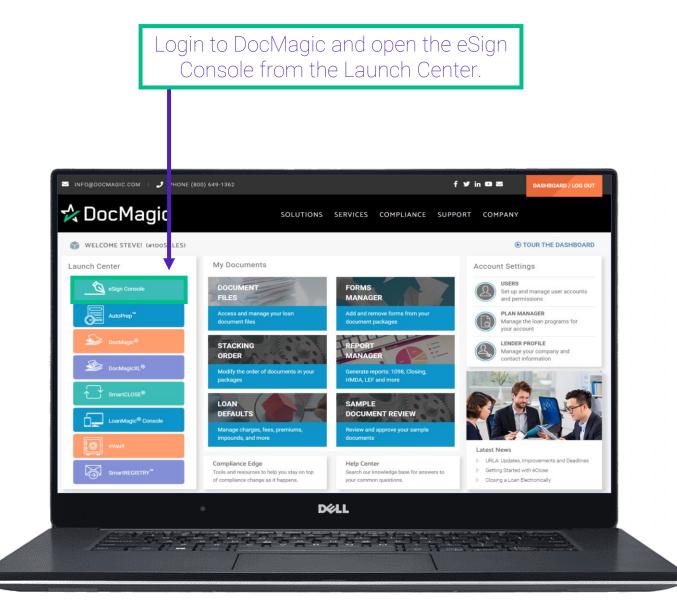


Getting Started





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.

* e	eSign Console - Alan Dai			e	Sign Requests	Cre	ate Re	quest S	Sear h	Account -
Acti	ve Requests Showing 1 - 17 of 17									
1	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	«	~	0	×	
-	777070320240001 Closing Documents	Stephen Truitt (+1) aland@docmagic.com	Consented 1356	2	7/22/24 11:12 AM	~	~	0	A	
ૺ૽	777071620240001 Closing Documents	Stephen Truitt (+3) struitt@docmagic.com	In Progress 1370	1	7/16/24 9:50 AM	~		0	A	
Ø	777071120240001 Integrated Disclosure Documents	Stephen Truitt (+2) struitt@docmagic.com	Printed 1365	1	7/11/24 11:46 AM	~			Å	
0	777071020240001 Closing Documents	Stephen Truitt (+2) struitt@docmagic.com	Signed 1364	1	7/10/24 8:29 AM	~		0	A	
0	777070920240001 Closing Documents	Stephen Truitt (+4) struitt@docmagic.com	Signed 1363	1	7/9/24 9:44 AM	~		0	A	
0	777070320240001 Integrated Disclosure Documents	Stephen Truitt (+1) aland@docmagic.com	Signed 1360	1	7/3/24 11:45 AM	~		æ	A	
*	777070120240001 Closing Documents	Stephen Truitt (+3) aland@docmagic.com	New 1355	1	7/1/24 10:44 AM	~		٢	A	
÷	777062720240002 Closing Documents	Stephen Truitt (+4) struitt@docmagic.com	In Progress 1333	2	6/27/24 9:48 AM	~		٢	A	
-	777062620240001 Closing Documents	Stephen Truitt (+4) aland@docmagic.com	Consented 1348	2	6/26/24 2:20 PM	~		0	A	
0	181025730 Initial Disclosure	Sammy J Sample (+2) ron@docmagic.com	Signed 1353	1	6/26/24 12:32 PM	~			A	
*	77706261425 Closing Documents	John Smith (+1) leah@docmagic.com	New 1352	1	6/26/24 12:27 PM	~	«	0	<u>R</u>	

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



Help Button

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

🖌 e	Sign Console - Steve T	Truitt	Scheduler	Monitoring	Accounts	eSign Requests	Create	e Request	Search	👤 Account 👻
Acti	ve Requests Showing 1 -	50 of 78						- 1	Dashboard	
1	2 Next Show: 50	~						- 1	Mv Account	
	Loan # Document Set	<u>Signer</u> Email		Status Worksheet #	<u>Ver</u>	Created	CS /	s res	Preferences	
	77709291543 Closing Documents	John Smith (+3) Ifortunato@docmagic.com		In Progress	1	9/29/22 1:50 PM	~	0	Contact Us	
*	77709291532 Closing Documents	John Smith (+3) leah@docmagic.com		New	1	9/29/22 1:41 PM	~	4	Help	┥│
-	77709291451 Closing Documents	John Smith (+3) struitt@docmagic.com		In Progress	1	9/29/22 12:52 PM	~	6		
*	77709291447 Closing Documents	John Smith (+3) struitt@docmagic.com		New	1	9/29/22 12:48 PM	~	0	Sign Out	
*	77709291352 Closing Documents	John Smith (+3) struitt@docmagic.com		New	1	9/29/22 11:59 AM	~	0	P	
*	77709291331 Closing Documents	John Smith (+3) struitt@docmagic.com		New	1	9/29/22 11:39 AM	~	0	P	
*	77709291311 Closing Documents	John Smith (+3) struitt@docmagic.com		New	1	9/29/22 11:23 AM	~	0	R	
÷	77709291307 Closing Documents	John Smith (+3) struitt@docmagic.com		In Progress	1	9/29/22 11:08 AM	~	0	R	
	77709291256 Closing Documents	John Smith (+3) struitt@docmagic.com		In Progress	1	9/29/22 10:58 AM	~	0	<u>بر</u>	
	77709290932 Closing Documents	John Smith (+2) ron@docmagic.com		In Progress 2975	1	9/29/22 10:25 AM	~	0	<u>بر</u>	
4	77709291143 Closing Documents	John Smith (+5) roland@docmagic.com		In Progress 2977	1	9/29/22 9:46 AM	~	0	P	
6	777092920220004 Closing Documents	John Smith (+2) aland@docmagic.com		Signed 2978	1	9/29/22 9:45 AM	~	0	A	
		•		DELL						



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			e	Sign Requests	Cre	ate Re	quest	Search	Account -
Α	tive Requests Showing 1 - 17 of 17									
	Show: 50 V									2
	Loan # Document Set	Signer Email	Status Worksheet #	<u>Ver</u>	Created	cs	IS	RESPA	PDF	Archive
*	777072320240001 Closing Documents	Stephen Truitt (+1) aland@docmagic.com	New 1380	1	7/23/24 4:13 PM	~	~	٢	×.	
-	777070320240001 Closing Documents	Stephen Truitt (+1) aland@docmagic.com	Consented 1356	2	7/22/24 11:12 AM	~	~	٢	P	
1	777071620240001 Closing Documents	Stephen Truitt (+3) struitt@docmagic.com	In Progress 1370	1	7/16/24 9:50 AM	~		٢	P	
6	777071120240001 Integrated Disclosure Documents	Stephen Truitt (+2) struitt@docmagic.com	Printed 1365	1	7/11/24 11:46 AM	~			P	
	777071020240001 Closing Documents	Stephen Truitt (+2) struitt@docmagic.com	Signed 1364	1	7/10/24 8:29 AM	~		٢	R	2
R	777070920240001 Closing Documents	Stephen Truitt (+4) struitt@docmagic.com	Signed 1363	1	7/9/24 9:44 AM	~		٢	R	2
	777070320240001 Integrated Disclosure Documents	Stephen Truitt (+1) aland@docmagic.com	Signed 1360	1	7/3/24 11:45 AM	~			A	
1	777070120240001 Closing Documents	Stephen Truitt (+3) aland@docmagic.com	New 1355	1	7/1/24 10:44 AM	~		٢	A	
8	777062720240002 Closing Documents	Stephen Truitt (+4) struitt@docmagic.com	In Progress 1333	2	6/27/24 9:48 AM	~		٢	R	
5	777062620240001 Closing Documents	Stephen Truitt (+4) aland@docmagic.com	Consented 1348	2	6/26/24 2:20 PM	~		٢	A	
	181025730 Initial Disclosure	Sammy J Sample (+2) ron@docmagic.com	Signed 1353	1	6/26/24 12:32 PM	~			R	2
1	77706261425 Closing Documents	John Smith (+1) leah@docmagic.com	New 1352	1	6/26/24 12:27 PM	~	~	٢	A	

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



Status Icons

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

		Contraction of the local division of the loc								
*	:Sign Console - Alan Dai			e	Sign Requests	Сге	eate Re	equest	Search	👤 Account 🗸
Act	ve Requests Showing 1 - 17 of 17									
1	Show: 50 V									2
	Loan.# Document Set	Signer Email	Status Worksheet #	<u>Ver</u>	Created	CS	IS	RESPA	PDF	Archive
*	777072320240001 Closing Documents	Stephen Truitt (+1) aland@docmagic.com	New 1380	1	7/23/24 4:13 PM	~	~	٢	P	
-	777070320240001 Closing Documents	Stephen Truitt (+1) aland@docmagic.com	Consented 1356	2	7/22/24 11:12 AM	~	~	٢	P	
÷\$	777071620240001 Closing Documents	Stephen Truitt (+3) struitt@docmagic.com	In Progress 1370	1	7/16/24 9:50 AM	~		0	J.	
	777071120240001 Integrated Disclosure Documents	Stephen Truitt (+2) struitt@docmagic.com	Printed 1365	1	7/11/24 11:46 AM	~			A	
٦	777071020240001 Closing Documents	Stephen Truitt (+2) struitt@docmagic.com	Signed 1364	1	7/10/24 8:29 AM	~		٢	R	
	777070920240001 Closing Documents	Stephen Truitt (+4) struitt@docmagic.com	Signed 1363	1	7/9/24 9:44 AM	~		٢	بر ا	
8	777070320240001 Integrated Disclosure Documents	Stephen Truitt (+1) aland@docmagic.com	Signed 1360	1	7/3/24 11:45 AM	~		æ	J.	
T	777070120240001 Closing Documents	Stephen Truitt (+3) aland@docmagic.com	New 1355	1	7/1/24 10:44 AM	~		0	J.	
4	777062720240002 Closing Documents	Stephen Truitt (+4) struitt@docmagic.com	In Progress 1333	2	6/27/24 9:48 AM	«		٢	A	
4	777062620240001 Closing Documents	Stephen Truitt (+4) aland@docmagic.com	Consented 1348	2	6/26/24 2:20 PM	~		٢	J.	
8	181025730 Initial Disclosure	Sammy J Sample (+2) ron@docmagic.com	Signed 1353	1	6/26/24 12:32 PM	~		æ	A	
Ŧ	77706261425 Closing Documents	John Smith (+1) leah@docmagic.com	New 1352	1	6/26/24 12:27 PM	~	~	٢	Å	
	3		8411							

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



Opening a Document Set

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

🖌 e	Sign Conso 🧿 - Stev	e Truitt	Scheduler	Monitoring	Accounts	eSign Requests	Crea	te Request	Search	Account -
	Loan # Document Set	Signer Email		Status Worksheet #	Ver	Created	cs	IS RESPA	PDF	Archive
*	777100320220001	John Smith (+3) aland@docmagic.com		New 2991	1	10/3/22 2:04 PM	~	0	P	
*	77710031350 Closing Documents	John Smith (+2) ron@docmagic.com		New 2990	1	10/3/22 1:54 PM	1	0	P	
*	77710031349 Closing Documents	John Smith (+2) ron@docmagic.com		New 2989	1	10/3/22 1:52 PM	~	0	R	
*	77710031348 Closing Documents	John Smith (+2) ron@docmagic.com		New 2988	1	10/3/22 1:49 PM	~	0	P	
-	77709291543 Closing Documents	John Smith (+3) Ifortunato@docmagic.com		In Progress	1	9/29/22 1:50 PM	~	0	A	
*	77709291532 Closing Documents	John Smith (+3) leah@docmagic.com		New	1	9/29/22 1:41 PM	~	0	A	
-(j)+	77709291451 Closing Documents	John Smith (+3) struitt@docmagic.com		In Progress	1	9/29/22 12:52 PM	1	0	P	
*	77709291447 Closing Documents	John Smith (+3) struitt@docmagic.com		New	1	9/29/22 12:48 PM	~	0	R	
*	77709291352 Closing Documents	John Smith (+3) struitt@docmagic.com		New	1	9/29/22 11:59 AM	~	0	A	
*	77709291331 Closing Documents	John Smith (+3) struitt@docmagic.com		New	1	9/29/22 11:39 AM	~	0	A	
*	77709291311 Closing Documents	John Smith (+3) struitt@docmagic.com		New	1	9/29/22 11:23 AM	1	0	R	
-	77709291307 Closing Documents	John Smith (+3) struitt@docmagic.com		In Progress	1	9/29/22 11:08 AM	~	0	A	
()	77709291256 Closing Documents	John Smith (+3) struitt@docmagic.com		In Progress	1	9/29/22 10:58 AM	~	0	P	
())•	77709290932 Closing Documents	John Smith (+2) ron@docmagic.com		In Progress 2975	1	9/29/22 10:25 AM	1	٢	P	
				DELL						



