

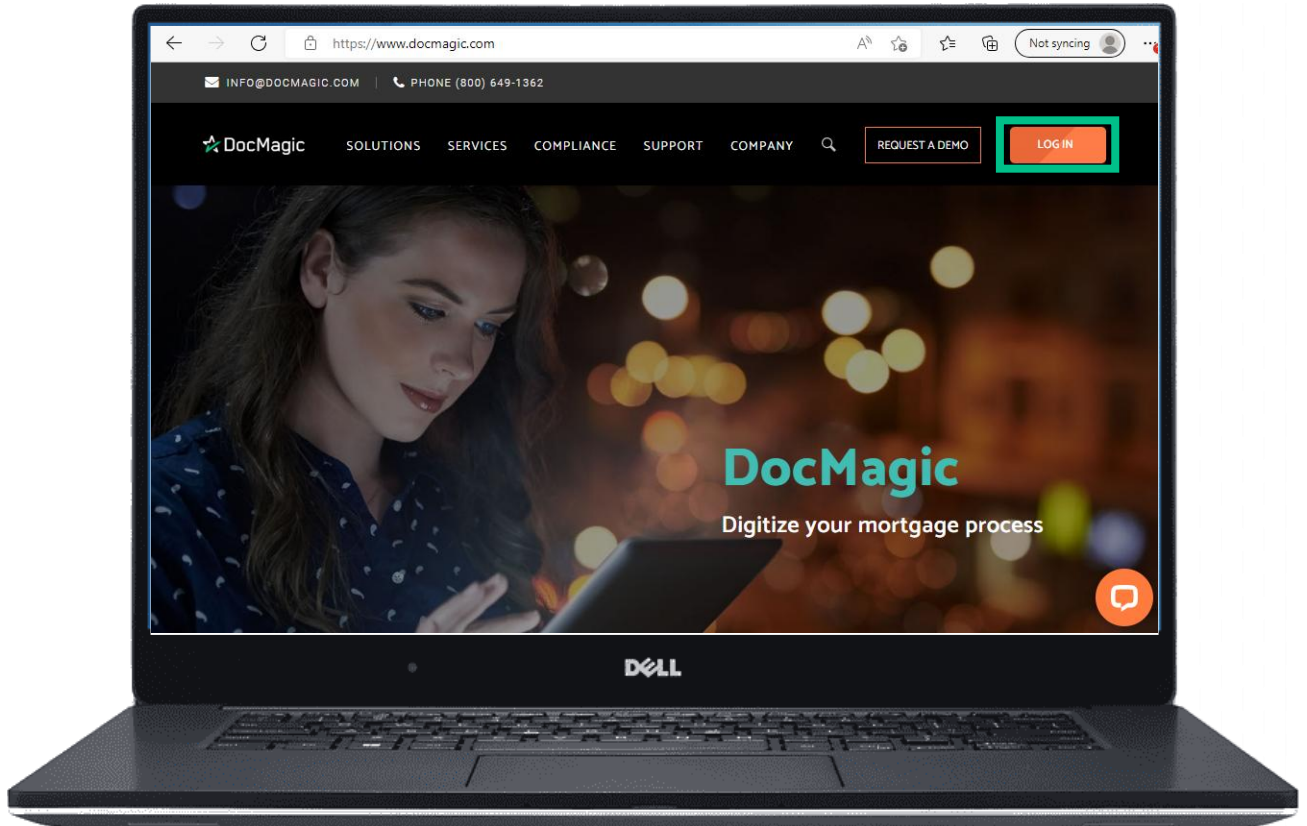


Creating a Custom eSign Request

# Creating a Custom eSign Request

## Getting to the eSign Console

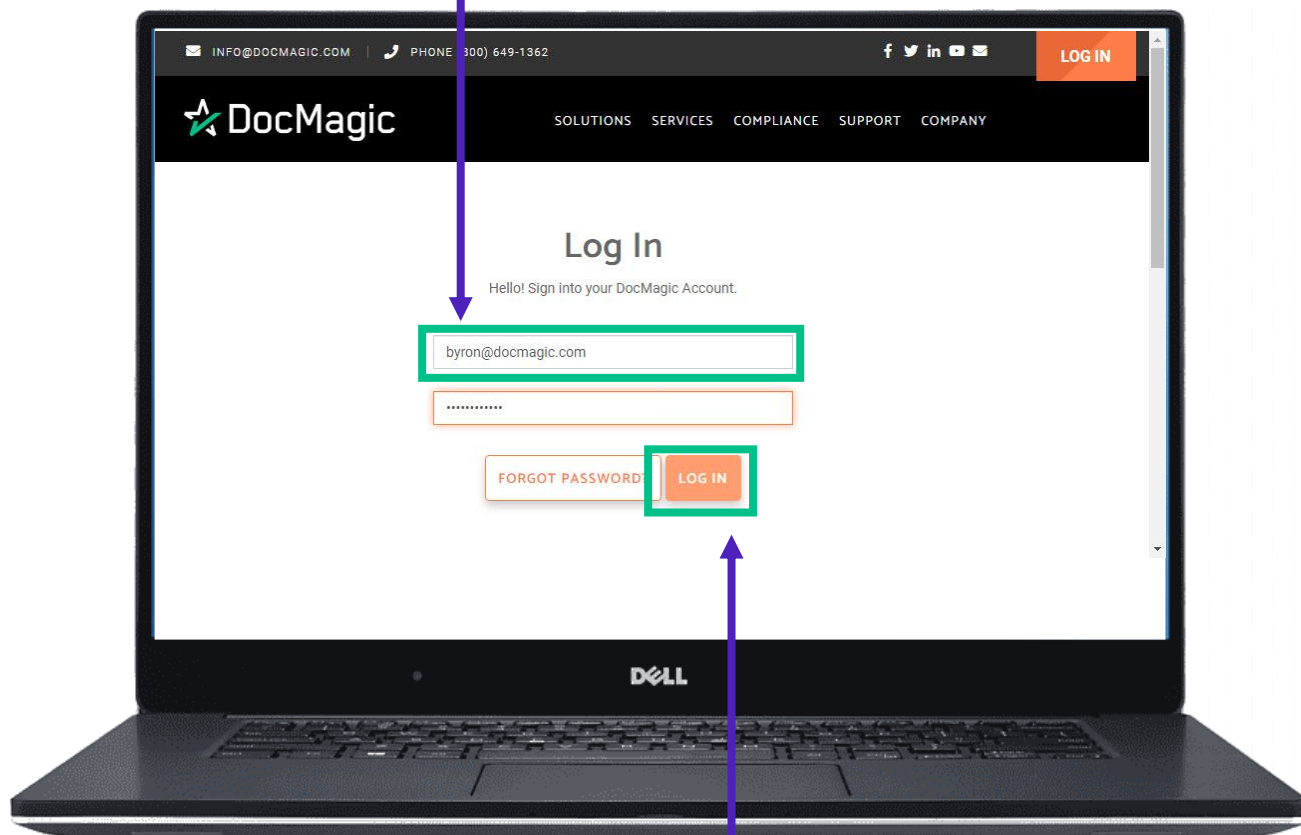
Go to [www.docmagic.com](https://www.docmagic.com)



# Creating a Custom eSign Request

## Getting to the eSign Console

Login with your  
email and  
password.



