



DocMaster

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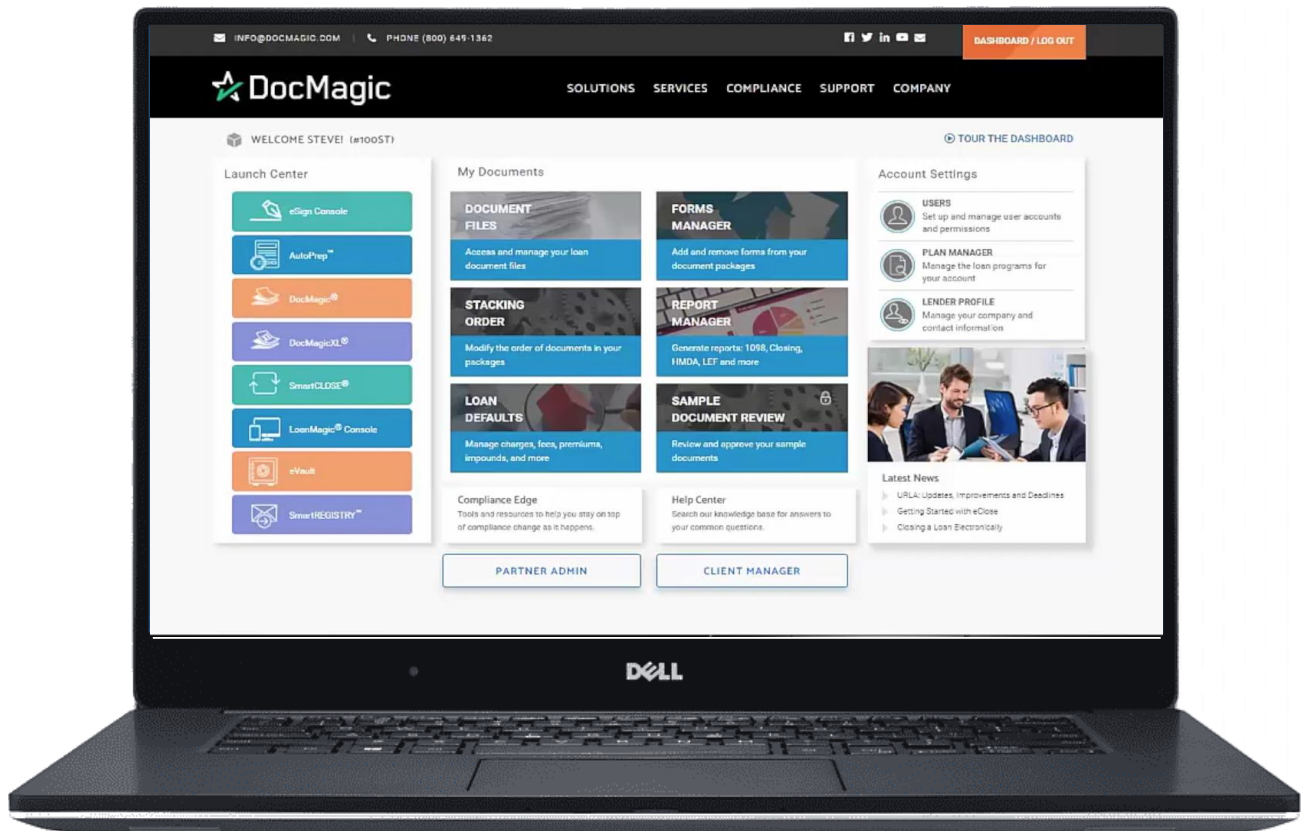
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DocMaster

Before Getting Started

Anyone using DocMaster will first need to have their user profile correctly configured in DocMagic.com.



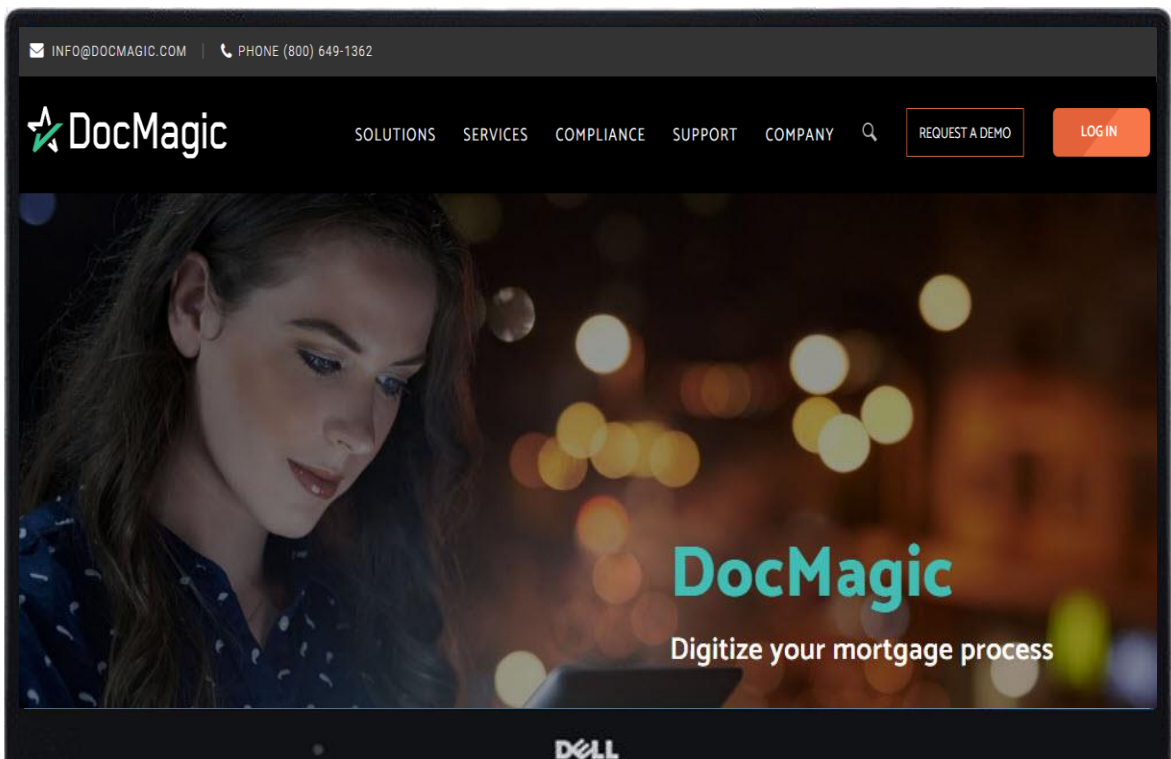
Admin privileges are required for user set-up.



DocMagic

Logging onto DocMagic

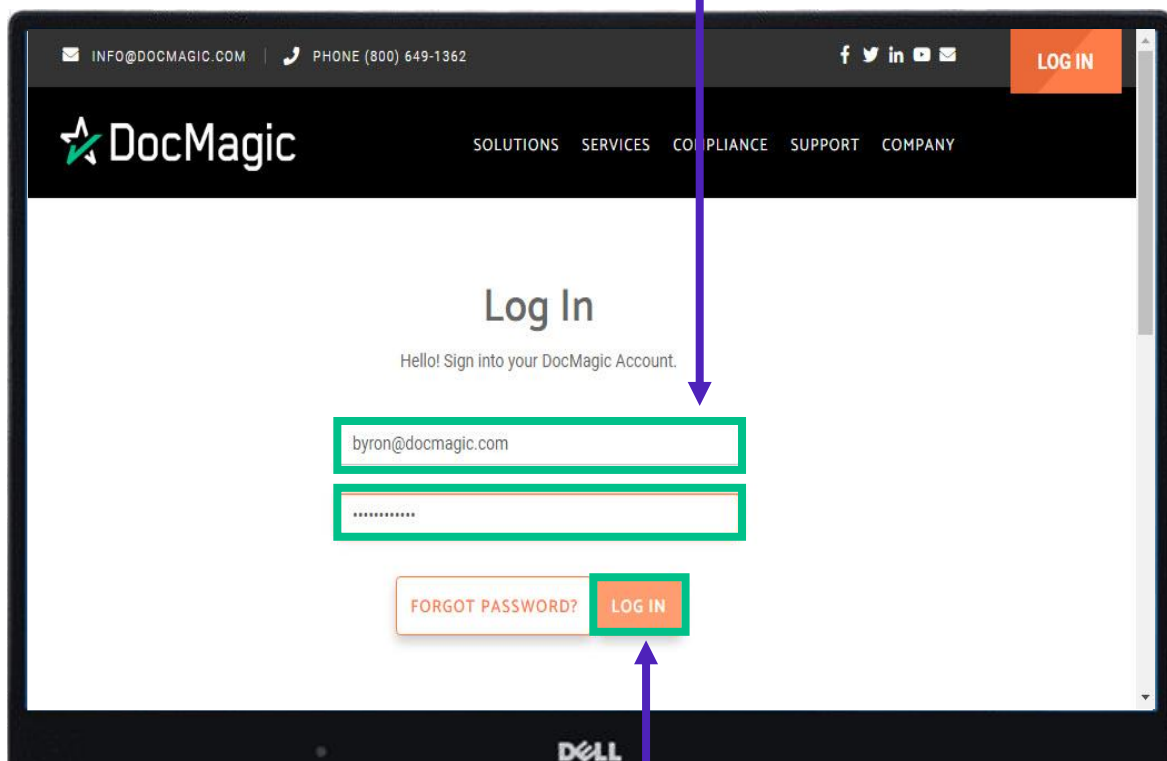
Go to www.docmagic.com



DocMaster

Logging onto DocMagic

Enter your email and password.



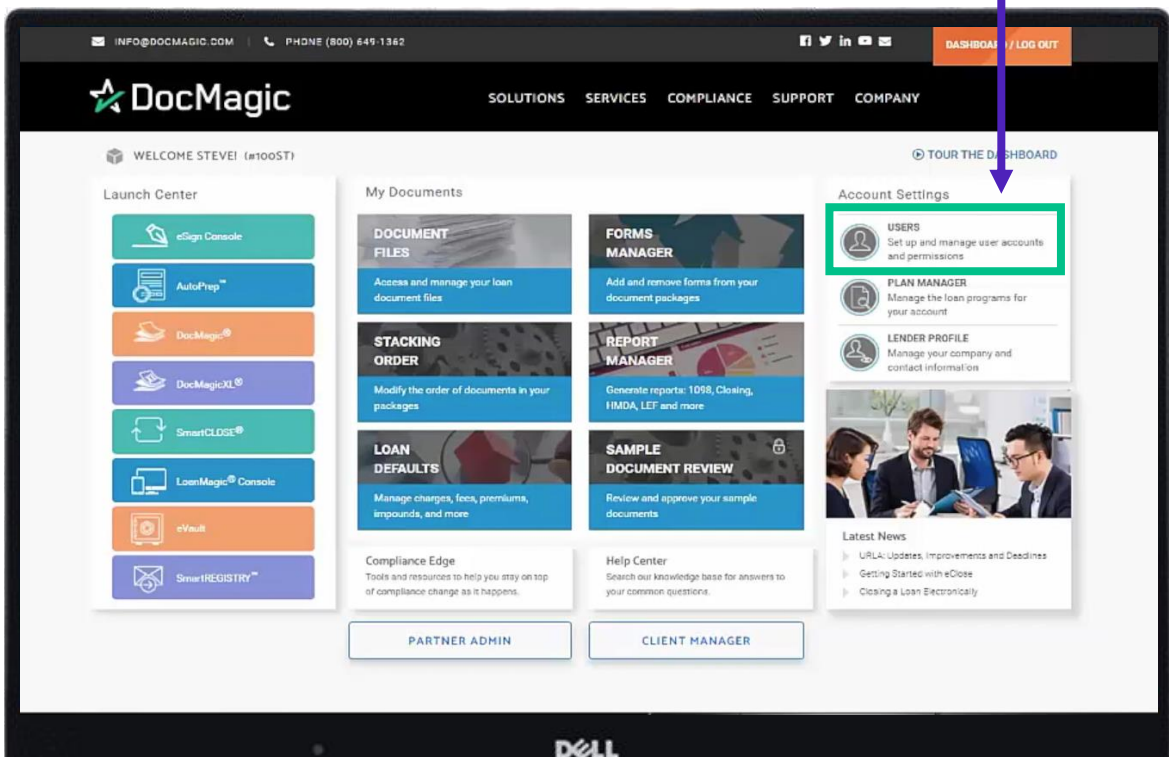
Click "LOG IN".



DocMaster

User Permissions

To check if a user profile is set up correctly – click on users.



DocMagic

User Permissions

Click on a user's last name, first name, or user email to view and access their account set up.

The screenshot shows the DocMagic 'User Accounts' interface. At the top, there is a navigation bar with contact information (INFO@DOCMAGIC.COM, PHONE (800) 649-1362), social media icons, and a 'DASHBOARD / LOG OUT' button. Below the navigation bar is a menu with 'SOLUTIONS', 'SERVICES', 'COMPLIANCE', 'SUPPORT', and 'COMPANY'. The main content area is titled 'User Accounts' and includes a 'Show 10 entries' dropdown and a search box. A table lists user accounts with columns for 'LAST NAME', 'FIRST NAME', 'USER EMAIL', and 'REMOVE'. The table contains one entry: 'Dai', 'Alan', and 'aland@docmagic.com'. Three callout boxes with arrows point to 'Dai', 'Alan', and 'aland@docmagic.com' respectively. Below the table, it says 'Showing 1 to 1 of 1 entries' and has pagination controls (First, Previous, 1, Next, Last). At the bottom of the interface are three buttons: 'ADD USER', 'ROLES', and 'FINISHED'. The Dell logo is visible at the bottom center of the screen.

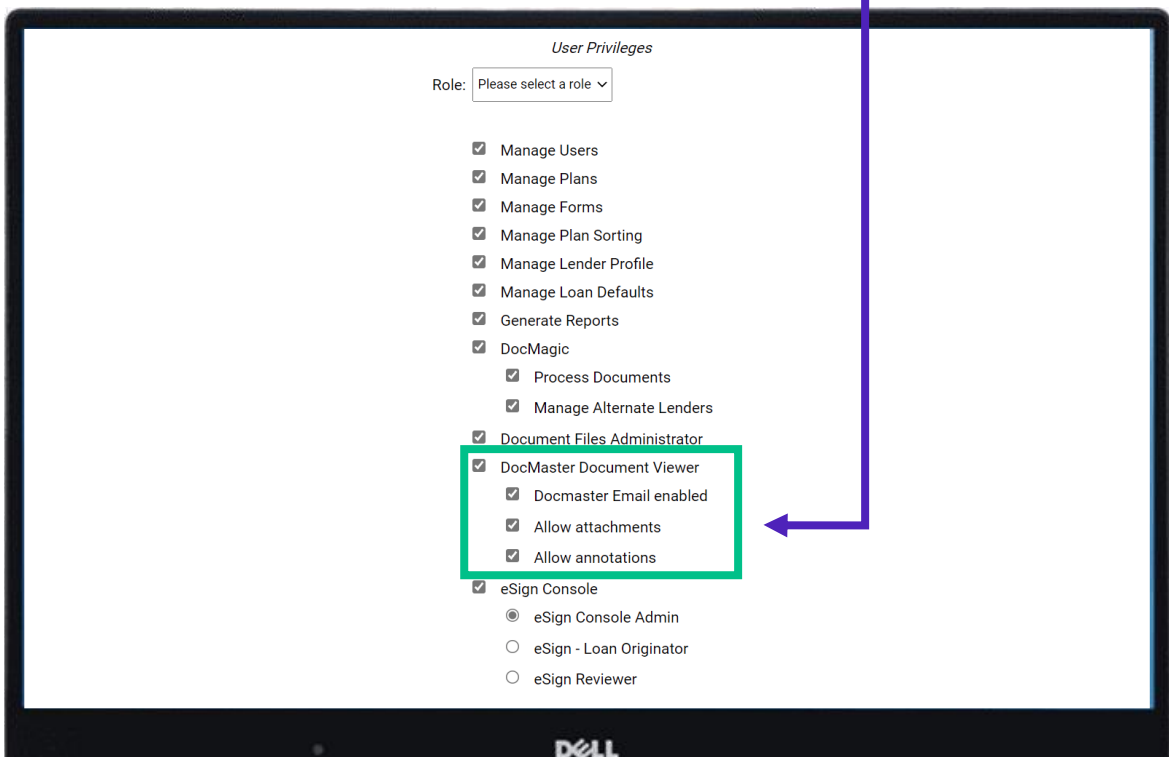
LAST NAME	FIRST NAME	USER EMAIL	REMOVE
Dai	Alan	aland@docmagic.com	



DocMaster

User Permissions

Scroll down to User Privileges – specifically, the DocMaster ones highlighted below.



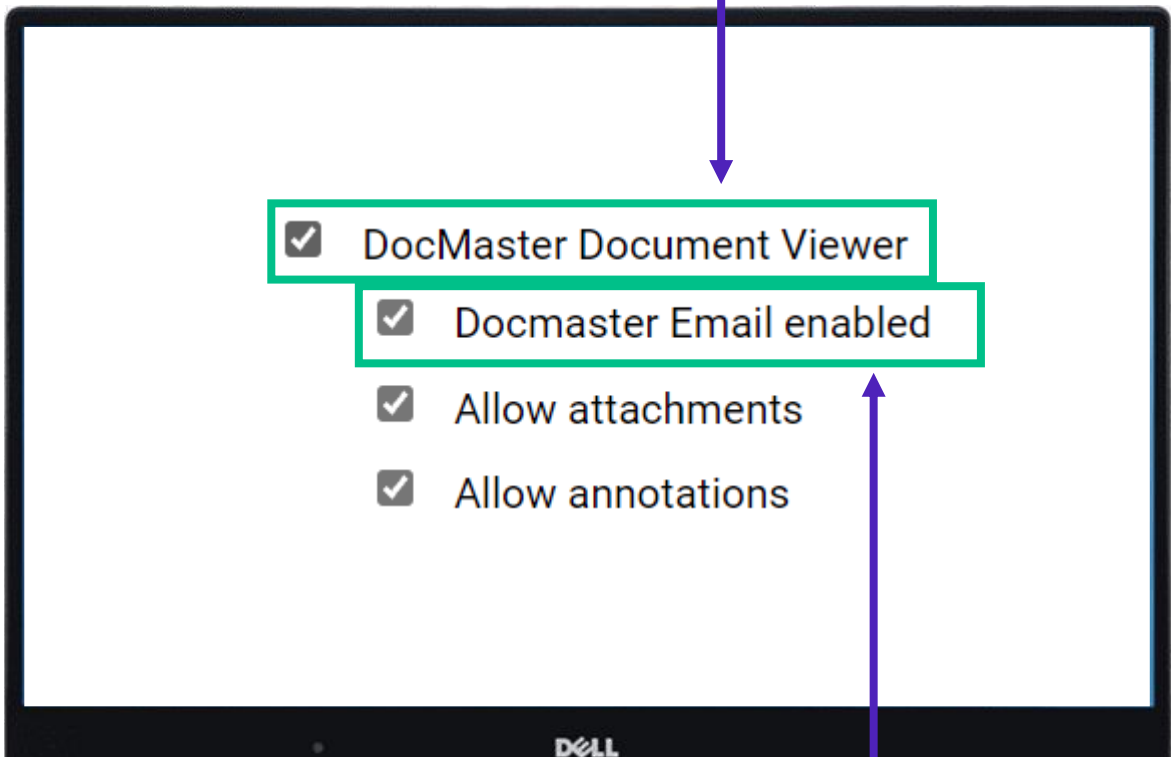
The next slides will break down these privileges.



DocMaster

Permission Definitions

DocMaster Document Viewer: Must be checked in order to use DocMaster.



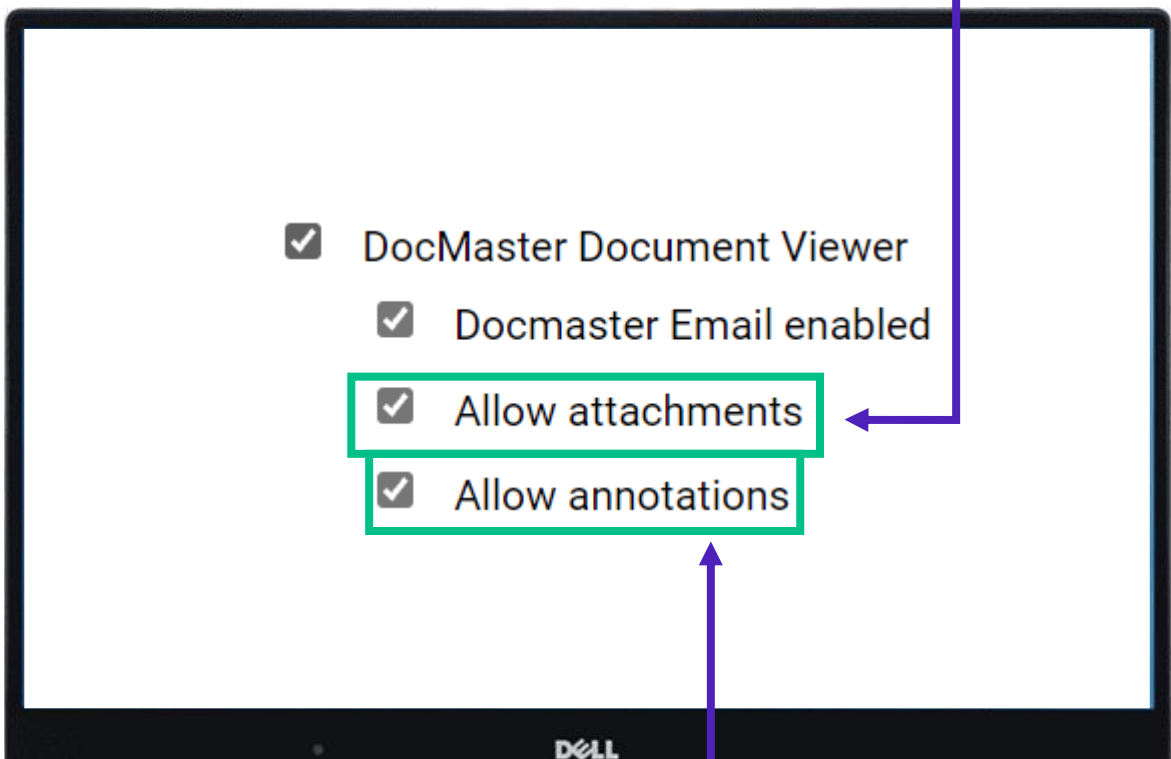
DocMaster Email enabled: Checking this box gives a user access to DocMaster's secure email solution.



DocMaster

Permission Definitions

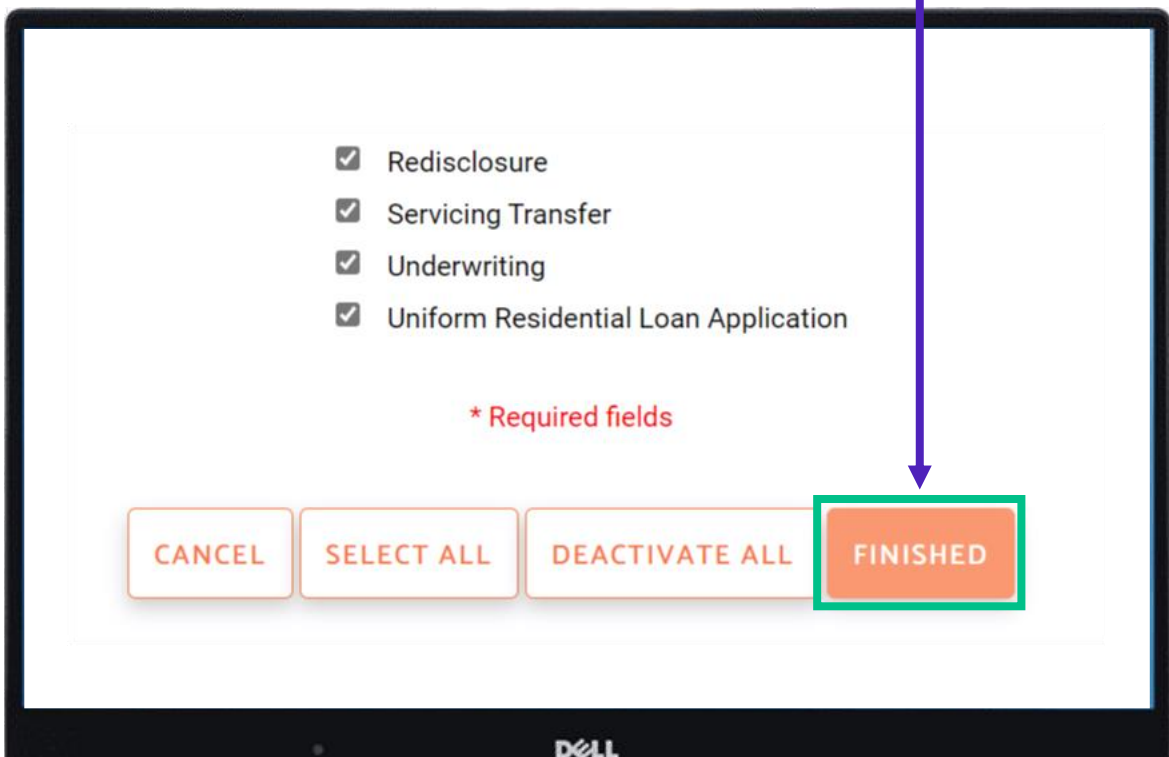
Allow Attachments: Checking this box gives the user ability to attach additional PDF documents to packages.