Key Info

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

	ign console	e - Steve Truitt					Schedule	r Monitoring	Accounts	eSign Requests	Create	Request	Search	Account
													Re	turn to Searc
P: Wo	Type: EC ackage Id: 60	ohn Smith Closing 04282 090 (Version : 1)			Lender:		ENDER (SAL gic.com	ES) (100SALE:	5)	Documents: Signers:	N/A (Requ		ry)	
Detai	ils Docume	ents Documents	s Received	EMails	Versions							R.	E	
artic	ipants 🛃												Previ	ew Mode - O
# Nar	me/Email			Role		Created	Started	Consented	Viewed	Completed	Declined	Links		
	nn Smith @docmagic.com			Borrowe	ar	10/3/22 1:54 PM						🔛 Send I 📾 Sign D		Is
	dy Agent @docmagic.com			Settlem	ent Agent	10/3/22 1:54 PM						Send I Rep Agent		
Action Date	n Log		User		IP A	ddress	Des	scription						
Date	n Log 2 1:54 PM		User System User		IP A	ddress		scription ign event create	ed					
Date 10/3/22					IP A	ddress	eSi			gic.com				
Date 10/3/22 10/3/22	2 1:54 PM		System User		IP A	ddress	eSi Inv	ign event create	on@docma	·				
Date 10/3/22 10/3/22	2 1:54 PM 2 1:54 PM		System User John Smith		IP A	ddress	eSi Inv	ign event create itation sent to re	on@docma on@docma	·				
Date 10/3/22 10/3/22	2 1:54 PM 2 1:54 PM		System User John Smith		IP A	ddress	eSi Inv	ign event create itation sent to re itation sent to re	on@docma on@docma	·		Cancel Reque	əst D	elete Request
Date 10/3/22 10/3/22 10/3/22	2 1:54 PM 2 1:54 PM 2 1:54 PM		System User John Smith Andy Agent		IP A	ddress	eSi Inv	ign event create itation sent to re itation sent to re	on@docma on@docma	·				elete Request
Date 10/3/22 10/3/22 10/3/22	2 1:54 PM 2 1:54 PM 2 1:54 PM		System User John Smith Andy Agent		IP A	ddress	eSi Inv	ign event create itation sent to re itation sent to re	on@docma on@docma	·				



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.

						s eSign Request			turn to Searc
Loan #: 77710031350 Primary Name: John Smith Type: EClosing Package Id: 60/232 Worksheet #: 2990 (Version : 1)	Lender:		ENDER (SAL gic.com	ES) (100SALE	5)	Documents: Signers:	N/A (Requires		
Details Documents Documents Received	EMails Versions								
Name/Email	Role	Created	Started	Consented	Viewed	Completed	Declined	Previ Links	ew Mode - O
John Smith ron@docmagic.com	Borrower	10/3/22 1.54 PM	Started	Constituted	newed	Completed	l	Send Email	s
Andy Agent ron@docmagic.com	Settlement Agent	10/3/22 1:54 PM						Send Email Agent Portal	
ction Log									
late User		ddress		cription					
0/3/22 1:54 PM System Use				gn event create					
0/3/22 1:54 PM John Smith 0/3/22 1:54 PM Andy Agent				tation sent to re tation sent to re		-			
of the first				Add Interna					
							Can	cel Request D	elete Request



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.

colgin console	- Steve Truitt				Schedule	er Monitoring	Accounts	eSign Request	s Create	Request	Search	Account
											Ret	urn to Search
Loan #: 777 Primary Name: Joh Type: ECk Package Id: 604: Worksheet #: 2996 Closing Date: 9/30	n Smith osing 282 0 (Version : 1)		Lender:		ENDER (SAL igic.com	ES) (100SALE	S)	Status: Documents: Signers: Expires: Signatures:	3 N/A (Requ	l pages)	ary)	
Details Documer	nts Docume ts	s Received E	EMail Versions							(B B S	838
articipants 🛃]←		<u> </u>								Previe	ew Mode - Off
Name/Email			Role	Created	Started	Consented	Viewed	Completed	Declined	Links		
John Smith ron@docmagic.com			Borrower	10/3/22 1:54 PM						Seno Sign	d Email Documents	
Andy Agent ron@docmagic.com			Settlement Agent	10/3/22 1:54 PM						Seno Agen		
ction Log	-											
ate	-	User Sustem Licer	IP A	lddress		scription	ad					
ate D/3/22 1:54 PM	1	System User	IP A	lddress	eSi	ign event creat		nic com				
ate 0/3/22 1:54 PM 0/3/22 1:54 PM		System User John Smith	IP A	ddress	eSi Inv	ign event creat itation sent to r	ron@docma					
ate D/3/22 1:54 PM D/3/22 1:54 PM		System User	IP A	ddress	eSi Inv	ign event creat	ron@docma ron@docma					
ate D/3/22 1:54 PM D/3/22 1:54 PM		System User John Smith	IP A	lddress	eSi Inv	ign event creat itation sent to r itation sent to r	ron@docma ron@docma			Cancel Requ	uest De	elete Request
ction Log are 0/3/22 1:54 PM 0/3/22 1:54 PM 0/3/22 1:54 PM		System User John Smith Andy Agent	IP A	lddress	eSi Inv	ign event creat itation sent to r itation sent to r	ron@docma ron@docma					Idete Request
1/3/22 1:54 PM 0/3/22 1:54 PM 0/3/22 1:54 PM 0/3/22 1:54 PM		System User John Smith Andy Agent	IP A		eSi Inv Inv	ign event creat itation sent to r itation sent to r	ron@docma ron@docma					
ate 2)/3/22 1:54 PM 2)/3/22 1:54 PM 2)/3/22 1:54 PM		System User John Smith Andy Agent			eSi Inv	ign event creat itation sent to r itation sent to r	ron@docma ron@docma					

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



Links

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

🏏 eSign Con	sole - Steve Truitt			Scheduler	Monitoring	Accounts	eSign Reque	sts Create	Request	Search	Account
										Ret	urn to Search
Primary Name:	EClosing 604282 2990 (Version : 1)	Lender:		ENDER (SALE gic.com	ES) (100SALE	S)	Status: Documents: Signers: Expires: Signatures:	15 (55 tota 3 N/A (Requ	al pages)	y)	
Details Do	cuments Documents Received	EMails Versions									858
Participants	2+								_	Previe	w 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					_	Seni	d Email Documents	
3 Andy Agent ron@docmagic.	com	Settlement Agent	10/3/22 1:54 PM						🖾 Sen 📾 Age		
Action Log											
Date	User	IP A	ddress	Des	cription						
10/3/22 1:54 PM	System User				gn event create						
10/3/22 1:54 PM	John Smith				tation sent to r		-				
10/3/22 1:54 PM	Andy Agent			Invi	tation sent to r	on@docma	gic.com				
					Add Interna	I Note					
									Cancel Req	uest De	lete Request
© Copyright 2022 Doe	Magic, Inc ALL RIGHTS RESERVED							Home	Contact P	rivacy Policy	Terms of Use
			D	KELL.							

Sign Documents allows you to open that Participant's signing experience – this assumes that the participant is with you. Selecting Sign Documents opens the customer signing experience in another tab.



Links

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

Primary Name: John Sm Type: EClosin Package Id: 604282 Worksheet #: 2990 (Ve Closing Date: 9/30/22	g	Lender:		ENDER (SA gic.com	.ES) (100SALE	S)	Status: Documents: Signers: Expires: Signatures:	New (Acti 15 (55 tot 3 N/A (Req Y			
Details Documents	Documents Received	EMails	Versions							G	
Participants 🛃										1	Preview Mode - O
# Name/Email		Role		Created	Started	Consented	Viewed	Completed	Declined	Links	
1 John Smith ron@docmagic.com		Borrowe	er.	10/3/22 1:54 PM						Send Emi Sign Doci	
3 Andy Agent ron@docmagic.com		Settlem	ent Agent	10/3/22 1:54 PM						C Sond Em	
	User		IP A	ddress	De	scription					
Action Log						ign event creat	ed				
	System User				In	vitation sent to r	on@docma	agic.com			
Date	System User John Smith							200.00000000			
Date 10/3/22 1:54 PM						vitation sent to r	on@docma	agic.com			
Date 10/3/22 1:54 PM 10/3/22 1:54 PM	John Smith					vitation sent to r Add Interna		agic.com			
Date 10/3/22 1:54 PM 10/3/22 1:54 PM	John Smith							agic.com		Cancel Request	Delete Request

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



Adding Participants

	Clic	ck her	e to	add	partic	cipa	nts.				
🖌 eSign Consc e - Steve Tru	iπ			Sched	uler Monitoring	Accounts	eSign Reques	ts Create	Request S		
Loan #: 7710031350 Primary Name: ohn Smith Type: Closing		Lende			ALES) (100SALES	3)	Status: Documents:	New (Activ 15 (55 tota 3		Ret	urn to Search
Package Id: 04282	Add Partic	ipant				Х	Signers: Expires:	N/A (Requ	ires: Primar	y)	
Worksheet #: 990 (Version Closing Date: /30/22	Please pro	ovide the info	rmation	for the nev	v participant.		Signatures:	T			
Details Documents De	First Name:	Notary_	name_	placeho	older				6	E A	858
Participants 🛃	Last Name:									Previe	w Mode - Off
Name/Email John Smith							Completed	Declined	Links	imail	
ron@docmagic.com	Email:								Sign D		
Andy Agent ron@docmagic.com	Access Code:								Send E Agent I		
	Role:	Settlement A	gent		~						
Action Log											
Date				Add	Cancel		_				
0/3/22 1:54 PM	System User				eSign event create	d					
0/3/22 1:54 PM	John Smith				Invitation sent to re						
10/3/22 1:54 PM	Andy Agent				Invitation sent to re	on@docmag	ic.com				
					Add Internal	Note					
								0	Cancel Reque	st De	lete Request
Copyright 2022 DocMagic, Inc ALL RIGH	IS RESERVED							Home	Contact Prive	acy Policy	Terms of Use
S. 6				DELL							
				DVLL							

Populate the fields in the window that appears. Make sure to give them an Access Code and choose the correct role from the dropdown. Select Add when done.



Adding Participants

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

Pack Work:		04282 990 (Ven	th			Lender:		ENDER (SAL igic.com	ES) (100SALE:	5)	Documents: Signers:	N/A (Requ		y)	
Details	Docun	nents	Documents	Received	EMails	Versions							9	E	A 🖶 🌣 🖥
articip	oants 🔒	+												Pr	view Mode - O
Name					Role		Created	Started	Consented	Viewed	Completed	Declined	Links		
	Smith docmagic.com				Borrow	ər	10/3/22 1:54 PM						Send I Sign D		nts
Andy	Agent				Settlem	ent Agent	10/3/22						Send I	2000	
ron@d	docmagic.com						1:54 PM						co Agent		· · · · · ·
	ry_name_pla RY_EMAIL_PI				Notary		10/3/22 1:54 PM						Send I		nts
ate			L	User		IP A	ddress	Des	cription						
0/3/22 1	1:54 PM		S	System User				eSi	gn event create	ed					
0/3/22 1	1:54 PM		J	John Smith				Inv	itation sent to re	on@docma	agic.com				
0/3/22 1	1:54 PM		F	Andy Agent				Inv	itation sent to re	on@docma	agic.com				
									Add Interna	I Note					
													Cancel Reque	est	Delete Request



Disable Preview Mode Toggle

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

		1002 - 53					Sec. 2	-						
Ż	eSign Con	sole - Ste	eve Truitt				Schedu	ler Monitorin	g Accour	nts eSign Requ	uests Cre	ate Request	Search	🖁 Account 👻
	Primary Name:	EClosing 562064 2732 (Ver	ith	L	ender:	Steve Truitt DSI TEST L struitt@docr (800)649-13	ENDER (SA magic.com	ILES) (100SAL	ES)		ts: 15 (57 rs: 2	total pages) tequires: Prim	iary)	
Γ	Details Do	cuments	Documents Received	EMails Ve	rsions								D 🗩 🕯	🚔 🕫 🔒
Pa	articipants	2+											Previe	w Mode - On
#	Name/Email			Role		Created	Started	Consented	Viewed	Completed	Declined	Links		
1	John Smith struitt@docmagi	c.com		Borrower		7/13/22 10:47 AM						🖂 Send E 📾 Previev	mail v Documents	
3	Andy Agent struitt@docmagi	c.com		Settlement Aç	gent	7/13/22 10:48 AM						💟 Send E 🚥 Agent F		
A	ction Log													
De	ate		User		IP Ad	idress	Des	scription						
7/	13/22 10:48 AM		System Use	r			eS	ign event creat	ed					
	13/22 10:48 AM		John Smith					itation sent to a	~	•				
7/	13/22 10:48 AM		Andy Agent				Inv	itation sent to	struitt@doc	magic.com				
								Add Inter	nal Note					
												Cancel Rec	juest De	lete Request
00	Copyright 2022 Doc	Magic, Inc A	LL RIGHTS RESERVED								Но	ome Contact F	rivacy Policy	Terms of Use
						D	KELL							

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 C

Account Nan Account Nun

1 2 3

Disable Preview Mode Toggle

								 ~	<u> </u>	nd it				pp.		
															_	
													Ļ			
or	nsol	e - S	Step	hen '	Truit	ener t				Scheduler	Monitori	ng A	Accounts	eSign Requests	Create Request	Search
	ie:				_											
ım																
ım	ie:								Searc	h						

Start by going to Accounts. You

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	 Image: A second s	 Image: A second s	
100DSI-DMO	DocMagic	2010	DocMagic	 Image: A second s	v	
100CG	Chris Mortage	10001	Box Home Loans 1004	 Image: A second s	 Image: A set of the set of the	
100JF	DSI_TEST_LENDER	10002	DocMagic	×	 Image: A second s	
100RC	DSI TEST LENDER (RON CARRILLO)	10003	Ron's clean sample	 Image: A second s	 Image: A second s	
100RL	RICKS TEST LENDER	10004	Fremont Bank	 Image: A second s		
100MSM	DOCMAGIC TEST LENDER	10005	DocMagic (Michael Morford)	 Image: A second s	 Image: A second s	
100CM	SAMPLE LENDER	10006	Colin - Allied	×	 Image: A second s	
100SR	DSI TEST LENDER STEVE RIBULTAN	10007	DocMagic	 Image: A second s	 Image: A second s	
100MLA	MICHELLE DSI TEST	10008	American Financing Corporation	 Image: A second s	 Image: A set of the set of the	
100MZ	SAMPLE LENDER'S	10009	Test theme	 Image: A second s	 Image: A second s	
100ALS	ALANS DSI TEST LENDER	10010	DocMagic	~	~	
100NK	DOCUMENT SYSTEMS, INC. TEST	10011	Norm	 Image: A second s		
100JB	JEREMY'S TEST LENDER	10012	DocMagic	~	×	

