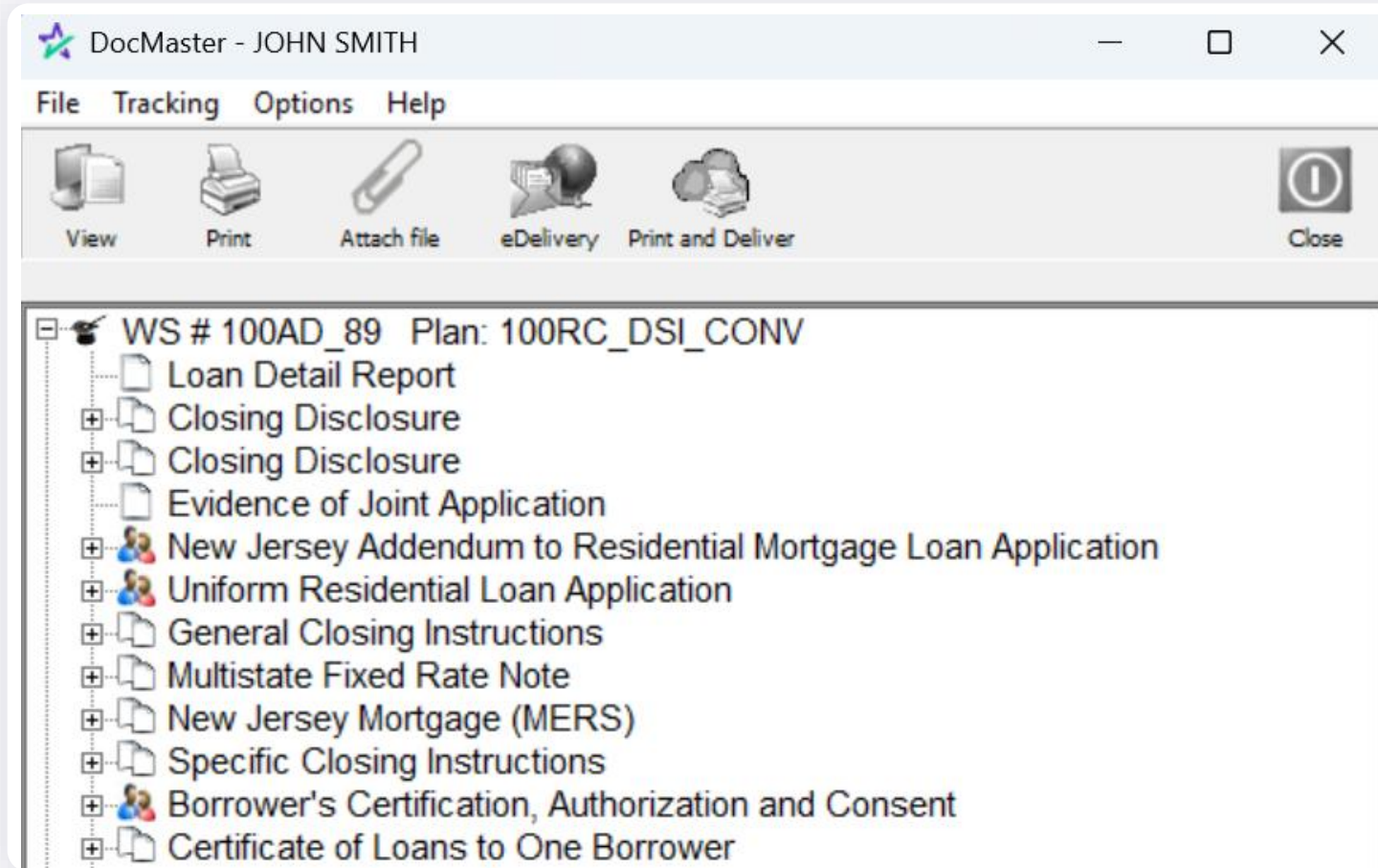


DocMaster

User Guide

Introduction – What Is DocMaster?



- DocMaster is DocMagic's proprietary solution utilized extensively by closing agents and others nationwide as a standalone application for viewing, printing, and eDelivering document packages that can be downloaded from our website.

DocMagic User Privileges

The screenshot displays the DocMagic dashboard for user Alan. The top navigation bar includes contact information (INFO@DOCMAGIC.COM, PHONE (800) 649-1362), the DocMagic logo, and menu items for SOLUTIONS, SERVICES, COMPLIANCE, SUPPORT, and COMPANY. A search icon and buttons for REQUEST A DEMO and DASHBOARD / LOG OUT are also present. The main content area is divided into several sections: Launch Center (eSign Console, AutoPrep™, DocMagic®, DocMagic® One, SmartCLOSE®, LoanMagic® Console, eVault, SmartREGISTRY™), My Documents (DOCUMENT FILES, STACKING ORDER, LOAN DEFAULTS, REPORT MANAGER, SAMPLE DOCUMENT REVIEW), Account Settings (USERS, PLAN MANAGER, LENDER PROFILE), and Latest News. A modal window is open over the My Documents section, showing a list of checked privileges: DocMaster Document Viewer, Docmaster Email enabled, Allow attachments, and Allow annotations. The Account Settings section has a purple border around the USERS option.

- Anyone using DocMaster must have the appropriate [User Privileges](#) enabled first.
 - DocMaster Document Viewer: Grants the user the authority to view and print document packages.
 - DocMaster Email enabled: Grants the user the authority to e-deliver a document package.
 - Allow Attachments: Grants the user the authority to attach other documents to the generated document package.
 - Allow Annotations: Grants the user the authority to annotate the generated documents.

Downloading DocMaster

The screenshot shows the DocMagic website with the 'Solutions' dropdown menu open. The menu lists various solutions such as Document Generation, eSignature Platforms, eMortgage Technology, Automated Compliance, Collaborative Technology, and eChattel Technology. A blue arrow points to the 'Download Now' button under the 'DocMaster Document Viewer' section.

- DocMaster requires a local installation on your computer.
- Hover your mouse over “Solutions” on the top ribbon of the website.
- Look for the Document Generation section in the middle left of the banner that appears and click “Downloads”.
- Click the Download Now button below DocMaster Document Viewer.
- Or just click [here](#).

Downloading DocMaster

The screenshot shows the DocMagic website with a navigation bar containing the logo and links for SOLUTIONS, SERVICES, COMPLIANCE, and SUP. The main content area provides instructions for downloading and installing DocMaster. A blue arrow points to an orange 'Download' button, with a link to 'See the release notes' below it. On the right side, a 'Downloads' window is open, showing a list of files. The file 'docmaster-5.10.0.0.msi' is highlighted with a blue border, and its 'Open file' option is visible. Other files in the list include PDFs and a text file, all marked as 'Removed'.

INFO@DOCMAGIC.COM | PHONE (800) 649-1362

DocMagic

SOLUTIONS SERVICES COMPLIANCE SUP

To view, print or email a set of documents (*.dbk), download and install DocMaster by following the instructions below.

Complete Install:

1. Click on the *Begin Download* button to download DocMaster.
2. After downloading the program, navigate to the path in which the file was saved.
3. Double-click the *docmaster-5.10.0.0.msi* icon. DocMaster will then install automatically.
4. Once installed, simply click the new DocMaster icon to launch the program.

[Download](#)

[See the release notes](#)

If you require any assistance with the installation or setup of DocMaster, please call our Technical Support Department at (800) 649-1362.

Downloads

- docmaster-5.10.0.0.msi
Open file
- 1645629-singleSigner.pdf
Removed
- 100AD-80-C.dbk
Removed
- 2026_05_28_04_52_31_bb_export.txt
Removed
- 1636829-Certificate.pdf
Removed
- 1636852-Certificate.pdf
Removed

[See more](#)

- Click the Download button, then double click on the installation wizard and follow the instructions on screen.
- As part of the installation process, you will check a box agreeing to our EULA and select the installation destination on your computer.
- Bypass any security warnings – DocMaster is safe and will not harm your computer.
- The final screen of the installation wizard will notify you that the program has successfully been installed on your computer. Click Finish to complete the installation.

DBK Files

WELCOME ALAN! (#100SALES) [TOUR THE DASHBOARD](#)

Launch Center: eSign Console, AutoPrep™

My Documents: **DOCUMENT FILES** (Access and manage your loan document files), FORM ANALYZER (Access our extensive forms library for document management)

Account Settings: USERS (Set up and manage user accounts and permissions), PLAN MANAGER (Manage the loan programs for your account)

WORKSHEET #	LOAN #	BORROWER	MODIFIED	TYPE	ACTION
130	Tucker_1	Ron Sample	06-09-2026 01:44:40 PM	Predisclosure	
R000004	R000004	Sales Demo Borrower	06-09-2026 01:19:44 PM	Predisclosure	
4369	777060920260001	JOHN SMITH	06-08-2026 12:55:06 PM	Closing	
R000002	R000002	Mark Sample Borrower	06-08-2026 01:36:11 PM	Predisclosure	

- DocMaster works with files in a proprietary DBK (“DocBlock”) format. If you are not using DocMagic Online, you can download DBK copies of every document package in the [Document Files](#) section of the Dashboard under My Documents.
- Click on the leftmost icon of the corresponding document package to download the DBK file – the icon that resembles a piece of paper being pulled out of a hat.

