

AutoPrep™

User Guide – 2026 Revision

eSign & eClose Console

Launch Center

Triggering AutoPrep From A User Console

eSign Console - Alan Dai

Loan #: 777072820260001
Primary Name: John Smith
Type: EClosing
Package Id: 1674842
Worksheet #: 4430 (Version : 1)
Closing Date: 8/7/26

DetailsDocumentsDocuments ReceivedEmailsVersions

Documents

Document Name

Evidence of Joint Application

New Jersey Addendum to Residential Mortgage Loan Application

New Jersey Addendum to Residential Mortgage Loan Application

Uniform Residential Loan Application

Uniform Residential Loan Application

Multistate Fixed Rate Note

New Jersey Mortgage (MERS)

General Closing Instructions

Specific Closing Instructions

Borrower's Certification, Authorization and Consent

Borrower's Certification, Authorization and Consent

Certificate of Loans to One Borrower

Hazard Insurance Authorization and Requirements

IVES Request for Transcript of Tax Return

IVES Request for Transcript of Tax Return

W9 - Payers Request for Taxpayer ID

W9 - Payers Request for Taxpayer ID

DocMagic eClose Console (Settlement Agent)

LOAN

Loan #: 777072820260001
Primary Borrower: John Smith
Type: EClosing
Package ID: 1674842
Worksheet #: 4430 (Version: 1)

LENDER

DetailseJournalAction Log

Signers (3)

#	Signer Name / Email	Role	Notary Name / Email
1	John Smith aland@docmagic.com	Borrower	Notary_name_placeholde... NOTARY_EMAIL_PLACE...
2	Sandy Smith aland@docmagic.com	Borrower	Notary_name_placeholde... NOTARY_EMAIL_PLACE...
3	Byron Oden aland@docmagic.com	Settlement Agent	

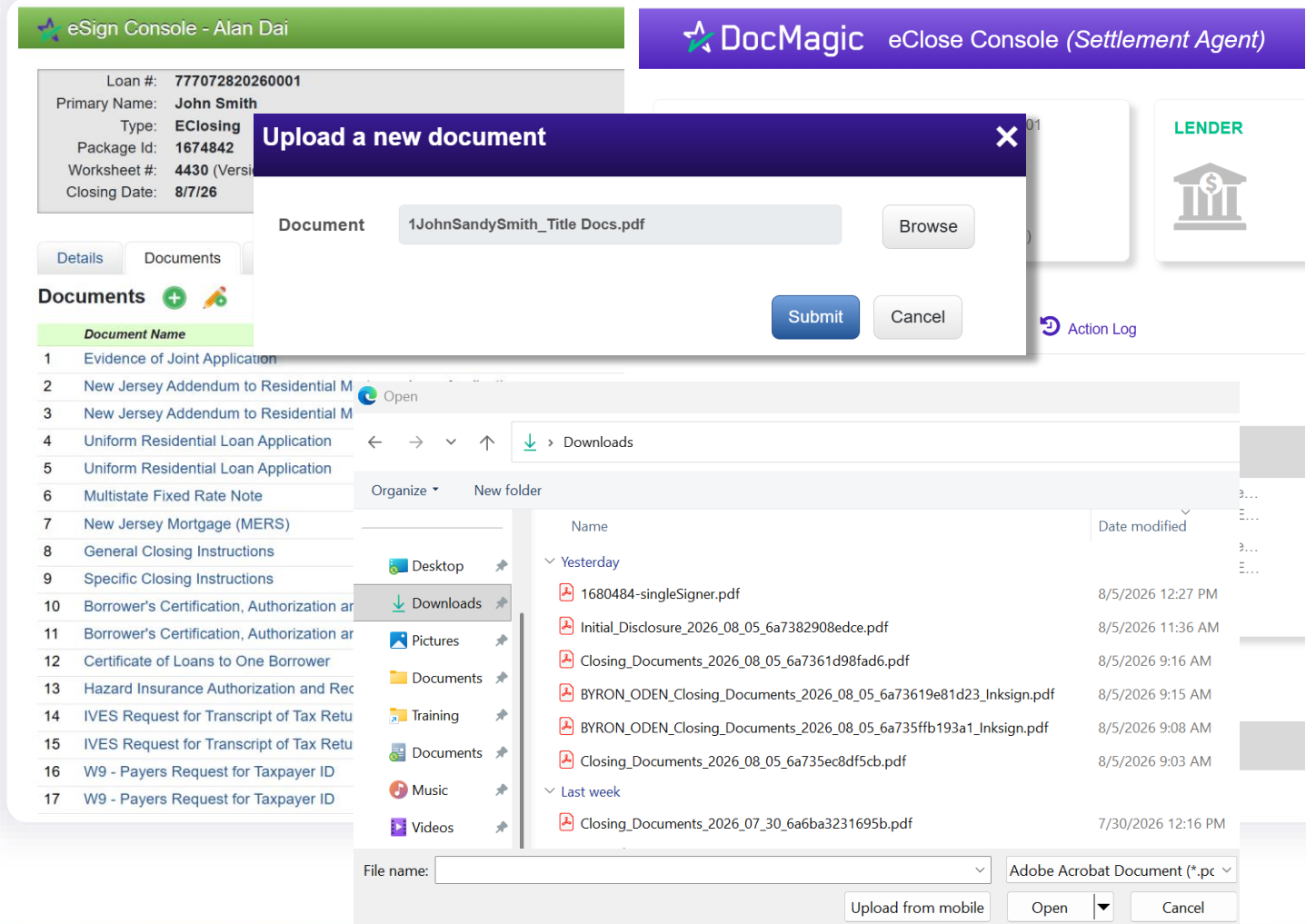
Documents (36)

