



CalyxPath

CalyxPath

Getting Started

Start by opening CalyxPath in a web browser.
Enter your credentials and Log In.



Select your file.

The screenshot displays the CalyxPath interface with a table of loans. The table has columns for Loan Number, Loan Servicer #, LO Name, OU Name, Borrower First Last Name, Subject Property Street, and Loan Status. The row with Loan Number 64092 is highlighted in green, and a blue arrow points from the text 'Select your file.' to this row.

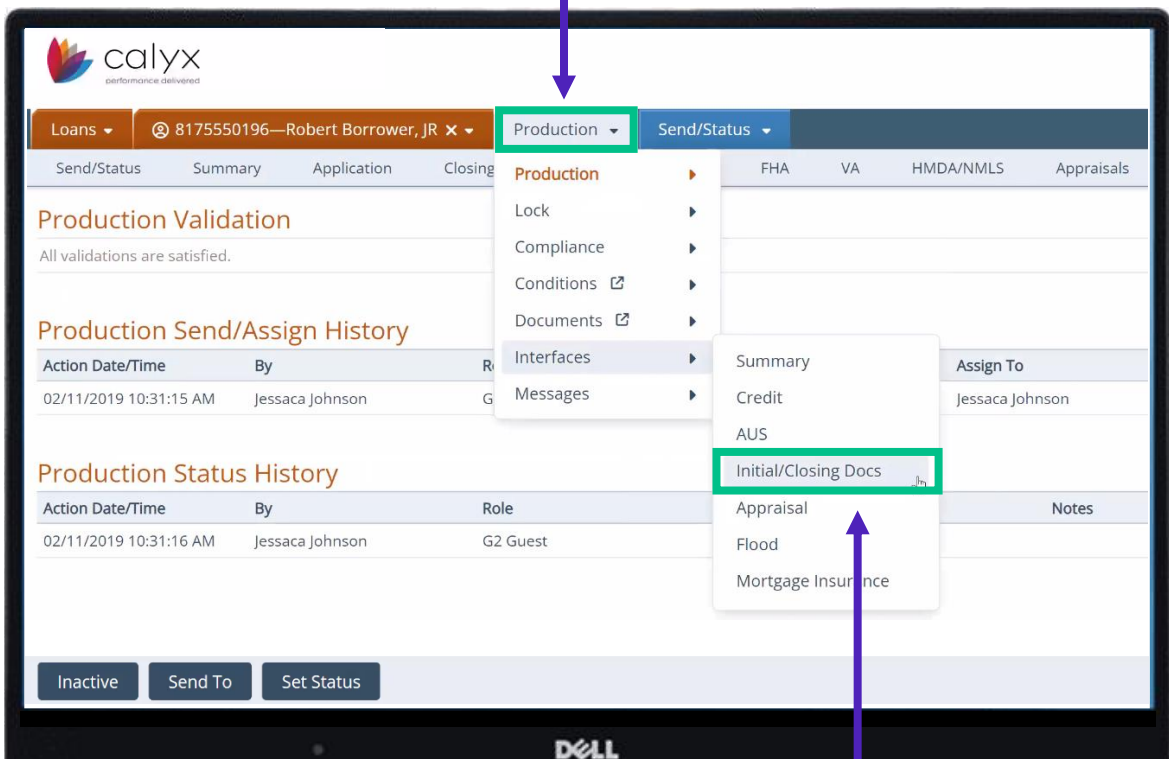
<input type="checkbox"/>	Loan Number	Loan Servicer #	LO Name	OU Name	Borrower First Last Name	Subject Property Street	Loan Status
<input type="checkbox"/>	8175550959	7356	Jessaca Johnson	DocMagic			Application Taken
<input type="checkbox"/>	8175550760	6720	Jessaca Johnson	DocMagic			Application Taken
<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



CalyxPath

Production → Interfaces → Initial/Closing Docs

Select Production from the top.



Scroll down to Interfaces, then select Initial/Closing Docs.



