

HOW TO INSTALL THE CALYX POINT INTERFACE

Login to your PPDocs account and click on Support

peirsonpatterson, llp - provider of real estate documents - Microsoft Internet Explorer provided by PeirsonPatterson, llp

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites Home Mail Print Print Preview Stop

Address <https://www.ppdocs.com/default.aspx> Go Links

peirsonpatterson, llp
Attorneys at Law

Monday, October 08, 2007

Company Products Order Library Tools Support

e-mail
password
 Remember Me
Login

REGISTER | DEMO
I forgot my password.

Download Documents

Available Products

Standard Products

- Closing Documents with Survey Review & Title Quality Control

register | demo

Express Products

- Early Disclosures with FREE mail-out
- Legal Documents Only
- Aggregate Analysis

For immediate release.
ARLINGTON, Texas, August 16, 2007 - PeirsonPatterson, LLP (Arlington), a Texas law firm, announced today that it has been approved as the preferred document preparation provider for the Federal Agricultural Mortgage Corporation (NYSE: [AGM](#)), more commonly known as [Farmer Mac](#). The firm drafted a national set of real estate loan documents that would conform to the guidelines of the "Farmer Mac I" "Full-Time Farm" and "Part-Time Farm" mortgage loan products. Providing their sellers a resource for standardized closing documents has been a long time vision for Farmer Mac. The efficiencies that this product will create in many areas of the loan process will improve both production and service to not only their sellers and servicers, but the consumer as well.

A list of the Farmer Mac I loan product documents can be found at <http://www.ppdocs.com/famemac.aspx>.

Internet

Click on "Conduit/Interface Information"

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File Edit View Favorites Tools Help

Address <http://www.ppdocs.com/Support/Support.aspx> Go Links

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Monday, October 08, 2007 Company Products Order Library Tools **Support**

We strive to provide clear and accurate information to our users. Please let us know how we can provide you with better support. Email support@ppdocs.com for further assistance.

Support

If you require additional assistance please [contact us](#).

Topics

- [Conduit | Interface Information](#)
- [Password Retrieval](#)

Internet

Click on "Download Calyx Point Interface"

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File Edit View Favorites Tools Help

Address <http://www.ppdocs.com/Support/Conduits.aspx> Go Links

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Monday, October 08, 2007 Company Products Order Library Tools **Support**

Download Calyx Point® Interface Select "Run this program from its current location" and click "OK". When asked "Do you want to install and run 'P2PPDocs.exe from www.ppdocs.com'?", click "Yes".

Conduits for E-Pass (Genesis), FICS' Loan Producer, Byte, ARTA Lending, and MortgageWare 8.0 are also available.

For more information regarding data conduits, contact support@ppdocs.com.

Support

What are data conduits / interfaces?
Data conduits allow existing data in one system, application or program to be transferred over to another system, application or program. In this case, a data conduit would extract data from a Lender's loan origination system (LOS) and import it into the PPDocs.com online order form.

How does a data conduit / interface help?
A data conduit will increase your organizations productivity by virtually eliminating* the need for redundant data entry. It can also aid in reducing the number of errors that occur during the manual duplication of data. In some cases

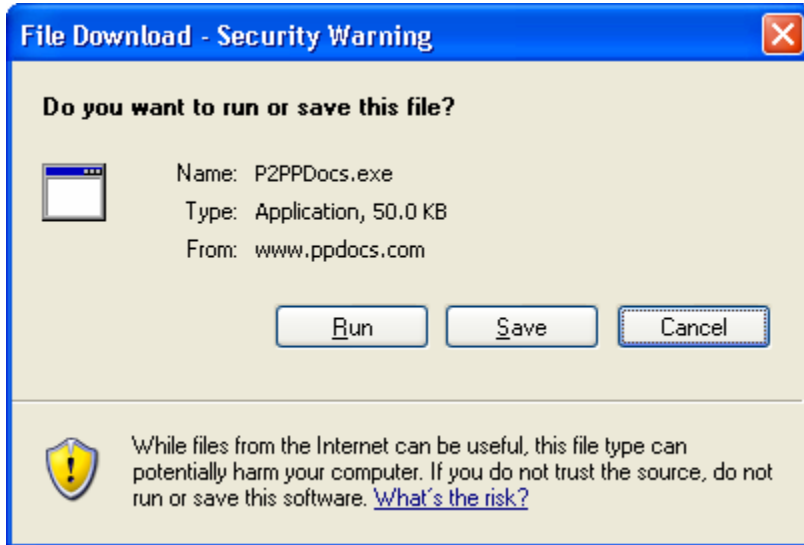
Who can make a data conduit / interface?
Any information systems engineer can easily "map" your organizations data to match the data format of our system.

