

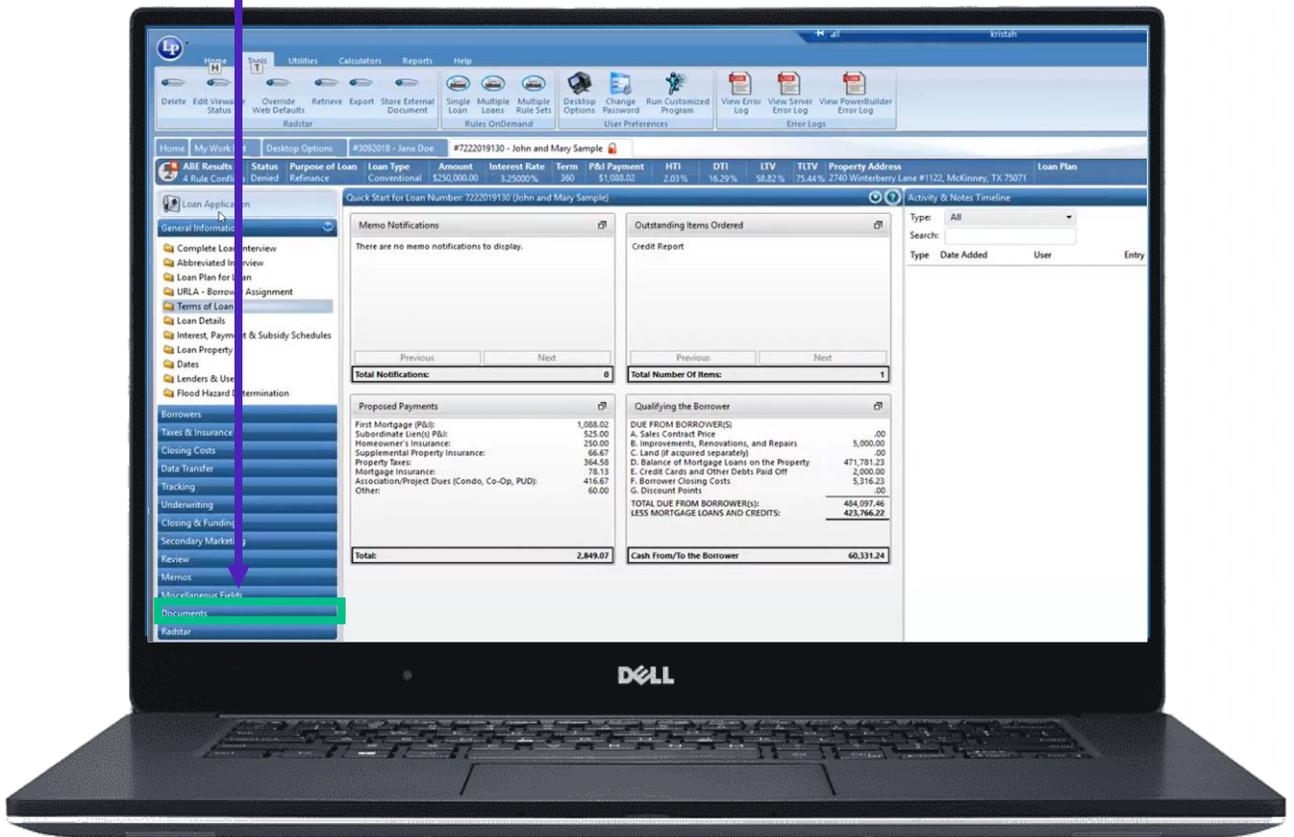


Loan Producer

Loan Producer

Getting Started with DocMagic

After all origination information has been entered and documents are ready to be ordered – select documents.



Loan Producer

Getting Started with DocMagic

Select DocMagic Interface.

The screenshot displays the 'Loan Application' software interface. The left-hand navigation menu is expanded to the 'Documents' section, where 'DocMagic Interface' is highlighted with a green box and a blue arrow. The main window title is 'Quick Start for Loan Number: 7222019130 (John and Mary Sample)'. The interface is divided into several panels:

- Memo Notifications:** A panel with the text 'There are no memo notifications to display.' and 'Previous' and 'Next' buttons. Below it, a summary row shows 'Total Notifications: 0'.
- Outstanding Items Ordered:** A panel with the text 'Credit Report' and 'Previous' and 'Next' buttons. Below it, a summary row shows 'Total Number Of Items: 1'.
- Proposed Payments:** A table listing various payment items and their amounts.
- Qualifying the Borrower:** A table listing borrower-related items and their amounts.

Item	Amount
First Mortgage (P&I):	1,088.02
Subordinate Lien(s) P&I:	525.00
Homeowner's Insurance:	250.00
Supplemental Property Insurance:	66.67
Property Taxes:	364.58
Mortgage Insurance:	78.13
Association/Project Dues (Condo, Co-Op, PUD):	416.67
Other:	60.00
Total:	2,849.07

Item	Amount
DUE FROM BORROWER(S)	
A. Sales Contract Price	.00
B. Improvements, Renovations, and Repairs	5,000.00
C. Land (if acquired separately)	.00
D. Balance of Mortgage Loans on the Property	471,781.23
E. Credit Cards and Other Debts Paid Off	2,000.00
F. Borrower Closing Costs	5,316.23
G. Discount Points	.00
TOTAL DUE FROM BORROWER(S):	484,097.46
LESS MORTGAGE LOANS AND CREDITS:	423,766.22
Cash From/To the Borrower	60,331.24



Loan Producer

Attaching Documents

If you have documents that need to be attached to the package – click here.

