



## Byte Pro

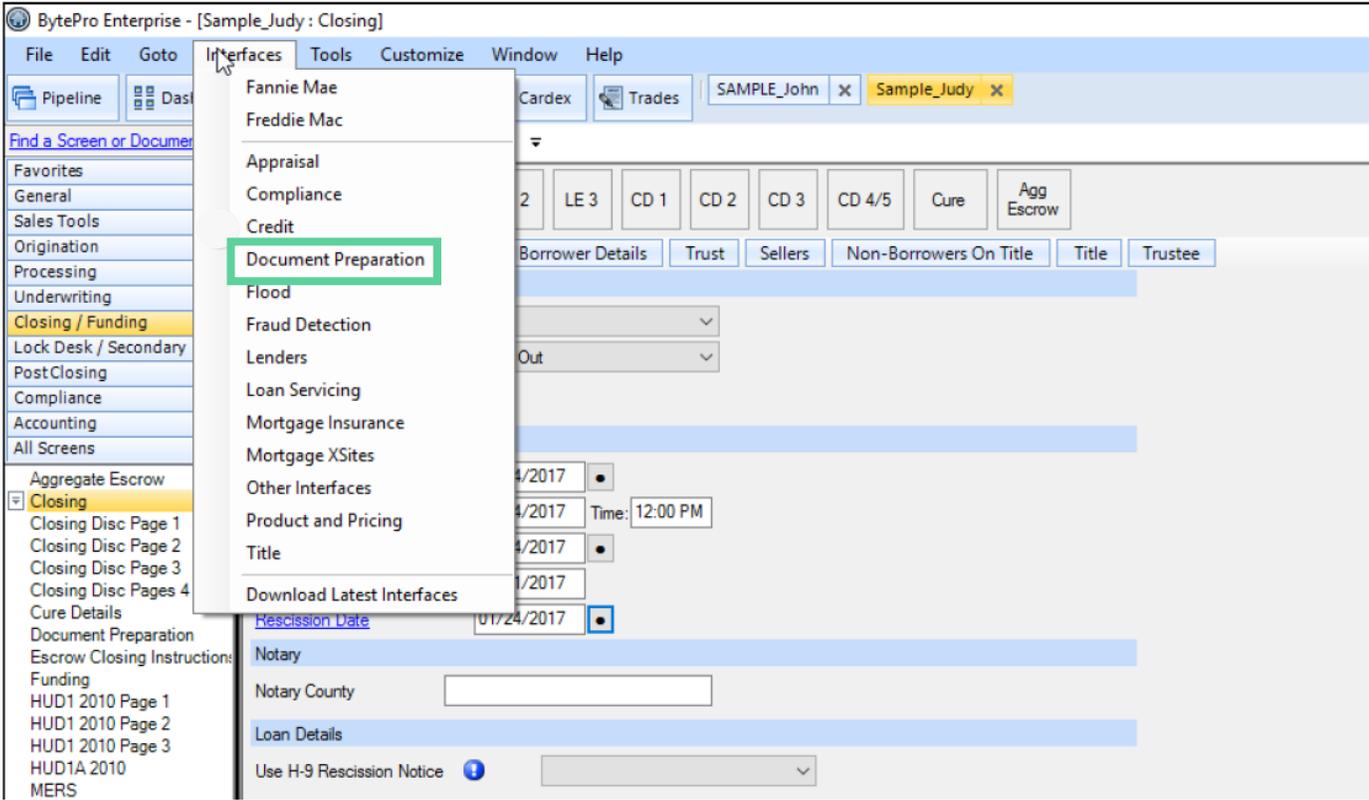
Disclosures and Closing  
Package Processing  
(including Total eClose)