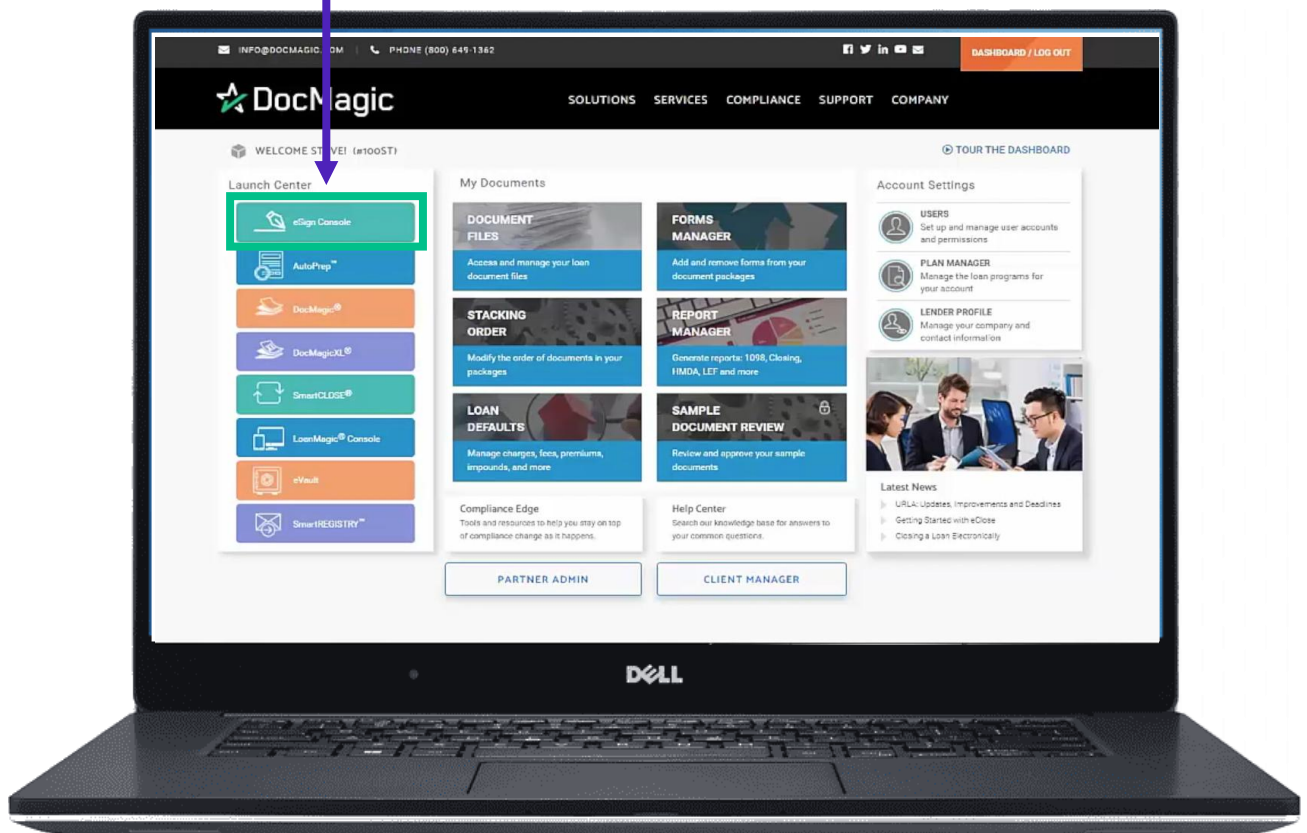
Click "LOG IN"



# Creating a Custom eSign Request

## Getting to the eSign Console

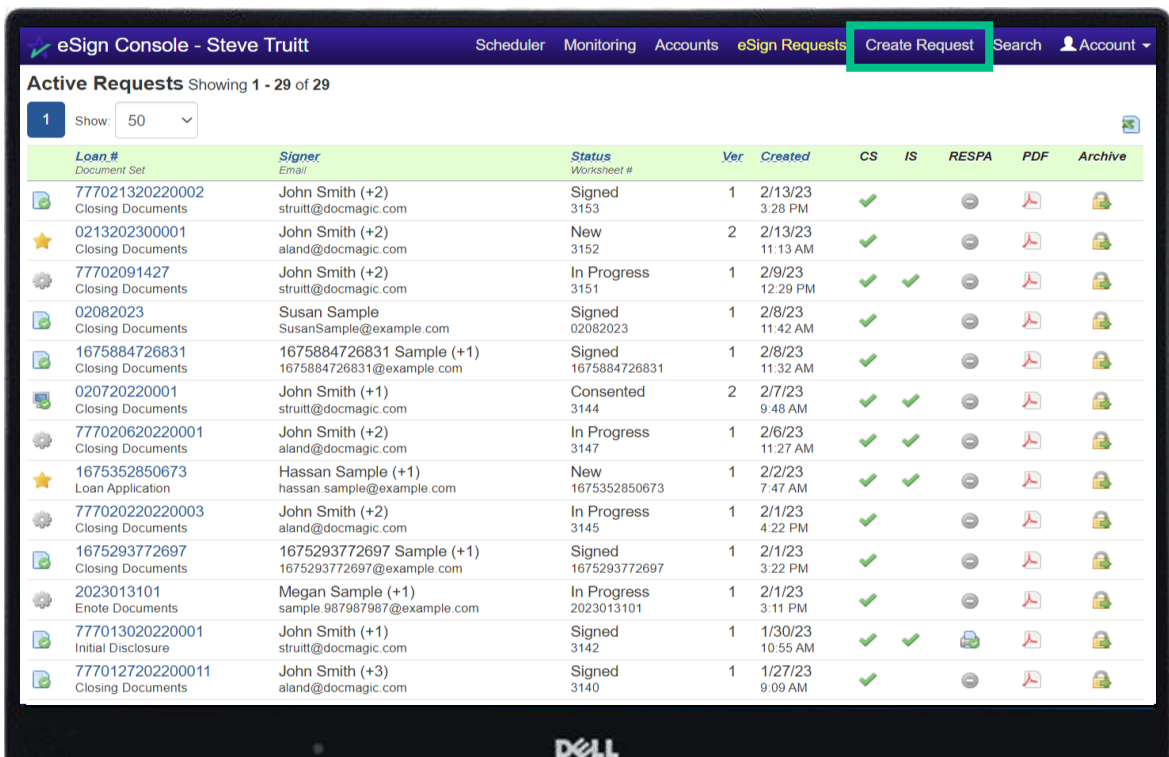
Select eSign Console  
from the dashboard.