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



Account

Disable Preview Mode Toggle

			26	lect Edit Pi		ues.			
eSign Console	- Stephen	Truitt		8	scheduler Monitoring	Accounts	Sign Reques	ts Create Request	Search LAcco
Account: 100 Parent Group: Sys New Console: Y New Sign: N Multi-Auth: N)AB stem			LENDER NAME LENDER STREET ADDRESS LENDER CITY, CA 90000			Theme: Created: Modified: Email: Active:	DocMagic 2/11/09, 12:02 PM 6/1/22, 3:43 PM Y	
^{™eme}	1agic		Theme Name: Description: Color: Created: Modified:	DocMagic DocMagic Corporate Theme #2/167c 12/15/08, 4:10 PM 10/15/21, 4:54 PM			Edi	Clone Theme Assign Existing Th Create New The t Advanced Email Pro- Edit Preference	me eferences
	mplates								From
Default Email Te Event	Request	Loan	Role Type		Subject				
Event	Request Type	Loan Type	{% if	sigreq.isRESPASatisfied %}Docur	nent Package Requeste			se %}Disclosures	
Event Request Client Fulfill	Type		{% if NOT	Viewed - Print and Mail Now{% er	ment Package Requeste ndif %} {{maybeLoanNur			se %}Disclosures	
Event Request Client Fulfill Sent to DSI Print Queue	Type		{% if NOT Docu	Viewed - Print and Mail Now{% er ument Package Printed {{maybeLo	nent Package Requeste ndif %} {{maybeLoanNur anNumberBrackets}}	mberBrackets}}			
Event Request Client Fulfill Sent to DSI Print Queue Request Paper Copy	Type		{% if NOT DocL eSig: {% if	Viewed - Print and Mail Now{% er	nent Package Requeste dif %} {{maybeLoanNur anNumberBrackets}} er.user.TitleCaseName} 6} Signature Request Co	mberBrackets}} } {{maybeLoan	NumberBrack	kets}}	
Event Request Client Fulfill Sent to DSI Print Queue Request Paper Copy Complete Sigreq	Type	Туре	{% if NOT Docu eSign {% if Com	Viewed - Print and Mail Now(% er iment Package Printed {{maybeLo n Paper Copy Request from {{sign sigreq.status.code == 'SIGNED' %	ment Package Requeste dif %} {{maybeLoanNur anNumberBrackets}} er.user.TitleCaseName} b} Signature Request Co umberBrackets}}	mberBrackets}} } {{maybeLoan	NumberBrack	kets}}	
Compared and the second and the	Type	Type	{% if NOT Docu eSigu {% if Com Sender Invita	Viewed - Print and Mail Now(% er iment Package Printed {{maybeLo n Paper Copy Request from {{sign sigreq.status.code == 'SIGNED' % pleted (% endif %) {{maybeLoanNi	ment Package Requeste dif %} {{maybeLoanNur anNumberBrackets}} er.user.TitleCaseName} b} Signature Request Co umberBrackets}}	mberBrackets}} } {{maybeLoan	NumberBrack	kets}}	
Event Request Client Fulfill Sent to DSI Print Queue Request Paper Copy Complete Sigreq Send Invitation	Týpe e	Type	{% if NOT Doc. eSigu {% if Com Sender Invita Sender Invita	Viewed - Print and Mail Now(% er Imment Package Printed {{maybel.o n Paper Copy Request from {{sign sigreq.status.code == 'SIGNED' % pleted (% endif %) {{maybel.oanNu ation Confirmation {{maybel.oanNu	ment Package Requeste dif %) {(maybeLoanNur anNumberBrackets)} er.user.TitleCaseName} 6) Signature Request Co umberBrackets}} imberBrackets}}	mberBrackets}} } {{maybeLoan	NumberBrack	kets}}	



Disable Preview Mode Toggle

	Set	"Disable Pr	eview	Mode To	oggle"	to Y	es.		
🙀 eSign Console	- Stephen Tr	ekoni osheri na kari kari itt		Scheduler Monitoring	Accounts eSig	n Requests	Create Request	Search	L Account →
LENDER N _{System}	AME (1(0AB)							
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									
			Dé	ALL.					

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



Documents Tab

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

Loan #: 77710031350 Primary Name: John Smith Type: EClosing Package Id: 604824 Worksheet #: 2990 (Version : 2) Closing Date: 9/30/22	Lender:	DSI TI struitt(gic.com	ES) (100SAI	.ES)	Signers:	New (Active) 15 (55 total page 2 N/A (Requires: F Y (Ink Sign)		
Details Documents Documents Received EMails	Versions								B	A 🖨 🌣 🖻
Document Name	ClickSign	Page(s)	Mark(s)	Signer(s)	Completed	Sigreq Docume	nt Id Document Id	Filename	Delete	Operation
Borrower's Certification, Authorization and Consent	×	2	1	1		5175538	8 5187039	bcac.msc.xml		
Multistate Fixed Rate Note		0/4	1	1		517553	5187040	us3200.not.xml		Mark as Complete
New Jersey Mortgage (MERS)		0/19	1	1		5175540	5187041	nj3031.mzm.xml		Mark as Complete
Uniform Residential Loan Application	×	7	1	1		517554	5187042	urla.msc.xml		
Uniform Residential Loan Application - Lender Loan Information	~	2	0	0	 Image: A second s	5175542	2 5187043	urlalli.msc.xml		
Addendum to Closing Instructions	~	1	1	1		5175543	8 5187044	atci3.msc.xml		
Specific Closing Instructions	×	3	4	2		5175544	5187045	sci.msc.xml		
Hazard Insurance Authorization and Requirements	×	2	1	1		517554	i 5187046	hazard8.lsr.xml		
IVES Request for Transcript of Tax Return	~	2	2	1		5175546	6 5187047	4506c.msc.xml		
Closing Disclosure	 Image: A second s	5	1	1		517554	/ 5187048	cd.dsc.xml		
Customer Identification Verification	×	2	0	0	 Image: A second s	5175548	8 5187049	civ.msc.xml		
2 Initial Escrow Account Disclosure Statement	× .	2	1	1		5175549	5187050	ieads.msc.xml		
3 New Jersey Initial Tax Authorization Notice	×	1	0	0	×	5175550	5187051	njitan.msc.xml		
New Jersey Private Well Testing Act Certification	× .	1	1	1		5175551	5187052	njpwt.msc.xml		
5 Signature Affidavit and AKA Statement		0/2	1	1		5175552	2 5187053	saakas.msc.xml		Mark as Complete
▲					Add Inte	mal Note				
			Dé	×LL						

