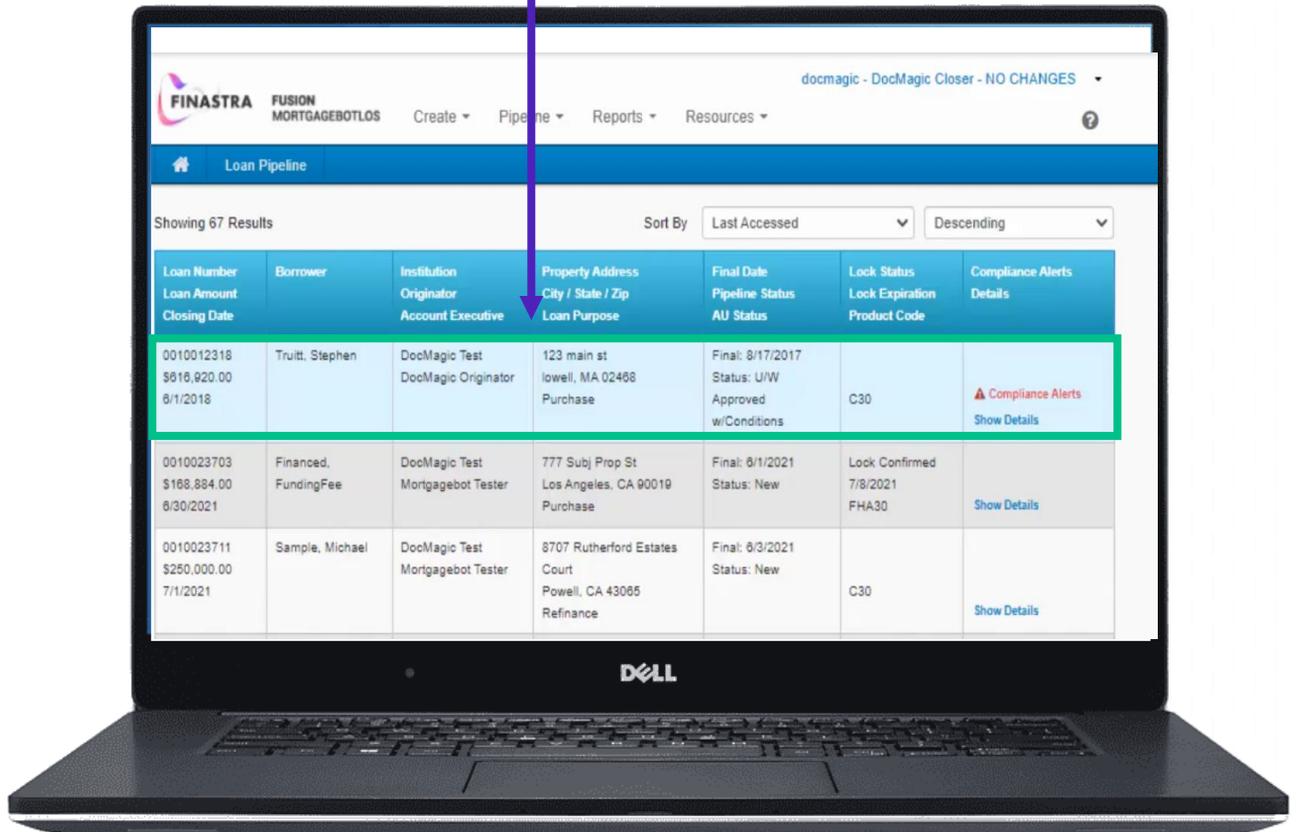# DocMagic

FINASTRA
MortgageBot

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.

Check Borrower Information

Make sure that the Borrower's information is correct.

0010000123 – Daniel Sample

Loan Details | **Hide**

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:	
		Cash To Close:	($333,004.31)
		Closing Date:	8/31/2013
Appraised Value:	$315,300.00		

Borrower Information | **Show**

Assigned To | **Show**

Ratios | **Show**

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FUSION MORTGAGEBOTLOS
Create ▾   Pipeline ▾   Reports ▾   Resources ▾

docmagic - DocMagic Closer - NO CHANGES ▾

Loan Pipeline   0010000123 - Sample

Type to filter...

