

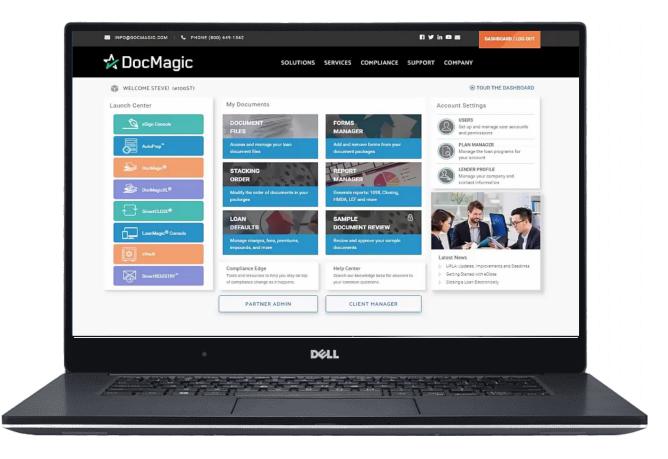
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#### Before Getting Started

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



Admin privileges are required for user set-up.



#### Logging onto DocMagic

Go to www.docmagic.com



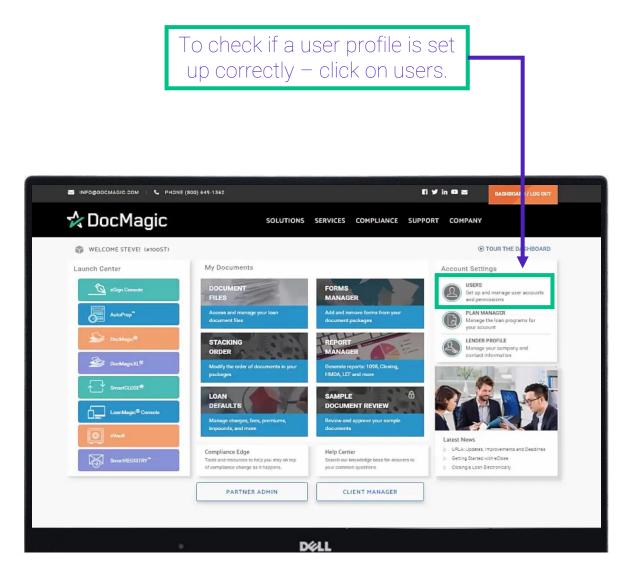


#### Logging onto DocMagic

[	Enter your email and p	password.
MFO@DOCMAGIC.COM	PHONE (800) 649-1362	f y in 🖻 🔤 🛛 LOG IN
🛧 DocMagic	SOLUTIONS SERVICES CO	PLIANCE SUPPORT COMPANY
	Log In	
	Hello! Sign into your DocMagic Account.	
	byron@docmagic.com	
	FORGOT PASSWORD? LOG IN	
	1	
	Déll	
	Click "LOG IN	υ
	CHICK LUG IN	



#### User Permissions





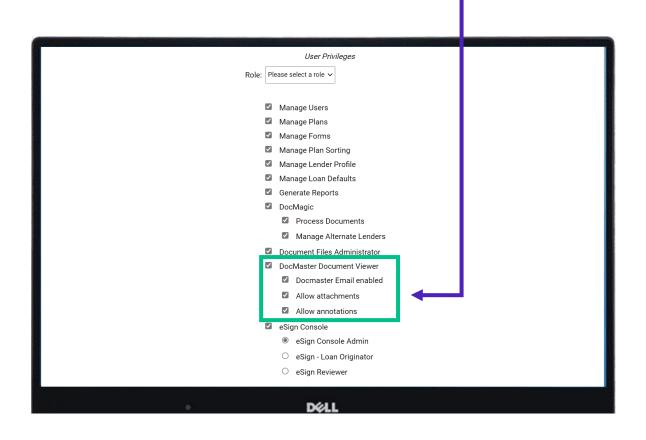
#### User Permissions





#### User Permissions

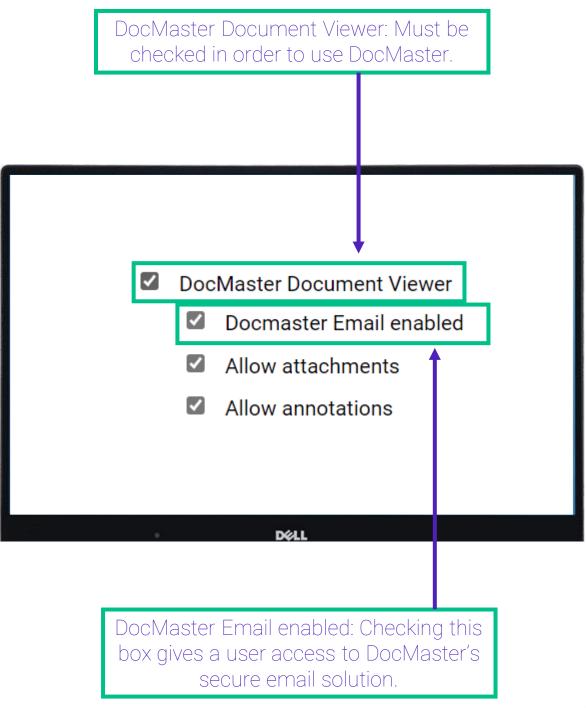
# Scroll down to User Privileges – specifically, the DocMaster ones highlighted below.



The next slides will break down these priveleges.



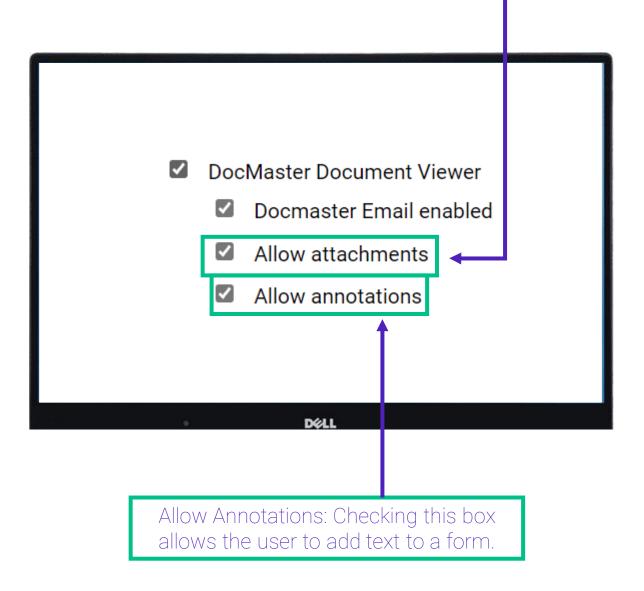
Permission Definitions





Permission Definitions

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





#### Saving Changes

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.

	<ul><li>Redisclosure</li><li>Servicing Transfer</li></ul>										
	<ul> <li>Servicing transfer</li> <li>Underwriting</li> </ul>										
	<ul> <li>Uniform Residential Loan Application</li> </ul>										
		* Re	equired fields								
CANCEL	SEL	ECT ALL	DEACTIVA	TE ALL	FINISHED						

Clicking finished brings you back to the dashboard.



nated Compliance

the loan process

Compliance Edge

Compliance Wizard

Ensuring compliance at every stage of

#### 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. 🛠 DocMagic SERVICES COMPLIANCE SUPPORT COMPANY Solutions Innovative, automated, and compliant technology solutions designed to advance every stage of your mortgage loan process **Document Generation** eSignature Seamless and compliant digital platforms We ensure data and document accuracy eSign and eNotarize electronic documents from initial disclosures to closing and automate appraisal delivery for completely paperless eClosings DocMagic eSign Total eClose Packages SmartClose eNotary Appraisal eDelivery Downloads eVault

#### Mobile Mortgage Technology Tools for borrowers, lenders and title agents to collaborate on the loan process

Engage borrowers with mobile access to the loan process

LoanMagic

Click "Downloads".

