# DocMagic

BytePro User Guide

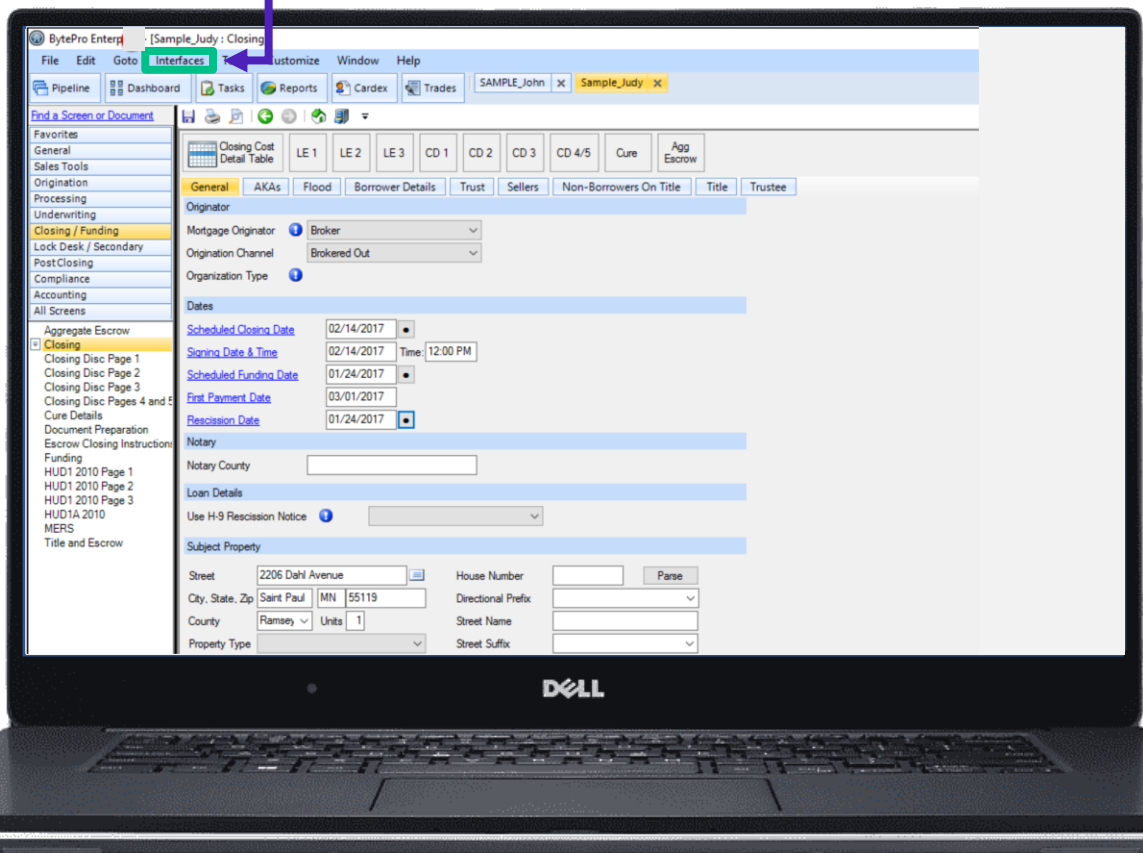# Table of Contents

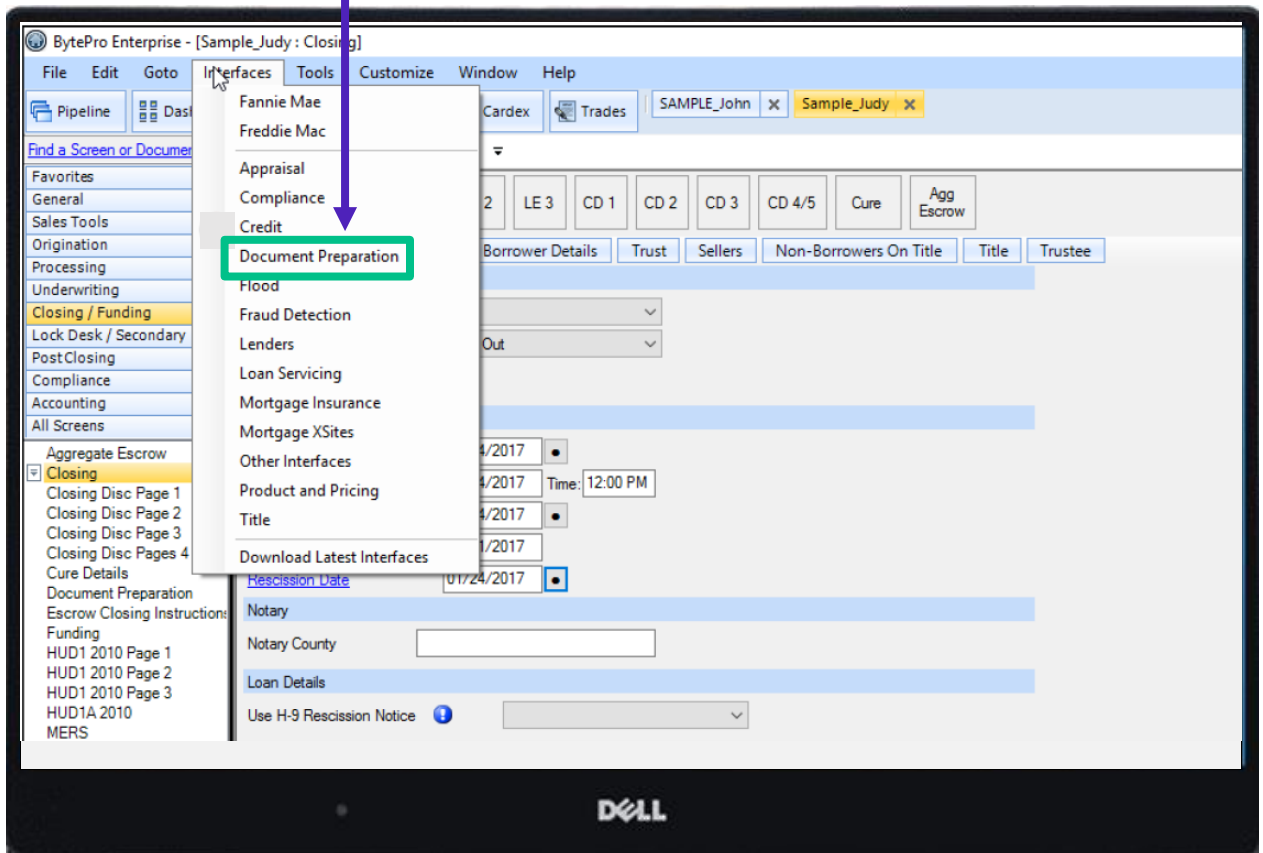# Generate Packages From Byte

## Getting Started

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

# Generate Packages From Byte

## Doc Prep

Select Document Preparation.

