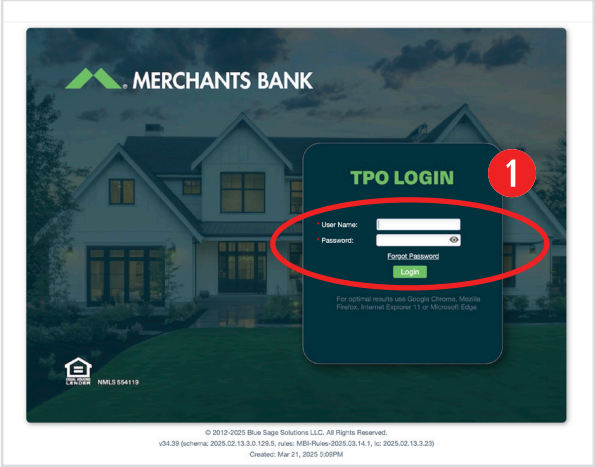
MERCHANTS BANK

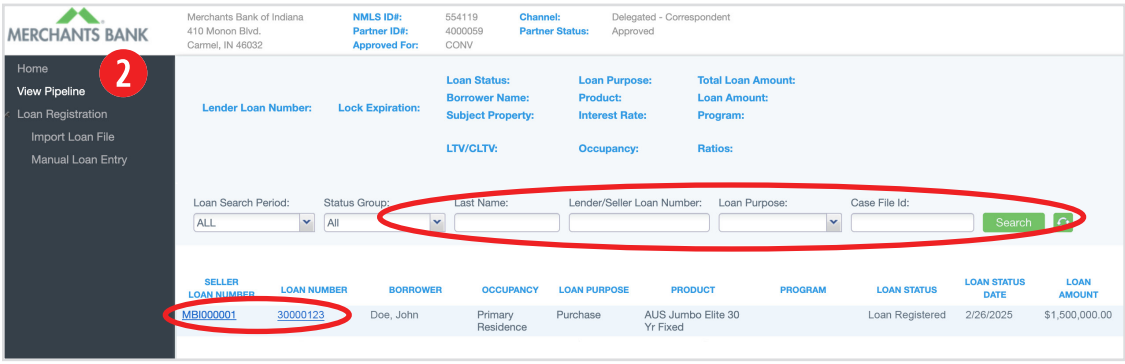
JOB AID:

LOAN SUBMISSION FOR PRE-PURCHASE REVIEW

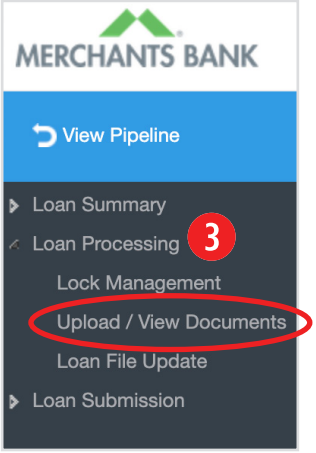
1. Navigate to the TPO Portal login page, **https://tpoportal.bankmerchants.com**, and enter your username and password.



