

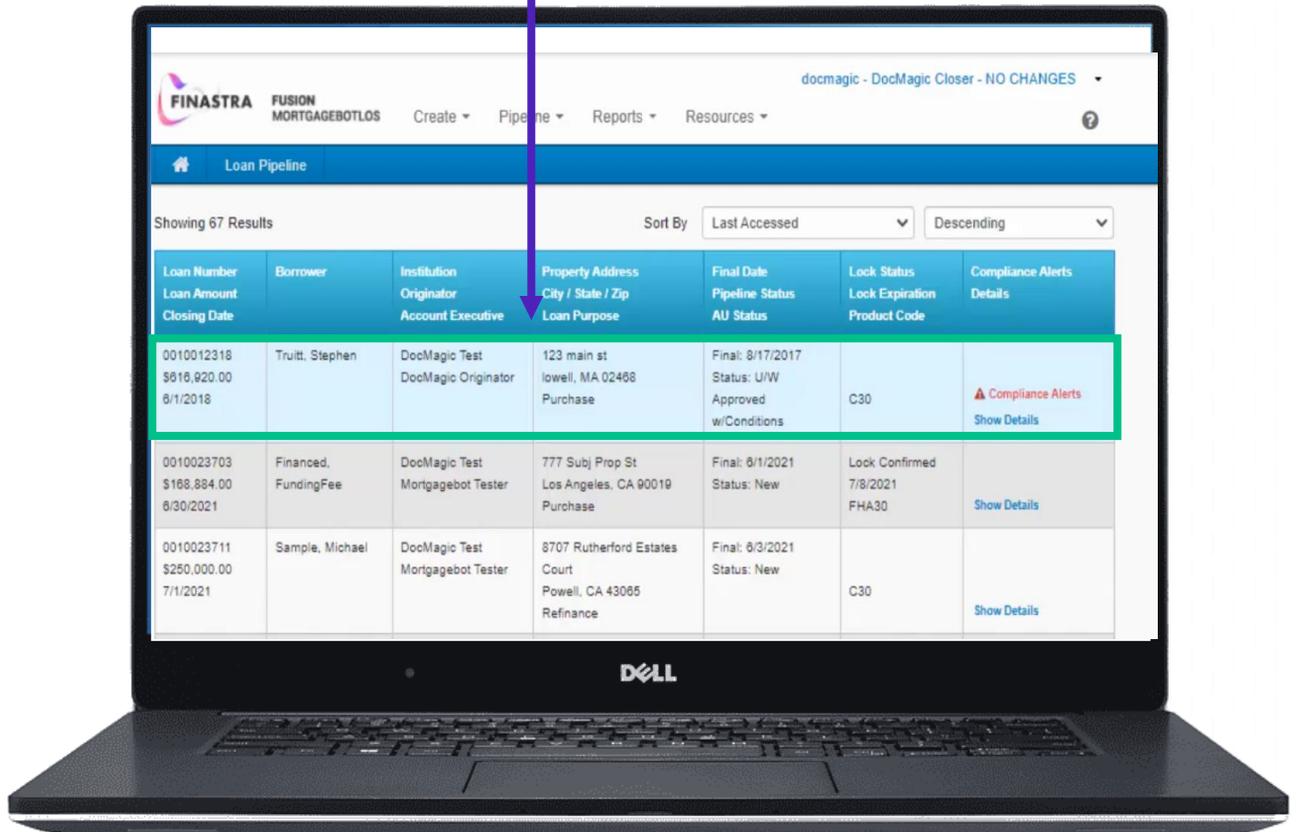


Processing Initials and CDs
and
Closing Packages

MortgageBot

Getting Started w/ Initial Disclosures

First, you'll want to search for the loan package you want to process.



We'll start with an Initial Disclosure,
then do a Closing Package.



MortgageBot

Check Borrower Information

Make sure that the Borrower's information is correct.

The screenshot displays the MortgageBot interface for loan 0010000123 - Daniel Sample. The left sidebar contains a 'Forms & Documents' menu with 'Borrower Summary' highlighted. The main content area shows loan details and borrower information sections.