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



Add a Document

eSign Con: le - Steve Trult School Manage Accounts eSign Requests Create Request Search Account Loan & TryTr0031350 Lander: Steve Trult Documents Documents Documents Documents Documents Documents Documents Documents Sign Request School Sign	-	con allows g	you	to	ac	dd d	ocur	ments	to	the p	acka	age.
Loan # 77710031350 Union Smith Type: EClosing Package Id: 604824 Worksheet #: 990 (Version: Glosing Date: 930/22 Details Documents 0020000 0020000 002000000 00200000 002000000 0020000000 0020000000 00200000000												
Primary Name: Type: Eclosing 064824 Booled Package (L) 064824 Booled Package (L) 064824 Booled Package (L) 193022 Upload a new document 060824 0000649-1362 Expire: NA (Requires: Primary) Upload a new document 000649-1362 Upload a new document 000649-1362 000 000 000 000 000 000 000 0	eSign Con: ole - Steve T	ruitt				Scheduler	Monitoring	Accounts eSign Re	equest	s Create Reques	t Search	
Closing Date: 930/22 Upload a new document U	Primary Name: John Smith Type: EClosing		Lender:	DSI TE struitt@	ST LEND		3) (100SALES)) Docum Sig	ents: ners:	15 (55 total pages 2		
Borrower's Certification, A Multistate Fixed Rate Note Submit Car Fel ac.ml Multistate Fixed Rate Note New Jersey Mortgage (MER: Uniform Residential Loan Application - Lender Loan Information 2 0 0 \$175542 \$187043 utriall msc. xml Mark as Complete Uniform Residential Loan Applications 1 1 1 \$175542 \$187043 utriall msc. xml Mark as Complete Addendum to Closing Instructions 1 1 1 \$175543 \$187044 atc3 msc. xml Specific Closing Instructions 3 4 2 \$175543 \$187045 sc. xml VIES Request for Transcript of Tax Return 2 2 1 \$175543 \$187047 4506c.msc. xml VIES Request for Transcript of Tax Return 2 0 0 \$175543 \$187049 civ msc. xml 2 Initial Escrow Account Disclosure Statement 2 1 1 \$175549 \$187050 ieads msc. xml 3 New Jersey Private Well Testing Act Certification 1 1 1 \$175559 \$187051 iplan.msc. xml 4 New Jersey Private Well Testing Act Certification 1 1 1 \$175551	ocuments 👩 💉	Document							Brow			
New Jersey Mortgage (MER) Immuni Mark as Complete Uniform Residential Loan Application - Lender Loan Information 2 0 0 \$175542 \$187043 uriali msc.xml Addendum to Closing Instructions 1 1 1 \$175543 \$187044 atc3 msc.xml Specific Closing Instructions 3 4 2 \$175544 \$187045 sci.msc.xml Hazard Insurance Authorization and Requirements 2 1 1 \$175546 \$187046 hazardl \$1xml VES Request for Transcript of Tax Return 2 2 1 \$175549 \$187048 cd.dsc.xml O Closing Disclosure 5 1 1 \$175549 \$187049 civ.msc.xml 1 Customer Identification Verification 2 0 0 \$175549 \$187050 ieads.msc.xml 2 Initial Escrow Account Disclosure Statement 2 1 1 \$1755549 \$187051 iplan.msc.xml 3 New Jersey Private Well Testing Act Certification 1 1 1 \$175551 \$187052 iplwr.msc.xml 4 New Jersey Private Well Testing Act Certification 1 1 <t< th=""><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th>_1</th><th>sc.xml</th><th></th><th>Operation</th></t<>									_1	sc.xml		Operation
Uniform Residential Loan Application - Lender Loan Information 2 0 0 \$175542 \$187043 uriall msc.xml Addendum to Closing Instructions 1 1 1 5175543 \$187044 atci3 msc.xml Specific Closing Instructions 3 4 2 \$175543 \$187045 sci msc.xml Hazard Insurance Authorization and Requirements 2 1 1 \$175543 \$187046 hazard8 sr.xml IVES Request for Transcript of Tax Return 2 2 1 \$175543 \$187046 hazard8 sr.xml IO Closing Disclosure 5 1 1 \$175543 \$187046 hazard8 sr.xml Closing Disclosure 5 1 1 \$175543 \$187048 cd dsc.xml Customer Identification Verification 2 0 0 \$175548 \$187049 cv msc.xml 1 1 2 1 1 \$175549 \$187050 ieads.msc.xml 2 1 1 \$175549 \$187050 ieads.msc.xml ieads.msc.xml 2 1 1 0 0 \$1755549	Multistate Fixed Rate Note										Mark	as Complete
Addendum to Closing Instructions 1 1 1 1 15175543 5187044 act3 msc.xml Specific Closing Instructions 3 4 2 5175543 5187044 sci.msc.xml Hazard Insurance Authorization and Requirements 2 1 1 5175543 5187044 hazard8 isr.xml IVES Request for Transcript of Tax Return 2 2 1 5175546 5187045 cd.dsc.xml O Closing Disclosure 5 1 1 6175547 5187048 cd.dsc.xml Customer Identification 2 0 0 6175548 5187049 civr.msc.xml 2 1 1 6175549 5187054 ieads.msc.xml ieads.msc.xml 2 0 0 6175548 5187059 ieads.msc.xml 2 1 1 6175549 5187059 ieads.msc.xml 2 1 1 61755549 5187059 ieads.msc.xml 2 1 1 6175559 5187051 njlian.msc.xml 2 1 1 1 5175551 5187052 njpwt.msc.xml 3 New Jersey Private Well Testing Act Certification 1 </td <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>Submit</td> <td>Car</td> <td>cel</td> <td></td> <td></td>								Submit	Car	cel		
Specific Closing Instructions 3 4 2 517554 5187045 scl.msc.xml Hazard Insurance Authorization and Requirements 2 1 1 5175545 5187046 hazard8 isr.xml IVES Request for Transcript of Tax Return 2 2 1 5175546 5187046 4506c.msc.xml O Closing Disclosure 5 1 1 5175546 5187048 cd.dsc.xml Customer Identification 2 0 0 5175548 5187049 civ.msc.xml 2 1 1 5175548 5187049 civ.msc.xml civ.msc.xml 2 0 0 5175548 5187050 ieeds.msc.xml civ.msc.xml 2 1 1 5175549 5187050 ieeds.msc.xml civ.msc.xml 3 New Jersey Private Well Testing Act Certification 1 1 1 5175551 5187052 njøvt.msc.xml 4 New Jersey Private Well Testing Act Certification 1 1 1 5175551 5187053 isakas.msc.xml 5 Signature Affidavit and AKA Statement 0/2 1	New Jersey Mortgage (MERs Uniform Residential Loan Appli							Submit	Car	zel		
Hazard Insurance Authorization and Requirements 2 1 1 5175545 5187046 hazard8 sr.xml IVES Request for Transcript of Tax Return 2 2 1 5175546 5187046 4506c msc.xml I Closing Disclosure 5 1 1 5175547 5187048 cd.dsc.xml Customer Identification Verification 2 0 0 5175548 5187049 civ.msc.xml Linitial Escrow Account Disclosure Statement 2 1 1 5175549 5187050 ieads.msc.xml New Jersey Initial Tax Authorization Notice 1 0 0 5175551 5187051 njlan.msc.xml New Jersey Private Well Testing Act Certification 1 1 1 5175551 5187052 njøvt.msc.xml Signature Affidavit and AKA Statement 0/2 1 1 5175552 5187053 saakas.msc.xml Mark as Complete	New Jersey Mortgage (MER Uniform Residential Loan Appli Uniform Residential Loan Appli	ication - Lender Loan Information	•	-		-	~	5175542 5187043	Car	c.xml urlalli.msc.xml		
IVES Request for Transcript of Tax Return 2 2 1 5175548 5187047 4500c.msc.xml Closing Disclosure 5 1 1 5175548 5187048 cd.dsc.xml Customer Identification Verification 2 0 0 5175548 5187049 civ.msc.xml Linitial Escrow Account Disclosure Statement 2 1 1 5175549 5187059 ieads.msc.xml New Jersey Initial Tax Authorization Notice 1 0 0 5175551 5187051 njlan.msc.xml New Jersey Private Well Testing Act Certification 1 1 1 5175551 5187052 njøvt.msc.xml New Jersey Private Wall Testing Act Certification 1 1 1 5175551 5187052 njøvt.msc.xml New Jersey Private Wall Testing Act Certification 1 1 1 5175552 5187053 saakas.msc.xml Mark as Complete	New Jersey Mortgage (MER: Uniform Residential Loan Appli Uniform Residential Loan Appli Addendum to Closing Instruction	ication - Lender Loan Information	•	1	1	1	*	5175542 5187043 5175543 5187044	Car	c.xml urlalli.msc.xml		
Closing Disclosure 5 1 1 517547 5187048 cd dsc xml Customer Identification Verification 2 0 0 5175548 5187049 civ msc xml Initial Escrow Account Disclosure Statement 2 1 1 5175549 5187050 leads msc xml New Jersey Initial Tax Authorization Notice 1 0 0 5175550 5187051 nitan msc. xml New Jersey Private Well Testing Act Certification 1 1 1 5175551 5187052 nipwt.msc.xml Signature Affidavit and AKA Statement 0/2 1 1 5175552 5187053 saakas msc.xml Mark as Complete	New Jersey Mortgage (MER: Uniform Residential Loan Appli Uniform Residential Loan Appli Addendum to Closing Instructions Specific Closing Instructions	ication - Lender Loan Information	4	1 3	1 4	1 2	*	5175542 5187043 5175543 5187044 5175544 5187045	Car	c xml urlalli.msc.xml atci3.msc.xml sci.msc.xml		
Customer Identification Verification 2 0 0 \$175548 \$187049 cv msc. xml Itilial Escrow Account Disclosure Statement 2 1 1 \$175549 \$187050 ieads.msc. xml New Jersey Initial Tax Authorization Notice 1 0 0 \$175550 \$187051 njtan.msc. xml New Jersey Private Well Testing Act Certification 1 1 1 \$175551 \$187052 njpwt.msc.xml Signature Affidavit and AKA Statement 0/2 1 1 \$175552 \$187053 saakas.msc.xml Mark as Complete	New Jersey Mortgage (MER: Uniform Residential Loan Appli Uniform Residential Loan Appli Addendum to Closing Instructions Specific Closing Instructions Hazard Insurance Authorization	cation - Lender Loan Information ons n and Requirements	2 2 2	1 3 2	1 4 1	1 2 1	*	5175542 5187043 5175543 5187044 5175544 5187045 5175545 5187046	Car	c xml c xml urlalli.msc xml atci3.msc xml sci.msc xml hazard8.lsr.xml		
Initial Escrow Account Disclosure Statement 2 1 1 5175540 [5187050 ieads msc.xml New Jersey Initial Tax Authorization Notice 1 0 0 5175550 [5187051 njitan.msc.xml New Jersey Private Well Testing Act Certification 1 1 1 5175551 [5187052 njiwt.msc.xml Signature Affidavit and AKA Statement 0/2 1 1 5175552 [5187053 sakas.msc.xml	New Jersey Mortgage (MER: Uniform Residential Loan Appli Uniform Residential Loan Appli Addendum to Closing Instructions Specific Closing Instructions Hazard Insurance Authorization IVES Request for Transcript of	cation - Lender Loan Information ons n and Requirements	* * * *	1 3 2 2	1 4 1 2	1 2 1 1	*	5175542 5187043 5175543 5187044 5175544 5187045 5175545 5187046 5175546 5187047	Car	c xml c xml urlalli.msc xml atci3.msc xml sci.msc xml hazard8.lsr.xml 4506c.msc xml		
New Jersey Initial Tax Authorization Notice 1 0 0 \$175550 \$187051 njitan.msc.xml New Jersey Private Well Testing Act Certification 1 1 1 \$175551 \$187052 njiwt.msc.xml Signature Affidavit and AKA Statement 0/2 1 1 \$175552 \$187053 saakas.msc.xml	New Jersey Mortgage (MER: Uniform Residential Loan Appli Uniform Residential Loan Appli Addendum to Closing Instructions Specific Closing Instructions Hazard Insurance Authorization IVES Request for Transcript of Closing Disclosure	cation - Lender Loan Information ons n and Requirements Tax Return	* * * *	1 3 2 2 5	1 4 1 2 1	1 2 1 1 1	*	5175542 5187043 5175543 5187044 5175544 5187045 5175545 5187046 5175546 5187047 5175546 5187047	Car	c xml c xml urlalli.msc xml atci3.msc xml sci.msc xml hazard8.lsr.xml 4506c.msc xml cd.dsc xml		
A New Jersey Private Well Testing Act Certification I 1 1 5175551 5187052 njpwt.msc.xml 5 Signature Affidavit and AKA Statement 0/2 1 1 5175552 5187053 saakas msc.xml Mark as Complete	New Jersey Mortgage (MER: Uniform Residential Loan Appli Uniform Residential Loan Appli Addendum to Closing Instruction Specific Closing Instructions Hazard Insurance Authorization VIES Request for Transcript of Closing Disclosure Customer Identification Verifica	cation - Lender Loan Information ons n and Requirements Tax Return attion	* * * * *	1 3 2 2 5 2	1 4 1 2 1 0	1 2 1 1 1 1 0	¥ •	5175542 5187043 5175543 5187044 5175544 5187045 5175545 5187046 5175546 5187047 5175546 5187048 5175547 5187048	Car	c xmi c xmi urlall:msc xmi atci3.msc xmi sci.msc xmi hazard8.lsr.xmi 4506c msc xmi cd.dsc xmi		
5 Signature Affidavit and AKA Statement 0/2 1 1 5175552 5187053 saakas msc.xml Mark as Complete	New Jersey Mortgage (MER: Uniform Residential Loan Appli Uniform Residential Loan Appli Addendum to Closing Instruction Specific Closing Instructions Hazard Insurance Authorizations IVES Request for Transcript of Closing Disclosure Customer Identification Verifica Initial Escrow Account Disclosu	cation - Lender Loan Information ons n and Requirements Tax Return ation re Statement		1 3 2 2 5 2 2 2	1 4 1 2 1 0 1	1 2 1 1 1 1 0 1	4	5175542 5187043 5175543 5187043 5175543 5187044 5175545 5187046 5175546 5187046 5175546 5187047 5175547 5187048 5175548 5187049 5175548 5187050	Car	c m m c m c m c m c m c m c m c m c m c		
	New Jersey Mortgage (MER: Uniform Residential Loan Appli Uniform Residential Loan Appli Addendum to Closing Instruction Specific Closing Instructions Hazard Insurance Authorization IVES Request for Transcript of O Closing Disclosure Customer Identification Verifica Initial Escrow Account Disclosu New Jersey Initial Tax Authorizz	cation - Lender Loan Information ons n and Requirements Tax Return ation ure Statement ation Notice	* * * * * * * *	1 3 2 2 5 2 2 2 1	1 4 1 2 1 0 1 0	1 2 1 1 1 1 0 1 0	¥ •	5175542 5187043 5175543 5187044 5175543 5187044 5175545 5187046 5175546 5187046 5175546 5187047 5175547 5187048 5175548 5187049 5175549 5187050 5175550 5187051	Car	c mi uriali msc xmi atci3 msc xmi atci3 msc xmi hazard8 isr xmi 4506c msc xmi c d dsc xmi c iv msc xmi ieads msc xmi		
	New Jersey Mortgage (MER- Uniform Residential Loan Appli Uniform Residential Loan Appli Addendum to Closing Instruction Specific Closing Instructions Hazard Insurance Authorization IVES Request for Transcript of O Closing Disclosure Customer Identification Verifica Initial Escrow Account Disclosu New Jersey Initial Tax Authorizz New Jersey Private Well Testin	cation - Lender Loan Information ons n and Requirements Tax Return ttion rer Statement ation Notice g Act Certification	* * * * * * * *	1 3 2 2 5 2 2 2 1 1	1 4 1 2 1 0 1 0 1	1 2 1 1 1 1 0 1 0 1	* * *	5175542 5187043 5175543 5187043 5175544 5187044 5175544 5187046 5175546 5187046 5175546 5187048 5175548 5187049 5175549 5187059 5175550 5187051 5175551 5187052	Car	zm. xml c. xml urlalli msc. xml atci3 msc. xml scci msc. xml hazard8 isr.xml 45066 msc. xml cd dsc. xml ieads. msc. xml ieads. msc. xml njitan msc. xml	Mark	as Complete
	New Jersey Mortgage (MER- Uniform Residential Loan Appli Uniform Residential Loan Appli Addendum to Closing Instruction Specific Closing Instructions Hazard Insurance Authorization IVES Request for Transcript of O Closing Disclosure Customer Identification Verifica Initial Escrow Account Disclosu New Jersey Initial Tax Authorizz New Jersey Private Well Testin	cation - Lender Loan Information ons n and Requirements Tax Return ttion rer Statement ation Notice g Act Certification	* * * * * * * *	1 3 2 2 5 2 2 2 1 1	1 4 1 2 1 0 1 0 1	1 2 1 1 1 1 0 1 0 1	-	5175542 5187043 5175543 5187043 5175543 5187045 5175546 5187046 5175546 5187046 5175546 5187047 5175548 5187049 5175549 5187050 5175550 5187051 5175551 5187052 5175552 5187053	Car	zm. xml c. xml urlalli msc. xml atci3 msc. xml scci msc. xml hazard8 isr.xml 45066 msc. xml cd dsc. xml ieads. msc. xml ieads. msc. xml njitan msc. xml	Mark	as Complete
	New Jersey Mortgage (MER: Uniform Residential Loan Appli Uniform Residential Loan Appli Addendum to Closing Instruction Specific Closing Instructions Hazard Insurance Authorization IVES Request for Transcript of O Closing Disclosure Customer Identification Verifica Initial Escrow Account Disclosu New Jersey Initial Tax Authorizz New Jersey Private Well Testin	cation - Lender Loan Information ons n and Requirements Tax Return ttion rer Statement ation Notice g Act Certification	* * * * * * * *	1 3 2 2 5 2 2 2 1 1	1 4 1 2 1 0 1 0 1	1 2 1 1 1 1 0 1 0 1	-	5175542 5187043 5175543 5187043 5175543 5187045 5175546 5187046 5175546 5187046 5175546 5187047 5175548 5187049 5175549 5187050 5175550 5187051 5175551 5187052 5175552 5187053	Car	zm. xml c. xml urlalli msc. xml atci3 msc. xml scci msc. xml hazard8 isr.xml 45066 msc. xml cd dsc. xml ieads. msc. xml ieads. msc. xml njitan msc. xml	Mark	as Complete

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



AutoPrep

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

9 8 A	utoPrep	
	p complete! your review.	
	aisal.pdf	
 Assigned signatures 	ণ	
🐣 Notary Fields	0	
Requires Validation	0	
	Next	
•	6LL	

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



AutoPrep

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

1johnsandysmith_title Prepare documents for sig		Done
	Q 100% €	< T Commission Number
	[Space Below This Line For Acknowledgment]	Assigned to
phone at a second contract of them.	A notary public or other officer completing this certificate verifies only the identity of the individ. Signe the document to which this certificate is attached, and not the truthfulness, accuracy, or validity of that document	Notary
		Required
14	State of <u>CALIFORNIA</u>) County of <u>LOS ANGELES</u>)	
	On Date before me, 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 t	
15	within instrument and acknowledged to me that he she' they executed the same in his/her/their authorized capacity(ie and that by his/her/their signature(s) on the instrument the person(s), or the entity upon behalf of which the person acted, executed the instrument.	
	I certify under PENALTY OF PERJURY under the laws of the State of California that the foregoing paragraph is tr and correct.	
	WITNESS my hand and official seal.	
	د Signature و Signature of Notary Public	



Refresh

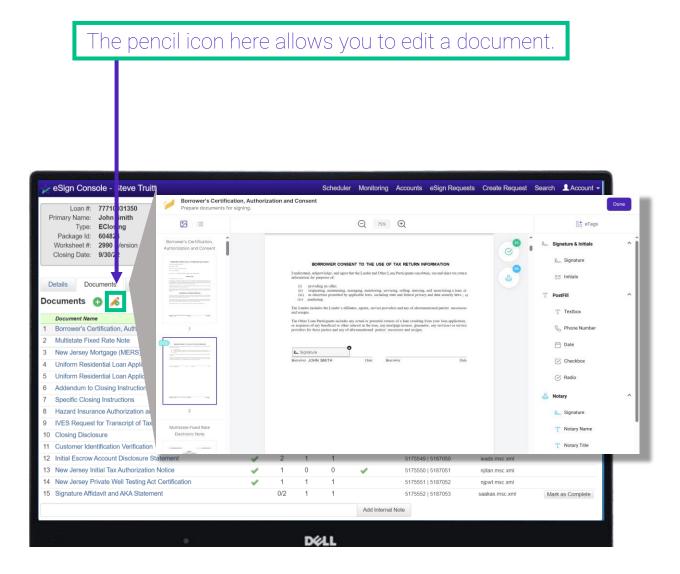
Clicking Done will take you back to the Loan. Click on the Documents tab and refresh the page.

