

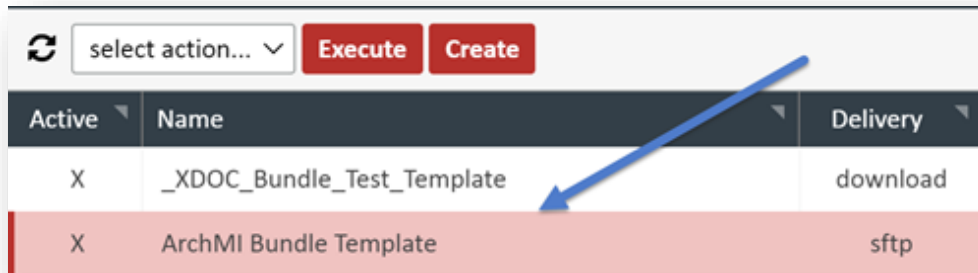
# Arch MI Loan Delivery Setup Guide for XDOC

This is a setup and user guide for users of the Axacore™ XDOC document management system, including re-branded systems Finastra™ Mortgagebot ImageFlow and MortgageBuilder® Blueprint.

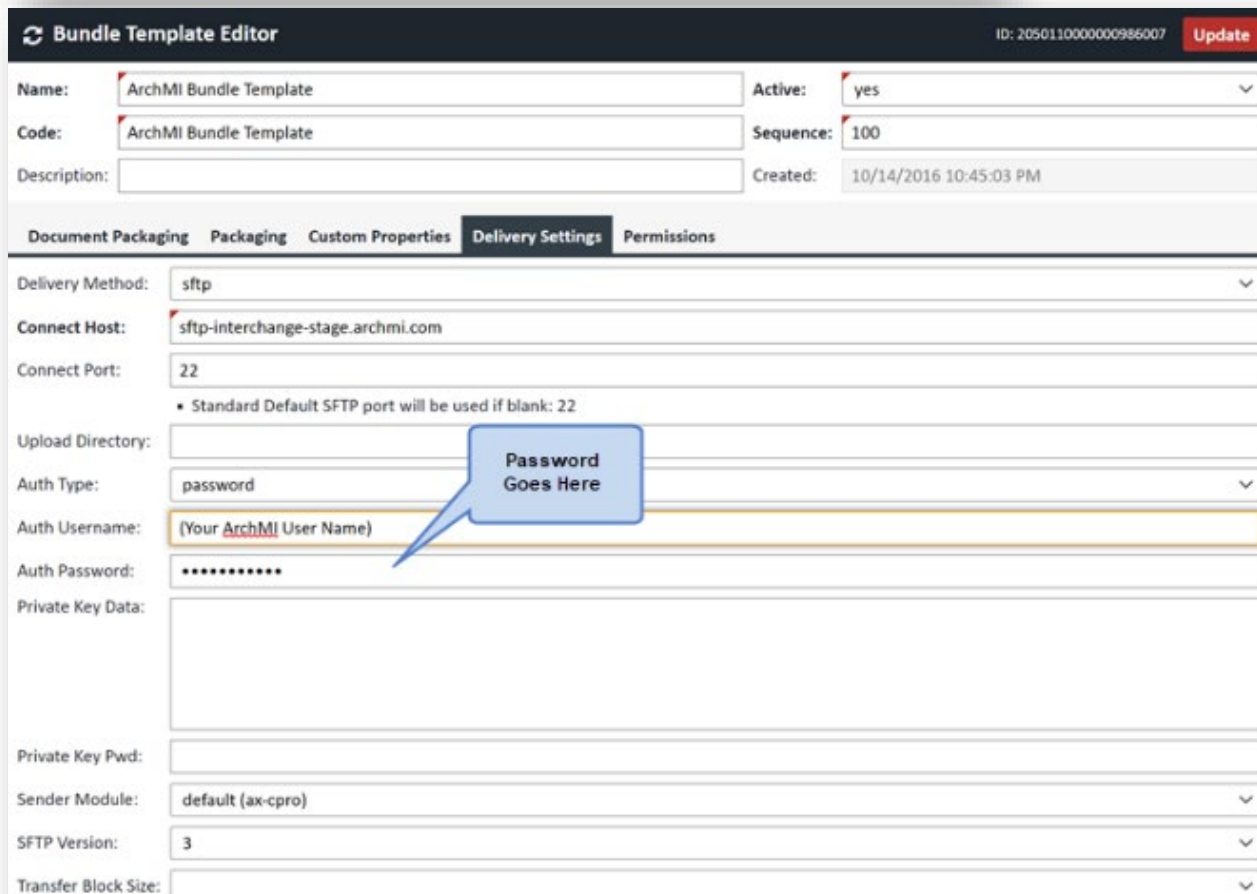
## 1) Configuring the Delivery Settings in the Bundle Template