# Generate Packages From Byte

## Selecting DocMagic

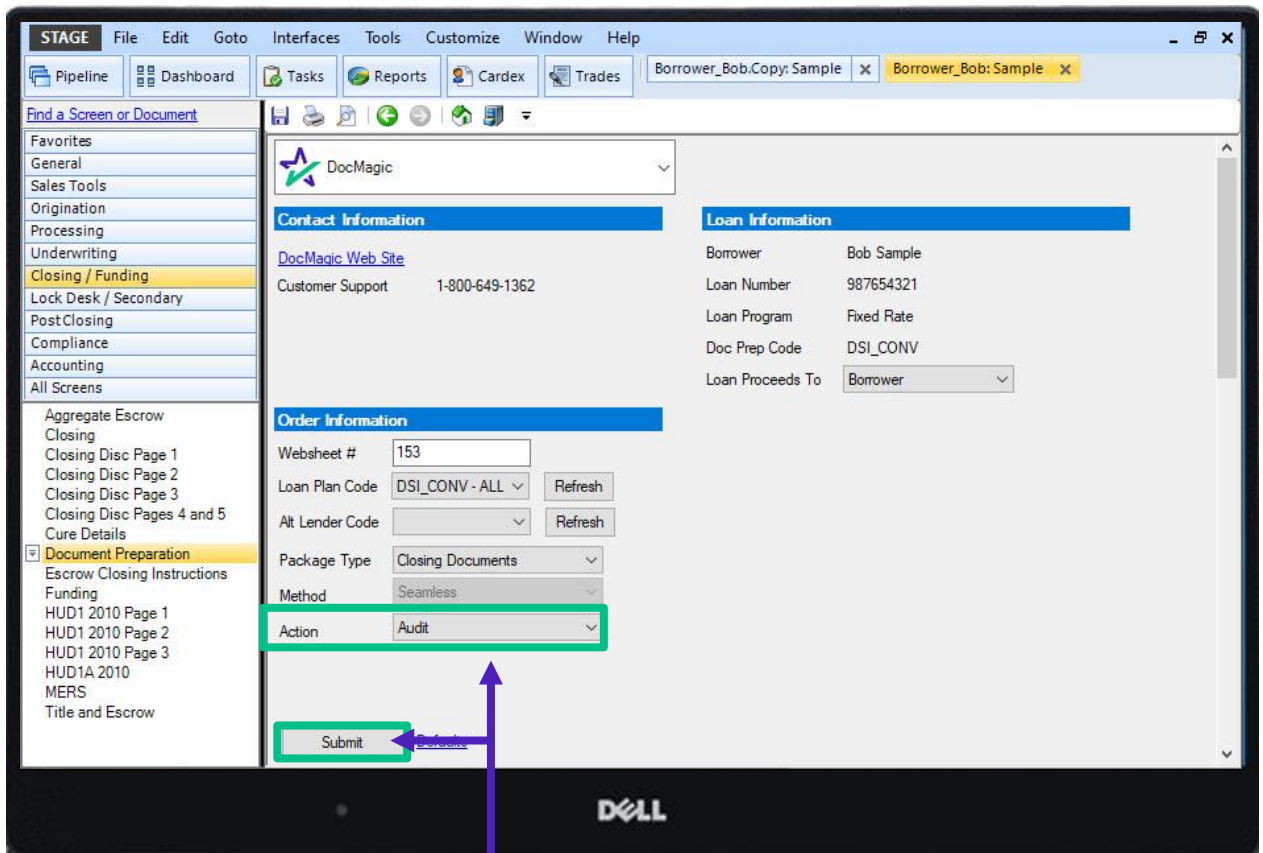Select DocMagic.

Choose your package type from this drop-down menu.

Select Audit under Action, then Submit.

