



Settlement Agent eClose Console with AutoPrep

GUIDEBOOK

Table of Contents

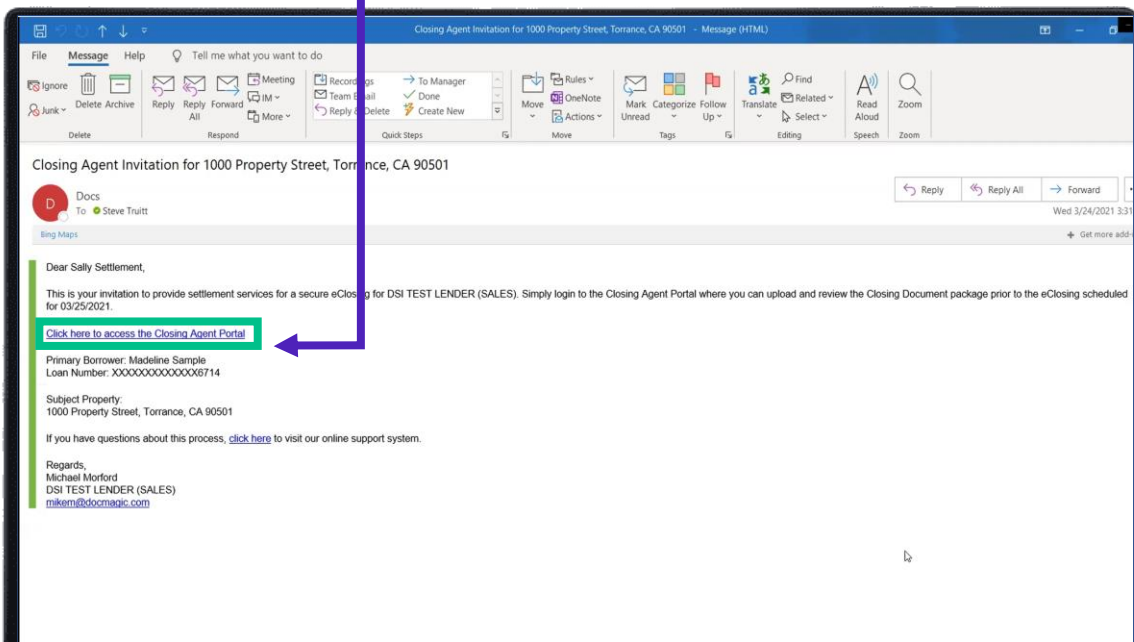
Email Invitation Access to SA Portal	Page 3
eClose Console Walk-Through	Page 5
Inviting Other Participants	Page 10
Document Upload (AutoPrep)	Page 18
Wet-Signed Documents	Page 34
Assigning a Notary	Page 36
Ready to Close	Page 42



Settlement Agent Invitation Email

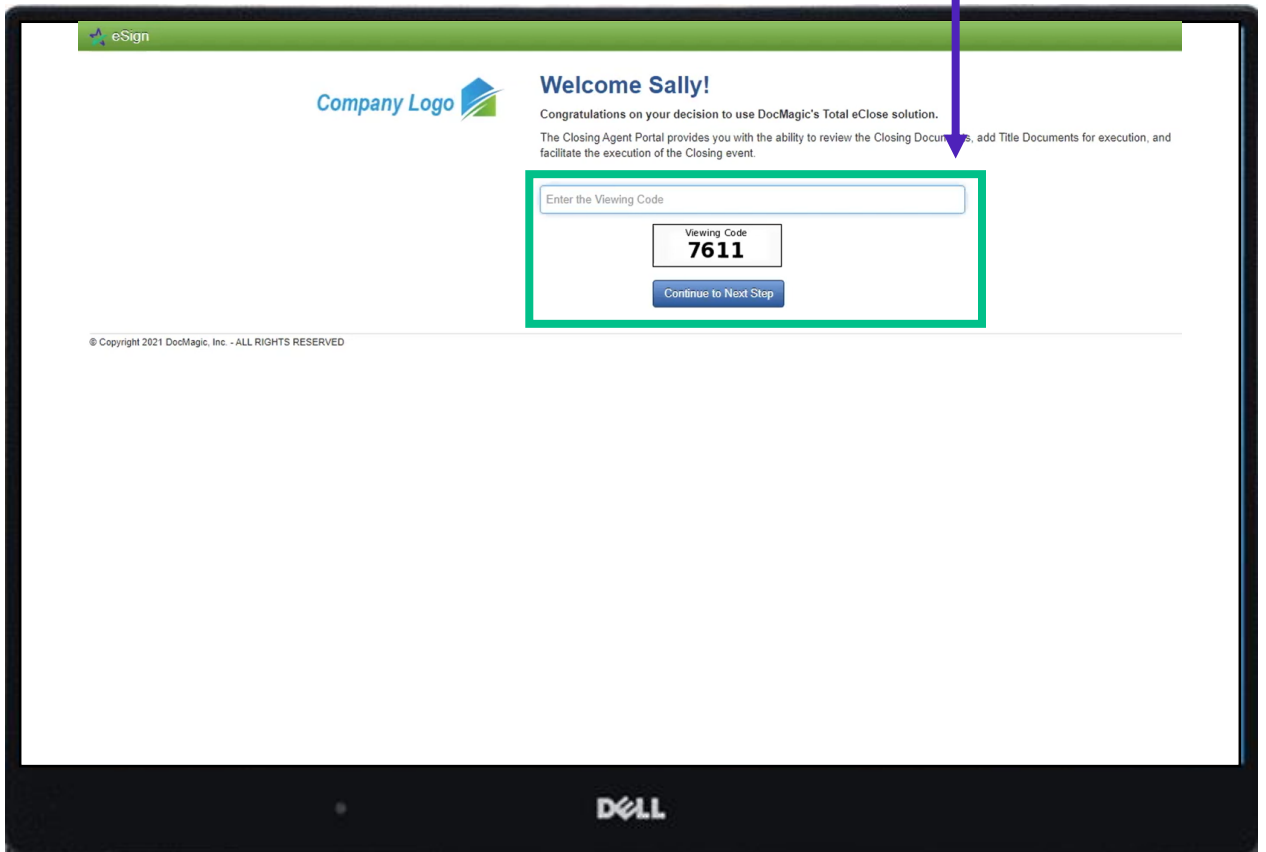
The Settlement Agent will receive an invitation email when the lender creates the eClose event.

This link, along with the email is specific to this particular transaction.



Agent Login

The Settlement Agent will receive an invitation email and arrive at this verification page.



eClose Console

This is the Settlement Agent's portal where you can check documents, assign signers, and verify the process as you go.

All pertinent loan information is at the top of your screen including borrower and lender info.

