



BytePro User Guide

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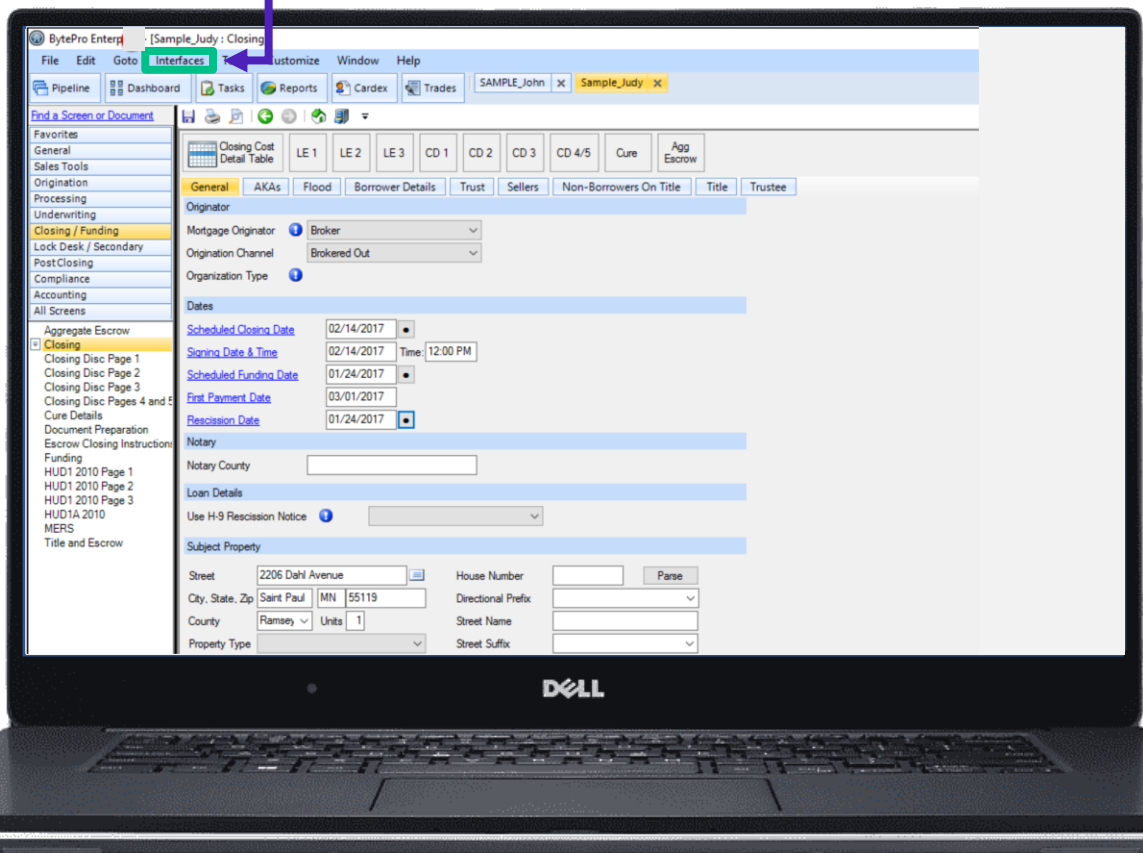
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# Generate Packages From Byte

## Getting Started

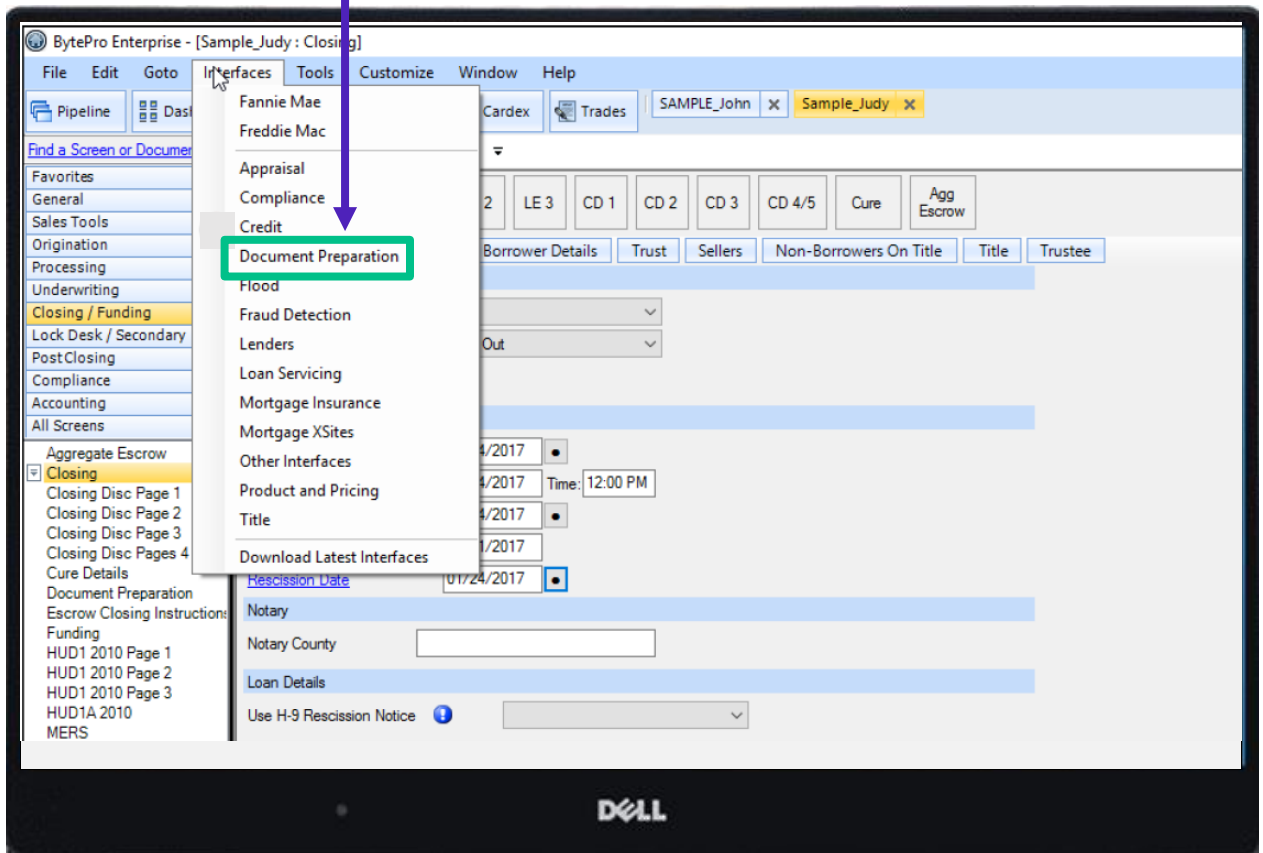
To generate documents in BytePro, start by clicking on the Interfaces option on the Byte toolbar.



# Generate Packages From Byte

Doc Prep

Select Document Preparation.



# Generate Packages From Byte

## Selecting DocMagic

Select DocMagic.

