



Lender Experience

Lender Experience

Introduction



This guide goes over the lender's experience when processing loan documents with DocMagic.



Lender Experience

DocMagic Online

For this example, we're going to demonstrate processing a set of documents through DocMagic Online.

The screenshot displays the DocMagic Online dashboard for a user named Alan. The interface is organized into several key sections:

- Header:** Includes contact information (INFO@DOCMAGIC.COM, PHONE (800) 649-1362), social media icons, and a "DASHBOARD / LOG OUT" button.
- Navigation:** A menu with links for SOLUTIONS, SERVICES, COMPLIANCE, SUPPORT, and COMPANY.
- User Greeting:** "WELCOME ALAN! (#100AD)" with a "TOUR THE DASHBOARD" link.
- Launch Center:** A vertical list of tool icons including eSign Console, AutoPrep™, DocMagic®, DocMagicXL®, SmartCLOSE®, LoanMagic® Console, eVault, and SmartREGISTRY™.
- My Documents:** A grid of document management tools:
 - DOCUMENT FILES:** Access and manage your loan document files.
 - FORMS MANAGER:** Add and remove forms from your document packages.
 - STACKING ORDER:** Modify the order of documents in your packages.
 - REPORT MANAGER:** Generate reports: 1098, Closing, HMDA, LEF and more.
 - LOAN DEFAULTS:** Manage charges, fees, premiums, impounds, and more.
 - SAMPLE DOCUMENT REVIEW:** Review and approve your sample documents.
- Account Settings:** A sidebar menu with sections for:
 - USERS:** Set up and manage user accounts and permissions.
 - PLAN MANAGER:** Manage the loan programs for your account.
 - LENDER PROFILE:** Manage your company and contact information.
- Latest News:** A list of updates including "URLA: Updates, Improvements and Deadlines", "Getting Started with eClose", and "Closing a Loan Electronically".

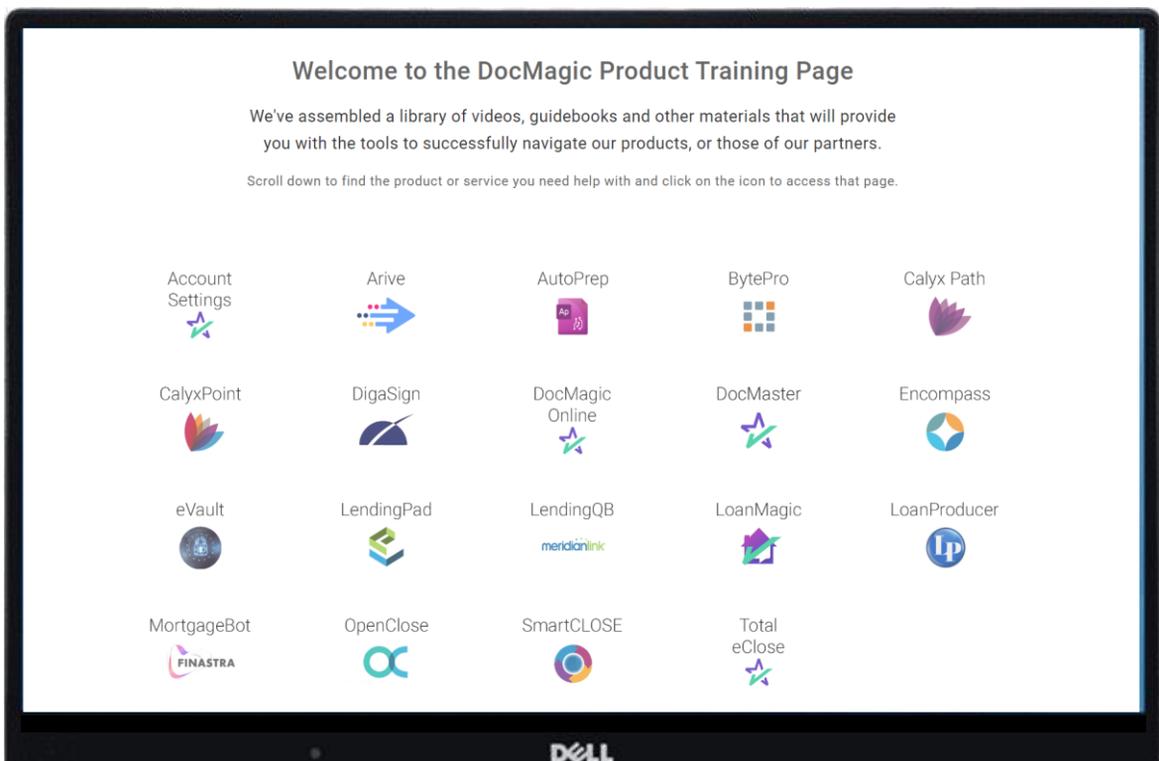
The Dell logo is visible at the bottom center of the screen.



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Other LOS's

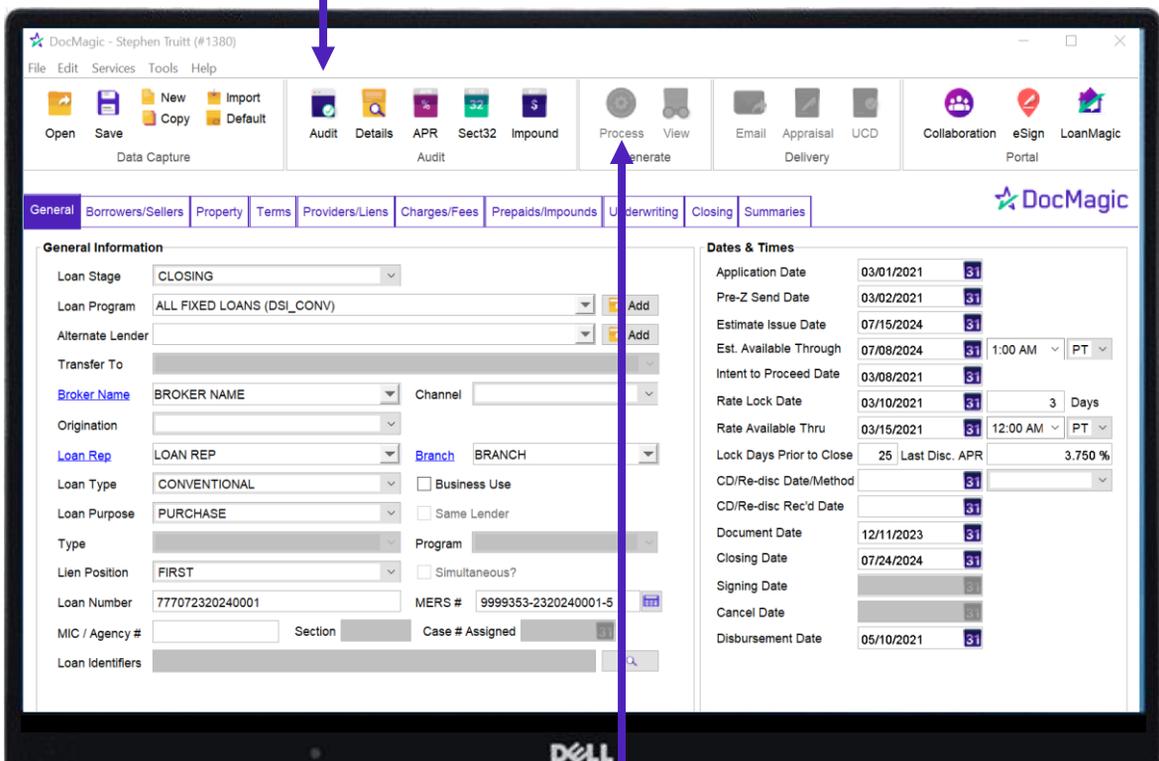
You can find training for other LOS's
on our [Product Training Page](#).



Lender Experience

Audit

Once the information is collected and entered, we always recommend that you run an audit.



Sometimes, the Process button will be greyed out until you run an Audit.



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Loan Detail Report

DocMagic's Audit function contains a robust [Loan Detail Report](#), which is the hallmark of our compliance initiative. Click Details to view. This will open in your web browser.

The screenshot displays the DocMagic software interface. A window titled "Data Validation - Worksheet #131" is open, showing a table of audit results. A warning icon and the text "35 Warning issues have been detected." are visible at the top of the table. The table has columns for Type, Message, Category, and Details. The "Details" column contains document icons. A blue arrow points from the text box above to the "Details" button in the software's toolbar.

Type	Message	Category	Details
WARNING	Document Date is more than '5' days in the past	DataValidation	
WARNING	Disbursement Date must be after Document Date	DataValidation	
WARNING	Disbursement Date must be after Closing Date	DataValidation	
WARNING	Is mortgage insurance required?	DataValidation	
WARNING	This is an MD Higher-Priced Mortgage Home Loan (COMAR 09.03.06.02 and COMAR 09.03.09.02)	HighCost-HPML	
WARNING	This is a federal Higher-Priced Mortgage Loan; APR exceeds comparable Average Prime Offer Rate by 1.5% or more	HighCost-Section35	
WARNING	No LE Initial Deposit Amount detected.	Federal-RESPA	
WARNING	This is a Federal Higher-Priced Mortgage Loan secured by a first lien on a principal dwelling; the creditor must establish an escrow account for the payment of property taxes and creditor-required mortgage-related insurance premiums (REG. Z Section 1026.35(b)(1)).	HighCost-Section35	
WARNING	Reg. Z prohibits payments to loan originators based on loan terms, including the interest rate. Make sure	Federal-TILA	



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Loan Detail Report Tabs

Within these three tabs, you can verify the transaction details, validate the data, and get a comprehensive compliance audit.

The screenshot shows a 'Loan Detail Report' interface. At the top right is the DocMagic logo. Below the header is a metadata section with the following information:

Loan Number:	777072320240001	File ID:	1380
Borrower Name:	STEPHEN TRUITT	Client Number:	100SALES
Property Address:	123 MAIN STREET, INDIANAPOLIS MD 10012	Date of Report:	07/23/2024

Below the metadata is a navigation bar with three tabs: 'Transaction Details' (highlighted with a green border), 'Data Validation', and 'Compliance Audit'. A purple arrow points from the callout box to the 'Transaction Details' tab. To the right of the tabs is a 'Collapse all' link with a downward arrow.

The main content area is titled 'DETAILS' and is expanded to show the following sections:

- LENDER INFO**
 - Lender Name:** DSI TEST LENDER (SALES)
 - Loan Program:** ALL FIXED LOANS (DSI_CONV)
 - Transfer To:**
- LOAN IDENTIFIERS**
 - Loan Number:** 777072320240001
 - Loan Purpose:** Purchase
 - FHA Section:**
 - Loan Rep:** LOAN REP
 - FHA/VA Case:**
 - Loan Type:** Conventional
 - MIC #:**
 - Broker Name:** BROKER NAME
 - MERS #:** 9999353-2320240001-5
 - Origination Type:**
 - Branch:** BRANCH
- IMPORTANT DATES**
 - Application Date:** 03/01/2021
 - Cancel Date:**
 - CD/Re-Disc Send Date:**

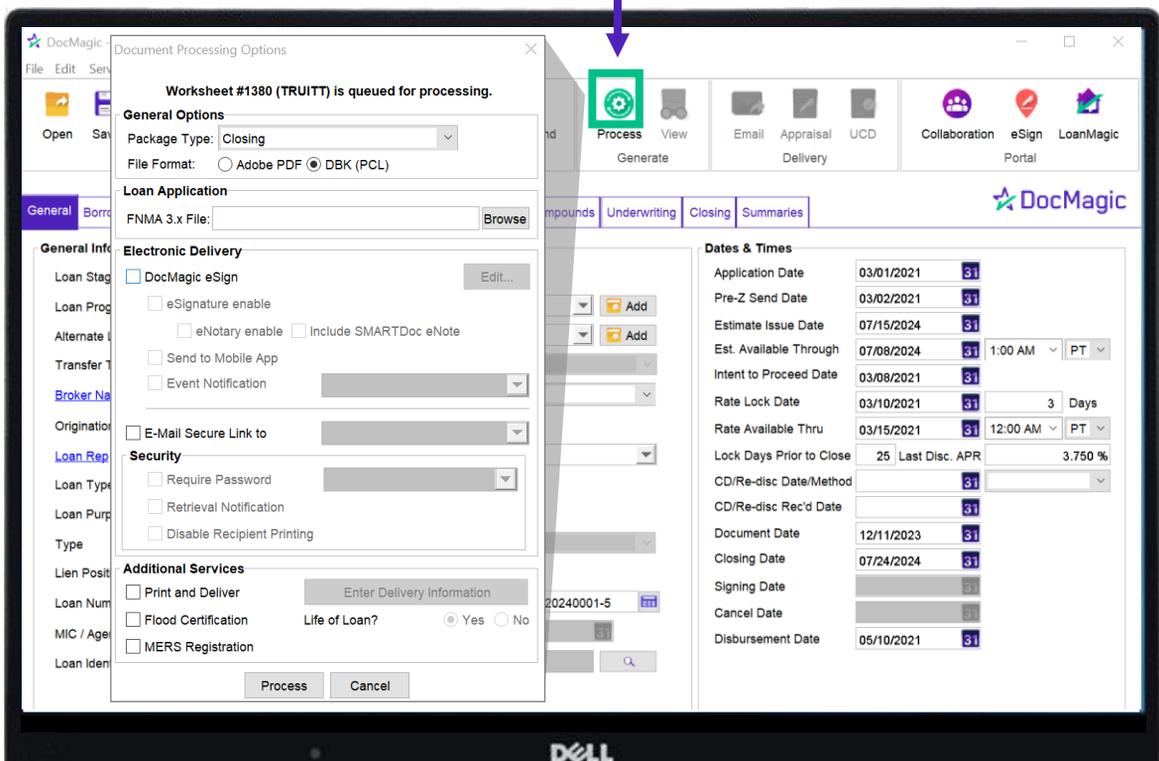
The Dell logo is visible at the bottom center of the monitor frame.



