

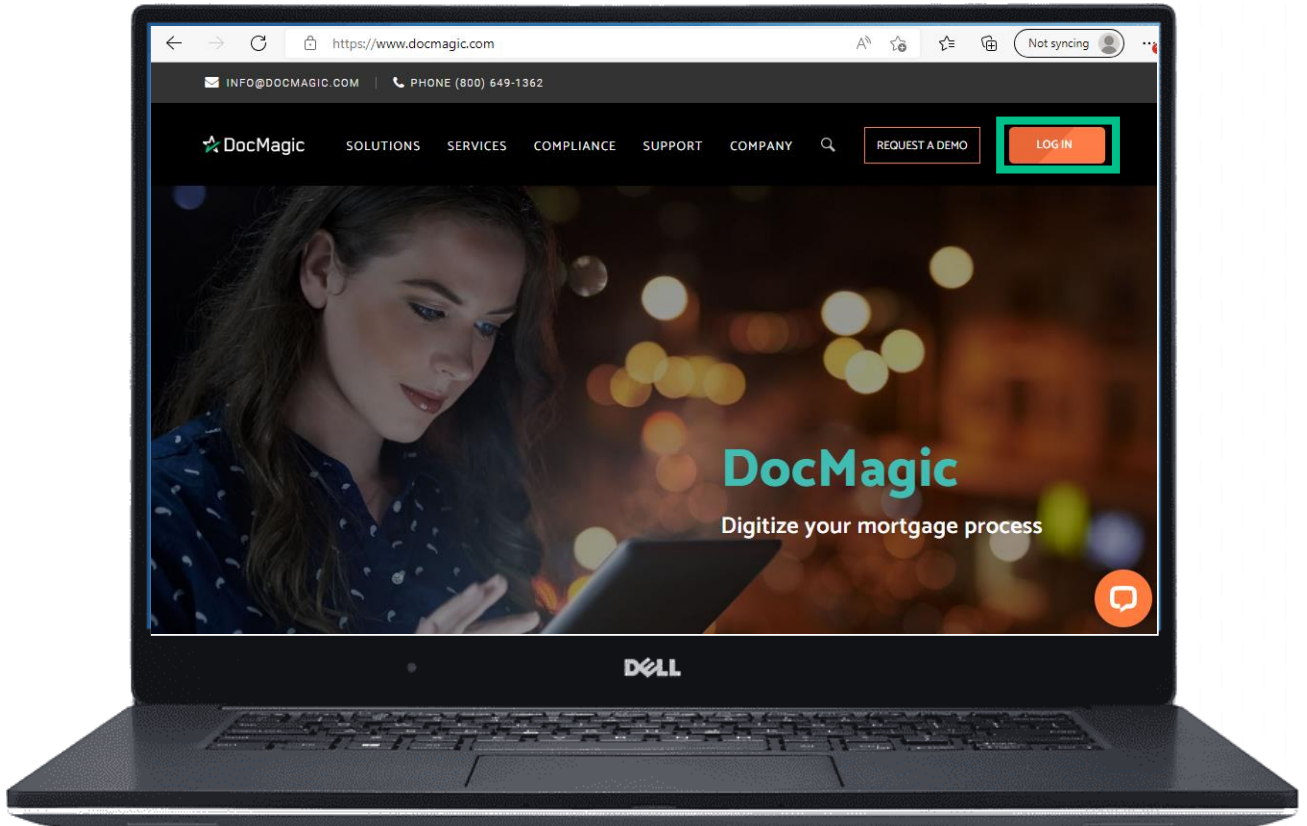


Creating a Custom eSign Request

Creating a Custom eSign Request

Getting to the eSign Console

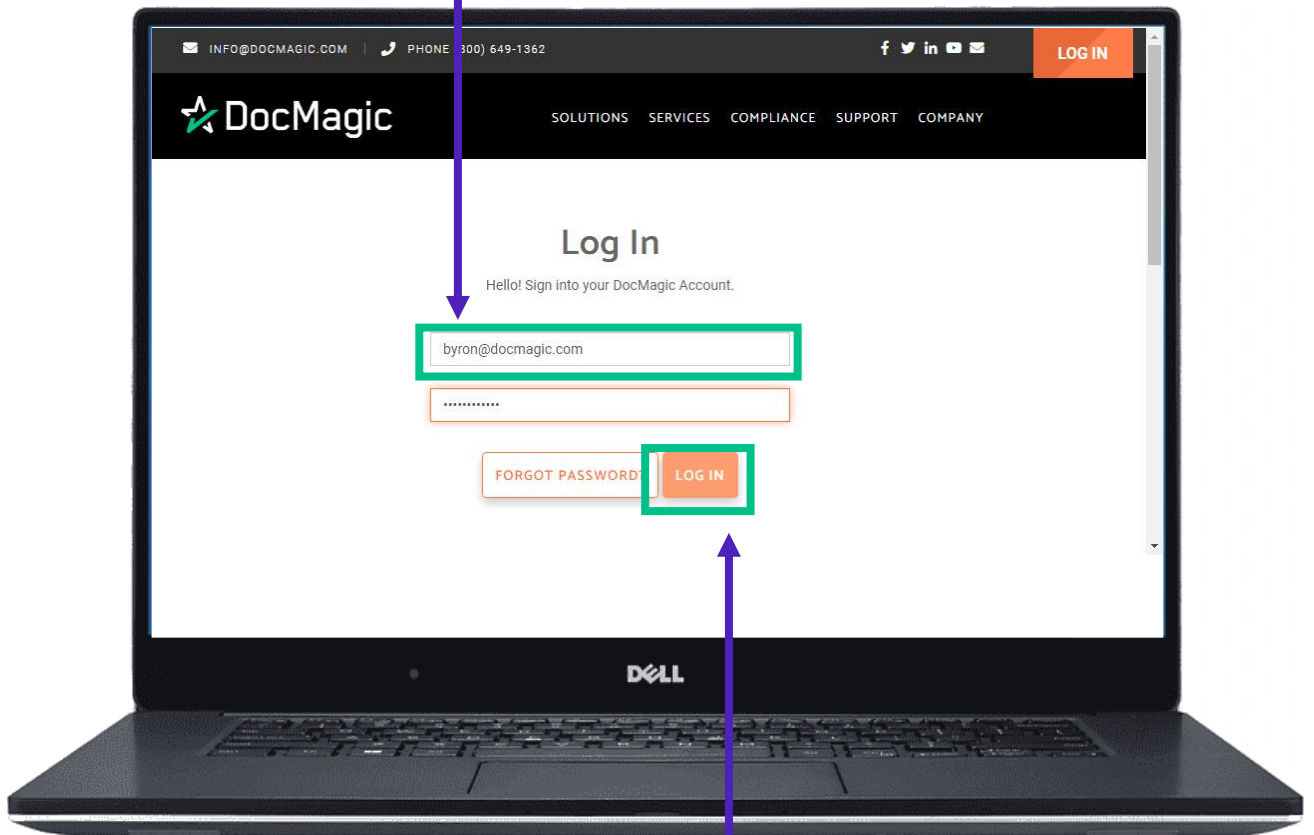
Go to www.docmagic.com



Creating a Custom eSign Request

Getting to the eSign Console

Login with your email and password.



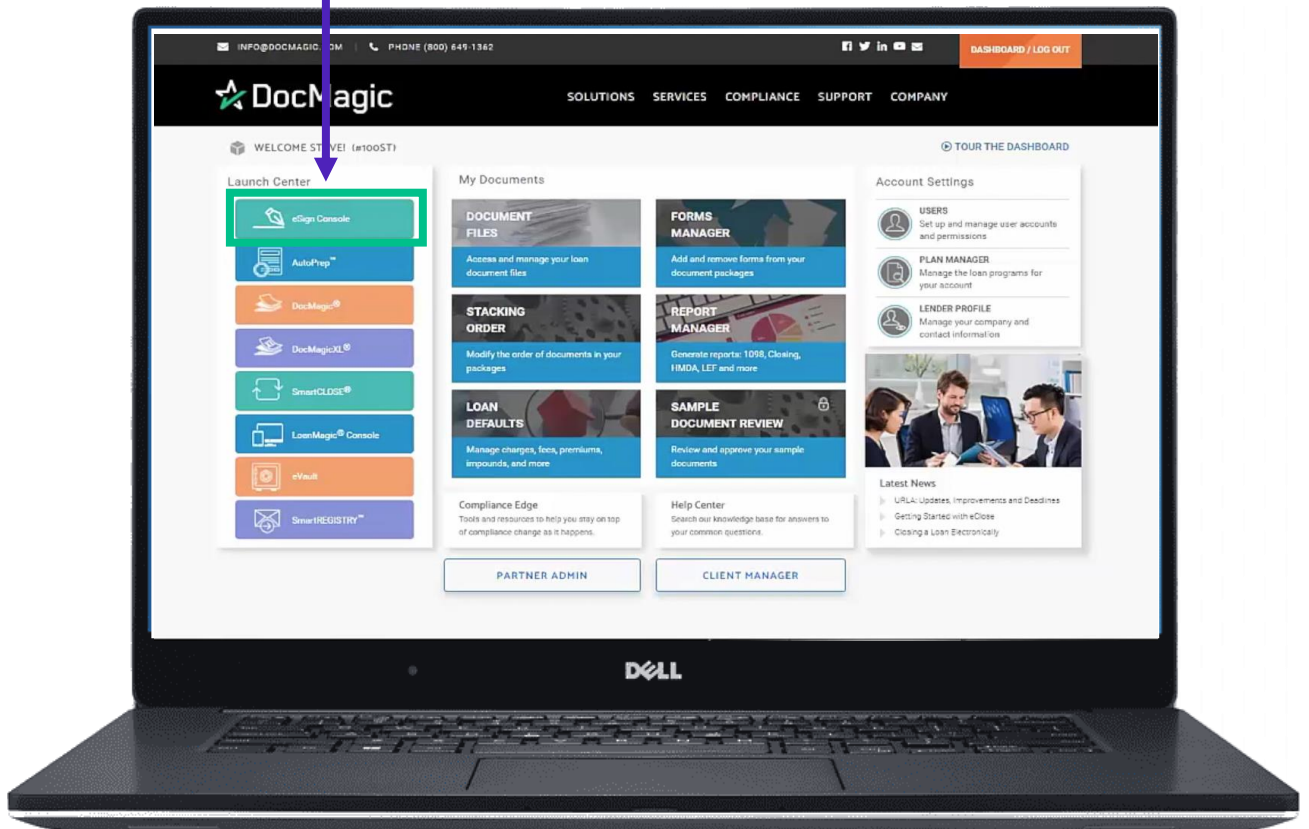
Click "LOG IN"



Creating a Custom eSign Request

Getting to the eSign Console

Select eSign Console from the dashboard.



Creating a Custom eSign Request

eSign Console

Click "Create Request" in the top right of the eSign Console to start a new application.

The screenshot displays the eSign Console interface for Steve Truitt. The top navigation bar includes links for Scheduler, Monitoring, Accounts, eSign Requests, and a highlighted 'Create Request' button. Below the navigation bar, the 'Active Requests' section shows a list of 29 requests. The table below provides a detailed view of these requests, including their status, creation date, and various compliance checkboxes.