# Generating Packages

The screenshot shows the BytePro Enter application window. The title bar reads "BytePro Enter - [Sample\_Judy : Closing]". The menu bar includes "File", "Edit", "Goto", "Interfaces", "Tools", "Customize", "Window", and "Help". The "Interfaces" menu is open, showing options like "Pipeline", "Dashboard", "Tasks", "Reports", "Cardex", and "Trades". The "Sample\_Judy" window is active. The left sidebar contains a "Find a Screen or Document" search bar and a list of screens, with "Closing / Funding" selected. The main workspace displays the "Closing Cost Detail Table" and various tabs for loan details. The "General" tab is active, showing fields for "Mortgage Originator" (Broker), "Origination Channel" (Brokered Out), and "Organization Type". The "Dates" section includes "Scheduled Closing Date" (02/14/2017), "Signing Date & Time" (02/14/2017, 12:00 PM), "Scheduled Funding Date" (01/24/2017), "First Payment Date" (03/01/2017), and "Rescission Date" (01/24/2017). The "Notary" section has a "Notary County" field. The "Loan Details" section includes "Use H-9 Rescission Notice". The "Subject Property" section has fields for "Street" (2206 Dahl Avenue), "House Number", "City, State, Zip" (Saint Paul, MN, 55119), "County" (Ramsey), "Units" (1), "Directional Prefix", "Street Name", and "Street Suffix".

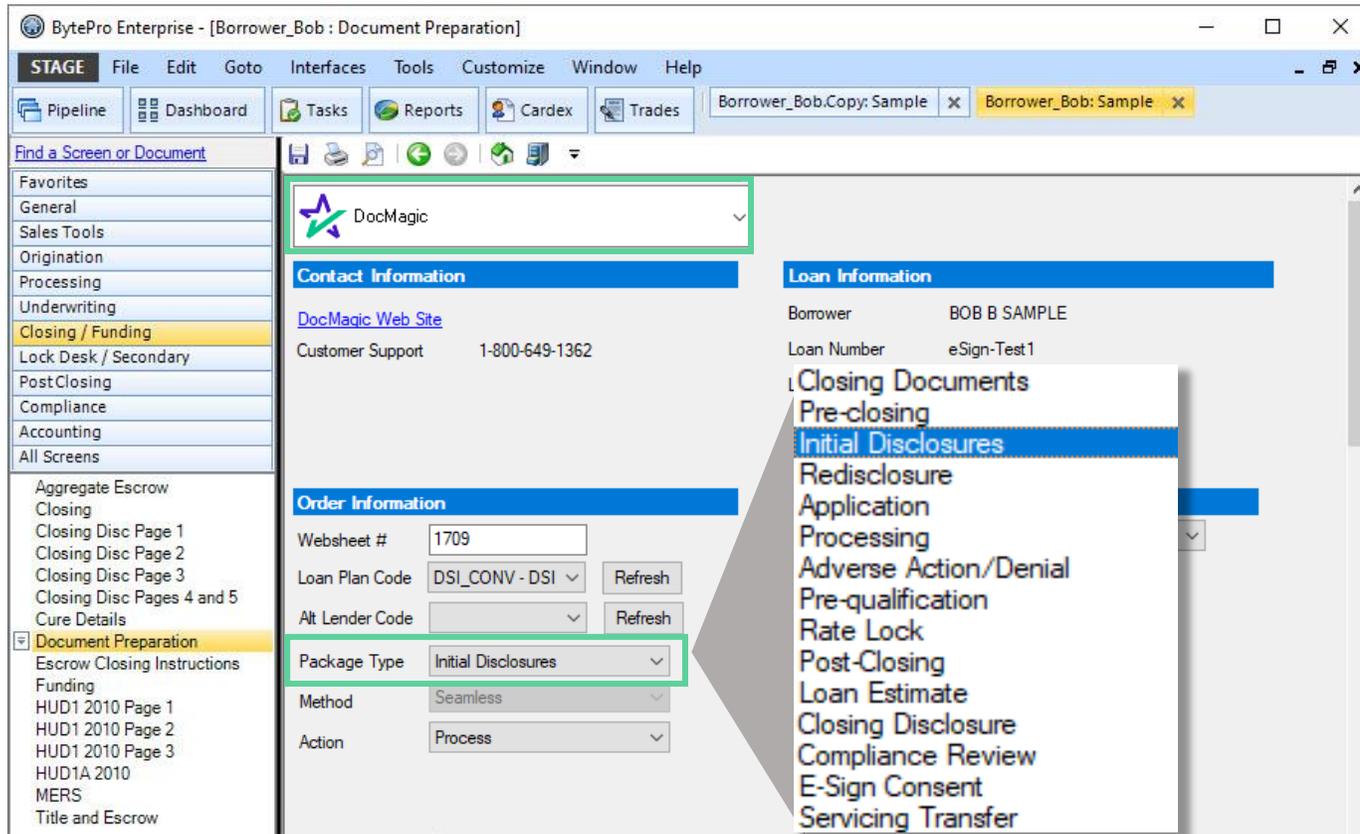
- To start, choose your loan package. Then click on the Interfaces option on the Byte toolbar