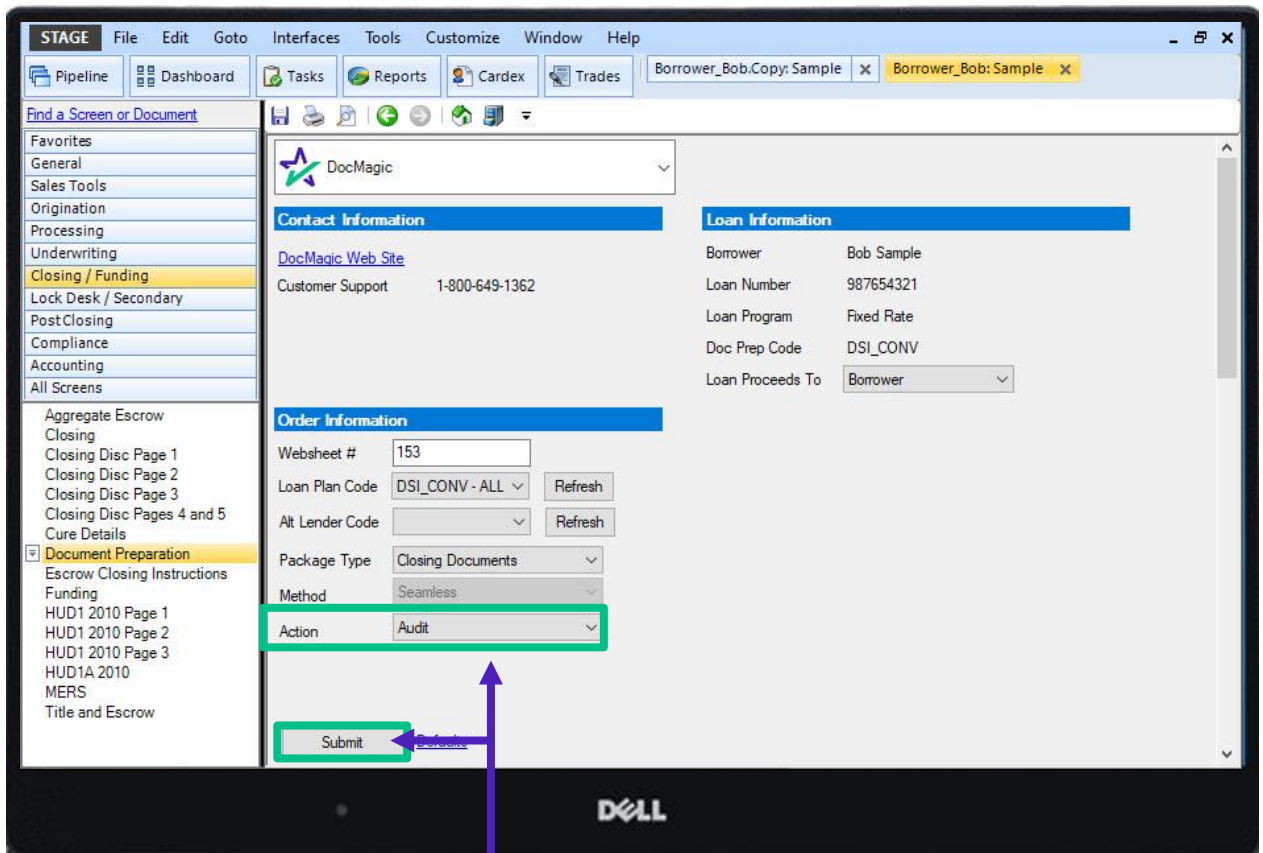
The screenshot displays the BytePro Enterprise software interface for document preparation. The window title is "BytePro Enterprise - [Borrower\_Bob : Document Preparation]". The menu bar includes "STAGE", "File", "Edit", "Goto", "Interfaces", "Tools", "Customize", "Window", and "Help". The toolbar contains icons for Pipeline, Dashboard, Tasks, Reports, Cardex, and Trades. The left sidebar lists various categories such as Favorites, General, Sales Tools, Origination, Processing, Underwriting, Closing / Funding, Lock Desk / Secondary, Post Closing, Compliance, Accounting, and All Screens. The main workspace is divided into several sections: "DocMagic" (highlighted with a green box), "Contact Information", "Loan Information", "Order Information", and "Closing Documents". The "DocMagic" section shows a dropdown menu with "DocMagic" selected. The "Contact Information" section includes fields for "DocMagic Web Site", "Customer Support", and "1-800-649-1362". The "Loan Information" section includes fields for "Borrower", "Loan Number", "Loan Program", "Doc Prep Code", and "Loan Proceeds To". The "Order Information" section includes fields for "Websheet #", "Loan Plan Code", "Alt Lender Code", "Package Type", "Method", and "Action". The "Closing Documents" section shows a dropdown menu with "Closing Documents" selected, and a list of document types including "Pre-closing", "Initial Disclosures", "Redisclosure", "Application", "Processing", "Adverse Action/Denial", "Pre-qualification", "Rate Lock", "Post-Closing", "Loan Estimate", "Closing Disclosure", "Compliance Review", "E-Sign Consent", and "Servicing Transfer".

Choose your package type from this drop-down menu.



# Generate Packages From Byte

## Auditing



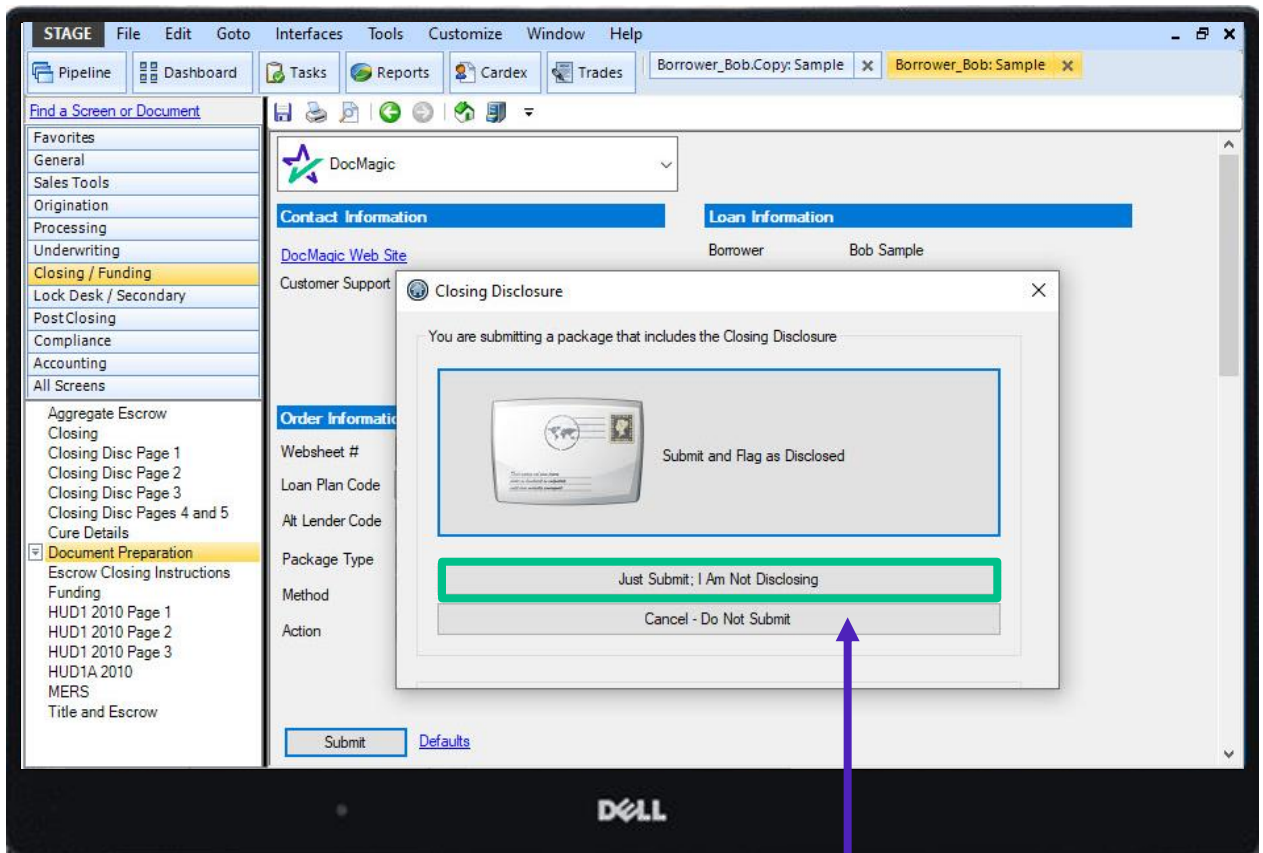
Select Audit under Action,  
then Submit.



# Generate Packages From Byte

## Auditing

A pop-up box will appear.



When running an Audit, select "Just Submit; I Am Not Disclosing" since the only action will be auditing the file.



# Generate Packages From Byte

## Auditing

Review the Audit messages in the Status Messages box.

