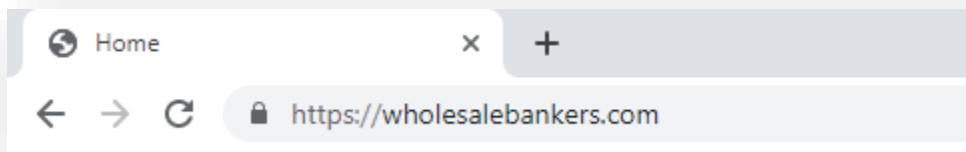


How to Submit a File through WMB Web Portal

1. Go to WMB's website @ www.wholesalebankers.com



2. Click on "Web Portal" on the top right corner

[HOME](#) [RATES](#) [RESOURCES](#) [APPRAISAL ORDER](#) [WEB PORTAL](#)

3. Using the ID and PW that were assigned, log in WMB's web portal

A screenshot of the WMB web portal login page. At the top is the WMB logo and the text "WHOLESALE MORTGAGE BANKERS". Below this is a blue horizontal bar. The word "Welcome" is displayed. There are two input fields: "User Name" and "Password". To the right of each field is a red error message: "The User Name field is required." and "The Password field is required." respectively. Below the input fields is a "Log in" button. At the bottom, there is a link: "Forgot your password? Click [here](#) to reset your password."

4. Click on “New File”



5. Create new file

- a. Fill out
 - i. Property State
- b. Select
 - i. Template File – Either Purchase or Refi
 - ii. Loan Officer – to add a new loan officer, please email info@wholesalebankers.com
- c. Import FNM 3.2 File
 - i. Click “Choose File”
 - ii. Browse and select the FNM 3.2 file
- d. Click on “Create New File”

Organization: B

Property State: CA

Template File: Broker_Purchase Template

Fannie Mae File: Choose File | FNM 3.2


Loan Officer: Jae.Lee

6. Under "Home" tab, you may find a brief summary of the loan - please confirm terms of the loan
- a. After making any change, please click on **Save** button at the bottom left corner of each page

7. ****IMPORTANT**** Please click on **“Select Loan Program”** under **“Loan Info”** section under **“Home”** tab

Loan Info			
Occupancy	Primary Residence ▼	Appraised Value	<input type="text"/>
Purpose of Loan	Purchase ▼	Pur. Price / Est. Value	690000
Select Loan Program		Base Loan	552000
Loan Program Code	<input type="text"/>	PMI Type	None ▼
Loan Program Name	<input type="text"/>	MIP Percent	<input type="text"/>

8. Select the Loan Program by clicking the **“Select”** button


Hello, jae.lee!

WHOLESALE MORTGAGE BANKERS

Pipeline
New File

[Home](#)

[Status](#)

[Conditions](#)

[1003 Page 1](#)

[1003 Page 2](#)

[1003 Page 3](#)

[Stored Documents](#)

[Pricing and Lock](#)

[Credit](#)

[Desktop Underwriter](#)

[Loan Product Advisor](#)

[Merge Fannie Mae File](#)

[Export Fannie Mae File](#)

[Lock History](#)

Select Loan Program

[Cancel and return](#)