Document Services Interface for Loan Number: 7222019130 (John and Mary Sample)

Request Response

Vendor Order Identifier: 7222019130

eSign?

Mail Package?

Comments/Special Instructions:

Company Name: DocMagic

Company Type: Document Systems, Inc. (DocMagic)

Interface User Name: kristaharris@fics.com

3.3

Attach Documents

Select File from Filestore. Retrieve Radstar Document

Cancel

Product(s)	Product	CD?	Includes GFE?	Includes TIL?
<input type="checkbox"/>	Adverse Action Adverse	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Closing Disclosure - Purchase ClosingDisclosure	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Closing Disclosure - Refinance ClosingDisclosure	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Closing Package - Purchase Closing	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Closing Package - Refinance Closing	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Website: <https://stage-www.docmagic.com/web/services/cas/login>

Click here to attach a file from your computer.



Loan Producer

Selecting A Package – Initial Disclosures

For now – make sure that eSign is NOT checked.

Document Services Interface for Loan Number: 7222019130 (John and Mary Sample)

Request Response

Vendor Order Identifier: 7222019130

eSign?

Mail Package?

Comments/Special Instructions:

Company Name: DocMagic
Company Type: Document Systems, Inc. (DocMagic)
Interface User Name: kristaharris@fics.com
MISMO Version: 3.3

Attach Documents

Product	Product ID	Includes LE?	Includes CD?	Includes GFE?	Includes TIL?
<input type="checkbox"/> Closing Package - Purchase	Closing	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Closing Package - Refinance	Closing	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Initial Disclosures - Purchase	Predisclosure	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Initial Disclosures - Refinance	Predisclosure	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Loan Application - Purchase	LoanApplication	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Website: <https://stage-www.docmagic.com/webservices/cas/login>

These columns allow the customer to easily identify which documents are included in what package.



Loan Producer

Selecting A Package – Initial Disclosures

Check the document package of your choice. Note that Loan Producer can process both initial and closing disclosures, along with closing packages (covered at the end of the guide).

The screenshot displays the DocMagic Document Services Interface for Loan Number: 7222019130 (John and Mary Sample). The interface includes a left-hand navigation menu with categories like General Information, Borrowers, Taxes & Insurance, Closing Costs, Data Transfer, Tracking, Underwriting, Closing & Funding, Secondary Marketing, Review, Memos, Miscellaneous Fields, and Documents. The main content area shows a 'Request' tab with fields for Vendor Order Identifier (7222019130), eSign?, Mail Package?, and Comments/Special Instructions. A table titled 'Attach Documents' lists various document packages with checkboxes for selection. The 'Initial Disclosures - Refinance' package is selected. Below the table, there is a 'Website' field with a URL. At the bottom right, there are 'Menu', 'Submit', and 'Close' buttons. A purple arrow points from the text box above to the 'Submit' button.

Product	Product ID	Includes LE?	Includes CD?	Includes GFE?	Includes TIL?
<input type="checkbox"/> Closing Package - Purchase	Closing	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Closing Package - Refinance	Closing	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Initial Disclosures - Purchase	Predisclosure	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Initial Disclosures - Refinance	Predisclosure	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Loan Application - Purchase	LoanApplication	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Click Submit.



Loan Producer

Loan Status Triggers

If you have Loan Status Triggers set up, you will see this Warning confirming if you want to change the status. Click Yes.

The screenshot displays the DocMagic Document Services Interface for Loan Number: 7222019130 (John and Mary Sample). The interface includes a left-hand navigation menu with categories like Loan Application, General Information, Borrowers, Taxes & Insurance, Closing Costs, Data Transfer, Tracking, Underwriting, Closing & Funding, Secondary Marketing, Review, Memos, Miscellaneous Fields, and Documents. The main content area shows a 'Request' and 'Response' section with fields for Vendor Order Identifier (7222019130), eSign?, Mail Package?, and Comments/Special Instructions. A 'Loan Status Triggers' dialog box is overlaid on the interface, displaying a warning: 'Warning - The Status Code will be changed from [Denied] to [Early Disclosures]. Do you want to change the Status to [Early Disclosures]?' with 'Yes' and 'No' buttons. The 'Yes' button is highlighted with a green box. Below the dialog, a table lists various document triggers with checkboxes for selection.

Document	Category	Request	Response	Includes TIL?
<input type="checkbox"/> Closing Package - Purchase	Closing	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Closing Package - Refinance	Closing	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Initial Disclosures - Purchase	Predisclosure	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Initial Disclosures - Refinance	Predisclosure	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Loan Application - Purchase	LoanApplication	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Website: <https://stage-www.docmagic.com/webservices/cas/login>



Loan Producer

Review Documents

The documents selected in your package will appear in the response tab.

