

# eSign Console

# Getting Started

INFO@DOCMAGIC.COM | PHONE (800) 649-1362

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**Launch Center**

- eSign Console
- AutoPrep™
- DocMagic®
- DocMagic® One
- SmartCLOSE®
- LoanMagic® Console
- eVault
- SmartREGISTRY™

**My Documents**

- DOCUMENT FILES**  
Access and manage your loan document files
- FORM ANALYZER**  
Access our extensive forms library for document management
- STACKING ORDER**  
Modify the order of documents in your packages
- REPORT MANAGER**  
Generate reports: 1098, Closing, HMDA, and more
- LOAN DEFAULTS**  
Manage charges, fees, premiums, impounds, and more
- SAMPLE DOCUMENT REVIEW**  
Review and approve your sample documents

**Account Settings**

- USERS**  
Set up and manage user accounts and permissions
- PLAN MANAGER**  
Manage the loan programs for your account
- LENDER PROFILE**  
Manage your company and contact information

**Latest News**

- ▶ URLA: Updates, Improvements and Deadlines
- ▶ Getting Started with eClose
- ▶ Closing a Loan Electronically

- Access the DocMagic Dashboard and open the eSign Console from the top of the Launch Center.

# eSign Console

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

Company Logo

Active Requests Showing 1 - 50 of 52

1 2 Next Show: 50

Loan # Document Set	Signer Email	Status Worksheet #	Ver	Created	CS	IS	RESPA	PDF	Archive
esigntesting3 Loan Estimate Documents	Bob B Sample (+1) jessaca@sample.com	Signed JESSESIGTEST3	1	11/18/25 12:22 PM					
esigntesting2 Loan Estimate Documents	Bob B Sample (+1) jessaca@sample.com	Signed JESSESIGTEST2	4	11/18/25 12:16 PM					
esigntesting2 Initial Disclosure	Bob B Sample (+1) jessaca@sample.com	Signed JESSESIGTEST2	1	11/18/25 12:00 PM					
777110720250002 Initial Disclosure	John Smith (+1) aland@docmagic.com	Signed 4099	1	11/18/25 11:41 AM					
77711141258 Closing Documents	John Smith (+2) leah@docmagic.com	In Progress 4100	1	11/14/25 10:59 AM					
77711131425 Closing Documents	John Smith (+3) leah@docmagic.com	New	1	11/13/25 12:34 PM					
777101320250002 Closing Documents	John Smith (+2) aland@docmagic.com	Consented 4098	2	11/12/25 2:13 PM					
777110720250001 Initial Disclosure	John Smith (+1) aland@docmagic.com	Printed 4097	1	11/12/25 1:16 PM					
777110720250001 Closing Documents	John Smith (+1) aland@docmagic.com	New 4097	1	11/12/25 1:13 PM					
CONV Fixed Initials Sample.Copy Initial Disclosure	Kortney B Sample (+1) kharward@docmagic.com	Signed 4096	2	11/11/25 2:24 PM					
77711111321 Closing Documents	John Smith (+2) leah@docmagic.com	Signed 4093	1	11/11/25 11:21 AM					
77711101335 Closing Documents	John Smith (+2) leah@docmagic.com	New 4091	1	11/10/25 11:38 AM					
CONV Fixed Initials Sample Initial Disclosure	Bob B Sample (+1) mascencio@docmagic.com	In Progress 1709	8	11/7/25 1:16 PM					

- You'll start with the list of Active eSign Requests. Click on any to view details.
- The icons on the left indicate *Status* – how far along the eSign request is. You can also find the Status of a package in the third column.
- A star icon ★ indicates that the request is *New*. The document package has been created but no one has viewed their documents or began signing.
- A gear icon ⚙ indicates that the request is *In Progress*. Some users may have completed their signing portions while others have not started.

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Loan # Document Set	Signer Email	Status Worksheet #	Ver	Created	CS	IS	RESPA	PDF	Archive
esigntesting3 Loan Estimate Documents	Bob B Sample (+1) jessaca@sample.com	Signed JESSESIGNEST3	1	11/18/25 12:22 PM	✓				
esigntesting2 Loan Estimate Documents	Bob B Sample (+1) jessaca@sample.com	Signed JESSESIGNEST2	4	11/18/25 12:16 PM	✓				
esigntesting2 Initial Disclosure	Bob B Sample (+1) jessaca@sample.com	Signed JESSESIGNEST2	1	11/18/25 12:00 PM	✓				
777110720250002 Initial Disclosure	John Smith (+1) aland@docmagic.com	Signed 4099	1	11/18/25 11:41 AM	✓				
77711141258 Closing Documents	John Smith (+2) leah@docmagic.com	In Progress 4100	1	11/14/25 10:59 AM	✓				
77711131425 Closing Documents	John Smith (+3) leah@docmagic.com	New	1	11/13/25 12:34 PM	✓				
777101320250002 Closing Documents	John Smith (+2) aland@docmagic.com	Consented 4098	2	11/12/25 2:13 PM	✓				
777110720250001 Initial Disclosure	John Smith (+1) aland@docmagic.com	Printed 4097	1	11/12/25 1:16 PM	✓				
777110720250001 Closing Documents	John Smith (+1) aland@docmagic.com	New 4097	1	11/12/25 1:13 PM	✓				
CONV Fixed Initials Sample.Copy Initial Disclosure	Kortney B Sample (+1) kharward@docmagic.com	Signed 4096	2	11/11/25 2:24 PM	✓				
77711111321 Closing Documents	John Smith (+2) leah@docmagic.com	Signed 4093	1	11/11/25 11:21 AM	✓				
77711101335 Closing Documents	John Smith (+2) leah@docmagic.com	New 4091	1	11/10/25 11:38 AM	✓				
CONV Fixed Initials Sample Initial Disclosure	Bob B Sample (+1) mascencio@docmagic.com	In Progress 1709	8	11/7/25 1:16 PM	✓				

- The computer monitor with the check mark icon indicates that the participant(s) have *Consented* to the use of electronic signatures and eSign. 🖥️
- The page with a check mark icon indicates that the document package has been *Signed* – all necessary signatures have been collected, and the package is considered complete. 📄
- The green circle with a check mark icon indicates that the package has been *Printed* – a request, sometimes an automated one, has been to DocMagic's Print Fulfillment Center. 🟢