Allow Annotations: Checking this box allows the user to add text to a form.



As always, if any changes have been made to a user profile, scroll down to the bottom of the page and hit Finished to save changes.



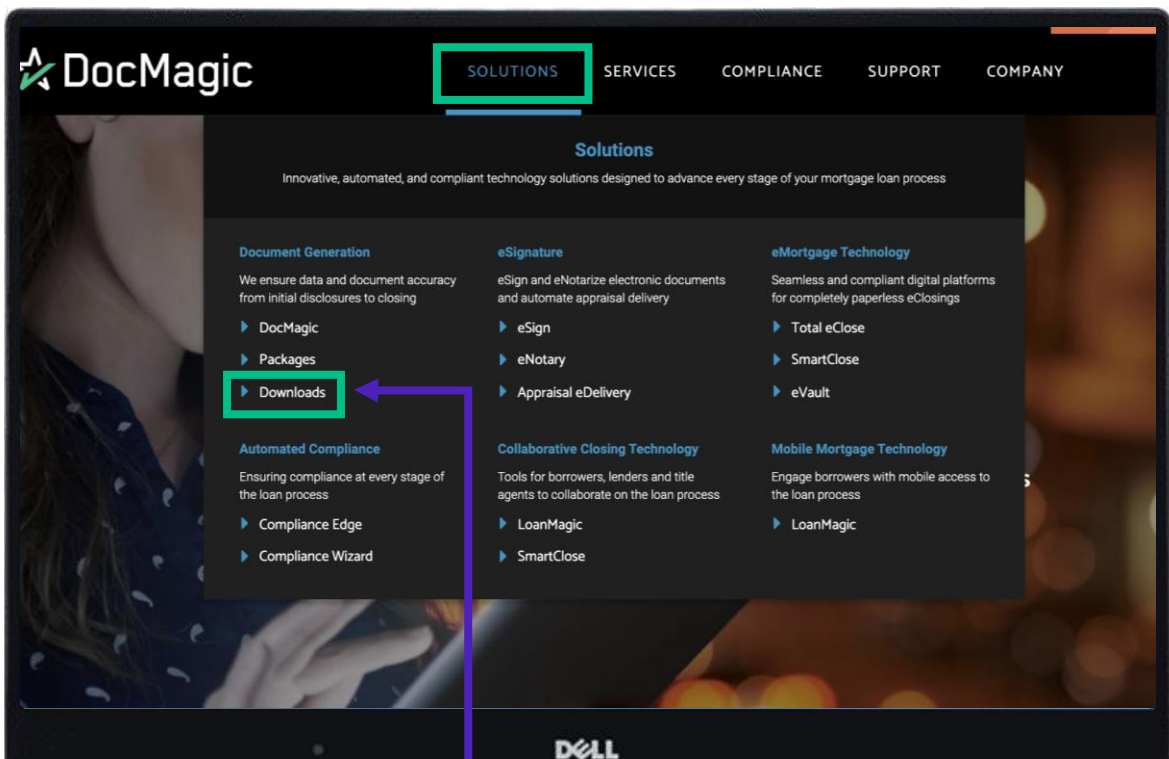
Clicking finished brings you back to the dashboard.



DocMaster

Downloading and Installing DocMaster

To access DocMaster hover your mouse on “Solutions” which can be found on the top ribbon of the dashboard. This brings up a drop-down menu.

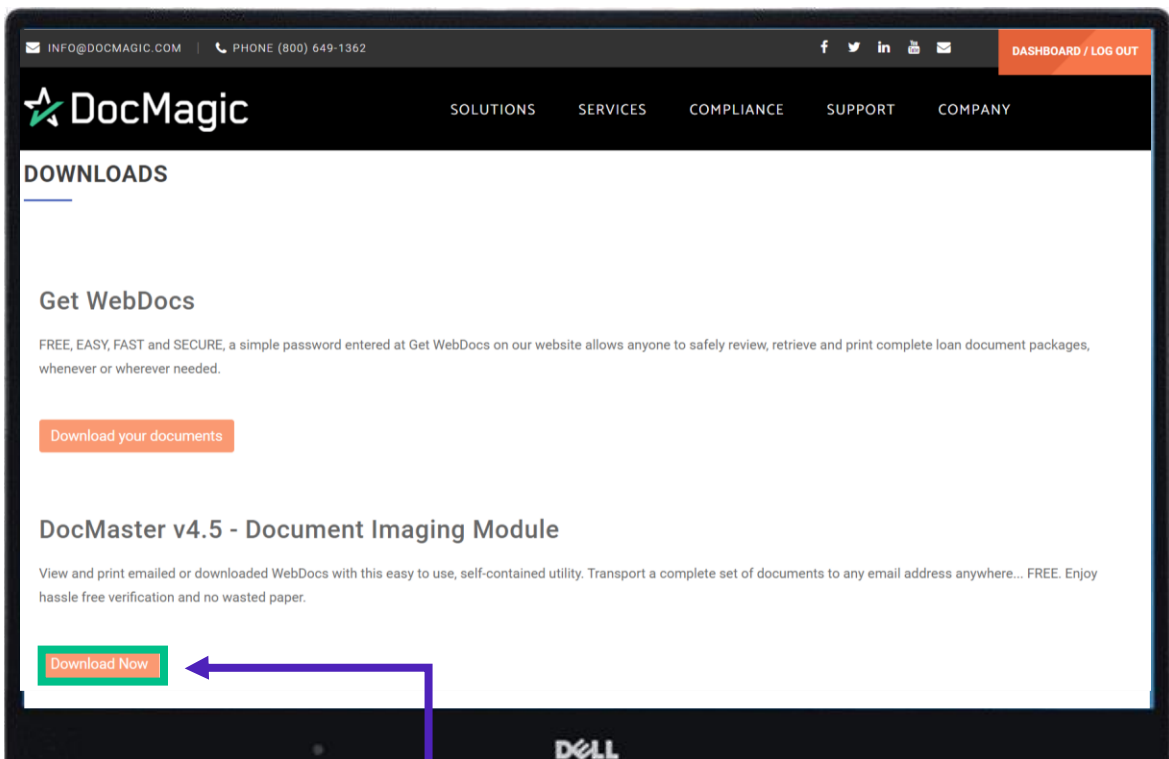


Click “Downloads”.



DocMaster

Downloading and Installing DocMaster



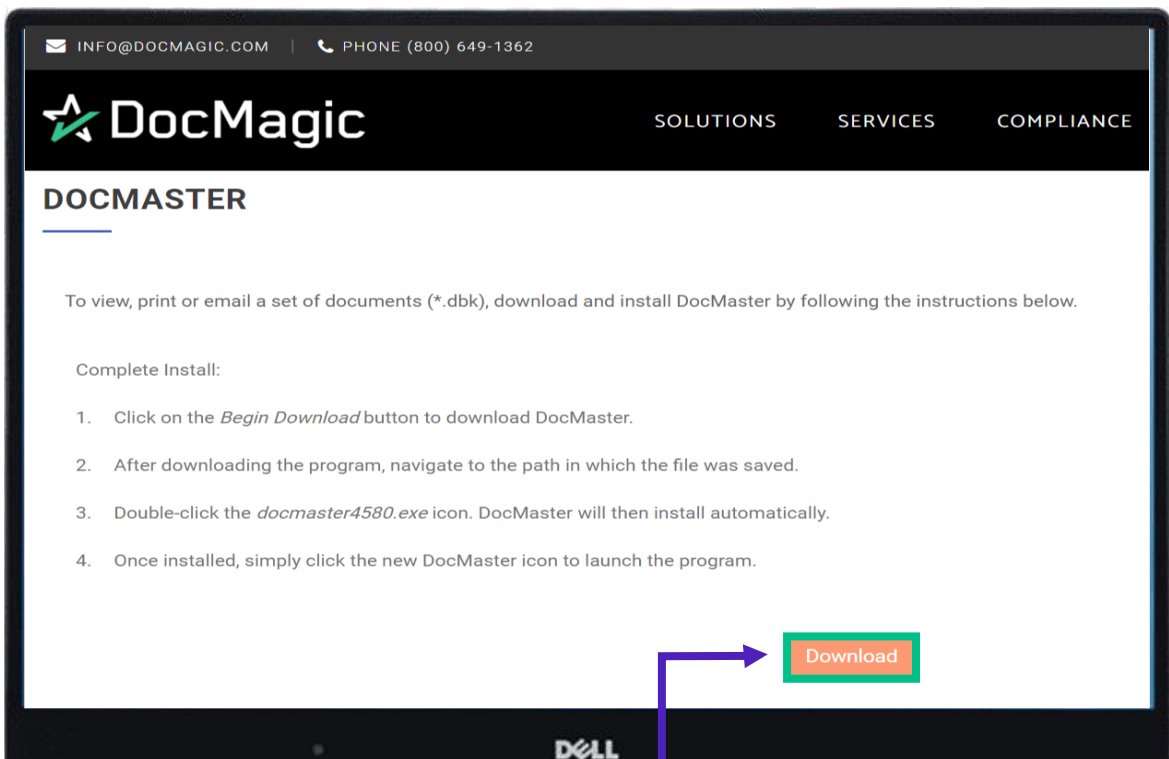
Click "Download Now".



DocMaster

Downloading and Installing DocMaster

Follow the instructions
on this page.



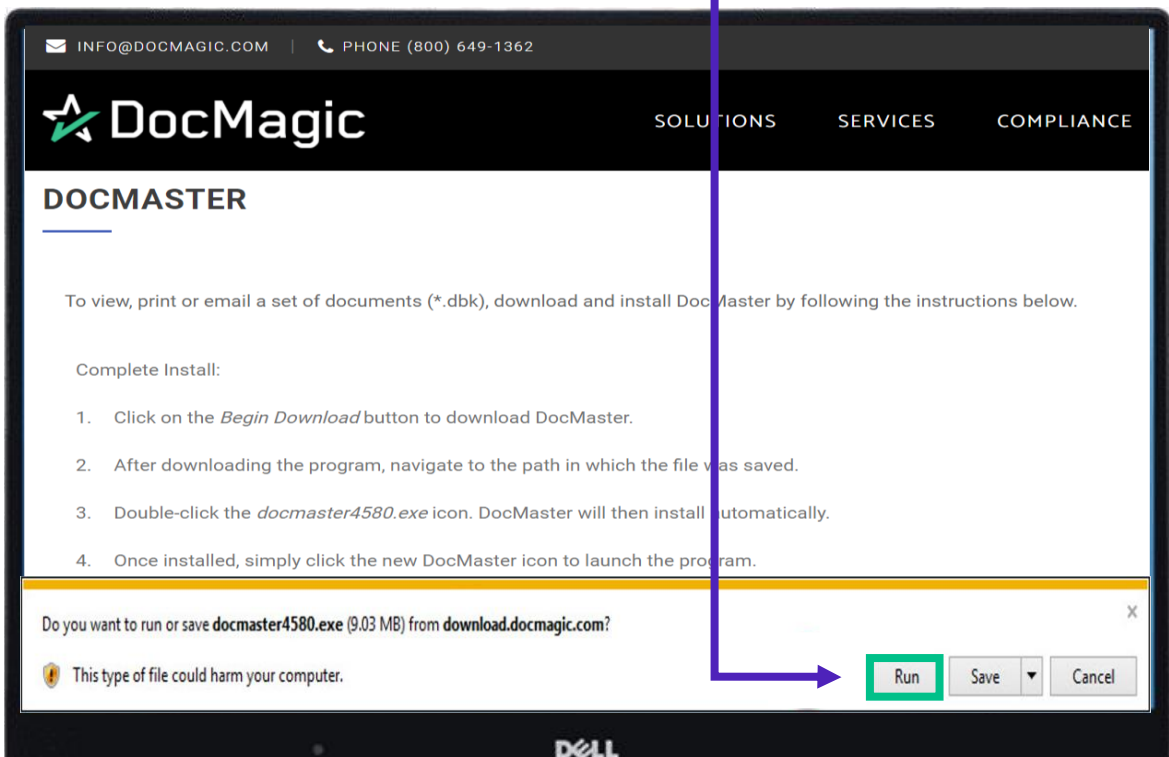
Click "Download".



DocMaster

Downloading and Installing DocMaster

Sometimes a security warning or banner may appear during the installation. If so, click "Run".



DocMaster is safe and will not harm your computer.



DocMaster

Downloading and Installing DocMaster

Go to the location where the file is saved.

The screenshot shows the DocMagic website interface. At the top, there is a navigation bar with the DocMagic logo and links for SOLUTIONS, SERVICES, and COMPLIANCE. Below the navigation bar, the page title "DOCMASTER" is displayed. The main content area contains a "Complete Install:" section with a list of steps. A Windows File Explorer window is overlaid on the page, showing the path "This PC > OS (C:) > Users > Aland > Downloads". The file "docmaster4580.exe" is selected in the file list. A purple arrow points from the text box above to the file name, and another purple arrow points from the text box below to the same file name.

To view, print or email a set of documents

Complete Install:

1. Click on the *Begin Download*
2. After downloading the program
3. Double-click the *docmaster*
4. Once installed, simply click

Download

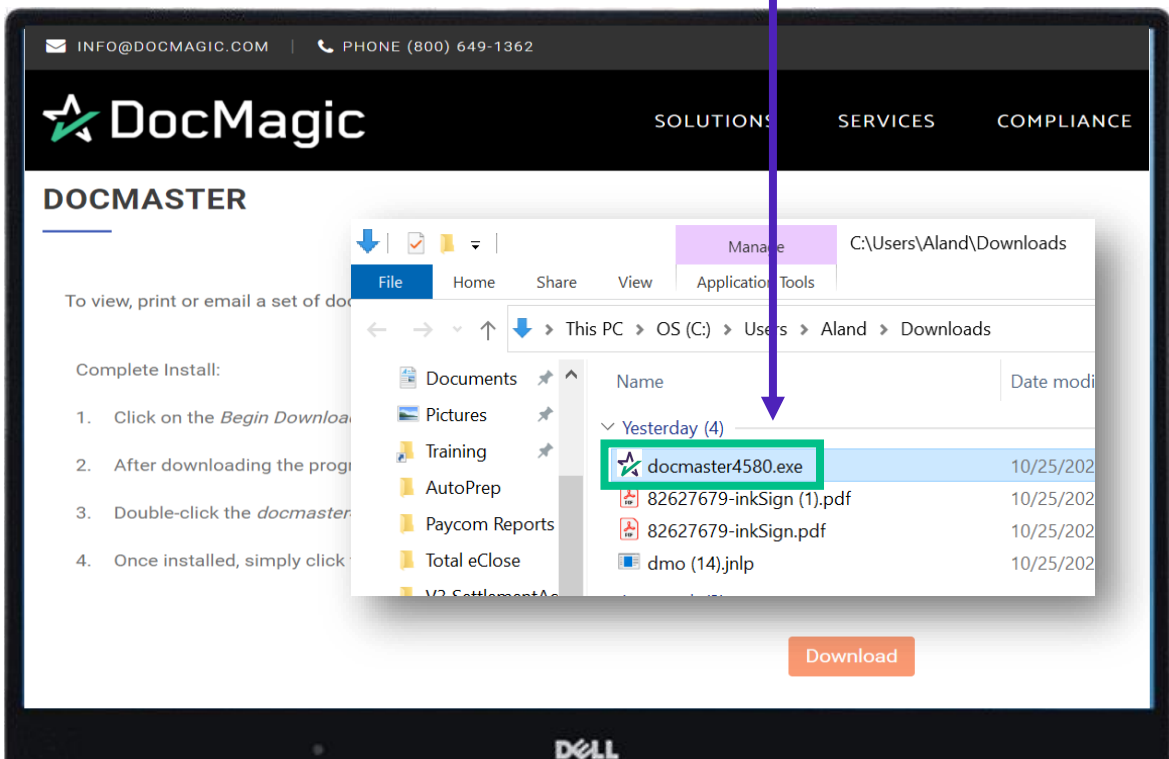
This is usually found in the Downloads folder.



DocMaster

Downloading and Installing DocMaster

Double-click the *docmaster4580.exe* file. DocMaster will then install automatically.



DocMaster

Downloading and Installing DocMaster

The installation wizard will appear the first time you launch DocMaster.



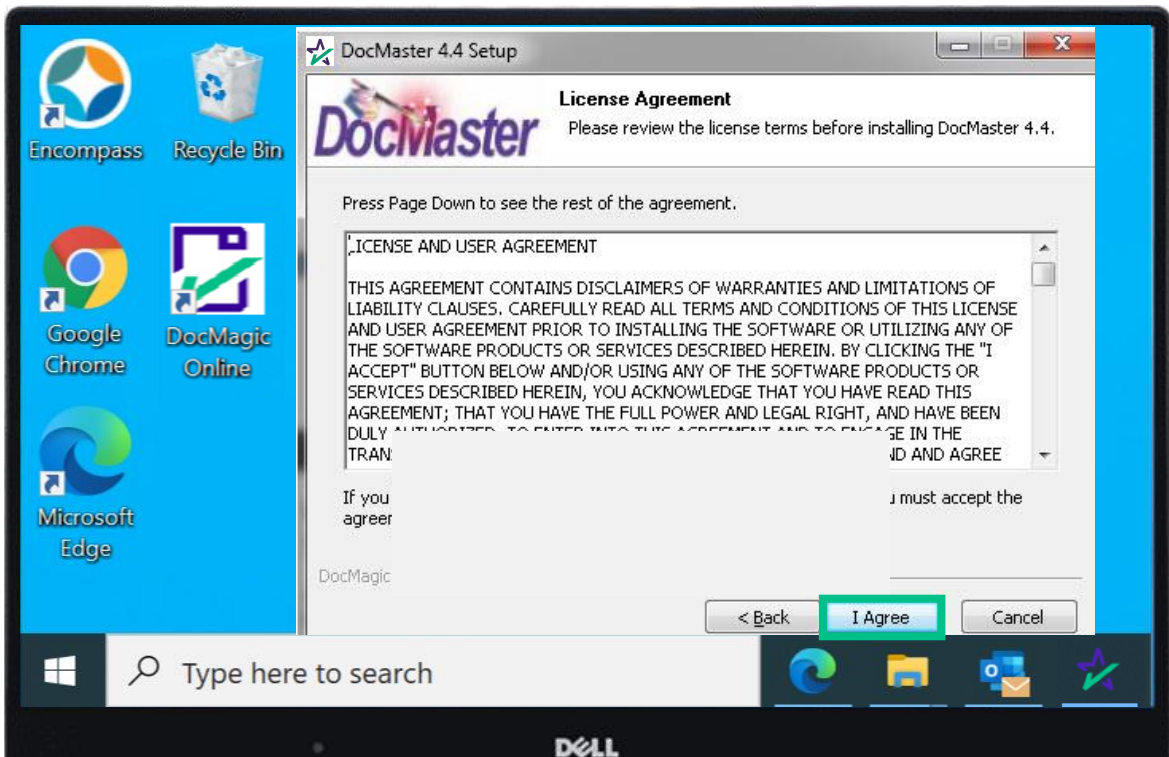
Click "Next".



DocMaster

Downloading and Installing DocMaster

The End User License Agreement (EULA) will appear.



Click "I Agree".



DocMaster

Downloading and Installing DocMaster

DocMaster will now be installed on your computer.



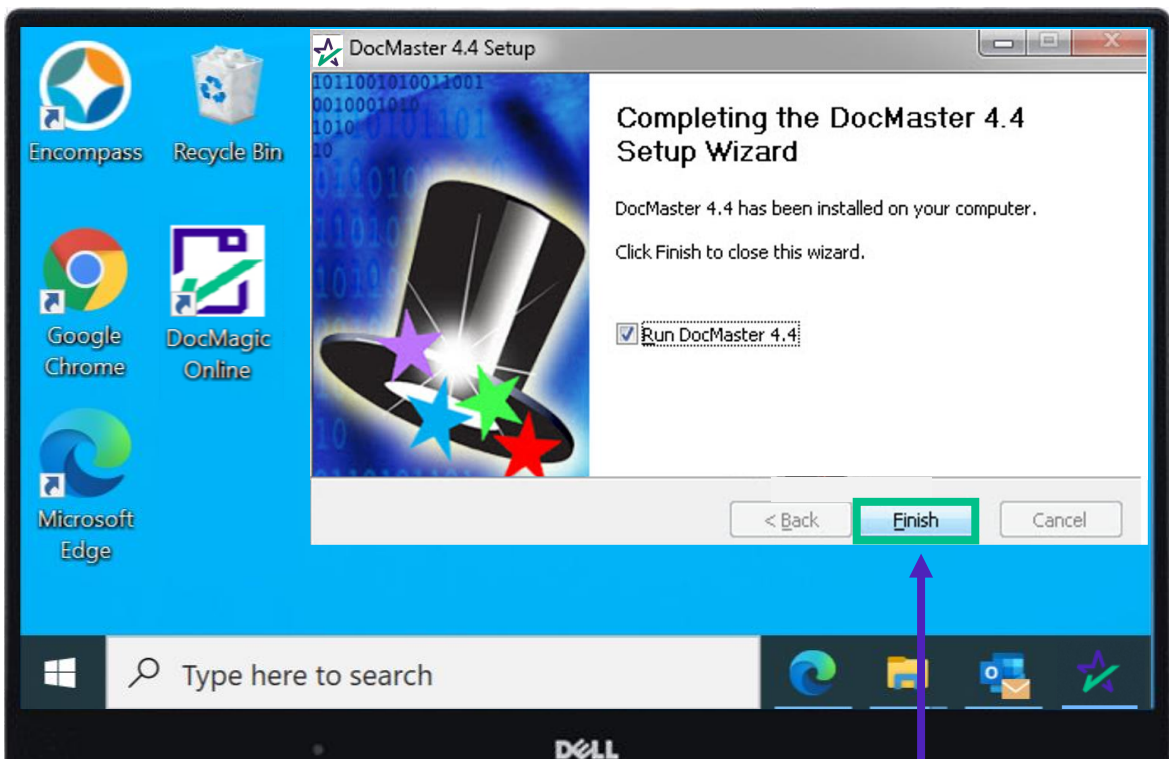
Once the green bar fills up, you will be able to click "Next" to advance.



DocMaster

Downloading and Installing DocMaster

DocMaster is now installed.