eSign Enabled

Evidence of Joint Application

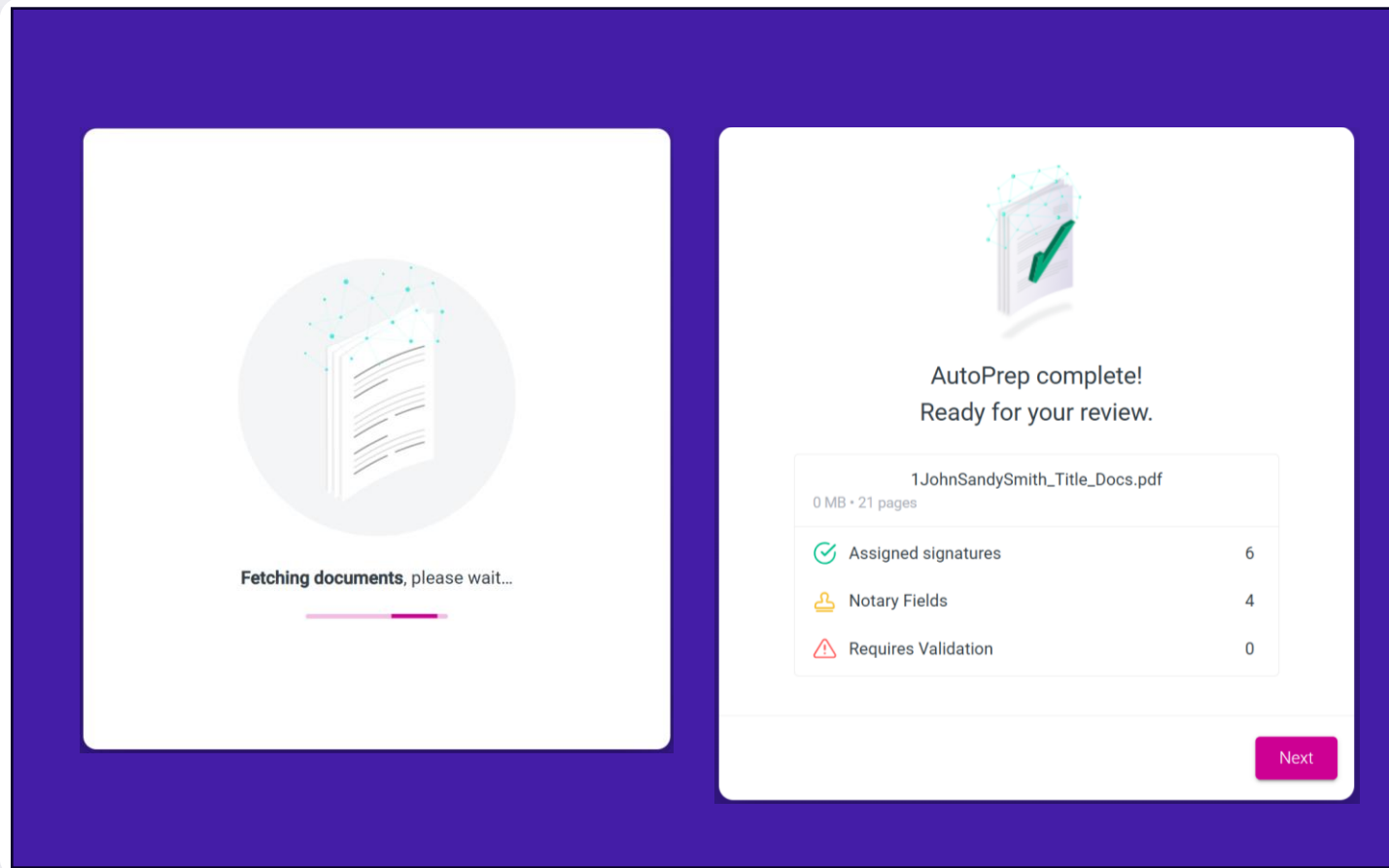
- For most users, AutoPrep is encountered when additional documents need to be added to an existing eSign package.
- In the consoles listed below, adding a document to the stack post-generation using the plus (+) icon next to Documents will trigger AutoPrep:
 - eSign Console (Lender)
 - Settlement Agent eClose Console
 - Notary eClose Console
- AutoPrep analyzes the uploaded document, identifies signature and notary fields, and prepares it for use within the existing transaction.

Triggering AutoPrep From A User Console



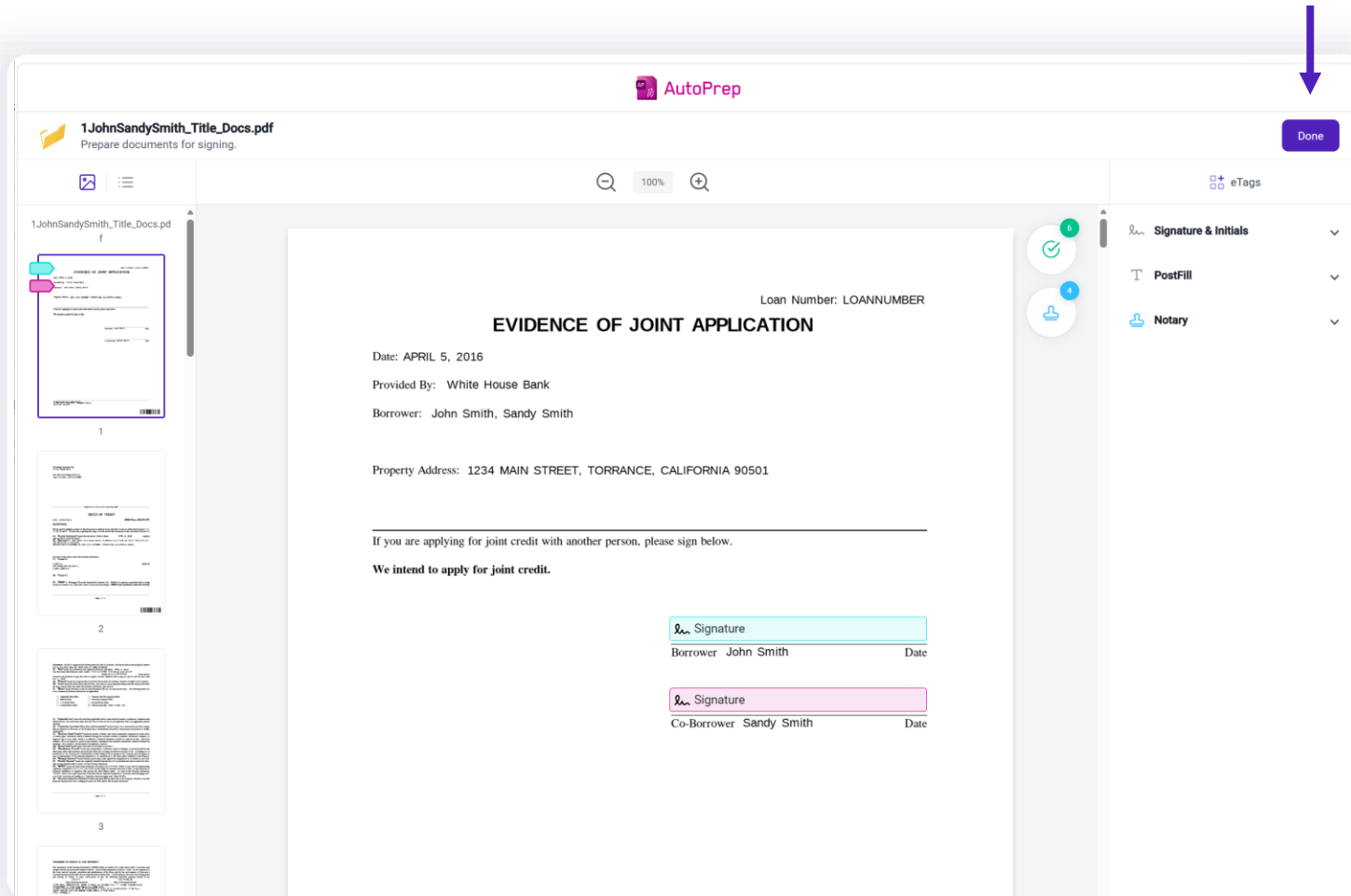
- After clicking the Plus (+) icon you will be prompted to select a document.
- Click Browse to choose a file from your computer, then hit Submit to upload it and trigger AutoPrep.

