DocMagic

AutoPrep™

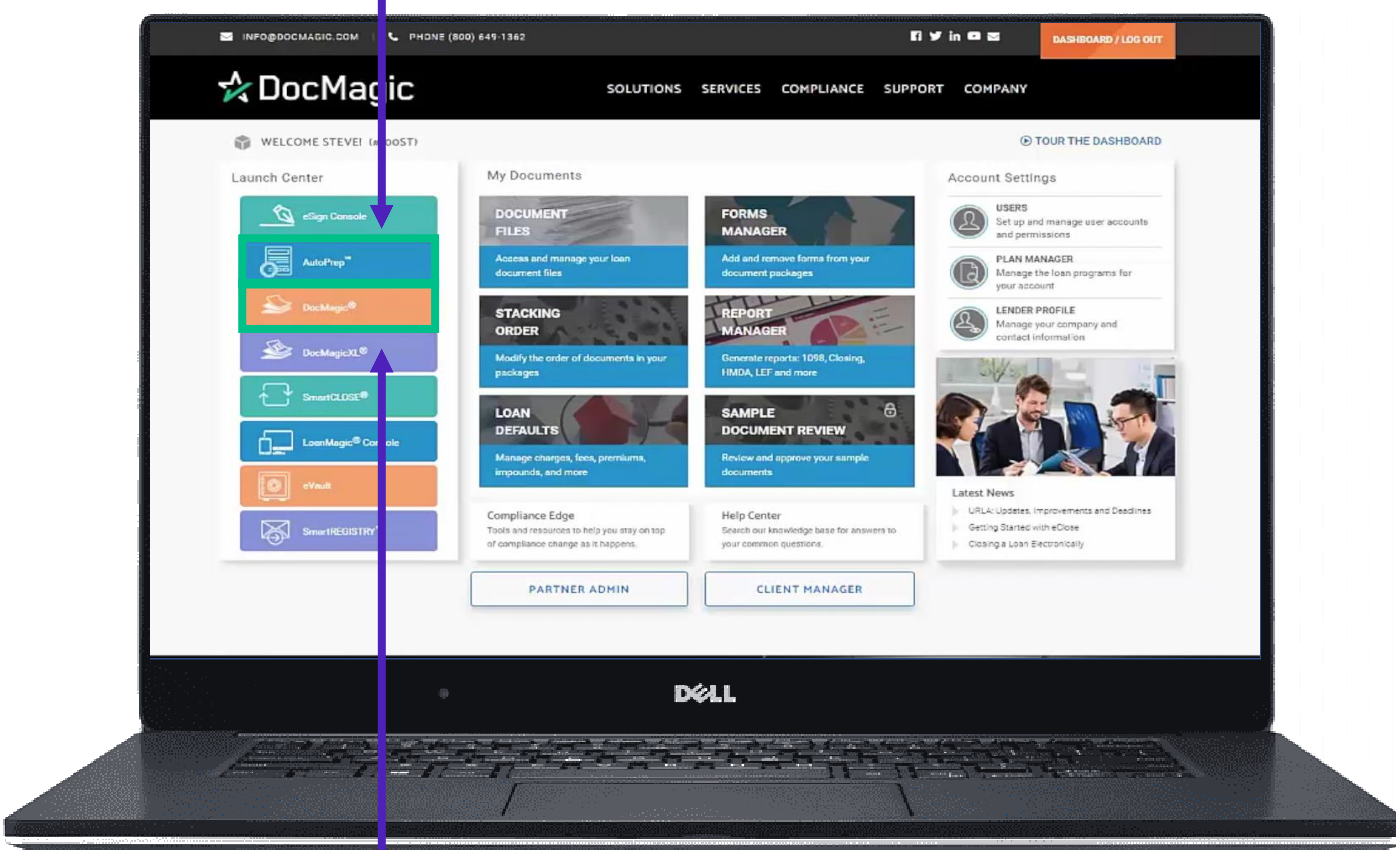
The Complete Guide

Table of Contents

AutoPrep™ is DocMagic's proprietary software that automatically tags documents.

Determine which of these use cases suits you best and skip to that portion of the guide. Happy tagging!

Start by going to the DocMagic dashboard. If you do not need to generate an eNote, click on the AutoPrep™ icon and skip to page 6 of this guide.

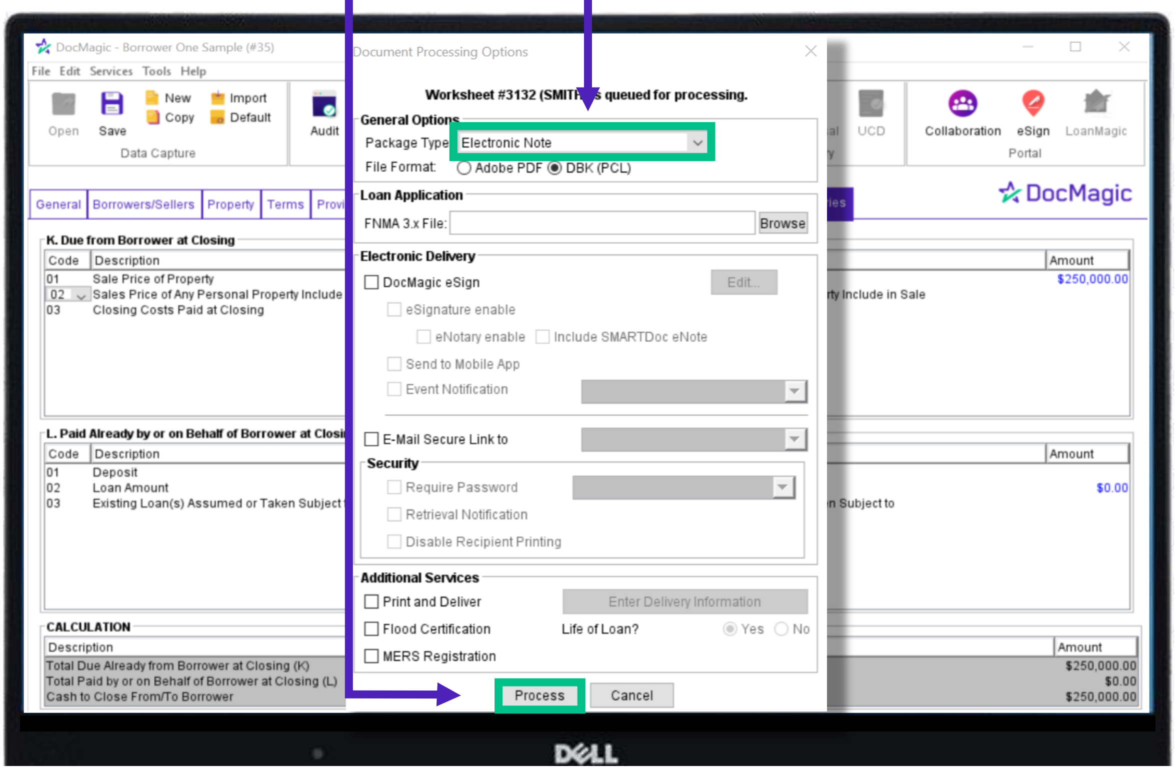


If you need to generate an eNote, click on DocMagic to launch DocMagic Online.

AutoPrep™ - DocMagic Online

Draw The Rest of the Owl

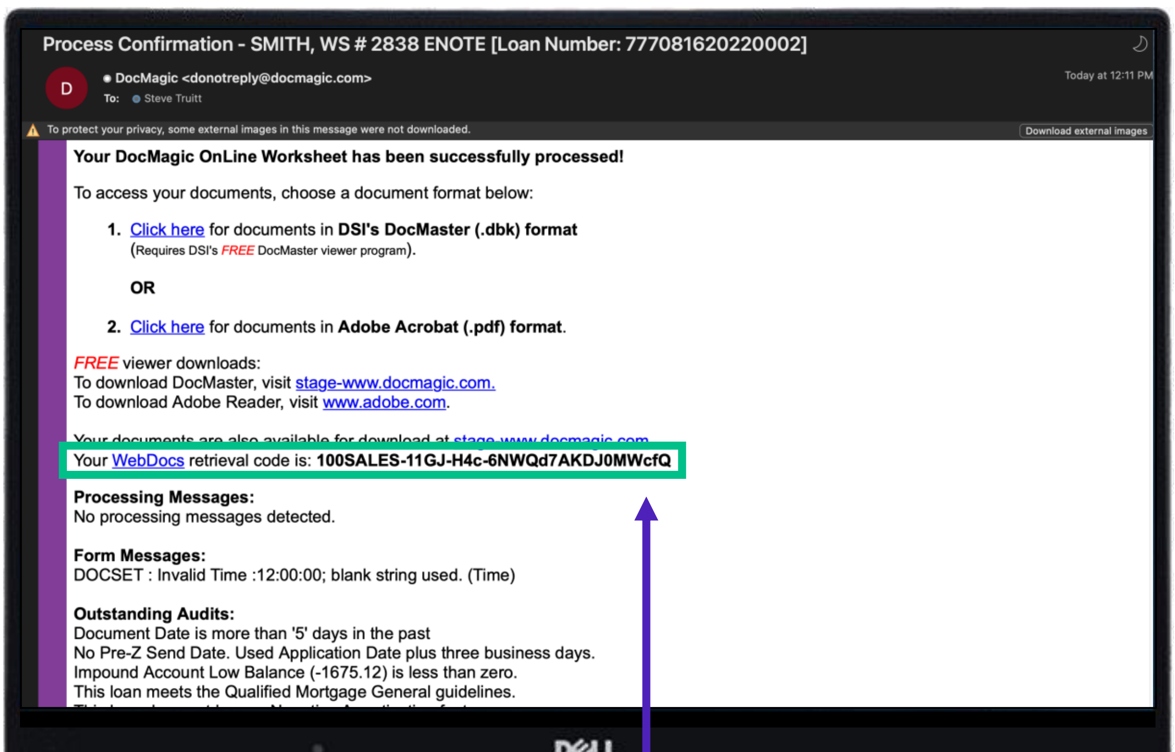
Process the eNote from your loan file. Select Electronic Note under Package Type and click Process.



Not sure how we got here? Please check out our [DocMagic Online training section of the Product Training page](#).

Grab The WebDocs Code

When you process the eNote, you will receive this confirmation email.


Process Confirmation - SMITH, WS # 2838 ENOTE [Loan Number: 777081620220002]

DocMagic <donotreply@docmagic.com>
To: Steve Truitt
Today at 12:11 PM

To protect your privacy, some external images in this message were not downloaded.
Download external images

Your DocMagic OnLine Worksheet has been successfully processed!

To access your documents, choose a document format below:

1. Click here for documents in **DSI's DocMaster (.dbk) format**
   (Requires DSI's *FREE* DocMaster viewer program).

   OR

2. Click here for documents in **Adobe Acrobat (.pdf) format**.

FREE viewer downloads:
To download DocMaster, visit stage-www.docmagic.com.
To download Adobe Reader, visit www.adobe.com.

Your documents are also available for download at stage-www.docmagic.com
Your WebDocs retrieval code is: **100SALES-11GJ-H4c-6NWQd7AKDJ0MWcfQ**

Processing Messages:
No processing messages detected.

Form Messages:
DOCSET : Invalid Time :12:00:00; blank string used. (Time)

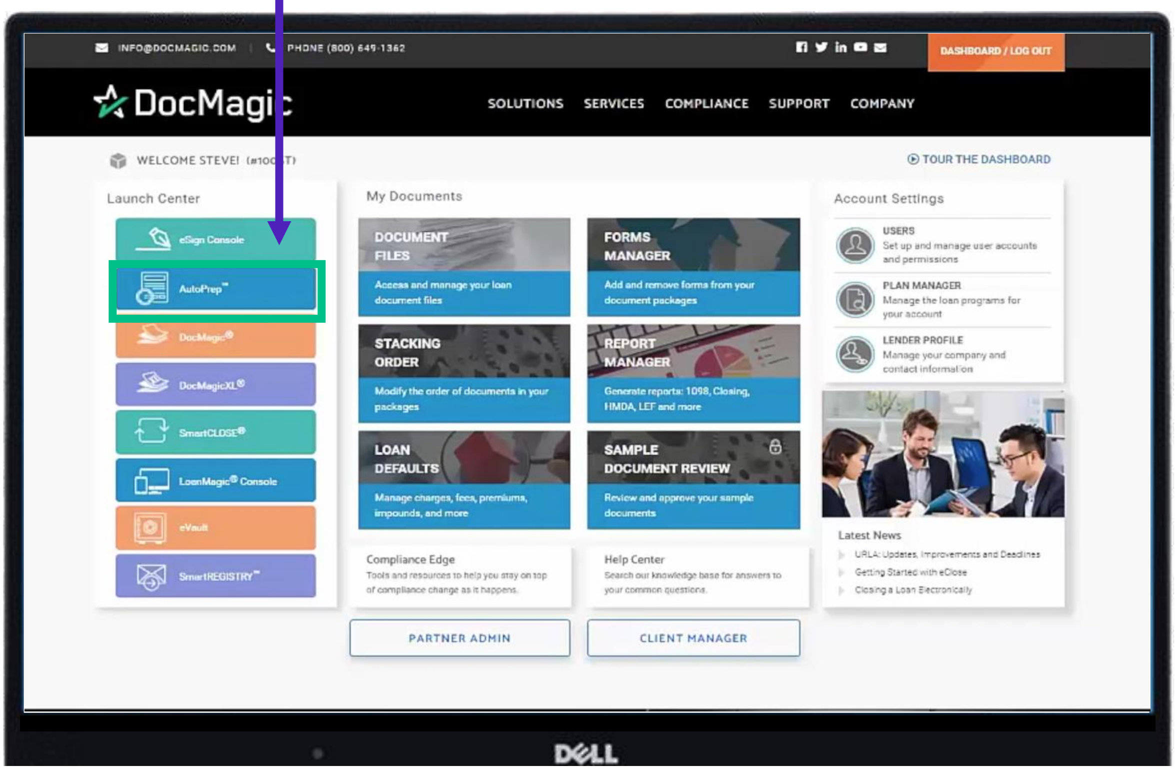
Outstanding Audits:
Document Date is more than '5' days in the past
No Pre-Z Send Date. Used Application Date plus three business days.
Impound Account Low Balance (-1675.12) is less than zero.
This loan meets the Qualified Mortgage General guidelines.

Copy this WebDocs retrieval code. You will need it when you upload documents to AutoPrep™.

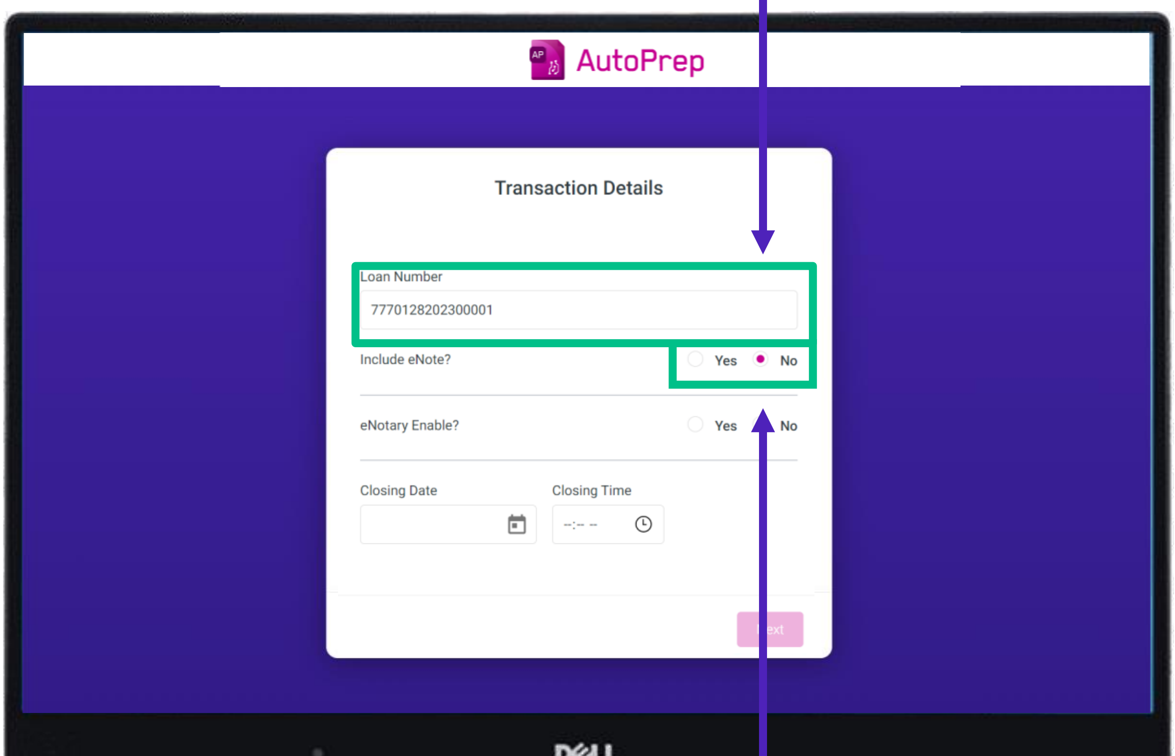
AutoPrep™ - DocMagic Online

Start AutoPrep™

Go to the dashboard and choose AutoPrep™ from the Launch Center.



Once the page loads, you'll be greeted with this screen. Start by entering the Loan Number.

