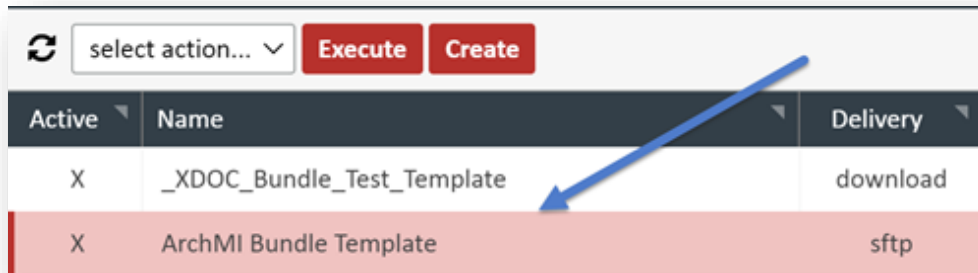# Arch MI Loan Delivery Setup Guide for XDOC

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.
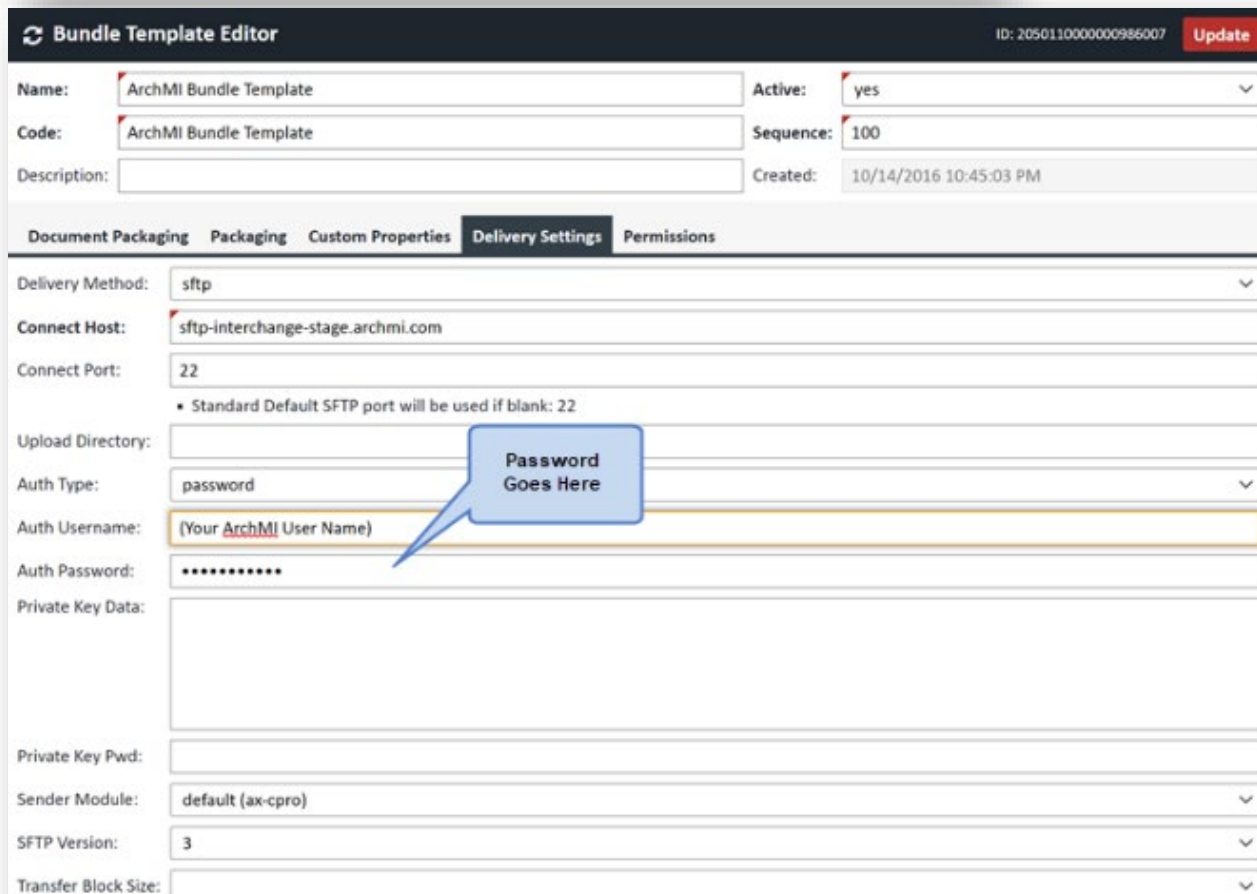
1) Configuring the Delivery Settings in the Bundle Template

