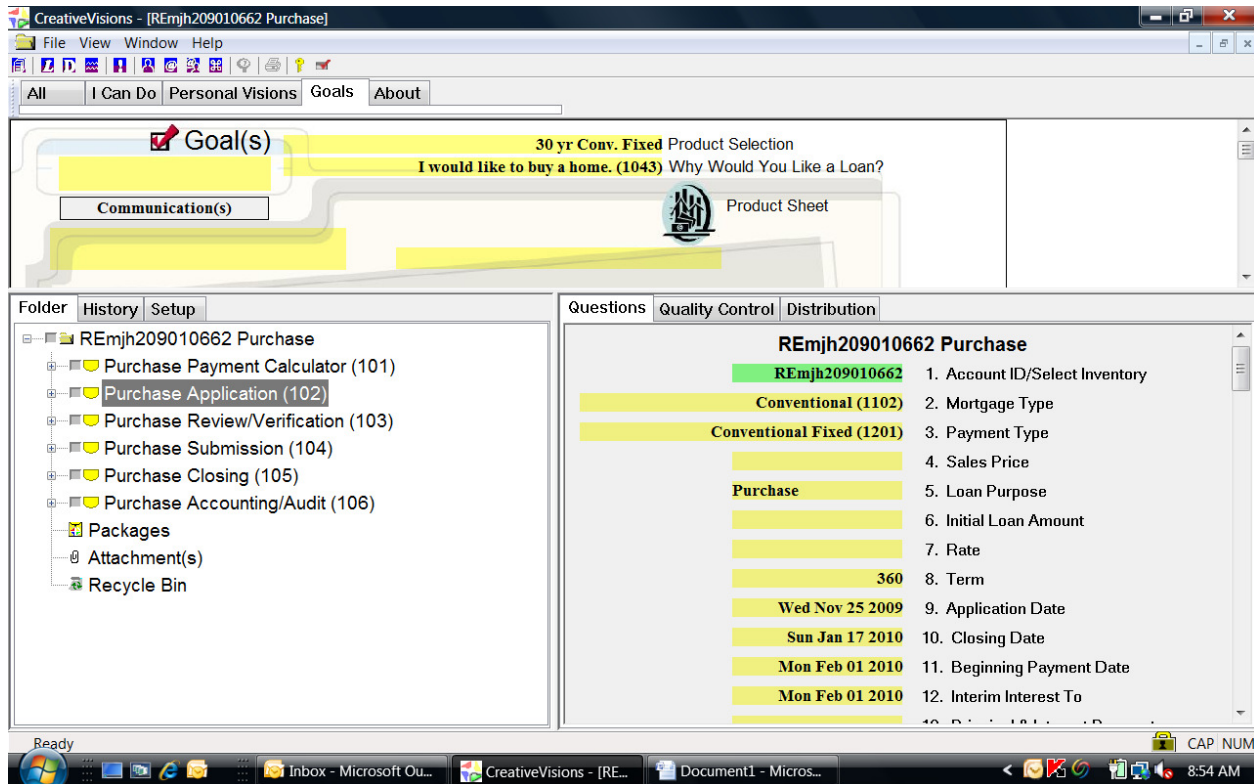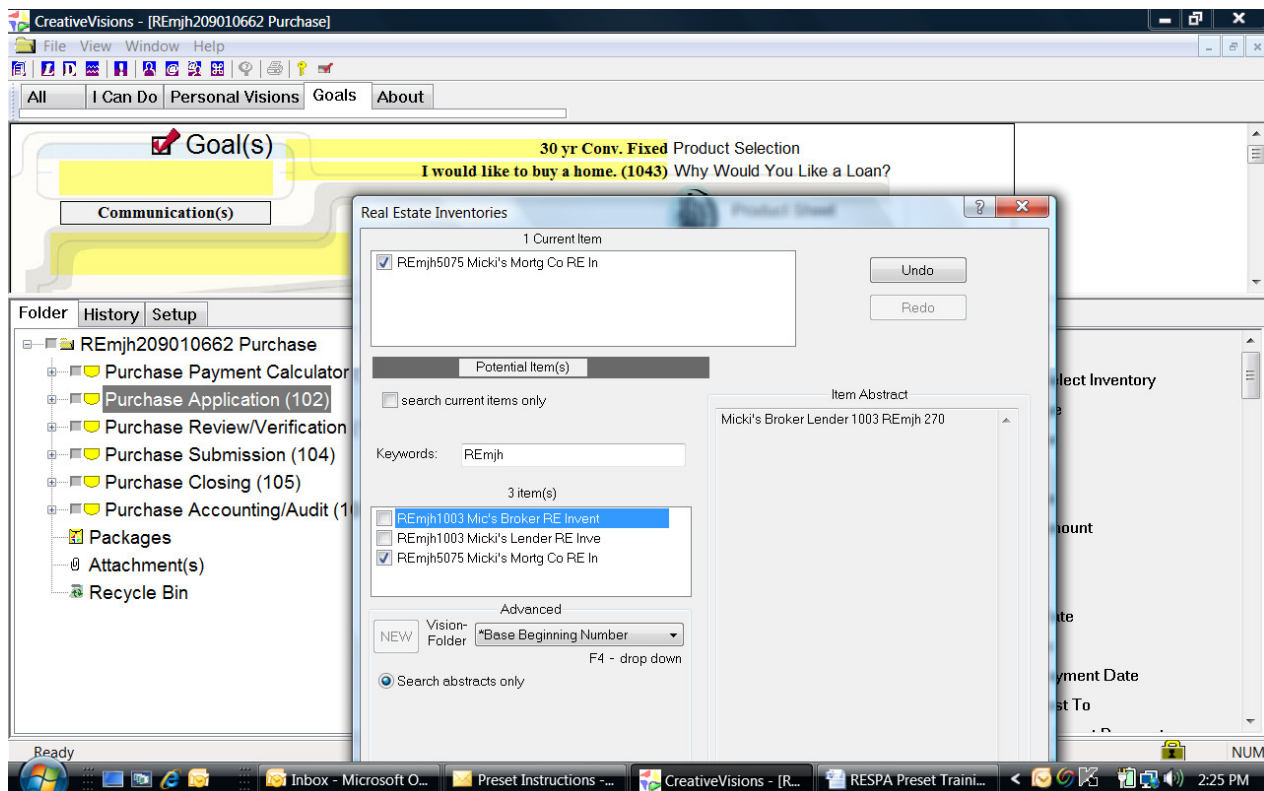## INSTRUCTIONS FOR PRESETTING FEES -

Create a Test Loan for each type of loan offered, such as Conventional, FHA, VA and USDA.