- Go to the XDOC Admin>Projects Tab.
- On the menu on the left, go to Project Repository>Stacking and Bundling>Bundle Templates and double-click the **Arch MI Bundle Template**. This will open the Template Editor.
- Click on the Delivery Settings tab.
- Request XDOC SFTP credentials from Arch MI by calling 877-642-4642 or emailing [losdpm@archmi.com](mailto:losdpm@archmi.com).
- Configure the settings as shown in the screen shot.

**NOTES:** The host name listed is for the Arch MI test site, not the production site. Remember to change the host site to Arch MI's production site address and SFTP credentials.



Active	Name	Delivery
X	_XDOC_Bundle_Test_Template	download
X	ArchMI Bundle Template	sftp



**Bundle Template Editor** ID: 205011000000986007 Update

Name: ArchMI Bundle Template Active: yes

Code: ArchMI Bundle Template Sequence: 100

Description: Created: 10/14/2016 10:45:03 PM

Document Packaging Packaging Custom Properties **Delivery Settings** Permissions

Delivery Method: sftp

Connect Host: sftp-interchange-stage.archmi.com

Connect Port: 22  
• Standard Default SFTP port will be used if blank: 22

Upload Directory:

Auth Type: password

Auth Username: (Your ArchMI User Name)

Auth Password: \*\*\*\*\*

Private Key Data:

Private Key Pwd:

Sender Module: default (ax-cpro)

SFTP Version: 3

Transfer Block Size:

**Password Goes Here**

## 2) Configuring the Custom Properties Tab in the Bundle Template

- A. The Custom Properties tab has several custom fields required for Arch MI that will need to be configured at the time of delivery.
- B. In the Default Value field, fill out the Default Values for the following fields:
  1. Master Policy Number.
  2. Company Name.
  3. Contact Person.
  4. Contact Email.
  5. Contact Phone.

**NOTE:** The number of custom fields in your template may vary slightly from what is in the screen shot.

Document Packaging   Packaging   **Custom Properties**   Delivery Settings   Permissions

▪ Definition of custom properties that are captured during the creation of a bundle profile.

**Template Custom Properties**

Property Section Label:  add property

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Schema Code	Name	Required	Override	Data Type	Validate As	Default Value
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	masterPolicyNumber	Master Policy Nun	<input checked="" type="checkbox"/>	<input type="checkbox"/>	string		(Your Policy #)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	certificateNumber	MI Certificate Nur	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	string		
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	submissionType	Submission Type	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	string	ARCH_Submissio	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	insuranceType	Insurance Type	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	string	ARCH_Insurance1	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	coveragePercent	MI Coverage Perci	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	string		
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	paymentPlan	Payment Plan	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	string	ARCH_PaymentPl	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	refundType	Refund Type	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	string	ARCH_RefundTyp	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	renewalType	Renewal Type	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	string	ARCH_RenewalTy	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	premiumFinanced	Premium Financer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	string	ARCH_PremiumF	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	companyName	Company Name	<input checked="" type="checkbox"/>	<input type="checkbox"/>	string		(Company Name)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	contactPerson	Contact Person	<input checked="" type="checkbox"/>	<input type="checkbox"/>	string		(Contact Person)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	contactEmail	Contact Email	<input checked="" type="checkbox"/>	<input type="checkbox"/>	string		(Contact Email)
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	contactPhone	Contact Phone	<input checked="" type="checkbox"/>	<input type="checkbox"/>	string		(Contact Phone)

### 3) Configuring Template Overrides

- A. Go to the Permissions tab in the bundle template and ensure that you have at least the indicated overrides checked.
- B. You can check more boxes if needed, but you should at least have these checked.
- C. Click **UPDATE** to save your changes for the template.

