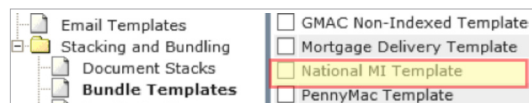# National MI Loan Delivery Set-Up Guide for XDOC

This guide details the specific instructions for XDOC Administrators to properly create a bundle profile to send loans directly to National MI for the issuance of mortgage insurance. In order to send loan document packages to National MI, you must first contact National MI at ecommercesupport@nationalmi.com to obtain the proper credentials for the National MI SFTP site, and you must already be a National MI customer.

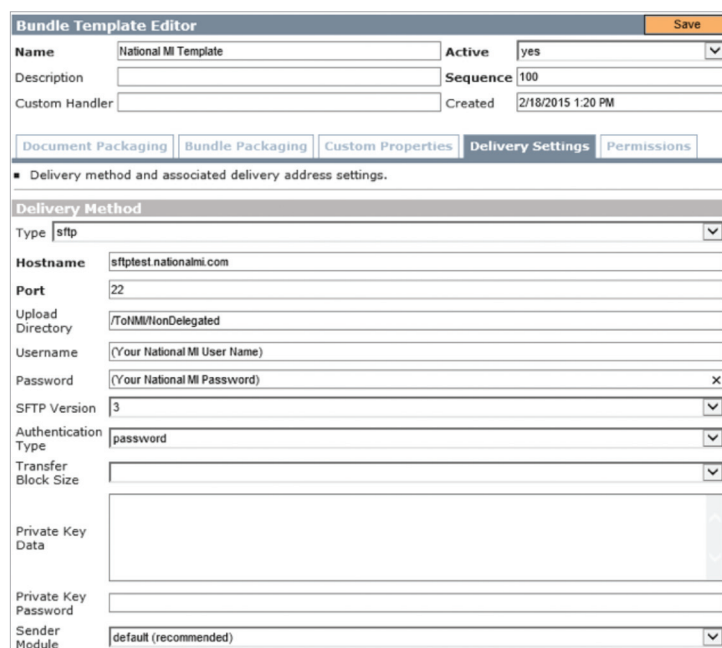## 1. Install the National MI Bundle Template

The National MI Bundle Template is available as a database script to run against the XDOC database. Initially, you can find this script as a Solution Article on the Scrypt Support web site. Once your database administrator has run this script against the XDOC database, you will see this bundle template available in the list of bundle templates in XDOC.

2. Configure the Delivery Settings in the Bundle Template

Open the bundle template and go to the Delivery Settings tab. Configure the settings exactly as shown and click SAVE. (Below are the settings for the Test site. Please email ecommercesupport@nationalmi.com to request credentials and set-up information for the production site).
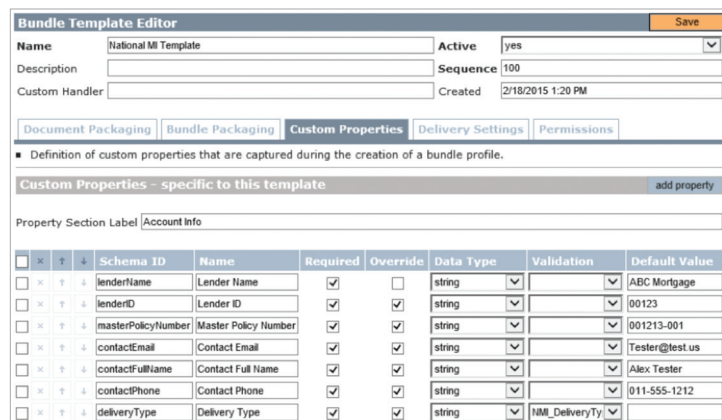
NOTE: The Upload Directory setting in the screenshot is for sending non-delegated loans. For delegated loans, the Upload Directory needs to be set to — **/ToNMI/Delegated.**
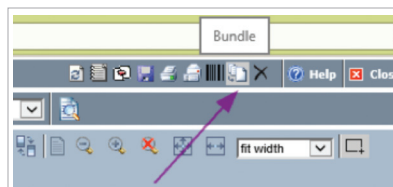

3. Configure the Custom Properties tab in the Bundle Template

The Custom Properties tab has a number of custom fields required for National MI delivery that need to be configured at time of delivery. You should also assign default values to the first few fields, since they are unlikely to change from loan to loan. When you are done, click SAVE.

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4. Create a Document Stack
for National MI Delivery

Create a Document Stack for National MI delivery.
See the screen shot here for an example:

5. Create a Bundle Profile for
National MI Delivery

a. In the XDOC Admin, go to the Bundle Profiles
Section and click CREATE.

b. In the Bundle Profile Editor choose the National
MI Bundle Template and the National MI
Document Stack.

c. Click SAVE.

Sending a Bundle

Sending a bundle to National MI is a very simple process that is exactly like sending a bundle to any other investor, servicer, auditor, etc. To send a bundle to National MI, follow these easy steps:

1. In XDOC, navigate to the loan you
want to send to National MI.

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2. Click on the Bundling button.

3. Choose the National MI Bundle Profile

4. Fill out fields with the appropriate values. The fields that are bold are required. When you're done filling out all fields, click the orange SEND BUNDLE button at the bottom right of the screen.

5. You will receive a dialog box confirming that the bundle was sent successfully

When sending the bundle, the following are the list of fields with allowable values:

FIELD	NOTES AND VALUES
Lender ID	The number assigned to you by National MI
Master Policy Number	The number assigned to you by National MI (it may be the same as the Master Policy Number)
Contact Email	Email address of the contact person at your company
Contact Full Name	Full Name of the contact person at your company
Contact Phone	Phone Number of the contact person at your company
Delivery Type	Non-Delegated or Delegated

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