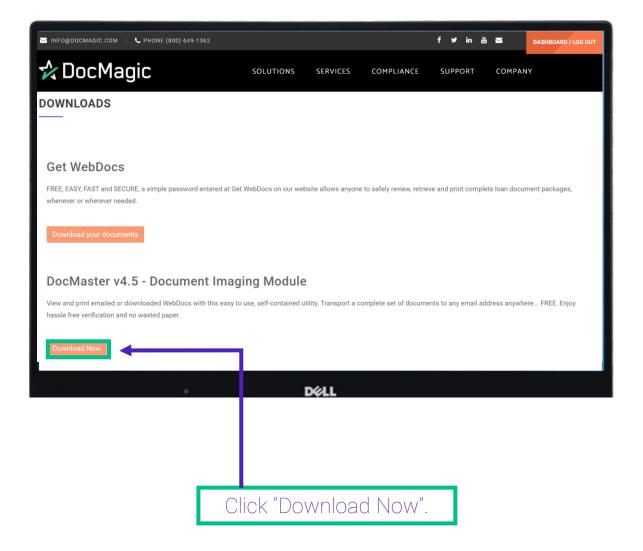
DELL

LoanMagic

SmartClose



#### Downloading and Installing DocMaster





#### Downloading and Installing DocMaster

Follow the instructions on this page.

🔄 INFO@DOCMAGIC.COM   📞 PHONE (800) 649-1362												
🛠 DocMagic	SOLUTIONS	SERVICES	COMPLIANCE									
DOCMASTER												
To view, print or email a set of documents (*.dbk), download an	d install DocMaster by f	ollowing the instru	ctions below.									
Complete Install:												
1. Click on the Begin Download button to download DocMas	ster.											
2. After downloading the program, navigate to the path in which the file was saved.												
3. Double-click the <i>docmaster4580.exe</i> icon. DocMaster wil	3. Double-click the <i>docmaster4580.exe</i> icon. DocMaster will then install automatically.											
4. Once installed, simply click the new DocMaster icon to la	unch the program.											
DØL		Download										
Click "Dov	wnload".											



#### Downloading and Installing DocMaster

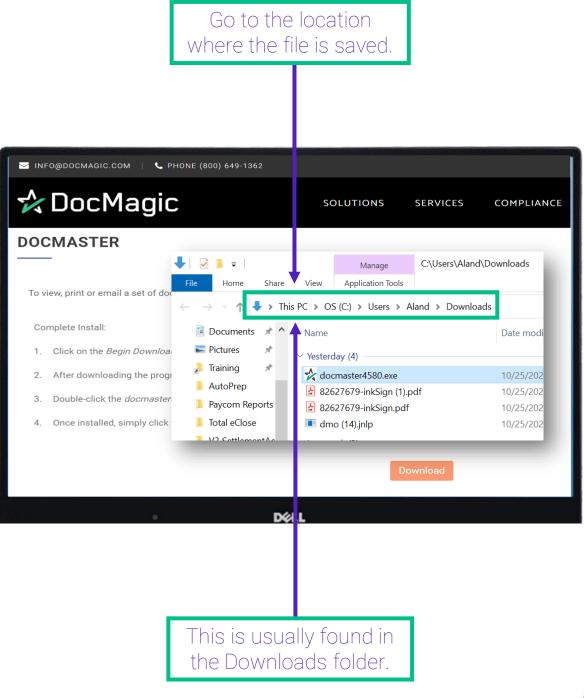
Sometimes a security warning or banner may appear during the installation. If so, click "Run".

✓ INFO@DOCMAGIC.COM				
🛠 DocMagic	SOLU TI	ONS SE	RVICES	COMPLIANCE
DOCMASTER				
To view, print or email a set of documents (*.dbk), download	d and install Doc <i>I</i> la	aster by followir	ng the instructi	ions below.
Complete Install:				
1. Click on the <i>Begin Download</i> button to download Doc	Master.			
2. After downloading the program, navigate to the path i	n which the file v as	s saved.		
3. Double-click the <i>docmaster4580.exe</i> icon. DocMaster	will then install aut	tomatically.		
4. Once installed, simply click the new DocMaster icon to	o launch the progra	am.		
Do you want to run or save <b>docmaster4580.exe</b> (9.03 MB) from <b>download.docmagic</b> This type of file could harm your computer.	.com?		Run Sa	ve 🔻 Cancel
D	¢LL			

DocMaster is safe and will not harm your computer.



#### Downloading and Installing DocMaster





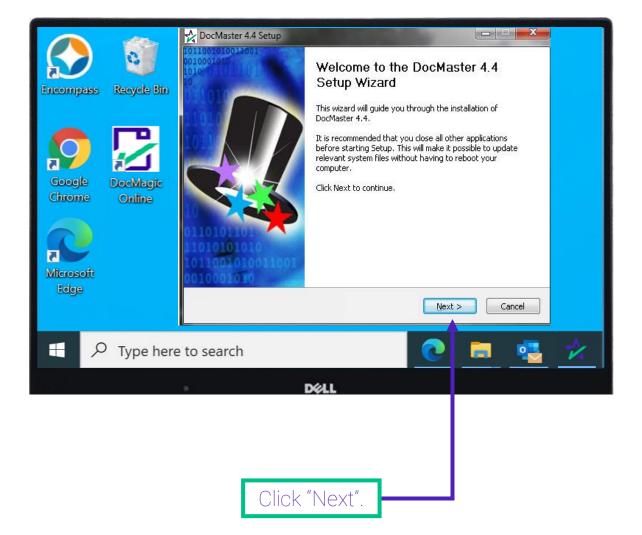
#### Downloading and Installing DocMaster

Double-click the docmaster4580.exe file. DocMaster will then install automatically. **L** PHONE (800) 649-1362 🖂 INFO@DOCMAGIC.COM 🛛 🛠 DocMagic SOLUTIONS SERVICES COMPLIANCE **DOCMASTER** 🕂 | 🛃 📜 ₹ | C:\Users\Aland\Downloads Mana Application Tools Home Share View To view, print or email a set of doo > This PC > OS (C:) > Use s > Aland > Downloads Complete Install: Documents \* ~ Date modi Name Nictures \* Click on the Begin Download 1. ✓ Yesterday (4) , Training \* docmaster4580.exe After downloading the progr 10/25/202 2. 📕 AutoPrep 🚖 82627679-inkSign (1).pdf 10/25/202 Double-click the docmaster 3. Paycom Reports A2627679-inkSign.pdf 10/25/202 Once installed, simply click 📕 Total eClose 🔳 dmo (14).jnlp 4. 10/25/202 V/2 CottlomontA DELL



#### Downloading and Installing DocMaster

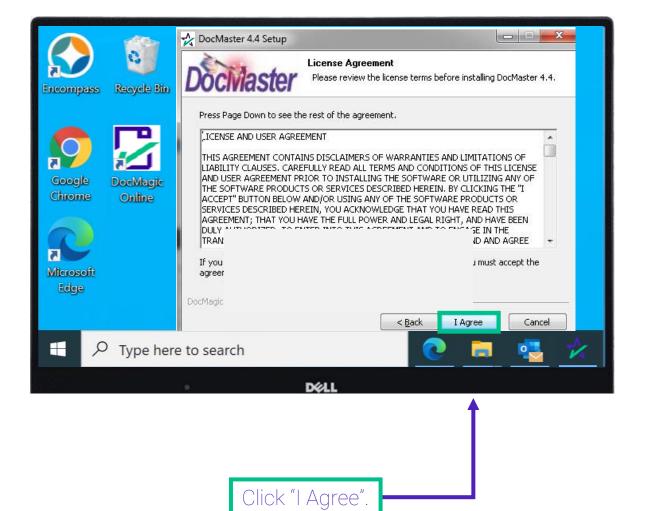
The installation wizard will appear the first time you launch DocMaster.