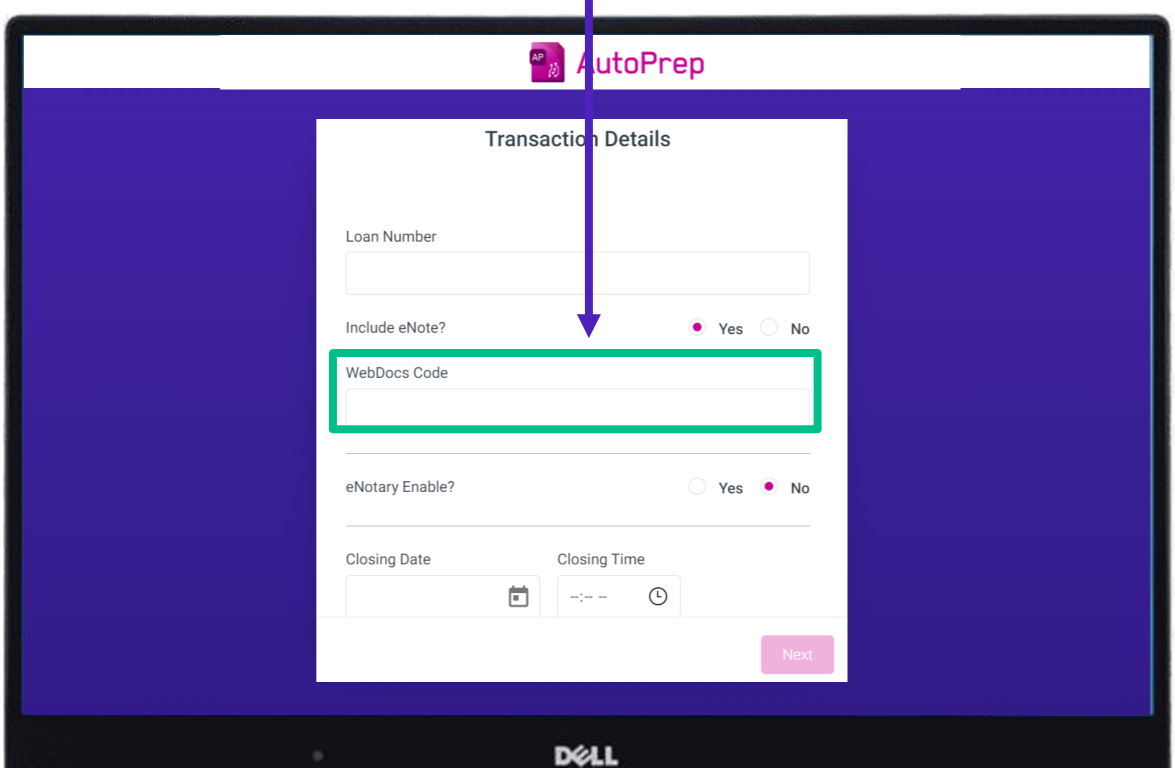


Select the radio button to indicate whether you will include an eNote or not.

AutoPrep™

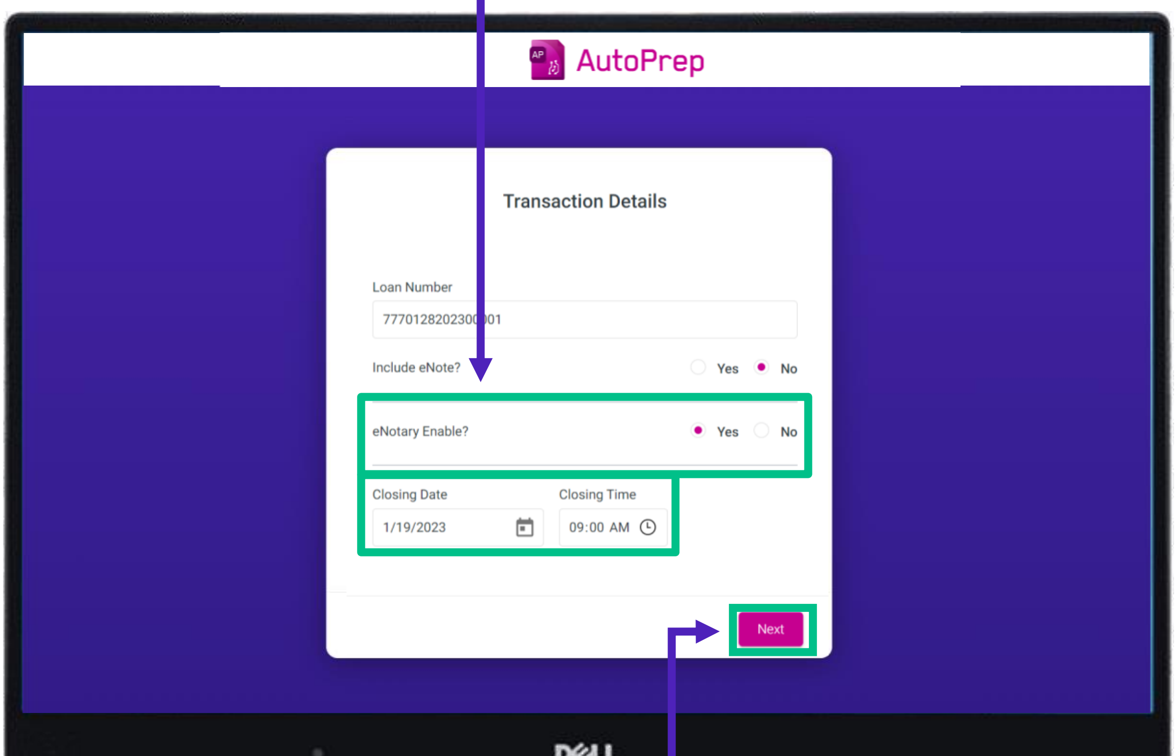
eNote WebDocs Code

If you select Yes for Include eNote, a field will appear below where you can enter in your WebDocs Code.



If you are not using an eNote, ignore this page.

Regardless of whether you include an eNote, you will still need to select whether eNotary is enabled and enter a closing date and time.

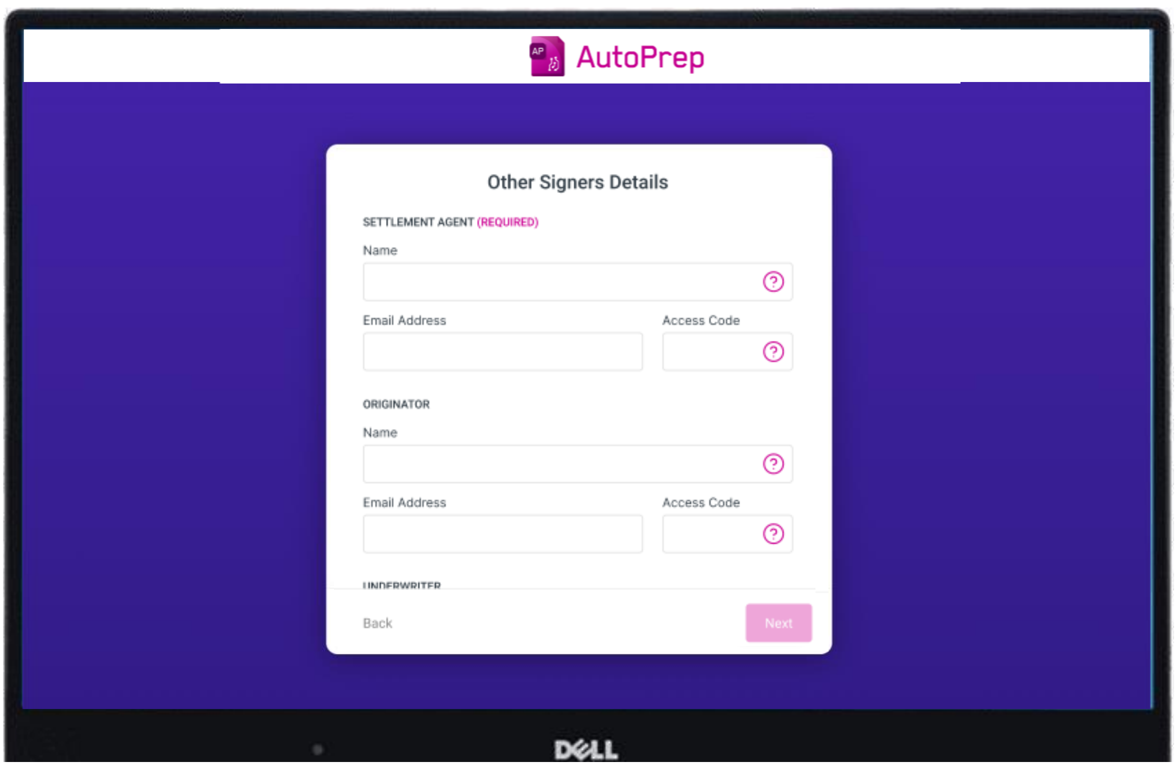


Once you enter enough information, the Next button will no longer be greyed out. Click it to continue.

AutoPrep™

Participants

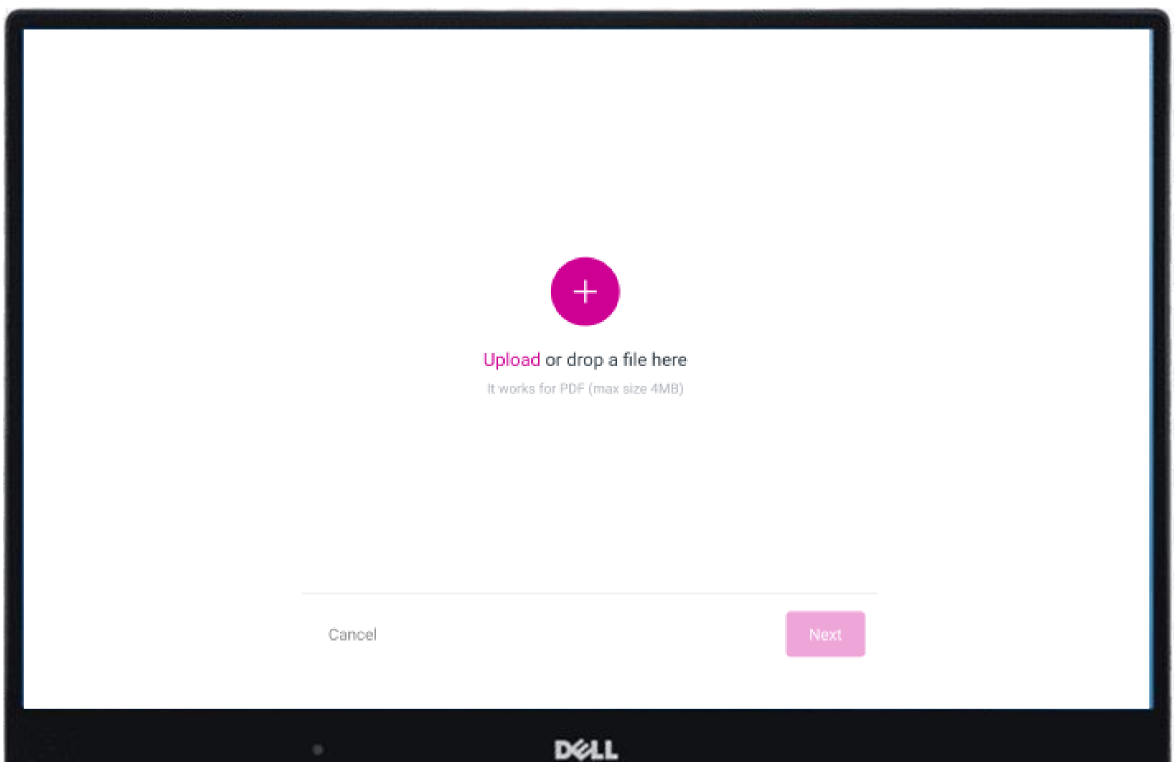
Enter information for buyer, seller, settlement agent, originator, underwriter, and notary.



Borrower information needs to be entered EXACTLY as it appears in the document.

Uploading a File

Upload a PDF that you wish to prepare.



AutoPrep™

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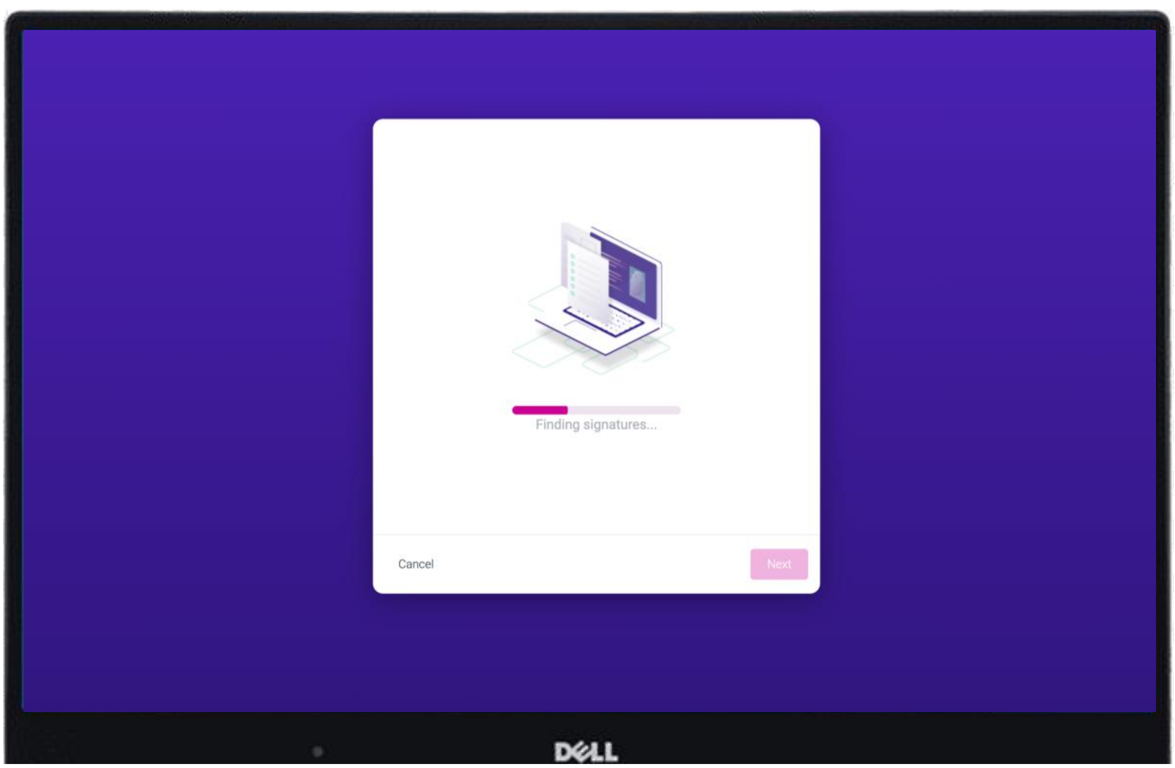
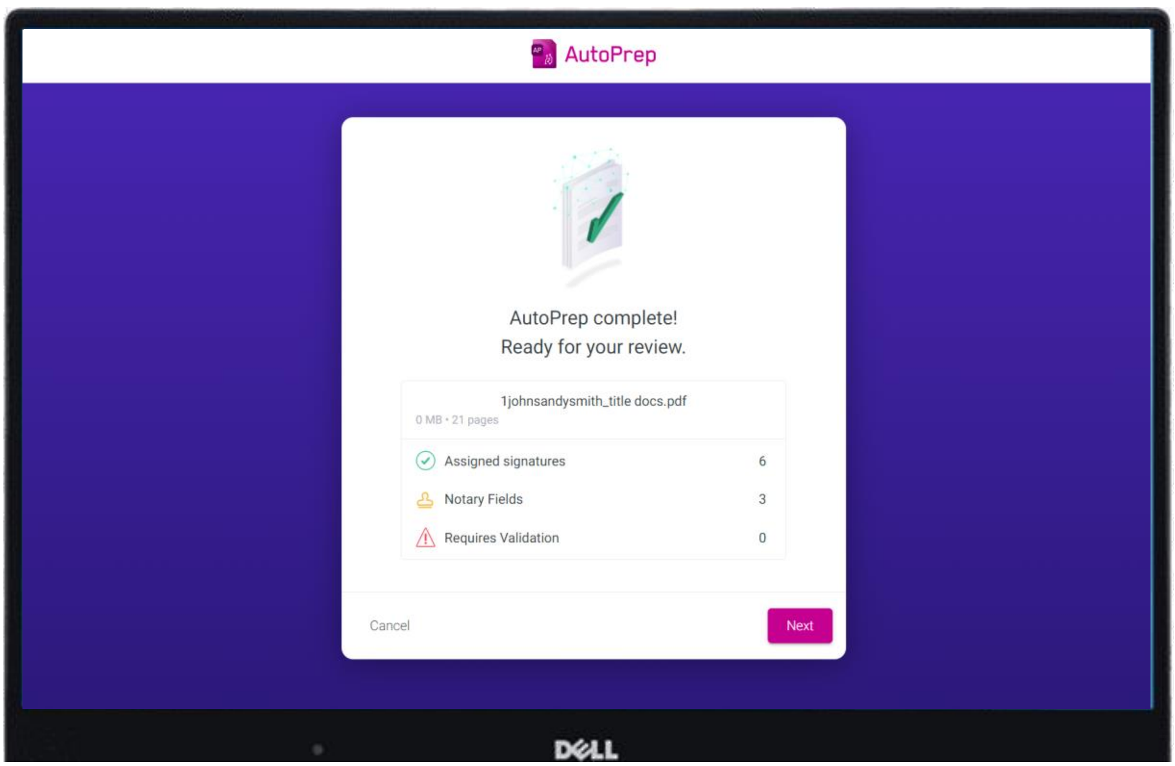
AutoPrep™ will use Optical Character Recognition (OCR) and A.I. to identify signatures lines for Borrowers and other participants including Notaries.