Document Services Interface for Loan Number: 7222019130 (John and Mary Sample)

Request **Response**

Product:	# of Documents:	# of Messages:	Date Ordered:	eSign?
Initial Disclosures - Refinance	26	50	1/20/2021 10:15:00 AM	

Document(s) (26)

[View Combined PDFs](#)
[Loan Detail Report.DS](#)
[Loan Detail Report.pdf](#)
[Evidence of Joint Application.pdf](#)
[Uniform Residential Loan Appli0.pdf](#)
[Uniform Residential Loan Appli0.pdf](#)
[Borrowers Certification and Au.pdf](#)
[T - Request for Transcript of .pdf](#)
[T - Request for Transcript of 1.pdf](#)
[Additional Details for Service.pdf](#)

Menu

- Delete Package
- View Messages (50)
- Re-Submit Package
- Disclose To Borrower
- Open in DocMaster

Product:	# of Documents:	# of Messages:	Date Ordered:	eSign?
Underwriting	10	53	12/9/2020 1:41:00 PM	

Click on any hyperlink to open an individual document. "View Combined PDFs" at the top of the stack allows you to view the whole package.



Loan Producer

Re-Submitting The Package

After reviewing the information, re-submit the package.

The screenshot displays a web-based interface for loan management. On the left is a navigation menu with categories like 'General Information', 'Borrowers', 'Taxes & Insurance', 'Closing Costs', 'Data Transfer', 'Tracking', 'Underwriting', 'Closing & Funding', 'Secondary Marketing', 'Review', 'Memos', 'Miscellaneous Fields', and 'Documents'. The main area is titled 'Document Services Interface for Loan Number: 7222019130 (John and Mary Sample)'. It shows a summary of documents and messages, and a list of documents. A modal dialog box is open, asking 'Are you sure you want to re-submit and replace this Package?' with 'Yes' and 'No' buttons. A blue arrow points from a text box below to the 'Yes' button.

Product	# of Documents	# of Messages	Date Ordered	eSign?
Initial Disclosures - Refinance	26	50	1/20/2021 10:15:00 AM	
Underwriting	10	53	12/9/2020 1:41:00 PM	

Click Yes.



Loan Producer

Re-Submitting The Package

A second window will appear.

The screenshot displays the Document Services Interface for Loan Number: 7222019130 (John and Mary Sample). The interface is divided into a left sidebar and a main content area. The sidebar contains a navigation menu with categories like General Information, Borrowers, Taxes & Insurance, Closing Costs, Data Transfer, Tracking, Underwriting, Closing & Funding, Secondary Marketing, Review, Memos, Miscellaneous Fields, and Documents. The main content area shows a table of documents and messages, and a modal dialog box asking 'Would you like to re-submit with eSign?' with 'Yes' and 'No' buttons. A purple arrow points to the 'Yes' button.

Product	# of Documents	# of Messages	Date Ordered	eSign?
Initial Disclosures - Refinance	26	50	1/20/2021 10:15:00 AM	
Underwriting	10	53	12/9/2020 1:41:00 PM	

Click Yes again.



Loan Producer

eSign

An eSign checkmark will appear to indicate that the package was submitted via eSign.

Document Services Interface for Loan Number: 7222019130 (John and Mary Sample)

Request Response

Product:	# of Documents:	# of Messages:	Date Ordered:	eSign?
Initial Disclosures - Refinance	26	53	1/20/2021 10:17:00 AM	<input checked="" type="checkbox"/>

Document(s) (26)

- [View Combined PDFs](#)
- [Loan Detail Report.DS](#)
- [Loan Detail Report.pdf](#)
- [Evidence of Joint Application.pdf](#)
- [Uniform Residential Loan Appli.pdf](#)
- [Uniform Residential Loan Appli0.pdf](#)
- [Borrowers Certification and Au.pdf](#)
- [T - Request for Transcript of .pdf](#)
- [T - Request for Transcript of 1.pdf](#)
- [Additional Details for Service.pdf](#)

Menu

- Delete Package
- View Messages (53)
- Re-Submit Package
- Disclose To Borrower
- Open in DocMaster
- Retrieve eSign PDF's**
- Retrieve eSign Messages**

Product:	# of Documents:	# of Messages:	Date Ordered:	eSign?
Underwriting	10	53	12/9/2020 1:41:00 PM	

Print Any Document
Document Bundles
Combine PDF Documents
Asurity Technologies Interface
DocMagic Interface
Document Service Provider Interface
DocuPrep Interface
IDS Interface
PPDocs Interface
Radstar

Options to Retrieve eSign PDF's and Retrieve eSign Messages appear.



Loan Producer

eSign

Click Retrieve eSign Messages for a log of time stamped actions.

