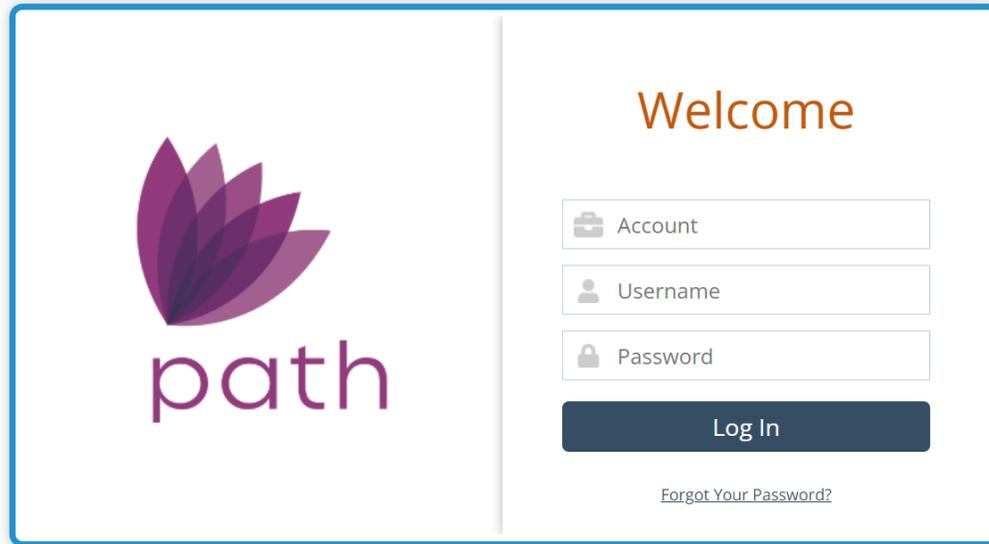




Calyx Path

Initial and Total eClose
Package Processing

Getting Started



- Start by opening and logging into Calyx Path in a web browser

**SERVICE PACK
NOW LIVE**

[Service Pack is NOW LIVE! Click here to see full Release Notes \(August 28 2023\)](#)

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File Selection



Loans Pipeline Desk

Desk Cabinet Role Desk Role Cabinet

Production (6) Lock (6) Compliance (6) Condition (0) All

<input type="checkbox"/>	Loan Number	Loan Servicer #	LO Name	OU Name	Borrower First Last Na	Subject Property Stree	Loan Status
<input type="checkbox"/>	8175550959	7356	Jessaca Johnson	DocMagic			Application Taken
<input type="checkbox"/>	8175550760	6720	Jessaca Johnson	DocMagic			Application Taken
<input type="checkbox"/>	8175550703	6362	Jessaca Johnson	DocMagic			Application Taken
<input type="checkbox"/>	8175550996	4503	Jessaca Johnson	DocMagic	Robert Borrower	123 Property St	Application Taken
<input type="checkbox"/>	64092	2911	Jessaca Johnson	DocMagic	Bob B Sample	123 property st	Lock Confirmed
<input type="checkbox"/>	64089	2908	Jessaca Johnson	DocMagic	John Homeowner	110 Hagerman Court	Application Taken

1 100

Delete New Loan Import Assign Unassign Archive Change Loan Originator Copy to Sandbox

- Select your file

Production | Interfaces | Initial / Closing Docs

The screenshot shows the path calyx web application interface. At the top, there is a navigation bar with the path calyx logo on the left. The main navigation area includes tabs for 'Loans', '8175550196—Robert Borrower, JR', 'Production', and 'Send/Status'. The 'Production' tab is highlighted with a green box. Below the navigation bar, there are several sections: 'Production Validation' (All validations are satisfied), 'Production Send/Assign History' (a table with columns for Action Date/Time, By, Role, and Assign To), and 'Production Status History' (a table with columns for Action Date/Time, By, Role, and Notes). A dropdown menu is open under the 'Production' tab, listing options: Lock, Compliance, Conditions, Documents, Interfaces, and Messages. The 'Interfaces' option is expanded, showing a sub-menu with options: Summary, Credit, AUS, Initial/Closing Docs (highlighted with a green box), Appraisal, Flood, and Mortgage Insurance. At the bottom of the interface, there are three buttons: 'Inactive', 'Send To', and 'Set Status'.

