



AutoPrep™

The Complete Guide

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AutoPrep™ is DocMagic's proprietary software that automatically tags documents.

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- ✓ Create an eNote, then tag with AutoPrep

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- ✓ Initiate an eClose transaction from AutoPrep™
- ✓ No eNote Creation

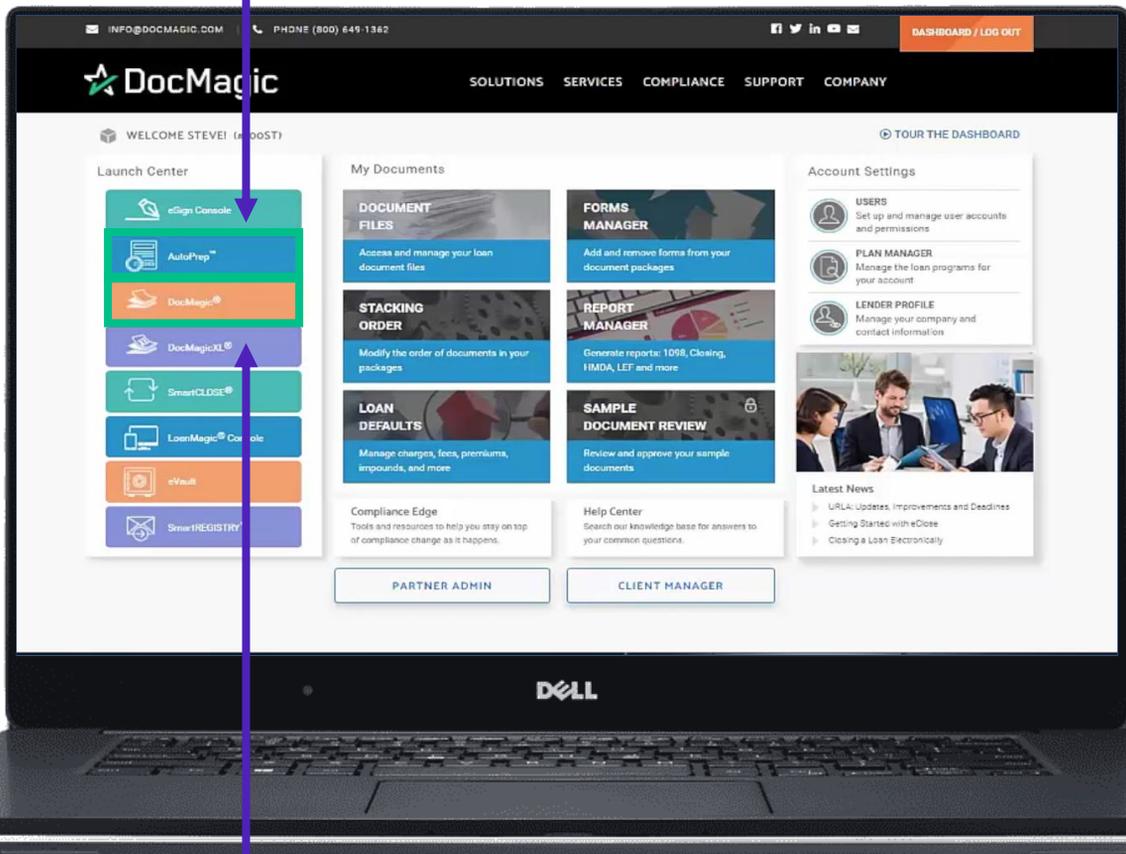
Using AutoPrep™ from the Settlement Agent Portal Page 27

- ✓ Ensure proper e-tagging of documents

Determine which of these use cases suits you best and skip to that portion of the guide. Happy tagging!



Start by going to the DocMagic dashboard. If you do not need to generate an eNote, click on the AutoPrep™ icon and skip to page 7 of this guide.



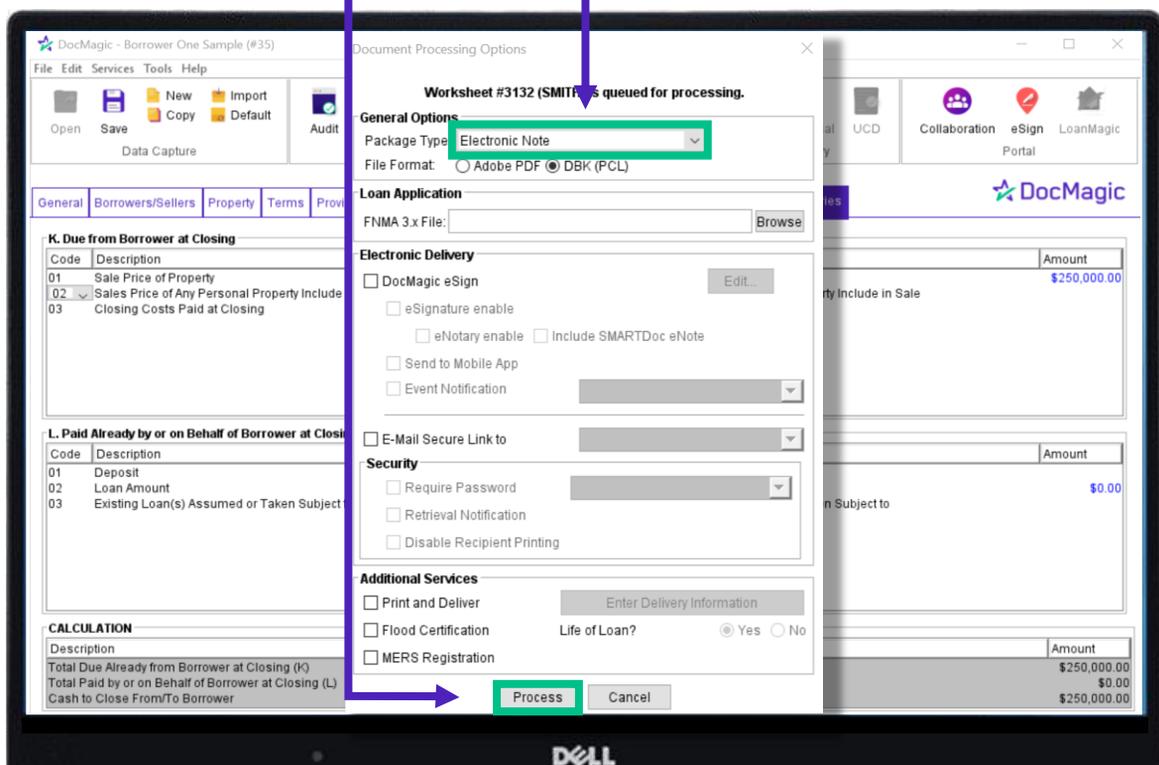
If you need to generate an eNote, click on DocMagic to launch DocMagic Online.



AutoPrep™ - DocMagic Online

Draw The Rest of the Owl

Process the eNote from your loan file. Select Electronic Note under Package Type and click Process.



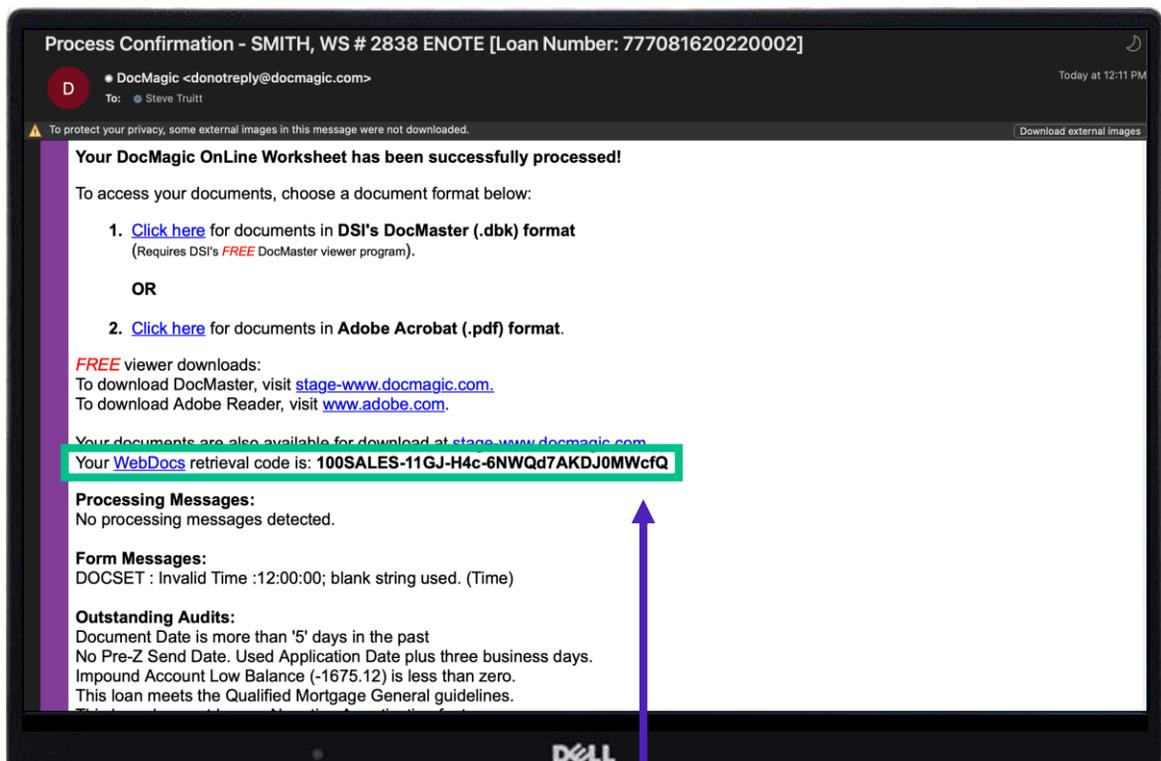
Not sure how we got here? Please check out our [DocMagic Online training section of the Product Training page](#).



AutoPrep™ - DocMagic Online

Grab The WebDocs Code

When you process the eNote, you will receive this confirmation email.