The screenshot displays the 'Document Services Interface for Loan Number: 7222019130 (John and Mary Sample)'. The interface includes a left-hand navigation menu with categories like 'Loan Application', 'General Information', 'Borrowers', 'Taxes & Insurance', 'Closing Costs', 'Data Transfer', 'Tracking', 'Underwriting', 'Closing & Funding', 'Secondary Marketing', 'Review', 'Memos', 'Miscellaneous Fields', and 'Documents'. The main content area shows document details for 'Initial Disclosures - Refinance' with 26 documents and 53 messages, ordered on 1/20/2021 at 10:17:00 AM. A 'Menu' is open over the document list, highlighting the 'Retrieve eSign Messages' option. Below this, a 'DocMagic Messages' window displays a table of events:

Create Date	Created By	Event Type	Note	IP Address
12/16/2020 10:01 PM		REQUEST_PAPER_COPY	eSign event expired	10.1.131.33
12/15/2020 11:01 AM		NOTE_TO_SENDER	Reminder sent to kristaharris@fics.com (eSign Reminder [Loan Number: 7222019130])	10.1.131.33
12/14/2020 11:01 AM		CREATE_SIGREQ	eSign event created	10.1.131.34
12/14/2020 11:01 AM	krista.harris2013@att.net	SEND_SIGREQ_INVITE	Invitation sent to krista.harris2013@att.net	10.1.131.34
12/14/2020 11:01 AM	kristaharris@fics.com	SEND_SIGREQ_INVITE	Invitation sent to kristaharris@fics.com	10.1.131.34

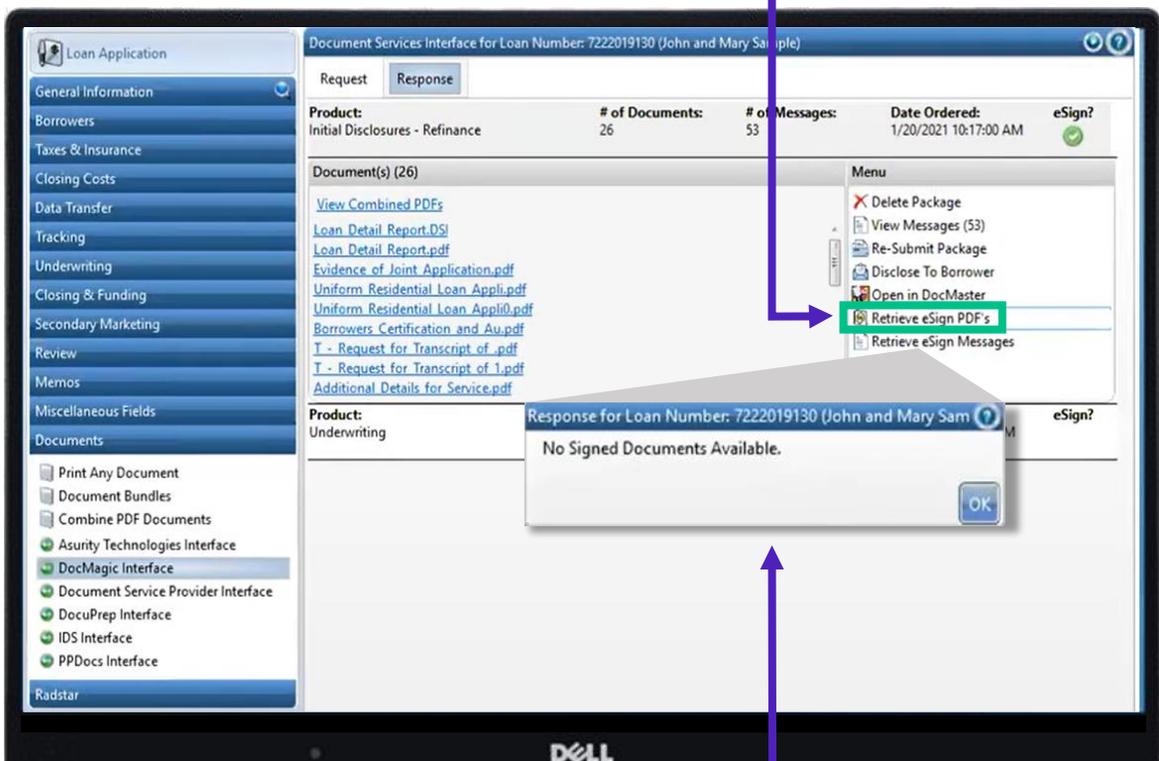
The interface also features a 'Documents' section on the left with options like 'Print Any Document', 'Document Bundles', 'Combine PDF Documents', and various interfaces (Asurity Technologies, DocMagic, Document Service Provider, DocuPrep, IDS, PPDocs, Radstar). The Dell logo is visible at the bottom center of the screen.



Loan Producer

eSign

Once the package is signed, you'll be able to retrieve signed PDFs of the documents here.



