



BytePro User Guide

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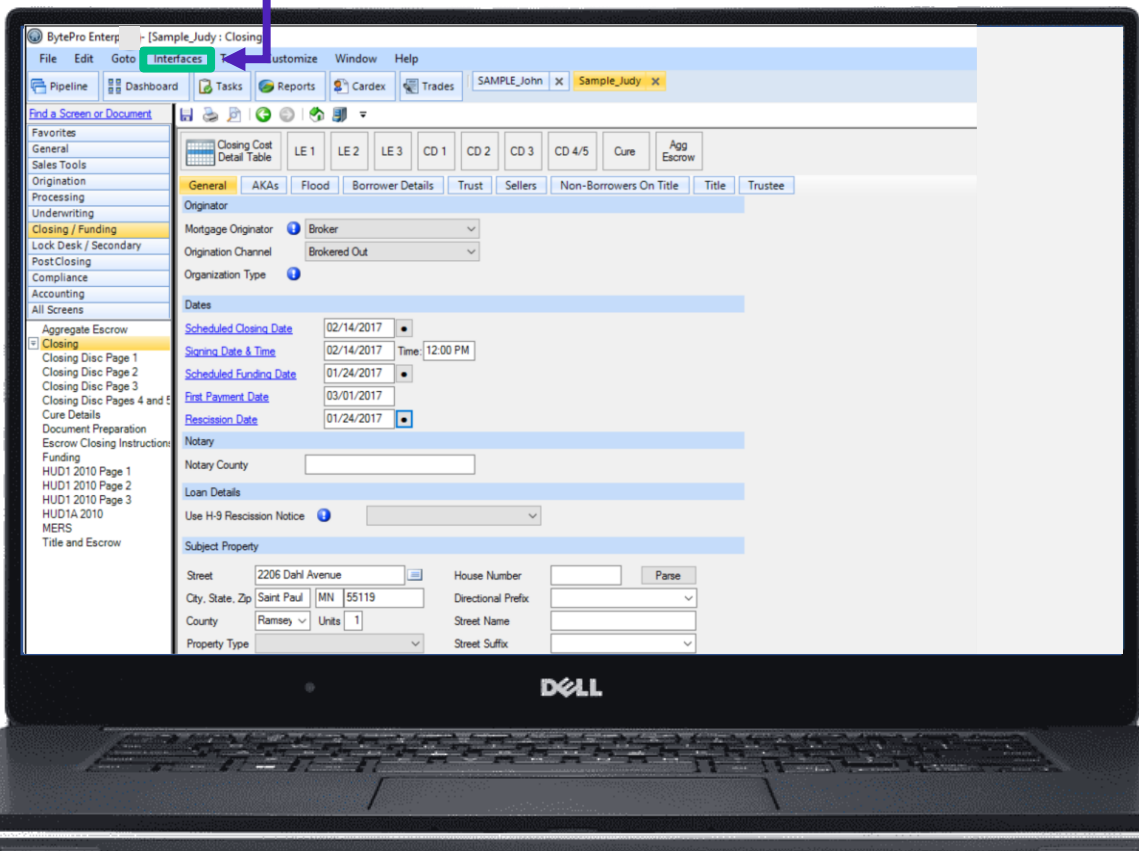
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Generating Packages From Byte

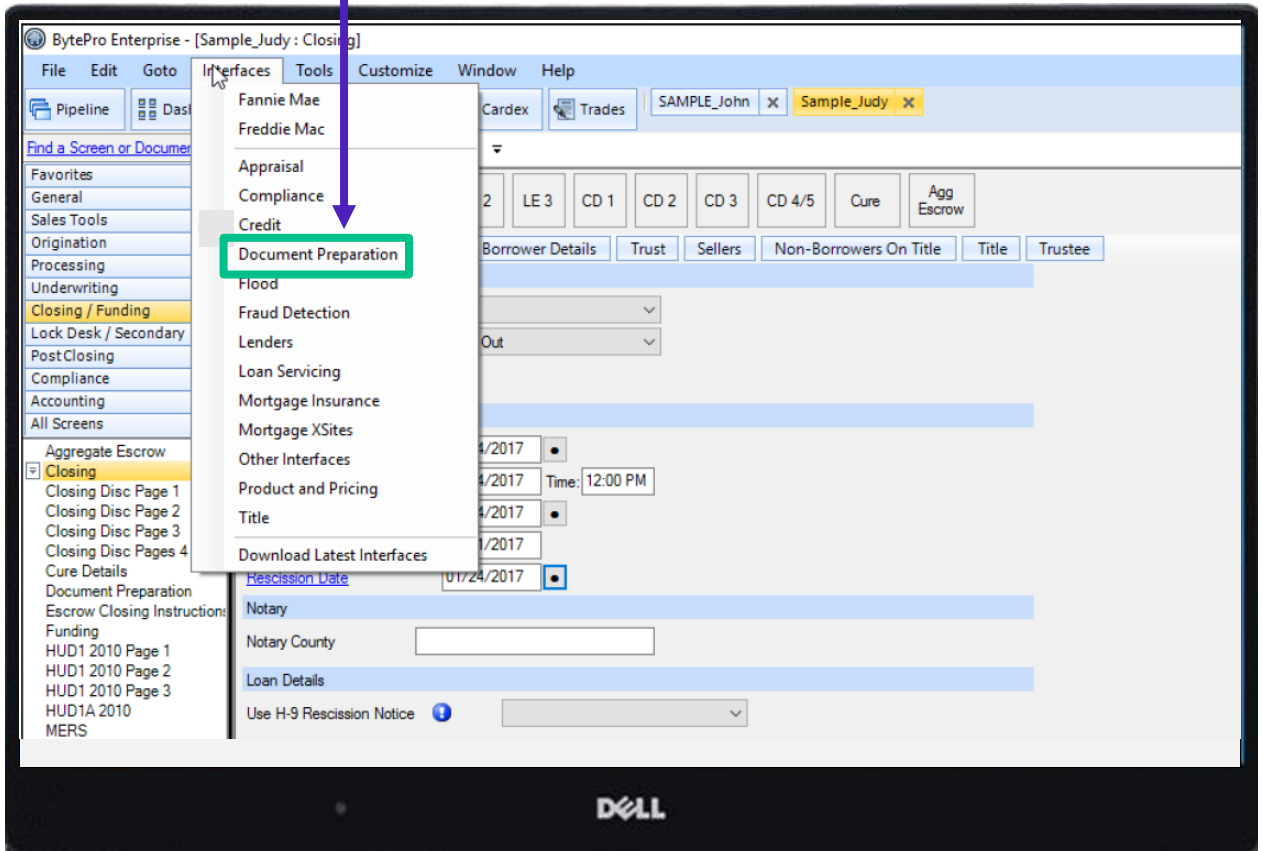
Introduction

To generate documents in BytePro, start by clicking on the Interfaces option on the Byte toolbar.



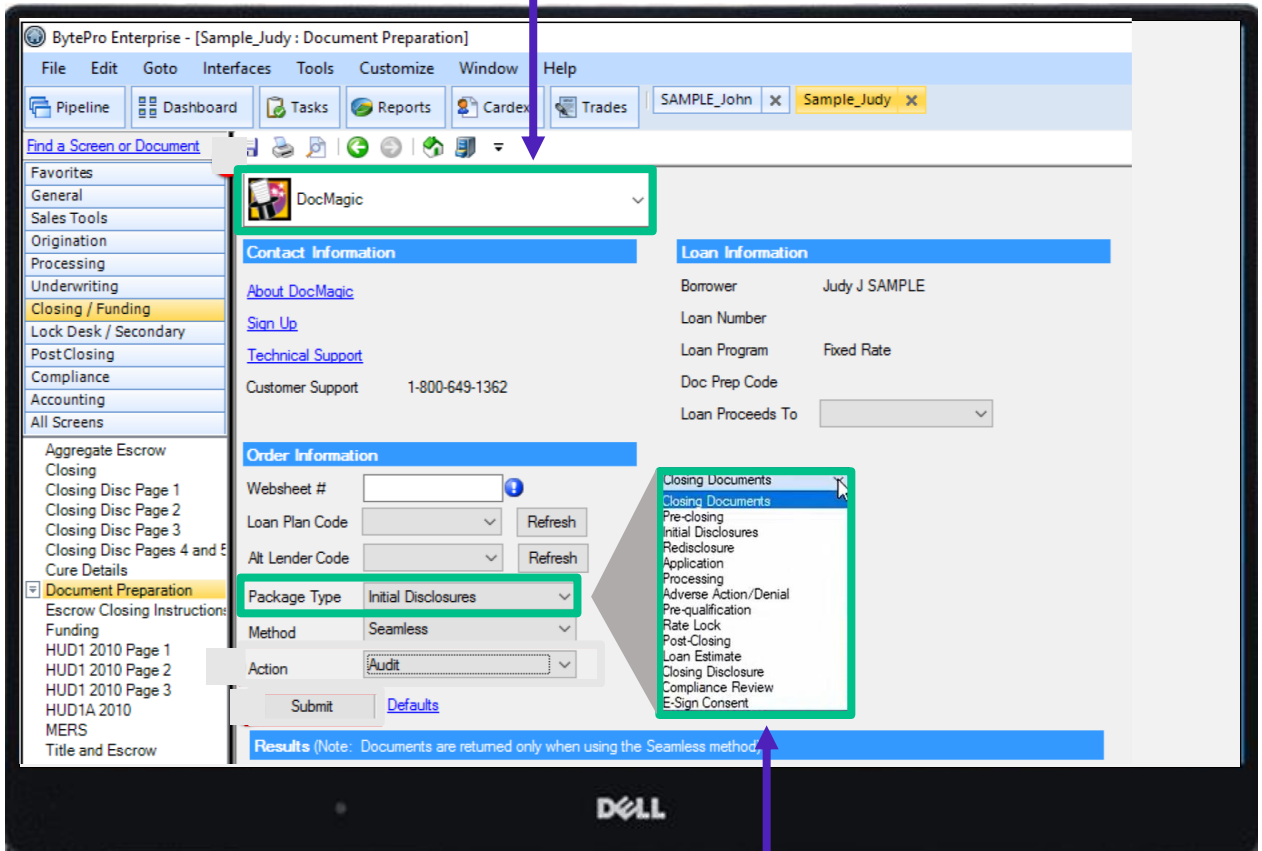
Generate Packages From Byte

Select Document Preparation.



