



Disclosures – Lender prepared & Self prepared

- **Lender prepared**
- Select **Loan Actions**> **Edit Fees Worksheet** from the **Loan Snapshot** page

Loan Snapshot For Ken Customer

Loan Actions (321041) LNID: 321041		Loan Status: Origination Lock Status: Float Approved	Channel: Wholesale Lock Exp:	Rate: 7.375 % APR: 7.536 %	DTI: 19.653 % HCLTV: 88.235 % Score: 800
Homepage Pipeline Summary Loan Snapshot Loan History Loan Info Loan Contacts Edit 1003 Edit Fees Worksheet Request Documents Edit TIL Edit 1008 Price / Lock Fee Sheet HMDA Update Loan Export Loan Cancel Loan Processing Submit to Processor Upload Documents Send DocLink Request Order Credit Submit to Lender Closing Request Order Appraisal Merge Liabilities Fraud Filter Flood Certification Submit To Doc Provider Compliance Services		Subject Property 123 Main Haralson, GA 30229			
		15/2024	Application Date:	10/15/2024 (TRID2)(URLA 2020)	
		0,000.00	Lender Loan#:	321565	
		0,000.00	Published Docs History		
		0,000.00	Term:	360	
		75%	Current APR:	7.536	
		v Fix 30			
		112.03			
		chase			
			%:	n/a	
		ary			
		826%	Bottom:	19.653%	
		235% / 88.235%	HCLTV:	88.235%	
		mination	Closing:	12/6/2024	
		t Approved	Exp:		
		543300003210410			

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- Select the appropriate **Closing Cost Scenario** and **Apply Scenario**

Choose a Closing Cost Scenario ×

The Closing Cost Scenario populates a template of fees for this loan defined by the administrator.

- Non-Del With Docs
- Non-Del With Docs - LA
- Non-Del With Docs - TX
- Non-Del Without Docs
- Wholesale Fees In
- Wholesale Fees In - TX
- Wholesale Fees Out
- Wholesale Fees Out - LA
- Wholesale Fees Out - TX

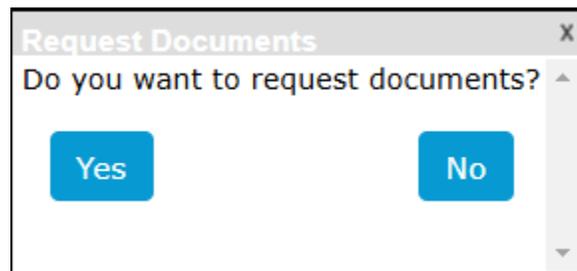
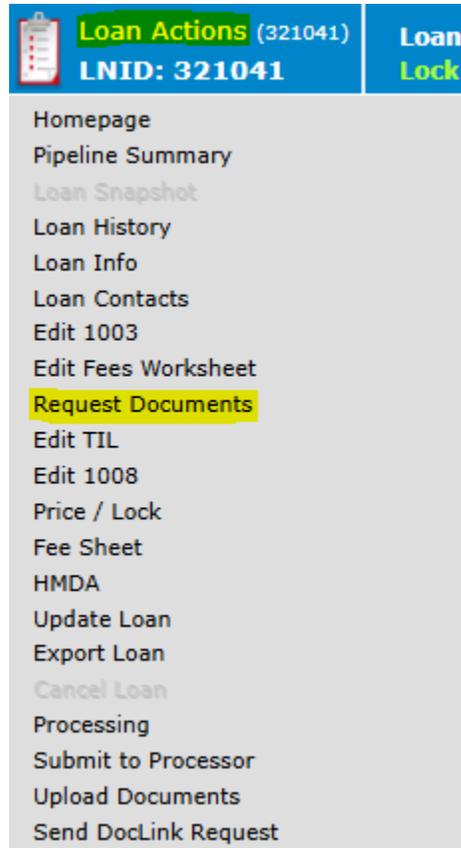
Apply Scenario Cancel

- Scroll down and edit/ add fees for all sections **A.** through **L.**
 - To continue working on the fee sheet select **Save**
 - To continue to disclosure select **Save and Return to Loan Snapshot**
 - To preview your fee sheet select **Print Preview**

Save Save and Return to Loan Snapshot Print Preview

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- Select **Loan Actions**> **Request Documents**
 - Followed by a pop-up window to confirm **Yes**
***** Disclosures will be sent within 24 hours*****



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- **Self prepared**
- Select **Loan Actions**> **Submit to Doc Provider**

	Loan Actions (321041) LNID: 321041	Loan Lock
Homepage		
Pipeline Summary		
Loan Snapshot		
Loan History		
Loan Info		
Loan Contacts		
Edit 1003		
Edit Fees Worksheet		
Request Documents		
Edit TIL		
Edit 1008		
Price / Lock		
Fee Sheet		
HMDA		
Update Loan		
Export Loan		
Cancel Loan		
Processing		
Submit to Processor		
Upload Documents		
Send DocLink Request		
Order Credit		
Submit to Lender		
Closing Request		
Order Appraisal		
Merge Liabilities		
Fraud Filter		
Flood Certification		
Submit To Doc Provider		
Compliance		
Services		

