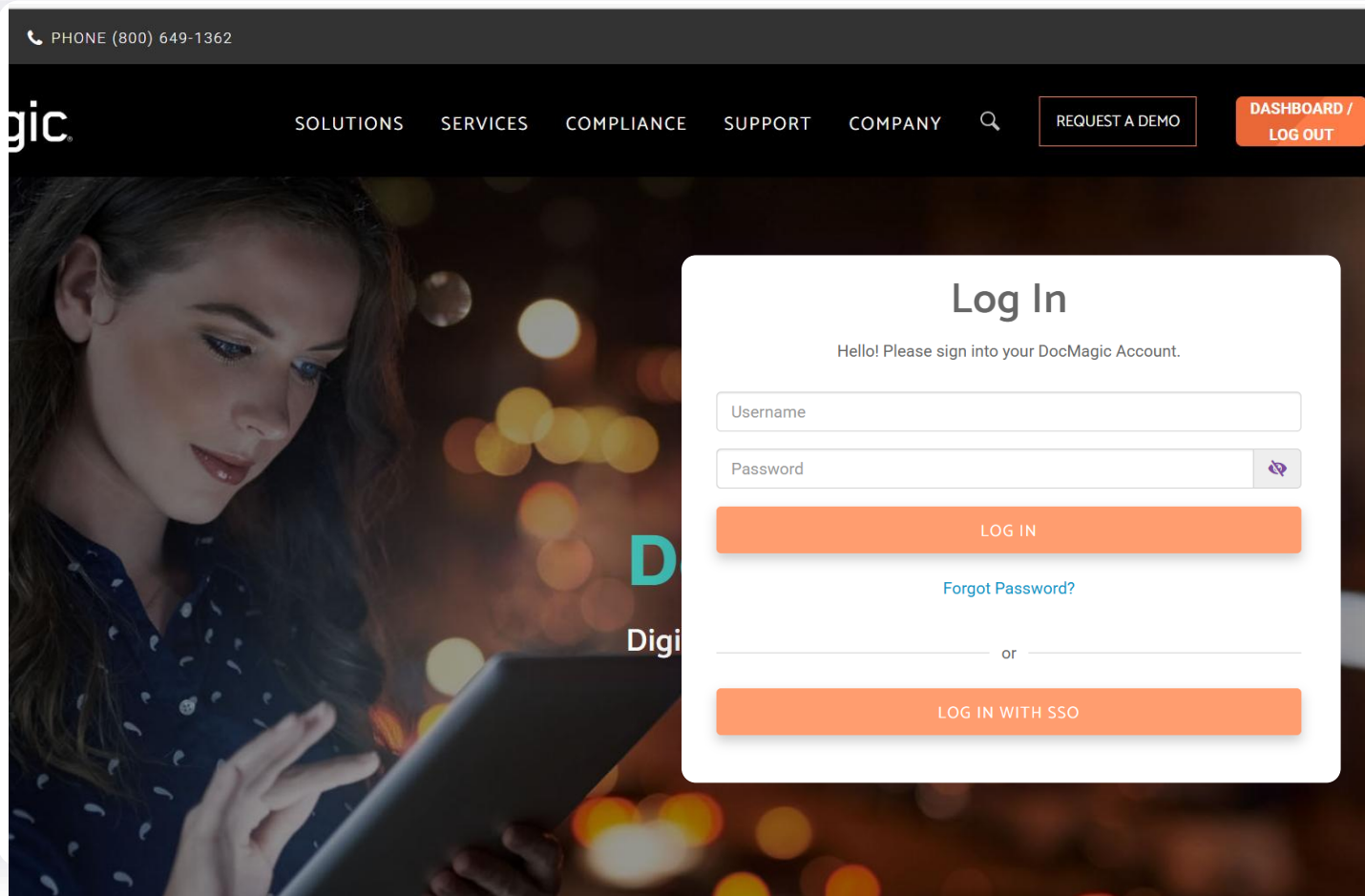


DocMagic Lender Experience

Getting Started



- DocMagic's Lender Experience is centered around the DocMagic Dashboard.
- Navigate to www.docmagic.com and click on the orange button in the top right.
- Enter your user credentials, then log in.