Lender Experience

Process

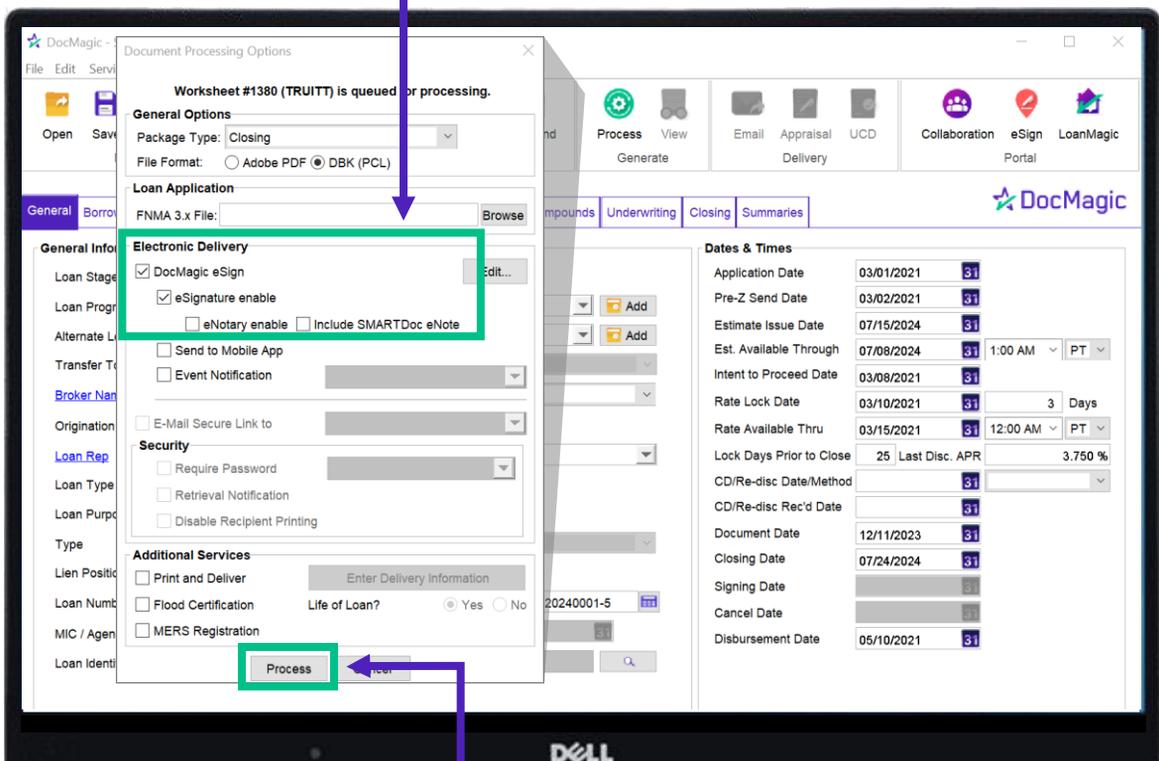
Once the information has been vetted, and you're ready to move forward, you can process the documents by clicking here.



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Process

With DocMagic Online, you can choose Hybrid 1, 2, 3 or Total eClose™. In this case, we're going to process a Hybrid 1, which is eSign with paper note and paper notary.



Click Process.



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Confirmation

You'll receive a confirmation message.

The screenshot displays the DocMagic software interface for loan processing. A central dialog box titled "Process Complete" is overlaid on the main application window. The dialog box contains the following text:

Congratulations!

Your documents have been processed successfully.

WebSheet: 1380

Borrower: STEPHEN TRUITT

WebDocs Code: 100SALES-12GJ-H8c-1NWQd70FIL0K

[Click here to download your documents](#)

[Click here to download the FREE DocMaster viewer](#)
(the software REQUIRED to view and print documents).

Don't show this window again.

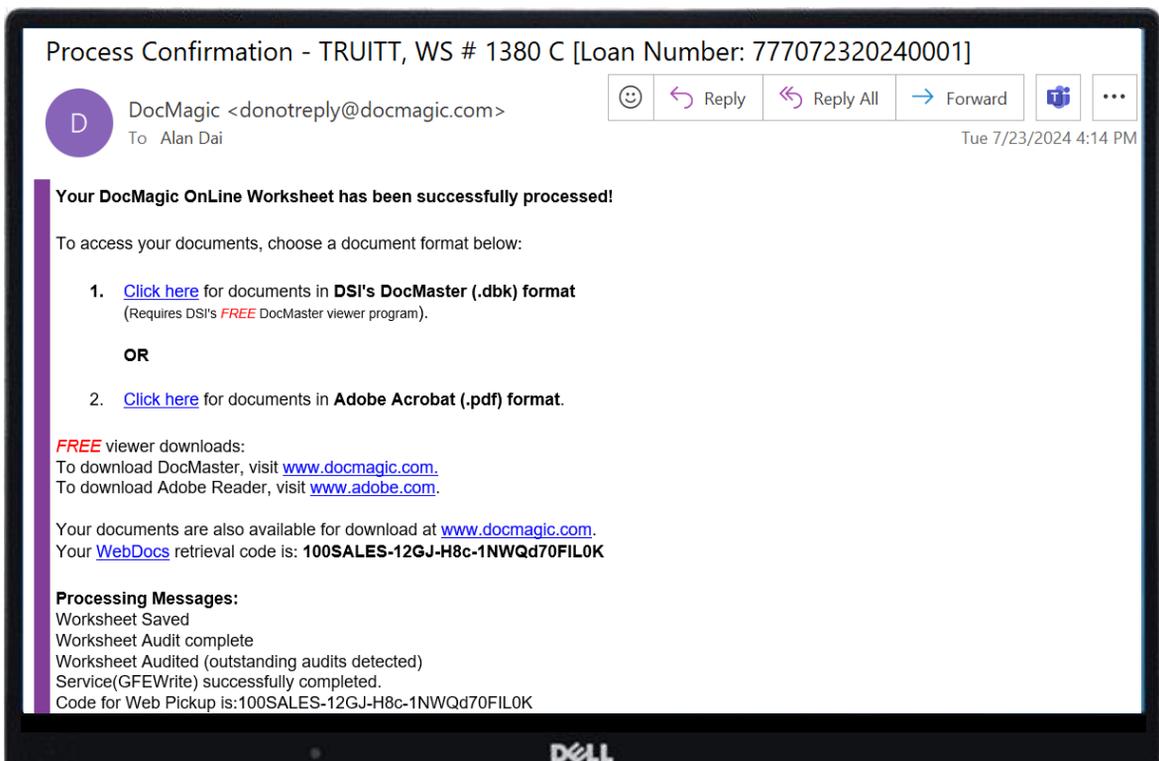
The background application window shows the "General" tab of the loan information form. The "Loan Stage" is set to "CLOSING". The "Loan Program" is "ALL FIXED LOANS (DSI...". The "Loan Type" is "CONVENTIONAL". The "Loan Purpose" is "PURCHASE". The "Loan Number" is "777072320240001". The "MERS #" is "9999353-2320240001-5". The "Disbursement Date" is "05/10/2021".



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Confirmation

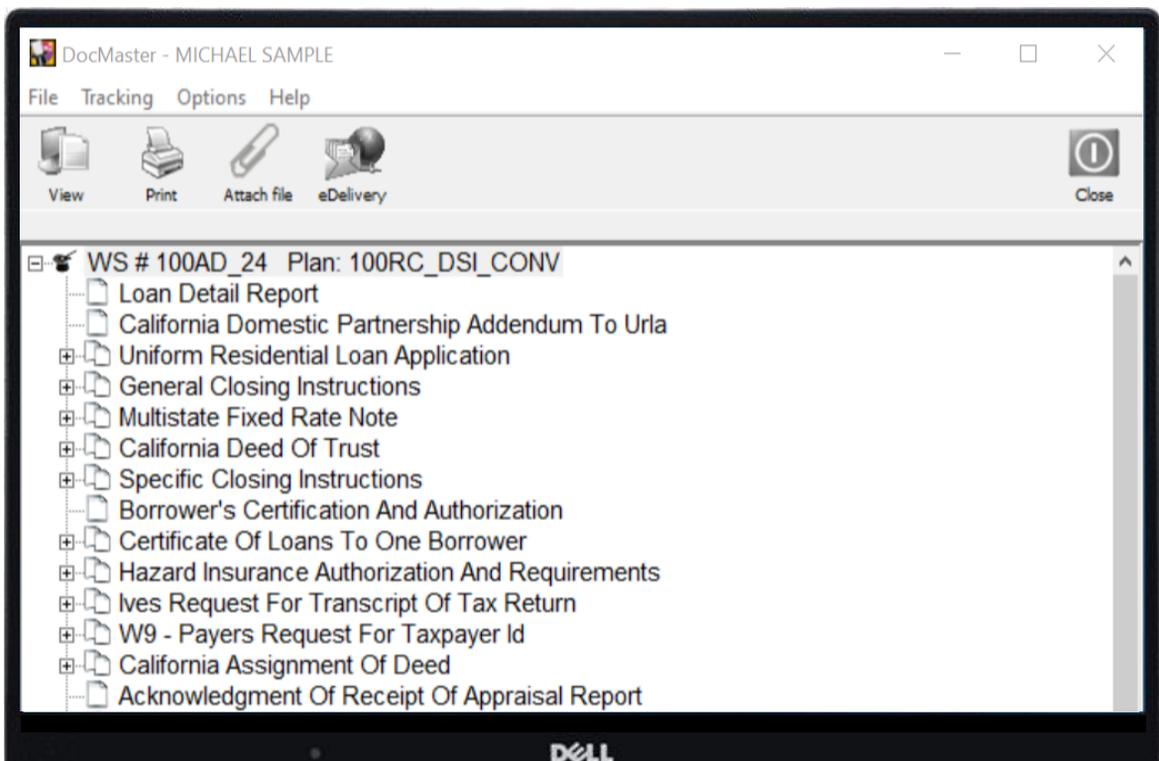
You'll also get a confirmation email that looks like this.



Lender Experience

DocMaster

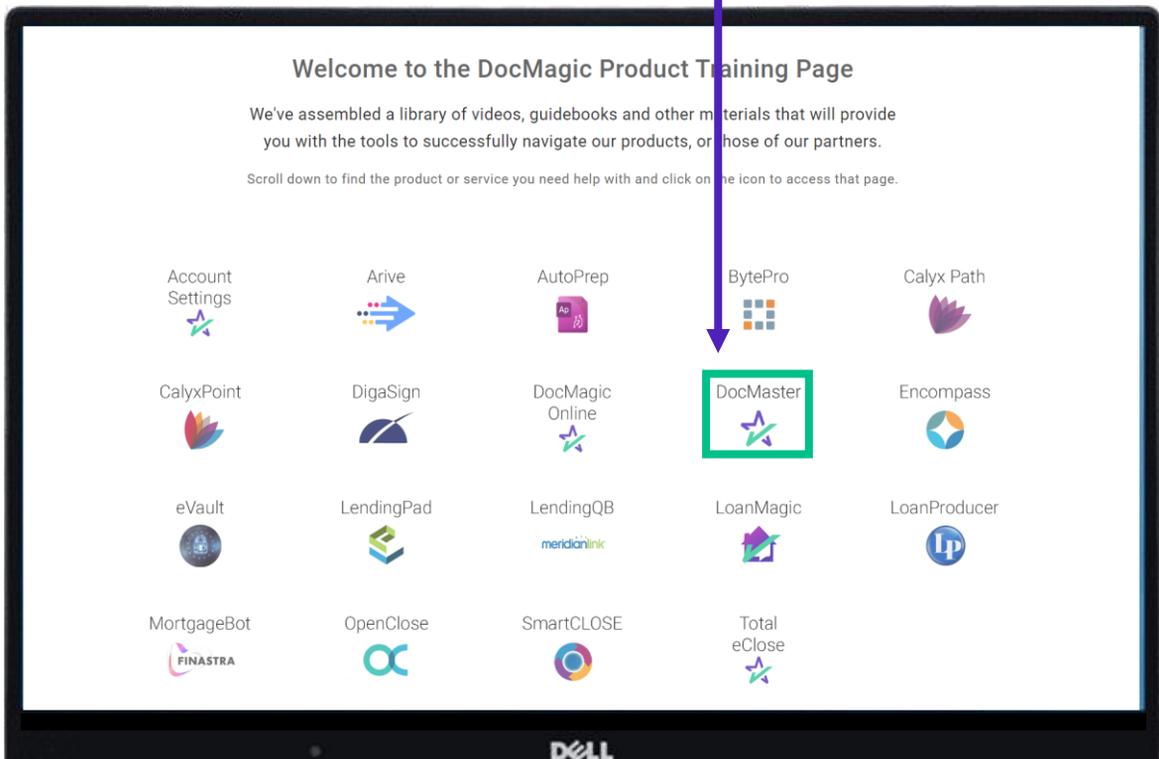
From the confirmation message and/or email, you can activate DocMaster, our proprietary document window that allows you to preview, prep, and edit the Documents before signing.



