

HOW TO IMPORT DATA USING BYTE PRO

Open Byte Pro and when you are ready to submit your file click "Interfaces" then "Closing Docs" on the top menu bar

The screenshot displays the BytePro software interface for loan processing. The top menu bar includes 'File', 'Edit', 'Goto', 'Interfaces', 'Tools', 'Customize', 'Window', and 'Help'. The 'Interfaces' menu is circled in red. Below the menu bar is a navigation bar with icons for 'New', 'Save', 'Print', 'Preview', 'Home', 'Docs', 'Back', 'Forward', and 'Defaults'. The main interface is divided into several sections:

- Loan Files:** A sidebar on the left with a tree view showing 'Home', 'Alerts', 'Parties', 'Status', 'Processing Log', 'Conversation Log', 'Field Notes', and various GFE (Good Faith Estimate) pages and disclosures.
- STATUS:** A section with a 'Follow Up Flag' dropdown and 'Loan Status' text. It includes buttons for 'Jump to Status Screen', 'Jump to Processing Log', 'Jump to Conversation Log', and 'Jump to Notes'.
- CRITICAL DATES:** A section with date pickers for 'Application Date', 'Scheduled Approval Date', 'Scheduled Closing Date', and 'Signing Date'.
- BORROWERS:** A section with buttons for 'Add Borrower', 'Delete Borrower', and 'Move / Switch Borrowers'. It contains two application forms: 'Application 1 - Borrower' and 'Application 1 - Coborrower'. The borrower form includes fields for Name (Byte, Test), D.O.B., Age, Nickname, SSN, Non-Person Entity checkbox, Work, Home, Mobile, Fax, E-Mail, Street (123 Happy Trails), City-State-Zip (Arlington, TX, 76017), and EPX (TRU, XPN, Median).
- FILE ASSIGNMENTS:** A section with dropdowns for 'Loan Officer', 'Loan Processor', and 'Other User', all currently set to 'DEFAULT' or '[Not Assigned]'. A 'User Setup' button is also present.
- FILE PERMISSIONS:** A section with dropdowns for 'Loan Officer', 'Loan Processor', and 'Other User', all set to 'Full Access'.
- SUBJECT PROPERTY INFO:** A section with dropdowns for 'Street', 'City, State, Zip', and 'County', and input fields for 'No Units' and '1'.
- LOCK INFO:** A section with date pickers for 'Lock Start Date', 'Lock-in Days', and 'Lock Exp. Date'.
- TOP ALERTS:** A section on the right with a 'Close' button and a 'Closing Expected Today' alert. A 'Jump to Alerts Page' button is also present.
- OVERVIEW:** A section on the right showing loan details: 'Status', 'Sched Closing Date', 'Lock Expiration', 'Credit Score(s)', and a 'Details' link.
- LOAN:** A section on the right showing loan details: 'Occupancy', 'Loan Type', 'Loan Program', 'Interest Rate', 'APR Variance', 'Term', 'Price / Value', 'Loan Amount', 'P & I / PITI', 'D.T.I. Ratios', and 'LTV'.
- SUBJECT PROPERTY:** A section on the right showing property details: '123 Happy Trails', 'Arlington, TX 76017', 'Appraised Value', and 'Property Type'.

Select "PPDocs, Inc by PeirsonPatterson, LLP"

The screenshot shows a web application interface with a menu on the left, a main content area with a grid of document provider options, and a right-hand sidebar with alerts and loan details.

Menu (Left):

- Loan Files
- Zack Test
- Dashboard
- Reports
- Cardex
- Group [Organize Favorites](#)
- Favorites
- Find a Screen or Document
- Home
- Alerts
- Parties
- Status
- Processing Log
- Conversation Log
- Field Notes
- GFE 2010 Pages 1 and 3
- GFE 2010 Page 2
- GFE Part 1 - Loan Programs
- GFE Part 2 - Closing Costs
- GFE Part 3 - Prepaids
- GFE Part 4 - App Summary
- TX - Mortgage Broker Disc
- Truth in Lending / Reg Z
- Aggregate Escrow
- Amortization Schedule
- 1003 Page 1
- 1003 Page 2
- 1003 Page 3
- 1003 Page 4
- Disclosures

Main Content Area (Grid):

- DocMagic
- MRG
- Docs on Demand
- Online Documents, Inc.
- PPDocs, Inc. by PeirsonPatterson, LLP** (highlighted with a red circle)
- Document Express Closing Docs
- DocuTech ConformX
- ePASS
- IDS
- MISMO 2.3.1
- MISMO 2.6

TOP ALERTS (Right Sidebar):

- All Alerts Loan Processor Alerts
- [Lock Expired 126 Days Ago](#)
- [Closing Expected 90 Days Ago](#)
- [Jump to Alerts Page](#)

OVERVIEW (Right Sidebar):

Status

Sched Closing Date: 10/30/2009 [Details](#)

Lock Expiration: 09/14/2009

Credit Score(s): (-, -)

[Test One Borrower](#)

[Borrower Number Two](#)

LOAN (Right Sidebar):

Occupancy	Primary Residence
Loan Type	Conventional
Loan Program	
Interest Rate	6.000%
APR Variance	%
Term	360 months
Price / Value	\$175,000
Loan Amount	\$100,000
P & I / PITI	\$599.55 / \$899.55
DTI Ratios	0.00% / 0.00%
LTV	57.14% / 57.14%

Click "Submit"

The screenshot shows a web application window with a blue title bar containing the text "PeirsonPatterson, LLP" and a red close button. The main content area is light beige and contains the following elements:

- A header section with the text "PeirsonPatterson, LLP" and three links: "About PeirsonPatterson, LLP", "Sign Up", and "Technical Support".
- A contact number "800-800-9975" followed by "(Technical Support)".
- A section titled "Borrower(s)" containing a table with the following data:

Borrower	Byte Test
Co-Borrower	
Address	123 Happy Trails
City, State, Zip	Arlington, TX 76017
- A "Defaults" link on the left side.
- A "Submit" button, which is circled in red.
- A "Create" button to the right of the "Submit" button.
- A "Close" button at the bottom right of the window.

