DocMagic
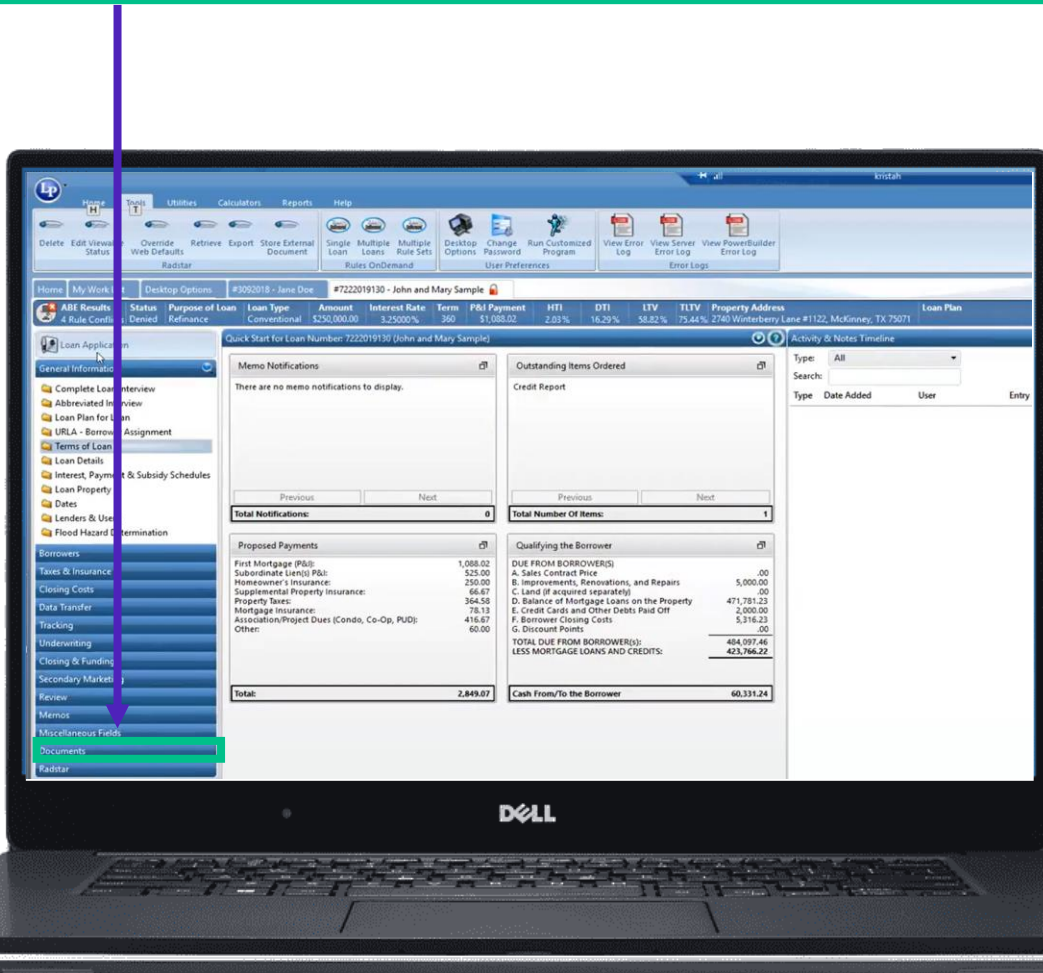
Loan Producer

Getting Started with DocMagic

After all origination information has been entered and documents are ready to be ordered – select documents.

Loan Producer

Select DocMagic Interface.

Attaching Documents

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

Click here to attach a file from your computer.

Selecting A Package – Initial Disclosures

For now – make sure that eSign is NOT checked.

These columns allow the customer to easily identify which documents are included in what package.

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.

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 Status Triggers

Warning - The Status Code will be changed from [Denied] to [Early Disclosures]. Do you want to change the Status to [Early Disclosures]?

Yes | No

Loan Producer

The documents selected in your package will appear in the response tab.

Document Services Interface for Loan Number: 7222019130 (John and Mary Sample)

Loan Application
General Information
Borrowers
Taxes & Insurance
Closing Costs
Data Transfer
Tracking
Underwriting
Closing & Funding
Secondary Marketing
Review
Memos
Miscellaneous Fields
Documents

| Print Any Document |
| Document Bundles |
| Combine PDF Documents |
| Asurity Technologies Interface |
| DocMagic Interface |
| Document Service Provider Interface |
| DocuPrep Interface |
| IDS Interface |
| PPDocs Interface |

Radstar

Request | Response

Product:	# of Documents:	# of Messages:	Date Ordered:	eSign?
Initial Disclosures - Refinance	26	50	1/20/2021 10:15:00 AM	

Document(s) (26)

View Combined PDFs
Loan Detail Report.DSI
Loan Detail Report.pdf
Evidence of Joint Application.pdf
Uniform Residential Loan Appli.pdf
Uniform Residential Loan Appli0.pdf
Borrowers Certification and Au.pdf
T - Request for Transcript of .pdf
T - Request for Transcript of 1.pdf
Additional Details for Service.pdf

Menu

X Delete Package
View Messages (50)
Re-Submit Package
Disclose To Borrower
Open in DocMaster

Product:	# of Documents:	# of Messages:	Date Ordered:	eSign?
Underwriting	10	53	12/9/2020 1:41:00 PM	

DELL

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.

