DocMagic
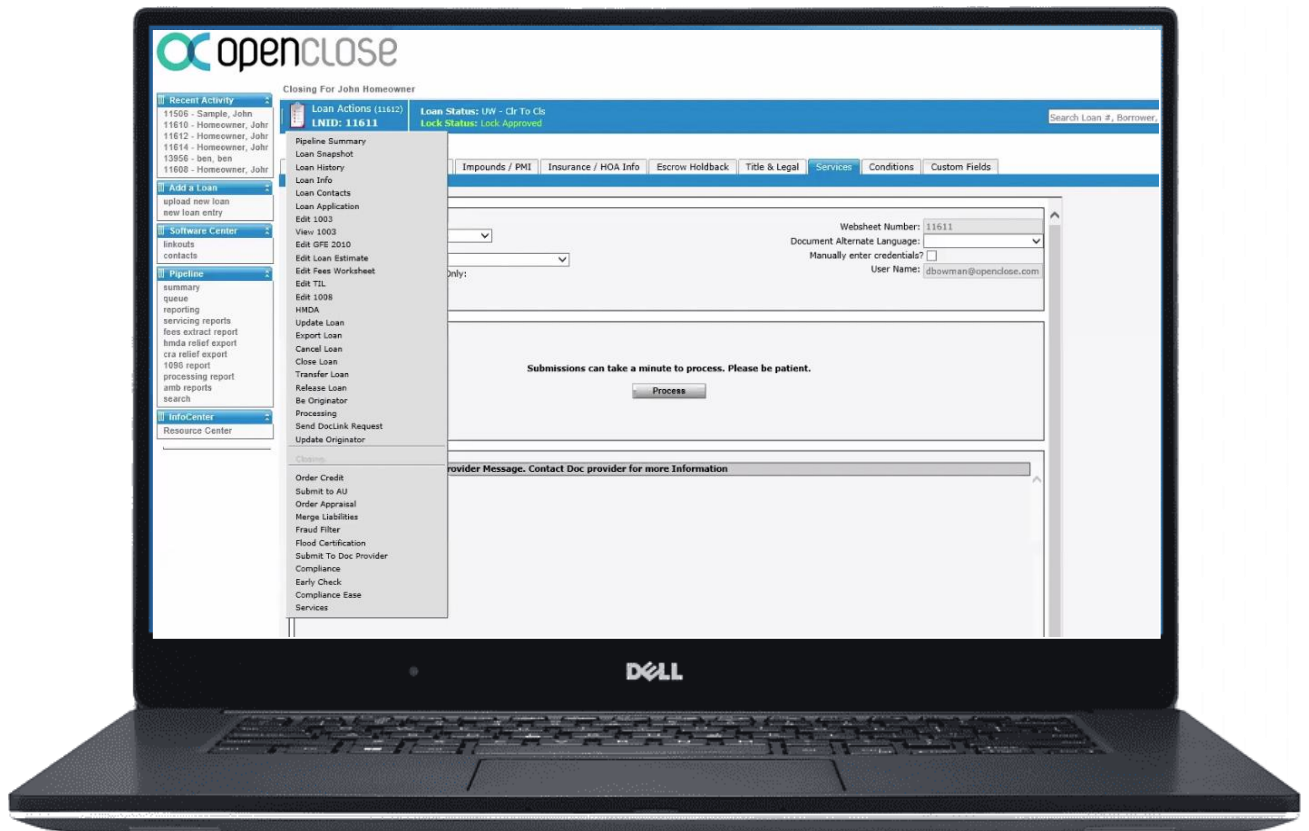
Open Close

DocMagic offers a seamless integration with OpenClose LOS.

With OpenClose, you've got the option of a Hybrid or a full seamless eClose.

OpenClose

Generate Disclosures

When the Lender is ready, they will go to Loan Actions.

Then, they will select "Submit to Doc Provider."