# Generating Packages



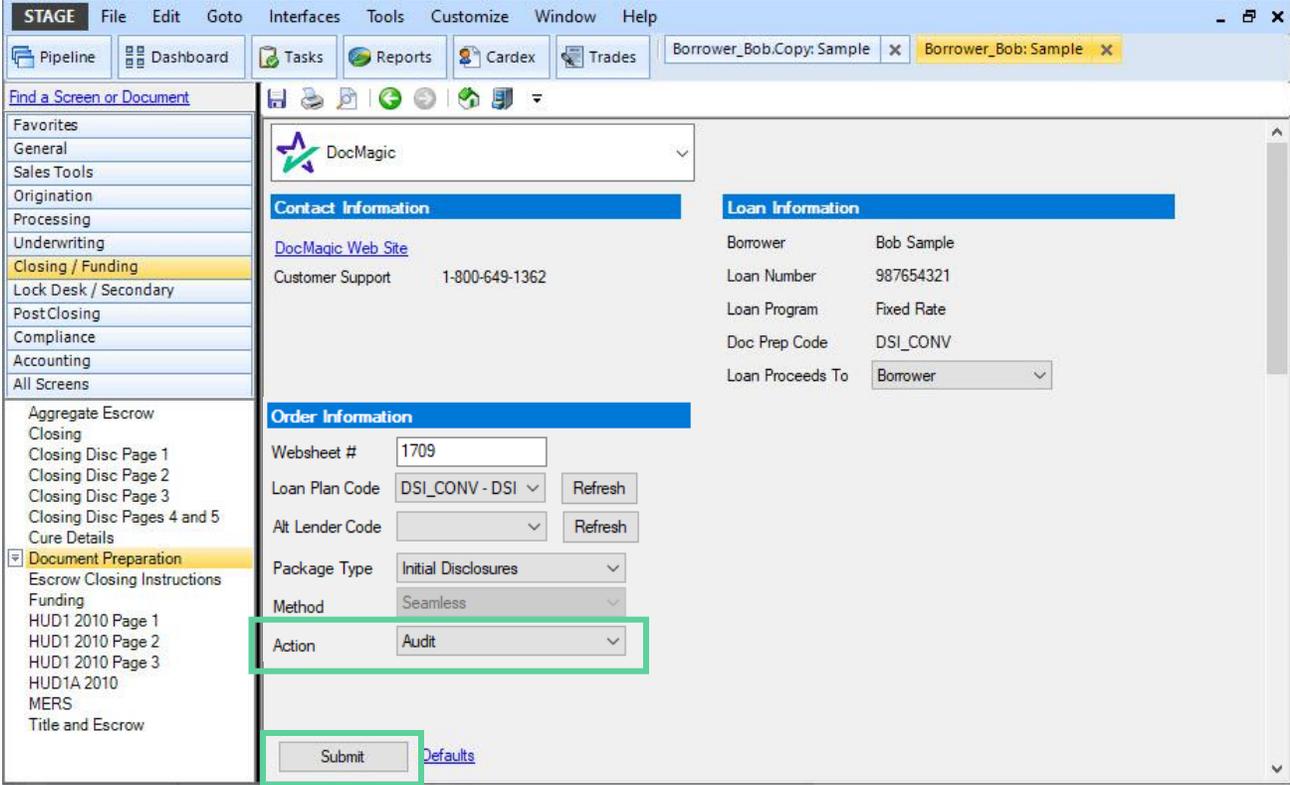
- Select Document Preparation

# Generating Packages



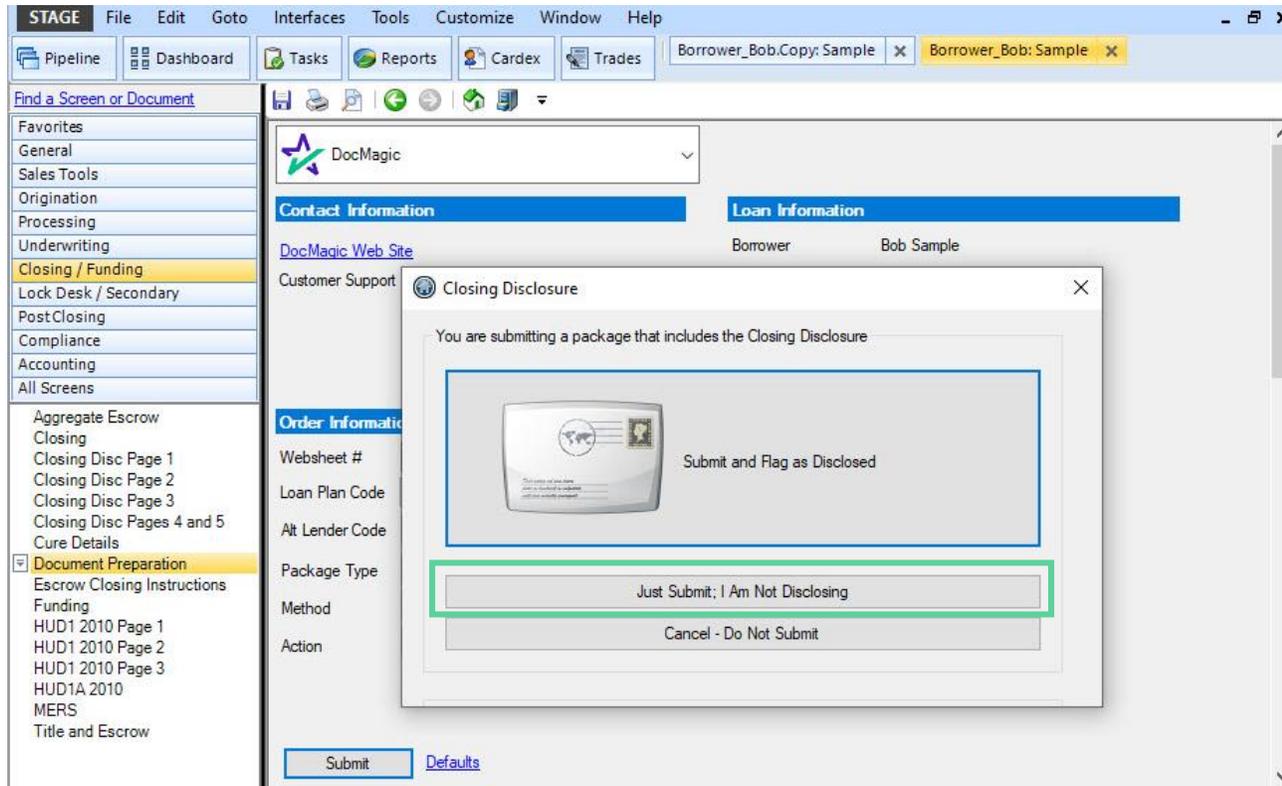
- Select DocMagic
- Choose your package type from the drop-down menu
- We'll start with Initial Disclosures

# Auditing



- Select Audit in the Action field, then click Submit

# Auditing



- 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.

