

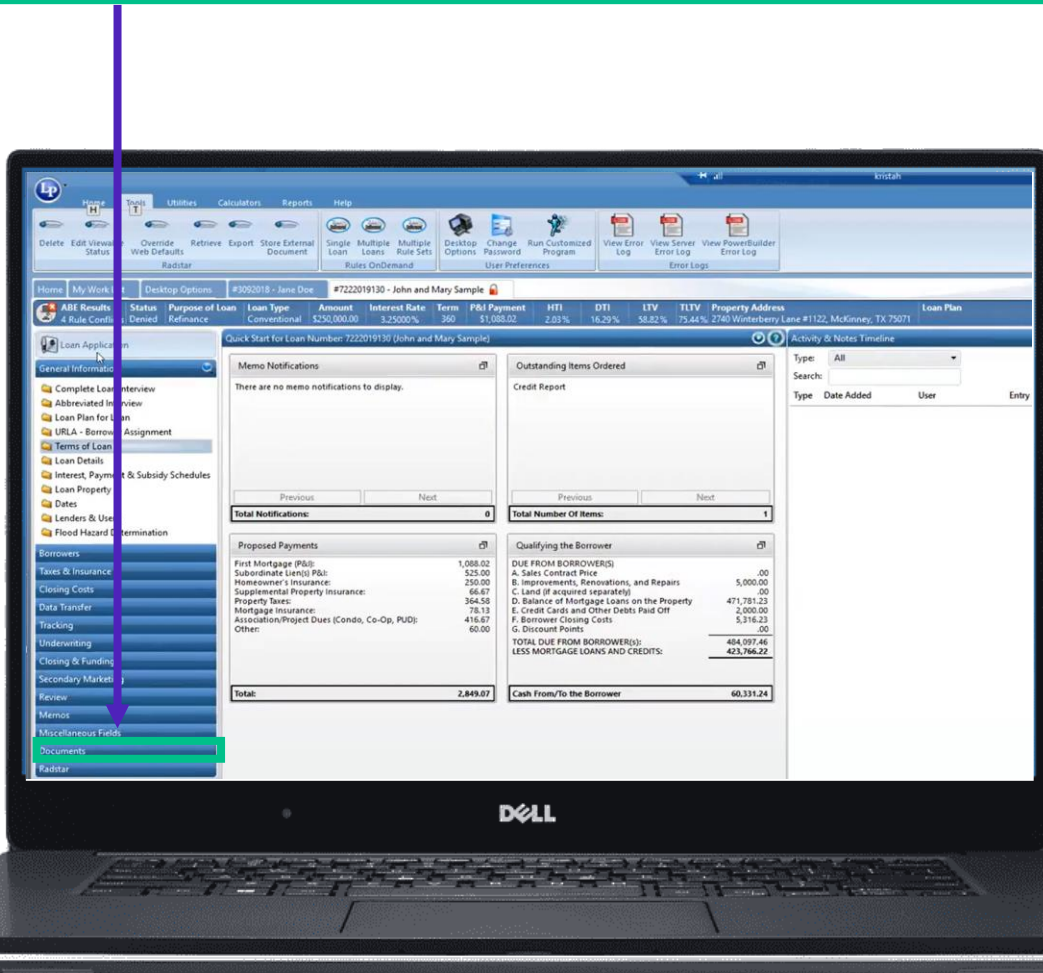


Loan Producer

# Loan Producer

## Getting Started with DocMagic

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



# Loan Producer

## Getting Started with DocMagic

Select DocMagic Interface.

The screenshot displays the 'Loan Application' software interface. The left-hand navigation pane is expanded to the 'Documents' section, where 'DocMagic Interface' is highlighted with a green box and a blue arrow pointing to it. The main window title is 'Quick Start for Loan Number: 7222019130 (John and Mary Sample)'. The interface is divided into several panels:

- Memo Notifications:** A panel indicating 'There are no memo notifications to display.' with 'Previous' and 'Next' buttons and a 'Total Notifications: 0' summary.
- Outstanding Items Ordered:** A panel for 'Credit Report' with 'Previous' and 'Next' buttons and a 'Total Number Of Items: 1' summary.
- Proposed Payments:** A table listing various payment items and their amounts.
- Qualifying the Borrower:** A table detailing the borrower's financial obligations and a final 'Cash From/To the Borrower' amount.

