

Before You Begin

To ensure you are following the appropriate steps, select the scenario that matches your transaction.

Choose one of the following:

- **I am extending the term of a loan created in Lightning Docs.** → [Click here.](#)
- **I am extending the term of a loan that was not created in Lightning Docs.** → [Click here.](#)



How to Create a Basic Extension from an Existing Record

(For loans created **outside** of Lightning Docs, please see [page 7](#).)

- 1) Locate the record in which you would like to extend the maturity date. You can do this by using the search bar or scrolling through the list of existing records. Select the file.
- 2) You will then locate the purple “**SELECT APP**” button at the bottom of the loan information preview box. (See screenshot below).
- 3) From the dropdown menu, you will select “**Basic Extension**”. This will take you immediately into the interview for the Basic Extension application.

The screenshot displays a loan record summary with the following details:

- Borrower(s):**
1. ABC, LLC, a California limited liability company
- Lender(s):**
1. Lending Lender, LLC, a Texas limited liability company
- Property(ies):**
1. 123 Main Street, Palm Beach, Florida 00000 (owned by ABC, LLC, a California limited liability company)
2. 123 Sample Street, City, Louisiana 00000 (owned by ABC, LLC, a California limited liability company)
- Loan Amount:**
\$500,000.00
- Interest Rate:**
12%

Below the summary is a table with two columns: 'APP' and 'LAST MODIFIED'.

APP ↑	LAST MODIFIED
Master Loan	Apr 2, 2026 12:30 PM
Loan Documents and Closing Instructions.docx	
W9 ABC, LLC, a California limited liability company.pdf	
FCI Loan Servicing Compliance Form (Lending Lender, LLC).pdf	

Below the table, there is a section titled 'Add to this record...' containing a purple button labeled 'SELECT APP'. A dropdown menu is open below this button, showing three options: 'New York Building Loan', 'Modification', and 'Basic Extension'. A red arrow points from the 'Basic Extension' option to the 'SELECT APP' button.

- 4) You will now notice a preview of the loan information section at the top of the interview. This section should already be completed since information was copied from an existing record (see screenshot below).

CREATE AS TEST FILE? Selecting will create unenforceable loan documents. ?

☐ Yes ☒ No

Basic extension

This is the information already identified on the loan. If any of it looks incorrect, you must navigate to the respective portion of the interview and change the answers there. If everything in this review looks correct, then simply fill out the extension questionnaire below and hit complete; nothing else is required of you.

Borrower: Borrowton LLC, a California limited liability company

Lender: Lendcorp, a California limited liability company

Loan Amount: 1,250,000.00

Date of Original Loan Documents: February 2, 2026

Property Address: 123 Prop Pl, Propland, California 99999; and 321 Collateral Ln, Crossville, California 99999

IMPORTANT NOTE

Under the details of an existing loan record, you can add to the record by selecting “Basic Extension”, which will then prefill the below information.

- **Parties to the Transaction**
 - Borrower
 - Lender
- **Collateral**
 - Property Information
- **Standard Loan Terms**

It is **crucial** to review the pre-filled information in the above categories to ensure that it matches the **signed loan documents**. Signed loan documents determine final terms and information, so the extension must accurately reference the correct information. That way, anything corrected after the loan documents were downloaded will be accounted for.

- 5) As you scroll further, you will notice new fields where the Extension information can be completed.

This screenshot shows a form for entering extension agreement details. The 'Date of Extension Agreement' field is at the top with a date picker icon. Below it, a message states: 'Lightning Docs is automatically calculating the original maturity date as being on **March 1, 2026**. Would you like to manually change this?'. The 'No' radio button is selected. Further down, there is an 'Extension Maturity Date' dropdown menu. Below that is an 'Extension Fee, if any (entered as a dollar amount)' text input field. At the bottom, there are three input fields for 'Unpaid principal balance', 'Unpaid Accrued Interest (if any, otherwise leave blank)', and 'Unpaid Late Charges (if any, otherwise leave blank)'. The 'Have you previously extended this loan?' question at the bottom has the 'No' radio button selected.

