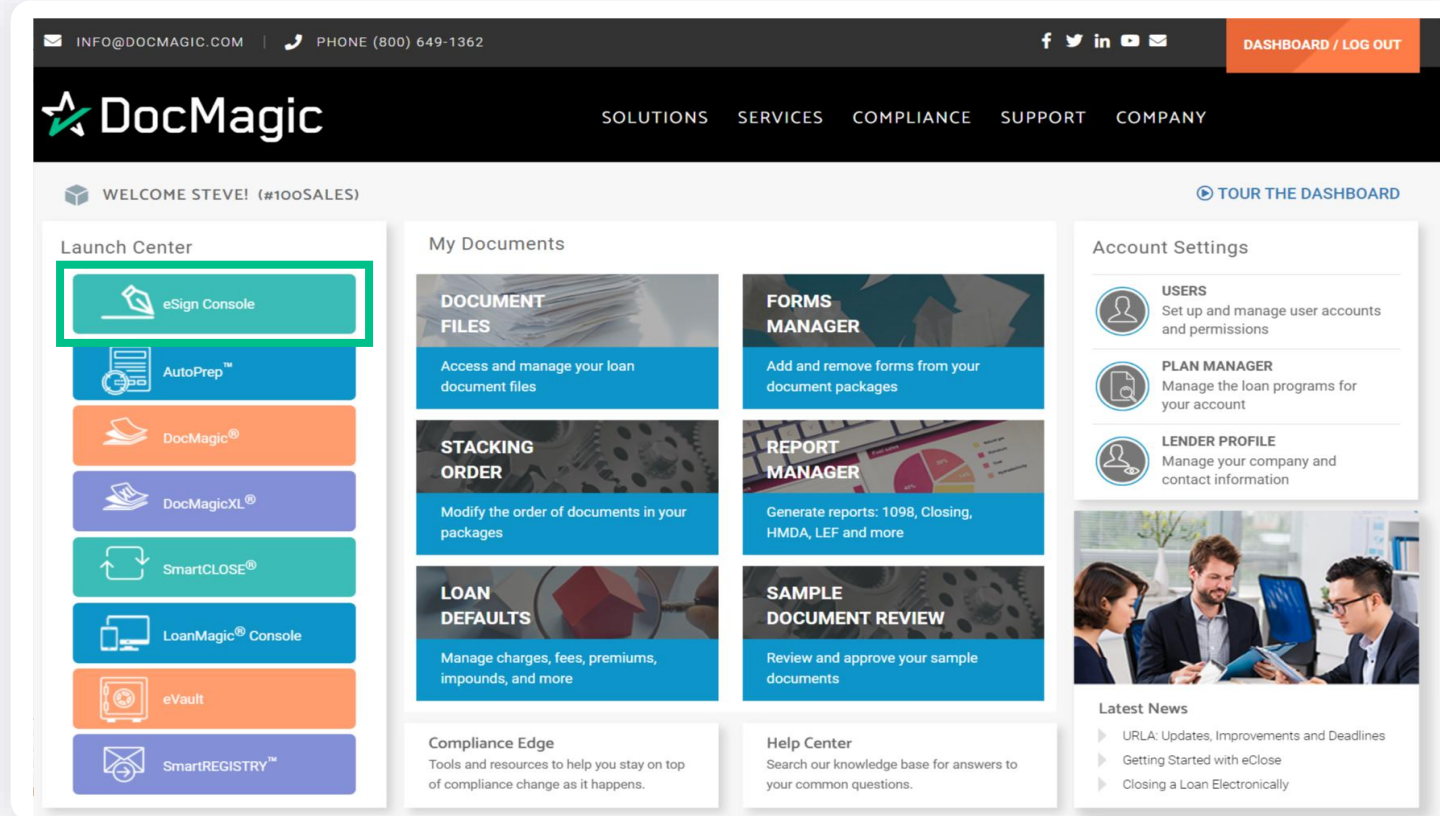


eSign Console

Lender Portal

Getting Started



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

eSign Console

eSign Console - Alan Dai

eSign Requests Create Request Search Account

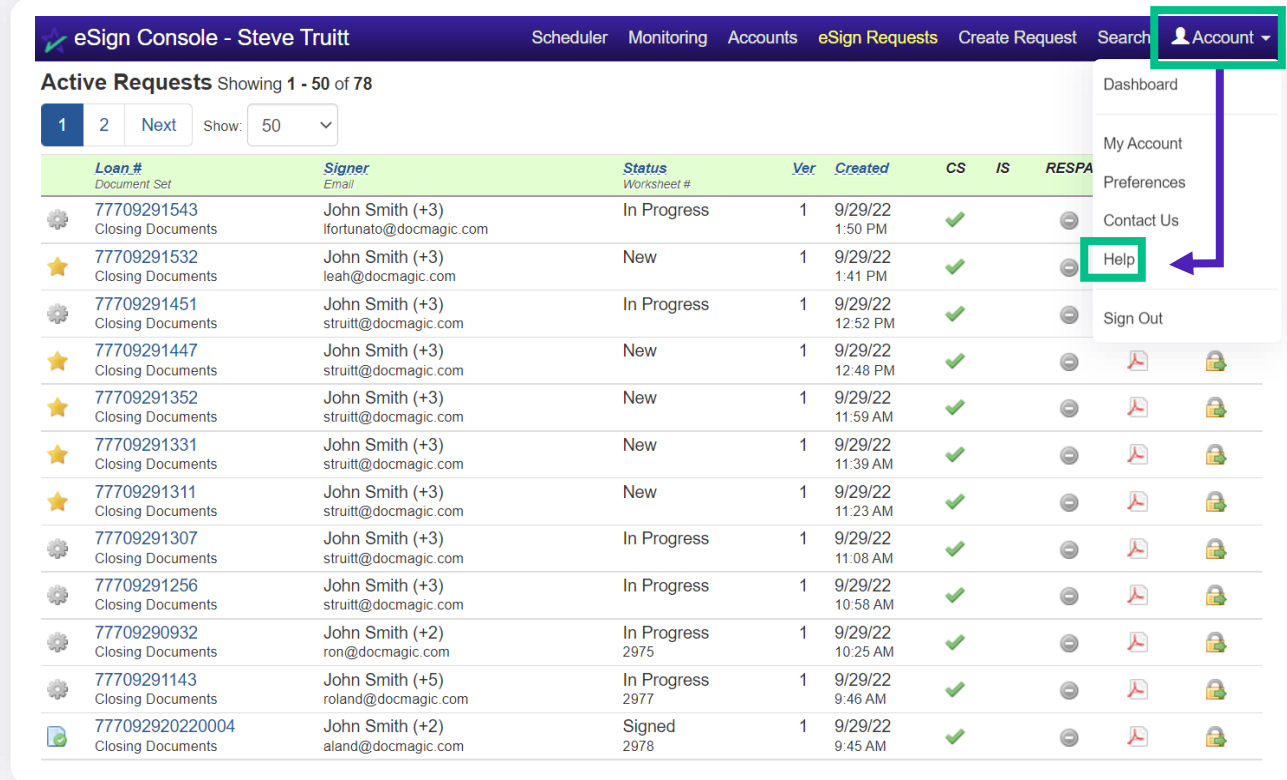
Active Requests Showing 1 - 17 of 17

1 Show: 50

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

- 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.
- 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



The screenshot shows the eSign Console interface for Steve Truitt. The top navigation bar includes links for Scheduler, Monitoring, Accounts, eSign Requests, Create Request, Search, and Account. The Account dropdown menu is open, showing options: Dashboard, My Account, Preferences, Contact Us, Help, and Sign Out. The Help option is highlighted with a green box and a purple arrow. Below the navigation bar, there is a section for Active Requests showing 1 - 50 of 78. A table lists various loan requests with columns for Loan #, Document Set, Signer, Status, Ver, Created, CS, IS, and RESPA. The table contains 14 rows of data.

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

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

Status Icons

eSign Console - Alan Dai

eSign Requests Create Request Search Account

Active Requests Showing 1 - 17 of 17

1 Show: 50

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

- The 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).
- ⚙️ A gear icon means the loan is in progress.
- 🖨️ The computer monitor with the check mark indicates that the participant(s) have consented the use of electronic signatures and eSign.
- 📄 A page icon with a check means that the transaction has been signed and is complete.
- 🟢 The green circle with a check mark indicates a document has been completed, signed and printed.

Opening a Document Set

eSign Console - Alan Dai

eSign RequestsCreate RequestSearchAccount

Active RequestsShowing 1 - 17 of 17

1Show: 50

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

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

Key Information

The screenshot shows the 'eSign Console - Steve Truitt' interface. At the top, there's a navigation bar with links: Scheduler, Monitoring, Accounts, eSign Requests, Create Request, Search, and Account. Below this, a green-bordered box contains key loan information:

Loan #: 77710031350	Lender: Ron Carrillo	Status: New (Active)
Primary Name: John Smith	DSI TEST LENDER (SALES) (100SALES)	Documents: 15 (55 total pages)
Type: EClosing	ron@docmagic.com	Signers: 3
Package Id: 604282	(708)531-9060	Expires: N/A (Requires: Primary)
Worksheet #: 2990 (Version : 1)		Signatures: Y
Closing Date: 9/30/22		

Below the green box, there are tabs: Details, Documents, Documents Received, EMail, and Versions. To the right of these tabs are icons for various actions. The 'Participants' section shows a table with columns: #, Name/Email, Role, Created, Started, Consented, Viewed, Completed, Declined, and Links. The table lists three participants: John Smith (Borrower), Andy Agent (Settlement Agent), and Notary_name_placeholder-1 (Notary). The 'Action Log' section shows a table with columns: Date, User, IP Address, and Description. It lists three actions: 'eSign event created', 'Invitation sent to ron@docmagic.com', and 'Invitation sent to ron@docmagic.com'. At the bottom, there are buttons for 'Add Internal Note', 'Cancel Request', and 'Delete Request'. The footer contains copyright information and links to Home, Contact, Privacy Policy, and Terms of Use.