The screenshot displays the DocMagic eClose Console (Settlement Agent) interface. At the top, the user is logged in as Sally. The main content area is divided into several sections:

- 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:** A digital clock showing 0 days, 6 hours, 51 minutes, and 26 seconds. Date: Mar 25, 2021 (Thu), Time: 12:00am PDT.
- Navigation:** Details, eJournal, Action Log, and Ready to Close buttons.
- Signers (2):** A table listing signers with columns for #, Signer Name / Email, Role, Notary Name / Email, Notary Type / Closing Date - Time, KBA / Status, ID Verify / Status, Status, and eSign. Two signers are listed: Erica Sample (Borrower) and Sally Settlement (Settlement Agent).
- Documents (15):** A table listing documents with columns for #, eSign Enabled, Page(s), Signer(s), and Completed. Six documents are listed, all marked as completed.

#	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@exampl...	Settlement Agent	Unassigned				● Ready to Sign	Open Signing Room

#	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	✓



Countdown Clock

The eClosing Countdown Clock keeps you on track right up to the moment of closing.

The screenshot displays the DocMagic eClose Console interface for a Settlement Agent. The top navigation bar includes the DocMagic logo, the text "eClose Console (Settlement Agent)", and a user profile for "Sally".

Key sections of the interface include:

- 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:** A green-bordered box showing a timer with 0 days, 6 hours, 51 minutes, and 26 seconds. The date is Mar 25, 2021 (Thu) and the time is 12:00am PDT.
- Signers (2):** A table listing signers with columns for Signer Name / Email, Role, Notary Name / Email, Notary Type / Closing Date - Time, KBA / Status, ID Verify / Status, Status, and eSign. Two signers are listed: Erica Sample (Borrower) and Sally Settlement (Settlement Agent).
- Documents (15):** A table listing documents with columns for #, eSign Enabled, Page(s), Signer(s), and Completed. Six documents are shown, all marked as completed.

The Dell logo is visible at the bottom center of the screen.



Help Button

From the Agent Portal, you can find a tutorial just like the one you're reading now. Just click on the name, then Help.

The screenshot displays the DocMagic eClose Console interface for a Settlement Agent. At the top right, the user 'Sally' is logged in, and a dropdown menu is open, showing options: Dashboard, My Account, Preferences, Contact Us, Help (highlighted), and Sign Out. The main content area includes:

- LOAN** section: Loan # 777-1616630796081, Primary Borrower: Erica Sample, Type: EClosing, Package ID: 333727, Worksheet #: 1616630796081 (Version: 1).
- LENDER** section: Company: DSI TEST LENDER (SALES), Contact: Michael Morford, Email: mikem@docmagic.com, Phone: (800) 649-1362.
- COUNTDOWN TO CLOSING** section: 0 days, 0 hours, 0 minutes, 0 seconds. Date: Mar 25, 2021 (Thu).
- Signers (2)** table:

#	Signer Name / Email	Role	Notary Name / Email	Notary Type / Closing Date - Time	KBA / Status	ID Verify / Status
1	Erica Sample erica.sample@example.c...	Borrower	Notary_name_placehold... NOTARY_EMAIL_PLACE...	3/25/2021 - 12:00am		
2	Sally Settlement sally.settlement@exampl...	Settlement Agent	Unassigned			

Buttons: Ready to Sign, Open Signing Room

- Documents (15)** table:

#	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	✓

Preview Mode: ON



Signer's Tab

The Signer's area highlights the information of all closing participants.

Doc Magic 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

Details eJournal Action Log Ready to Close

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@exampl...	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	✓

DELL



Signer's Details

Click on the signer's name to view, edit, or delete participant information. Make sure there is an email listed.

The screenshot displays the DocMagic eClose Console interface. A modal window titled "Participant Details" is open, allowing for the management of a signer's information. The modal includes the following fields and options:

- First Name:** Erica
- Last Name:** Sample
- Email:** erica.sample@example.com
- Phone Number:** () - -
- Access Code:** 0001
- Role:** Borrower (selected from a dropdown menu)

At the bottom of the modal are three buttons: "Cancel", "Delete", and "Save".

In the background, the "Signers (2)" list is visible, with "Erica Sample" highlighted. The "Documents (15)" list includes items such as "Uniform Residential Loan Application", "MERS California Deed of Trust", and "Borrower Consent to the Use of Tax Return Information".



Adding Participants

Click on the Silhouette Icon to add a participant.

Fill out every line, then select a role for the participant.

The screenshot shows the DocMagic eClose Console interface. The 'Add Participant' dialog box is open, displaying the following fields:

- First Name:
- Last Name:
- Email:
- Phone Number:
- Access Code:
- Role:

The 'Add' button is highlighted with a green box. The background interface shows a loan summary, a countdown to closing, and a list of documents.

Click Add and they will be saved to the participants list.



Notary - Signer's Tab

Depending on the Notary provider, identity validation techniques like KBA & ID Verify will be enabled.

The screenshot displays the DocMagic eClose Console interface for a Settlement Agent. The top navigation bar includes the DocMagic logo, the text 'eClose Console (Settlement Agent)', and a user profile for 'Sally'. The main content area is divided into several sections:

- 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:** A timer showing 0 days, 6 hours, 51 minutes, and 26 seconds. Date: Mar 25, 2021 (Thu), Time: 12:00am PDT.
- Signers (2):** A table listing signers with columns for Signer Name / Email, Role, Notary Name / Email, Notary Type / Closing Date - Time, KBA / Status, ID Verify / Status, Status, and eSign. The 'KBA / Status' and 'ID Verify / Status' columns are highlighted with a green box. A purple arrow points from the text above to this box.
- Documents (15):** A table listing documents with columns for #, eSign Enabled, Page(s), Signer(s), and Completed.

#	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@exampl...	Settlement Agent	Unassigned				● Ready to Sign	Open Signing Room

#	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	✓

Note: This is only applicable for closing types with eNotary enabled – Hybrid 3 and Total eClose.



Notary - Signer's Tab

The Notary information is in "place-holder" mode until the notary accepts their invitation.

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

Details eJournal Action Log Ready to Close

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@exempl...	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	✓

Note: This is only applicable for closing types with eNotary enabled – Hybrid 3 and Total eClose.



Notary - Signer's Tab

The closing date and time is listed here. You can edit this right in the window, or in the Assign Notary pop-up.

The screenshot displays the DocMagic eClose Console interface for a Settlement Agent. The top navigation bar includes the DocMagic logo, the text 'eClose Console (Settlement Agent)', and a user profile for 'Sally'. The main content area is divided into several sections:

- LOAN:** Loan #: 777-1616630796081, Primary Borrower: Erica Sample, Type: EClosing, Package ID: 333727, Worksheet #: 1616630796081 (Version: 1).
- LENDER:** Company: DISBEST LENDER (SALES), Contact: Michael Morford, Email: mmorfo@docmagic.com, Phone: (818) 649-1362.
- COUNTDOWN TO CLOSING:** A digital clock showing 0 days, 6 hours, 51 minutes, and 26 seconds. Date: Mar 25, 2021 (Thu), Time: 12:00am PDT.
- Signers (2):** A table with columns: #, Signer Name / Email, Role, Notary Name / Email, Notary Type / Closing Date - Time, KBA / Status, ID Verify / Status, Status, and eSign. The 'Notary Type / Closing Date - Time' column for the first signer (Erica Sample) is highlighted with a green box and contains the value '3/25/2021 - 12:00am'. A blue arrow points from the text box above to this cell.
- Documents (15):** A table with columns: #, eSign Enabled, Page(s), Signer(s), and Completed. It lists six documents, all of which are completed.

