

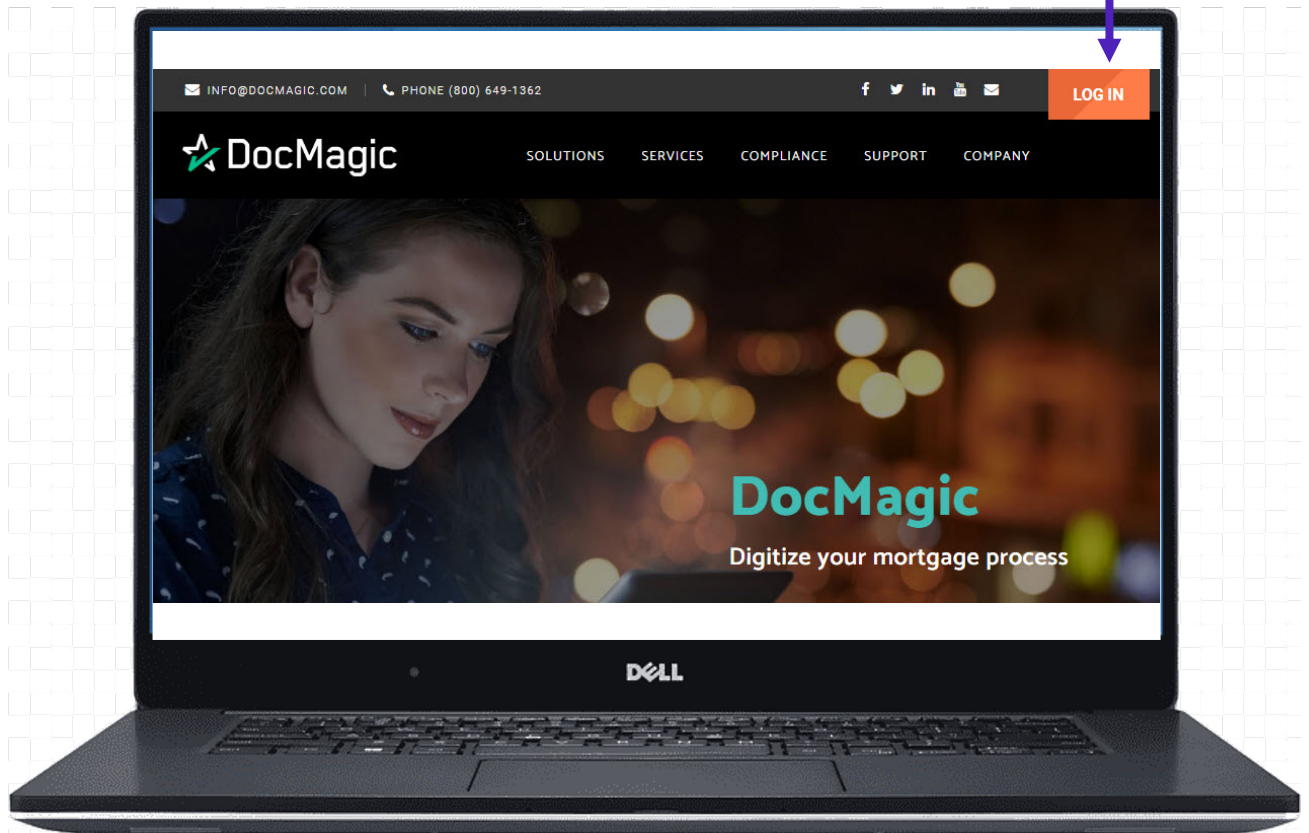


Processing a document set
through AutoPrep with eNote

AutoPrep with eNote

Login

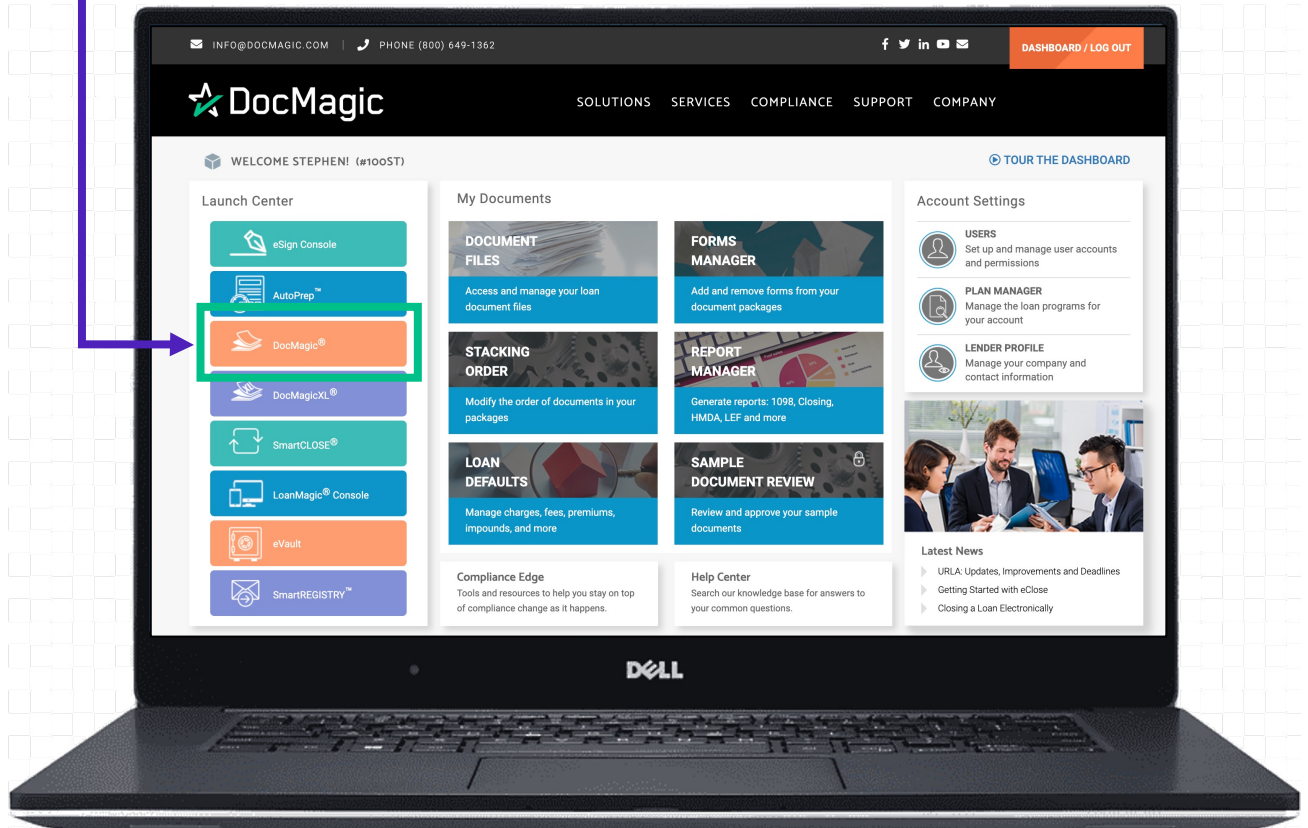
Log in to www.docmagic.com



DocMagic Online

Start with the eNote

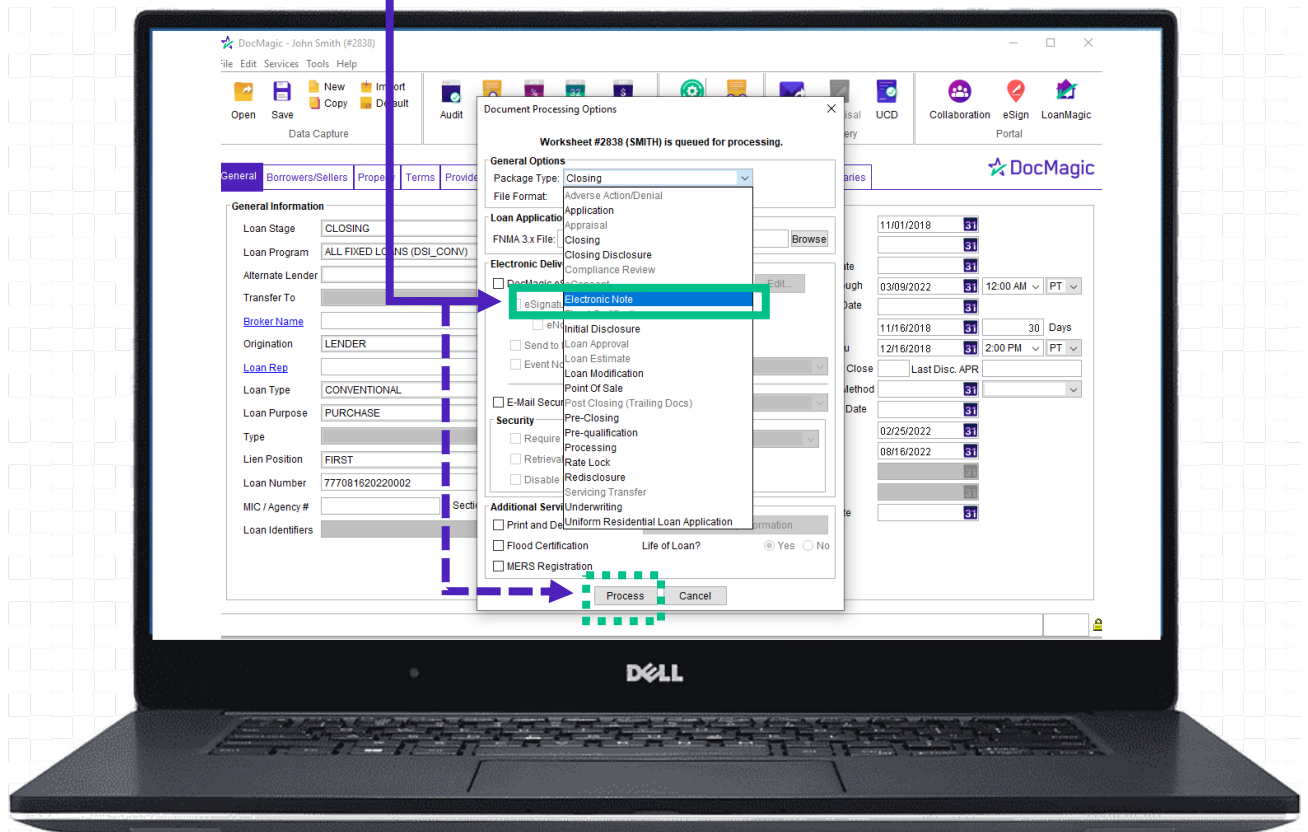
