

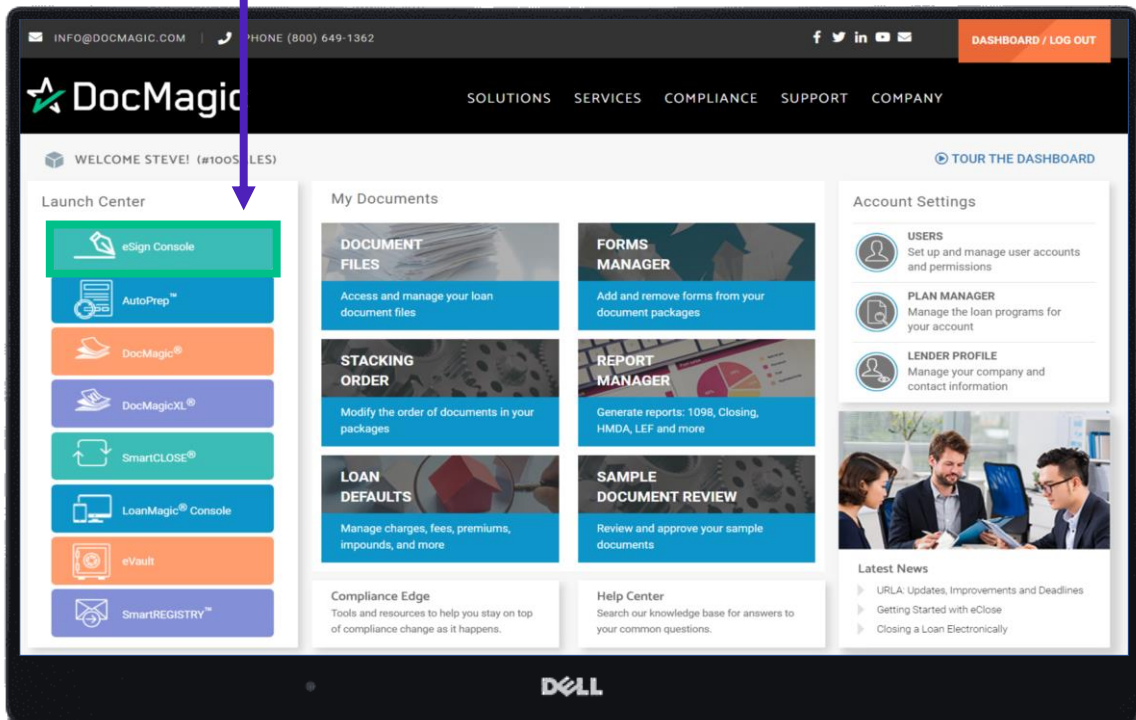


eSign Console
Lender Portal

eSign Console/Lender Portal

Getting Started

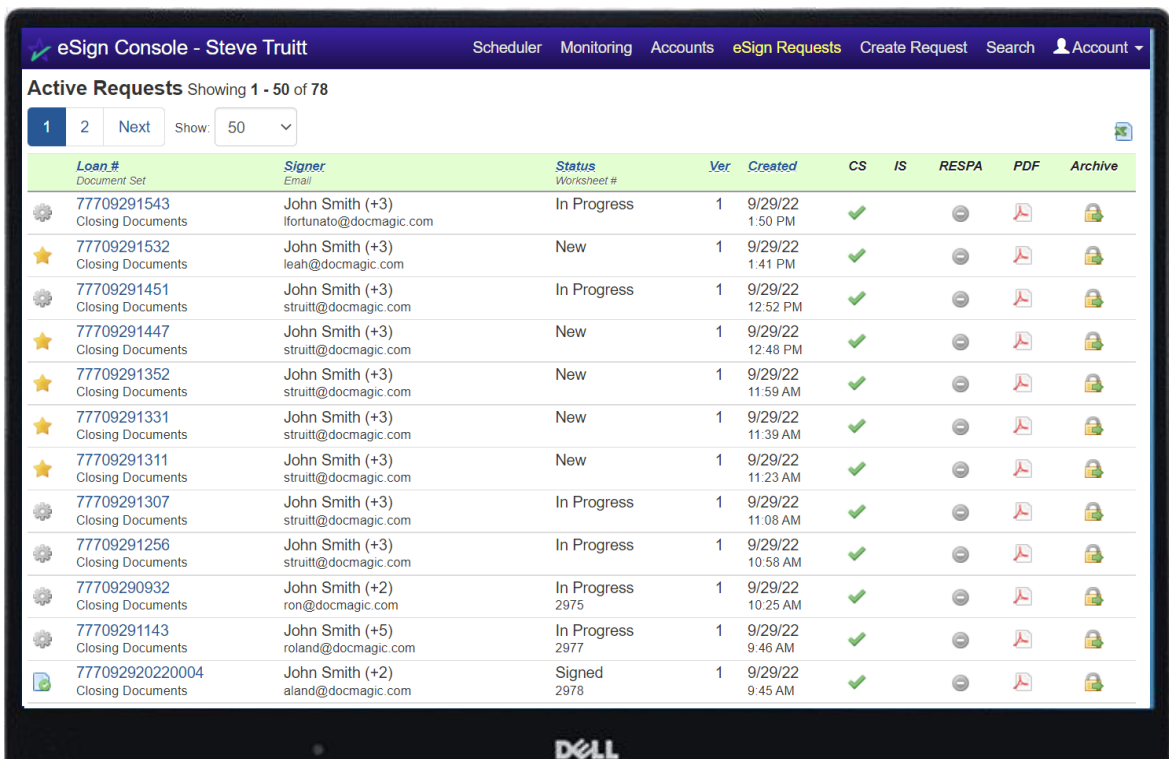
Login to DocMagic and open the eSign Console from the Launch Center.



eSign Console/Lender Portal

eSign Console

You'll be greeted with a list of document sets that have been processed within the past 90 days.



The screenshot displays the 'eSign Console - Steve Truitt' interface. The top navigation bar includes 'Scheduler', 'Monitoring', 'Accounts', 'eSign Requests', 'Create Request', 'Search', and 'Account'. The main content area is titled 'Active Requests Showing 1 - 50 of 78'. Below this, there is a pagination control with '1', '2', 'Next', and 'Show: 50'. The table below lists various loan document sets with columns for Loan #, Signer, Status, Ver, Created, CS, IS, RESPA, PDF, and Archive.

Loan # Document Set	Signer Email	Status Worksheet #	Ver	Created	CS	IS	RESPA	PDF	Archive
77709291543 Closing Documents	John Smith (+3) lfortunato@docmagic.com	In Progress	1	9/29/22 1:50 PM	✓	⊖	⊖	📄	🔒
77709291532 Closing Documents	John Smith (+3) leah@docmagic.com	New	1	9/29/22 1:41 PM	✓	⊖	⊖	📄	🔒
77709291451 Closing Documents	John Smith (+3) struitt@docmagic.com	In Progress	1	9/29/22 12:52 PM	✓	⊖	⊖	📄	🔒
77709291447 Closing Documents	John Smith (+3) struitt@docmagic.com	New	1	9/29/22 12:48 PM	✓	⊖	⊖	📄	🔒
77709291352 Closing Documents	John Smith (+3) struitt@docmagic.com	New	1	9/29/22 11:59 AM	✓	⊖	⊖	📄	🔒
77709291331 Closing Documents	John Smith (+3) struitt@docmagic.com	New	1	9/29/22 11:39 AM	✓	⊖	⊖	📄	🔒
77709291311 Closing Documents	John Smith (+3) struitt@docmagic.com	New	1	9/29/22 11:23 AM	✓	⊖	⊖	📄	🔒
77709291307 Closing Documents	John Smith (+3) struitt@docmagic.com	In Progress	1	9/29/22 11:08 AM	✓	⊖	⊖	📄	🔒
77709291256 Closing Documents	John Smith (+3) struitt@docmagic.com	In Progress	1	9/29/22 10:58 AM	✓	⊖	⊖	📄	🔒
77709290932 Closing Documents	John Smith (+2) ron@docmagic.com	In Progress 2975	1	9/29/22 10:25 AM	✓	⊖	⊖	📄	🔒
77709291143 Closing Documents	John Smith (+5) roland@docmagic.com	In Progress 2977	1	9/29/22 9:46 AM	✓	⊖	⊖	📄	🔒
777092920220004 Closing Documents	John Smith (+2) aland@docmagic.com	Signed 2978	1	9/29/22 9:45 AM	✓	⊖	⊖	📄	🔒

