



Lender Experience

Lender Experience

Introduction



This guide goes over the lender's experience when processing loan documents with DocMagic.



Lender Experience

DocMagic Online

For this example, we're going to demonstrate processing a set of documents through DocMagic Online.

The screenshot displays the DocMagic Online dashboard for a user named Alan. The interface is organized into several key sections:

- Header:** Includes contact information (INFO@DOCMAGIC.COM, PHONE (800) 649-1362), social media icons, and a "DASHBOARD / LOG OUT" button.
- Navigation:** A menu with links for SOLUTIONS, SERVICES, COMPLIANCE, SUPPORT, and COMPANY.
- Personalization:** A "WELCOME ALAN! (#100AD)" message and a "TOUR THE DASHBOARD" link.
- Launch Center:** A vertical list of tool icons including eSign Console, AutoPrep™, DocMagic®, DocMagicXL®, SmartCLOSE®, LoanMagic® Console, eVault, and SmartREGISTRY™.
- My Documents:** A grid of document management tools:
 - DOCUMENT FILES:** Access and manage your loan document files.
 - FORMS MANAGER:** Add and remove forms from your document packages.
 - STACKING ORDER:** Modify the order of documents in your packages.
 - REPORT MANAGER:** Generate reports: 1098, Closing, HMDA, LEF and more.
 - LOAN DEFAULTS:** Manage charges, fees, premiums, impounds, and more.
 - SAMPLE DOCUMENT REVIEW:** Review and approve your sample documents.
- Account Settings:** A section for managing user accounts and permissions, including options for USERS, PLAN MANAGER, and LENDER PROFILE.
- Compliance Edge:** Tools and resources to help you stay on top of compliance change as it happens.
- Help Center:** Search our knowledge base for answers to your common questions.
- Latest News:** A list of recent updates, including "URLA: Updates, Improvements and Deadlines", "Getting Started with eClose", and "Closing a Loan Electronically".

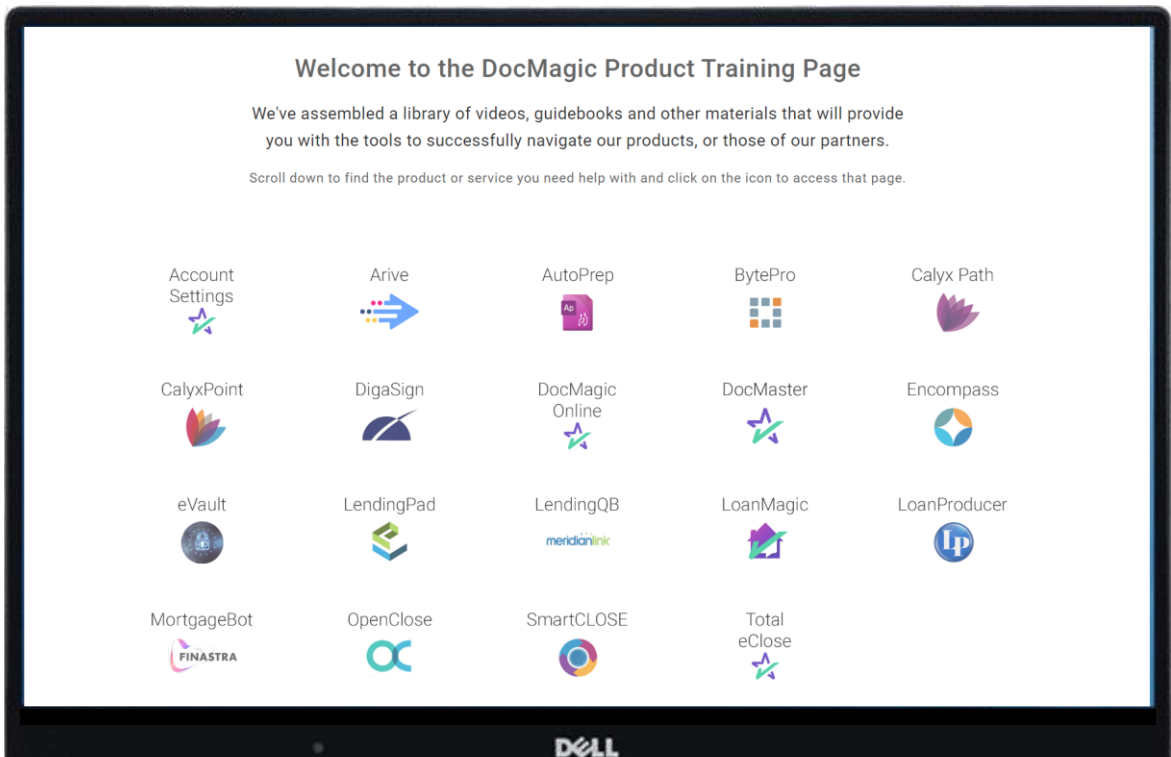
The Dell logo is visible at the bottom center of the monitor frame.



Lender Experience

Other LOS's

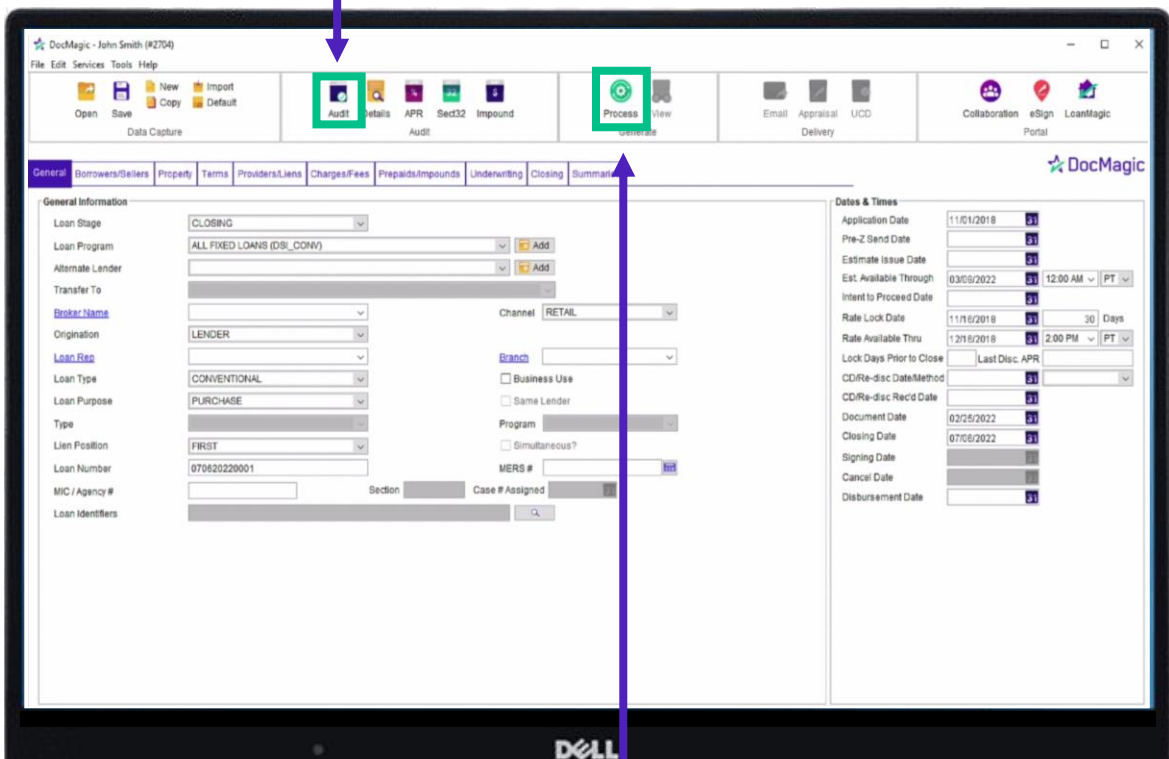
You can find training for other LOS's on our [Product Training Page](#).



Lender Experience

Audit

Once the information is collected and entered, we always recommend that you run an audit.



Sometimes, the Process button will be greyed out until you run an Audit.



Lender Experience

Audit

DocMagic's Audit function contains a robust [Loan Detail Report](#), which is the hallmark of our compliance initiative. Click Details to view.

The screenshot displays the DocMagic software interface. At the top, the title bar reads "DocMagic - John Smith (#270)" and "Data Validation - Worksheet #2704". The menu bar includes "File", "Edit", "Services", "Tools", and "Help". Below the menu bar, there are icons for "Open", "Save", and "Data Capt". A toolbar contains buttons for "Audit", "Process", "Details", "APR", "High Cost", "Impounds", and "Print". The "Details" button is highlighted with a green box, and a purple arrow points from the text above to it.

The main content area shows a warning message: "12 Warning issues have been detected." Below this is a table with two columns: "Type" and "Message".

Type	Message
WARNING	Document Date is more than '5' days in the past
WARNING	No Pre-Z Send Date. Used Application Date plus three business days.
WARNING	Impound Account Low Balance (-1395.96) is less than zero.
WARNING	Loan term is not greater than 30 years.
WARNING	Please select either a QM Type or an ATR/QM Exemption Type.
WARNING	No Transfer Taxes found
WARNING	Settlement Agent is missing File Number.
WARNING	Only escrowed items included in Estimated Taxes, Insurance, and Assessments. Ensure all mortgage-related obligations are entered.
WARNING	No tolerance audits will apply until after the first Loan Estimate is processed.
WARNING	This loan is eligible for electronic recording.
WARNING	HAZARD INSURANCE Disbursement of \$850.00 on 03/01/2022 applied to Starting Balance.
WARNING	CITY PROPERTY TAX Disbursement of \$2,500.00 on 03/01/2022 applied to Starting Balance.
MESSAGE	Worksheet Saved
MESSAGE	Worksheet Audited (outstanding audits detected)

The interface also includes a sidebar on the left with "General Information" and a list of fields: "Loan Stage", "Loan Program", "Alternate Lender", "Transfer To", "Broker Name", "Origination", "Loan Rec", "Loan Type", "Loan Purpose", "Type", "Lien Position", "Loan Number", "MIC / Agency #", and "Loan Identifiers". On the right, there is a "DocMagic" logo and a "Portal" section with various settings and a "Print" button.



Lender Experience

Loan Detail Report Tabs

Within these three tabs, you can verify the transaction details, validate the data, and get a comprehensive compliance audit.

Loan Detail Report

DocMagic

Loan Number: 070620220001 File ID: 2704
Borrower Name: JOHN SMITH Client Number: 100SALES
Property Address: 935 WILLOW STREET, BURLINGTON NJ 08016 Date of Report: 07/06/2022

General | Borrowers/Sellers | Properties

Transaction Details | Data Validation | Compliance Audit

DETAILS

LENDER INFO

Lender Name:	DSI TEST LENDER (SALES)	Transfer To:	
Loan Program:	ALL FIXED LOANS (DSL_CONV)		

LOAN IDENTIFIERS

Loan Number:	070620220001	FHA/VA Case:		MERS #:	
Loan Purpose:	Purchase	Loan Type:	Conventional	Origination Type:	Lender
FHA Section:		MIC #:			
Loan Rep:		Broker Name:		Branch:	

IMPORTANT DATES

Application Date:	11/01/2018	Cancel Date:		CD/Re-Disc Send Date:	
Document Date:	02/25/2022	Disbursement Date:		CD/Re-Disc Method:	
Closing Date:	07/06/2022	Est. Avail. Through:	03/09/2022	CD/Re-Disc Recv. Date:	
Signing Date:		Pre-Z Send Date:			

RATE LOCK

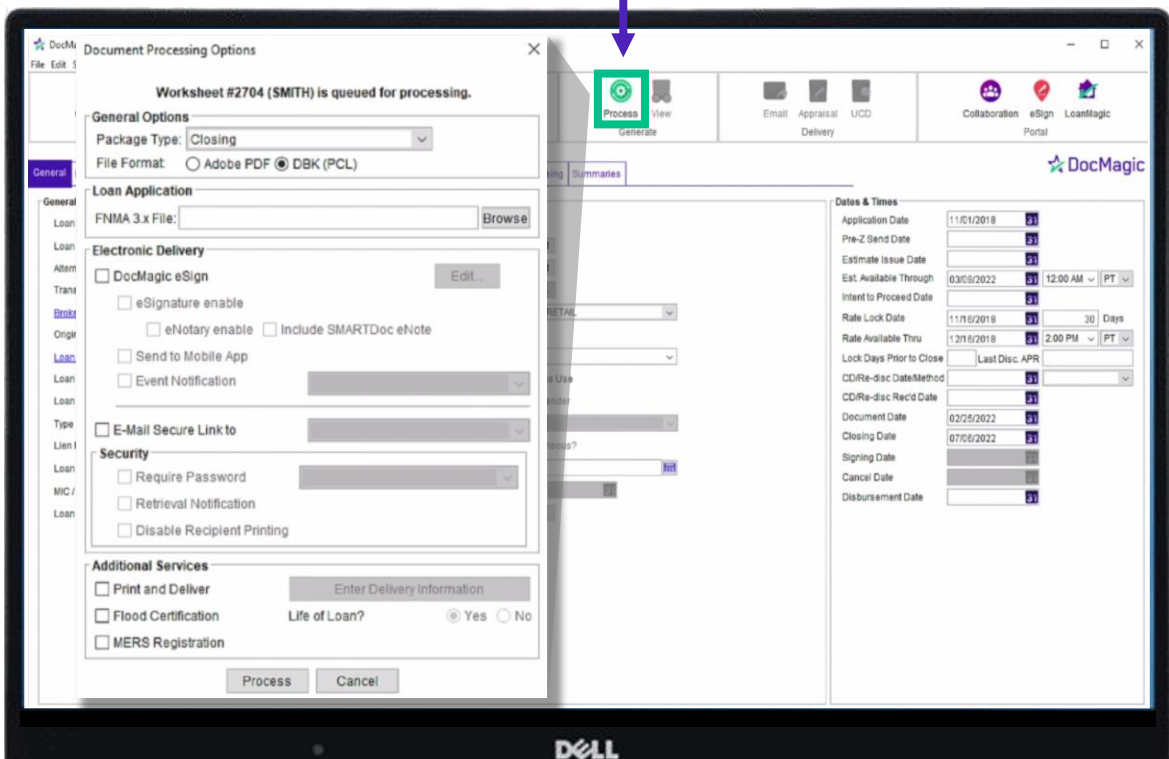
Rate Lock Date:	11/16/2018	Rate Avail. Through:	12/16/2018	Lock Prior to Close:	
Rate Lock Days:	30 days	Time:	2:00 PM	Last Disclosed APR:	



