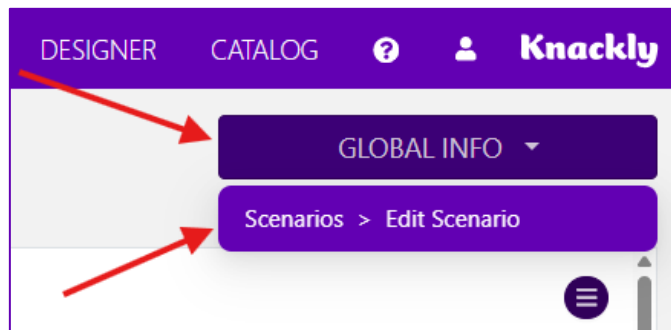


Scenarios (Loan Product Templates)

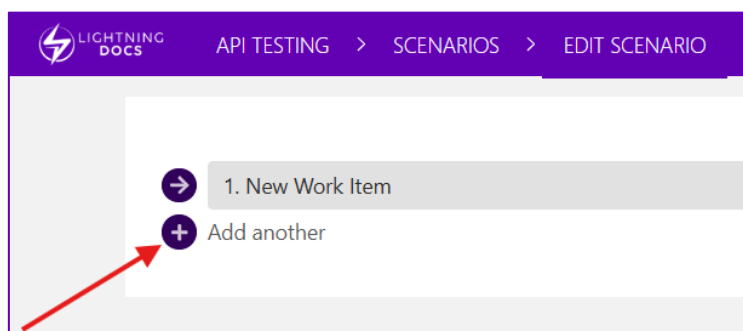
“**Scenarios**” can be a helpful tool for our Lightning Docs users who frequently use (or offer) the same loan terms and products across various transactions. This tool can help users reduce the potential for errors, such as typos, and cut down the time they are spending drafting loan documents. It also unlocks additional features to further customize documents to their needs.

CREATING A NEW SCENARIO

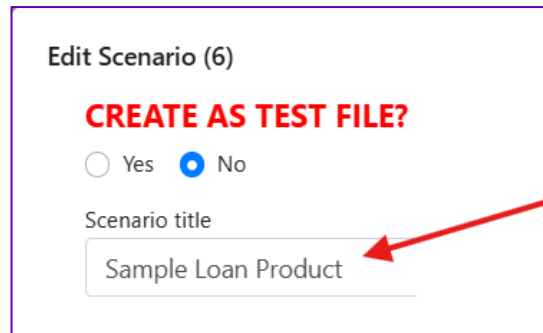
- 1) When logged into Lightning Docs, click on the **Global Info** drop down menu (top right-hand corner of the screen), and select the “**Scenarios > Edit Scenario**” option.



- 2) Once the Scenario tab is open, click the “**Add another**” button.



3) When prompted, give the scenario a title.



Edit Scenario (6)

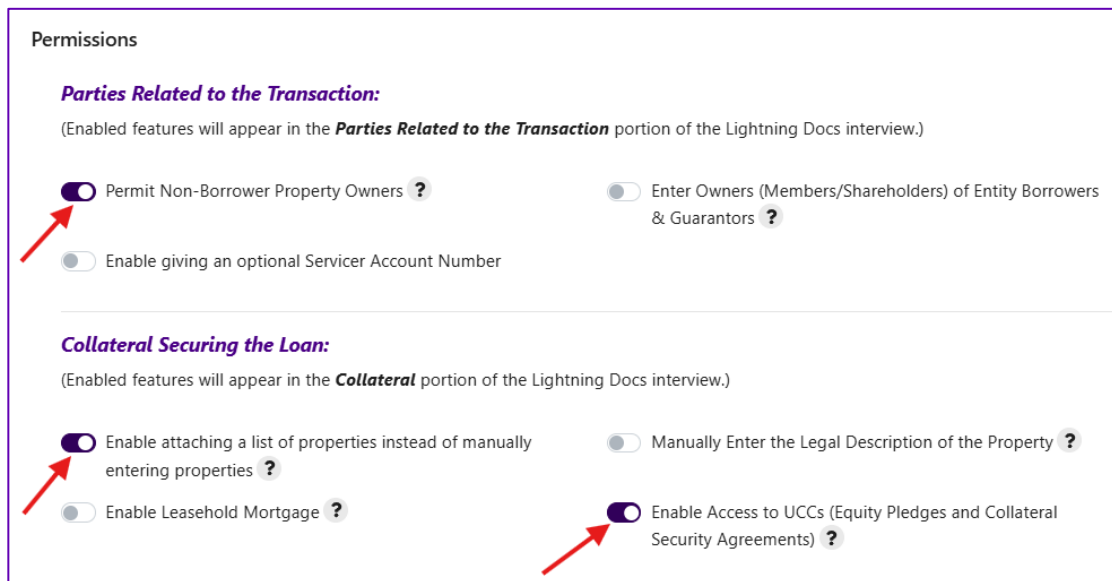
CREATE AS TEST FILE?