CalyxPath

Initial/Closing Docs

You are now on the Initial/Closing Docs screen.

The screenshot displays the CalyxPath interface for the 'Initial/Closing Docs' screen. The navigation bar at the top includes tabs for 'Loans', '8175550196—Bob Borrower', 'Interfaces', and 'Initial/Closing Docs'. The 'Initial/Closing Docs' tab is highlighted with a green box. 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 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	DSJ_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'. The Dell logo is visible at the bottom center of the screen.



Select DocMagic Direct as your Document Provider. Enter in your Account Number and your credentials (Username/Password).

The screenshot displays the CalyxPath web application interface. The top navigation bar includes 'Loans', '8175550196—Bot', 'Interfaces', and 'Initial/Closing Docs'. Below the navigation bar are tabs for 'Summary', 'Credit', 'AUS', 'Initial/Closing Docs', 'Appraisal', 'Flood', and 'Mortgage Insurance'. The 'Order' form is visible, with a green box highlighting the 'Document Provider' dropdown menu, which is set to 'DocMagic Direct'. The 'Account Number' field contains '100J', the 'Username' field contains 'jessaca@docmagic.com', and the 'Password' field is masked with asterisks. A blue arrow points from the text box above to the 'DocMagic Direct' dropdown. The interface includes various fields for 'Request Type', 'Package Type', 'Supplement Language', 'Task', 'Official Documents', 'Return Document Packaging', 'Document Plan Code', 'Loan Program', 'Service Type', 'Enable Electronic Signatures', 'Promissory Note', 'Notary Documents', 'Notary Service Provider', 'Submit MERS Registration', 'Alternate Lender Code', and 'Business Use'. At the bottom of the form are buttons for 'Save', 'Custom 1', 'Custom 2', 'Custom 3', and 'Order'.



Select Initial Disclosures or Closing Package from Request Type.

The screenshot displays the CalyxPath web application interface. At the top, the Calyx logo is visible. Below it, a navigation bar includes tabs for 'Loans', '8175550196—Bob Borrower', 'Interfaces', and 'Initial/Closing Docs'. The 'Initial/Closing Docs' tab is active, and a sub-menu shows options for 'Summary', 'Credit', 'AUS', 'Initial/Closing Docs', 'Appraisal', 'Flood', and 'Mortgage Insurance'. The main content area is titled 'Order' and contains several input fields and dropdown menus. The 'Request Type' dropdown menu is highlighted with a green box, and a blue arrow points to it from the instruction box above. The dropdown menu shows three options: 'Closing Package' (highlighted in orange), 'Initial Disclosures' (highlighted in yellow), and 'Closing Package' (highlighted in blue). Other fields include 'Document Provider' (DocMagic Direct), 'Account Number' (100J), 'Username' (jessaca@docmagic.com), and 'Password'. To the right, there are various checkboxes and dropdown menus for 'Task', 'Official Documents', 'Return Document Packaging', 'Document Plan Code', 'Loan Program', 'Service Type', 'Enable Electronic Signatures', 'Promissory Note', 'Notary Documents', 'Notary Service Provider', 'Submit MERS Registration', 'Alternate Lender Code', and 'Business Use'. At the bottom, there are buttons for 'Save', 'Custom 1', 'Custom 2', 'Custom 3', and 'Order'. The Dell logo is visible at the bottom center of the screen.



After choosing Request Type, select a Package Type.

The screenshot displays the CalyxPath web application interface. The top navigation bar includes the Calyx logo and the text "performance delivered". Below the navigation bar, there are tabs for "Loans", "8175550196—Bob Borrower", "Interfaces", and "Initial/Closing Docs". The "Initial/Closing Docs" tab is active, and the sub-tabs are "Summary", "Credit", "AUS", "Initial/Closing Docs", "Appraisal", "Flood", and "Mortgage Insurance".