OpenClose

Submit Loan to Doc Provider

Select your package type from the dropdown here.
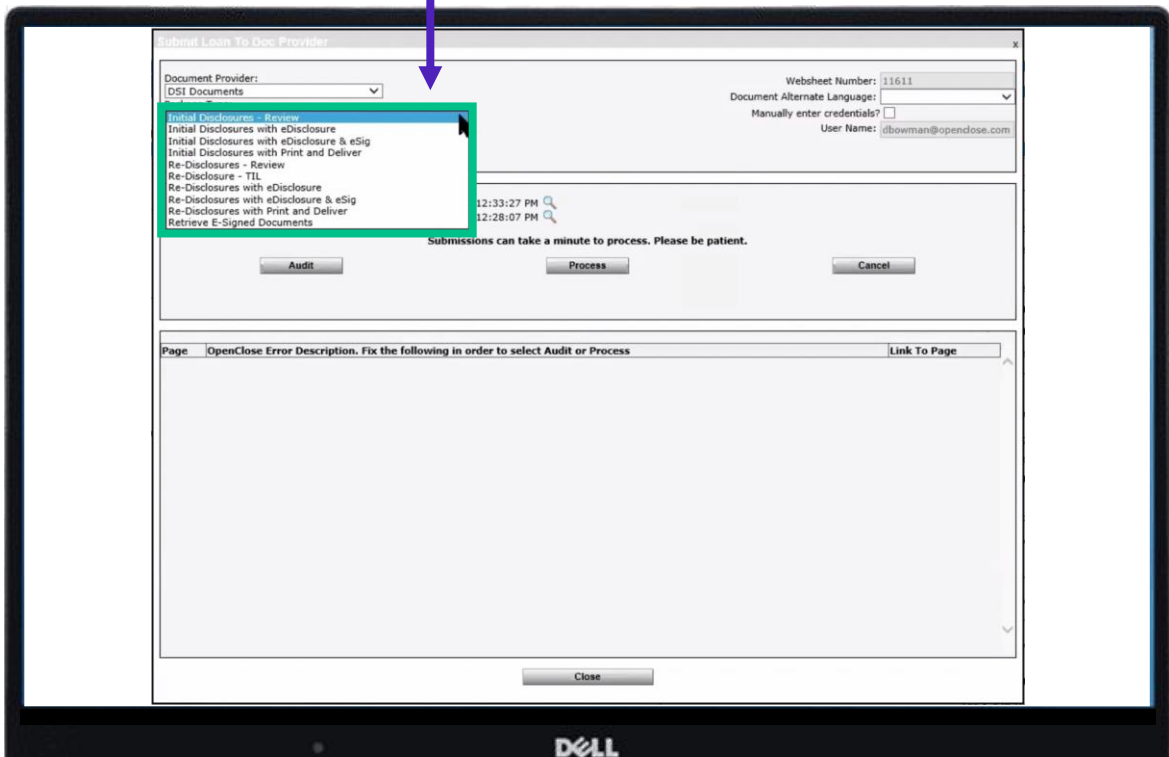

You have options to review packages
or process and deliver them.

Submit Loan to Doc Provider

There's also a Retrieve E-Signed Documents option so once your borrower signs everything, you can pull the documents back into OpenClose.

We'll explain more towards the end of the guide.

We recommend that you audit the package first. Select Initial Disclosures – Review from Package Type.

Select Audit.

Auditing

Audit results can be found here. There are two message types found in the left most column – Warnings and Fatals.

You may proceed with a Warning but *you cannot proceed with a Fatal. A Fatal is a hard stop*. A fatal error likely means that something would be out of compliance if the package was produced – so the system won't let you do it.

OpenClose

Loan Detail Report

Click on the magnifying glass next to Last Audit Result to view the Loan Detail Report.

