

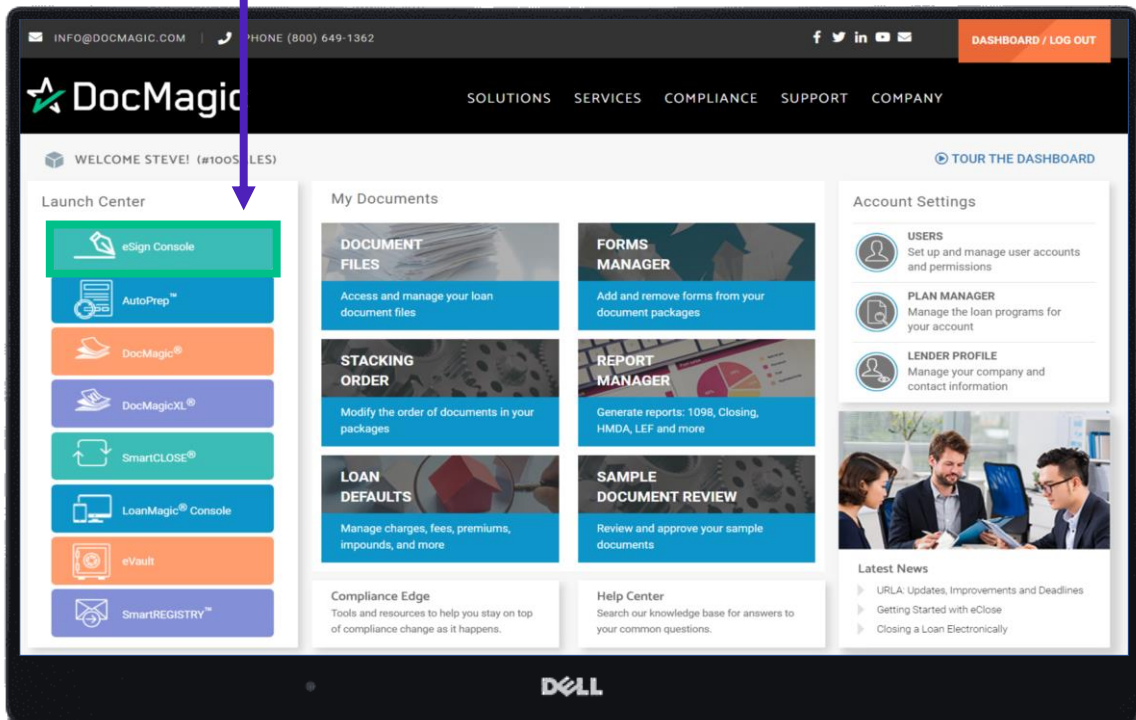


eSign Console  
Lender Portal

# eSign Console/Lender Portal

## Getting Started

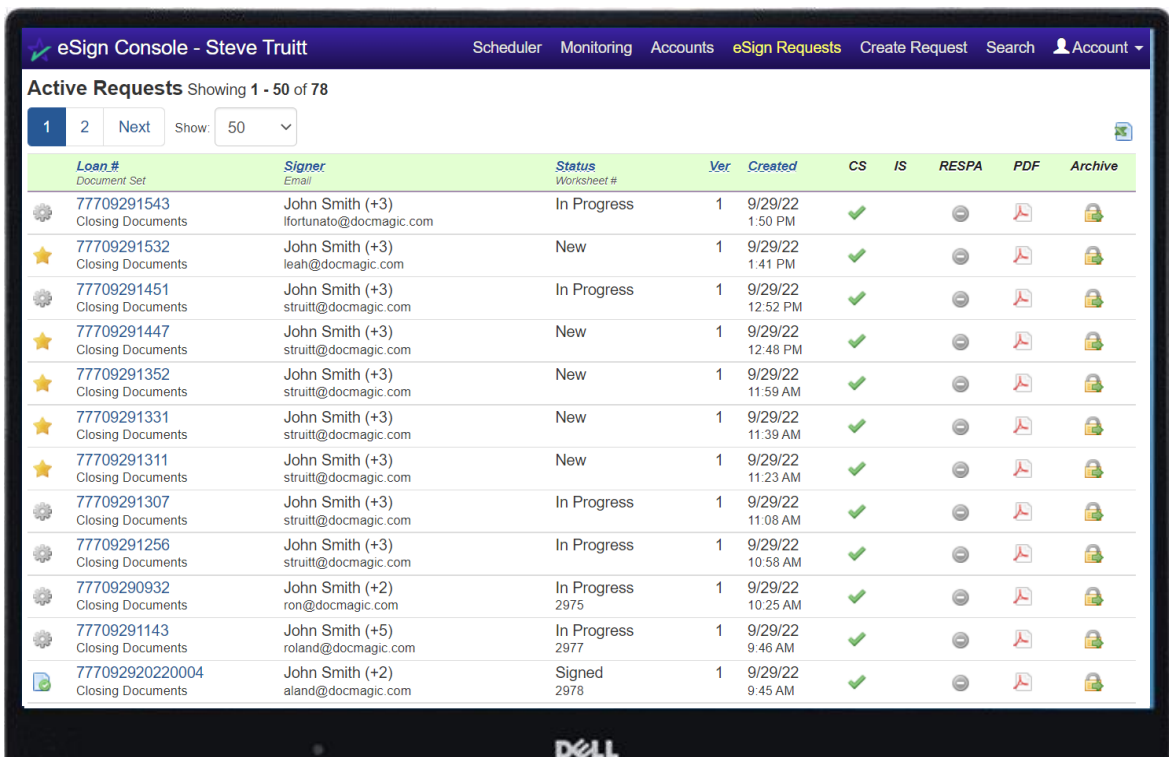
Login to DocMagic and open the eSign Console from the Launch Center.



# eSign Console/Lender Portal

## eSign Console

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



The screenshot displays the 'eSign Console - Steve Truitt' interface. The top navigation bar includes 'Scheduler', 'Monitoring', 'Accounts', 'eSign Requests', 'Create Request', 'Search', and 'Account'. The main content area is titled 'Active Requests Showing 1 - 50 of 78'. Below this, there is a pagination control with '1', '2', 'Next', and 'Show: 50'. The table below lists various loan document sets with columns for Loan #, Signer, Status, Ver, Created, CS, IS, RESPA, PDF, and Archive.

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	✓	⊖	⊖	📄	🔒

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.

The screenshot displays the eSign Console interface for Steve Truitt. The top navigation bar includes 'Scheduler', 'Monitoring', 'Accounts', 'eSign Requests', 'Create Request', 'Search', and 'Account'. The 'Account' dropdown menu is open, showing options: 'Dashboard', 'My Account', 'Preferences', 'Contact Us', 'Help', and 'Sign Out'. The 'Help' option is highlighted with a green box. Below the navigation bar, the 'Active Requests' section shows a table of 15 requests. The table columns are: Loan # (Document Set), Signer (Email), Status (Worksheet #), Ver., Created, CS, IS, and RES. The requests are listed with their respective details, including loan numbers, signer names, statuses, and creation times.

