DocMagic
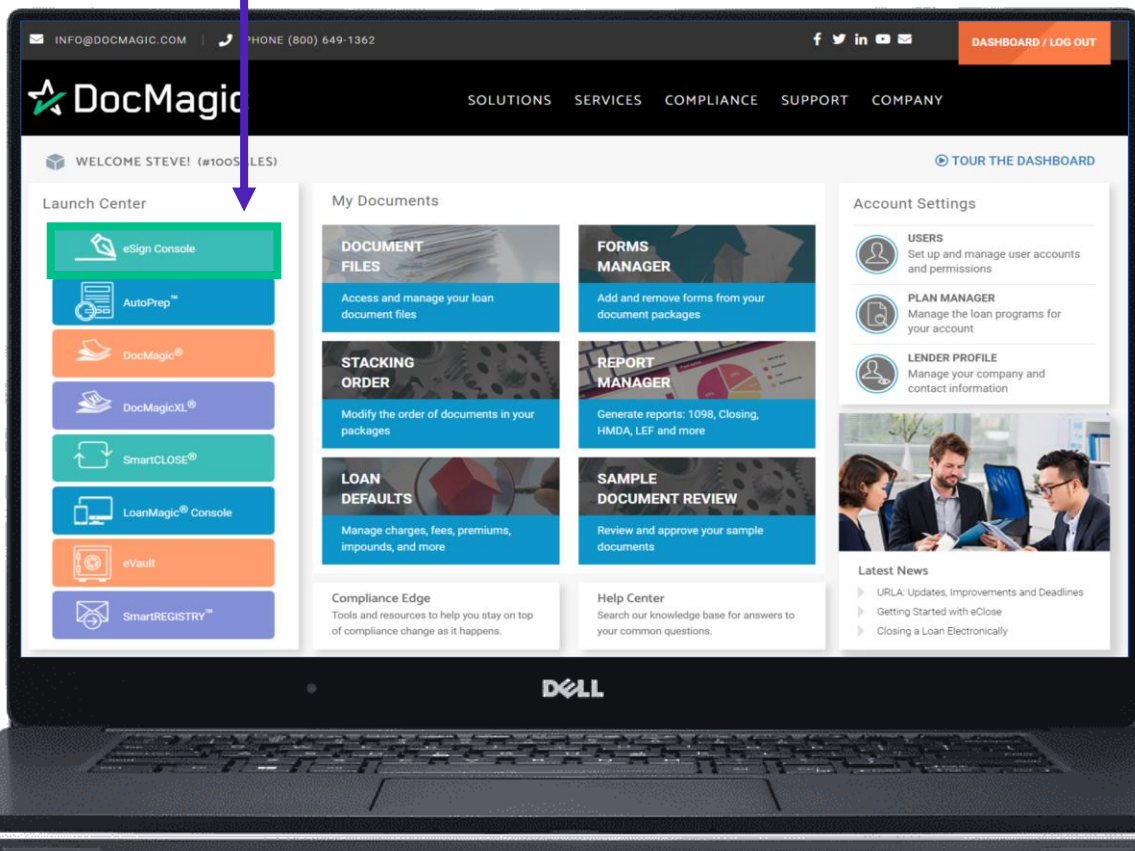
eSign Console
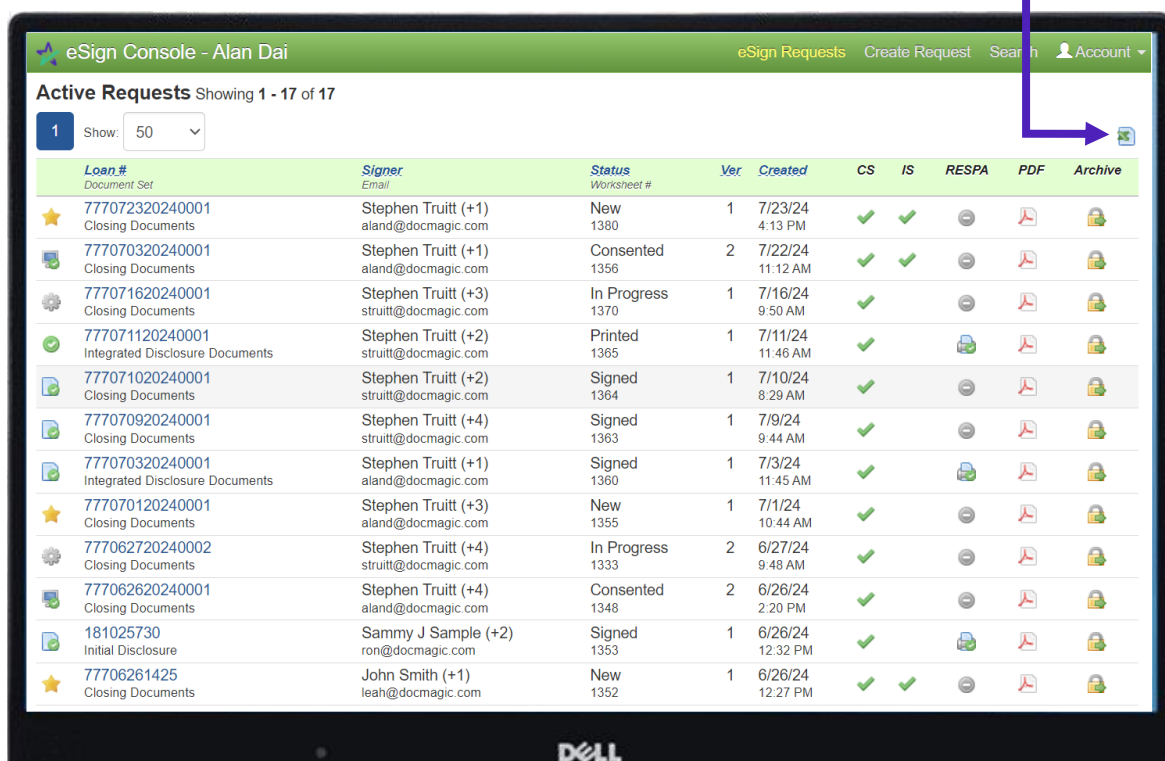Lender Portal

Getting Started

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

eSign Console/Lender Portal

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.