Lender Experience

Process

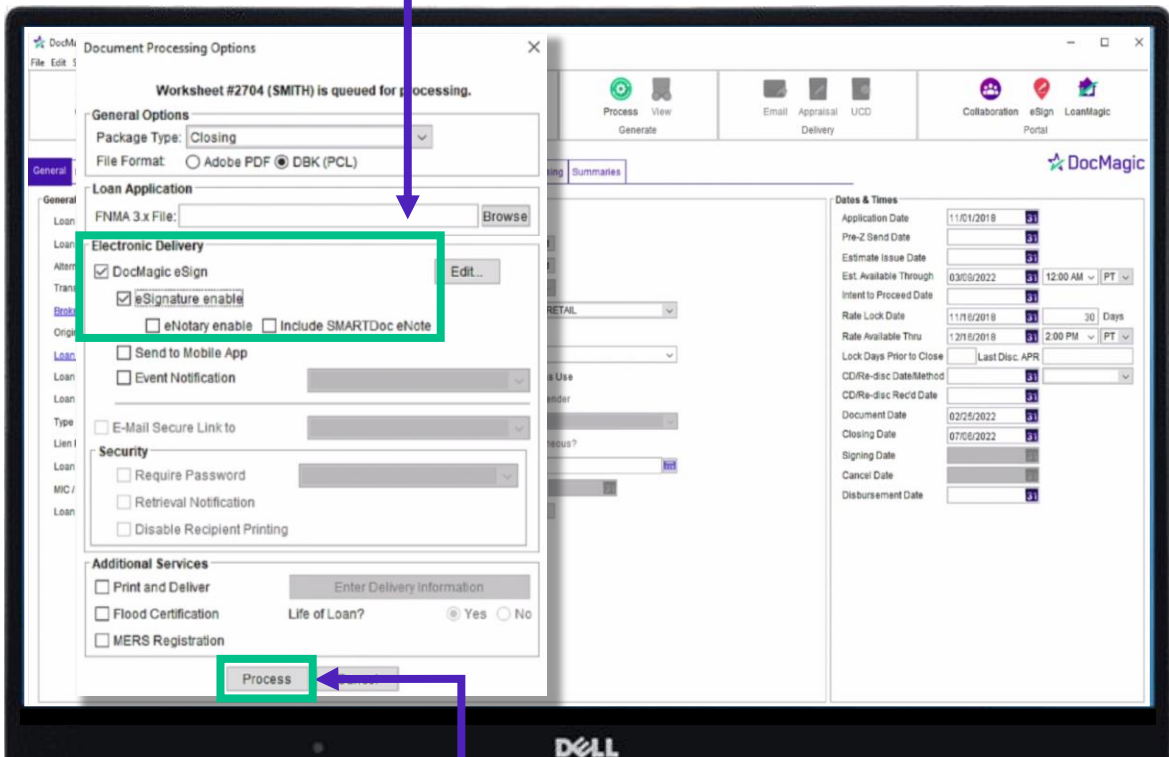
Once the information has been vetted, and you're ready to move forward, you can process the documents by clicking here.



Lender Experience

Process

With DocMagic Online, you can choose Hybrid 1, 2, 3 or Total eClose™. In this case, we're going to process a Hybrid 1, which is eSign with paper note and paper notary.



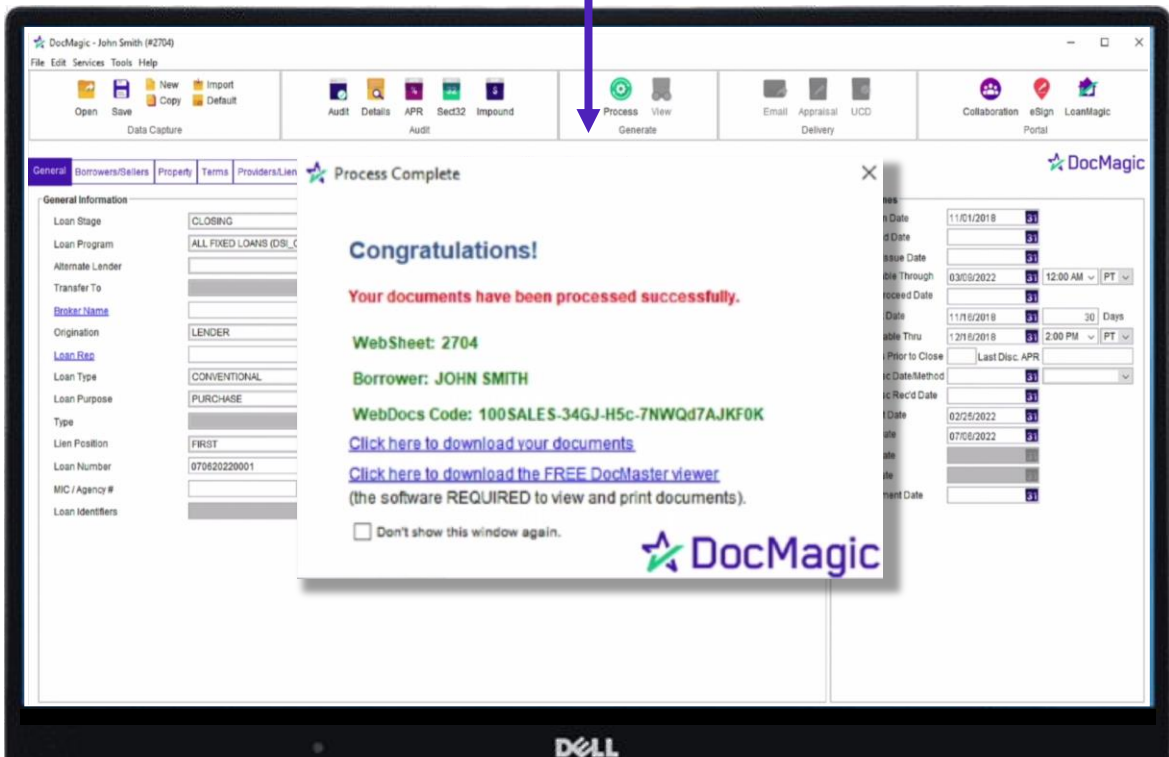
Click Process.



Lender Experience

Confirmation

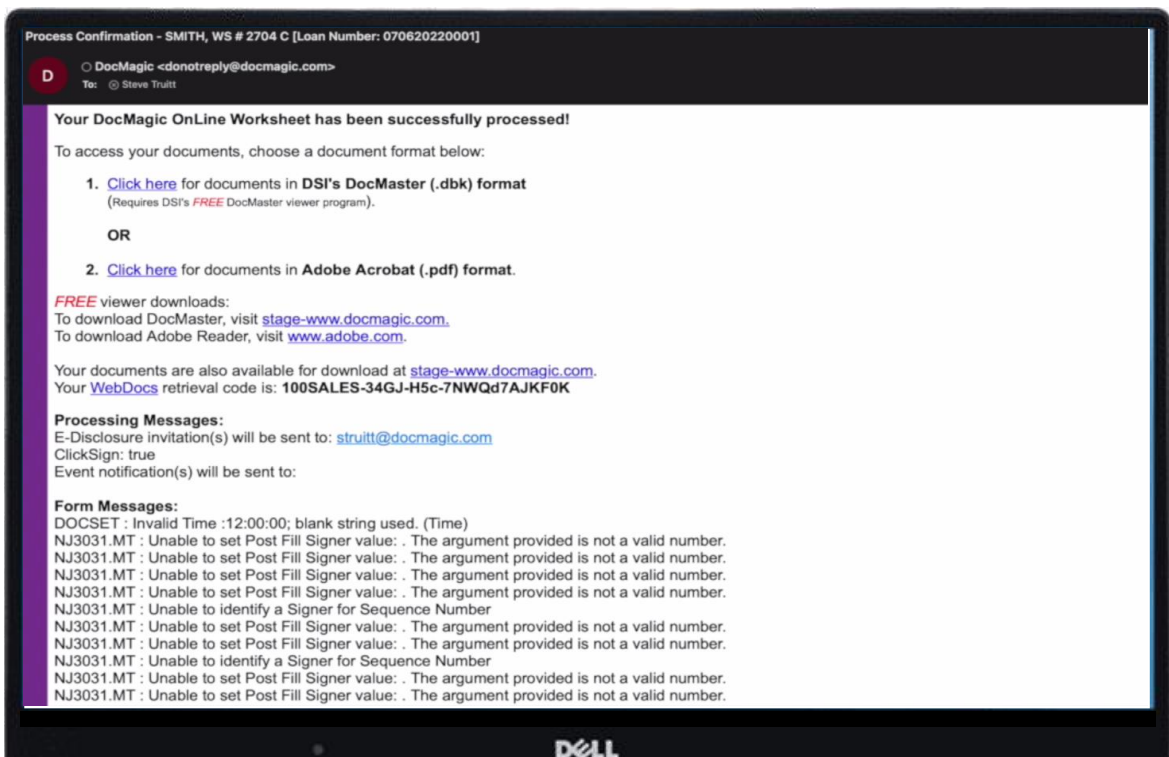
You'll receive a confirmation message.



Lender Experience

Confirmation

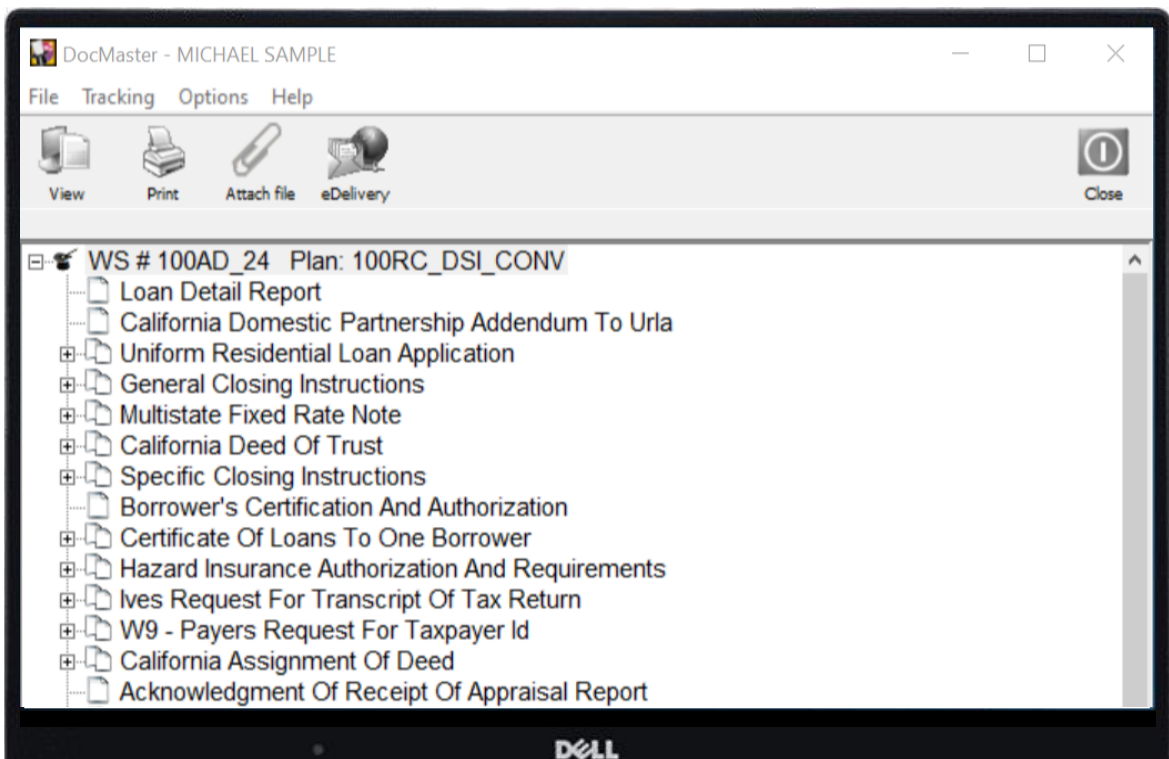
You'll also get a confirmation email that looks like this.



