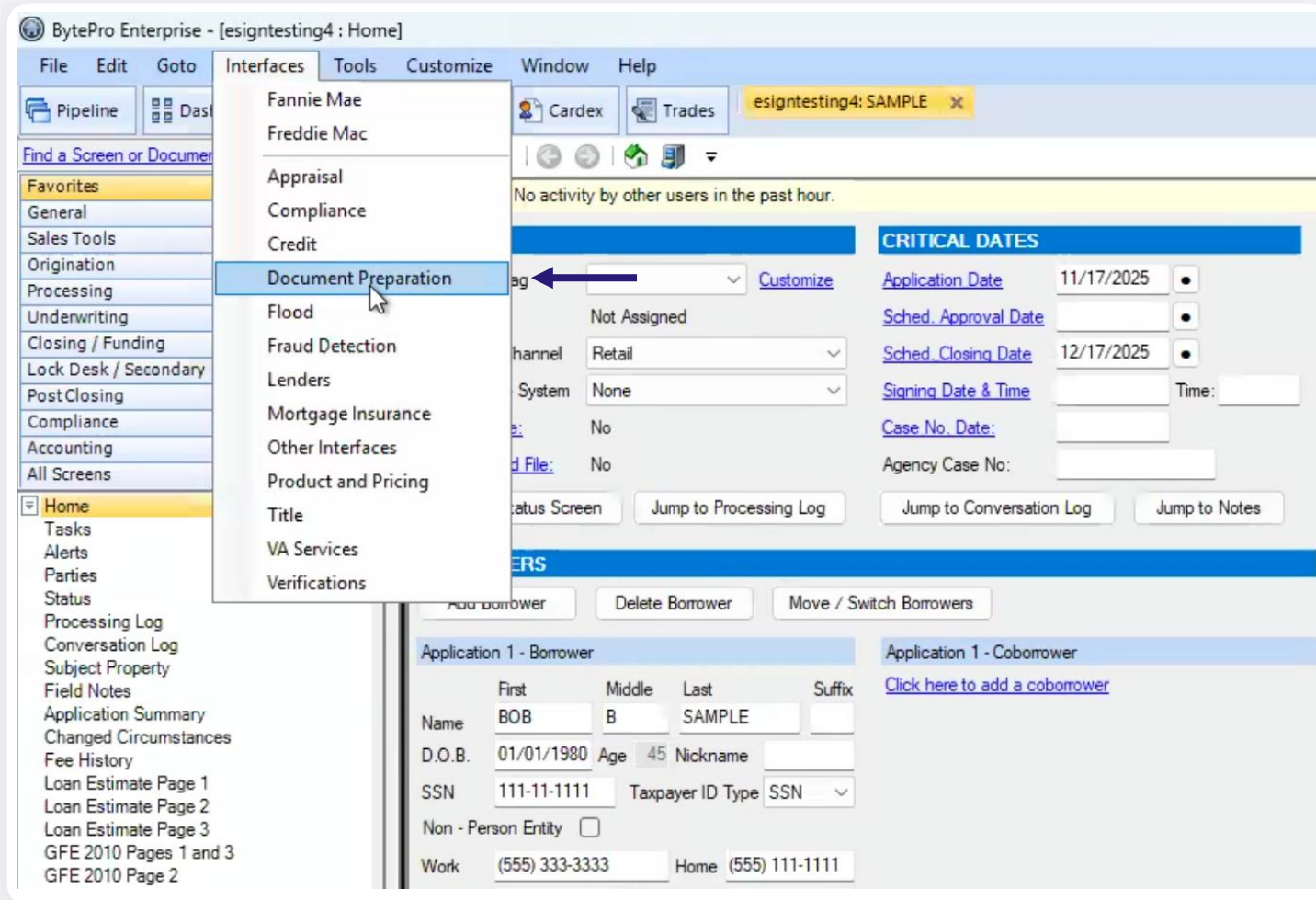


BytePro – DocMagic Integration

User Guide – 2026 Revision

Pipeline → Interfaces → Document Preparation



- Select your loan from the pipeline. Then, from the top ribbon, go to Interfaces, and select Document Preparation.