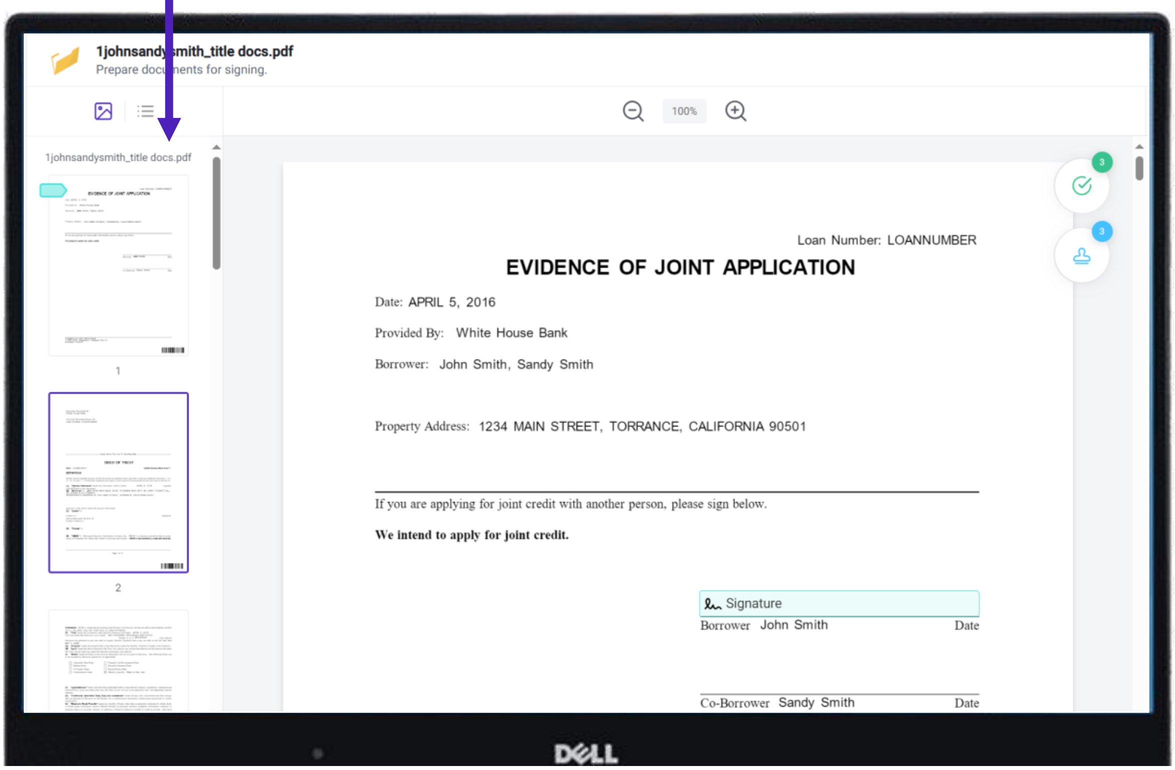
Document Pre-Review

This screen will confirm the number of signatures, notary fields, and unassigned signatures found.



Document Editor

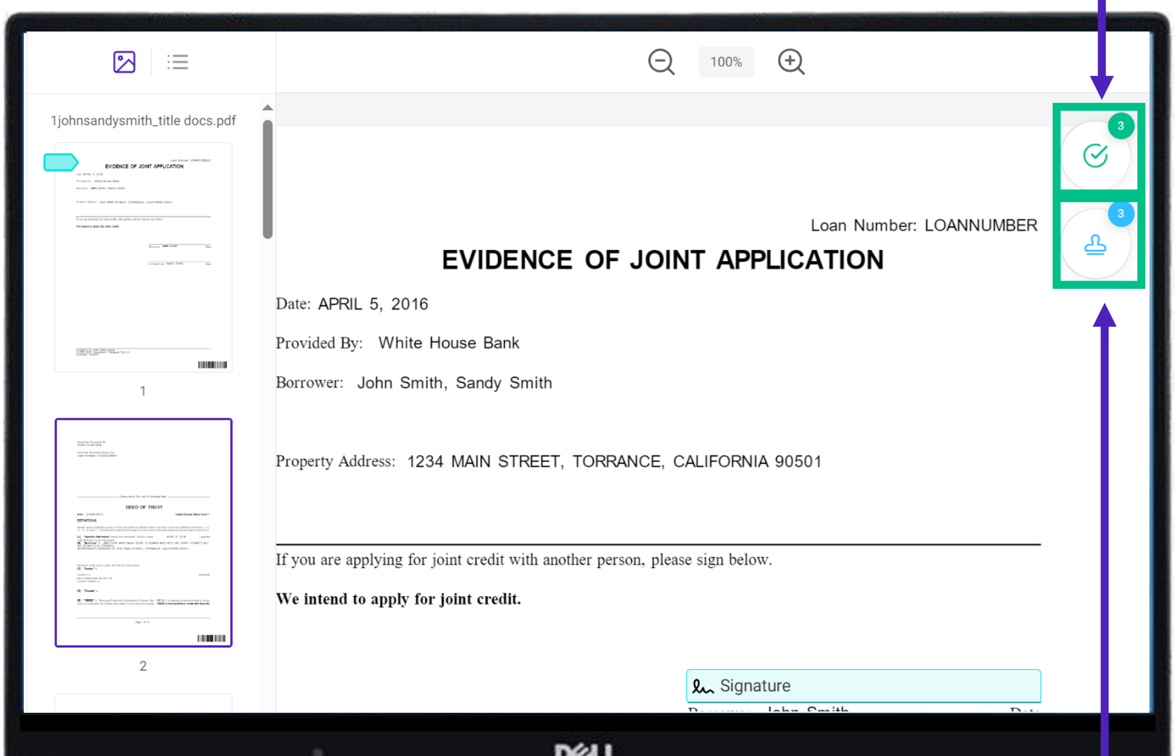
Next, you'll be brought to our Document Editor. If you need to find a specific page on the document, you may scroll through the column on the left.



AutoPrep™

Participant vs Notary Tag

Click on the green circle with the *check mark* to jump to the next Participant tag. The number next to the circle tells you how many Participant tags are in this document package – 3 in this case.

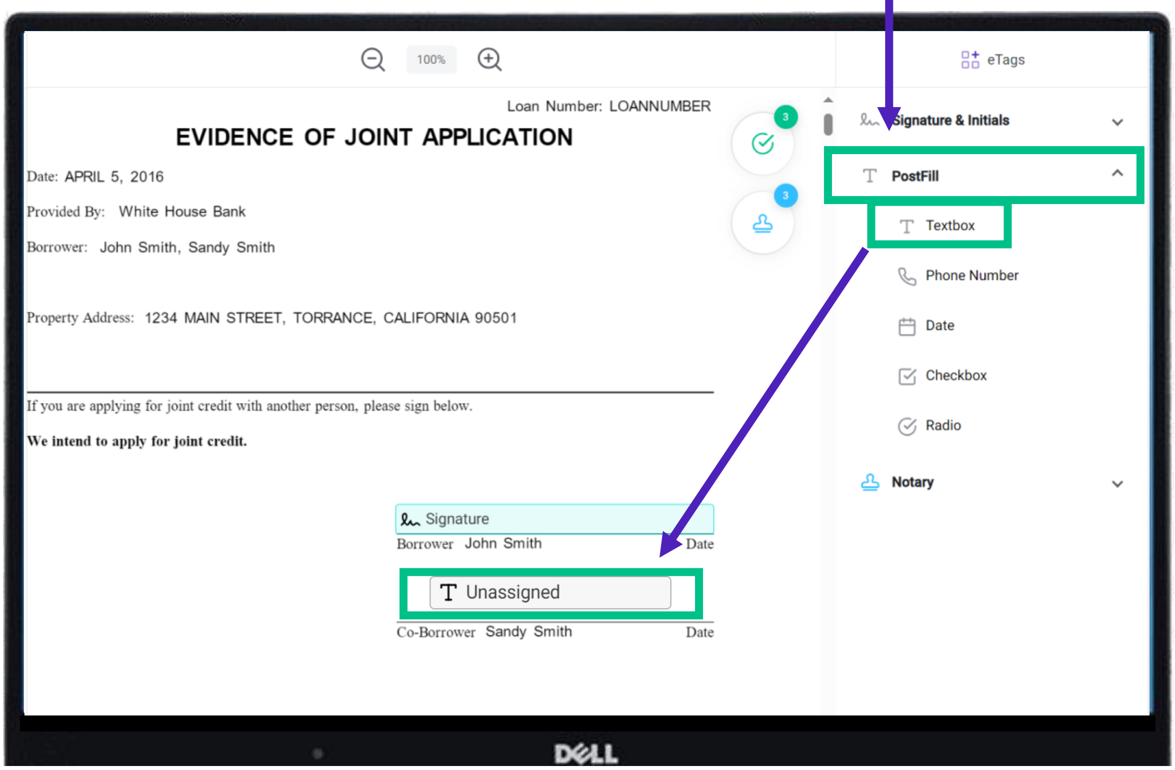


Click on the blue circle with the *stamp* to jump to the next Notary tag. The number next to the circle tells you how many Notary tags are in this document package – 3 in this case.

AutoPrep™

Adding Tags (Participants)

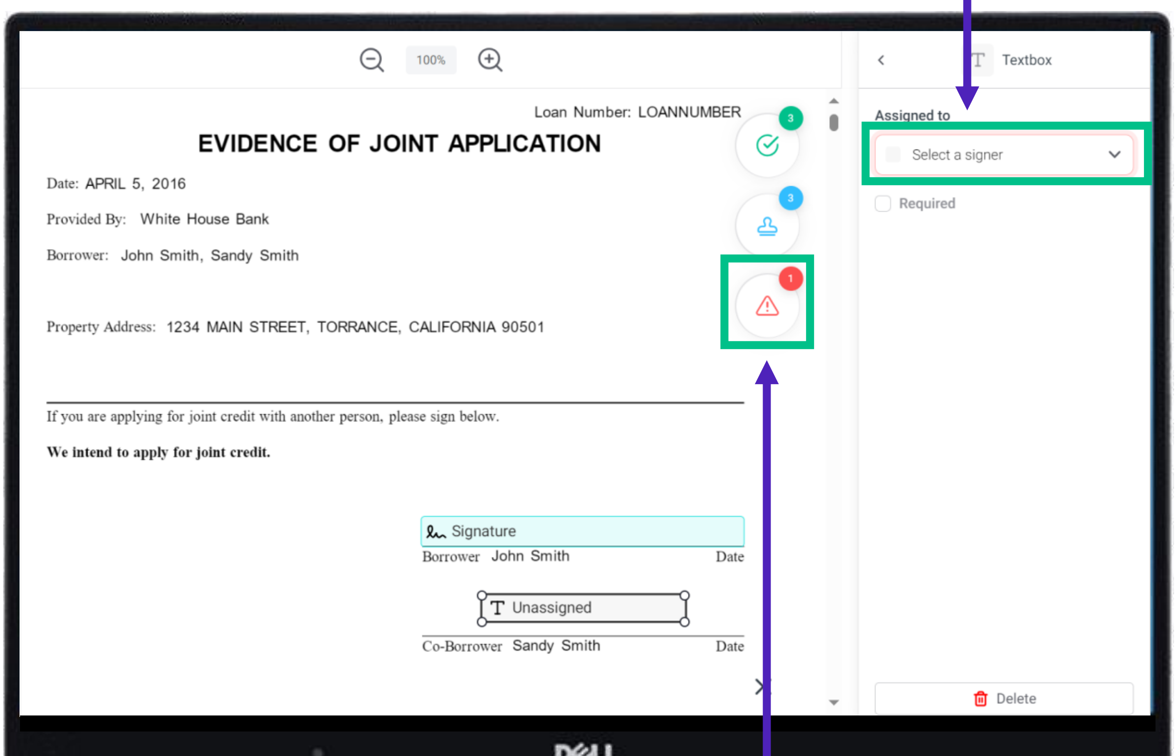
If you need to add something that must be filled out by a borrower, you can do that in PostFill. Click the little arrow to expand the list of options.



Click and drag the item you want (Textbox in this case) to your desired spot.

Adding Tags (Participants)

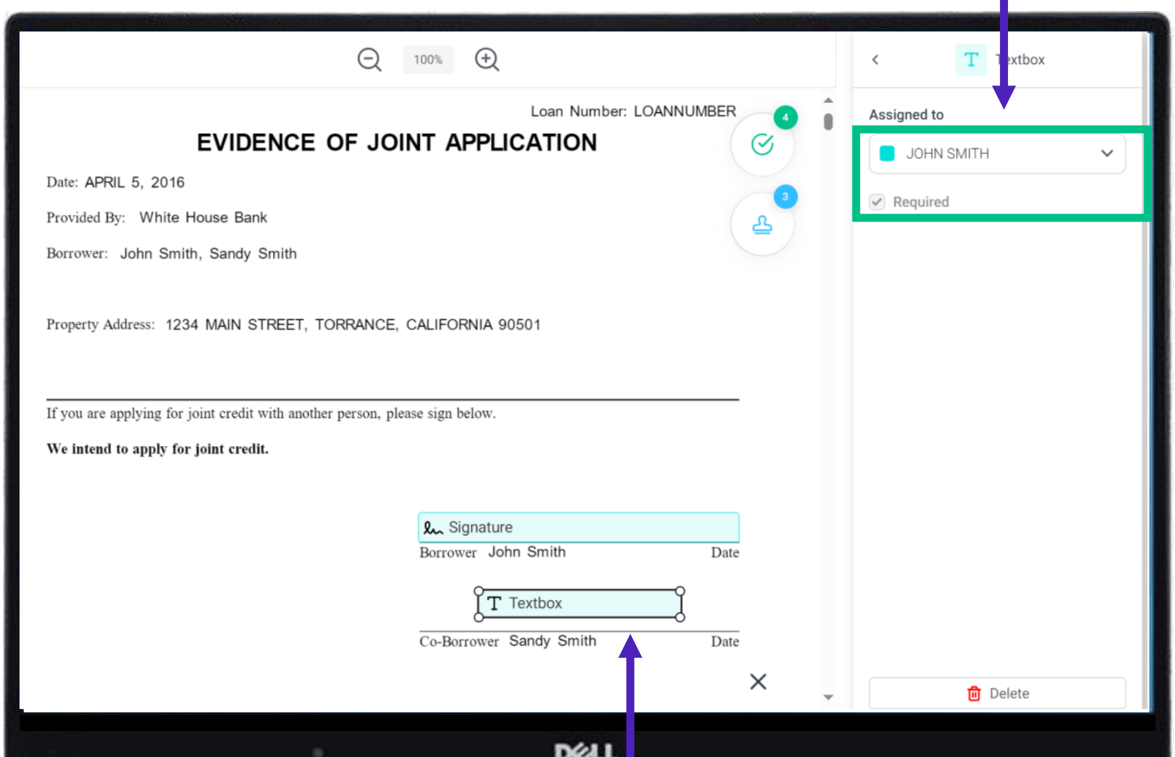
When you let go of the mouse, you'll be asked to Select a signer.



This warning triangle will appear – it is because you have an Unassigned text box. *If AutoPrep detects a signature field, but can't link it with a signer, you may also see this icon.*

Adding Tags (Participants)

Here's what that looks like after you select a Signer. Checking the Required box mean that the signer can't proceed unless they fill it out.



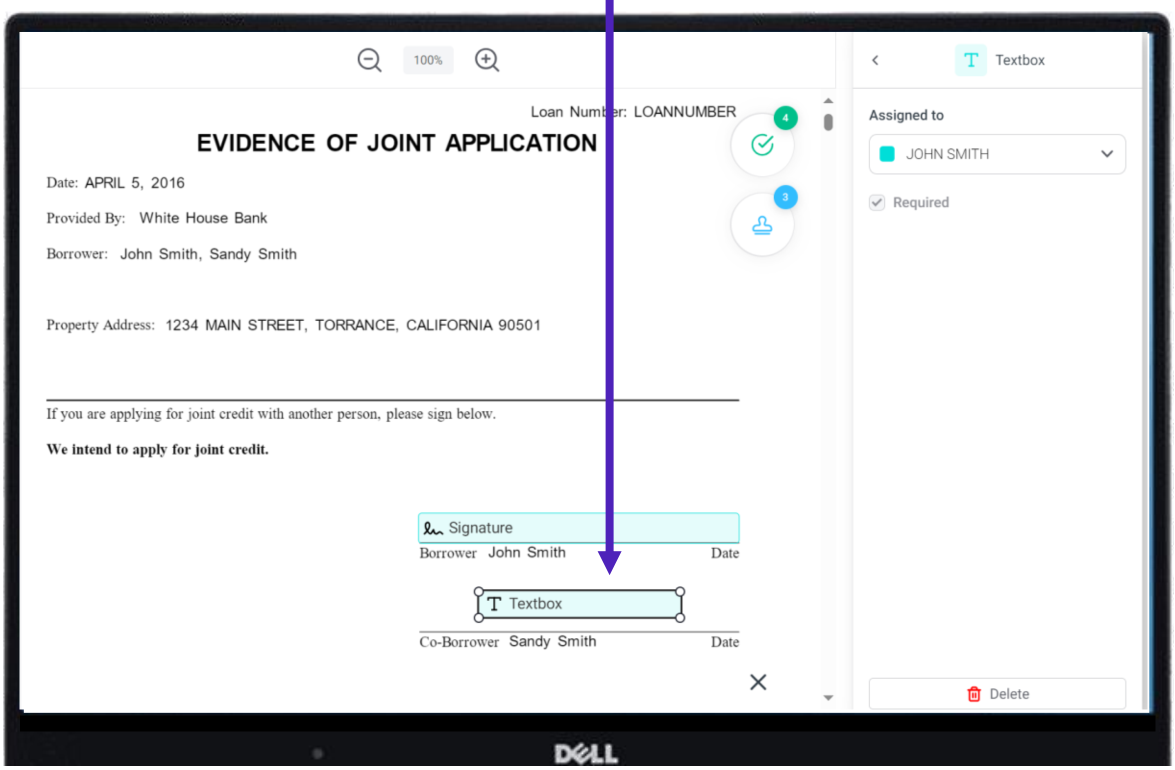
You'll notice that the warning triangle is gone, and that the Textbox no longer says Unassigned.

Please be careful not to assign borrower tags on notary documents and vice versa. This can cause confusion and delays during the signing experience.

