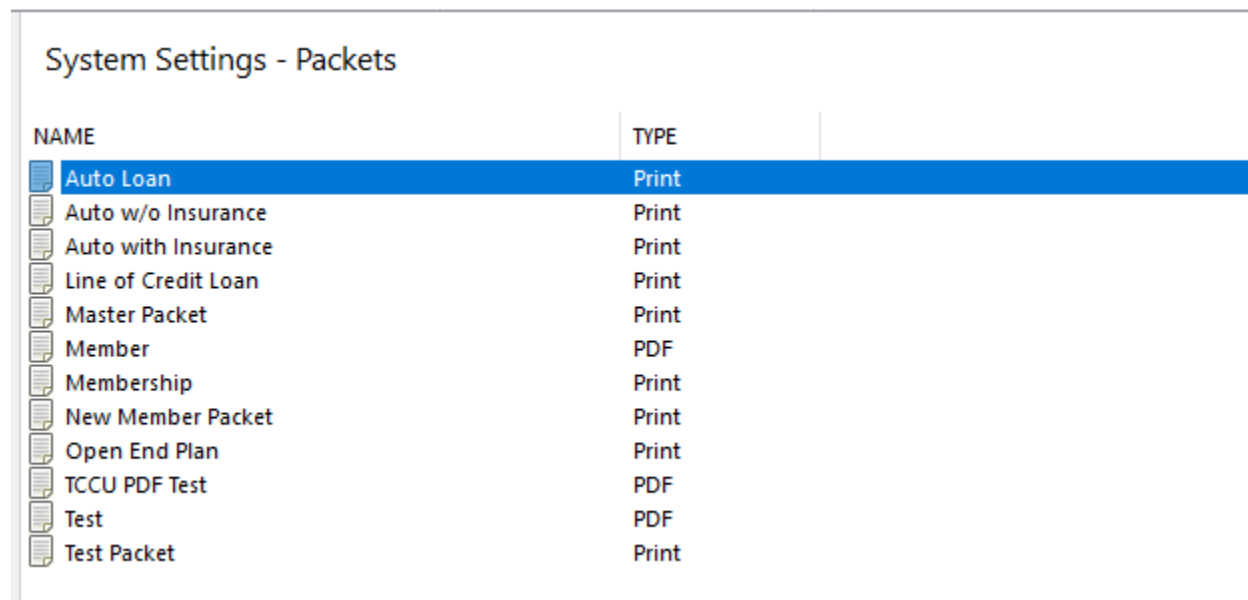# Packets

The Packets selection is used to select all the documents that are to be printed for a specific type of loan. This way a loan packet can be printed with one selection rather than one selection for each page of the document and each type of document to be included for the loan.

Only PDF Documents (fillable PDF's) can be made into a new Packet. However; existing PCL Packets can be edited, except for changing the order of the documents within the Packet.

When in Loan Application and "Print Application" is selected, only the loan application type documents (in the packet) will display in the window and be printed. When in Loan Documents and "Print Documents" is selected, only the loan document type documents (in the packet) will display in the window and be printed.

After making the selection, the system displays the existing packets already on the system.

System Settings - Packets

NAME	TYPE
Auto Loan	Print
Auto w/o Insurance	Print
Auto with Insurance	Print
Line of Credit Loan	Print
Master Packet	Print
Member	PDF
Membership	Print
New Member Packet	Print
Open End Plan	Print
TCCU PDF Test	PDF
Test	PDF
Test Packet	Print

Figure 1

This window can be used to make changes to an existing packet, to create a new packet or to delete a packet that is no longer needed.

Packet Types: Print = PCL
PDF = Fillable PDF

Add Packet

To add a new packet, click on the Add icon on the ribbon.

Figure 2

Enter a descriptive name for the new packet in the Packet Name field. Also, select the documents that are to be included in the packet. All of the loan application and loan documents that have been setup on the system are displayed. Other types of documents will <u>not</u> be displayed.