Loan # Document Set	Signer Email	Status Worksheet #	Ver.	Created	CS	IS	RES
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	✓		



# 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).

Active Requests Showing 1 - 50 of 78

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	✓	⊖	📄	🔒	

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.

Loan # Document Set	Signer Email	Status Worksheet #	Ver	Created	CS	IS	RESPA	PDF	Archive
77709291543	John Smith (+3) lfortunato@docmagic.com	In Progress	1	9/29/22 1:50 PM	✓	⊖	📄	🔒	
77709291532	John Smith (+3) leah@docmagic.com	New	1	9/29/22 1:41 PM	✓	⊖	📄	🔒	
77709291451	John Smith (+3) struitt@docmagic.com	In Progress	1	9/29/22 12:52 PM	✓	⊖	📄	🔒	
77709291447	John Smith (+3) struitt@docmagic.com	New	1	9/29/22 12:48 PM	✓	⊖	📄	🔒	
77709291352	John Smith (+3) struitt@docmagic.com	New	1	9/29/22 11:59 AM	✓	⊖	📄	🔒	
77709291331	John Smith (+3) struitt@docmagic.com	New	1	9/29/22 11:39 AM	✓	⊖	📄	🔒	
77709291311	John Smith (+3) struitt@docmagic.com	New	1	9/29/22 11:23 AM	✓	⊖	📄	🔒	
77709291307	John Smith (+3) struitt@docmagic.com	In Progress	1	9/29/22 11:08 AM	✓	⊖	📄	🔒	
77709291256	John Smith (+3) struitt@docmagic.com	In Progress	1	9/29/22 10:58 AM	✓	⊖	📄	🔒	
77709290932	John Smith (+2) ron@docmagic.com	In Progress 2975	1	9/29/22 10:25 AM	✓	⊖	📄	🔒	
77709291143	John Smith (+5) roland@docmagic.com	In Progress 2977	1	9/29/22 9:46 AM	✓	⊖	📄	🔒	
77709292020004	John Smith (+2) aland@docmagic.com	Signed 2978	1	9/29/22 9:45 AM	✓	⊖	📄	🔒	

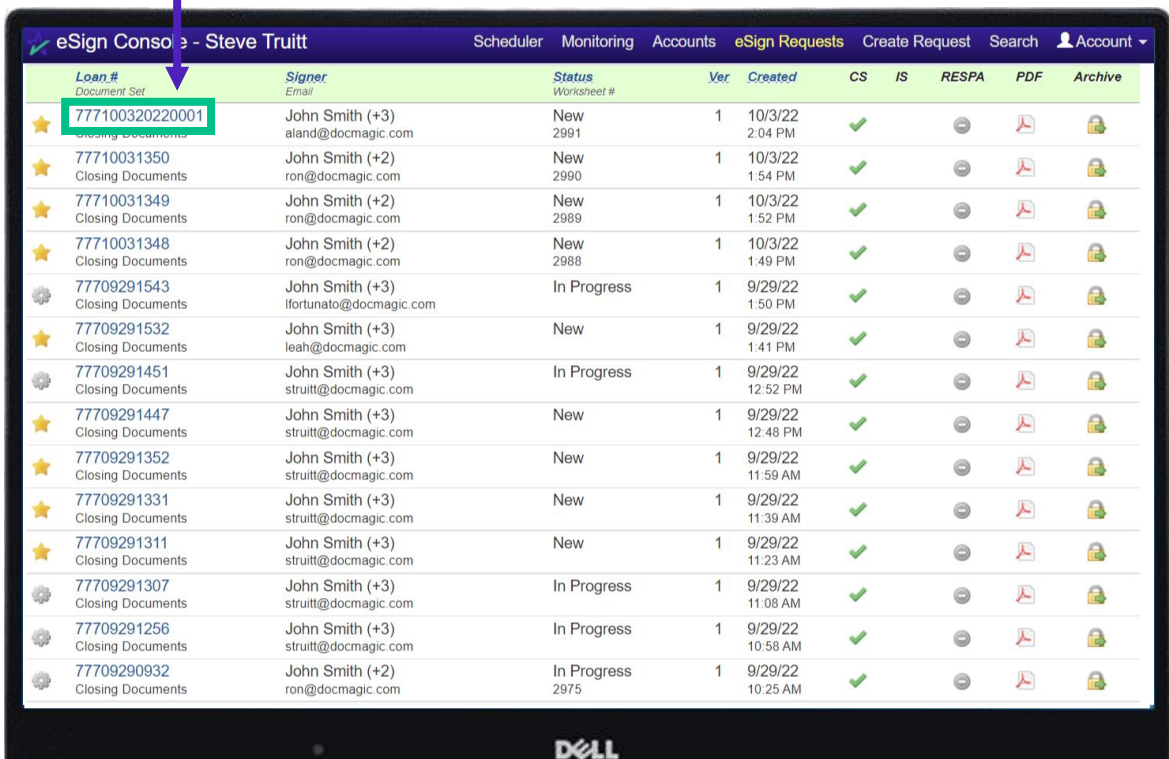
The full checkmark indicates that the document set has been signed and printed.



# eSign Console/Lender Portal

## Opening a Document Set

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



The screenshot shows the eSign Console interface for Steve Truitt. The top navigation bar includes Scheduler, Monitoring, Accounts, eSign Requests, Create Request, Search, and Account. The main content area displays a table of document sets with columns for Loan.#, Signer, Status, Ver, Created, CS, IS, RESPA, PDF, and Archive. The first row, with loan number 777100320220001, is highlighted with a green box and a callout arrow pointing to it from the text above.

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/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.

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

- Loan Details:** Loan #: 77710031350, Lender: Ron Carrillo, Status: New (Active). Primary Name: John Smith, Type: EClosing, Package Id: 604282, Worksheet #: 2990 (Version: 1), Closing Date: 9/30/22. Lender information: DSI TEST LENDER (SALES) (100SALES), ron@docmagic.com, (708)531-9060. Documents: 15 (55 total pages), Signers: 3, Expires: N/A (Requires: Primary), Signatures: Y.
- Navigation:** Details, Documents, Documents Received, EMail, Versions.
- Participants:** A table listing participants with columns for #, Name/Email, Role, Created, Started, Consented, Viewed, Completed, Declined, and Links. Two participants are listed: John Smith (Borrower) and Andy Agent (Settlement Agent).
- Action Log:** A table with columns for Date, User, IP Address, and Description. It shows three entries: eSign event created, Invitation sent to ron@docmagic.com, and Invitation sent to ron@docmagic.com.

