DocMagic
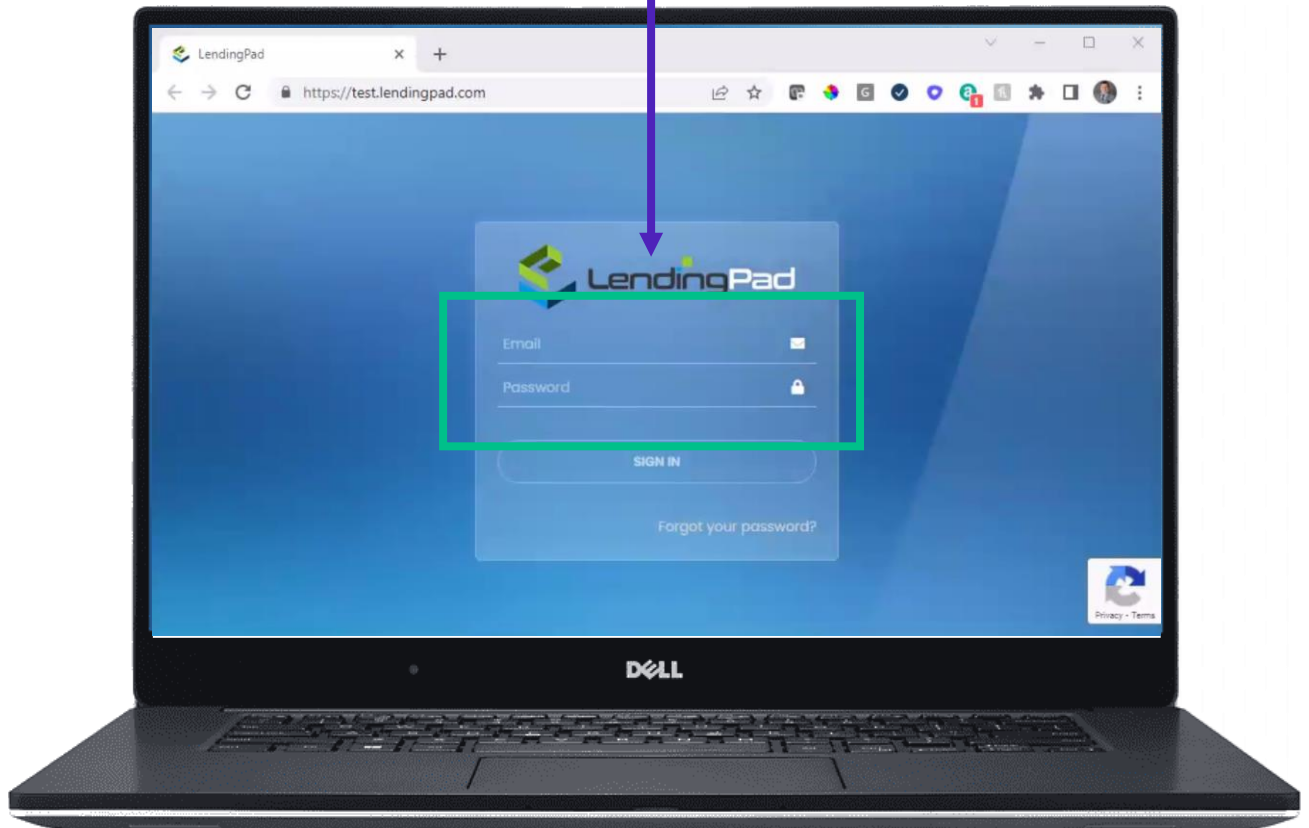