# Creating a Custom eSign Request

eSign Console

Click "Create Request" in the top right of the eSign Console to start a new application.



The screenshot displays the eSign Console interface for Steve Truitt. The top navigation bar includes links for Scheduler, Monitoring, Accounts, eSign Requests, and a highlighted 'Create Request' button. Below the navigation bar, the 'Active Requests' section shows a list of 29 requests. The table below provides a detailed view of these requests, including their status, version, creation date, and various document types.

Loan # Document Set	Signer Email	Status Worksheet #	Ver	Created	CS	IS	RESPA	PDF	Archive
777021320220002 Closing Documents	John Smith (+2) struitt@docmagic.com	Signed 3153	1	2/13/23 3:28 PM	✓				
0213202300001 Closing Documents	John Smith (+2) aland@docmagic.com	New 3152	2	2/13/23 11:13 AM	✓				
77702091427 Closing Documents	John Smith (+2) struitt@docmagic.com	In Progress 3151	1	2/9/23 12:29 PM	✓	✓			
02082023 Closing Documents	Susan Sample SusanSample@example.com	Signed 02082023	1	2/8/23 11:42 AM	✓				
1675884726831 Closing Documents	1675884726831 Sample (+1) 1675884726831@example.com	Signed 1675884726831	1	2/8/23 11:32 AM	✓				
020720220001 Closing Documents	John Smith (+1) struitt@docmagic.com	Consented 3144	2	2/7/23 9:48 AM	✓	✓			
777020620220001 Closing Documents	John Smith (+2) aland@docmagic.com	In Progress 3147	1	2/6/23 11:27 AM	✓	✓			
1675352850673 Loan Application	Hassan Sample (+1) hassan.sample@example.com	New 1675352850673	1	2/2/23 7:47 AM	✓	✓			
777020220220003 Closing Documents	John Smith (+2) aland@docmagic.com	In Progress 3145	1	2/1/23 4:22 PM	✓				
1675293772697 Closing Documents	1675293772697 Sample (+1) 1675293772697@example.com	Signed 1675293772697	1	2/1/23 3:22 PM	✓				
2023013101 Enote Documents	Megan Sample (+1) sample.987987987@example.com	In Progress 2023013101	1	2/1/23 3:11 PM	✓				
777013020220001 Initial Disclosure	John Smith (+1) struitt@docmagic.com	Signed 3142	1	1/30/23 10:55 AM	✓	✓			
7770127202200011 Closing Documents	John Smith (+3) aland@docmagic.com	Signed 3140	1	1/27/23 9:09 AM	✓				

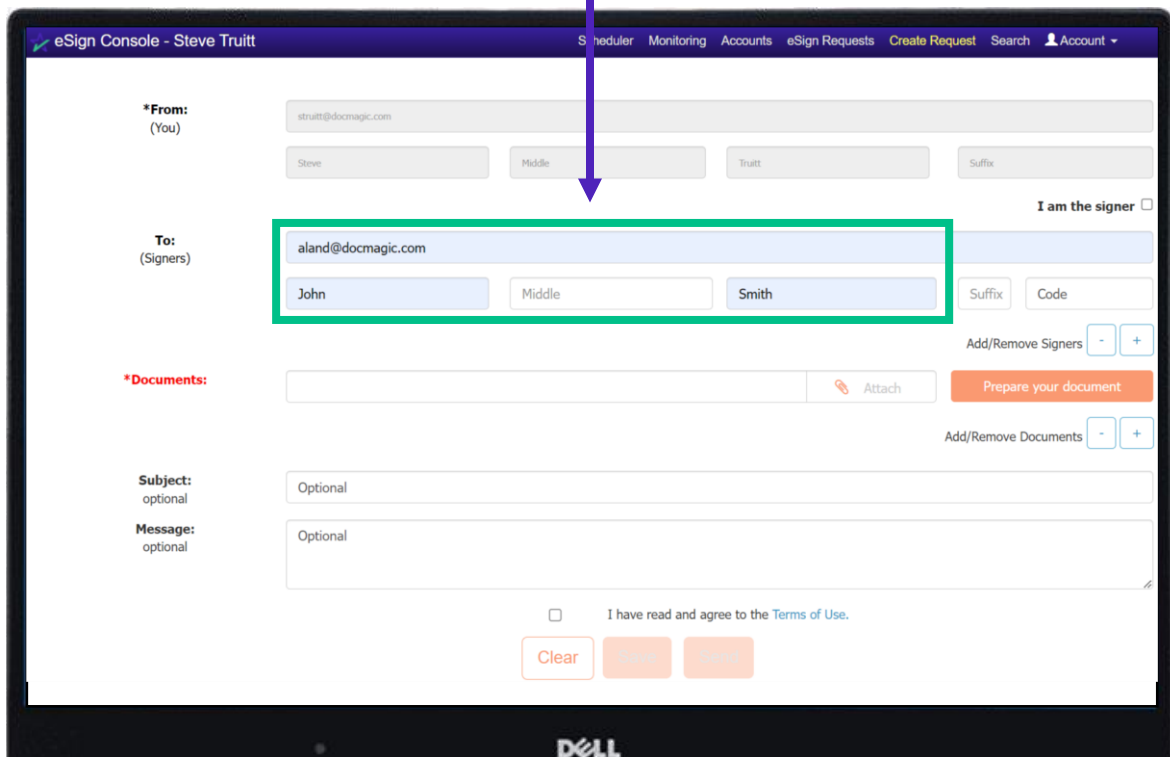
The status of every document you have sent out will be present in the eSign Console.



# Creating a Custom eSign Request

## Signers

Add the email and name of the signer.



