



Lending Pad Hacks

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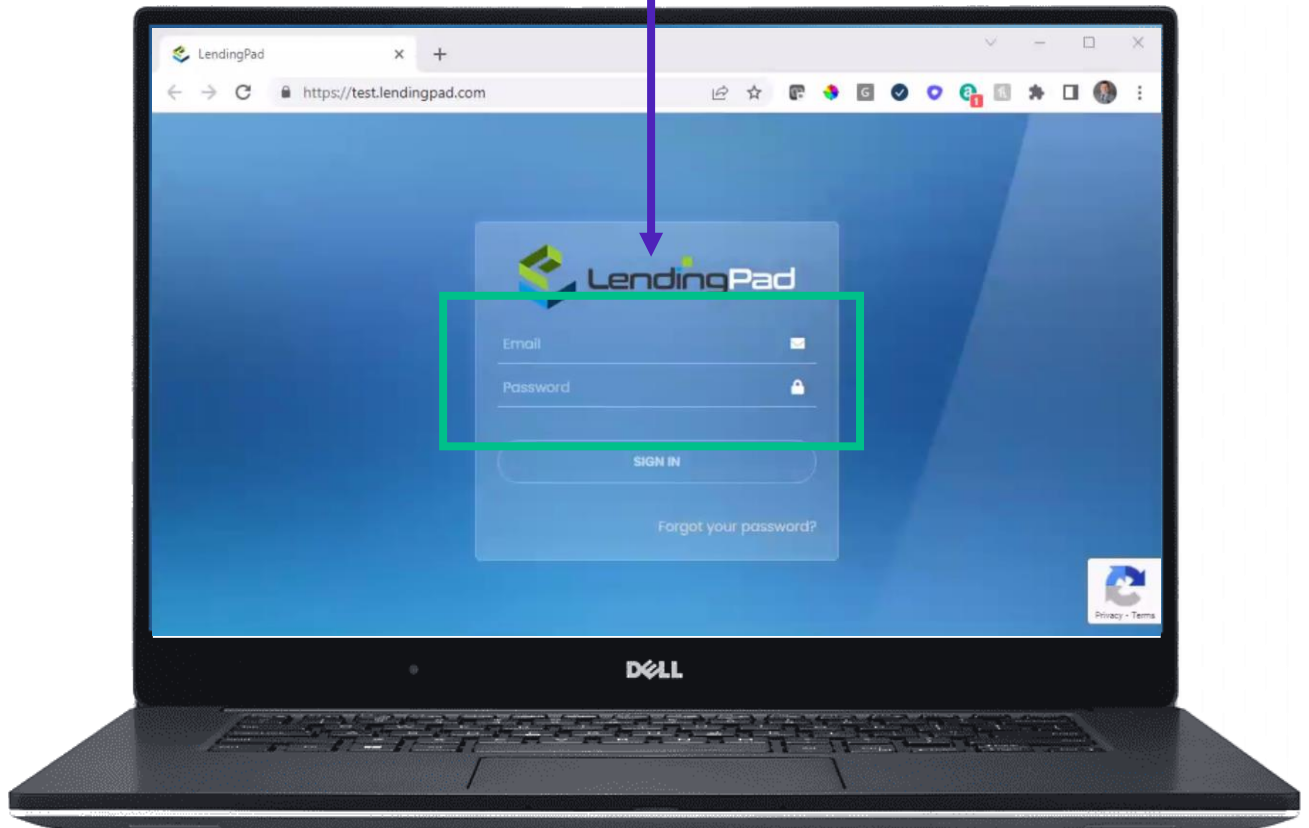


Lending Pad
Supplementary User Guide

LendingPad

Set up DocMagic in LendingPad

Login in with your LendingPad credentials.



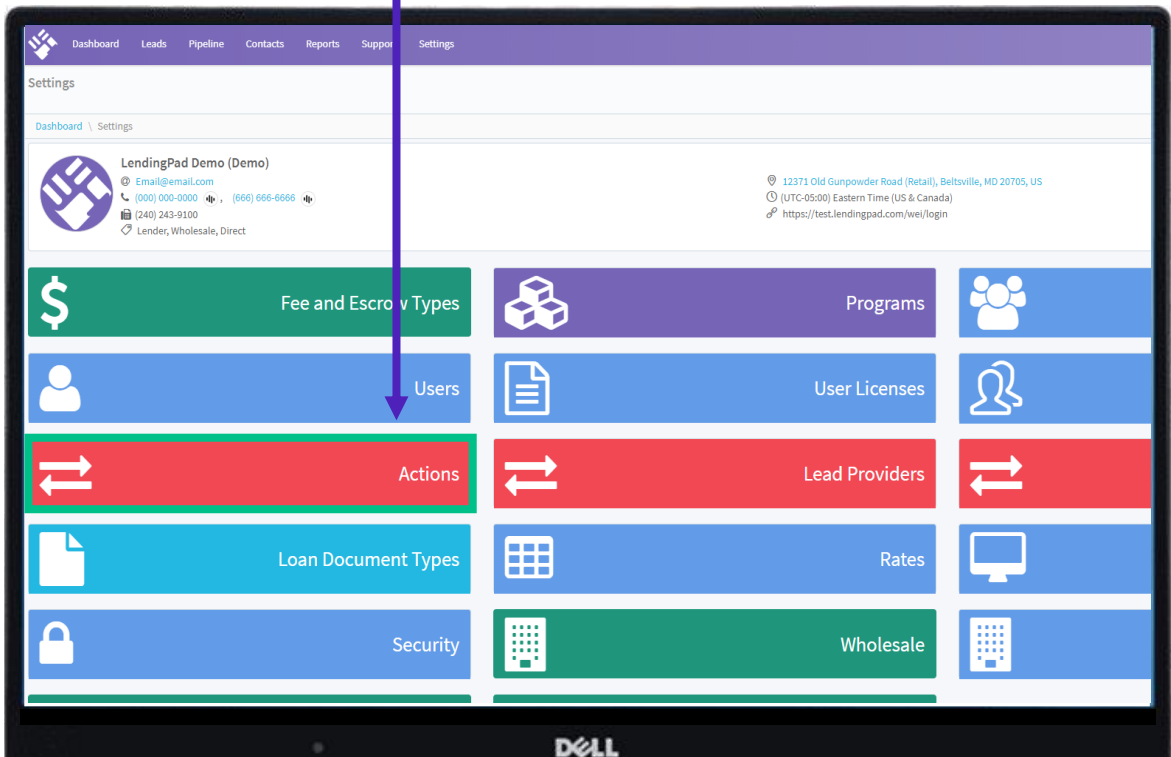
You must login as a System Administrator!



