



Integra

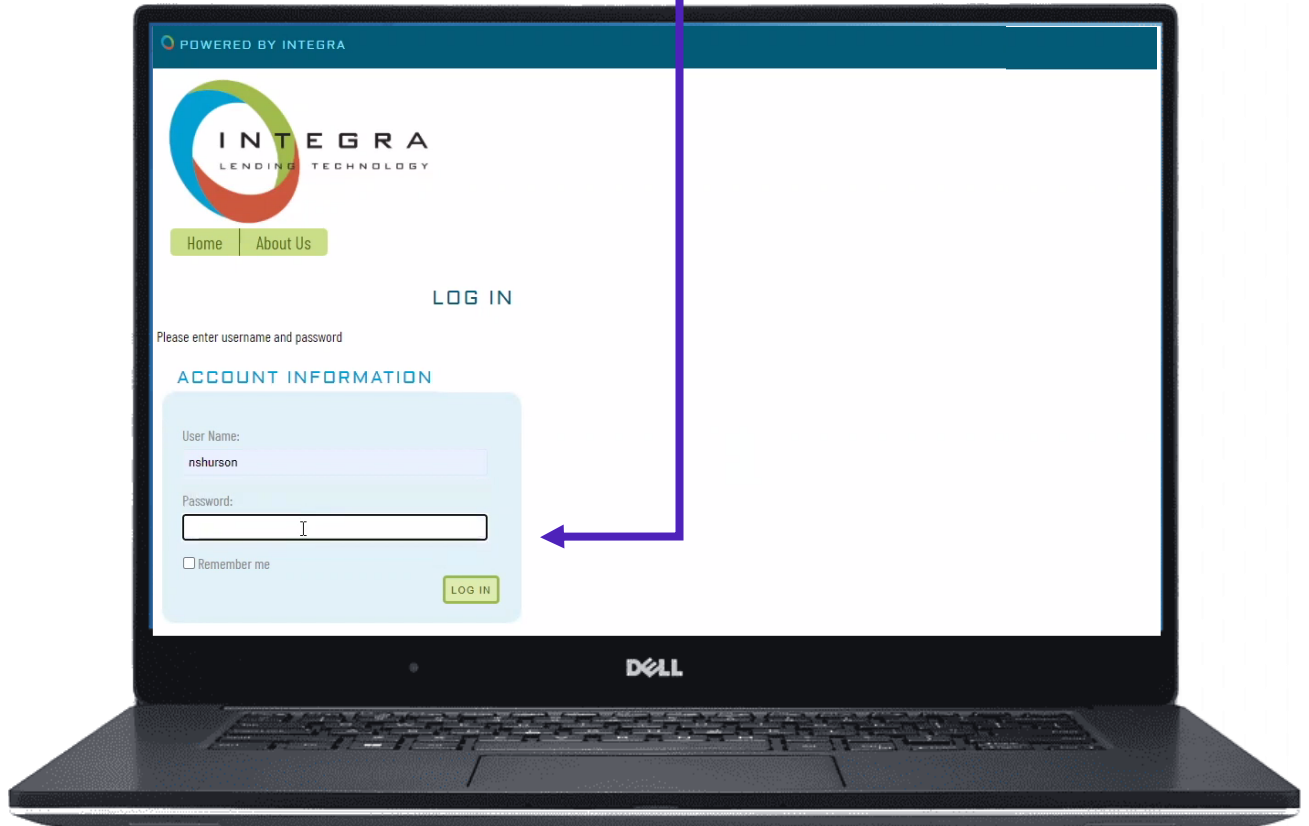
Seamless Integration
With

DocMagic

Integra

Getting Started

Login in with your Integra credentials.



Integra

Dashboard / Filter

You'll reach your pipeline. This filter function allows you to look at loans in certain statuses like Application allowing you to pick the packages from DocMagic that you want.

