

Integra DestinyLOS

DocMagic Direct Interface

Version 1.0



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This document provides information regarding clients using Integra's Destiny platform.

1. Background

1.1. Interface

- ❑ DocMagic Direct

1.2. Account

- ❑ Before utilizing this interface, the client must have an account with DSI.

1.3. Plan Management

- ❑ All plan management is performed through DSI's Account Administration system

2. Setting up the DocMagic Interface

The DocMagic Direct Interface is provided through a Scheme file – DocMagic.scm. Also, Destiny has several environment variables that control the DocMagic Behavior.

Here are the screens to setup the Destiny/DocMagic interface. There are only a few steps that need to be taken before loan documents can be generated:

2.1. Lender Setup

In the Rolodex of Destiny, the Originating Lender is accessed and under the More Info button, the DocMagic ID is entered in the upper right corner (this is the DSI CustomerID).

The screenshot shows a software window titled "Rolodex Additional Info" with three tabs: "Additional Info", "AUS Info", and "Licensing". The "Licensing" tab is selected, and the "DocMagic ID" field is circled in red. The form contains the following fields:

- Additional Info: EDI Interchange ID (111111), EDI Application Code (222222), Credit Company Billing Account Number (Standfacts), HMDA Respondent ID, Reference Num., Regulatory Agency (DCC), Purchaser Type (Loan was not originated or was not sold in calendar), Tax-ID (HMDA-Report), Five character alpha/numeric Transmitter Control Code (TCC) assigned by IRS, Security Instruments Miscellaneous, Licensed Mortgage Broker Under (name of law), Legal Entity, Licensed under the laws of, This Entity is federally regulated under the laws of the USA.
- AUS Info: Associated Account Number (F800INT), Vendor ID Number (3333333).
- Licensing: DocMagic ID (circled in red), MERS Information (Reference Number, Identity (none)), Mortgage Insurer (MI) Code (none), NAIC #, Financial Rating, Acct. Rating, Release Date.

Buttons for "OK" and "Cancel" are located at the bottom right of the dialog.

2.2. User Setup

First, the User Setup is entered on the Destiny User Security Setup screen. The email address and DocMagic password are maintained for each user.

User Security Setup

Login Name: a Password: ***** DocMagic Password: []

Name

First Name: Tim Middle Name: []

Last Name: Bartek Suffix Name: []

E-Mail Address: [] E-Mail Host: []

Database Information

Data Source Name: Destiny 9.7

Login Name: sa Password: []

DataSync Group: (none)

Available Groups:

- Closers
- Loan Officers
- Management
- New Loan Setup
- Post Closer
- Processors
- Quality Control
- Secondary Marketing
- Senior Underwriter
- System Administrator
- Telemarketing
- Underwriter

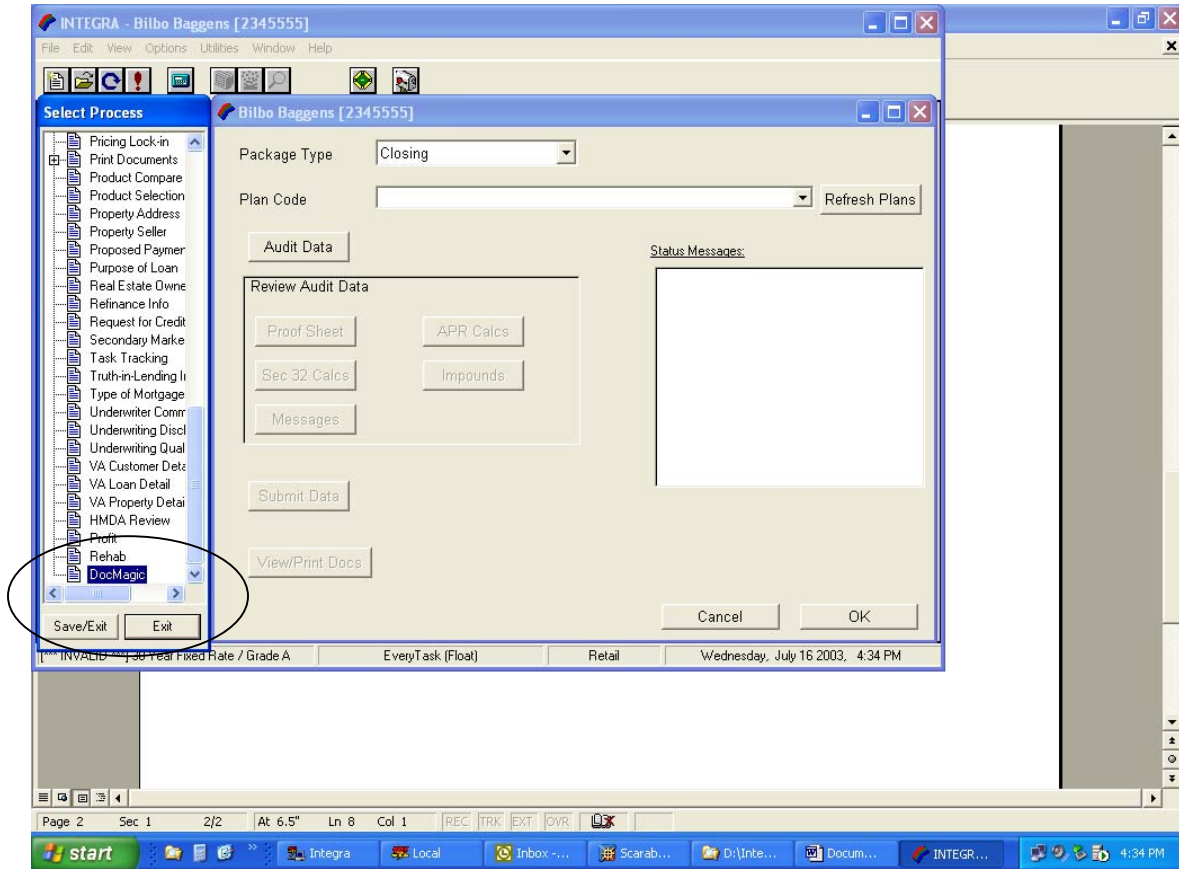
Groups this User is a member of:

Supervisor Mode Active

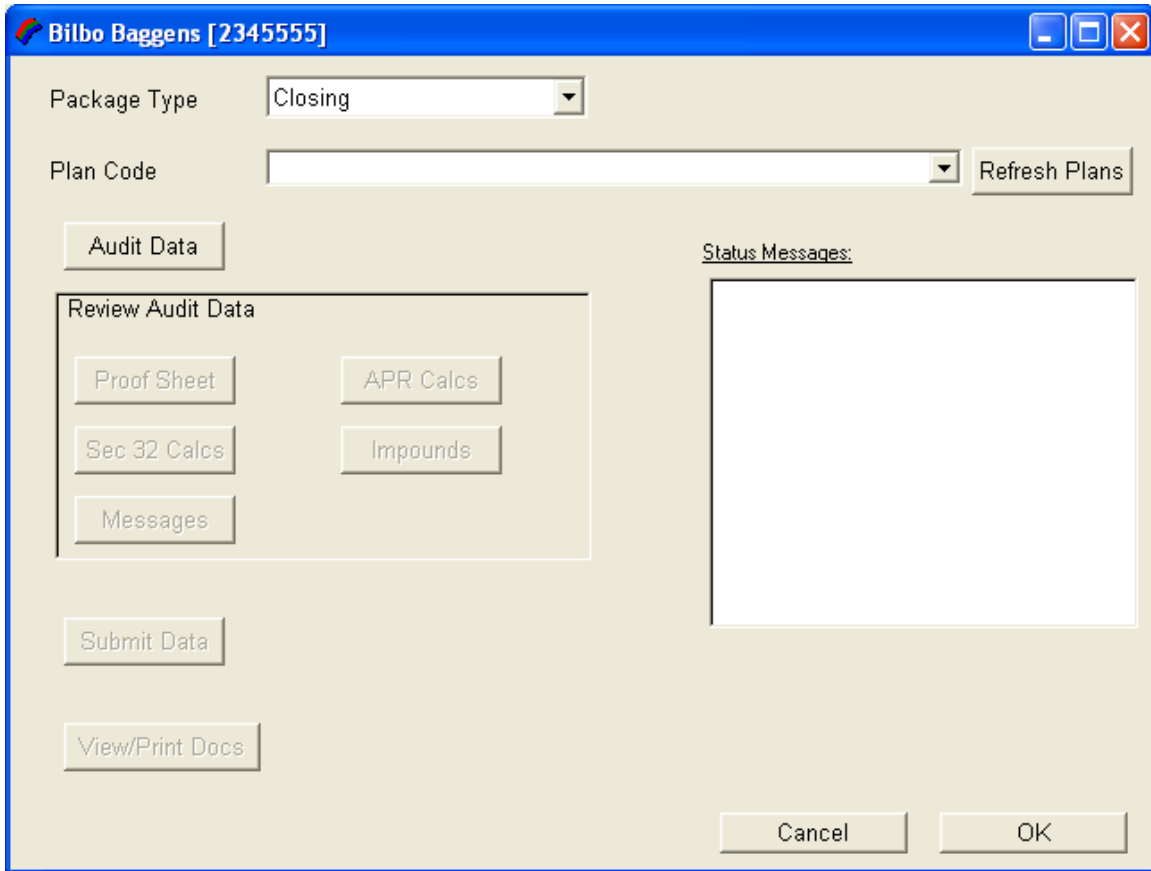
Cancel OK

3. Accessing DocMagic Services

At the loan level in the Destiny program, there is a task called DocMagic.



The DocMagic task's screen looks like this:



Here a user selects the Package Type and Plan Code. Then they can audit, review messages, submit, view and print documents.

The reviewing of audit data simply opens a web browser to display the information (Proof Sheet, APR Calcs, Section 32 Calcs, Impound Analysis, other Messages).

Documents and Audit Data are stored under the Integra directory in a DocMagic subdirectory.

Use the *Refresh Plans* button to update the Plan Code combo box values after making any changes via DSI's website (see pages 3 and 4 above).