What conduits / interfaces are currently available?
We currently provide data conduits / interfaces for:

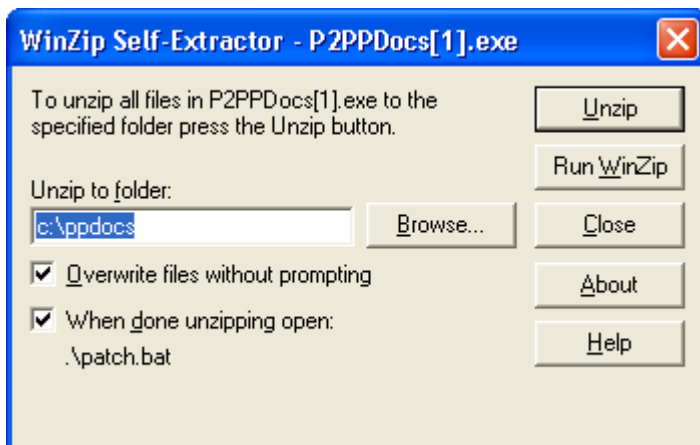
- MISMO Closing Data Version 2.3.1
- Bankers Systems (ARTA)
- Byte Pro
- Calyx Point

Done Internet

Click "Run"



Click "Unzip"

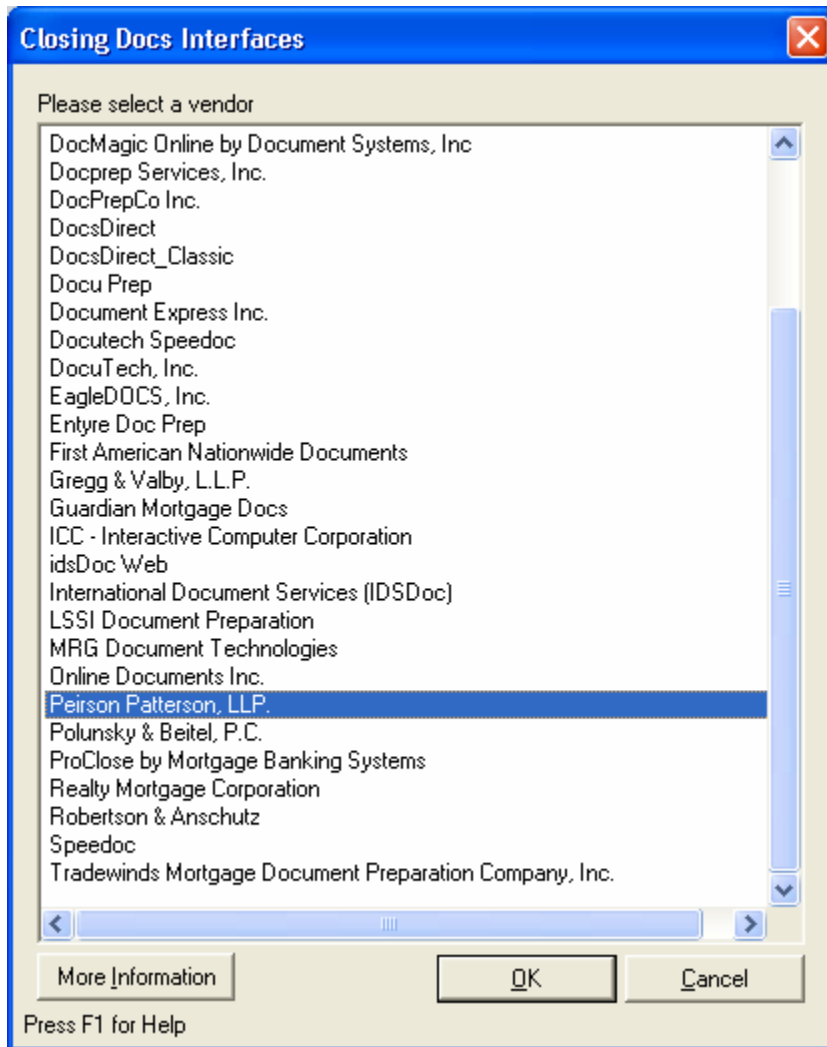


Click "OK"

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

The screenshot displays the Calyx Point software interface. The title bar reads "Point - [Doe - Test.brw]". The menu bar includes "File", "Edit", "Marketing", "Forms", "Verifs", "Track", "Banker", "Lenders", "Services", "Interfaces", "Bor/Co-Bor", "Utilities", "Window", and "Help". The "Interfaces" menu is circled in red. Below the menu bar is a toolbar with various icons. On the left is a "Navigation Panel" with sections for "Loans" (showing "Doe, John"), "Primary Data Folder" (listing various loan-related documents), and "Status: Opened (07/30/2007)". The main area is titled "Doe, John J. | Borrower Information" and contains several data entry fields and checkboxes. The "Borrower" section includes fields for First, Middle, Last, Suffix, SSN, and H Phone. The "Co-Borrower" section includes fields for First, Middle, Last, Suffix, SSN, and H Phone. Below these are sections for "Loan Rep", "Processor", "Loan Program", and "CC Scenario". The "Purpose of Loan" section includes checkboxes for Purchase, Cash-Out Refi, No Cash-Out Refi, Construction, and Construction-Permanent. The "Sales Price" section includes fields for Sales Price, w/ MIP, FF, Income, Down pmt, Note Rate, HE & Oblig, Appr Value, Term/Due, Other Pmts, Loan Amt, Mth Pmt, and Max Loan. The "Subject Property" section includes fields for Address, City, and State/Zip for both the subject property and the present address. At the bottom, there are tabs for "Contact Info", "Mtg Insurance", "Sub Financing", "Investment", and "Credit Scores", along with a "Keep open" checkbox and a status bar showing "Press F1 for Help" and "NUM Mon, 10/08/07".