Key Information Summary:

- Loan Information:** Loan # 77710031350, Primary Name John Smith, Type EClosing, Package Id 604282, Worksheet # 2990 (Version : 1), Closing Date 9/30/22.
- Lender Details:** Lender Ron Carrillo, DSI TEST LENDER (SALES) (100SALES), ron@docmagic.com, (708)531-9060.
- Document Package Information:** Status New (Active), Documents 15 (55 total pages), Signers 3, Expires N/A (Requires: Primary), Signatures Y.

- The 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, please have your Worksheet # ready.

Details

eSign Console - Steve Truitt

Scheduler Monitoring Accounts eSign Requests Create Request Search Account

Return to Search

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

Details Documents Documents Received EMail Versions

Participants

Preview Mode - Off

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

Action Log

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

Add Internal Note

Cancel Request Delete Request

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Home Contact Privacy Policy Terms of Use

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

Details

eSign Console - Steve Truitt

SchedulerMonitoringAccountseSign Requestscancel RequestSearchAccount

Return to Search

Loan #: 77710031350

Primary Name: John Smith

Type: EClosing

Package Id: 604282

Worksheet #: 2990 (Version : 1)

Closing Date: 9/30/22

Lender: Ron Carrillo

DSI TEST LENDER (SALES) (100SALES)

ron@docmagic.com

(708)531-9060

Status: New (Active)

Documents: 15 (55 total pages)

Signers: 3

Expires: N/A (Requires: Primary)

Signatures: Y

DetailsDocumentsDocuments ReceivedEmailsVersions

Preview Mode - Off

Participants

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

Action Log

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

Add Internal Note

Cancel RequestDelete Request

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HomeContactPrivacy PolicyTerms of Use

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

Links

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

Return to Search

Loan #: 77710031350 Lender: Ron Carrillo Status: New (Active)
Primary Name: John Smith DSI TEST LENDER (SALES) (100SALES) Documents: 15 (55 total pages)
Type: EClosing ron@docmagic.com Signers: 3
Package Id: 604282 (708)531-9060 Expires: N/A (Requires: Primary)
Worksheet #: 2990 (Version : 1) Signatures: Y
Closing Date: 9/30/22

Details Documents Documents Received EMail Versions

Participants  Preview Mode - Off

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

Action Log

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

Add Internal Note

Cancel Request Delete Request

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- 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.
- Sign Documents allows you to open that Participant’s signing experience – this assumes that the Participant is with you.
 - Selecting Sign Documents opens the eSign experience in another tab.
- If there is a Settlement Agent on this transaction, you may also enter their portal from here.

