

Document Editor

User Guide – 2026 Revision

Getting to the Document Editor

The image shows two side-by-side screenshots of user consoles. The left screenshot is the 'eSign Console - Alan Dai' and the right is the 'DocMagic eClose Console (Settlement Agent)'. Both show loan details for Loan # 777072820260001, Primary Name John Smith, Type EClosing, Package ID 1674842, Worksheet # 4430 (Version: 1), and Closing Date 8/7/26. The left console has tabs for Details, Documents, Documents Received, EMail, and Versions. The 'Documents' tab is active, showing a list of 17 documents. A blue arrow points to the pencil icon next to the 'Documents' tab. The right console has tabs for Details, eJournal, and Action Log. The 'Details' tab is active, showing a list of 3 signers. A blue arrow points from the 'Settlement Agent' role in the signers list to the 'Documents (36)' section below it, which shows a list of 36 documents. The 'Documents (36)' section has a table with columns #, eSign Enabled, and Document Name.

eSign Console - Alan Dai

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

Details Documents Documents Received EMail Versions

Documents + ✎ ←

Document Name
1 Evidence of Joint Application
2 New Jersey Addendum to Residential Mortgage Loan Application
3 New Jersey Addendum to Residential Mortgage Loan Application
4 Uniform Residential Loan Application
5 Uniform Residential Loan Application
6 Multistate Fixed Rate Note
7 New Jersey Mortgage (MERS)
8 General Closing Instructions
9 Specific Closing Instructions
10 Borrower's Certification, Authorization and Consent
11 Borrower's Certification, Authorization and Consent
12 Certificate of Loans to One Borrower
13 Hazard Insurance Authorization and Requirements
14 IVES Request for Transcript of Tax Return
15 IVES Request for Transcript of Tax Return
16 W9 - Payers Request for Taxpayer ID
17 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

Details eJournal Action Log

Signers (3) +

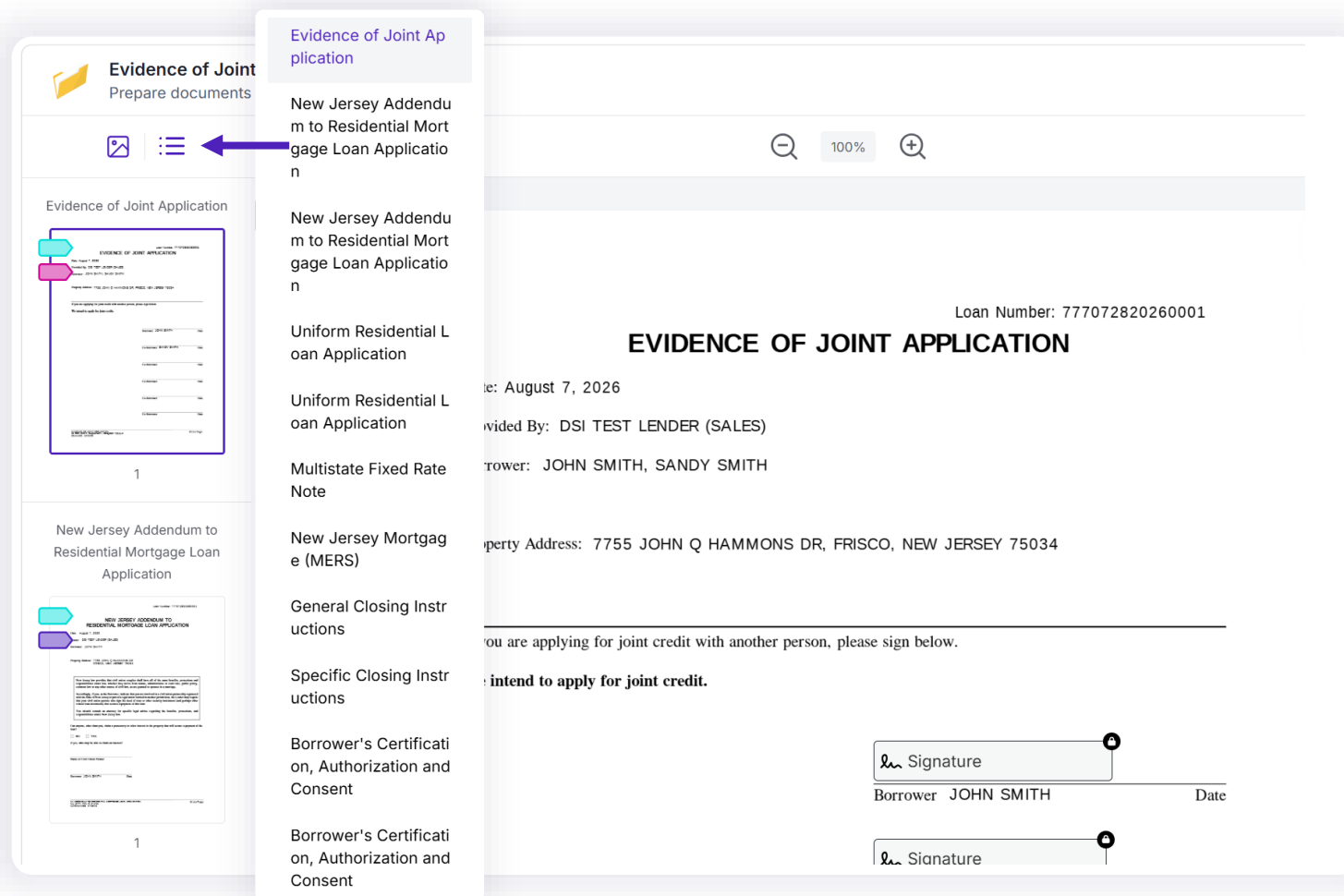
#	Signer Name / Email	Role	Notary Name / Email
1	John Smith aland@docmagic.com	Borrower	Notary_name_placeholde... NOTARY_EMAIL_PLACE...
2	Sandy Smith aland@docmagic.com	Borrower	Notary_name_placeholde... NOTARY_EMAIL_PLACE...
3	Byron Oden aland@docmagic.com	Settlement Agent	

