Adding and Editing Templates

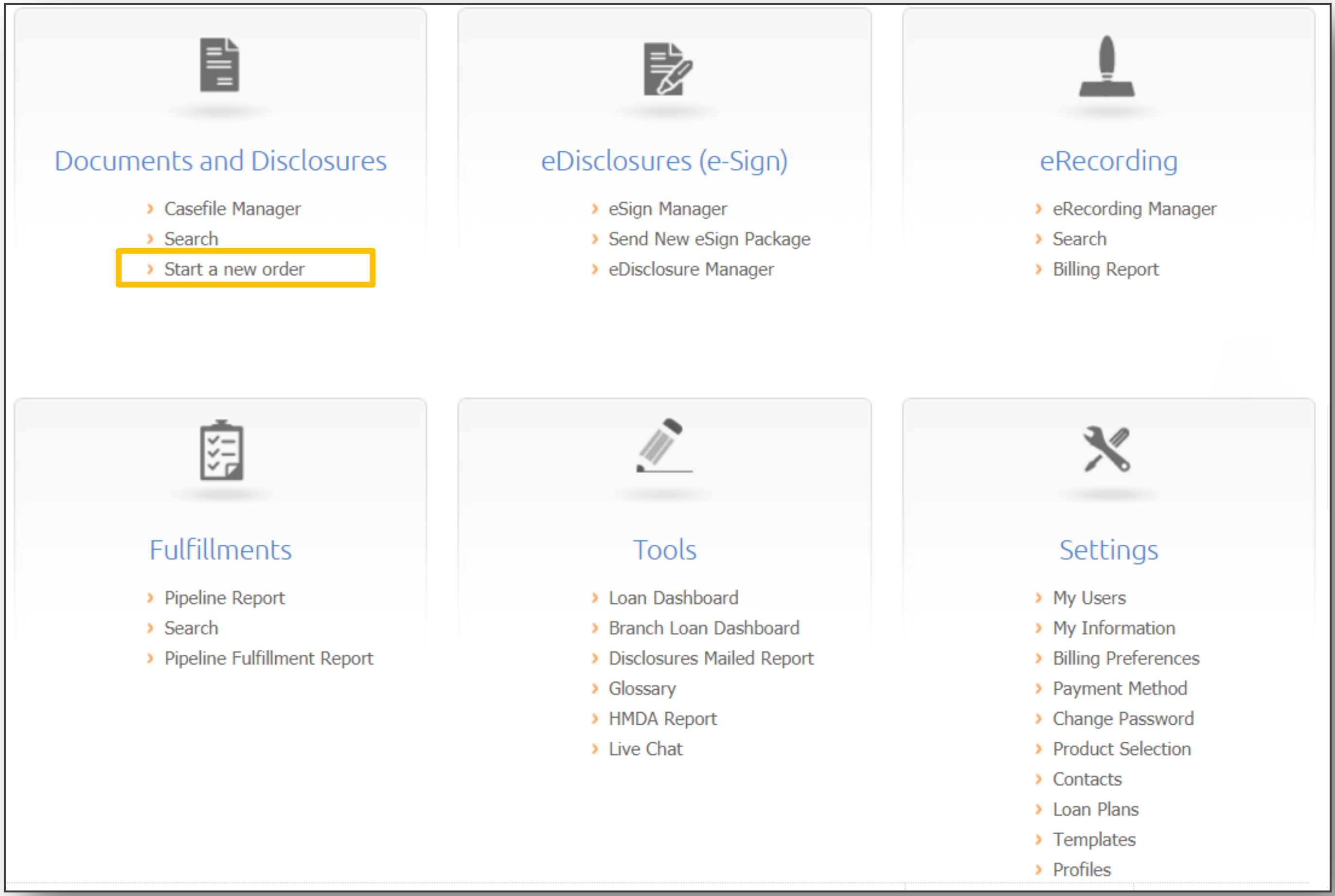
How to add, edit, and even send Templates through the PPDocs System.