#### Downloading and Installing DocMaster

#### The End User License Agreement (EULA) will appear.





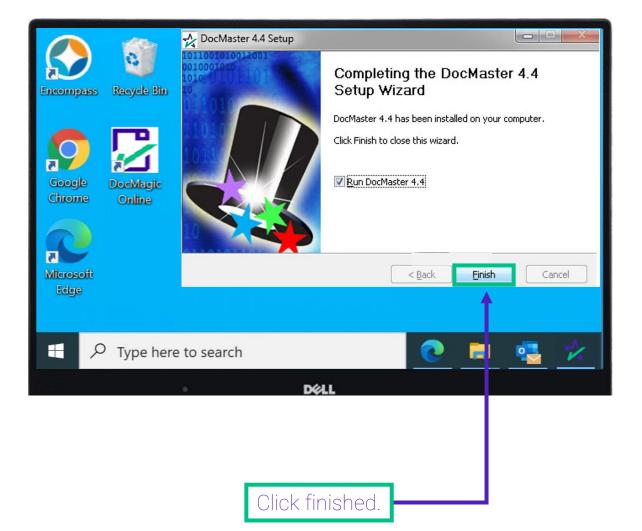
#### Downloading and Installing DocMaster

DocMaster will now be installed on your computer.

Image: constraint of the second sec	DocMaster 4.4 Setup   Installing   Please wait while DocMaster 4.4 is being installed.     Setting System Restore point     Show details     DocMagic     < <td>Rest     &lt;<td>Qack     Mext &gt;   Cancel</td></td>	Rest     < <td>Qack     Mext &gt;   Cancel</td>	Qack     Mext >   Cancel
Type here	to search DELL Once the green bar fills up, you will be able to click "Next" to advance.		

#### Downloading and Installing DocMaster

DocMaster is now installed.





#### Downloading and Installing DocMaster

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

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File Tracking Options Help	
View Print Attach file eDelivery Print and	Deliver Close
Gi Onlin	NOT Loaded
Microsoft Edge DocMagic Online	
Type here to search	💽 🧮 🛃 🖈
	DELL



#### 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.

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	General	Borrowe	rs/Sellers	Property	Terms	Provi	ders/Liens	Charg	es/Fees	Prepaids	Impound	s Und	erwriting	Closing	Summaries	1			ocMa	igic
	Genera	al Informa	ation	i di								Ċ.		ates & Tin	nes	5.0				
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	Loar	n Program	n ALL FI	XED LOAN	S (DSI_	CONV)					~	o Add	1	Pre-Z Sen		03/02/2				
	Alter	mate Len	der								~	Add			Issue Date able Through	03/02/2				
	Tran	sfer To										~			roceed Date	03/06/2			PI	~
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1	Loar	n Purpose	PURC	HASE			~	S	ame Ler	nder				CD/Re-dis	sc Rec'd Date		3			
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																				5

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



#### Processing a Set of Documents

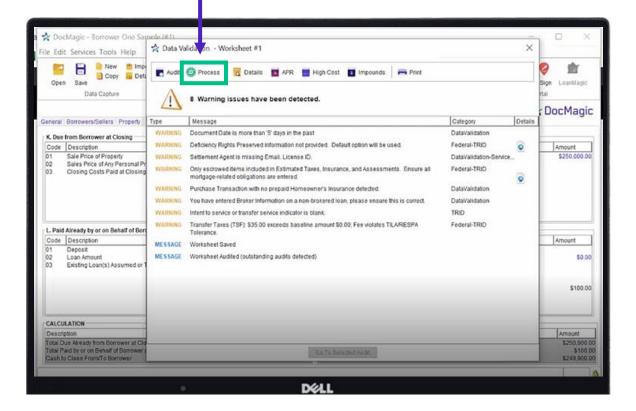
Enter all relevant information in DMO then click audit.

File Edit Services T	ower One Sample (#21) ools Help						- 🗆 X
iun Open Save	New Mimport Copy Default Capture	dit Details API		Process View Generate	Email Appraisal Delivery	UCD Collaboratio	n eSign LoanMagic Portal
General Borrowers	/Sellers Property Terms P	roviders/Liens Ch	narges/Fees Prepaids/Impo	ounds Underwriting	g Closing Summaries		A DocMagic
Loan Stage Loan Program Alternate Lende Transfer To Broker Name Origination Loan Rep Loan Type Lien Position Loan Number MIC / Agency # Loan Identifiers	BROKER NAME LOAN REP CONVENTIONAL PURCHASE LOANNUMBER	<ul> <li>C</li> <li>V</li> <li>U</li> <li>U</li></ul>		V Add V Add V Add V V V	Pre-Z Send Date Estimate Issue Date Est. Available Through Intent to Proceed Date Rate Lock Date	03/08/2016 31 03/10/2016 31	12:00 AM v PT v 3 Days 12:00 AM V PT v 3.750 % v



#### Processing a Set of Documents

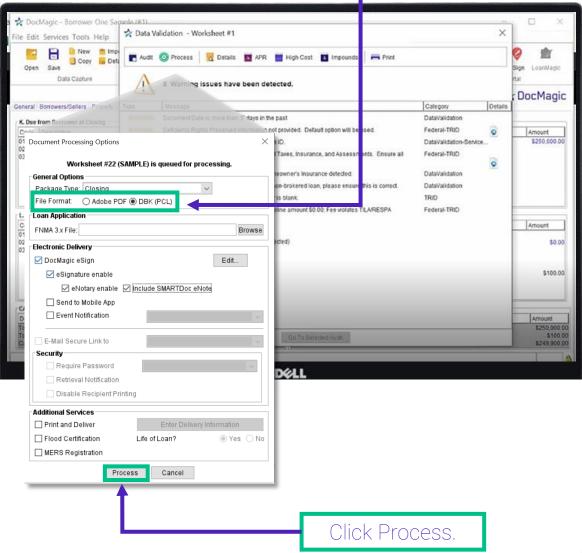






#### Processing a Set of Documents

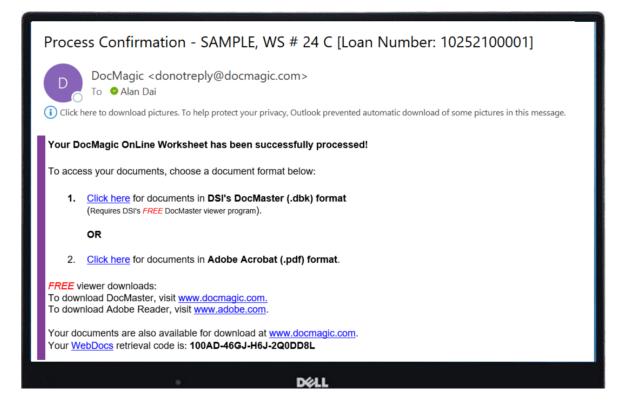
### Select "DBK (PCL)" under File Format.





#### Opening a DBK File With DocMaster

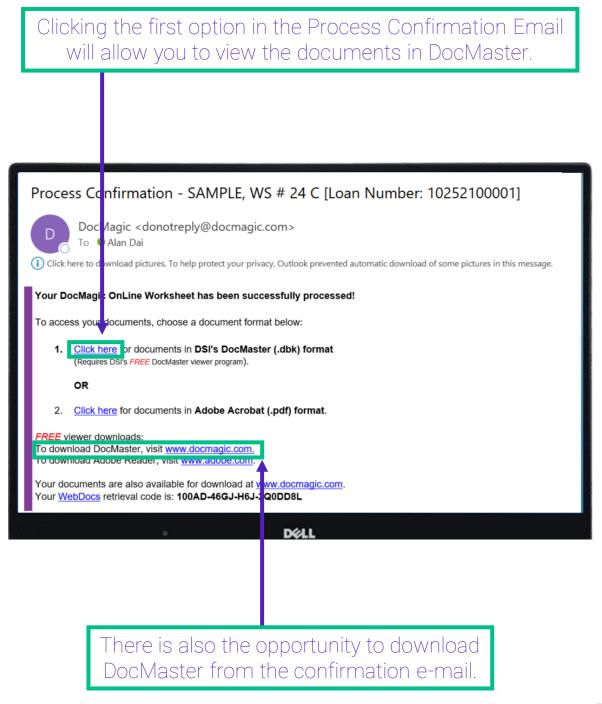
You can view the package in DocMaster by accessing the process confirmation e-mail.



