



6 Steps from Register to Submit (Wholesale)

REGISTER

- 1 Click **Add New Loan** in the menu bar
- 2 In the pop-up window, select the **Loan Officer** and **Loan Processor** and click **Next**
- 3 Select **Import from FNM 3.2 file**, click **Browse Files**, select the file and click **Next**
- 4 Verify loan information on **1003** screens and click **Register**

FLOAT OR LOCK

- 1 Click the **Product Pricing & Lock** link on the left menu and then **Search Product & Pricing**
- 2 Enter the required loan information and click the **Search Product & Pricing** button
- 3 Click **Details** button to view the pricing details
- 4 Choose **Float** or **Request Lock**

REISSUE CREDIT

- 1 Click **Order Credit** on the left menu under Loan Actions
- 2 Select the **Credit Provider**, click to **Reissue Credit** and enter the **Reference Number**
- 3 Enter **User Name** and **Password** for the credit provider
- 4 Checking **Save Login Information** will save the credit credentials for future use
- 5 Click the **Reissue Credit** button on the bottom right

RUN AUS

- **Run DU**
 1. To run DU, select **Order DU** on the left menu under Loan Actions
 2. Ensure the **Credit Provider**, **User Name**, **Password** and **Reference Number** are complete
 3. Click the **Order DU** button
- **Run LPA**
 4. To run DU, select **Order LPA** on the left menu under Loan Actions
 5. Select the **Property Type** in the drop down menu
 6. Click the **Order LPA Underwriting** button
- **Note:** South State Bank accepts DU/LP Findings run by TPO partners and released to South State Bank

DISCLOSE

- 1 Complete the [Loan Estimate Disclosure Form](#)
- 2 Click **Documents** on the left menu
- 3 Upload initial 1003, credit report, Loan Estimate Disclosure Form and MI quote (if applicable) to the **[UNASSIGNED]** section via **Drag & Drop** or **Browse for Files**
- 4 On the **Loan Actions** menu, click **Disclosures**
- 5 Click the **Ready to Disclose** button

SUBMIT

- 1 Click **Documents** on the left menu
- 2 Upload the loan documents to the **[UNASSIGNED]** section via **Drag & Drop** or **Browse for Files**
- 3 On the **Loan Actions** menu, click **Submit Loan**
- 4 Click **Continue** when prompted to confirm the submission request