

#### Introduction



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



#### DocMagic Online

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





#### Other LOS's

# You can find training for other LOS's on our <u>Product Training Page</u>.





Audit

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

DocMagic - Stephe File Edit Services T     Open Save     Data C      General Borrowers/S      General Informatic     Loan Stage     Loan Program     Alternate Lender     Transfer To     Broker Name     Origination     Loan Rep     Loan Purpose     Type     Lien Position     Loan Number     MIC / Agency #     Loan Identifiers	n Truitt (#1380) cols Help New import Copy Default apture ellers Property Terms n CLOSING ALL FIXED LOANS (DSI BROKER NAME LOAN REP CONVENTIONAL PURCHASE FIRST 777072320240001	Audit Details	APR Sect32 ir Audit harges/Fees Prep Channel Branch BRANC Business Use Same Lender Program Simultaneous? MERS # 999932 Case # Assigned	S       Provide         aids/Impounds       U         aids/Impounds       U         S3-2320240001-5         D≪LL	Add Add	Email Appraisal Delivery	03/01/2021 03/02/2021 03/02/2021 07/15/2024 03/08/2021 03/10/2021 03/10/2021 03/10/2021 03/15/2021 03/10/2021 03/10/2021 03/10/2021 05/10/2021 05/10/2021 05/10/2021	- × r r × Portal Con eSign LoanMagic Portal 1:00 AM ∨ PT ∨ 3 Days 12:00 AM ∨ PT ∨ 3 Jays 1:00 AM ∨ PT ∨ 3 Jays 1:00 AM ∨ PT ∨ 3.750 %
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#### Loan Detail Report

DocMagic's Audit function contains a robust Loan Detail Report, which is the hallmark of our compliance initiative. Click Details to view. This will open in your web browser.

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General Borrowers/Sellers Property	35 Warning issue	es have been detected.	1		7	DocMagic
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Alternate Lender	ARNING Is mortgage insurance	e required?	DataValidation		31 1:0	00 AM ~ PT ~
Transfer To	ARNING This is an MD Higher	Priced Mortgage Home Loan	HighCost-HPML	-	21	
Broker Name BROKER NAME	(COMAR 09.03.06.02	and COMAR 09.03.09.02)	-	•	31	3 Days
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Туре	creditor must establis	h an escrow account for the		2	31	
Lien Position FIRST	payment of property to	axes and creditor-required			51	
Loan Number 7770723202400	Section 1026.35(b)(1)	i).		6	12	
MIC / Agency #	ARNING Reg. Z prohibits paym on loan terms. includii	nents to loan originators based ng the interest rate. Make sure	Federal-TILA	~	31	
Loan identifiers		Go To Selected Audit				
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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 F	Report					🛠 DocMagic
Loan Number:	777072320240001		File ID	:	1380	
Borrower Name:	STEPHEN TRUITT		Client	Number:	100SALES	
Property Address:	123 MAIN STREET, INDIA	NAPOLIS MD 10012	Date o	of Report:	07/23/2024	
Transaction Deta	ails D	ata Validation	Compliance Audit			Collapse all 木
A DETAILS						
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Lender Name:	DSI TEST LENDER (S	SALES)	Transfer To:			
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Loan Number:	777072320240001	FHA/VA Case:		MERS	3 #:	9999353-2320240001-5
Loan Purpose:	Purchase	Loan Type:	Conventional	Origin	nation Type:	
FHA Section:		MIC #:				
Loan Rep:	LOAN REP	Broker Name:	BROKER NAME	Brand	sh:	BRANCH
IMPORTANT DATE	S					
Application Date:	03/01/2021	Cancel Date:		CD/R	e-Disc Send Date:	



Process

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





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.

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#### Confirmation





#### Confirmation

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





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.

DocMaster - MICHAEL SAMPLE —	$\times$
File Tracking Options Help	
View Print Attach file eDelivery	0 Close
<ul> <li>WS # 100AD_24 Plan: 100RC_DSI_CONV</li> <li>Loan Detail Report</li> <li>California Domestic Partnership Addendum To Urla</li> <li>Uniform Residential Loan Application</li> <li>General Closing Instructions</li> <li>Multistate Fixed Rate Note</li> <li>California Deed Of Trust</li> <li>Specific Closing Instructions</li> <li>Borrower's Certification And Authorization</li> <li>Certificate Of Loans To One Borrower</li> <li>Hazard Insurance Authorization And Requirements</li> <li>Ives Request For Transcript Of Tax Return</li> <li>W9 - Payers Request For Taxpayer Id</li> <li>California Assignment Of Deed</li> <li>Acknowledgment Of Receipt Of Appraisal Report</li> </ul>	^
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#### DocMaster

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





#### eSign Console

After sending out the documents, you can access your <u>eSign Console</u> here from your dashboard.