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DocMaster

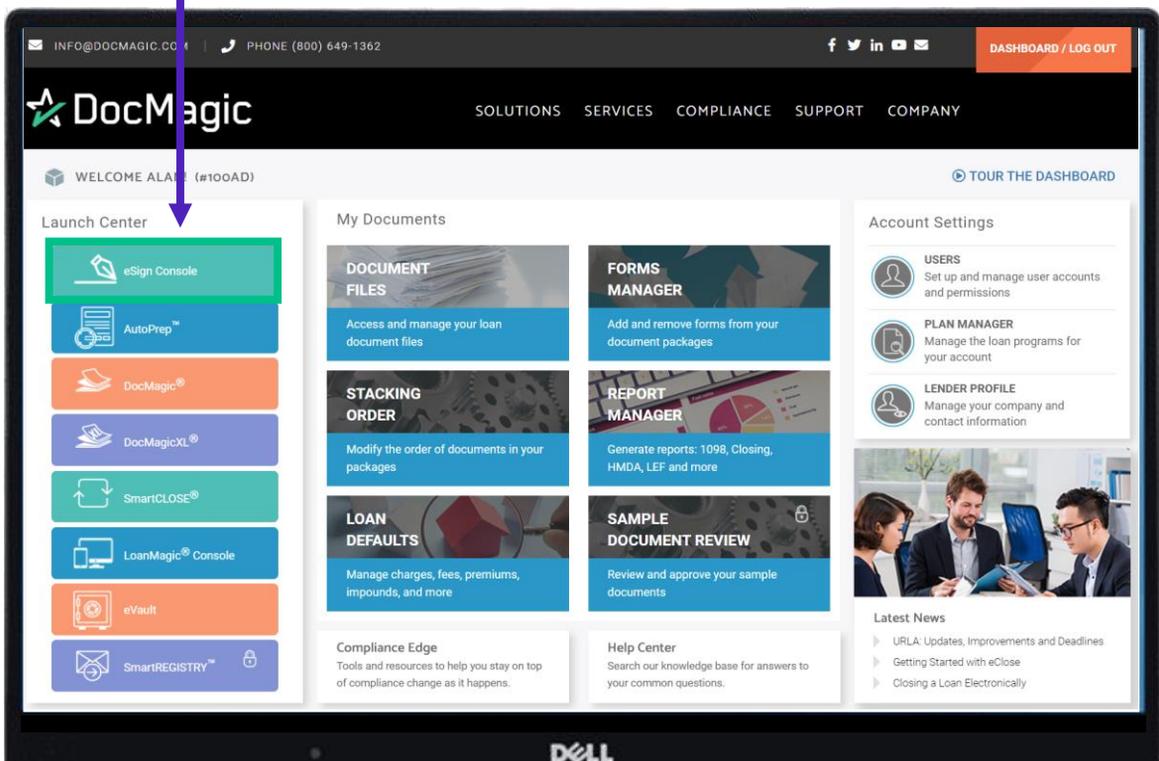
A training for DocMaster can be found on our Product Training Page.



Lender Experience

eSign Console

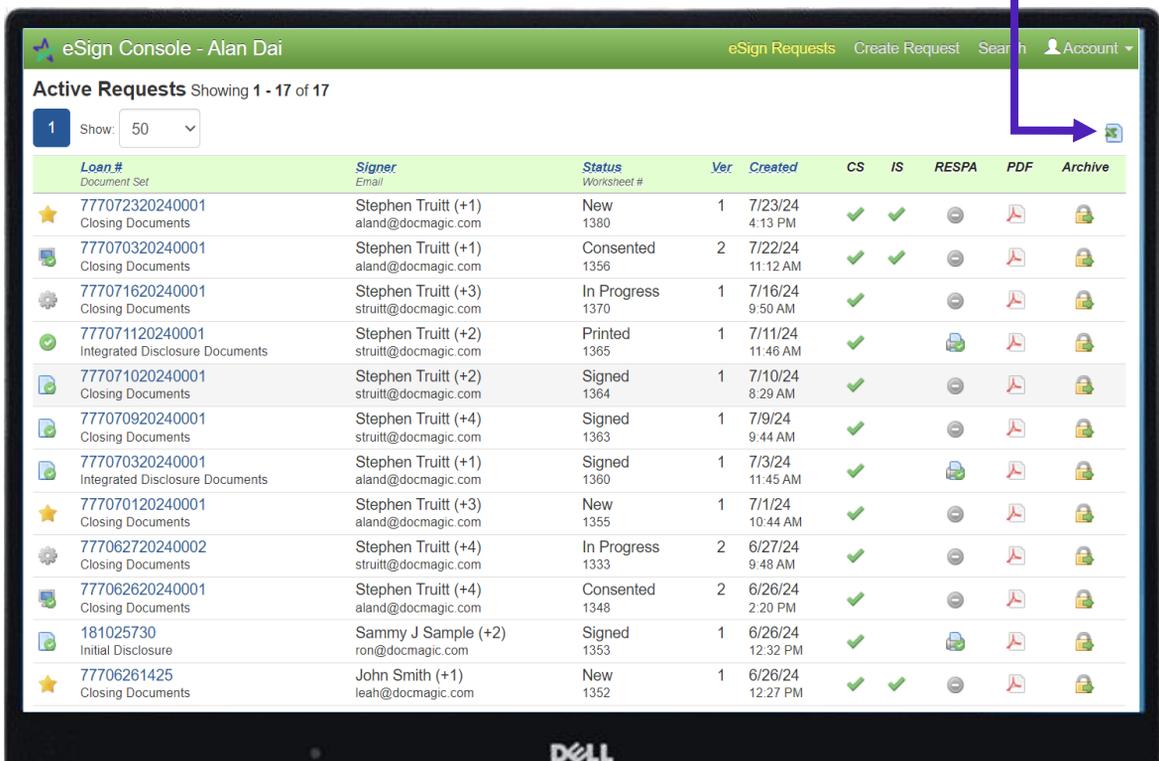
After sending out the documents, you can access your [eSign Console](#) here from your dashboard.



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eSign Console

You'll be greeted with a list of document sets that have been processed within the past 90 days. You can also export this information as a csv.



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	✓	✓	⊖	📄	🔒

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.



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Help Button

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

The screenshot displays the eSign Console interface for user Alan Dai. The top navigation bar includes 'eSign Requests', 'Create Request', 'Search', and 'Account'. The 'Account' dropdown menu is open, showing options: 'My Account', 'Preferences', 'Contact Us', 'Help', and 'Sign Out'. The 'Help' option is highlighted with a green box. Below the navigation bar, the 'Active Requests' section shows a table of 17 requests. The table columns are: Loan #, Signer, Status, Ver, Created, CS, IS, and RES. The table contains various rows with details for different loan documents and their current status.

Loan #	Signer	Status	Ver	Created	CS	IS	RES
777072320240001	Stephen Truitt (+1)	New	1	7/23/24	✓	✓	
777070320240001	Stephen Truitt (+1)	Consented	2	7/22/24	✓	✓	
777071620240001	Stephen Truitt (+3)	In Progress	1	7/16/24	✓		
777071120240001	Stephen Truitt (+2)	Printed	1	7/11/24	✓		
777071020240001	Stephen Truitt (+2)	Signed	1	7/10/24	✓		
777070920240001	Stephen Truitt (+4)	Signed	1	7/9/24	✓		
777070320240001	Stephen Truitt (+1)	Signed	1	7/3/24	✓		
777070120240001	Stephen Truitt (+3)	New	1	7/1/24	✓		
777062720240002	Stephen Truitt (+4)	In Progress	2	6/27/24	✓		
777062620240001	Stephen Truitt (+4)	Consented	2	6/26/24	✓		
181025730	Sammy J Sample (+2)	Signed	1	6/26/24	✓		
77706261425	John Smith (+1)	New	1	6/26/24	✓	✓	
3306261113	Ron Sample (+1)	In Progress	1	6/25/24			



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Status Icons

The icons on the left indicate the processing status of the document set. A star icon means that the set has just been processed (it's new).

eSign Console - Alan Dai eSign Requests Create Request Search Account

Active Requests Showing 1 - 17 of 17

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	✓	✓	⊖	📄	🔒

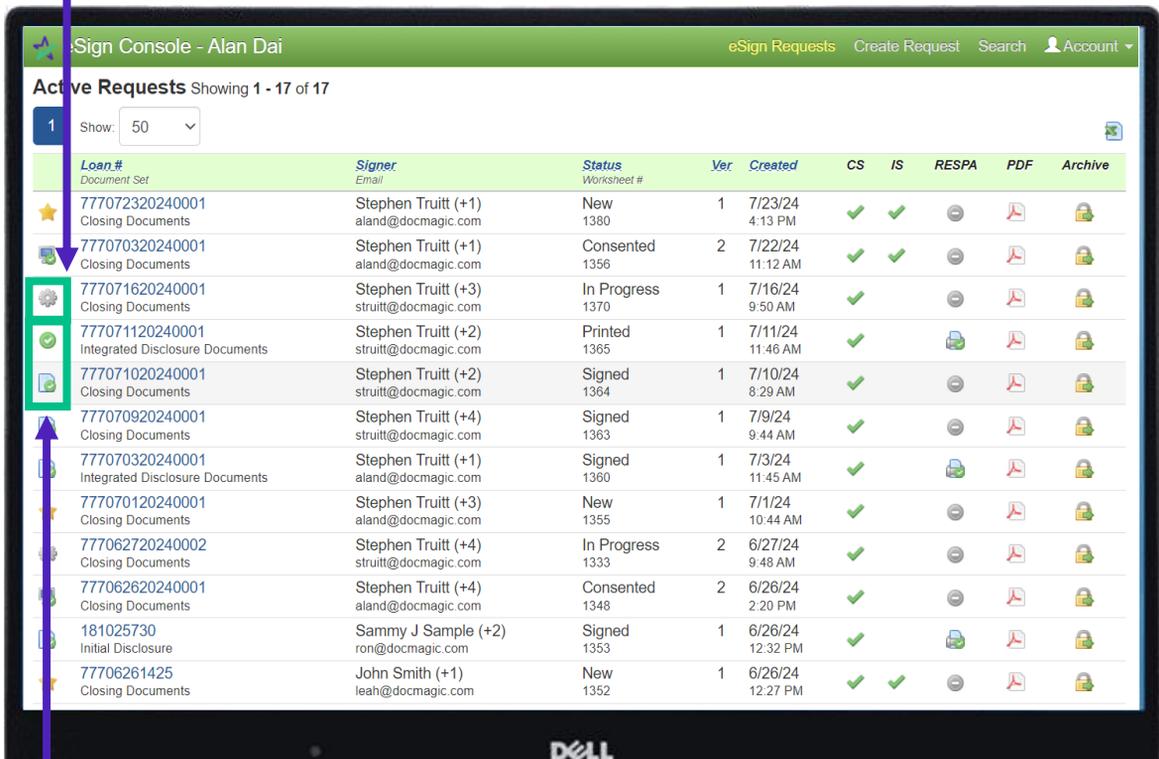
The computer monitor with the check mark indicates that the participant(s) have consented to the use of electronic signatures and eSign.



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Status Icons

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



The screenshot shows the 'eSign Console - Alan Dai' interface. At the top, there are navigation links for 'eSign Requests', 'Create Request', 'Search', and 'Account'. Below this, the 'Active Requests' section shows 'Showing 1 - 17 of 17'. A dropdown menu is set to 'Show: 50'. The main table lists requests with columns for Loan #, Document Set, Signer, Status, Ver, Created, CS, IS, RESPA, PDF, and Archive. A blue arrow points from the text box above to a gear icon in the 'Status' column of the row with Loan # 777071620240001. Another blue arrow points from the text box below to a checkmark icon in the 'Status' column of the row with Loan # 777071120240001.

Loan #	Document Set	Signer	Status	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 piece of paper with the check mark indicates that the set has been completed and signed. Meanwhile, the *full checkmark* indicates that the document set has been completed, signed, and *printed*.



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Opening a Document Set

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

The screenshot shows the eSign Console interface for Steve Truitt. The interface includes a navigation bar with options like Scheduler, Monitoring, Accounts, eSign Requests, Create Request, Search, and Account. Below the navigation bar is a table of document sets. The first row of the table has the loan number 777100320220001 highlighted with a green box, and a callout box points to it with the text 'Click on the loan number to see details about that document set.'

Loan.# Document Set	Signer Email	Status Worksheet #	Ver	Created	CS	IS	RESPA	PDF	Archive
777100320220001 Closing Documents	John Smith (+3) aland@docmagic.com	New 2991	1	10/3/22 2:04 PM	✓	⊖	⊖	📄	🔒
77710031350 Closing Documents	John Smith (+2) ron@docmagic.com	New 2990	1	10/3/22 1:54 PM	✓	⊖	⊖	📄	🔒
77710031349 Closing Documents	John Smith (+2) ron@docmagic.com	New 2989	1	10/3/22 1:52 PM	✓	⊖	⊖	📄	🔒
77710031348 Closing Documents	John Smith (+2) ron@docmagic.com	New 2988	1	10/3/22 1:49 PM	✓	⊖	⊖	📄	🔒
77709291543 Closing Documents	John Smith (+3) lfortunato@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	✓	⊖	⊖	📄	🔒



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Key Info

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

The screenshot displays the 'eSign Console - Steve Truitt' interface. At the top, there is a navigation bar with options: Scheduler, Monitoring, Accounts, eSign Requests, Create Request, Search, and Account. Below this, a summary box provides key information:

- 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

Below the summary box are tabs for Details, Documents, Documents Received, EMail, and Versions. The 'Participants' section shows a table with the following data:

#	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

The 'Action Log' section shows the following entries:

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

At the bottom of the console, there are buttons for 'Add Internal Note', 'Cancel Request', and 'Delete Request'. The footer includes the copyright notice '© Copyright 2022 DocMagic, Inc. - ALL RIGHTS RESERVED' and links for 'Home', 'Contact', 'Privacy Policy', and 'Terms of Use'. A Dell logo is visible at the bottom center of the screen.



