

eSign Console

Getting Started

The screenshot shows the DocMagic dashboard. At the top, there's a header with contact information (INFO@DOCMAGIC.COM, PHONE (800) 649-1362) and navigation links (SOLUTIONS, SERVICES, COMPLIANCE, SUPPORT, COMPANY). A search icon and buttons for 'REQUEST A DEMO' and 'DASHBOARD / LOG OUT' are also present. Below the header, a welcome message 'WELCOME ALAN! (#100SALES)' is displayed. The main content area is divided into three columns. The left column, titled 'Launch Center', contains a vertical stack of buttons: 'eSign Console' (highlighted with a blue arrow), 'AutoPrep™', 'DocMagic®', 'DocMagic® One', 'SmartCLOSE®', 'LoanMagic® Console', 'eVault', and 'SmartREGISTRY™'. The middle column, titled 'My Documents', contains four tiles: 'DOCUMENT FILES' (Access and manage your loan document files), 'FORM ANALYZER' (Access our extensive forms library for document management), 'STACKING ORDER' (Modify the order of documents in your packages), and 'LOAN DEFAULTS' (Manage charges, fees, premiums, impounds, and more). The right column, titled 'Account Settings', contains three sections: 'USERS' (Set up and manage user accounts and permissions), 'PLAN MANAGER' (Manage the loan programs for your account), and 'LENDER PROFILE' (Manage your company and contact information). Below these is a 'Latest News' section with three items: 'URLA: Updates, Improvements and Deadlines', 'Getting Started with eClose', and 'Closing a Loan Electronically'.

- Access the DocMagic Dashboard and open the eSign Console from the top of the Launch Center.

eSign Console

eSign Console - Scheduler Monitoring Accounts eSign Requests Create Request Search Account

Company Logo

Active Requests Showing 1 - 50 of 52

1 2 Next Show: 50

Loan # Document Set	Signer Email	Status Worksheet #	Ver	Created	CS	IS	RESPA	PDF	Archive
esigntesting3 Loan Estimate Documents	Bob B Sample (+1) jessaca@sample.com	Signed JESSESIGNTEST3	1	11/18/25 12:22 PM	✓				
esigntesting2 Loan Estimate Documents	Bob B Sample (+1) jessaca@sample.com	Signed JESSESIGNTEST2	4	11/18/25 12:16 PM	✓				
esigntesting2 Initial Disclosure	Bob B Sample (+1) jessaca@sample.com	Signed JESSESIGNTEST2	1	11/18/25 12:00 PM	✓				
777110720250002 Initial Disclosure	John Smith (+1) aland@docmagic.com	Signed 4099	1	11/18/25 11:41 AM	✓				
77711141258 Closing Documents	John Smith (+2) leah@docmagic.com	In Progress 4100	1	11/14/25 10:59 AM	✓				
★ 77711131425 Closing Documents	John Smith (+3) leah@docmagic.com	New 4097	1	11/13/25 12:34 PM	✓				
777101320250002 Closing Documents	John Smith (+2) aland@docmagic.com	Consented 4098	2	11/12/25 2:13 PM	✓				
777110720250001 Initial Disclosure	John Smith (+1) aland@docmagic.com	Printed 4097	1	11/12/25 1:16 PM	✓				
★ 777110720250001 Closing Documents	John Smith (+1) aland@docmagic.com	New 4097	1	11/12/25 1:13 PM	✓				
CONV Fixed Initials Sample.Copy Initial Disclosure	Kortney B Sample (+1) kharward@docmagic.com	Signed 4096	2	11/11/25 2:24 PM	✓				
77711111321 Closing Documents	John Smith (+2) leah@docmagic.com	Signed 4093	1	11/11/25 11:21 AM	✓				
★ 77711101335 Closing Documents	John Smith (+2) leah@docmagic.com	New 4091	1	11/10/25 11:38 AM	✓				
CONV Fixed Initials Sample Initial Disclosure	Bob B Sample (+1) mascencio@docmagic.com	In Progress 1709	8	11/7/25 1:16 PM	✓				

- You'll start with the list of Active eSign Requests. Click on any to view details.
- The icons on the left indicate *Status* – how far along the eSign request is. You can also find the Status of a package in the third column.
- A star icon ★ indicates that the request is *New*. The document package has been created but no one has viewed their documents or began signing.
- A gear icon ⚙ indicates that the request is *In Progress*. Some users may have completed their signing portions while others have not started.

eSign Console

eSign Console - Scheduler Monitoring Accounts **eSign Requests** Create Request Search Account

Company Logo

Active Requests Showing 1 - 50 of 52

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esigntesting2 Loan Estimate Documents	Bob B Sample (+1) jessaca@sample.com	Signed JESSESIGNTEST2	4	11/18/25 12:16 PM	✓				
esigntesting2 Initial Disclosure	Bob B Sample (+1) jessaca@sample.com	Signed JESSESIGNTEST2	1	11/18/25 12:00 PM	✓				
777110720250002 Initial Disclosure	John Smith (+1) aland@docmagic.com	Signed 4099	1	11/18/25 11:41 AM	✓				
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- The computer monitor with the check mark icon indicates that the participant(s) have *Consented* to the use of electronic signatures and eSign.
- The page with a check mark icon indicates that the document package has been *Signed* – all necessary signatures have been collected, and the package is considered complete.
- The green circle with a check mark icon indicates that the package has been *Printed* – a request, sometimes an automated one, has been to DocMagic's Print Fulfillment Center.

eSign Console

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Scheduler Monitoring Accounts eSign Requests Create Request Search Account

Company Logo

Active Requests Showing 1 - 50 of 52

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777110720250001 Closing Documents	John Smith (+2) aland@docmagic.com	New 4090	1	11/7/25 12:07 PM	✓				
777110620250001 Closing Documents	John Smith (+1) aland@docmagic.com	In Progress 4089	1	11/6/25 11:58 AM	✓				

- CS stands for Click Sign. All requests in the eSign Console will have this checked.
- If the package has an Ink Signed component included, then there will also be a corresponding check mark under IS.
- Click on the red and white icon to download a PDF copy of the package.
- Click on the green and white page icon to download a csv of the eSign requests displayed.
- Click on the lock icon to Archive the request. You can still find Archived requests with the Search function.

eSign Console

eSign Console									
Company Logo		Scheduler	Monitoring	Accounts	eSign Requests	Create Request	Search	Account	
Active Requests Showing 1 - 50 of 52									
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777110620250001 Closing Documents	John Smith (+1) aland@docmagic.com	In Progress 4089	1	11/6/25 11:58 AM	✓		⊖		

- The RESPA section tells you the status of certain time sensitive packages (disclosures).
- If the borrower views the electronic copy of the documentation within the time limits defined by TRID, then this requirement is fulfilled, and the Consented icon will be shown.
- If the borrower fails to view the documentation in time, *the request will automatically be sent to our Print Fulfillment center*, and the printer icon will be displayed.
- The grey icon indicates that the status is unknown or irrelevant.

