

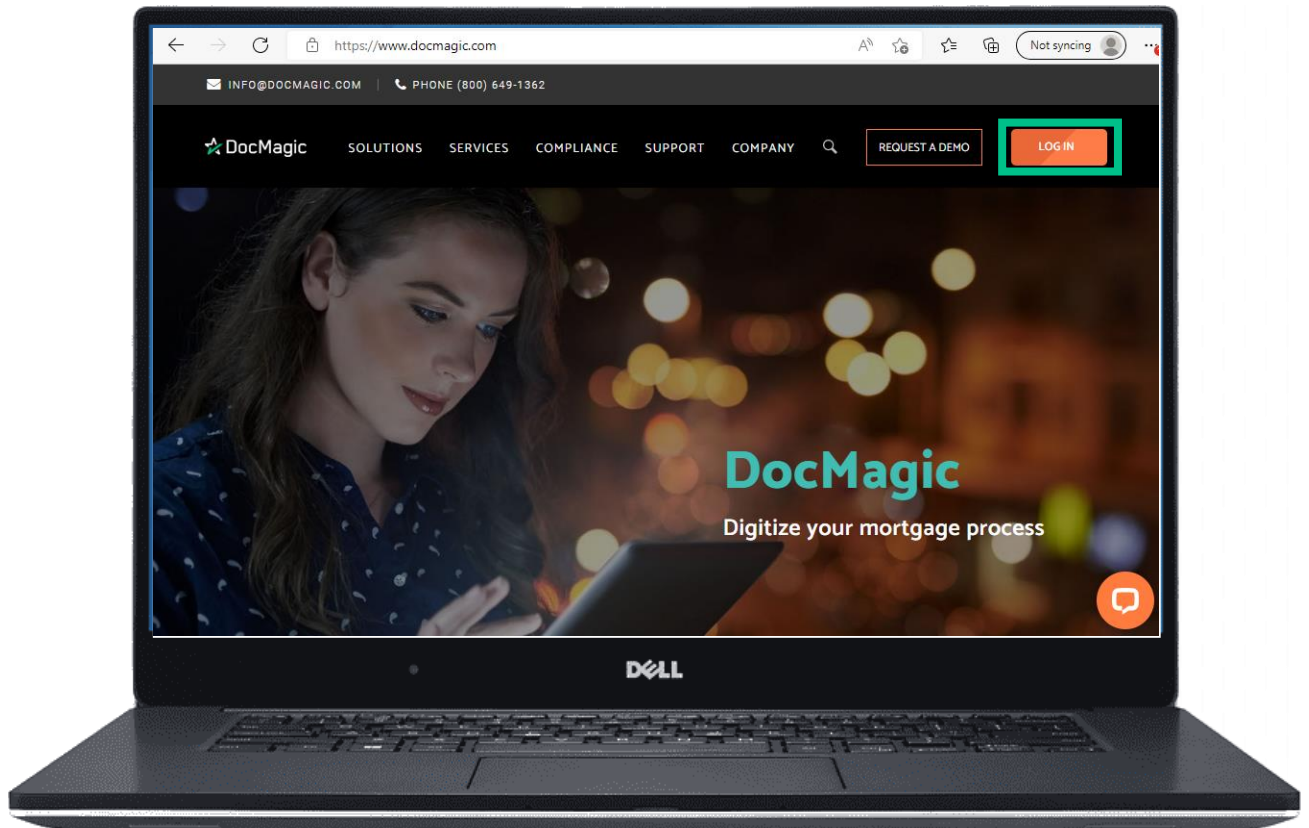


Lender Profile

Lender Profile

Navigating to Lender Profile

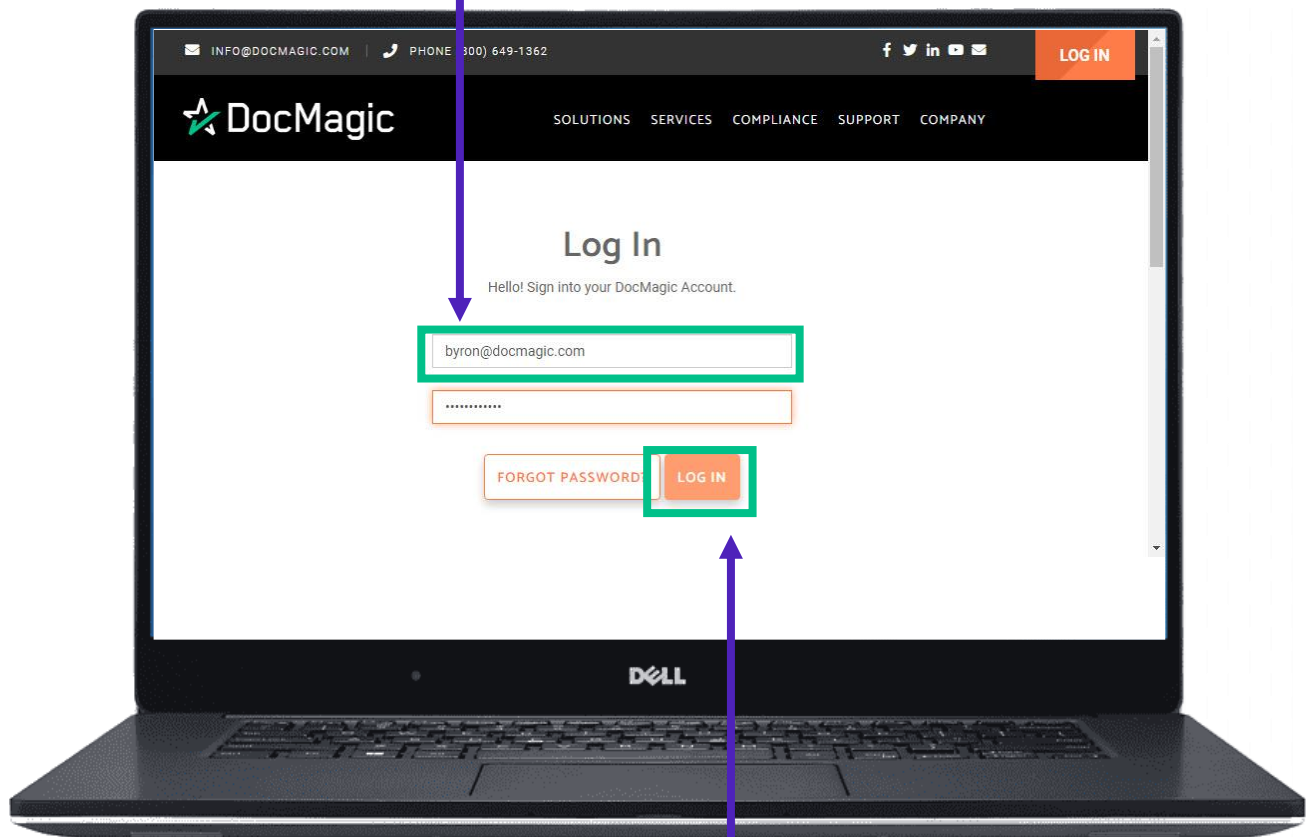
Go to www.docmagic.com



Lender Profile

Navigating to Lender Profile

Login with your
email and
password.