Generate Packages From Byte

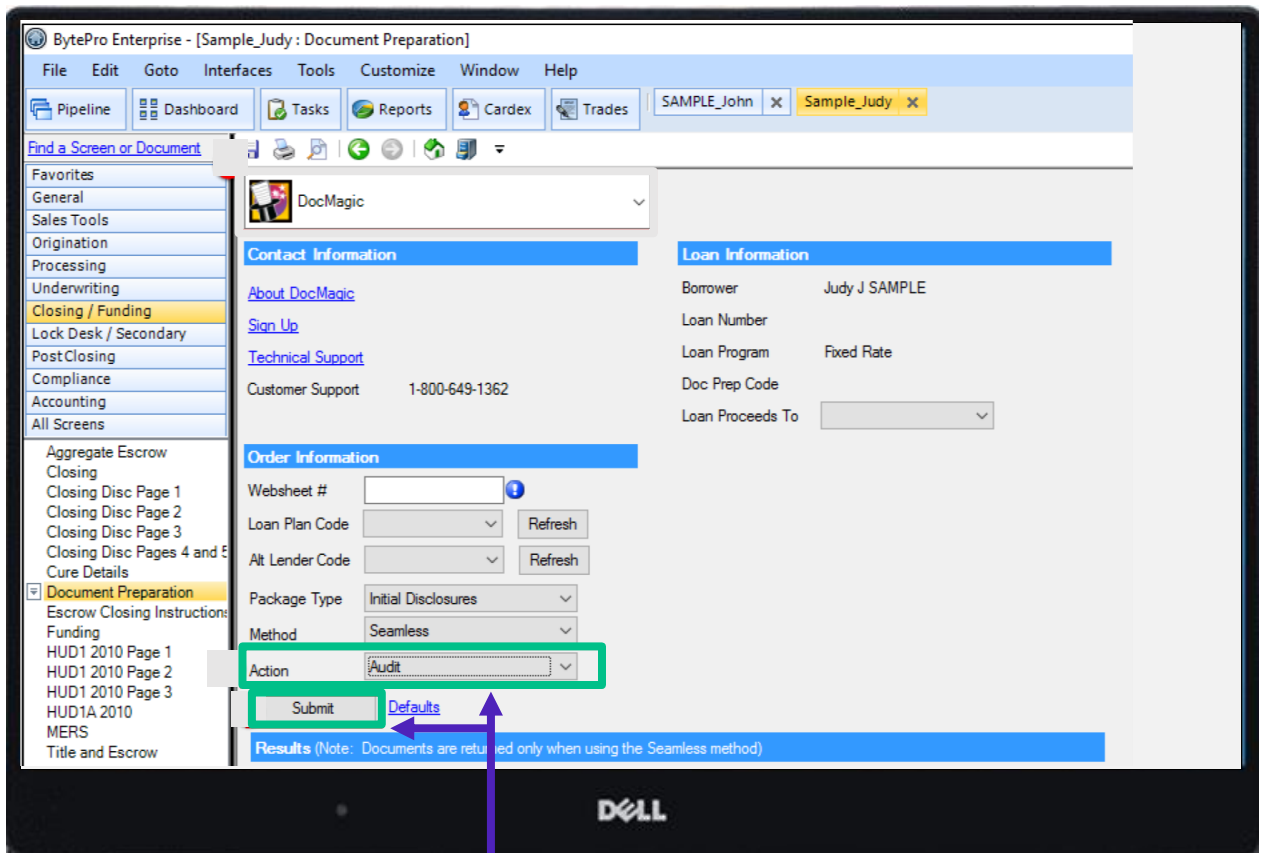
Select DocMagic.



Choose your package type from this drop-down menu.



Generate Packages From Byte

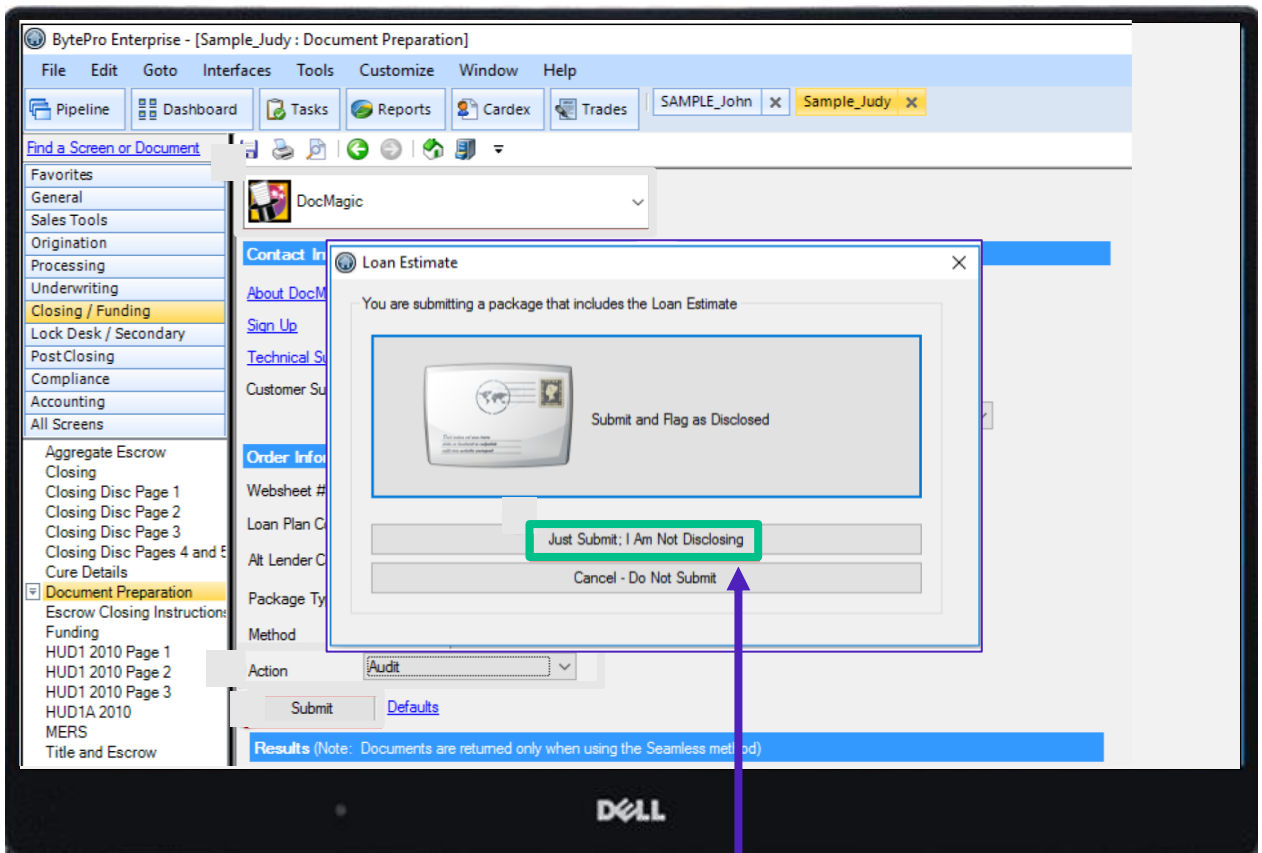


Select Audit under Action,
then Submit.



Generate Packages From Byte

A pop-up box will appear.



When running an Audit, select "Just Submit; I Am Not Disclosing" since the only action will be auditing the file.



Generate Packages From Byte

Review the Audit messages in the Status Messages box.