Loan Details

Final:	9/10/2013	Product Code:	C30
Loan Amount:	\$400,000.00	Rate:	3.750%
Loan Purpose:	Refinance	APR:	3.840%
Institution:	DocMagic Test (DM)	P & I:	\$1,250.00
Loan Status:	U/W Assigned	PITI:	\$1,467.00
AU Status:		Lock Status:	Not Locked
Property Address:	19991a East Eubank Street #C27 GAINESVILLE, FL 32614	Lock Expiration:	
Appraised Value:	\$315,300.00	Cash To Close:	(\$333,004.31)
		Closing Date:	8/31/2013

Borrower Information [Show](#)

Assigned To [Show](#)

Ratios [Show](#)



MortgageBot

Order Your Document Package

From Doc Packages, choose Order Document Package.

The screenshot shows the 'Order Document Package' interface in the MortgageBot system. The interface includes a top navigation bar with the FINASTRA logo and 'FUSION MORTGAGEBOTLOS' text. Below this is a breadcrumb trail: 'Loan Pipeline' > '0010012318 - Sample'. The main content area is titled 'Order Document Package' and contains several sections:

- Document Engine:** A dropdown menu set to 'DocMagic'.
- Document Package Type:** A dropdown menu set to 'Initial Disclosure'.
- Request Type:** A dropdown menu set to 'Complete Package'.
- Language:** A dropdown menu set to 'English'.
- Document Format:** A dropdown menu set to 'PDF'.
- Plan Code:** A dropdown menu set to 'CONV -- Conventional: ALL FIXED LOANS'.
- Alt Lender Code:** An empty text input field.
- eClosing Provider:** A dropdown menu.
- Options:** A list of checkboxes for 'eDisclosure', 'Click Sign', 'Mail Out To Borrower', 'Include Demographic Information Addendum in returned loan application', and 'Event Notification'.

The left sidebar contains a search bar and a list of menu items: 'Forms & Docs', 'Doc Packages', 'Closing Docs', 'Services', and 'Actions'. The 'Doc Packages' item is highlighted with a blue background, and the 'Order Document Package' sub-item is highlighted with a green border. A blue arrow points from the text box above to this sub-item.



MortgageBot

Order Your Document Package

Choose your package type from the dropdown menu here.

The screenshot shows the 'Order Document Package' interface in the MortgageBot system. The page title is 'Order Document Package'. The interface includes a sidebar with navigation options: 'Forms & Docs', 'Doc Packages' (selected), 'Closing Docs', 'Services', and 'Actions'. The main content area contains several fields and a dropdown menu:

- Document Engine:** DocMagic
- Request Type:** Complete Package
- Document Format:** PDF
- Plan Code:** CONV -- Conventional: ALL FIXED LOANS
- Alt Lender Code:** (empty field)
- Options:** eDisclosure, Click Sign, Mail, Include Demographic Information Addendum in return, Event Notification
- Document Package Type:** A dropdown menu is open, showing a list of package types: Initial Disclosure (highlighted), Prequalification, Redisclosure, Processing, Underwriting, Closing Disclosure, Pre-Closing Package, Servicing Transfer Package, Adverse Action, eConsent Package, Point Of Sale Package, Loan Application Package, Loan Approval Package, Rate Lock Package, Post-Closing Package, Appraisal Package, and UCD Package.

Note that you have the option for both Initial and Closing Disclosures.



MortgageBot

But First, You Should Run an Audit

We recommend that you **audit** first. You can do so by choosing Audit Only in the Request Type.

The screenshot shows the 'Order Document Package' form in the Finastra Fusion MortgageBot interface. The form includes the following fields and options:

- Document Engine:** DocMagic
- Document Package Type:** Initial Disclosure
- Request Type:** Audit Only (highlighted with a green box and a purple arrow pointing to it from the text above)
- Language:** English
- Event Notification
- Additional Data

A purple arrow points from the 'Submit' button at the bottom right of the form to the text below.