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esigntesting2 Loan Estimate Documents	Bob B Sample (+1) jessaca@sample.com	Signed JESSESIGNTTEST2	4	11/18/25 12:16 PM	✓		📄	📄	🔒
esigntesting2 Initial Disclosure	Bob B Sample (+1) jessaca@sample.com	Signed JESSESIGNTTEST2	1	11/18/25 12:00 PM	✓		📄	📄	🔒
777110720250002 Initial Disclosure	John Smith (+1) aland@docmagic.com	Signed 4099	1	11/18/25 11:41 AM	✓		📄	📄	🔒
77711141258 Closing Documents	John Smith (+2) leah@docmagic.com	In Progress 4100	1	11/14/25 10:59 AM	✓		⊖	📄	🔒
77711131425 Closing Documents	John Smith (+3) leah@docmagic.com	New	1	11/13/25 12:34 PM	✓		⊖	📄	🔒
777101320250002 Closing Documents	John Smith (+2) aland@docmagic.com	Consented 4098	2	11/12/25 2:13 PM	✓		⊖	📄	🔒
777110720250001 Initial Disclosure	John Smith (+1) aland@docmagic.com	Printed 4097	1	11/12/25 1:16 PM	✓		📄	📄	🔒
777110720250001 Closing Documents	John Smith (+1) aland@docmagic.com	New 4097	1	11/12/25 1:13 PM	✓		⊖	📄	🔒
CONV Fixed Initials Sample.Copy Initial Disclosure	Kortney B Sample (+1) kharward@docmagic.com	Signed 4096	2	11/11/25 2:24 PM	✓		📄	📄	🔒
77711111321 Closing Documents	John Smith (+2) leah@docmagic.com	Signed 4093	1	11/11/25 11:21 AM	✓		⊖	📄	🔒
77711101335 Closing Documents	John Smith (+2) leah@docmagic.com	New 4091	1	11/10/25 11:38 AM	✓		⊖	📄	🔒
CONV Fixed Initials Sample Initial Disclosure	Bob B Sample (+1) mascencio@docmagic.com	In Progress 1709	8	11/7/25 1:16 PM	✓		📄	📄	🔒
777110720250001 Closing Documents	John Smith (+2) aland@docmagic.com	New 4090	1	11/7/25 12:07 PM	✓		⊖	📄	🔒
777110620250001 Closing Documents	John Smith (+1) aland@docmagic.com	In Progress 4089	1	11/6/25 11:58 AM	✓		⊖	📄	🔒

- CS stands for Click Sign. All requests in the eSign Console will have this checked.
- If the package has an Ink Signed component included, then there will also be a corresponding check mark under IS.
- Click on the red and white icon to download a PDF copy of the package. 📄
- Click on the green and white page icon to download a csv of the eSign requests displayed. 📄
- Click on the lock icon to Archive the request. You can still find Archived requests with the Search function. 🔒

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esigntesting2 Loan Estimate Documents	Bob B Sample (+1) jessaca@sample.com	Signed JESSESIGNTTEST2	4	11/18/25 12:16 PM	✓		📄	📄	🗳️
esigntesting2 Initial Disclosure	Bob B Sample (+1) jessaca@sample.com	Signed JESSESIGNTTEST2	1	11/18/25 12:00 PM	✓		📄	📄	🗳️
777110720250002 Initial Disclosure	John Smith (+1) aland@docmagic.com	Signed 4099	1	11/18/25 11:41 AM	✓		📄	📄	🗳️
77711141258 Closing Documents	John Smith (+2) leah@docmagic.com	In Progress 4100	1	11/14/25 10:59 AM	✓		⊖	📄	🗳️
77711131425 Closing Documents	John Smith (+3) leah@docmagic.com	New	1	11/13/25 12:34 PM	✓		⊖	📄	🗳️
777101320250002 Closing Documents	John Smith (+2) aland@docmagic.com	Consented 4098	2	11/12/25 2:13 PM	✓		⊖	📄	🗳️
777110720250001 Initial Disclosure	John Smith (+1) aland@docmagic.com	Printed 4097	1	11/12/25 1:16 PM	✓		📄	📄	🗳️
777110720250001 Closing Documents	John Smith (+1) aland@docmagic.com	New 4097	1	11/12/25 1:13 PM	✓		⊖	📄	🗳️
CONV Fixed Initials Sample.Copy Initial Disclosure	Kortney B Sample (+1) kharward@docmagic.com	Signed 4096	2	11/11/25 2:24 PM	✓		📄	📄	🗳️
77711111321 Closing Documents	John Smith (+2) leah@docmagic.com	Signed 4093	1	11/11/25 11:21 AM	✓		⊖	📄	🗳️
77711101335 Closing Documents	John Smith (+2) leah@docmagic.com	New 4091	1	11/10/25 11:38 AM	✓		⊖	📄	🗳️
CONV Fixed Initials Sample Initial Disclosure	Bob B Sample (+1) mascencio@docmagic.com	In Progress 1709	8	11/7/25 1:16 PM	✓		📄	📄	🗳️
777110720250001 Closing Documents	John Smith (+2) aland@docmagic.com	New 4090	1	11/7/25 12:07 PM	✓		⊖	📄	🗳️
777110620250001 Closing Documents	John Smith (+1) aland@docmagic.com	In Progress 4089	1	11/6/25 11:58 AM	✓		⊖	📄	🗳️

- The RESPA section tells you the status of certain time sensitive packages (disclosures).
  - If the borrower views the electronic copy of the documentation within the time limits defined by TRID, then this requirement is fulfilled, and the Consented icon will be shown. 🗳️
  - If the borrower fails to view the documentation in time, *the request will automatically be sent to our Print Fulfillment center*, and the printer icon will be displayed. 🖨️
  - The grey icon indicates that the status is unknown or irrelevant. ⊖

# Key Information

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

Loan #: **777042920260001** Lender: **Alan Dai** Status: **New (Active)**  
Primary Name: **John Smith** DSI TEST LENDER (SALES) (100SALES) Documents: **27** (80 total pages)  
Type: **EClosing** aland@docmagic.com Signers: **3**  
Package Id: **1611159** (800)649-1362 Expires: **N/A** (Requires: Primary)  
Worksheet #: **4300** (Version : 1) Signatures: **Y**  
Closing Date: **4/29/26**

Details Documents Documents Received E-mails Versions

**Participants** [Preview Mode - Off](#)

#	Name/Email	Role	Created	Started	Consented	Viewed	Completed	Declined	Links
1	John Smith aland@docmagic.com	Borrower	4/29/26 10:12 AM						<a href="#">Send Email</a> <a href="#">Sign Documents</a>
3	Byron Oden aland@docmagic.com	Settlement Agent	4/29/26 10:12 AM						<a href="#">Send Email</a> <a href="#">Agent Portal</a>
4	Notary_name_placeholder -1 NOTARY_EMAIL_PLACEHOLDER-1	Notary	4/29/26 10:12 AM						<a href="#">Send Email</a>

**Action Log**

Date	User	IP Address	Description
4/29/26 10:12 AM	System User		eSign event created and expires on 04/29/2026
4/29/26 10:12 AM	John Smith		Invitation sent to aland@docmagic.com
4/29/26 10:12 AM	Byron Oden		Invitation sent to aland@docmagic.com

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- Click on any package to view details.
- The grey banner at the top of the page displays:
  - Left: Key loan information
  - Middle: Lender details
  - Right: Key document package information including status
- If you need to contact DocMagic's Customer Service department regarding an eSign package, please provide the Package ID and worksheet number.