Loan # Document Set	Signer Email	Status Worksheet #	Ver	Created	CS	IS	RESPA	PDF	Archive
777021320220002 Closing Documents	John Smith (+2) struitt@docmagic.com	Signed 3153	1	2/13/23 3:28 PM	✓		⊖	📄	🗄️
0213202300001 Closing Documents	John Smith (+2) aland@docmagic.com	New 3152	2	2/13/23 11:13 AM	✓		⊖	📄	🗄️
77702091427 Closing Documents	John Smith (+2) struitt@docmagic.com	In Progress 3151	1	2/9/23 12:29 PM	✓	✓	⊖	📄	🗄️
02082023 Closing Documents	Susan Sample SusanSample@example.com	Signed 02082023	1	2/8/23 11:42 AM	✓		⊖	📄	🗄️
1675884726831 Closing Documents	1675884726831 Sample (+1) 1675884726831@example.com	Signed 1675884726831	1	2/8/23 11:32 AM	✓		⊖	📄	🗄️
020720220001 Closing Documents	John Smith (+1) struitt@docmagic.com	Consented 3144	2	2/7/23 9:48 AM	✓	✓	⊖	📄	🗄️
777020620220001 Closing Documents	John Smith (+2) aland@docmagic.com	In Progress 3147	1	2/6/23 11:27 AM	✓	✓	⊖	📄	🗄️
1675352850673 Loan Application	Hassan Sample (+1) hassan.sample@example.com	New 1675352850673	1	2/2/23 7:47 AM	✓	✓	⊖	📄	🗄️
777020220220003 Closing Documents	John Smith (+2) aland@docmagic.com	In Progress 3145	1	2/1/23 4:22 PM	✓		⊖	📄	🗄️
1675293772697 Closing Documents	1675293772697 Sample (+1) 1675293772697@example.com	Signed 1675293772697	1	2/1/23 3:22 PM	✓		⊖	📄	🗄️
2023013101 Enote Documents	Megan Sample (+1) sample.987987987@example.com	In Progress 2023013101	1	2/1/23 3:11 PM	✓		⊖	📄	🗄️
777013020220001 Initial Disclosure	John Smith (+1) struitt@docmagic.com	Signed 3142	1	1/30/23 10:55 AM	✓	✓	📄	📄	🗄️
7770127202200011 Closing Documents	John Smith (+3) aland@docmagic.com	Signed 3140	1	1/27/23 9:09 AM	✓		⊖	📄	🗄️

The status of every document you have sent out will be present in the eSign Console.



Creating a Custom eSign Request

Signers

Add the email and name of the signer.

The screenshot displays the 'eSign Console - Steve Truitt' interface. The 'To: (Signers)' section is highlighted with a green box, containing the email 'aland@docmagic.com' and the name 'John Smith'. The 'From: (You)' section shows 'struitt@docmagic.com' and 'Steve Truitt'. The 'Documents' section has an 'Attach' button and a 'Prepare your document' button. The 'Subject' and 'Message' fields are optional. At the bottom, there is a checkbox for 'I have read and agree to the Terms of Use.' and buttons for 'Clear', 'Save', and 'Cancel'.

***From:** (You)
struitt@docmagic.com
Steve Middle Truitt Suffix

To: (Signers)
aland@docmagic.com
John Middle Smith Suffix Code
Add/Remove Signers - +

***Documents:**
Attach Prepare your document
Add/Remove Documents - +

Subject: optional
Optional

Message: optional
Optional

I have read and agree to the [Terms of Use.](#)

Clear Save Cancel



Creating a Custom eSign Request

Signers

You can create a code for the singer to log in with.

The screenshot shows the 'eSign Console - Steve Truitt' interface. The 'Create Request' form is displayed with the following fields and controls:

- *From: (You)**: strutt@docmagic.com, Steve, Middle, Trutt, Suffix. Includes a checkbox for 'I am the signer'.
- To: (Signers)**: aland@docmagic.com, John, Middle, Smith, Suffix, Code. Includes an 'Add/Remove Signers' button with '-' and '+' icons.
- *Documents:** Attach, Prepare your document, Add/Remove Documents (-, +).
- Subject:** Optional.
- Message:** Optional.
- Footer: I have read and agree to the [Terms of Use](#). Clear, Save, Cancel buttons.

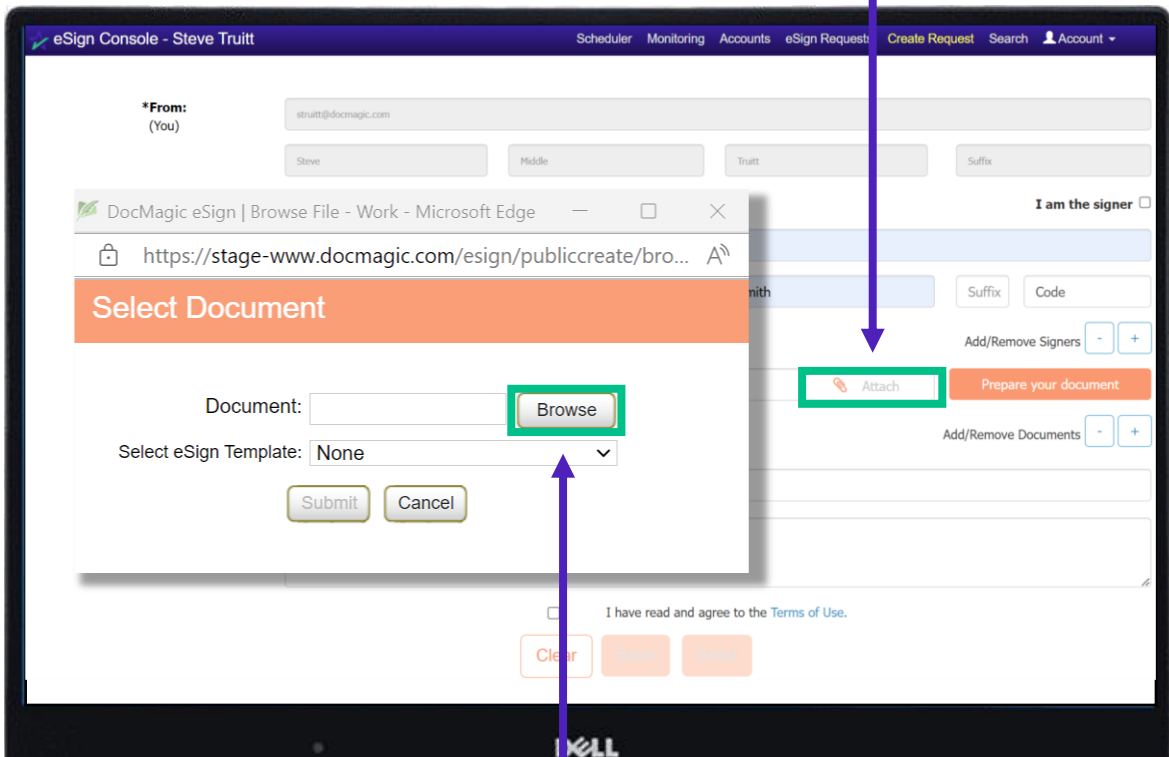
If you have multiple signers, you can add or remove them here.



