

GET CONNECTED

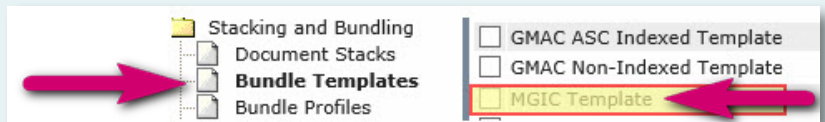
MGIC

Send Documents to MGIC through MortgagebotLOS™ ImageFlow –for Administrators

This guide shows MortgagebotLOS ImageFlow Administrators how to create a bundle profile to send loan packages directly to MGIC.

1. Access MGIC Bundle Template

The MGIC Bundle Template appears in your list of pre-installed bundle templates.



2. Configure Delivery Settings

In the **Bundle Template Editor** section, under the **Delivery Settings** tab, open the bundle template. Configure the settings as shown. Contact MGIC's Integration Services* for the production **Hostname**, **Username** and **Password** if needed.

Click **Save**.

A screenshot of the 'Bundle Template Editor' interface. The 'Name' field is 'MGIC - Test', 'Active' is 'yes', and 'Sequence' is '100'. The 'Created' date is '11/20/2014 1:31 PM'. There are tabs for 'Document Packaging', 'Bundle Packaging', 'Custom Properties', 'Delivery Settings', and 'Permissions'. The 'Delivery Settings' tab is selected and highlighted with a pink box. A pink arrow points to the 'Save' button in the top right corner. Below the tabs, there is a section for 'Delivery Method' with the following fields: Type (sftp), Hostname (b2b.mgic.com), Port (22), Upload Directory (/inbound), Username ((Your MGIC-issued User Name)), Password ((Your MGIC-issued Password)), SFTP Version (3), Authentication Type (password), Transfer Block Size, Private Key Data, Private Key Password, and Sender Module (default (recommended)).

3. Configure Custom Properties

The **Custom Properties** tab has various custom fields you'll need to configure. Assign default values to the fields that remain the same from loan to loan.

Click **Save**.

Schema ID	Name	Required	Override	Data Type	Validation	Default Value
masterPolicyNbr	Master Policy Number	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	string		531651
lenderName	Lender Name	<input checked="" type="checkbox"/>	<input type="checkbox"/>	string		ABC Company
branchCityandState	Branch City and State	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	string		San Diego CA
contactEmail	Contact Email	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	string		testuser@testcompany
contactPhone	Contact Phone	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	string		1-858-555-1212
contactFullName	Contact Full Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	string		Test User
contactFax	Contact fax	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	string		1-858-555-1213
requestType	Request Type	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	string	MGIC_RequestTy	MI Order
returnDocsVia	Return Docs Via	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	string	MGIC_ReturnDoc	
miCertificateId	MI Certificate Id (if known)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	string		
coveragePercent	Coverage Percent	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	string		
premiumPlan	Premium Plan	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	string	MGIC_PremiumPl	
premiumPaidBy	Premium Paid By	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	string	MGIC_PremiumP	
renewalType	Renewal Type	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	string	MGIC_RenewalTy	
refundOption	Refund Option	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	string	MGIC_RefundOpt	
financedAmttoMI	Financed Amt. of MI (if applicable)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	string		
employeeRelocationLoan	Employee Relocation Loan	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	string	MGIC_EmployeeR	
fileHandlingNotes	File Handling Notes (be brief)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	string		

4. Create Document Stack

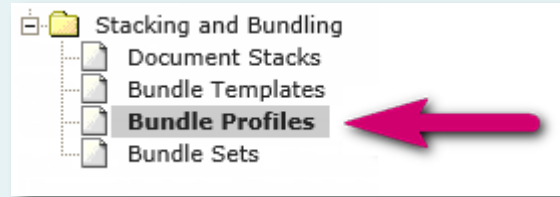
In the **Document Stack Editor** section, select the documents to add to the list and indicate the category and whether it's required or not.

Click **Save**.

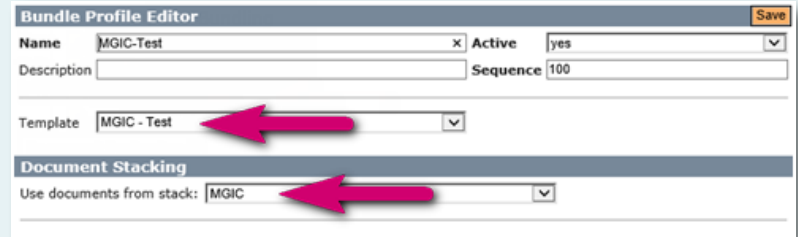
Document_Schema	Name	Code	Ref_Value	Required	Category
1003	(Loan Application)			<input type="checkbox"/>	0
1008	(Transmittal Summary)			<input type="checkbox"/>	1
	Credit Report			<input type="checkbox"/>	2
1098	Tax Form			<input type="checkbox"/>	3
4506				<input type="checkbox"/>	4
	Appraisal			<input type="checkbox"/>	5
	Bank Statement			<input type="checkbox"/>	6
	Flood Certification			<input type="checkbox"/>	7

5. Create Bundle Profile

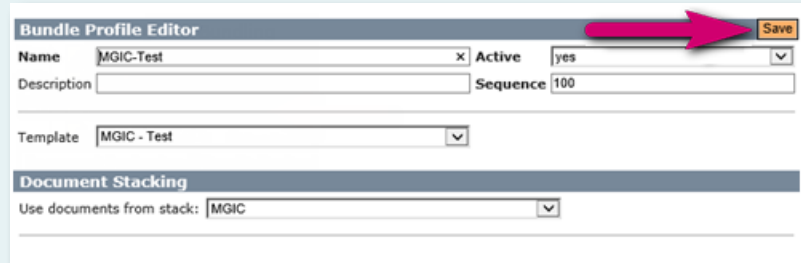
a. Under **Stacking and Bundling**, go to the **Bundle Profiles** section and click **Create**.



b. Under the **Bundle Profile Editor**, choose the **MGIC Bundle Template** and the **MGIC Document Stack**.

A screenshot of the "Bundle Profile Editor" form. The "Name" field contains "MGIC-Test", "Active" is set to "yes", and "Sequence" is "100". The "Template" dropdown menu is set to "MGIC - Test", and the "Use documents from stack:" dropdown menu is set to "MGIC". Pink arrows point to both dropdown menus.

c. Click **Save**.

A screenshot of the "Bundle Profile Editor" form, identical to the previous one, but with a pink arrow pointing to the "Save" button in the top right corner.

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