

Sending Additional Documents

The Start inHere Digital Opening Package (DOP) can include additional documents that require the Buyer or Seller signatures.

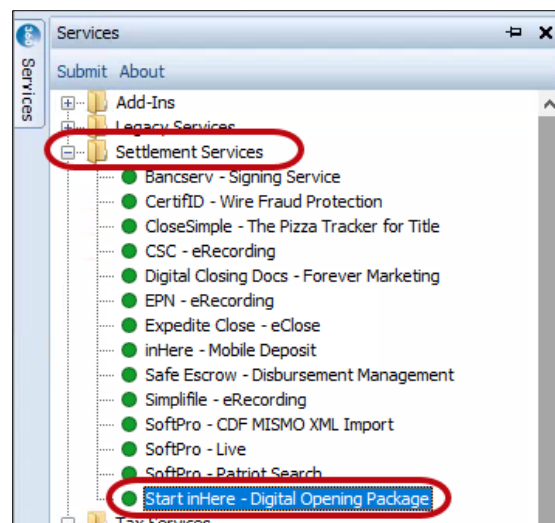
IMPORTANT: Only documents not requiring notarization should be sent.

Follow these steps to create and distribute a DOP with additional documents.

1. From the **360** ribbon, click the **Services** button

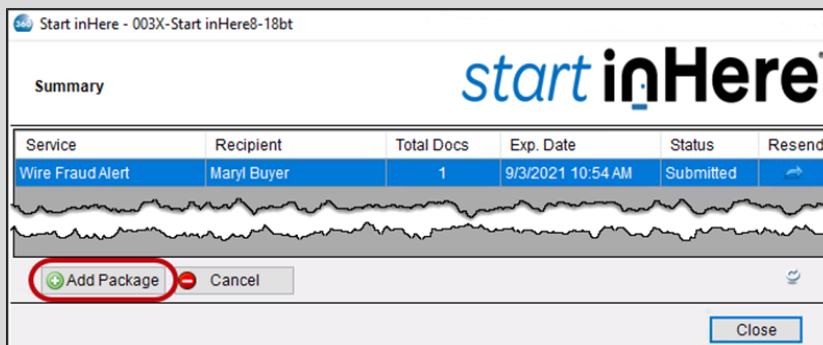


2. Expand the **Settlement Services** folder
3. Double-click the **Start inHere – Digital Opening Package** entry



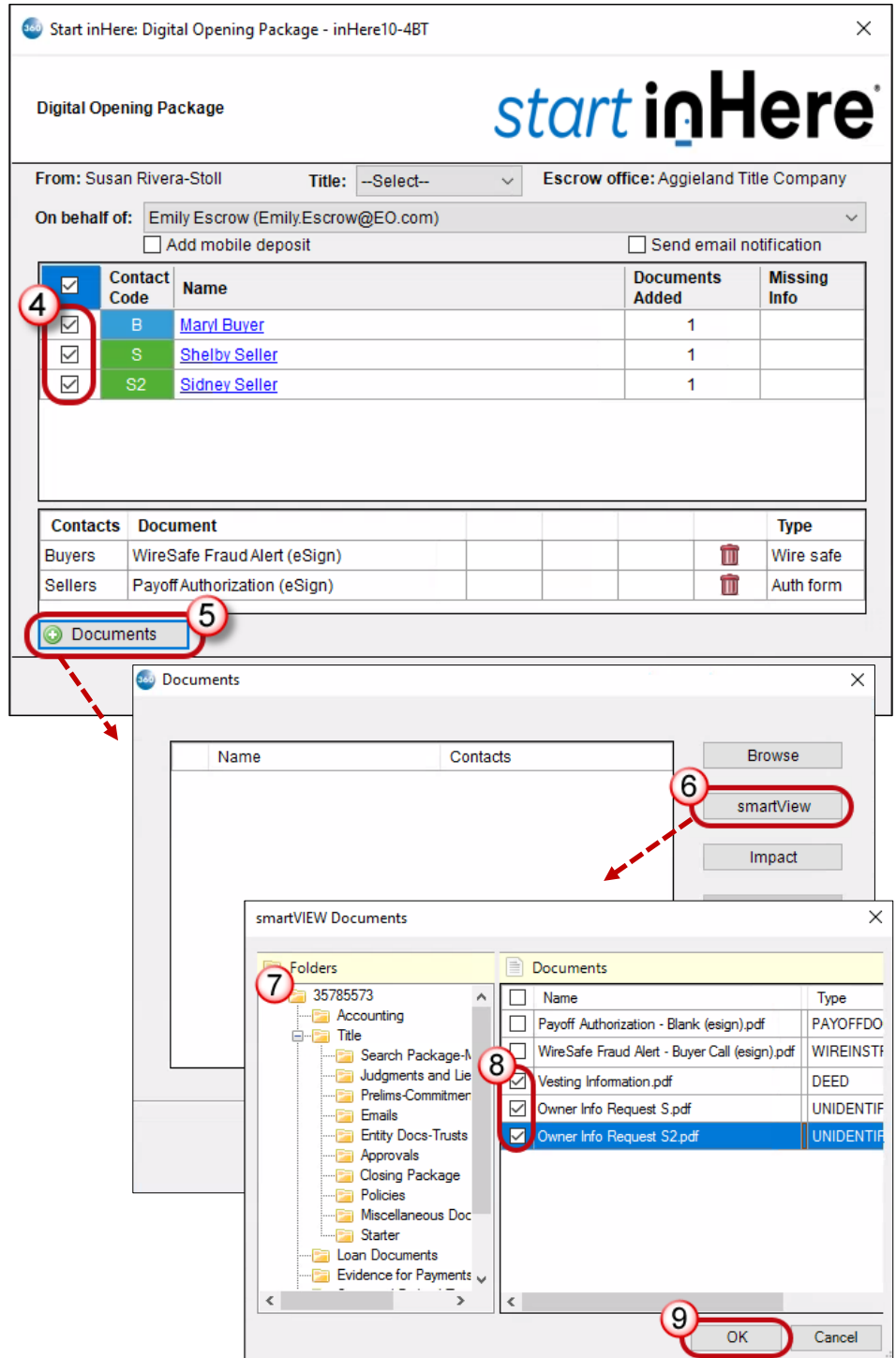
NOTE: If a package was previously created, the **Summary** window opens instead. To create a new package,

- a. Click the **Add package** button
- b. Continue on with next steps



From the **Digital Opening Package** window,

4. Check the corresponding check box for each Contact
5. Click the **Documents** button
6. Click the **smartView** button
7. Select the folder containing the documents you wish to send
8. Check the check box for each document to be sent
9. Click **OK**



Digital Opening Package

From: Susan Rivera-Stoll Title: --Select-- Escrow office: Aggeland Title Company

On behalf of: Emily Escrow (Emily.Escrow@EO.com)

☐ Add mobile deposit ☐ Send email notification

Contact Code	Name	Documents Added	Missing Info
<input checked="" type="checkbox"/> B	Marv Buyer	1	
<input checked="" type="checkbox"/> S	Shelby Seller	1	
<input checked="" type="checkbox"/> S2	Sidney Seller	1	

Contacts	Document	Type
Buyers	WireSafe Fraud Alert (eSign)	Wire safe
Sellers	Payoff Authorization (eSign)	Auth form

Documents

smartVIEW Documents

7 Folders

- 35785573
 - Accounting
 - Title
 - Search Package-M
 - Judgments and Lie
 - Prelims-Commitmer
 - Emails
 - Entity Docs-Trusts
 - Approvals
 - Closing Package
 - Policies
 - Miscellaneous Doc
 - Starter
 - Loan Documents
 - Evidence for Payments