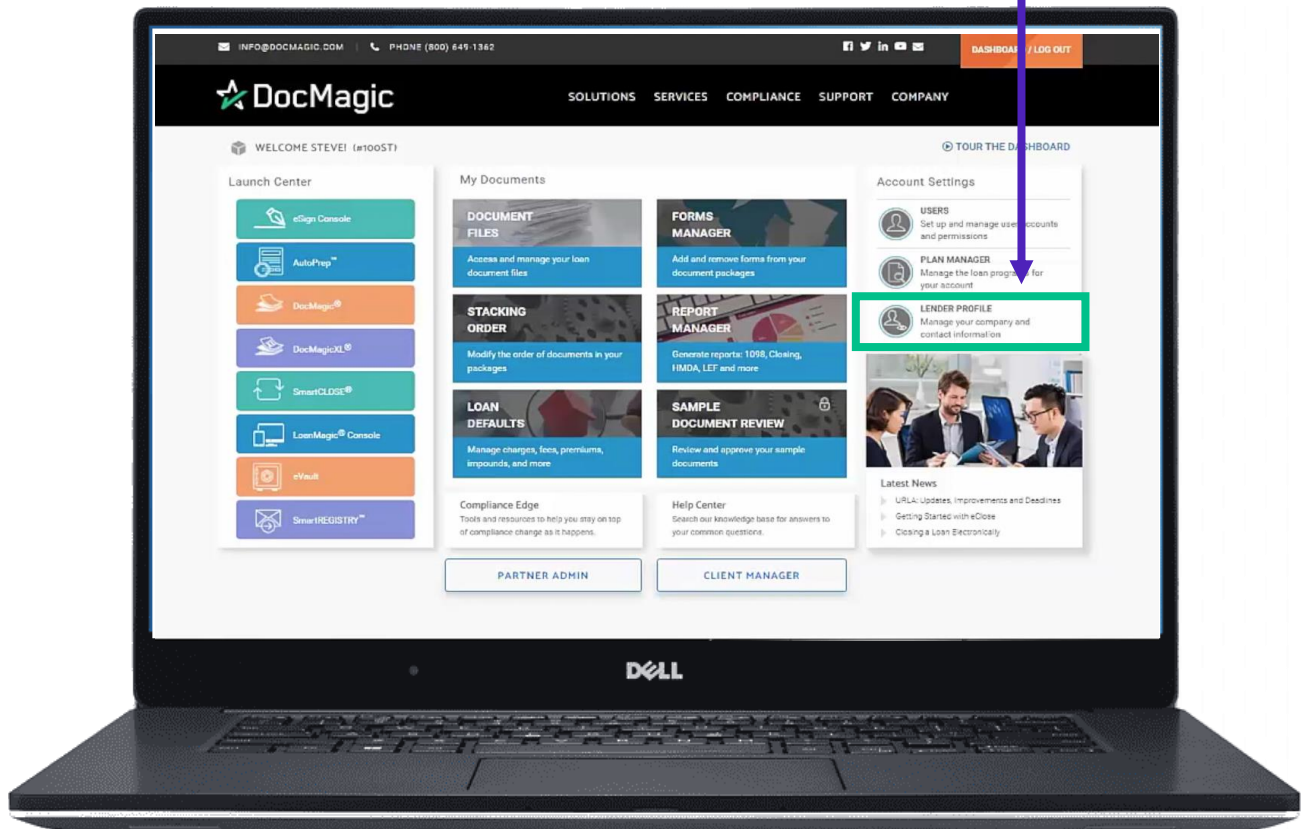
Click "LOG IN"



Lender Profile

Navigating to Lender Profile

Choose Lender Profile
from the Dashboard



Lender Profile

Lender

Updating the Lender information will be reflected throughout the forms where the Lender's information appears.

The screenshot shows a web browser window displaying the DocMagic Lender Profile form. The browser's address bar shows 'INFO@DOCMAGIC.COM' and 'PHONE (800) 649-1362'. The DocMagic logo is in the top left, and navigation links for SOLUTIONS, SERVICES, COMPLIANCE, SUPPORT, and COMPANY are in the top right. A 'DASHBOARD / LOG OUT' button is also visible. The form title is 'Lender Profile', and a note states: 'The information below is used on all mortgage documentation. Please verify and confirm the accuracy of the information below before you continue.'

The form fields are as follows:

- * Company Name: DSI TEST LENDER (ALAN DAI)
- * Address: 1800 WEST 213TH STREET
- * City: TORRANCE
- * State: CALIFORNIA
- * Zip: 90501
- * Phone: (800)649-1362
- Fax: (empty)
- * Org State: CALIFORNIA
- * Org Type: A CALIFORNIA CORPORATION

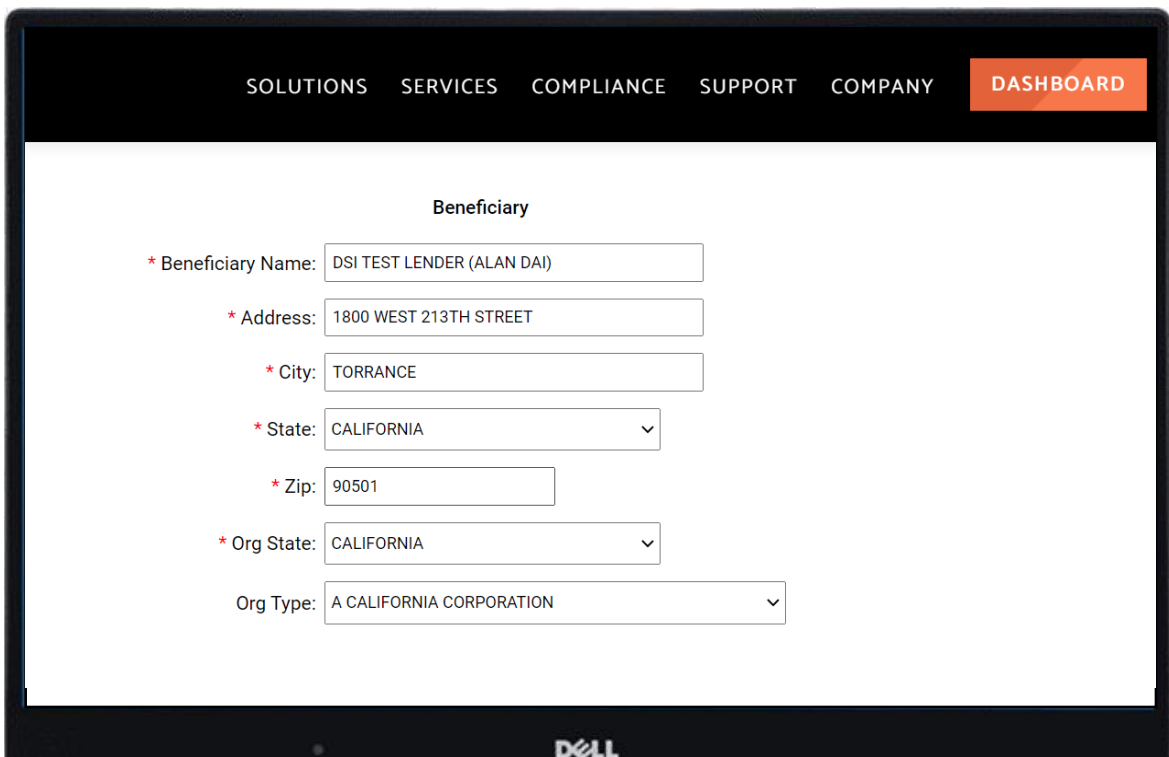
The Dell logo is visible at the bottom center of the browser window.



