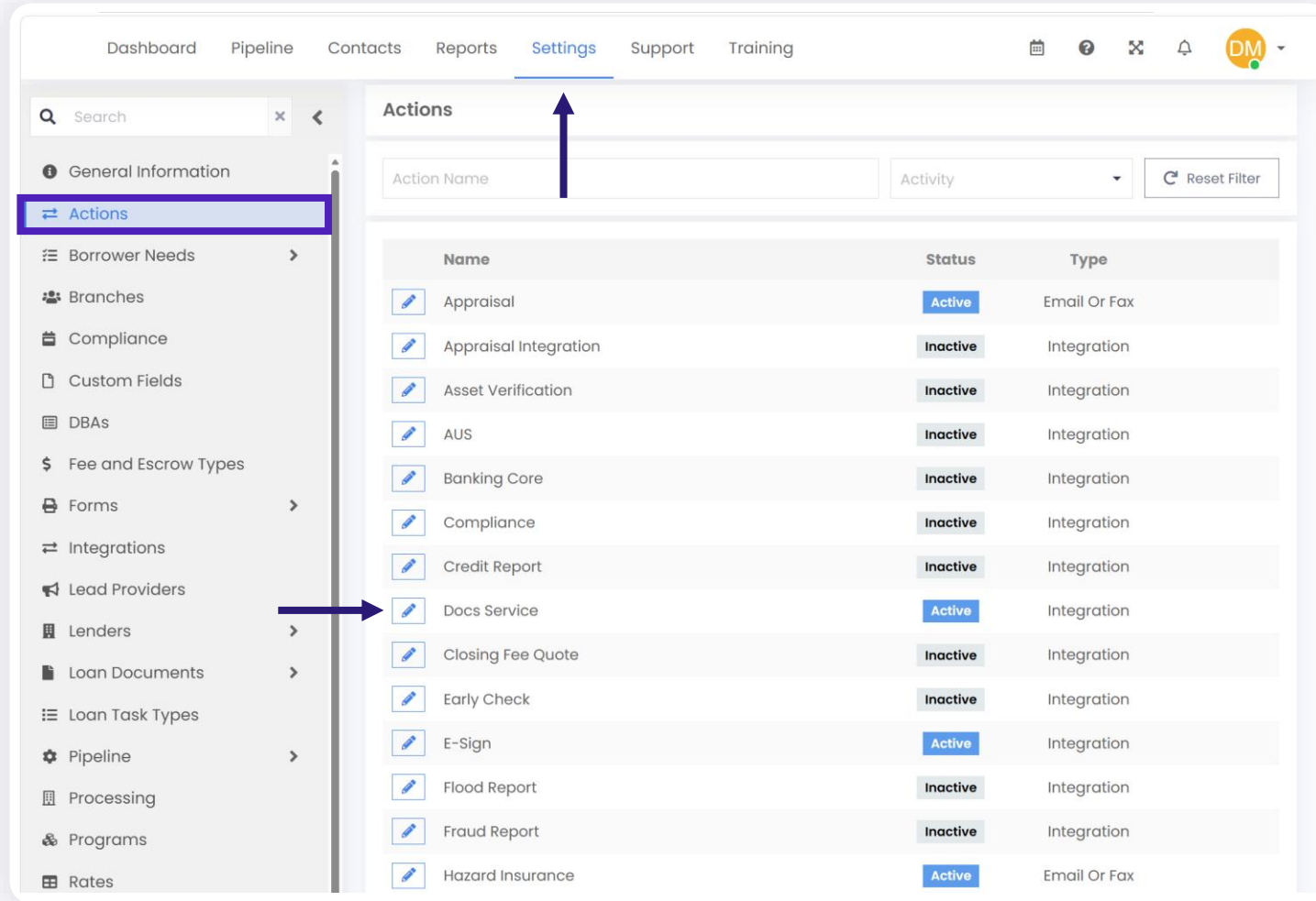


LendingPad – DocMagic Integration

User Guide – 2026 Revision

Before You Begin – DocMagic Credentials



- Before you begin, confirm that valid DocMagic credentials have been entered in LendingPad.
- You may need LendingPad administrative privileges to complete these steps.
- From Settings, select Actions. Locate Docs Service, then click on the Pencil icon.

