



AutoPrep™

The Complete Guide

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AutoPrep™ is DocMagic's proprietary software that automatically tags documents.

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- ✓ Initiate an eClose transaction from AutoPrep™
- ✓ No eNote Creation

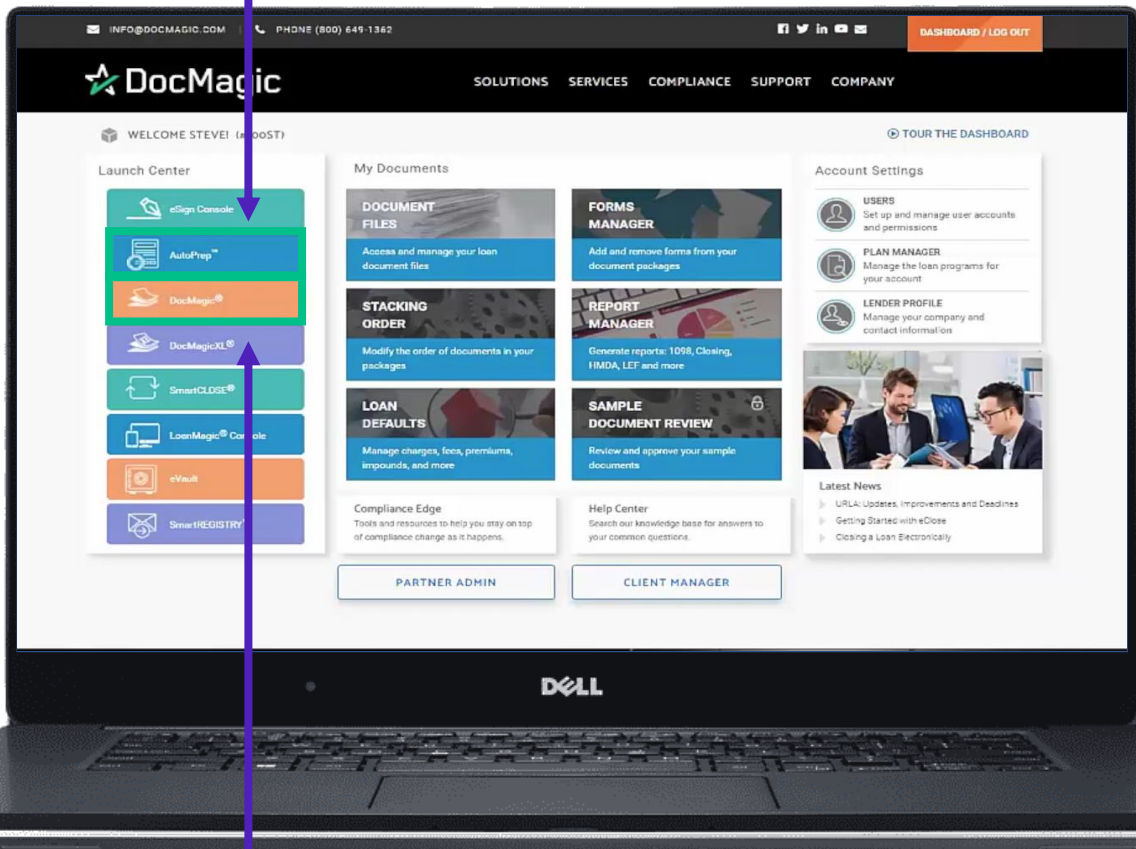
## Using AutoPrep™ from the Settlement Agent Portal Page 30

- ✓ Ensure proper e-tagging of documents

Determine which of these use cases suits you best and skip to that portion of the guide. Happy tagging!



Start by going to the DocMagic dashboard. If you do not need to generate an eNote, click on the AutoPrep™ icon and skip to page 6 of this guide.



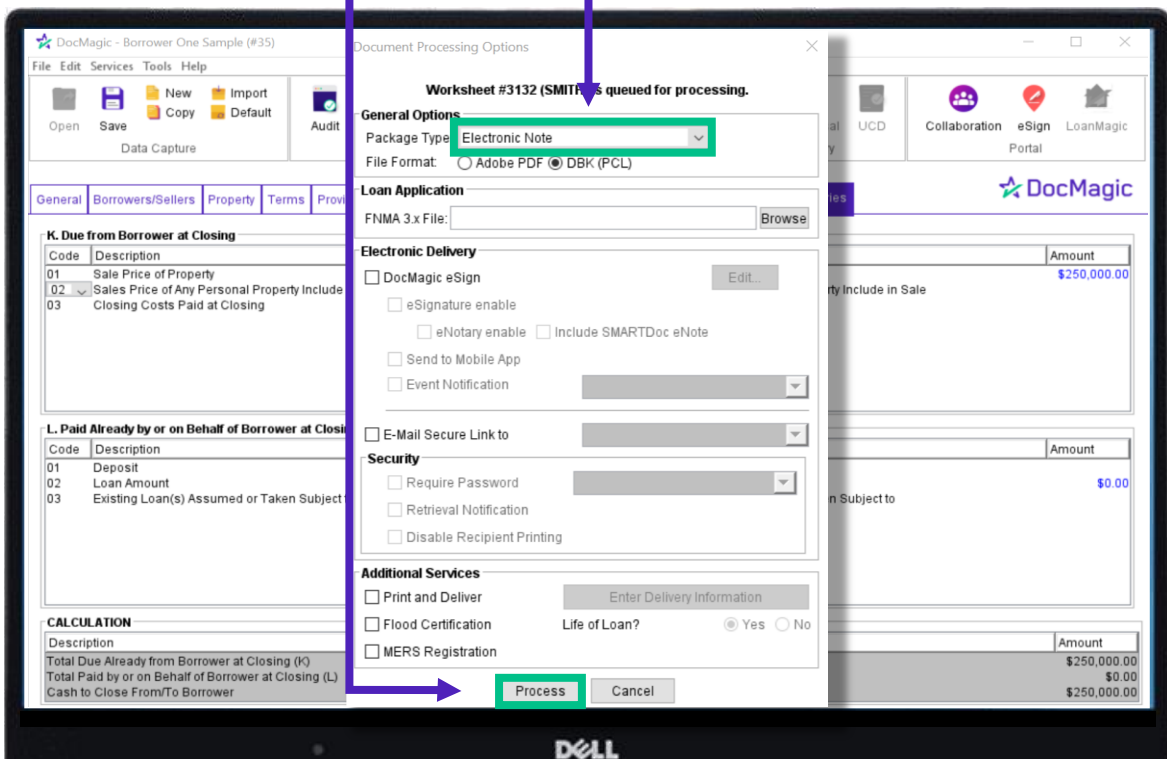
If you need to generate an eNote, click on DocMagic to launch DocMagic Online.



# AutoPrep™ - DocMagic Online

Draw The Rest of the Owl

Process the eNote from your loan file. Select Electronic Note under Package Type and click Process.



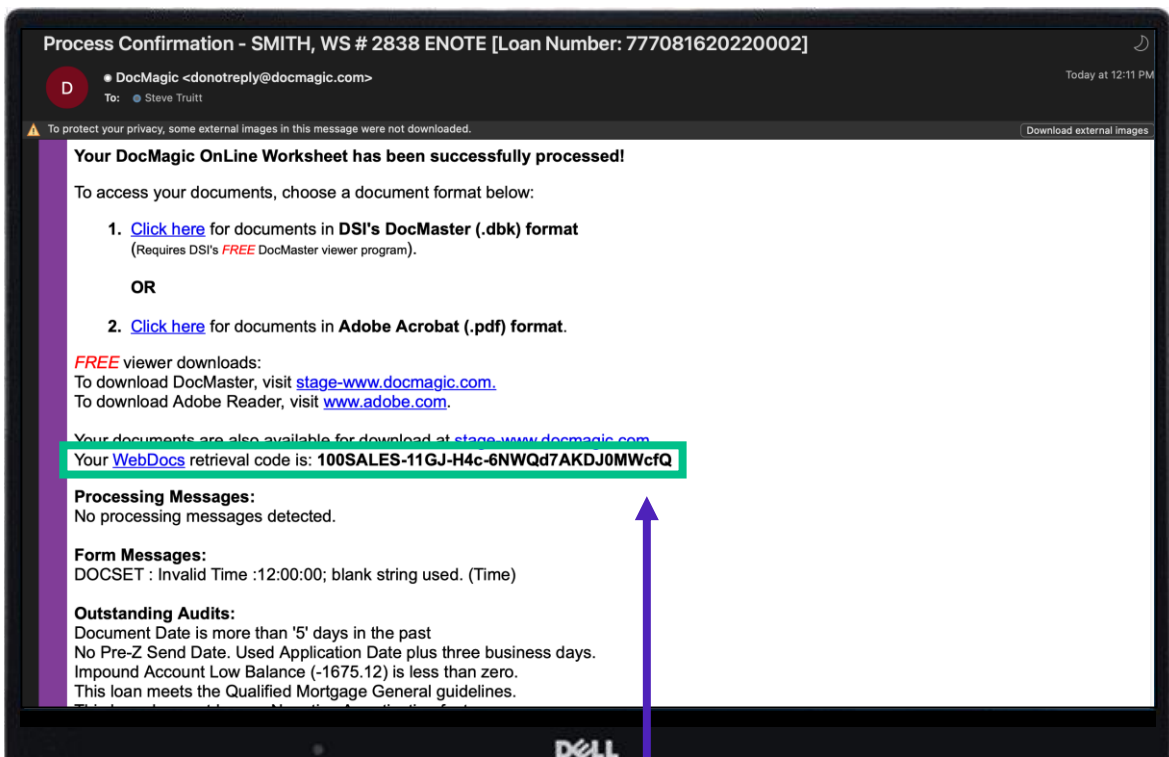
Not sure how we got here? Please check out our [DocMagic Online training section of the Product Training page](#).



# AutoPrep™ - DocMagic Online

Grab The WebDocs Code

When you process the eNote, you will receive this confirmation email.



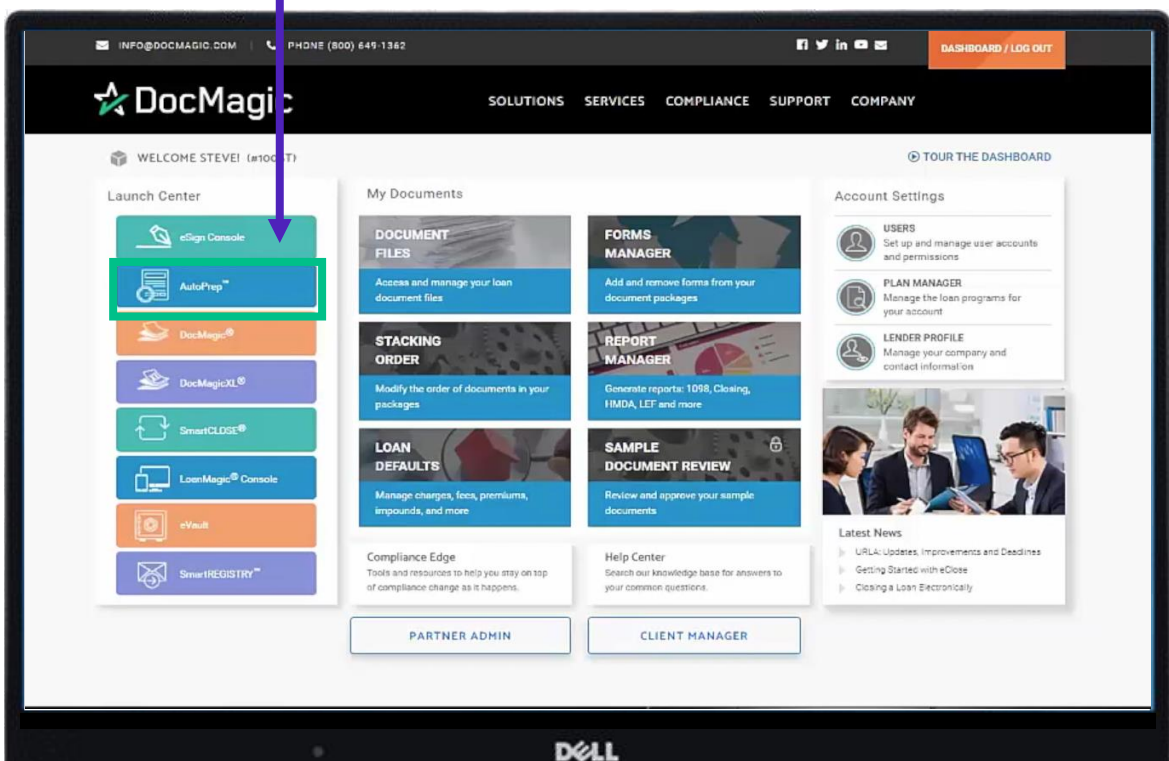
Copy this WebDocs retrieval code. You will need it when you upload documents to AutoPrep™.