The screenshot displays the Integra dashboard interface. At the top, there are search and filter controls, including a search bar, 'SEARCH' and 'CLEAR' buttons, and an 'Advanced Search' link. Below these are radio buttons for 'All Loans', 'My Loans', and 'Recent Loans', along with 'ADD TO QUEUE' and 'STOP MONITORING' buttons. A 'Filter:' dropdown menu is open, showing a list of filter options. The 'Application' option is highlighted with a red box and a mouse cursor. A blue arrow points from the text box above to this 'Application' option.

FIRST NAME	APP DATE	STATUS	LOCK EXPIRE	PRODUCT	LOAN AMOUNT	RATE	NOTE DATE	STREET ADDRESS	CITY	STATE	DATE
	2/14/2020	CommREApp		CommMtgFix	\$2,030,000.00	7.000%	2/28/2020	12346 Main St	FRANKLIN	TN	
Garth		ProcuW		US30 Yr Fix	\$1,125,000.00	3.750%		TO BE DETERMINED	FRANKLIN	TN	
Robert	1/8/2016	ConREApp		Step Rate 6-1	\$1,000,000.00	3.250%	2/28/2016	123 Elm Street	DALLAS	TX	
	1/5/2016	ComClose		UPB	\$1,000,000.00	3.250%	1/20/2016	1200 Belt Line Road	GARLAND	TX	
Andy	1/4/2021	ProcuW		30 Yr Fix	\$600,000.00	3.000%		4321 Cul de Sac ST	Someplace	HI	
	10/30/2015	ComClose		CommMtgFix	\$525,000.00	9.000%	11/30/2015	4217 State Street	THOUSAND OAKS	CA	
	7/30/2019	ComClose		BusFix	\$500,000.00	5.500%	8/15/2019	123 Farm Road	KENESAW	NE	
Jane	6/7/2021	Applic			\$400,000.00	0.000%		To be determined	PHOENIX	AZ	
Raymond		WithNoHMDA			\$400,000.00	0.000%	2/24/2021	1313 13th St	NASHVILLE	TN	
Larry		Applic			\$400,000.00	0.000%	11/5/2020	To be determined			
Nancy	8/17/2021	ProcuW		40FixIO	\$400,000.00	3.250%		2007 Brookfield Court	BRENTWOOD	TN	
	7/15/2019	CommREClos		CommMtgFix	\$382,550.00	5.500%	8/15/2019	5577 Knobb Hill Road	NASHVILLE	TN	
	8/20/2014	CommREClos		CommMtgFix	\$375,362.00	6.000%	9/1/2014	200 Main Street	SKIATOOK	OK	
New	3/1/2021	Applic		30 Yr Fix	\$370,000.00	3.000%	4/3/2021	To be determined			
ANDY	1/8/2018	ProcuW		3/1 ARM IO	\$368,000.00	4.125%	3/23/2018	41234 Elm Street	FALL RIVER	MA	
Bonnie	8/11/2016	Test	7/24/2019	30 Yr Fix	\$361,250.00	4.750%	7/31/2016	123 Main Street	FRANKLIN	TN	
Gomez	10/9/2019	Denied	12/8/2019	30 Yr Fix	\$360,000.00	4.000%	10/25/2019	2212 Mockingbird Lane	FRANKLIN	TN	
Louis	7/24/2018	ProcuW		30 Yr Fix	\$360,000.00	5.000%		To be determined			
My	8/17/2021	Applic			\$350,000.00	0.000%		To be determined	BRENTWOOD	TN	
Brian	11/29/2018	ProcuW		30 Yr Fix	\$340,000.00	4.500%	1/23/2019	123 Frosty Lane	MOUNT AIRY	NC	
Kristen	11/21/2019	Applic			\$320,000.00	0.000%		To be determined			8/23/2018



Integra

Dashboard / Search Bar

You can find a specific loan in the search bar here.



The screenshot shows the Integra dashboard search interface. At the top, there is a search bar highlighted with a green box, followed by 'SEARCH' and 'CLEAR' buttons. Below the search bar are radio buttons for 'All Loans', 'My Loans', and 'Recent Loans', along with 'ADD TO QUEUE' and 'STOP MONITORING' buttons. A 'Filter: (none)' dropdown is also visible. The main part of the dashboard is a table with the following columns: FIRST NAME, APP DATE, STATUS, LOCK EXPIRE, PRODUCT, LOAN AMOUNT, RATE, NOTE DATE, STREET ADDRESS, CITY, STATE, and ZIP CODE. The table contains 20 rows of loan data.

