

We are introducing a new feature in the order form.

Most of the time, lenders have things that are the same across all loans, such as their barcode preferences, their MERS organization ID, etc.

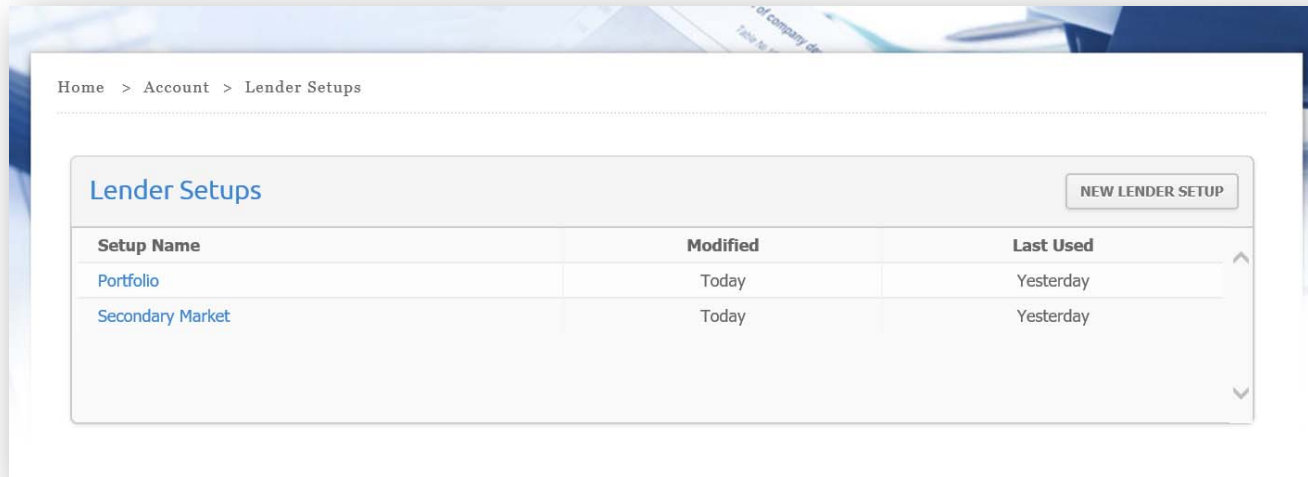
We now have a new section under the account screen for **Lender Setups**