# Details – Participants

eSign Console
Scheduler Monitoring Accounts eSign Requests Create Request Search Account

Loan #: 777042920260001	Lender: Alan Dai	Status: New (Active)
Primary Name: John Smith	DSI TEST LENDER (SALES) (100SALES)	Documents: 27 (80 total pages)
Type: EClosing	aland@docmagic.com	Signers: 3
Package Id: 1611159	(800)649-1362	Expires: N/A (Requires: Primary)
Worksheet #: 4300 (Version : 1)		Signatures: Y
Closing Date: 4/29/26		

Details
Documents
Documents Received
E-mails
Versions

Participants + ← Preview Mode - Off

#	Name/Email	Role	Created	Started	Consented	Viewed	Completed	Declined	Links
1	John Smith aland@docmagic.com	Borrower	4/29/26 10:12 AM						<a href="#">Send Email</a> <a href="#">Sign Documents</a>
3	Byron Oden aland@docmagic.com	Settlement Agent	4/29/26 10:12 AM						<a href="#">Send Email</a> <a href="#">Agent Portal</a>
4	Notary_name_placeholder -1 NOTARY_EMAIL_PLACEHOLDER-1	Notary	4/29/26 10:12 AM						<a href="#">Send Email</a>

**Action Log**

Date	User	IP Address	Description
4/29/26 10:12 AM	System User		eSign event created and expires on 04/29/2026
4/29/26 10:12 AM	John Smith		Invitation sent to aland@docmagic.com
4/29/26 10:12 AM	Byron Oden		Invitation sent to aland@docmagic.com

Add Internal Note

Cancel Request Delete Request

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- You'll start in the Details Tab when you open an eSign package in the Console. The Participants section is directly under the tabs.
- Participants will be created when you generate the document package. However, you may add additional participants in the Console by clicking on the green icon – please note that you may *not* add additional borrowers.
- You may see a Notary Name Placeholder for eClosing packages with an eNotary component – one placeholder per borrower until a notary is confirmed.

# Details – Participants

The screenshot displays the eSign Console interface. At the top, a green navigation bar contains the 'eSign Console' logo and several menu items: Scheduler, Monitoring, Accounts, eSign Requests, Create Request, Search, and Account. Below this, a grey header area provides loan details: Loan #: 777042920260001, Lender: Alan Dai (DSI TEST LENDER (SALES) (100SALES)), Status: New (Active), Documents: 27 (80 total pages), Signers: 3, Expires: N/A (Requires: Primary), and Y. The primary name is John Smith, type is EClosing, package ID is 1611159, worksheet # is 4300 (Version: 1), and closing date is 4/29/26. A central modal window titled 'Add Participant' is open, prompting for information for a new participant. The form fields are: First Name (TEST), Last Name (TEST), Email (test@docmagic.com), Access Code (1234), and Role (Settlement Agent). There are 'Add' and 'Cancel' buttons at the bottom of the modal. To the left of the modal, a 'Participants' table lists three entries: John Smith, Byron Oden, and a notary placeholder. Below that is an 'Action Log' table with three entries from 4/29/26 10:12 AM. To the right of the modal, there are icons for document actions and a 'Declined Links' section with 'Send Email' and 'Sign Documents' options. At the bottom of the page, there is a copyright notice for DocMagic, Inc. and a footer with links for Home, Contact, Privacy Policy, and Terms of Use.

- If you are adding a participant, please fill out all fields and select a Role. Any relevant communication will be done via email, and any access (to eSign documents or witness a Remote Online Notary session) will be granted through the access code assigned in this screen.
- Your new entry will end up at the bottom of the Participant stack.

# Details – Participants

The screenshot displays the eSign Console interface. At the top, there is a navigation bar with options like Scheduler, Monitoring, Accounts, eSign Requests, Create Request, Search, and Account. Below this, a header section provides loan details: Loan # 777042920260001, Lender Alan Dai (DSI TEST LENDER (SALES) (100SALES)), Status New (Active), Documents 27 (80 total pages), 3, N/A (Requires: Primary), and Y. A 'Participant Details' modal window is open in the center, allowing users to view, edit, or delete participant information. The modal fields include: First Name: TEST, Last Name: TEST, Email: test@docmagic.com, Phone Number: ( ) - , Access Code: 1234, and Role: Other. Buttons for Cancel, Delete, and Save are at the bottom of the modal. The background interface shows a list of participants under the 'Participants' tab, including John Smith (aland@docmagic.com), Byron Oden (aland@docmagic.com), and a Notary placeholder. An 'Action Log' table shows system and user actions on 4/29/26. At the bottom, there is a footer with copyright information and links for Home, Contact, Privacy Policy, and Terms of Use.

- Click on a participant's name to view their details, as pictured. You may edit their email, phone number and access code.
- You may also remove participants by clicking Delete (will be greyed out for borrowers).

# Details – Participants

The screenshot displays the eSign Console interface. At the top, there is a navigation bar with the eSign Console logo and several menu items: Scheduler, Monitoring, Accounts, eSign Requests, Create Request, Search, and Account. Below the navigation bar, a summary box contains loan information: Loan # 777042920260001, Lender Alan Dai, Status New (Active), Primary Name John Smith, Type EClosing, Package Id 1611159, Worksheet # 4300 (Version : 1), Closing Date 4/29/26, and Documents 27 (80 total pages). Below the summary box, there are tabs for Details, Documents, Documents Received, EMails, and Versions. A blue arrow points from the 'Created' column in the Participants table to the 'Created' field in the summary box. The Participants table lists three participants: John Smith (Borrower), Byron Oden (Settlement Agent), and Notary\_name\_placeholder -1 (Notary). Below the table is an Action Log section with a table of actions and an 'Add Internal Note' button. At the bottom right, there are 'Cancel Request' and 'Delete Request' buttons.

Loan #: 777042920260001      Lender: Alan Dai      Status: **New** (Active)

Primary Name: John Smith      DSI TEST LENDER (SALES) (100SALES)      Documents: 27 (80 total pages)

Type: EClosing      aland@docmagic.com      Signers: 3

Package Id: 1611159      (800)649-1362      Expires: N/A (Requires: Primary)

Worksheet #: 4300 (Version : 1)      Signatures: Y

Closing Date: 4/29/26

Details Documents Documents Received EMails Versions

**Participants** [Preview Mode - Off](#)

#	Name/Email	Role	Created	Started	Consented	Viewed	Completed	Declined	Links
1	John Smith aland@docmagic.com	Borrower	4/29/26 10:12 AM						Send Email Sign Documents
3	Byron Oden aland@docmagic.com	Settlement Agent	4/29/26 10:12 AM						Send Email Agent Portal
4	Notary_name_placeholder -1 NOTARY_EMAIL_PLACEHOLDER-1	Notary	4/29/26 10:12 AM						Send Email

**Action Log**

Date	User	IP Address	Description
4/29/26 10:12 AM	System User		eSign event created and expires on 04/29/2026
4/29/26 10:12 AM	John Smith		Invitation sent to aland@docmagic.com
4/29/26 10:12 AM	Byron Oden		Invitation sent to aland@docmagic.com

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- The eSign Console allows you to track progress for each participant.
- Created refers to the moment that the participant was created. All participants generated with the creation of the package will have the same created timestamp as the package itself.

# Details – Participants

eSign Console Scheduler Monitoring Accounts eSign Requests Create Request Search Account

Loan #: 777042920260001 Lender: Alan Dai Status: New (Active)  
 Primary Name: John Smith DSI TEST LENDER (SALES) (100SALES) Documents: 27 (80 total pages)  
 Type: EClosing aland@docmagic.com Signers: 3  
 Package Id: 1611159 (800)649-1362 Expires: N/A (Requires: Primary)  
 Worksheet #: 4300 (Version : 1) Signatures: Y  
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Details Documents Documents Received EMails Versions

Participants [Preview Mode - Off](#)

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4/29/26 10:12 AM	John Smith		Invitation sent to aland@docmagic.com
4/29/26 10:12 AM	Byron Oden		Invitation sent to aland@docmagic.com

Add Internal Note

Cancel Request Delete Request

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- Started refers to the moment a participant began their workflow (usually triggers at the same time as "Viewed").
- Consented refers to the moment a signer agreed to DocMagic's eSign Disclosure and Consent form, which must be given before documents can be accessed. If a participant gave consent during their Initial Disclosures, this consent would carry over to their Closing Package.
- Viewed refers to the moment a participant viewed their documents.
- These three events will often share the same timestamp.