Order Information

 DocMagic

Contact Information

[DocMagic Web Site](#)
Customer Support 1-800-649-1362

Order Information

Worksheet #
Loan Plan Code
Alt Lender Code
Package Type
Method
Action
 [Defaults](#)

Loan Information

Borrower BOB B SAMPLE
Loan Number eSign-Test1
Loan Program Fixed Rate
Doc Prep Code DSI_CONV
Loan Proceeds To

Delivery Options

DocMagic eSign
Signature Enable ☐
Event Notification ☐
E-Mail Secure Link to ☐
Require Password ☐
Retrieval Notification ☐
DSI to Print and Deliver to Borrower ☐

- From the Doc Prep screen, select DocMagic as your provider.
- In the **Order Information** section:
 - The DocMagic Worksheet Number should match the Byte File Number. If necessary, you can modify it by updating the value in the **Worksheet #** field.
 - Confirm your **Loan Plan Code**, and **Alt Lender Code** if applicable. Hit Refresh to load your most recent list of options (ex. if you updated your [Plan Manager](#) on our website)

Order Information

DocMagic

Contact Information

[DocMagic Web Site](#)
Customer Support 1-800-649-1362

Loan Information

Borrower BOB B SAMPLE
Loan Number eSign-Test1
Loan Program Fixed Rate
Doc Prep Code DSI_CONV
Loan Proceeds To

Order Information

Worksheet # JessEsignTest4
Loan Plan Code DSI_CONV - ALL
Alt Lender Code
Package Type Closing Documents
Method Seamless
Action Process

Delivery Options

DocMagic eSign
Signature Enable ☐
Event Notification ☐
E-Mail Secure Link to ☐
Require Password ☐
Retrieval Notification ☐
ENotary ☐
ENote

[Defaults](#)

- Order Information section continued:
 - Select your **Package Type**. If you select Closing Documents for Package Type, your Total eClose options will appear (Enotary/Enote).
 - **Method** option will normally be set to Seamless. While some organizations may allow users to launch DocMagic Online directly, this approach is generally not recommended when the Seamless integration is available.
 - **Action:** Select whether you are Processing a package or just Auditing the file.

Auditing

Order Information

Websheet #1

Loan Plan CodeDSI_CONV - DSIRefresh

Alt Lender CodeRefresh

Package TypeClosing Documents

MethodSeamless

ActionAudit

Submit

Defaults

Loan Estimate

You are submitting a package that includes the Loan Estimate

Submit and Flag as Disclosed

Just Submit; I Am Not Disclosing

Cancel - Do Not Submit

Status Messages (double-click to view long messages)

Date	Message
5/29/25 3:35:09 PM	Fatal: Originator NMLS information missing. No NMLS ID provided for Corporate.
5/29/25 3:35:09 PM	Warning: NMLS_ID:35676 status is NOT APPROVED . There are no Federal or State Licen...
5/29/25 3:35:09 PM	Warning: NMLS License(s) are not approved. (35676 - Does Not Exist.)
5/29/25 3:35:09 PM	Warning: The Primary Borrower's Name - John S Smith, does not conform to DocMagic's Guid...
5/29/25 3:35:09 PM	Warning: This loan has a Balloon Payment feature.
5/29/25 3:35:09 PM	Warning: Intent to Proceed may not be provided before an initial Loan Estimate.
5/29/25 3:35:09 PM	Warning: Intent to service or transfer service indicator is blank.
5/29/25 3:35:09 PM	Warning: Issued Date cannot be after Closing Date
5/29/25 3:35:09 PM	Warning: Refinance loans must include payoffs.

View Messages in New Window ...

- If you would like to run an audit, select Audit as the Action, then click Submit.
- When prompted, choose *Just Submit; I Am Not Disclosing* from the window that appears.
- Any audit findings will be displayed in the Status Messages section below.
 - Warnings indicate potential issues but still allow processing to continue.
 - Fatals must be resolved before the package can be processed.