At the bottom of the interface, there are buttons for Add Internal Note, Cancel Request, and Delete Request. The footer includes copyright information for DocMagic, Inc. and links for Home, Contact, Privacy Policy, and Terms of Use.





# eSign Console/Lender Portal

## 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.

The screenshot displays the eSign Console interface for a user named Steve Truitt. The top navigation bar includes links for Scheduler, Monitoring, Accounts, eSign Requests, Create Request, Search, and Account. The main content area shows loan details for Loan # 77710031350, Primary Name John Smith, Type EClosing, and Package Id 604282. The Worksheet # 2990 (Version: 1) is highlighted with a green box and a blue arrow pointing to it from the text box above. Other details include Lender: Ron Carrillo (DSI TEST LENDER (SALES) (100SALES)), Status: New (Active), Documents: 15 (55 total pages), Signers: 3, Expires: N/A (Requires: Primary), and Signatures: Y. Below the details are tabs for Details, Documents, Documents Received, EMail, and Versions. The Participants section shows a table with columns for #, Name/Email, Role, Created, Started, Consented, Viewed, Completed, Declined, and Links. The Action Log section shows a table with columns for Date, User, IP Address, and Description. At the bottom, there are buttons for Add Internal Note, Cancel Request, and Delete Request, along with copyright information and a footer with Home, Contact, Privacy Policy, and Terms of Use links.

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

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



# 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.

The screenshot displays the eSign Console interface for a document set. The top navigation bar includes 'Scheduler', 'Monitoring', 'Accounts', 'eSign Requests', 'Create Request', 'Search', and 'Account'. The main content area is divided into two sections: 'Participants' and 'Action Log'. The 'Participants' section is highlighted with a green box and contains a table with columns for '#', 'Name/Email', 'Role', 'Created', 'Started', 'Consented', 'Viewed', 'Completed', 'Declined', and 'Links'. The 'Action Log' section is also highlighted with a green box and contains a table with columns for 'Date', 'User', 'IP Address', and 'Description'. Both sections are linked to the 'Details' tab in the top navigation bar.

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

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

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.

The screenshot displays the eSign Console interface for a loan. The top navigation bar includes 'Scheduler', 'Monitoring', 'Accounts', 'eSign Requests', 'Create Request', 'Search', and 'Account'. The main content area shows loan details for Loan # 77710031350, Lender: Ron Carrillo, and Status: New (Active). Below this, there are tabs for 'Details', 'Documents', 'Documents Received', 'EMails', and 'Versions'. The 'Participants' section contains a table with columns for #, Name/Email, Role, Created, Started, Consented, Viewed, Completed, Declined, and Links. The first participant is John Smith, a Borrower, with a 'Send Email' link in the 'Links' column. The 'Action Log' section below shows a list of events, including 'eSign event created' and 'Invitation sent to ron@docmagic.com'. At the bottom, there are buttons for 'Cancel Request' and 'Delete Request', and a footer with copyright information and a 'DELL' logo.

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

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.



# eSign Console/Lender Portal

## Links

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

The screenshot shows the eSign Console interface for a loan. At the top, there is a navigation bar with options like Scheduler, Monitoring, Accounts, eSign Requests, Create Request, Search, and Account. Below this is a summary section for Loan # 77710031350, Lender: Ron Carrillo, and Status: New (Active). The Participants table lists John Smith as the Borrower and Andy Agent as the Settlement Agent. The Andy Agent row has a link for 'Agent Portal' highlighted with a green box. Below the table is an Action Log section.

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



# eSign Console/Lender Portal

## Adding Participants

Click here to add participants.

The screenshot displays the eSign Console interface for user Steve Truitt. A modal window titled "Add Participant" is open, prompting for information for a new participant. The fields are: First Name (Notary\_name\_placeholder), Last Name, Email, Access Code, and Role (Settlement Agent). The "Add" button is highlighted with a green box. In the background, the "Participants" table shows two existing participants: John Smith and Andy Agent. The "Action Log" table shows recent events: "eSign event created", "Invitation sent to ron@docmagic.com", and "Invitation sent to ron@docmagic.com".

#	Name/Email
1	John Smith ron@docmagic.com
3	Andy Agent ron@docmagic.com

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

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.



# eSign Console/Lender Portal

## Adding Participants

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

The screenshot displays the eSign Console interface for a user named Steve Truitt. The top navigation bar includes links for Scheduler, Monitoring, Accounts, eSign Requests, Create Request, Search, and Account. The main content area shows loan details for Loan # 77710031350, Lender Ron Carrillo, and Status New (Active). Below this, there are tabs for Details, Documents, Documents Received, EMail, and Versions. The 'Participants' section lists three participants: John Smith (Borrower), Andy Agent (Settlement Agent), and a Notary placeholder. The 'Action Log' section shows a history of events, including the creation of the eSign event and the sending of invitations. A red box highlights the 'Sign Documents' link in the 'Links' column for the Notary participant.

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

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

© Copyright 2022 DocMagic, Inc. - ALL RIGHTS RESERVED

Home Contact Privacy Policy Terms of Use



# 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	n3031.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	urlali.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	leads.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	njpwat.msc.xml		
15 Signature Affidavit and AKA Statement		0/2	1	1			5175552   5187053	saakas.msc.xml		Mark as Complete

Add Internal Note

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



# eSign Console/Lender Portal

## Add a Document

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

The screenshot displays the eSign Console interface for a loan package. At the top, there are navigation tabs: Scheduler, Monitoring, Accounts, eSign Requests, Create Request, Search, and Account. The main header shows the loan details: Loan #: 77710031350, Lender: Steve Truitt, Status: New (Active), Primary Name: John Smith, Type: EClosing, Package Id: 604824, Worksheet #: 2990 (Version: 1), Closing Date: 9/30/22, and Documents: 15 (55 total pages). A modal window titled "Upload a new document" is open, featuring a "Document" input field, a "Browse" button, and "Submit" and "Cancel" buttons. A table below the modal lists 15 documents with columns for Document Name, status, and operations. A green box highlights the plus icon in the Documents tab, and another green box highlights the "Browse" button. A blue arrow points from the "Browse" button to the "Submit" button.