- Select Production from the top

Initial | Closing Docs

path calyx

Loans 8175550196--Bob Borrower Interfaces Initial/Closing Docs

Summary Credit AUS Initial/Closing Docs Appraisal Flood Mortgage Insurance

Order

Document Provider: DocMagic Direct
Account Number: 100JJ
Username: Jessaca@docmagic.com
Password: *****

Request Type: Closing Package
Package Type: Closing Documents
Supplement Language: [Empty]

Task: Process
Official Documents:
Return Document Packaging: Individual Documents
Document Plan Code: DSL_CONV
Loan Program: ALL FIXED LOANS
Service Type: Esign
Enable Electronic Signatures:
Promissory Note: Electronic (eNote)
Notary Documents: Electronic (eNotary)
Notary Service Provider: Docmagic
Submit MERS Registration:
Alternate Lender Code: [Empty]
Business Use:

Save Custom 1 Custom 2 Custom 3 Order

- You are now on the Initial | Closing Docs screen

Credentials

path calyx

Loans 8175550196—Bob Borrower Interfaces Initial/Closing Docs

Summary Credit AUS Initial/Closing Docs Appraisal Flood Mortgage Insurance

Order

Document Provider: DocMagic Direct

Account Number: 100JJ

Username: jessaca@docmagic.com

Password: *****

Request Type: Closing Package

Package Type: Closing Documents

Supplement Language: [Empty]

Task: Process

Official Documents:

Return Document Packaging: Individual Documents

Document Plan Code: DSI_CONV

Loan Program: ALL FIXED LOANS

Service Type: Esign

Enable Electronic Signatures:

Promissory Note: Electronic (eNote)

Notary Documents: Electronic (eNotary)

Notary Service Provider: Docmagic

Submit MERS Registration:

Alternate Lender Code: [Empty]

Business Use:

Save Custom 1 Custom 2 Custom 3 Order

- Select DocMagic Direct as your document provider
- Enter in your account number and your credentials (username/password)

Request Type

The screenshot shows the 'path calyx' web application interface. The top navigation bar includes 'Loans', '8175550196—Bob Borrower', 'Interfaces', and 'Initial/Closing Docs'. Below this, a secondary navigation bar lists 'Summary', 'Credit', 'AUS', 'Initial/Closing Docs', 'Appraisal', 'Flood', and 'Mortgage Insurance'. The main content area is titled 'Order' and contains several input fields: 'Document Provider' (DocMagic Direct), 'Account Number' (100JJ), 'Username' (jessaca@docmagic.com), and 'Password'. A 'Request Type' dropdown menu is open, showing three options: 'Closing Package', 'Initial Disclosures', and 'Closing Package'. The 'Closing Package' option at the bottom is highlighted in blue. To the right of the dropdown, there are various configuration options: 'Task' (Process), 'Official Documents' (checked), 'Return Document Packaging' (Individual Documents), 'Document Plan Code' (DSL_CONV), 'Loan Program' (ALL FIXED LOANS), 'Service Type' (Esign), 'Enable Electronic Signatures' (checked), 'Promissory Note' (Electronic (eNote)), 'Notary Documents' (Electronic (eNotary)), 'Notary Service Provider' (Docmagic), 'Submit MERS Registration' (unchecked), 'Alternate Lender Code' (empty), and 'Business Use' (unchecked). At the bottom of the form, there are buttons for 'Save', 'Custom 1', 'Custom 2', 'Custom 3', and 'Order'.