#### eSign Console

You'll be greeted with a list of document sets that have been processed within the past 90 days. You can also export this information as a csv.

Active Requi	Image: Showing 1 - 17 of 17       Image: Showin	Signer Email Stephen Truitt (+1)	Status Worksheet #	Ver	Created					
1         Show:         50           Loan #         Document See           ↑         77707232           Closing Doc         77707032           Closing Doc         77707162           Closing Doc         77707162           Closing Doc         77707112           Integrated D         77707102           Closing Doc         77707102           Closing Doc         77707002           Closing Doc         77707032	20240001 20240001 20240001	Signer Email Stephen Truitt (+1)	Status Worksheet #	<u>Ver</u>	Created					ا 🖻 🔶
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It's crucial that you know that these loan packages will only be present on this console for 90 days after generation. 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.



#### Help Button

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

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#### Status Icons

The icons on the left indicate the processing status of the document set. A star icon means that the set has just been processed (it's new).

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The computer monitor with the check mark indicates that the participant(s) have consented to the use of electronic signatures and eSign.



#### Status Icons

# The gear icon indicates that the document set is still in progress – there are items that have not been signed yet.

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The piece of paper with the check mark indicates that the set has been completed and signed. Meanwhile, the *full checkmark* indicates that the document set has been completed, signed, and *printed*.



#### Opening a Document Set

Click on the loan number to see details about that document set.

V e	Sign Conso 🧿 - Steve Ti	ruitt	Scheduler	Monitoring	Accounts	eSign Requests	Cr	eate Ro	equest	Search	👤 Account 👻
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Key Info

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

🍌 eSign Console - Steve Truitt			Scheduler	Monitoring	Accounts	eSign Request	s Create Re	equest Searcl	Account -
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Details Documents Documents Recei	ved EMails Versions							<b>B</b>	A 🗟 🗢 🔒
Participants 🛃								Pre	view Mode - Off
# Name/Email	Role	Created	Started	Consented	Viewed	Completed	Declined	Links	
1 John Smith ron@docmagic.com	Borrower	10/3/22 1:54 PM						Send Email	nts
3 Andy Agent ron@docmagic.com	Settlement Agent	10/3/22 1:54 PM						Send Email Agent Portal	
Action Log									
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#### Worksheet Number

If you have an issue where you need to contact DocMagic's Customer Service department, they'll always ask you for the worksheet number.

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Loan #: 777100313 Primary Name: John Smith Type: EClosing Package Id: 504292 Worksheet #: 2990 (Versi	ion : 1)		Lender:	Ron Carrillo DSI TEST LI ron@docma (708)531-90	ENDER (SA gic.com 60	LES) (100SALE	S)	Status: Documents: Signers: Expires: Signatures:	New (Acti 15 (55 tot 3 N/A (Req Y	ive) al pages) uires: Prim	ary)	
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3 Andy Agent ron@docmagic.com		Settlem	ient Agent	10/3/22 1:54 PM						🔛 Send 📾 Ager	t Email It Portal	
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© Copyright 2022 DocMagic, Inc ALI	L RIGHTS RESERVED								Home	Contact Pr	ivacy Polic	y Terms of Use



Details

Under the Details tab, you can find Participants and the Action Log. Note that you see can the role of each participant in the second column.

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The Action Log at the bottom tracks every step taken with this document set.



Links

Under the Links column on the far right, "Send Email" sends the borrower a reminder email to sign the documents if they have not yet done so.

	eSign Cons	ole - Steve T	fruitt				Schedule	m Monitoring	Accounts	eSign Reque	sts Create I	Request	Search	Account
	Loan #:	77710031350			Lender:	Ron Carrillo				Status:	New (Activ	e)	Ret	urn to Search
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Sign Documents allows you to open that Participant's signing experience – this assumes that the participant is with you. Selecting Sign Documents opens the customer signing experience in another tab.



