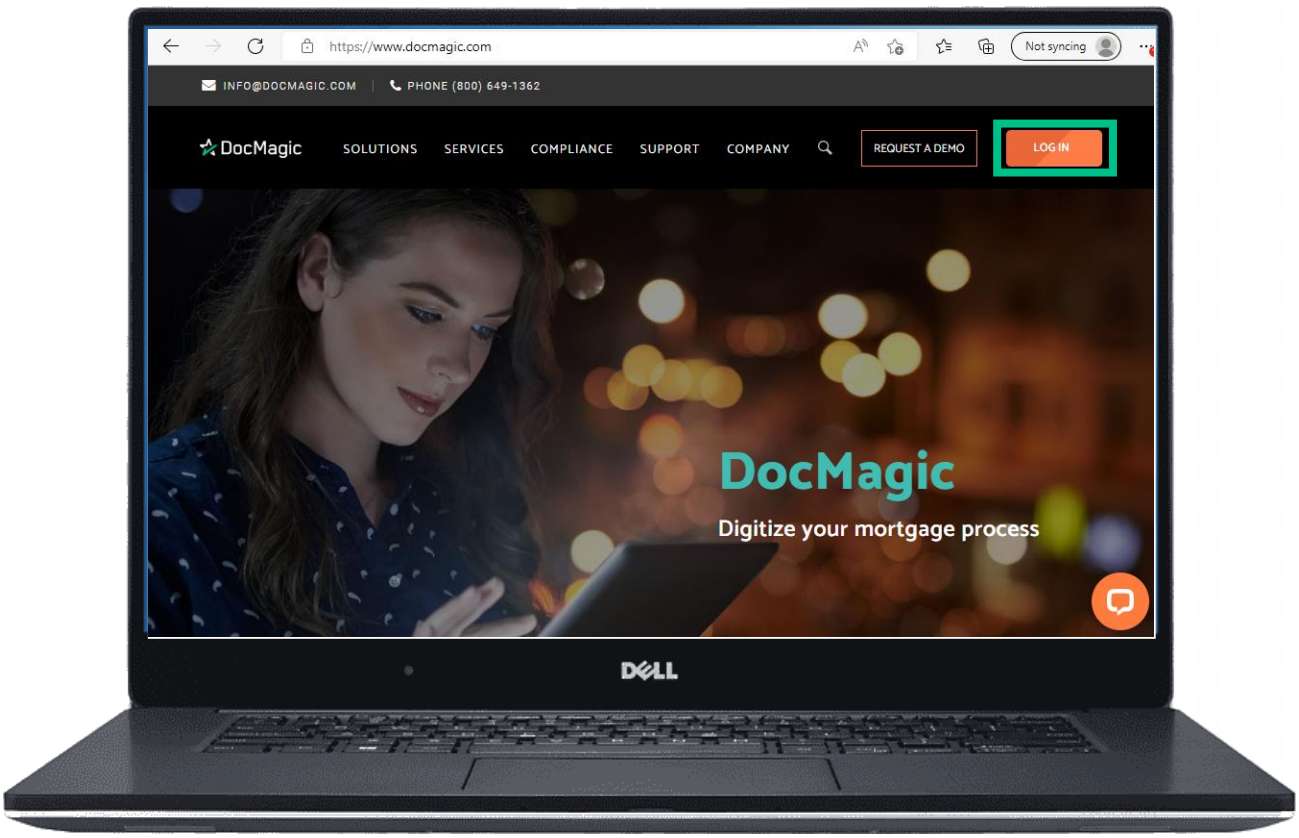
Document Files

Document Files

Navigating to Document Files

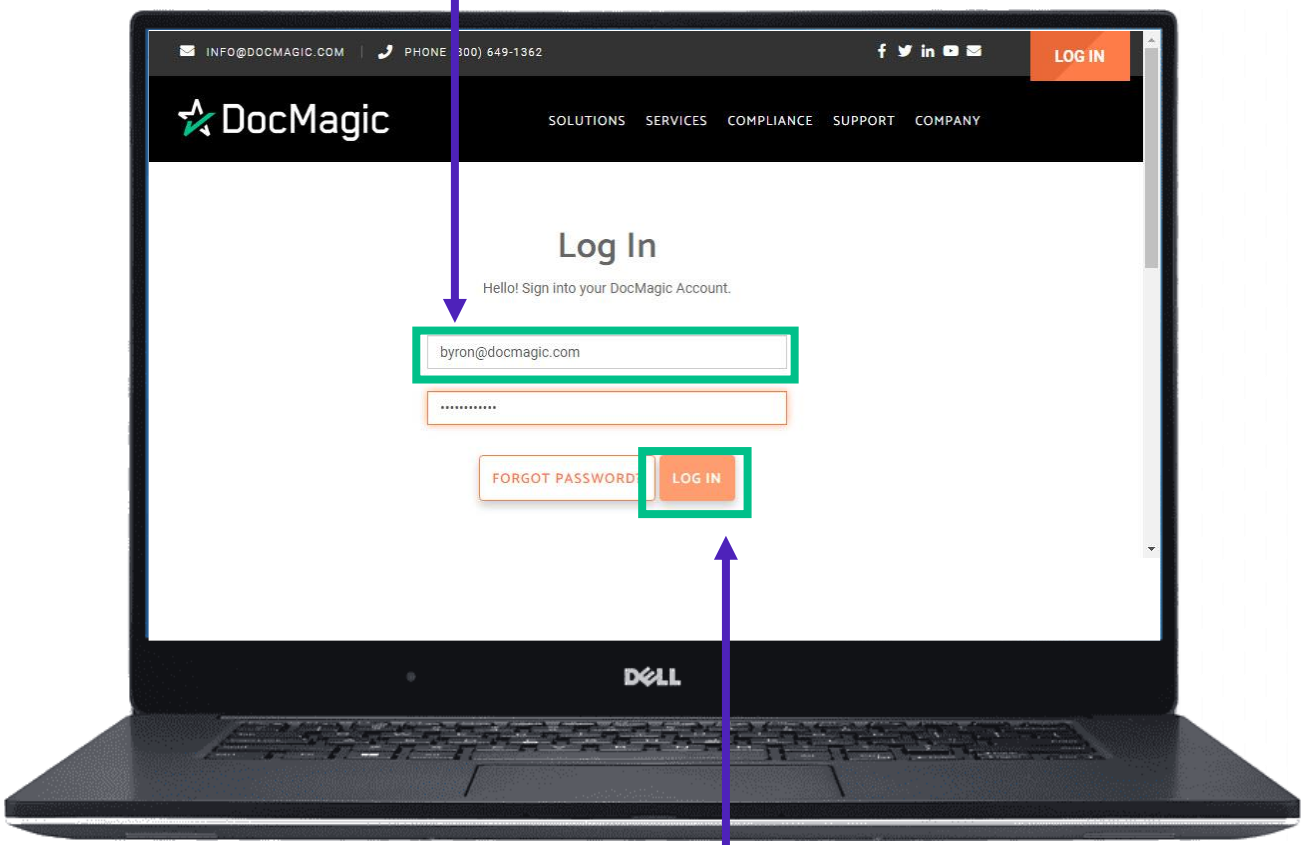
Go to www.docmagic.com



Document Files

Navigating to Document Files

Login with your email and password.