Primary Name Type: John Smith InitialDisclosure Segurité Document Segurité Segurité Se		eSign Con: ole - Steve Truitt						Sched	uler Monitoring Acco	ounts
Documents No Signer(s) Completed Signer(s) <		rimary Nama: John Smith Type: InitialDisclosure Package Id: 590176 Worksheet #: 2906 (Version : 1)	Lender.	DSI TEST LEI struitt@docma	gic.com	ES) (100S	ALES)		Signers:	16 (3 N/A
Document NameClickSignPage(s)Mark(s)Signer(s)CompletedSigner(s)Signer(s)CompletedSigner(s)Signer(s)Signer(s)CompletedSigner(s)										
1 Borrower's Certification, Authorization and Consent 2 1 1 5092137 [5] 2 Uniform Residential Loan Application 7 1 1 5092130 [5] 3 Uniform Residential Loan Application - Lender Loan Information 2 0 0 9092130 [5] 4 Virginia Disclosure of Terms of Mortgage Application 1 1 1 5092140 [5] 5 IVES Request for Transcript of Tax Return 2 2 1 1 5092141 [5] 6 Authorization for the Social Security Administration to Release SSN Verification 0/1 1 1 5092142 [5] 7 Housing Counselors Near You 6 0 0 9 5092143 [5] 8 Important Information About Procedures For Opening A New Account 1 1 1 5092146 [5] 10 Lender Record Change 2 0 0 9 5092147 [5] 11 Loan Estimate 3 3 1 5092146 [5] 12 Lender Record Change 2 1 1 5092147 [5] 13 Uriginia Hazard Insurance Disclosure	Doe				-					
2 Uniform Residential Loan Application 7 1 1 5092139 [51] 3 Uniform Residential Loan Application - Lender Loan Information 2 0 0 \$5092139 [51] 4 Virginia Disclosure of Terms of Mortgage Application 1 1 1 1 \$5092149 [51] 5 IVES Request for Transcript of Tax Return 2 2 1 \$5092141 [51] 6 Authorization for the Social Security Administration to Release SSN Verification 0/1 1 1 1 \$5092143 [51] 7 Housing Counselors Near You 6 0 0 \$5092143 [51] 8 Important Information About Procedures For Opening A New Account 1 1 1 \$5092143 [51] 9 Iowa Subordination Agreement 4 0 0 \$5092146 [51] 10 Lender Record Change 3 3 1 \$5092146 [51] 11 Loan Estimate 3 3 1 \$5092146 [51] 12 Settlement Services Provider List 2 1 1 \$5092146 [51] 12 Settlement Services Provider List 2<	1							Completed	Sigreq Document Id Doci 5092137 5103638	
3 Uniform Residential Loan Application - Lender Loan Information 2 0 0 \$002139 51 4 Virginia Disclosure of Terms of Mortgage Application 1 1 1 1 \$002140 51 5 IVES Request for Transcript of Tax Return 2 2 1 \$002141 51 6 Authorization for the Social Security Administration to Release SSN Verification 0/1 1 1 1 \$002142 51 7 Housing Counselors Near You 6 0 0 \$002143 51 8 Important Information About Procedures For Opening A New Account 1 1 1 \$002144 51 9 Iowa Subordination Agreement 4 0 0 \$002146 51 10 Lender Record Change 2 0 0 \$002146 51 11 Loan Estimate 3 3 1 \$002146 51 12 Settlement Services Provider List 2 1 1 \$002146 51 13 Virginia Lock in Agreement 2 1 1 \$002146 51 13 Virginia Lock in Agreement 2 1	2								5092138 5103639	
4 Virginia Disclosure of Terms of Mortgage Application 1 1 1 1 1 5092140151 5 IVES Request for Transcript of Tax Return 2 2 1 5092141151 6 Authorization for the Social Security Administration to Release SSN Verification 0/1 1 1 1 5092142151 7 Housing Counselors Near You 6 0 0 4092142151 5092143151 8 Important Information About Procedures For Opening A New Account 1 1 1 1 5092145151 9 Iowa Subordination Agreement 4 0 0 4092146151 5092146151 10 Lender Record Change 2 0 0 4092146151 5092146151 11 Loaner Stimate 3 3 1 5092146151 5092146151 12 Settlement Services Provider List 2 1 1 5092146151 13 Virginia Hazard Insurance Disclosure 1 1 1 5092146151 14 Virginia Lock in Agreement 2 1 1 5092146151								4	5092139 5103640	
5 IVES Request for Transcript of Tax Return 2 2 1 5092141 [51 6 Authorization for the Social Security Administration to Release SSN Verification 0/1 1 1 1 5092142 [51 7 Housing Counselors Near You 6 0 0 \$092143 [51 8 Important Information About Procedures For Opening A New Account 1 1 1 1 5092143 [51 9 Iowa Subordination Agreement 4 0 0 \$092141 [51 5092145 [51 10 Lender Record Change 2 0 0 \$092141 [51 11 Loan Estimate 3 3 1 \$092141 [51 12 Settlement Services Provider List 2 1 1 \$092146 [51 13 Virginia Hazard Insurance Disclosure 1 1 1 \$092149 [51 14 Virginia Lock in Agreement 2 1 1 \$092149 [51 14 Virginia Lock in Agreement 2 0 0 \$092150 [51 15 Your Home Loan Toolkit 2 0 0 \$092150 [51 <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>*</td> <td>5092140 5103641</td> <td></td>								*	5092140 5103641	
6 Authorization for the Social Security Administration to Release SSN Verification 0/1 1 1 1 5092142 51 7 Housing Counselors Near You 6 0 0 \$5992143 51 8 Important Information About Procedures For Opening A New Account 1 1 1 1 5992144 51 9 Iowa Subordination Agreement 4 0 0 \$5992146 51 10 Leader Record Change 2 0 0 \$5992146 51 11 Loan Estimate 3 3 1 \$5992146 51 12 Settlement Services Provider List 2 1 1 \$992146 51 13 Virginia Hazard Insurance Disclosure 1 1 1 \$992146 51 14 Virginia Lock in Agreement 2 1 1 \$992146 51 14 Virginia Lock in Agreement 2 1 1 \$992150 51 15 Your Home Loan Tookit 2 0 0 \$992151 51 16 appraisal 8 2 1 \$992206 51	5				2	2	1		5092141 5103642	
7 Housing Counselors Near You							1		5092142 5103643	
8 Important Information About Procedures For Opening A New Account 1 1 1 1 1 1 5092144 51 9 Iowa Subordination Agreement 4 0 0 4 5092145 51 10 Lender Record Change 2 0 0 4 5092146 51 11 Loan Estimate 3 3 1 5092146 51 12 Settlement Services Provider List 2 1 1 5092146 51 13 Virginia Hazard Insurance Disclosure 1 1 1 5092149 51 14 Virginia Lock in Agreement 2 1 1 5092149 51 15 Your Home Loan Toolkit 2 0 0 5092151 51 16 appraisal 8 2 1 5092206 51				4	6	0	0	J	5092143 5103644	
9 lowa Subordination Agreement 4 0 0 9 10 Lender Record Change 2 0 0 9 10 Lender Record Change 2 0 0 2 1 1					-			*	5092144 5103645	
10 Lender Record Change 2 0 0 ✓ 5092146151 11 Loan Estimate 3 3 1 5092146151 12 Settlement Services Provider List ✓ 2 1 1 5092146151 12 Settlement Services Provider List ✓ 2 1 1 5092146151 13 Virginia Hazard Insurance Disclosure ✓ 1 1 1 5092146151 14 Virginia Lock in Agreement ✓ 2 1 1 5092146151 15 Your Home Loan Toolkit ✓ 28 0 0 ✓ 5092151151 16 appraisal ✓ 8 2 1 5092266151					4	0	0	1	5092145 5103646	
11 Loan Estimate Image: Settlement Services Provider List Settleme	10				2	0	0		5092146 5103647	,
13 Virginia Hazard Insurance Disclosure 1 1 1 5092149 [5h] 14 Virginia Lock in Agreement 2 1 1 5092150 [5h] 15 Your Home Loan Toolkit 28 0 9 5092151 [5h] 16 appraisal 8 2 1 5092266 [5h]	11			4	3	3	1		5092147 5103648	8
14 Virginia Lock in Agreement 2 1 1 5092150 51 15 Your Home Loan Toolkit 28 0 0 \$0922151 51 16 appraisal 8 2 1 \$092266 51	12	Settlement Services Provider List		1	2	1	1		5092148 5103649	3
15 Your Home Loan Toolkit 28 0 9 5092151151 16 appraisal 8 2 1 5092266151	13	Virginia Hazard Insurance Disclosure		4	1	1	1		5092149 5103650	ð
16 appraisal 🖋 8 2 1 5092266 51	14	Virginia Lock in Agreement		1	2	1	1		5092150 5103651	1
	15	Your Home Loan Toolkit		3	28	0	0	4	5092151 5103652	2
	16	appraisal		4	8	2	1		5092266 5103767	7
		•						Add Internal Note		
Déll		13 A A A A A A A A A A A A A A A A A A A	Dél	L						

The document that you added will appear at the bottom.



Edit Document



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



Documents Received

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

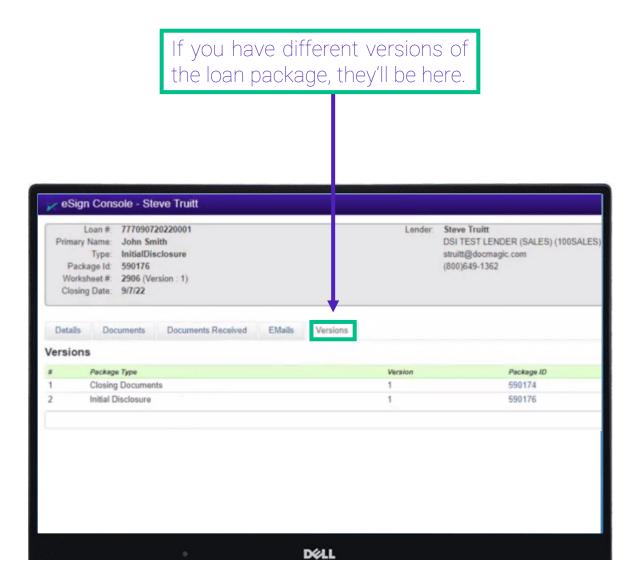


Emails

🖌 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) (100SALE struitt@docmagic.com (800)649-1362
Details Documents Documents	s Received EMails Versions	
	s Received EMails Versions	To:
Emails		7o: struitt@docmagic.co
Emails Created	Event	
Emails Created 9/7/22, 11:04 AM	Event SendInvitation	struitt@docmagic.com
Emails Created 9/7/22, 11:04 AM 9/7/22, 11:04 AM	Event SendInvitation SendInvitation	struitt@docmagic.co struitt@docmagic.co
Emails Created 9/7/22, 11:04 AM 9/7/22, 11:04 AM 9/7/22, 11:04 AM	Event SendInvitation SendInvitation SendInvitation	struitt@docmagic.co struitt@docmagic.co struitt@docmagic.co
Emails Created 9/7/22, 11:04 AM 9/7/22, 11:04 AM 9/7/22, 11:04 AM 9/7/22, 11:04 AM	Event SendInvitation SendInvitation SendInvitation SendInvitation	struitt@docmagic.co struitt@docmagic.co struitt@docmagic.co struitt@docmagic.co
Emails Created 9/7/22, 11:04 AM 9/7/22, 11:04 AM 9/7/22, 11:04 AM 9/7/22, 11:04 AM 9/7/22, 11:04 AM	Event SendInvitation SendInvitation SendInvitation SendInvitation SendInvitation	struitt@docmagic.co struitt@docmagic.co struitt@docmagic.co struitt@docmagic.co struitt@docmagic.co
Emails Created 9/7/22, 11:04 AM 9/7/22, 11:04 AM 9/7/22, 11:04 AM 9/7/22, 11:04 AM 9/7/22, 11:104 AM 9/7/22, 11:17 AM 9/7/22, 11:19 AM	Event SendInvitation SendInvitation SendInvitation SendInvitation SendInvitation ConsentEsign	struitt@docmagic.co struitt@docmagic.co struitt@docmagic.co struitt@docmagic.co struitt@docmagic.co struitt@docmagic.co



Versions





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.

										Return	to Search
Type: ECIC Package Id: 6042	n Smith psing 182 (Version : 1)	Lender:		ENDER (SA	.ES) (100SAL	:S)	Documents: Signers:	N/A (Requ			no search
Details Documen	ts Documents Received	EMails Versions							G	P 🔒	858
articipants 🛃									1	Preview	Mode - Off
Name/Email		Role	Created	Started	Consented	Viewed	Completed	Declined	Links		
John Smith ron@docmagic.com		Borrower	10/3/22 1:54 PM						Send Emi Sign Doci		
Andy Agent ron@docmagic.com		Settlement Agent	10/3/22 1:54 PM						Send Email Agent Pol		
Notary_name_place NOTARY_EMAIL_PLAC		Notary	10/3/22 1:54 PM						Send Ema	ail	
ction Log											
ate	User	IPA	ddress	De	scription						
0/3/22 1:54 PM	System User			es	ign event crea	ted					
0/3/22 1:54 PM	John Smith			In	vitation sent to	ron@docma	gic.com				
0/3/22 1:54 PM	Andy Agent			In	vitation sent to	ron@docma	gic.com				
					Add Intern	al Note					
									Cancel Request	Delete	e Request

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



Borrower's Signing Experience

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

☆ DocMagic	💿 Review 🚫 Sign 🤎 Completed	JS JOHN SMITH Customer ~
Please review your documents.	Initial Disclosure Borrower's Certification, Authorization and Consent	Start signing
		Borrower's Certification, Authorization and
I understand, acknowledge, and agree that the information for purposes of: (i) providing an offer; (ii) originating, maintaining, managir (iii) as otherwise permitted by applical (iv) marketing The Lender includes the Lender's affiliates, a and assigns. The Other Loan Participants includes any act	TO THE USE OF TAX RETURN INFORMATION Lender and Other Loan Participants can obtain, use and share tax return g, monitoring, servicing, selling, insuring, and securitizing a loan; or ole laws, including state and federal privacy and data security laws; ; or gents, service providers and any of aforementioned parties' successors hal or potential owners of a loan resulting from your loan application, in the loan, any mortgage insurer, guarantor, any servicers or service entioned parties' successors and assigns.	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
Signature Borrower JOHN SMITH	Date Borrower Date	Housing Counselors Near You 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 <u>Product Training Page</u>.