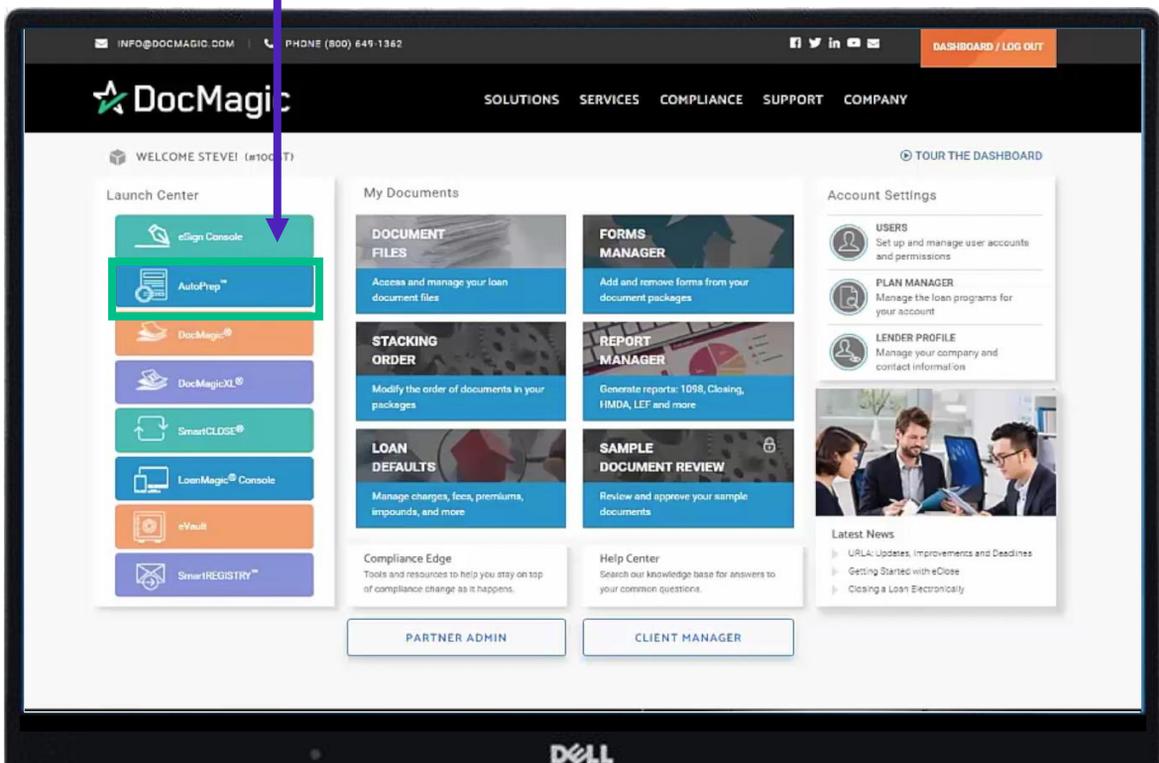
Copy this WebDocs retrieval code. You will need it when you upload documents to AutoPrep™.



AutoPrep™ - DocMagic Online

Start AutoPrep™

Go to the dashboard and choose AutoPrep™ from the Launch Center.



Once the page loads, you'll be greeted with this screen. Start by entering the Loan Number.

Transaction Details

Loan Number
7770128202300001

Include eNote? Yes No

eNotary Enable? Yes No

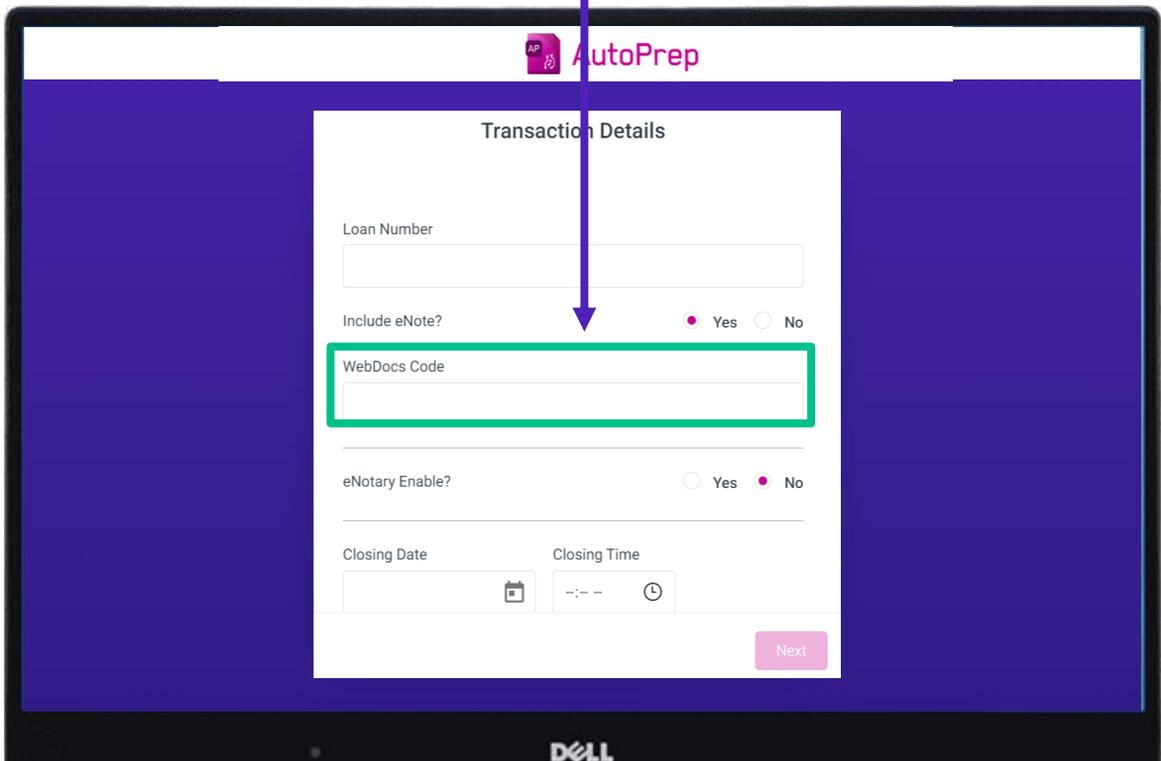
Closing Date Closing Time

Next

Select the radio button to indicate whether you will include an eNote or not.



If you select Yes for Include eNote, a field will appear below where you can enter in your WebDocs Code.



The screenshot shows the 'Transaction Details' form on a Dell monitor. The form includes the following fields and options:

- Loan Number: [Text Input Field]
- Include eNote?: Yes No
- WebDocs Code: [Text Input Field, highlighted with a green border]
- eNotary Enable?: Yes No
- Closing Date: [Calendar Icon]
- Closing Time: [Time Selection Icon]
- Next: [Next Button]

If you are not using an eNote, ignore this page.



Regardless of whether you include an eNote, you will still need to select whether eNotary is enabled and enter a closing date and time.

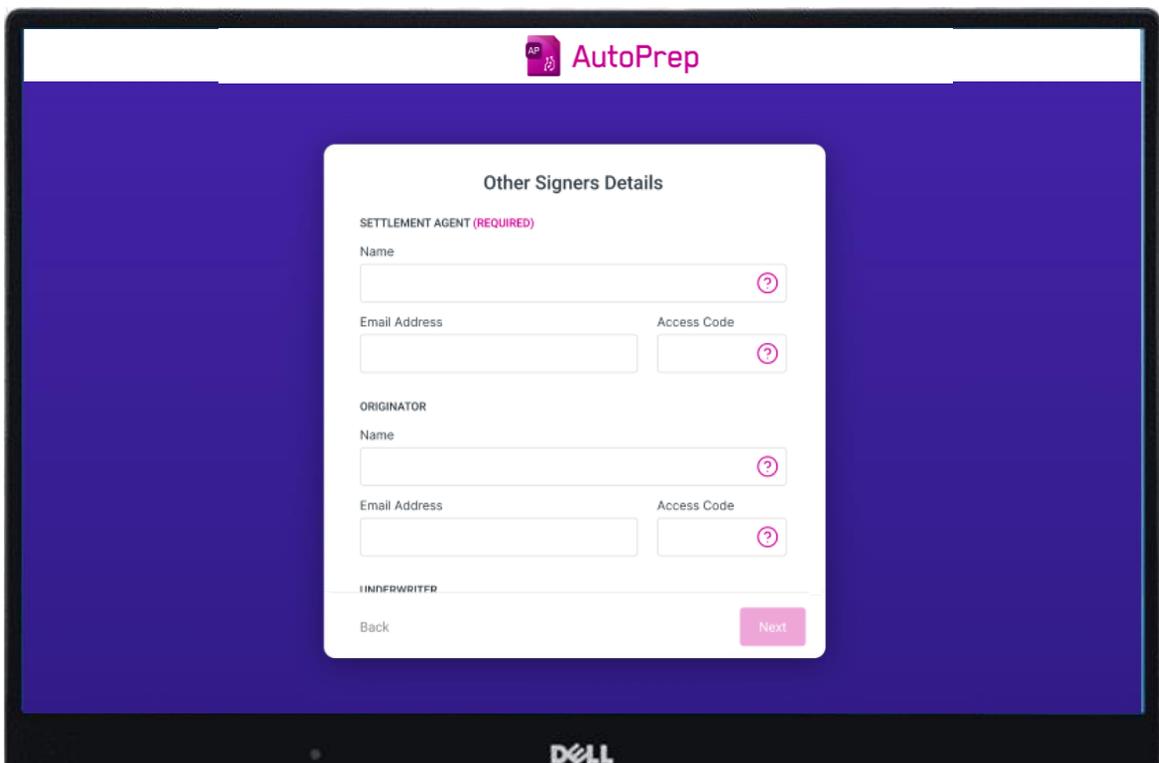
The screenshot shows the 'Transaction Details' form on a Dell monitor. The form is titled 'Transaction Details' and contains the following fields:

- Loan Number: 7770128202300001
- Include eNote?: Yes No
- eNotary Enable?: Yes No
- Closing Date: 1/19/2023
- Closing Time: 09:00 AM
- Next button

Once you enter enough information, the Next button will no longer be greyed out. Click it to continue.



Enter information for buyer, seller, settlement agent, originator, underwriter, and notary.



The screenshot shows a Dell monitor displaying the AutoPrep web application. The page title is "Other Signers Details". It features three sections for data entry:

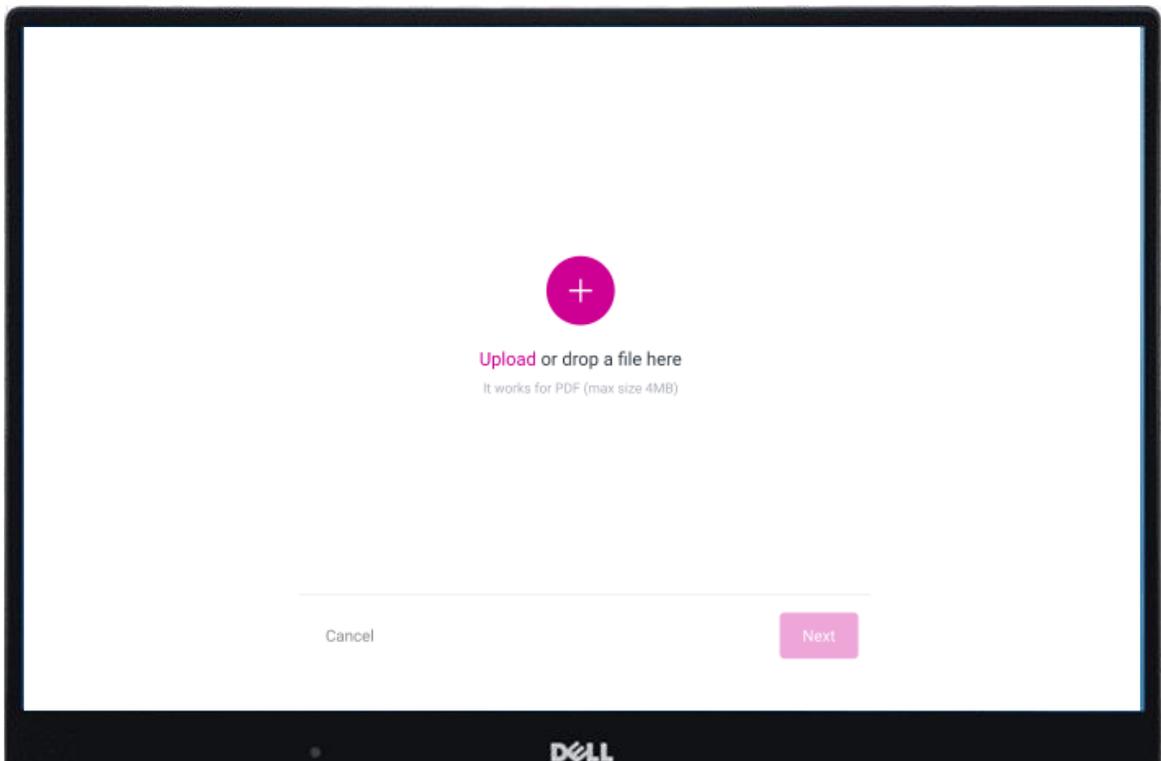
- SETTLEMENT AGENT (REQUIRED)**: Includes a "Name" field with a help icon, and "Email Address" and "Access Code" fields.
- ORIGINATOR**: Includes a "Name" field with a help icon, and "Email Address" and "Access Code" fields.
- UNDERWRITER**: This section is currently empty.