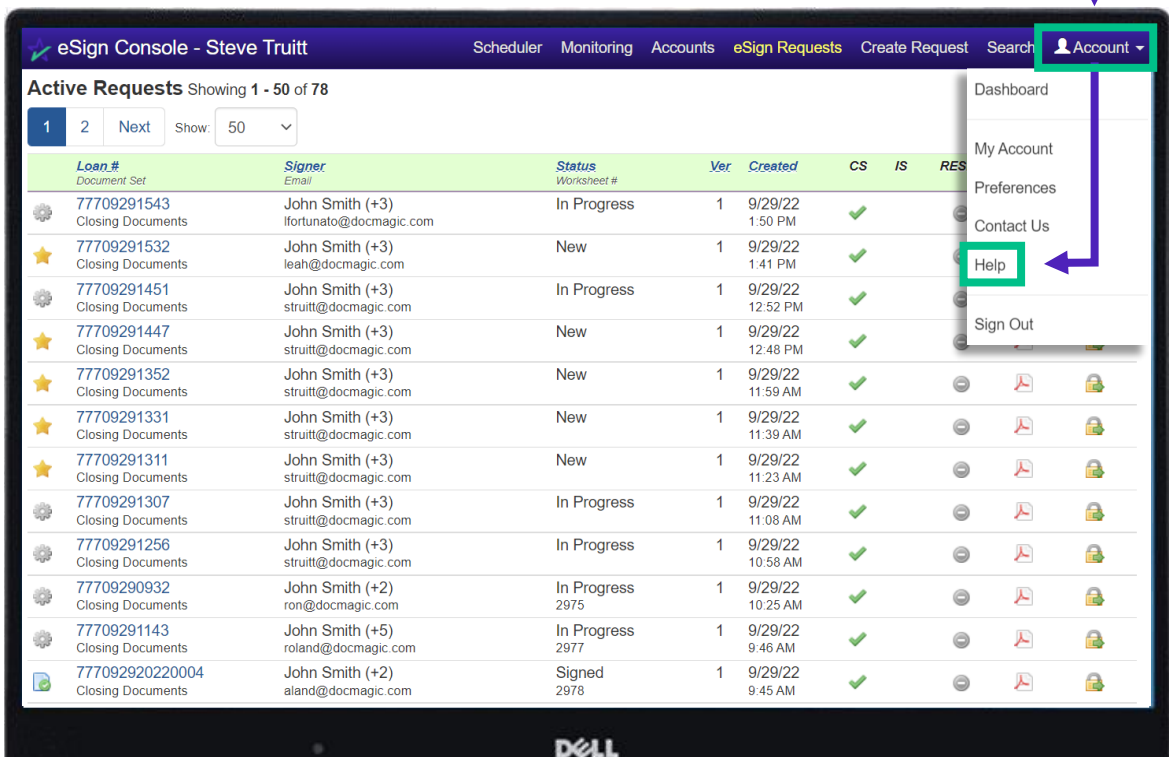*It's crucial that you know that these loan packages will only be present on this console for 90 days after generation.* After all signatures are collected, it's a good idea to download all signed documents to your desktop. This will be shown towards the end of the guide.

eSign Console/Lender Portal

Help Button

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

eSign Console/Lender Portal

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

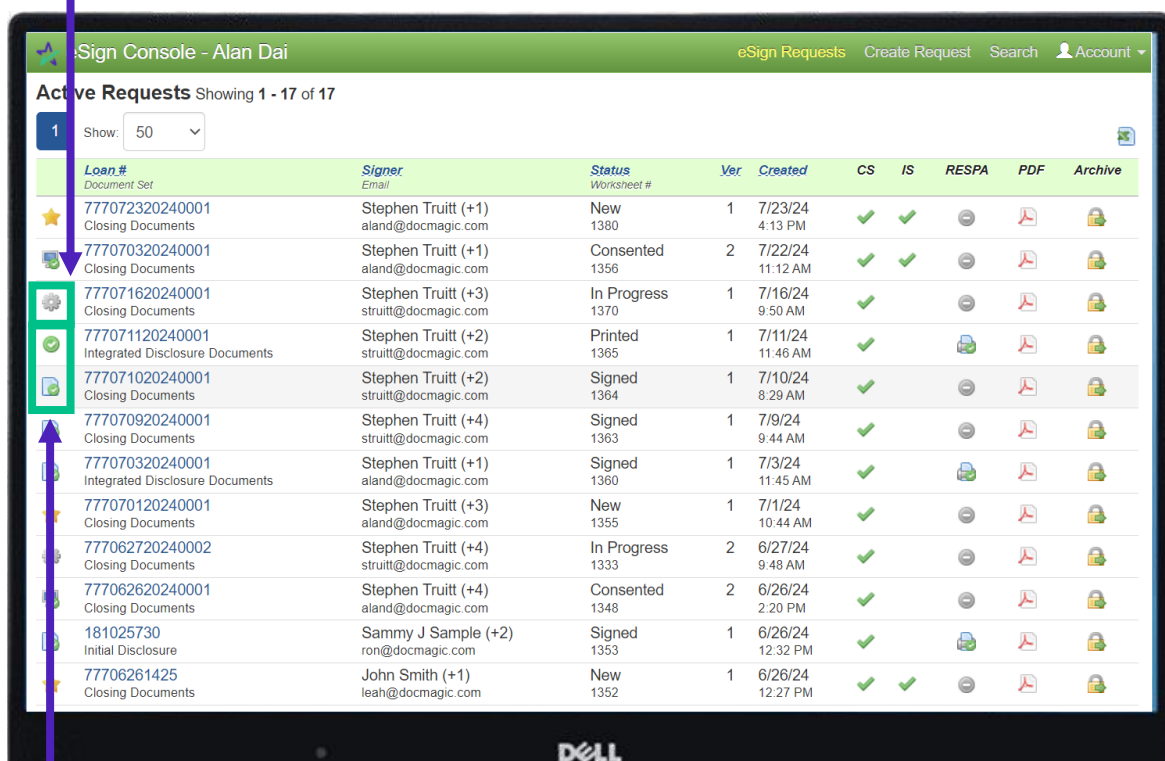| Loan # Document Set	Signer Email	Status Worksheet #	Ver	Created	CS	IS	RESPA	PDF	Archive
777072320240001 Closing Documents	Stephen Truitt (+1) aland@docmagic.com	New 1380	1	7/23/24 4:13 PM	✔	✔	⊖	📄	🔒
777070320240001 Closing Documents	Stephen Truitt (+1) aland@docmagic.com	Consented 1356	2	7/22/24 11:12 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	✔	✔	⊖	📄	🔒