ACCOUNT ORDERING GUIDES

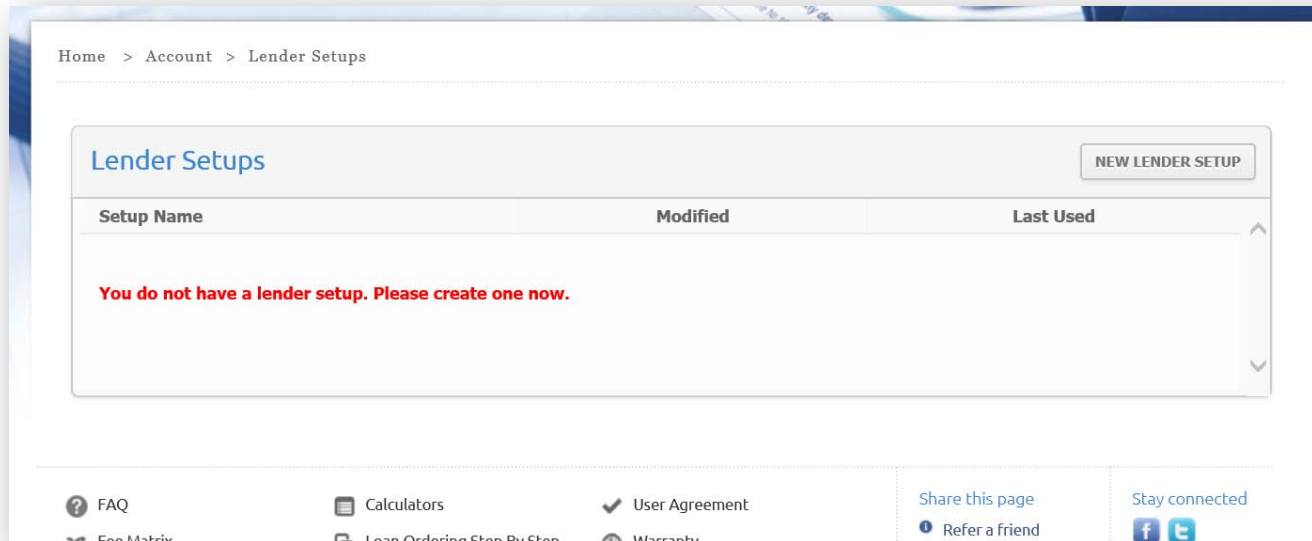
Good evening, Samantha Adkins

- Documents and Disclosures**
 - › Casefile Manager
 - › Search
 - › Start a new order
- eDisclosures (e-Sign)**
 - › eSign Manager
 - › Send New eSign Package
- eRecording**
 - › eRecording Manager
 - › Search
- Billing**
 - › Billing Preferences
 - › Pending Charges
 - › Payment Method
- Tools**
 - › Pipeline Report
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 - › Release Notes
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 - › Disclosures Mailed Report
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 - › HMDA Report
- Settings**
 - › My Users
 - › My Information
 - › Change Password
 - › Product Selection
 - › Contacts
 - › Loan Plans
 - › Templates
 - › Profiles
 - › Lender Setups

This will take you to a list of your Lender Setups



If you do not have any Lender Setups, you will be prompted to make a new one. These are not required.



You can click on the individual lender setup to edit, rename, send to someone else, etc.

Home > Account > Lender Setups > Edit Lender Setup Information

Portfolio

Options:

Edit setup:	Edit >
Clone setup:	Clone >
Send this setup to:	<input type="text"/> Send to >
Rename this setup to:	<input type="text" value="Portfolio"/> Rename >
Delete	Delete >

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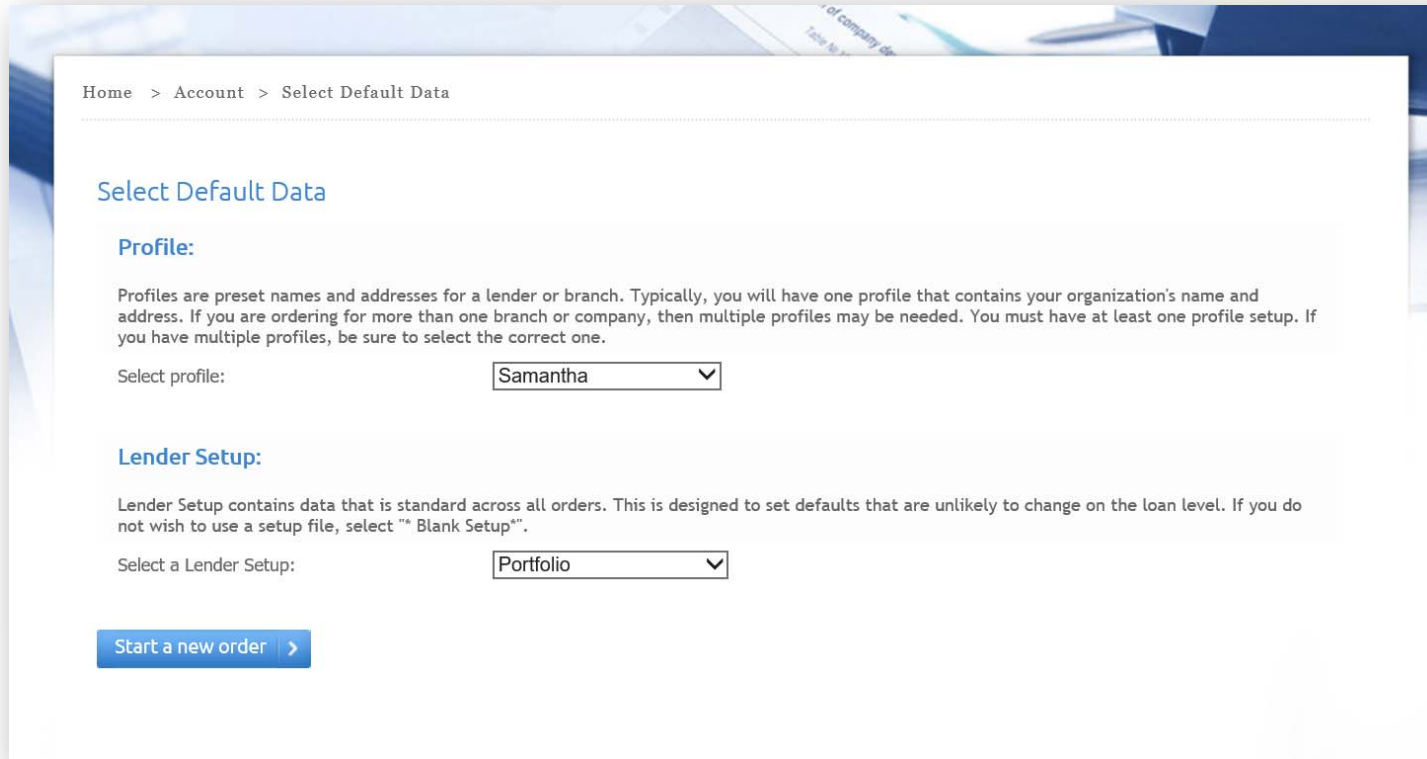
Click the Edit button to edit the fields. The editor has the fields that we will default when you start a new order. Fields do not have to be completed, unless there is a dropdown list and there is no blank option.