NOTE - Not advised when using an LOS

March 28, 2018

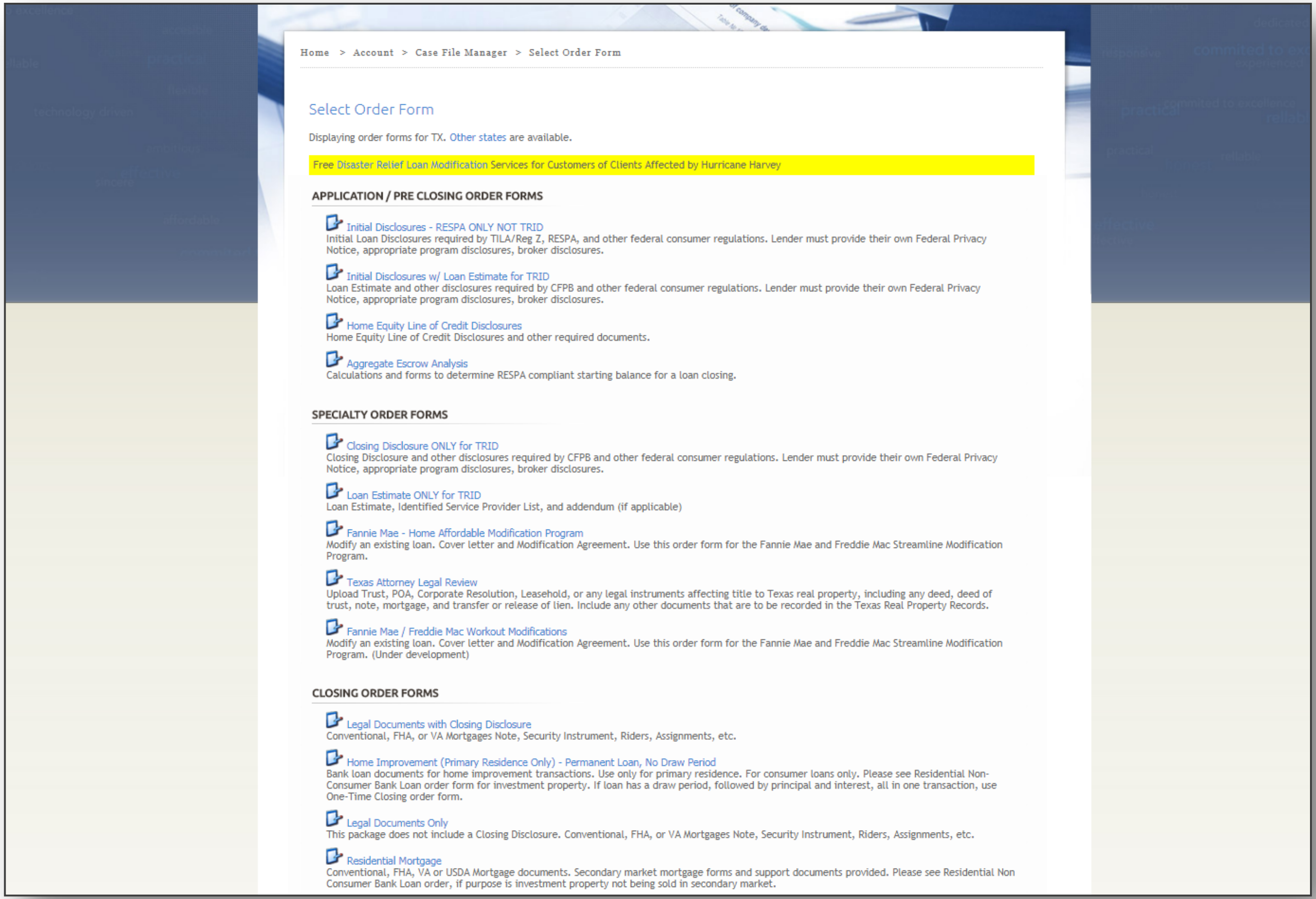
Add a new Template:

1. Login to PPDocs > Account > Under Documents and Disclosures > “Start a new order”



Select an Order Form to use:

2. Select the Property State.
3. From the list of Order Forms given, select the order you would like to use as your Template:



Home > Account > Case File Manager > Select Order Form

Select Order Form

Displaying order forms for TX. Other states are available.

Free Disaster Relief Loan Modification Services for Customers of Clients Affected by Hurricane Harvey

APPLICATION / PRE CLOSING ORDER FORMS

Initial Disclosures - RESPA ONLY NOT TRID
Initial Loan Disclosures required by TILA/Reg Z, RESPA, and other federal consumer regulations. Lender must provide their own Federal Privacy Notice, appropriate program disclosures, broker disclosures.

