



AutoPrep

The Complete Guide

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

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- ✓ No eNote Creation

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- ✓ Ensure proper e-tagging of documents

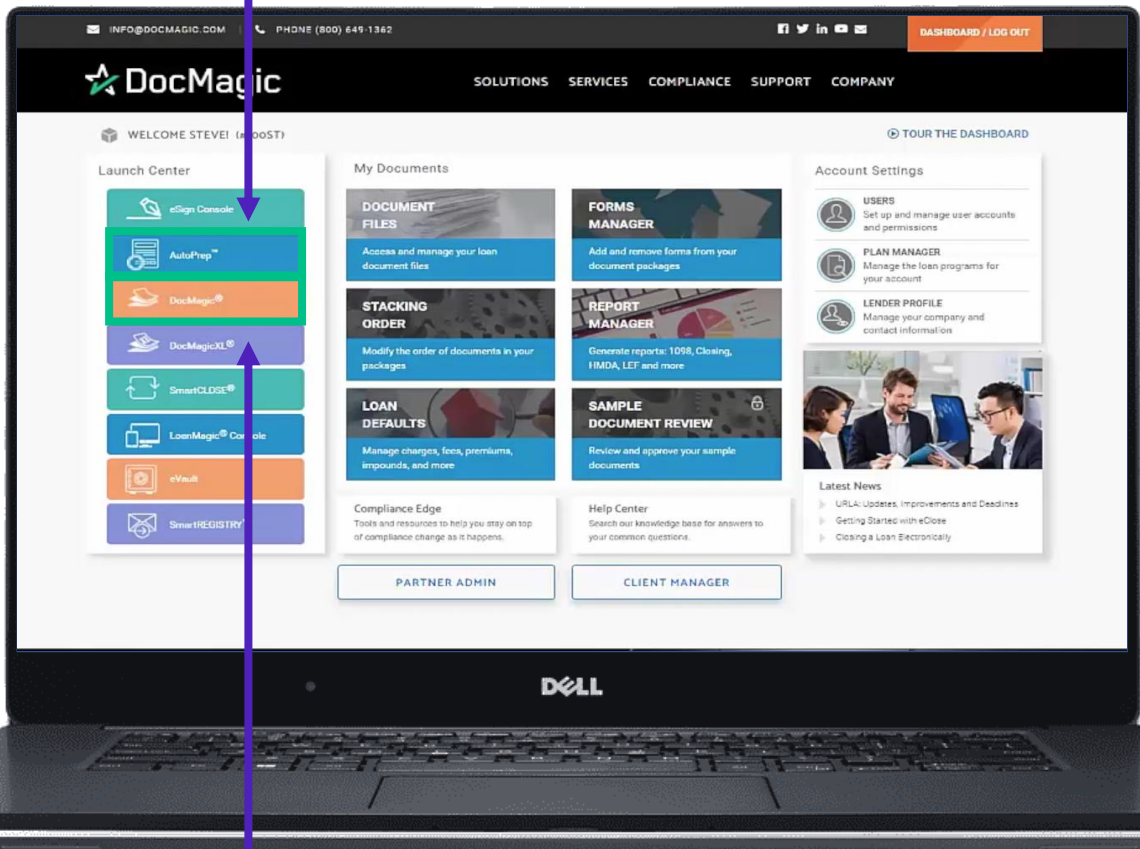
Determine which of these use cases suits you best and skip to that portion of the guide. Happy tagging!



AutoPrep

Getting Started

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 7 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.

DocMagic - Borrower One Sample (#35)

File Edit Services Tools Help

Open Save New Copy Import Default Audit

Data Capture

General Borrowers/Sellers Property Terms Prov

K. Due from Borrower at Closing

Code	Description
01	Sale Price of Property
02	Sales Price of Any Personal Property Include
03	Closing Costs Paid at Closing

L. Paid Already by or on Behalf of Borrower at Closing

Code	Description
01	Deposit
02	Loan Amount
03	Existing Loan(s) Assumed or Taken Subject

CALCULATION

Description	Amount
Total Due Already from Borrower at Closing (K)	\$250,000.00
Total Paid by or on Behalf of Borrower at Closing (L)	\$0.00
Cash to Close From/To Borrower	\$250,000.00

Document Processing Options

Worksheet #3132 (SMIT) is queued for processing.

General Options

Package Type: **Electronic Note**

File Format: ☐ Adobe PDF ☒ DBK (PCL)

Loan Application

FNMA 3.x File: Browse

Electronic Delivery

☐ DocMagic eSign

☐ eSignature enable

☐ eNotary enable ☐ Include SMARTDoc eNote

☐ Send to Mobile App

☐ Event Notification

☐ E-Mail Secure Link to

Security

☐ Require Password

☐ Retrieval Notification

☐ Disable Recipient Printing

Additional Services

☐ Print and Deliver Enter Delivery Information

☐ Flood Certification

☐ MERS Registration

Life of Loan? ☒ Yes ☐ No

Process **Cancel**

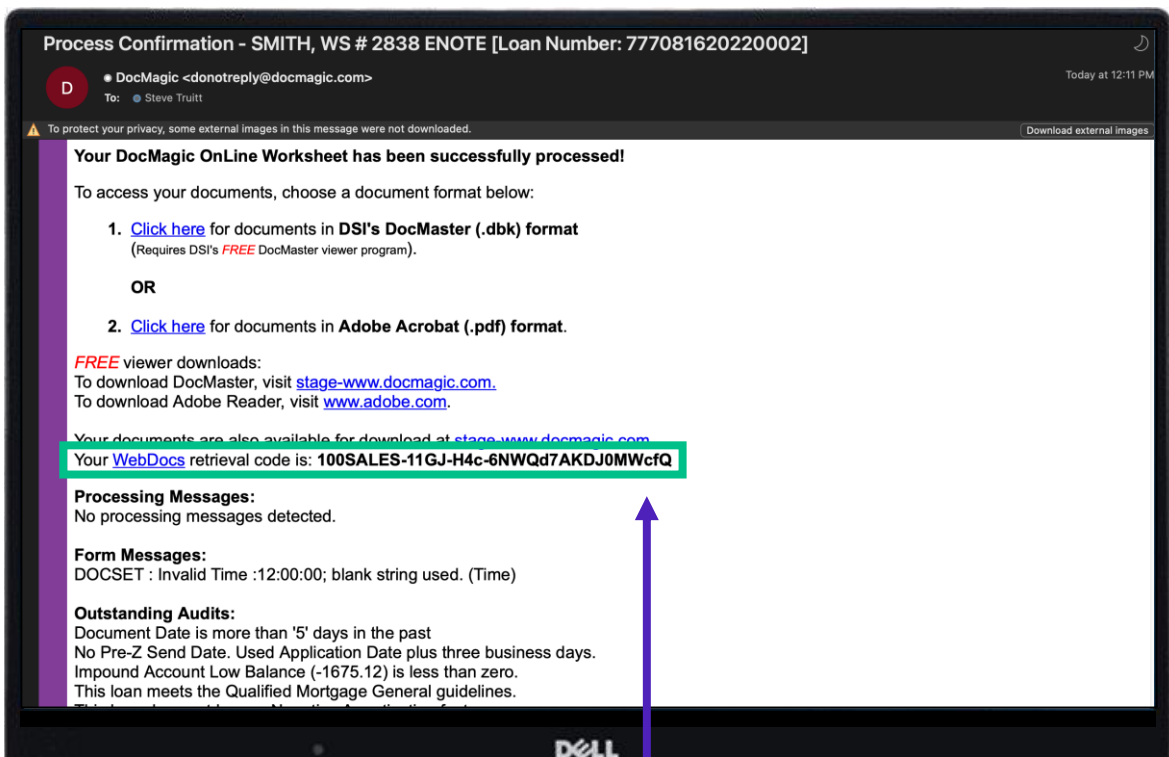
Not sure how we got here? Please check out our [DocMagic Online training section of the Product Training page](#).



