

Combining Doc Uploads from BSM

Say your borrower has taken multiple photos and uploaded through the BSM portal, now you have several PDFs in eDocs for the same condition.

For example, in BSM I can see the condition Tac Returns has 10 separate jpgs attached to the condition as seen below.

10/25/2019 Provide copy of complete 2018 tax returns, including all pages. (Rachel) Tax Returns

- 10/28/2019 @ 1:06:28 pm - DARREN TAYLOR.jpeg ✖
- 10/28/2019 @ 1:06:20 pm - DIANE WENNER.jpeg ✖
- 10/28/2019 @ 1:06:15 pm - James Stachelek.jpg ✖
- 10/28/2019 @ 1:05:44 pm - Doug Rose.jpg ✖
- 10/28/2019 @ 1:05:36 pm - jo Mineo.jpg ✖
- 10/28/2019 @ 1:05:30 pm - Monica Cisneros.jpg ✖
- 10/28/2019 @ 1:05:25 pm - kw Valley Realty.jpg ✖
- 10/28/2019 @ 1:05:19 pm - Ridgeeco properties logo. ✖

Meanwhile in LQB these will sync as 10 separate PDFs.

https://edocs.lendingqb.com/?loanid=2417c1b0-25d9-475f-b325-aaf100bead83 - SAMPLE, RACHEL - LEA - Internet Explorer

Active Docs		Rejected/Obsolete Docs									
Status	Folder	Doc Type	Borrower	Description	Internal Comments	Associated Conditions	Pages	Last Modified	Uploaded Date	Uploaded By	
action...	INCOME	TAX RETURNS	RACHEL SAMPLE	Tax Returns (Rachel)		3. Provide copy of...	1	10/28/2019 10:07:18 AM	10/28/2019 10:07:18 AM	Be Smartee	
action...	INCOME	TAX RETURNS	RACHEL SAMPLE	Tax Returns (Rachel)		3. Provide copy of...	1	10/28/2019 10:07:17 AM	10/28/2019 10:07:18 AM	Be Smartee	
action...	INCOME	TAX RETURNS	RACHEL SAMPLE	Tax Returns (Rachel)		3. Provide copy of...	1	10/28/2019 10:07:18 AM	10/28/2019 10:07:18 AM	Be Smartee	
action...	INCOME	TAX RETURNS	RACHEL SAMPLE	Tax Returns (Rachel)		3. Provide copy of...	1	10/28/2019 10:07:17 AM	10/28/2019 10:07:18 AM	Be Smartee	
action...	INCOME	TAX RETURNS	RACHEL SAMPLE	Tax Returns (Rachel)		3. Provide copy of...	1	10/28/2019 10:07:19 AM	10/28/2019 10:07:18 AM	Be Smartee	
action...	INCOME	TAX RETURNS	RACHEL SAMPLE	Tax Returns (Rachel)		3. Provide copy of...	1	10/28/2019 10:10:25 AM	10/28/2019 10:10:26 AM	Be Smartee	
action...	INCOME	TAX RETURNS	RACHEL SAMPLE	Tax Returns (Rachel)		3. Provide copy of...	1	10/28/2019 10:07:18 AM	10/28/2019 10:07:18 AM	Be Smartee	
action...	INCOME	TAX RETURNS	RACHEL SAMPLE	Tax Returns (Rachel)		3. Provide copy of...	1	10/28/2019 10:07:18 AM	10/28/2019 10:07:19 AM	Be Smartee	

How can we resolve this? Follow the steps below in LQB to reorganize the data upload.

1. Open said file in LQB.
2. Go into the eDocs folder.
3. Open one of the pages that need to be combined.
4. Click “action...” on one of the files, and from the drop-down options choose the “open editor”.

Active Docs		Rejected/Obsolete Docs										
Search:		Show documents from		All Folders	View: <input type="radio"/> stack order <input checked="" type="radio"/> alphabetical							
Status	Folder	Doc Type	Borrower	Description	Internal Comments	Associated Conditions	Pages	Last Modified	Uploaded Date	Uploaded By		
<input type="checkbox"/>	action... view pdf open editor audit history delete	INCOME	TAX RETURNS	RACHEL SAMPLE	Tax Returns (Rachel)		1	10/28/2019 10:07:18 AM	10/28/2019 10:07:18 AM	Be Smartee		
<input type="checkbox"/>	action...	INCOME	TAX RETURNS	RACHEL SAMPLE	Tax Returns (Rachel)	3. Provide copy of...	1	10/28/2019 10:07:17 AM	10/28/2019 10:07:18 AM	Be Smartee		
<input type="checkbox"/>	action...	INCOME	TAX RETURNS	RACHEL SAMPLE	Tax Returns (Rachel)	3. Provide copy of...	1	10/28/2019 10:07:18 AM	10/28/2019 10:07:18 AM	Be Smartee		
<input type="checkbox"/>	action...	INCOME	TAX RETURNS	RACHEL SAMPLE	Tax Returns (Rachel)	3. Provide copy of...	1	10/28/2019 10:07:17 AM	10/28/2019 10:07:18 AM	Be Smartee		
<input type="checkbox"/>	action...	INCOME	TAX RETURNS	RACHEL SAMPLE	Tax Returns (Rachel)	3. Provide copy of...	1	10/28/2019 10:07:19 AM	10/28/2019 10:07:18 AM	Be Smartee		

5. On the “Page Layout” tab there is an option “Insert Pages” click this. A pop-up window will appear with a list of all other files in the eDocs folder.