DELL

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

eSign Console/Lender Portal

Status Icons

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

eSign Console - Alan Dai | eSign Requests | Create Request | Search | Account ▾

Active Requests Showing **1 - 17** of **17**

Show: 50

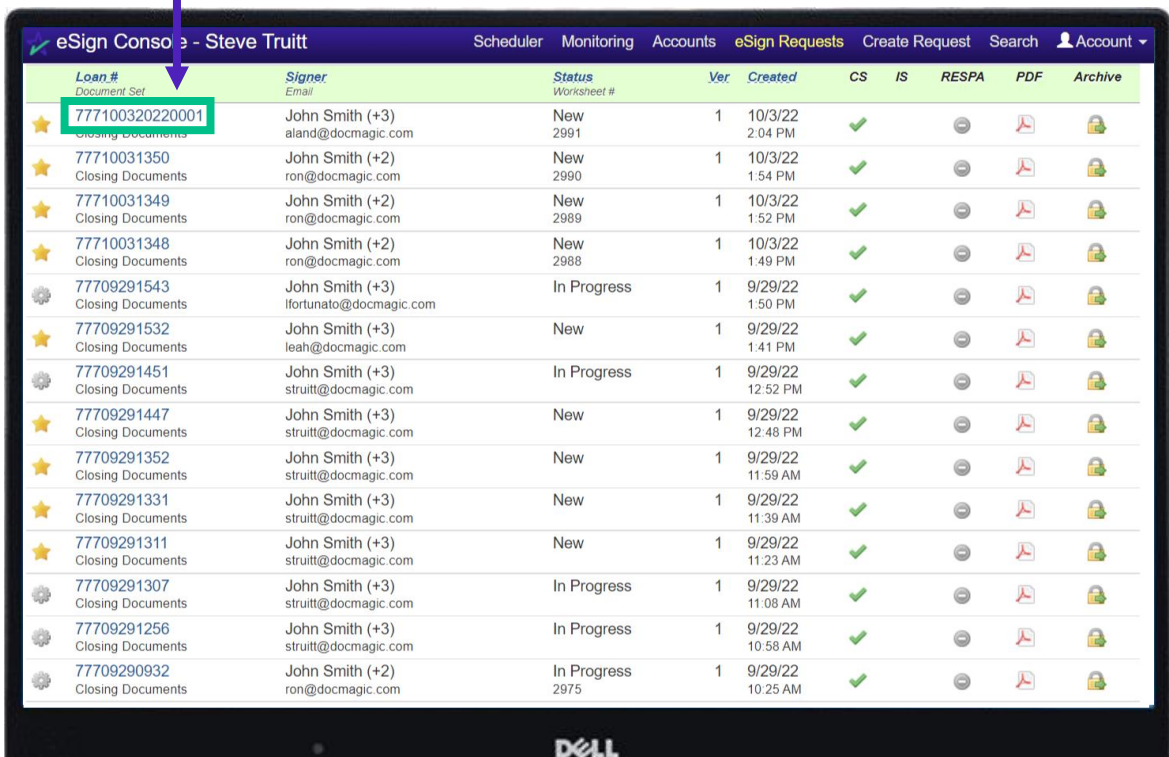|	Loan # Document Set	Signer Email	Status Worksheet #	Ver	Created	CS	IS	RESPA	PDF	Archive
⭐	777072320240001 Closing Documents	Stephen Truitt (+1) aland@docmagic.com	New 1380	1	7/23/24 4:13 PM	✔	✔	⊖	📄	🔒
	777070320240001 Closing Documents	Stephen Truitt (+1) aland@docmagic.com	Consented 1356	2	7/22/24 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	✔	✔	⊖	📄	🔒

DELL

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*.

Opening a Document Set

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

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

	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	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	✔		⊖	📄	🔒

DELL

Key Info

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

---

eSign Console - Steve Truitt

Scheduler Monitoring Accounts eSign Requests Create Request Search Account ▾

Return to Search

Loan #:	77710031350	Lender:	**Ron Carrillo**	
Primary Name:	**John Smith**		DSI TEST LENDER (SALES) (100SALES)	
Type:	**EClosing**		ron@docmagic.com	
Package Id:	**604282**		(708)531-9060	
Worksheet #:	**2990** (Version : 1)			
Closing Date:	**9/30/22**			

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

Details | Documents | Documents Received | EMails | 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

Home Contact Privacy Policy Terms of Use

DELL

eSign Console/Lender Portal

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.

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.

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

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.