A pop-up box will appear.
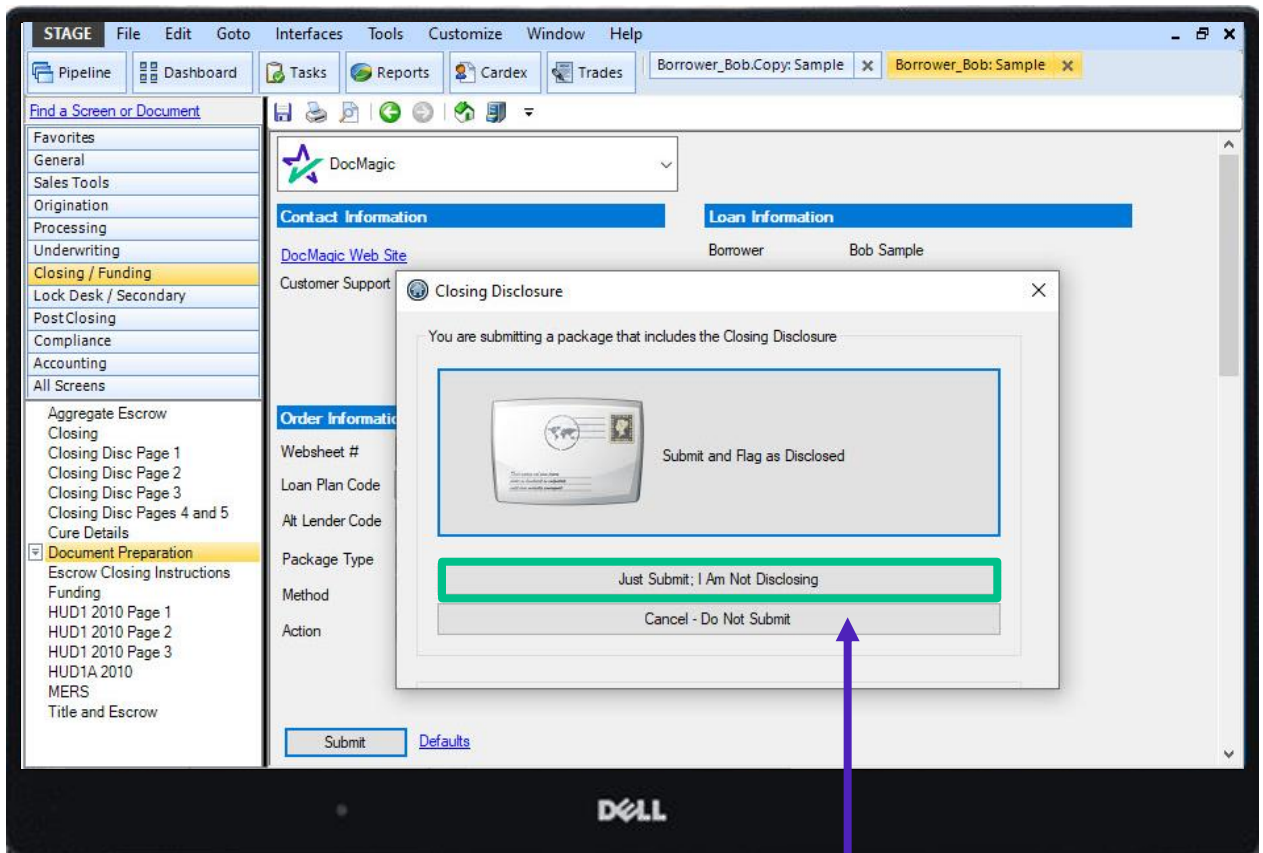


When running an Audit, select "Just Submit; I Am Not Disclosing" since the only action will be auditing the file.

# Generate Packages From Byte

Review the Audit messages in the Status Messages box.

| Favorites | |
|---|---|
| General | |
| Sales Tools | |
| Origination | |
| Processing | |
| Underwriting | |
| Closing / Funding | |
| Lock Desk / Secondary | |
| Post Closing | |
| 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

**Order Information**

| | |
|---|---|
| Websheet # | 108 |
| Loan Plan Code | DSI_CONV - ALL ⌄  Refresh |
| Alt Lender Code | ⌄  Refresh |
| Package Type | Initial Disclosures ⌄ |
| Method | Seamless ⌄ |
| Action | Audit ⌄ |

Submit   Defaults

**Status Messages (double-click to view long messages)**

| Date | Message |
|---|---|
| 1/17/24 4:46:43 PM | Warning: Flood Certification (FC): $7.50 exceeds baseline amount $0.00; Fee violates TILA/R... |
| 1/17/24 4:46:43 PM | Warning: Lender Coverage (LC): $515.00 exceeds baseline amount $0.00; Fee violates TILA... |
| 1/17/24 4:46:43 PM | Warning: Title - Settlement Agent Fee (CF): $945.00 exceeds baseline amount $0.00; Fee viol... |
| 1/17/24 4:46:43 PM | Warning: Processing Fee (PF): $296.00 exceeds baseline amount $0.00; Fee violates TILA/... |
| 1/17/24 4:46:43 PM | Warning: Credit Report Fee (CR): $45.50 exceeds baseline amount $0.00; Fee violates TILA/... |
| 1/17/24 4:46:43 PM | Warning: Appraisal Fee (AF): $350.00 exceeds baseline amount $0.00; Fee violates TILA/RE... |
| 1/17/24 4:46:43 PM | Warning: Charge 'Lender Coverage' (LC); Paid By 'B', Paid To 'O' does not have a Pay To Na... |
| 1/17/24 4:46:43 PM | Warning: Intent to Proceed may not be provided before an initial Loan Estimate. |
| 1/17/24 4:46:43 PM | Warning: Intent to service or transfer service indicator is blank. |

DELL

If there are any Fatal messages, the package cannot be processed until the errors are corrected.
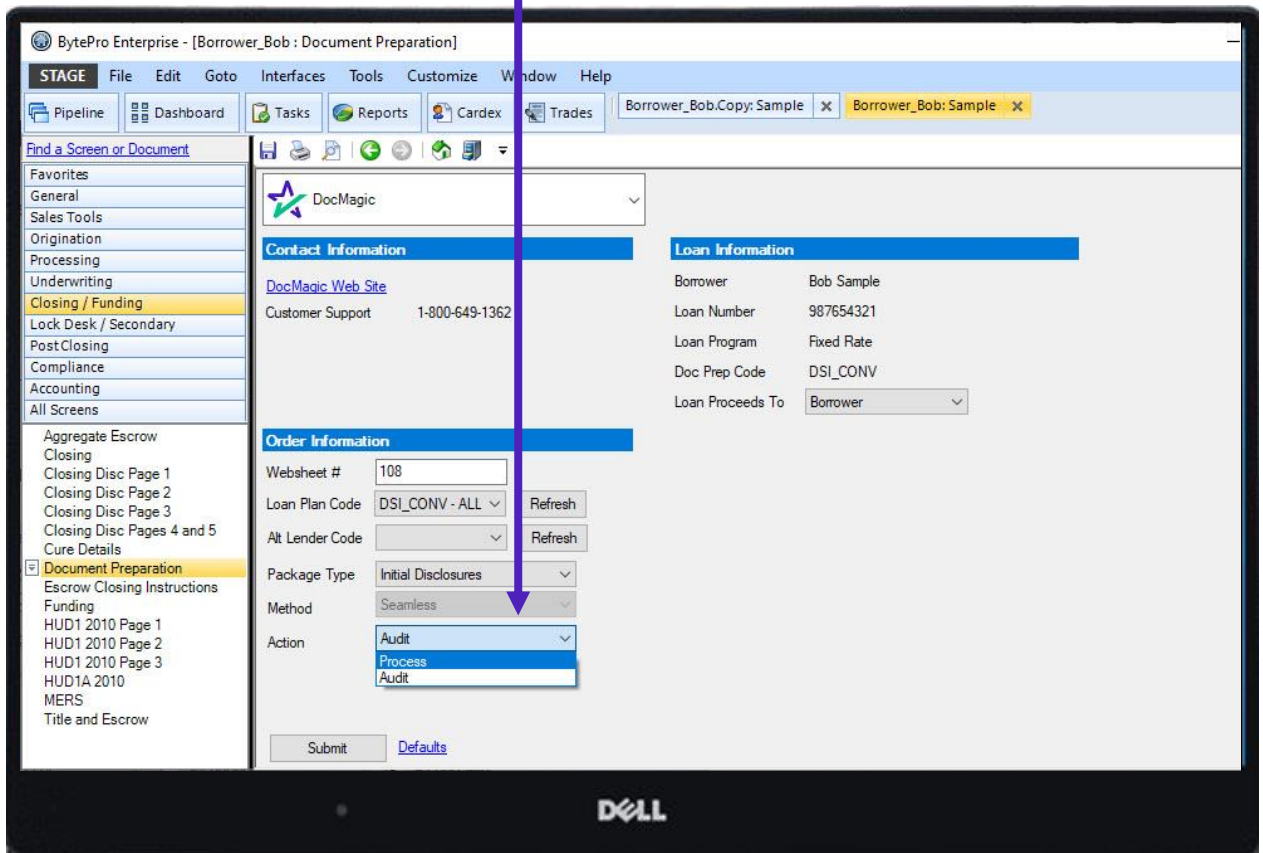
# Generate Packages From Byte