Post Borrower Signing

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

	- Steve Truitt						Schedu	der Monitoring	Accounts eSig	n Requests Create Reque	est Search 💄 Account
Primary Name: Joi	ialDisclosure 176 6 (Version : 1)		Lend	er: Steve Truitt DSI TEST LEN(struitt@docmag (800)649-1362	DER (SALES) (10 ic.com	IOSALES)		Document Signer Expire	in Progress a 16 (72 total a 3 a N/A (Requir a Y (Ink Sign)	pages) res: Primary)	
Details Docume	nts Documents Received	EMails Ver	sions			•	,				
Participants											Preview Mode - 0
# NameEmail			Role	Created	Started	Consented	Viewed	Completed	Declined	Links	
1 John Smith			Borrower	9/7/22	9/7/22	9/7/22	9/7/22	9/7/22	Peconeo	Send Email	4506-C
strutt@docmagic.co				11.04 AM	11:19 AM	11:19 AM	11.19 AM	11.31 AM		se Sign Documents	
3 Andy Agent struit@docmapic.co			Settlement Agent	9/7/22 11:94 AM						Send Email as Agent Portal	B
4 Stephen Truitt struitt221@gmail.com			Other	9/7/22 11.17 AM						C Send Email	
Date	User	IP Address	Description								
Date 9/7/22 1 14 AM	System User	i ^p Address	eSign event created								
Date 9/7/22 1 14 AM 9/7/22 1 04 AM	System User John Smith	IP Address	eSign event created Invitation sent to str	uitt@docmagic.com							
Date 9/7/22 1 14 AM 9/7/22 1 04 AM 9/7/22 1 04 AM	System User John Smith Andy Agent	IP Addreas	eSign event created Invitation sent to str Invitation sent to str	uitt@docmagic.com uitt@docmagic.com							
Date 9/7/22 1 14 AM 9/7/22 1 14 AM 9/7/22 1 14 AM 9/7/22 1 17 AM	System User John Smith Andy Agent Steve Truitt	IP Addreas	eSign event created Invitation sent to str Invitation sent to str Stephen Truitt (strui	uitt@docmagic.com uitt@docmagic.com itt221@gmail.com) a	ided as Other						
Date 9/7/22 1 14 AM 9/7/22 1 14 AM 9/7/22 1 14 AM 9/7/22 1 17 AM 9/7/22 1 17 AM	System User John Smith Andy Agent Steve Truitt Stephen Truitt	IP Address	eSign event created Invitation sent to str Invitation sent to str Stephen Truitt (strui Invitation sent to str	uitt@docmagic.com uitt@docmagic.com Itt221@gmail.com) a uitt221@gmail.com	ded as Other						
Date 9/7/22 1 14 AM 9/7/22 1 13 AM 9/7/22 1 14 AM 9/7/22 1 14 AM 9/7/22 1 17 AM 9/7/22 1 17 AM 9/7/22 1 19 AM	System User John Smith Andy Agent Steve Truitt	P Address	eSign event created Invitation sent to str Invitation sent to str Stephen Truitt (strui Invitation sent to str Consented to DocM	uitt@docmagic.com uitt@docmagic.com tt221@gmail.com) a uitt221@gmail.com lagic eSign							
Date 9/7/22 1 14 AM 9/7/22 1 13 AM 9/7/22 1 14 AM 9/7/22 1 17 AM 9/7/22 1 17 AM 9/7/22 1 19 AM 9/7/22 1 19 AM	System User John Smith Andy Agent Steve Truitt Stephen Truitt John Smith	P Address	eSign event created Invitation sent to str Invitation sent to str Stephen Truitt (strui Invitation sent to str Consented to DocM	uitt@docmagic.com uitt@docmagic.com #221@gmail.com) a uitt221@gmail.com lagic eSign							
9/7/22 1 04 AM 9/7/22 1 04 AM 9/7/22 1 17 AM 9/7/22 1 17 AM 9/7/22 1 19 AM 9/7/22 1 19 AM	System User John Smith Andy Agent Steve Truitt Stephen Truitt John Smith John Smith	P Address	eSign event created Invitation sent to str Invitation sent to str Stephen Truitt (strui Invitation sent to str Consented to DocM Receipt of early dee eSign event started	uitt@docmagic.com uitt@docmagic.com #221@gmail.com) a uitt221@gmail.com lagic eSign	isesa days met	22, 11:04 AM PDT (Sisplayed				
Date 9/7/22 1 44 AM 9/7/22 1 44 AM 9/7/22 1 44 AM 9/7/22 1 44 AM 9/7/22 1 47 AM 9/7/22 1 17 AM 9/7/22 1 19 AM 9/7/22 1 19 AM 9/7/22 1 19 AM	System User John Smith Andy Agent Streve Truit Stephen Truit John Smith John Smith John Smith	Ø Address	eSign event created Invitation sent to str Invitation sent to str Stephen Truitt (strui Invitation sent to str Consented to DocM Receipt of early dee eSign event started	uitt@docmagic.com uitt@docmagic.com tt221@gmail.com) a uitt221@gmail.com lagic.eSign science.witchin@1com rsion 1 prepared on 5	isesa days met	22, 11:04 AM PDT c	Sisplayed				
Date 97/722 1 4 AM 97/722 1 4 AM 97/722 1 4 AM 97/722 1 17 AM 97/722 1 17 AM 97/722 1 19 AM 97/722 1 10 AM 97/722 1 10 AM 97/722 1 10 AM 97/722 1 10 AM	System User John Smith Andy Agent Steye Fruit Stephen Fruit John Smith John Smith John Smith John Smith Steve Truit System User	P Address	eSign event created Invitation sent to str Invitation sent to str Stephen Truitt (strui Invitation sent to str Consented to Dock Rocegid el sañ) das eSign event started Initial Disclosure ve Document batch up Date: 2022-09-07 1	uitt@docmagic.com uitt@docmagic.com tt221@gmail.com) ar uitt221@gmail.com lagic.eSign commercenter sion 1 prepared on 5 load.completed 1.30.09 InkSign Fax	isess days met September 07, 20 received for docu	ment: 5103643 ()					
Date 97/22 1 4 M 97/22 1 4 M 97/22 1 4 M 97/22 1 1 4 97/22 1 1 4 97/22 1 1 4 97/22 1 1 4 97/22 1 9 4 97/22 1 9 4 97/22 1 9 4 97/22 1 9 4 97/22 1 9 4 97/22 1 9 4 97/722 1 9 4 97/722 1 9 4 97/722 1 9 4 97/722 1 9 4 97/722 1 9 4 97/722 1 9 4 97/722 1 9 4 <tr tbody=""></tr>	System User John Smith Andy Agent Stave Truit Stephen Truit John Smith John Smith John Smith Stave Truit System User John Smith	P Address	eSign event created Invitation sent to str Invitation sent to str Stephen Truit (strui Invitation sent to str Consented to DocM Receipt of early die eSign event started Initial Disclosure ve Document batch up Data: 2022-09-07 1 Authorization for the	uitt@docmagic.com uitt@docmagic.com ttt21(@gmail.com) a uitt221@gmail.com) a docestign	Reptember 07, 20 Reptember 07, 20 Received for docu	ment: 5103643 ()		1 Smith			
Date 97122 1 4 AM 97122 1 7 AM 97122 1 7 AM 97122 1 9 AM 97122 1 0 AM	System User John Smith Andy Agent Steve Truitt John Smith John Smith John Smith Steve Truitt System User John Smith John Smith John Smith	PAdress	eSign event created Invitation sent to str Invitation sent to str Stephen Truitt (strui Invitation sent to str Consented to DocM Receipt of early dos eSign event started Initial Disclosure ve Document batch up Date: 2022-99-71 Authorization for th Approved electronic	uitt@docmagic.com uitt@docmagic.com uitt@1@gmail.com a uitt21@gmail.com agic.eSign rsion 1 prepared on 2 load.completed 1.30 ocial Security.Adm : representation of sig	iness days met Reptember 07, 20 received for docu inistration to Reli- pnature	ment: 5103643 ()		1 Smith			
Date 9/7122 1 4 AM 9/7122 1 4 AM 9/7122 1 17 AM 9/7122 1 17 AM 9/7122 1 17 AM 9/7122 1 19 AM 9/7122 1 9 AM 9/7122 1 9 AM 9/7122 1 0 AM 9/7122 1 0 AM 9/7122 10 AM 9/7122 9/7122 1 0 AM 9/7122 1 AM 9/7122 9/7124 1 AM 9/7124 1	System User John Smith Andy Agent Steve Truit Steve Truit John Smith John Smith John Smith Steve Truit System User John Smith John Smith John Smith	PAdrus	eSign event create Invitation sent to str Invitation sent to str Stephen Truit (struit Invitation sent to str Consented to Dock Receipt of early door eSign event started Initial Disclosure ve Document batch up Date: 2022-09-07 11 Authorization for the Approved electronic Approved electronic	uitt@docmagic.com witt@docmagic.com #221@gmail.com !#221@gmail.com !agic.eSign documes.within 3 boo rsion 1 prepared on 2 load completed 1:30.09 InkSign Fax x 5 Social Security Adm 5 social Security Adm	isess days met Reptamber 07, 20 eceived for docu inistration to Reli mature mature	ment. 5103643 () ease SSN Verificatio		s Smith			
Date Status 9/722 10 A.M. 9/722 11 9.M. 9/722 11 9.M. 9/722 11 9.M. 9/722 12 A.M. 9/722 10 A.M. 9/722 11 A.M.	System User John Smith Andy Agent Steve Trutt Stephen Trutt John Smith John Smith John Smith Steve Trutt System User John Smith John Smith John Smith John Smith	PAdras	elSign event creater Invitation sent to str Invitation sent to str Stephen Truit (struit Invitation sent to str Consented to Dock Receipt of early die elSign event started Initial Disclosure ve Document bath up Date: 2022-99-07 11 Authorization for the Approved electronic Approved electronic Berroweit's Centifica	uitt@docmagic.com uitt@docmagic.com uitt@docmagic.com ut221@gmail.com) as ut221@gmail.com lagic.eSign docenes.within 3 hon ension 1 prepared on 2 load completed 1 30 05 InkSign Fax a Social Security Adm representation of sig tion. Authorization ar	isses days met September 07, 20 eceived for docu inistration to Rele pature instrutire d Consent signed	ment: 5103643 () ease SSN Verificatio d by JOHN SMITH		r Senith			
Date 97/22 1 4 AM 97/22 1 4 AM 97/22 1 4 AM 97/22 1 7 AM 97/22 1 7 AM 97/22 1 9 AM 97/22 1 AM 9 97/22 1 AM 9 97/22 1 AM 9	System User John Smith Andy Agent Steve Truit Stephen Truit John Smith John Smith John Smith John Smith John Smith John Smith John Smith John Smith John Smith	Pidgus	«Sign event create Invitation sent to shi Imritation sent to shi Imritation sent to shi Imritation sent to shi Consented to Dock Respired and the shift of the sign event started Initial Disclosure were shared and Disclosure were shared Document batch up Document batch up Document batch up Document batch up Document batch up Document batch up Document Centrifica Unitom Residential Disclosure Residential	uitt@docmagic.com uitt@docmagic.com #221@gmail.com) au #221@gmail.com agic eSign documes.untivite Ion resion 1 prepared on 5 load completed 1:30.05 Int.Sign Fax i Social Security Adm representation of sig representation of sig representation of sig representation of sig	sess days met eptember 07, 20 eceived for docu inistration to Rele pature pature d Consent signe- ned by JOHN SM	ment: 5103643 () ease SSN Verificatio d by JOHN SMITH IITH	in signed by John	n Senith			
Date \$\$\T722\$ 1 \$\$ A.M. \$\$\$\T722\$ 1 \$\$ A.M. \$	System User John Smith Andy Agent Sterve Trutt John Smith John Smith John Smith Sterve Trutt System User John Smith John Smith John Smith John Smith John Smith	Ø Adgess	«Sign event create Invitation sent to sh Invitation sent to sh Invitation sent to sh Invitation sent to sh Consented to Deck Principal di early dia «Sign event started Inbial Disclosure ve Document batch up Date: 222-89-21 Authoritation for th Approved electronic Borrower's Centifica Uniform Residentia Viginia Disclosure.	uitl@docmagic.com uitl@docmagic.com uitl@docmagic.com uitl221@gmail.com) a uitl221@gmail.com lagic.e3gn <u>docseres.within 3 bool</u> solor to prepared on 3 load completed 1 30.09 inkSign Fax (bool completed 1 30.09 inkSign Fax (s Social Security Adm representation of sig tion, Authorization and of Terms of Mortgage	sease days met september 07, 20 eceived for docu inistration to Reli pature gnature d Consent signer ned by JOHN SM Application signe	ment: 5103643 () ease SSN Verification d by JOHN SMITH IITH ed by JOHN SMITH	in signed by John	s Smith			
Date 97/22 1 4 AM 97/22 1 4 AM 97/22 1 4 AM 97/22 1 7 AM 97/22 1 7 AM 97/22 1 9 AM 97/22 1 AM 9 97/22 1 AM 9 97/22 1 AM 9	System User John Smith Andy Agent Steve Truit Stephen Truit John Smith John Smith John Smith John Smith John Smith John Smith John Smith John Smith John Smith	Pidgus	«Sign event create Invitation sent to site Invitation sent to site Invitation sent to site Invitation sent to site Consented to Dockin Receipt of any dis eSign event started Initial Discionare were started Document batch up Date: 2022-09-07 1 Authorization for the Approved electronic Borrower's Centifica Uniform Residentia Virginia Disclosure / Virginia Disclosure / Vi	uitt@docmagic.com uitt@docmagic.com #221@gmail.com) au #221@gmail.com agic eSign documes.untivite Ion resion 1 prepared on 5 load completed 1:30.05 Int.Sign Fax i Social Security Adm representation of sig representation of sig representation of sig representation of sig	sector days met September 07, 20 eceived for docus inistration to Reli- gnature d Consent signe- ned by JOHN SM Application signe n signed by JOH	ment. 5103643 () ease SSN Verification d by JOHN SMITH 10TH ed by JOHN SMITH N SMITH	in signed by John	s Smith			