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	EMails	Versions

Preview Mode - Off

Participants 👤+

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

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

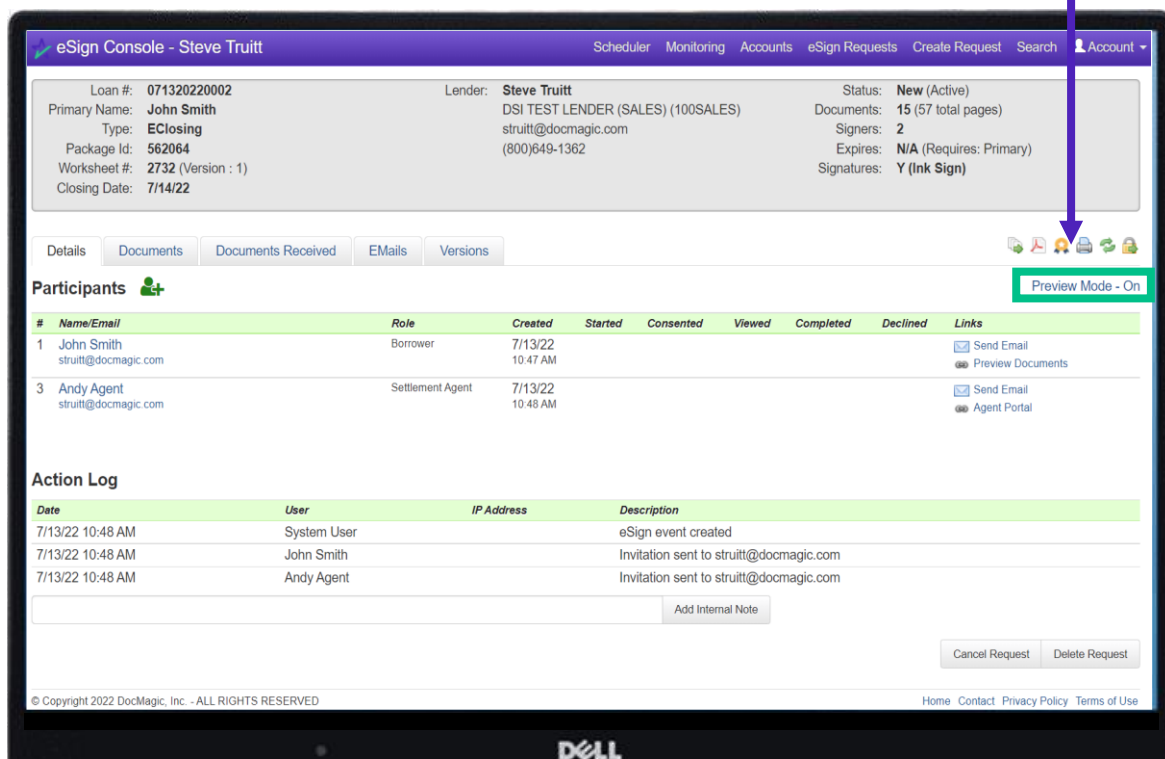Add Internal Note

Cancel Request   Delete Request

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DELL

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.

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

eSign Console - Steve Truitt

Scheduler Monitoring Accounts eSign Request s 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 | EMails | Versions

Preview Mode - Off

Participants 👥+

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

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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DELL

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

Click here to add participants.

eSign Console - Steve Truitt

Scheduler Monitoring Accounts eSign Requests Create Request Search 👤 Account ▾

Return to Search

Loan #:	7710031350	Lender:	**Ron Carrillo**	Status: **New** (Active)
Primary Name:	ohn Smith		DSI TEST LENDER (SALES) (100SALES)	Documents: **15** (55 total pages)
Type:	**Closing**			Signers: **3**
Package Id:	04282			Expires: **N/A** (Requires: Primary)
Worksheet #:	990 (Version			Signatures: **Y**
Closing Date:	7/30/22			

Add Participant X

Please provide the information for the new participant.

First Name: | Notary_name_placeholder |

Last Name: | |

Email: | |

Access Code: | |

Role: | Settlement Agent ▾ |

Add   Cancel

Details Documents D

Participants 👤+

#	Name/Email		Completed	Declined	Links
1	John Smith ron@docmagic.com				✉ Send Email 👁 Sign Documents
3	Andy Agent ron@docmagic.com				✉ Send Email 👁 Agent Portal

Preview Mode - Off

Action Log

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

Add Internal Note

Cancel Request   Delete Request

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DELL

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.

eSign Console/Lender Portal

Adding Participants

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

eSign Console/Lender Portal
Disable Preview Mode Toggle

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

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.

eSign Console/Lender Portal

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 Mortage	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	✔	✔	

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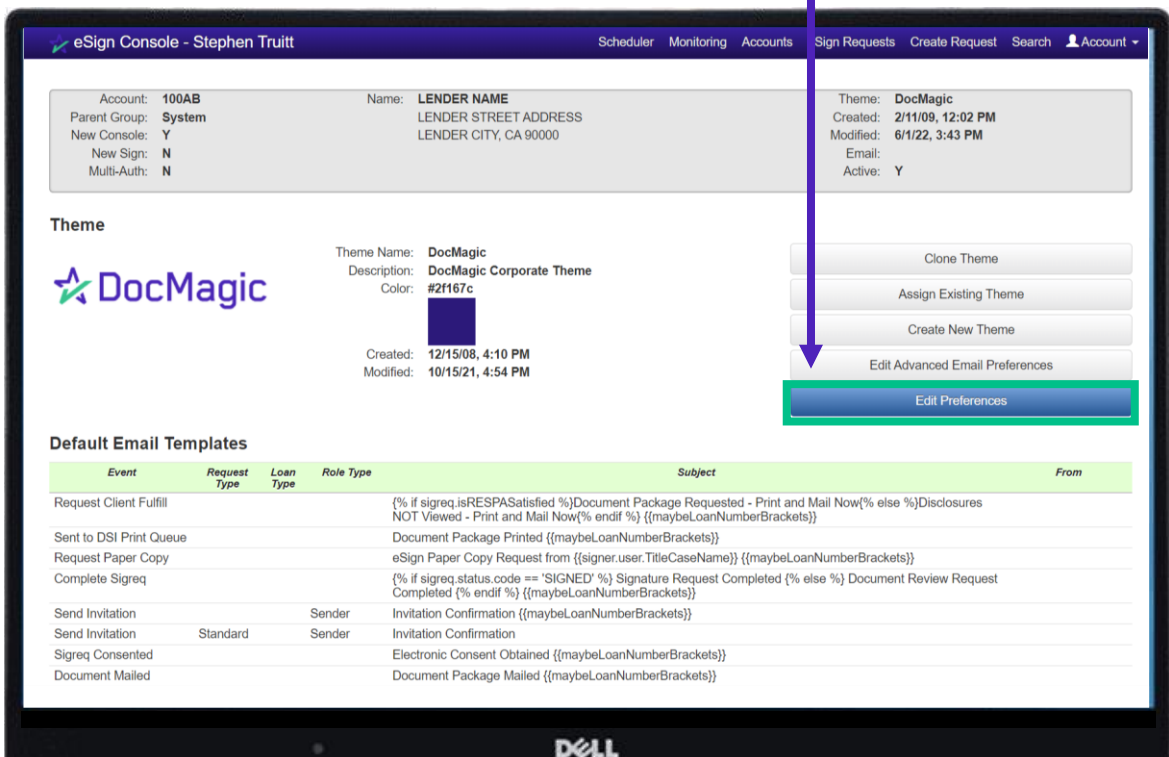
Click on an Account. The search function above allows you to filter by Account Name or Number.