The screenshot displays the 'eSign Console - Steve Truitt' interface. The top navigation bar includes links for Scheduler, Monitoring, Accounts, eSign Requests, Create Request, Search, and Account. The main form is divided into several sections:

- \*From: (You)**: Contains fields for email (struitt@docmagic.com), first name (Steve), middle name (Middle), last name (Truitt), and suffix.
- To: (Signers)**: This section is highlighted with a green box. It includes a text input field containing 'aland@docmagic.com', and fields for first name (John), middle name (Middle), last name (Smith), and suffix. To the right of these fields are checkboxes for 'I am the signer' and 'Add/Remove Signers' (- +).
- \*Documents:**: Includes a text input field, an 'Attach' button, and a 'Prepare your document' button. Below these are 'Add/Remove Documents' (- +) controls.
- Subject:** optional
- Message:** optional

At the bottom, there is a checkbox for 'I have read and agree to the Terms of Use.' and three buttons: 'Clear', 'Cancel', and 'Create'.



# Creating a Custom eSign Request

## Signers

You can create a code for the signer to log in with.

The screenshot shows the 'eSign Console - Steve Truitt' interface. The top navigation bar includes links for Scheduler, Monitoring, Accounts, eSign Requests, Create Request, Search, and Account. The main form has the following sections:

- \*From: (You)**: Fields for email (struitt@docmagic.com), first name (Steve), middle name (Middle), last name (Truitt), and suffix (Suffix). A checkbox labeled 'I am the signer' is present.
- To: (Signers)**: Fields for email (aland@docmagic.com), first name (John), middle name (Middle), last name (Smith), and suffix (Suffix). A 'Code' field is highlighted with a green box. Below these fields is a button labeled 'Add/Remove Signers' with minus and plus icons.
- \*Documents:**: A text input field, an 'Attach' button, and a 'Prepare your document' button.
- Subject:** optional
- Message:** optional

At the bottom, there is a checkbox for 'I have read and agree to the Terms of Use.' and three buttons: 'Clear', 'Cancel', and 'Create'.

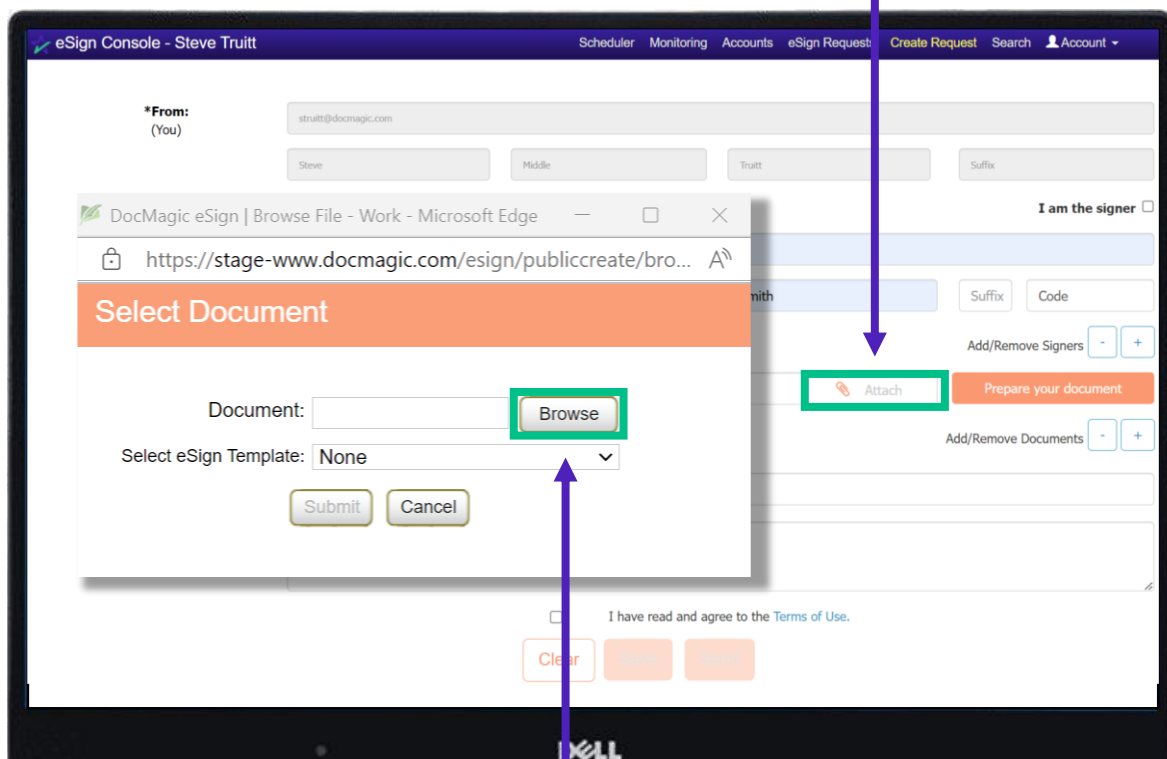
If you have multiple signers, you can add or remove them here.



# Creating a Custom eSign Request

## Documents

To upload a document, click Attach.



A separate window will appear. Click Browse to select a document to upload.