Key Information

eSign Console

SchedulerMonitoringAccountseSign Requestscancel RequestSearchAccount

Loan #: 777042920260001

Primary Name: John Smith

Type: EClosing

Package Id: 1611159

Worksheet #: 4300 (Version : 1)

Closing Date: 4/29/26

Lender: Alan Dai

DSI TEST LENDER (SALES) (100SALES)

aland@docmagic.com

(800)649-1362

Status: New (Active)

Documents: 27 (80 total pages)

Signers: 3

Expires: N/A (Requires: Primary)

Signatures: Y

DetailsDocumentsDocuments ReceivedEMailsVersions

Participants

Preview Mode - Off

#	Name/Email	Role	Created	Started	Consented	Viewed	Completed	Declined	Links
1	John Smith aland@docmagic.com	Borrower	4/29/26 10:12 AM						Send Email Sign Documents
3	Byron Oden aland@docmagic.com	Settlement Agent	4/29/26 10:12 AM						Send Email Agent Portal
4	Notary_name_placeholder -1 NOTARY_EMAIL_PLACEHOLDER-1	Notary	4/29/26 10:12 AM						Send Email

Action Log

Date	User	IP Address	Description
4/29/26 10:12 AM	System User		eSign event created and expires on 04/29/2026
4/29/26 10:12 AM	John Smith		Invitation sent to aland@docmagic.com
4/29/26 10:12 AM	Byron Oden		Invitation sent to aland@docmagic.com

Add Internal Note

Cancel RequestDelete Request

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- Click on any package to view details.
- The grey banner at the top of the page displays:
 - Left: Key loan information
 - Middle: Lender details
 - Right: Key document package information including status
- If you need to contact DocMagic's Customer Service department regarding an eSign package, please provide the Package ID and worksheet number.

Details – Participants

eSign Console

SchedulerMonitoringAccountseSign Requestscancel RequestSearchAccount

Loan #: 777042920260001

Primary Name: John Smith

Type: EClosing

Package Id: 1611159

Worksheet #: 4300 (Version : 1)

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DetailsDocumentsDocuments ReceivedEMailsVersions

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4	Notary_name_placeholder -1 NOTARY_EMAIL_PLACEHOLDER-1	Notary	4/29/26 10:12 AM						Send Email

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4/29/26 10:12 AM	Byron Oden		Invitation sent to aland@docmagic.com

Add Internal Note

Cancel RequestDelete Request

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- You'll start in the Details Tab when you open an eSign package in the Console. The Participants section is directly under the tabs.
- You may see a Notary Name Placeholder on eClosing packages that include an eNotary component – one for each borrower until a notary is assigned.
 - Witness placeholders, when included in the package, are displayed the same way.

Details – Participants

eSign Console

SchedulerMonitoringAccountseSign RequestscCreate RequestSearchAccount

Loan #: 777042920260001
Primary Name: John Smith
Type: EClosing
Package Id: 1611159
Worksheet #: 4300 (Version : 1)
Closing Date: 4/29/26

Lender: Alan Dai
DSI TEST LENDER (SALES) (100SALES)
aland@docmagic.com
(800)649-1362

Status: New (Active)
Documents: 27 (80 total pages)
Signers: 3
Expires: N/A (Requires: Primary)

DetailsDocumentsDocuments

Participants

#	Name/Email
1	John Smith aland@docmagic.com
3	Byron Oden aland@docmagic.com
4	Notary_name_placeholder -1 NOTARY_EMAIL_PLACEHOLDER-1

Action Log

Date	User
4/29/26 10:12 AM	System
4/29/26 10:12 AM	John
4/29/26 10:12 AM	Byron

Add Participant

Please provide the information for the new participant.

First Name:

Witness

Last Name:

Test

Email:

aland@docmagic.com

Access Code:

3333

Role:

Witness

Add

Cancel

Add Internal Note

DeclinedLinks

Send Email

Sign Documents

Send Email

Agent Portal

Send Email

Cancel RequestDelete Request

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- Click on the Silhouette Icon to add a participant.
 - Fill out every line, then select a role for the participant.
 - Users will authenticate with the Access Code before they can view or eSign any documents.
 - Click "Add" and they will be saved to the Signers list.
 - You may add a witness to a package using this method.
 - Participants can be deleted only if they were added in this manner.

Details – Participants

eSign Console Scheduler Monitoring Accounts eSign Requests Create Request Search Account

Loan #: 777042920260001 Lender: Alan Dai Status: New (Active)
Primary Name: John Smith DSI TEST LENDER (SALES) (100SALES) Documents: 27 (80 total pages)
Type: EClosing 3
Package Id: 1611159 N/A (Requires: Primary)
Worksheet #: 4300 (Version : 1) Y
Closing Date: 4/29/26

Details Documents Documents R

Participants +

#	Name/Email
1	John Smith aland@docmagic.com
3	Byron Oden aland@docmagic.com
4	Notary_name_placeholder -1 NOTARY_EMAIL_PLACEHOLDER-1

Action Log

Date	User
4/29/26 10:12 AM	System
4/29/26 10:12 AM	John S
4/29/26 10:12 AM	Byron

Participant Details X

View, edit, or delete the participant's information below.

First Name: JOHN

Last Name: SMITH

Email:

Phone Number:

Access Code:

Role: Borrower

Cancel Delete Save

Preview Mode - Off

Declined	Links
	☒ Send Email ☒ Sign Documents
	☒ Send Email ☒ Agent Portal
	☒ Send Email

Cancel Request Delete Request

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- Click on a signer's name to view or edit their information.
 - The participant's role determines which fields can be edited.
 - For example, as shown on screen, a borrower's first name, last name, and role cannot be modified from your Console.
- If a borrower does have not a valid social security number, they may review and access their documents with an Access Code.

Details – Participants

The screenshot displays the 'eSign Console - Alan Dai' interface. A 'Participant Details' modal is open, showing information for a witness. The background interface includes a top navigation bar with links like 'Scheduler', 'Monitoring', 'Accounts', 'eSign Requests', 'Create Request', 'Search', and 'Account'. On the left, there's a sidebar with 'Details', 'Documents', and 'Documents F'. The main content area shows loan details (Loan #: 777093020260002, Lender: Alan Dai, Status: New (Active)), a list of participants (John Smith, Byron Oden, Notary_name_placeholder -1, Witness Test), and an 'Action Log' table.