Item	Amount
First Mortgage (P&I):	1,088.02
Subordinate Lien(s) P&I:	525.00
Homeowner's Insurance:	250.00
Supplemental Property Insurance:	66.67
Property Taxes:	364.58
Mortgage Insurance:	78.13
Association/Project Dues (Condo, Co-Op, PUD):	416.67
Other:	60.00
<b>Total:</b>	<b>2,849.07</b>

Item	Amount
DUE FROM BORROWER(S)	
A. Sales Contract Price	.00
B. Improvements, Renovations, and Repairs	5,000.00
C. Land (if acquired separately)	.00
D. Balance of Mortgage Loans on the Property	471,781.23
E. Credit Cards and Other Debts Paid Off	2,000.00
F. Borrower Closing Costs	5,316.23
G. Discount Points	.00
<b>TOTAL DUE FROM BORROWER(S):</b>	<b>484,097.46</b>
<b>LESS MORTGAGE LOANS AND CREDITS:</b>	<b>423,766.22</b>
<b>Cash From/To the Borrower</b>	<b>60,331.24</b>



# Loan Producer

## Attaching Documents

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

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

Request Response

Vendor Order Identifier: 7222019130

eSign?

Mail Package?

Comments/Special Instructions:

Company Name: DocMagic

Company Type: Document Systems, Inc. (DocMagic)

Interface User Name: kristaharris@fics.com

Document Services - Attach Documents 3.3

Select File from Filestore. Retrieve Radstar Document

Cancel

Product(s)	Product	CD?	Includes GFE?	Includes TIL?
<input type="checkbox"/>	Adverse Action Adverse	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Closing Disclosure - Purchase ClosingDisclosure	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Closing Disclosure - Refinance ClosingDisclosure	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Closing Package - Purchase Closing	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Closing Package - Refinance Closing	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Website: <https://stage-www.docmagic.com/web/services/cas/login>

Click here to attach a file from your computer.



# Loan Producer

## Selecting A Package – Initial Disclosures

For now – make sure that eSign is NOT checked.

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

Request Response

Vendor Order Identifier: 7222019130

**eSign?**

Mail Package?

Comments/Special Instructions:

Company Name: DocMagic  
Company Type: Document Systems, Inc. (DocMagic)  
Interface User Name: kristaharris@fics.com  
MISMO Version: 3.3

**Attach Documents**

Product	Product ID	Includes LE?	Includes CD?	Includes GFE?	Includes TIL?
<input type="checkbox"/> Closing Package - Purchase	Closing	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Closing Package - Refinance	Closing	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Initial Disclosures - Purchase	Predisclosure	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Initial Disclosures - Refinance	Predisclosure	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Loan Application - Purchase	LoanApplication	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Website: <https://stage-www.docmagic.com/webservices/cas/login>

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



# Loan Producer

## 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.

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

Request Response

Vendor Order Identifier: 7222019130

eSign?

Mail Package?

Comments/Special Instructions:

Company Name: DocMagic  
Company Type: Document Systems, Inc. (DocMagic)  
Interface User Name: kristaharris@fics.com  
MISMO Version: 3.3

Attach Documents

Product	Product ID	Includes LE?	Includes CD?	Includes GFE?	Includes TIL?
<input type="checkbox"/> Closing Package - Purchase	Closing	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Closing Package - Refinance	Closing	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Initial Disclosures - Purchase	Predisclosure	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Initial Disclosures - Refinance	Predisclosure	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Loan Application - Purchase	LoanApplication	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Website: <https://stage-www.docmagic.com/webservices/cas/login>

Menu **Submit** Close

Click Submit.



