

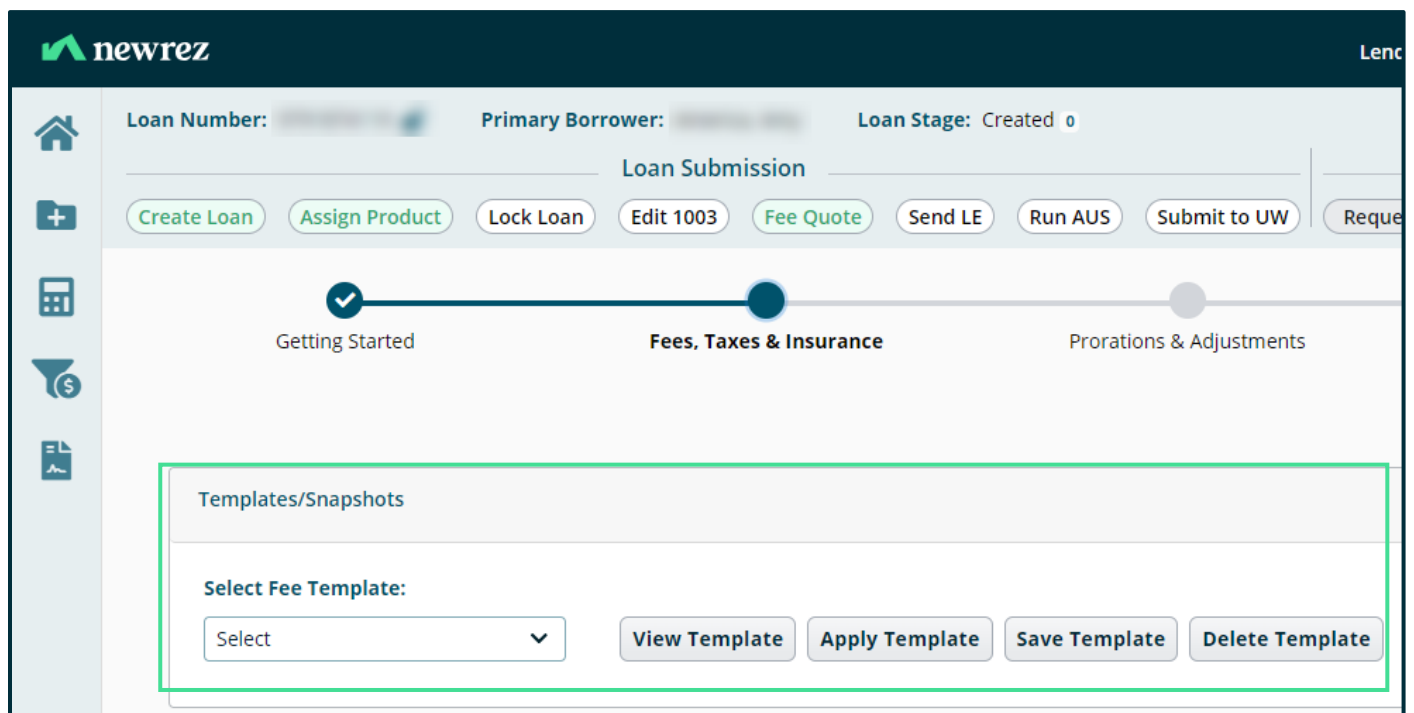
Blueprint: Fee Templates



The Blueprint Portal is an exclusive platform that makes it even easier to do business with Newrez. This job aid provides guidance for Non-Delegated (CL1) users to be able to utilize fee templates in Blueprint.



FeeQuote needs to be run the **Getting Started** screen to import all base default fees for all loans.



The screenshot displays the Newrez Blueprint portal interface. At the top, the Newrez logo is on the left, and the user's name 'Lenc' is on the right. Below the logo, there are fields for 'Loan Number:', 'Primary Borrower:', and 'Loan Stage: Created 0'. A 'Loan Submission' section contains several buttons: 'Create Loan', 'Assign Product', 'Lock Loan', 'Edit 1003', 'Fee Quote', 'Send LE', 'Run AUS', 'Submit to UW', and 'Request'. A progress bar below these buttons shows three steps: 'Getting Started' (completed with a checkmark), 'Fees, Taxes & Insurance' (current step), and 'Prorations & Adjustments'. A green box highlights the 'Templates/Snapshots' section, which includes a 'Select Fee Template:' dropdown menu with 'Select' as the current choice, and four buttons: 'View Template', 'Apply Template', 'Save Template', and 'Delete Template'.



