

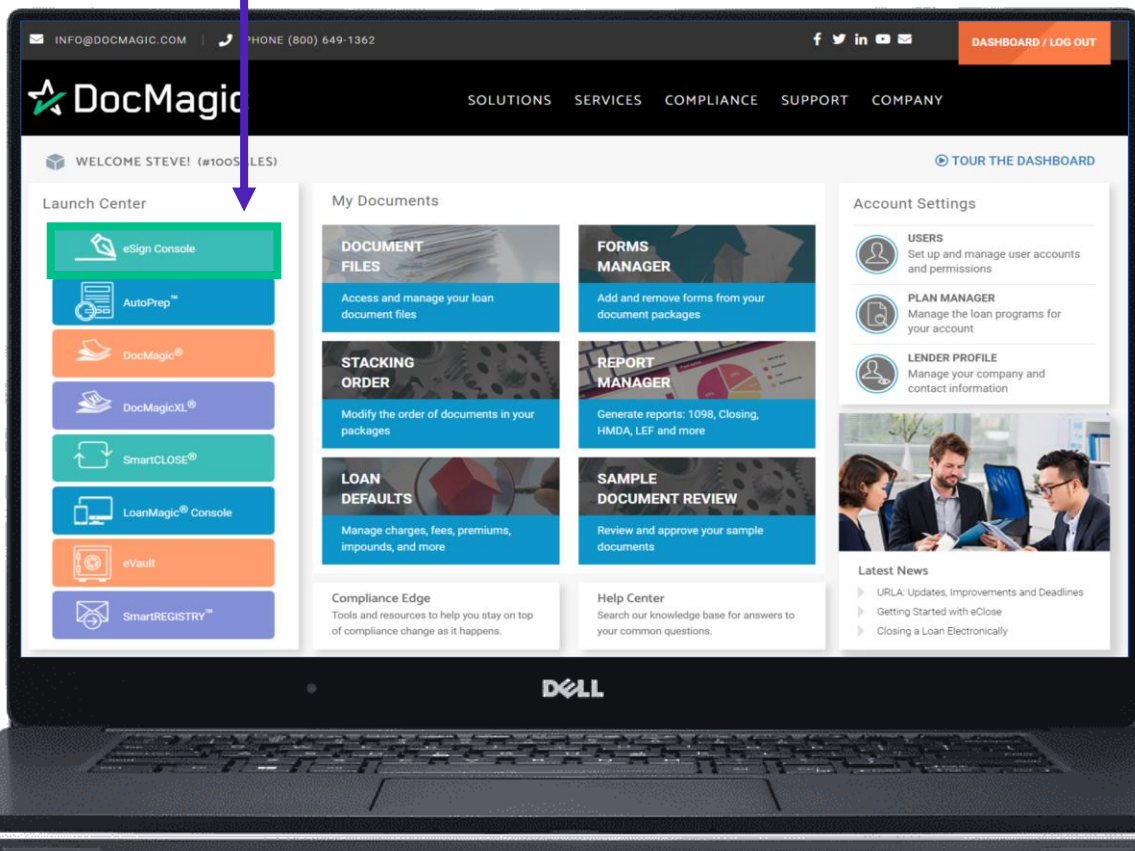


eSign Console
Lender Portal

eSign Console/Lender Portal

Getting Started

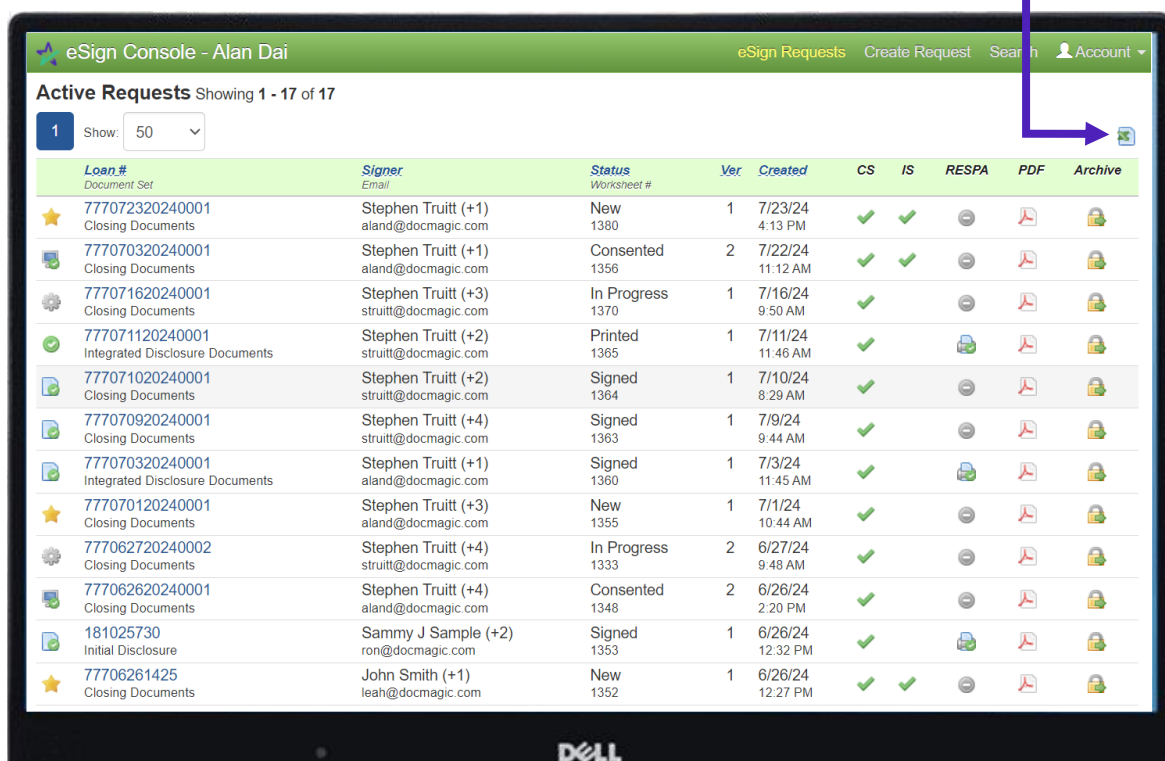
Login to DocMagic and open the eSign Console from the Launch Center.



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. You can also export this information as a csv.



eSign Console - Alan Dai eSign Requests Create Request Search Account

Active Requests Showing 1 - 17 of 17

1 Show: 50

Loan # Document Set	Signer Email	Status Worksheet #	Ver	Created	CS	IS	RESPA	PDF	Archive
★ 77707230240001 Closing Documents	Stephen Truitt (+1) aland@docmagic.com	New 1380	1	7/23/24 4:13 PM	✓	✓	⊖	📄	🔒
📁 777070320240001 Closing Documents	Stephen Truitt (+1) aland@docmagic.com	Consented 1356	2	7/22/24 11:12 AM	✓	✓	⊖	📄	🔒
⚙️ 777071620240001 Closing Documents	Stephen Truitt (+3) struitt@docmagic.com	In Progress 1370	1	7/16/24 9:50 AM	✓		⊖	📄	🔒
✅ 777071120240001 Integrated Disclosure Documents	Stephen Truitt (+2) struitt@docmagic.com	Printed 1365	1	7/11/24 11:46 AM	✓		📄	📄	🔒
📄 777071020240001 Closing Documents	Stephen Truitt (+2) struitt@docmagic.com	Signed 1364	1	7/10/24 8:29 AM	✓		⊖	📄	🔒
📄 777070920240001 Closing Documents	Stephen Truitt (+4) struitt@docmagic.com	Signed 1363	1	7/9/24 9:44 AM	✓		⊖	📄	🔒
📄 777070320240001 Integrated Disclosure Documents	Stephen Truitt (+1) aland@docmagic.com	Signed 1360	1	7/3/24 11:45 AM	✓		📄	📄	🔒
★ 777070120240001 Closing Documents	Stephen Truitt (+3) aland@docmagic.com	New 1355	1	7/1/24 10:44 AM	✓		⊖	📄	🔒
⚙️ 777062720240002 Closing Documents	Stephen Truitt (+4) struitt@docmagic.com	In Progress 1333	2	6/27/24 9:48 AM	✓		⊖	📄	🔒
📁 777062620240001 Closing Documents	Stephen Truitt (+4) aland@docmagic.com	Consented 1348	2	6/26/24 2:20 PM	✓		⊖	📄	🔒
📄 181025730 Initial Disclosure	Sammy J Sample (+2) ron@docmagic.com	Signed 1353	1	6/26/24 12:32 PM	✓		📄	📄	🔒
★ 77706261425 Closing Documents	John Smith (+1) leah@docmagic.com	New 1352	1	6/26/24 12:27 PM	✓	✓	⊖	📄	🔒