# Loan Producer

## 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.

The screenshot displays the DocMagic Document Services Interface for Loan Number: 7222019130 (John and Mary Sample). The interface includes a left-hand navigation menu with categories like General Information, Borrowers, Taxes & Insurance, Closing Costs, Data Transfer, Tracking, Underwriting, Closing & Funding, Secondary Marketing, Review, Memos, Miscellaneous Fields, and Documents. The main content area shows a Request/Response section with fields for Vendor Order Identifier (7222019130), eSign?, Mail Package?, and Comments/Special Instructions. A warning dialog box is overlaid on the interface, asking: "Warning - The Status Code will be changed from [Denied] to [Early Disclosures]. Do you want to change the Status to [Early Disclosures]?" The dialog has "Yes" and "No" buttons, with the "Yes" button highlighted by a green box. A blue arrow points from the text box above to the "Yes" button. Below the dialog, there is a table of Loan Status Triggers and a website URL: <https://stage-www.docmagic.com/webservices/cas/login>.

Document	Category	Request	Response	Includes TIL?
<input type="checkbox"/> Closing Package - Purchase	Closing	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Closing Package - Refinance	Closing	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Initial Disclosures - Purchase	Predisclosure	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Initial Disclosures - Refinance	Predisclosure	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Loan Application - Purchase	LoanApplication	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>



# Loan Producer

## Review Documents

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

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

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.DS](#)
- [Loan Detail Report.pdf](#)
- [Evidence of Joint Application.pdf](#)
- [Uniform Residential Loan Appli0.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 (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	

Print Any Document

Document Bundles

Combine PDF Documents

Asurity Technologies Interface

DocMagic Interface

Document Service Provider Interface

DocuPrep Interface

IDS Interface

PPDocs Interface

Radstar

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.





# Loan Producer

## Re-Submitting The Package

After reviewing the information, re-submit the package.

The screenshot shows a web application interface for loan management. On the left is a navigation menu with categories like 'General Information', 'Borrowers', 'Taxes & Insurance', 'Closing Costs', 'Data Transfer', 'Tracking', 'Underwriting', 'Closing & Funding', 'Secondary Marketing', 'Review', 'Memos', 'Miscellaneous Fields', and 'Documents'. The main area is titled 'Document Services Interface for Loan Number: 7222019130 (John and Mary Sample)'. It has tabs for 'Request' and 'Response'. Below the tabs, there are summary statistics: 'Product: Initial Disclosures - Refinance', '# of Documents: 26', '# of Messages: 50', and 'Date Ordered: 1/20/2021 10:15:00 AM'. A list of documents is shown with links like 'View Combined PDFs', 'Loan Detail Report.DS', 'Loan Detail Report.pdf', 'Evidence of Joint Application.pdf', and 'Uniform Residential Loan Appli.pdf'. A 'Menu' on the right includes options like 'Delete Package', 'View Messages (50)', 'Re-Submit Package', 'Disclose To Borrower', and 'Open in DocMaster'. A confirmation dialog box is open in the center, asking 'Are you sure you want to re-submit and replace this Package?' with 'Yes' and 'No' buttons. A purple arrow points from a text box below to the 'Yes' button.

Click Yes.



# Loan Producer

## Re-Submitting The Package

A second window will appear.

The screenshot displays the Document Services Interface for Loan Number: 7222019130 (John and Mary Sample). The interface is divided into a left sidebar, a main content area, and a bottom section. The sidebar contains a navigation menu with categories like General Information, Borrowers, Taxes & Insurance, Closing Costs, Data Transfer, Tracking, Underwriting, Closing & Funding, Secondary Marketing, Review, Memos, Miscellaneous Fields, and Documents. The main content area shows a table of documents and messages, and a modal dialog box asking 'Would you like to re-submit with eSign?' with 'Yes' and 'No' buttons. A purple arrow points to the 'Yes' button.

Product:	# of Documents:	# of Messages:	Date Ordered:	eSign?
Initial Disclosures - Refinance	26	50	1/20/2021 10:15:00 AM	
Underwriting	10	53	12/9/2020 1:41:00 PM	

Click Yes again.