AutoPrep - DocMagic Online

Grab The WebDocs Code

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



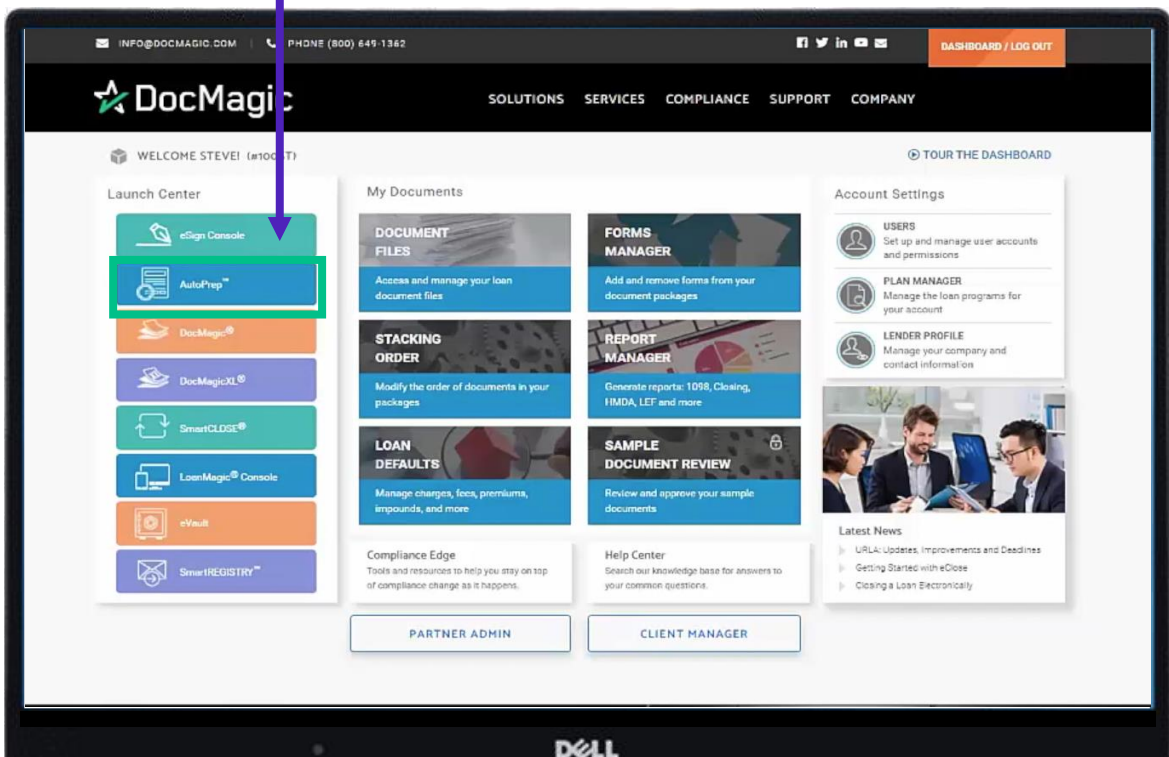
Copy this WebDocs retrieval code. You will need it when you upload documents to AutoPrep.



AutoPrep - DocMagic Online

Start AutoPrep

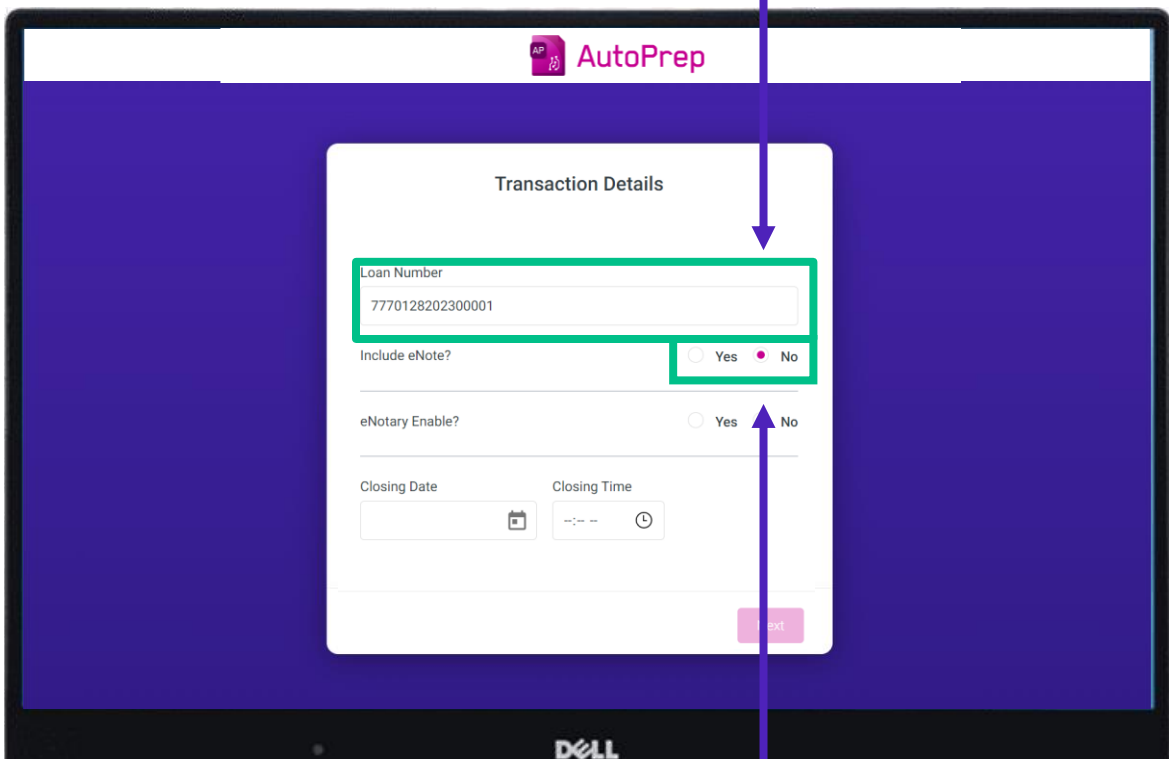
Go to the dashboard and choose AutoPrep from the Launch Center.



AutoPrep

Transaction Details

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



The screenshot shows a Dell monitor displaying the AutoPrep web application. The page has a dark blue background. At the top center, there is a white box titled "Transaction Details". Inside this box, the "Loan Number" field is highlighted with a green border and contains the text "7770128202300001". Below this, the "Include eNote?" section has two radio buttons: "Yes" (unselected) and "No" (selected). The "eNotary Enable?" section also has two radio buttons: "Yes" (unselected) and "No" (selected). At the bottom of the form, there are fields for "Closing Date" and "Closing Time", each with a calendar icon. A pink "Next" button is located at the bottom right of the form. A purple arrow points from the text box above to the "Loan Number" field, and another purple arrow points from the text box below to the "No" radio button in the "Include eNote?" section.

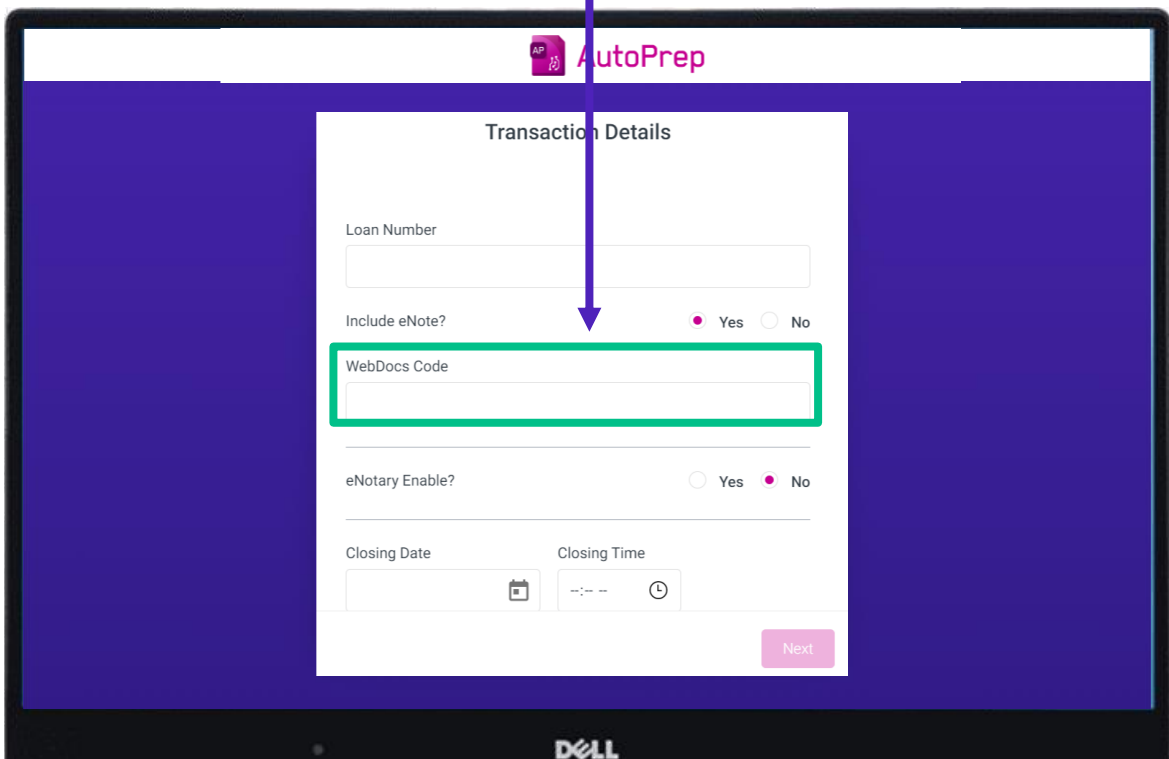
Select the radio button to indicate whether you will include an eNote or not.