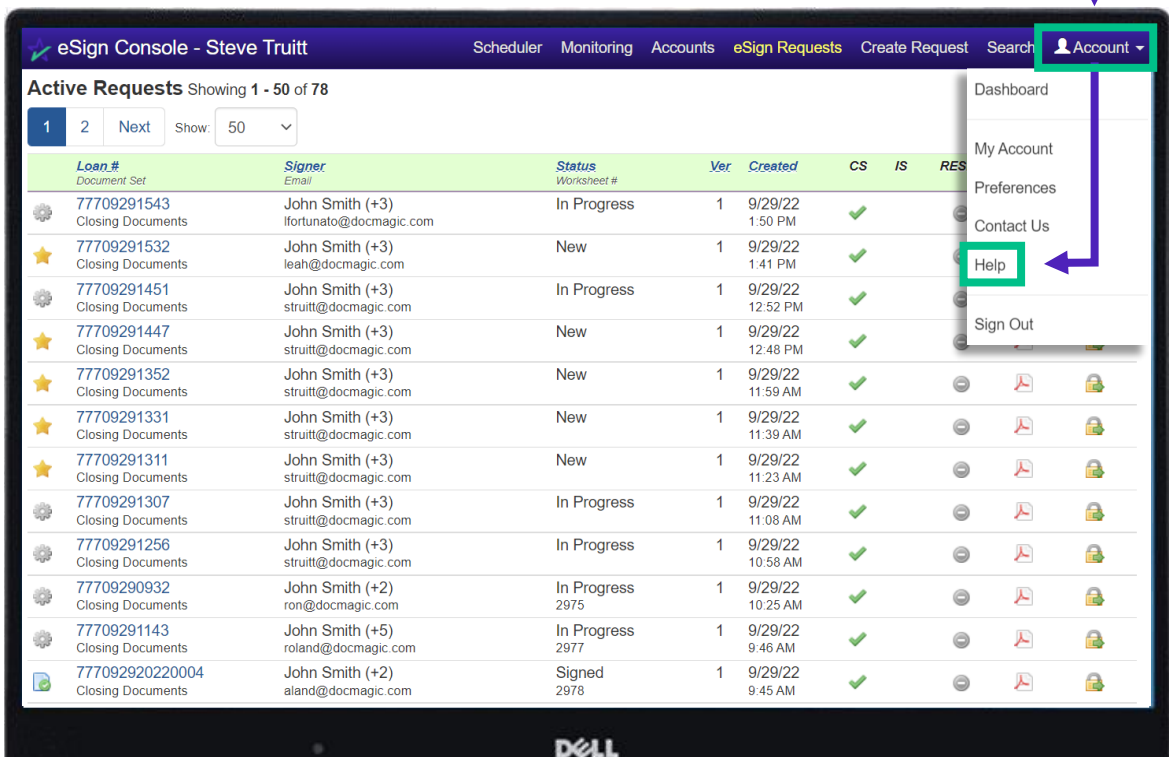
It's crucial that you know that these loan packages will only be present on this console for 90 days after generation. After all signatures are collected, it's a good idea to download all signed documents to your desktop. This will be shown towards the end of the guide.



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 displays the eSign Console interface for Steve Truitt. The top navigation bar includes links for 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 and a purple arrow pointing to it from the text box above. Below the navigation bar, the 'Active Requests' section shows a table of 15 requests. The table has columns for Loan #, Document Set, Signer, Status, Ver., Created, CS, IS, and RES. The requests are listed in descending order of creation date, with the most recent at the top.

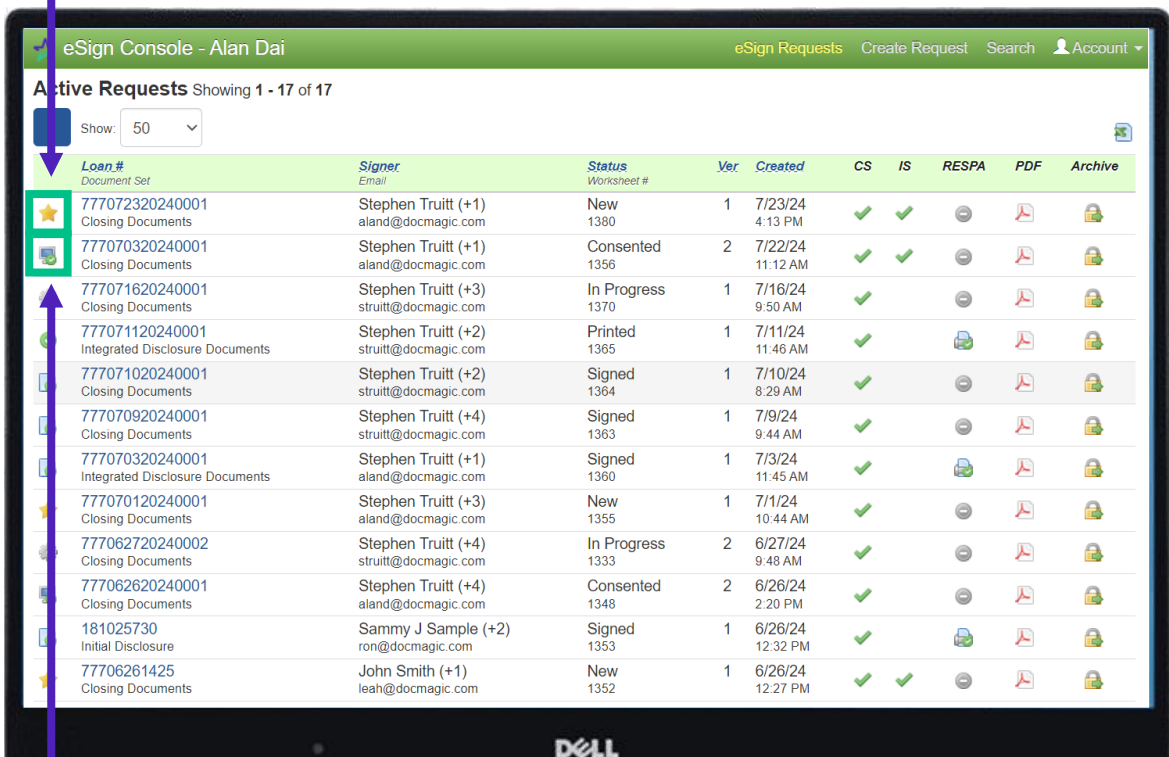
Loan #	Document Set	Signer	Status	Ver.	Created	CS	IS	RES
77709291543	Closing Documents	John Smith (+3) lfortunato@docmagic.com	In Progress	1	9/29/22 1:50 PM	✓		
77709291532	Closing Documents	John Smith (+3) leah@docmagic.com	New	1	9/29/22 1:41 PM	✓		
77709291451	Closing Documents	John Smith (+3) struitt@docmagic.com	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	✓		
77709292020004	Closing Documents	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 icon means that the set has just been processed (it's new).



eSign Console - Alan Dai

eSign Requests Create Request Search Account

Active Requests Showing 1 - 17 of 17

Show: 50

Loan# Document Set	Signer Email	Status Worksheet #	Ver	Created	CS	IS	RESPA	PDF	Archive
777072320240001 Closing Documents	Stephen Truitt (+1) aland@docmagic.com	New 1380	1	7/23/24 4:13 PM	✓	✓	⊖	📄	🔒
777070320240001 Closing Documents	Stephen Truitt (+1) aland@docmagic.com	Consented 1356	2	7/22/24 11:12 AM	✓	✓	⊖	📄	🔒
777071620240001 Closing Documents	Stephen Truitt (+3) struitt@docmagic.com	In Progress 1370	1	7/16/24 9:50 AM	✓		⊖	📄	🔒
777071120240001 Integrated Disclosure Documents	Stephen Truitt (+2) struitt@docmagic.com	Printed 1365	1	7/11/24 11:46 AM	✓		📄	📄	🔒
777071020240001 Closing Documents	Stephen Truitt (+2) struitt@docmagic.com	Signed 1364	1	7/10/24 8:29 AM	✓		⊖	📄	🔒
777070920240001 Closing Documents	Stephen Truitt (+4) struitt@docmagic.com	Signed 1363	1	7/9/24 9:44 AM	✓		⊖	📄	🔒
777070320240001 Integrated Disclosure Documents	Stephen Truitt (+1) aland@docmagic.com	Signed 1360	1	7/3/24 11:45 AM	✓		📄	📄	🔒
777070120240001 Closing Documents	Stephen Truitt (+3) aland@docmagic.com	New 1355	1	7/1/24 10:44 AM	✓		⊖	📄	🔒
777062720240002 Closing Documents	Stephen Truitt (+4) struitt@docmagic.com	In Progress 1333	2	6/27/24 9:48 AM	✓		⊖	📄	🔒
777062620240001 Closing Documents	Stephen Truitt (+4) aland@docmagic.com	Consented 1348	2	6/26/24 2:20 PM	✓		⊖	📄	🔒
181025730 Initial Disclosure	Sammy J Sample (+2) ron@docmagic.com	Signed 1353	1	6/26/24 12:32 PM	✓		📄	📄	🔒
77706261425 Closing Documents	John Smith (+1) leah@docmagic.com	New 1352	1	6/26/24 12:27 PM	✓	✓	⊖	📄	🔒