# AutoPrep™ - DocMagic Online

Start AutoPrep™

Go to the dashboard and choose AutoPrep™ from the Launch Center.



Once the page loads, you'll be greeted with this screen. Start by entering the Loan Number.

AutoPrep

Transaction Details

Loan Number  
7770128202300001

Include eNote?  Yes  No

eNotary Enable?  Yes  No

Closing Date

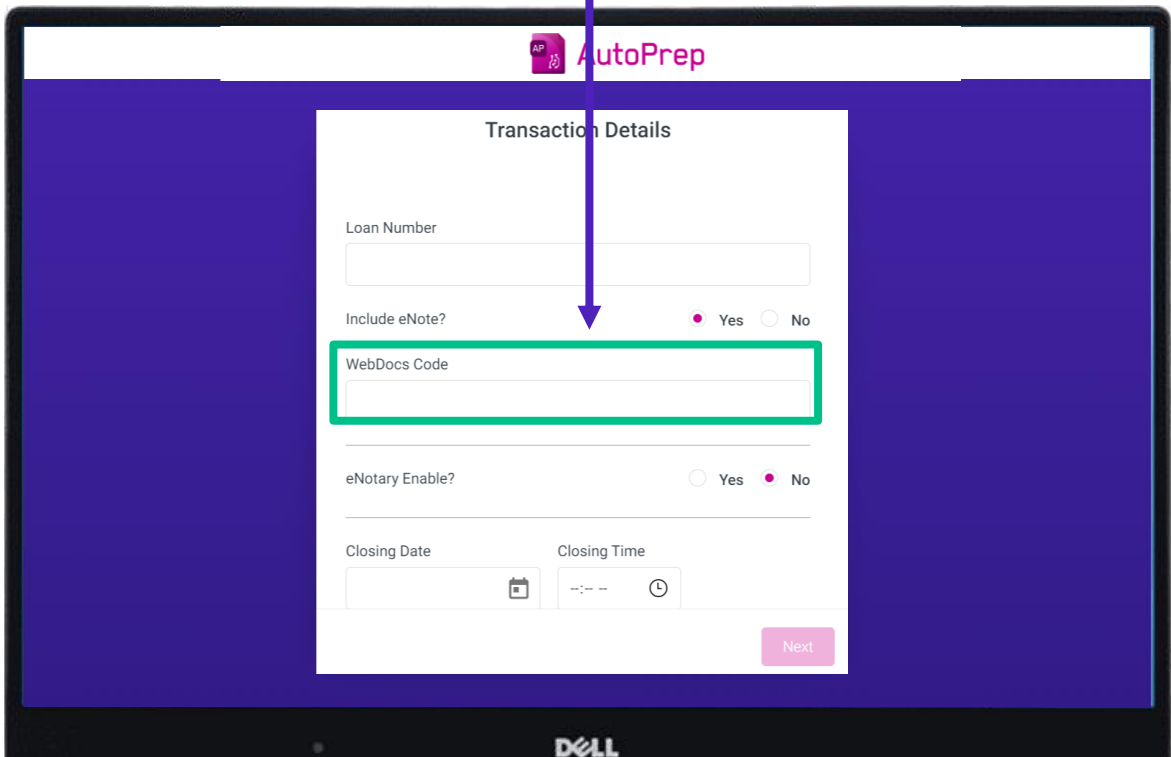
Closing Time

Next

Select the radio button to indicate whether you will include an eNote or not.



If you select Yes for Include eNote, a field will appear below where you can enter in your WebDocs Code.



The screenshot shows the AutoPrep web interface on a Dell monitor. The page title is "Transaction Details". The form contains the following fields and options:

- Loan Number: A text input field.
- Include eNote?: Radio buttons for Yes (selected) and No.
- WebDocs Code: A text input field, highlighted with a green border.
- eNotary Enable?: Radio buttons for Yes and No (selected).
- Closing Date: A date picker.
- Closing Time: A time picker.
- Next: A pink button at the bottom right.

If you are not using an eNote, ignore this page.





Regardless of whether you include an eNote, you will still need to select whether eNotary is enabled and enter a closing date and time.

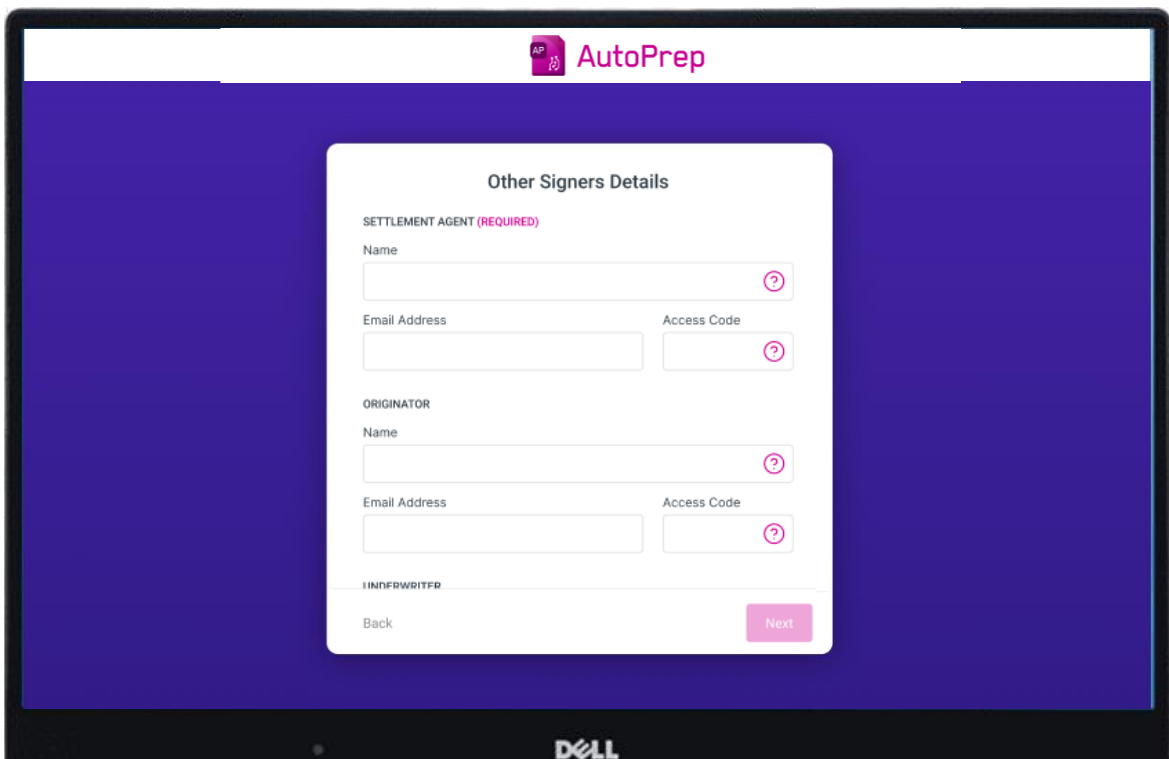
The screenshot shows the 'Transaction Details' form on a Dell monitor. The form is titled 'Transaction Details' and has the AutoPrep logo at the top. It contains the following fields and options:

- Loan Number: 7770128202300001
- Include eNote?:  Yes  No
- eNotary Enable?:  Yes  No
- Closing Date: 1/19/2023
- Closing Time: 09:00 AM
- Next button: A pink button labeled 'Next' is located at the bottom right of the form.

Once you enter enough information, the Next button will no longer be greyed out. Click it to continue.



Enter information for buyer, seller, settlement agent, originator, underwriter, and notary.

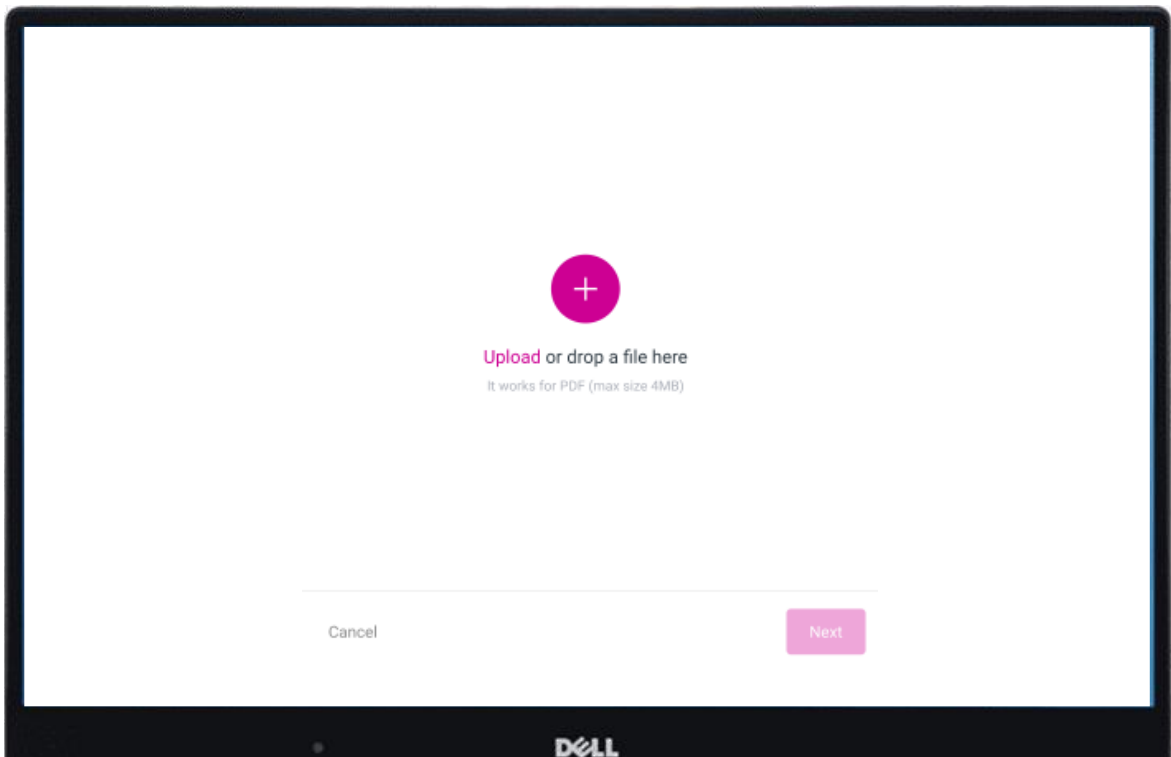


The screenshot shows a computer monitor displaying the AutoPrep web application. The page title is "Other Signers Details". It features three sections for data entry: "SETTLEMENT AGENT (REQUIRED)", "ORIGINATOR", and "UNDERWRITER". Each section includes a "Name" field and an "Access Code" field. The "SETTLEMENT AGENT" section also includes an "Email Address" field. Each field has a question mark icon to its right. At the bottom of the form, there are "Back" and "Next" buttons. The Dell logo is visible at the bottom of the monitor frame.

Borrower information needs to be entered EXACTLY as it appears in the document.



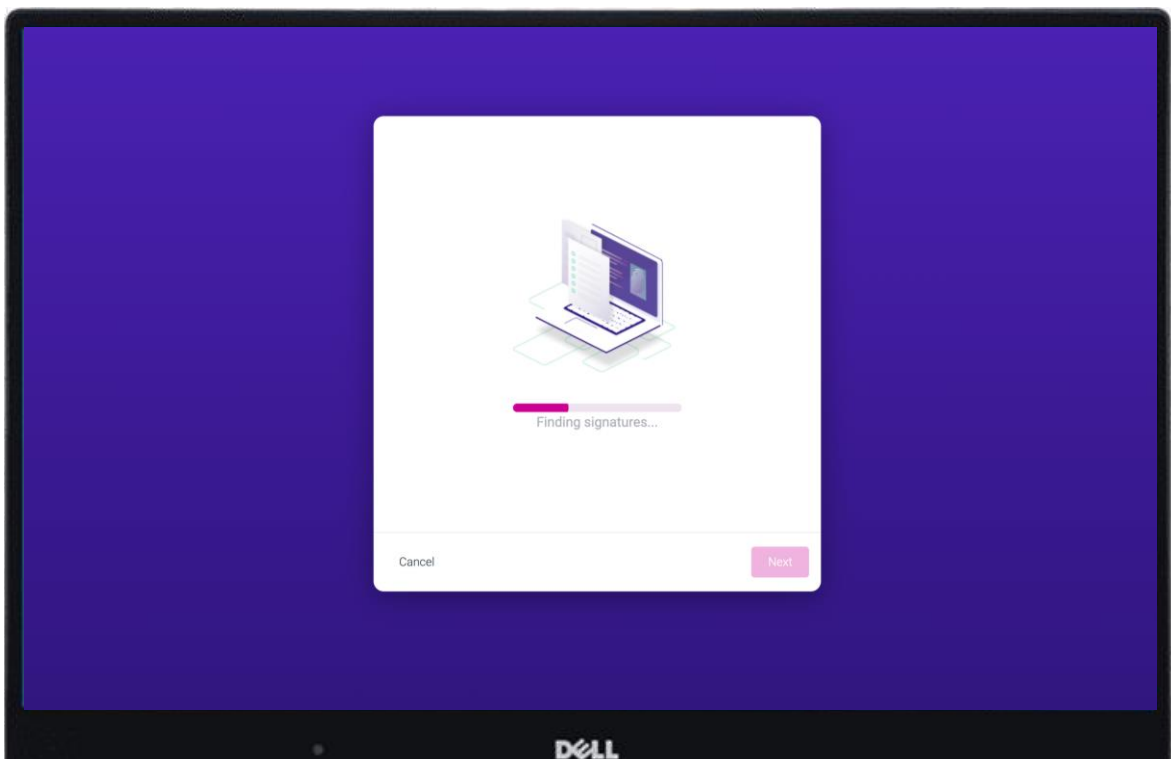
Upload a PDF that you wish to prepare.



