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How to collaborate with your Settlement Agents
Updated 09/01/2015

1. Visit our PPDocs.com/TRID and click on Test Collaboration with Your Settlement Agents:

   Tools and Calculators
   > Interactive Calendar
   > Baseline Certification
   > Title Insurance Calculator
   > Test Collaboration with Your
   Settlement Agents

2. You will see some information regarding how we will perform the testing with your settlement agents. You will only see this once. Please be sure to read and click the link at the bottom to begin testing.

3. Here you will see a list of Settlement Agents in your Contact Rolodex. Click on Create Test File and Send Invitation button next to the settlement agent you would like to initiate a collaboration:

   test
   2280 Somestreet
   Fort Worth, TX 76017
   Contact: Jerry Bribiesca
   Phone: (817) 694-9375
   Email: bribiesca@gmail.com

   CREATE TEST FILE AND SEND INVITATION

4. Have us send the email on your behalf, or look at the email and send it from your favorite email client. You may click on the email address listed and we will open up an email where you can copy and paste the email.

   ## Have us send the email for you!

   Click on the button below to send the Settlement Agent an email to start testing collaboration.

   Send Now

   ## Want to see or send the information on your own?

   Below you will find an email we have generated specifically for the settlement agent you selected to start testing with. Please copy and paste the highlighted text to your favorite email client and send the email to bribiesca@gmail.com.
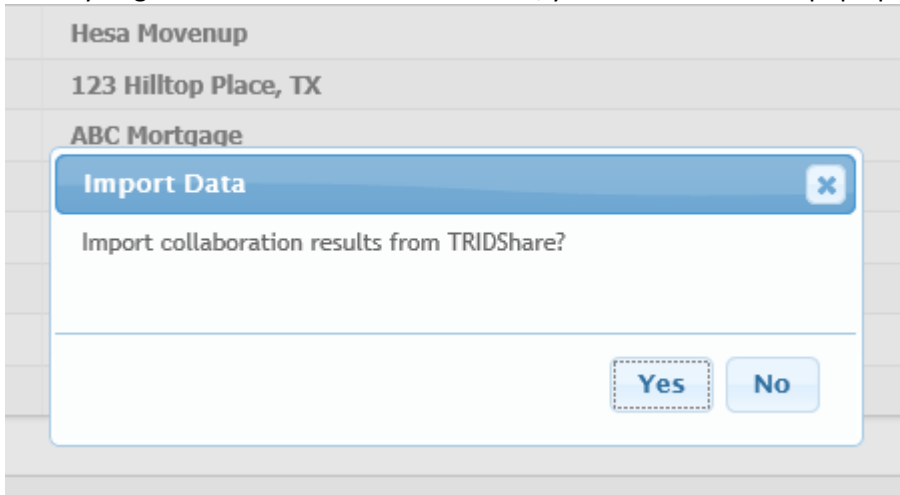   **This email is unique to each settlement agent you are testing with.**

   Now we wait on the Settlement Agent to respond to the collaboration.

5. Once the Settlement Agent has responded, you will receive an email letting you know there has been updates to the file. Click on the link to review the changes
6. Accept or Reject the Settlement Agent's proposed changes:

Review Changes

By	Date	Field	Old Value	New Value	Reject All	Accept All
Jerry Title	9/1/2015 7:15:00 AM	Section H line 07 Seller at closing amount	5400.00	5,600.00	Reject	Accept
Jerry Title	9/1/2015 7:15:00 AM	Section H line 09 Seller at closing amount	10.00	20.00	Reject	Accept
Jerry Title	9/1/2015 7:15:00 AM	Section H line 14 Borrower at closing amount	40.00	60.00	Reject	Accept
Jerry Title	9/1/2015 7:15:00 AM	Section H line 01 Seller at closing amount	200.00	225.00	Reject	Accept
Jerry Title	9/1/2015 7:15:00 AM	Section B line 10 Seller at closing amount	250.00	275.00	Reject	Accept
Jerry Title	9/1/2015 7:15:00 AM	Section B line 10 Borrower at closing amount	250.00	275.00	Reject	Accept

7. When you go back to the loan within PPDocs, you will notice a new pop up:

Hesa Movenup

123 Hilltop Place, TX

ABC Mortgage

Import Data ✖

Import collaboration results from TRIDShare?

Yes No

Click on Yes to import the accepted or rejected changes into the loan file.