Note: This is only applicable for closing types with eNotary enabled – Hybrid 3 and Total eClose.



Preview Tab

Preview Mode stays on until Midnight Hawaii time of the closing date.

DocMagic eClose Console (Settlement Agent) Sally

LOAN Loan #: 777-1616630796001
Primary Borrower: Erica Sample
Type: EClosing
Package ID: 333727
Worksheet #: 1616630796001 (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

Details eJournal Action Log Ready to Close

Signers (2)

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

Documents (15)

#	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's Annual Federal Tax Return Information	1	1	✓

Preview Mode ON

DELL



ATTENTION: ***NEVER*** turn off *Preview Mode* ahead of the closing date. When the clock hits 0, *Preview Mode* will automatically turn off.



Documents Section

The Documents area includes all the documents to be executed. To view, you can click on the title of the document.

The screenshot displays the DocMagic eClose Console interface for a Settlement Agent. The top navigation bar includes the DocMagic logo, the text "eClose Console (Settlement Agent)", and the user name "Sally".

Key sections include:

- 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:** 0 Days, 6 Hours, 51 Minutes, 26 Seconds. Date: Mar 25, 2021 (Thu), Time: 12:00am PDT.
- Signers (2):** A table listing signers with columns for Signer Name / Email, Role, Notary Name / Email, Notary Type / Closing Date - Time, KBA / Status, ID Verify / Status, Status, and eSign.
- Documents (15):** A table listing documents with columns for #, eSign Enabled, Page(s), Signer(s), and Completed.

#	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@exampl...	Settlement Agent	Unassigned				● Ready to Sign	Open Signing Room

#	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	✓



Documents Section

eSign Enabled lists all the documents enabled for electronic signature in the package.

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

Details | eJournal | Action Log | Ready to Close

Signers (2)

#	Signer Name / Email	Role	Notary Name / Email	Notary Type / Closing Date - Time	KBA / Stat	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@exampl...	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	✓



Documents Section

At the bottom, "Print and Sign" lists all the documents in the package that require a wet signatures from the borrowers.

The screenshot shows the DocMagic eClose Console interface. At the top, it displays the DocMagic logo and the user's name, Sally. The main content area is a table of documents. A green box highlights the 'Print and Sign' section at the bottom of the table, which lists documents that require wet signatures.

#	Document Name	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	✓
7	California Fair Lending Notice	1	1	✓
8	California Private Mortgage Insurance Notice	2	1	✓
9	Closing Disclosure	5	1	✓
10	IVES Request for Transcript of Tax Return	2	1	✓
11	Initial Amortization Schedule	8	0	✓
12	Initial EscNew Account Disclosure Statement	2	1	✓
13	PMI Initial Disclosure - Fixed	2	1	✓
14	Signature Affidavit and AKA Statement	2	2	✓
# Print and Sign				
1	Multistate Fixed Rate Note	3/3	1	✓

© Copyright 2021 DocMagic, Inc. - ALL RIGHTS RESERVED

Home Contact Privacy Policy Terms of Use

DELL



Adding Documents

Click on this document button to add settlement documents to the package.

The screenshot displays the DocMagic eClose Console interface for a settlement agent. The top navigation bar includes the DocMagic logo, the text "eClose Console (Settlement Agent)", and a user profile for "Sally".

Key sections of the interface include:

- LOAN** section: Loan # 777-1616630796081, Primary Borrower: Erica Sample, Type: EClosing, Package ID: 333727, Worksheet #: 1616630796081 (Version: 1).
- LENDER** section: Company: DSI TEST LENDER (SALES), Contact: Michael Morford, Email: mikem@docmagic.com, Phone: (800) 649-1362.
- COUNTDOWN TO CLOSING** section: A digital timer showing 0 days, 6 hours, 51 minutes, and 26 seconds. Date: Mar 25, 2021 (Thu), Time: 12:00am PDT.
- Signers (2)** table:

#	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	<input type="button" value="Open Signing Room"/>
2	Sally Settlement sally.settlement@examp	Settlement Agent	Unassigned				● Ready to Sign	<input type="button" value="Open Signing Room"/>

Below the signers table is a **Documents (15)** section with a document icon button highlighted by a green box. The document list includes:

#	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	✓



Adding Documents

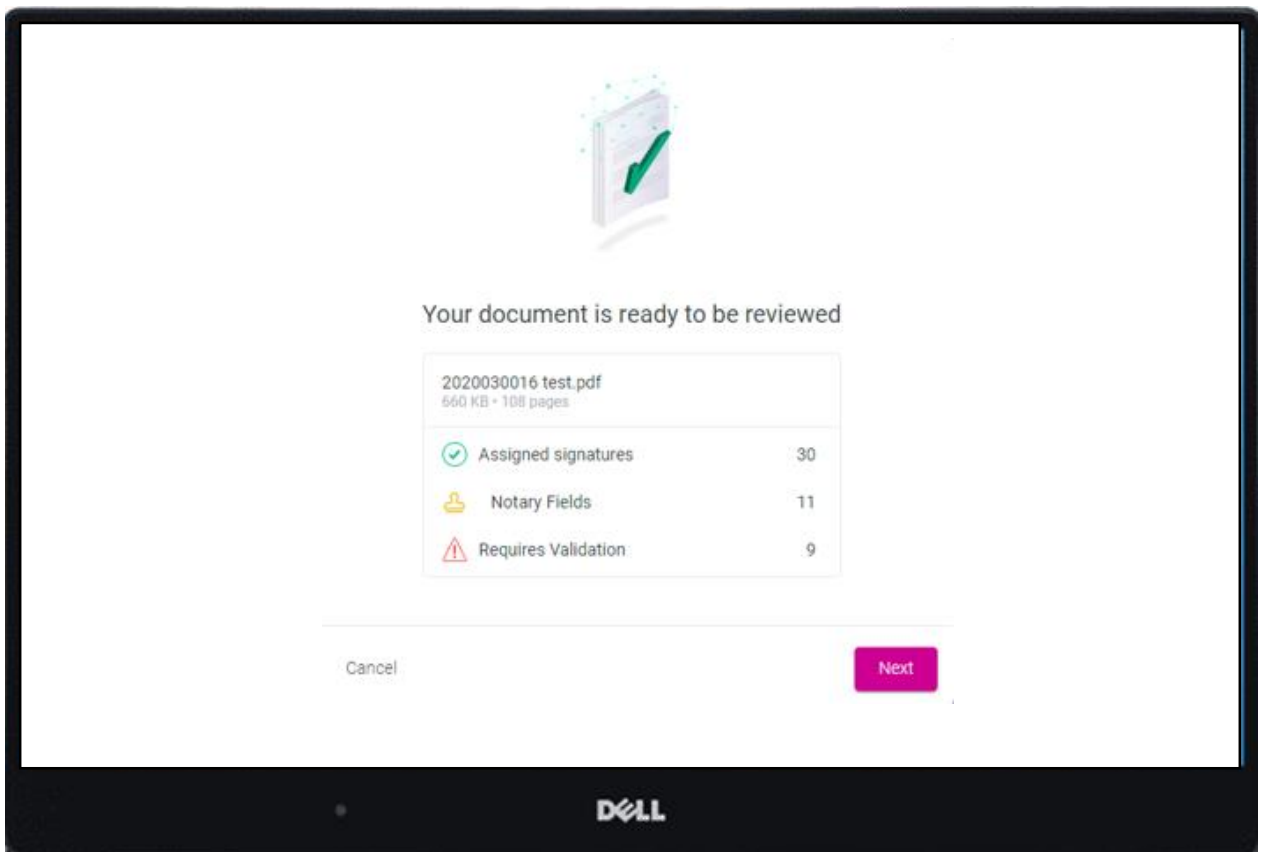
Click the Browse button to navigate to the document you would like to add to the package.

