

Getting Started with DocMagic

After all origination information has been entered and documents are ready to be ordered - select documents. **(** View Serv Error Los 1 1 #7222019130 - John and Mary Sample Type: All Search: o Notifications a Outstanding Items Ordered a. are no memo notifications to dis Credit Report mplete Lo Type Date Added Abbreviated I Loan Plan for URLA - Borrow Loan Details & Subsidy Schedules a Interest, Paym Loan Prope a Dates Total Notifications: 0 Total Number Of Ite Lenders & L Flood Hazan Proposed Payments ð Qualifying the Borrowe ð First Mortgage (P&d): Subordinate Lien(s) P&d: Homeowner's Insurance: Supplemental Property In 1,088.02 525.00 250.00 66.67 364.58 78.13 416.67 60.00 DUE FROM BORROWER(S) A. Sales Contract Price B. Improvements, Renovati C. Land (if acquired separat vations, and Repair 71,781.23 2,000.00 5,316.23 rance: oject Dues (Condo, Co-Op, PUD): Total 60.331.24 Déll



Getting Started with DocMagic

Select Do	cMagic Interface.			
Loan Application	Quick Start for Loan Number: 7222019130 (John and N	lary Sample)		00
Seneral Information	Memo Notifications	đ	Outstanding Items Ordered	ð
orrowers axes & Insurance Ilosing Costs bata Transfer	There are no memo notifications to display.		Credit Report	
acking				
nderwriting Iocine Ri Guedine				
icondary Marketing	Previous Next	-	Previous Ne	at .
view	Iotai Noulicadolis.		Iotai Number of Items.	
emos	Proposed Payments	a	Qualifying the Borrower	đ
iscellaneous Fields ocuments Document Bundles Combine PDF Documents Asurity Technologies Interface	First Mortgage (P&I): Subordinate Lien(s) P&I: Homeowner's Insurance: Supplemental Property Insurance: Property Taxes: Mortgage Insurance: Association/Project Dues (Condo, Co-Op, PUD): Other:	1,088.02 525.00 250.00 66.67 364.58 78.13 416.67 60.00	DUE FROM BORROWER(S) A. Sales Contract Price B. Improvements, Renovations, and Repairs C. Land (if acquired separately) D. Balance of Mortgage Loans on the Property E. Credit Cards and Other Debts Paid Off F. Borrower Closing Costs G. Discount Points TOTAL DUE FROM BORROWER(s): LESS MORTGAGE LOANS AND CREDITS:	.00 5,000.00 471,781.23 2,000.00 5,316.23 .00 484,097.46 423,766.22
Cocwagie interface				
Document Service Provider Interface			Cash From/To the Borrower	
Document Service Provider Interface DocuPrep Interface IDS Interface	Total:	2,849.07		60,331.24
Document Service Provider Interface DocuPrep Interface DIDS Interface PPDocs Interface	Total:	2,849.07		60,331.24



Attaching Documents

If you have documents that need to be attached to the package – click here.



from your computer.