Lender Profile

Beneficiary

The information entered here determines who will appear as the Beneficiary on Page 1 of the security instruments.



The screenshot shows a web application interface with a navigation bar at the top containing 'SOLUTIONS', 'SERVICES', 'COMPLIANCE', 'SUPPORT', 'COMPANY', and 'DASHBOARD'. The main content area is titled 'Beneficiary' and contains the following form fields:

- * Beneficiary Name: DSI TEST LENDER (ALAN DAI)
- * Address: 1800 WEST 213TH STREET
- * City: TORRANCE
- * State: CALIFORNIA
- * Zip: 90501
- * Org State: CALIFORNIA
- Org Type: A CALIFORNIA CORPORATION

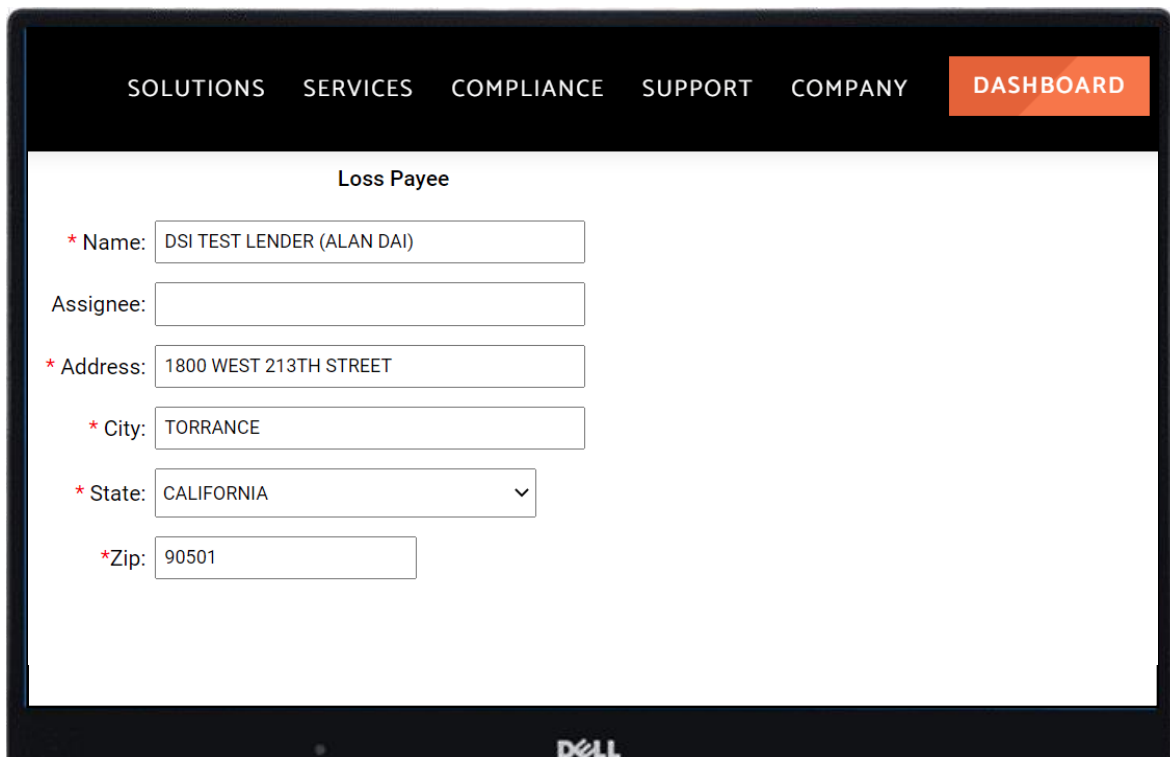
This is most often the lender.



Lender Profile

Loss Payee

The Loss Payee is the party to whom the claim from a loss is to be paid.



The screenshot shows a web application interface with a navigation bar at the top containing 'SOLUTIONS', 'SERVICES', 'COMPLIANCE', 'SUPPORT', 'COMPANY', and 'DASHBOARD'. The 'DASHBOARD' button is highlighted in orange. Below the navigation bar, the page title is 'Loss Payee'. The form contains the following fields:

- * Name: DSI TEST LENDER (ALAN DAI)
- Assignee: (empty)
- * Address: 1800 WEST 213TH STREET
- * City: TORRANCE
- * State: CALIFORNIA (dropdown menu)
- * Zip: 90501

The Dell logo is visible at the bottom center of the screen.

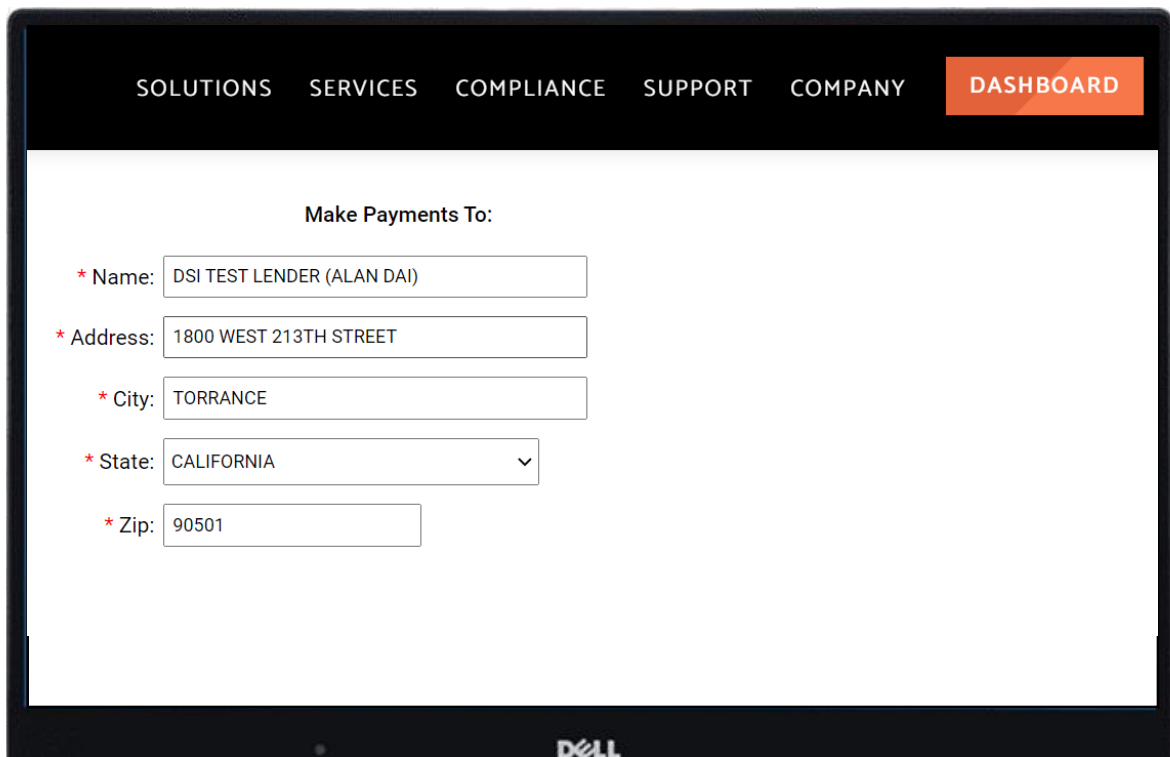
Some examples of forms affected by changing this data, denoted by their DocMagic form codes, include: Hazard 8.LSR, GCI.MSC, RFCTIP.MSC, NOST.MSC



Lender Profile

Make Payments To

This section informs the borrower where to mail their payments.