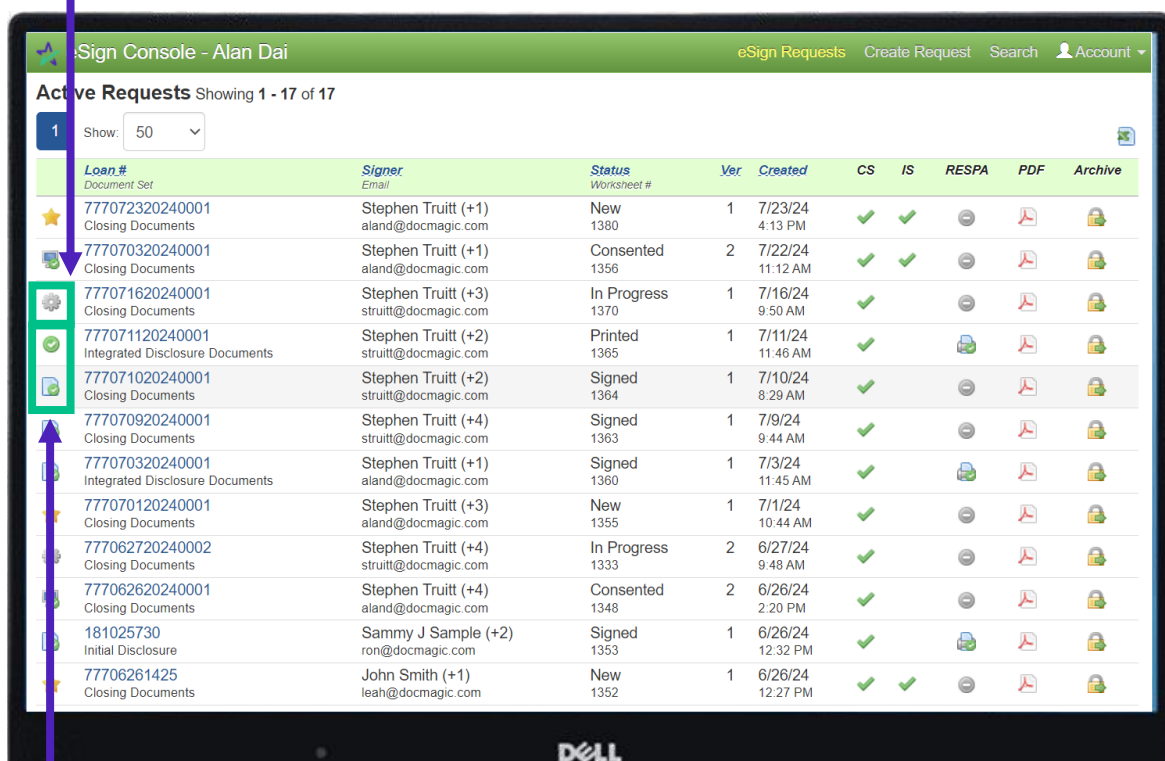
The computer monitor with the check mark indicates that the participant(s) have consented to the use of electronic signatures and eSign.



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.



eSign Console - Alan Dai eSign Requests Create Request Search Account

Active Requests Showing 1 - 17 of 17

Show: 50

Loan # Document Set	Signer Email	Status Worksheet #	Ver	Created	CS	IS	RESPA	PDF	Archive
777072320240001 Closing Documents	Stephen Truitt (+1) aland@docmagic.com	New 1380	1	7/23/24 4:13 PM	✓	✓	⊖	📄	🔒
777070320240001 Closing Documents	Stephen Truitt (+1) aland@docmagic.com	Consented 1356	2	7/22/24 11:12 AM	✓	✓	⊖	📄	🔒
777071620240001 Closing Documents	Stephen Truitt (+3) struitt@docmagic.com	In Progress 1370	1	7/16/24 9:50 AM	✓		⊖	📄	🔒
777071120240001 Integrated Disclosure Documents	Stephen Truitt (+2) struitt@docmagic.com	Printed 1365	1	7/11/24 11:46 AM	✓		📄	📄	🔒
777071020240001 Closing Documents	Stephen Truitt (+2) struitt@docmagic.com	Signed 1364	1	7/10/24 8:29 AM	✓		⊖	📄	🔒
777070920240001 Closing Documents	Stephen Truitt (+4) struitt@docmagic.com	Signed 1363	1	7/9/24 9:44 AM	✓		⊖	📄	🔒
777070320240001 Integrated Disclosure Documents	Stephen Truitt (+1) aland@docmagic.com	Signed 1360	1	7/3/24 11:45 AM	✓		📄	📄	🔒
777070120240001 Closing Documents	Stephen Truitt (+3) aland@docmagic.com	New 1355	1	7/1/24 10:44 AM	✓		⊖	📄	🔒
777062720240002 Closing Documents	Stephen Truitt (+4) struitt@docmagic.com	In Progress 1333	2	6/27/24 9:48 AM	✓		⊖	📄	🔒
777062620240001 Closing Documents	Stephen Truitt (+4) aland@docmagic.com	Consented 1348	2	6/26/24 2:20 PM	✓		⊖	📄	🔒
181025730 Initial Disclosure	Sammy J Sample (+2) ron@docmagic.com	Signed 1353	1	6/26/24 12:32 PM	✓		📄	📄	🔒
77706261425 Closing Documents	John Smith (+1) leah@docmagic.com	New 1352	1	6/26/24 12:27 PM	✓	✓	⊖	📄	🔒

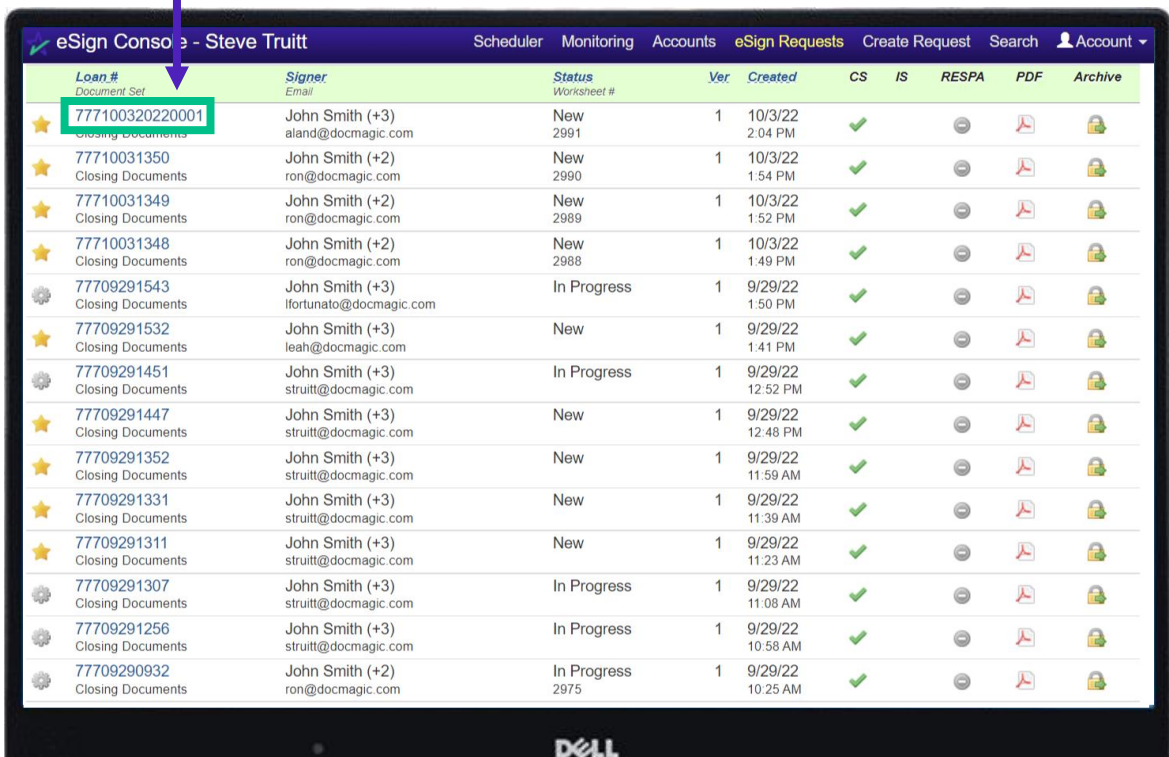
The piece of paper with the check mark indicates that the set has been completed and signed. Meanwhile, the *full checkmark* indicates that the document set has been completed, signed, and *printed*.



eSign Console/Lender Portal

Opening a Document Set

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



eSign Console - Steve Truitt

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

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 Steve Truitt. The top navigation bar includes links for Scheduler, Monitoring, Accounts, eSign Requests, Create Request, Search, and Account. A 'Return to Search' link is also present.

Loan Details:

- 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 LENDER (SALES) (100SALES)
- ron@docmagic.com
- (708)531-9060
- Status: New (Active)
- Documents: 15 (55 total pages)
- Signers: 3
- Expires: N/A (Requires: Primary)
- Signatures: Y

Participants:

#	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:

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

Buttons at the bottom: Add Internal Note, Cancel Request, Delete Request.