The Action Log documents all the changes that occur.



lcons

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

eSign Console - S	Steve Truitt						Scheduler	Monitoring Ac	counts eSign Requests Create	Request Search 1 cou
Loan # 77709 Primary Name John 9 Type: Initial Package Id: 59017 Worksheet # 2906 (Closing Date 9/7/22	Smith Nisclosure		Lender:	Steve Truitt DSI TEST LENDE struitt@docmagic. (800)649-1362		ISALES)		Documents: Signers: Expires	In Progress (Active) 16 (72 total pages) 3 NIA (Requires: Primary) Y (Ink Sign)	
Details Documents	Documents Received	EMails Versio	ns							58888
articipants										Je -
NameEmail			Role	Created	Started	Consented	Viewed	Complete d		
John Smith strutt@docmagic.com			Borrower	9/7/22 11:04 AM	9/7/22 11:19 AM	9/7/22 11:19 AM	97			
Andy Agent struit@docmapic.com			Settlement Agent	9/7/22 11:04 AM			- 4	~	- 💴 📖	1 2
Stephen Truitt strutt221@gmail.com			Other	9/7/22 11:17 AM			_	-	😸 Sign Documen	•
ction Log										
ute	User	IP Address	Description							
/7/22 11:04 AM	System User		eSign event created							
(7/22 11:04 AM (7/22 11:04 AM	John Smith		Invitation sent to struitt(
17/22 11:04 AM	Andy Agent Steve Truitt		Invitation sent to struitt(Stephen Truitt (struitt22		and an Other					
/7/22 11:17 AM	Stephen Truitt		Invitation sent to struitt2		red as Other					
(7/22 11:19 AM	John Smith		Consented to DocMagie							_
/7/22 11:19 AM	John Smith		Receipt of early disclose		ess davs met					
/7/22 11:19 AM	John Smith		eSign event started		Constituted And Areas and Areas					_
/7/22 11:19 AM	John Smith		Initial Disclosure version	n 1 prepared on Se	ptember 07, 202	2, 11:04 AM PDT d	lisplayed			
(7/22 11/22 AM	Steve Truitt		Document batch upload	completed						
/7/22 11:30 AM	System User		Date: 2022-09-07 11:30	09 InkSign Fax rei	ceived for docum	nent: 5103643 ()				
/7/22 11:30 AM	John Smith		Authorization for the So	cial Security Admin	istration to Rele	ase SSN Verificatio	n signed by John Smil	h		
/7/22 11:31 AM	John Smith		Approved electronic rep	resentation of sign	ature					
/7/22 11:31 AM	John Smith		Approved electronic rep							
/7/22 11:31 AM	John Smith		Borrower's Certification							
/7/22 11:31 AM	John Smith		Uniform Residential Los							
(7/22 11:31 AM	John Smith		Virginia Disclosure of Te							
/7/22 11:31 AM	John Smith		IVES Request for Trans							
/7/22 11:31 AM	John Smith		Important Information A	bout Procedures Fo	or Opening A Ne	w Account signed b	y JOHN SMITH			
					DØLL	(

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



lcons

The printer opens your printing options.

										No. of Concession, Name	
eSign Console	- Steve Truitt						Scheduler	Monitoring Ac	counts eSign Requests	Create Request Search	Accou
Primary Name: Joh	alDisclosure 176 6 (Version : 1)			Steve Truitt DSI TEST LENDE struitt@docmagic (800)649-1362		ISALES)		Documents Signers Expires	In Progress (Active) 16 (72 total pages) 3 N/A (Requires: Primary Y {Ink Sign}		
Details Documen	ts Documents Received	EMails Versio	ns							9.8	A & 5
articipants											Vode -
Name/Email			Role	Created	Started	Consented	Viewed	Completed			
John Smith strutt@docmagic.com	e		Borower	9/7/22 11.04 AM	9/7/22 11.19 AM	9/7/22 11:19 AM	9/7				0
Andy Agent struit@docmapic.com			Settlement Agent	9/7/22 11:94 AM			4	~	\$	3	Ē
Stephen Truitt strutt221@gmail.com			Other	9/7/22 11:17 AM			_	_	s Str	n Documents	
tion Log te 7/22 11:04 AM	User System User	IP Address	Description eSign event created								
7/22 11:04 AM	John Smith		Invitation sent to struitt/3	Macmanic com							
			Invitation sent to struittig								
7/22 11:04 AM	Andy Agent										
	Andy Agent Steve Truitt			(@gmail.com) add	fed as Other						
7/22 11:17 AM	Andy Agent Steve Truitt Stephen Truitt		Stephen Truitt (struitt221 Invitation sent to struitt2		ied as Other						
7/22 11 17 AM 7/22 11 17 AM	Steve Truitt		Stephen Truitt (struitt221	21@gmail.com	ied as Other						
7/22 11 17 AM 7/22 11 17 AM 7/22 11 19 AM	Steve Truitt Stephen Truitt		Stephen Truitt (struitt221 Invitation sent to struitt2	21@gmail.com eSign							
7/22 11:17 AM 7/22 11:17 AM 7/22 11:19 AM 7/22 11:19 AM	Steve Truitt Stephen Truitt John Smith		Stephen Truitt (struitt221 Invitation sent to struitt22 Consented to DocMagic	21@gmail.com eSign							
7/22 11:17 AM 7/22 11:17 AM 7/22 11:19 AM 7/22 11:19 AM 7/22 11:19 AM 7/22 11:19 AM	Steve Truitt Stephen Truitt John Smith John Smith		Stephen Truitt (struitt22) Invitation sent to struitt2 Consented to DocMagic Receipt of carry disclosure	21@gmail.com eSign res.within 3 busics	esa days met	2. 11:04 AM PDT d	lisplayed		-		
77/22 11:17 AM 77/22 11:17 AM 77/22 11:19 AM 77/22 11:19 AM 77/22 11:19 AM 77/22 11:19 AM 77/22 11:22 AM	Steve Truitt Stephen Truitt John Smith John Smith John Smith		Stephen Truitt (struitt221 Invitation sent to struitt22 Consented to DocMagic Receipt of early disclose eSign event started Initial Disclosure version Document batch upload	21@gmail.com eSign reconciliant Double 1 prepared on Se completed	esa days mel ptember 07, 202		lisplayed		-		
7/22 11.17 AM 7/22 11.17 AM 7/22 11.19 AM 7/22 11.19 AM 7/22 11.19 AM 7/22 11.19 AM 7/22 11.19 AM 7/22 11.22 AM 7/22 11.30 AM	Steve Truitt Stephen Truitt John Smith John Smith John Smith John Smith Steve Truitt System User		Stephen Trutt (strutt221 Invitation sent to struitt22 Consented to DocMagic Receipt of early diodosu eSign event started Initial Disclosure version Document batch upload Date: 2022-09-07 11:30:	21@gmail.com eSign res.within 3 books 1 prepared on Se completed 09 InkSign Fax res	ess days met sptember 07, 202 ceived for docum	nent: 5103643 ()			-		
77/22 11.17 AM 77/22 11.17 AM 77/22 11.19 AM 77/22 11.19 AM 77/22 11.19 AM 77/22 11.19 AM 77/22 11.29 AM 77/22 11.20 AM 77/22 11.30 AM	Steve Truitt Stephen Truitt John Smith John Smith John Smith John Smith Steve Truitt System User John Smith		Stephen Truitt (struitt221 Invitation sent to struitt22 Consented to DocMagic Recept of early declose eSign event started Initial Disclosure version Document batch upload Date: 2022-09-07 11:30 Authorization for the Soc	21@gmail.com eSign res.within@bools 1 prepared on Se completed 09 InkSign Fax re- cial Security Admin	ess days met ptember 07, 202 ceived for docum sistration to Rele	nent: 5103643 ()		īth			
7/122 11:17 AM 7/122 11:17 AM 7/122 11:19 AM 7/122 11:19 AM 7/122 11:19 AM 7/122 11:19 AM 7/122 11:22 AM 7/122 11:30 AM 7/122 11:30 AM 7/122 11:31 AM	Steve Truitt Stephen Truitt John Smith John Smith John Smith Steve Truitt System User John Smith John Smith		Stephen Truitt (struitt221 Invitation sent to struitt22 Consented to DocMagic Rescript of early disclose eSign event started Initial Disclosure version Document batch upload Date: 2022-09-07 11:30 Authorization for the Soo Approved electronic rep	21@gmail.com eSign res.within@bools 1 prepared on Se completed 09 InkSign Fax re- cial Security Admin resentation of sign	ess days met ptember 07, 202 ceived for docum sistration to Rele usture	nent: 5103643 ()		Ť			
7722 11:17 AM 7722 11:17 AM 7722 11:19 AM 7722 11:19 AM 7722 11:19 AM 7722 11:19 AM 7722 11:29 AM 7722 11:20 AM 7722 11:30 AM 7722 11:31 AM 7722 11:31 AM	Stave Truitt Stephen Truitt John Smith John Smith John Smith Satew Truitt System User John Smith John Smith John Smith		Stephen Truitt (struit22 Invitation sent to struit22 Consented to DocMagic Receipt of early diadose eSign event started Initial Disclosure version Document batch upload Date: 2022-09-07 11:30 Authorization for the 50 Approved electronic rep Approved electronic rep	21@gmail.com eSign resultion 3 books 1 prepared on Se completed 09 InkSign Fax re- cial Security Admin resentation of sign resentation of sign	ess days met optember 07, 202 ceived for docum histration to Rele ature ature	eent. 5103643 () ase SSN Verificatio		th.			
7/22 11:17 AM 7/22 11:17 AM 7/22 11:19 AM 7/22 11:19 AM 7/22 11:19 AM 7/22 11:19 AM 7/22 11:29 AM 7/22 11:20 AM 7/22 11:30 AM 7/22 11:30 AM 7/22 11:31 AM 7/22 11:31 AM	Stave Trutt Stephen Trutt John Smith John Smith John Smith Stave Trutt Stave Trutt Stave Trutt John Smith John Smith John Smith John Smith		Stephen Truitt (struit22 Invitation sent to struit22 Consented to DocMagic Receipt of early disclose eSign event started Initial Discloser version Document batch: upload Date: 2022-09-07 11.30 Authorization for the Soc Approved electronic rep Borrown's Certification,	21@gmail.com eSign rec.vitilin 3 books 1 prepared on Se completed 09 InkSign Fax rei call Security Admin resentation of sign Authorization and	ess days met optember 07, 202 celved for docum istration to Rele ature ature (Consent signed	eent: 5103643 () ase SSN Verificatio by JOHN SMITH		ith.			
(1/22 11.17 AM (7/22 11.17 AM (7/22 11.19 AM (7/22 11.19 AM (7/22 11.19 AM (7/22 11.19 AM (7/22 11.29 AM (7/22 11.20 AM (7/22 11.30 AM (7/22 11.31 AM (7/22 11.31 AM (7/22 11.31 AM (7/22 11.31 AM	Steve Truit Stephen Truit Joha Smith Joha Smith John Smith John Smith Stystem User John Smith John Smith John Smith John Smith John Smith		Stephen Truitt (struit221 Invitation sent to struit22 Consented to DocMagic Receipt of early diodost eSign event started Initial Diccioser vension Document batch upload Date: 2022-09-07 11:30 Authorization for the Sod Approved electronic rep Borrower's Centification, Uniform Residential Loa	21@gmail.com eSign resventin 2 books 1 prepared on Se completed 05 InkSign Fax re- cial Security Admin resentation of sign resentation of sign authorization and an Application signe	ess days met optember 07, 202 celved for docum istration to Rele ature ature Consent signed ed by JOHN SM	eent: 5103643 () ase SSN Verificatio by JOHN SMITH TH	in signed by John Sm	ah.			
7/22 11:04 AM 7/22 11:17 AM 7/22 11:17 AM 7/22 11:19 AM 7/22 11:19 AM 7/22 11:19 AM 7/22 11:19 AM 7/22 11:30 AM 7/22 11:30 AM 7/22 11:31 AM 7/22 11:31 AM 7/22 11:31 AM 7/22 11:31 AM 7/22 11:31 AM 7/22 11:31 AM	Stave Trutt Stephen Trutt John Smith John Smith John Smith Steve Trutt System Uter John Smith John Smith John Smith John Smith John Smith John Smith		Stephen Trutt (strutt2): Imitation sent to strutt2: Constended to DocMagic Receipt of party disclose eSign event started Initial Disclosure version Document batch: upload Date: 2022-09-711:30 Authorization for the Soc Approved electronic rep Borrowar's Certification. Uniform Residential Loa Verginia Disclosure of Te	21@gmail.com eSign res.vibin 2 book 1 prepared on Se completed 09 InkSign Fax re- cial Security Admin resentation of sign resentation of sign resentation of sign Authorization and n Application signs rms of Mortgage A	ess days met optember 07, 202 ceived for docum istration to Rele ature ature Consent signed ed by JOHN SM upplication signe	tent: 5103643 () ase SSN Verificatio by JOHN SMITH TH d by JOHN SMITH	in signed by John Sm	ah.			
7/22 11.17 AM 7/22 11.17 AM 7/22 11.19 AM 7/22 11.19 AM 7/22 11.19 AM 7/22 11.19 AM 7/22 11.29 AM 7/22 11.20 AM 7/22 11.20 AM 7/22 11.31 AM 7/22 11.31 AM 7/22 11.31 AM 7/22 11.31 AM 7/22 11.31 AM 7/22 11.31 AM	Steve Trait Stephen Truitt John Smith John Smith John Smith John Smith Steve Truitt System User John Smith John Smith John Smith John Smith John Smith		Stephen Trutt (strutt22: Imitation sent to schultz) Constended to Dockfagic Riccapit of early diackas eSign event started Initial Disclosure version Document batth upload Date: 2022-09-07 11:30 Authorization for the 500 Approved electronic rep Approved electronic rep Borrows ¹ C certification. Uniform Residential Loss Virginia Disclosure of Te VIES Request for Trans-	21@gmail.com eSign 11 prepared on Se completed 05 inkSign Fax re- cial Security Admin resentation of sign Authorization algo m Application sign Application sign cript of Tax Return	ets days met sptember 07, 202 ceived for docum istration to Rele ature ature (Consent signed by JOHN SM upplication signe signed by JOHP	nent: 5103643 () ase SSN Verificatio by JOHN SMITH TH d by JOHN SMITH i SMITH	in signed by John Sm	1214			
(1/22 11.17 AM (7/22 11.17 AM (7/22 11.19 AM (7/22 11.19 AM (7/22 11.19 AM (7/22 11.19 AM (7/22 11.29 AM (7/22 11.20 AM (7/22 11.30 AM (7/22 11.31 AM (7/22 11.31 AM (7/22 11.31 AM (7/22 11.31 AM	Stave Trutt Stephen Trutt John Smith John Smith John Smith Steve Trutt System Uter John Smith John Smith John Smith John Smith John Smith John Smith		Stephen Trutt (strutt2): Imitation sent to strutt2: Constended to DocMagic Receipt of party disclose eSign event started Initial Disclosure version Document batch: upload Date: 2022-09-711:30 Authorization for the Soc Approved electronic rep Borrowar's Certification. Uniform Residential Loa Verginia Disclosure of Te	21@gmail.com eSign 11 prepared on Se completed 05 inkSign Fax re- cial Security Admin resentation of sign Authorization algo m Application sign Application sign cript of Tax Return	ets days met sptember 07, 202 ceived for docum istration to Rele ature ature (Consent signed by JOHN SM upplication signe signed by JOHP	nent: 5103643 () ase SSN Verificatio by JOHN SMITH TH d by JOHN SMITH i SMITH	in signed by John Sm	äh.			
17122 11:17 AM 17122 11:17 AM 17122 11:19 AM 17122 11:19 AM 17122 11:19 AM 17122 11:19 AM 17122 11:29 AM 17122 11:29 AM 17122 11:30 AM 17122 11:31 AM 17122 11:31 AM 17122 11:31 AM 17122 11:31 AM 17122 11:31 AM	Steve Trait Stephen Truitt John Smith John Smith John Smith John Smith Steve Truitt System User John Smith John Smith John Smith John Smith John Smith		Stephen Trutt (strutt22: Imitation sent to schultz) Constended to Dockfagic Riccapit of early diackas eSign event started Initial Disclosure version Document batth upload Date: 2022-09-07 11:30 Authorization for the 500 Approved electronic rep Approved electronic rep Borrows ¹ C certification. Uniform Residential Loss Virginia Disclosure of Te VIES Request for Trans-	21@gmail.com eSign 11 prepared on Se completed 05 inkSign Fax re- cial Security Admin resentation of sign Authorization algo m Application sign Application sign cript of Tax Return	ets days met sptember 07, 202 ceived for docum istration to Rele ature ature (Consent signed by JOHN SM upplication signe signed by JOHP	nent: 5103643 () ase SSN Verificatio by JOHN SMITH TH d by JOHN SMITH i SMITH	in signed by John Sm	0			