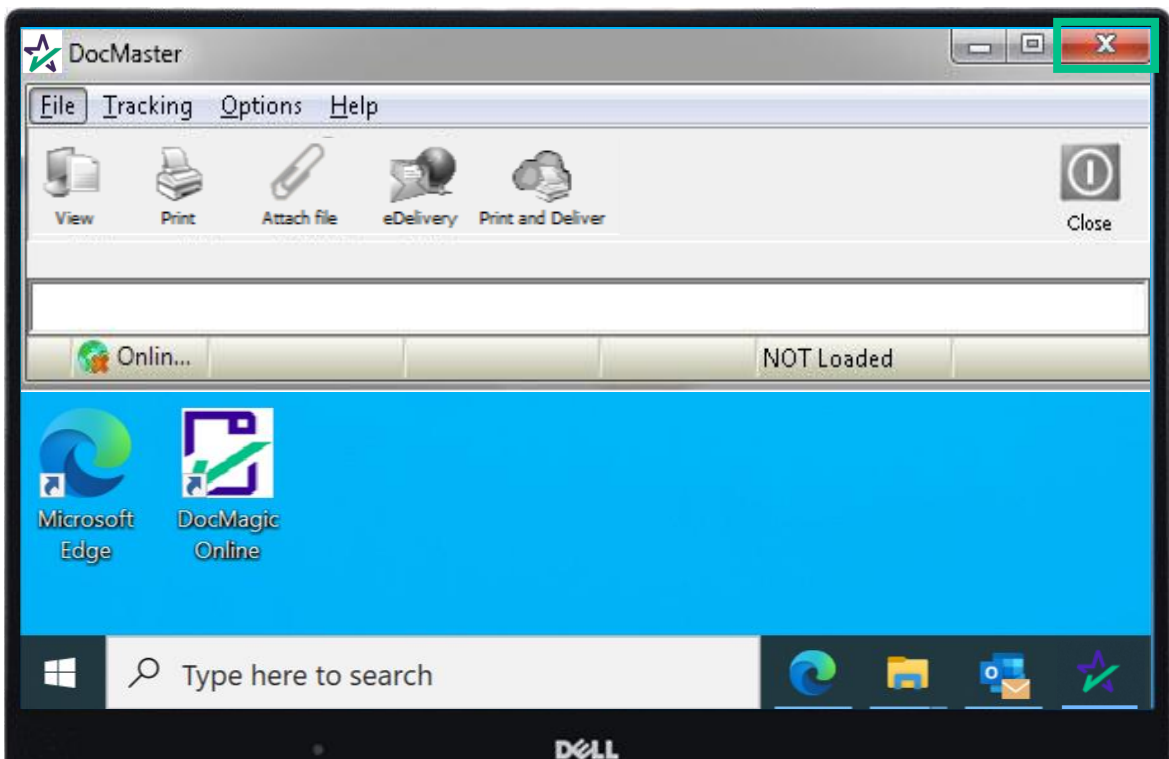
Click finished.



DocMaster

Downloading and Installing DocMaster

If the DocMaster toolbar appears after the installation process is completed, close it.



DocMaster

Processing a Set of Documents

To view your document package in DocMaster, you will first need to process a set of documents in DocMagic Online.

The screenshot displays the DocMagic software interface. The top navigation bar includes 'SOLUTIONS', 'SERVICES', 'COMPLIANCE', 'SUPPORT', and 'COMPANY'. The main window title is 'DocMagic - Borrower One Sample (#21)'. The interface is divided into several sections:

- General Information:** Loan Stage (CLOSING), Loan Program (ALL FIXED LOANS (DSI_CONV)), Alternate Lender, Transfer To, Broker Name (BROKER NAME), Channel, Origination, Loan Rep (LOAN REP), Branch (BRANCH), Loan Type (CONVENTIONAL), Business Use (checkbox), Loan Purpose (PURCHASE), Same Lender (checkbox), Type, Program, Lien Position, Simultaneous? (checkbox), Loan Number (LOANNUMBER), MERS #, MIC / Agency #, Section, Case # Assigned, and Loan Identifiers.
- Dates & Times:** Application Date (03/01/2016), Pre-Z Send Date (03/02/2016), Estimate Issue Date (03/02/2016), Est. Available Through (03/06/2016, 12:00 AM, PT), Intent to Proceed Date (03/08/2016), Rate Lock Date (03/10/2016, 3 Days), Rate Available Thru (03/15/2016, 12:00 AM, PT), Lock Days Prior to Close (25, Last Disc. APR 3.750%), CD/Re-disc Date/Method, CD/Re-disc Rec'd Date, Document Date (04/05/2016), Closing Date (05/05/2016), Signing Date, Cancel Date, and Disbursement Date (05/10/2016).

The interface also features a menu bar (File, Edit, Services, Tools, Help) and a toolbar with various icons for actions like Open, Save, New, Copy, Import, Audit, Details, APR, Sec32, Impound, Process, View, Generate, Email, Appraisal, UCD, Collaboration, eSign, and LoanMagic Portal.

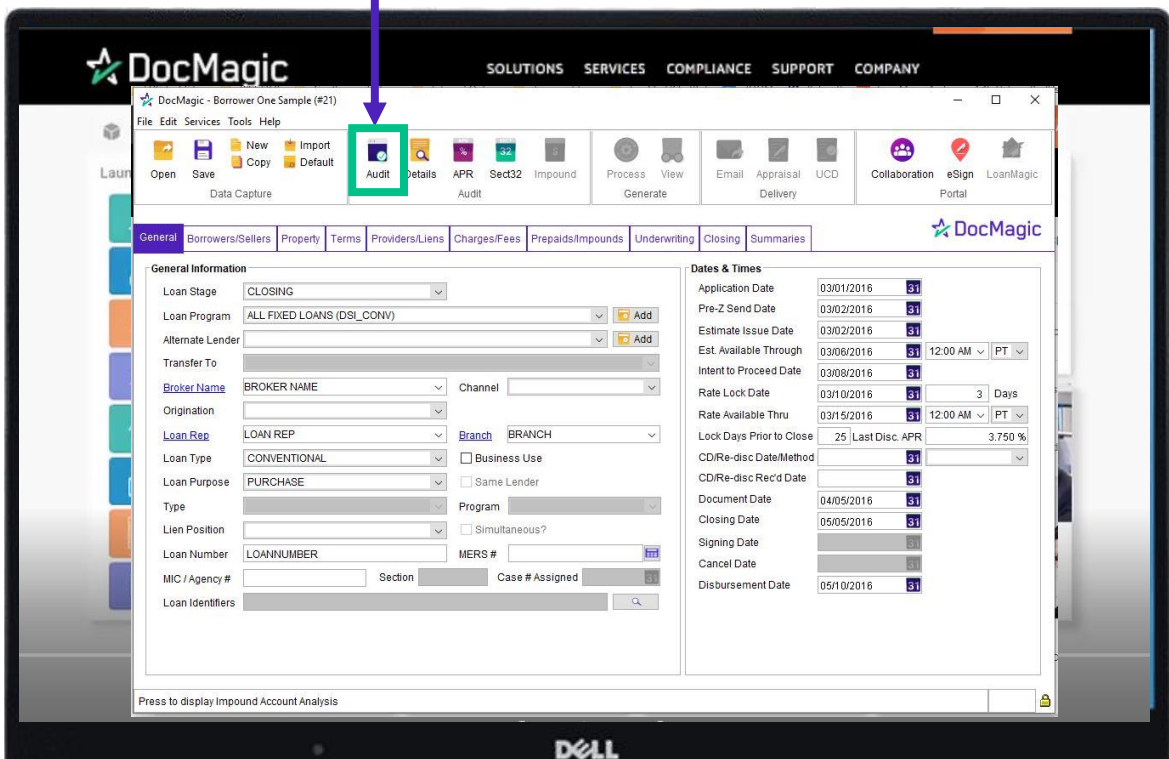
If you are unsure about DocMagic Online, please consult the DMO workbook.



DocMaster

Processing a Set of Documents

Enter all relevant information in DMO then click audit.



DocMaster

Processing a Set of Documents

Click process.

The screenshot shows the 'Data Validation - Worksheet #1' window in the DocMagic application. The 'Process' button in the top toolbar is highlighted with a green box. A message box indicates that 8 warning issues have been detected. The main area contains a table of these warnings, with columns for Type, Message, and Category. A 'Go To Selected Audit' button is visible at the bottom of the table.

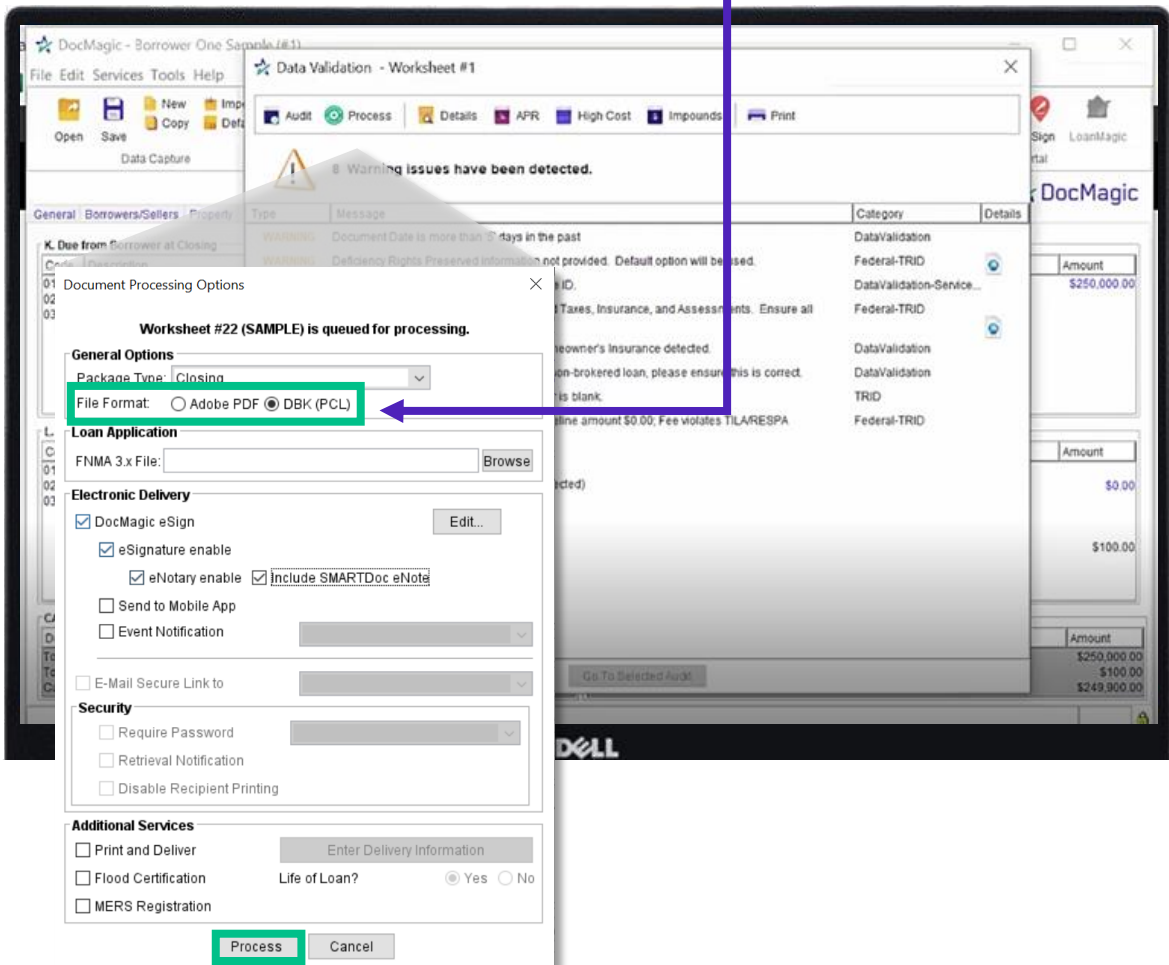
Type	Message	Category
WARNING	Document Date is more than 5 days in the past	DataValidation
WARNING	Deficiency Rights Preserved information not provided. Default option will be used.	Federal-TRID
WARNING	Settlement Agent is missing Email, License ID.	DataValidation-Service...
WARNING	Only escrowed items included in Estimated Taxes, Insurance, and Assessments. Ensure all mortgage-related obligations are entered.	Federal-TRID
WARNING	Purchase Transaction with no prepaid Homeowner's Insurance detected.	DataValidation
WARNING	You have entered Broker Information on a non-brokered loan, please ensure this is correct.	DataValidation
WARNING	Intent to service or transfer service indicator is blank.	TRID
WARNING	Transfer Taxes (TSF) \$35.00 exceeds baseline amount \$0.00; Fee violates TILARESPA Tolerance.	Federal-TRID
MESSAGE	Worksheet Saved	
MESSAGE	Worksheet Audited (outstanding audits detected)	



DocMaster

Processing a Set of Documents

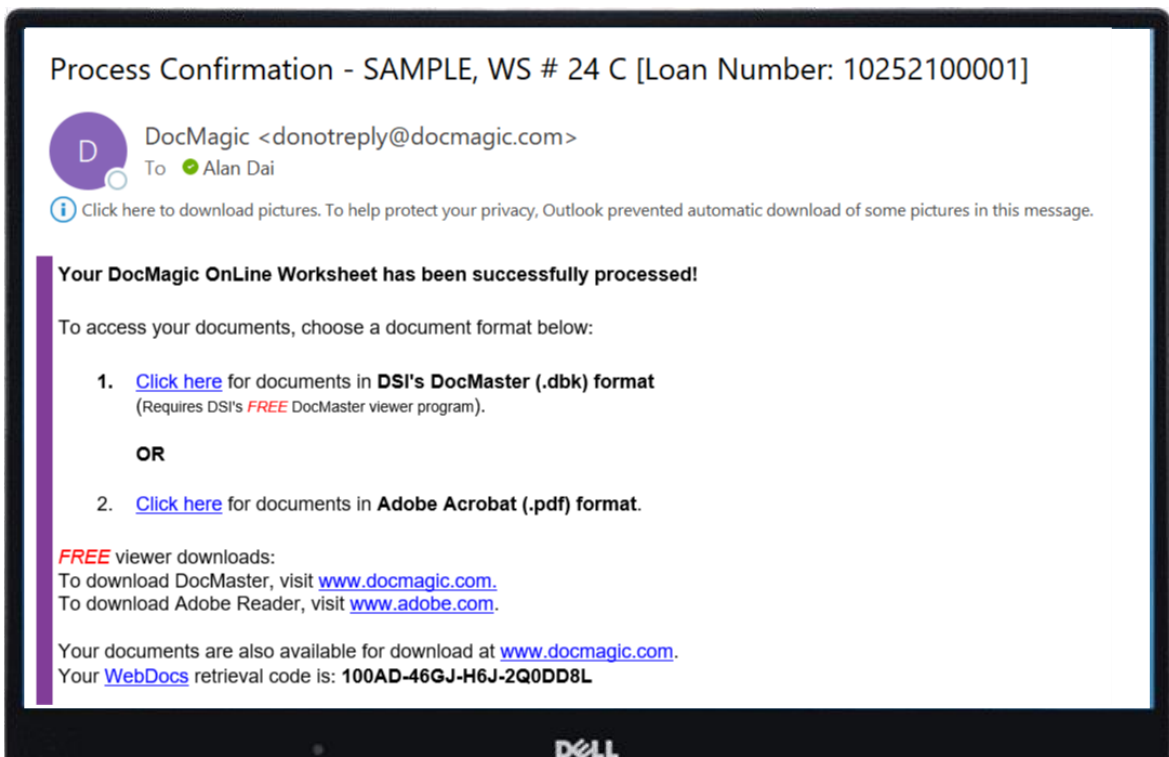
Select "DBK (PCL)" under File Format.



DocMaster

Opening a DBK File With DocMaster

You can view the package in DocMaster by accessing the process confirmation e-mail.



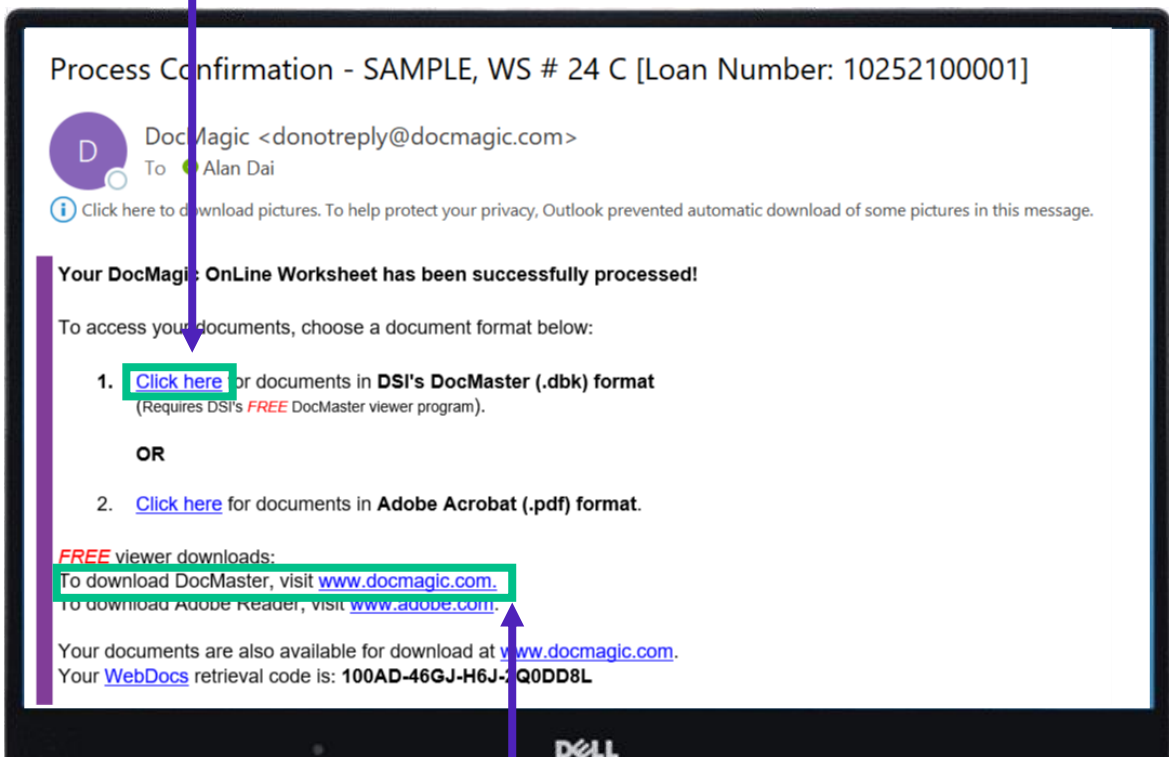
Some loan origination software include a DBK viewing option.



DocMaster

Opening a DBK File With DocMaster

Clicking the first option in the Process Confirmation Email will allow you to view the documents in DocMaster.



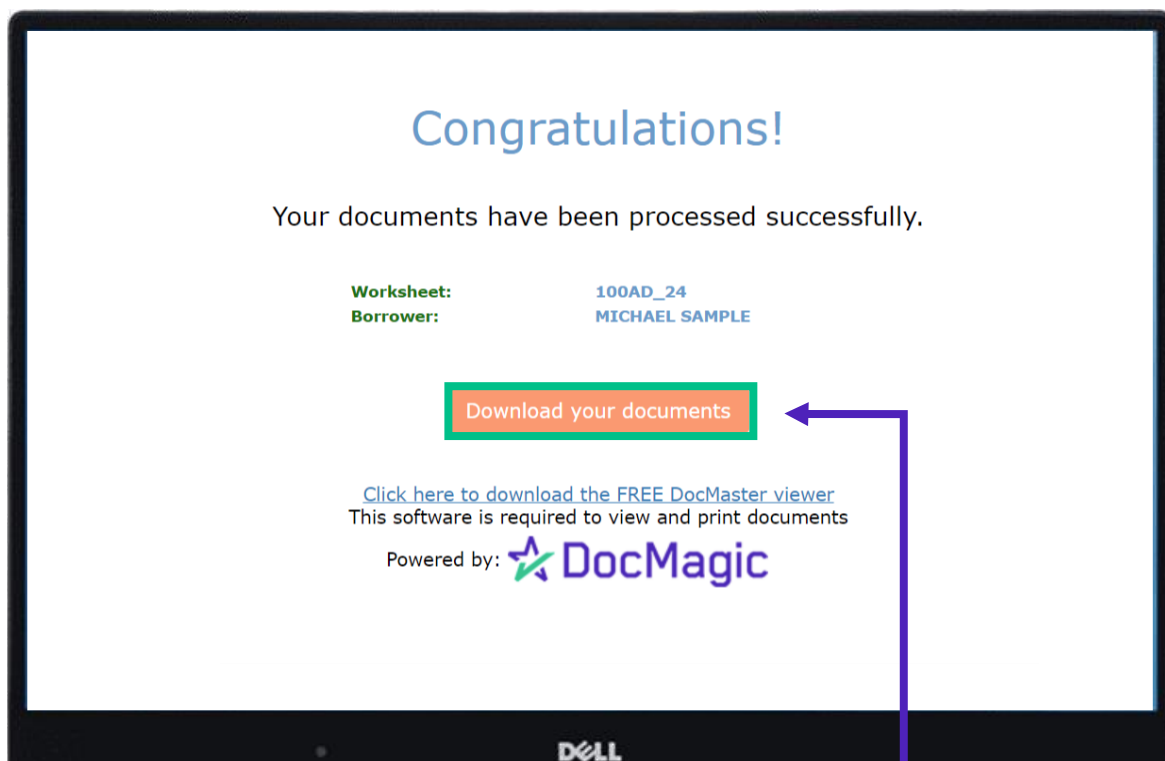
There is also the opportunity to download DocMaster from the confirmation e-mail.



DocMaster

Opening a DBK File With DocMaster

Clicking on the first option in the Process Confirmation Email opens this message in your browser.



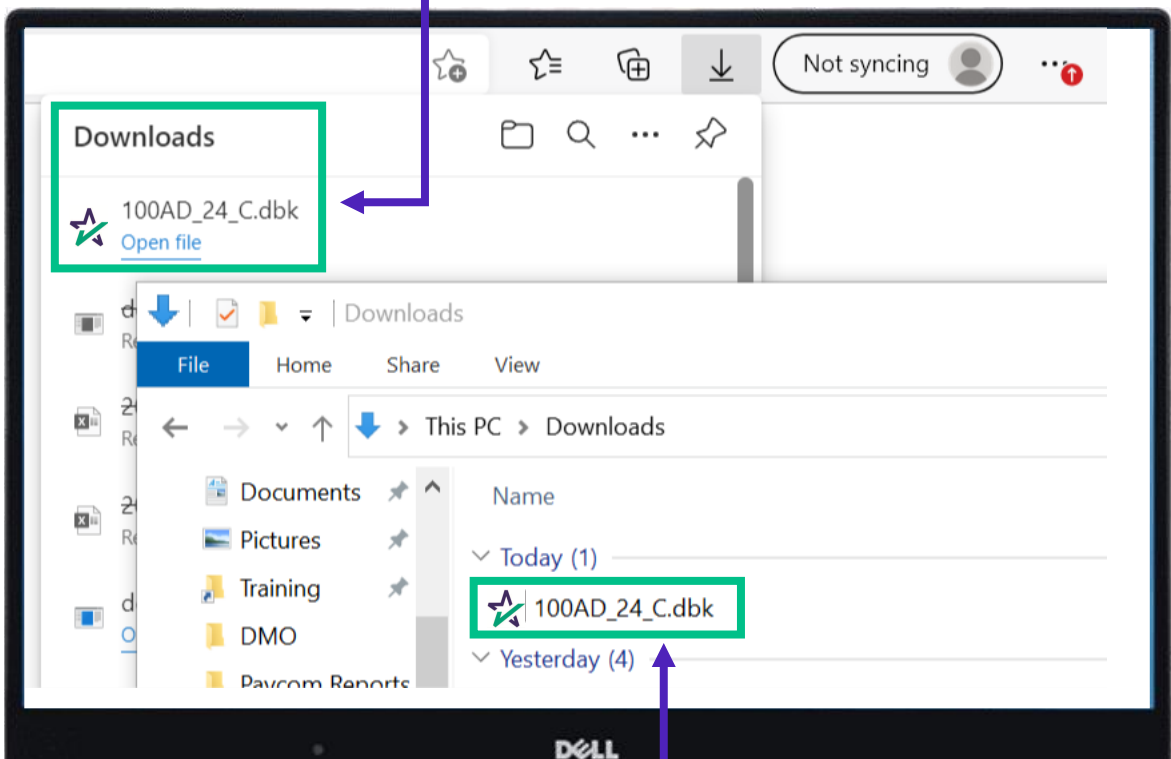
You can download your documents here.



DocMaster

Opening a DBK File With DocMaster

A DBK file will be downloaded.