## Process

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

Submit

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

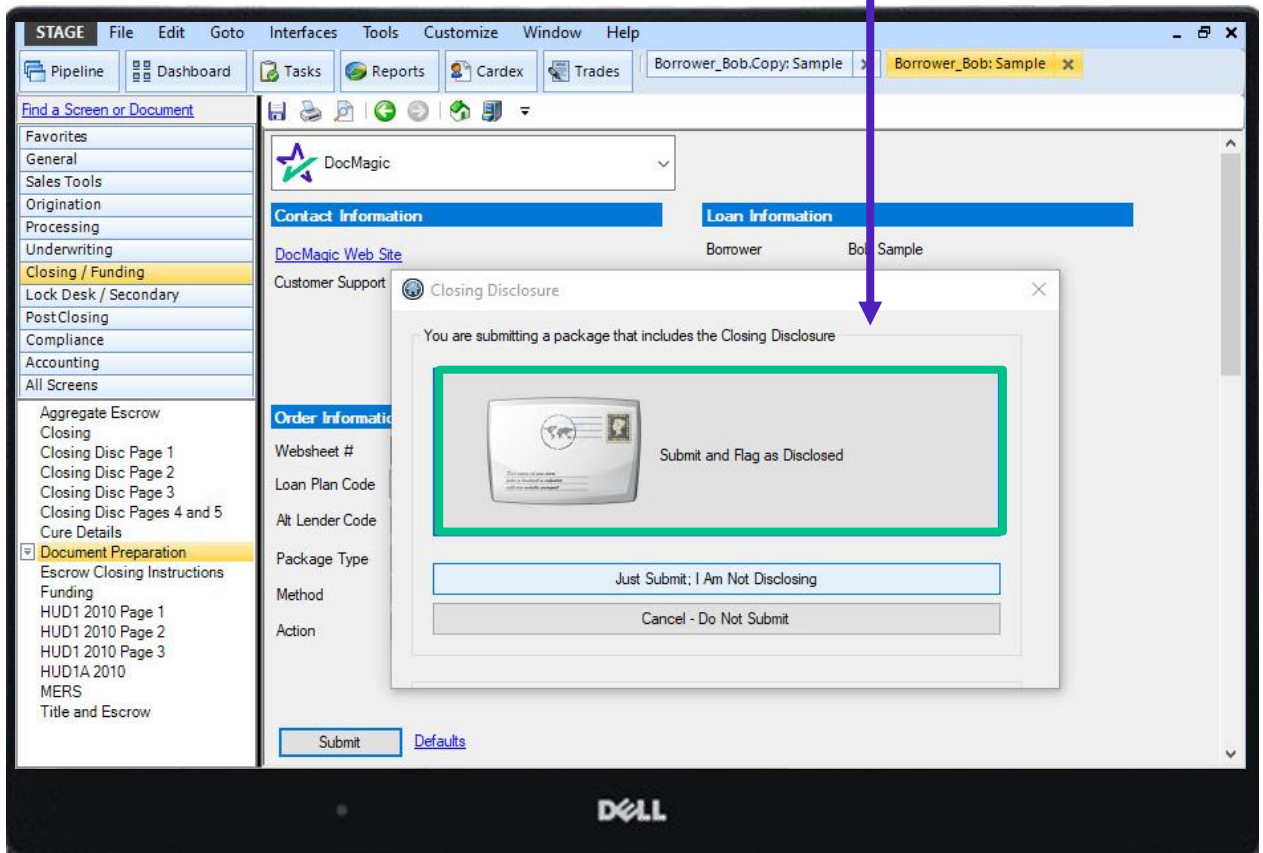Optional – In the Delivery Options section, select eSign or E-mail to send the package electronically.



Click Submit.

## Submit

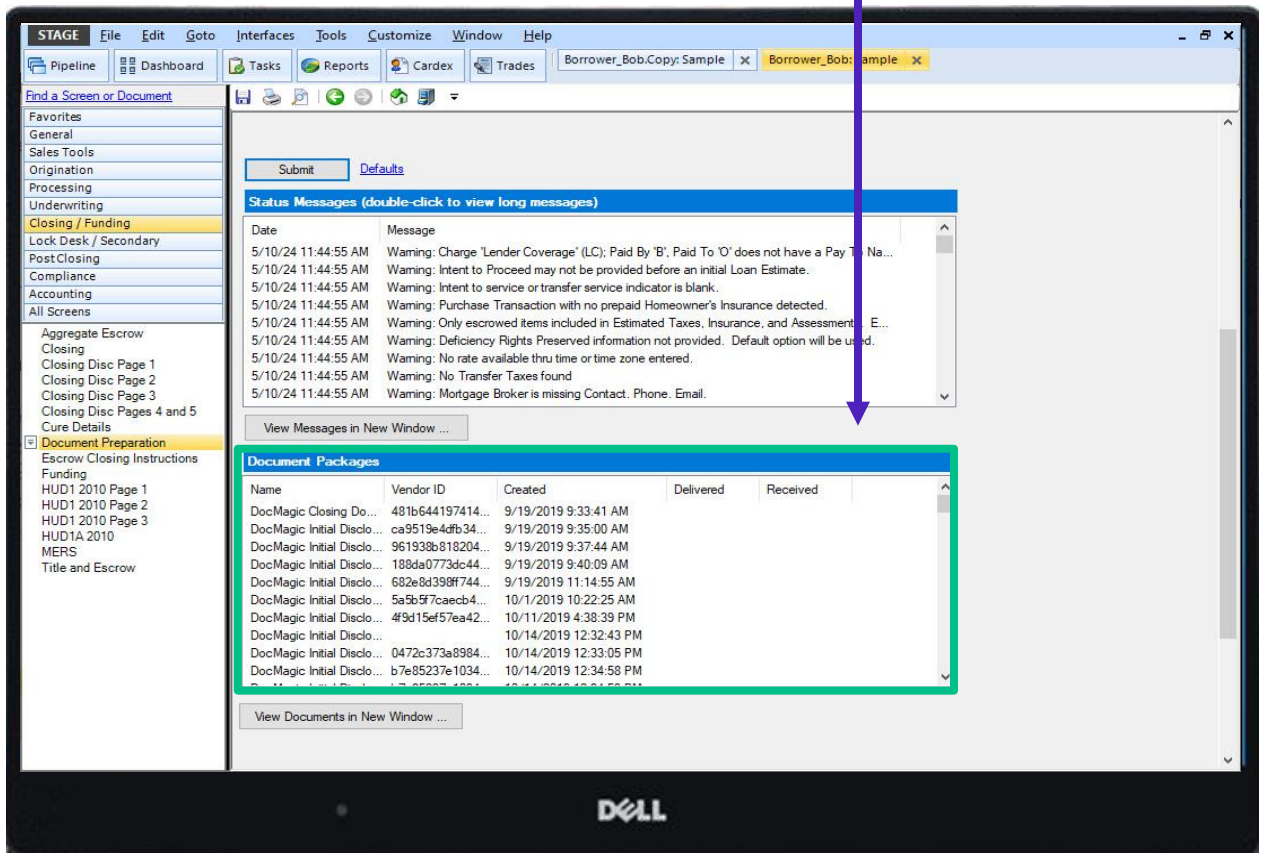> To process the package and Flag as Disclosed, select that option.

