

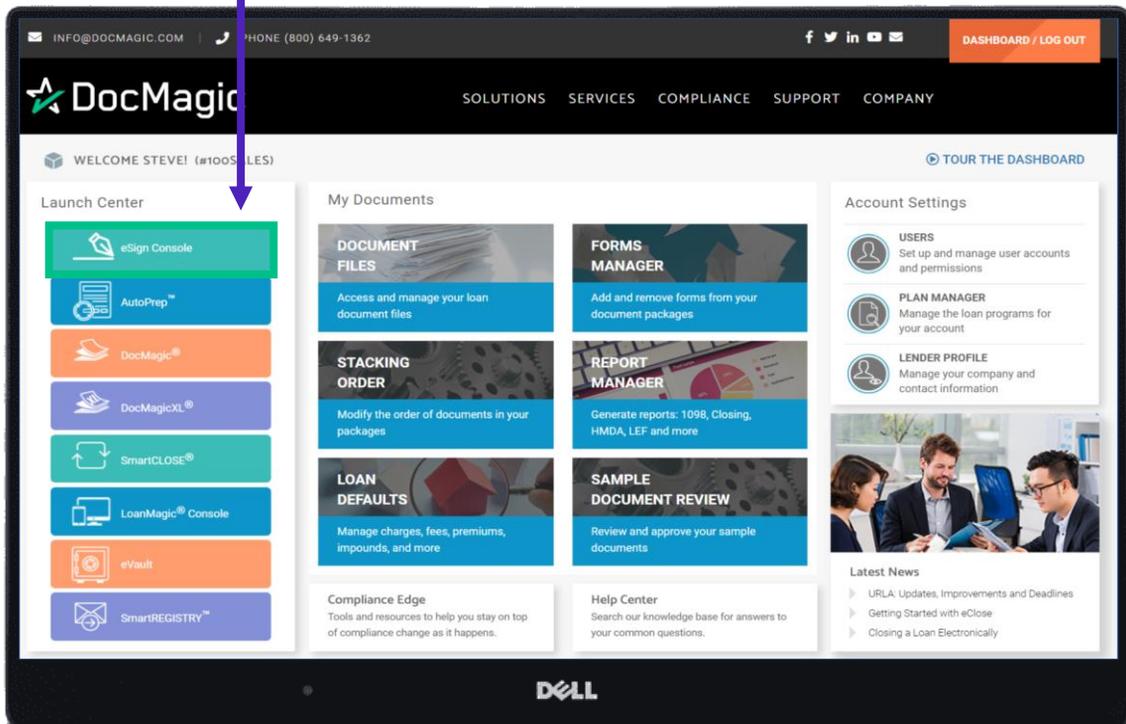


eSign Console  
Lender Portal

# eSign Console/Lender Portal

## Getting Started

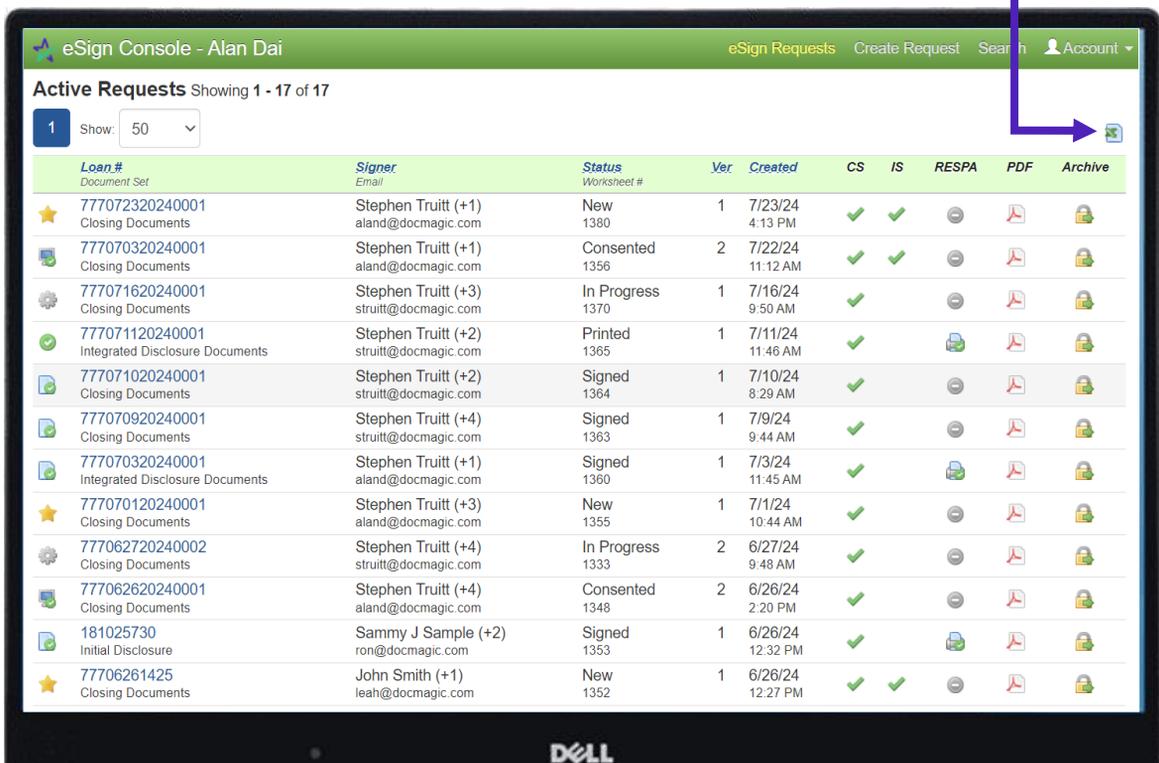
Login to DocMagic and open the eSign Console from the Launch Center.



# 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.



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.



# 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.

The screenshot shows the eSign Console interface for Steve Truitt. The top navigation bar includes 'Scheduler', 'Monitoring', 'Accounts', 'eSign Requests', 'Create Request', 'Search', and 'Account'. The 'Account' dropdown menu is open, showing options: 'Dashboard', '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 15 requests. The table has columns for Loan #, Signer, Status, Ver., Created, CS, IS, and RES. The requests are listed in descending order of creation date, from 9/29/22 1:50 PM to 9/29/22 9:45 AM.

Loan # Document Set	Signer Email	Status Worksheet #	Ver.	Created	CS	IS	RES
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	✓		
77709291143 Closing Documents	John Smith (+5) roland@docmagic.com	In Progress 2977	1	9/29/22 9:46 AM	✓		
777092920220004 Closing Documents	John Smith (+2) aland@docmagic.com	Signed 2978	1	9/29/22 9:45 AM	✓		