To begin the process of generating an eNote, open DocMagic (Online)



DocMagic Online

Generate the eNote

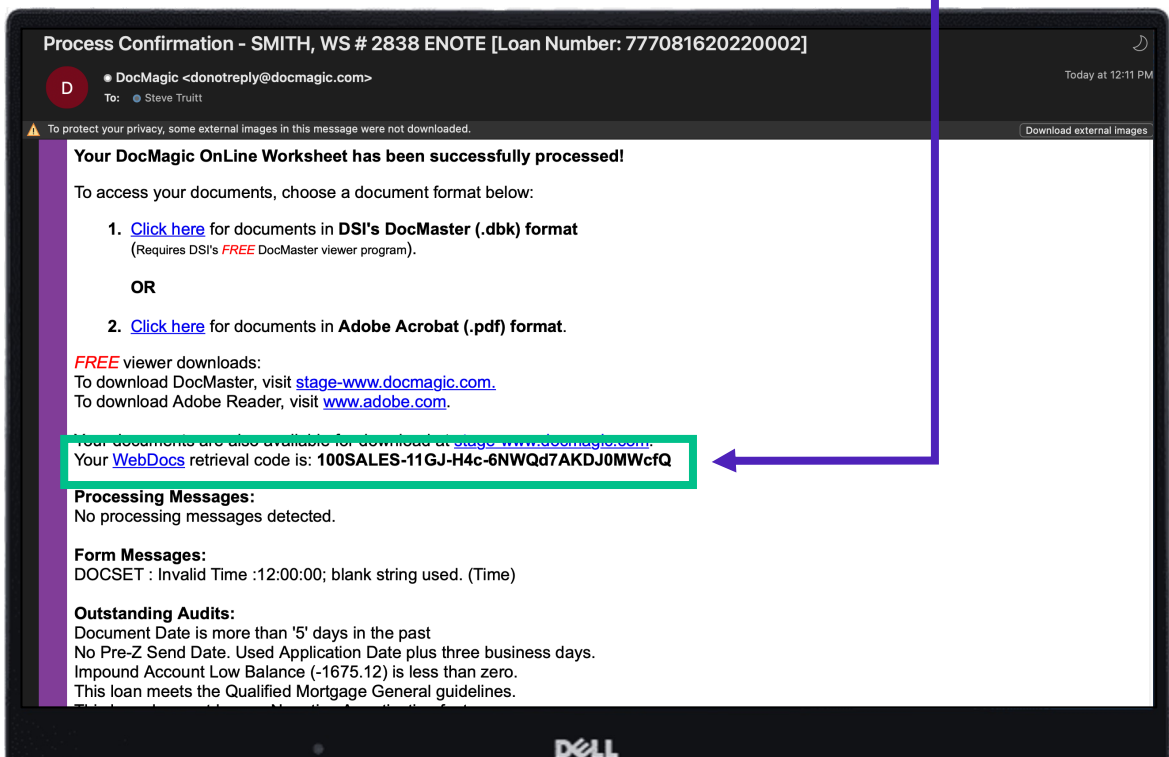
Process the eNote from your loan file



Process Confirmation

Grab the WebDocs Code

You will receive a confirmation email including a WebDocs retrieval code for the eNote.