Triggering AutoPrep From A User Console



- AutoPrep scans the uploaded document and compares its contents to the participants associated with the transaction.
- Using this information, it automatically identifies and assigns signature, initial, and notary tags to the appropriate participants.
- Once processing is complete, a summary of the results is displayed, and you will be prompted to click Next.

Triggering AutoPrep From A User Console



- You will be taken to the [Document Editor](#), where you can review AutoPrep's results and make any necessary adjustments.
- If no changes are needed, click Done in the upper-right corner.

Triggering AutoPrep From A User Console

☆ eSign Console - Alan Dai

SchedulerMonitoringAccountseSign Requestscancel RequestSearchAccount

34	Signature Affidavit and AKA Statement	✓	2	10	2	10001346 10024632	saakas.msc.xml
35	Signature Affidavit and AKA Statement	✓	2	10	2	10001347 10024633	saakas.msc.xml
36	Tax Record Info Sheet	✓					gatax.lsr-agent.xml
37	1JohnSandySmith_Title_Docs	✓					1JohnSandySmith_Title_Docs.pdf

☆ DocMagic eClose Console

33	Payment Letter to Borrower						
34	Signature Affidavit and AKA Statement						
35	Signature Affidavit and AKA Statement						
36	Tax Record Info Sheet						
37	1JohnSandySmith_Title_Docs						

You're all done!

Thank you for using AutoPrep. Your documents have been successfully e-enabled.

You can now safely close this tab.

