



Tagging Documents
With Document Editor

Tagging Documents

Getting Started in the eClose Console

Start by clicking on the pencil icon in your eClose Console to open the Document Editor in another tab.

The screenshot displays the DocMagic eClose Console interface. At the top, the header shows 'DocMagic eClose Console (Notary)' and a user profile. Below the header, there are four main sections: 'LOAN' with details like Loan #, Primary Borrower, Type, Package ID, and Worksheet #; 'LENDER' with Company, Contact, Email, and Phone; 'SETTLEMENT AGENT' with Company, Contact, Email, and Phone; and 'COUNTDOWN TO CLOSING' with a timer showing 0 days, 0 hours, 3 minutes, and 43 seconds. Below these sections are tabs for 'Details', 'eJournal', and 'Action Log', along with a 'Start eClosing' button. The 'Signers (2)' section contains a table with columns for Signer Name / Email, Role, Notary Name / Email, Notary Type / Closing Date - Time, KBA / Status, ID Verify / Status, Status, and eSign. The 'Documents (21)' section features a list of documents with columns for #, eSign Enabled, Page(s), Signer(s), and Completed. A blue arrow points from the text box to a pencil icon in the document list. The Dell logo is visible at the bottom of the monitor frame.

#	Signer Name / Email	Role	Notary Name / Email	Notary Type / Closing Date - Time	KBA / Status	ID Verify / Status	Status	eSign
1	Stephen Trullit strullit@docmagic.com	Borrower	Docmagic Notary ron-test@docmagic.com	DocMagic RON 8/11/2023 - 10:30am			● Not Started	<input type="button" value="Open Signing Room"/>
2	Andy Agent strullit@docmagic.com	Settlement Agent					● Ready to Sign	<input type="button" value="Open Signing Room"/>

#	eSign Enabled	Page(s)	Signer(s)	Completed
1	Freeze/Close Letter	1	0	✓
2	Multistate Fixed Rate Electronic Note	4	1	✓
3	Uniform Residential Loan Application	8	1	✓



Tagging Documents

Left Column / Document List

If you need to find a specific document, you may scroll through the column on the left.

Signature Affidavit and AKA Statement
Prepare documents for signing.

State of
County of

Subscribed and sworn to before me on , by JOHN SMITH

This eTag cannot be edited

Notary Seal
(Seal, if any)

Signature
Notary's Signature Date

(Notary's printed, typed or stamped name, if not in seal)

My commission expires:

Signature Affidavit and AKA Statement

1

22
89

Click the icon with three dots and three lines to switch to a list of all the documents. Thumbnails of the documents will be loaded by default in the left column.



Tagging Documents

Locked Tags

Please note that you may no longer edit tags that have been programmed by DocMagic. Tags that cannot be changed will be displayed with a lock icon.

The screenshot displays a software interface for creating a "Signature Affidavit and AKA Statement". The main workspace contains several form fields, each with a lock icon indicating it is not editable. These include "State of" and "County of" (both with dropdown menus), "Subscribed and sworn to before me on" (with a "T Textbox" tag), "RON Regulatory Language" (with a "T" tag), "Notary Seal" (with a lock icon), "Notary's Signature" (with a lock icon), "Date", "Notary Name" (with a "T" tag), and "My commission expires:" (with a "Commission E..." tag). A tooltip with the text "This eTag cannot be edited" is positioned over the "RON Regulatory Language" tag. On the right side, there are two circular notification icons: a green one with the number "22" and a blue one with the number "89". The interface also features a search bar at the top with a magnifying glass icon and a "75%" zoom level indicator. The left sidebar shows a document preview and a list of tags. The Dell logo is visible at the bottom of the screen.

If you hover your mouse over a locked tag, it will say "This eTag cannot be edited". If you see a locked tag that needs to be changed, please contact the Lender.



Tagging Documents

Participant vs Notary Tag

Click on the [green](#) circle with the *check mark* to jump to the next Participant tag. The number next to the circle tells you how many Participant tags are in this document package – 22 in this case.