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Worksheet Number

If you have an issue where you need to contact DocMagic's Customer Service department, they'll always ask you for the worksheet number.

The screenshot displays the 'eSign Console - Steve Truitt' interface. At the top, there is a navigation bar with options: Scheduler, Monitoring, Accounts, eSign Requests, Create Request, Search, and Account. Below this, the loan details are shown in a grid format:

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

A blue arrow points from the text box above to the 'Worksheet #: 2990 (Version: 1)' field. Below the details, there are tabs for 'Details', 'Documents', 'Documents Received', 'Emails', and 'Versions'. The 'Participants' section shows a table with columns: #, Name/Email, Role, Created, Started, Consented, Viewed, Completed, Declined, and Links. Two participants are listed: John Smith (Borrower) and Andy Agent (Settlement Agent). The 'Action Log' section shows a table with columns: Date, User, IP Address, and Description. Three actions are listed, all occurring on 10/3/22 at 1:54 PM, involving System User, John Smith, and Andy Agent. At the bottom, there are buttons for 'Add Internal Note', 'Cancel Request', and 'Delete Request'. The footer includes copyright information and links for Home, Contact, Privacy Policy, and Terms of Use.



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Details

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

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

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



Lender Experience

Links

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

The screenshot displays the eSign Console interface for a loan. The top navigation bar includes 'Scheduler', 'Monitoring', 'Accounts', 'eSign Requests', 'Create Request', 'Search', and 'Account'. The main content area is divided into several sections:

- Loan Details:** Loan #: 77710031350, Lender: Ron Carrillo, Status: New (Active), Documents: 15 (55 total pages), Signers: 3, Expires: N/A (Requires: Primary), Signatures: Y.
- Participants Table:**

#	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

- Action Log Table:**

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

Additional elements include 'Details', 'Documents', 'Documents Received', 'EMails', and 'Versions' tabs; a 'Return to Search' link; a 'Preview Mode - Off' indicator; and buttons for 'Cancel Request' and 'Delete Request'.

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



Lender Experience

Links

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

The screenshot displays the eSign Console interface for a loan. The top navigation bar includes 'Scheduler', 'Monitoring', 'Accounts', 'eSign Requests', 'Create Request', 'Search', and 'Account'. The main content area shows loan details for Loan # 77710031350, Lender: Ron Carrillo, and Status: New (Active). Below this, there are tabs for 'Details', 'Documents', 'Documents Received', 'Emails', and 'Versions'. The 'Participants' section contains a table with columns for #, Name/Email, Role, Created, Started, Consented, Viewed, Completed, Declined, and Links. The table lists two participants: John Smith (Borrower) and Andy Agent (Settlement Agent). The 'Links' column for Andy Agent has a red box around the 'Agent Portal' link. Below the participants table is an 'Action Log' section with columns for Date, User, IP Address, and Description. The bottom of the screen shows copyright information and navigation links.

#	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

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



Lender Experience

Adding Participants

Click here to add participants.

The screenshot displays the eSign Console interface for user Steve Truitt. The main window shows loan details for Loan # 7710031350, Lender Ron Carrillo, and Status New (Active). A modal window titled "Add Participant" is open, prompting for information for a new participant. The fields are: First Name (Notary_name_placeholder), Last Name, Email, Access Code, and Role (Settlement Agent). The "Add" button is highlighted with a green box. The background interface includes a "Participants" table with two entries, an "Action Log" table, and various navigation and utility buttons.

#	Name/Email
1	John Smith ron@docmagic.com
3	Andy Agent ron@docmagic.com

Date		
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

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.



Lender Experience

Adding Participants

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

The screenshot displays the eSign Console interface for a loan. The top navigation bar includes 'Scheduler', 'Monitoring', 'Accounts', 'eSign Requests', 'Create Request', 'Search', and 'Account'. The main content area shows loan details for Loan # 77710031350, Lender Ron Carrillo, and Primary Name John Smith. Below this, there are tabs for 'Details', 'Documents', 'Documents Received', 'Emails', and 'Versions'. The 'Participants' section is active, showing a table with columns for #, Name/Email, Role, Created, Started, Consented, Viewed, Completed, Declined, and Links. The table lists three participants: John Smith (Borrower), Andy Agent (Settlement Agent), and a Notary placeholder. The 'Sign Documents' link for the Notary participant is highlighted with a red box. Below the participants table is an 'Action Log' section with columns for Date, User, IP Address, and Description. The footer contains copyright information and navigation links.

#	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 Sign Documents

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



Lender Experience

Disable Preview Mode Toggle

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

The screenshot shows the eSign Console interface for a loan. The top navigation bar includes 'Scheduler', 'Monitoring', 'Accounts', 'eSign Requests', 'Create Request', 'Search', and 'Account'. The loan details section shows:

- Loan #: 071320220002
- Primary Name: John Smith
- Type: EClosing
- Package Id: 562064
- Worksheet #: 2732 (Version : 1)
- Closing Date: 7/14/22
- Lender: Steve Truitt
- DSI TEST LENDER (SALES) (100SALES)
- struitt@docmagic.com
- (800)649-1362
- Status: New (Active)
- Documents: 15 (57 total pages)
- Signers: 2
- Expires: N/A (Requires: Primary)
- Signatures: Y (Ink Sign)

Below the details are tabs for 'Details', 'Documents', 'Documents Received', 'EMails', and 'Versions'. A 'Preview Mode - On' toggle is visible in the top right corner of the main content area. The 'Participants' table is as follows:

#	Name/Email	Role	Created	Started	Consented	Viewed	Completed	Declined	Links
1	John Smith struitt@docmagic.com	Borrower	7/13/22 10:47 AM						<input checked="" type="checkbox"/> Send Email <input checked="" type="checkbox"/> Preview Documents
3	Andy Agent struitt@docmagic.com	Settlement Agent	7/13/22 10:48 AM						<input checked="" type="checkbox"/> Send Email <input checked="" type="checkbox"/> Agent Portal

The 'Action Log' table is as follows:

Date	User	IP Address	Description
7/13/22 10:48 AM	System User		eSign event created
7/13/22 10:48 AM	John Smith		Invitation sent to struitt@docmagic.com
7/13/22 10:48 AM	Andy Agent		Invitation sent to struitt@docmagic.com

At the bottom, there are buttons for 'Add Internal Note', 'Cancel Request', and 'Delete Request'. The footer includes '© Copyright 2022 DocMagic, Inc. - ALL RIGHTS RESERVED' and 'Home Contact Privacy Policy Terms of Use'.

Turning Preview Mode Off allows the Settlement Agent to sign their documents before closing. *However, if they don't turn it back on, the borrower can also sign before closing.* The next few slides will go disabling this permission.



Lender Experience

Disable Preview Mode Toggle

Start by going to Accounts. You can always find it at the top.

eSign Console - Stephen Truitt

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

Account Name:

Account Number:

Search

1 2 3 4 5 6 7 8 9 10 6068 Next

Account Number	Account Name	Group Id	Theme	Active	Use New Console	Use New Sign
100	System	0	DocMagic	✓	✓	
eSign	eSign	1000	DocMagic	✓	✓	
100DSI	DocMagic	2000	Cincinnati Federal	✓	✓	
100DSI-DMO	DocMagic	2010	DocMagic	✓	✓	
100CG	Chris Mortgage	10001	Box Home Loans 1004	✓	✓	
100JF	DSI_TEST_LENDER	10002	DocMagic	✓	✓	
100RC	DSI TEST LENDER (RON CARRILLO)	10003	Ron's clean sample	✓	✓	
100RL	RICKS TEST LENDER	10004	Fremont Bank	✓		
100MSM	DOCMAGIC TEST LENDER	10005	DocMagic (Michael Morford)	✓	✓	
100CM	SAMPLE LENDER	10006	Colin - Allied	✓	✓	
100SR	DSI TEST LENDER STEVE RIBULTAN	10007	DocMagic	✓	✓	
100MLA	MICHELLE DSI TEST	10008	American Financing Corporation	✓	✓	
100MZ	SAMPLE LENDER'S	10009	Test theme	✓	✓	
100ALS	ALANS DSI TEST LENDER	10010	DocMagic	✓	✓	
100NK	DOCUMENT SYSTEMS, INC. TEST	10011	Norm	✓		
100JB	JEREMY'S TEST LENDER	10012	DocMagic	✓	✓	

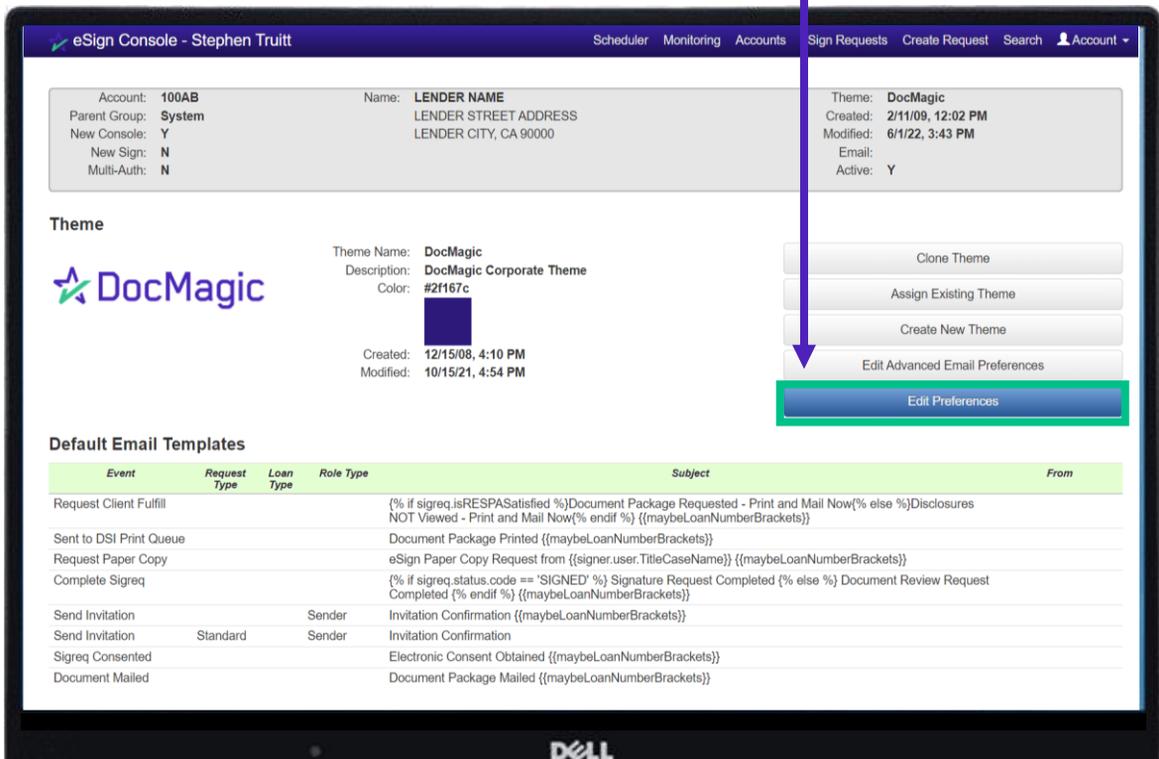
Click on an Account. The search function above allows you to filter by Account Name or Number.



Lender Experience

Disable Preview Mode Toggle

Select Edit Preferences.



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

Account: **100AB** Name: **LENDER NAME** Theme: **DocMagic**
Parent Group: **System** LENDER STREET ADDRESS Created: **2/11/09, 12:02 PM**
New Console: **Y** LENDER CITY, CA 90000 Modified: **6/1/22, 3:43 PM**
New Sign: **N** Email:
Multi-Auth: **N** Active: **Y**

Theme

 Theme Name: **DocMagic**
Description: **DocMagic Corporate Theme**
Color: **#2f167c**
Created: **12/15/08, 4:10 PM**
Modified: **10/15/21, 4:54 PM**

Clone Theme
Assign Existing Theme
Create New Theme
Edit Advanced Email Preferences
Edit Preferences

Default Email Templates

Event	Request Type	Loan Type	Role Type	Subject	From
Request Client Fulfill				{% if sigreq.isRESPASatisfied %}Document Package Requested - Print and Mail Now{% else %}Disclosures NOT Viewed - Print and Mail Now{% endif %} {{maybeLoanNumberBrackets}}	
Sent to DSI Print Queue				Document Package Printed {{maybeLoanNumberBrackets}}	
Request Paper Copy				eSign Paper Copy Request from {{signer.user.TitleCaseName}} {{maybeLoanNumberBrackets}}	
Complete Sigreq				{% if sigreq.status.code == 'SIGNED' %} Signature Request Completed {% else %} Document Review Request Completed {% endif %} {{maybeLoanNumberBrackets}}	
Send Invitation			Sender	Invitation Confirmation {{maybeLoanNumberBrackets}}	
Send Invitation	Standard		Sender	Invitation Confirmation	
Sigreq Consented				Electronic Consent Obtained {{maybeLoanNumberBrackets}}	
Document Mailed				Document Package Mailed {{maybeLoanNumberBrackets}}	

DELL



Lender Experience

Disable Preview Mode Toggle

Set "Disable Preview Mode Toggle" to Yes.