Adding Participants

The screenshot displays the eSign Console interface for a user named Steve Truitt. The main window shows loan details for Loan # 77710031350, Primary Name John Smith, and Lender Ron Carrillo. A modal window titled "Add Participant" is open, prompting the user to provide information for a new participant. The modal includes fields for First Name, Last Name, Email, Access Code, and a Role dropdown menu (currently set to Settlement Agent). There are "Add" and "Cancel" buttons at the bottom of the modal. In the background, a table lists participants, with a green "person-plus" icon highlighted next to the first entry, John Smith.

Add Participant

Please provide the information for the new participant.

First Name:

Last Name:

Email:

Access Code:

Role:



Click on the green 'person-plus' icon to add participants.

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

Disable Preview Mode Toggle

The screenshot displays the eSign Console interface for a loan with ID 77710031350. The interface includes a top navigation bar with links like Scheduler, Monitoring, Accounts, eSign Requests, Create Request, Search, and Account. Below the navigation bar, there's a summary section with loan details: Primary Name (John Smith), Lender (Ron Carrillo), Status (New (Active)), Documents (15 (55 total pages)), Signers (3), Expires (N/A (Requires: Primary)), and Signatures (Y). The interface also has tabs for Details, Documents, Documents Received, EMail, and Versions. A 'Preview Mode - Off' toggle is visible in the top right corner of the Participants section. The Participants table lists three participants: John Smith (Borrower), Andy Agent (Settlement Agent), and Notary (Notary). The Action Log table shows three actions: eSign event created, Invitation sent to ron@docmagic.com, and Invitation sent to ron@docmagic.com. At the bottom, there are links for Home, Contact, Privacy Policy, and Terms of Use.

eSign Console - Steve Truitt

Scheduler Monitoring Accounts eSign Requests Create Request Search Account

Return to Search

Loan #: 77710031350
Primary Name: John Smith
Type: EClosing
Package Id: 604282
Worksheet #: 2990 (Version : 1)
Closing Date: 9/30/22

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

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

Details Documents Documents Received EMail Versions

Participants

Preview Mode - Off

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

Action Log

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

Add Internal Note

Cancel Request Delete Request

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Home Contact Privacy Policy Terms of Use

- You may see a “Preview Mode” when you process Closing Packages.
- If Preview Mode is On, then participants will only be able to view their documents but not sign.
- Preview Mode determines if participants can sign their documents or if they can only view them.
- By default, Preview Mode is On until midnight Hawaii time on the day closing.
- By default, the Settlement Agent can toggle Preview Mode. We'll show you how to disable it in the next slide.

Disable Preview Mode Toggle

eSign Console - Stephen Truitt

Scheduler Monitoring Accounts eSign Requests Create Request Search Account

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

Theme

DocMagic

Default Email Templates

Event	Request Type	Loan Type
Request Client Fulfill		
Sent to DSI Print Queue		
Request Paper Copy		
Complete Sigreq		
Send Invitation		
Send Invitation	Standard	
Sigreq Consented		
Document Mailed		

LENDER NAME (100AB)
System

Closing Agent Portal: Yes

Allow Email Change: Yes

Multi Auth Enabled: No

Allow Borrower Comments: Yes

Allow signer to request paper copy: Yes

Notification Level: Level 3

Name Capitalization: Yes

Remove option to Withdraw Consent: No

Disable Preview Mode Toggle: Yes

General

Time Zone: America/Los_Angeles

Participants

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

Clone Theme

Assign Existing Theme

Create New Theme

Edit Advanced Email Preferences

Edit Preferences

Subject	From
Request Requested - Print and Mail Now(% else %)Disclosures {maybeLoanNumberBrackets}}	
{CaseName}} {(maybeLoanNumberBrackets}}	
Request Completed (% else %) Document Review Request {kets}}	
{ets}}	
{rBrackets}}	
{rackets}}	

- Select Accounts from the top.
 - Accounts is plural, if you do not see this option, you may not have adequate user permissions.
- Find your account.
- Select Edit Preferences.
- Find “Disable Preview Mode Toggle” and set it to “Yes”. The Settlement Agent will no longer be able to control Preview Mode.

Documents Tab

eSign Console - Steve Truitt

SchedulerMonitoringAccountseSign RequestsCreate RequestSearchAccount

Loan #: 77710031350

Primary Name: John Smith

Type: EClosing

Package Id: 604824

Worksheet #: 2990 (Version : 2)

Closing Date: 9/30/22

Lender: Steve Truitt

DSI TEST LENDER (SALES) (100SALES)

struitt@docmagic.com

(800)649-1362

Status: New (Active)

Documents: 15 (55 total pages)

Signers: 2

Expires: N/A (Requires: Primary)

Signatures: Y (Ink Sign)