#### Links

# If you have a Settlement Agent, you may also enter their agent portal.

eSian Console - Steve Truitt			Scheduler	Monitoring	Accounts	eSign Reques	s Create	Request	Search	Accour
									Re	turn to Sear
Loan #:         77710031350           Primary Name:         John Smith           Type:         EClosing           Package Id:         604282           Worksheet #:         2990 (Version : 1)           Closing Date:         9/30/22	Lender:	Ron Carrillo DSI TEST LI ron@docma (708)531-90	ENDER (SALE gic.com 60	S) (100SALE:	3)	Status: Documents: Signers: Expires: Signatures:	New (Activ 15 (55 tota 3 N/A (Requ Y	e) I pages) ires: Prima	ary)	
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John Smith ron@docmagic.com	Borrower	10/3/22 1:54 PM						🖂 Send 🌚 Sign	f Email Document	łs
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Copyright 2022 DocMagic, Inc ALL RIGHTS RESERVED							Home	Contact Pr	ivacy Polic	y Terms of L

If you want to add a Settlement Agent, we'll show you how on the next page.



### Adding Participants

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articipants 🛃	Last Name:									Previe	w Mode - Off
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Populate the fields in the window that appears. Make sure to give them an Access Code and choose the correct role from the dropdown. Select Add when done.



#### Adding Participants

# If there are signatures that are designated for the new participant, you would be able to go in and sign.

	gri Cons	ole - Slev					Scriedui	er morntoring	Account	s eolgii Kequesi	s Create Re	squesi Sea	
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Primar Pac Work Closi	Loan #:         77710031350           Primary Name:         John Smith           Type:         EClosing           Package Id:         604282           Worksheet #:         2990 (Version : 1)           Closing Date:         9/30/22				Lender:	Ron Carrille DSI TEST L ron@docma (708)531-90	o ENDER (SA agic.com )60	(SALES) (100SALES)		Status: Documents: Signers: Expires: Signatures:	New (Active) 15 (55 total pages) 3 N/A (Requires: Primary) Y		
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#### Disable Preview Mode Toggle

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

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Ż	eSign Cons	sole - Stev	ve Truitt					Schedul	er Monitoring	Accour	its eSign Req	uests Crea	ite Request	Search	🔍 Account 👻
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Pa	rticipants	<b>&amp;</b> +												Preview	w Mode - On
#	Name/Email				Role		Created	Started	Consented	Viewed	Completed	Declined	Links		
1	John Smith struitt@docmagic	c.com			Borrow	ver	7/13/22 10:47 AM						Send En Preview	nail Documents	
3	Andy Agent struitt@docmagio	c.com			Settler	ment Agent	7/13/22 10:48 AM						Send En Agent Po	nail ortal	
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7/1	13/22 10:48 AM		Ar	ndy Agent				Invi	Add Intern	ruitt@doc al Note	magic.com				
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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.



#### Disable Preview Mode Toggle

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

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eSign	eSign	10	000	DocMagic	×	×	
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100DSI-DMO	DocMagic	20	010	DocMagic	×	×	
100CG	Chris Mortage	10	001	Box Home Loans 100	4 🖌	×	
100JF	DSI_TEST_LENDER	10	002	DocMagic	×	×	
100RC	DSI TEST LENDER (RON CARRILLO)	10	003	Ron's clean sample	×	×	
100RL	RICKS TEST LENDER	10	004	Fremont Bank	×		
100MSM	DOCMAGIC TEST LENDER	10	005	DocMagic (Michael Morfe	ord) 🛷	×	
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100NK	DOCUMENT SYSTEMS, INC. TEST	10	011	Norm	×		
100JB	JEREMY'S TEST LENDER	10	012	DocMagic	×	<b>~</b>	
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Click on an Account. The search function above allows you to filter by Account Name or Number.



### Disable Preview Mode Toggle

Select Edit Preferences.

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#### Disable Preview Mode Toggle

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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	~						
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General								
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Participants								
			D	¢Ш				

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



#### Documents Tab

The Documents Tab displays a breakdown of the individual documents that are to be signed as part of the document package.