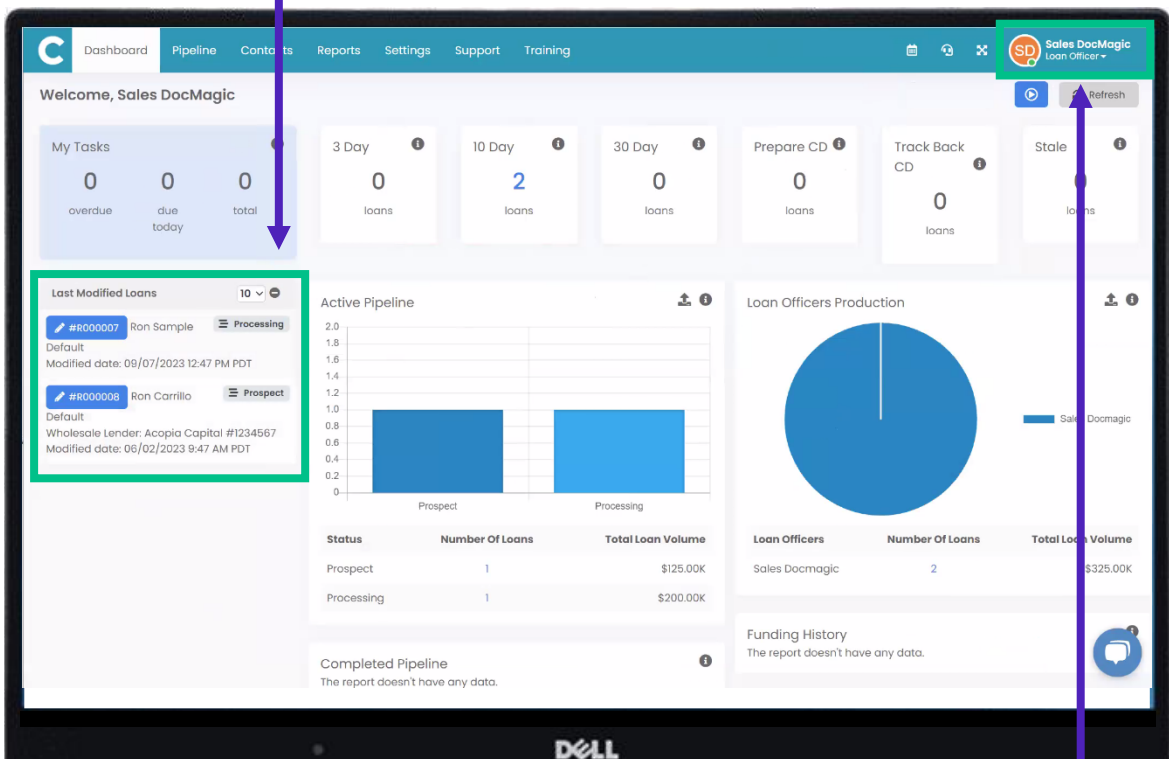
Lending Pad