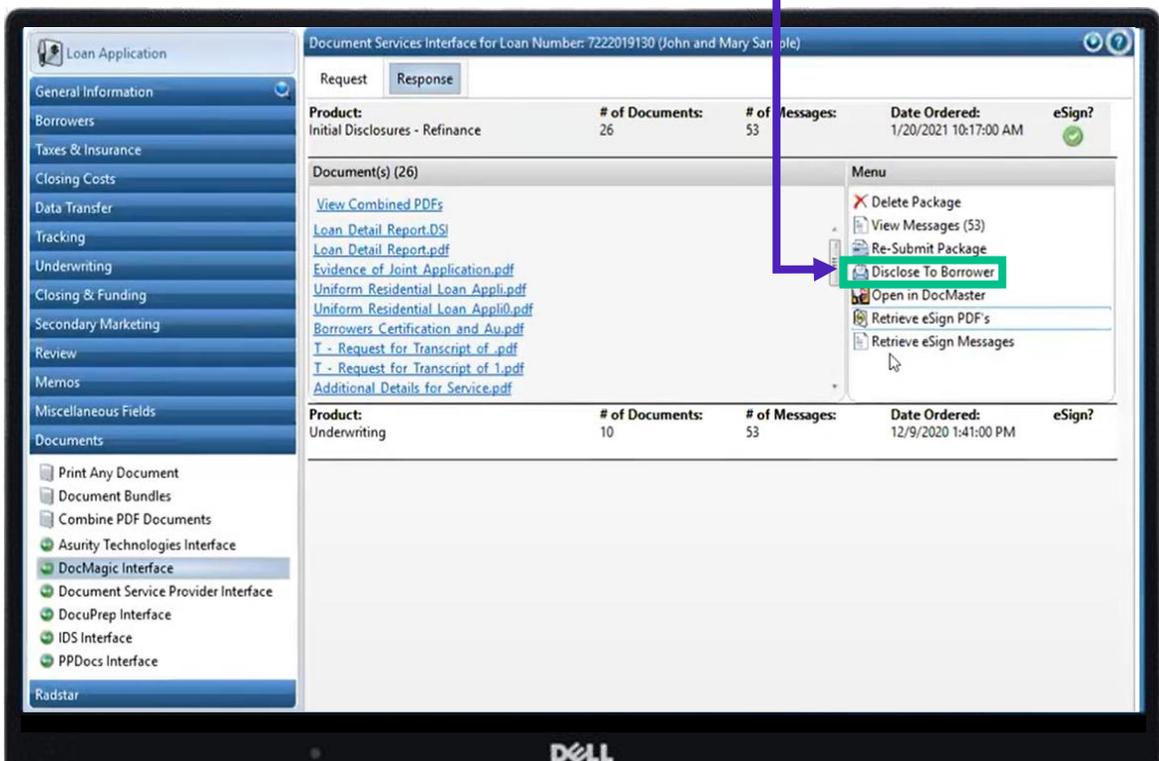
Before then, you will receive this message if you click on Retrieve eSign PDF's.



Loan Producer

Disclose to Borrower

Next, click Disclose to Borrower.



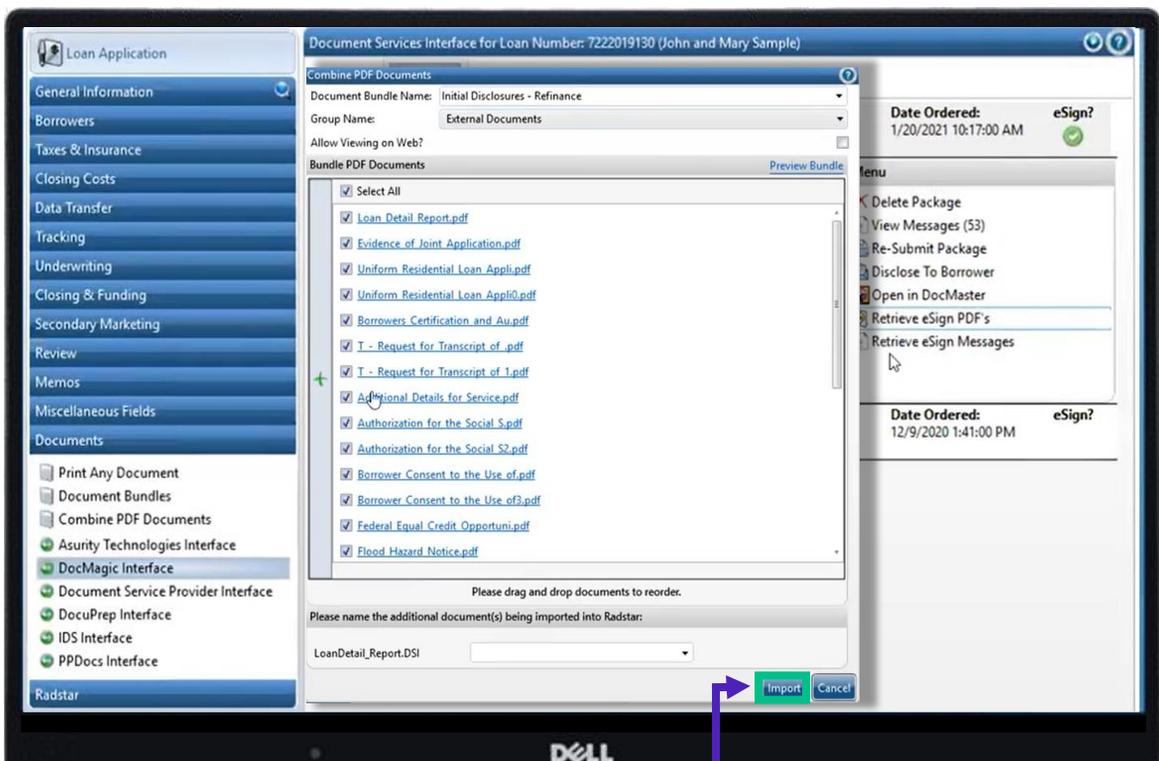
This creates a record to indicate that the Loan Estimate was disclosed and sets tolerances for the baseline because there is a Loan Estimate in the package.