☐ Yes ☒ No

Scenario title

Sample Loan Product

4) **Permissions:** Enabling “Permissions” allows the user to provide their team with access to specific features that are less commonly used in average transactions. Toggling these switches ‘on’ (**Purple**) will trigger the specified feature to appear in your Lightning Docs interview when this loan scenario is selected.



Permissions

Parties Related to the Transaction:
(Enabled features will appear in the **Parties Related to the Transaction** portion of the Lightning Docs interview.)

☒ Permit Non-Borrower Property Owners ? ☐ Enter Owners (Members/Shareholders) of Entity Borrowers & Guarantors ?

☐ Enable giving an optional Servicer Account Number

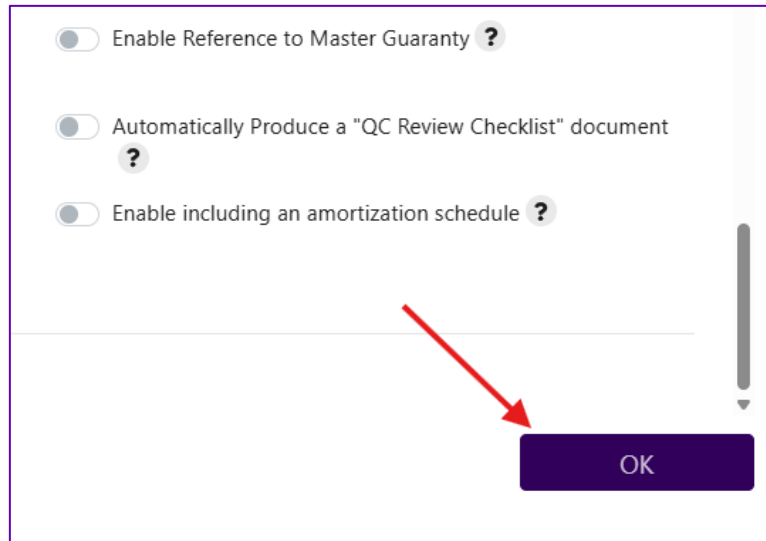
Collateral Securing the Loan:
(Enabled features will appear in the **Collateral** portion of the Lightning Docs interview.)

☒ Enable attaching a list of properties instead of manually entering properties ? ☐ Manually Enter the Legal Description of the Property ?

☐ Enable Leasehold Mortgage ? ☒ Enable Access to UCCs (Equity Pledges and Collateral Security Agreements) ?

Please note: Once enabled through permissions, these features will appear in the corresponding sections of the interview, as noted in the parentheses.