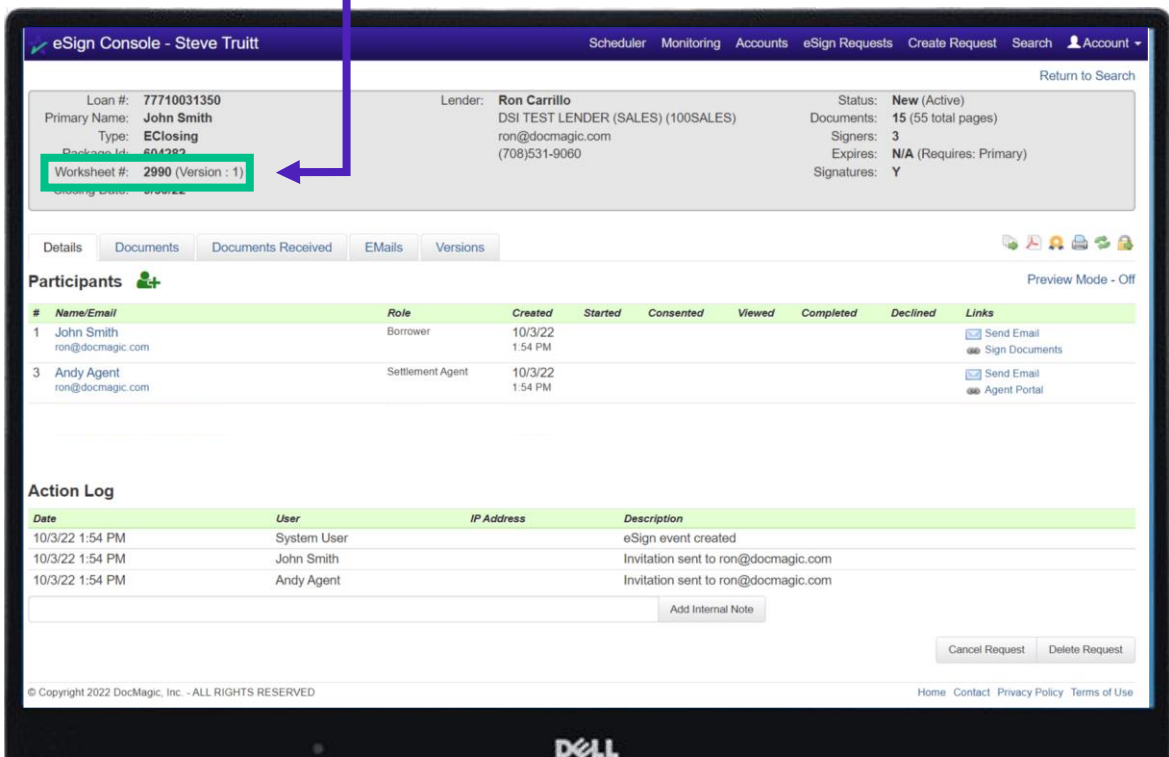
Footer: © Copyright 2022 DocMagic, Inc. - ALL RIGHTS RESERVED. Home Contact Privacy Policy Terms of Use.



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.



eSign Console - Steve Truitt

Scheduler Monitoring Accounts eSign Requests Create Request Search Account

Return to Search

Loan #: 77710031350
Primary Name: John Smith
Type: EClosing
Package Id: 604282
Worksheet #: 2990 (Version: 1)
Closing Date: 10/3/22

Lender: Ron Carrillo
DSI TEST LENDER (SALES) (100SALES)
ron@docmagic.com
(708)531-9060

Status: New (Active)
Documents: 15 (55 total pages)
Signers: 3
Expires: N/A (Requires: Primary)
Signatures: Y

Details Documents Documents Received EMail Versions

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

Action Log

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

Add Internal Note

Cancel Request Delete Request

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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.

eSign Console - Steve Truitt

Scheduler Monitoring Accounts eSign Requests Create Request Search Account

Return to Search

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 LENDER (SALES) (100SALES)
ron@docmagic.com
(708)531-9060

Status: New (Active)
Documents: 15 (55 total pages)
Signers: 3
Expires: N/A (Requires: Primary)
Signatures: Y

Details Documents Documents Received EMail Versions

Participants

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

Action Log

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

Add Internal Note

Cancel Request Delete Request

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DELL

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 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 details for a loan (Loan #: 77710031350, Lender: Ron Carrillo) and a list of participants. The 'Participants' table has 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 'Links' column for each participant contains 'Send Email' and 'Sign Documents' links. A blue arrow points from the 'Send Email' link for John Smith to a text box above. Another blue arrow points from the 'Sign Documents' link for John Smith to a text box below. The 'Action Log' section at the bottom shows a list of events, including 'eSign event created' and 'Invitation sent to ron@docmagic.com'. The footer includes copyright information and a Dell logo.

#	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

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 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 lists two participants: John Smith (Borrower) and Andy Agent (Settlement Agent). The 'Links' column for Andy Agent shows a link to the 'Agent Portal', which is highlighted with a green box. A purple arrow points from the text box above to this link. The 'Action Log' section at the bottom shows a list of events, including 'eSign event created' and 'Invitation sent to ron@docmagic.com'. The footer includes 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

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



eSign Console/Lender Portal

Adding Participants

Click here to add participants.

The screenshot displays the eSign Console interface for Steve Truitt. A modal window titled "Add Participant" is open, prompting the user to provide information for a new participant. The modal contains the following fields:

- First Name:
- Last Name:
- Email:
- Access Code:
- Role:

At the bottom of the modal are "Add" and "Cancel" buttons. A green box highlights the "Add" button, with an arrow pointing to it from the instruction box below. The background interface shows loan details for Loan # 7710031350, Lender: Ron Carrillo, and a list of participants including John Smith and Andy Agent. The Action Log at the bottom shows system events.

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.

eSign Console - Steve Truitt

Scheduler Monitoring Accounts eSign Requests Create Request Search Account

Loan #: 77710031350 Lender: Ron Carrillo Status: New (Active)
Primary Name: John Smith DSI TEST LENDER (SALES) (100SALES) Documents: 15 (55 total pages)
Type: EClosing ron@docmagic.com Signers: 3
Package Id: 604282 Expires: N/A (Requires: Primary)
Worksheet #: 2990 (Version : 1) Signatures: Y
Closing Date: 9/30/22

Details Documents Documents Received EMails Versions

Participants Preview 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 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

Action Log

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

Add Internal Note

Cancel Request Delete Request

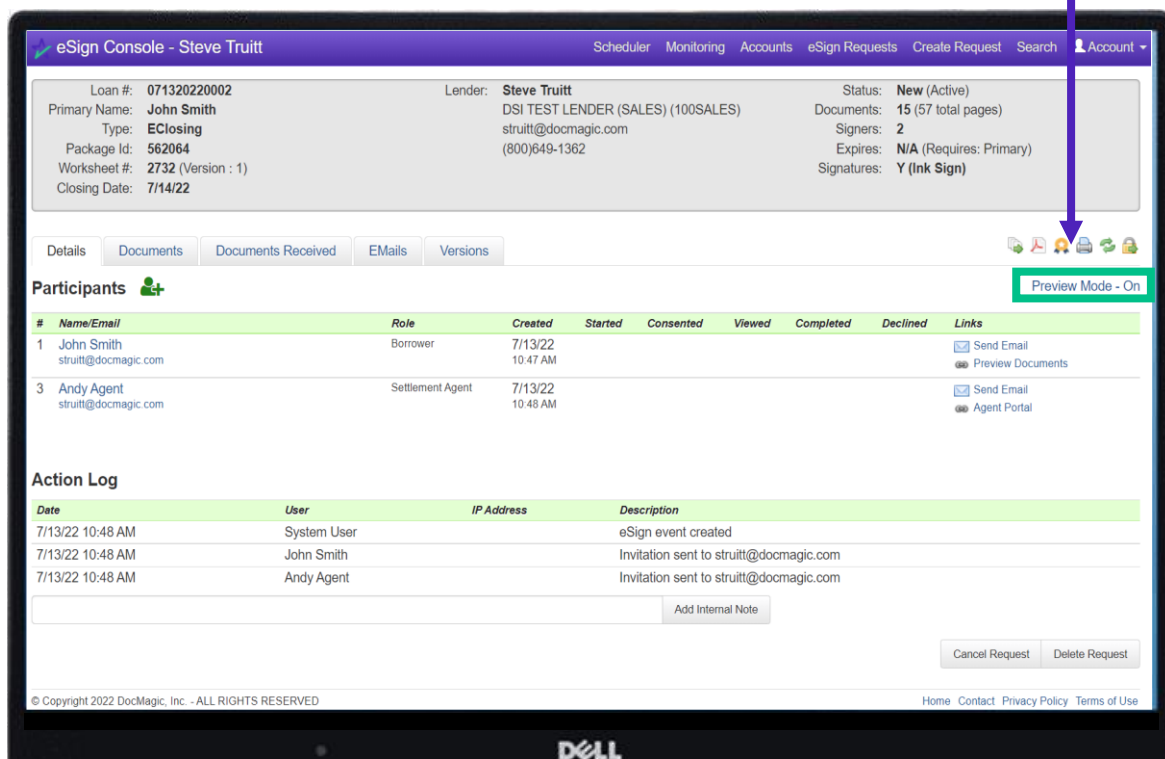
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eSign Console/Lender Portal

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 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 # 071320220002, Lender: Steve Truitt, and Status: New (Active). Below this, there 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 two users: John Smith (Borrower) and Andy Agent (Settlement Agent). The 'Action Log' section shows a list of events, including 'eSign event created' and 'Invitation sent to struitt@docmagic.com'. At the bottom, there are buttons for 'Cancel Request' and 'Delete Request'.