Participant Details Modal:

View, edit, or delete the participant's information below.

First Name: Witness

Last Name: Test

Email: aland@docmagic.com

Phone Number: () -

Access Code: 3333

Role: Witness

Buttons: Cancel, Delete, Save

Action Log:

Date	User	Action
10/1/26 2:18 PM	System Us	
10/1/26 2:18 PM	John Smith	
10/1/26 2:18 PM	Byron Ode	
10/1/26 2:19 PM	Alan Dai	Witness Test (aland@docmagic.com) added as Witness
10/1/26 2:19 PM	Witness Test	Invitation sent to aland@docmagic.com

Buttons: Add Internal Note, Cancel Request, Delete Request

- A Witness Placeholder is a temporary participant created when the actual witness is unknown at the time the Closing Package is generated.
- Once a witness has been identified, click the on their name ("Witness Test") and update the witness information.
- All witness fields can be modified, including the first and last name, as per the image shown.

Details – Participants

eSign Console

SchedulerMonitoringAccountseSign RequestsCreate RequestSearchAccount

Loan #: 777042920260001

Primary Name: John Smith

Type: EClosing

Package Id: 1611159

Worksheet #: 4300 (Version : 1)

Closing Date: 4/29/26

Lender: Alan Dai

DSI TEST LENDER (SALES) (100SALES)

aland@docmagic.com

(800)649-1362

Status: New (Active)

Documents: 27 (80 total pages)

Signers: 3

Expires: N/A (Requires: Primary)

Signatures: Y

DetailsDocumentsDocuments ReceivedEMailsVersions

Participants

#	Name/Email	Role	Created	Started	Consented	Viewed	Completed	Declined	Links
1	John Smith aland@docmagic.com	Borrower	4/29/26 10:12 AM						Send Email Sign Documents
3	Byron Oden aland@docmagic.com	Settlement Agent	4/29/26 10:12 AM						Send Email Agent Portal
4	Notary_name_placeholder -1 NOTARY_EMAIL_PLACEHOLDER-1	Notary	4/29/26 10:12 AM						Send Email

Action Log

Date	User	IP Address	Description
4/29/26 10:12 AM	System User		eSign event created and expires on 04/29/2026
4/29/26 10:12 AM	John Smith		Invitation sent to aland@docmagic.com
4/29/26 10:12 AM	Byron Oden		Invitation sent to aland@docmagic.com

Add Internal Note

Cancel Request

Delete Request

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- The eSign Console allows you to track progress for each participant.
- Created refers to the moment that the participant was created. All participants generated with the creation of the package will have the same created timestamp as the package itself.

Details – Participants

Loan #: 777042920260001

Primary Name: John Smith

Type: EClosing

Package Id: 1611159

Worksheet #: 4300 (Version : 1)

Closing Date: 4/29/26

Lender: Alan Dai

DSI TEST LENDER (SALES) (100SALES)

aland@docmagic.com

(800)649-1362

Status: New (Active)

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Signers: 3

Expires: N/A (Requires: Primary)

Signatures: Y

Details

Documents

Documents Received

E-mails

Versions

Participants

#

Name/Email

Role

Created

Started

Consented

Viewed

Completed

Declined

Links

1

John Smith
aland@docmagic.com

Borrower

4/29/26
10:12 AM

Send Email

Sign Documents

3

Byron Oden
aland@docmagic.com

Settlement Agent

4/29/26
10:12 AM

Send Email

Agent Portal

4

Notary_name_placeholder -1
NOTARY_EMAIL_PLACEHOLDER-1

Notary

4/29/26
10:12 AM

Send Email

Action Log

Date

User

IP Address

Description

4/29/26 10:12 AM

System User

eSign event created and expires on 04/29/2026

4/29/26 10:12 AM

John Smith

Invitation sent to aland@docmagic.com

4/29/26 10:12 AM

Byron Oden

Invitation sent to aland@docmagic.com

Add Internal Note

Cancel Request

Delete Request

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- Started refers to the moment a participant began their workflow (usually triggers at the same time as “Viewed”).
- Consented refers to the moment a signer agreed to DocMagic’s eSign Disclosure and Consent form, which must be given before documents can be accessed. If a participant gave consent during their Initial Disclosures, this consent would carry over to their Closing Package.
- Viewed refers to the moment a participant viewed their documents.
- These three events will often share the same timestamp.

DocMagic

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Details – Participants

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[Monitoring](#)
[Accounts](#)
[eSign Requests](#)
[Create Request](#)
[Search](#)
[Account](#)

Loan #: 777042920260001

Primary Name: John Smith

Type: EClosing

Package Id: 1611159

Worksheet #: 4300 (Version : 1)

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Documents

Documents Received

EMails

Versions

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Preview Mode - Off

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Cancel Request

Delete Request

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- Completed refers to the moment a signer completed their eSign workflow (all signatures collected).
- Declined refers to the moment a signer withdrew their consent from the eSign room. They will be unable to view or sign their documents electronically and will receive a copy in the mail.

Details – Participants

eSign Console

SchedulerMonitoringAccountseSign RequestsCreate RequestSearchAccount

Loan #: 777042920260001

Primary Name: John Smith

Type: EClosing

Package Id: 1611159

Worksheet #: 4300 (Version : 1)

Closing Date: 4/29/26

Lender: Alan Dai

DSI TEST LENDER (SALES) (100SALES)

aland@docmagic.com

(800)649-1362

Status: New (Active)

Documents: 27 (80 total pages)

Signers: 3

Expires: N/A (Requires: Primary)

Signatures: Y

DetailsDocumentsDocuments ReceivedEMailsVersions

Participants

#	Name/Email	Role	Created	Started	Consented	Viewed	Completed	Declined	Links
1	John Smith aland@docmagic.com	Borrower	4/29/26 10:12 AM						Send Email Sign Documents
3	Byron Oden aland@docmagic.com	Settlement Agent	4/29/26 10:12 AM						Send Email Agent Portal
4	Notary_name_placeholder -1 NOTARY_EMAIL_PLACEHOLDER-1	Notary	4/29/26 10:12 AM						Send Email

Action Log

Date	User	IP Address	Description
4/29/26 10:12 AM	System User		eSign event created and expires on 04/29/2026
4/29/26 10:12 AM	John Smith		Invitation sent to aland@docmagic.com
4/29/26 10:12 AM	Byron Oden		Invitation sent to aland@docmagic.com

Add Internal Note

Cancel Request

Delete Request

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- Resend the corresponding invitation email to “remind” a participant to access their eSign documents or eClose Console in the case of the Settlement Agent by clicking Send Email under Links on the right.
- Sign Documents allows you to open that Participant’s signing experience in another tab – this assumes that the Participant is with you.
- If there is a Settlement Agent involved, you may also enter their portal from here.
- Notary Name Placeholders will be present for eClosing packages with an eNotary component. You will see one placeholder per borrower until a notary is confirmed.