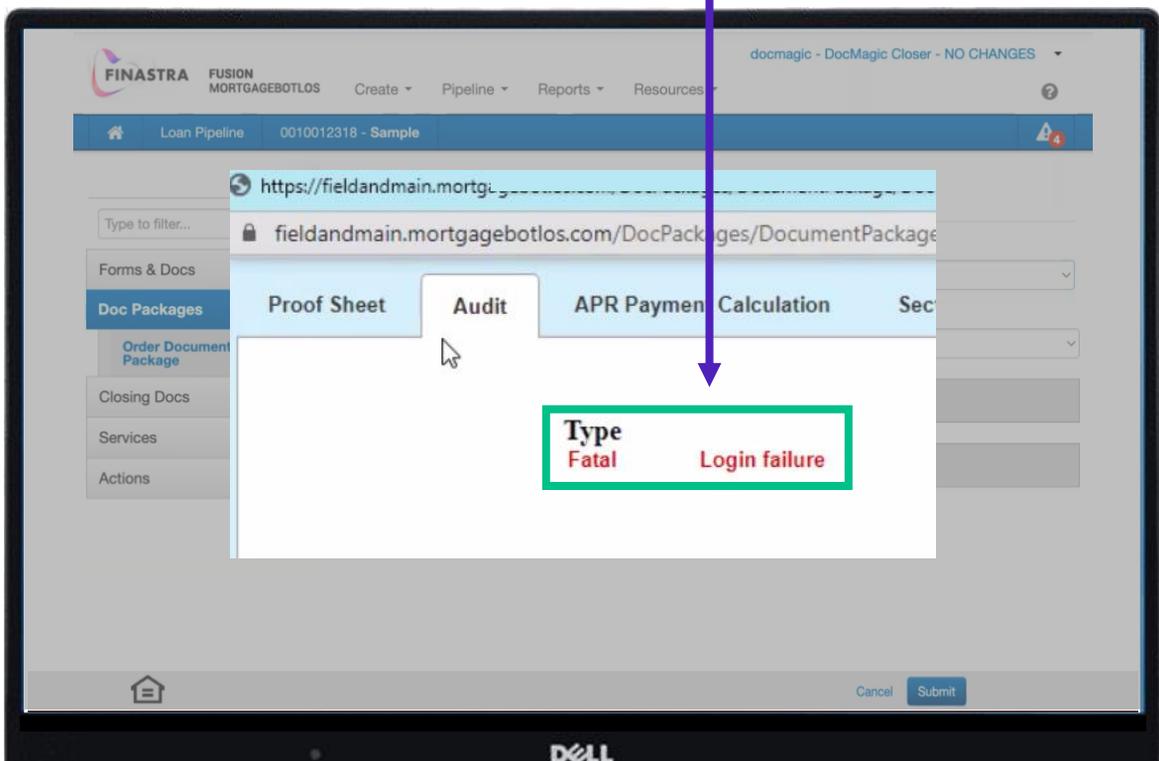
Then, click Submit.



MortgageBot

Fatal Error

If you see this Fatal Login failure, it means that you might be submitting from the wrong account.



For example, if you are logged into DocMagic with Account A but logged into the LOS with Account B, you might get this error. Also, you might need to be logged into MortgageBot with the Loan Originator's account, instead of the processor or lender.



MortgageBot

Loan Detail Report

You can review the Loan Detail Report as well as the full set of Documents before processing them.

Loan Details Report

File

Loan Detail Report

DocMagic

Loan Number:	77702280712	File ID:	2376
Borrower Name:	JOHN SMITH	Client Number:	100SALES
Property Address:	935 WILLOW STREET, BURLINGTON NJ 08016	Date of Report:	03/03/2022

Transaction Details | Data Validation | Compliance Audit | Collapse all

DETAILS

LENDER INFO

Lender Name:	DSI TEST LENDER (SALES)	Transfer To:	
Loan Program:	ALL FIXED LOANS (DSI_CONV)		

LOAN IDENTIFIERS

Loan Number:	77702280712	FHA/VA Case:		MERS #:	9999353-7702280712-2
Loan Purpose:	Purchase	Loan Type:	Conventional	Origination Type:	Lender
FHA Section:		MIC #:			
Loan Rep:		Broker Name:		Branch:	

IMPORTANT DATES

Application Date:	11/01/2018	Cancel Date:		CD/Re-Disc. Send Date:	
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DELL



MortgageBot

When You're Ready to Process

DocMagic is the default Document Engine. Select Initial Disclosures from the Document Package Type.

The screenshot shows the 'Order Document Package' form in the Finastra MortgageBot interface. The form is displayed on a Dell monitor. A purple arrow points from the text box above to the 'Document Package Type' dropdown menu, which is set to 'Initial Disclosure'. Another purple arrow points from the text box below to the 'Request type' dropdown menu, which is set to 'Complete Package'. The form includes fields for Document Engine (DocMagic), Language (English), Document Format (PDF), Plan Code (CONV -- Conventional: ALL FIXED LOANS), Alt Lender Code, eClosing Provider, and checkboxes for eDisclosure, Click Sign, Mail Out To Borrower, Event Notification, and Additional Data. A 'Submit' button is visible at the bottom right.