Select PeirsonPatterson, LLP from the list and click OK



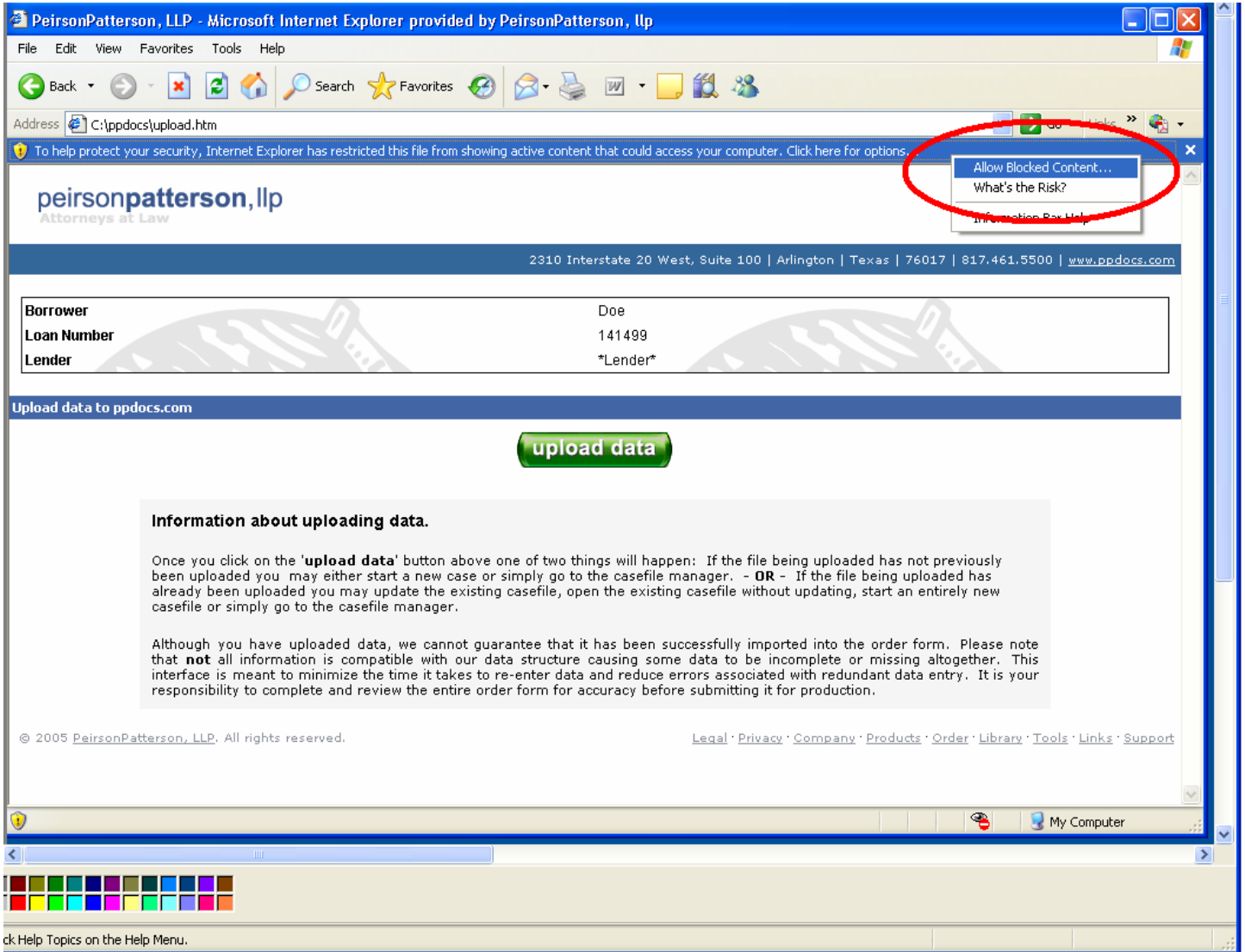
Click "Send Data"

The screenshot shows a software application window titled "Point - [Doe - Test.brw]". The interface is divided into several sections:

- Navigation Panel (Left):** Contains a "Loans" section for "Doe, John", a "Primary Data Folder" with a list of documents (e.g., Borrower Information, Loan Application-1 to -5, Prequalification, Amortization Schedule, etc.), a "Status" dropdown set to "Opened [07/30/2007]", and a "Lien" section with details like "Lien: First", "LTV/CLTV: 90.000 / 90.000%", "Est. Close: 10/11/2007", "Loan Amt: 135,000", "Rate/Qual: 5.500 / %", "Term/Due: 360 / 360", "Payment: 618.75", "Prop Addr: 1234 Oceanside Drive #9204", "Type/Purp: Conv / Purchase", and "Occupancy: Primary".
- Main Content Area (Right):** Titled "Doe, John J. | Closing Docs Interfaces - Peirson Patterson, LLP.", it features three sections:
 - Send:** A "Send Data" button is circled in red. Below it is the text: "Clicking this button will send data to Peirson Patterson, LLP."
 - Receive:** A "Receive Data" button. Below it is the text: "Clicking this button will receive data from Peirson Patterson, LLP. when available."
 - Setup:** An "Interface Status: Installed" label, an "Install" button, and a "More Information" button. Below the "Install" button is the text: "Clicking the install button will install the Peirson Patterson, LLP. interface if an automatic install is available. Otherwise, click More Information."

At the bottom of the window, there is a status bar with the text "Press F1 for Help" and a system tray showing "NUM Mon, 10/08/07".

Click on security bar at the top of the screen and click "Allow Blocked Content"



Click "Upload Data"

PeirsonPatterson, LLP - Microsoft Internet Explorer provided by PeirsonPatterson, llp

File Edit View Favorites Tools Help

Address C:\ppdocs\upload.htm

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Attorneys at Law

2310 Interstate 20 West, Suite 100 | Arlington | Texas | 76017 | 817.461.5500 | www.ppdocs.com

Borrower	Doe
Loan Number	141499
Lender	*Lender*

Upload data to ppdocs.com

[upload data](#)

[Click here to upload your data to PPDocs.com.](#)

Information about uploading data.

