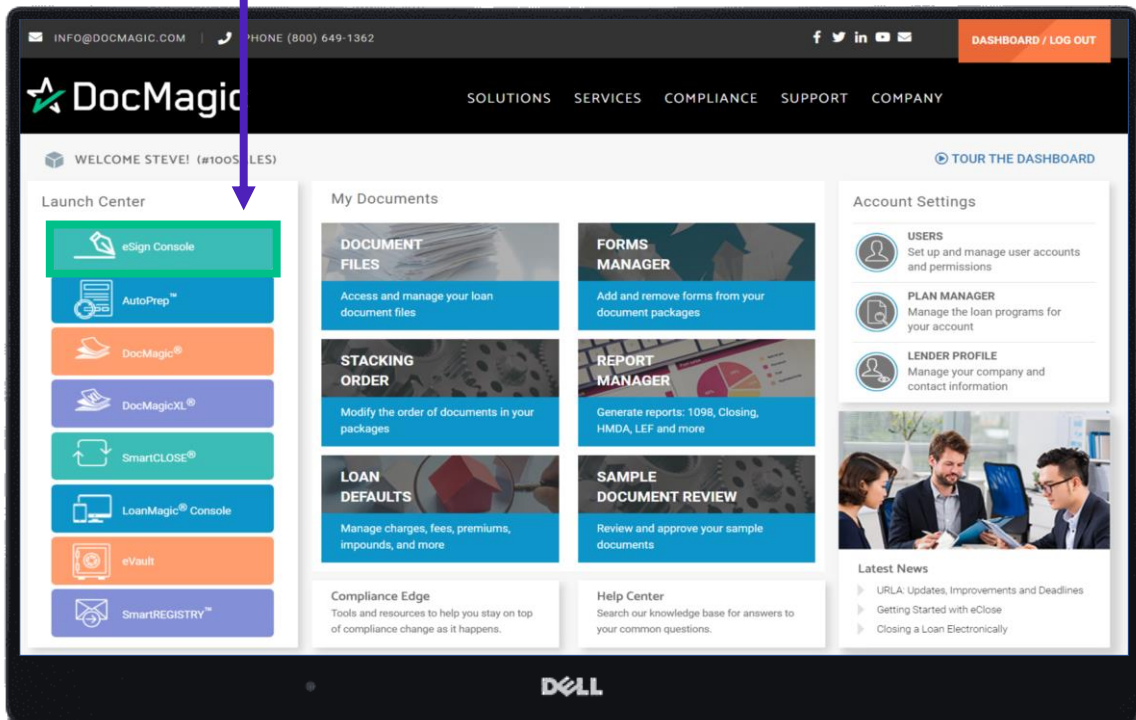# DocMagic

eSign Console
Lender Portal

eSign Console/Lender Portal

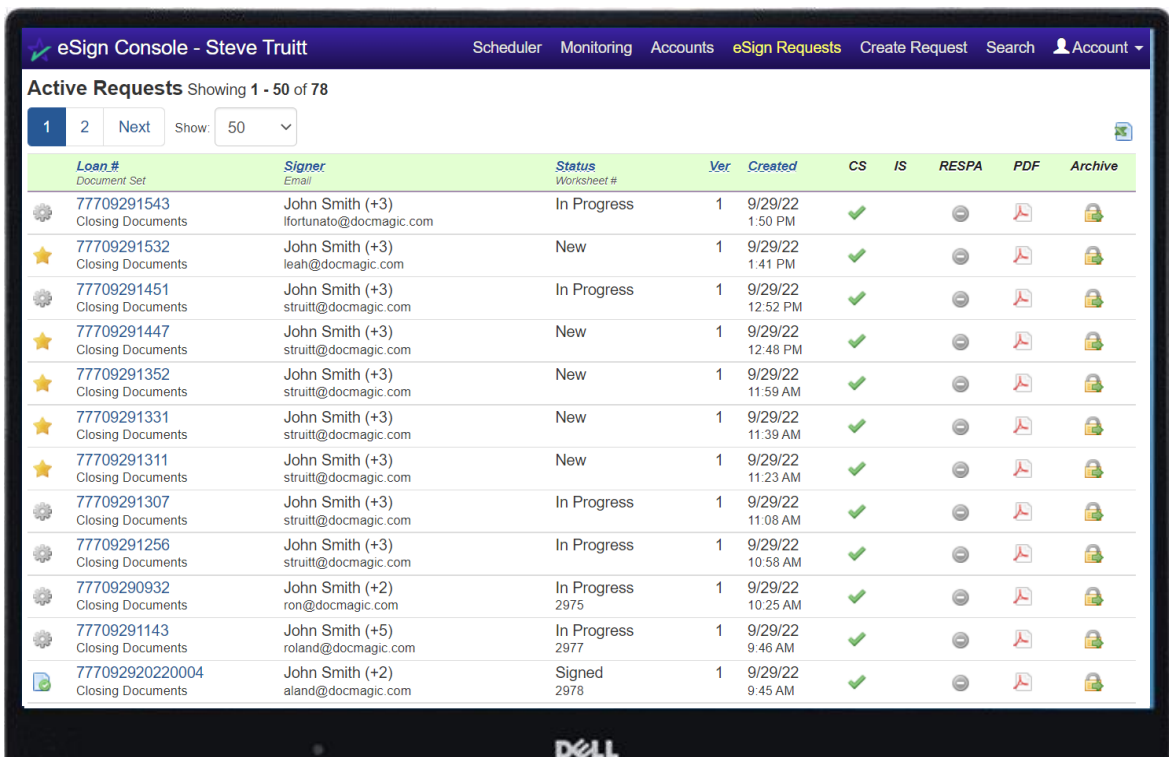## Getting Started

Login to DocMagic and open the eSign Console from the Launch Center.

eSign Console

> You'll be greeted with a list of document sets that have been processed within the past 90 days.