# Auditing

The screenshot displays the STAGE software interface. The top menu bar includes 'STAGE', 'File', 'Edit', 'Goto', 'Interfaces', 'Tools', 'Customize', 'Window', and 'Help'. Below the menu is a toolbar with icons for Pipeline, Dashboard, Tasks, Reports, Cardex, and Trades. The main window has two tabs: 'Borrower\_Bob.Copy: Sample' and 'Borrower\_Bob: Sample'. On the left is a sidebar with a 'Find a Screen or Document' search bar and a list of screens, including 'Closing / Funding' which is currently selected. The main content area is divided into two sections: 'Order Information' and 'Status Messages'. The 'Order Information' section contains fields for 'Websheet #' (108), 'Loan Plan Code' (DSI\_CONV - ALL), 'Alt Lender Code', 'Package Type' (Initial Disclosures), 'Method' (Seamless), and 'Action' (Audit). Below these fields are 'Submit' and 'Defaults' buttons. The 'Status Messages' section is a table with columns for 'Date' and 'Message'. It contains several warning messages from 1/17/24 4:46:43 PM regarding fee violations and missing information.

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.

- Review the Audit messages in the Status Messages box
- If there are any **Fatal** messages, the package cannot be processed until the errors are corrected

# Processing

The screenshot shows the DocMagic software interface. The top menu bar includes 'STAGE', 'File', 'Edit', 'Goto', 'Interfaces', 'Tools', 'Customize', 'Window', and 'Help'. Below the menu bar are tabs for 'Pipeline', 'Dashboard', 'Tasks', 'Reports', 'Cardex', and 'Trades'. The main window displays 'Borrower\_Bob.Copy: Sample' and 'Borrower\_Bob: Sample'. The left sidebar contains a 'Find a Screen or Document' search bar and a list of categories: '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', and 'Title and Escrow'. The main content area is divided into sections: 'DocMagic' (with a dropdown), 'Contact Information' (DocMagic Web Site, Customer Support 1-800-649-1362), 'Loan Information' (Borrower: Bob Sample, Loan Number: 987654321, Loan Program: Fixed Rate, Doc Prep Code: DSI\_CONV, Loan Proceeds To: Borrower), and 'Order Information' (Websheet #: 108, Loan Plan Code: DSI\_CONV - ALL, Alt Lender Code, Package Type: Initial Disclosures, Method: Seamless). The 'Action' dropdown menu is open, showing 'Audit', 'Process', and 'Audit' options. The 'Process' option is highlighted. At the bottom, there are 'Submit' and 'Defaults' buttons.

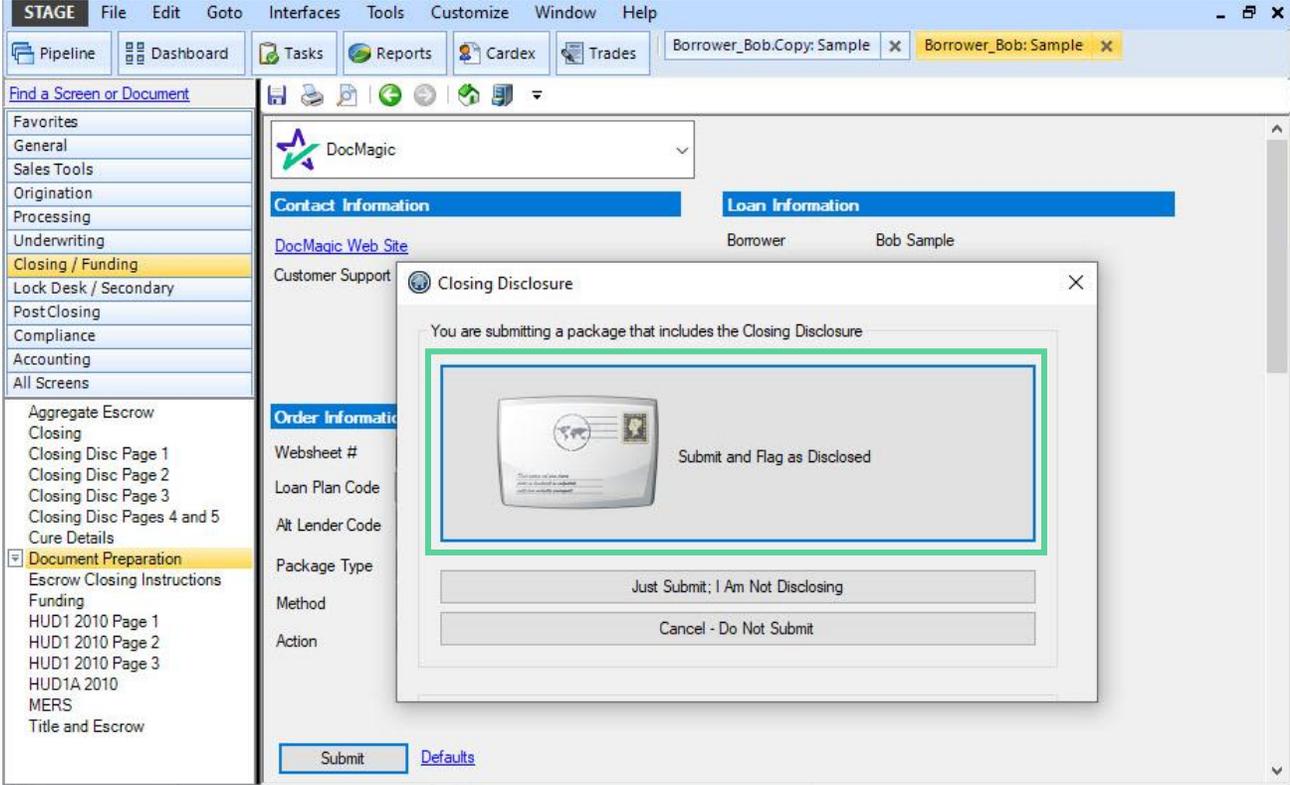
- Select Process in the Action drop-down when it's time to process the package