At the bottom of the form, there are "Back" and "Next" buttons. The Dell logo is visible at the bottom center of the monitor frame.

Borrower information needs to be entered EXACTLY as it appears in the document.



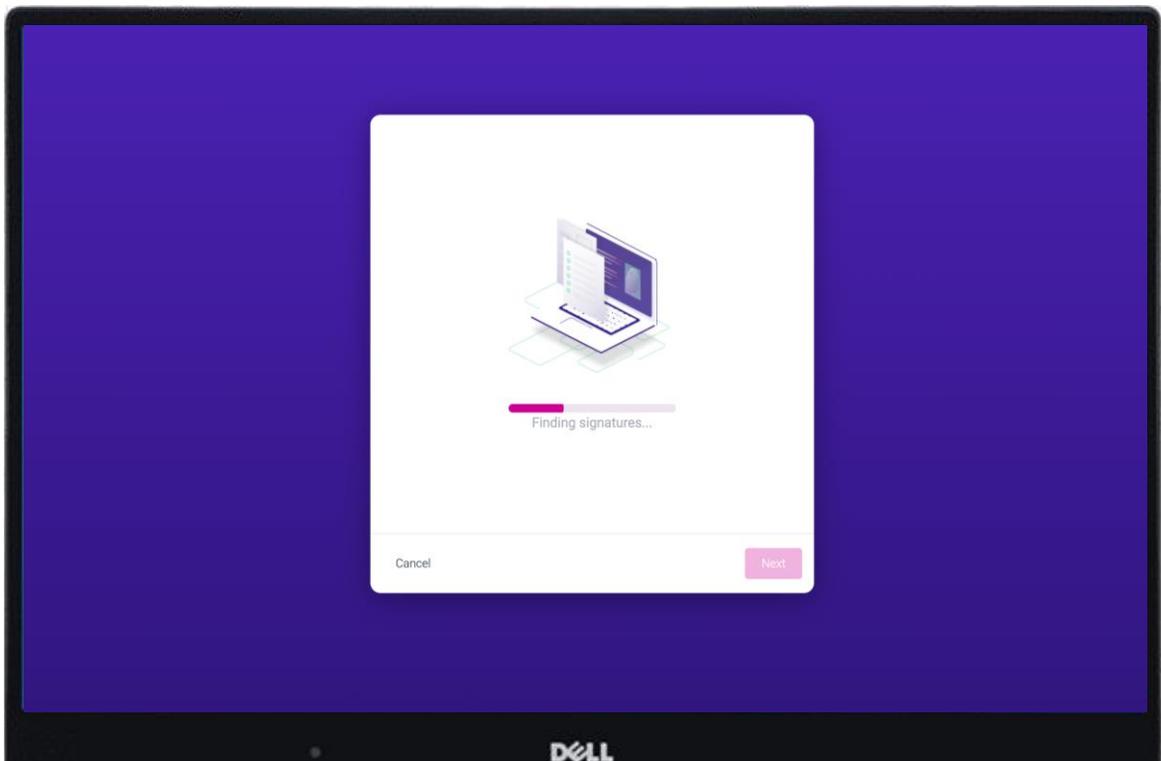
Upload a PDF that you wish to prepare.



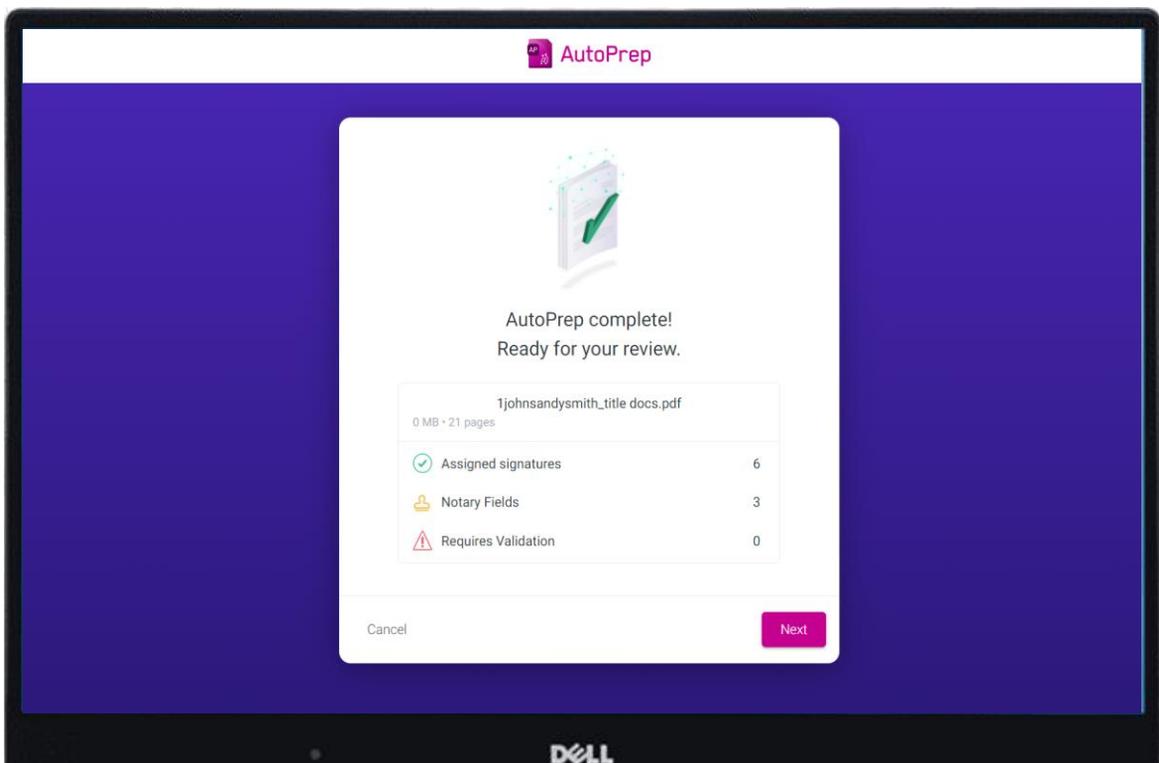
AutoPrep™

AutoPrep™ = (Doc)MAGIC

AutoPrep™ will use Optical Character Recognition (OCR) and A.I. to identify signatures lines for Borrowers and other participants including Notaries.



This screen will confirm the number of signatures, notary fields, and unassigned signatures found.



Green = Identified Field

Green means that the field has been identified to match a previously entered participant.

Please review the documents below

1johnsandysmith_title docs.pdf
page 1 of 21

Done

Loan Number: LOANNUMBER

EVIDENCE OF JOINT APPLICATION

Date: APRIL 5, 2016
Provided By: White House Bank
Borrower: John Smith, Sandy Smith
Property Address: 1234 MAIN STREET, TORRANCE, CALIFORNIA 90501

If you are applying for joint credit with another person, please sign below.

We intend to apply for joint credit.



If electronic notarization is applicable, you may see an **orange** icon indicating that an item has been identified as a Notary field.

The screenshot displays a document titled "1johnsandysmith_title docs.pdf" (page 1 of 21) with the heading "EVIDENCE OF JOINT APPLICATION". The document content includes:

- Loan Number: LOANNUMBER
- Date: APRIL 5, 2016
- Provided By: White House Bank
- Borrower: John Smith, Sandy Smith
- Property Address: 1234 MAIN STREET, TORRANCE, CALIFORNIA 90501

Below the address, there is a section for joint credit application with the text: "If you are applying for joint credit with another person, please sign below. We intend to apply for joint credit." This section contains three signature fields:

- A green field for "JOHN SMITH (Borrower 1)" with a green pencil icon.
- A blue field for "Borrower John Smith" with a blue pencil icon.
- A red field for "Notary" with a red pencil icon.

Each field has a "Date" label and a close button (X). A fourth field labeled "Select signer" is highlighted with a red border and a red pencil icon. On the right side of the document, there is a vertical toolbar with three icons: a green checkmark, an orange warning triangle, and a red warning triangle. A blue arrow points from the text box above to the orange warning icon, and another blue arrow points from the text box below to the red warning icon.

Notary fields themselves will show up as **blue**.



Red = Signer Not Found!

Red means that AutoPrep™ has found a signature line, but not a signer.

The screenshot shows a document titled "1johnsandysmith_title docs.pdf" (page 1 of 21) with a "Done" button in the top right. The document content includes:

- Loan Number: LOANNUMBER
- EVIDENCE OF JOINT APPLICATION**
- Date: APRIL 5, 2016
- Provided By: White House Bank
- Borrower: John Smith, Sandy Smith
- Property Address: 1234 MAIN STREET, TORRANCE, CALIFORNIA 90501

Below the address, there is a section for signing:

If you are applying for joint credit with another person, please sign below.
We intend to apply for joint credit.

There are three signature lines with dropdown menus and "Date" labels:

- Green field: JOHN SMITH (Borrower 1) [x]
- Blue field: Borrower John Smith [x]
- Light blue field: Notary [x]
- Red field: Borrower Sandy Smith [x]
- Red field: Select signer [x]

A vertical toolbar on the right side of the document contains icons for a checkmark, a plus sign, a warning triangle, and a plus sign. A blue arrow points from the top text box to the warning triangle icon. Another blue arrow points from the bottom text box to the red "Select signer" field.

Red fields MUST be eliminated before sending the document to proceed with eSign. This can be done by simply clicking on the field and assigning it, or by deleting it by clicking the 'x' to the right of the field.



You can assign any field at any time by clicking on it and selecting a Participant.

The screenshot displays a document titled "EVIDENCE OF JOINT APPLICATION" with the following details:

- Loan Number: LOANNUMBER
- Date: APRIL 5, 2016
- Provided By: White House Bank
- Borrower: John Smith, Sandy Smith
- Property Address: 1234 MAIN STREET, TORRANCE, CALIFORNIA 90501

Below the document content, there is a section for signing: "If you are applying for joint credit with another person, please sign below." This section contains three dropdown menus for assigning participants to fields:

- Field: Settlement Sample (indicated by a green pen icon) → Assigned to: JOHN SMITH (Borrower 1)
- Field: Originator Sample (indicated by a blue pen icon) → Assigned to: Notary
- Field: Underwriter Sample (indicated by a red pen icon) → Assigned to: Select signer

A legend on the left side of the signing area lists the available participants:

- JOHN SMITH (Borrower 1)
- SANDY SMITH (Borrower 2)
- Settlement Sample
- Originator Sample
- Underwriter Sample
- Notary

The interface also includes a "Done" button in the top right corner and a "Dell" logo at the bottom center.