Selecting A Package – Initial Disclosures

Review Attach Documents Memos Product (s) Miscellaneous Fields Product ID Documents Closing Package - Purchase Closing Package - Refinance Closing Document Bundles Closing Package - Refinance Combine PDF Documents Initial Disclosures - Purchase Document Service Provider Interface Initial Disclosures - Refinance Document Service Provider Interface Initial Disclosures - Refinance Document Service Provider Interface Vebsite: https://stage-www.docmagic.com/webservices/cas/login Website: https://stage-www.docmagic.com/webservices/cas/login	Attach Documents Memos Miscellaneous Fields Documents Ocuments Ocument Bundles Conbine PDF Documents Oscument Service Provider Interface Document Service Provider Interface Ocument Service Provider Interface Obcument Service Provider Interface Product Service Provider Interface	Loan Application Seneral Information C forrowers axes & Insurance Closing Costs Data Transfer Fracking Inderwriting Closing & Funding Closing & Funding	Document Se rices Interface for Loc Request Response Vendor Orden/dentifier: 72220191 eSign? Image: Comments/Special Instructions:	an Number: 72220191 30	30 (John and Mary Sam Company Interface MISMO V	(Name: Dock (Name: Dock (Type: Docu User Name: krista ersion: 3.3	<mark>сМа</mark> fagic ment Systems, Inc harris@fics.com	agi . (DocMagic)	00 C
Memos Product(s) Miscellaneous Fields Product(s) Documents Closing Package - Purchase Closing Print Any Document Closing Package - Refinance Closing Document Bundles Closing Package - Refinance Closing Combine PDF Documents Initial Disclosures - Purchase Predisclosure Asurity Technologies Interface Loan Application - Purchase Loan Application DocuPrep Interface Document Service Provider Interface PDolos Interface PPDocs Interface PPDocs Interface Decement Service Provider Interface PDoc Source Purchase Decement Service Provider Interface PDoc Source Puterface Document Service Provider Interface PDocos Interface Decement Service Provider Interface PPDocs Interface Decement Service Provider Interface Provide Provider Interface	Memos Product(s) Miscellaneous Fields Product (D Includes LE? Includes CD? Includes TIL? Documents Closing Package - Purchase Closing Image: Closin	econdary Marketing Ieview	Attach Documents						
Miscellaneous Fields Miscellaneous Fields Miscellaneous Fields Product Product ID Includes LE? Includes CD? Includes GFE? Includes TII2 Closing Package - Purchase Closing Closing Package - Refinance Closing Closing Package - Refinance Closing Closing Package - Refinance Predisclosure Cloan Application - Purchase LoanApplication Website: https://stage-www.docmagic.com/websen/ces/login Radstar	Miscelaneous Fields Product Product ID Includes LE? Includes CD? Includes GFE? Includes TIL? © Documents □ Closing Package - Purchase Closing □ <th>/emos</th> <th>Product(s)</th> <th></th> <th>_</th> <th></th> <th></th> <th></th> <th></th>	/emos	Product(s)		_				
Documents Print Any Document Document Bundles Combine PDF Documents A surity Technologies Interface Document Service Provider Interface Document Service Provider Interface Document Service Provider Interface Popos Interface Popos Interface Popos Interface Popos Interface Docklt	Documents Print Any Document Document Bundles Combine PDF Documents Asurity Technologies Interface Document Service Provider Interface Document Service Provider Interface Document Service Provider Interface PopDocs Interface	Aiscellaneous Fields	Product	Product ID	Includes LE?	Includes CD?	Includes GFE?	Includes TIL3	2
Print Any Document Print Any Document Document Bundles Combine PDF Documents Asurity Technologies Interface DocuMagic Interface Document Service Provider Interface Documert Service Provider Interface DocuPrep Interface PPDocs Interface PPDocs Interface	Print Any Document Document Bundles Combine PDF Documents A surity Technologies Interface DocMagic Interface Document Service Provider Interface DocuPrep Interface DocuPrep Interface PPDocs Interface	ocuments	Closing Package - Purchase	Closing		1		2	
Initial Disclosures - Purchase Predisclosure Document Bundles Initial Disclosures - Purchase Predisclosure Asurity Technologies Interface Initial Disclosures - Refinance Predisclosure Imitial Disclosure Document Service Provider Interface Document Service Provider Interface Imitial Disclosures - Refinance Predisclosure Imitial Disclosure Document Service Provider Interface Document Service Provider Interface Imitial Disclosures - Refinance Imitial Disclosures - Refinance Imitial Disclosure Document Service Provider Interface Document Service Provider Interface Imitial Disclosure Imitial Disclosure Imitial Disclosure Document Service Provider Interface Website: https://stage-www.docmagic.com/webservices/cas/login Imitial Disclosure Imitial Disclosure PDDocument Service Provider Interface Imitial Disclosure Imitial Disclosure Imitial Disclosure Imitial Disclosure IDS Interface Imitial Disclosure Imitial Disclosure Imitial Disclosure Imitial Disclosure Porter Imitial Disclosure Imitial Disclosure Imitial Disclosure Imitial Disclosure Porter Imitial Disclosure Imitial Disclosure Imitial Disclosure	Primit Aufgrout Michael Document Bundles Combine PDF Documents Asurity Technologies Interface DockAgic Interface Document Service Provider Interface DocuPrep Interface IDS Interface PPDocs Interface Website: https://stage-www.docmagic.com/webservices/cas/login	Rint Any Document	Closing Package - Refinance	Closing		2			
Combine PDF Documents Asurity Technologies Interface DocMagic Interface Document Service Provider Interface DocuPrep Interface DocuPrep Interface DocuBreface PPDocs Interface DocuDreface	Combine PDF Documents Asurity Technologies Interface DocMagic Interface DocuPrep Interface DocuPrep Interface DocuPrep Interface PPDocs Interface PPDocs Interface DocuPrep Interface D	Document Bundles	Initial Disclosures - Purchase	Predisclosure	52		121	0	
Asurity Technologies Interface DocMagic Interface DocuPrep Interface DocuPrep Interface DocuPrep Interface PPDocs Interface Radstar	Asurity Technologies Interface DocuMagic Interface DocuPrep Interface	Combine PDF Documents	Initial Disclosures - Refinance	Predisclosure	121		121		
DocMagic Interface Docurren Int	DocuMagic Interface Document Service Provider Interface DocuPrep Interface PPDocs Interface PPDocs Interface Radstar	Asurity Technologies Interface	Loan Application - Purchase	LoanApplication	121		629		
Website: https://stage-www.docmagic.com/webservices/cas/login DocuPrep Interface PPDocs Interface Radstar	Docufrep Interface Website: https://stage-www.docmagic.com/webservices/cas/login Docufrep Interface PPDocs Interface Radstar DOcuLL	DocMagic Interface		counterprication	125.2		650	-	Ð
IDS Interface PPDocs Interface Radstar	IDS Interface PPDocs Interface Radstar	DocuPrep Interface	Website: <u>https://stage-www.doo</u>	magic.com/webservi	ces/cas/login				
PPDocs Interface Radstar	PPDocs Interface Image: Constraint of the second seco	IDS Interface							
Radstar DOCLL	Radstar DØLL	PPDocs Interface							
DØLL	Déll	ladstar							
DØLL	DØLL								
			0	DELL					