The screenshot shows a software interface with a sidebar on the left containing a tree view of document preparation steps. The main area is divided into several sections:

- Order Information:** A form with fields for Websheet # (1), Loan Plan Code, Alt Lender Code, Package Type (Initial Disclosures), Method (Seamless), and Action (Audit). There are 'Submit' and 'Defaults' buttons.
- Results:** A blue header bar with the text: "Results (Note: Documents are returned only when using the Seamless method)".
- Status Messages (double-click to view long messages):** A table with columns 'Date' and 'Message'. The messages are:

Date	Message
1/24/17 5:08:53 PM	Info: Worksheet Audited (outstand
1/24/17 5:08:53 PM	Info: Worksheet Audit complete
1/24/17 5:08:53 PM	Warning: Seller information is miss
1/24/17 5:08:53 PM	Warning: Intent to service or trans
1/24/17 5:08:53 PM	Warning: You have entered an in
1/24/17 5:08:53 PM	Warning: Purchase Transaction w
1/24/17 5:08:53 PM	Warning: Only escrowed items inc
- Documents (double-click on a document to view it):** A table with columns 'Date' and 'Name', currently empty.

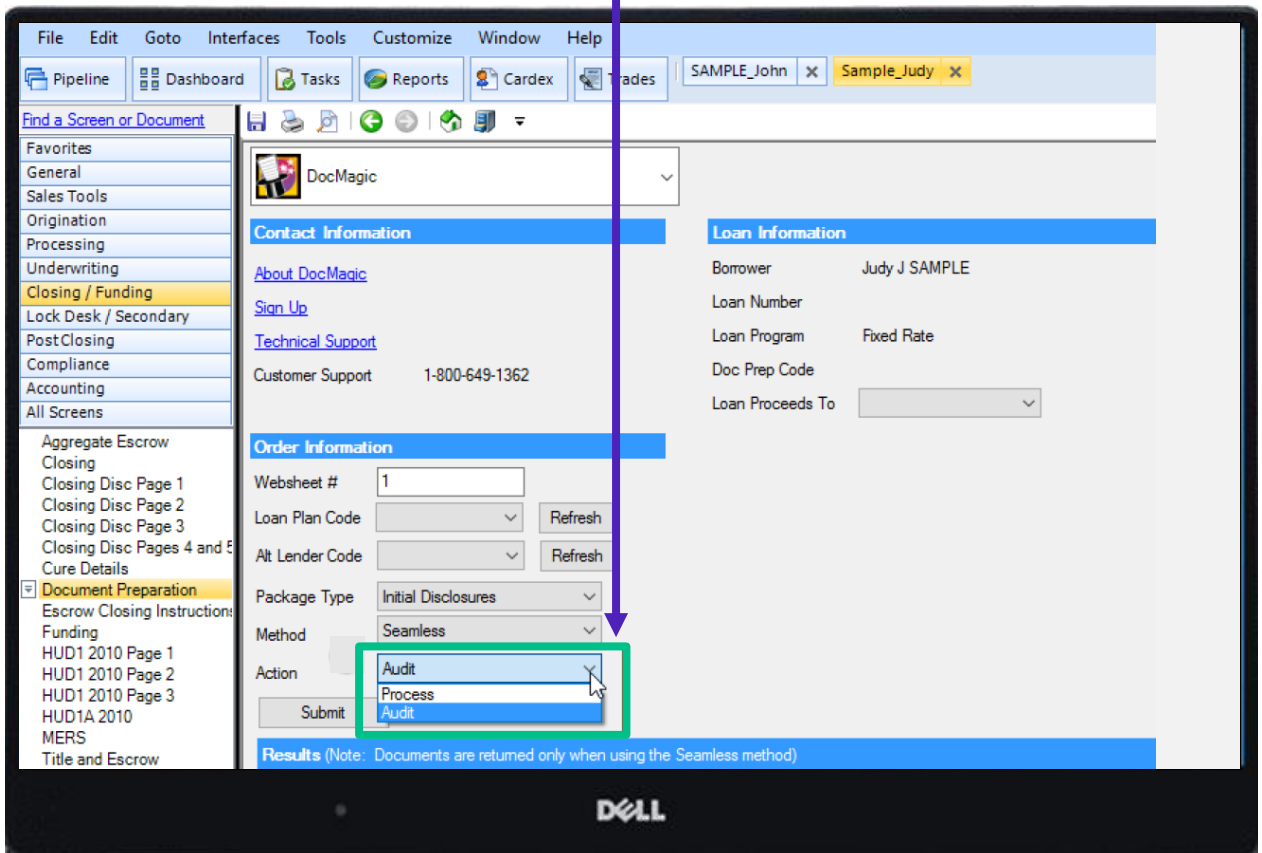
A green box highlights the 'Status Messages' table, and a blue arrow points from the text above to it. At the bottom of the interface, there are buttons for 'View Messages in New Window ...' and 'View Documents in New Window ...'. The Dell logo is visible at the bottom center of the screen.

If there are any Fatal messages, the package cannot be processed until the errors are corrected.



Generate Packages From Byte

When it is time to process the package (Initial or Closing), in the Action drop down, select Process.



If there are any Fatal messages, the package cannot be processed until the errors are corrected.



Generate Packages From Byte

In the Order Information section, set the Plan Code, Alt Lender Code, Package Type and Method as appropriate.

Optional – In the Delivery Options section, select eSign or E-mail to send the package electronically.

BytePro Enterprise - [Sample_Judy : Document Preparation]

File Edit Goto Interfaces Tools Customize Window Help

Pipeline Dashboard Tasks Reports Cards Trades SAMPLE_John x Sample_Judy x

Find a Screen or Document

Favorites

- General
- Sales Tools
- Origination
- Processing
- Underwriting
- Closing / Funding
- Lock Desk / Secondary
- PostClosing
- Compliance
- Accounting
- All Screens

Aggregate Escrow

- Closing
- Closing Disc Page 1
- Closing Disc Page 2
- Closing Disc Page 3
- Closing Disc Pages 4 and 5
- Cure Details
- Document Preparation
- Escrow Closing Instructions
- Funding
- HUD1 2010 Page 1
- HUD1 2010 Page 2
- HUD1 2010 Page 3
- HUD1A 2010
- MERS
- Title and Escrow

DocMagic

Contact Information

About DocMagic

Sign Up

Technical Support

Customer Support 1-800-649-1362

Loan Information

Borrower Judy J SAMPLE

Loan Number

Loan Program Fixed Rate

Doc Prep Code

Loan Proceeds To

Order Information

Websheet # 1

Loan Plan Code Refresh

Alt Lender Code Refresh

Package Type Closing Documents

Method Seamless

Action Process

Submit Defaults

Delivery Options

DocMagic eSign

- Signature Enable
- Event Notification

E-Mail Secure Link to

- Require Password
- Retrieval Notification

Results (Note: Documents are returned only when using the Seamless method)

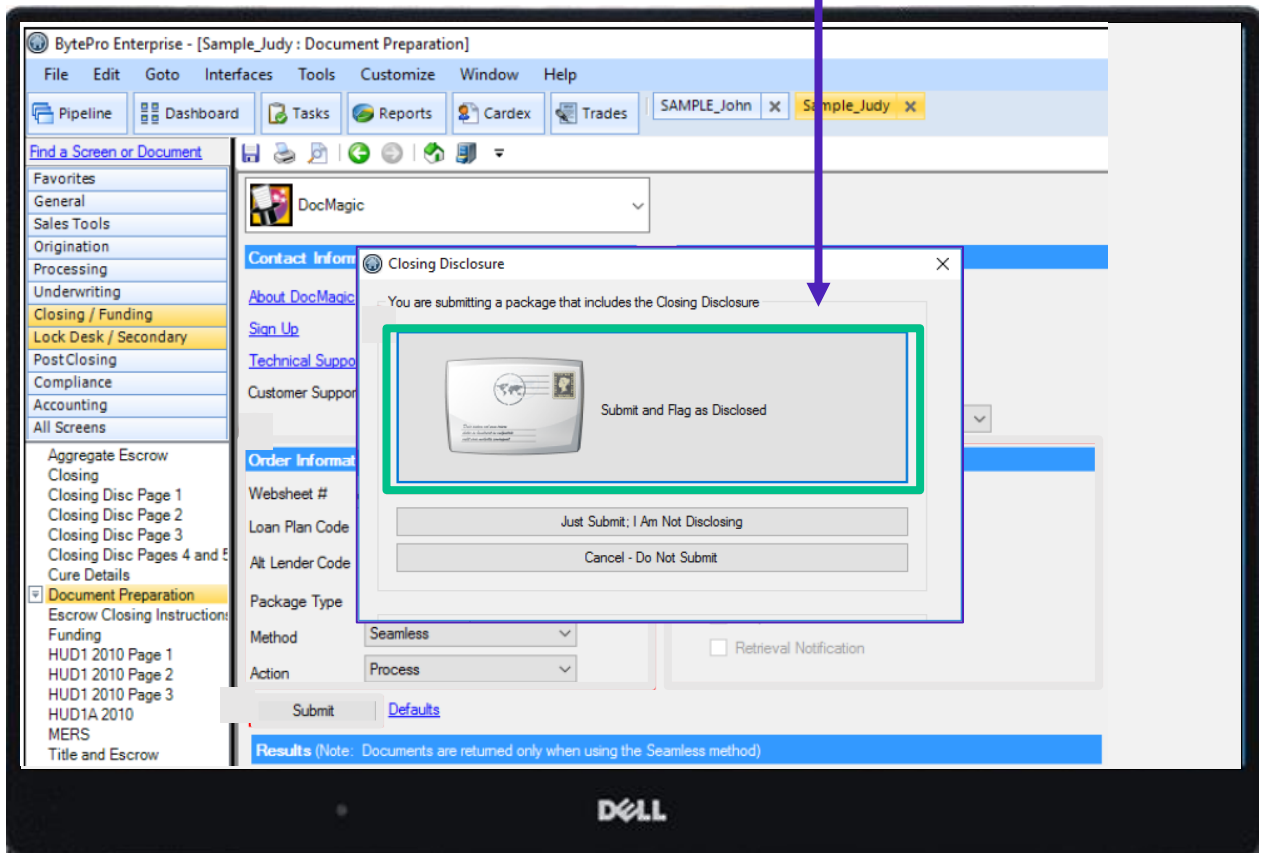
DELL

Click Submit.