The screenshot displays the DocMagic eClose Console interface. At the top, the user is logged in as 'Sally'. The main area is divided into sections for '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), and a 'COUNTDOWN TO CLOSING' timer showing 0 days, 6 hours, 51 minutes, and 26 seconds. A 'Ready to Close' button is visible. Below these, there are buttons for 'Assign Notary', 'Open Signing Room', and 'Ready to Sign'. A file selection dialog box is open, showing the 'Desktop' folder with a list of files. The file 'AZACPRS.TTL.pdf' is selected. A green box highlights the 'Browse' button in the dialog, with a blue arrow pointing from the text box above to it. The dialog box also shows 'File name: AZACPRS.TTL.pdf' and 'All Files (*.*)' in the file type dropdown. The background interface shows a table of documents with columns for 'Verify / Status', 'Status', and 'eSign', with rows for 'California Hazard Insurance Disclosure', 'Hazard Insurance Authorization and Requirements', and 'Borrower Consent to the Use of Tax Return Information'.



AutoPrep

When the document is uploaded, it activates AutoPrep to check for and assign signatures, date boxes, and any Post-fill boxes needed.



AutoPrep uses A.I. and machine learning to prepare documents for signature.



Creating Signing Boxes via AutoPrep

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

The screenshot shows a document titled "APPRAISAL DELIVERY WAIVER" with two checkboxes. Below the checkboxes is a dropdown menu with the following options: "Unassigned", "Sammy Sample Borrower 1", "Sally Sample Borrower 2", "To be determined Notary", and "Belinda Helmick Settlement Agent". Below the dropdown is another "Unassigned" dropdown. A red callout bubble with a signature icon points to the "Unassigned" dropdown. A green callout bubble with a checkmark and the number "2" points to the "Sally Sample Borrower 2" option. A red callout bubble with a warning triangle and the number "2" points to the "Unassigned" dropdown. The document also includes an "ACKNOWLEDGMENT OF INTENT" section with a list of bullet points and a signature line for "Borrower SALLY SAMPLE".

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



AutoPrep

You have the option to correct the signature mark or choose 'Not needed for this transaction.' This will help the AI compute this accurately next time.

A notary public or other officer completing this certificate verifies only the identity of the individual who signed the document to which this certificate is attached, and not the truthfulness, accuracy, or validity of that document.

State of _____
County of _____

Subscribed and sworn to (or affirmed) before me on this _____ day of _____
by John Smith

providing _____
providing _____
proved to me on the basis of satisfactory evidence to be the person(s) who _____

Why are you deleting this signature mark?

- Not a signature mark
- Not needed for this transaction

Cancel Delete

DELL



AutoPrep

The borrower will be highlighted in green

The screenshot displays a DocMagic document titled "2020030016 test.pdf". The document text includes a standard loan agreement clause: "The undersigned Borrower(s) do hereby so agree and covenant in order to assure that this loan documentation executed this date will conform and be acceptable in the marketplace in the instance of transfer, sale or conveyance by Lender of its interest in and to said loan documentation, and to assure marketable title in the said Borrower(s). DATED this 24th day of April, 2020." Below this, there is a dropdown menu for the borrower, currently showing "Terry M Mackey (Borrower 1)". A green callout bubble with a pencil icon points to this dropdown. Below the dropdown is the text "- BORROWER - Terry M Mackey - DATE -". Further down, there are fields for "State of _____" and "County of _____". The text "This instrument was acknowledged before me on _____ by Terry M Mackey." is followed by a dropdown menu for the notary, currently showing "Notary". A blue callout bubble with a pencil icon points to this dropdown. Below the notary dropdown is the text "Notary Public" and "My Commission Expires: _____". A plus sign icon is located to the right of the commission expires field. The Dell logo is visible at the bottom of the screen.

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



AutoPrep

Blank fields can be populated with signature lines, initials, checkboxes, dates, and notary texts

The screenshot displays the DocMagic AutoPrep interface for a document titled "2020030016 test.pdf". The document text includes a standard loan agreement clause and a date field: "DATED this 24th day of April, 2020." Below this, there is a dropdown menu for the borrower, currently set to "Terry M Mackey (Borrower 1)", with a callout icon. The text continues with "BORROWER - Terry M Mackey - DATE -", followed by "State of _____" and "County of _____". The next line reads "This instrument was acknowledged before me on _____ by Terry M Mackey.", with a callout icon. Below this is a dropdown menu for the notary, currently set to "Notary", with a callout icon. The text continues with "Notary Public" and "My Commission Expires: _____". A plus sign icon is located at the bottom right of the document area, with a callout icon. The Dell logo is visible at the bottom center of the interface.