# Generate Packages From Byte

Processed documents will be visible in the Documents Window.



Double-click on a document to view.

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

To access the defaults screen, select Customize ➔ Defaults ➔ DocMagic.

⬤ Defaults

**Group**

All Defaults ∨

**Screen**

DocMagic
Docs on Demand
Document Preparation
ECOA and Other Disclosure
Emailing
Ernst Publishing
E-Sign - General
E-Sign - OneSpan Sign
Factual Data by CBC / Dat
Fannie Mae
Fannie Mae Export
Favorites
FHA
FHA Connection
FHA High Closing Cost Staf
FHA Informed Choice Disc.
First American Docutech C
First American FraudGuard
Freddie Mac
GFE - General
GFE - Notices
Ginnie Mae

**DocMagic**

Click here for global document preparation options

| Custom Fields | Server Type: | Production ∨ |
| Customer ID | | 100SALES |
| Username | | sales@docmagic.com |
| Password | | •••••••••••• |
| Submission Method: | | Always Seamless ∨ |

Tie DocMagic Websheet # 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. ☑

DELL

13

## User Credentials

Enter Customer ID, Username, and Password.

### Defaults

**Group**

All Defaults

**Screen**

DocMagic
Docs on Demand
Document Preparation
ECOA and Other Disclosure
Emailing
Ernst Publishing
E-Sign - General
E-Sign - OneSpan Sign
Factual Data by CBC / Dat
Fannie Mae
Fannie Mae Export
Favorites
FHA
FHA Connection
FHA High Closing Cost Stat
FHA Informed Choice Disc.
First American Docutech C
First American FraudGuard
Freddie Mac
GFE - General
GFE - Notices
Ginnie Mae
HMDA

**DocMagic**

Click here for global document preparation options

| Custom Fields | Server Type: | Production |
| --- | --- | --- |
| Customer ID | | 100SALES |
| Username | | sales@docmagic.com |
| Password | | •••••••••••• |

Submission Method:  Always Seamless

Tie DocMagic Websheet # 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.

DELL

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.
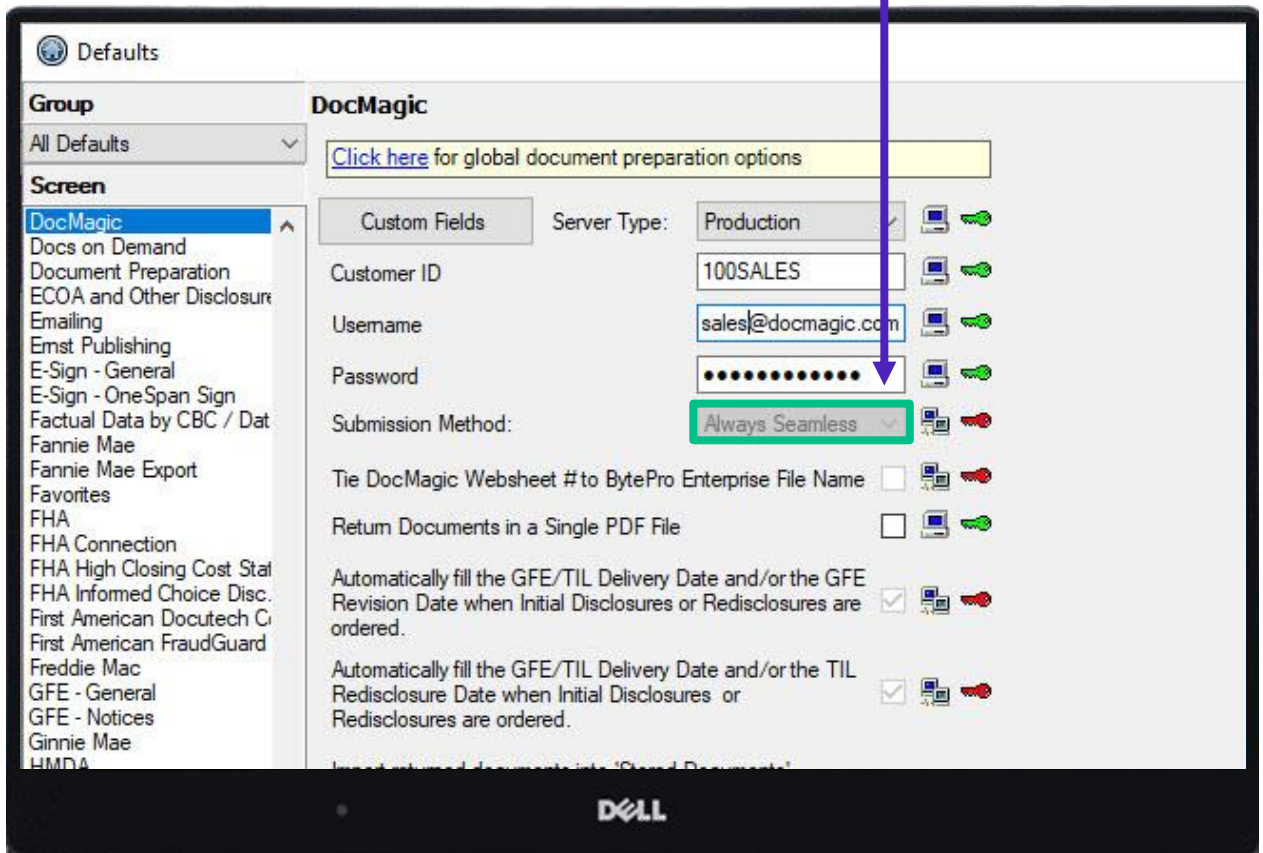
## Submission Method