Choose "Complete Package" under Request Type.



MortgageBot

When You're Ready to Process

Select PDF or DBK from Document Format.

The screenshot displays the 'Order Document Package' form in the Finastra MortgageBot interface. The form includes the following fields and options:

- Document Engine:** DocMagic
- Document Package Type:** Initial Disclosure
- Request Type:** Complete Package
- Language:** English
- Document Format:** PDF
- Plan Code:** CONV -- Conventional: ALL FIXED LOANS
- Alt Lender Code:** (empty)
- eClosing Provider:** (empty)
- eDisclosure
- Click Sign
- Mail Out To Borrower
- Include Demographic Information Addendum in returned loan application
- Event Notification
- Additional Data

At the bottom of the form, there are 'Cancel' and 'Submit' buttons. The Dell logo is visible at the bottom center of the screen.

Choose your Plan Code.



MortgageBot

When You're Ready to Process

Click eDisclosure and Click Sign for eSignature capture.

The screenshot shows the 'Order Document Package' form in the Finastra Fusion MortgageBotLOS system. The form is titled 'Order Document Package' and is part of a loan pipeline for '0010000123 - Truitt'. The form includes several sections:

- Document Engine:** DocMagic
- Document Package Type:** Initial Disclosure
- Request Type:** Complete Package
- Language:** English
- Document Format:** PDF
- Plan Code:** CONV -- Conventional: ALL FIXED LOANS
- Alt Lender Code:** (empty)
- eClosing Provider:** (empty)
- Checkboxes:**
 - eDisclosure
 - Click Sign
 - Mail Out To Borrower
 - Include Demographic Information Addendum in returned loan application
 - Event Notification
 - Additional Data

A green box highlights the 'eDisclosure' and 'Click Sign' checkboxes. A blue arrow points from the text 'Click eDisclosure and Click Sign for eSignature capture.' to this box. Another blue arrow points from the text 'Click Submit.' to the 'Submit' button at the bottom right of the form.

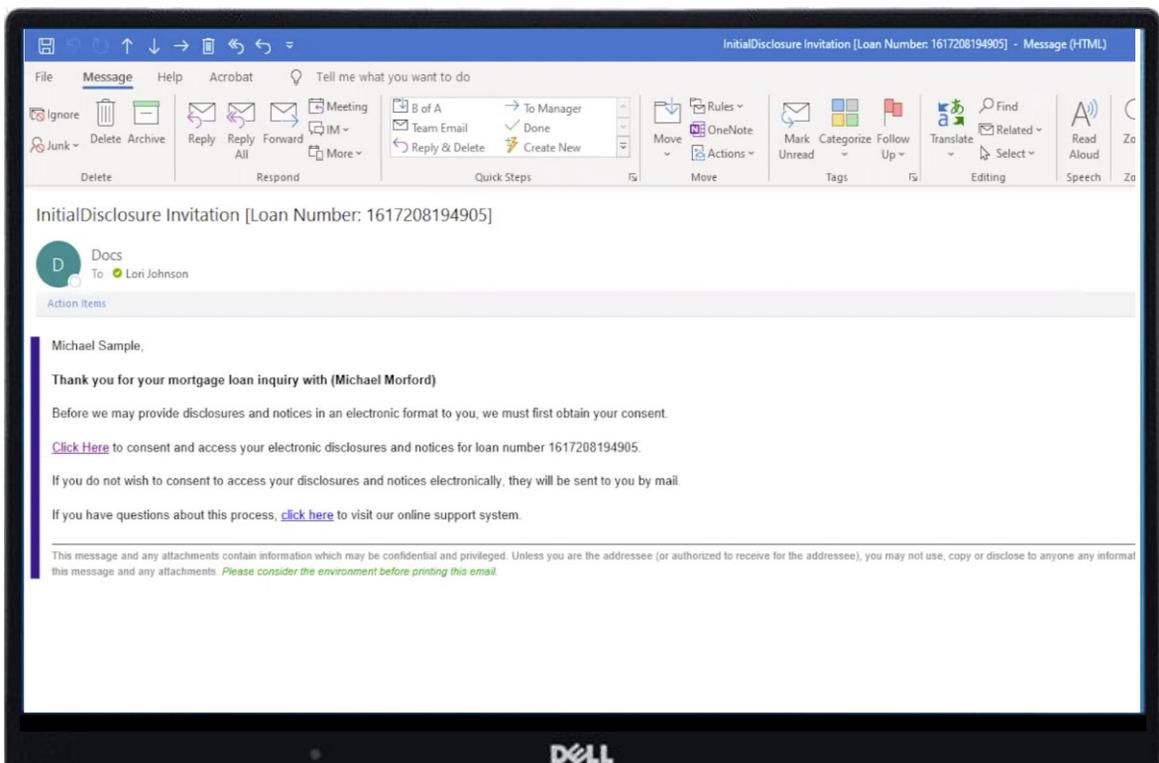
Click Submit.