Home > Account > Lender Setups > Edit Lender Setup

Lender Setup

MERS OrgID	<input type="text" value="1111111"/>
Legal Entity Identifier (LEI)	<input type="text" value="1234567890"/>
Barcode Reference	<input type="text" value="Loan # DocID Date"/>
Fulfillment Services?	<input type="text" value="No, thank you."/> <i>Must be setup in advance. Contact Jaime Dusten at 800.800.9975 for more information.</i>
Legal Description:	<input type="text" value="Use Title Commitment Legal Description"/>
Do you want to track fee history?	<input type="text" value="No"/>
Prepare UCD XML file to deliver to Fannie Mae and/or Freddie Mac? (*Additional fees may apply)	<input type="text" value="Yes"/>
FNMA Underwriting Type	<input type="text" value="Automatic"/>
Freddie Mac Underwriting Type	<input type="text" value="Automatic"/>
Property Valuation Method	<input type="text" value="Full Appraisal"/>
Are you a Small Creditor?	<input type="text" value="No"/>
	Small Creditor Defined: Creditor and affiliates together have fewer than 2000 first lien covered transactions during the previous calendar year (not including those held in portfolio by either), and together with its affiliates, has less than \$2,069,000,000 (billion) in assets during the previous calendar year (adjusted annually per CPI).
Are you a Rural and Underserved Area Creditor?	<input type="text" value="Yes"/>
	Rural and Underserved Creditor Defined: Creditor must extend one covered transaction in the preceding year, or in either of the two preceding years for applications received prior to April 1st in a "rural or underserved" area. Additionally, the Creditor must meet Small Creditor definition requirements.
Calculation Method:	<input type="text" value="FHA Connection (Estimated)"/> (What is this?)
Disclose Prepaid Interest using a date range?	<input type="text" value="No"/>
Minimum Late Charge	<input type="text" value="0.00"/>
Maximum Late Charge	<input type="text" value="0.00"/>
Partial Payment	<input type="text" value="May accept payments that are less and apply to loan."/>
Include Signature Lines/Confirm Receipt?	<input type="text" value="No"/>

When you start a new order, if you have a Lender Setup, it will ask you which one, if any, that you want to use. It will be applied after the template and the profile.

The image shows a screenshot of a web application interface. At the top, there is a breadcrumb trail: "Home > Account > Select Default Data". Below this, the main heading is "Select Default Data". The form is divided into two sections: "Profile:" and "Lender Setup:". The "Profile:" section includes a descriptive paragraph and a dropdown menu labeled "Select profile:" with "Samantha" selected. The "Lender Setup:" section includes another descriptive paragraph and a dropdown menu labeled "Select a Lender Setup:" with "Portfolio" selected. At the bottom left, there is a blue button with the text "Start a new order" and a right-pointing arrow.

Home > Account > Select Default Data

Select Default Data

Profile:

Profiles are preset names and addresses for a lender or branch. Typically, you will have one profile that contains your organization's name and address. If you are ordering for more than one branch or company, then multiple profiles may be needed. You must have at least one profile setup. If you have multiple profiles, be sure to select the correct one.