Once a loan is created, select a Training Inventory so an Account ID is assigned to the loan.

After you exit the Test Loan, it can be accessed again by entering on the 'Loans' icon and searching by the Account Number.   Or, the file can also be found from 'My Files'.
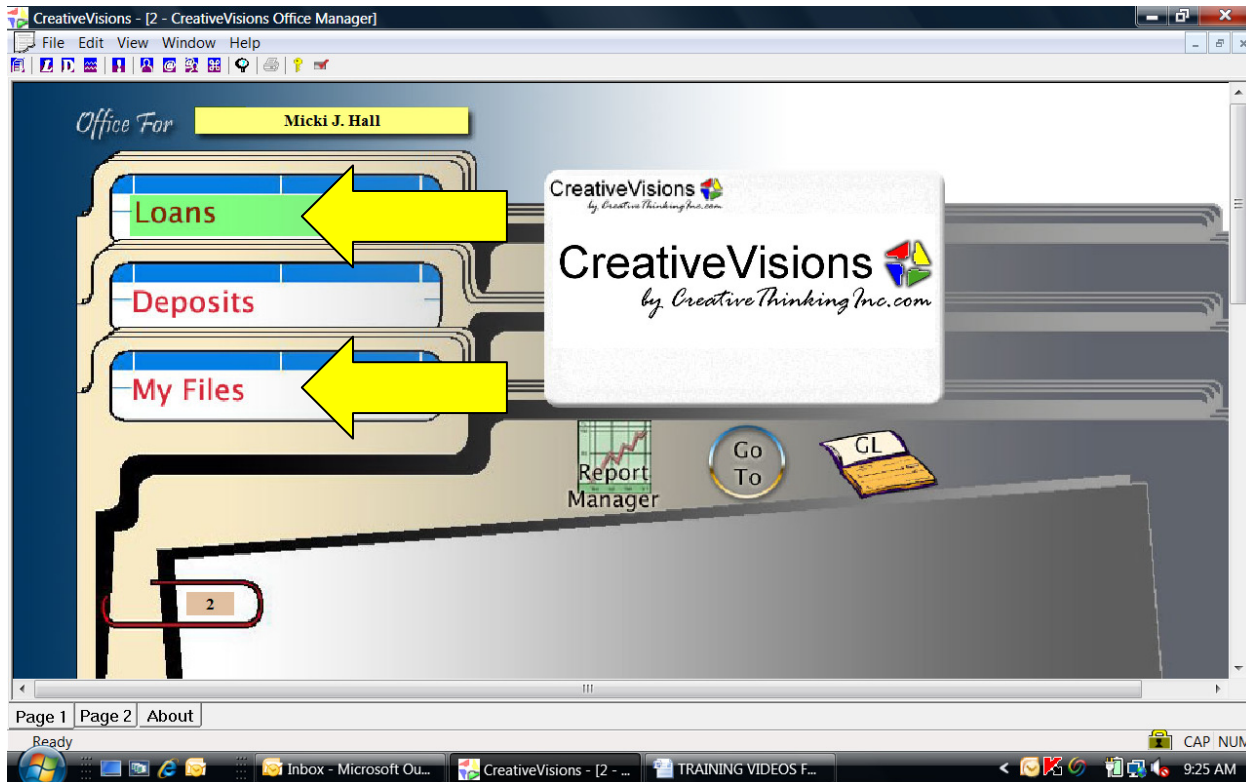

All loans created by you will be listed at the bottom of the loans located in 'My Files'. Comments can be entered for each Test Loan to describe the file for future reference.
