HERO Broker Portal Training:

How to Lock a Loan

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How to Lock a Loan

Products & Pricing

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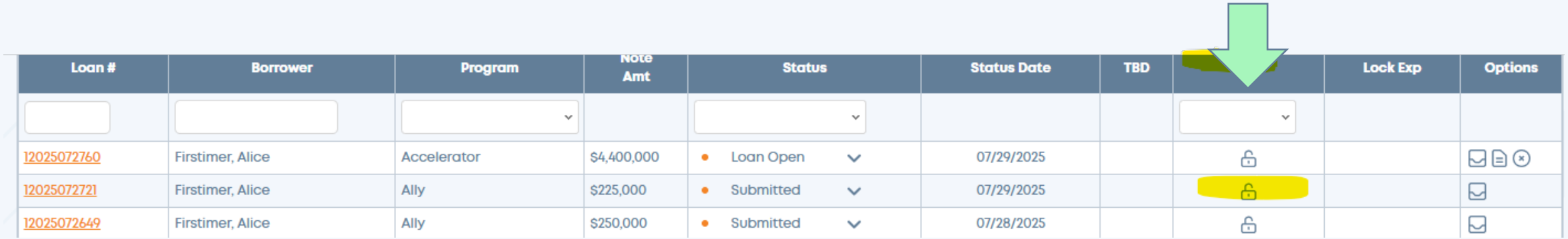

Loan #	Borrower	Program	Note Amt	Status	Status Date	TBD		Lock Exp	Options
12025072760	Firstimer, Alice	Accelerator	$4,400,000	Loan Open	07/29/2025				
12025072721	Firstimer, Alice	Ally	$225,000	Submitted	07/29/2025				
12025072649	Firstimer, Alice	Ally	$250,000	Submitted	07/28/2025				

Step 1:

When logging into the portal, you can click on the lock icon to access the Product & Pricing page.

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Products & Pricing

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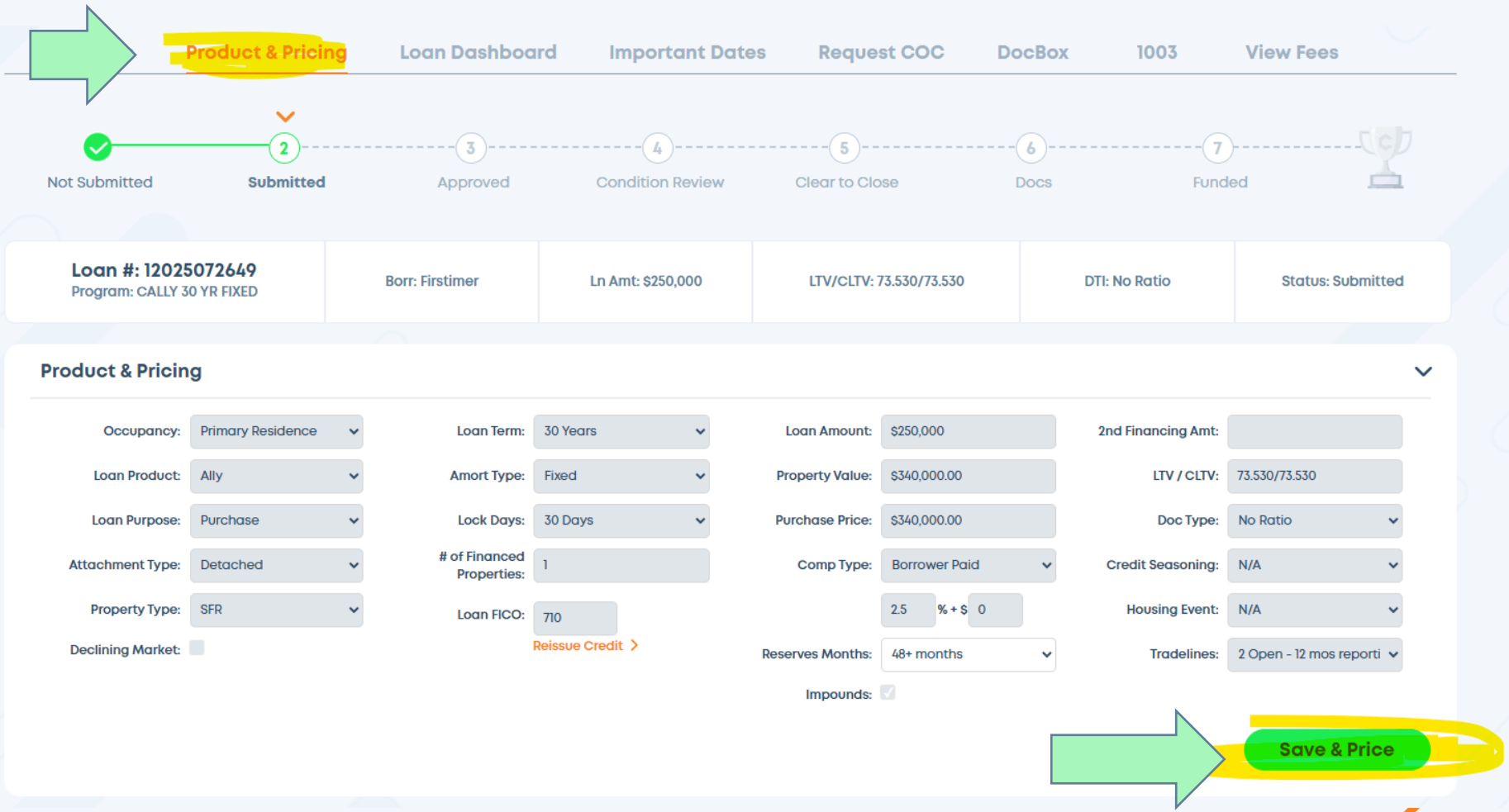
Step 2:

On the Product & Pricing page, you will need to click Save & Price.



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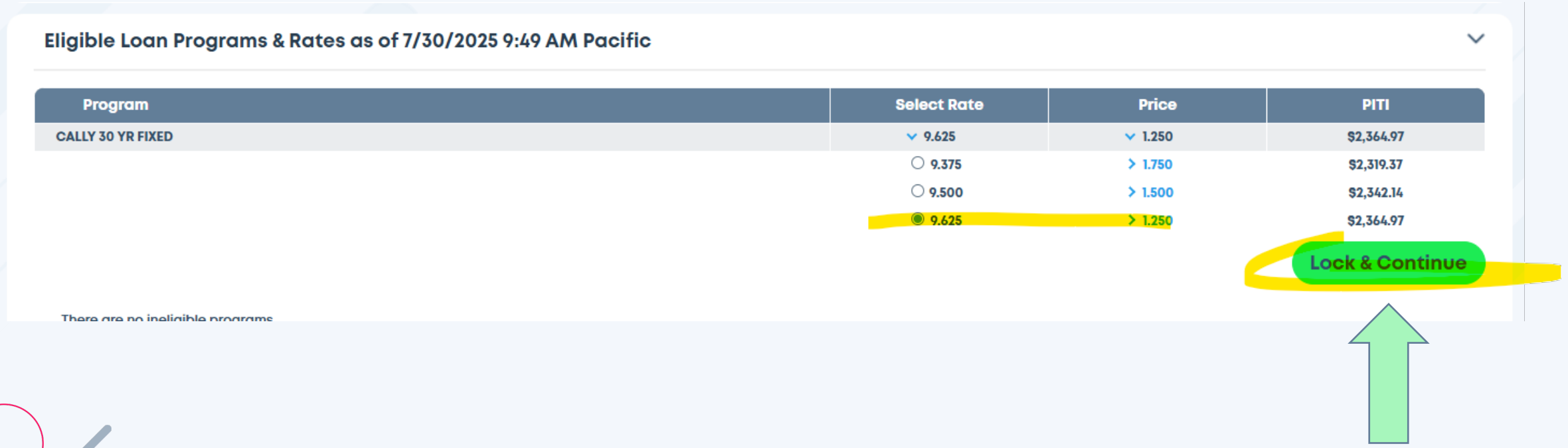
Step 3:

You will then choose your rate, and then click Lock & Continue



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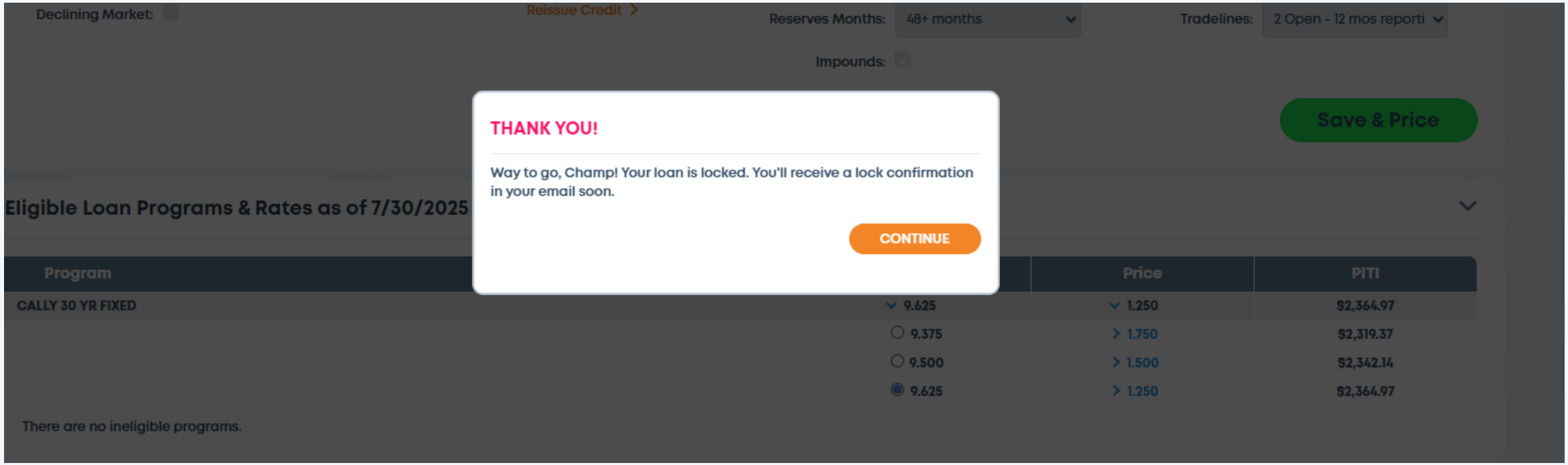
The loan is locked, and you will then receive a lock conformation via email.



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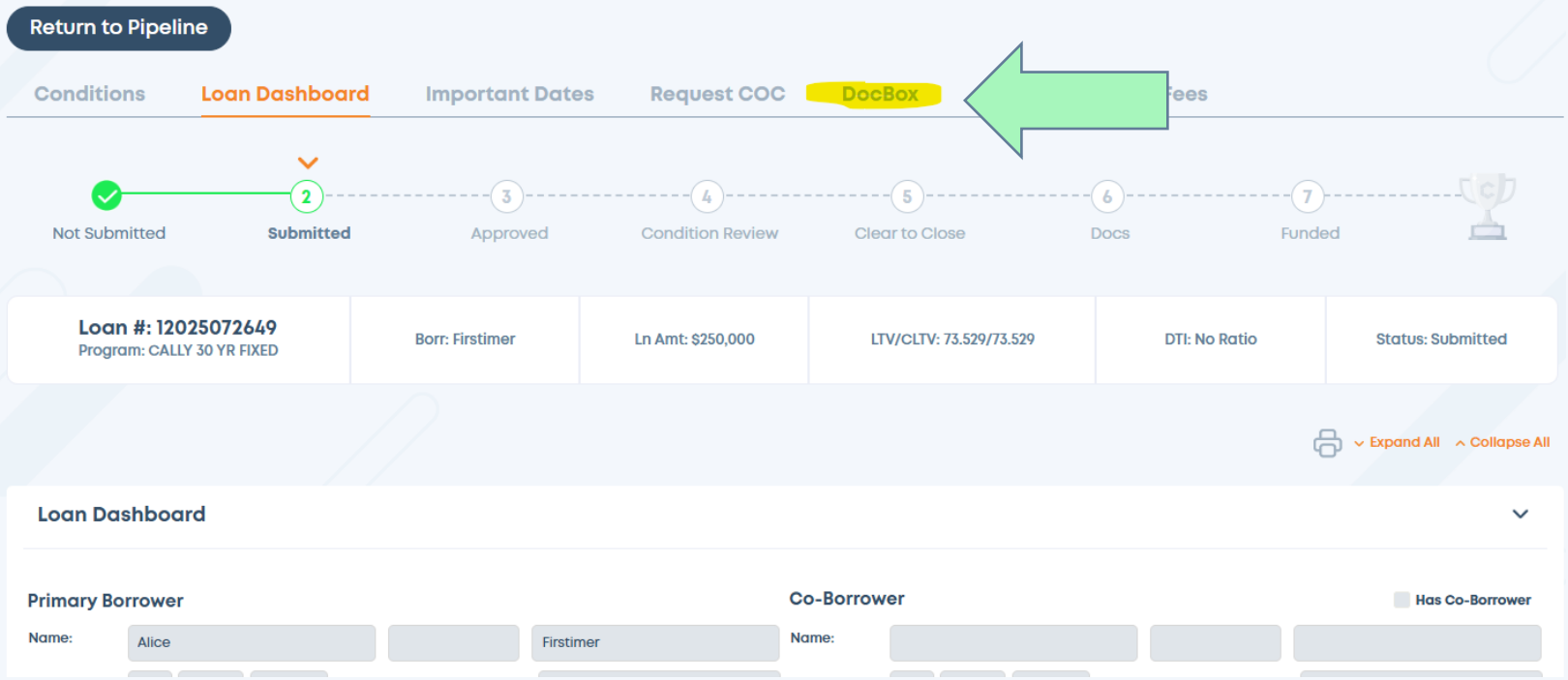
DocBox

