HERO Broker Portal Training:

TBD to Approval

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FUNDING

Step 1:

From your pipeline, please click the TBD icon.

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Step 2:

You will then be asked to plug in the property address and go from there. Snippets below of the process. Please reach out to Scenarios@ChampsTPO.com if you run into any issues.

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Step 3:

It requires broker to enter the property address and the app date (please use today for app date).

Convert to App

Address:

Please enter.

Santa Ana   CA   90026

County: LOS ANGELES

Application Date: 04/16/2024

Save   Cancel

Need help? Email **Scenarios@ChampsTPO.com**

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Step 4:

You will then they see this:

You'll need to click to Send Initial Disclosures on that popup. If you don't send disclosures the same day, the loan will be reverted to a TBD loan with the property address removed over night.

This loan is a full application now.

Please be sure to <u>send initial disclosures</u> today to keep this converted application, and upload the required documentation on the <u>Conditions</u> page.

Send Initial Disclosures   Upload Documentation