Lender Experience

DocMaster

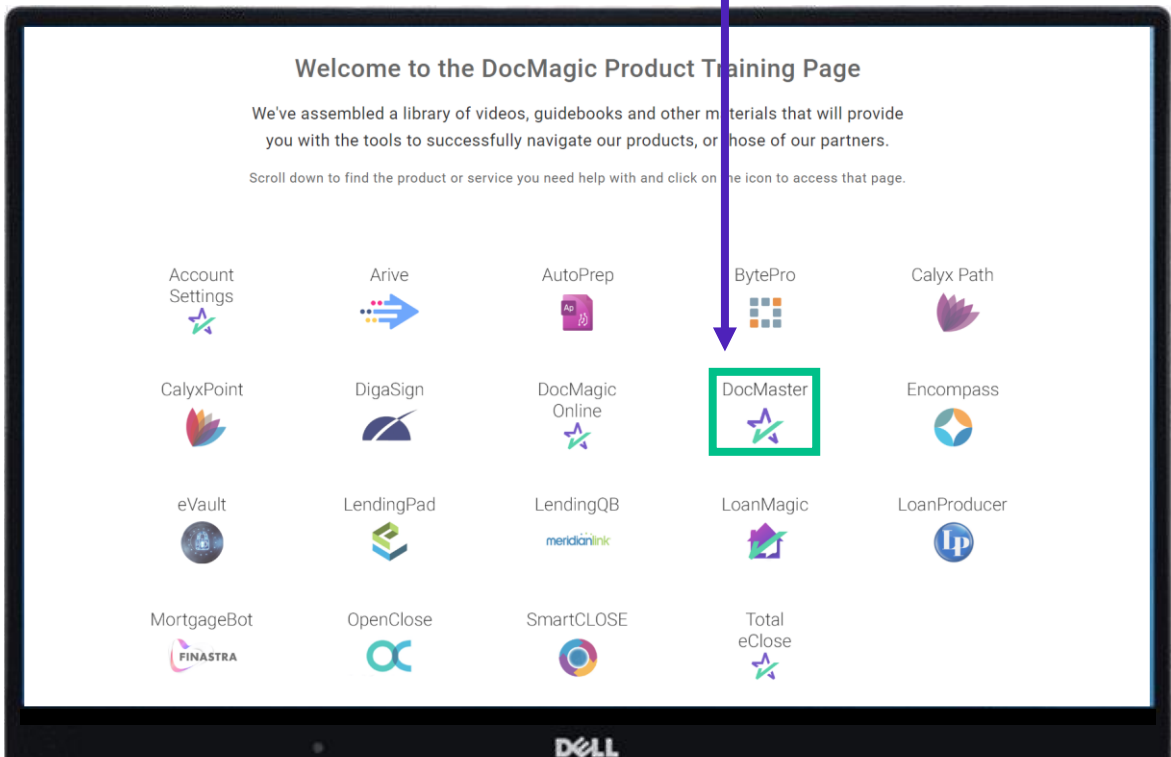
From the confirmation message and/or email, you can activate DocMaster, our proprietary document window that allows you to preview, prep, and edit the Documents before signing.



Lender Experience

DocMaster

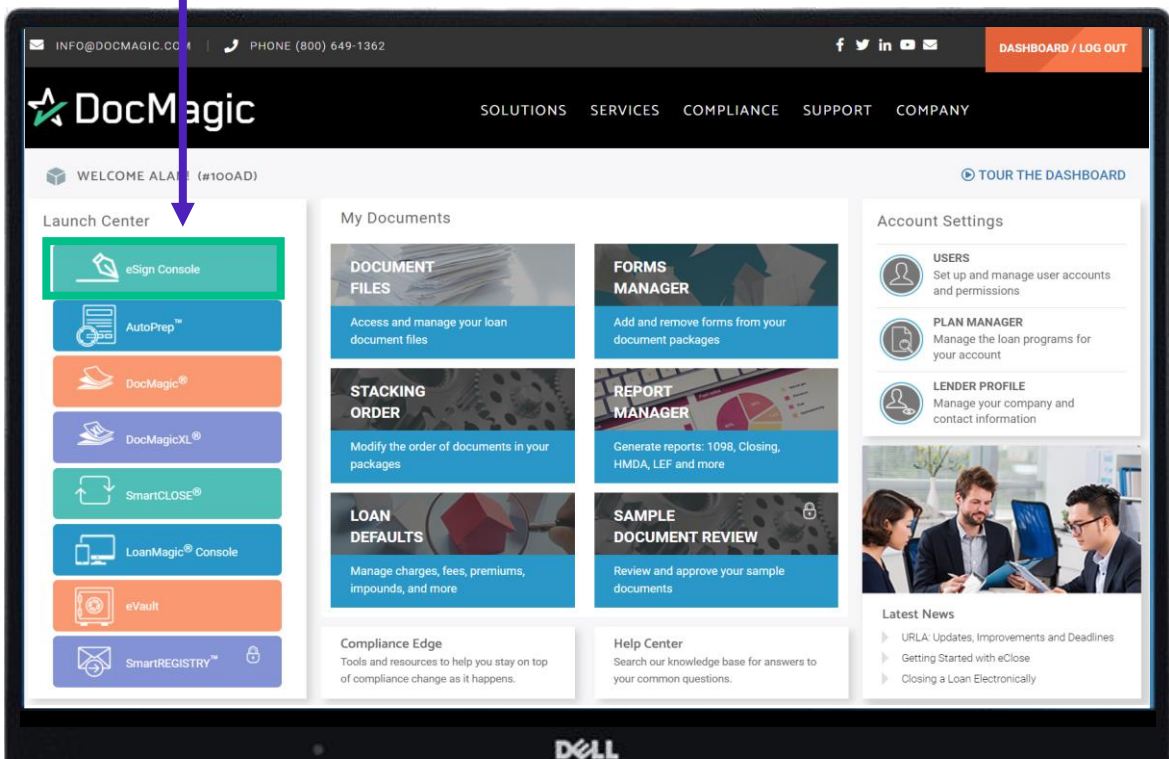
A training for DocMaster can be found on our Product Training Page.



Lender Experience

eSign Console

After sending out the documents, you can access your [eSign Console](#) here on docmagic.com.



Lender Experience

eSign Console

A listing of processed documents will be here.

eSign Console - Steve Truitt

Scheduler Monitoring Accounts eSign Requests Create Request

Active Requests Showing 1 - 50 of 60

2 Next Show: 50

Loan # Document Set	Storor Email	Status Worksheet #	Yer	Created	CS	IS	RESPA	PDF
070620220001 Closing Documents	John Smith (+1) struitt@docmagic.com	New 2704	1	7/6/22 11:47 AM	✓	✓	⊖	📄
77707061258 Closing Documents	John Smith (+1) leah@docmagic.com							
77707061217 Closing Documents	John Smith (+1) leah@docmagic.com							
77707061200 Closing Documents	John Smith (+1) leah@docmagic.com							
77707061159 Closing Documents	John Smith (+1) leah@docmagic.com							
77707061158 Closing Documents	John Smith (+2) leah@docmagic.com							
77707061157 Closing Documents	John Smith (+2) leah@docmagic.com							
070520220001 Closing Documents	John Smith (+1) struitt@docmagic.com							
77707051043 Closing Documents	John Smith (+4) ron@docmagic.com							
1656707943470 Closing Documents	1656707943470 Sample (+1) 1656707943470@example.com							
07012022001 Closing Documents	John Smith (+1) struitt@docmagic.com							
0630202200012 Closing Documents	John Smith (+2) struitt@docmagic.com							
063020220002 Closing Documents	John Smith (+1) struitt@docmagic.com							
062920220004 Initial Disclosure	John Smith (+2) mvlchis@docmagic.com							
062920220003 Closing Documents	John Smith (+2) mrangei@docmagic.com							
062920220001 Closing Documents	John Smith (+2) struitt@docmagic.com							
062820220002 Closing Documents	John Smith (+2) ron@docmagic.com							

AVAILABLE ONLY FOR 90 DAYS

It's crucial that you know that these loan packages will only be present on this console for 90 days after generation.



Lender Experience

eSign Console

After all signatures are collected, it's a good idea to download all signed documents to your desktop. This will be shown towards the end of the guide.

eSign Console - Steve Truitt

Scheduler Monitoring Accounts eSign Requests Create Request

Active Requests Showing 1 - 50 of 60

2 Next Show 50

Loan # Document Set	Signer Email	Status Worksheet #	Yr	Created	CS	IS	RESPA	PDF
070620220001 Closing Documents	John Smith (+1) struitt@docmagic.com	New 2704	1	7/6/22 11:47 AM	✓	✓	⊖	📄
77707061258 Closing Documents	John Smith (+1) leah@docmagic.com	In Progress 2703	1	7/6/22 11:32 AM	✓	✓	⊖	📄
77707061217 Closing Documents	John Smith (+1) leah@docmagic.com	New 2701	1	7/6/22 10:17 AM	✓	✓	⊖	📄
77707061200 Closing Documents	John Smith (+1) leah@docmagic.com	New 2700	1	7/6/22 10:00 AM			⊖	📄
77707061159 Closing Documents	John Smith (+1) leah@docmagic.com	Signed 2699	1	7/6/22 9:59 AM	✓	✓	⊖	📄
77707061158 Closing Documents	John Smith (+2) leah@docmagic.com	New 2695	1	7/6/22 9:59 AM	✓	✓	⊖	📄
77707061157 Closing Documents	John Smith (+2) leah@docmagic.com	New 2697	1	7/6/22 9:56 AM	✓		⊖	📄
070520220001 Closing Documents	John Smith (+1) struitt@docmagic.com	New 2696	1	7/5/22 9:23 AM	✓	✓	⊖	📄
77707051043 Closing Documents	John Smith (+4) ron@docmagic.com	New 2695	1	7/5/22 8:46 AM	✓		⊖	📄
1656707943470 Closing Documents	1656707943470 Sample (+1) 1656707943470@example.com	Signed 1656707943470	1	7/1/22 1:39 PM	✓		⊖	📄
07012022001 Closing Documents	John Smith (+1) struitt@docmagic.com	New 2694	1	7/1/22 1:37 PM	✓	✓	⊖	📄
0630202200012 Closing Documents	John Smith (+2) struitt@docmagic.com	Signed 2693	1	6/30/22 11:48 AM	✓	✓	⊖	📄
063020220002 Closing Documents	John Smith (+1) struitt@docmagic.com	Signed 2692	1	6/30/22 10:13 AM	✓	✓	⊖	📄
062920220004 Initial Disclosure	John Smith (+2) mvlchis@docmagic.com	Printed 2691	1	6/29/22 4:18 PM	✓	✓	📄	📄
062920220003 Closing Documents	John Smith (+2) mrangei@docmagic.com	New 2690	1	6/29/22 4:10 PM	✓	✓	⊖	📄
062920220001 Closing Documents	John Smith (+2) struitt@docmagic.com	New 2689	1	6/29/22 11:27 AM	✓	✓	⊖	📄
062820220002 Closing Documents	John Smith (+2) ron@docmagic.com	New 2684	1	6/28/22 2:03 PM	✓	✓	⊖	📄

Click on a Loan Number to go to the Loan Page.



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Loan Page

At the top of the page, you can see the details of the loan, the lender, and the status of the process.

The screenshot displays the 'eSign Console - Steve Truitt' interface. At the top, there is a navigation bar with links for Scheduler, Monitoring, Accounts, eSign Requests, Create Request, Search, and Account. Below this, a summary card provides loan details: Loan # 071320220002, Lender Steve Truitt (DSI TEST LENDER (SALES) (100SALES)), Status New (Active), Documents 15 (57 total pages), Signers 2, Expires N/A (Requires: Primary), and Signatures Y (Ink Sign). The card also lists Primary Name John Smith, Type EClosing, Package Id 562064, Worksheet # 2732 (Version : 1), and Closing Date 7/14/22.

Below the summary card are tabs for Details, Documents, Documents Received, EMail, and Versions. The Participants section shows a table with columns for #, Name/Email, Role, Created, Started, Consented, Viewed, Completed, Declined, and Links. Two participants are listed: John Smith (Borrower) and Andy Agent (Settlement Agent).

The Action Log section shows a table with columns for Date, User, IP Address, and Description. Three actions are listed: eSign event created, Invitation sent to struitt@docmagic.com, and Invitation sent to struitt@docmagic.com.

At the bottom, there are buttons for Add Internal Note, Cancel Request, and Delete Request. The footer includes copyright information and links for Home, Contact, Privacy Policy, and Terms of Use.



Lender Experience

Add Participants

The details tab has the participants listed. You can add participants by clicking here.

The screenshot displays the eSign Console interface for a user named Steve Truitt. The main window shows loan details for loan # 071320220002, primary name John Smith, and lender DSI TEST LENDER (SALES). A modal dialog box titled "Add Participant" is open, prompting the user to provide information for a new participant. The dialog includes fields for First Name, Last Name, Email, Access Code, and Role (set to Settlement Agent). There are "Add" and "Cancel" buttons at the bottom of the dialog. The background interface shows a "Participants" list with two entries: John Smith and Andy Agent. An "Action Log" table is also visible, showing system events like "eSign event created" and "Invitation sent to struitt@docmagic.com".

#	Name/Email
1	John Smith struitt@docmagic.com
3	Andy Agent struitt@docmagic.com

Date		
7/13/22 10:48 AM	System User	eSign event created
7/13/22 10:48 AM	John Smith	Invitation sent to struitt@docmagic.com
7/13/22 10:48 AM	Andy Agent	Invitation sent to struitt@docmagic.com

Populate the fields in the window that appears and click Add.



Lender Experience

Disable Preview Mode Toggle

By default, Preview Mode is On until closing and the Settlement Agent can toggle Preview Mode On and Off.

