FICS Loan Producer
DocMagic Interface Guide
Version 1.0

Revision History

2007-05-11	❑ Initial Revision

Table of Contents

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

The interface requires client-side files provided by FICS. Once obtained, install the LPSP0039.PBD file into the FICS root directory; then copy the base64.dll file either into the Windows/System32 directory. After copying the base64.dll file click on start/run and enter regsvr32 base64.dll; then click "OK" to register this dll file.

2.1. Making a DocMagic Request

To access the interface:

1. In Loan Producer, Click on **Tools** then **Run Customized Programs**. At the Customized Programs window choose the **Doc Magic Direct Interface Program** and click **OK**.

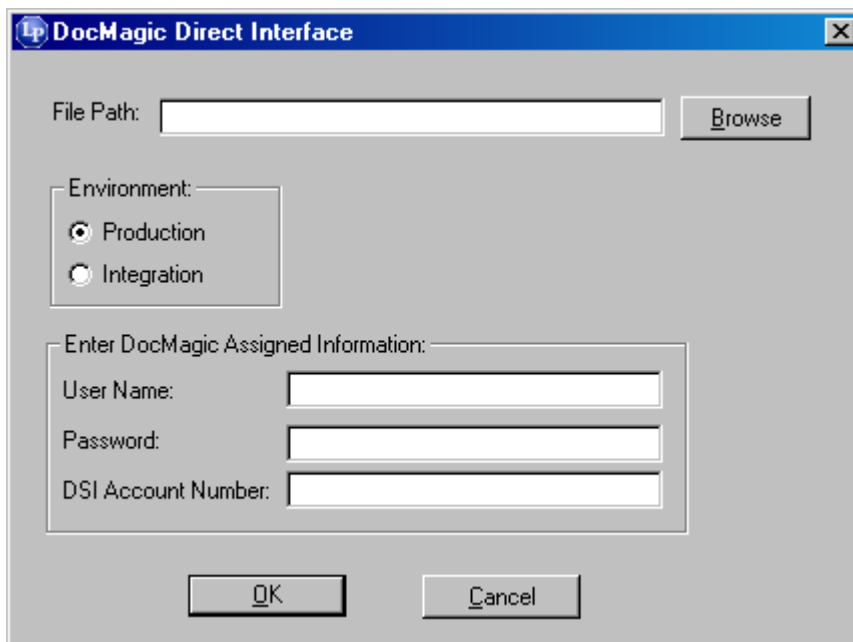2. The DocMagic® Interface window for the user sign in opens:

Figure 2-1

- **File Path:** Either enter the path or click the "Browse" button to designate the location where the DSI request files will be written.

Environment
- **Production:** Choosing Production will send your request to a live environment.
- **Integration:** Choosing Integration will send your request to a test environment.

Enter DocMagic Assigned Information:
- **User Name:** This field will automatically default to the e-mail address associated with the current user from information set up in Security. This field can be manually edited to allow a user to submit a request using another individual's login.
- **Password:** Key in the password for the User Name entered.
- **DSI Account Number:** Key in your company's DSI Account Number assigned by Doc Magic.

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3. After completing the necessary fields in the DocMagic Direct Interface window, click the **OK** button.