Before You Begin – DocMagic Credentials

The screenshot shows the 'Manage Action - Docs Service' page in the DocMagic interface. The left sidebar contains a search bar and a list of navigation items: General Information, Actions (highlighted), Borrower Needs, Branches, Compliance, Custom Fields, DBAs, Fee and Escrow Types, Forms, Integrations, Lead Providers, Lenders, Loan Documents, Loan Task Types, Pipeline, Processing, Programs, and Rates. The main content area has tabs for 'General Information' and 'Contacts' (selected). The 'Contacts' tab shows a 'Contact Name' field, a 'Status' dropdown, and a 'DocMagic' checkbox which is checked. To the right of the 'DocMagic' checkbox are three input fields: 'Username', 'Password', and 'Code', each with a masked password field and an eye icon to toggle visibility. A blue arrow points to the 'Contacts' tab, and another blue arrow points to the 'DocMagic' checkbox.

- Select Contacts, then expand the DocMagic options.
- Enter the DocMagic username and password, then enter the DocMagic Account ID in the Code field.
- The credentials entered in LendingPad determine the account used to create transactions.

Before You Begin – Plan Codes

The image displays three overlapping screenshots of the DocMagic web application interface. The leftmost screenshot shows the 'Settings' menu with 'Programs' highlighted. The middle screenshot shows the 'Programs' list with a blue arrow pointing to the 'Conforming 30 Yr Fixed C30' program. The rightmost screenshot shows the 'General' edit form for this program, with the 'Code' field set to 'DSI_CONV' and highlighted by a purple box.

Programs List:

Name
Conforming 10 Yr Fixed C10
Conforming 15 Yr Fixed C15
Conforming 20 Yr Fixed C20
Conforming 30 Yr Fixed C30
Conforming 30 Yr Fixed C30
Conforming 5 Yr ARM C 5/1 ARM
Conforming 7 Yr ARM C 7/1 ARM
Conforming HB 15 Yr Fb CH15
Conforming HB 30 Yr Fb CH30
FHA Conforming 15 Yr Fb FHA C15

General Edit Form:

Name	Conforming 30 Yr Fixed
Short Name	C30
Consumer Friendly Name	Consumer Friendly Name
Pricing Margin	0.000%
Lock Per Day Fee	0.000%
Code	DSI_CONV
Loan Type	Conventional
Custom Term	☐
Rate Type	Fixed
Amortization Term	360
Amortization Due	360
Interest Only Term	0
Amortization Period Type	Monthly
Program Type	Conforming
AUS Type	AUS Type
Interest Calculation Days Type	365 days
Loan Credit Score Calculation Type	Middle Or Lower Then Lowest
Partial Payment Type	No Partial Payment Allowed
Qualify Payment Type	Principal And Interest
APR Actuarial Method Type	Do Not Extend Term By Odd D...

- Each applicable LendingPad program must be associated with its corresponding DocMagic plan code.
- First, confirm that the plan code has been added to your DocMagic account through the [Plan Manager](#).
- Go back to LendingPad. Select Settings, then Programs. Locate the corresponding program, such as a 30-year fixed.
- Click on the pencil icon to edit and enter the applicable DocMagic plan code in the Code field. Save your changes.
- You may need LendingPad administrative privileges to complete these steps.