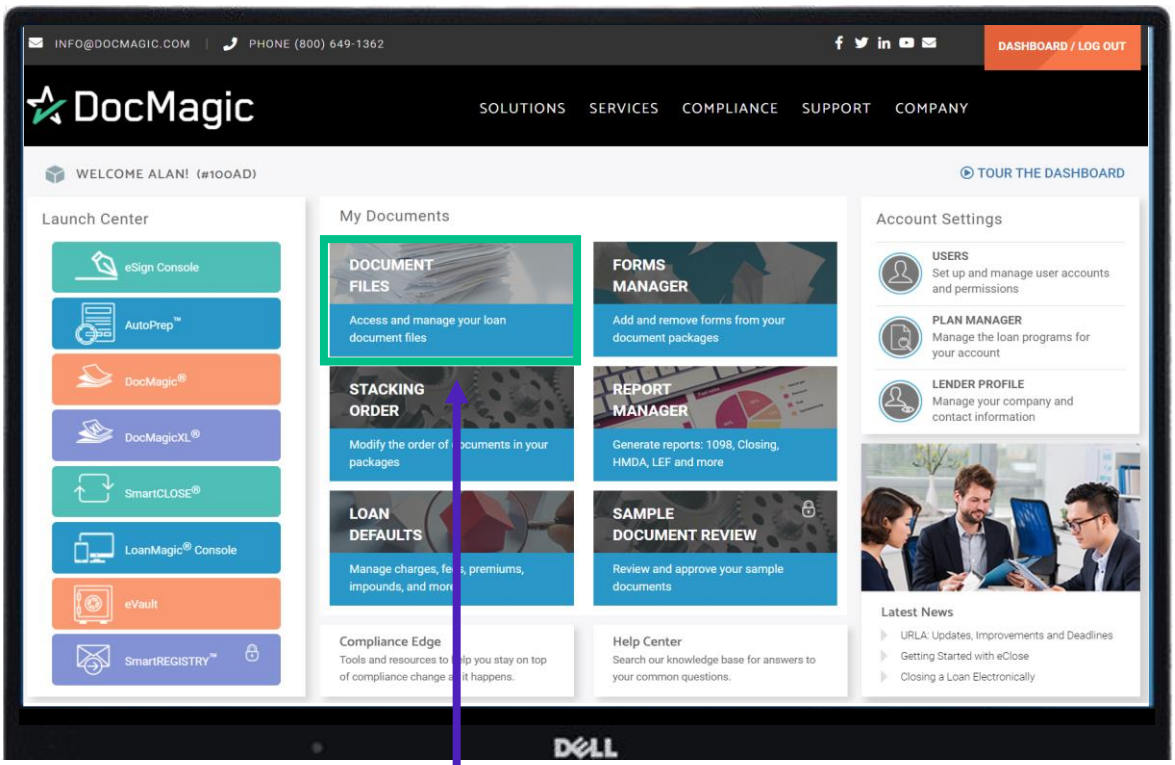


Click "LOG IN"

Document Files

Dashboard

From the Documents page, you can review the list of documents packages that were processed within the last 6 months as well as create and deliver the Uniform Closing Dataset (UCD) XML to Fannie Mae or Freddie Mac.

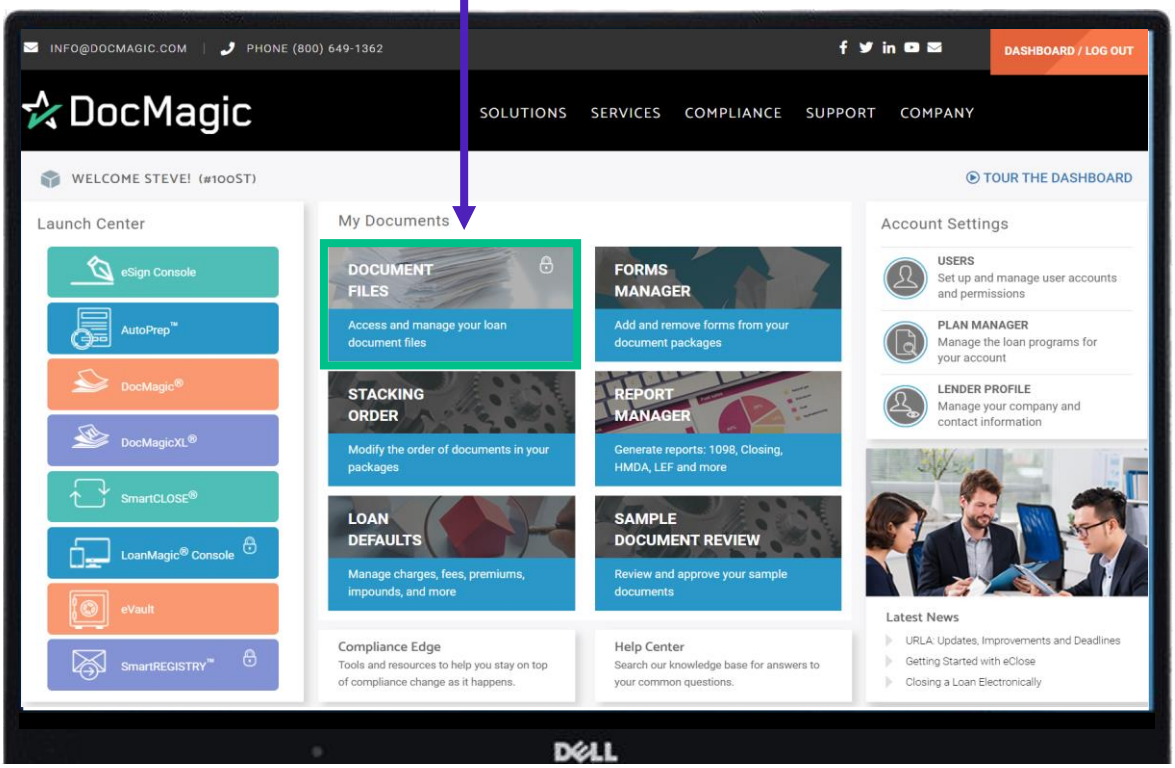


Click Document Files from the Dashboard to get started.

Document Files

Locked Out

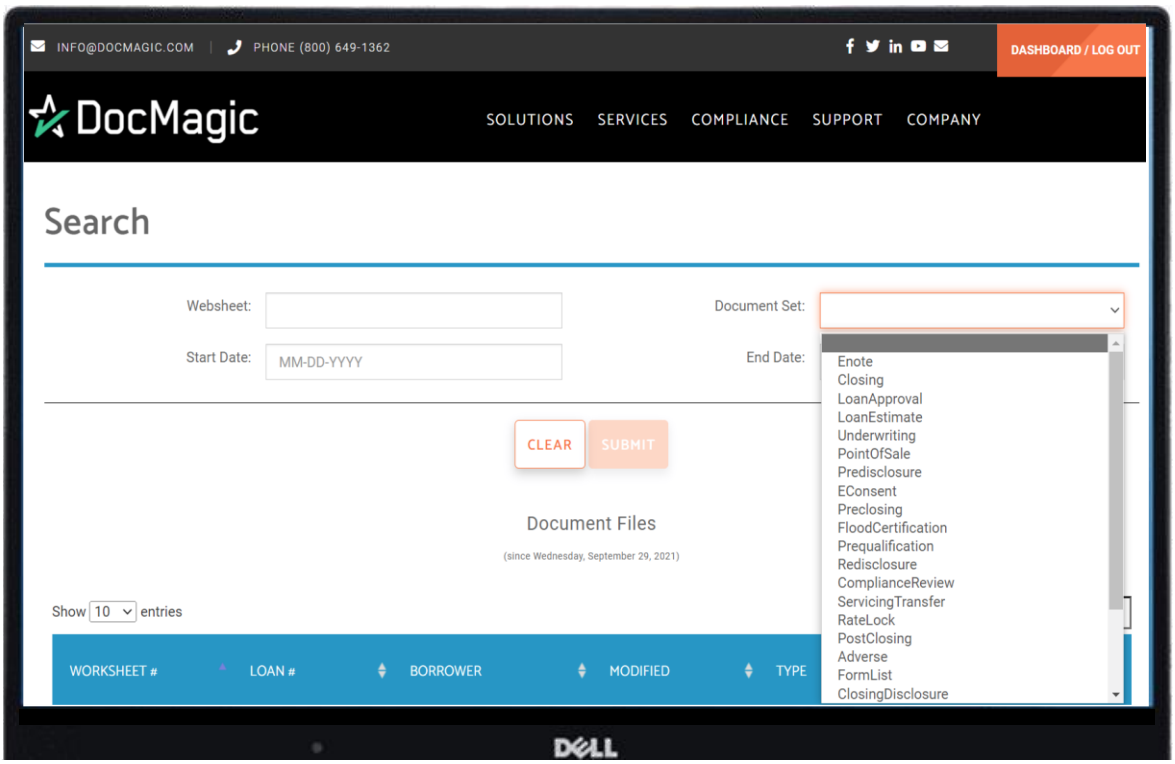
If a lock appears on the selection, you can't access the page and will have to speak with your DocMagic Administrator.