Once you eliminate all red fields, the warning triangle icon will disappear, and the Done button will illuminate.

The screenshot displays the AutoPrep interface for reviewing a document titled "1Johnsandysmith_title docs.pdf" (page 1 of 21). The document content includes:

- Borrower: John Smith, Sandy Smith
- Property Address: 1234 MAIN STREET, TORRANCE, CALIFORNIA 90501
- Instruction: "If you are applying for joint credit with another person, please sign below."
- Statement: "We intend to apply for joint credit."

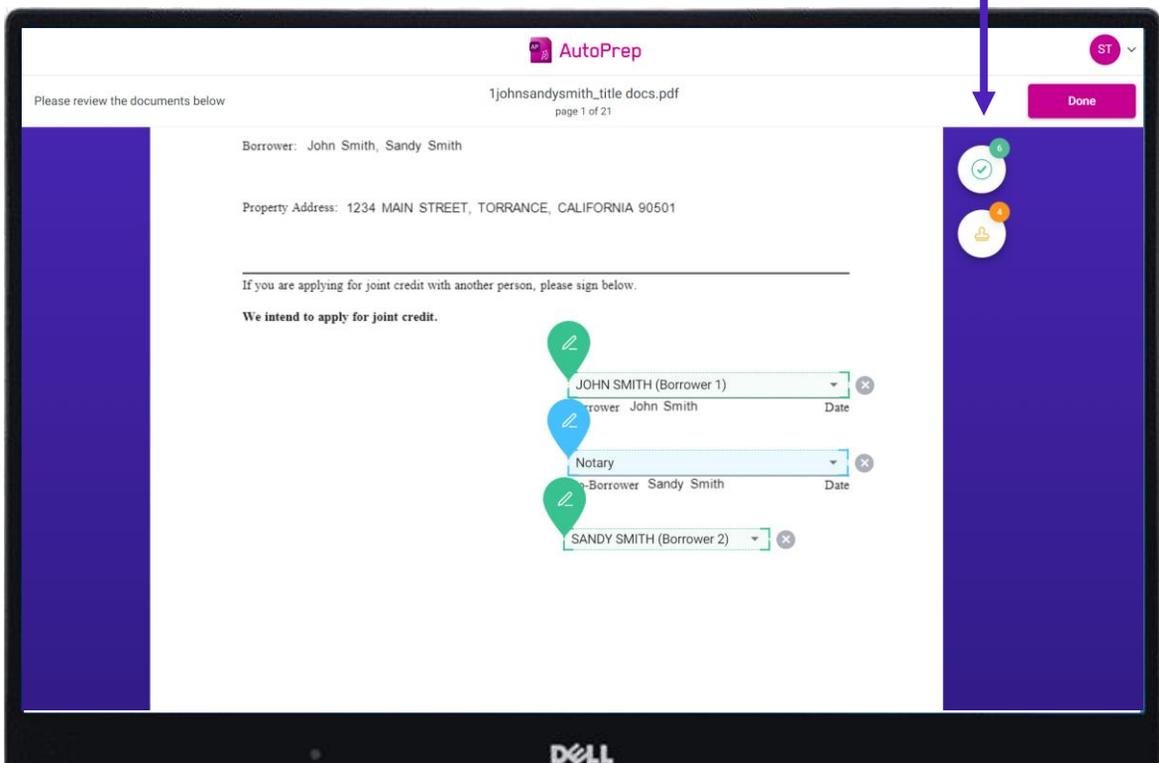
Below the statement, there are three signature fields, each with a green checkmark icon indicating they are correctly filled:

- Field 1: "JOHN SMITH (Borrower 1)" with a dropdown menu showing "Borrower John Smith" and a "Date" field.
- Field 2: "Notary" with a dropdown menu showing "Borrower Sandy Smith" and a "Date" field.
- Field 3: "SANDY SMITH (Borrower 2)" with a dropdown menu.

On the right side of the interface, there is a vertical sidebar with a "Done" button at the top, which is highlighted in pink. Below it are two circular icons: a green checkmark and a yellow warning triangle with a red exclamation mark. A purple arrow points from the text box above to the "Done" button.



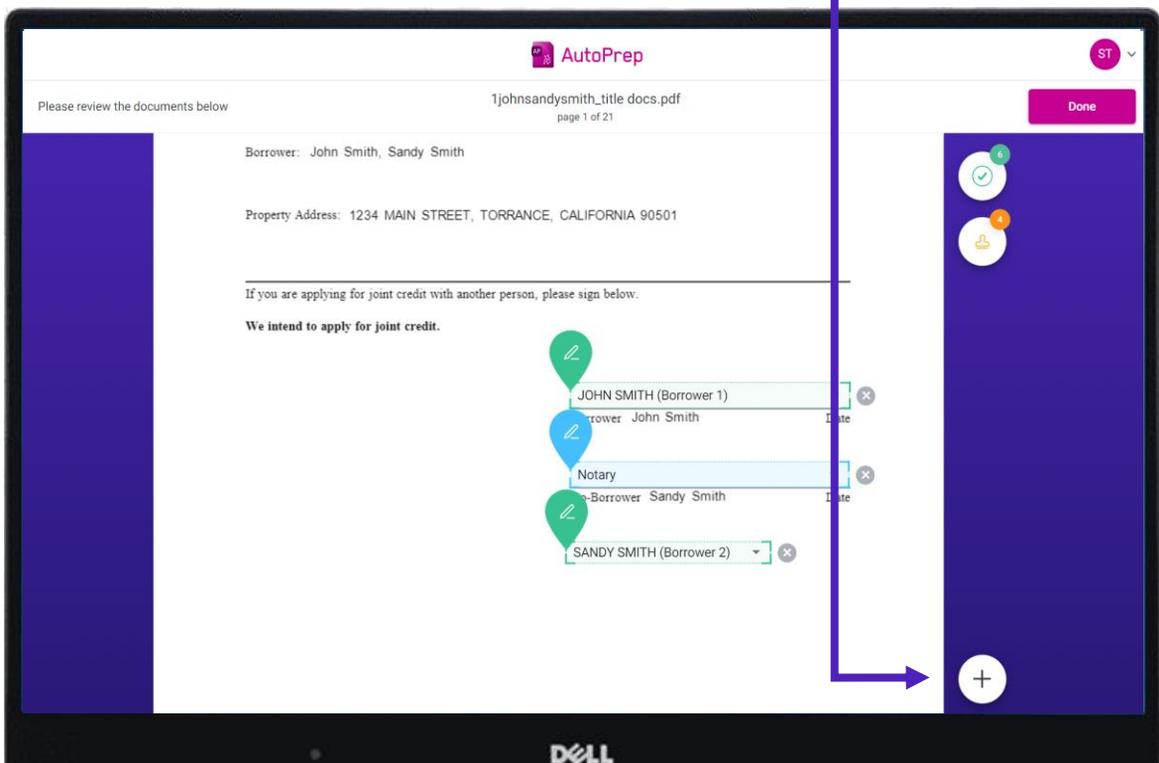
Clicking on an icon jumps you to the next tag of its kind in the document. This allows you to quickly toggle between similar tags and check them.



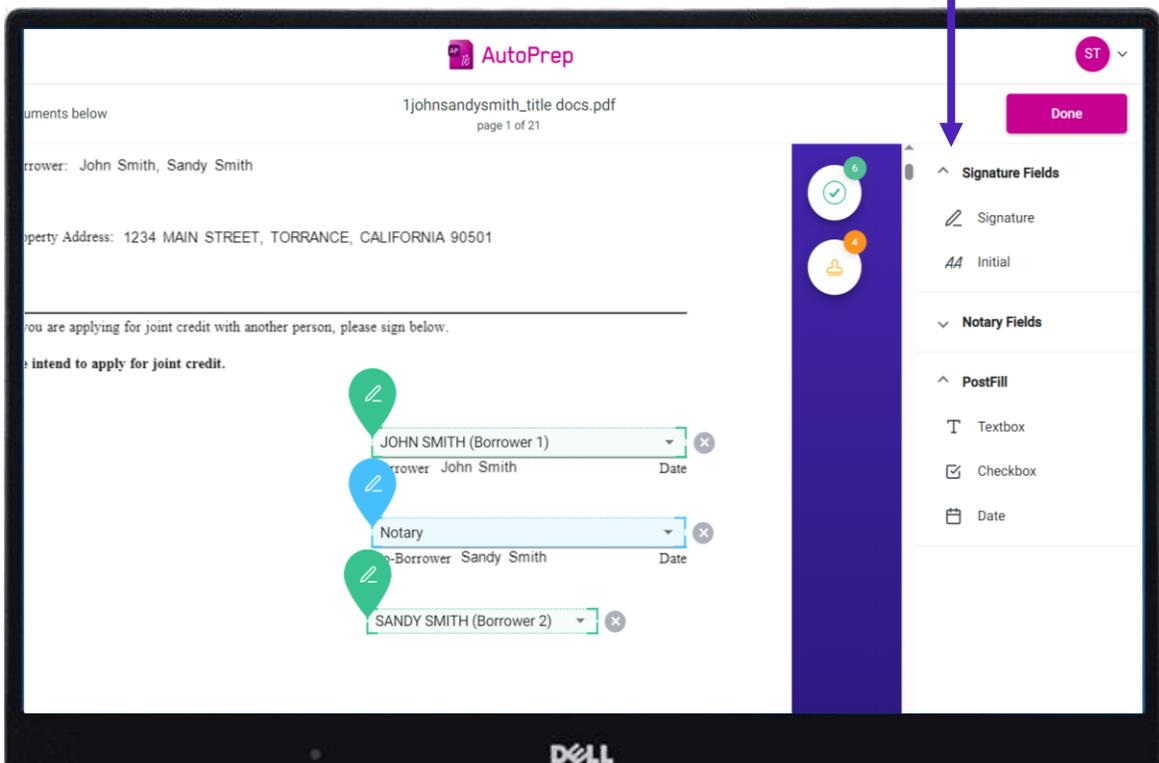
For example, if you continuously click on the green check mark icon, you can cycle through all the participant tags in the document. Try it!



If you want to add tags, click on the Plus (+) towards the bottom of the page. A menu will open on the right side of the page (shown on next slide).



Add tags by selecting the type you want and then dragging it to the desired spot on the document. Click on the dropdowns to expand your choices.