Initial Disclosures w/ Loan Estimate for TRID
Loan Estimate and other disclosures required by CFPB and other federal consumer regulations. Lender must provide their own Federal Privacy Notice, appropriate program disclosures, broker disclosures.

Home Equity Line of Credit Disclosures
Home Equity Line of Credit Disclosures and other required documents.

Aggregate Escrow Analysis
Calculations and forms to determine RESPA compliant starting balance for a loan closing.

SPECIALTY ORDER FORMS

Closing Disclosure ONLY for TRID
Closing Disclosure and other disclosures required by CFPB and other federal consumer regulations. Lender must provide their own Federal Privacy Notice, appropriate program disclosures, broker disclosures.

Loan Estimate ONLY for TRID
Loan Estimate, Identified Service Provider List, and addendum (if applicable)

Fannie Mae - Home Affordable Modification Program
Modify an existing loan. Cover letter and Modification Agreement. Use this order form for the Fannie Mae and Freddie Mac Streamline Modification Program.

Texas Attorney Legal Review
Upload Trust, POA, Corporate Resolution, Leasehold, or any legal instruments affecting title to Texas real property, including any deed, deed of trust, note, mortgage, and transfer or release of lien. Include any other documents that are to be recorded in the Texas Real Property Records.

Fannie Mae / Freddie Mac Workout Modifications
Modify an existing loan. Cover letter and Modification Agreement. Use this order form for the Fannie Mae and Freddie Mac Streamline Modification Program. (Under development)

CLOSING ORDER FORMS

Legal Documents with Closing Disclosure
Conventional, FHA, or VA Mortgages Note, Security Instrument, Riders, Assignments, etc.

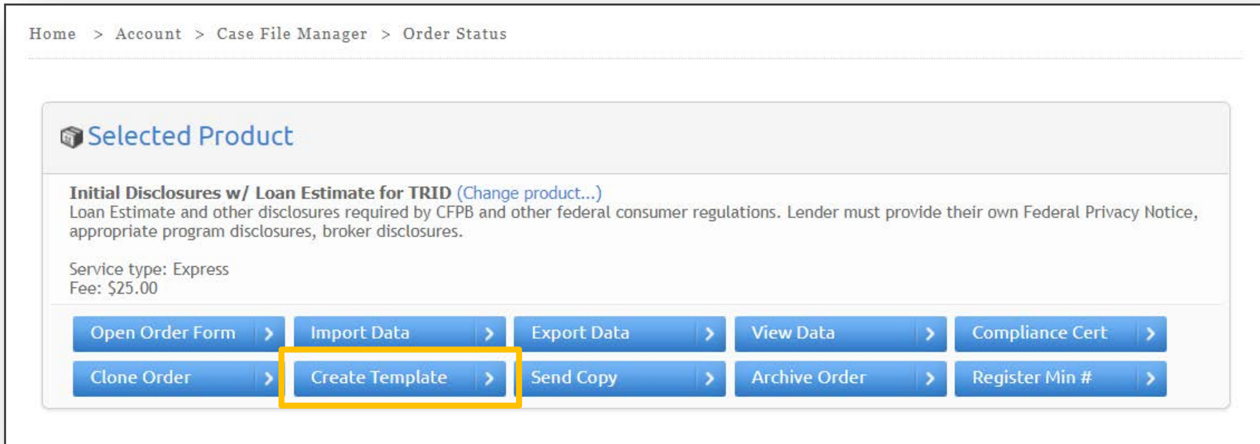
Home Improvement (Primary Residence Only) - Permanent Loan, No Draw Period
Bank loan documents for home improvement transactions. Use only for primary residence. For consumer loans only. Please see Residential Non-Consumer Bank Loan order form for investment property. If loan has a draw period, followed by principal and interest, all in one transaction, use One-Time Closing order form.

Legal Documents Only
This package does not include a Closing Disclosure. Conventional, FHA, or VA Mortgages Note, Security Instrument, Riders, Assignments, etc.