The screenshot shows a web interface with a navigation bar at the top containing links for SOLUTIONS, SERVICES, COMPLIANCE, SUPPORT, COMPANY, and DASHBOARD. The main content area is titled "Make Payments To:" and contains the following form fields:

- * Name: DSI TEST LENDER (ALAN DAI)
- * Address: 1800 WEST 213TH STREET
- * City: TORRANCE
- * State: CALIFORNIA (dropdown menu)
- * Zip: 90501

The Dell logo is visible at the bottom center of the screen.

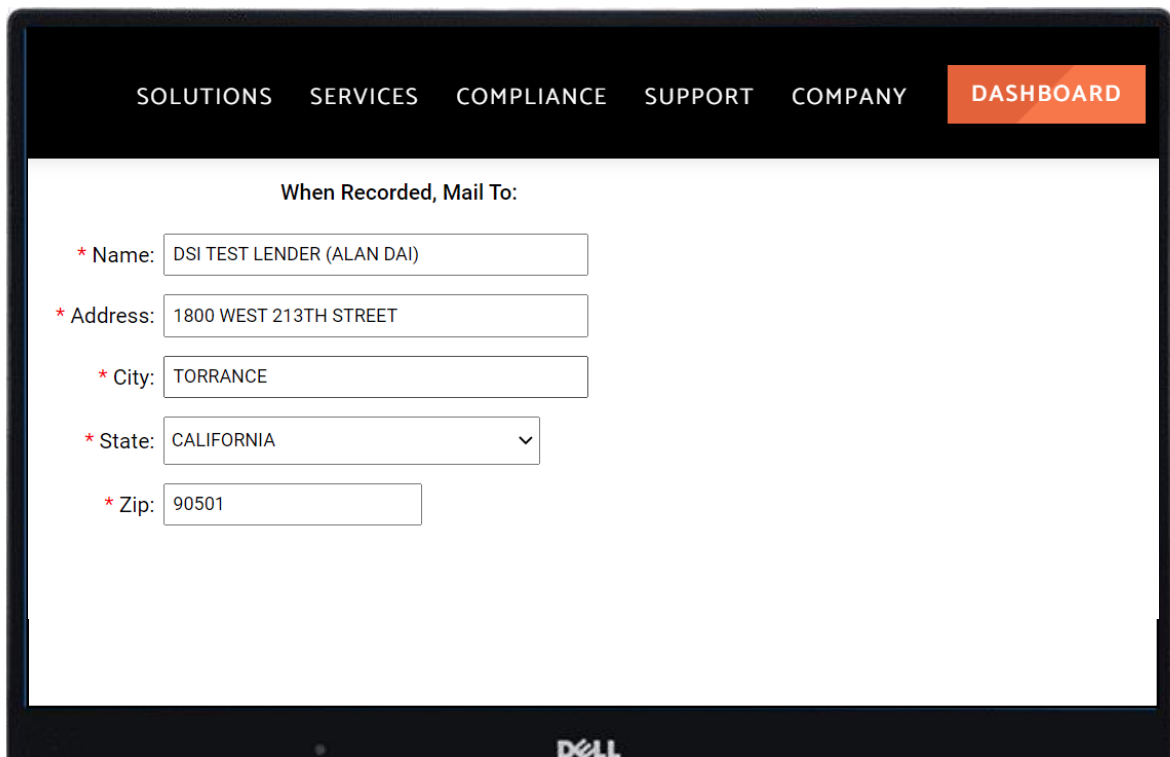
Some examples of forms affected by changing this data, denoted by their DocMagic form codes, include: Payment.LSR, SRVLET.MSC



Lender Profile

When Recorded Mail To

Updating this section will affect the Security Instruments.



The screenshot shows a web application interface with a dark header. The header contains navigation links: SOLUTIONS, SERVICES, COMPLIANCE, SUPPORT, COMPANY, and DASHBOARD (highlighted in orange). Below the header is a form titled "When Recorded, Mail To:" with the following fields:

- * Name: DSI TEST LENDER (ALAN DAI)
- * Address: 1800 WEST 213TH STREET
- * City: TORRANCE
- * State: CALIFORNIA (dropdown menu)
- * Zip: 90501

The Dell logo is visible at the bottom center of the screen.

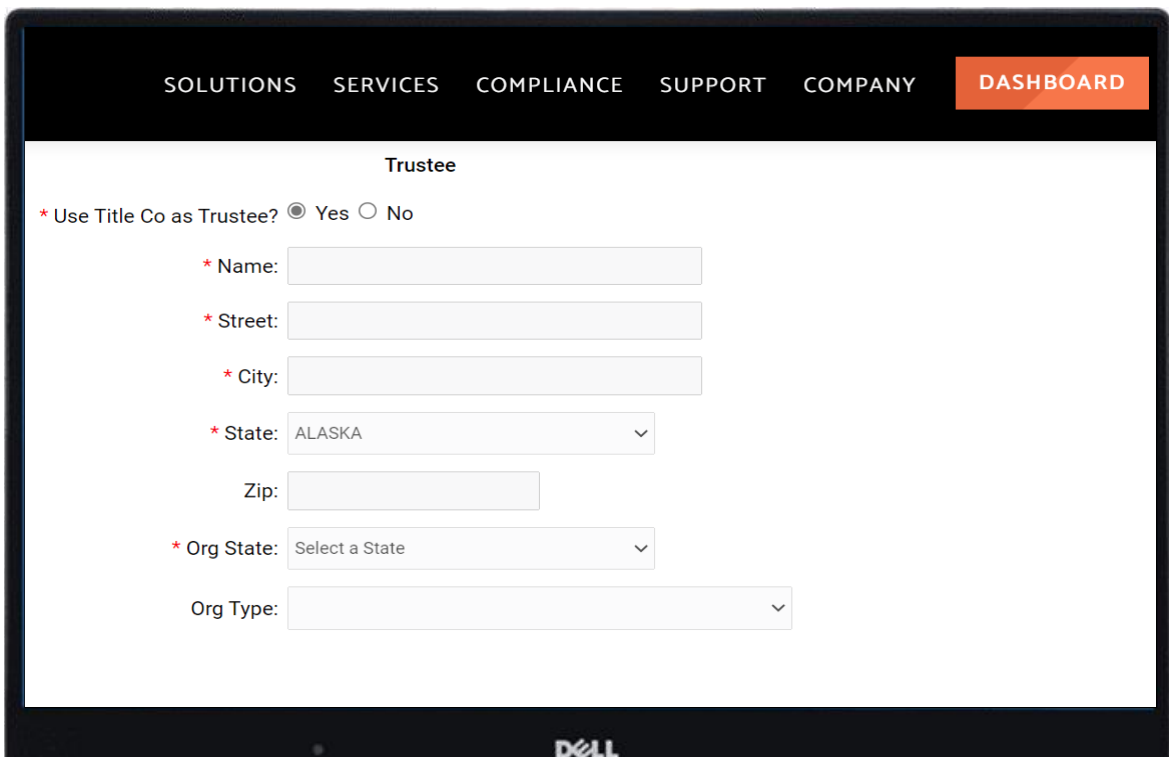
This section will show where to mail the recorded documents after they have been signed and recorded.