Loan Producer

Combine PDF Documents

The Combine PDF Documents window appears which allows you to add additional documents to the package or change the order.



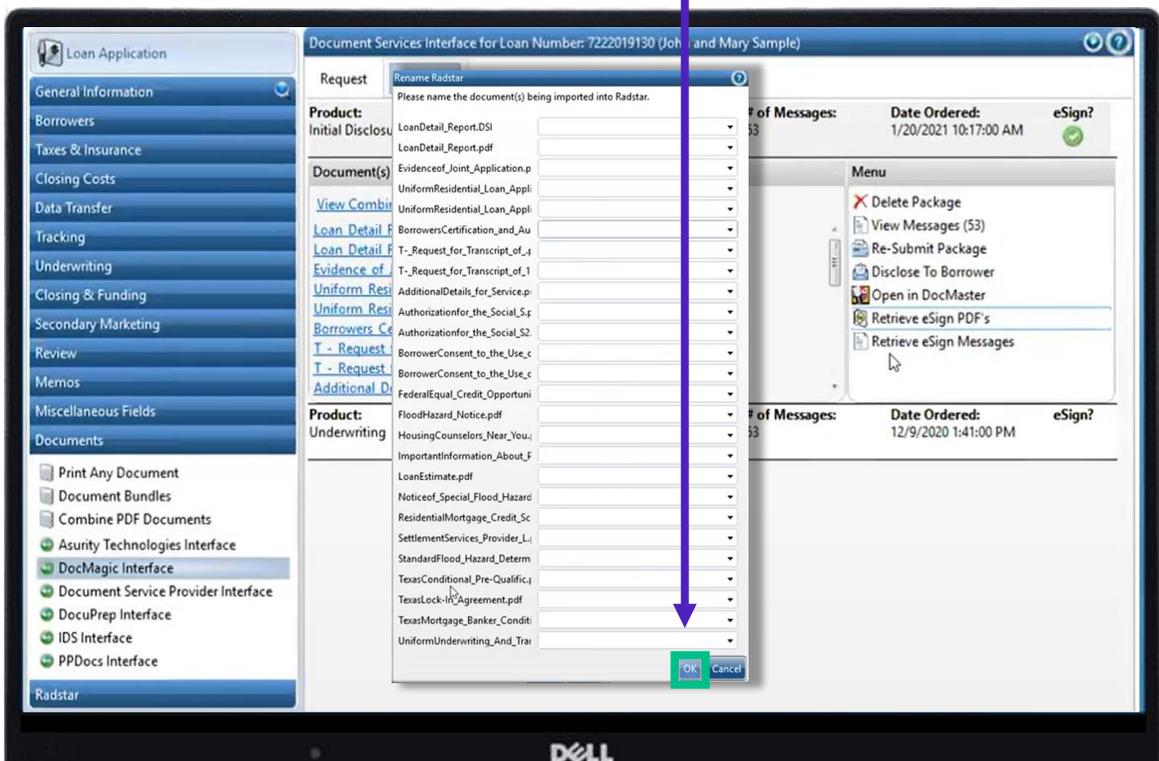
Click here to Import.