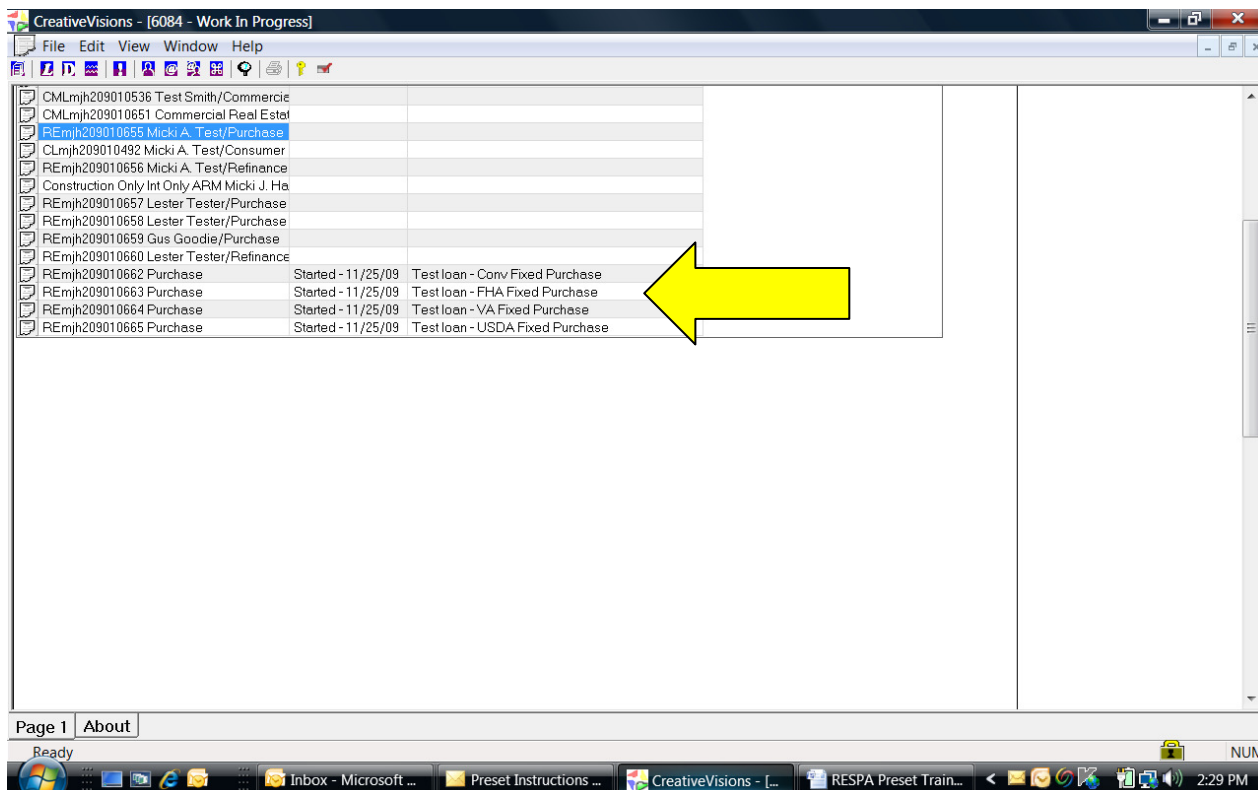

Load the first test loan from 'My Files' by double clicking on the Loan Number or Borrower Name.

Highlight the Application Stage to access the Application Stage questions and use the scroll bar to go to the bottom of the list of questions to locate the 'View' button for access to the new Good Faith Worksheet. Enter on the 'View' button to load the GFE/HUD Data Entry Worksheet.
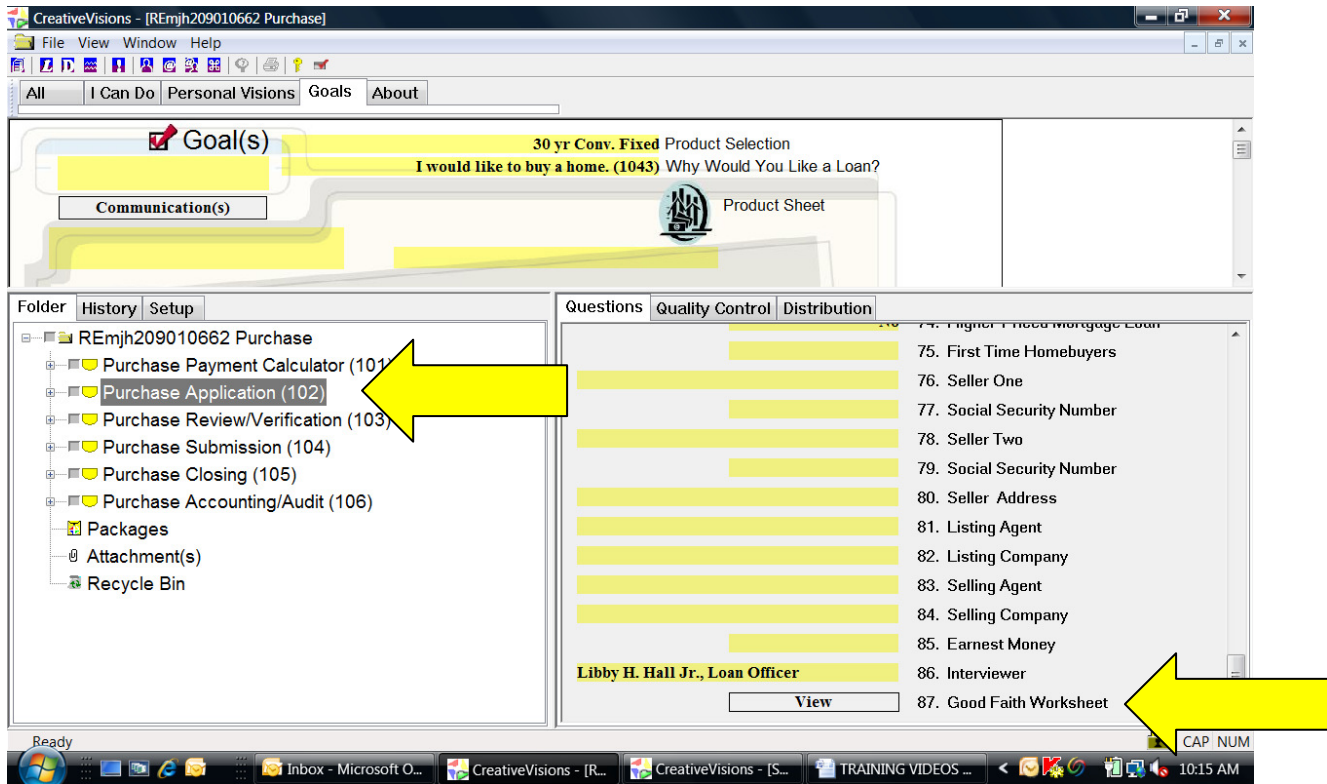
The GFE/HUD Data Entry Worksheet will reflect the fees which are currently preset for this product.