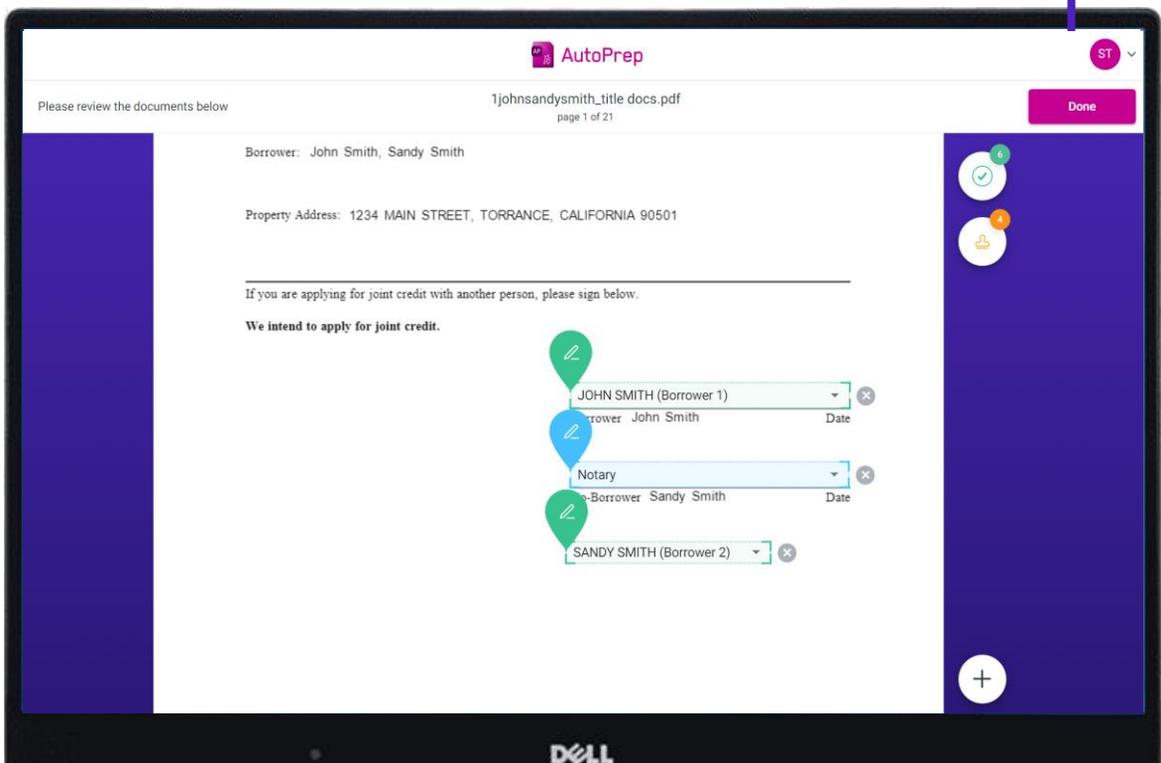
If applicable, please remember to assign your tags to a signer after placing them. If you forget to assign a tag that requires it, you'll activate the red warning triangle icon.

The screenshot displays the AutoPrep software interface. At the top, the document title is "1Johnsandysmith_title docs.pdf" (page 1 of 21). The borrower information is "John Smith, Sandy Smith" and the property address is "1234 MAIN STREET, TORRANCE, CALIFORNIA 90501". A section titled "We intend to apply for joint credit." contains a line for a signature with a red warning triangle icon and a "Select signer" dropdown menu. Below this, there are three signature fields: "JOHN SMITH (Borrower 1)", "Notary", and "SANDY SMITH (Borrower 2)". Each field has a date field and a "Date" label. A vertical toolbar on the right side of the screen contains several icons, including a red warning triangle icon with a "1" next to it, which is highlighted by a blue arrow pointing from the text box above. The toolbar also includes a checkmark icon with a "6", a person icon with an "8", and a warning triangle icon with a "1". The right sidebar shows a list of fields: "Signature Fields" (Signature, Initial), "Notary Fields", and "PostFill" (Textbox, Checkbox, Date).

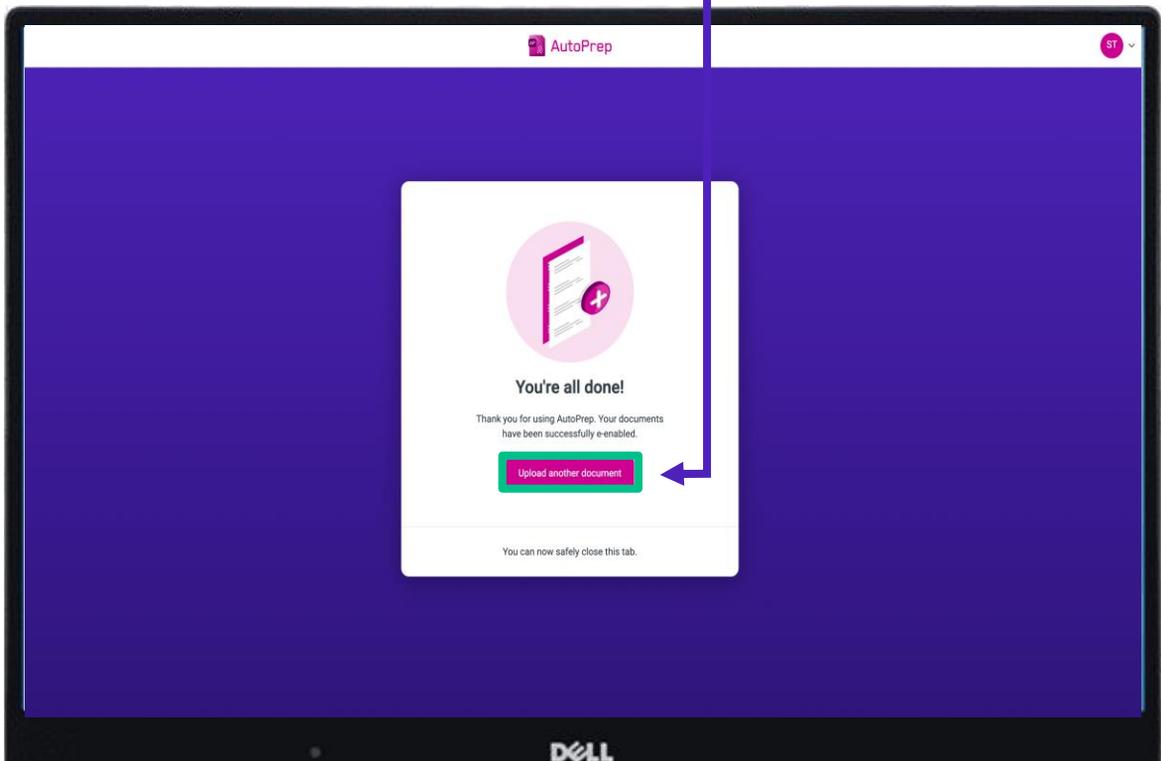


Done

Click Done when complete.



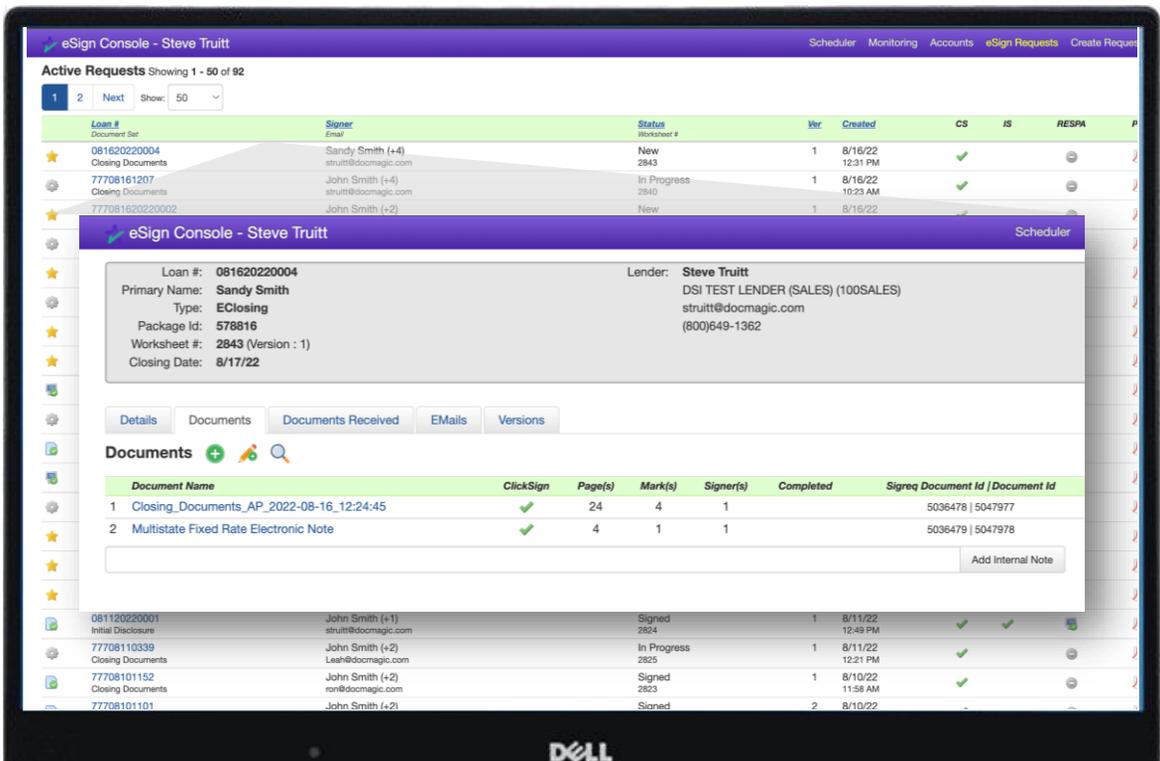
If you want to upload another document, click here. Otherwise, close the tab



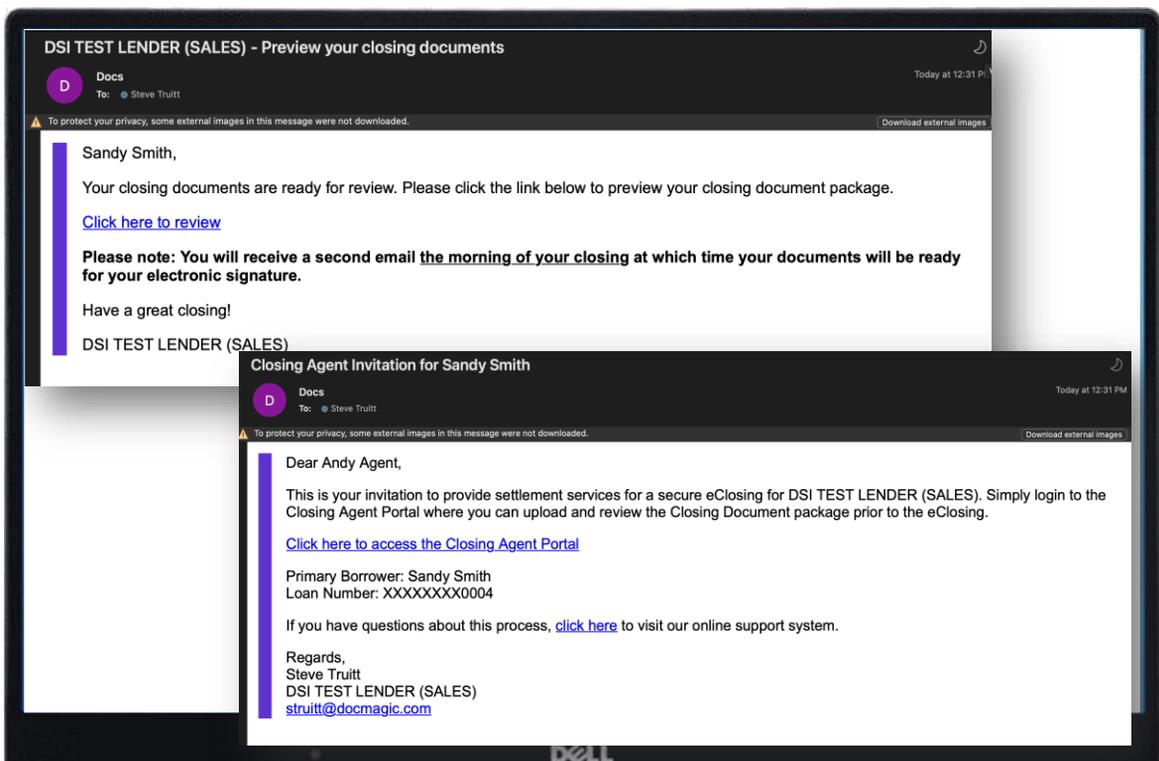
This confirmation lets you know you can now work from your eSign console. For additional information on how to use our eSign Console, please visit our [Product Training Page](#).