Loan Producer

Bypass

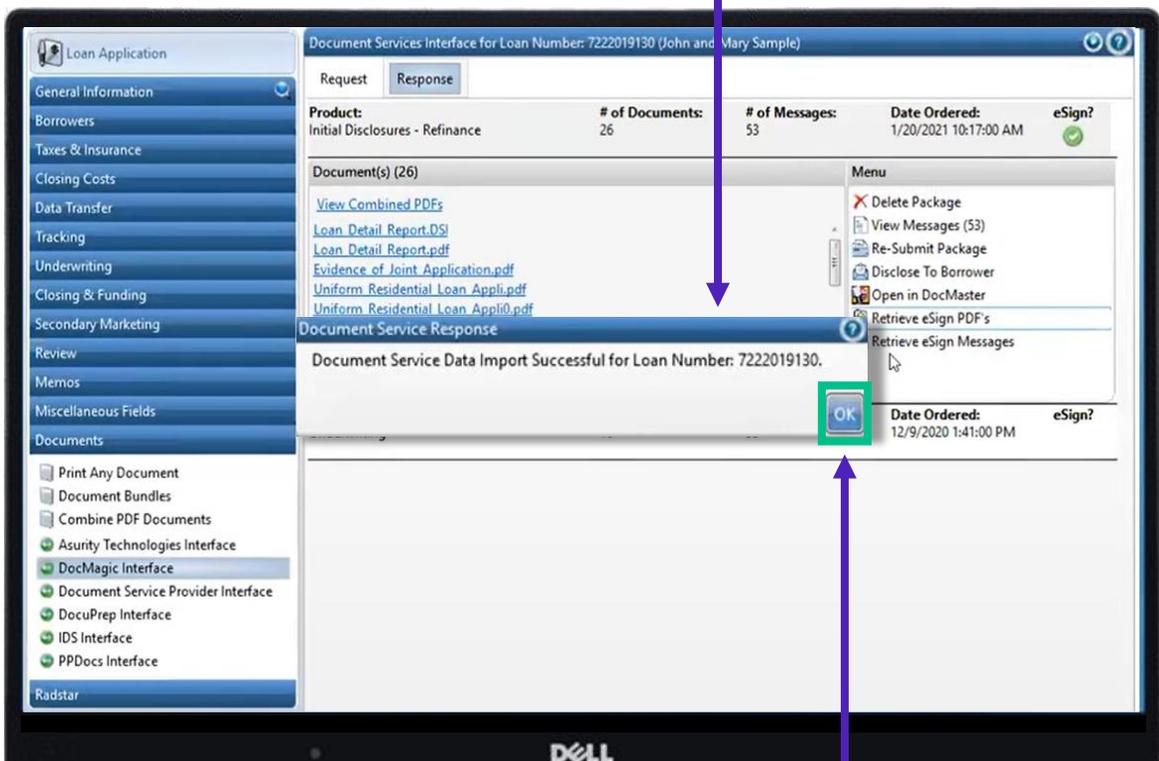
Hit Ok to bypass this menu (allows importation of individual documents – not relevant).



Loan Producer

Success

This window appears telling you that everything was successful.



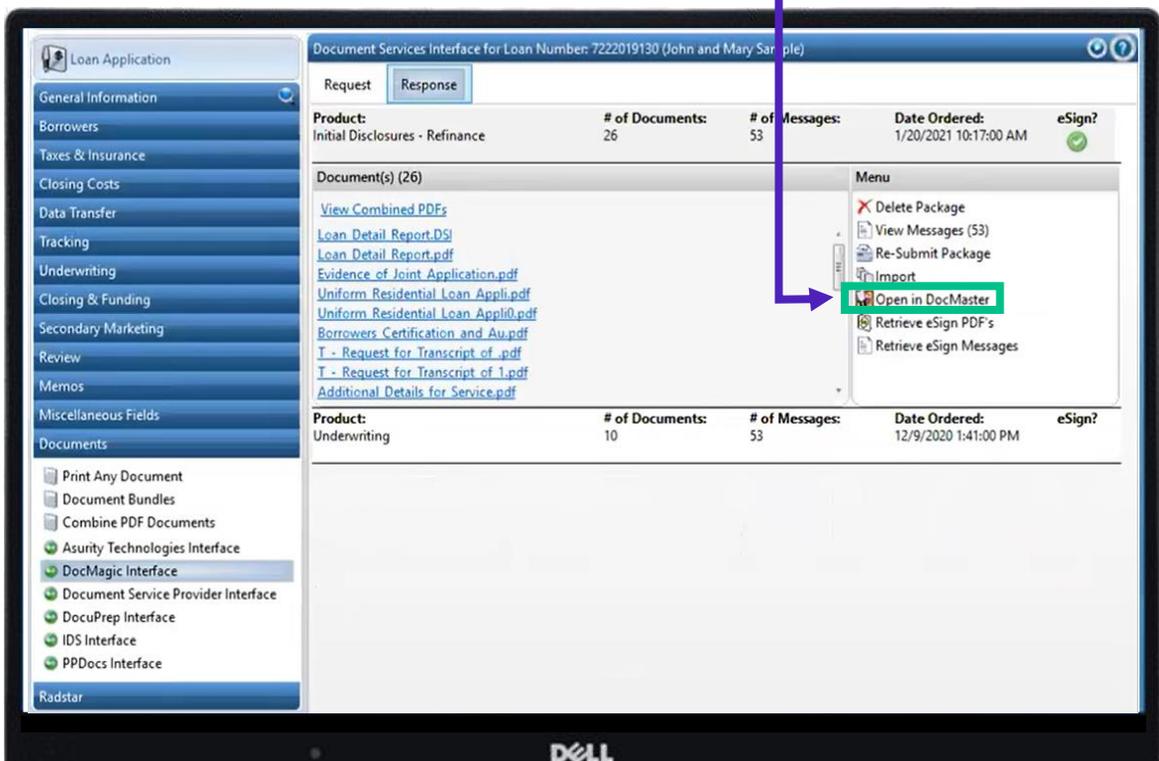
Click OK.



Loan Producer

DocMaster

You can open the finished package in DocMaster and send it straight to a title company.



The DocMaster application, if installed on your computer, will automatically open once the link is clicked.



Loan Producer

Total eClose

If you're doing Total eClose, your options will be here. eSign should always be checked. eNote and eNotary should be checked based on your closing type.

Document Services Interface for Loan Number: 1234567891 (Michael Sample)

Request Response

Vendor Order Identifier: 1234567891

eSign?

eNote?

eNotary? Type:

Mail Package?

