Guide to Ordering Closing Documents
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The first step in ordering with PPDocs.com is having a login. If you are new to our site and have any questions on how to order or obtaining a login please contact our Sales Manager, Dallas Rivera at 817.784.2032 or dallas@ppdocs.com.
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Once you have successfully logged in you can now access the order forms. There are three methods to starting an order form for a closing package:

1. You ordered your initial disclosures with the PPDocs system, now you have a clear to close.
   - After you submit an initial disclosure order an “Order Final Docs” button will automatically appear for when you are ready to go to closing.
   - Click this button and all your previously entered information will pull into the closing order form.
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2. You ordered your initial disclosures with your Loan Origination System (LOS) and want to import the information.
   - Process for import varies depending on the type of system you use – contact your service provider for more detailed instructions on how to successfully import data to the PPDocs system
   - If you are unsure if we have an import with your LOS, please contact us for more information 817.461.5500.
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3. Starting an order without importing or using a previous Initial Disclosure order form. This will be a blank order form which you must complete all the data entry.

- Log on to PPDocs.com – Click Account at the top left
- Under Loan Documents select “Start a new order” then choose the property state
- Choose the appropriate closing order form (i.e. Residential Mortgage, One-Time Closing, Lot/Land Only Loan, etc.)
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After selecting the appropriate order form answer the question regarding what form of estimate was provided.

- Loan Estimate – For testing purposes only before August 1, 2015
- GFE – Most commonly used, for any loan subject to RESPA
- None – For any loan that does not require a GFE, not subject to RESPA
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Once you have selected the correct Closing Order Form select the appropriate service type.

- **Express Service** – This service includes built in audit and analyses. Express products generate documents based on the lender’s data entry, there aren’t any second checks by PPDocs DocPrep Team. Once submitted documents produce in a matter of seconds.
- **Full Service** – Along with the built in audits and analyses, PPDocs DocPrep Team will review the Title Commitment schedule A, B and C, survey and GFE to ensure no data entry errors. Since there is a review process, document turnaround time is about an hour.

Click ORDER
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After an order has been started, click the open order form button under Selected Product to continue to the order form to enter or modify data.
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**Remember:**

- Any field in **YELLOW** is required to move forward.

- Every field outlined in **GREEN** is an F2 function – click inside the field and hit F2 to have certain fields auto populate or additional tools made visible.

- There is helpful tools box located at the bottom left corner of every screen in the order form.

- Use the “Back” and “Next” navigation buttons to move through the order form.
Audit results give you the details on our analysis through on the information provided. Please note the initial disclosures are an express product and will not be reviewed by our DocPrep group. Please make sure that you fully understand the audits that are displayed before acknowledging them. As always, if you have any questions you may contact us for assistance in filling in the fields.
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There are several different types of audits that we are looking for you to either acknowledge by checking the box next to the audit or go back to the appropriate screen to fix:

**X** – The red “x” will not let you move forward. Continuing with this error is detrimental to your loan. Please correct to move forward.

**Red** – Acknowledgeable red audit means this is a critical audit. You can still move forward but do so with caution.

**Orange** – Acknowledgeable orange audit means there are some unexpected errors or something is not typical. Most of the orange audits are investor driven.

**Green** – Not acknowledgeable. Informing you that the following audits have passed.

Always be informed of the audits that are presented to you before you acknowledge them. Just because you see an audit, it doesn’t necessarily mean that something is incorrect. Please visit with us with any questions you have on your audit results.
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After completing the screens and acknowledging all audit, select the due time for the documents and any additional notes you have to PPDocs. Please do not forget to include the email address(es) of the parties that need to receive the completed doc package for review.
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Click the green “submit full service request” to submit the order to PPDocs DocPrep Department.
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We must have at least your title commitment / title search before we can begin to work on your file. Please also send your survey if applicable and GFE.

Delivery options:
Fax support documents to: 1-800-216-3105
Upload directly to the file within the website – once you have submitted the file, scroll toward the bottom of the Loan Information screen to upload directly from your desk top.