Creating a Custom eSign Request

Documents

To upload a document, click Attach.



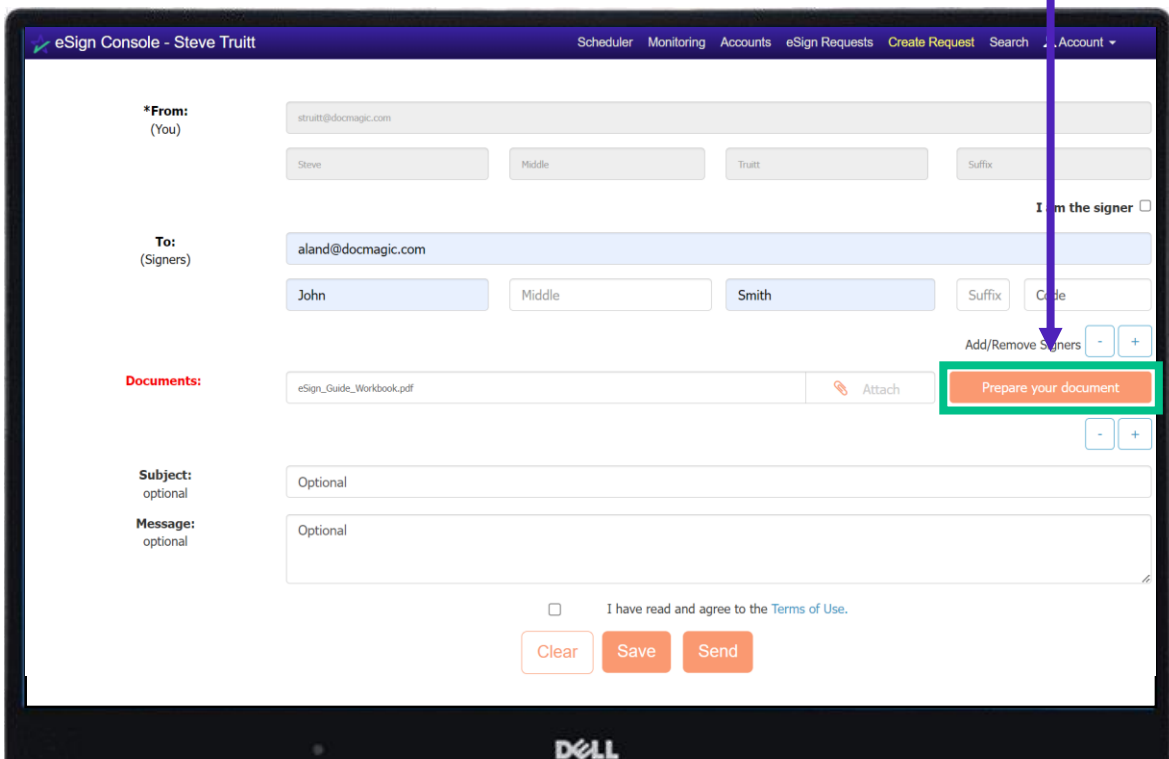
A separate window will appear. Click Browse to select a document to upload.



Creating a Custom eSign Request

Prepare Your Document

After uploading your document, choose Prepare your document.



The screenshot displays the 'eSign Console - Steve Truitt' interface. The top navigation bar includes 'Scheduler', 'Monitoring', 'Accounts', 'eSign Requests', 'Create Request', 'Search', and 'Account'. The main form is divided into several sections:

- *From: (You)**: Contains the email 'strutt@docmagic.com' and name fields for 'Steve', 'Middle', 'Trutt', and 'Suffix'. There is a checkbox for 'I am the signer'.
- To: (Signers)**: Contains the email 'aland@docmagic.com' and name fields for 'John', 'Middle', 'Smith', 'Suffix', and 'Code'. There are minus and plus buttons for 'Add/Remove Signers'.
- Documents:**: Contains a document field with 'eSign_Guide_Workbook.pdf', an 'Attach' button, and a 'Prepare your document' button (highlighted with a green box). There are minus and plus buttons below the document field.
- Subject:**: A text field with 'Optional'.
- Message:**: A text area with 'Optional'.