Lender Profile

Trustee

Updating this section will affect forms with Trustee information on them.



The screenshot shows a web application interface with a dark navigation bar at the top containing the following links: SOLUTIONS, SERVICES, COMPLIANCE, SUPPORT, COMPANY, and DASHBOARD (highlighted in orange). Below the navigation bar is a form titled "Trustee". The form contains the following fields:

- * Use Title Co as Trustee? Yes No
- * Name:
- * Street:
- * City:
- * State: ALASKA (dropdown menu)
- Zip:
- * Org State: Select a State (dropdown menu)
- Org Type:

The DELL logo is visible at the bottom center of the application frame.

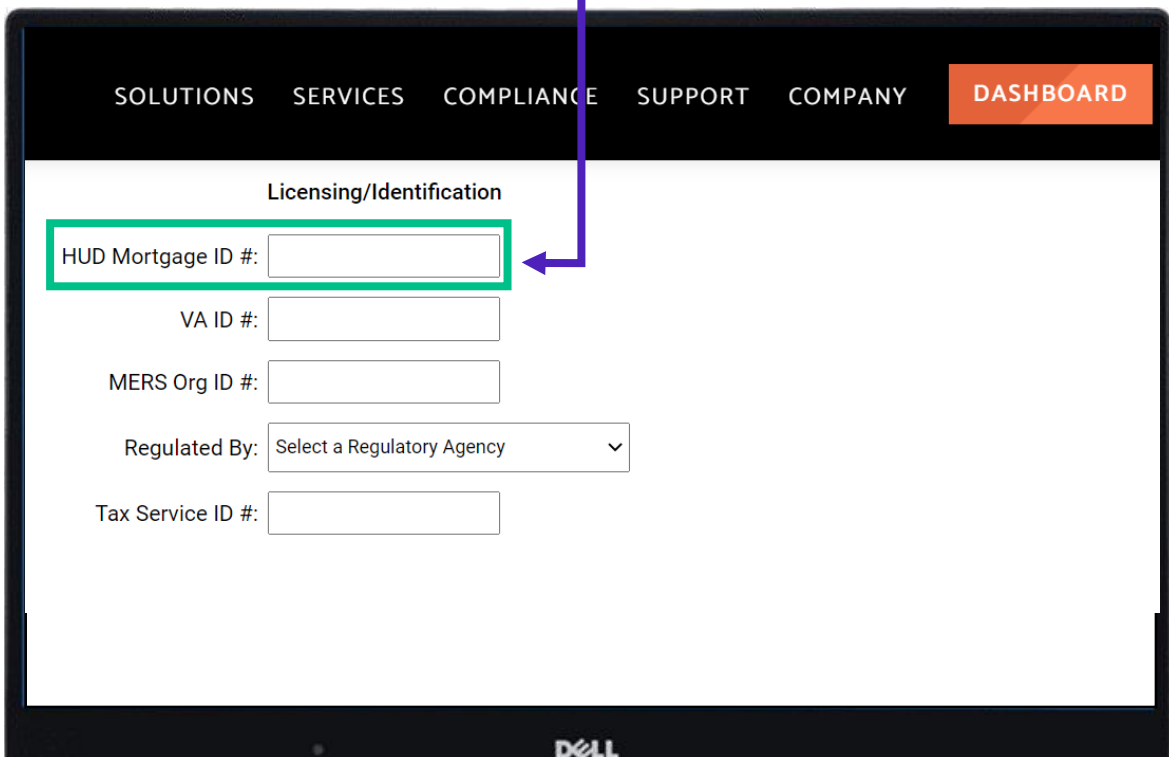
Clicking "Yes" for "Use Title Co. as Trustee" will default the Title Company's information as the Trust on the Security instruments. Clicking "No" will allow you to enter a Trustee.



Lender Profile

Licensing Information

Updating this information will affect FHA forms where the HUD Mortgage ID # is required.



The screenshot displays a web application interface with a navigation bar at the top containing the following items: SOLUTIONS, SERVICES, COMPLIANCE, SUPPORT, COMPANY, and DASHBOARD (highlighted in orange). Below the navigation bar is a section titled 'Licensing/Identification'. This section contains several input fields: 'HUD Mortgage ID #' (highlighted with a green box and an arrow from the text above), 'VA ID #', 'MERS Org ID #', 'Regulated By:' (with a dropdown menu showing 'Select a Regulatory Agency'), and 'Tax Service ID #'. The Dell logo is visible at the bottom center of the screen.

Some examples of forms affected by changing this data, denoted by their DocMagic form codes, include: RECCHG.LSR, ONETIME.LSR, and ENDREQ.LSR



Lender Profile

Licensing Information

Updating this information will affect the VA forms and any forms requiring a case number.

The screenshot shows a web application interface with a navigation bar at the top containing the following items: SOLUTIONS, SERVICES, COMPLIANCE, SUPPORT, COMPANY, and DASHBOARD (highlighted in orange). Below the navigation bar is the 'Licensing/Identification' section, which contains the following fields:

- HUD Mortgage ID #:
- VA ID #: (highlighted with a green box and a purple arrow pointing to it from the text box above)
- MERS Org ID #:
- Regulated By: (dropdown menu)
- Tax Service ID #:

The DELL logo is visible at the bottom center of the screen.

Some examples of forms affected by changing this data, denoted by their DocMagic form codes, include: GCI.MSC, CD.DSC along with the VA Security Instrument



Lender Profile

Licensing Information

The MERS ORG ID # is a seven-digit number assigned to a lender by the Mortgage Electronic Recording System (MERS). This is only for lenders using the MERS system.

SOLUTIONS SERVICES COMPLIANCE SUPPORT COMPANY DASHBOARD

Licensing/Identification

HUD Mortgage ID #:

VA ID #:

MERS Org ID #:

Regulated By:

Tax Service ID #:

DocMagic uses this number in conjunction with a loan number that consists of at least 10 digits to create the MERS number.



Lender Profile

Licensing Information

Use the drop down to indicate what regulatory agency your company falls under.