The screenshot shows a software interface with a sidebar on the left and a main content area. The sidebar has a menu with items like 'General', 'Sales Tools', 'Origination', 'Processing', 'Underwriting', 'Closing / Funding', 'Lock Desk / Secondary', 'Post Closing', 'Compliance', 'Accounting', and 'All Screens'. Below the menu is a list of document preparation items, including 'Escrow Closing Instructions', 'Funding', 'HUD1 2010 Page 1', 'HUD1 2010 Page 2', 'HUD1 2010 Page 3', 'HUD1A 2010', 'MERS', and 'Title and Escrow'. The main content area has a header 'Order Information' with fields for 'Websheet #' (108), 'Loan Plan Code' (DSI\_CONV - ALL), 'Alt Lender Code', 'Package Type' (Initial Disclosures), 'Method' (Seamless), and 'Action' (Audit). There are 'Submit' and 'Defaults' buttons. Below this is a 'Status Messages (double-click to view long messages)' section containing a table of audit messages.

Date	Message
1/17/24 4:46:43 PM	Warning: Flood Certification (FC): \$7.50 exceeds baseline amount \$0.00; Fee violates TILA/R...
1/17/24 4:46:43 PM	Warning: Lender Coverage (LC): \$515.00 exceeds baseline amount \$0.00; Fee violates TILA...
1/17/24 4:46:43 PM	Warning: Title - Settlement Agent Fee (CF): \$945.00 exceeds baseline amount \$0.00; Fee viol...
1/17/24 4:46:43 PM	Warning: Processing Fee (PF): \$296.00 exceeds baseline amount \$0.00; Fee violates TILA/...
1/17/24 4:46:43 PM	Warning: Credit Report Fee (CR): \$45.50 exceeds baseline amount \$0.00; Fee violates TILA/...
1/17/24 4:46:43 PM	Warning: Appraisal Fee (AF): \$350.00 exceeds baseline amount \$0.00; Fee violates TILA/RE...
1/17/24 4:46:43 PM	Warning: Charge 'Lender Coverage' (LC); Paid By 'B', Paid To 'O' does not have a Pay To Na...
1/17/24 4:46:43 PM	Warning: Intent to Proceed may not be provided before an initial Loan Estimate.
1/17/24 4:46:43 PM	Warning: Intent to service or transfer service indicator is blank.

If there are any Fatal messages, the package cannot be processed until the errors are corrected.

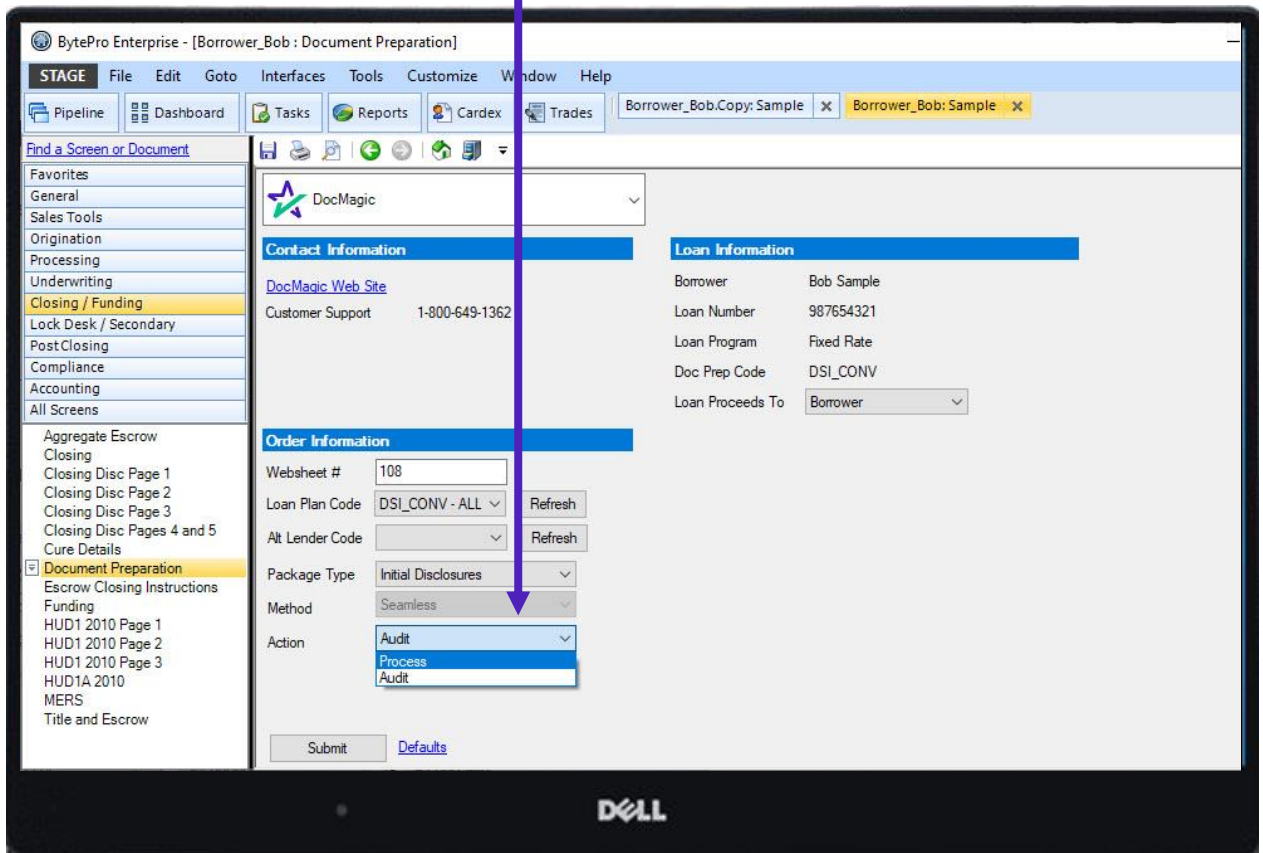




# Generate Packages From Byte

## Process

When it is time to process the package (Initial or Closing), in the Action drop down, select Process.



If there are any Fatal messages, the package cannot be processed until the errors are corrected.



# Generate Packages From Byte

Submit

In the Order Information section, set the Plan Code, Alt Lender Code, Package Type and Method as appropriate.

Optional – In the Delivery Options section, select eSign or E-mail to send the package electronically.

BytePro Enterprise - [Borrower\_Bob : Document Preparation]

STAGE File Edit Goto Interfaces Tools Customize Window Help

Pipeline Dashboard Tasks Reports Cardex Trades Borrower\_Bob.Copy: Sample Borrower\_Bob: Sample

Find a Screen or Document

Favorites

- General
- Sales Tools
- Origination
- Processing
- Underwriting
- Closing / Funding
- Lock Desk / Secondary
- Post Closing
- Compliance
- Accounting
- All Screens

Aggregate Escrow

- Closing
- Closing Disc Page 1
- Closing Disc Page 2
- Closing Disc Page 3
- Closing Disc Pages 4 and 5
- Cure Details
- Document Preparation
- Escrow Closing Instructions
- Funding
- HUD1 2010 Page 1
- HUD1 2010 Page 2
- HUD1 2010 Page 3
- HUD1A 2010
- MERS
- Title and Escrow

DocMagic

**Contact Information**

[DocMagic Web Site](#)