- Select Initial Disclosure or Closing Package from Request Type

Package Type

The screenshot shows the 'path calyx' web application interface. At the top, there is a navigation bar with tabs for 'Loans', '817550196—Bob Borrower', 'Interfaces', and 'Initial/Closing Docs'. Below this is a secondary navigation bar with tabs for 'Summary', 'Credit', 'AUS', 'Initial/Closing Docs', 'Appraisal', 'Flood', and 'Mortgage Insurance'. The main content area is titled 'Order' and contains several form fields:

- Document Provider: DocMagic Direct (dropdown)
- Account Number: 100JJ (text input)
- Username: Jessaca@docmagic.com (text input)
- Password: (password input)
- Request Type: Initial Disclosures (dropdown menu is open, showing options: Initial Disclosures, Loan Estimate, Application, Adverse Action/Denial, Point of Sale, ReDisclosure, Underwriting, Prequalification, Processing, Rate Lock)
- Package Type: (dropdown menu)
- Supplement Language: (text input)
- Task: Process (dropdown)
- Official Documents:
- Return Document Packaging: Individual Documents (dropdown)
- Document Plan Code: DSI_CONV (text input)
- Loan Program: ALL FIXED LOANS (dropdown)
- Service Type: Esign (dropdown)
- Enable Electronic Signatures:
- Promissory Note: Electronic (eNote) (dropdown)
- Notary Documents: Electronic (eNotary) (dropdown)
- Notary Service Provider: Docmagic (dropdown)
- Submit MERS Registration:
- Alternate Lender Code: (text input)
- Business Use:

At the bottom of the form, there are buttons for 'Save', 'Custom 1', 'Custom 2', 'Custom 3', and 'Order'.

- After choosing Request Type, select a Package Type
- Your options for Package Type are determined by what Request Type you select

Closing Package

The screenshot displays the 'path calyx' web application interface. At the top, there is a navigation bar with 'Loans' and a user profile '8175550196—Bob Borrower'. Below this is a secondary navigation bar with tabs for 'Summary', 'Credit', 'AUS', 'Initial/Closing Docs', 'Appraisal', 'Flood', and 'Mortgage Insurance'. The 'Initial/Closing Docs' tab is active. The main content area is titled 'Order' and contains several form fields:

- Document Provider: DocMagic Direct
- Account Number: 100JJ
- Username: jessaca@docmagic.com
- Password: [Redacted]
- Request Type: Closing Package (highlighted with a green box)
- Package Type: Closing Documents (highlighted with a red box)
- Supplement Language: [Empty]
- Task: Process
- Official Documents:
- Return Document Packaging: Individual Documents
- Document Plan Code: DSI_CONV
- Loan Program: ALL FIXED LOANS
- Service Type: Esign
- Enable Electronic Signatures:
- Promissory Note: Electronic (eNote)
- Notary Documents: Electronic (eNotary)
- Notary Service Provider: Docmagic
- Submit MERS Registration:
- Alternate Lender Code: [Empty]
- Business Use:

At the bottom of the form, there are buttons for 'Save', 'Custom 1', 'Custom 2', 'Custom 3', and 'Order'.

- If you select Closing Package, you'll get a list of Package Types that correspond

Supplemental Language Option

The screenshot displays the Path Calyx web application interface. At the top, the logo for 'path calyx' is visible. Below it, a navigation bar includes 'Loans', '8175550196—Bob Borrower', 'Interfaces', and 'Initial/Closing Docs'. A secondary navigation bar lists 'Summary', 'Credit', 'AUS', 'Initial/Closing Docs', 'Appraisal', 'Flood', and 'Mortgage Insurance'. The main content area is titled 'Order' and contains several form fields:

- Document Provider: DocMagic Direct
- Account Number: 100JJ
- Username: jessaca@docmagic.com
- Password: [Redacted]
- Request Type: Closing Package
- Package Type: Closing Documents
- Supplemental Language: [Open dropdown menu showing options: Chinese, Korean, Spanish, Tagalog, Vietnamese]
- Task: Process
- Official Documents: [Checked]
- Return Document Packaging: Individual Documents
- Document Plan Code: DSI_CONV
- Loan Program: ALL FIXED LOANS
- Service Type: Esign
- Enable Electronic Signatures: [Checked]
- Promissory Note: Electronic (eNote)
- Notary Documents: Electronic (eNotary)
- Notary Service Provider: Docmagic
- Submit MERS Registration: [Unchecked]
- Alternate Lender Code: [Empty]
- Business Use: [Unchecked]

At the bottom of the form, there are buttons for 'Save', 'Custom 1', 'Custom 2', 'Custom 3', and 'Order'.

- Path does include a Supplemental Language option, where you can get the documents back in a different language
- NOTE: This is not set up by default. Please check with Customer Service before enabling this

Task

The screenshot shows the 'path calyx' web application interface. The top navigation bar includes 'Loans', '8175550196—Bob Borrower', 'Interfaces', and 'Initial/Closing Docs'. Below this is a secondary navigation bar with tabs for 'Summary', 'Credit', 'AUS', 'Initial/Closing Docs', 'Appraisal', 'Flood', and 'Mortgage Insurance'. The main content area is titled 'Order' and contains several form fields:

- Document Provider: DocMagic Direct (dropdown)
- Account Number: 100JJ (text input)
- Username: jessaca@docmagic.com (text input)
- Password: (password input)
- Request Type: Closing Package (dropdown)
- Package Type: Closing Documents (dropdown)
- Supplement Language: (text input)
- Task: (dropdown menu, highlighted with a green box, showing options: Process, Audit, Process, Save)
- Official Documents: (text input)
- Return Document Packaging: (text input)
- Document Plan Code: DSI_CONV (text input)
- Loan Program: ALL FIXED LOANS (text input)
- Service Type: Esign (dropdown)
- Enable Electronic Signatures:
- Promissory Note: Electronic (eNote) (dropdown)
- Notary Documents: Electronic (eNotary) (dropdown)
- Notary Service Provider: Docmagic (dropdown)
- Submit MERS Registration:
- Alternate Lender Code: (text input)
- Business Use:

At the bottom of the form, there are buttons for 'Save', 'Custom 1', 'Custom 2', 'Custom 3', and 'Order'.

- Choose Audit if you want to check the document package for any errors or Process to process the set of documents

Official Documents

The screenshot shows the 'path calyx' web application interface. At the top, there is a navigation bar with 'Loans' and '8175550196—Bob Borrower'. Below this is a sub-navigation bar with 'Interfaces' and 'Initial/Closing Docs'. A secondary bar contains tabs for 'Summary', 'Credit', 'AUS', 'Initial/Closing Docs', 'Appraisal', 'Flood', and 'Mortgage Insurance'. The main content area is titled 'Order' and contains several form fields:

- Document Provider: DocMagic Direct
- Account Number: 100JJ
- Username: jessaca@docmagic.com
- Password: [Redacted]
- Request Type: Closing Package
- Package Type: Closing Documents
- Supplement Language: [Empty]
- Task: Process
- Return Document Packaging: Individual Documents
- Document Plan Code: DSI_CONV
- Loan Program: ALL FIXED LOANS
- Service Type: Esign
- Enable Electronic Signatures:
- Promissory Note: Electronic (eNote)
- Notary Documents: Electronic (eNotary)
- Notary Service Provider: Docmagic
- Submit MERS Registration:
- Alternate Lender Code: [Empty]
- Business Use:

The 'Official Documents' checkbox is highlighted with a green box. At the bottom of the form, there are buttons for 'Save', 'Custom 1', 'Custom 2', 'Custom 3', and 'Order'.

