

Steps for using portal

1. www.quonticwholesale.com, click on broker log on in upper right
2. Put in credentials for LO and processor and continue
3. Go to “add new loan” on blue bar at top n click
4. Export 3.4 file
5. Look over on left go thru pages and make sure anything that is highlighted is filled in
6. Assets/liabilities must be on 1003, with acct type, name, and dollar amt
7. Next click on product and pricing on left, go thru each column (when you get to section that shows LP, Du etc, please UNCLICK ALL EXCEPT OTHER, then continue
8. Pricing will come up with rates. Go to the par rate, look over to right where the paper icon click n export, and then hit ok
9. Next you will need to reissue credit. Look over on left for “order credit “ click on it and it will open. Select the credit provider you use, hit reissue, put in whoever pulled credits ref# and credentials, hit re-issue and YES for adding new liabilities
10. Next upload all docs needed for initial registration and getting out disclosures (borrowers cert and Auth, the submission form, ID's, P&L filled out for S/E product if using, bank statement, broker fee agreement signed by LO and borrower, first page of 1040, if purchase will need purchase contract) AND put them into the INTIAL PACKAGE UPLOAD BUCKET and hit submit button

STEP 2 : once the disclosures have been sent out and any additional documentation is collected, upload to the unassigned bucket and click resubmit.

11. When the CONDITIONAL APPROVAL HAS BEEN SENT go to the Documents on left and click on that and then upload the additional docs requested. These go into the unassigned bucket and you will then click re-submit. If you do not hit the re-submit button no one inside Quontic will be aware of any docs uploaded.