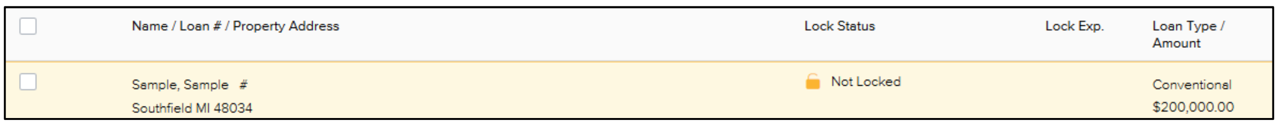
TPO Document Upload

The TPO Document Upload folder should be used for the initial and all subsequent document uploads. A trigger has been programmed to inform the MLS operations team that documents have been uploaded to the file.

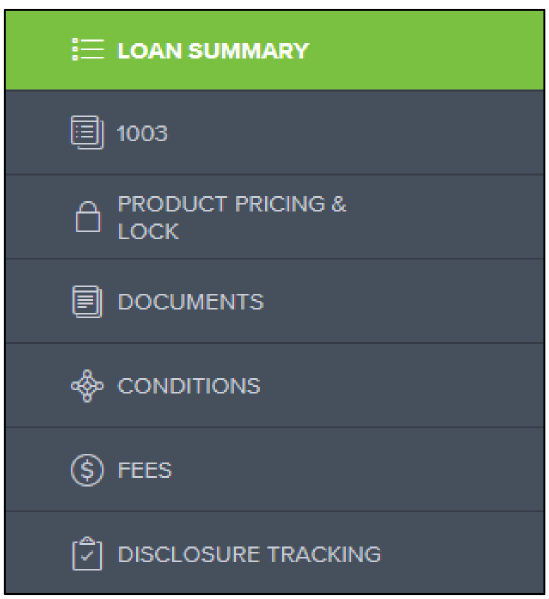
To create the bucket for document upload please follow the steps as outlined below.

A. Open the loan file from the main pipeline view in TPO Connect by choosing “Pipeline” from the green banner.

B. Double click on the loan file to open the loan details.

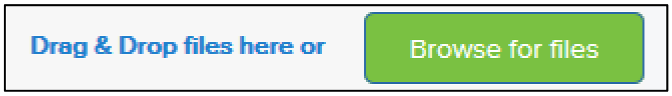


C. From the loan details view, choose “Documents” from the gray banner on the left side of the screen.

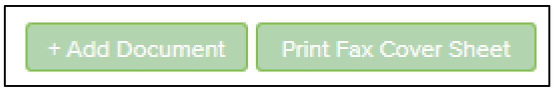


D. The TPO Document Upload folder will default in the loan file.

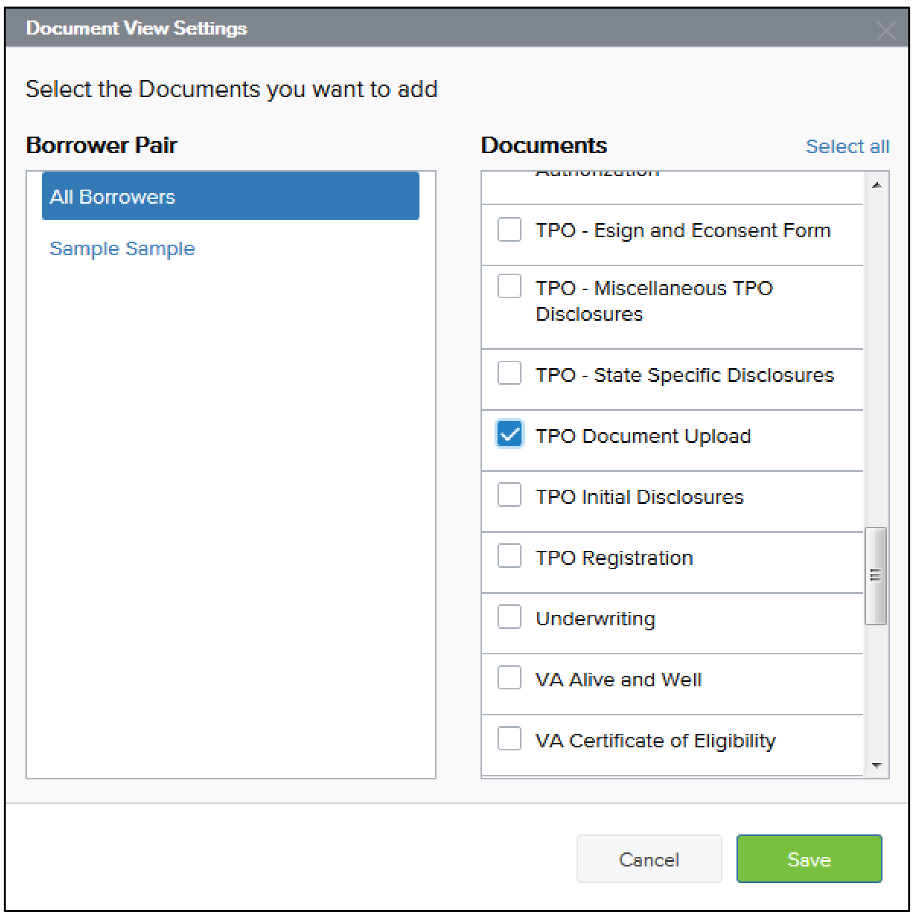
E. Documents can be added to the folder by using the "Drag & Drop" feature or by choosing the "Browse for files" button.



F. If the TPO Document Upload folder is not available, click "+ Add Document". The Document View Settings window will open.



G. Place a checkmark next to TPO Document Upload from the Documents column and click "Save".



H. The folder now appears in the document list and documents may be added.