

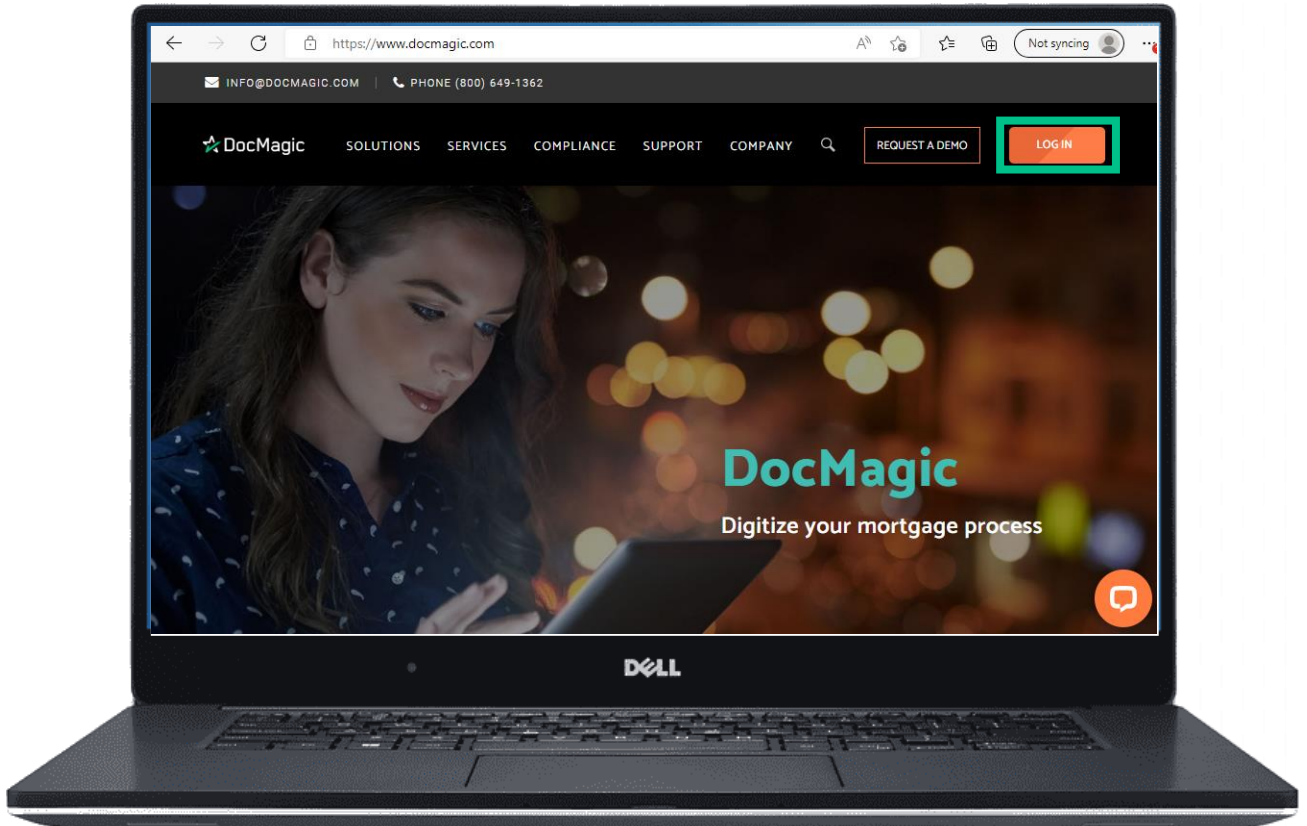


Report Manager

# Report Manager

## Navigating to Report Manager

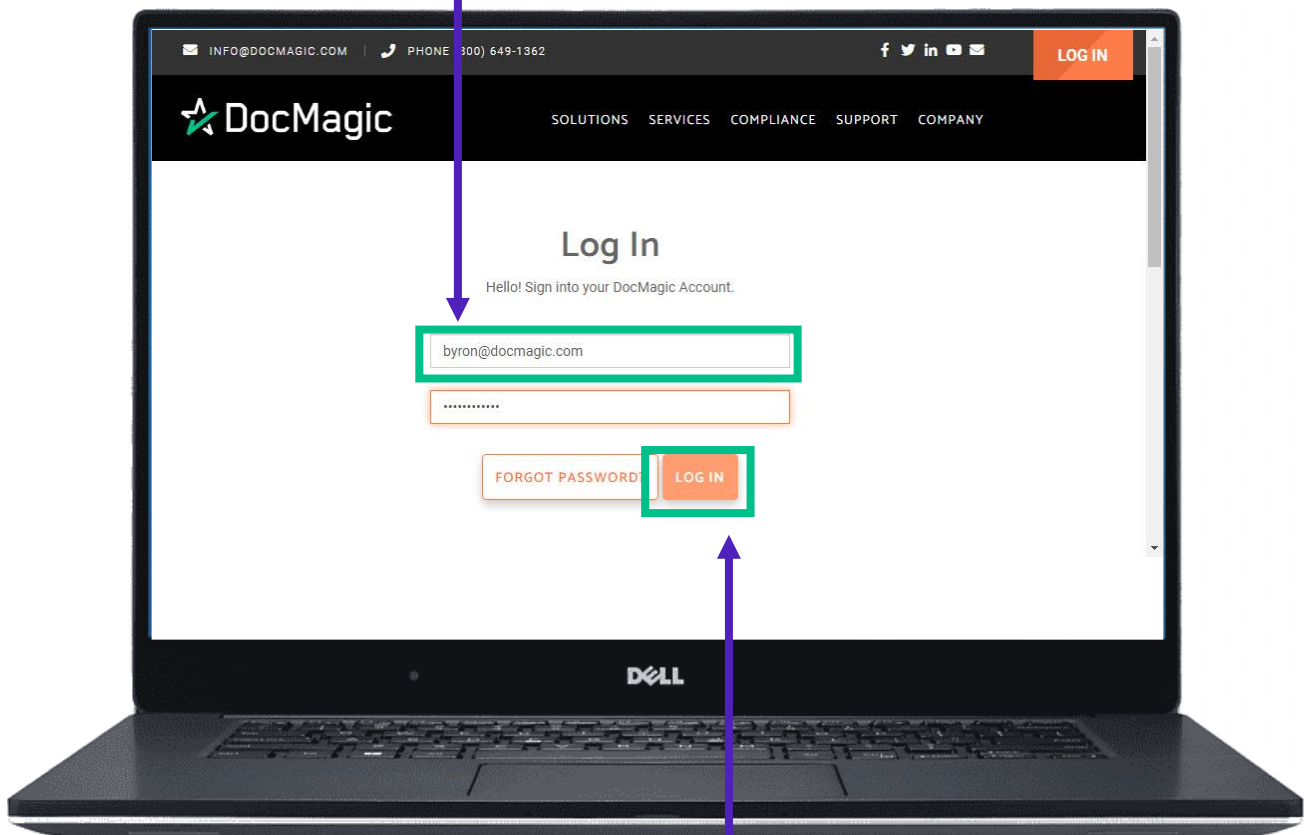