Document Name																			
1	Borrower's Certification, A																		
2	Multistate Fixed Rate Note																		
3	New Jersey Mortgage (MER)																		
4	Uniform Residential Loan Appl																		
5	Uniform Residential Loan Application - Lender Loan Information	✓	2	0	0	✓	5175542		5187043										
6	Addendum to Closing Instructions	✓	1	1	1		5175543		5187044										
7	Specific Closing Instructions	✓	3	4	2		5175544		5187045										
8	Hazard Insurance Authorization and Requirements	✓	2	1	1		5175545		5187046										
9	IVES Request for Transcript of Tax Return	✓	2	2	1		5175546		5187047										
10	Closing Disclosure	✓	5	1	1		5175547		5187048										
11	Customer Identification Verification	✓	2	0	0	✓	5175548		5187049										
12	Initial Escrow Account Disclosure Statement	✓	2	1	1		5175549		5187050										
13	New Jersey Initial Tax Authorization Notice	✓	1	0	0	✓	5175550		5187051										
14	New Jersey Private Well Testing Act Certification	✓	1	1	1		5175551		5187052										
15	Signature Affidavit and AKA Statement		0/2	1	1		5175552		5187053										

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

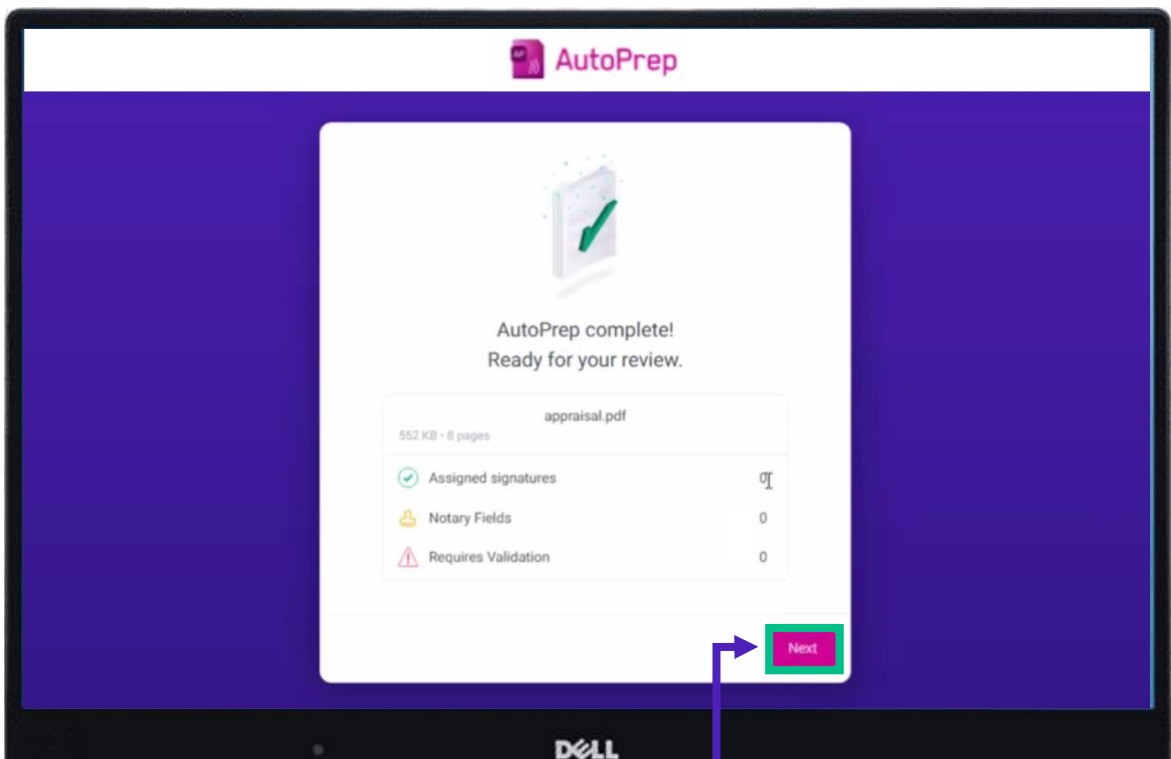




# eSign Console/Lender Portal

## 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 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.



# eSign Console/Lender Portal

AutoPrep

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

The screenshot displays a web application interface for document preparation. It features a main content area with several sections: a text input field for external factors, a 'GENERAL COMMENTS' section, 'SUBJECT PROPERTY DETAIL' (including County, Lot Size, Year Built, etc.), and 'LOCAL MARKET CONDITIONS' (including Listing Analysis and Market Trends tables). On the right side, there is a vertical menu with options: 'Done' (highlighted in a pink box), 'Signature Fields' (with sub-options for Signature and Initial), 'Notary Fields', 'PostFill' (with sub-options for Textbox, Checkbox, and Date), and a close button (X in a circle, highlighted in a green box). A blue arrow points from the 'Done' button to the text box above, and another blue arrow points from the close button to the text box below.

Listing Analysis	Market Trends																																																
<table border="1"><thead><tr><th>List Price Range</th><th>Beds/Baths</th><th>SqFt</th><th># Homes for Sale</th></tr></thead><tbody><tr><td>\$953,000 - \$2,500,000</td><td>5 / 3.8</td><td>5,000</td><td>47</td></tr><tr><td>\$761,000 - \$951,000</td><td>5 / 3</td><td>3,578</td><td>48</td></tr><tr><td>\$545,000 - \$759,000</td><td>4 / 2.6</td><td>3,254</td><td>48</td></tr><tr><td>\$191,000 - \$542,000</td><td>4 / 2.1</td><td>1,508</td><td>48</td></tr></tbody></table>	List Price Range	Beds/Baths	SqFt	# Homes for Sale	\$953,000 - \$2,500,000	5 / 3.8	5,000	47	\$761,000 - \$951,000	5 / 3	3,578	48	\$545,000 - \$759,000	4 / 2.6	3,254	48	\$191,000 - \$542,000	4 / 2.1	1,508	48	<table border="1"><thead><tr><th>Component</th><th>Value</th><th>Change</th><th>Trend</th></tr></thead><tbody><tr><td># Homes for Sale</td><td>190.7</td><td>-27.4</td><td>-12.6%</td></tr><tr><td>Price</td><td>\$758,315</td><td>\$31,135</td><td>4.3%</td></tr><tr><td>Days on Market</td><td>95</td><td>5.5</td><td>6.2%</td></tr><tr><td>New Listings</td><td>7.8</td><td>-2.9</td><td>-27.1%</td></tr><tr><td>Sales</td><td>11.1</td><td>-3.8</td><td>-25.8%</td></tr><tr><td>Price Per Square Ft</td><td>\$277</td><td>\$19</td><td>6.9%</td></tr></tbody></table>	Component	Value	Change	Trend	# Homes for Sale	190.7	-27.4	-12.6%	Price	\$758,315	\$31,135	4.3%	Days on Market	95	5.5	6.2%	New Listings	7.8	-2.9	-27.1%	Sales	11.1	-3.8	-25.8%	Price Per Square Ft	\$277	\$19	6.9%
List Price Range	Beds/Baths	SqFt	# Homes for Sale																																														
\$953,000 - \$2,500,000	5 / 3.8	5,000	47																																														
\$761,000 - \$951,000	5 / 3	3,578	48																																														
\$545,000 - \$759,000	4 / 2.6	3,254	48																																														
\$191,000 - \$542,000	4 / 2.1	1,508	48																																														
Component	Value	Change	Trend																																														
# Homes for Sale	190.7	-27.4	-12.6%																																														
Price	\$758,315	\$31,135	4.3%																																														
Days on Market	95	5.5	6.2%																																														
New Listings	7.8	-2.9	-27.1%																																														
Sales	11.1	-3.8	-25.8%																																														
Price Per Square Ft	\$277	\$19	6.9%																																														