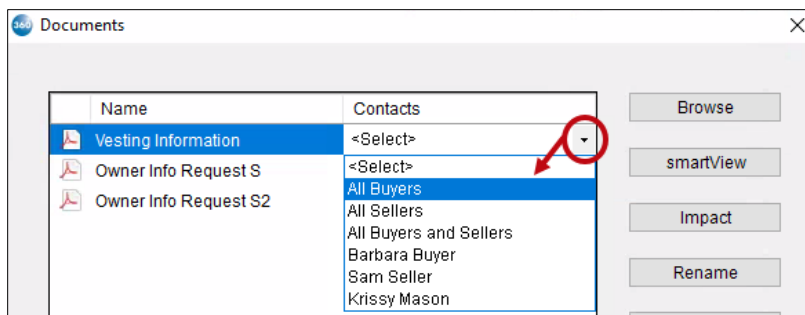
8 Documents

Name	Type
<input type="checkbox"/> Payoff Authorization - Blank (esign).pdf	PAYOFFDO
<input type="checkbox"/> WireSafe Fraud Alert - Buyer Call (esign).pdf	WIREINSTI
<input checked="" type="checkbox"/> Vesting Information.pdf	DEED
<input checked="" type="checkbox"/> Owner Info Request S.pdf	UNIDENTIF
<input checked="" type="checkbox"/> Owner Info Request S2.pdf	UNIDENTIF

9 OK Cancel

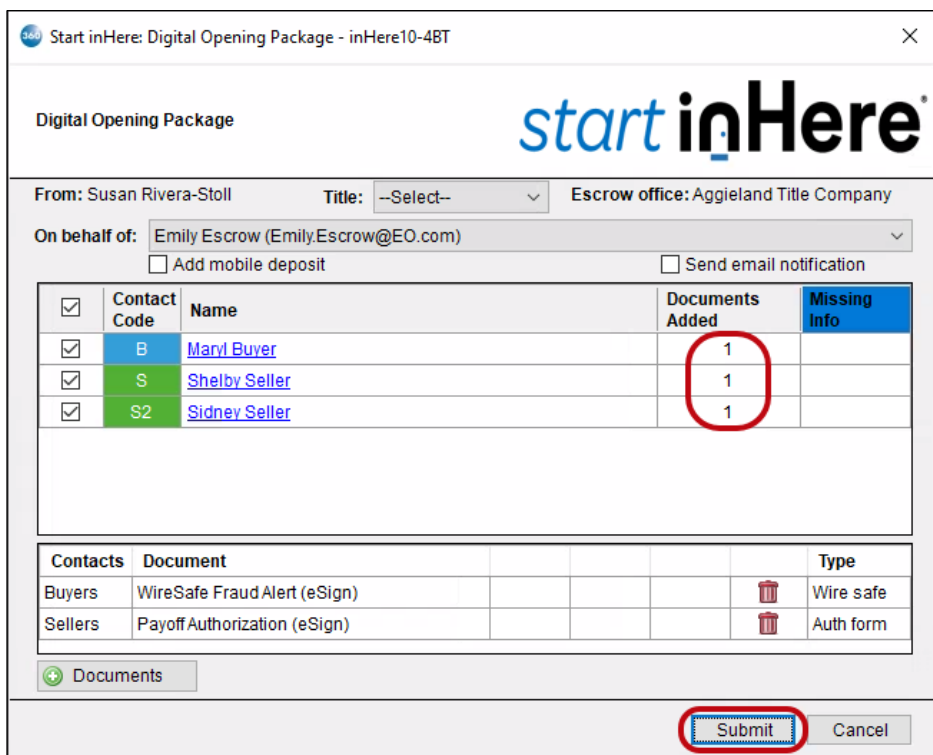
Sending Additional Documents

10. From the **Contacts** drop-down, select who is to sign the document
11. Repeat **step 10** for each document shown
12. Click the **OK** button when all Contacts have been selected



The **Digital Opening Package** window shows the number of documents added and to be sent to each Contact selected.