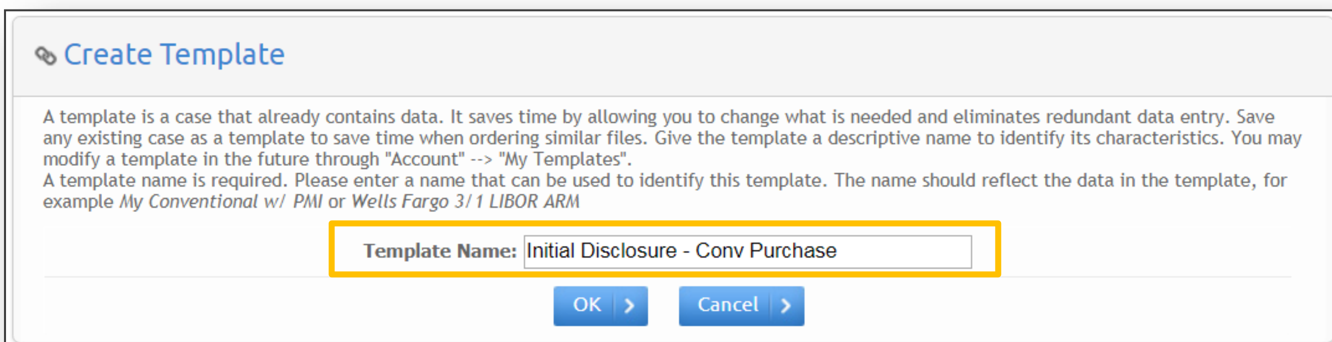
Residential Mortgage
Conventional, FHA, VA or USDA Mortgage documents. Secondary market mortgage forms and support documents provided. Please see Residential Non Consumer Bank Loan order, if purpose is investment property not being sold in secondary market.

Create the Template:

4. After selecting the Order form to use, you'll answer ordering questions to continue to get to the Order Status screen here:



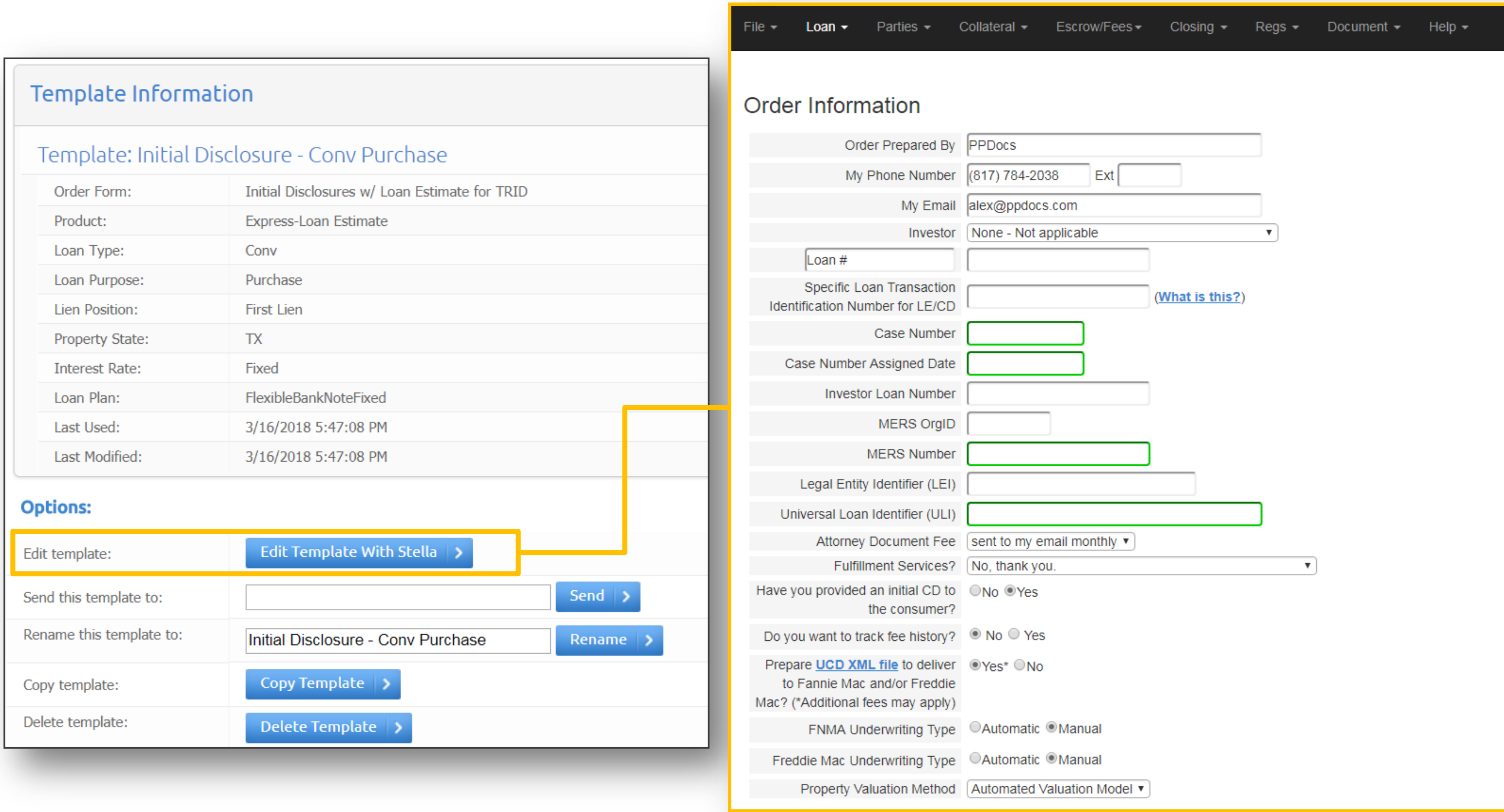
5. Select "Create Template" shown above and Name the Template for the type of loan you want to use and "OK".