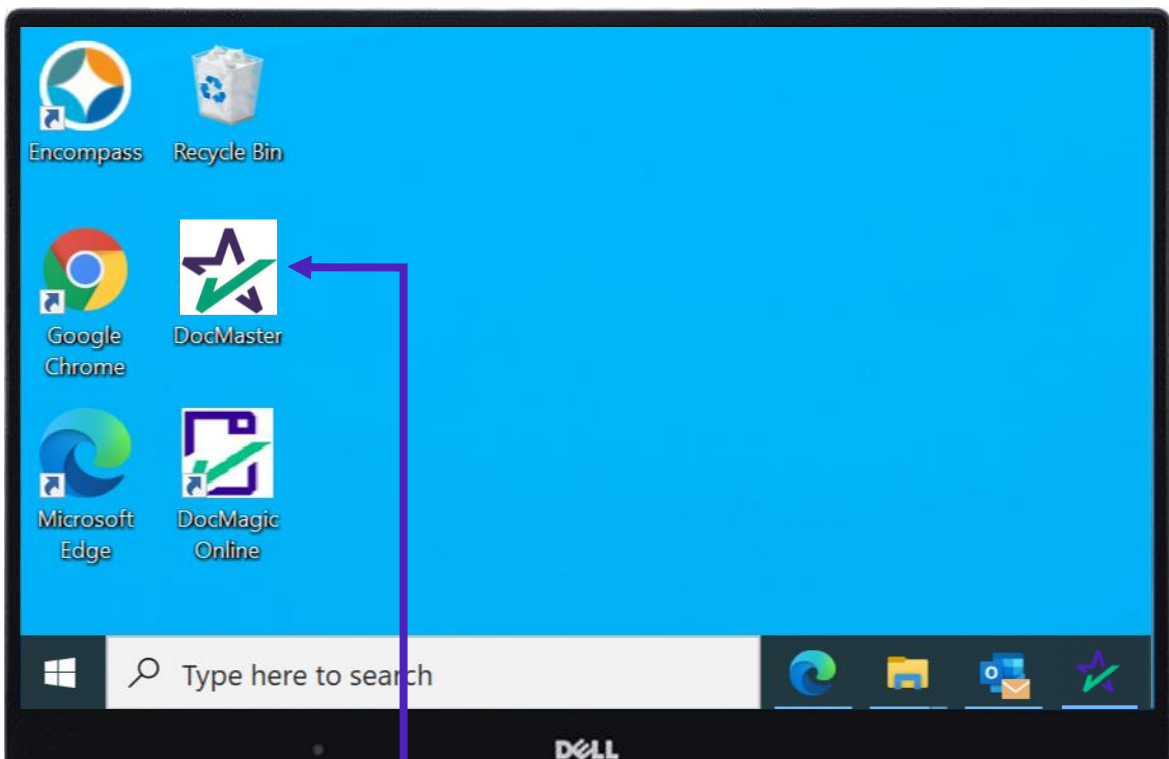
Double-click the DBK file to open it in DocMaster.



DocMaster

Opening a DBK File With DocMaster

You can also open DocMaster without opening a DBK file.



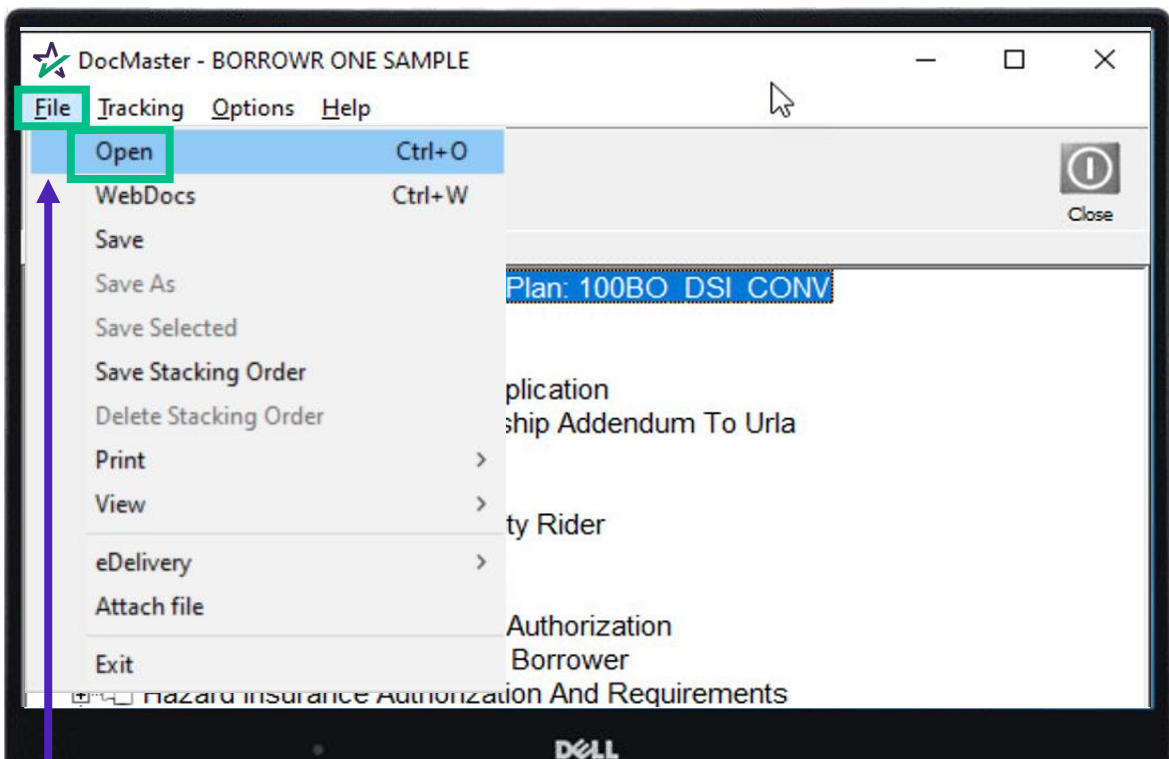
Click on the DocMaster icon to launch the program.



DocMaster

Opening a DBK File With DocMaster

With DocMaster running, you may open any DBK files saved to your computer.



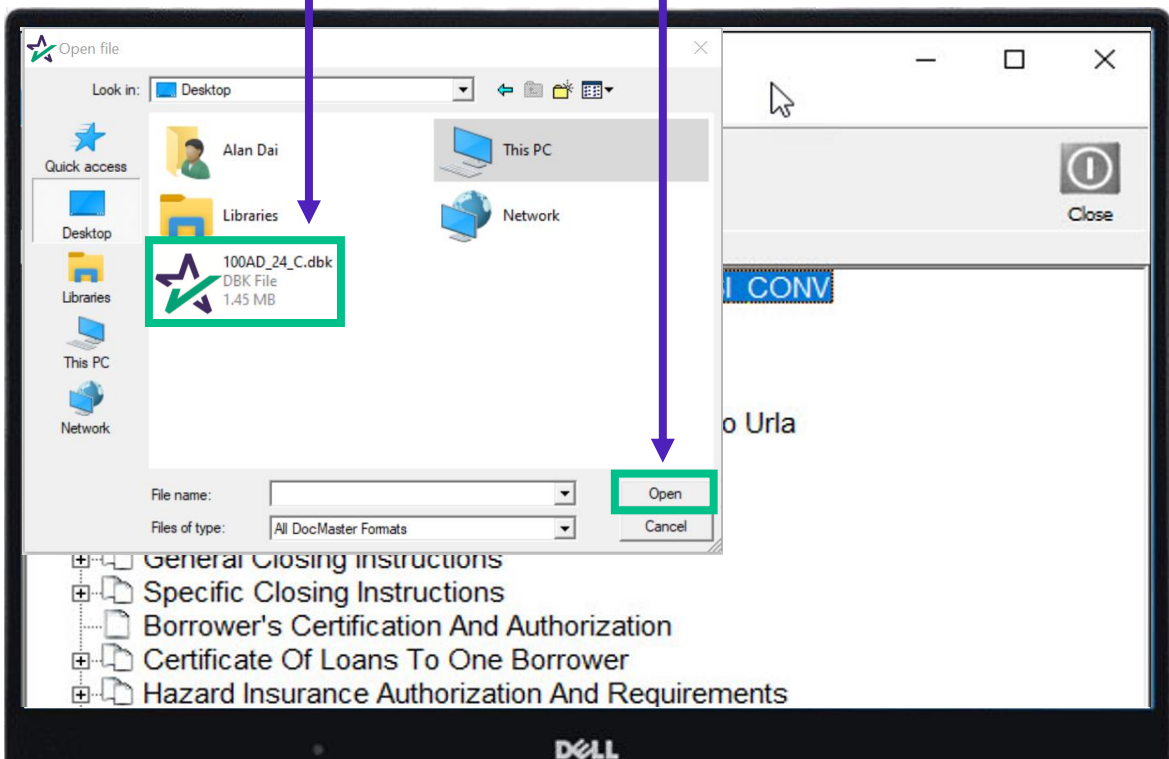
From DocMaster, click "File", then "Open".



DocMaster

Opening a DBK File With DocMaster

Navigate to the location of the DBK file on your computer, click on the file, then "Open".



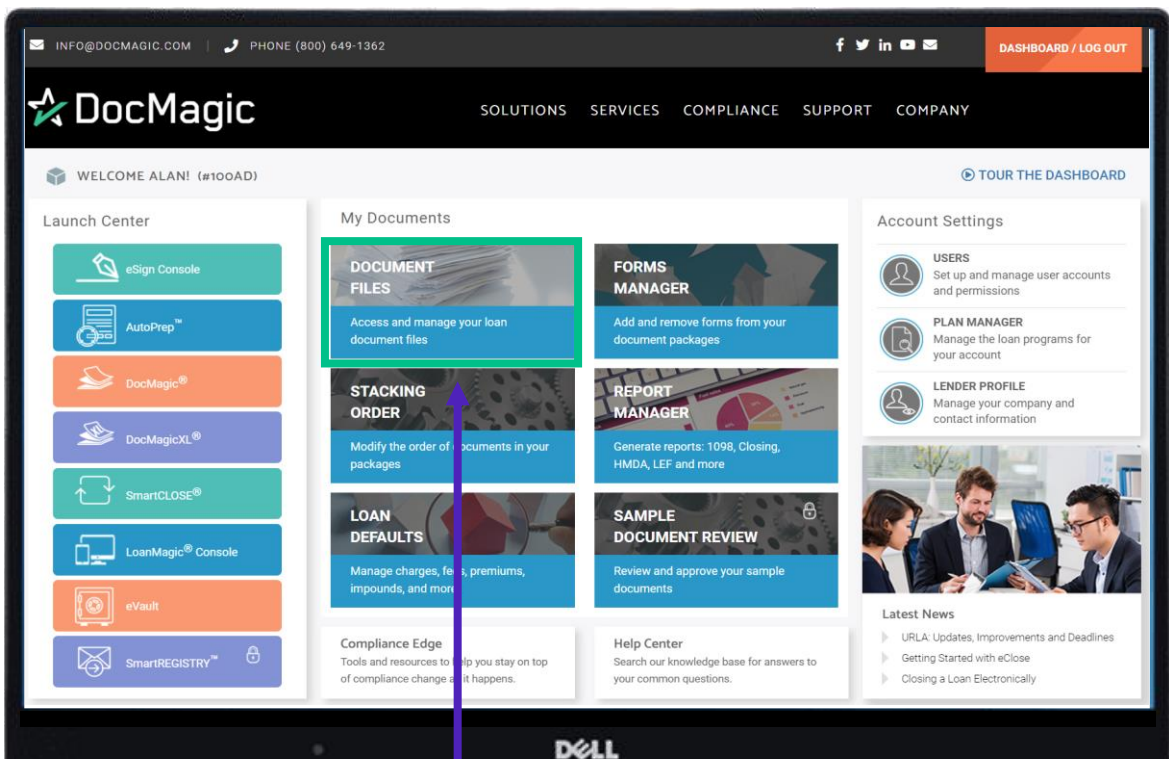
DBK files received via e-mail should be saved to your computer and opened using this method.



Document Files

Opening a DBK File from the Website

You can also DBK files from DocMagic's website.



Click Document Files from the Dashboard to get started.



Document Files



















Opening a DBK File from the Website

The DocMaster button allows you to review documents, send them as e-disclosures, and as secure email closing documents.

DocMagic SOLUTIONS SERVICES COMPLIANCE SUPPORT COMPANY DASHBOARD

Document Files
(since Wednesday, September 29, 2021)

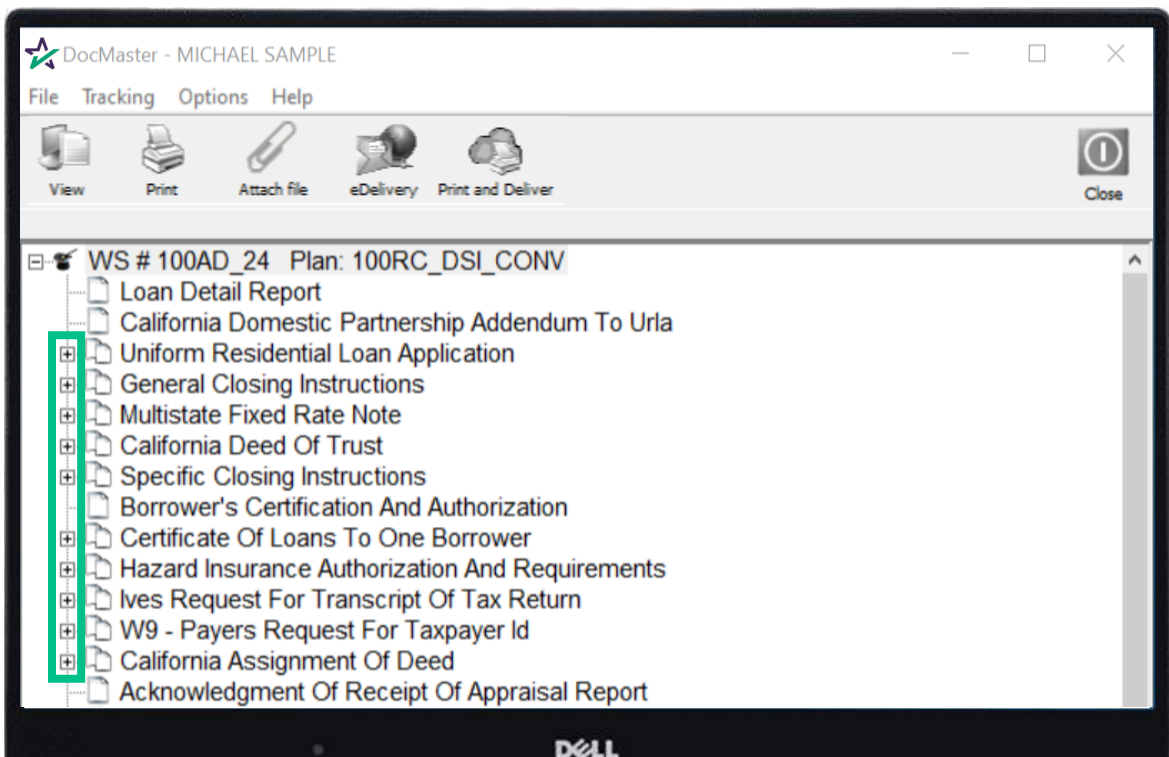
Show 10 entries Search:

WORKSHEET #	LOAN #	BORROWER	MODIFIED	TYPE	ACTION
1	100420210001	NED NEEDS NOTARY SAMPLE	03-18-2022 4:13:56 PM	IntegratedDisclosure (Selected)	  
1	100420210001	NED NEEDS NOTARY SAMPLE	03-17-2022 2:20:38 PM	IntegratedDisclosure (Selected)	  
10	202110010002	BILLY BORROWER SAMPLE	10-01-2021 3:51:18 PM	Closing	  
11	202110010003	BILLY BORROWER SAMPLE	10-01-2021 3:52:05 PM	Closing	  
12	202110010004	BILLY BORROWER SAMPLE	10-01-2021 3:55:30 PM	Closing	  
13	202110010005	BILLY BORROWER SAMPLE	11-11-2021 2:34:53 PM	Closing	  

DELL



Double click on a form to open it.



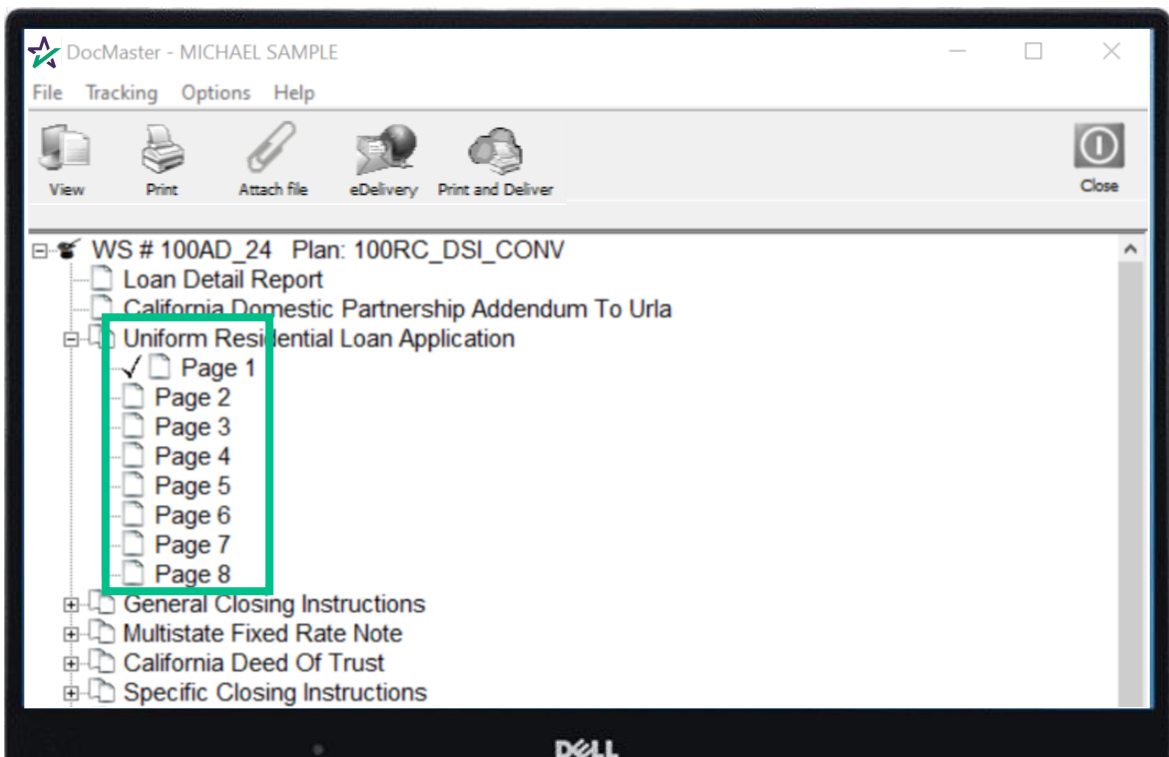
The "+" to the left of the form indicates there's more than one page to the form.



DocMaster

Form Access

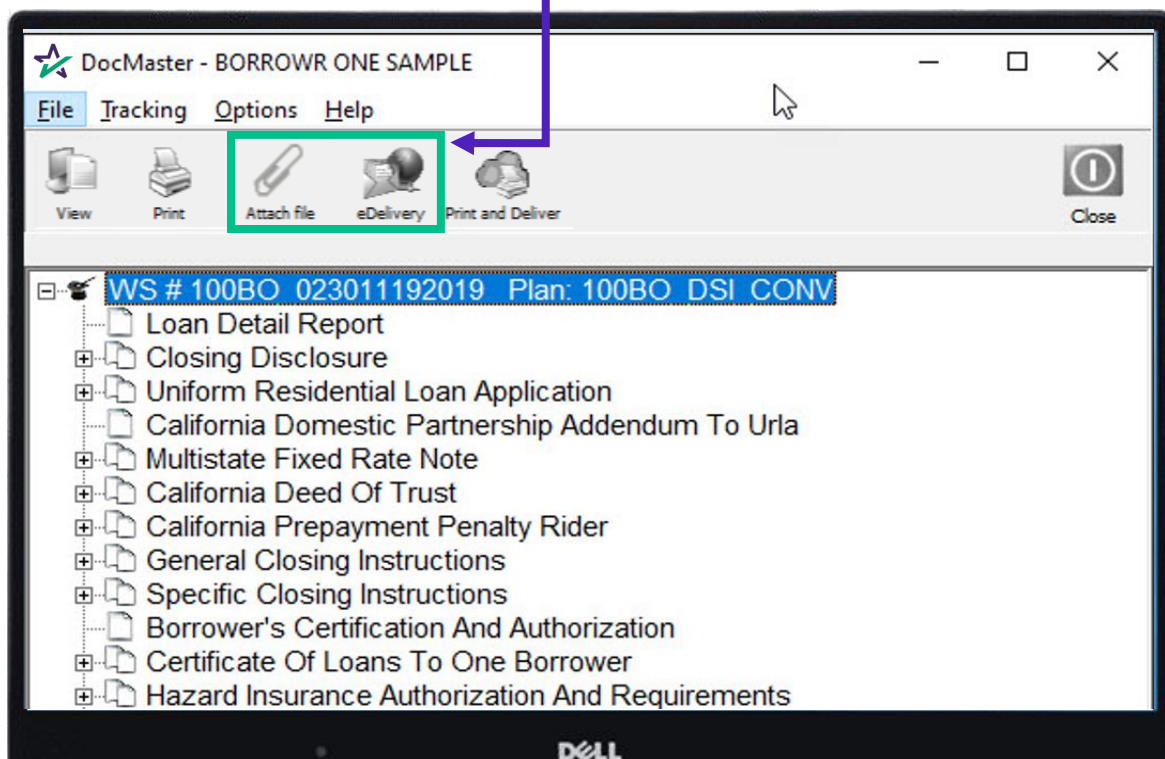
Clicking on the "+" will reveal the number of pages and allow you to click on a specific page you want to open.



DocMaster

Authentication

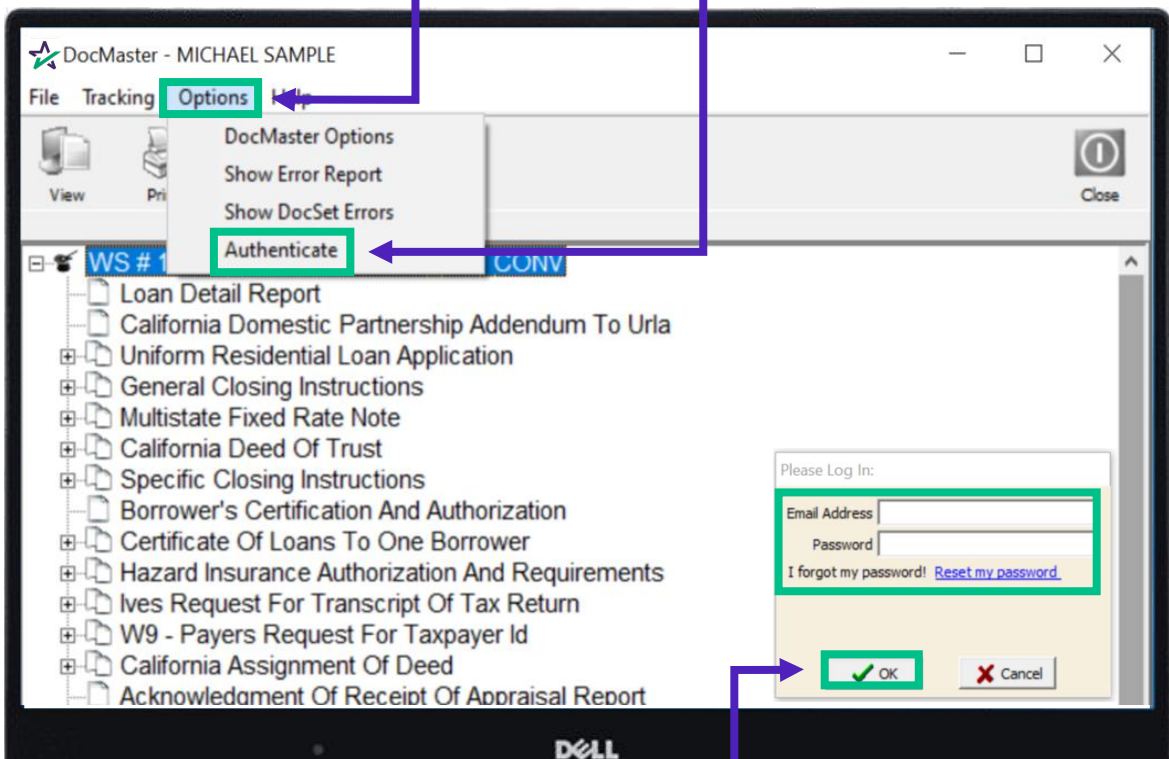
If the "Attach File" and "eDelivery" buttons are grayed out, you will need to log into DocMaster with your DocMagic credentials.