Save a Fee Template

Step

- 1 Update Fee Screen**
 - Ensure the Settlement Service Provider and fee amounts have been updated to the desired providers and/or amounts.

▼ C. Services Borrower Can Shop For - \$3,775.00 (4)

Type	APR	SSP	Paid To	Paid By	POC	Due at Closing	Total	
Title - Closing Protection Letter (APR)	<input checked="" type="checkbox"/>	First American Title	Other	Borrower	\$0.00	\$50.00	\$50.00	...
Title - Lender Title Insurance	<input type="checkbox"/>	First American Title	Other	Borrower	\$0.00	\$2,055.00	\$2,055.00	...
Title - Settlement Fee (APR)	<input checked="" type="checkbox"/>	First American Title	Other	Borrower	\$0.00	\$1,470.00	\$1,470.00	...
Title - Title Endorsement	<input type="checkbox"/>	First American Title	Other	Borrower	\$0.00	\$200.00	\$200.00	...

- 2 Save the Fees, Taxes & Insurance Screen**
 - Click and select Save.

Getting Started **Fees, Taxes & Insurance** Prorations & Adjustments Preview LE Additional Disclosures Generate Disclosures

Add Fees **Save & Next** **Save**

Templates/Snapshots

Select Fee Template:
 Select

Evaluate Max Points and Fees Lender Fees Waived Modify/Override Fee Quote

By continuing to the next step, you acknowledge that you have disclosed all customary fees or other fees to the transaction in section "H. Other Fees"

▼ A. Origination - \$695.00 (2)

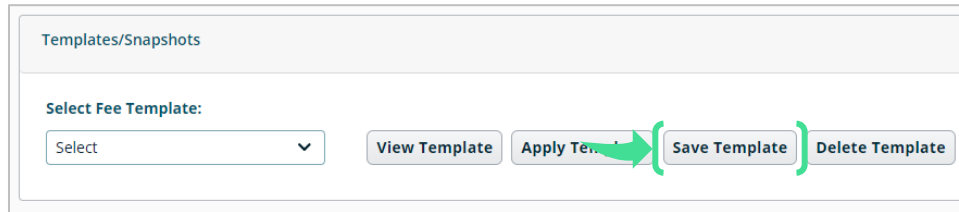
Type	APR	Paid To	Paid By	Points	Due at Closing	Total	
DISCOUNT FEE (APR)	<input checked="" type="checkbox"/>	Lender	Borrower		\$0.00	\$0.00	...
Loan Origination Fee (APR)	<input checked="" type="checkbox"/>	Originator	Borrower		\$695.00	\$695.00	...



Step

3 Save Template

- Click **Save Template**.



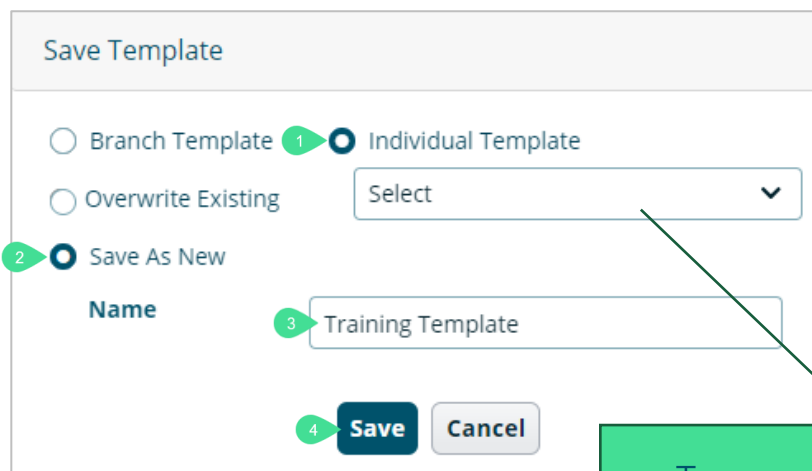
Templates/Snapshots

Select Fee Template:

Select

4 Name Template

- Select **Individual Template**.
- Ensure **Save As New** is selected.
- Enter desired template name.
- Click **Save**.