- If this box is unchecked, DocMagic will not keep the data. Unchecking this box is mostly reserved for running sample packages, which will be produced with a watermark

Return Document Package

The screenshot shows the 'path calyx' web application interface. At the top, there is a navigation bar with 'Loans' and a user profile '8175550196—Bob Borrower'. Below this is a breadcrumb trail: 'Summary > Credit > AUS > Initial/Closing Docs > Appraisal > Flood > Mortgage Insurance'. The main content area is titled 'Order' and contains several form fields:

- Document Provider: DocMagic Direct (dropdown)
- Account Number: 100JJ (text input)
- Username: jessaca@docmagic.com (text input)
- Password: [Redacted] (password input)
- Request Type: Closing Package (dropdown)
- Package Type: Closing Documents (dropdown)
- Supplement Language: [Empty] (dropdown)
- Task: Process (dropdown)
- Official Documents:
- Return Document Packaging: Individual Documents (dropdown, highlighted with a green box and a mouse cursor)
- Document Plan Code: [Empty] (dropdown)
- Loan Program: [Empty] (dropdown)
- Service Type: Esign (dropdown)
- Enable Electronic Signatures:
- Promissory Note: Electronic (eNote) (dropdown)
- Notary Documents: Electronic (eNotary) (dropdown)
- Notary Service Provider: Docmagic (dropdown)
- Submit MERS Registration:
- Alternate Lender Code: [Empty] (text input)
- Business Use:

At the bottom of the form, there are buttons for 'Save', 'Custom 1', 'Custom 2', 'Custom 3', and 'Order'.

- You can choose to receive the document package as individual documents, or as all forms in a single document

Document Plan Code + Loan Program

The screenshot shows the 'path calyx' web application interface. The top navigation bar includes 'Loans', '8175550196—Bob Borrower', 'Interfaces', and 'Initial/Closing Docs'. Below this is a secondary navigation bar with tabs for 'Summary', 'Credit', 'AUS', 'Initial/Closing Docs', 'Appraisal', 'Flood', and 'Mortgage Insurance'. The main content area is titled 'Order' and contains a form with the following fields:

Document Provider	DocMagic Direct	Request Type	Closing Package	Task	Process
Account Number	100JJ	Package Type	Closing Documents	Official Documents	<input checked="" type="checkbox"/>
Username	Jessaca@docmagic.com	Supplement Language		Return Document Packaging	Individual Documents
Password	*****			Document Plan Code	DSI_CONV
				Loan Program	ALL FIXED LOANS
				Service Type	Esign
				Enable Electronic Signatures	<input checked="" type="checkbox"/>
				Promissory Note	Electronic (eNote)
				Notary Documents	Electronic (eNotary)
				Notary Service Provider	Docmagic
				Submit MERS Registration	<input type="checkbox"/>
				Alternate Lender Code	
				Business Use	<input type="checkbox"/>

At the bottom of the form, there are buttons for 'Save', 'Custom 1', 'Custom 2', 'Custom 3', and 'Order'.

- Double check that your Document Plan Code and Loan Program are correct
- You may need to log into your [DocMagic Dashboard](#) to configure these

Service Type

path calyx

Loans 8175550196—Bob Borrower Interfaces Initial/Closing Docs

Summary Credit AUS Initial/Closing Docs Appraisal Flood Mortgage Insurance

Order

Document Provider: DocMagic Direct
Account Number: 100JJ
Username: jessaca@docmagic.com
Password:

Request Type: Closing Package
Package Type: Closing Documents
Supplement Language:

Task: Process
Official Documents:
Return Document Packaging: Individual Documents
Document Plan Code: DSI_CONV
Loan Program: ALL FIXED LOANS
Service Type: **Print Fulfillment** (highlighted in green)
Enable Electronic Signatures: Esign
Promissory Note: Electronic (eNote)
Notary Documents: Electronic (eNotary)
Notary Service Provider: Docmagic
Submit MERS Registration:
Alternate Lender Code:
Business Use:

Save Custom 1 Custom 2 Custom 3 Order

- Choose eSign or Print Fulfillment for Service Type
- eSign allows participants to electronically sign the documents
- If you select Print Fulfillment, we will print out the document package and mail it to you, and you will be charged accordingly

Enabling eSign Options

path calyx

Loans 8175550196—Bob Borrower Interfaces Initial/Closing Docs

Summary Credit AUS Initial/Closing Docs Appraisal Flood Mortgage Insurance

Order

Document Provider: DocMagic Direct
Account Number: 100J
Username: jessaca@docmagic.com
Password: *****

Request Type: Closing Package
Package Type: Closing Documents
Supplement Language: [Empty]

Task: Process
Official Documents:
Return Document Packaging: Individual Documents
Document Plan Code: DSL_CONV
Loan Program: ALL FIXED LOANS
Service Type: Esign
Enable Electronic Signatures:

Promissory Note: Electronic (eNote)
Notary Documents: Electronic (eNotary)
Notary Service Provider: Docmagic
Submit MERS Registration:
Alternate Lender Code: [Empty]
Business Use:

Save Custom 1 Custom 2 Custom 3 Order

- Remember to Enable Electronic Signatures for eSign
- Your Total eClose options are also here – we will go through them in the following slides

Promissory Note

The screenshot displays the 'path calyx' web application interface for a 'Promissory Note'. The interface includes a navigation bar with tabs for 'Loans', '8175550196—Bob Borrower', 'Interfaces', and 'Initial/Closing Docs'. Below the navigation bar, there are tabs for 'Summary', 'Credit', 'AUS', 'Initial/Closing Docs', 'Appraisal', 'Flood', and 'Mortgage Insurance'. The main content area is titled 'Order' and contains several form fields:

- Document Provider: DocMagic Direct
- Account Number: 100JJ
- Username: jessaca@docmagic.com
- Password: [Redacted]
- Request Type: Closing Package
- Package Type: Closing Documents
- Supplement Language: [Empty]
- Task: Process
- Official Documents:
- Return Document Packaging: Individual Documents
- Document Plan Code: DSL_CONV
- Loan Program: ALL FIXED LOANS
- Service Type: Esign
- Enable Electronic Signatures:
- Promissory Note: **Electronic (eNote)** (highlighted with a green box, showing a dropdown menu with options: Electronic (eNote), Paper/Ink, Electronic (eNote))
- Notary Documents: [Empty]
- Notary Service Provider: [Empty]
- Submit MERS Registration:
- Alternate Lender Code: [Empty]
- Business Use:

At the bottom of the form, there are buttons for 'Save', 'Custom 1', 'Custom 2', 'Custom 3', and 'Order'.

- Select whether you want the Promissory Note to be Paper or Electronic (eNote)
- The Blank option will automatically select DocMagic's default, which is a Paper Note

Notary Service Provider

The screenshot shows the 'path calyx' web application interface. The top navigation bar includes 'Loans', '8175550196—Bob Borrower', 'Interfaces', and 'Initial/Closing Docs'. Below this is a secondary navigation bar with tabs for 'Summary', 'Credit', 'AUS', 'Initial/Closing Docs', 'Appraisal', 'Flood', and 'Mortgage Insurance'. The main content area is titled 'Order' and contains a form with the following fields:

Document Provider	DocMagic Direct	Request Type	Closing Package	Task	Process
Account Number	100J	Package Type	Closing Documents	Official Documents	<input checked="" type="checkbox"/>
Username	Jessaca@docmagic.com	Supplement Language		Return Document Packaging	Individual Documents
Password	*****			Document Plan Code	DSI_CONV
				Loan Program	ALL FIXED LOANS
				Service Type	Esign
				Enable Electronic Signatures	<input checked="" type="checkbox"/>
				Promissory Note	Electronic (eNote)
				Notary Documents	Electronic (eNotary)
				Notary Service Provider	Docmagic
				Submit MERS Registration	
				Alternate Lender Code	
				Business Use	

At the bottom of the form, there are buttons for 'Save', 'Custom 1', 'Custom 2', 'Custom 3', and 'Order'. The 'Notary Service Provider' dropdown menu is open, showing a list of options: 'Docmagic', 'Notarize', 'NotaryCam', and 'WorldWideNotary'. The 'Docmagic' option is highlighted with a blue bar and a green border.