 \checkmark

Selecting A Package – Initial Disclosures

Check the document package of your choice. Note that Loan Producer can process both initial and closing disclosures, along with closing packages (covered at the end of the guide).

Loan Application	Document Services Interface or Lo	oan Number: 722201913	0 (John and	i Mary San	nple)			00
General Information	Request Response							
Borrowers	Vendor Order Identifier: 722 2019	130		٨				
Taxes & Insurance	eSign?			5/		ากเพล	IDF	C
Closing Costs	Mail Package? 📃						-gi	U
Data Transfer	Comments/Special Instructions:			Company	Name: D	ocMagic		
Tracking			199	Company	y Type: D	ocument Systems, Inc.	(DocMagic)	
Underwriting				Interface	User Name: k	istaharris@fics.com		
Closing & Funding				MISMO V	ersion: 3.	3		
Secondary Marketing								
Review	Attach Documents							
Memos	Product(s)		_	_				
Miscellaneous Fields	Product	Product ID	Inclu	ides LE?	Includes CD	? Includes GFE?	Includes TI	13
Documents	Closing Package - Purch se	Closing			2			*
Print Any Document	📃 Closing Package - Refina ce	Closing			1			
Document Bundles	📃 Initial Disclosures - Purchase	Predisclosure		2		12		
Combine PDF Documents	🔽 Initial Disclosures - Refinance	Predisclosure				2		
Asurity Technologies Interface DocMagic Interface	Loan Application - Purchase	LoanApplication		2		62		
 Document Service Provider Interface DocuPrep Interface IDS Interface PPDocs Interface 	Website: <u>https://stage-www.do</u>	ocmagic.com/webservio	es/cas/log	'n		Menu	amit C	
Radistar						Interio Sul		use
	•	DØLL						



Click Submit.

Loan Status Triggers

If you have Loan Status Triggers set up, you will see this Warning confirming if you want to change the status. Click Yes.