Loan Information and Delivery Options

The screenshot displays the DocMagic web interface with the following sections:

- Contact Information:** Includes a link to the DocMagic Web Site and Customer Support phone number (1-800-649-1362).
- Order Information:** Contains fields for Websheet # (JessEsign Test4), Loan Plan Code (DSI_CONV - ALL), Alt Lender Code, Package Type (Loan Estimate), Method (Seamless), and Action (Process). There are Refresh buttons for the Loan Plan Code and Alt Lender Code.
- Loan Information:** Displays Borrower (BOB B SAMPLE), Loan Number (eSign-Test 1), Loan Program (Fixed Rate), Doc Prep Code (DSI_CONV), and Loan Proceeds To (a dropdown menu with an arrow pointing to it).
- Delivery Options:** Includes a dropdown for DocMagic eSign (with an arrow pointing to it, showing options: Do Not eSign, Do Not eSign, DocMagic eSign, Point of Sale eSign), Signature Enable, Event Notification, E-Mail Secure Link to (checkbox), Require Password (checkbox), Retrieval Notification (checkbox), and DSI to Print and Deliver to Borrower (checkbox).

At the bottom, there is a Submit button and a Defaults link.

- In the **Loan Information** section:
 - **Loan Proceeds To:** Choose an entity to print on the Closing Instructions (this is often left blank, as shown on screen).
- In the **Delivery Options** section:
 - Choose your **DocMagic eSign** option. Select Point of Sale eSign if you want to notify a third party. You'll see a notification if no POS is selected on the Home Screen.

DocMagic eSign

 DocMagic

Contact Information

[DocMagic Web Site](#)
Customer Support 1-800-649-1362

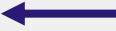
Loan Information

Borrower BOB B SAMPLE
Loan Number eSign-Test1
Loan Program Fixed Rate
Doc Prep Code DSI_CONV
Loan Proceeds To

Order Information

Worksheet #
Loan Plan Code
Alt Lender Code
Package Type
Method
Action

Delivery Options

DocMagic eSign
Signature Enable ☒
Event Notification ☒ [Select](#) 
E-Mail Secure Link to ☐
Require Password ☐
Retrieval Notification ☐
DSI to Print and Deliver to Borrower ☐

[Defaults](#)

- Delivery Options section continued:
 - If you select DocMagic eSign you will also need to check **eSignature Enable** to allow your participants to eSign the package.
 - If you want additional recipients to receive eSign event notifications, check this box and click the Select link to view your list of available recipients.

Other Delivery Options (E-mail, Print Fulfillment)

 DocMagic

Contact Information

[DocMagic Web Site](#)
Customer Support 1-800-649-1362

Order Information

Worksheet #
JessEsignTest4

Loan Plan Code
DSI_CONV - ALL

Refresh

Alt Lender Code

Refresh

Package Type
Loan Estimate

Method
Seamless

Action
Process

Loan Information

Borrower
BOB B SAMPLE

Loan Number
eSign-Test1

Loan Program
Fixed Rate

Doc Prep Code
DSI_CONV

Loan Proceeds To

Delivery Options

DocMagic eSign
DocMagic eSign

Signature Enable ☒

Event Notification ☐

E-Mail Secure Link to ☒ [Select](#)

Require Password ☒ Other

Retrieval Notification ☐

DSI to Print and Deliver to Borrower ☐

Submit

[Defaults](#)

- Delivery Options section continued:
 - If you want to e-mail your documents, select **E-Mail Secure Link** and click the **Select** link to view your list of available recipients.
 - You can require a password to access emailed documents. If enabled, choose from the available password options to determine how recipients will authenticate.
 - Finally, if you want to utilize our print fulfillment center, check the “DSI to Print and Deliver to Borrower” box.

Submission Options

The screenshot displays the DocMagic web application interface. At the top left is the DocMagic logo. The main content area is divided into three sections: 'Contact Information', 'Loan Information', and 'Order Information'. The 'Contact Information' section includes a link to the 'DocMagic Web Site' and customer support details. The 'Loan Information' section shows the borrower's name 'BOB B SAMPLE' and the loan number 'eSign-Test1'. The 'Order Information' section contains fields for 'Worksheet #', 'Loan Plan Code', 'Alt Lender Code', 'Package Type' (set to 'Loan Estimate'), 'Method' (set to 'Seamless'), and 'Action' (set to 'Process'). A blue arrow points to the 'Submit' button at the bottom left. A modal dialog titled 'Loan Estimate' is open in the center, displaying a preview of a document with the text 'Submit and Flag as Disclosed'. Below the preview are two buttons: 'Just Submit; I Am Not Disclosing' and 'Cancel - Do Not Submit'.