Document Files

Search

At the top of the page, you'll be able to search by DocMagic's websheet (worksheet) number, a date range, and specific document sets.

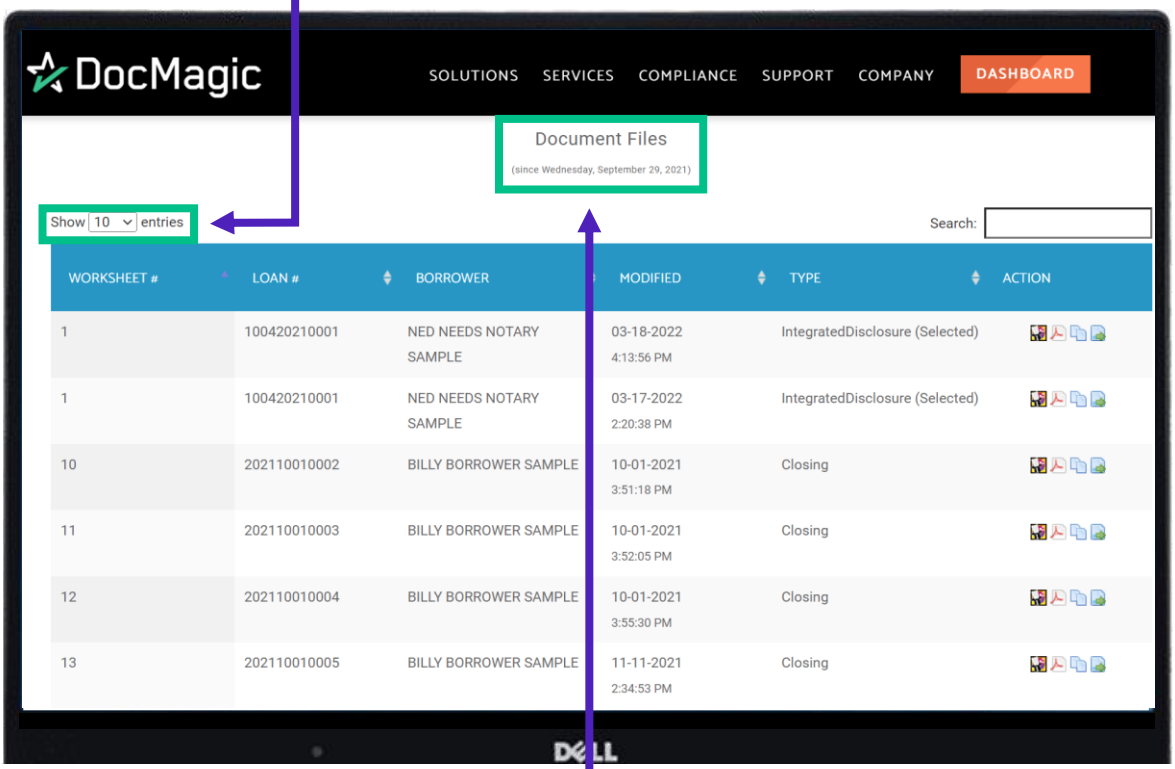


The Document Set drop down allows you to filter your search.

Document Files

Search

The "Show" drop down will let you see up to 100 files per page.

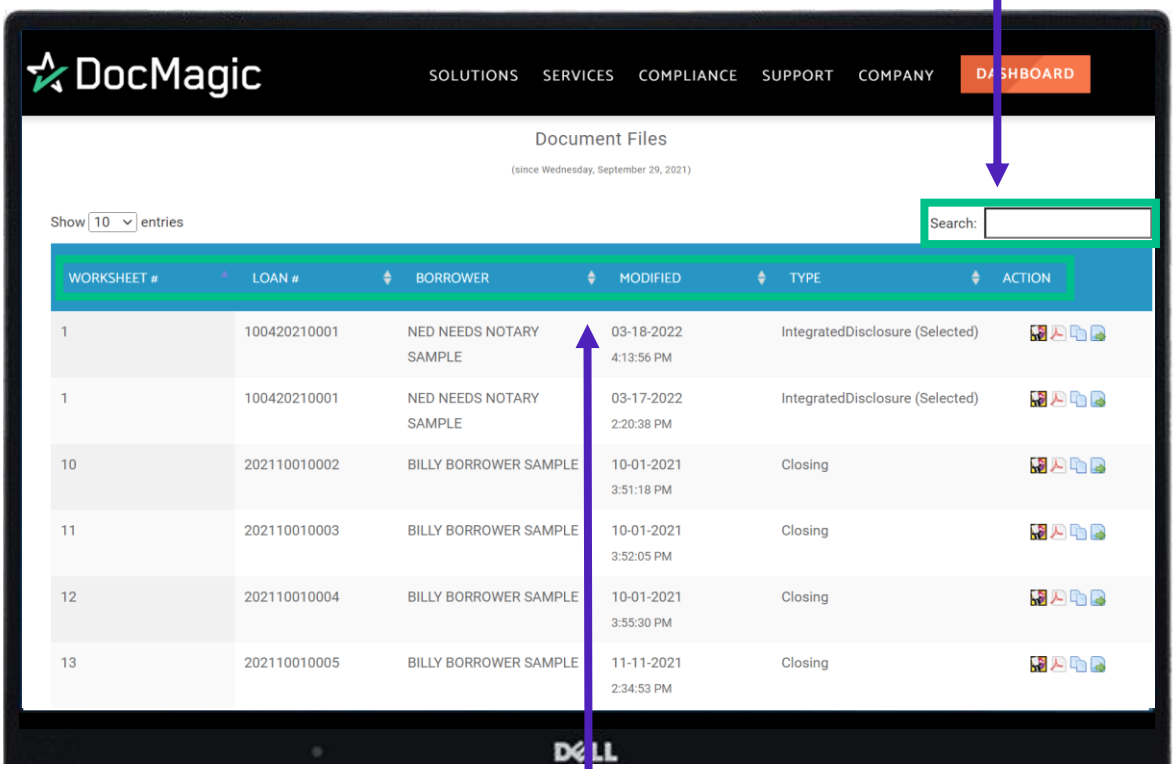


You will be able to view the last 6 months of processed loans.