Click Yes.

Re-Submitting The Package

A second window will appear.

Click Yes again.

Loan Producer

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

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

eSign

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

Loan Producer

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

Document Services Interface for Loan Number: 7222019130 (John and Mary Sample)

Loan Application	
General Information	
Borrowers	
Taxes & Insurance	
Closing Costs	
Data Transfer	
Tracking	
Underwriting	
Closing & Funding	
Secondary Marketing	
Review	
Memos	
Miscellaneous Fields	
Documents	

Request | Response

Product:	# of Documents:	# of Messages:	Date Ordered:	eSign?
Initial Disclosures - Refinance	26	53	1/20/2021 10:17:00 AM	✓

Document(s) (26)

View Combined PDFs
Loan Detail Report.DSI
Loan Detail Report.pdf
Evidence of Joint Application.pdf
Uniform Residential Loan Appli.pdf
Uniform Residential Loan Appli0.pdf
Borrowers Certification and Au.pdf
T - Request for Transcript of .pdf
T - Request for Transcript of 1.pdf
Additional Details for Service.pdf

Menu

✗ Delete Package
View Messages (53)
Re-Submit Package
Disclose To Borrower
Open in DocMaster
Retrieve eSign PDF's
Retrieve eSign Messages

Product:	Response for Loan Number: 7222019130 (John and Mary Sam)	eSign?
Underwriting	No Signed Documents Available.	

OK

- Print Any Document
- Document Bundles
- Combine PDF Documents
- Asurity Technologies Interface
- DocMagic Interface
- Document Service Provider Interface
- DocuPrep Interface
- IDS Interface
- PPDocs Interface

Radstar

DELL

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

Loan Producer

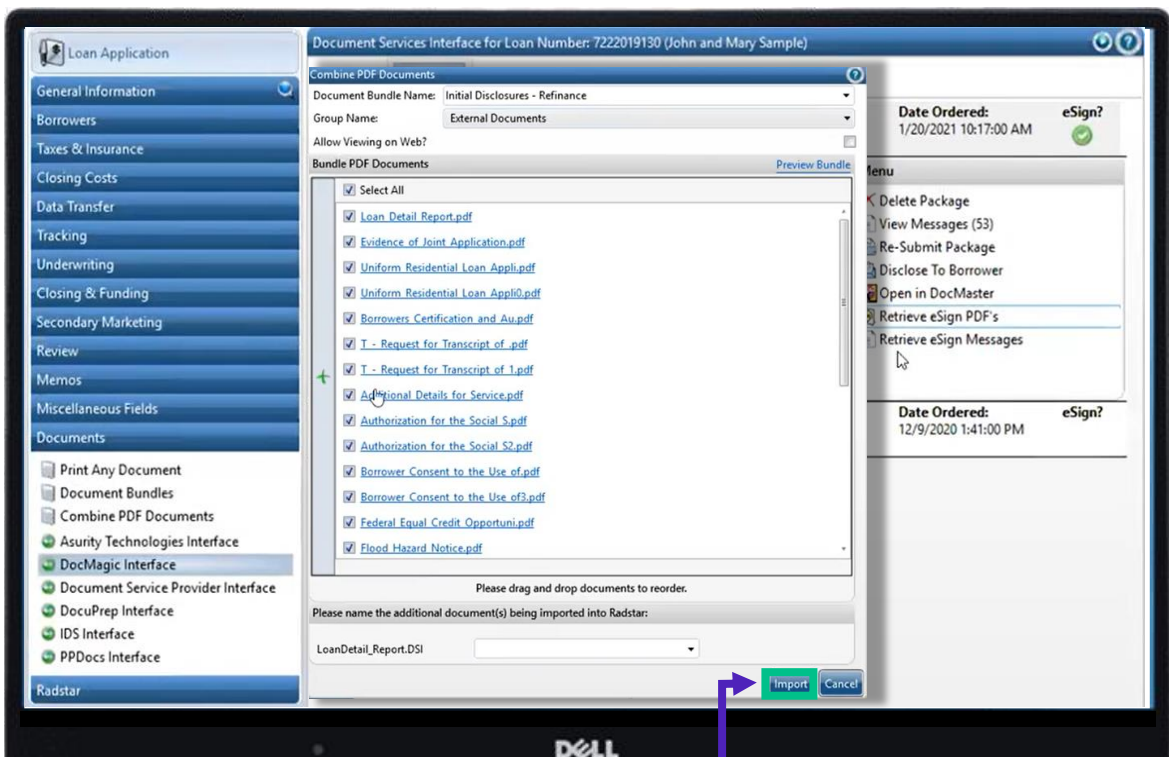Next, click Disclose to Borrower.