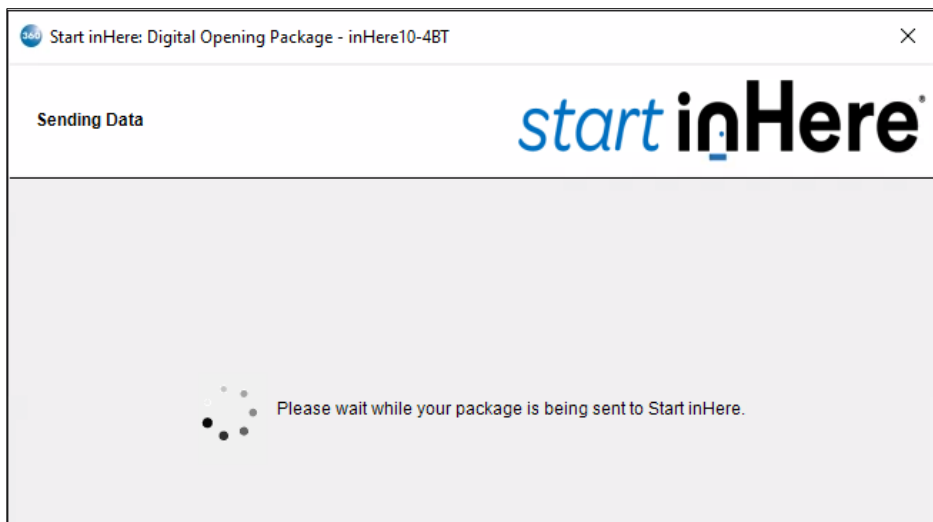
13. Click **Submit**



✓	Contact Code	Name	Documents Added	Missing Info
✓	B	Maryl Buyer	1	
✓	S	Shelby Seller	1	
✓	S2	Sidney Seller	1	

Contacts	Document	Type
Buyers	WireSafe Fraud Alert (eSign)	Wire safe
Sellers	Payoff Authorization (eSign)	Auth form

The package is submitted to Start inHere.

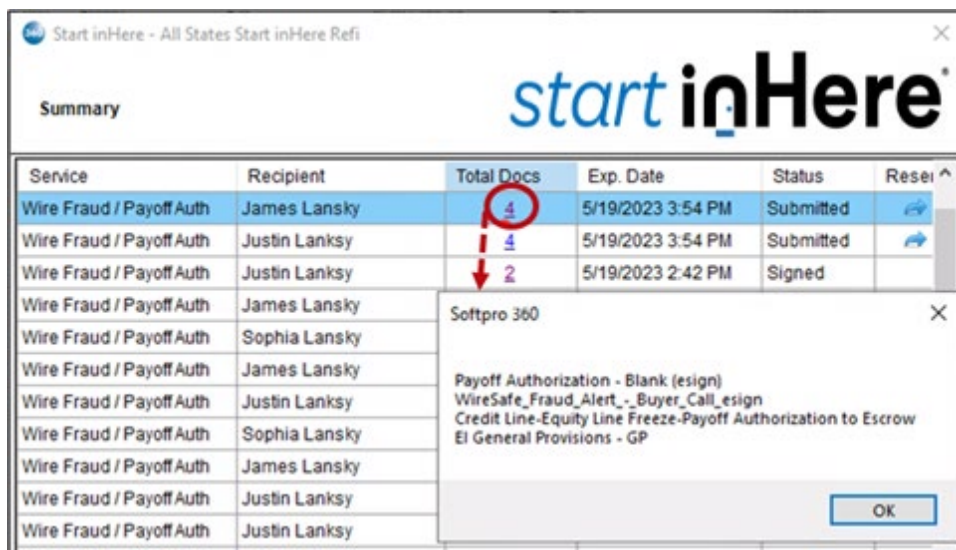


Sending Additional Documents

Once the package is submitted, the list of documents included in the package can be viewed. From the **Summary** window,

1. Locate the package you wish to view
2. Click the corresponding number link in the **Total Docs** column

A list of documents is displayed.



The screenshot shows the 'Summary' window in the Start inHere application. It contains a table with the following data:

Service	Recipient	Total Docs	Exp. Date	Status	Reser ^
Wire Fraud / Payoff Auth	James Lansky	4	5/19/2023 3:54 PM	Submitted	
Wire Fraud / Payoff Auth	Justin Lanksy	4	5/19/2023 3:54 PM	Submitted	
Wire Fraud / Payoff Auth	Justin Lanksy	2	5/19/2023 2:42 PM	Signed	
Wire Fraud / Payoff Auth	James Lansky				
Wire Fraud / Payoff Auth	Sophia Lansky				
Wire Fraud / Payoff Auth	James Lansky				
Wire Fraud / Payoff Auth	Justin Lanksy				
Wire Fraud / Payoff Auth	Sophia Lansky				
Wire Fraud / Payoff Auth	James Lansky				
Wire Fraud / Payoff Auth	Justin Lanksy				
Wire Fraud / Payoff Auth	Justin Lanksy				