DBK Files

Document Processing Options

Worksheet #81 (SMITH) is queued for processing.

General Options

Package Type: Closing

File Format: Adobe PDF DBK (PCL)

Language: English

Process Complete

Congratulations!

Your documents have been processed successfully.

WebSheet: 81


Borrower: JOHN SMITH

WebDocs Code: 100AD-16GJ-H9J-6Q0JA8L

[Click here to download your documents](#)

[Click here to download the FREE DocMagic viewer](#)
(the software REQUIRED to view and print documents).

Don't show this window again.



Disable Recipient Printing

Additional Services

Print and Deliver

Flood Certification Life of Loan? Yes No

MERS Registration

Process Cancel

Your DocMagic OnLine Worksheet has been successfully processed!

To access your documents, choose a document format below:

1. [Click here](#) for documents in **DSI's DocMaster (.dbk) format**
(Requires DSI's **FREE** DocMaster viewer program).
- OR**
2. [Click here](#) for documents in **Adobe Acrobat (.pdf) format**.

FREE viewer downloads:

To download DocMaster, visit www.docmagic.com.
To download Adobe Reader, visit www.adobe.com.

Your documents are also available for download at www.docmagic.com.
Your [WebDocs](#) retrieval code is: **100AD-16GJ-H9J-6Q0JA8L**

Processing Messages:

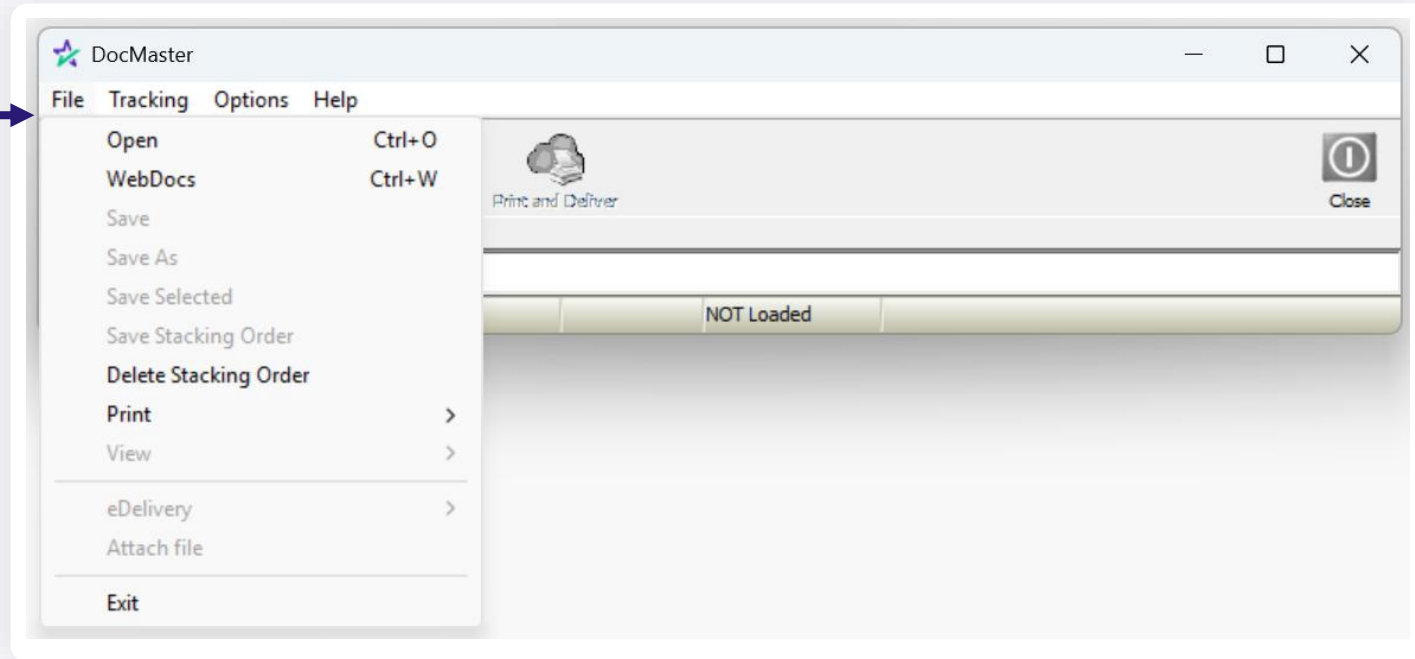
Worksheet Saved
Worksheet Audit complete
Worksheet Audited (outstanding audits detected)
Service(GFEWrite) successfully completed.
Code for Web Pickup is:100AD-16GJ-H9J-6Q0JA8L
Service(WebDocs) successfully completed.
Service(DocumentResponse) successfully completed.

Form Messages:

CD.DS : Lender is missing NMLS ID, Contact, Contact NMLS ID, Email, Ph
CD.DSC-SELLE : Lender is missing NMLS ID, Contact, Contact NMLS ID, E
4506C.MSC-AL : No TaxTranscript Parties found for PartyIDs

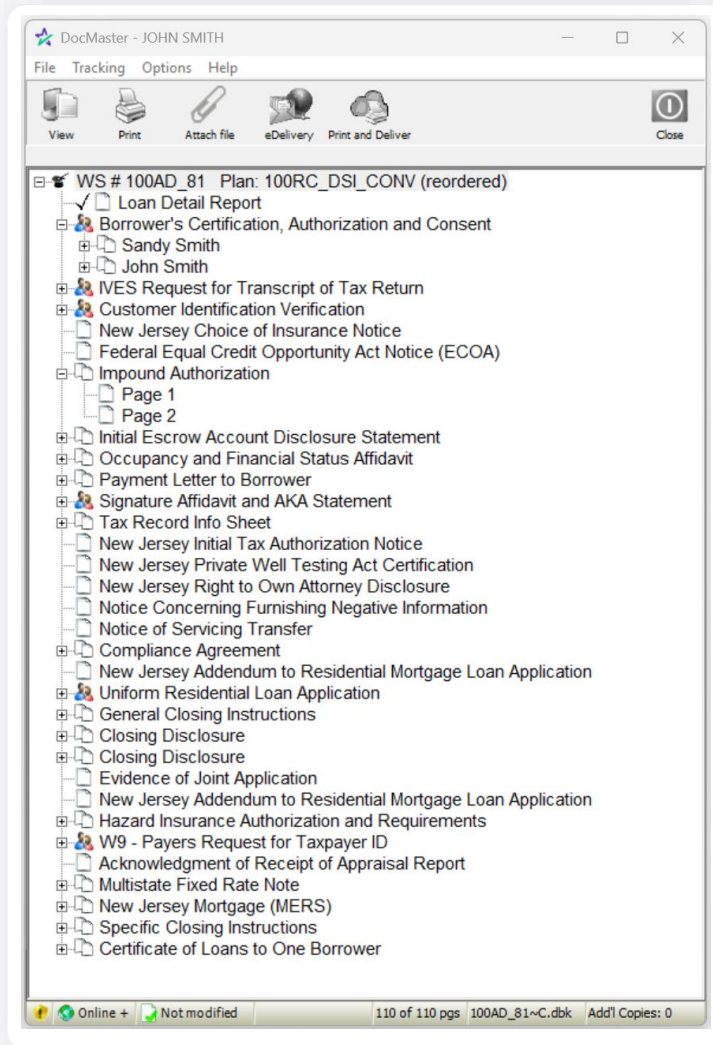
- If you *are* using [DocMagic Online](#), you can generate DBK files from the Process Confirmation window and download them directly from the window (left).
- You can also download them from the Process Confirmation email (right).