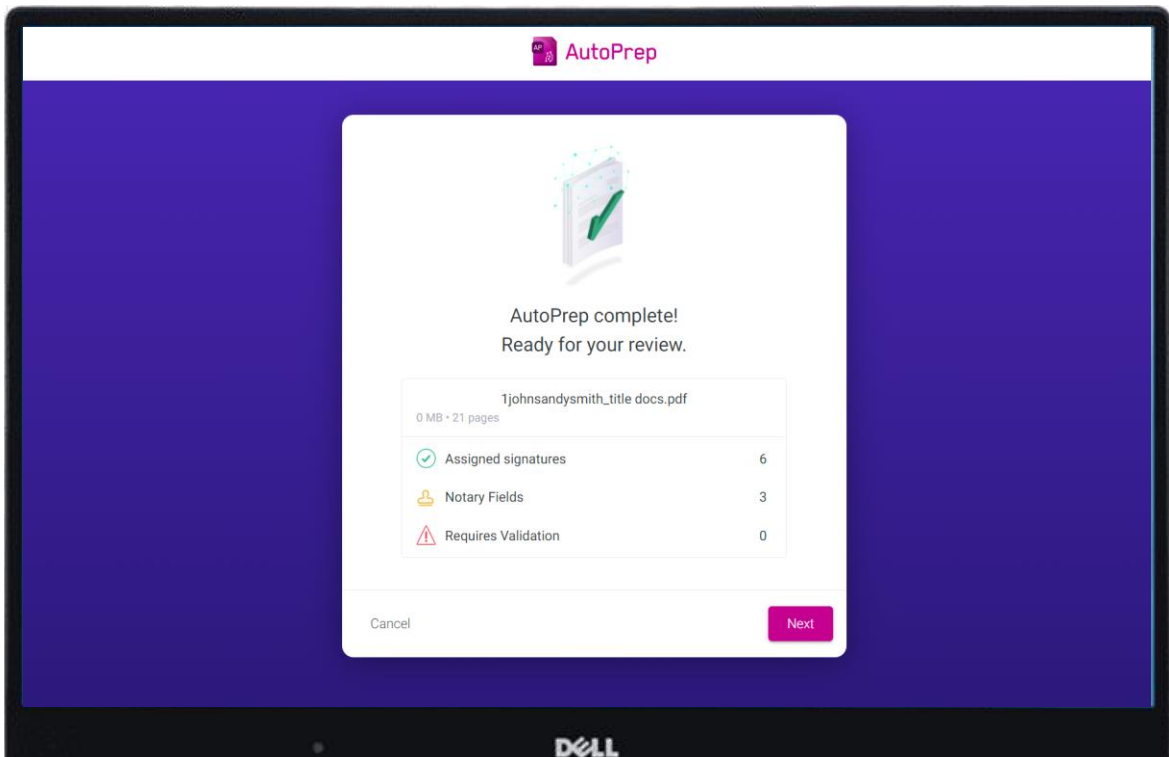
# AutoPrep™

AutoPrep™ = (Doc)MAGIC

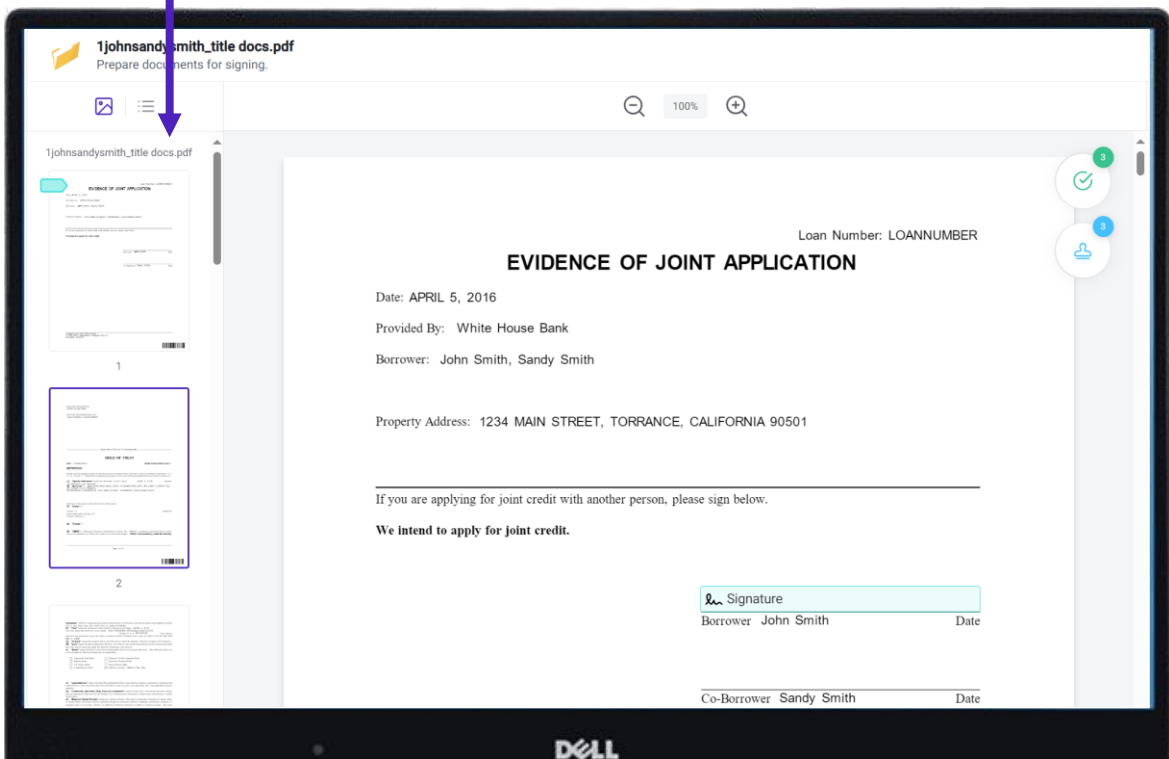
AutoPrep™ will use Optical Character Recognition (OCR) and A.I. to identify signatures lines for Borrowers and other participants including Notaries.



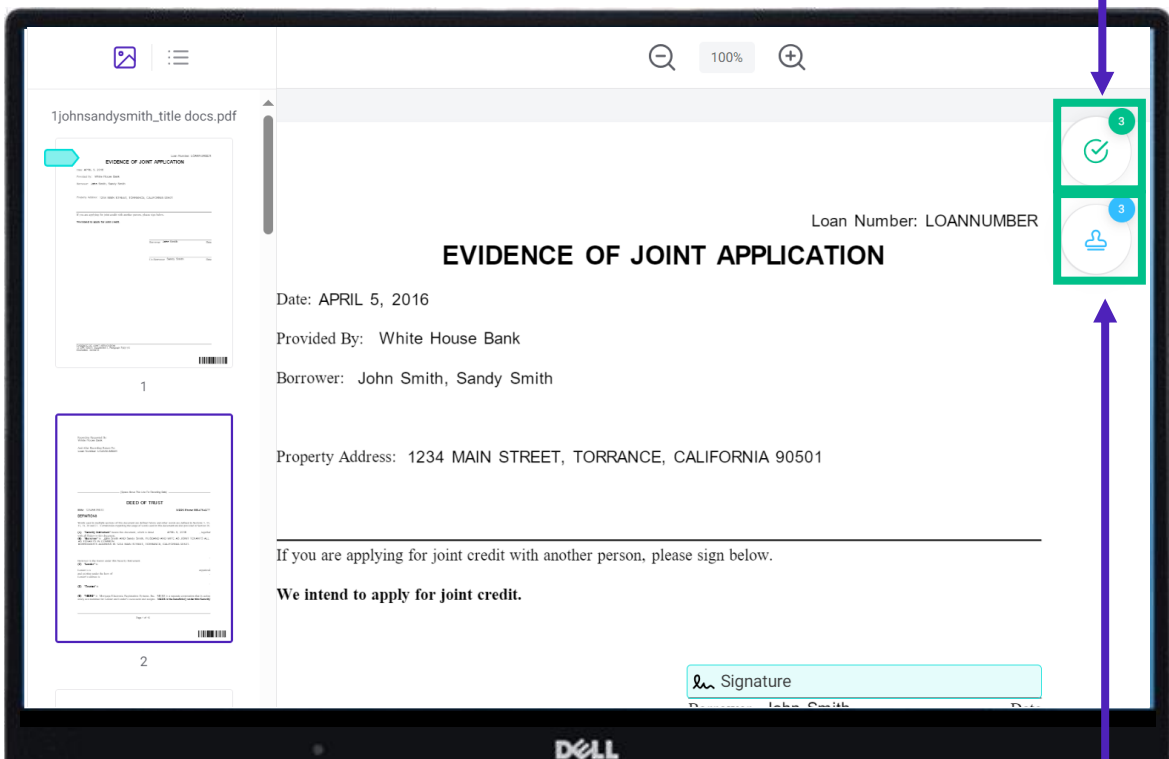
This screen will confirm the number of signatures, notary fields, and unassigned signatures found.



Next, you'll be brought to our [Document Editor](#). If you need to find a specific page on the document, you may scroll through the column on the left.



Click on the [green](#) circle with the *check mark* to jump to the next Participant tag. The number next to the circle tells you how many Participant tags are in this document package – 3 in this case.



Click on the [blue](#) circle with the *stamp* to jump to the next Notary tag. The number next to the circle tells you how many Notary tags are in this document package – 3 in this case.



## Adding Tags (Participants)

If you need to add something that must be filled out by a borrower, you can do that in PostFill. Click the little arrow to expand the list of options.

Loan Number: LOANNUMBER

### EVIDENCE OF JOINT APPLICATION

Date: APRIL 5, 2016  
Provided By: White House Bank  
Borrower: John Smith, Sandy Smith  
Property Address: 1234 MAIN STREET, TORRANCE, CALIFORNIA 90501

If you are applying for joint credit with another person, please sign below.

**We intend to apply for joint credit.**

Signature	Date
Borrower John Smith	
Co-Borrower Sandy Smith	

Tags: PostFill, Textbox, Phone Number, Date, Checkbox, Radio, Notary

Click and drag the item you want (Textbox in this case) to your desired spot.





When you let go of the mouse, you'll be asked to Select a signer.

The screenshot displays the 'EVIDENCE OF JOINT APPLICATION' form. The form includes fields for Date (APRIL 5, 2016), Provided By (White House Bank), Borrower (John Smith, Sandy Smith), and Property Address (1234 MAIN STREET, TORRANCE, CALIFORNIA 90501). A warning icon (a red triangle with an exclamation mark) is highlighted with a green box. To the right, a dropdown menu labeled 'Assigned to' is also highlighted with a green box, showing 'Select a signer' and a 'Required' checkbox. The form also features signature lines for Borrower (John Smith) and Co-Borrower (Sandy Smith), with an 'Unassigned' text box highlighted in light blue. A 'Delete' button is visible at the bottom right.

This warning triangle will appear – it is because you have an Unassigned text box. *If AutoPrep detects a signature field, but can't link it with a signer, you may also see this icon.*



## Adding Tags (Participants)

Here's what that looks like after you select a Signer. Checking the Required box means that the signer can't proceed unless they fill it out.