The screenshot shows a web interface with a navigation bar at the top containing the following items: SOLUTIONS, SERVICES, COMPLIANCE, SUPPORT, COMPANY, and DASHBOARD (highlighted in orange). Below the navigation bar is a form titled "Licensing/Identification". The form contains the following fields:

- HUD Mortgage ID #:
- VA ID #:
- MERS Org ID #:
- Regulated By: (dropdown menu)
- Tax Service ID #:

Two green boxes highlight the "Regulated By" dropdown and the "Tax Service ID #" field. A blue arrow points from the top text box to the "Regulated By" dropdown, and another blue arrow points from the bottom text box to the "Tax Service ID #" field. The Dell logo is visible at the bottom center of the screen.

A Federal Tax Identification number used to identify a business entity.



Lender Profile

Additional Licensing

Add additional licenses for your account by clicking on the "Add a License".

Additional Licenses

State	License Type	License #
ALASKA	Select License Type	<input type="text"/>

[Add a License](#)

UCD Provider Credentials

GSE	User Name	Password	Seller ID
Fannie Mae:	<input type="text" value="aland@docmagic.c"/>	<input type="password" value="....."/>	<input type="text"/>
Freddie Mac:	<input type="text"/>	<input type="text"/>	<input type="text"/>

Various license types can be added for all 50 states.



Lender Profile

Additional Licensing

Use the dropdown box to select the state, license type and then add license number in the field above.

State	License Type	License #
ALASKA	Select a License Type	

[Add a License](#)

GSE	User Name	Password	Seller ID
Fannie Mae:	aland@docmagic.c	
Freddie Mac:			

If a form requires the state license for where the subject property is located, DocMagic will use this information.



Lender Profile

Additional Licensing

Clicking on the "X" removes a previously added license.

The screenshot shows a web interface with a navigation bar at the top containing the following items: SOLUTIONS, SERVICES, COMPLIANCE, SUPPORT, COMPANY, and DASHBOARD (highlighted in orange). Below the navigation bar is the "Additional Licenses" section. It features three input fields: "State" (a dropdown menu with "ALASKA" selected), "License Type" (a dropdown menu with "Select a License Type" selected), and "License #" (an empty text box). To the right of the "License #" field is a small square button containing an "X" icon, which is highlighted with a blue border. Below these fields is a link labeled "Add a License".

Below the "Additional Licenses" section is the "UCD Provider Credentials" section. It has a table-like structure with four columns: "GSE", "User Name", "Password", and "Seller ID".

GSE	User Name	Password	Seller ID
Fannie Mae:	<input type="text" value="aland@docmagic.c"/>	<input type="password" value="....."/>	<input type="text"/>
Freddie Mac:	<input type="text"/>	<input type="text"/>	<input type="text"/>

The DELL logo is visible at the bottom center of the page.



Lender Profile

UCD Provider Credentials

Customers using our UCD solution can enter their Fannie Mae and Freddie Mac login credentials in the Lender Profile and have them default when using our UCD creation and delivery solution.

The screenshot shows a web dashboard with a navigation bar at the top containing the following items: SOLUTIONS, SERVICES, COMPLIANCE, SUPPORT, COMPANY, and DASHBOARD (highlighted in orange). Below the navigation bar is a section titled "Additional Licenses" with three input fields: "State" (set to ALASKA), "License Type" (set to "Select a License Type"), and "License #". Below these fields is a link labeled "Add a License".

Below the "Additional Licenses" section is a section titled "UCD Provider Credentials" which is highlighted with a green border. This section contains a table with the following structure:

GSE	User Name	Password	Seller ID
Fannie Mae:	<input type="text" value="aland@docmagic.c"/>	<input type="password" value="....."/>	<input type="text"/>
Freddie Mac:	<input type="text"/>	<input type="password"/>	<input type="text"/>

The DELL logo is visible at the bottom center of the dashboard.



Lender Profile

Miscellaneous

Select whether your company services loans or not. If left blank, you can choose on a loan-by-loan basis.

The screenshot shows a web interface for a 'Lender Profile' with a 'Miscellaneous' section. The navigation bar includes 'SOLUTIONS', 'SERVICES', 'COMPLIANCE', 'SUPPORT', 'COMPANY', and 'DASHBOARD'. The 'Miscellaneous' section contains the following fields:

- 'Able to Service Loans?' with a dropdown menu showing 'Select an Option'.
- 'Recording County:' with a text input field.
- 'Per Diem Days:' with radio buttons for '365' (selected) and '360'.
- '* Impound Cushion Mos.:' with a text input field containing '2'.
- '* PMI Cushion Mos.:' with a text input field containing '0'.

Red text at the bottom of the form indicates '* Required fields'. A purple arrow points from the top text box to the 'Able to Service Loans?' dropdown. Another purple arrow points from the bottom text box to the 'Recording County:' input field.

If applicable, enter the county where the loans will be recorded.



Lender Profile

Miscellaneous

The number of days a lender uses to represent one year when calculating per diem or prepaid interest.

The screenshot shows a web interface for a 'Miscellaneous' form. At the top, there is a navigation bar with links for SOLUTIONS, SERVICES, COMPLIANCE, SUPPORT, COMPANY, and DASHBOARD. The form itself is titled 'Miscellaneous' and contains several fields: 'Able to Service Loans?' with a dropdown menu, 'Recording County:' with a text input, 'Per Diem Days:' with radio buttons for 365 (selected) and 360, '* Impound Cushion Mos.:' with a text input containing '2', and '* PMI Cushion Mos.:' with a text input containing '0'. A red asterisk and the text '* Required fields' are positioned below the cushion month inputs. A purple line with arrows connects the top text box to the 'Per Diem Days' field and the bottom text box to the '* Impound Cushion Mos.:' field.

This tells DocMagic how many additional impound installments are needed to calculate to establish a reserve or cushion that protects the lenders against missed escrow payments. This number cannot exceed 2.



Lender Profile

Miscellaneous

This number indicates how many additional months are to be collected to establish a reserve or cushion.

The screenshot shows a web interface with a navigation menu at the top: SOLUTIONS, SERVICES, COMPLIANCE, SUPPORT, COMPANY, and DASHBOARD. The main content area is titled "Miscellaneous" and contains the following fields:

- Able to Service Loans?
- Recording County:
- Per Diem Days: 365 360
- * Impound Cushion Mos.:
- * PMI Cushion Mos.:

A red asterisk indicates required fields. A purple arrow points from the explanatory text box to the "PMI Cushion Mos." field.

This is normally set to "0".



Lender Profile

Saving Changes

When complete, you MUST click finished at the bottom and return to the dashboard for your changes to take place.

The screenshot shows the DocMagic Lender Profile form. The header includes the DocMagic logo and navigation links: SOLUTIONS, SERVICES, COMPLIANCE, SUPPORT, COMPANY, and DASHBOARD. The form contains several input fields, including an email field (aland@docmagic.c), a Freddie Mac section with three input boxes, and a Miscellaneous section with the following fields:

- Able to Service Loans? (Select an Option v)
- Recording County: (input box)
- Per Diem Days: (radio buttons for 365 and 360)
- * Impound Cushion Mos.: (input box with value 2)
- * PMI Cushion Mos.: (input box with value 0)

Below the form, there is a red asterisk indicating required fields. At the bottom of the form, there are two buttons: CANCEL and FINISHED. The FINISHED button is highlighted with a green box, and a purple arrow points from the instruction box above to it.



