



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”

The screenshot displays a grid of six menu categories in the PPDocs system:

- Documents and Disclosures** (document icon):
 - › Casefile Manager
 - › Search
 - › Start a new order
- eDisclosures (e-Sign)** (document with pencil icon):
 - › eSign Manager
 - › Send New eSign Package
 - › eDisclosure Manager
- eRecording** (microphone icon):
 - › eRecording Manager
 - › Search
 - › Billing Report
- Fulfillments** (clipboard with checkmarks icon):
 - › Pipeline Report
 - › Search
 - › Pipeline Fulfillment Report
- Tools** (pencil icon):
 - › Loan Dashboard
 - › Branch Loan Dashboard
 - › Disclosures Mailed Report
 - › Glossary
 - › HMDA Report
 - › Live Chat
- Settings** (wrench and screwdriver icon):
 - › My Users
 - › My Information
 - › Billing Preferences
 - › Payment Method
 - › Change Password
 - › Product Selection
 - › Contacts
 - › Loan Plans
 - › Templates
 - › Profiles

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

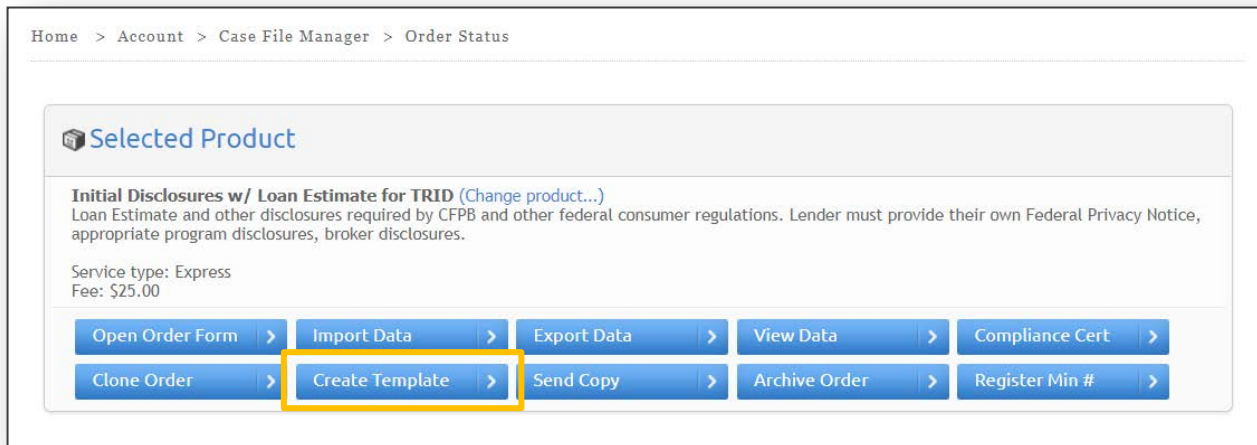
- [Closing Disclosure ONLY for TRID](#)
Closing Disclosure and other disclosures required by CFPB and other federal consumer regulations. Lender must provide their own Federal Privacy Notice, appropriate program disclosures, broker disclosures.
- [Loan Estimate ONLY for TRID](#)
Loan Estimate, Identified 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:



Home > Account > Case File Manager > Order Status

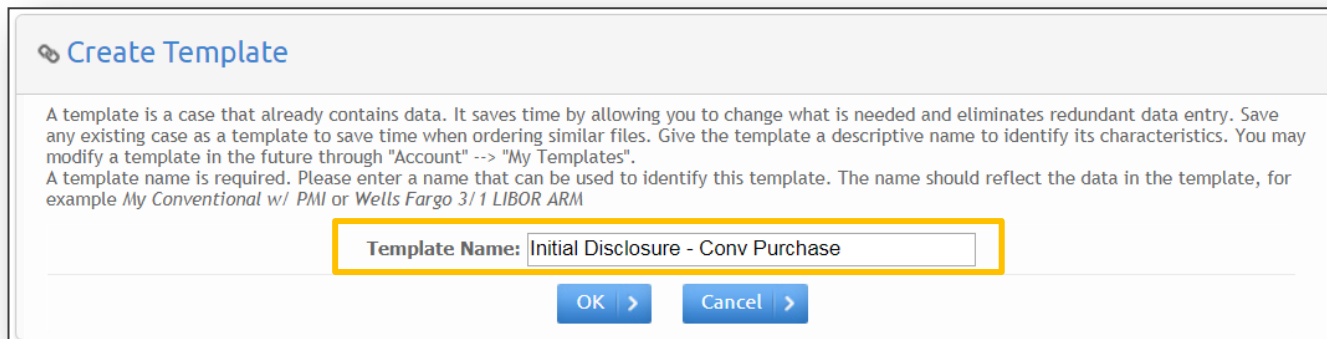
Selected Product

Initial Disclosures w/ Loan Estimate for TRID ([Change product...](#))
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.

Service type: Express
Fee: \$25.00

Open Order Form > Import Data > Export Data > View Data > Compliance Cert >
Clone Order > **Create Template >** Send Copy > Archive Order > Register Min # >

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



Create Template

A template is a case that already contains data. It saves time by allowing you to change what is needed and eliminates redundant data entry. Save any existing case as a template to save time when ordering similar files. Give the template a descriptive name to identify its characteristics. You may modify a template in the future through "Account" --> "My Templates".
A template name is required. Please enter a name that can be used to identify this template. The name should reflect the data in the template, for example *My Conventional w/ PMI or Wells Fargo 3/1 LIBOR ARM*

Template Name:

OK > Cancel >

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.