MortgageBot

Participant Invitation

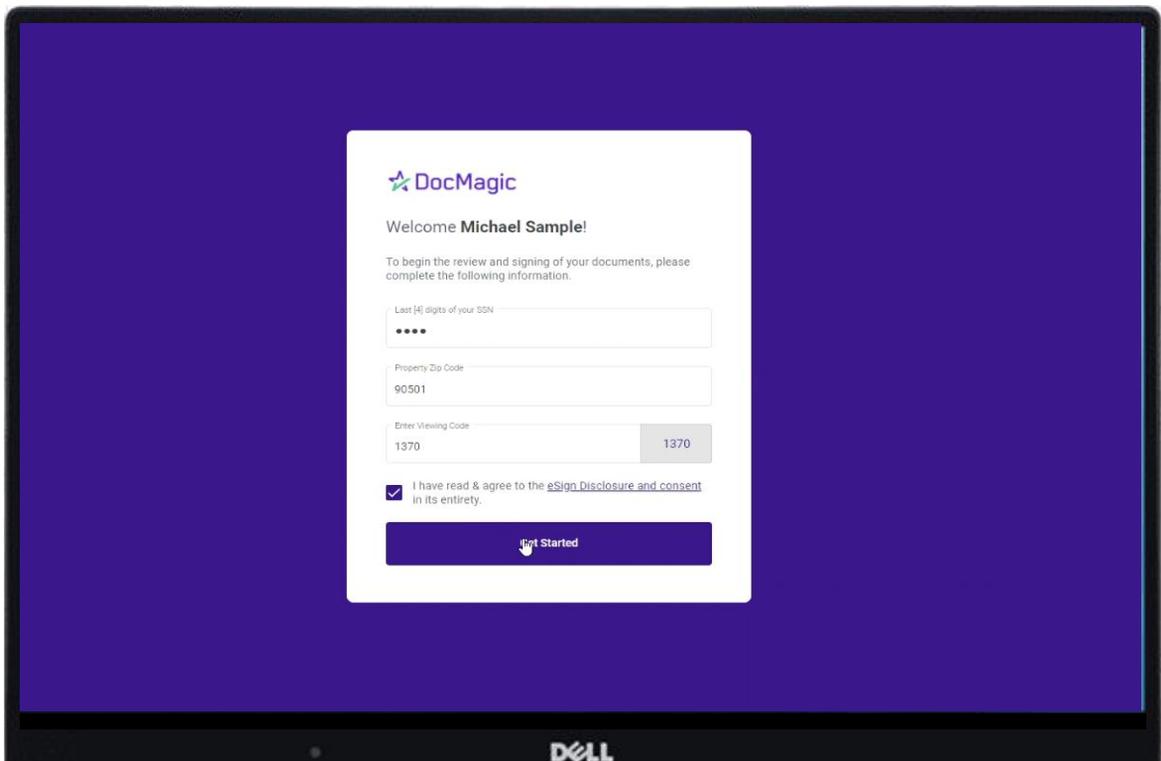
Participants will receive this email inviting them to the signing experience.



MortgageBot

Verification Page

They will log into the eSign experience from this verification page and sign the Initial Disclosures.