For a comprehensive guide on our Loan Detail Report, please visit DocMagic's Product Training Page.
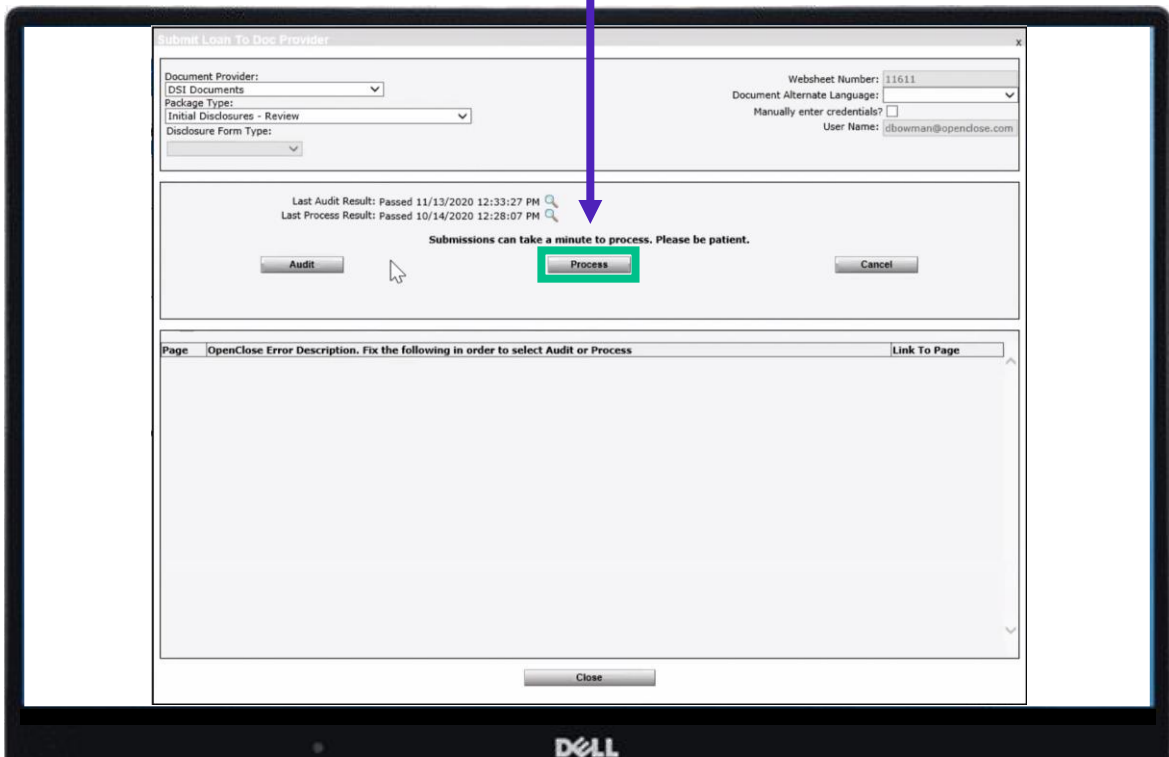
Now you can review the document package by clicking Process.

OpenClose

Process Response

If you want to review any of the compliance reports or disclosure documents, click on the magnifying glass next to Last Process Result to open the Process Response window.

Click on the magnifying glass next to Disclosure Documents (PDF).

OpenClose

Your full document package will be ready for review (including the Loan Detail Report – pictured).

Transaction Details	Data Validation	Compliance Audit		Collapse all ⌃

⌄ DETAILS

LENDER INFO

Lender Name:	DSI TEST LENDER (STEVE TRUITT)	Transfer To:		
Loan Program:	ALL FIXED LOANS - E*TRADE (TB_CONV)			

LOAN IDENTIFIERS

Loan Number:	7770809202200010	FHA/VA Case:		MERS #:	100162500042846502
Loan Purpose:	Refinance	Loan Type:	Conventional	Origination Type:	Lender
FHA Section:		MIC #:	123465		
Loan Rep:	Steve Truitt	Broker Name:		Branch:	

IMPORTANT DATES

Application Date:	02/01/2019	Cancel Date:		CD/Re-Disc Send Date:	
Document Date:	05/09/2019	Disbursement Date:	11/16/2018	CD/Re-Disc Method:	
Closing Date:	08/10/2022	Est. Avail. Through:	03/15/2019	CD/Re-Disc Recv. Date:	
Signing Date:		Pre-Z Send Date:	02/19/2016		

RATE LOCK

Rate Lock Date:	02/14/2019	Rate Avail. Through:	03/15/2019	Lock Prior to Close:	5 days
Rate Lock Days:	30 days	Time:	12:00 AM	Last Disclosed APR:	3.593%

DELL

Remember – nothing has been sent out yet.

