DocMagic

Integra

Seamless Integration
With

DocMagic

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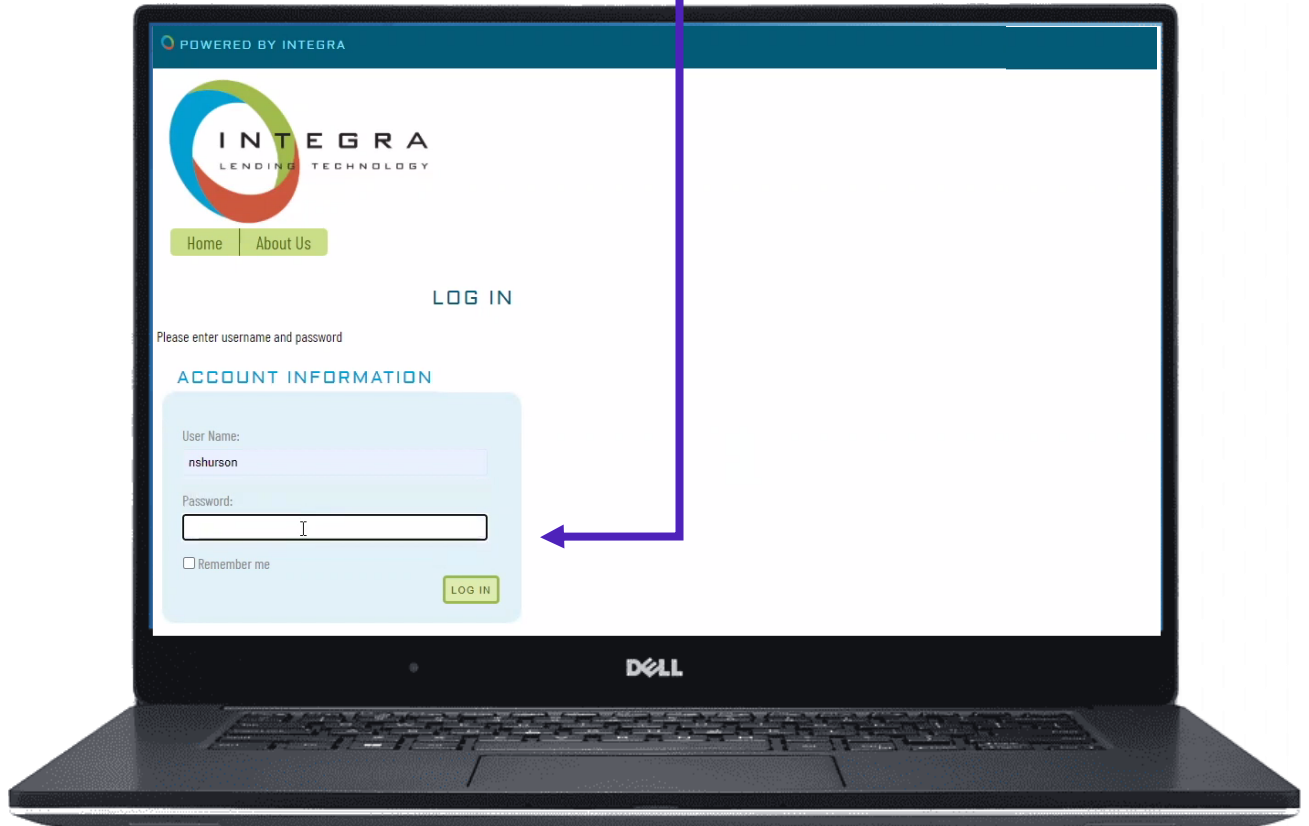
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You'll reach your pipeline. This filter function allows you to look at loans in certain statuses like Application allowing you to pick the packages from DocMagic that you want.

