

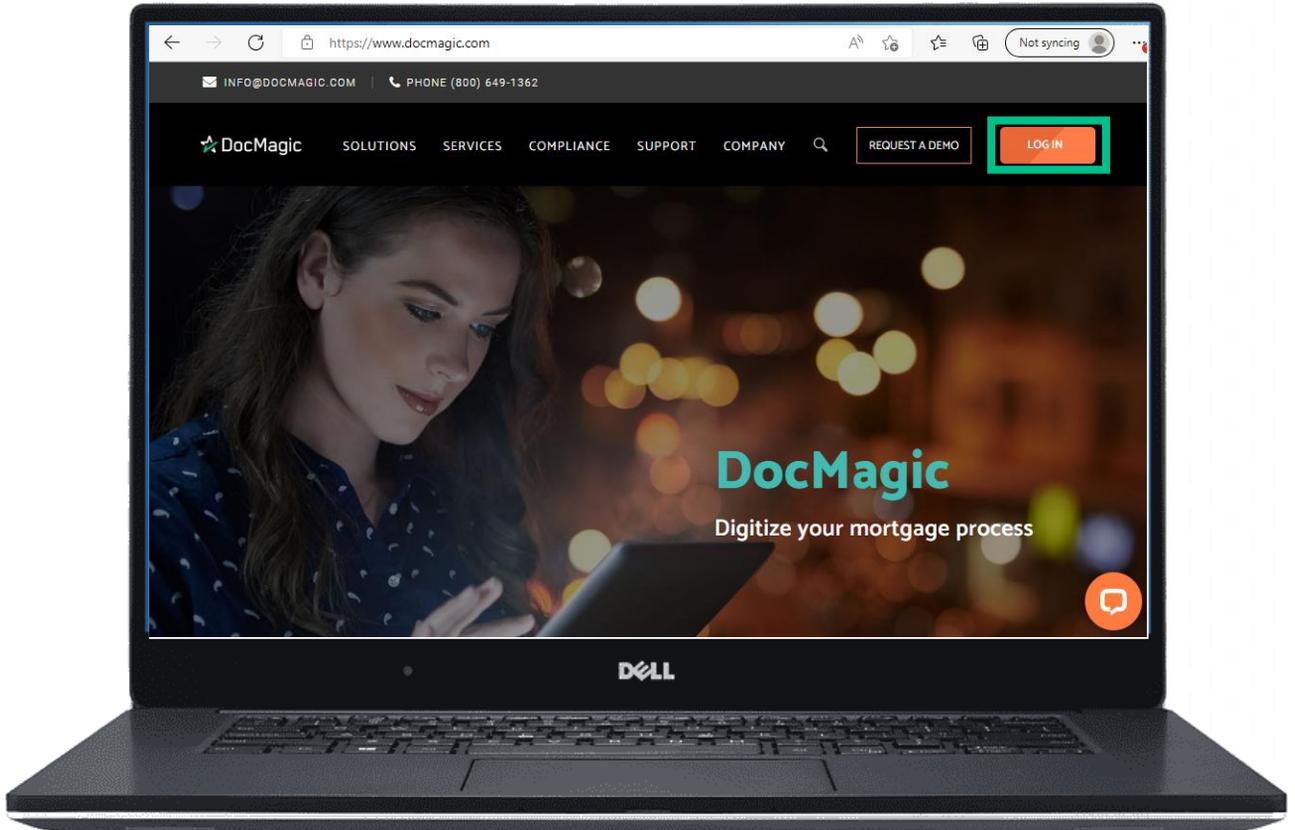


Document Files

# Document Files

## Navigating to Document Files

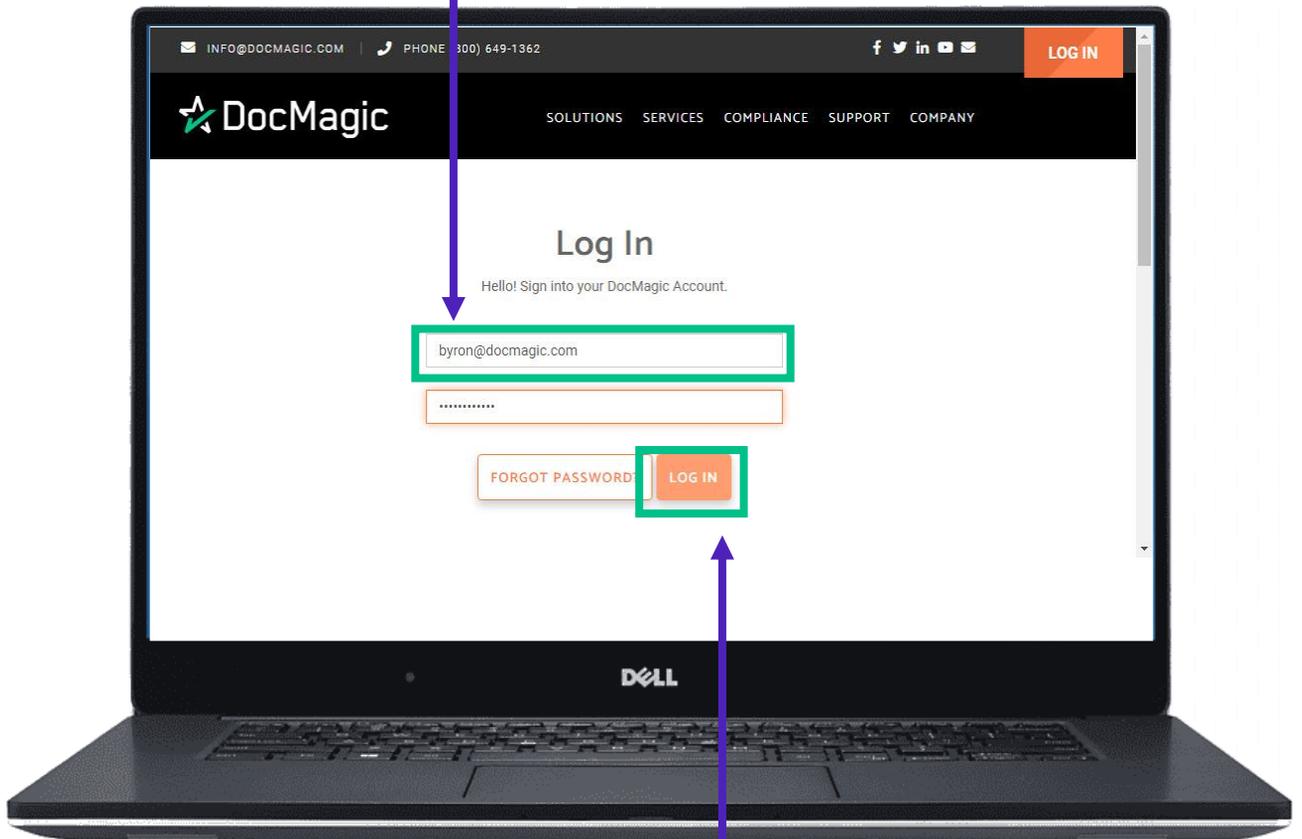
Go to [www.docmagic.com](https://www.docmagic.com)