Forms & Docs
- Borrower Summary
- GFE/IFW
- 1003
- HMDA Information
- Vendor Info
- TIL
- Patriot Act
- Flood Hazard
- HUD/VA 92900
- VA Loan Analysis
- VA Loan Summary
- U/W Conditions/Decision

DELL

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Order Your Document Package

From Doc Packages, choose Order Document Package.

MortgageBot

Order Your Document Package

Choose your package type from the dropdown menu here.

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

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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.

Order Document Package

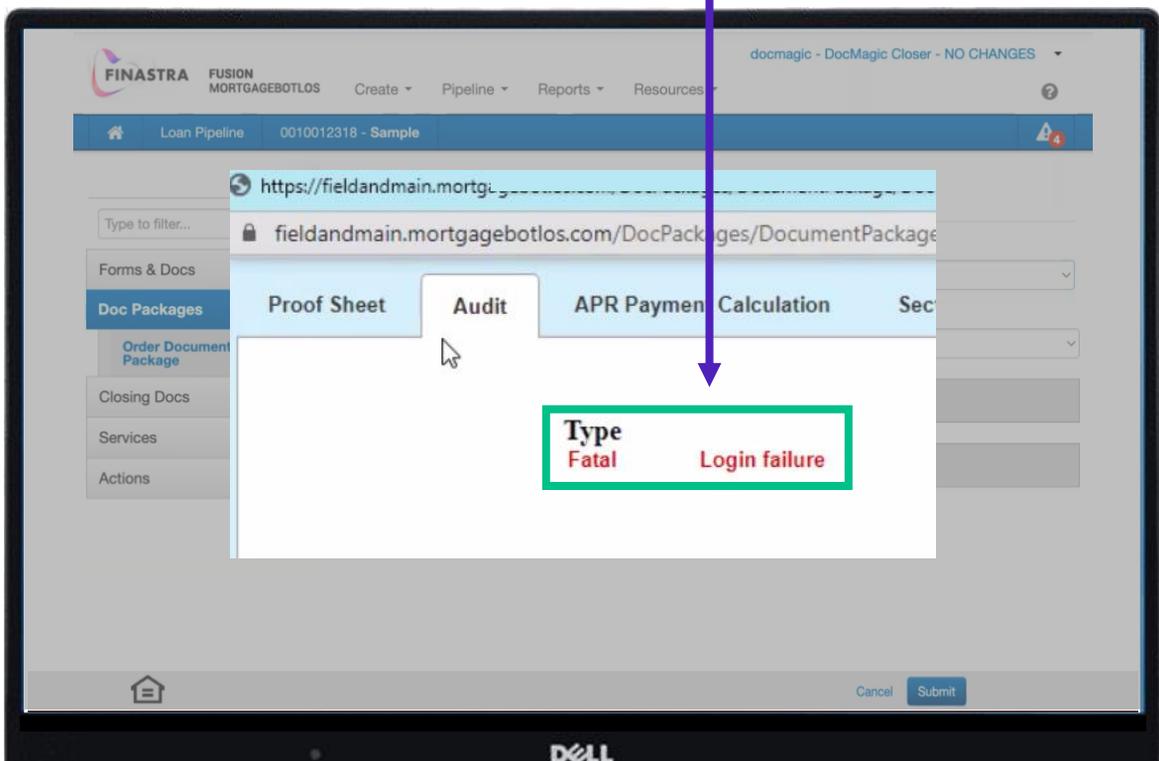|	
Document Engine	**Document Package Type**
DocMagic	Initial Disclosure
Request Type	**Language**
Audit Only	English

☐ **Event Notification**

☐ **Additional Data**

Then, click Submit.

MortgageBot

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.