Loading a DocMaster File



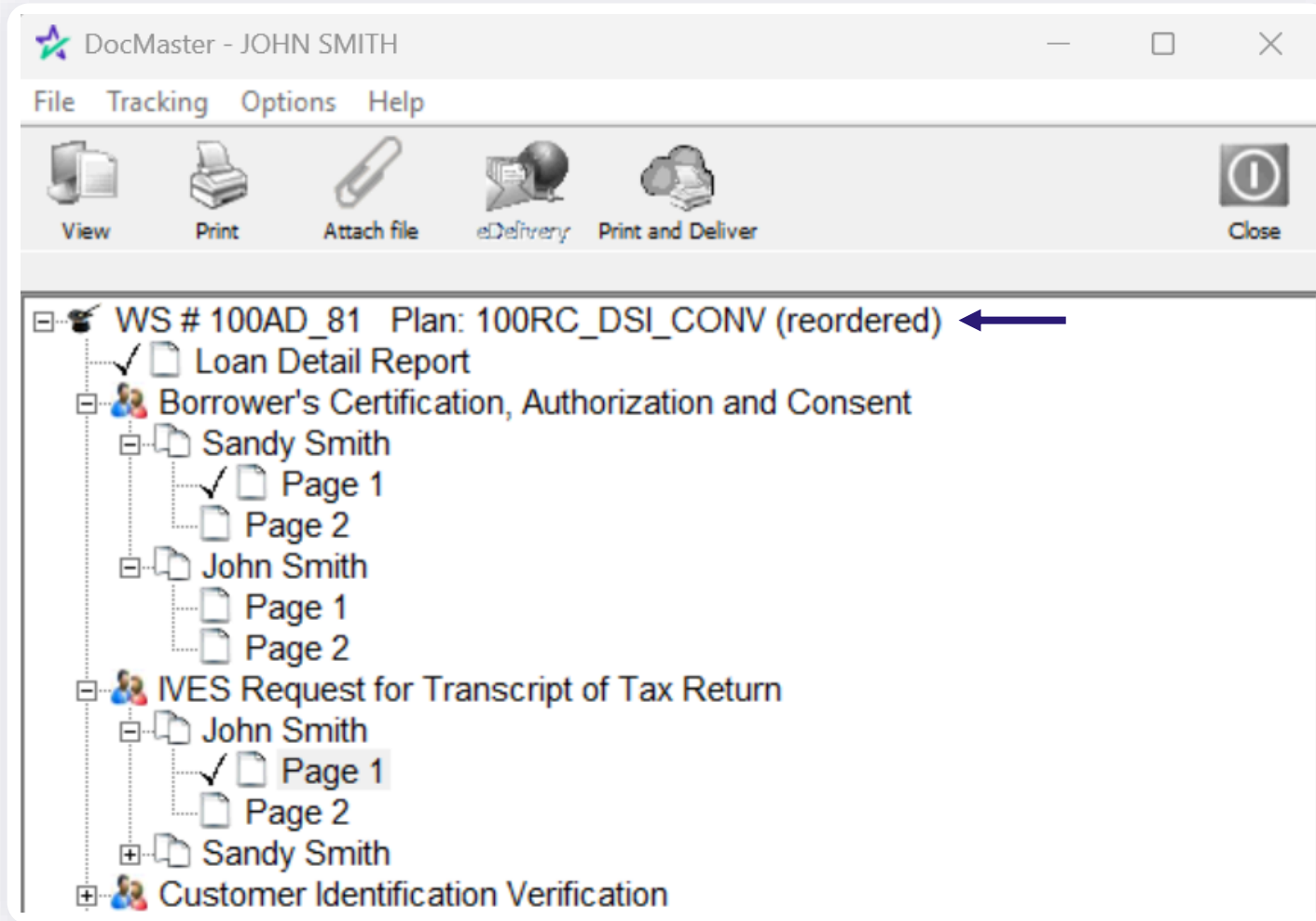
- You can launch DocMaster like any other application on your computer. When launched this way, it will open without any files loaded.
- Click File in the upper-left corner and select a DBK file from your computer or enter a WebDocs code. You can find the code in the Process Confirmation window or in the email shown on the previous slide.

Loading a DocMaster File



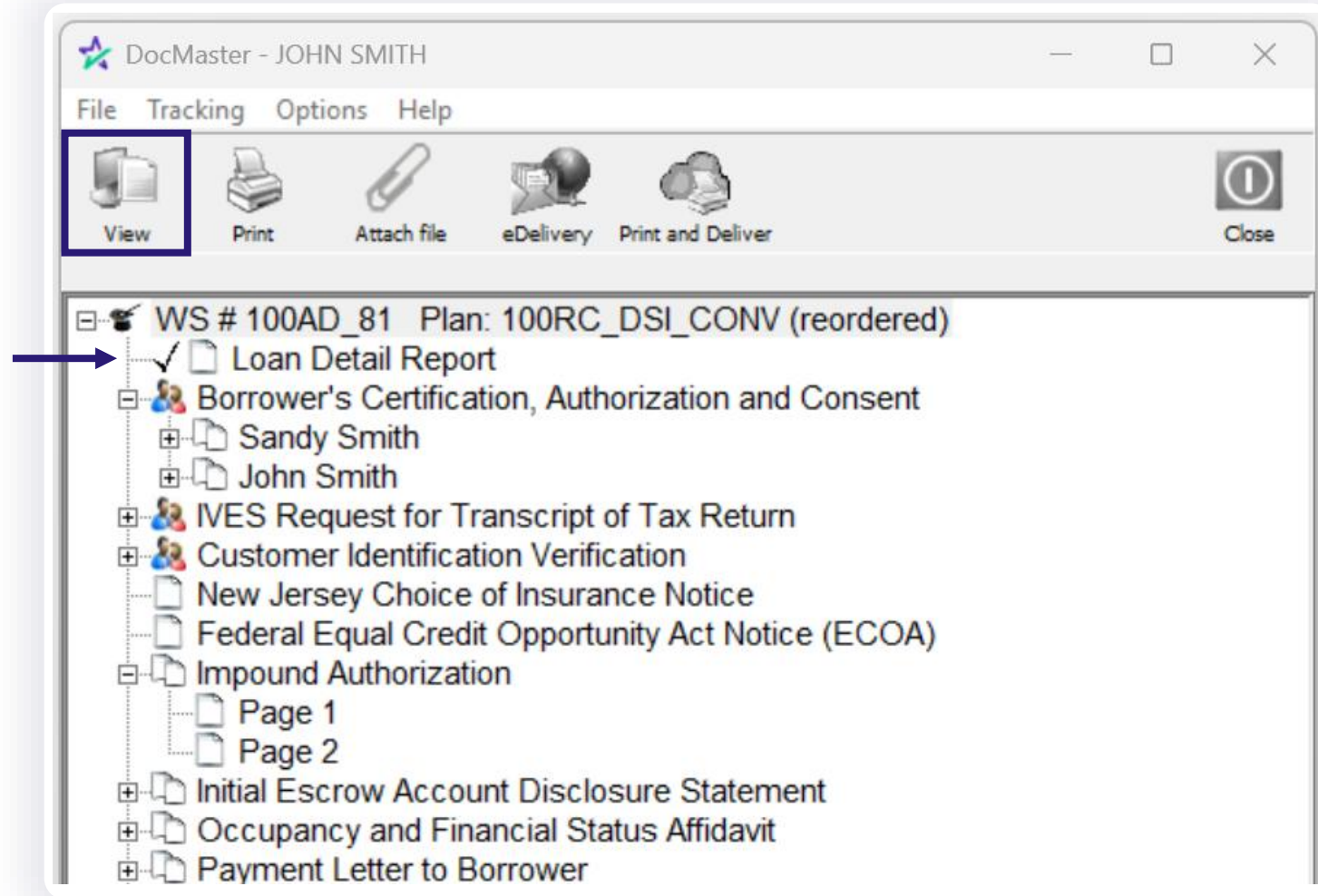
- Once a file is loaded, either using one of the methods on the previous screen or by double clicking a DBK file saved locally on your computer, you will see the full list of forms, as shown in the image on the left.
- Click on a form to select it. Selected forms will be highlighted **blue**.
 - Ctrl + click to select multiple forms individually.
 - Use shift + click to select a range of forms (click on the first form, then shift click the last one).

DocMaster Forms List



- You'll find your Account Number, Worksheet Number, followed by the Loan Program used to generate the package at the top of the list, plus an indicator that the package has been modified from your account's standard stacking order if applicable "(reordered)".
- On the left side, click on the (+) to expand your options – if you have multiple forms per borrower, or if you have multiple pages on a form. Similarly, click on (-) to collapse.

Viewing and Annotating Forms



- The View icon allows you to view and annotate your selected forms in a separate window – covered on the next slides. You can also double click on any form to view it directly.
- Viewed pages will be denoted by a check mark (next to Loan Detail Report in the image).
- If the View icon is greyed out, please check to see if you have anything selecting.