Cancel Request

Delete Request

Byron

2	✓	
2	✓	
2	✓	
1	✓	
3	✓	

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Home

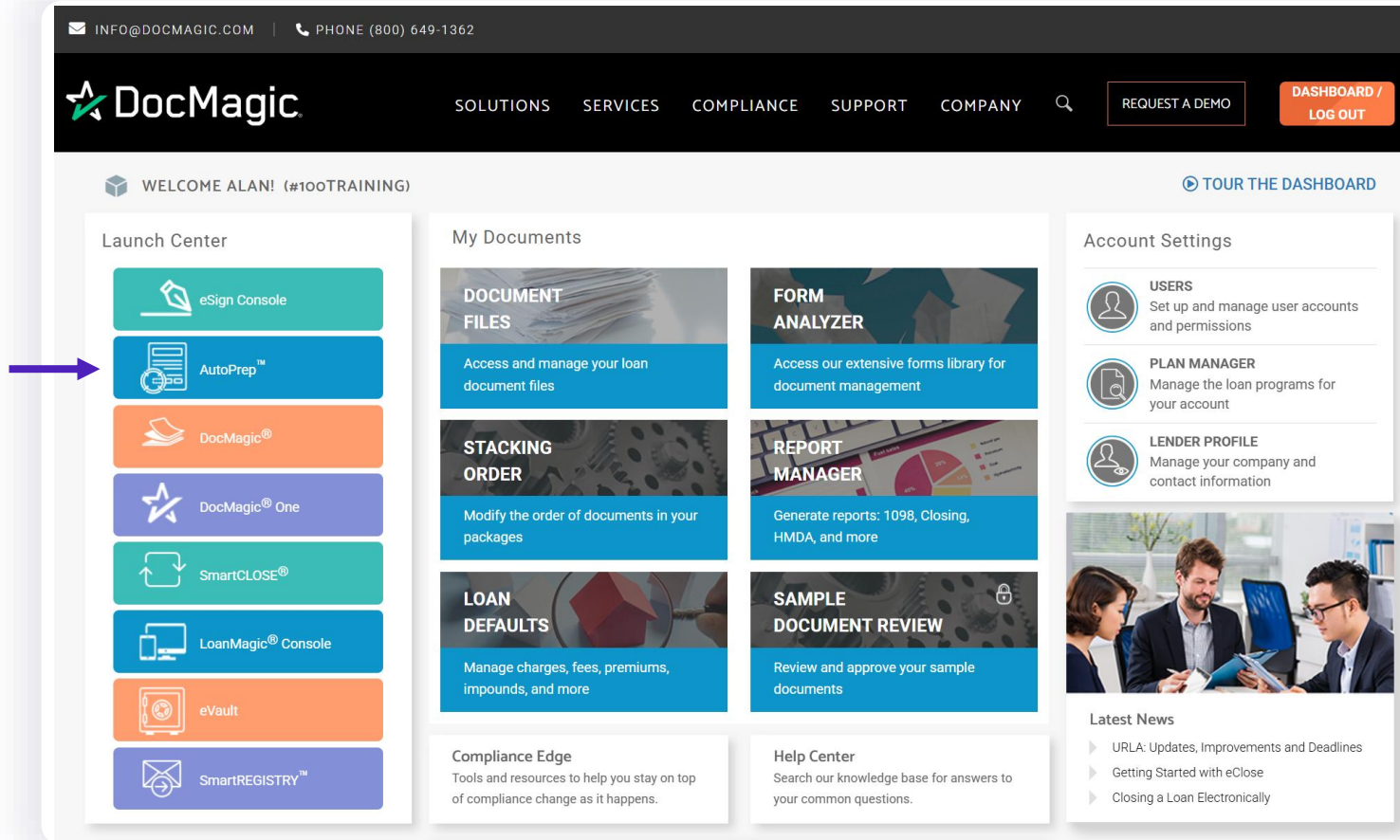
Contact

Privacy Policy

Terms of Use

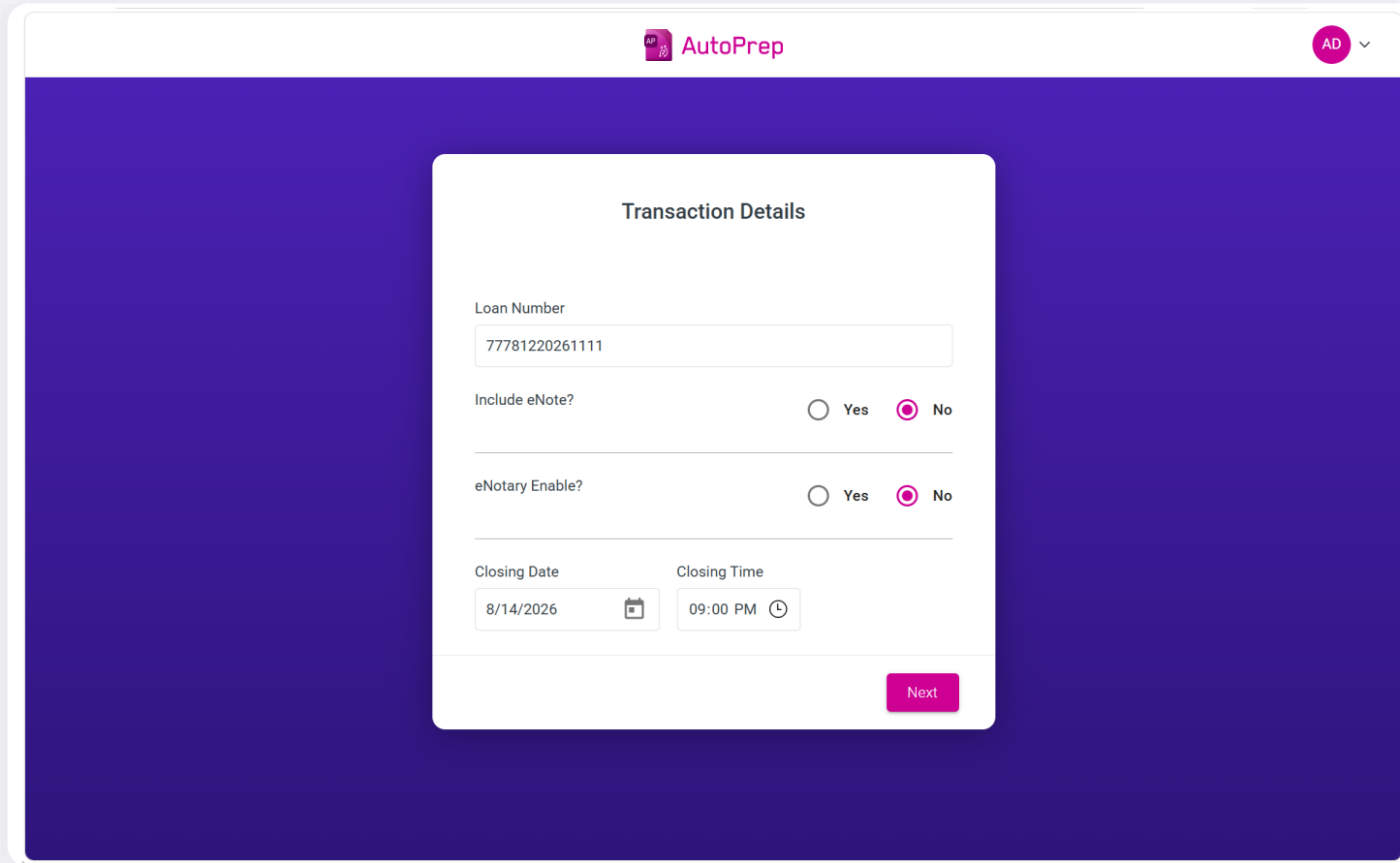
- A confirmation message will appear indicating that document preparation is complete and that you may close the AutoPrep window.
- Return to your user console, where the newly added document will now appear at the bottom of the document stack.

Creating a New Package From AutoPrep



- While most users encounter AutoPrep when adding documents to an existing transaction, it can also be used to create a package from scratch.
- Upload a document, enter the required loan and participant information, and AutoPrep will prepare the document for electronic signing and notarization.
- To begin, launch AutoPrep directly from your DocMagic Dashboard.