Some loan origination software include a DBK viewing option.



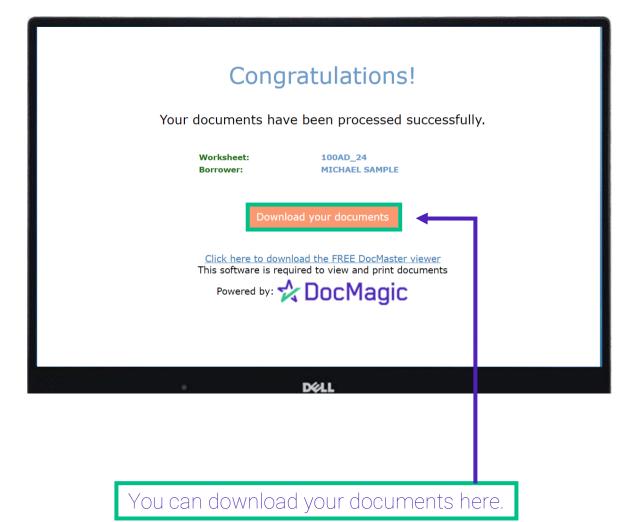
#### Opening a DBK File With DocMaster





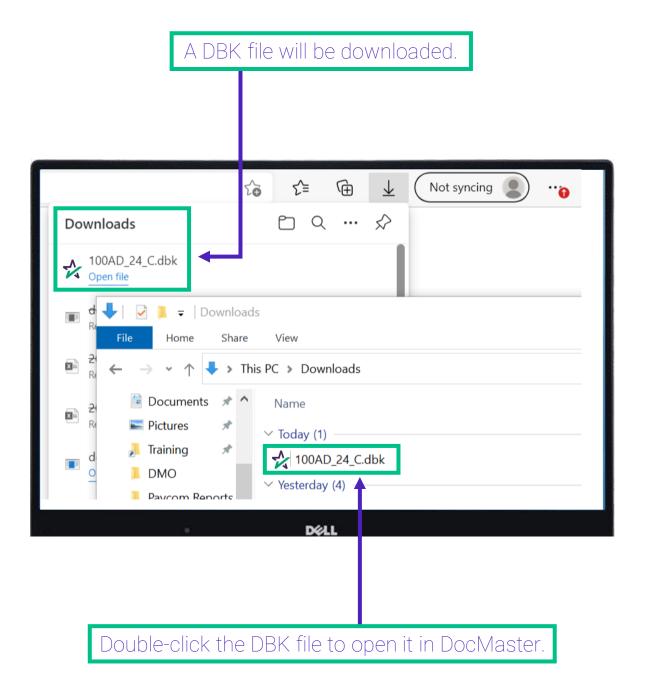
Opening a DBK File With DocMaster

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





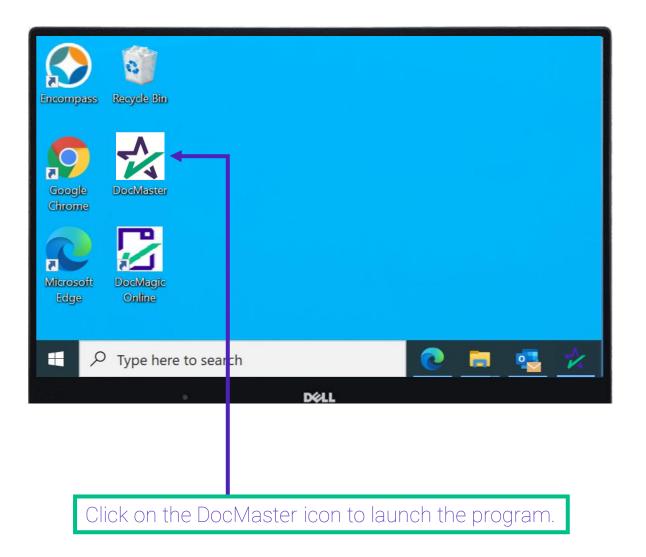
#### Opening a DBK File With DocMaster





#### Opening a DBK File With DocMaster

You can also open DocMaster without opening a DBK file.





#### Opening a DBK File With DocMaster

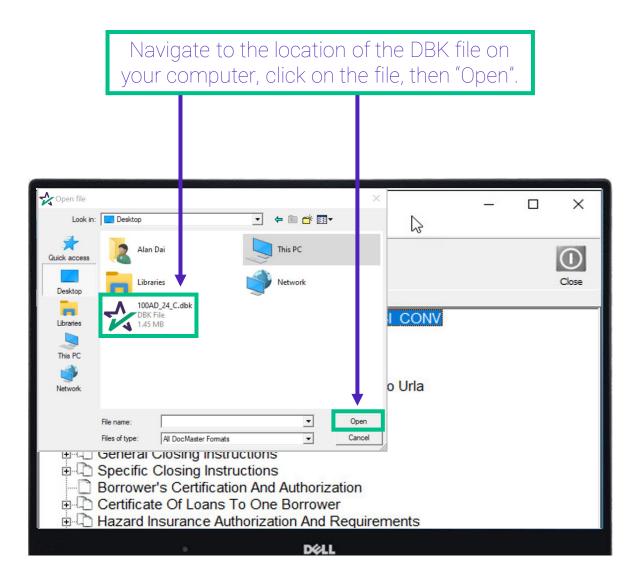
With DocMaster running, you may open any DBK files saved to your computer.

*	DocMaster - BORROWR ON	E SAMPLE		-	×
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	Open	Ctrl+0			$\mathbf{O}$
<b></b>	WebDocs	Ctrl+W			Close
	Save				
	Save As		Plan: 100BO_DSI_CONV		
	Save Selected				
	Save Stacking Order		plication		
	Delete Stacking Order		ship Addendum To Urla		
	Print	>			
	View	>	ty Rider		
	eDelivery	>			
	Attach file		Authorization		
	Exit		Borrower		
	Prog nazaru insurance	Aumonza	tion And Requirements		
	0		DØLL		
	r	Erom	DocMaster, click		
		IUIIL			

"File", then "Open".

\*

#### Opening a DBK File With DocMaster



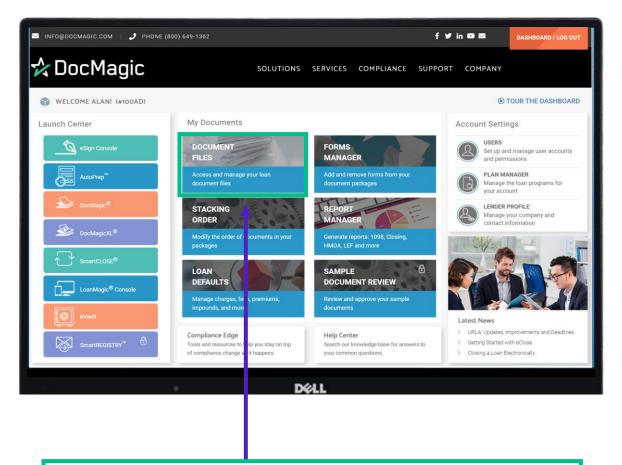
DBK files received via e-mail should be saved to your computer and opened using this method.