Edit Document - INCOME : TAX RETURNS

Internal Notes
Document Info
Page Layout

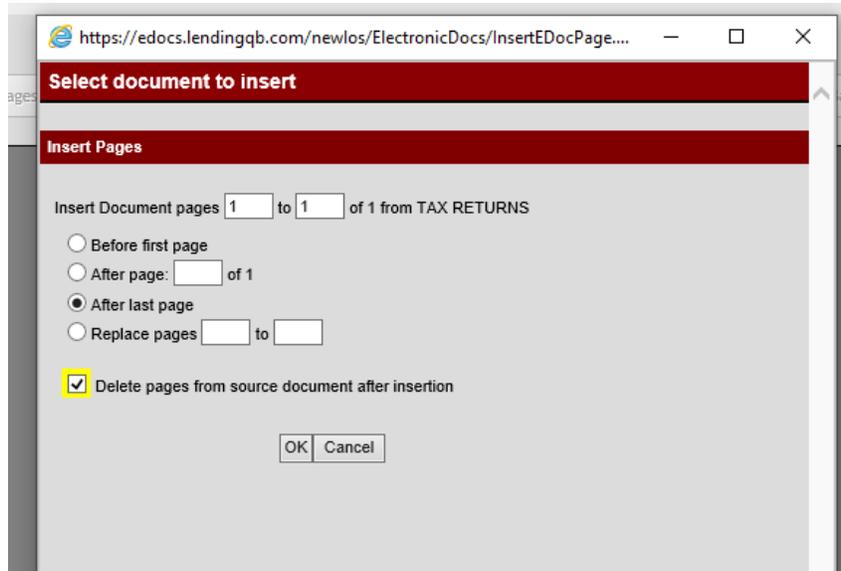


Select document to insert

	Doc Type	Internal Comments	Description	Last Modified	Pages
select view	W2'S		W2 (Rachel)	10/28/2019 9:58:12 AM	11
select view	TAX RETURNS		Tax Returns (Rachel)	10/28/2019 10:07:17 AM	1
select view	TAX RETURNS		Tax Returns (Rachel)	10/28/2019 10:07:17 AM	1
select view	TAX RETURNS		Tax Returns (Rachel)	10/28/2019 10:07:18 AM	1
select view	TAX RETURNS		Tax Returns (Rachel)	10/28/2019 10:07:18 AM	1
select view	TAX RETURNS		Tax Returns (Rachel)	10/28/2019 10:07:18 AM	1
select view	TAX RETURNS		Tax Returns (Rachel)	10/28/2019 10:07:19 AM	1
select view	TAX RETURNS		Tax Returns (Rachel)	10/28/2019 10:10:25 AM	1

6. Click the “Select” option beside one of the docs to combine. You can now choose where to insert the doc within the new file. In addition, you can also check the box “Delete pages from

source document after insertion.” This way the doc disappears from the eDocs list as you combine the files, note this will only update once you save. Once you click OK the page will populate in the specified order within the doc.



7. You now can repeat this step until you have added each page. So if I click  I will select the second item in the list and repeat checking the box etc.

Edit Document - INCOME : TAX RETURNS

Internal Notes | Document Info | Page Layout

Save | Print | **Insert Pages** | Delete Pages

	Doc Type	Internal Comments	Description	Last Modified	Pages
select view	W2'S		W2 (Rachel)	10/28/2019 9:58:12 AM	11
select view	TAX RETURNS		Tax Returns (Rachel)	10/28/2019 10:07:17 AM	1
select view	TAX RETURNS		Tax Returns (Rachel)	10/28/2019 10:07:17 AM	1
select view	TAX RETURNS		Tax Returns (Rachel)	10/28/2019 10:07:18 AM	1
select view	TAX RETURNS		Tax Returns (Rachel)	10/28/2019 10:07:18 AM	1
select view	TAX RETURNS		Tax Returns (Rachel)	10/28/2019 10:07:18 AM	1
select view	TAX RETURNS		Tax Returns (Rachel)	10/28/2019 10:07:19 AM	1
select view	TAX RETURNS		Tax Returns (Rachel)	10/28/2019 10:10:25 AM	1

Cancel

8. Once all docs have been added click the  button and all documents will combine under the file and eDocs window will refresh as seen below.

https://edocs.lendingqb.com/?loanid=2417c1b0-25d9-475f-b325-aaf100bead83 - SAMPLE, RACHEL - LEA - Internet Explorer

Active Docs **Rejected/Obsolete Docs**

Search: Show documents from View: stack order alphabetical

<input type="checkbox"/>	Status	Folder	Doc Type	Borrower	Description	Internal Comments	Associated Conditions	Pages	Last Modified	Uploaded Date	Uploaded By
<input type="checkbox"/>	action...	INCOME	TAX RETURNS	RACHEL SAMPLE	Tax Returns (Rachel)		3. Provide copy of...	9	10/28/2019 10:27:45 AM	10/28/2019 10:07:18 AM	Be Smartee
<input type="checkbox"/>	action...	INCOME	W2'S	RACHEL SAMPLE	W2 (Rachel)			11	10/28/2019 9:58:12 AM	10/25/2019 11:37:19 AM	Be Smartee

Restore deleted docs... Batch edit selected docs Copy selected docs to loan file Create editable copies