eSign Console/Lender Portal

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

✦ **DocMagic**

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}}	
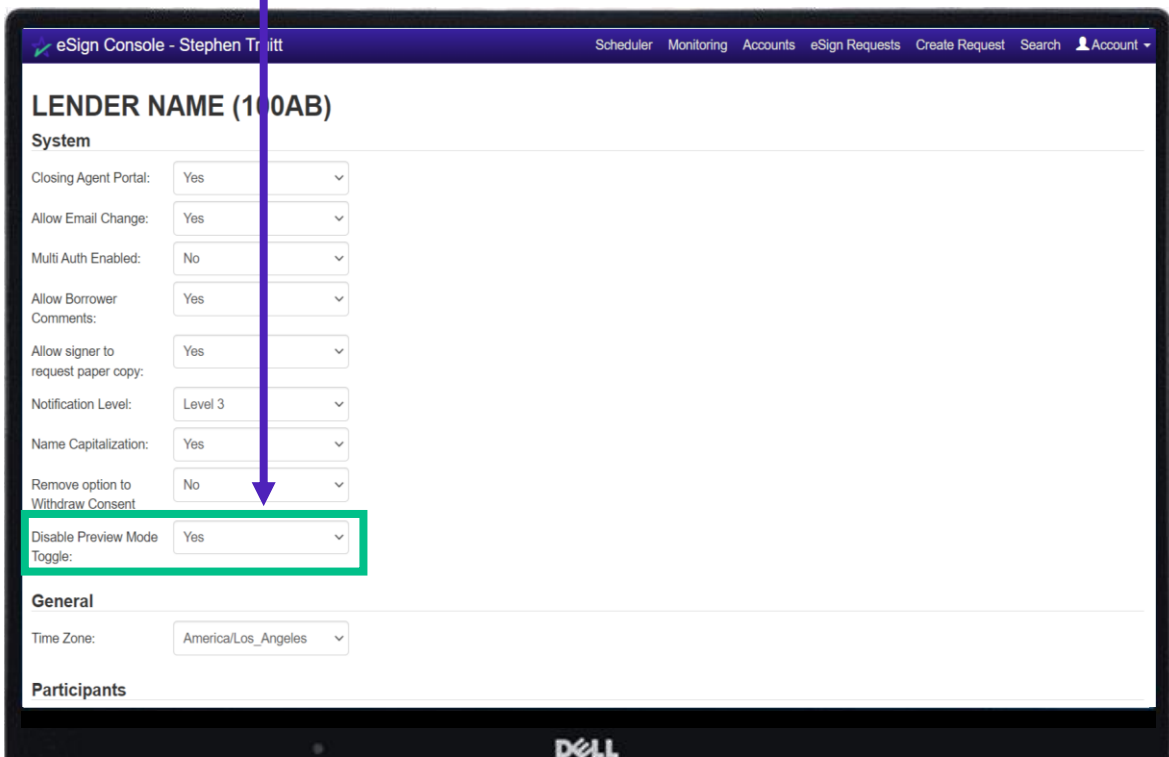
DELL

Disable Preview Mode Toggle

Set "Disable Preview Mode Toggle" to Yes.

eSign Console - Stephen Truitt

Scheduler Monitoring Accounts eSign Requests Create Request Search Account ▾

LENDER NAME (100AB)

System

Closing Agent Portal:	Yes
Allow Email Change:	Yes
Multi Auth Enabled:	No
Allow Borrower Comments:	Yes
Allow signer to request paper copy:	Yes
Notification Level:	Level 3
Name Capitalization:	Yes
Remove option to Withdraw Consent	No
Disable Preview Mode Toggle:	Yes

General

Time Zone:	America/Los_Angeles

Participants

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

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

			Lender:	Steve Truitt					Status:	New (Active)	
Loan #:	77710031350			DSI TEST LENDER (SALES) (100SALES)				Documents:	15 (55 total pages)		
Primary Name:	John Smith			struitt@docmagic.com				Signers:	2		
Type:	EClosing			(800)649-1362				Expires:	N/A (Requires: Primary)		
Package Id:	604824							Signatures:	Y (Ink Sign)		
Worksheet #:	2990 (Version : 2)										
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	nj3031.mzm.xml		Mark as Complete
4	Uniform Residential Loan Application	✔	7	1	1		5175541 | 5187042	urla.msc.xml		
5	Uniform Residential Loan Application - Lender Loan Information	✔	2	0	0	✔	5175542 | 5187043	urlalli.msc.xml		
6	Addendum to Closing Instructions	✔	1	1	1		5175543 | 5187044	atci3.msc.xml		
7	Specific Closing Instructions	✔	3	4	2		5175544 | 5187045	sci.msc.xml		
8	Hazard Insurance Authorization and Requirements	✔	2	1	1		5175545 | 5187046	hazard8.isr.xml		
9	IVES Request for Transcript of Tax Return	✔	2	2	1		5175546 | 5187047	4506c.msc.xml		
10	Closing Disclosure	✔	5	1	1		5175547 | 5187048	cd.dsc.xml		
11	Customer Identification Verification	✔	2	0	0	✔	5175548 | 5187049	civ.msc.xml		
12	Initial Escrow Account Disclosure Statement	✔	2	1	1		5175549 | 5187050	ieads.msc.xml		
13	New Jersey Initial Tax Authorization Notice	✔	1	0	0	✔	5175550 | 5187051	njitan.msc.xml		
14	New Jersey Private Well Testing Act Certification	✔	1	1	1		5175551 | 5187052	njpwt.msc.xml		
15	Signature Affidavit and AKA Statement		0/2	1	1		5175552 | 5187053	saakas.msc.xml		Mark as Complete