The screenshot shows the eSign Console interface for a loan. The top navigation bar includes 'Scheduler', 'Monitoring', 'Accounts', 'eSign Requests', 'Create Request', 'Search', and 'Account'. The loan details section shows:

- Loan #: 071320220002
- Primary Name: John Smith
- Type: EClosing
- Package Id: 562064
- Worksheet #: 2732 (Version : 1)
- Closing Date: 7/14/22
- Lender: Steve Truitt
- DSI TEST LENDER (SALES) (100SALES)
- struitt@docmagic.com
- (800)649-1362
- Status: New (Active)
- Documents: 15 (57 total pages)
- Signers: 2
- Expires: N/A (Requires: Primary)
- Signatures: Y (Ink Sign)

Below the details are tabs for 'Details', 'Documents', 'Documents Received', 'EMails', and 'Versions'. A 'Preview Mode - On' toggle is visible in the top right corner of the main content area. The 'Participants' section shows:

#	Name/Email	Role	Created	Started	Consented	Viewed	Completed	Declined	Links
1	John Smith struitt@docmagic.com	Borrower	7/13/22 10:47 AM						<input checked="" type="checkbox"/> Send Email <input checked="" type="checkbox"/> Preview Documents
3	Andy Agent struitt@docmagic.com	Settlement Agent	7/13/22 10:48 AM						<input checked="" type="checkbox"/> Send Email <input checked="" type="checkbox"/> Agent Portal

The 'Action Log' section shows:

Date	User	IP Address	Description
7/13/22 10:48 AM	System User		eSign event created
7/13/22 10:48 AM	John Smith		Invitation sent to struitt@docmagic.com
7/13/22 10:48 AM	Andy Agent		Invitation sent to struitt@docmagic.com

At the bottom, there are buttons for 'Add Internal Note', 'Cancel Request', and 'Delete Request'. The footer includes '© Copyright 2022 DocMagic, Inc. - ALL RIGHTS RESERVED' and 'Home Contact Privacy Policy Terms of Use'.

Turning Preview Mode Off allows the Settlement Agent to sign their documents before closing. *However, if they don't turn it back on, the borrower can also sign before closing.* The next few slides will go disabling this permission.



Lender Experience

Disable Preview Mode Toggle

Start by going to Accounts. You can always find it at the top.

eSign Console - Stephen Truitt

Scheduler Monitoring **Accounts** eSign Requests Create Request Search Account

Account Name:

Account Number:

Search

1 2 3 4 5 6 7 8 9 10 6068 Next

Account Number	Account Name	Group Id	Theme	Active	Use New Console	Use New Sign
100	System	0	DocMagic	✓	✓	
eSign	eSign	1000	DocMagic	✓	✓	
100DSI	DocMagic	2000	Cincinnati Federal	✓	✓	
100DSI-DMO	DocMagic	2010	DocMagic	✓	✓	
100CG	Chris Mortgage	10001	Box Home Loans 1004	✓	✓	
100JF	DSI_TEST_LENDER	10002	DocMagic	✓	✓	
100RC	DSI TEST LENDER (RON CARRILLO)	10003	Ron's clean sample	✓	✓	
100RL	RICKS TEST LENDER	10004	Fremont Bank	✓		
100MSM	DOCMAGIC TEST LENDER	10005	DocMagic (Michael Morford)	✓	✓	
100CM	SAMPLE LENDER	10006	Colin - Allied	✓	✓	
100SR	DSI TEST LENDER STEVE RIBULTAN	10007	DocMagic	✓	✓	
100MLA	MICHELLE DSI TEST	10008	American Financing Corporation	✓	✓	
100MZ	SAMPLE LENDER'S	10009	Test theme	✓	✓	
100ALS	ALANS DSI TEST LENDER	10010	DocMagic	✓	✓	
100NK	DOCUMENT SYSTEMS, INC. TEST	10011	Norm	✓		
100JB	JEREMY'S TEST LENDER	10012	DocMagic	✓	✓	

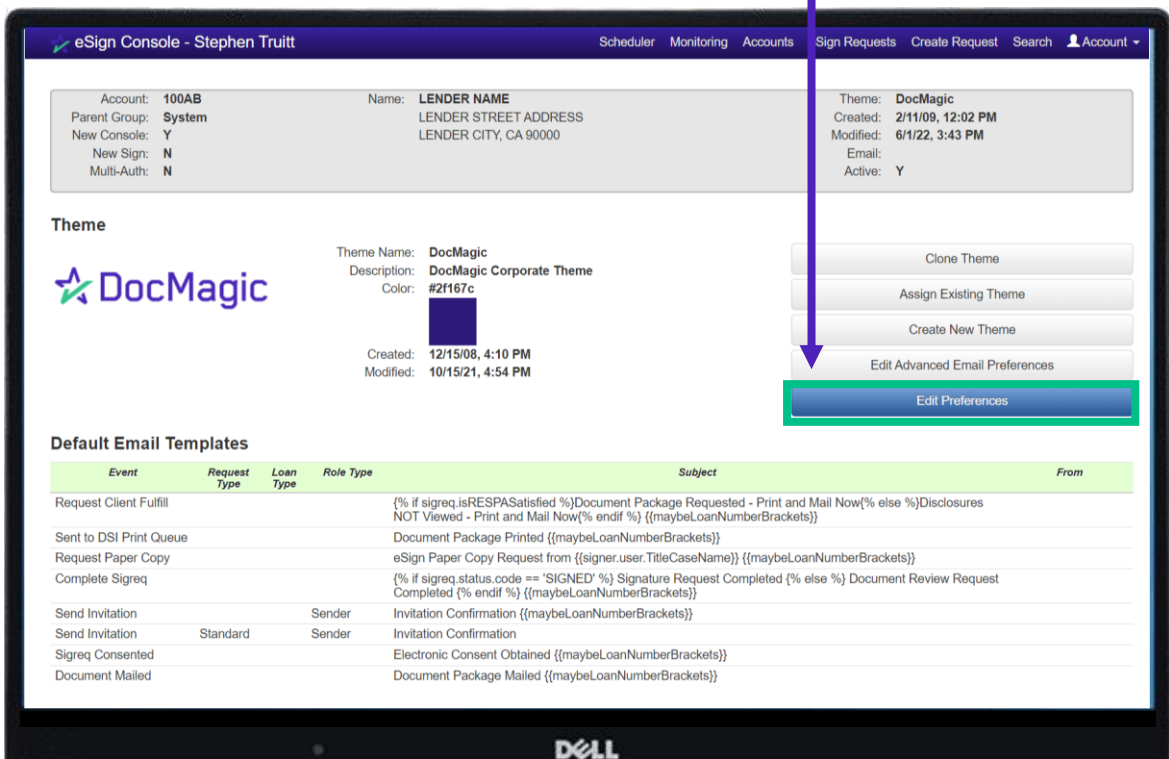
Click on an Account. The search function above allows you to filter by Account Name or Number.



Lender Experience

Disable Preview Mode Toggle


Select Edit Preferences.



eSign Console - Stephen Truitt Scheduler Monitoring Accounts Sign Requests Create Request Search Account

Account: **100AB** Name: **LENDER NAME** Theme: **DocMagic**
Parent Group: **System** LENDER STREET ADDRESS Created: **2/11/09, 12:02 PM**
New Console: **Y** LENDER CITY, CA 90000 Modified: **6/1/22, 3:43 PM**
New Sign: **N** Email:
Multi-Auth: **N** Active: **Y**

Theme

 Theme Name: **DocMagic**
Description: **DocMagic Corporate Theme**
Color: **#2f167c**
Created: **12/15/08, 4:10 PM**
Modified: **10/15/21, 4:54 PM**

Clone Theme
Assign Existing Theme
Create New Theme
Edit Advanced Email Preferences
Edit Preferences

Default Email Templates

Event	Request Type	Loan Type	Role Type	Subject	From
Request Client Fulfill				{% if sigreq.isRESPASatisfied %}Document Package Requested - Print and Mail Now{% else %}Disclosures NOT Viewed - Print and Mail Now{% endif %} {{maybeLoanNumberBrackets}}	
Sent to DSI Print Queue				Document Package Printed {{maybeLoanNumberBrackets}}	
Request Paper Copy				eSign Paper Copy Request from {{signer.user.TitleCaseName}} {{maybeLoanNumberBrackets}}	
Complete Sigreq				{% if sigreq.status.code == 'SIGNED' %} Signature Request Completed {% else %} Document Review Request Completed {% endif %} {{maybeLoanNumberBrackets}}	
Send Invitation			Sender	Invitation Confirmation {{maybeLoanNumberBrackets}}	
Send Invitation	Standard		Sender	Invitation Confirmation	
Sigreq Consented				Electronic Consent Obtained {{maybeLoanNumberBrackets}}	
Document Mailed				Document Package Mailed {{maybeLoanNumberBrackets}}	

DELL



Lender Experience

Disable Preview Mode Toggle

Set "Disable Preview Mode Toggle" to Yes.

The screenshot shows the 'eSign Console - Stephen Truitt' interface. The main heading is 'LENDER NAME (100AB)'. Below this, there are several sections of configuration options:

- System**
 - Closing Agent Portal: Yes
 - Allow Email Change: Yes
 - Multi Auth Enabled: No
 - Allow Borrower Comments: Yes
 - Allow signer to request paper copy: Yes
 - Notification Level: Level 3
 - Name Capitalization: Yes
 - Remove option to Withdraw Consent: No
 - Disable Preview Mode Toggle: Yes** (highlighted with a green box and a blue arrow pointing to it from the instruction above)
- General**
 - Time Zone: America/Los_Angeles
- Participants**

The interface also features a top navigation bar with links for Scheduler, Monitoring, Accounts, eSign Requests, Create Request, Search, and Account. A DELL logo is visible at the bottom center of the screen.

The Settlement Agent will no longer be able to sign until the day of closing.



Lender Experience

Documents

The Documents tab lists the documents prepared for eSignature.

The screenshot displays the 'eSign Console - Steve Truitt' interface. At the top, there are navigation tabs: Scheduler, Monitoring, Accounts, eSign Requests, Create Request, Search, and Account. Below this is a summary section with loan details:

- Loan #: 07132022002
- Primary Name: John Smith
- Type: EClosing
- Package Id: 562064
- Worksheet #: 2732 (Version : 1)
- Closing Date: 7/14/22
- Lender: Steve Truitt
- DSI TEST LENDER (SALES) (100SALES)
- struitt@docmagic.com
- (800)649-1362
- Status: New (Active)
- Documents: 15 (57 total pages)
- Signers: 2
- Expires: N/A (Requires: Primary)
- Signatures: Y (Ink Sign)

Below the summary are tabs: Details, Documents, Documents Received, Emails, and Versions. The 'Documents' tab is selected and highlighted with a blue box. A blue arrow points from the text above to the plus icon in the Documents tab header.

The main area shows a table of documents:

Document Name	ClickSign	Page(s)	Mark(s)	Signer(s)	Completed	Sigreq	Document Id Document Id	Filename	Delete	Operation
1 Borrower's Certification, Authorization and Consent	✓	2	1	1			4951135 4962470	bcac.msc.xml		
2 Multistate Fixed Rate Note	✓	0/4	1	1			4951136 4962471	us3200.not.xml		Mark as Complete
3 New Jersey Mortgage	✓	0/19	1	1			4951137 4962472	nj3031.mtg.xml		Mark as Complete
4 Uniform Residential Loan Application	✓	7	1	1			4951138 4962473	urla.msc.xml		
5 Uniform Residential Loan Application - Lender Loan Information	✓	2	0	0	✓		4951139 4962474	urlali.msc.xml		
6 Specific Closing Instructions	✓	3	4	2			4951140 4962475	sci.msc.xml		
7 Hazard Insurance Authorization and Requirements	✓	2	1	1			4951141 4962476	hazard8.lsr.xml		
8 IVES Request Transcript of Tax Return	✓	2	2	1			4951142 4962477	4506c.msc.xml		
9 New Jersey Assignment of Mortgage	✓	0/3	0	0	✓		4951143 4962478	nj.aom.xml		
10 Closing Disclosure	✓	5	1	1			4951144 4962479	cd.dsc.xml		
11 Customer Identification Verification	✓	2	0	0	✓		4951145 4962480	civ.msc.xml		
12 Initial Escrow Account Disclosure Statement	✓	2	1	1			4951146 4962481	leads.msc.xml		
13 New Jersey Initial Tax Authorization Notice	✓	1	0	0	✓		4951147 4962482	njtan.msc.xml		
14 New Jersey Private Well Testing Act Certification	✓	1	1	1			4951148 4962483	njpw.t.msc.xml		
15 Signature Affidavit and AKA Statement	✓	0/2	1	1			4951149 4962484	saakas.msc.xml		Mark as Complete

At the bottom of the table, there is an 'Add Internal Note' button and 'Cancel Request' and 'Delete Request' buttons.

If you want to add a one-off document to this specific loan, you can do so by clicking this plus button here.



Lender Experience

Documents

Choose the document that you want to upload, then hit Submit.

The screenshot displays the 'eSign Console - Steve Truitt' interface. At the top, there are navigation tabs: Scheduler, Monitoring, Accounts, eSign Requests, Create Request, Search, and Account. Below this, a summary section shows loan details: Loan # 07132022002, Primary Name John Smith, Type EClosing, Package Id 562064, Worksheet # 2732 (Version : 1), and Closing Date 7/14/22. Lender information includes Steve Truitt, DSI TEST LENDER (SALES) (100SALES), struitt@docmagic.com, and (800)649-1362. Status is New (Active), Documents: 15 (57 total pages), Signers: 2, Expires: N/A (Requires: Primary), and Signatures: Y (Ink Sign).