Details – Icons

eSign Console -

SchedulerMonitoringAccountseSign RequestscCreate RequestSearchAccount

Loan #: 777050620260008

Primary Name: John Smith

Type: InitialDisclosure

Package Id: 1620511

Worksheet #: 4324 (Version : 1)

Closing Date: 5/11/26

Lender: Alan Dai

DSI TEST LENDER (SALES) (100SALES)

aland@docmagic.com

(800)649-1362

Status: Printed (Active)

Documents: 22 (80 total pages)

Signers: 3

Expires: 5/7/26, 10:18 PM (Requires: Primary)

Signatures: Y

DetailsDocumentsDocuments ReceivedEMailsVersions



Participants

#	Name/Email	Role	Created	Started	Consented	Viewed	Completed	Declined	Links
1	John Smith aland@docmagic.com	Borrower	5/6/26 4:18 PM						 Send Email  Sign Documents
2	Sandy Smith aland@docmagic.com	Borrower	5/6/26 4:18 PM						 Send Email  Sign Documents
4	Byron Oden acarlson@docmagic.com	Settlement Agent	5/6/26 4:18 PM						 Send Email  Agent Portal

Action Log

Date	User	IP Address	Description
5/6/26 4:18 PM	System User		eSign event created
5/6/26 4:18 PM	John Smith		Invitation sent to aland@docmagic.com
5/6/26 4:18 PM	Sandy Smith		Invitation sent to aland@docmagic.com
5/6/26 4:18 PM	Byron Oden		Invitation sent to acarlson@docmagic.com
5/6/26 4:28 PM	Alan Dai		Alan Dai requested a paper copy of the documents

Print Copy Transaction Log

Version	Requested	DSI Printed	DSI Mailed	Requester	Transaction ID
1	5/6/26, 4:28:46 PM PDT			Alan Dai	470494

Add Internal Note

- You will find six additional icons towards the top right of the Console.
 -  The Print/Mail icon sends a request to our Print Fulfillment Center for a paper copy of the document package to be printed and mailed to the borrower(s). An entry will be recorded in the Action Log, and in the Print Copy Transaction Log that appears below when you make the request.
 -  The PDF icon allows you to download a PDF of the entire document stack with all signatures that have been collected at the time of the request.

Details – Icons

eSign Console -

SchedulerMonitoringAccountseSign RequestscCreate RequestSearchAccount

Loan #: 777050620260008

Primary Name: John Smith

Type: InitialDisclosure

Package Id: 1620511

Worksheet #: 4324 (Version : 1)

Closing Date: 5/11/26

Lender: Alan Dai

DSI TEST LENDER (SALES) (100SALES)

aland@docmagic.com

(800)649-1362

Status: Printed (Active)

Documents: 22 (80 total pages)

Signers: 3

Expires: 5/7/26, 10:18 PM (Requires: Primary)

Signatures: Y

DetailsDocumentsDocuments ReceivedEMailsVersions



Participants

Preview Mode - Off

#	Name/Email	Role	Created	Started	Consented	Viewed	Completed	Declined	Links
1	John Smith aland@docmagic.com	Borrower	5/6/26 4:18 PM						Send Email Sign Documents
2	Sandy Smith aland@docmagic.com	Borrower	5/6/26 4:18 PM						Send Email Sign Documents
4	Byron Oden acarlson@docmagic.com	Settlement Agent	5/6/26 4:18 PM						Send Email Agent Portal

Action Log

Date	User	IP Address	Description
5/6/26 4:18 PM	System User		eSign event created
5/6/26 4:18 PM	John Smith		Invitation sent to aland@docmagic.com
5/6/26 4:18 PM	Sandy Smith		Invitation sent to aland@docmagic.com
5/6/26 4:18 PM	Byron Oden		Invitation sent to acarlson@docmagic.com
5/6/26 4:28 PM	Alan Dai		Alan Dai requested a paper copy of the documents

Print Copy Transaction Log

Version	Requested	DSI Printed	DSI Mailed	Requester	Transaction ID
1	5/6/26, 4:28:46 PM PDT			Alan Dai	470494

Add Internal Note

Cancel Request

Delete Request

- Click on the ribbon icon to view the eSign Certificate.
- The printer icon allows you to print a summary of the eSign Console on a local printer – it does not print the documents nor send a request to our fulfillment center.
- The lock icon allows you to archive the package. You can still find the package using the search function.
- Finally, you can cancel an eSign request or permanently delete one from the bottom right.

Details – Preview Mode

eSign Console -

SchedulerMonitoringAccountseSign Request>Create RequestSearchAccount

Loan #: 777042920260004

Primary Name: John Smith

Type: EClosing

Package Id: 1611531

Worksheet #: 4304 (Version : 1)

Closing Date: 4/30/26

Lender: Alan Dai

DSI TEST LENDER (SALES) (100SALES)

aland@docmagic.com

(800)649-1362

Status: New (Active)

Documents: 27 (80 total pages)

Signers: 3

Expires: N/A (Requires: Primary)

Signatures: Y

DetailsDocumentsDocuments ReceivedEMailsVersions

Preview Mode - On

Participants

#	Name/Email	Role	Created	Started	Consented	Viewed	Completed	Declined	Links
1	John Smith aland@docmagic.com	Borrower	4/29/26 3:40 PM						Send Email Preview Documents
3	Byron Oden aland@docmagic.com	Settlement Agent	4/29/26 3:40 PM						Send Email Agent Portal
4	Notary_name_placeholder -1 NOTARY_EMAIL_PLACEHOLDER-1	Notary	4/29/26 3:40 PM						Send Email

Action Log

Date	User	IP Address	Description
4/29/26 3:40 PM	System User		eSign event created and expires on 04/30/2026
4/29/26 3:40 PM	System User		Preview Mode enabled until 04/30/2026
4/29/26 3:40 PM	John Smith		Invitation sent to aland@docmagic.com
4/29/26 3:40 PM	Byron Oden		Invitation sent to aland@docmagic.com

Add Internal Note

Cancel RequestDelete Request

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- Preview Mode allows borrowers to view their Closing Packages before they can sign – “Preview Mode – On”.
- You may need to reach out to DocMagic support to enable Preview Mode – it may not be switched on by default.
- Please note that other participants such as the Settlement Agent may still sign when Preview Mode is on.
- Preview Mode will automatically turn off at midnight Hawaii time on the day closing (6am ET). Borrowers will get an email containing a link that allows them to sign all their closing documents that do not need to be signed in the presence of a notary.