If you need to look for the lock in the file, you will go to the DocBox within the loan file.



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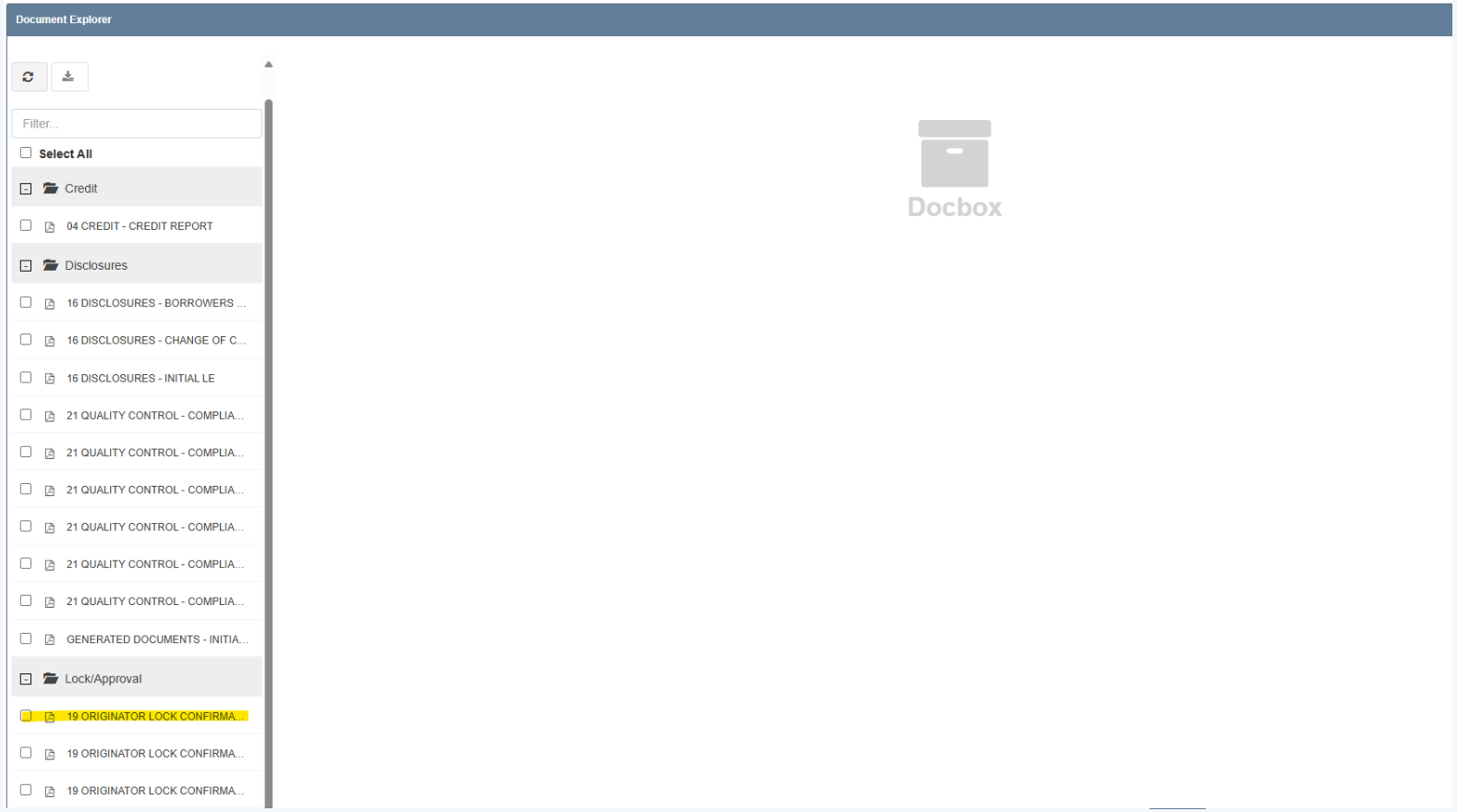
Lock Confirmation

Once you are in DocBox, navigate to the options on the left-hand side and click on lock confirmation.