The screenshot displays a document titled "EVIDENCE OF JOINT APPLICATION" with the following details:

- Loan Number: LOANNUMBER
- Date: APRIL 5, 2016
- Provided By: White House Bank
- Borrower: John Smith, Sandy Smith
- Property Address: 1234 MAIN STREET, TORRANCE, CALIFORNIA 90501

Below the document content, there are two signature fields:

- Borrower:** John Smith, Date
- Co-Borrower:** Sandy Smith, Date

The interface includes a sidebar on the right with a "Textbox" tag icon. The "Assigned to" dropdown is set to "JOHN SMITH", and the "Required" checkbox is checked. A "Delete" button is visible at the bottom of the sidebar.

You'll notice that the warning triangle is gone, and that the Textbox no longer says Unassigned.

Please be careful not to assign borrower tags on notary documents and vice versa. This can cause confusion and delays during the signing experience.



## Selecting and Moving a Tag

Click on an editable tag at any time to select it. You'll know that the tag is selected when you see those circles on the four corners of the tag.

The screenshot displays a document titled "EVIDENCE OF JOINT APPLICATION" with the following details:

- Loan Number: LOANNUMBER
- Date: APRIL 5, 2016
- Provided By: White House Bank
- Borrower: John Smith, Sandy Smith
- Property Address: 1234 MAIN STREET, TORRANCE, CALIFORNIA 90501

Below the document content, there are two signature lines:

- Borrower:** John Smith (with a "Signature" label and "Date" field)
- Co-Borrower:** Sandy Smith (with a "Date" field)

A light blue "Textbox" tag is selected, indicated by small circles at its corners. The tag contains the text "Co-Borrower Sandy Smith". A blue arrow points from the text box above to the selected tag. On the right side of the interface, a sidebar shows "Assigned to" as "JOHN SMITH" and a "Required" checkbox checked. A "Delete" button is visible at the bottom right of the sidebar.

You can move it around to your desired location by clicking and dragging it with the mouse. You can also change the dimensions by dragging the dots on the corners.



## Deleting a Tag

To delete a tag that you added, click Delete or press backspace or delete on your keyboard.

The screenshot displays a document titled "EVIDENCE OF JOINT APPLICATION" with a loan number "LOANNUMBER". The document includes the following information:

- Date: APRIL 5, 2016
- Provided By: White House Bank
- Borrower: John Smith, Sandy Smith
- Property Address: 1234 MAIN STREET, TORRANCE, CALIFORNIA 90501

Below the address, there is a section for joint credit applications:

If you are applying for joint credit with another person, please sign below.

**We intend to apply for joint credit.**

There are two signature fields:

- Signature:** Borrower John Smith, Date
- Textbox:** Co-Borrower Sandy Smith, Date

The right sidebar shows the document's metadata:

- Assigned to: JOHN SMITH
- Required:

A red "Delete" button is highlighted in the bottom right corner of the sidebar, with a green box around it and a blue arrow pointing to it from the instruction box above.



It's important to remember that during the signing experience, you can no longer edit a document after it's been signed. You can still edit if no signatures have been applied.

The screenshot shows a document titled "EVIDENCE OF JOINT APPLICATION" with the following details:

- Loan Number: LOANNUMBER
- Date: APRIL 5, 2016
- Provided By: White House Bank
- Borrower: John Smith, Sandy Smith
- Property Address: 1234 MAIN STREET, TORRANCE, CALIFORNIA 90501

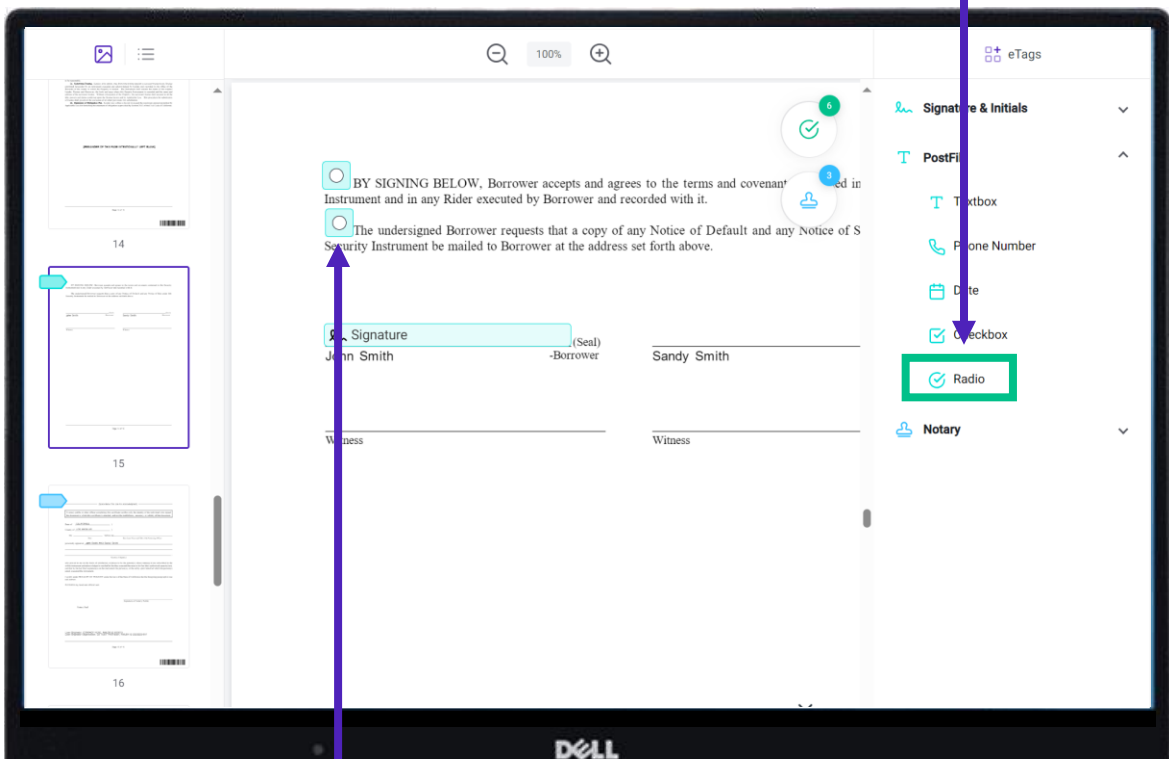
Below the address, there is a line for a signature and a "Signature" label. Underneath, it says "Borrower John Smith" and "Date". Below that is a "Textbox" label and "Co-Borrower Sandy Smith" and "Date". A blue arrow points to the "Textbox" label.

On the right side, there is a sidebar with "Assigned to" set to "JOHN SMITH" and a "Required" checkbox checked. At the bottom right, there is a "Delete" button.

If you added this textbox, make sure it's filled out before any signatures are applied.



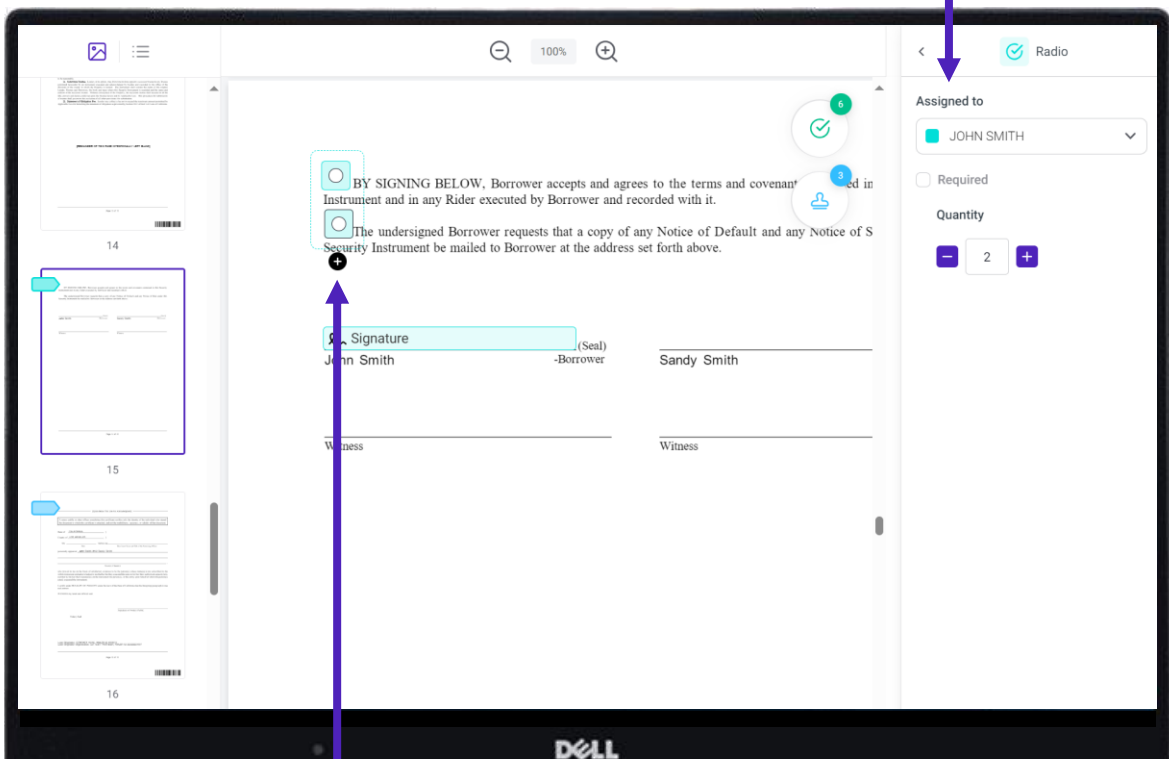
If you need a participant to pick one option from several – like they're answering a multiple-choice test question – choose Radio from Postfill.



Drag and drop to your desired location, like any other tag.



On the right column, you can assign the radio buttons to a participant, toggle whether it's required, and change the quantity of options.



You also add additional options by clicking here.



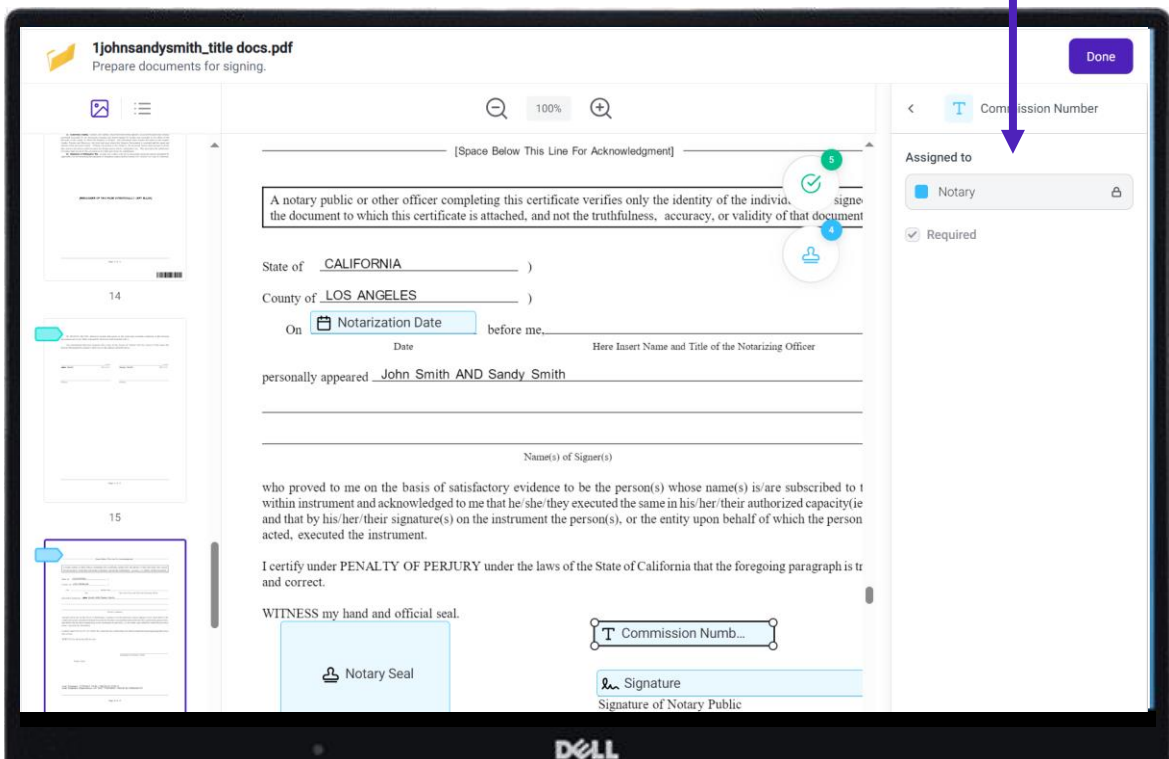
If you need to add something for the Notary, make sure to grab it from the Notary section.