# Details – Participants

eSign Console Scheduler Monitoring Accounts eSign Requests Create Request Search Account

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 Primary Name: John Smith DSI TEST LENDER (SALES) (100SALES) Documents: 27 (80 total pages)  
 Type: EClosing aland@docmagic.com Signers: 3  
 Package Id: 1611159 (800)649-1362 Expires: N/A (Requires: Primary)  
 Worksheet #: 4300 (Version : 1) Signatures: Y  
 Closing Date: 4/29/26

Details Documents Documents Received EMails Versions

Participants [Preview Mode - Off](#)

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3	Byron Oden aland@docmagic.com	Settlement Agent	4/29/26 10:12 AM						Send Email Agent Portal
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Date	User	IP Address	Description
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4/29/26 10:12 AM	Byron Oden		Invitation sent to aland@docmagic.com

Add Internal Note

Cancel Request Delete Request

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- Completed refers to the moment a signer completed their eSign workflow (all signatures collected).
- Declined refers to the moment a signer withdrew their consent from the eSign room. They will be unable to view or sign their documents electronically and will receive a copy in the mail.

# Details – Participants

eSign Console Scheduler Monitoring Accounts eSign Requests Create Request Search Account

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Details Documents Documents Received E-mails Versions Preview Mode - Off

### Participants

#	Name/Email	Role	Created	Started	Consented	Viewed	Completed	Declined	Links
1	John Smith aland@docmagic.com	Borrower	4/29/26 10:12 AM						Send Email Sign Documents
3	Byron Oden aland@docmagic.com	Settlement Agent	4/29/26 10:12 AM						Send Email Agent Portal
4	Notary_name_placeholder -1 NOTARY_EMAIL_PLACEHOLDER-1	Notary	4/29/26 10:12 AM						Send Email

### Action Log

Date	User	IP Address	Description
4/29/26 10:12 AM	System User		eSign event created and expires on 04/29/2026
4/29/26 10:12 AM	John Smith		Invitation sent to aland@docmagic.com
4/29/26 10:12 AM	Byron Oden		Invitation sent to aland@docmagic.com

Add Internal Note

Cancel Request Delete Request







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- Resend the corresponding invitation email to “remind” a participant to access their eSign documents or eClose Console in the case of the Settlement Agent by clicking Send Email under Links on the right.
- Sign Documents allows you to open that Participant’s signing experience in another tab – this assumes that the Participant is with you.
- If there is a Settlement Agent involved, you may also enter their portal from here.
- Notary Name Placeholders will be present for eClosing packages with an eNotary component. You will see one placeholder per borrower until a notary is confirmed.







# Details – Icons

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

Loan #: 777050620260008 Lender: Alan Dai Status: Printed (Active)  
 Primary Name: John Smith Documents: 22 (80 total pages)  
 Type: InitialDisclosure Signers: 3  
 Package Id: 1620511 Expires: 5/7/26, 10:18 PM (Requires: Primary)  
 Worksheet #: 4324 (Version : 1) Signatures: Y  
 Closing Date: 5/11/26

Details Documents Documents Received E-mails Versions      

**Participants**  Preview Mode - Off



#	Name/Email	Role	Created	Started	Consented	Viewed	Completed	Declined	Links
1	John Smith aland@docmagic.com	Borrower	5/6/26 4:18 PM						 Send Email  Sign Documents
2	Sandy Smith aland@docmagic.com	Borrower	5/6/26 4:18 PM						 Send Email  Sign Documents
4	Byron Oden acarlson@docmagic.com	Settlement Agent	5/6/26 4:18 PM						 Send Email  Agent Portal

**Action Log**

Date	User	IP Address	Description
5/6/26 4:18 PM	System User		eSign event created
5/6/26 4:18 PM	John Smith		Invitation sent to aland@docmagic.com
5/6/26 4:18 PM	Sandy Smith		Invitation sent to aland@docmagic.com
5/6/26 4:18 PM	Byron Oden		Invitation sent to acarlson@docmagic.com
5/6/26 4:28 PM	Alan Dai		Alan Dai requested a paper copy of the documents

**Print Copy Transaction Log**


Version	Requested	DSI Printed	DSI Mailed	Requester	Transaction ID
1	5/6/26, 4:28:46 PM PDT			Alan Dai	470494


- You will find six additional icons towards the top right of the Console.
  -  The Print/Mail icon sends a request to our Print Fulfillment Center for a paper copy of the document package to be printed and mailed to the borrower(s). An entry will be recorded in the Action Log, and in the Print Copy Transaction Log that appears below when you make the request.
  -  The PDF icon allows you to download a PDF of the entire document stack with all signatures that have been collected at the time of the request.

# Details – Icons

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

Loan #: 777050620260008 Lender: Alan Dai Status: Printed (Active)  
 Primary Name: John Smith DSI TEST LENDER (SALES) (100SALES) Documents: 22 (80 total pages)  
 Type: InitialDisclosure aland@docmagic.com Signers: 3  
 Package Id: 1620511 (800)649-1362 Expires: 5/7/26, 10:18 PM (Requires: Primary)  
 Worksheet #: 4324 (Version : 1) Signatures: Y  
 Closing Date: 5/11/26

Details Documents Documents Received EMails Versions 

**Participants**  Preview Mode - Off

#	Name/Email	Role	Created	Started	Consented	Viewed	Completed	Declined	Links
1	John Smith aland@docmagic.com	Borrower	5/6/26 4:18 PM						Send Email Sign Documents
2	Sandy Smith aland@docmagic.com	Borrower	5/6/26 4:18 PM						Send Email Sign Documents
4	Byron Oden acarlson@docmagic.com	Settlement Agent	5/6/26 4:18 PM						Send Email Agent Portal


**Action Log**




Date	User	IP Address	Description
5/6/26 4:18 PM	System User		eSign event created
5/6/26 4:18 PM	John Smith		Invitation sent to aland@docmagic.com
5/6/26 4:18 PM	Sandy Smith		Invitation sent to aland@docmagic.com
5/6/26 4:18 PM	Byron Oden		Invitation sent to acarlson@docmagic.com
5/6/26 4:28 PM	Alan Dai		Alan Dai requested a paper copy of the documents

**Print Copy Transaction Log**

Version	Requested	DSI Printed	DSI Mailed	Requester	Transaction ID
1	5/6/26, 4:28:46 PM PDT			Alan Dai	470494

Add Internal Note

Cancel Request Delete Request 

-  Click on the ribbon icon to view the eSign Certificate.
-  The printer icon allows you to print a summary of the eSign Console on a local printer – it does not print the documents nor send a request to our fulfillment center.
-  The lock icon allows you to archive the package. You can still find the package using the search function.
- Finally, you can cancel an eSign request or permanently delete one from the bottom right.