- Once you hit **Submit**, this window appears.
 - **Just Submit; I Am Not Disclosing** generates a watermarked preview of the documents for your review.
 - **Submit and Flag as Disclosed** generates the package and marks the transaction as disclosed. If eSign was enabled in the Delivery Options section, the package will also be sent to the designated recipients for electronic signature.

This Option Does Not Retain Loan Data or Documents

Order Information

Worksheet #: JessEsignTest4
Loan Plan Code: DSI_CONV - ALL
Alt Lender Code: [Dropdown]
Package Type: Loan Estimate
Method: Seamless
Action: Process

Status Messages (double-click to view log)

Date	Message
11/20/25 2:04:49 PM	Warning: NMLS_ID:999
11/20/25 2:04:49 PM	Warning: NMLS_ID:356
11/20/25 2:04:49 PM	Warning: Charge 'State
11/20/25 2:04:49 PM	Warning: Charge 'City/C
11/20/25 2:04:49 PM	Warning: Charge 'State
11/20/25 2:04:49 PM	Warning: Charge 'City/C
11/20/25 2:04:49 PM	Warning: Charge 'Title -
11/20/25 2:04:49 PM	Warning: Charge 'Title -
11/20/25 2:04:49 PM	Warning: Charge 'Tax S

Document Packages

Name	Vendor ID	Cr
DocMagic Loan Estim...	883bc12b4d3c4...	11
DocMagic Loan Estim...	31695a4dbdbc4...	11

Documents

Status	Category	Type	Description	Date/Time Created
Not Reviewed			N Documents	11/20/2025 2:04:49 PM

Document Viewer

DSI Test Lender (Sales)
Loan Estimate
Loan Amount: \$116,000
Interest Rate: 3.5%
Monthly Principal & Interest: \$520.89
Estimated Total Monthly Payment: \$520.89
Estimated Closing Costs: \$2,346
Estimated Cash to Close: \$25,896

- The *Just Submit; I Am Not Disclosing* option is intended for preview purposes only. It generates a watermarked copy of the document package and **does not** retain the loan data or documents within DocMagic.
- Since the transaction is not stored, DocMagic Support and Customer Service will not be able to access, troubleshoot, or review the package.

Document Packages

The screenshot displays the DocMagic Loan Estimate interface. At the top, a yellow banner shows 'Activity by Pushback just now.' Below this, the 'Contact Information' section includes 'DocMagic Web Site' and 'Customer Support 1-800-649-1362'. The 'Loan Information' section shows 'Borrower BOB B SAMPLE' and 'Loan Number eSign-Test1'. A 'Document Package' window is open, showing a table with columns 'Field', 'Value', and 'Notes'. The table contains: Package Name (DocMagic Loan Estimate), Vendor (Doc Magic), Delivery Method (E-Sign), and Creation Date (11/20/2025 2:07 PM). Below this, a 'Status Messages' section lists messages with dates and times, including 'eSign: Loan Estimate, eS' and 'Warning: NMLS_ID-999'. A 'Document Packages' section at the bottom lists packages with columns 'Name', 'Vendor ID', and 'Created'. A 'Document Package' window is also open, showing a preview of a document with a 'Select All None' button.