The screenshot displays the AutoPrep software interface for a document titled "1Johnsandysmith\_title docs.pdf". The main workspace shows a notary form with fields for State (CALIFORNIA), County (LOS ANGELES), and Notarization Date. A "Notary Seal" tag is visible in the bottom left, and a "Signature" tag is in the bottom right. On the right side, a "Notary" tag menu is open, listing various tags such as Signature, Notary Name, Notary Title, Commission Number, Commission Expiration, Notary Seal, Notarization/Closing County, Notarization/Closing State, Notarization Date, Personally Appeared, Signing Date, and RON Regulatory Language. A blue arrow points from the text box above to the "Notary" tag menu.





If you choose a tag from the Notary section, it will be required, and you won't be able to assign it to anyone else.



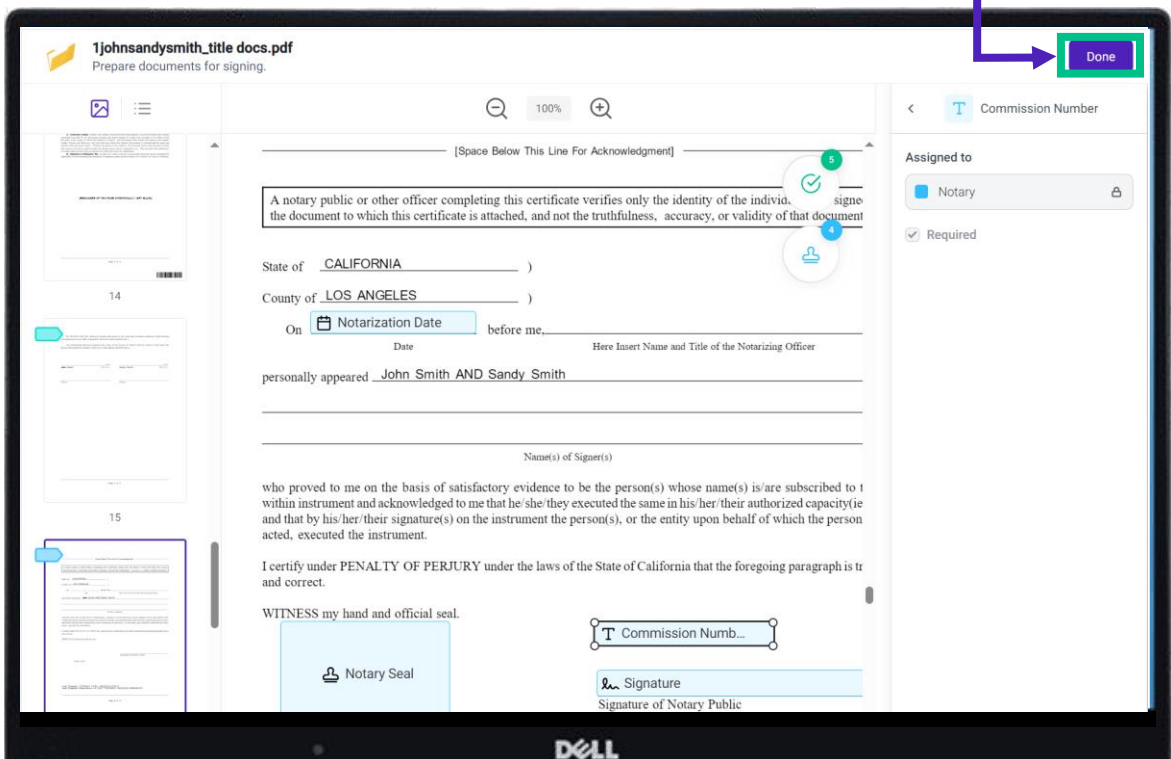
Similarly, if you grab a non-Notary tag, you won't be able to assign it to a Notary.



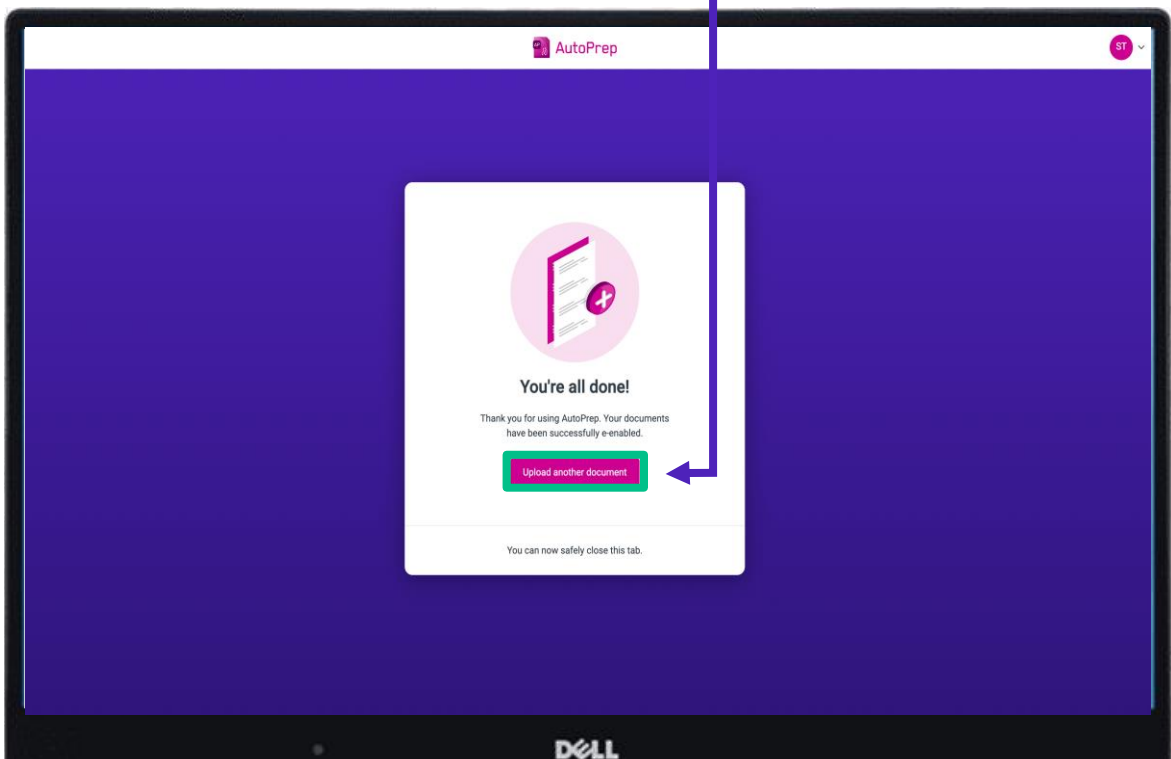
# AutoPrep™

Click Done When Complete

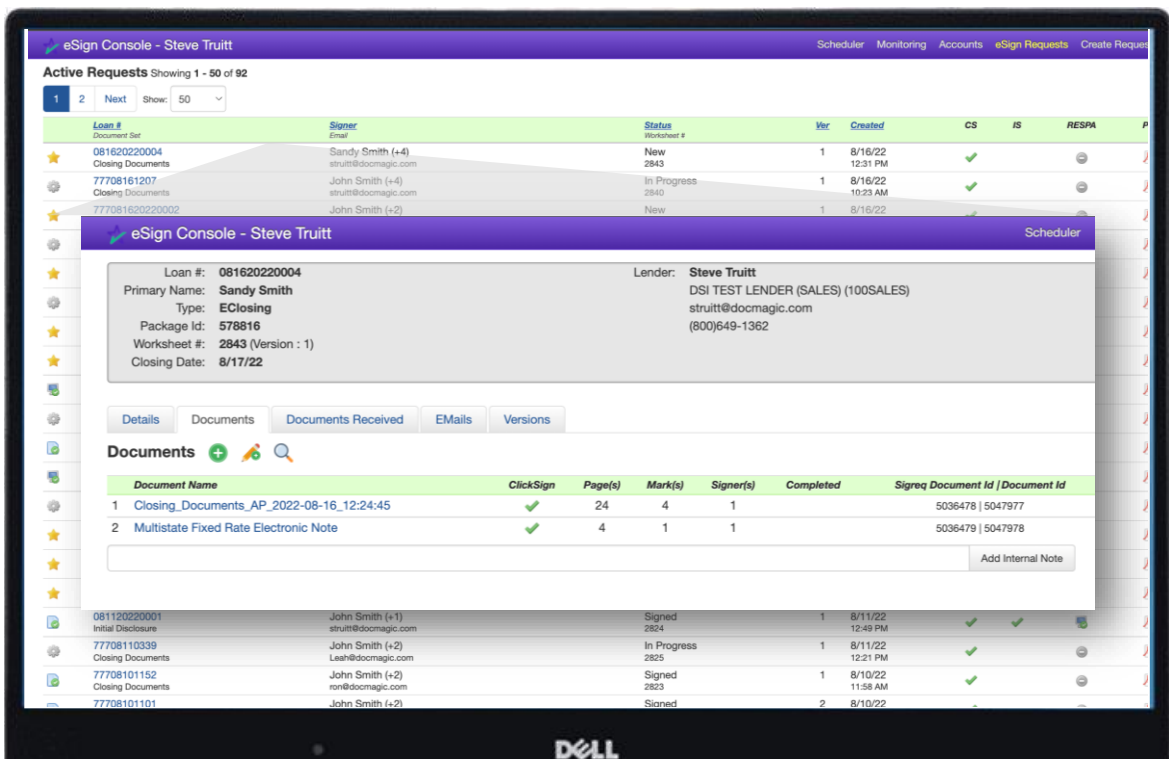
When you're satisfied with the tags, click Done.



If you want to upload another document, click here. Otherwise, close the tab



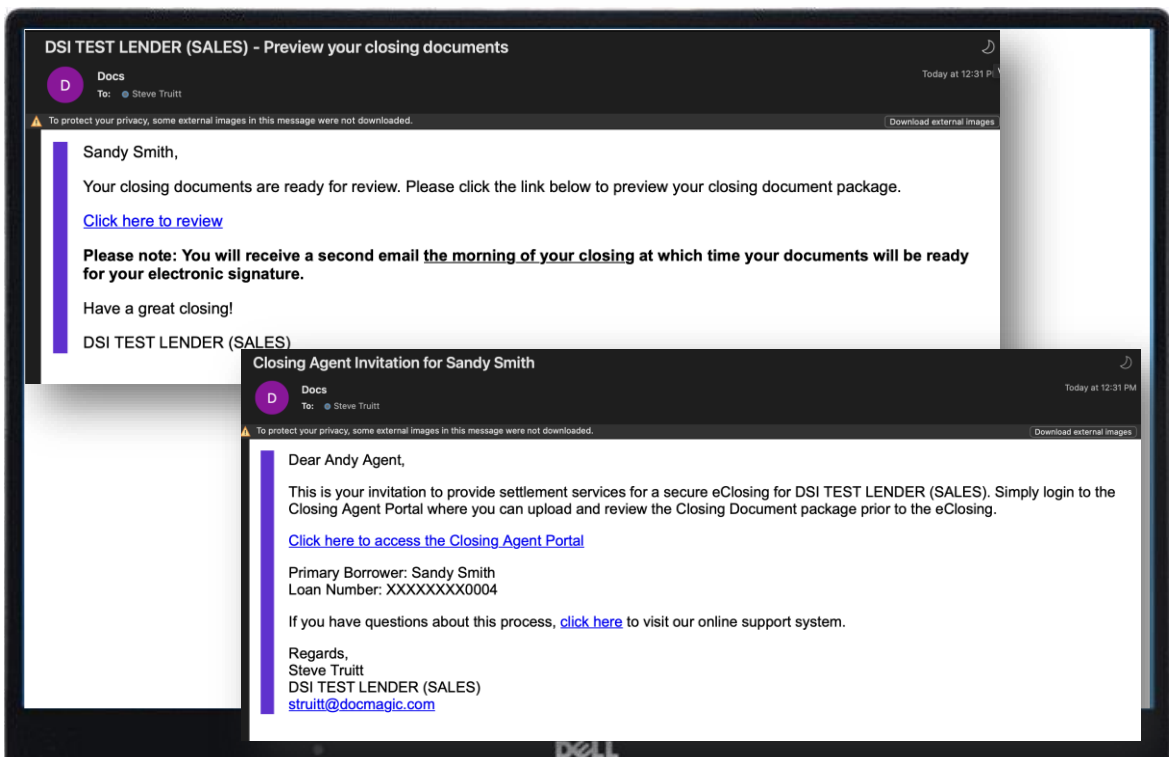
The AutoPrep™ – prepared loan will now be listed in your eSign Console on your dashboard.



For additional information on how to use our eSign Console, please visit our [Product Training Page](#).



eSign email notifications will be sent to the participants, including the Settlement Agent and any additional signers.