Add Internal Note

DELL

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

eSign Console/Lender Portal

Add a Document

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

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

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

AutoPrep complete!
Ready for your review.

appraisal.pdf
552 KB · 8 pages

✓ Assigned signatures		¶
Notary Fields		0
⚠ Requires Validation		0
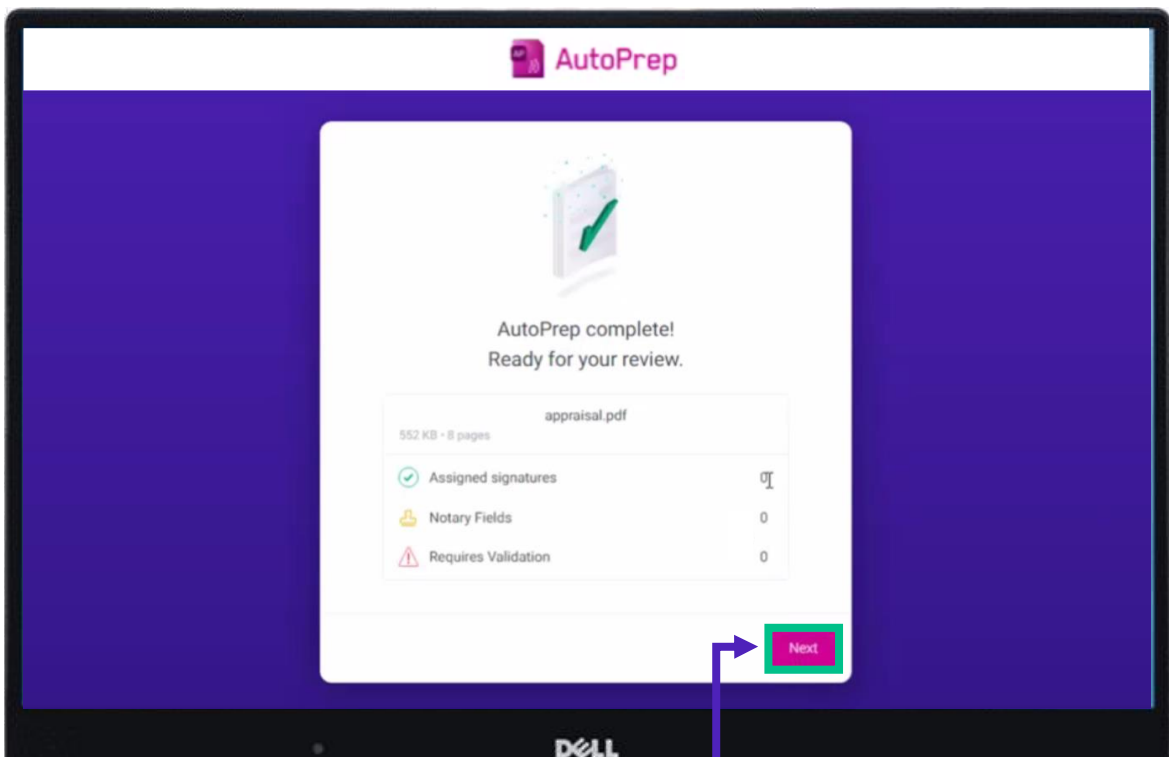
Next

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.

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.

1johnsandysmith_title docs.pdf
Prepare documents for signing.

Done

⊖ 100% ⊕

‹ T Commission Number

Assigned to

■ Notary

✓ Required

14

15

——————— [Space Below This Line For Acknowledgment] ———————

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

State of ___CALIFORNIA___)

County of _LOS ANGELES_)

On 📅 Notarization Date before me,_____
       Date   Here Insert Name and Title of the Notarizing Officer

personally appeared _John Smith AND Sandy Smith_

_____

Name(s) of Signer(s)

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

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

WITNESS my hand and official seal.

⚖ Notary Seal

T Commission Numb...

✒ Signature
Signature of Notary Public

DELL

eSign Console/Lender Portal

Refresh

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

The document that you added will appear at the bottom.

Edit Document

The pencil icon here allows you to edit a document.

The Document Editor will open in another window. Click here for the guide.

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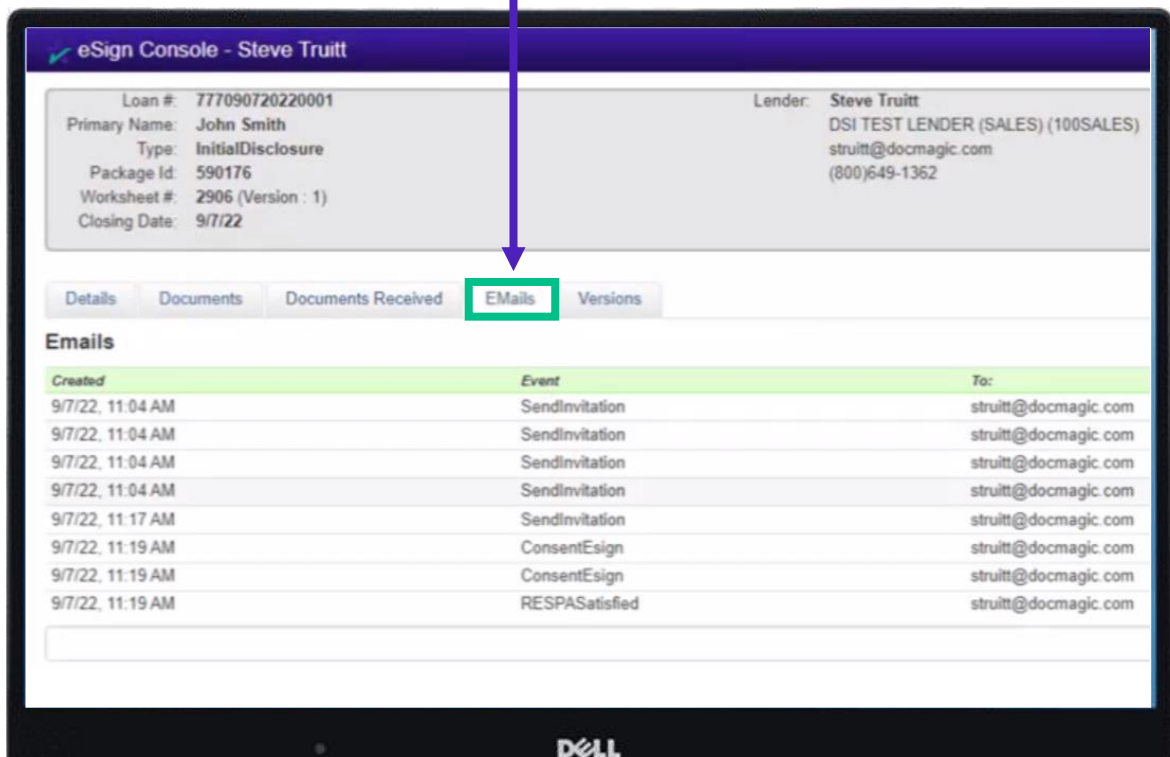
Documents Received is only for closing packages. If there are any notarized documents that the notary has uploaded back into the portal, they show up here.