4. The DocMagic® Interface window used for processing then opens:
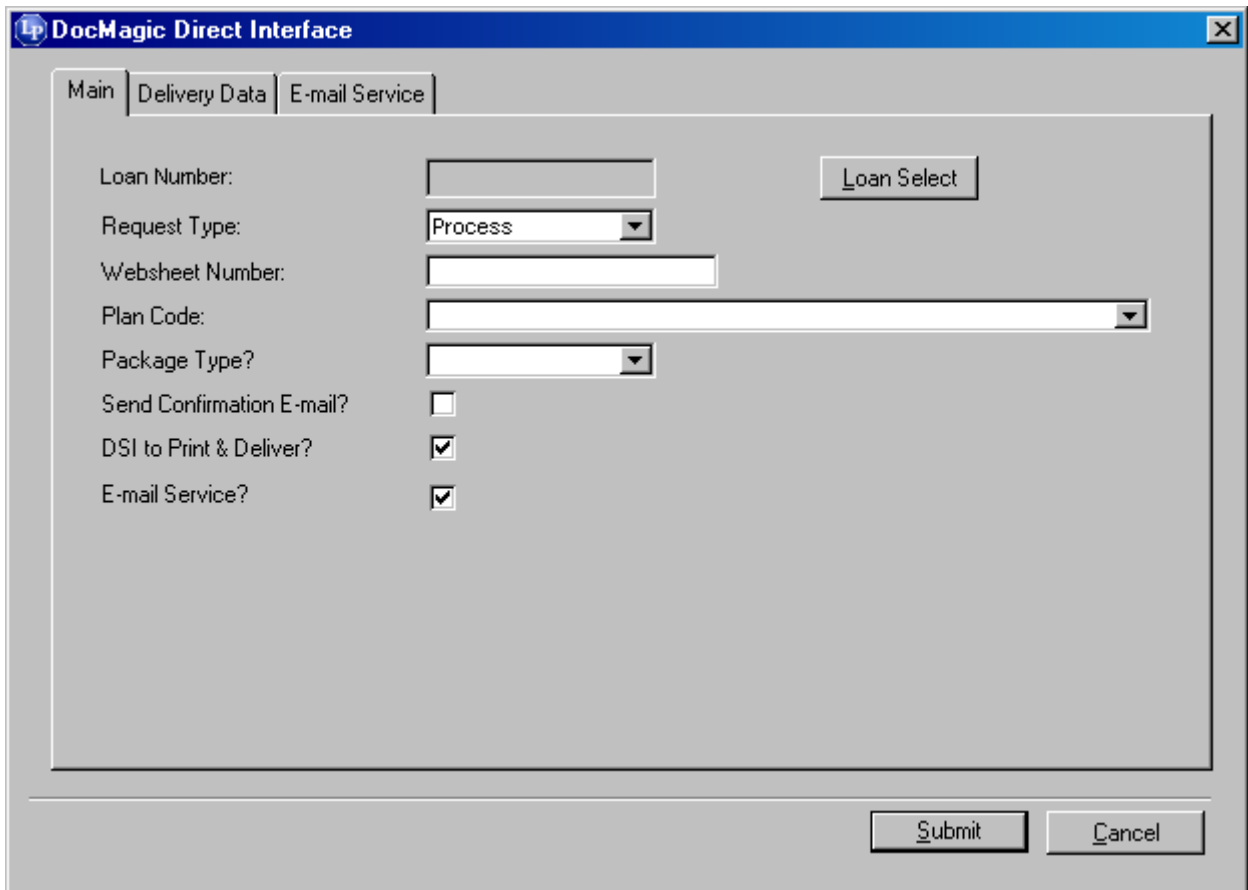

Figure 2-2

2.1.1. Main

Loan Number
If a loan is already opened in Loan Producer when the Doc Magic Interface window is accessed, the Loan Number field will already be populated. This field can be edited by clicking on the "Loan Select" button to choose another loan number.

Request Type
Choose from the drop down either "Process" or "Audit." Choosing "Process" will give you the option of choosing from different Package Types. Choosing "Audit" will only allow the Package Type of "Closing" and gray out the "Delivery Data" and "E-mail Service" tabs. The Request Type is a required field.

Websheet Number
This field will be initially left blank, but will be populated by DSI when the initial request is received. The Websheet Number is a unique number assigned by DSI to identify each loan on DSI's server.

Plan Code

Click on the drop down to view the Plan Codes available. The Plan Code is a required field.
Package Type
Click on the drop down to select the appropriate package type desired. This a required field.

Send Confirmation E-mail
Checking this box will result in the DSI server sending the user an e-mail confirming that the request was successfully processed.

DSI to Print & Deliver
Checking this box will indicate to DSI that they will be generating the documents and also printing and delivering them. When this box is checked the "Delivery Data" tab will be available.

E-mail Service
Checking this box will indicate to DSI that they will be generating the documents, and also sending e-mail notifications to the designated recipient(s). The e-mail notification sent by DSI includes a link for accessing the documents on the DocMagic web server, not as attachment of the documents. When this box is checked the "E-mail Serivce" tab will be available.

2.1.2. Delivery Data

This tab is used to convey delivery information and will only be displayed when "DSI to Print & Deliver" has been checked on the Main tab.

Figure 2-3

The Address Book Search Icon can be used to automatically populate the majority of the data on this tab with information previously entered into the Address Book.