Document Files

Search

Search using borrower name, loan #, worksheet #, package type or date.

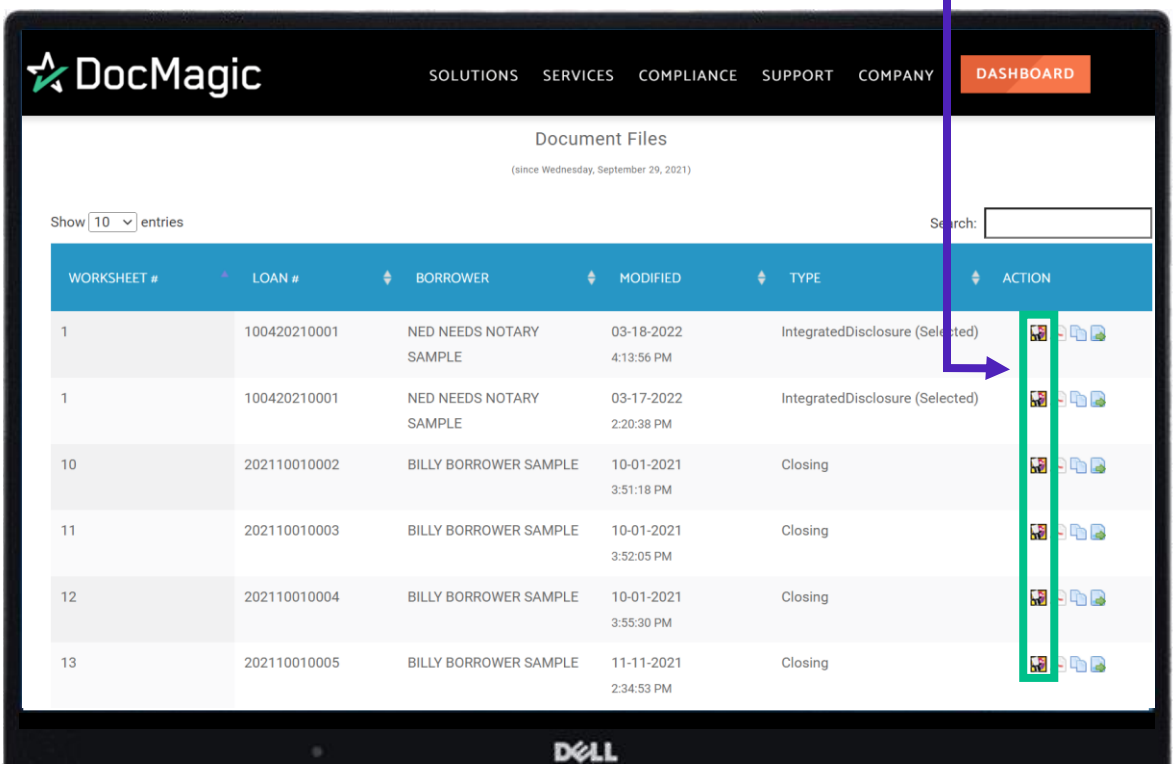


You can sort the files by clicking the arrows to the left of the headings in the blue shaded area below.

Document Files

Action Buttons

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

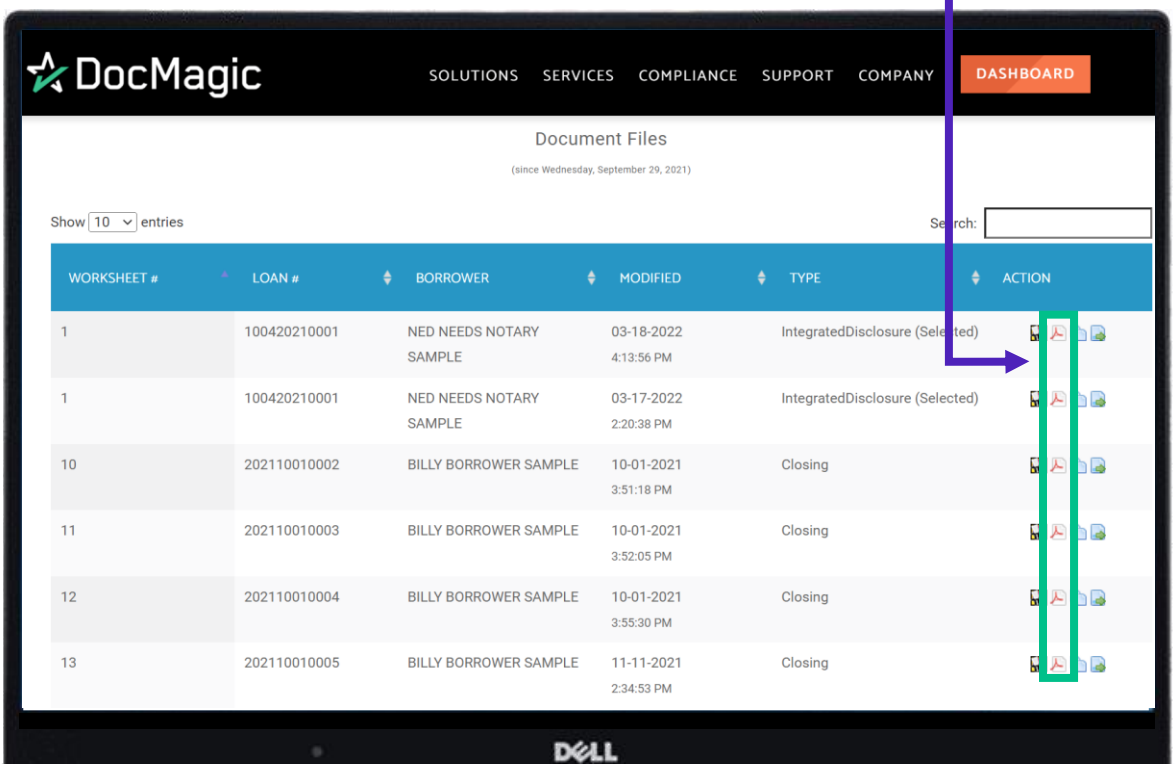


You will need to have the DocMaster software installed on your computer. Please see the DocMaster guide on our Product Training Page for details.