A. Go to the XDOC Admin>Projects Tab.
B. 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.
C. Click on the Delivery Settings tab.
D. Request XDOC SFTP credentials from Arch MI by calling 877-642-4642 or emailing losdpm@archmi.com.
E. 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.

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: | Account Info | **add property** |

☐	✖	▲	▼	Schema Code	Name	Required	Override	Data Type	Validate As	Default Value
☐	✖	▲	▼	masterPolicyNumber	Master Policy Nun	☑	☐	string		(Your Policy #)
☐	✖	▲	▼	certificateNumber	MI Certificate Nun	☑	☑	string		
☐	✖	▲	▼	submissionType	Submission Type	☑	☑	string	ARCH_Submissio	
☐	✖	▲	▼	insuranceType	Insurance Type	☑	☑	string	ARCH_Insurance	
☐	✖	▲	▼	coveragePercent	MI Coverage Perc	☑	☑	string		
☐	✖	▲	▼	paymentPlan	Payment Plan	☑	☑	string	ARCH_PaymentP	
☐	✖	▲	▼	refundType	Refund Type	☑	☑	string	ARCH_RefundTyp	
☐	✖	▲	▼	renewalType	Renewal Type	☑	☑	string	ARCH_RenewalTy	
☐	✖	▲	▼	premiumFinanced	Premium Finance	☑	☑	string	ARCH_PremiumF	
☐	✖	▲	▼	companyName	Company Name	☑	☐	string		(Company Name)
☐	✖	▲	▼	contactPerson	Contact Person	☑	☐	string		(Contact Person)
☐	✖	▲	▼	contactEmail	Contact Email	☑	☐	string		(Contact Email)
☐	✖	▲	▼	contactPhone	Contact Phone	☑	☐	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

A. 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.
B. Refer to the Arch MI Underwriting Doc Type List.
C. 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.

D. 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.

5) Creating a Bundle Profile for Arch MI Delivery

    A.   Go to the Bundle Profiles section and click **CREATE**.

    B.   Choose the **Arch MI Bundle Template**.

    C.   Choose the **Arch MI** Document Stack in "Use document names from:".

    D.   Choose the **Arch MI** Document Stack in "Use documents from stack:".

    E.   Click **SAVE**.

Bundle Profile Editor		Save
Name: ArchMI	**Active:** yes	
Code: ArchMI	**Sequence:** 100	
Description:		
Template: ArchMI Bundle Template	**Page Errors:** abort on doc page load error	