- Attention: Enter the name of the contact for the Delivery Data.
- Name: Enter the name of the business or person.
- Street: Enter the delivery street address.
- City: Enter the delivery city.
- State: Enter the delivery state.
- Zip: Enter the delivery zip code.
- Phone: Enter the delivery phone number.
- DSI Manager Notes: Enter any notes for the delivery recipient to receive.

2.1.3. E-Mail Service

This tab is used to convey information pertaining to DSI's e-mail service and will only be displayed when "E-mail Service" has been checked on the Main tab.
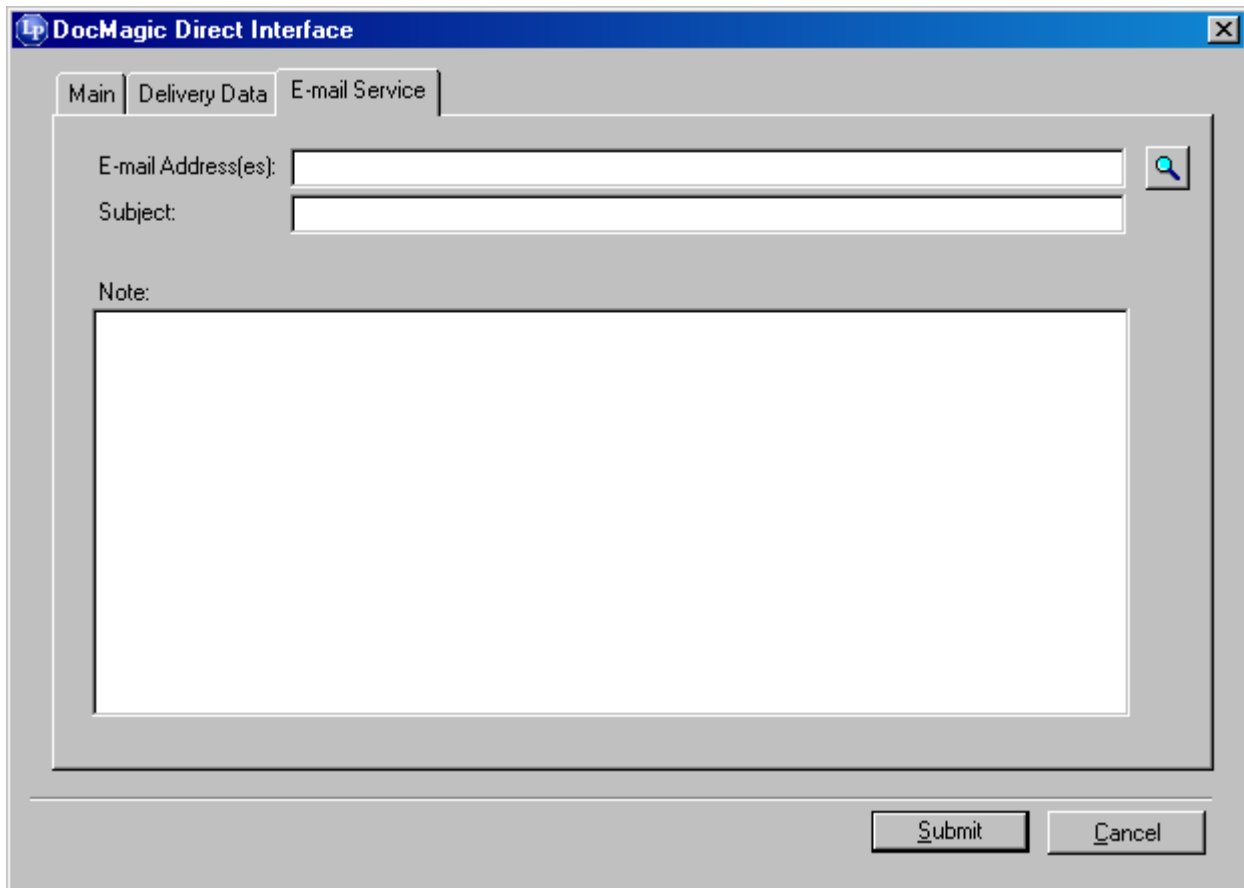
Figure 2-4

- E-mail Address(es): If the Address Book Search Icon is used to select a Business Associate from the Address Book, this field will be automatically populate the E-mail Address associated with that Business Associate.