#	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

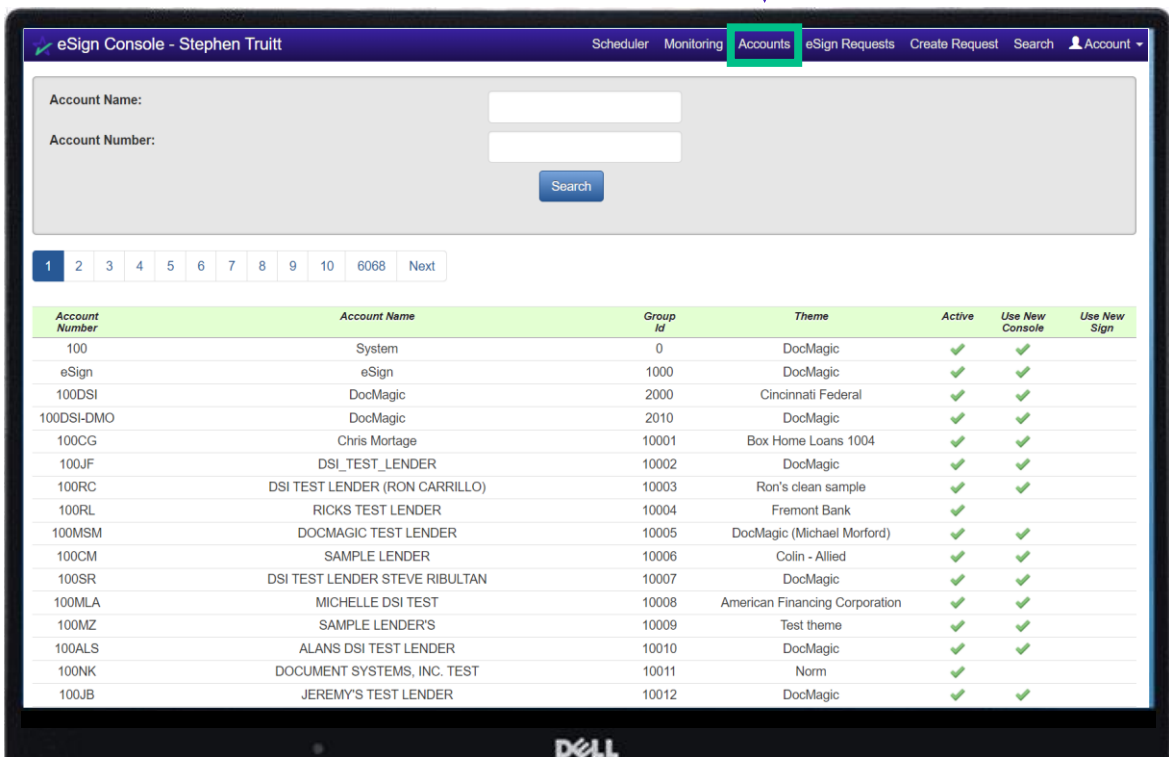
Turning Preview Mode Off allows the Settlement Agent to sign their documents before closing. *However, if they don't turn it back on, the borrower can also sign before closing.* The next few slides will go disabling this permission.



eSign Console/Lender Portal

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	✓	✓	

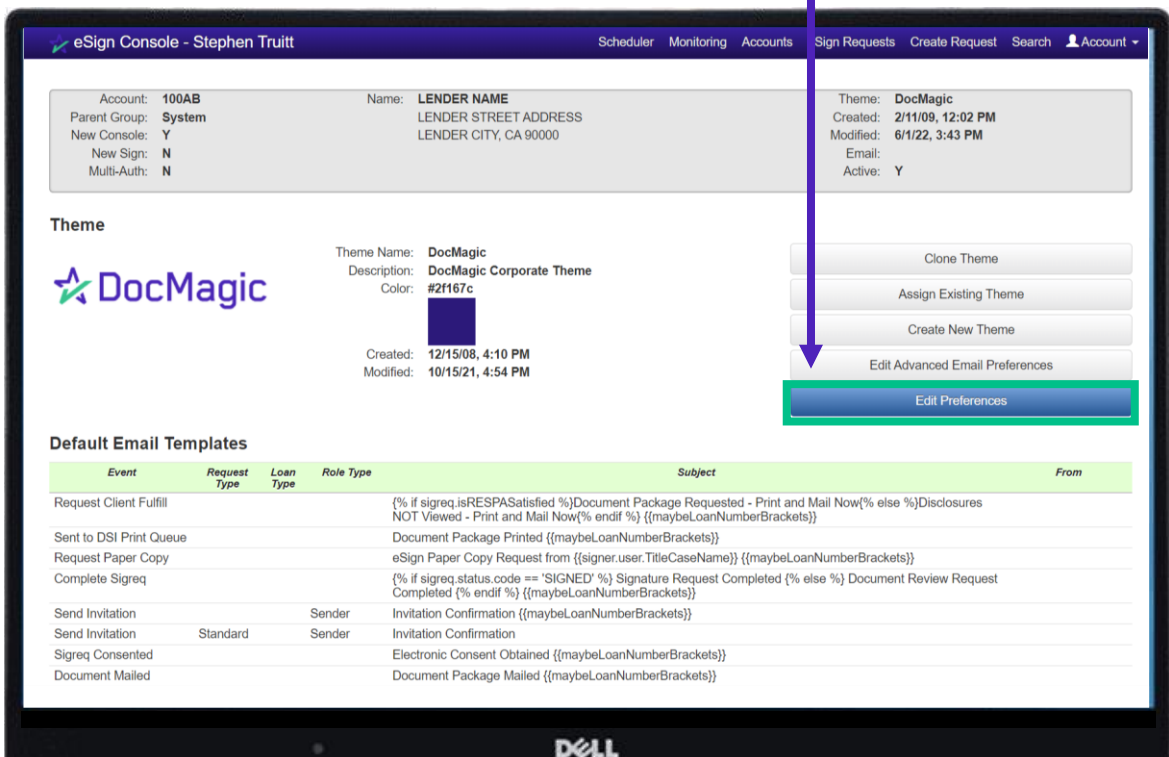
Click on an Account. The search function above allows you to filter by Account Name or Number.



eSign Console/Lender Portal

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**
Parent Group: **System** LENDER STREET ADDRESS
New Console: **Y** LENDER CITY, CA 90000
New Sign: **N**
Multi-Auth: **N**

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}}	

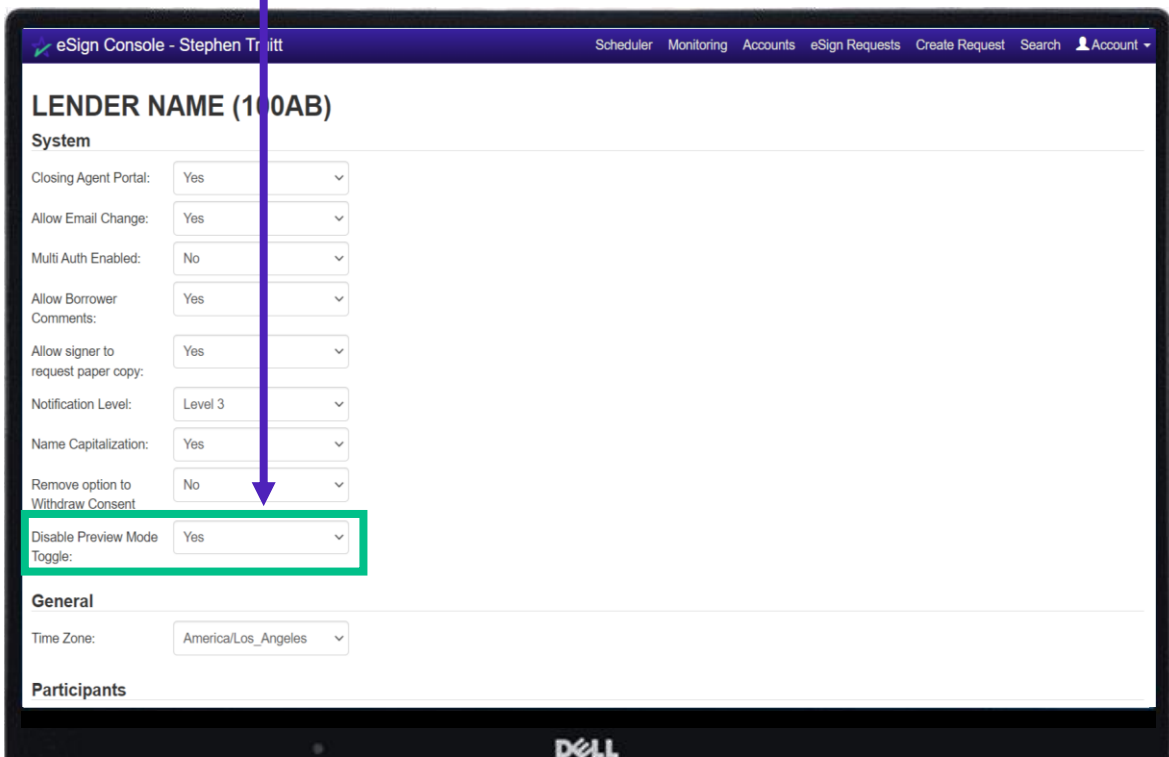
DELL



eSign Console/Lender Portal

Disable Preview Mode Toggle

Set "Disable Preview Mode Toggle" to Yes.



eSign Console - Stephen Truitt

Scheduler Monitoring Accounts eSign Requests Create Request Search Account

LENDER NAME (100AB)

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	▼

General

Time Zone:	America/Los_Angeles	▼
------------	---------------------	---

Participants

DELL

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	Signeq	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	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	✓	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 user 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, and Lender DSI TEST LENDER (SALES). A modal titled 'Upload a new document' is open, featuring a 'Document' input field, a 'Browse' button (highlighted with a green box), and 'Submit' and 'Cancel' buttons. Below the modal, a table lists 15 documents, each with a status indicator (checkmark or plus icon) and a 'Mark as Complete' button. The 'Documents' tab is selected, and a plus icon in the 'Documents' header is highlighted with a green box.