Once you click on the '**upload data**' button above one of two things will happen: If the file being uploaded has not previously been uploaded you may either start a new case or simply go to the casefile manager. - **OR** - If the file being uploaded has already been uploaded you may update the existing casefile, open the existing casefile without updating, start an entirely new casefile or simply go to the casefile manager.

Although you have uploaded data, we cannot guarantee that it has been successfully imported into the order form. Please note that **not** all information is compatible with our data structure causing some data to be incomplete or missing altogether. This interface is meant to minimize the time it takes to re-enter data and reduce errors associated with redundant data entry. It is your responsibility to complete and review the entire order form for accuracy before submitting it for production.

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Done My Computer

Click "Start a new loan"

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File Edit View Favorites Tools Help

Address <https://www.ppdocs.com/Interface/PointInterface.aspx> Go Links

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Monday, October 08, 2007 Company Products **Order** Library Tools Support

Calyx Point file format

Data uploaded appears to be a new loan. What would you like to do?

Option 1. [Start a new loan.](#)

Option 2. [Cancel. Take me to the Casefile Manager.](#)

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<https://www.ppdocs.com/OnlineSite/WebOrder/OrderForms.aspx?ConduitId=Point> Internet

Select an Order Form

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File Edit View Favorites Tools Help

Address <https://www.ppdocs.com/OnlineSite/WebOrder/OrderForms.aspx?ConduitId=Point>

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Casefile Manager E-Recording Setup Internet Logout

Links

- Back
- Fee Matrix
- Disclosure Matrix
- Calculators
- Step-by-Step
- FAQ & Glossary
- User Agreement

Select a product type from the available list to the right.

The order of and availability of the list of products can be customized to suit your needs. Call 'support' 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.

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 plus closing instructions and support documents.
- Residential Bank Loan**
Bank loan documents for loans not sold on the secondary market such as daily accrual loans. Very flexible.
- Texas Home Equity (Closed End)**
Closed-end Texas home equity loan documents.
- Texas Home Equity Line of Credit**
Texas Home equity line of credit loan documents.
- Builder Interim**
Builder interim loan documents for residential housing constructions.
- Borrower Interim**

Internet

Select Service Type and click "Order"

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File Edit View Favorites Tools Help

Address <https://www.ppdocs.com/OnlineSite/WebOrder/Products.aspx?LoanGuid=&UIP=CD&ConduitId=Point&ConduitInfo=>

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Casefile Manager E-Recording Setup Internet Logout

Links

- Back
- Fee Matrix
- Disclosure Matrix
- Calculators
- Step-by-Step
- FAQ & Glossary
- User Agreement

Residential Mortgage

Conventional, FHA, or VA Mortgage documents plus closing instructions and support documents.

Select service type.

Express-Conventional, FHA, or VA Package	FREE	Order
Full Svc.-First Lien-Conventional, FHA, or VA Package	FREE	Order
Full Svc.-Second Lien-Conventional, FHA, or VA Package	FREE	Order

Express service
PeirsonPatterson, LLP will NOT inspect / review / or perform quality assurance. We will present you a list of possible documents for your transaction. You may modify the selection as needed.

Full Service
PeirsonPatterson, LLP 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.

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Internet

Click "Start a new order"

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File Edit View Favorites Tools Help

Address <https://www.ppdocs.com/OnlineSite/WebOrder/CreateNew.aspx?UIP=CD&ProductId=FCD&ConduitId=Point&ConduitInfo=>

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Casefile Manager E-Recording Setup Internet Logout

Links

- Fee Matrix
- Disclosure Matrix
- Calculators
- Step-by-Step
- FAQ & Glossary
- User Agreement

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. If you do not wish to use a template select "* Blank Template *".

Select template: * Blank Template *

Start a new order

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Done Internet

Click "Open Order Form" and begin processing

The screenshot shows a Microsoft Internet Explorer browser window displaying the PeirsonPatterson, llp website. The browser's address bar shows the URL: <https://www.ppdocs.com/OnlineSite/WebOrder/OrderStatus.aspx?LoanGuid=C97EEFE7E8DA434986481E978326CFB4&ConduitInfo=&Auto=true>. The website header includes the company name "peirsonpatterson, llp" and "Attorneys at Law". A navigation bar contains links for "Casefile Manager", "E-Recording", "Setup", "Internet", and "Logout".

On the left side, there is a "Links" menu with the following items: Fee Matrix, Disclosure Matrix, Calculators, Step-by-Step, FAQ & Glossary, User Agreement, and Warranty.

The main content area is divided into sections:

- Loan Information:** A table with the following details:

Borrower:	John J. Doe
Property:	1234 Oceanside Drive #9204, TX
Lender:	ABC Lender
Loan Number:	141499
Last Modified:	10/8/2007 11:55:23 AM
Profile:	Carrie Goff, CBA
Template:	
Import:	Point
- Selected Product:** "Residential Mortgage (change product...)" with a description: "Conventional, FHA, or VA Mortgage documents plus closing instructions and support documents." The service type is "Full (\$0.00)". Below this are several action buttons: "Open Order Form" (circled in red), "View Data", "Import Data", "Export Data", "Clone Order", "Create Template", "Send Copy", "Archive Order", and "Check Sheet".
- System Log:** A table with columns "Description" and "Date":

Description	Date
Carrie Goff - modified loan	10/8/2007 11:55:23 AM
Carrie Goff - imported data from Calyx Point file name Doe - Test	10/8/2007 11:55:23 AM
Carrie Goff - modified loan	10/8/2007 11:55:17 AM
Carrie Goff - created a new loan	10/8/2007 11:55:16 AM

The browser's status bar at the bottom shows the JavaScript path: `javascript:OpenOrderForm('C97EEFE7E8DA434986481E978326CFB4')`.