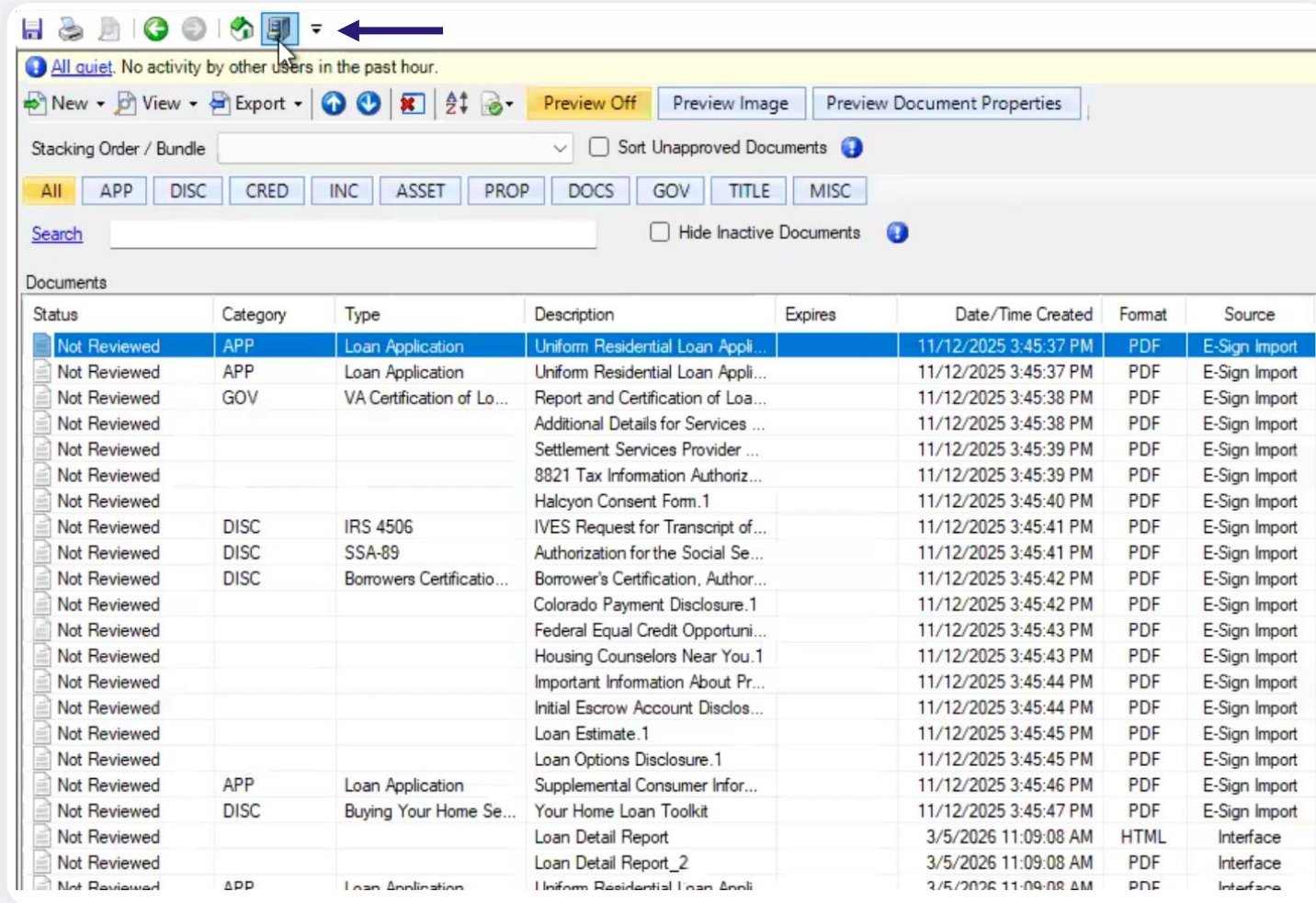
Field	Value	Notes
Package Name	DocMagic Loan Estimate	
Vendor	Doc Magic	
Delivery Method	E-Sign	
Creation Date	11/20/2025 2:07 PM	

Date	Message
11/20/25 12:12:47 PM	eSign: Loan Estimate, eS
11/20/25 12:12:47 PM	eSign: Loan Estimate, Lo
11/20/25 12:12:47 PM	eSign: Loan Estimate, eS
11/20/25 12:12:45 PM	eSign: Loan Estimate, Ap
11/20/25 12:12:30 PM	eSign: Loan Estimate, Co
11/20/25 12:07:18 PM	eSign: Loan Estimate, eS
11/20/25 2:07:17 PM	Warning: Loan Estimate
11/20/25 2:07:17 PM	Warning: NMLS_ID-999
11/20/25 2:07:17 PM	Warning: NMLS_ID-356

Name	Vendor ID	Created
DocMagic Loan Estim...	883bc12b-4d3c4...	11
DocMagic Loan Estim...	31695e4dbdb4...	11
DocMagic Loan Estim...	f0c7de8b14d74...	11

- Regardless of the option selected, the request will appear as a line item in the Document Packages section near the bottom of the interface. Double click on any item to open and view the package.
- Byte also displays push notifications in Status Messages. These will come in as borrowers go through the eSign process.
- The Save button (floppy disk icon) in the upper-left corner can also be used to refresh the page and retrieve the latest transaction information.

