

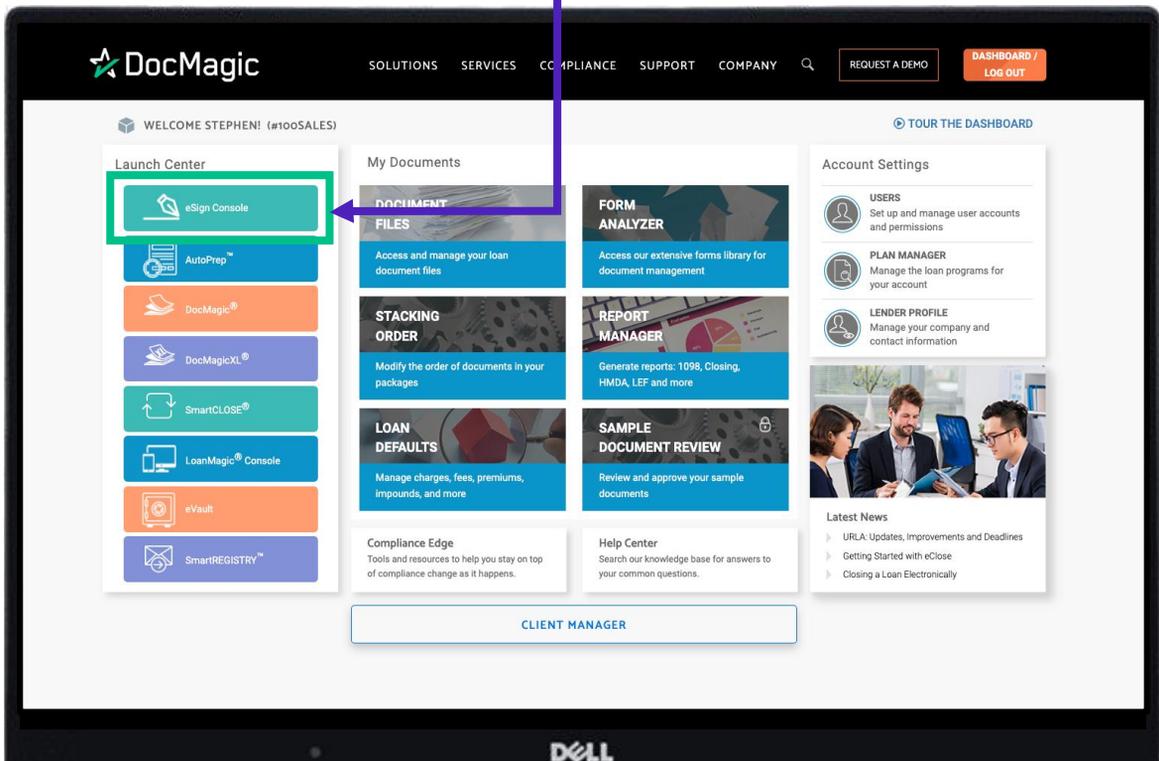


Running a CSV Report
From Your eSign Console

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If you want to run a report of all transactions within your eSign console, log in and click on Dashboard, then eSign Console.



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Once inside, click on "Search"

The screenshot displays the eSign Console interface for Stephen Truitt. The top navigation bar includes links for Scheduler, Monitoring, Accounts, eSign Requests, Create Request, Search, and Account. The 'Search' button is highlighted with a green box. Below the navigation bar, the 'Active Requests' section shows a list of 31 items. The table columns are: Loan # (Document Set), Signer (Email), Status (Worksheet #), Wc, Created, CS, IS, RESPA, PDF, and Archive. The table contains various rows with details such as loan numbers, signer names, and document types.