> The checkbox in the lower left corner for **Default documents to checked** is used to indicate whether or not the documents in a packet will be automatically checked in Loan Documents. If not checked, the individual documents to be printed will need to be checked by the loan staff in Loan Documents.

**Note: Some or all of the documents may need to be selected depending on which documents are needed for the packet being setup.
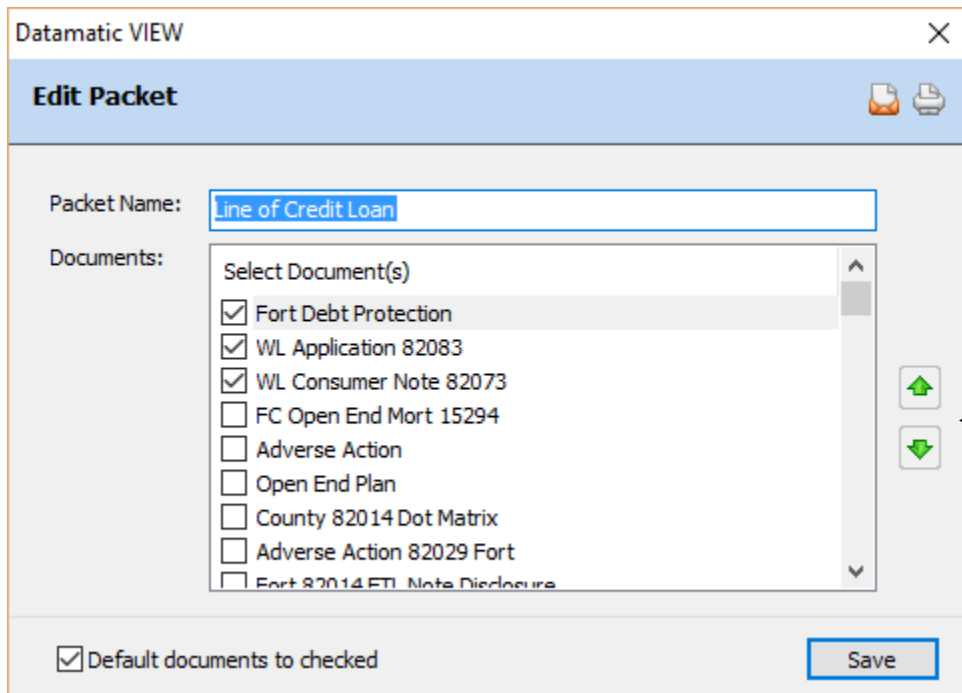
Select Save to save the changes.

The new packet is now displayed under [Main Ribbon > System Settings > Packets] in alphabetical order by the Packet Name.

Use the scroll bar on the right to display the packets that are not shown due to space limitations.

Edit Packet

To edit a packet, double click on the packet.

TIP: If the documents in a packet are not printing in the proper order, highlight the documents in the packet one at a time then use the up and down arrow keys to move the documents so that they display in the order that they should be printed. ****Note:** Only PDF packets can have the order changed, not PCL's.

Figure 3

Make the needed changes then select Save.

Delete Packet

To delete a packet, click on the delete icon on the ribbon.
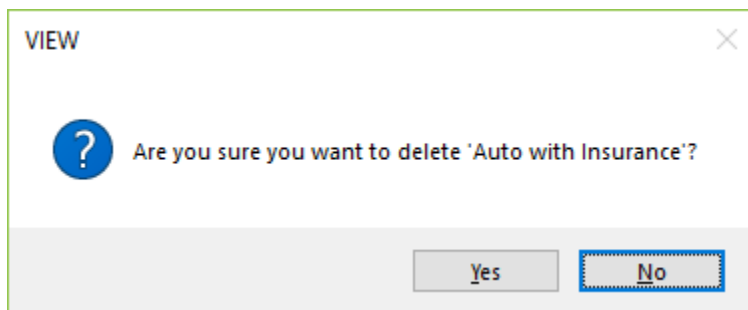
To proceed with deleting the packet, select yes. Otherwise, select no.