MortgageBot

When You're Ready to Process

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

Choose "Complete Package" under Request Type.

MortgageBot

When You're Ready to Process

Select PDF or DBK from Document Format.

Order Document Package

Choose your Plan Code.

MortgageBot

When You're Ready to Process

Click eDisclosure and Click Sign for eSignature capture.
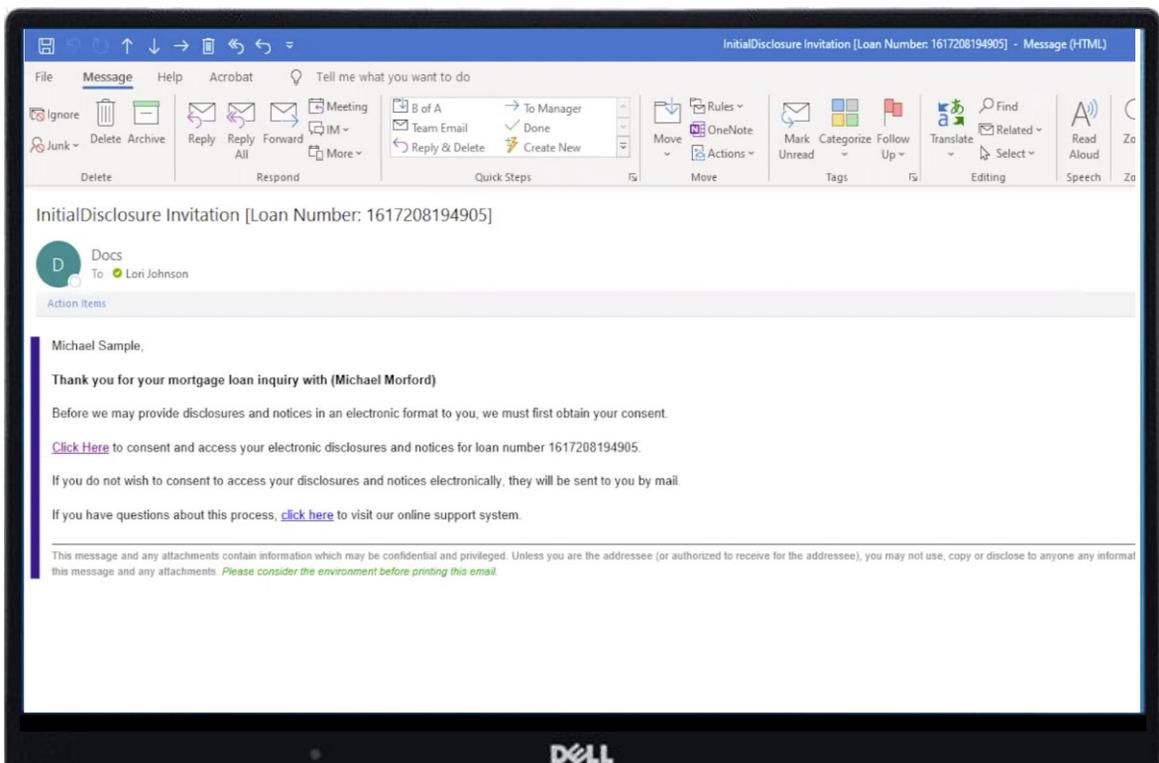

Click Submit.

MortgageBot

Participant Invitation

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

InitialDisclosure Invitation [Loan Number: 1617208194905]

Docs
To ○ Lori Johnson

Action Items

Michael Sample,

Thank you for your mortgage loan inquiry with (Michael Morford)

Before we may provide disclosures and notices in an electronic format to you, we must first obtain your consent.

Click Here to consent and access your electronic disclosures and notices for loan number 1617208194905.

If you do not wish to consent to access your disclosures and notices electronically, they will be sent to you by mail.

If you have questions about this process, click here to visit our online support system.