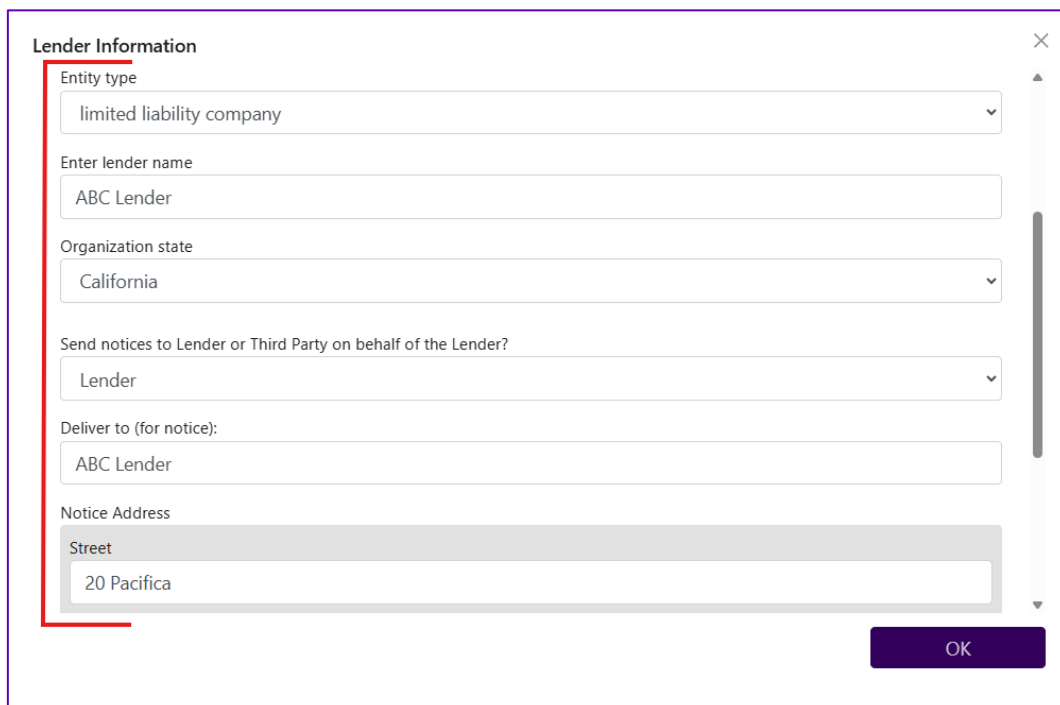
- 5) Click the “OK” button once satisfied with the permissions enabled.



A dialog box with a white background and a purple border. It contains three toggle switches, each with a question mark icon to its right. The first toggle is labeled "Enable Reference to Master Guaranty". The second toggle is labeled "Automatically Produce a 'QC Review Checklist' document". The third toggle is labeled "Enable including an amortization schedule". A red arrow points from the bottom right of the dialog box to a purple button labeled "OK".

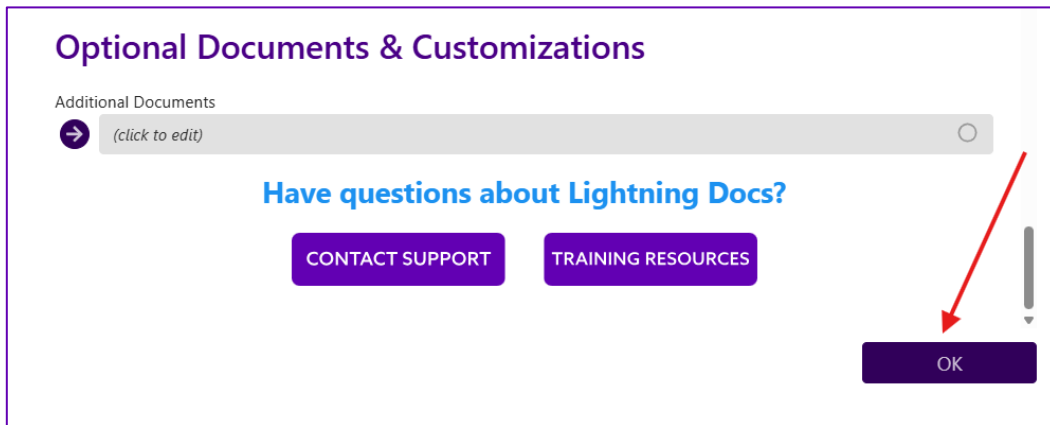
- 6) Proceed by completing the interview with any default information that the user would like to set.