# Loan Producer

eSign

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

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

Request Response

Product:	# of Documents:	# of Messages:	Date Ordered:	eSign?
Initial Disclosures - Refinance	26	53	1/20/2021 10:17:00 AM	<input checked="" type="checkbox"/>
<b>Document(s) (26)</b>				
<a href="#">View Combined PDFs</a>				
<a href="#">Loan Detail Report.DS</a>				
<a href="#">Loan Detail Report.pdf</a>				
<a href="#">Evidence of Joint Application.pdf</a>				
<a href="#">Uniform Residential Loan Appli.pdf</a>				
<a href="#">Uniform Residential Loan Appli0.pdf</a>				
<a href="#">Borrowers Certification and Au.pdf</a>				
<a href="#">T - Request for Transcript of .pdf</a>				
<a href="#">T - Request for Transcript of 1.pdf</a>				
<a href="#">Additional Details for Service.pdf</a>				
<b>Menu</b>				
<input type="checkbox"/> Delete Package				
<input type="checkbox"/> View Messages (53)				
<input type="checkbox"/> Re-Submit Package				
<input type="checkbox"/> Disclose To Borrower				
<input type="checkbox"/> Open in DocMaster				
<input checked="" type="checkbox"/> Retrieve eSign PDF's				
<input checked="" type="checkbox"/> Retrieve eSign Messages				
<b>Product:</b>				
Underwriting	10	53	12/9/2020 1:41:00 PM	eSign?

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

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



# Loan Producer

eSign

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

The screenshot displays the Loan Producer interface for Loan Number: 7222019130 (John and Mary Sample). The interface is divided into several sections:

- Left Navigation Panel:** Contains menu items such as 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, and Radstar.
- Document Services Interface:** Shows details for the loan, including Product (Initial Disclosures - Refinance), # of Documents (26), # of Messages (53), and Date Ordered (1/20/2021 10:17:00 AM). It lists various documents like Loan Detail Report, Evidence of Joint Application, and Uniform Residential Loan Application. A 'Menu' is open, highlighting the 'Retrieve eSign Messages' option.
- DocMagic Messages:** A pop-up window showing a table of events returned from DocMagic.

Create Date	Created By	Event Type	Note	IP Address
12/16/2020 10:01 PM		REQUEST_PAPER_COPY	eSign event expired	10.1.131.33
12/15/2020 11:01 AM		NOTE_TO_SENDER	Reminder sent to kristaharris@fics.com (eSign Reminder [Loan Number: 7222019130])	10.1.131.33
12/14/2020 11:01 AM	krista.harris2013@att.net	CREATE_SIGREQ	eSign event created	10.1.131.34
12/14/2020 11:01 AM	krista.harris2013@att.net	SEND_SIGREQ_INVITE	Invitation sent to krista.harris2013@att.net	10.1.131.34
12/14/2020 11:01 AM	kristaharris@fics.com	SEND_SIGREQ_INVITE	Invitation sent to kristaharris@fics.com	10.1.131.34



# Loan Producer

eSign

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

The screenshot displays the Document Services Interface for Loan Number: 7222019130 (John and Mary Sample). The interface includes a left-hand navigation menu with categories like Loan Application, General Information, Borrowers, Taxes & Insurance, Closing Costs, Data Transfer, Tracking, Underwriting, Closing & Funding, Secondary Marketing, Review, Memos, Miscellaneous Fields, Documents, and Radstar. The main content area shows a table with columns for Product, # of Documents, # of Messages, Date Ordered, and eSign?. The table lists 26 documents for the product 'Initial Disclosures - Refinance'. A menu is open over the document list, showing options such as 'Delete Package', 'View Messages (53)', 'Re-Submit Package', 'Disclose To Borrower', 'Open in DocMaster', 'Retrieve eSign PDF's', and 'Retrieve eSign Messages'. A message box is overlaid on the screen, stating 'Response for Loan Number: 7222019130 (John and Mary Sam...)' and 'No Signed Documents Available.' with an 'OK' button.

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



# Loan Producer

## Disclose to Borrower

Next, click Disclose to Borrower.

The screenshot displays the Document Services Interface for Loan Number: 7222019130 (John and Mary Sample). The interface is divided into a left sidebar and a main content area. The sidebar contains a navigation menu with the following items: 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, and Radstar. The main content area shows a table of documents and a context menu. The table has columns for Product, # of Documents, # of Messages, Date Ordered, and eSign?. The first row is for 'Initial Disclosures - Refinance' with 26 documents and 53 messages, ordered on 1/20/2021 at 10:17:00 AM. The second row is for 'Underwriting' with 10 documents and 53 messages, ordered on 12/9/2020 at 1:41:00 PM. The context menu is open over the first row, showing options: Delete Package, View Messages (53), Re-Submit Package, Disclose To Borrower (highlighted), Open in DocMaster, Retrieve eSign PDF's, and Retrieve eSign Messages. A blue arrow points from the text box above to the 'Disclose To Borrower' option.