# AutoPrep™ – Settlement Agent

## Settlement Agent

The rest of this guide will focus on using AutoPrep™ from the Settlement Agent portal. Many of the functions are the same as before.

**DocMagic eClose Console (Settlement Agent)** Sally ▾

**LOAN** Loan #: 777-1616630796081  
Primary Borrower: Erica Sample  
Type: EClosing  
Package ID: 333727  
Worksheet #: 1616630796081 (Version: 1)

**LENDER**  
Company: DSI TEST LENDER (SALES)  
Contact: Michael Morford  
Email: mikem@docmagic.com  
Phone: (800) 649-1362

**COUNTDOWN TO CLOSING**  
DAYS: 0 HOURS: 6 MINUTES: 51 SECONDS: 26  
Date: Mar 25, 2021 (Thu) Time: 12:00am PDT

Details Action Log Ready to Close

**Signers (2)** Assign Notary

#	Signer Name / Email	Role	Notary Name / Email	Notary Type / Closing Date - Time	KBA / Status	ID Verify / Status	Status	eSign
1	Erica Sample erica.sample@example.c...	Borrower	Notary_name_placehold... NOTARY_EMAIL_PLACE...	3/25/2021 - 12:00am	✉ ○	📄 ○	● Not Started	Open Signing Room
2	Sally Settlement sally.settlement@examp...	Settlement Agent	Unassigned				● Ready to Sign	Open Signing Room

**Documents (15)** Preview Mode

#	eSign Enabled	Page(s)	Signer(s)	Completed
1	Uniform Residential Loan Application	9	1	✓
2	MERS California Deed of Trust	16	2	✓
3	Specific Closing Instructions	3	2	✓
4	California Hazard Insurance Disclosure	1	1	✓
5	Hazard Insurance Authorization and Requirements	2	1	✓
6	Borrower Consent to the Use of Tax Return Information	1	1	✓

For more information about the Settlement Agent Portal, please visit our [Product Training Page](#).



# AutoPrep™ – Settlement Agent

## Uploading a File

When you need to add a document to the stack that requires signatures, click on the page icon below to upload it.

The screenshot displays the DocMagic Settlement Agent interface. At the top, it shows 'DocMagic eClose Console (Settlement Agent)' and the user 'Sally'. The main area is divided into sections: 'LOAN' (Loan #: 777-1616630796081, Primary Borrower: Erica Sample, Title: EClosing, Package ID: 333727, Worksheet #: 1616630796081 (Version: 1)), 'LENDER' (Company: DSI TEST LENDER (SALES), Contact: Michael Morford, Email: mikem@docmagic.com, Phone: (800) 649-1362), and 'COUNTDOWN TO CLOSING' (Days: 0, Hours: 6, Minutes: 51, Seconds: 26, Date: Mar 25, 2021 (Thu), Time: 12:00am PDT). Below these are 'Details' and 'Action Log' tabs. The 'Signers (2)' section lists Erica Sample and Sally Settlement. The 'Documents (15)' section contains a table of documents. A blue arrow points from the text above to the 'Add Document' icon (a document with a plus sign) in the 'Documents (15)' section. An 'Upload a new document' dialog box is open, showing a 'Document:' field, a 'Browse' button, and 'Cancel' and 'Submit' buttons. The 'Documents (15)' table is as follows:

#	eSign Enabled	Page(s)	Signer(s)	Completed
1	Uniform Residential Loan Application	9	1	✓
2	MERS California Deed of Trust	16	2	✓
3	Specific Closing Instructions	3	2	✓
4	California Hazard Insurance Disclosure	1	1	✓
5	Hazard Insurance Authorization and Requirements	2	1	✓
6	Borrower Consent to the Use of Tax Return Information	1	1	✓

Any file you upload to the Documents section will automatically trigger AutoPrep™.



# AutoPrep™ – Settlement Agent

## Uploading a File

Click the Browse button to navigate to the document you would like to add to the package.

The screenshot displays the DocMagic eClose Console interface. The top navigation bar includes the DocMagic logo, the text "eClose Console (Settlement Agent)", and a user profile for "Sally". The main content area is divided into several sections: "LOAN" with details like "Loan #: 777-1616630796081" and "Primary Borrower: Erica Sample"; "LENDER" with "Company: DSI TEST LENDER (SALES)" and "Contact: Michael Morford"; and a "COUNTDOWN TO CLOSING" section showing "0" days, "6" hours, "51" minutes, and "26" seconds. A "Ready to Close" button is visible. Below these are "Assign Notary" and "eSign" buttons, along with "Open Signing Room" buttons. A table at the bottom shows a list of documents with columns for "Signed" and "Completed".

An "Open" file explorer window is overlaid on the console, showing the "This PC > Desktop" path. The file list includes:

Name	Date modified	Type	Size
WVN	8/6/2020 3:06 PM	File folder	
61G1jC9qPL_AC_SL1000.jpg	8/25/2020 9:30 AM	JPG File	72 KB
ad_users.csv - Shortcut	1/13/2020 12:59 PM	Shortcut	2 KB
Adobe Connect	11/17/2017 1:04 PM	Shortcut	1 KB
appraisal.pdf	4/22/2019 11:51 A...	Adobe Acrobat D...	737 KB
articulate-360.exe	5/17/2019 2:54 PM	Application	85,422 KB
AutoprepDocs.zip	11/8/2019 2:25 PM	Compressed (zipp...	3,106 KB
<b>AZACPRS.TTL.pdf</b>	<b>6/19/2018 9:29 AM</b>	<b>Adobe Acrobat D...</b>	<b>109 KB</b>
Cisco Webex Meetings	7/9/2020 10:57 AM	Shortcut	3 KB
DMO Script.docx	10/29/2020 7:13 A...	Microsoft Word D...	36 KB
DocMagic - Chrome	9/8/2020 3:49 PM	Shortcut	3 KB
DocMagic eSign Demo.pptx	5/7/2019 3:57 PM	Microsoft PowerPo...	5,786 KB
DocMagic Intranet	1/30/2020 1:18 PM	Internet Shortcut	1 KB
DocMagic Online	12/16/2020 7:59 A...	Shortcut	3 KB

The file explorer window shows the file name "AZACPRS.TTL.pdf" and the file type "All Files (\*.\*)". The "Open" button is highlighted. A green box in the console interface highlights the "Browse" button, which is linked to the file explorer window.

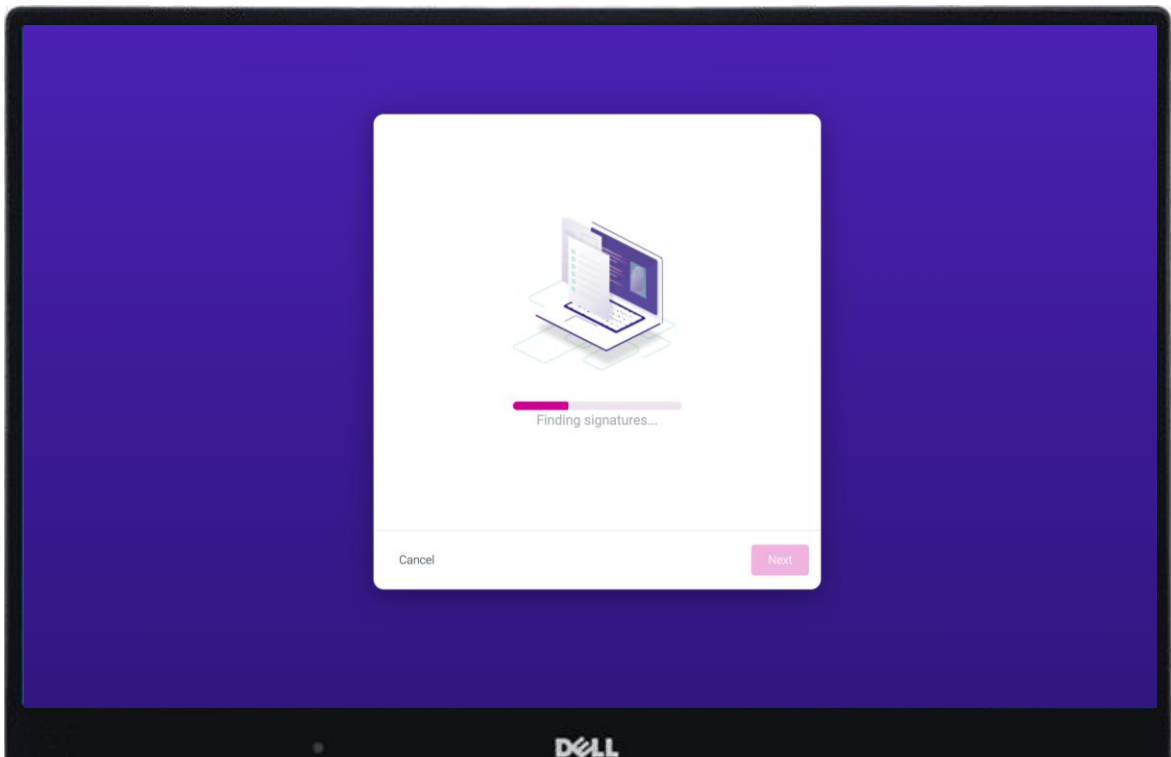




# AutoPrep™ – Settlement Agent

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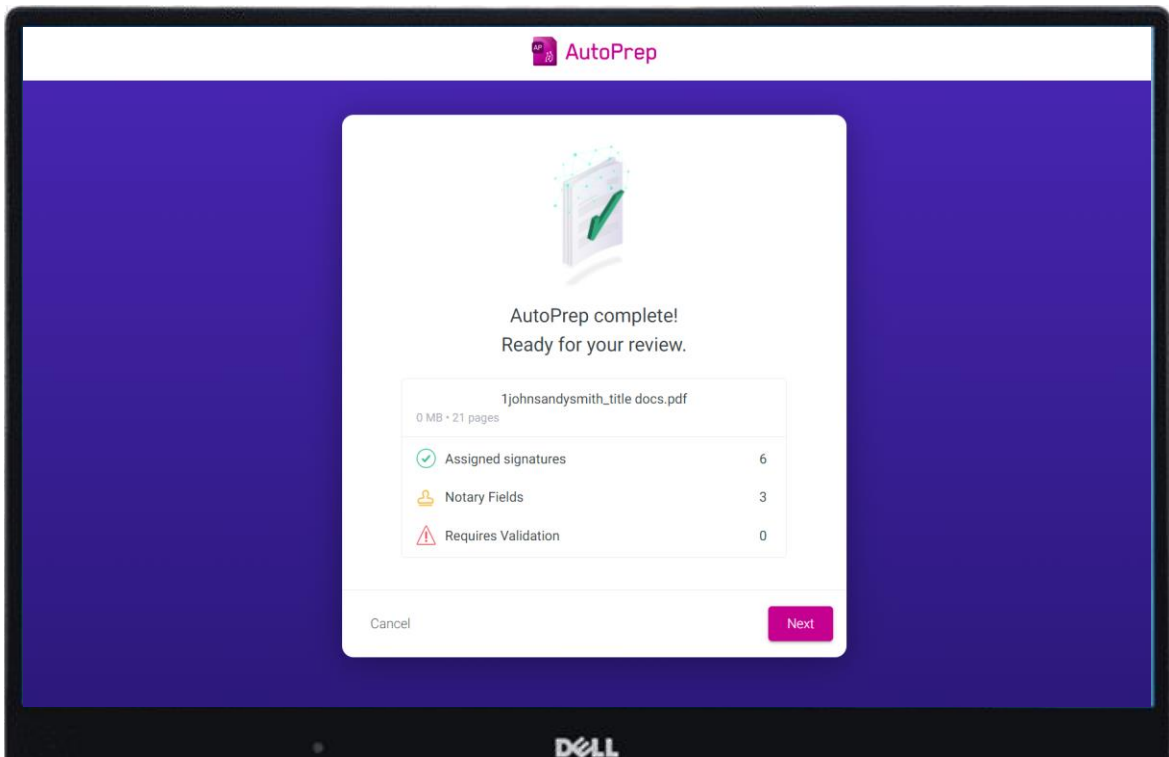
AutoPrep™ will use Optical Character Recognition (OCR) and A.I. to identify signatures lines for Borrowers and other participants including Notaries.



