

# Selecting Default Documents by Lender

This is a feature of GenX which allows you to select document packages by Lender. Once you select your defaults for a certain lender (done in Lender Maintenance), you'll have the option to print the same documents every time you use that lender in a closing.

## LENDER MAINTENANCE

Lender Maintenance can be accessed through the Utilities drop-down menu.

**Page 1/Page 2** – The first two tabs in Lender Maintenance have not been changed. Here you enter general information about the lender. You can select a Lender by using the drop down box in the upper left-hand corner.

**The Default Documents to Print Tab** – This is where you can select default documents to print for each lender. This only applies to state and universal documents, not title forms.

### To set up your default documents for each lender:

- 1) Go to the third tab – Default Documents To Print
- 2) Select the lender that you want to work with from the drop down box.
- 3) By choosing Refinance or Purchase you may now set up a Refinance or a Purchase package for the lender you have chosen.
- 4) You must now choose your documents. When you chose state documents, your enabled state(s) document menu will appear. Select documents for each state in which you process loans for this lender.
- 5) When you choose universal documents, a list of document types will appear. When you make a selection from that list, a menu of documents will appear. It is here that you select the documents that you want for your default package.
- 6) Repeat this process, so that you have chosen both a Refinance package and a Purchase package.

## PRINTING MENU

To access the Printing Menu you must be in a closing file. On the Information Menu screen, click the Select Documents To Print button in the lower right-hand corner of the screen.

### USE DEFAULT SELECTIONS FROM LENDER MAINTENANCE

- At the top of the Printing Menu screen, there is a button with the above label. Click this button to use your default selections for the active lender in the current file.
- If you pre-selected documents in Lender Maintenance that require additional information before they are printed, you will be prompted to enter this information at this point.
- All documents you selected in Lender Maintenance will now be selected here. If you wish, you can enter state documents or universal documents to add additional documents to your default selections or to uncheck documents so that they don't print.
- If you deselect the button, your default selections will no longer be active and you will have to go in and select all the documents manually.

The screenshot shows a software interface titled "ProDocs - GenX2 - Printing Menu for 1053-97". At the top, there is a radio button labeled "Use Default Selections From Lender Maintenance" with the subtext "Applies Only To State And Universal Documents". Below this are three selection buttons: "Select State Documents" (with a state outline icon), "Select Universal Documents" (with an American flag icon), and "Select Title Forms" (with a document icon). At the bottom, there are three navigation buttons: "Return to Master menu" (with a left arrow icon), "Print the Selected Forms" (in blue text), and "Return to Information Menu" (with a right arrow icon).

Once you complete this process, you can print in the normal manner. As always, you can also use pdfFactory to print preview, e-mail, or save a pdf file to your hard drive.