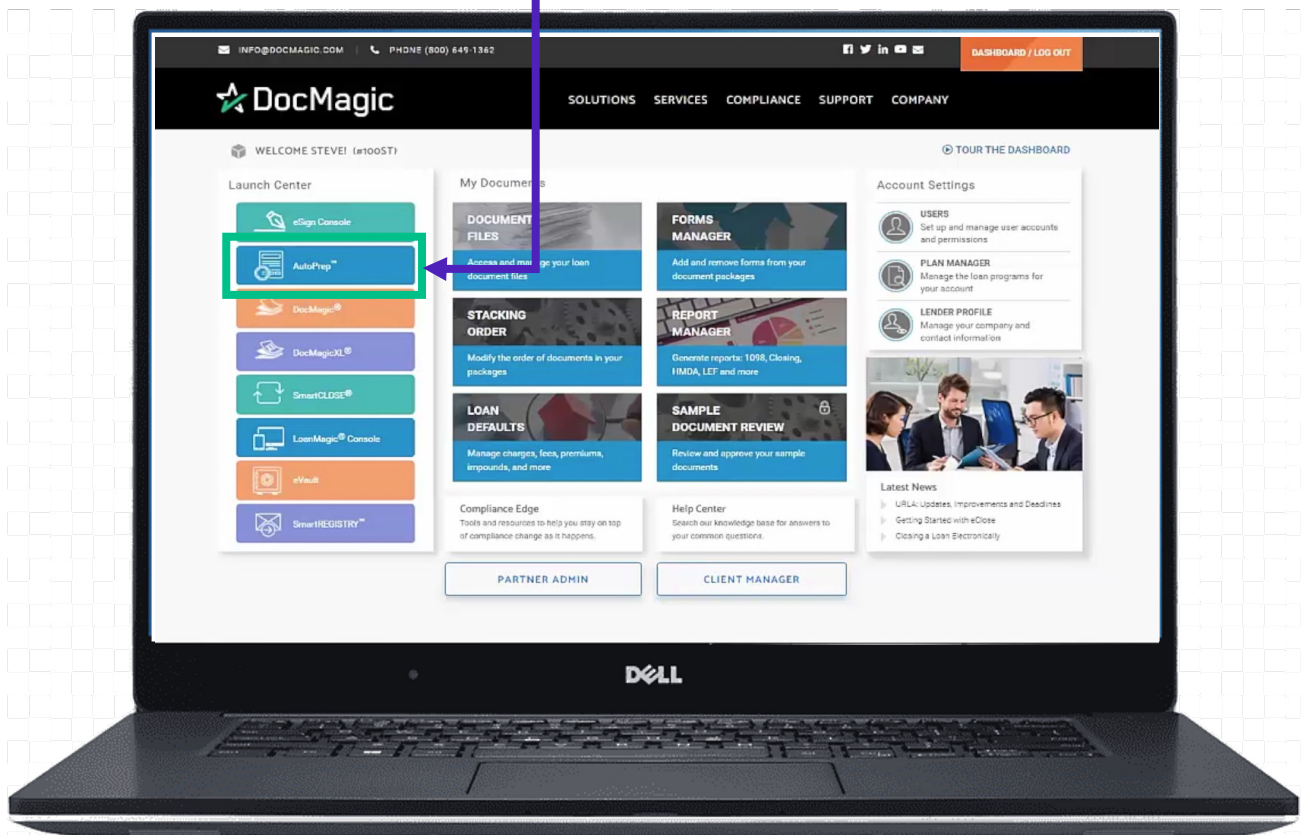


Copy this code. You will need it when you upload documents to AutoPrep.



Engage AutoPrep

Back on the Dashboard and Choose AutoPrep from the Launch Center.



Filling in the Details

Enter the necessary information including Loan number, WebDocs Code and closing details