# 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).

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					

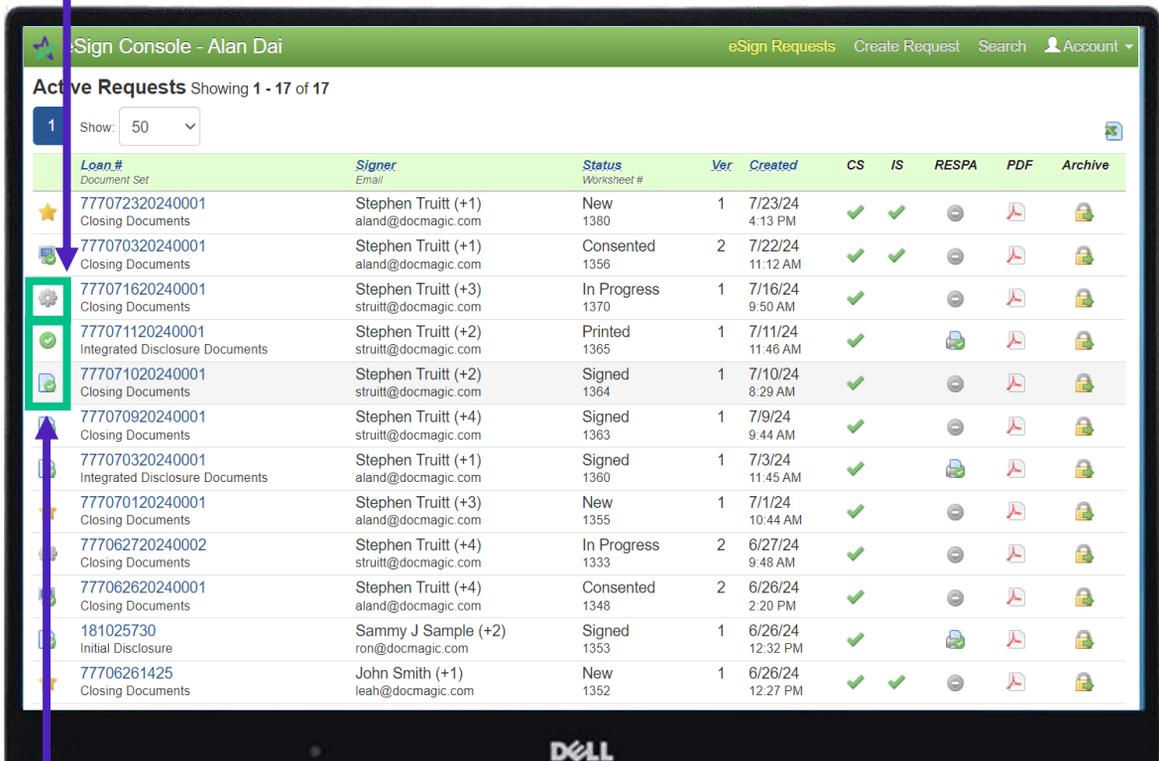
The computer monitor with the check mark indicates that the participant(s) have consented to the use of electronic signatures and eSign.



# 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.



The screenshot shows the eSign Console interface for Alan Dai. The table displays 17 active requests. The status icons in the 'Document Set' column are highlighted with a green box and a blue arrow pointing to the text above. The icons include a star, a gear, a checkmark on a piece of paper, a full checkmark, and a document icon.

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 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*.



# eSign Console/Lender Portal

## 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 top navigation bar includes links for Scheduler, Monitoring, Accounts, eSign Requests, Create Request, Search, and Account. The main content area is a table with columns for Loan.#, Signer, Status, Ver, Created, CS, IS, RESPA, PDF, and Archive. The first row is highlighted with a green box around the loan number 777100320220001, and a callout box points to it with the text 'Click on the loan number to see details about that document set.'

Loan.#	Signer	Status	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	✓	⊖	⊖	📄	🔒



# eSign Console/Lender Portal

## 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 interface for a user named Steve Truitt. The top navigation bar includes links for Scheduler, Monitoring, Accounts, eSign Requests, Create Request, Search, and Account. A 'Return to Search' link is also present in the top right.

The main content area is divided into three columns of loan details:

- 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 details are tabs for Details, Documents, Documents Received, EMail, and Versions. There are also icons for document actions.

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						<a href="#">Send Email</a> <a href="#">Sign Documents</a>
3	Andy Agent ron@docmagic.com	Settlement Agent	10/3/22 1:54 PM						<a href="#">Send Email</a> <a href="#">Agent Portal</a>

The **Action Log** section shows a table with the following data:

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 interface, there is an 'Add Internal Note' button, 'Cancel Request' and 'Delete Request' buttons, and a footer with copyright information and links for Home, Contact, Privacy Policy, and Terms of Use.



# 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.

The screenshot displays the eSign Console interface for a user named Steve Truitt. The interface includes a navigation bar with options like Scheduler, Monitoring, Accounts, eSign Requests, Create Request, Search, and Account. The main content area shows loan details for Loan # 77710031350, Primary Name John Smith, and Lender Ron Carrillo. A red box highlights the Worksheet #: 2990 (Version: 1). Below this, there are tabs for Details, Documents, Documents Received, EMail, and Versions. 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 table with columns for Date, User, IP Address, and Description. At the bottom, there are buttons for Add Internal Note, Cancel Request, and Delete Request.