Loan Program Code	Loan Program Name	Mortgage Type	Amortization Type	
FHA30	FHA Fix 30 - 203(b)	FHA	Fixed	Select
CF30	Agency Conf. Fix 30	Conventional	Fixed	Select
CF15	Agency Conf. Fix 15	Conventional	Fixed	Select
HBF30	High Balance Fix 30	Conventional	Fixed	Select
HBF15	High Balance Fix 15	Conventional	Fixed	Select
P171	Portf. 7/1 ARM (2/2/6, m2.250, 1yrLIBOR)	Conventional	ARM	Select
N130	Niche1 Fix 30	Conventional	Fixed	Select
N151	Niche1 5/1 ARM (2/2/6, mV, F=S, 1yrCMT)	Conventional	ARM	Select
N151-IO	Niche1 5/1 ARM IntOnly (2/2/6,mV,F=S,1yrCMT)	Conventional	ARM	Select
N171	Niche1 7/1 ARM (2/2/6, mV, F=S, 1yrCMT)	Conventional	ARM	Select
N251	Niche2 5/1 ARM (2/2/6, m4.950, F=S, 1yrCMT)	Conventional	ARM	Select
N271	Niche2 7/1 ARM (2/2/6, m4.950, F=S, 1yrCMT)	Conventional	ARM	Select
N2FN51	Foreign National 5/1 ARM (2/2/6,m4.950,F=S,1yrCMT)	Conventional	ARM	Select
N2FN71	Foreign National 7/1 ARM (2/2/6,m4.950,F=S,1yrCMT)	Conventional	ARM	Select
FVOE30	Fast VOE Fix 30	Conventional	Fixed	Select
FVOE71	Fast VOE 7/1 ARM (5/2/5, m2.250, 1yrLIBOR)	Conventional	ARM	Select
EVOE30	Easy VOE Fix 30	Conventional	Fixed	Select
EVOE71	Easy VOE 7/1 ARM (5/2/5, m3.500, 1yrLIBOR)	Conventional	ARM	Select
EPNL30	Easy P&L Fix 30	Conventional	Fixed	Select
EPNL71	Easy P&L 7/1 ARM (5/2/5, m3.500, 1yrLIBOR)	Conventional	ARM	Select
WVOE30	WMB VOE Fix 30	Conventional	Fixed	Select
FVSE71	FastExpanded 7/1 ARM (2/2/6, m3.750, 1yrLIBOR)	Conventional	ARM	Select

[Cancel and return](#)

9. To upload the submission package, go to "Stored Documents" tab

WMB
WHOLESALE MORTGAGE BANKERS

Pipeline New File 2019030111 - KOO

Home
Status
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1003 Page 2
1003 Page 3
Stored Documents
Pricing and Lock
Credit
Desktop Underwriter
Loan Product Advisor
Merge Fannie Mae File
Export Fannie Mae File
Lock History

Document Images

Upload Document

Status	Category
Inactive	TrashIt
Inactive	TrashIt
Inactive	CREDIT
Inactive	TrashIt
Inactive	TrashIt
Inactive	TrashIt
Inactive	TrashIt
Inactive	TrashIt
Inactive	TrashIt
Approved	INCOME
Reviewed	REO
Inactive	TrashIt