The AutoPrep™ – prepared loan will now be listed in your eSign console on your dashboard.



eSign email notifications will be sent to the participants, including the Settlement Agent and any additional signers.



The rest of this guide will focus on using AutoPrep™ from the Settlement Agent portal. Many of the functions are the same as before.

DocMagic eClose Console (Settlement Agent) Sally ▾

LOAN Loan #: 777-1616630796081
 Primary Borrower: Erica Sample
 Type: EClosing
 Package ID: 333727
 Worksheet #: 1616630796081 (Version: 1)

LENDER
 Company: DSI TEST LENDER (SALES)
 Contact: Michael Morford
 Email: mikem@docmagic.com
 Phone: (800) 649-1362

COUNTDOWN TO CLOSING
 DAYS: 0 HOURS: 6 MINUTES: 51 SECONDS: 26
 Date: Mar 25, 2021 (Thu) Time: 12:00am PDT

Signers (2) Assign Notary

#	Signer Name / Email	Role	Notary Name / Email	Notary Type / Closing Date - Time	KBA / Status	ID Verify / Status	Status	eSign
1	Erica Sample erica.sample@example.c...	Borrower	Notary_name_placehold... NOTARY_EMAIL_PLACE...	3/25/2021 - 12:00am	✉ ○	📄 ○	● Not Started	Open Signing Room
2	Sally Settlement sally.settlement@examp...	Settlement Agent	Unassigned				● Ready to Sign	Open Signing Room

Documents (15) Preview Mode ON

#	eSign Enabled	Page(s)	Signer(s)	Completed
1	Uniform Residential Loan Application	9	1	✓
2	MERS California Deed of Trust	16	2	✓
3	Specific Closing Instructions	3	2	✓
4	California Hazard Insurance Disclosure	1	1	✓
5	Hazard Insurance Authorization and Requirements	2	1	✓
6	Borrower Consent to the Use of Tax Return Information	1	1	✓

For more information about the Settlement Agent Portal, please visit our [Product Training Page](#).



AutoPrep™ – Settlement Agent

Uploading a File

When you need to add a document to the stack that requires signatures, click on the page icon below to upload it.

The screenshot shows the DocMagic Settlement Agent console. At the top, there's a header with 'DocMagic' and 'Close Console (Settlement Agent)'. Below the header, there are sections for 'LOAN' (Loan #: 777-1616630796081, Primary Borrower: Erica Sample, Title: EClosing, Package ID: 333727, Worksheet #: 1616630796081 (Version: 1)), 'LENDER' (Company: DSI TEST LENDER (SALES), Contact: Michael Morford, Email: mikem@docmagic.com, Phone: (800) 649-1362), and 'COUNTDOWN TO CLOSING' (Days: 0, Hours: 6, Minutes: 51, Seconds: 26, Date: Mar 25, 2021 (Thu), Time: 12:00am PDT). There are also buttons for 'Ready to Close', 'Assign Notary', 'Open Signing Room', and 'Ready to Sign'. A 'Signers (2)' table lists Erica Sample and Sally Settlement. A 'Documents (15)' table lists various documents like 'Uniform Residential Loan Application', 'MERS California Deed of Trust', etc. A blue arrow points from the text above to the 'page icon' in the 'Documents (15)' section. An 'Upload a new document' dialog box is open, showing a 'Document:' field, a 'Browse' button, and 'Cancel' and 'Submit' buttons.

#	eSign Enabled	Page(s)	Signer(s)	Completed
1	Uniform Residential Loan Application	9	1	✓
2	MERS California Deed of Trust	16	2	✓
3	Specific Closing Instructions	3	2	✓
4	California Hazard Insurance Disclosure	1	1	✓
5	Hazard Insurance Authorization and Requirements	2	1	✓
6	Borrower Consent to the Use of Tax Return Information	1	1	✓

Any file you upload to the Documents section will automatically trigger AutoPrep™.



AutoPrep™ – Settlement Agent

Uploading a File

Click the Browse button to navigate to the document you would like to add to the package.

The screenshot displays the DocMagic eClose Console (Settlement Agent) interface. The console shows loan details for Loan # 777-1616630796081, with a primary borrower of Erica Sample and a lender of DSI TEST LENDER (SALES). A countdown timer indicates 6 hours, 51 minutes, and 26 seconds remaining until closing on Mar 25, 2021. A file explorer window is open over the console, showing the Desktop directory with the file 'AZACPRS.TTL.pdf' selected. A green box highlights the 'Browse' button in the console interface, which is used to upload the selected file.

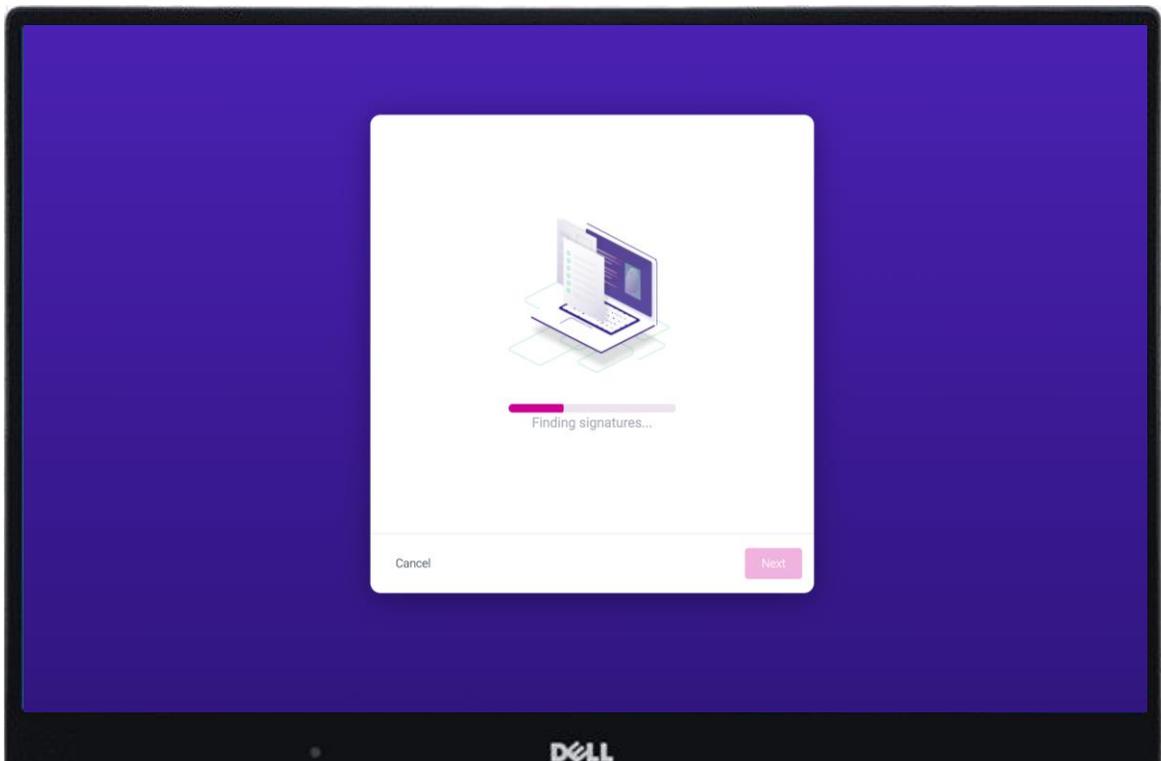
Item	Count	Completed
1	1	✓
2	1	✓
2	1	✓
1	1	✓
5	2	1
6	1	1



AutoPrep™ – Settlement Agent

AutoPrep™ = (Doc)MAGIC

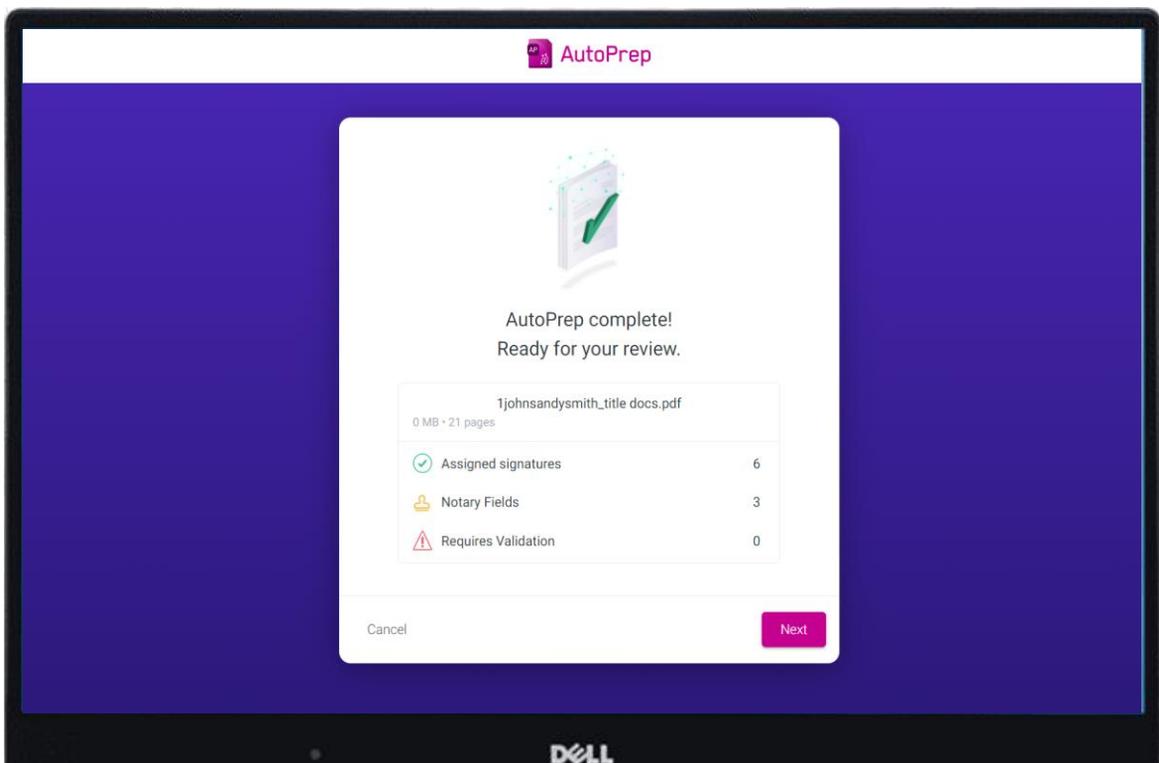
AutoPrep™ will use Optical Character Recognition (OCR) and A.I. to identify signatures lines for Borrowers and other participants including Notaries.



