



Path December Release

The next Path software release is scheduled for production release on December 18th. Here is a sneak peek of a few things to expect in the latest version of Path...

- Updated Path Login Page
 - Path users will now be able to customize their login page to reflect their own branding
 - Users can now access Path News directly from the login page that will feature upcoming release notes, tips & tricks, webinars and other resources.
- A new Interim Servicing screen
 - The new screen will provide users with a worksheet to view and manage interim servicing transactions, such as escrow disbursements and loan payments.
- New Summary screens for Underwriting, Closing, Lock and Origination
 - These new screens will provide the necessary information for each role to improve the workflow and efficiency of the



Vendor Spotlight: Insellerate

Insellerate is a CRM, Lead Management and Engagement platform directly integrated into Path. Insellerate's platform handles all lending channels – retail, wholesale, TPO, consumer direct and reverse—and its advanced APIs allow seamless connectivity to your tech stack. Insellerate empowers loan officers to engage more effectively with real estate agents and borrowers, resulting in higher lead conversion rates, lower origination costs and more closed loans.

[Learn more >>](#)

Introducing Path TPO

Thinking about third-party originations (TPOs), but not sure you're ready to set up a TPO channel? As a Path customer, you have access to our newly launched Path TPO, a fully configurable TPO channel. With Path TPO, Path users can partner with third-party originators to generate loans in a secure, compliant, and seamless workflow that increases

overall origination process.

[Click here](#) to access a preview of the pre-release notes.

their lending power and leverages your employees' productivity.

Path TPO offers both a standard and a more robust option configured to your workflow.

[Learn more >>](#)

Coming soon...Zip 2.9

Zip 2.9 will be available next month. This release includes several new features that give administrators greater flexibility and control over the Zip landing pages of each LO and the ability to use Google Analytics to track how borrowers use the borrower portal.

Stay tuned for more details in the coming weeks.



Happy Holidays from everyone at Path.

Our offices will be closed December 23-26 in observance of the holidays.

Tips & Tricks

Document Requests in Path

Through the **Documents** activity, you can create and send document requests to borrowers.

[Adding Document Requests](#)

To add a document request:

1. Open a loan and select the Documents activity.
The document repository is displayed.

Production Lock Compliance Conditions Documents Checklist Interform Messages

Loan Number: 18983 Borrower: Nancy System Wong Lock Status: Not Locked Lock Expires:

Drag a column header and drop it here to group by that column

Document	Borrower	Category	Type	Description	By	Status	Status Date & Time	Updated Date & Time	Review Date & Time	Due Date	Document Date	Expiration Date	Comment	Attached
<input type="checkbox"/>	W-8 Request for Taxpayer ID (Ca Borrower)	W-8 req	Form	W-8 Request for Taxpayer ID (Ca Borrower)	System	Added from Library	06/18/2021 1:52:25 PM	06/18/2021 1:50:18 PM						
<input type="checkbox"/>	W-8 Request for Taxpayer ID (Ca Borrower)	W-8 req	Form	W-8 Request for Taxpayer ID (Ca Borrower)	System	Added from Library	06/18/2021 1:49:43 PM	06/18/2021 1:49:37 PM						
<input type="checkbox"/>	VA Loan Analysis (VA 26-4383)	VA Loan System	Form	VA Loan Analysis (VA 26-4383)	System	Document Export	12/11/2020 4:54:57 PM	10/15/2020 3:32:34 PM				06/13/2021	0000	
<input type="checkbox"/>	VA Loan Analysis (VA 26-4383)	VA Loan System	Form	VA Loan Analysis (VA 26-4383)	System	Document Export	06/29/2020 11:27:18 PM	06/26/2020 4:46:34 PM	06/18/2020 12:21:53 AM			06/13/2021	0000	
<input type="checkbox"/>	Requesting	W-8 req	Title	Survey	System	Document Export	01/13/2022 9:31:14 PM	10/11/2021 12:48:40 PM					Requesting Title	Condition
<input type="checkbox"/>	Request 9	Borrower	Correspondence	System	Document Request Overdue	Document Request Overdue	02/03/2022 9:54:26 AM	01/10/2022 2:44:49 PM		01/19/21			Condition	
<input type="checkbox"/>	Primary Borrower's 2 years 192	Income	P&L	System	Document Request Overdue	Document Request Overdue	11/18/2021 12:35:24 PM	10/19/2021 12:10:58 PM		11/16/21			Full Comment	Condition

File Drop Zone (Add from Computer)

2. Click Document Request.
The **Document Request** lightbox appears.

Document Request

Nancy Wong

Document Request(s) to Be Sent

Description	Borrower	Category	Type	Status	Due Date	Comment
<input type="checkbox"/> Bills	Nancy Wong	Income	P&L	Document Request Updat...	11/30/2021	

3. Click the Add button.
The **New Document Request** lightbox appears

New Document Request

Document

Borrower

Category

Due Date

Comments

Type

Status

4. Enter the *Document* name.

5. Click the select icon () of the *Borrower* field.
The **Select Borrower** lightbox appears.
6. Select the check box of the borrower.
7. Click **Select**.
8. Select the *Category*.
9. Select the *Type*.
10. Enter the *Due Date* of the requested document.
11. Enter additional information in the *Comments* field, if you have any.
12. Click **Add & Close** if this is the only document request you are adding, or click **Add & New** to finish adding this request and add another one. The document request is added to the *Document Request(s) to Be Sent* table, in the **Document Request** lightbox.