

Lending Pad Hacks

Supplementary User Guide Page 2

Managing and Using Page 14 DocMagic Plan Codes



Set up DocMagic in LendingPad

Login in w	ith your Le	ndingPad c	redentials.	
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← → C ● https://test.lendingpad	Email Password			
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You must login as a System Administrator!



Set up DocMagic in LendingPad

	Go to S	Settings, th	nen Actions.	
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Set up DocMagic in LendingPad

	Click on the pencil icon with "Disclosure Document" actio	า ท.
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Action Name		
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Set up DocMagic in LendingPad

	Select DocMagic	under the contact section.	
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	Enter your usernar	me, password, and account	
	code. Save vour ch	hanges, then go back to the	1
	-		1
	previous page ar	nd click on Activate Action.	



Run DocMagic in LendingPad

Log into LendingPad and go to the pipeline.

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Click on the "Create New Loan" button.



Run DocMagic in LendingPad

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\$ First Name	First Name	First Name	First Name	
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\$ Last Name		Last Name	Last Name	
\$ Email		Email	Email	
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Subject Property		Terms and Mortgage		
Search	O Street, City, State, Zip	Loan Purpose	Purchase	•
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ci	ty City	AUS Type	AUS Type	•
Sta	te State 👻	Occupancy	Primary Residence	•
Zip Co	de Zip Code	Appraisal Value	\$0	
Coun		Purchase Price	\$0	
Property Typ		Down Payment ①	0.00%	
Unit	s 1	Loan Amount ①	so 0	
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Run DocMagic in LendingPad

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

Branch: Status: Purpose: Docupancy: Subject Property:	Default Application Taken Purchase Primary Residence 1 North Main Street Jacksonville, FL	Mortgage Borrowers				vice Providers Lender Informati			ect.Property Terms and	<
roperty.	32218 Duval	Sammy Sample	✓ Edit ▲	Subject Property	-++-0000	J (310) 999- Details of Transaction	5461 🚸	Assign	com	
Loan Type: Program: Total LA: COC Flag: Note Rate:	Conventional Conv 30 Year Fix \$200,000.00 No 3.500%	Purpose: AUS Type: Occupancy:	Purchase - Primary Residence	Address volla 1 North Main Street Jacksonville, FL 32218 Duval	AVM Check	a. Purchase Price: b. Alterations: c. Land: d. Refinance: e. Estimated Prepaid	\$250,000.00 - - \$3,217.86	Cred By: Loan Officer:	Sales DocMagic	
Qualify Expense:	\$1,348.09	Cash-out Amount: Appraisal Value:	- \$250,000.00	Property Type: Units:	Detached	tems: f. Estimate Closing	\$2,382.00	Underwriter: Closer:	-	Ľ
TV / CLTV /	710 80.00 / 80.00 / 80.00	Purchase Price: Loan Amount:	\$250,000.00 \$200,000.00	Amount Existing Liens: Original Cost: Year Built:		Cost: g. PMI, MIP, Funding Fee h. Discount:	\$0.00	Funder: Post Closer:	ŝ	Ľ
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Run DocMagic in LendingPad

Go to the Actions tab. Click on the Send button under Disclosure Document. Actions Disclosure Secondary Funding Post Closing Audit Loan Application dditional System Actions C Credit Report Asset Verification 🖆 Send **Disclosure Document** AUS Title 🖆 Send **Title Integration** Appraisal Master Policy DELL



Run DocMagic in LendingPad

Select the required options and click on send request.

Loan Application Additional	Actions Disclosure Secondary Funding Post Closing Audit	
System Actions	-	0
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Disclosure Document Request		
Contact *	DocMagic -	
Package Type *	Pre Disclosure	
Send to E-Sign *		
Send Request		Cancel
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Run DocMagic in LendingPad

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

Loan Application Ad	ditional Actions Disclosure Se	econdary Funding Post Closing A	Audit
System Actions			· ^
I Send	Credit Report	Success	[≔ View]
🗹 Send	Asset Verification		
C Send	Disclosure Document	Success	[i≡ View]
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Run DocMagic in LendingPad

	Click on view report to see the PDF.					
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Loan Application Ad	ditional Actions Disclosure	Secondary Funding Post Closir	ng Audit			
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Lending Pad Managing and Using DocMagic Plan Codes