The screenshot shows a software interface for tagging documents. The title is "Signature Affidavit and AKA Statement" with the subtitle "Prepare documents for signing." The interface includes a search bar with a magnifying glass icon and a "75%" zoom level. The main content area is a form with fields for "State of" and "County of", both with dropdown menus and a "Notarization/Closi..." label. Below these is a "Subscribed and sworn to before me on" field with a "T Textbox" icon and "by JOHN SMITH". A "This eTag cannot be edited" message is displayed. There is a "T RON Regulatory Language" field. At the bottom, there are fields for "Signature" and "Date" (labeled "Notary's Signature" and "Date"), "Notary Name" (with a note "(Notary's printed, typed or stamped name, if not in seal)"), and "My commission expires:" with a "Commission E..." field. A "Notary Seal" field is also present with a "(Seal, if any)" note. On the right side, there are two circular navigation buttons: a green one with a checkmark and the number "22", and a blue one with a person icon and the number "89". A purple arrow points from the text above to the green button, and another purple arrow points from the blue button to the text below.

Click on the [blue](#) circle with the *stamp* to jump to the next Notary tag. The number next to the circle tells you how many Notary tags are in this document package – 89 in this case.

Instead of manually scrolling through the documents, we recommend checking the tags by clicking on the buttons and jumping from one tag to the next.



Tagging Documents

Adding Tags (Participants)

If you need to add something that must be filled out by a borrower, you can do that in PostFill. Click the little arrow to expand the list of options.

The screenshot shows a document viewer interface. The document content includes a table with columns for 'Cushion Selected By Servicer \$' (558.32) and 'Total Disbursements \$'. Below the table is the text 'INITIAL ESCROW ACCOUNT DISCLOSURE STATEMENT' and '12 CFR 1024.17(b)(1) IEADS.MSC 03/28/16 Page 1'. At the bottom, there is a signature field for 'Borrower JOHN SMITH' and a date field. On the right side, there is a panel titled 'eTags' with a list of tags: 'Signature & Initials', 'Signature', 'Initials', 'PostFill', 'Textbox', 'Phone Number', 'Date', 'Checkbox', 'Radio', and 'Notary'. The 'PostFill' and 'Textbox' tags are highlighted with green boxes. A blue arrow points from the text box in the instruction above to the 'PostFill' tag in the list. Another blue arrow points from the 'PostFill' tag to the 'Unassigned' tag in the document's signature field.

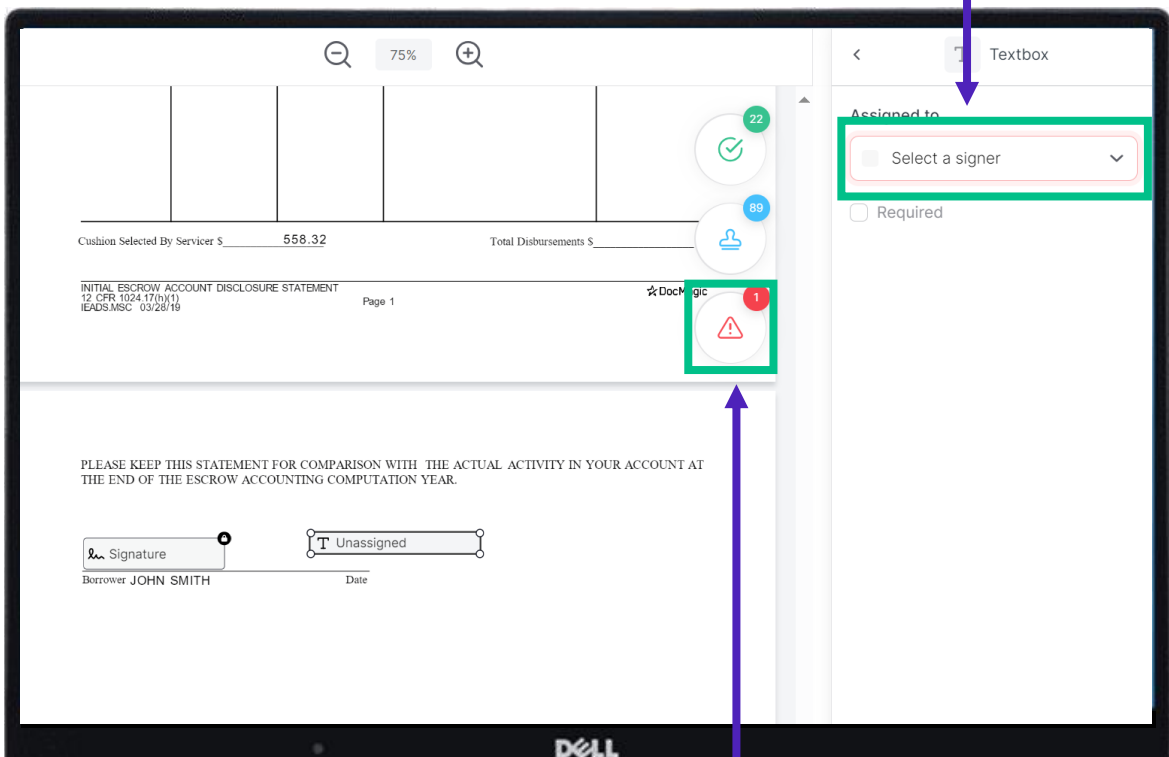
Click and drag the item you want (Textbox in this case) to your desired spot.