Template Information

Template: Initial Disclosure - Conv Purchase

Order Form:	Initial Disclosures w/ Loan Estimate for TRID
Product:	Express-Loan Estimate
Loan Type:	Conv
Loan Purpose:	Purchase
Lien Position:	First Lien
Property State:	TX
Interest Rate:	Fixed
Loan Plan:	FlexibleBankNoteFixed
Last Used:	3/16/2018 5:47:08 PM
Last Modified:	3/16/2018 5:47:08 PM

Options:

Edit template:	Edit Template With Stella >
Send this template to:	<input type="text"/> Send >
Rename this template to:	<input type="text" value="Initial Disclosure - Conv Purchase"/> Rename >
Copy template:	Copy Template >
Delete template:	Delete Template >

File ▾ Loan ▾ Parties ▾ Collateral ▾ Escrow/Fees ▾ Closing ▾ Regs ▾ Document ▾ Help ▾

Order Information

Order Prepared By	PPDocs	
My Phone Number	(817) 784-2038	Ext <input type="text"/>
My Email	alex@ppdocs.com	
Investor	None - Not applicable ▾	
Loan #	<input type="text"/>	
Specific Loan Transaction Identification Number for LE/CD	<input type="text"/> (What is this?)	
Case Number	<input style="border: 2px solid green;" type="text"/>	
Case Number Assigned Date	<input style="border: 2px solid green;" type="text"/>	
Investor Loan Number	<input type="text"/>	
MERS OrgID	<input type="text"/>	
MERS Number	<input style="border: 2px solid green;" type="text"/>	
Legal Entity Identifier (LEI)	<input type="text"/>	
Universal Loan Identifier (ULI)	<input style="border: 2px solid green;" type="text"/>	
Attorney Document Fee	sent to my email monthly ▾	
Fulfillment Services?	No, thank you. ▾	
Have you provided an initial CD to the consumer?	<input type="radio"/> No <input checked="" type="radio"/> Yes	
Do you want to track fee history?	<input checked="" type="radio"/> No <input type="radio"/> Yes	
Prepare UCD XML file to deliver to Fannie Mac and/or Freddie Mac? (*Additional fees may apply)	<input checked="" type="radio"/> Yes* <input type="radio"/> No	
FNMA Underwriting Type	<input type="radio"/> Automatic <input checked="" type="radio"/> Manual	
Freddie Mac Underwriting Type	<input type="radio"/> Automatic <input checked="" type="radio"/> Manual	
Property Valuation Method	Automated Valuation Model ▾	

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.

The screenshot shows the Stella application interface. The top navigation bar is highlighted with a yellow border and contains the following menu items: File, Loan, Parties, Collateral, Escrow/Fees, Closing, Regs, Document, and Help. The 'Escrow/Fees' dropdown menu is open, displaying a list of options: Doc Prep Fee, Escrows, Simultaneous Title Policy, Closing Costs, Credit Breakdown, Summary / Payoffs, Cash To Close, Service Providers, Obligations, and Other Details. Below the navigation bar, the 'Order Information' section is visible, containing fields for Order Prepared By (PPDocs), My Phone Number ((817) 784-20...), My Email (alex@ppdoc...), Investor (None - Not a...), Loan #, and Specific Loan Transaction Identification Number for LE/CD.

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.

The screenshot shows the Stella application interface with the 'File' dropdown menu open. The menu items are: Save, Save and Close, and Exit without saving. The 'Save and Close' option is highlighted with a yellow border. The background shows the top navigation bar with the following menu items: File, Loan, Parties, Collateral, Escrow/Fees, Closing, Regs, Document, and Help.

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



Fulfillments

- › Pipeline Report
- › Search
- › Pipeline Fulfillment Report



Tools

- › Loan Dashboard
- › Branch Loan Dashboard
- › Disclosures Mailed Report
- › Glossary
- › HMDA Report
- › Live Chat



Settings

- › My Users
- › My Information
- › Billing Preferences
- › Payment Method
- › Change Password
- › Product Selection
- › Contacts
- › Loan Plans
- › **Templates**
- › Profiles

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)

Options:

Edit template:	Edit Template With Stella >
Send this template to:	<input type="text"/> Send >
Rename this template to:	<input type="text" value="Initial Disclosure - Conv Purchase"/> Rename >
Copy template:	Copy Template >
Delete template:	Delete Template >

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:

Template:

Templates are files that contain data that is imported into your new order. This is designed to help save time when ordering documents that contain similar information to a template file. You can turn any order into a template. Templates are order form specific. If you do not wish to use a template select *** Blank Template ***.

ATTENTION: DO NOT USE TEMPLATES CREATED PRIOR TO JANUARY 1st, 2010 FOR LOANS REQUIRING THE NEW HUD-1. YOU MUST USE 2010 TEMPLATES TO ACCOMMODATE THE RECENT CHANGES TO RESPA.

Select template:

[Start a new order >](#)

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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