Document Files

Action Buttons

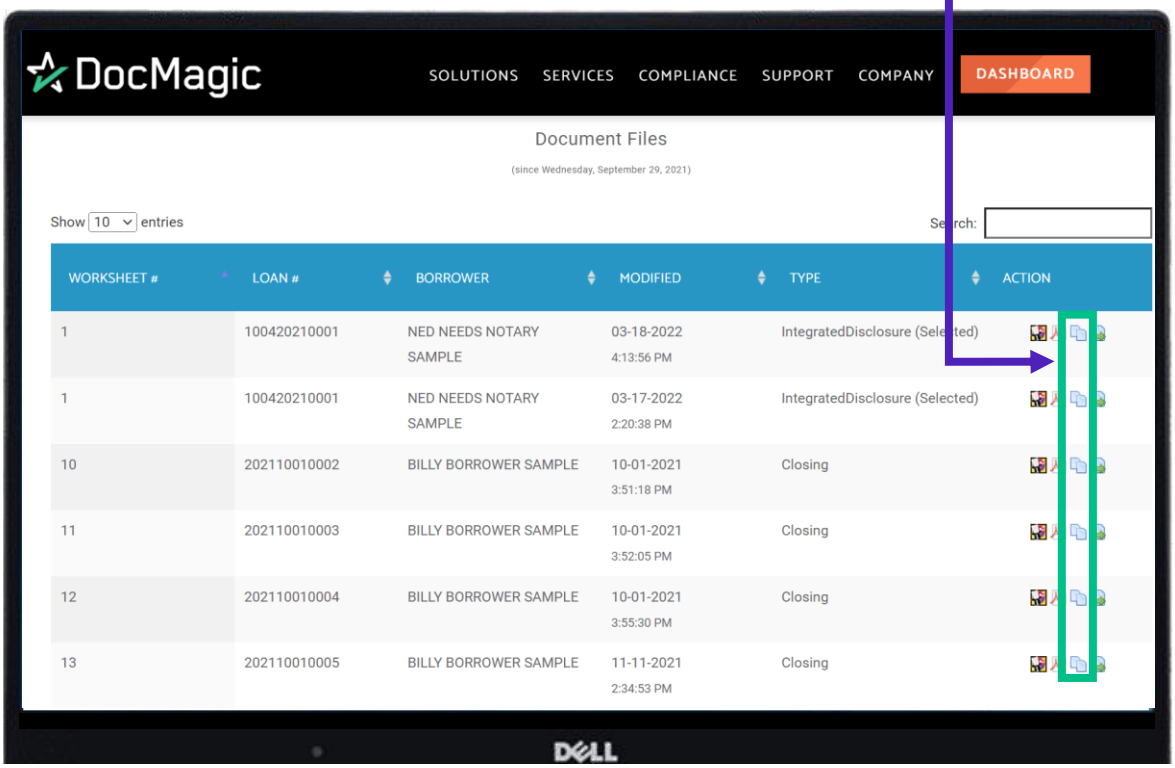
You can download review documents without DocMaster by clicking the PDF icon.



Document Files

Action Buttons

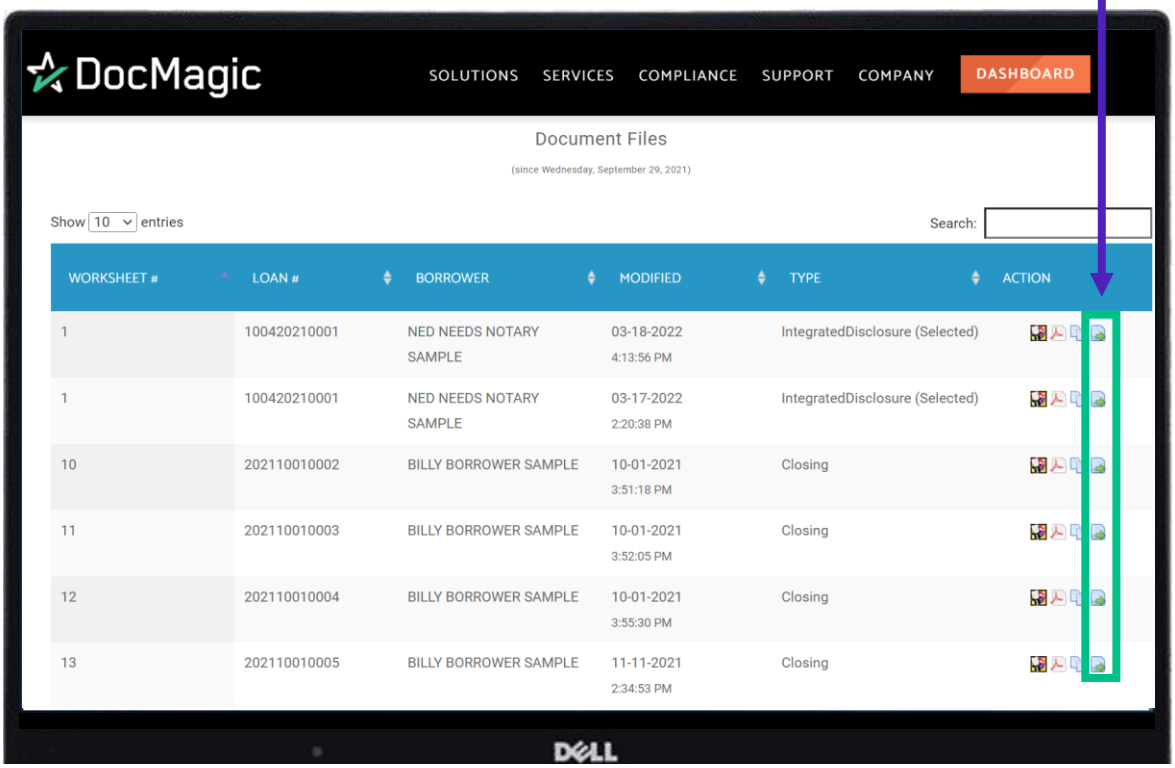
This Copy Webdocs Code to Clipboard button will allow you to paste the Webdocs code in the DocMaster software or somewhere else if needed.



Document Files

Action Buttons

The open green arrow indicates that the file contains a Closing Disclosure that can generate and deliver the UCD XML to a GSE (Fannie Mae/Freddie Mac).

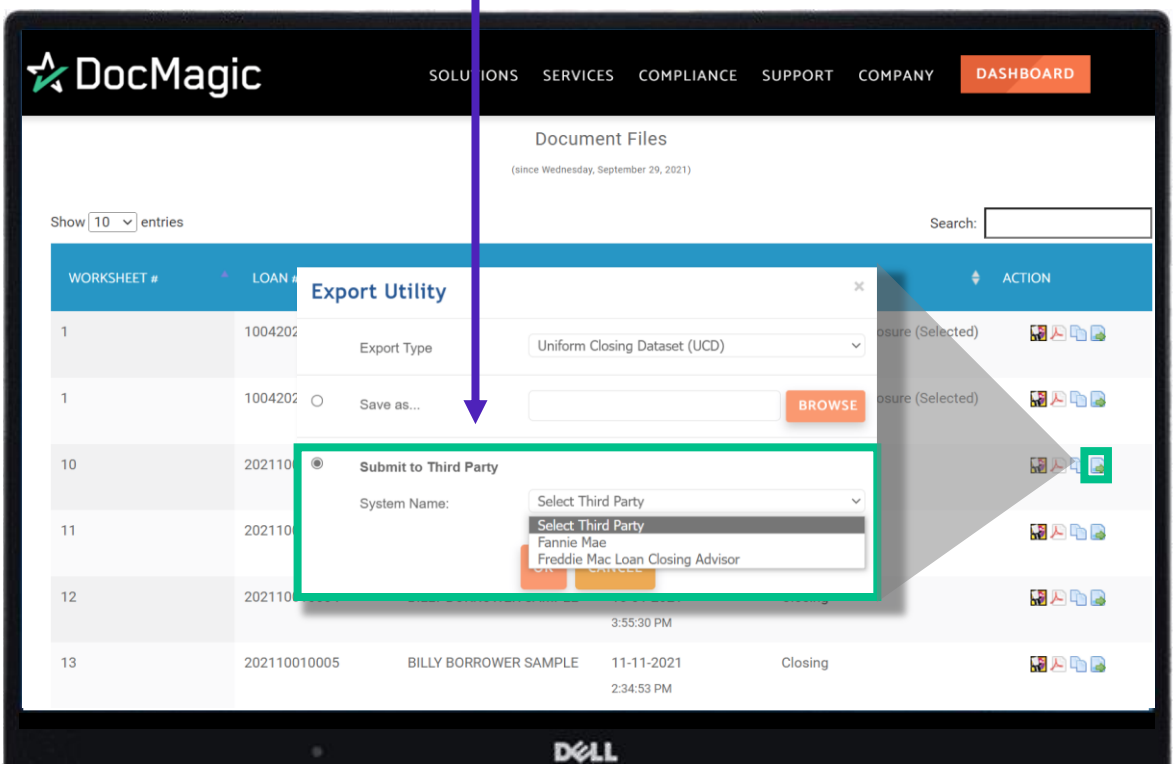


Packages that do not contain a Closing Disclosure will be greyed out – ensure that the icon is colored before trying to send a report to a GSE.