Getting Started

Login in with your LendingPad credentials.

LendingPad

Select your loan from the dashboard.

We recommend that you log in as an administrator or else you might not be able to see the loans.

LendingPad

Loan Overview

This takes you to the loan overview page. On this page, make sure you have a Loan Officer assigned and an estimated closing date.

LendingPad

Sending A Disclosure

Click on the Actions tab.

Click on the Send button next to Docs Service.

LendingPad

Disclosure Document Request

Select Pre-Disclosure as a package type (if it does not come up by default). A Pre-Disclosure package is equivalent to DocMagic's Initial Disclosure.
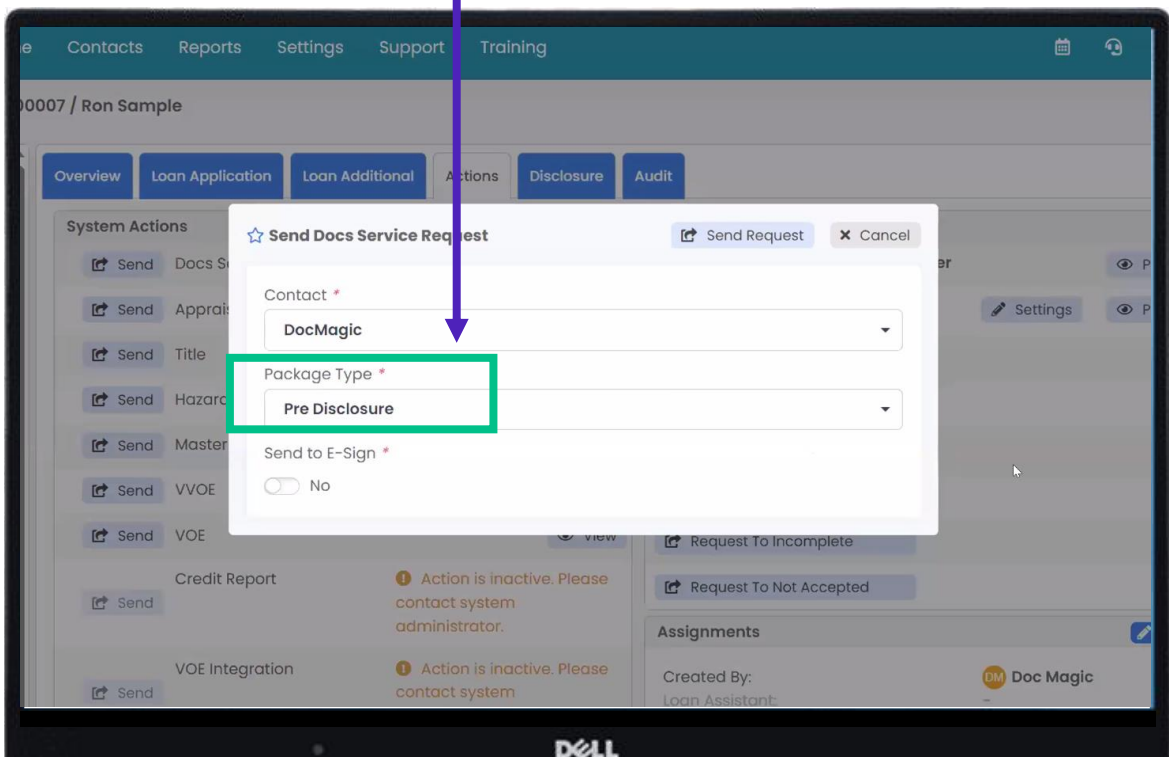
Adding eSign

To add the e-sign service, toggle the switch. If you want to print out the documents, do not select this option.

Contacts   Reports   Settings   Support   Training

0007 / Ron Sample

Overview   Loan Application   Loan Additional   Actions   Disclosure   Audit

System Actions

☆ Send Docs Service Request   ↪ Send Request   ✕ Cancel

Send   Docs S...

Send   Apprais...   ✎ Settings   👁

Send   Title

Send   Hazard...

Contact *

Doc Magic ▾

Package Type *

Pre Disclosure ▾

Send   Master

Send   VVOE

Send to E-Sign *

🔵 Yes

Send   VOE

👁 View   ↪ Request To Incomplete

Credit Report   ❶ Action is inactive. Please   ↪ Request To Not Accepted
Send   contact system
                    administrator.   **Assignments**

VOE Integration   ❶ Action is inactive. Please   Created By   DM Doc Magic
Send   contact system

DELL

Click Send Request.

LendingPad

Success!

Click View to expand your options.

You'll get a success message here.

LendingPad

Viewing The Document Package

Click here to see the Loan Detail Report and the list of documents that were created in your package.

Pipeline \ Manage Loan #R000007 / Ron Sample

Dashboard   Pipeline   Contacts   Reports   Settings   Support   Training

| Summary | Shortcuts |

Overview   Loan Application   Loan Additional   Actions   Disclosure   Audit

Branch: **Default**
Status: **Processing**
Purpose: **Purchase**
Occupancy **Primary Residence**
Subject Property: **1 North Main Street Jacksonville, FL 32218 Duval**

Loan Type: **Conventional**
Program: **Conv 10 Year Fix**
Total LA: **$200,000.00**
COC Flag: **No**
Note Rate: **3.500%**
Qualify Expense: **$2,427.72**
Credit **719**

06/08/2023 10:20 AM PDT   **Success**

Request:
Contact: **DocMagic**
WebSheet ID: **149**
Package Type: **Pre Disclosure**
Send To E-Sign: ☑
Generated By: **Doc Magic**

Response:
Reference ID: **149**
Report Document: **DisclosureDocument_20230608-172052921.pdf**

06/08/2023 10:15 AM PDT   **Success**
06/02/2023 10:15 AM PDT   **Success**
06/02/2023 10:08 AM PDT   **Success**