Customer Support 1-800-649-1362

**Loan Information**

Borrower Bob Sample

Loan Number 987654321

Loan Program Fixed Rate

Doc Prep Code DSI\_CONV

Loan Proceeds To Borrower

**Order Information**

Worksheet #

Loan Plan Code DSI\_CONV - ALL Refresh

Alt Lender Code Refresh

Package Type Initial Disclosures

Method Seamless

Action Process

**Delivery Options**

DocMagic eSign Do Not eSign

Signature Enable

Event Notification

E-Mail Secure Link to

Require Password

Retrieval Notification

DSI to Print and Deliver to Borrower

Submit

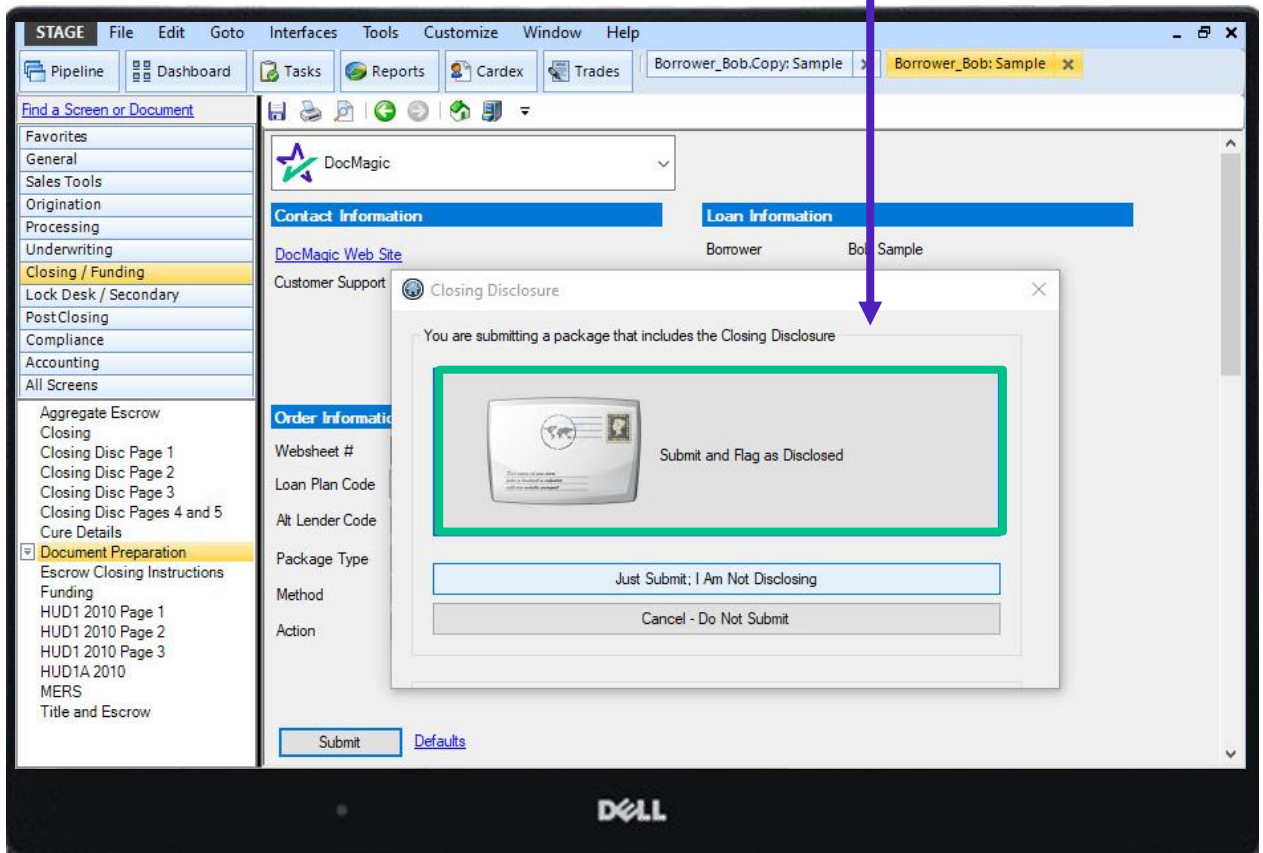
Click Submit.



# Generate Packages From Byte

Submit

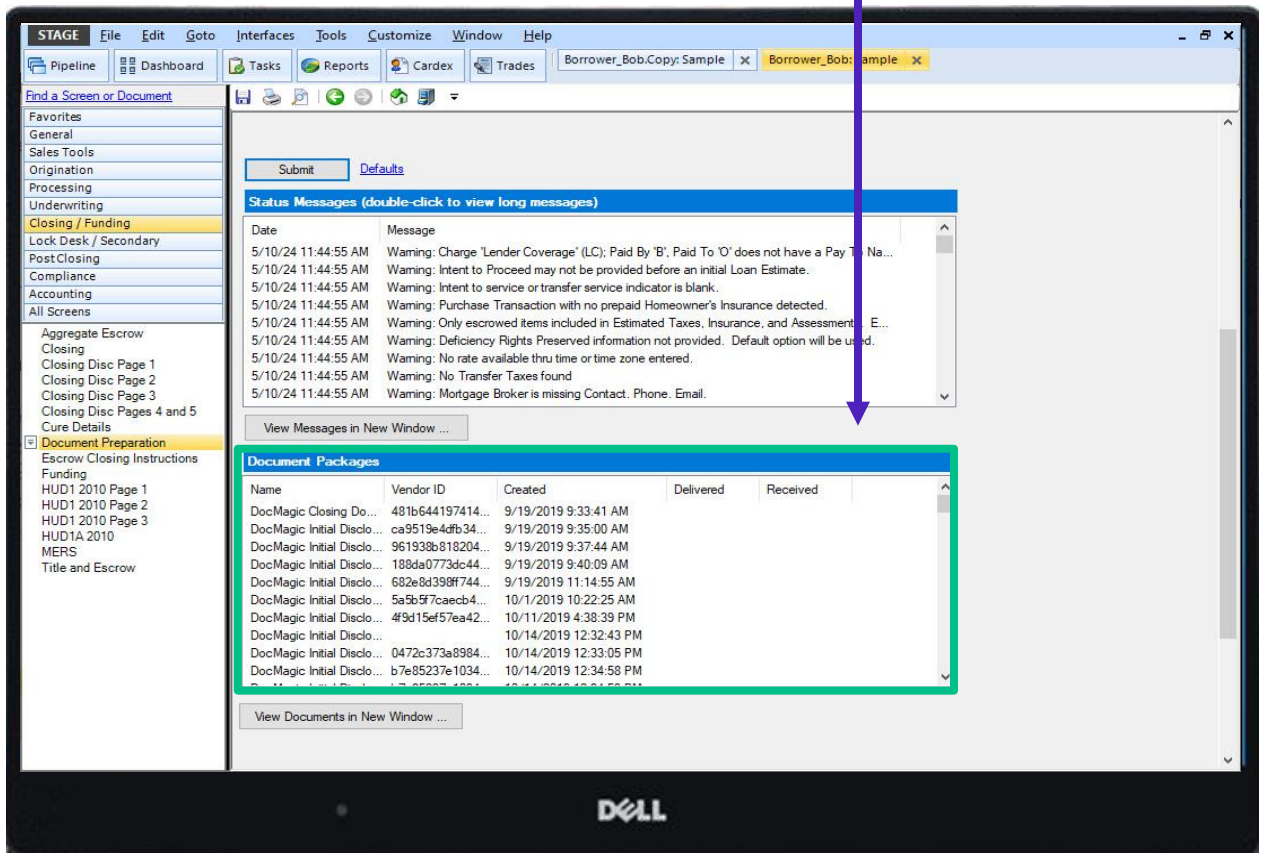
To process the package and Flag as Disclosed, select that option.



# Generate Packages From Byte

## Viewing

Processed documents will be visible in the Documents Window.



Double-click on a document to view.