Go to [www.docmagic.com](https://www.docmagic.com)



# Report Manager

## Navigating to Report Manager

Login with your email and password.



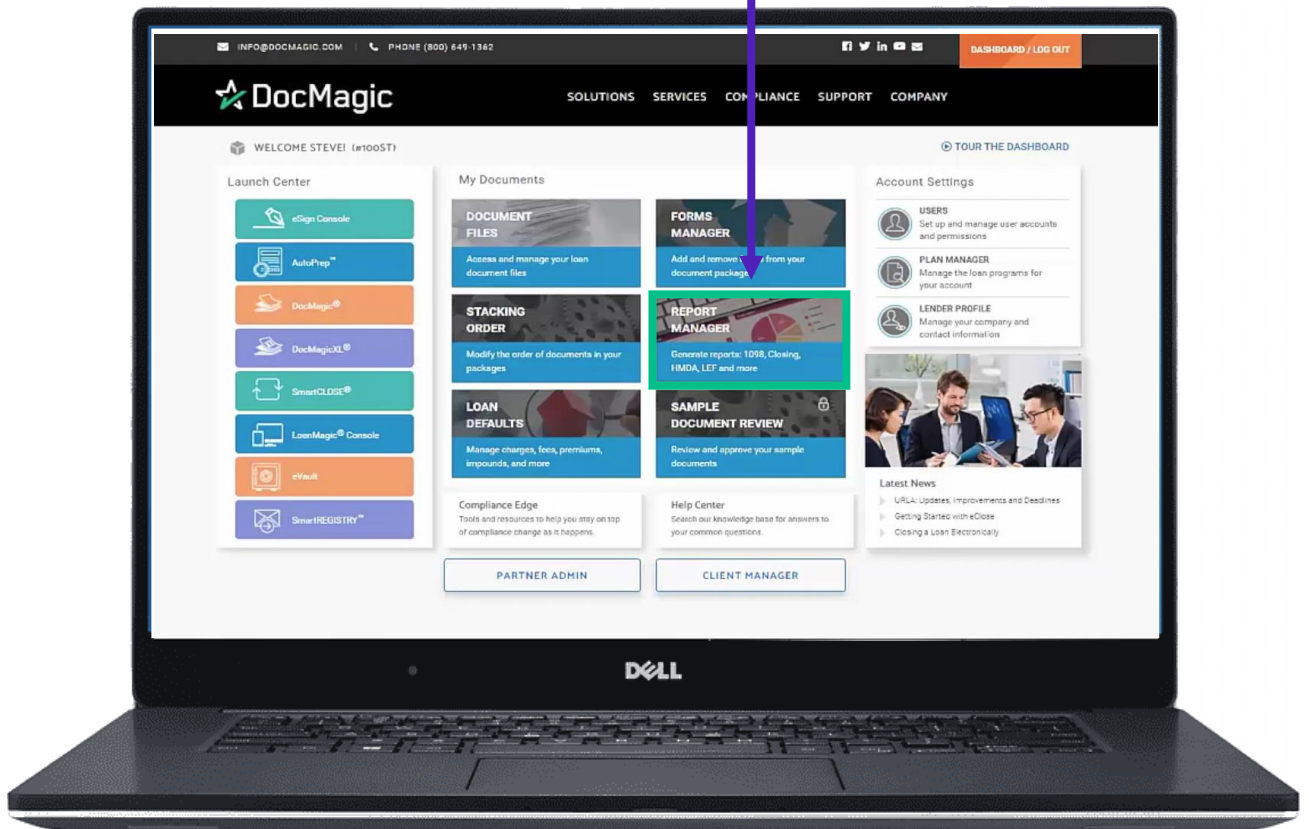
Click "LOG IN"