Generate Packages From Byte

To process the package and Flag as Disclosed, select that option.



Generate Packages From Byte

Processed documents will be visible in the Documents Window.

The screenshot displays a software interface with several sections:

- Order Information:** Includes fields for Websheet # (1), Loan Plan Code (DSI_CONV - ALL), Alt Lender Code, Package Type (Closing Documents), Method (Seamless), and Action (Process). Buttons for Submit and Defaults are present.
- Delivery Options:** Includes checkboxes for DocMagic eSign, Signature Enable, Event Notification, E-Mail Secure Link to, Require Password, and Retrieval Notification.
- Results:** A section titled "Results (Note: Documents are returned only when using the Seamless method)" containing two tables.

The **Documents** table is highlighted with a green border and contains the following data:

Date	Name
Processed documents will appear here.	

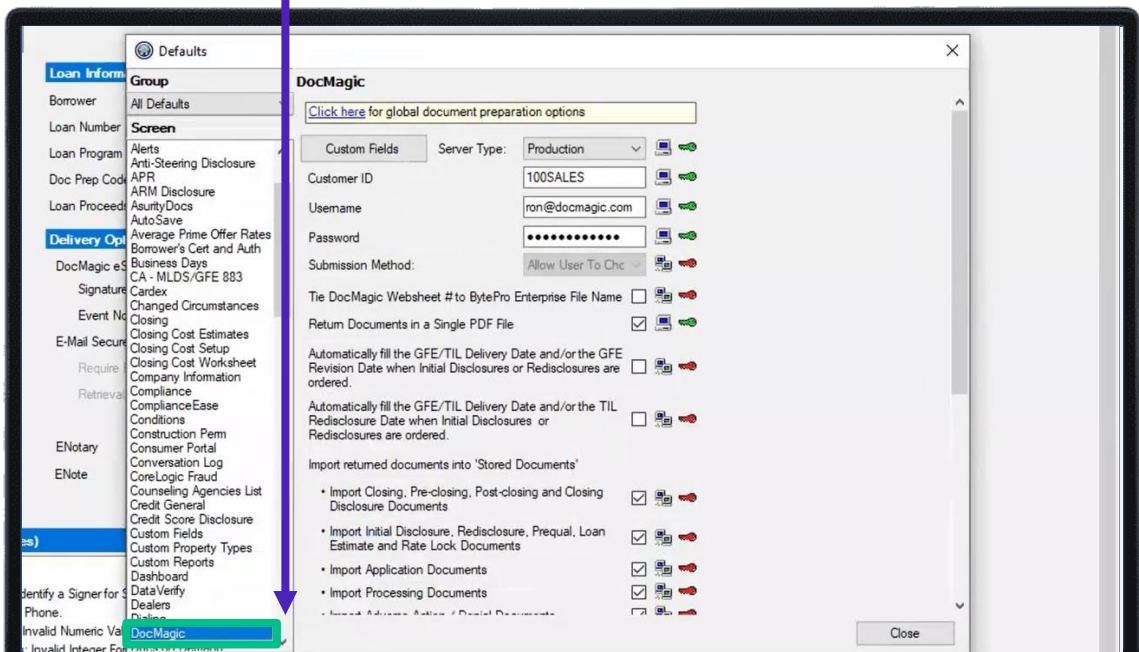
Double-click on a document to view.



Administration

The remainder of this guide focuses on the DocMagic defaults screen in BytePro.

To access the default screen, select Customize → Defaults → DocMagic.



User Credentials

Enter Customer ID, Username, and Password.

The screenshot shows the 'Defaults' window for the 'DocMagic' group. The 'Group' is set to 'All Defaults'. The 'Screen' is set to 'Screen'. The 'Server Type' is set to 'Production'. The 'Customer ID' is '100SALES', the 'Username' is 'ron@docmagic.com', and the 'Password' is masked with dots. The 'Submission Method' is 'Allow User To Chc'. There are several checkboxes for document import options, such as 'Import Closing, Pre-closing, Post-closing and Closing Disclosure Documents', 'Import Initial Disclosure, Redisclosure, Prequal, Loan Estimate and Rate Lock Documents', 'Import Application Documents', and 'Import Processing Documents'. A 'Close' button is at the bottom right.

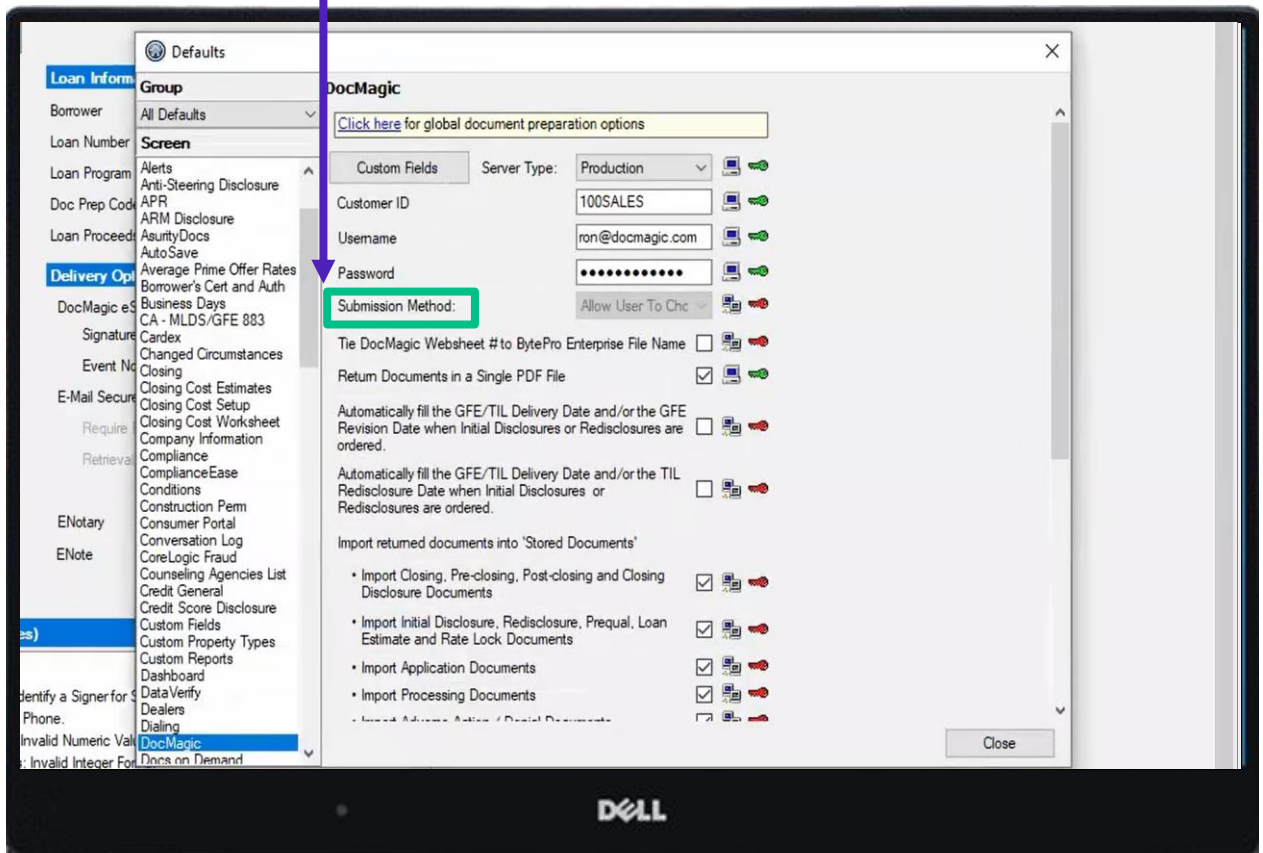
These are the user credentials provided by DocMagic.