- Subject: Enter a subject for the subject line of the email.
- Note: Enter any applicable notes

5.   After completing the necessary fields, click the **Submit** button.

6.   The DocMagic Interface results window will then appear.

2.2.   *Reviewing DocMagic Responses*
The DocMagic Response dialog contains the Audit messages returned by DocMagic. DocMagic's Goof-Proof Audit system instantly detects problems with incoming data and organizes any issues into warning and fatal error messages.
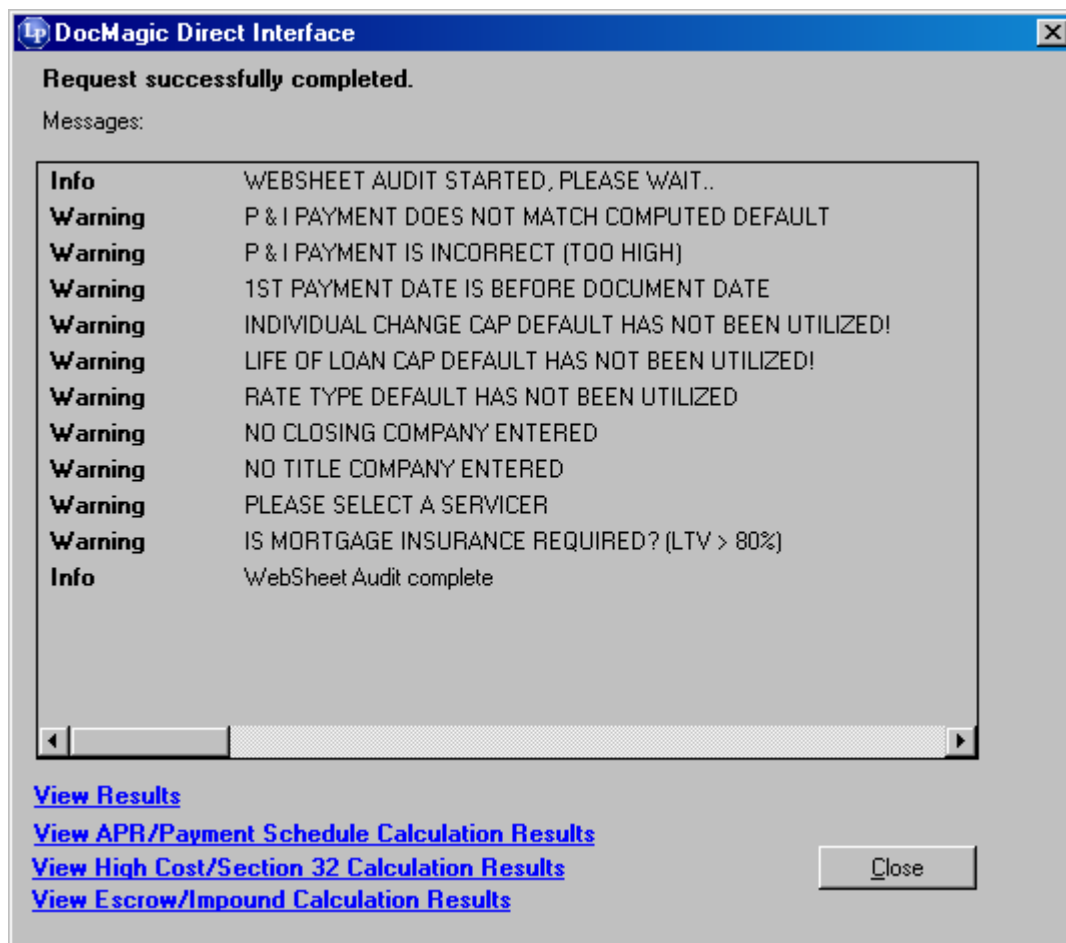

Figure 2-5

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.

Additional Audit Results
When the transaction is audited/processed, the following items are generated:

- APR/Payment Schedule
- Section 32/State High Cost/Fannie Mae Tests
- Escrow Account Analysis

View Results
For successful requests, utilize the View Results link to access the generated document set.

3. Company Information

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3.1. Product Information

"Loan Producer for Windows® is designed to save time and money in loan origination, processing, underwriting, closing, and marketing. The system is a true Windows® based 32 bit client/server system utilizing an ODBC relational database and is designed to provide all the features and functionality you require."