AutoPrep™ – Settlement Agent

Document Pre-Review

This screen will confirm the number of signatures, notary fields, and unassigned signatures found.



AutoPrep™ – Settlement Agent

Green = Identified Field

Green means that the field has been identified to match a previously entered participant.

Please review the documents below

1johnsandysmith_title docs.pdf
page 1 of 21

Done

Loan Number: LOANNUMBER

EVIDENCE OF JOINT APPLICATION

Date: APRIL 5, 2016
Provided By: White House Bank
Borrower: John Smith, Sandy Smith
Property Address: 1234 MAIN STREET, TORRANCE, CALIFORNIA 90501

If you are applying for joint credit with another person, please sign below.

We intend to apply for joint credit.



AutoPrep™ – Settlement Agent

Notary Field = Orange / Blue

If electronic notarization is applicable, you may see an **orange** icon indicating that an item has been identified as a Notary field.

The screenshot displays a document titled "1johnsandysmith_title docs.pdf" (page 1 of 21) with the heading "EVIDENCE OF JOINT APPLICATION". The document content includes: "Date: APRIL 5, 2016", "Provided By: White House Bank", "Borrower: John Smith, Sandy Smith", and "Property Address: 1234 MAIN STREET, TORRANCE, CALIFORNIA 90501". Below this, there is a section for joint credit application with a table of signers:

Signer	Date
JOHN SMITH (Borrower 1)	
Borrower John Smith	
Notary	
Borrower Sandy Smith	
Select signer	

The "Notary" row is highlighted in blue, and a blue icon is visible next to it. A red icon is visible next to the "Borrower Sandy Smith" row. On the right side of the interface, there is a vertical toolbar with three icons: a green checkmark, an orange warning triangle, and a red warning triangle. A blue arrow points from the text box above to the orange warning icon, and another blue arrow points from the text box below to the blue icon next to the Notary field.

Notary fields themselves will show up as **blue**.



AutoPrep™ – Settlement Agent

Red = Signer Not Found!

Red means that AutoPrep™ has found a signature line, but not a signer.

The screenshot shows a document review interface for a PDF titled "1johnsandysmith_title docs.pdf" (page 1 of 21). The document content includes:

- Loan Number: LOANNUMBER
- EVIDENCE OF JOINT APPLICATION**
- Date: APRIL 5, 2016
- Provided By: White House Bank
- Borrower: John Smith, Sandy Smith
- Property Address: 1234 MAIN STREET, TORRANCE, CALIFORNIA 90501

Below the address, there is a section for joint credit application with the following fields:

- JOHN SMITH (Borrower 1) [Green checkmark icon]
- Borrower John Smith [Blue checkmark icon] Date
- Notary [Blue checkmark icon]
- Borrower Sandy Smith [Blue checkmark icon] Date
- Select signer [Red error icon]

On the right side of the interface, there is a vertical toolbar with icons for a checkmark (green), a document (orange), and a warning triangle (red). A blue arrow points from the text box above to the warning icon. Another blue arrow points from the text box above to the "Select signer" field, which has a red error icon next to it.

Red fields MUST be eliminated before sending the document to proceed with eSign. This can be done by simply clicking on the field and assigning it, or by deleting it by clicking the 'x' to the right of the field.



AutoPrep™ – Settlement Agent

Assigning Fields

You can assign any field at any time by clicking on it and selecting a Participant.

The screenshot displays a document review interface. At the top, it says "Please review the documents below" and "1johnsandysmith_title docs.pdf page 1 of 21". The document content includes:

- Loan Number: LOANNUMBER
- EVIDENCE OF JOINT APPLICATION**
- Date: APRIL 5, 2016
- Provided By: White House Bank
- Borrower: John Smith, Sandy Smith
- Property Address: 1234 MAIN STREET, TORRANCE, CALIFORNIA 90501

Below the document, there is a section for signing: "If you are applying for joint credit with another person, please sign below." A sidebar on the left lists participants and samples:

- JOHN SMITH (Borrower 1)
- SANDY SMITH (Borrower 2)
- Settlement Sample
- Originator Sample
- Underwriter Sample
- Notary

On the right, there are three signature fields with dropdown menus and "Date" labels:

- JOHN SMITH (Borrower 1) - Borrower John Smith
- Notary - Borrower Sandy Smith
- Select signer

Blue arrows point from the dropdown menus to the corresponding participant names in the sidebar. A red arrow points from the "Select signer" dropdown to the "Notary" entry in the sidebar. On the far right, there are navigation icons: a checkmark, a share icon, a warning icon, and a plus sign.



AutoPrep™ – Settlement Agent

Assigning Fields

Once you eliminate all red fields, the warning triangle icon will disappear, and the Done button will illuminate.

The screenshot displays the AutoPrep interface for reviewing a document titled "1Johnsandysmith_title docs.pdf" (page 1 of 21). The document content includes:

- Borrower: John Smith, Sandy Smith
- Property Address: 1234 MAIN STREET, TORRANCE, CALIFORNIA 90501
- Instruction: If you are applying for joint credit with another person, please sign below.
- Statement: We intend to apply for joint credit.

Below the text, there are three signature fields, each with a green checkmark icon indicating they are correctly assigned:

- Field 1: JOHN SMITH (Borrower 1) [dropdown] [x] with "Borrower John Smith" and "Date" labels.
- Field 2: Notary [dropdown] [x] with "Borrower Sandy Smith" and "Date" labels.
- Field 3: SANDY SMITH (Borrower 2) [dropdown] [x]

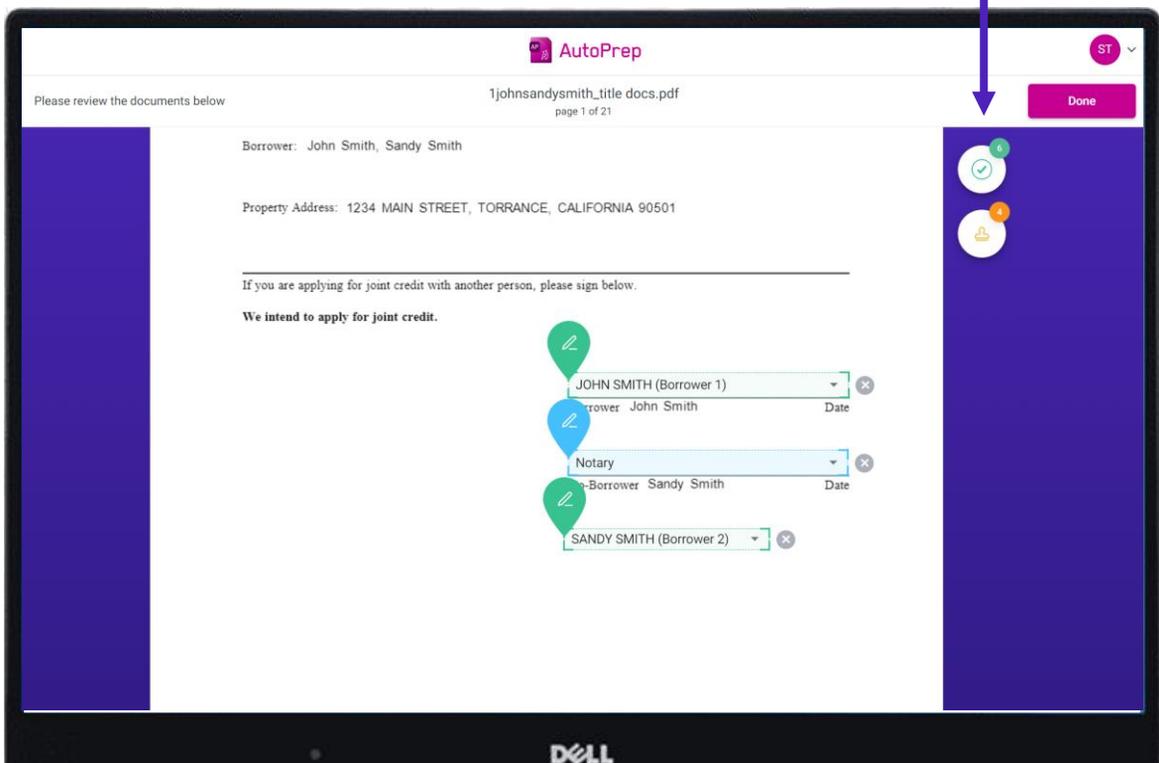
On the right side of the interface, there is a vertical sidebar with a "Done" button at the top, which is highlighted in pink. Below it are two circular icons: a green checkmark and a yellow warning triangle with a red exclamation mark. A purple arrow points from the text box above to the "Done" button.



AutoPrep™ – Settlement Agent

Toggling and Checking Tags

Clicking on an icon jumps you to the next tag of its kind in the document. This allows you to quickly toggle between similar tags and check them.



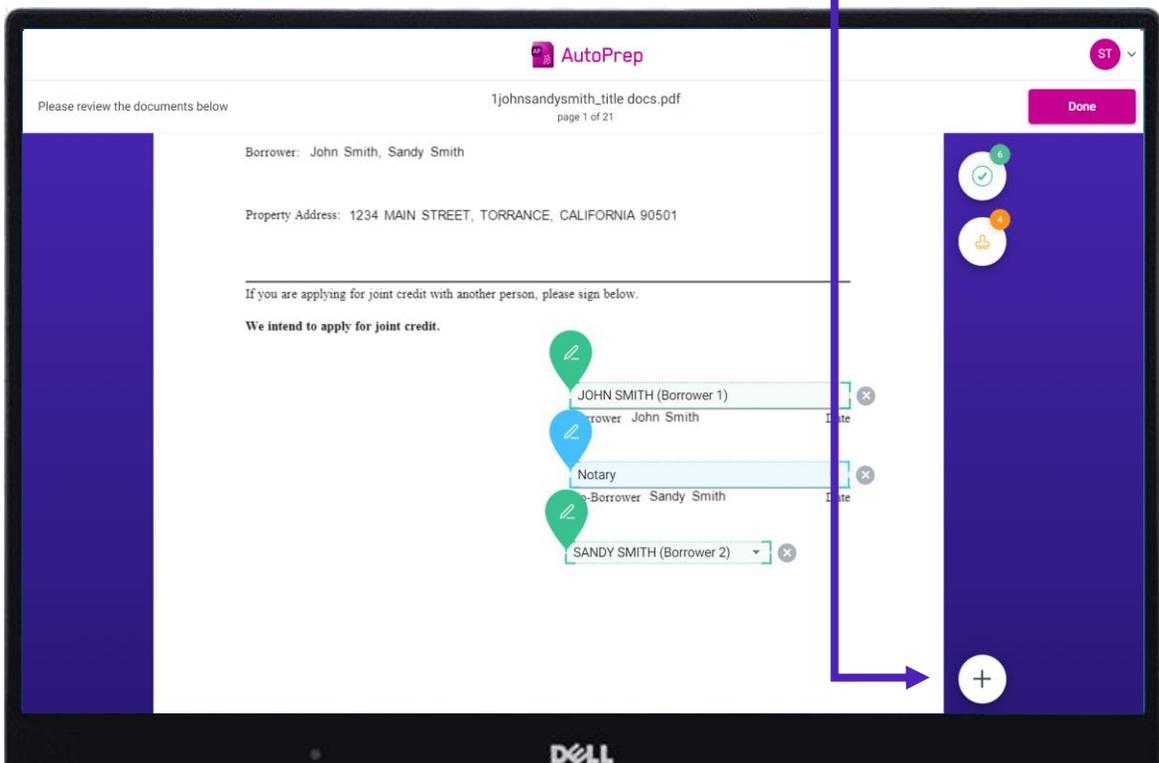
For example, if you continuously click on the green check mark icon, you can cycle through all the participant tags in the document. Try it!