Getting Started

The screenshot shows the DocMagic dashboard for a user named Alan. At the top, there is a navigation bar with the DocMagic logo, contact information (INFO@DOCMAGIC.COM and PHONE (800) 649-1362), and menu items: SOLUTIONS, SERVICES, COMPLIANCE, SUPPORT, and COMPANY. There are also buttons for 'REQUEST A DEMO' and 'DASHBOARD / LOG OUT'. The main content area is divided into several sections:

- Launch Center:** A vertical list of tool icons including eSign Console, AutoPrep™, DocMagic®, DocMagic® One, SmartCLOSE®, LoanMagic® Console, eVault, and SmartREGISTRY™.
- My Documents:** A grid of document management options: DOCUMENT FILES (Access and manage your loan document files), STACKING ORDER (Modify the order of documents in your packages), LOAN DEFAULTS (Manage charges, fees, premiums, impounds, and more), REPORT MANAGER (Generate reports: 1098, Closing, HMDA, and more), and SAMPLE DOCUMENT REVIEW (Review and approve your sample documents, marked with a lock icon).
- Support:** A section titled 'Support' with the text 'Let us help you get the most from DocMagic'. It includes links for 'Customer Support' (Log in and let us help you) and 'Product Training' (Get to know our products).
- Account Settings:** A section titled 'Account Settings' with a 'TOUR THE DASHBOARD' link. It includes: USERS (Set up and manage user accounts and permissions), PLAN MANAGER (Manage the loan programs for your account), and LENDER PROFILE (Manage your company and contact information).
- Compliance Edge:** Tools and resources to help you stay on top of compliance change as it happens.
- Help Center:** Search our knowledge base for answers to your common questions.
- Latest News:** A list of news items: 'URLA: Updates, Improvements and Deadlines', 'Getting Started with eClose', and 'Closing a Loan Electronically'.

- Before we begin, please note that there are detailed reference guides for every DocMagic Product, Service, and Integration on our [Product Training Page](#). Hover over **Support** in the top ribbon of the website and select **Product Training**. The materials on this page are constantly updated, so please check back regularly!
- Please also note that you may not have access to everything on the dashboard – denoted by a lock icon for certain items (Sample Document Review on image). You may have restricted user rights, or you may not require the product depending on your business needs.

Account Settings

The screenshot shows the DocMagic dashboard interface. At the top, there is a navigation bar with the DocMagic logo, contact information (INFO@DOCMAGIC.COM and PHONE (800) 649-1362), and menu items: SOLUTIONS, SERVICES, COMPLIANCE, SUPPORT, COMPANY, REQUEST A DEMO, and DASHBOARD / LOG OUT. Below the navigation bar, the dashboard is personalized for 'ALAN! (#100SALES)' and includes a 'TOUR THE DASHBOARD' link. The main content area is divided into several sections: 'Launch Center' with icons for eSign Console, AutoPrep™, DocMagic®, DocMagic® One, SmartCLOSE®, LoanMagic® Console, eVault, and SmartREGISTRY™; 'My Documents' with tiles for DOCUMENT FILES, FORM ANALYZER, STACKING ORDER, REPORT MANAGER, LOAN DEFAULTS, and SAMPLE DOCUMENT REVIEW; 'Account Settings' (highlighted with a purple border) containing 'USERS', 'PLAN MANAGER', and 'LENDER PROFILE'; and 'Latest News' with a list of articles.