# AutoPrep™ – Settlement Agent

## Document Pre-Review

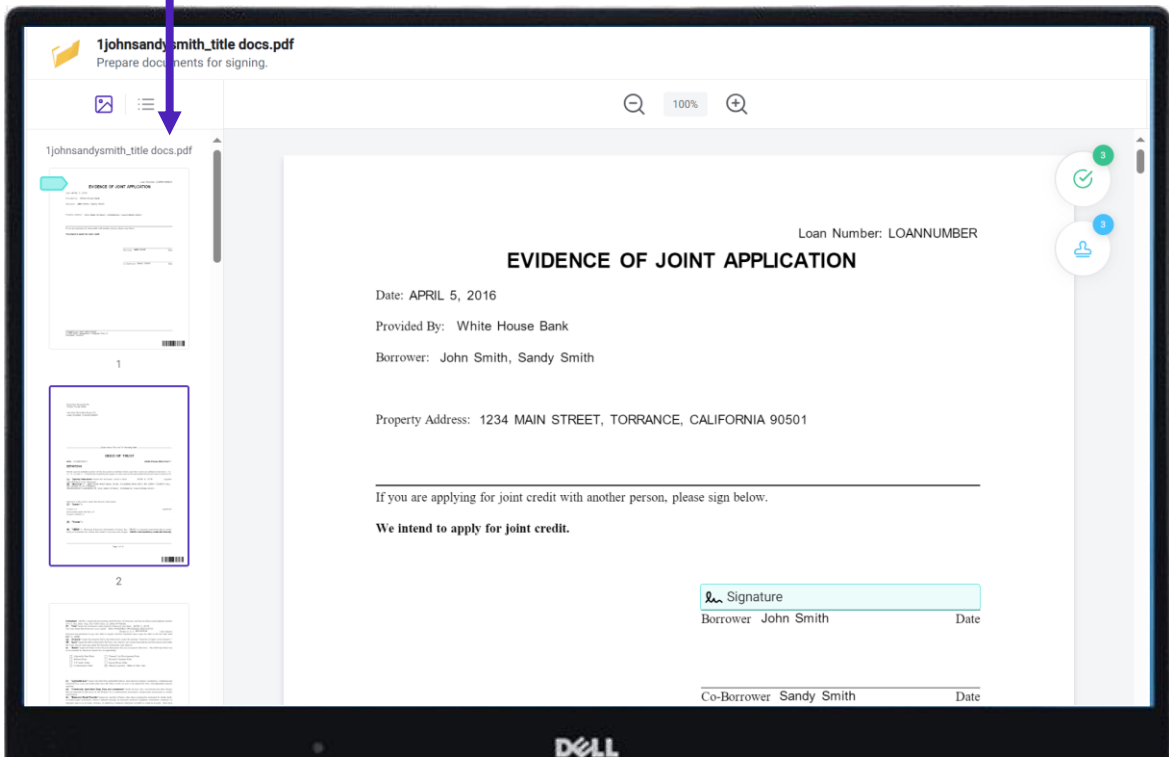
This screen will confirm the number of signatures, notary fields, and unassigned signatures found.



# AutoPrep™ – Settlement Agent

## Document Editor

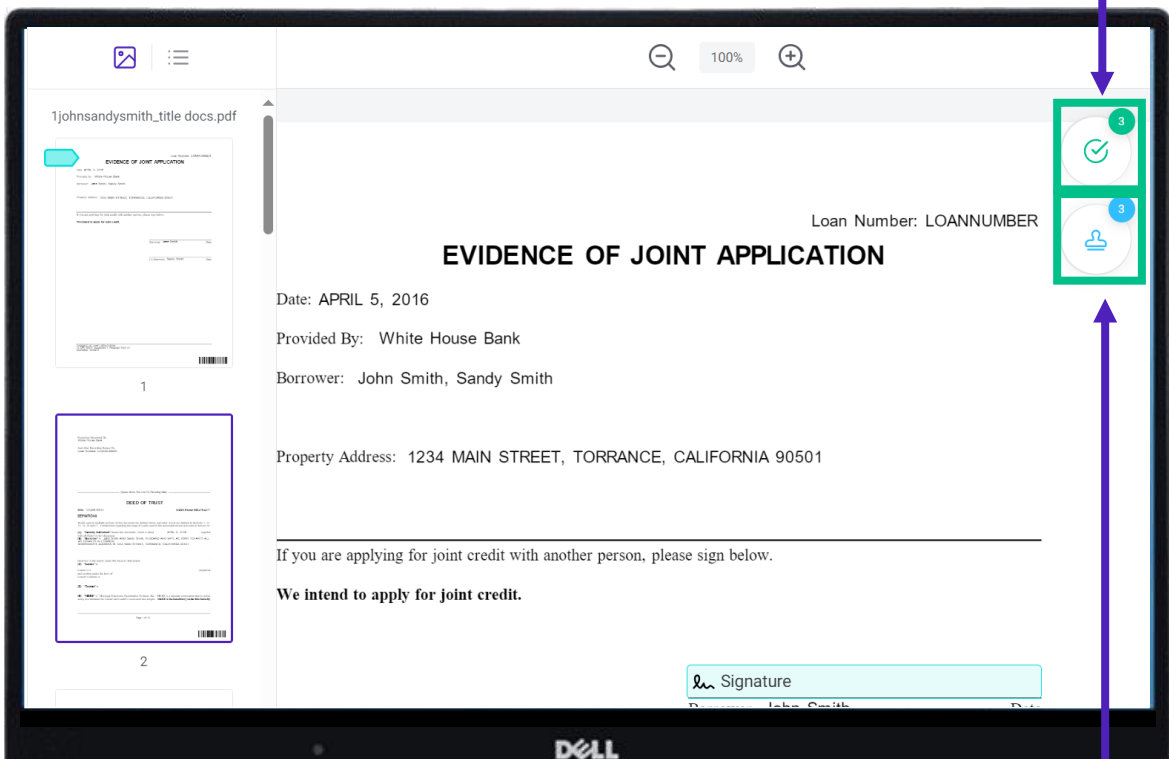
Next, you'll be brought to our [Document Editor](#). If you need to find a specific page on the document, you may scroll through the column on the left.



# AutoPrep™ – Settlement Agent

## Participant vs Notary Tag

Click on the [green](#) circle with the *check mark* to jump to the next Participant tag. The number next to the circle tells you how many Participant tags are in this document package – 3 in this case.



Click on the [blue](#) circle with the *stamp* to jump to the next Notary tag. The number next to the circle tells you how many Notary tags are in this document package – 3 in this case.



# AutoPrep™ – Settlement Agent

## Adding Tags (Participants)

If you need to add something that must be filled out by a borrower, you can do that in PostFill. Click the little arrow to expand the list of options.

The screenshot displays the 'EVIDENCE OF JOINT APPLICATION' form. The form includes fields for Date (APRIL 5, 2016), Provided By (White House Bank), Borrower (John Smith, Sandy Smith), and Property Address (1234 MAIN STREET, TORRANCE, CALIFORNIA 90501). A section for signatures is visible, with fields for Borrower (John Smith) and Co-Borrower (Sandy Smith), each with a Date field. A 'Text Unassigned' tag is highlighted in a green box in the signature field. The right-hand sidebar shows a tag menu with 'PostFill' and 'Textbox' highlighted in green boxes. Arrows indicate the process of selecting a tag from the menu and applying it to the form.

Click and drag the item you want (Textbox in this case) to your desired spot.



# AutoPrep™ – Settlement Agent

## Adding Tags (Participants)

When you let go of the mouse, you'll be asked to Select a signer.

The screenshot displays the 'EVIDENCE OF JOINT APPLICATION' form. The form includes fields for Date (APRIL 5, 2016), Provided By (White House Bank), Borrower (John Smith, Sandy Smith), and Property Address (1234 MAIN STREET, TORRANCE, CALIFORNIA 90501). A warning icon (a red triangle with an exclamation mark) is highlighted with a green box. To the right, a dropdown menu labeled 'Assigned to' is also highlighted with a green box, showing 'Select a signer' as the current selection. Below the form, there are signature fields for the Borrower (John Smith) and Co-Borrower (Sandy Smith), both currently marked as 'Unassigned'. A 'Delete' button is visible at the bottom right of the form area.

This warning triangle will appear – it is because you have an Unassigned text box. *If AutoPrep detects a signature field, but can't link it with a signer, you may also see this icon.*



# AutoPrep™ – Settlement Agent

## Adding Tags (Participants)

Here's what that looks like after you select a Signer. Checking the Required box means that the signer can't proceed unless they fill it out.

The screenshot displays a document titled "EVIDENCE OF JOINT APPLICATION" with the following details:

- Loan Number: LOANNUMBER
- Date: APRIL 5, 2016
- Provided By: White House Bank
- Borrower: John Smith, Sandy Smith
- Property Address: 1234 MAIN STREET, TORRANCE, CALIFORNIA 90501

The document includes a section for joint credit application with the text: "If you are applying for joint credit with another person, please sign below. We intend to apply for joint credit."

There are two signature lines:

- Borrower:** John Smith, Date
- Co-Borrower:** Sandy Smith, Date

The interface features a sidebar on the right with the following elements:

- Assigned to: JOHN SMITH (dropdown menu)
- Required:
- Delete button

A "Textbox" tag is highlighted on the Co-Borrower signature line, and a "Signature" tag is highlighted on the Borrower signature line. A warning triangle is no longer present on the Textbox tag.

You'll notice that the warning triangle is gone, and that the Textbox no longer says Unassigned.

Please be careful not to assign borrower tags on notary documents and vice versa. This can cause confusion and delays during the signing experience.



# AutoPrep™ – Settlement Agent

## Selecting and Moving a Tag

Click on an editable tag at any time to select it. You'll know that the tag is selected when you see those circles on the four corners of the tag.

The screenshot displays a document titled "EVIDENCE OF JOINT APPLICATION" with the following details:

- Loan Number: LOANNUMBER
- Date: APRIL 5, 2016
- Provided By: White House Bank
- Borrower: John Smith, Sandy Smith
- Property Address: 1234 MAIN STREET, TORRANCE, CALIFORNIA 90501

Below the address, there is a section for signatures:

If you are applying for joint credit with another person, please sign below.  
**We intend to apply for joint credit.**

The signature section includes two rows:

- Borrower:** John Smith (with a signature icon) and Date
- Co-Borrower:** Sandy Smith (with a signature icon) and Date

A light blue "Textbox" tag is positioned over the "Sandy Smith" text. The tag has small white circles at its four corners, indicating it is selected. A blue arrow points from the text box in the instruction above to this tag. To the right of the document, there is a sidebar with a "Assigned to" dropdown menu set to "JOHN SMITH" and a "Required" checkbox checked. A "Delete" button is visible at the bottom right of the sidebar.

You can move it around to your desired location by clicking and dragging it with the mouse. You can also change the dimensions by dragging the dots on the corners.





To delete a tag that you added, click Delete or press backspace or delete on your keyboard.

The screenshot displays a mobile application interface for document preparation. The main document area shows the following information:

- Loan Number: LOANNUMBER
- EVIDENCE OF JOINT APPLICATION**
- Date: APRIL 5, 2016
- Provided By: White House Bank
- Borrower: John Smith, Sandy Smith
- Property Address: 1234 MAIN STREET, TORRANCE, CALIFORNIA 90501

Below the address, there is a section for joint credit application with the text: "If you are applying for joint credit with another person, please sign below. We intend to apply for joint credit." This section contains two signature lines:

- Signature** (with a signature icon)
- Borrower: John Smith (with a Date field)
- Textbox** (with a text icon)
- Co-Borrower: Sandy Smith (with a Date field)

On the right side, a sidebar is open, showing a "Textbox" tag. The sidebar includes:

- Assigned to: JOHN SMITH (with a dropdown arrow)
- Required
- Delete** (with a trash icon, highlighted by a green box and a purple arrow from the instruction box)

At the top of the sidebar, there are three circular icons: a green checkmark with a '4', a blue person icon with a '3', and a blue document icon with a '3'. The bottom of the screen shows a "DELL" logo.



# AutoPrep™ – Settlement Agent

Fill Before You Sign!

It's important to remember that during the signing experience, you can no longer edit a document after it's been signed. You can still edit if no signatures have been applied.

The screenshot displays a digital document titled "EVIDENCE OF JOINT APPLICATION" with a loan number "LOANNUMBER". The document includes the following details:

- Date: APRIL 5, 2016
- Provided By: White House Bank
- Borrower: John Smith, Sandy Smith
- Property Address: 1234 MAIN STREET, TORRANCE, CALIFORNIA 90501

Below the address, there is a line for a signature and a "Textbox" field. The signature line is labeled "Signature" and includes fields for "Borrower" (John Smith) and "Date". The "Textbox" field is labeled "Textbox" and includes fields for "Co-Borrower" (Sandy Smith) and "Date". A blue arrow points to the "Textbox" field, indicating it should be filled out before signing.