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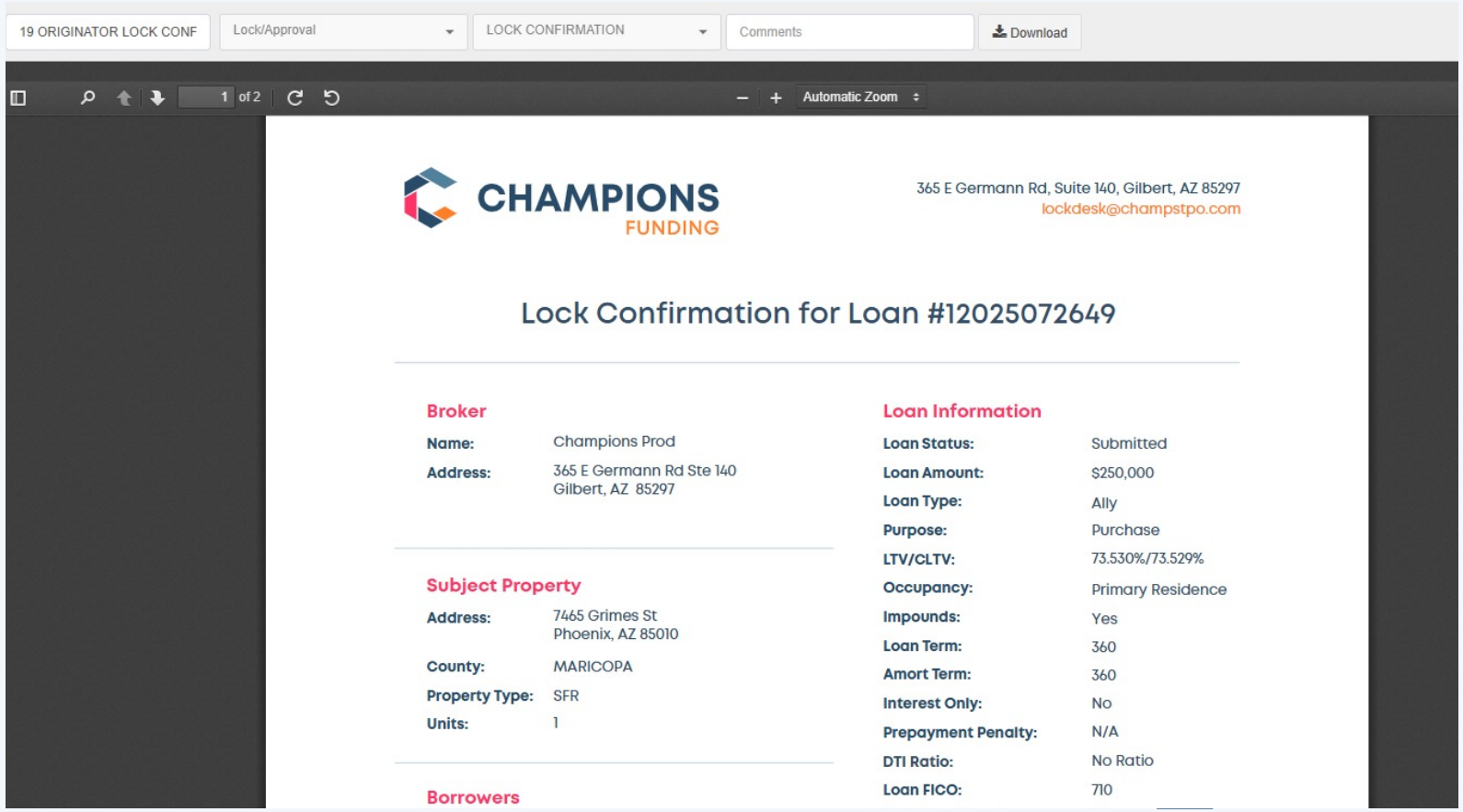
You can then PDF the Lock Confirmation.



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