Viewing and Annotating Forms

4506c.msc-alt.xml: IVES Request for Transcript of Tax Return, JOHN SMITH, Page 1 of 2

File View Help

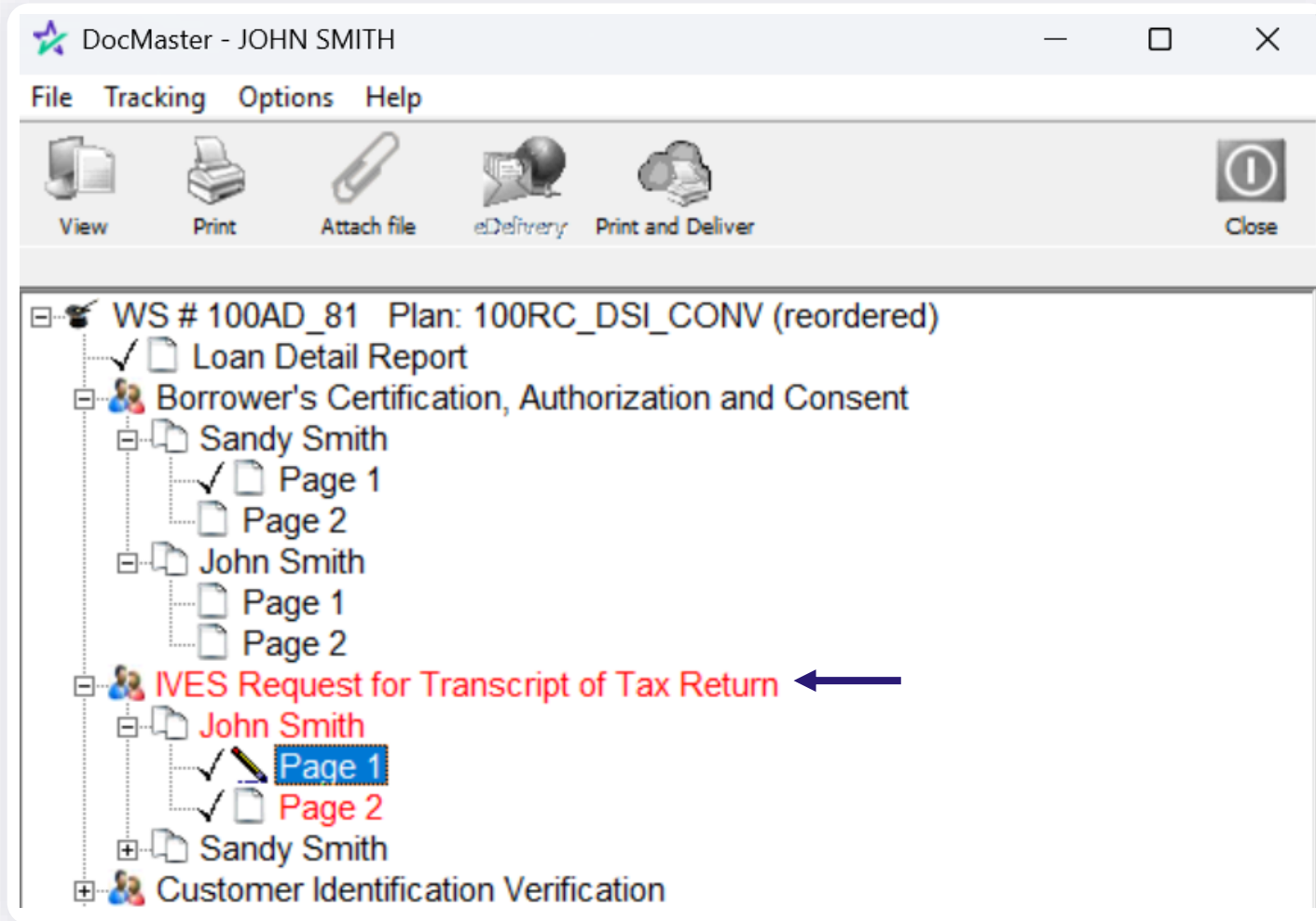
Print Zoom In Zoom Out Add Text Del Text Save Prev Pg 1 of 2 Next Pg

Press [CTRL] and Click to select multiple forms

Form 4506-C (October 2022)	Department of the Treasury - Internal Revenue Service IVES Request for Transcript of Tax Return	OMB Number 1545-1872	
test annotation			
Do not sign this form unless all applicable lines have been completed. Request may be rejected if the form is incomplete or illegible. For more information about Form 4506-C, visit www.irs.gov and search IVES.			
1a. Current name			
i. First name JOHN	ii. Middle initial	iii. Last name/BMF company name SMITH	
2a. Spouse's current name (if joint return and transcripts are requested for both taxpayers)			
i. Spouse's first name	ii. Middle initial	iii. Spouse's last name	
1b. First taxpayer identification number (see instructions) 112-22-3333			
2b. Spouse's taxpayer identification number (if joint return and transcripts are requested for both taxpayers)			
1c. Previous name shown on the last return filed if different from line 1a			
i. First name	ii. Middle initial	iii. Last name	
2c. Spouse's previous name shown on the last return filed if different from line 2a			
i. First name	ii. Middle initial	iii. Last name	
3. Current address (including apt., room, or suite no.), city, state, and ZIP code (see instructions)			
a. Street address (including apt., room, or suite no.) 222333 PEACHTREE PLACE	b. City ATLANTA	c. State GA	d. ZIP code 30318
4. Previous address shown on the last return filed if different from line 3 (see instructions)			
a. Street address (including apt., room, or suite no.) 123 ANYWHERE STREET	b. City ANYTOWN	c. State NY	d. ZIP code 12345
5a. IVES participant name, ID number, SOR mailbox ID, and address			
i. IVES participant name	ii. IVES participant ID number	iii. SOR mailbox ID	
iv. Street address (including apt., room, or suite no.)	v. City	vi. State	vii. ZIP code
5b. Customer file number (if applicable) (see instructions) 777061020260001			5c. Unique identifier (if applicable) (see instructions)
5d. Client name, telephone number, and address (this field cannot be blank or not applicable (NA))			

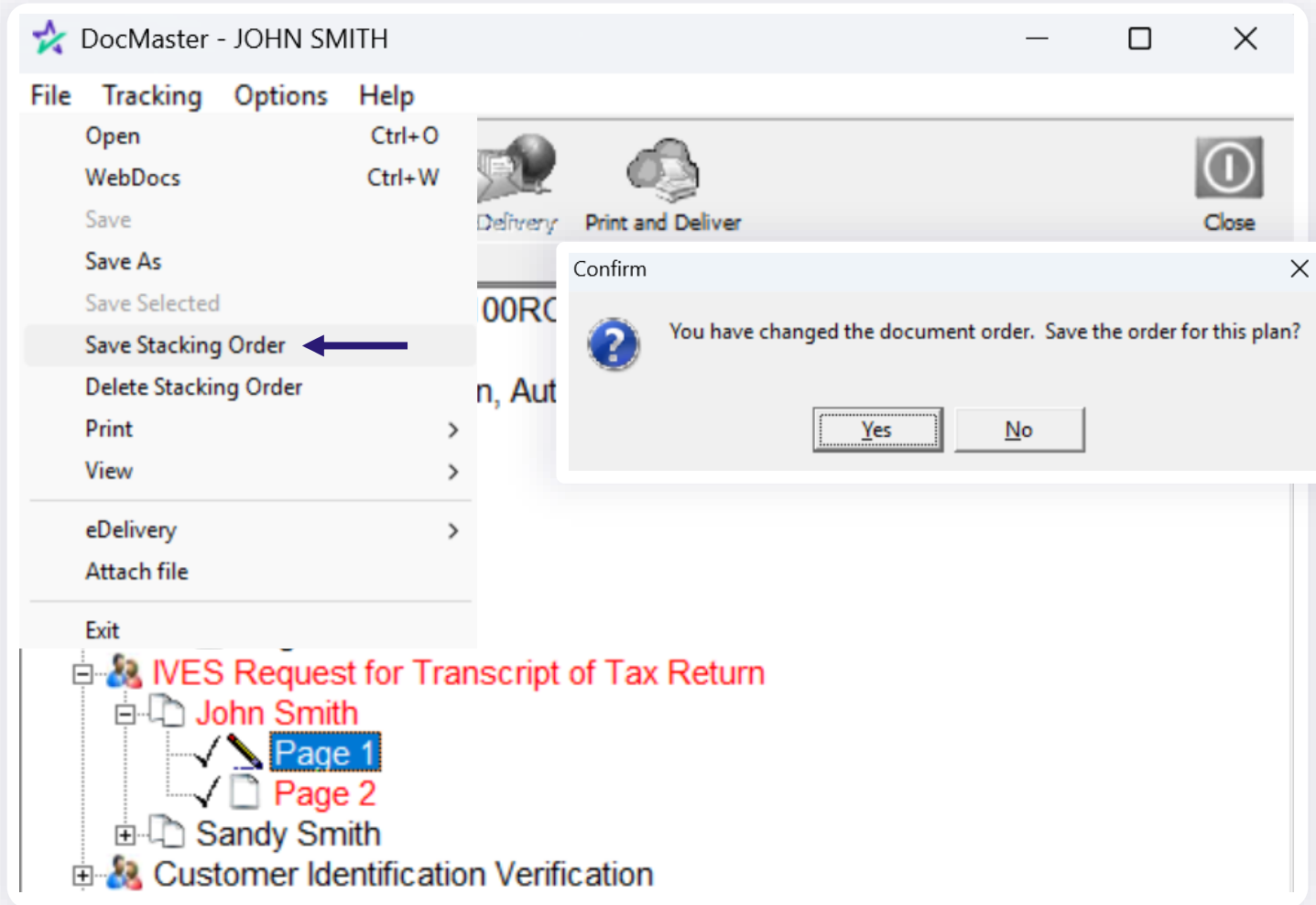
- At the top, you'll find controls to print, zoom in or out, navigate between pages, or go directly to a specific page.
- You also have controls for annotating:
 - Click Add Text, then select the location in your document where you want to place the annotation. Start typing, and your text will appear in **green**.
 - Click Del Text to remove any annotations.
 - Click Save to apply your annotations to the document—you can still delete them later.