FIRST NAME	APP DATE	STATUS	LOCK EXPIRE	PRODUCT	LOAN AMOUNT	RATE	NOTE DATE	STREET ADDRESS	CITY	STATE	ZIP CODE
	1/15/2018	ComClose		BusLOC	\$101,000.00	6.500%	3/20/2018	123 Main St	BOERNE	TX	78006
	7/30/2019	ComClose		BusLOC	\$100,000.00	6.000%	7/30/2020	123 Farm Road	WEST BEND	IA	50597
	7/30/2019	ComClose		BusFix	\$500,000.00	5.500%	8/15/2019	123 Farm Road	KENESAW	NE	68956
	2/10/2021	ComClose		BusFix	\$25,000.00	6.250%	2/15/2021	123 Farm Road	BUFFALO	KY	42716
		ComApp			\$000.00	0.000%		123 Farm Road	PARIS	TN	38242
	8/12/2015	ComUW		LOC Adj	\$250,000.00	5.000%	8/17/2015	To be determined			
	8/6/2019	ComClose		CommMtgVar	\$127,550.00	5.000%	8/7/2019	1234 Maple	GALLIPOLIS	OH	45631
	7/6/2017	ConREClose		LOC Adj	\$225,225.00	4.500%	8/8/2017	4567 Elm Street	LAFAYETTE	TN	37083
Gomez		Servicing			\$000.00	0.000%		To be determined			
Gomez	2/22/2017	Test	6/11/2015	30 Yr Fix	\$160,000.00	5.125%	5/25/2013	3535 West Road	FRANKLIN	TN	37067
Gomez	7/1/2014	ConApp		ConsInstFix	\$25,050.00	7.000%	7/2/2014	To be determined			
Gomez	10/9/2019	Denied	12/8/2019	30 Yr Fix	\$360,000.00	4.000%	10/25/2019	2212 Mockingbird Lane	FRANKLIN	TN	37067
	5/2/2021	ProcUW	10/13/2019	30 Yr Fix	\$100,000.00	5.000%	6/15/2021	123 Main	FRANKLIN	TN	37067
FFS		PreQual			\$296,000.00	0.000%		22	SPRING HILL	TN	37174
Louis	7/24/2018	ProcUW		30 Yr Fix	\$360,000.00	5.000%		To be determined			
Louis	9/28/2018	Denied		30 Yr Fix	\$140,000.00	0.000%		555 street	SPRING HILL	TN	37174
Amy	3/29/2018	ProcUW		VA30	\$223,080.00	4.250%		950 Canyon Avenue	CORPUS CHRISTI	TX	78408
Andy	1/4/2021	ProcUW		30 Yr Fix	\$600,000.00	3.000%		4321 Cul de Sac ST	Someplace	HI	02723



You can also put loans into your My Loans queue – this will help you focus on specific loans that you're working on.

The screenshot shows the 'My Loans' section of the Integra dashboard. At the top, there is an 'EXPORT TO EXCEL' button, a search input field, and 'SEARCH' and 'CLEAR' buttons. Below these are radio buttons for 'All Loans', 'My Loans' (which is selected), and 'Recent Loans'. To the right are 'ADD TO QUEUE' and 'STOP MONIT' buttons. The main content is a table with the following data:

FIRST NAME	APP DATE	STATUS	LOCK EXPIRE	PRODUCT	LOAN AMOUNT	RATE	NOTE DATE	STREET ADDRESS
New		Applic			\$000.00	0.000%	1/1/2022	To be determined
John	8/6/2021	Applic	12/26/2021	30 Yr Fix	\$141,900.00	3.625%	9/15/2021	2505 S Creek ST
John		Applic		30 Yr Fix	\$200,000.00	4.000%	4/29/2021	4545 Mu Drive
Test		Applic			\$000.00	0.000%	11/12/2021	To be determined



Integra

Choosing a Loan

Choose your loan by clicking on it.