The screenshot shows a Dell monitor displaying the DocMagic verification page. The page has a dark blue background with a white central form. The form contains the following elements:

- DocMagic logo (a star icon followed by the text "DocMagic")
- Greeting: "Welcome **Michael Sample!**"
- Instruction: "To begin the review and signing of your documents, please complete the following information."
- Input field: "Last [4] digits of your SSN" with a masked value "****".
- Input field: "Property Zip Code" with the value "90501".
- Input field: "Enter Viewing Code" with the value "1370" and a "1370" button to the right.
- Checkbox: "I have read & agree to the [eSign Disclosure and consent](#) in its entirety." (checked).
- Button: "Get Started" with a mouse cursor over it.

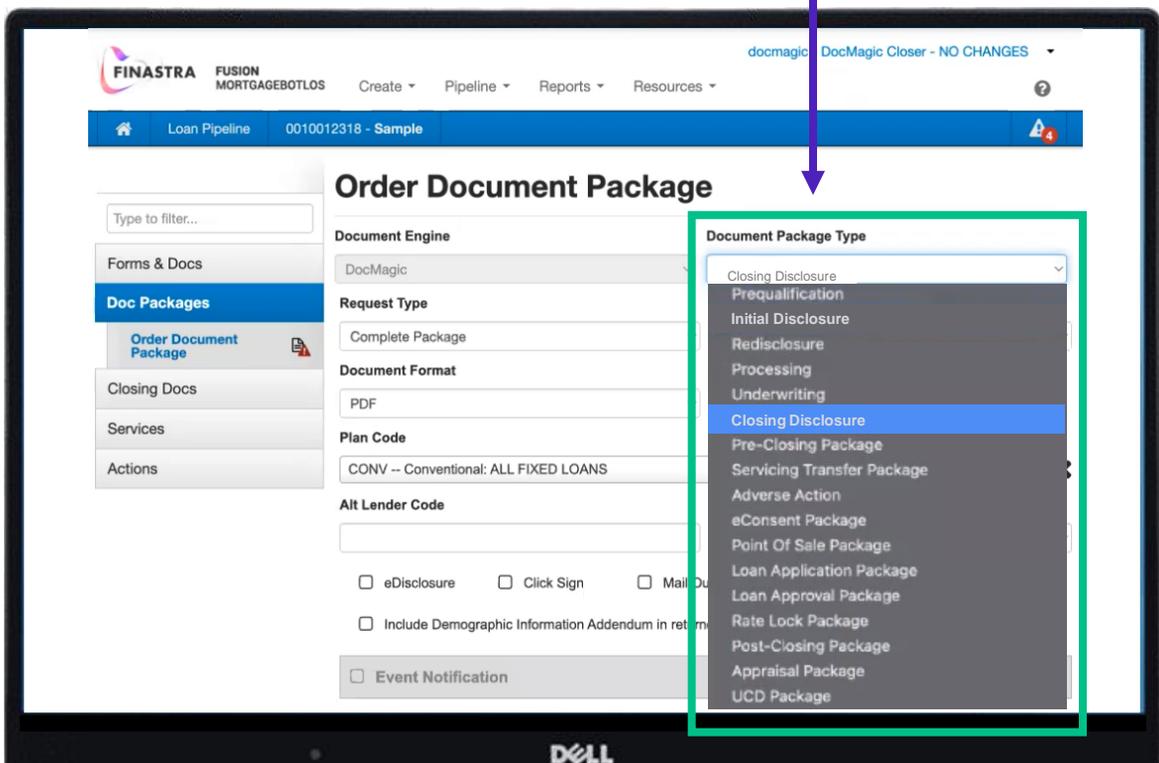
And that's how you do an Initial Disclosure! The rest of the guide focuses on running a Closing Package.



MortgageBot

Order Your Closing Disclosures

Follow the same steps for Closing Disclosures, only choose Closing Disclosure from the dropdown menu here.



The screenshot shows the 'Order Document Package' interface in the MortgageBot system. The page title is 'Order Document Package'. The 'Document Engine' is set to 'DocMagic'. The 'Request Type' is 'Complete Package'. The 'Document Format' is 'PDF'. The 'Plan Code' is 'CONV -- Conventional: ALL FIXED LOANS'. The 'Alt Lender Code' field is empty. There are checkboxes for 'eDisclosure', 'Click Sign', 'Mail Du', 'Include Demographic Information Addendum in return', and 'Event Notification'. The 'Document Package Type' dropdown menu is open, showing a list of options: 'Closing Disclosure', 'Prequalification', 'Initial Disclosure', 'Redisclosure', 'Processing', 'Underwriting', 'Closing Disclosure', 'Pre-Closing Package', 'Servicing Transfer Package', 'Adverse Action', 'eConsent Package', 'Point Of Sale Package', 'Loan Application Package', 'Loan Approval Package', 'Rate Lock Package', 'Post-Closing Package', 'Appraisal Package', and 'UCD Package'. The 'Closing Disclosure' option is highlighted in blue. A purple arrow points from the text box above to the dropdown menu.