March 28, 2018

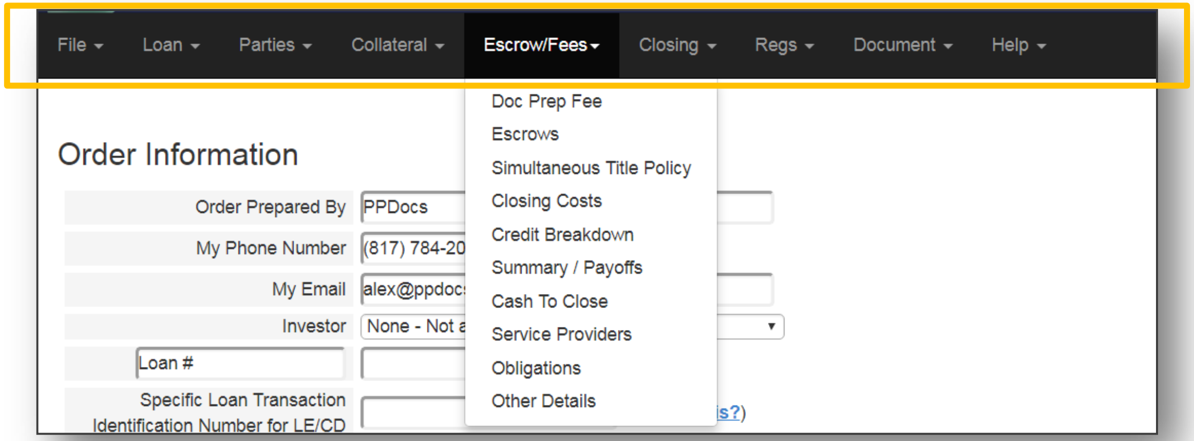
Edit New Template:

6. After you name your new Template, you will be taken to “Edit Template Information”.
7. Here you can select “**Edit Template With Stella**” to start customizing your Template.

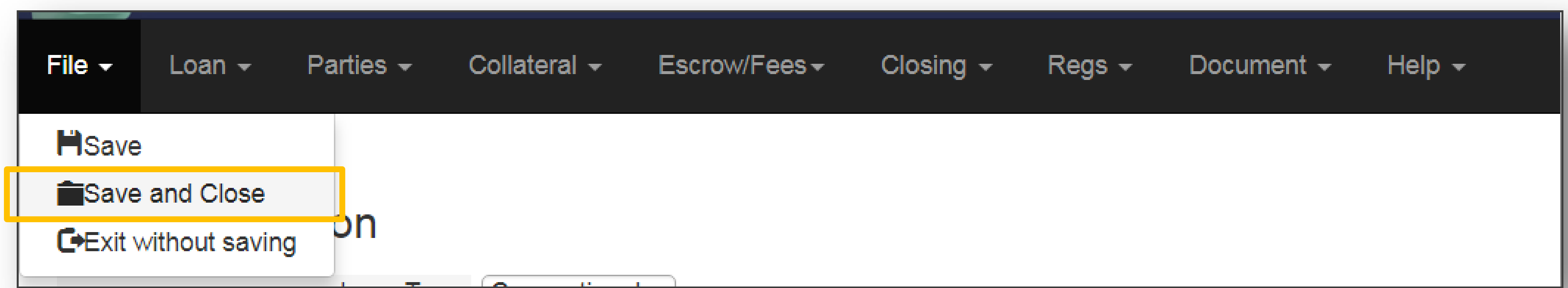


Edit Template with Stella

8. Unlike the regular Order Form, Stella allows you to jump from one section to another without required fields.
   - You're able to input common fees, loan type, Investor, loan plan, etc.
   - Review each field in the drop downs listed here for all adjustments.