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.
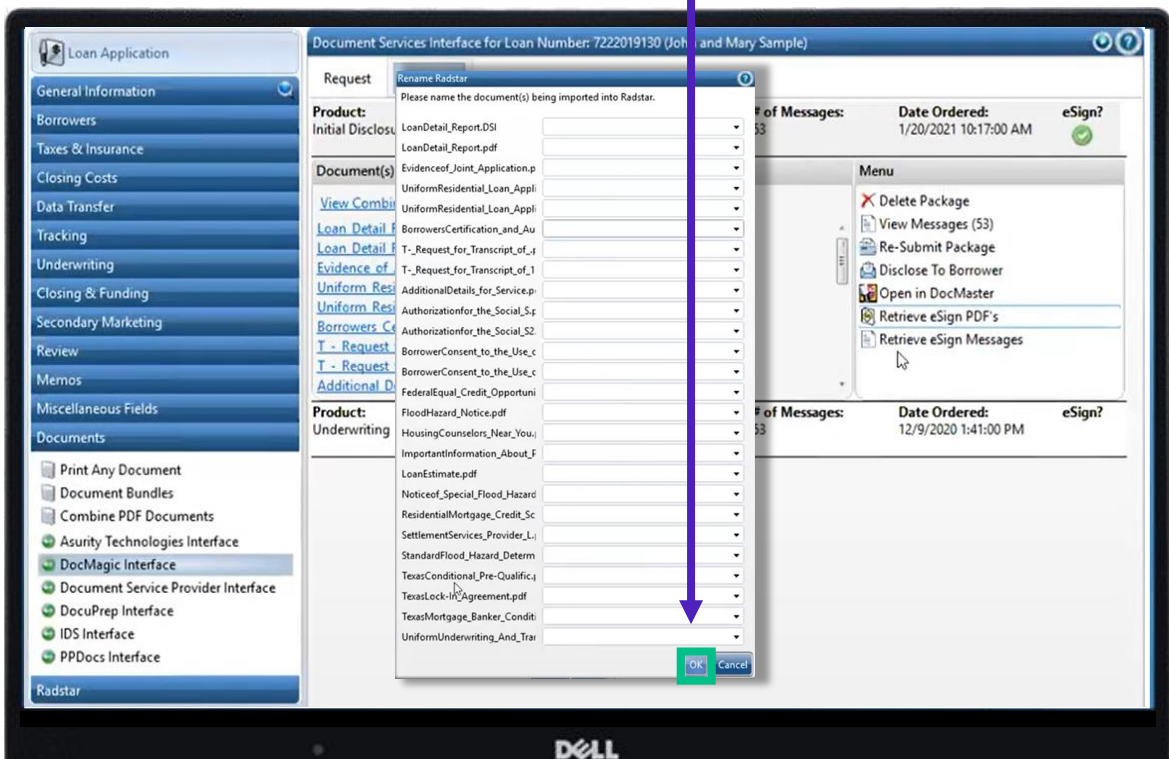

Click here to Import.