LendingPad

Set up DocMagic in LendingPad

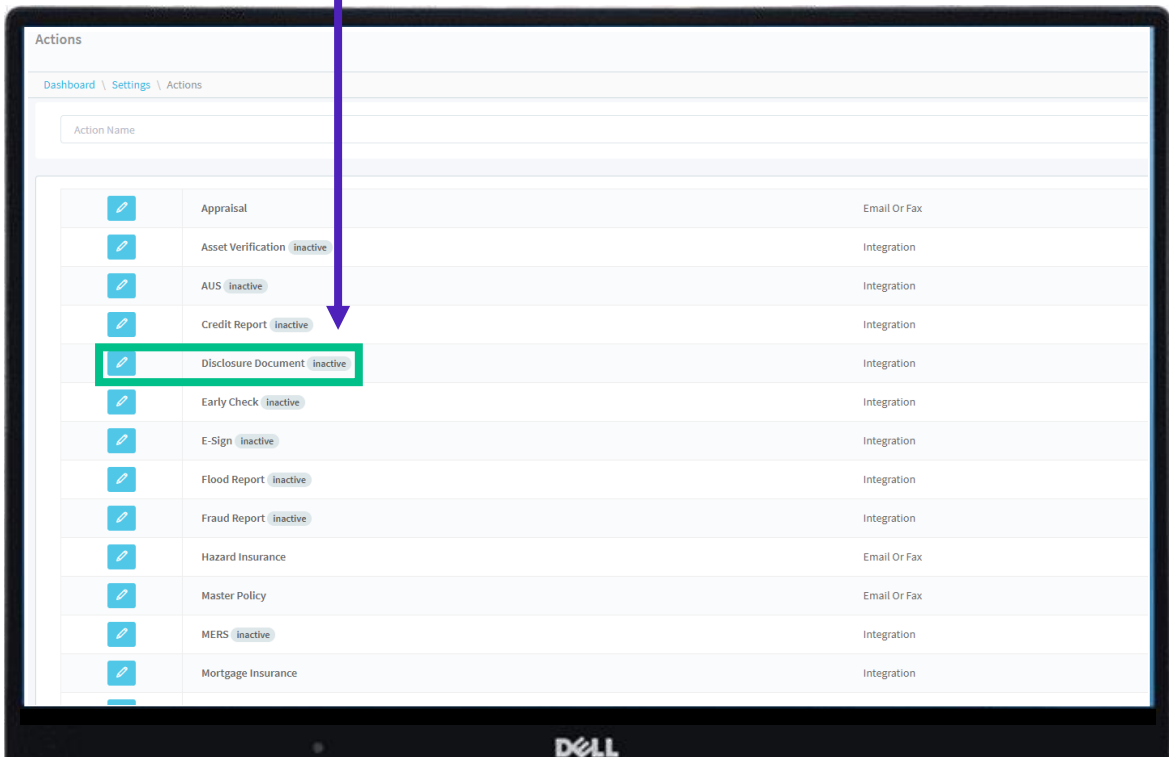
Go to Settings, then Actions.