Details – Preview Mode

Loan #: 777042920260004

Primary Name: John Smith

Type: EClosing

Package Id: 1611531

Worksheet #: 4304 (Version : 1)

Closing Date: 4/30/26

Details |
 Documents |
 Documents Received

Participants

#	Name/Email	Role	Created	Started	Consented	Viewed	Completed	Declined	Links
1	John Smith aland@docmagic.com	Borrower	4/29/26 3:40 PM						Send Email Preview Documents
3	Byron Oden aland@docmagic.com	Settlement Agent	4/29/26 3:40 PM						Send Email Agent Portal
4	Notary_name_placeholder-1 NOTARY_EMAIL_PLACEHOLDER-1	Notary	4/29/26 3:40 PM						Send Email

Action Log

Date	User	IP Address	Description
4/29/26 3:40 PM	System User		eSign event created and expires on 04/30/2026
4/29/26 3:40 PM	System User		Preview Mode enabled until 04/30/2026
4/29/26 3:40 PM	John Smith		Invitation sent to aland@docmagic.com
4/29/26 3:40 PM	Byron Oden		Invitation sent to aland@docmagic.com

Add Internal Note

Cancel Request |
 Delete Request

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 [Terms of Use](#)

- You can also manually turn off Preview Mode by clicking on it and toggling the On/Off switch.
- By default, the Settlement Agent and Notary may also toggle Preview Mode. Please reach out to support to disable this privilege.

Details – Action Log

Loan #: 777042920260005

Primary Name: John Smith

Type: InitialDisclosure

Package Id: 1611534

Worksheet #: 4305 (Version : 1)

Closing Date: 4/30/26

Lender: Alan Dai

DSI TEST LENDER (SALES) (100SALES)

aland@docmagic.com

(800)649-1362

Status: Printed (Active)

Documents: 17 (67 total pages)

Signers: 2

Expires: 4/29/26, 3:52 PM (Requires: Primary)

Signatures: Y

DetailsDocumentsDocuments ReceivedEMailsVersions

Preview Mode - Off

Participants

#	Name/Email	Role	Created	Started	Consented	Viewed	Completed	Declined	Links
1	John Smith aland@docmagic.com	Borrower	4/29/26 3:52 PM						Send Email Sign Documents
3	Byron Oden aland@docmagic.com	Settlement Agent	4/29/26 3:52 PM						Send Email Agent Portal

Action Log

Date	User	IP Address	Description
4/29/26 3:52 PM	System User		eSign event created
4/29/26 3:52 PM	John Smith		Invitation sent to aland@docmagic.com
4/29/26 3:52 PM	System User		eSign event expired
4/29/26 3:52 PM	Byron Oden		Invitation sent to aland@docmagic.com
4/29/26 3:54 PM	System User		Manually Added Entry

Print Copy Transaction Log

Version	Requested	DSI Printed	DSI Mailed	Requester	Transaction ID
1	4/29/26, 3:52:51 PM PDT			System User	469413

Click here to manually add an entry to the Action Log!

Add Internal Note

Cancel Request

Delete Request

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- The Action Log at the bottom creates a record for every event in this document package. You can manually add entries at the bottom.
- If you are about to hit a 3-business day TRID rule with regards to delivering a document package to a borrower on time, our system will automatically cancel the eSign request and send the document package to our print fulfillment center.
- The Action Log will state that the action was performed by "System User", but no person is triggering this event – it is fully automated. Note the Print Copy Transaction Log – this will appear when a Print Fulfillment request is made or triggered.

DocMagic

20

Documents

eSign Console - Alan Dai Scheduler Monitoring Accounts eSign Requests Create Request Search Account

[Return to Search](#)

Loan #: **61604150004**
Primary Name: **Jane Smith**
Type: **EClosing**
Package Id: **1620364**
Worksheet #: **4318** (Version : 1)
Closing Date: **5/6/26**

Lender: **Andrea Carlson**
DSI TEST LENDER (SALES) (100SALES)
acarlson@docmagic.com
8006491362

Status: **Signed (Active)**
Documents: **29** (85 total pages)
Signers: **2**
Expires: **N/A** (Requires: Primary)
Signatures: **Y (Ink Sign)**

Details Documents Documents Received EMail Versions

Documents

Document Name	ClickSign	Page(s)	Mark(s)	Signer(s)	Completed	Signreq Document Id Document Id	Filename	Delete	Operation
1 Multistate Fixed Rate Note		4/4	1	1	✓	9735805 9758209	us3200.not.xml		
2 New Jersey Addendum to Residential Mortgage Loan Application	✓	1	4	1	✓	9735806 9758210	njarmla.msc.xml		
3 Uniform Residential Loan Application	✓	9	8	1	✓	9735807 9758211	1003.ltr.xml		
4 New Jersey Mortgage (MERS)		19/19	1	1	✓	9735808 9758212	nj3031.mzm.xml		
5 General Closing Instructions	✓	2	2	1	✓	9735809 9758213	gci.msc.xml		
6 Specific Closing Instructions	✓	4	6	2	✓	9735810 9758214	sci.msc.xml		
7 Borrower's Certification, Authorization and Consent	✓	2	1	1	✓	9735811 9758215	bcac.msc.xml		
8 Certificate of Loans to One Borrower	✓	2	14	1	✓	9735812 9758216	collob.msc.xml		
9 Hazard Insurance Authorization and Requirements	✓	2	1	1	✓	9735813 9758217	hazard8.lsr.xml		
10 IVES Request for Transcript of Tax Return	✓	2	3	1	✓	9735814 9758218	4506c.msc-alt.xml		
11 W9 - Payers Request for Taxpayer ID	✓	6	1	1	✓	9735815 9758219	w9.msc.xml		
12 Acknowledgment of Receipt of Appraisal Report	✓	1	1	1	✓	9735816 9758220	arar2.msc.xml		
13 Closing Disclosure	✓	5	1	1	✓	9735817 9758221	cd.dsc.xml		
14 Compliance Agreement		2/2	1	1	✓	9735818 9758222	comp.lsr.xml		
15 Customer Identification Verification	✓	2	0	0	✓	9735819 9758223	civ.msc.xml		
16 Federal Equal Credit Opportunity Act Notice (ECOA)	✓	1	1	1	✓	9735820 9758224	ecoa.lsr.xml		
17 Hardship Letter	✓	1	1	1	✓	9735821 9758225	h.lsr.xml		
18 Impound Authorization	✓	2	3	1	✓	9735822 9758226	ia.msc.xml		

- The Documents Tab displays a breakdown of the individual documents that are to be signed as part of the document package.
- Click on any document name to download a PDF copy of the document.
- A *lack* of green check mark under the Click Sign column indicates that the document will need to be ink signed. You will see these for Hybrid eClose packages.
- A green check mark under the Completed column indicates that all signatures have been collected for that document.