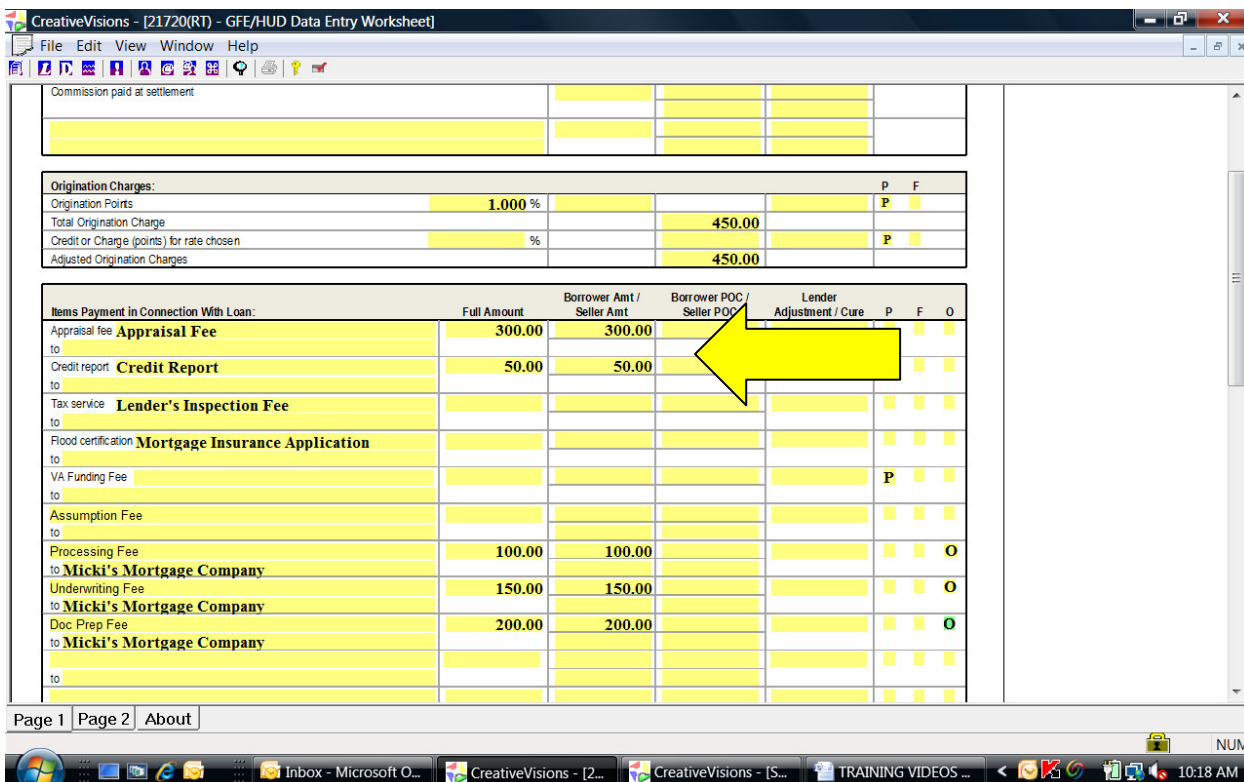
Edit the fees and their descriptions as needed so the answers in this Test loan will be available for presetting.

From the Goals page in the Test Loan, click on the Set-Up tab, followed by the Presets tab to load the list of preset visions. This view will display all of the preset visions for this loan type. The example below shows the Conventional Fees & Charges presets vision. This preset vision provides preset fees for all Conventional loans.

