TALEA™

Quickstart Guide

Powered by

The Bancorp™

TALEA™

Getting started with Talea™

▸ HOW TO REGISTER

Talea's integration gives you single sign-on capability from your advisor home page. There's no need to register.

▸ HOW TO ACCESS

1. Locate the single sign-on enabled link on your advisor homepage.

2. Click the link and you will be taken directly to the Talea loan origination platform.

▸ HOW TO CREATE A LOAN PACKAGE

1. Click **BEGIN** in the *Create a New Loan Package* box. (OR click the 📝 icon in the navigation at the top right of the screen.)

2. Click **CREATE** a new loan package to start generating a new loan application package.

3. Follow these simple steps to create and submit the loan application package:

   A. Define the loan parties and pricing.

   B. Choose how documents will be signed and delivered.

   C. Communicate with your clients, as needed.

   D. SUBMIT loan packages to DocuSign® when prompted.*

Clicking **SUBMIT** enables quick and convenient digital execution through guided DocuSign signing ceremonies. All routing, reminders, and identity verification are handled automatically.

You can track in-flight loan packages on the *New Loan Packages* landing page under "My Loan Packages." Live status updates and "next step" details help keep in-flight packages organized.

▸ HOW TO CREATE AN ESTIMATE

1. Click **ESTIMATE** in the *Estimate Credit Limit* box. (OR click the 🔍 icon in the navigation at the top right of the screen.)

2. Select the **Click to upload an account** box to find an account file.

3. Choose the file type.

4. Select the account file and click **CONTINUE**.

5. Pick the uploaded account(s) you would like to use to simulate a client's estimated drawing power.

6. Click **SIMULATE**.

Within seconds of clicking **SIMULATE**, you'll have a comprehensive drawing power estimate using real-time information for review by your client. From there, you can start a new loan package by clicking **APPLY**; generate a printable version of the estimate by clicking **PRINT**; or click **SAVE** to return to the estimate later.

Talea also allows you to manage the printable version of your saved estimate simulations for future use or comparison. Click **MANAGE SAVED** to search, view, print and/or delete saved estimate simulations.

💬 SEND US YOUR FEEDBACK

Let us know your questions and comments about Talea so that we can provide a better user experience for everyone.

✉ TaleaSupport@thebancorp.com

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*Before submitting the package, you may download and save/print the pre-filled pdf loan documents if your clients prefer signing via traditional means. Then fax or mail to us.