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$\dot{\mathbf{k}}$	eSign Console - S <mark>eve Truitt</mark>				Schedule	er Monitoring	Accounts eSign Reques	ts Create Reque	st Search 👤 Account 🗸
F	Loan #: 777100 11350 trimary Name: John S nith Type: EClosi g Package Id: 604822 Worksheet #: 2990 (# arsion : 2) Closing Date: 9/30/22	Lender:	Steve DSI T struitt( (800)6	Truitt EST LEN @docmag 649-1362	DER (SAL gic.com	ES) (100SALE	Status: ES) Documents: Signers: Expires: Signatures:	New (Active) 15 (55 total page 2 N/A (Requires: P Y (Ink Sign)	s) rimary)
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1	Borrower's Certification, Authorization and Consent	×	2	1	1		5175538   5187039	bcac.msc.xml	
2	Multistate Fixed Rate Note		0/4	1	1		5175539   5187040	us3200.not.xml	Mark as Complete
3	New Jersey Mortgage (MERS)		0/19	1	1		5175540   5187041	nj3031.mzm.xml	Mark as Complete
4	Uniform Residential Loan Application	× .	7	1	1		5175541   5187042	urla.msc.xml	
5	Uniform Residential Loan Application - Lender Loan Information	<ul> <li>Image: A second s</li></ul>	2	0	0	<b>v</b>	5175542   5187043	urlalli.msc.xml	
6	Addendum to Closing Instructions	×	1	1	1		5175543   5187044	atci3.msc.xml	
7	Specific Closing Instructions	<ul> <li>Image: A second s</li></ul>	3	4	2		5175544   5187045	sci.msc.xml	
8	Hazard Insurance Authorization and Requirements	<ul> <li>Image: A second s</li></ul>	2	1	1		5175545   5187046	hazard8.lsr.xml	
9	IVES Request for Transcript of Tax Return	×	2	2	1		5175546   5187047	4506c.msc.xml	
10	Closing Disclosure	<ul> <li>Image: A second s</li></ul>	5	1	1		5175547   5187048	cd.dsc.xml	
11	Customer Identification Verification	×	2	0	0	<ul> <li>Image: A second s</li></ul>	5175548   5187049	civ.msc.xml	
12	Initial Escrow Account Disclosure Statement	×	2	1	1		5175549   5187050	ieads.msc.xml	
13	New Jersey Initial Tax Authorization Notice	×	1	0	0	×	5175550   5187051	njitan.msc.xml	
14	New Jersey Private Well Testing Act Certification	×	1	1	1		5175551   5187052	njpwt.msc.xml	
15	Signature Affidavit and AKA Statement		0/2	1	1		5175552   5187053	saakas.msc.xml	Mark as Complete
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Click on a Document Name to download a PDF copy of the document.



#### Add a Document

#### The plus icon allows you to add documents to the package. eSign Con: ple - Steve Truitt Scheduler Monitoring Accounts eSign Requests Create Request Search & Account -77710031350 Loan #: Lender: Steve Truitt Status: New (Active) John Smith DSI TEST LENDER (SALES) (100SALES) Primary Name: Documents: 15 (55 total pages) EClosing Type: struitt@docmagic.com Signers: 2 604824 Package Id: (800)649-1362 Expires: N/A (Requires: Primary) Worksheet #: 2990 (Ver Upload a new document Closing Date: 9/30/22 👒 🔑 🚨 🚔 🔒 Details Documents Document Browse Documents 👩 🥖 Operation ent Nam Delete Borrower's Certification, Multistate Fixed Rate Note Mark as Complete 2 Car New Jersey Mortgage (MER 3 Mark as Complete Uniform Residential Loan Appl Uniform Residential Loan Application - Lender Loan Information 6 Addendum to Closing Instructions 5175543 | 5187044 atci3.msc.xml Specific Closing Instructions 2 5175544 | 5187045 sci.msc.xml Hazard Insurance Authorization and Requirements 5175545 | 5187046 nazard8.lsr.xm 8 2 Q IVES Request for Transcript of Tax Return 5175546 | 5187047 4506c msc xml 10 Closing Disclosure 5175547 | 5187048 cd.dsc.xml 11 Customer Identification Verification 5175548 | 5187049 civ.msc.xml 12 Initial Escrow Account Disclosure Statement 5175549 | 5187050 ieads msc xml 13 New Jersey Initial Tax Authorization Notice 0 5175550 | 5187051 njitan.msc.xml 14 New Jersey Private Well Testing Act Certification 5175551 | 5187052 1 njpwt.msc.xml 15 Signature Affidavit and AKA Statement 0/2 1 5175552 | 5187053 aakas.msc.xml Mark as Complete Add Internal Note DELL

Click Browse. Select a document from your computer and then click the blue Submit button.



AutoPrep

After you Submit, AutoPrep will trigger automatically and start tagging the document. It will detect signature lines and other items that need to be filled out.