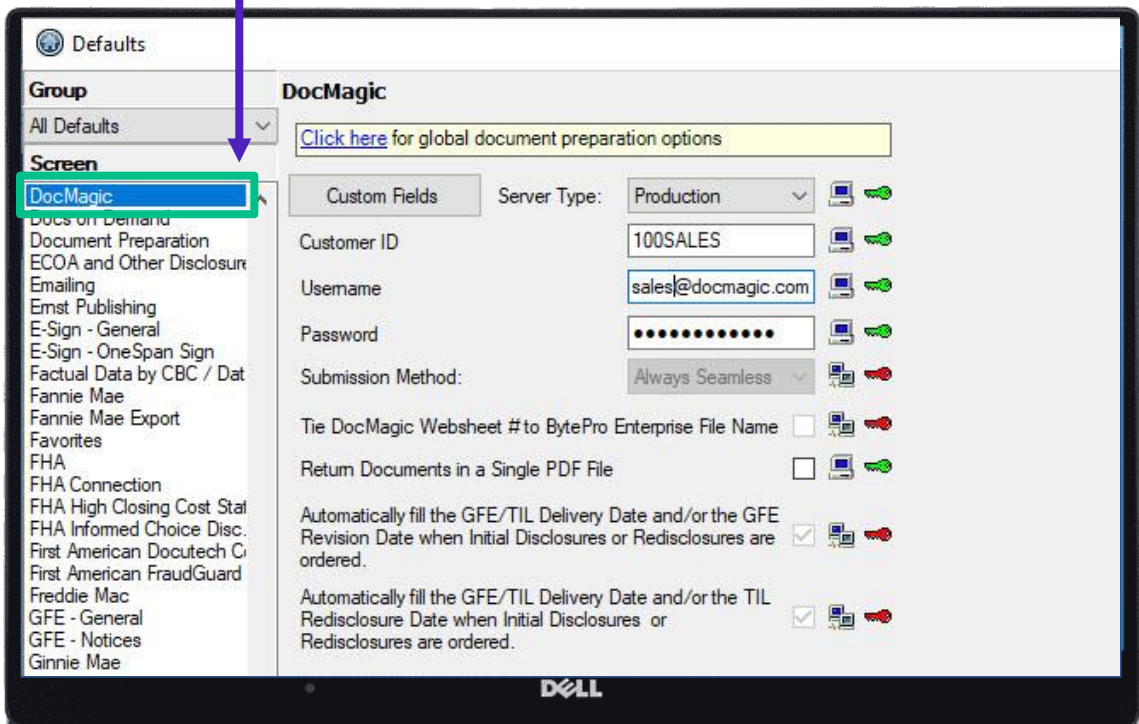


# BytePro Administration

## Defaults

The remainder of this guide focuses on the DocMagic defaults screen in BytePro.

To access the defaults screen, select Customize → Defaults → DocMagic.



# BytePro Administration

## User Credentials

Enter Customer ID, Username, and Password.

The screenshot displays the 'DocMagic' configuration page in a web application. On the left is a navigation menu with 'DocMagic' selected. The main content area is titled 'DocMagic' and contains several settings. A yellow banner at the top says 'Click here for global document preparation options'. Below this, there are tabs for 'Custom Fields' and 'Server Type: Production'. A green box highlights the 'Customer ID' field (containing '100SALES'), the 'Username' field (containing 'sales@docmagic.com'), and the 'Password' field (masked with dots). To the right of these fields are icons for each field. Below the highlighted fields, there are settings for 'Submission Method: Always Seamless', and several checkboxes for document preparation options like 'Tie DocMagic Websheet # to BytePro Enterprise File Name', 'Return Documents in a Single PDF File', and 'Automatically fill the GFE/TIL Delivery Date...'. The Dell logo is visible at the bottom of the screen.

These are the user credentials provided by DocMagic.



# BytePro Administration

## Submission Method

There are two types of submission methods:

1. Seamless – “Lights Out”
2. Browser – launches a user to the DocMagic website where they submit their documents for processing.

The screenshot shows the 'DocMagic' configuration page in the BytePro Administration interface. The left sidebar lists various screens, with 'DocMagic' selected. The main content area displays configuration options for DocMagic, including a link for global document preparation options, a 'Custom Fields' button, and several input fields: 'Server Type' (Production), 'Customer ID' (100SALES), 'Username' (sales@docmagic.com), and 'Password' (masked). The 'Submission Method' dropdown is highlighted with a red box, and a red arrow points from the text box above to it. Below the dropdown are several checkboxes for document processing options, such as 'Tie DocMagic Worksheet # to BytePro Enterprise File Name', 'Return Documents in a Single PDF File', and 'Automatically fill the GFE/TIL Delivery Date and/or the GFE Revision Date when Initial Disclosures or Redisclosures are ordered'.