DetailsDocumentsDocuments ReceivedEmailsVersions

Documents

Document Name	ClickSign	Page(s)	Mark(s)	Signer(s)	Completed	SignReq	Document Id Document Id	Filename	Delete	Operation
1 Borrower's Certification, Authorization and Consent	✓	2	1	1			5175538 5187039	bcac.msc.xml		
2 Multistate Fixed Rate Note		0/4	1	1			5175539 5187040	us3200.not.xml		Mark as Complete
3 New Jersey Mortgage (MERS)		0/19	1	1			5175540 5187041	nj3031.mzm.xml		Mark as Complete
4 Uniform Residential Loan Application	✓	7	1	1			5175541 5187042	urla.msc.xml		
5 Uniform Residential Loan Application - Lender Loan Information	✓	2	0	0	✓		5175542 5187043	urlalli.msc.xml		
6 Addendum to Closing Instructions	✓	1	1	1			5175543 5187044	atci3.msc.xml		
7 Specific Closing Instructions	✓	3	4	2			5175544 5187045	sci.msc.xml		
8 Hazard Insurance Authorization and Requirements	✓	2	1	1			5175545 5187046	hazard8.lsr.xml		
9 IVES Request for Transcript of Tax Return	✓	2	2	1			5175546 5187047	4506c.msc.xml		
10 Closing Disclosure	✓	5	1	1			5175547 5187048	cd.dsc.xml		
11 Customer Identification Verification	✓	2	0	0	✓		5175548 5187049	civ.msc.xml		
12 Initial Escrow Account Disclosure Statement	✓	2	1	1			5175549 5187050	ieads.msc.xml		
13 New Jersey Initial Tax Authorization Notice	✓	1	0	0	✓		5175550 5187051	njltan.msc.xml		
14 New Jersey Private Well Testing Act Certification	✓	1	1	1			5175551 5187052	njpwat.msc.xml		
15 Signature Affidavit and AKA Statement		0/2	1	1			5175552 5187053	saakas.msc.xml		Mark as Complete

Add Internal Note

- 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.

Adding a Document

The screenshot shows the eSign Console interface for a loan. A modal titled 'Upload a new document' is open, with a 'Browse' button highlighted by a green box. In the background, the 'Documents' tab is active, and a green box highlights a plus icon in the 'Documents' header. Below the modal, a table lists various documents with their status and completion progress.

Document Name	Progress	File Name
1 Borrower's Certification, Authorization	✓	urla.msc.xml
2 Multistate Fixed Rate Note	✓	urlall.msc.xml
3 New Jersey Mortgage (MERS)	✓	atci3.msc.xml
4 Uniform Residential Loan Application	✓	sci.msc.xml
5 Uniform Residential Loan Application - Lender Loan Information	✓	hazard8.lsr.xml
6 Addendum to Closing Instructions	✓	4506c.msc.xml
7 Specific Closing Instructions	✓	cd.dsc.xml
8 Hazard Insurance Authorization and Requirements	✓	civ.msc.xml
9 IVES Request for Transcript of Tax Return	✓	leads.msc.xml
10 Closing Disclosure	✓	njltan.msc.xml
11 Customer Identification Verification	✓	njpwat.msc.xml
12 Initial Escrow Account Disclosure Statement	✓	saakas.msc.xml
13 New Jersey Initial Tax Authorization Notice	✓	
14 New Jersey Private Well Testing Act Certification	✓	
15 Signature Affidavit and AKA Statement	0/2	

- The Plus icon allows you to add documents to the package.
- Click Browse. Select a document from your computer and then click the blue Submit button.
- This will upload your document and activate [AutoPrep](#) for electronic tagging.

The screenshot shows the AutoPrep interface for preparing a document titled "1johnsandysmith_title docs.pdf". The main workspace displays a notary certificate form with the following fields and instructions:

- Acknowledgment:** A line for acknowledgment with a green checkmark icon and a blue pin icon.
- Notary Statement:** A box containing the text: "A notary public or other officer completing this certificate verifies only the identity of the individual who signs the document to which this certificate is attached, and not the truthfulness, accuracy, or validity of that document."
- State:** A dropdown menu set to "CALIFORNIA".
- County:** A dropdown menu set to "LOS ANGELES".
- Notarization Date:** A date picker set to "On" followed by a date field.
- Before me:** A line for the notary's name and title.
- Personally appeared:** A line with the text "John Smith AND Sandy Smith".
- Name(s) of Signer(s):** A line for the signer's name.
- Signature:** A line for the signature of the notary public.
- Commission Number:** A line for the commission number.
- Notary Seal:** A blue box with a notary seal icon and the text "Notary Seal".

On the right side, there is a sidebar with a "Done" button at the top. Below it, the "Assigned to" section shows "Notary" with a lock icon. A "Required" checkbox is checked. At the bottom of the sidebar, there is a "Commission Number" field.

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

Check Added Document

eSign Console - Alan Dai

eSign RequestsCreate RequestSearchAccount

Loan #: 777092320250001

Primary Name: Stephen Truitt

Type: EClosing

Package Id: 113759872

Worksheet #: 189 (Version : 1)

Closing Date: 9/24/25

Lender: Stephen Truitt

DSI TEST LENDER (STEVE TRUITT) (100ST)

struitt@docmagic.com

Status: In Progress (Active)

Documents: 30 (106 total pages)

Signers: 4

Expires: N/A (Requires: Primary)

Signatures: Y (Ink Sign)

DetailsDocumentsDocuments ReceivedEMailsVersions

Documents

Document Name	ClickSign	Page(s)	Mark(s)	Signer(s)	Completed	Delete	Operation
1 Uniform Residential Loan Application	✓	8	8	2	✓		
2 Multistate Fixed Rate Electronic Note	✓	4	1	1	✓		
3 Maryland License Information or Affidavit		2/2	1	1	✓		
4 Maryland Purchase Money Deed of Trust (MERS)	✓	20	24	2			
5 Multistate 1-4 Family Rider	✓	2	1	1			
6 General Closing Instructions	✓	2	2	1	✓		
7 Specific Closing Instructions	✓	3	5	2	✓		
8 Hazard Insurance Authorization and Requirements	✓	2	1	1	✓		
9 W9 - Payers Request for Taxpayer ID	✓	6	2	1	✓		
10 Notice of Servicing Transfer	✓	1	0	0	✓		
11 Acknowledgment of Receipt of Appraisal Report	✓	1	1	1	✓		
12 Borrower's Certification, Authorization and Consent	✓	2	1	1	✓		
13 Certificate of Loans to One Borrower	✓	2	14	1	✓		
14 Closing Disclosure	✓	5	1	1	✓		
15 Compliance Agreement	✓	2	11	2			
16 Customer Identification Verification	✓	2	73	1			
17 Federal Equal Credit Opportunity Act Notice (ECOA)	✓	1	1	1	✓		
18 IVES Request for Transcript of Tax Return	✓	2	4	1	✓		
19 Impound Authorization	✓	2	1	1	✓		
20 Initial Escrow Account Disclosure Statement	✓	2	1	1	✓		
21 Maryland Application Disclosure	✓	1	1	1	✓		
22 Maryland Delivery of Net Proceeds Authorization	✓	1	1	1	✓		
23 Maryland Notice of Your Right to Rescind a Purchase Contract	✓	1	1	1	✓		
24 Maryland Written Acknowledgement of Delivery of the Note	✓	1	1	1	✓		
25 Notice Concerning Furnishing Negative Information	✓	1	1	1	✓		
26 Occupancy and Financial Status Affidavit	✓	3	11	2			
27 Payment Letter to Borrower	✓	2	1	1	✓		
28 Signature Affidavit and AKA Statement	✓	2	11	2			