For example, if a user would like to start a new interview with the same lender information prepopulated across multiple transactions, they can complete that portion of the scenario interview. You may choose to default any part of the interview as needed, including but not limited to yes/no options, text fields, and drop-down menus.

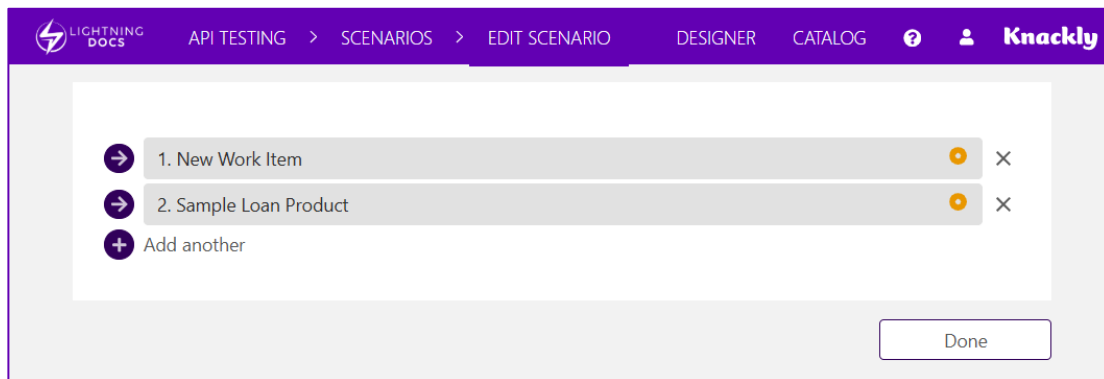


A form titled "Lender Information" with a close button (X) in the top right corner. The form contains several fields: "Entity type" (a dropdown menu with "limited liability company" selected), "Enter lender name" (a text field with "ABC Lender"), "Organization state" (a dropdown menu with "California" selected), "Send notices to Lender or Third Party on behalf of the Lender?" (a dropdown menu with "Lender" selected), "Deliver to (for notice):" (a text field with "ABC Lender"), and "Notice Address" (a text field with "20 Pacifica"). A red L-shaped line highlights the left side of the form. A purple button labeled "OK" is located at the bottom right of the form.

- 7) Once satisfied with all the information entered for this scenario, click the “**OK**” button in the bottom right-hand corner to complete the scenario.

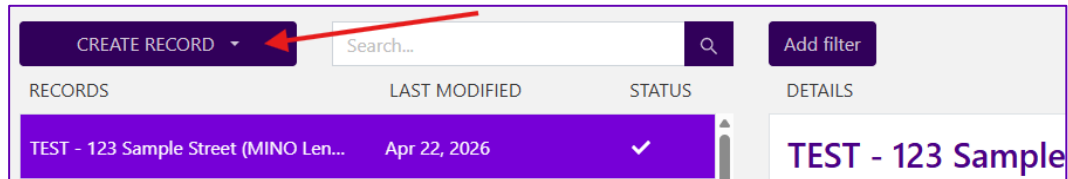


- 8) Click “**Done**” (bottom right-hand corner) to exit the scenario Builder page.



APPLYING A SCENARIO

- 1) Once the scenario is created, each will be available for application when creating a new transaction on Lightning Docs. Select “**Create Record**” to begin your new file.



- 2) The user will see a pop-up window which states “**Select an item below**” following a list with each existing scenario. Select the desired scenario to prefill the interview with all relevant permissions enabled and all relevant defaults set.

A screenshot of a pop-up window titled 'Select an item below' with a close button (X) in the top right corner. Below the title is a search bar with the placeholder text 'Filter by keyword'. Below the search bar are two radio button options: 'New Work Item' and 'Sample Loan Product'. At the bottom right of the window is a dark blue button labeled 'SELECT'.