DocMaster

Authentication

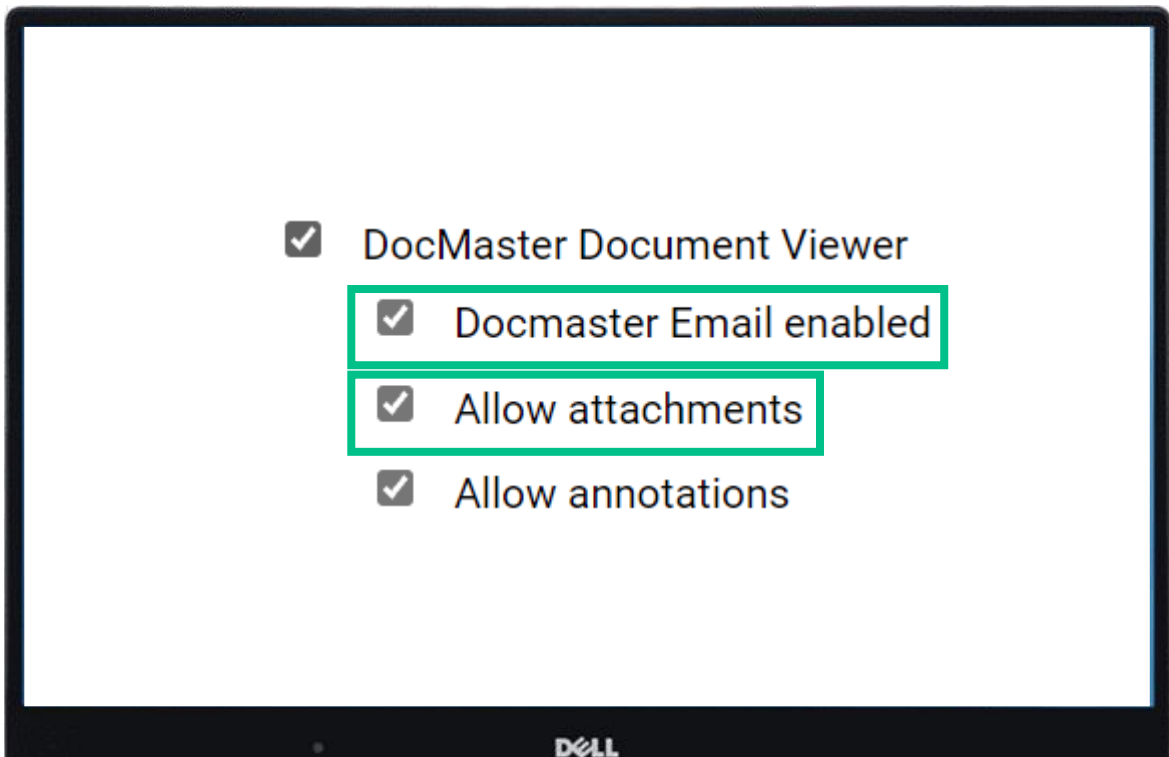
Click "Options", then "Authenticate".



Enter your DocMagic credentials then click OK.



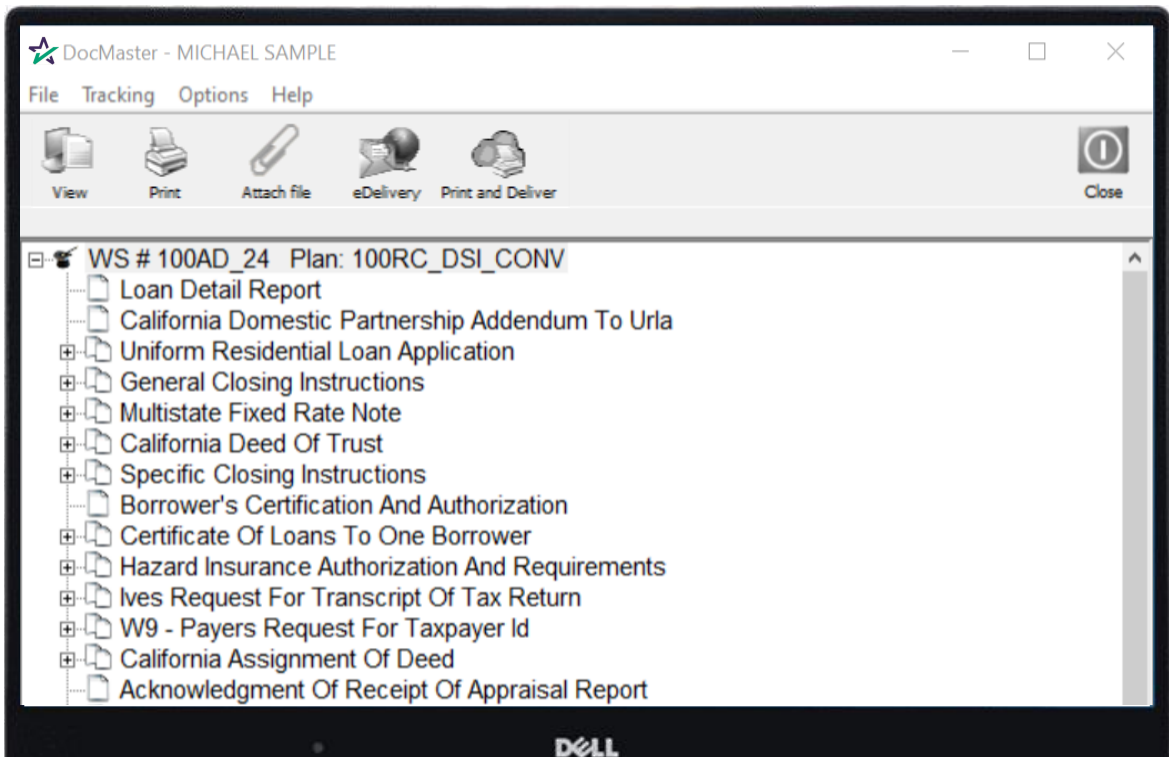
In order to Attach Files and use eDelivery, users must have the following privileges checked on DocMagic.com .



DocMaster

Black vs. Red font

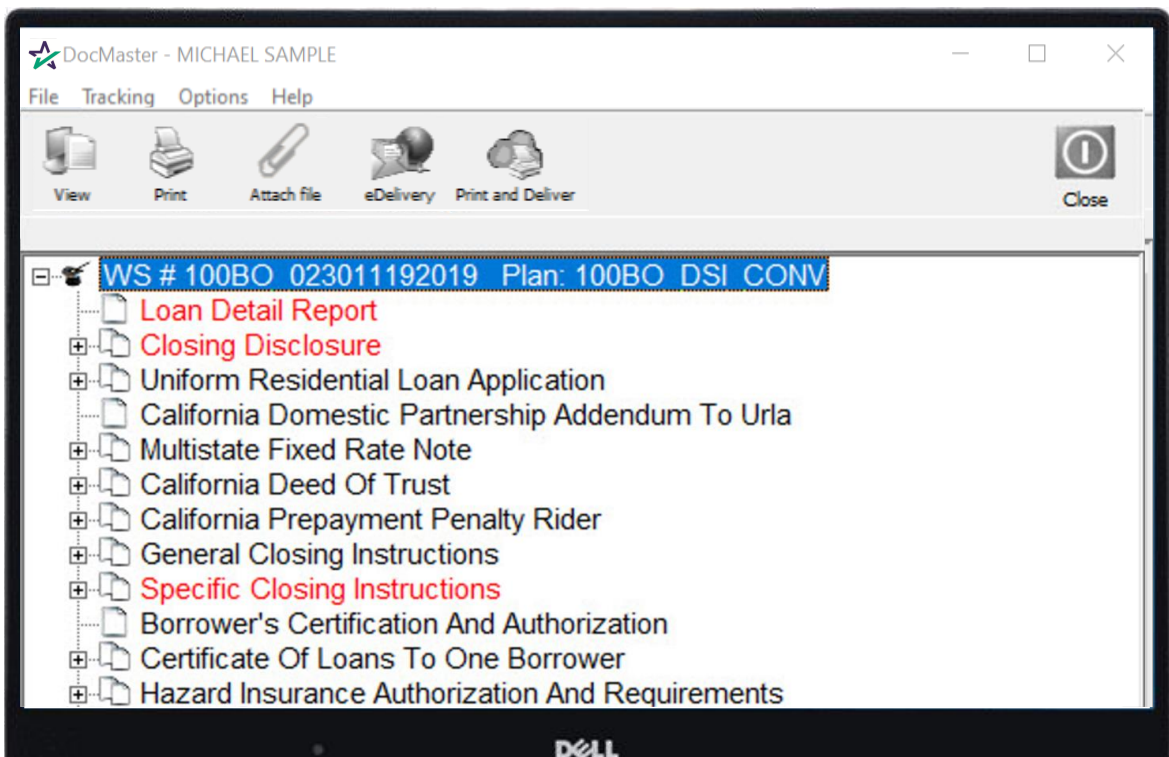
When you first process a package and view the documents in DocMaster (DBK format), all fonts will be black.



DocMaster

Black vs. Red font

If changes are made to the package and it is reprocessed, the titles of the forms affected by the new data will appear in red.



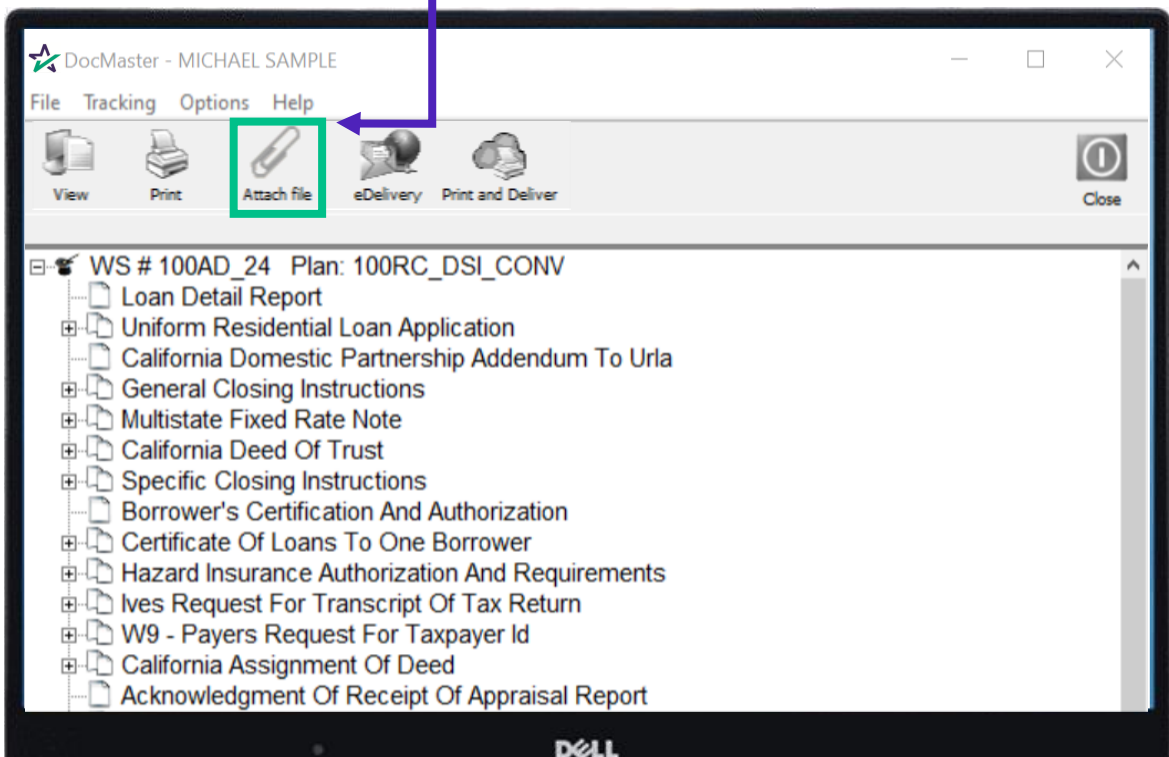
The red allows customers to easily identify and print the affected documents.



DocMaster

How to Attach a File

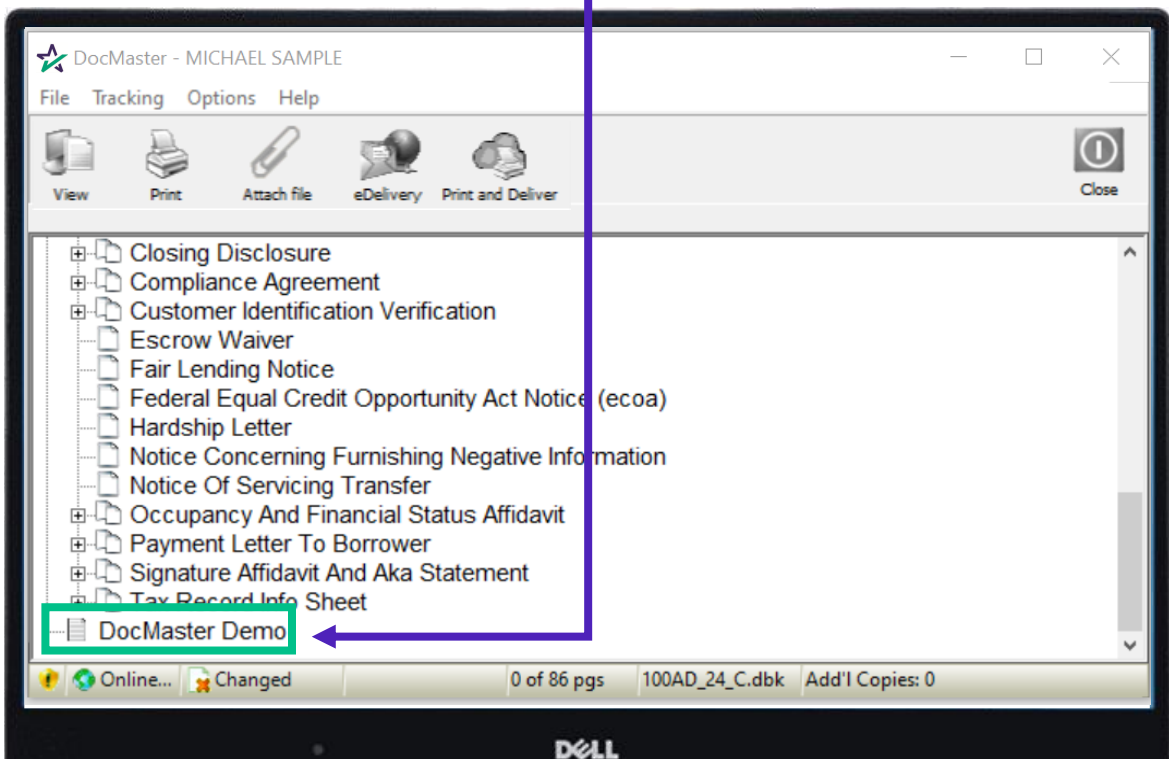
You can attach a file by clicking on the Attach file icon.



DocMaster

How to Attach a File

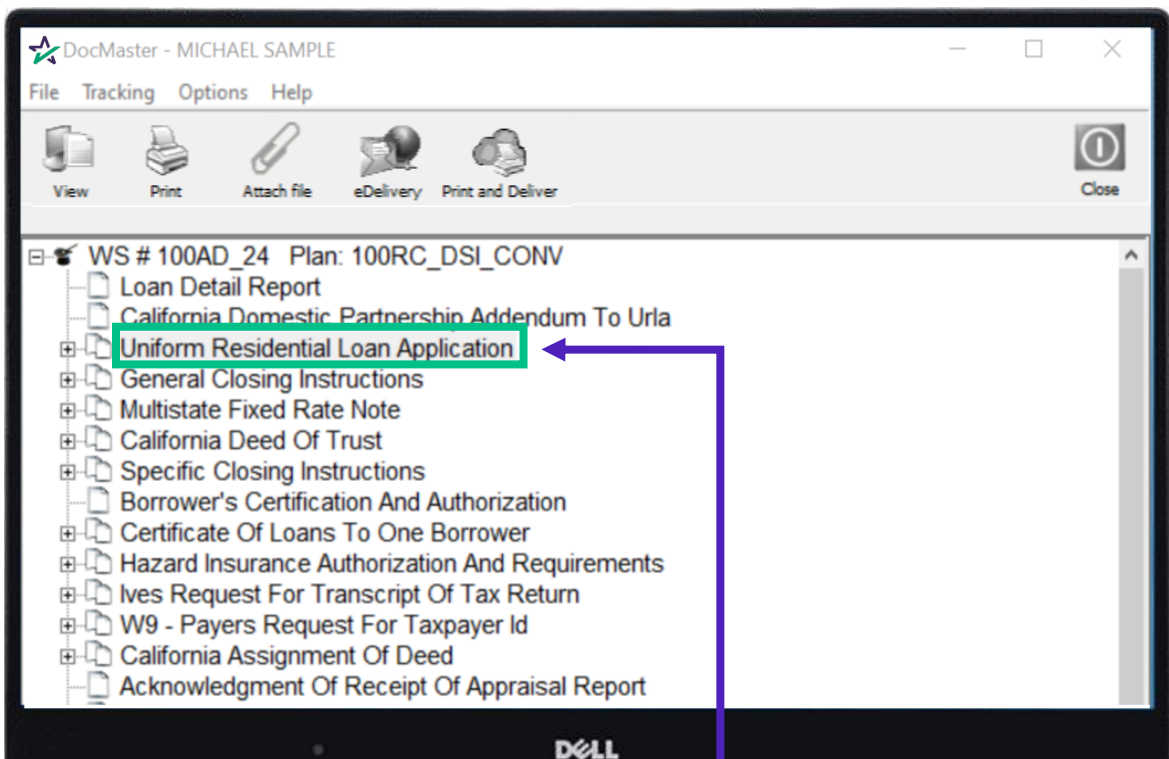
Newly attached forms will appear at the bottom of the list.



DocMaster

Annotation & Adding Text

DocMaster has an annotation feature to add text or data where there is no designated field.



Start by opening the form that needs data added.



Click "Zoom In" if necessary, then click "Add Text".

1003.ltr.xml: Uniform Residential Loan Application, MICHAEL SAMPLE, Page 1 of 8

File View Help

Print Zoom In Zoom Out Add Text Del Text Save

Uniform Residential Loan Application

This application is designed to be completed by the applicant(s) with the Lender's assistance. Applicants should complete this form as "Borrower" or "Co-Borrower" as applicable. Co-Borrower information must also be provided (and the appropriate box checked) when the income or assets of a person other than the Borrower (including the Borrower's spouse) will be used as a basis for loan qualification or the income or assets of the Borrower's spouse or other person who has community property rights pursuant to state law will not be used as a basis for loan qualification, but his or her liabilities must be considered because the spouse or other person has community property rights pursuant to applicable law and Borrower resides in a community property state, the security property is located in a community property state, or the Borrower is relying on other property located in a community property state as a basis for repayment of the loan.

If this is an application for joint credit, Borrower and Co-Borrower each agree that we intend to apply for joint credit (sign below):

Borrower _____ Co-Borrower _____

I. TYPE OF MORTGAGE AND TERMS OF LOAN						
Mortgage Applied for:	<input type="checkbox"/> VA	<input checked="" type="checkbox"/> Conventional	<input type="checkbox"/> Other (explain):		Agency Case Number:	Lender Case Number:
	<input type="checkbox"/> FHA	<input type="checkbox"/> USDA/Rural Housing Service				
Amount:	Interest Rate:	No. of Months:	Amortization Type:		<input checked="" type="checkbox"/> Fixed Rate	<input type="checkbox"/> Other (explain):
\$ 200,000.00	3.750 %	360			<input type="checkbox"/> ARM	<input type="checkbox"/> ARM (explain):

II. PROPERTY INFORMATION AND PURPOSE OF LOAN					
Subject Property Address (street, city, state & ZIP): 123 MAIN ST. TORRANCE, CALIFORNIA 90501	No. of Units:				
Legal Description of Subject Property (which description if necessary): TYPE LEGAL DESCRIPTION HERE, IF LEGAL IS LONGER THAN "7" LINES, PLEASE CLICK ATTACHED? "Y" AND THIS FIELD WILL GREY OUT.	Year Built:				
Purpose of Loan: <input checked="" type="checkbox"/> Purchase <input type="checkbox"/> Construction <input type="checkbox"/> Other (explain): <input type="checkbox"/> Refinance <input type="checkbox"/> Construction-Refinance	Property will be: <input checked="" type="checkbox"/> Primary Residence <input type="checkbox"/> Secondary Residence <input type="checkbox"/> Investment				
Complete this line if construction or construction-permanent loan.					
Year Lot Acquired:	Original Cost:	Amount Existing Liens:	(a) Present Value of Lot:	(b) Cost of Improvements:	Total (a+ b):
\$	\$	\$	\$	\$	\$

DELL



Move your cursor to the area where you want to add text, click, and start typing.

1003.ltr.xml: Uniform Residential Loan Application, MICHAEL SAMPLE, Page 1 of 8

File View Help

Print Zoom In Zoom Out Add Text Del Text Save

Uniform Residential Loan Application

This application is designed to be completed by the applicant(s) with the Lender's assistance. Applicants should complete this form as "Borrower" or "Co-Borrower," as applicable. Co-Borrower information must also be provided (and the appropriate box checked) when the income or assets of a person other than the Borrower (including the Borrower's spouse) will be used as a basis for loan qualification or the income or assets of the Borrower's spouse or other person who has community property rights pursuant to state law will not be used as a basis for loan qualification, but his or her liabilities must be considered because the spouse or other person has community property rights pursuant to applicable law and Borrower resides in a community property state, the security property is located in a community property state, or the Borrower is relying on other property located in a community property state as a basis for repayment of the loan.

If this is an application for joint credit, Borrower and Co-Borrower each agree that we intend to apply for joint credit (sign below):

Just start typing ←

Borrower _____ Co-Borrower _____

I. TYPE OF MORTGAGE AND TERMS OF LOAN					
Mortgage Applied for:	<input type="checkbox"/> VA	<input checked="" type="checkbox"/> Conventional	<input type="checkbox"/> Other (explain):	Agency Case Number	Lender Case Number
	<input type="checkbox"/> FHA	<input type="checkbox"/> USDA/Rural Housing Service			
Amount	Interest Rate	No. of Months	Amortization Type:	<input checked="" type="checkbox"/> Fixed Rate	<input type="checkbox"/> Other (explain):
\$ 200,000.00	3.750 %	360		<input type="checkbox"/> GPM	<input type="checkbox"/> ARM (type):

DELL

Text added appears green.



Click "Save" when done. The entered data will stay on the form unless deleted.

1003.Itr.xml: Uniform Residential Loan Application, MICHAEL SAMPLE, Page 1 of 8

File View Help

Print Zoom In Zoom Out Add Text Del Text Save

Uniform Residential Loan Application

This application is designed to be completed by the applicant(s) with the Lender's assistance. Applicants should complete this form as "Borrower" or "Co-Borrower," as applicable. Co-Borrower information must also be provided (and the appropriate box checked) when the income or assets of a person other than the Borrower (including the Borrower's spouse) will be used as a basis for loan qualification or the income or assets of the Borrower's spouse or other person who has community property rights pursuant to state law will not be used as a basis for loan qualification, but his or her liabilities must be considered because the spouse or other person has community property rights pursuant to applicable law and Borrower resides in a community property state, the security property is located in a community property state, or the Borrower is relying on other property located in a community property state as a basis for repayment of the loan.