Documents

Loan #: 777042920260004

Primary Name: John Smith

Type: EClosing

Package Id: 1611531

Worksheet #: 4304 (Version : 1)

Closing Date: 4/30/26

Lender: Alan Dai

DSI TEST LENDER (SALES) (100SALES)

aland@docmagic.com

(800)649-1362

Status: New (Active)

Documents: 27 (80 total pages)

Signers: 3

Expires: N/A (Requires: Primary)

Signatures: Y

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 Multistate Fixed Rate Electronic Note	✓	4	1	1			9707329 9729507	us3200.not-sd.ftl		
2 New Jersey Addendum to Residential Mortgage Loan Application	✓	1	4	1			9707330 9729508	njarmla.msc.xml		
3 Uniform Residential Loan Application	✓	8	7	1			9707331 9729509	1003.ltr.xml		
4		10	2				9707332 9729510	nj3031.mzm.xml		
5		2	1				9707333 9729511	gci.msc.xml		
6		6	2				9707334 9729512	sci.msc.xml		
7		1	1				9707335 9729513	bcac.msc.xml		
8		14	1				9707336 9729514	coltob.msc.xml		
9		1	1				9707337 9729515	hazard8.lsr.xml		
10		3	1				9707338 9729516	4506c.msc-alt.xml		
11		1	1				9707339 9729517	w9.msc.xml		
12 Acknowledgment of Receipt of Appraisal Report	✓	1	1	1			9707340 9729518	arar2.msc.xml		
13 Closing Disclosure	✓	5	1	1			9707341 9729519	cd.dsc.xml		
14 Compliance Agreement	✓	2	10	2			9707342 9729520	comp.lsr.xml		
15 Customer Identification Verification	✓	2	73	1			9707343 9729521	civ.msc-notary.xml		
16 Federal Equal Credit Opportunity Act Notice (ECOA)	✓	1	1	1			9707344 9729522	ecoa.lsr.xml		
17 Impound Authorization	✓	2	3	1			9707345 9729523	ia.msc.xml		
18 Initial Escrow Account Disclosure Statement	✓	2	1	1			9707346 9729524	ieads.msc.xml		
19 New Jersey Choice of Insurance Notice	✓	1	1	1			9707347 9729525	njcoin.msc.xml		
20 New Jersey Initial Tax Authorization Notice	✓	1	0	0	✓		9707348 9729526	njitan.msc.xml		

Upload a new document

Document

Browse

Submit

Cancel

- The Plus icon allows you to add documents to packages post generation.
- Click Browse to select a document from your computer and then click the blue Submit button. This will upload your document and activate [AutoPrep](#) – our proprietary auto-tagging tool.

Documents

Loan #: 777042920260004

Primary Name: John Smith

Type: EClosing

Package Id: 1611531

Worksheet #: 4304 (Version : 1)

Closing Date: 4/30/26

Lender: Alan Dai

DSI TEST LENDER (SALES) (100SALES)

aland@docmagic.com

(800)649-1362

Status: New (Active)

Documents: 27 (80 total pages)

Signers: 3

Expires: N/A (Requires: Primary)

Signatures: Y

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 Multistate Fixed Rate Electronic Note	✓	4	1	1			9707329 9729507	us3200.not-sd.ftl		
2 New Jersey Addendum to Residential Mortgage Loan Application	✓	1	4	1			9707330 9729508	njarmla.msc.xml		
3 Uniform Residential Loan Application	✓	8	7	1			9707331 9729509	1003.ltr.xml		
4 New Jersey Mortgage (MERS)	✓	18	10	2			9707332 9729510	nj3031.mzm.xml		
5 General Closing Instructions	✓	2	2	1			9707333 9729511	gci.msc.xml		
6 Specific Closing Instructions	✓	4	6	2			9707334 9729512	sci.msc.xml		
7 Borrower's Certification, Authorization and Consent	✓	2	1	1			9707335 9729513	bcac.msc.xml		
8 Certificate of Loans to One Borrower	✓	2	14	1			9707336 9729514	coltob.msc.xml		
9 Hazard Insurance Authorization and Requirements	✓	2	1	1			9707337 9729515	hazard8.lsr.xml		
10 IVES Request for Transcript of Tax Return	✓	2	3	1			9707338 9729516	4506c.msc-alt.xml		
11 W9 - Payers Request for Taxpayer ID	✓	6	1	1			9707339 9729517	w9.msc.xml		
12 Acknowledgment of Receipt of Appraisal Report	✓	1	1	1			9707340 9729518	arar2.msc.xml		
13 Closing Disclosure	✓	5	1	1			9707341 9729519	cd.dsc.xml		
14 Compliance Agreement	✓	2	10	2			9707342 9729520	comp.lsr.xml		
15 Customer Identification Verification	✓	2	73	1			9707343 9729521	civ.msc-notary.xml		
16 Federal Equal Credit Opportunity Act Notice (ECOA)	✓	1	1	1			9707344 9729522	ecoa.lsr.xml		
17 Impound Authorization	✓	2	3	1			9707345 9729523	ia.msc.xml		
18 Initial Escrow Account Disclosure Statement	✓	2	1	1			9707346 9729524	ieads.msc.xml		
30 1JohnSandySmith_Title_Docs	✓				21	6	3			

- After completing the AutoPrep workflow, return to the eSign Console and refresh the page.
- Click on the Documents Tab and your newly added document will be on the bottom.
- You can also remove this document if you want by clicking on the Trash icon to the far right.

Documents

Loan #: 777042920260004 Lender: Alan Dai Status: New (Active)

Primary Name: John Smith
Type: EClosing
Package Id: 1611531
Worksheet #: 4304 (Version :
Closing Date: 4/30/26

Multistate Fixed Rate Electronic Note
Prepare documents for signing.