Select profile:

Lender Setup:

Lender Setup contains data that is standard across all orders. This is designed to set defaults that are unlikely to change on the loan level. If you do not wish to use a setup file, select "" Blank Setup"".

Select a Lender Setup:

[Start a new order >](#)

The fields that have been included in the Lender Setup have been moved to a Lender Setup Screen. You have the option to show or hide that screen on the order information screen.

ppdocs,inc Residential Mortgage

Order Information

Order Prepared By: ABC Funder

My Phone Number: (817) 784-2069 Ext 145

My Email: samantha@ppdocs.com

Loan #: 123

Specific Loan Transaction Identification Number for LE/CD: 123 (What is this?)

Investor Loan Number: [Empty]

MERS Number: [Empty]

Universal Loan Identifier (ULI): [Empty]

Property State: TX

Attorney Fee: sent to my email monthly

Barcode Type: [Empty]

Show Lender Information? Yes

Show Lender Profile? No

Hide Lender Setup Fields? Yes

Order Information sidebar: Lender Information (highlighted), Settlement Agent, Real Estate Brokers, Property Information, Borrower(s), Vesting Tool, Loan Information, Disclosure History, Loan Detail, Security Instrument Options, Escrow Account Setup, Simultaneous Issue Title Policy, Closing Cost Details, Credit Breakdown, Tolerance, Summaries of Transactions, Other Details, Section 32 HOEPA, State High Cost Analysis, Additional Docs & Conditions, Req. / Corrections, Hold Harmless, Seller Information, Truth In Lending, Payment Table Preview

ppdocs,inc Residential Mortgage

Order Information

Order Prepared By: ABC Funder

My Phone Number: (817) 784-2069 Ext 145

My Email: samantha@ppdocs.com

Loan #: [Empty]

Specific Loan Transaction Identification Number for LE/CD: [Empty] (What is this?)

Investor Loan Number: [Empty]

MERS Number: [Empty]

Universal Loan Identifier (ULI): [Empty]

Property State: TX

Attorney Fee: [Empty]

Barcode Type: [Empty]

Show Lender Information? Yes

Show Lender Profile? No

Hide Lender Setup Fields? No

Order Information sidebar: Lender Setup (highlighted), Order Information, Settlement Agent, Real Estate Brokers, Property Information, Borrower(s), Vesting Tool, Loan Information, Disclosure History, Loan Detail, Security Instrument Options, Escrow Account Setup, Simultaneous Issue Title Policy, Closing Cost Details, Credit Breakdown, Tolerance, Summaries of Transactions, Other Details, Section 32 HOEPA, State High Cost Analysis, Additional Docs & Conditions, Req. / Corrections, Hold Harmless, Seller Information, Truth In Lending, Payment Table Preview

Fields that are set in the Lender Setups will populate that screen. We recommend showing the screen until you have solid Lender Setups in place.

Borrower: Borrower
Property:
Loan Number: 123

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Lender Setup

- Order Information
- Lender Setup**
- Settlement Agent
- Real Estate Brokers
- Property Information
- Borrower(s)
- Vesting Tool
- Loan Information
- Disclosure History
- Loan Detail
- Security Instrument Options
- Escrow Account Setup
- Simultaneous Issue Title Policy
- Closing Cost Details
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- Section 32 HOEPA
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- Hold Harmless
- Seller Information
- Truth In Lending
- Payment Table Preview
- Document Selection
- Auditor
- Submit Request

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Barcode Reference	<input type="text" value="Loan # DocID Date"/> ▼
Fulfillment Services?	<input type="text" value="No, thank you."/> ▼
Legal Description:	<input type="text" value="Use Title Commitment Legal Description"/> ▼
Do you want to track fee history?	<input type="radio"/> Yes <input checked="" type="radio"/> No
Prepare UCD XML file to deliver to Fannie Mae and/or Freddie Mac? (*Additional fees may apply)	<input checked="" type="radio"/> Yes* <input type="radio"/> No
FNMA Underwriting Type	<input checked="" type="radio"/> Automatic <input type="radio"/> Manual
Freddie Mac Underwriting Type	<input checked="" type="radio"/> Automatic <input type="radio"/> Manual
Property Valuation Method	<input type="text" value="Full Appraisal"/> ▼
Are you a Small Creditor?	<input type="text" value="No"/> ▼
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