All Loans My Loans Recent Loans

APP DATE	STATUS	LOCK EXPIRE	PRODUCT	LOAN AMOUNT	RATE	NOTE DATE
8/6/2021	Applic	12/26/2021	30 Yr Fix	\$141,900.00	3.625%	9/15/2021
5/14/2021	CommREClose		CommMtgFix	\$505,000.00	5.000%	6/24/2021
9/30/2021	ConREUW	1/7/2022	Fixed Portfolio	\$200,015.00	4.000%	10/29/2021
10/12/2021	ConApp		ConInstFix	\$15,065.00	7.000%	10/12/2021
9/1/2021	ConClose		ConInstFix	\$20,100.00	5.000%	9/2/2021
8/23/2021	ConREClose	9/30/2021	Fixed Portfolio	\$50,000.00	5.000%	9/14/2021
10/26/2021	ConREClose		HELOC	\$25,000.00	6.000%	11/17/2021
2/22/2017	Test	6/11/2015	30 Yr Fix	\$160,000.00	5.125%	5/25/2013
3/10/2017	ConREClose		Fixed Portfolio	\$65,000.00	4.750%	3/31/2017
	Applic			\$000.00	0.000%	1/1/2022

DELL



You'll see borrower information workflow on the left side, and real time loan information on the right.

The screenshot displays the Integra Loan Details interface. On the left is a 'WORKFLOW' menu with categories: LOANS, TOOLS, ADMINISTRATION, and UTILITIES. Under LOANS, 'DocMagic' is selected. The central area is titled 'DOCMAGIC DOCUMENTS' and contains a form with fields for Application, Package Type (LoanApplication), and a RELOAD DATA button. Below the form are buttons for APR CALCS and IMPOUNDS. On the right is a 'STATUS' panel with 'LOAN INFORMATION' details and a list of action buttons.

LOAN INFORMATION	
Loan Number	20210806001
View Only	False
Loan Amount	\$141,900.00
Total Loan Amount	\$141,900.00
Rate	3.625%
Term	360
PI Payment	\$647.14
LTV	86.000%
CLTV	86.000%
DTI	23.007%
FICO	773
Product	30 Yr Fix
Product Status	Valid
Application Date	8/6/2021
Est Close	9/15/2021
Lock Expire	12/26/2021
Note Date	9/15/2021
Loan Officer	Meghan Stein
Status	Apply

Buttons in the interface include: CHANGE STATUS, IMAGE DDCS, SMARTFEES, EXPORT MISMO 3.4 FILE, NOTIFICATIONS, CREATE ASSOC LOAN, AUDIT FIELDS, LOAN REVIEW, and DOCMAGIC.



Click the Change Status button to move the loan through the system.

The screenshot displays the 'DOCMAGIC DOCUMENTS' section of the Integra Loan Details interface. The main area contains a form with the following fields:

- Application: [Dropdown]
- Package Type: LoanApplication [Dropdown]
- RELOAD DATA [Button]
- DSI_CONV ALL FIXED LOANS [Dropdown]
- (none) [Dropdown]
- (none) [Dropdown]
- 224006 [Dropdown]
- Password: [Input field]

Below the form, there are buttons for 'APR CALCS' and 'IMPOUNDS'. A 'Status Messages' box contains the text: 'Updated Transfer To options from DocMagic'.

On the right side, the 'STATUS' section includes 'LOAN INFORMATION' with the following data:

Loan Number	20210806001
View Only	False
Loan Amount	\$141,900.00
Total Loan Amount	\$141,900.00
Rate	3.625%
Term	360
PI Payment	\$647.14
LTV	86.000%
CLTV	86.000%
DTI	23.007%
FICO	773
Product	30 Yr Fix
Product Status	Valid
Application Date	8/6/2021
Est Close	9/15/2021
Lock Expire	12/26/2021
Note Date	9/15/2021
Loan Officer	Meghan Stein
Status	Applic

Below the loan information, there is a 'CHANGE STATUS' button highlighted with a green box. Other buttons include 'IMAGE DDCS', 'SMARTFEES', 'EXPORT MISMO 3.4 FILE', 'NOTIFICATIONS', 'CREATE ASSOC LOAN', 'AUDIT FIELDS', 'LOAN REVIEW', and 'DOCMAGIC'.

