Document Generation

Suggest Edits

Settings--> Platform Settings--> Doc Settings

Document Library

The document library contains industry related docs & forms that are organized under a set of folders. The Blue PDF icon, means it will be e-signable by the borrower/co-borrower. You can set which documents from our built in library are available at the parent company level. If you do not want a document enabled/available for your company you can uncheck it here. This will instantly turn it off for all branches. If you need to turn a document off for only an individual branch, then do that on the branch level settings.

> **Custom Docs**
>
> If we built any custom docs for you, they will be here under the custom docs folder.
>
> NOTE: We want to expand this library, so please provide us with example forms that should be included at newdocs@lendingwise.com But, make sure the fields that need to be auto-populated are highlighted and indicate the exact LendingWise Field ID. by right clicking the field→ Inspect element→ Copy/paste the ID value.

Example folders & templates inside are:

4506→ 4506-C, 4506-T, with versions for borrower only, bor + co-bor jointly, co-bor only

Borrower→ 1003, Credit Authorization, Term Sheet, Pre-approval, Schedule of liabilities, Schedule of real estate owned, Schedule of Real Estate Owned & Sold, Required docs status, w-9 Borrower Version , ETC...

Disclosures→ Payment authorization, balloon disclosure business purpose occupancy statement, flood ins agreement, MLDS form, etc...

Loan Docs→ Balloon note, E-consent, First payment letter, Full loan application, Business loan Request form, quick app, Closing instructions, Mortgage note, Promissory note,

SBA docs→ 413 form- Personal Financial Statement, SBA promissory note

Company Docs & Files- You can also upload static documents here on the company level so they are available for the whole company. Then you can enable which branches to show them on via the branch settings "docs settings" tab.

Required Docs for Broker Registration- Each branch has a broker registration form, that allows brokers to register via a webform embedded on your website. That form can ask for certain docs to be uploaded like drivers license, W-9, Signed Broker Application, NDA, etc...

Updated about 2 months ago

← Required Docs
Doc Wizard- Google Docs & Sheets Integration →