AutoPrep is our proprietary software that utilizes optical character recognition and artificial intelligence. For additional information, please visit our <u>Product Training Page</u>. Click Next to continue.



AutoPrep

You'll be brought to the <u>Document Editor</u> to add or edit any additional fields that AutoPrep may have missed. Click Done in the top right to finalize your changes.

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	State of CALIFORNIA )	Required
14	County of LOS ANGELES )	
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	personally appeared _John Smith ANU Sandy Smith	
	Name(s) of Signer(s)	
	who proved to me on the basis of satisfactory evidence to be the person(s) whose name(s) is/are subscribed to t within instrument and acknowledged to me that he/she/they executed the same in his/her/their authorized capacity(ie	
15	and that by his/her/their signature(s) on the instrument the person(s), or the entity upon behalf of which the person acted, executed the instrument.	
	I certify under PENALTY OF PERJURY under the laws of the State of California that the foregoing paragraph is tr and correct.	
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#### Refresh

#### Clicking Done will take you back to the Loan. Click on the Documents tab and refresh the page.

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2	Uniform Resi	idential Loan Application		1	7	1	1		5092138   510	3639
3	Uniform Resi	idential Loan Application - Lender Loan Information		~	2	0	0	~	5092139   510	3640
4	Virginia Discl	osure of Terms of Mortgage Application		~	1	1	1		5092140   510	3641
5	IVES Reques	st for Transcript of Tax Return		~	2	2	1		5092141   510	3642
6	Authorization	for the Social Security Administration to Release SSN Verification			0/1	1	1		5092142   510	3643
7	Housing Cou	nselors Near You		4	6	0	0	~	5092143   510	3644
8	Important Inf	ormation About Procedures For Opening A New Account		~	1	1	1		5092144   510	3645
9	Iowa Subord	ination Agreement		1	4	0	0	~	5092145   510	3646
10	Lender Reco	rd Change		~	2	0	0	1	5092146   510	3647
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13	Virginia Haza	rd Insurance Disclosure		~	1	1	1		5092149   510	3650
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#### Edit Document



The Document Editor will open in another window. Click <u>here</u> for the guide.



#### Documents Received

Documents Received is only for closing packages. If there are any notarized documents that the notary has uploaded back into the portal, they show up here.

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Emails

Emails contain the i	nvitations that you	u've sent out already.
eSign Console - Steve Truitt		
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#### Versions

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#### Milestones

This middle area shows the date and time that each milestone was completed for the participants. In the example below, the eSign event has been created but none of our participants have started the process.

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Loan #: 77710031 Primary Name: John Smi Type: EClosing Package Id: 604282 Worksheet #: 2990 (Ven Closing Date: 9/30/22	350 th sion : 1)	L	ender:	Ron Carrillo DSI TEST LI ron@docma (708)531-90	DENDER (SA gic.com 60	LES) (100SAL	is)	Status: Documents: Signers: Expires: Signatures:	New (Acti 15 (55 tota 3 N/A (Requ Y	ve) al pages) uires: Prima	ary)	
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						Add Inter	nal Note					
										Cancel Requ	iest De	lete Request

The timestamps will populate as the participants start the process, give their consent, view the documents, and then either complete their signing or decline to sign.



### Borrower's Signing Experience

When the borrower clicks on the link in the invitation email, they will be taken to DocMagic's signing experience displayed below.

☆ DocMagic	💿 Review 🔵 Sign 🌾 Completed		JS JOHN SMITH Customer	~
Please review your documents.	Initial Disclosure Borrower's Certification, Authorization and Consen	t	Start sign	ng
			Borrower's Certification, Authorization and	
BORROWER CONSENT	TO THE USE OF TAX RETURN INFORMATION		Addendum to Loan Application	ත්
I understand, acknowledge, and agree that the information for purposes of:	Lender and Other Loan Participants can obtain, use and share tax return		Uniform Residential Loan Application	(j)
<ul> <li>(ii) originating, maintaining, managi</li> <li>(iii) as otherwise permitted by applica</li> <li>(iv) marketing</li> </ul>	ng, monitoring, servicing, selling, insuring, and securitizing a loan; or ble laws, including state and federal privacy and data security laws.; or		IVES Request for Transcript of Tax Return	
The Lender includes the Lender's affiliates, and assigns.	agents, service providers and any of aforementioned parties' successors		California Acknowledgment of Receipt of L	
The Other Loan Participants includes any ac or acquirers of any beneficial or other intere-	tual or potential owners of a loan resulting from your loan application, st in the loan, any mortgage insurer, guarantor, any servicers or service		California Copies of Signed Documents	
providers for these parties and any of aroren	tennoneu parties successors and assigns.		California Fair Lending Notice California Hazard Insurance Disclosure	
Signature			Housing Counselors Near You	
Borrower JOHN SMITH	Date Borrower Date		Important Information About Procedures f	
			Lender Record Change	
		<u> </u>	Loan Estimate	
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Here, the borrower will be able to sign the necessary documents. For more information on the borrower's signing experience, please visit our <u>Product Training Page</u>.