Document Files

Sending a UCD Report

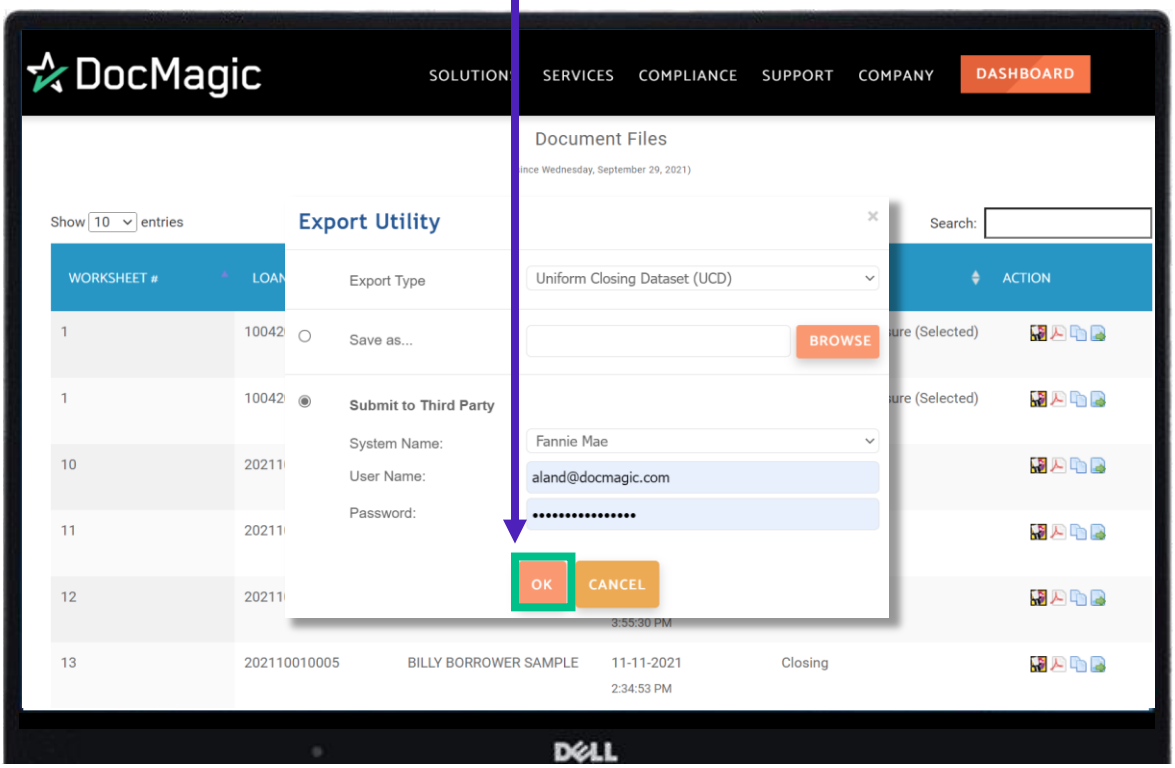
Select "Submit to Third Party" and choose your GSE from the drop down below.



Document Files

Sending a UCD Report

Login with the credentials used to access your GSE's website and click "OK" at the bottom of the window.

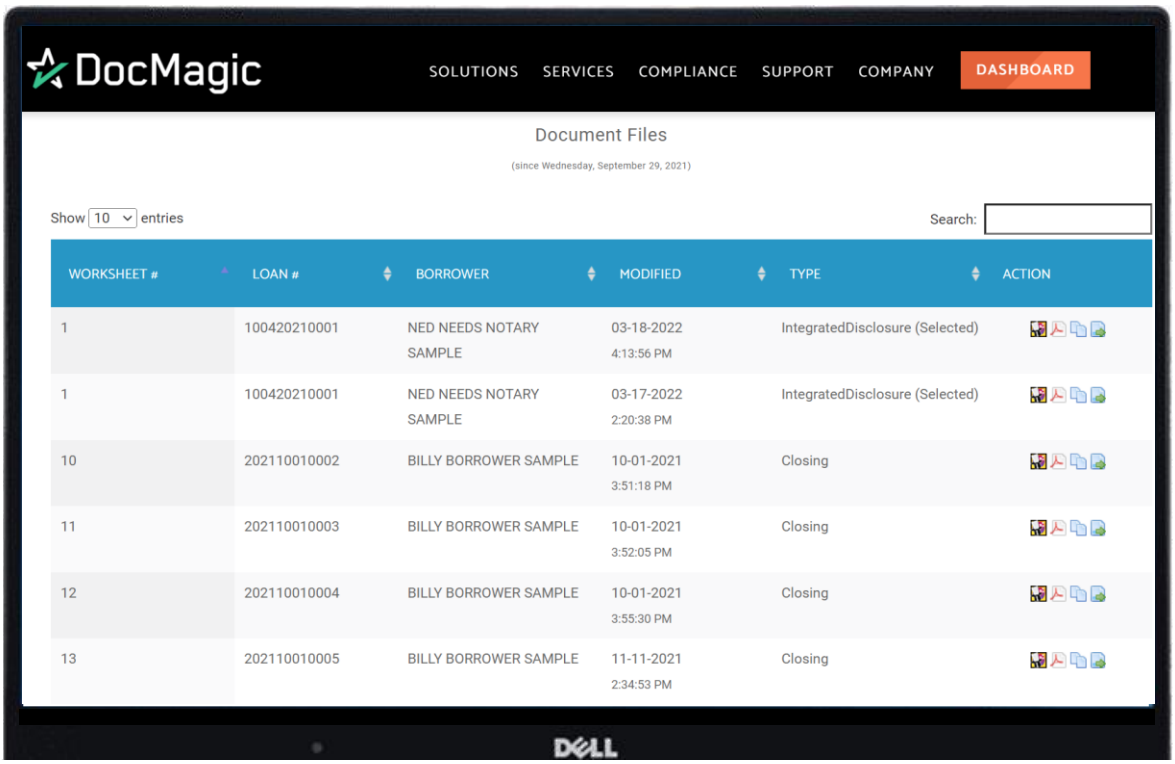


The UCD Report will be created and delivered to the GSE with the Closing Disclosure automatically embedded.

Document Files

Creating a UCD XML

If you're not using DocMagic to deliver the UCD report, you can still create the XML and embed the CD with DocMagic.