# Document Files

## Navigating to Document Files

Login with your  
email and  
password.



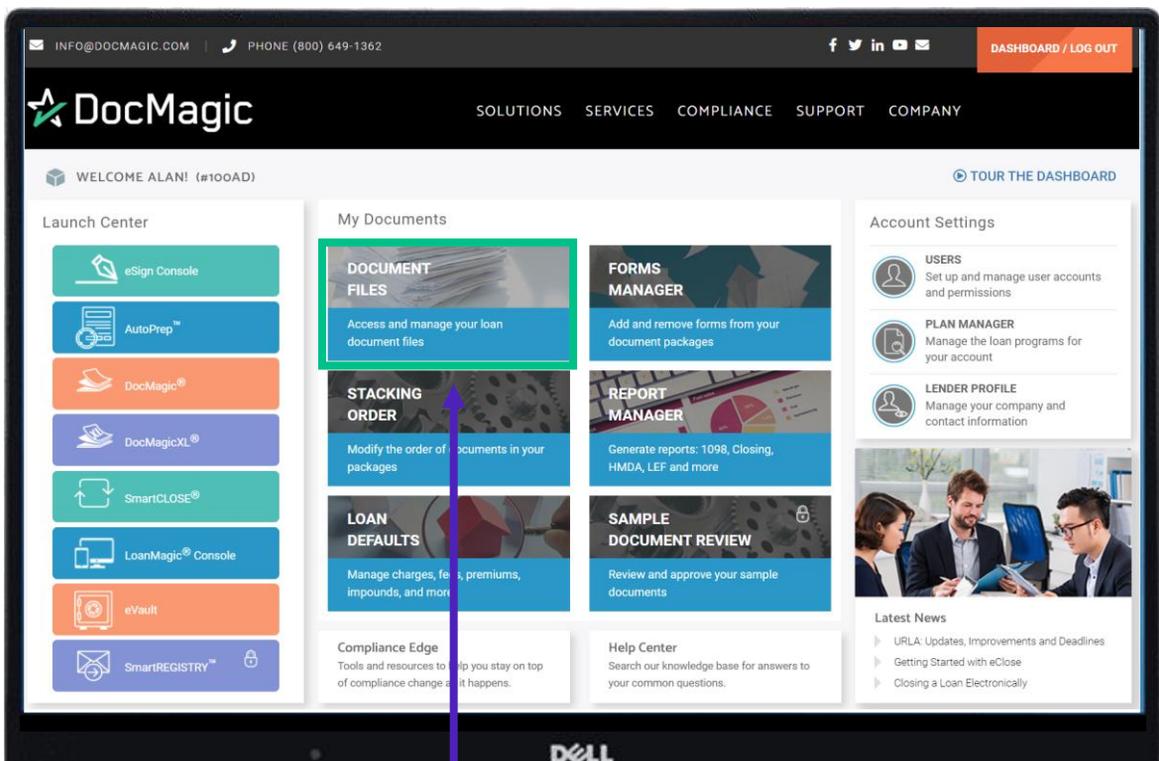
Click "LOG IN"



# Document Files

## Dashboard

From the Documents page, you can review the list of documents packages that were processed within the last 6 months as well as create and deliver the Uniform Closing Dataset (UCD) XML to Fannie Mae or Freddie Mac.



Click Document Files from the Dashboard to get started.



# Document Files

Locked Out

If a lock appears on the selection, you can't access the page and will have to speak with your DocMagic Administrator.

The screenshot displays the DocMagic dashboard interface. At the top, there is a navigation bar with contact information (INFO@DOCMAGIC.COM, PHONE (800) 649-1362), social media icons, and a 'DASHBOARD / LOG OUT' button. The main header includes the DocMagic logo and a menu with 'SOLUTIONS', 'SERVICES', 'COMPLIANCE', 'SUPPORT', and 'COMPANY'. Below the header, the dashboard is personalized for 'STEVE! (#100ST)' and includes a 'TOUR THE DASHBOARD' link. The 'My Documents' section is highlighted with a blue border and contains several tiles: 'DOCUMENT FILES' (with a lock icon), 'FORMS MANAGER', 'STACKING ORDER', 'REPORT MANAGER', 'LOAN DEFAULTS', and 'SAMPLE DOCUMENT REVIEW'. A blue arrow points from the text box above to the lock icon on the 'DOCUMENT FILES' tile. Other sections include 'Launch Center' with various tool icons, 'Account Settings' with 'USERS', 'PLAN MANAGER', and 'LENDER PROFILE' options, and 'Latest News' with three news items.



# Document Files

Search

At the top of the page, you'll be able to search by DocMagic's worksheet (worksheet) number, a date range, and specific document sets.