Preparing a Loan for Document Generation

Dashboard Prospect **#R000005 / Tom R. Demo ...** **Purchase** Primary Residence Loan Amount: \$400,000 LTV: 80.00% Credit Score: -

Rate: - DT: 32.47% / 33.36% Compliance

TOM R. DEMO BORROWER

Menu Shortcuts

Loan and Property

Borrowers Financials Additional Data Loan Dates Scenario Overview Borrower Needs Actions UW / Conditions Documents Tasks 0/0 Audit

Loan and Property

Loan Information Property Information Title Information

LOAN INFORMATION

Purpose: Purchase

Appraisal Value: \$550,000 Purchase Price: \$500,000

Down Payment Amount: 20.00% \$100,000 Loan Amount: \$400,000

Loan Type: Conventional → Conforming 30 Yr Fixed

Note Rate: 0% Credit Score: 0

Other Financing: No Escrow Waiver: No

AUS Type: AUS Type

80.00% LTV 80.00% CLTV 80.00% HCLTV

PROPOSED HOUSING EXPENSE

First Mortgage (P&I)	\$1,111.11
Subordinated Lien (P&I)	\$0.00
Hazard Insurance	\$150
Supplemental Insurance	\$0.00
Property Taxes	\$200.00
Mortgage Insurance	\$0
HOA	\$0.00
Other	\$0.00
Total Amount	\$1,461.11

DETAIL OF TRANSACTION

a. Purchase Price	\$500,000
b. Alterations	\$0.00
c. Land	\$0.00
d. Refinance	\$0.00
e. Estimated Prepaid Items	\$0.00
f. Estimate Closing Cost	\$0.00
g. PMI, MIP, Funding Fee	\$0.00

- Open the loan from your pipeline or dashboard.
- On the Loan and Property screen, select the appropriate program in the loan information section. *Confirm that the appropriate DocMagic plan code has been mapped before proceeding.*
- Before requesting a document package, please also confirm that a loan officer has been assigned, and that an estimated closing date has been entered.

Accessing DocMagic From The Loan

The screenshot displays the LendingPad interface for a loan with prospect #R000005 / Tom R. Demo. The top navigation bar includes links to Dashboard, Prospect, and various loan details like Purchase, Primary Residence, and Loan Amount (\$400,000). A left sidebar menu lists sections such as Loan and Property, Borrowers, Financials, and Actions. The 'Actions' menu item is highlighted with a blue box and a blue arrow pointing to the 'Send' button in the 'System Actions' section. This button is labeled 'Send Docs Service'. A modal window titled 'Send Docs Service Request' is open, showing a dropdown for 'Contact' set to 'DocMagic', a dropdown for 'Package Type' set to 'Pre Disclosure', and a radio button selection for 'Send to E-Sign' with 'No' selected. At the bottom of the modal, there are buttons for 'Send Request' and 'Cancel'. Below the modal, other actions like 'Send E-Sign' and 'Send Credit Report' are visible, with a note indicating 'Action is inactive. Please contact system'.

- DocMagic is available in the Docs Services section of LendingPad.
 - Actions → Doc Services → Send
- Select DocMagic as the Contact.
- Select the package type and choose whether to send the package for eSign.
 - eSign enabled packages can be managed in DocMagic's [eSign Console](#).

Review Results – Success

The screenshot shows the LendingPad interface for a loan package generation. The top navigation bar includes a dashboard, prospect information (#R000005 / Tom R. Demo), and loan details (Purchase, Primary Residence, Loan Amount: \$400,000, LTV: 80.00%, Credit Score: -, Rate: -). The left sidebar contains various navigation options, with 'Actions' highlighted. The main area displays 'System Actions' with a list of successful actions, including 'Send Docs Service' and 'Request' actions. A 'Request' action is expanded, showing details like 'Contact: DocMagic', 'Package Type: Pre Disclosure', and 'Response: Report Document'. A 'Response Description' shows 'Success'. A 'Loan Estimate' document is also visible, detailing loan terms, projected payments, and costs at closing.