The 'Documents' tab is active, showing a list of documents. A modal window titled 'Upload a new document' is open, with a text input field containing 'Welcome1.pdf' and a 'Browse' button. A blue arrow points from the instruction text to the 'Submit' button in the modal. The modal also has 'Cancel' and 'Submit' buttons.

Below the modal, a table lists documents with columns for Document Name, Document, and various status indicators. The table includes 15 rows of document information, such as 'Borrower's Certification, Authoriza...', 'Multistate Fixed Rate Note', 'New Jersey Mortgage', etc.

Document Name	Document	...
1 Borrower's Certification, Authoriza	Document	Welcome1.pdf
2 Multistate Fixed Rate Note		
3 New Jersey Mortgage		
4 Uniform Residential Loan Applicat		
5 Uniform Residential Loan Applicat		
6 Specific Closing Instructions		
7 Hazard Insurance Authorization ar		
8 IVES Request for Transcript of Tax Return		
9 New Jersey Assignment of Mortgage		
10 Closing Disclosure		
11 Customer Identification Verification		
12 Initial Escrow Account Disclosure Statement		
13 New Jersey Initial Tax Authorization Notice		
14 New Jersey Private Well Testing Act Certification		
15 Signature Affidavit and AKA Statement		

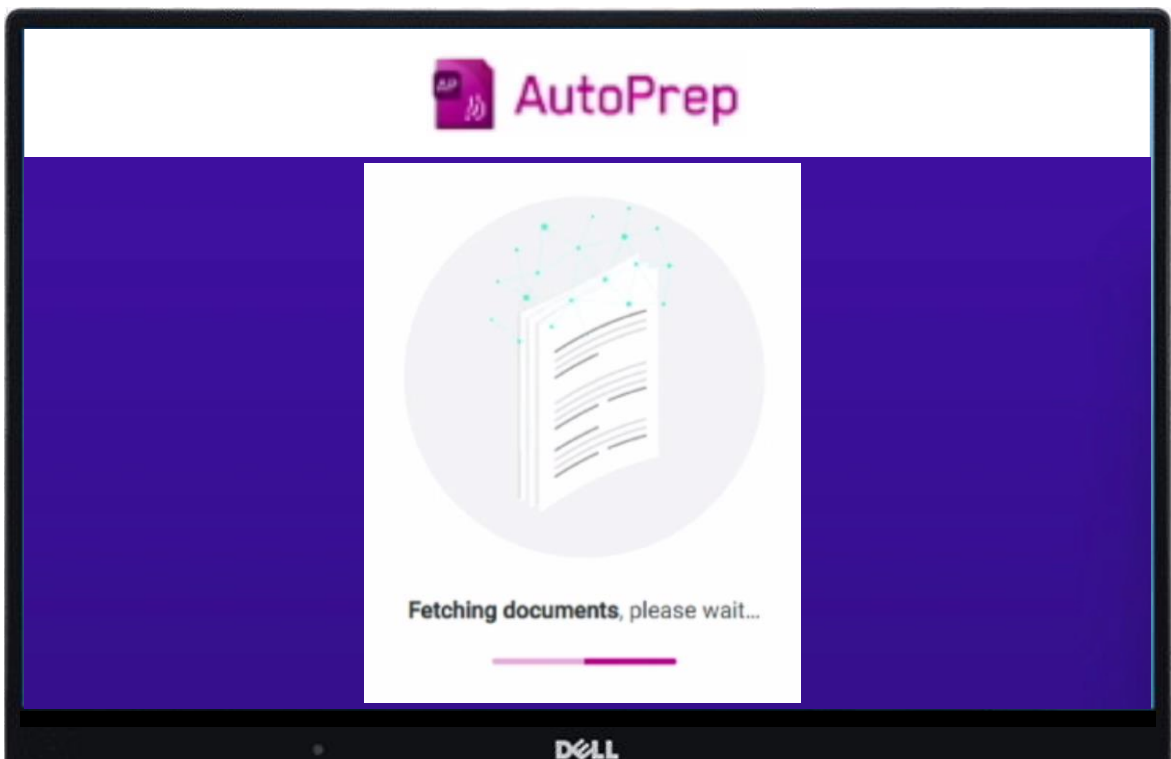
At the bottom of the console, there are buttons for 'Add Internal Note', 'Cancel Request', and 'Delete Request'. The Dell logo is visible at the bottom center of the screen.



Lender Experience

AutoPrep™

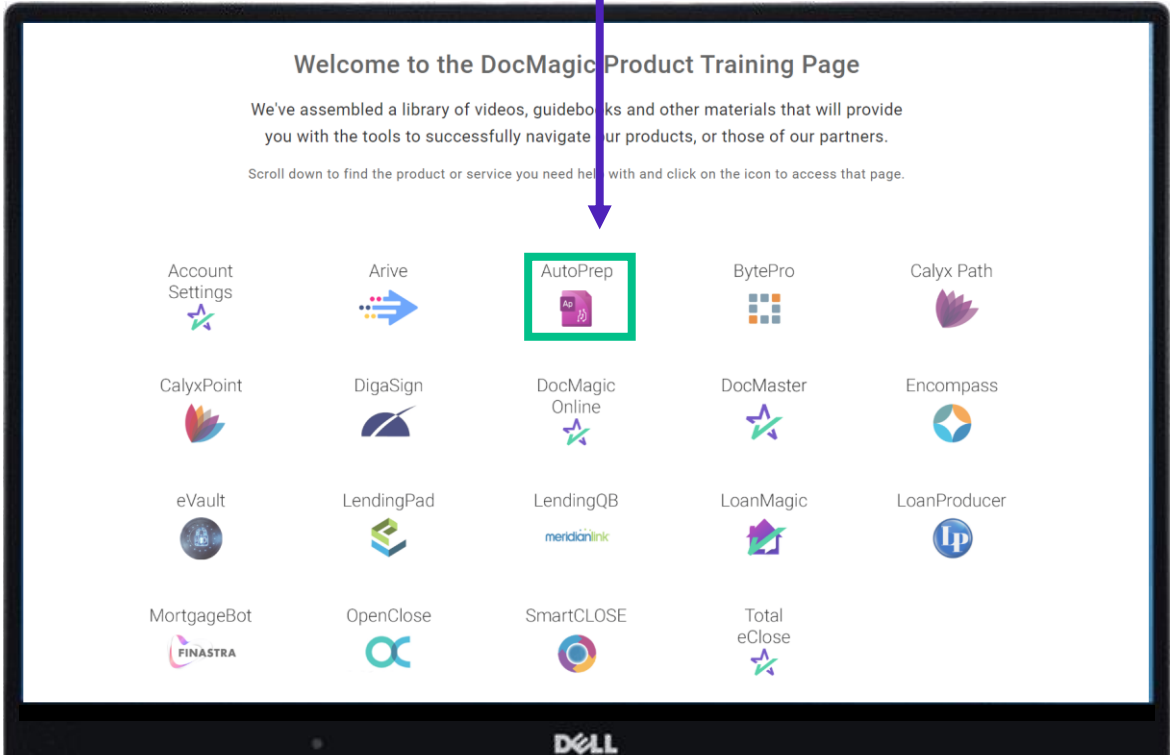
This will activate our AutoPrep™ sequence where the document is scanned and automatically tagged for eSignature by our system.



Lender Experience

AutoPrep™

You can view an entire rundown of AutoPrep™ and its features on our [Product Training Page](#).



Lender Experience

Documents

Once added, the document will appear at the bottom of the page and be included with the other documents when the participants go to sign it.

eSign Console - Steve Truitt

Scheduler Monitoring Accounts eSign Requests Create Request Search Account

Loan #: 071320220002
Primary Name: John Smith
Type: EClosing
Package Id: 562064
Worksheet #: 2732 (Version : 1)
Closing Date: 7/14/22

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

Status: New (Active)
Documents: 16 (58 total pages)
Signers: 2
Expires: N/A (Requires: Primary)
Signatures: Y (Ink Sign)

Details Documents Documents Received EMail Versions

Documents

Document Name	ClickSign	Page(s)	Mark(s)	Signer(s)	Completed	Sigreq	Document Id Document Id	Filename	Delete	Operation
1 Borrower's Certification, Authorization and Consent	✓	2	1	1			4951135 4962470	bcac.msc.xml		
2 Multistate Fixed Rate Note		0/4	1	1			4951136 4962471	us3200 not.xml		Mark as Complete
3 New Jersey Mortgage		0/19	1	1			4951137 4962472	nj3031.mtg.xml		Mark as Complete
4 Uniform Residential Loan Application	✓	7	1	1			4951138 4962473	urla.msc.xml		
5 Uniform Residential Loan Application - Lender Loan Information	✓	2	0	0	✓		4951139 4962474	urlall.msc.xml		
6 Specific Closing Instructions	✓	3	4	2			4951140 4962475	sci.msc.xml		
7 Hazard Insurance Authorization and Requirements	✓	2	1	1			4951141 4962476	hazard8.lsr.xml		
8 IVES Request for Transcript of Tax Return	✓	2	2	1			4951142 4962477	4506c.msc.xml		
9 New Jersey Assignment of Mortgage	✓	0/3	0	0	✓		4951143 4962478	nj.aom.xml		
10 Closing Disclosure	✓	5	1	1			4951144 4962479	cd.dsc.xml		
11 Customer Identification Verification	✓	2	0	0	✓		4951145 4962480	civ.msc.xml		
12 Initial Escrow Account Disclosure Statement	✓	2	1	1			4951146 4962481	leads.msc.xml		
13 New Jersey Initial Tax Authorization Notice	✓	1	0	0	✓		4951147 4962482	njitan.msc.xml		
14 New Jersey Private Well Testing Act Certification	✓	1	1	1			4951148 4962483	njpwat.msc.xml		
15 Signature Affidavit and AKA Statement	✓	0/2	1	1			4951149 4962484	saakas.msc.xml		Mark as Complete
16 Welcome!	✓	1	0	0	✓		4951554 4962889	Welcomet.pdf		

Add Internal Note

Cancel Request Delete Request



Lender Experience

Tagging Documents

To manually tag a document (add signatures or text fields, etc.) click on the pencil icon.

The screenshot displays the eSign Console interface for a loan. The top navigation bar includes 'Scheduler', 'Monitoring', 'Accounts', 'eSign Requests', 'Create Request', 'Search', and 'Account'. The main header shows 'eSign Console - Steve Truitt'. Below this, loan details are provided: Loan # 0713 0220002, Lender Steve Truitt, Status New (Active), Primary Name John Smith, Lender DSI TEST LENDER (SALES) (100SALES), Documents 16 (58 total pages), Type EClosing, Lender struitt@docmagic.com, Signers 2, Package Id 56204, Expires N/A (Requires: Primary), Worksheet # 2732 (Version : 1), Signatures Y (Ink Sign), Closing Date 7/14/12.

The 'Documents' tab is selected, showing a list of documents. A pencil icon is highlighted in the toolbar above the list. The document list table is as follows:

Document Name	ClickSign	Page(s)	Mark(s)	Signer(s)	Completed	Sigreq	Document Id Document Id	Filename	Delete	Operation
1 Borrower's Certification, Authorization and Consent	✓	2	1	1			4951135 4962470	bcac.msc.xml		
2 Multistate Fixed Rate Note		0/4	1	1			4951136 4962471	us3200 not.xml		Mark as Complete
3 New Jersey Mortgage		0/19	1	1			4951137 4962472	nj3031.mtg.xml		Mark as Complete
4 Uniform Residential Loan Application	✓	7	1	1			4951138 4962473	urla.msc.xml		
5 Uniform Residential Loan Application - Lender Loan Information	✓	2	0	0	✓		4951139 4962474	urlali.msc.xml		
6 Specific Closing Instructions	✓	3	4	2			4951140 4962475	sci.msc.xml		
7 Hazard Insurance Authorization and Requirements	✓	2	1	1			4951141 4962476	hazard8.lsr.xml		
8 IVES Request for Transcript of Tax Return	✓	2	2	1			4951142 4962477	4506c.msc.xml		
9 New Jersey Assignment of Mortgage		0/3	0	0	✓		4951143 4962478	nj.aom.xml		
10 Closing Disclosure	✓	5	1	1			4951144 4962479	cd.dsc.xml		
11 Customer Identification Verification	✓	2	0	0	✓		4951145 4962480	civ.msc.xml		
12 Initial Escrow Account Disclosure Statement	✓	2	1	1			4951146 4962481	leads.msc.xml		
13 New Jersey Initial Tax Authorization Notice	✓	1	0	0	✓		4951147 4962482	njitan.msc.xml		
14 New Jersey Private Well Testing Act Certification	✓	1	1	1			4951148 4962483	njpwat.msc.xml		
15 Signature Affidavit and AKA Statement		0/2	1	1			4951149 4962484	saakas.msc.xml		Mark as Complete
16 Welcome!	✓	1	0	0	✓		4951554 4962889	Welcome! pdf		

Buttons at the bottom include 'Add Internal Note', 'Cancel Request', and 'Delete Request'.