# Submit

The screenshot shows the DocMagic software interface. The menu bar includes STAGE, File, Edit, Goto, Interfaces, Tools, Customize, Window, and Help. The toolbar contains Pipeline, Dashboard, Tasks, Reports, Cardex, and Trades. The main window has two tabs: Borrower\_Bob.Copy: Sample and Borrower\_Bob: Sample. The left sidebar lists various screens, with 'Document Preparation' selected. The main content area is divided into several sections: 'Contact Information' (DocMagic logo, website, customer support), 'Loan Information' (Borrower: Bob Sample, Loan Number: 987654321, Loan Program: Fixed Rate, Doc Prep Code: DSI\_CONV, Loan Proceeds To: Borrower), 'Order Information' (Worksheet #, Loan Plan Code: DSI\_CONV - ALL, Alt Lender Code, Package Type: Initial Disclosures, Method: Seamless, Action: Process), and 'Delivery Options' (DocMagic eSign: Do Not eSign, Signature Enable, Event Notification, E-Mail Secure Link to, Require Password, Retrieval Notification, DSI to Print and Deliver to Borrower). A 'Submit' button is highlighted with a green box at the bottom left.

- Set the Plan Code, Alt Lender Code, Package Type and Method
- Select eSign or email to send the package electronically
- Then click Submit