HOW TO IMPORT DATA USING BYTE PRO

Login to your PPDocs account

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File Edit View Favorites Tools Help


Address <https://www.ppdocs.com/default.aspx> Go Links

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Wednesday, October 03, 2007 Company Products Order Library Tools Support

e-mail
password
 Remember Me
Login

REGISTER | DEMO
I forgot my password.

 **Download Documents**

Available Products

Standard Products

- Closing Documents with Survey Review & Title Quality Control

[register](#) | [demo](#)

For immediate release.
ARLINGTON, Texas, August 16, 2007 - PeirsonPatterson, LLP (Arlington), a Texas law firm, announced today that it has been approved as the preferred document preparation provider for the Federal Agricultural Mortgage Corporation (NYSE: [AGM](#)), more commonly known as [Farmer Mac](#). The firm drafted a national set of real estate loan documents that would conform to the guidelines of the "Farmer Mac I" "Full-Time Farm" and "Part-Time Farm" mortgage loan products. Providing their sellers a resource for standardized closing documents has been a long time vision for Farmer Mac. The efficiencies that this product will create in many areas of the loan process will improve both

Internet

Open Byte Pro and when you are ready to submit your file click on Interfaces, then Closing Docs

The screenshot displays the BytePro software interface. The 'Interfaces' menu item is circled in red. The main window is titled 'Home' and contains several sections:

- STATUS:** Follow Up Flag (Red Flag), Loan Status.
- CRITICAL DATES:** Application Date (10/02/2007), Scheduled Approval Date (10/02/2007), Scheduled Closing Date (10/05/2007), Signing Date (10/02/2007).
- BORROWERS:** Table with columns: First, Middle, Last, Suffix, Work, E-Mail. Entry: App 1, Tony, A., TestByte, Jr., [blank], [blank].
- FILE ASSIGNMENTS:** Loan Officer (DEFAULT), Loan Processor (DEFAULT), Other User ([Not Assigned]).
- FILE PERMISSIONS:** Loan Officer (Full Access), Loan Processor (Full Access), Other User (Full Access).
- SUBJECT PROPERTY INFO:** Street (123 Test Avenue), City, State, Zip (Arlington, TX, 76017), County (Tarrant), Property Type (Attached), Appraised Value (150,000.00).
- LOCK INFO:** Lock Start Date (10/02/2007), Lock-in Days (30), Lock Expiration Date (10/31/2007).

On the right side, there are panels for 'TOP ALERTS', 'OVERVIEW', 'LOAN', and 'SUBJECT PROPERTY'.

Status	
Sched Closing Date	10/05/2007
Lock Expiration	10/31/2007
Median Credit Score(s):	
Tony A. TestByte Jr	

Occupancy	Primary Residence
Loan Type	Conventional, Purchase
Loan Program	203(b)/251 3/1 ARM
Interest Rate	5.500%
Term	360 months
Price / Value	150,000.00
Base Loan	150,000.00
P & I / PITI	687.50 / 837.50
DTI Ratios:	0.00 / 0.00
LTV:	100.00 / 100.00

123 Test Avenue

Select PeirsonPatterson, LLP

The screenshot displays the BytePro - Test application window. The main area is titled 'Closing Docs' and contains several document icons: Document Express, DocuTech ConformX, IDS, MRE, PeirsonPatterson, LLP (circled in red), Online Document..., DocMagic, and ePASS. The left sidebar shows a 'List of Files' with 'File: Test' and 'Cardex' selected, and a 'Group' dropdown menu. The right sidebar contains a 'TOP ALERTS' section with a 'Jump to Alerts' button, an 'OVERVIEW' section with loan details, a 'LOAN' section with further details, and a 'SUBJECT PROPERTY' section.

OVERVIEW	
Status	
Sched Closing Date	10/05/2007
Lock Expiration	10/31/2007
Median Credit Score(s):	
	Tony A. TestByte Jr

LOAN	
Occupancy	Primary Residence
Loan Type	Conventional, Purcha
Loan Program	203(b)/251 3/1 ARM
Interest Rate	5.500%
Term	360 months
Price / Value	150,000.00
Base Loan	150,000.00
P & I / PITI	687.50 / 837.50
DTI Ratios:	0.00 / 0.00
LTV:	100.00 / 100.00

SUBJECT PROPERTY	
123 Test Avenue	

Click on Submit

The image shows a web application window with a blue title bar containing the text "PeirsonPatterson, LLP" and a close button. The main content area is light beige and contains two sections. The first section, titled "PeirsonPatterson, LLP", includes a link for "About PeirsonPatterson, LLP", a "Sign Up" link, a "Technical Support" link, and the phone number "800-800-9975 (Technical Support)". The second section, titled "Borrower(s)", contains a table with the following information:

Borrower	Tony TestByte
Co-Borrower	
Address	123 Test Avenue
City, State, Zip	Arlington, TX 76017

Below the table, there is a "Defaults" link and a "Submit" button. The "Submit" button is circled in red. At the bottom right of the window is a "Close" button.