# Details – Preview Mode

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

Loan #: 777042920260004 Lender: Alan Dai Status: New (Active)  
 Primary Name: John Smith DSI TEST LENDER (SALES) (100SALES) Documents: 27 (80 total pages)  
 Type: EClosing aland@docmagic.com Signers: 3  
 Package Id: 1611531 (800)649-1362 Expires: N/A (Requires: Primary)  
 Worksheet #: 4304 (Version : 1) Signatures: Y  
 Closing Date: 4/30/26

Details Documents Documents Received EMails Versions

Participants [Preview Mode - On](#)

#	Name/Email	Role	Created	Started	Consented	Viewed	Completed	Declined	Links
1	John Smith aland@docmagic.com	Borrower	4/29/26 3:40 PM						<a href="#">Send Email</a> <a href="#">Preview Documents</a>
3	Byron Oden aland@docmagic.com	Settlement Agent	4/29/26 3:40 PM						<a href="#">Send Email</a> <a href="#">Agent Portal</a>
4	Notary_name_placeholder -1 NOTARY_EMAIL_PLACEHOLDER-1	Notary	4/29/26 3:40 PM						<a href="#">Send Email</a>

Action Log

Date	User	IP Address	Description
4/29/26 3:40 PM	System User		eSign event created and expires on 04/30/2026
4/29/26 3:40 PM	System User		Preview Mode enabled until 04/30/2026
4/29/26 3:40 PM	John Smith		Invitation sent to aland@docmagic.com
4/29/26 3:40 PM	Byron Oden		Invitation sent to aland@docmagic.com

Add Internal Note

Cancel Request Delete Request

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- Preview Mode allows borrowers to view their Closing Packages before they can sign – “Preview Mode – On”.
- You may need to reach out to DocMagic support to enable Preview Mode – it may not be switched on by default.
- Please note that other participants such as the Settlement Agent may still sign when Preview Mode is on.
- Preview Mode will automatically turn off at midnight Hawaii time on the day closing (6am ET). Borrowers will get an email containing a link that allows them to sign all their closing documents that do not need to be signed in the presence of a notary.

# Details – Preview Mode

**Preview Mode**

Preview Mode:  On

Preview Mode Disabled On:

**Loan #:** 777042920260004  
**Primary Name:** John Smith  
**Type:** EClosing  
**Package Id:** 1611531  
**Worksheet #:** 4304 (Version : 1)  
**Closing Date:** 4/30/26

**Participants**

#	Name/Email	Role	Created	Started	Consented	Viewed	Completed	Declined	Links
1	John Smith aland@docmagic.com	Borrower	4/29/26 3:40 PM						<a href="#">Send Email</a> <a href="#">Preview Documents</a>
3	Byron Oden aland@docmagic.com	Settlement Agent	4/29/26 3:40 PM						<a href="#">Send Email</a> <a href="#">Agent Portal</a>
4	Notary_name_placeholder -1 NOTARY_EMAIL_PLACEHOLDER-1	Notary	4/29/26 3:40 PM						<a href="#">Send Email</a>

**Action Log**

Date	User	IP Address	Description
4/29/26 3:40 PM	System User		eSign event created and expires on 04/30/2026
4/29/26 3:40 PM	System User		Preview Mode enabled until 04/30/2026
4/29/26 3:40 PM	John Smith		Invitation sent to aland@docmagic.com
4/29/26 3:40 PM	Byron Oden		Invitation sent to aland@docmagic.com

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- You can also manually turn off Preview Mode by clicking on it and toggling the On/Off switch.
- By default, the Settlement Agent and Notary may also toggle Preview Mode. Please reach out to support to disable this privilege.

# Details – Action Log

Loan #: <b>777042920260005</b>	Lender: <b>Alan Dai</b>	Status: <b>Printed (Active)</b>
Primary Name: <b>John Smith</b>	DSI TEST LENDER (SALES) (100SALES)	Documents: <b>17 (67 total pages)</b>
Type: <b>InitialDisclosure</b>	aland@docmagic.com	Signers: <b>2</b>
Package Id: <b>1611534</b>	(800)649-1362	Expires: <b>4/29/26, 3:52 PM (Requires: Primary)</b>
Worksheet #: <b>4305 (Version : 1)</b>		Signatures: <b>Y</b>
Closing Date: <b>4/30/26</b>		

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### Participants

#	Name/Email	Role	Created	Started	Consented	Viewed	Completed	Declined	Links
1	John Smith aland@docmagic.com	Borrower	4/29/26 3:52 PM						<a href="#">Send Email</a> <a href="#">Sign Documents</a>
3	Byron Oden aland@docmagic.com	Settlement Agent	4/29/26 3:52 PM						<a href="#">Send Email</a> <a href="#">Agent Portal</a>

[Preview Mode - Off](#)

### Action Log

Date	User	IP Address	Description
4/29/26 3:52 PM	System User		eSign event created
4/29/26 3:52 PM	John Smith		Invitation sent to aland@docmagic.com
4/29/26 3:52 PM	System User		eSign event expired
4/29/26 3:52 PM	Byron Oden		Invitation sent to aland@docmagic.com
4/29/26 3:54 PM	System User		Manually Added Entry

### Print Copy Transaction Log

Version	Requested	DSI Printed	DSI Mailed	Requester	Transaction ID
1	4/29/26, 3:52:51 PM PDT			System User	469413

[Click here to manually add an entry to the Action Log!](#)

- The Action Log at the bottom creates a record for every event in this document package. You can manually add entries at the bottom.
- If you are about to hit a 3-business day TRID rule with regards to delivering a document package to a borrower on time, our system will automatically cancel the eSign request and send the document package to our print fulfillment center.
- The Action Log will state that the action was performed by "System User", but no person is triggering this event – it is fully automated. Note the Print Copy Transaction Log – this will appear when a Print Fulfillment request is made or triggered.

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# Documents

eSign Console - Alan Dai

Scheduler Monitoring Accounts eSign Requests Create Request Search Account

Return to Search

Loan #: 61604150004 Lender: Andrea Carlson Status: Signed (Active)  
 Primary Name: Jane Smith DSI TEST LENDER (SALES) (100SALES) Documents: 29 (85 total pages)  
 Type: EClosing acarlson@docmagic.com Signers: 2  
 Package Id: 1620364 8006491362 Expires: N/A (Requires: Primary)  
 Worksheet #: 4318 (Version : 1) Signatures: Y (Ink Sign)  
 Closing Date: 5/6/26

