

# Sending Documents

To email documents:

1. Open a loan and select the **Documents** activity.

ProductionLockComplianceConditionsDocumentsInterfacesMessages

ListDeleted

Loan Number: 817550379Borrower: Alice FirstimerLock Status: Not LockedLock Expiration:

Show Active Only☐

Show Filled Stacking Order Only☐

Stacking Order

<input type="checkbox"/> Document	Borrower	Category	Type	Description	By	Status	Status Date & Time	Upload Date	Review Date	Due Date	Expiration Date	Comment
<input type="checkbox"/> User Loan Assignment	Alice Firstimer				Path User	Uploaded	01/29/2020 3:48:43 PM	01/14/2020	01/29/2020	01/24/2020		
<input type="checkbox"/> Loan Details	Alice Firstimer				Path User	Uploaded	01/30/2020 4:59:10 PM	01/30/2020	01/30/2020			
<input type="checkbox"/> AD-3030 Rep's Regarding ...	Alice Firstimer	Disclosure	Other		Path User	Added from Library	01/30/2020 5:14:42 PM	01/30/2020				
<input type="checkbox"/> Acknowledgement of Recei...	Alice Firstimer	Form	Acknowledgement of Receipt...		Path User	Added from Library	01/30/2020 5:14:42 PM	01/30/2020				
<input type="checkbox"/> Bank Statement	Alice Firstimer	Assets	Bank Statement		System	Document Expired	01/30/2020 6:43:24 PM	01/30/2020				
<input type="checkbox"/> Bank Statement 3-11-2020	Alice Firstimer	Assets	Bank Statement		Path User	Uploaded	01/30/2020 6:02:15 PM	01/30/2020				
<input type="checkbox"/> Qualified Mortgage Finding		Processing	Qualified Mortgages		Bowen		01/30/2020 6:02:17 PM	01/30/2020				
<input type="checkbox"/> Qualified Mortgage Finding		Processing	Qualified Mortgages		Bowen		02/04/2020 4:32:33 PM	02/04/2020		02/06/2020		
<input type="checkbox"/> Qualified Mortgage Finding		Processing	Qualified Mortgages		Bowen		12/23/2019 12:00:08 PM					
<input type="checkbox"/> Qualified Mortgage Finding		Processing	Qualified Mortgages		Bowen		12/23/2019 3:58:48 PM					
<input type="checkbox"/> Qualified Mortgage Finding		Processing	Qualified Mortgages		Bowen		12/23/2019 5:36:46 PM					

+ File Drop Zone (Add from Computer)

Add from ComputerAdd from LibraryAdd Document RequestPick & Send Document RequestDeleteMergeReviewViewQuick ViewDownloadEmailSend For SignatureSave

2. Click the row of the document you want to access.

The document's details screen appears. The **Document Details** section contains the document name, category, and type. The condition fields are populated if any conditions were issued against this loan for the current document. The version table shows whether the document is active, the current document version, who reviewed the document and the date and time, the expiration date, and any comments. Each time a document with the same category and type of an existing document is added, you can increment the version by one or leave it as is.

ProductionLockComplianceConditionsDocumentsInterfacesMessages

ListQualified Mortgage FindingDeleted

Loan #:817550379Borrower:Alice FirstimerLock Status/Substatus:Not Locked/Lock Expiration:

Document Details

Document

Qualified Mortgage Finding

Borrower

Category

Processing

Type

Qualified Mortgages

Description

Status

Date and Time

12/23/2019 10:26:00 AM

Due Date

By

Bowen

Sent To

Conditions

Description

Checklist

Description

Active	Version	Reviewed	Review Date/Time	Expiration Date	Comments
<input checked="" type="checkbox"/>	1				

Document Image View

1 / 3100%

ExtractCopyDeleteMemo

Page Thumbnails

Move Pages:

All

LOANSCORECARD

SOLUTIONS FOR INTELLIGENT LENDING

QM Findings

Issued: 12/23/2019 10:25 AM

Result: General QM / Rebuttable

REQUESTED BY	BORROWER / COBORROWER	REQUESTED TERMS
Anitha Unit	Alice Firstimer	Base Loan Amt: \$142,500.00
	Application Date:	Note Loan Amt: \$142,500.00
	Lender Loan No: Unassigned	LTV/CLTV: 94.37% / 94.37%
	LSC Casefile ID: 1421677868	Note Rate: 5.250%
		Loan Type: Conventional
		Amort Type: Fixed
		Amort Term: 360 months
		Maturity Term:
		Purpose: Purchase
		Purpose of Refi:
		Lien Pos: First Mortgage

QM ASSESSMENT (Version 6.4)

This loan was evaluated against QM Type: General QM

ViewDownloadEmailSend for SignatureSaveReviewClose

3. Click **Email**.

The **Send Document** light box appears.

**Send Document**

Recipient's Email

Subject

Message

Documents

Description	Category	Type
Qualified Mortgage Finding	Processing	Qualified Mortgages

Document Password Protection

☒ Password

A maximum of 32 alphabetic, numeric, and special characters is allowed. Passwords are case-sensitives.  
Document are protected by a 245-bit AES key.

☐ No Password

Caution: Sending unprotected documents through email is a security risk.  
It is strongly recommended to protect your documents with a password.

☐ Include notes in download

**Add From Documents** **Send**

A. Enter the **Recipient's Email**.

B. Enter the **Subject** and **Message**.

C. To encrypt the document, select the **Password** radio button and enter the password in the corresponding field. Otherwise, select **No Password**.

**NOTE:** Use any combination of alpha, numeric, and special characters to create your password. The password is case-sensitive.

D. If you added note(s) to the document and want to include the note(s) in the email, select the **Include notes in download** check box.

E. To add more documents to the email, click **Add From Documents**.

The **Document Management List** light box appears.

Document Management List

×

🔍

Show Active Only ☐
Stacking Order 

▼

<input type="checkbox"/>	Type	Description	By	Date & Time	Version
📁 Uncategorized					
<input type="checkbox"/>	Uncategorized	User Loan Assignment		01/17/2020 3:36:32 PM	1
<input type="checkbox"/>	Uncategorized	Loan Details		01/17/2020 3:37:12 PM	1
📁 Disclosure					
<input type="checkbox"/>	Other	AD-3030 Rep's Regarding Felony ...		01/14/2020 6:22:47 PM	1
📁 Form					
<input type="checkbox"/>	Acknowledgement of Rec...	Acknowledgement of Receipt of Ho...		01/21/2020 1:53:16 PM	1
📁 Assets					
<input type="checkbox"/>	Bank Statement	BS		01/20/2020 4:56:35 PM	1
📁 Processing					
<input type="checkbox"/>	Qualified Mortgages	Qualified Mortgage Finding		01/21/2020 5:06:26 PM	1
<input type="checkbox"/>	Qualified Mortgages	Qualified Mortgage Finding	Path User	12/23/2019 10:26:48 AM	1

Select

i.Select the check box(es) of the document(s) to be added.

ii.Click **Select**.

The new document(s) are added to the **Documents** section, below the original document.

Documents

Description	Category	Type	
Qualified Mortgage Finding	Processing	Qualified Mortgages	🗑
BS	Assets	Bank Statement	🗑

Document Password Protection

🗑

G. Click **Send**.

A message appears confirming the document is sent. And the **Document History** section is updated regarding the when the document was emailed and by whom.