Viewing and Annotating Forms



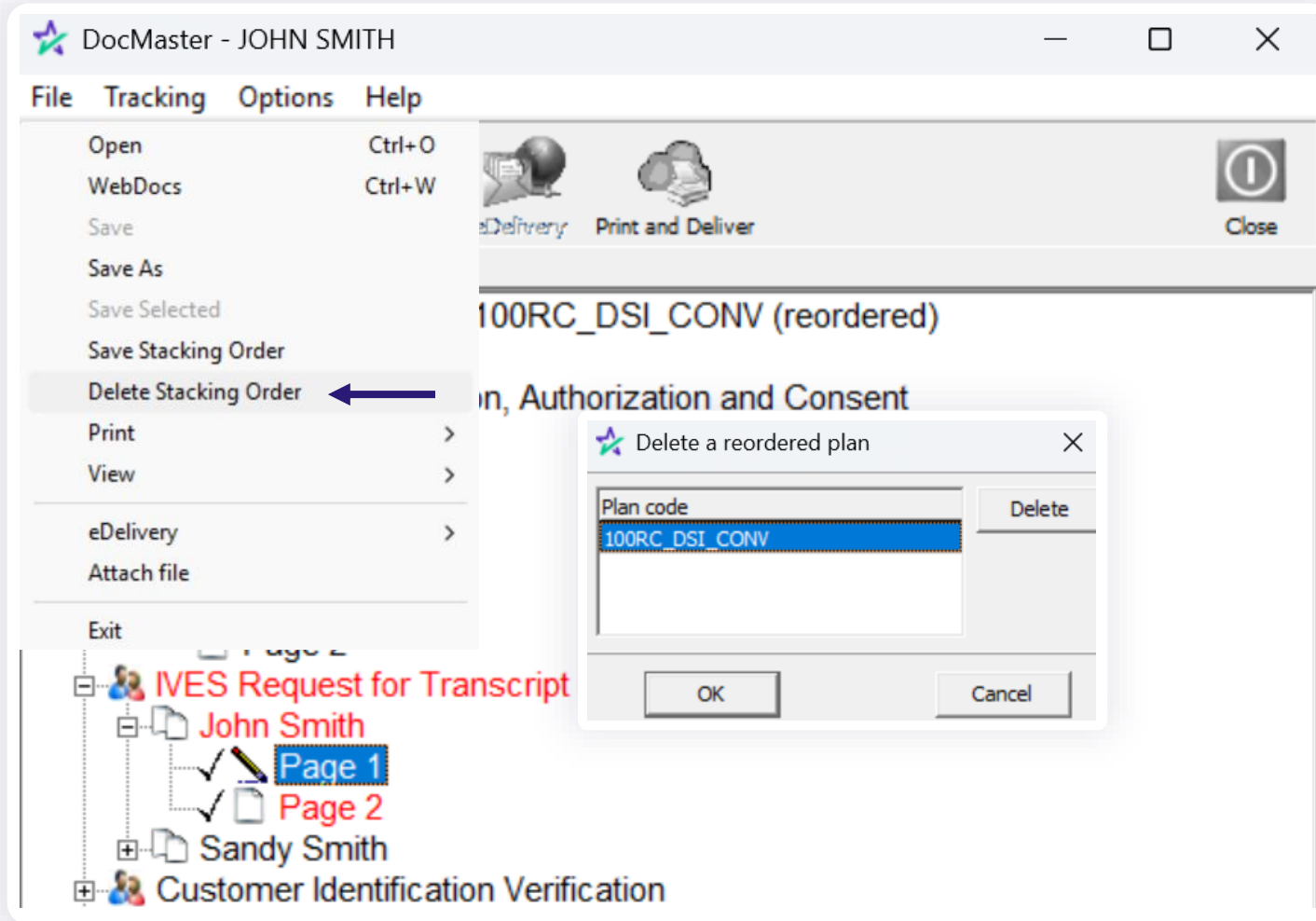
- When you return to the main document stack, you'll notice that the annotated document appears in **red**, indicating it has been edited or modified. The page containing the annotation will be marked with a pen icon.

Adjusting Stacking Order



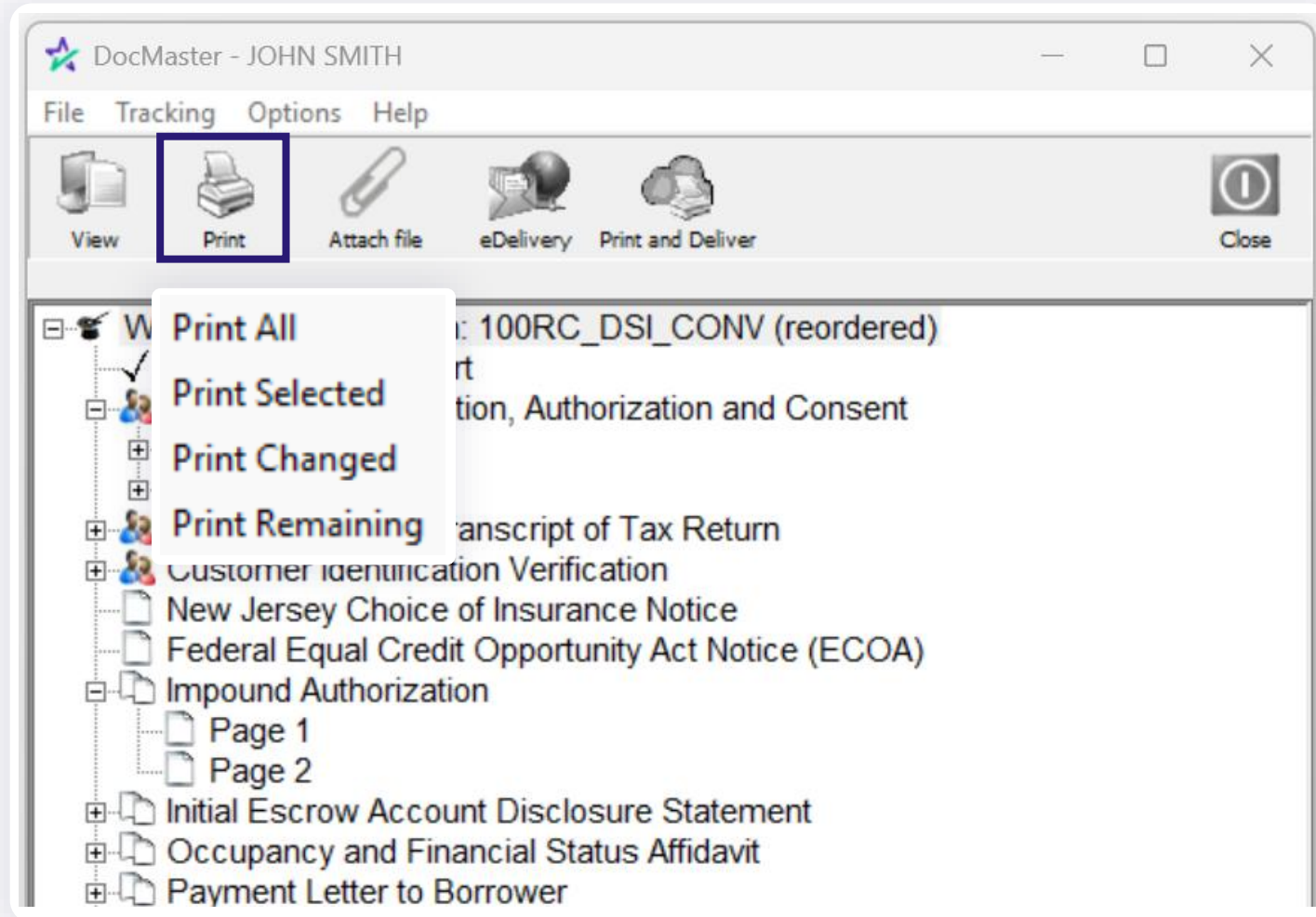
- You can also adjust the stacking order by clicking and dragging the forms you want to rearrange. However, please note that forms that were moved this way may not be marked in red.
- If you want to save the stacking order, you can do so in the File menu. However, please keep in mind that this only changes the stacking order *in DocMaster*.
- If you try to exit the system with unsaved stacking order changes, you will be prompted to save.