1

Transaction Details

Loan Number
777081620220003

Include eNote? ☒ Yes ☐ No

WebDocs Code
100SALES-10GJ-H9c-4NWQd7AKED0MWcf

eNotary Enable? ☐ Yes ☒ No

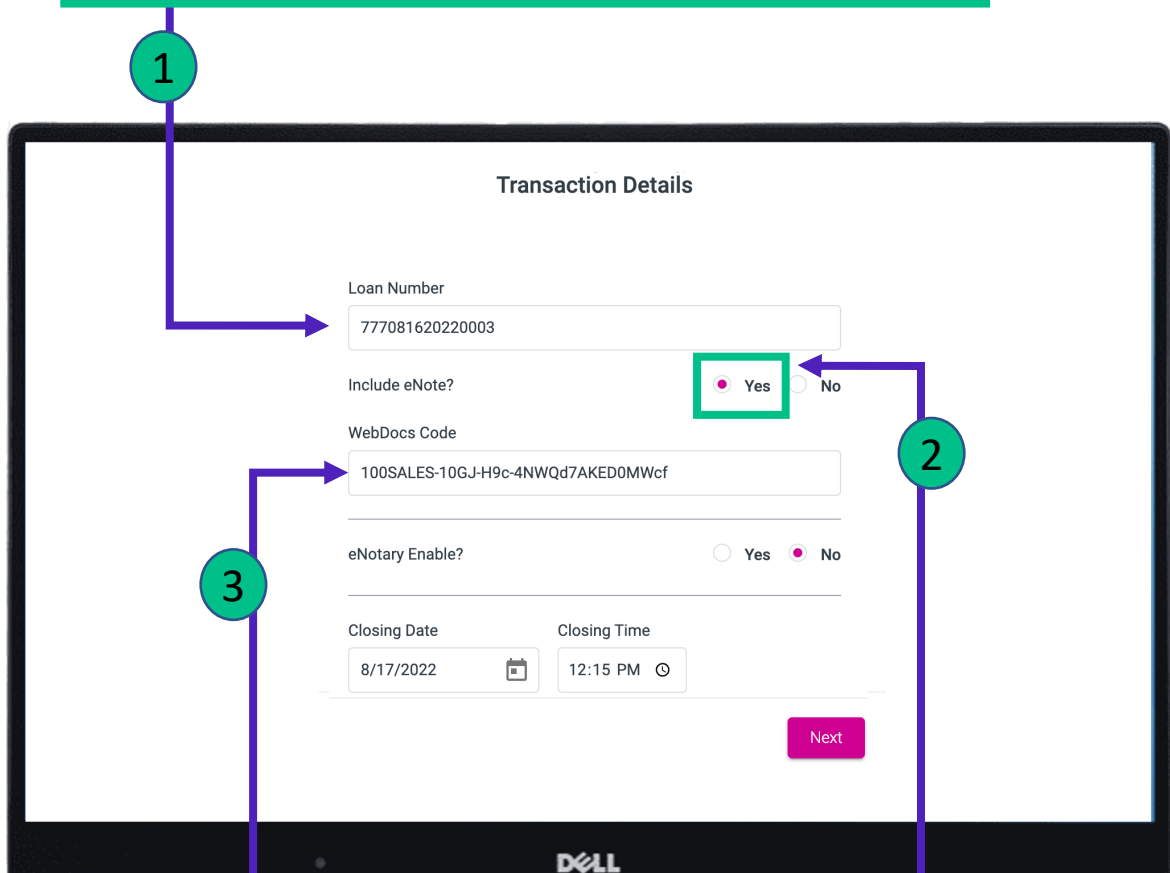
Closing Date
8/17/2022

Closing Time
12:15 PM

Next

2

3



Make sure you check here to include and input the eNote.



Which Hybrid?

Hybrid 2

Select "Yes" or "No" for Including the eNotary

Transaction Details

Loan Number

Include eNote? ☒ Yes ☐ No

WebDocs Code

eNotary Enable? ☒ Yes ☐ No

Closing Date

Back Next

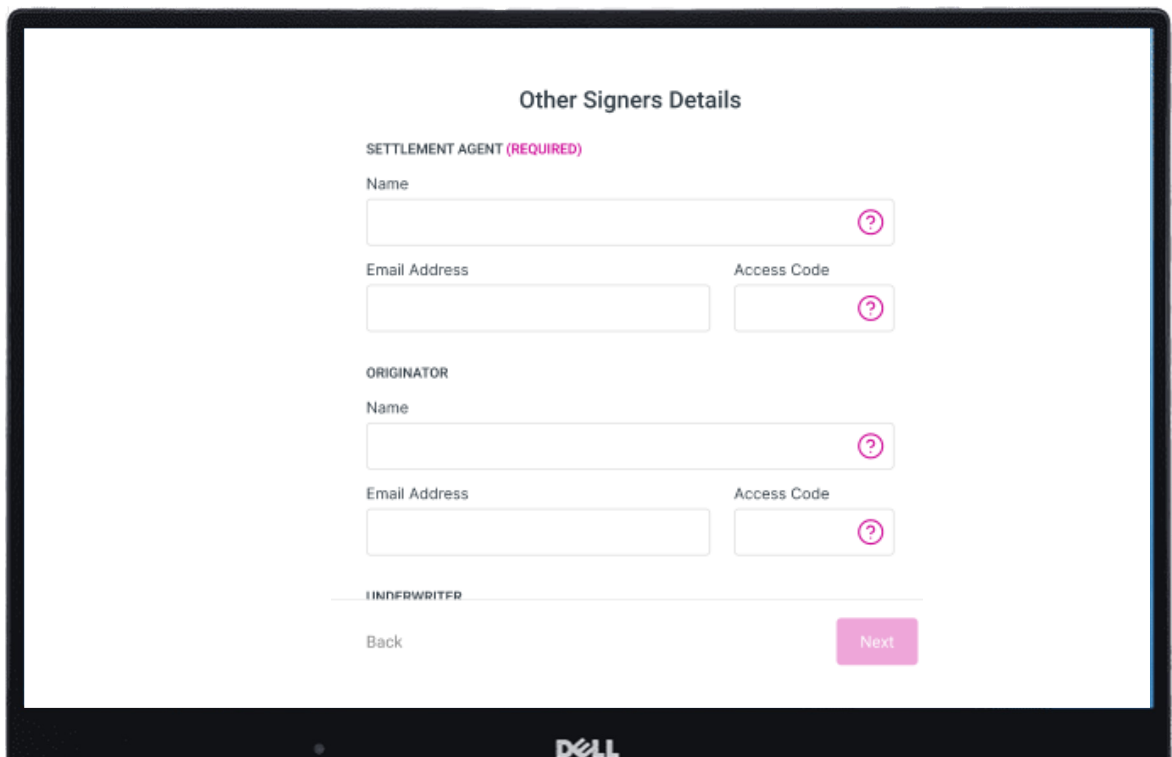
Enter the Closing Date



Additional Information

Participants

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



The screenshot shows a Dell monitor displaying a web form titled "Other Signers Details". The form is divided into three sections: "SETTLEMENT AGENT (REQUIRED)", "ORIGINATOR", and "UNDERWRITER". Each section has a "Name" field and an "Email Address" field. The "SETTLEMENT AGENT" section also has an "Access Code" field. Each field has a pink question mark icon to its right. At the bottom of the form, there are "Back" and "Next" buttons. The Dell logo is visible on the bottom bezel of the monitor.

Other Signers Details

SETTLEMENT AGENT (REQUIRED)

Name ?

Email Address Access Code ?

ORIGINATOR

Name ?

Email Address Access Code ?