A modal window titled 'Softpro 360' is open, displaying the following text:

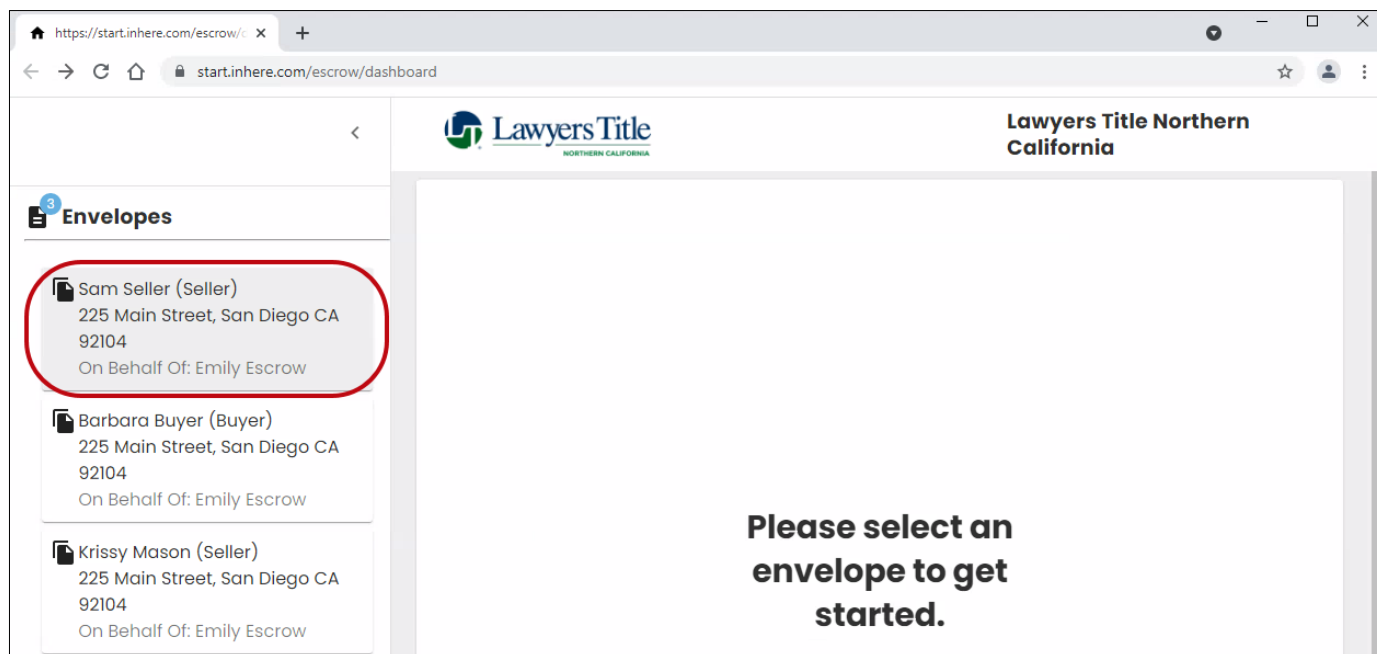
Payoff Authorization - Blank (esign)
 WireSafe_Fraud_Alert_-_Buyer_Call_esign
 Credit Line-Equity Line Freeze-Payoff Authorization to Escrow
 El General Provisions - GP

An 'OK' button is visible at the bottom right of the modal.

Tagging the Document or Applying a Template

Once the **Start inHere** window opens, you can then tag each document or apply a signing template.

1. Select the first **Envelope**



The screenshot shows the 'Start inHere' dashboard. On the left, there is a sidebar with a section titled 'Envelopes' containing three items:

- Sam Seller (Seller)
225 Main Street, San Diego CA 92104
On Behalf Of: Emily Escrow
- Barbara Buyer (Buyer)
225 Main Street, San Diego CA 92104
On Behalf Of: Emily Escrow
- Krissy Mason (Seller)
225 Main Street, San Diego CA 92104
On Behalf Of: Emily Escrow

The first envelope, 'Sam Seller (Seller)', is highlighted with a red oval. On the right side of the dashboard, there is a large text prompt: 'Please select an envelope to get started.'