AutoPrep

eNote WebDocs Code

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



The screenshot shows the 'AutoPrep' logo at the top of a form titled 'Transaction Details'. The form is displayed on a Dell monitor. The fields and options are as follows:

- Loan Number: [Text Input Field]
- Include eNote?: ☒ Yes ☐ No
- WebDocs Code: [Text Input Field] (highlighted with a green box)
- eNotary Enable?: ☐ Yes ☒ No
- Closing Date: [Calendar Icon]
- Closing Time: [Time Picker Icon]
- Next: [Pink Button]

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



AutoPrep

Transaction Details

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

The screenshot shows the 'Transaction Details' form in the AutoPrep application. The form is displayed on a Dell monitor. The fields and their values are as follows:

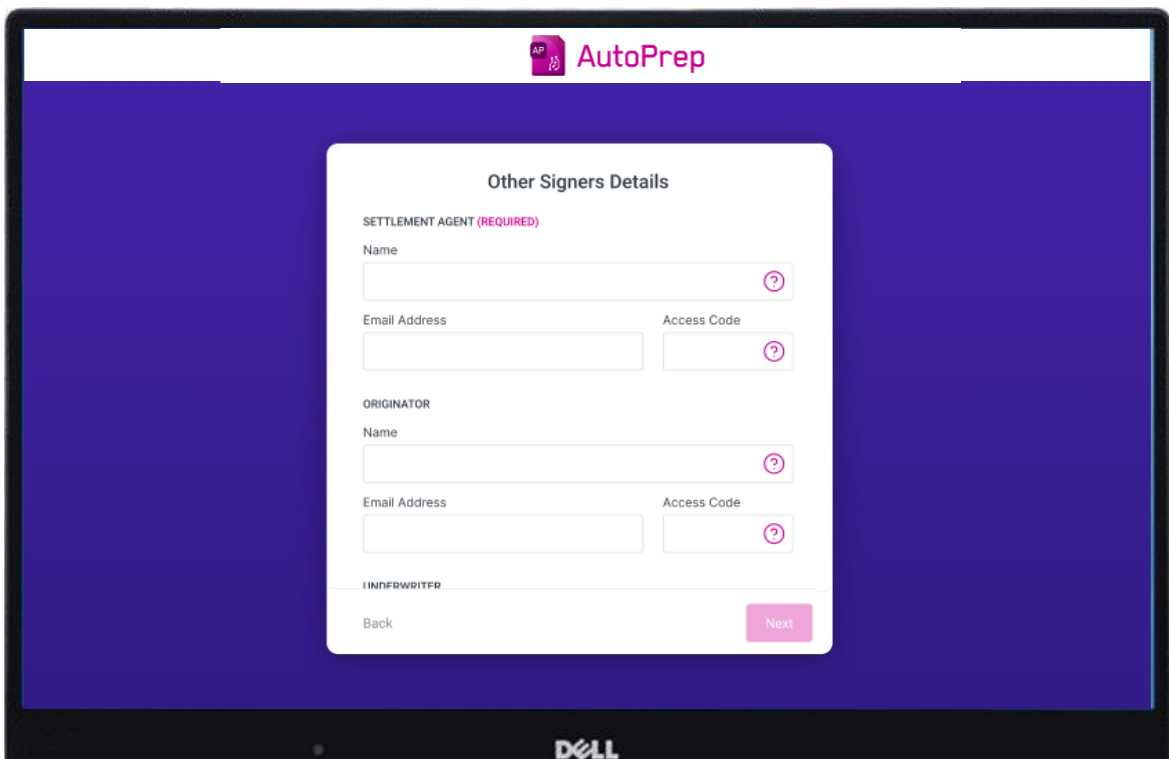
- Loan Number:** 7770128202300001
- Include eNote?:** ☐ Yes ☒ No
- eNotary Enable?:** ☒ Yes ☐ No
- Closing Date:** 1/19/2023
- Closing Time:** 09:00 AM
- Next button:** A pink button with the text 'Next'.

A green rectangular box highlights the 'eNotary Enable?' field and the 'Next' button. A purple arrow points from the text box above to the 'eNotary Enable?' field, and another purple arrow points from the 'Next' button to the text box below.

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



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



The screenshot shows a Dell monitor displaying the AutoPrep web application. The page title is "Other Signers Details". It contains three sections for data entry, each with a "Name" and "Email Address" field, and an "Access Code" field. The first section is for the "SETTLEMENT AGENT (REQUIRED)". The second section is for the "ORIGINATOR". The third section is for the "UNDERWRITER". Each field has a red question mark icon to its right. At the bottom of the form, there are "Back" and "Next" buttons. The Dell logo is visible at the bottom of the monitor frame.

Other Signers Details

SETTLEMENT AGENT (REQUIRED)

Name ?

Email Address Access Code ?

ORIGINATOR

Name ?

Email Address Access Code ?

UNDERWRITER

Back

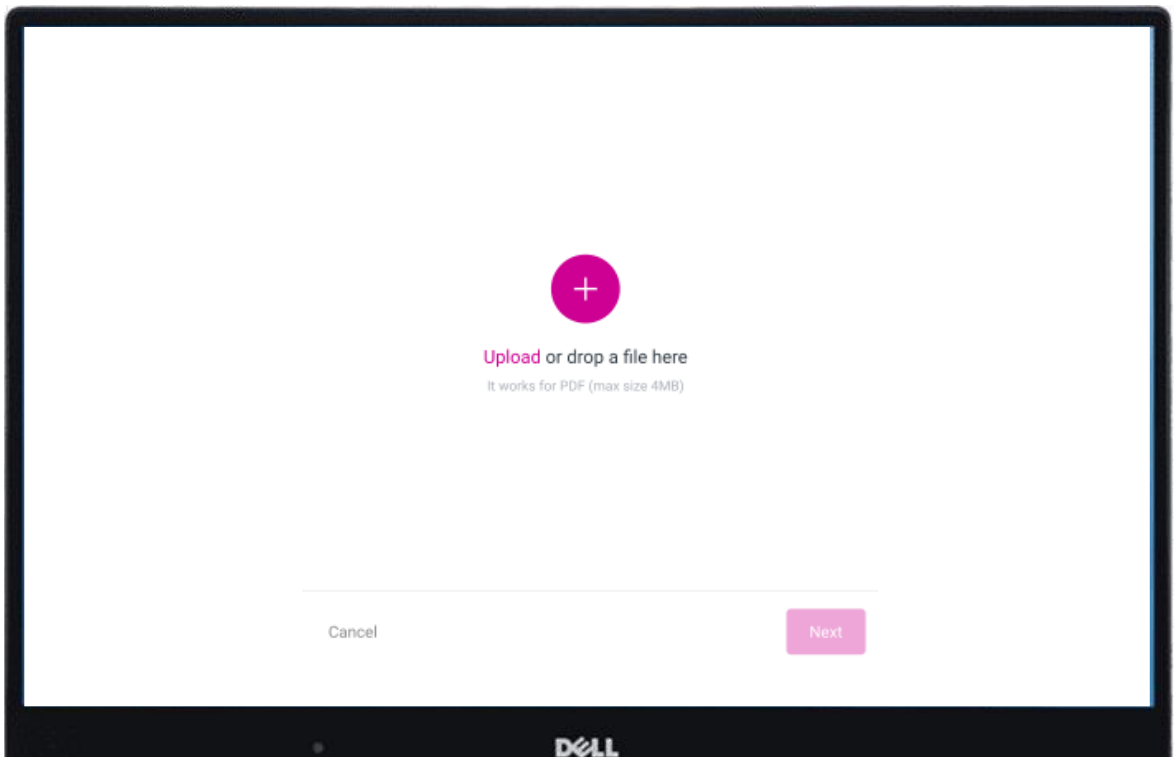
Borrower information needs to be entered EXACTLY as it appears in the document.