Documents (36) + ✎ 📄 📁

#	eSign Enabled
1	Evidence of Joint Application

- The Document Editor can be accessed from the following user consoles by clicking on the pencil icon next to Documents:
 - eSign Console (Lender)
 - Settlement Agent eClose Console
 - Notary eClose Console
- It will also be triggered after an uploaded document goes through our AutoPrep workflow.

Left Panel – Thumbnail vs List View



- By default, document thumbnails are displayed in the left panel. The thumbnail view displays color-coded markers indicating which participants have document marks on each page. Each color represents a different participant.
- To switch to a condensed list view, click the menu icon (three horizontal lines) located above the document list. This view can make it easier to navigate the document stack and quickly locate specific documents.

Grey Tags = DocMagic, No Editing

On  Signing Date  , JOHN SMITH

(names(s) of signer(s)/witness(es))

who has/have satisfactorily identified himself/herself/themselves as the signer(s)/witness(es) to the above referenced document and has/have executed this document as his/her/their own act.

 T RON Regulatory Language  This eTag cannot be edited

 Signature 
Signature of Notarial Officer
 T Notary Name

 T Notary Title 
Title of Office

 My commission expires:  Commission ...

 Notary Seal 
(Stamp)

- A tag is a field within a document that requires action from a participant, such as a signature, initial, date, notarization, or data entry.
- Please note that document tags generated as part of the original package cannot be modified. These DocMagic tags are embedded on DocMagic forms and are configured by our Forms Team.
- Non-editable tags are identified by a lock icon. Hovering over a locked tag will display the message, "This eTag cannot be edited."
- If a locked tag requires change, the package must be redrawn.

Notary = Blue, Other = Green

Evidence of Joint Application
Prepare documents for signing.

Loan Number: 777072820260

EVIDENCE OF JOINT APPLICATION

Date: August 7, 2026

Provided By: DSI TEST LENDER (SALES)

Borrower: JOHN SMITH, SANDY SMITH

Property Address: 7755 JOHN Q HAMMONS DR, FRISCO, NEW JERSEY 75034

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

We intend to apply for joint credit.

Signature
Borrower JOHN SMITH Date

Signature
Co-Borrower SANDY SMITH Date

Co-Borrower Date

Co-Borrower Date

- Click the **green** checkmark icon to jump to the next signer tag assigned to a participant other than the Notary. The number displayed next to the icon indicates the total number of non-Notary signer tags in the package (306 in this example).
- Click the **blue** stamp icon to jump to the next Notary tag. The number displayed next to this icon indicates the total number of Notary tags in the package (109 in this example).
- You may use this method to validate that all the tags have been correctly placed instead of manually scrolling through the entire document package.

Adding Non-Notary Signer Tags

Loan Number: 777072820260001

EVIDENCE OF JOINT APPLICATION

Date: August 7, 2026

Provided By: DSI TEST LENDER (SALES)

Borrower: JOHN SMITH, SANDY SMITH

Property Address: 7755 JOHN Q HAMMONS DR, FRISCO, NEW JERSEY 75034

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

We intend to apply for joint credit.