Bypass

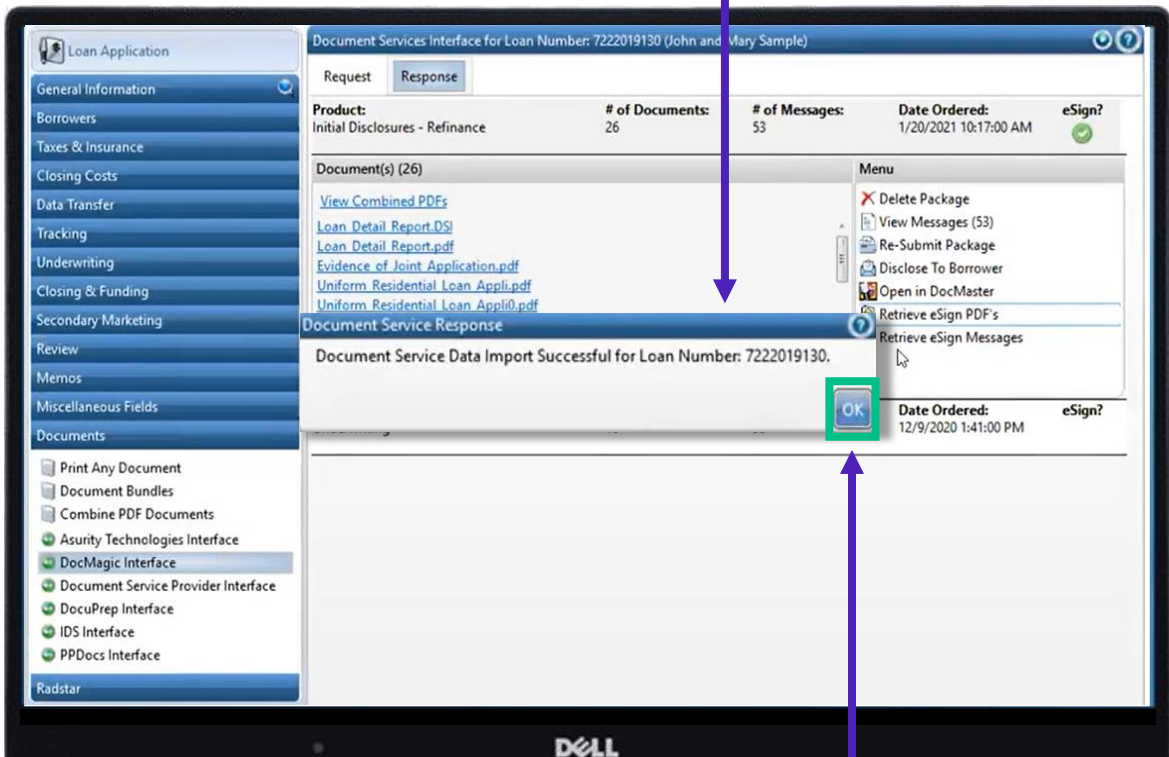Hit Ok to bypass this menu (allows importation of individual documents – not relevant).

Success

This window appears telling you that everything was successful.
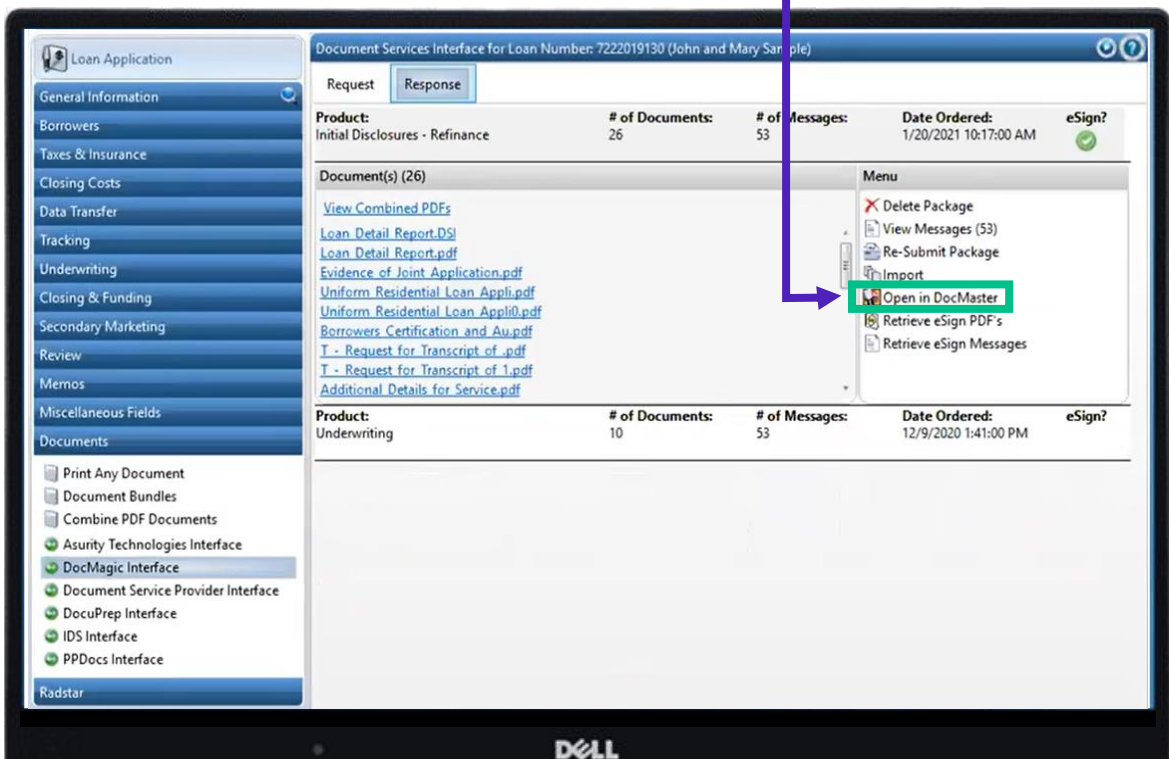
Click OK.

Loan Producer

DocMaster

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

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