It's crucial that you know that these loan packages will only be present on this console for 90 days after generation. After all signatures are collected, it's a good idea to download all signed documents to your desktop. This will be shown towards the end of the guide.

eSign Console/Lender Portal

Help Button

From the eSign Console, you can find a tutorial just like the one you're reading now. Just click Account, then Help.

eSign Console/Lender Portal

Status Icons

The icons on the left indicate the processing status of the document set. A star indicates that the set has just been processed (new).

The piece of paper with the check mark indicates that the set has been completed and signed.

eSign Console/Lender Portal

Status Icons

The gear icon indicates that the document set is still in progress – there are items that have not been signed yet.

eSign Console - Steve Truitt		Scheduler	Monitoring	Accounts	**eSign Requests**	Create Request	Search	👤 Account ▾	

Active Requests Showing **1 - 50** of **78**

| 1 | 2 | Next | Show: | 50 ▾ | | | | | | | 📊 |

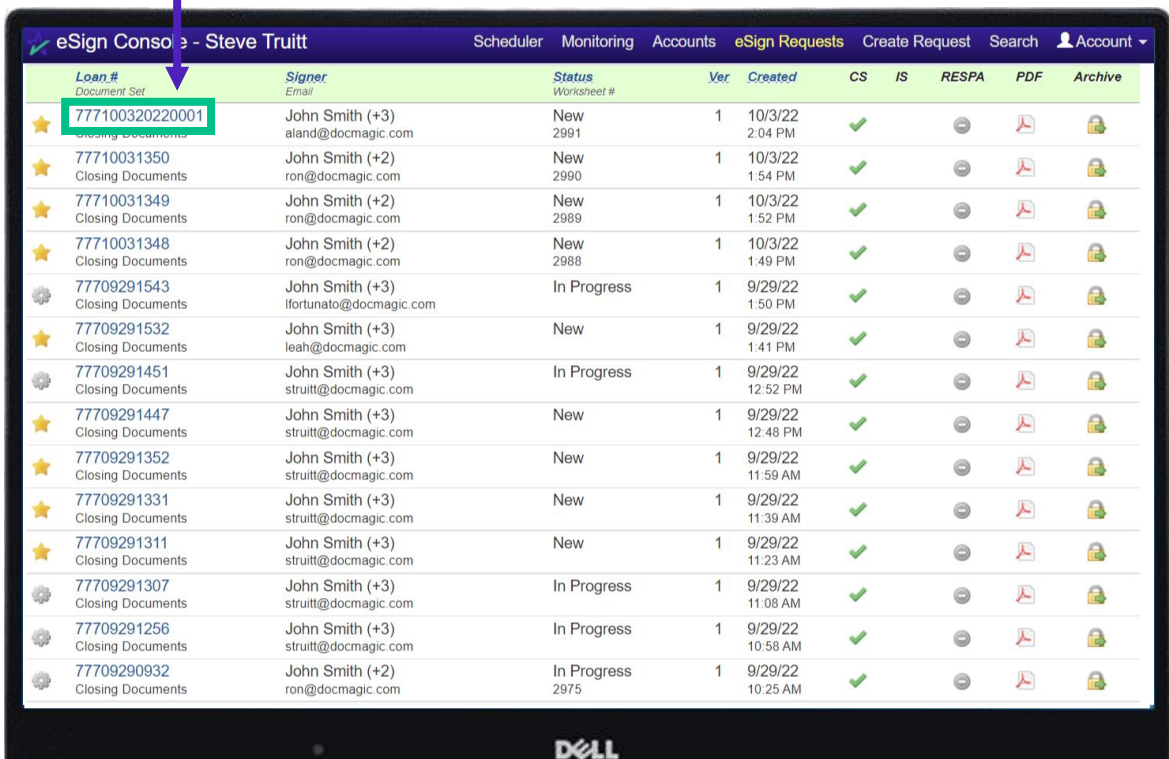| Loan # Document Set	Signer Email	Status Worksheet #	Ver	Created	CS	IS	RESPA	PDF	Archive
⚙️ 77709291543 Closing Documents	John Smith (+3) lfortunato@docmagic.com	In Progress	1	9/29/22 1:50 PM	✔		⊖	📄	🔒
⭐ 77709291532 Closing Documents	John Smith (+3) leah@docmagic.com	New	1	9/29/22 1:41 PM	✔		⊖	📄	🔒
⚙️ 77709291451 Closing Documents	John Smith (+3) struitt@docmagic.com	In Progress	1	9/29/22 12:52 PM	✔		⊖	📄	🔒
⭐ 77709291447 Closing Documents	John Smith (+3) struitt@docmagic.com	New	1	9/29/22 12:48 PM	✔		⊖	📄	🔒
⭐ 77709291352 Closing Documents	John Smith (+3) struitt@docmagic.com	New	1	9/29/22 11:59 AM	✔		⊖	📄	🔒
⭐ 77709291331 Closing Documents	John Smith (+3) struitt@docmagic.com	New	1	9/29/22 11:39 AM	✔		⊖	📄	🔒
⭐ 77709291311 Closing Documents	John Smith (+3) struitt@docmagic.com	New	1	9/29/22 11:23 AM	✔		⊖	📄	🔒
⚙️ 77709291307 Closing Documents	John Smith (+3) struitt@docmagic.com	In Progress	1	9/29/22 11:08 AM	✔		⊖	📄	🔒
⚙️ 77709291256 Closing Documents	John Smith (+3) struitt@docmagic.com	In Progress	1	9/29/22 10:58 AM	✔		⊖	📄	🔒
⚙️ 77709290932 Closing Documents	John Smith (+2) ron@docmagic.com	In Progress 2975	1	9/29/22 10:25 AM	✔		⊖	📄	🔒
⚙️ 77709291143 Closing Documents	John Smith (+5) roland@docmagic.com	In Progress 2977	1	9/29/22 9:46 AM	✔		⊖	📄	🔒
✅ 777092920220004 Closing Documents	John Smith (+2) aland@docmagic.com	Signed 2978	1	9/29/22 9:45 AM	✔		⊖	📄	🔒