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Dashboard / Search Bar

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

	SEARCH	CLEAR								Advanced Search	
	● All Loans ○ My Loans ○ Recent Loans				ADD TO QUEUE	STOP MONITORING			Filter:	(none)	

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

DELL

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

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

EXPORT TO EXCEL

SEARCH CLEAR

○ All Loans ● My Loans ○ Recent Loans

ADD TO QUEUE STOP MONIT

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	CommREClos		CommMtgFix	$505,000.00	5.000%	6/24/2021
9/30/2021	ConREUW	1/7/2022	Fixed Porfolio	$200,015.00	4.000%	10/29/2021
10/12/2021	ConApp		ConsInstFix	$15,065.00	7.000%	10/12/2021
9/1/2021	ConClose		ConsInstFix	$20,100.00	5.000%	9/2/2021
8/23/2021	ConREClose	9/30/2021	Fixed Porfolio	$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 Porfolio	$65,000.00	4.750%	3/31/2017
	Applic			$000.00	0.000%	1/1/2022

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Loan Details

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

Loan Details

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

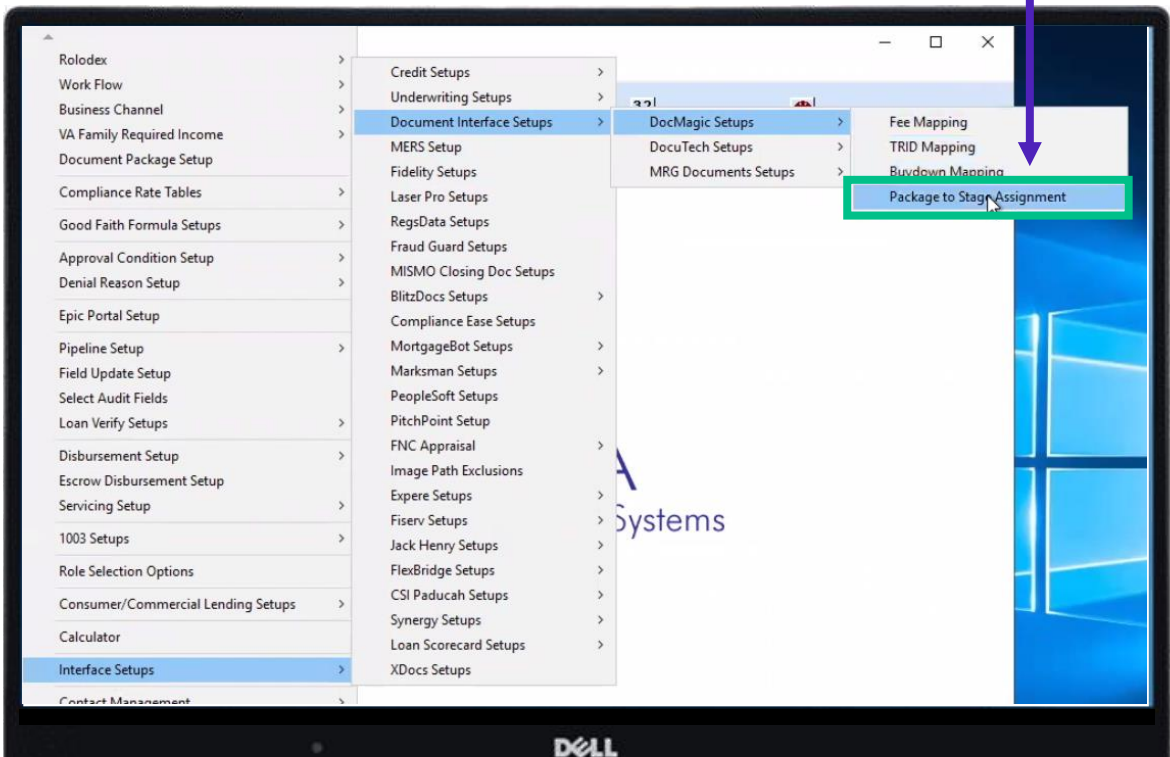

You can access DocMagic functions through the button on the left.
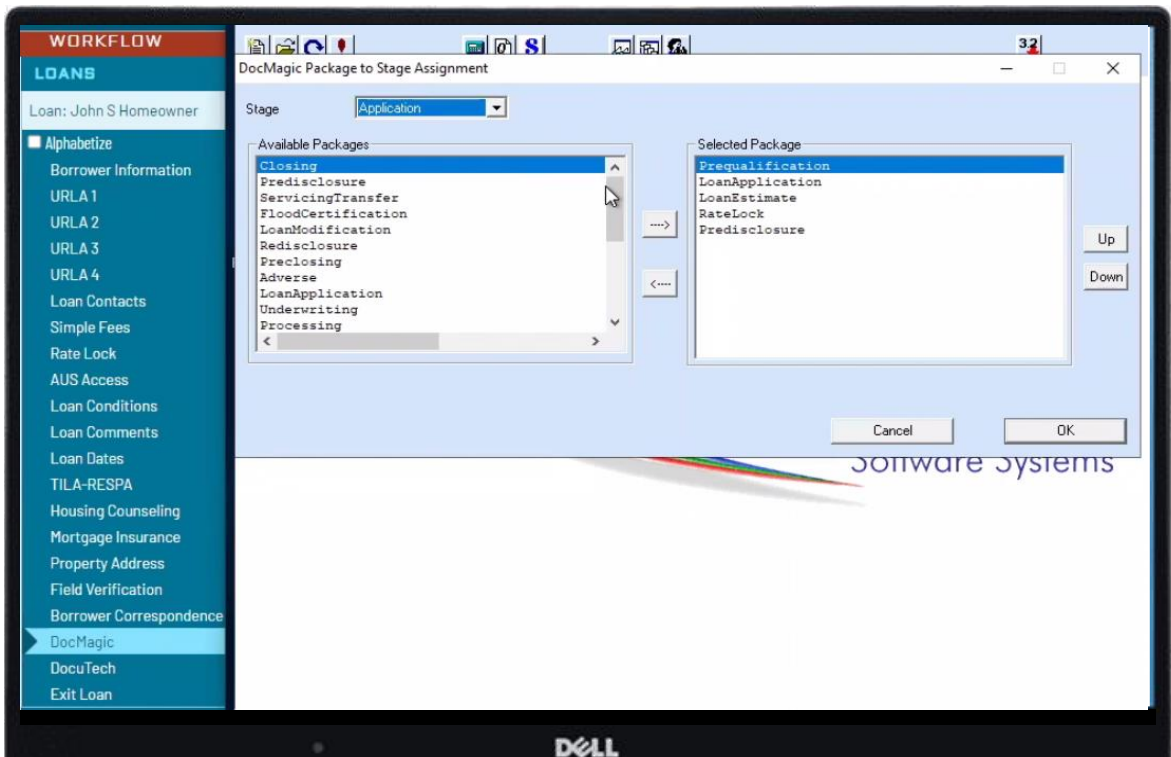
Navigate through the menus by going to Interface Setups → Document Interface Setups → DocMagic Setups → Package to Stage Assignment

Loan Stage

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.

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

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.

DOCMAGIC DOCUMENTS

Websheet Number: 129

Loan Stage	Application ▼	Package Type LoanApplication ▼ RELOAD DATA
Plan Code	DSI_CONV ALL FIXED LOANS ▼	
Alt Lender Code	(none) ▼	
Transfer To:	(none) ▼	
Account ID:	224006 ▼	Password ☐ ••••••••••

☐ Loan is a HELOC

Soft Prepay Penalty Months 0

AUDIT DATA

Status Messages

Review Audit Data

PROOF SHEET   APR CALCS

SEC 32 CALCS   IMPOUNDS

MESSAGES

Submitting information to DocMagic for auditing.
Audit Complete. Results are ready for review.

SUBMIT PREVIEW

SUBMIT DATA   ☐ Send to E-Sign   VIEW/PRINT DOCS

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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.