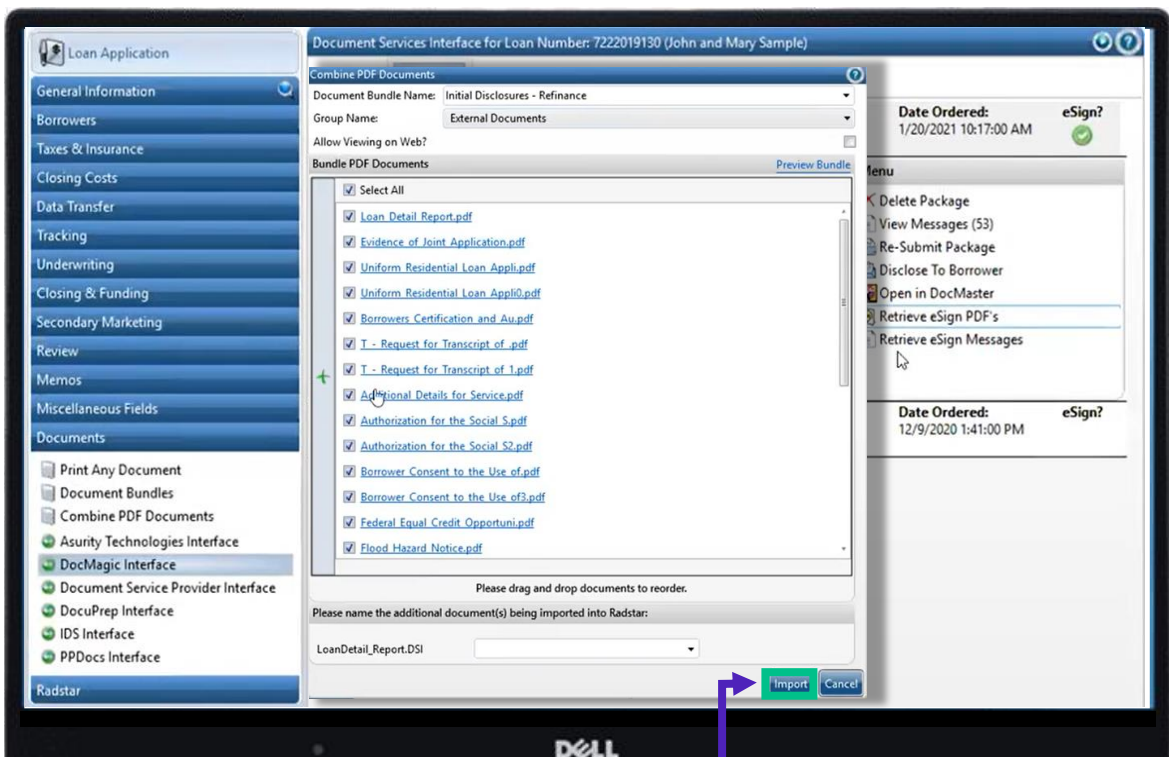
This creates a record to indicate that the Loan Estimate was disclosed and sets tolerances for the baseline because there is a Loan Estimate in the package.