A user can fill out blank fields by clicking the plus



AutoPrep

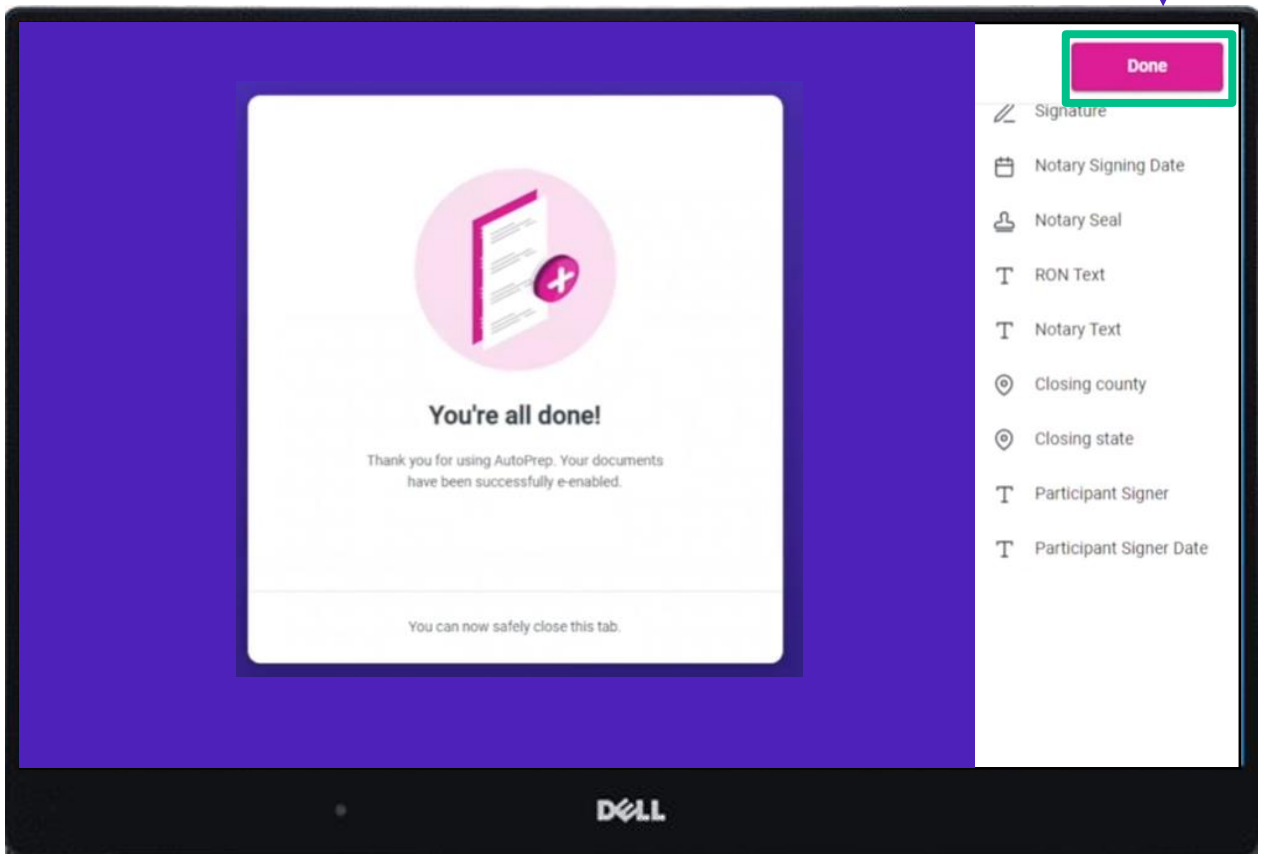
The user is responsible for verifying the correct signer and fields

The screenshot shows a legal document preparation interface. The document text includes: "The undersigned Borrower(s) do hereby so agree and covenant in order to assure that this loan documentation executed this date will conform and be acceptable in the marketplace in the instance of transfer, sale or conveyance by Lender of its interest in and to said loan documentation, and to assure marketable title in the said Borrower(s). DATED this 24th day of April, 2020." Below this, there are input fields for "Borrower" (Terry Mackey (Borrower 1)), "State of", and "County of". A signature line reads "This instrument was acknowledged before me on _____ by Terry M Mackey." Below the signature line are fields for "Notary" (Notary Public) and "My Commission Expires:". On the right side, there is a pink "Done" button and a checklist with the following items: Signature, Notary Signing Date, Notary Seal, RON Text, Notary Text, Closing county, Closing state, Participant Signer, and Participant Signer Date. A green box highlights the checklist items. Blue callout boxes with arrows point to the "Borrower" field, the "State of" field, the "Notary" field, and the "My Commission Expires" field. A purple arrow points from the text box above to the "Notary Signing Date" item in the checklist.



AutoPrep

When the documents are finalized, click done. You will see the confirmation message below.



Settlement Agent Portal – Post AutoPrep

After clicking Done, you will be returned to the Settlement Agent portal.

The screenshot displays the DocMagic eClose Console (Settlement Agent) interface. At the top, the user is logged in as Sally. The main content area is divided into several sections:

- 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:** A digital timer showing 0 days, 6 hours, 51 minutes, and 26 seconds. Date: Mar 25, 2021 (Thu), Time: 12:00am PDT.
- Signers (2):** A table listing signers with columns for Signer Name / Email, Role, Notary Name / Email, Notary Type / Closing Date - Time, KBA / Status, ID Verify / Status, Status, and eSign. Two signers are listed: Erica Sample (Borrower) and Sally Settlement (Settlement Agent).
- Documents (15):** A table listing documents with columns for #, eSign Enabled, Page(s), Signer(s), and Completed. Six documents are listed, all with checkmarks in the Completed column. A green box highlights this table.

#	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_placeholde NOTARY_EMAIL_PLACE...	3/25/2021 - 12:00am			● Not Started	Open Signing Room
2	Sally Settlement sally.settlement@exampl...	Settlement Agent	Unassigned				● Ready to Sign	Open Signing Room

#	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	✓

Hit refresh and your AutoPrep document will now be listed in the documents section.



Edit AutoPrep Documents

To edit an existing document using AutoPrep, select a document then click on the pencil.

The screenshot displays the DocMagic eClose Console (Settlement Agent) interface. At the top, the user is logged in as Sally. The main dashboard includes sections for LOAN, LENDER, and a COUNTDOWN TO CLOSING timer showing 0 days, 6 hours, 51 minutes, and 26 seconds. Below these are tabs for Details, eJournal, and Action Log. The Signers (2) section lists Erica Sample (Borrower) and Sally Settlement (Settlement Agent). The Documents (15) section is highlighted, showing a list of documents with a pencil icon for editing. The Dell logo is visible at the bottom of the screen.

#	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	✓



Edit AutoPrep Documents

You can add signatures, initials, post-fill boxes and notary information.

The screenshot displays the EClosing software interface. At the top, the header reads "EClosing Prepare documents for signing" with a "Done" button on the right. A dark navigation bar contains four editing tools: "Add Signature", "Add Initial", "Add Postfill", and "Add Notary Seal". A green box highlights these tools, with a purple arrow pointing from the text above to the "Add Signature" icon. The main content area shows a "Closing Disclosure" form. The form includes sections for Closing Information, Transaction Information, Loan Information, Loan Terms, Monthly Principal & Interest, Prepayment Penalty, Balloon Payment, and Projected Payments. A sidebar on the left shows a list of document thumbnails, with the first one selected. The Dell logo is visible at the bottom center of the interface.