Loan #: 77710031350  
Primary Name: John Smith  
Type: EClosing  
Package Id: 604282  
Worksheet #: 2990 (Version: 1)  
Closing Date: 10/3/22

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

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

© Copyright 2022 DocMagic, Inc. - ALL RIGHTS RESERVED

Home Contact Privacy Policy Terms of Use



# eSign Console/Lender Portal

## 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 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 two sections: 'Participants' and 'Action Log'.

**Participants Section:**

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

**Action Log Section:**

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

The interface also includes a 'Details' tab, a 'Participants' tab with a plus icon, and an 'Action Log' tab. The 'Participants' and 'Action Log' tabs are highlighted with green boxes and arrows pointing to the text above and below the screenshot, respectively.

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



# eSign Console/Lender Portal

## 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 loan summary shows: Loan #: 77710031350, Lender: Ron Carrillo, Status: New (Active), Documents: 15 (55 total pages), Signers: 3, Expires: N/A (Requires: Primary), and Signatures: Y. The 'Participants' table lists two participants: John Smith (Borrower) and Andy Agent (Settlement Agent). The 'Links' column for John Smith contains 'Send Email' and 'Sign Documents'. The 'Action Log' table shows three entries: 'eSign event created', 'Invitation sent to ron@docmagic.com', and 'Invitation sent to ron@docmagic.com'. A blue arrow points from the 'Send Email' link in the 'Links' column to the 'Send Email' button in the 'Action Log' section.

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

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

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.



# eSign Console/Lender Portal

## 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 loan summary shows: Loan #: 77710031350, Lender: Ron Carrillo (DSI TEST LENDER (SALES) (100SALES)), Status: New (Active), Documents: 15 (55 total pages), Signers: 3, Expires: N/A (Requires: Primary), Signatures: Y. The 'Participants' table lists John Smith (Borrower) and Andy Agent (Settlement Agent). The 'Links' column for Andy Agent has a red box around the 'Agent Portal' link. The 'Action Log' shows events for 10/3/22 1:54 PM.

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

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



# eSign Console/Lender Portal

## Adding Participants

Click here to add participants.

The screenshot displays the eSign Console interface for user Steve Truitt. The main header includes navigation links: Scheduler, Monitoring, Accounts, eSign Requests, Create Request, Search, and Account. The main content area shows loan details for Loan # 7710031350, Lender Ron Carrillo (DSI TEST LENDER (SALES) (100SALES)), and Status New (Active). A modal window titled "Add Participant" is open, prompting the user to provide information for a new participant. The modal contains the following fields: First Name (Notary\_name\_placeholder), Last Name, Email, Access Code, and Role (Settlement Agent). The "Add" button is highlighted with a green box. Below the modal, the "Participants" table lists existing participants: John Smith (ron@docmagic.com) and Andy Agent (ron@docmagic.com). The "Action Log" section shows a history of events, including "eSign event created" and "Invitation sent to ron@docmagic.com".

#	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.



# 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.

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 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, EMail, and Versions. The 'Participants' section lists three participants: John Smith (Borrower), Andy Agent (Settlement Agent), and a Notary placeholder. The Notary row has a red box around the 'Sign Documents' link. The 'Action Log' section shows a log of events, including the creation of the eSign event and invitation emails sent to John Smith and Andy Agent. At the bottom, there are buttons for 'Add Internal Note', 'Cancel Request', and 'Delete Request', along with a footer containing copyright information and links for Home, Contact, Privacy Policy, and Terms of Use.

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

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



# 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.

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 is an 'Add Internal Note' button, 'Cancel Request' and 'Delete Request' buttons, and a footer with '© 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.



# eSign Console/Lender Portal

## Disable Preview Mode Toggle

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

The screenshot shows the eSign Console interface. The top navigation bar includes 'Scheduler', 'Monitoring', 'Accounts', 'eSign Requests', 'Create Request', 'Search', and 'Account'. The 'Accounts' menu item is highlighted. Below the navigation bar is a search form with fields for 'Account Name' and 'Account Number', and a 'Search' button. A table of accounts is displayed below the search form, with columns for Account Number, Account Name, Group Id, Theme, Active, Use New Console, and Use New Sign.