LendingPad

Set up DocMagic in LendingPad

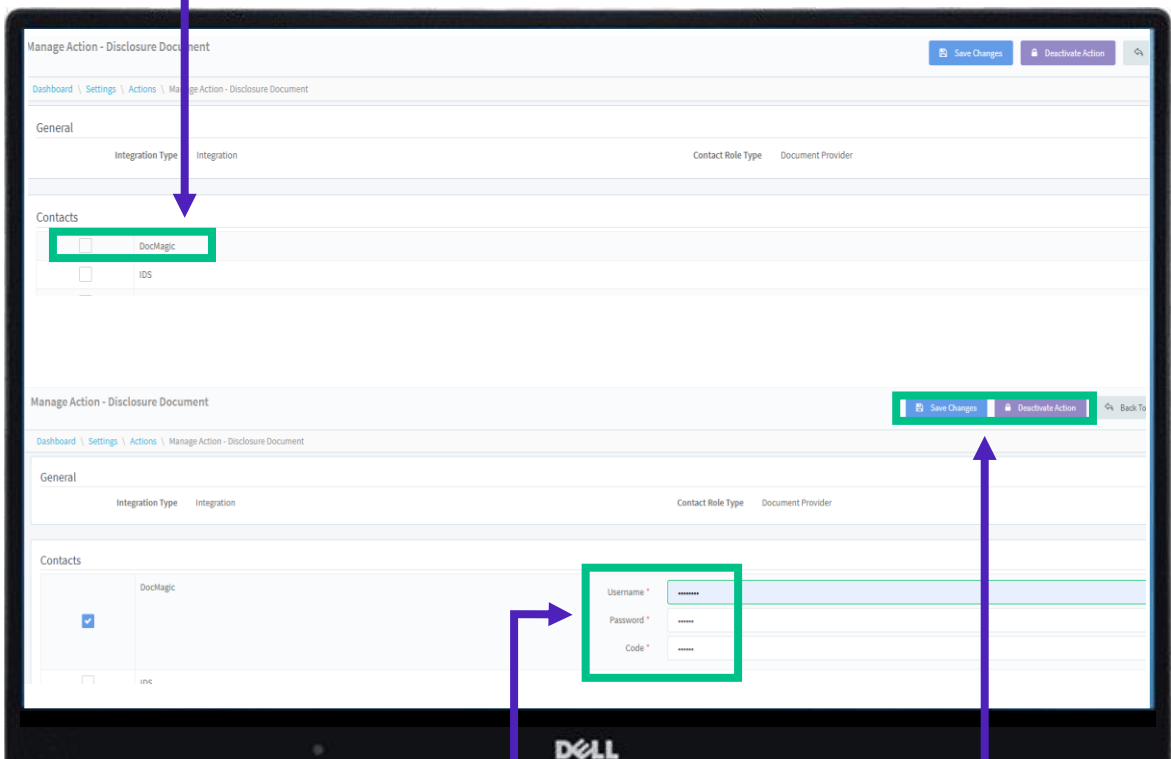
Click on the pencil icon with
"Disclosure Document" action.



LendingPad

Set up DocMagic in LendingPad

Select DocMagic under the contact section.



Enter your username, password, and account code. Save your changes, then go back to the previous page and click on Activate Action.



LendingPad

Run DocMagic in LendingPad

Log into LendingPad and go to the pipeline.

The screenshot shows the LendingPad interface. The top navigation bar includes 'Dashboard', 'Leads', 'Pipeline', 'Contacts', 'Reports', 'Support', and 'Settings'. The 'Pipeline' tab is selected and highlighted with a green box. Below the navigation bar, there are several action buttons: '+ Create New Loan' (highlighted with a green box), 'Import Loans', 'Copy Loans', and 'Delete Loans'. The main content area displays a table of loan records. Each record includes fields for Loan Number, Borrower, Address, Status, Purpose, Amount, Note Rate, and Lending Pad ID. The table contains several rows of demo loan data.

Click on the "Create New Loan" button.



LendingPad

Run DocMagic in LendingPad

Input the required information and click on save.

The screenshot shows the 'Create New Loan' interface in LendingPad. The form is divided into several sections:

- General:** Includes a 'Branch' dropdown menu.
- Borrower #1:** Fields for First Name, Middle Name, Last Name, Email, and Mobile Phone. A note indicates that email and mobile phone are required for pricing.
- Borrower #2:** Fields for First Name, Middle Name, Last Name, Email, Mobile Phone, and a Co-Borrower toggle.
- Subject Property:** Fields for Search (Street, City, State, Zip), Street, City, State, Zip Code, County (with a note to select state and enter zip code first), Property Type (set to 'Attached'), and Units (set to '1').
- Terms and Mortgage:** Fields for Loan Purpose (set to 'Purchase'), Loan Type (set to 'Conventional'), AUS Type (set to 'AUS Type'), Occupancy (set to 'Primary Residence'), Appraisal Value, Purchase Price, Down Payment (set to 0.00%), Loan Amount, and Credit Score.

A blue arrow points from the text box above to the 'Save' button in the top right corner of the form.



LendingPad

Run DocMagic in LendingPad

Assign a Loan Officer under the assignments section by clicking Edit.

The screenshot displays the LendingPad interface for a loan with ID #R000002 / Sammy Sample. The interface is divided into several sections:

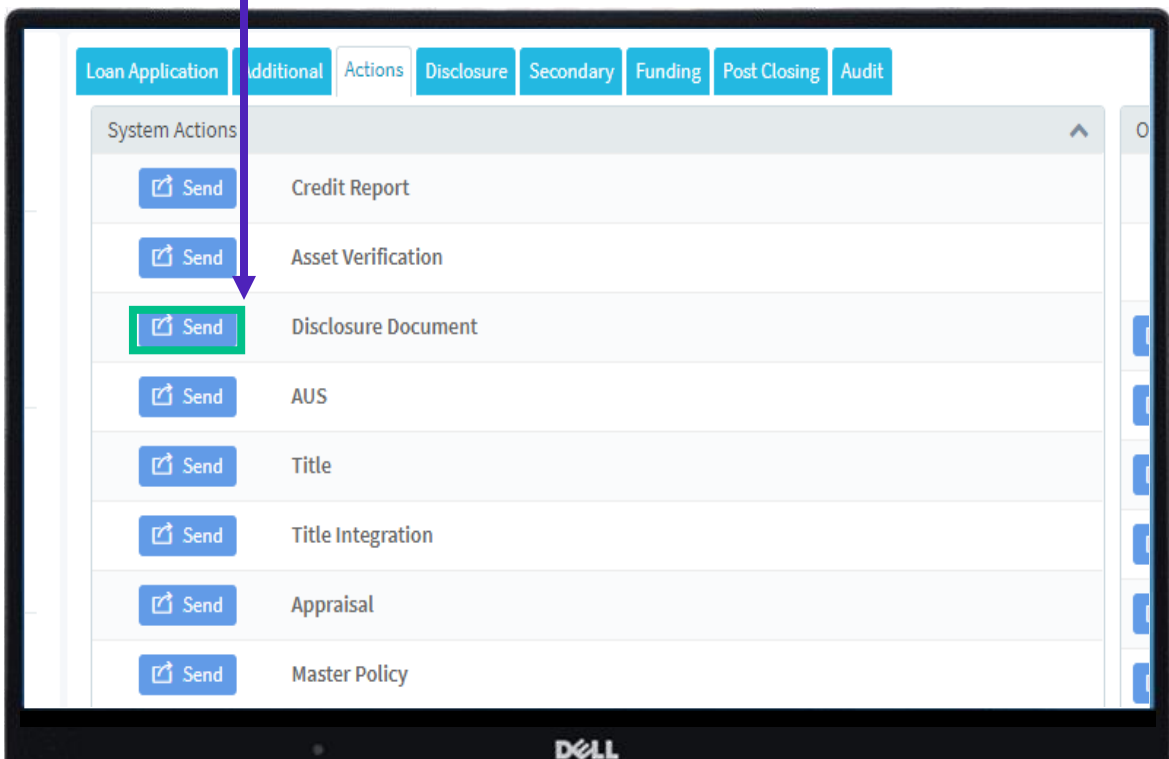
- Overview:** Includes tabs for Loan Application, Additional, Actions, Disclosure, Secondary, Funding, Post Closing, and Audit.
- Branch/Property:** Default Application Taken, Primary Residence, 1 North Main Street, Jacksonville, FL 32218, Duval.
- Loan Details:** Conventional Conv 30 Year Fix, Total LA: \$200,000.00, Note Rate: 3.500%, Qualify: \$1,348.09.
- Terms and Mortgage:** Purpose: Purchase, AUS Type: Primary Residence, Loan Amount: \$200,000.00, Credit Score: 710.
- Subject Property:** Address: 1 North Main Street, Jacksonville, FL 32218, Duval. Property Type: Detached.
- Details of Transaction:** a. Purchase Price: \$250,000.00, f. Estimate Closing: \$2,382.00, l. Total Cost: \$255,599.86.
- Assign:** This section is highlighted with a blue box. It shows 'Loan Officer' as a field with an 'Edit' button next to it. A blue arrow points from the text above to this 'Edit' button.
- Critical Dates:** Estimate Closing: 04/04/2022, LE Issued: 03/01/2022, LE Insurance Due: 03/01/2022, Application Taken: 03/07/2022, Prospect: 03/07/2022, LE Issued: 03/07/2022, LE Delivered: 03/07/2022.
- Loan Originator Information:** Organization Name: DocMagic (DM), Organization Address: 1800 213th Street, Torrance, CA 90501, US, Organization NMLS Id: 123456, Name: Doc Magic, NMLS Id: 4567890, Email: integration@docm.