Deja Vu

Go back and click Loan Actions (again)

Select "Submit to Doc Provider" (again)

OpenClose

Select Package Type and Process

Select "Initial Disclosures with eDisclosure & eSig" for Package Type.
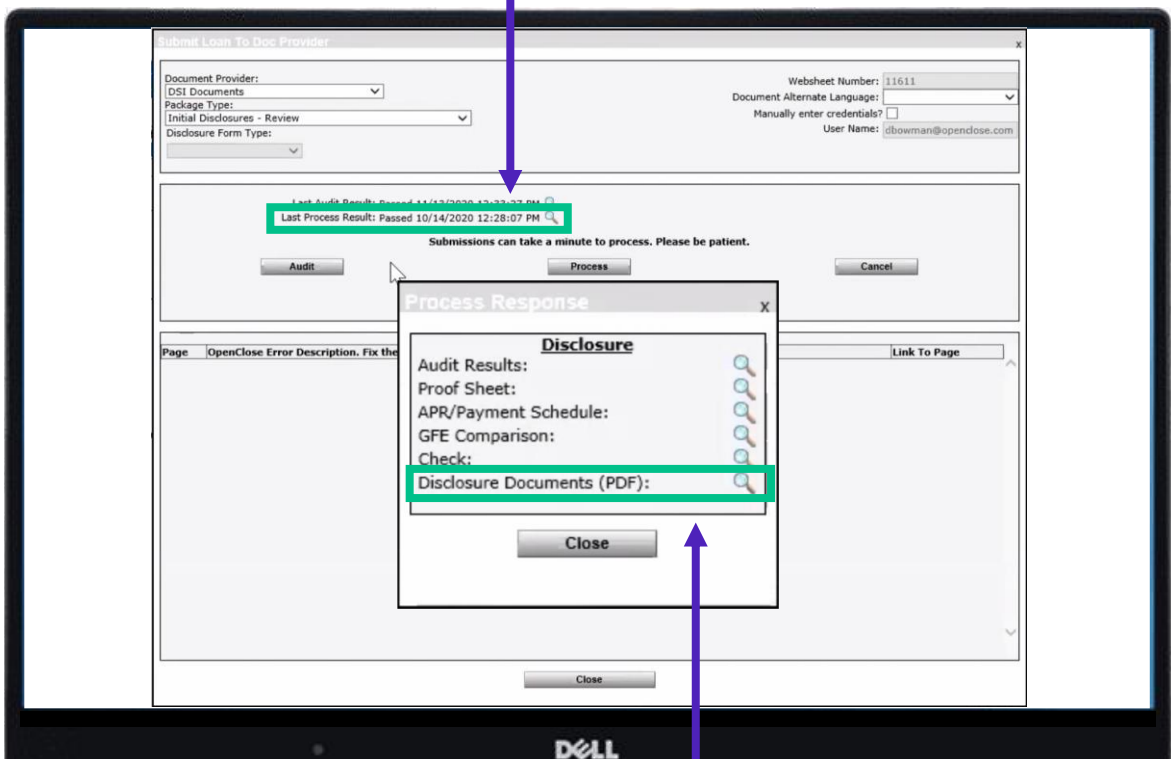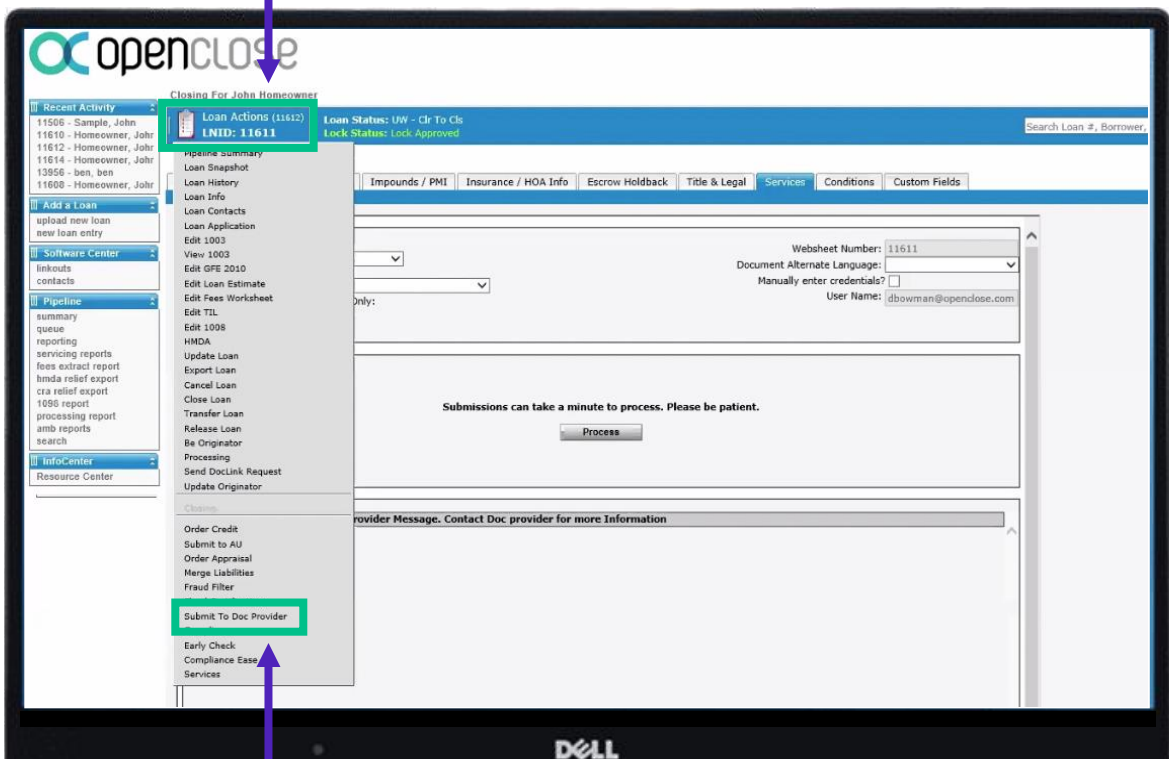
Submit Loan To Doc Provider