Closing Information		Transaction Information		Loan Information	
Date Issued	6/4/2021	Borrower	John Smith 222333 Peachtree Place Atlanta, GA 30318	Loan Term	30 years
Closing Date	6/4/2021			Purpose	Purchase
Disbursement Date	6/4/2021			Product	Fixed Rate
Settlement Agent	Settlement Closing Company	Seller	Steve Seller 2127 Adams Dr NW Atlanta, GA 30318	Loan Type	<input checked="" type="checkbox"/> Conventional <input type="checkbox"/> FHA <input type="checkbox"/> VA <input type="checkbox"/>
File #				Loan ID #	1622818945601
Property	2127 Adams Dr NW Atlanta, GA 30318	Lender	Sample Sons Lending	MIC #	
Sale Price	\$180,000				

Loan Terms	Can this amount increase after closing?	
Loan Amount	\$162,000	NO
Interest Rate	3.875%	NO
Monthly Principal & Interest <small>See Projected Payments below for your Estimated Total Monthly Payment</small>	\$761.78	NO

Does the loan have these features?	
Prepayment Penalty	NO
Balloon Payment	NO

Projected Payments	Years 1 - 7	Years 8 - 30
Payment Calculation		
Principal & Interest	\$761.78	\$761.78



Edit AutoPrep Documents

When finished, click "Done" to return to the portal.

EClosing
Prepare documents for signing

Done

Add Signature AA Add Initial T Add Postfill Add Notary Seal

Closing Disclosure

This form is a statement of final loan terms and closing costs. Compare this document with your Loan Estimate.

Closing Information		Transaction Information		Loan Information	
Date Issued	6/4/2021	Borrower	John Smith 222333 Peachtree Place Atlanta, GA 30318	Loan Term	30 years
Closing Date	6/4/2021			Purpose	Purchase
Disbursement Date	6/4/2021			Product	Fixed Rate
Settlement Agent	Settlement Closing Company	Seller	Steve Seller 2127 Adams Dr NW Atlanta, GA 30318	Loan Type	<input checked="" type="checkbox"/> Conventional <input type="checkbox"/> FHA <input type="checkbox"/> VA <input type="checkbox"/>
File #				Loan ID #	1622818945601
Property	2127 Adams Dr NW Atlanta, GA 30318	Lender	Sample Sons Lending	MIC #	
Sale Price	\$180,000				

Loan Terms		Can this amount increase after closing?	
Loan Amount	\$162,000		NO
Interest Rate	3.875%		NO
Monthly Principal & Interest <small>See Projected Payments below for your Estimated Total Monthly Payment</small>	\$761.78		NO

Prepayment Penalty		Does the loan have these features?	
			NO
Balloon Payment			NO

Projected Payments		
Payment Calculation	Years 1 - 7	Years 8 - 30
Principal & Interest	\$761.78	\$761.78

MULTISTATE
FIXED RATE
ELECTRONIC
NOTE

DELL



eJournal

The eJournal tab is only used for Hybrid 3 and Total eClose.

Click on this tab to access the eJournal.

The screenshot displays the DocMagic eClose Console interface for a Settlement Agent. The top navigation bar includes the DocMagic logo, the text "eClose Console (Settlement Agent)", and a user profile icon labeled "Doc". Below the navigation bar, there are four main sections: "LOAN", "LENDER", "SETTLEMENT AGENT", and "COUNTDOWN TO CLOSING". The "LOAN" section shows details for Loan # 163648191601, Primary Borrower John Smith, Type EClosing, Package ID 417659, and Worksheet # 163648191601 (...). The "LENDER" section shows Company SAMPLE SONS L..., Contact Michael Morford, Email mikem@docmagic..., and Phone (555) 555-5555. The "SETTLEMENT AGENT" section shows Company Settlement Closing..., Contact Sally Settlement, Email struitt@docmagic.c..., and Phone (987) 555-4321. The "COUNTDOWN TO CLOSING" section shows a timer for 0 days, 1 hour, 26 minutes, and 43 seconds, with Date Nov 9, 2021 (Tue) and Time 12:00pm PST. Below these sections, there are three tabs: "Details", "eJournal" (highlighted with a green box), and "Action Log". The "eJournal" tab is selected, and a blue arrow points to it from the text above. The "Journal" section shows a table with one entry: # 1, Signer John Smith, Notarization Date and Time November 9, 2021 • 10:32am PST. A green box highlights a down arrow icon in the right column of this entry, with a blue arrow pointing to it from the text below. The "Recordings" section shows a table with one entry: # 1, File 417659_2021-11-09T18:27:54.132Z.mp4, Date Recorded November 9, 2021 • 10:27am PST, and a download icon. The Dell logo is visible at the bottom of the screen.

Click on the down arrow to look at the borrower's journal.
Note: the eJournal is **read-only** for the Settlement Agent.



Action Log

The Action Log is only used for Hybrid 3 and Total eClose.

Click here to see the Action Log. This tab shows the actions that everyone involved in the process has taken, and when.

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: 42 SECONDS: 12
Date: Mar 25, 2021 (Thu) Time: 12:00am PDT

Details eJournal **Action Log**

Date & Time (PST)	User Name	IP Address	Description
3/24/21 5:06 PM	System User		eSign event created
3/24/21 5:06 PM	Erica Sample		Invitation sent to erica.sample@example.com
3/24/21 5:06 PM	Sally Settlement		Invitation sent to sally.settlement@example.com
3/24/21 5:11 PM	System User		Date: 2021-03-24 17:11:04 InkSign Fax received for document: 3596363 ()
3/24/21 5:11 PM	Erica Sample		Multistate Fixed Rate Note signed by Erica Sample
3/24/21 5:12 PM	Sally Settlement	172.16.1.98	Document AZACPRS.TTL.pdf added to package

Add Internal Note To Action Log

You may also add notes at the bottom.



Print/Download Documents

Printer Icon allows you to download documents that require wet signatures.

The screenshot displays the DocMagic eClose Console interface for a Settlement Agent. The top navigation bar includes the DocMagic logo, 'eClose Console', the user role 'Settlement Agent', and the user name 'Sally'. The main content area is divided into several sections:

- LOAN:** Loan #: 777-16196307990, Primary Borrower: Erica Sample, Type: EClosing, Package ID: 333727, Worksheet #: 1619630796081 (Version: 1).
- LENDER:** Company: DSI TEST LENDER (SALES), Contact: Michael Morford, Email: mikam@docmagic.com, Phone: (800) 649-1362.
- COUNTDOWN TO CLOSING:** A timer showing 0 days, 6 hours, 51 minutes, and 26 seconds, with a date of Mar 25, 2021 (Thu) and time of 12:00am PDT.
- Signers (2):** A table listing signers with columns for Signer Name / Email, Role, Notary Name / Email, Notary Type / Closing Date - Time, KBA / Status, ID Verify / Status, Status, and eSign options. Two signers are listed: Erica Sample (Borrower, Not Started) and Sally Settlement (Settlement Agent, Ready to Sign).
- Documents (15):** A table listing documents with columns for #, eSign Enabled, Page(s), Signer(s), and Completed. A green box highlights a printer icon in the toolbar above this table.