Loan # Document Set	Signer Email	Status Worksheet #	Wc	Created	CS	IS	RESPA	PDF	Archive
777062020240001 Closing Documents	Stephen Truitt (+4) sttruitt@docmagic.com	New 1341	1	6/20/24 9:40 AM	✓				
777061820240001 Closing Documents	Stephen Truitt (+4) sttruitt@docmagic.com	Signed 1339	1	6/18/24 10:03 AM	✓				
3306170743 Initial Disclosure	Ron Sample (+1) ron@docmagic.com	Signed 1338	1	6/17/24 7:50 AM	✓				
777061320240001 Closing Documents	Stephen Truitt (+4) sttruitt@docmagic.com	New 1336	1	6/13/24 9:28 AM	✓				
777061120240001 Closing Documents	Stephen Truitt (+4) sttruitt@docmagic.com	New 1333	1	6/11/24 9:33 AM	✓				
Custom Request Standard Documents	John Smith ron@docmagic.com	Signed 1338	1	6/10/24 11:50 AM	✓				
3306071128 Closing Documents	Ron Sample (+1) ron@docmagic.com	New 1329	1	6/7/24 11:29 AM	✓	✓			
3306070905 Closing Documents	Ron Sample (+1) ron@docmagic.com	Signed 1328	1	6/7/24 9:07 AM	✓	✓			
777060920240001 Closing Documents	Stephen Truitt (+4) sttruitt@docmagic.com	Signed 1326	1	6/6/24 9:43 AM	✓				
77706060933 Closing Documents	Leah Sommerville (+1) LEAH@docmagic.com	In Progress 1319	2	6/6/24 8:07 AM	✓	✓			
333060520240001 Loan Application	Jane Jakowski (+1) wjg21@gmail.com	New 1318	1	6/5/24 10:58 AM	✓				
777060420240001 Closing Documents	Stephen Truitt (+4) sttruitt@docmagic.com	Signed 1316	1	6/4/24 8:31 AM	✓				
777060320240001 Closing Documents	Stephen Truitt (+4) sttruitt21@gmail.com	In Progress 1315	1	6/3/24 1:42 PM	✓				
77706031345 Closing Documents	John Smith (+2) leah@docmagic.com	New 1314	1	6/3/24 11:47 AM	✓				
77705031411 Closing Documents	Leah Sommerville (+2) LEAH@docmagic.com	In Progress 1314	1	5/30/24 12:11 PM	✓	✓			
777053020240001 Closing Documents	Stephen Truitt (+4) sttruitt@docmagic.com	New 1312	1	5/30/24 9:10 AM	✓				
77705302024 Closing Documents	Leah Sommerville (+1) LEAH@docmagic.com	Consented 1311	2	5/30/24 8:20 AM	✓	✓			
77705300931 Closing Documents	Leah Sommerville (+1) LEAH@docmagic.com	New 1308	1	5/30/24 7:31 AM	✓	✓			
3305291300 Initial Disclosure	John Smith (+1) ron@docmagic.com	Signed 1307	1	5/29/24 1:17 PM	✓				
3305290830 Closing Documents	John Smith (+1) ron@docmagic.com	In Progress 1306	2	5/29/24 9:37 AM	✓	✓			
77705282024001 Closing Documents	Stephen Truitt (+4) sttruitt@docmagic.com	Signed 1305	1	5/28/24 7:59 AM	✓				



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You can narrow your search by typing in the information fields below or broaden your search by leaving them blank and un-checking "Active" to show all transactions.

The screenshot displays the eSign Console interface for Stephen Truitt. The top navigation bar includes links for Scheduler, Monitoring, Accounts, eSign Requests, Create Request, Search, and Account. The main content area features a 'Filter Search' section with various input fields: Loan #, Name, Status (dropdown), Worksheet #, Email, Type (dropdown), Account # (set to 100SALES), Closing From, To, Create From (set to 2024-05-20), and User (dropdown). A blue arrow points to the 'Active' checkbox, which is currently checked. Below the filter search is a table titled 'Active Requests Showing 1 - 31 of 31'. The table has columns for Loan #, Signer, Status, Ver, Created, CS, IS, RESPA, PDF, and Archive. A blue arrow points to a CSV icon in the top right corner of the table.

Loan #	Signer	Status	Ver	Created	CS	IS	RESPA	PDF	Archive
7770620240001 Closing Documents	Stephen Truitt (+4) sttrutt@domagic.com	New 1341	1	6/20/24 9:40 AM	✓				
777061820240001 Closing Documents	Stephen Truitt (+4) sttrutt@domagic.com	Signed 1339	1	6/18/24 10:03 AM	✓				
3306170743 Initial Disclosure	Ron Sample (+1) ron@domagic.com	Signed 1338	1	6/17/24 7:50 AM					
777061320240001 Closing Documents	Stephen Truitt (+4) sttrutt@domagic.com	New 1336	1	6/13/24 9:29 AM	✓				
777061120240001 Closing Documents	Stephen Truitt (+4) sttrutt@domagic.com	New 1333	1	6/11/24 9:23 AM	✓				
Custom_Request Standard Documents	John Smith ron@domagic.com	Signed	1	6/10/24 11:50 AM	✓				
3306071128 Closing Documents	Ron Sample (+1) ron@domagic.com	New 1329	1	6/7/24 11:29 AM	✓	✓			
3306070905 Closing Documents	Ron Sample (+1) ron@domagic.com	Signed 1328	1	6/7/24 9:07 AM	✓	✓			
777060620240001 Closing Documents	Stephen Truitt (+4) sttrutt@domagic.com	Signed 1326	1	6/6/24 9:43 AM	✓				
77706060933 Closing Documents	Leah Sommerville (+1) LEAH@domagic.com	In Progress 1319	2	6/6/24 8:07 AM		✓			
333060520240001 Loan Application	Jane Jakowski (+1) wjg21@gamil.com	New 1318	1	6/5/24 10:53 AM	✓				
777060420240001	Stephen Truitt (+4)	Signed	1	6/4/24					

Finally, just click on the CSV prompt here to create the report.