eSign Console - Steve Truitt   Scheduler

Loan #:	777090720220001	Lender:	**Steve Truitt**
Primary Name:	**John Smith**		DSI TEST LENDER (SALES) (100SALES)
Type:	**InitialDisclosure**		struitt@docmagic.com
Package Id:	**590176**		(800)649-1362
Worksheet #:	**2906 (Version : 1)**		
Closing Date:	**9/7/22**		

Details   Documents   Documents Received   EMails   Versions

#	Preview	PDF	Uploaded	Document	Operation
					Add Internal Note

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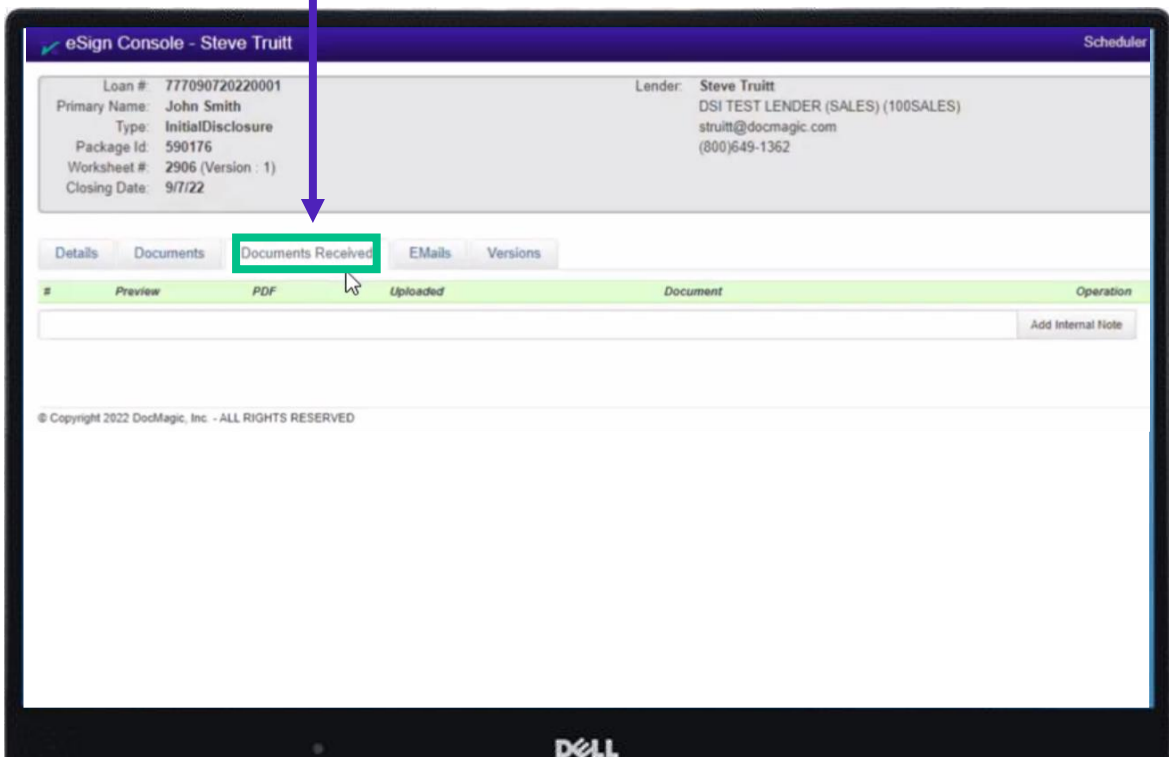
Emails contain the invitations that you've sent out already.

eSign Console - Steve Truitt

		Lender:	**Steve Truitt**
Loan #:	777090720220001		DSI TEST LENDER (SALES) (100SALES)
Primary Name:	John Smith		struitt@docmagic.com
Type:	InitialDisclosure		(800)649-1362
Package Id:	590176		
Worksheet #:	2906 (Version : 1)		
Closing Date:	9/7/22		