Tagging Documents

Adding Tags (Participants)

When you let go of the mouse, you'll be asked to Select a signer.



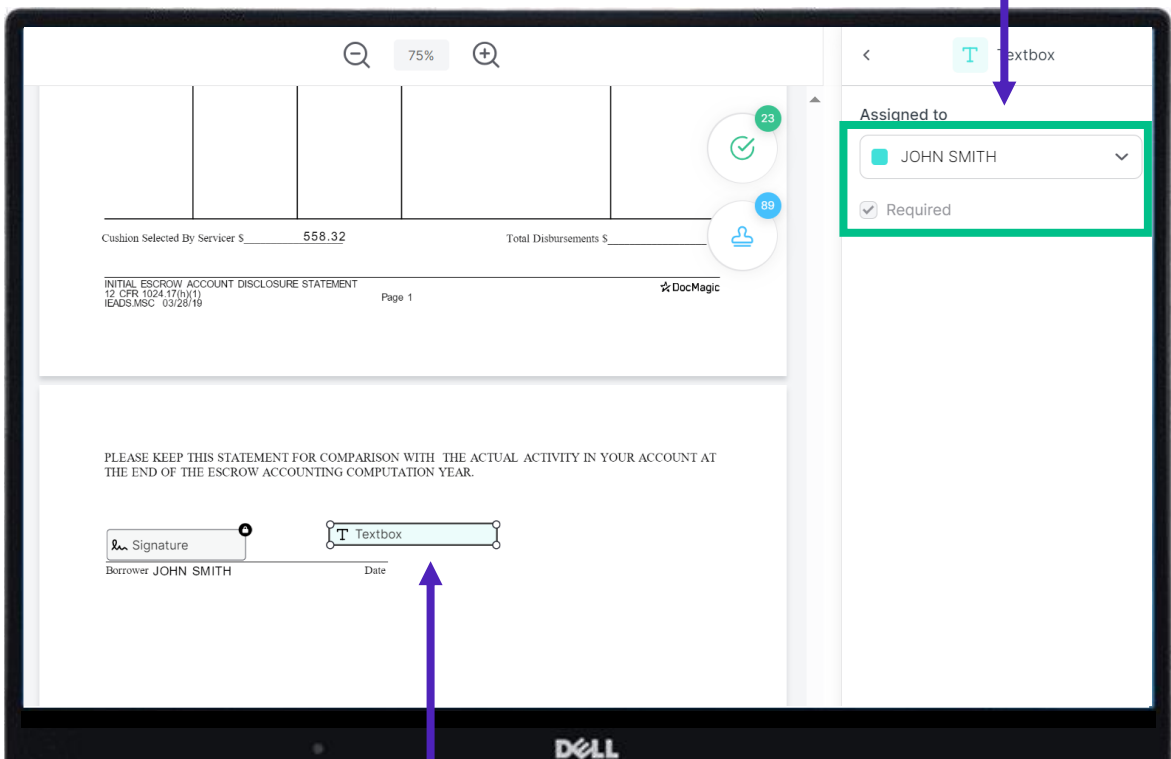
This warning triangle will appear – it is because you have an Unassigned text box.



Tagging Documents

Adding Tags (Participants)

Here's what that looks like after you select a Signer. Checking the Required box means that the signer can't proceed unless they fill it out.



You'll notice that the warning triangle is gone, and that the Textbox no longer says Unassigned.