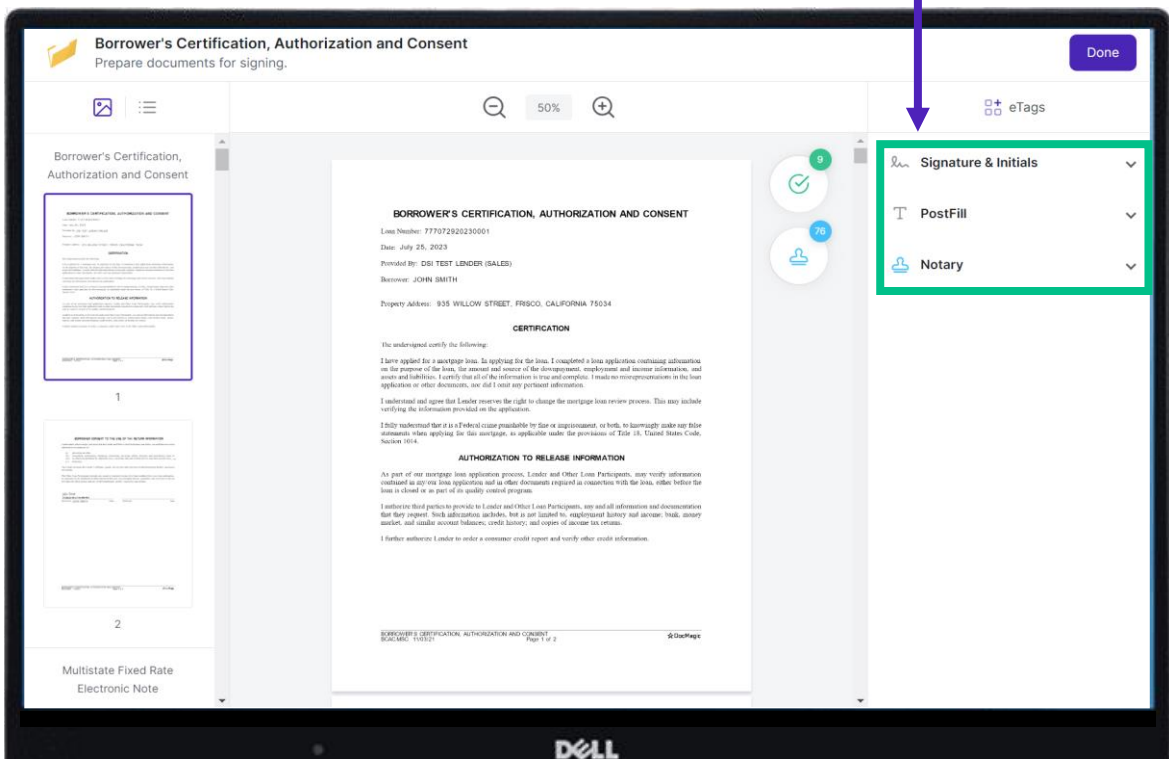
We highly recommend that you check all the tags to make sure that all documents are tagged correctly.



Lender Experience

Tagging Documents

You can add signatures, initials, post-fill boxes and notary information.



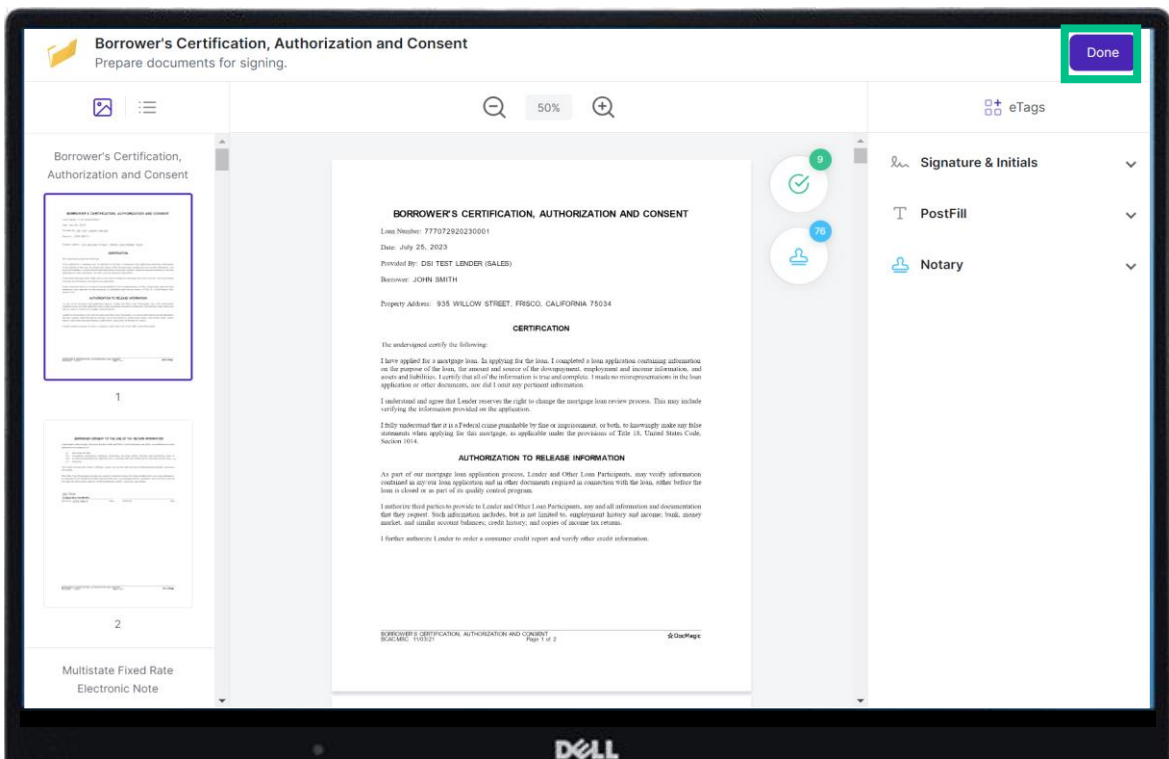
Click [here](#) for a comprehensive Document Editor guide. You can also access this guide at any time by going to our [Product Training Page](#) → Total eClose → Notary → Bonus Materials



Lender Experience

Tagging Documents

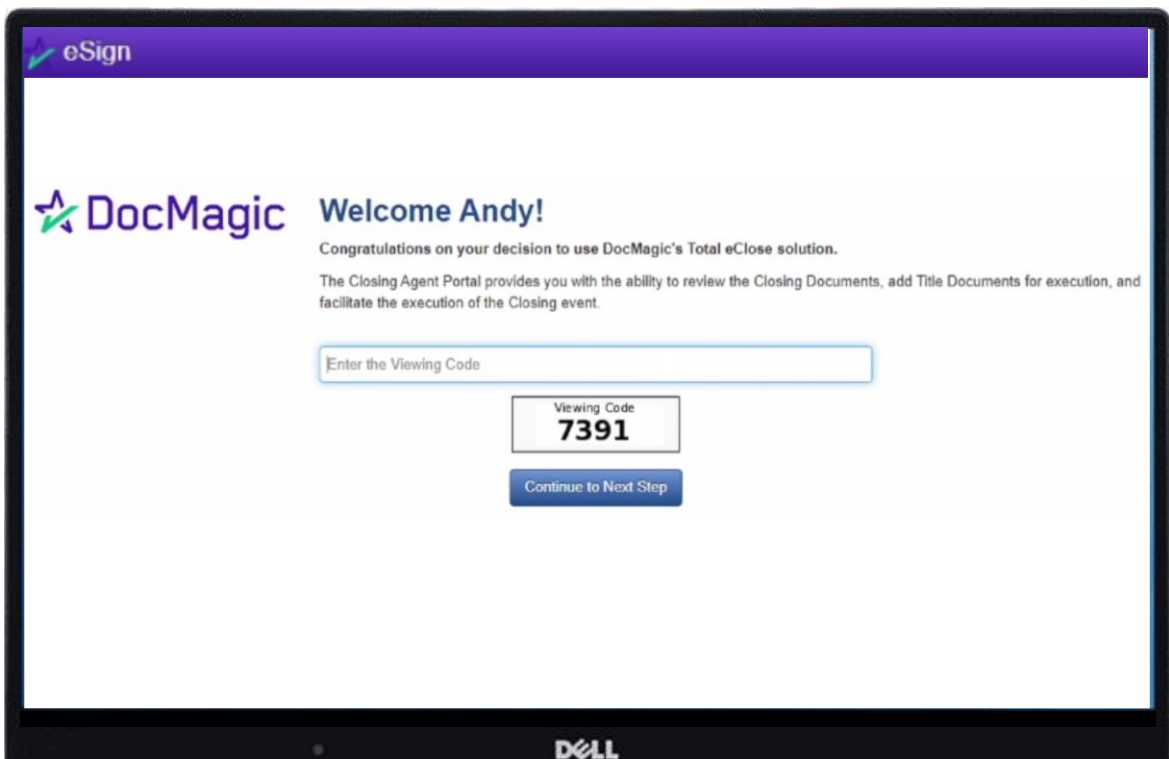
When finished, click "Done" to return to the portal.



Lender Experience

Participants Sign

Next, the participants will enter their respective signing rooms to sign the documents.



Lender Experience

Settlement Agent Portal

The Settlement Agents will arrive at their Settlement Agent Portal to make sure the process is smooth and complete.

DocMagic eClose Console (Settlement Agent) Andy ▾

LOAN Loan #: 070620220001
Primary Borrower: John Smith
Type: EClosing
Package ID: 558436
Worksheet #: 2704 (Version: 1)

LENDER
Company: DSI TEST LENDER (SALES)
Contact: Steve Truitt
Email: struitt@docmagic.com
Phone: (800) 649-1362

COUNTDOWN TO CLOSING
DAYS: - HOURS: - MINUTES: - SECONDS: -
Date: Jul 6, 2022 (Wed) Time: 12:00am PDT

[Details](#) [eJournal](#) [Action Log](#)

Signers (3)

#	Signer Name / Email	Role	KBA / Status	ID Verify / Status	Status	eSign
1	John Smith struitt@docmagic.com	Borrower			● Ready to Sign	Open Signing Room
2	Andy Agent struitt@docmagic.com	Settlement Agent			● Ready to Sign	Open Signing Room
3	Stephen Truitt struitt221@gmail.com	Other				Open Signing Room

Documents (17) [Print](#) [Edit](#) [New](#) [Share](#) [Refresh](#) Preview Mode OFF

#	eSign Enabled	Page(s)	Signer(s)	Completed
1	Borrower's Certification, Authorization and Consent	2	1	✓
2	Uniform Residential Loan Application	7	1	✓
3	Uniform Residential Loan Application - Lender Loan Information	2	0	✓

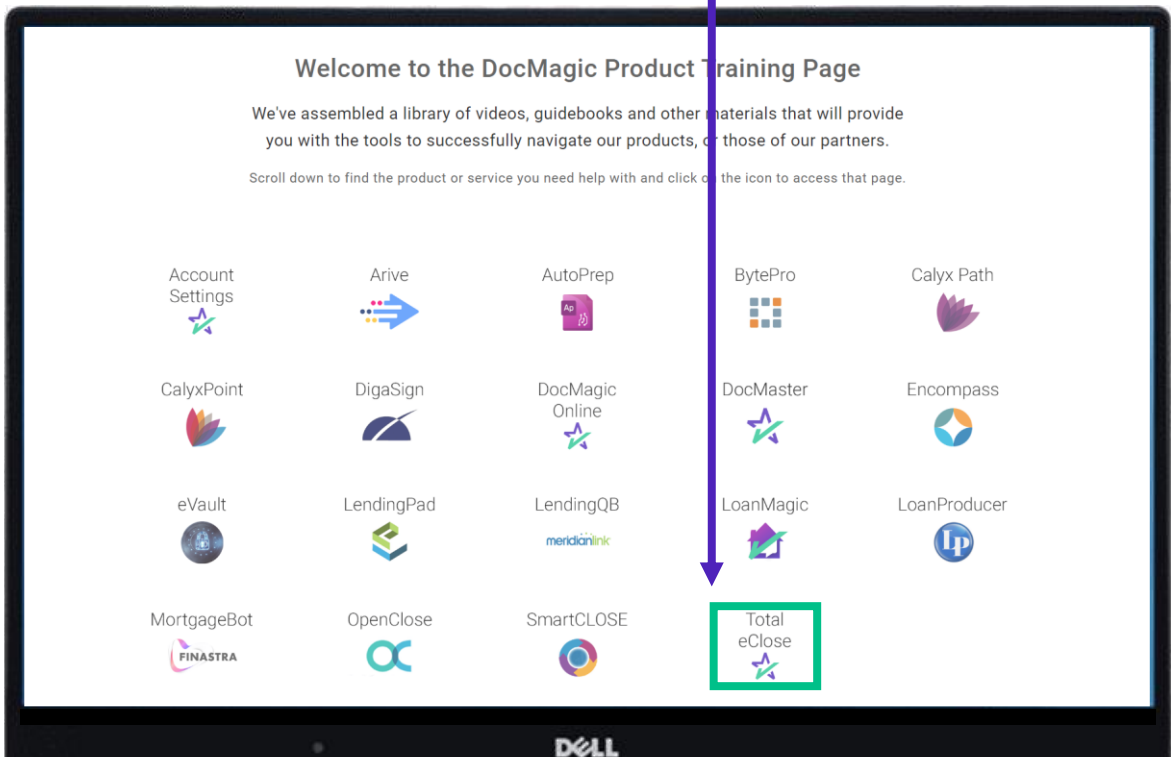
DELL



Lender Experience

Settlement Agent Training

You can view a training on the Settlement Agent experience right here in the Total eClose widget on our Product Training Page.



Lender Experience

Borrower Signature

The borrower will also sign their documents in our eSign experience.