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.



# 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**

 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



# eSign Console/Lender Portal

## Disable Preview Mode Toggle

Set "Disable Preview Mode Toggle" to Yes.

eSign Console - Stephen Tr... 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**

DELL

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



# eSign Console/Lender Portal

## 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 #: 77710031350 Lender: Steve Truitt Status: New (Active)  
Primary Name: John Smith DSI TEST LENDER (SALES) (100SALES) Documents: 15 (55 total pages)  
Type: EClosing struitt@docmagic.com Signers: 2  
Package Id: 604824 (800)649-1362 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	njtan.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.

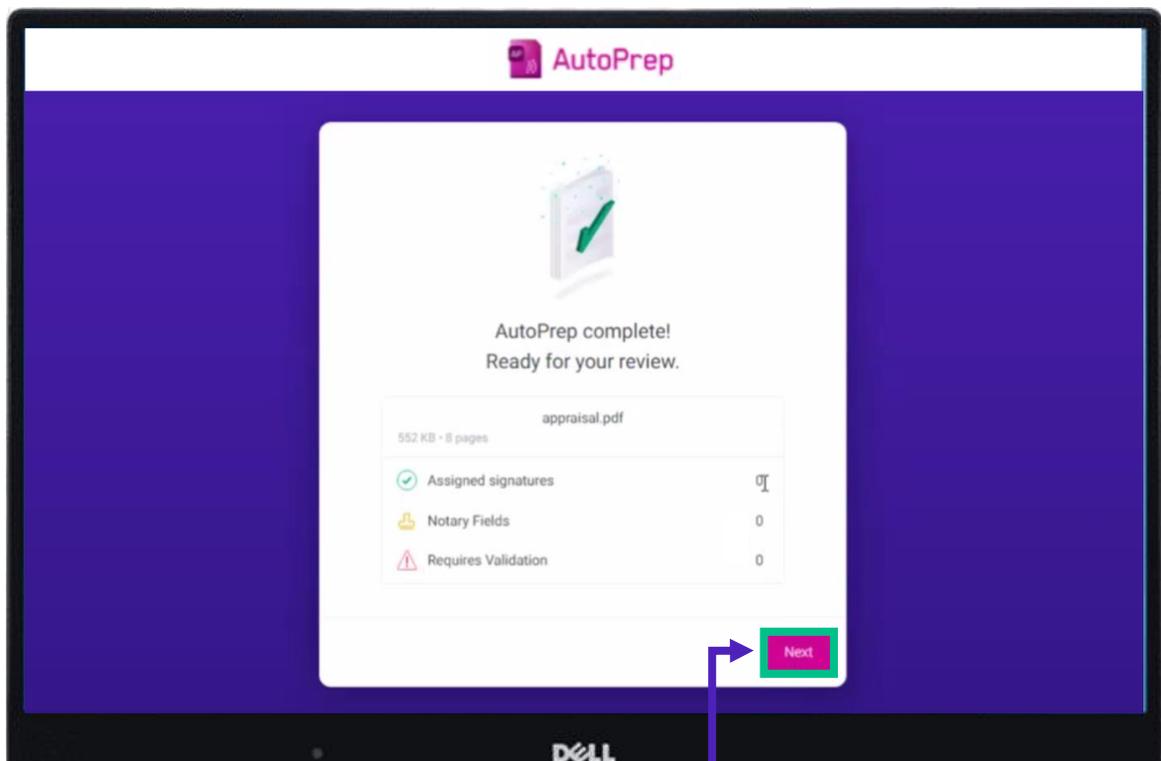




# eSign Console/Lender Portal

## 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.



# eSign Console/Lender Portal

## 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 the Document Editor interface for a PDF document titled "1Johnsandysmith\_title docs.pdf". The document is 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"
- Text: "State of CALIFORNIA )"
- Text: "County of LOS ANGELES )"
- Text: "On Notarization Date before me, \_\_\_\_\_"
- Text: "Date Here Insert Name and Title of the Notarizing Officer"
- Text: "personally appeared John Smith AND Sandy Smith"
- Text: "Name(s) of Signer(s)"
- Text: "who proved to me on the basis of satisfactory evidence to be the person(s) whose name(s) is/are subscribed to it 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."
- Text: "I certify under PENALTY OF PERJURY under the laws of the State of California that the foregoing paragraph is true and correct."
- Text: "WITNESS my hand and official seal."
- Text: "Notary Seal" (with a seal icon)
- Text: "Commission Numb..." (with a text input field)
- Text: "Signature" (with a signature icon)
- Text: "Signature of Notary Public"
- Text: "Assigned to" (with a dropdown menu showing "Notary" and a lock icon)
- Text: "Required" (with a checked checkbox)
- Text: "Commission Number" (with a text input field)
- Text: "Done" (highlighted in a red box in the top right corner)



# eSign Console/Lender Portal

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, 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, Status In Progress, Documents 16 (7), Signers 3, Expires N/A, and Signatures Y (In Progress).

The 'Documents' tab is selected, showing a table of documents. The table has columns for Document Name, ClickSign, Page(s), Mark(s), Signer(s), Completed, and Sigreq Document Id | Document. The document 'appraisal' is highlighted at the bottom of the list.

Document Name	ClickSign	Page(s)	Mark(s)	Signer(s)	Completed	Sigreq Document Id   Document