Details Documents Documents Received EMails Versions

Documents

Document Name	ClickSign	Page(s)	Mark(s)	Signer(s)	Completed	Sigreq Document Id   Document Id	Filename	Delete	Operation
1 Multistate Fixed Rate Note		4/4	1	1	✓	9735805   9758209	us3200.not.xml		
2 New Jersey Addendum to Residential Mortgage Loan Application	✓	1	4	1	✓	9735806   9758210	njarmla.msc.xml		
3 Uniform Residential Loan Application	✓	9	8	1	✓	9735807   9758211	1003.ltr.xml		
4 New Jersey Mortgage (MERS)		19/19	1	1	✓	9735808   9758212	nj3031.mzm.xml		
5 General Closing Instructions	✓	2	2	1	✓	9735809   9758213	gci.msc.xml		
6 Specific Closing Instructions	✓	4	6	2	✓	9735810   9758214	sci.msc.xml		
7 Borrower's Certification, Authorization and Consent	✓	2	1	1	✓	9735811   9758215	bcac.msc.xml		
8 Certificate of Loans to One Borrower	✓	2	14	1	✓	9735812   9758216	collob.msc.xml		
9 Hazard Insurance Authorization and Requirements	✓	2	1	1	✓	9735813   9758217	hazard8.lsr.xml		
10 IVES Request for Transcript of Tax Return	✓	2	3	1	✓	9735814   9758218	4506c.msc-alt.xml		
11 W9 - Payers Request for Taxpayer ID	✓	6	1	1	✓	9735815   9758219	w9.msc.xml		
12 Acknowledgment of Receipt of Appraisal Report	✓	1	1	1	✓	9735816   9758220	arar2.msc.xml		
13 Closing Disclosure	✓	5	1	1	✓	9735817   9758221	cd.dsc.xml		
14 Compliance Agreement		2/2	1	1	✓	9735818   9758222	comp.lsr.xml		
15 Customer Identification Verification	✓	2	0	0	✓	9735819   9758223	civ.msc.xml		
16 Federal Equal Credit Opportunity Act Notice (ECOA)	✓	1	1	1	✓	9735820   9758224	ecoa.lsr.xml		
17 Hardship Letter	✓	1	1	1	✓	9735821   9758225	h.lsr.xml		
18 Impound Authorization	✓	2	3	1	✓	9735822   9758226	ia.msc.xml		

- The Documents Tab displays a breakdown of the individual documents that are to be signed as part of the document package.
- Click on any document name to download a PDF copy of the document.
- A lack of green check mark under the Click Sign column indicates that the document will need to be ink signed. You will see these for Hybrid eClose packages.
- A green check mark under the Completed column indicates that all signatures have been collected for that document.

# Documents

Loan #: <b>777042920260004</b>	Lender: <b>Alan Dai</b>	Status: <b>New (Active)</b>
Primary Name: <b>John Smith</b>	DSI TEST LENDER (SALES) (100SALES)	Documents: <b>27</b> (80 total pages)
Type: <b>EClosing</b>	aland@docmagic.com	Signers: <b>3</b>
Package Id: <b>1611531</b>	(800)649-1362	Expires: <b>N/A</b> (Requires: Primary)
Worksheet #: <b>4304</b> (Version : 1)		Signatures: <b>Y</b>
Closing Date: <b>4/30/26</b>		

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Documents
+
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Document Name	ClickSign	Page(s)	Mark(s)	Signer(s)	Completed	Sigreq	Document Id   Document Id	Filename	Delete	Operation
1 Multistate Fixed Rate Electronic Note	✓	4	1	1			9707329   9729507	us3200.not-sd.ftl		
2 New Jersey Addendum to Residential Mortgage Loan Application	✓	1	4	1			9707330   9729508	njarmla.msc.xml		
3 Uniform Residential Loan Application	✓	8	7	1			9707331   9729509	1003.ltr.xml		
4		10		2			9707332   9729510	nj3031.mzm.xml		
5		2		1			9707333   9729511	gci.msc.xml		
6		6		2			9707334   9729512	sci.msc.xml		
7		1		1			9707335   9729513	bcac.msc.xml		
8		14		1			9707336   9729514	coltob.msc.xml		
9		1		1			9707337   9729515	hazard8.lsr.xml		
10		3		1			9707338   9729516	4506c.msc-alt.xml		
11		1		1			9707339   9729517	w9.msc.xml		
12 Acknowledgment of Receipt of Appraisal Report	✓	1	1	1			9707340   9729518	arar2.msc.xml		
13 Closing Disclosure	✓	5	1	1			9707341   9729519	cd.dsc.xml		
14 Compliance Agreement	✓	2	10	2			9707342   9729520	comp.lsr.xml		
15 Customer Identification Verification	✓	2	73	1			9707343   9729521	civ.msc-notary.xml		
16 Federal Equal Credit Opportunity Act Notice (ECOA)	✓	1	1	1			9707344   9729522	ecoa.lsr.xml		
17 Impound Authorization	✓	2	3	1			9707345   9729523	ia.msc.xml		
18 Initial Escrow Account Disclosure Statement	✓	2	1	1			9707346   9729524	ieads.msc.xml		
19 New Jersey Choice of Insurance Notice	✓	1	1	1			9707347   9729525	njcoin.msc.xml		
20 New Jersey Initial Tax Authorization Notice	✓	1	0	0	✓		9707348   9729526	njitan.msc.xml		

- The Plus icon allows you to add documents to packages post generation.
- Click Browse to select a document from your computer and then click the blue Submit button. This will upload your document and activate [AutoPrep](#) – our proprietary auto-tagging tool.

# Documents

Loan #: <b>777042920260004</b>	Lender: <b>Alan Dai</b>	Status: <b>New (Active)</b>
Primary Name: <b>John Smith</b>	DSI TEST LENDER (SALES) (100SALES)	Documents: <b>27</b> (80 total pages)
Type: <b>EClosing</b>	aland@docmagic.com	Signers: <b>3</b>
Package Id: <b>1611531</b>	(800)649-1362	Expires: <b>N/A</b> (Requires: Primary)
Worksheet #: <b>4304</b> (Version : 1)		Signatures: <b>Y</b>
Closing Date: <b>4/30/26</b>		

[Details](#) | [Documents](#) | [Documents Received](#) | [EMails](#) | [Versions](#)

### Documents +

Document Name	ClickSign	Page(s)	Mark(s)	Signer(s)	Completed	Sigreq	Document Id   Document Id	Filename	Delete	Operation
1 Multistate Fixed Rate Electronic Note	✓	4	1	1			9707329   9729507	us3200.not-sd.ftl		
2 New Jersey Addendum to Residential Mortgage Loan Application	✓	1	4	1			9707330   9729508	njarmla.msc.xml		
3 Uniform Residential Loan Application	✓	8	7	1			9707331   9729509	1003.ltr.xml		
4 New Jersey Mortgage (MERS)	✓	18	10	2			9707332   9729510	nj3031.mzm.xml		
5 General Closing Instructions	✓	2	2	1			9707333   9729511	gci.msc.xml		
6 Specific Closing Instructions	✓	4	6	2			9707334   9729512	sci.msc.xml		
7 Borrower's Certification, Authorization and Consent	✓	2	1	1			9707335   9729513	bcac.msc.xml		
8 Certificate of Loans to One Borrower	✓	2	14	1			9707336   9729514	coltob.msc.xml		
9 Hazard Insurance Authorization and Requirements	✓	2	1	1			9707337   9729515	hazard8.lsr.xml		
10 IVES Request for Transcript of Tax Return	✓	2	3	1			9707338   9729516	4506c.msc-alt.xml		
11 W9 - Payers Request for Taxpayer ID	✓	6	1	1			9707339   9729517	w9.msc.xml		
12 Acknowledgment of Receipt of Appraisal Report	✓	1	1	1			9707340   9729518	arar2.msc.xml		
13 Closing Disclosure	✓	5	1	1			9707341   9729519	cd.dsc.xml		
14 Compliance Agreement	✓	2	10	2			9707342   9729520	comp.lsr.xml		
15 Customer Identification Verification	✓	2	73	1			9707343   9729521	civ.msc-notary.xml		
16 Federal Equal Credit Opportunity Act Notice (ECOA)	✓	1	1	1			9707344   9729522	ecoa.lsr.xml		
17 Impound Authorization	✓	2	3	1			9707345   9729523	ia.msc.xml		
18 Initial Escrow Account Disclosure Statement	✓	2	1	1			9707346   9729524	ieads.msc.xml		
30 1JohnSandySmith_Title_Docs	✓				21	6	3			

- After completing the AutoPrep workflow, return to the eSign Console and refresh the page.
- Click on the Documents Tab and your newly added document will be on the bottom.
- You can also remove this document if you want by clicking on the Trash icon to the far right.