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.



eSign Console/Lender Portal

Help Button

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

The screenshot shows the eSign Console interface for Steve Truitt. 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. Below the navigation bar, the 'Active Requests' section shows a table of 15 requests. The table has columns for Loan #, Signer, Status, Ver, Created, CS, IS, and RES. The requests are listed in descending order of creation date, from 9/29/22 1:50 PM to 9/29/22 9:45 AM.

Loan #	Signer	Status	Ver	Created	CS	IS	RES
77709291543	John Smith (+3) lfortunato@docmagic.com	In Progress	1	9/29/22 1:50 PM	✓		
77709291532	John Smith (+3) leah@docmagic.com	New	1	9/29/22 1:41 PM	✓		
77709291451	John Smith (+3) struitt@docmagic.com	In Progress	1	9/29/22 12:52 PM	✓		
77709291447	John Smith (+3) struitt@docmagic.com	New	1	9/29/22 12:48 PM	✓		
77709291352	John Smith (+3) struitt@docmagic.com	New	1	9/29/22 11:59 AM	✓		
77709291331	John Smith (+3) struitt@docmagic.com	New	1	9/29/22 11:39 AM	✓		
77709291311	John Smith (+3) struitt@docmagic.com	New	1	9/29/22 11:23 AM	✓		
77709291307	John Smith (+3) struitt@docmagic.com	In Progress	1	9/29/22 11:08 AM	✓		
77709291256	John Smith (+3) struitt@docmagic.com	In Progress	1	9/29/22 10:58 AM	✓		
77709290932	John Smith (+2) ron@docmagic.com	In Progress 2975	1	9/29/22 10:25 AM	✓		
77709291143	John Smith (+5) roland@docmagic.com	In Progress 2977	1	9/29/22 9:46 AM	✓		
777092920220004	John Smith (+2) aland@docmagic.com	Signed 2978	1	9/29/22 9:45 AM	✓		



eSign Console/Lender Portal

Status Icons

The icons on the left indicate the processing status of the document set. A star indicates that the set has just been processed (new).

Loan # Document Set	Signer Email	Status Worksheet #	Ver	Created	CS	IS	RESPA	PDF	Archive
77709291543 Closing Documents	John Smith (+3) lfortunato@docmagic.com	In Progress	1	9/29/22 1:50 PM	✓	⊖	📄	🔒	
77709291532 Closing Documents	John Smith (+3) leah@docmagic.com	New	1	9/29/22 1:41 PM	✓	⊖	📄	🔒	
77709291451 Closing Documents	John Smith (+3) struitt@docmagic.com	In Progress	1	9/29/22 12:52 PM	✓	⊖	📄	🔒	
77709291447 Closing Documents	John Smith (+3) struitt@docmagic.com	New	1	9/29/22 12:48 PM	✓	⊖	📄	🔒	
77709291352 Closing Documents	John Smith (+3) struitt@docmagic.com	New	1	9/29/22 11:59 AM	✓	⊖	📄	🔒	
77709291331 Closing Documents	John Smith (+3) struitt@docmagic.com	New	1	9/29/22 11:39 AM	✓	⊖	📄	🔒	
77709291311 Closing Documents	John Smith (+3) struitt@docmagic.com	New	1	9/29/22 11:23 AM	✓	⊖	📄	🔒	
77709291307 Closing Documents	John Smith (+3) struitt@docmagic.com	In Progress	1	9/29/22 11:08 AM	✓	⊖	📄	🔒	
77709291256 Closing Documents	John Smith (+3) struitt@docmagic.com	In Progress	1	9/29/22 10:58 AM	✓	⊖	📄	🔒	
77709290932 Closing Documents	John Smith (+2) ron@docmagic.com	In Progress 2975	1	9/29/22 10:25 AM	✓	⊖	📄	🔒	
77709291143 Closing Documents	John Smith (+5) roland@docmagic.com	In Progress 2977	1	9/29/22 9:46 AM	✓	⊖	📄	🔒	
777092920220004 Closing Documents	John Smith (+2) aland@docmagic.com	Signed 2978	1	9/29/22 9:45 AM	✓	⊖	📄	🔒	

The piece of paper with the check mark indicates that the set has been completed and signed.



eSign Console/Lender Portal

Status Icons

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

Loan # Document Set	Signer Email	Status Worksheet #	Ver	Created	CS	IS	RESPA	PDF	Archive
77709291543	John Smith (+3) lfortunato@docmagic.com	In Progress	1	9/29/22 1:50 PM	✓	⊖	📄	🔒	
77709291532	John Smith (+3) leah@docmagic.com	New	1	9/29/22 1:41 PM	✓	⊖	📄	🔒	
77709291451	John Smith (+3) struitt@docmagic.com	In Progress	1	9/29/22 12:52 PM	✓	⊖	📄	🔒	
77709291447	John Smith (+3) struitt@docmagic.com	New	1	9/29/22 12:48 PM	✓	⊖	📄	🔒	
77709291352	John Smith (+3) struitt@docmagic.com	New	1	9/29/22 11:59 AM	✓	⊖	📄	🔒	
77709291331	John Smith (+3) struitt@docmagic.com	New	1	9/29/22 11:39 AM	✓	⊖	📄	🔒	
77709291311	John Smith (+3) struitt@docmagic.com	New	1	9/29/22 11:23 AM	✓	⊖	📄	🔒	
77709291307	John Smith (+3) struitt@docmagic.com	In Progress	1	9/29/22 11:08 AM	✓	⊖	📄	🔒	
77709291256	John Smith (+3) struitt@docmagic.com	In Progress	1	9/29/22 10:58 AM	✓	⊖	📄	🔒	
77709290932	John Smith (+2) ron@docmagic.com	In Progress 2975	1	9/29/22 10:25 AM	✓	⊖	📄	🔒	
77709291143	John Smith (+5) roland@docmagic.com	In Progress 2977	1	9/29/22 9:46 AM	✓	⊖	📄	🔒	
77709292020004	John Smith (+2) aland@docmagic.com	Signed 2978	1	9/29/22 9:45 AM	✓	⊖	📄	🔒	

The full checkmark indicates that the document set has been signed and printed.



eSign Console/Lender Portal

Opening a Document Set

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

The screenshot shows the eSign Console interface for Steve Truitt. The top navigation bar includes Scheduler, Monitoring, Accounts, eSign Requests, Create Request, Search, and Account. The main content area is a table of document sets. The first row is highlighted with a green box around the loan number 777100320220001. A callout box points to this loan number with the text: "Click on the loan number to see details about that document set."