Document Name	Status	Count	Operation
1 Borrower's Certification, A	✓	2	Mark as Complete
2 Multistate Fixed Rate Note	✓	1	Mark as Complete
3 New Jersey Mortgage (MER)	✓	3	Mark as Complete
4 Uniform Residential Loan Appli	✓	2	Mark as Complete
5 Uniform Residential Loan Application - Lender Loan Information	✓	2	Mark as Complete
6 Addendum to Closing Instructions	✓	1	Mark as Complete
7 Specific Closing Instructions	✓	3	Mark as Complete
8 Hazard Insurance Authorization and Requirements	✓	2	Mark as Complete
9 IVES Request for Transcript of Tax Return	✓	2	Mark as Complete
10 Closing Disclosure	✓	5	Mark as Complete
11 Customer Identification Verification	✓	2	Mark as Complete
12 Initial Escrow Account Disclosure Statement	✓	2	Mark as Complete
13 New Jersey Initial Tax Authorization Notice	✓	1	Mark as Complete
14 New Jersey Private Well Testing Act Certification	✓	1	Mark as Complete
15 Signature Affidavit and AKA Statement	✓	0/2	Mark as Complete

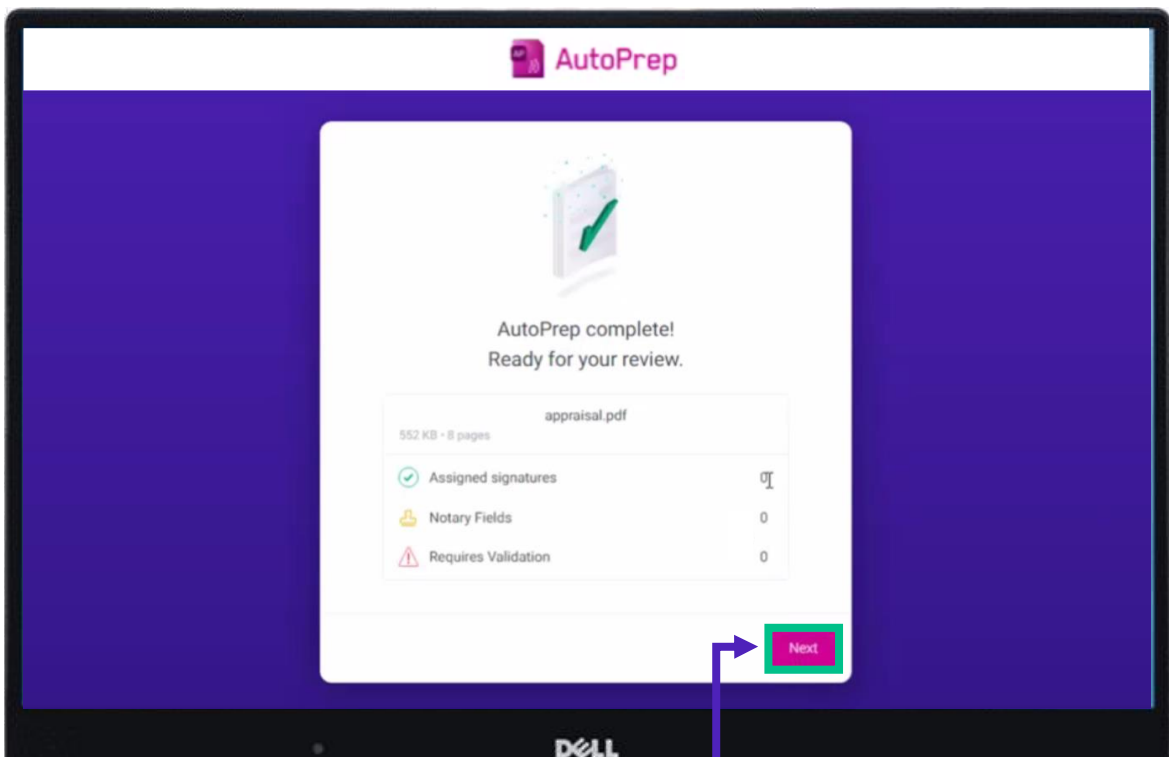
Click Browse. Select a document from your computer and then click the blue Submit button.



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

You'll be brought to the [Document Editor](#) to add or edit any additional fields that AutoPrep may have missed. Click Done in the top right to finalize your changes.

1Johnsandysmith_title docs.pdf
Prepare documents for signing.

[Space Below This Line For Acknowledgment]

A notary public or other officer completing this certificate verifies only the identity of the individual(s) who appear before him or her, and not the truthfulness, accuracy, or validity of that document.

State of CALIFORNIA)
County of LOS ANGELES)
On Notarization Date before me, _____
Date Here Insert Name and Title of the Notarizing Officer
personally appeared John Smith AND 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 the within instrument and acknowledged to me that he/she/they executed the same in his/her/their authorized capacity(ies) 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 true and correct.

WITNESS my hand and official seal.

Notary Seal

Commission Number

Signature
Signature of Notary Public

Assigned to
☒ Notary
☒ Required

Done



eSign Console/Lender Portal

Refresh

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

eSign Console - Steve Truitt

Scheduler Monitoring Accounts

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

Status: In Progress
Documents: 16 (7)
Signers: 3
Expires: N/A
Signatures: Y (In Progress)

Details Documents Documents Received EMail Versions

Documents

Document Name	ClickSign	Page(s)	Mark(s)	Signer(s)	Completed	Signeq Document Id Document
1 Borrower's Certification, Authorization and Consent	✓	2	1	1		5092137 5103638
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

Add Internal Note

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 'Documents' tab. A pencil icon is highlighted next to the first document, 'Borrower's Certification, Authorization and Consent'. A callout box points to this icon with the text: 'The pencil icon here allows you to edit a document.' The main area shows the document editor for 'Borrower's Certification, Authorization and Consent'. The document content includes a title, a description, and a signature line. The signature line has a dropdown menu with 'Borrower JOHN SMITH' selected. The document is currently in a 'Draft' state, indicated by a green checkmark and a pencil icon. The bottom of the screen shows a table of documents with columns for document name, status, and actions.

Document Name	Status	Actions
1 Borrower's Certification, Authorization and Consent	✓	1 1
2 Multistate Fixed Rate Note	✓	1 0 0
3 New Jersey Mortgage (MERS)	✓	1 1 1
4 Uniform Residential Loan Application	✓	0/2 1 1
5 Uniform Residential Loan Application	✓	1 1 1
6 Addendum to Closing Instructions	✓	1 1 1
7 Specific Closing Instructions	✓	1 1 1
8 Hazard Insurance Authorization and Consent	✓	1 1 1
9 IVES Request for Transcript of Tax	✓	1 1 1
10 Closing Disclosure	✓	1 1 1
11 Customer Identification Verification	✓	1 1 1
12 Initial Escrow Account Disclosure Statement	✓	1 1 1
13 New Jersey Initial Tax Authorization Notice	✓	1 1 1
14 New Jersey Private Well Testing Act Certification	✓	1 1 1
15 Signature Affidavit and AKA Statement	✓	1 1 1

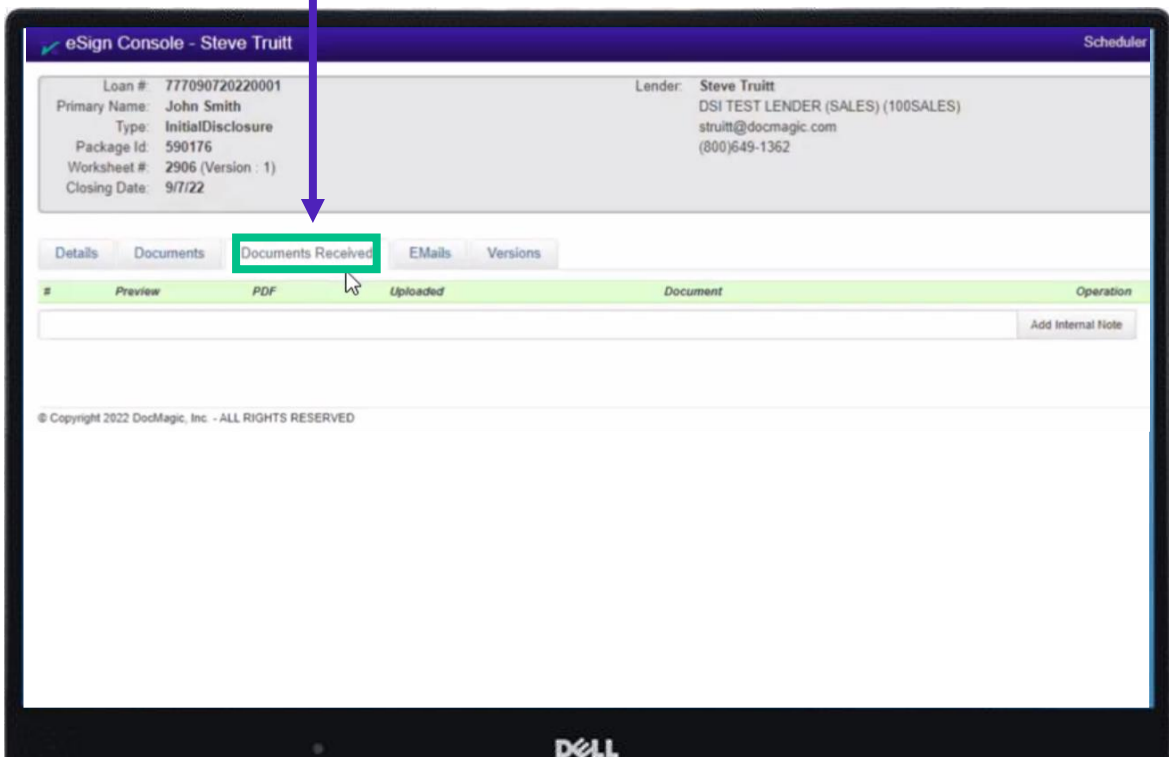
The Document Editor will open in another window. Click [here](#) for the guide.