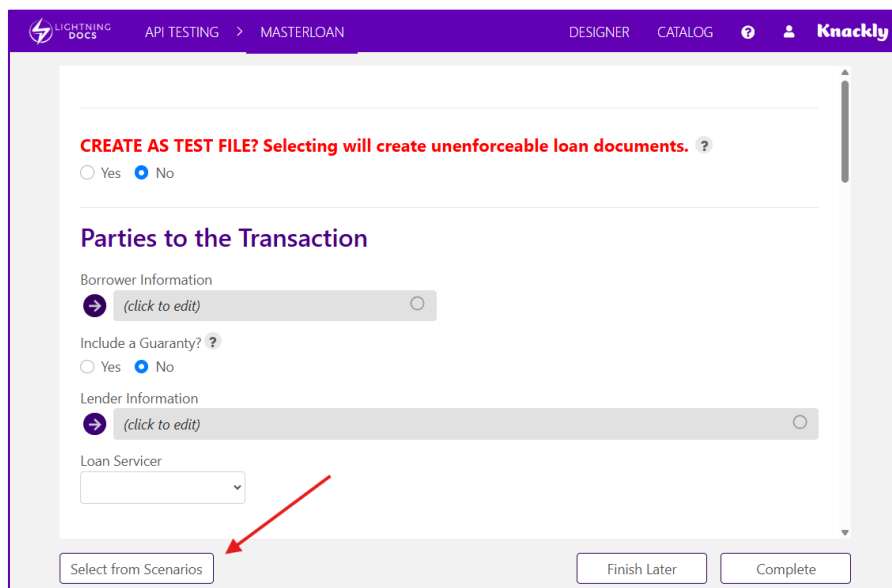
PLEASE NOTE

- 1) Scenarios can **only** be applied to files that have **not** previously had a scenario applied.
- 2) Updating a scenario will **not** affect files that already had the scenario applied **before** the updates were made.

In either case, users can contact the Support team for assistance with removing a scenario from a file or enabling a specific permission for a file that already has a scenario applied.

I FORGOT TO CHOOSE A SCENARIO

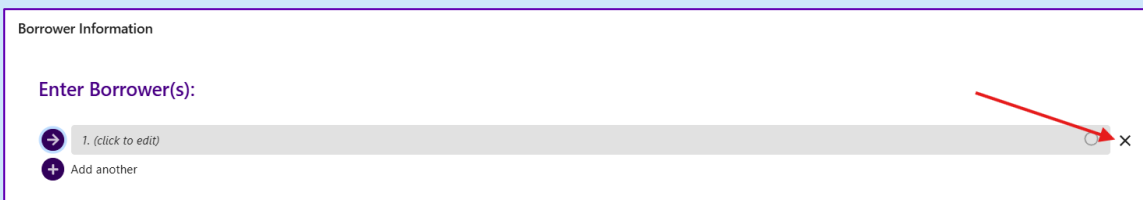
Forgot to select a scenario before starting your transaction? No problem! Simply select the appropriate scenario from the bottom-left corner of the interview. Your scenario will be applied, and you can continue with the interview.



The screenshot shows the Lightning Docs interface with the 'MASTERLOAN' scenario selected. The 'Parties to the Transaction' section includes fields for Borrower Information, Include a Guaranty?, Lender Information, and Loan Servicer. At the bottom left, there is a button labeled 'Select from Scenarios' which is highlighted by a red arrow. Other buttons at the bottom right are 'Finish Later' and 'Complete'.

PLEASE NOTE

When creating a new scenario, use caution when interacting with fields and features. For example, if the *Borrower Name* field is accidentally completed, the borrower item **must be deleted entirely** (as shown below) rather than simply clearing the text from the field.



The screenshot shows the 'Borrower Information' section with the prompt 'Enter Borrower(s):'. Below this, there is a list of borrower items. The first item is labeled '1. (click to edit)' and has a red 'x' icon next to it, which is highlighted by a red arrow. There is also an 'Add another' button below the list.

If the item is not deleted completely, it may cause issues when a scenario is selected **after** some or all of the Lightning Docs interview has been completed. The blank borrower item will **overwrite** any existing information, erasing it from the interview.

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