Adjusting Stacking Order



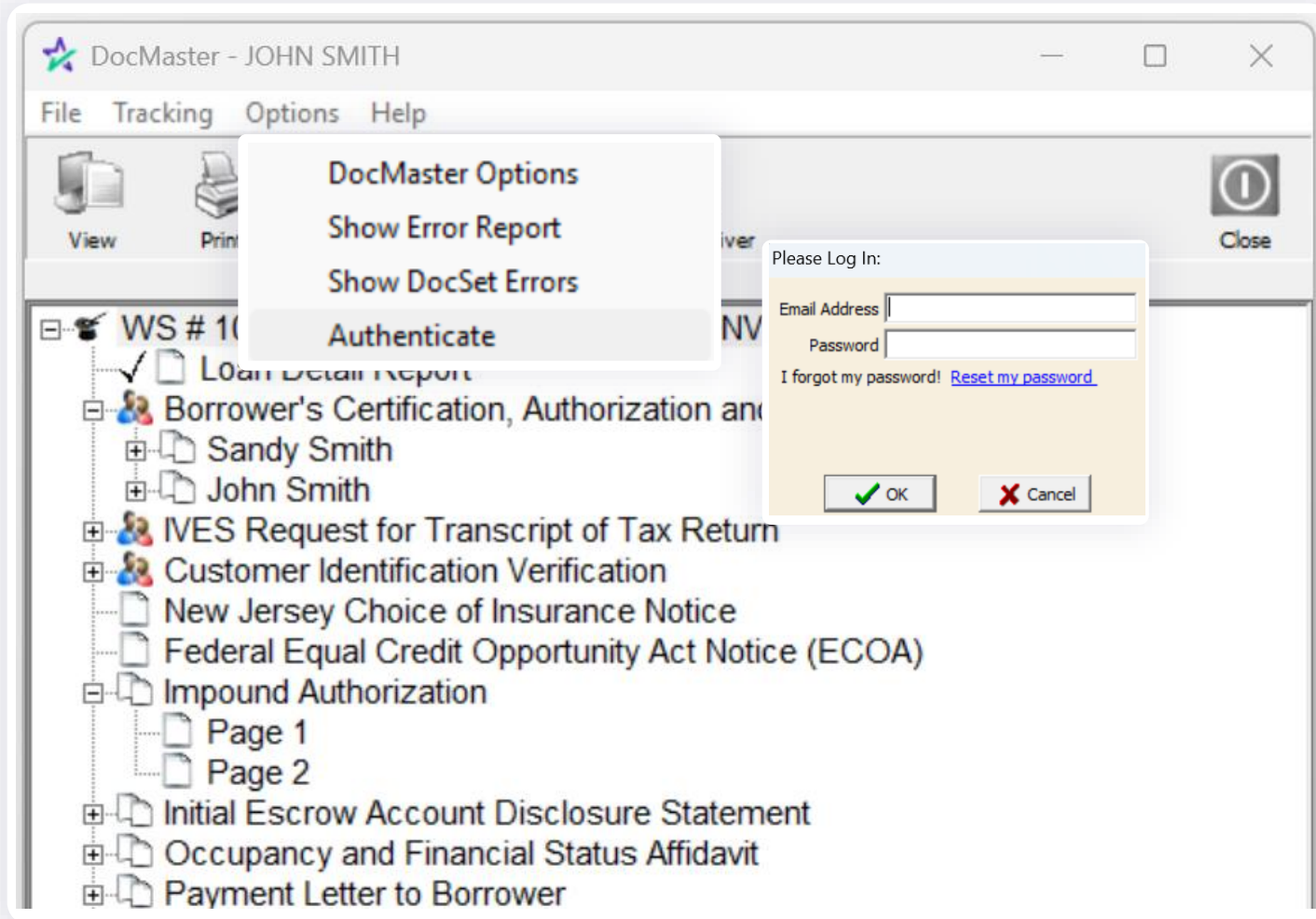
- If you want to reset the stacking order of the package to match the default one associated with your account, delete the stacking order saved to the package. Close DocMaster, then reopen the file to see your changes reflected.

Printing



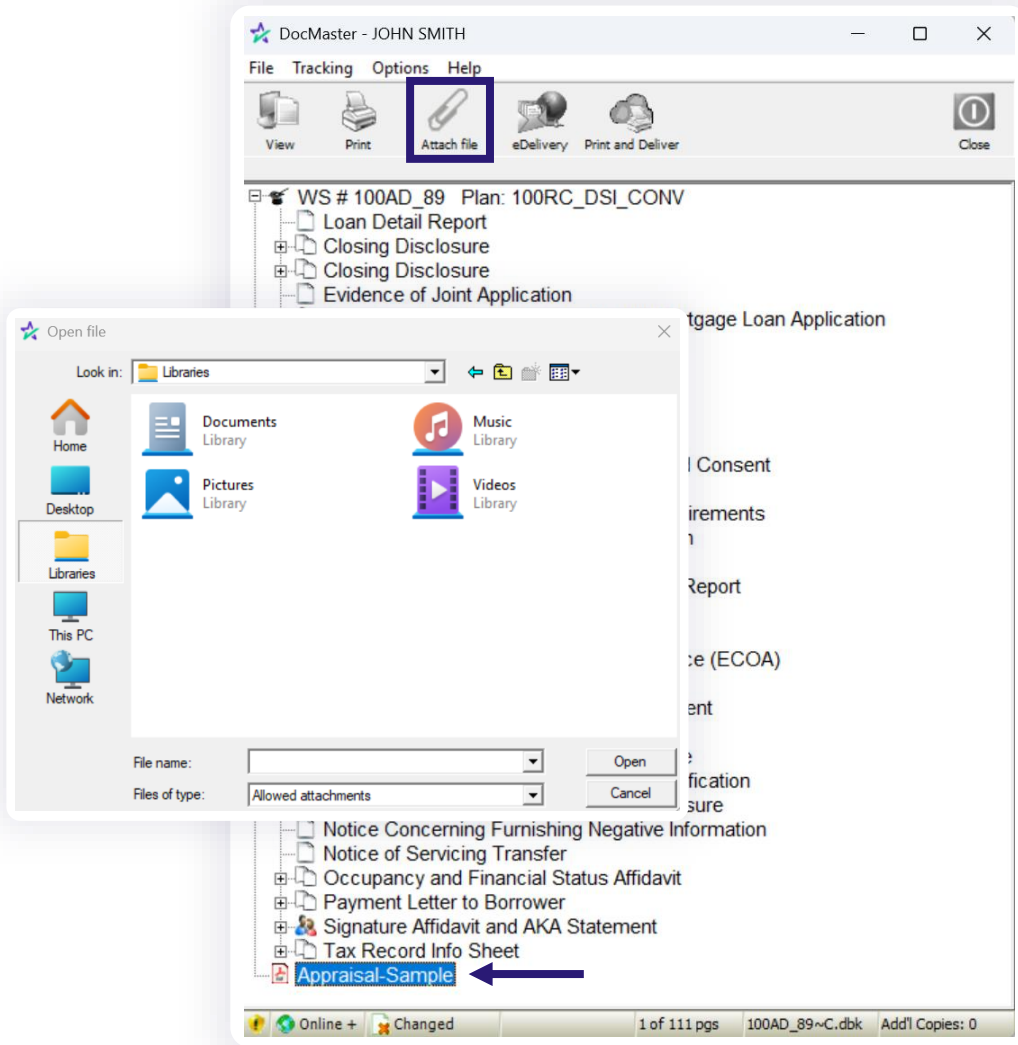
- You have four ways to Print.
 - Print All prints everything.
 - Print Selected prints only the documents currently selected (highlighted **blue**). You can also save a selection of forms as a separate file using the Save Selected function.
 - Print Changed prints out any edited or changed forms denoted by the **red** text.
 - Print Remaining allows you to highlight a single document, print it, and every subsequent document below it in the stack.