Lender Profile

DocMaster & DMO

If the lender only needs to be different for a single loan, use the Alternate Lender feature in DocMagic online or your loan origination software of choice.

The screenshot displays the DocMagic software interface. The 'Alternate Lender' field in the 'General Information' section is highlighted with a green box. A blue arrow points from the text box above to this field. The interface includes a menu bar (File, Edit, Services, Tools, Help), a toolbar with icons for Open, Save, Copy, Default, Audit, Details, APR, Sect32, Impound, Process, View, Email, Appraisal, UCD, Collaboration, eSign, and LoanMagic Portal. The main window is divided into sections: 'General Information' and 'Dates & Times'. The 'General Information' section contains fields for Loan Stage, Loan Program, Alternate Lender (highlighted), Transfer To, Broker Name, Channel, Origination, Loan Rep, Branch, Loan Type, Business Use, Loan Purpose, Same Lender, Type, Program, Lien Position, Simultaneous?, Loan Number, MERS #, MIC / Agency #, Section, Case # Assigned, and Loan Identifiers. The 'Dates & Times' section contains fields for Application Date, Pre-Z Send Date, Estimate Issue Date, Est. Available Through, Intent to Proceed Date, Rate Lock Date, Rate Available Thru, Lock Days Prior to Close, Last Disc. APR, CD/Re-disc Date/Method, CD/Re-disc Rec'd Date, Document Date, Closing Date, Signing Date, Cancel Date, and Disbursement Date.

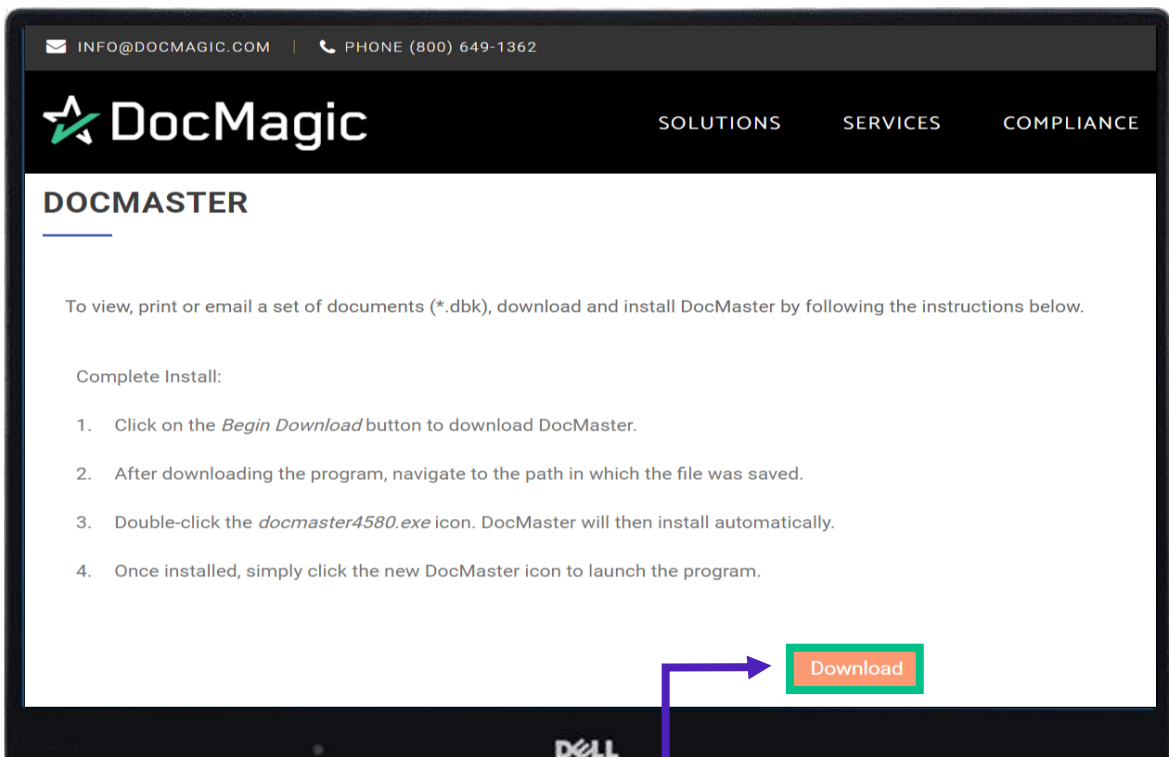
Please note that updates to the Lender Profile apply to the entire account – not just one loan.



Lender Profile

DocMaster & DMO

If you would like to see what forms are affected by updating your lender profile, download, and install DocMaster software here:
<https://www.docmagic.com/download/docmaster>



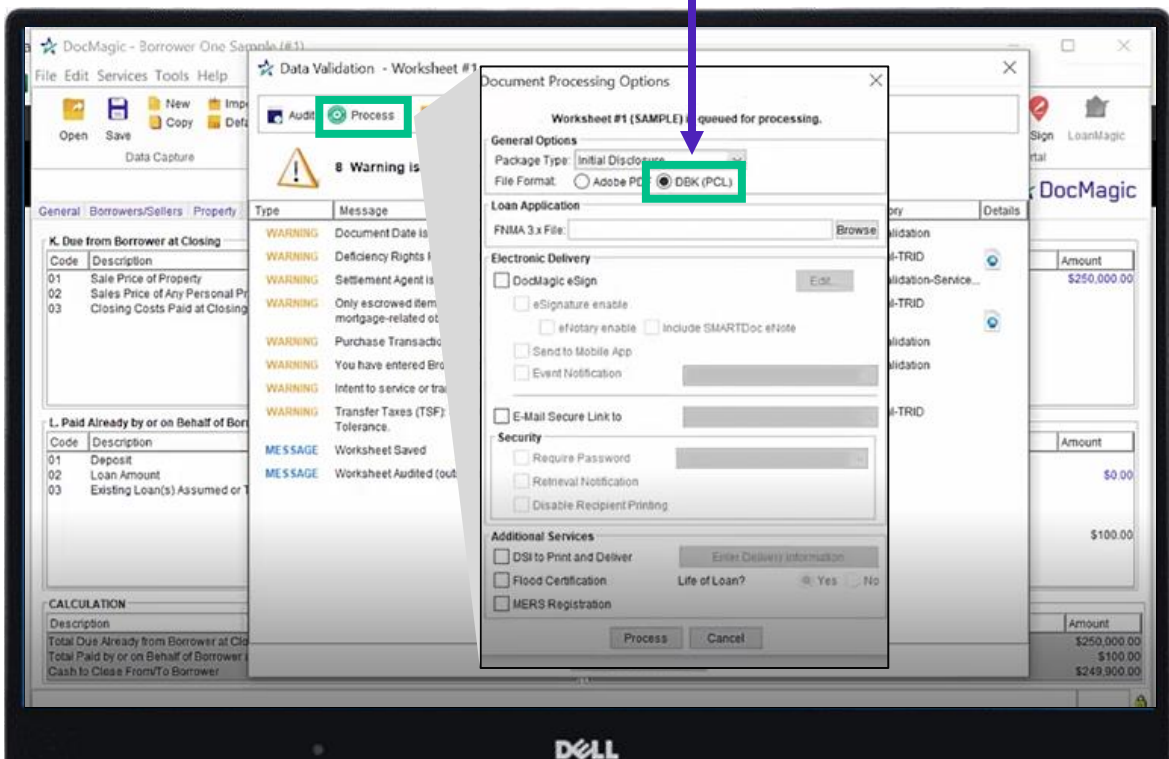
Click "Download".