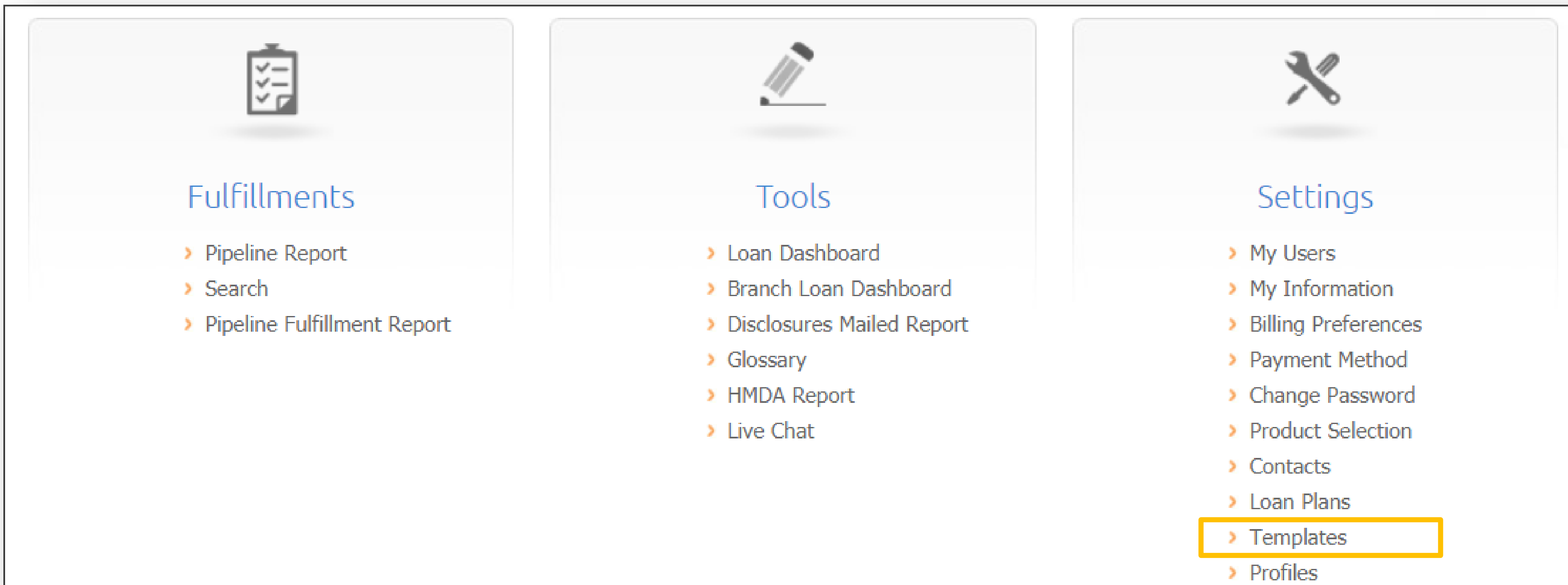


9. When you've completed all your changes, "Save and Close" under the "File" and you'll be taken back to the previous "Edit Template Information page.



Where are my Templates?:

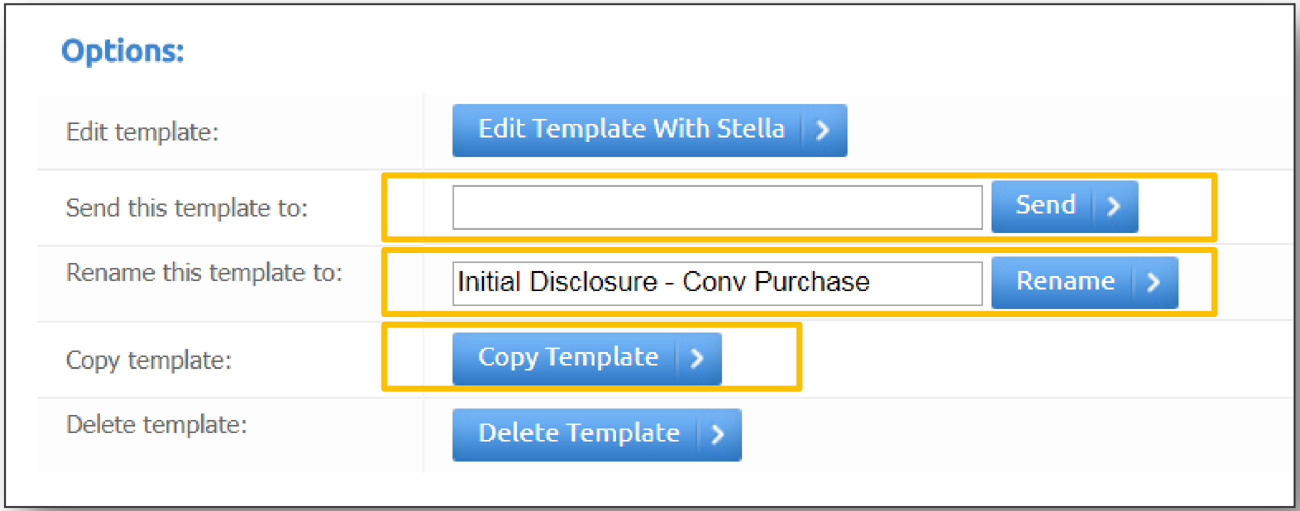
- You will always have access to your Templates in your Account screen under “Settings”
  - Here you can Edit, Send, Copy, or Rename your Templates



Send, Copy, or Rename:

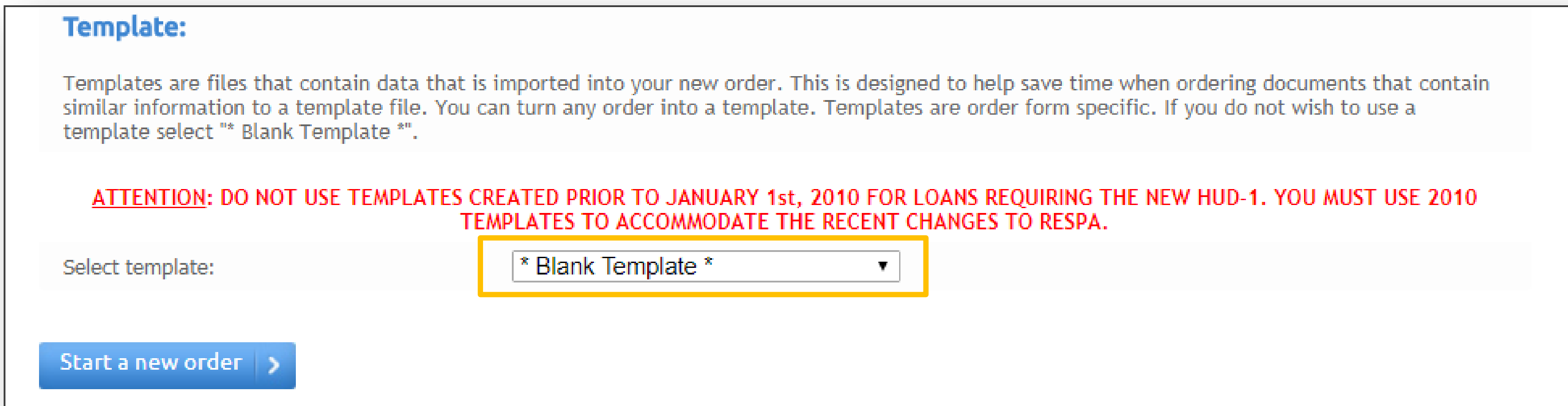
At any point, you're able to Edit your Templates by going into your Templates under "Settings" and choosing the Template Name you want to update including the following:

1. Send:
   - You're able to send templates to anyone that is registered with PPDocs. They will receive the template in their Templates section and can be used for new orders immediately.
2. Rename:
   - Your template can be renamed at any time.
3. Copy:
   - If you Copy a template, this allows you to create another Template without starting from scratch. You will change all the information needed for the copied template (i.e. purchase to refinance)



Where will I choose my Templates?

Depending on the Order form you choose, your templates will be located in a Drop Down Menu shown below after you've selected your order form and answer subsequent questions:



Please let us know if you have additional questions or concerns.

Please contact support@ppdocs.com if additional assistance is needed.

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