Submission Method

There are two types of submission methods:

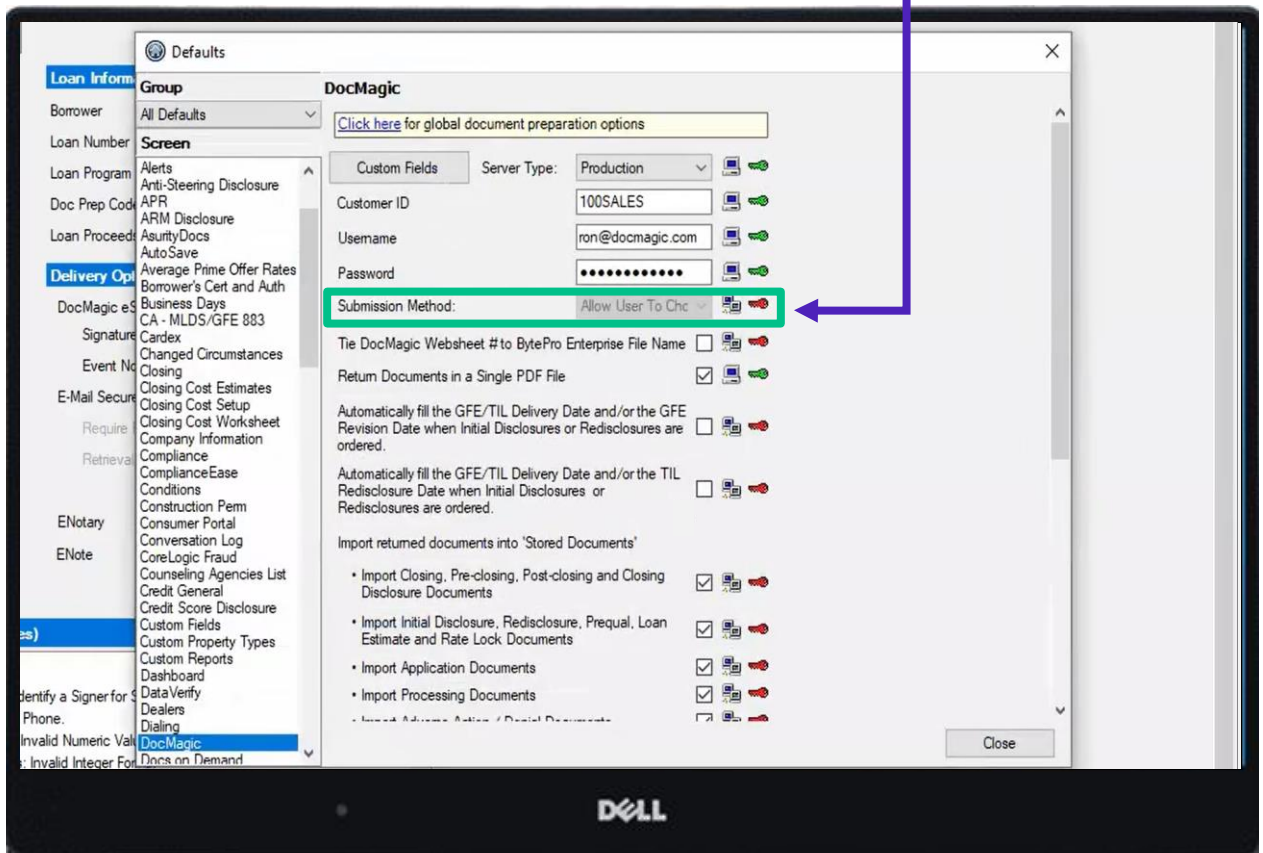
1. Seamless – “Lights Out”
2. Browser – launches a user to the DocMagic website where they submit their documents for processing.



Submission Method

There are three types of submission method settings:

1. Always Seamless
2. Always Browser
3. Allow User to Choose



Submission Method

The screenshot below displays the screen that is presented to the end-user when "Allow User to Choose" is selected.

The screenshot displays the DocMagic web application interface. The top left corner features the DocMagic logo. The main content area is divided into several sections:

- Contact Information:** Includes a link to the DocMagic Web Site and Customer Support information (1-800-649-1362).
- Order Information:** Contains fields for Worksheet # (138), Loan Plan Code (DSI_CONV - ALL), Alt Lender Code, Package Type (Closing Documents), Method (Seamless), and Action (Process). The Method dropdown is highlighted with a green box and a blue arrow pointing to it from the text box above.
- Loan Information:** Displays Borrower (Ron Sample), Loan Number (123), Loan Program (Fixed Rate), Doc Prep Code (DSI_CONV), and Loan Proceeds To (dropdown).
- Delivery Options:** Includes checkboxes for DocMagic eSign, Signature Enable, Event Notification, E-Mail Secure Link to, Require Password, and Retrieval Notification.

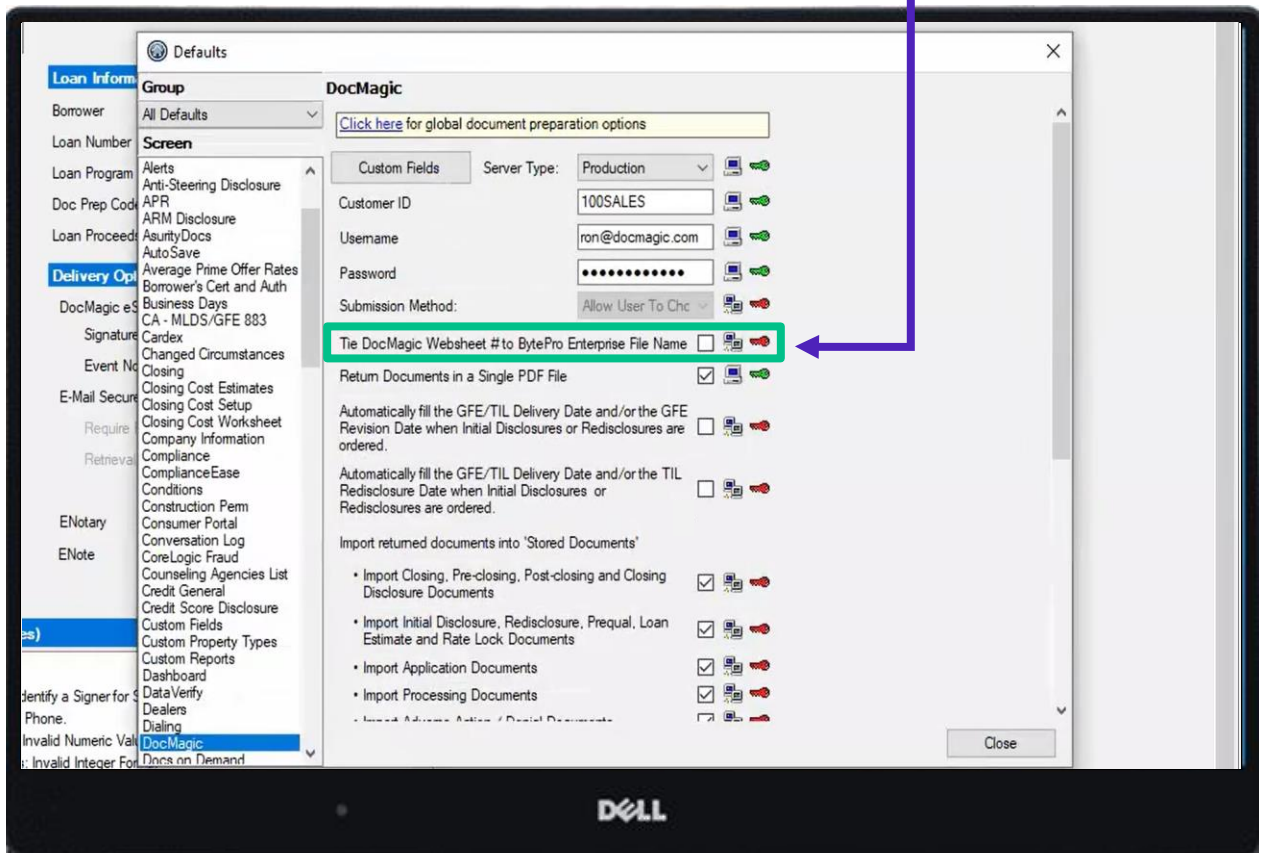
At the bottom left, there are buttons for Submit and Defaults. The Dell logo is visible at the bottom center of the screen.

By allowing the user to choose a method, the option will be available to them at the loan level when ordering documents.