On the left side, the 'WORKFLOW' menu is visible, with 'DocMagic' highlighted by a green box and an arrow pointing to the 'APR CALCS' and 'IMPOUNDS' buttons.

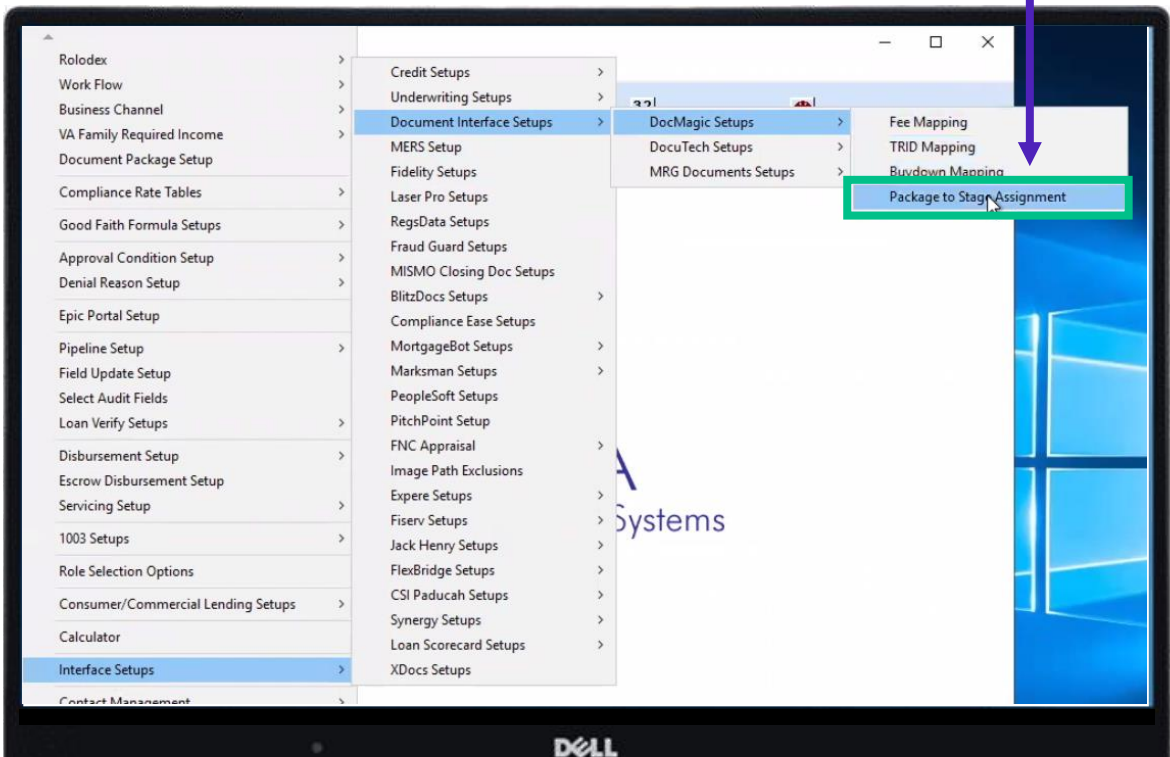
You can access DocMagic functions through the button on the left.