View Completed Docs



All quiet. No activity by other users in the past hour.

New View Export Preview Off Preview Image Preview Document Properties

Stacking Order / Bundle Sort Unapproved Documents

All APP DISC CRED INC ASSET PROP DOCS GOV TITLE MISC

Search Hide Inactive Documents

Status	Category	Type	Description	Expires	Date/Time Created	Format	Source
Not Reviewed	APP	Loan Application	Uniform Residential Loan Appli...		11/12/2025 3:45:37 PM	PDF	E-Sign Import
Not Reviewed	APP	Loan Application	Uniform Residential Loan Appli...		11/12/2025 3:45:37 PM	PDF	E-Sign Import
Not Reviewed	GOV	VA Certification of Lo...	Report and Certification of Loa...		11/12/2025 3:45:38 PM	PDF	E-Sign Import
Not Reviewed			Additional Details for Services ...		11/12/2025 3:45:38 PM	PDF	E-Sign Import
Not Reviewed			Settlement Services Provider ...		11/12/2025 3:45:39 PM	PDF	E-Sign Import
Not Reviewed			8821 Tax Information Authoriz...		11/12/2025 3:45:39 PM	PDF	E-Sign Import
Not Reviewed			Halcyon Consent Form.1		11/12/2025 3:45:40 PM	PDF	E-Sign Import
Not Reviewed	DISC	IRS 4506	IVES Request for Transcript of...		11/12/2025 3:45:41 PM	PDF	E-Sign Import
Not Reviewed	DISC	SSA-89	Authorization for the Social Se...		11/12/2025 3:45:41 PM	PDF	E-Sign Import
Not Reviewed	DISC	Borrowers Certificatio...	Borrower's Certification, Author...		11/12/2025 3:45:42 PM	PDF	E-Sign Import
Not Reviewed			Colorado Payment Disclosure.1		11/12/2025 3:45:42 PM	PDF	E-Sign Import
Not Reviewed			Federal Equal Credit Opportuni...		11/12/2025 3:45:43 PM	PDF	E-Sign Import
Not Reviewed			Housing Counselors Near You.1		11/12/2025 3:45:43 PM	PDF	E-Sign Import
Not Reviewed			Important Information About Pr...		11/12/2025 3:45:44 PM	PDF	E-Sign Import
Not Reviewed			Initial Escrow Account Disclos...		11/12/2025 3:45:44 PM	PDF	E-Sign Import
Not Reviewed			Loan Estimate.1		11/12/2025 3:45:45 PM	PDF	E-Sign Import
Not Reviewed			Loan Options Disclosure.1		11/12/2025 3:45:45 PM	PDF	E-Sign Import
Not Reviewed	APP	Loan Application	Supplemental Consumer Infor...		11/12/2025 3:45:46 PM	PDF	E-Sign Import
Not Reviewed	DISC	Buying Your Home Se...	Your Home Loan Toolkit		11/12/2025 3:45:47 PM	PDF	E-Sign Import
Not Reviewed			Loan Detail Report		3/5/2026 11:09:08 AM	HTML	Interface
Not Reviewed			Loan Detail Report_2		3/5/2026 11:09:08 AM	PDF	Interface
Not Reviewed	APP	Loan Application	Uniform Residential Loan Appli...		3/5/2026 11:09:08 AM	PDF	Interface

- Completed eSign packages are automatically returned to the Stored Documents section, where the Source will be identified as E-Sign Import.
- Please note that DocMagic requires all designated participants to complete their signatures before a package is considered complete and returned to the LOS.
- Byte does not overwrite previously imported versions of a document package. Signed and unsigned versions will remain in the Stored Documents section.