Load the preset vision full screen by double clicking on the icon to the left of the vision number. The example below shows CTI1037 – Conventional Fees & Charges presets.
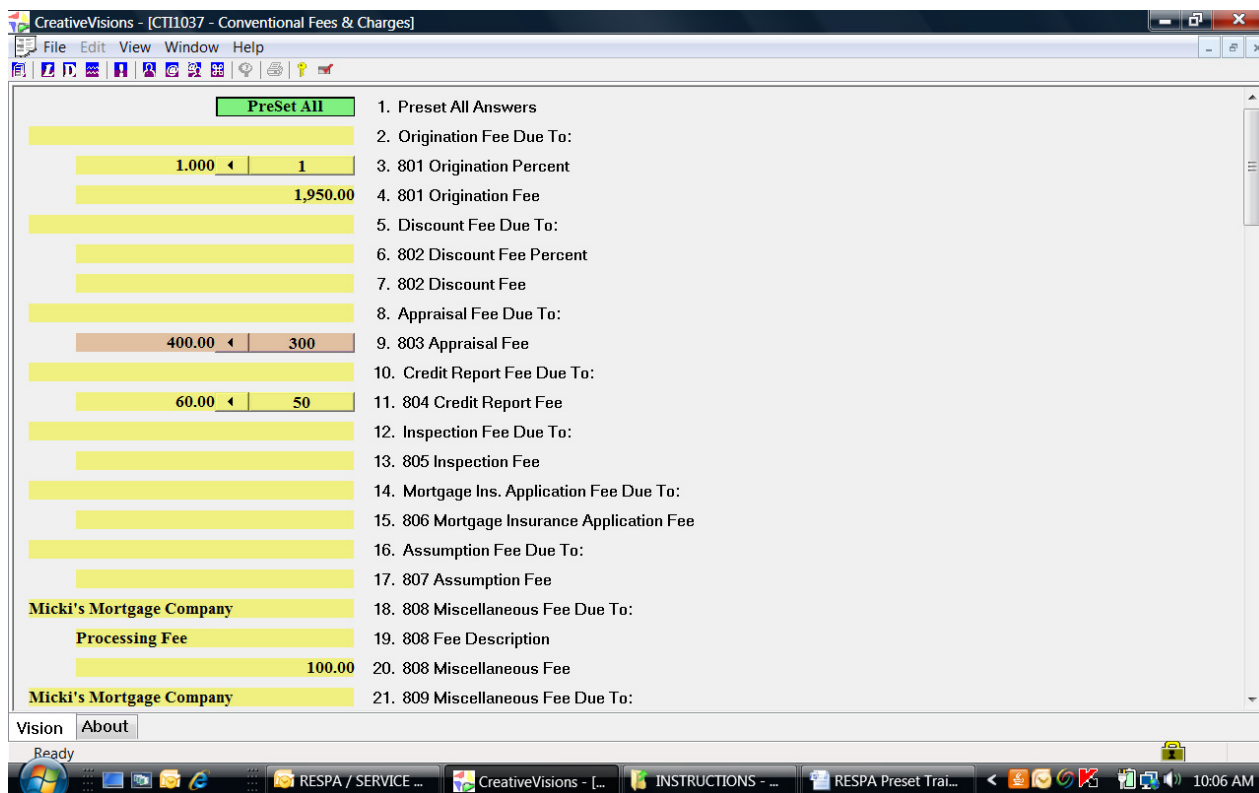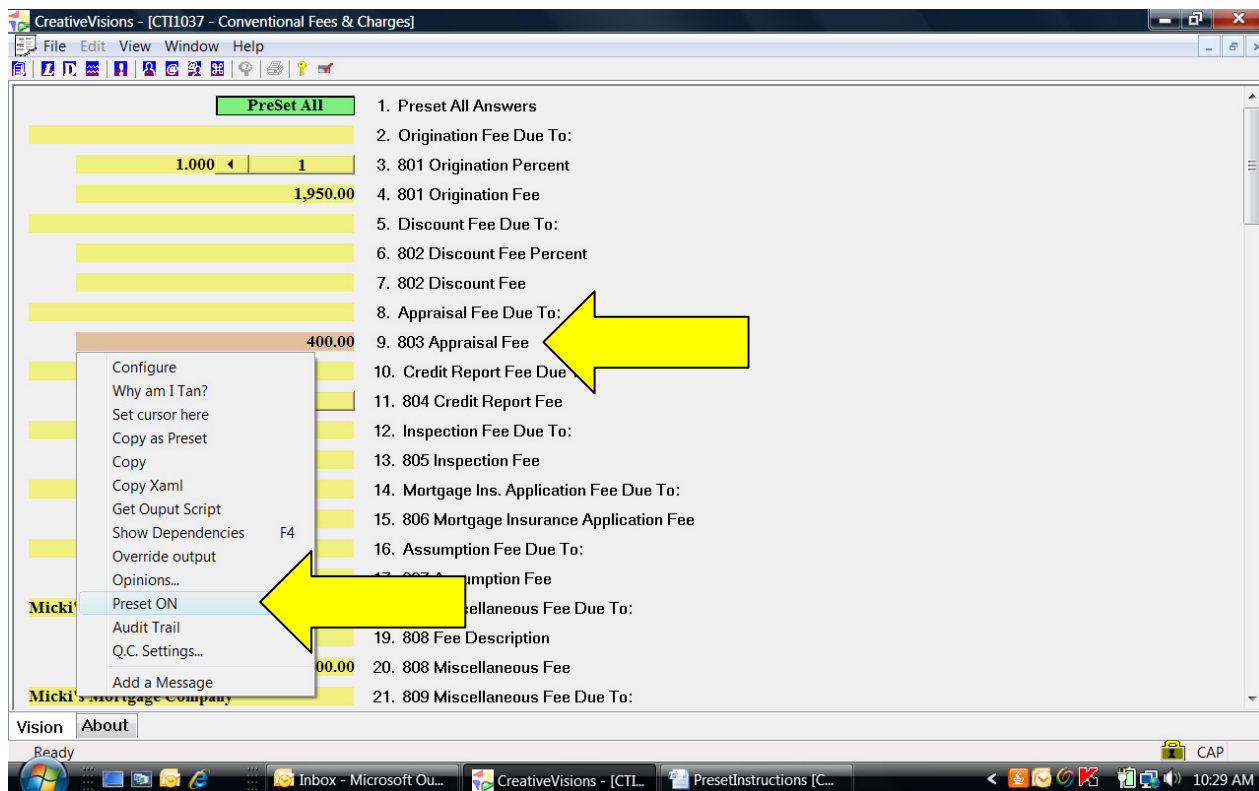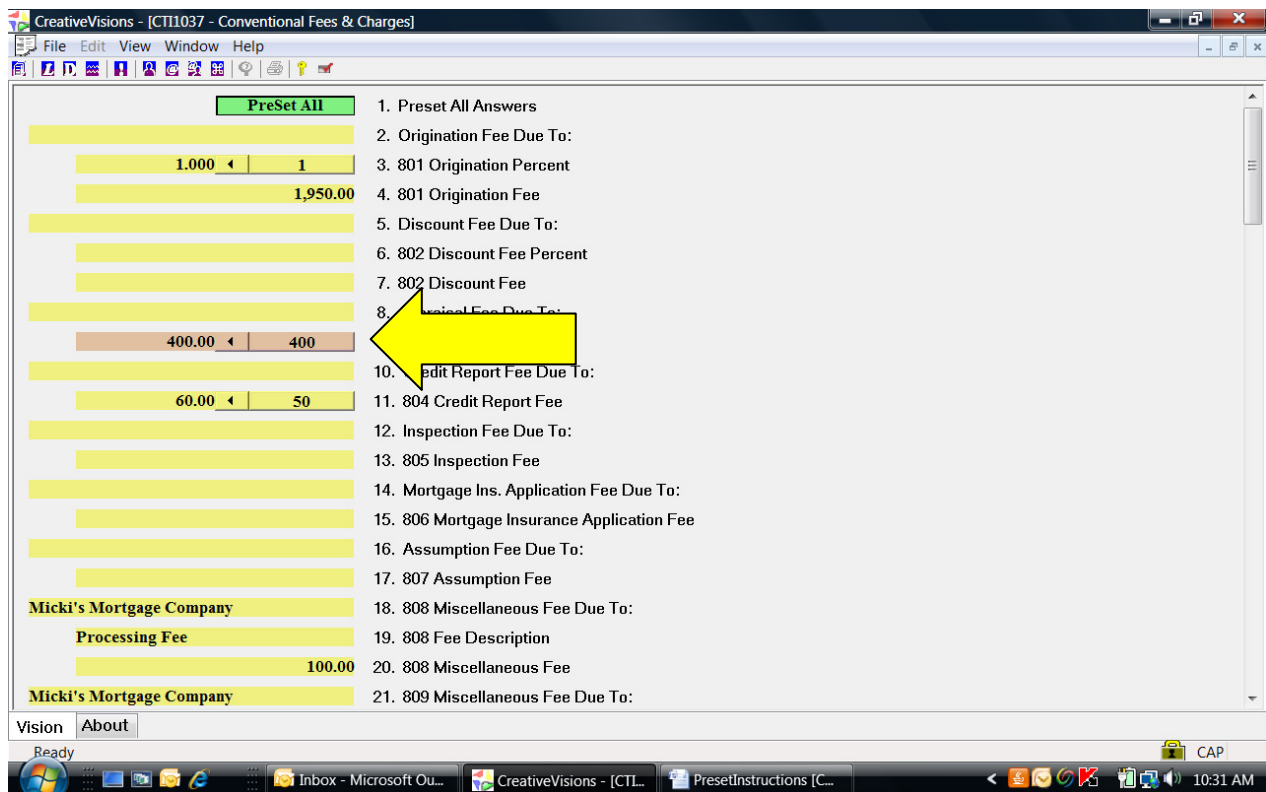

TO TURN A PRESET ON, position your cursor on the control which displays the answer you would like to preset.

Right click on the control to display a list of choices, then click on 'Preset ON' to set the preset.

The preset displays as a preset bar with the answer, and an arrow points left to the answer in your Test Loan.