This message and any attachments contain information which may be confidential and privileged. Unless you are the addressee (or authorized to receive for the addressee), you may not use, copy or disclose to anyone any informat this message and any attachments. *Please consider the environment before printing this email.*

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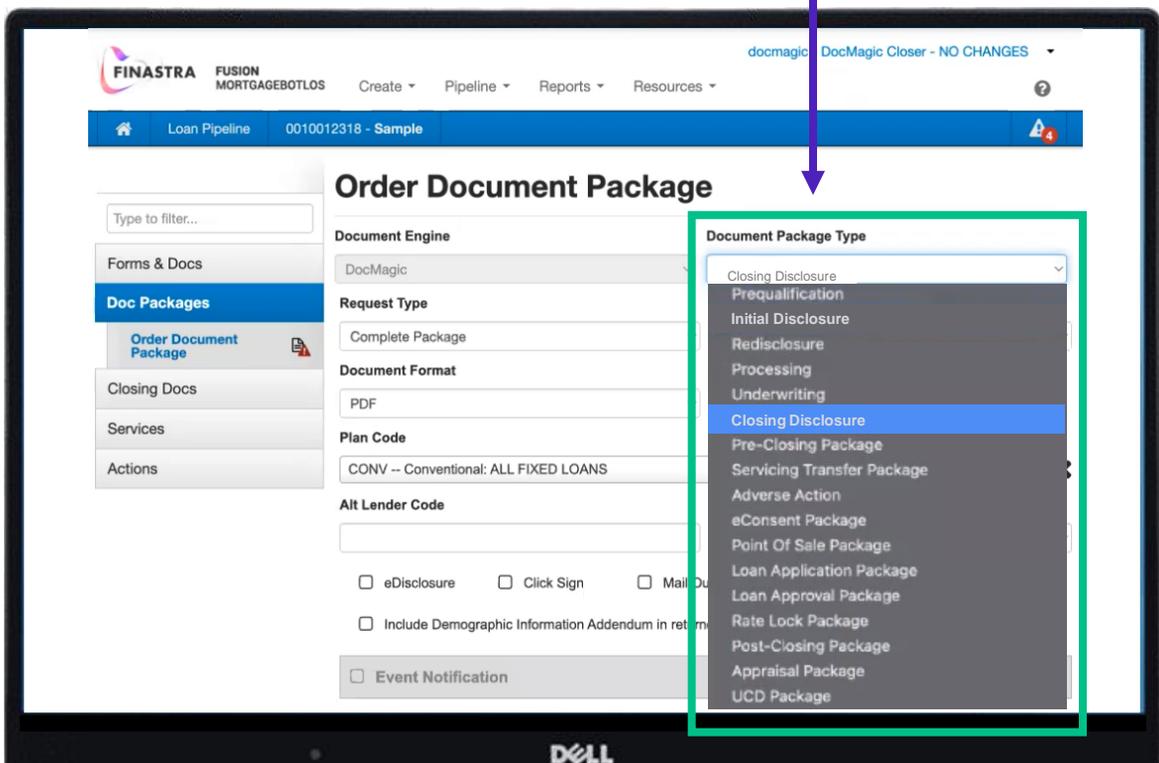

And that's how you do an Initial Disclosure! The rest of the guide focuses on running a Closing Package.

MortgageBot

Order Your Closing Disclosures

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

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

Closing Package

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

Choose Submission.

MortgageBot

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

Submission

Document Engine
DocMagic

Request Type
Audit Only

Language
English

Document Format
PDF

Plan Code
CONV -- Conventional: ALL FIXED LOANS

Alt Lender Code

eClosing Provider

☐ 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

Submit

Click Submit.

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.

Submission

Document Engine	Request Type
DocMagic	Complete Package
Language	**Document Format**
English	DocBlock

Plan Code

CONV -- Conventional: ALL FIXED LOANS

Alt Lender Code	eClosing Provider

☑ 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**

Cancel   Submit

Choose your plan code here.

MortgageBot

Select eDisclosure and Click Sign for eSignature capture.

Hit Submit.

Participant Invitation

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