AutoPrep

Uploading a File

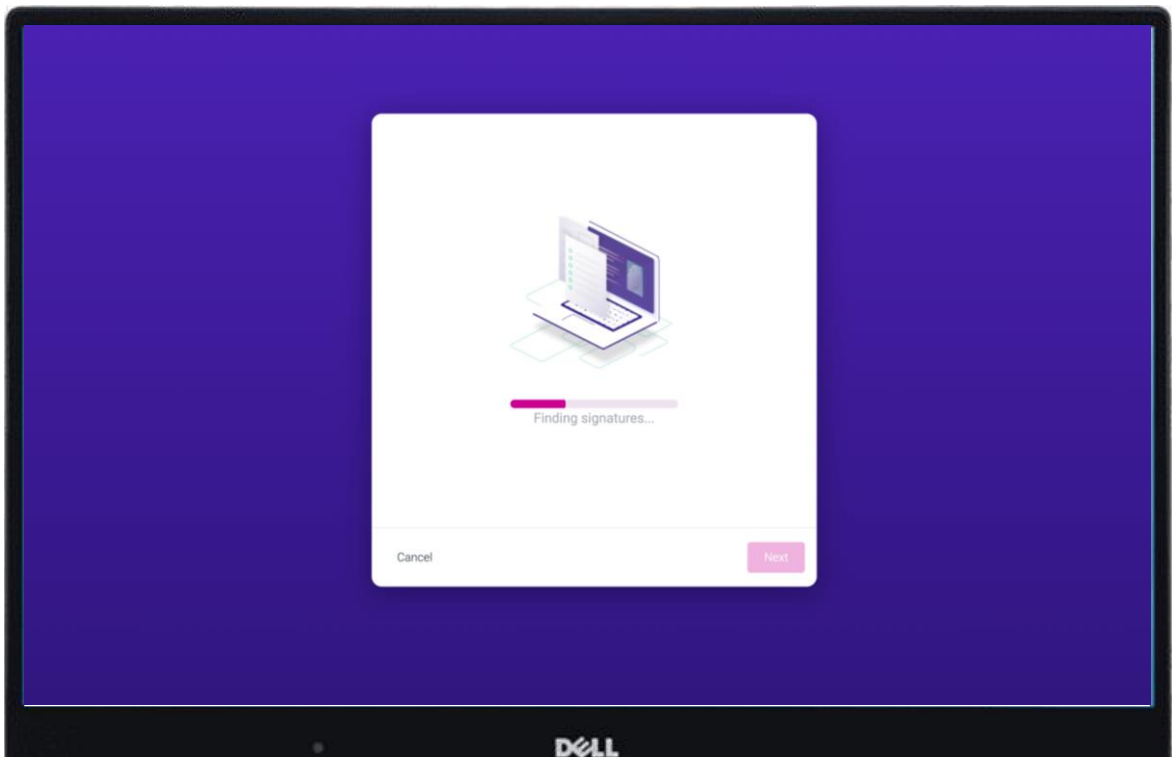
Upload a PDF that you wish to prepare.



AutoPrep

AutoPrep = (Doc)MAGIC

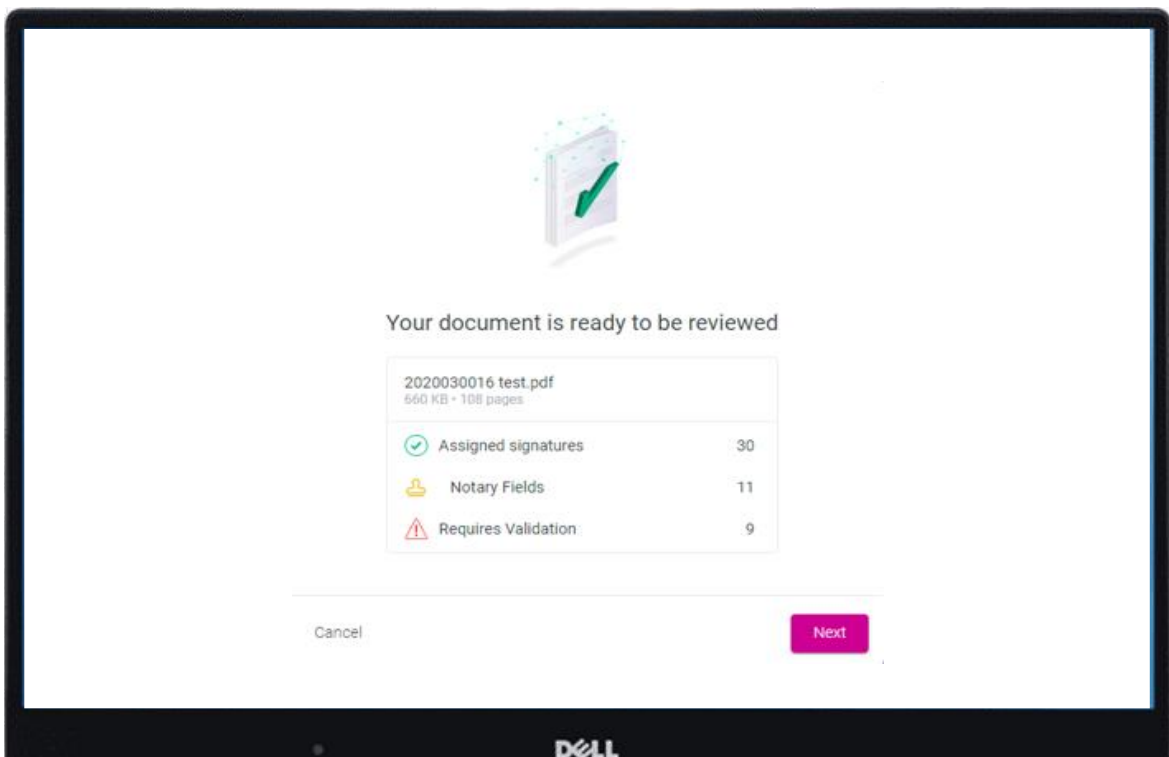
AutoPrep will use Optical Character Recognition (OCR) and A.I. to identify signatures lines for Borrowers and other participants including Notaries.



AutoPrep

Document Pre-Review

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



AutoPrep

Green and Red

Green means that the signature line has been identified to match a previously entered borrower/signer

The screenshot shows a Dell monitor displaying the AutoPrep interface. At the top, the document title is "samsandysmith_closing package_hw annual.pdf" and it is "page 2 of 24". The form is titled "EVIDENCE OF JOINT APPLICATION" and includes fields for "Date: APRIL 5, 2016", "Provided By: White House Bank", "Borrower: Sam Smith, Sandy Smith", and "Property Address: 1234 MAIN STREET, TORRANCE, CALIFORNIA 90501". Below this, a section for joint credit application is shown with a "Select signer" dropdown menu. The dropdown is open, showing "Borrower Sam Smith" and "Sandy Smith (Borrower 1)" as options. The "Sandy Smith (Borrower 1)" option is highlighted with a green checkmark icon. To the right of the form, there are two circular status indicators: a green one with a checkmark and a red one with a warning triangle. A blue arrow points from the text box above to the green indicator, and another blue arrow points from the text box below to the red indicator.

Red means that AutoPrep has found a signature line, but not a signer

Red fields **MUST** be verified before sending the document to proceed with eSign



AutoPrep

Green and Blue

The borrower will be highlighted in green.

The screenshot displays a DocMagic document titled "2020030016 test.pdf". The document contains a loan agreement form. A green callout points to a dropdown menu labeled "Terry M Mackey (Borrower 1)" which is highlighted in green. Below this, the text "- BORROWER - Terry M Mackey - DATE -" is visible. Further down, there are fields for "State of" and "County of". A blue callout points to a dropdown menu labeled "Notary" which is highlighted in blue. Below this, the text "Notary Public" and "My Commission Expires:" are visible. The Dell logo is at the bottom of the screen.

Blue indicates a field that needs to be filled out via text/signature.



AutoPrep

Extra Signatures, Postfill, Notary, etc.

Here is the toolbox. Blank fields can be populated with signature lines, initials, checkboxes, dates, and notary texts.

The screenshot displays the AutoPrep software interface. At the top, the title 'AutoPrep' is visible. Below it, the document title 'samsandysmith_closing package_hw annual.pdf' and 'page 2 of 24' are shown. The main content area displays the document 'EVIDENCE OF JOINT APPLICATION' with the following details:

- Loan Number: LOANNUMBER
- Date: APRIL 5, 2016
- Provided By: White House Bank
- Borrower: Sam Smith, Sandy Smith
- Property Address: 1234 MAIN STREET, TORRANCE, CALIFORNIA 90501

Below the document content, there is a section for signatures. It includes a dropdown menu for 'Borrower' (Sandy Smith) and a 'Date' field. Below that, there is a dropdown menu for 'Co-Borrower' (Sandy Smith) and another 'Date' field. A green plus sign icon is located at the bottom right of the document area, indicating where a user can click to add new fields.

On the right side of the interface, there is a 'Done' button and a 'Toolbox' menu. The 'Toolbox' menu is expanded, showing three options: 'Signature Fields', 'Notary Fields', and 'PostFill'. A green arrow points from the text box above to the 'Toolbox' menu.

A user can fill out blank fields by clicking the plus.



AutoPrep

Extra Signatures, Postfill, Notary, etc.

Click Done when complete.