LendingPad

Run DocMagic in LendingPad

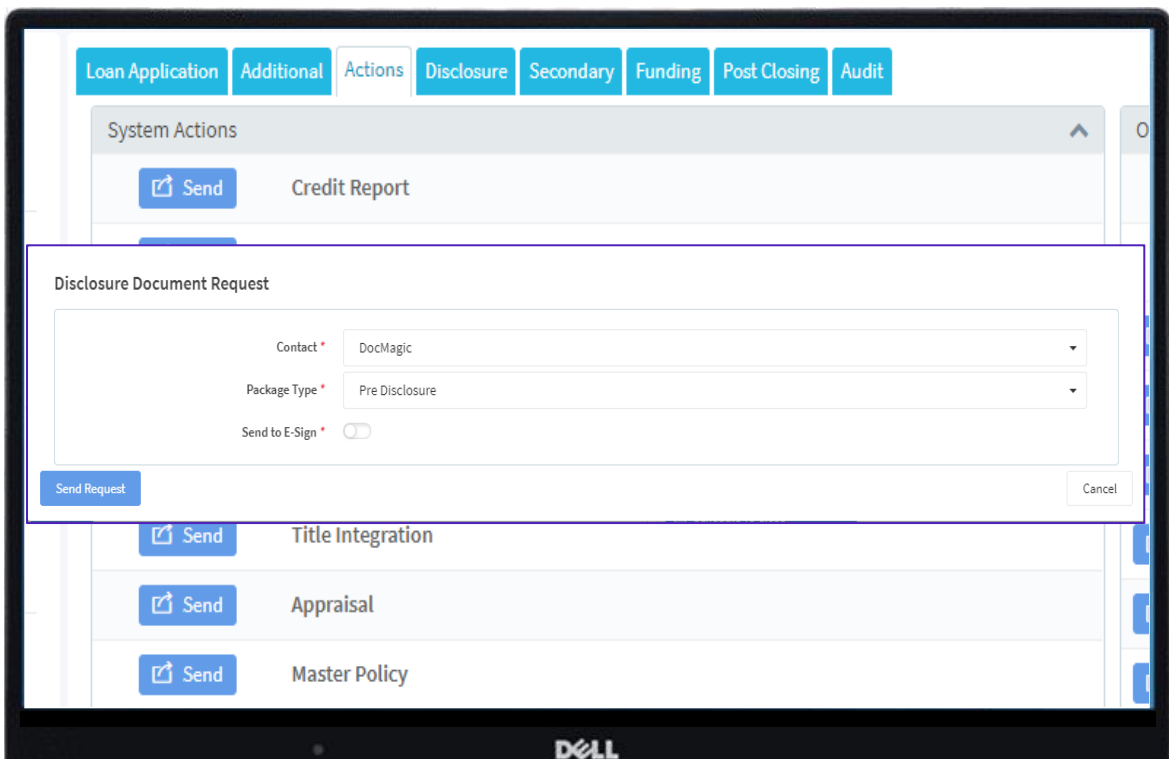
Go to the Actions tab. Click on the Send button under Disclosure Document.



LendingPad

Run DocMagic in LendingPad

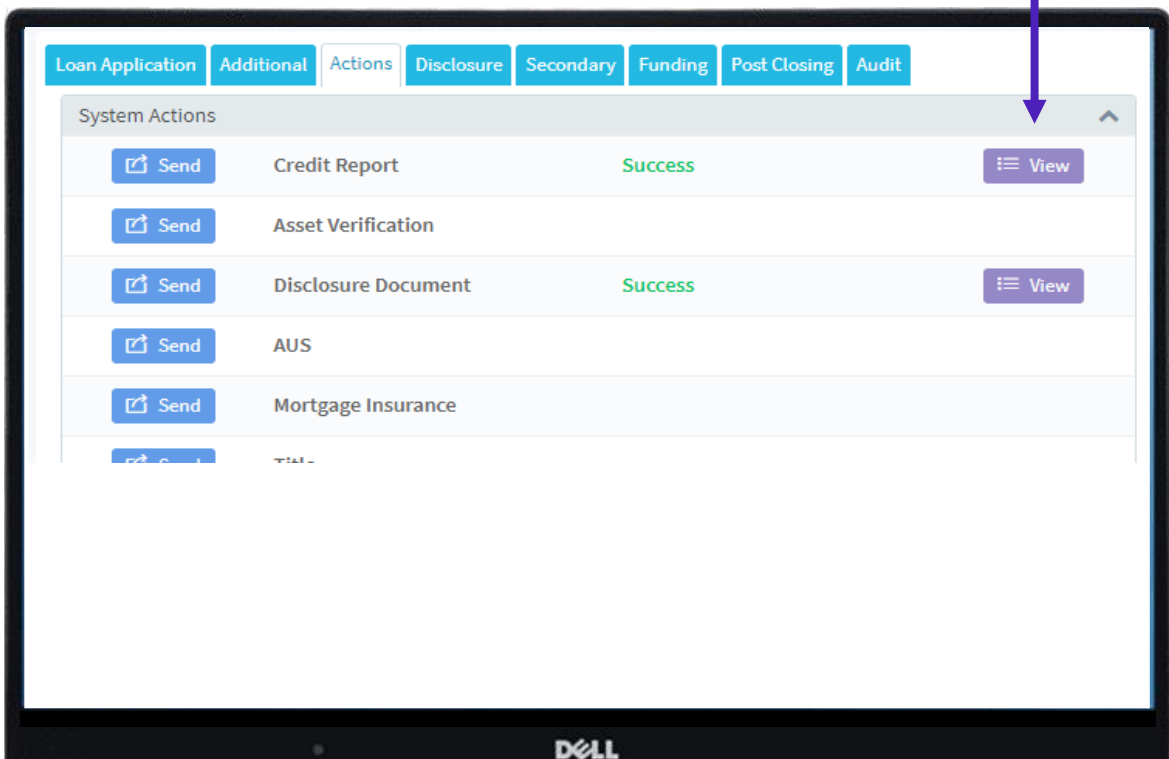
Select the required options and click on send request.



