



SOUTHPOINT

FINANCIAL SERVICES
NMLS # 32841

To upload a loan:

www.spfswholesale.com

Click TPO Portal/Log in

Click Create/Import a loan

Import Fannie Me 3.2

Go to Pipeline/Click Loan Pipeline

Click on loan

Click IMAGING on Bottom Left/Upload Document/ File to upload/ Upload File. Under DOCUMENT TYPE **FOR INITIAL SUBMISSION YOU CAN PICK OTHER AND UPLOAD YOUR FULL FILE AS ONE PDF. CLICK RED SUBMIT BUTTON TO SUBMIT.**

Please include your fee sheet and we will disclose the full file to your borrower via e-signature

Once borrower e-signs you are emailed a full copy for your records.

PRELIMINARY FINDINGS MUST BE RAN ON ALL LOANS EXCEPT NON QM AND TBD FILES, THESE MUST BE INCLUDED IN LOAN SUBMISSION PACKET.

To order an appraisal:

A Credit Card link is emailed to broker/borrower/processor to fill out to order appraisal, once this is filled out Southpoint will order appraisal off our panel of appraisers, if you have appraisers in your area you would like to use please send me 5 to 6 and we will work off of your panel.

To lock a loan:

www.spfswholesale.com

Click TPO Portal/Log In

Click on CREATE/Import a Loan

Import Fannie Mae 3.2

Go to FORMS & DOCS

Optimal Blue Price/Lock

Here you can price out your loan and lock it.

To Upload Conditions:

Log In

Go to Pipeline and click on loan

Go to IMAGE FLOW

Click Upload UP Arrow on upper Right Side

Click File to upload/Document Type Conditions/

Click RED SUBMIT BUTTON TO SUBMIT.

To ask questions about loan conditions, appraisal status, etc... go to Pipeline and click on loan and then click on Notes tab at top right. Add Note and Southpoint Processor/Set-up/Account Executive will be notified.

Preliminary CD can go out before CTC if all needed items are in.