The screenshot displays the DocMagic Search interface. At the top, there is a navigation bar with the DocMagic logo, contact information (INFO@DOCMAGIC.COM, PHONE (800) 649-1362), social media icons, and a DASHBOARD / LOG OUT button. Below the navigation bar, the page title "Search" is displayed. The search area includes four input fields: "Worksheet:", "Start Date:" (with a placeholder "MM-DD-YYYY"), "Document Set:", and "End Date:". Below these fields are "CLEAR" and "SUBMIT" buttons. A dropdown menu for "Document Set:" is open, showing a list of document types: Enote, Closing, LoanApproval, LoanEstimate, Underwriting, PointOfSale, Predisclosure, EConsent, Preclosing, FloodCertification, Prequalification, Redisclosure, ComplianceReview, ServicingTransfer, RateLock, PostClosing, Adverse, FormList, and ClosingDisclosure. Below the search area, the "Document Files" section is visible, showing a table with columns: WORKSHEET #, LOAN #, BORROWER, MODIFIED, and TYPE. The table currently shows no results, with a note "(since Wednesday, September 29, 2021)".

The Document Set drop down allows you to filter your search.



# Document Files

Search

The "Show" drop down will let you see up to 100 files per page.

DocMagic

SOLUTIONS SERVICES COMPLIANCE SUPPORT COMPANY DASHBOARD

Document Files  
(since Wednesday, September 29, 2021)

Show 10 entries

Search:

WORKSHEET #	LOAN #	BORROWER	MODIFIED	TYPE	ACTION
1	100420210001	NED NEEDS NOTARY SAMPLE	03-18-2022 4:13:56 PM	IntegratedDisclosure (Selected)	  
1	100420210001	NED NEEDS NOTARY SAMPLE	03-17-2022 2:20:38 PM	IntegratedDisclosure (Selected)	  
10	202110010002	BILLY BORROWER SAMPLE	10-01-2021 3:51:18 PM	Closing	  
11	202110010003	BILLY BORROWER SAMPLE	10-01-2021 3:52:05 PM	Closing	  
12	202110010004	BILLY BORROWER SAMPLE	10-01-2021 3:55:30 PM	Closing	  
13	202110010005	BILLY BORROWER SAMPLE	11-11-2021 2:34:53 PM	Closing	  

You will be able to view the last 6 months of processed loans.



# Document Files

Search

Search using borrower name, loan #, worksheet #, package type or date.

DocMagic

SOLUTIONS SERVICES COMPLIANCE SUPPORT COMPANY DASHBOARD

Document Files  
(since Wednesday, September 29, 2021)

Show 10 entries

Search:

WORKSHEET #	LOAN #	BORROWER	MODIFIED	TYPE	ACTION
1	100420210001	NED NEEDS NOTARY SAMPLE	03-18-2022 4:13:56 PM	IntegratedDisclosure (Selected)	
1	100420210001	NED NEEDS NOTARY SAMPLE	03-17-2022 2:20:38 PM	IntegratedDisclosure (Selected)	
10	202110010002	BILLY BORROWER SAMPLE	10-01-2021 3:51:18 PM	Closing	
11	202110010003	BILLY BORROWER SAMPLE	10-01-2021 3:52:05 PM	Closing	
12	202110010004	BILLY BORROWER SAMPLE	10-01-2021 3:55:30 PM	Closing	
13	202110010005	BILLY BORROWER SAMPLE	11-11-2021 2:34:53 PM	Closing	

DELL

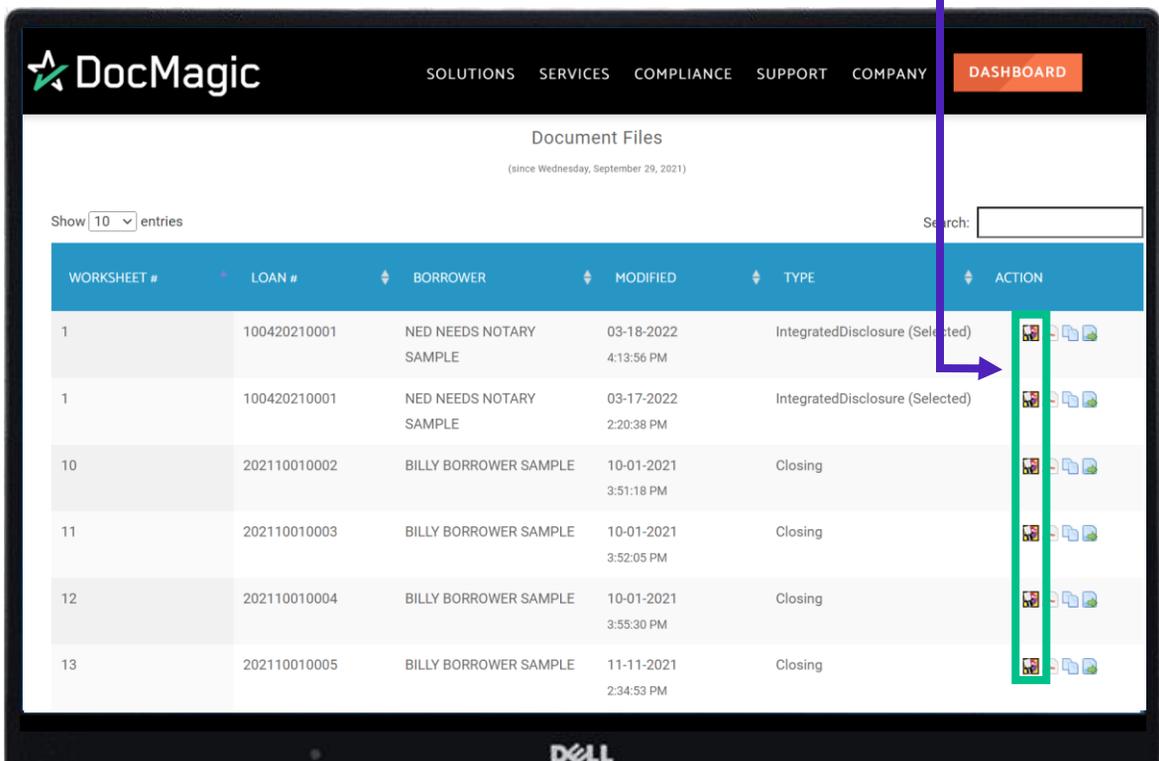
You can sort the files by clicking the arrows to the left of the headings in the blue shaded area below.