There are three types of submission method settings:
1. Always Seamless
2. Always Browser
3. Allow User to Choose

---

**Defaults**

| Group | **DocMagic** |
|---|---|

All Defaults

Click here for global document preparation options

**Screen**

| DocMagic | Custom Fields | Server Type: | Production |
|---|---|---|---|
| Docs on Demand | | | |
| Document Preparation | Customer ID | | 100SALES |
| ECOA and Other Disclosure | | | |
| Emailing | Username | | sales@docmagic.com |
| Ernst Publishing | | | |
| E-Sign - General | Password | | •••••••••••• |
| E-Sign - OneSpan Sign | | | |
| Factual Data by CBC / Dat | Submission Method: | | Always Seamless |
| Fannie Mae | | | |
| Fannie Mae Export | Tie DocMagic Websheet # to BytePro Enterprise File Name | | |
| Favorites | | | |
| FHA | Return Documents in a Single PDF File | | |
| FHA Connection | | | |
| FHA High Closing Cost Stat | Automatically fill the GFE/TIL Delivery Date and/or the GFE | | |
| FHA Informed Choice Disc. | Revision Date when Initial Disclosures or Redisclosures are | | |
| First American Docutech Co | ordered. | | |
| First American FraudGuard | | | |
| Freddie Mac | Automatically fill the GFE/TIL Delivery Date and/or the TIL | | |
| GFE - General | Redisclosure Date when Initial Disclosures or | | |
| GFE - Notices | Redisclosures are ordered. | | |
| Ginnie Mae | | | |
| HMDA | | | |

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16

## Submission Method

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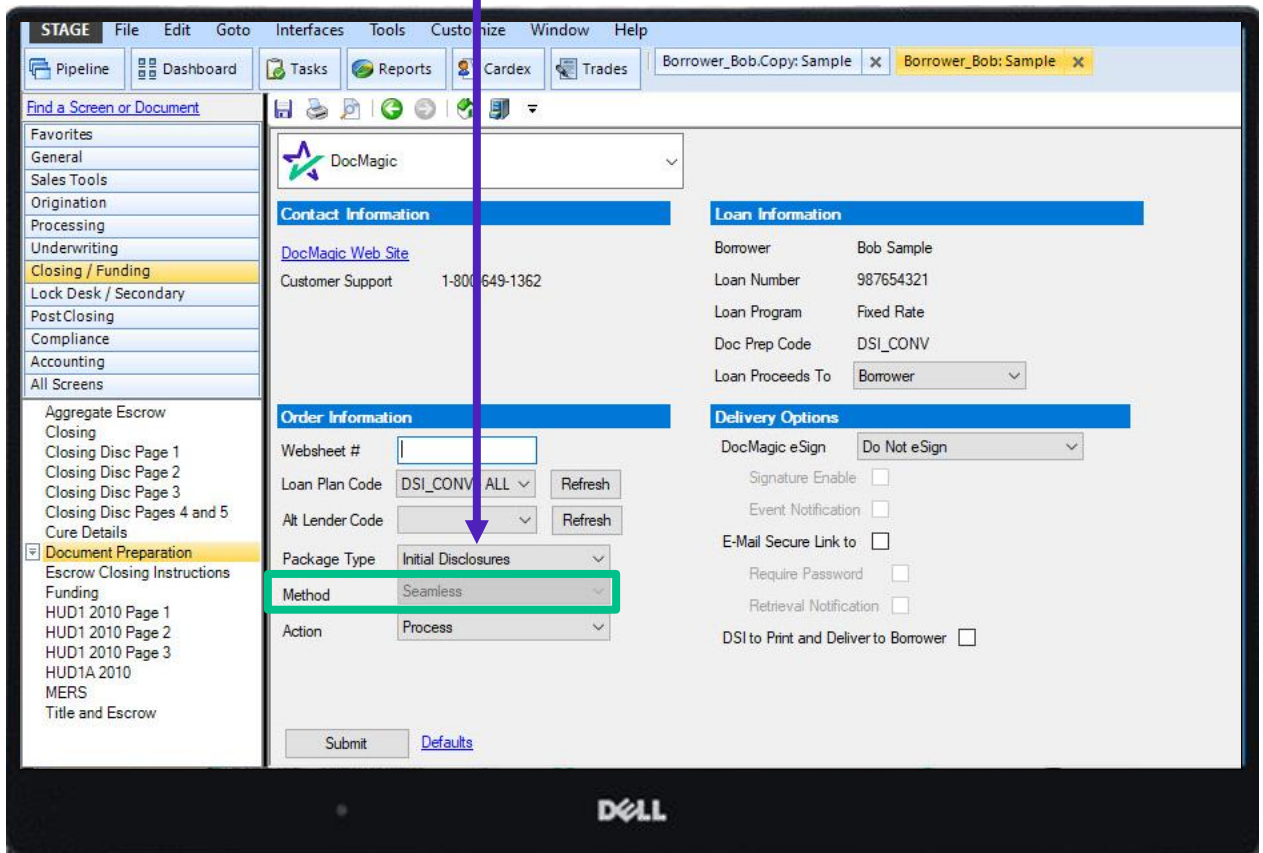


If you allow the user to choose a method, the option will be available to them at the loan level when ordering documents.