- Let's start with *Account Settings* towards the top right.
 - Admins can create and manage [Users](#)
 - Add Loan Programs to your account through the [Plan Manager](#)
 - Enter key company information in the [Lender Profile](#)

My Documents

The screenshot shows the DocMagic dashboard interface. At the top, there is a navigation bar with the DocMagic logo, contact information (INFO@DOCMAGIC.COM and PHONE (800) 649-1362), and menu items: SOLUTIONS, SERVICES, COMPLIANCE, SUPPORT, COMPANY, and a search icon. There are also buttons for 'REQUEST A DEMO' and 'DASHBOARD / LOG OUT'. Below the navigation bar, the dashboard is personalized for 'ALAN! (#100SALES)' and includes a 'TOUR THE DASHBOARD' link. The main content area is divided into several sections: 'Launch Center' on the left with icons for eSign Console, AutoPrep™, DocMagic®, DocMagic® One, SmartCLOSE®, LoanMagic® Console, eVault, and SmartREGISTRY™; 'My Documents' in the center, which is highlighted with a blue arrow and contains sub-sections for DOCUMENT FILES, STACKING ORDER, LOAN DEFAULTS, FORM ANALYZER, REPORT MANAGER, and SAMPLE DOCUMENT REVIEW; 'Account Settings' on the right with sections for USERS, PLAN MANAGER, and LENDER PROFILE; and 'Latest News' at the bottom right with a list of recent updates.

- Next, *My Documents* takes up the center of your DocMagic dashboard.
 - [Document Files](#) contains every recent document package you've generated, eSign or otherwise.
 - [Forms Analyzer](#) allows you to browse our complete library of 300,000+ forms.
 - [Stacking Order](#) allows you to edit the order that documents are generated on based on category type for your entire account. Use discretion!

My Documents

The screenshot shows the DocMagic dashboard interface. At the top, there is a navigation bar with the DocMagic logo, contact information (INFO@DOCMAGIC.COM and PHONE (800) 649-1362), and menu items: SOLUTIONS, SERVICES, COMPLIANCE, SUPPORT, COMPANY, REQUEST A DEMO, and DASHBOARD / LOG OUT. Below the navigation bar, the dashboard is personalized for 'ALAN! (#100SALES)' and includes a 'TOUR THE DASHBOARD' link. The main content area is divided into several sections:

- Launch Center:** A vertical list of tool icons including eSign Console, AutoPrep™, DocMagic®, DocMagic® One, SmartCLOSE®, LoanMagic® Console, eVault, and SmartREGISTRY™.
- My Documents:** A central section with a blue arrow pointing to it. It contains six tiles:
 - DOCUMENT FILES:** Access and manage your loan document files.
 - FORM ANALYZER:** Access our extensive forms library for document management.
 - STACKING ORDER:** Modify the order of documents in your packages.
 - REPORT MANAGER:** Generate reports: 1098, Closing, HMDA, and more.
 - LOAN DEFAULTS:** Manage charges, fees, premiums, impounds, and more.
 - SAMPLE DOCUMENT REVIEW:** Review and approve your sample documents.
- Account Settings:** A section with three sub-sections:
 - USERS:** Set up and manage user accounts and permissions.
 - PLAN MANAGER:** Manage the loan programs for your account.
 - LENDER PROFILE:** Manage your company and contact information.
- Latest News:** A section with three news items:
 - URLA: Updates, Improvements and Deadlines
 - Getting Started with eClose
 - Closing a Loan Electronically
- Compliance Edge:** Tools and resources to help you stay on top of compliance change as it happens.
- Help Center:** Search our knowledge base for answers to your common questions.

- [Report Manager](#) allows you to generate 1098, Closing, HMDA, and Charges reports.
- [Loan Defaults](#) allows you to enter charges, fees, premiums, and impounds that will be included on every loan file.
- Sample Document Review is currently not functioning. Please run test files to see the contents of your document packages.

Launch Center

The screenshot displays the DocMagic dashboard interface. At the top, there is a navigation bar with the DocMagic logo, contact information (INFO@DOCMAGIC.COM and PHONE (800) 649-1362), and menu items for SOLUTIONS, SERVICES, COMPLIANCE, SUPPORT, and COMPANY. A search icon and buttons for REQUEST A DEMO and DASHBOARD / LOG OUT are also present. Below the navigation bar, a welcome message reads 'WELCOME ALAN! (#100SALES)' with a 'TOUR THE DASHBOARD' link. The main content area is divided into several sections: 'Launch Center' (highlighted with a blue arrow), 'My Documents', 'Account Settings', and 'Latest News'. The 'Launch Center' section contains a vertical list of tool icons: eSign Console, AutoPrep™, DocMagic®, DocMagic® One, SmartCLOSE®, LoanMagic® Console, eVault, and SmartREGISTRY™. The 'My Documents' section includes 'DOCUMENT FILES', 'FORM ANALYZER', 'STACKING ORDER', 'REPORT MANAGER', 'LOAN DEFAULTS', and 'SAMPLE DOCUMENT REVIEW'. The 'Account Settings' section includes 'USERS', 'PLAN MANAGER', and 'LENDER PROFILE'. The 'Latest News' section lists updates, improvements, and deadlines.