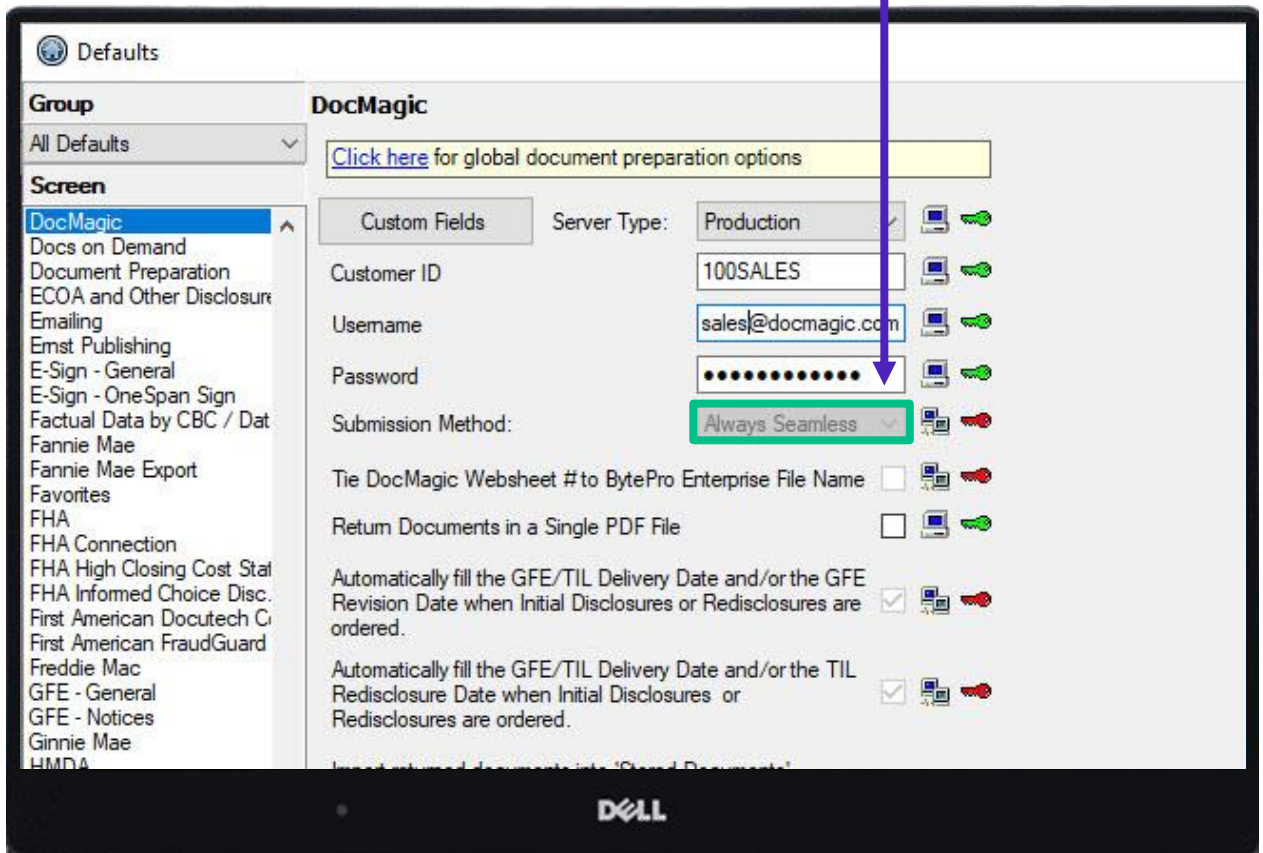


# BytePro Administration

## Submission Method

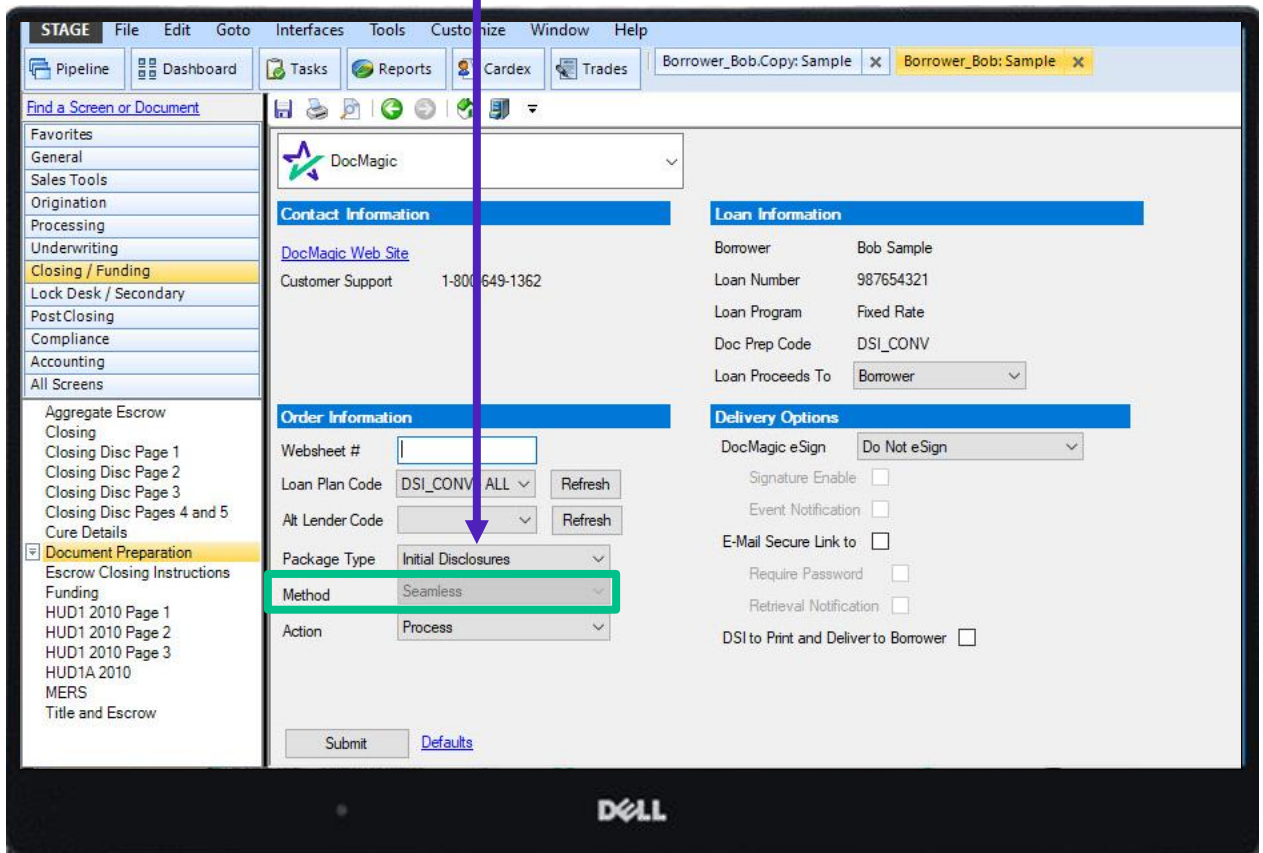
There are three types of submission method settings:

1. Always Seamless
2. Always Browser
3. Allow User to Choose





The screenshot below displays the screen that is presented to the end-user when "Seamless" is selected.



If you allow the user to choose a method, the option will be available to them at the loan level when ordering documents.



# BytePro Administration

## Tie DocMagic Worksheet Number

This setting allows the user to tie the DocMagic Worksheet number to the BytePro Enterprise File Name so that they are always the same.

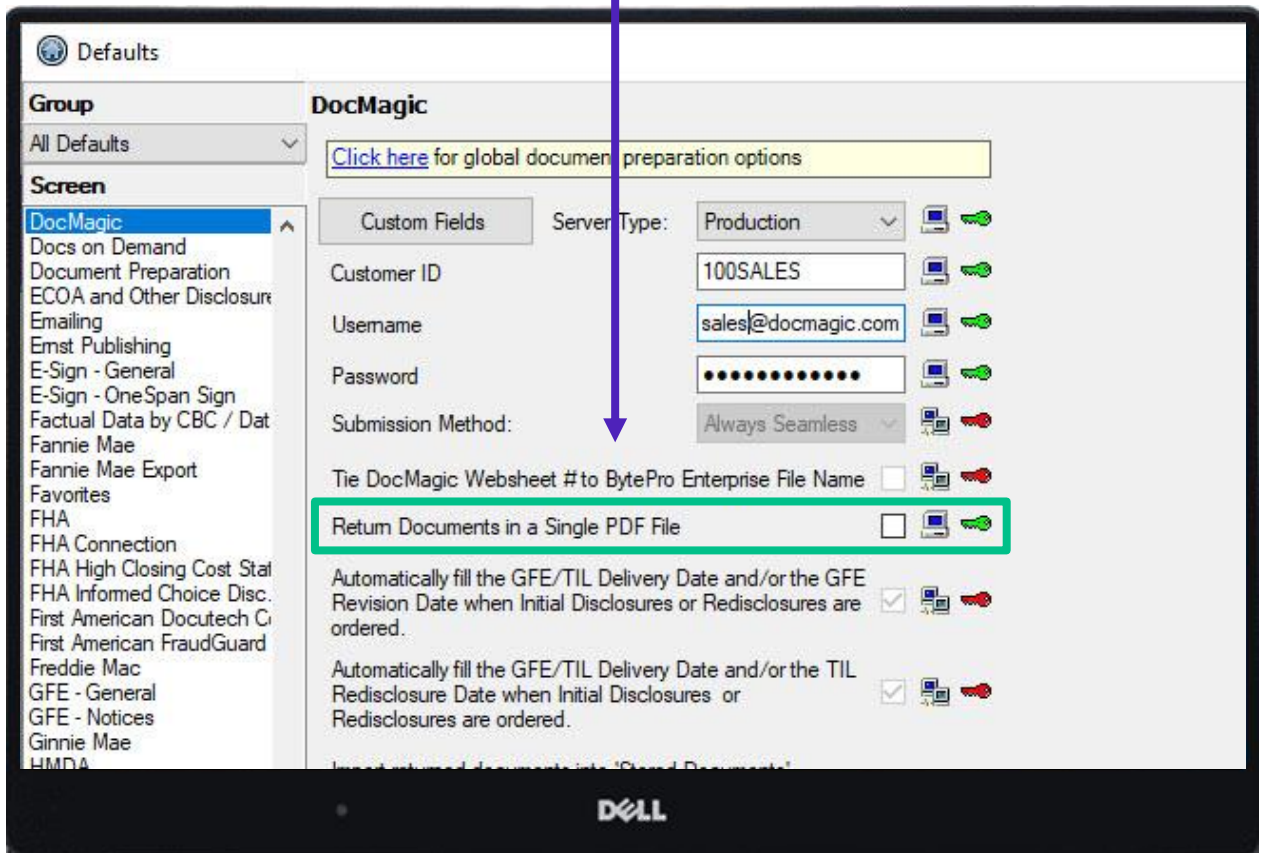
The screenshot displays the 'DocMagic' configuration page in the BytePro Administration interface. On the left, a 'Screen' menu lists various options, with 'DocMagic' selected. The main configuration area includes fields for 'Customer ID' (100SALES), 'Username' (sales@docmagic.com), and 'Password'. The 'Submission Method' is set to 'Always Seamless'. A checkbox labeled 'Tie DocMagic Worksheet # to BytePro Enterprise File Name' is highlighted with a green border. Below this, there are checkboxes for 'Return Documents in a Single PDF File' and two options for automatically filling GFE/TIL dates. A blue arrow points from the text box above to the highlighted checkbox.



# BytePro Administration

## Return Documents in a Single PDF

This option determines if the documents returned by DocMagic will be in a single PDF or split out based on document type.



If this option is not selected, DocMagic returns individual documents.



# BytePro Administration

## Auto-fill the GFE/TIL Delivery Dates

The following settings will only apply to GFE/TIL loans and will not be applicable for TRID loans.

The screenshot shows the DocMagic administration interface. On the left is a navigation tree with 'DocMagic' selected. The main area is titled 'DocMagic' and contains various settings. A yellow box highlights a link: 'Click here for global document preparation options'. Below this are several settings, including 'Server Type' (Production), 'Customer ID' (100SALES), 'Username' (sales@docmagic.com), 'Password' (masked), and 'Submission Method' (Always Seamless). A green box highlights two specific settings: 'Automatically fill the GFE/TIL Delivery Date and/or the GFE Revision Date when Initial Disclosures or Redisclosures are ordered.' and 'Automatically fill the GFE/TIL Delivery Date and/or the TIL Redisclosure Date when Initial Disclosures or Redisclosures are ordered.' Both are checked. A blue arrow points from the text box above to the green box.

These settings will automatically fill either the GFE Revision Date or TIL Redisclosure Date when selected.



# BytePro Administration

## Import Document Settings

These settings allow the ability to select which document package types will be automatically stored in Stored documents.