Loan.# Document Set	Signer Email	Status Worksheet #	Ver	Created	CS	IS	RESPA	PDF	Archive
777100320220001 Closing Documents	John Smith (+3) aland@docmagic.com	New 2991	1	10/3/22 2:04 PM	✓	⊖	⊖	📄	🔒
77710031350 Closing Documents	John Smith (+2) ron@docmagic.com	New 2990	1	10/3/22 1:54 PM	✓	⊖	⊖	📄	🔒
77710031349 Closing Documents	John Smith (+2) ron@docmagic.com	New 2989	1	10/3/22 1:52 PM	✓	⊖	⊖	📄	🔒
77710031348 Closing Documents	John Smith (+2) ron@docmagic.com	New 2988	1	10/3/22 1:49 PM	✓	⊖	⊖	📄	🔒
77709291543 Closing Documents	John Smith (+3) lfortunato@docmagic.com	In Progress	1	9/29/22 1:50 PM	✓	⊖	⊖	📄	🔒
77709291532 Closing Documents	John Smith (+3) leah@docmagic.com	New	1	9/29/22 1:41 PM	✓	⊖	⊖	📄	🔒
77709291451 Closing Documents	John Smith (+3) struitt@docmagic.com	In Progress	1	9/29/22 12:52 PM	✓	⊖	⊖	📄	🔒
77709291447 Closing Documents	John Smith (+3) struitt@docmagic.com	New	1	9/29/22 12:48 PM	✓	⊖	⊖	📄	🔒
77709291352 Closing Documents	John Smith (+3) struitt@docmagic.com	New	1	9/29/22 11:59 AM	✓	⊖	⊖	📄	🔒
77709291331 Closing Documents	John Smith (+3) struitt@docmagic.com	New	1	9/29/22 11:39 AM	✓	⊖	⊖	📄	🔒
77709291311 Closing Documents	John Smith (+3) struitt@docmagic.com	New	1	9/29/22 11:23 AM	✓	⊖	⊖	📄	🔒
77709291307 Closing Documents	John Smith (+3) struitt@docmagic.com	In Progress	1	9/29/22 11:08 AM	✓	⊖	⊖	📄	🔒
77709291256 Closing Documents	John Smith (+3) struitt@docmagic.com	In Progress	1	9/29/22 10:58 AM	✓	⊖	⊖	📄	🔒
77709290932 Closing Documents	John Smith (+2) ron@docmagic.com	In Progress 2975	1	9/29/22 10:25 AM	✓	⊖	⊖	📄	🔒



eSign Console/Lender Portal

Key Info

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 interface for a user named Steve Truitt. The top navigation bar includes links for Scheduler, Monitoring, Accounts, eSign Requests, Create Request, Search, and Account. The main content area is divided into several sections:

- Loan Details:** Loan #: 77710031350, Lender: Ron Carrillo, Status: New (Active). Primary Name: John Smith, Type: EClosing, Package Id: 604282, Worksheet #: 2990 (Version: 1), Closing Date: 9/30/22. Lender information: DSI TEST LENDER (SALES) (100SALES), ron@docmagic.com, (708)531-9060. Documents: 15 (55 total pages), Signers: 3, Expires: N/A (Requires: Primary), Signatures: Y.
- Documents:** Tabs for Documents, Documents Received, EMail, and Versions.
- Participants:** A table listing participants 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).
- Action Log:** A table showing system events with columns for Date, User, IP Address, and Description. Three entries are shown, all dated 10/3/22 at 1:54 PM.

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



eSign Console/Lender Portal

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.

The screenshot displays the eSign Console interface for a user named Steve Truitt. The top navigation bar includes links for Scheduler, Monitoring, Accounts, eSign Requests, Create Request, Search, and Account. The main content area shows loan details for Loan # 77710031350, Primary Name John Smith, Type EClosing, and Package Id 604282. The Worksheet # 2990 (Version: 1) is highlighted with a green box and a blue arrow pointing to the explanatory text above. Other details include Lender Ron Carrillo (DSI TEST LENDER (SALES) (100SALES)), Status New (Active), Documents 15 (55 total pages), Signers 3, Expires N/A (Requires: Primary), and Signatures Y. Below the details 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. The Action Log section shows a table with columns for Date, User, IP Address, and Description. At the bottom, there are buttons for Add Internal Note, Cancel Request, and Delete Request, along with copyright information and a footer with Home, Contact, Privacy Policy, and Terms of Use links.

#	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 Sign Documents
3	Andy Agent ron@docmagic.com	Settlement Agent	10/3/22 1:54 PM						Send Email Agent Portal

Date	User	IP Address	Description
10/3/22 1:54 PM	System User		eSign event created
10/3/22 1:54 PM	John Smith		Invitation sent to ron@docmagic.com
10/3/22 1:54 PM	Andy Agent		Invitation sent to ron@docmagic.com



eSign Console/Lender Portal

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.

The screenshot displays the eSign Console interface for a document set. The top navigation bar includes 'Scheduler', 'Monitoring', 'Accounts', 'eSign Requests', 'Create Request', 'Search', and 'Account'. The main content area is divided into two sections: 'Participants' and 'Action Log'. The 'Participants' section is highlighted with a green box and contains a table with columns for '#', 'Name/Email', 'Role', 'Created', 'Started', 'Consented', 'Viewed', 'Completed', 'Declined', and 'Links'. The 'Action Log' section is also highlighted with a green box and contains a table with columns for 'Date', 'User', 'IP Address', and 'Description'. Both sections are linked to the 'Details' tab in the top navigation bar.

#	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 Sign Documents
3	Andy Agent ron@docmagic.com	Settlement Agent	10/3/22 1:54 PM						Send Email Agent Portal

Date	User	IP Address	Description
10/3/22 1:54 PM	System User		eSign event created
10/3/22 1:54 PM	John Smith		Invitation sent to ron@docmagic.com
10/3/22 1:54 PM	Andy Agent		Invitation sent to ron@docmagic.com

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



eSign Console/Lender Portal

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.

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 Summary:** Loan #: 77710031350, Lender: Ron Carrillo, Status: New (Active), Documents: 15 (55 total pages), Signers: 3, Expires: N/A (Requires: Primary), Signatures: Y.
- Participants Table:**

#	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 Sign Documents
3	Andy Agent ron@docmagic.com	Settlement Agent	10/3/22 1:54 PM						Send Email Agent Portal

- Action Log:** Shows events such as 'eSign event created' and 'Invitation sent to ron@docmagic.com'.
- Buttons:** 'Cancel Request' and 'Delete Request' are visible at the bottom right.

A blue arrow points from the 'Send Email' link in the 'Links' column of the Participants table to the explanatory text box above.

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.



eSign Console/Lender Portal

Links

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

The screenshot displays the eSign Console interface for a loan. At the top, the user is logged in as Steve Truitt. The loan summary shows a loan number of 77710031350, primary name John Smith, and lender Ron Carrillo. The status is 'New (Active)'. Below the summary are tabs for 'Details', 'Documents', 'Documents Received', 'Emails', and 'Versions'. The 'Participants' section contains a table with the following data:

#	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 Sign Documents
3	Andy Agent ron@docmagic.com	Settlement Agent	10/3/22 1:54 PM						Send Email Agent Portal

The 'Agent Portal' link for the Settlement Agent is highlighted with a red box. Below the participants table is an 'Action Log' section with the following entries:

Date	User	IP Address	Description
10/3/22 1:54 PM	System User		eSign event created
10/3/22 1:54 PM	John Smith		Invitation sent to ron@docmagic.com
10/3/22 1:54 PM	Andy Agent		Invitation sent to ron@docmagic.com

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



eSign Console/Lender Portal

Adding Participants

Click here to add participants.