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



# eSign Console/Lender Portal

Refresh

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

The screenshot shows the eSign Console interface for a loan. The top navigation bar includes 'eSign Console - Steve Truitt', 'Scheduler', 'Monitoring', and 'Accounts'. The main header displays loan details: Loan # 777090720220001, Primary Name John Smith, Lender Steve Truitt, and Status In Progress. Below this is a 'Documents' tab, which is highlighted in green. The 'Documents' table lists 16 documents, with the 16th document, 'appraisal', highlighted in green. The table columns are Document Name, ClickSigns, Page(s), Mark(s), Signer(s), Completed, and Sigreq Document Id | Document.

Document Name	ClickSigns	Page(s)	Mark(s)	Signer(s)	Completed	Sigreq Document Id   Document
1 Borrower's Certification, Authorization and Consent	✓	2	1	1		5092137   5103630
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

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.

The screenshot displays the eSign Console interface. On the left, a sidebar shows a list of documents under the heading "Documents". A pencil icon is highlighted in a green box next to the "Documents" header. A purple arrow points from this icon to a text box above. The main content area shows a document titled "Initial Disclosure" with a "Done" button in the top right corner. The document content includes sections for "EXTERNAL FACTORS" and "EXTERNAL FACTOR COMMENTS". A signature of "Stephen Truitt" is visible in the comments section.

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



# eSign Console/Lender Portal

## 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.

The screenshot displays the eSign Console interface for a user named Steve Truitt. The top navigation bar includes 'eSign Console - Steve Truitt' and a 'Scheduler' link. The main content area is divided into two sections: a header with loan details and a tabbed interface below.

**Loan Details:**

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

**Lender Information:**

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

**Navigation Tabs:** Details, Documents, Documents Received (highlighted), EMail, Versions.

**Table Structure:**

#	Preview	PDF	Uploaded	Document	Operation
					Add Internal Note

© Copyright 2022 DocMagic, Inc. - ALL RIGHTS RESERVED

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



# eSign Console/Lender Portal

## 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



# eSign Console/Lender Portal

## Versions

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

The screenshot displays the 'eSign Console - Steve Truitt' interface. At the top, there are two columns of loan details. The left column includes: Loan # 777090720220001, Primary Name: John Smith, Type: InitialDisclosure, Package Id: 590176, Worksheet #: 2906 (Version : 1), and Closing Date: 9/7/22. The right column includes: Lender: Steve Truitt, DSI TEST LENDER (SALES) (100SALES), struitt@docmagic.com, and (800)649-1362. Below this is a navigation bar with tabs: Details, Documents, Documents Received, EMails, and Versions. The 'Versions' tab is selected and highlighted with a green box. A blue arrow points from the text box above to this tab. Under the 'Versions' tab, there is a table with the following data:

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

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



# eSign Console/Lender Portal

## Milestones

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.

The screenshot displays the eSign Console interface for a loan. The top navigation bar includes 'Scheduler', 'Monitoring', 'Accounts', 'eSign Requests', 'Create Request', 'Search', and 'Account'. The main content area is divided into several sections:

- Loan Details:** Loan #: 77710031350, Lender: Ron Carrillo (DSI TEST LENDER (SALES) (100SAL...)), Status: New (Active), Documents: 15 (55 total pages), Signers: 3, Expires: N/A (Requires: Primary), Signatures: Y.
- Participants Table:** A table with columns: #, Name/Email, Role, Created, Started, Consented, Viewed, Completed, Declined, and Links. All 'Created' and 'Started' timestamps are 10/3/22 1:54 PM.
- Action Log Table:** A table with columns: Date, User, IP Address, and Description. It shows three entries: 'eSign event created', 'Invitation sent to ron@docmagic.com', and 'Invitation sent to ron@docmagic.com', all dated 10/3/22 1:54 PM.

The 'Participants' table is highlighted with a green box, and a blue arrow points from the explanatory text above to this table.

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

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

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.

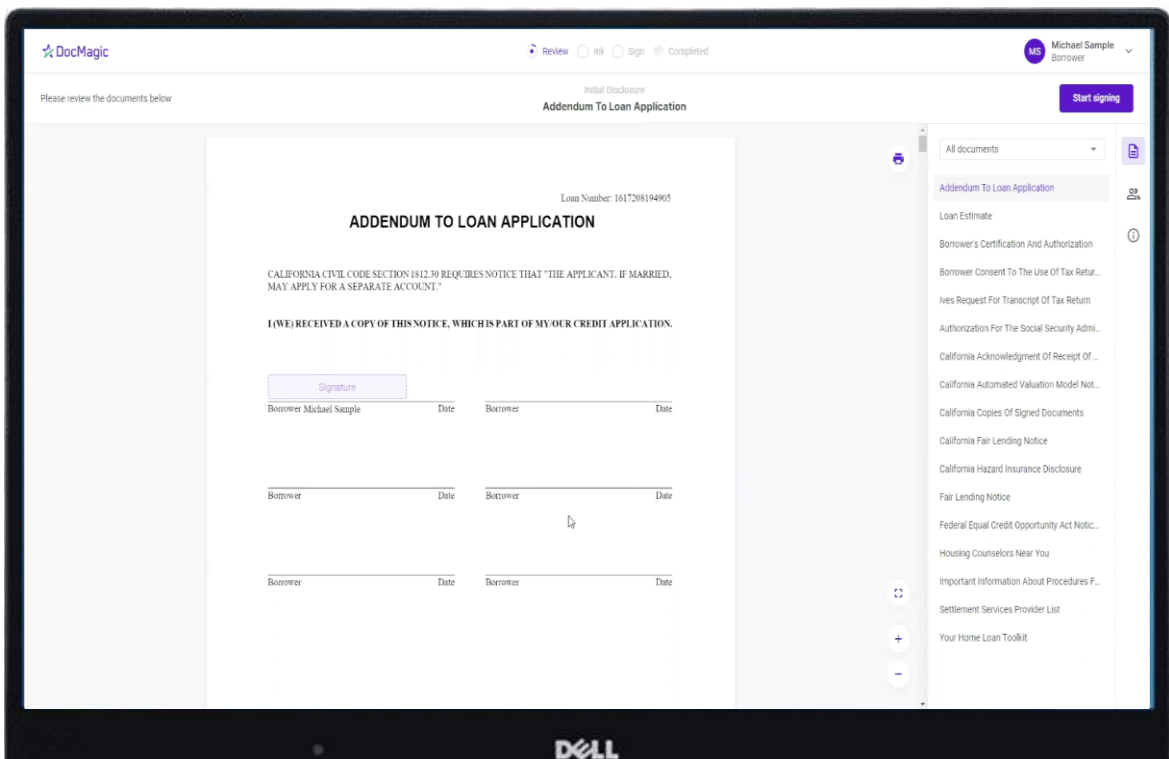




# eSign Console/Lender Portal

## Borrower's Signing Experience

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 screenshot displays the eSign Console interface for a loan. The top navigation bar includes 'Scheduler', 'Monitoring', 'Accounts', 'eSign Requests', 'Create Request', 'Search', and 'Account'. The main content area is divided into several sections:

- Loan Details:** Loan # 777090720220001, Lender: Steve Truitt (DSI TEST LENDER (SALES) (100SALES)), Status: In Progress (Active), Documents: 16 (72 total pages), Signers: 3, Expires: N/A (Requires: Primary), Signatures: Y (Ink Sign).
- Participants Table:** A table with columns for ID, Name/Email, Role, Created, Started, Consented, Viewed, Completed, Declined, and Links. The 'Created' column for the borrower (John Smith) is highlighted with a green box.
- Action Log Table:** A table with columns for Date, User, IP Address, and Description. The log entries are sorted chronologically, showing the sequence of events from loan creation to document signing.

ID	Name/Email	Role	Created	Started	Consented	Viewed	Completed	Declined	Links
1	John Smith struitt@docmagic.com	Borrower	9/7/22 11:04 AM	9/7/22 11:19 AM	9/7/22 11:19 AM	9/7/22 11:19 AM	9/7/22 11:31 AM		Send Email Sign Documents 4506-C
3	Andy Agent struitt@docmagic.com	Settlement Agent	9/7/22 11:04 AM						Send Email Agent Portal
4	Stephen Truitt struitt21@gmail.com	Other	9/7/22 11:17 AM						Send Email Sign Documents

Date	User	IP Address	Description
9/7/22 11:04 AM	System User		eSign event created
9/7/22 11:04 AM	John Smith		Invitation sent to struitt@docmagic.com
9/7/22 11:04 AM	Andy Agent		Invitation sent to struitt@docmagic.com
9/7/22 11:07 AM	Steve Truitt		Stephen Truitt (struitt21@gmail.com) added as Other
9/7/22 11:07 AM	Stephen Truitt		Invitation sent to struitt21@gmail.com
9/7/22 11:09 AM	John Smith		Consented to DocMagic eSign
9/7/22 11:09 AM	John Smith		Receipt of early disclosures within 3 business days met
9/7/22 11:09 AM	John Smith		eSign event started
9/7/22 11:09 AM	John Smith		Initial Disclosure version 1 prepared on September 07, 2022, 11:04 AM PDT displayed
9/7/22 11:12 AM	Steve Truitt		Document batch upload completed
9/7/22 11:10 AM	System User		Date: 2022-09-07 11:30:09 InkSign Fax received for document: 5103643 ()
9/7/22 11:10 AM	John Smith		Authorization for the Social Security Administration to Release SSN Verification signed by John Smith
9/7/22 11:01 AM	John Smith		Approved electronic representation of signature
9/7/22 11:01 AM	John Smith		Approved electronic representation of signature
9/7/22 11:01 AM	John Smith		Borrower's Certification, Authorization and Consent signed by JOHN SMITH
9/7/22 11:01 AM	John Smith		Uniform Residential Loan Application signed by JOHN SMITH
9/7/22 11:01 AM	John Smith		Virginia Disclosure of Terms of Mortgage Application signed by JOHN SMITH
9/7/22 11:01 AM	John Smith		IVES Request for Transcript of Tax Return signed by JOHN SMITH
9/7/22 11:01 AM	John Smith		Important Information About Procedures For Opening A New Account signed by JOHN SMITH

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.

The screenshot displays the eSign Console interface for a loan package. The top navigation bar includes links for Scheduler, Monitoring, Accounts, eSign Requests, Create Request, Search, and a user profile icon. The header section shows the following details:

- Loan #: 777090720220001
- Lender: Steve Truitt (DSI TEST LENDER (SALES) (100SALES))
- Status: In Progress (Active)
- Primary Name: John Smith
- Type: Initial Disclosure
- Documents: 16 (72 total pages)
- Package Id: 590176
- Signers: 3
- Worksheet #: 2906 (Version: 1)
- Expires: N/A (Requires: Primary)
- Closing Date: 9/7/22
- Signatures: Y (Ink Sign)

The 'Participants' table lists the following individuals:

#	Name/Email	Role	Created	Started	Consented	Viewed	Completed
1	John Smith struitt@docmagic.com	Borrower	9/7/22 11:04 AM	9/7/22 11:19 AM	9/7/22 11:19 AM	9/7/22 11:19 AM	9/7/22 11:19 AM
3	Andy Agent struitt@docmagic.com	Settlement Agent	9/7/22 11:04 AM				
4	Stephen Truitt struitt21@gmail.com	Other	9/7/22 11:17 AM				

The 'Action Log' table provides a detailed history of events:

Date	User	IP Address	Description
9/7/22 11:04 AM	System User		eSign event created
9/7/22 11:04 AM	John Smith		Invitation sent to struitt@docmagic.com
9/7/22 11:04 AM	Andy Agent		Invitation sent to struitt@docmagic.com
9/7/22 11:17 AM	Steve Truitt		Stephen Truitt (struitt21@gmail.com) added as Other
9/7/22 11:17 AM	Stephen Truitt		Invitation sent to struitt21@gmail.com
9/7/22 11:19 AM	John Smith		Consented to DocMagic eSign
9/7/22 11:19 AM	John Smith		Receipt of early disclosures within 3 business days met
9/7/22 11:19 AM	John Smith		eSign event started
9/7/22 11:19 AM	John Smith		Initial Disclosure version 1 prepared on September 07, 2022, 11:04 AM PDT displayed
9/7/22 11:22 AM	Steve Truitt		Document batch upload completed
9/7/22 11:30 AM	System User		Date: 2022-09-07 11:30:09 InkSign Fax received for document: 5103643 ()
9/7/22 11:30 AM	John Smith		Authorization for the Social Security Administration to Release SSN Verification signed by John Smith
9/7/22 11:31 AM	John Smith		Approved electronic representation of signature
9/7/22 11:31 AM	John Smith		Approved electronic representation of signature
9/7/22 11:31 AM	John Smith		Borrower's Certification, Authorization and Consent signed by JOHN SMITH
9/7/22 11:31 AM	John Smith		Uniform Residential Loan Application signed by JOHN SMITH
9/7/22 11:31 AM	John Smith		Virginia Disclosure of Terms of Mortgage Application signed by JOHN SMITH
9/7/22 11:31 AM	John Smith		IVES Request for Transcript of Tax Return signed by JOHN SMITH
9/7/22 11:31 AM	John Smith		Important Information About Procedures For Opening A New Account signed by JOHN SMITH

The toolbar at the top right of the main content area contains several icons: a green arrow pointing right, a PDF icon, a gold medal icon, a printer icon, a green circular refresh icon, and a yellow padlock icon. A blue arrow points from the text box above to the padlock icon, and another blue arrow points from the text box below to the refresh icon.