30 1JohnSandySmith_Title_Docs

✓

21

6

3

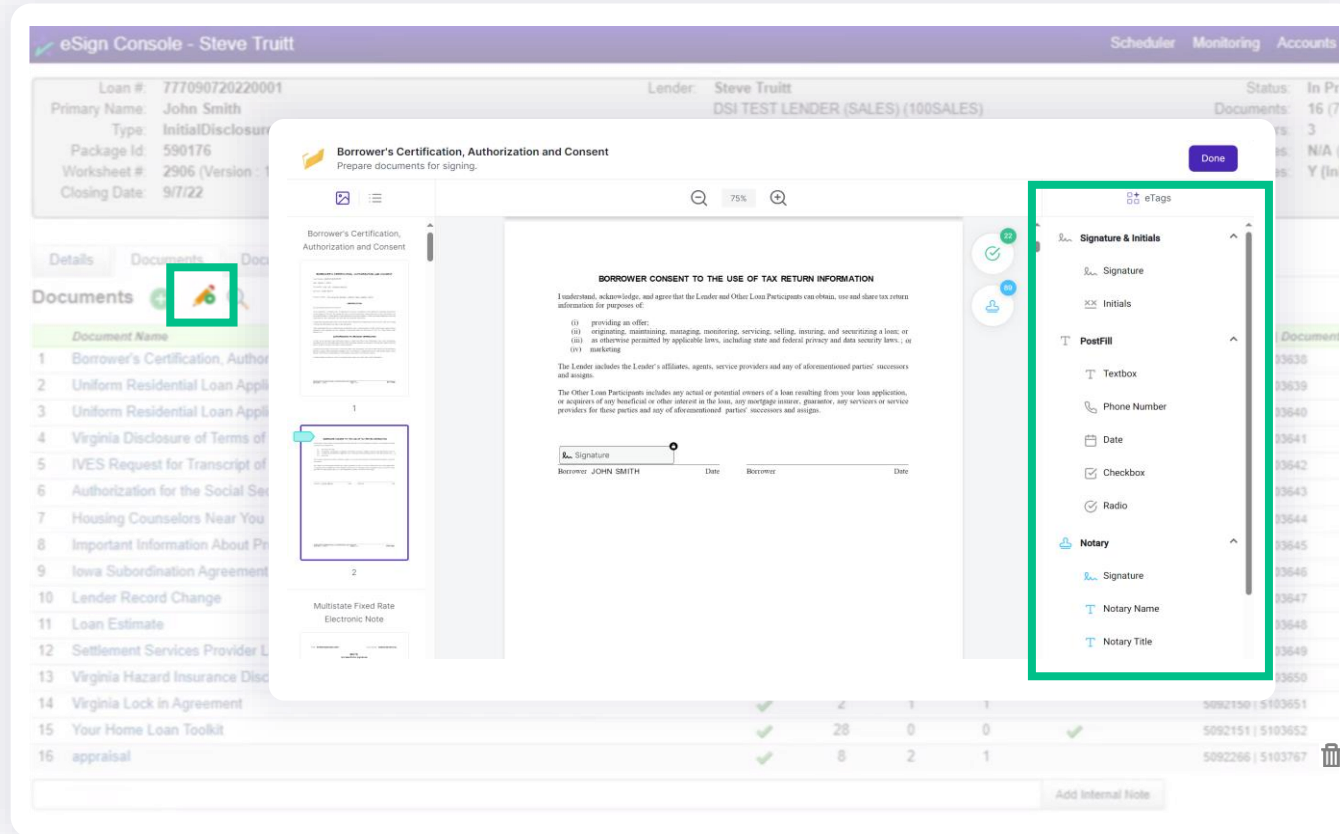
Cancel RequestDelete Request

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- Clicking Done will close out that window and you can return to the eSign Console.
- Refresh the page and click on the Documents Tab.
- The document that you added will now be at the bottom. You can also remove this document if you want by clicking on the Trash icon to the far right.

Check Added Document



The Pencil icon allows you to edit the entire set of documents.

- You can utilize the Toolbox on the right to move, add, delete any fields that aren't already locked in place.
- The Document Editor will open in another window. Click [here](#) for the guide.

Documents Received

eSign Console - Alan Dai

eSign RequestsCreate RequestSearchAccount

Loan #: 777092320250001

Primary Name: Stephen Truitt

Type: EClosing

Package Id: 113759872

Worksheet #: 189 (Version : 1)

Closing Date: 9/24/25

Lender: Stephen Truitt

DSI TEST LENDER (STEVE TRUITT)

(100ST)

struitt@docmagic.com

Status: In Progress (Active)

Documents: 29 (85 total pages)

Signers: 4

Expires: N/A (Requires: Primary)

Signatures: Y (Ink Sign)

DetailsDocumentsDocuments ReceivedEMailsVersions

#PreviewPDFUploadedDocumentOperation

Add Internal Note

Cancel RequestDelete Request

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- Documents Received is an area where documents that have been uploaded without a QR code or another identifier will show up. These may include wet-signed or external PDFs.
- You may need to identify these documents individually for them to be recognized in the system.