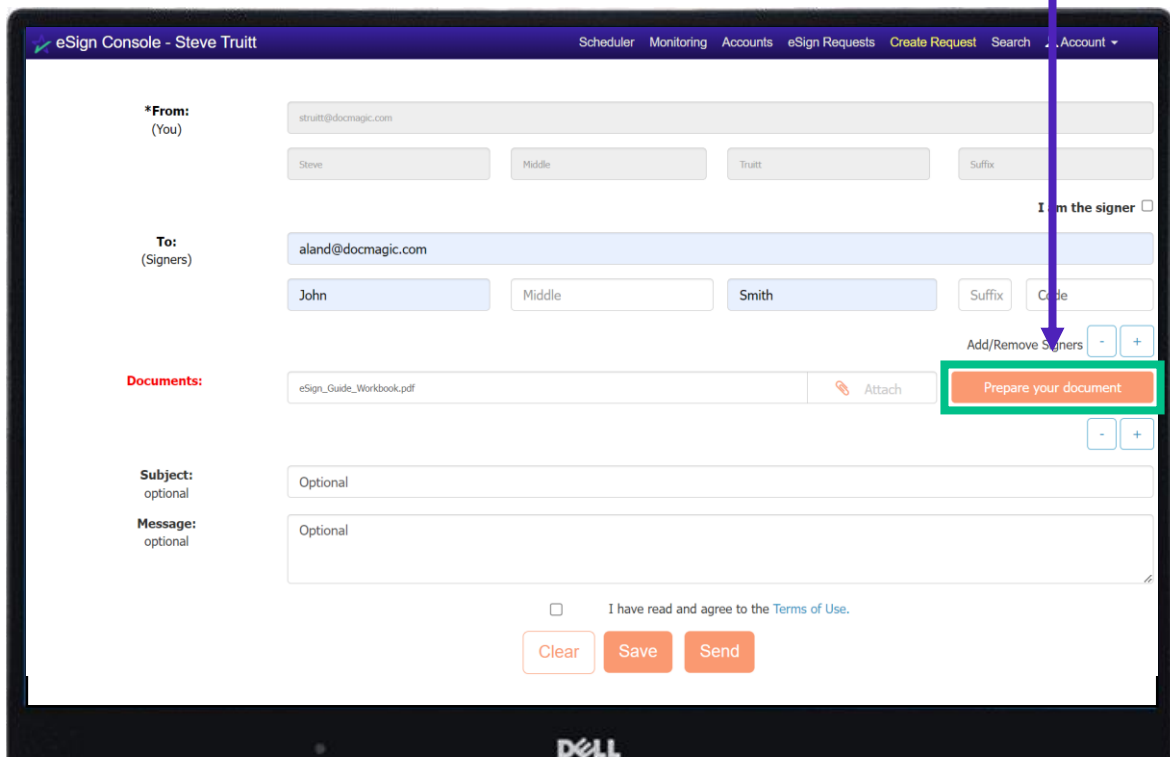




# Creating a Custom eSign Request

## Prepare Your Document

After uploading your document, choose Prepare your document.



The screenshot displays the 'eSign Console - Steve Truitt' interface. The top navigation bar includes links for Scheduler, Monitoring, Accounts, eSign Requests, Create Request, Search, and Account. The main form is divided into several sections:

- \*From: (You)**: Contains fields for email (struitt@docmagic.com), first name (Steve), middle name (Middle), last name (Truitt), and suffix (Suffix). There is a checkbox labeled 'I am the signer'.
- To: (Signers)**: Contains fields for email (aland@docmagic.com), first name (John), middle name (Middle), last name (Smith), suffix (Suffix), and code (Code). There are minus and plus buttons for adding or removing signers.
- Documents:**: Contains a text field with 'eSign\_Guide\_Workbook.pdf', an 'Attach' button, and a 'Prepare your document' button highlighted with a green box. There are also minus and plus buttons.
- Subject:**: A text field with 'Optional'.
- Message:**: A text field with 'Optional'.

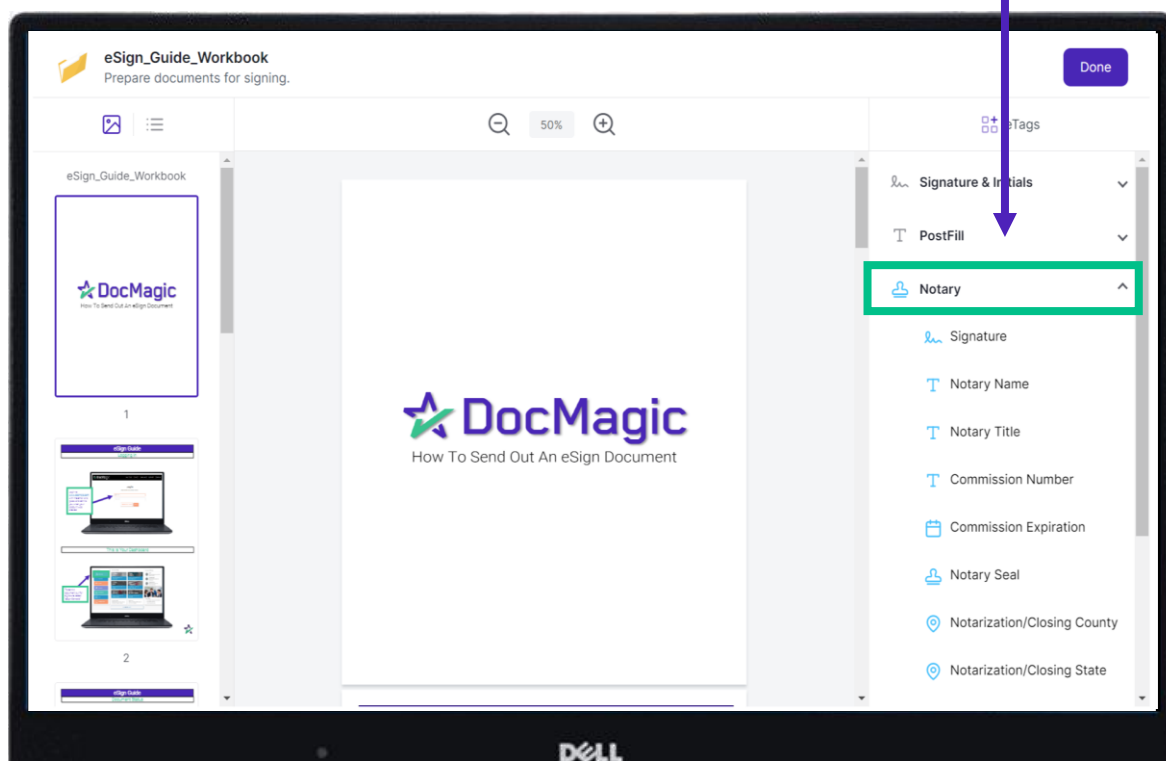
At the bottom, there is a checkbox for 'I have read and agree to the Terms of Use.' and three buttons: Clear, Save, and Send.



# Creating a Custom eSign Request

## Prepare Your Document

A separate window will appear, and you will be brought to our [Document Editor](#). Start by clicking on a category to expand the list of options.