AutoPrep™ – Settlement Agent

Adding Tags

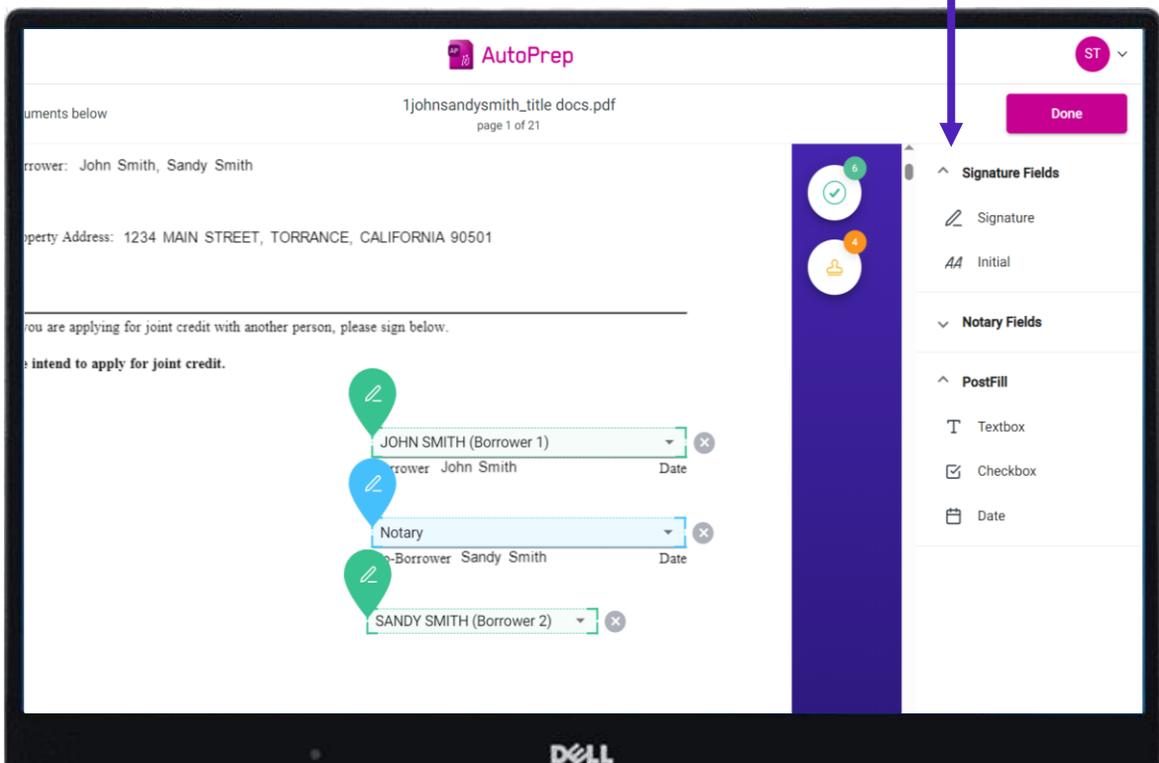
If you want to add tags, click on the Plus (+) towards the bottom of the page. A menu will open on the right side of the page (shown on next slide).



AutoPrep™ – Settlement Agent

Adding Tags

Add tags by selecting the type you want and then dragging it to the desired spot on the document. Click on the dropdowns to expand your choices.



AutoPrep™ – Settlement Agent

Adding Tags

If applicable, please remember to assign your tags to a signer after placing them. If you forget to assign a tag that requires it, you'll activate the red warning triangle icon.

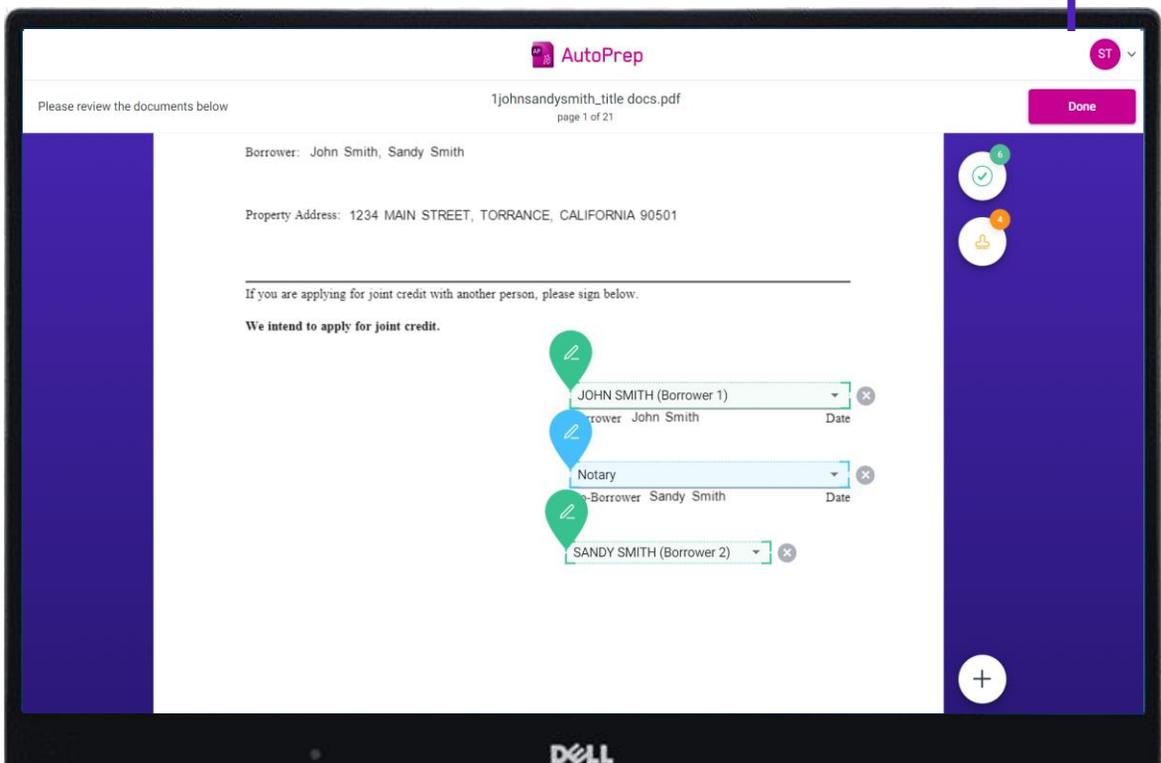
The screenshot displays the AutoPrep interface for document preparation. At the top, the document title is "1Johnsandysmith_title docs.pdf" (page 1 of 21). The borrower information is "John Smith, Sandy Smith" and the property address is "1234 MAIN STREET, TORRANCE, CALIFORNIA 90501". A section titled "We intend to apply for joint credit." contains a line for a signature with a red warning triangle icon and a dropdown menu labeled "Select signer". Below this, there are three signature fields: "JOHN SMITH (Borrower 1)", "Notary", and "SANDY SMITH (Borrower 2)". Each field has a date field next to it. A sidebar on the right lists field types: Signature Fields (Signature, Initial), Notary Fields, and PostFill (Textbox, Checkbox, Date). A vertical toolbar on the left side of the sidebar contains icons for adding fields, with a red warning triangle icon at the bottom.



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Done

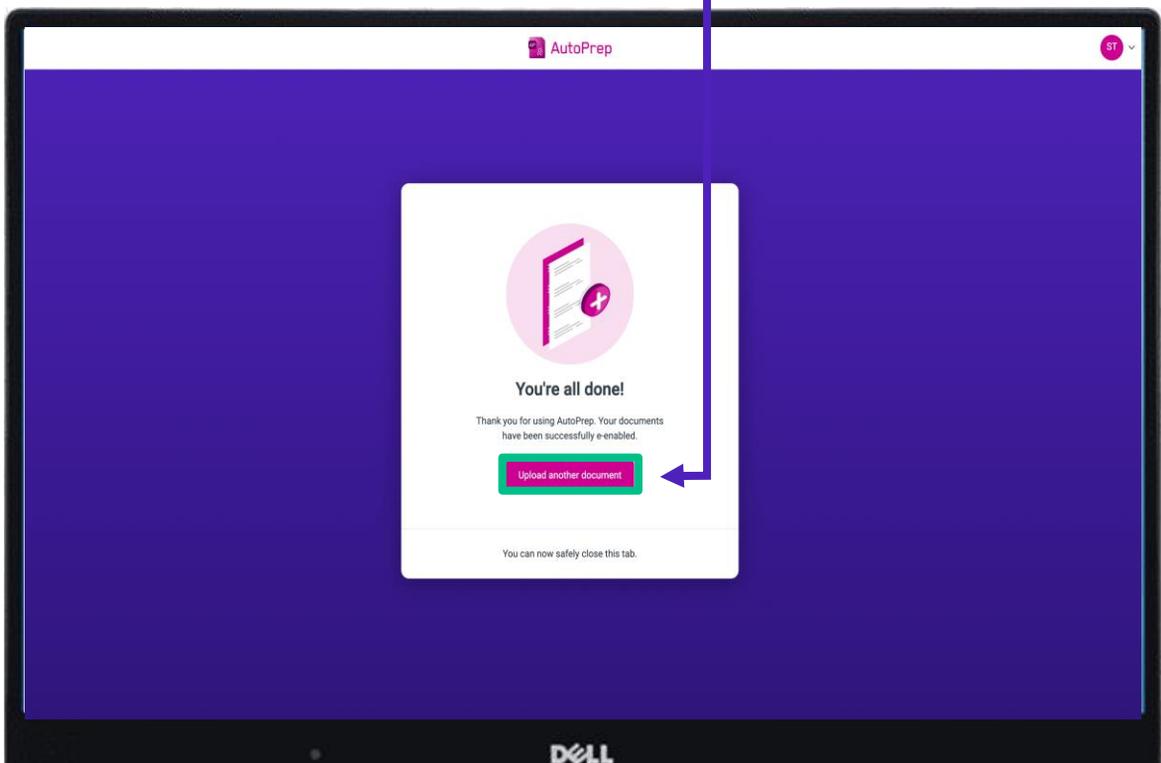
Click Done when complete.



AutoPrep™ – Settlement Agent

Confirmation

If you want to upload another document, click here. Otherwise, close the tab and you'll be taken back to your Settlement Agent console.



Additional Resources

Product Training Page

Product Training

Welcome to the DocMagic Product Training Page

We've assembled a library of videos, guidebooks and other materials that will provide you with the tools to successfully navigate our products, or those of our partners.

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- Encompass
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