### 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

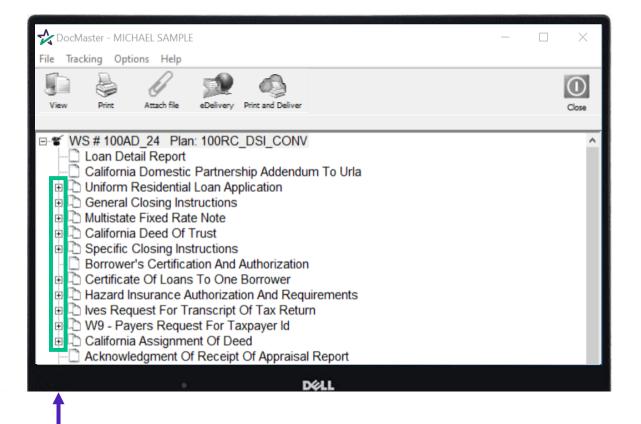
The DocMaster button allows you to review documents, send them as e-disclosures, and as secure email closing documents.

🛧 DocMagi	ic	SOLUTIONS SERVIC	ES COMPLIANCE	SUPPORT COMPANY	DASHBOARD
Show 10 v entries	ırch:				
WORKSHEET #	LOAN #	BORROWER	MODIFIED	🔷 ТҮРЕ	ACTION
1	100420210001	NED NEEDS NOTARY SAMPLE	03-18-2022 4:13:56 PM	IntegratedDisclosure (Sele	sted) 🔀 🗟 🗈 🗟
1	100420210001	NED NEEDS NOTARY SAMPLE	03-17-2022 2:20:38 PM	IntegratedDisclosure (Selec	cted) 🛃 🖓 🖻 🕞 🕞
10	202110010002	BILLY BORROWER SAMPLE	10-01-2021 3:51:18 PM	Closing	A 🖓 🖓 🦕
11	202110010003	BILLY BORROWER SAMPLE	10-01-2021 3:52:05 PM	Closing	A
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	<mark>😪</mark> = 🗅 🗟
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#### Form Access

Double click on a form to open it.

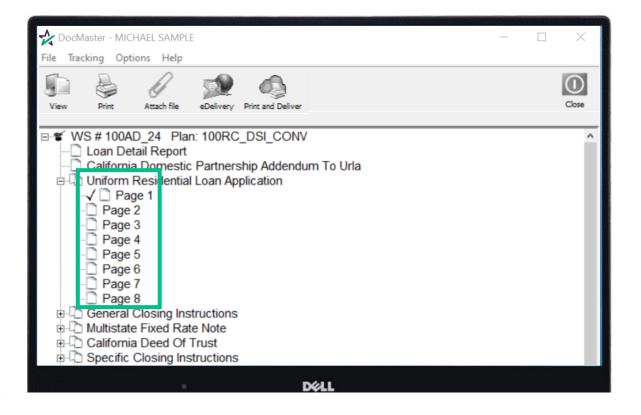


The "+" to the left of the form indicates there's more than one page to the form.



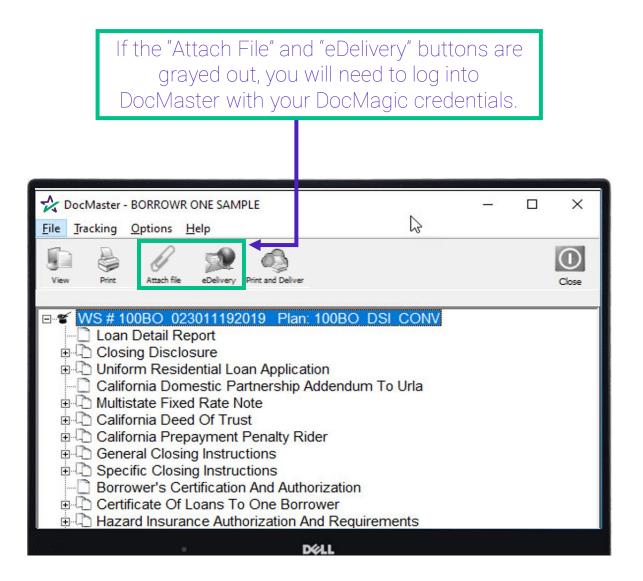
#### Form Access

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



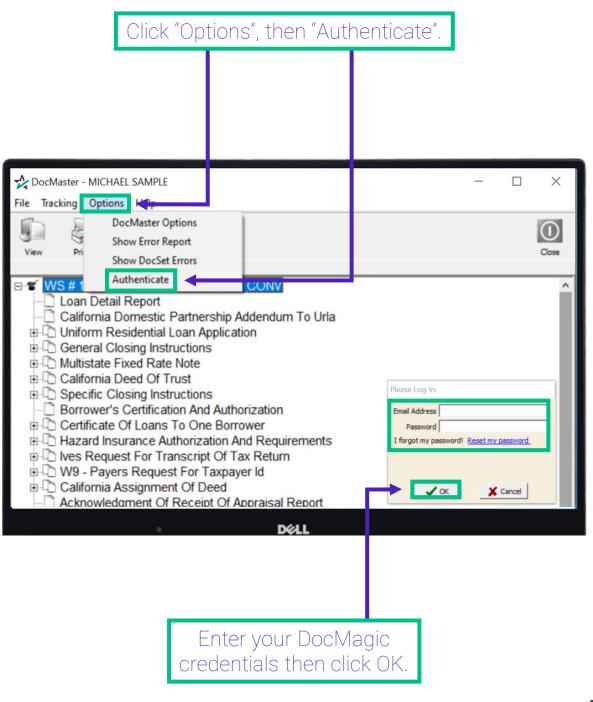


Authentication





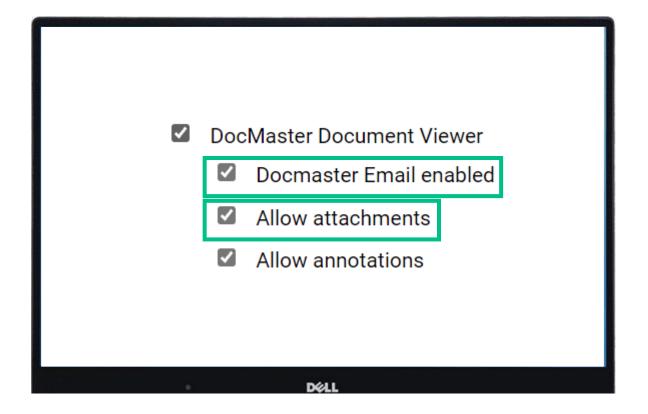
#### Authentication





Authentication

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





#### Black vs. Red font

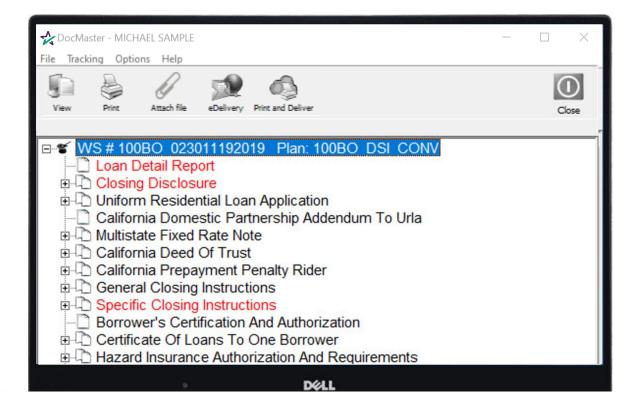
When you first process a package and view the documents in DocMaster (DBK format), all fonts will be black.