AutoPrep™

Selecting and Moving a Tag

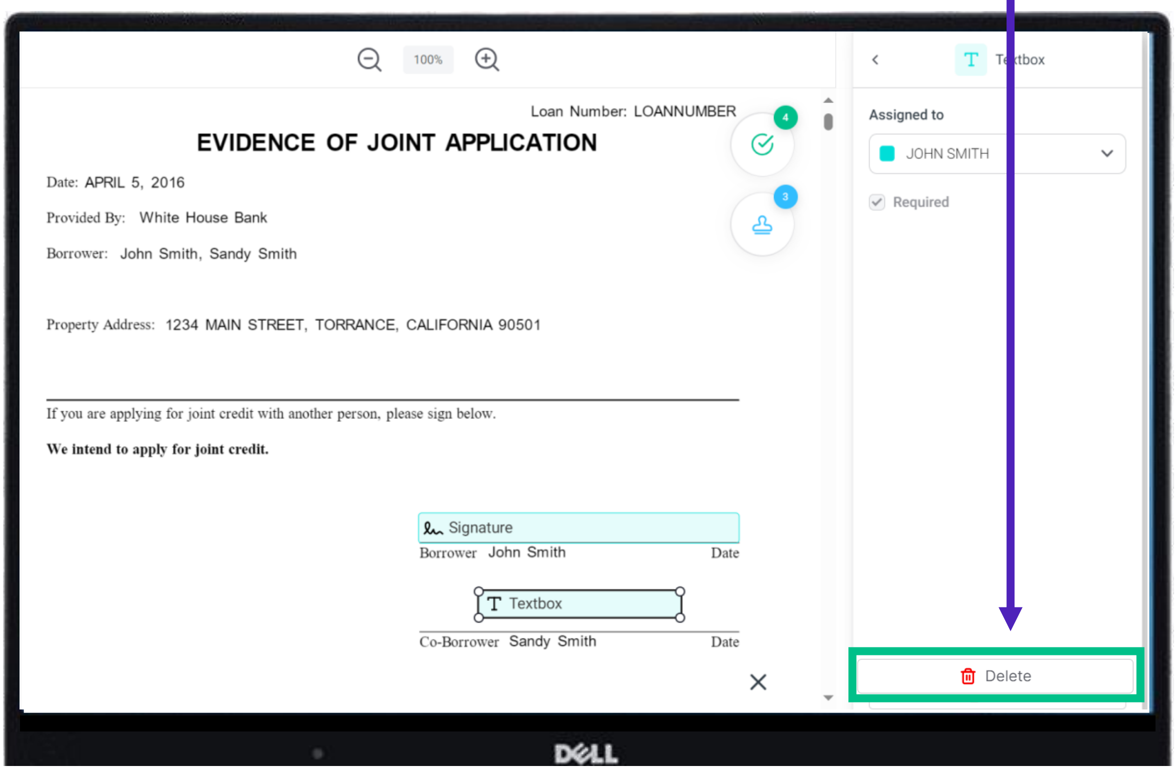
Click on an editable tag at any time to select it. You'll know that the tag is selected when you see those circles on the four corners of the tag.



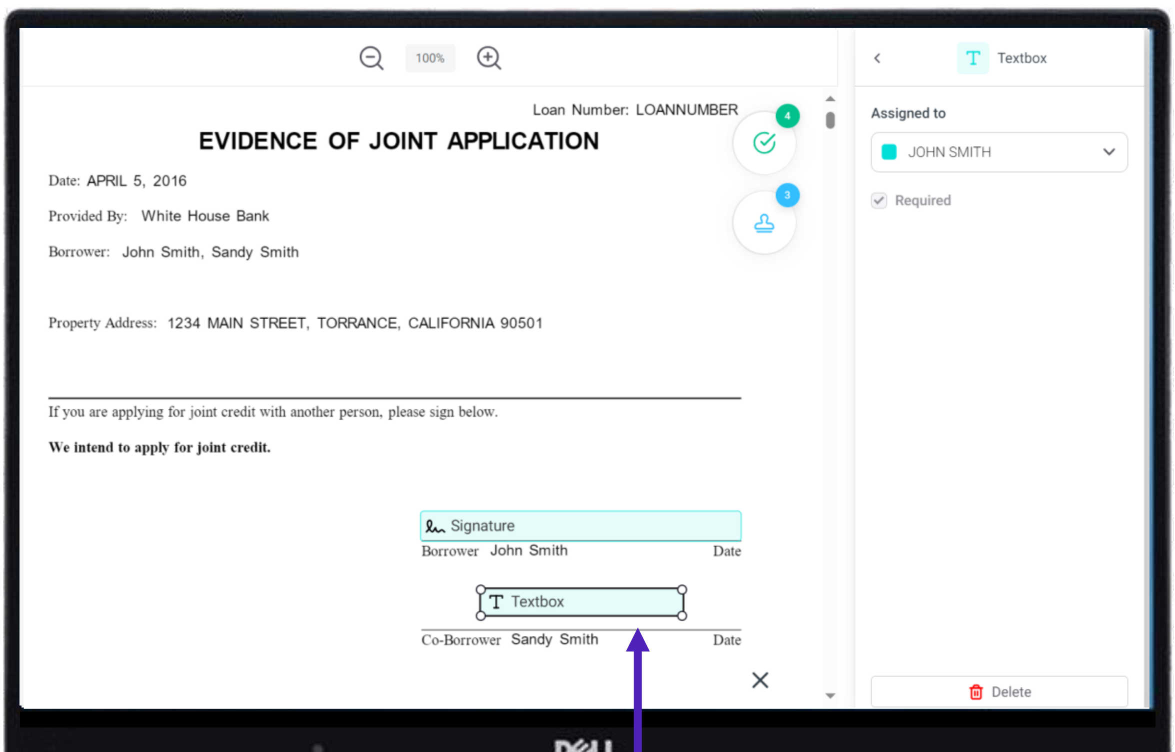
You can move it around to your desired location by clicking and dragging it with the mouse. You can also change the dimensions by dragging the dots on the corners.

Deleting a Tag

To delete a tag that you added, click Delete or press backspace or delete on your keyboard.



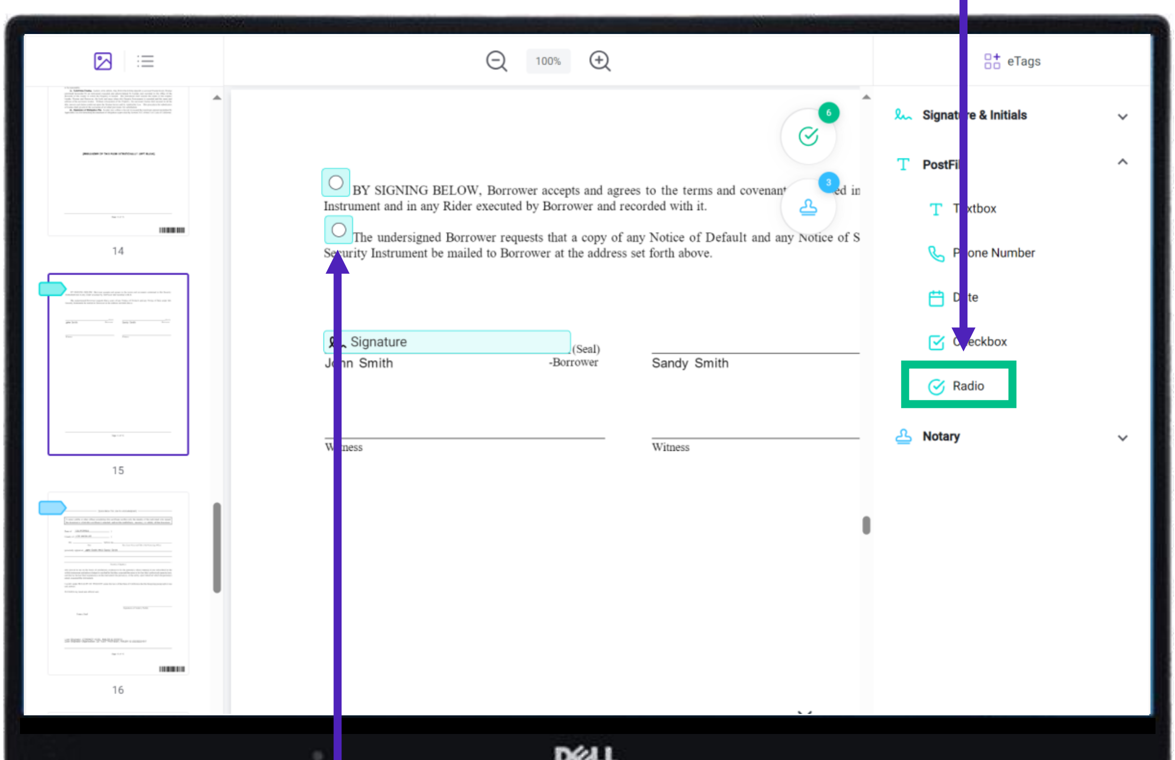
It's important to remember that during the signing experience, you can no longer edit a document after it's been signed. You can still edit if no signatures have been applied.



If you added this textbox, make sure it's filled out before any signatures are applied.

Radio Buttons

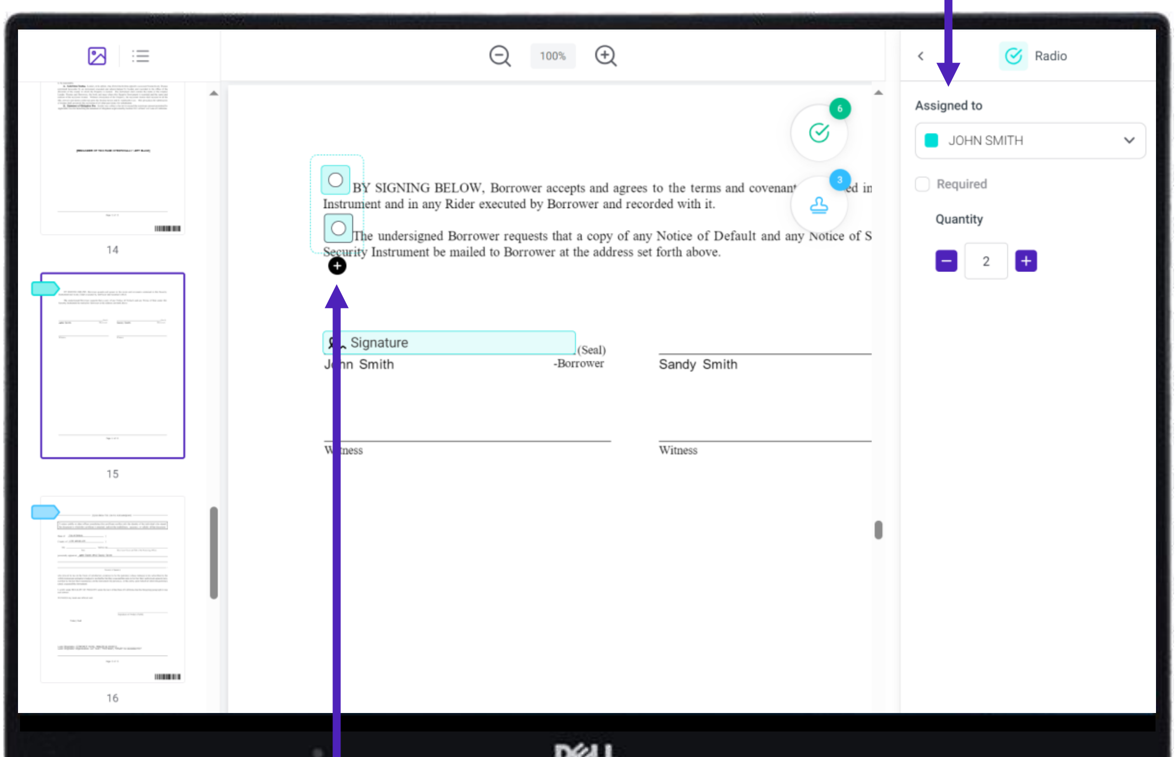
If you need a participant to pick one option from several – like they're answering a multiple-choice test question – choose Radio from Postfill.



Drag and drop to your desired location, like any other tag.

Radio Buttons

On the right column, you can assign the radio buttons to a participant, toggle whether it's required, and change the quantity of options.

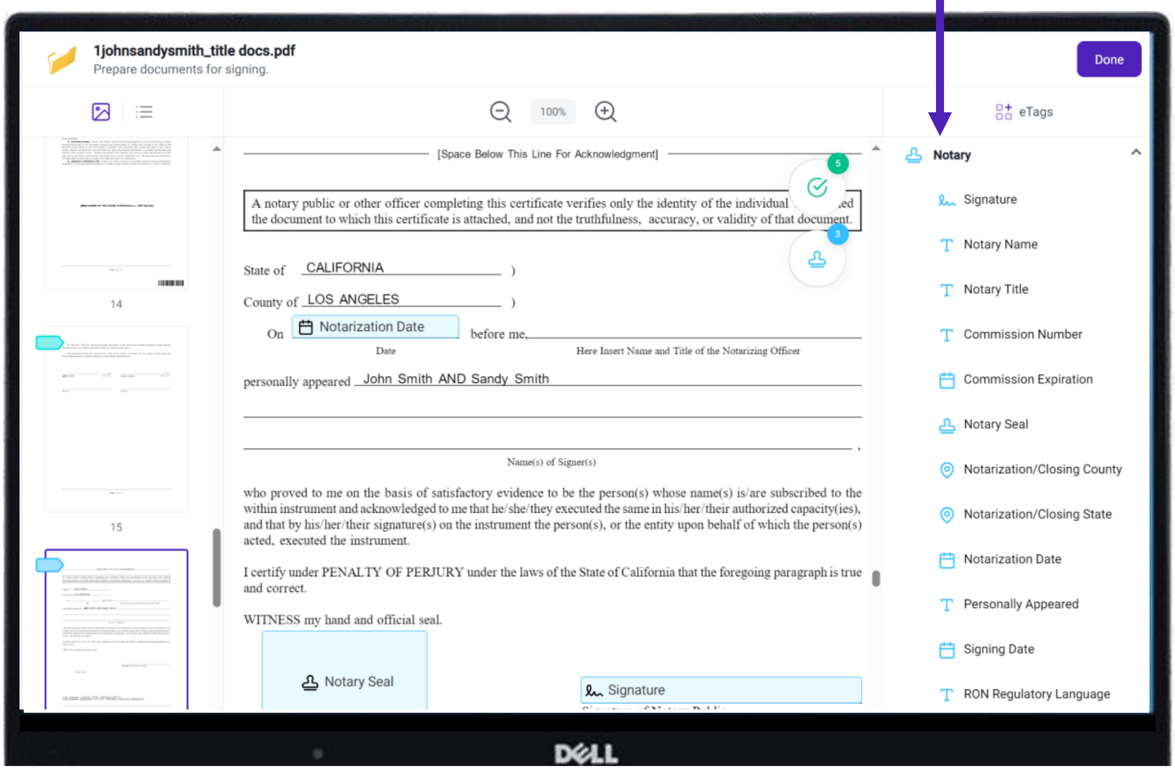


You also add additional options by clicking here.

AutoPrep™

Notary Tags

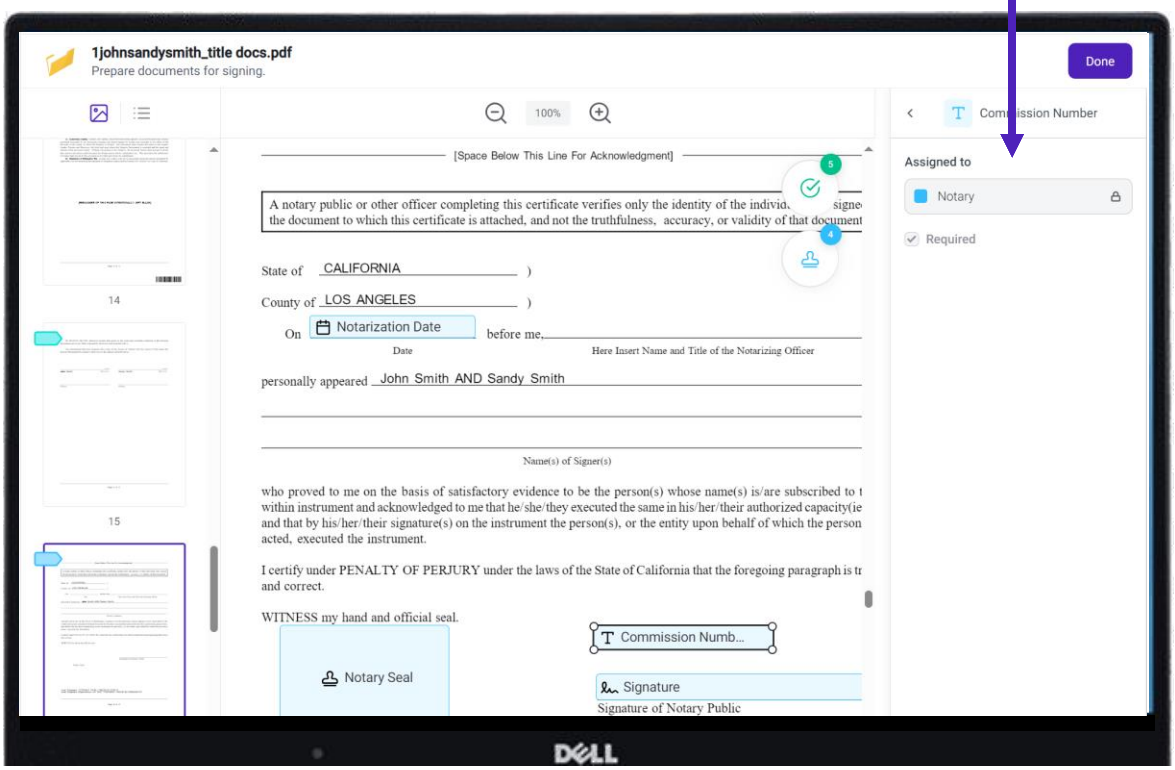
If you need to add something for the Notary, make sure to grab it from the Notary section.