The screenshot shows the 'eSign Console - Stephen Truitt' interface. The main heading is 'LENDER NAME (100AB)'. Below this, there are several sections of configuration options:

- 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** (highlighted with a green box and a purple arrow pointing to it from the instruction above)
- General**
 - Time Zone: America/Los_Angeles
- Participants**

The Dell logo is visible at the bottom of the monitor frame.

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



Lender Experience

Documents Tab

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

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

Loan #: 7771001350 Lender: Steve Truitt Status: New (Active)
Primary Name: John Smith Documents: 15 (55 total pages)
Type: EClosing Signers: 2
Package Id: 60482 Expires: N/A (Requires: Primary)
Worksheet #: 2990 (Version : 2) Signatures: Y (Ink Sign)
Closing Date: 9/30/22

Details Documents Documents Received Emails Versions

Documents

Document Name	ClickSign	Page(s)	Mark(s)	Signer(s)	Completed	Sigreq	Document Id	Document Id	Filename	Delete	Operation
1 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		n3031.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		urlali.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		leads.msc.xml		
13 New Jersey Initial Tax Authorization Notice	✓	1	0	0	✓		5175550 5187051		njitan.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

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



Lender Experience

Add a Document

The plus icon allows you to add documents to the package.

The screenshot displays the eSign Console interface for Steve Truitt. A modal window titled "Upload a new document" is open, featuring a "Document" input field and a "Browse" button. The background shows a list of documents with columns for Document Name, status, and operations.

Document Name	Status	Operations
1 Borrower's Certification, A		
2 Multistate Fixed Rate Note		
3 New Jersey Mortgage (MER)		
4 Uniform Residential Loan Appl		
5 Uniform Residential Loan Application - Lender Loan Information	✓	2 0 0 ✓
6 Addendum to Closing Instructions	✓	1 1 1
7 Specific Closing Instructions	✓	3 4 2
8 Hazard Insurance Authorization and Requirements	✓	2 1 1
9 IVES Request for Transcript of Tax Return	✓	2 2 1
10 Closing Disclosure	✓	5 1 1
11 Customer Identification Verification	✓	2 0 0 ✓
12 Initial Escrow Account Disclosure Statement	✓	2 1 1
13 New Jersey Initial Tax Authorization Notice	✓	1 0 0 ✓
14 New Jersey Private Well Testing Act Certification	✓	1 1 1
15 Signature Affidavit and AKA Statement		0/2 1 1

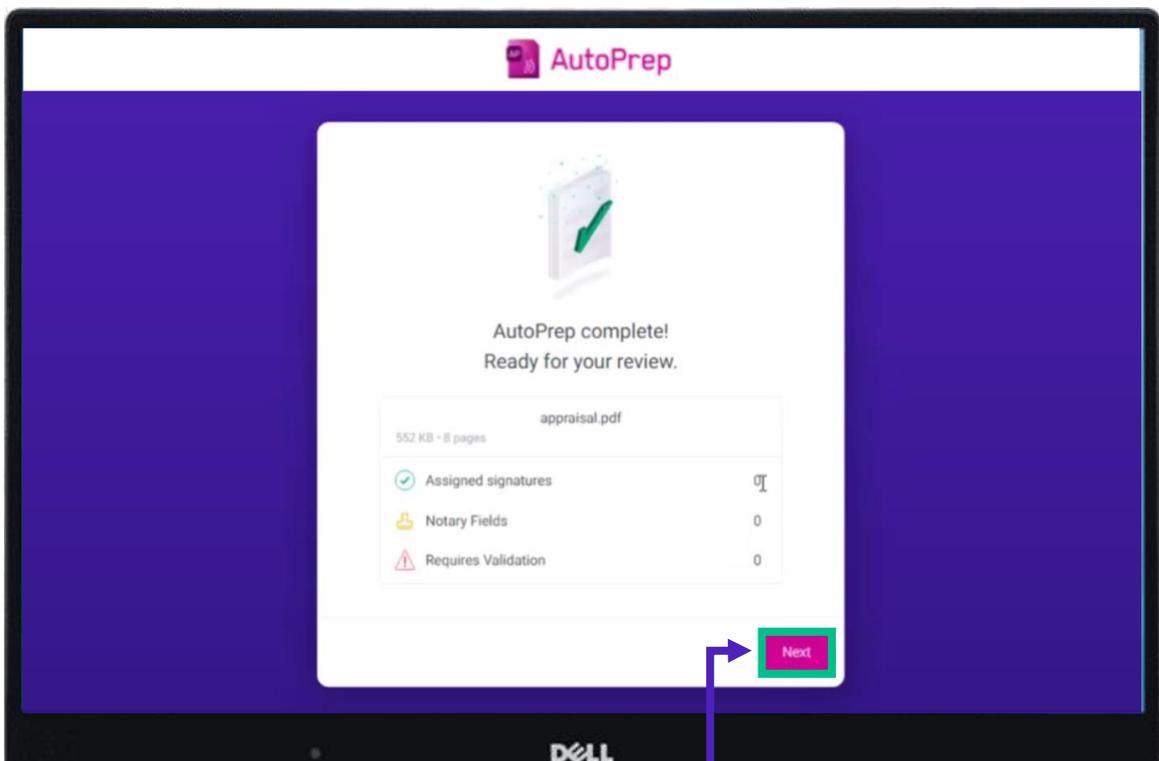
Click Browse. Select a document from your computer and then click the blue Submit button.



Lender Experience

AutoPrep

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



AutoPrep is our proprietary software that utilizes optical character recognition and artificial intelligence. For additional information, please visit our [Product Training Page](#). Click Next to continue.



Lender Experience

AutoPrep

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.

The screenshot displays a document editor interface for a PDF titled "1Johnsandysmith_title docs.pdf". The main content area shows a notary form with the following fields and text:

- Header: "1Johnsandysmith_title docs.pdf", "Prepare documents for signing."
- Search bar: "100%"
- Text: "[Space Below This Line For Acknowledgment]"
- 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."
- Form fields: "State of CALIFORNIA", "County of LOS ANGELES", "On [Notarization Date] before me, [Here Insert Name and Title of the Notarizing Officer]", "personally appeared John Smith AND Sandy Smith", "Name(s) of Signer(s)", "who proved to me on the basis of satisfactory evidence to be the person(s) whose name(s) is/are subscribed to 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 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."
- Buttons: "Notary Seal", "Commission Numb...", "Signature", "Signature of Notary Public".
- Right sidebar: "Assigned to", "Notary", "Required".
- Top right corner: "Done" button (highlighted with a green box).



Lender Experience

Refresh

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

The screenshot shows the eSign Console interface for a loan. The top navigation bar includes 'eSign Console - Steve Truitt', 'Scheduler', 'Monitoring', and 'Accounts'. The main header displays loan details: Loan # 777090720220001, Primary Name John Smith, Lender Steve Truitt, and Status In Progress. Below this is a tabbed interface with 'Documents' selected. A table lists 16 documents, with the 16th document, 'appraisal', highlighted in green. A blue arrow points from the text box above to the 'Documents' tab, and another blue arrow points from the text box below to the highlighted 'appraisal' document.

Document Name	ClickSign	Page(s)	Mark(s)	Signer(s)	Completed	Signeq Document Id Document
1 Borrower's Certification, Authorization and Consent	✓	2	1	1		5092137 5103638
2 Uniform Residential Loan Application	✓	7	1	1		5092138 5103639
3 Uniform Residential Loan Application - Lender Loan Information	✓	2	0	0	✓	5092139 5103640
4 Virginia Disclosure of Terms of Mortgage Application	✓	1	1	1		5092140 5103641
5 IVES Request for Transcript of Tax Return	✓	2	2	1		5092141 5103642
6 Authorization for the Social Security Administration to Release SSN Verification		0/1	1	1		5092142 5103643
7 Housing Counselors Near You	✓	6	0	0	✓	5092143 5103644
8 Important Information About Procedures For Opening A New Account	✓	1	1	1		5092144 5103645
9 Iowa Subordination Agreement	✓	4	0	0	✓	5092145 5103646
10 Lender Record Change	✓	2	0	0	✓	5092146 5103647
11 Loan Estimate	✓	3	3	1		5092147 5103648
12 Settlement Services Provider List	✓	2	1	1		5092148 5103649
13 Virginia Hazard Insurance Disclosure	✓	1	1	1		5092149 5103650
14 Virginia Lock in Agreement	✓	2	1	1		5092150 5103651
15 Your Home Loan Toolkit	✓	28	0	0	✓	5092151 5103652
16 appraisal	✓	8	2	1		5092286 5103767

The document that you added will appear at the bottom.



Lender Experience

Edit Document

The pencil icon here allows you to edit a document.

The screenshot displays the eSign Console interface for Steve Truitt. The top navigation bar includes 'Scheduler', 'Monitoring', 'Accounts', 'eSign Requests', 'Create Request', 'Search', and 'Account'. The main content area is titled 'Borrower's Certification, Authorization and Consent' and shows a document viewer with a signature line for 'JOHN SMITH'. A 'Documents' tab is active, showing a list of documents. A pencil icon is highlighted in the document list, indicating the edit function.

Document Name	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
1 Borrower's Certification, Aut															
2 Multistate Fixed Rate Note															
3 New Jersey Mortgage (MERS)															
4 Uniform Residential Loan Appli															
5 Uniform Residential Loan Appli															
6 Addendum to Closing Instruction															
7 Specific Closing Instructions															
8 Hazard Insurance Authorization a															
9 IVES Request for Transcript of Tax															
10 Closing Disclosure															
11 Customer Identification Verification															
12 Initial Escrow Account Disclosure Statement															
13 New Jersey Initial Tax Authorization Notice															
14 New Jersey Private Well Testing Act Certification															
15 Signature Affidavit and AKA Statement															

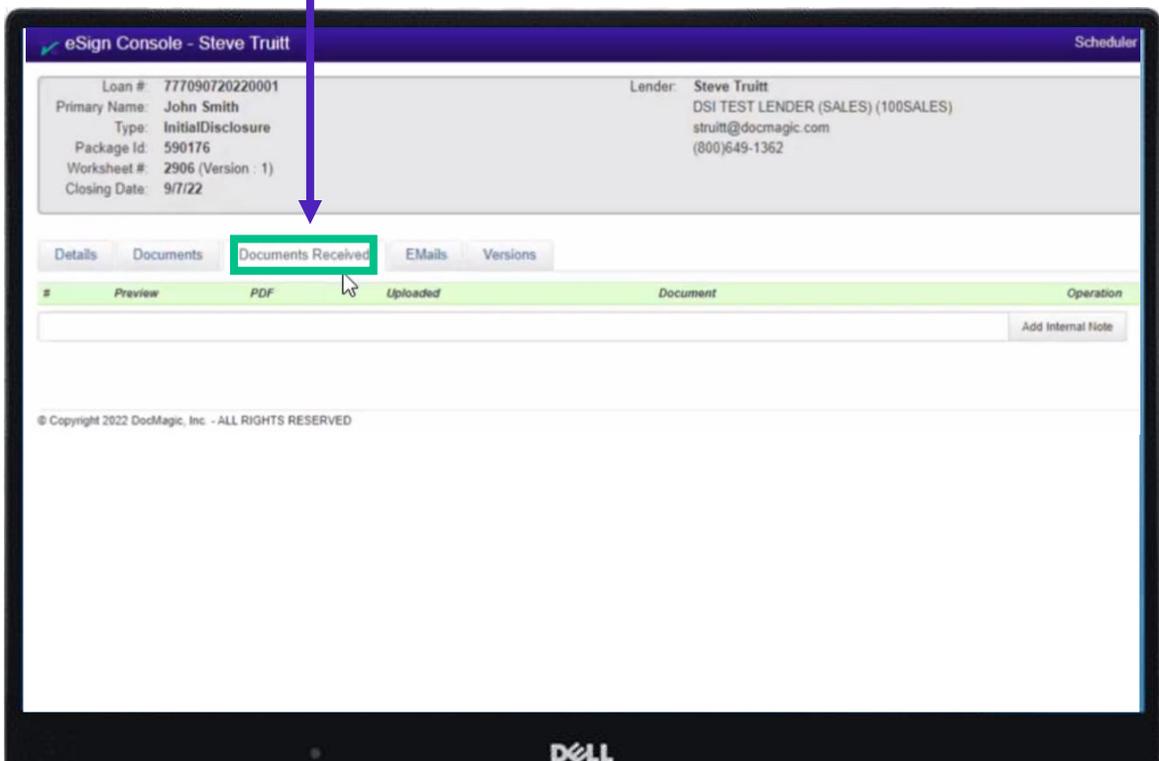
The Document Editor will open in another window. Click [here](#) for the guide.



Lender Experience

Documents Received

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



The screenshot displays the 'eSign Console - Steve Truitt' interface. At the top, there is a header with the user's name and a 'Scheduler' link. Below the header, a grey box contains loan details: Loan # 777090720220001, Primary Name John Smith, Type InitialDisclosure, Package Id 590176, Worksheet # 2906 (Version : 1), and Closing Date 9/7/22. To the right, lender information is shown: Lender Steve Truitt, DSI TEST LENDER (SALES) (100SALES), struitt@docmagic.com, and (800)649-1362. A navigation bar below the details includes tabs for Details, Documents, Documents Received (highlighted with a green box), EMail, and Versions. A table below the tabs has columns for #, Preview, PDF, Uploaded, Document, and Operation. A mouse cursor is positioned over the PDF column. At the bottom of the interface, there is a copyright notice: © Copyright 2022 DocMagic, Inc. - ALL RIGHTS RESERVED. The Dell logo is visible at the very bottom of the screen.