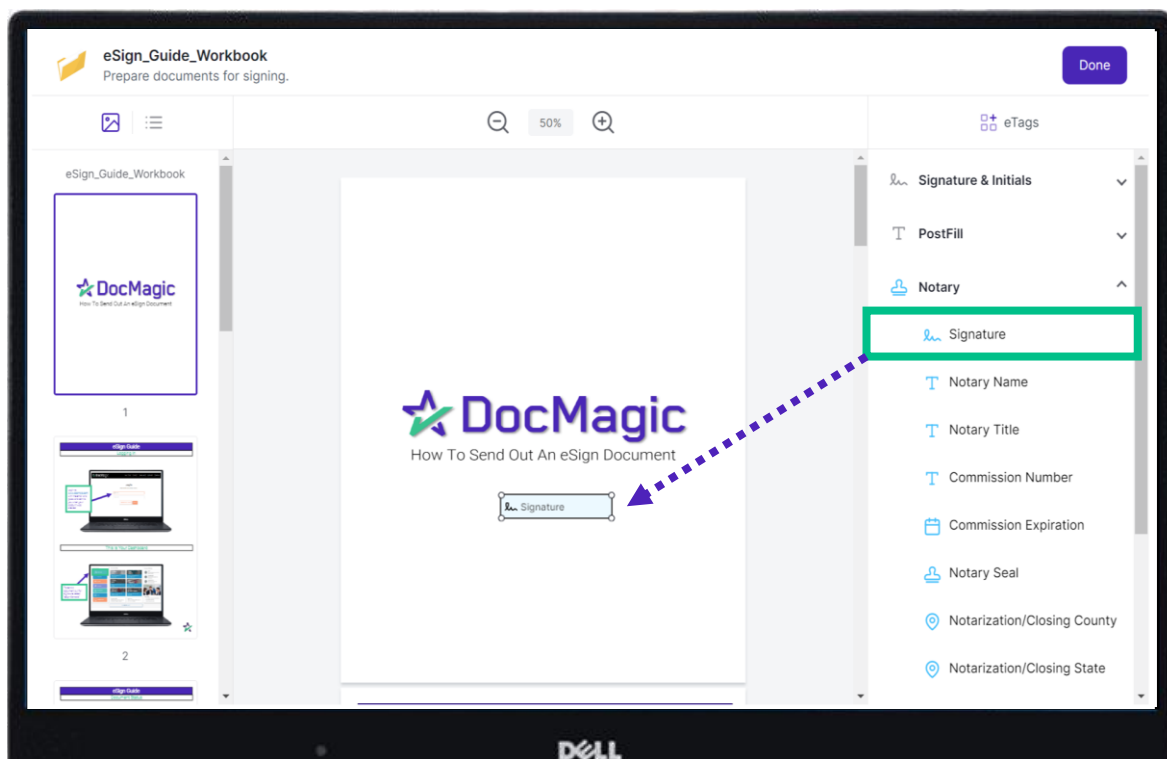
In this example, clicking Notary shows a list of notary related fields.



# Creating a Custom eSign Request

## Prepare Your Document

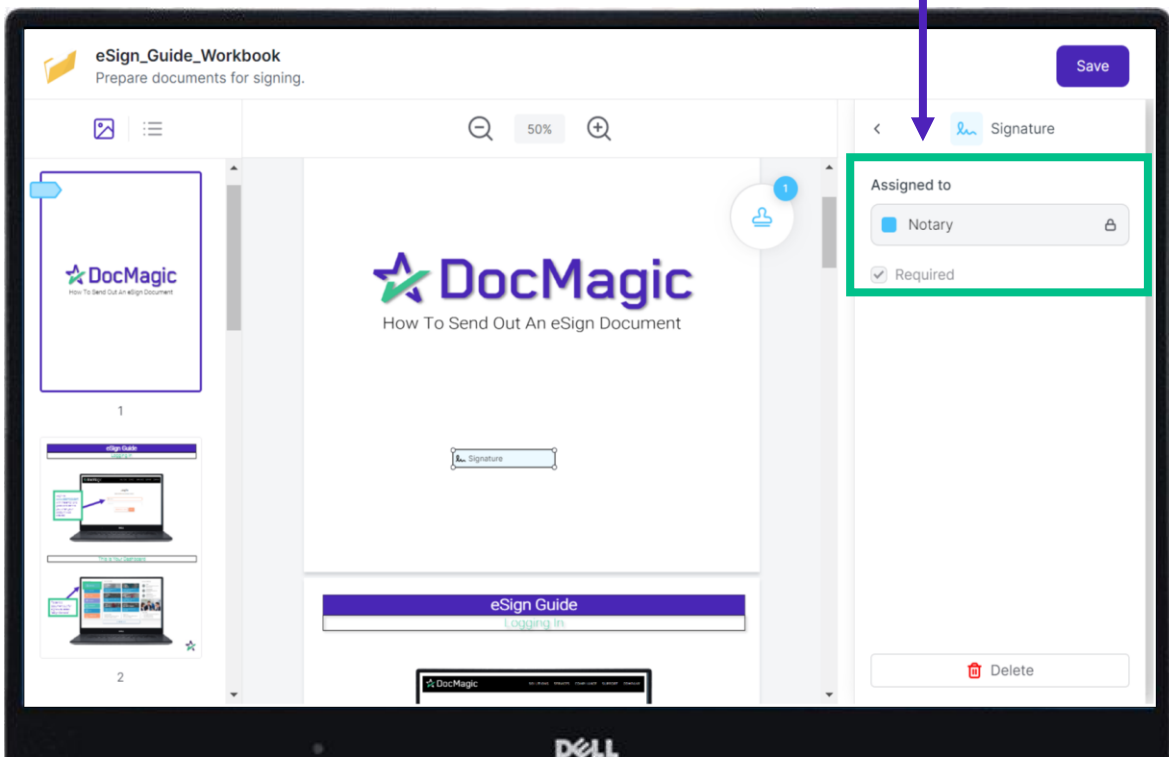
Select a field and then *drag* it to where you would like someone to sign or initial.



# Creating a Custom eSign Request

## Prepare Your Document

After you place a field, the right column shows you who it will be assigned to. Click on a field at any time to bring up this information column.