AutoPrep™

Notary Tags

If you choose a tag from the Notary section, it will be required, and you won't be able to assign it to anyone else.

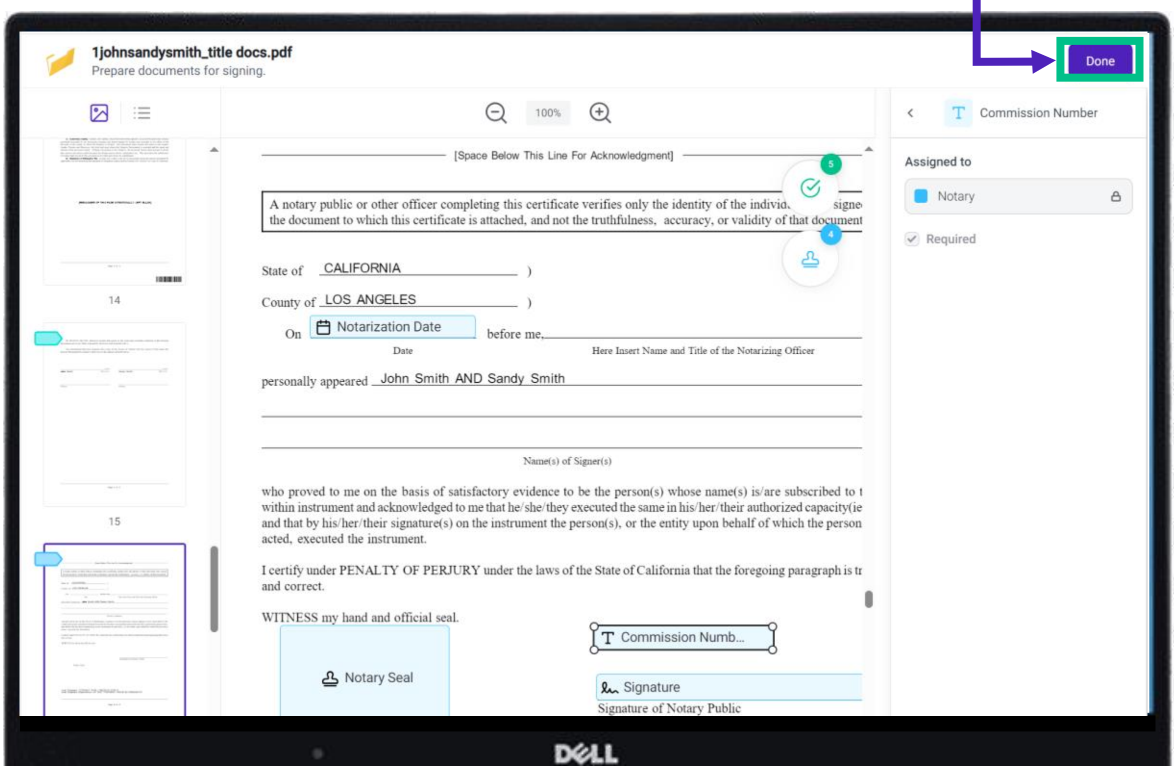


Similarly, if you grab a non-Notary tag, you won't be able to assign it to a Notary.

AutoPrep™

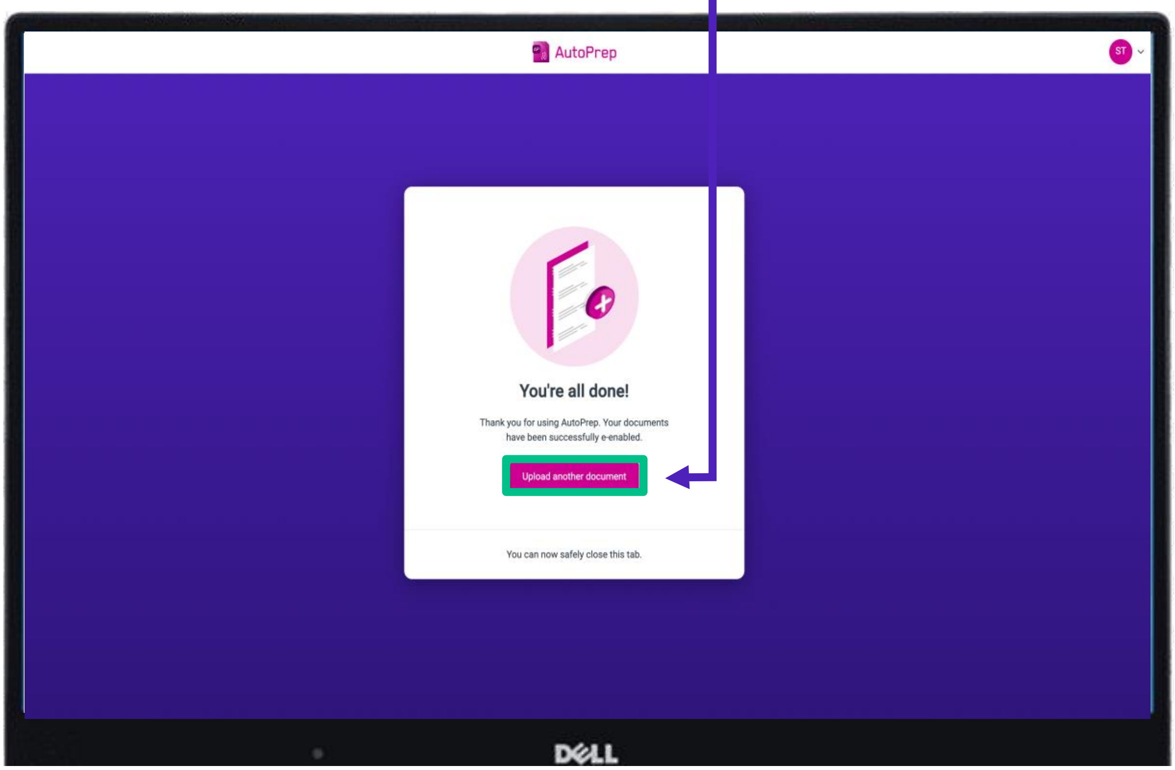
Click Done When Complete

When you're satisfied with the tags, click Done.



Confirmation

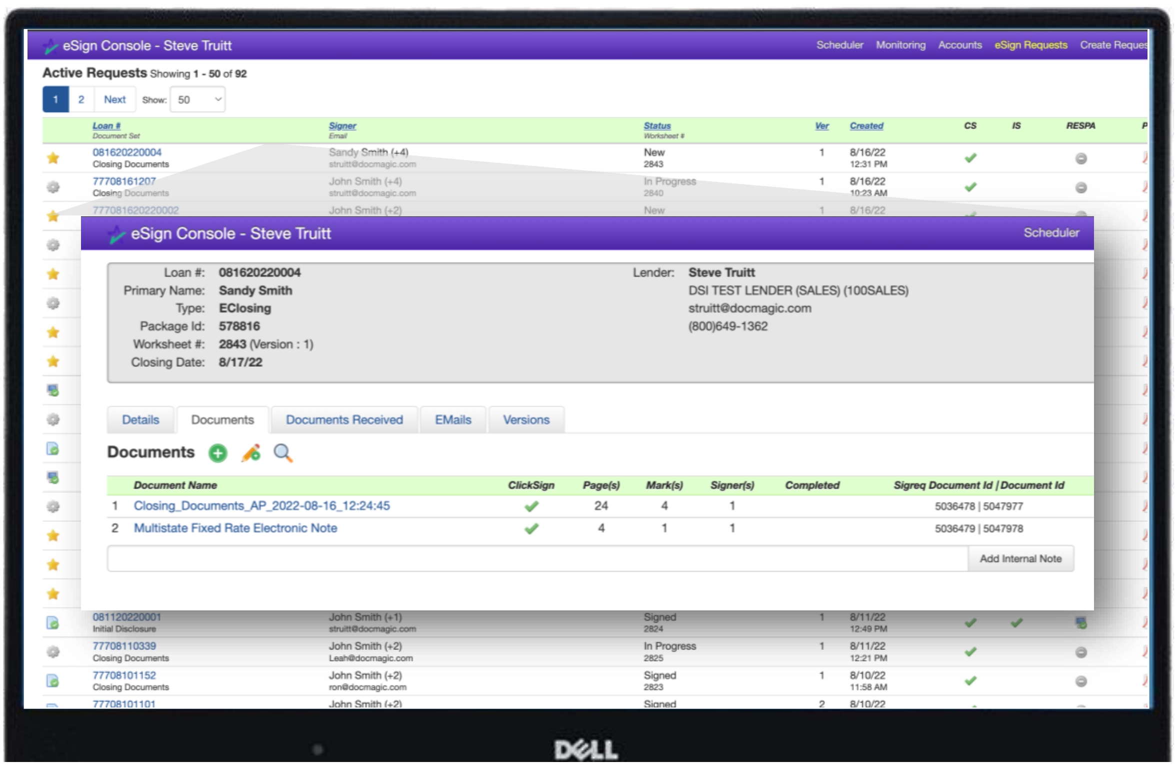
If you want to upload another document, click here. Otherwise, close the tab



AutoPrep™

eSign Console

The AutoPrep™ – prepared loan will now be listed in your eSign Console on your dashboard.

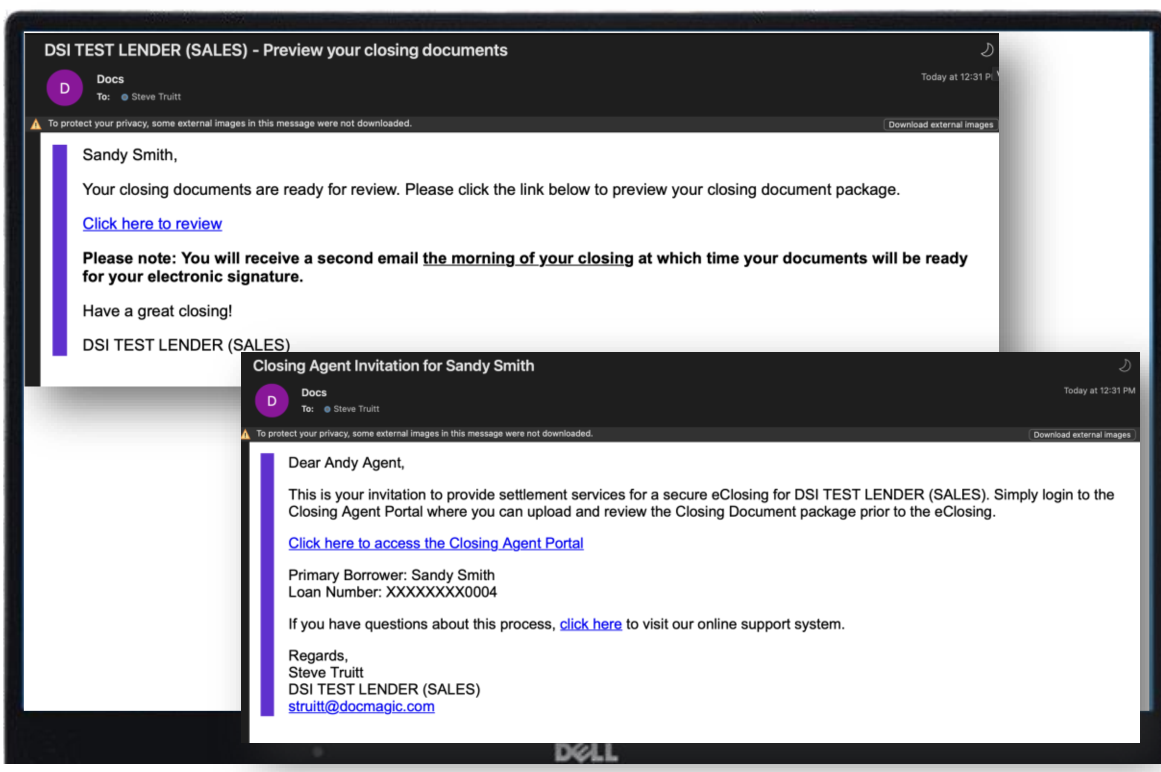


For additional information on how to use our eSign Console, please visit our Product Training Page.

AutoPrep™

Email Invites

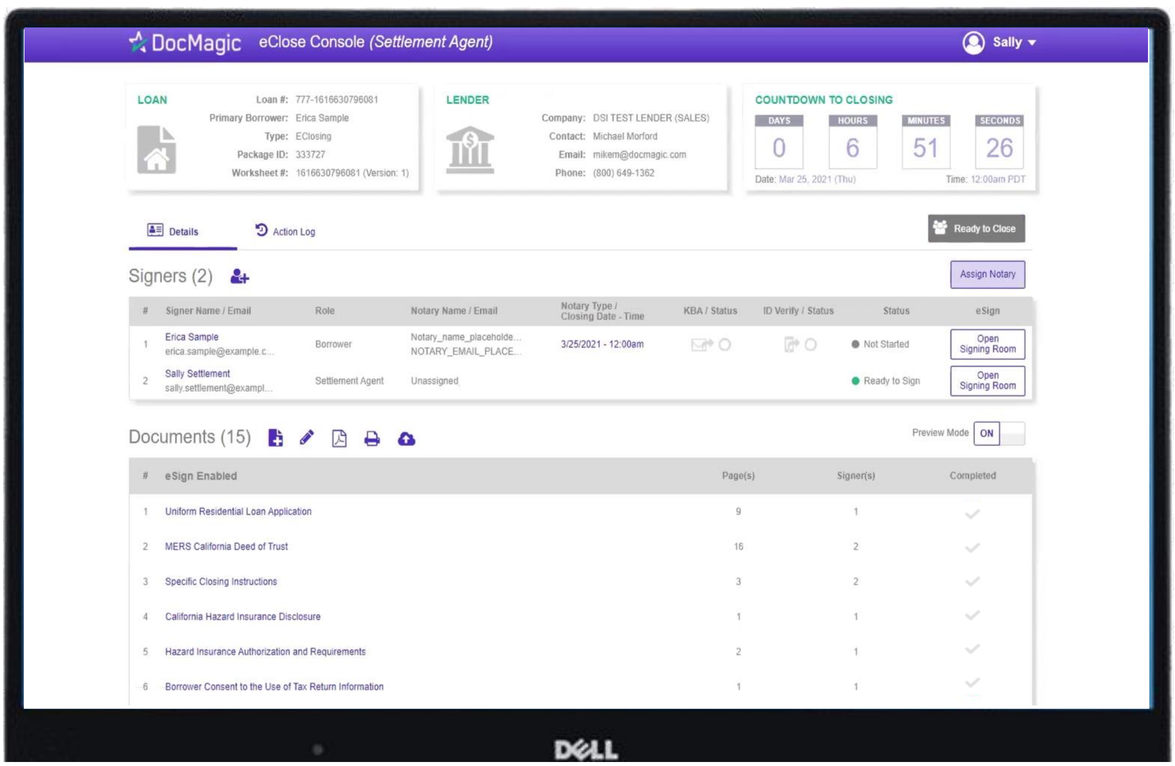
eSign email notifications will be sent to the participants, including the Settlement Agent and any additional signers.



AutoPrep™ – Settlement Agent

Settlement Agent

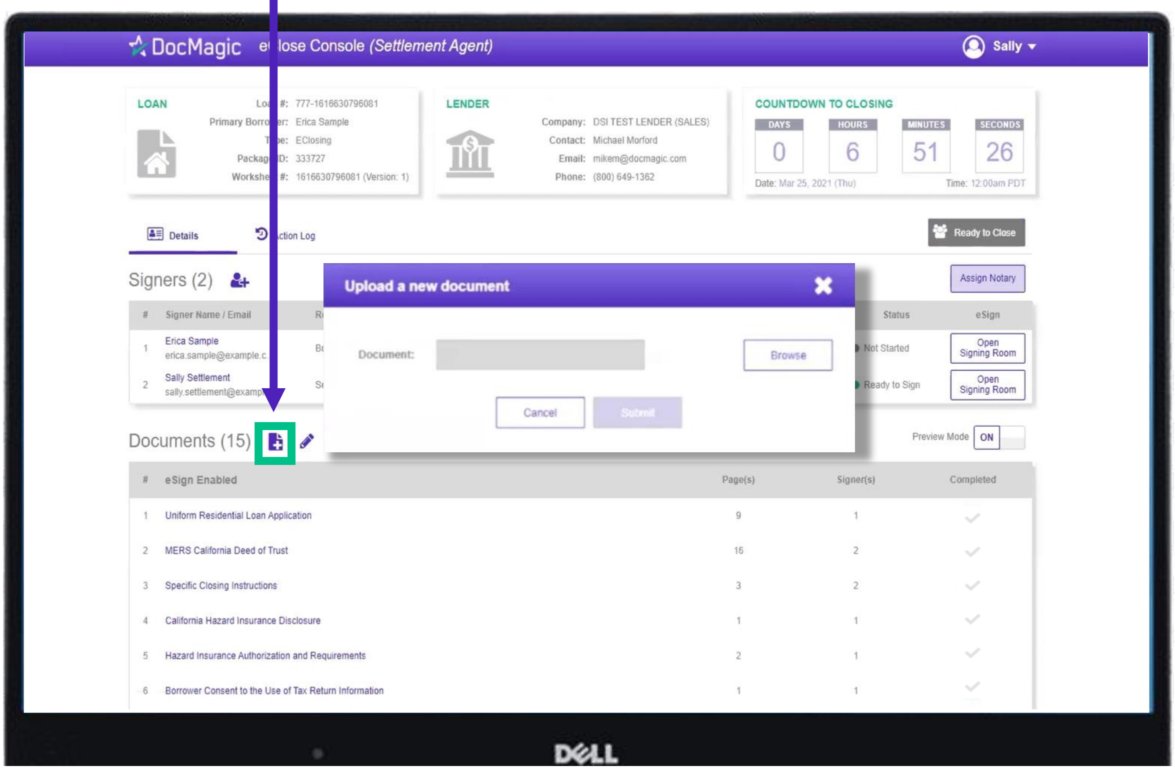
The rest of this guide will focus on using AutoPrep™ from the Settlement Agent portal. Many of the functions are the same as before.