LendingPad

Run DocMagic in LendingPad

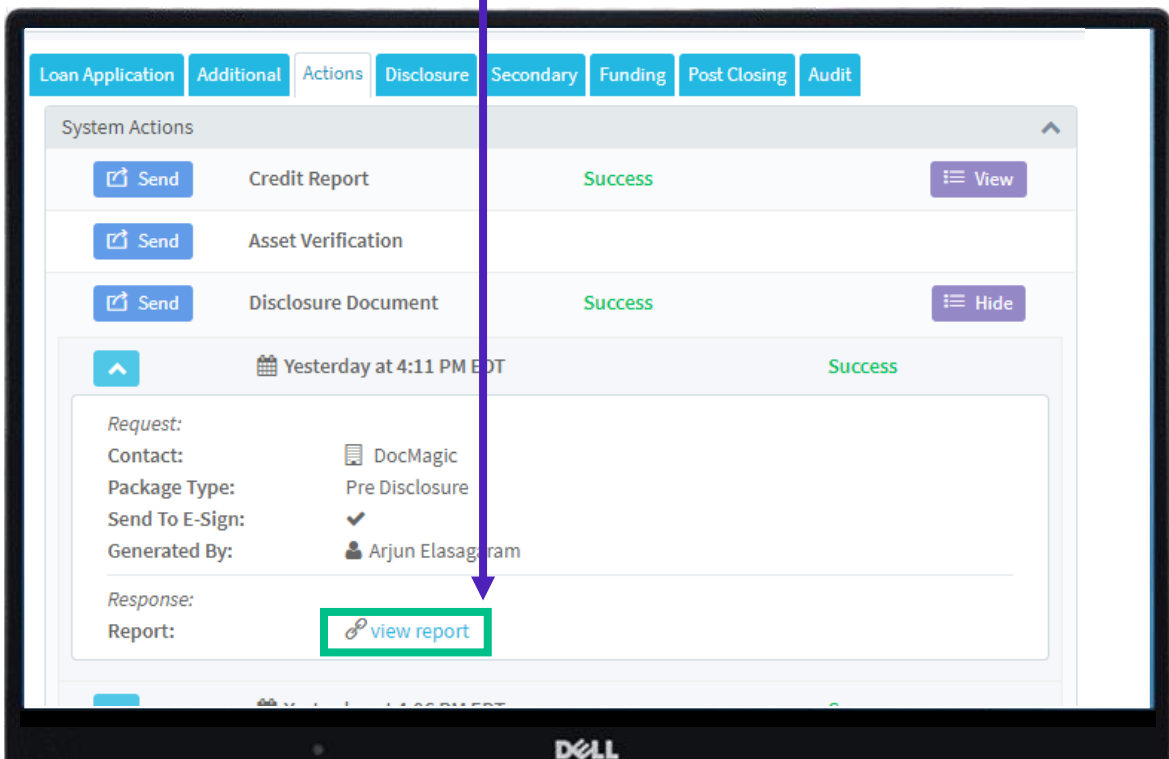
Go back to Actions and click on View to see the response.



LendingPad

Run DocMagic in LendingPad

Click on view report to see the PDF.



