

Metavante Loan Origination Studio

DocMagic Interface Guide

Version 1.0



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Revision History

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This document provides information regarding clients using Metavante's *Loan Origination Studio* platform.

1. Background

1.1. Interface

- ❑ Seamless DocMagic Direct integration.

1.2. Account

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

1.3. Plan Management

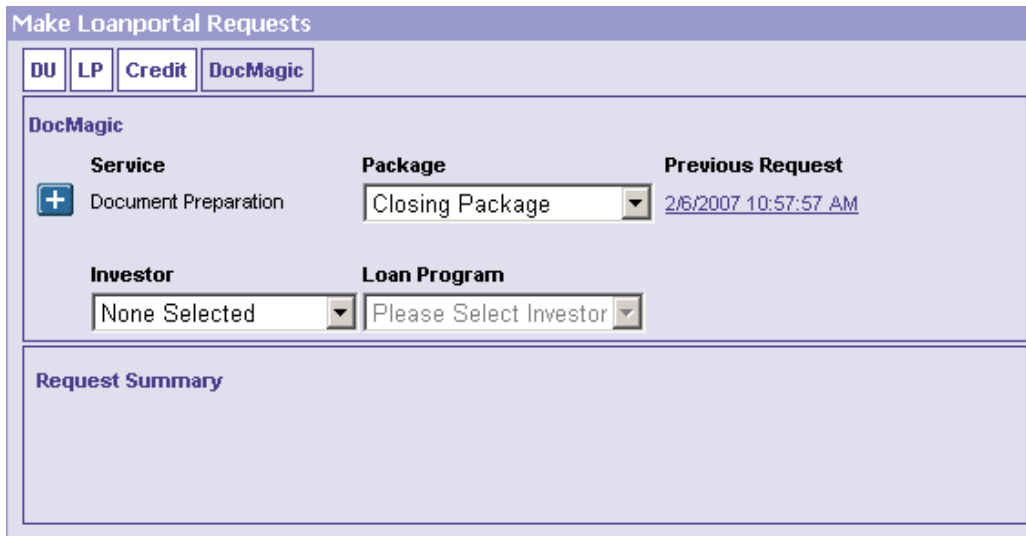
- ❑ Plan management is performed through DSI's Account Administration system

2. Accessing DocMagic Services

2.1. Making a DocMagic Request


To make a DocMagic request through Loanportal:


1. Access the Loanportal screens (Pipeline/Process/)
2. Select the **Make Loanportal Requests** screen.
3. Click the **DocMagic** tab.




The screenshot shows a web interface titled "Make Loanportal Requests". At the top, there are four tabs: "DU", "LP", "Credit", and "DocMagic", with "DocMagic" being the active tab. Below the tabs, the "DocMagic" section contains several fields: "Service" with a plus icon and "Document Preparation"; "Package" with a dropdown menu showing "Closing Package"; "Previous Request" with a text link "2/6/2007 10:57:57 AM"; "Investor" with a dropdown menu showing "None Selected"; and "Loan Program" with a dropdown menu showing "Please Select Investor". Below these fields is a section titled "Request Summary" which is currently empty.

Figure 2-1

 **Note:** If a previous DocMagic request has been made for the current loan, a text link (time/date stamp) will appear below the Previous Requests label. Click the text to view the previous request information.

4. Specify the DocMagic request options (Package, Investor, Loan Program), using available menu choices.
5. On the DocMagic tab, *Add* a new Loanportal Request ().

 **Note:** You must select an Investor and Loan Product option before making a request; otherwise, an error message appears.

Make Loanportal Requests

DU LP Credit **DocMagic**

DocMagic

Service **Package** **Previous Request**

+ Document Preparation Closing Package 2/6/2007 10:57:57 AM

Investor **Loan Program**

DSI - Generic 203K - FHA 203K

Request Summary

Service **Vendor** **Target**

- Document Preparation DocMagic Loan

Make Requests

Figure 2-2

6. Review and verify the Request Summary information at bottom of screen.
7. Click Make Requests to send your request through Loanportal. The following verification message appears.

Make Loanportal Requests?