- 6) **Original Maturity Date:** If the maturity date suggested by Lightning Docs (shown in bold above) is not correct, you may select “Yes” to manually update the maturity date. A new field titled “Original Maturity Date” will appear. Screenshot below:

This screenshot shows the same form as above, but with the 'Yes' radio button selected for the question 'Would you like to manually change this?'. A new field titled 'Original Maturity Date' has appeared, containing the date '11/01/2025' and a date picker icon. This field is highlighted with a red rectangular box. The 'Extension Maturity Date' dropdown and the bottom input fields remain visible.

PLEASE NOTE: ONLY the ORIGINAL MATURITY DATE of the loan should be entered into this field. Even if the loan has previously been extended, this date should reflect the *original maturity date*.

In the event that this extension is NOT the first extension of this loan, then you should select the Extension Maturity Date option to "Identify Specific Maturity Date" (screenshot below). **DO NOT** use the "Specify number of months to extend" option, as this will calculate the number of months from the Original Maturity Date.

Lightning Docs is automatically calculating the original maturity date as being on **May 1, 2026**. Would you like to manually change this?

☒ Yes ☐ No

Extension Maturity Date

- Identify specific maturity date
- Identify specific maturity date
- Specify number of months extended

Original Maturity Date: 11/01/2025

Specific maturity date: mm/dd/yyyy

A red box highlights the "Extension Maturity Date" dropdown menu, and a red arrow points to the "Identify specific maturity date" option.

- 7) Once you are satisfied with the information entered in the interview and are ready to download your documents, select the **"Create Docs"** button in the lower right-hand corner.

Loan Terms and Features

Do not use unless to correct pre-populated information to conform to existing loan documents.

Standard Loan Terms (click to edit)

Have questions about Lightning Docs?

CONTACT SUPPORT

Finish Later **Create Docs**

A red arrow points to the "Create Docs" button, which is highlighted with a red box.

- 8) You will now be redirected to your home screen, where you will see a new option to download your Basic Extension using one of the options highlighted below.

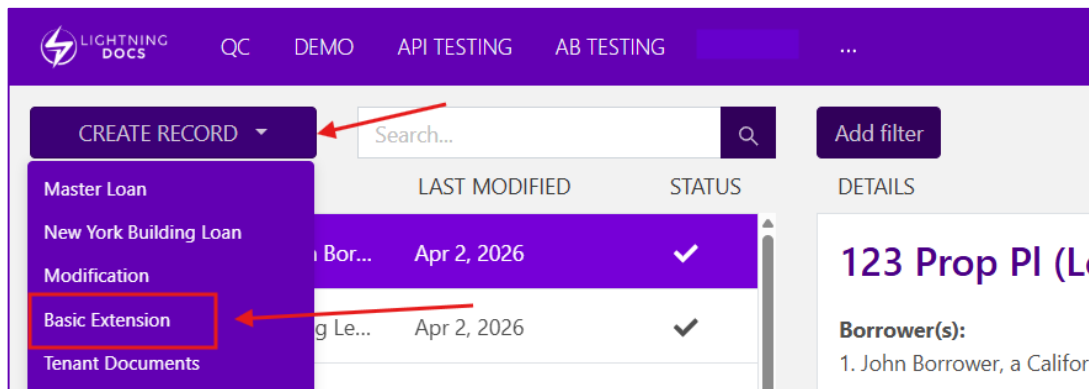
Loan Amount: \$1,250,000.00			
Interest Rate: 12%			
APP ↑	LAST MODIFIED	STATUS	ACTION
Basic Extension  Basic Extension Agreement.docx	Apr 2, 2026 3:36 PM	Completed	Review or Update
			 Download
Master Loan  Loan Documents and Closing Instructions.docx  Allonge and Assignments.docx  UCC EPA (- California).docx  FCI Loan Servicing Compliance Form (Lendcorp).pdf	Apr 2, 2026 3:30 PM	Completed	Review or Update
			 Download All

If further assistance is needed, please reach out to support@lightningdocs.ai and we are happy to help!

How to Create a Basic Extension from Scratch

(For loans created within Lightning Docs, please see [page 2](#).)

- 1) Click the **“Create Record”** button located at the upper left-hand corner of your Lightning Docs homepage. From the dropdown menu, select **“Basic Extension”**.