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- Change **Package Type** from: **Initial Disclosures with eDisclose & eSign** to: **Initial Disclosures Review**
- Select **Audit**
 - Any **Fatal Errors** must be corrected prior to disclosure
- Select **Process** and your Disclosure set will download into the **e-DOC MANAGER** for you to preview prior to sending to borrower(s)

Document Provider: DSI Documents

Package Type: Initial Disclosures - Review

Websheet Number: 321041

Document Alternate Language: ▼

Manually enter credentials?

User Name: rcldenney@cmtgfunding.com

Last Audit Result: None
Last Process Result: None

Submissions can take a minute to process. Please be patient.

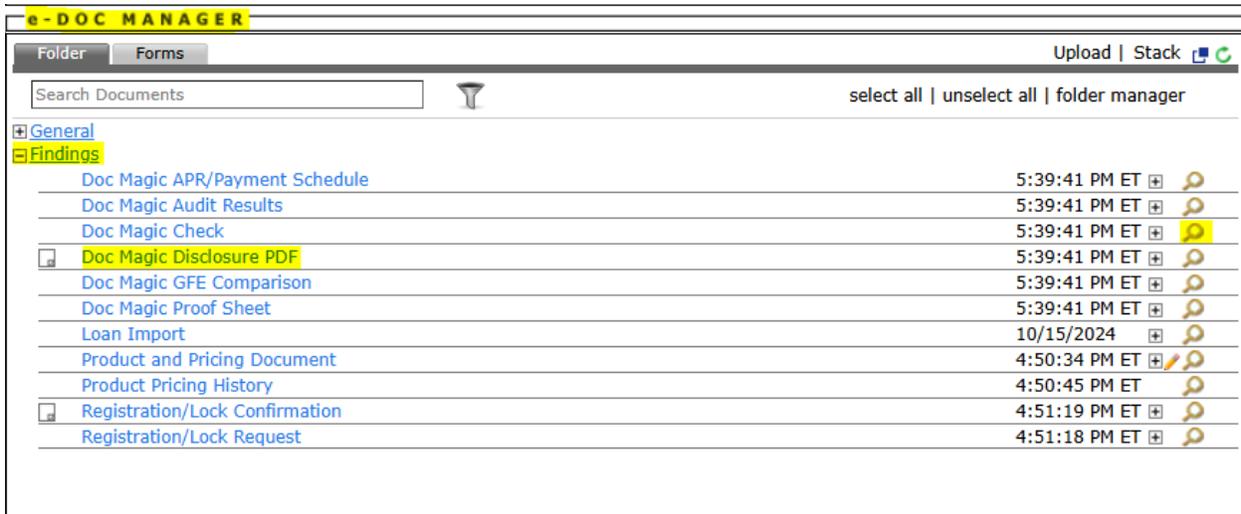
Audit
Process
Cancel

Page	OpenClose Error Description. Fix the following in order to select Audit or Process	Link To Page

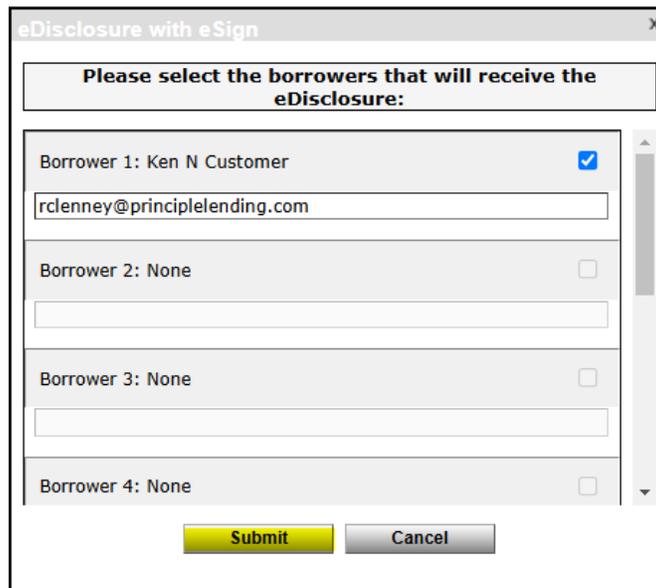
Close

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- Select the magnifying glass to view the disclosure set. You know it's not a live disclosure set when there is a watermark of "Preview" on all pages of the disclosures.