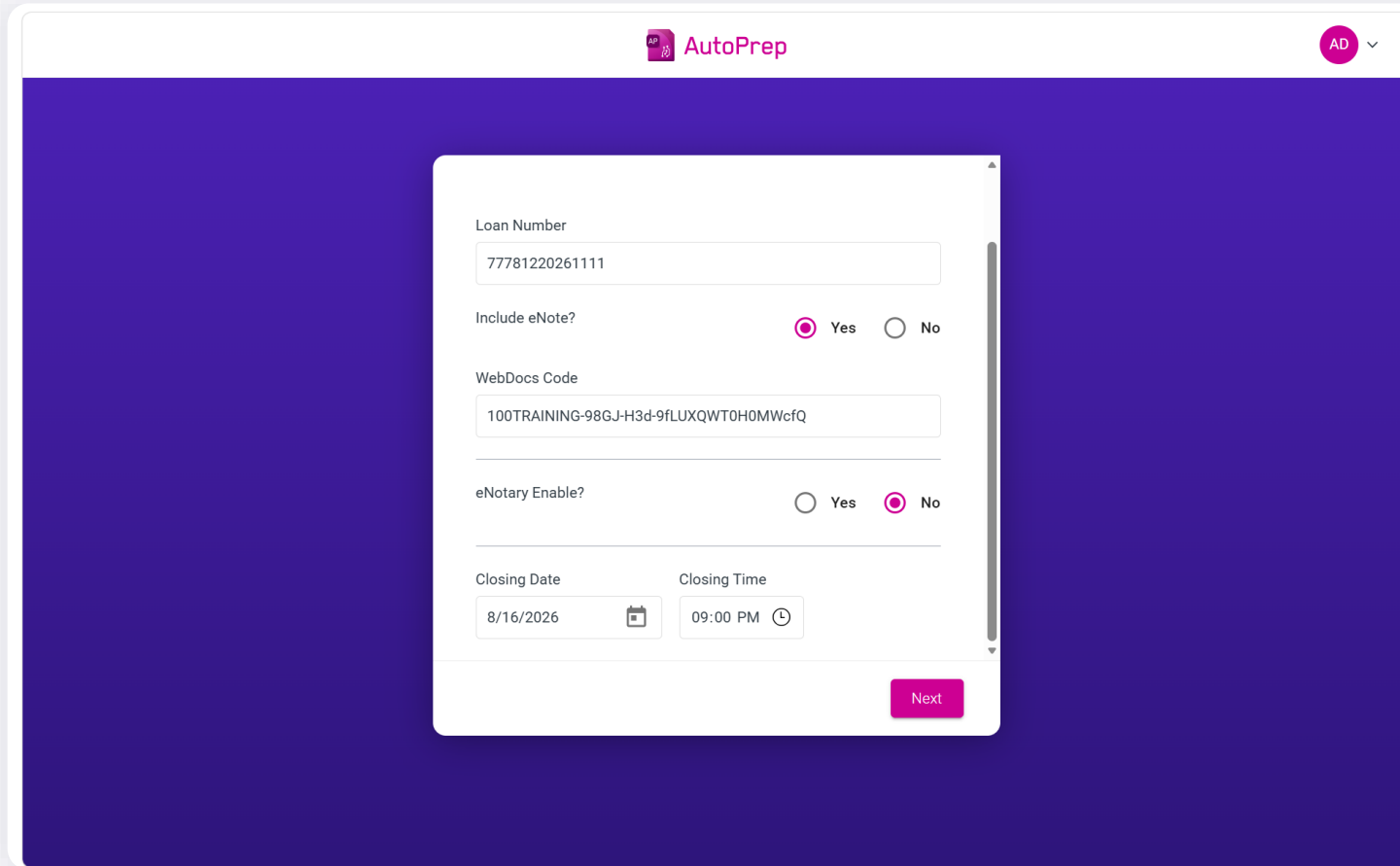
Creating a New Package From AutoPrep



The screenshot shows the 'AutoPrep' application interface. At the top, there is a header bar with the 'AutoPrep' logo on the left and a user profile icon labeled 'AD' on the right. The main content area has a dark blue background. In the center, there is a white card titled 'Transaction Details'. Inside this card, there are several input fields and radio buttons. The 'Loan Number' field contains the text '77781220261111'. Below it, the 'Include eNote?' section has two radio buttons: 'Yes' (unselected) and 'No' (selected). The 'eNotary Enable?' section also has two radio buttons: 'Yes' (unselected) and 'No' (selected). At the bottom of the card, there are two fields: 'Closing Date' with the value '8/14/2026' and a calendar icon, and 'Closing Time' with the value '09:00 PM' and a clock icon. A pink 'Next' button is located at the bottom right of the card.

- Begin by entering the Loan Number, which serves as the unique identifier for the AutoPrep transaction. You must also enter a Closing Date and Closing Time before proceeding.
- By default, both Include eNote and eNotary Enabled are set to No.
- Transactions that require an eNote or eNotary will be covered in the following sections.

Creating a New Package From AutoPrep



The screenshot shows the AutoPrep web interface. At the top, there is a header with the AutoPrep logo and a user profile icon labeled 'AD'. The main content area is a dark blue background with a white modal form in the center. The form contains the following fields and options:

- Loan Number:** A text input field containing '77781220261111'.
- Include eNote?:** Radio button options for 'Yes' (selected) and 'No'.
- WebDocs Code:** A text input field containing '100TRAINING-98GJ-H3d-9fLUXQWT0H0MWcfQ'.
- eNotary Enable?:** Radio button options for 'Yes' and 'No' (selected).
- Closing Date:** A date input field showing '8/16/2026' with a calendar icon.
- Closing Time:** A time input field showing '09:00 PM' with a clock icon.
- Next:** A pink button at the bottom right of the form.

- If your transaction includes an eNote, you will need to provide the corresponding WebDocs Retrieval Code. This code can be obtained by generating an eNote in DocMagic Online.
- If your transaction requires eNotary, simply set eNotary Enabled to Yes. This will configure the package for electronic notarization and make the appropriate eNotary options available throughout the workflow. *Please note that if you do not check this box, the Settlement Agent will not be able to assign a notary from their portal.*

Creating a New Package From AutoPrep

The screenshot shows the AutoPrep interface with a 'Borrower Details' form. The form is titled 'Borrower Details' and has a sub-header 'BORROWER 1' with a question mark icon. The form contains the following fields:

- First Name ***: A text input field containing 'JOHN'.
- Middle Name**: An empty text input field.
- Last Name ***: A text input field containing 'SMITH'.
- Suffix**: An empty text input field.
- Email Address ***: A text input field containing 'aland@docmagic.com'.
- Access Code ***: A text input field containing '0000' with a question mark icon.