The main content area is titled "Order" and contains several input fields and dropdown menus:

- Document Provider:** DocMagic Direct (dropdown)
- Account Number:** 100J (text input)
- Username:** jessaca@docmagic.com (text input)
- Password:** (password input)
- Request Type:** Initial Disclosures (dropdown)
- Package 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)
- 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 (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". The Dell logo is visible at the bottom center of the screen.

Your options for Package Type are determined by what Request Type you select.



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

The screenshot displays the CalyxPath web application interface. The top navigation bar includes the Calyx logo and the text "performance delivered". Below the navigation bar, there are tabs for "Loans", "8175550196—Bob Borrower", "Interfaces", and "Initial/Closing Docs". The "Initial/Closing Docs" tab is active, and a sub-menu shows options for "Summary", "Credit", "AUS", "Initial/Closing Docs", "Appraisal", "Flood", and "Mortgage Insurance".

The main content area is titled "Order" and contains several input fields and dropdown menus. The "Request Type" dropdown is set to "Closing Package", and its dropdown menu is open, showing options: "Closing Documents", "Closing Disclosure", "Pre-Closing", and "Post-Closing". The "Closing Documents" option is highlighted in orange, and the "Post-Closing" option is highlighted in blue. A mouse cursor is pointing at the "Post-Closing" option.

Other fields include "Document Provider" (DocMagic Direct), "Account Number" (100j), "Username" (jessaca@docmagic.com), and "Password" (masked). The "Task" dropdown is set to "Process", and the "Official Documents" checkbox is checked. The "Return Document Packaging" dropdown is set to "Individual Documents", and the "Document Plan Code" is "DSI_CONV". The "Loan Program" is "ALL FIXED LOANS", and the "Service Type" is "Esign". The "Enable Electronic Signatures" checkbox is checked, and the "Promissory Note" dropdown is set to "Electronic (eNote)". The "Notary Documents" dropdown is set to "Electronic (eNotary)", and the "Notary Service Provider" is "Docmagic". The "Submit MERS Registration" checkbox is unchecked, and the "Alternate Lender Code" and "Business Use" checkboxes are also unchecked.

At the bottom of the form, there are buttons for "Save", "Custom 1", "Custom 2", "Custom 3", and "Order". The Dell logo is visible at the bottom center of the screen.



CalyxPath

Supplemental Language

Path does include a Supplemental Language option, where you can get the documents back in a different language.

The screenshot displays the CalyxPath web application interface. The top navigation bar includes the Calyx logo and the tagline "performance delivered". Below the navigation bar, there are tabs for "Loans", "8175550196—Bob Borrower", "Interfaces", and "Initial/Closing Docs". The main content area is titled "Order" and contains several form fields and dropdown menus. The "Supplement Language" dropdown menu is highlighted with a green border, and its options are listed: Chinese, Korean, Spanish, Tagalog, and Vietnamese. A blue arrow points from the text box above to this dropdown menu. The interface also includes fields for "Document Provider", "Account Number", "Username", and "Password", as well as "Request Type", "Package Type", "Task", "Official Documents", "Return Document Packaging", "Document Plan Code", "Loan Program", "Service Type", "Enable Electronic Signatures", "Promissory Note", "Notary Documents", "Notary Service Provider", "Submit MERS Registration", "Alternate Lender Code", and "Business Use". At the bottom of the form, there are buttons for "Save", "Custom 1", "Custom 2", "Custom 3", and "Order".

This is not set up by default. Please check with customer service before enabling this.



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

The screenshot displays the CalyxPath web application interface. At the top, the Calyx logo is visible with the tagline "performance delivered". Below the logo, there is a navigation bar with tabs for "Loans", "8175550196—Bob Borrower", "Interfaces", and "Initial/Closing Docs". A secondary navigation 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 input fields and dropdown menus. The "Task" dropdown menu is highlighted with a green box, and a purple arrow points to it from the text above. The "Task" dropdown menu has four options: "Process" (highlighted in orange), "Audit" (highlighted in blue), "Process" (highlighted in blue), and "Save" (highlighted in orange). Other fields include "Document Provider" (DocMagic Direct), "Account Number" (100J), "Username" (jessaca@docmagic.com), "Password" (masked), "Request Type" (Closing Package), "Package Type" (Closing Documents), "Supplement Language", "Official Documents", "Return Document Packaging", "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", and "Business Use" (unchecked). At the bottom of the form, there are buttons for "Save", "Custom 1", "Custom 2", "Custom 3", and "Order".