Signature
Borrower JOHN SMITH Date

Signature
Co-Borrower SANDY SMITH Date

306
109

eTags

- Signature & Initials
- Signature
- Initials
- PostFill
- Textbox
- Phone Number
- Date
- Checkbox
- Radio
- Notary

- If you need to add and assign a tag to a signer other than the Notary, use the Signatures & Initials or PostFill sections in the eTags panel on the right. Click either heading to expand or collapse the available tag options.
- Select the desired tag type (ex. Signature or Textbox). You can either click and drag the tag to the appropriate location on the document or click the tag once to have it automatically placed near the center of the page.
- While the grey DocMagic tags cannot be modified, additional tags may still be added to the document if it has not been signed.

Adding Non-Notary Signer Tags

The screenshot displays the DocMagic interface for a document titled "EVIDENCE OF JOINT APPLICATION". The document contains the following information:

- Loan Number: 777072820260001
- Date: August 7, 2026
- Provided By: DSI TEST LENDER (SALES)
- Borrower: JOHN SMITH, SANDY SMITH
- Property Address: 7755 JOHN Q HAMMONS DR, FRISCO, NEW JERSEY 75034

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

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

We intend to apply for joint credit.

There are two signature lines at the bottom:

- Borrower JOHN SMITH (with a signature icon and a date field)
- Co-Borrower SANDY SMITH (with a signature icon and a date field)

On the right side, there is a sidebar for adding tags. The sidebar has a "Textbox" header and a "Assigned to" section. The "Assigned to" section has a dropdown menu labeled "Select a signer" (highlighted with a red box) and a list of participants:

Assigned to
☐ Any Borrowers Any Borrowers
☒ JOHN SMITH Borrower
☐ SANDY SMITH Borrower
☐ BYRON ODEN Settlement Agent

Three blue arrows point to the "Unassigned" tag, the warning icon in the sidebar, and the "Select a signer" dropdown menu.

- When a tag is selected, four dots will appear at its corners. This indicates that the tag is active and can be modified. You may resize the tag, drag it to a different location, or assign it to a participant.
- All tags must be assigned to a participant, and Unassigned tags will be grey. A warning icon will appear, and the Select a signer field will flash red until a signer is selected.

Adding Non-Notary Signer Tags

Loan Number: 777072820260001

EVIDENCE OF JOINT APPLICATION

Date: August 7, 2026

Provided By: DSI TEST LENDER (SALES)

Borrower: JOHN SMITH, SANDY SMITH

Property Address: 7755 JOHN Q HAMMONS DR, FRISCO, NEW JERSEY 75034

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

We intend to apply for joint credit.

Signature
Borrower JOHN SMITH Date

Signature
Co-Borrower SANDY SMITH Date

Assigned to
JOHN SMITH

☐ Required

Delete

- Here is what the tag looks like after a signer has been assigned. The Required checkbox determines whether the signer must complete the field before proceeding. Signature fields are marked as required by default and this setting cannot be changed.
- Notice that the warning triangle has disappeared, and the text box is no longer greyed out or labeled Unassigned.
- If you added the tag by mistake, you can remove it by clicking Delete in the lower-right corner or by pressing the Delete key on your keyboard.

Adding Non-Notary Signer Tags

Loan Number: 777072820260001

EVIDENCE OF JOINT APPLICATION

Date: August 7, 2026

Provided By: DSI TEST LENDER (SALES)

Borrower: JOHN SMITH, SANDY SMITH

Property Address: 7755 JOHN Q HAMMONS DR, FRISCO, NEW JERSEY 75034

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

We intend to apply for joint credit.

Signature
Borrower JOHN SMITH Date

Signature
Co-Borrower SANDY SMITH Date

Assigned to
JOHN SMITH

Required
☐

Quantity
1

- If you need a participant to select one option from a list of choices, use the Radio tag located in the PostFill section. As with other tags, you can drag and drop it onto the document or place it in the desired location.
- Once the tag has been added, use the properties panel on the right to assign it to a participant, mark it as required, and configure the number of available options. You can also click on the (+) icon at the bottom of the tag to add more options.
- If you simply need a participant to acknowledge a statement by checking a box, use the Checkbox tag instead.

Adding Notary Tags

The screenshot displays a document editor interface. On the left, a notary form is visible with fields for State of, County of, Signed and sworn to (or affirmed) before me on, and a Notary Seal (Stamp). The form includes a dropdown menu for State of and County of, both labeled 'Notarization/Closi...'. The 'Signed and sworn to (or affirmed) before me on' field is labeled 'Signing Date'. The 'Notary Seal (Stamp)' field is labeled '(Stamp)'. The form also includes a section for 'This notarial act involved the use of communication technology.' with a dropdown menu for 'RON Regulatory Language'. On the right, a tag menu is open, showing a list of tags. The 'Notary' tag is highlighted with a blue arrow. The 'RON Regulatory Language' tag is also highlighted with a blue arrow. The tag menu includes the following tags: Signature & Initials, PostFill, Notary, Signature, Notary Name, Notary Title, Commission Number, Commission Expiration, Notary Seal, Notarization/Closing County, Notarization/Closing State, Notarization Date, Personally Appeared, Signing Date, RON Regulatory Language, and Annotation.