**Bundled documents allowable actions**

Allow download of bundled documents

**Allow profiles based on this template to override the following**

Document Stacking List  
 Document Naming List  
 Custom Properties  
 Document Passwords (pdf, zip)  
 Document Annotations (pdf)  
 Delivery Address Properties  
  
 Delivery Method

**Allow users to overwrite the following when sending the bundle**

Document Stacking List  
 Custom Properties  
 Document Passwords (pdf, zip)  
 Document Annotations (pdf)

#### 4) Creating a Document Stack and Naming Stack for Arch MI Delivery

Arch MI Underwriting Doc Type List
1040
1008-1077 Transmittal Summary
Application 1003
Appraisal-Reports
AVM
Assets
AU Findings and Analysis
Credit Other
Credit Report
Divorce Decree
Disclosures
Explanation Letter
Gift Letter
Identification
Income
Insurance
Legal
MI Application
Misc Loan Docs
Purchase Contract
Title Reports-Closing Docs
Underwriter Notes-Worksheets
UW Guidelines

- Arch MI has a required list of documents for a non-delegated MI order. You can define this list in XDOC by configuring a document stack.
- Refer to the Arch MI Underwriting Doc Type List.
- Navigate to Document Stacking Order by clicking on “Document Stacks” and “Create” from the XDOC Admin page.

**NOTE:** You may also refer to the Document Stack Training Video provided by XDOC:

<https://docs.xdocm.com/6112/user/training-videos>.

- In the “Name” column, enter the Arch MI equivalent name for the document. This will name the documents according to the Arch MI specification upon sending the bundle.

**NOTE:** Make sure to click the “Bundle Naming” and “Bundle Documents” checkboxes when creating this stack.

Name:  Active:

Code:  Sequence:

Description:  Sort Rule:

Use In:  Bundle Naming  Bundle Documents  Printing  Profiles  Viewer  Copy

**Document Stacking Order**

Document Types:

- 
- 
- 
- 
- 

		Document Type	Name	Code	Ref Value	Req
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Appraisal	Appraisal-Reports			<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	1003 - Initial	Application 1003			<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	1008	1008-1077 Transmittal Summa			<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Credit Report	Credit Report			<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	AUS Findings	AU Findings and Analysis			<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Paystubs	Income			<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Bank Statements	Assets			<input type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Title Commitment	Title Reports-Closing Docs			<input type="checkbox"/>

## 5) Creating a Bundle Profile for Arch MI Delivery

- Go to the Bundle Profiles section and click **CREATE**.
- Choose the **Arch MI Bundle Template**.
- Choose the **Arch MI** Document Stack in “Use document names from:”.
- Choose the **Arch MI** Document Stack in “Use documents from stack:”.
- Click **SAVE**.

Bundle Profile Editor
Save

Name:

Code:

Description:

Template:

Active:

Sequence:

Page Errors:

**Documents**
Custom Properties
Delivery Settings

Use document names from:

Use documents from stack:

You can also click on the Custom Properties Tab and fill out any additional fields and they will default to this value when sending the bundle.

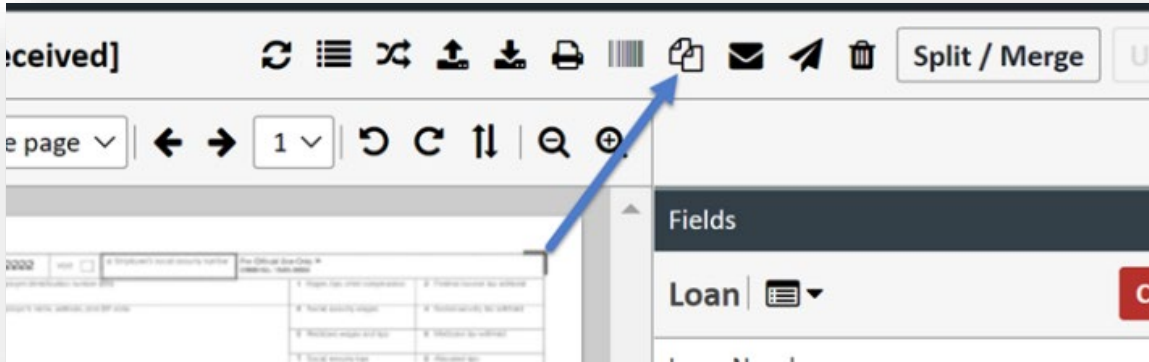
**NOTE:** Submission Type should be “Standard”.