# Auditing



- To process the package and Flag as disclosed, select that option

# Viewing

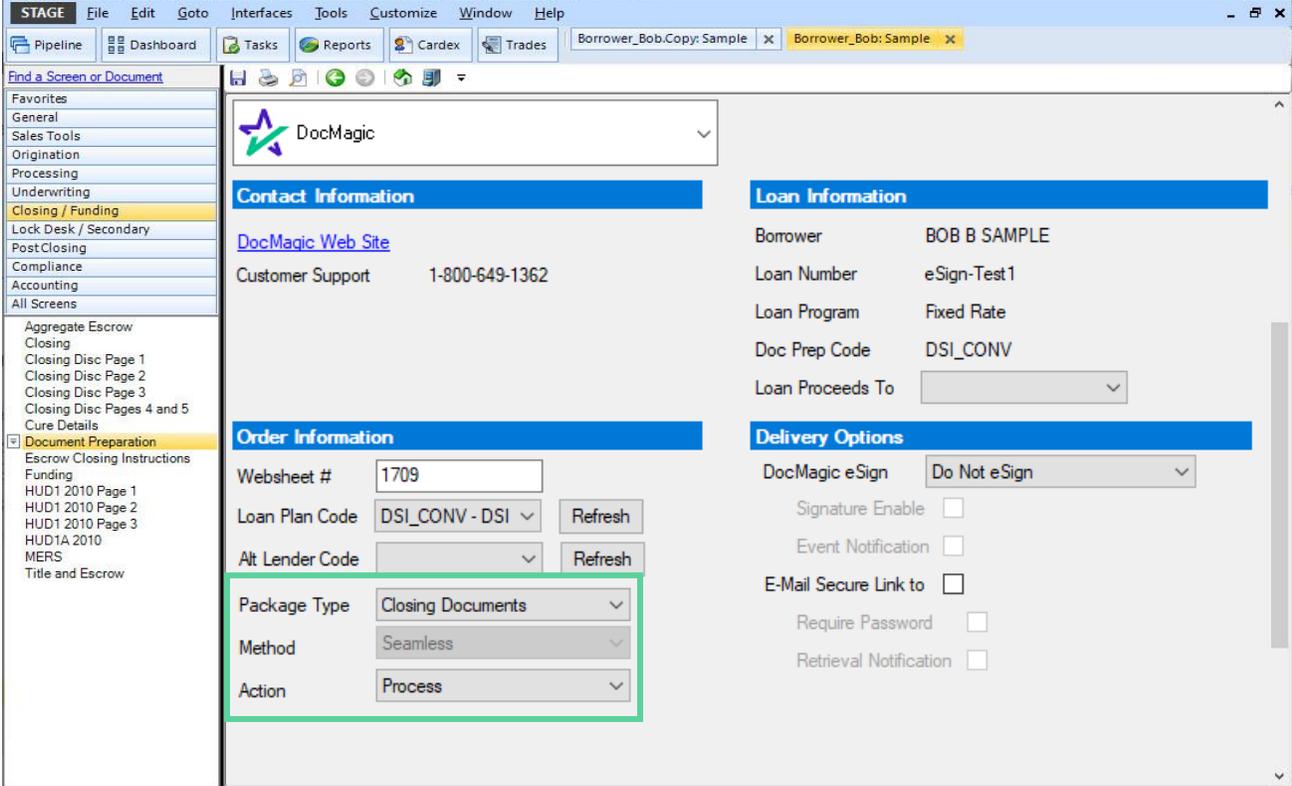
The screenshot displays the STAGE software interface. The top menu bar includes STAGE, File, Edit, Goto, Interfaces, Tools, Customize, Window, and Help. Below the menu is a toolbar with icons for Pipeline, Dashboard, Tasks, Reports, Cardex, and Trades. The main window has two tabs: 'Borrower\_Bob.Copy: Sample' and 'Borrower\_Bob: Sample'. On the left, a sidebar titled 'Find a Screen or Document' lists various categories like Favorites, General, Sales Tools, and Document Preparation. The main content area is divided into two sections. The top section, 'Status Messages (double-click to view long messages)', contains a table of messages with columns for Date and Message. The bottom section, 'Document Packages', contains a table with columns for Name, Vendor ID, Created, Delivered, and Received. A green box highlights the Document Packages table.

Date	Message
5/10/24 11:44:55 AM	Warning: Charge 'Lender Coverage' (LC); Paid By 'B'; Paid To 'O' does not have a Pay To Na...
5/10/24 11:44:55 AM	Warning: Intent to Proceed may not be provided before an initial Loan Estimate.
5/10/24 11:44:55 AM	Warning: Intent to service or transfer service indicator is blank.
5/10/24 11:44:55 AM	Warning: Purchase Transaction with no prepaid Homeowner's Insurance detected.
5/10/24 11:44:55 AM	Warning: Only escrowed items included in Estimated Taxes, Insurance, and Assessments. E...
5/10/24 11:44:55 AM	Warning: Deficiency Rights Preserved information not provided. Default option will be used.
5/10/24 11:44:55 AM	Warning: No rate available thru time or time zone entered.
5/10/24 11:44:55 AM	Warning: No Transfer Taxes found
5/10/24 11:44:55 AM	Warning: Mortgage Broker is missing Contact. Phone. Email.