Lender Experience

Emails

Emails contain the invitations that you've sent out already.

eSign Console - Steve Truitt

Loan #: 777090720220001
Primary Name: John Smith
Type: InitialDisclosure
Package Id: 590176
Worksheet #: 2906 (Version : 1)
Closing Date: 9/7/22

Lender: Steve Truitt
DSI TEST LENDER (SALES) (100SALES)
struitt@docmagic.com
(800)649-1362

Details Documents Documents Received **Emails** Versions

Emails

Created	Event	To:
9/7/22, 11:04 AM	SendInvitation	struitt@docmagic.com
9/7/22, 11:04 AM	SendInvitation	struitt@docmagic.com
9/7/22, 11:04 AM	SendInvitation	struitt@docmagic.com
9/7/22, 11:04 AM	SendInvitation	struitt@docmagic.com
9/7/22, 11:17 AM	SendInvitation	struitt@docmagic.com
9/7/22, 11:19 AM	ConsentEsign	struitt@docmagic.com
9/7/22, 11:19 AM	ConsentEsign	struitt@docmagic.com
9/7/22, 11:19 AM	RESPASatisfied	struitt@docmagic.com

DELL



Lender Experience

Versions

If you have different versions of the loan package, they'll be here.

The screenshot displays the 'eSign Console - Steve Truitt' interface. At the top, there are two columns of loan details. The left column includes: Loan # 777090720220001, Primary Name: John Smith, Type: InitialDisclosure, Package Id: 590176, Worksheet #: 2906 (Version : 1), and Closing Date: 9/7/22. The right column includes: Lender: Steve Truitt, DSI TEST LENDER (SALES) (100SALES), struitt@docmagic.com, and (800)649-1362. Below the details is a navigation bar with tabs for Details, Documents, Documents Received, EMails, and Versions. The Versions tab is highlighted with a green box. Below the navigation bar is a table titled 'Versions' with the following data:

#	Package Type	Version	Package ID
1	Closing Documents	1	590174
2	Initial Disclosure	1	590176

The Dell logo is visible at the bottom center of the monitor frame.



Lender Experience

Milestones

This middle area shows the date and time that each milestone was completed for the participants. In the example below, the eSign event has been created but none of our participants have started the process.

The screenshot displays the eSign Console interface for a loan. The top navigation bar includes 'Scheduler', 'Monitoring', 'Accounts', 'eSign Requests', 'Create Request', 'Search', and 'Account'. The main content area is divided into several sections:

- Loan Details:** Loan #: 77710031350, Lender: Ron Carrillo, Status: New (Active), Documents: 15 (55 total pages), Signers: 3, Expires: N/A (Requires: Primary), Signatures: Y.
- Participants Table:** A table with columns for #, Name/Email, Role, Created, Started, Consented, Viewed, Completed, Declined, and Links. The 'Created' column is highlighted with a green box, and a blue arrow points from the text above to this column. All 'Created' timestamps are 10/3/22 1:54 PM.
- Action Log:** A table with columns for Date, User, IP Address, and Description. It shows three entries: 'eSign event created' by System User, and two 'Invitation sent to ron@docmagic.com' by John Smith and Andy Agent.

At the bottom, there are buttons for 'Cancel Request' and 'Delete Request', and a footer with copyright information and links to Home, Contact, Privacy Policy, and Terms of Use.

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



Lender Experience

Borrower's Signing Experience

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

The screenshot displays the DocMagic borrower signing experience. At the top left is the DocMagic logo. In the top right, the user is identified as 'JOHN SMITH Customer'. The interface includes navigation buttons for 'Review', 'Sign', and 'Completed'. The main heading is 'Initial Disclosure' with a sub-heading 'Borrower's Certification, Authorization and Consent'. A 'Start signing' button is located in the top right corner. The main content area contains the following text:

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.

Below the text are two signature lines. The first line is labeled 'Signature' and has 'Borrower JOHN SMITH' written below it. The second line is labeled 'Date' and has 'Borrower' written below it. A right-hand sidebar lists various documents for review, including '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 Record Change', and 'Loan Estimate'. The Dell logo is visible at the bottom center of the screen.

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](#).



Lender Experience

Post Borrower Signing

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

The screenshot displays the eSign Console interface for a loan. The top navigation bar includes 'Scheduler', 'Monitoring', 'Accounts', 'eSign Requests', 'Create Request', and 'Search'. The main header shows 'eSign Console - Steve Truitt' and 'Loan # 777890720220001'. The loan details section includes 'Lender: Steve Truitt', 'Primary Name: John Smith', 'Type: Initial Disclosure', 'Package Id: 590176', 'Worksheet #: 2906 (Version: 1)', and 'Closing Date: 9/7/22'. The status is 'In Progress (Active)' with 16 documents, 3 signers, and N/A expires. The 'Participants' table shows three rows: John Smith (Borrower), Andy Agent (Settlement Agent), and Stephen Truitt (Other). The 'Created', 'Started', 'Consented', 'Viewed', and 'Completed' columns for the borrower are highlighted with a green box. Below the participants table is the 'Action Log' table, which is also highlighted with a green box. The action log contains a list of events with columns for 'Date', 'User', 'IP Address', and 'Description'. A blue arrow points from the text box above to the 'Completed' column in the participants table, and another blue arrow points from the 'Action Log' table to the text box below.

#	Name/Email	Role	Created	Started	Consented	Viewed	Completed	Declined	Links
1	John Smith struitt@docmagic.com	Borrower	9/7/22 11:04 AM	9/7/22 11:19 AM	9/7/22 11:19 AM	9/7/22 11:19 AM	9/7/22 11:31 AM		Send Email Sign Documents 4506-C
3	Andy Agent struitt@docmagic.com	Settlement Agent	9/7/22 11:04 AM						Send Email Agent Portal
4	Stephen Truitt struitt21@gmail.com	Other	9/7/22 11:17 AM						Send Email Sign Documents

Date	User	IP Address	Description
9/7/22 11:04 AM	System User		eSign event created
9/7/22 11:04 AM	John Smith		Invitation sent to struitt@docmagic.com
9/7/22 11:04 AM	Andy Agent		Invitation sent to struitt@docmagic.com
9/7/22 11:07 AM	Steve Truitt		Stephen Truitt (struitt21@gmail.com) added as Other
9/7/22 11:07 AM	Stephen Truitt		Invitation sent to struitt21@gmail.com
9/7/22 11:09 AM	John Smith		Consented to DocMagic eSign
9/7/22 11:09 AM	John Smith		Receipt of early disclosures within 3 business days met
9/7/22 11:09 AM	John Smith		eSign event started
9/7/22 11:09 AM	John Smith		Initial Disclosure version 1 prepared on September 07, 2022, 11:04 AM PDT displayed
9/7/22 11:12 AM	Steve Truitt		Document batch upload completed
9/7/22 11:30 AM	System User		Date: 2022-09-07 11:30:05 InkSign Fax received for document: 5103643 ()
9/7/22 11:30 AM	John Smith		Authorization for the Social Security Administration to Release SSN Verification signed by John Smith
9/7/22 11:01 AM	John Smith		Approved electronic representation of signature
9/7/22 11:01 AM	John Smith		Approved electronic representation of signature
9/7/22 11:01 AM	John Smith		Borrower's Certification, Authorization and Consent signed by JOHN SMITH
9/7/22 11:01 AM	John Smith		Uniform Residential Loan Application signed by JOHN SMITH
9/7/22 11:01 AM	John Smith		Virginia Disclosure of Terms of Mortgage Application signed by JOHN SMITH
9/7/22 11:01 AM	John Smith		IVES Request for Transcript of Tax Return signed by JOHN SMITH
9/7/22 11:01 AM	John Smith		Important Information About Procedures For Opening A New Account signed by JOHN SMITH

The Action Log documents all the changes that occur.



Lender Experience

Icons

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

The screenshot displays the eSign Console interface for a loan package. The top navigation bar includes links for Scheduler, Monitoring, Accounts, eSign Requests, Create Request, Search, and a user profile icon. The header section provides loan details: Loan # 777890720220001, Lender Steve Truitt (DSI TEST LENDER (SALES) (100SALES)), Status In Progress (Active), Documents 16 (72 total pages), Signers 3, Expires N/A (Requires Primary), and Signatures Y (Ink Sign).

The 'Participants' table lists the following individuals:

#	Name/Email	Role	Created	Started	Consented	Viewed	Completed
1	John Smith struitt@docmagic.com	Borrower	9/7/22 11:04 AM	9/7/22 11:19 AM	9/7/22 11:19 AM	9/7/22 11:19 AM	9/7/22 11:19 AM
3	Andy Agent struitt@docmagic.com	Settlement Agent	9/7/22 11:04 AM				
4	Stephen Truitt struitt21@gmail.com	Other	9/7/22 11:17 AM				

The 'Action Log' table provides a detailed history of events:

Date	User	IP Address	Description
9/7/22 11:04 AM	System User		eSign event created
9/7/22 11:04 AM	John Smith		Invitation sent to struitt@docmagic.com
9/7/22 11:04 AM	Andy Agent		Invitation sent to struitt@docmagic.com
9/7/22 11:17 AM	Steve Truitt		Stephen Truitt (struitt21@gmail.com) added as Other
9/7/22 11:17 AM	Stephen Truitt		Invitation sent to struitt21@gmail.com
9/7/22 11:19 AM	John Smith		Consented to DocMagic eSign
9/7/22 11:19 AM	John Smith		Receipt of early disclosures within 3 business days met
9/7/22 11:19 AM	John Smith		eSign event started
9/7/22 11:19 AM	John Smith		Initial Disclosure version 1 prepared on September 07, 2022, 11:04 AM PDT displayed
9/7/22 11:22 AM	Steve Truitt		Document batch upload completed
9/7/22 11:30 AM	System User		Date: 2022-09-07 11:30:05 InkSign Fax received for document: 5103643 ()
9/7/22 11:30 AM	John Smith		Authorization for the Social Security Administration to Release SSN Verification signed by John Smith
9/7/22 11:31 AM	John Smith		Approved electronic representation of signature
9/7/22 11:31 AM	John Smith		Approved electronic representation of signature
9/7/22 11:31 AM	John Smith		Borrower's Certification, Authorization and Consent signed by JOHN SMITH
9/7/22 11:31 AM	John Smith		Uniform Residential Loan Application signed by JOHN SMITH
9/7/22 11:31 AM	John Smith		Virginia Disclosure of Terms of Mortgage Application signed by JOHN SMITH
9/7/22 11:31 AM	John Smith		IVES Request for Transcript of Tax Return signed by JOHN SMITH
9/7/22 11:31 AM	John Smith		Important Information About Procedures For Opening A New Account signed by JOHN SMITH

The toolbar at the top right of the main content area contains several icons: a green arrow pointing right, a PDF icon, a gold medal icon, a printer icon, a green circular refresh icon, and a green padlock icon. A blue arrow points from the text box above to the padlock icon, and another blue arrow points from the text box below to the refresh icon.

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



Lender Experience

Icons

The printer opens your printing options.

The screenshot displays the DocMagic eSign Console for a loan with ID 777890720220001. The interface includes a top navigation bar with options like Scheduler, Monitoring, Accounts, eSign Requests, Create Request, Search, and Account. The main content area is divided into sections: Loan Details, Participants, and Action Log. The Participants table lists four individuals: John Smith (Borrower), Andy Agent (Settlement Agent), and Stephen Truitt (Other). The Action Log provides a detailed timeline of events, including document creation, invitation sending, and document signing. A toolbar in the top right corner contains various icons, with the printer icon highlighted by a green box. A blue arrow points from the text 'The printer opens your printing options.' to this icon. Another blue arrow points from the text 'You can view the DocMagic eSign certificate by clicking here.' to the printer icon.

Name/Email	Role	Created	Started	Consented	Viewed	Completed
1 John Smith stluw@docmagic.com	Borrower	9/7/22 11:04 AM	9/7/22 11:19 AM	9/7/22 11:19 AM	9/7/22 11:19 AM	9/7/22 11:19 AM
3 Andy Agent stluw@docmagic.com	Settlement Agent	9/7/22 11:04 AM				
4 Stephen Truitt stluw221@gmail.com	Other	9/7/22 11:17 AM				

Date	User	IP Address	Description
9/7/22 11:04 AM	System User		eSign event created
9/7/22 11:04 AM	John Smith		Invitation sent to stluw@docmagic.com
9/7/22 11:04 AM	Andy Agent		Invitation sent to stluw@docmagic.com
9/7/22 11:17 AM	Steve Truitt		Stephen Truitt (stluw221@gmail.com) added as Other
9/7/22 11:17 AM	Stephen Truitt		Invitation sent to stluw221@gmail.com
9/7/22 11:19 AM	John Smith		Consented to DocMagic eSign
9/7/22 11:19 AM	John Smith		Receipt of early disclosures within 3 business days met
9/7/22 11:19 AM	John Smith		eSign event started
9/7/22 11:19 AM	John Smith		Initial Disclosure version 1 prepared on September 07, 2022, 11:04 AM PDT displayed
9/7/22 11:22 AM	Steve Truitt		Document batch upload completed
9/7/22 11:30 AM	System User		Date: 2022-09-07 11:30:05 InkSign Fax received for document: 5103643 ()
9/7/22 11:30 AM	John Smith		Authorization for the Social Security Administration to Release SSN Verification signed by John Smith
9/7/22 11:31 AM	John Smith		Approved electronic representation of signature
9/7/22 11:31 AM	John Smith		Approved electronic representation of signature
9/7/22 11:31 AM	John Smith		Borrower's Certification, Authorization and Consent signed by JOHN SMITH
9/7/22 11:31 AM	John Smith		Uniform Residential Loan Application signed by JOHN SMITH
9/7/22 11:31 AM	John Smith		Virginia Disclosure of Terms of Mortgage Application signed by JOHN SMITH
9/7/22 11:31 AM	John Smith		IVES Request for Transcript of Tax Return signed by JOHN SMITH
9/7/22 11:31 AM	John Smith		Important Information About Procedures For Opening A New Account signed by JOHN SMITH

You can view the DocMagic eSign certificate by clicking here.