CalyxPath

Official Documents

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.

The screenshot displays the CalyxPath web application interface. The top navigation bar includes the Calyx logo and the text "performance delivered". Below the navigation bar, there are tabs for "Loans", "8175550196—Bob Borrower", "Interfaces", and "Initial/Closing Docs". The "Initial/Closing Docs" tab is active, and a sub-menu shows options for "Summary", "Credit", "AUS", "Initial/Closing Docs", "Appraisal", "Flood", and "Mortgage Insurance".

The main content area is titled "Order" and contains several input fields and dropdown menus. The "Document Provider" is set to "DocMagic Direct", "Request Type" is "Closing Package", and "Task" is "Process". The "Account Number" is "100J", "Package Type" is "Closing Documents", and "Official Documents" is checked. The "Username" is "jessaca@docmagic.com" and "Password" is masked with asterisks. Other fields include "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". The Dell logo is visible at the bottom center of the screen.



CalyxPath

Return Document Package

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

The screenshot displays the CalyxPath web application interface for configuring a document package. The page is titled "Order" and features several form fields and dropdown menus. A purple arrow points from the text above to the "Return Document Packaging" dropdown menu, which is currently open and shows three options: "Individual Documents", "All Forms in One Document", and "Individual Documents". The "All Forms in One Document" option is highlighted in blue. The form fields include:

- 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: [Checked]
- Return Document Packaging: [Open dropdown menu]
- Document Plan Code: [Empty]
- Loan Program: ALL FRAED 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 page, there are buttons for "Save", "Custom 1", "Custom 2", "Custom 3", and "Order".



CalyxPath

Document Plan Code + Loan Program

Double check that your Document Plan Code and Loan Program are correct.

The screenshot displays the CalyxPath web application interface. The top navigation bar includes the Calyx logo and the text "performance delivered". Below the navigation bar, there are tabs for "Loans", "8175550196—Bob Borrower", "Interfaces", and "Initial/Closing Docs". 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: [Checked]
- Return Document: 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]
- Business Use: [Unchecked]

At the bottom of the form, there are buttons for "Save", "Custom 1", "Custom 2", "Custom 3", and "Order". The Dell logo is visible at the bottom center of the screen.

You may need to log into your [DocMagic Dashboard](#) to configure these.



Choose E-Sign or Print Fulfillment for Service Type.

The screenshot displays the CalyxPath web application interface. The top navigation bar includes the Calyx logo and the tagline "performance delivered". Below the navigation bar, there are tabs for "Loans", "8175550196—Bob Borrower", "Interfaces", and "Initial/Closing Docs". The main content area is titled "Order" and contains several form fields:

- Document Provider: DocMagic Direct
- Account Number: 100J
- 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: DSI_CONV
- Loan Program: ALL FIXED LOANS
- Service Type: Esign (highlighted in green)
- Enable Electronic Signatures:
- Promissory Note: [Empty]
- 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". A purple arrow points from the instruction box above to the "Service Type" dropdown menu, which is currently open and showing "Esign" and "Print Fulfillment" as options.

E-Sign 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.



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Enable Electronic Signatures, Total eClose Options

Remember to Enable Electronic Signatures for ESign.