# Documents

Loan #: 777042920260004 Lender: Alan Dai Status: New (Active)

Primary Name: John Smith  
Type: EClosing  
Package Id: 1611531  
Worksheet #: 4304 (Version :  
Closing Date: 4/30/26

Multistate Fixed Rate Electronic Note  
Prepare documents for signing. Done

75%

Multistate Fixed Rate Electronic Note

MIN: 999935323202600010 Loan Number: 777042920260004

**NOTE**  
(For Electronic Signature)

April 15, 2026 CITY CALIFORNIA  
(Date) (City) (State)

7755 JOHN Q HAMMONS DR. FRISCO, NJ 75034  
(Property Address)

- BORROWER'S PROMISE TO PAY**  
In return for a loan in the amount of U.S. \$ 145,000.00 (the "Principal") that I have received from DSI TEST LENDER (SALES), A CALIFORNIA CORPORATION (the "Lender"), I promise to pay the Principal, plus interest, to the order of the Lender. I will make all payments under this Note in U.S. currency in the form of cash, check, money order, or other payment method accepted by Lender.  
I understand that the Lender may transfer this Note. The Lender or anyone who takes this Note by transfer and who is entitled to receive payments under this Note is called the "Note Holder."
- INTEREST**  
Interest will be charged on unpaid Principal until the full amount of the Principal has been paid. I will pay interest at a yearly rate of 5.250 %.  
The interest rate required by this Section 2 is the rate I will pay both before and after any default described in Section 6(B) of this Note.
- PAYMENTS**  
(A) **Time and Place of Payments**  
I will pay principal and interest by making a payment every month. This amount is called my "Monthly Payment."  
I will make my Monthly Payment on the 1st day of each month beginning on June 01, 2026. I will make these payments every month until I have paid all of the Principal and interest and any other charges described below that I may owe under this Note. Each Monthly Payment will be applied as of its scheduled due date and will be applied to interest before the Principal. If, on May 01, 2056, I still owe amounts under this Note, I will pay those amounts on that date, which is called the "Maturity Date."  
I will make my Monthly Payments at 1800 W. 213TH STREET, TORRANCE, CA 90501 or at a different place if required by the Note Holder.  
(B) **Amount of Monthly Payments**  
My Monthly Payment will be in the amount of U.S. \$ 800.70. This payment amount does not include any property taxes, insurance, or other charges that I may be required to pay each month.
- BORROWER'S RIGHT TO PREPAY**  
I have the right to make payments of principal at any time before they are due. A payment of principal only is known as a "Prepayment." When I make a Prepayment, I will notify the Note Holder in writing that I am doing so. I may not designate a payment as a Prepayment if I have not made all the Monthly Payments then due under this Note.

Signature & Initials  
Signature  
Initials  
PostFill  
Notary

Documents

Document Name	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
Multistate Fixed Rate Electronic Note																				
New Jersey Addendum to Residential Loan Agreement																				
Uniform Residential Loan Application																				
New Jersey Mortgage (MERS)																				
General Closing Instructions																				
Specific Closing Instructions																				
Borrower's Certification, Authorization and Acknowledgment																				
Certificate of Loans to One Borrower																				
Hazard Insurance Authorization																				
IVES Request for Transcript of Title																				
W9 - Payers Request for Taxpayer Identification Number and Certification																				
Acknowledgment of Receipt of Documents																				
Closing Disclosure																				
Compliance Agreement																				
Customer Identification Verification																				
Federal Equal Credit Opportunity Act Acknowledgment																				
Impound Authorization																				
Initial Escrow Account Disclosure																				
New Jersey Choice of Insurance Notice	✓	1	1	1															9707347   9729525	njcoin.msc.xml
New Jersey Initial Tax Authorization Notice	✓	1	0	0	✓														9707348   9729526	njitan.msc.xml

- The Pencil icon allows you to view, edit, and add tags for the entire package. The Document Editor will open in another window. Click [here](#) for the full guide.
- Please note that you may not edit any tags that were originally generated with the package – they will be greyed out. However, you can use the toolbox on the right to add additional tags.

# Documents Received

eSign Console - Alan Dai Scheduler Monitoring Accounts eSign Requests Create Request Search Account

Loan #: 777050420260003	Lender: Alan Dai	Status: New (Active)
Primary Name: John Smith	DSI TEST LENDER (SALES)	Documents: 28 (81 total pages)
Type: EClosing	(100SALES)	Signers: 2
Package Id: 1618957	aland@docmagic.com	Expires: N/A (Requires: Primary)
Worksheet #: 4310 (Version : 1)	(800)649-1362	Signatures: Y (Ink Sign)
Closing Date: 5/6/26		

Details Documents Documents Received 1 EMail Versions

#	Preview	PDF	Uploaded	Document	Operation
1			5/4/26, 4:15 PM	<div style="border: 1px solid gray; padding: 2px;"><p>Please select document</p><ul style="list-style-type: none"><li>Please select document</li><li>Multistate Fixed Rate Note Page 1</li><li>Multistate Fixed Rate Note Page 2</li><li>Multistate Fixed Rate Note Page 3</li><li>Multistate Fixed Rate Note Page 4</li><li>New Jersey Mortgage (MERS) Page 1</li><li>New Jersey Mortgage (MERS) Page 2</li><li>New Jersey Mortgage (MERS) Page 3</li><li>New Jersey Mortgage (MERS) Page 4</li><li>New Jersey Mortgage (MERS) Page 5</li><li>New Jersey Mortgage (MERS) Page 6</li><li>New Jersey Mortgage (MERS) Page 7</li><li>New Jersey Mortgage (MERS) Page 8</li><li>New Jersey Mortgage (MERS) Page 9</li></ul></div>	<div style="border: 1px solid gray; padding: 2px;"><p>Cancel Request</p><p>Delete Request</p></div>

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- Documents Received contains unrecognized uploads that were received from a print and sign upload – usually as part of the Settlement Agent’s print and sign workflow for a Hybrid eClose.
- You may need to identify these documents individually for the system to recognize them.