You can view the DocMagic eSign certificate by clicking here.



Certificate

The certificate mentioned previously downloads or opens as a PDF.

eSign Id: Documents Type:	590176 INITIAL DISCLOSURE	Reference Id: Loan Id:	2905 777090720220001	From: Documenta:	STEVE TRUITT 16	Status: Signature	in Progress as: Y
List of Signer	s						
Name/Email	Signature	Created D	ate Started Date	Consented	Date Viewed	Date	Completed Date
JOHN SMITH multiplicerape.rum	John Saidh	09/07/22 11:04:27 AM	09/07/22 11 19:40 AM	09/07/22 11:15:40 AM	09/07/22		09/07/22 11.31.52 AM
ANDY AGENT		09/07/22 11:04:25:464					
STEPHEN TRUITT		09/07/22 11:17:27 MA					
Audit Log							
Date/Time	Person		IP Address	Action			
09/07/22 11:04:27 AB	M SYSTEM USER		2214.4.200.000	e5gn even	et created		
09/07/22 11:04:27 AM	JOHN SMITH		10.1.138.24	Invitation a	ent to struitt@doom	agic.com	
09/07/22 11:04:28 AM	M ANDY AGENT		10.1.138.24	Invitation a	ent to struit@docm	agic.com	
09/07/22 11:17:26 Al	M STEVE TRUITT		10.1.10.201	Stephen Tr	uitt (struitt221@gm	ail.com) add	ed as Other
09/07/22 11:17:26 AM	M STEPHEN TRUE	TT .	10.1.10.201	Invitation a	ent to struitt221@gr	mail.com	
09/07/22 11:19:39 AM	M 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 wi	thin 3 busine	ns days met
09/07/22 11:19:41 AM	JOHN SMITH		10.1.10.201	e6ign even	t started		
09/07/22 11:19:41 Af	M JOHN SMITH		10.1.10.201		osure version 1 pre PDT displayed	pared on Se	ptember 07, 2022
	M STEVE TRUITT		10.1.138.22	Document	batch upload compl	cled	
09/07/22 11:22:34 AM					-09-07 11:30:09 ink	an 112 an 10	



lcons

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

		The second se
🖌 eSign Console - Steve Tru	uitt	Scheduler Monitoring Accounts eSign Requests Create Request Search 🛓 Account
Loan # 77709072022000 Primary Name: John Smith Type: InitialDisclosure Package Id 590176 Worksheet # 2906 (Version : 1) Closing Date: 9/7/22		Lender: Steve Truitt Si us In Progress (Active) DSI TEST (ENDER (SALES) (100SALES) Docum fs. 16 (72 total pages) shufl@documgic.com Sig. pr.s. 3 (800)649-1362 Exp. es. NIA (Requires: Primary) Signal es. Y (liek Sign)
Details Documents Docu	ments Received EMails Versions	688866
Participants		Kode - Off
# NameEmail		Role Created Started Consented Viewed Committee
1 John Smith strutt@docmagic.com		Bortuwer 9/7/22 9/7/22 9/7 11.94 AM 11.19 AM 11.19 AM 11
3 Andy Agent strutt@docmapic.com		Settement Agent 97722
4 Stephen Truitt struitt221@pmail.com		Other 9/7/22 11 17 AM w Sign Documents
Action Log Date User	<i>IP</i> Address	Description
9/7/22 11:04 AM Syste	em 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
		Stephen Truitt (struitt221@gmail.com) added as Other
		Invitation sent to struit221@gmail.com
		Consented to DocMagic eSign
laner/post/doite/conv	2202-222	Receipt of early disclosures within 3 bunkess days met
		eSign event started
		Initial Disclosure version 1 prepared on September 07, 2022, 11:04 AM PDT displayed Document batch upload completed
		Document batch uproad completed Date: 2022-09-07 11 30 09 InkSign Fax received for document: 5103643 ()
		Authorization for the Social Security Administration to Release SSN Verification signed by John Smith
		Patentialization for the occurrent patient measurements of reference our versional and reference of ourses. Approved feetornic representation of signature
		Approved electronic representation of signature
		Borrower's Certification, Authorization and Consent signed by JOHN SMITH
9/7/22 11:31 AM John		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.



Create Request

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

	- Steve Truitt						Schedu	ler Monitoring Ac	counts eSig	n Request: Create Requi	est Search LAccount
Loan # 777090720220001 Primary Nume: John Smith Type: InitiaDitaCoure Pactage Id: 590176 Worksheet # 2056 (Version: 1) Closing Date: 9/7/22		th DSITEST LENDER (SALES) (100SALES) dosure stutt@docmagic.com (000/64-1/522			SALES)		Documents: Signers: Expires:	In Progress 16 (72 total 3 N/A (Requir Y (Ink Sign)	pages) es. Primary)		
Details Docume	nts Documents Received	EMails Versions	E.								6888858
Participants											Preview Mode - O
# NameEmal			Role	Created	Started	Consented	Viewed	Completed	Declined	Links	
1 John Smith shutt@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	4506-C
3 Andy Agent shuiti@docmapic.com			Settlement Agent	9/7/22 11:04 AM						Send Email ap Agent Portal	G
4 Stephen Truitt struitt221@gmail.com			Other	9/7/22 11 17 AM						Send Email Sign Documents	
Date 9/7/22 11:04 AM	User System User	IP Address	Description eSign event created								
9/7/22 11:04 AM	System User		eSign event created								
9/7/22 11:04 AM	John Smith		Invitation sent to struitt@								
9/7/22 11:04 AM	Andy Agent		Invitation sent to struitt@								
9/7/22 11:17 AM	Steve Truitt		Stephen Truitt (struitt221		ed as Other						
9/7/22 11:17 AM 9/7/22 11:19 AM	Stephen Truitt John Smith		Invitation sent to struitt22								
9/7/22 11:19 AM	John Smith		Consented to DocMagic Receipt of early disclosure								
9/7/22 11:19 AM	John Smith		eSign event started		can ways men						
9/7/22 11:19 AM	John Smith		Initial Disclosure version	1 prepared on Sar	ptember 07, 202	2. 11:04 AM PDT d	isplayed				
	Steve Truitt		Document batch upload								
9/7/22 11:22 AM			Date: 2022-09-07 11:30.0		eived for docum	ent: 5103643 ()					
9/7/22 11:22 AM 9/7/22 11:30 AM	System User										
	System User John Smith		Authorization for the Soci	ial Security Admini	istration to Relev	ase SSN Verification	n signed by Johr	Smith			
9/7/22 11:30 AM			Authorization for the Soci Approved electronic repri			ase SSN Verification	n signed by Johr	Smith			
9/7/22 11:30 AM 9/7/22 11:30 AM	John Smith			esentation of sign	ature	ase SSN Verificatio	n signed by Johr	Smith			
9/7/22 11:30 AM 9/7/22 11:30 AM 9/7/22 11:31 AM	John Smith John Smith		Approved electronic repr	esentation of sign esentation of sign	ature ature		n signed by Johr	Smith			
9/7/22 11:30 AM 9/7/22 11:30 AM 9/7/22 11:31 AM 9/7/22 11:31 AM	John Smith John Smith John Smith		Approved electronic reprint Approved electronic reprint	esentation of sign esentation of sign Authorization and	ature ature Consent signed	by JOHN SMITH	n signed by Johr	Smith			
9/7/22 11:30 AM 9/7/22 11:30 AM 9/7/22 11:31 AM 9/7/22 11:31 AM 9/7/22 11:31 AM	John Smith John Smith John Smith John Smith		Approved electronic reprised electronic repris	esentation of sign esentation of sign Authorization and Application signe	ature ature Consent signed d by JOHN SMI	by JOHN SMITH TH	n signed by Johr	Smith			
9/7/22 11:30 AM 9/7/22 11:30 AM 9/7/22 11:31 AM 9/7/22 11:31 AM 9/7/22 11:31 AM 9/7/22 11:31 AM 9/7/22 11:31 AM 9/7/22 11:31 AM	John Smith John Smith John Smith John Smith John Smith John Smith John Smith		Approved electronic repri Approved electronic repri Borrower's Certification, A Uniform Residential Loan Virginia Disclosure of Ter IVES Request for Transco	esentation of sign esentation of sign Authorization and Application signe ms of Mortgage A ript of Tax Return	ature ature Consent signed d by JOHN SMI pplication signed signed by JOHN	by JOHN SMITH TH I by JOHN SMITH I SMITH		Smith			
9/7/22 11:30 AM 9/7/22 11:30 AM 9/7/22 11:31 AM 9/7/22 11:31 AM 9/7/22 11:31 AM 9/7/22 11:31 AM 9/7/22 11:31 AM 9/7/22 11:31 AM	John Smith John Smith John Smith John Smith John Smith John Smith		Approved electronic repri Approved electronic repri Borrower's Certification, J Uniform Residential Loan Virginia Disclosure of Ter	esentation of sign esentation of sign Authorization and Application signe ms of Mortgage A ript of Tax Return	ature ature Consent signed d by JOHN SMI pplication signed signed by JOHN	by JOHN SMITH TH I by JOHN SMITH I SMITH		Smith			
9/7/22 11:30 AM 9/7/22 11:30 AM 9/7/22 11:31 AM 9/7/22 11:31 AM 9/7/22 11:31 AM 9/7/22 11:31 AM 9/7/22 11:31 AM 9/7/22 11:31 AM	John Smith John Smith John Smith John Smith John Smith John Smith John Smith		Approved electronic repri Approved electronic repri Borrower's Certification, A Uniform Residential Loan Virginia Disclosure of Ter IVES Request for Transco	esentation of sign esentation of sign Authorization and Application signe ms of Mortgage A ript of Tax Return	ature ature Consent signed d by JOHN SMI pplication signed signed by JOHN	by JOHN SMITH TH I by JOHN SMITH I SMITH		Smith			

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