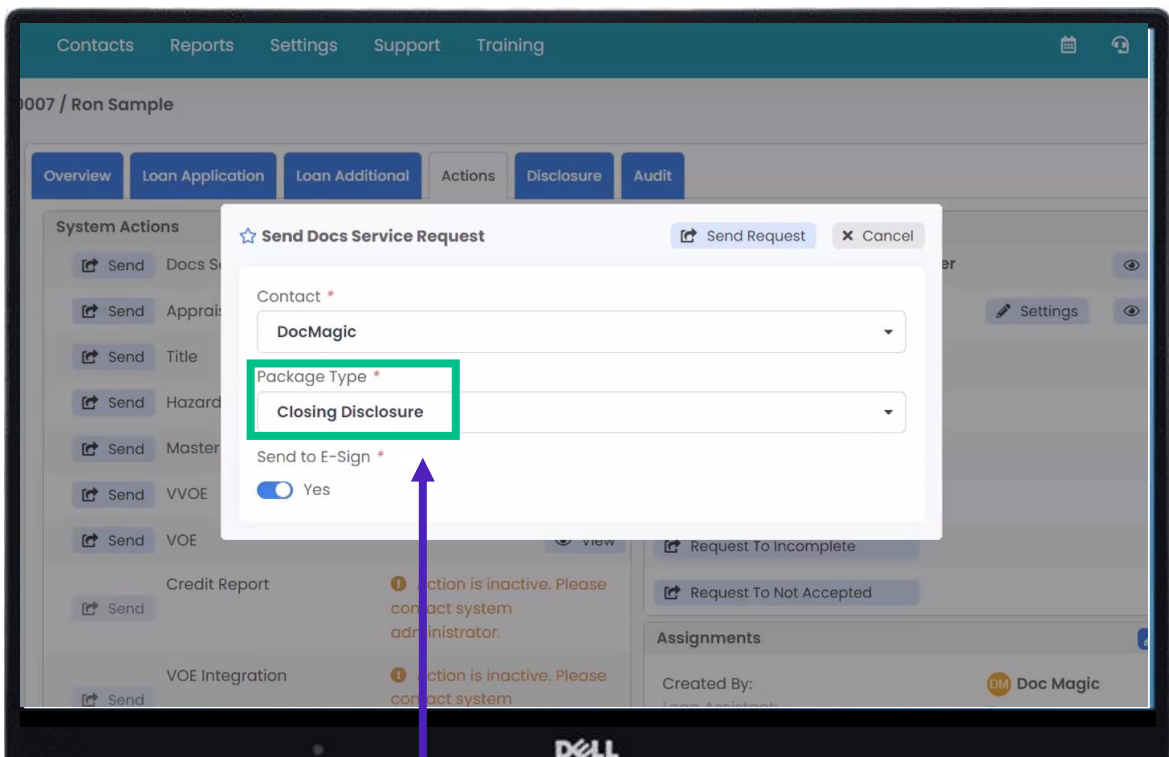You can scroll through and view all the files in the package.
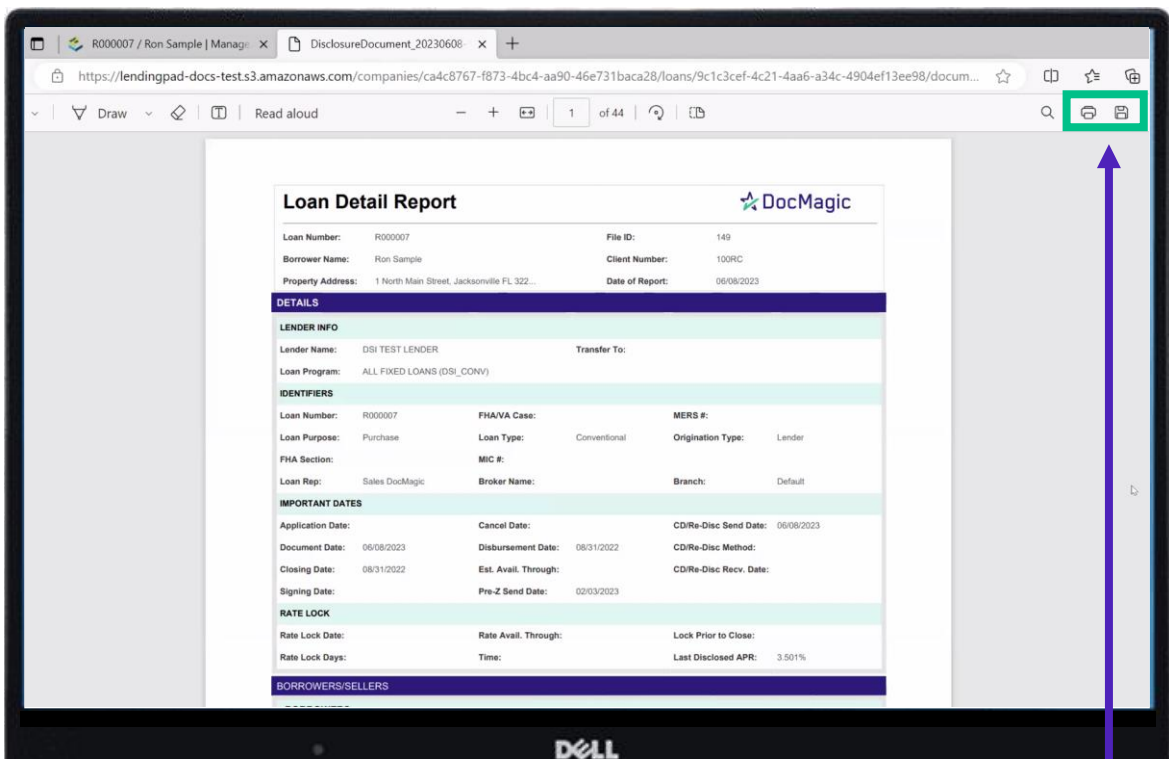
You can also print them or download them to your computer.