1 Borrower's Certification, Authorization and Consent	✓	2	1	1		5092137   5103630
2 Uniform Residential Loan Application	✓	7	1	1		5092130   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		5092206   5103767

The document that you added will appear at the bottom.



# eSign Console/Lender Portal

## Edit Document

The pencil icon here allows you to edit a document.

The screenshot displays the eSign Console interface. On the left, a sidebar shows a list of documents under the heading "Documents". A pencil icon is highlighted in a green box, with a blue arrow pointing to a text box above. The main area shows a document editor for "Borrower's Certification, Authorization and Consent". The editor displays the document content, including a section titled "BORROWER CONSENT TO THE USE OF TAX RETURN INFORMATION". Below the document content, there is a signature line with the name "JOHN SMITH" and a date field. On the right side of the editor, there is a "Signature & Initials" panel with options for "Signature", "Initials", and "PostFill". Below this panel, there are various form elements like "Textbox", "Phone Number", "Date", "Checkbox", and "Radio". At the bottom of the document list, there is a table with columns for document name, status, and other details.

Document Name	Status	Count	Count	Count	Document ID	File Name	Actions
1 Borrower's Certification, Auth							
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 Verificat							
12 Initial Escrow Account Disclosure Statement	✓	2	1	1	5175549   5187050	ivads.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

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



# eSign Console/Lender Portal

## 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 interface for Steve Truitt. The top navigation bar includes 'eSign Console - Steve Truitt' and a 'Scheduler' link. The main content area is divided into two sections: a header with loan details and a tabbed interface below.

**Loan Details:**

- 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

**Navigation Tabs:** Details, Documents, Documents Received (highlighted), EMail, Versions

**Table Headers:** #, Preview, PDF, Uploaded, Document, Operation

**Footer:** © Copyright 2022 DocMagic, Inc. - ALL RIGHTS RESERVED



# eSign Console/Lender Portal

## 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



# eSign Console/Lender Portal

## 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



# eSign Console/Lender Portal

## 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. A green box highlights the 'Created' and 'Started' columns, which both show the timestamp '10/3/22 1:54 PM' for all participants.
- 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.

The interface also includes tabs for 'Details', 'Documents', 'Documents Received', 'Emails', and 'Versions', and a 'Preview Mode - Off' indicator.

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.