Select Order Form

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File Edit View Favorites Tools Help

Address <https://www.ppdocs.com/onsite/WebOrder/OrderForms.aspx>

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Casefile Manager E-Recording Setup Internet Logout

Links

- Back
- Fee Matrix
- Disclosure Matrix
- Calculators
- Step-by-Step
- FAQ & Glossary
- User Agreement

Select a product type from the available list to the right.

The order of and availability of the list of products can be customized to suit your needs. Call 'support' 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.

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 plus closing instructions and support documents.
- Residential Bank Loan**
Bank loan documents for loans not sold on the secondary market such as daily accrual loans. Very flexible.
- Texas Home Equity (Closed End)**
Closed-end Texas home equity loan documents.
- Texas Home Equity Line of Credit**
Texas Home equity line of credit loan documents.
- Builder Interim**
Builder interim loan documents for residential housing constructions.
- Borrower Interim**
Borrower interim loan documents for residential housing constructions.
- Lot/Land Loan**
Bank loan documents for lot and land purchases.
- Home Improvement**
Bank loan documents for home improvement transactions.
- One-Time Closing**

Internet

Select service type and click on Order

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File Edit View Favorites Tools Help

Address <https://www.ppdocs.com/onlineSite/WebOrder/Products.aspx?LoanGuid=&WIP=CD&ConduitId=&ConduitInfo=> Go Links

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Casefile Manager E-Recording Setup Internet Logout

Links

- Back
- Fee Matrix
- Disclosure Matrix
- Calculators
- Step-by-Step
- FAQ & Glossary
- User Agreement

Residential Mortgage

Conventional, FHA, or VA Mortgage documents plus closing instructions and support documents.

Select service type.

Express-Conventional, FHA, or VA Package	FREE	Order
Full Svc.-First Lien-Conventional, FHA, or VA Package	FREE	Order
Full Svc.-Second Lien-Conventional, FHA, or VA Package	FREE	Order

Express service
PeirsonPatterson, LLP will NOT inspect / review / or perform quality assurance. We will present you a list of possible documents for your transaction. You may modify the selection as needed.

Full Service
PeirsonPatterson, LLP 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.

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Internet

Select Profile and Template, then click "Start a new order"

The screenshot shows a Microsoft Internet Explorer browser window with the address bar displaying <https://www.ppdocs.com/onsite/WebOrder/CreateNew.aspx?UIP=CD&ProductId=FCD&ConduitId=&ConduitInfo=>. The page header includes the logo for PeirsonPatterson, LLP and navigation links for Casefile Manager, E-Recording, Setup, Internet, and Logout. A left-hand navigation menu lists: Fee Matrix, Disclosure Matrix, Calculators, Step-by-Step, FAQ & Glossary, and User Agreement. The main content area is titled "Profile" and contains the following text: "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." Below this text is a dropdown menu labeled "Select profile:" with "DEFAULT" selected. The "Template" section follows, with text: "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. If you do not wish to use a template select '* Blank Template *'." Below this is a dropdown menu labeled "Select template:" with "* Blank Template *" selected. At the bottom of the main content area, a button labeled "Start a new order" is circled in red. The browser's status bar at the bottom shows "Done" and "Internet".

Open Order form and complete processing

The screenshot shows a Microsoft Internet Explorer browser window displaying the PeirsonPatterson, LLP website. The address bar shows the URL: `https://www.ppdocs.com/onlinesite/WebOrder/OrderStatus.aspx?LoanGUID=DD929BB959AB4DE6962B1462F2D9C66A`. The page header includes the company logo and navigation links: Casefile Manager, E-Recording, Setup, Internet, and Logout.

Links

- Fee Matrix
- Disclosure Matrix
- Calculators
- Step-by-Step
- FAQ & Glossary
- User Agreement
- Warranty

Loan Information

Borrower:	Borrower
Property:	, TX
Lender:	ABC Title
Loan Number:	
Last Modified:	10/3/2007 3:46:32 PM
Profile:	DEFAULT
Template:	
Import:	

Selected Product

Residential Mortgage (Change product...)
Conventional, FHA, or VA Mortgage documents plus closing instructions and support documents.
Service type: Full (\$0.00)

Buttons: Open Order Form, View Data, Import Data, Export Data, Clone Order, Create Template, Send Copy, Archive Order, Check Sheet

System Log

Description	Date
Carrie Goff - modified loan	10/3/2007 3:46:32 PM
Carrie Goff - created a new loan	10/3/2007 3:46:31 PM

The 'Open Order Form' button is circled in red. The status bar at the bottom shows the JavaScript command: `javascript:OpenOrderForm('DD929BB959AB4DE6962B1462F2D9C66A')`.

HOW TO IMPORT DATA USING ENCOMPASS

Login to your PPDocs account

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File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites Print Mail Print Preview Stop


Address <http://www.ppdocs.com/> Go Links

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Monday, October 08, 2007 Company Products Order Library Tools Support

e-mail
password
 Remember Me
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REGISTER | DEMO
I forgot my password.

 **Download Documents**

Available Products

Standard Products

- Closing Documents with Survey Review & Title Quality Control

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Express Products

- Early Disclosures with FREE mail-out
- Legal Documents Only
- Aggregate Analysis

For immediate release.
ARLINGTON, Texas, August 16, 2007 - PeirsonPatterson, LLP (Arlington), a Texas law firm, announced today that it has been approved as the preferred document preparation provider for the Federal Agricultural Mortgage Corporation (NYSE: [AGM](#)), more commonly known as [Farmer Mac](#). The firm drafted a national set of real estate loan documents that would conform to the guidelines of the "Farmer Mac I" "Full-Time Farm" and "Part-Time Farm" mortgage loan products. Providing their sellers a resource for standardized closing documents has been a long time vision for Farmer Mac. The efficiencies that this product will create in many areas of the loan process will improve both production and service to not only their sellers and servicers, but the consumer as well.