DELL

The full checkmark indicates that the document set has been signed and printed.

Opening a Document Set

Click on the loan number to see details about that document set.

	Loan # Document Set	Signer Email	Status Worksheet #	Ver	Created	CS	IS	RESPA	PDF	Archive
★	777100320220001 Closing Documents	John Smith (+3) aland@docmagic.com	New 2991	1	10/3/22 2:04 PM	✔		⊖	�🅿️	🔒
★	77710031350 Closing Documents	John Smith (+2) ron@docmagic.com	New 2990	1	10/3/22 1:54 PM	✔		⊖	�🅿️	🔒
★	77710031349 Closing Documents	John Smith (+2) ron@docmagic.com	New 2989	1	10/3/22 1:52 PM	✔		⊖	⚿	🔒
★	77710031348 Closing Documents	John Smith (+2) ron@docmagic.com	New 2988	1	10/3/22 1:49 PM	✔		⊖	⚿	🔒
⚙	77709291543 Closing Documents	John Smith (+3) lfortunato@docmagic.com	In Progress	1	9/29/22 1:50 PM	✔		⊖	⚿	🔒
★	77709291532 Closing Documents	John Smith (+3) leah@docmagic.com	New	1	9/29/22 1:41 PM	✔		⊖	⚿	🔒
⚙	77709291451 Closing Documents	John Smith (+3) struitt@docmagic.com	In Progress	1	9/29/22 12:52 PM	✔		⊖	⚿	🔒
★	77709291447 Closing Documents	John Smith (+3) struitt@docmagic.com	New	1	9/29/22 12:48 PM	✔		⊖	⚿	🔒
★	77709291352 Closing Documents	John Smith (+3) struitt@docmagic.com	New	1	9/29/22 11:59 AM	✔		⊖	⚿	🔒
★	77709291331 Closing Documents	John Smith (+3) struitt@docmagic.com	New	1	9/29/22 11:39 AM	✔		⊖	⚿	🔒
★	77709291311 Closing Documents	John Smith (+3) struitt@docmagic.com	New	1	9/29/22 11:23 AM	✔		⊖	⚿	🔒
⚙	77709291307 Closing Documents	John Smith (+3) struitt@docmagic.com	In Progress	1	9/29/22 11:08 AM	✔		⊖	⚿	🔒
⚙	77709291256 Closing Documents	John Smith (+3) struitt@docmagic.com	In Progress	1	9/29/22 10:58 AM	✔		⊖	⚿	🔒
⚙	77709290932 Closing Documents	John Smith (+2) ron@docmagic.com	In Progress 2975	1	9/29/22 10:25 AM	✔		⊖	⚿	🔒

eSign Console - Steve Truitt Scheduler Monitoring Accounts eSign Requests Create Request Search 👤 Account ▾

DELL

eSign Console/Lender Portal

Key Info

At the top of the page, you can see the details of the loan, the lender, and the status of the process.