UNDERWRITER

Back

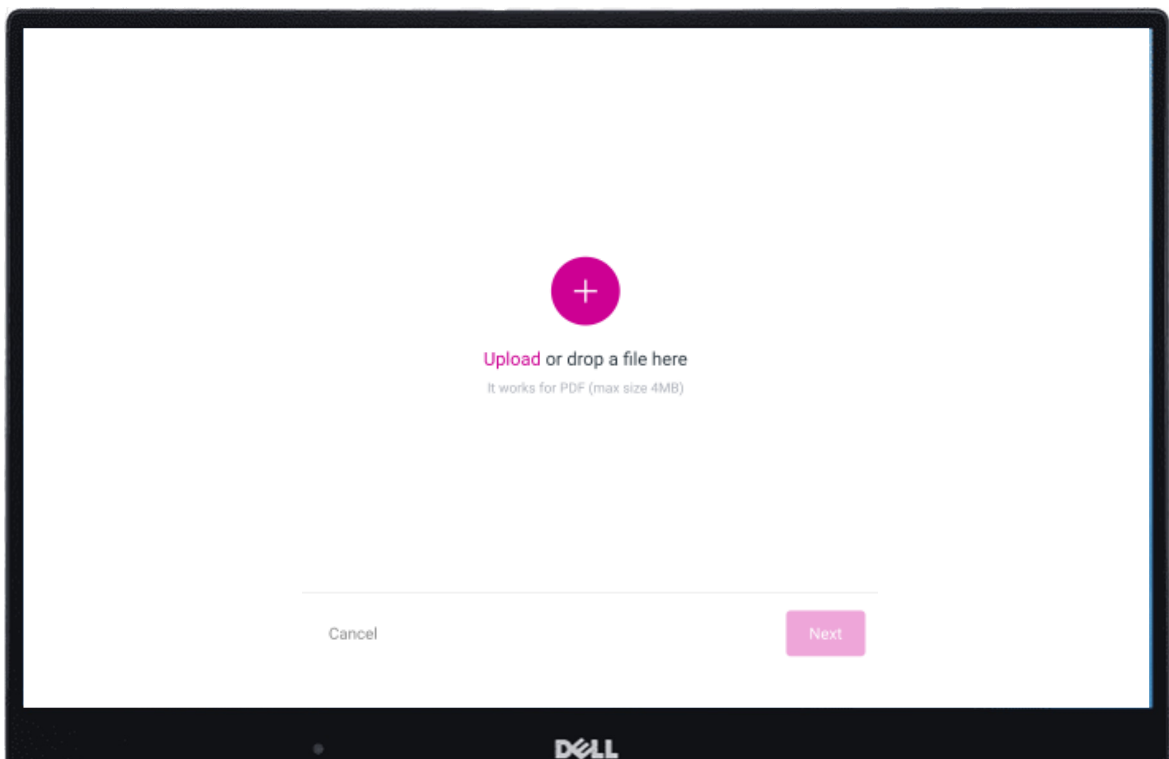
Borrower information needs to be entered EXACTLY as it appears in the document.



Choose Your Document Set

Uploading a File

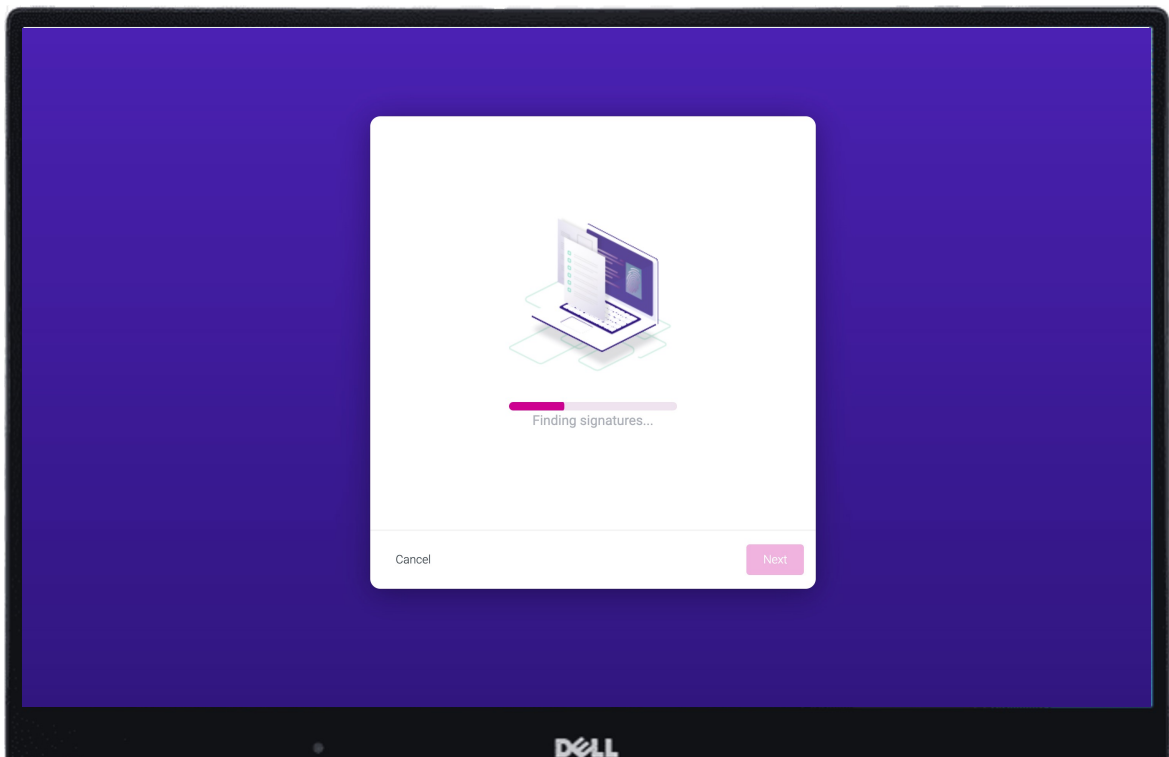
Upload a PDF that you wish to prepare.