10. Click on "Upload Document"

WMB
WHOLESALE MORTGAGE BANKERS

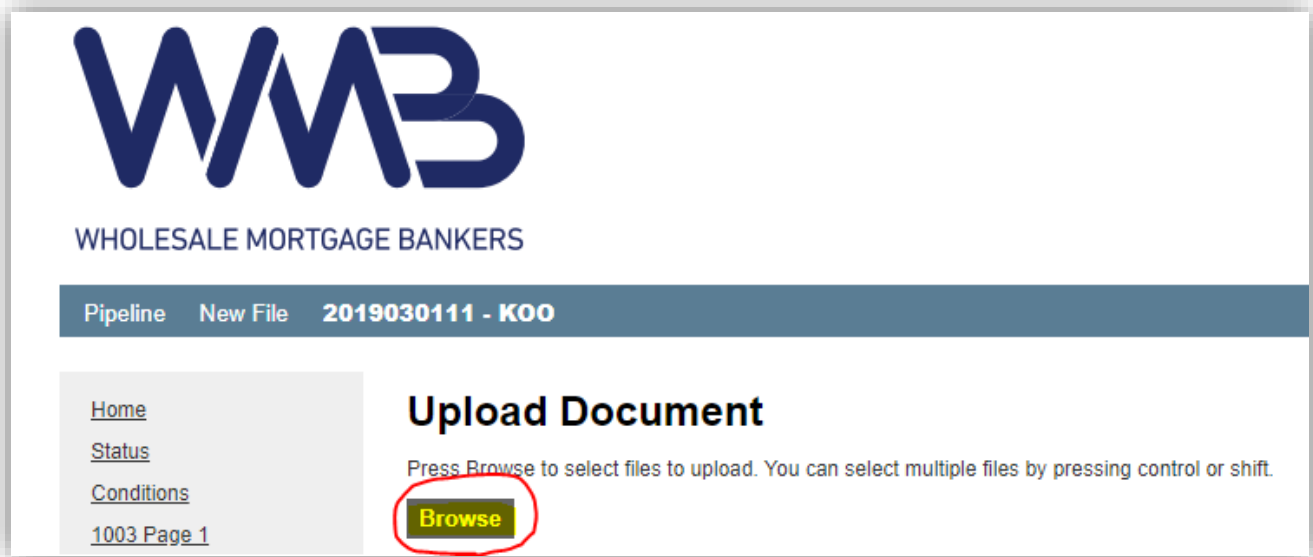
Pipeline New File 2019030111 - KOO

Home
Status

Document Images

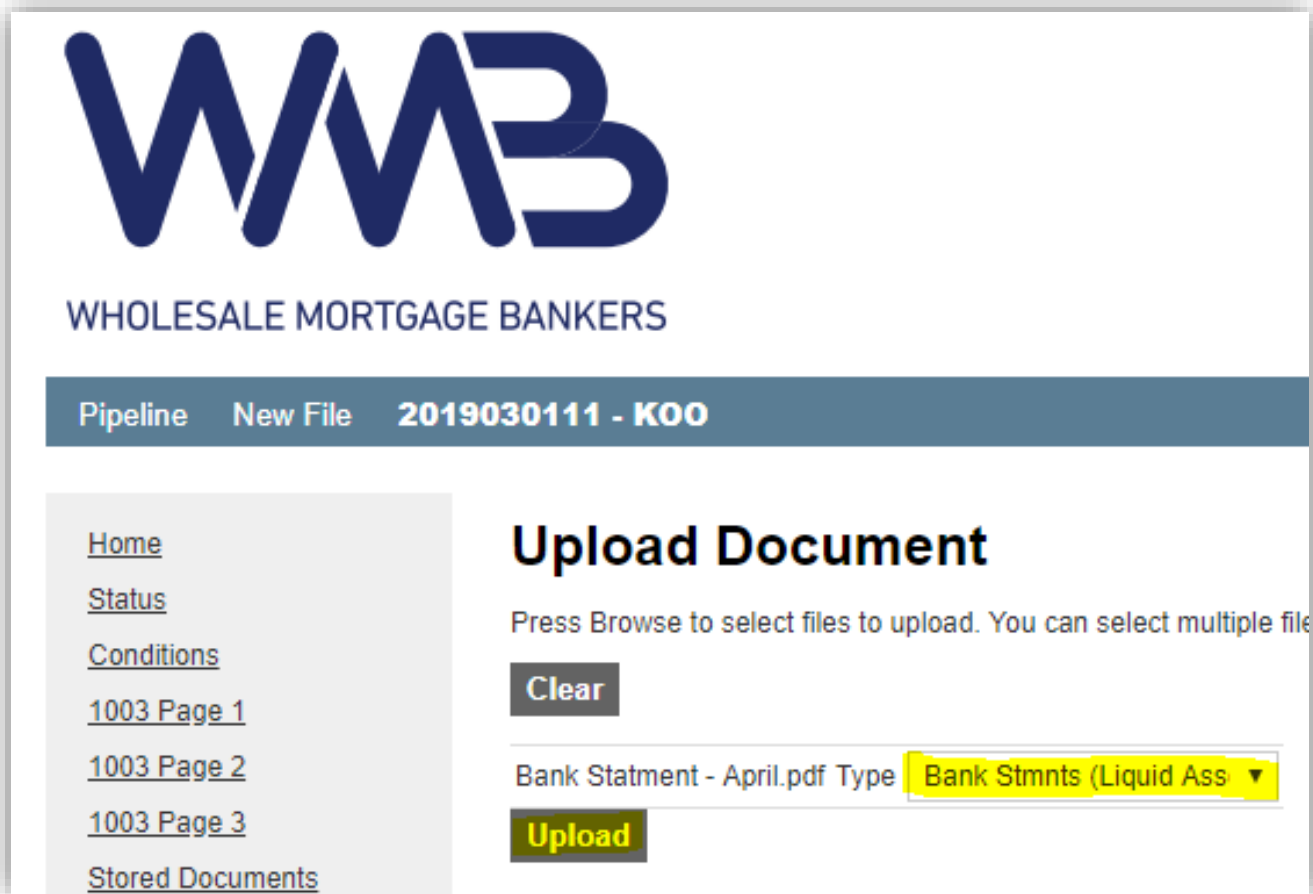
Upload Document

11. Browse and select the submission package you wish to upload



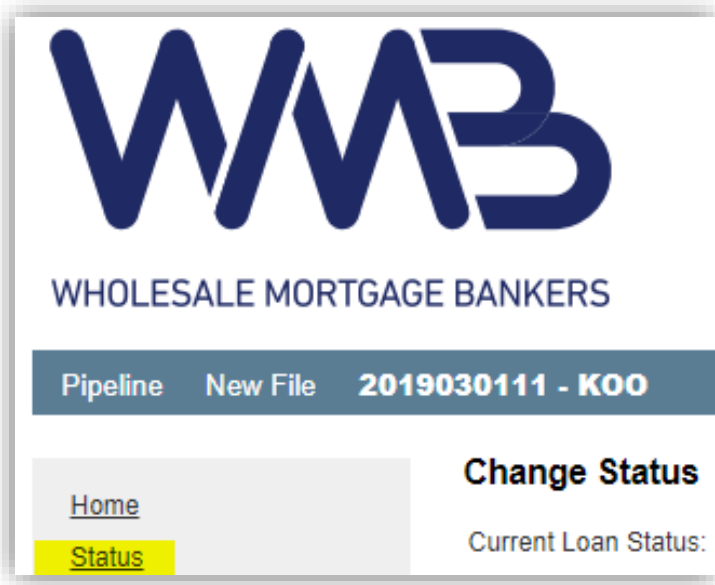
The screenshot shows the WMB (Wholesale Mortgage Bankers) interface. At the top left is the WMB logo. Below it, the text 'WHOLESALE MORTGAGE BANKERS' is displayed. A dark blue navigation bar contains the text 'Pipeline New File 2019030111 - KOO'. On the left side, there is a vertical menu with links: 'Home', 'Status', 'Conditions', and '1003 Page 1'. The main content area is titled 'Upload Document' and contains the instruction 'Press Browse to select files to upload. You can select multiple files by pressing control or shift.' A yellow 'Browse' button is highlighted with a red circle.

12. Select the appropriate category for the uploaded document (Will expedite WMB's review of the file)
- a. **Uploading each document separately and categorizing help WMB set up the file a lot faster**
 - b. Upload additional documents by clicking on "Upload" button



