

# Adding and Editing a Template

## ADDING A NEW TEMPLATE:

Login to your Casefile Manager and Start a new order

The screenshot displays the 'ACCOUNT' page for a user named Gail Knight. The page is organized into several functional categories, each with a list of links. The 'Documents and Disclosures' category is highlighted with a red circle around the 'Start a new order' link.

**ACCOUNT** ORDERING GUIDES

Good morning, Gail Knight

- Documents and Disclosures**
  - > Casefile Manager Search
  - > **Start a new order**
- eDisclosure (e-Sign)**
  - > eDisclosure Manager
  - > Send New eDisclosure
- eRecording**
  - > eRecording Manager
  - > Search
  - > Billing Report
- Fulfillments**
  - > Pipeline Report
  - > Search
  - > Pipeline Fulfillment Report
- Tools**
  - > Loan Dashboard
  - > Glossary
  - > Live Chat
- Settings**
  - > Registration Information
  - > Change Password
  - > Product Display Settings
  - > My Contacts
  - > My Loan Plans
  - > My Templates
  - > My Profiles

**Footer:**

- FAQ
- Fee Matrix
- Disclosure Matrix
- Calculators
- Loan Ordering Step By Step
- Glossary
- User Agreement
- Warranty
- Send P&P an Instant Message
- Share this page
  - Refer a friend
  - Contact us
- Stay connected
  - Facebook
  - Twitter

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## Select the order form for which you would like to create a template

Home > Account > Case File Manager > Select Order Form

### Select Order Form

Displaying order forms for TX. Other states are available.

This list of order forms can be customized to suit your needs.

#### APPLICATION / PRE CLOSING ORDER FORMS

- [Initial Disclosures](#)  
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.
- [Aggregate Escrow Analysis](#)  
Calculations and forms to determine RESPA compliant starting balance for a loan closing.
- [Home Equity Line of Credit Disclosures](#)  
Home Equity Line of Credit Disclosures and other required documents.

#### SPECIALTY ORDER FORMS

- [Misc Document Review](#)  
Initiate a request for review of POA, Trust, land lease, or full closing package. Upload documents for review.
- [Loan Estimate ONLY for the TILA-RESPA Integrated Disclosure](#)  
Loan Estimate, Identified Service Provider List, and addendum (if applicable)
- [Closing Disclosure ONLY for the TILA-RESPA Integrated Disclosures](#)  
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.
- [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.

#### CLOSING ORDER FORMS

- [Legal Documents Only](#)  
This package does not include a TIL. Conventional, FHA, or VA Mortgages Note, Security Instrument, Riders, Assignments, etc.
- [Legal Documents with TIL](#)  
Conventional, FHA, or VA Mortgages Note, Security Instrument, Riders, Assignments, etc.
- [Residential Mortgage](#)  
Conventional, FHA, or VA 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.
- [Residential Non-Consumer Bank Loan \(Investment Property\) - RESPA DOES NOT APPLY \(Closing statement given - NOT HUD-1\)](#)  
Flexible Bank loan documents. A TIL is not required for investment - business, agricultural or commercial transaction unless loan is used for personal, family, household purposes...then the new TIL format and GFE are required (use Residential Consumer Bank Loan Order form). If order is for 2nd home use the Residential Mortgage or Residential Consumer Bank Loan order form.
- [Residential Consumer Bank Loan](#)  
Flexible Bank loan documents for loans not usually sold in secondary market i.e. true daily earnings computation. Also used for home improvements, vacation property and 2nd homes.
- [Texas Home Equity \(Closed End\)](#)  
Closed-end Texas home equity loan documents - primary residence only.

Click "Create Template"

The screenshot shows the ppdocs,inc website interface. At the top, there is a navigation menu with links for Home, Services, Resources, FAQ, News, Contact, and Account. Below the navigation, a breadcrumb trail reads: Home > Account > Case File Manager > Order Status. The main content area is divided into several sections:

- Selected Product:** This section displays the product name "Initial Disclosures w/ Loan Estimate for TRID (Change product...)" and a brief description. Below the description, there are two rows of buttons: "Open Order Form", "Import Data", "Export Data", "View Data", and "Compliance Cert" in the first row; "Clone Order", "Create Template", "Send Copy", and "Archive Order" in the second row. The "Create Template" button is highlighted with a red circle.
- Collaboration Powered by TRIDShare™:** This section provides information about collaborating with settlement professionals. It includes a "Continue..." link at the bottom.
- Attachments:** This section features a table with columns for Attachment, Tag, Size, Date, and Option. An "ADD NEW ATTACHMENT" button is located at the top right of this section.
- Comments:** This section features a table with columns for Description and Date. An "ADD NEW COMMENT" button is located at the top right of this section.