# Report Manager

## Navigating to Report Manager

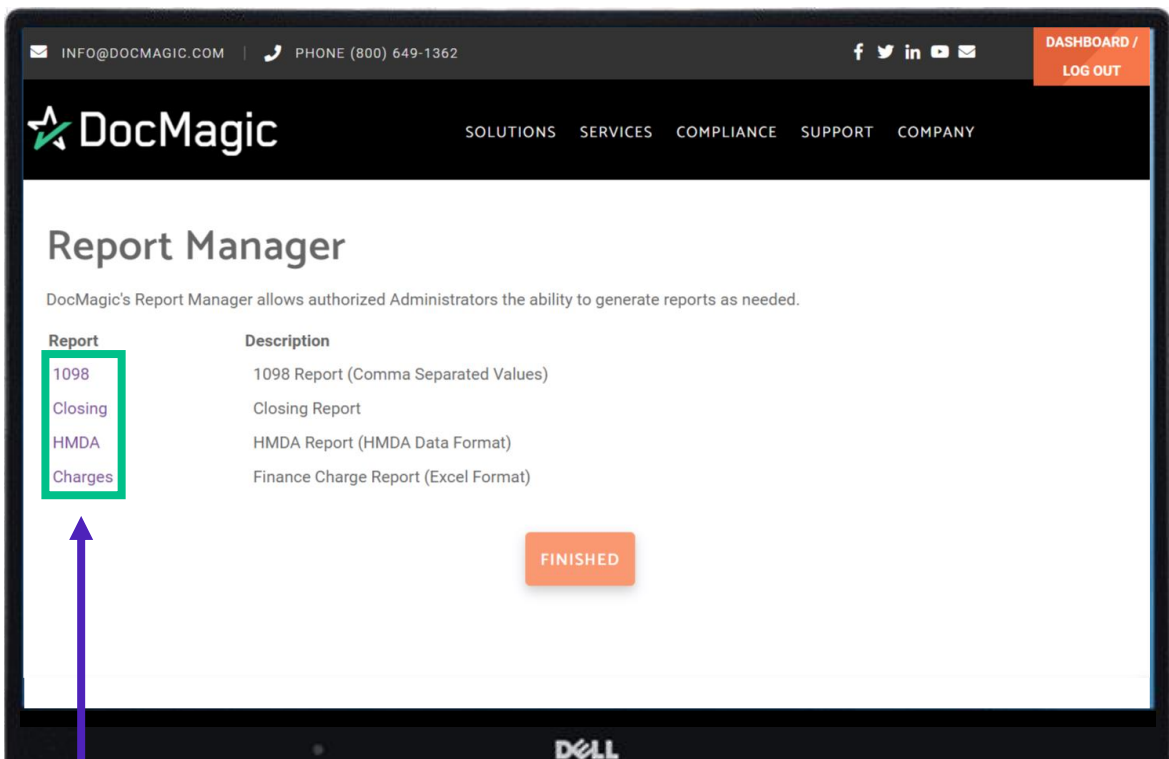
Choose Report Manager from the Dashboard



# Report Manager

Start Generating Reports

Begin generating your reports by selecting 1098, Closing, HMDA, or Finance Charge report.



Select the report you want to generate by clicking on the link in the first column.



# Report Manager

1098 Reports

To generate the 1098 report, you will need to select the year in the dropdown box and the email address where you would like to receive the report.