Document Provider:
DSI Documents

Package Type:
Initial Disclosures with eDisclosure & eSig

Disclosure Form Type:

Websheet Number: 11611
Document Alternate Language:
Manually enter credentials?
User Name: dbowman@openclose.com

Last Audit Result: Passed 11/13/2020 12:33:27 PM
Last Process Result: Passed 10/14/2020 12:28:07 PM

Submissions can take a minute to process. Please be patient.

Audit   Process   Cancel

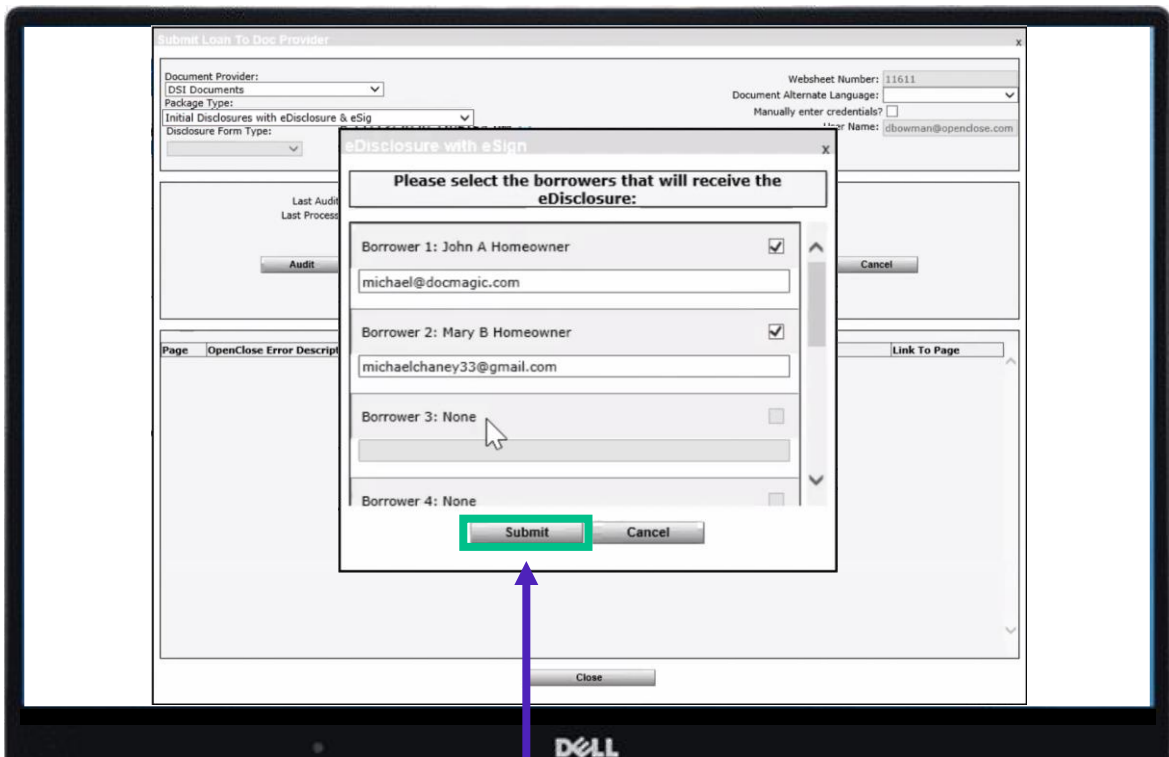| Page	OpenClose Error Description. Fix the following in order to select Audit or Process	Link To Page