System Actions

Action	Date	Status
Send Docs Service	09/08/2026 3:25 PM PDT	Success
	02/13/2026 9:17 AM PST	Success

Request

Contact: DocMagic
WebSheet ID: R000005
Package Type: Generated By
Pre Disclosure: Doc Magic

Response

Reference Identifier: R000005
Report Document: DisclosureDocument_20260213-171803065.pdf

Response Description

Code: Success

Loan Estimate

DATE ISSUED: 9/11/2025
APPLICANTS: Sales Demo Borrower
PROPERTY: Property Avenue, Corona, CA 92881
SALE PRICE: \$500,000

Loan Terms

Loan Amount	Interest Rate	Monthly Principal & Interest	Prepayment Penalty	Balloon Payment
\$400,000	0%	\$1,111.11	YES	NO

Projected Payments

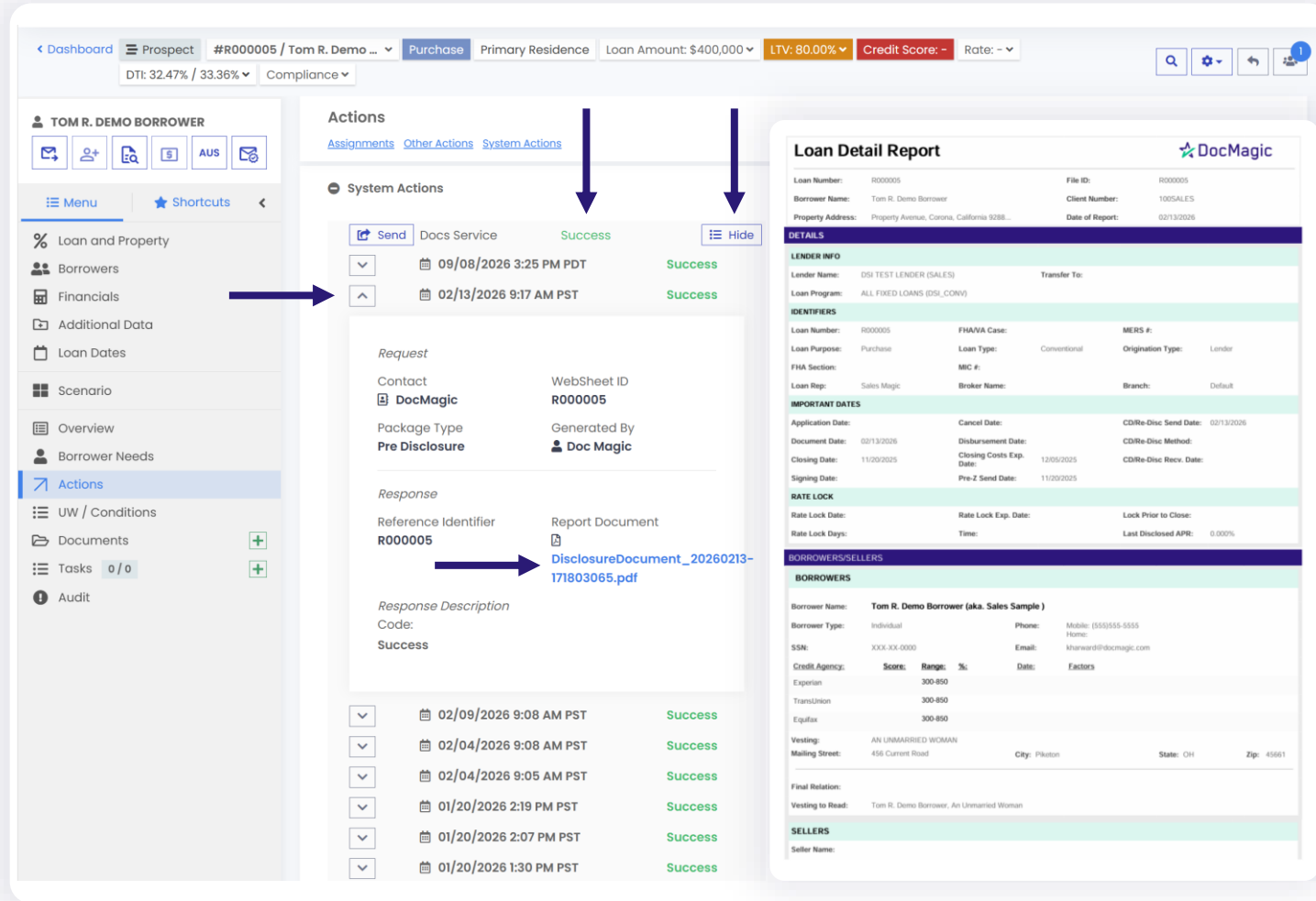
Payment Calculation	Years 1-30
Principal & Interest	\$1,111.11
Mortgage Insurance	+
Estimated Escrow	+
Estimated Total Monthly Payment	\$1,461