The screenshot displays the AutoPrep software interface. At the top, the 'AutoPrep' logo is visible. Below it, the document title 'samsandysmith_closing package_hw annual.pdf' and 'page 2 of 24' are shown. The main content area is titled 'EVIDENCE OF JOINT APPLICATION' and includes the following information:

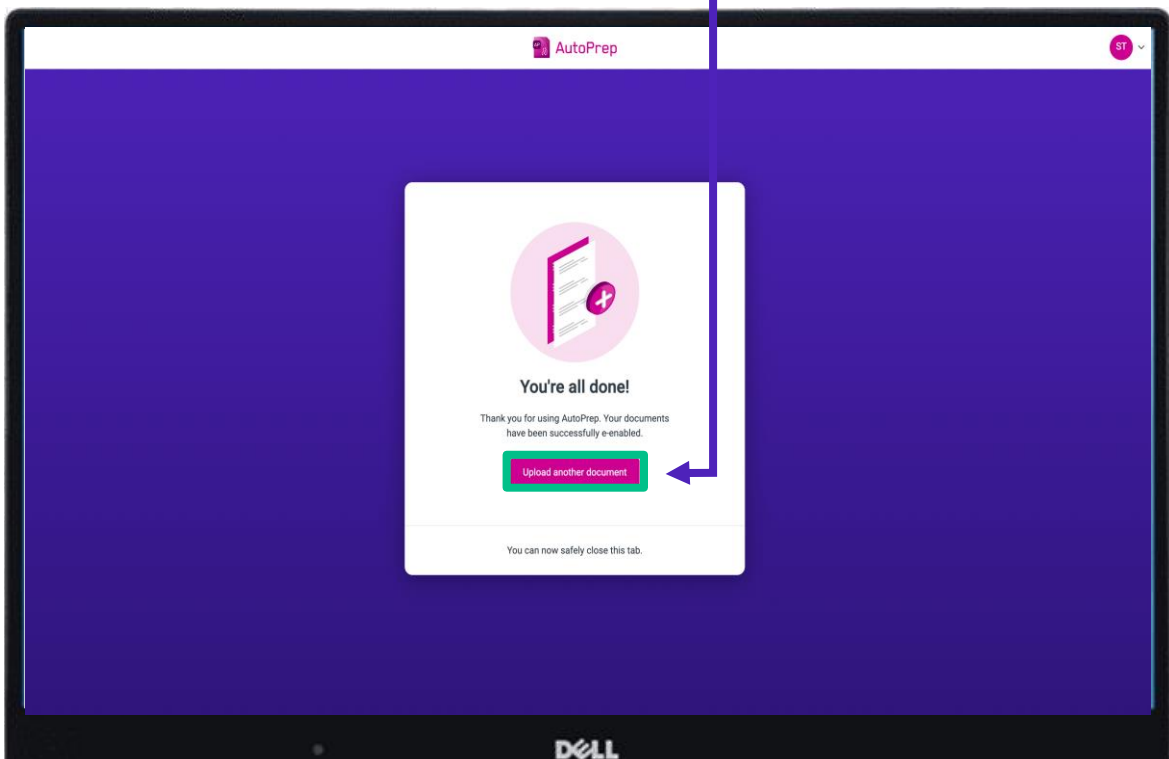
- Loan Number: LOANNUMBER
- Date: APRIL 5, 2016
- Provided By: White House Bank
- Borrower: Sam Smith, Sandy Smith
- Property Address: 1234 MAIN STREET, TORRANCE, CALIFORNIA 90501

Below this information, there is a section for signatures. It includes a dropdown menu for 'Borrower' (currently set to 'Sandy Smith (Borrower 1)') and a 'Co-Borrower' field (currently set to 'Sandy Smith'). There are also fields for 'Date' for both the Borrower and Co-Borrower.

On the right side of the interface, there is a sidebar with a 'Done' button at the top. Below it, there are sections for 'Signature Fields', 'Notary Fields', and 'PostFill'. A green arrow points from the text 'Click Done when complete.' to the 'Done' button.



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



This confirmation lets you know you can now work from your eSign console. For additional information on how to use our eSign Console, please visit our [Product Training Page](#).



AutoPrep

eSign Console

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

The screenshot displays the eSign Console interface for Steve Truitt. The top navigation bar includes links for Scheduler, Monitoring, Accounts, eSign Requests, and Create Request. The main section, titled 'Active Requests Showing 1 - 50 of 92', contains a table of loan requests. A modal window is open, providing details for a specific loan request (Loan #: 081620220004).

Active Requests Table:

Loan #	Document Set	Signer	Status	Ver	Created	CS	IS	RESPA
081620220004	Closing Documents	Sandy Smith (+4) struitt@docmagic.com	New 2843	1	8/16/22 12:31 PM	✓		
77708161207	Closing Documents	John Smith (+4) struitt@docmagic.com	In Progress 2840	1	8/16/22 10:23 AM	✓		
777081620220002		John Smith (+2)	New	1	8/16/22			

eSign Console - Steve Truitt (Modal View):

Loan #: 081620220004
Primary Name: Sandy Smith
Type: EClosing
Package Id: 578816
Worksheet #: 2843 (Version : 1)
Closing Date: 8/17/22

Lender: Steve Truitt
DSI TEST LENDER (SALES) (100SALES)
struitt@docmagic.com
(800)649-1362

Documents Table:

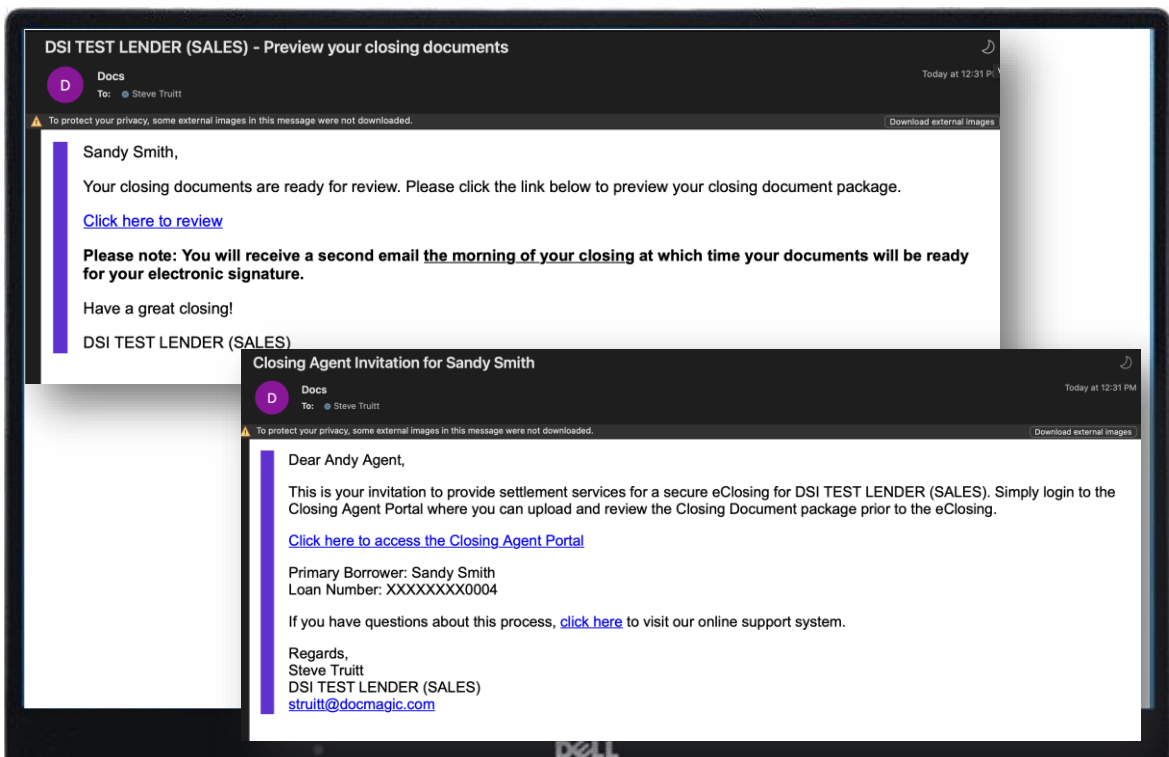
Document Name	ClickSign	Page(s)	Mark(s)	Signer(s)	Completed	Signreq Document Id Document Id
1 Closing_Documents_AP_2022-08-16_12:24:45	✓	24	4	1		5036478 5047977
2 Multistate Fixed Rate Electronic Note	✓	4	1	1		5036479 5047978

Buttons: Details, Documents, Documents Received, Emails, Versions

Buttons: Add Internal Note



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



AutoPrep

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.