The screenshot shows the DocMagic eSign interface for a borrower signature. The interface is displayed on a Dell monitor. At the top, the DocMagic logo is on the left, and navigation buttons for Review, Ink, Sign, and Completed are in the center. The user's name, Michael Sample, is shown in the top right corner. The main content area is titled "California Acknowledgment Of Receipt Of Loan Estimate" and contains the following text:

Date: MARCH 15, 2020
Borrower(s): Michael Sample
Property Address: 1000 Property Street
Torrance, California 90501

The undersigned ("you" or "yours") hereby acknowledge receipt of a "Loan Estimate." This Loan Estimate does not constitute a loan commitment. You may check the license status of the broker and/or loan officer by calling the California Department of Real Estate's license information telephone number at (877) 373-4542 or by visiting DRE's website at www.dre.ca.gov.

By signing below, I/we acknowledge that I/we have read and received a copy of this document.

Below the text is a "Sign" button and a signature line for Michael Sample. At the bottom of the page, there are "Previous", "Sign", and "Next" buttons. The DocMagic logo is also present in the bottom right corner of the page.

On the right side of the interface, there is a "Signatures to Go" section with a list of documents and their status:

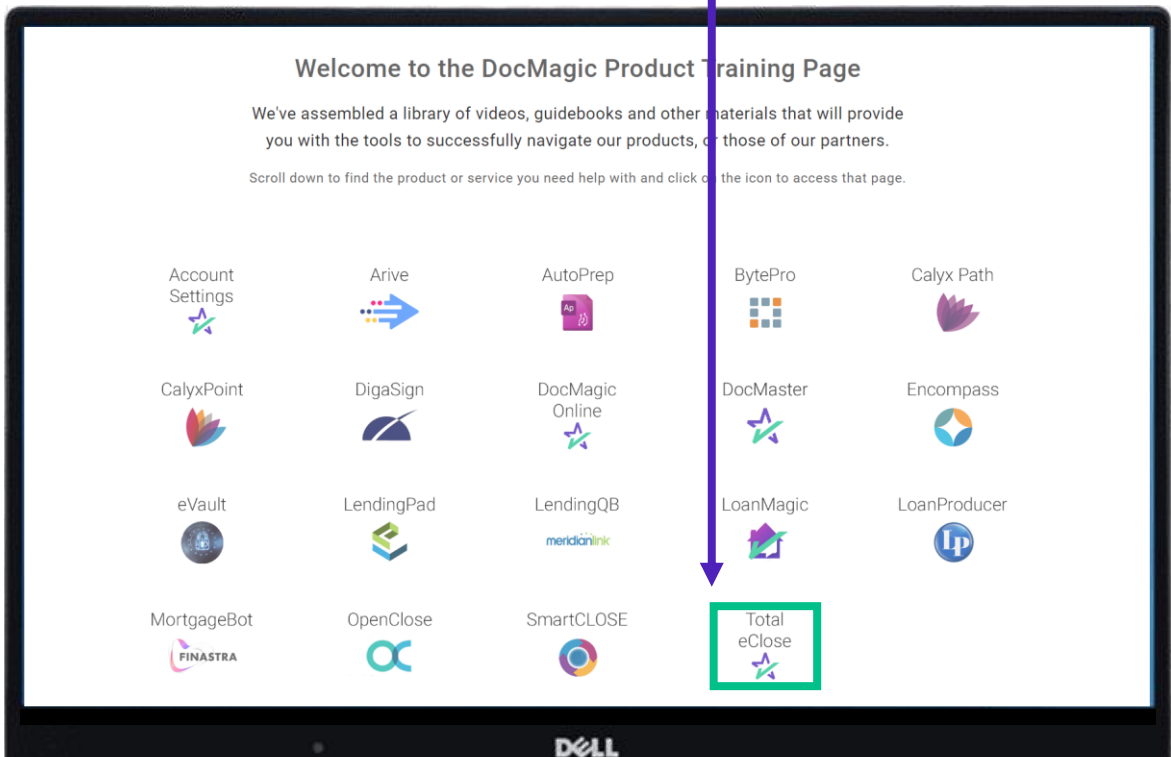
- All documents
- Addendum To Loan Application ✓
- Loan Estimate ✓
- Borrower's Certification And Authoriza... ✓
- Borrower Consent To The Use Of Tax R... ✓
- Ives Request For Transcript Of Tax Ret... ✓
- Authorization For The Social Security ... ✓
- California Acknowledgment Of Receipt ... /
- California Automated Valuation Model ... /
- California Copies Of Signed Documents /
- California Fair Lending Notice /
- California Hazard Insurance Disclosure /
- Fair Lending Notice /
- Federal Equal Credit Opportunity Act N... /
- Housing Counselors Near You ⊖
- Important Information About Procedur... /
- Settlement Services Provider List /
- Your Home Loan Toolkit ⊖



Lender Experience

Borrower Experience Training

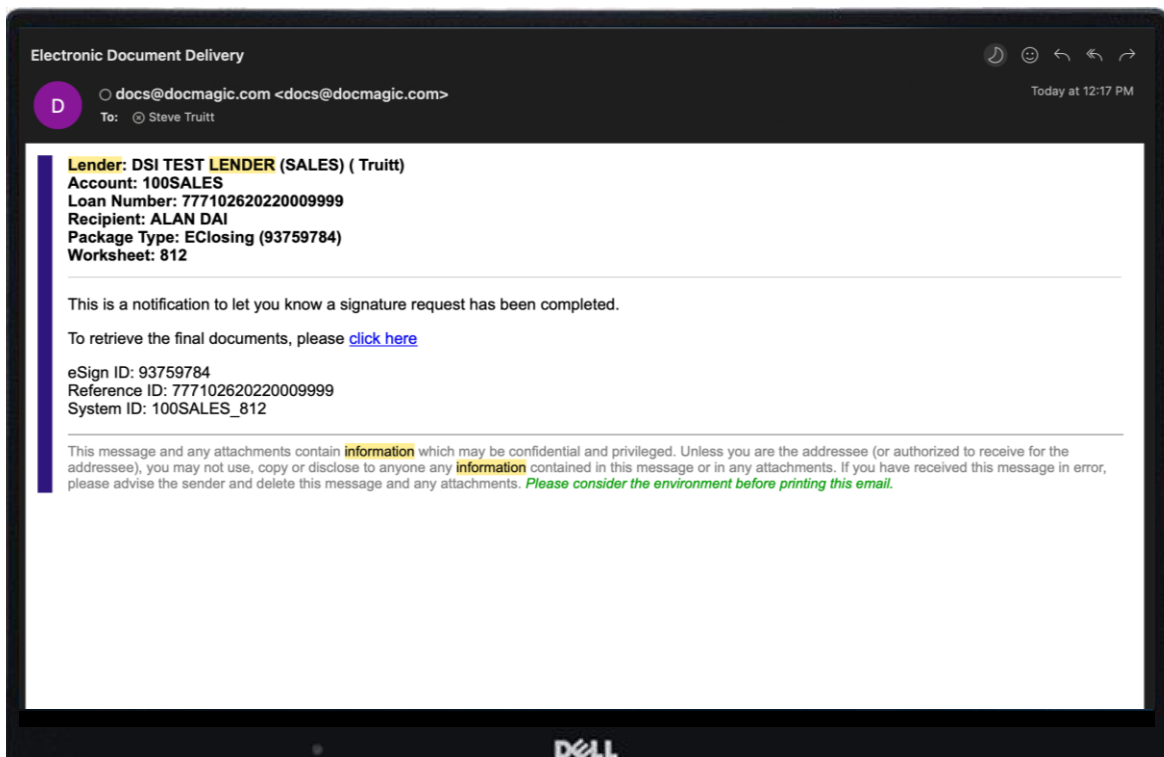
There's also a review of the borrower experience in the Total eClose section.



Lender Experience

Borrower Experience Training

You'll receive email confirmations along the way, as well as confirmation that all signatures have been obtained and the process is complete.



Lender Experience

Return to the eSign Console

Once complete, you'll be alerted via e-mail, and you can return to the eSign console where you'll see verification that all signatures have been collected.

The screenshot displays the eSign Console interface for a loan. The top navigation bar includes 'Scheduler', 'Monitoring', 'Accounts', 'eSign Requests', 'Create Request', 'Search', and 'Account'. The main content area is divided into several sections:

- Loan Details:** Loan #: 070620220001, Primary Name: John Smith, Type: EClosing, Package Id: 558436, Worksheet #: 2704 (Version : 1), Closing Date: 7/6/22. Lender: Steve Truitt, DSI TEST LENDER (SALES) (100SALES), struitt@docmagic.com, (800)649-1362. Status: Signed (Active), Documents: 17 (66 total pages), Signers: 3, Expires: N/A (Requires: Primary), Signatures: Y (Ink Sign).
- Participants Table:** A table with columns: #, Name/Email, Role, Created, Started, Consented, Viewed, Completed, Declined, Links, and Fix. A green box highlights the 'Created' through 'Completed' columns for the first three participants.
- Action Log Table:** A table with columns: Date, User, IP Address, and Description, showing a sequence of events from 7/6/22 11:47 AM to 7/6/22 11:54 AM.

#	Name/Email	Role	Created	Started	Consented	Viewed	Completed	Declined	Links	Fix
1	John Smith struitt@docmagic.com	Borrower	7/6/22 11:47 AM	7/6/22 11:54 AM	7/6/22 11:54 AM	7/6/22 11:54 AM	7/6/22 11:57 AM		Send Email Sign Documents	4506-C
3	Andy Agent struitt@docmagic.com	Settlement Agent	7/6/22 11:47 AM	7/6/22 11:53 AM	7/6/22 11:53 AM	7/6/22 11:53 AM	7/6/22 11:54 AM		Send Email Agent Portal	
4	Stephen Truitt struitt221@gmail.com	Other	7/6/22 11:52 AM						Send Email	

Date	User	IP Address	Description
7/6/22 11:47 AM	System User		eSign event created
7/6/22 11:47 AM	John Smith		Invitation sent to struitt@docmagic.com
7/6/22 11:47 AM	Andy Agent		Invitation sent to struitt@docmagic.com
7/6/22 11:51 AM	Steve Truitt		Document batch upload completed
7/6/22 11:52 AM	Steve Truitt		Stephen Truitt (struitt221@gmail.com) added as Other
7/6/22 11:52 AM	Stephen Truitt		Invitation sent to struitt221@gmail.com
7/6/22 11:53 AM	System User		Preview Mode was enabled
7/6/22 11:53 AM	System User		Preview Mode was disabled
7/6/22 11:53 AM	Andy Agent		Consented to DocMagic eSign
7/6/22 11:53 AM	Andy Agent		eSign event started
7/6/22 11:53 AM	Andy Agent		Closing Documents version 1 prepared on July 06, 2022, 11:47 AM PDT displayed
7/6/22 11:54 AM	Andy Agent		Approved electronic representation of signature



Lender Experience

Return to the eSign Console

You can review the process.

The screenshot displays the 'eSign Console - Steve Truitt' interface. At the top, there are navigation tabs: Scheduler, Monitoring, Accounts, eSign Requests, Create Request, Search, and Account. The main content area is divided into two columns. The left column shows loan details: Loan # 070620220001, Primary Name John Smith, Type EClosing, Package Id 558436, Worksheet # 2704 (Version : 1), and Closing Date 7/6/22. The right column shows lender information: Lender Steve Truitt, DSI TEST LENDER (SALES) (100SALES), struitt@docmagic.com, (800)649-1362, and status Signed (Active). Below this, there are tabs for Details, Documents, Documents Received, EMail, and Versions. The 'Participants' section contains a table with columns for #, Name/Email, Role, Created, Started, Consented, Viewed, Completed, Declined, Links, and Fix. The 'Action Log' section contains a table with columns for Date, User, IP Address, and Description.

#	Name/Email	Role	Created	Started	Consented	Viewed	Completed	Declined	Links	Fix
1	John Smith struitt@docmagic.com	Borrower	7/6/22 11:47 AM	7/6/22 11:54 AM	7/6/22 11:54 AM	7/6/22 11:54 AM	7/6/22 11:57 AM		Send Email Sign Documents	4506-C
3	Andy Agent struitt@docmagic.com	Settlement Agent	7/6/22 11:47 AM	7/6/22 11:53 AM	7/6/22 11:53 AM	7/6/22 11:53 AM	7/6/22 11:54 AM		Send Email Agent Portal	
4	Stephen Truitt struitt221@gmail.com	Other	7/6/22 11:52 AM						Send Email	

Date	User	IP Address	Description
7/6/22 11:47 AM	System User		eSign event created
7/6/22 11:47 AM	John Smith		Invitation sent to struitt@docmagic.com
7/6/22 11:47 AM	Andy Agent		Invitation sent to struitt@docmagic.com
7/6/22 11:51 AM	Steve Truitt		Document batch upload completed
7/6/22 11:52 AM	Steve Truitt		Stephen Truitt (struitt221@gmail.com) added as Other
7/6/22 11:52 AM	Stephen Truitt		Invitation sent to struitt221@gmail.com
7/6/22 11:53 AM	System User		Preview Mode was enabled
7/6/22 11:53 AM	System User		Preview Mode was disabled
7/6/22 11:53 AM	Andy Agent		Consented to DocMagic eSign
7/6/22 11:53 AM	Andy Agent		eSign event started
7/6/22 11:53 AM	Andy Agent		Closing Documents version 1 prepared on July 06, 2022, 11:47 AM PDT displayed
7/6/22 11:54 AM	Andy Agent		Approved electronic representation of signature

You can also review the Action Log.