Costs at Closing

Estimated Closing Costs	Estimated Cash to Close
\$0	\$100,000

- If the package is generated, LendingPad will display a **Success** message.
- Click View to expand the list of requests (denoted as "Hide" in the image).
- Click on the dropdown to expand the request details.
- Use the package link to open the generated package.

Review Results – Success



The screenshot displays the LendingPad interface for a loan with ID #R000005. The 'Actions' tab is active, showing a list of system actions. The 'Send Docs Service' action is highlighted, showing a 'Success' status. A blue arrow points from the 'Send' button to the 'Success' status. Another blue arrow points from the 'Success' status to the 'Request' section, which shows a 'Request' for a 'Pre Disclosure' package. A third blue arrow points from the 'Request' section to the 'Response' section, which shows a 'Response' with a 'Success' status. The 'Response' section also shows a 'Report Document' link.

System Actions

Action	Status
Send Docs Service	Success
09/08/2026 3:25 PM PDT	Success
02/13/2026 9:17 AM PST	Success

Request

Contact: DocMagic
WebSheet ID: R000005
Package Type: Pre Disclosure
Generated By: Doc Magic

Response

Reference Identifier: R000005
Report Document: DisclosureDocument_20260213-171803065.pdf
Response Description: Success

Response Description

Success

- LendingPad does not allow you to review the Loan Detail Report or preview the document package before the request is processed.
- After processing, the Loan Detail Report appears at the beginning of the generated package.
- For eSign-enabled packages, the Loan Detail Report is not sent to recipients.