DocMagic eClose Console (Settlement Agent)

LOAN
Loan #: 777-1616630796081
Primary Borrower: Erica Sample
Type: E Closing
Package ID: 333727
Worksheet #: 1616630796081 (Version: 1)

LENDER
Company: DSI TEST LENDER (SALES)
Contact: Michael Morford
Email: mikam@docmagic.com
Phone: (800) 649-1362

COUNTDOWN TO CLOSING
DAYS: 0 HOURS: 6 MINUTES: 51 SECONDS: 26
Date: Mar 25, 2021 (Thu) Time: 12:00am PDT

Signers (2)

#	Signer Name / Email	Role	Notary Name / Email	Notary Type / Closing Date - Time	KBA / Status	ID Verify / Status	Status	eSign
1	Erica Sample erica.sample@example.com	Borrower	Notary_name_placehold... NOTARY_EMAIL_PLACE...	3/25/2021 - 12:00am			Not Started	<button>Open Signing Room</button>
2	Sally Settlement sally.settlement@example.com	Settlement Agent	Unassigned				Ready to Sign	<button>Open Signing Room</button>

Documents (15)

#	eSign Enabled	Page(s)	Signer(s)	Completed
1	Uniform Residential Loan Application	9	1	✓
2	MERS California Deed of Trust	16	2	✓
3	Specific Closing Instructions	3	2	✓
4	California Hazard Insurance Disclosure	1	1	✓
5	Hazard Insurance Authorization and Requirements	2	1	✓
6	Borrower Consent to the Use of Tax Return Information	1	1	✓

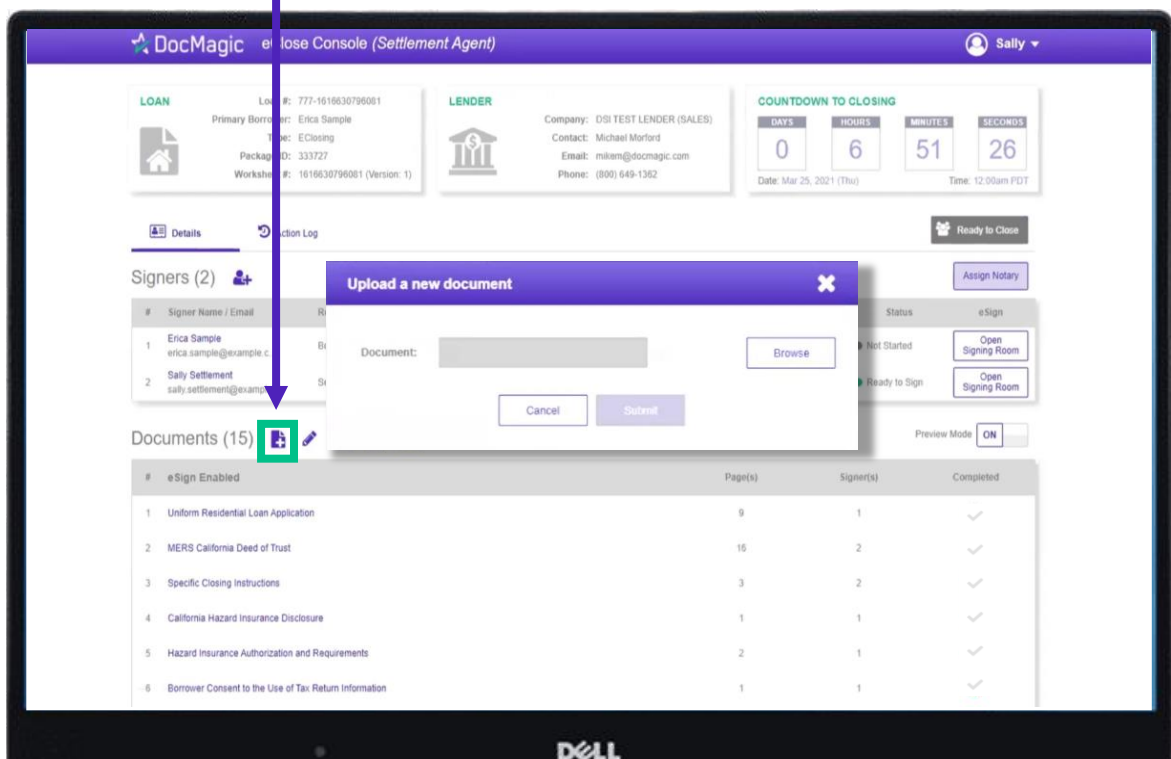
For more information about the Settlement Agent Portal, please visit our [Product Training Page](#).



AutoPrep – Settlement Agent

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.



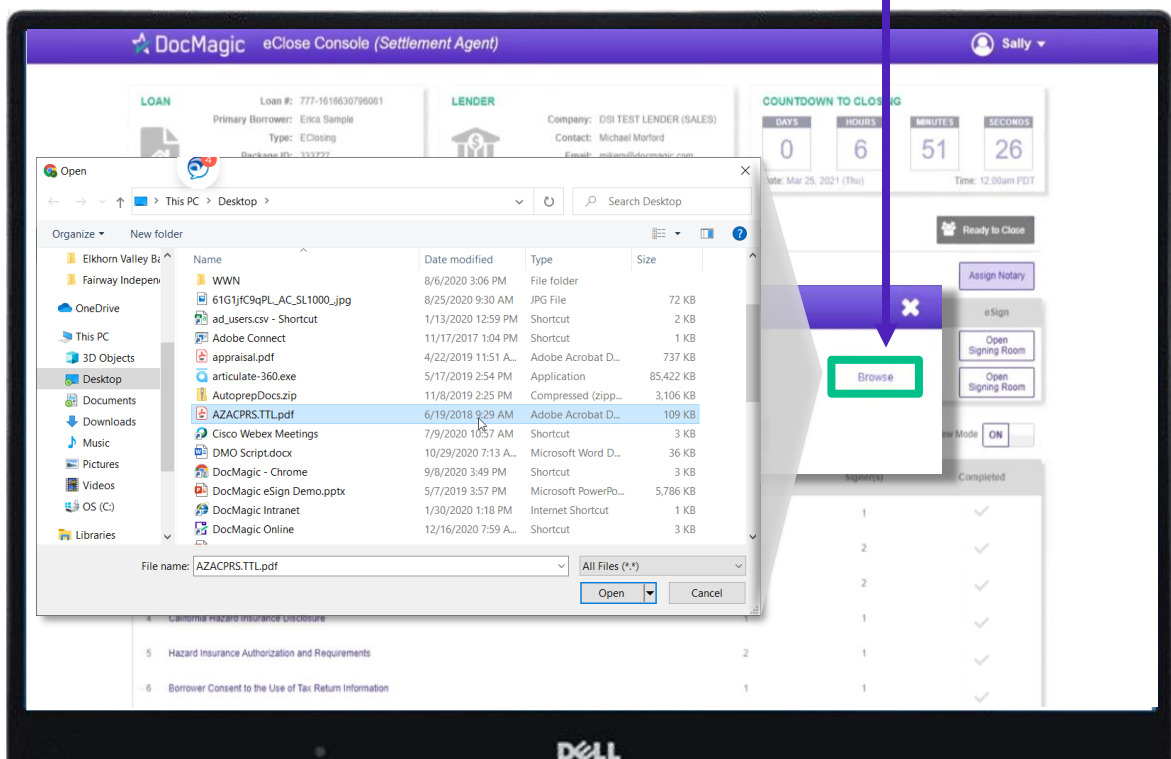
Any file you upload to the Documents section will automatically trigger AutoPrep.



AutoPrep – Settlement Agent

Uploading a File

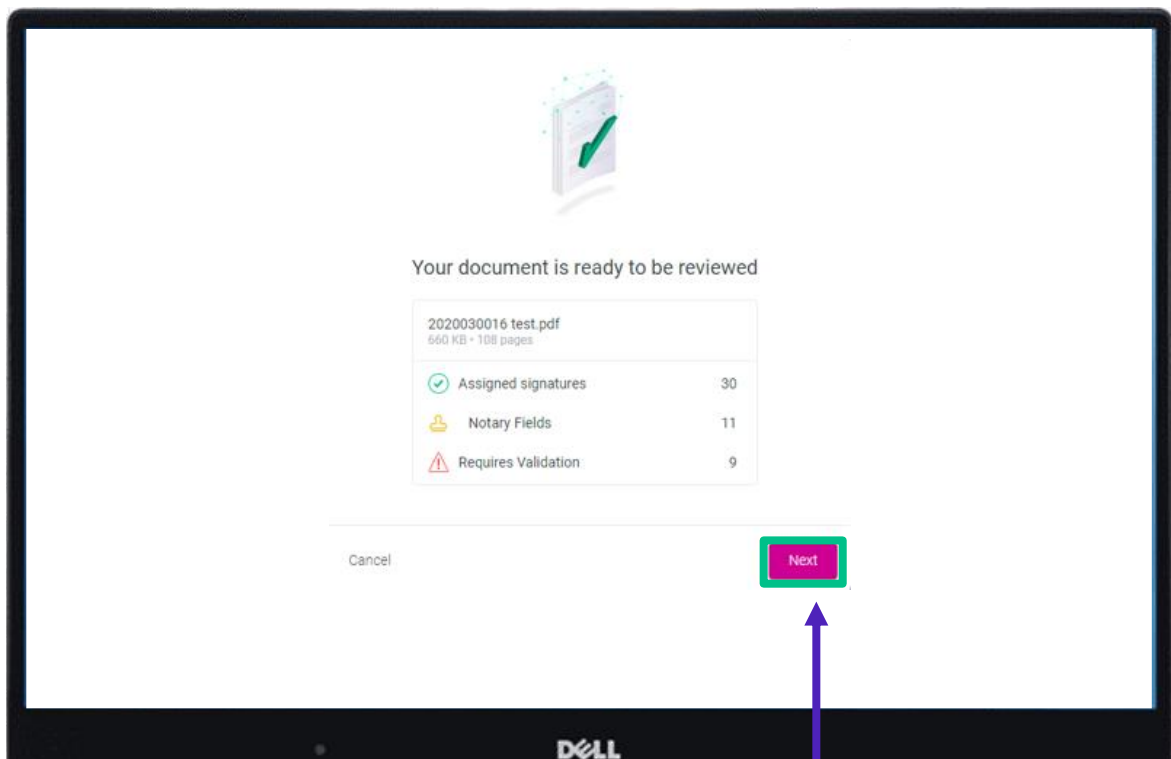
Click the Browse button to navigate to the document you would like to add to the package.