Name the template and click "ok"

The screenshot shows the ppdocs,inc web application interface. At the top, there is a navigation bar with the company logo, a search bar, and links for 'Download Documents', 'Logout', and a search icon. Below the navigation bar is a main menu with links for 'Home', 'Services', 'Resources', 'FAQ', 'News', 'Contact', and 'Account'. The background image shows a person in a suit reviewing documents. A modal dialog box is open in the foreground, titled 'Create Template'. The dialog contains instructions on how to create a template and a text input field for the 'Template Name'. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

Home > Account > Case File Manager > Order Status

### 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 >

Click “edit template” and begin entering as much information that will apply each time this template is used.

The screenshot shows the 'ppdocs,inc' website interface. The top navigation bar includes links for Home, Services, Resources, FAQ, News, Contact, and Account. The main content area is titled 'Edit Template Information' and displays the following details for the 'gknight' template:

Order Form:	Residential Consumer Bank Loan
Product:	Full Svc.-Consumer Bank Loan (1st or 2nd) - TRID
Loan Type:	Conv
Loan Purpose:	Purchase
Lien Position:	First Lien
Property State:	TX
Interest Rate:	Fixed
Loan Plan:	FlexibleBankNoteFixed
Last Used:	9/17/2015 10:38:47 AM
Last Modified:	9/17/2015 10:38:47 AM

Below the table, there is an 'Options:' section with several actions:

- Edit template: **Edit Template** >
- Send this template to:  **Send** >
- Rename this template to:  **Rename** >
- Copy template: **Copy Template** >
- Delete template: **Delete Template** >

The 'Edit Template' button is circled in red. At the bottom of the page, there are links for FAQ, Fee Matrix, Disclosure Matrix, Calculators, Loan Ordering Step By Step, Glossary, User Agreement, Warranty, Send P&P an Instant Message, Share this page, Refer a friend, Contact us, and Stay connected (with Facebook and Twitter icons).

Once you have entered all the information you want included in the template, click “close”.

## EDITING AN EXISTING TEMPLATE:

From the Account screen, Select "My Templates"

The screenshot displays the PPDocs, Inc. Account page. The top navigation bar includes links for Home, Services, Resources, FAQ, News, Contact, and Account. The main content area is titled 'ACCOUNT' and features a greeting: 'Good afternoon, Gail Knight'. Below this, there are six main sections: Documents and Disclosures, eDisclosure (e-Sign), eRecording, Fulfillments, Tools, and Settings. The 'Settings' section is circled in red, and within it, the 'My Templates' link is highlighted. The footer contains various utility links and social media icons.

Download Documents Logout Search...

Home Services Resources FAQ News Contact Account

Home > Account

ACCOUNT ORDERING GUIDES

Good afternoon, Gail Knight

**Documents and Disclosures**

- Casefile Manager
- Search
- Start a new order

**eDisclosure (e-Sign)**

- eDisclosure Manager
- Send New eDisclosure

**eRecording**

- eRecording Manager
- Search
- Billing Report

**Fulfillments**

- Pipeline Report
- Search
- Pipeline Fulfillment Report

**Tools**

- Loan Dashboard
- Glossary
- Live Chat

**Settings**

- Registration Information
- Change Password
- Product Display Settings
- My Contacts
- My Loan Plans
- My Templates**
- My Profiles

FAQ Fee Matrix Disclosure Matrix Calculators Loan Ordering Step By Step Glossary User Agreement Warranty Send P&P an Instant Message

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Click on template name you wish to edit then click "Edit Template"

**Options:**

Edit template:	<a href="#">Edit Template &gt;</a>
Send this template to:	<input type="text"/> <a href="#">Send &gt;</a>
Rename this template to:	<input type="text" value="LE w/disclosures"/> <a href="#">Rename &gt;</a>
Copy template:	<a href="#">Copy Template &gt;</a>
Delete template:	<a href="#">Delete Template &gt;</a>

Make any necessary changes throughout the screens then click Save and Close.