Lender Experience

Return to the eSign Console

You can print out the entire document set with signatures.

eSign Console - Steve Truitt Scheduler Monitoring Accounts eSign Requests Create Request Search Account

Loan #: 070620220001 Lender: Steve Truitt Status: Signed (Active)
Primary Name: John Smith DSI TEST LENDER (SALES) (100SALES) Documents: 17 (66 total pages)
Type: EClosing struitt@docmagic.com Signers: 3
Package Id: 558436 (800)649-1362 Expires: N/A (Requires: Primary)
Worksheet #: 2704 (Version : 1) Signatures: Y (Ink Sign)
Closing Date: 7/6/22

Details Documents Documents Received EMails Versions

Participants

#	Name/Email	Role	Created	Started	Consented	Viewed	Completed	Declined	Links	Fix
1	John Smith struitt@docmagic.com	Borrower	7/6/22 11:47 AM	7/6/22 11:54 AM	7/6/22 11:54 AM	7/6/22 11:54 AM	7/6/22 11:57 AM		Send Email Sign Documents	4506-C
3	Andy Agent struitt@docmagic.com	Settlement Agent	7/6/22 11:47 AM	7/6/22 11:53 AM	7/6/22 11:53 AM	7/6/22 11:53 AM	7/6/22 11:54 AM		Send Email Agent Portal	
4	Stephen Truitt struitt221@gmail.com	Other	7/6/22 11:52 AM						Send Email	

Action Log

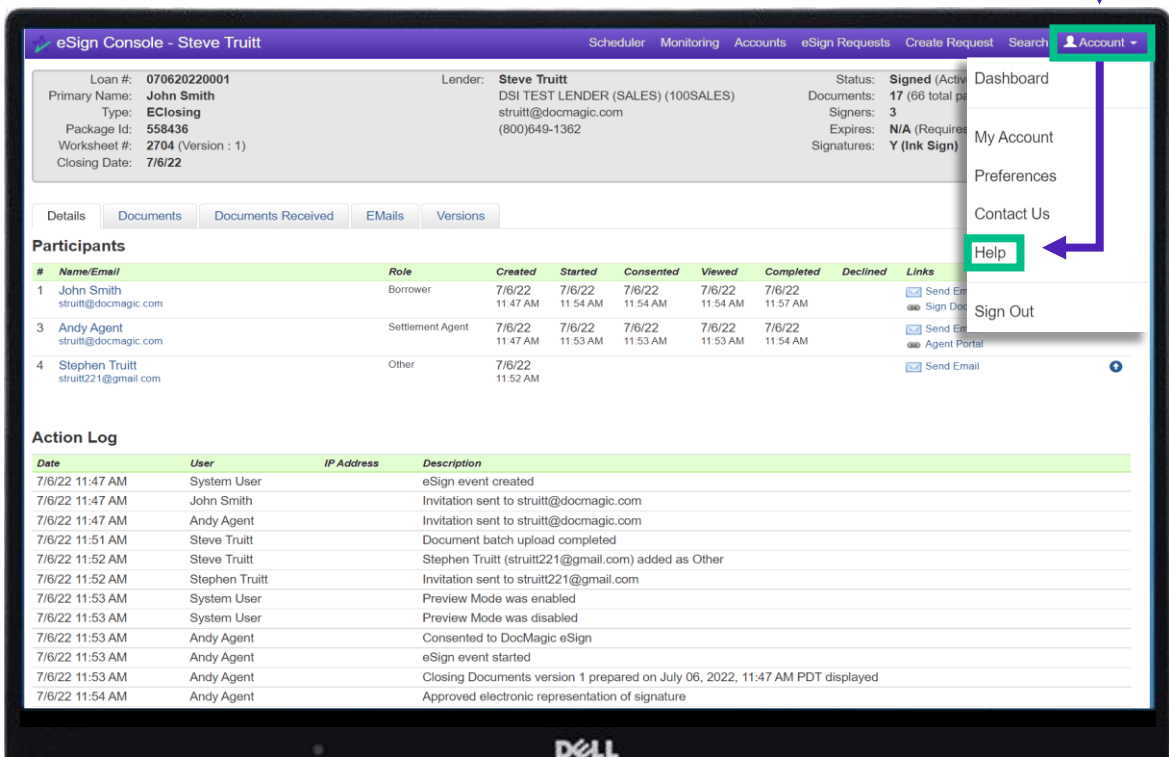
Date	User	IP Address	Description
7/6/22 11:47 AM	System User		eSign event created
7/6/22 11:47 AM	John Smith		Invitation sent to struitt@docmagic.com
7/6/22 11:47 AM	Andy Agent		Invitation sent to struitt@docmagic.com
7/6/22 11:51 AM	Steve Truitt		Document batch upload completed
7/6/22 11:52 AM	Steve Truitt		Stephen Truitt (struitt221@gmail.com) added as Other
7/6/22 11:52 AM	Stephen Truitt		Invitation sent to struitt221@gmail.com
7/6/22 11:53 AM	System User		Preview Mode was enabled
7/6/22 11:53 AM	System User		Preview Mode was disabled
7/6/22 11:53 AM	Andy Agent		Consented to DocMagic eSign
7/6/22 11:53 AM	Andy Agent		eSign event started
7/6/22 11:53 AM	Andy Agent		Closing Documents version 1 prepared on July 06, 2022, 11:47 AM PDT displayed
7/6/22 11:54 AM	Andy Agent		Approved electronic representation of signature



Lender Experience

Additional Resources

From the eSign Console, you can find a tutorial just like the one you're reading now. Just click Account, then Help.



The screenshot displays the eSign Console interface for a loan. The top navigation bar includes 'Scheduler', 'Monitoring', 'Accounts', 'eSign Requests', 'Create Request', 'Search', and 'Account'. The 'Account' dropdown menu is open, showing options: 'Dashboard', 'My Account', 'Preferences', 'Contact Us', 'Help', and 'Sign Out'. The 'Help' option is highlighted with a green box. A blue arrow points from the text above to the 'Help' option.

eSign Console - Steve Truitt

Loan #: 070620220001 | Lender: Steve Truitt | Status: Signed (Active)
Primary Name: John Smith | DSI TEST LENDER (SALES) (100SALES) | Documents: 17 (66 total pages)
Type: EClosing | struitt@docmagic.com | Signers: 3
Package Id: 558436 | (800)649-1362 | Expires: N/A (Requires Signature)
Worksheet #: 2704 (Version : 1) | Signatures: Y (Ink Sign)
Closing Date: 7/6/22

Details | Documents | Documents Received | EMail | Versions

Participants

#	Name/Email	Role	Created	Started	Consented	Viewed	Completed	Declined	Links
1	John Smith struitt@docmagic.com	Borrower	7/6/22 11:47 AM	7/6/22 11:54 AM	7/6/22 11:54 AM	7/6/22 11:54 AM	7/6/22 11:57 AM		Send Email Sign Doc
3	Andy Agent struitt@docmagic.com	Settlement Agent	7/6/22 11:47 AM	7/6/22 11:53 AM	7/6/22 11:53 AM	7/6/22 11:53 AM	7/6/22 11:54 AM		Send Email Agent Portal
4	Stephen Truitt struitt221@gmail.com	Other	7/6/22 11:52 AM						Send Email

Action Log

Date	User	IP Address	Description
7/6/22 11:47 AM	System User		eSign event created
7/6/22 11:47 AM	John Smith		Invitation sent to struitt@docmagic.com
7/6/22 11:47 AM	Andy Agent		Invitation sent to struitt@docmagic.com
7/6/22 11:51 AM	Steve Truitt		Document batch upload completed
7/6/22 11:52 AM	Steve Truitt		Stephen Truitt (struitt221@gmail.com) added as Other
7/6/22 11:52 AM	Stephen Truitt		Invitation sent to struitt221@gmail.com
7/6/22 11:53 AM	System User		Preview Mode was enabled
7/6/22 11:53 AM	System User		Preview Mode was disabled
7/6/22 11:53 AM	Andy Agent		Consented to DocMagic eSign
7/6/22 11:53 AM	Andy Agent		eSign event started
7/6/22 11:53 AM	Andy Agent		Closing Documents version 1 prepared on July 06, 2022, 11:47 AM PDT displayed
7/6/22 11:54 AM	Andy Agent		Approved electronic representation of signature

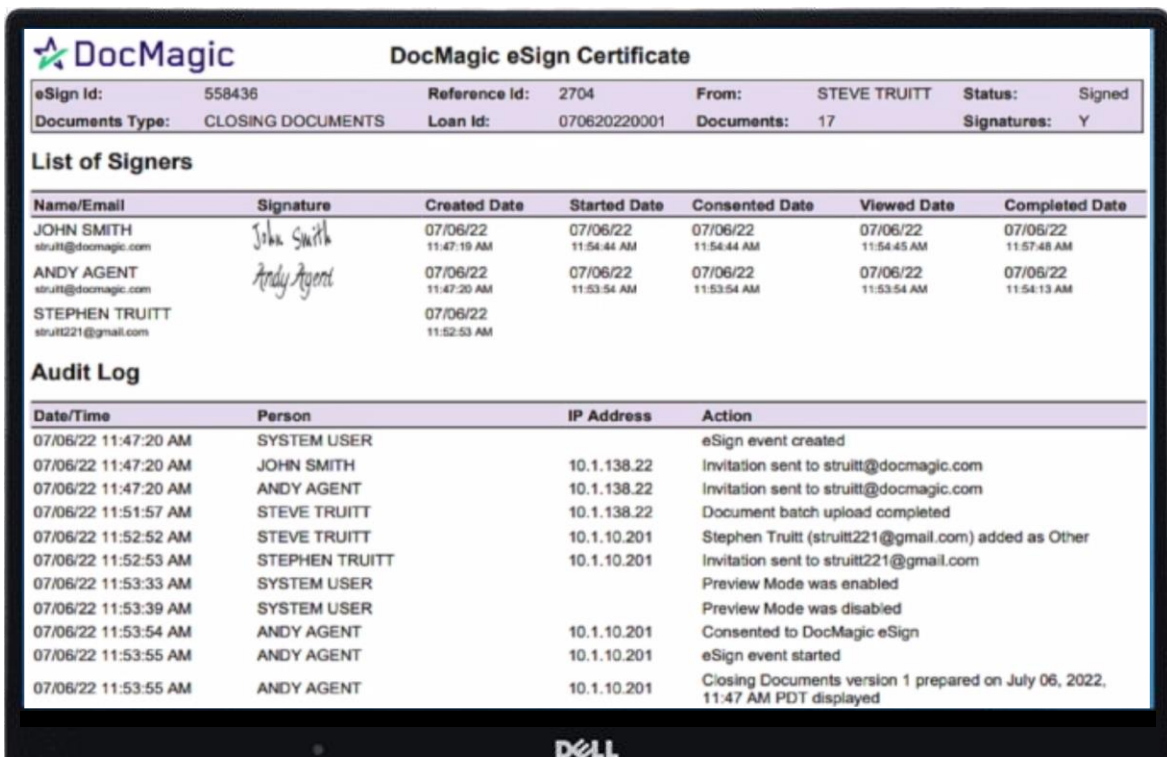
You can find more training materials on the eSign Console by visiting our [Product Training Page](#).



Lender Experience



Return to the eSign Console

This includes a certificate showing chosen signature representation, times of signings, and the Action Log.



The screenshot shows a DocMagic eSign Certificate on a Dell monitor. The certificate includes a header with the DocMagic logo and title, followed by a summary table of key information. Below this are two main sections: 'List of Signers' and 'Audit Log', each with a corresponding table of data.

eSign Id:	558436	Reference Id:	2704	From:	STEVE TRUITT	Status:	Signed
Documents Type:	CLOSING DOCUMENTS	Loan Id:	070620220001	Documents:	17	Signatures:	Y

Name/Email	Signature	Created Date	Started Date	Consented Date	Viewed Date	Completed Date
JOHN SMITH struitt@docmagic.com		07/06/22 11:47:19 AM	07/06/22 11:54:44 AM	07/06/22 11:54:44 AM	07/06/22 11:54:45 AM	07/06/22 11:57:48 AM
ANDY AGENT struitt@docmagic.com		07/06/22 11:47:20 AM	07/06/22 11:53:54 AM	07/06/22 11:53:54 AM	07/06/22 11:53:54 AM	07/06/22 11:54:13 AM
STEPHEN TRUITT struitt221@gmail.com		07/06/22 11:52:53 AM				

Date/Time	Person	IP Address	Action
07/06/22 11:47:20 AM	SYSTEM USER		eSign event created
07/06/22 11:47:20 AM	JOHN SMITH	10.1.138.22	Invitation sent to struitt@docmagic.com
07/06/22 11:47:20 AM	ANDY AGENT	10.1.138.22	Invitation sent to struitt@docmagic.com
07/06/22 11:51:57 AM	STEVE TRUITT	10.1.138.22	Document batch upload completed
07/06/22 11:52:52 AM	STEVE TRUITT	10.1.10.201	Stephen Truitt (struitt221@gmail.com) added as Other
07/06/22 11:52:53 AM	STEPHEN TRUITT	10.1.10.201	Invitation sent to struitt221@gmail.com
07/06/22 11:53:33 AM	SYSTEM USER		Preview Mode was enabled
07/06/22 11:53:39 AM	SYSTEM USER		Preview Mode was disabled
07/06/22 11:53:54 AM	ANDY AGENT	10.1.10.201	Consented to DocMagic eSign
07/06/22 11:53:55 AM	ANDY AGENT	10.1.10.201	eSign event started
07/06/22 11:53:55 AM	ANDY AGENT	10.1.10.201	Closing Documents version 1 prepared on July 06, 2022, 11:47 AM PDT displayed

We recommend that you print this out after all signatures are collected, as you will only have this loan document set in the portal for 90 days.