AutoPrep – Settlement Agent

Document Pre-Review

When the document is uploaded, AutoPrep uses A.I. and machine learning to prepare documents for signature. The software will check for and assign signatures, date boxes, and any Post-fill boxes needed.



The whole process takes a few short seconds, and your document is ready to review. Click Next.



AutoPrep – Settlement Agent

Green versus Red

Green means that the signature line has been identified to match a previously entered borrower/signer.

The screenshot shows a Dell monitor displaying a document titled "APPRAISAL DELIVERY WAIVER". The document contains several sections: a waiver notice, two checkboxes for waiving appraisal rights, a note about HPML loans, an "ACKNOWLEDGMENT OF INFORMATION" section, and a signature line. A dropdown menu is open over the signature line, showing a list of names: "Unassigned", "Sammy Sample Borrower 1", "Sally Sample Borrower 2", "To be determined Notary", "Belinda Helmick Settlement Agent", "Unspecified Originator", and "Unassigned". A red pin icon is visible on the signature line. On the right side of the screen, there are two circular icons: a green one with a checkmark and a red one with a warning triangle. A purple arrow points from the text box above to the green icon, and another purple arrow points from the text box below to the red icon.

Red means that AutoPrep has found a signature line, but not a signer

Red fields *must* be verified before sending the document to proceed with eSign



AutoPrep – Settlement Agent

Signature Marks

You have the option to correct the signature mark or choose 'Not needed for this transaction.'

A screenshot of a notary public certificate form displayed on a Dell monitor. The form includes a disclaimer box at the top, followed by fields for 'State of' and 'County of'. Below these is a line for 'Subscribed and sworn to (or affirmed) before me on this ___ day of ___'. The 'by' line is populated with 'John Smith' and has a red signature mark icon. A dialog box is open over the 'by' line, asking 'Why are you deleting this signature mark?'. It has two radio button options: 'Not a signature mark' (selected) and 'Not needed for this transaction'. At the bottom of the dialog are 'Cancel' and 'Delete' buttons. A blue signature mark icon is also visible at the bottom of the form.

A notary public or other officer completing this certificate verifies only the identity of the individual who signed the document to which this certificate is attached, and not the truthfulness, accuracy, or validity of the document.

State of _____

County of _____

Subscribed and sworn to (or affirmed) before me on this _____ day of _____

by John Smith

proved to me on the basis of satisfactory evidence to be the person(s) who

Why are you deleting this signature mark?

☒ Not a signature mark

☐ Not needed for this transaction

Cancel Delete



AutoPrep – Settlement Agent

Green / Blue Fields

The borrower will be highlighted in green.

The screenshot shows a DocMagic document titled "2020030016 test.pdf". The document is a loan agreement. A green highlight is placed over the "Borrower" field, which is labeled "Terry M Mackey (Borrower 1)". A blue highlight is placed over the "Notary" field, which is labeled "Notary Public". The form includes fields for "State of", "County of", and "My Commission Expires:". A green arrow points from the text box above to the green highlight, and a blue arrow points from the text box below to the blue highlight. A plus sign icon is visible in the bottom right corner of the document area.

Blue indicates a field that needs to be filled out via text/signature.



AutoPrep – Settlement Agent

Fill Out Blank Fields

You can fill out blank fields by clicking the plus.

The screenshot displays the DocMagic AutoPrep interface for a document titled "2020030016 test.pdf". The document text includes a loan agreement and a date field set to "DATED this 24th day of Apr 11, 2020". Below the date, there is a dropdown menu for the borrower, currently showing "Terry M Mackey (Borrower 1)". The document also contains fields for "State of" and "County of", both of which are blank. A signature line reads "This instrument was acknowledged before me on _____ by Terry M Mackey." Below this, there is a dropdown menu for the notary, currently showing "Notary". The notary's title "Notary Public" is displayed below the dropdown. The commission expiration date is indicated by the text "My Commission Expires: _____". A green arrow points from the text "You can fill out blank fields by clicking the plus." to a green square button with a white plus sign, which is located in the bottom right corner of the document area.



AutoPrep – Settlement Agent

AI at Work

AutoPrep will always guess the borrowers when they are not clearly assigned in signature marks.

Uniform Residential Loan Application

This application is designed to be completed by the applicant(s) with the Lender's assistance. Applicants should complete this form as "Borrower" or "Co-Borrower", as applicable. Co-Borrower information must also be provided (and the appropriate box checked) when ☐ the income or assets of a person other than the Borrower (including the Borrower's spouse) will be used as a basis for loan qualification or ☐ the income or assets of the Borrower's spouse or other person who has community property rights pursuant to state law will not be used as a basis for loan qualification, but his or her liabilities must be considered because the spouse or other person has community property rights pursuant to applicable law and Borrower resides in a community property state, the security property is located in a community property state, or the Borrower is relying on other property located in a community property state as a basis for repayment of the loan.

This is an application for joint credit. Borrower and Co-Borrower each agree that we ☐ do not ☒ do apply for joint credit (sign below):

Borrower: Co-Borrower:

I. TYPE OF MORTGAGE AND TERMS OF LOAN

Mortgage Applied for:	<input type="checkbox"/> VA <input checked="" type="checkbox"/> Conventional <input type="checkbox"/> Other: (explain)	Agency Case Number	Lender Case Number
	<input type="checkbox"/> FHA <input type="checkbox"/> USDA/Rural Housing Service		2020030016
Amount	Interest Rate	No. of Months	Amortization Type:
\$400,000.00	3.250%	360	<input checked="" type="checkbox"/> Fixed Rate <input type="checkbox"/> Other: (explain): <input type="checkbox"/> GPM <input type="checkbox"/> ARM (type):

II. PROPERTY INFORMATION AND PURPOSE OF LOAN

Subject Property Address (street, city, state & ZIP)			No. of Units
1107 Chesterton Drive, Richardson, TX 75080			1
Legal Description of Subject Property (attach description if necessary)			Year Built
			1978
Purpose of Loan	<input type="checkbox"/> Purchase <input type="checkbox"/> Construction <input type="checkbox"/> Other: (explain):	Property will be:	
	<input checked="" type="checkbox"/> Refinance <input type="checkbox"/> Construction-Permanent	<input checked="" type="checkbox"/> Primary Residence <input type="checkbox"/> Secondary Residence <input type="checkbox"/> Investment	
Complete this line if construction or construction-permanent loan.			
Year Lot Acquired	Original Cost	Amount Existing Liens	(a) Present Value of Lot
	\$		\$
		(b) Cost of Improvements	Total (a + b)
		\$	\$
Complete this line if this is a refinance loan.			
Year Acquired	Original Cost	Amount Existing Liens	Purpose of Refinance
2000	\$240,000.00	\$146,914.00	CASH OUT OTHER
Title will be held in what Name(s)		Manner in which Title will be held	Estate will be held in:

Along with other fields, you must check and correct **every** field before you're done.



AutoPrep – Settlement Agent

User Responsibility

It is crucial that you assign fields correctly and fix wrongly identified fields every time so the system can learn from your edits.

The undersigned Borrower(s) do hereby so agree and covenant in order to assure that this loan documentation executed this date will conform and be acceptable in the marketplace in the instance of transfer, sale or conveyance by Lender of its interest in and to said loan documentation, and to assure marketable title in the said Borrower(s).

DATED this 24th day of April, 2020.

Terry Mackey (Borrower 1) [X]
- BORROWER - Terry M Mackey - DATE - [X]
State of [X]
County of [X]

This instrument was acknowledged before me on _____ by Terry M Mackey.