Loan Application	Document Services Interface for Loa	in Number: 722201913	0 (John an	id Mary Sample)				00
	Request Response							
General Information	Vendor Order Identifier 72220191	30	-	A	_	10.000	1	
Borrowers								0
Taxes & Insurance	eSign?				U	LIVIC	IUI	L
Closing Costs	Mail Package?			• • -			5	
Data Transfer	Comments/Special Instructions:			Company Name:	Doc	lagic		
Tracking			100	Company Type:	Doc	ment Systems, Inc. (I	DocMagic)	
Underwriting				Interface User Name:	krist	harris@fics.com		
Closing & Funding				MISMO Version:	3.3			
Secondary Marketing					_	0	_	
Review Wassies The Sector	Cadawill be abarred from (Davied) to	(Forthe Directory and)		a de la d	. 15	Diadament		
Memos	code will be changed from [Denied] to	ceany Disclosures). L	o you wa	nt to change the status t	o (Ear	Disclosuresj:		
Miscellaneous Fields						Yes No	Includes TI	13
Documents	Closing Package - Purchase	Closing					V	*
Print Any Document	Closing Package - Refinance	Closing					2	
Document Bundles	Initial Disclosures - Purchase	Predisclosure				12		188
Combine PDF Documents	☑ Initial Disclosures - Refinance	Predisclosure		2 0		12		
Asurity Technologies Interface	Loan Application - Purchase	LoanApplication		2		[2]		
DocMagic Interface Document Service Prevides Interface						Salisa		•
Document Service Provider Interface DocuPren Interface	Website: <u>https://stage-www.doc</u>	magic.com/webservic	es/cas/log	gin				
IDS Interface								
PPDocs Interface								
Radstar								
		8411						



Review Documents



Click on any hyperlink to open an individual document. "View Combined PDFs" at the top of the stack allows you to view the whole package.



Re-Submitting The Package

After reviewing the information, re-submit the package.





Re-Submitting The Package

A second window will appear.



Click Yes again.



eSign

An eSign checkmark will appear to indicate that the package was submitted via eSign.

Loan Application	Document	Services Interface for Loan Nur	mber: 7222019130 (John and I	Mary Sample)		00
	Request	Response				•
Berrowerr	Product:		# of Documents:	# of Messages:	Date Ordered:	eSign?
Taxas & Incurance	Initial Discl	osures - Refinance	26	53	1/20/2021 10:17:00 AM	0
Closing Costs	Document	(s) (26)			Menu	
Closing Cosis	View Com	bined PDEs			X Delete Package	
Data Iranster	Loan Deta	il Report.DSI			View Messages (53)	
Tracking	Loan Deta	il Report.pdf		3	Re-Submit Package	
Underwriting	Evidence o	of Joint Application.pdf		*	Disclose To Borrower	
Closing & Funding	Uniform R	esidential Loan Appli0.pdf			Open in DocMaster	
Secondary Marketing	Borrowers	Certification and Au.pdf			Retrieve eSign PDF's	
Review	T - Reque	st for Transcript of .pdf			Inclusive esign messages	
Memos	Additional	Details for Service.pdf				
Miscellaneous Fields	Product:		# of Documents:	# of Messages:	Date Ordered:	eSign?
Documents	Underwritir	ng	10	53	12/9/2020 1:41:00 PM	
Print Any Document						
Document Bundles						
Combine PDF Documents						
Asurity Technologies Interface						
DocMagic Interface						
Document Service Provider Interface						
IDS Interface						
PPDocs Interface						
Radstar						
	8					
		2	0/11			

Options to Retrieve eSign PDF's and Retrieve eSign Messages appear.



eSign

Click Retrieve eSign Messages for a log of time stamped actions.





eSign

Once the package is signed, you'll be able to retrieve signed PDFs of the documents here.



Before then, you will receive this message if you click on Retrieve eSign PDF's.



Disclose to Borrower

Next, click Disclose to Borrower.

Loan Application	Document	Services Interface for Loan N	umber: 7222019130 (John and N	Mary San	ple)	_	00
General Information	Request	Response					
Borrowers	Product:		# of Documents:	# of	Aessages:	Date Ordered:	eSign?
Taxes & Insurance	Initial Discl	osures - Refinance	26	53		1/20/2021 10:17:00 AM	0
Closing Costs	Document	(s) (26)		_	-	Menu	
Data Transfer	View Com	bined PDFs				× Delete Package	
Tracking	Loan Deta	il Report.DSI			÷.	View Messages (53)	
Underwriting	Loan Deta Evidence o	il Report.pdf of Joint Application.pdf				Re-Submit Package	
Closing & Funding	Uniform R	esidential Loan Appli.pdf			- U	Open in DocMaster	
Secondary Marketing	Uniform R Borrowers	esidential Loan Appli0.pdf Certification and Au.pdf				Retrieve eSign PDF's	
Review	T - Reque	st for Transcript of .pdf				Retrieve eSign Messages	
Memos	T - Reque	st for Transcript of 1.pdf Details for Service.pdf				43	
Miscellaneous Fields	Product:		# of Documents:	# of	Messages:	Date Ordered:	eSign?
Documents	Underwritir	g	10	53		12/9/2020 1:41:00 PM	
Print Any Document Combine PDF Documents Asurity Technologies Interface DocMagic Interface Document Service Provider Interface DocuPrep Interface IDS Interface DocuPrep Interface Docu							
Radstar							
	4						
			DELL				

This creates a record to indicate that the Loan Estimate was disclosed and sets tolerances for the baseline because there is a Loan Estimate in the package.