The screenshot displays the CalyxPath web application interface for creating a closing package. The top navigation bar includes the Calyx logo and the text "performance delivered". Below the navigation bar, there are tabs for "Loans", "8175550196—Bob Borrower", "Interfaces", and "Initial/Closing Docs". The main content area is titled "Order" and contains several sections of form fields. The "Document Provider" section includes fields for "Document Provider" (DocMagic Direct), "Account Number" (100J), "Username" (jessaca@docmagic.com), and "Password" (masked). The "Request Type" section includes "Request Type" (Closing Package), "Package Type" (Closing Documents), and "Supplement Language". The "Task" section includes "Task" (process), "Official Documents" (Individual Documents), "Return Document" (SI_CONV), "Packaging" (LL FIXED LOANS), and "Service Type" (esign). The "Enable Electronic Signatures" section includes a checked checkbox. The "Promissory Note" section includes a dropdown menu (Electronic (eNote)). The "Notary Documents" section includes a dropdown menu (Electronic (eNotary)). The "Notary Service Provider" section includes a dropdown menu (Docmagic). The "Submit MERS Registration" section includes a checkbox. The "Alternate Lender Code" section includes a text input field. The "Business Use" section includes a text input field. At the bottom of the form, there are buttons for "Save", "Custom 1", "Custom 2", "Custom 3", and "Order".

Your Total eClose options are here – we'll go through them on the following slides.



CalyxPath

Promissory Note

Select whether you want the Promissory Note to be Paper or Electronic (eNote).

The screenshot displays the CalyxPath web application interface. The top navigation bar includes the Calyx logo and the text "performance delivered". Below this, there are tabs for "Loans", "817550196—Bob Borrower", "Interfaces", and "Initial/Closing Docs". The main content area is titled "Order" and contains several form fields and dropdown menus. The "Promissory Note" dropdown menu is highlighted in yellow, and a purple arrow points to it from the instruction box above. The dropdown menu options are "Electronic (eNote)", "Paper/Ink", and "Electronic (eNote)".

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	DSL CONV
				Loan Program	ALL FIRED LOANS
				Service Type	Esign
				Enable Electronic Signatures	<input checked="" type="checkbox"/>
				Promissory Note	Electronic (eNote)
				Notary Documents	Paper/Ink
				Notary Service Provider	Electronic (eNote)
				Submit MERS Registration	<input type="checkbox"/>
				Alternate Lender Code	
				Business Use	<input type="checkbox"/>

The blank option will automatically select DocMagic's default, which is a Paper Note.



CalyxPath

Notary Documents

Select whether you want the notarization to be In Person (Paper/Ink) or Electronic (eNotary).

The screenshot displays the CalyxPath web application interface. The top navigation bar includes the Calyx logo and the text "performance delivered". Below the navigation bar, there are tabs for "Loans", "8175550196—Bob Borrower", "Interfaces", and "Initial/Closing Docs". The "Initial/Closing Docs" tab is active, and the sub-tabs include "Summary", "Credit", "AUS", "Initial/Closing Docs", "Appraisal", "Flood", and "Mortgage Insurance".

The main content area is titled "Order" and contains several form fields and dropdown menus:

- 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: [Empty]
- Official Documents:
- Return Document Packaging: Individual Documents
- Document Plan Code: DSL_COV [Copy] [Delete]
- Loan Program: ALL FIXED LOANS
- Service Type: Esign
- Enable Electronic Signatures:
- Promissory Note: Electronic (eNote)
- Notary Documents: **Electronic (eNotary)** (highlighted by a purple arrow)
- Notary Service Provider: Paper/Ink
- Submit MERS Registration: Electronic (eNotary)
- 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". The Dell logo is visible at the bottom center of the screen.



CalyxPath

Notary Service Provider

Select your Notary Service Provider here.

The screenshot shows the CalyxPath web application interface. The top navigation bar includes the Calyx logo and the text "performance delivered". Below the navigation bar, there are tabs for "Loans", "8175550196—Bob Borrower", "Interfaces", and "Initial/Closing Docs". The "Initial/Closing Docs" tab is selected, and the sub-tabs are "Summary", "Credit", "AUS", "Initial/Closing Docs", "Appraisal", "Flood", and "Mortgage Insurance".