Reading the Documents

Uploading a File

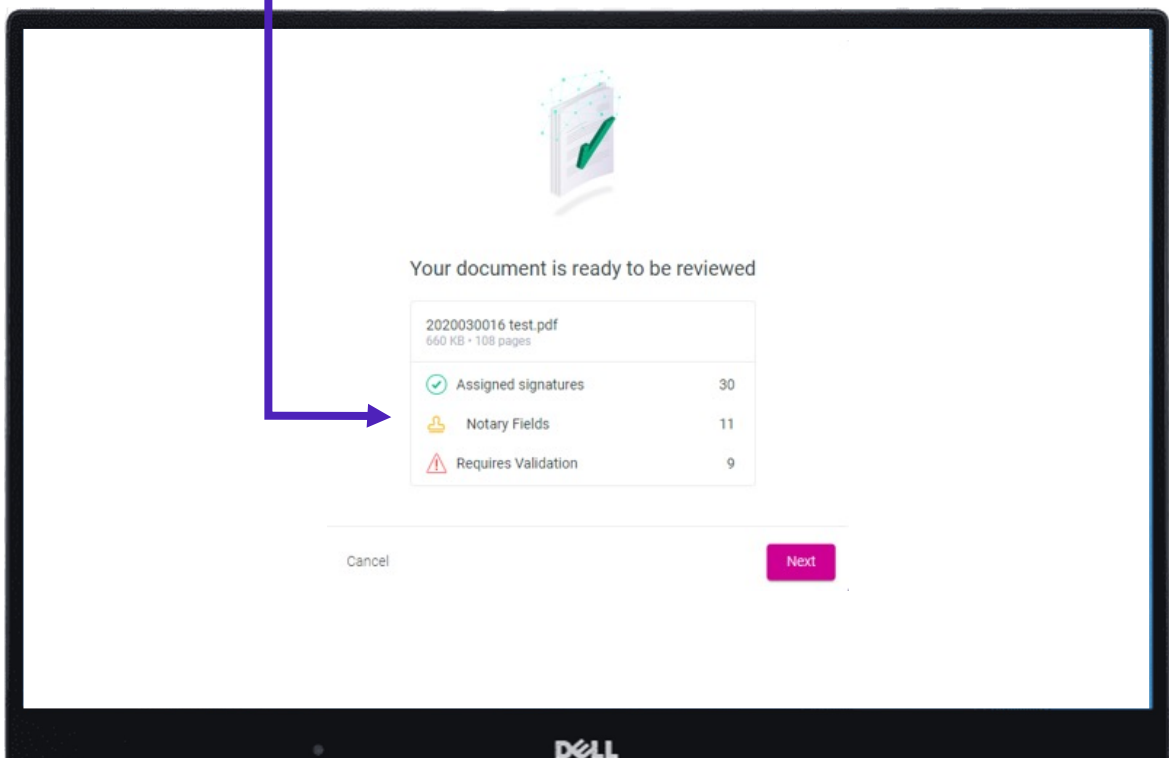
AutoPrep will use Optical Character Recognition (OCR) and A.I. to identify signatures lines for Borrowers well as other participants such as Notaries.



Auto-tagged Sections

Document Pre-Review

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



Good and Bad Tags

Green and Red

Green means that the signature line has been identified to match a previously entered borrower/signer

The screenshot shows a Dell monitor displaying the AutoPrep interface. The document is titled 'samsandysmith_closing package_hw annual.pdf' (page 2 of 24). The form is titled 'EVIDENCE OF JOINT APPLICATION' and includes fields for Date (APRIL 5, 2016), Provided By (White House Bank), Borrower (Sam Smith, Sandy Smith), and Property Address (1234 MAIN STREET, TORRANCE, CALIFORNIA 90501). Below the form, there is a section for joint credit application with two signature lines. The first signature line is for 'Borrower Sam Smith' and has a red tag. The second signature line is for 'Sandy Smith (Borrower 1)' and has a green tag. On the right side of the screen, there are two circular icons: a green one with a checkmark and a red one with a warning triangle. A blue arrow points from the text box above to the green tag on the signature line. Another blue arrow points from the text box below to the red tag on the signature line.

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

Red fields MUST be verified before sending the document to proceed with eSign



Blue and Green

The borrower will be highlighted in green

DocMagic

2020030016 test.pdf

The undersigned Borrower(s) do hereby so agree and covenant in order to assure that this loan documentation executed this date will perform and be acceptable in the marketplace in the instance of transfer, sale or conveyance by Lender of its interest in and to the loan documentation, and to assure marketable title in the said Borrower(s).

DATED this 24th day of April, 2020.

Terry M Mackey (Borrower 1)

- BORROWER - Terry M Mackey - DATE -

State of _____

County of _____

This instrument was acknowledged before me on _____ by Terry M Mackey.

Notary
Notary Public

My Commission Expires: _____

+

Blue indicates a field that needs to be filled out via text/signature



Using the Toolbox

Extra Signatures, postfill, Notary, etc.

The screenshot shows the AutoPrep software interface. At the top, the document title is 'samsandysmith_closing package_hw annual.pdf' and the page number is 'page 2 of 24'. The document content is titled 'EVIDENCE OF JOINT APPLICATION' and includes the following information:

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

Below this information, there is a signature line with the text: 'If you are applying for joint credit with another person, please sign below. We intend to apply for joint credit.' The signature line has a plus icon for adding more signatures. A toolbox on the right side of the screen contains the following options:

- Signature Fields
- Notary Fields
- PostFill

A 'Done' button is located at the top right of the screen. A green checkmark icon is visible in the top right corner of the document area.

A user can fill out blank fields by clicking the plus.

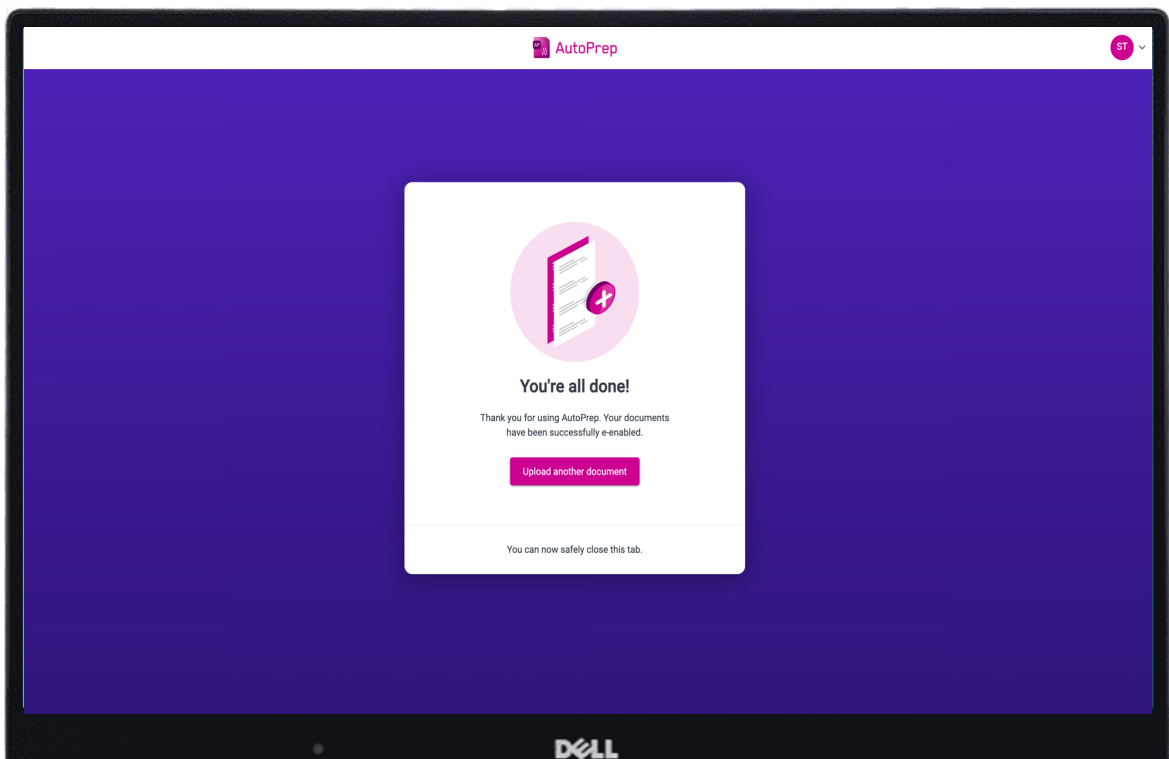
This opens the toolbox. From here, blank fields can be populated with signature lines, initials, checkboxes, dates, and notary texts.