Combine PDF Documents

The Combine PDF Documents window appears which allows you to add additional documents to the package or change the order.





Bypass

Hit Ok to bypass this menu (allows importation of individual documents – not relevant).

Loan Application						-
Seneral Information	Request	Rename Radstar	0			
Borrowers	Product: Initial Disclose	LoanDetail_Report.DSI	•	of Messages:	Date Ordered: 1/20/2021 10:17:00 AM	eSign?
Taxes & Insurance		LoanDetail_Report.pdf	•			0
Closing Costs	Document(s)	Evidenceof_Joint_Application.p	-		Menu	
Data Transfer	View Combi	UniformResidential_Loan_Appli			X Delete Package	
Texture	Loan Detail	BorrowersCertification_and_Au	•		View Messages (53)	
Iracking	Loan Detail	TRequest_for_Transcript_ofr	•	1	Re-Submit Package	
Underwriting	Evidence of	TRequest_for_Transcript_of_1	•	1	Disclose To Borrower	
Closing & Funding	Uniform Res	AdditionalDetails_for_Service.p	•		Open in DocMaster	
Secondani Marketing	Uniform Res	Authorizationfor_the_Social_S.r	•		Retrieve eSign PDF's	
secondary marketing	Borrowers Co	Authorizationfor_the_Social_S2.	•		Retrieve eSign Messages	
Review	T - Request	BorrowerConsent_to_the_Use_c	· ·		R	
Memos	Additional D	BorrowerConsent_to_the_Use_c			v	
Miscellaneous Fields	Product:	FloodHazard Notice.pdf		t of Messages:	Date Ordered:	eSian?
Documents	Underwriting	HousingCounselors_Near_You.	•	33	12/9/2020 1:41:00 PM	congini
occuments		ImportantInformation_About_F				
Print Any Document		LoanEstimate.pdf	•			
Document Bundles		Noticeof_Special_Flood_Hazard	•			
Combine PDF Documents		ResidentialMortgage_Credit_Sc	•			
Asurity Technologies Interface		SettlementServices_Provider_L.	•			
DocMagic Interface		StandardFlood_Hazard_Determ	•			
Document Service Provider Interface		TexasConditional_Pre-Qualific.				
DocuPrep Interface		TexasLock-In"Agreement.pdf				
DIS Interface		TexasMortgage_Banker_Conditi	• •			
PPDocs Interface		UniformUnderwriting_And_Trar	_			
n in the second sec			OK Cancel			
Kadstar						

Success

This window appears telling you that everything was successful.





DocMaster

You can open the finished package in DocMaster and send it straight to a title company.

Loan Application	Document	Services Interfa	ce for Loan Numbe	er: 7222019130 (John and	Mary Sar	ple)		00
General Information	Request	Response						
Borrowers	Product:	osures - Refinan		# of Documents:	# of	Messages:	Date Ordered: 1/20/2021 10-17-00 AM	eSign?
Taxes & Insurance		osures - Nerman	ice .	20	~~~		1/20/2021 10:17:00 AM	0
Closing Costs	Document	t(s) (26)			_	-	Menu	1
Data Transfer	View Com	bined PDFs					X Delete Package	
Tracking	Loan Deta	il Report.DSI				ć	View Messages (53)	
Underwriting	Loan Deta Evidence d	of Joint Applica	ation.pdf			14	Re-Submit Package	
Closing & Funding	Uniform R	tesidential Loan	Appli.pdf			L->"	Open in DocMaster	
Secondary Marketing	Borrowers	Certification a	nd Au.pdf				Retrieve eSign PDF's	
Review	T - Reque	st for Transcrip	ot of .pdf				Retrieve eSign Messages	
Memos	T - Reque	st for Transcrip Details for Ser	nt of 1.pdf					
Miscellaneous Fields	Product:	econy for ser	Hec.put	# of Documents:	# of	Messages:	Date Ordered:	eSign?
Documents	Underwritir	ng		10	53		12/9/2020 1:41:00 PM	
Print Any Document Document Bundles Combine PDF Documents Auvity Technologies Interface								
DocMagic Interface								
Document Service Provider Interface DocuPrep Interface								
 IDS Interface PPDocs Interface 								
Radstar								
			D4					

The DocMaster application, if installed on your computer, will automatically open once the link is clicked.