Worksheet Number

> If you have an issue where you need to contact DocMagic's Customer Service department, they'll always ask you for the worksheet number.

eSign Console/Lender Portal

Details

Under the Details tab, you can find Participants and the Action Log. Note that you see can the role of each participant in the second column.

eSign Console - Steve Truitt

Scheduler Monitoring Accounts eSign Requests Create Request Search 👤 Account ▾

Return to Search

Loan #:	77710031350
Primary Name:	John Smith
Type:	EClosing
Package Id:	604282
Worksheet #:	2990 (Version : 1)
Closing Date:	9/30/22

Lender: **Ron Carrillo**
DSI TEST LENDER (SALES) (100SALES)
ron@docmagic.com
(708)531-9060

Status:	**New** (Active)
Documents:	**15** (55 total pages)
Signers:	**3**
Expires:	**N/A** (Requires: Primary)
Signatures:	**Y**

Details | Documents | Documents Received | EMail | Versions

Participants 👤+

Preview Mode - Off

#	Name/Email	Role	Created	Started	Consented	Viewed	Completed	Declined	Links
1	John Smith ron@docmagic.com	Borrower	10/3/22 1:54 PM						✉ Send Email 👓 Sign Documents
3	Andy Agent ron@docmagic.com	Settlement Agent	10/3/22 1:54 PM						✉ Send Email 👓 Agent Portal

Action Log

Date	User	IP Address	Description
10/3/22 1:54 PM	System User		eSign event created
10/3/22 1:54 PM	John Smith		Invitation sent to ron@docmagic.com
10/3/22 1:54 PM	Andy Agent		Invitation sent to ron@docmagic.com

Add Internal Note

Cancel Request | Delete Request

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DELL

The Action Log at the bottom tracks every step taken with this document set.

eSign Console/Lender Portal

Links

Under the Links column on the far right, "Send Email" sends the borrower a reminder email to sign the documents if they have not yet done so.

eSign Console - Steve Truitt

Scheduler   Monitoring   Accounts   eSign Requests   Create Request   Search   Account ▾

Return to Search

Loan #:	77710031350
Primary Name:	John Smith
Type:	EClosing
Package Id:	604282
Worksheet #:	2990 (Version : 1)
Closing Date:	9/30/22

Lender: **Ron Carrillo**
DSI TEST LENDER (SALES) (100SALES)
ron@docmagic.com
(708)531-9060

Status:	**New** (Active)
Documents:	**15** (55 total pages)
Signers:	**3**
Expires:	**N/A** (Requires: Primary)
Signatures:	**Y**

Details   Documents   Documents Received   EMails   Versions

Preview Mode - Off

Participants 👤+

#	Name/Email	Role	Created	Started	Consented	Viewed	Completed	Declined	Links
1	John Smith ron@docmagic.com	Borrower	10/3/22 1:54 PM						✉ Send Email 👓 Sign Documents
3	Andy Agent ron@docmagic.com	Settlement Agent	10/3/22 1:54 PM						✉ Send Email 👓 Agent Portal

Action Log

Date	User	IP Address	Description
10/3/22 1:54 PM	System User		eSign event created
10/3/22 1:54 PM	John Smith		Invitation sent to ron@docmagic.com
10/3/22 1:54 PM	Andy Agent		Invitation sent to ron@docmagic.com

Add Internal Note

Cancel Request   Delete Request

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Sign Documents allows you to open that Participant's signing experience – this assumes that the participant is with you. Selecting Sign Documents opens the customer signing experience in another tab.

If you have a Settlement Agent, you may also enter their agent portal.

eSign Console - Steve Truitt

Scheduler   Monitoring   Accounts   eSign Request   Create Request   Search   Account ▾

Return to Search

Loan #:	77710031350
Primary Name:	John Smith
Type:	EClosing
Package Id:	604282
Worksheet #:	2990 (Version : 1)
Closing Date:	9/30/22

Lender: **Ron Carrillo**
DSI TEST LENDER (SALES) (100SALES)
ron@docmagic.com
(708)531-9060

Status:	**New** (Active)
Documents:	15 (55 total pages)
Signers:	3
Expires:	N/A (Requires: Primary)
Signatures:	Y

Details | Documents | Documents Received | EMails | Versions

Preview Mode - Off

Participants 👤+

#	Name/Email	Role	Created	Started	Consented	Viewed	Completed	Declined	Links
1	John Smith ron@docmagic.com	Borrower	10/3/22 1:54 PM						✉ Send Email 👁 Sign Documents
3	Andy Agent ron@docmagic.com	Settlement Agent	10/3/22 1:54 PM						✉ Send Email 👁 Agent Portal

Action Log

Date	User	IP Address	Description
10/3/22 1:54 PM	System User		eSign event created
10/3/22 1:54 PM	John Smith		Invitation sent to ron@docmagic.com
10/3/22 1:54 PM	Andy Agent		Invitation sent to ron@docmagic.com

Add Internal Note

Cancel Request   Delete Request

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DELL

eSign Console/Lender Portal

Adding Participants

Click here to add participants.

eSign Console - Steve Truitt

Scheduler Monitoring Accounts eSign Requests Create Request Search 👤 Account ▾

Return to Search

Loan #:	7710031350
Primary Name:	John Smith
Type:	Closing
Package Id:	04282
Worksheet #:	990 (Version
Closing Date:	30/22

Lender: **Ron Carrillo**
DSI TEST LENDER (SALES) (100SALES)

Status: **New** (Active)
Documents: **15** (55 total pages)
Signers: **3**
Expires: **N/A** (Requires: Primary)
Signatures: **Y**

Add Participant   ✕

Please provide the information for the new participant.