The screenshot shows the WMB interface. At the top left is the WMB logo. Below it, the text 'WHOLESALE MORTGAGE BANKERS' is displayed. A dark blue navigation bar contains the text 'Pipeline New File 2019030111 - KOO'. On the left side, there is a vertical menu with links: 'Home', 'Status', 'Conditions', '1003 Page 1', '1003 Page 2', '1003 Page 3', and 'Stored Documents'. The main content area is titled 'Upload Document' and contains the instruction 'Press Browse to select files to upload. You can select multiple file'. Below this instruction is a 'Clear' button. A dropdown menu is open, showing 'Bank Statment - April.pdf Type' and 'Bank Stmnts (Liquid Ass' with a downward arrow. Below the dropdown is a yellow 'Upload' button.

13. ****IMPORTANT**** Go to “Status” Tab once all documents are uploaded and have confirmed the correct 1003 information



14. **Prompt will ask if you wish to move the status to “Submitted for Loan Setup”**

- a. If file is ready to be moved to Loan Setup, please update the status of “Submitted for Loan Setup”
- b. If file is not yet ready to move to Loan Setup, please exit out of the prompt
- c. WMB will be notified that the file is submitted ONLY when the status changes to **“Submitted for Loan Setup”**

Congratulations~!! You have completed uploading a file through WMB Web Portal~!!

If you are having any issue submitting your file through WMB Web Portal, please contact your Account Executive at any time.

Thank you Always for your Partnership~!