# Emails

eSign Console - Alan Dai Scheduler Monitoring Accounts eSign Requests Create Request Search Account

Loan #: <b>777042320260001</b>	Lender: <b>Alan Dai</b>	Status: <b>Signed (Active)</b>
Primary Name: <b>John Smith</b>	DSI TEST LENDER (SALES)	Documents: <b>36</b> (130 total pages)
Type: <b>EClosing</b>	(100SALES)	Signers: <b>5</b>
Package Id: <b>1604096</b>	aland@docmagic.com	Expires: <b>N/A</b> (Requires: Primary)
Worksheet #: <b>4284</b> (Version : 1)	(800)649-1362	Signatures: <b>Y</b>
Closing Date: <b>4/23/26</b>		

Details Documents Documents Received **E-mails** Versions Recordings

### Emails

Created	Event	To:	CC:	Status
4/23/26, 9:53 AM	SendInvitation	aland@docmagic.com		Created
4/23/26, 9:53 AM	SendInvitation	acarson@docmagic.com		Created
4/23/26, 9:53 AM	SendInvitation	aland@docmagic.com		Created
4/23/26, 9:53 AM	SendInvitation	acarson@docmagic.com		Created
4/23/26, 9:53 AM	SendInvitation	aland@docmagic.com		Created
4/23/26, 9:53 AM	SendInvitation	aland@docmagic.com		Created
4/23/26, 9:54 AM	ConsentEsign	aland@docmagic.com		Created
4/23/26, 9:54 AM	ConsentEsign	acarson@docmagic.com		Created
4/23/26, 9:56 AM	ConsentEsign	aland@docmagic.com		Created
4/23/26, 9:56 AM	ConsentEsign	acarson@docmagic.com		Created
4/23/26, 10:11 AM	Notary Invitation Requested	ron-test@docmagic.com		Created
4/23/26, 10:12 AM	Notary Invitation Accepted	ron-test@docmagic.com		Created
4/23/26, 10:12 AM	Notary Invitation Accepted	aland@docmagic.com		Created
4/23/26, 10:12 AM	Notary Comment Received	aland@docmagic.com		Created
4/23/26, 10:14 AM	eClosing Scheduled	aland@docmagic.com		Created
4/23/26, 10:20 AM	Ready To Close	acarson@docmagic.com		Created

- Emails contains a chronological listing of every email sent out as part of the document package.

# Versions

eSign Console - Alan Dai Scheduler Monitoring Accounts eSign Requests Create Request Search Account

Loan #: 777042320260005 Lender: Alan Dai Status: Printed (Active)  
Primary Name: John Smith DSI TEST LENDER (SALES) Documents: 1 (4 total pages)  
Type: Loan Estimate (100SALES) Signers: 3  
Package Id: 1604299 aland@docmagic.com Expires: 4/26/26, 10:21 PM (Requires: Primary)  
Worksheet #: 4289 (Version : 1) (800)649-1362 Signatures: Y  
Closing Date: 4/27/26

Details Documents Documents Received E-mails Versions

### Versions

#	Package Type	Version	Package ID	Created	Active
1	Initial Disclosure	1	1604298	4/23/26, 4:18 PM	Y
2	Loan Estimate Documents	1	1604299	4/23/26, 4:21 PM	Y
3	Interim Disclosure and Notice	1	1604305	4/23/26, 4:28 PM	Y

Add Internal Note

Cancel Request Delete Request

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- If applicable, other Versions of the package can be found here, including redraws.


# Recordings

eSign Console - Alan Dai Scheduler Monitoring Accounts eSign Requests Create Request Search Account

Loan #: <b>777042320260001</b>	Lender: <b>Alan Dai</b>	Status: <b>Signed (Active)</b>
Primary Name: <b>John Smith</b>	DSI TEST LENDER (SALES)	Documents: <b>36</b> (130 total pages)
Type: <b>EClosing</b>	(100SALES)	Signers: <b>5</b>
Package Id: <b>1604096</b>	aland@docmagic.com	Expires: <b>N/A</b> (Requires: Primary)
Worksheet #: <b>4284</b> (Version : 1)	(800)649-1362	Signatures: <b>Y</b>
Closing Date: <b>4/23/26</b>		

Details Documents Documents Received EMail Versions Recordings

Recordings

#	File	Date Recorded	
1	1604096_2026-04-23T17_21_18_716Z.mp4	April 23, 2026 • 10:21am PDT	

Add Internal Note

Cancel Request Delete Request

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- If applicable, recording(s) of RON transaction(s) associated with the package can be found here. This tab will not be visible if there are no recordings.

# Signing Complete

eSign Console - Alan Dai

Scheduler Monitoring Accounts eSign Requests Create Request Search Account

Loan #: 777050620260004 Lender: **Andrea Carlson** Status: **Signed (Active)**  
 Primary Name: **John Smith** DSI TEST LENDER (SALES) (100SALES) Documents: **36** (110 total pages)  
 Type: **EClosing** acarlson@docmagic.com Signers: **5**  
 Package Id: **1620431** 8006491362 Expires: **N/A** (Requires: Primary)  
 Worksheet #: **4323** (Version : 1) Signatures: **Y**  
 Closing Date: **5/11/26**

Details Documents Documents Received EMail Versions Recordings

### Participants

#	Name/Email	Role	Created	Started	Consented	Viewed	Completed	Declined	Links
1	John Smith aland@docmagic.com	Borrower	5/6/26 2:07 PM	5/6/26 2:08 PM	5/6/26 2:08 PM	5/6/26 2:08 PM	5/6/26 2:19 PM		Send Email Sign Documents 4506-C
2	Sandy Smith aland@docmagic.com	Borrower	5/6/26 2:07 PM	5/6/26 2:20 PM	5/6/26 2:17 PM	5/6/26 2:20 PM	5/6/26 2:24 PM		Send Email Sign Documents 4506-C
4	Byron Oden acarlson@docmagic.com	Settlement Agent	5/6/26 2:07 PM	5/6/26 2:10 PM	5/6/26 2:10 PM	5/6/26 2:10 PM	5/6/26 2:11 PM		Send Email Agent Portal
5	Docmagic Notary ron-test@docmagic.com	Notary	5/6/26 2:07 PM	5/6/26 2:19 PM	5/6/26 2:18 PM	5/6/26 2:19 PM	5/6/26 2:20 PM		Send Email Sign Documents
6	Docmagic Notary ron-test@docmagic.com	Notary	5/6/26 2:07 PM	5/6/26 2:24 PM	5/6/26 2:20 PM	5/6/26 2:24 PM	5/6/26 2:25 PM		Send Email Sign Documents

### Action Log

Date	User	IP Address	Description
5/6/26 2:07 PM	System User		eSign event created and expires on 05/11/2026
5/6/26 2:07 PM	System User		Preview Mode enabled until 05/11/2026
5/6/26 2:07 PM	John Smith		Invitation sent to aland@docmagic.com
5/6/26 2:07 PM	Sandy Smith		Invitation sent to aland@docmagic.com
5/6/26 2:07 PM	Byron Oden		Invitation sent to acarlson@docmagic.com
5/6/26 2:07 PM	Alan Dai		Preview Mode was disabled
5/6/26 2:08 PM	John Smith		Consented to DocMagic eSign
5/6/26 2:08 PM	John Smith		eSign event started
5/6/26 2:08 PM	John Smith		Closing Documents version 1 prepared on May 06, 2026, 2:07 PM PDT displayed

- A package is considered "done" when all participants have completed their workflows.
- Please note that document packages will only remain in the eSign Console for 90 Days. Please remember to download and save all signed documents and recordings before the 90 days is up.
- You can create custom one-time eSign requests from the Create Request function. Please visit the [eSign Console](#) section of the [Product Training Page](#) for instructions.