#	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_placeholde... NOTARY_EMAIL_PLACE...	3/25/2021 - 12:00am			● Not Started	Open Signing Room
2	Sally Settlement sally.settlement@exampl...	Settlement Agent	Unassigned				● Ready to Sign	Open Signing Room

#	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	✓

PDF Icon allows you to download and print *all* the documents – not always necessary, just an option



Wet-sign Options

Upload signed and scanned documents here.

The screenshot displays the DocMagic eClose Console interface. On the left, the 'Documents (15)' section lists various documents, with a green box highlighting the upload icon. On the right, a red-bordered box contains the following text:

IMPORTANT

YOU MUST USE THIS AS YOUR COVER SHEET.

DO NOT WRITE ON THIS FORM.
Messages or notes written on this form are discarded and will not be read.

INSTRUCTIONS

- 1. Print this document**
If you are viewing this on a mobile device, use "share" options to either print it from your device or email it to yourself then print it from a computer.
- 2. Carefully review and sign each document**
- 3. Return the document**
 - a) From the LoanMagic App
 - Go
 - Navigate to the document that requires an ink signature
 - Press the "Scan" button and follow the onscreen instructions.
 - or -
 - b) From the eSign website
 - Scan signed documents to PDF file.
 - Use Upload link within eSign session and follow on-screen prompts.
 - or -
 - c) Using a fax machine
 - FAX to 1-866-420-1583

Below the instructions, a QR code is shown with a green box around it. The QR code is labeled with the number 75605744-1. A blue arrow points from the QR code to the bottom text box.

The QR Code on each page will place the signed documents in the right order in the stack.



Wet-sign Options

Completed wet signed documents will show up at the bottom with a green checkmark.

The screenshot displays the DocMagic eClose Console interface for a Settlement Agent named Sally. The main content area shows a list of 14 documents, each with a number, title, page count, and number of signers. A green arrow points from the text above to the bottom of the list. Below the list, a summary table is highlighted with a green border, showing the total number of documents, pages, signers, and completed status.

#	Print and Sign	Page(s)	Signer(s)	Completed
1	Multistate Fixed Rate Note	3/3	1	✓

© Copyright 2021 DocMagic, Inc. - ALL RIGHTS RESERVED

Home Contact Privacy Policy Terms of Use

DELL



Assign a Notary

Click this button to start the process of assigning a notary.

The screenshot displays the DocMagic eClose Console interface for a Settlement Agent. The top navigation bar includes the DocMagic logo, the text 'eClose Console (Settlement Agent)', and a user profile for 'Sally'. The main content area is divided into several sections:

- LOAN**: Displays Loan # 777-1616630796081, Primary Borrower: Erica Sample, Type: eClosing, Package ID: 333727, and Worksheet #: 1616630796081 (Version: 1).
- LENDER**: Displays Company: DSI TEST LENDER (SALES), Contact: Michael Morford, Email: mikem@docmagic.com, and Phone: (800) 649-1362.
- COUNTDOWN TO CLOSING**: Shows 0 Days, 6 Hours, 41 Minutes, and 17 Seconds. Date: Mar 25, 2021 (Thu), Time: 12:00am PDT.
- Buttons**: Includes 'Details', 'eJournal', 'Action Log', 'Ready to Close', and a highlighted 'Assign Notary' button.
- Signers (2)**: A table listing two signers: Erica Sample (Borrower) and Sally Settlement (Settlement Agent). The 'Assign Notary' button is highlighted in the table's 'eSign' column for the Settlement Agent.
- Documents (16)**: A table listing documents such as 'Uniform Residential Loan Application', 'MERS California Deed of Trust', and 'Specific Closing Instructions'.

#	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_placeholde... NOTARY_EMAIL_PLACE...	3/25/2021 - 12:00am			● Not Started	Open Signing Room
2	Sally Settlement sally.settlement@exampl...	Settlement Agent	Unassigned				● Ready to Sign	Open Signing Room

#	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	✓

Note: This is only applicable for closing types with eNotary enabled – Hybrid 3 and Total eClose.



Assign a Notary

For a Hybrid 3 or Total eClose, select Remote Online Notary for Notary Type.

The screenshot displays the DocMagic eClose Console interface. A modal window titled "Assign / Notify Notary" is open, showing the following details:

- Notary Provider:** NotaryCam
- Notary Type:** Remote Online Notary (selected)
- Signers (2):**

#	Signer Name / Email	Name	Email	Role	Phone
1	Erica Sample erica.sample@exam...	Erica Sample	erica.sample@exam...	Borrower	Home: (800) 649-1362
2	Sally Settlement sally.settlement@ex...				
- Request Summary:** 1 participants for a RON eClosing for a property in Torrance, CA.
 - Estimate Closing Date:** 3/25/2021
 - Time:** 12:00 AM
 - Location:** America/Los Angeles

Buttons for "Cancel" and "Assign Notary" are visible at the bottom of the modal. The background interface shows a "TO CLOSING" timer (6 hours, 41 minutes, 17 seconds) and a list of 16 documents.



Assign a Notary

If you select *NotaryCam* as your Notary Provider, you will only need to set the closing date and time.

The screenshot displays the 'Assign / Notify Notary' dialog box within the DocMagic eClose Console. The dialog is titled 'Assign / Notify Notary' and features a close button (X) in the top right corner. It is divided into several sections:

- Notary Provider:** A dropdown menu with 'NotaryCam' selected. This section is highlighted with a green box.
- Notary Type:** A required field with two radio button options: 'In Person' and 'Remote Online Notary'. 'Remote Online Notary' is selected.
- Signers:** A table listing the participants in the closing.
- Request Summary:** A section highlighted with a green box, containing the text '1 participants for a RON eClosing for a property in Torrance, CA.' and fields for 'Estimate Closing Date' (3/25/2021), 'Time' (12:00 AM), and 'America/Los Angeles'.
- Buttons:** 'Cancel' and 'Assign Notary' buttons are located at the bottom of the dialog. The 'Assign Notary' button is highlighted with a green box.

The background of the screenshot shows the main console interface, including a 'TO CLOSING' timer (6 hours, 41 minutes, 17 seconds) and a list of documents (16 total) with their respective eSign statuses.

Click "Assign Notary" when done.



Assign a Notary

If you select *DocMagic RON* as your Notary Provider, a different window (shown below) will appear.