The screenshot displays the eSign Console interface for a user named Steve Truitt. The main window shows loan details for Loan # 7710031350, Lender: Ron Carrillo, and Status: New (Active). A modal window titled "Add Participant" is open, prompting the user to provide information for a new participant. The fields are: First Name (Notary_name_placeholder), Last Name, Email, Access Code, and Role (Settlement Agent). The "Add" button is highlighted with a green box. Below the dialog box, the "Action Log" table shows the following entries:

Date		
10/3/22 1:54 PM	System User	eSign event created
10/3/22 1:54 PM	John Smith	Invitation sent to ron@docmagic.com
10/3/22 1:54 PM	Andy Agent	Invitation sent to ron@docmagic.com

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.



eSign Console/Lender Portal

Adding Participants

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

The screenshot displays the eSign Console interface for a user named Steve Truitt. The top navigation bar includes links for Scheduler, Monitoring, Accounts, eSign Requests, Create Request, Search, and Account. The main content area shows loan details for Loan # 77710031350, Lender Ron Carrillo, and Status New (Active). Below this, there are tabs for Details, Documents, Documents Received, EMail, and Versions. The 'Participants' section is active, showing a table with columns for #, Name/Email, Role, Created, Started, Consented, Viewed, Completed, Declined, and Links. The table lists three participants: John Smith (Borrower), Andy Agent (Settlement Agent), and a Notary placeholder. The 'Links' column for the Notary placeholder has a red box around the 'Sign Documents' link. Below the participants table is an 'Action Log' section with columns for Date, User, IP Address, and Description, showing three entries related to the eSign event creation and invitation sending. At the bottom, there are buttons for 'Add Internal Note', 'Cancel Request', and 'Delete Request', along with a footer containing copyright information and links for Home, Contact, Privacy Policy, and Terms of Use.

#	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 Sign Documents
3	Andy Agent ron@docmagic.com	Settlement Agent	10/3/22 1:54 PM						Send Email Agent Portal
4	Notary_name_placeholder -1 NOTARY_EMAIL_PLACEHOLDER-1	Notary	10/3/22 1:54 PM						Send Email Sign Documents

Date	User	IP Address	Description
10/3/22 1:54 PM	System User		eSign event created
10/3/22 1:54 PM	John Smith		Invitation sent to ron@docmagic.com
10/3/22 1:54 PM	Andy Agent		Invitation sent to ron@docmagic.com



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 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 shows loan details for Loan # 071320220002, Lender Steve Truitt, and Status New (Active). 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 lists John Smith (Borrower) and Andy Agent (Settlement Agent). The 'Action Log' section shows events such as 'eSign event created' and 'Invitation sent to struitt@docmagic.com'. The bottom of the interface includes a copyright notice and links for Home, Contact, Privacy Policy, and Terms of Use.

#	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

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

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.


The screenshot shows the 'eSign Console - Stephen Truitt' interface. The top navigation bar includes 'Scheduler', 'Monitoring', 'Accounts', 'Sign Requests', 'Create Request', 'Search', and 'Account'. The main content area is divided into sections: 'Account' (100AB, System, Y, N, N), 'Name' (LENDER NAME, LENDER STREET ADDRESS, LENDER CITY, CA 90000), 'Theme' (DocMagic, 2/11/09, 12:02 PM, 6/1/22, 3:43 PM, Email, Active: Y), and 'Default Email Templates'. The 'Theme' section shows 'DocMagic Corporate Theme' with a color swatch of #2f167c. A list of buttons on the right includes 'Clone Theme', 'Assign Existing Theme', 'Create New Theme', 'Edit Advanced Email Preferences', and 'Edit Preferences' (highlighted in green). A blue arrow points from the text 'Select Edit Preferences.' to the 'Edit Preferences' button.

Account: 100AB
Parent Group: System
New Console: Y
New Sign: N
Multi-Auth: N

Name: LENDER NAME
LENDER STREET ADDRESS
LENDER CITY, CA 90000

Theme: DocMagic
Created: 2/11/09, 12:02 PM
Modified: 6/1/22, 3:43 PM
Email:
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}}	



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: 'System', 'General', and 'Participants'. The 'System' section contains a list of configuration items, each with a dropdown menu. The 'Disable Preview Mode Toggle' is highlighted with a green box, and its value is set to 'Yes'. A blue arrow points from the instruction box above to this dropdown menu.

System	Value
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

General	Value
Time Zone:	America/Los_Angeles

Participants	Value
--------------	-------

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



eSign Console/Lender Portal

Documents Tab

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

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

Loan #: 77710031350 Lender: Steve Truitt Status: New (Active)
Primary Name: John Smith DSI TEST LENDER (SALES) (100SALES) Documents: 15 (55 total pages)
Type: EClosing struitt@docmagic.com Signers: 2
Package Id: 604824 (800)649-1362 Expires: N/A (Requires: Primary)
Worksheet #: 2990 (Version : 2) Signatures: Y (Ink Sign)
Closing Date: 9/30/22

Details Documents Documents Received EMails 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			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	n3031.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	✓	2	0	0	✓		5175542 5187043	urlali.msc.xml		
6 Addendum to Closing Instructions	✓	1	1	1			5175543 5187044	atci3.msc.xml		
7 Specific Closing Instructions	✓	3	4	2			5175544 5187045	sci.msc.xml		
8 Hazard Insurance Authorization and Requirements	✓	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	✓	5	1	1			5175547 5187048	cd.dsc.xml		
11 Customer Identification Verification	✓	2	0	0	✓		5175548 5187049	civ.msc.xml		
12 Initial Escrow Account Disclosure Statement	✓	2	1	1			5175549 5187050	leads.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	njpwat.msc.xml		
15 Signature Affidavit and AKA Statement		0/2	1	1			5175552 5187053	saakas.msc.xml		Mark as Complete

Add Internal Note

Click on a Document Name to download a PDF copy of the document.



eSign Console/Lender Portal

Add a Document

The plus icon allows you to add documents to the package.

The screenshot displays the eSign Console interface for a loan package. At the top, there are navigation tabs: Scheduler, Monitoring, Accounts, eSign Requests, Create Request, Search, and Account. The main header shows the loan details: Loan # 77710031350, Lender Steve Truitt, Status New (Active), Primary Name John Smith, Type EClosing, Package Id 604824, Worksheet # 2990, and Closing Date 9/30/22. A modal window titled "Upload a new document" is open, featuring a "Document" input field, a "Browse" button, and "Submit" and "Cancel" buttons. A table below the modal lists 15 documents with columns for Document Name, status, and operations. A green box highlights the plus icon in the Documents tab, and another green box highlights the "Browse" button. A blue arrow points from the plus icon to the "Browse" button.

Document Name																			
1	Borrower's Certification, A																		
2	Multistate Fixed Rate Note																		
3	New Jersey Mortgage (MER)																		
4	Uniform Residential Loan Appl																		
5	Uniform Residential Loan Application - Lender Loan Information	✓	2	0	0	✓	5175542 5187043												
6	Addendum to Closing Instructions	✓	1	1	1		5175543 5187044												
7	Specific Closing Instructions	✓	3	4	2		5175544 5187045												
8	Hazard Insurance Authorization and Requirements	✓	2	1	1		5175545 5187046												
9	IVES Request for Transcript of Tax Return	✓	2	2	1		5175546 5187047												
10	Closing Disclosure	✓	5	1	1		5175547 5187048												
11	Customer Identification Verification	✓	2	0	0	✓	5175548 5187049												
12	Initial Escrow Account Disclosure Statement	✓	2	1	1		5175549 5187050												
13	New Jersey Initial Tax Authorization Notice	✓	1	0	0	✓	5175550 5187051												
14	New Jersey Private Well Testing Act Certification	✓	1	1	1		5175551 5187052												
15	Signature Affidavit and AKA Statement		0/2	1	1		5175552 5187053												