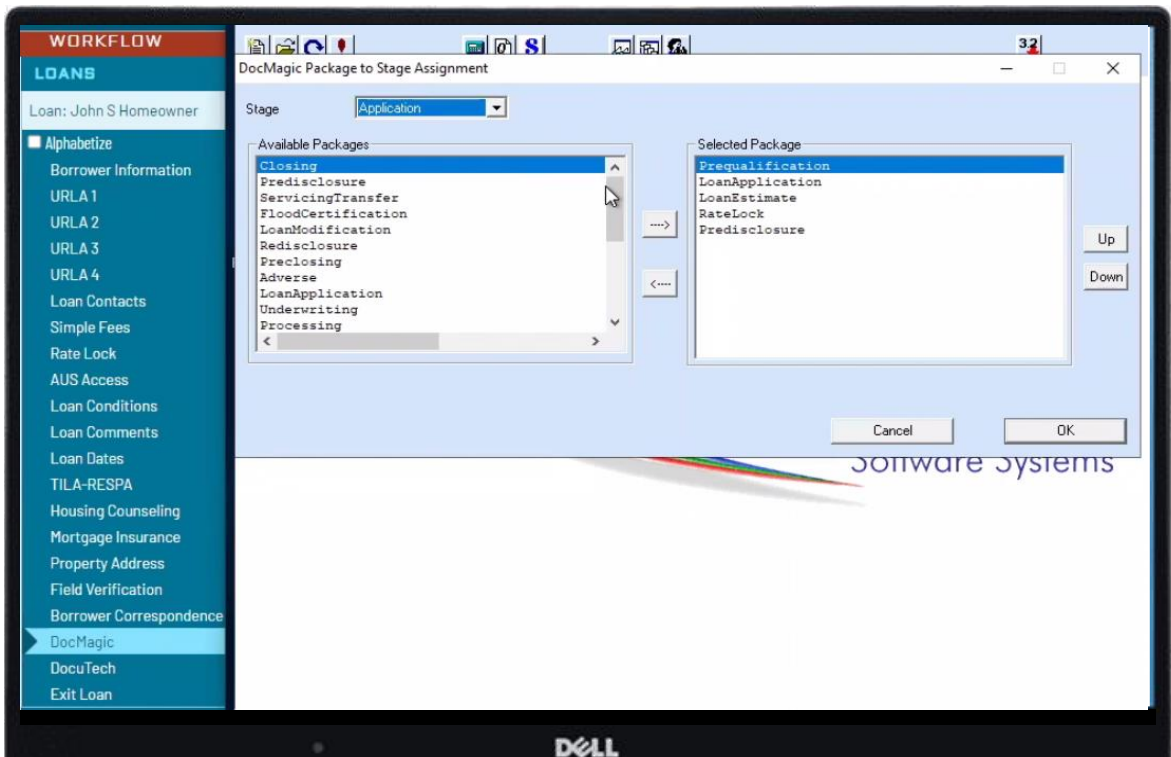
Integra

DocMagic

Navigate through the menus by going to Interface Setups → Document Interface Setups → DocMagic Setups → Package to Stage Assignment



You'll get to this page where you can select the Loan Stage.



In this case, we're demonstrating in the Application Stage. You've got the option to choose all stages of the loan.



These options here let you check the audit for the loan package, including your section 32 analysis, APR calcs, proof sheet, and audit page.

WORKFLOW

- URLA 1
- URLA 2
- URLA 3
- URLA 4
- Loan Contacts
- Flood Cert. Information
- Simple Fees
- Fees
- Rate Lock
- TILA-RESPA
- Property Address
- High Cost Detail
- Qualified Mortgage
- Loan Conditions
- Processing
- Underwriting Qualify
- AUS Access
- Desktop Underwriter
- Loan Product Advisor
- Loan Delivery
- Loan Disclosure
- Loan Comments
- Loan Dates
- Field Verification
- Mortgage Insurance
- Compliance Ease
- DRIVE Request
- Appraisal Firewall
- Fraud Guard
- Escrow Holdback

WebSheet Number: 1229

Loan Stage

Plan Code

Alt Lender Code

Transfer Code

Account ID

Loan is a HELOC

Soft Prepay Penalty Months

AUDIT DATA

- Review Audit Data
- PROOF SHEET
- SEC 32 CALCS
- MESSAGES

SUBMIT PREVIEW

SUBMIT DATA Send to E-Sign

Loan Detail Report

DocMagic

Loan Number: 20210806001 File ID: 1229

Borrower Name: John S Homeowner, Mary Homeowner Client Number: 234006

Property Address: 2505 S Creek ST, BRENTWOOD TN 37027 Date of Report: 12/09/2021

Transaction Details | Data Validation | Compliance Audit

DETAILS

LENDER INFO

Lender Name: INTEGRA SOFTWARE SYSTEMS, LLC Transfer To:

Loan Program: ALL FIXED LOANS (DSI_CONV)

LOAN IDENTIFIERS

Loan Number: 20210806001	FHA/VA Case:	MERS #:
Loan Purpose: Purchase	Loan Type: Conventional	Origination Type: Lender
FHA Section:	MIC #:	
Loan Rep: Meghan Stein	Broker Name:	Branch: *Tennessee Bank

IMPORTANT DATES

Application Date: 08/06/2021	Cancel Date:	CD/Re-Disc Send Date: 12/09/2021
Document Date: 09/15/2021	Disbursement Date: 09/15/2021	CD/Re-Disc Method:
Closing Date: 09/15/2021	Est. Avail. Through: 08/23/2021	CD/Re-Disc Recv. Date:
Signing Date:	Pre-Z Send Date: 08/09/2021	

RATE LOCK

Rate Lock Date: 09/22/2021	Rate Avail. Through: 12/06/2021	Lock Prior to Close:
Rate Lock Days: 95 days	Time: 12:00 AM	Last Disclosed APR: 3.695%

BORROWERS/SELLERS

BORROWERS

Borrower Name: John S Homeowner

Borrower Type: Individual Phone:

Social Security Number: XXX-XX-5000 Email: nshurson@integraisntech.com

Clicking Proof Sheet brings up your DocMagic Loan Detail report.



When you submit data, it sets all your bases for your tolerance testing, but clicking Submit Preview allows you to look at the data first.

The screenshot displays the 'DOCMAGIC DOCUMENTS' interface. On the left, there is a sidebar with fields: 'Worksheet Number: 129', 'Loan Stage', 'Plan Code', 'Alt Lender Code', 'Transfer To:', 'Account ID:', and 'Soft Prepay Penalty Months' (set to 0). The main area contains several dropdown menus: 'Application', 'Package Type' (set to 'LoanApplication'), 'DSI_CONV ALL FIXED LOANS', '(none)', '(none)', and '224006'. There is a 'RELOAD DATA' button and a 'Password' field with a masked input. Below the form, there are buttons for 'AUDIT DATA', 'Review Audit Data', 'PROOF SHEET', 'SEC 32 CALCS', 'MESSAGES', 'APR CALCS', 'IMPOUNDS', 'SUBMIT PREVIEW', 'SUBMIT DATA', 'Send to E-Sign', and 'VIEW/PRINT DOCS'. A 'Status Messages' box on the right contains the text: 'Submitting information to DocMagic for auditing. Audit Complete. Results are ready for review.' A purple arrow points from the text box above to the 'SUBMIT PREVIEW' button. Another purple arrow points from the text box below to the 'Send to E-Sign' and 'VIEW/PRINT DOCS' buttons.

Send to E-sign sends the package out to the borrower for signature. You can also View or Print Docs here.



For the closing package, you'll have the option to select all Hybrids and Total eClose here.

The screenshot displays the DocMagic Documents interface. On the left, there is a sidebar with fields for Worksheet Number (1229), Loan Stage, Plan Code, Alt Lender Code, Transfer To, Account ID, and a checkbox for 'Loan is a HELOC'. Below these are buttons for 'AUDIT DATA', 'Review Audit Data', 'PROOF SHEET', 'SEC 32 CALCS', 'MESSAGES', 'SUBMIT PREVIEW', 'SUBMIT DATA', and 'Send to E-Sign'. The main area is titled 'DOCMAGIC DOCUMENTS' and contains a 'Package Type' dropdown set to 'LoanApplication', a 'RELOAD DATA' button, and a 'D LOANS' dropdown. A dropdown menu is open under 'Application', listing 'Application', 'Closing', 'Disclosure', 'PostClosing', 'PreClosing', and 'Verification'. The 'Closing' option is highlighted. Below this is a 'Password' field with a checkbox and a masked input. On the right, there is a 'STATUS' section with 'LOAN INFORMATION' details, a 'CHANGE STATUS' button, and a list of buttons including 'IMAGE DOCS', 'SMARTFEES', 'EXPORT MISMO 3.4 FILE', 'NOTIFICATIONS', 'CREATE ASSOC LOAN', 'AUDIT FIELDS', 'LOAN REVIEW', and 'DOCMAGIC'. A 'Status Messages' box shows 'Updated Transfer To options from DocMagi'. A purple arrow points from the 'Closing' option in the dropdown to the 'IMAGE DOCS' button.