eSign Console/Lender Portal

Documents Received

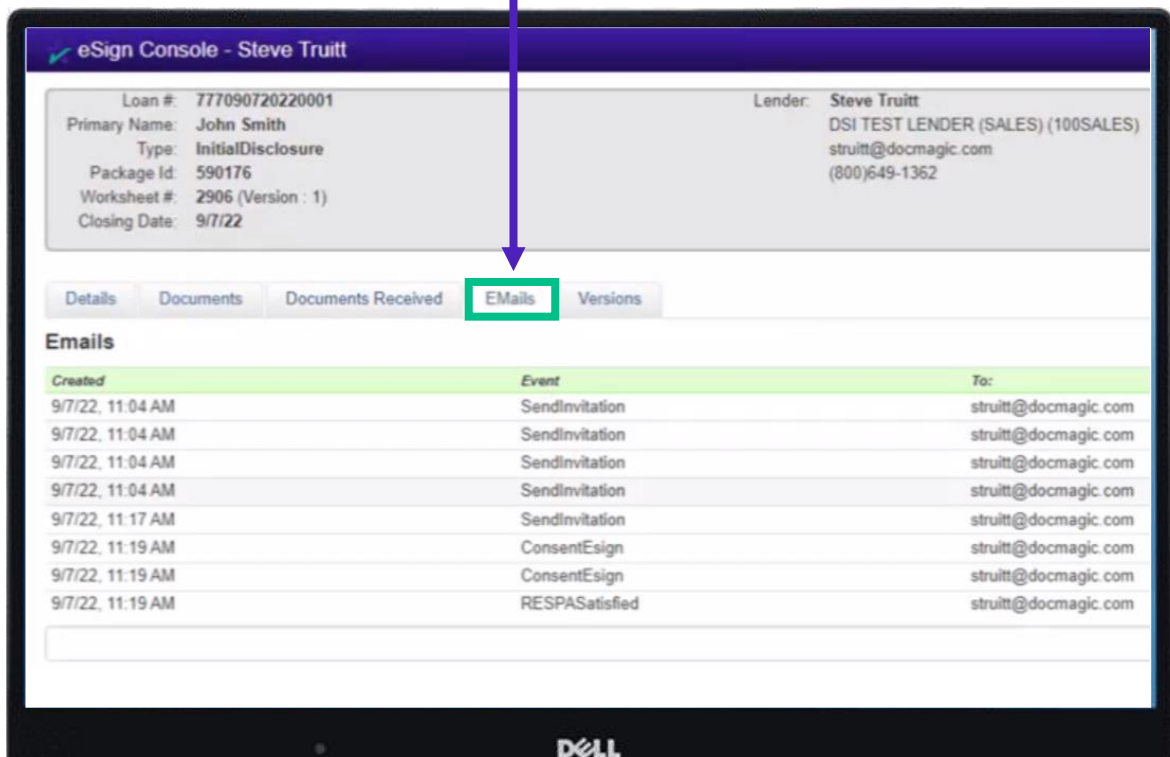
Documents Received is only for closing packages. If there are any notarized documents that the notary has uploaded back into the portal, they show up here.



eSign Console/Lender Portal

Emails

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



The screenshot shows the eSign Console interface for Steve Truitt. The top navigation bar is purple with the text "eSign Console - Steve Truitt". Below this, there are two main sections: "Loan #:" and "Lender:". The "Loan #" section contains the following information: Primary Name: John Smith, Type: InitialDisclosure, Package Id: 590176, Worksheet #: 2906 (Version : 1), and Closing Date: 9/7/22. The "Lender:" section contains the following information: Steve Truitt, DSI TEST LENDER (SALES) (100SALES), struitt@docmagic.com, and (800)649-1362. Below these sections are five tabs: Details, Documents, Documents Received, Emails, and Versions. The "Emails" tab is highlighted with a green border. Below the tabs, the "Emails" section is displayed, showing a table with three columns: Created, Event, and To:.

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

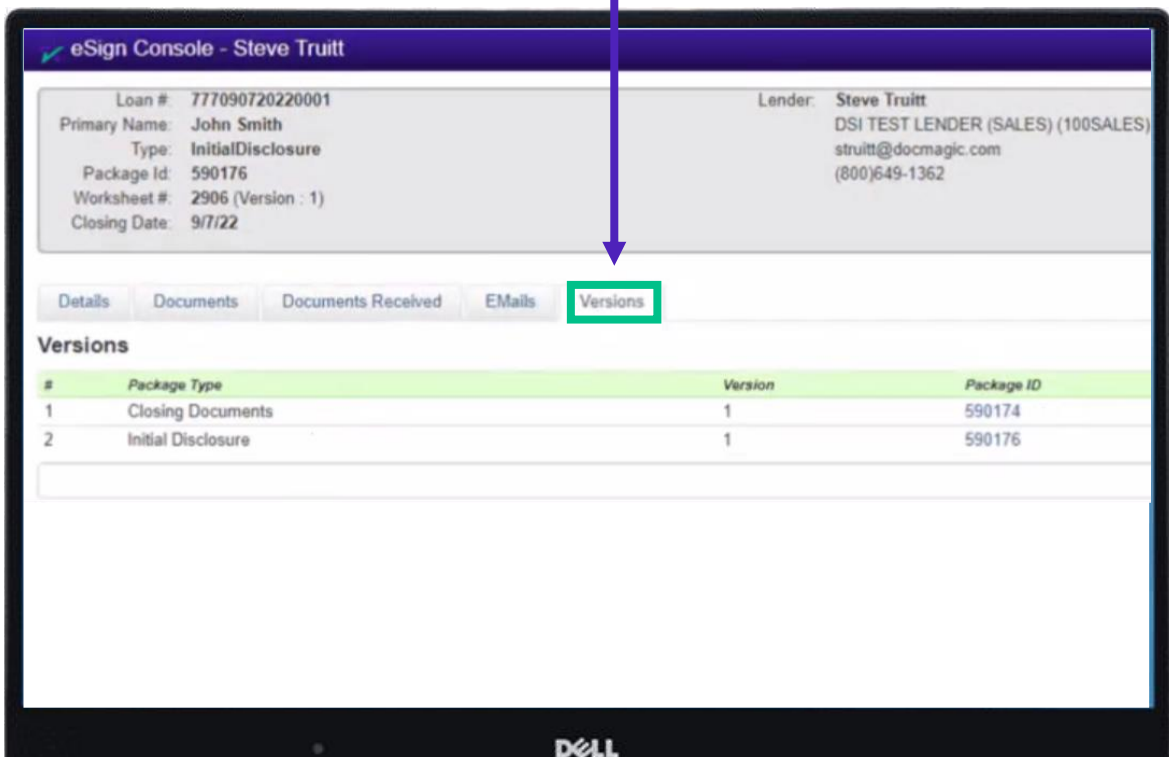
The Dell logo is visible at the bottom center of the screen.



eSign Console/Lender Portal

Versions

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



The screenshot displays the eSign Console interface for Steve Truitt. The top navigation bar is purple with the text "eSign Console - Steve Truitt". Below this, there are two main sections: Loan Information and Lender Information. The Loan Information section includes fields for Loan #, Primary Name, Type, Package Id, Worksheet #, and Closing Date. The Lender Information section includes fields for Lender, DSI TEST LENDER (SALES) (100SALES), email, and phone number. Below these sections is a tabbed interface with tabs for Details, Documents, Documents Received, Emails, and Versions. The Versions tab is selected and highlighted with a green box. Below the tabs is a table titled "Versions" with columns for #, Package Type, Version, and Package ID. The table contains two rows of data. A purple arrow points from the text box above to the Versions tab.

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



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 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), Documents: 15 (55 total pages), Signers: 3, Expires: N/A (Requires: Primary), Signatures: Y.
- Participants Table:** A table with columns for #, Name/Email, Role, Created, Started, Consented, Viewed, Completed, Declined, and Links. The 'Created' column is highlighted with a green box, and a blue arrow points from the text above to this column. The table shows three participants: John Smith (Borrower), Andy Agent (Settlement Agent), and a Notary placeholder.
- Action Log:** A table with columns for Date, User, IP Address, and Description. It shows three entries: 'eSign event created' by System User, and two 'Invitation sent to ron@docmagic.com' by John Smith and Andy Agent.

The bottom of the interface includes a copyright notice for DocMagic, Inc. and links for Home, Contact, Privacy Policy, and Terms of Use.

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.

The screenshot displays the DocMagic eSign Console interface. At the top, the DocMagic logo is on the left, and navigation buttons for Review, Sign, and Completed are in the center. On the right, the user is identified as JOHN SMITH, a Customer. Below the navigation bar, a message says "Please review your documents." and the document title is "Borrower's Certification, Authorization and Consent". A "Start signing" button is in the top right corner. The main content area shows the "BORROWER CONSENT TO THE USE OF TAX RETURN INFORMATION" section. It includes a paragraph stating the borrower's agreement to share tax return information for specific purposes: (i) providing an offer; (ii) originating, maintaining, managing, monitoring, servicing, selling, insuring, and securitizing a loan; or (iii) as otherwise permitted by applicable laws, including state and federal privacy and data security laws; or (iv) marketing. Below this, it defines "The Lender" and "The Other Loan Participants". At the bottom, there are signature and date lines for the borrower, JOHN SMITH. A sidebar on the right lists various documents, with "Borrower's Certification, Authorization and ..." selected. The Dell logo is visible at the bottom of the monitor frame.

DocMagic

Review Sign Completed

JS JOHN SMITH Customer

Please review your documents.