- 2) A pop-up window will appear, prompting you to select a Scenario, the same as when creating a Master Document set. You may select if applicable or bypass by clicking the X in the upper right-hand corner.
- 3) You will now be brought to the **Basic Extension** interview. At the top of the interview, a preview of the loan information section appears. This section will look a bit strange as the information in the interview has not yet been completed (see screenshot below).

Basic extension

This is the information already identified on the loan. If any of it looks incorrect, you must navigate to the respective portion of the interview and change the answers there. If everything in this review looks correct, then simply fill out the extension questionnaire below and hit complete; nothing else is required of you.

Borrower: [_Borrower.names]

Lender: [_lenderInformation.AllNameInterest]

Loan Amount: [_loanAmount]

Date of Original Loan Documents: [_loanTerms.closingDate]

Property Address: [_propertyInformation.informationConcatenate]

Date of Extension Agreement

mm/dd/yyyy

Lightning Docs is automatically

This information will update once these fields are completed and either the “**Finish Later**” or “**Create Docs**” button has been clicked.

- 4) As you scroll further, you will notice new fields where the Extension information can be completed.

A screenshot of a web form titled "Date of Extension Agreement". It includes a date input field with a calendar icon, a text block explaining that the original maturity date is March 1, 2026, and asking if the user wants to manually change it (with "No" selected), an "Extension Maturity Date" dropdown menu, an "Extension Fee" input field, and three input fields for "Unpaid principal balance", "Unpaid Accrued Interest", and "Unpaid Late Charges". At the bottom, it asks "Have you previously extended this loan?" with "No" selected.

- 5) **Original Maturity Date:** If the maturity date suggested by Lightning Docs (shown in bold above) is not correct, you may select “Yes” to manually update the maturity date. A new field titled “Original Maturity Date” will appear. Screenshot below:

A screenshot of the same web form, but with the "Original Maturity Date" field highlighted by a red box. This field contains the date "11/01/2025". The "Yes" radio button for the manual change question is also highlighted by a red box. The "Extension Maturity Date" dropdown is visible below.

PLEASE NOTE: ONLY the ORIGINAL MATURITY DATE of the loan should be entered into this field. Even if the loan has previously been extended, this date should reflect the original maturity date.

In the event that this extension is **NOT** the first extension of this loan, then you should select the Extension Maturity Date option to "Identify Specific Maturity Date" (screenshot below). **DO NOT** use the specify number of months to extend option as this will calculate the number of months from the Original Maturity Date.

The screenshot shows a web form for Lightning Docs. At the top, a message states: "Lightning Docs is automatically calculating the original maturity date as being on **May 1, 2026**. Would you like to manually change this?" Below this message are two radio buttons: "Yes" (selected) and "No". To the right, there is a date input field labeled "Original Maturity Date" with the value "11/01/2025" and a calendar icon. Below the radio buttons, there is a dropdown menu labeled "Extension Maturity Date". The dropdown menu is open, showing three options: "Identify specific maturity date" (highlighted in blue), "Identify specific maturity date", and "Specify number of months extended". A red arrow points to the first option in the dropdown menu. To the right of the dropdown menu, there is a date input field labeled "Specific maturity date" with the placeholder "mm/dd/yyyy" and a calendar icon.

IMPORTANT NOTE

It is **crucial** to review the loan information in the categories below to ensure that it matches the **signed loan documents**. Signed loan documents determine final terms and information, so the extension must accurately reference the correct information.

- **Parties to the transaction**
 - Lender
 - Borrower
- **Collateral**
 - Property Information
- **Standard Loan Terms**

- 6) Once you are satisfied with the information entered in the interview and are ready to download your documents, select the "**Create Docs**" button in the lower right-hand corner.

- 7) You will now be redirected to your home screen, where you will see a new option to download your Basic Extension using one of the options highlighted below.

Loan Amount: \$1,250,000.00			
Interest Rate: 12%			
APP ↑	LAST MODIFIED	STATUS	ACTION
Basic Extension	Apr 2, 2026 3:36 PM	Completed	Review or Update
 Basic Extension Agreement.docx			 Download

If further assistance is needed, please reach out to support@lightningdocs.ai and we are happy to help!