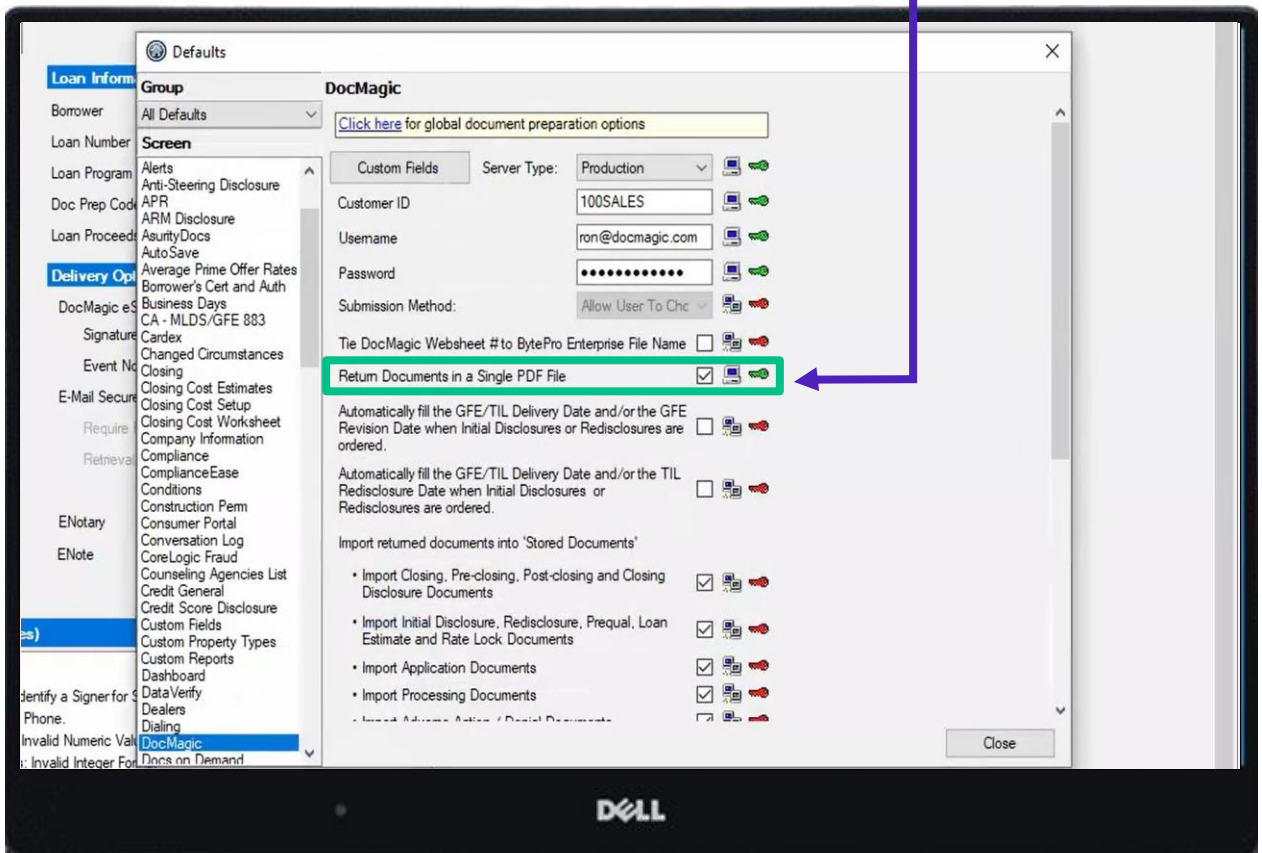
DocMagic Worksheet Number

This setting allows the user to tie the DocMagic Worksheet number to the BytePro Enterprise File Name so that they are always the same.



Return Documents in a Single PDF

This option determines if the documents returned by DocMagic will be in a single PDF or split out based on document type.



If this option is not selected, DocMagic returns individual documents.



Auto-fill the GFE/TIL Delivery Dates

The following settings will only apply to GFE/TIL loans and will not be applicable for TRID loans.

Defaults

Group DocMagic

[Click here for global document preparation options](#)

Custom Fields Server Type: Production

Customer ID: 100SALES

Username: ron@docmagic.com

Password: [REDACTED]

Submission Method: Allow User To Chc

Tie DocMagic Worksheet # to BytePro Enterprise File Name

Return Documents in a Single PDF File

Automatically fill the GFE/TIL Delivery Date and/or the GFE Revision Date when Initial Disclosures or Redisclosures are ordered.

Automatically fill the GFE/TIL Delivery Date and/or the TIL Redisclosure Date when Initial Disclosures or Redisclosures are ordered.

Import returned documents into 'Stored Documents'

- Import Closing, Pre-closing, Post-closing and Closing Disclosure Documents
- Import Initial Disclosure, Redisclosure, Prequal, Loan Estimate and Rate Lock Documents
- Import Application Documents
- Import Processing Documents
- Import Address Action / Debit Documents

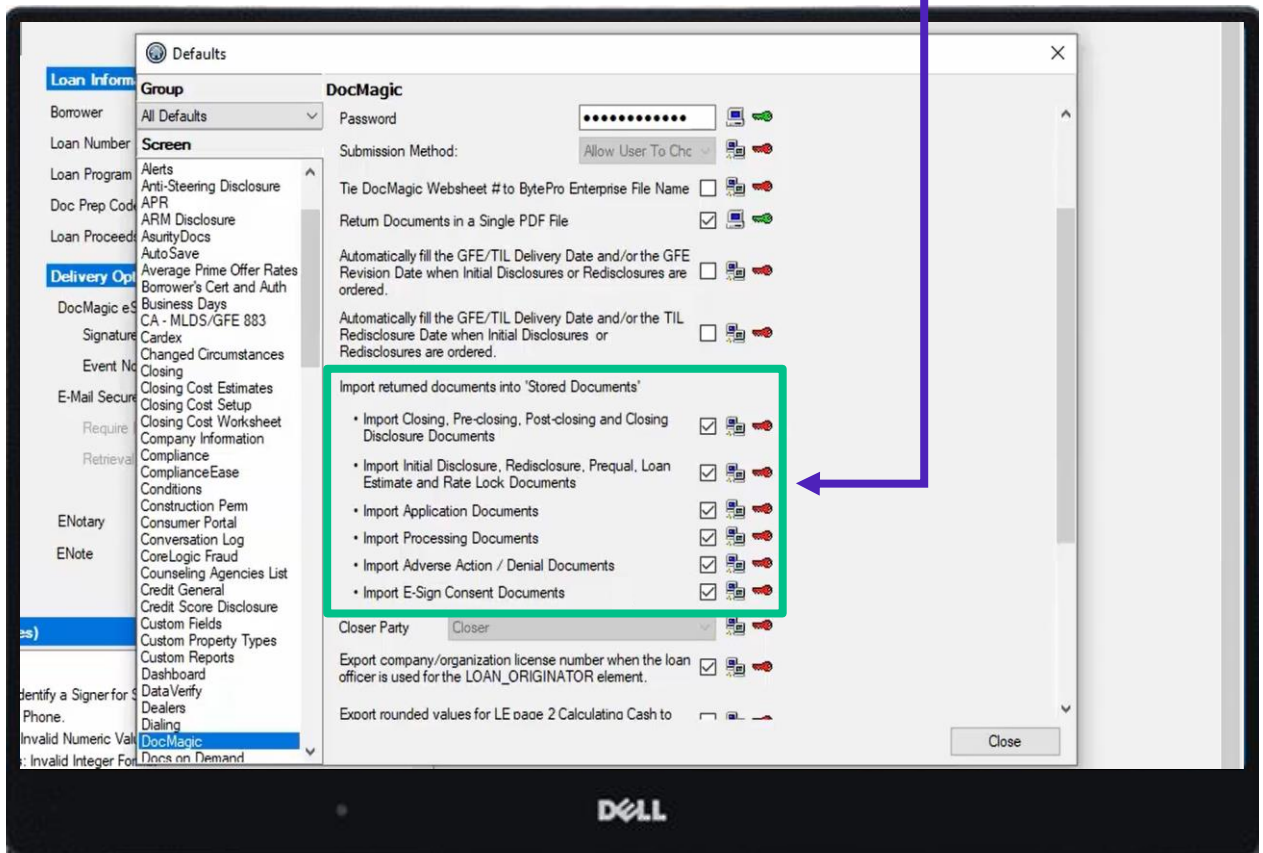
Close

These settings will automatically fill either the GFE Revision Date or TIL Redisclosure Date when selected.



Import Document Settings

These settings allow the ability to select which document package types will be automatically stored in Stored documents.