Authenticating



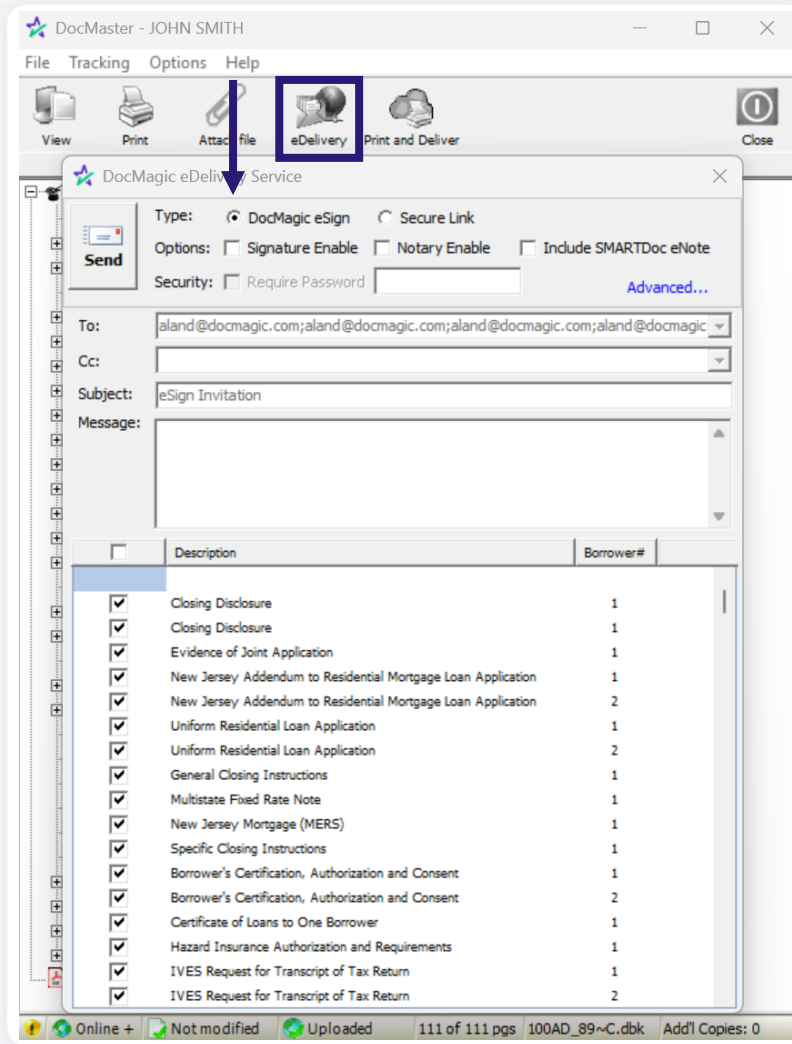
- The next two icons, Attach File and eDelivery, may be greyed out if you have not entered the appropriate credentials.
- Go to Options → Authenticate and enter the Email Address and Password associated with the file.

Attach File

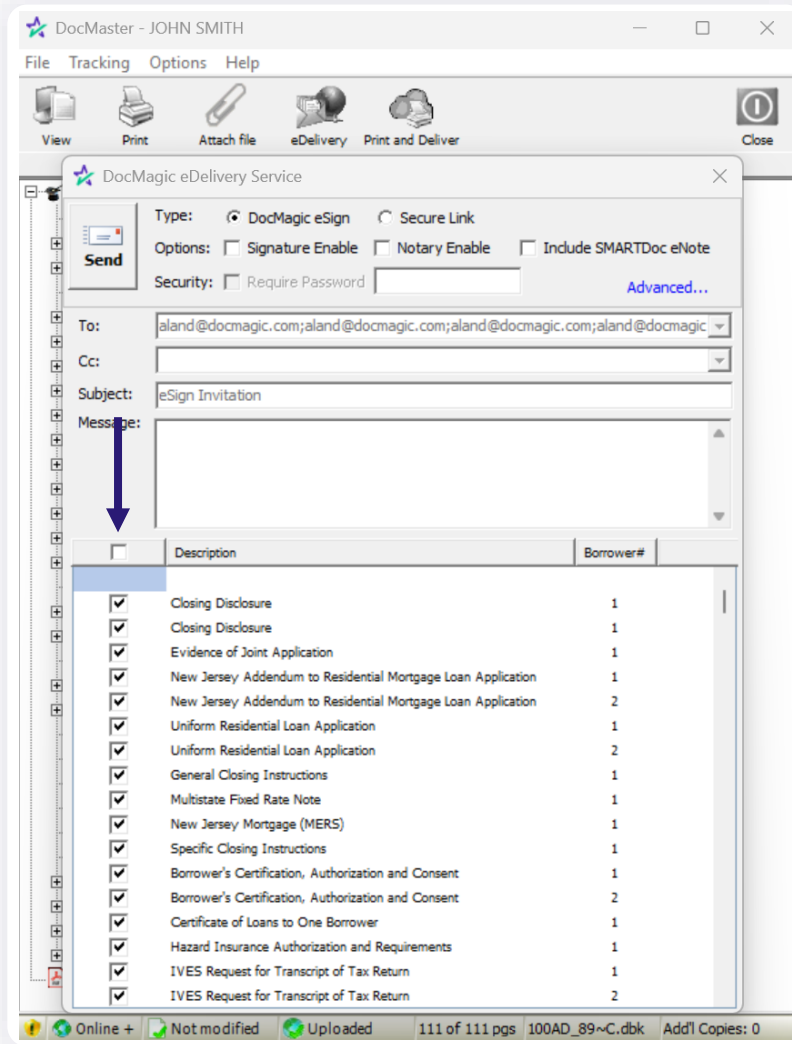


- Attach File allows you to select a document from your computer to attach to the package.
- Please Note: This is how you send Appraisals through DocMagic! The Appraisal button in DocMagic Online does not work!