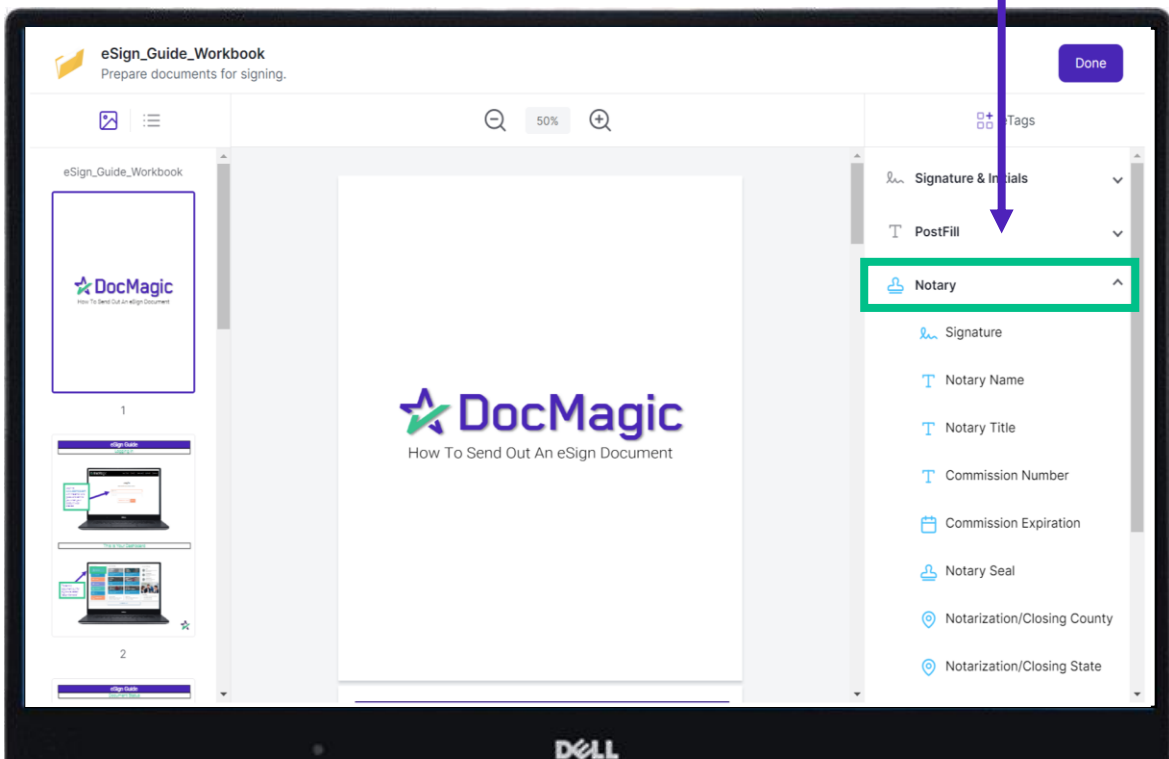
At the bottom, there is a checkbox for 'I have read and agree to the Terms of Use.' and three buttons: 'Clear', 'Save', and 'Send'. The Dell logo is visible at the bottom center of the monitor frame.



Creating a Custom eSign Request

Prepare Your Document

A separate window will appear. Start by clicking on a category to expand the list of options.



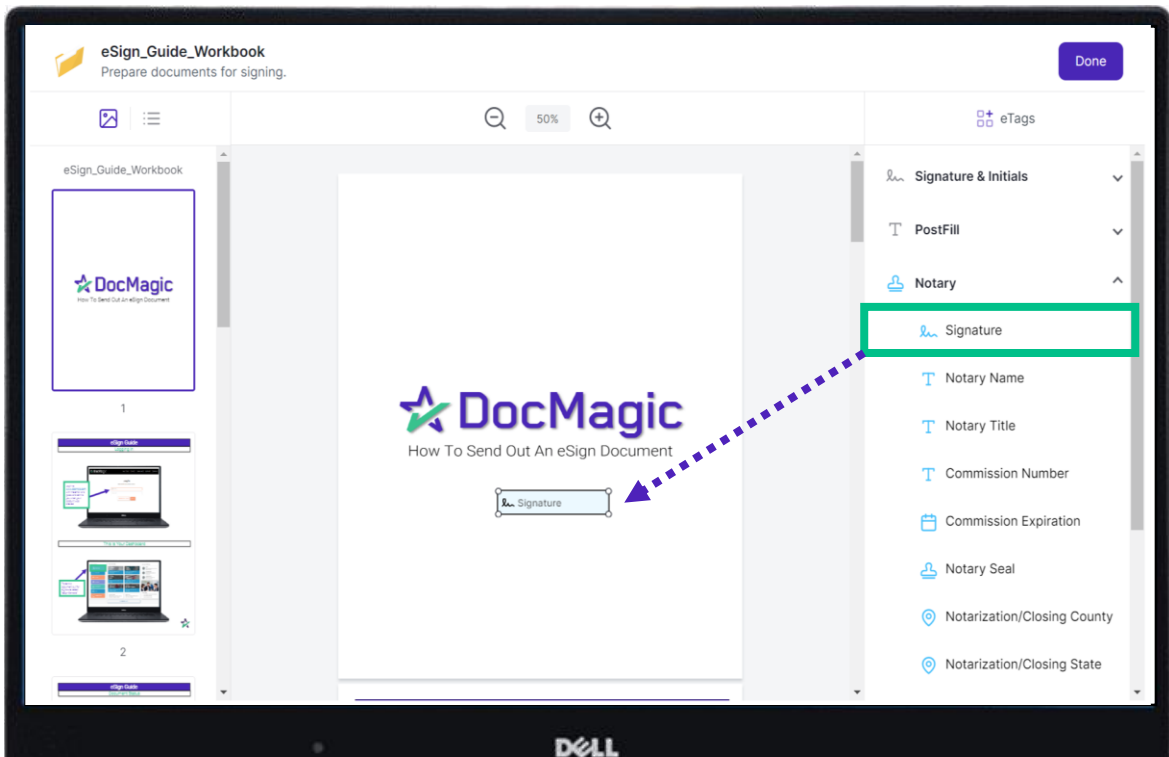
In this example, clicking Notary shows a list of notary related fields.



