

HOW TO IMPORT DATA USING DATATRAC

Open DataTrac and when you are ready to submit your file click the green and yellow Vendor Services arrows on the top menu bar

The screenshot displays the DataTrac software interface for a loan document. The title bar reads "DataTrac - Documents Department - TRAC, D. (148148888)". The menu bar includes "File", "Edit", "Tools", "Reports", "Admin", and "Help". A red circle highlights the "Vendor Services" icons (a green arrow and a yellow arrow) in the toolbar. The main interface is divided into several sections:

- General Information:** Borrower: TRAC, Loan #: 148148888, Status: REGISTERED. First Name: DATA, Link #: [blank], Submitted: [blank]. Originator Type: LENDER (P), SSN: 445-18-9237, Est. Closing: 12/20/2010. Originator: ABC LENDER, Office: CORPORATE, LO/Rep: GOFF, CARRIE, Broker L/O: [blank], Processor: GOFF, CARRIE, Other Contact: [blank].
- Property Information:** Address #: 1234, Street Name: RIVERSIDE DRIVE, City: ARLINGTON, State: TX, Zip: 76018-
- Loan Program Information:** Loan Program: CF30, Loan Term: 360, Prepay: NO. Program Details: FIXED, CONV, CONFORMING. Amort Term: 360, Buydown: NO. Investor: FNMA, Inv Loan #: [blank].
- Loan Information:** Loan Purpose: PURCHASE, Interest Rate: 5.250%, Lien: 1ST. Purpose Of Refi: CASH OUT - DEBT CONSOL, Base Factor: [blank], Cash Out: YES. Property Type: SFR, Base Loan Amount: 130,000, Impounds: NO. Occupancy: YES, Note Loan Amount: 130,000, LTV: 83.000%. Documentation: FULL, Purchase Amount: 157,000, CLTV: 83.000%. Appraised Value: 160,000, HCLTV: 83.000%.
- Document Draw Information:** Last Disclosure Date: [blank], Appraisal To Borrower: [blank], Clear to Close: [blank], Ready For Docs: [blank], Docs Ordered: [blank], Docs Drawn: [blank], Drawn By: GOFF, CARRIE, Doc System File #: 0. Redraw: [checkbox], Broker Docs: [checkbox].
- Document Information:** County: TARRANT, Note Date: 08/20/2011, First Payment: 10/01/2011, Last Payment: 09/01/2041, Docs Expire: 08/31/2011, Rescission Expires: [blank], Date Rescinded: [blank].
- Document Delivery Information:** Docs Sent: [blank], Sent To: [blank], How Docs Sent: [blank], Closing Appt: [blank], Docs Returned: [blank].

On the right side, there is a vertical navigation menu with buttons: MKT, UN D, DOC, FUN, ACT, SHIP, IN S, SRV. At the bottom right, there is a "NUM" field.

In the Service drop down box, select Documents – PPDocs, Inc. and click “New Order”

Vendor Services Client - Microsoft Internet Explorer provided by PeirsonPatterson, llp

Vendor Services Client Find Loan Admin Welcome CARRIE GOFF | Close | ?

Loan Service Orders

Loan Number: 148148888
Borrower: TRAC, DATA Lien Position: 1ST
Loan Amount: \$130,000.00 Program: CF30

Loan Details

Service: Documents - PPDocs, Inc. New Order

Order #	Vendor	Service	Service Status	Last Changed Date	Order History
1519433	PPDocs, Inc.	Order Documents	Received	8/15/2011 4:42:28 PM	History
150	PPDocs, Inc.	Order Documents	Error	8/15/2011 4:22:59 PM	History
150	PPDocs, Inc.	Order Documents	Error	8/15/2011 4:22:15 PM	History
150	PPDocs, Inc.	Order Documents	Error	8/15/2011 4:21:38 PM	History
150	PPDocs, Inc.	Order Documents	Error	8/15/2011 4:20:28 PM	History
150	PPDocs, Inc.	Order Documents	Error	8/15/2011 4:18:45 PM	History

http://vm17/VendorServicesClient/VendorServicesClient.aspx?linkkey=Loan...

Click "Submit"

The screenshot shows a web browser window titled "Vendor Services Client - Microsoft Internet Explorer provided by PeirsonPatterson, llp". The page header includes "Vendor Services Client" on the left, "Find Loan" and "Admin" buttons in the center, and "Welcome CARRIE GOFF | Close | ?" on the right. The main content area is titled "Order Service" and contains the following information:

Loan Number: 148148888	Lien Position: 1ST
Borrower: TRAC, DATA	Program: CF30
Loan Amount: \$130,000.00	

On the right side of the main content area, there is a logo for "ppdocs,inc" and a blue button labeled "Documents". Below this is a "Service Request Options" section with a radio button selected for "Order Documents". A red circle highlights the "Order Documents" radio button and the "Submit" button below it. A "Back" button is also visible.

At the bottom of the page, there is a copyright notice: "© 2010 DMD Inc. DataTrac and Vendor Services Client are registered trademarks of DMD Inc." and a logo for "DMD DATATRAC".

Select an 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	<input type="button" value="ORDER"/>
Express-Conventional, FHA, or VA Package - RESPA	FREE	<input type="button" value="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 a 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:

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:

[Start a new order >](#)

Click "Open Order Form" to finish inputting your data and submit your order

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