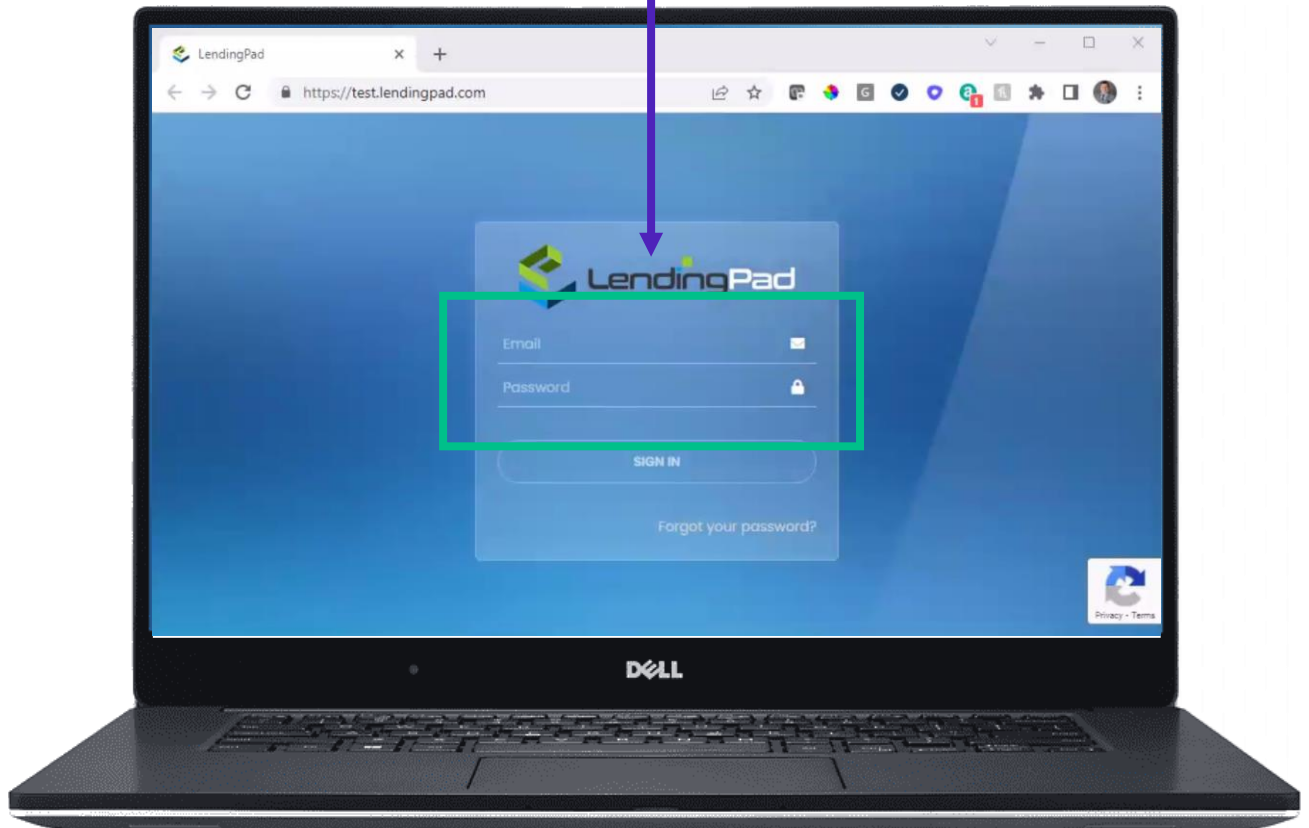


Lending Pad
Managing and Using
DocMagic Plan Codes

LendingPad

Creating/Managing Plan Codes

Login in with your LendingPad credentials.



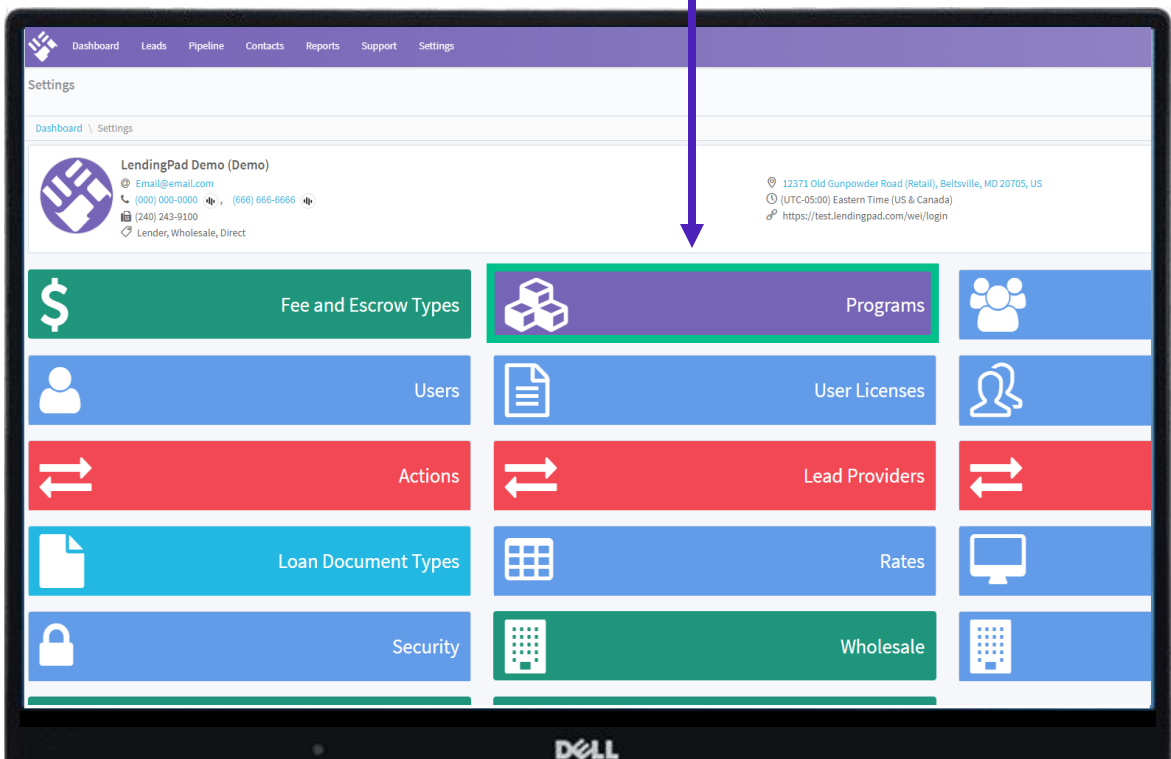
You must login as a System Administrator!