A list of the Farmer Mac I loan product documents can be found at <http://www.ppdocs.com/farmermac.aspx>.

Internet

Open Encompass and when you're ready to submit your file click on "Services" then "Doc Preparation"

The screenshot displays the Encompass software interface. The title bar reads "Encompass - (Offline)". The menu bar includes "Tabs", "Forms", "Verifs", "Tools", "Services", "Borrowers", and "Templates". The "Services" menu item is circled in red. Below the menu bar, there are tabs for "Loans", "ePASS", "eFolder", "Contacts", "News", "Dashboard", "Reports", and "Settings". On the right side of this bar are buttons for "Loan Mailbox", "Calculator", "Log Out", and "Help".

The main content area is divided into several sections:

- Log:** A table with columns for "Log" and "Add Entry". It shows "File started" on 07/30/07, "Emailed Carrie Test" on 09/25/07, "Docs ordered" on 09/27/07, and a "Send to processing" button.
- Loan Summary:** Displays "Loan Amount: 203,000.00", "LTV: 93.119/93.119", "DTI: /", "46 days remaining", and "Rate: 9.000". It also includes "Specials", "Print", "Save", and "Exit Loan" buttons.
- Borrower Summary:** A central section with a "Loan Status" dropdown set to "Active Loan" and a "Date" of "09/25/07".
- Borrower Information:** A table with columns for "Borrower" and "Co-Borrower". It includes fields for Name, S.S. #, DOB, H. Phone, W. Phone, E-mail, and marital status (Married).
- Present Address:** Two identical sections for the borrower and co-borrower, showing "Address: 123 Riverside Dr.", "City: Arlington", "State: TX", and "Zip: 76015".
- Previous Address:** Two empty sections for the borrower and co-borrower.

At the bottom left, there is a "Forms" section with a list of document types: "Borrower Summary", "1003 Page 1", "1003 Page 2", "1003 Page 3", "1003 Page 4", "FNMA Streamlined 1003", "Freddie Mac Additional REGZ - TIL", "Section 32 TIL", "GFE - Itemization", "MLDS - CA GFE", "Affiliated Business Disclosure", "Additional Disclosures Info", "Custom Fields", and "Transmittal Summary". A "Show All Forms" checkbox is at the bottom of this list.

The status bar at the bottom shows "Press F1 for Help", "36", "09/27 11:07", and "Monday, 10/8/2007".

Select PeirsonPatterson, LLP then click "Submit"

The screenshot shows a window titled "Doc Preparation" with a close button in the top right corner. Below the title bar are two tabs: "My ePASS Providers" (which is active) and "All ePASS Providers". The main area contains the instruction "Select a provider and click Submit." Below this is a list of providers. The first item, "PeirsonPatterson, LLP", is highlighted in blue. To the right of this item are two links: "Password Manager" and "More info". At the bottom of the window, there are three buttons: "Remove from My List" on the left, and "Submit" and "Cancel" on the right.

Click on "Submit Request"

Encompass - (Offline)

Loans ePASS eFolder Contacts News Dashboard Reports Settings Loan Mailbox Calculator Log Out Help

AutoFill Exit ePASS

peirsonpatterson, llp
Attorneys at Law

PeirsonPatterson, LLP a name you can count on.

PeirsonPatterson, LLP is a Texas law firm specializing in the preparation of residential real estate documents nationwide. With over twenty years of service, PeirsonPatterson, LLP has built a reputation of providing quick and affordable, quality loan document services via our dynamic web-based legal document ordering platform. Our team of real estate legal professionals are eager to provide any institution the loan document preparation service they seek to gain or maintain an edge over their competition. PeirsonPatterson, LLP is a name industry professionals recognize and trust.

Standard products include: Closing Documents with Survey Review & Title Quality Control.

Automated products include: Early Disclosures with FREE mail-out, Legal Documents Only, Aggregate Analysis, Closing Documents, Master Guidance Line Documents, and Interim Construction Documents under Master Guidance Line.

Existing Users of PPDocs' ePASS Interface: **—OR—** **New to PPDocs' ePASS Interface:**

- **Submit Request**
Click here to submit the Request.
- **Setup Login**
Click here to setup the Login information.

- **Sign up with PPDocs**
Click here to sign up with PPDocs.

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36 09/27 11:07 Monday, 10/8/2007

Select an Order Form

The screenshot shows the Encompass software interface. At the top, the window title is "Encompass - (Offline)". Below the title bar is a "Tabs" menu with options: Loans, ePASS, eFolder, Contacts, News, Dashboard, Reports, Settings. On the right side of the tabs menu are buttons for "Loan Mailbox", "Calculator", "Log Out", and "Help". Below the tabs menu is a navigation bar with icons for back, forward, home, and search, and buttons for "AutoFill" and "Exit ePASS".

The main content area features the "peirsonpatterson, llp" logo and the text "Attorneys at Law". Below the logo is a navigation bar with buttons for "Casefile Manager", "E-Recording", "Setup", "Internet", and "Logout".