Lender Experience

Certificate

The certificate mentioned previously downloads or opens as a PDF.

DocMagic eSign Certificate

eSign Id:	590176	Reference Id:	2906	From:	STEVE TRUITT	Status:	In Progress
Documents Type:	INITIAL DISCLOSURE	Loan Id:	777090720220001	Documents:	16	Signatures:	Y

List of Signers

Name/Email	Signature	Created Date	Started Date	Consented Date	Viewed Date	Completed Date
JOHN SMITH struitt@docmagic.com		09/07/22 11:04:27 AM	09/07/22 11:19:40 AM	09/07/22 11:19:40 AM	09/07/22 11:19:40 AM	09/07/22 11:31:52 AM
ANDY AGENT struitt@docmagic.com		09/07/22 11:04:28 AM				
STEPHEN TRUITT struitt221@gmail.com		09/07/22 11:17:26 AM				

Audit Log

Date/Time	Person	IP Address	Action
09/07/22 11:04:27 AM	SYSTEM USER		eSign event created
09/07/22 11:04:27 AM	JOHN SMITH	10.1.138.24	Invitation sent to struitt@docmagic.com
09/07/22 11:04:28 AM	ANDY AGENT	10.1.138.24	Invitation sent to struitt@docmagic.com
09/07/22 11:17:26 AM	STEPHEN TRUITT	10.1.10.201	Stephen Truitt (struitt221@gmail.com) added as Other
09/07/22 11:17:26 AM	STEPHEN TRUITT	10.1.10.201	Invitation sent to struitt221@gmail.com
09/07/22 11:19:39 AM	JOHN SMITH	10.1.10.201	Consented to DocMagic eSign
09/07/22 11:19:40 AM	JOHN SMITH	10.1.10.201	Receipt of early disclosures within 3 business days met
09/07/22 11:19:41 AM	JOHN SMITH	10.1.10.201	eSign event started
09/07/22 11:19:41 AM	JOHN SMITH	10.1.10.201	Initial Disclosure version 1 prepared on September 07, 2022, 11:04 AM PDT displayed
09/07/22 11:22:34 AM	STEVE TRUITT	10.1.138.22	Document batch upload completed
09/07/22 11:30:11 AM	SYSTEM USER		Date: 2022-09-07 11:30:09 InkSign Fax received for document: 5103643 ()



Lender Experience

Icons

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

The screenshot displays the eSign Console interface for a loan. The top navigation bar includes 'Scheduler', 'Monitoring', 'Accounts', 'eSign Requests', 'Create Request', and 'Search'. The main content area is divided into several sections:

- Loan Summary:** Loan # 777890720220001, Lender: Steve Truitt (DSI TEST LENDER (SALES) (100SALES)), Status: In Progress (Active), Documents: 16 (72 total pages), Signers: 3, Expires: N/A (Requires: Primary), Signatures: Y (Ink Sign).
- Participants Table:**

#	Name/Email	Role	Created	Started	Consented	Viewed	Completed
1	John Smith struitt@docmagic.com	Borrower	9/7/22 11:04 AM	9/7/22 11:19 AM	9/7/22 11:19 AM	9/7/22 11:19 AM	9/7/22 11:19 AM
3	Andy Agent struitt@docmagic.com	Settlement Agent	9/7/22 11:04 AM				
4	Stephen Truitt struitt21@gmail.com	Other	9/7/22 11:17 AM				
- Action Log Table:**

Date	User	IP Address	Description
9/7/22 11:04 AM	System User		eSign event created
9/7/22 11:04 AM	John Smith		Invitation sent to struitt@docmagic.com
9/7/22 11:04 AM	Andy Agent		Invitation sent to struitt@docmagic.com
9/7/22 11:17 AM	Steve Truitt		Stephen Truitt (struitt21@gmail.com) added as Other
9/7/22 11:17 AM	Stephen Truitt		Invitation sent to struitt21@gmail.com
9/7/22 11:19 AM	John Smith		Consented to DocMagic eSign
9/7/22 11:19 AM	John Smith		Receipt of early disclosures within 3 business days met
9/7/22 11:19 AM	John Smith		eSign event started
9/7/22 11:19 AM	John Smith		Initial Disclosure version 1 prepared on September 07, 2022, 11:04 AM PDT displayed
9/7/22 11:22 AM	Steve Truitt		Document batch upload completed
9/7/22 11:30 AM	System User		Date: 2022-09-07 11:30:05 InkSign Fax received for document: 5103643 ()
9/7/22 11:30 AM	John Smith		Authorization for the Social Security Administration to Release SSN Verification signed by John Smith
9/7/22 11:31 AM	John Smith		Approved electronic representation of signature
9/7/22 11:31 AM	John Smith		Approved electronic representation of signature
9/7/22 11:31 AM	John Smith		Borrower's Certification, Authorization and Consent signed by JOHN SMITH
9/7/22 11:31 AM	John Smith		Uniform Residential Loan Application signed by JOHN SMITH
9/7/22 11:31 AM	John Smith		Virginia Disclosure of Terms of Mortgage Application signed by JOHN SMITH
9/7/22 11:31 AM	John Smith		IVES Request for Transcript of Tax Return signed by JOHN SMITH
9/7/22 11:31 AM	John Smith		Important Information About Procedures For Opening A New Account signed by JOHN SMITH

We recommend that you save the document sets after all signatures are collected, as you will only have a loan document set in the portal for 90 days.



Lender Experience

Settlement Agent Portal

If applicable, the Settlement Agents will arrive at their Settlement Agent Portal to make sure the process is smooth and complete.

DocMagic eClose Console (Settlement Agent) Andy

LOAN Loan #: 070620220001
Primary Borrower: John Smith
Type: EClosing
Package ID: 558436
Worksheet #: 2704 (Version: 1)

LENDER
Company: DSI TEST LENDER (SALES)
Contact: Steve Truitt
Email: struitt@docmagic.com
Phone: (800) 649-1362

COUNTDOWN TO CLOSING
DAYS: - HOURS: - MINUTES: - SECONDS: -
Date: Jul 6, 2022 (Wed) Time: 12:00am PDT

[Details](#) [eJournal](#) [Action Log](#)

Signers (3)

#	Signer Name / Email	Role	KBA / Status	ID Verify / Status	Status	eSign
1	John Smith struitt@docmagic.com	Borrower			● Ready to Sign	Open Signing Room
2	Andy Agent struitt@docmagic.com	Settlement Agent			● Ready to Sign	Open Signing Room
3	Stephen Truitt struitt221@gmail.com	Other				Open Signing Room

Documents (17) [Print](#) [Edit](#) [New](#) [Share](#) [Refresh](#) Preview Mode OFF

#	eSign Enabled	Page(s)	Signer(s)	Completed
1	Borrower's Certification, Authorization and Consent	2	1	✓
2	Uniform Residential Loan Application	7	1	✓
3	Uniform Residential Loan Application - Lender Loan Information	2	0	✓

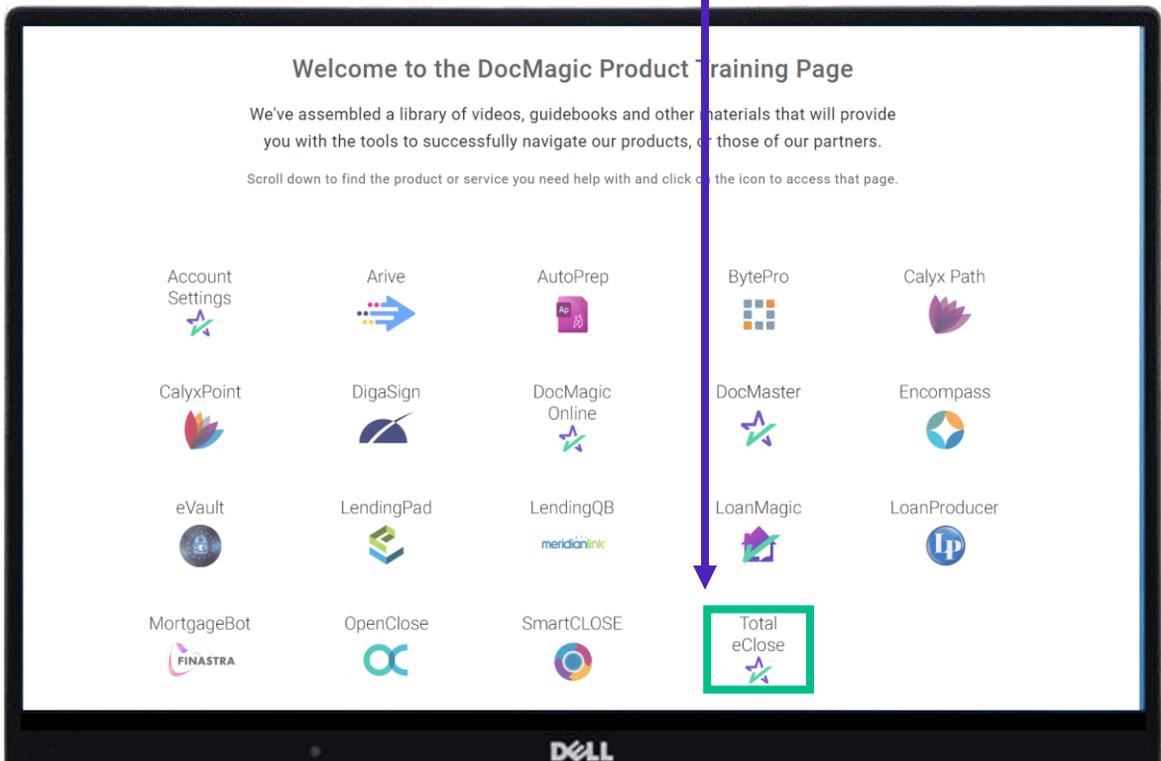
DELL



Lender Experience

Settlement Agent Training

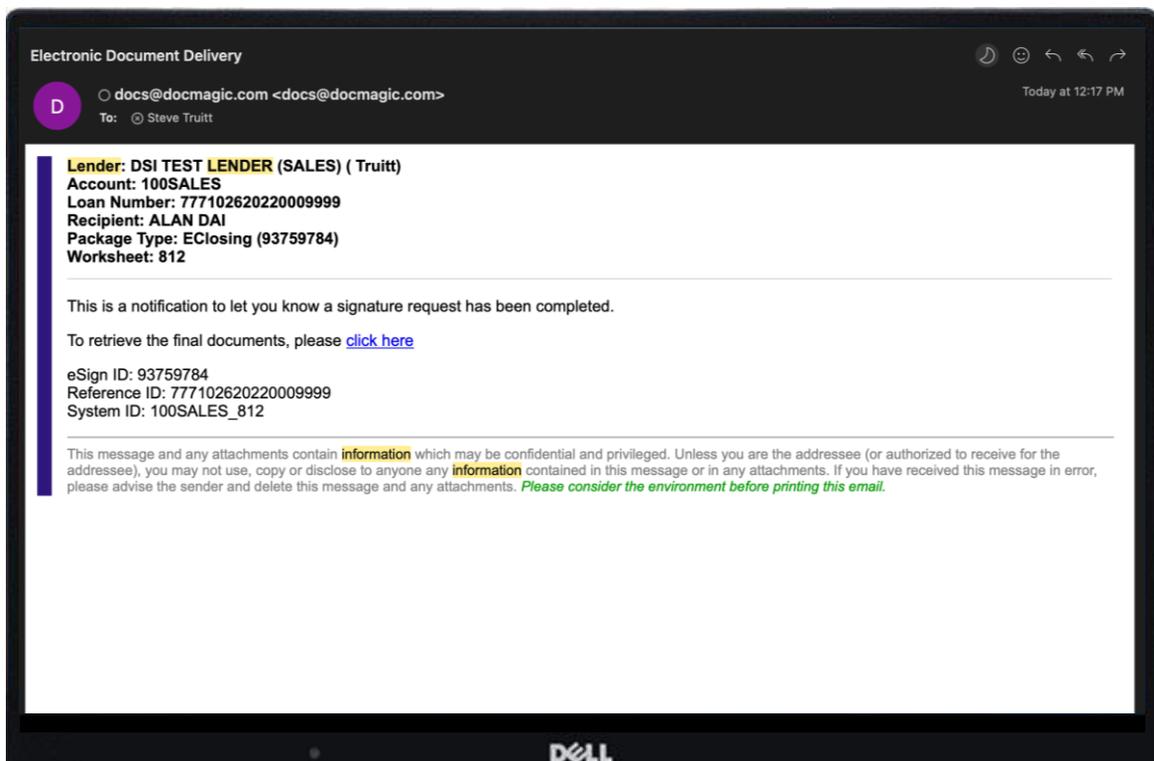
You can view a training on the [Settlement Agent experience](#) right here in the Total eClose widget on our [Product Training Page](#).



Lender Experience

Email Confirmation

You'll receive email confirmations along the way, as well as confirmation that all signatures have been obtained and the process is complete.