# Loan Producer

## Combine PDF Documents

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



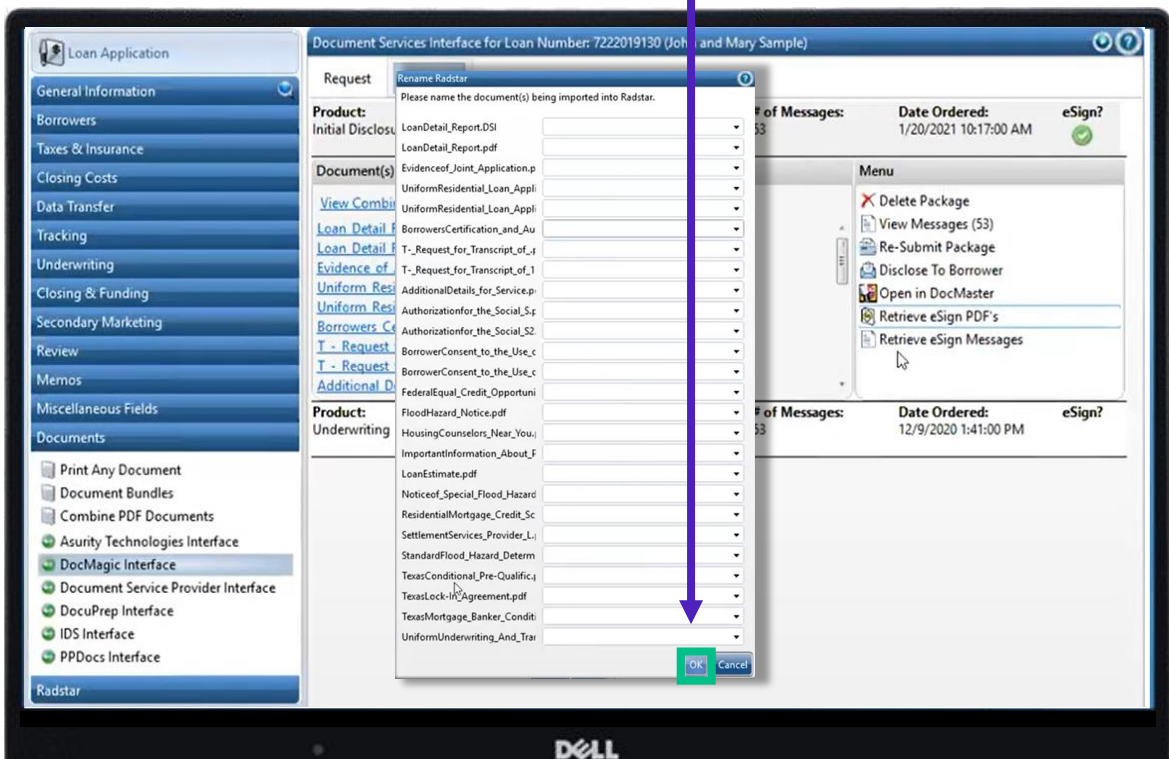
Click here to Import.