# Document Files

## Action Buttons

The DocMaster button allows you to review documents, send them as e-disclosures, and as secure email closing documents.



The screenshot displays the DocMagic web interface. At the top, there is a navigation bar with the DocMagic logo and menu items: SOLUTIONS, SERVICES, COMPLIANCE, SUPPORT, COMPANY, and a DASHBOARD button. Below the navigation bar, the page title is "Document Files" with a subtitle "(since Wednesday, September 29, 2021)". A search bar is located on the right side. The main content area features a table with the following columns: WORKSHEET #, LOAN #, BORROWER, MODIFIED, TYPE, and ACTION. The table contains seven rows of data. The ACTION column for each row contains three icons: a person icon (DocMaster), a document icon, and a mail icon. A green box highlights the ACTION column, and a blue arrow points from the text box above to the DocMaster icon in the first row.

WORKSHEET #	LOAN #	BORROWER	MODIFIED	TYPE	ACTION
1	100420210001	NED NEEDS NOTARY SAMPLE	03-18-2022 4:13:56 PM	IntegratedDisclosure (Selected)	[DocMaster] [Document] [Mail]
1	100420210001	NED NEEDS NOTARY SAMPLE	03-17-2022 2:20:38 PM	IntegratedDisclosure (Selected)	[DocMaster] [Document] [Mail]
10	202110010002	BILLY BORROWER SAMPLE	10-01-2021 3:51:18 PM	Closing	[DocMaster] [Document] [Mail]
11	202110010003	BILLY BORROWER SAMPLE	10-01-2021 3:52:05 PM	Closing	[DocMaster] [Document] [Mail]
12	202110010004	BILLY BORROWER SAMPLE	10-01-2021 3:55:30 PM	Closing	[DocMaster] [Document] [Mail]
13	202110010005	BILLY BORROWER SAMPLE	11-11-2021 2:34:53 PM	Closing	[DocMaster] [Document] [Mail]

You will need to have the DocMaster software installed on your computer. Please see the DocMaster guide on our Product Training Page for details.



# Document Files

## Action Buttons

You can download review documents without DocMaster by clicking the PDF icon.

The screenshot displays the DocMagic interface. At the top, there is a navigation bar with the DocMagic logo and menu items: SOLUTIONS, SERVICES, COMPLIANCE, SUPPORT, COMPANY, and a DASHBOARD button. Below the navigation bar, the page title is "Document Files" with a subtitle "(since Wednesday, September 29, 2021)".

On the left, there is a "Show 10 entries" dropdown menu and a search box on the right. The main content is a table with the following columns: WORKSHEET #, LOAN #, BORROWER, MODIFIED, TYPE, and ACTION.

WORKSHEET #	LOAN #	BORROWER	MODIFIED	TYPE	ACTION
1	100420210001	NED NEEDS NOTARY SAMPLE	03-18-2022 4:13:56 PM	IntegratedDisclosure (Selected)	[Icons: Print, PDF, Download]
1	100420210001	NED NEEDS NOTARY SAMPLE	03-17-2022 2:20:38 PM	IntegratedDisclosure (Selected)	[Icons: Print, PDF, Download]
10	202110010002	BILLY BORROWER SAMPLE	10-01-2021 3:51:18 PM	Closing	[Icons: Print, PDF, Download]
11	202110010003	BILLY BORROWER SAMPLE	10-01-2021 3:52:05 PM	Closing	[Icons: Print, PDF, Download]
12	202110010004	BILLY BORROWER SAMPLE	10-01-2021 3:55:30 PM	Closing	[Icons: Print, PDF, Download]
13	202110010005	BILLY BORROWER SAMPLE	11-11-2021 2:34:53 PM	Closing	[Icons: Print, PDF, Download]

A green box highlights the PDF icon in the ACTION column of the first row. A purple arrow points from the text box above to this icon. The Dell logo is visible at the bottom of the monitor frame.



# Document Files

## Action Buttons

This Copy Webdocs Code to Clipboard button will allow you to paste the Webdocs code in the DocMaster software or somewhere else if needed.

The screenshot displays the DocMagic web interface. At the top, there is a navigation bar with the DocMagic logo and menu items: SOLUTIONS, SERVICES, COMPLIANCE, SUPPORT, COMPANY, and a DASHBOARD button. Below the navigation bar, the page title is "Document Files" with a subtitle "(since Wednesday, September 29, 2021)".

The main content area features a table with the following columns: WORKSHEET #, LOAN #, BORROWER, MODIFIED, TYPE, and ACTION. The table contains six rows of data. The first two rows are highlighted in blue, indicating they are selected. The ACTION column for each row contains three icons: a document icon, a copy icon, and a delete icon. A green box highlights the copy icons for the first three rows, and a purple arrow points from the text box above to the copy icon of the first row.