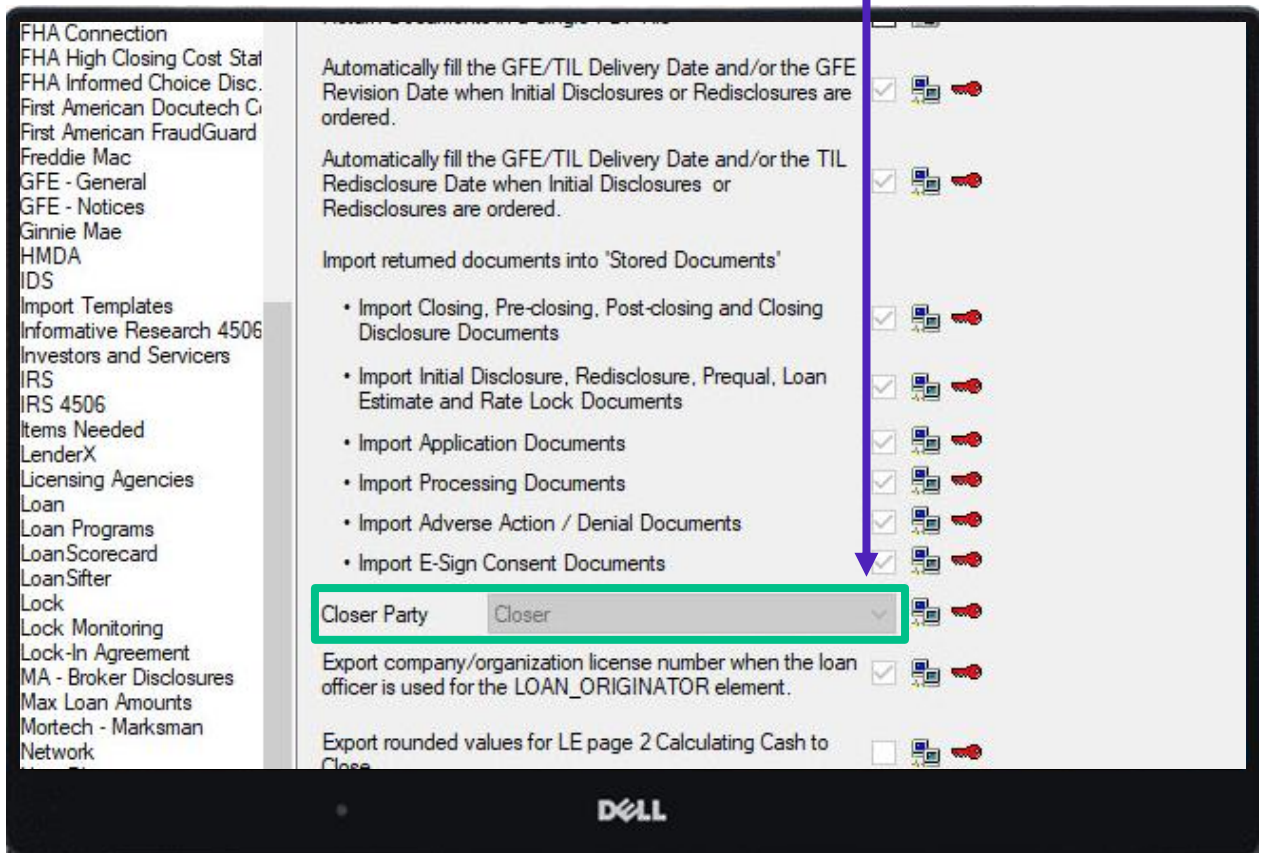
The screenshot displays the 'Import Document Settings' configuration page. On the left is a navigation menu with items such as 'FHA Connection', 'GFE - General', 'Import Templates', and 'Loan'. The main content area is titled 'Import Document Settings' and includes several sections:

- Two sections for automatically filling GFE/TIL dates, each with a checked checkbox and a key icon.
- A section titled 'Import returned documents into "Stored Documents"' which is highlighted with a green box. It contains six items, each with a checked checkbox and a key icon:
  - Import Closing, Pre-closing, Post-closing and Closing Disclosure Documents
  - Import Initial Disclosure, Redislosure, Prequal, Loan Estimate and Rate Lock Documents
  - Import Application Documents
  - Import Processing Documents
  - Import Adverse Action / Denial Documents
  - Import E-Sign Consent Documents
- A 'Closer Party' dropdown menu set to 'Closer'.
- Two sections for exporting license numbers and rounded values, each with a checked checkbox and a key icon.

The six options correspond with the Package Type selected at the loan level for processing.



This setting will determine which party in BytePro is considered the "Closer Party" in DocMagic.



By selecting a party from the drop down, BytePro will send that information to DocMagic to be listed as the Closer Party documents.



# BytePro Administration

## Company/Organization License Number

This setting allows a “retail” organization to transmit their company license information for certain state disclosures.

The screenshot displays the BytePro Administration interface. On the left is a navigation menu with items such as HMDA, IDS, Import Templates, Informative Research 4506, Investors and Servicers, IRS, IRS 4506, Items Needed, LenderX, Licensing Agencies, Loan, Loan Programs, LoanScorecard, LoanSifter, Lock, Lock Monitoring, Lock-In Agreement, MA - Broker Disclosures, Max Loan Amounts, Mortech - Marksman Network, New File, NMLS Call Report, NY - Pre-Application Disclosure, Optimal Blue, Partners Credit, PPDocs, Inc. by PeirsonPa, Prepays, Prepayment Penalty, and Prequalification Letter. The main content area is titled 'Import returned documents into "Stored Documents"' and contains a list of document types with checkboxes and icons. A blue arrow points from the text box above to the checkbox for 'Export company/organization license number when the loan officer is used for the LOAN\_ORIGINATOR element', which is checked. Other settings include 'Closer Party' (set to 'Closer'), 'Export rounded values for LE page 2 Calculating Cash to Close.' (unchecked), 'Export IRRRL Worksheet Line 1 as the existing loan balance for VA Interest Rate Reduction loans.' (unchecked), 'URL Override' (https://stage-www.docmagic.com/webservi), and 'Message Import Option' (All Except Info).

Checking this setting allows the company license entered on the loan officer party to be exported for retail organization types.



# BytePro Administration

## Loan Program

An administrator can select which DocMagic Loan Plan Code will be defaulted into the loan based on the loan program selected at the loan level.

The screenshot displays the DocMagic software interface. On the left, there are sections for 'Contact Information' (DocMagic Web Site, Customer Support 1-800-649-1362) and 'Order Information' (Worksheet # 138, Loan Plan Code DSI\_CONV - ALL, Alt Lender Code, Package Type Closing Documents, Method Seamless, Action Process). The main area is titled 'Defaults' and contains a 'Loan Programs' menu. A blue arrow points from the 'Loan Programs' menu item in the sidebar to the 'Edit Loan Program' form on the right. The 'Edit Loan Program' form includes fields for 'Loan Program Code' (FixedRate), 'Loan Program Name' (Conventional), 'Mortgage Type' (Conventional), 'Note Rate' (4.000%), 'Qual Rate' (4.000%), 'Term' (360), 'Interest Only Period' (months), and 'Doc Prep Code' (DSI\_CONV).

Go to Defaults → Loan Programs.  
Select a loan program to bring up  
the Edit Loan Program menu.





# BytePro Administration

## Loan Program

The selected BytePro loan program may contain an associated 'Doc Prep Code'.

The screenshot displays the DocMagic Loan Programs administration interface. On the left, there are sections for 'Contact Information' (DocMagic Web Site, Customer Support 1-800-649-1362) and 'Order Information' (Worksheet # 138, Loan Plan Code DSI\_CONV - ALL, Package Type Closing Documents, Method Seamless, Action Process). A 'Submit' button and a 'Defaults' link are at the bottom left. The central 'Defaults' pane lists various document types, with 'Loan Programs' selected. The right pane shows the 'Loan Programs' table with one entry: 'FixedRate' (Conventional, Conventional). Below the table is the 'Edit Loan Program' form. The 'Doc Prep Code' field at the bottom of the form is highlighted in yellow and contains the value 'DSI\_CONV'. A blue arrow points from the text box above to this field.