For more information about the Settlement Agent Portal, please visit our Product Training Page.

Uploading a File

When you need to add a document to the stack that requires signatures, click on the page icon below to upload it.

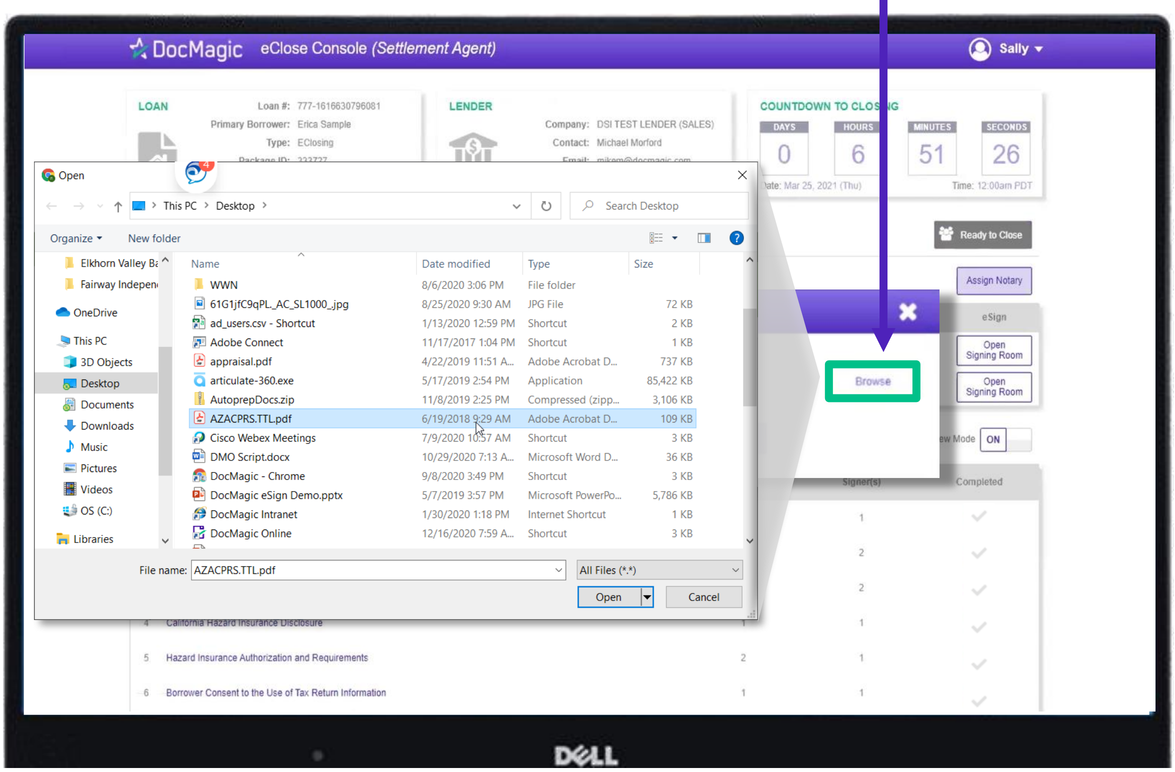


Any file you upload to the Documents section will automatically trigger AutoPrep™.

AutoPrep™ – Settlement Agent

Uploading a File

Click the Browse button to navigate to the document you would like to add to the package.



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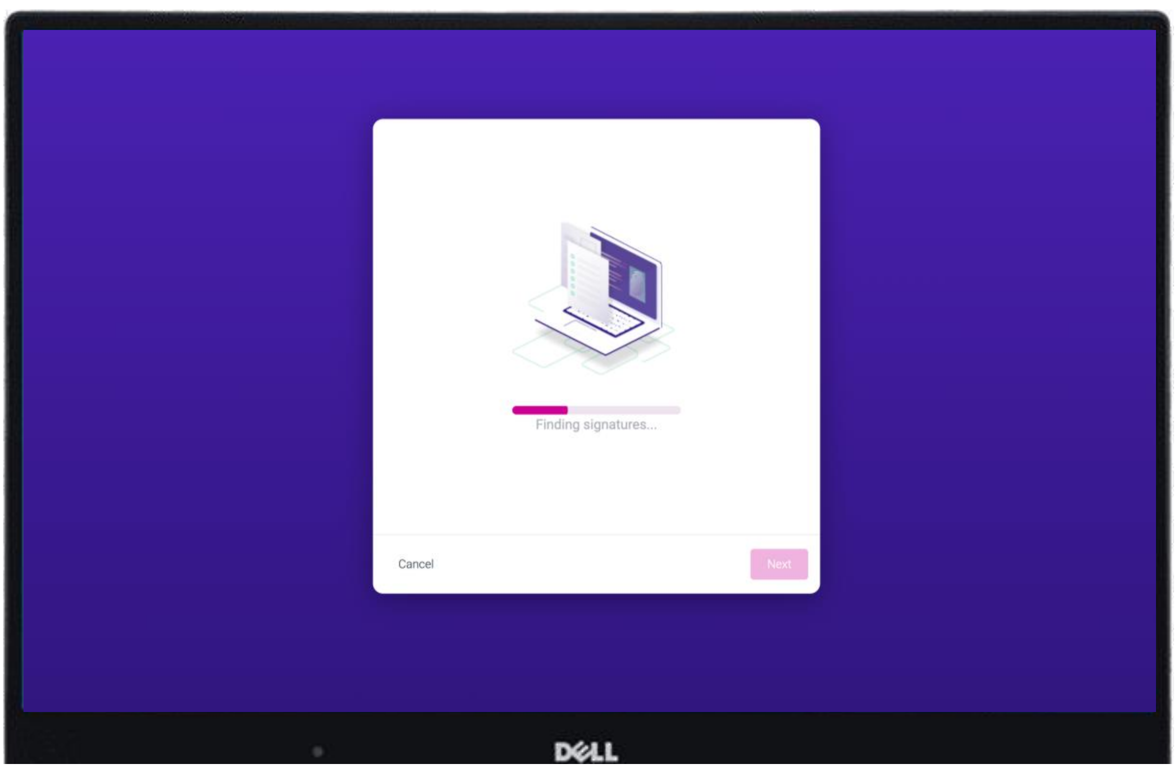

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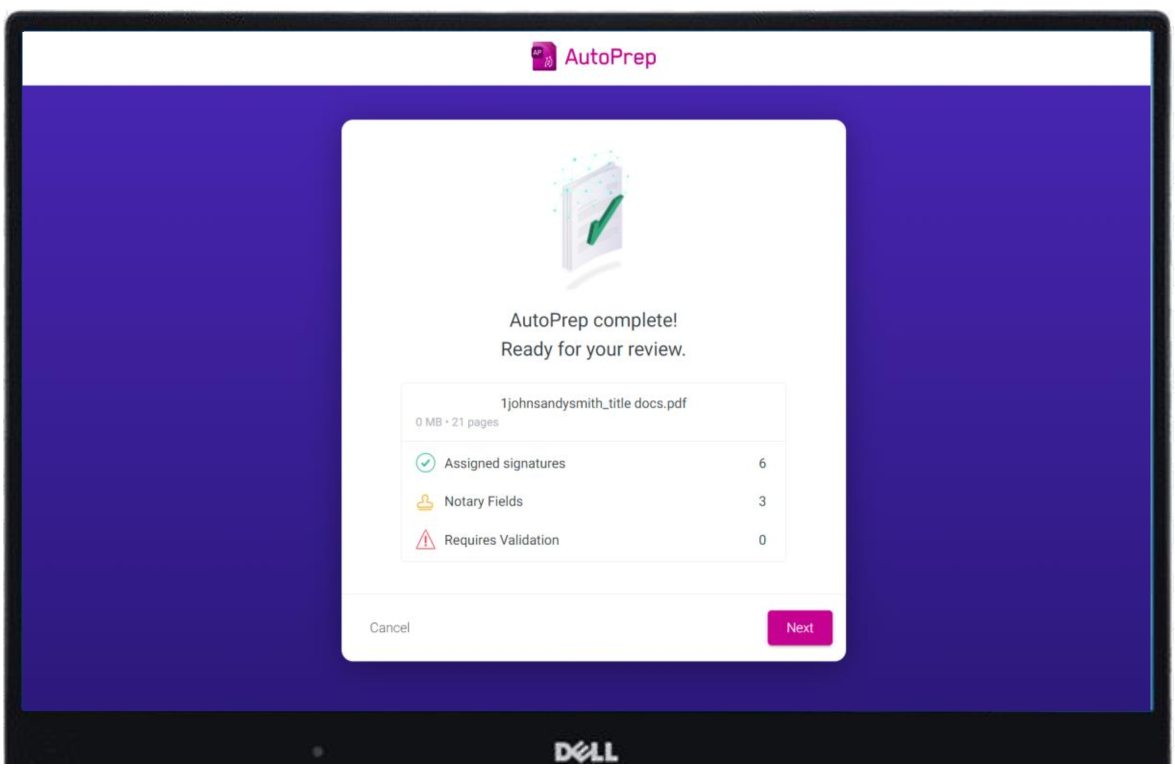

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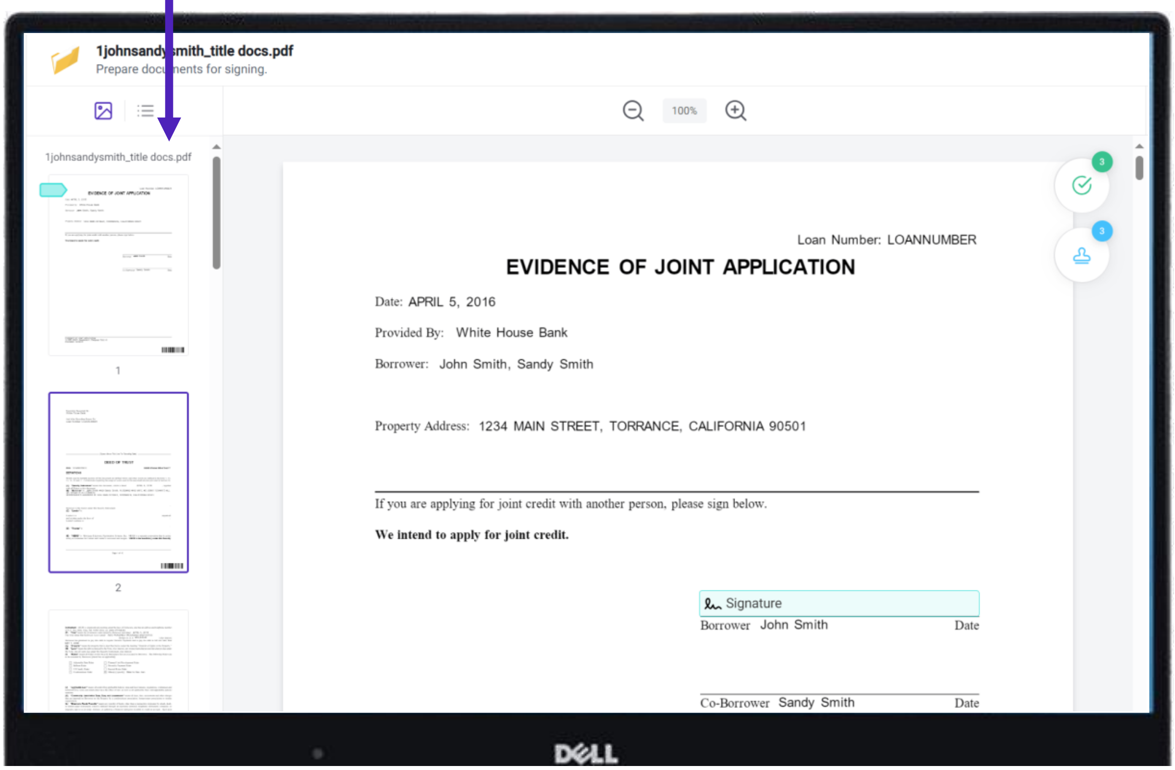

AutoPrep™ – Settlement Agent

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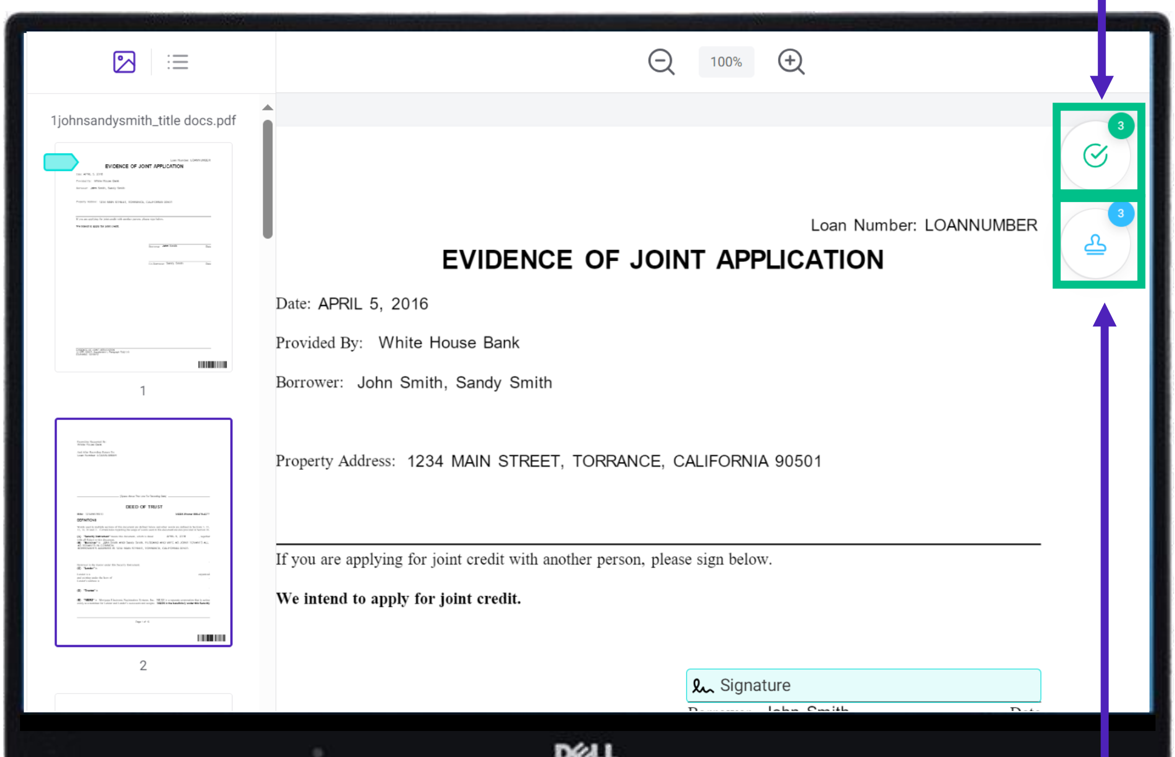

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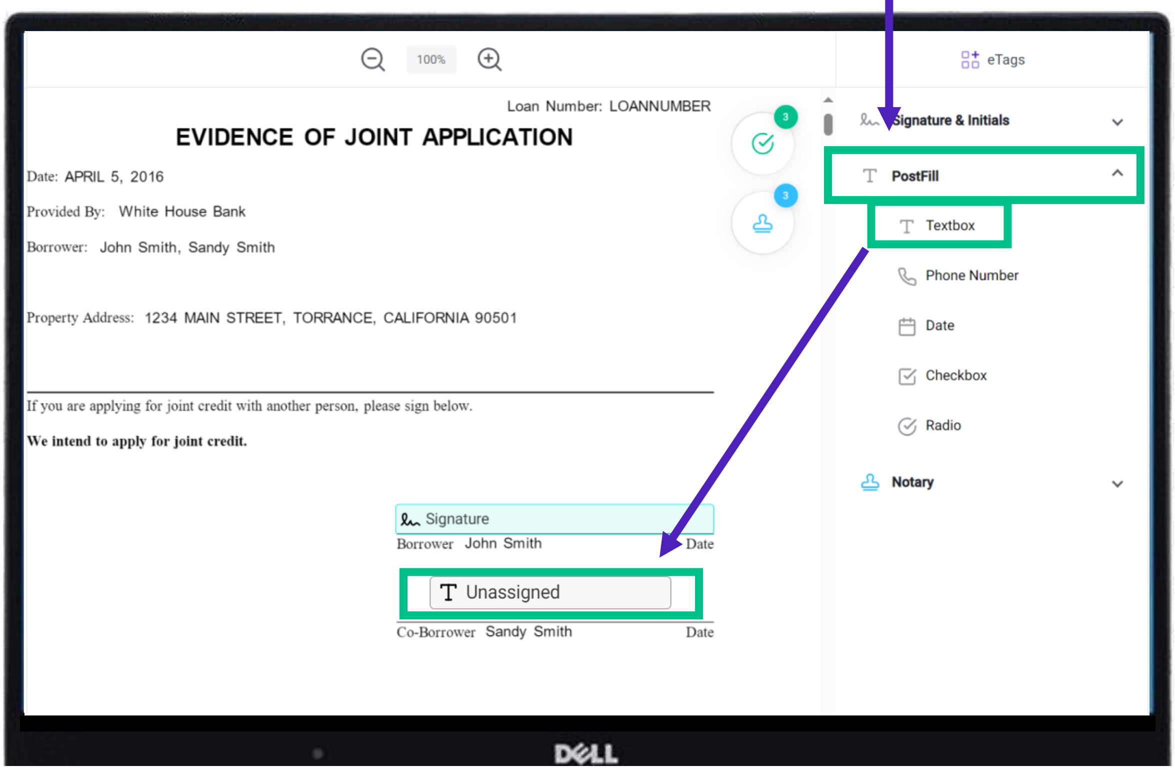