DOCMAGIC DOCUMENTS

Websheet Number: 1229

Loan Stage

Plan Code

Alt Lender Code

Transfer To:

Account ID:

☐ Loan is a HELOC

Soft Prepay Penalty Months   0

Dropdown:
- Application
- Closing
- Disclosure
- PostClosing
- PreClosing
- Verification

D LOANS

Package Type   LoanApplication ▼   RELOAD DATA

Password   ☐   •••••••••••

AUDIT DATA

Review Audit Data

PROOF SHEET   APR CALCS

SEC 32 CALCS   IMPOUNDS

MESSAGES

SUBMIT PREVIEW

SUBMIT DATA   ☐ Send to E-Sign   VIEW/PRINT DOCS

Status Messages

Updated Transfer To options from DocMagi

STATUS
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	ProcUW

CHANGE STATUS

IMAGE DOCS

SMARTFEES

EXPORT MISMO 3.4 FILE

NOTIFICATIONS

CREATE ASSOC LOAN

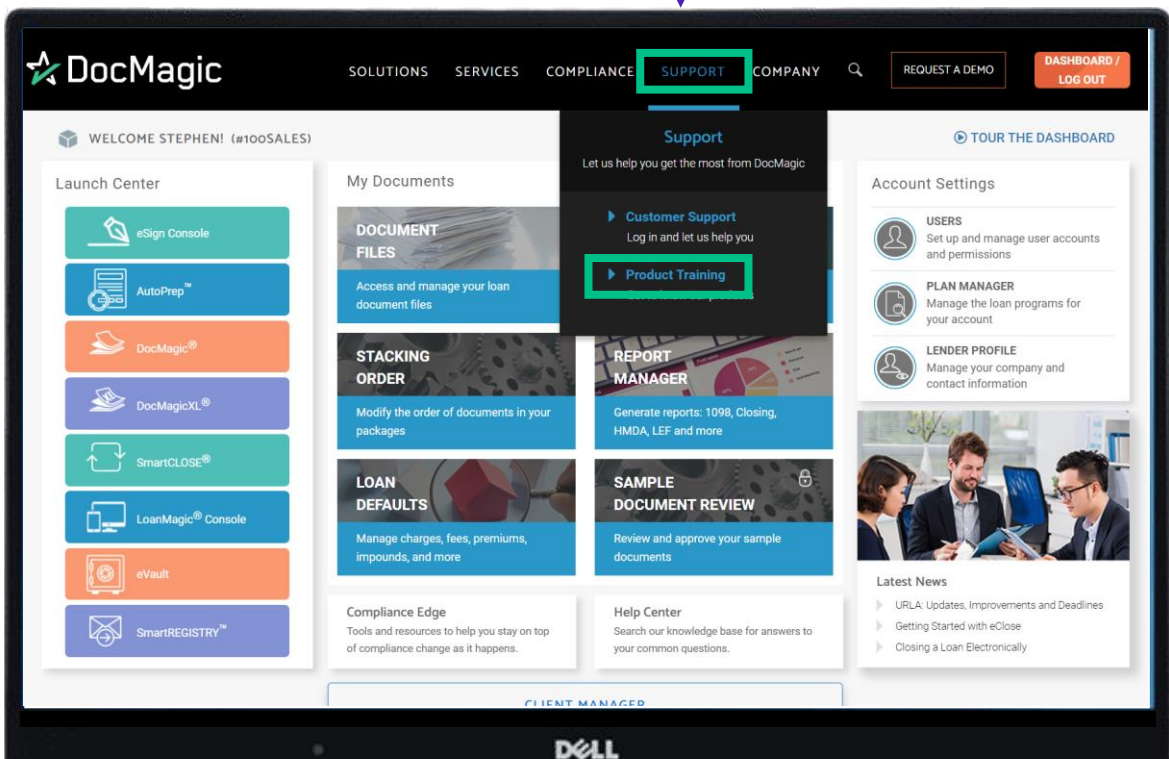AUDIT FIELDS

LOAN REVIEW

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

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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.