Click Done when complete.



Confirmed

This confirmation let's you know you can now work from your eSign console.



eSign Console Confirmation

The AutoPrep- prepared loan will now be listed in your eSign console on your Dashboard.

The screenshot displays the eSign Console interface for Steve Truitt. The top navigation bar includes links for Scheduler, Monitoring, Accounts, eSign Requests, and Create Request. The main section is titled "Active Requests Showing 1 - 50 of 92". A table lists active requests with columns for Loan #, Document Set, Signer, Status, Worksheet #, Ver, Created, CS, IS, RESPA, and P. The first request is Loan # 081620220004, Document Set Closing Documents, Signer Sandy Smith (+4), Status New, Worksheet # 2843, Ver 1, Created 8/16/22 12:31 PM, CS checked, IS checked, RESPA checked, and P checked. The second request is Loan # 77708161207, Document Set Closing Documents, Signer John Smith (+4), Status In Progress, Worksheet # 2840, Ver 1, Created 8/16/22 10:23 AM, CS checked, IS checked, RESPA checked, and P checked. The third request is Loan # 777081620220002, Document Set Closing Documents, Signer John Smith (+2), Status New, Worksheet # 2840, Ver 1, Created 8/16/22 10:23 AM, CS checked, IS checked, RESPA checked, and P checked. A modal window titled "eSign Console - Steve Truitt" is open, showing details for Loan # 081620220004. The modal includes fields for Primary Name (Sandy Smith), Type (EClosing), Package Id (578816), Worksheet # (2843 (Version : 1)), and Closing Date (8/17/22). It also lists the Lender (Steve Truitt) and contact information (DSI TEST LENDER (SALES) (100SALES), struitt@docmagic.com, (800)649-1362). The modal has tabs for Details, Documents, Documents Received, Emails, and Versions. The Documents tab is selected, showing a table of documents with columns for Document Name, ClickSign, Page(s), Mark(s), Signer(s), Completed, and Sigreq Document Id | Document Id. The first document is Closing Documents_AP_2022-08-16_12:24:45, ClickSign checked, Page(s) 24, Mark(s) 4, Signer(s) 1, Completed checked, and Sigreq Document Id | Document Id 5038478 | 5047977. The second document is Multistate Fixed Rate Electronic Note, ClickSign checked, Page(s) 4, Mark(s) 1, Signer(s) 1, Completed checked, and Sigreq Document Id | Document Id 5038479 | 5047978. There is an "Add Internal Note" button. The bottom of the screenshot shows a Dell logo.

Loan #	Document Set	Signer	Status	Worksheet #	Ver	Created	CS	IS	RESPA	P
081620220004	Closing Documents	Sandy Smith (+4) struitt@docmagic.com	New	2843	1	8/16/22 12:31 PM	✓	✓	✓	✓
77708161207	Closing Documents	John Smith (+4) struitt@docmagic.com	In Progress	2840	1	8/16/22 10:23 AM	✓	✓	✓	✓
777081620220002	Closing Documents	John Smith (+2)	New	2840	1	8/16/22 10:23 AM	✓	✓	✓	✓

eSign Console - Steve Truitt

Loan #: 081620220004
Primary Name: Sandy Smith
Type: EClosing
Package Id: 578816
Worksheet #: 2843 (Version : 1)
Closing Date: 8/17/22

Lender: Steve Truitt
DSI TEST LENDER (SALES) (100SALES)
struitt@docmagic.com
(800)649-1362

Details Documents Documents Received Emails Versions

Documents

Document Name	ClickSign	Page(s)	Mark(s)	Signer(s)	Completed	Sigreq Document Id Document Id
1 Closing Documents_AP_2022-08-16_12:24:45	✓	24	4	1	Completed	5038478 5047977
2 Multistate Fixed Rate Electronic Note	✓	4	1	1	Completed	5038479 5047978

Add Internal Note

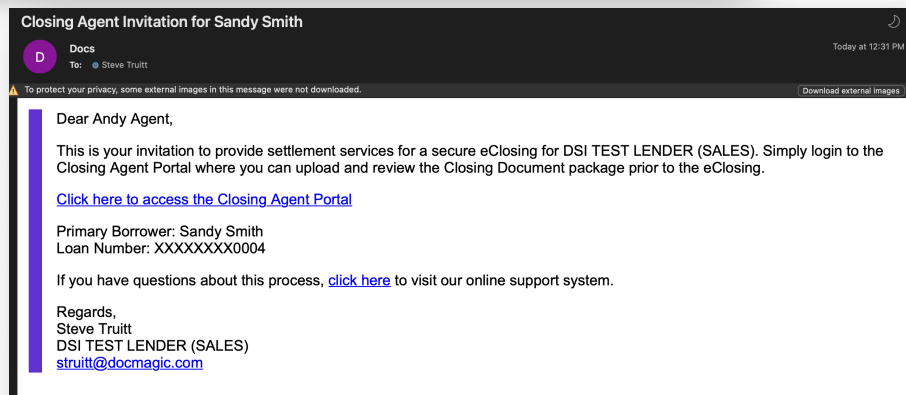
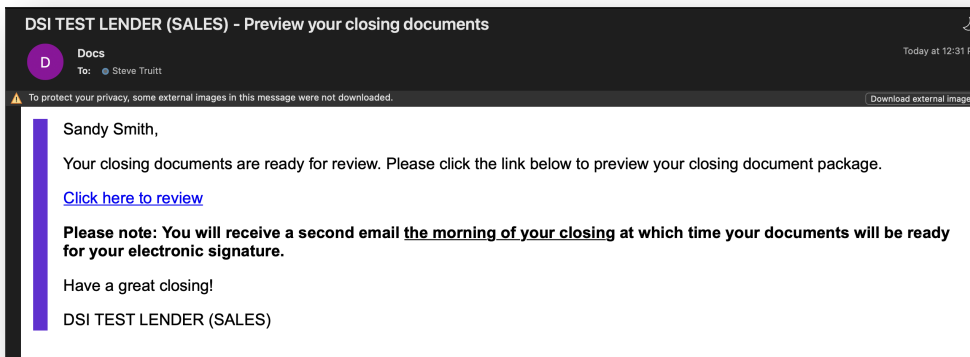
Loan #	Document Set	Signer	Status	Worksheet #	Ver	Created	CS	IS	RESPA	P
081120220001	Initial Disclosure	John Smith (+1) struitt@docmagic.com	Signed	2824	1	8/11/22 12:49 PM	✓	✓	✓	✓
77708110339	Closing Documents	John Smith (+2) Leah@docmagic.com	In Progress	2825	1	8/11/22 12:21 PM	✓	✓	✓	✓
77708101152	Closing Documents	John Smith (+2) ron@docmagic.com	Signed	2823	1	8/10/22 11:58 AM	✓	✓	✓	✓
77708101101	Closing Documents	John Smith (+2)	Signed	2823	2	8/10/22 11:58 AM	✓	✓	✓	✓