Initial Disclosure

Borrower's Certification, Authorization and Consent

BORROWER CONSENT TO THE USE OF TAX RETURN INFORMATION

I understand, acknowledge, and agree that the Lender and Other Loan Participants can obtain, use and share tax return information for purposes of:

- (i) providing an offer;
- (ii) originating, maintaining, managing, monitoring, servicing, selling, insuring, and securitizing a loan; or
- (iii) as otherwise permitted by applicable laws, including state and federal privacy and data security laws; or
- (iv) marketing

The Lender includes the Lender's affiliates, agents, service providers and any of aforementioned parties' successors and assigns.

The Other Loan Participants includes any actual or potential owners of a loan resulting from your loan application, or acquirers of any beneficial or other interest in the loan, any mortgage insurer, guarantor, any servicers or service providers for these parties and any of aforementioned parties' successors and assigns.

Signature

Borrower JOHN SMITH Date

Borrower Date

Borrower's Certification, Authorization and ...

Addendum to Loan Application

California Domestic Partnership Addendu...

Uniform Residential Loan Application

IVES Request for Transcript of Tax Return

Authorization for the Social Security Admi...

California Acknowledgment of Receipt of L...

California Copies of Signed Documents

California Fair Lending Notice

California Hazard Insurance Disclosure

Housing Counselors Near You

Important Information About Procedures f...

Iowa Subordination Agreement

Lender Record Change

Loan Estimate

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 links for Scheduler, Monitoring, Accounts, eSign Requests, Create Request, Search, and Account. The main header shows loan details: Loan # 777090720220001, Lender Steve Truitt, Status In Progress (Active), Documents 16 (72 total pages), Signers 3, Expires N/A (Requires: Primary), and Signatures Y (link Sign).

Below the header, there are tabs for Details, Documents, Documents Received, EMail, and Versions. The Participants table is visible, showing a row for John Smith (Borrower) with a green box highlighting the date and time stamps for Created, Started, Consented, Viewed, and Completed. The Action Log table is also visible, showing a list of events with columns for Date, User, IP Address, and Description.

#	Name/Email	Role	Created	Started	Consented	Viewed	Completed	Declined	Links
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
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

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 11:07 AM	Steve Truitt		Stephen Truitt (struitt21@gmail.com) added as Other
9/7/22 11:07 AM	Stephen Truitt		Invitation sent to struitt21@gmail.com
9/7/22 11:09 AM	John Smith		Consented to DocMagic eSign
9/7/22 11:09 AM	John Smith		Receipt of early disclosures within 3 business days met
9/7/22 11:09 AM	John Smith		eSign event started
9/7/22 11:09 AM	John Smith		Initial Disclosure version 1 prepared on September 07, 2022, 11:04 AM PDT displayed
9/7/22 11:12 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 11:01 AM	John Smith		Authorization for the Social Security Administration to Release SSN Verification signed by John Smith
9/7/22 11:01 AM	John Smith		Approved electronic representation of signature
9/7/22 11:01 AM	John Smith		Approved electronic representation of signature
9/7/22 11:01 AM	John Smith		Borrower's Certification, Authorization and Consent signed by JOHN SMITH
9/7/22 11:01 AM	John Smith		Uniform Residential Loan Application signed by JOHN SMITH
9/7/22 11:01 AM	John Smith		Virginia Disclosure of Terms of Mortgage Application signed by JOHN SMITH
9/7/22 11:01 AM	John Smith		IVES Request for Transcript of Tax Return signed by JOHN SMITH
9/7/22 11:01 AM	John Smith		Important Information About Procedures For Opening A New Account signed by JOHN SMITH

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

- Loan Details:** Loan # 777090720220001, Lender: Steve Truitt, Status: In Progress (Active), Documents: 16 (72 total pages), Signers: 3, Expires: N/A (Requires: Primary), Signatures: Y (link Sign).
- Participants Table:**

#	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	
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				

- Action Log Table:**

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

At the bottom right of the interface, there is a row of icons: a green arrow pointing right, a red document icon, a blue document icon, a printer icon, a green circular arrow icon, and a yellow padlock icon. A blue arrow points from the text box above to the padlock 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.

eSign Console - Steve Truitt

Scheduler Monitoring Accounts eSign Requests Create Request Search Account

Loan #: 777090720220001 Lender: Steve Truitt
Primary Name: John Smith DSI TEST LENDER (SALES) (100SALES)
Type: InitialDisclosure struitt@docmagic.com
Package Id: 590176
Worksheet #: 2906 (Version: 1) (800) 649-1362
Closing Date: 9/7/22 Status: In Progress (Active)
Documents: 16 (72 total pages)
Signers: 3
Expires: N/A (Requires: Primary
Signatures: Y (ink Sign)

Details Documents Documents Received EMail Versions

Participants

#	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				

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

Sign Documents


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: 500176	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@doomagic.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@doomagic.com		09/07/22 11:04:28 AM				
STEPHEN TRUITT strutt221@gmail.com		09/07/22 11:17:27 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@doomagic.com
09/07/22 11:04:28 AM	ANDY AGENT	10.1.138.24	Invitation sent to strutt@doomagic.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 links for 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), struitt@docmagic.com, (800) 649-1362. Status: In Progress (Active). Documents: 16 (72 total pages). Signers: 3. Expires: N/A (Requires: Primary). Signatures: Y (ink Sign).
- Participants:** A table listing participants with columns for Name/Email, Role, Created, Started, Consented, Viewed, and Completed. Participants include John Smith (Borrower), Andy Agent (Settlement Agent), and Stephen Truitt (Other).
- Action Log:** A table showing a chronological list of events, including invitation creation, document upload, and signature collection.

A red box highlights the PDF icon in the document management section, which is used to download the entire list of signed documents (including the certificate).

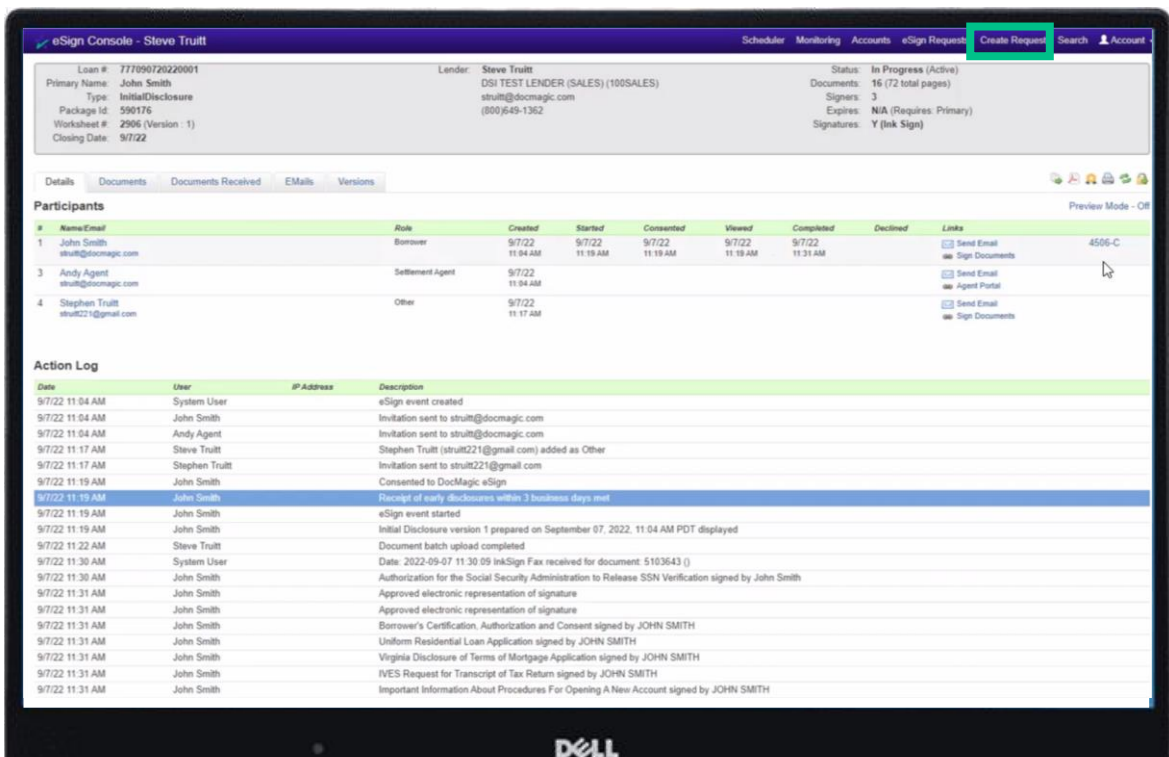
We recommend that you save the document sets after all signatures are collected, as you will only have a loan document set in the portal for 90 days.



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.



The screenshot displays the eSign Console interface for a loan. The top navigation bar includes links for Scheduler, Monitoring, Accounts, eSign Request, **Create Request** (highlighted), Search, and Account. The main content area shows loan details for Loan # 777090720220001, Lender Steve Truitt, and Status In Progress (Active). Below this, there are tabs for Details, Documents, Documents Received, EMail, and Versions. The Participants table lists four individuals: John Smith (Borrower), Andy Agent (Settlement Agent), and Stephen Truitt (Other). The Action Log table provides a detailed history of events, including document uploads, signatures, and disclosures.

#	Name/Email	Role	Created	Started	Consented	Viewed	Completed	Declined	Links
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
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

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
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9/7/22 11:19 AM	John Smith		Consented to DocMagic eSign
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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
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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
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Click on the Bonus Material section on the [Lender's Product Training Page](#) for details.