The main content area is divided into two sections:

- 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.
- 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 plus closing instructions and support documents.
 - Residential Bank Loan**

Bank loan documents for loans not sold on the secondary market such as daily accrual loans. Very flexible.
 - Texas Home Equity (Closed End)**

Closed-end Texas home equity loan documents.
 - Texas Home Equity Line of Credit**

Texas Home equity line of credit loan documents.
 - Builder Interim**

Builder interim loan documents for residential housing constructions.

On the left side of the main content area, there is a "Links" sidebar with the following items:

- Back
- Fee Matrix
- Disclosure Matrix
- Calculators
- Step-by-Step
- FAQ & Glossary
- User Agreement

Below the "Links" sidebar, there is a note: "Select a product type from the available list to the right." and another note: "The order of and availability of the list of products can be customized to suit your needs. Call 'support' at 800.800.9975 to find out how."

At the bottom of the window, the status bar shows "Done", "36", "09/27 11:07*", and "Monday, 10/8/2007".

Select Service Type and click "Order"

peirsonpatterson, llp - provider of real estate documents - Microsoft Internet Explorer provided by PeirsonPatterson, llp

File Edit View Favorites Tools Help

Address <https://www.ppdocs.com/OnlineSite/WebOrder/Products.aspx?LoanGuid=&UIP=CD&ConduitId=Point&ConduitInfo=>

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Attorneys at Law

Casefile Manager E-Recording Setup Internet Logout

Links

- Back
- Fee Matrix
- Disclosure Matrix
- Calculators
- Step-by-Step
- FAQ & Glossary
- User Agreement

Residential Mortgage

Conventional, FHA, or VA Mortgage documents plus closing instructions and support documents.

Select service type.

Express-Conventional, FHA, or VA Package	FREE	Order
Full Svc.-First Lien-Conventional, FHA, or VA Package	FREE	Order
Full Svc.-Second Lien-Conventional, FHA, or VA Package	FREE	Order

Express service
PeirsonPatterson, LLP will NOT inspect / review / or perform quality assurance. We will present you a list of possible documents for your transaction. You may modify the selection as needed.

Full Service
PeirsonPatterson, LLP 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.

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Internet

Click "Start a new order"

The screenshot shows a Microsoft Internet Explorer browser window displaying the PeirsonPatterson, LLP website. The browser's address bar shows the URL: <https://www.ppdocs.com/OnlineSite/WebOrder/CreateNew.aspx?UIP=CD&ProductId=FCD&ConduitId=Point&ConduitInfo=>. The website header includes the logo for PeirsonPatterson, LLP, "Attorneys at Law", and navigation links for "Casefile Manager", "E-Recording", "Setup", "Internet", and "Logout".

On the left side, there is a "Links" menu with the following items: "Fee Matrix", "Disclosure Matrix", "Calculators", "Step-by-Step", "FAQ & Glossary", and "User Agreement".

The main content area is divided into two sections:

- 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. Below this text is a "Select profile:" dropdown menu with "Carrie Goff, CBA" selected.
- 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. If you do not wish to use a template select "* Blank Template *". Below this text is a "Select template:" dropdown menu with "* Blank Template *" selected.

At the bottom of the main content area, there is a button labeled "Start a new order", which is circled in red. The footer of the page contains the copyright notice "© 2007 PeirsonPatterson, LLP. All rights reserved." and a list of links: "Company", "Products", "Order", "Library", "Tools", "Links", and "Support". The browser's status bar at the bottom shows "Done" and "Internet".

Click "Open Order Form" and begin processing

The screenshot shows the Encompass software interface. At the top, there is a navigation bar with tabs for Loans, ePASS, eFolder, Contacts, News, Dashboard, Reports, and Settings. On the right side of this bar are buttons for Loan Mailbox, Calculator, Log Out, and Help. Below the navigation bar is a toolbar with navigation icons and buttons for AutoFill and Exit ePASS. The main header area displays the logo for PeirsonPatterson, LLP, Attorneys at Law, and a secondary navigation bar with buttons for Casefile Manager, E-Recording, Setup, Internet, and Logout.

On the left side, there is a 'Links' sidebar with the following items: Fee Matrix, Disclosure Matrix, Calculators, Step-by-Step, FAQ & Glossary, User Agreement, and Warranty.

The main content area is divided into several sections:

- Loan Information:** A table with the following data:

Borrower:	Encompass Test
Property:	123 Riverside Dr., TX
Lender:	ABC Lender
Loan Number:	949494
Last Modified:	10/8/2007 2:37:44 PM
Profile:	Carrie Goff, CBA
Template:	
Import:	ePass
- Selected Product:** Residential Mortgage (change product...). Below this, it says 'Service type: Full (\$0.00)'. A row of buttons is displayed: Open Order Form (circled in red), View Data, Import Data, Export Data, Clone Order, Create Template, Send Copy, Archive Order, and Check Sheet. A 'Launch Editor' button is located below the 'Open Order Form' button.
- System Log:** A table with the following data:

Description	Date
Carrie Goff - modified loan	10/8/2007 2:37:44 PM
Carrie Goff - imported data from ePass	10/8/2007 2:37:44 PM
Carrie Goff - modified loan	10/8/2007 2:37:32 PM
Carrie Goff - created a new loan	10/8/2007 2:37:31 PM

At the bottom of the window, there is a footer with the text: © 2007 PeirsonPatterson, LLP. All rights reserved. On the right side of the footer are links for Company, Products, Order, Library, Tools, Links, and Support. The status bar at the very bottom shows page number 36, time 09/27 11:07*, and date Monday, 10/8/2007.