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



# eSign Console/Lender Portal

## Icons

The printer opens your printing options.

The screenshot displays the eSign Console interface for a loan. At the top, there is a navigation bar with tabs: Scheduler, Monitoring, Accounts, eSign Requests, Create Request, Search, and Account. Below this, a summary section shows loan details: Loan # 777090720220001, Lender Steve Truitt (DSI TEST LENDER (SALES) (100SALES)), Status In Progress (Active), Documents 16 (72 total pages), Signers 3, Expires N/A (Requires: Primary), and Signatures Y (Ink Sign). A secondary section has tabs for Details, Documents, Documents Received, EMail, and Versions. The 'Participants' table lists four individuals: John Smith (Borrower), Andy Agent (Settlement Agent), and Stephen Truitt (Other). Below the table is an 'Action Log' with columns for Date, User, IP Address, and Description, containing a series of system events and signatures. A callout box in the top right corner highlights a printer icon among other document management icons.

#	Name/Email	Role	Created	Started	Consented	Viewed	Completed
1	John Smith struitt@docmagic.com	Borrower	9/7/22 11:04 AM	9/7/22 11:19 AM	9/7/22 11:19 AM	9/7/22 11:19 AM	9/7/22 11:19 AM
3	Andy Agent struitt@docmagic.com	Settlement Agent	9/7/22 11:04 AM				
4	Stephen Truitt struitt21@gmail.com	Other	9/7/22 11:17 AM				

Date	User	IP Address	Description
9/7/22 11:04 AM	System User		eSign event created
9/7/22 11:04 AM	John Smith		Invitation sent to struitt@docmagic.com
9/7/22 11:04 AM	Andy Agent		Invitation sent to struitt@docmagic.com
9/7/22 11:17 AM	Steve Truitt		Stephen Truitt (struitt21@gmail.com) added as Other
9/7/22 11:17 AM	Stephen Truitt		Invitation sent to struitt21@gmail.com
9/7/22 11:19 AM	John Smith		Consented to DocMagic eSign
9/7/22 11:19 AM	John Smith		Receipt of early disclosures within 3 business days met
9/7/22 11:19 AM	John Smith		eSign event started
9/7/22 11:19 AM	John Smith		Initial Disclosure version 1 prepared on September 07, 2022, 11:04 AM PDT displayed
9/7/22 11:22 AM	Steve Truitt		Document batch upload completed
9/7/22 11:30 AM	System User		Date: 2022-09-07 11:30:09 InkSign Fax received for document: 5103643 ()
9/7/22 11:30 AM	John Smith		Authorization for the Social Security Administration to Release SSN Verification signed by John Smith
9/7/22 11:31 AM	John Smith		Approved electronic representation of signature
9/7/22 11:31 AM	John Smith		Approved electronic representation of signature
9/7/22 11:31 AM	John Smith		Borrower's Certification, Authorization and Consent signed by JOHN SMITH
9/7/22 11:31 AM	John Smith		Uniform Residential Loan Application signed by JOHN SMITH
9/7/22 11:31 AM	John Smith		Virginia Disclosure of Terms of Mortgage Application signed by JOHN SMITH
9/7/22 11:31 AM	John Smith		IVES Request for Transcript of Tax Return signed by JOHN SMITH
9/7/22 11:31 AM	John Smith		Important Information About Procedures For Opening A New Account signed by JOHN SMITH

You can view the DocMagic eSign certificate by clicking here.



# eSign Console/Lender Portal

## Certificate

The certificate mentioned previously downloads or opens as a PDF.

**DocMagic eSign Certificate**

eSign Id:	590176	Reference Id:	2906	From:	STEVE TRUITT	Status:	In Progress
Documents Type:	INITIAL DISCLOSURE	Loan Id:	777090720220001	Documents:	16	Signatures:	Y

**List of Signers**

Name/Email	Signature	Created Date	Started Date	Consented Date	Viewed Date	Completed Date
JOHN SMITH struitt@docmagic.com		09/07/22 11:04:27 AM	09/07/22 11:19:40 AM	09/07/22 11:19:40 AM	09/07/22 11:19:40 AM	09/07/22 11:31:52 AM
ANDY AGENT struitt@docmagic.com		09/07/22 11:04:28 AM				
STEPHEN TRUITT struitt221@gmail.com		09/07/22 11:17:26 AM				

**Audit Log**

Date/Time	Person	IP Address	Action
09/07/22 11:04:27 AM	SYSTEM USER		eSign event created
09/07/22 11:04:27 AM	JOHN SMITH	10.1.138.24	Invitation sent to struitt@docmagic.com
09/07/22 11:04:28 AM	ANDY AGENT	10.1.138.24	Invitation sent to struitt@docmagic.com
09/07/22 11:17:26 AM	STEPHEN TRUITT	10.1.10.201	Stephen Truitt (struitt221@gmail.com) added as Other
09/07/22 11:17:26 AM	STEPHEN TRUITT	10.1.10.201	Invitation sent to struitt221@gmail.com
09/07/22 11:19:39 AM	JOHN SMITH	10.1.10.201	Consented to DocMagic eSign
09/07/22 11:19:40 AM	JOHN SMITH	10.1.10.201	Receipt of early disclosures within 3 business days met
09/07/22 11:19:41 AM	JOHN SMITH	10.1.10.201	eSign event started
09/07/22 11:19:41 AM	JOHN SMITH	10.1.10.201	Initial Disclosure version 1 prepared on September 07, 2022, 11:04 AM PDT displayed
09/07/22 11:22:34 AM	STEVE TRUITT	10.1.138.22	Document batch upload completed
09/07/22 11:30:11 AM	SYSTEM USER		Date: 2022-09-07 11:30:09 InkSign Fax received for document: 5103643 ( )



# eSign Console/Lender Portal

## Icons

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

The screenshot displays the eSign Console interface for a loan. At the top, there's a navigation bar with tabs like Scheduler, Monitoring, Accounts, eSign Requests, Create Request, Search, and Account. Below this, a summary section shows loan details: Loan # 717090720220001, Lender Steve Truitt, and Status In Progress (Active). A table of participants follows, listing John Smith (Borrower), Andy Agent (Settlement Agent), and Stephen Truitt (Other). Below the participants is an Action Log table with columns for Date, User, IP Address, and Description. A toolbar at the bottom right contains several icons, with a red box highlighting the PDF icon. A blue arrow points from the text above to this icon.