Details Documents Documents

Document Name

1	Multistate Fixed Rate Electronic Note
2	New Jersey Addendum to Residential Mortgage
3	Uniform Residential Loan Application
4	New Jersey Mortgage (MERS)
5	General Closing Instructions
6	Specific Closing Instructions
7	Borrower's Certification, Authorization and Acknowledgment
8	Certificate of Loans to One Borrower
9	Hazard Insurance Authorization
10	IVES Request for Transcript of Records
11	W9 - Payers Request for Taxpayer Identification Number and Certification
12	Acknowledgment of Receipt of Funds
13	Closing Disclosure
14	Compliance Agreement
15	Customer Identification Verification
16	Federal Equal Credit Opportunity Act
17	Impound Authorization
18	Initial Escrow Account Disclosure
19	New Jersey Choice of Insurance Notice
20	New Jersey Initial Tax Authorization Notice

Multistate Fixed Rate Electronic Note

MIN: 999935323202600010 Loan Number: 777042920260004

NOTE
(For Electronic Signature)

April 15, 2026 CITY CALIFORNIA
[Date] [City] [State]

7755 JOHN Q HAMMONS DR, FRISCO, NJ 75034
[Property Address]

1. BORROWER'S PROMISE TO PAY
In return for a loan in the amount of U.S. \$ 145,000.00 (the "Principal") that I have received from DSI TEST LENDER (SALES), A CALIFORNIA CORPORATION (the "Lender"), I promise to pay the Principal, plus interest, to the order of the Lender. I will make all payments under this Note in U.S. currency in the form of cash, check, money order, or other payment method accepted by Lender.
I understand that the Lender may transfer this Note. The Lender or anyone who takes this Note by transfer and who is entitled to receive payments under this Note is called the "Note Holder."

2. INTEREST
Interest will be charged on unpaid Principal until the full amount of the Principal has been paid. I will pay interest at a yearly rate of 5.250 %.
The interest rate required by this Section 2 is the rate I will pay both before and after any default described in Section 6(B) of this Note.

3. PAYMENTS
(A) Time and Place of Payments
I will pay principal and interest by making a payment every month. This amount is called my "Monthly Payment."
I will make my Monthly Payment on the 1st day of each month beginning on June 01, 2026. I will make these payments every month until I have paid all of the Principal and interest and any other charges described below that I may owe under this Note. Each Monthly Payment will be applied as of its scheduled due date and will be applied to interest before the Principal. If, on May 01, 2056, I still owe amounts under this Note, I will pay those amounts on that date, which is called the "Maturity Date."
I will make my Monthly Payments at 1800 W. 213TH STREET, TORRANCE, CA 90501 or at a different place if required by the Note Holder.

(B) Amount of Monthly Payments
My Monthly Payment will be in the amount of U.S. \$ 800.70. This payment amount does not include any property taxes, insurance, or other charges that I may be required to pay each month.

4. BORROWER'S RIGHT TO PREPAY
I have the right to make payments of principal at any time before they are due. A payment of principal only is known as a "Prepayment." When I make a Prepayment, I will notify the Note Holder in writing that I am doing so. I may not designate a payment as a Prepayment if I have not made all the Monthly Payments then due under this Note.

Signature & Initials
Signature
Initials
PostFill
Notary

19	New Jersey Choice of Insurance Notice	✓	1	1	1	9707347 9729525	njcoin.msc.xml
20	New Jersey Initial Tax Authorization Notice	✓	1	0	0	9707348 9729526	njitax.msc.xml

- The Pencil icon allows you to view, edit, and add tags for the entire package. The Document Editor will open in another window. Click [here](#) for the full guide.
- Please note that you may not edit any tags that were originally generated with the package – they will be greyed out. However, you can use the toolbox on the right to add additional tags.
- Please note that if a witness is involved, they must have at least one signature tag assigned to them or else they will not be able to participate.

Documents Received

eSign Console - Alan Dai

SchedulerMonitoringAccountseSign RequestscCreate RequestSearchAccount

Loan #: 777050420260003

Primary Name: John Smith

Type: EClosing

Package Id: 1618957

Worksheet #: 4310 (Version : 1)

Closing Date: 5/6/26

Lender: Alan Dai

DSI TEST LENDER (SALES)
(100SALES)

aland@docmagic.com
(800)649-1362

Status: New (Active)

Documents: 28 (81 total pages)

Signers: 2

Expires: N/A (Requires: Primary)

Signatures: Y (Ink Sign)

DetailsDocumentsDocuments ReceivedEEmailsVersions

#PreviewPDFUploadedDocumentOperation

1



5/4/26, 4:15 PM

Please select document

Please select document

Multistate Fixed Rate Note Page 1

Multistate Fixed Rate Note Page 2

Multistate Fixed Rate Note Page 3

Multistate Fixed Rate Note Page 4

New Jersey Mortgage (MERS) Page 1

New Jersey Mortgage (MERS) Page 2

New Jersey Mortgage (MERS) Page 3

New Jersey Mortgage (MERS) Page 4

New Jersey Mortgage (MERS) Page 5

New Jersey Mortgage (MERS) Page 6

New Jersey Mortgage (MERS) Page 7

New Jersey Mortgage (MERS) Page 8

New Jersey Mortgage (MERS) Page 9

Cancel RequestDelete Request

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- Documents Received contains unrecognized uploads that were received from a print and sign upload – usually as part of the Settlement Agent’s print and sign workflow for a Hybrid eClose.
- You may need to identify these documents individually for the system to recognize them.

DocMagic

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Emails

eSign Console - Alan Dai
Scheduler
Monitoring
Accounts
eSign Requests
Create Request
Search
Account

Loan #: 777042320260001
Primary Name: John Smith
Type: EClosing
Package Id: 1604096
Worksheet #: 4284 (Version : 1)
Closing Date: 4/23/26

Lender: Alan Dai
DSI TEST LENDER (SALES) (100SALES)
aland@docmagic.com
(800)649-1362

Status: Signed (Active)
Documents: 36 (130 total pages)
Signers: 5
Expires: N/A (Requires: Primary)
Signatures: Y

Details
Documents
Documents Received
E-mails
Versions
Recordings

Emails

Created	Event	To:	CC:	Status
4/23/26, 9:53 AM	SendInvitation	aland@docmagic.com		Created
4/23/26, 9:53 AM	SendInvitation	acarlson@docmagic.com		Created
4/23/26, 9:53 AM	SendInvitation	aland@docmagic.com		Created
4/23/26, 9:53 AM	SendInvitation	acarlson@docmagic.com		Created
4/23/26, 9:53 AM	SendInvitation	aland@docmagic.com		Created
4/23/26, 9:53 AM	SendInvitation	aland@docmagic.com		Created
4/23/26, 9:54 AM	ConsentEsign	aland@docmagic.com		Created
4/23/26, 9:54 AM	ConsentEsign	acarlson@docmagic.com		Created
4/23/26, 9:56 AM	ConsentEsign	aland@docmagic.com		Created
4/23/26, 9:56 AM	ConsentEsign	acarlson@docmagic.com		Created
4/23/26, 10:11 AM	Notary Invitation Requested	ron-test@docmagic.com		Created
4/23/26, 10:12 AM	Notary Invitation Accepted	ron-test@docmagic.com		Created
4/23/26, 10:12 AM	Notary Invitation Accepted	aland@docmagic.com		Created
4/23/26, 10:12 AM	Notary Comment Received	aland@docmagic.com		Created
4/23/26, 10:14 AM	eClosing Scheduled	aland@docmagic.com		Created
4/23/26, 10:20 AM	Ready To Close	acarlson@docmagic.com		Created

- Emails contains a chronological listing of every email sent out as part of the document package.

