



Adding and Editing Templates

You have two options when creating templates –

1. Create from existing files
2. Create a blank template

To create from an existing file -

Go to your DocPrep Orders and click on a file you would like to use as a template for future orders.

Click the three dots in the top right corner and select **Save as Template**.

The screenshot shows a web interface for DocPrep Orders. At the top left, there is a breadcrumb trail: [Home](#) / [Orders](#) / [Order Status](#). The main content area displays a document card for "Borrower Name One". The card includes the following information:

- Borrower Name One**
- Residential Mortgage
- 819 Property Lane, Arlington, AL 76017
- Full Svc.-Conventional, FHA, or VA Package (1st or 2nd Lien) - TRID

At the bottom of the card, there are four buttons: "Open" (with a pencil icon), "View" (with a document icon), a dropdown arrow, and a three-dot menu icon. The three-dot menu is open, showing a context menu with the following options:

- Clone
- Send Copy
- Save As Template
- Archive

Below the menu, the date and time "9/30/2024 10:46:02 AM" are displayed. To the right of the card, there is a "Profile" section with the name "Carrie Goff, CBA" and a "Data Source" section with the value "EncompassNow".





Name your template and click Save -

Save as template

A template can save time by allowing you to change what is needed and eliminates redundant data entry. Save any existing loan as a template for ordering similar loans. Give the template a descriptive name to identify its characteristics. The name should reflect the data in the template, for example *My Conventional w/ PMI* or *Wells Fargo 3/1 LIBOR ARM*

Template Name

[Save](#) [Close](#)

Your templates are stored under **Settings** on the left, then **Templates**

A screenshot of the ppdocs,inc user interface. On the left is a navigation sidebar with sections: Services (DocPrep, Signatures, Closing, Fulfillment, Recordings, UCD), Tools (HMDA Report, Helpful Links, Calculators), and Settings (with 'Settings' highlighted in a red box). The main content area shows the user profile for Carrie Goff (carrie@ppdocs.com) and a list of settings: My Information, Account Credentials, Notifications, Billing, and My Login. On the right is a 'Defaults' sidebar with sections: Lender Setups, Profiles, and Templates (highlighted in a red box), and an 'Admin' section with Users and Investor Settings.



To **apply** a template, start a **New Order**. Either upload a MISMO XML file, or start from scratch-

The "Loan Setup" form is divided into three tabs: "Data Source", "Services", and "Options". The "Data Source" tab is active, showing two options: "Import" (with the subtext "Upload MISMO XML file") and "None" (with the subtext "Start from scratch"). The "None" option is highlighted with a blue background. To the right, under the heading "Starting from Scratch", there are two input fields: "Borrower Name" and "Lender Loan Number", with the value "10092024" entered in the latter.

Select your **Property State** and **Order Form** –

*Note, only templates that apply to that order form will be visible. (i.e. you will not see initial disclosure templates when a closing order form is selected, etc.)

Select the appropriate **Template** –

This form shows three selection steps: "Select Profile" with "Carrie Goff TEST", "Select Lender Setup" with "Carrie's Lender Setup", and "Select Template" with "Residential Mtg TEST". The "Residential Mtg TEST" option is highlighted with a red rectangular border. Below these is a section for "Optional Services (Select any)".



Click **Next** to upload your support documents, then **Next** to continue to the Order Form.

**** To create a template from a blank file -**

(*note, this is handy if you only have a few fields you want to include in your order every time)

Start a **New order**

A screenshot of the "Loan Setup" web interface. At the top, there are three tabs: "Data Source" (selected), "Services", and "Options". Below the tabs, the "Data Source" section has two options: "Import" (with a subtext "Upload MISMO XML file") and "None" (with a subtext "Start from scratch"). The "None" option is highlighted with a blue background. To the right, the "Starting from Scratch" section contains two input fields: "Borrower Name" and "Lender Loan Number" (with the value "10092024" entered).

Select an **order form**. If you want an initial disclosure template, select that order form. If you want a TX Home Equity template, select that order form, etc.

Select the appropriate **Profile** and **Lender Setup**, and None for template.

Click **Next**, then **Done**.

Enter the data you would like to use in your template on every file. Click **Exit**.

Click the three dots in the right corner to save the file as a Template



🏠 / Orders / Order Status

...

Borrower Name
Initial Disclosures w/ Loan Estimate for TRID
TX
Express-Loan Estimate

Loan Number
10092024

Created
10/9/2024 4:43:21 PM

Modified
10/9/2024 4:44:09 PM

Profile
Carrie Goff, CBA

Data Source

[Open](#) [View](#) [...](#)

Editing Templates

To **Edit** a template, go to **Settings > Templates**, and select the template you want to edit.

Click **Open**, make the updates, then **Exit**.