You may enter the DocMagic Loan Plan Code in this Doc Prep Code field.



If the loan program contains a doc prep code that matches a DocMagic loan plan code, then that matching loan plan code will be automatically selected for the current loan submission.

The screenshot displays the DocMagic administration interface. On the left, there are sections for 'Contact Information' (DocMagic Web Site, Customer Support 1-800-649-1362) and 'Order Information' (Worksheet # 138, Loan Plan Code DSI\_CONV - ALL, Package Type Closing Documents, Method Seamless, Action Process). A 'Submit' button and a 'Defaults' link are at the bottom left. The central 'Defaults' pane shows a tree view of categories like 'Screen', 'Loan Programs', 'Lock', and 'Mortgage X Sites'. The 'Loan Programs' section is expanded, showing a table with columns 'Code', 'Name', and 'Mortgage Type'. The 'FixedRate' program is selected, and the 'Edit Loan Program' form is open. The form includes fields for 'Loan Program Code' (FixedRate), 'Loan Program Name' (Conventional), 'Mortgage Type' (Conventional), 'Note Rate' (4.000%), 'Qual Rate' (4.000%), 'Term' (360), and 'Doc Prep Code' (DSI\_CONV, highlighted in yellow). A 'Dell' logo is visible at the bottom center of the screen.



# BytePro Administration

## Loan Program

You may select the Loan Plan Code under Order Information.

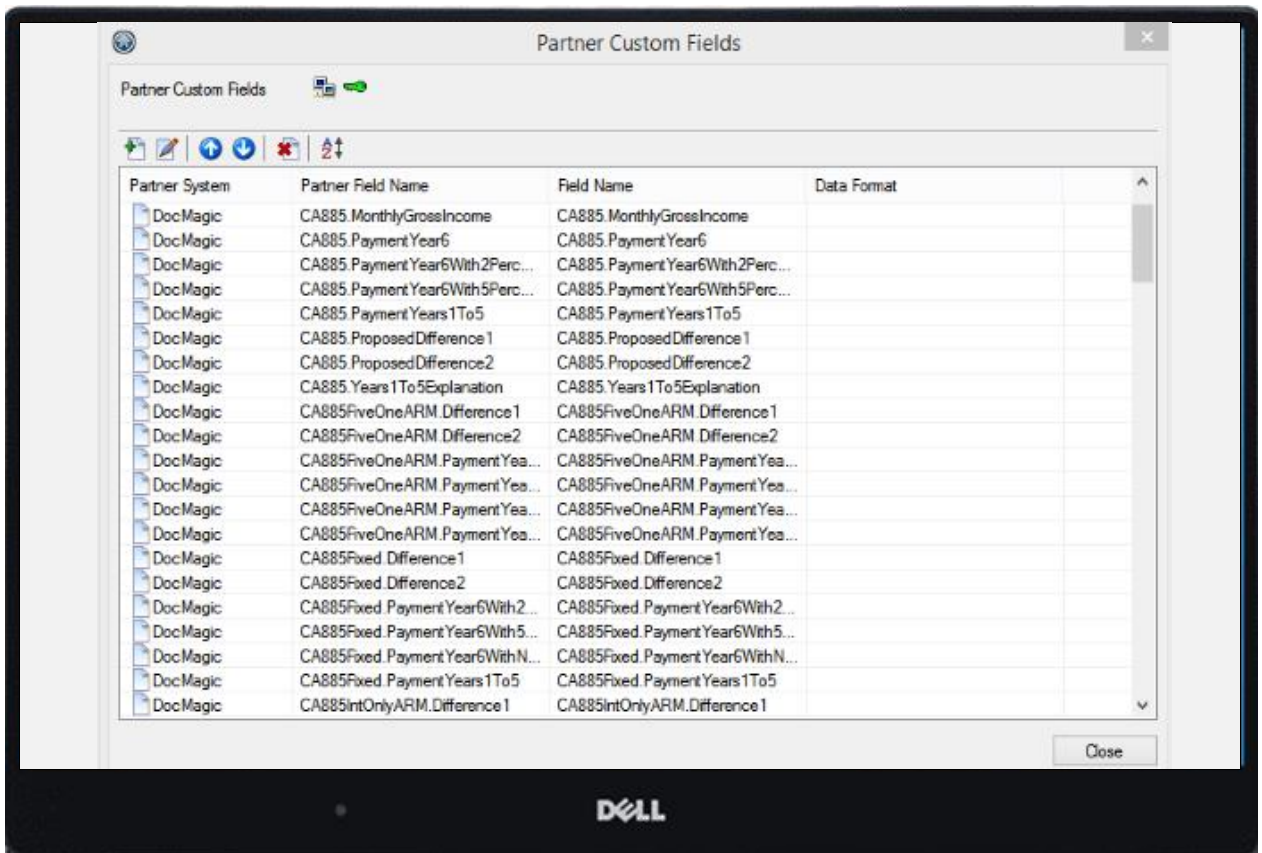
The screenshot shows a web application interface for DocMagic. The interface is divided into several sections:

- Contact Information:** Includes a link to the DocMagic Web Site and Customer Support information (1-800-649-1362).
- Loan Information:** Displays details for a borrower (Bob Sample), loan number (987654321), loan program (Fixed Rate), loan prep code (DSI\_CONV), and loan proceeds to (Borrower).
- Order Information:** Contains fields for Worksheet #, Loan Plan Code (DSI\_CONV - ALL), Alt Lender Code, Package Type (Initial Disclosures), Method (Seamless), and Action (Process). Each field has a Refresh button.
- Delivery Options:** Includes DocMagic eSign (Do Not eSign), Signature Enable, Event Notification, E-Mail Secure Link to, Require Password, Retrieval Notification, and DSI to Print and Deliver to Borrower.

At the bottom of the interface, there are Submit and Defaults buttons.



Utilize this screen to match custom fields to fields in DocMagic.



# BytePro Administration

## Document Preparation Defaults

Go to Defaults →  
Document Preparation to  
set the Closing Instructions.

The screenshot displays the 'Defaults' window in the BytePro Administration system. The left sidebar shows a list of default groups, with 'Document Preparation' highlighted. The main content area is titled 'Document Preparation' and contains several settings:

- Closing Instructions Option:** Set to 'PTF Conditions (not cleared and not inter)'.
- Lender Contact - Retail Loans:** Set to 'Loan Officer'.
- Lender Contact - Brokered-Out Loans:** (Empty dropdown).
- Lender Contact - Wholesale Loans:** Set to 'Broker'.
- Lender Contact - Correspondent Loans:** Set to 'Loan Officer'.
- Lender Contact - Mini-Corr Loans:** (Empty dropdown).
- Transmit Alias Type:** Set to 'Credit Alias and AKA, Credit Alias Only, or AKA Only'.
- TRID Loans:** Set to 'Transmit Disclosed Fees on Loan Estimate'.

Conditions can be pulled from  
Escrow Instructions, Conditions,  
or a Management Report.



# BytePro Administration

## Document Preparation Defaults

On this screen, you may also set the following options to be transmitted for document preparation: Lender Contact by Origination Channel, Alias Type and the option to Transmit Disclosed Fees on Loan Estimate.

**Defaults**

**Group**  
All Defaults

**Screen**  
DocMagic  
Docs on Demand  
Document Preparation  
DocuTech ConformX  
ECOA and Other Disclosures  
Emailing  
E-Sign  
Fair Lending / Fair Credit  
Fannie Mae  
Fannie Mae Export  
Favorites  
FHA  
FHA Connection  
FHA High Closing Cost Stat  
FHA Informed Choice Disc.  
Freddie Mac  
GFE - General  
GFE - Notices

**Document Preparation**

Closing Instructions Option: PTF Conditions (not cleared and not inter)

Lender Contact - Retail Loans: Loan Officer

Lender Contact - Brokered-Out Loans: [Empty]

Lender Contact - Wholesale Loans: Broker

Lender Contact - Correspondent Loans: Loan Officer

Lender Contact - Mini-Corr Loans: [Empty]

Transmit Alias Type: Credit Alias and AKA, Credit Alias Only, or AKA Only

TRID Loans: Transmit Disclosed Fees on Loan Estimate