Below the input fields is a dashed box containing the text '+ Add Borrower'. At the bottom of the form are two buttons: 'Back' and 'Next'.

- Enter the borrower's information. Fields marked with an asterisk (*) are required, including the borrower's First Name, Last Name, Email Address, and Access Code.
- The access code must be entered by the borrower before they can access their eSign documents.
- Ensure the borrower's name matches the name that appears on the loan documents whenever possible, as this helps AutoPrep correctly assign tags during processing.
- If the transaction includes additional borrowers, click Add Borrower and enter the required information for each borrower.

Creating a New Package From AutoPrep

The screenshot shows the 'Other Signers Details' form within the AutoPrep interface. The form is titled 'Other Signers Details' and includes a help icon. It is divided into two main sections: 'SETTLEMENT AGENT (REQUIRED)' and 'ORIGINATOR'. The 'SETTLEMENT AGENT' section contains fields for First Name (filled with 'BYRON'), Middle Name, Last Name (filled with 'SETTLEMENT'), Suffix, Email Address (filled with 'aland@docmagic.com'), and Access Code (filled with '0000'). The 'ORIGINATOR' section contains fields for First Name, Middle Name, Last Name, and Suffix. At the bottom of the form are 'Back' and 'Next' buttons. The AutoPrep logo and a user profile icon are visible in the top header.

AutoPrep

AD

Other Signers Details

SETTLEMENT AGENT (REQUIRED)