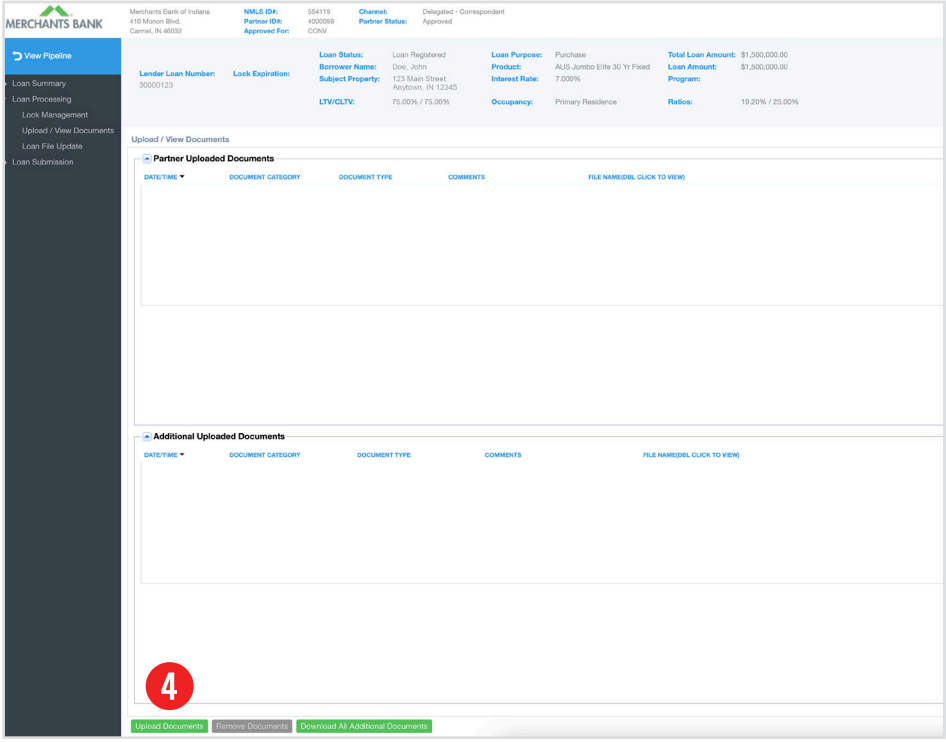
2. Access the loan you wish to submit for Pre-Purchase Review by selecting **View Pipeline**, then searching for the loan. Select the **Loan Number** link to open the loan.



3. On the left menu navigation, click on **Loan Processing** and then select **Upload/View Documents**.



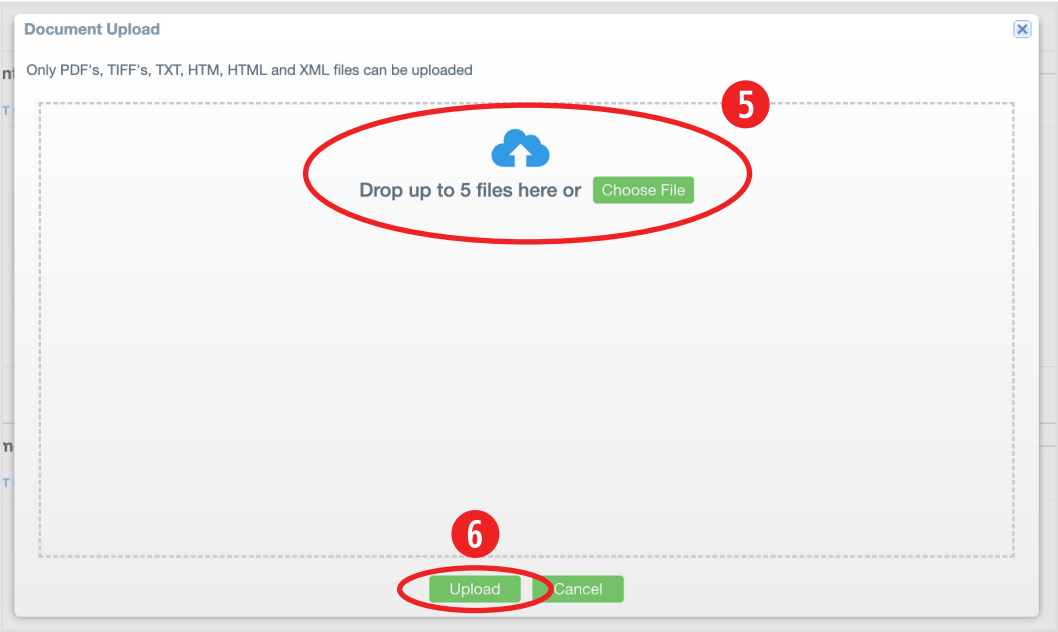
4. Click the **Upload Documents** button in the bottom left corner of the screen. This will bring up the Document Upload popup.



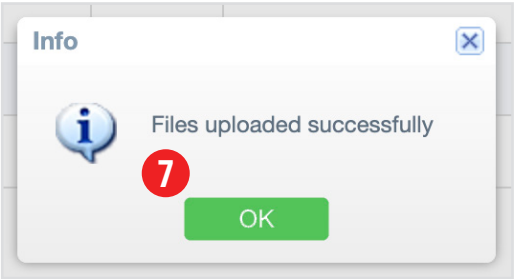
5. From the **Document Upload** screen, select **Choose File**, or you can **drop** your uploads. Repeat these steps if there are multiple documents to upload.