The screenshot shows a web browser window displaying the DocMagic website. The top navigation bar includes contact information (INFO@DOCMAGIC.COM, PHONE (800) 649-1362), social media icons (Facebook, Twitter, LinkedIn, YouTube, Email), and a 'DASHBOARD / LOG OUT' button. The main content area features the DocMagic logo and a navigation menu with 'SOLUTIONS', 'SERVICES', 'COMPLIANCE', 'SUPPORT', and 'COMPANY'. Below the navigation, a message states: 'To generate a 1098 Report, select a year below and enter an email address to which the report will be sent.' The form is titled '1098 Report Information' and contains a 'Year(yyyy):' dropdown menu with '2022' selected and '2021' as an alternative option. Below this is the 'Delivery Information' section with an 'Email Address:' field containing 'struitt@docmagic.com'. At the bottom of the form are two buttons: 'BACK' and 'SUBMIT'. The Dell logo is visible at the bottom of the browser window.

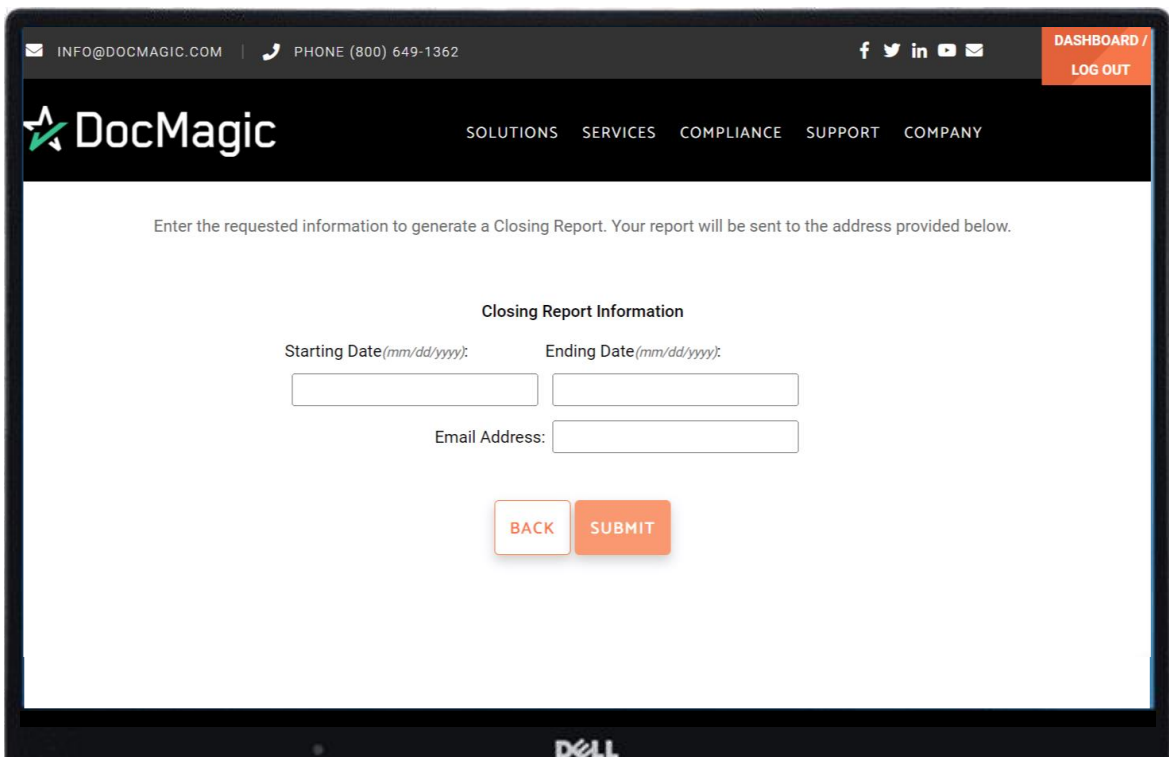
Click the "Submit" button to generate the report.



# Report Manager

## Closing Reports

To generate the Closing report, you will need to enter the date range and email address where you would like to receive the report.



The screenshot shows a web browser window displaying the DocMagic interface. At the top, there is a navigation bar with contact information: INFO@DOCMAGIC.COM and PHONE (800) 649-1362. Social media icons for Facebook, Twitter, LinkedIn, YouTube, and Email are also present. A 'DASHBOARD / LOG OUT' link is visible in the top right corner. The main content area features the DocMagic logo and a navigation menu with links for SOLUTIONS, SERVICES, COMPLIANCE, SUPPORT, and COMPANY. Below the navigation, a message states: 'Enter the requested information to generate a Closing Report. Your report will be sent to the address provided below.' The form is titled 'Closing Report Information' and contains three input fields: 'Starting Date(mm/dd/yyyy):', 'Ending Date(mm/dd/yyyy):', and 'Email Address:'. Below the form are two buttons: 'BACK' and 'SUBMIT'. The Dell logo is visible at the bottom of the browser window.

Click the "Submit" button to generate the report.



# Report Manager

## HMDA Reports

To generate the HMDA report, select a year and enter the email address you would like to receive the report.

To generate a HMDA Report, select a year below and enter an email address to which the report will be sent.