- Select your Notary Service Provider here
- Choose DocMagic for RON option

Alt. Lender | Business Loan

path calyx

Loans ▾ 8175550196—Bob Borrower ✕ ▾ Interfaces ▾ Initial/Closing Docs ▾

Summary Credit AUS Initial/Closing Docs Appraisal Flood Mortgage Insurance

Order

Document Provider: DocMagic Direct ▾ Request Type: Closing Package ▾ Task: Process ▾

Account Number: 100JJ Package Type: Closing Documents ▾ Official Documents:

Username: jessaca@docmagic.com Supplement Language: ▾ Return Document Packaging: Individual Documents ▾

Password: ***** Document Plan Code: DSL_CONV [copy] [trash]

Loan Program: ALL FIXED LOANS

Service Type: ▾

Enable Electronic Signatures:

Promissory Note: ▾

Notary Documents: ▾

Notary Service Provider: ▾

Submit MERS Registration:

Alternate Lender Code: [text input]

Business Use:

Save Custom 1 Custom 2 Custom 3 Order

- If you have an Alternate Lender Code, enter it here
- Check the box below if it is a Business Purpose Loan.

Send it!

The screenshot shows the 'path calyx' web application interface. At the top, there is a navigation bar with tabs for 'Loans', '8175550196—Bob Borrower', 'Interfaces', and 'Initial/Closing Docs'. Below this is a secondary navigation bar with tabs for 'Summary', 'Credit', 'AUS', 'Initial/Closing Docs', 'Appraisal', 'Flood', and 'Mortgage Insurance'. The main content area is titled 'Order' and contains a form with the following fields:

Document Provider	DocMagic Direct	Request Type	Closing Package	Task	Process
Account Number	100JJ	Package Type	Closing Documents	Official Documents	<input checked="" type="checkbox"/>
Username	Jessaca@docmagic.com	Supplement Language		Return Document Packaging	Individual Documents
Password	*****			Document Plan Code	DSI_CONV
				Loan Program	ALL FIXED LOANS
				Service Type	Esign
				Enable Electronic Signatures	<input checked="" type="checkbox"/>
				Promissory Note	Electronic (eNote)
				Notary Documents	Electronic (eNotary)
				Notary Service Provider	Docmagic
				Submit MERS Registration	<input type="checkbox"/>
				Alternate Lender Code	
				Business Use	<input type="checkbox"/>

At the bottom of the form, there is a row of buttons: 'Save', 'Custom 1', 'Custom 2', 'Custom 3', and 'Order'. The 'Order' button is highlighted with a green border.

- When you're all ready, select Order

One More Click!



Loans ▾ @ 8175550196—Bob Borrower × ▾ Interfaces ▾ Initial/Closing Docs ▾

Summary Credit AUS Initial/Closing Docs Appraisal Flood Mortgage Insurance

Order

Document Provider: DocMagic Direct ▾ Request Type: Closing Package ▾ Task: Process ▾

Account Number: 100J Package Type: Closing Documents ▾ Official Documents:

Username: jessica@docmagic.com Supplement Language: ▾ Return Document: Individual Documents ▾

Password:

Selected Disclosed Status ✕

Action Date/Time	By	Compliance Status
You have not selected a Loan Estimate Status.		

Order

Notary Documents: Electronic (eNotary) ▾

Notary Service Provider: Docmagic ▾

Submit MERS Registration:

Alternate Lender Code:

Business Use:

Save Custom 1 Custom 2 Custom 3 Order

- This window will pop up. Click Order, and your documents will process!

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.