If this is an application for joint credit, Borrower and Co-Borrower each agree that we intend to apply for joint credit (sign below):

Just start typing

Borrower _____ Co-Borrower _____

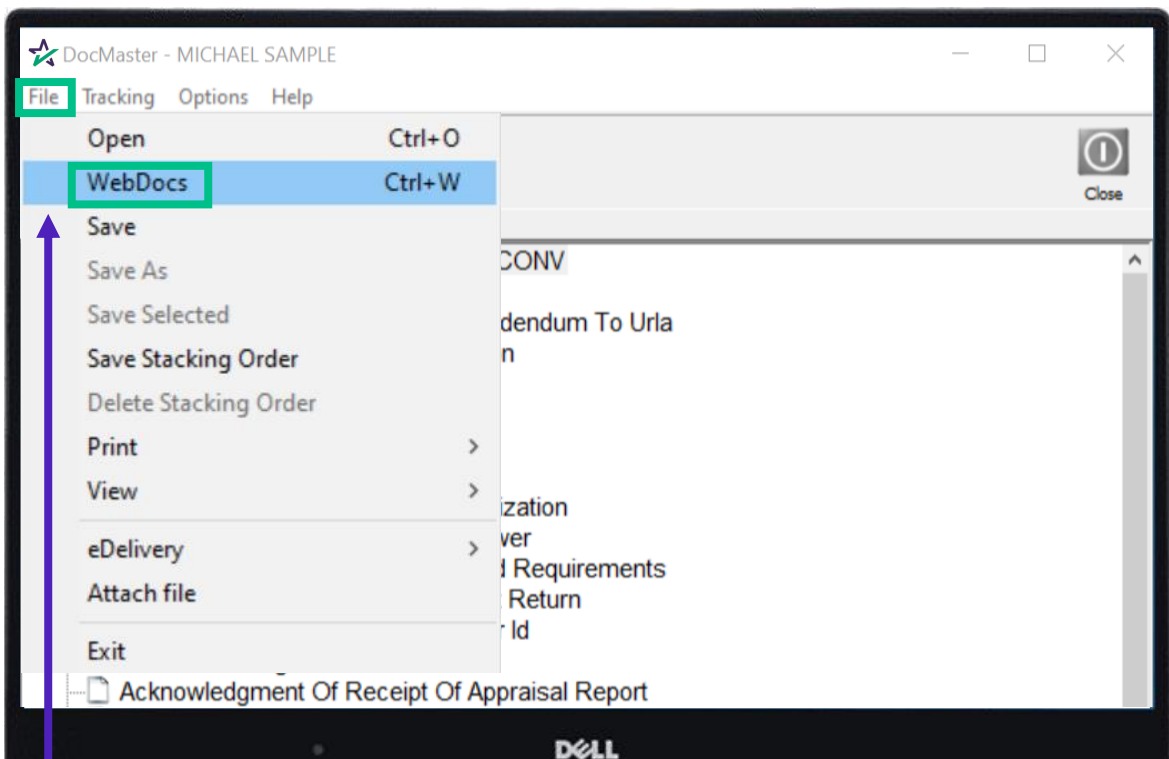
I. TYPE OF MORTGAGE AND TERMS OF LOAN					
Mortgage Applied for:	<input type="checkbox"/> VA	<input checked="" type="checkbox"/> Conventional	<input type="checkbox"/> Other (explain):	Agency Case Number	Lender Case Number
	<input type="checkbox"/> FHA	<input type="checkbox"/> USDA/Rural Housing Service			
Amount	Interest Rate	No. of Months	Amortization Type:	<input checked="" type="checkbox"/> Fixed Rate	<input type="checkbox"/> Other (explain):
\$ 200,000.00	3.750 %	360		<input type="checkbox"/> GPM	<input type="checkbox"/> ARM (type):



DocMaster

WebDocs Code

Each file processed has a “WebDocs” code. DocMaster can access the forms in a loan package using this code.



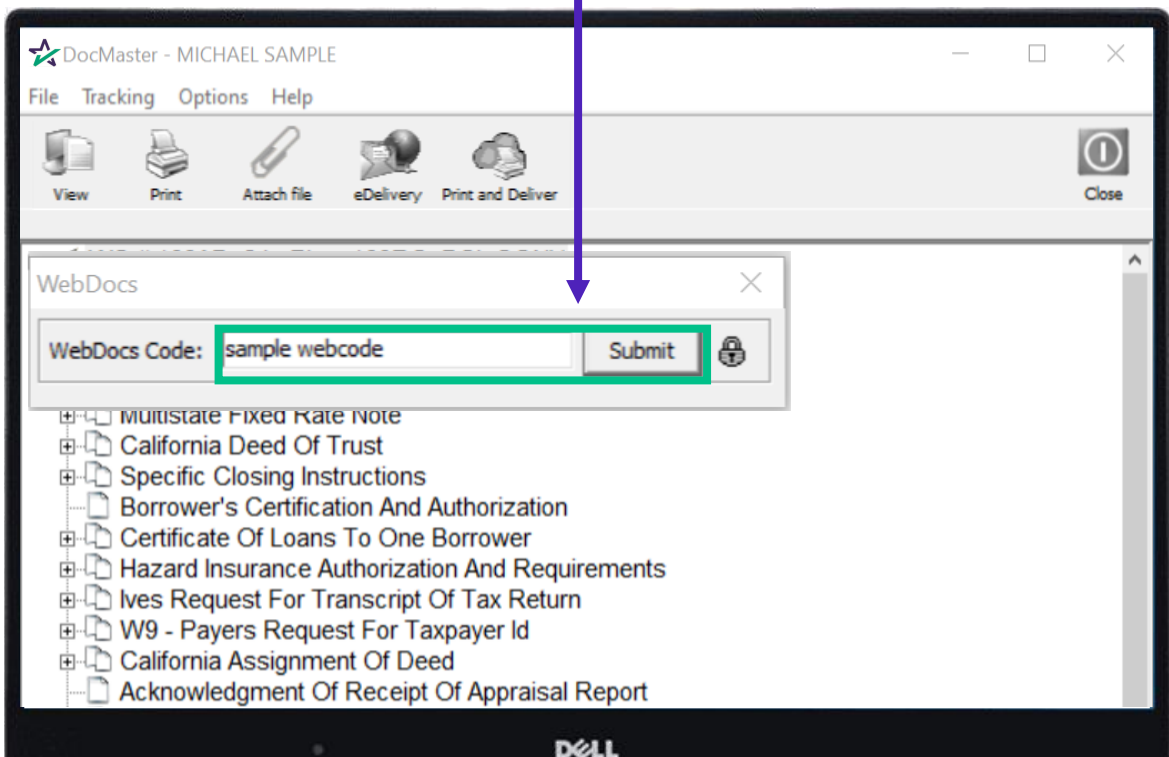
Start by clicking on “File”, then “WebDocs”.



DocMaster

WebDocs Code

Enter WebDocs Code
then click "Submit".



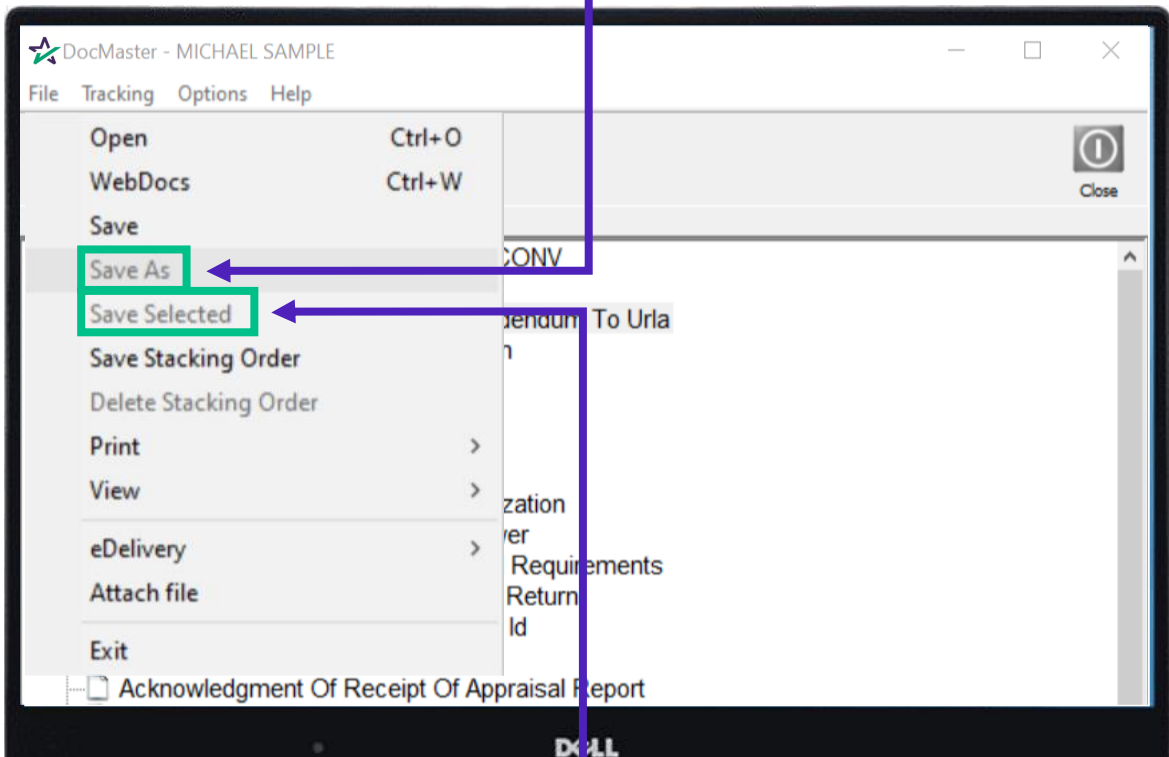
Copy paste is recommended
to ensure accuracy.



DocMaster

Saving a Selected Form in a Package

“Save As” will save the entire package as a DBK or PDF format.



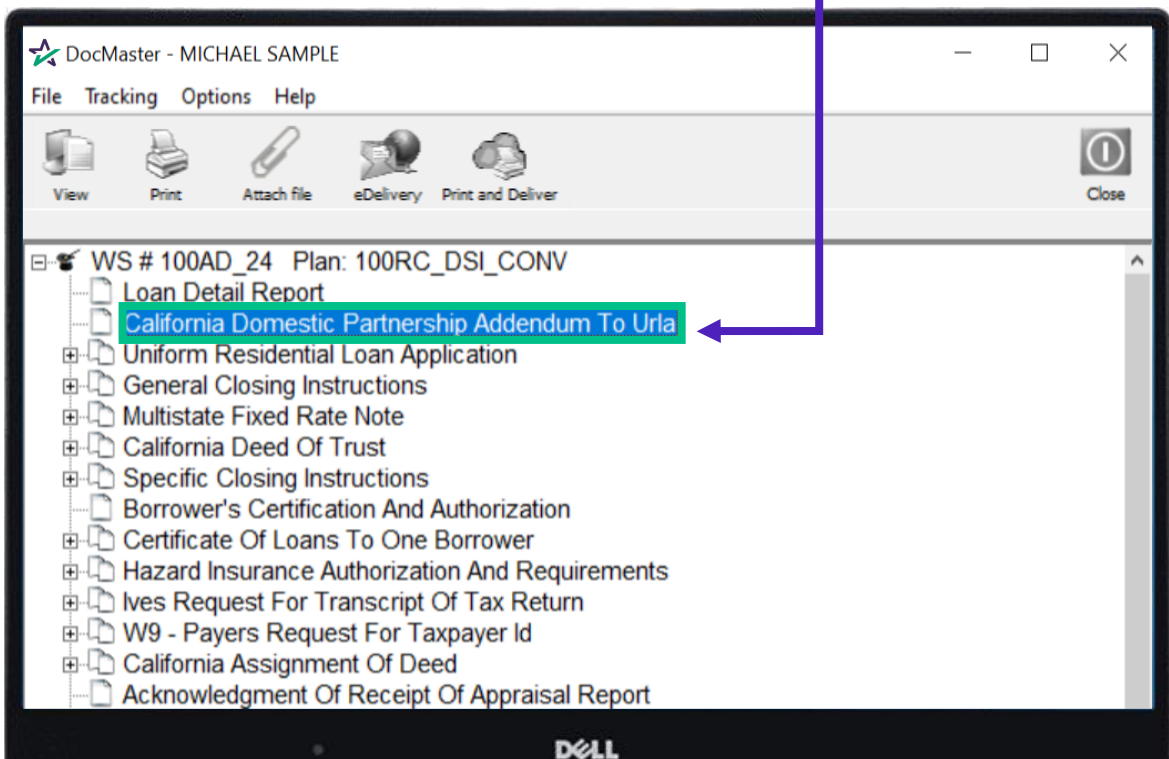
“Save Selected” will allow you to save one or more forms in the package as a DBK or PDF format.



DocMaster

Saving a Selected Form in a Package

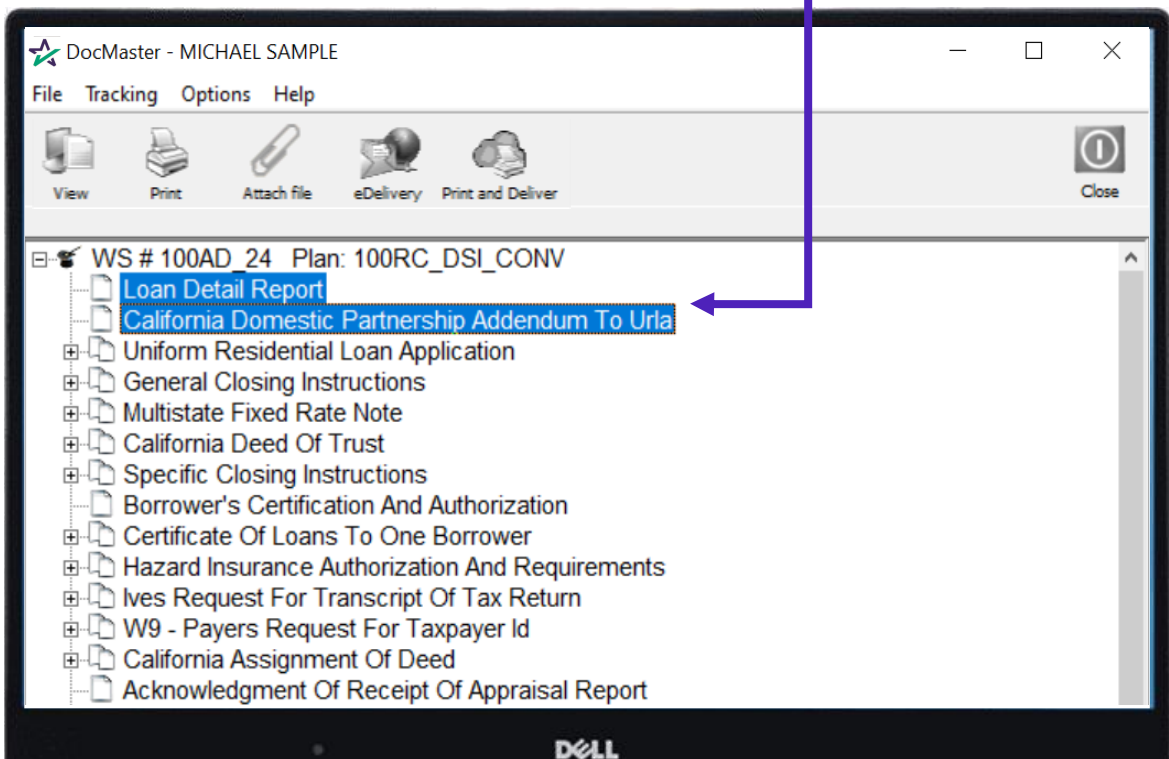
To utilize the "Save Selected" function, start by left clicking on the form you would like to save.



DocMaster

Saving a Selected Form in a Package

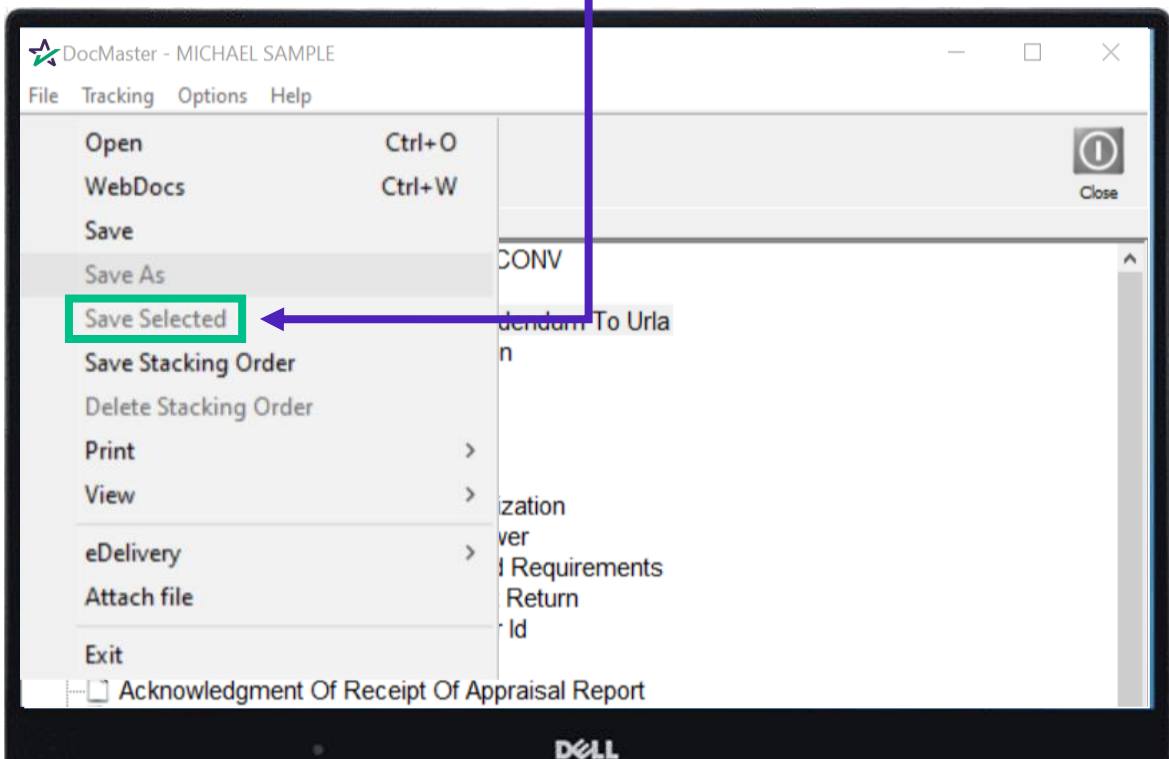
To save several forms, hold down the "Ctrl" key on your keyboard and left click on all the forms you want to save.



DocMaster

Saving a Selected Form in a Package

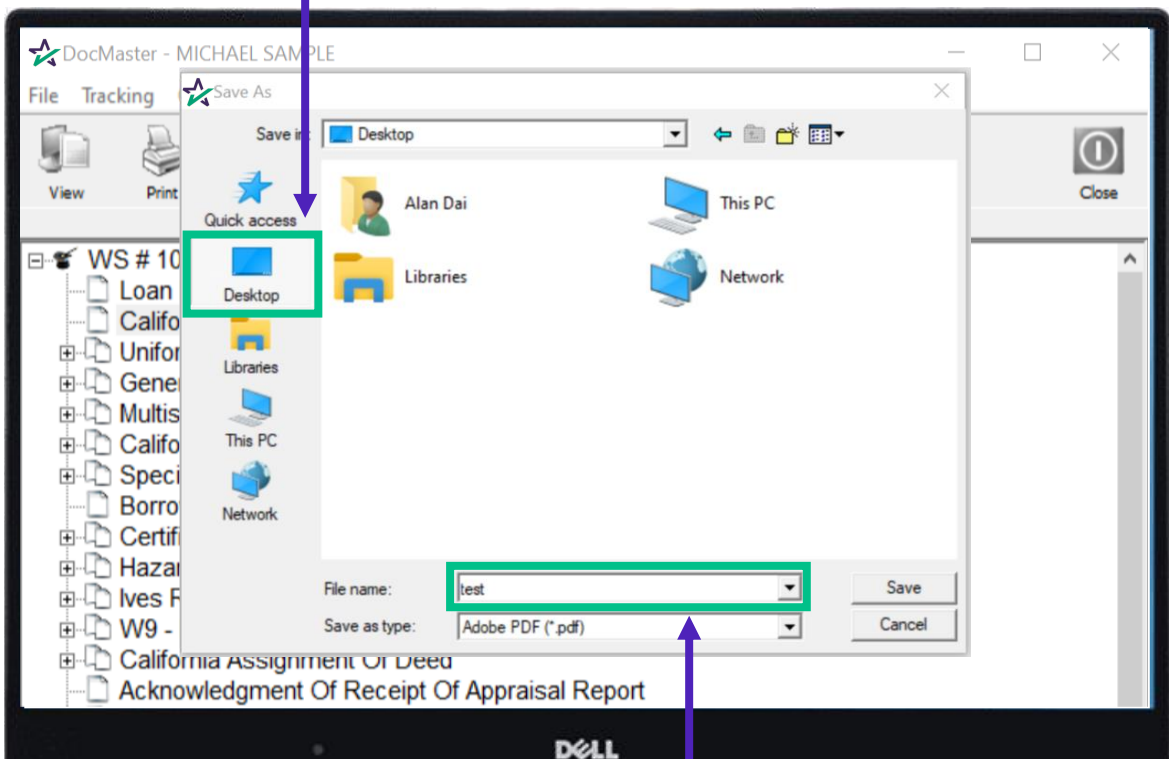
Once you have chosen the files you would like to save, click "File", then "Save Selected".



DocMaster

Saving a Selected Form in a Package

Choose where you want to save the file. For demonstration purposes, this will be saved to the Desktop.



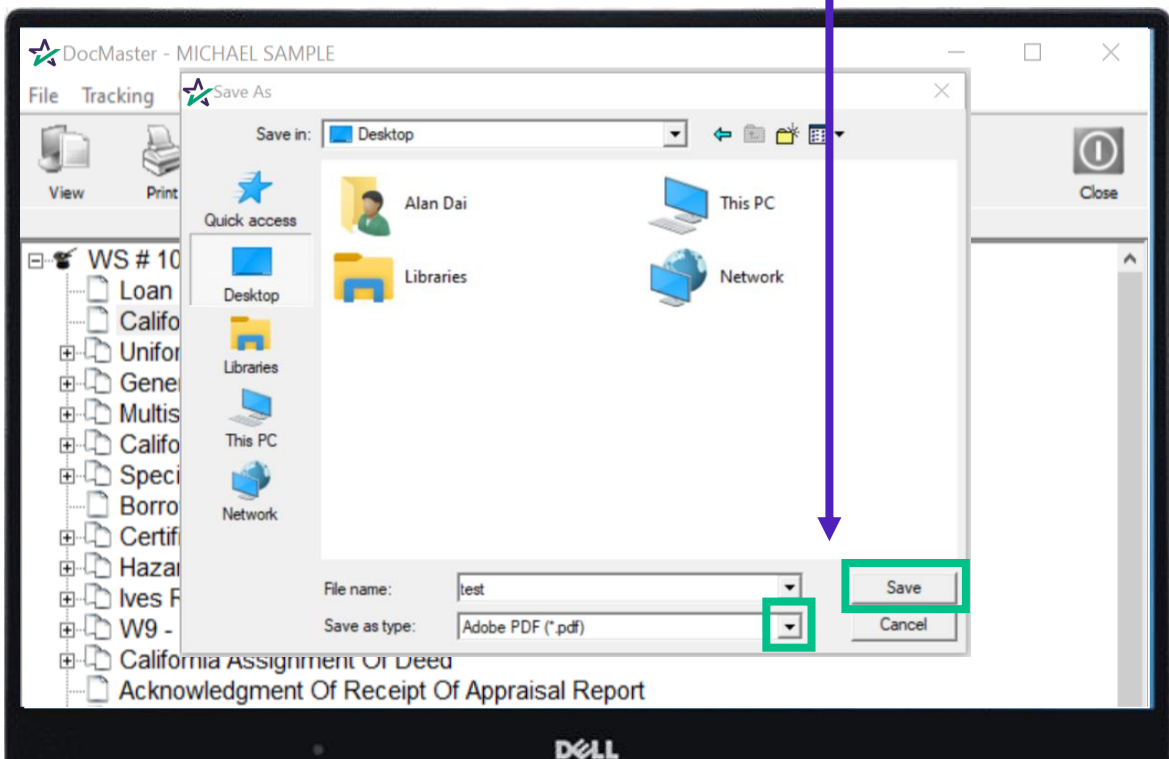
Enter a file name.