Participant Confirmations

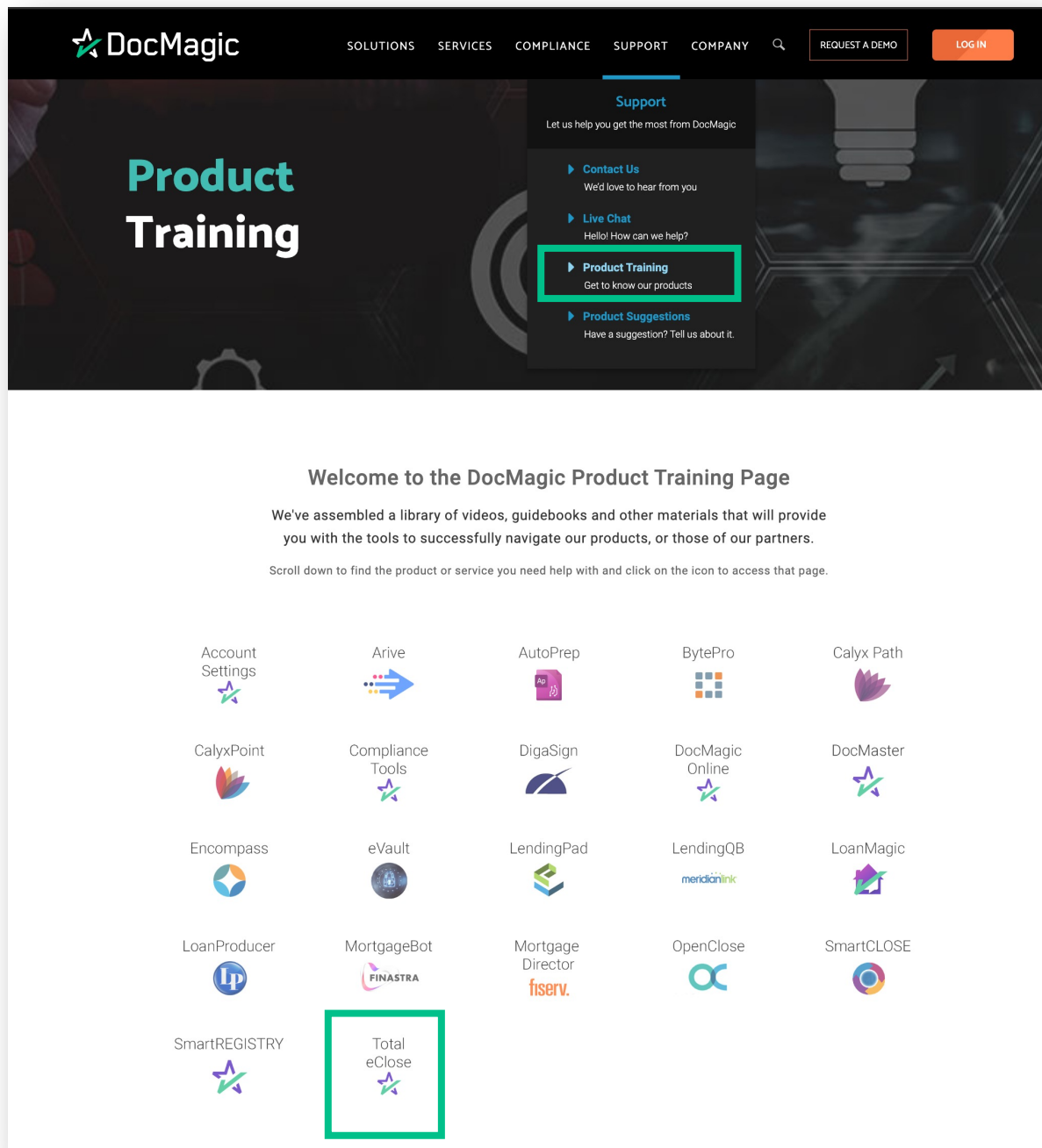
Email Invites

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



Additional Resources

Product Training Page



The screenshot shows the DocMagic website's Product Training page. At the top, the DocMagic logo is on the left, and navigation links for SOLUTIONS, SERVICES, COMPLIANCE, SUPPORT, and COMPANY are in the center. On the right, there are buttons for 'REQUEST A DEMO' and 'LOG IN'. A 'Support' dropdown menu is open, showing options: 'Contact Us', 'Live Chat', 'Product Training' (highlighted with a green border), and 'Product Suggestions'. The main heading 'Product Training' is displayed in large green and white text. Below this, a welcome message states: '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. Scroll down to find the product or service you need help with and click on the icon to access that page.' A grid of 20 product/service icons is shown, including Account Settings, Arive, AutoPrep, BytePro, Calyx Path, CalyxPoint, Compliance Tools, DigaSign, DocMagic Online, DocMaster, Encompass, eVault, LendingPad, LendingQB, LoanMagic, LoanProducer, MortgageBot, Mortgage Director, OpenClose, and SmartCLOSE. The 'Total eClose' icon, which is the DocMagic star logo, is highlighted with a green border in the bottom row.

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.

Scroll down to find the product or service you need help with and click on the icon to access that page.

Account Settings, Arive, AutoPrep, BytePro, Calyx Path, CalyxPoint, Compliance Tools, DigaSign, DocMagic Online, DocMaster, Encompass, eVault, LendingPad, LendingQB, LoanMagic, LoanProducer, MortgageBot, Mortgage Director, OpenClose, SmartCLOSE, Total eClose

For training on eSign for Borrower and the rest of the eSign process, visit our Product Training Page on the dashboard.