CocMaster - MICHAEL SAMPLE —	$\times$
File Tracking Options Help	
View Print Attach file eDelivery Print and Deliver	() Close
<ul> <li>WS # 100AD_24 Plan: 100RC_DSI_CONV</li> <li>Loan Detail Report</li> <li>California Domestic Partnership Addendum To Urla</li> <li>Uniform Residential Loan Application</li> <li>General Closing Instructions</li> <li>Multistate Fixed Rate Note</li> <li>California Deed Of Trust</li> <li>Specific Closing Instructions</li> <li>Borrower's Certification And Authorization</li> <li>Certificate Of Loans To One Borrower</li> <li>Hazard Insurance Authorization And Requirements</li> <li>Ives Request For Transcript Of Tax Return</li> <li>W9 - Payers Request For Taxpayer Id</li> <li>California Assignment Of Deed</li> <li>Acknowledgment Of Receipt Of Appraisal Report</li> </ul>	~
Déll	



Black vs. Red font

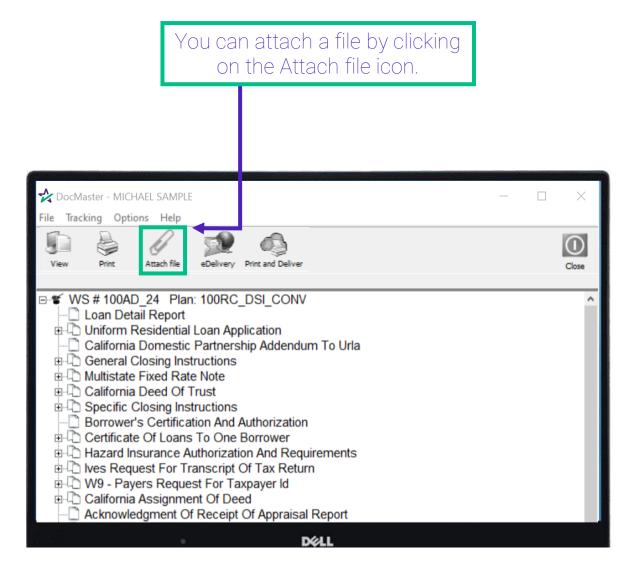
If changes are made to the package and it is reprocessed, the titles of the forms affected by the new data will appear in red.



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



#### How to Attach a File





#### How to Attach a File

	Newly attached forms will appear at the bottom of the list.					
					_	
DocMaster - MICHAEL S.						×
View Print Attach	,	t and Deliver				Close
- 🗋 Hardship Lette	greement tification Verificati r otice Credit Opportunity r ning Furnishing N	y Act Notice				^
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#### Annotation & Adding Text

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

DocMaster - MICHAEL SAMPLE —	$\times$
File Tracking Options Help	
View Print Attach file eDelivery Print and Deliver	Close
WS # 100AD_24 Plan: 100RC_DSI_CONV California Domestic Partnership Addendum To Urla California Domestic Partnership Addendum To Urla California Domestic Partnership Addendum To Urla California Residential Loan Application California Deed Of Trust California Deed Of Trust California Deed Of Trust Certificate Of Loans To One Borrower Certificate Of Loans To One Borrower Certificate Of Loans To One Borrower California Assignment Of Tax Return California Assignment Of Deed California Assignment Of Receipt Of Appraisal Report	
Start by opening the form that needs data added.	



#### Annotation & Adding Text

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Print Zoom In	Zoom Out Add	Text Del Text	Save				
This application is designed to be a sequence of the constraints of the sec- dentiality the forward's special ap- property rights parameter to date be accurrently papping rights para- state, or the Borrover is rolying on if this is an application for joint error	empleted by the applicant(6) with the four maat also be provided out the it to used as a basis for loan qualifi- will not be used as a basis for loan qualifi- ant to applicable law and Bernwer other property located in a comma	tation or L1 the iscome or assets in qualification, but his or her tail resides in a contenually property rity property state as a basis for	a should complete this I be income to enable of the Borrowor's spous disc must be considered abute, the security proper repayment of the lean.	e or other person whi i because the spous ty is located in a cor	o has community a or other person		
Borrower		Co-Borrower					
Montgauge VA & Course Applied for: PH4A Usin	t TVIE OF ( ontional D Other (oxplain): Offand op Service	ADREDUCED AND TREAM OF LOA Agency Gase Nambe		for Cana Number			
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Legal Description of Satject Proper THAN "7" LINES, PLEASE C	ty datach description if necessary) LICK ATTACHED? "Y" AND	TYPE LEGAL DESCRIPTIO THIS FIELD WILL GREY	XN HERE, IF LEGAL OUT.	IS LONGER	Your Buil		
Purpose of Loan	Construction C		perty voli be: Primary Residence 🗆 Se	oundary Residence	Investment		
Complete this line if construction of Yoar Lot Acquired S	ounstruction-permanent loan	Present Value of Lot (0) \$	Cost of Improvements	Total (s+ b) S			



#### Annotation & Adding Text

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

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Zoom In Zoom Out	Add Text Del Text	Save				
	п	niform Re	side	ntial Loar	n Applicatior	,
This application is designed						te this form as "Borrower" or "Co-Borrower,"
as applicable. Co-Borrower	information must a	lso be provided (and	the app	opriate box checke	d) when 🛛 the income of	or assets of a person other than the Borrower s spouse or other person who has community
property rights pursuant to	state law will not be	e used as a basis for	r Ioan qu	lification, but his o	r her liabilities must be co	nsidered because the spouse or other person y property is located in a community property
state, or the Borrower is rel	ying on other prope	rty located in a com	nmunity	roperty state as a l	basis for repayment of the	ə loan.
f this is an application for		er and Co-Borrower e	each agr	e that we intend to	apply for joint credit (sig	n below):
Just start ty	ping					
Borrower				Co-Borrower		
		Other (explain):		GAGE AND TERMS Agency Case		Lender Case Number
Applied for: FHA	USDA/Rural Housing Service					
Amount \$ 200,000.00	Interest Rate 3.750	No. of Months % 360	A	rtization Type:	K Fixed Rate	Other (explain):
	(D)			DØLL		



#### Annotation & Adding Text

	Click "Save" when done. The entered data will stay on the form unless deleted.						
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nt Zoom In Zoor	m Out Add	Text Del Text	Save				
		Un	iform Res	identia	al Loan	Application	
as applicable. Co- (including the Born property rights pur has community pro	Borrower info rower's spous rsuant to stat operty rights	ormation must also ae) will be used as a te law will not be u pursuant to applica	be provided (and th basis for loan qualifi sed as a basis for lo able law and Borrowe	e appropriate ication or an qualificat er resides in a	box checked the income of on, but his or community pr	when the income or rassets of the Borrower's her liabilities must be con	e this form as "Borrower" or "Co-Borrower," assets of a person other than the Borrower spouse or other person who has community sidered because the spouse or other person property is located in a community property loan.
lf this is an applica			nd Co-Borrower eac	h agree that	we intend to a	apply for joint credit (sign	below):
Borrower				Co-B	prrower		
	FHA D	Conventional USDA/Rural Housing Service	I. TYPE OF Other (explain):		AND TERMS C Agency Case		Lender Case Number
Amount		Interest Rate 3.750 %	No. of Months 360	Amortizatio	n Type:	Fixed Rate	Other (explain):
\$ 200,000.00							
				1			() [9] [9]



#### WebDocs Code

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

ocMaster - MICHAEL SAMPLE		— 🗆 X
Tracking Options Help		
Open	Ctrl+O	0
WebDocs	Ctrl+W	Close
Save		
Save As		CONV
Save Selected		dendum To Urla
Save Stacking Order		n
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View	>	zation
eDelivery	>	ver I Requirements
Attach file		Return
Exit		ld
Acknowledgment Of R	eceipt Of Ap	opraisal Report
		Dell
_		
	Start b	y clicking on "File",
	Open WebDocs Save Save As Save Selected Save Stacking Order Delete Stacking Order Print View eDelivery Attach file Exit Acknowledgment Of R	Tracking Options Help   Open Ctrl+O   WebDocs Ctrl+W   Save   Save As   Save Selected   Save Stacking Order   Delete Stacking Order   Print   View   >   eDelivery   Attach file   Exit   Chrl+W   Ctrl+W

then "WebDocs".



#### WebDocs Code

	Docs Code "Submit".
DocMaster - MICHAEL SAMPLE	– – ×
View Print Attach file eDelivery Print and Deliver	Close
WebDocs Code: sample webcode  WebDocs Code: sample webcode  California Deed Of Trust California Deed Of Trust California Deed Of Trust California Closing Instructions Certificate Of Loans To One Borrower California Construction And Require California Assignment Of Tax Return California Assignment Of Deed California Assignment Of Receipt Of Appraisal	

Copy paste is recommended to ensure accuracy.