Creating a Custom eSign Request

Prepare Your Document

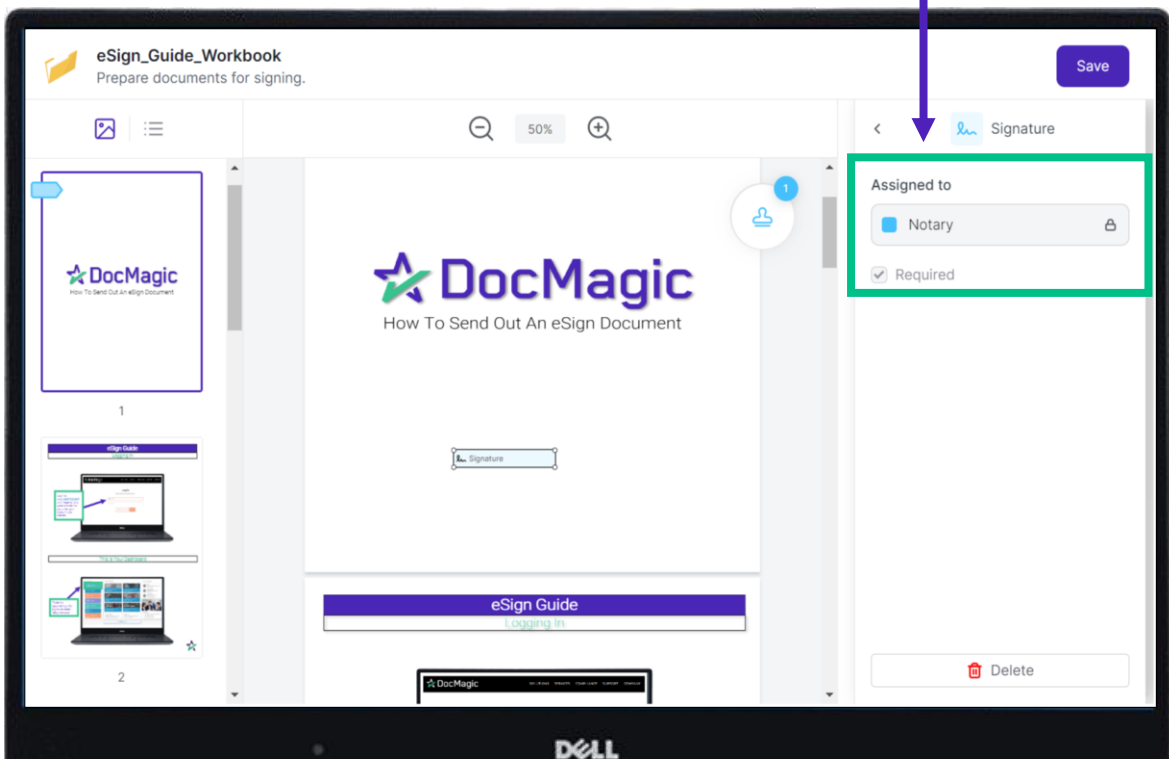
Select a field and then *drag* it to where you would like someone to sign or initial.



Creating a Custom eSign Request

Prepare Your Document

After you place a field, the right column shows you who it will be assigned to. Click on a field at any time to bring up this information column.



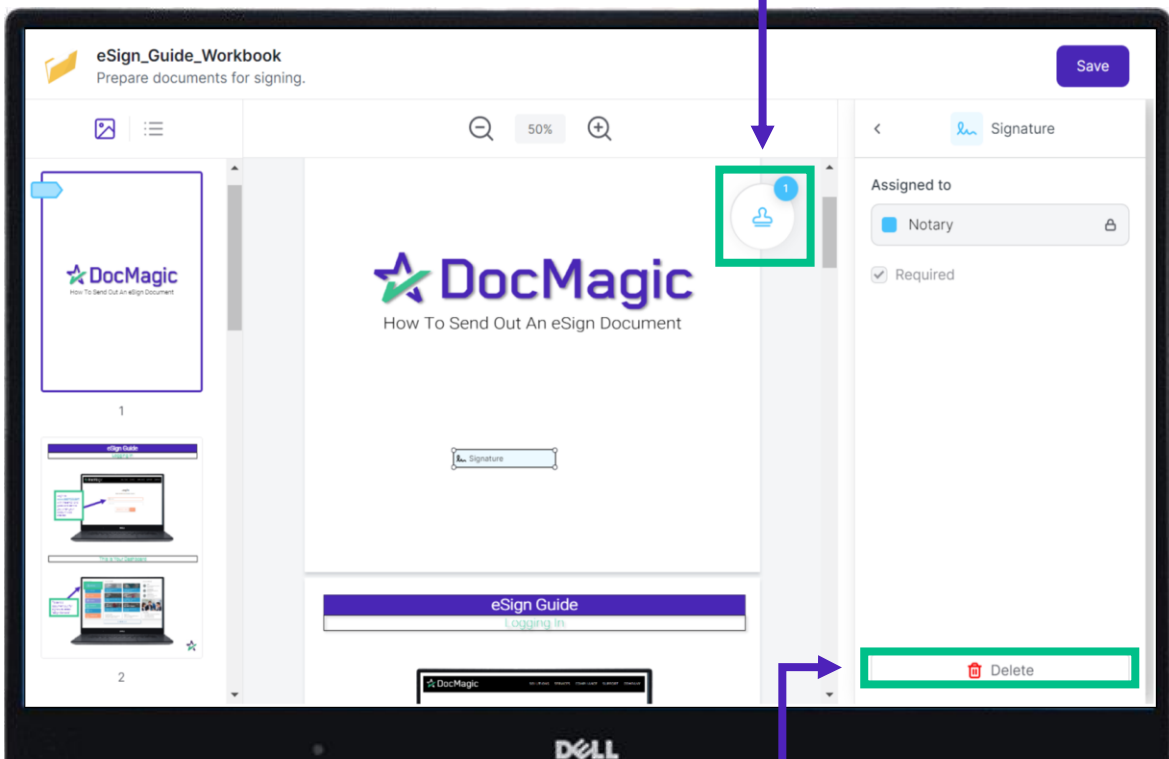
Since we selected a signature field from the Notary category, the field can only be assigned to the Notary (hence the locked symbol). In other cases, you can choose who a field is assigned to.