Name	Vendor ID	Created	Delivered	Received
DocMagic Closing Do...	481b644197414...	9/19/2019 9:33:41 AM		
DocMagic Initial Discl...	ca9519e4dfb34...	9/19/2019 9:35:00 AM		
DocMagic Initial Discl...	961938b818204...	9/19/2019 9:37:44 AM		
DocMagic Initial Discl...	188da0773dc44...	9/19/2019 9:40:09 AM		
DocMagic Initial Discl...	682e8d398f744...	9/19/2019 11:14:55 AM		
DocMagic Initial Discl...	5a5b5f7caeb4...	10/1/2019 10:22:25 AM		
DocMagic Initial Discl...	#f9d15ef57ea42...	10/11/2019 4:38:39 PM		
DocMagic Initial Discl...		10/14/2019 12:32:43 PM		
DocMagic Initial Discl...	0472c373a8984...	10/14/2019 12:33:05 PM		
DocMagic Initial Discl...	b7e85237e1034...	10/14/2019 12:34:58 PM		

- Processed documents will be visible in the Documents Window
- Double-click on a document to view it

# Total eClose



- BytePro now supports Total eClose. Select Closing Documents for Package Type and Process for Action

# Submitting

The screenshot shows the STAGE software interface with the following sections:

- Contact Information:** DocMagic Web Site, Customer Support 1-800-649-1362
- Order Information:** Websheet # 1709, Loan Plan Code DSI\_CONV - DSI, Alt Lender Code, Package Type Closing Documents, Method Seamless, Action Process
- Loan Information:** Borrower BOB B SAMPLE, Loan Number eSign-Test1, Loan Program Fixed Rate, Doc Prep Code DSI\_CONV, Loan Proceeds To
- Delivery Options:** DocMagic eSign, Signature Enable , Event Notification , E-Mail Secure Link to , Require Password , Retrieval Notification

The **ENotary** checkbox is checked, and the **ENote** dropdown is set to **Yes**. A **Submit** button is highlighted with a green box.

- Selecting DocMagic eSign under Delivery Options will display several more options related to Total eClose
- Start by checking the Signature Enable box
- Check the eNotary box and select Yes for eNote
- Note: For Hybrid 2 – you would not select ENotary
- For Hybrid 3 – you would not select ENote
- Click Submit to confirm your request

# eSign Console

INFO@DOCMAGIC.COM | PHONE (800) 649-1362

f t in v e

DASHBOARD / LOG OUT

## DocMagic

SOLUTIONS SERVICES COMPLIANCE SUPPORT COMPANY

WELCOME STEVE! (#100SALES) TOUR THE DASHBOARD

### Launch Center

- eSign Console
- AutoPrep™
- DocMagic®
- DocMagicXL®
- SmartCLOSE®
- LoanMagic® Console
- eVault
- SmartREGISTRY™

### My Documents

- DOCUMENT FILES**  
Access and manage your loan document files
- FORMS MANAGER**  
Add and remove forms from your document packages
- STACKING ORDER**  
Modify the order of documents in your packages
- REPORT MANAGER**  
Generate reports: 1098, Closing, HMDA, LEF and more
- LOAN DEFAULTS**  
Manage charges, fees, premiums, impounds, and more
- SAMPLE DOCUMENT REVIEW**  
Review and approve your sample documents

### Account Settings

- USERS**  
Set up and manage user accounts and permissions
- PLAN MANAGER**  
Manage the loan programs for your account
- LENDER PROFILE**  
Manage your company and contact information

### Latest News

- URLA: Updates, Improvements and Deadlines
- Getting Started with eClose
- Closing a Loan Electronically

### Compliance Edge

Tools and resources to help you stay on top of compliance change as it happens.

### Help Center

Search our knowledge base for answers to your common questions.

- If eSign enabled, the file will appear in your [eSign Console](#), at the top of your list.