Emails

eSign Console - Alan Dai

eSign RequestsCreate RequestSearchAccount

Loan #: 777092320250001

Primary Name: Stephen Truitt

Type: EClosing

Package Id: 113759872

Worksheet #: 189 (Version : 1)

Closing Date: 9/24/25

Lender: Stephen Truitt

DSI TEST LENDER (STEVE TRUITT) (100ST)

struitt@docmagic.com

Status: In Progress (Active)

Documents: 30 (106 total pages)

Signers: 4

Expires: N/A (Requires: Primary)

Signatures: Y (Ink Sign)

DetailsDocumentsDocuments ReceivedE-mailsVersions

E-mails

Created	Event	To:	CC:	Status
9/23/25, 9:47 AM	Send Invitation	struitt@docmagic.com		Created
9/23/25, 9:47 AM	Send Invitation	aland@docmagic.com		Created
9/23/25, 9:47 AM	Send Invitation	aland@docmagic.com		Created
9/23/25, 9:51 AM	Consent Esign	struitt@docmagic.com		Created
9/23/25, 9:52 AM	Consent Esign	struitt@docmagic.com		Created
9/23/25, 9:53 AM	Consent Esign	struitt@docmagic.com		Created
9/23/25, 9:53 AM	Consent Esign	struitt@docmagic.com		Created
9/24/25, 6:19 AM	New reminder sent	struitt@docmagic.com		Created
9/24/25, 6:19 AM	New reminder sent	struitt@docmagic.com		Created
9/25/25, 6:28 AM	New reminder sent	struitt@docmagic.com		Created
9/25/25, 6:28 AM	New reminder sent	struitt@docmagic.com		Created
9/25/25, 2:51 PM	Document Batch Upload Completed	struitt@docmagic.com		Created

Add Internal Note

Cancel Request

Delete Request

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- Emails contain the invitations that you've sent out already. This is simply a log of all of them in chronological order.

Versions

eSign Console - Alan Dai

eSign RequestsCreate RequestSearchAccount

Loan #: 777092320250001
Primary Name: Stephen Truitt
Type: EClosing
Package Id: 113759872
Worksheet #: 189 (Version : 1)
Closing Date: 9/24/25

Lender: Stephen Truitt
DSI TEST LENDER (STEVE TRUITT) (100ST)
struitt@docmagic.com

Status: In Progress (Active)
Documents: 30 (106 total pages)
Signers: 4
Expires: N/A (Requires: Primary)
Signatures: Y (Ink Sign)

DetailsDocumentsDocuments ReceivedEMailsVersions

Versions

#	Package Type	Version	Package ID	Created	Active
1	Closing Documents	1	113759872	9/23/25, 9:47 AM	Y

Add Internal Note

Cancel Request

Delete Request

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- If you have different versions of the loan package (say due to a redraw), they will be listed here.
- Only one version at a time will be active – denoted by a “Y”.

Milestones

eSign Console - Steve Truitt

SchedulerMonitoringAccountseSign Requestscancel RequestSearchAccount

Return to Search

Loan #: 77710031350

Primary Name: John Smith

Type: EClosing

Package Id: 604282

Worksheet #: 2990 (Version : 1)

Closing Date: 9/30/22

Lender: Ron Carrillo

DSI TEST LENDER (SALES) (100SALES)

ron@docmagic.com

(708)531-9060

Status: New (Active)

Documents: 15 (55 total pages)

Signers: 3

Expires: N/A (Requires: Primary)

Signatures: Y

DetailsDocumentsDocuments ReceivedEMailsVersions

Participants

Preview Mode - Off

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

Action Log

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

Add Internal Note

Cancel RequestDelete Request

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- Each column in this middle area represents a stage in the signing process for each participant.
 - In this example, the eSign event has been created, but non of our participants have started the process.
- Timestamps will populate in the columns as participants go through the process.

Borrower's Signing Experience

The screenshot shows the DocMagic web interface for a borrower's signing experience. At the top, the DocMagic logo is on the left, and navigation buttons for 'Review', 'Sign', and 'Completed' are in the center. On the right, a user profile for 'JOHN SMITH Customer' is displayed. Below the navigation bar, a message says 'Please review your documents.' and the document title is 'Initial Disclosure Borrower's Certification, Authorization and Consent'. A 'Start signing' button is in the top right corner of the document area. The main content area displays the document text, which includes a section titled 'BORROWER CONSENT TO THE USE OF TAX RETURN INFORMATION'. The text states: 'I understand, acknowledge, and agree that the Lender and Other Loan Participants can obtain, use and share tax return information for purposes of: (i) providing an offer; (ii) originating, maintaining, managing, monitoring, servicing, selling, insuring, and securitizing a loan; or (iii) as otherwise permitted by applicable laws, including state and federal privacy and data security laws.; or (iv) marketing'. It then defines 'The Lender' and 'The Other Loan Participants'. At the bottom of the document area, there are signature and date lines for the Borrower, JOHN SMITH. On the right side of the interface, a sidebar lists the documents in the package: 'Borrower's Certification, Authorization and ...', 'Addendum to Loan Application', 'California Domestic Partnership Addendu...', 'Uniform Residential Loan Application', 'IVES Request for Transcript of Tax Return', 'Authorization for the Social Security Admi...', 'California Acknowledgment of Receipt of L...', 'California Copies of Signed Documents', 'California Fair Lending Notice', 'California Hazard Insurance Disclosure', 'Housing Counselors Near You', 'Important Information About Procedures f...', 'Iowa Subordination Agreement', and 'Lender-Related Changes'. Icons for document, user, and information are also present next to the list.

DocMagic

Review Sign Completed

JOHN SMITH Customer

Please review your documents.

Initial Disclosure

Borrower's Certification, Authorization and Consent

BORROWER CONSENT TO THE USE OF TAX RETURN INFORMATION

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

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

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

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

Signature

Borrower JOHN SMITH Date

Borrower Date

Borrower's Certification, Authorization and ...

Addendum to Loan Application

California Domestic Partnership Addendu...

Uniform Residential Loan Application

IVES Request for Transcript of Tax Return

Authorization for the Social Security Admi...

California Acknowledgment of Receipt of L...

California Copies of Signed Documents

California Fair Lending Notice

California Hazard Insurance Disclosure

Housing Counselors Near You

Important Information About Procedures f...

Iowa Subordination Agreement

Lender-Related Changes

- When the Borrower clicks on the link in the invitation email, they will be taken to DocMagic's signing experience.
- Here, the Borrower will be able to sign the necessary documents.
 - For more information on the Borrower's signing experience, please visit our [Product Training Page](#).