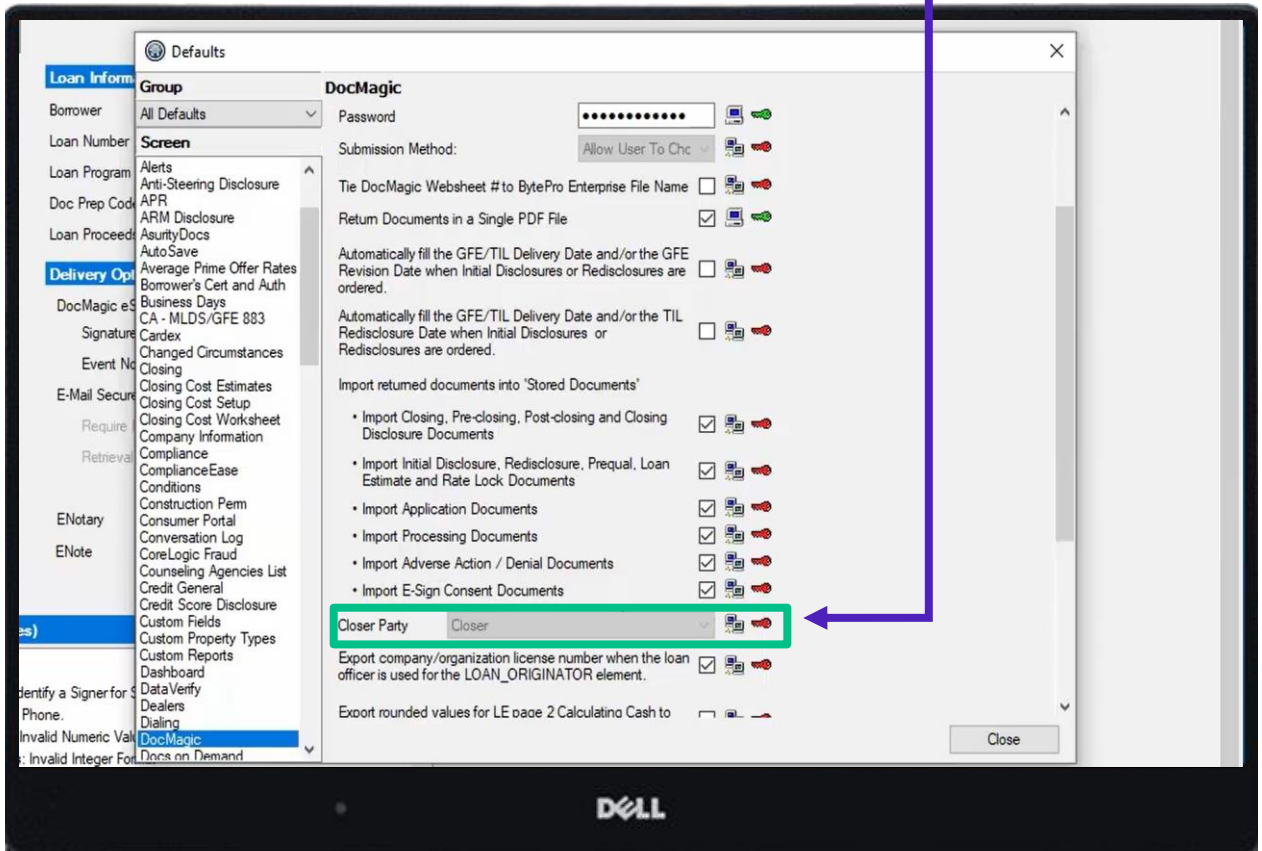


The six options correspond with the Package Type selected at the loan level for processing.



Closer Party

This setting will determine which party in BytePro is considered the "Closer Party" in DocMagic.

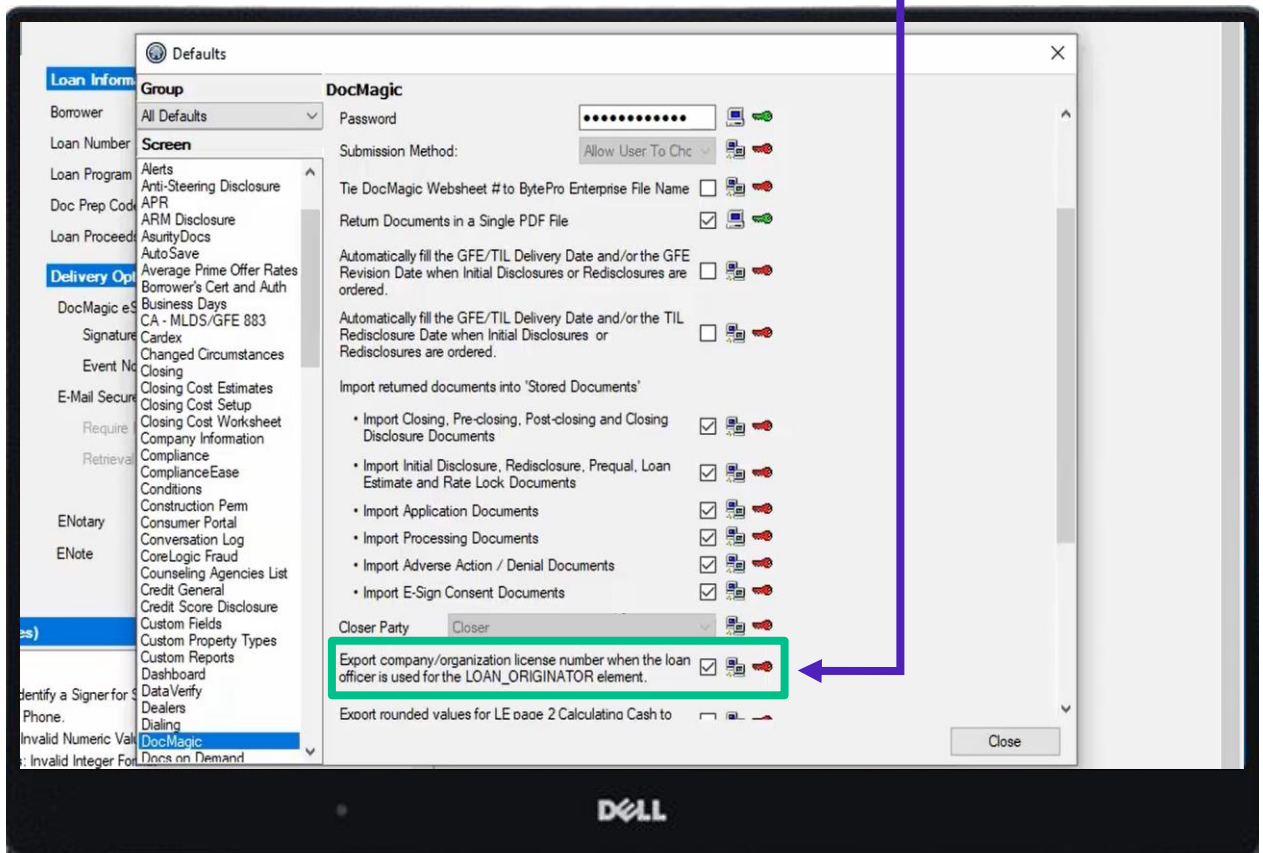


By selecting a party from the drop down, BytePro will send that information to DocMagic to be listed as the Closer Party documents.



Company/Organization License Number

This setting allows a “retail” organization to transmit their company license information for certain state disclosures.



Checking this setting allows the company license entered on the loan officer party to be exported for retail organization types.



Loan Program

An administrator can select which DocMagic Loan Plan Code will be defaulted into the loan based on the loan program selected at the loan level.

The screenshot displays the DocMagic software interface. On the left, there are sections for 'Contact Information' (DocMagic Web Site, Customer Support 1-800-649-1362) and 'Order Information' (Worksheet # 138, Loan Plan Code DSI_CONV - ALL, Alt Lender Code, Package Type Closing Documents, Method Seamless, Action Process). The main area is titled 'Defaults' and contains a 'Loan Programs' menu. A blue arrow points to the 'Loan Programs' option in this menu. The right side of the interface shows the 'Edit Loan Program' form for a 'FixedRate' program, with fields for General settings, Origination Channels, Loan Program Code, Loan Program Name, Mortgage Type, ATR Assessment, Amortization Type, LTV Rounding, LTV Calc Method, Note Rate, Qual Rate, Term, Interest Only Period, Bi-weekly Loan, Buydowns, and Doc Prep Code (DSI_CONV).

Go to Defaults → Loan Programs.
Select a loan program to bring up
the Edit Loan Program menu.



Loan Program

The selected BytePro loan program may contain an associated 'Doc Prep Code'.

The screenshot shows the DocMagic interface for editing a loan program. On the left, there are sections for 'Contact Information' (DocMagic Web Site, Customer Support 1-800-649-1362) and 'Order Information' (Worksheet # 138, Loan Plan Code DSI_CONV - ALL, Package Type Closing Documents, Method Seamless, Action Process). A central sidebar lists various categories like 'Screen', 'Loan Programs', and 'Closing Documents'. The 'Loan Programs' section is active, showing a table with columns for Code, Name, and Mortgage Type. Below this is the 'Edit Loan Program' form with the following fields: General (Disabled), Origination Channels (Any), Loan Program Code (FixedRate), Loan Program Name (Conventional), Mortgage Type (Conventional), ATR Assessment, Amortization Type (Fixed), LTV Rounding (Default), LTV Calc Method (Standard), Note Rate (4.000%), Qual Rate (4.000%), Term (360), Interest Only Period, Bi-weekly Loan, Buydowns (None), and Doc Prep Code (DSI_CONV). A blue arrow points from the text box above to the Doc Prep Code field.

You may enter the DocMagic Loan Plan Code in this Doc Prep Code field.



Loan Program

If the loan program contains a doc prep code that matches a DocMagic loan plan code, then that matching loan plan code will be automatically selected for the current loan submission.

The screenshot displays the DocMagic software interface. On the left, there is a sidebar with 'Contact Information' (DocMagic Web Site, Customer Support 1-800-649-1362) and 'Order Information' (Worksheet # 138, Loan Plan Code DSI_CONV - ALL, Alt Lender Code, Package Type Closing Documents, Method Seamless, Action Process). The main area is titled 'Loan Programs' and shows a table with columns 'Code', 'Name', and 'Mortgage Type'. The table contains one entry: 'FixedRate', 'Conventional', 'Conventional'. Below the table is the 'Edit Loan Program' form, which includes fields for 'Loan Program Code' (FixedRate), 'Loan Program Name' (Conventional), 'Mortgage Type' (Conventional), 'ATR Assessment', 'Amortization Type' (Fixed), 'LTV Rounding' (Default), 'LTV Calc Method' (Standard), 'Note Rate' (4.000%), 'Qual Rate' (4.000%), 'Term' (360), 'Interest Only Period' (months), 'Bi-weekly Loan' (checkbox), 'Buydowns' (None), and 'Doc Prep Code' (DSI_CONV). A 'Submit' button and a 'Defaults' link are at the bottom left of the interface.