TO TURN A PRESET OFF, right click on a control to display a list of choices, then click on 'Preset OFF' to turn the preset off.
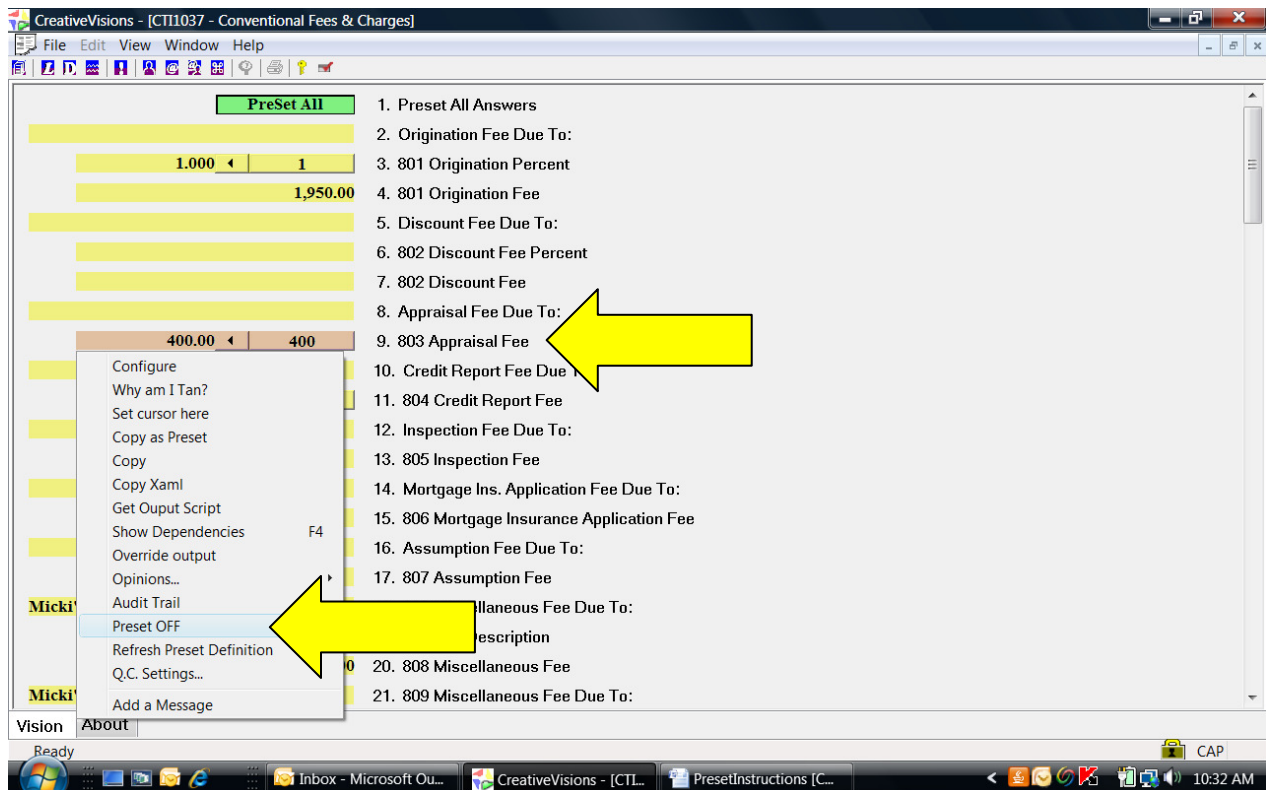
TO CHANGE A PRESET ANSWER TO A DIFFERENT ANSWER, click on the field to the left of the arrow to change

the answer of the question in your loan (unless you have already done this on GFE/HUD Data Entry Worksheet).