- The *Launch Center* is on the left.
 - Manage your eSign packages in DocMagic's [eSign Console](#). Track participants, monitor progress, and check on completion statuses of all your electronically signed documents all in one place.
 - [AutoPrep](#) is our proprietary auto-tagging tool that triggers whenever a document is added to an existing package. You can also activate it directly from the dashboard, enter participants, upload documents, and create eSign requests from scratch.

Launch Center

The screenshot shows the DocMagic Launch Center dashboard. At the top, there is a navigation bar with the DocMagic logo, contact information (INFO@DOCMAGIC.COM and PHONE (800) 649-1362), and menu items: SOLUTIONS, SERVICES, COMPLIANCE, SUPPORT, COMPANY, REQUEST A DEMO, and DASHBOARD / LOG OUT. Below the navigation bar, the dashboard is personalized for user ALAN! (#100SALES). The main content area is divided into several sections:

- Launch Center:** A vertical list of product tiles including eSign Console, AutoPrep™, DocMagic®, DocMagic® One, SmartCLOSE®, LoanMagic® Console, eVault, and SmartREGISTRY™.
- My Documents:** A grid of document management tools: DOCUMENT FILES, FORM ANALYZER, STACKING ORDER, REPORT MANAGER, LOAN DEFAULTS, and SAMPLE DOCUMENT REVIEW.
- Account Settings:** A section for managing user accounts, loan programs, and company information.
- Compliance Edge:** Tools and resources for staying up-to-date on compliance changes.
- Help Center:** A search bar for finding answers to common questions.
- Latest News:** A list of recent updates, improvements, and deadlines.

- [DocMagic Online](#) is our Java-based data entry and document generation platform.
 - If you are using an integrated LOS (we have guides for most of them on our [Training Page](#)), you will only need to go into DocMagic Online if your integration does not support a certain function.
- DocMagic One is our next generation solution. Every DocMagic product and service on a single web-based platform. Watch this space – more to come!

Launch Center

- SmartCLOSE and LoanMagic are our collaboration tools.

- [SmartCLOSE](#) brings Lenders and Settlement Agents into a shared space to work on balancing fees and other data in real time.

- LoanMagic is an app for borrowers that gamifies the mortgage process. This solution may no longer be supported.

Launch Center

- eVault and SmartREGISTRY are for post closing transactions.
 - DocMagic's [eVault](#) provides secure, long-term storage of eNotes and other digital assets.
 - [SmartREGISTRY](#) is a portal where you can perform all MERS eRegistry and eDelivery functions seamlessly on eNotes stored in the eVault.

The screenshot displays the DocMagic website interface. At the top, there is a navigation bar with the DocMagic logo, menu items for SOLUTIONS, SERVICES, COMPLIANCE, SUPPORT, and COMPANY, and buttons for REQUEST A DEMO and DASHBOARD / LOG OUT. Below the navigation bar, a 'Solutions' dropdown menu is open, listing various categories and their sub-items. The categories include Document Generation, eSignature Platforms, eMortgage Technology, Automated Compliance, Collaborative Technology, and eChattel Technology. A 'Launch Center' sidebar on the left contains icons for eSign Console, AutoPrep™, DocMagic®, and SmartCLOSE. At the bottom of the page, there are sections for Compliance Edge, Help Center, and a list of links including URLA, Getting Started with eClose, and Closing a Loan Electronically.

WELCOME ALAN!