Close

Hit Process.

The window that appears will show the emails of the borrowers that the package is going to.
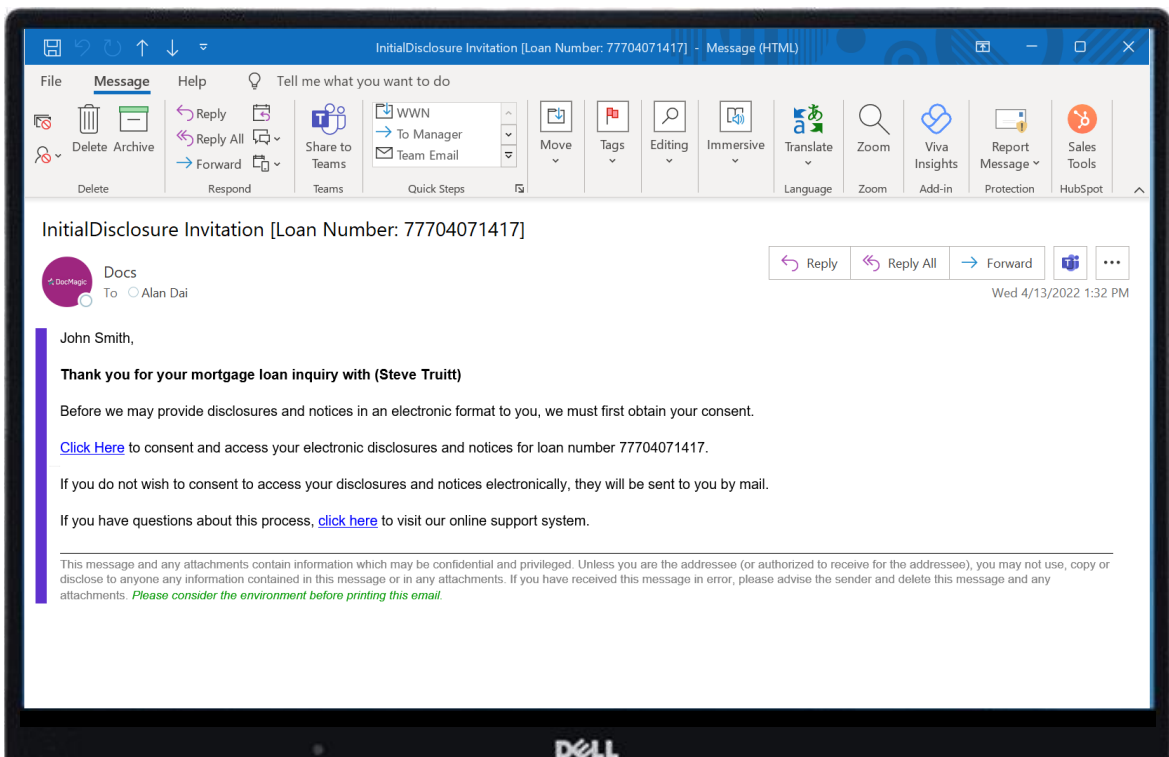

Hit Submit.

OpenClose

The entire package will be delivered to the borrower via email (shown below).

The borrower will click the link in the email and sign everything.

OpenClose

Retrieve E-Signed Documents

After the borrower completes their signatures, go back into OpenClose. This time, select Retrieve E-Signed Documents for Package Type.