On the right side of the interface, there is a sidebar with the following elements:

- Assigned to: JOHN SMITH (dropdown menu)
- Required (checkbox checked)
- Delete (trash icon)

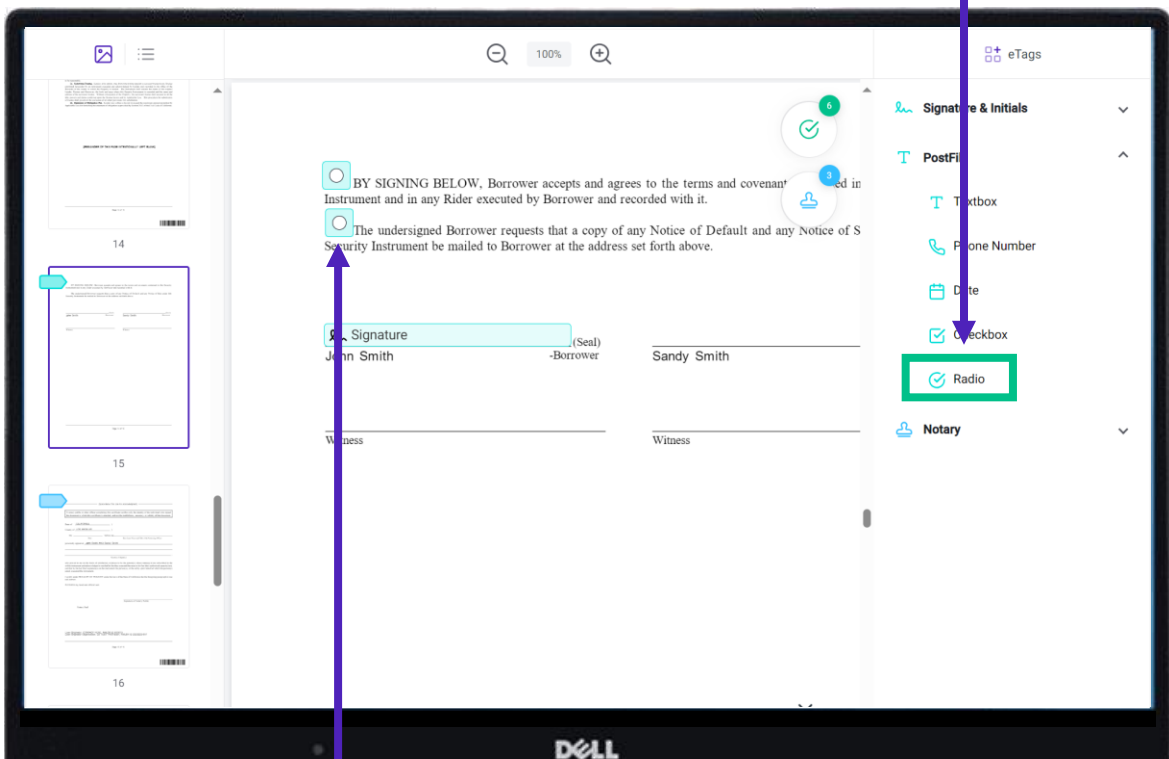
If you added this textbox, make sure it's filled out before any signatures are applied.



# AutoPrep™ – Settlement Agent

## Radio Buttons

If you need a participant to pick one option from several – like they're answering a multiple-choice test question – choose Radio from Postfill.



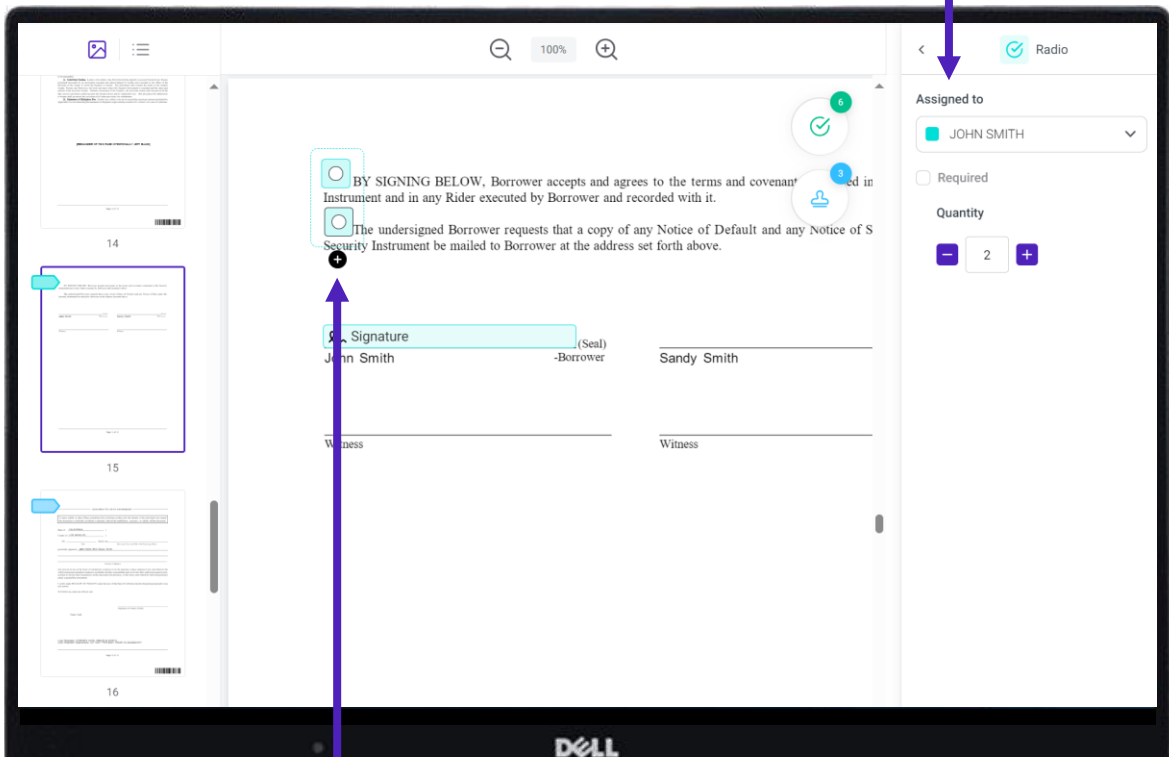
Drag and drop to your desired location, like any other tag.



# AutoPrep™ – Settlement Agent

## Radio Buttons

On the right column, you can assign the radio buttons to a participant, toggle whether it's required, and change the quantity of options.



You also add additional options by clicking here.



# AutoPrep™ – Settlement Agent

## Notary Tags

If you need to add something for the Notary, make sure to grab it from the Notary section.

1Johnsandysmith\_title docs.pdf  
Prepare documents for signing. Done

[Space Below This Line For Acknowledgment]

A notary public or other officer completing this certificate verifies only the identity of the individual who signed the document to which this certificate is attached, and not the truthfulness, accuracy, or validity of that document.

State of CALIFORNIA )  
County of LOS ANGELES )

On  before me, \_\_\_\_\_  
Date Here Insert Name and Title of the Notarizing Officer

personally appeared John Smith AND Sandy Smith

\_\_\_\_\_  
Name(s) of Signer(s)

who proved to me on the basis of satisfactory evidence to be the person(s) whose name(s) is/are subscribed to the within instrument and acknowledged to me that he/she/they executed the same in his/her/their authorized capacity(ies), and that by his/her/their signature(s) on the instrument the person(s), or the entity upon behalf of which the person(s) acted, executed the instrument.

I certify under PENALTY OF PERJURY under the laws of the State of California that the foregoing paragraph is true and correct.

WITNESS my hand and official seal.

**Notary**

- Signature
- Notary Name
- Notary Title
- Commission Number
- Commission Expiration
- Notary Seal
- Notarization/Closing County
- Notarization/Closing State
- Notarization Date
- Personally Appeared
- Signing Date
- RON Regulatory Language



# AutoPrep™ – Settlement Agent

## Notary Tags

If you choose a tag from the Notary section, it will be required, and you won't be able to assign it to anyone else.

The screenshot displays the AutoPrep software interface for a document titled "1Johnsandysmith\_title docs.pdf". The main area shows a notary form with fields for State of CALIFORNIA, County of LOS ANGELES, and Notarization Date. The form includes a section for the Notarizing Officer's name and title, and a section for the Notary Seal and Signature. A right-hand panel shows the "Assigned to" section with a "Notary" tag selected and a "Required" checkbox checked. A purple arrow points from the text box above to the "Notary" tag in the assignment panel.

Similarly, if you grab a non-Notary tag, you won't be able to assign it to a Notary.



# AutoPrep™ – Settlement Agent

Click Done When Complete

When you're satisfied with the tags, click Done.

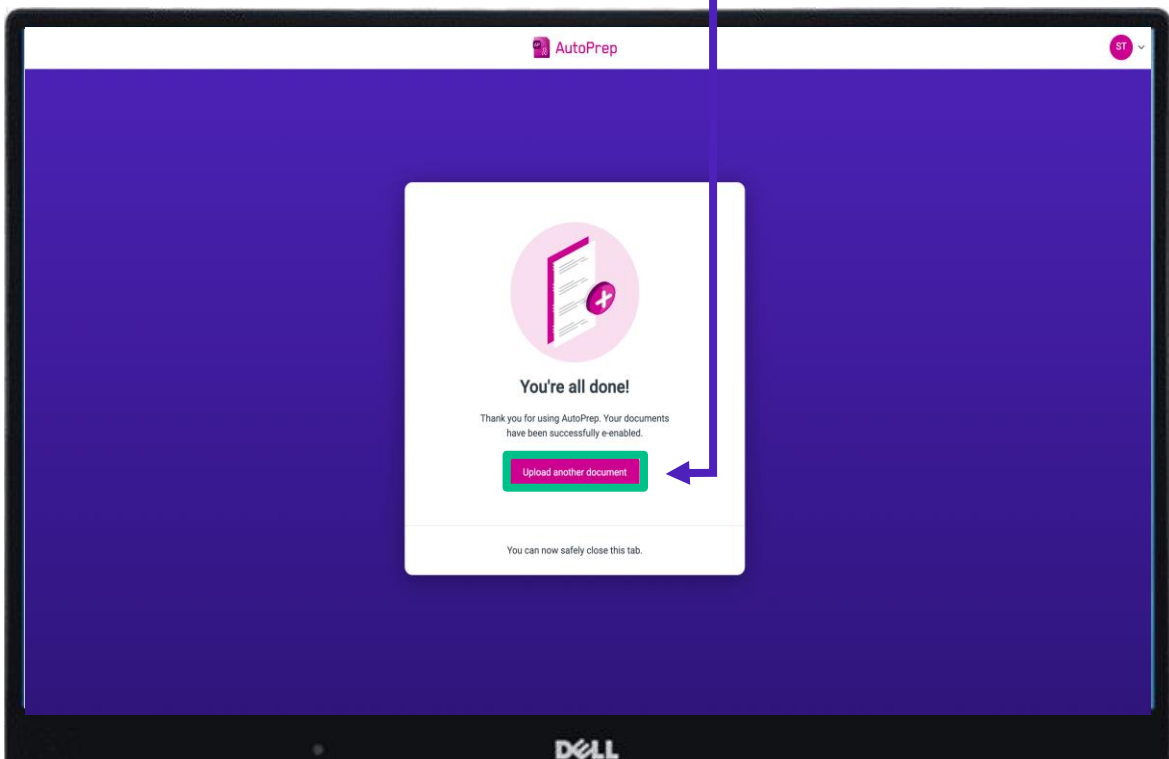
The screenshot displays the AutoPrep software interface for a document titled "1Johnsandysmith\_title docs.pdf". The document is a notary public certificate for California, Los Angeles County. The form includes fields for the State of CALIFORNIA, County of LOS ANGELES, and Notarization Date. The notary's name is listed as John Smith AND Sandy Smith. The document also contains a section for the Notary Seal and Signature, with a Commission Number field. A right-hand sidebar shows the document is assigned to a Notary and is required. A purple arrow points from the text "When you're satisfied with the tags, click Done." to a purple "Done" button in the top right corner of the software interface.



# AutoPrep™ – Settlement Agent

## Confirmation

If you want to upload another document, click here. Otherwise, close the tab and you'll be taken back to your Settlement Agent console.





# Additional Resources

## Product Training Page

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Let us help you get the most from DocMagic

- ▶ **Contact Us**  
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- ▶ **Live Chat**  
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- ▶ **Product Training**  
Get to know our products
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### Product Training

### Welcome to the DocMagic Product Training Page

We've assembled a library of videos, guidebooks and other materials that will provide you with the tools to successfully navigate our products, or those of our partners.

Scroll down to find the product or service you need help with and click on the icon to access that page.

Account Settings	Arive	AutoPrep	BytePro	Calyx Path
CalyxPoint	Compliance Tools	DigaSign	DocMagic Online	DocMaster
Encompass	eVault	LendingPad	LendingQB	LoanMagic
LoanProducer	MortgageBot	Mortgage Director	OpenClose	SmartCLOSE
SmartREGISTRY	Total eClose			

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