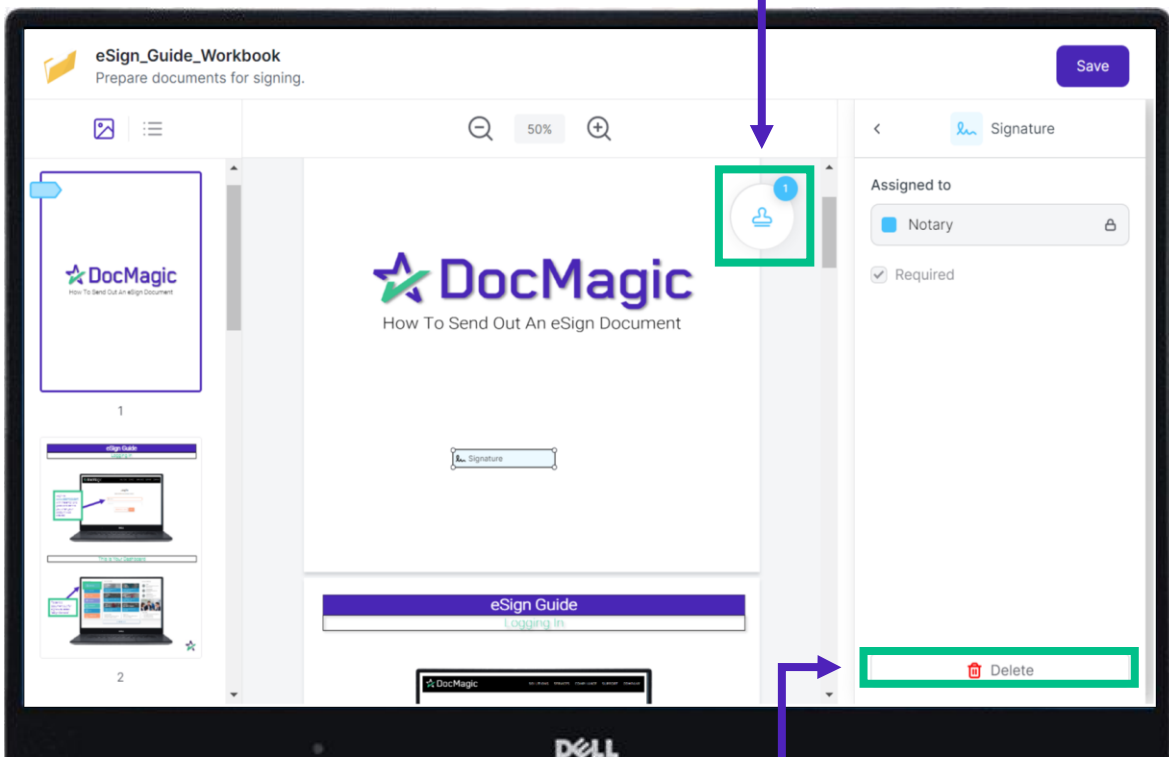
Since we selected a signature field from the Notary category, the field can only be assigned to the Notary (hence the locked symbol). In other cases, you can choose who a field is assigned to.



# Creating a Custom eSign Request

## Prepare Your Document

This little icon tells you that you have one notary field. Other icons will appear for other types of fields. Warnings – items that need to be addressed – will show up here too.



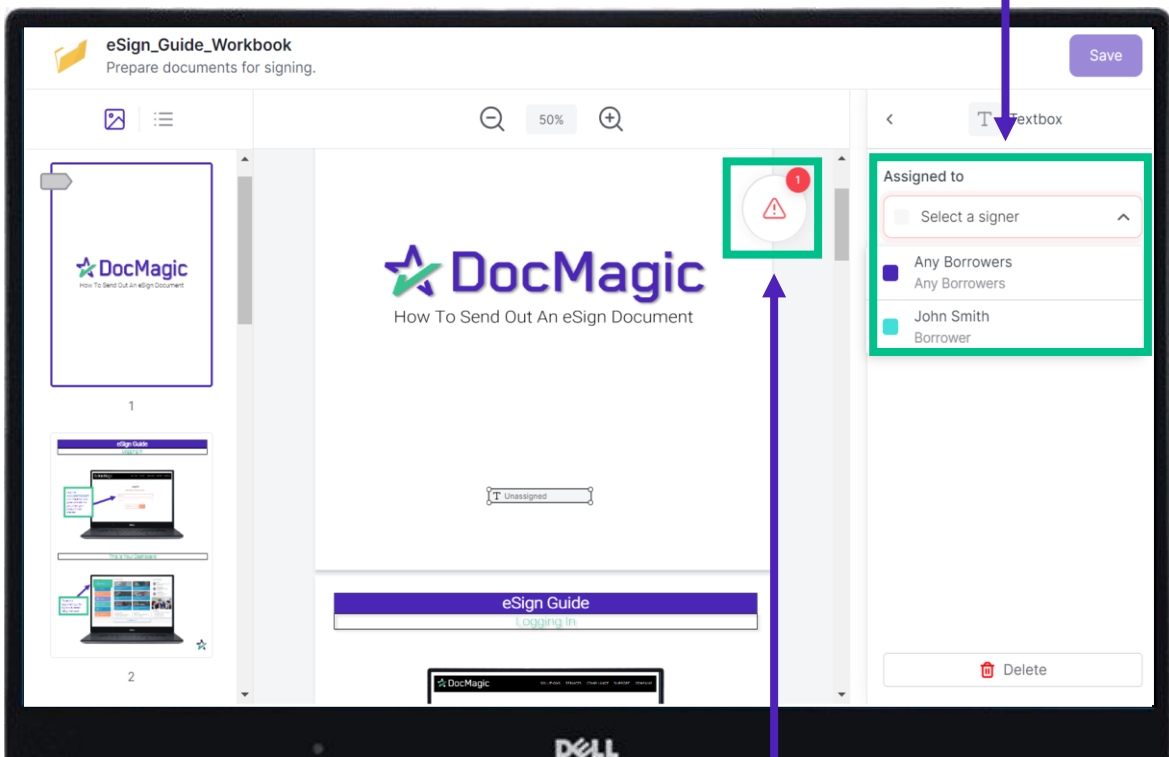
You can also delete the field from the bottom right or by hitting backspace/delete on your keyboard.



# Creating a Custom eSign Request

## Prepare Your Document

If you select a field from the Signatures & Initials or PostFill categories, you are required to assign it to a signer. The box will flash red until you do.



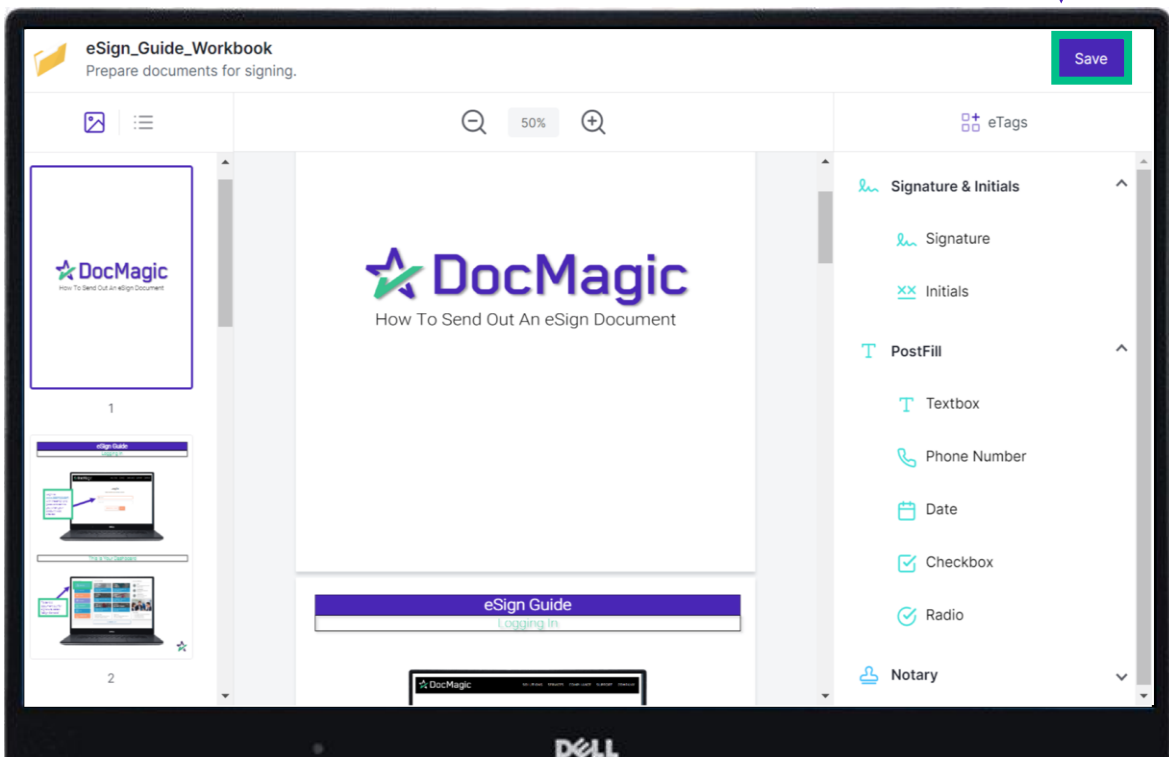
The warning that appears will go away after you select a signer.