Creating a Custom eSign Request

Prepare Your Document

This little icon tells you that you have one notary field. Other icons will appear for other types of fields. Warnings – items that need to be addressed – will show up here too.



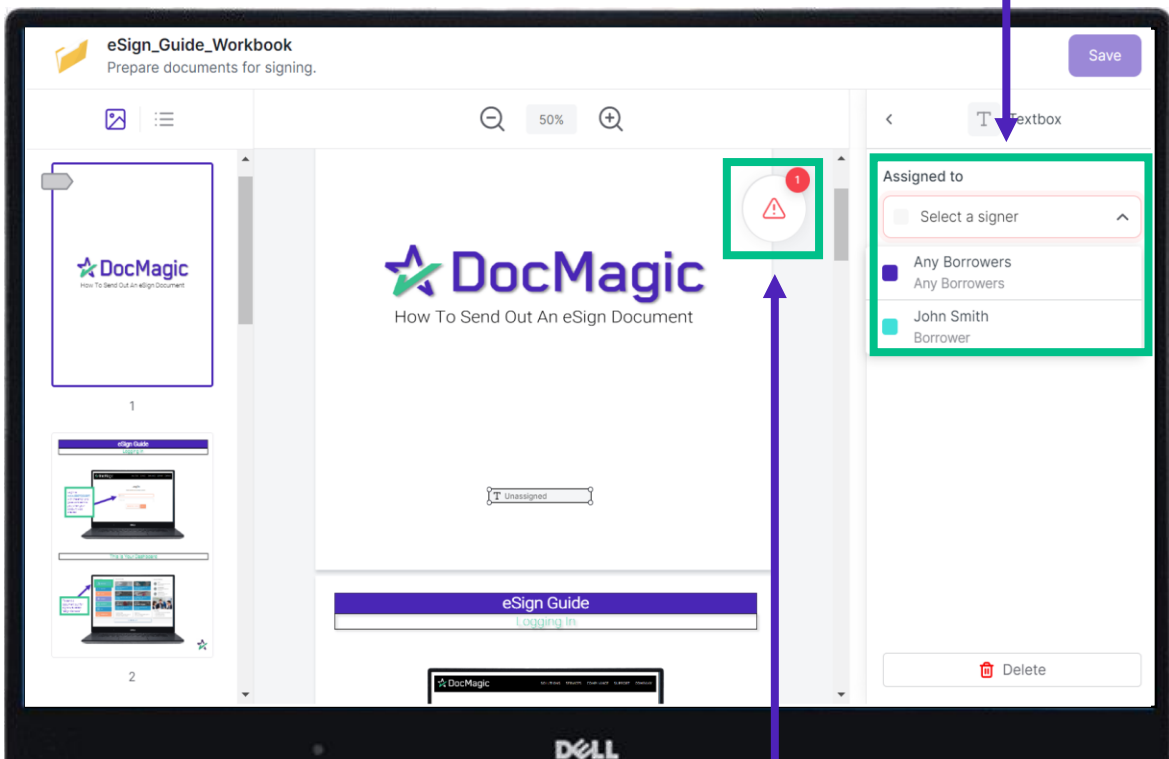
You can also delete the field from the bottom right or by hitting backspace/delete on your keyboard.



Creating a Custom eSign Request

Prepare Your Document

If you select a field from the Signatures & Initials or PostFill categories, you are required to assign it to a signer. The box will flash red until you do.



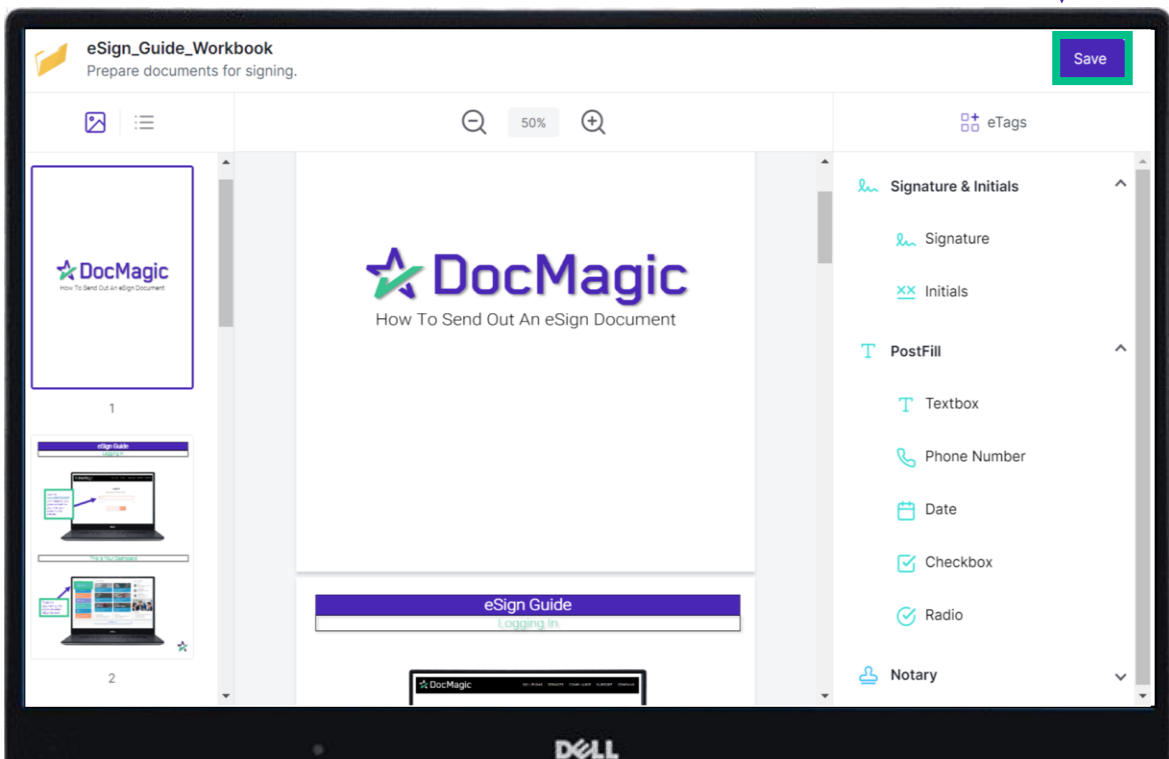
The warning that appears will go away after you select a signer.