**Respondent Information**

Respondent-ID:

Agency Code:  ▼

Activity Year:  ▼

Tax-ID(XX-XXXXXXX):

**Respondent Mailing Address**

Name:

Address:

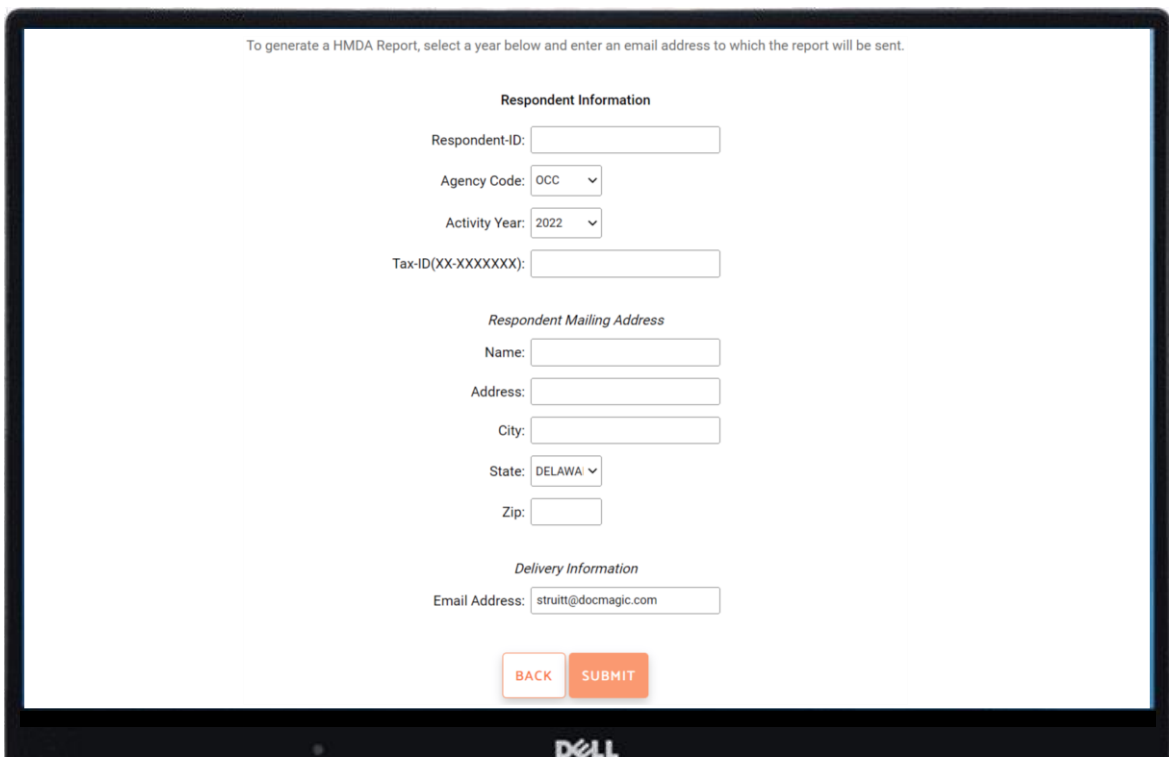
City:

State:  ▼

Zip:

**Delivery Information**

Email Address:



Click the "Submit" button to generate the report.