DocMaster

Saving a Selected Form in a Package

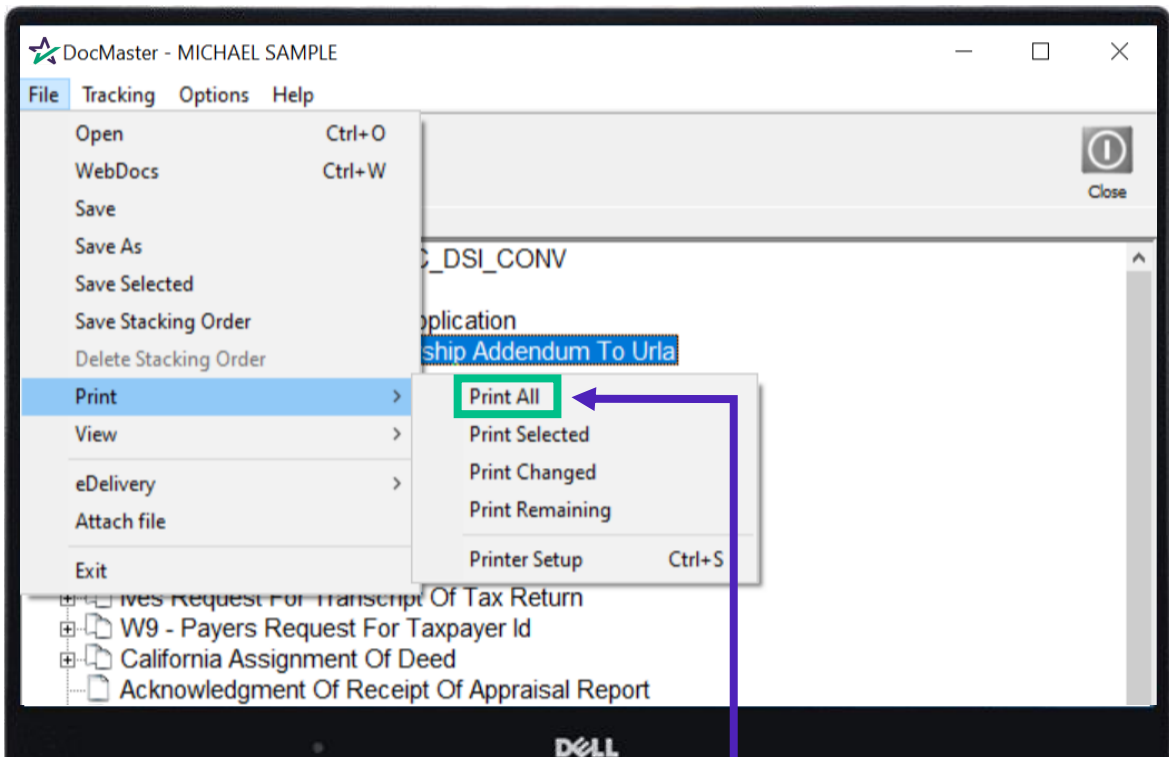
Select in which format you want the file to be saved, either DBK or PDF, from the drop-down menu. Then, click "Save".



DocMaster

How To Print

To print, click "File", then hover the mouse over "Print" to bring up the list of printing options.



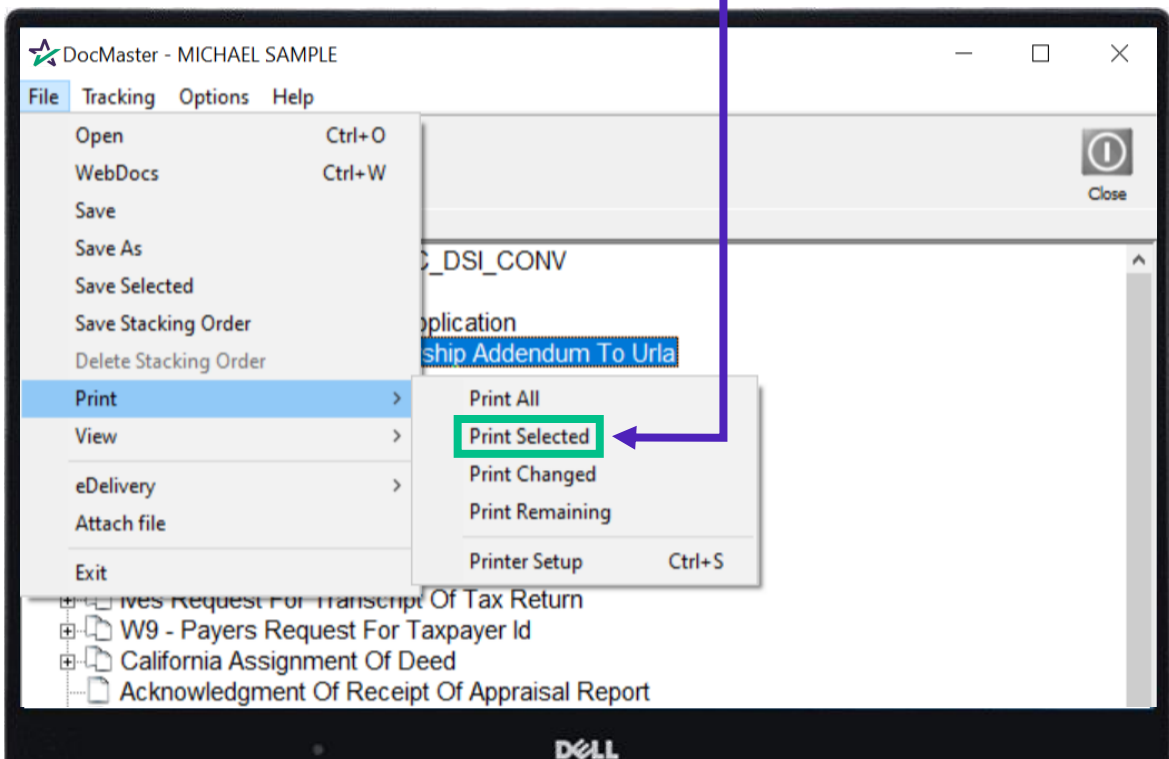
"Print All" prints everything.



DocMaster

How To Print

"Print Selected": Prints out highlighted document(s).



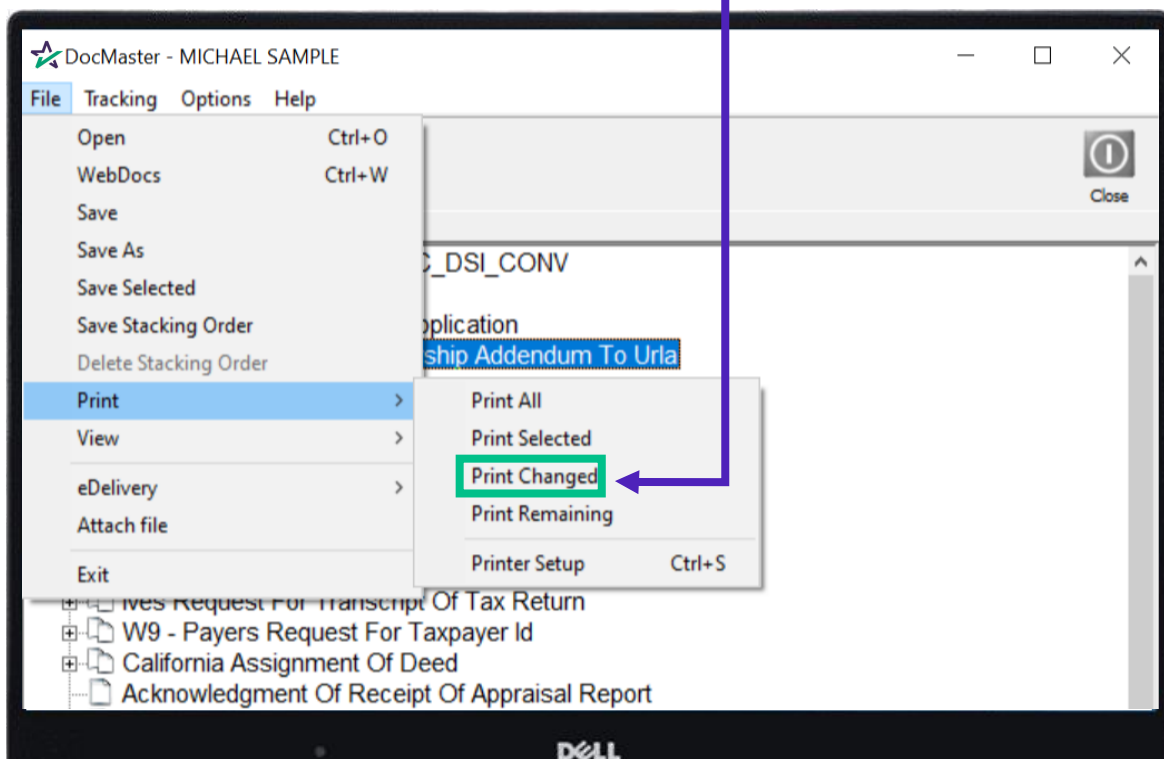
Hold ctrl on the keyboard and left click to highlight or de-select documents.



DocMaster

How To Print

“Print Changed”: Prints out documents that have been affected by data updated after the loan was first processed and viewed in DocMaster.



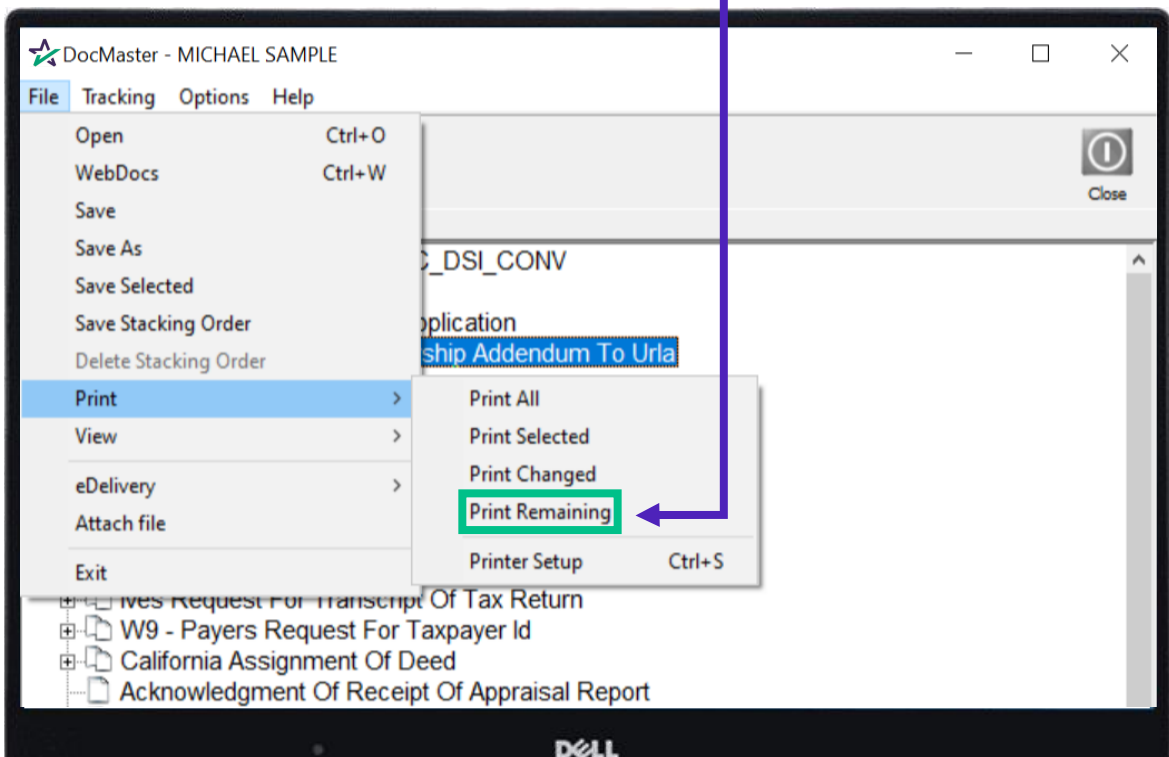
Remember: titles for the forms affected by the new data will appear in red.



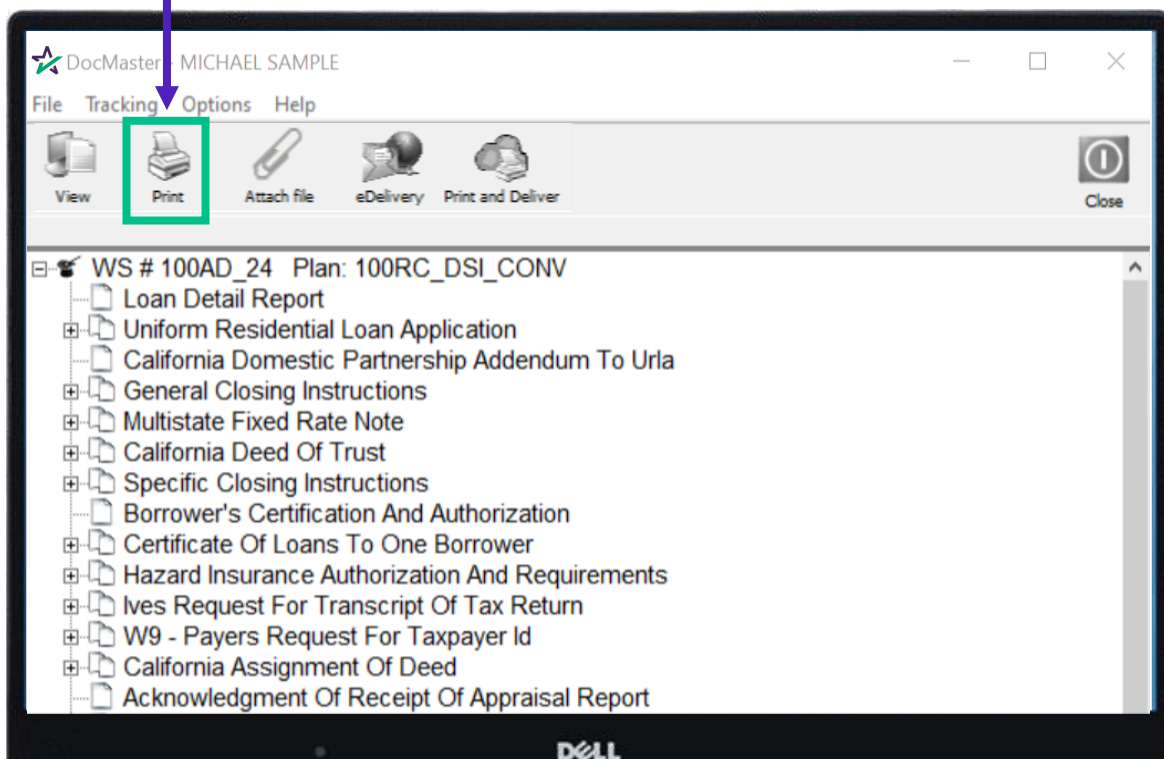
DocMaster

How To Print

“Print Remaining”: Allows you to highlight a single document, print out that document, and then print out every subsequent document below it.



You can also print by clicking on the Print icon.



If no documents are highlighted, (as shown above) clicking on the Print icon defaults to the Print All function.

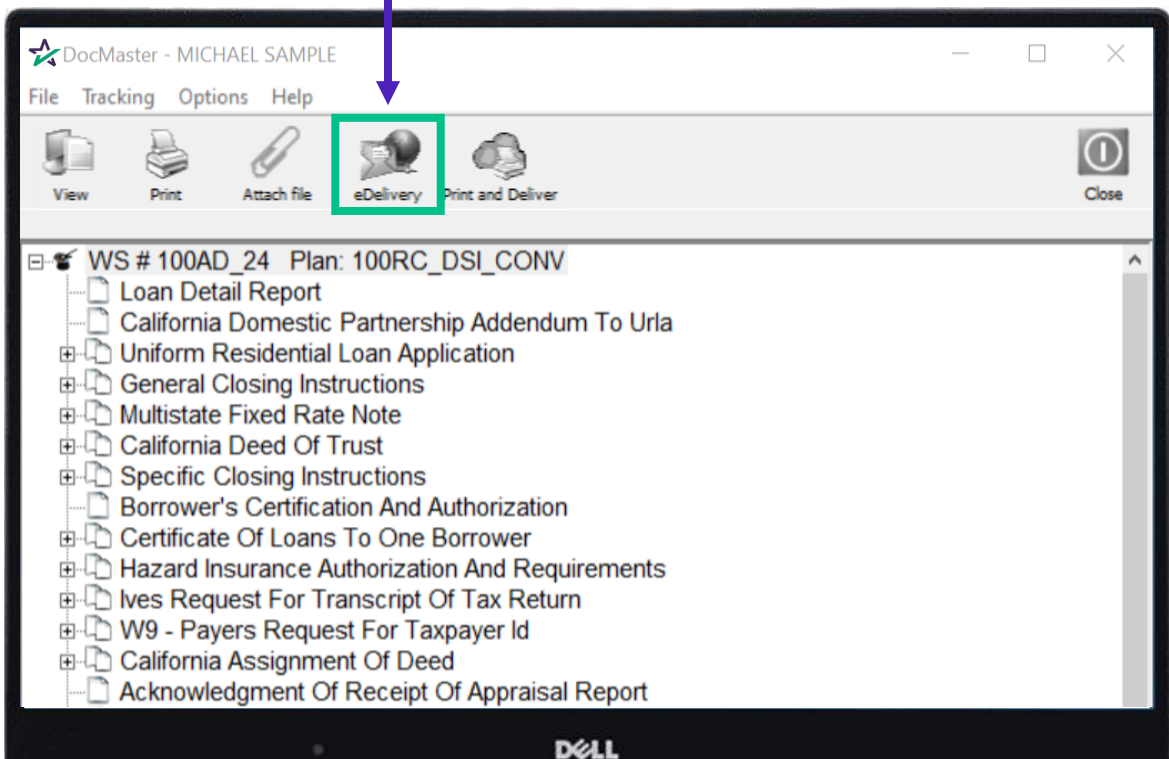
If documents are highlighted, clicking on the Print icon defaults to the Print Selected function.



DocMaster

eDelivery

eDelivery in DocMaster is very similar to regular e-mail. Click here to use it.



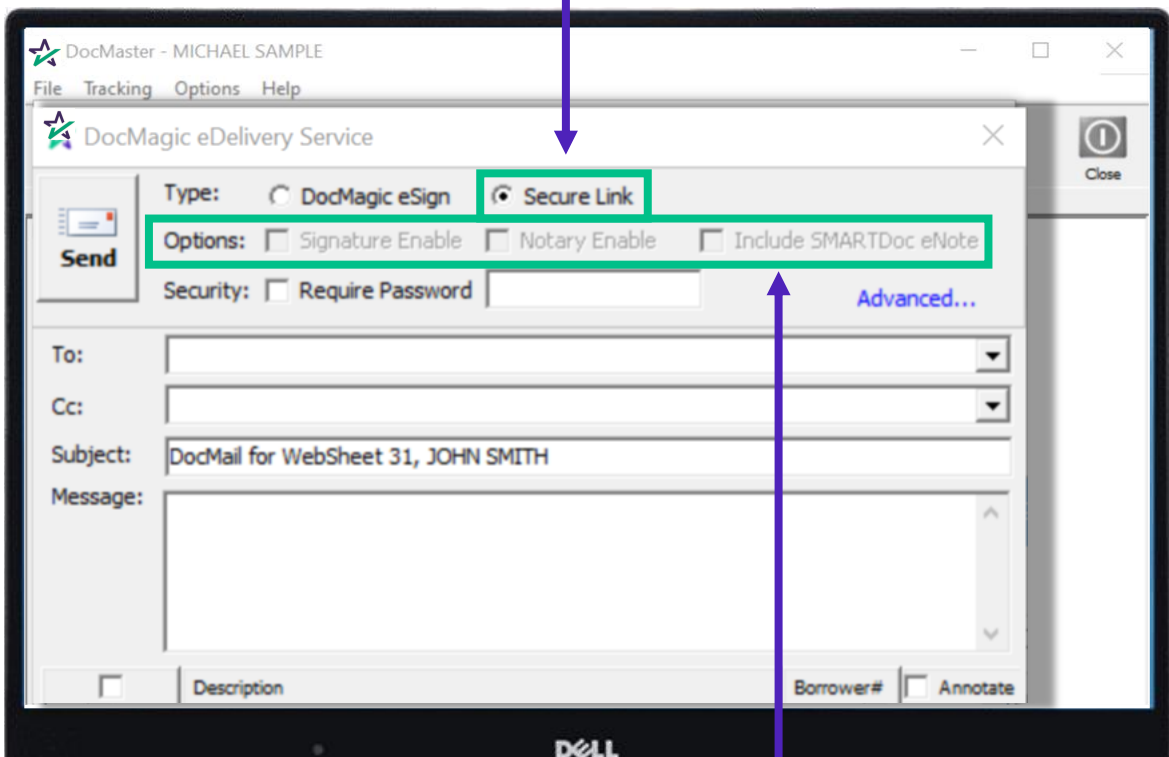
Make sure to select at least one form before clicking eDelivery or the button will be greyed out and unclickable.



DocMaster

eDelivery

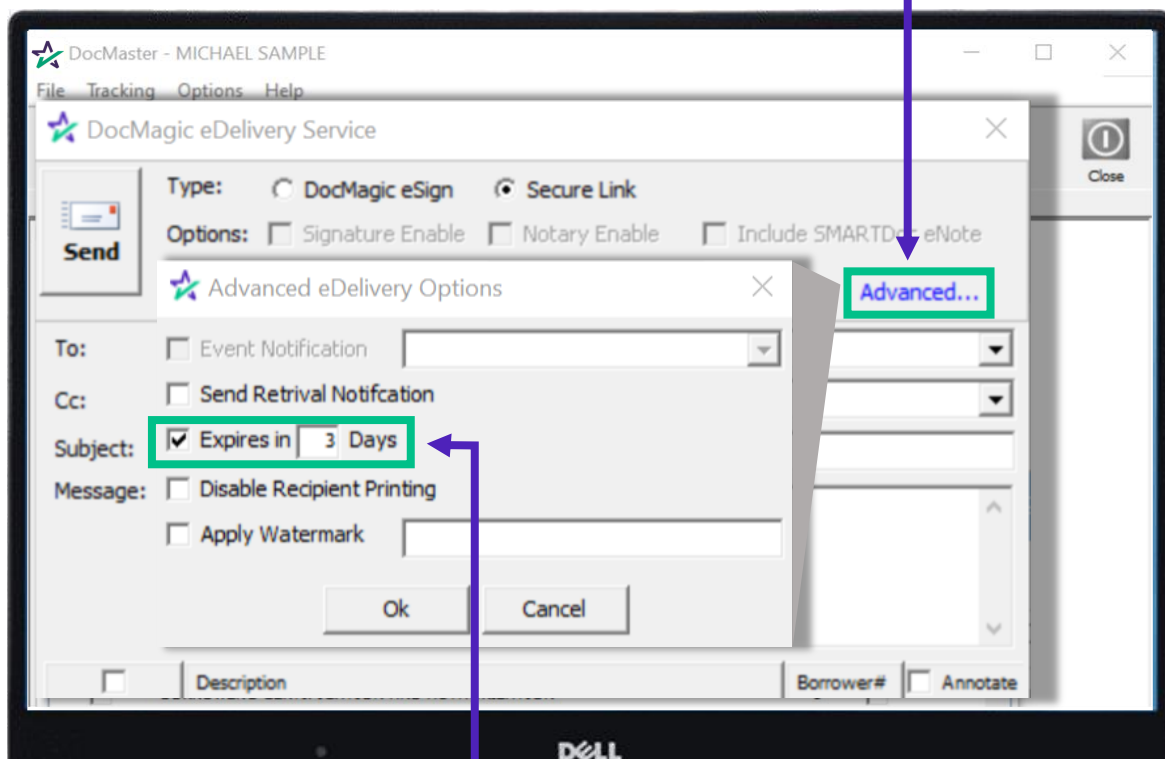
“Secure Link” is used for sending closing packages and NOT for closing disclosures.



These options will be greyed out for Secure Link.



Click Advanced to open this window that brings up more options.