The screenshot displays the DocMagic eSign Console interface. At the top, the DocMagic logo is on the left, and navigation options 'Review', 'Sign', and 'Completed' are in the center. On the right, the user is identified as 'JOHN SMITH Customer'. Below the navigation, a 'Please review your documents.' message is followed by the document title 'Borrower's Certification, Authorization and Consent' and a 'Start signing' button. The main content area shows the document text, including a section titled 'BORROWER CONSENT TO THE USE OF TAX RETURN INFORMATION'. The text states: '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'. It also defines 'The Lender' and 'The Other Loan Participants'. At the bottom, there are signature lines for 'Borrower JOHN SMITH' and 'Borrower', each with a 'Date' field. 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](#).



# eSign Console/Lender Portal

## 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', 'Search', and 'Account'. The main content area is divided into several sections:

- Loan Details:** Loan # 777890720220001, Lender: Steve Truitt, Status: In Progress (Active), Documents: 16 (72 total pages), Signers: 3, Expires: N/A (Requires: Primary), Signatures: Y (Ink Sign).
- Participants Table:** A table with columns: #, Name/Email, Role, Created, Started, Consented, Viewed, Completed, Declined, Links, and Preview Mode - Off. The 'Created' through 'Completed' columns for the borrower (John Smith) are highlighted with a green box.
- Action Log Table:** A table with columns: Date, User, IP Address, and Description. The first row is highlighted with a blue box.

#	Name/Email	Role	Created	Started	Consented	Viewed	Completed	Declined	Links	Preview Mode - Off
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 11:02 AM	Steve Truitt		Document batch upload completed
9/7/22 11:00 AM	System User		Date: 2022-09-07 11:30:05 InkSign Fax received for document: 5103643 ()
9/7/22 11:00 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.



# 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.

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 shows 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 in the top right corner of the main content area contains several icons: a green arrow pointing right, a red document icon, a yellow award icon, a blue printer icon, a green circular refresh icon, and a yellow 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.



# eSign Console/Lender Portal

## Icons

The printer opens your printing options.

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 loan summary shows Loan # 777890720220001, Lender Steve Truitt, and Status In Progress (Active). The Participants table lists four individuals: John Smith (Borrower), Andy Agent (Settlement Agent), and Stephen Truitt (Other). The Action Log table provides a detailed history of events, including document uploads and signatures.

Name/Email	Role	Created	Started	Consented	Viewed	Completed
1 John Smith stt@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 stt@docmagic.com	Settlement Agent	9/7/22 11:04 AM				
4 Stephen Truitt stt@docmagic.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 stt@docmagic.com
9/7/22 11:04 AM	Andy Agent		Invitation sent to stt@docmagic.com
9/7/22 11:17 AM	Steve Truitt		Stephen Truitt (stt221@gmail.com) added as Other
9/7/22 11:17 AM	Stephen Truitt		Invitation sent to stt221@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.



# eSign Console/Lender Portal

## Certificate

The certificate mentioned previously downloads or opens as a PDF.

**DocMagic eSign Certificate**

eSign Id:	500176	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 strutt@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 strutt@docmagic.com		09/07/22 11:04:28 AM				
STEPHEN TRUITT strutt221@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 strutt@docmagic.com
09/07/22 11:04:28 AM	ANDY AGENT	10.1.138.24	Invitation sent to strutt@docmagic.com
09/07/22 11:17:26 AM	STEPHEN TRUITT	10.1.10.201	Stephen Trutt (strutt221@gmail.com) added as Other
09/07/22 11:17:26 AM	STEPHEN TRUITT	10.1.10.201	Invitation sent to strutt221@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 ( )



# eSign Console/Lender Portal

## Icons

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

The screenshot displays the eSign Console interface for a loan with ID 777890720220001. The loan is currently 'In Progress (Active)' with 16 documents (72 total pages) and 3 signers. The participants table lists John Smith (Borrower), Andy Agent (Settlement Agent), and Stephen Truitt (Other). The action log shows a series of events from 9/7/22 11:04 AM to 11:31 AM, including document creation, invitation sending, consent, and document signing.

#	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				

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.



# 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 displays 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 shown, including Loan # 777890720220001, Lender Steve Truitt, and Status In Progress (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 9/7/22 11:04 AM to 11:31 AM, including document uploads, signatures, and consent actions.

#	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.