Creating a Custom eSign Request

Save

When you're done, hit Save. If the button is greyed out, you probably have an error somewhere.



Creating a Custom eSign Request

Optional Subject & Message

Close the window. You will be returned to the eSign Console shown below.

eSign Console - Steve Truitt

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

***From:** (You) struitt@docmagic.com

Steve Middle Truitt Suffix

(Signers) aland@docmagic.com

John Middle Smith Suffix Code

***Documents:** eSign_Guide_Workbook.pdf Attach Prepare your document

Subject: optional Optional

Message: optional Optional

I have read and agree to the [Terms of Use](#).

Clear Save Cancel

DELL

You have the option of adding a Subject or Message.



Creating a Custom eSign Request

Send It

Check the box agreeing to the Terms of Use and the Send button will illuminate.

eSign Console - Steve Truitt

Scheduler Monitoring Accounts eSign Requests Create Request Search Account

***From:**
(You) struitt@docmagic.com
Steve Middle Truitt Suffix

(Signers)
aland@docmagic.com
John Middle Smith Suffix Code

***Documents:**
eSign_Guide_Workbook.pdf Attach Prepare your document

Subject:
optional Optional

Message:
optional Optional

I have read and agree to the Terms of Use.

Clear Save Send

DELL

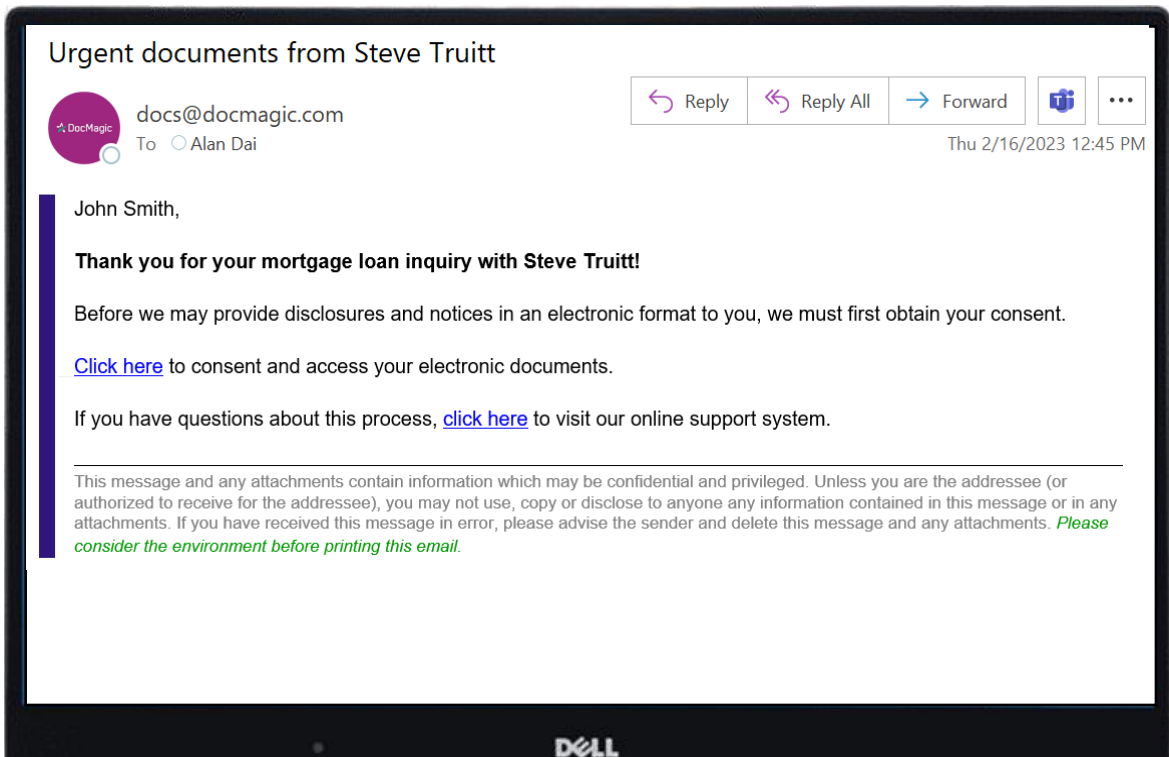
If everything looks good, hit Send.



Creating a Custom eSign Request

Emails

After you hit send, participants will receive this email asking them to sign.



You will receive the following e-mails:

- Confirmation with all the details of the document sent out for signature
- Notification when a signer finishes
- Final email when a document is fully signed