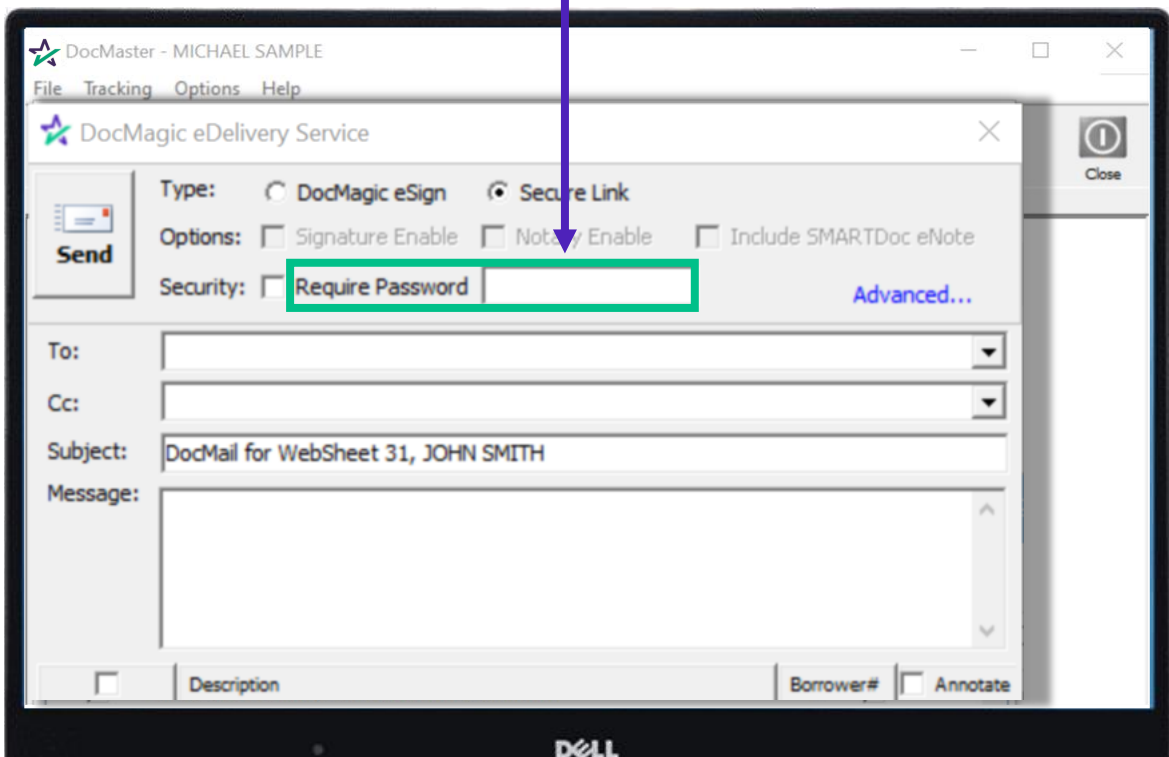
Select the number of days that the e-mail will be available to the recipient before it can no longer be accessed. Check the box to turn on this option. The default is 3 days.



DocMaster

eDelivery

If you want the recipient to enter a password before they can access the package, check the box and enter the password in the "Require Password" field.



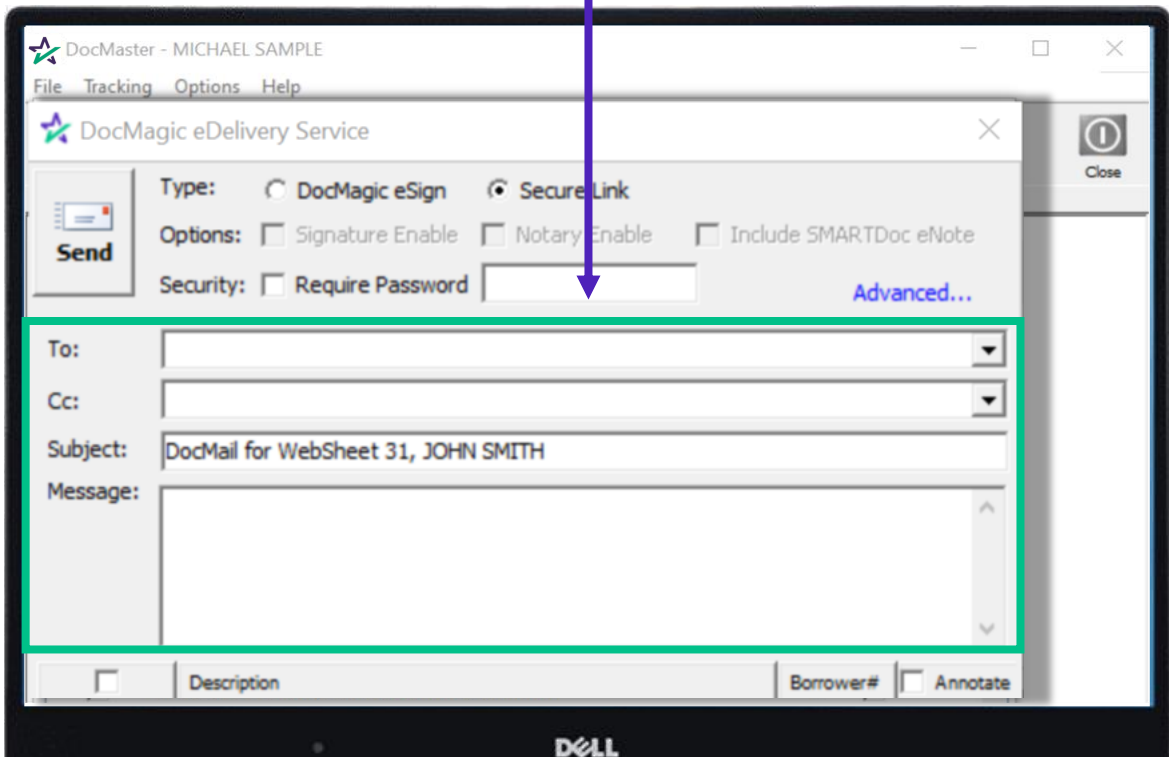
The password will have to be conveyed to the recipient either by email or phone call. DocMagic employees will not know the password.



DocMaster

eDelivery

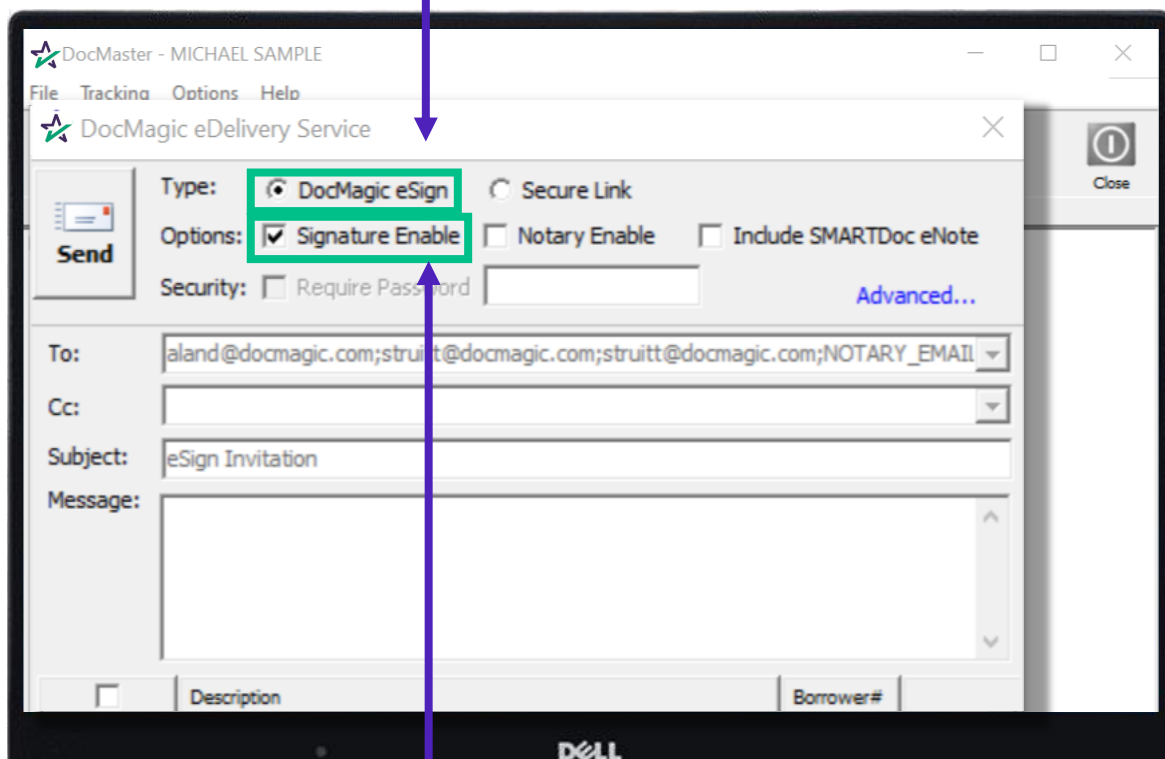
With Secure Link, you'll have the option to enter information in these fields.



DocMaster

DocMagic eSign

DocMagic eSign will allow the user to send the closing disclosure.



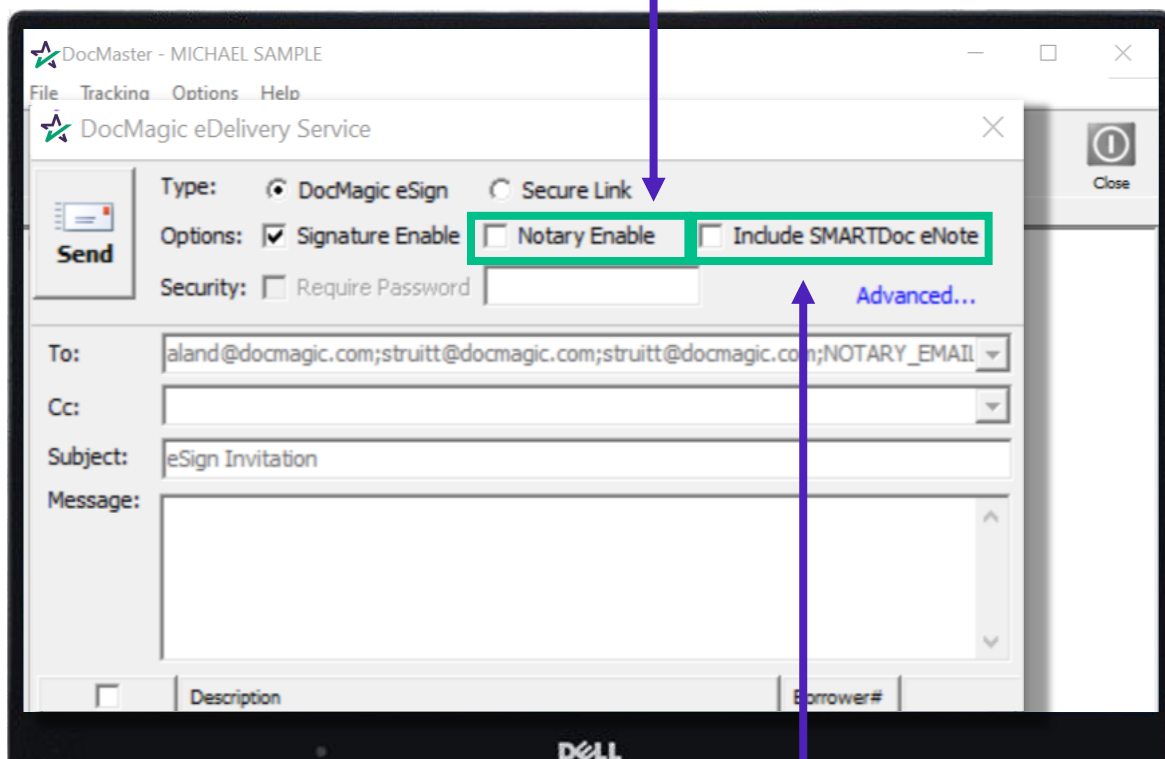
Signature enable will allow the borrower to electronically sign the documents.



DocMaster

DocMagic eSign

Total eClose options are now available if DocMagic eSign is selected. Check Notary Enable to enable electronic notarization of closing documents.



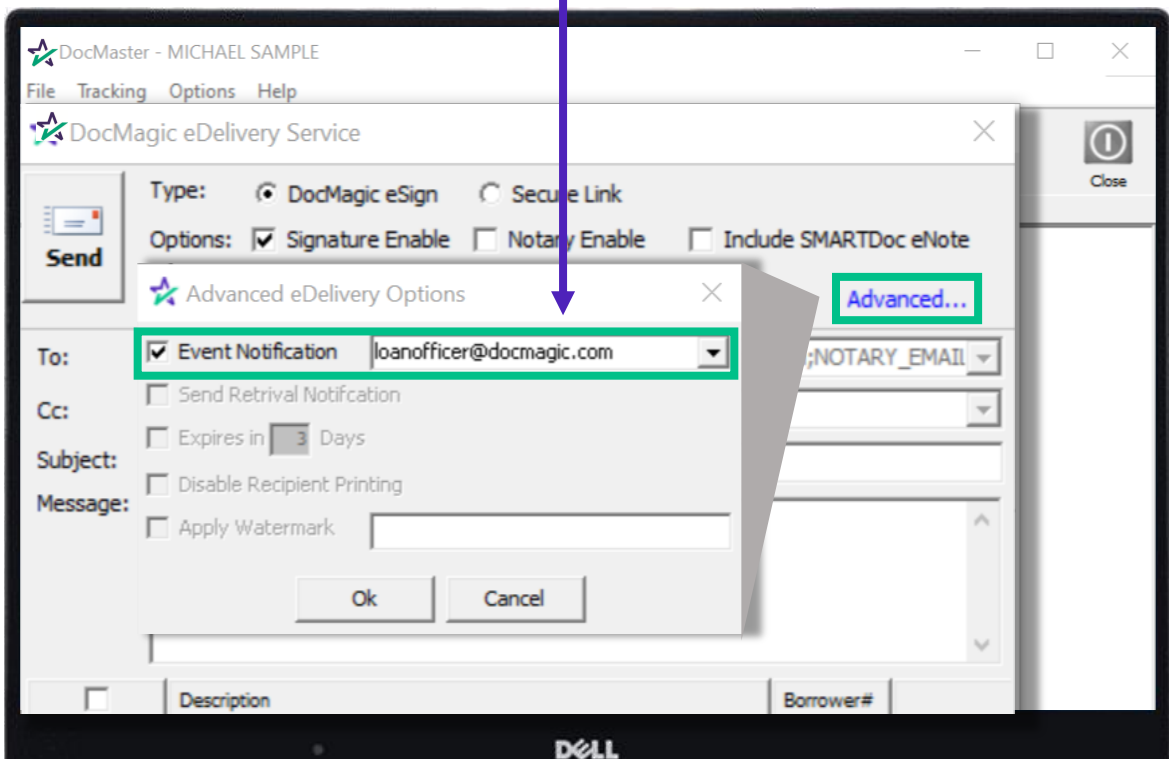
Select Include SMARTDoc eNote to include an electronic note within the closing document package.



DocMaster

DocMagic eSign

From the Advanced window, Event Notification keeps other participants informed of the process. Select eligible recipients from the dropdown.



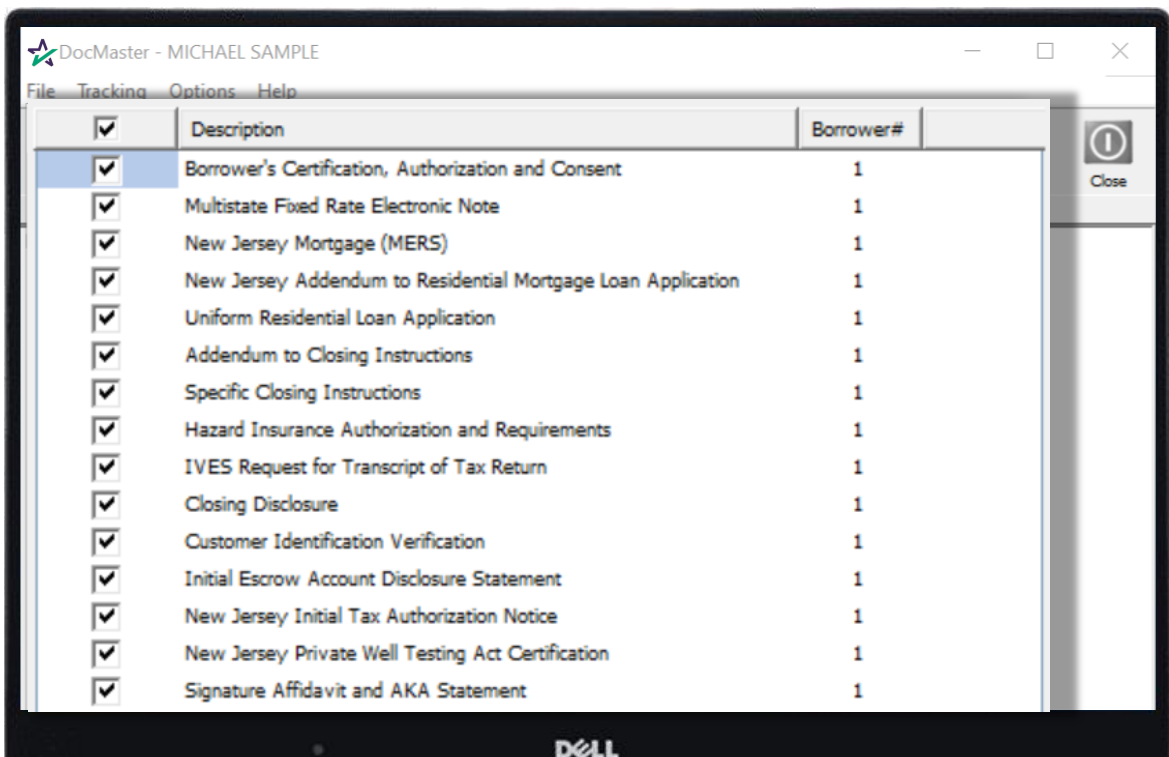
The e-mail that goes out will automatically be formatted to meet certain Federal guidelines regarding electronic disclosures. Some fields may be unavailable when selecting DocMagic eSign.



DocMaster

DocMagic eSign

Scroll down to see the list of documents that will be sent out for eDelivery.



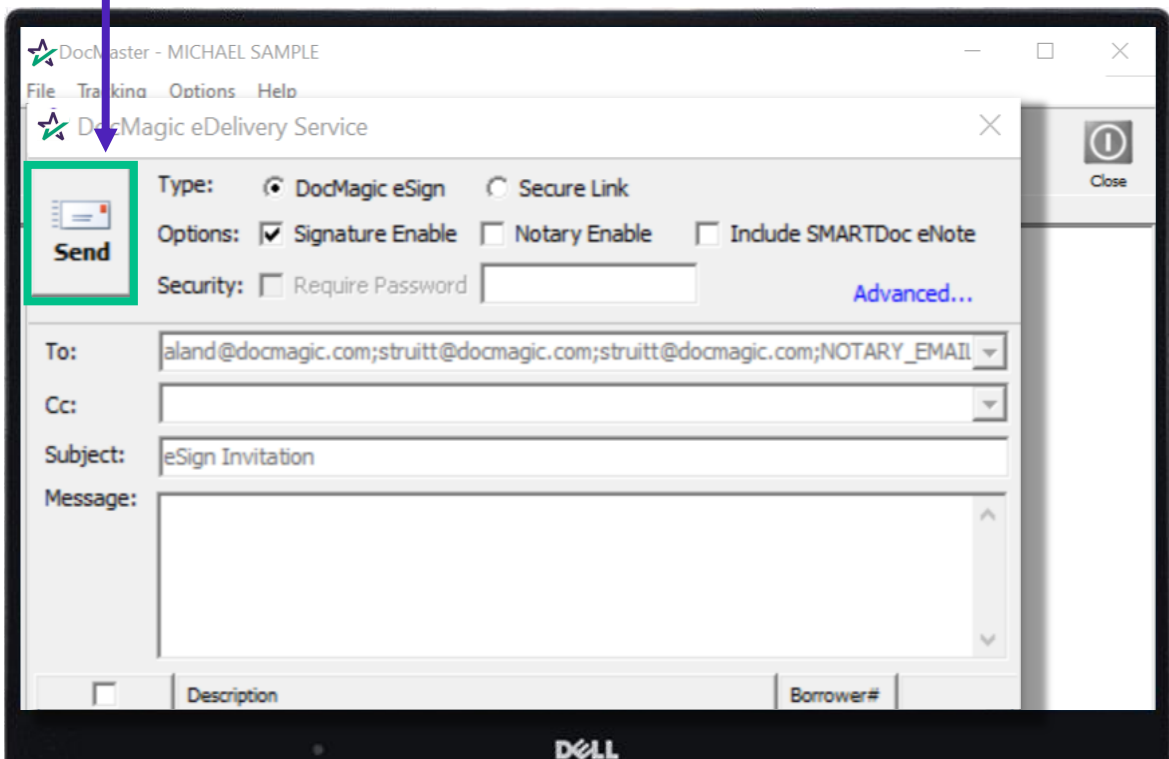
By default, all documents will be selected. Uncheck documents that you do not want to be sent.



DocMaster

DocMagic eSign

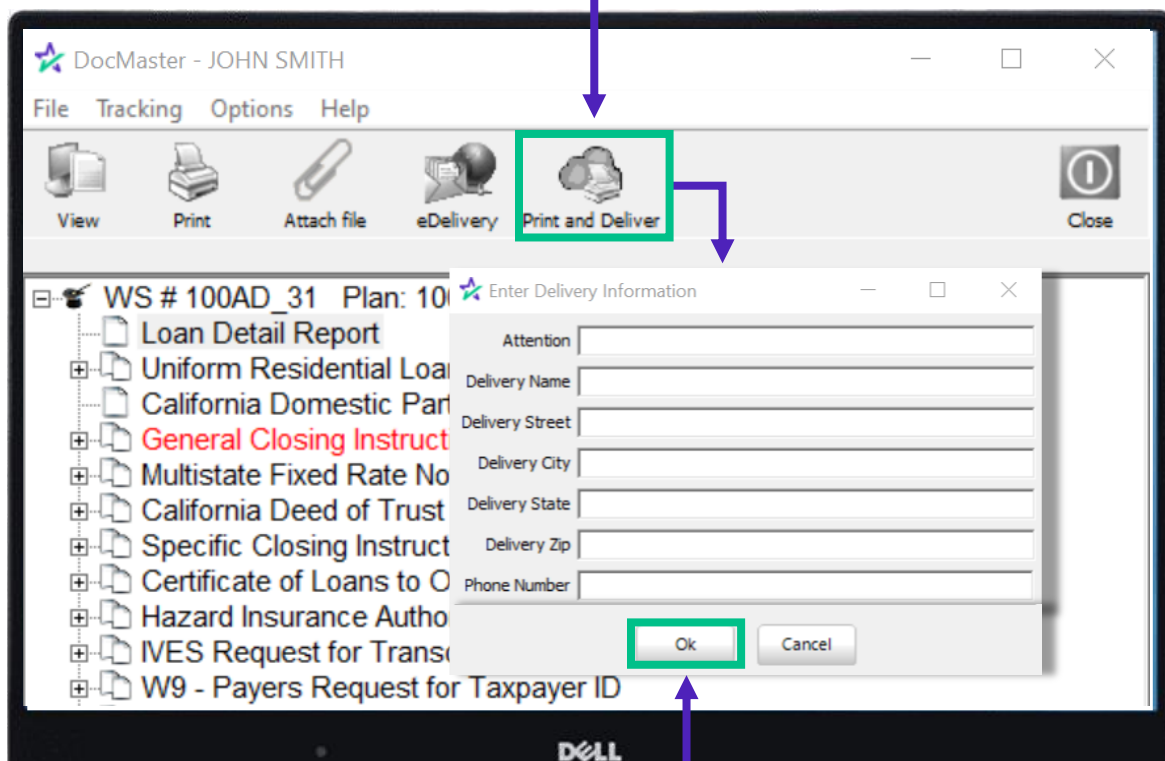
Click Send to send out the package when you're done.



DocMaster

Print and Deliver

“Print and Deliver” option is a request for DocMagic to print, compile, and mail out the package.



Enter the recipient and address, then click Ok.