## Tie DocMagic Websheet Number

This setting allows the user to tie the DocMagic Websheet number to the BytePro Enterprise File Name so that they are always the same.
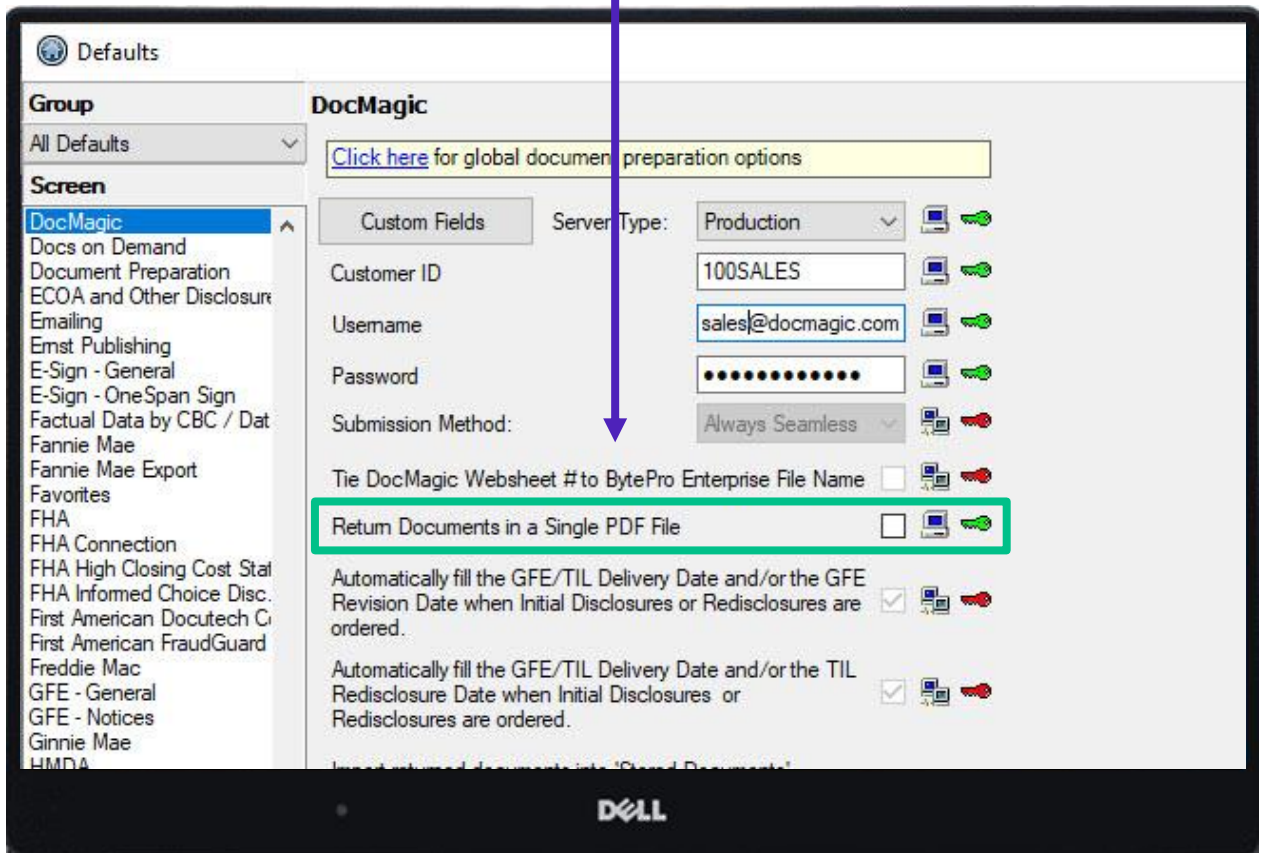
## Return Documents in a Single PDF

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.



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.
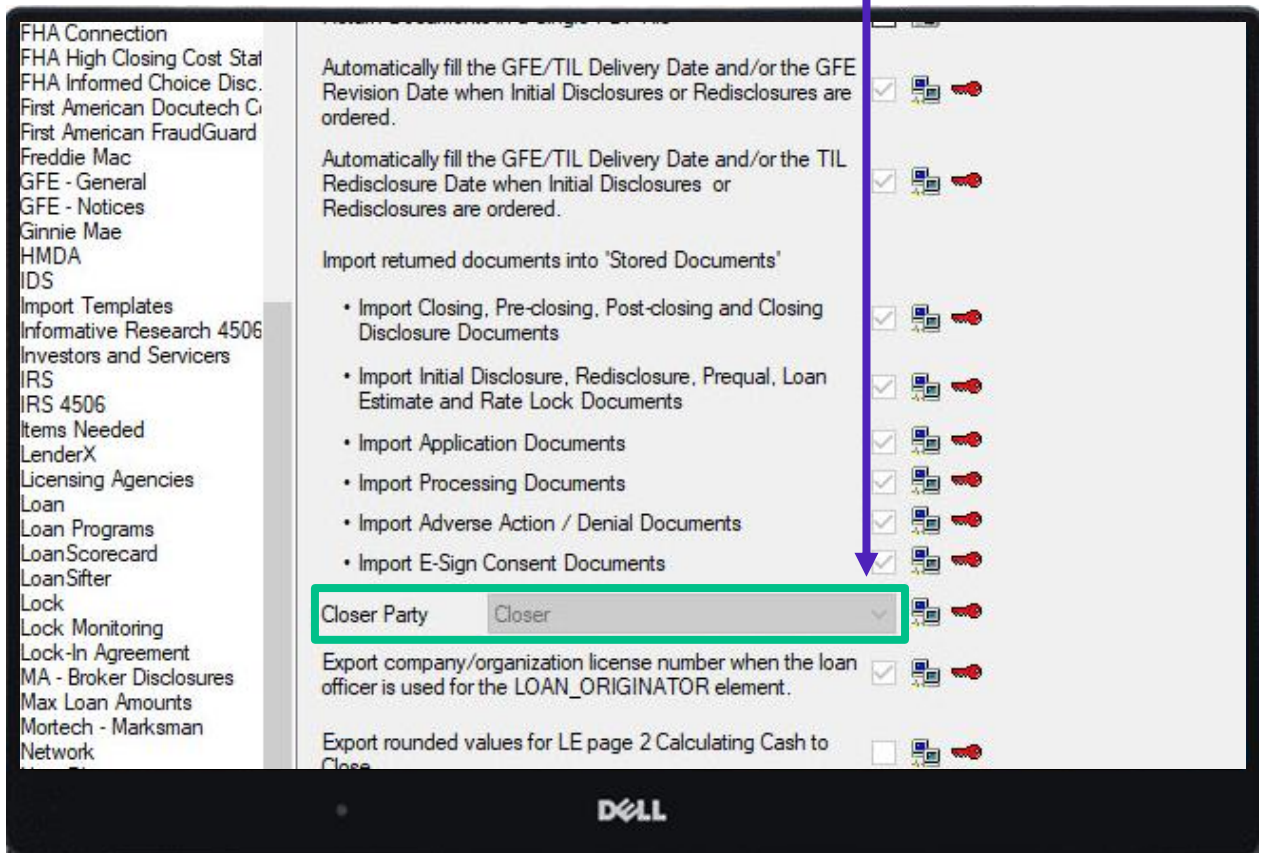
FHA Connection
FHA High Closing Cost Stat
FHA Informed Choice Disc.
First American Docutech C
First American FraudGuard
Freddie Mac
GFE - General
GFE - Notices
Ginnie Mae
HMDA
IDS
Import Templates
Informative Research 4506
Investors and Servicers
IRS
IRS 4506
Items Needed
LenderX
Licensing Agencies
Loan
Loan Programs
LoanScorecard
LoanSifter
Lock
Lock Monitoring
Lock-In Agreement
MA - Broker Disclosures
Max Loan Amounts
Mortech - Marksman
Network

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 Adverse Action / Denial Documents

- Import E-Sign Consent Documents

Closer Party        Closer

Export company/organization license number when the loan officer is used for the LOAN_ORIGINATOR element.