#### Saving a Selected Form in a Package





#### Saving a Selected Form in a Package

To utilize the "Save Selecte function, start by left clicking the form you would like to sa	on
⊷ DocMaster - MICHAEL SAMPLE	- 🗆 X
File Tracking Options Help	Close
<ul> <li>WS # 100AD_24 Plan: 100RC_DSI_CONV</li> <li>Loan Detail Report</li> <li>California Domestic Partnership Addendum To Urla</li> <li>Uniform Residential Loan Application</li> <li>General Closing Instructions</li> <li>Multistate Fixed Rate Note</li> <li>California Deed Of Trust</li> <li>Specific Closing Instructions</li> <li>Borrower's Certification And Authorization</li> <li>Certificate Of Loans To One Borrower</li> <li>Hazard Insurance Authorization And Requirements</li> <li>Ives Request For Transcript Of Tax Return</li> <li>W9 - Payers Request For Taxpayer Id</li> <li>California Assignment Of Deed</li> <li>Acknowledgment Of Receipt Of Appraisal Report</li> </ul>	



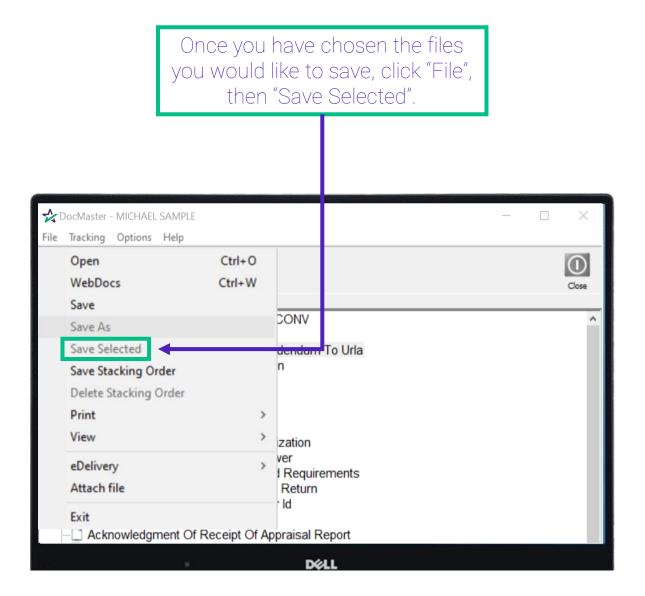
#### Saving a Selected Form in a Package

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

DocMaster - MICHAEL SAMPLE File Tracking Options Help	- 🗆 X
View Print Attach file eDelivery Print and Deliver	Close
WS # 100AD_24 Plan: 100RC_DSI_CONV   California Domestic Partnership Addendum To Urla   Uniform Residential Loan Application   General Closing Instructions   Multistate Fixed Rate Note   California Deed Of Trust   Specific Closing Instructions   Borrower's Certification And Authorization   Certificate Of Loans To One Borrower   Hazard Insurance Authorization And Requirements   Ves Request For Transcript Of Tax Return   W9 - Payers Request For Taxpayer Id   California Assignment Of Deed   Acknowledgment Of Receipt Of Appraisal Report	
Déll	



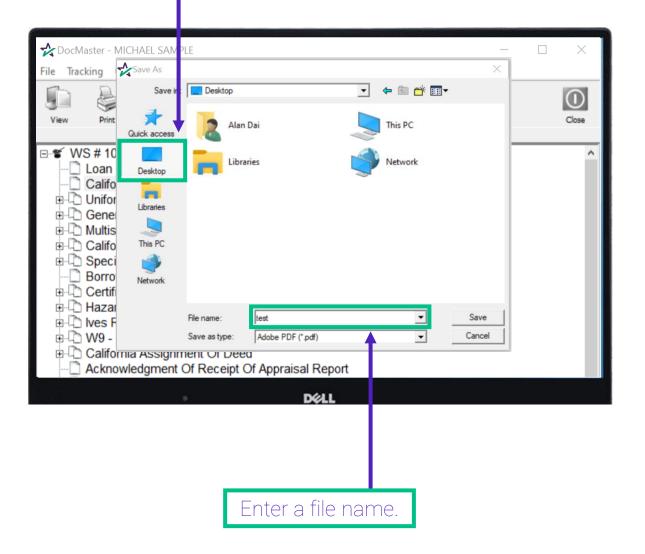
#### Saving a Selected Form in a Package





#### 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.





#### 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".

	100	States and the states of the s				COLUMN TWO IS NOT	Statement of the local division of the local	States and its	The rest of the local division of the local
<b>☆</b> D	ocMaster - N	MICHAEL SAMP	LE				_		×
File	Tracking	Save As					×		
1		Save in:	Desktop		•	🗢 🖹 📑 🗉	•		
		4							Close
Viev	w Print	Quick access	2 Alan	Dai		This PC			Close
- <b>*</b>	WS # 10								^
	- 🗋 Loan	Desktop	Librar	ries		Network			
	Califo	-							
Đ	- 🗋 Unifor	Libraries							
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÷.	Speci								
	Borro								
	Certif								
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	-12 Ives F -12 W9 -		Save as type:	Adobe PDF (*.pdf)		-	Cancel		
				1					
+		mia Assignii wledament (		) Of Appraisal Re	port				
. ľ		wiedgment		Appraisal Re	μοπ				
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#### How To Print

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

*	DocMaster - MICHAEL SAM	PLE	- 0	$\times$
File	Tracking Options Help	þ		
	Open	Ctrl+O		$\square$
	WebDocs	Ctrl+W		Close
	Save			Close
	Save As		DSI_CONV	^
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	Save Stacking Order		plication	
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	eDelivery	>	Print Changed	
	Attach file		Print Remaining	
	Exit		Printer Setup Ctrl+S	- 11
E		uest For 1 ment Of D	Taxpayer Id	
		"Prir	nt All" prints everything.	



#### How To Print

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

and the second second		and the second		STREET, SQUARE,		 -		COLUMN TWO IS NOT
*	DocMaster - MICHAEL SAMPLE	E				_		$\times$
File	Tracking Options Help							
	Open C	Ctrl+O						$\square$
	WebDocs C	Ctrl+W						
	Save							Close
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	Delete Stacking Order		ship Addendum To Urla					
	Print	>	Print All		1			
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	Attach file		Print Remaining					
	Exit		Printer Setup C	trl+S				
-	wes request For II	anscrip	Of Tax Return					
	🗅 🗅 W9 - Payers Reque							
E	California Assignment Of Deed							
	Acknowledgment O	f Receip	ot Of Appraisal Report					
			DELL					

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



#### 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.

CocMaster - MICHAEL SAMPLE		- 🗆 X
File Tracking Options Help		
Open Ctrl+O WebDocs Ctrl+W Save		Close
Save As Save Selected Save Stacking Order Delete Stacking Order	2_DSI_CONV oplication ship Addendum To Urla	^
Print	Print All	
View	Print Selected	
eDelivery Attach file	Print Changed Print Remaining	
Exit	Printer Setup Ctrl+S	
	Taxpayer Id Deed	
	DELL	

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



#### 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.

🛠 DocMaster - MICHAEL SAMPLE	– 🗆 ×	
File Tracking Options Help		
Open Ctrl+O WebDocs Ctrl+W Save		Close
Save As Save Selected Save Stacking Order Delete Stacking Order	DSI_CONV plication ship Addendum To Urla	^
Print >	Print All	
View >	Print Selected	
eDelivery > Attach file	Print Changed Print Remaining	
Exit	Printer Setup Ctrl+S	
California Assignment Of Received and the second seco	Taxpayer ld Deed	
	DELL	