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
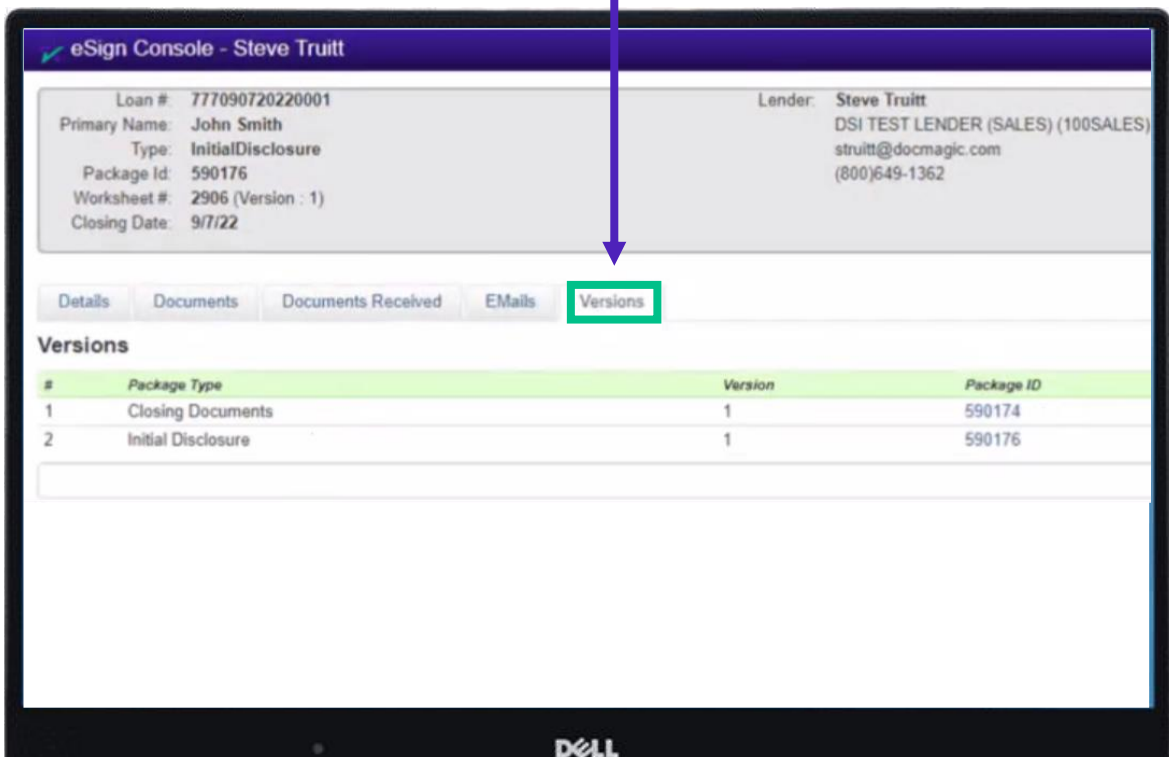
DELL

Versions

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

---

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**

Versions

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

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.

---

eSign Console - Steve Truitt

Scheduler | Monitorin | Accounts | eSign Requests | Create Request | Search | Account ▾

Return to Search

Loan #:	77710031350	Lender:	**Ron Carrillo**
Primary Name:	**John Smith**		DSI TEST LENDER (SALES) (100SAL ES)
Type:	**EClosing**		ron@docmagic.com
Package Id:	**604282**		(708)531-9060
Worksheet #:	**2990** (Version : 1)		
Closing Date:	**9/30/22**		

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

Details | Documents | Documents Received | EMails | Versions

Participants 👤

Preview Mode - Off

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

Action Log

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

Add Internal Note

Cancel Request | Delete Request

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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.

eSign Console/Lender Portal

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.

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.

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 Action Log documents all the changes that occur.

eSign Console/Lender Portal

Icons

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

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

The printer opens your printing options.

You can view the DocMagic eSign certificate by clicking here.

Certificate

The certificate mentioned previously downloads or opens as a PDF.

✫ DocMagic — 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	John Smith	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 11:17:27 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	STEVE 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: 5103843 ()

DELL

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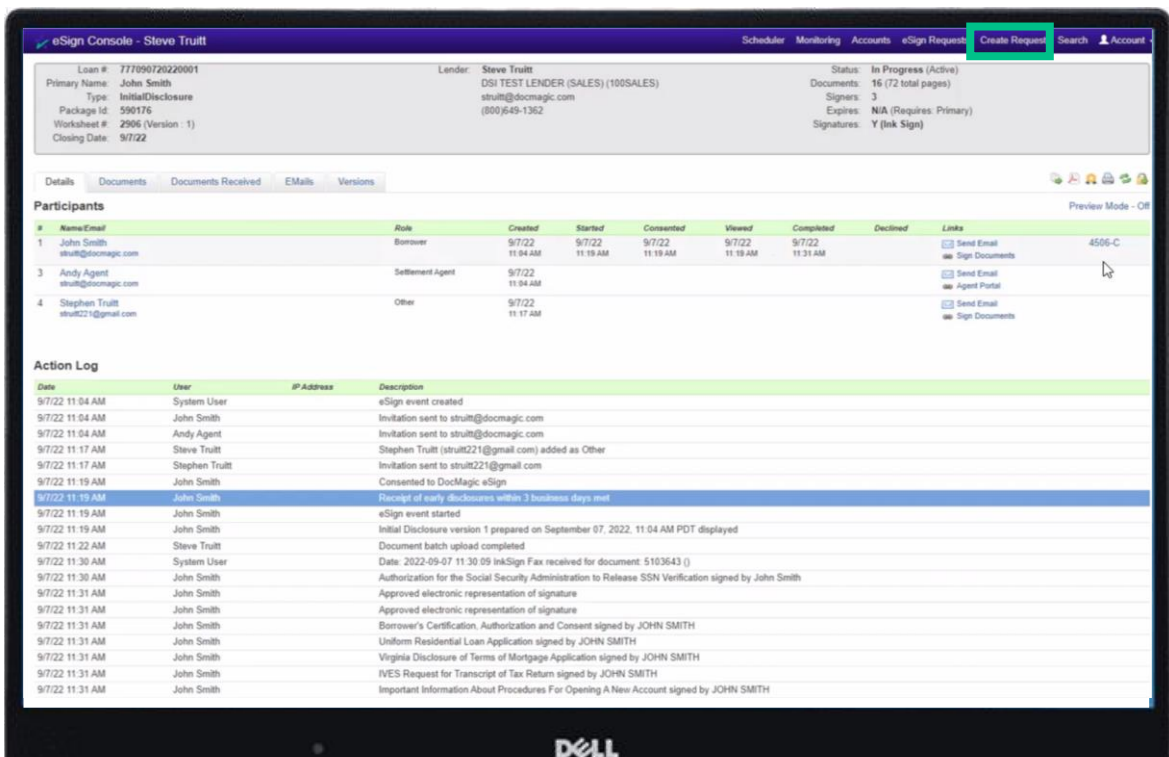

We recommend that you save the document sets after all signatures are collected, as you will only have a loan document set in the portal for 90 days.

Create Request

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

Click on the Bonus Material section on the Lender's Product Training Page for details.