First Name:	Notary_name_placeholder
Last Name:	
Email:	
Access Code:	
Role:	Settlement Agent ⌄

Preview Mode - Off

Details | Docuvents | D

Participants 👤+

#	Name/Email		Completed	Declined	Links
1	John Smith ron@docmagic.com				✉ Send Email 🖊 Sign Documents
3	Andy Agent ron@docmagic.com				✉ Send Email 🖊 Agent Portal

Add   Cancel

Action Log

Date		
10/3/22 1:54 PM	System User	eSign event created
10/3/22 1:54 PM	John Smith	Invitation sent to ron@docmagic.com
10/3/22 1:54 PM	Andy Agent	Invitation sent to ron@docmagic.com

Add Internal Note

Cancel Request   Delete Request

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D∉LL

Populate the fields in the window that appears. Make sure to give them an Access Code and choose the correct role from the dropdown. Select Add when done.

Adding Participants

If there are signatures that are designated for the new participant, you would be able to go in and sign.

eSign Console/Lender Portal

Documents Tab

The Documents Tab displays a breakdown of the individual documents that are to be signed as part of the document package.

eSign Console - Steve Truitt				Scheduler	Monitoring	Accounts	eSign Requests	Create Request	Search	Account ▾

Loan #:	77710031350		Lender:	**Steve Truitt**				Status:	**New** (Active)	
Primary Name:	**John Smith**			DSI TEST LENDER (SALES) (100SALES)				Documents:	**15** (55 total pages)	
Type:	**EClosing**			struitt@docmagic.com				Signers:	**2**	
Package Id:	**604824**			(800)649-1362				Expires:	**N/A** (Requires: Primary)	
Worksheet #:	**2990** (Version : 2)							Signatures:	**Y (Ink Sign)**	
Closing Date:	**9/30/22**									

Details	Documents	Documents Received	EMails	Versions

Documents ➕ 🔧

	Document Name	**ClickSign**	**Page(s)**	**Mark(s)**	**Signer(s)**	**Completed**	**Sigreq Document Id	Document Id**	**Filename**	**Delete**	**Operation**
1	Borrower's Certification, Authorization and Consent	✔	2	1	1		5175538	5187039	bcac.msc.xml		
2	Multistate Fixed Rate Note		0/4	1	1		5175539	5187040	us3200.not.xml		Mark as Complete
3	New Jersey Mortgage (MERS)		0/19	1	1		5175540	5187041	nj3031.mzm.xml		Mark as Complete
4	Uniform Residential Loan Application	✔	7	1	1		5175541	5187042	urla.msc.xml		
5	Uniform Residential Loan Application - Lender Loan Information	✔	2	0	0	✔	5175542	5187043	urlalli.msc.xml		
6	Addendum to Closing Instructions	✔	1	1	1		5175543	5187044	atci3.msc.xml		
7	Specific Closing Instructions	✔	3	4	2		5175544	5187045	sci.msc.xml		
8	Hazard Insurance Authorization and Requirements	✔	2	1	1		5175545	5187046	hazard8.lsr.xml		
9	IVES Request for Transcript of Tax Return	✔	2	2	1		5175546	5187047	4506c.msc.xml		
10	Closing Disclosure	✔	5	1	1		5175547	5187048	cd.dsc.xml		
11	Customer Identification Verification	✔	2	0	0	✔	5175548	5187049	civ.msc.xml		
12	Initial Escrow Account Disclosure Statement	✔	2	1	1		5175549	5187050	ieads.msc.xml		
13	New Jersey Initial Tax Authorization Notice	✔	1	0	0	✔	5175550	5187051	njitan.msc.xml		
14	New Jersey Private Well Testing Act Certification	✔	1	1	1		5175551	5187052	njpwt.msc.xml		
15	Signature Affidavit and AKA Statement		0/2	1	1		5175552	5187053	saakas.msc.xml		Mark as Complete

Add Internal Note

DELL

Click on a Document Name to download a PDF copy of the document.

Add a Document

The plus icon allows you to add documents to the package.

---

eSign Console - Steve Truitt

Scheduler Monitoring Accounts eSign Requests Create Request Search 👤 Account ▾

Loan #:	77710031350	Lender:	**Steve Truitt**
Primary Name:	**John Smith**		DSI TEST LENDER (SALES) (100SALES)
Type:	**EClosing**		struitt@docmagic.com
Package Id:	**604824**		(800)649-1362
Worksheet #:	**2990** (Version :		
Closing Date:	**9/30/22**		

Status: **New** (Active)
Documents: **15** (55 total pages)
Signers: **2**
Expires: **N/A** (Requires: Primary)