4. Document Formats

Two document formats are supported:

A) The viewing of documents is done through the DocMagic blockument viewer: DocMaster, which can be downloaded from DSI's website here:

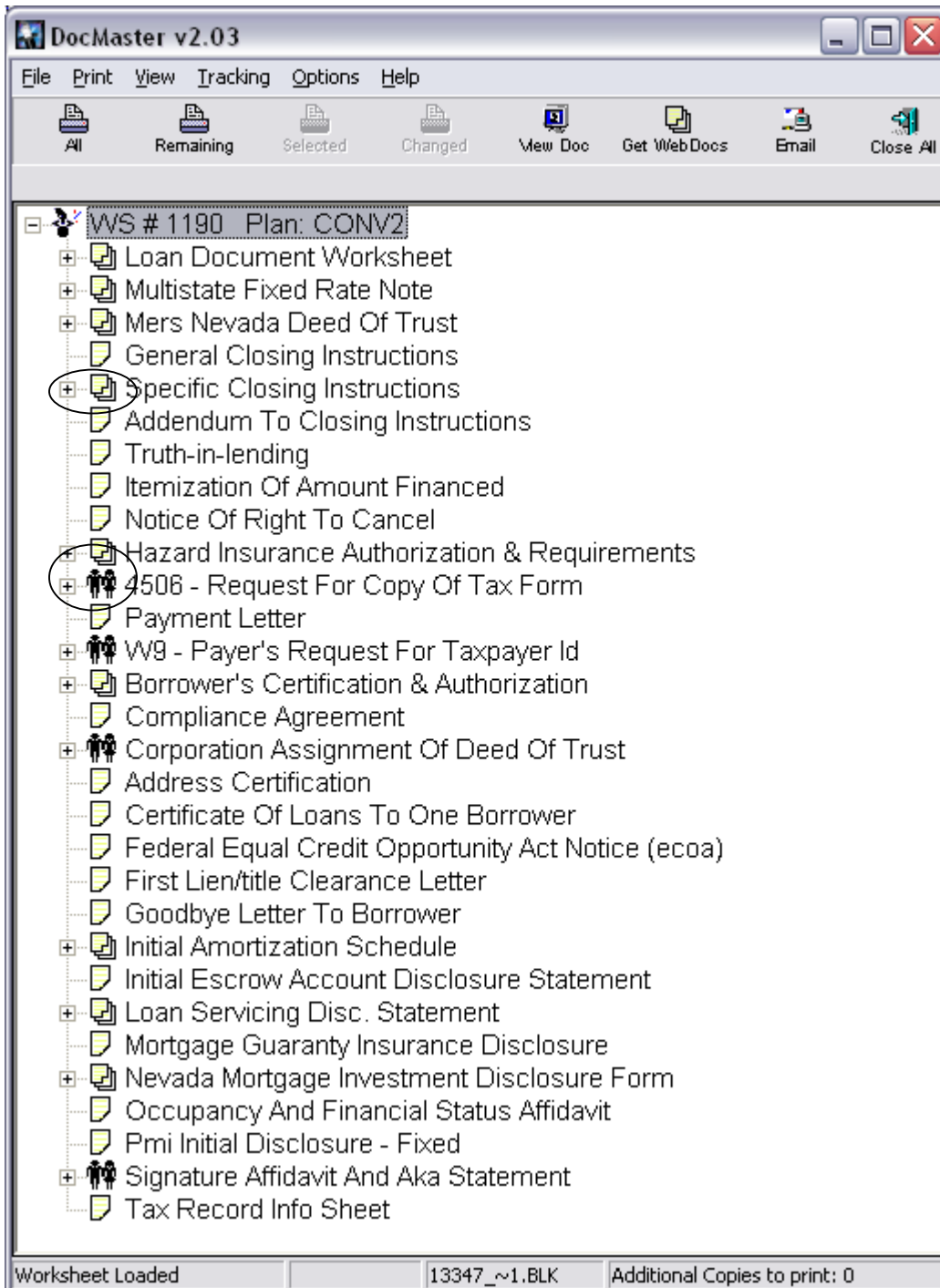
<http://www.docmagic.com/download/docmaster.jsp>

Installing it will register it as the default application to run when opening .blk files, so the *View/Print Docs* button will automatically bring up the list of documents.

B) Adobe Acrobat Reader (version 6 or higher) can be used to view and print the documents if their PDF format is preferred. Note this will result in all pages of all documents (legal and letter) to be part of the same PDF file.

The *View/Print Docs* button will load DSI's DocMaster program or Adobe's Acrobat Reader. DocMaster will display the documents that are part of the package requested in a tree (see below). Simply drill down into each document to access individual pages. Documents with the Man/Woman icon represent forms that are required for borrower and co-borrower separately.

Buttons are provided for viewing, printing and emailing the documents:



4.1. Defining Stacking Order

Users can also define the stacking order by dragging and dropping the document icon to another location on the list, then selecting: *Save Plan Code Order* from the *File* menu. Once all plans have been adjusted, they can be distributed to other users/servers by copying the file: *PlanCode.ord* to DocMaster's install directory (e.g. *C:\Program Files\Document Systems Inc\DocMaster*).