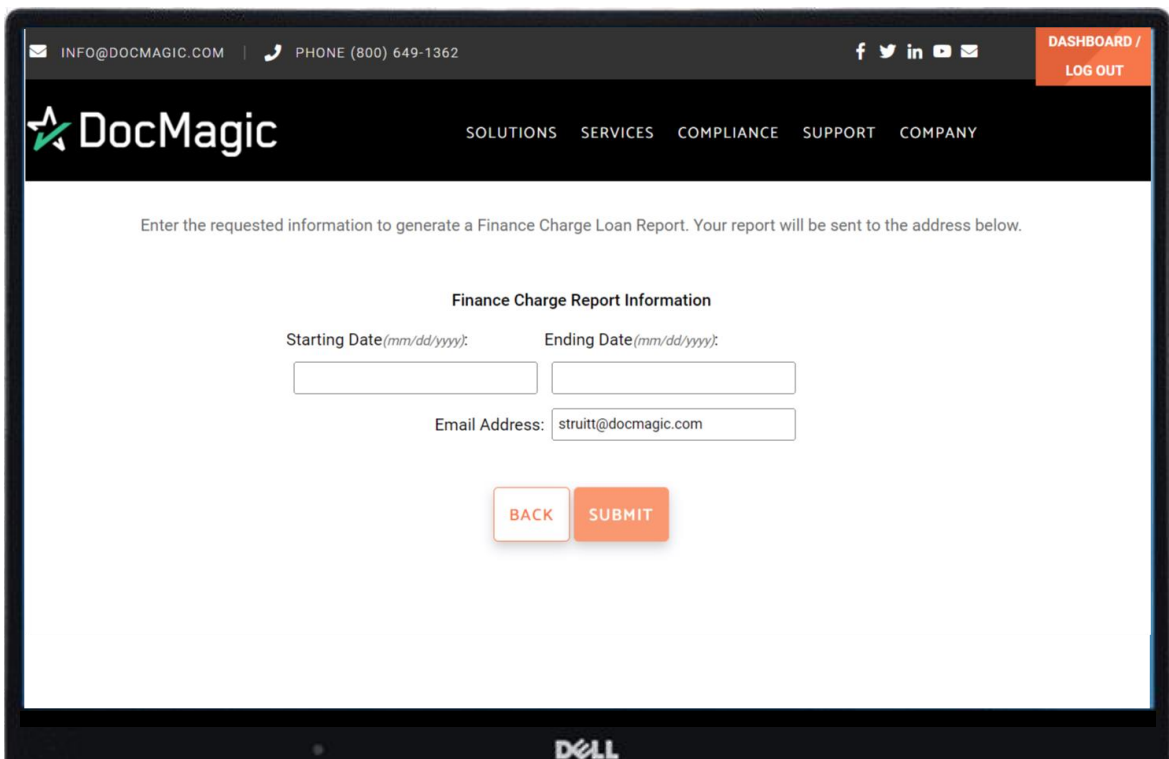




# Report Manager

## Finance Charge Loan Report

Enter the requested information to generate a Finance Charge Loan Report.



The screenshot shows a web browser window displaying the DocMagic website. The page title is "Finance Charge Report Information". The form contains the following fields and buttons:

- Starting Date(mm/dd/yyyy):
- Ending Date(mm/dd/yyyy):
- Email Address:
- BACK button
- SUBMIT button

The page also features a navigation menu with links for SOLUTIONS, SERVICES, COMPLIANCE, SUPPORT, and COMPANY. The top right corner has a DASHBOARD / LOG OUT button. The bottom of the browser window shows the DELL logo.

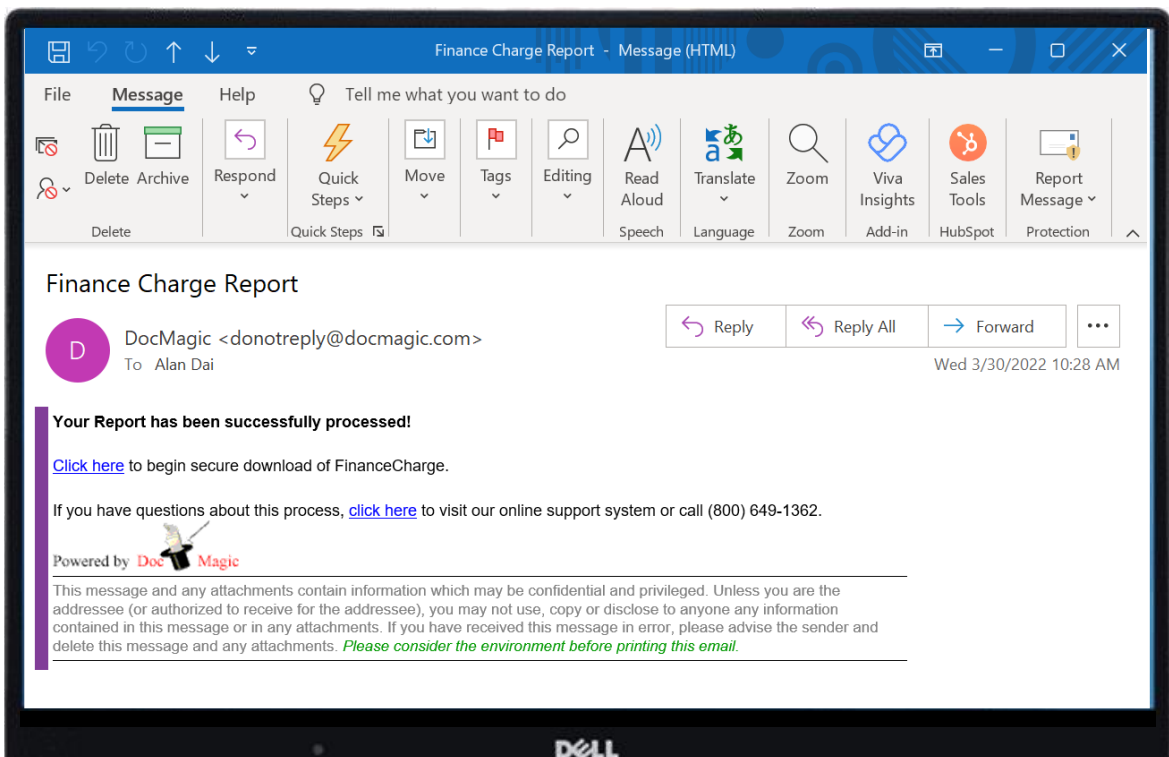
Your report will be sent to the email address entered.