Upload a new document

Document [   ] **Browse**

Submit **Cancel**

Details Documents

Documents ⊕ ✎

	Document Name							ame	Delete	Operation
1	Borrower's Certification, A							sc.xml		
2	Multistate Fixed Rate Note							not.xml		Mark as Complete
3	New Jersey Mortgage (MERS							zm.xml		Mark as Complete
4	Uniform Residential Loan Appli							c.xml		
5	Uniform Residential Loan Application - Lender Loan Information	✓	2	0	0	✓	5175542 | 5187043	urlalli.msc.xml		
6	Addendum to Closing Instructions	✓	1	1	1		5175543 | 5187044	atci3.msc.xml		
7	Specific Closing Instructions	✓	3	4	2		5175544 | 5187045	sci.msc.xml		
8	Hazard Insurance Authorization and Requirements	✓	2	1	1		5175545 | 5187046	hazard8.isr.xml		
9	IVES Request for Transcript of Tax Return	✓	2	2	1		5175546 | 5187047	4506c.msc.xml		
10	Closing Disclosure	✓	5	1	1		5175547 | 5187048	cd.dsc.xml		
11	Customer Identification Verification	✓	2	0	0	✓	5175548 | 5187049	civ.msc.xml		
12	Initial Escrow Account Disclosure Statement	✓	2	1	1		5175549 | 5187050	ieads.msc.xml		
13	New Jersey Initial Tax Authorization Notice	✓	1	0	0	✓	5175550 | 5187051	njitan.msc.xml		
14	New Jersey Private Well Testing AKA Certification	✓	1	1	1		5175551 | 5187052	njpwt.msc.xml		
15	Signature Affidavit and AKA Statement		0/2	1	1		5175552 | 5187053	saakas.msc.xml		Mark as Complete

Add Internal Note

DELL

Click Browse. Select a document from your computer and then click the blue Submit button.

AutoPrep

After you Submit, AutoPrep will trigger automatically and start tagging the document. It will detect signature lines and other items that need to be filled out.

AutoPrep

AutoPrep complete!
Ready for your review.

appraisal.pdf
552 KB · 8 pages

✓ Assigned signatures

🖐 Notary Fields   0

⚠️ Requires Validation   0

Next

DELL
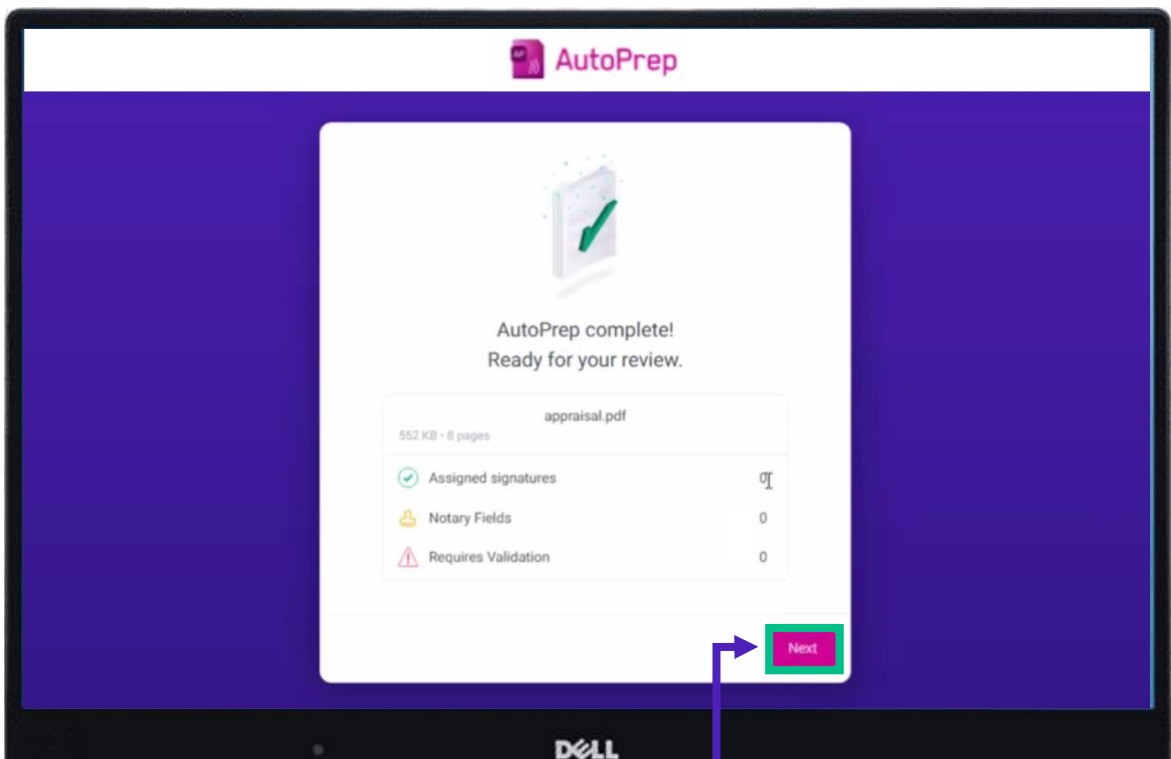
AutoPrep is our proprietary software that utilizes optical character recognition and artificial intelligence. For additional information, please visit our Product Training Page. Click Next to continue.

AutoPrep

Add any additional fields that AutoPrep may have missed by dragging them in from the right. Click Done.

Be sure to click the button down here to open the menu on the right.