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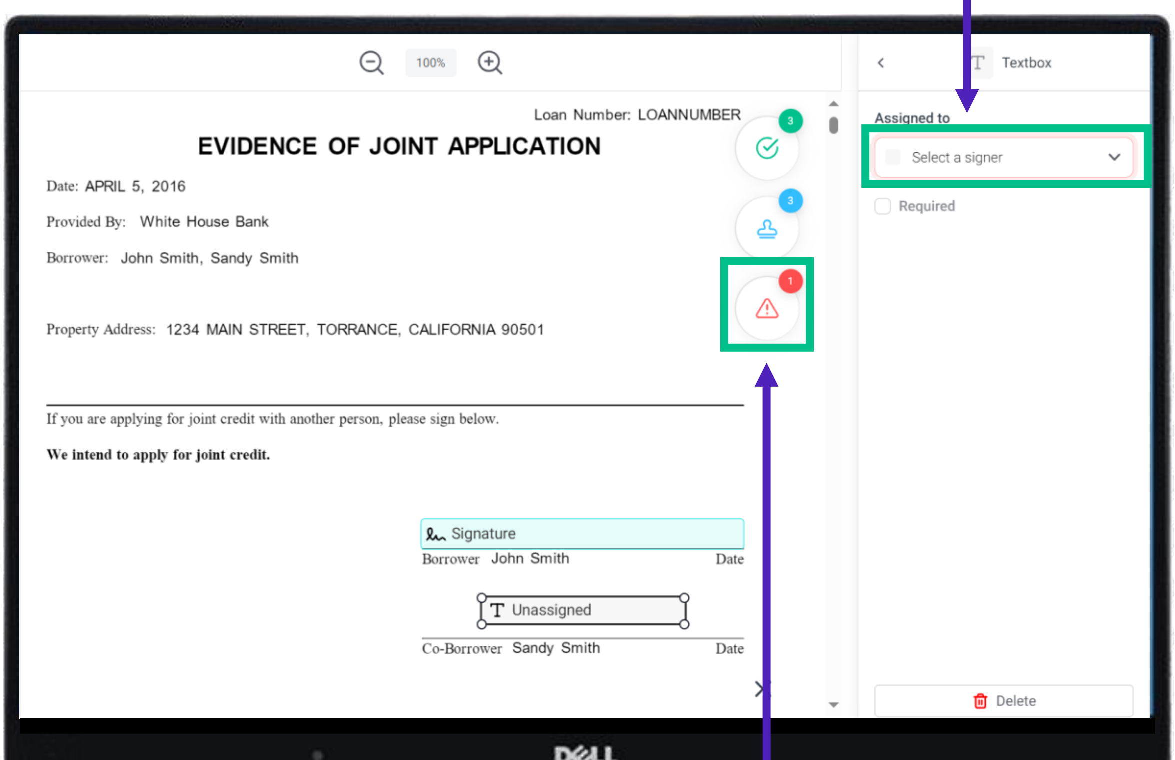

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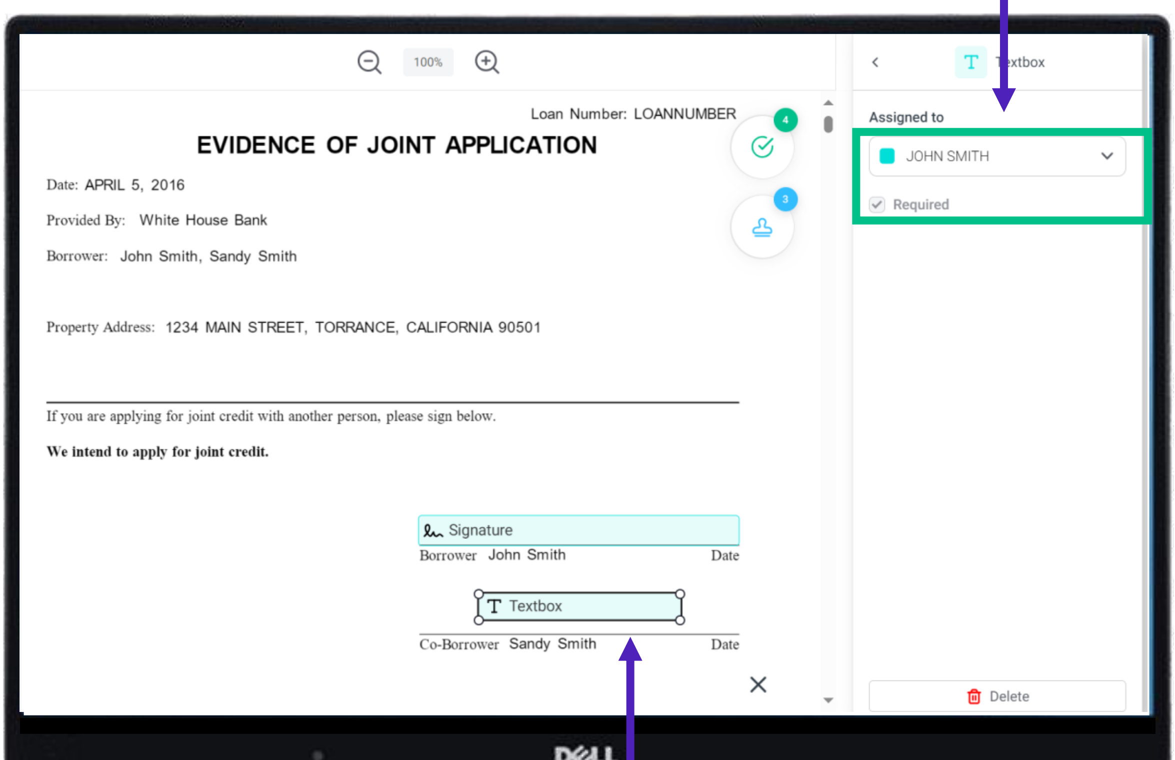

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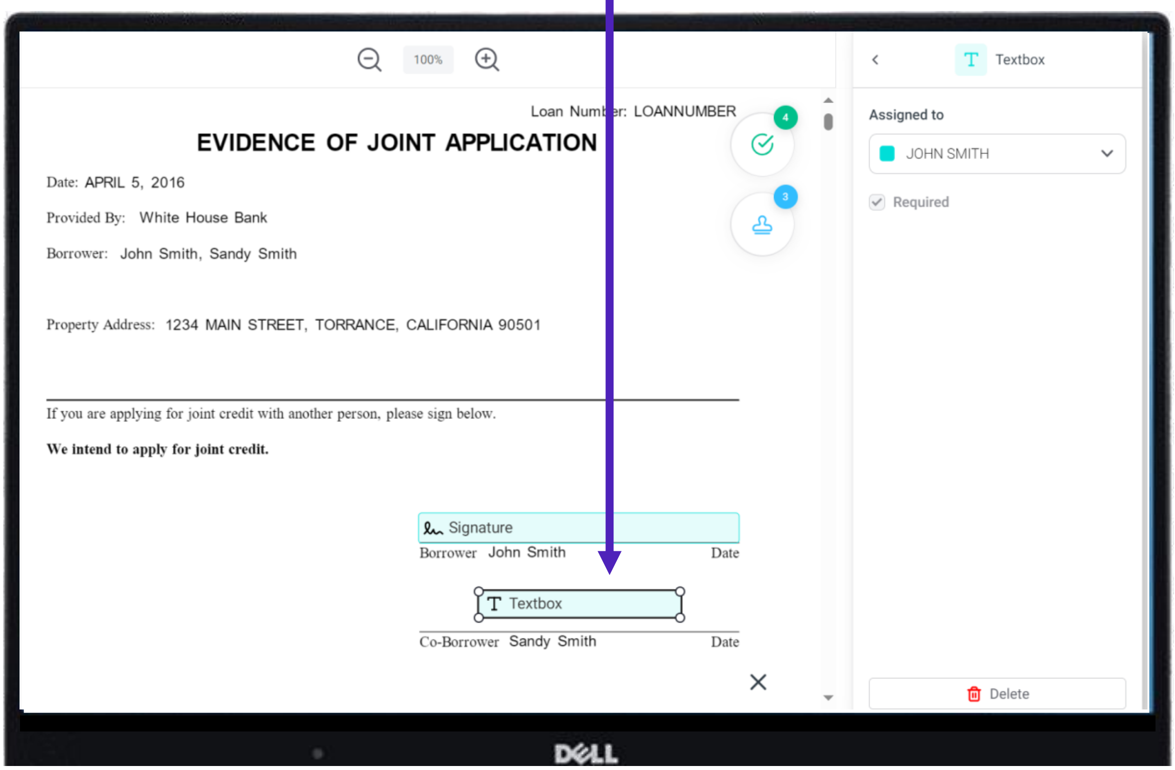

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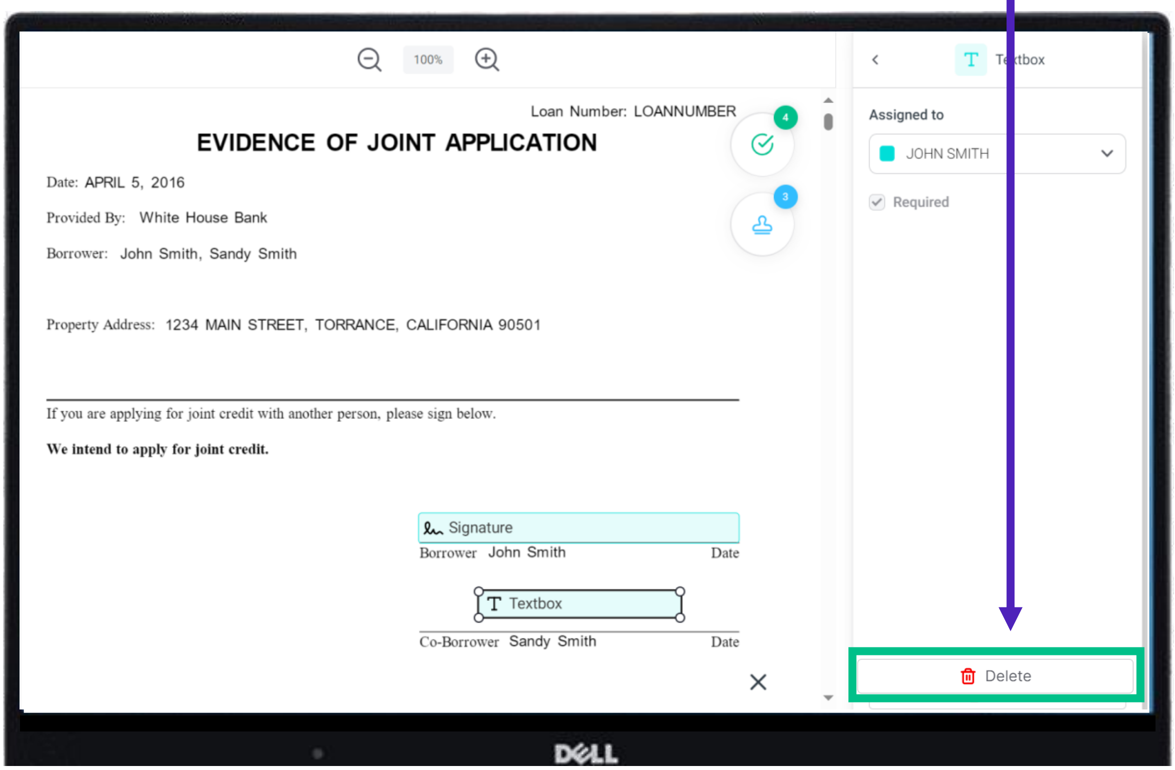

AutoPrep™ – Settlement Agent

Fill Before You Sign!

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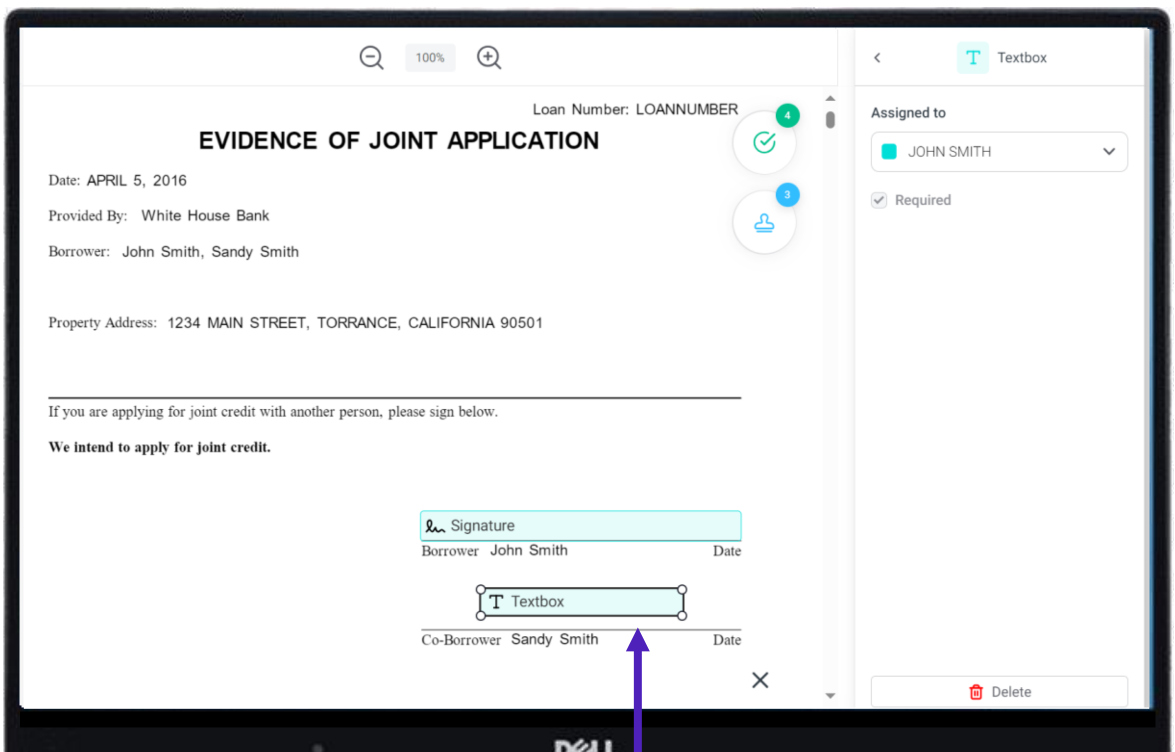

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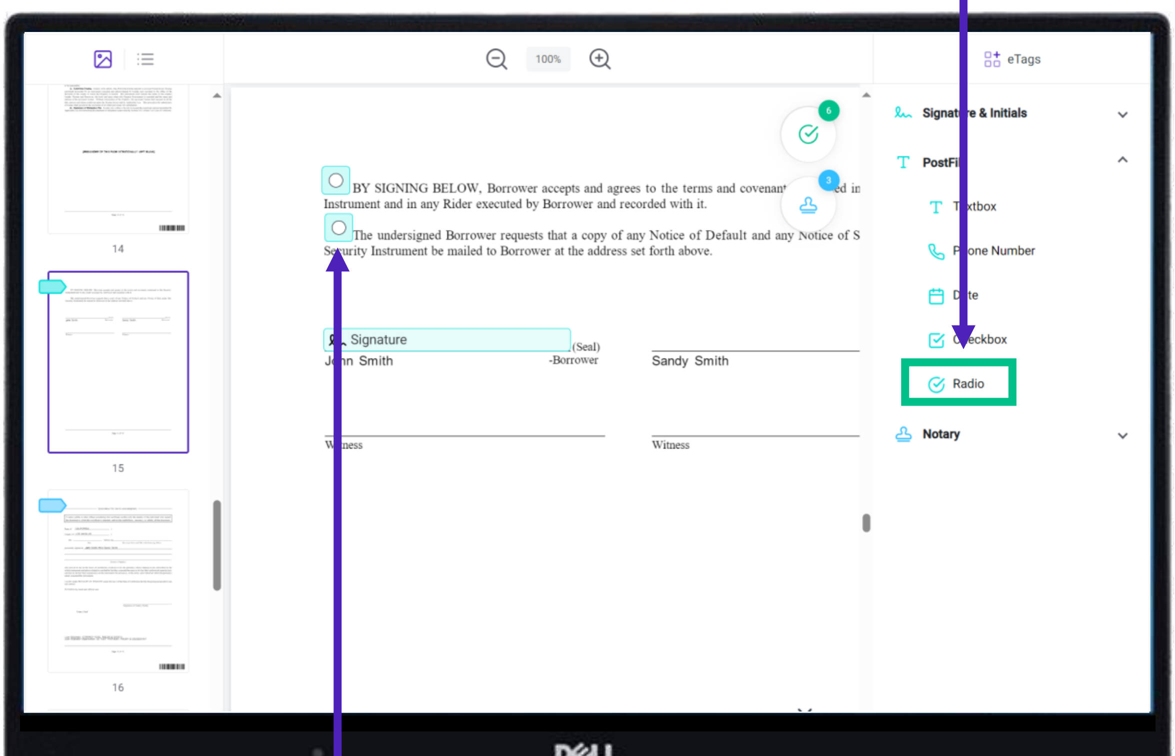