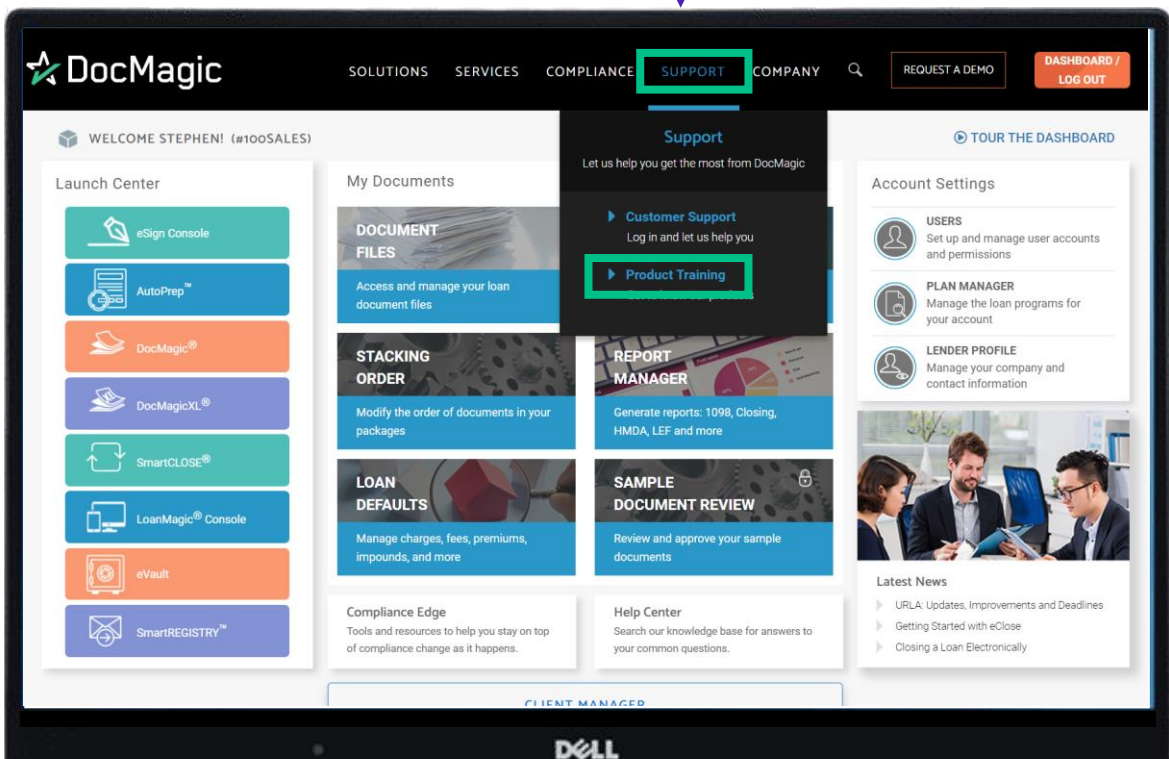
Clicking on the Image Docs button will allow you to see return sign documents in Integra.



Integra

Product Training Page

To view the Settlement Agent, Borrower, and Notary Experiences, and Total eClose through DocMagic, check out our Product Training Page.



Once on the page, scroll down and click on the Total eClose icon toward the bottom of the page.