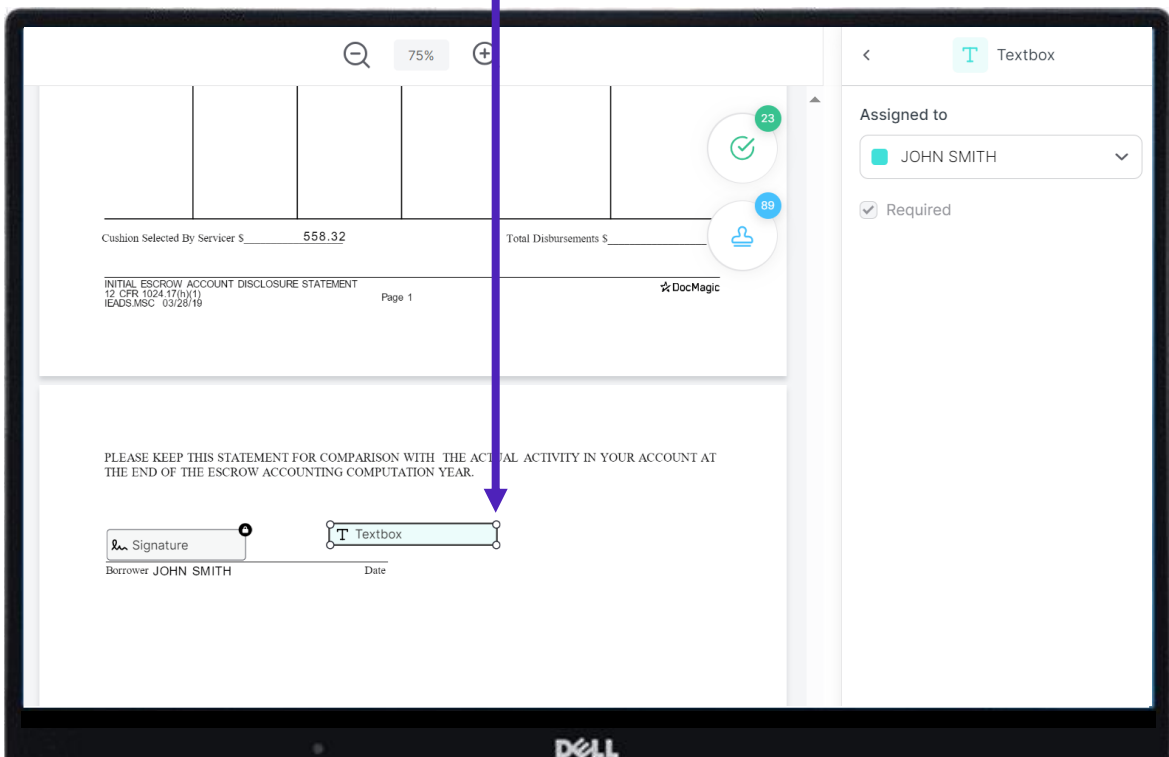
Please be careful not to assign borrower tags on notary documents and vice versa. This can cause confusion and delays during the signing experience.



Tagging Documents

Selecting and Moving a Tag

Click on an editable tag at any time to select it. You'll know that the tag is selected when you see those circles on the four corners of the tag.



You can move it around to your desired location by clicking and dragging it with the mouse. You can also change the dimensions by dragging the dots on the corners.



Tagging Documents

Deleting a Tag

To delete a tag that you added, click Delete or press backspace or delete on your keyboard.

The screenshot displays a document viewer interface. The document content includes a table with columns, a signature field labeled "Signature" with the name "Borrower JOHN SMITH", and a date field labeled "Date" with a "Textbox" tag. The right-hand sidebar shows the tag configuration for the "Textbox" tag, including "Assigned to" (JOHN SMITH) and a "Required" checkbox. A "Delete" button is highlighted with a green box, and a purple arrow points from the text box above to it.



Tagging Documents

Fill Before You Sign!

It's important to remember that during the signing experience, you can no longer edit a document after it's been signed. You can still edit if no signatures have been applied.



If you added this textbox, make sure it's filled out before any signatures are applied.