Refresh

Clicking Done will take you back to the Loan. Click on the Documents tab and refresh the page.

eSign Console - Steve Truitt

Scheduler | Monitoring | Accounts

Loan #:	777090720220001	Lender:	Steve Truitt	Status:	In Pr
Primary Name:	John Smith		DSI TEST LENDER (SALES) (100SALES)	Documents:	16 (7
Type:	InitialDisclosure		struitt@docmagic.com	Signers:	3
Package Id:	590176		(800)649-1362	Expires:	N/A
Worksheet #:	2906 (Version : 1)			Signatures:	Y (In
Closing Date:	9/7/22				

Details | Documents | Documents Received | EMails | Versions

Documents ➕ 🔍

	Document Name	ClickSign	Page(s)	Mark(s)	Signer(s)	Completed	Sigreq Document Id | Document
1	Borrower's Certification, Authorization and Consent	✔	2	1	1		5092137 | 5103638
2	Uniform Residential Loan Application	✔	7	1	1		5092138 | 5103639
3	Uniform Residential Loan Application - Lender Loan Information	✔	2	0	0	✔	5092139 | 5103640
4	Virginia Disclosure of Terms of Mortgage Application	✔	1	1	1		5092140 | 5103641
5	IVES Request for Transcript of Tax Return	✔	2	2	1		5092141 | 5103642
6	Authorization for the Social Security Administration to Release SSN Verification		0/1	1	1		5092142 | 5103643
7	Housing Counselors Near You	✔	6	0	0	✔	5092143 | 5103644
8	Important Information About Procedures For Opening A New Account	✔	1	1	1		5092144 | 5103645
9	Iowa Subordination Agreement	✔	4	0	0	✔	5092145 | 5103646
10	Lender Record Change	✔	2	0	0	✔	5092146 | 5103647
11	Loan Estimate	✔	3	3	1		5092147 | 5103648
12	Settlement Services Provider List	✔	2	1	1		5092148 | 5103649
13	Virginia Hazard Insurance Disclosure	✔	1	1	1		5092149 | 5103650
14	Virginia Lock in Agreement	✔	2	1	1		5092150 | 5103651
15	Your Home Loan Toolkit	✔	28	0	0	✔	5092151 | 5103652
16	appraisal	✔	8	2	1		5092266 | 5103767

Add Internal Note

DELL

The document that you added will appear at the bottom.

eSign Console/Lender Portal

Edit Document

The pencil icon here allows you to edit a document.

A window will appear where you can go through every document and edit. Click Done at the top right when finished.

Documents Received

Documents Received is only for closing packages. If there are any notarized documents that the notary has uploaded back into the portal, they show up here.

Emails

Emails contain the invitations that you've sent out already.

eSign Console - Steve Truitt

Loan #: 777090720220001
Primary Name: John Smith
Type: InitialDisclosure
Package Id: 590176
Worksheet #: 2906 (Version : 1)
Closing Date: 9/7/22

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

Details   Documents   Documents Received   EMails   Versions

Emails

Created	Event	To:
9/7/22, 11:04 AM	SendInvitation	struitt@docmagic.com
9/7/22, 11:04 AM	SendInvitation	struitt@docmagic.com
9/7/22, 11:04 AM	SendInvitation	struitt@docmagic.com
9/7/22, 11:04 AM	SendInvitation	struitt@docmagic.com
9/7/22, 11:17 AM	SendInvitation	struitt@docmagic.com
9/7/22, 11:19 AM	ConsentEsign	struitt@docmagic.com
9/7/22, 11:19 AM	ConsentEsign	struitt@docmagic.com
9/7/22, 11:19 AM	RESPASatisfied	struitt@docmagic.com

DELL

Versions

If you have different versions of the loan package, they'll be here.

eSign Console - Steve Truitt

Loan #:	777090720220001
Primary Name:	John Smith
Type:	InitialDisclosure
Package Id:	590176
Worksheet #:	2906 (Version : 1)
Closing Date:	9/7/22

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

Details   Documents   Documents Received   EMails   **Versions**

Versions

#	Package Type	Version	Package ID
1	Closing Documents	1	590174
2	Initial Disclosure	1	590176

D∅LL

This middle area shows the date and time that each milestone was completed for the participants. In the example below, the eSign event has been created but none of our participants have started the process.

eSign Console - Steve Truitt

Scheduler   Monitorin   Accounts   eSign Requests   Create Request   Search   Account ▾

Return to Search

Loan #:	77710031350
Primary Name:	John Smith
Type:	EClosing
Package Id:	604282
Worksheet #:	2990 (Version : 1)
Closing Date:	9/30/22

Lender:	Ron Carrillo
	DSI TEST LENDER (SALES) (100SAL S)
	ron@docmagic.com
	(708)531-9060

Status:	New (Active)
Documents:	15 (55 total pages)
Signers:	3
Expires:	N/A (Requires: Primary)
Signatures:	Y

Details | Documents | Documents Received | EMails | Versions

Participants 👤+

Preview Mode - Off

#	Name/Email	Role	Created	Started	Consented	Viewed	Completed	Declined	Links
1	John Smith ron@docmagic.com	Borrower	10/3/22 1:54 PM						✉ Send Email 👓 Sign Documents
3	Andy Agent ron@docmagic.com	Settlement Agent	10/3/22 1:54 PM						✉ Send Email 👓 Agent Portal
4	Notary_name_placeholder -1 NOTARY_EMAIL_PLACEHOLDER-1	Notary	10/3/22 1:54 PM						✉ Send Email

Action Log

Date	User	IP Address	Description
10/3/22 1:54 PM	System User		eSign event created
10/3/22 1:54 PM	John Smith		Invitation sent to ron@docmagic.com
10/3/22 1:54 PM	Andy Agent		Invitation sent to ron@docmagic.com

Add Internal Note

Cancel Request   Delete Request

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DELL

The timestamps will populate as the participants start the process, give their consent, view the documents, and then either complete their signing or decline to sign.