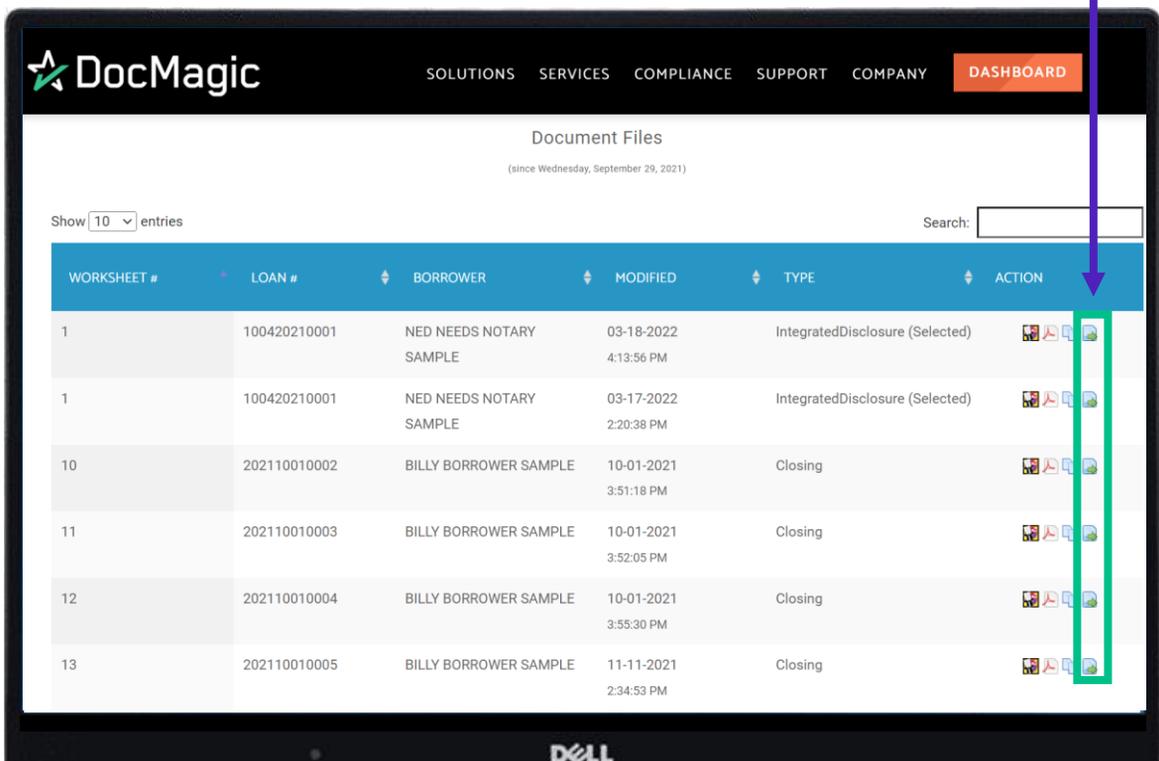
WORKSHEET #	LOAN #	BORROWER	MODIFIED	TYPE	ACTION
1	100420210001	NED NEEDS NOTARY SAMPLE	03-18-2022 4:13:56 PM	IntegratedDisclosure (Selected)	[Icons]
1	100420210001	NED NEEDS NOTARY SAMPLE	03-17-2022 2:20:38 PM	IntegratedDisclosure (Selected)	[Icons]
10	202110010002	BILLY BORROWER SAMPLE	10-01-2021 3:51:18 PM	Closing	[Icons]
11	202110010003	BILLY BORROWER SAMPLE	10-01-2021 3:52:05 PM	Closing	[Icons]
12	202110010004	BILLY BORROWER SAMPLE	10-01-2021 3:55:30 PM	Closing	[Icons]
13	202110010005	BILLY BORROWER SAMPLE	11-11-2021 2:34:53 PM	Closing	[Icons]



# Document Files

## Action Buttons

The open green arrow indicates that the file contains a Closing Disclosure that can generate and deliver the UCD XML to a GSE (Fannie Mae/Freddie Mac).



DocMagic

SOLUTIONS SERVICES COMPLIANCE SUPPORT COMPANY DASHBOARD

Document Files  
(since Wednesday, September 29, 2021)

Show 10 entries Search:

WORKSHEET #	LOAN #	BORROWER	MODIFIED	TYPE	ACTION
1	100420210001	NED NEEDS NOTARY SAMPLE	03-18-2022 4:13:56 PM	IntegratedDisclosure (Selected)	
1	100420210001	NED NEEDS NOTARY SAMPLE	03-17-2022 2:20:38 PM	IntegratedDisclosure (Selected)	
10	202110010002	BILLY BORROWER SAMPLE	10-01-2021 3:51:18 PM	Closing	
11	202110010003	BILLY BORROWER SAMPLE	10-01-2021 3:52:05 PM	Closing	
12	202110010004	BILLY BORROWER SAMPLE	10-01-2021 3:55:30 PM	Closing	
13	202110010005	BILLY BORROWER SAMPLE	11-11-2021 2:34:53 PM	Closing	

Packages that do not contain a Closing Disclosure will be greyed out – ensure that the icon is colored before trying to send a report to a GSE.



# Document Files

## Sending a UCD Report

Select "Submit to Third Party" and choose your GSE from the drop down below.

The screenshot shows the DocMagic 'Document Files' interface. At the top, there is a navigation bar with 'SOLUTIONS', 'SERVICES', 'COMPLIANCE', 'SUPPORT', 'COMPANY', and a 'DASHBOARD' button. Below this, the page title is 'Document Files' with a subtitle '(since Wednesday, September 29, 2021)'. There is a search bar and a 'Show 10 entries' dropdown. The main content is a table with columns 'WORKSHEET #', 'LOAN #', and 'ACTION'. An 'Export Utility' modal is open over the table, showing 'Export Type' set to 'Uniform Closing Dataset (UCD)'. The 'Submit to Third Party' option is selected, and a dropdown menu for 'System Name' is open, listing 'Select Third Party', 'Fannie Mae', and 'Freddie Mac Loan Closing Advisor'. A blue arrow points from the instruction text to the 'Submit to Third Party' option.

WORKSHEET #	LOAN #	ACTION
1	1004202	Uniform Closing Dataset (UCD) (Selected)
1	1004202	Save as... (Selected)
10	202110	Submit to Third Party (Selected)
11	202110	Uniform Closing Dataset (UCD) (Selected)
12	202110	Uniform Closing Dataset (UCD) (Selected)
13	202110010005	BILLY BORROWER SAMPLE 11-11-2021 Closing



# Document Files

## Sending a UCD Report

Login with the credentials used to access your GSE's website and click "OK" at the bottom of the window.