# Loan Producer

Bypass

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

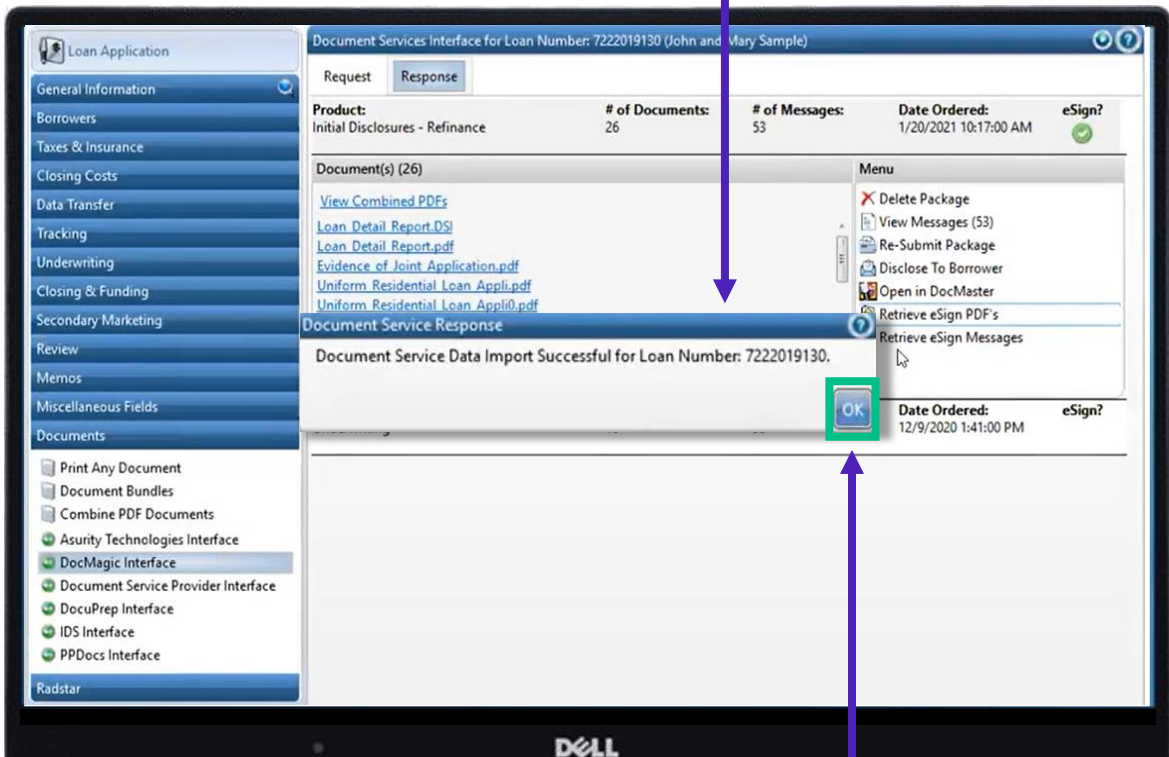




# Loan Producer

Success

This window appears telling you that everything was successful.



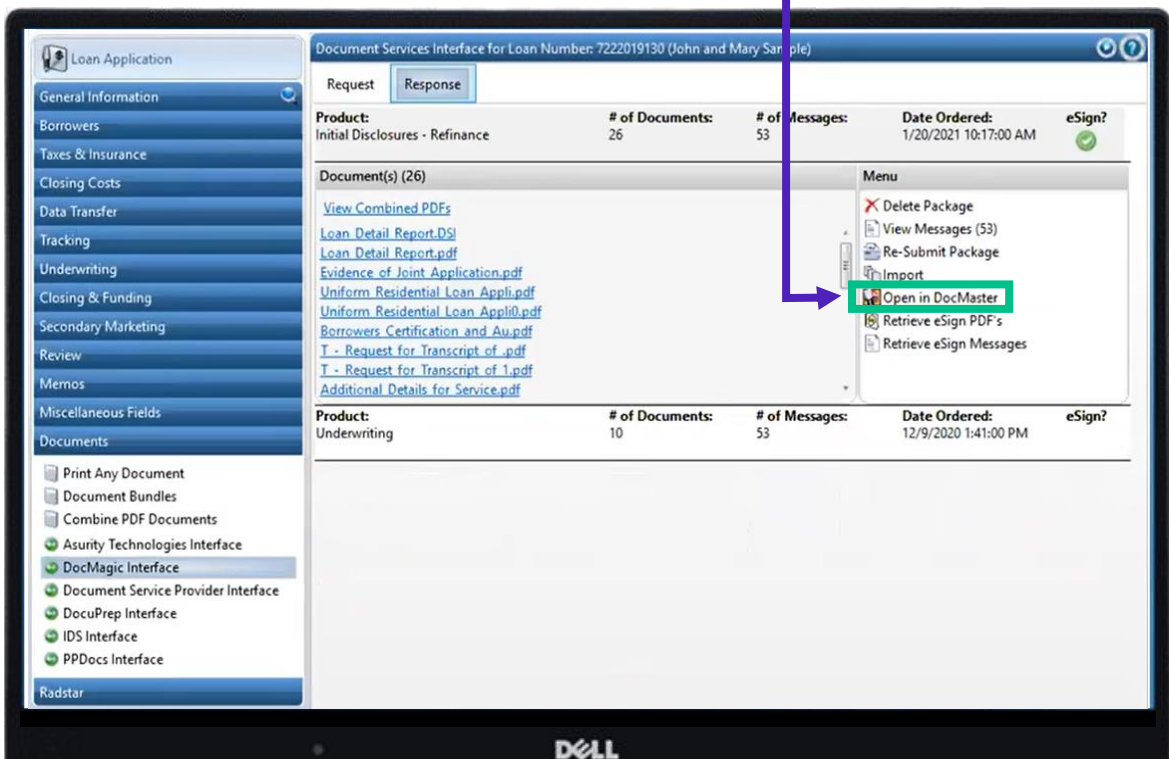
Click OK.



# 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.