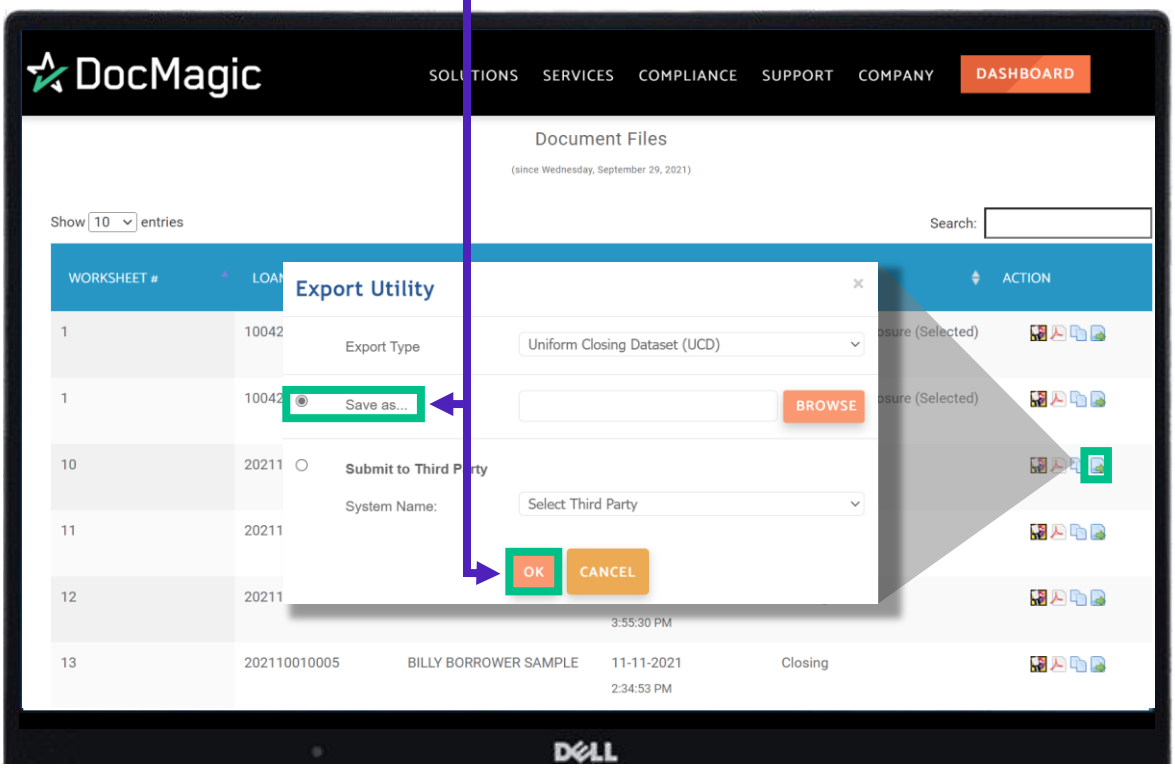


You must first process a loan package that contains a Closing Disclosure before you'll be able to access the green arrow action button for that Document File.

Document Files

Creating a UCD XML

Check "save as", then click "Ok" to create a UCD XML.

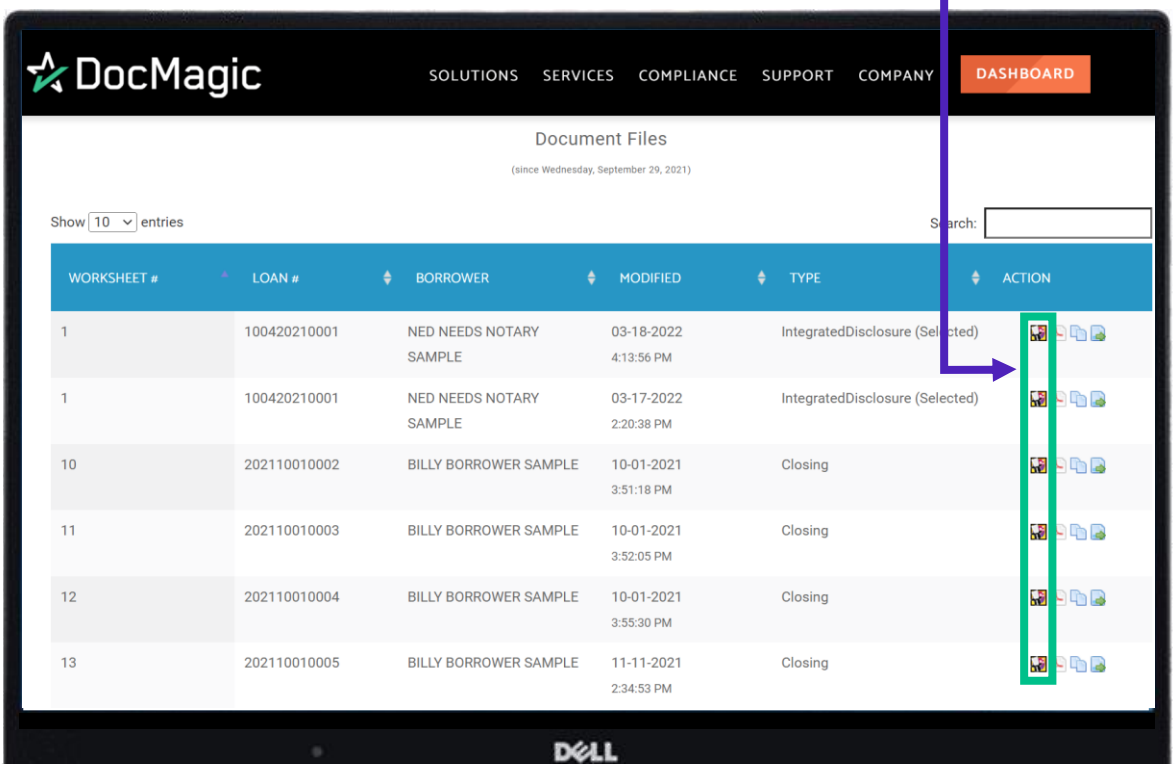


The XML can then be saved to your desktop or a folder of your choice.

Document Files

Creating the Closing Disclosure PDF

In the same loan that you ran the UCD XML, the CD can be saved as a PDF from the list of forms in DocMaster – Click on the DocMaster button.