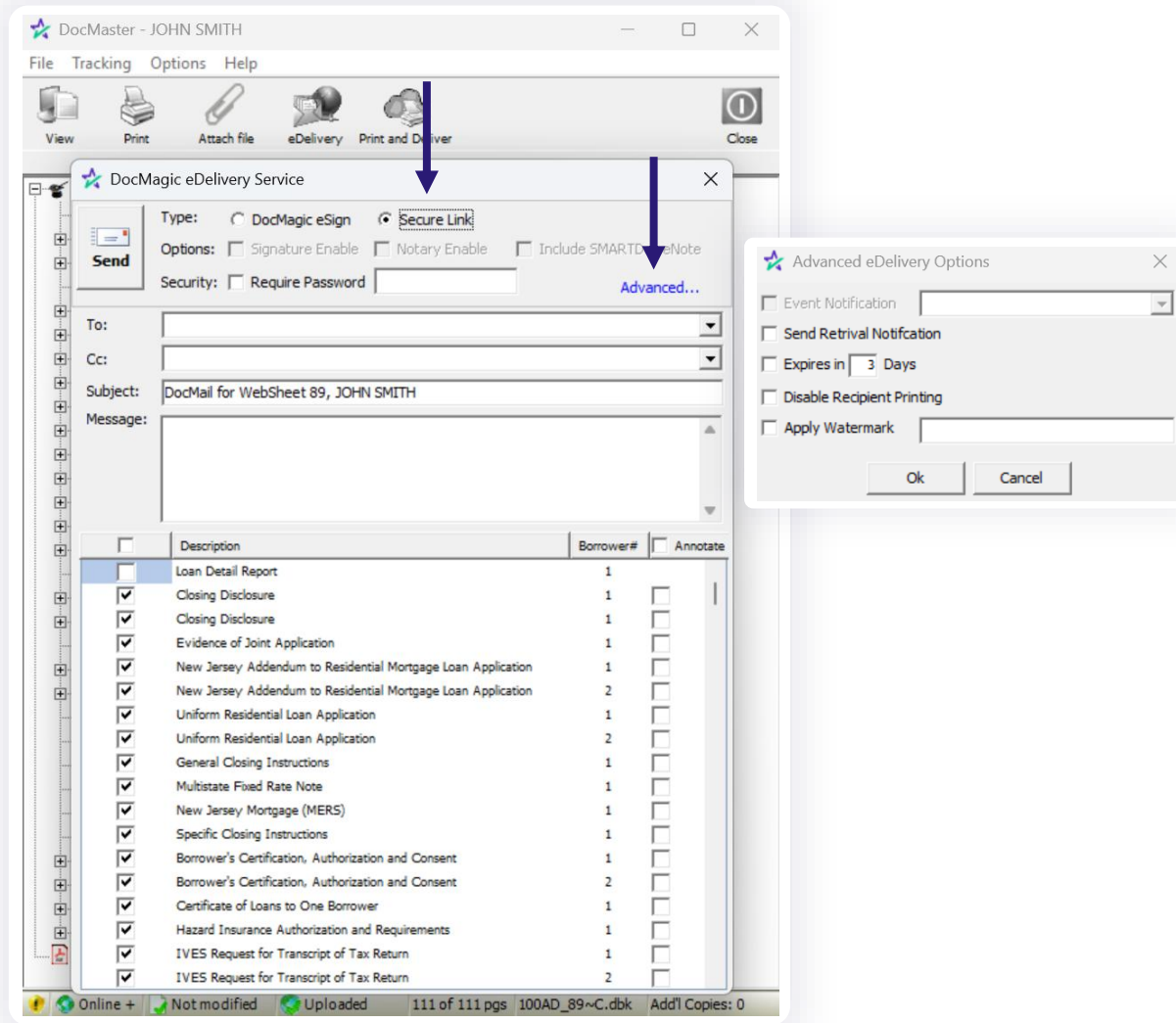
eDelivery



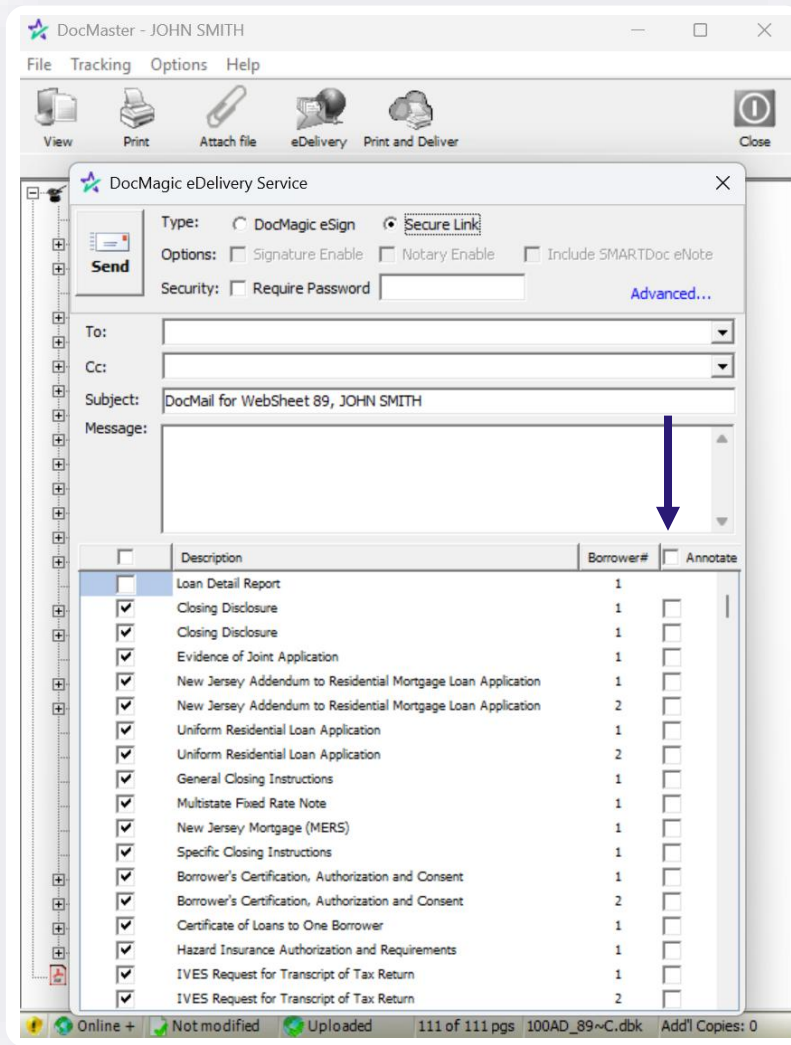
- Select eDelivery to view your eDelivery options.
- DocMagic eSign will be selected by default. The options in the row below correspond to this method:
 - Signature Enable: If you do not check this box, an eSign package will be created in the eSign Console and emails will go out to participants, but *nobody will be able to electronically sign their documents.*
 - For Closing Packages, please also specify if you want to generate an eNote or use an eNotary.



- In the section below, select the documents to include in this eDelivery. All documents will be selected by default. You can deselect individual forms or use the checkbox in the top-left corner to select or clear all.
- Confirm your forms list and hit Send. Emails will go out to participants, and you will see the package in your eSign Console.
- Many of the options on this screen will be disabled for eSign, and are reserved for the Secure Link option, covered next.

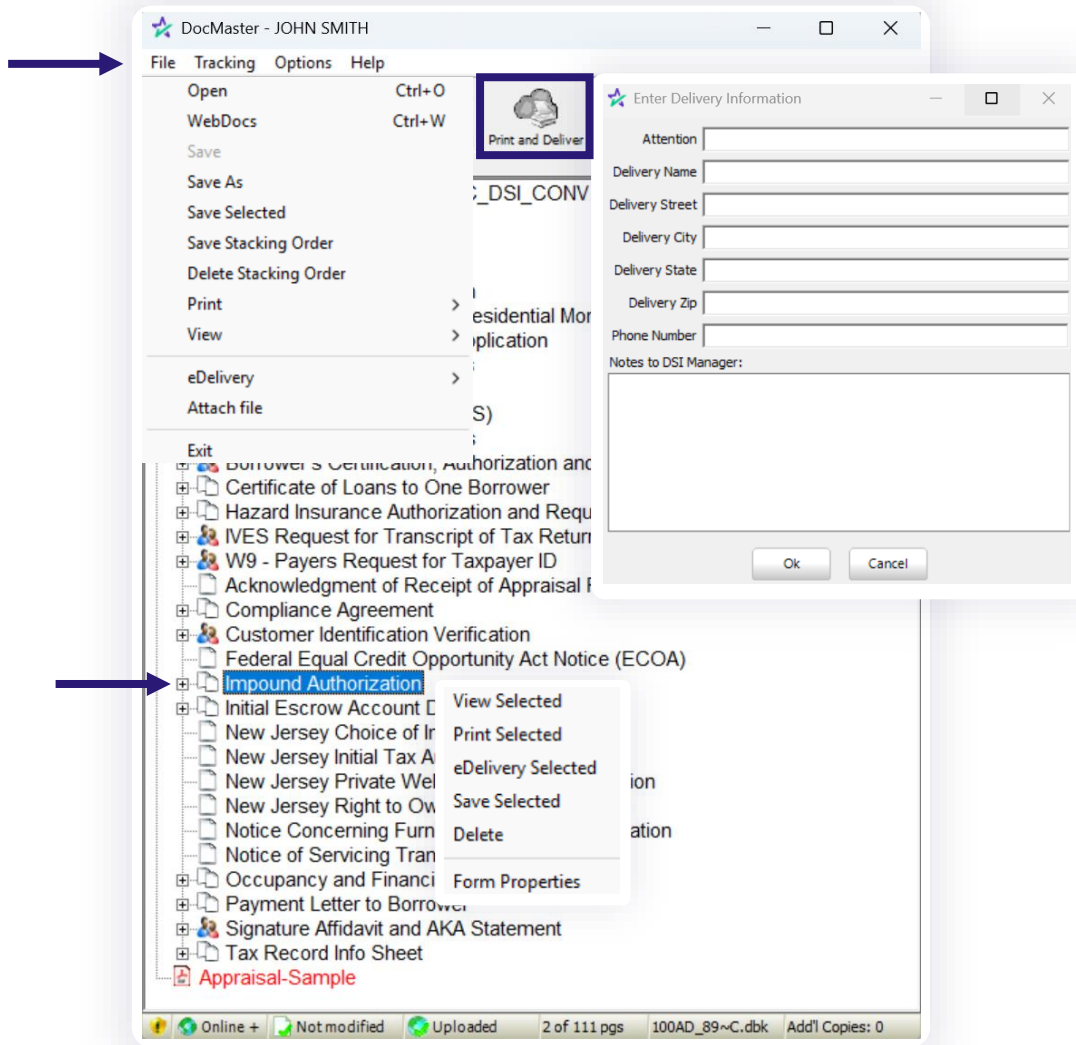


- Your other eDelivery option is Secure Link, equivalent to a secure email. Your options for Signature, Notary, and eNote will be greyed out, as this is not an eSign package.
- To add password protection, check the optional security box and enter a password. Please share it directly with the recipient(s) outside of this platform. *This password cannot be recovered by DocMagic personnel.*
- Click Advanced to access additional features, such as setting expiration dates or disabling recipient printing.



- Enter recipients in the To and Cc fields or use the dropdowns on the right to select email addresses. You can edit the auto-filled subject or add an optional message.
- You have the option to allow recipients to annotate the files you send. Recipients will receive an email similar to the Process Confirmation email generated by DocMagic Online, with options to access the files in DBK or PDF format. You can also send yourself a test copy.

Final Thoughts



- Click Print and Deliver to enter a recipient and street address and send a request Print Fulfillment Center.
- Right click on any selection to see the list of available actions (Print, View, etc.).
- Redundant controls for the top ribbon of icons can be found in the file menu.