Solutions
Innovative, automated, and compliant technology solutions designed to advance every stage of your mortgage loan process

Document Generation
We ensure data and document accuracy from initial disclosures to closing

- ▶ DocMagic
- ▶ Packages
- ▶ Downloads

eSignature Platforms
Electronically sign and notarize documents and automate appraisal delivery

- ▶ ClickSign®
- ▶ eNotary
- ▶ Appraisal eDelivery

eMortgage Technology
Seamless and compliant digital platforms for completely paperless eClosings

- ▶ Total eClose™
- ▶ AutoPrep™
- ▶ SmartSAFE® with SmartREGISTRY™

Automated Compliance
Ensuring compliance at every stage of the loan process

- ▶ Compliance Edge Newsletter
- ▶ Compliance Edge

Collaborative Technology
Tools for borrowers, lenders and title agents to collaborate on the loan process

- ▶ LoanMagic®
- ▶ SmartCLOSE®

eChattel Technology
eVaulting solutions for your non-mortgage lending needs

- ▶ SmartSAFE® with SmartTRANSFER

Compliance Edge
Tools and resources to help you stay on top of compliance change as it happens.

Help Center
Search our knowledge base for answers to your common questions.

- ▶ URLA: Updates, Improvements and Deadlines
- ▶ Getting Started with eClose
- ▶ Closing a Loan Electronically

- [DocMaster](#) allows you to perform the following functions on DBK files post-generation before sending them out:

- Re-arrange the stacking order
- Remove forms from the stack
- Attach additional files

- The program requires a local install and can be found in the Downloads section, located under Solutions in the website's top ribbon.

DocMagic Matrices

INFO@DOCMAGIC.COM | PHONE (800) 649-1362

DocMagic SOLUTIONS SERVICES COMPLIANCE SUPPORT COMPANY REQUEST A DEMO DASHBOARD / LOG OUT

WELCOME ALAN!

Compliance
The core component inside all of our mortgage technology solutions

TOUR THE DASHBOARD

Launch Center

- eSign Console
- AutoPrep™
- DocMagic®
- DocMagic®
- SmartCLOSE
- LoanMagic® Console
- eVault
- SmartREGISTRY™

Updates
Compliance to ensure accuracy at every stage of the lending process

- ▶ Compliance Updates
- ▶ Form Updates
- ▶ Investor Updates
- ▶ Investor eQC

Resources
All your compliance resources in one place available with DocMagic

- ▶ Compliance Matrices
- ▶ Disclosures
- ▶ High Cost Memos
- ▶ TRID
- ▶ URLA Resources

Compliance Edge Newsletter
The most up-to-date compliance information available in the industry

- ▶ Articles
- ▶ Legal & Regulatory Updates
- ▶ Form Updates
- ▶ Events
- ▶ System Updates

LOAN DEFAULTS
Manage charges, fees, premiums, impounds, and more

SAMPLE DOCUMENT REVIEW
Review and approve your sample documents

Compliance Edge
Tools and resources to help you stay on top of compliance change as it happens.

Help Center
Search our knowledge base for answers to your common questions.

Latest News

- ▶ URLA: Updates, Improvements and Deadlines
- ▶ Getting Started with eClose
- ▶ Closing a Loan Electronically

- DocMagic's [Compliance](#) and [Disclosure](#) Matrices can be found under the Compliance section from the top ribbon of the website. These break down how certain disclosures pull and how certain compliance topics differ by state.

Product Training Page

DocMagic SOLUTIONS SERVICES COMPLIANCE **SUPPORT** COMPANY [REQUEST A DEMO](#) [DASHBOARD / LOG OUT](#)

Product Training

Support
Let us help you get the most from DocMagic

Customer Support
Log in and let us help you

Product Training
Get to know our products

Welcome to the DocMagic Product Training Page

We've assembled a library of videos, guidebooks and other materials that will provide you with the tools to successfully navigate our products, or those of our partners.

Scroll down to find the product or service you need help with and click on the icon to access that page.

Account Settings Arive AutoPrep BytePro Calyx Path

- Finally, please bookmark (<https://www.docmagic.com/product-training>) if you have not already! Our library of training resources lives here and is constantly being updated. If you can't find what you're looking for, feel free to reach out to training@docmagic.com