Loan Program

You may select the Loan Plan Code under Order Information.

The screenshot displays the DocMagic web application interface. At the top left, the DocMagic logo is visible. The interface is divided into several sections:

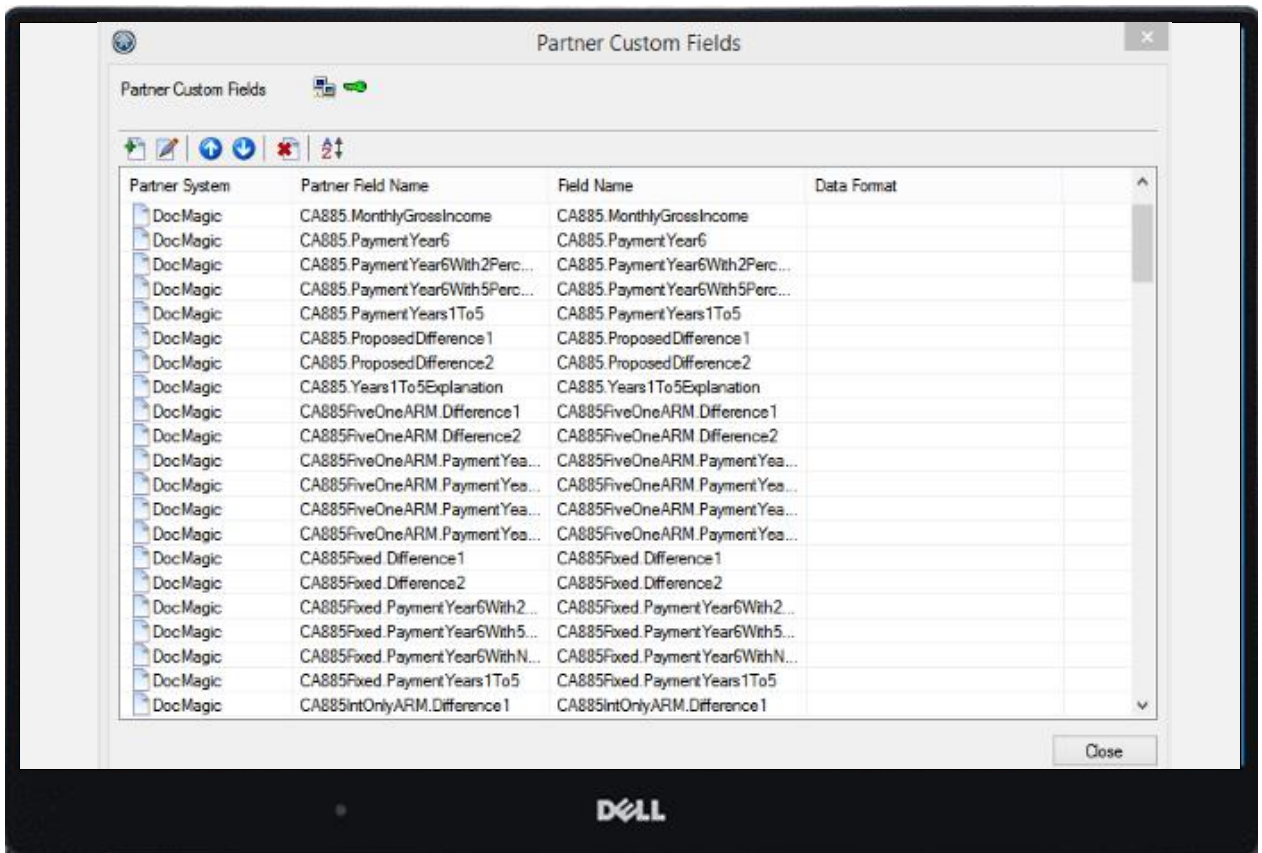
- Contact Information:** Includes a link to the DocMagic Web Site and Customer Support (1-800-649-1362).
- Order Information:** Contains fields for Websheet # (138), Loan Plan Code (DSI_CONV - ALL), Alt Lender Code, Package Type (Closing Documents), Method (Seamless), and Action (Process). A green box highlights the Loan Plan Code dropdown, and a purple arrow points to it from the text above.
- Loan Information:** Displays Borrower (Ron Sample), Loan Number (123), Loan Program (Fixed Rate), Doc Prep Code (DSI_CONV), and Loan Proceeds To (dropdown).
- Delivery Options:** Includes checkboxes for DocMagic eSign, Signature Enable, Event Notification, E-Mail Secure Link to, Require Password, and Retrieval Notification. It also has fields for ENotary and ENote.

At the bottom left, there are buttons for Submit and Defaults. The Dell logo is visible at the bottom center of the screen.



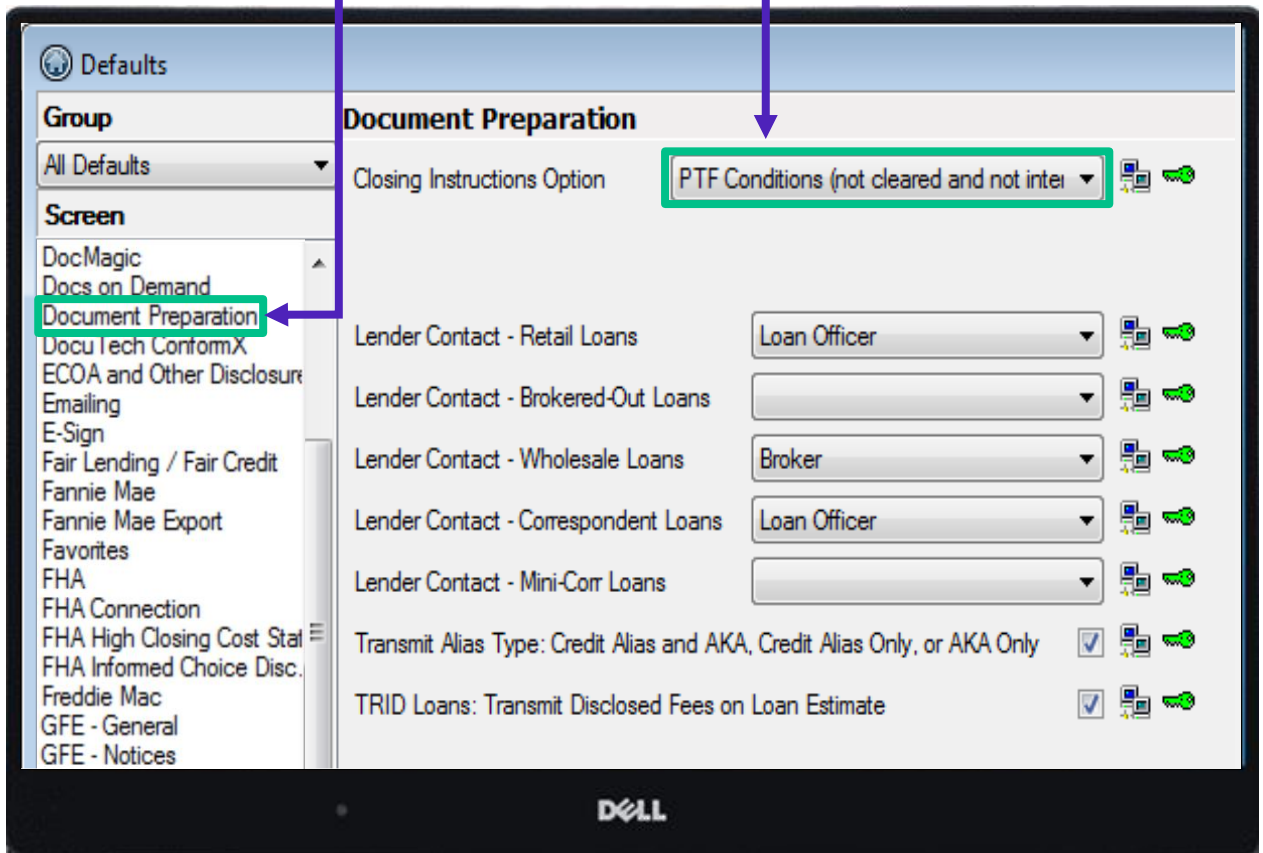
Partner Custom Fields

Utilize this screen to match custom fields to fields in DocMagic.



Document Preparation Defaults

Go to Defaults →
Document Preparation to
set the Closing Instructions.



Conditions can be pulled from
Escrow Instructions, Conditions,
or a Management Report.



Document Preparation Defaults

On this screen, you may also set the following options to be transmitted for document preparation: Lender Contact by Origination Channel, Alias Type and the option to Transmit Disclosed Fees on Loan Estimate.

