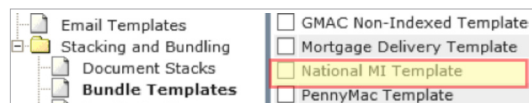


This guide details the specific instructions for XDOC Administrators to properly create a bundle profile to send loans directly to National MI for the issuance of mortgage insurance. In order to send loan document packages to National MI, you must first contact National MI at ecommercesupport@nationalmi.com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

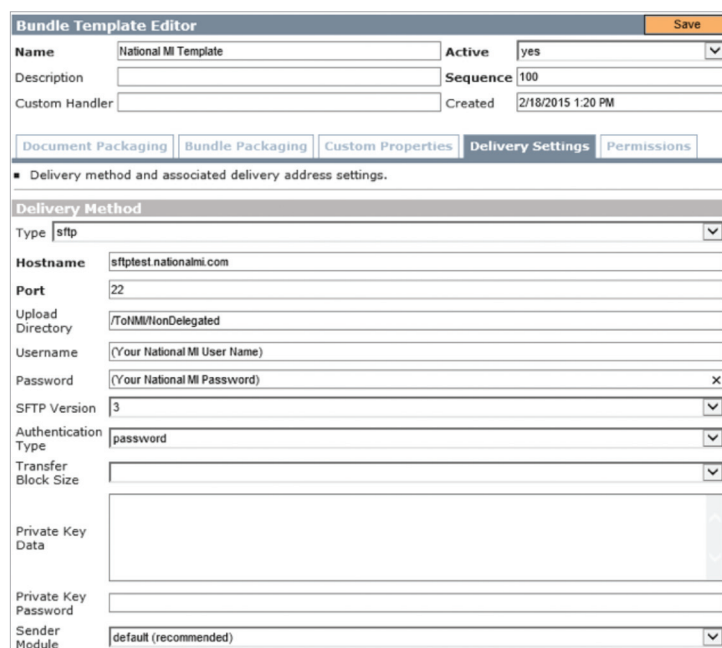
The National MI Bundle Template is available as a database script to run against the XDOC database. Initially, you can find this script as a Solution Article on the Script Support web site. Once your database administrator has run this script against the XDOC database, you will see this bundle template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

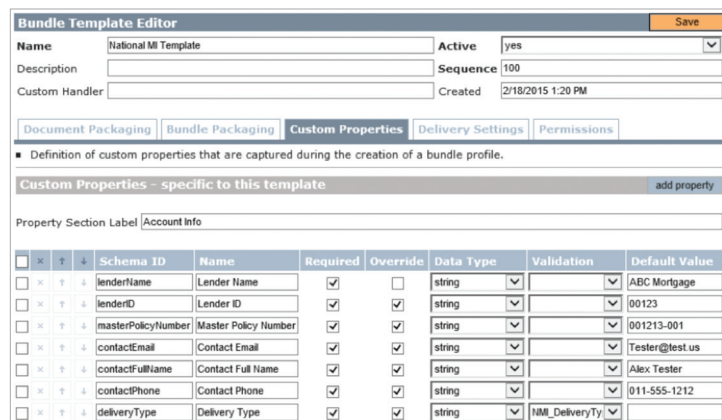
NOTE: The Upload Directory setting in the screenshot is for sending non-delegated loans. For delegated loans, the Upload Directory needs to be set to – **/ToNMI/Delegated**.



Bundle Template Editor		Save
Name	National MI Template	Active: yes
Description		Sequence: 100
Custom Handler		Created: 2/18/2015 1:20 PM
<div>Document Packaging Bundle Packaging Custom Properties Delivery Settings Permissions</div>		
Delivery method and associated delivery address settings.		
Delivery Method		
Type	sftp	
Hostname	sftp-test.nationalmi.com	
Port	22	
Upload Directory	/ToNMI/NonDelegated	
Username	(Your National MI User Name)	
Password	(Your National MI Password)	
SFTP Version	3	
Authentication Type	password	
Transfer Block Size		
Private Key Data		
Private Key Password		
Sender Module	default (recommended)	

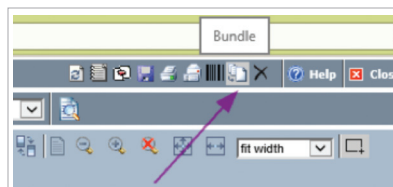
3. Configure the Custom Properties tab in the Bundle Template

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.



Bundle Template Editor		Save					
Name	National MI Template	Active: yes					
Description		Sequence: 100					
Custom Handler		Created: 2/18/2015 1:20 PM					
<div>Document Packaging Bundle Packaging Custom Properties Delivery Settings Permissions</div>							
Definition of custom properties that are captured during the creation of a bundle profile.							
Custom Properties – specific to this template							
Property Section Label: Account Info							
	Schema ID	Name	Required	Override	Data Type	Validation	Default Value
<input type="checkbox"/>	lenderName	Lender Name	<input checked="" type="checkbox"/>	<input type="checkbox"/>	string	<input type="checkbox"/>	ABC Mortgage
<input type="checkbox"/>	lenderID	Lender ID	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	string	<input type="checkbox"/>	00123
<input type="checkbox"/>	masterPolicyNumber	Master Policy Number	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	string	<input type="checkbox"/>	001213-001
<input type="checkbox"/>	contactEmail	Contact Email	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	string	<input type="checkbox"/>	Tester@test.us
<input type="checkbox"/>	contactFullName	Contact Full Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	string	<input type="checkbox"/>	Alex Tester
<input type="checkbox"/>	contactPhone	Contact Phone	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	string	<input type="checkbox"/>	011-555-1212
<input type="checkbox"/>	deliveryType	Delivery Type	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	string	<input checked="" type="checkbox"/>	NMI_DeliveryTy

- Click on the Bundling button.



- Choose the National MI Bundle Profile

Bundle Documents

Loan: 1184002067
 LoanID: 201006
 Borrower: Support Test

Bundle: Profile ☒ | Set ☐ | Manual ☐ | Chase Template National MI Non-Delegated Test Refresh

- 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.

Loan: 1184002067
 LoanID: 201006
 Borrower: Support Test

Bundle: Profile ☒ | Set ☐ | Manual ☐ | National MI Non-Delegated Test Refresh

Profile Information
 Profile Name: National MI Non-Delegated Test
 Template Name: National MI Template
 Description:
 Profile ID: 2150218182640985000
 Delivery Type:

Document Selection: Profile ☒ | Stack ☐ | Manual ☐ | -- use documents defined in profile --

Document Results: Matching Documents: 1 Missing Documents: 0

Exists	Req	Document Type	Status Message
<input type="checkbox"/>		1003 - Final	
<input type="checkbox"/>		1009 (Transmittal Summary)	
<input type="checkbox"/>		Bank Statement	
<input type="checkbox"/>		Credit Report	
<input type="checkbox"/>		HUD-1	

Override Settings

Lender ID: 00123
 Master Policy Number: 001213-001
 Contact Email: Tester@testus
 Contact Full Name: Alex Tester
 Contact Phone: 011-555-1212
 Delivery Type: Non-Delegated

Generate for Download only: ☐ Send Bundle

- 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