When the borrower clicks on the link in the invitation email, they will be taken to DocMagic's signing experience displayed below.
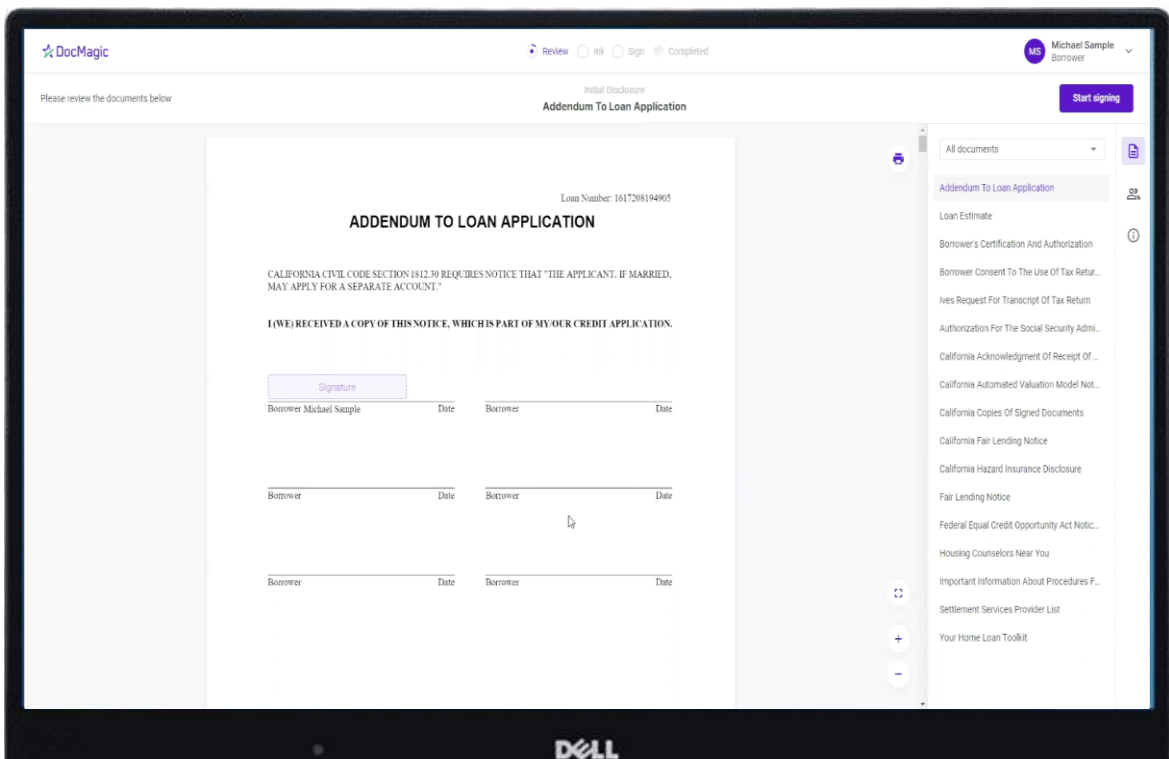
Here, the borrower will be able to sign the necessary documents. For more information on the borrower's signing experience, please visit our Product Training Page.

eSign Console/Lender Portal

Post Borrower Signing

After the borrower completes their signing experience, you'll be able to see the row of date and time stamps here. Refresh the web page if you don't see the changes at first.

The Action Log documents all the changes that occur.

eSign Console/Lender Portal

Icons

There are some useful icons towards the top right of the page. The lock allows you to archive the package.

You can reset the PDF by clicking here – this makes all the fields blank again.

Icons

The printer opens your printing options.

You can view the DocMagic eSign certificate by clicking here.

The certificate mentioned previously downloads or opens as a PDF.

The PDF icon downloads the entire list of signed documents (including the certificate).

We recommend that you save the document sets after all signatures are collected, as you will only have a loan document set in the portal for 90 days.

Create Request

> If there are document(s) that you want to send separate, click "Create Request" in the top right corner.

Create Request

Fill out the necessary information and attach your document(s). Clicking Prepare your document sends it through the AutoPrep.

eSign Console - Steve Truitt   Create Request   Search   👤 Account ▾

*From:
(You)   Email Address

                First   Middle   Last   Suffix

                                                                        I am the signer ☐

To:
(Signers)   Email Address

                First   Middle   Last   Suffix   Code

                                                        Add/Remove Signers

*Documents: 🖉 Attach   Prepare your document

Subject: Optional
optional

Message: Optional
optional

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

                            Clear   Submit

                            DELL

Hit the Submit button at the bottom when you're done.