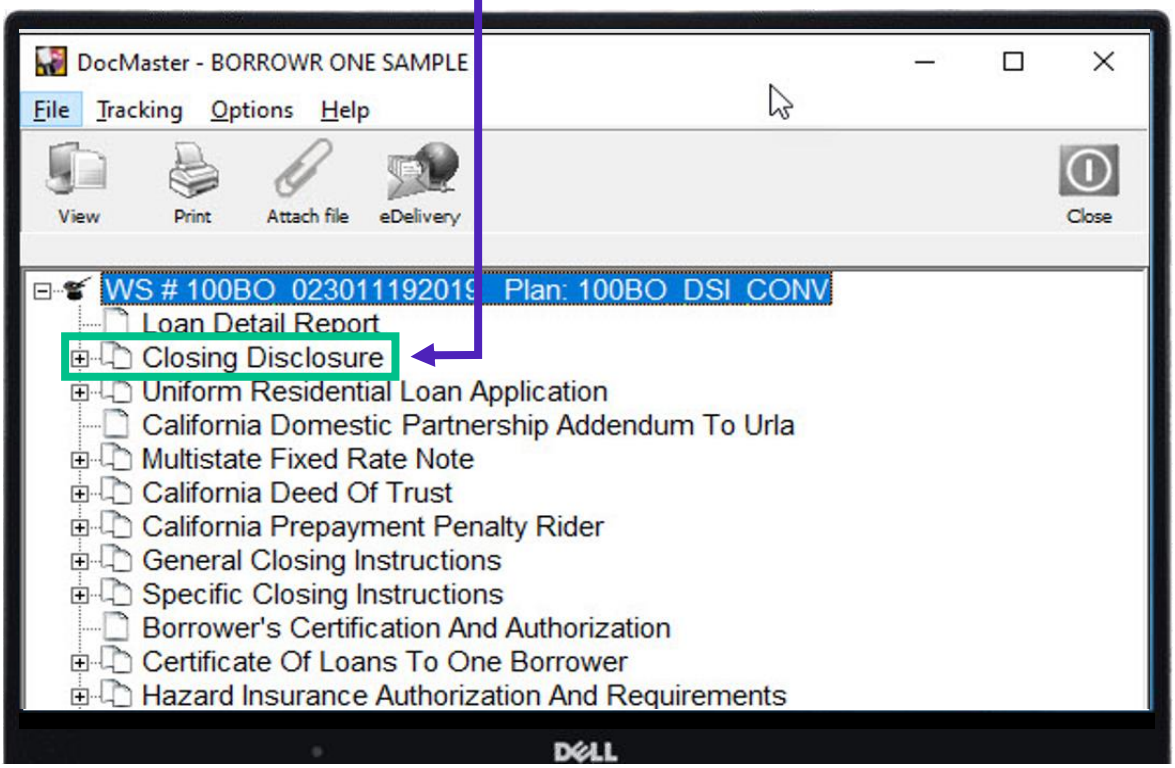


You must have DocMaster installed your computer. For more information about DocMaster, click here.

Document Files

Creating the Closing Disclosure PDF

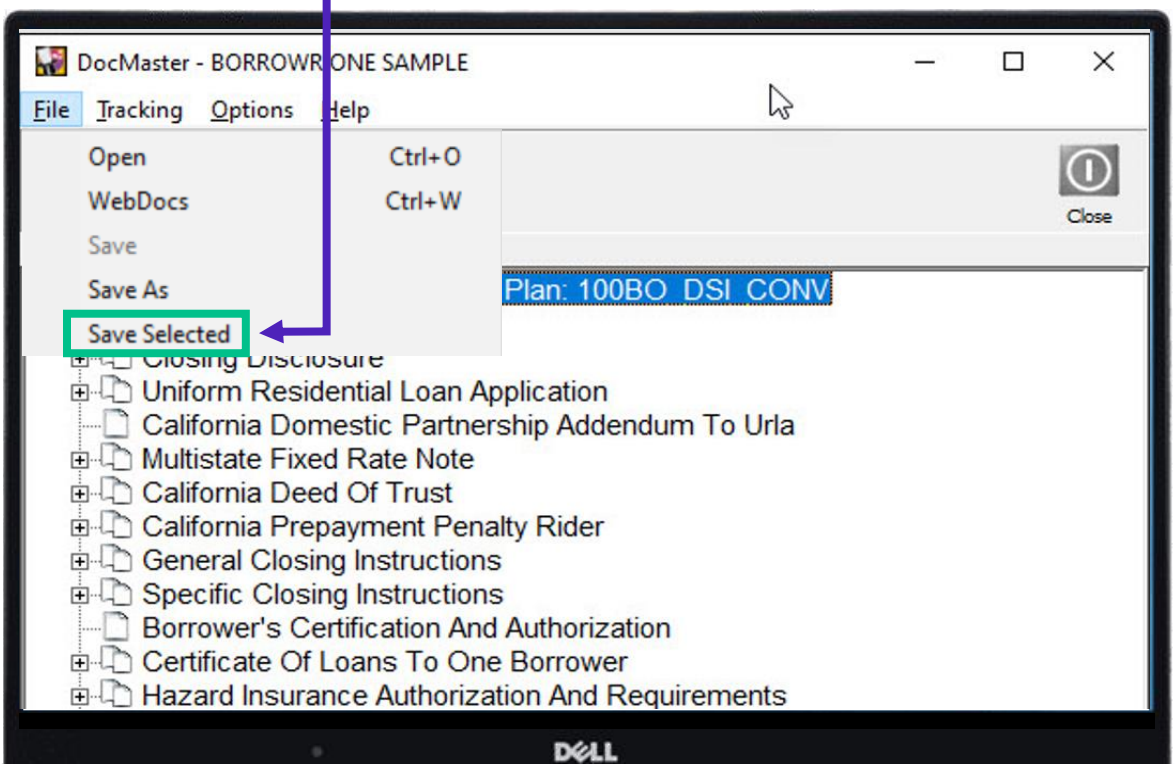
Open the file in DocMaster and click on the Closing Disclosure to highlight it.



Document Files

Creating the Closing Disclosure PDF

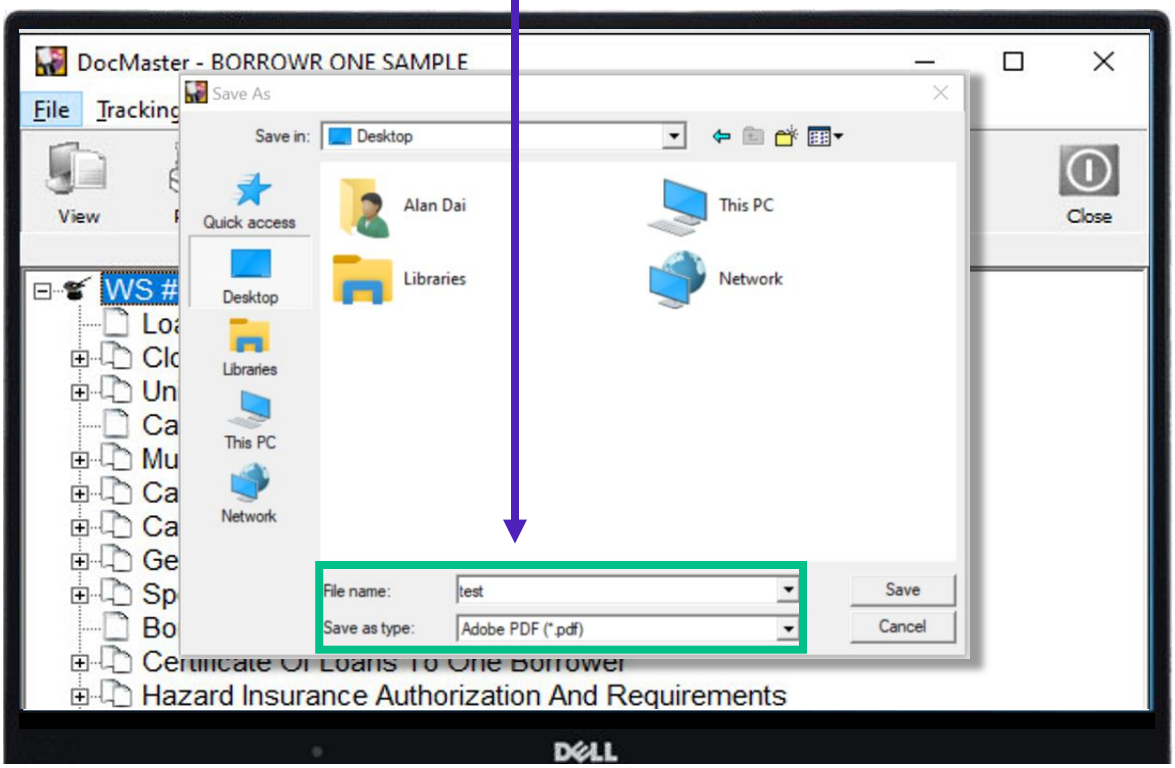
Click “File”, then “Save Selected”.



Document Files

Creating the Closing Disclosure PDF

Enter a File Name and select “Adobe PDF” from the “Save as type” drop down.



You now have your XML and Closing Disclosure to send to your GSE of choice.