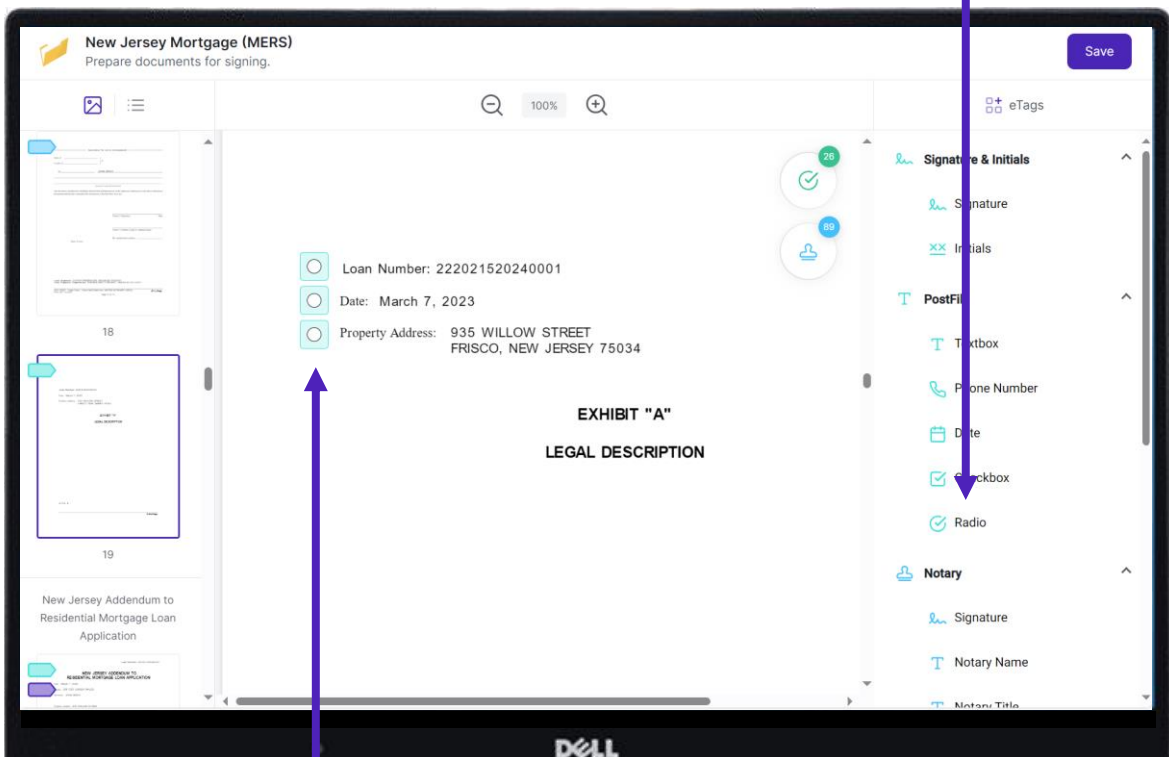
Sometimes, Settlement Agents will go in and sign ahead of time. You can usually still edit tags when that happens.



Tagging Documents

Radio Buttons

If you need a participant to pick one option from several – like they're answering a multiple-choice test question – choose Radio from Postfill.