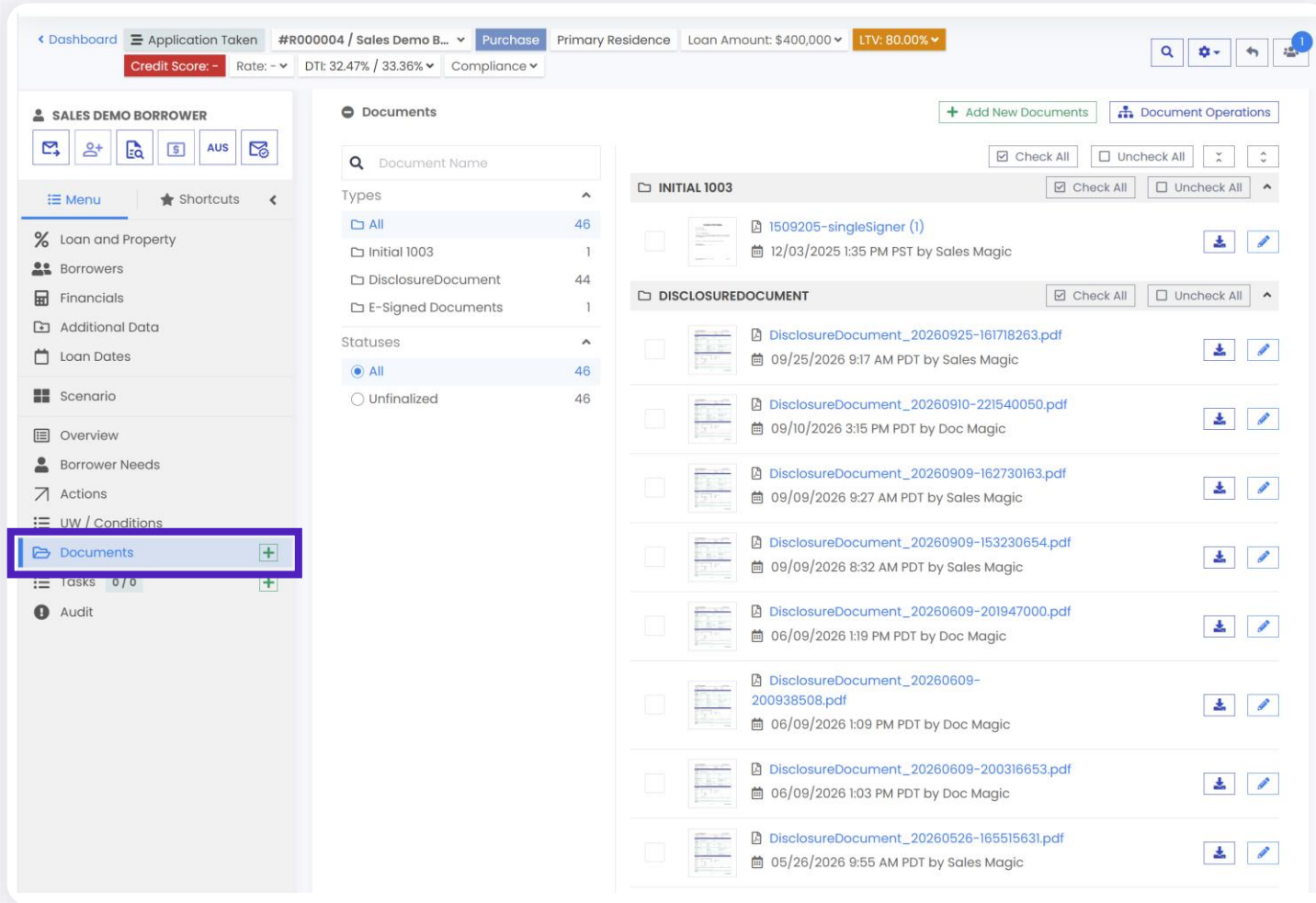
Review Results – Error

The screenshot displays the LendingPad interface for a prospect named Tom R. Demo. The top navigation bar includes tabs for Dashboard, Prospect, and Purchase, along with various filters like Loan Amount, LTV, Credit Score, and Rate. A left sidebar lists navigation options such as Menu, Shortcuts, Loan and Property, Borrowers, Financials, Additional Data, Loan Dates, Scenario, Overview, Borrower Needs, Actions, UW / Conditions, Documents, Tasks, and Audit. The main content area shows a list of actions, with a modal window open for a specific request. The modal window displays the following information:

- Request**
 - Contact: DocMagic
 - WebSheet ID: R000004
 - Package Type: Pre Disclosure
 - Generated By: Sales Magic
- Response**
 - View Report Document: [View Report Document](#)
 - Response Description**
 - Code: **Failure**
 - Description: **# Fatal. # No Plan Code.**

- When you submit a package request, DocMagic runs a compliance audit. If the audit returns fatal errors, LendingPad displays an **Error** message, and the package is not generated.
- To correct the request, start by locating the failed Doc Service record. Expand the record and review the message(s). Correct the corresponding loan data or configuration and resubmit the request.
- Common fatal error causes include:
 - No Loan Officer Assigned
 - No Estimated Closing Date Entered
 - Invalid Plan Code (or none selected)
 - User Permissions in LendingPad

Managing Generated Documents



- Previously generated packages are available in the Documents section on the left.
- Completed eSign packages are also returned to this section.
 - All required participant signatures must be collected before DocMagic considers an eSign package complete.

Frequently Asked Questions

Does LendingPad support eSign?

Yes. You can manage eSign requests in the [eSign Console](#) on our website.

Do the eSigned documents get returned to LendingPad?

Completed eSign documents will be returned to LendingPad after all required signatures have been collected. Account configuration may affect this process. Contact DocMagic Technical Support for assistance.

Does LendingPad support Total eClose?

LendingPad currently supports Hybrid 1 eClosings with a paper note and paper notarization.

Can I request UCD directly from LendingPad?

Yes.

Can I get my documents back as a DBK from LendingPad?

No. LendingPad does not support DBK. DBK versions of generated packages may be available through Document Files on the DocMagic Dashboard.