Notary [X]
Notary Public [X]
My Commission Expires: [X]

Done

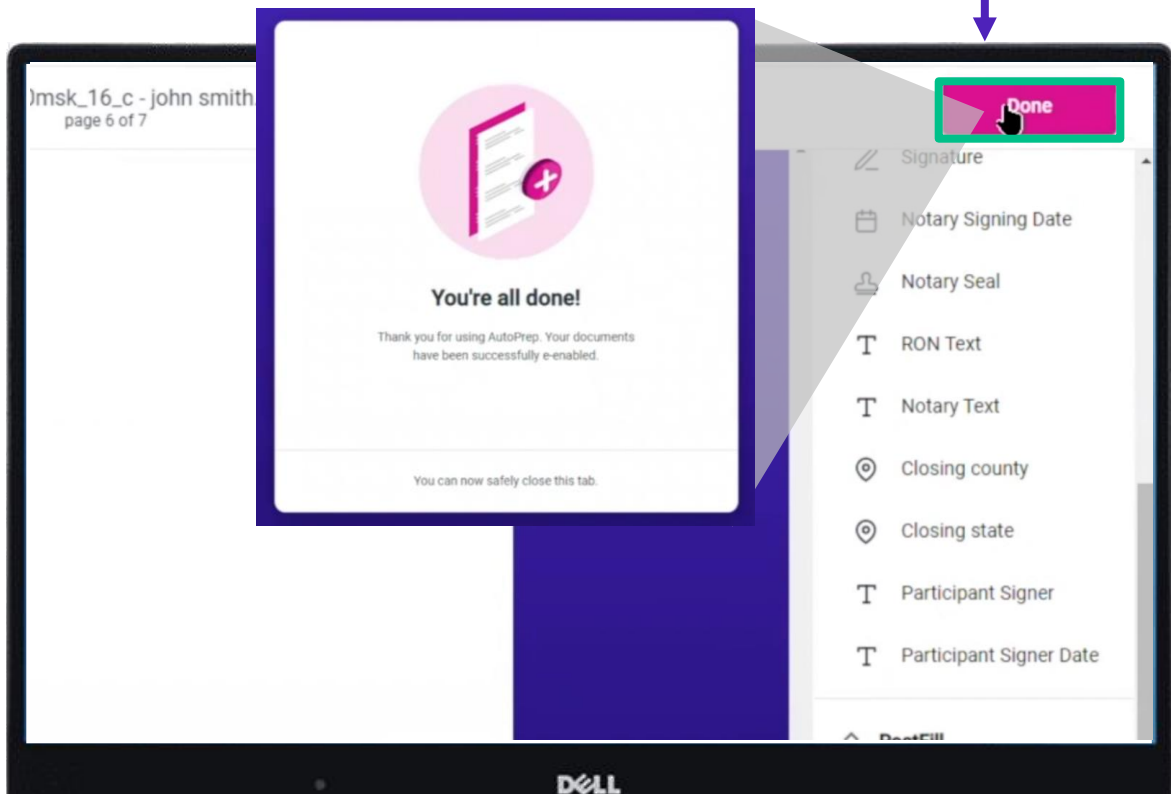
- Signature
- Notary Signing Date
- Notary Seal
- T RON Text
- T Notary Text
- Closing county
- Closing state
- T Participant Signer
- T Participant Signer Date



AutoPrep – Settlement Agent

That's A Wrap

After correcting and verifying all fields, click Done.

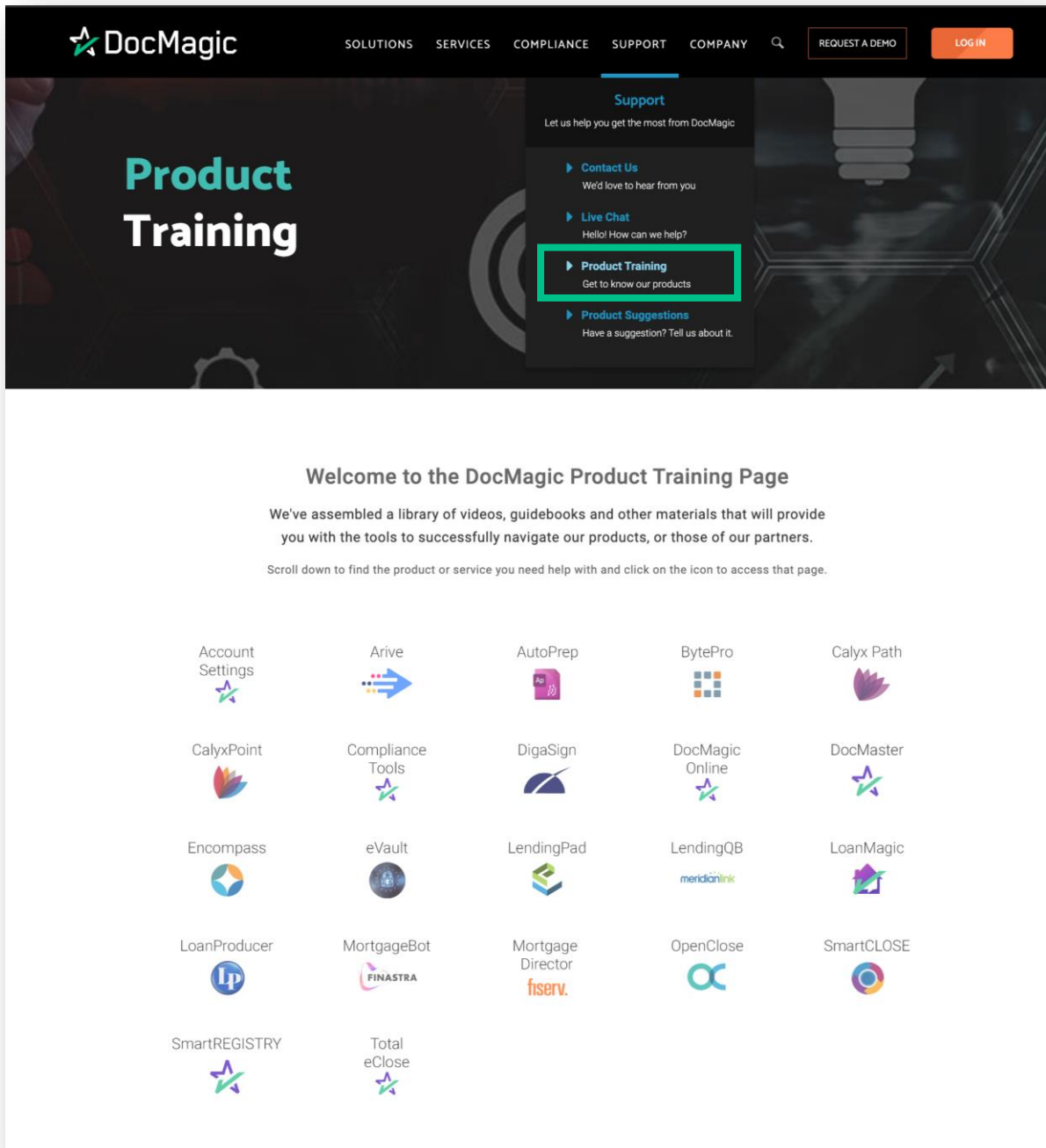


The Machine Learning and AI will remember these corrections for next time.



Additional Resources

Product Training Page



The screenshot shows the DocMagic website's Product Training page. At the top, the DocMagic logo is on the left, and navigation links for SOLUTIONS, SERVICES, COMPLIANCE, SUPPORT, and COMPANY are in the center. On the right, there are buttons for 'REQUEST A DEMO' and 'LOG IN'. Below the navigation bar, a large banner features the text 'Product Training' in large, bold letters. To the right of this text is a 'Support' dropdown menu with options: 'Contact Us', 'Live Chat', 'Product Training' (highlighted with a red box), and 'Product Suggestions'. Below the banner, a section titled 'Welcome to the DocMagic Product Training Page' contains a paragraph about the library of videos and guidebooks, and a scroll-down instruction. The main content area is a grid of 20 product/service icons arranged in 4 rows and 5 columns. The icons are: Account Settings, Arive, AutoPrep, BytePro, Calyx Path, CalyxPoint, Compliance Tools, DigaSign, DocMagic Online, DocMaster, Encompass, eVault, LendingPad, LendingQB, LoanMagic, LoanProducer, MortgageBot, Mortgage Director, OpenClose, and SmartCLOSE. The bottom row contains SmartREGISTRY and Total eClose.

Product Training

Support
Let us help you get the most from DocMagic

- ▶ **Contact Us**
We'd love to hear from you
- ▶ **Live Chat**
Hello! How can we help?
- ▶ **Product Training**
Get to know our products
- ▶ **Product Suggestions**
Have a suggestion? Tell us about it.

Welcome to the DocMagic Product Training Page

We've assembled a library of videos, guidebooks and other materials that will provide you with the tools to successfully navigate our products, or those of our partners.

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