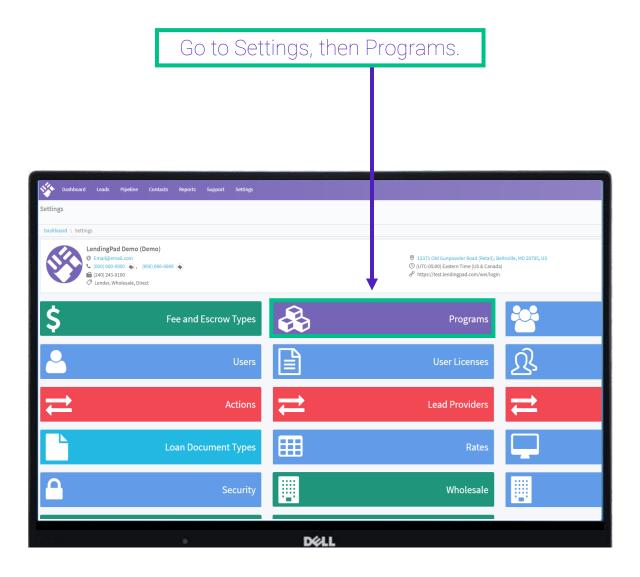
Creating/Managing Plan Codes

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\mathcal{C} LendingPad \times + \mathcal{C} $\stackrel{\circ}{\to}$ \mathcal{C} $\stackrel{\circ}{\bullet}$ https://test.lendingpad.	com	e 🖈 💽 🍨	• • • • • • • • • • • • • • • • • •	
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You must login as a System Administrator!



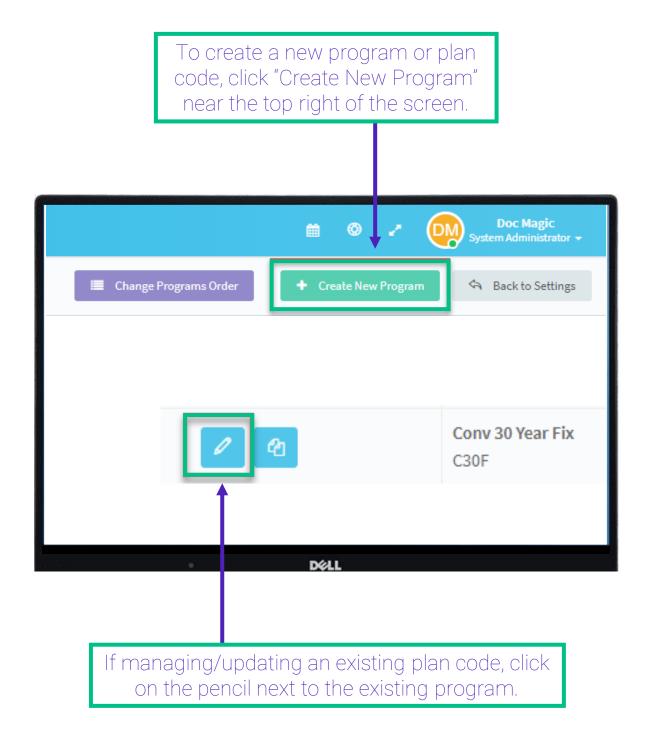
Creating/Managing Plan Codes





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Creating/Managing Plan Codes





Creating/Managing Plan Codes

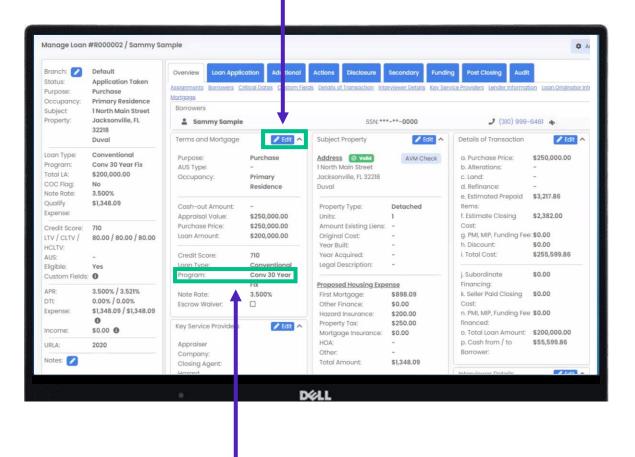
Within the Manage Program screen, the DocMagic plan code should be entered in the "Code" field.

Manage Program - Conv 30 Year Fix	
Dashboard \ Settings \ Programs \ Manage Program - Conv 30	Year Fix
General	
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
DØLL	



Using Plan Codes

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



Your changes will show here.