Total eClose

If you're doing Total eClose, your options will be here. eSign should always be checked. eNote and eNotary should be checked based on your closing type.

Loan Application	Document Services I	interface for Lo	an Numb: : 12345678	91 (Michael	Sample)				14
General Information	Request Respo	onse							
Sorrowers	Vendor Order Identit	fier: 1234567	891		٨				
Taxes & Insurance	eSign?	1			-	< Dr		M:	adin
Closing Costs	eNote?	2						1-10	Jyn
Data Transfer	eNotary?	Type:			Compan	y Name: [)ocMagic		
Tracking	Mail Package?	DocMagic			Compan	y Type: [ocument	Systems, Inc	(DocMagic)
Underwriting	Comments/Special	Notarize		k	Interface	User Name: o	lavid@doc	magic.com	1
Closing & Funding	10.24	Notary Cam World Wide	Notes	ABG	MISMON	/ersion:	.3		
Secondary Marketing		word white	worary						
Review									
Memos	1								
Miscellaneous Fields	Attach Documents								
Documents	Product(s)								
Print Any Document	Product		Product ID	Incl	udes LE?	Includes CI)? Inc	ludes GFE?	Includes TIL?
Document Bundles	Closing		Closing			1			
Combine PDF Documents	Electronic Note		Enote						
O DocMagic Interface	📃 Initial Disclosure	e	Predisclosure		(2)				\square
Radstar	📰 Loan Applicatio	n	LoanApplication		10	0			
	Underwriting Pa	ockage	Underwriting		1				
	Website: <u>https://</u>	stage-www.do	cmagic.com/webser : D≪LL	ces/authen	<u>tication/ap</u>	i/v1/authentic	te		

If you check eNotary, please select a provider as well.



Total eClose

Select your package next. You can run a Closing package, or just the Note. Then, click Submit in the bottom right.

st Response Ord r Identifies 1234:	67891 DecMagic	\$	Company Company Interface I MISMO Ve	Name: Dock Name: Dock Type: Docu User Name: davic ersion: 3.3	CMa Magic urment Systems, Inc 1@docmagic.com	agi
Ord r Identifier 1234 7 7 7 7 7 7 7 7 7 7 7 7 7	67891 DecMagic	*	Company Company Interface I MISMO Ve	Name: Doch Name: Doch User Name: davic ersion: 3.3	CMa Magic ument Systems, Inc d@docmagic.com	agi
Image: construction Provide a construction Construction Does ments (a)	e: DocMagic	-	Company Company Interface I MISMO Ve	Name: DocN Type: Docu User Name: davic ersion: 3.3	CIVIC Magic ument Systems, Inc I@docmagic.com	agi . (DocMagic)
Image: construction cka e? ints Special Instructions Occ ments (a)	ne: DocMagic		Company Company Interface I MISMO Ve	Name: Doch Type: Docu User Name: davic ersion: 3.3	Magic ument Systems, Inc 4@docmagic.com	. (DocMagic)
? V Tyr cka e? Special Instruction:	e: DocMagic		Company Company Interface I MISMO Ve	Name: Doch Type: Docu User Name: davic ersion: 3.3	Magic ument Systems, Inc 1@docmagic.com	. (DocMagic)
cka e? Instruction:	2	\$	Company Interface I MISMO Ve	Type: Docu User Name: davio ersion: 3.3	ument Systems, Inc 1@docmagic.com	. (DocMagic)
ents Special Instruction:	8	\$	Interface l MISMO Ve	User Name: davic ersion: 3.3	1@docmagic.com	
Doc ments (s)		\$	MISMO V	ersion: 3.3		
Doc ments (s)						
Dace ments (s)						
Doc ments (s)						
Ooc ments (s)						
(s)						
	Product ID	Inclu	udes LE?	Includes CD?	Includes GFE?	Includes TI
sing	Closing			12		
tronic Note	Enote		E1			
al Disclosure	Predisclosure		52			
n Application	LoanApplication		121	13		
lerwriting Package	Underwriting					
s https://stage-www	docmagic.com/webservi	ces/authent	tication/api/	/v1/authenticate		Subm
	ial Disclosure in Application derwriting Package e: <u>https://stage-www</u>	ial Disclosure Predisclosure In Application LoanApplication derwriting Package Underwriting e: https://stage-www.docmagic.com/webservi	ial Disclosure Predisclosure In Application LoanApplication derwriting Package Underwriting e: https://stage-www.docmagic.com/websen/ices/authent	ial Disclosure Predisclosure 📝 Im Application LoanApplication derwriting Package Underwriting E: https://stage-www.docmagic.com/webservices/authentication/api	ial Disclosure Predisclosure I I I I I I I I I I I I I I I I I I I	ial Disclosure Predisclosure 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2