# Report Manager

Email

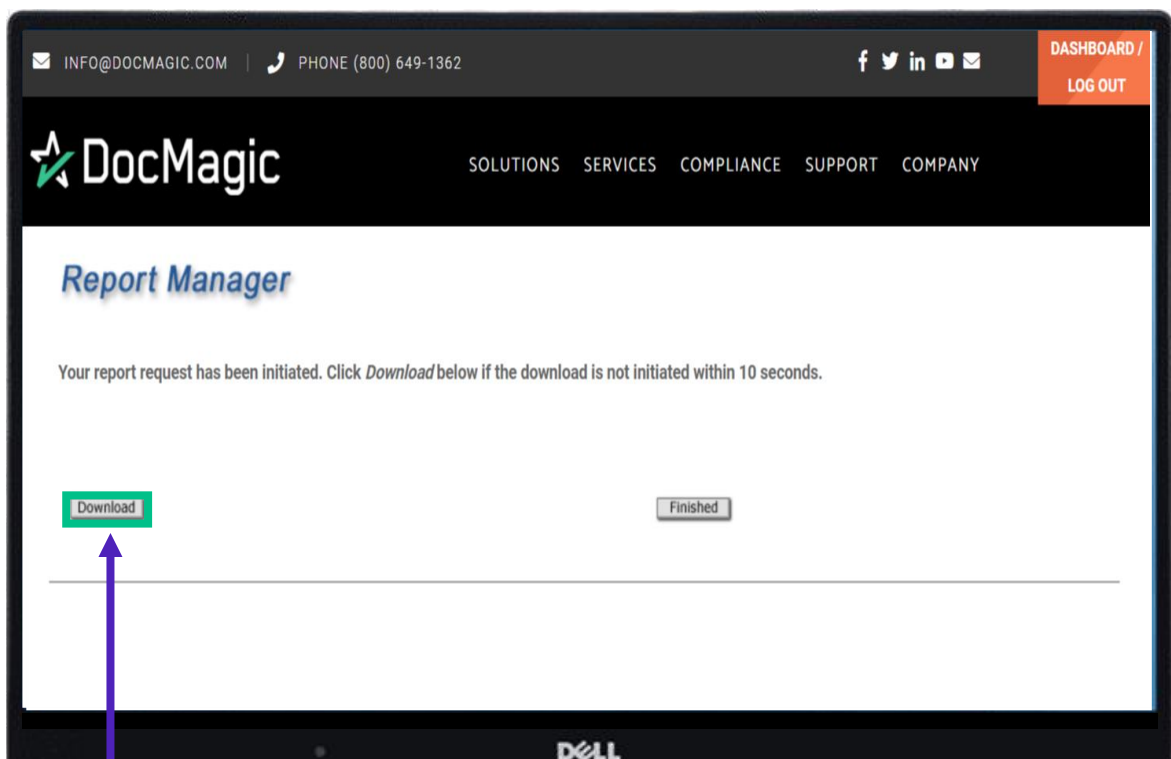
When your report is ready, you will receive an email similar to the one below.



# Report Manager

Website

The link in the email will take you to DocMagic's website. You may be asked to provide your credentials before being re-directed to this page.



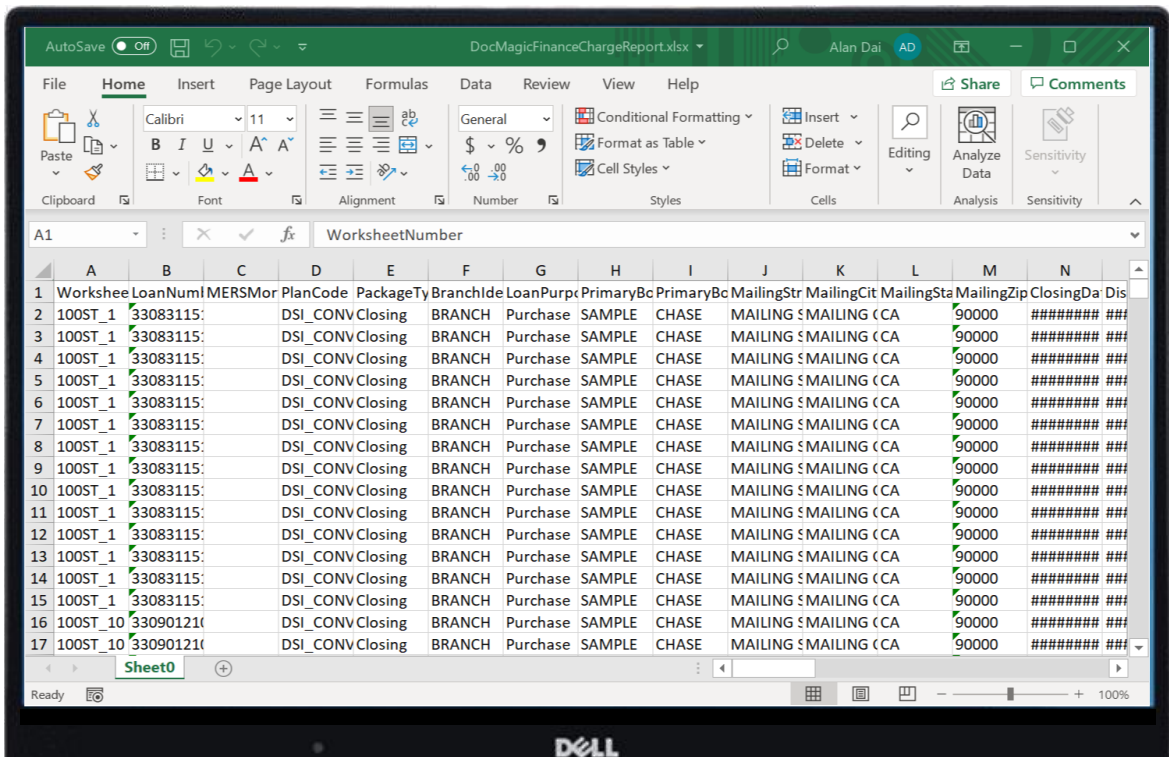
Click download if it does not happen automatically.