Save Template

Branch Template 1 Individual Template

Overwrite Existing

2 Save As New

Name 3

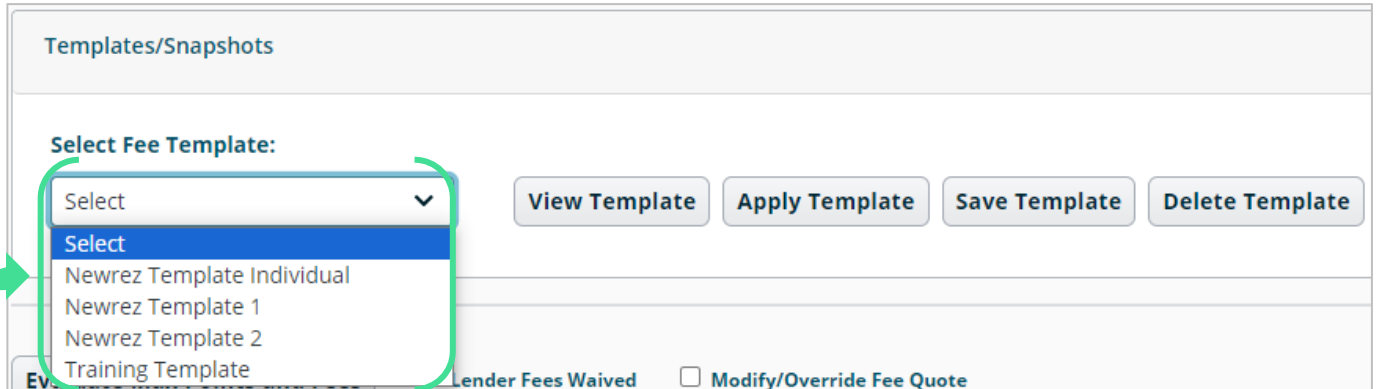
4

To overwrite fees from an existing template, select the template from the Overwrite Existing dropdown and then click save.

View, Apply, Delete a Fee Template

Step

1 Select desired template from Fee Template dropdown



Templates/Snapshots

Select Fee Template:

Select

Newrez Template Individual

Newrez Template 1

Newrez Template 2

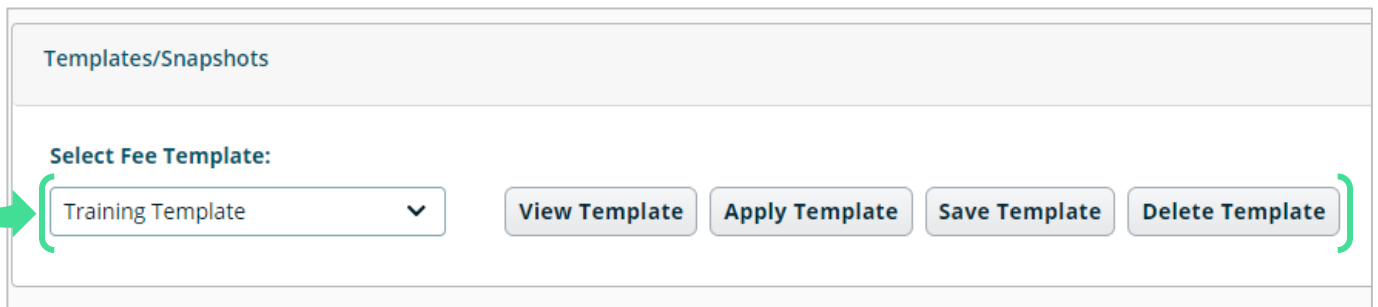
Training Template

View Template Apply Template Save Template Delete Template

EV Lender Fees Waived Modify/Override Fee Quote

2 Choose Action

- Click **View Template** to see a pop-up preview of the template.
- Click **Apply Template** to replace FeeQuote with SSP/fees from the selected template.
- Click **Delete Template** to remove the template from the dropdown list.



Templates/Snapshots

Select Fee Template:

Training Template

View Template Apply Template Save Template Delete Template



Record of Revisions

Revision Date:	Revision Reason:	Created By:	Approved By:	Effective Date:
7/8/2024	Created	Brian Rummell	Bob Long	7/19/2024