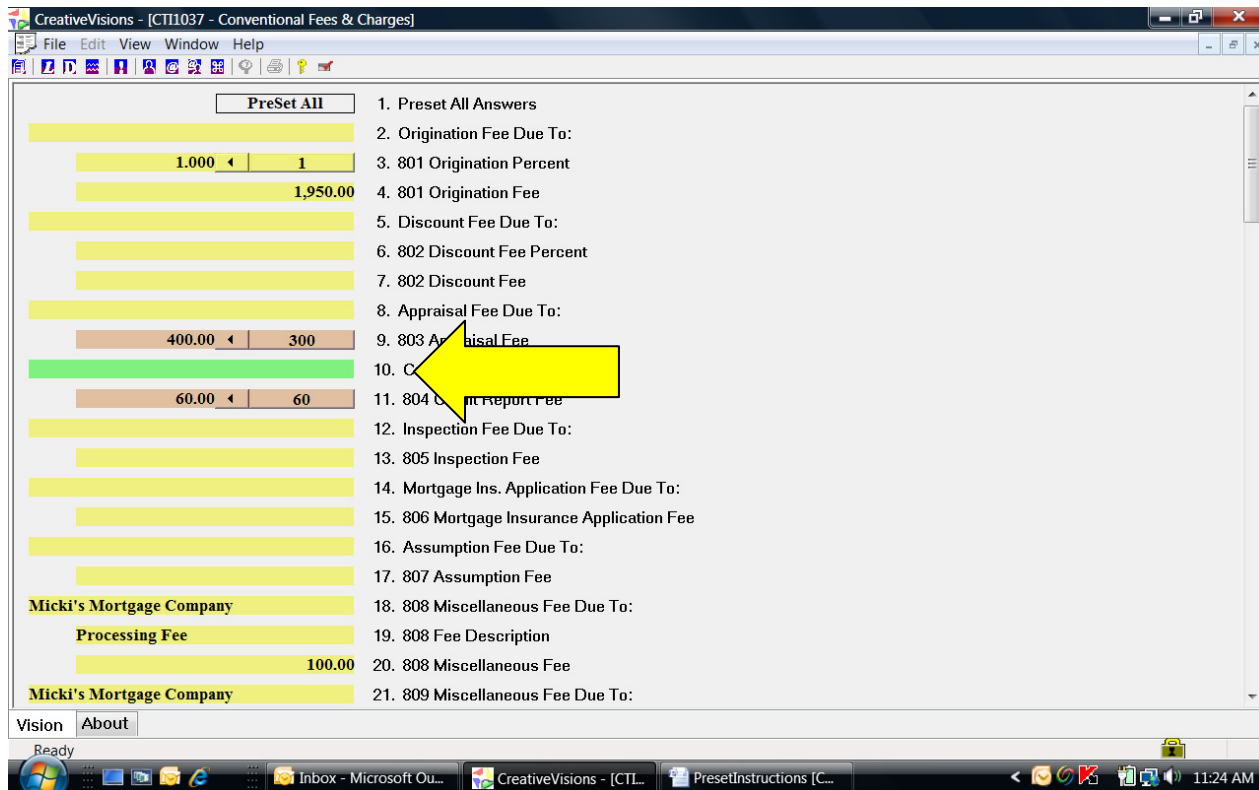
After tabbing to the next question, put your curser on the control and right click to see the list of choices

and click on 'Refresh Preset Definition'.
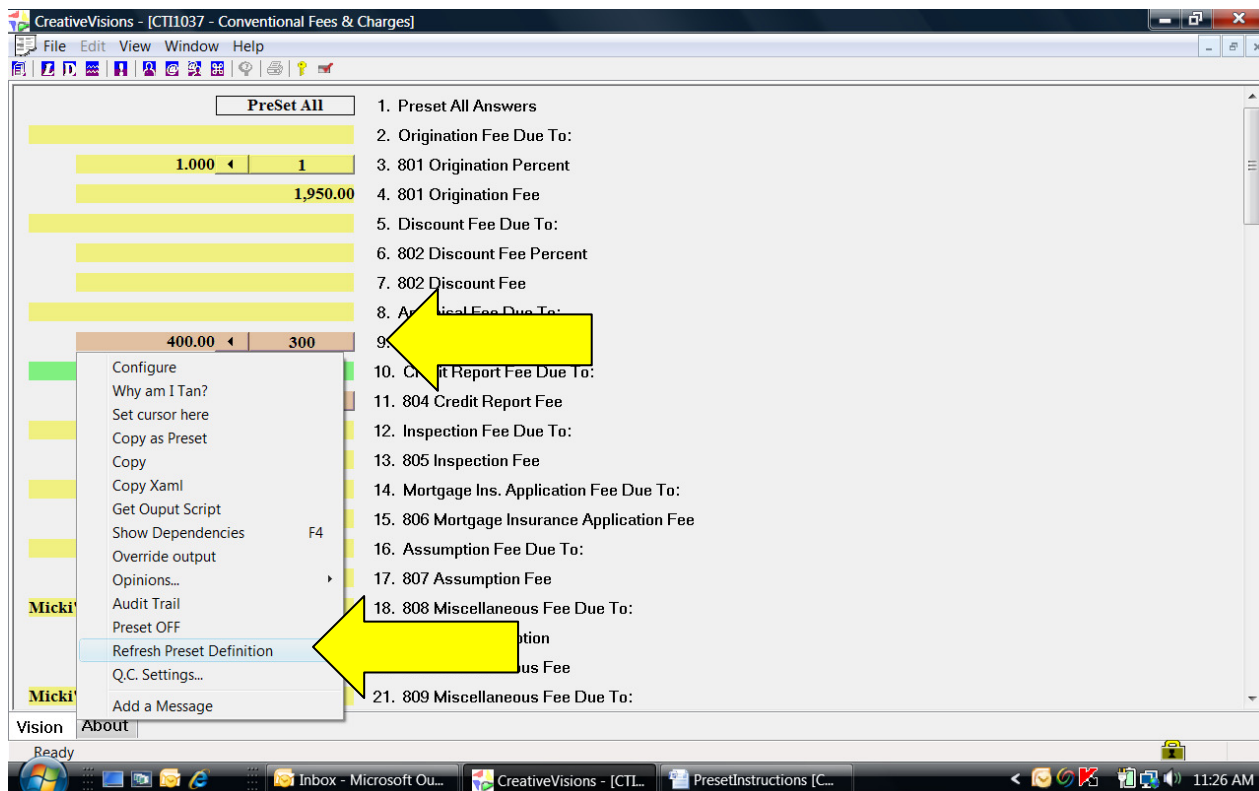
The preset answer will be refreshed to the new answer.