Lender Experience

Return to the eSign Console

Once complete, you'll be alerted via e-mail, and you can return to the eSign console where you'll see verification that all signatures have been collected.

The screenshot displays the eSign Console interface for a loan. The top navigation bar includes links for Scheduler, Monitoring, Accounts, eSign Requests, Create Request, Search, and Account. The main content area shows loan details for loan # 070620220001, primary name John Smith, and lender Steve Truitt. The status is 'Signed (Active)'. Below the details are tabs for Details, Documents, Documents Received, EMail, and Versions. A 'Participants' table is highlighted with a green box, showing the roles and completion status of participants. Below the table is an 'Action Log' section.

#	Name/Email	Role	Created	Started	Consented	Viewed	Completed	Declined	Links	Fix
1	John Smith struitt@docmagic.com	Borrower	7/6/22 11:47 AM	7/6/22 11:54 AM	7/6/22 11:54 AM	7/6/22 11:54 AM	7/6/22 11:57 AM		Send Email Sign Documents	4506-C
3	Andy Agent struitt@docmagic.com	Settlement Agent	7/6/22 11:47 AM	7/6/22 11:53 AM	7/6/22 11:53 AM	7/6/22 11:53 AM	7/6/22 11:54 AM		Send Email Agent Portal	
4	Stephen Truitt struitt221@gmail.com	Other	7/6/22 11:52 AM						Send Email	

Date	User	IP Address	Description
7/6/22 11:47 AM	System User		eSign event created
7/6/22 11:47 AM	John Smith		Invitation sent to struitt@docmagic.com
7/6/22 11:47 AM	Andy Agent		Invitation sent to struitt@docmagic.com
7/6/22 11:51 AM	Steve Truitt		Document batch upload completed
7/6/22 11:52 AM	Steve Truitt		Stephen Truitt (struitt221@gmail.com) added as Other
7/6/22 11:52 AM	Stephen Truitt		Invitation sent to struitt221@gmail.com
7/6/22 11:53 AM	System User		Preview Mode was enabled
7/6/22 11:53 AM	System User		Preview Mode was disabled
7/6/22 11:53 AM	Andy Agent		Consented to DocMagic eSign
7/6/22 11:53 AM	Andy Agent		eSign event started
7/6/22 11:53 AM	Andy Agent		Closing Documents version 1 prepared on July 06, 2022, 11:47 AM PDT displayed
7/6/22 11:54 AM	Andy Agent		Approved electronic representation of signature



Lender Experience

Return to the eSign Console

You can review the process.

The screenshot displays the eSign Console interface for a loan. The top navigation bar includes links for Scheduler, Monitoring, Accounts, eSign Requests, Create Request, Search, and Account. The main content area is divided into several sections:

- Loan Details:** Loan #: 070620220001, Primary Name: John Smith, Type: EClosing, Package Id: 558436, Worksheet #: 2704 (Version : 1), Closing Date: 7/6/22.
- Lender Information:** Lender: Steve Truitt, DSI TEST LENDER (SALES) (100SALES), struitt@docmagic.com, (800)649-1362.
- Status:** Signed (Active), Documents: 17 (66 total pages), Signers: 3, Expires: N/A (Requires: Primary), Signatures: Y (Ink Sign).
- Navigation Tabs:** Details, Documents, Documents Received, EMail, Versions.
- Participants Table:**

#	Name/Email	Role	Created	Started	Consented	Viewed	Completed	Declined	Links	Fix
1	John Smith struitt@docmagic.com	Borrower	7/6/22 11:47 AM	7/6/22 11:54 AM	7/6/22 11:54 AM	7/6/22 11:54 AM	7/6/22 11:57 AM		Send Email Sign Documents	4506-C
3	Andy Agent struitt@docmagic.com	Settlement Agent	7/6/22 11:47 AM	7/6/22 11:53 AM	7/6/22 11:53 AM	7/6/22 11:53 AM	7/6/22 11:54 AM		Send Email Agent Portal	
4	Stephen Truitt struitt221@gmail.com	Other	7/6/22 11:52 AM						Send Email	

- Action Log Table:**

Date	User	IP Address	Description
7/6/22 11:47 AM	System User		eSign event created
7/6/22 11:47 AM	John Smith		Invitation sent to struitt@docmagic.com
7/6/22 11:47 AM	Andy Agent		Invitation sent to struitt@docmagic.com
7/6/22 11:51 AM	Steve Truitt		Document batch upload completed
7/6/22 11:52 AM	Steve Truitt		Stephen Truitt (struitt221@gmail.com) added as Other
7/6/22 11:52 AM	Stephen Truitt		Invitation sent to struitt221@gmail.com
7/6/22 11:53 AM	System User		Preview Mode was enabled
7/6/22 11:53 AM	System User		Preview Mode was disabled
7/6/22 11:53 AM	Andy Agent		Consented to DocMagic eSign
7/6/22 11:53 AM	Andy Agent		eSign event started
7/6/22 11:53 AM	Andy Agent		Closing Documents version 1 prepared on July 06, 2022, 11:47 AM PDT displayed
7/6/22 11:54 AM	Andy Agent		Approved electronic representation of signature

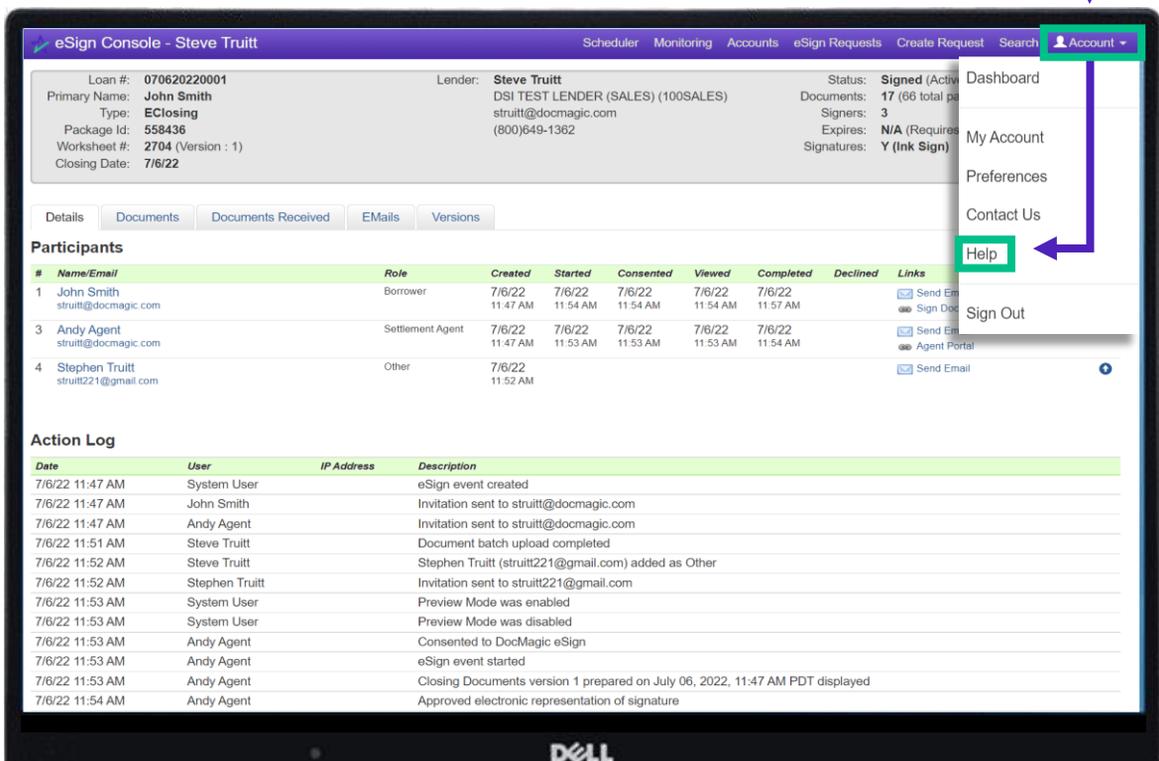
You can also review the Action Log.



Lender Experience

Additional Resources

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



The screenshot displays the eSign Console interface for a user named Steve Truitt. The top navigation bar includes links for Scheduler, Monitoring, Accounts, eSign Requests, Create Request, Search, and Account. The Account menu is open, showing options like Dashboard, My Account, Preferences, Contact Us, Help, and Sign Out. The Help option is highlighted with a green box. Below the navigation bar, the main content area shows loan details for Loan # 070620220001, Lender: Steve Truitt, and Status: Signed (Active). The Participants table lists four users: John Smith (Borrower), Andy Agent (Settlement Agent), and Stephen Truitt (Other). The Action Log table shows a series of events from 7/6/22 11:47 AM to 11:54 AM, including eSign event creation, invitation sending, document upload, and consent.

#	Name/Email	Role	Created	Started	Consented	Viewed	Completed	Declined	Links
1	John Smith struitt@docmagic.com	Borrower	7/6/22 11:47 AM	7/6/22 11:54 AM	7/6/22 11:54 AM	7/6/22 11:54 AM	7/6/22 11:57 AM		Send Email Sign Doc
3	Andy Agent struitt@docmagic.com	Settlement Agent	7/6/22 11:47 AM	7/6/22 11:53 AM	7/6/22 11:53 AM	7/6/22 11:53 AM	7/6/22 11:54 AM		Send Email Agent Portal
4	Stephen Truitt struitt221@gmail.com	Other	7/6/22 11:52 AM						Send Email

Date	User	IP Address	Description
7/6/22 11:47 AM	System User		eSign event created
7/6/22 11:47 AM	John Smith		Invitation sent to struitt@docmagic.com
7/6/22 11:47 AM	Andy Agent		Invitation sent to struitt@docmagic.com
7/6/22 11:51 AM	Steve Truitt		Document batch upload completed
7/6/22 11:52 AM	Steve Truitt		Stephen Truitt (struitt221@gmail.com) added as Other
7/6/22 11:52 AM	Stephen Truitt		Invitation sent to struitt221@gmail.com
7/6/22 11:53 AM	System User		Preview Mode was enabled
7/6/22 11:53 AM	System User		Preview Mode was disabled
7/6/22 11:53 AM	Andy Agent		Consented to DocMagic eSign
7/6/22 11:53 AM	Andy Agent		eSign event started
7/6/22 11:53 AM	Andy Agent		Closing Documents version 1 prepared on July 06, 2022, 11:47 AM PDT displayed
7/6/22 11:54 AM	Andy Agent		Approved electronic representation of signature

You can find more training materials on the eSign Console by visiting our [Product Training Page](#).



eSign Console/Lender Portal

Create Request

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

The screenshot shows the eSign Console interface for a loan. The top navigation bar includes 'Scheduler', 'Monitoring', 'Accounts', 'eSign Requests', 'Create Request', 'Search', and 'Account'. The 'Create Request' button is highlighted with a red box. Below the navigation bar, the loan details are displayed, including the loan number, lender information, and status. The 'Participants' section shows a table with columns for Name/Email, Role, Created, Started, Consented, Viewed, Completed, Declined, and Links. The 'Action Log' section shows a list of events with columns for Date, User, IP Address, and Description.

#	Name/Email	Role	Created	Started	Consented	Viewed	Completed	Declined	Links	
1	John Smith struitt@docmagic.com	Borrower	9/7/22 11:04 AM	9/7/22 11:19 AM	9/7/22 11:19 AM	9/7/22 11:19 AM	9/7/22 11:31 AM		Send Email Sign Documents	4506-C
3	Andy Agent struitt@docmagic.com	Settlement Agent	9/7/22 11:04 AM						Send Email Agent Portal	
4	Stephen Truitt struitt21@gmail.com	Other	9/7/22 11:17 AM						Send Email Sign Documents	

Date	User	IP Address	Description
9/7/22 11:04 AM	System User		eSign event created
9/7/22 11:04 AM	John Smith		Invitation sent to struitt@docmagic.com
9/7/22 11:04 AM	Andy Agent		Invitation sent to struitt@docmagic.com
9/7/22 11:17 AM	Steve Truitt		Stephen Truitt (struitt21@gmail.com) added as Other
9/7/22 11:17 AM	Stephen Truitt		Invitation sent to struitt21@gmail.com
9/7/22 11:19 AM	John Smith		Consented to DocMagic eSign
9/7/22 11:19 AM	John Smith		Receipt of early disclosures within 3 business days met
9/7/22 11:19 AM	John Smith		eSign event started
9/7/22 11:19 AM	John Smith		Initial Disclosure version 1 prepared on September 07, 2022, 11:04 AM PDT displayed
9/7/22 11:22 AM	Steve Truitt		Document batch upload completed
9/7/22 11:30 AM	System User		Date: 2022-09-07 11:30:05 InkSign Fax received for document: 5103643 ()
9/7/22 11:30 AM	John Smith		Authorization for the Social Security Administration to Release SSN Verification signed by John Smith
9/7/22 11:31 AM	John Smith		Approved electronic representation of signature
9/7/22 11:31 AM	John Smith		Approved electronic representation of signature
9/7/22 11:31 AM	John Smith		Borrower's Certification, Authorization and Consent signed by JOHN SMITH
9/7/22 11:31 AM	John Smith		Uniform Residential Loan Application signed by JOHN SMITH
9/7/22 11:31 AM	John Smith		Virginia Disclosure of Terms of Mortgage Application signed by JOHN SMITH
9/7/22 11:31 AM	John Smith		IVES Request for Transcript of Tax Return signed by JOHN SMITH
9/7/22 11:31 AM	John Smith		Important Information About Procedures For Opening A New Account signed by JOHN SMITH

Click on the Bonus Material section on the [Lender's Product Training Page](#) for details.