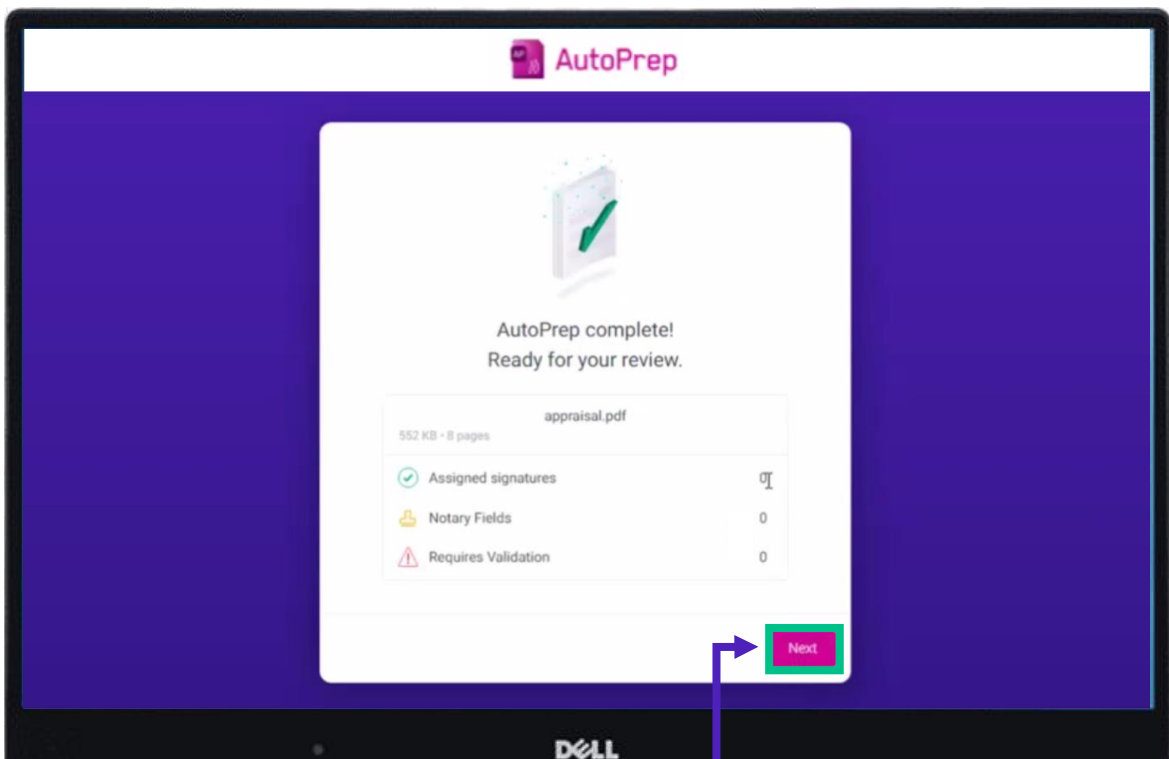
Click Browse. Select a document from your computer and then click the blue Submit button.



eSign Console/Lender Portal

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 [Product Training Page](#). Click Next to continue.



eSign Console/Lender Portal

AutoPrep

Add any additional fields that AutoPrep may have missed by dragging them in from the right. Click Done.

The screenshot displays a web interface for document preparation. On the left, there is a large text area for 'GENERAL COMMENTS' and a section for 'SUBJECT PROPERTY DETAIL' containing fields for County, Subdivision, Zoning, Land Use, Lot Size, Building Sq Ft, Living Sq Ft, Year Built, Bedrooms, and Bathrooms. Below this is a 'LOCAL MARKET CONDITIONS' section with two tables: 'Listing Analysis' and 'Market Trends'.

Listing Analysis			
List Price Range	Beds/Baths	SqFt	# Homes for Sale
\$953,000 - \$2,500,000	5 / 3.8	5,000	47
\$761,000 - \$951,000	5 / 3	3,578	48
\$545,000 - \$759,000	4 / 2.6	3,254	48
\$191,000 - \$542,000	4 / 2.1	1,508	48

Market Trends			
Component	Value	Change	Trend
# Homes for Sale	190.7	-27.4	-12.6%
Price	\$758,315	\$31,135	4.3%
Days on Market	95	5.5	6.2%
New Listings	7.8	-2.9	-27.1%
Sales	11.1	-3.8	-25.8%
Price Per Square Ft	\$277	\$19	6.9%

On the right side of the interface, there is a vertical menu with several options: 'Done' (highlighted with a red box), 'Signature Fields' (expanded), 'Signature', 'Initial', 'Notary Fields' (collapsed), 'PostFill' (expanded), 'Textbox', 'Checkbox', and 'Date'. A red box highlights a close button (an 'X' in a circle) at the bottom of the menu.

Be sure to click the button down here to open the menu on the right.



eSign Console/Lender Portal

Refresh

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

The screenshot displays the eSign Console interface for a loan. The top navigation bar includes 'eSign Console - Steve Truitt', 'Scheduler', 'Monitoring', and 'Accounts'. The main header area shows loan details: Loan # 777090720220001, Primary Name John Smith, Lender Steve Truitt, and Status In Progress. Below this is a tabbed interface with 'Documents' selected. A table lists 16 documents, with the 16th document, 'appraisal', highlighted in green. A blue arrow points from the 'Documents' tab to the highlighted document, and another blue arrow points from the highlighted document to the text box below.

Document Name	ClickSigns	Page(s)	Mark(s)	Signer(s)	Completed	Signeq Document Id Document
1 Borrower's Certification, Authorization and Consent	✓	2	1	1		5092137 5103630
2 Uniform Residential Loan Application	✓	7	1	1		5092138 5103639
3 Uniform Residential Loan Application - Lender Loan Information	✓	2	0	0	✓	5092139 5103640
4 Virginia Disclosure of Terms of Mortgage Application	✓	1	1	1		5092140 5103641
5 IVES Request for Transcript of Tax Return	✓	2	2	1		5092141 5103642
6 Authorization for the Social Security Administration to Release SSN Verification		0/1	1	1		5092142 5103643
7 Housing Counselors Near You	✓	6	0	0	✓	5092143 5103644
8 Important Information About Procedures For Opening A New Account	✓	1	1	1		5092144 5103645
9 Iowa Subordination Agreement	✓	4	0	0	✓	5092145 5103646
10 Lender Record Change	✓	2	0	0	✓	5092146 5103647
11 Loan Estimate	✓	3	3	1		5092147 5103648
12 Settlement Services Provider List	✓	2	1	1		5092148 5103649
13 Virginia Hazard Insurance Disclosure	✓	1	1	1		5092149 5103650
14 Virginia Lock in Agreement	✓	2	1	1		5092150 5103651
15 Your Home Loan Toolkit	✓	28	0	0	✓	5092151 5103652
16 appraisal	✓	8	2	1		5092266 5103767

The document that you added will appear at the bottom.



eSign Console/Lender Portal

Edit Document

The pencil icon here allows you to edit a document.

The screenshot displays the eSign Console interface. On the left, a sidebar shows a list of documents under the heading "Documents". A pencil icon is highlighted in a green box next to the "Documents" header. A purple arrow points from this icon to a text box above. The main area shows a document preview for "InitialDisclosure". The document contains several sections with checkboxes and text, including "13. What is the condition of the foundation?", "14. What is the condition of the subject property landscape?", and "15. What is the overall condition of the property in relation to the other properties in the neighborhood?". There are also sections for "EXTERNAL FACTORS" and "EXTERNAL FACTOR COMMENTS". A signature of "Stephen Truitt" is visible in the comments section. At the top right of the document preview, there is a "Done" button. At the bottom of the document preview, there are "Previous Page" and "Next Page" buttons, and an "Add Internal Note" button.

A window will appear where you can go through every document and edit. Click Done at the top right when finished.



eSign Console/Lender Portal

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.