- To send live disclosures you will complete the previous steps again.
- **Loan Actions> Submit to Doc Provider**
- Leave the Package Type defaulted to **Initial Disclosures with eDisclose & eSign**
- Select **Process**
- Select **Submit**

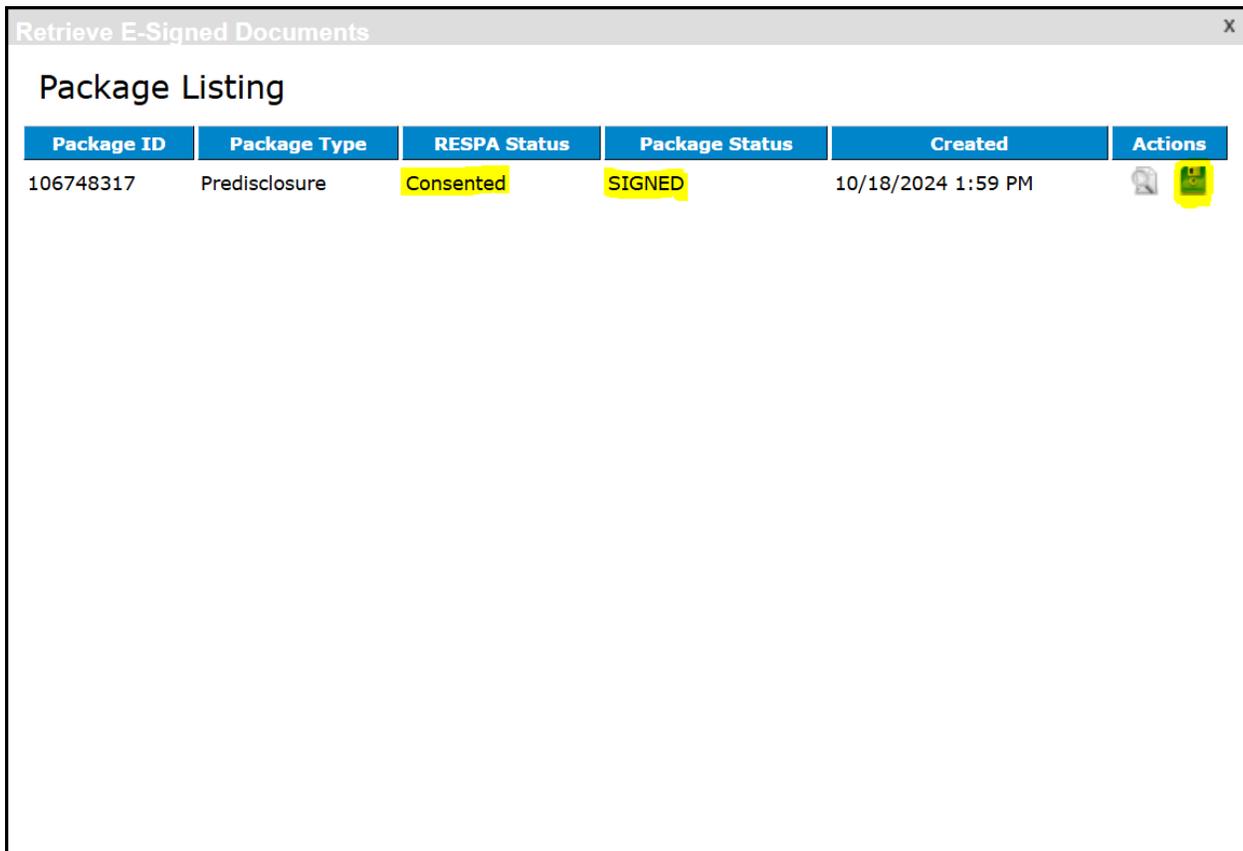


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LO does not have to sign any disclosures.

- Once borrower(s) have completed e-signing, complete the following steps
 - **Loan Actions**> **Submit to Doc Provider**
 - Change **Package Type** to: **Retrieve E-Signed Documents**
 - **Process**
 - If package status is **Consented / Signed** then proceed to **Save** the disclosures by selecting the **Blue** floppy disc out to the right
 - Any other status the borrower(s) will need to complete signing

***Never resend a disclosure set. Instead request the **Disclosure Desk** to resend the DocMagic link by emailing the request to: disclosures@principlelending.com ***



The screenshot shows a web application window titled "Retrieve E-Signed Documents" with a close button (X) in the top right corner. Below the title bar, the heading "Package Listing" is displayed. A table with the following columns is shown: Package ID, Package Type, RESPA Status, Package Status, Created, and Actions. The table contains one row of data: Package ID 106748317, Package Type Predisclosure, RESPA Status Consented, Package Status SIGNED, Created 10/18/2024 1:59 PM, and Actions with two icons (a floppy disk and a document).

Package ID	Package Type	RESPA Status	Package Status	Created	Actions
106748317	Predislosure	Consented	SIGNED	10/18/2024 1:59 PM	 