Lender Profile

DocMaster & DMO

Processing in the DBK format in DocMagic Online will make the forms appear in the DocMaster software for review.



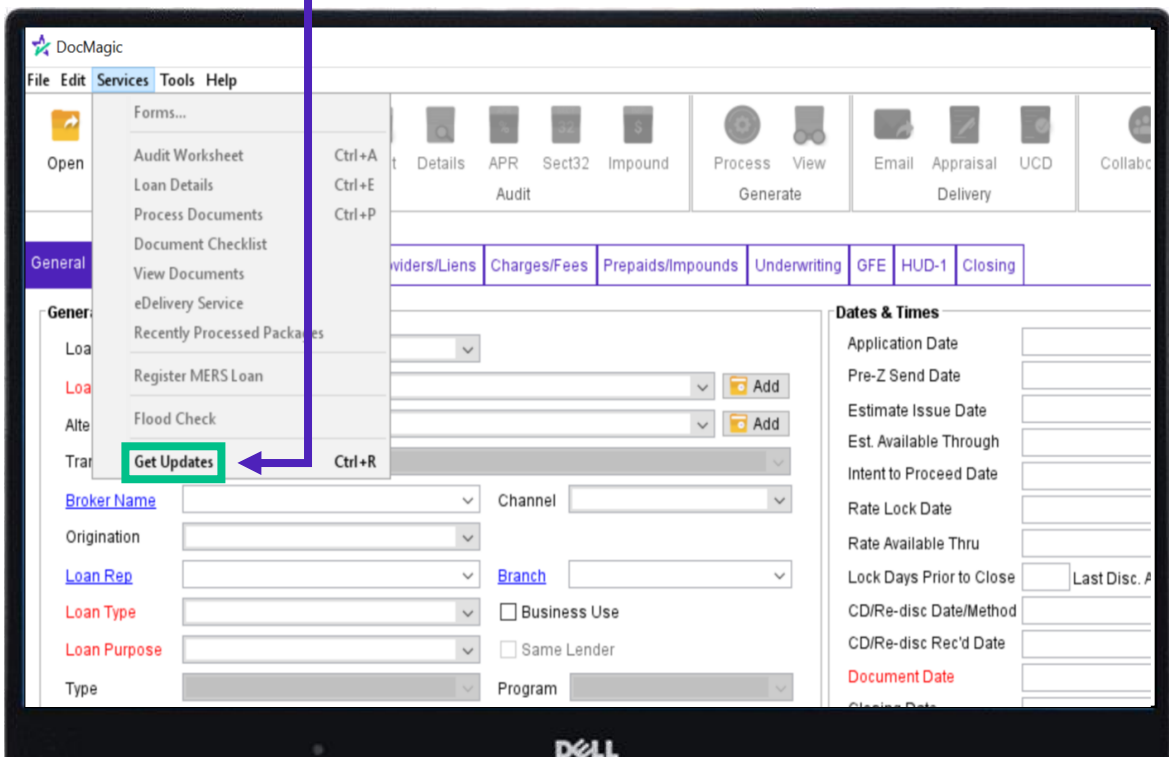
Close DocMaster and update the lender profile by following the instructions in the previous slides.



Lender Profile

DocMaster & DMO

In DocMagic Online, click on "Services" in the upper left of the software and drop down to "Get Updates".



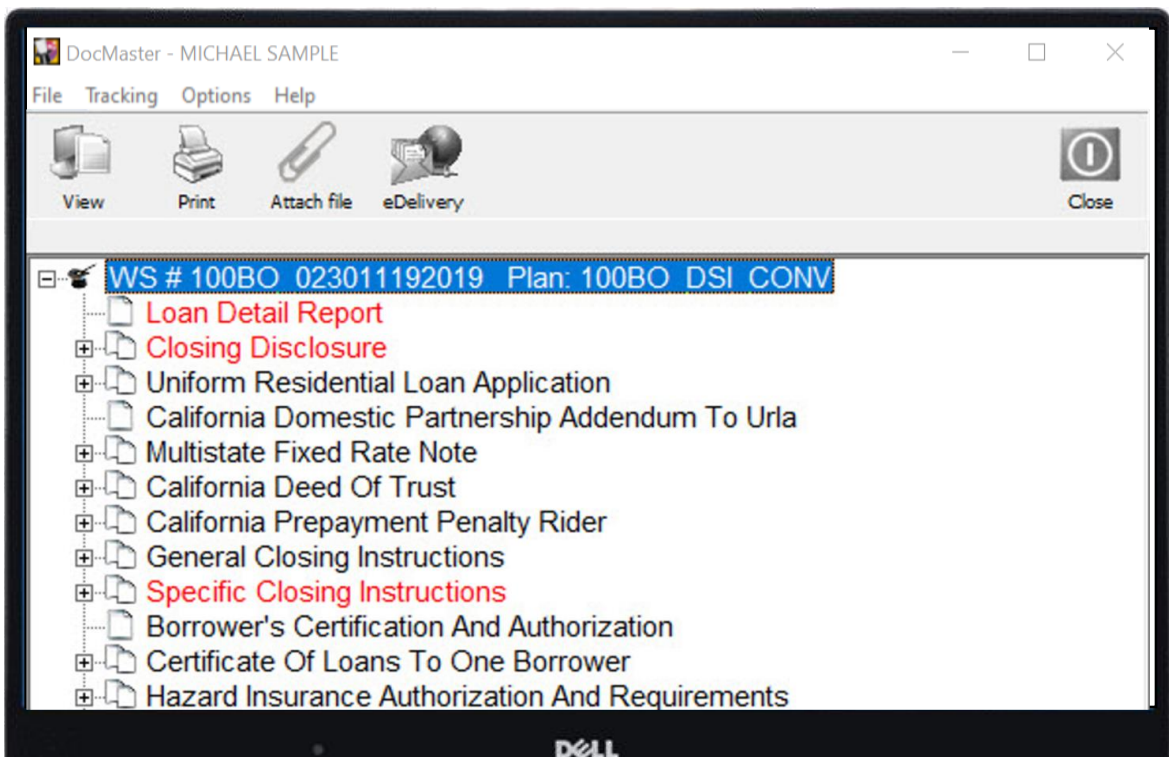
Click "OK" when the update is complete.



Lender Profile

DocMaster & DMO

Reopen the same sample loan file, reprocess your sample loan package and select the DBK format.



When viewing the documents, the forms that were affected by updating one or all sections of the lender profile will appear red as pictured here.