# Report Manager

## CSV Report

The report is generated as CSV. You may have to adjust formatting to reveal all the data.



The screenshot displays an Excel spreadsheet titled "DocMagicFinanceChargeReport.xlsx". The ribbon includes File, Home, Insert, Page Layout, Formulas, Data, Review, View, and Help. The active sheet is "WorksheetNumber". The data table has the following columns: A (Workshee), B (LoanNum), C (MERSMor), D (PlanCode), E (PackageTy), F (BranchIde), G (LoanPurp), H (PrimaryBc), I (PrimaryBc), J (MailingStr), K (MailingCit), L (MailingSta), M (MailingZip), N (ClosingDa), and O (Dis). The data rows (2-17) show a repeating pattern of loan information, with columns J through M containing values like "MAILING", "CA", and "90000".

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	
1	Workshee	LoanNum	MERSMor	PlanCode	PackageTy	BranchIde	LoanPurp	PrimaryBc	PrimaryBc	MailingStr	MailingCit	MailingSta	MailingZip	ClosingDa	Dis
2	100ST_1	33083115		DSI_CONV	Closing	BRANCH	Purchase	SAMPLE	CHASE	MAILING	CA	90000	#####	###	
3	100ST_1	33083115		DSI_CONV	Closing	BRANCH	Purchase	SAMPLE	CHASE	MAILING	CA	90000	#####	###	
4	100ST_1	33083115		DSI_CONV	Closing	BRANCH	Purchase	SAMPLE	CHASE	MAILING	CA	90000	#####	###	
5	100ST_1	33083115		DSI_CONV	Closing	BRANCH	Purchase	SAMPLE	CHASE	MAILING	CA	90000	#####	###	
6	100ST_1	33083115		DSI_CONV	Closing	BRANCH	Purchase	SAMPLE	CHASE	MAILING	CA	90000	#####	###	
7	100ST_1	33083115		DSI_CONV	Closing	BRANCH	Purchase	SAMPLE	CHASE	MAILING	CA	90000	#####	###	
8	100ST_1	33083115		DSI_CONV	Closing	BRANCH	Purchase	SAMPLE	CHASE	MAILING	CA	90000	#####	###	
9	100ST_1	33083115		DSI_CONV	Closing	BRANCH	Purchase	SAMPLE	CHASE	MAILING	CA	90000	#####	###	
10	100ST_1	33083115		DSI_CONV	Closing	BRANCH	Purchase	SAMPLE	CHASE	MAILING	CA	90000	#####	###	
11	100ST_1	33083115		DSI_CONV	Closing	BRANCH	Purchase	SAMPLE	CHASE	MAILING	CA	90000	#####	###	
12	100ST_1	33083115		DSI_CONV	Closing	BRANCH	Purchase	SAMPLE	CHASE	MAILING	CA	90000	#####	###	
13	100ST_1	33083115		DSI_CONV	Closing	BRANCH	Purchase	SAMPLE	CHASE	MAILING	CA	90000	#####	###	
14	100ST_1	33083115		DSI_CONV	Closing	BRANCH	Purchase	SAMPLE	CHASE	MAILING	CA	90000	#####	###	
15	100ST_1	33083115		DSI_CONV	Closing	BRANCH	Purchase	SAMPLE	CHASE	MAILING	CA	90000	#####	###	
16	100ST_10	33090121		DSI_CONV	Closing	BRANCH	Purchase	SAMPLE	CHASE	MAILING	CA	90000	#####	###	
17	100ST_10	33090121		DSI_CONV	Closing	BRANCH	Purchase	SAMPLE	CHASE	MAILING	CA	90000	#####	###	