#### How To Print

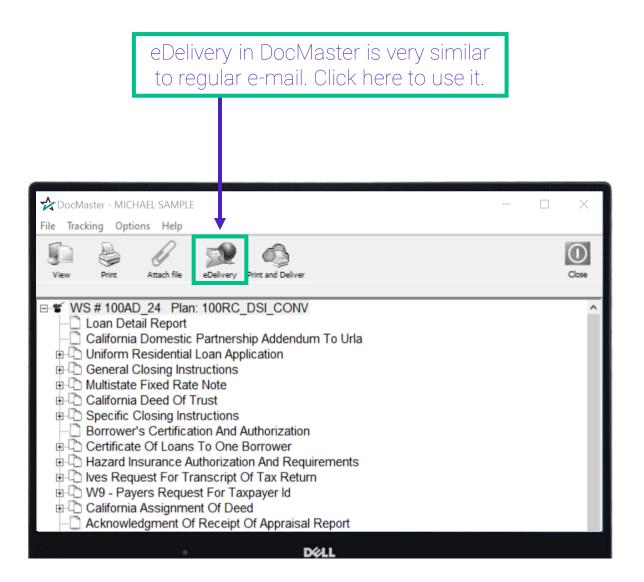
	You can also print by clicking on the Print icon.	
CocMaster - MICHAEL SAMPLE		□ ×
File Tracking Options Help	eDelivery Print and Deliver	Close
WS # 100AD_24 Plan: Coan Detail Report Conform Residential L Coalifornia Domestic F Coalifornia Closing Instru- Coalifornia Closing Instru- Coalifornia Fixed Rate	oan Application Partnership Addendum To Urla uctions	^
	uctions on And Authorization Fo One Borrower horization And Requirements	
<ul> <li>Ives Request For Trai</li> <li>W9 - Payers Request</li> <li>California Assignment</li> <li>Acknowledgment Of F</li> </ul>	t For Taxpayer Id	

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.



eDelivery



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



eDelivery

	"Secure Link" is used for sending closing			
	packages and NOT for closing c			
	- MICHAEL SAMPLE			
-	Options Help gic eDelivery Service	×		
		^	Close	
	Type:         O DocMagic eSign         Secure Link           Options:         Signature Enable         Notary Enable         Inclu	ide SMARTDoc eNote	-	
Send	Security: Require Password			
		Advanced		
To:		<u> </u>		
Cc:				
Subject: Message:	DocMail for WebSheet 31, JOHN SMITH			
, nebboger		^		
		~		
	Description	Borrower#		
	DELL			
	These options will be areved or	It for Secure	Link	



eDelivery

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

	- MICHAEL SAMPLE	- 1	
1	agic eDelivery Service	×	0
Send	Type:       O DocMagic eSign       Image: Secure Link         Options:       Image: Signature Enable       Image: Notary Enable       Image: Image: Smart Compare Smar	- eNote	Close
	Advanced eDelivery Options	nced	
To:	Event Notification	•	
Cc:	Send Retrival Notifcation	-	
Subject:	Expires in 3 Days		
Message:	Disable Recipient Printing	^	
	Apply Watermark		
	Ok Cancel	~	
	Description Borrower#	Annotate	
	Déll		
	Select the number of days that the e-m will be available to the recipient before can no longer be accessed. Check the l	e it	

to turn on this option. The default is 3 days.



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.

	r - MICHAEL SAMPLE — Options Help	□ <u>×</u>
ጵ DocMa	agic eDelivery Service X	0
Send	Type:       O DocMagic eSign       Secure Link         Options:       Signature Enable       Nots // Enable       Include SMARTDoc eNote         Security:       Require Password       Advanced	Close
To: Cc:	<ul> <li>✓</li> </ul>	
Subject: Message:	DocMail for WebSheet 31, JOHN SMITH	
Г	Description Borrower# Annotate	

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



eDelivery

	With Secure Link, you'll have the option to enter information in these fields.				
File Tracking	- MICHAEL SAMPLE Options Help gic eDelivery Service			× (	
Send	Type:       O DocMagic eSign       Secure         Options: <ul> <li>Signature Enable</li> <li>Notary</li> <li>Security:</li> <li>Require Password</li> <li>Image: Security</li>       &lt;</ul>		ARTDoc eNote	Close	
To: Cc: Subject: Message:	DocMail for WebSheet 31, JOHN SMITH		•		
	Description	Borro	wer#		



### DocMagic eSign

	DocMagic eSign will allow the user to send the closing disclosure.		
	- MICHAEL SAMPLE -		×
-f -	gic eDelivery Service	<	0
 Send	Type:        • DocMagic eSign       • Secure Link        Options:        • Signature Enable           • Notary Enable         • Include SMARTDoc eNote	÷	Close
Selid	Security: Require Pass ford Advanced		
To:	aland@docmagic.com;strui t@docmagic.com;struitt@docmagic.com;NOTARY_EMAIL		
Cc: Subject:	eSign Invitation		
Message:	Jesign Invitation	-	
Г	Description Borrower#		
	DÓLL		
	Signature enable will allow the borrower to electronically sign the documents.		



#### DocMagic eSign

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

	- MICHAEL SAMPLE	_	
-f -	Options Help		
🛠 DocMa	agic eDelivery Service	X	$\bigcirc$
	Type:      OcMagic eSign     C Secure Link		Close
Send	Options: 🔽 Signature Enable 🗌 Notary Enable	Include SMARTDoc eNote	
	Security: 🔲 Require Password	Advanced	
To:	aland@docmagic.com;struitt@docmagic.com;struit	t@docmagic.con;NOTARY_EMAIL -	
Cc:			
Subject:	eSign Invitation		
Message:			
		× .	
	Description	Eprrower#	
	DØLL		

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



#### DocMagic eSign

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

	er - MICHAEL SAMPLE —	
	g Options Help	
	agic eDelivery Service X	0
	Type:      OccMagic eSign      C Secule Link	Close
Send	Options: 🔽 Signature Enable 🦳 Notary Enable 🦳 Include SMARTDoc eNote	
	Advanced eDelivery Options	
To:	▼ Event Notification loanofficer@docmagic.com ▼ ;NOTARY_EMAIL ▼	
Cc:	Send Retrival Notification	
	Expires in 3 Days	
Subject: Message:	Disable Recipient Printing	
Messaye:	Apply Watermark	
	Ok Cancel	
	Description Borrower#	

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.



#### DocMagic eSign

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

🛠 DocMaster -	MICHAEL SAMPLE	_	
File Tracking	Options Help		
<b>V</b>	Description	Borrower#	$\square$
~	Borrower's Certification, Authorization and Consent	1	Close
✓	Multistate Fixed Rate Electronic Note	1	
· ·	New Jersey Mortgage (MERS)	1	
~	New Jersey Addendum to Residential Mortgage Loan Application	1	
~	Uniform Residential Loan Application	1	
~	Addendum to Closing Instructions	1	
~	Specific Closing Instructions	1	
<b>v</b>	Hazard Insurance Authorization and Requirements	1	
~	IVES Request for Transcript of Tax Return	1	
~	Closing Disclosure	1	
~	Customer Identification Verification	1	
~	Initial Escrow Account Disclosure Statement	1	
~	New Jersey Initial Tax Authorization Notice	1	
~	New Jersey Private Well Testing Act Certification	1	
<b>v</b>	Signature Affidavit and AKA Statement	1	
	Dell		

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



#### DocMagic eSign

Cli	Click Send to send out the package when you're done.		
Т			
<b>₩</b> Dock aste	er - MICHAEL SAMPLE		$\times$
- i	a Options Help 1agic eDelivery Service	×	0
	Type:      O DocMagic eSign      O Secure Link		Close
Send	Options: 🔽 Signature Enable 🗌 Notary Enable	Include SMARTDoc eNote	
	Security: 🔲 Require Password	Advanced	
To:	aland@docmagic.com;struitt@docmagic.com;struitt	@docmagic.com;NOTARY_EMAIl 👻	
Cc:		<u>*</u>	
Subject: Message:	eSign Invitation		
messager		^	
		v	
Г	Description	Borrower#	
	• Déll		



#### Print and Deliver