The screenshot displays the eSign Console interface for a user named Steve Truitt. The top navigation bar includes 'eSign Console - Steve Truitt' and a 'Scheduler' link. The main content area is divided into two sections: a header with loan details and a tabbed interface below.

Loan Details:

- Loan #: 777090720220001
- Primary Name: John Smith
- Type: InitialDisclosure
- Package Id: 590176
- Worksheet #: 2906 (Version : 1)
- Closing Date: 9/7/22

Lender Information:

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

Navigation Tabs: Details, Documents, Documents Received (highlighted), EMail, Versions.

Table Structure:

#	Preview	PDF	Uploaded	Document	Operation
					Add Internal Note

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The DELL logo is visible at the bottom center of the screen.



eSign Console/Lender Portal

Emails

Emails contain the invitations that you've sent out already.

eSign Console - Steve Truitt

Loan #: 777090720220001
Primary Name: John Smith
Type: InitialDisclosure
Package Id: 590176
Worksheet #: 2906 (Version : 1)
Closing Date: 9/7/22

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

Details Documents Documents Received **Emails** Versions

Emails

Created	Event	To:
9/7/22, 11:04 AM	SendInvitation	struitt@docmagic.com
9/7/22, 11:04 AM	SendInvitation	struitt@docmagic.com
9/7/22, 11:04 AM	SendInvitation	struitt@docmagic.com
9/7/22, 11:04 AM	SendInvitation	struitt@docmagic.com
9/7/22, 11:17 AM	SendInvitation	struitt@docmagic.com
9/7/22, 11:19 AM	ConsentEsign	struitt@docmagic.com
9/7/22, 11:19 AM	ConsentEsign	struitt@docmagic.com
9/7/22, 11:19 AM	RESPASatisfied	struitt@docmagic.com

Dell



eSign Console/Lender Portal

Versions

If you have different versions of the loan package, they'll be here.

eSign Console - Steve Truitt

Loan #: 777090720220001
Primary Name: John Smith
Type: InitialDisclosure
Package Id: 590176
Worksheet #: 2906 (Version : 1)
Closing Date: 9/7/22

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

Details Documents Documents Received EMails **Versions**

Versions

#	Package Type	Version	Package ID
1	Closing Documents	1	590174
2	Initial Disclosure	1	590176

DELL



eSign Console/Lender Portal

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.

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 #: 77710031350, Lender: Ron Carrillo, Status: New (Active), Documents: 15 (55 total pages), Signers: 3, Expires: N/A (Requires: Primary), Signatures: Y.
- Participants Table:** A table with columns: #, Name/Email, Role, Created, Started, Consented, Viewed, Completed, Declined, and Links. All 'Created' and 'Started' timestamps are 10/3/22 1:54 PM.
- Action Log:** A table with columns: Date, User, IP Address, and Description. It shows three entries: 'eSign event created', 'Invitation sent to ron@docmagic.com', and 'Invitation sent to ron@docmagic.com', all dated 10/3/22 1:54 PM.

#	Name/Email	Role	Created	Started	Consented	Viewed	Completed	Declined	Links
1	John Smith ron@docmagic.com	Borrower	10/3/22 1:54 PM						<input type="checkbox"/> Send Email <input type="checkbox"/> Sign Documents
3	Andy Agent ron@docmagic.com	Settlement Agent	10/3/22 1:54 PM						<input type="checkbox"/> Send Email <input type="checkbox"/> Agent Portal
4	Notary_name_placeholder -1 NOTARY_EMAIL_PLACEHOLDER-1	Notary	10/3/22 1:54 PM						<input type="checkbox"/> Send Email

Date	User	IP Address	Description
10/3/22 1:54 PM	System User		eSign event created
10/3/22 1:54 PM	John Smith		Invitation sent to ron@docmagic.com
10/3/22 1:54 PM	Andy Agent		Invitation sent to ron@docmagic.com

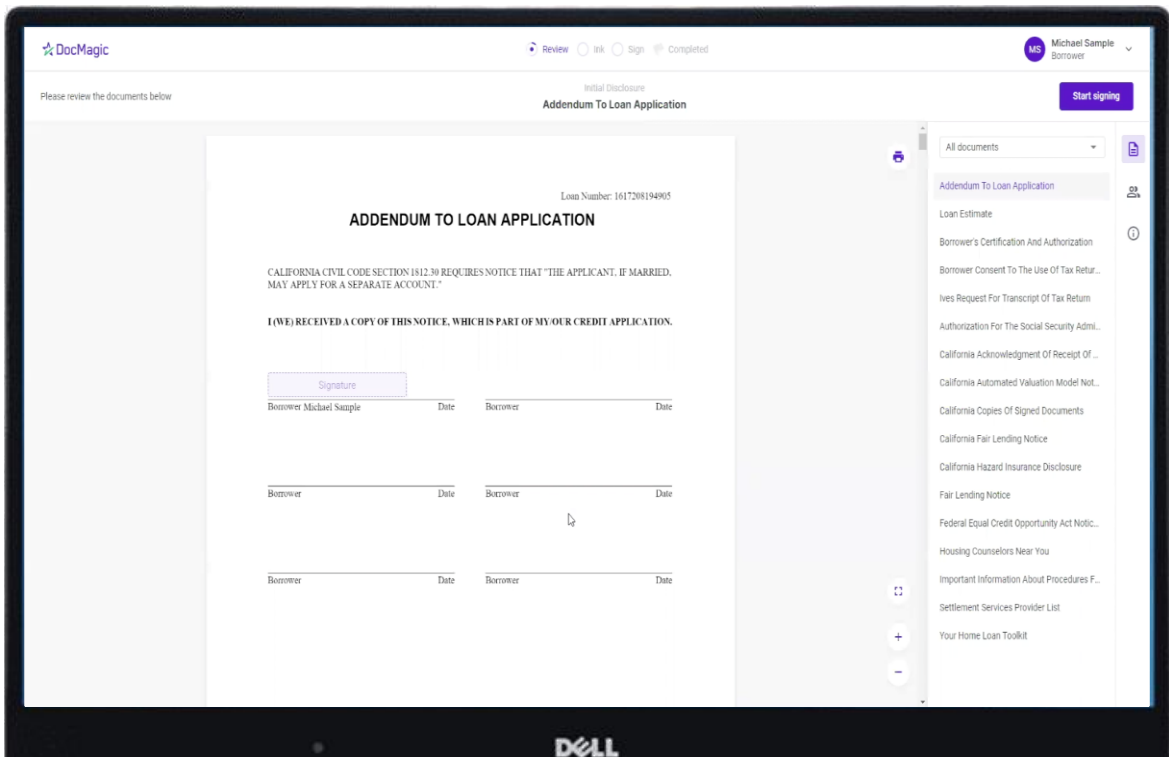
The timestamps will populate as the participants start the process, give their consent, view the documents, and then either complete their signing or decline to sign.



eSign Console/Lender Portal

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.



Here, the borrower will be able to sign the necessary documents. For more information on the borrower's signing experience, please visit our [Product Training Page](#).



eSign Console/Lender Portal

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.

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 # 777090720220001, Lender: Steve Truitt (DSI TEST LENDER (SALES) (100SALES)), Status: In Progress (Active), Documents: 16 (72 total pages), Signers: 3, Expires: N/A (Requires: Primary), Signatures: Y (Ink Sign).
- Participants Table:** A table with columns for ID, Name/Email, Role, Created, Started, Consented, Viewed, Completed, Declined, and Links. The 'Created' column for the borrower (John Smith) is highlighted with a green box.
- Action Log Table:** A table with columns for Date, User, IP Address, and Description. The log shows various events such as 'eSign event created', 'Invitation sent to struitt@docmagic.com', 'Consented to DocMagic eSign', and 'Receipt of early disclosures within 3 business days met'.