#### Post Borrower Signing

After the borrower completes their signing experience, you'll be able to see the row of date and time stamps here. Refresh the web page if you don't see the changes at first.

eSign Console	e - Steve Truitt						Schedule	r Monitoring A	Accounts eSign	n Requests Create Reque	st Search LAcc
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Stephen Truitt strutt221@gmail.co			Other	9/7/22 11:17 AM						Send Email Sign Documents	
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The Action Log documents all the changes that occur.



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#### There are some useful icons towards the top right of the page. The lock allows you to archive the package.

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#### You can view the DocMagic eSign certificate by clicking here.



#### Certificate

# The certificate mentioned previously downloads or opens as a PDF.

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The PDF icon downloads the entire list of signed documents (including the certificate).

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3 Andy Agent shult@docmagic.com			Settlement Agent	9/7/22 11:94 AM						
4 Stephen Truitt struitt21@gmail.com			Other	9/7/22 11.17 AM			-		Sign Documents	_
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9/7/22 11:31 AM	John Smith		Virginia Disclosure of Te	rms of Mortgage A	pplication signe	d by JOHN SMITH				
9/7/22 11:31 AM	John Smith		IVES Request for Trans	cript of Tax Return	signed by JOHI	N SMITH				
9/7/22 11:31 AM	John Smith		Important Information A	bout Procedures Fo	or Opening A Ne	w Account signed t	by JOHN SMITH			_

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



#### Settlement Agent Portal

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

<b>1</b>	OocMagic eClose Conso	le (Settlement Agent)				🙆 Andy 🗸
	N Loan #: 070620220001 Primary Borrower: John Smith Type: EClosing Package ID: 55433 Worksheet #: 2704 (Version:	1)	Company: DSI TEST LEN Contact: Steve Truitt Email: struit@docma Phone: (800) 649-136;	IDER (SALES) gic.com 2	Date: Jul 6, 2022 (Wed)	MINUTES SECONDS
4	Details 📄 eJournal	Action Log				
Sigr	ners (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
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3	Uniform Residential Loan Application - Lender L	oan Information		2	0	<b>~</b>
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#### Settlement Agent Training

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





#### Email Confirmation

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

Electronic Document Delivery O docs@docmagic.com> To: O Steve Truitt	ی) 😳 🔶 🦛 ڪ Today at 12:17 PM
Lender: DSI TEST LENDER (SALES) ( Truitt) Account: 100SALES Loan Number: 777102620220009999 Recipient: ALAN DAI Package Type: EClosing (93759784) Worksheet: 812	
This is a notification to let you know a signature request has been completed. To retrieve the final documents, please <u>click here</u> eSign ID: 93759784 Reference ID: 777102620220009999 System ID: 100SALES_812	
This message and any attachments contain information which may be confidential and privileged. Unless you are the addressee (or author addressee), you may not use, copy or disclose to anyone any information contained in this message or in any attachments. If you have re- please advise the sender and delete this message and any attachments. <i>Please consider the environment before printing this email</i> .	rized to receive for the ceived this message in error,
B/411	



#### 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.

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7/6/22 11:52 AM Stephen Truitt	Invitation se	ent to struitt	221@gmail.	.com						
7/6/22 11:53 AM System User	Preview Mo	de was ena	abled							
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#### Return to the eSign Console



You can also review the Action Log.



#### Additional Resources

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

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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	Decimed	Send Em	Sian Out		
3 Andy Agent struitt@docmagic.com	Settlement	t 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 Em	al	-	_
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You can find more training materials on the eSign Console by visiting our <u>Product Training Page</u>.



### eSign Console/Lender Portal

#### Create Request

#### If there are document(s) that you want to send separate, click "Create Request" in the top right corner.

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Click on the Bonus Material section on the <u>Lender's Product Training Page</u> for details.