# Creating a Custom eSign Request

Save

When you're done, hit Save. If the button is greyed out, you probably have an error somewhere.



# Creating a Custom eSign Request

## Optional Subject & Message

Close the window. You will be returned to the eSign Console shown below.

The screenshot displays the 'eSign Console - Steve Truitt' interface. The top navigation bar includes links for Scheduler, Monitoring, Accounts, eSign Requests, Create Request, Search, and Account. The main form is divided into sections:   
 - **\*From: (You)**: Fields for email (struitt@docmagic.com), first name (Steve), middle name (Middle), last name (Truitt), and suffix.   
 - **(Signers)**: Fields for email (aland@docmagic.com), first name (John), middle name (Middle), last name (Smith), suffix, and code.   
 - **\*Documents:**: A field for document name (eSign\_Guide\_Workbook.pdf), an 'Attach' button, and a 'Prepare your document' button.   
 - **Subject:** optional (highlighted with a green box).   
 - **Message:** optional (highlighted with a green box).   
 - A checkbox for 'I am the signer'.   
 - A checkbox for 'I have read and agree to the Terms of Use.'   
 - Buttons for 'Clear', 'Save', and 'Cancel'.   
 A purple arrow points from the text box below to the 'Subject' and 'Message' fields.

You have the option of adding a Subject or Message.





# Creating a Custom eSign Request

Send It

Check the box agreeing to the Terms of Use and the Send button will illuminate.

eSign Console - Steve Truitt

Scheduler Monitoring Accounts eSign Requests Create Request Search Account

**\*From:**  
(You)

struitt@docmagic.com

Steve Middle Truitt Suffix

**(Signers)**

aland@docmagic.com

John Middle Smith Suffix Code

**\*Documents:**

eSign\_Guide\_Workbook.pdf Attach Prepare your document

**Subject:**  
optional

Optional

**Message:**  
optional

Optional

☒ I have read and agree to the Terms of Use.

Clear Save Send

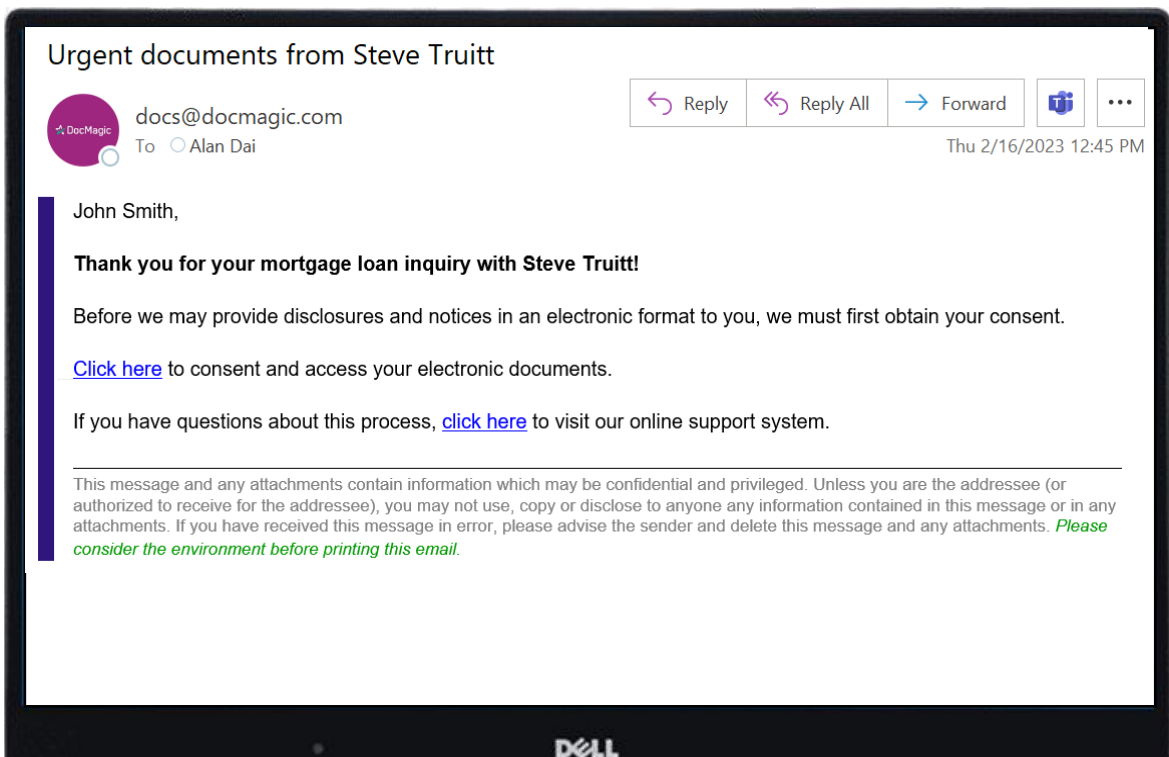
If everything looks good, hit Send.



# Creating a Custom eSign Request

## Emails

After you hit send, participants will receive this email asking them to sign.



You will receive the following e-mails:

- Confirmation with all the details of the document sent out for signature
- Notification when a signer finishes
- Final email when a document is fully signed