State of

County of ss

Signed and sworn to (or affirmed) before me on , by

JOHN SMITH

(affiant's name)

This notarial act involved the use of communication technology.

Signature of Notarial Officer

Title of Office

My commission expires:

(Stamp)

Signature & Initials

PostFill

Notary

Signature

Notary Name

Notary Title

Commission Number

Commission Expiration

Notary Seal

Notarization/Closing County

Notarization/Closing State

Notarization Date

Personally Appeared

Signing Date

RON Regulatory Language

Annotation

- Remember: Notary tags are **blue**. If you need to add a field for the Notary, be sure to select it from the Notary section. Notary tags are automatically assigned to the Notary and cannot be reassigned to another participant. Likewise, non-Notary tags cannot be assigned to the Notary.
- Most Notary tags are designed to automatically populate information when appropriate. For example, the RON Regulatory Language tag will automatically apply the state-specific wording required on remotely notarized documents.

Adding Notary Tags

The screenshot displays the DocMagic Notary interface. The main document area contains several tags: a text tag 'This notarial act involved the use of communication technology.', a text tag 'RON Regulatory Language', a 'Notary Seal' (Stamp), a 'Signature' tag, a 'Signature of Notarial Officer' tag, a 'Notary Name' tag, a 'Notary Title' tag, a 'Title of Office' tag, and a 'Commission Expires' tag. A 'Signing Date' tag is highlighted with a blue arrow. Below it is an 'Annotation' tag, also highlighted with a blue arrow. The right-hand panel shows the configuration for the 'Signing Date' tag. It includes a dropdown for 'Assigned to' (set to 'Notary'), a checkbox for 'Required' (checked), and a 'Select a Format' dropdown (set to 'Default'). A list of date formats is shown: 'Default (ex. May 17, 2022)', 'DD (ex. 1st, 2nd ...)', 'MM (ex. May)', 'MM+YYYY (ex. May 2022)', 'YYYY (ex. 2022)', and 'YY (ex. 22)'. The bottom of the screen shows the 'COMPLIANCE AGREEMENT' and 'DocMagic' logo.

- If you add a Signing Date tag from the Notary section, you can choose the date format that will be displayed. By default, dates are formatted as "June 6, 1944."
- If you add any date related Notary tags (Signing, Notarization, Commission Expiration) the Notary will have to select the date during the notarization session.
- If the Notary needs to manually enter text, use the Annotation tag – it is the only Notary tag that can be optional. All other Notary tags are required by default, meaning the Notary must complete them before proceeding.

Click Save, then Done

The screenshot displays the DocMagic Document Editor interface. At the top right, a purple arrow points to a 'Save' button, and another purple arrow points down to a 'Done' button. The document content includes:

Loan Number: 777072820260001

EVIDENCE OF JOINT APPLICATION

Date: August 7, 2026

Provided By: DSI TEST LENDER (SALES)

Borrower: JOHN SMITH, SANDY SMITH

Property Address: 7755 JOHN Q HAMMONS DR, FRISCO, NEW JERSEY 75034

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

We intend to apply for joint credit.

Signature fields for Borrower (JOHN SMITH) and Co-Borrower (SANDY SMITH) are shown, each with a signature line and a date line.

On the right side, there is a sidebar with a list of tags: Signature & Initials, PostFill, Textbox, Phone Number, Date, Checkbox, Radio, and Notary. The 'Save' and 'Done' buttons are located at the top right of the sidebar.

- Once you are satisfied with the tag placement and configuration, click Save to save your changes. Wait for the button text to update, then click Done to exit the Document Editor and return to your user console.

Adding Tags After Signing Begins

Signing completed for Evidence of Joint Application

Loan Number: 777072820260001

EVIDENCE OF JOINT APPLICATION

Date: August 7, 2026

Provided By: DSI TEST LENDER (SALES)

Borrower: JOHN SMITH, SANDY SMITH

Property Address: 7755 JOHN Q HAMMONS DR, FRISCO, NEW JERSEY 75034

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

We intend to apply for joint credit.

John Smith
07/28/26 03:34:23 PM PDT
Borrower JOHN SMITH Date

Sandy Smith
07/28/26 03:39:28 PM PDT
Co-Borrower SANDY SMITH Date

- You may continue using the Document Editor to modify tags until the package has been completed and fully signed. However, documents that have already received all required signatures can no longer be edited.
- When a document is locked from further editing, a green banner will appear at the top of the document, and a green checkmark will be displayed next to the document name in the left panel.