**Override Properties**

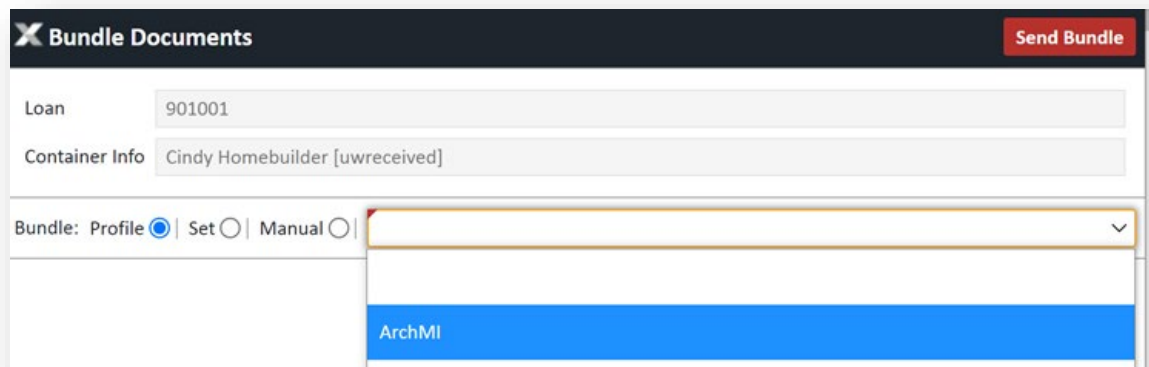
MI Certificate Number	<input type="text"/>
Submission Type	<input type="text" value="Standard"/>
Insurance Type	<input type="text"/>
MI Coverage Percent	<input type="text"/>
Payment Plan	<input type="text"/>
Refund Type	<input type="text"/>
Renewal Type	<input type="text"/>
Premium Financed	<input type="text"/>
Company Name	<input type="text" value="(Company Name)"/>
Contact Person	<input type="text" value="(Contact Person)"/>
Contact Email	<input type="text" value="(Contact Email)"/>
Contact Phone	<input type="text" value="(Contact Phone)"/>

## 6) Sending a Bundle

- A. After the Administrative configuration is done and you're ready to send files to Arch MI:
- B. Navigate to the loan in XDOC.
- C. Click the **Bundle** button.



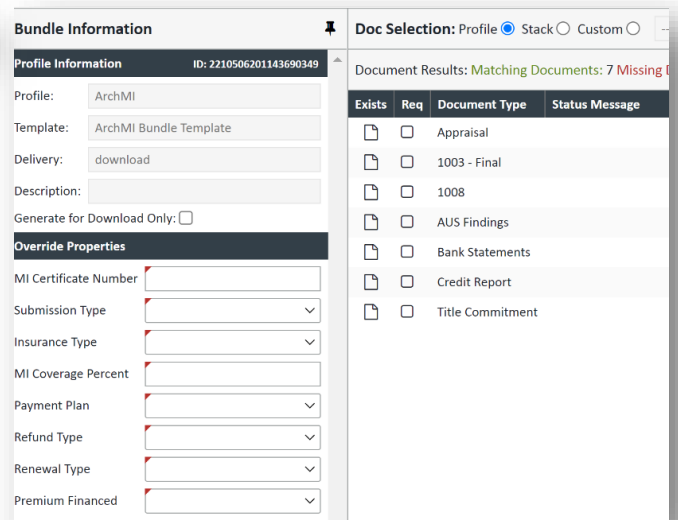
- D. From the drop-down box, choose the **Arch MI Bundle**.



- E. When the bundle screen appears, complete the fields on the left using the below chart as a guide:

Field	Values and Notes
MI Certificate Number	Enter the number given to you by ArchMI
Submission Type	Delegated or Standard
Insurance Type	Borrower Paid or Lender Paid
MI Coverage Percent	Just the number. Do not enter the "%" sign
Payment Plan	Deferred Monthly, Monthly Premium, Single Premium, or Level Annual
Refund Type	No Refund or Refund
Renewal Type	Original/Constant or Standard/Amortizing
Premium Financed	No or Yes

**Note:** Submission Type should be "Standard".



7) Click "Send Bundle".

**Bundle Documents** Send Bundle

Loan: 901001

Container Info: Cindy Homebuilder [unreceived]

8) The bundle will be sent. When complete, you will receive a completion verification.

**PROCESS EXECUTION: END** 1:15:51 .588

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**Overall Success:** 👍 True

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Total Profiles: 1

Profiles Processed: 1

**Profiles Completed: 1**

Profiles Failed: 0

Processing Start Time: 5/6/2021 1:15:50 PM

Processing End Time: 5/6/2021 1:15:51 PM

Total Time (Sec): 1.5090475