Versions



SchedulerMonitoringAccountseSign RequestseSign RequestsCreate RequestSearchAccount

Loan #: 777042320260005

Primary Name: John Smith

Type: Loan Estimate

Package Id: 1604299

Worksheet #: 4289 (Version : 1)

Closing Date: 4/27/26

Lender: Alan Dai

DSI TEST LENDER (SALES)

(100SALES)

aland@docmagic.com

(800)649-1362

Status: Printed (Active)

Documents: 1 (4 total pages)

Signers: 3

Expires: 4/26/26, 10:21 PM (Requires: Primary)

Signatures: Y

DetailsDocumentsDocuments ReceivedEMailsVersions



Versions

#	Package Type	Version	Package ID	Created	Active
1	Initial Disclosure	1	1604298	4/23/26, 4:18 PM	Y
2	Loan Estimate Documents	1	1604299	4/23/26, 4:21 PM	Y
3	Interim Disclosure and Notice	1	1604305	4/23/26, 4:28 PM	Y

Add Internal Note

Cancel Request

Delete Request

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- If applicable, other Versions of the package can be found here, including redraws.

Recordings



SchedulerMonitoringAccountseSign RequestseSign RequestCreate RequestSearchAccount

Loan #: 777042320260001
Primary Name: John Smith
Type: EClosing
Package Id: 1604096
Worksheet #: 4284 (Version : 1)
Closing Date: 4/23/26

Lender: Alan Dai
DSI TEST LENDER (SALES)
(100SALES)
aland@docmagic.com
(800)649-1362

Status: Signed (Active)
Documents: 36 (130 total pages)
Signers: 5
Expires: N/A (Requires: Primary)
Signatures: Y

DetailsDocumentsDocuments ReceivedEMailsVersionsRecordings



Recordings

#	File	Date Recorded	
1	1604096_2026-04-23T17_21_18_716Z.mp4	April 23, 2026 • 10:21am PDT	

Add Internal Note

Cancel Request

Delete Request

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- If applicable, recording(s) of RON transaction(s) associated with the package can be found here. This tab will not be visible if there are no recordings.

Signing Complete

eSign Console - Alan Dai

SchedulerMonitoringAccountseSign RequestscCreate RequestSearchAccount

Loan #: 777050620260004
Primary Name: John Smith
Type: EClosing
Package Id: 1620431
Worksheet #: 4323 (Version : 1)
Closing Date: 5/11/26

Lender: Andrea Carlson
DSI TEST LENDER (SALES) (100SALES)
acarlson@docmagic.com
8006491362

Status: Signed (Active)
Documents: 36 (110 total pages)
Signers: 5
Expires: N/A (Requires: Primary)
Signatures: Y

DetailsDocumentsDocuments ReceivedEmailsVersionsRecordings

Participants

#	Name/Email	Role	Created	Started	Consented	Viewed	Completed	Declined	Links
1	John Smith aland@docmagic.com	Borrower	5/6/26 2:07 PM	5/6/26 2:08 PM	5/6/26 2:08 PM	5/6/26 2:08 PM	5/6/26 2:19 PM		Send Email Sign Documents 4506-C
2	Sandy Smith aland@docmagic.com	Borrower	5/6/26 2:07 PM	5/6/26 2:20 PM	5/6/26 2:17 PM	5/6/26 2:20 PM	5/6/26 2:24 PM		Send Email Sign Documents 4506-C
4	Byron Oden acarlson@docmagic.com	Settlement Agent	5/6/26 2:07 PM	5/6/26 2:10 PM	5/6/26 2:10 PM	5/6/26 2:10 PM	5/6/26 2:11 PM		Send Email Agent Portal
5	Docmagic Notary ron-test@docmagic.com	Notary	5/6/26 2:07 PM	5/6/26 2:19 PM	5/6/26 2:18 PM	5/6/26 2:19 PM	5/6/26 2:20 PM		Send Email Sign Documents
6	Docmagic Notary ron-test@docmagic.com	Notary	5/6/26 2:07 PM	5/6/26 2:24 PM	5/6/26 2:20 PM	5/6/26 2:24 PM	5/6/26 2:25 PM		Send Email Sign Documents

Action Log

Date	User	IP Address	Description
5/6/26 2:07 PM	System User		eSign event created and expires on 05/11/2026
5/6/26 2:07 PM	System User		Preview Mode enabled until 05/11/2026
5/6/26 2:07 PM	John Smith		Invitation sent to aland@docmagic.com
5/6/26 2:07 PM	Sandy Smith		Invitation sent to aland@docmagic.com
5/6/26 2:07 PM	Byron Oden		Invitation sent to acarlson@docmagic.com
5/6/26 2:07 PM	Alan Dai		Preview Mode was disabled
5/6/26 2:08 PM	John Smith		Consented to DocMagic eSign
5/6/26 2:08 PM	John Smith		eSign event started
5/6/26 2:08 PM	John Smith		Closing Documents version 1 prepared on May 06, 2026, 2:07 PM PDT displayed

- A package is considered "done" when all participants have completed their workflows. Please note that if you have an integration that supports push back, that it will not occur until the package is considered complete by this metric.
- Please note that document packages will only remain in the eSign Console for 90 Days. Please remember to download and save all signed documents and recordings before the 90 days is up.

Create Request

The screenshot shows the 'Create Request' form in the eSign Console. The top navigation bar includes links for Scheduler, Monitoring, Accounts, eSign Requests, **Create Request** (highlighted with a blue arrow), Search, and Account. The form fields are as follows:

- *From: (You)**: Includes a text field for email (aland@docmagic.com) and four text fields for name (Alan, Middle, Dai, Suffix).
- To: (Signers)**: Includes a text field for Email Address and four text fields for name (First, Middle, Last, Suffix), plus a Code field.
- *Documents:**: Includes a text field for document name, an Attach button, and a Prepare your document button.
- Subject: optional**: Includes a text field with the placeholder 'Optional'.
- Message: optional**: Includes a text area with the placeholder 'Optional'.

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

- Use the Create Request function to send a one-time custom eSign request.
- Add signer(s), upload your document(s), and click Prepare Documents to tag them for signature using the Document Editor.
- When ready, click Send to submit the request for signature. Your request will appear at the top of the [eSign Console](#).
- This feature may require the [eSign Console Admin User Privilege](#). If the privilege has been assigned and the option is still unavailable, clear your browser's cache and cookies and try again.