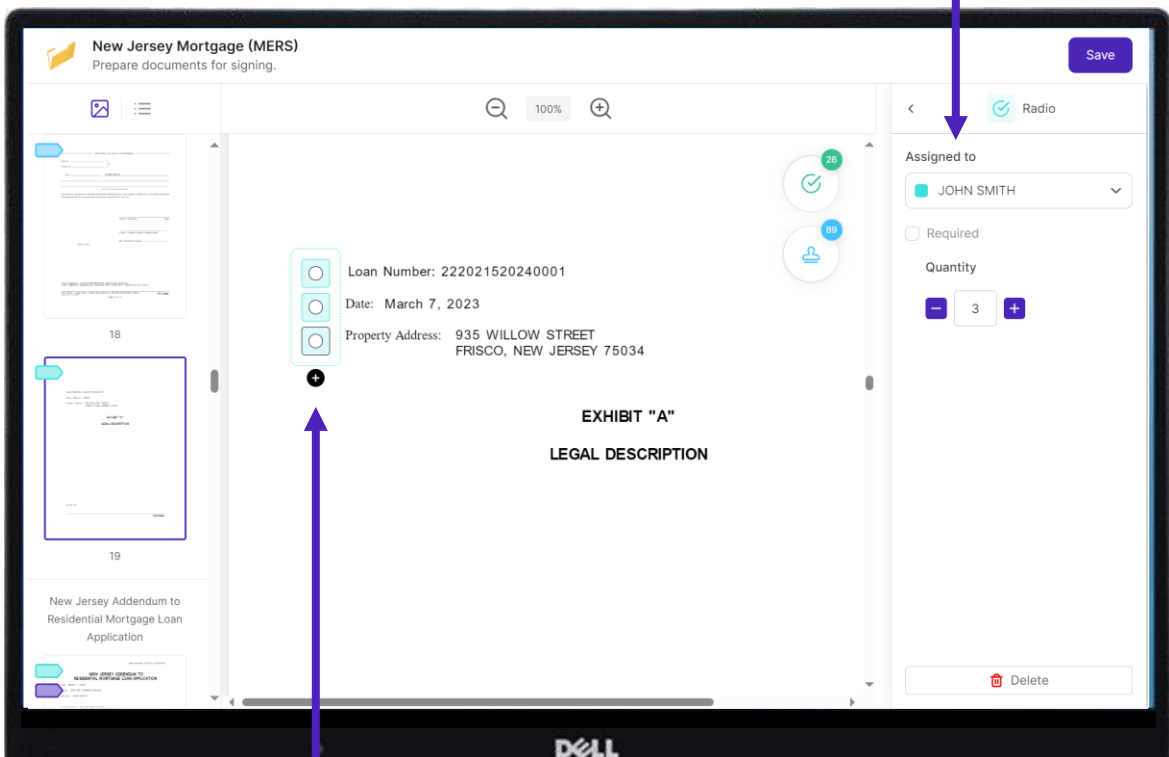
Drag and drop to your desired location, like any other tag.



Tagging Documents

Radio Buttons

On the right column, you can assign the radio buttons to a participant, toggle whether it's required, and change the quantity of options.



You also add additional options by clicking here.



Tagging Documents

Notary Tags

If you need to add something for the Notary, make sure to grab it from the Notary section.

The screenshot displays the 'New Jersey Mortgage (MERS)' software interface. The main window shows a document with several fields for notary information, including 'State of', 'County of', 'On' (with a 'Textbox' containing 'JOHN SMITH'), and 'Notary Seal'. A right-hand sidebar is open, showing a 'Notary' section with a list of tags. A blue arrow points from the text box above to the 'Notary' section in the sidebar.

Notary Tags:

- Signature
- Notary Name
- Notary Title
- Commission Number
- Commission Expiration
- Notary Seal
- Notarization/Closing County
- Notarization/Closing State
- Notarization Date
- Personally Appeared
- Signing Date
- RON Regulatory Language



Tagging Documents

Notary Tags

If you choose a tag from the Notary section, it will be required, and you won't be able to assign it to anyone else.

New Jersey Mortgage (MERS)
Prepare documents for signing.

Save

Commission Expiration

Assigned to

Notary

Required

Delete

[Space Below This Line For Acknowledgment]

State of [Notarization/Closi...]

County of [Notarization/Closi...]

On [Textbox] JOHN SMITH

(agent(s) of signor(s)/witness(es))

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

[RON Regulatory Language]

Commission E...

Signature

Notary's Signature Date

Notary Name

Notary's printed, typed or stamped name

My commission expires: [Commission ...]

Notary Seal

(Seal, if any)

Similarly, if you grab a non-Notary tag, you won't be able to assign it to a Notary.



Tagging Documents

Save & Done

When you're satisfied with the tags, click Save, then Done. You must wait for the text to change and then click Done!

The screenshot displays the 'New Jersey Mortgage (MERS)' interface for preparing documents for signing. The main area shows a document with various fields and tags. A 'Notary' sidebar on the right lists tags such as 'Signature', 'Notary Name', 'Notary Title', 'Commission Number', 'Commission Expiration', 'Notary Seal', 'Notarization/Closing County', 'Notarization/Closing State', 'Notarization Date', 'Personally Appeared', 'Signing Date', and 'RON Regulatory Language'. A 'Save' button is located in the top right corner, and a 'Done' button is positioned over the 'Notary' sidebar. A purple arrow points from the text box above to the 'Save' button.

You will be then be brought back to your Notary Portal.