The main content area is titled "Order" and contains several input fields and dropdown menus:

- Document Provider: DocMagic Direct
- Account Number: 100jj
- Username: Jessaca@docmagic.com
- Password: [Redacted]
- Request Type: Closing Package
- Package Type: Closing Documents
- Supplement Language: [Blank]
- Task: Process
- Official Documents:
- Return Document Packaging: Individual Documents
- Document Plan Code: DSL/ONV
- Loan Program: ALL FIXED LOANS
- Service Type: Esig
- Enable Electronic Signatures:
- Promissory Note: Electronic (eNote)
- Notary Documents: Electronic (eNotary)
- Notary Service Provider: Docmagic (selected)
- Submit MERS Registration: Docmagic
- Alternate Lender Code: Notarize
- Business Use: NotaryCam
- WorldWideNotary

At the bottom of the form, there are buttons for "Save", "Custom 1", "Custom 2", "Custom 3", and "Order". The Dell logo is visible at the bottom center of the screen.

Choose Docmagic for DocMagic RON. Other notarization vendors include *Notarize*, *NotaryCam*, or *WorldWideNotary*. The blank option is for non-notarized packages.



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Submit MERS Registration

Submit MERS Registration has nothing to do for eSign. Check this if you want to send a *non-electronic* closing package to MERS.

The screenshot displays the CalyxPath web application interface. The top navigation bar includes the Calyx logo and the text "performance delivered". Below the navigation bar, there are tabs for "Loans", "8175550196—Bob Borrower", "Interfaces", and "Initial/Closing Docs". The "Initial/Closing Docs" tab is active, and the "Order" form is displayed. The form contains several fields and checkboxes:

- Document Provider: DocMagic Direct
- Account Number: 100J
- Username: Jessaca@docmagic.com
- Password: [Redacted]
- Request Type: Closing Package
- Package Type: Closing Documents
- Supplement Language: [Empty]
- Task: [Empty]
- Process: [Empty]
- Official Documents: [Checked]
- Return Document Packaging: [Empty]
- Document Plan Code: DSJ_CONV
- Loan Program: ALL FIXED LOANS
- Service Type: [Empty]
- Enable Electronic Signatures: [Empty]
- Promissory Note: [Empty]
- 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". The Dell logo is visible at the bottom center of the screen.



CalyxPath

Alt Lender / Business Loan

If you have an Alternate Lender Code, enter it here.

The screenshot displays the CalyxPath web application interface. At the top, the Calyx logo is visible with the tagline "performance delivered". Below the logo, there are navigation tabs: "Loans", "8175550196—Bob Borrower", "Interfaces", and "Initial/Closing Docs". A secondary navigation bar includes "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: 100j (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)
- Document Plan Code: DSI CONV (text input)
- Loan Program: ALL FIXED LOANS (dropdown)
- Service Type: [Empty] (dropdown)
- Enable Electronic Signatures:
- Promissory Note: [Empty] (dropdown)
- Notary Documents: [Empty] (dropdown)
- Notary Service Provider: [Empty] (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". The Dell logo is visible at the bottom center of the screen.

Check this box if it is a Business Purpose Loan.



If everything looks good, select Order.

The screenshot displays the CalyxPath web application interface. At the top, the Calyx logo is visible with the tagline "performance delivered". The navigation bar includes "Loans", "8175550196—Bob Borrower", "Interfaces", and "Initial/Closing Docs". Below this, a breadcrumb trail shows "Summary", "Credit", "AUS", "Initial/Closing Docs", "Appraisal", "Flood", and "Mortgage Insurance".

The main form is titled "Order" and contains several sections of input fields:

- Document Provider:** DocMagic Direct (dropdown)
- Account Number:** 100j (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)
- 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:** [Empty] (text input)
- Business Use:**

At the bottom of the form, there are five buttons: "Save", "Custom 1", "Custom 2", "Custom 3", and "Order". A blue arrow points from the instruction box above to the "Order" button.



This window will pop up. Click Order.