Export rounded values for LE page 2 Calculating Cash to Close

DELL

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.

FHA Connection
FHA High Closing Cost Stat
FHA Informed Choice Disc.
First American Docutech Cr
First American FraudGuard
Freddie Mac
GFE - General
GFE - Notices
Ginnie Mae
HMDA
IDS
Import Templates
Informative Research 4506
Investors and Servicers
IRS
IRS 4506
Items Needed
LenderX
Licensing Agencies
Loan
Loan Programs
LoanScorecard
LoanSifter
Lock
Lock Monitoring
Lock-In Agreement
MA - Broker Disclosures
Max Loan Amounts
Mortech - Marksman
Network

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 Adverse Action / Denial Documents

- Import E-Sign Consent Documents

Closer Party     Closer

Export company/organization license number when the loan officer is used for the LOAN_ORIGINATOR element.

Export rounded values for LE page 2 Calculating Cash to Close

**DELL**

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.

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.



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'.



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.

## Loan Program

You may select the Loan Plan Code under Order Information.

## Partner Custom Fields

Utilize this screen to match custom fields to fields in DocMagic.
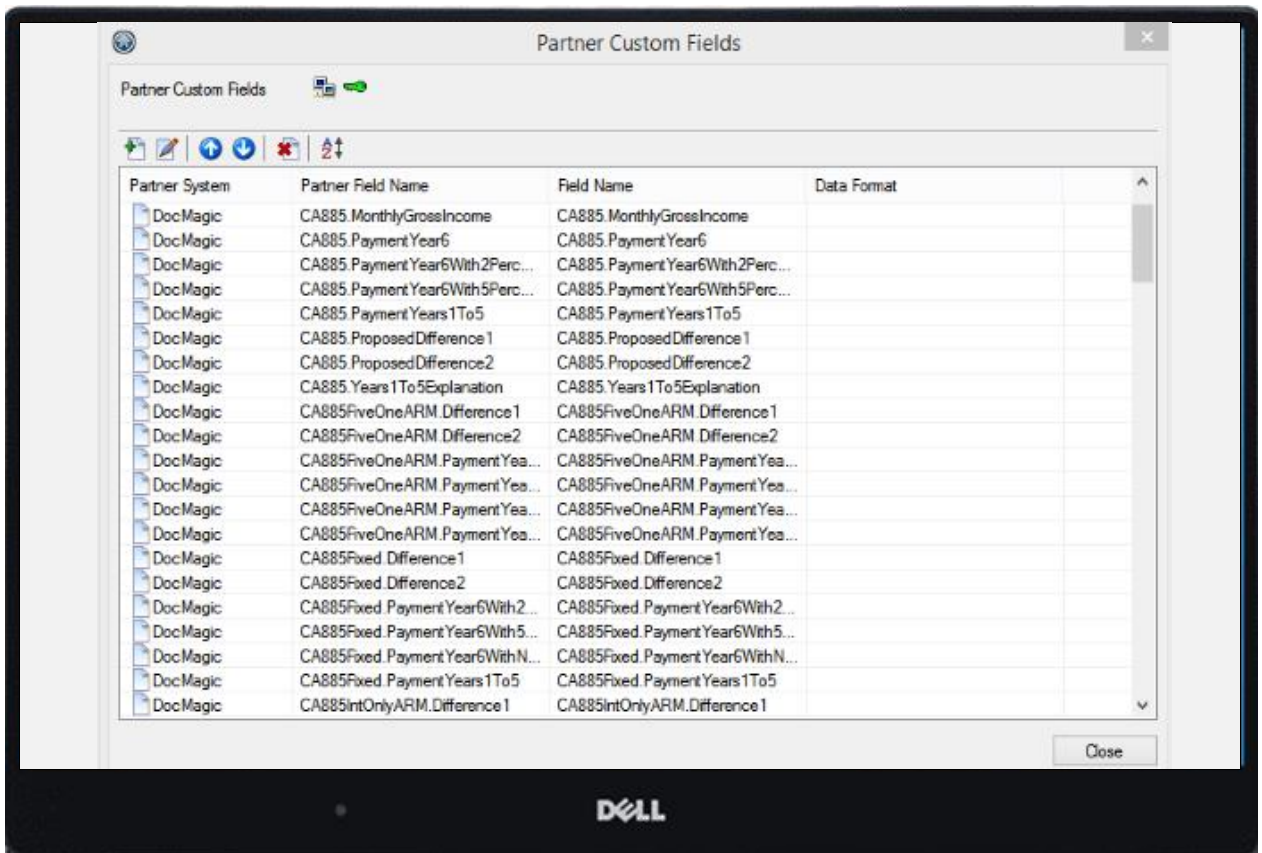
## Document Preparation Defaults

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

**Defaults**

**Group**

All Defaults ▼

**Screen**

DocMagic
Docs on Demand
Document Preparation
DocuTech ConformX
ECOA and Other Disclosure
Emailing
E-Sign
Fair Lending / Fair Credit
Fannie Mae
Fannie Mae Export
Favorites
FHA
FHA Connection
FHA High Closing Cost Stat
FHA Informed Choice Disc.
Freddie Mac
GFE - General
GFE - Notices

**Document Preparation**

Closing Instructions Option — PTF Conditions (not cleared and not inter ▼

Lender Contact - Retail Loans — Loan Officer ▼

Lender Contact - Brokered-Out Loans — ▼

Lender Contact - Wholesale Loans — Broker ▼

Lender Contact - Correspondent Loans — Loan Officer ▼

Lender Contact - Mini-Corr Loans — ▼

Transmit Alias Type: Credit Alias and AKA, Credit Alias Only, or AKA Only ☑

TRID Loans: Transmit Disclosed Fees on Loan Estimate ☑

DELL

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.