The screenshot shows the DocMagic interface with the 'Export Utility' window open. The window title is 'Document Files' and it shows a table of worksheets. The 'Export Type' is set to 'Uniform Closing Dataset (UCD)'. The 'Submit to Third Party' form is filled out with the following information:

WORKSHEET #	LOAN	Export Type	Export Utility
1	10042	Save as...	Uniform Closing Dataset (UCD)
1	10042	Submit to Third Party	Uniform Closing Dataset (UCD)
10	20211		
11	20211		
12	20211		
13	202110010005	BILLY BORROWER SAMPLE	11-11-2021 Closing

The 'Submit to Third Party' form fields are:

- System Name: Fannie Mae
- User Name: aland@docmagic.com
- Password: [Redacted]

The 'OK' button is highlighted with a green box, and a purple arrow points from the text box above to it.

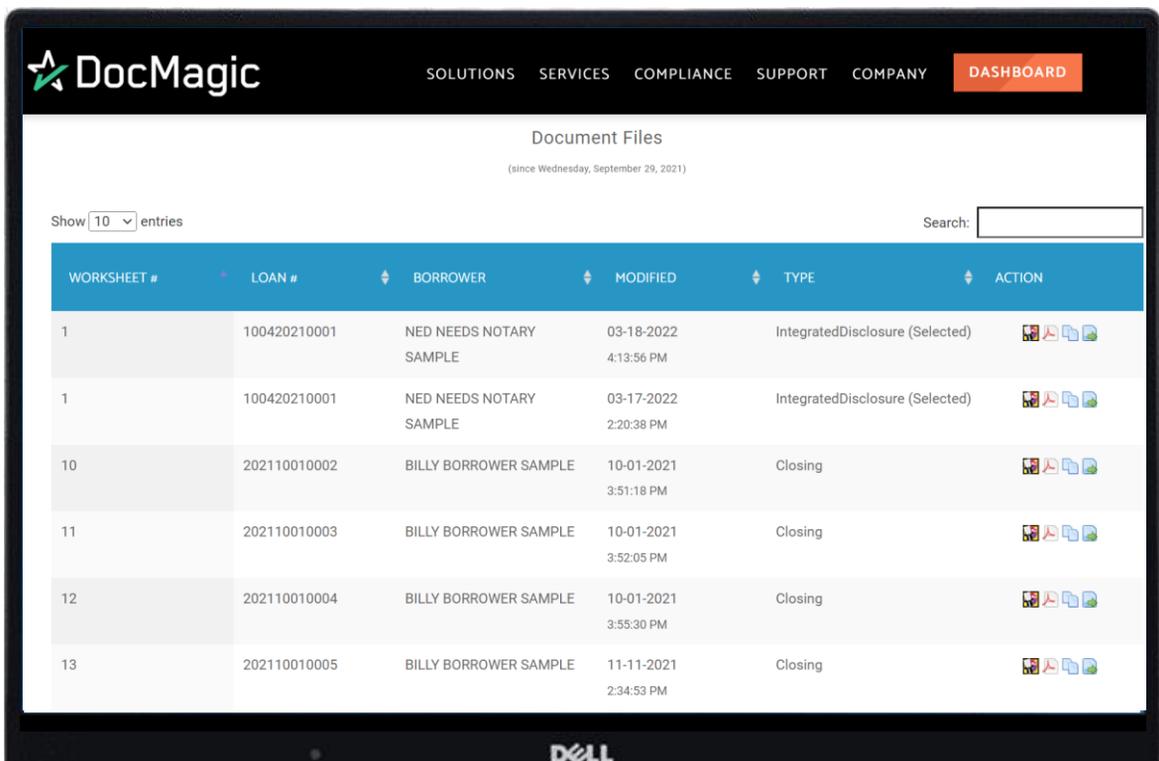
The UCD Report will be created and delivered to the GSE with the Closing Disclosure automatically embedded.



# Document Files

## Creating a UCD XML

If you're not using DocMagic to deliver the UCD report, you can still create the XML and embed the CD with DocMagic.



The screenshot shows the DocMagic interface. At the top, there is a navigation bar with links for SOLUTIONS, SERVICES, COMPLIANCE, SUPPORT, COMPANY, and a DASHBOARD button. Below the navigation bar, the page title is 'Document Files' with a subtitle '(since Wednesday, September 29, 2021)'. There is a search bar and a 'Show 10 entries' dropdown. The main content is a table with the following columns: WORKSHEET #, LOAN #, BORROWER, MODIFIED, TYPE, and ACTION. The table contains six rows of data.

WORKSHEET #	LOAN #	BORROWER	MODIFIED	TYPE	ACTION
1	100420210001	NED NEEDS NOTARY SAMPLE	03-18-2022 4:13:56 PM	IntegratedDisclosure (Selected)	
1	100420210001	NED NEEDS NOTARY SAMPLE	03-17-2022 2:20:38 PM	IntegratedDisclosure (Selected)	
10	202110010002	BILLY BORROWER SAMPLE	10-01-2021 3:51:18 PM	Closing	
11	202110010003	BILLY BORROWER SAMPLE	10-01-2021 3:52:05 PM	Closing	
12	202110010004	BILLY BORROWER SAMPLE	10-01-2021 3:55:30 PM	Closing	
13	202110010005	BILLY BORROWER SAMPLE	11-11-2021 2:34:53 PM	Closing	

You must first process a loan package that contains a Closing Disclosure before you'll be able to access the green arrow action button for that Document File.



# Document Files

## Creating a UCD XML

Check "save as", then click "Ok" to create a UCD XML.

The screenshot shows the DocMagic 'Document Files' interface. A table lists worksheets with columns for Worksheet #, Load, and Action. An 'Export Utility' dialog box is open, showing 'Export Type' set to 'Uniform Closing Dataset (UCD)'. The 'Save as...' radio button is selected, and the 'OK' button is highlighted. A blue arrow points from the text box above to the 'Save as...' button, and another blue arrow points from the 'OK' button to the text box below.