The Action Log documents all the changes that occur.



eSign Console/Lender Portal

Icons

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

The screenshot displays the eSign Console interface for a loan package. The top navigation bar includes links for Scheduler, Monitoring, Accounts, eSign Requests, Create Request, Search, and a user profile icon. The header section shows the following details:

- Loan #: 777090720220001
- Lender: Steve Truitt (DSI TEST LENDER (SALES) (100SALES))
- Status: In Progress (Active)
- Primary Name: John Smith
- Type: Initial Disclosure
- Documents: 16 (72 total pages)
- Package Id: 590176
- Signers: 3
- Worksheet #: 2906 (Version: 1)
- Expires: N/A (Requires: Primary)
- Closing Date: 9/7/22
- Signatures: Y (Ink Sign)

The 'Participants' table lists the following individuals:

#	Name/Email	Role	Created	Started	Consented	Viewed	Completed
1	John Smith struitt@docmagic.com	Borrower	9/7/22 11:04 AM	9/7/22 11:19 AM	9/7/22 11:19 AM	9/7/22 11:19 AM	9/7/22 11:19 AM
3	Andy Agent struitt@docmagic.com	Settlement Agent	9/7/22 11:04 AM				
4	Stephen Truitt struitt21@gmail.com	Other	9/7/22 11:17 AM				

The 'Action Log' table provides a detailed history of events:

Date	User	IP Address	Description
9/7/22 11:04 AM	System User		eSign event created
9/7/22 11:04 AM	John Smith		Invitation sent to struitt@docmagic.com
9/7/22 11:04 AM	Andy Agent		Invitation sent to struitt@docmagic.com
9/7/22 11:17 AM	Steve Truitt		Stephen Truitt (struitt21@gmail.com) added as Other
9/7/22 11:17 AM	Stephen Truitt		Invitation sent to struitt21@gmail.com
9/7/22 11:19 AM	John Smith		Consented to DocMagic eSign
9/7/22 11:19 AM	John Smith		Receipt of early disclosures within 3 business days met
9/7/22 11:19 AM	John Smith		eSign event started
9/7/22 11:19 AM	John Smith		Initial Disclosure version 1 prepared on September 07, 2022, 11:04 AM PDT displayed
9/7/22 11:22 AM	Steve Truitt		Document batch upload completed
9/7/22 11:30 AM	System User		Date: 2022-09-07 11:30:09 InkSign Fax received for document: 5103643 ()
9/7/22 11:30 AM	John Smith		Authorization for the Social Security Administration to Release SSN Verification signed by John Smith
9/7/22 11:31 AM	John Smith		Approved electronic representation of signature
9/7/22 11:31 AM	John Smith		Approved electronic representation of signature
9/7/22 11:31 AM	John Smith		Borrower's Certification, Authorization and Consent signed by JOHN SMITH
9/7/22 11:31 AM	John Smith		Uniform Residential Loan Application signed by JOHN SMITH
9/7/22 11:31 AM	John Smith		Virginia Disclosure of Terms of Mortgage Application signed by JOHN SMITH
9/7/22 11:31 AM	John Smith		IVES Request for Transcript of Tax Return signed by JOHN SMITH
9/7/22 11:31 AM	John Smith		Important Information About Procedures For Opening A New Account signed by JOHN SMITH

The toolbar at the top right of the main content area contains several icons: a green arrow pointing right, a PDF icon, a gold medal icon, a printer icon, a green circular refresh icon, and a yellow padlock icon. A blue arrow points from the text box above to the padlock icon, and another blue arrow points from the text box below to the refresh icon.

You can reset the PDF by clicking here – this makes all the fields blank again.



eSign Console/Lender Portal

Icons

The printer opens your printing options.

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 loan summary shows Loan # 777090720220001, Lender Steve Truitt, and Status In Progress (Active). The Participants table lists John Smith (Borrower), Andy Agent (Settlement Agent), and Stephen Truitt (Other). The Action Log shows a series of events from 9/7/22 11:04 AM to 11:31 AM, including document uploads and signatures.

#	Name/Email	Role	Created	Started	Consented	Viewed	Completed
1	John Smith struitt@docmagic.com	Borrower	9/7/22 11:04 AM	9/7/22 11:19 AM	9/7/22 11:19 AM	9/7/22 11:19 AM	9/7/22 11:19 AM
3	Andy Agent struitt@docmagic.com	Settlement Agent	9/7/22 11:04 AM				
4	Stephen Truitt struitt21@gmail.com	Other	9/7/22 11:17 AM				

Date	User	IP Address	Description
9/7/22 11:04 AM	System User		eSign event created
9/7/22 11:04 AM	John Smith		Invitation sent to struitt@docmagic.com
9/7/22 11:04 AM	Andy Agent		Invitation sent to struitt@docmagic.com
9/7/22 11:17 AM	Steve Truitt		Stephen Truitt (struitt21@gmail.com) added as Other
9/7/22 11:17 AM	Stephen Truitt		Invitation sent to struitt21@gmail.com
9/7/22 11:19 AM	John Smith		Consented to DocMagic eSign
9/7/22 11:19 AM	John Smith		Receipt of early disclosures within 3 business days met
9/7/22 11:19 AM	John Smith		eSign event started
9/7/22 11:19 AM	John Smith		Initial Disclosure version 1 prepared on September 07, 2022, 11:04 AM PDT displayed
9/7/22 11:22 AM	Steve Truitt		Document batch upload completed
9/7/22 11:30 AM	System User		Date: 2022-09-07 11:30:09 InkSign Fax received for document: 5103643 ()
9/7/22 11:30 AM	John Smith		Authorization for the Social Security Administration to Release SSN Verification signed by John Smith
9/7/22 11:31 AM	John Smith		Approved electronic representation of signature
9/7/22 11:31 AM	John Smith		Approved electronic representation of signature
9/7/22 11:31 AM	John Smith		Borrower's Certification, Authorization and Consent signed by JOHN SMITH
9/7/22 11:31 AM	John Smith		Uniform Residential Loan Application signed by JOHN SMITH
9/7/22 11:31 AM	John Smith		Virginia Disclosure of Terms of Mortgage Application signed by JOHN SMITH
9/7/22 11:31 AM	John Smith		IVES Request for Transcript of Tax Return signed by JOHN SMITH
9/7/22 11:31 AM	John Smith		Important Information About Procedures For Opening A New Account signed by JOHN SMITH

You can view the DocMagic eSign certificate by clicking here.



eSign Console/Lender Portal

Certificate

The certificate mentioned previously downloads or opens as a PDF.

DocMagic eSign Certificate

eSign Id:	590176	Reference Id:	2906	From:	STEVE TRUITT	Status:	In Progress
Documents Type:	INITIAL DISCLOSURE	Loan Id:	777090720220001	Documents:	16	Signatures:	Y

List of Signers

Name/Email	Signature	Created Date	Started Date	Consented Date	Viewed Date	Completed Date
JOHN SMITH strutt@docmagic.com		09/07/22 11:04:27 AM	09/07/22 11:19:40 AM	09/07/22 11:19:40 AM	09/07/22 11:19:40 AM	09/07/22 11:31:52 AM
ANDY AGENT strutt@docmagic.com		09/07/22 11:04:28 AM				
STEPHEN TRUITT strutt221@gmail.com		09/07/22 11:17:26 AM				