First Name * Middle Name Last Name * Suffix

BYRON SETTLEMENT

Email Address * Access Code *

aland@docmagic.com 0000

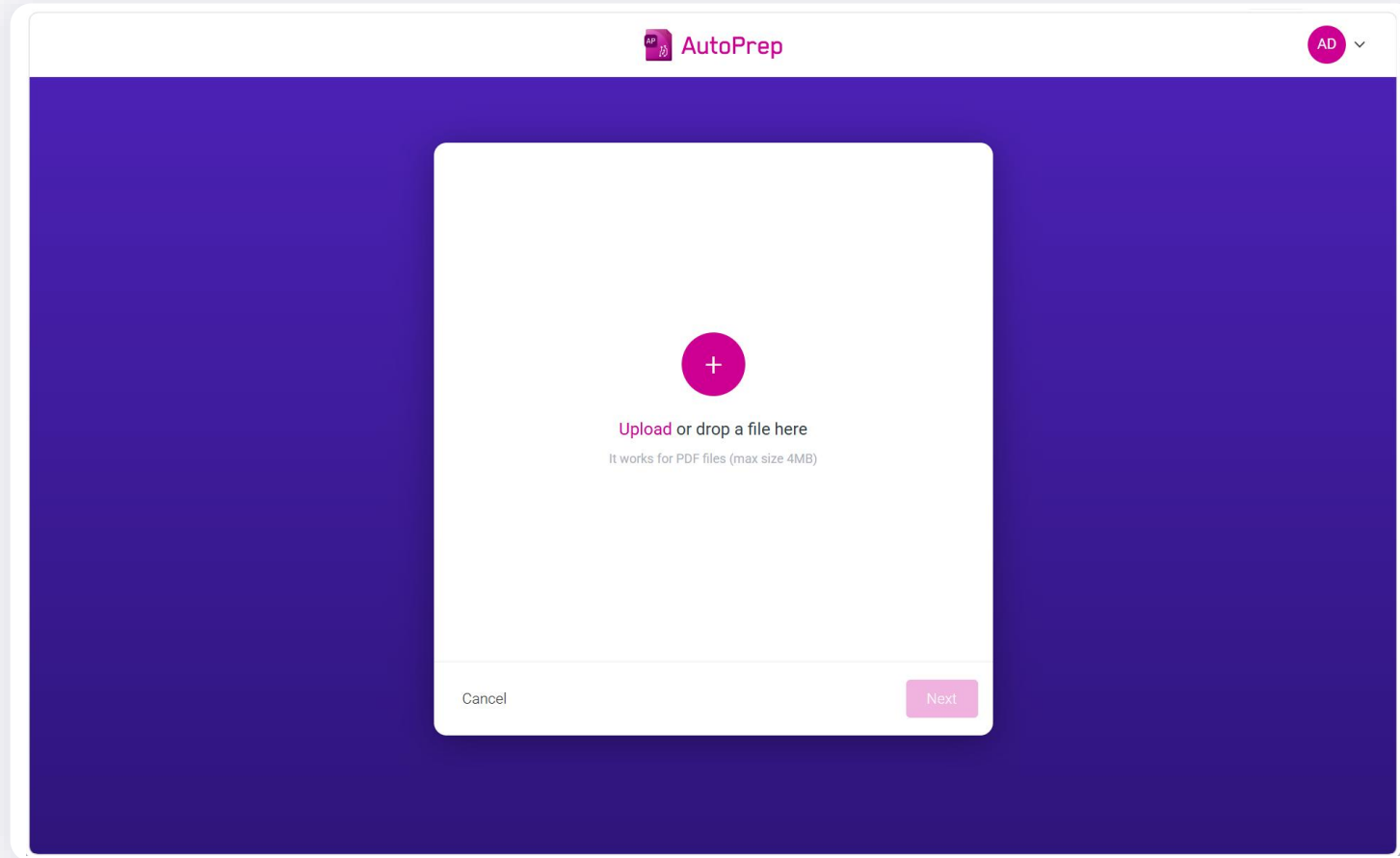
ORIGINATOR

First Name * Middle Name Last Name * Suffix

Back Next

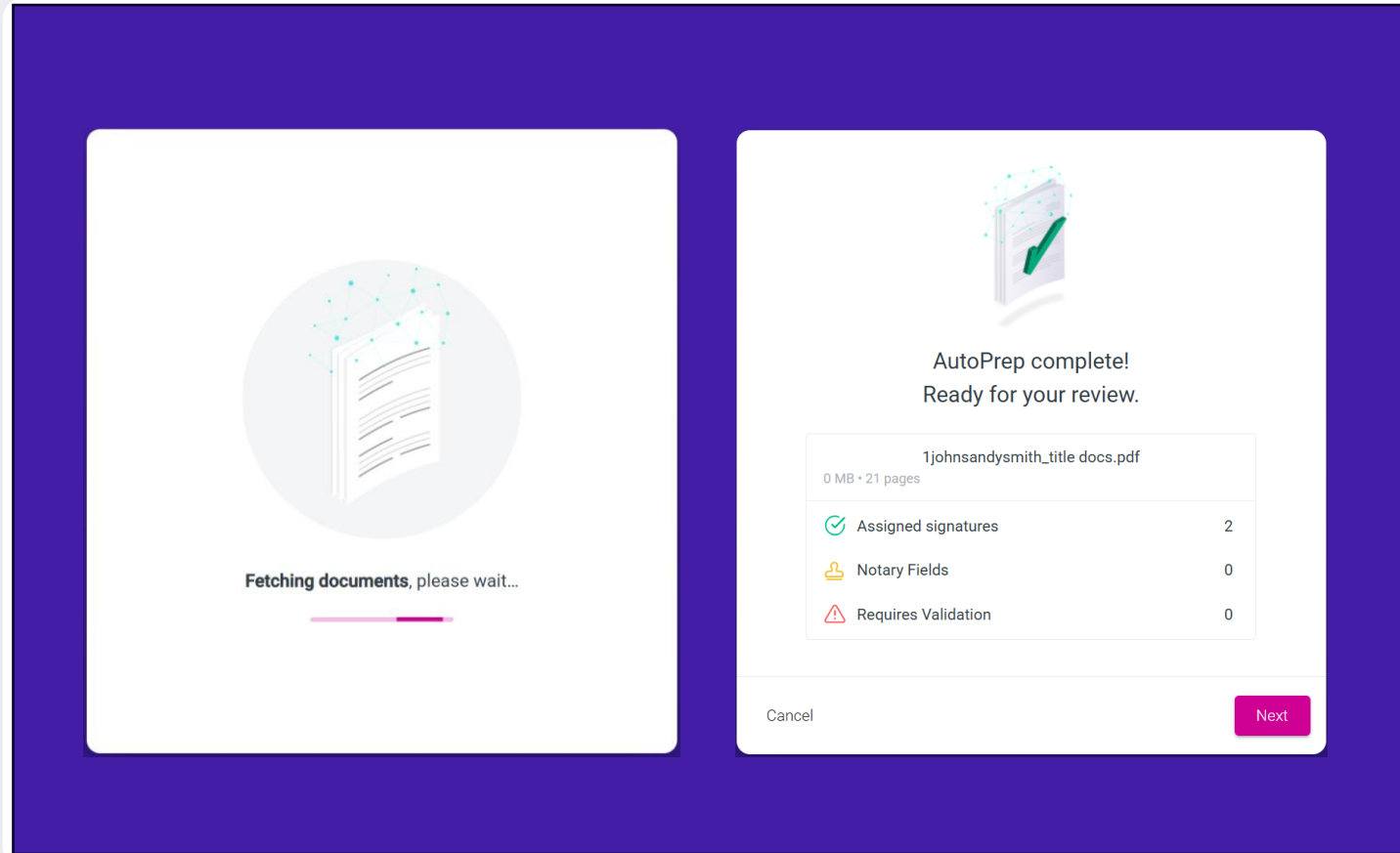
- Next, enter the Settlement Agent's information. A Settlement Agent is required for every AutoPrep transaction and must be entered before proceeding.
- Optional: Enter information for the Loan Originator and Underwriter if they will participate in the eSign transaction. Additional participants should only be added when they are expected to receive or interact with the package.

Creating a New Package From AutoPrep



- Select a document from your computer to upload.

Creating a New Package From AutoPrep



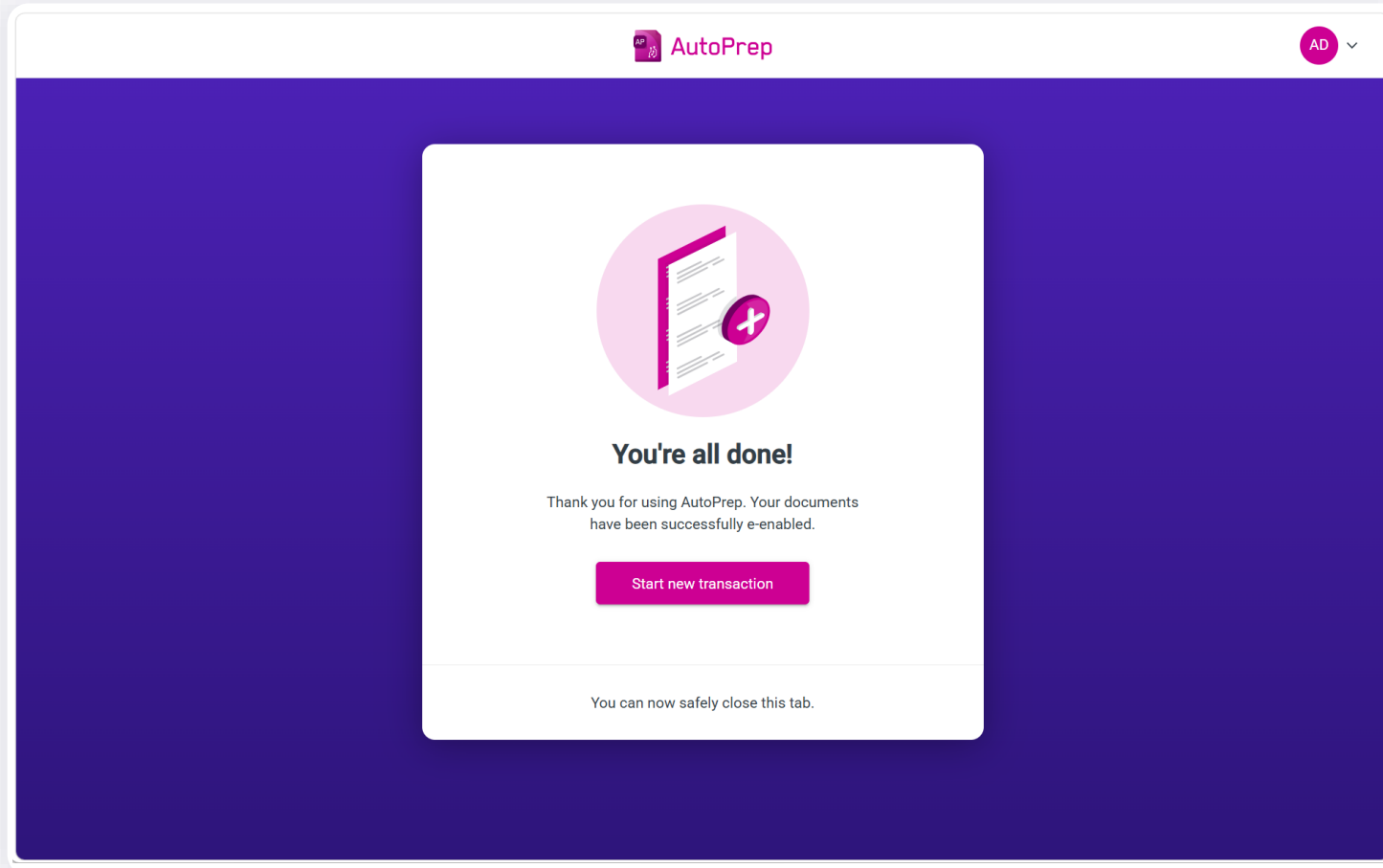
- AutoPrep scans the uploaded document and compares its contents against the participant information entered earlier in the transaction.
- Using this information, it automatically identifies and assigns signature, initial, and notary tags to the appropriate participants.
- Once processing is complete, a summary of the results is displayed, and you will be prompted to click Next.