Are you sure you would like to make the 1 Loanportal request(s) listed in the Request Summary section?

Yes No

8. Click **Yes** to send the request through Loanportal to DocMagic for processing.

2.2. *Reviewing DocMagic Responses*

To review and monitor the status of DocMagic Responses:

1. Select the **View/Print Loanportal Responses** screen.
2. Review the **Service Orders – View Responses** for DocMagic.



Figure 2-3

3. Click the linked documents in the **Response Files** section to view the results from DocMagic.

2.2.1. Closing.PDF

This is the link to the generated documents.

2.2.2. Audit.HTML

DocMagic's Goof-Proof Audit system instantly analyzes all loan-specific data for accuracy. With over 500 standard data validation and loan type-specific audits and unlimited potential for custom user-defined audits, DocMagic's Goof-Proof Audit system will insure that documents have all of the necessary information. DocMagic's Goof-Proof Audit system is completely customizable. Audits can be implemented on many different levels of the process. Audits on a document level can halt the processing of an individual document and report the problem to the user while audits implemented on a package level can halt the production of the entire loan document package.

Audit Results are separated into two primary categories:

Warning

These errors indicate that the information entered in the reported field differs from the information DocMagic expects to see. This audit is only to tell you that DocMagic has found something in your worksheet that is not normal and will not prevent you from processing.

Fatal

Fatal errors stop processing until the problem is remedied. These errors **MUST** be corrected before DocMagic will allow you to continue to the document processing stage of the program. These errors indicate an item in the worksheet that is critical to successful loan document production.

2.2.3. Checklist.HTML

Upon successful document generation, a Document Check Sheet (Checklist.HTML) is returned.

Check Sheet for WebSheet # 1201

Loan # 200708010001

DOCUMENT SYSTEMS, INC. (M
20501 S. AVALON BLVD. SU
CARSON - TESTING THE CIT

	Qty	Check	Document Name
1)	1	[]	LOAN DOCUMENT WORKSHEET(W.S.DSI)
2)	1	[]	UNIFORM RESIDENTIAL LOAN APPLICATION(1003.LGL)
3)	1	[]	ALLONGE(A.LSR-C)
4)	1	[]	INTEREST FIRST ADJUSTABLE RATE NOTE(US3534.NOT)
5)	1	[]	MARYLAND PURCHASE MONEY DEED OF TRUST MERS(3021MD.MZD)
6)	1	[]	MULTISTATE 1-4 FAMILY RIDER(US3170.RID)
7)	1	[]	MULTISTATE ARM RIDER, 1YR T-BILL(US3182.RID)
8)	1	[]	ADJUSTABLE RATE DISCLOSURE - INTEREST ONLY(ARMIO.DSC)
9)	1	[]	HUD-1 SETTLEMENT STATEMENT(HUD1SS.MSC)
10)	1	[]	HUD 1 CERTIFICATION ADDENDUM(CA.LSR)
11)	1	[]	GENERAL CLOSING INSTRUCTIONS(GCI.MSC)
12)	1	[]	SPECIFIC CLOSING INSTRUCTIONS(SCI.MSC)
13)	1	[]	ADDENDUM TO CLOSING INSTRUCTIONS(ATCI.MSC)
14)	1	[]	TRUTH-IN-LENDING(REGZ4.LSR)
15)	1	[]	ITEMIZATION OF AMOUNT FINANCED(GF3.LSR)
16)	1	[]	BORROWERS CERTIFICATION & AUTHORIZATION(TDC.LSR)
17)	1	[]	HAZARD INSURANCE AUTHORIZATION & REQUIREMENTS(HAZARD8.LSR)
18)	1	[]	4506 - REQUEST FOR COPY OF TAX 507 (MSC-MSM2)
		[]	4506T - REQUEST FOR TRANSFER OF TAX 507 (MSC-MSM2)

Figure 2-4

3. Company Information

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3.1. Product Information

“Loan Origination Studio is a comprehensive, end-to-end residential mortgage system that provides business process workflow, services ordering and the movement of data and documents from the point-of-sale through to loan closing.”