Signing Complete

eSign Console - Alan Dai

eSign RequestsCreate RequestSearchAccount

Loan #: 77791620250001
Primary Name: Stephen Truitt
Type: EClosing
Package Id: 113582533
Worksheet #: 186 (Version : 1)
Closing Date: 9/17/25

Lender: Stephen Truitt
DSI TEST LENDER (STEVE TRUITT) (100ST)
struitt@docmagic.com

Status: Signed (Active)
Documents: 29 (85 total pages)
Signers: 4
Expires: N/A (Requires: Primary)
Signatures: Y (Ink Sign)

DetailsDocumentsDocuments ReceivedEMailsVersionsRecordings

Participants

#	Name/Email	Role	Created	Started	Consented	Viewed	Completed	Declined	Links
1	Stephen Truitt struitt@docmagic.com	Borrower	9/16/25 9:59 AM	9/16/25 10:21 AM	9/16/25 10:16 AM	9/16/25 10:21 AM	9/16/25 10:26 AM		Send Email Sign Documents 4506-C
2	Byron Settlement struitt@docmagic.com	Settlement Agent	9/16/25 9:59 AM	9/16/25 10:05 AM	9/16/25 10:05 AM	9/16/25 10:05 AM	9/16/25 10:06 AM		Send Email Agent Portal
3	Contact Here struitt@docmagic.com	Originator	9/16/25 9:59 AM	9/16/25 10:32 AM	9/16/25 10:32 AM	9/16/25 10:32 AM	9/16/25 10:33 AM		Send Email Sign Documents
4		Notary	9/16/25 9:59 AM	9/16/25 10:27 AM	9/16/25 10:21 AM	9/16/25 10:27 AM	9/16/25 10:30 AM		Send Email Sign Documents

Action Log

Date	User	IP Address	Description
9/16/25 9:59 AM	System User		eSign event created
9/16/25 9:59 AM	Stephen Truitt		Invitation sent to struitt@docmagic.com
9/16/25 9:59 AM	Byron Settlement		Invitation sent to struitt@docmagic.com
9/16/25 9:59 AM	Contact Here		Invitation sent to struitt@docmagic.com
9/16/25 10:03 AM	Christopher Miller		The request for eNotary services has been sent to Notary.
9/16/25 10:04 AM	System User		Christopher Miller has accepted the invitation to be notary
9/16/25 10:05 AM	Byron Settlement		Consented to DocMagic eSign
9/16/25 10:05 AM	Byron Settlement		eSign event started
9/16/25 10:05 AM	Byron Settlement		Closing Documents version 1 prepared on September 16, 2025, 9:59 AM PDT displayed
9/16/25 10:06 AM	Byron Settlement		Approved electronic representation of signature
9/16/25 10:06 AM	Byron Settlement		Approved electronic representation of signature
9/16/25 10:06 AM	Byron Settlement		General Closing Instructions signed by BYRON SETTLEMENT
9/16/25 10:06 AM	Byron Settlement		Specific Closing Instructions signed by BYRON SETTLEMENT

- After the Borrower and all other participants complete their signing experience, you'll be able to see the row of date and time stamps as completed.
- The Action Log documents all the steps that have been taken along the way for a full accounting of the process.

Signing Complete

eSign Console - Alan Dai

eSign RequestsCreate RequestSearchAccount

Loan #: 77791620250001
Primary Name: Stephen Truitt
Type: EClosing
Package Id: 113582533
Worksheet #: 186 (Version : 1)
Closing Date: 9/17/25

Lender: Stephen Truitt
DSI TEST LENDER (STEVE TRUITT) (100ST)
struitt@docmagic.com

Status: Signed (Active)
Documents: 29 (85 total pages)
Signers: 4
Expires: N/A (Requires: Primary)
Signatures: Y (Ink Sign)

DetailsDocumentsDocuments ReceivedEMailsVersionsRecordings

Participants

#	Name/Email	Role	Created	Started	Consented	Viewed	Completed	Declined	Links
1	Stephen Truitt struitt@docmagic.com	Borrower	9/16/25 9:59 AM	9/16/25 10:21 AM	9/16/25 10:16 AM	9/16/25 10:21 AM	9/16/25 10:26 AM		Send Email Sign Documents 4506-C
2	Byron Settlement struitt@docmagic.com	Settlement Agent	9/16/25 9:59 AM	9/16/25 10:05 AM	9/16/25 10:05 AM	9/16/25 10:05 AM	9/16/25 10:06 AM		Send Email Agent Portal
3	Contact Here struitt@docmagic.com	Originator	9/16/25 9:59 AM	9/16/25 10:32 AM	9/16/25 10:32 AM	9/16/25 10:32 AM	9/16/25 10:33 AM		Send Email Sign Documents
4	Christopher E Miller cemiller15@gmail.com	Notary	9/16/25 9:59 AM	9/16/25 10:27 AM	9/16/25 10:21 AM	9/16/25 10:27 AM	9/16/25 10:30 AM		Send Email Sign Documents

Action Log

Date	User	IP Address	Description
9/16/25 9:59 AM	System User		eSign event created
9/16/25 9:59 AM	Stephen Truitt		Invitation sent to struitt@docmagic.com
9/16/25 9:59 AM	Byron Settlement		Invitation sent to struitt@docmagic.com
9/16/25 9:59 AM	Contact Here		Invitation sent to struitt@docmagic.com
9/16/25 10:03 AM	Christopher Miller		The request for eNotary services has been sent to Notary.
9/16/25 10:04 AM	System User		Christopher Miller has accepted the invitation to be notary
9/16/25 10:05 AM	Byron Settlement		Consented to DocMagic eSign
9/16/25 10:05 AM	Byron Settlement		eSign event started
9/16/25 10:05 AM	Byron Settlement		Closing Documents version 1 prepared on September 16, 2025, 9:59 AM PDT displayed
9/16/25 10:06 AM	Byron Settlement		Approved electronic representation of signature
9/16/25 10:06 AM	Byron Settlement		Approved electronic representation of signature
9/16/25 10:06 AM	Byron Settlement		General Closing Instructions signed by BYRON SETTLEMENT
9/16/25 10:06 AM	Byron Settlement		Specific Closing Instructions signed by BYRON SETTLEMENT

- The icons on the top right help with post-signing:



The Print Mail icon sends the package to the print request queue at DocMagic.