Login to PPDocs (if you're not already) and select a closing order form

Select Order Form

Displaying order forms for TX. Other states are available.

The sort order of and availability of the list of order forms can be [customized](#) to suit your needs. [Contact us](#) at 800.800.9975 to find out how.

APPLICATION / PRE CLOSING ORDER FORMS



Initial Disclosures - Federal

Initial Loan Disclosures required by TILA/Reg Z, RESPA, and other federal consumer regulations. Lender must provide their own Federal Privacy Notice, appropriate program disclosures, state specific disclosures (some Texas disclosures are available).



Aggregate Escrow Analysis

Calculations and forms to determine RESPA compliant starting balance for a loan closing.

SPECIALTY ORDER FORMS



Fax Cover Sheet

Fax cover sheet only.



RESPA GFE and HUD-1 Settlement Statement

This product can be used with or without P&P loan documents. Documents include the new 2010 GFE, HUD-1, TIL, Itemization of amount financed, and Amortization schedule.

CLOSING ORDER FORMS



Legal Documents Only

This package does not include a TIL. Conventional, FHA, or VA Mortgages Note, Security Instrument, Riders, Assignments, etc.



Residential Mortgage

Conventional, FHA, or VA Mortgage documents. Secondary market mortgage forms and support documents provided. Please see Residential Non Consumer Bank Loan order, if purpose is investment property not being sold in secondary market.



Residential Consumer Bank Loan

Flexible Bank loan documents for loans not usually sold in secondary market i.e. true daily earnings computation. Also used for home improvements, vacation property and 2nd homes.



Residential Non-Consumer Bank Loan (Investment Property) - RESPA DOES NOT APPLY (Closing statement given - NOT HUD-1)

Flexible Bank loan documents. A TIL is not required for investment - business, agricultural or commercial transaction unless loan is used for personal, family, household purposes...then the new TIL format and GFE are required (use Residential Consumer Bank Loan Order form). If order is for 2nd home use the Residential Mortgage or Residential Consumer Bank Loan order form.



Texas Home Equity (Closed End)

Was a GFE provided?

On certain closing document order forms we need to know if a GFE was provided

Home > Account > Respa

RESPA

IS THIS LOAN SUBJECT TO RESPA? DID YOU PROVIDE A GOOD FAITH ESTIMATE (GFE)?

For more information about Reg X and RESPA, along with tools to determine whether your loan applies or not, visit our [RESPA Resources](#) or check out the [FAQ about RESPA](#) on our website. If you have further questions, please [contact us](#).

Was a GFE provided?

[Continue... >](#)

Select Full Service or Express Service and click "order"

Home > Account > Products

Residential Mortgage

Conventional, FHA, or VA Mortgage documents. Secondary market mortgage forms and support documents provided. Please see Residential Non Consumer Bank Loan order, if purpose is investment property not being sold in secondary market.

Select Service:

Full Svc.-Conventional, FHA, or VA Package (1st or 2nd Lien) - RESPA	FREE	ORDER
Express-Conventional, FHA, or VA Package - RESPA	FREE	ORDER

WHAT IS EXPRESS SERVICE?

PPDocs, Inc. will NOT inspect, review, or perform quality assurance. We will present you a list of possible documents for your transaction. You may modify the document selection as needed. You may request multiple redraws as needed. There are no redraw fees.

WHAT IS FULL SERVICE?

PPDocs, Inc. will perform quality control of data based on the information entered on these order forms and provided via fax. We will select required document as well as review title commitment and survey.

Select a Profile and Template (if applicable) then click "Start New Order"

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:

Carrie Goff, CBA ▾

Template:

Templates are files that contain data that is imported into your new order. This is designed to help save time when ordering documents that contain similar information to a template file. You can turn any order into a template. Templates are order form specific. If you do not wish to use a template select "** Blank Template **".

ATTENTION: DO NOT USE TEMPLATES CREATED PRIOR TO JANUARY 1st, 2010 FOR LOANS REQUIRING THE NEW HUD-1. YOU MUST USE 2010 TEMPLATES TO ACCOMMODATE THE RECENT CHANGES TO RESPA.

Select template:

* Blank Template * ▾

Start a new order >

Click "Open Order Form" to finish processing. When you get to the end of the Order Form click "Submit"

Loan Information

Borrower:	Michael Young
Property:	12355 Northside Drive, TX
Lender:	ABC Lender
Loan Number:	111711
Last Modified:	7/23/2012 2:04:03 PM
Profile:	Carrie Goff, CBA
Template:	
Import:	PointWC 24

Selected Product

Residential Mortgage

Conventional, FHA, or VA Mortgage documents. Secondary market mortgage forms and support documents provided. Please see Residential Non Consumer Bank Loan order, if purpose is investment property not being sold in secondary market.

Service type: Express

Fee: \$0.00

[Open Order Form](#) >

[Import Data](#) >

[Export Data](#) >

[View Data](#) >

[Print Summaries](#) >

[Clone Order](#) >

[Create Template](#) >

[Send Copy](#) >

[Archive Order](#) >

[Fax Cover Sheet](#) >