#	Name/Email	Role	Created	Started	Consented	Viewed	Completed
1	John Smith struitt@docmagic.com	Borrower	9/7/22 11:04 AM	9/7/22 11:19 AM	9/7/22 11:19 AM	9/7/22 11:19 AM	9/7/22 11:19 AM
3	Andy Agent struitt@docmagic.com	Settlement Agent	9/7/22 11:04 AM				
4	Stephen Truitt struitt21@gmail.com	Other	9/7/22 11:17 AM				

Date	User	IP Address	Description
9/7/22 11:04 AM	System User		eSign event created
9/7/22 11:04 AM	John Smith		Invitation sent to struitt@docmagic.com
9/7/22 11:04 AM	Andy Agent		Invitation sent to struitt@docmagic.com
9/7/22 11:17 AM	Steve Truitt		Stephen Truitt (struitt21@gmail.com) added as Other
9/7/22 11:17 AM	Stephen Truitt		Invitation sent to struitt21@gmail.com
9/7/22 11:19 AM	John Smith		Consented to DocMagic eSign
9/7/22 11:19 AM	John Smith		Receipt of early disclosures within 3 business days met
9/7/22 11:19 AM	John Smith		eSign event started
9/7/22 11:19 AM	John Smith		Initial Disclosure version 1 prepared on September 07, 2022, 11:04 AM PDT displayed
9/7/22 11:22 AM	Steve Truitt		Document batch upload completed
9/7/22 11:30 AM	System User		Date: 2022-09-07 11:30:09 InkSign Fax received for document: 5103643 ()
9/7/22 11:30 AM	John Smith		Authorization for the Social Security Administration to Release SSN Verification signed by John Smith
9/7/22 11:31 AM	John Smith		Approved electronic representation of signature
9/7/22 11:31 AM	John Smith		Approved electronic representation of signature
9/7/22 11:31 AM	John Smith		Borrower's Certification, Authorization and Consent signed by JOHN SMITH
9/7/22 11:31 AM	John Smith		Uniform Residential Loan Application signed by JOHN SMITH
9/7/22 11:31 AM	John Smith		Virginia Disclosure of Terms of Mortgage Application signed by JOHN SMITH
9/7/22 11:31 AM	John Smith		IVES Request for Transcript of Tax Return signed by JOHN SMITH
9/7/22 11:31 AM	John Smith		Important Information About Procedures For Opening A New Account signed by JOHN SMITH

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.



# eSign Console/Lender Portal

## Create Request

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

The screenshot displays the eSign Console interface for a loan. The top navigation bar includes 'Scheduler', 'Monitoring', 'Accounts', 'eSign Requests', 'Create Request', 'Search', and 'Account'. The 'Create Request' button is highlighted with a blue box and a blue arrow pointing to the text box above.

**Loan Details:**

- Loan #: 777090720220001
- Primary Name: John Smith
- Type: Initial Disclosure
- 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
- Status: In Progress (Active)
- Documents: 16 (72 total pages)
- Signers: 3
- Expires: N/A (Requires: Primary)
- Signatures: Y (Ink Sign)

**Participants:**

#	Name/Email	Role	Created	Started	Consented	Viewed	Completed	Declined	Links	Preview Mode - Off
1	John Smith struitt@docmagic.com	Borrower	9/7/22 11:04 AM	9/7/22 11:19 AM	9/7/22 11:19 AM	9/7/22 11:19 AM	9/7/22 11:31 AM		Send Email Sign Documents	4506-C
3	Andy Agent struitt@docmagic.com	Settlement Agent	9/7/22 11:04 AM						Send Email Agent Portal	
4	Stephen Truitt struitt21@gmail.com	Other	9/7/22 11:17 AM						Send Email Sign Documents	

**Action Log:**

Date	User	IP Address	Description
9/7/22 11:04 AM	System User		eSign event created
9/7/22 11:04 AM	John Smith		Invitation sent to struitt@docmagic.com
9/7/22 11:04 AM	Andy Agent		Invitation sent to struitt@docmagic.com
9/7/22 11:17 AM	Steve Truitt		Stephen Truitt (struitt21@gmail.com) added as Other
9/7/22 11:17 AM	Stephen Truitt		Invitation sent to struitt21@gmail.com
9/7/22 11:19 AM	John Smith		Consented to DocMagic eSign
9/7/22 11:19 AM	John Smith		Receipt of early disclosures within 3 business days met
9/7/22 11:19 AM	John Smith		eSign event started
9/7/22 11:19 AM	John Smith		Initial Disclosure version 1 prepared on September 07, 2022, 11:04 AM PDT displayed
9/7/22 11:22 AM	Steve Truitt		Document batch upload completed
9/7/22 11:30 AM	System User		Date: 2022-09-07 11:30:09 InkSign Fax received for document: 5103643 ()
9/7/22 11:30 AM	John Smith		Authorization for the Social Security Administration to Release SSN Verification signed by John Smith
9/7/22 11:31 AM	John Smith		Approved electronic representation of signature
9/7/22 11:31 AM	John Smith		Approved electronic representation of signature
9/7/22 11:31 AM	John Smith		Borrower's Certification, Authorization and Consent signed by JOHN SMITH
9/7/22 11:31 AM	John Smith		Uniform Residential Loan Application signed by JOHN SMITH
9/7/22 11:31 AM	John Smith		Virginia Disclosure of Terms of Mortgage Application signed by JOHN SMITH
9/7/22 11:31 AM	John Smith		IVES Request for Transcript of Tax Return signed by JOHN SMITH
9/7/22 11:31 AM	John Smith		Important Information About Procedures For Opening A New Account signed by JOHN SMITH



# eSign Console/Lender Portal

## Create Request

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

The screenshot shows the 'Create Request' form in the eSign Console. The form is titled 'eSign Console - Steve Truitt' and has a navigation bar with 'Create Request', 'Search', and 'Account'. The form is divided into several sections: 'From: (You)' with fields for Email Address, First, Middle, Last, and Suffix; 'To: (Signers)' with fields for Email Address, First, Middle, Last, Suffix, and Code; 'Documents' with an 'Attach' button and a 'Prepare your document' button; 'Subject: optional' and 'Message: optional' text areas; and a checkbox for 'I have read and agree to the Terms of Use.'. At the bottom, there are 'Clear' and 'Submit' buttons. A blue arrow points from the 'Prepare your document' button to the text box above, and another blue arrow points from the 'Submit' button to the text box below.

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