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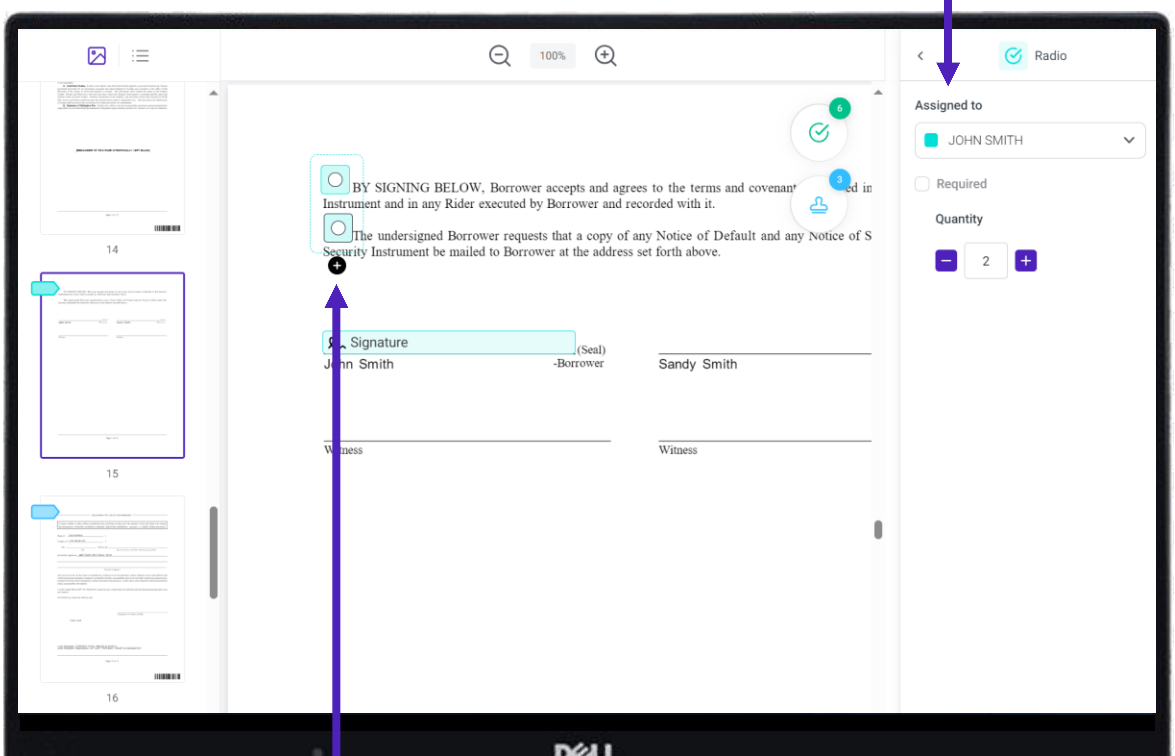

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AutoPrep™ – Settlement Agent

Notary Tags

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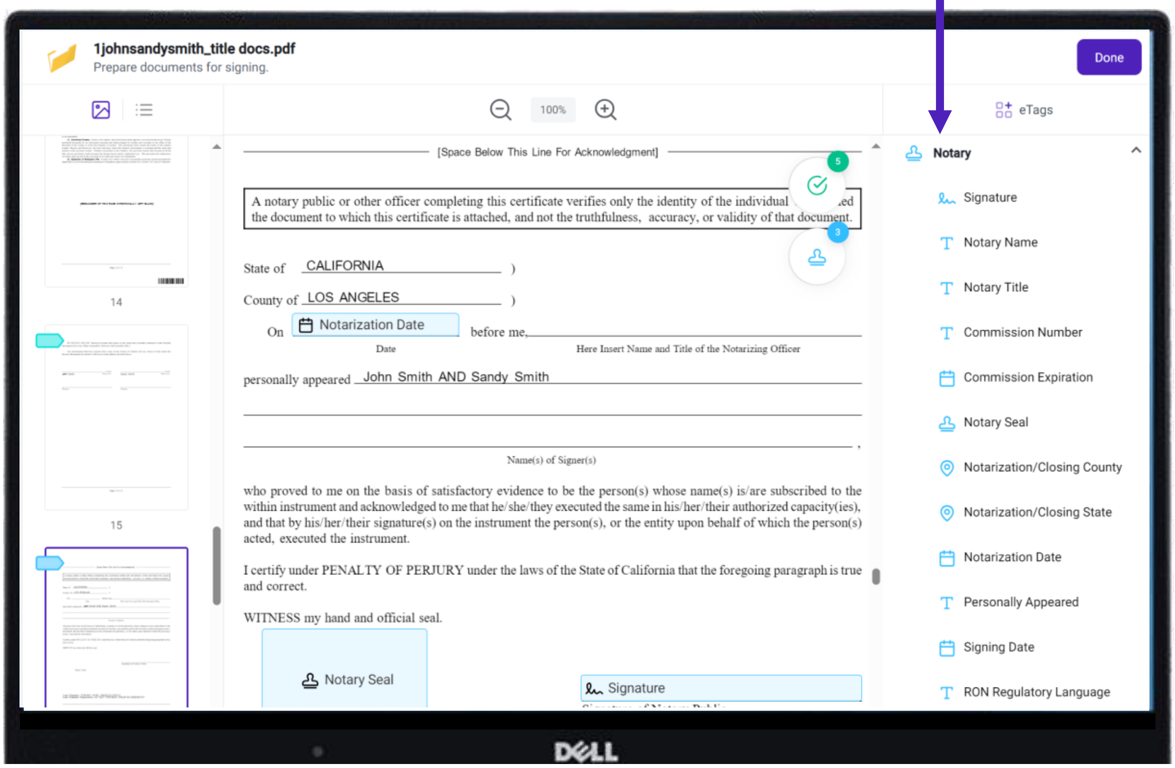

AutoPrep™ – Settlement Agent

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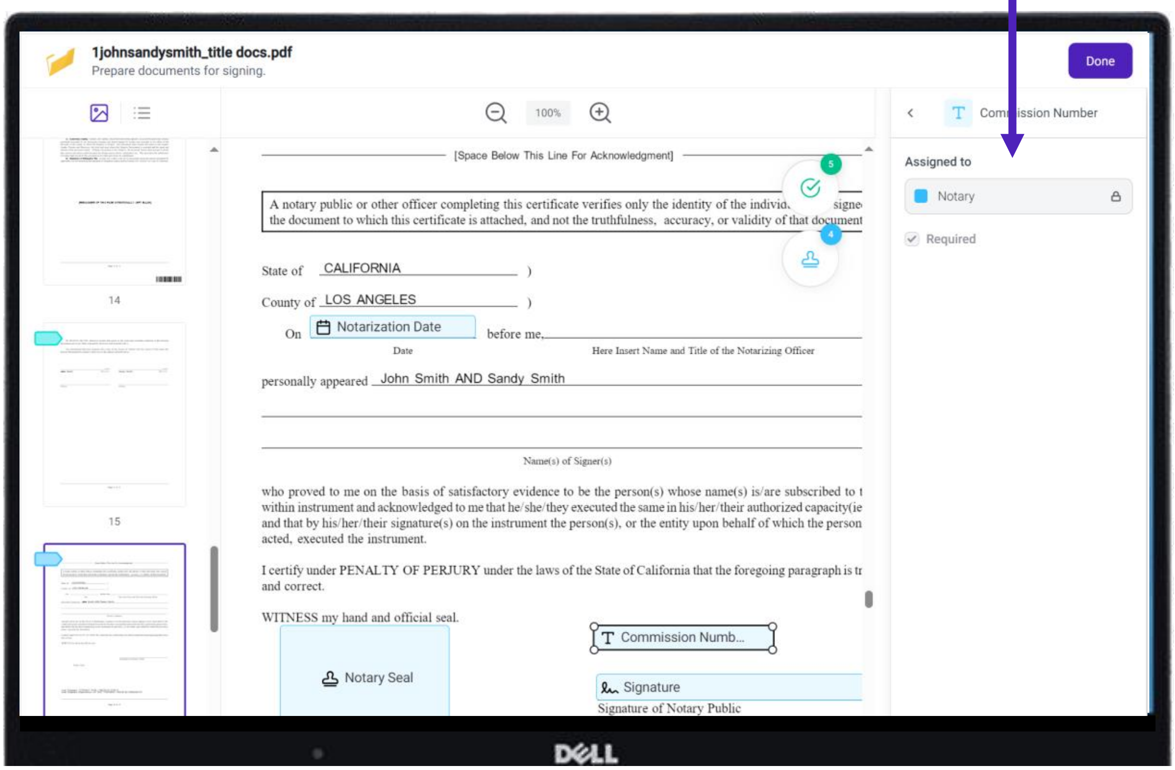
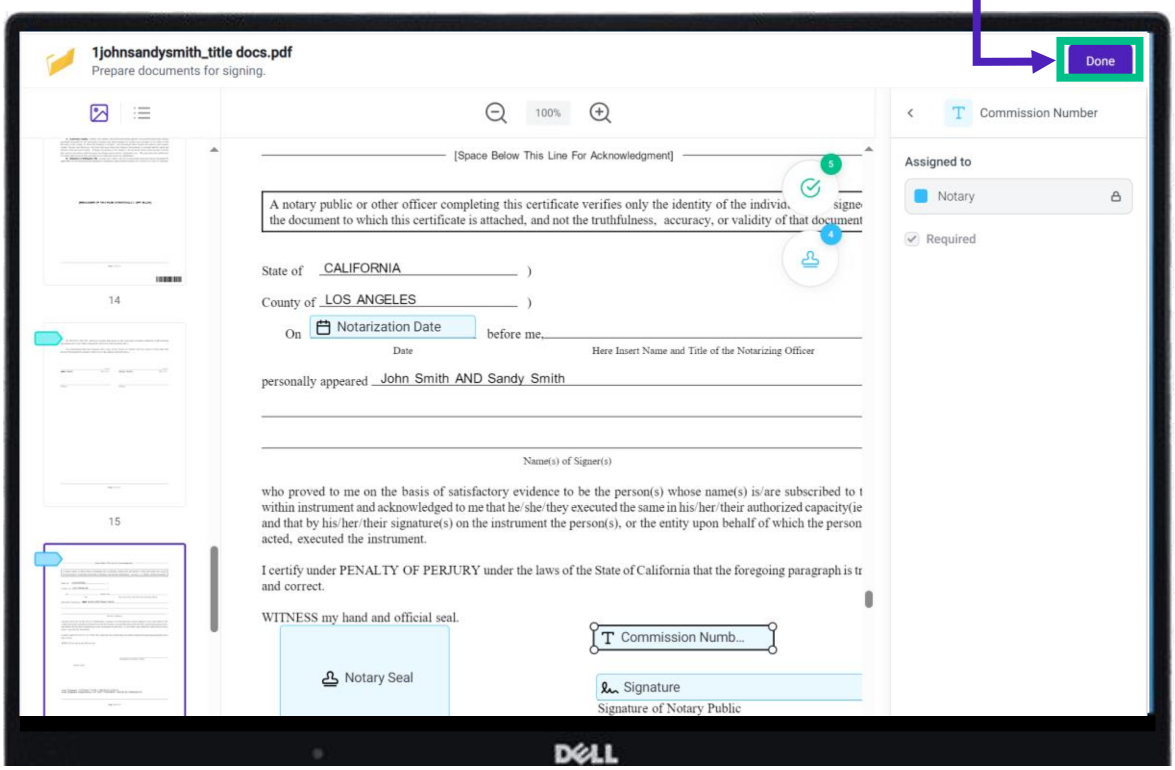


Similarly, if you grab a non-Notary tag, you won't be able to assign it to a Notary.

AutoPrep™ – Settlement Agent

Click Done When Complete

When you're satisfied with the tags, click Done.



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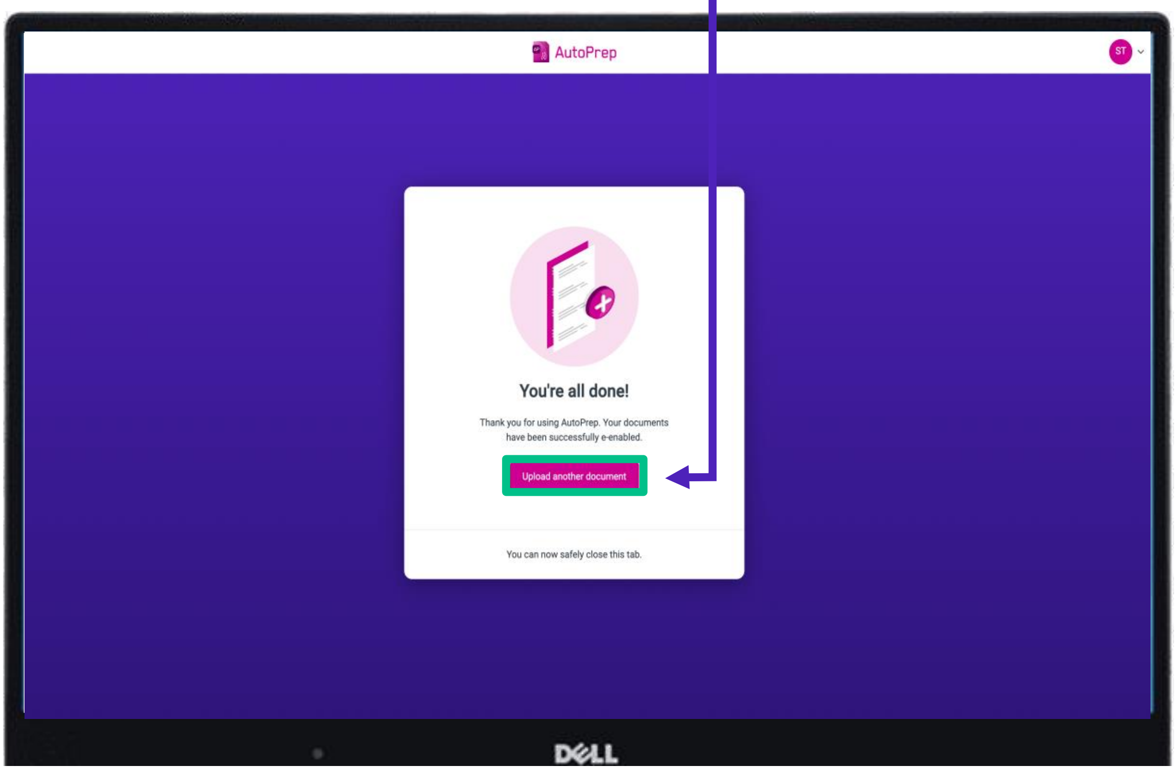
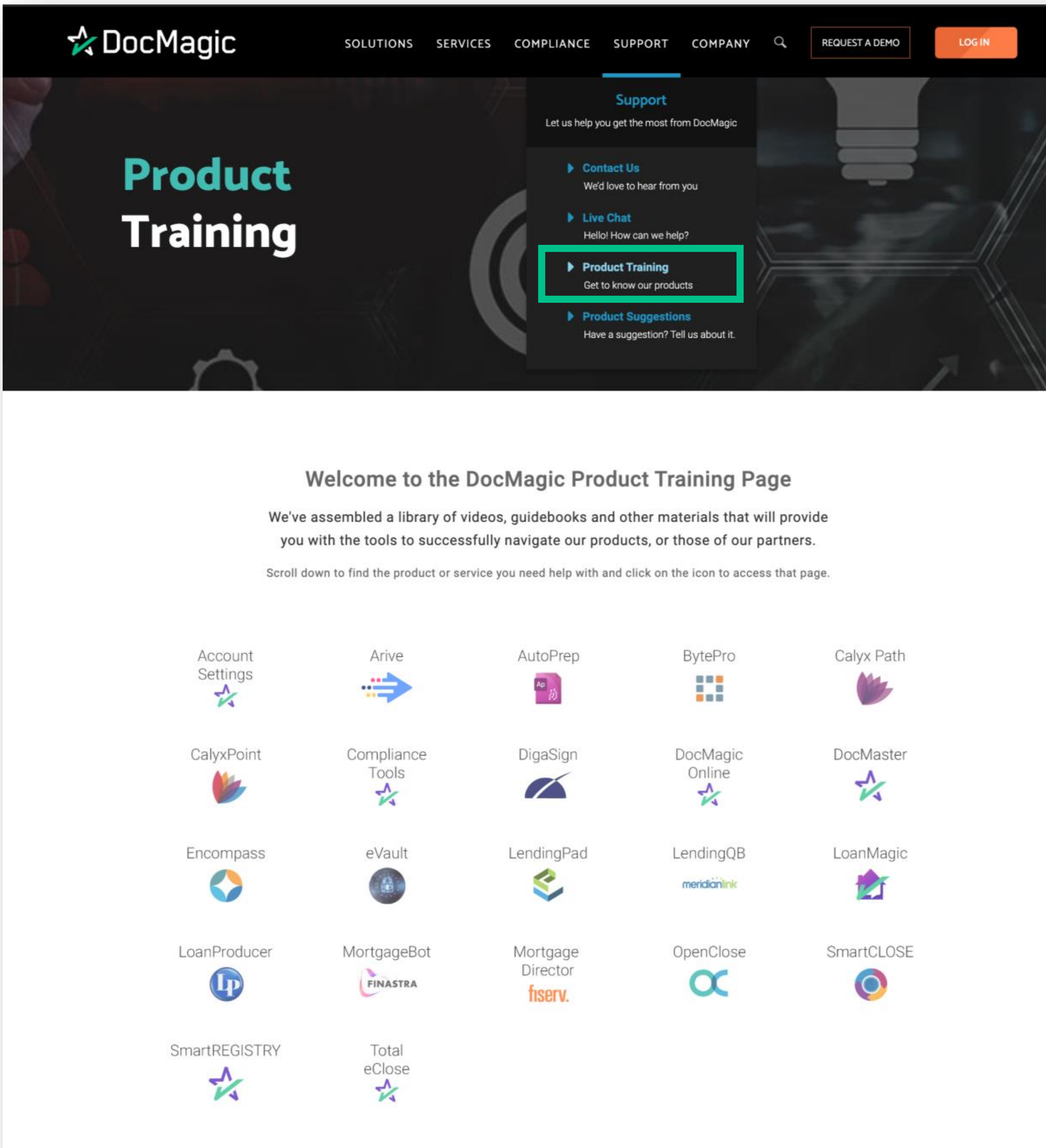


Additional Resources

Product Training Page



For additional training resources, please visit our Product Training Page on the DocMagic website.