Assign / Notify Notary

***Notary Provider**
DocMagic RON

***Notary Type**
 In Person
 Remote Online Notary (RON)

Search

Company Name	First Name	Last Name	Client ID
<input type="text"/>	<input type="text"/>	<input type="text"/>	TEST

City: County: State: MD Zip: RON Capable

	Signers	Notaries
<input type="radio"/>	DOCMAGIC NOTARY emily@docmagic.com	emily@docmagic... Yes Yes
<input type="radio"/>	DOCMAGIC NOTARY eugener@docmagic.com	eugener@docmag... Yes Yes
<input checked="" type="radio"/>	DOCMAGIC NOTARY struitt@docmagic.com	struitt@docmagic... Yes Yes
<input type="radio"/>	DOCMAGIC NOTARY alexh@docmagic.com	alexh@docmagic... Yes Yes
<input type="radio"/>	DOCMAGIC NOTARY dmitri@docmagic.com	dmitri@docmagic... Yes Yes

Request Summary

1 participants for a RON eClosing for a property in Sample, NJ.

*Estimate Closing Date: 12/21/2022 *Time: 01:00 PM America/Los Angeles

Start by entering your search parameters for a DocMagic Remote Online Notary and hit Search. Please note that entering too many search parameters will limit the results that appear.



Assign a Notary

Select your notary from the results that appear by clicking the bubble next to their name.

The screenshot displays the 'Assign / Notify Notary' window in the DocMagic eClose system. The window is divided into several sections:

- Loan Information:** Loan #: 777-1, Primary Borrower: Erica, Type: EClose, Package ID: 3337, Worksheet #: 1616.
- Search Form:** Includes fields for Company Name, First Name, Last Name, Client ID (TEST), City, County, State (MD), and Zip. A 'Search' button is present.
- Notary Type:** Radio buttons for 'In Person' and 'Remote Online Notary (RON)' (selected).
- Search Results Table:** A table with columns for Notary Name, Email, and status. The third row is selected with a radio button.
- Request Summary:** Shows '1 participants for a RON eClosing for a property in Sample, NJ.' and fields for 'Estimate Closing Date' (12/21/2022), 'Time' (01:00 PM), and 'America/Los Angeles'.

Notary Name	Email	Yes	Yes
DOCMAGIC NOTARY emily@docmagic.com	emily@docmagic...	Yes	Yes
DOCMAGIC NOTARY eugener@docmagic.com	eugener@docmag...	Yes	Yes
<input checked="" type="radio"/> DOCMAGIC NOTARY struitt@docmagic.com	struitt@docmagic...	Yes	Yes
DOCMAGIC NOTARY alexh@docmagic.com	alexh@docmagic...	Yes	Yes
DOCMAGIC NOTARY dmitri@docmagic.com	dmitri@docmagic...	Yes	Yes

Please note that you can scroll down to see more results.



Assign a Notary

Scroll down to Request Summary and select your estimated closing date, time (including AM/PM), and time zone.

Assign / Notify Notary

***Notary Provider**
DocMagic RON

***Notary Type** **Required*
 In Person
 Remote Online Notary (RON)

Search

Company Name	First Name	Last Name	Client ID
			TEST
City	County	State	Zip
		MD	

RON Capable

Signers **Notaries**

<input type="radio"/>	DOCMAGIC NOTARY emily@docmagic.com	emily@docmagic...	Yes	Yes
<input type="radio"/>	DOCMAGIC NOTARY eugener@docmagic.com	eugener@docmag...	Yes	Yes
<input checked="" type="radio"/>	DOCMAGIC NOTARY struitt@docmagic.com	struitt@docmagic...	Yes	Yes
<input type="radio"/>	DOCMAGIC NOTARY alexh@docmagic.com	alexh@docmagic...	Yes	Yes
<input type="radio"/>	DOCMAGIC NOTARY dmitri@docmagic.com	dmitri@docmagic...	Yes	Yes

Request Summary

1 participants for a RON eClosing for a property in Sample, NJ.

*Estimate Closing Date: 12/21/2022 *Time: 01:00 PM America/Los Angeles

Click "Request Notary Services" when done.



Ready to Close

Once all the documents have been uploaded and prepared for execution, click on "Ready to Close" to alert the Notary, if a Remote Online Notary is required.

The screenshot displays the DocMagic eClose Console interface for a Settlement Agent. The top navigation bar includes the DocMagic logo, the text "eClose Console (Settlement Agent)", and a user profile for "Sally".

Key sections of the interface include:

- 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:** A digital timer showing 0 days, 6 hours, 41 minutes, and 17 seconds. Date: Mar 25, 2021 (Thu), Time: 12:00am PDT.
- Buttons:** "Ready to Close" (highlighted with a red box and an arrow from the text box), "NotaryCam", and "Notify".
- Signers (2):** A table listing signers with their roles and statuses.
- Documents (16):** A table listing documents with their page counts and completion status.

#	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_placeholde... NOTARY_EMAIL_PLACE...	3/25/2021 - 12:00am			● Not Started	Open Signing Room
2	Sally Settlement sally.settlement@exampl...	Settlement Agent	Unassigned				● Ready to Sign	Open Signing Room

#	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	✓

Note: This is only applicable for closing types with eNotary enabled – Hybrid 3 and Total eClose.



Preview Mode Off

Preview Mode will turn off automatically when the Clock hits Zero and signing begins. To be safe, check that Preview Mode is off the day of signing.

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: 41 SECONDS: 17
Date: Mar 25, 2021 (Thu) Time: 12:00am PDT

Signers (2)

#	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_placeholde... NOTARY_EMAIL_PLACE...	3/25/2021 - 12:00am	✉ ○	📄 ○	● Not Started	Open Signing Room
2	Sally Settlement sally.settlement@exempl...	Settlement Agent	Unassigned				● Ready to Sign	Open Signing Room

Documents (16)

#	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	✓

Preview Mode off



Your Turn to Sign

The Settlement Agent can eSign by clicking on the Open Signing Room Button.

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: 41 SECONDS: 17
Date: Mar 25, 2021 (Thu) Time: 12:00am PDT

Ready to Close

Signers (2)

#	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_placeholde... NOTARY_EMAIL_PLACE...	3/25/2021 - 12:00am	✉️ ⓪	📄 ⓪	● Finished	Open Signing Room
2	Sally Settlement sally.settlement@exempl...	Settlement Agent	Unassigned				● Ready to	Open Signing Room

Documents (16)

#	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	✓

Preview Mode ON

DELL



eClose Console Confirmation

When all signed documents have been uploaded and all signatures, fields and Notary stamps have been collected, the Settlement Agent will see a fully completed column on the Right.

DocMagic eClose Console (Settlement Agent) Sally

Documents (16) Preview Mode OFF

#	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	✓
7	California Fair Lending Notice	1	1	✓
8	California Private Mortgage Insurance Notice	2	1	✓
9	Closing Disclosure	5	1	✓
10	IVES Request for Transcript of Tax Return	2	1	✓
11	Initial Amortization Schedule	8	0	✓
12	Initial EscNew Account Disclosure Statement	2	1	✓
13	PMI Initial Disclosure - Fixed	2	1	✓
14	Signature Affidavit and AKA Statement	2	2	✓
15	AZACPRS.TTL.pdf	2	2	✓

Print and Sign Page(s) Signer(s) Completed