Submit Loan To Doc Provider

Document Provider:
DSI Documents

Package Type:
Retrieve E-Signed Documents

Websheet Number: 10057
Document Alternate Language:
User Name: oc_dmadmin@computersh

Last Audit Result: Passed 12/2/2020 4:21:50 PM
Last Process Result: Passed 12/2/2020 4:21:50 PM

Submissions can take a minute to process. Please be patient.

Audit   Process   Cancel

Page	OpenClose Error Description. Fix the following in order to select Audit or Process	Link To Page

Hit Process.

You'll get this screen that gives you a list of signed packages.

Click on a floppy disk to save that package.

Retrieve E-Signed Documents

This message confirms that your package was saved successfully.

OpenClose

Services

Now, go to Services.

For Package Type, you have the option of choosing any of these selections that will allow you to generate closing documents, UCD items, etc.

DocMagic Online

If you select Closing Docs – Review for Package Type, DocMagic Online will open when you hit Process.

For more information on DocMagic Online, please visit our Product Training Page.

All the data you've entered will port over and you can click through the tabs, review the information, and then audit the file.
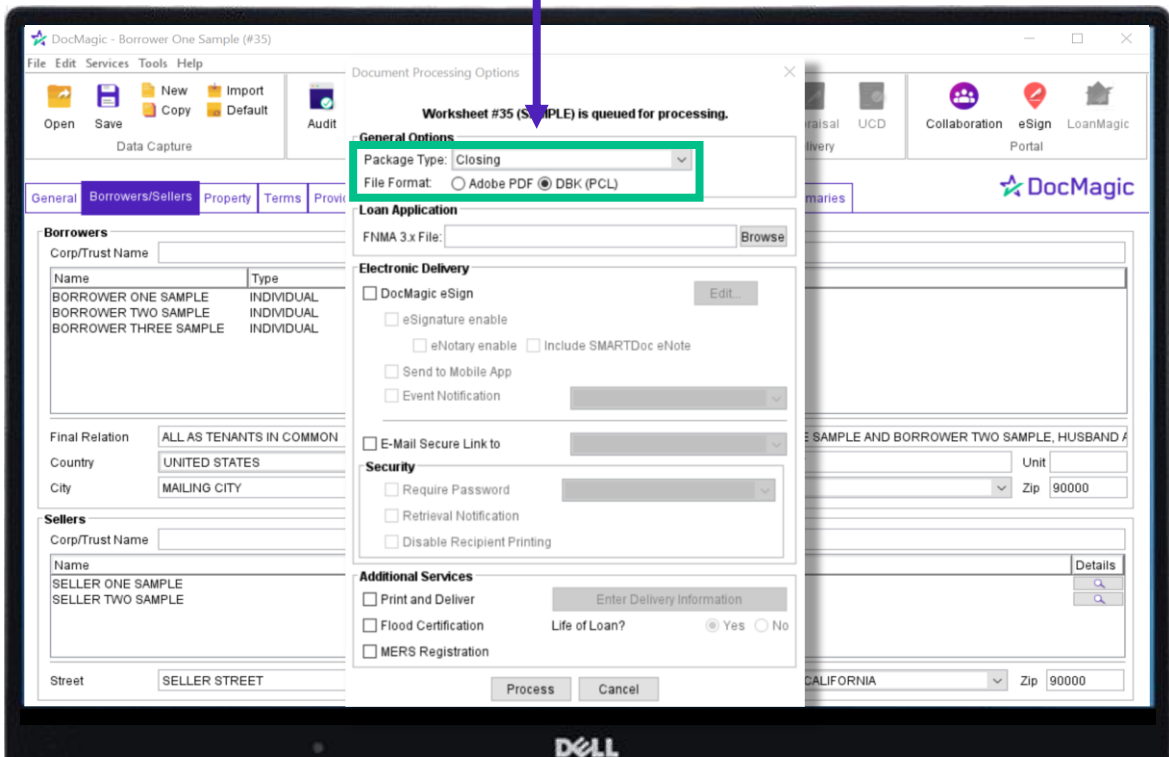

For more information on DocMagic Online, please visit our Product Training Page.

OpenClose

DocMagic Online

Once you hit Process, you can choose to export the package as a PDF or a DBK.

For more information on DocMagic Online, please visit our Product Training Page.