WORKSHEET #	LOAD	ACTION
1	10042	Export Type: Uniform Closing Dataset (UCD)
1	10042	Save as... (selected)
10	20211	Submit to Third Party
11	20211	System Name: Select Third Party
12	20211	3:55:30 PM
13	202110010005	BILLY BORROWER SAMPLE 11-11-2021 Closing 2:34:53 PM

The XML can then be saved to your desktop or a folder of your choice.



# Document Files

## Creating the Closing Disclosure PDF

In the same loan that you ran the UCD XML, the CD can be saved as a PDF from the list of forms in DocMaster – Click on the DocMaster button.

The screenshot shows the DocMagic web interface. At the top, there is a navigation bar with the DocMagic logo and menu items: SOLUTIONS, SERVICES, COMPLIANCE, SUPPORT, COMPANY, and a DASHBOARD button. Below the navigation bar, the page title is "Document Files" with a subtitle "(since Wednesday, September 29, 2021)". There is a "Show 10 entries" dropdown and a search box. The main content is a table with the following columns: WORKSHEET #, LOAN #, BORROWER, MODIFIED, TYPE, and ACTION. The table contains seven rows of data. The first two rows have "IntegratedDisclosure (Selected)" as the type, and the remaining five rows have "Closing" as the type. In the ACTION column, each row has a set of icons. A green box highlights the DocMaster icon (a document with a star) in the first row, and a blue arrow points from the text box above to this icon.

WORKSHEET #	LOAN #	BORROWER	MODIFIED	TYPE	ACTION
1	100420210001	NED NEEDS NOTARY SAMPLE	03-18-2022 4:13:56 PM	IntegratedDisclosure (Selected)	[DocMaster] [Print] [Export]
1	100420210001	NED NEEDS NOTARY SAMPLE	03-17-2022 2:20:38 PM	IntegratedDisclosure (Selected)	[DocMaster] [Print] [Export]
10	202110010002	BILLY BORROWER SAMPLE	10-01-2021 3:51:18 PM	Closing	[DocMaster] [Print] [Export]
11	202110010003	BILLY BORROWER SAMPLE	10-01-2021 3:52:05 PM	Closing	[DocMaster] [Print] [Export]
12	202110010004	BILLY BORROWER SAMPLE	10-01-2021 3:55:30 PM	Closing	[DocMaster] [Print] [Export]
13	202110010005	BILLY BORROWER SAMPLE	11-11-2021 2:34:53 PM	Closing	[DocMaster] [Print] [Export]

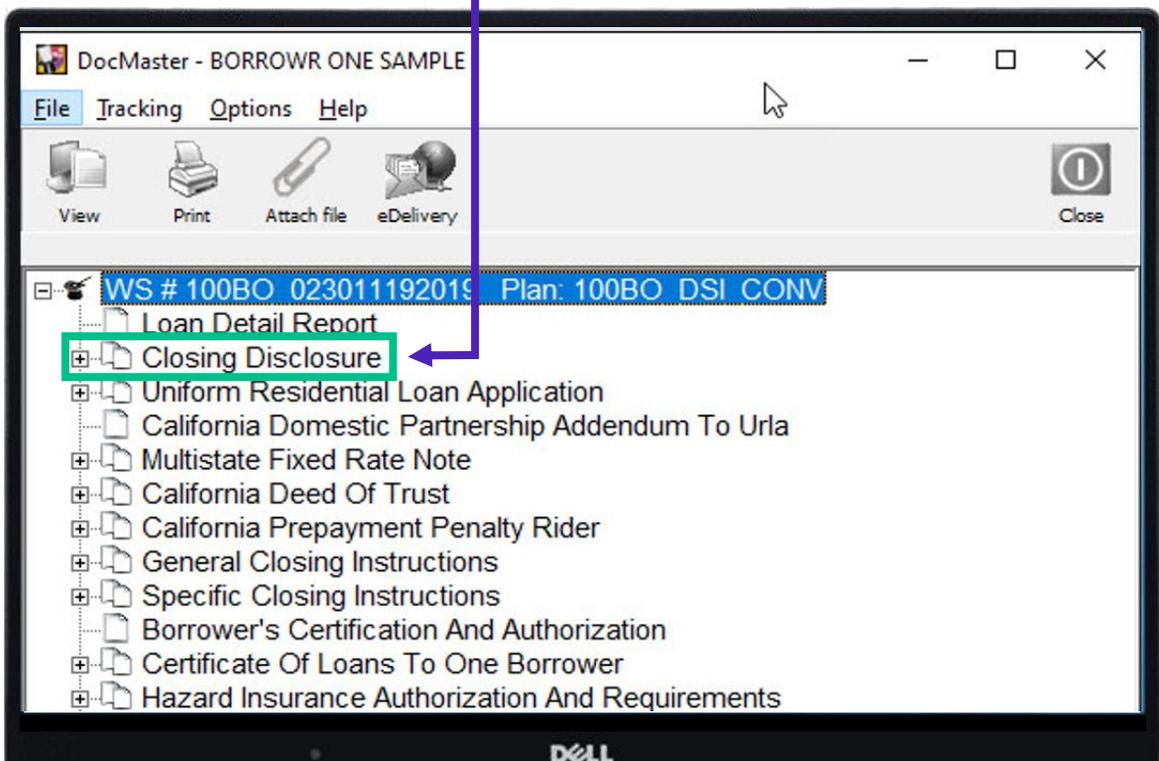
You must have DocMaster installed your computer.  
For more information about DocMaster, click [here](#).



