

CD XCHANGE NAVIGATION FOR SETTLEMENT AGENTS

CD Xchange is a proactive collaboration solution for preparing the Closing disclosure.

Get started here: GRI = <https://cdxchange.guaranteedrate.com> / GRA = <https://cdxchange.grarate.com>
PR = <https://cdxchange.properrate.com>



REGISTER AND SIGN INTO YOUR ACCOUNT

Sign In Register Why?

Email:

Password:

min. 6 Characters

Re-Enter Password:

Sign Up

Close Lost Password

Register with your email address and select a password

NOTE: The email address you register with will be used to identify loans assigned to you

For optimal performance use Internet Explorer 9+ or Google Chrome

Sign in with your email and password that you registered with

NOTE: Use the Lost Password if you forgot your password

Sign In Register Why?

Username or Email:

Password:

Sign In

Close Lost Password



Internet Explorer 9+ Google Chrome



NAVIGATING THE DASHBOARD

Click the dashboard to view all loans assigned to you

Click Help for FAQs and additional resources

Use the search feature to find loans by GRC loan number



View all loans that are assigned to you, along with additional information:

- ▶ **Loan #:** Guaranteed Rate Company Loan number
- ▶ **Borrower(s):** Main borrower's last name
- ▶ **Purpose:** Loan purpose
- ▶ **Est. Closing Date:** Estimated closing/signing date
- ▶ **Status:** Current fee collaboration status
- ▶ **Updated:** Most recent update: Date and time
- ▶ **By:** Who made the last update

Select the blue link to open any loan

Use the sort arrows to arrange loans based on that category

Loan #	Borrower	Purpose	Est. Closing	Status	Updated (local)	By	LO
151395225	Secher	Refinance	2015-12-10	Submit to Agent	2015-12-07 12:25 pm	encompass	Joanne Rogers
151344439	Kirilichin	Purchase	2015-12-10	Submit to Lender - Agent Approved	2015-12-04 10:45 am	encompass	Fred Burt
151381816	PEARSON	Refinance	2015-12-10	Submit to Lender - Agent Approved	2015-12-04 6:17 pm	encompass	Michael Gambatese
151389647	Huff	Refinance	2015-12-10	Submit to Lender - Agent Approved	2015-12-05 7:37 pm	encompass	Andrew Warrick

Color code for rows: Unchanged for 24 hrs Unchanged for 48 hrs Unchanged for 72 hrs

USING THE NOTES AND STATUS SECTION

Use the Notes:

- ▶ To communicate any questions or comments
- ▶ Review all communication during the collaboration process

Update the **Status** to indicate the progress of the loan

Statuses:

- ▶ **Submit to Agent:** Loan is with the Settlement Agent for fee entry
- ▶ **Submit to Lender – Agent Approved:** All fees are approved by the Settlement Agent
- ▶ **Lender Approved:** Loan is locked for fee editing and Closing Disclosure will be issued

Notes

2015-08-07 18:34:30 Just pulled the loan into Trident
daffy.duck v1

Comments/Questions... Add Note

Show differences to previous version with a green background. Hover for previous value.

Status: [Dropdown menu]

- Submit to Agent
- Submit to Lender - Agent Approved
- Lender Approved

Save Undo

Document Version: 3 [Dropdown menu]

was: <empty>

\$675.00

View previous versions
Even make an older version the current version if changes were made in error

Make Current

Quickly view changes from the previous version by clicking this box
Hovering over any green indicated section will show the previous entry

Before exiting a loan review all changes, update the status and click save to notify all parties that updates have been made

EMAIL NOTIFICATIONS

Settlement Agents are notified via email once added to the loan for collaboration and once collaboration is complete