Comments/Special

Company Name: DocMagic
Company Type: Document Systems, Inc. (DocMagic)
Interface User Name: david@docmagic.com
MISMO Version: 3.3

Attach Documents

Product(s)	Product ID	Includes LE?	Includes CD?	Includes GFE?	Includes TIL?
<input type="checkbox"/> Closing	Closing	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Electronic Note	Enote	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Initial Disclosure	Predisclosure	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Loan Application	LoanApplication	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Underwriting Package	Underwriting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Website: <https://stage-www.docmagic.com/webserver/ces/authentication/api/v1/authenticate>

If you check eNotary, please select a provider as well.



Loan Producer

Total eClose

Select your package next. You can run a Closing package, or just the Note. Then, click Submit in the bottom right.

Document Services Interface for Loan Number: 1234567891 (Michael Sample)

Request Response

Vendor Order Identifier: 1234567891

eSign?

eNote?

eNotary? Type: DocMagic

Mail Package?

Comments Special Instructions:

Company Name: DocMagic

Company Type: Document Systems, Inc. (DocMagic)

Interface User Name: david@docmagic.com

MISMO Version: 3.3

Attach Documents

Product(s)	Product ID	Includes LE?	Includes CD?	Includes GFE?	Includes T...
<input checked="" type="checkbox"/> Closing	Closing	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Electronic Note	Enote	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Initial Disclosure	Predisclosure	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Loan Application	LoanApplication	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Underwriting Package	Underwriting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Website: <https://stage-www.docmagic.com/webservices/authentication/api/v1/authenticate>

Submit



Loan Producer

Total eClose

Make sure you have information entered for the Settlement and Closing Agents, if necessary.

The screenshot displays the 'Closing Information for Loan Number: 1234567891 (Michael Sample)' window. The left sidebar shows a navigation menu with 'Closing Information' selected. The main area is divided into two tabs: 'Settlement Agent' and 'Closing Agent'. The 'Settlement Agent' tab is active, showing fields for Name (Settlement Test), Address (1234 Settle St), City (Torrance), State (CA), Zip (90501), License Number (23456), TIN (00-000000), Contact (Settle Ment), Phone ((310) 999-8888 Ext:), Fax (() -), E-mail (shannon@docmagic.com), and Contact License Number (7890). The 'Closing Agent' tab is also visible, showing fields for Name (Closing Sample), Address (567 Closing Ave), City (Torrance), State (CA), Zip (90501), License Number (654321), License Authority Type, and License State (CA). The right side of the window contains sections for 'Escrow' (Account Number, Title Policy Information, Endorsements, Exception Items, Tax Message) and 'Closing Location' (Same as Settlement Agent?, County (Los Angeles - LA - CA), Address (1234 Settle St), City (Torrance), State (CA), Zip (90501), Closing Time (05:00 AM/PM), Scheduled Closing Date (10/20/2023)).

This can be accessed by going to Closing & Funding on the left and selecting Closing Information, and then the Settlement Info tab.



Loan Producer

Total eClose

If the request was successful, you should see the package and all the participants in the [eSign Console](#).

The screenshot displays the eSign Console interface for a loan. At the top, there are tabs for 'Details', 'Documents', 'Documents Received', 'EMails', and 'Versions'. The 'Details' tab is active, showing the following information:

- Loan #: 1234567891
- Primary Name: Michael B Sample
- Type: EClosing
- Package Id: 1285706
- Worksheet #: 1234567891 (Version : 6)
- Closing Date: 10/20/23
- Lender: David Garrett
- DOCMAGIC TEST ACCOUNT (100DBG)
- david@docmagic.com
- (888)555-1212
- Status: New (Active)
- Documents: 33 (92 total pages)
- Signers: 4
- Expires: N/A (Requires: Primary)
- Signatures: Y

Below the details, there is a 'Participants' section with a '+ icon' and 'Preview Mode - Off'. It contains a table with the following data:

#	Name/Email	Role	Created	Started	Consented	Viewed	Completed	Declined	Links
1	Michael B Sample shannon@docmagic.com	Borrower	10/17/24 2:02 PM						Send Email Sign Documents
2	Closing Agent shannon@docmagic.com	Settlement Agent	10/17/24 2:02 PM						Send Email Agent Portal
4	Omar Originator shannon@docmagic.com	Originator	10/17/24 2:02 PM						Send Email Sign Documents
5	Notary_name_placeholder -1 NOTARY_EMAIL_PLACEHOLDER-1	Notary	10/17/24 2:02 PM						Send Email

Below the participants, there is an 'Action Log' section with a mouse cursor over the title. It contains a table with the following data:

Date	User	IP Address	Description
10/17/24 2:02 PM	System User		eSign event created and expires on 10/17/2024
10/17/24 2:02 PM	Michael Sample		Invitation sent to shannon@docmagic.com
10/17/24 2:02 PM	Closing Agent		Invitation sent to shannon@docmagic.com
10/17/24 2:02 PM	Omar Originator		Invitation sent to shannon@docmagic.com

The Dell logo is visible at the bottom center of the screen.