   NOTE: *The system has a maximum file size limit of 200MB for individual files. If your file is larger than 200MB, you may need to split into separate files to avoid upload errors.*

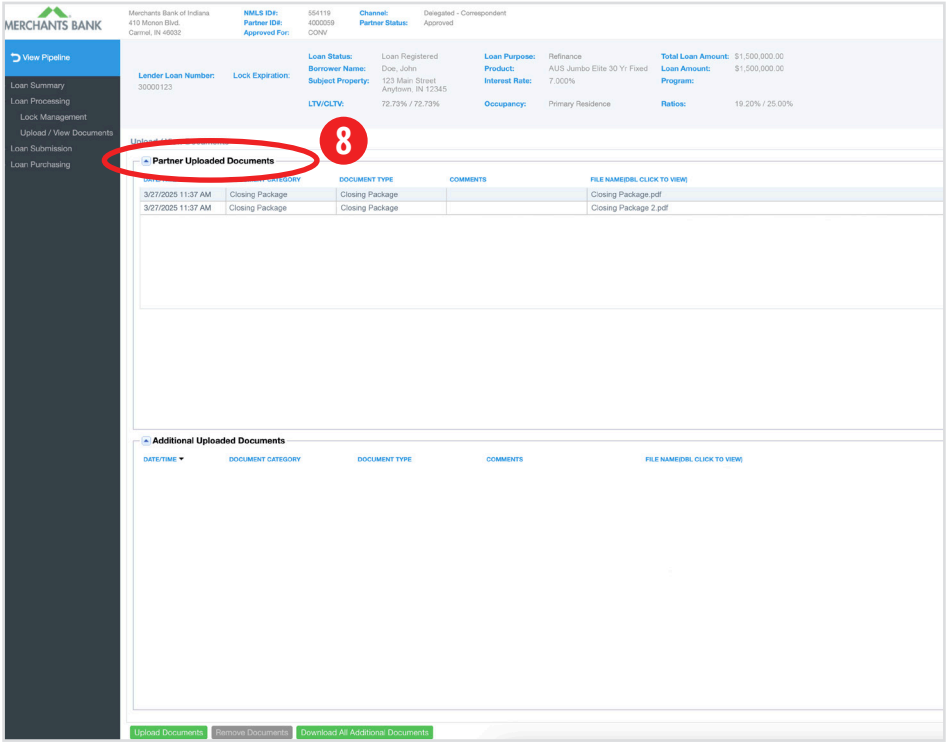
6. Once all documents have been added, click the **Upload** button at the bottom of the screen.



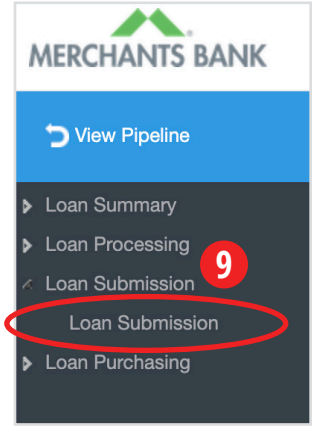
7. The system may take a few seconds to process the files. You will receive a **Success** message when the files have been successfully uploaded. Click **OK** to close the box.