# Document Files

## Creating the Closing Disclosure PDF

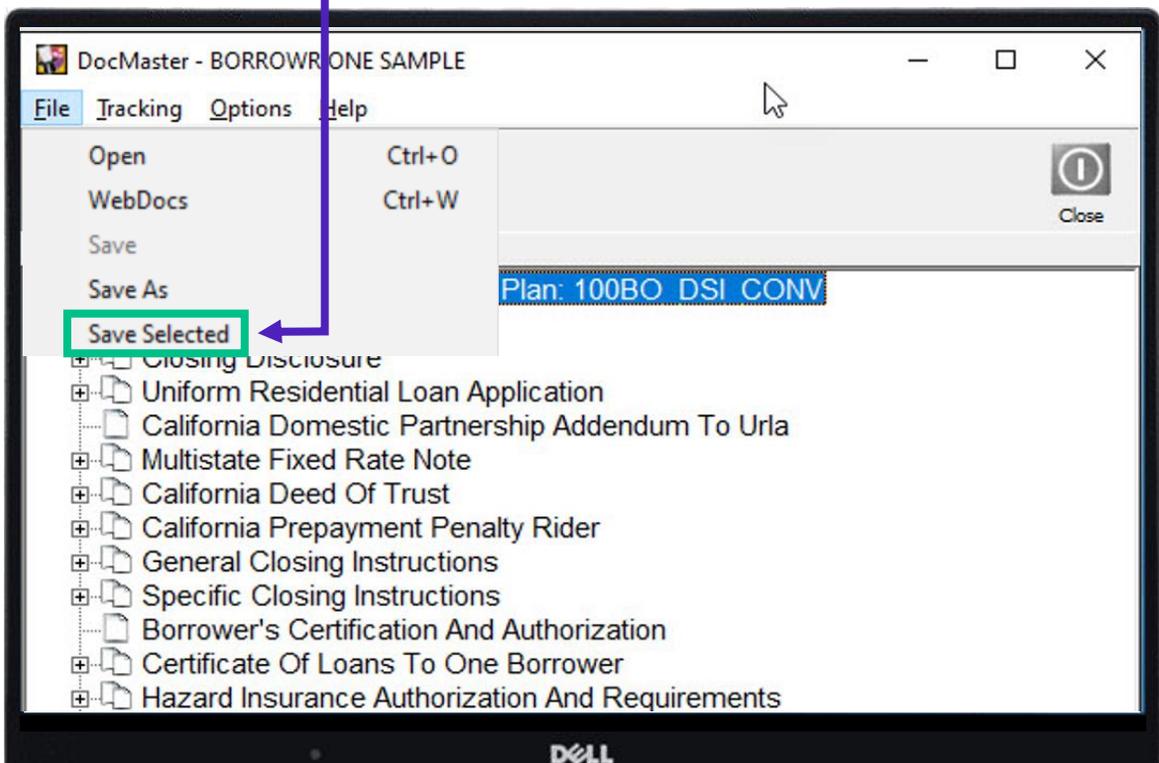
Open the file in DocMaster and click on the Closing Disclosure to highlight it.



# Document Files

## Creating the Closing Disclosure PDF

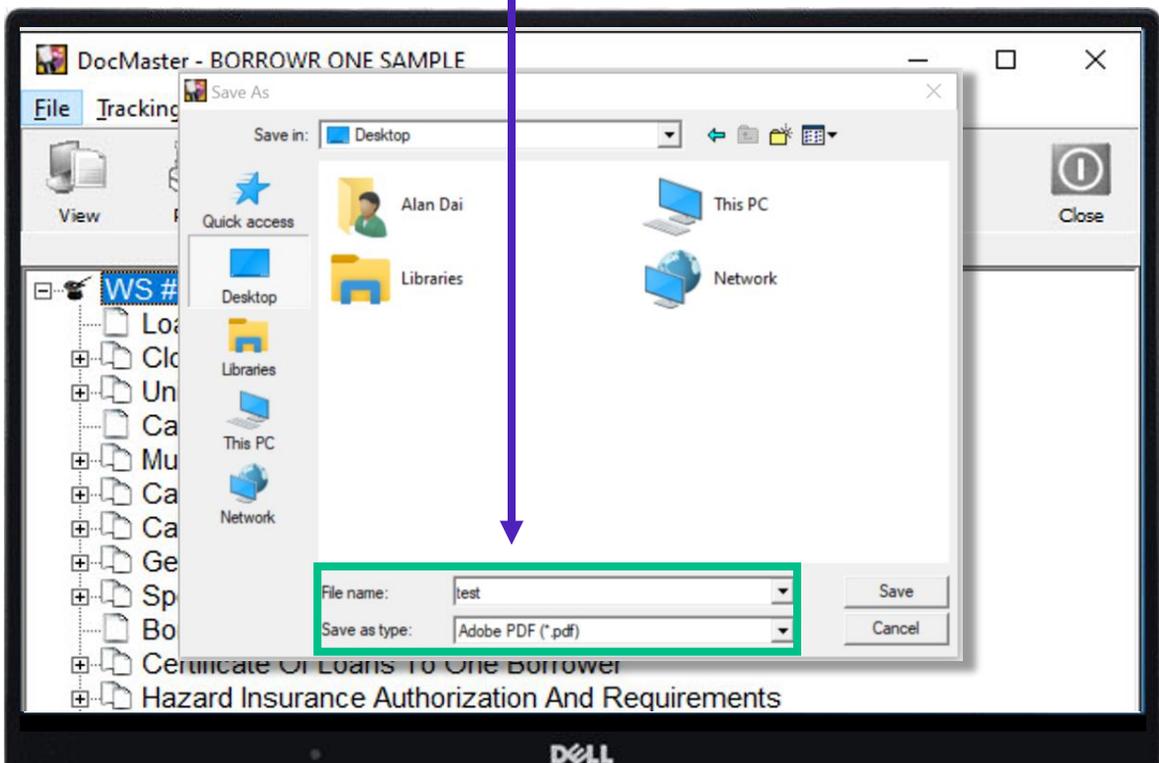
Click "File", then "Save Selected".



# Document Files

## Creating the Closing Disclosure PDF

Enter a File Name and select "Adobe PDF" from the "Save as type" drop down.



You now have your XML and Closing Disclosure to send to your GSE of choice.