Audit Log

Date/Time	Person	IP Address	Action
09/07/22 11:04:27 AM	SYSTEM USER		eSign event created
09/07/22 11:04:27 AM	JOHN SMITH	10.1.138.24	Invitation sent to strutt@docmagic.com
09/07/22 11:04:28 AM	ANDY AGENT	10.1.138.24	Invitation sent to strutt@docmagic.com
09/07/22 11:17:26 AM	STEPHEN TRUITT	10.1.10.201	Stephen Trutt (strutt221@gmail.com) added as Other
09/07/22 11:17:26 AM	STEPHEN TRUITT	10.1.10.201	Invitation sent to strutt221@gmail.com
09/07/22 11:19:39 AM	JOHN SMITH	10.1.10.201	Consented to DocMagic eSign
09/07/22 11:19:40 AM	JOHN SMITH	10.1.10.201	Receipt of early disclosures within 3 business days met
09/07/22 11:19:41 AM	JOHN SMITH	10.1.10.201	eSign event started
09/07/22 11:19:41 AM	JOHN SMITH	10.1.10.201	Initial Disclosure version 1 prepared on September 07, 2022, 11:04 AM PDT displayed
09/07/22 11:22:34 AM	STEVE TRUITT	10.1.138.22	Document batch upload completed
09/07/22 11:30:11 AM	SYSTEM USER		Date: 2022-09-07 11:30:09 InkSign Fax received for document: 5103643 ()



eSign Console/Lender Portal

Icons

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

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 loan summary shows Loan # 717090720220001, Lender Steve Truitt, and Status In Progress (Active). The Participants table lists John Smith (Borrower), Andy Agent (Settlement Agent), and Stephen Truitt (Other). The Action Log shows a series of events from 9/7/22 11:04 AM to 11:31 AM, including document creation, invitation sending, consent, and document signing.

#	Name/Email	Role	Created	Started	Consented	Viewed	Completed
1	John Smith struitt@docmagic.com	Borrower	9/7/22 11:04 AM	9/7/22 11:19 AM	9/7/22 11:19 AM	9/7/22 11:19 AM	9/7/22 11:19 AM
3	Andy Agent struitt@docmagic.com	Settlement Agent	9/7/22 11:04 AM				
4	Stephen Truitt struitt21@gmail.com	Other	9/7/22 11:17 AM				

Date	User	IP Address	Description
9/7/22 11:04 AM	System User		eSign event created
9/7/22 11:04 AM	John Smith		Invitation sent to struitt@docmagic.com
9/7/22 11:04 AM	Andy Agent		Invitation sent to struitt@docmagic.com
9/7/22 11:17 AM	Steve Truitt		Stephen Truitt (struitt21@gmail.com) added as Other
9/7/22 11:17 AM	Stephen Truitt		Invitation sent to struitt21@gmail.com
9/7/22 11:19 AM	John Smith		Consented to DocMagic eSign
9/7/22 11:19 AM	John Smith		Receipt of early disclosures within 3 business days met
9/7/22 11:19 AM	John Smith		eSign event started
9/7/22 11:19 AM	John Smith		Initial Disclosure version 1 prepared on September 07, 2022, 11:04 AM PDT displayed
9/7/22 11:22 AM	Steve Truitt		Document batch upload completed
9/7/22 11:30 AM	System User		Date: 2022-09-07 11:30:09 InkSign Fax received for document: 5103643 ()
9/7/22 11:30 AM	John Smith		Authorization for the Social Security Administration to Release SSN Verification signed by John Smith
9/7/22 11:31 AM	John Smith		Approved electronic representation of signature
9/7/22 11:31 AM	John Smith		Approved electronic representation of signature
9/7/22 11:31 AM	John Smith		Borrower's Certification, Authorization and Consent signed by JOHN SMITH
9/7/22 11:31 AM	John Smith		Uniform Residential Loan Application signed by JOHN SMITH
9/7/22 11:31 AM	John Smith		Virginia Disclosure of Terms of Mortgage Application signed by JOHN SMITH
9/7/22 11:31 AM	John Smith		IVES Request for Transcript of Tax Return signed by JOHN SMITH
9/7/22 11:31 AM	John Smith		Important Information About Procedures For Opening A New Account signed 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.



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.

eSign Console - Steve Truitt

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

Loan #: 777090720220001 Lender: Steve Truitt (DSI TEST LENDER (SALES) (100SALES)) Status: In Progress (Active)
Primary Name: John Smith Documents: 16 (72 total pages)
Type: InitialDisclosure Signers: 3
Package Id: 590176 Expires: N/A (Requires: Primary)
Worksheet #: 2906 (Version: 1) Closing Date: 9/7/22 Signatures: Y (Ink Sign)

Details Documents Documents Received EMail Versions

Participants

#	Name/Email	Role	Created	Started	Consented	Viewed	Completed	Declined	Links	Preview Mode - Off
1	John Smith struitt@docmagic.com	Borrower	9/7/22 11:04 AM	9/7/22 11:19 AM	9/7/22 11:19 AM	9/7/22 11:19 AM	9/7/22 11:31 AM		Send Email Sign Documents	4506-C
3	Andy Agent struitt@docmagic.com	Settlement Agent	9/7/22 11:04 AM						Send Email Agent Portal	
4	Stephen Truitt struitt21@gmail.com	Other	9/7/22 11:17 AM						Send Email Sign Documents	

Action Log

Date	User	IP Address	Description
9/7/22 11:04 AM	System User		eSign event created
9/7/22 11:04 AM	John Smith		Invitation sent to struitt@docmagic.com
9/7/22 11:04 AM	Andy Agent		Invitation sent to struitt@docmagic.com
9/7/22 11:17 AM	Steve Truitt		Stephen Truitt (struitt21@gmail.com) added as Other
9/7/22 11:17 AM	Stephen Truitt		Invitation sent to struitt21@gmail.com
9/7/22 11:19 AM	John Smith		Consented to DocMagic eSign
9/7/22 11:19 AM	John Smith		Receipt of early disclosures within 3 business days met
9/7/22 11:19 AM	John Smith		eSign event started
9/7/22 11:19 AM	John Smith		Initial Disclosure version 1 prepared on September 07, 2022, 11:04 AM PDT displayed
9/7/22 11:22 AM	Steve Truitt		Document batch upload completed
9/7/22 11:30 AM	System User		Date: 2022-09-07 11:30:09 InkSign Fax received for document: 5103643 ()
9/7/22 11:30 AM	John Smith		Authorization for the Social Security Administration to Release SSN Verification signed by John Smith
9/7/22 11:31 AM	John Smith		Approved electronic representation of signature
9/7/22 11:31 AM	John Smith		Approved electronic representation of signature
9/7/22 11:31 AM	John Smith		Borrower's Certification, Authorization and Consent signed by JOHN SMITH
9/7/22 11:31 AM	John Smith		Uniform Residential Loan Application signed by JOHN SMITH
9/7/22 11:31 AM	John Smith		Virginia Disclosure of Terms of Mortgage Application signed by JOHN SMITH
9/7/22 11:31 AM	John Smith		IVES Request for Transcript of Tax Return signed by JOHN SMITH
9/7/22 11:31 AM	John Smith		Important Information About Procedures For Opening A New Account signed by JOHN SMITH



eSign Console/Lender Portal

Create Request

Fill out the necessary information and attach your document(s). Clicking Prepare your document sends it through the AutoPrep.

The screenshot shows the 'eSign Console - Steve Truitt' interface. The top navigation bar includes 'Create Request', 'Search', and 'Account'. The form is divided into several sections: 'From: (You)' with fields for Email Address, First, Middle, Last, and Suffix; 'To: (Signers)' with fields for Email Address, First, Middle, Last, Suffix, and Code; 'Documents' with an 'Attach' button and a highlighted 'Prepare your document' button; 'Subject: optional' and 'Message: optional' text areas; and a checkbox for 'I have read and agree to the Terms of Use.'. At the bottom, there are 'Clear' and 'Submit' buttons. A blue arrow points from the 'Prepare your document' button to the 'Submit' button.

Hit the Submit button at the bottom when you're done.