Manually Push Docs

Contact Information

[DocMagic Web Site](#)
Customer Support 1-800-649-1362

Order Information

Worksheet # esigntesting1
Loan Plan Code DSI_CONV - ALL [Refresh](#)
Alt Lender Code [Refresh](#)
Package Type Closing Documents
Method Seamless
Action Process

[Submit](#) [Defaults](#)

Status Messages (double-click to view long messages)

Date	Message
3/5/26 11:09:07 AM	Warning: School Property Tax (OPI): \$50
3/5/26 11:09:07 AM	Warning: _____% of Loan Amount (Poi
3/5/26 11:09:07 AM	Warning: Charge 'State Mortgage Tax/S
3/5/26 11:09:07 AM	Warning: Charge 'City/County Mortgage
3/5/26 11:09:07 AM	Warning: Charge 'State Deed Tax/Stam
3/5/26 11:09:07 AM	Warning: Charge 'City/County Deed Tax
3/5/26 11:09:07 AM	Warning: Charge 'Title - Document Prep
3/5/26 11:09:07 AM	Warning: Charge 'Title - Settlement Agen
3/5/26 11:09:07 AM	Warning: Charge 'Tax Service Fee' (TS)

[View Messages in New Window ...](#)

Document Packages

Name	Vendor ID	Created	Delivered	Received
DocMagic Initial Disclo...	ac682f32b19c4f...	11/12/2025 3:40:59 PM		
DocMagic Loan Estim...	20e8af83d07f49...	12/23/2025 3:03:29 PM		
DocMagic Loan Estim...	e2c40993abe54...	12/23/2025 3:38:14 PM		

Loan Information

Borrower BOB B SAMPLE
Loan Number eSign-Test1
Loan Program Fixed Rate

Document Package

[Summary](#) [Documents](#) [Download e-Signed Docs](#)

Field	Value	Notes
Package Name	DocMagic Closing Documents	
Vendor	Doc Magic	
Delivery Method		
Created	03/05/2026 11:09 AM	
Status	None	
E-Delivery Deadline	03/09/2026	
Compliance Deadline		
Subject Prop. Time Zone	(UTC-07:00) Mountain Time (US & Canada)	
Vendor ID	9c438db8d2cd4bd583eb2e18e7d91922	

Signers

Type	Name	Prior Consent	Consented	Signed	Hard-Copy	Locked ...	Bounced
Borrower	BOB B SAMPLE	No				No	No

Documents

Status	Category	Type	Description	Date/Time Created
Not Reviewed			Loan Detail Report	3/5/2026 11:09:08 AM
Not Reviewed			Loan Detail Report_2	3/5/2026 11:09:08 AM
Not Reviewed	APP	Loan Application	Uniform Residential Loan Appli...	3/5/2026 11:09:08 AM
Not Reviewed	APP	Loan Application	Uniform Residential Loan Appli...	3/5/2026 11:09:08 AM
Not Reviewed	DOCS	Note	Multistate Fixed Rate Note	3/5/2026 11:09:08 AM
Not Reviewed	DOCS	Security Instrument	Colorado Deed of Trust	3/5/2026 11:09:08 AM
Not Reviewed	DOCS	Closing Instructions	General Closing Instructions	3/5/2026 11:09:08 AM
Not Reviewed	DOCS	Closing Instructions	Specific Closing Instructions	3/5/2026 11:09:08 AM

[Defaults](#) [Close](#)

- If you need to manually return a document package from DocMagic to Byte before the signing process is complete, select the package from the Document Packages section and click Download eSigned Docs.
- This action will push the current version of the package back to Byte regardless of its signing status.

Frequently Asked Questions

My worksheet never gets imported into DocMagic Online and results in a double FATAL FATAL error message. Why?
When you choose the preview option in BytePro, *we do not save worksheet data*. In essence, the "import" doesn't happen.

Where can I find my documents in BytePro?
Click on the Stored Docs button – it looks like a file cabinet.

Does Byte support event notifications to other parties?
Yes. From the Delivery Options on the DocMagic order screen you can choose "Event Notification" under DocMagic eSign option.

Can I get my documents back as a DBK file?
No. DBK is not supported by Byte.

Does Byte support secure document delivery?
Yes. From the Delivery Options on the DocMagic order screen you can check a box labeled "E-Mail Secure Link to".

Does Byte support returning documents as both a set and individual docs?
Yes. Customize → Defaults → DocMagic. There's a checkbox for "Return Documents in Single PDF File".

Why are my deliver and receive dates not what I expected?
Check the Pushback Timezone selected in BytePro first. Customize → Defaults → Pushback Options