Creating a New Package From AutoPrep

The screenshot displays the AutoPrep Document Editor interface. At the top, the 'AutoPrep' logo is on the left, and a user profile icon with 'AD' is on the right. Below the logo, the document title '1johnsandysmith_title docs.pdf' is shown, along with the instruction 'Prepare documents for signing.' and a 'Done' button. The main area shows a PDF document titled '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', and 'Property Address: 1234 MAIN STREET, TORRANCE, CALIFORNIA 90501'. Below this, there is a section for joint credit application with signature lines for 'Borrower John Smith' and 'Co-Borrower Sandy Smith'. A sidebar on the left shows a thumbnail of the document with a green checkmark and a red '5' in a circle. A right-hand menu contains options: 'Signature & Initials', 'PostFill', and 'Notary'. A 'Done' button is also visible in the top right corner of the document area.

- You will be taken to the [Document Editor](#), where you can review AutoPrep's results and make any necessary adjustments.
- If no changes are needed, click Done in the upper-right corner.

Creating a New Package From AutoPrep



- You will see this message indicating that your documents have been successfully e-enabled. You can either close the AutoPrep tab or begin a new transaction.

Creating a New Package From AutoPrep

DocMagic Test Lender - Preview your closing documents

 donotreply@docmagic.com
To: Alan Dai

  Reply  Reply All  Forward  

Wed 8/12/2026 2:30 PM

John Smith,

Your closing documents are ready for review. Please click the link below to preview your closing document package.

[Click here to review](#)

Please note: You will receive a second email the morning of your closing at which time your documents will be ready for your electronic signature.

Have a great closing!

DocMagic Test Lender

 donotreply@docmagic.com
To: Alan Dai

  Reply  Reply All  Forward  

Wed 8/12/2026 2:30 PM

Dear Byron Settlement,

This is your invitation to provide settlement services for a secure eClosing for DocMagic Test Lender. Simply login to the Closing Agent Portal where you can upload and review the Closing Document package prior to the eClosing.

[Click here to access the Closing Agent Portal](#)

Primary Borrower: JOHN SMITH
Loan Number: XXXXXXXXXX1111

Please take the opportunity to review the Agent Portal Tutorial on our training page [here](#).

If you have questions about this process, [click here](#) to visit our online support system.

Regards,

- Seeing this confirmation also indicates that email notifications have been sent to the appropriate participants, inviting them to view or sign their documents.
- Borrowers will not be able to sign AutoPrep-enabled documents before the scheduled Closing Date.
- However, they will still receive email notifications and may access and review their documents prior to closing, just as they would with a standard closing package generated through DocMagic Online or an integrated LOS.

Creating a New Package From AutoPrep

eSign Console - Alan Dai

SchedulerMonitoringAccounts**eSign Requests**Create RequestSearchAccount

Active RequestsShowing 1 - 7 of 7

1Show: 50

Loan # Document Set	Signer Email	Status Worksheet #	Ver	Created	CS	IS	RESPA	PDF	Archive
★ 77781220261111 Closing Documents	John Smith (+2) aland@docmagic.com	New	1	8/12/26 2:29 PM	✓		⊖	📄	🗄️
⚙️ 777081120260003 Closing Documents	John Smith (+4) aland@docmagic.com	In Progress 6	1	8/12/26 11:23 AM	✓		⊖	📄	🗄️
📄 777081120260003 Closing Documents	John Smith (+2) aland@docmagic.com	Signed 5	1	8/12/26 11:10 AM	✓	✓	⊖	📄	🗄️

Loan #: 77781220261111

Primary Name: John Smith

Type: EClosing

Package Id: 1684622

Worksheet #: (Version : 1)

Closing Date: 8/18/26

Lender: Alan Dai

DocMagic Test Lender (100TRAINING)

aland@docmagic.com

(800)649-1362

Status: New (Active)

Documents: 1 (21 total pages)

Signers: 3

Expires: N/A (Requires: Primary)

Signatures: Y

DetailsDocumentsDocuments ReceivedEMailsVersions

📄📄👤🖨️🔄🗄️

Documents+🔧

Document Name	ClickSign	Page(s)	Mark(s)	Signer(s)	Completed	Sigreq Document Id Document Id	Filename	Delete	Operation
1 Closing_Documents_AP_2026-08-12_14:14:5	✓	21	6	2		10016768 10040084	1johnsandysmith_title docs.pdf		

Add Internal Note

Cancel Request

Delete Request

- Just like any other eSign enabled package, your recently e-enabled document will appear at the top of your [eSign Console](#).