Remember that you have the option for both Initial and Closing Disclosures.



MortgageBot

Closing Package

Once you've sent out your CD and you're ready to produce the closing package, go to Closing Docs.

The screenshot displays the FINASTRA FUSION MORTGAGEBOTLOS web application interface. The top navigation bar includes the logo, user name, and menu items like 'Create', 'Pipeline', 'Reports', and 'Resources'. The main content area is titled 'Submission' and contains several sections: 'Document Engine' (DocMagic), 'Request Type' (Complete Package), 'Language' (English), and 'Document Format' (PDF). Below these are fields for 'Plan Code' (CONV -- Conventional: ALL FIXED LOANS), 'Alt Lender Code', and 'eClosing Provider'. There are also several checkboxes for options like 'eDisclosure', 'Click Sign', 'Mail Out To Borrower', 'Include Demographic Information Addendum', 'Event Notification', 'Email To Closing Agents', and 'Upload PDF to DocBlock'. A 'Submit' button is visible at the bottom right. A purple arrow points from the 'Submission' option in the left sidebar to the 'Submit' button.

Choose Submission.



We recommend that you run an audit first.
Select Audit Only under Request Type.

The screenshot shows the 'Submission' form in the MortgageBot interface. The 'Request Type' dropdown menu is highlighted with a green box, and the 'Audit Only' option is selected. A blue arrow points from the text box above to this dropdown. At the bottom right of the form, the 'Submit' button is highlighted with a green box, and a blue arrow points from the text box below to it. The form includes fields for Document Engine (DocMagic), Language (English), Document Format (PDF), Plan Code (CONV -- Conventional: ALL FIXED LOANS), and various checkboxes for eDisclosure, Click Sign, Mail Out To Borrower, Event Notification, Email To Closing Agents, and Upload PDF to DocBlock.

Click Submit.



MortgageBot

Closing Package

Many of the steps are the same. Start by selecting Complete Package under Request Type and by choosing either PDF or DBK in the Document Format.

The screenshot displays the 'Submission' form in the FINASTRA FUSION MORTGAGEBOTLOS system. The form includes the following fields and options:

- Document Engine:** DocMagic
- Language:** English
- Plan Code:** CONV - Conventional: ALL FIXED LOANS
- Request Type:** Complete Package
- Document Format:** DocBlock
- Alt Lender Code:** (empty field)
- eClosing Provider:** (empty dropdown)
- eDisclosure
- Click Sign
- Mail Out To Borrower
- Include Demographic Information Addendum in returned loan application
- Event Notification
- Email To Closing Agents
- Upload PDF to DocBlock

Buttons for 'Cancel' and 'Submit' are located at the bottom right of the form.

Choose your plan code here.



MortgageBot

Closing Package

Select eDisclosure and Click Sign for eSignature capture.

The screenshot shows the 'Submission' page in the Finastra Fusion MortgageBotLOS system. The interface includes a navigation menu on the left with categories like 'Forms & Docs', 'Doc Packages', and 'Closing Docs'. The main content area is titled 'Submission' and contains several sections: 'Document Engine' (DocMagic), 'Language' (English), 'Plan Code' (CONV -- Conventional: ALL FIXED LOANS), 'Alt Lender Code', and 'eClosing Provider'. A green box highlights the 'Request Type' dropdown menu, which is set to 'Complete Package', and the 'Document Format' dropdown, which is set to 'DocBlock'. Below these, the 'Click Sign' checkbox is checked, indicating the selection of eSignature capture. At the bottom right, a 'Submit' button is highlighted with a green box. A purple arrow points from the instruction box above to the 'Click Sign' checkbox, and another purple arrow points from the 'Submit' button to the instruction box below.

Hit Submit.



MortgageBot

Participant Invitation

Emails will now go out to the Borrower and title agent who you added in MortgageBot.