Documents Custom Properties Delivery Settings

Use document names from: ArchMI

Use documents from stack: ArchMI

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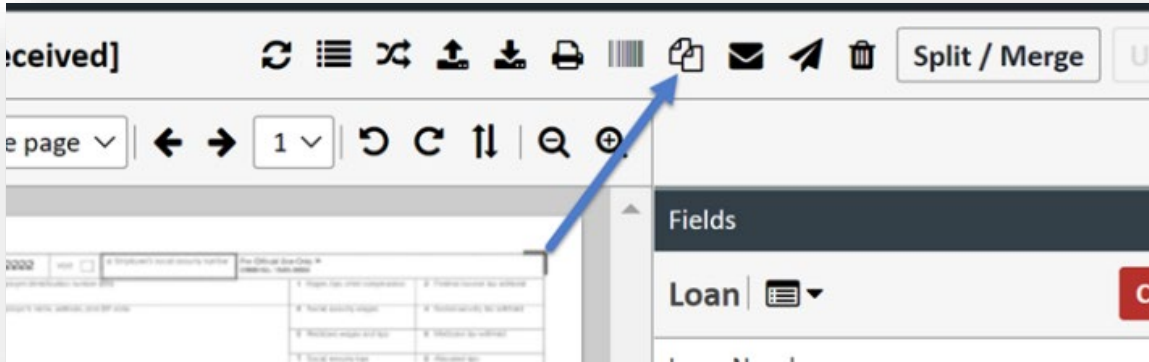
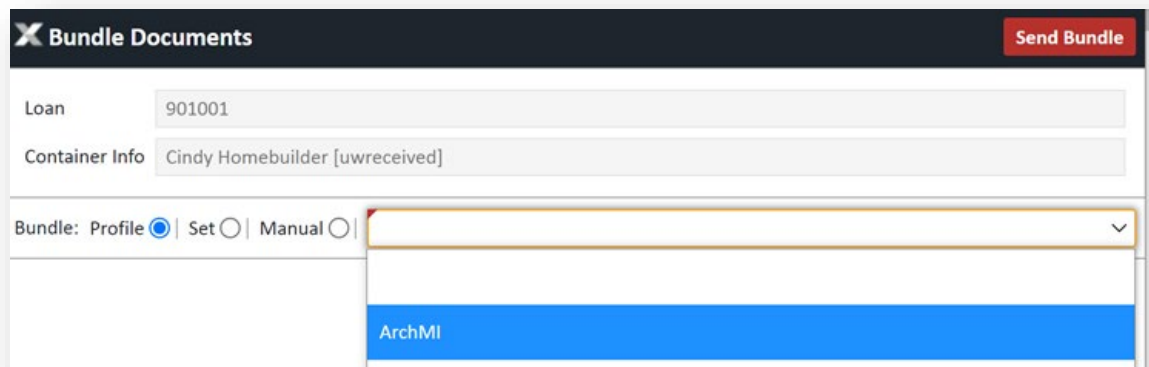**NOTE:** Submission Type should be "Standard".

Override Properties	
MI Certificate Number	
Submission Type	
Insurance Type	
MI Coverage Percent	
Payment Plan	
Refund Type	
Renewal Type	
Premium Financed	
Company Name	(Company Name)
Contact Person	(Contact Person)
Contact Email	(Contact Email)
Contact Phone	(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.
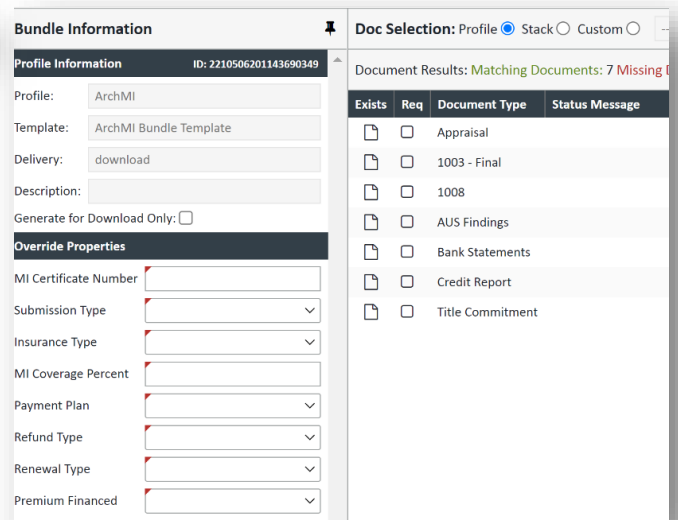
    C. Click the **Bundle** button.

    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".

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