Total eClose

Make sure you have information entered for the Settlement and Closing Agents, if necessary.

Loan Application	Settlement Info Truste	ees Attorneys Collateral Owners	Conditions Additional Info Comments	
General Information	Settlement Agent	-	Escrow	
Taxes & Insurance Closing Costs Data Transfer Tracking Underwriting Closing & Funding Closing Information Closing Information Closing Information Closing Information Closing Information Closing Review Memos	Name Address: City: State: License Number: TIN: Contact: Phone: Fax: E-mail: Contact License Number:	Sett ement: Test 123 Settle St Ton nce CA Zip: 90501- 234 5 00- 000 00000 Settle Ment (311, 1999 - 8888 Ext: (1) - sha non@docmagic.com 789 0	Account Number: Title Policy Information Policy Number: Endorsements: Exception Items: Tax Message:	
Miscellaneous Fields	Closing Agent		Closing Location	
Documents Radstar	Name Address: City: State: License Number: License Authority Type: License State:	Closing Sample	Same as Settlement Agent? County: Los Angeles - LA - CA Address: 1234 Settle St City: Torrance State: CA ▼ Zip: 90501- Closing Time: 05:00 ○ AM ● PM Scheduled Closinn Date: 10/20/2023 ①	v • 11-

This can be accessed by going to Closing & Funding on the left and selecting Closing Information, and then the Settlement Info tab.



Total eClose

If the request was successful, you should see the package and all the participants in the <u>eSign Console</u>.

F	Loan #: Primary Name: Type: Package Id: Worksbeet #	123456789 Michael B 3 EClosing 1285706	1 Sample	Lender:	David Garret DOCMAGIC 1 (100DBG) david@docma (888)555-121	tt TEST ACC aglc.com	COUNT		Status: Documents: Signers: Expires: Signatures:	New (Ad 33 (92 to 4 N/A (Re	ctive) otal pages) quires: Primary)
	Closing Date:	10/20/23	(10101011:0)		(000,000-121	-			orginatures.		
)etails Do	cuments	Documents Receiv	ved EMails	s Versior	ns					© ₽ <mark>₽</mark> 🖨 🗢 🔒
Pa	rticipants	2+									Preview Mode - Off
#	Name/Email			Role	Created	Started	Consented	Viewed	Completed	Declined	Links
1	Michael B Sam shannon@docma	nple agic.com		Borrower	10/17/24 2:02 PM						Send Email Sign Documents
2	Closing Agent shannon@docma	agic.com		Settlement Agen	t 10/17/24 2:02 PM						Send Email Agent Portal
4	Omar Originato shannon@docma	or agic.com		Originator	10/17/24 2:02 PM						Send Email Sign Documents
5	Notary_name_ NOTARY_EMAIL	placeholder - PLACEHOLD	1 ER-1	Notary	10/17/24 2:02 PM						Send Email
Ac	tion Log										
Dat	te		User	IP Ac	tdress	Descriptio	'n				
10/	17/24 2:02 PM		System User			eSign ev	ent created a	and expire	es on 10/17/2	024	
10/	17/24 2:02 PM		Michael Sample			Invitation	sent to shan	nnon@do	cmagic.com		
10/	17/24 2:02 PM		Closing Agent			Invitation	sent to shan	nnon@do	cmagic.com		
10	17/24 2:02 PM		Omar Originator			Invitation	sent to shar	nnon@do	cmagic.com		
					100						