The PDF icon allows you to download the entire signed document.



The Ribbon icon lets you download the eSign Certificate.



The Printer icon prints out the signed documents.



The Circling Arrows PDF allows you to reset the PDF.



The Lock icon allows you to archive the package.

eSign Certificate



DocMagic eSign Certificate

eSign Id:	113120218	Reference Id:	182	From:	STEPHEN TRUITT	Status:	Signed
Documents Type:	CLOSING DOCUMENTS	Loan Id:	777082620250001	Documents:	37	Signatures:	Y

List of Signers

Name/Email	Signature	Created Date	Started Date	Consented Date	Viewed Date	Completed Date
STEPHEN TRUITT struitt@docmagic.com		08/26/25 10:39:03 AM	08/26/25 10:44:23 AM	08/26/25 10:44:22 AM	08/26/25 10:44:23 AM	08/26/25 10:47:05 AM
KIMBERLY ABELSON-TRUITT aland@docmagic.com		08/26/25 10:39:04 AM	08/26/25 10:42:50 AM	08/26/25 10:42:49 AM	08/26/25 10:42:50 AM	08/26/25 10:47:05 AM
BYRON SETTLEMENT struitt@docmagic.com		08/26/25 10:39:04 AM	08/26/25 10:42:06 AM	08/26/25 10:42:05 AM	08/26/25 10:42:06 AM	08/26/25 10:42:26 AM
CONTACT HERE struitt@docmagic.com		08/26/25 10:39:05 AM	08/26/25 10:41:21 AM	08/26/25 10:41:20 AM	08/26/25 10:41:21 AM	08/26/25 10:47:03 AM

Audit Log

Date/Time	Person	IP Address	Action
2025-08-26 10:39:04	System User		eSign event created
2025-08-26 10:39:04	STEPHEN TRUITT	10.1.106.24	Invitation sent to struitt@docmagic.com
2025-08-26 10:39:04	KIMBERLY ABELSON-TRUITT	10.1.106.24	Invitation sent to aland@docmagic.com
2025-08-26 10:39:04	BYRON SETTLEMENT	10.1.106.24	Invitation sent to struitt@docmagic.com
2025-08-26 10:39:04	CONTACT HERE	10.1.106.24	Invitation sent to struitt@docmagic.com
2025-08-26 10:41:20	CONTACT HERE	10.1.10.99	Consented to DocMagic eSign
2025-08-26 10:41:21	CONTACT HERE	10.1.10.99	eSign event started

- The entire eSign Certificate can be saved and printed after clicking on the  (PDF) icon in the icon menu.
- The eSign Certificate will be generated along with the final package.
- 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

eSign Console - Alan Dai

eSign RequestsCreate RequestSearchAccount

Loan #: 77791620250001
Primary Name: Stephen Truitt
Type: EClosing
Package Id: 113582533
Worksheet #: 186 (Version : 1)
Closing Date: 9/17/25

Lender: Stephen Truitt
DSI TEST LENDER (STEVE TRUITT) (100ST)
struitt@docmagic.com

Status: Signed (Active)
Documents: 29 (85 total pages)
Signers: 4
Expires: N/A (Requires: Primary)
Signatures: Y (Ink Sign)

DetailsDocumentsDocuments ReceivedEMailsVersionsRecordings

Participants

#	Name/Email	Role	Created	Started	Consented	Viewed	Completed	Declined	Links
1	Stephen Truitt struitt@docmagic.com	Borrower	9/16/25 9:59 AM	9/16/25 10:21 AM	9/16/25 10:16 AM	9/16/25 10:21 AM	9/16/25 10:26 AM		Send Email Sign Documents 4506-C
2	Byron Settlement struitt@docmagic.com	Settlement Agent	9/16/25 9:59 AM	9/16/25 10:05 AM	9/16/25 10:05 AM	9/16/25 10:05 AM	9/16/25 10:06 AM		Send Email Agent Portal
3	Contact Here struitt@docmagic.com	Originator	9/16/25 9:59 AM	9/16/25 10:32 AM	9/16/25 10:32 AM	9/16/25 10:32 AM	9/16/25 10:33 AM		Send Email Sign Documents
4	Christopher E Miller cemiller15@gmail.com	Notary	9/16/25 9:59 AM	9/16/25 10:27 AM	9/16/25 10:21 AM	9/16/25 10:27 AM	9/16/25 10:30 AM		Send Email Sign Documents

Action Log

Date	User	IP Address	Description
9/16/25 9:59 AM	System User		eSign event created
9/16/25 9:59 AM	Stephen Truitt		Invitation sent to struitt@docmagic.com
9/16/25 9:59 AM	Byron Settlement		Invitation sent to struitt@docmagic.com
9/16/25 9:59 AM	Contact Here		Invitation sent to struitt@docmagic.com
9/16/25 10:03 AM	Christopher Miller		The request for eNotary services has been sent to Notary.
9/16/25 10:04 AM	System User		Christopher Miller has accepted the invitation to be notary
9/16/25 10:05 AM	Byron Settlement		Consented to DocMagic eSign
9/16/25 10:05 AM	Byron Settlement		eSign event started
9/16/25 10:05 AM	Byron Settlement		Closing Documents version 1 prepared on September 16, 2025, 9:59 AM PDT displayed
9/16/25 10:06 AM	Byron Settlement		Approved electronic representation of signature
9/16/25 10:06 AM	Byron Settlement		Approved electronic representation of signature
9/16/25 10:06 AM	Byron Settlement		General Closing Instructions signed by BYRON SETTLEMENT
9/16/25 10:06 AM	Byron Settlement		Specific Closing Instructions signed by BYRON SETTLEMENT

- If there are document(s) that you want to send separately, click “Create Request” in the top right corner.
- Click on the Bonus Material section on the [Lender’s Product Training Page](#) for details.