LendingPad

Closing Disclosure

Running a Closing Disclosure is very similar to an Initial Disclosure.

Contacts   Reports   Settings   Support   Training

0007 / Ron Sample

Overview   Loan Application   Loan Additional   Actions   Disclosure   Audit

System Actions

Send   Docs S...
Send   Apprais...   Settings
Send   Title
Send   Hazard...

Send Docs Service Request   Send Request   × Cancel

Contact *

DocMagic   ▼

Package Type *

Closing Disclosure   ▼

Send to E-Sign *

🔵 Yes

Send   Master...
Send   VVOE
Send   VOE   View   Request To Incomplete

Credit Report   ❶ ...ction is inactive. Please   Request To Not Accepted
Send   con...act system
                  adm...inistrator.

                                         Assignments

VOE Integration ❶ ...ction is inactive. Please   Created By: DM Doc Magic
Send   con...act system

DELL

From the Disclosure Document Request window, choose the Closing Disclosure option from the dropdown menu, and follow the same steps.

Error

If the Closing Package won't process due to an error, click the dropdown here to see details.

Branch: Default
Status: Application Taken
Purpose: Purchase
Occupancy: Primary Residence
Subject Property: 1 North Main Street
Jacksonville, FL
32218
Duval

Loan Type: Conventional
Program: Conv 30 Year Fix
Total LA: $200,000.00
COC Flag: No
Note Rate: 3.500%
Qualify Expense: $1,348.09

Credit Score: 710
LTV / CLTV / HCLTV: 80.00 / 80.00 / 80.00
AUS: –
Eligible: Yes
Custom Fields: ⓘ

APR: 3.500% / 3.521%
DTI: 0.00% / 0.00%
Expense: $1,348.09 / $1,348.09 ⓘ
Income: $0.00 ⓘ

| Overview | Loan Application | Additional | Actions | Disclosure | Secondary | Fundir |

System Actions ⌃

Send	Credit Report	❶ Action is inactive. Please contact system administrator.
Send	Asset Verification	❶ Action is inactive. Please contact system administrator.
Send	ID Verification	❶ Action is inactive. Please contact system administrator.
Send	Disclosure Document	Error	☰ Hide

⌃ 🗓 Today at 3:34 PM PST   Error ❶

Request:
Contact: 🄐 DocMagic
Package Type: Closing Package
Generated By: 👤 Sales DocMagic

Response:
Error Description: **Code: Failure**
Description:

Fatal. # The Impound Account's Low Balance of $2,700.00 exceeds the Cushion of $900.00..

DELL