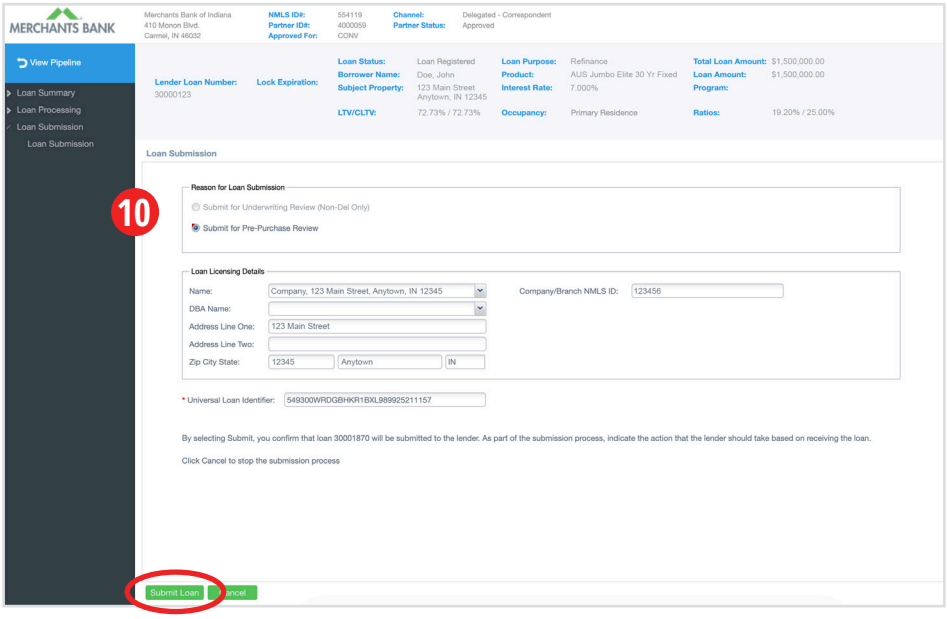
8. All files uploaded by the seller will appear in the **Partner Uploaded Documents** section. You will have to refresh the screen to see documents that were just uploaded.



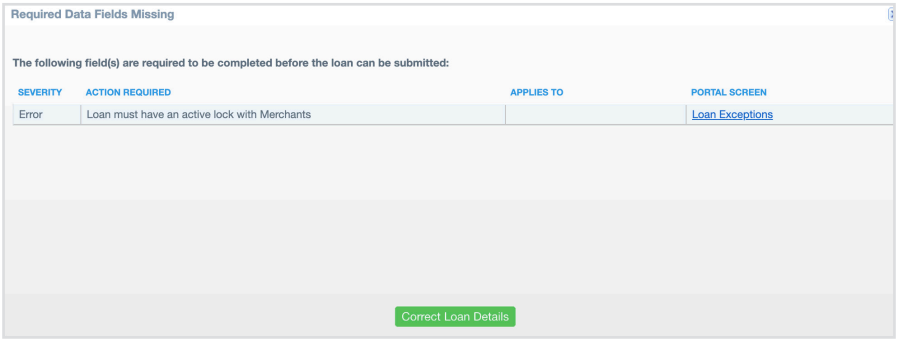
9. After all required documents for Pre-Purchase Review have been uploaded, navigate to the left menu and click on **Loan Submission**.



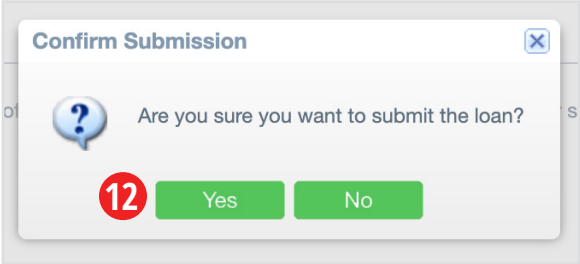
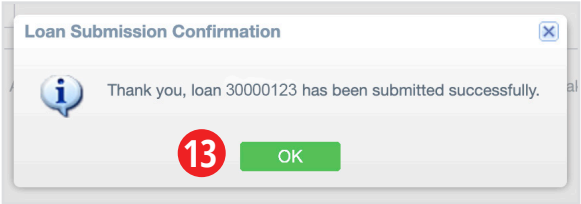
10. On the Loan Submission screen, the **Submit for Pre-Purchase Review** radio button will be pre-selected in the **Reason for Loan Submission** section, and your company information will be listed in the **Loan Licensing Details** section. Select the **Submit Loan** button to submit the loan for Pre-Purchase Review.



11. The system will run validations to ensure all submission requirements have been completed. If there are any issues, you will receive an error message with a description of the issue(s) that need to be resolved. Complete any of the items listed in the **Action Required** field.



12. When all validation errors have been cleared, click the **Submit Loan** button again, then click **Yes** on the Confirm Submission popup.



13. You will receive a **Loan Submission Confirmation** message if the submission was successful. Select OK and you will be taken back to the Portal home screen.