LendingPad

Creating/Managing Plan Codes

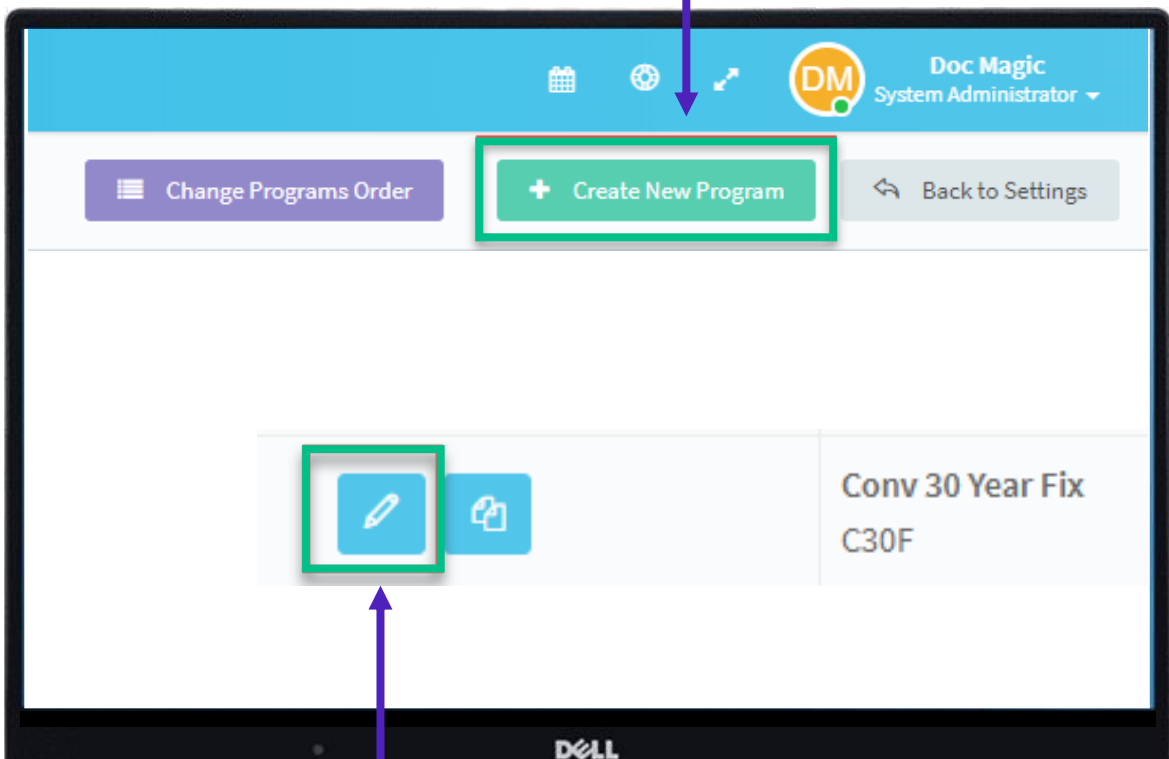
Go to Settings, then Programs.



LendingPad

Creating/Managing Plan Codes

To create a new program or plan code, click "Create New Program" near the top right of the screen.



If managing/updating an existing plan code, click on the pencil next to the existing program.



LendingPad

Creating/Managing Plan Codes

Within the Manage Program screen, the DocMagic plan code should be entered in the "Code" field.

The screenshot shows the 'Manage Program - Conv 30 Year Fix' interface. The breadcrumb trail is 'Dashboard \ Settings \ Programs \ Manage Program - Conv 30 Year Fix'. The 'General' section contains the following fields:

Name *	Conv 30 Year Fix
Short Name *	C30F
Pricing Margin	0.000%
Lock Per Day Fee	0.000%
Code	DSI_CONV
Paper Type	A Paper
Loan Type	Conventional



LendingPad

Using Plan Codes

To use a Program/DocMagic plan code, click the Edit button next to Terms and Mortgage on the Loan Summary page.

Manage Loan #R000002 / Sammy Sample

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: **1**

APR: **3.500% / 3.521%**
DTI: **0.00% / 0.00%**
Expense: **\$1,348.09 / \$1,348.09**

Income: **\$0.00**
URLA: **2020**
Notes: **1**

Overview | **Loan Application** | Additional | Actions | Disclosure | Secondary | Funding | Post Closing | Audit

Assignments | Borrowers | Critical Dates | Custom Fields | Details of Transaction | Interviewer Details | Key Service Providers | Lender Information | Loan Originator Info

Mortgage

Borrowers: **Sammy Sample** SSN: *****-**-0000** (310) 999-6461

Terms and Mortgage **Edit**

Purpose: **Purchase**
AUS Type: **-**
Occupancy: **Primary Residence**

Cash-out Amount: **-**
Appraisal Value: **\$250,000.00**
Purchase Price: **\$250,000.00**
Loan Amount: **\$200,000.00**

Credit Score: **710**
Loan Type: **Conventional**
Program: **Conv 30 Year**
Fix
Note Rate: **3.500%**
Escrow Waiver:

Key Service Providers **Edit**

Appraiser
Company:
Closing Agent:

Subject Property **Edit**

Address **Valid** **AVM Check**
1 North Main Street
Jacksonville, FL 32218
Duval

Property Type: **Detached**
Units: **1**
Amount Existing Liens: **-**
Original Cost: **-**
Year Built: **-**
Year Acquired: **-**
Legal Description: **-**

Proposed Housing Expense
First Mortgage: **\$898.09**
Other Finance: **\$0.00**
Hazard Insurance: **\$200.00**
Property Tax: **\$250.00**
Mortgage Insurance: **\$0.00**
HOA: **-**
Other: **-**
Total Amount: **\$1,348.09**

Details of Transaction **Edit**

a. Purchase Price: **\$250,000.00**
b. Alterations: **-**
c. Land: **-**
d. Refinance: **-**
e. Estimated Prepaid Items: **\$3,217.86**
f. Estimate Closing Cost: **\$2,382.00**
g. PMI, MIP, Funding Fee: **\$0.00**
h. Discount: **\$0.00**
i. Total Cost: **\$255,599.86**

j. Subordinate Financing: **\$0.00**
k. Seller Paid Closing Cost: **\$0.00**
n. PMI, MIP, Funding Fee financed: **\$0.00**
o. Total Loan Amount: **\$200,000.00**
p. Cash from / to Borrower: **\$55,599.86**

Your changes will show here.