2. Apply a template or skip to tag the document

Sending Additional Documents

If a template exists, it appears in the **Templates** pane to the right of the document. If none exists, click the **Skip This Step** link to continue to manually add a tag.

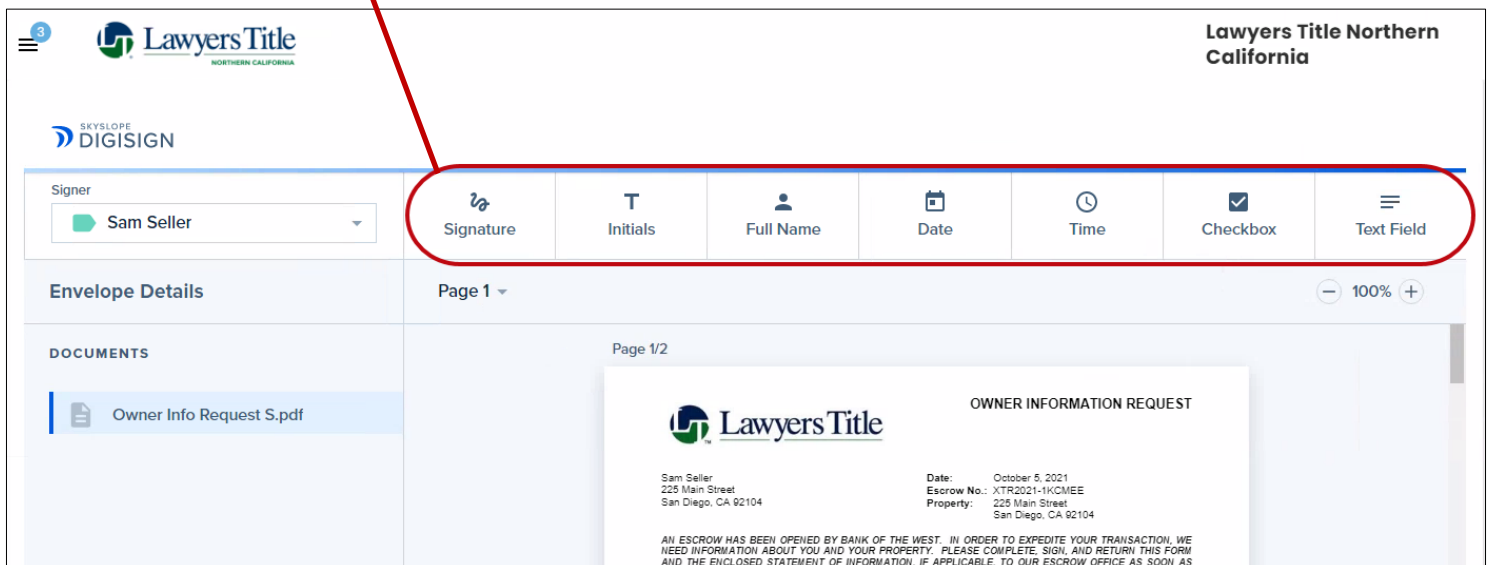


The screenshot shows the SOFTPRO 360 interface. On the left, under 'YOUR UPLOADED DOCUMENTS', is 'Owner Info Request S.pdf'. The main area displays the document content, which includes the 'Lawyers Title' logo and an 'OWNER INFORMATION REQUEST' form. The form contains fields for 'Date', 'Escrow No.', and 'Property', along with a section for 'AN ESCROW HAS BEEN OPENED BY BANK OF THE WEST'. On the right, the 'TEMPLATES' pane is empty, showing a search bar and the message 'No templates have been created yet'. At the bottom right, the 'Skip This Step' link is highlighted with a red circle, and a 'Next' button is also visible.

Manually Adding Tags

1. Click the **Skip This Step** if no template(s) exist

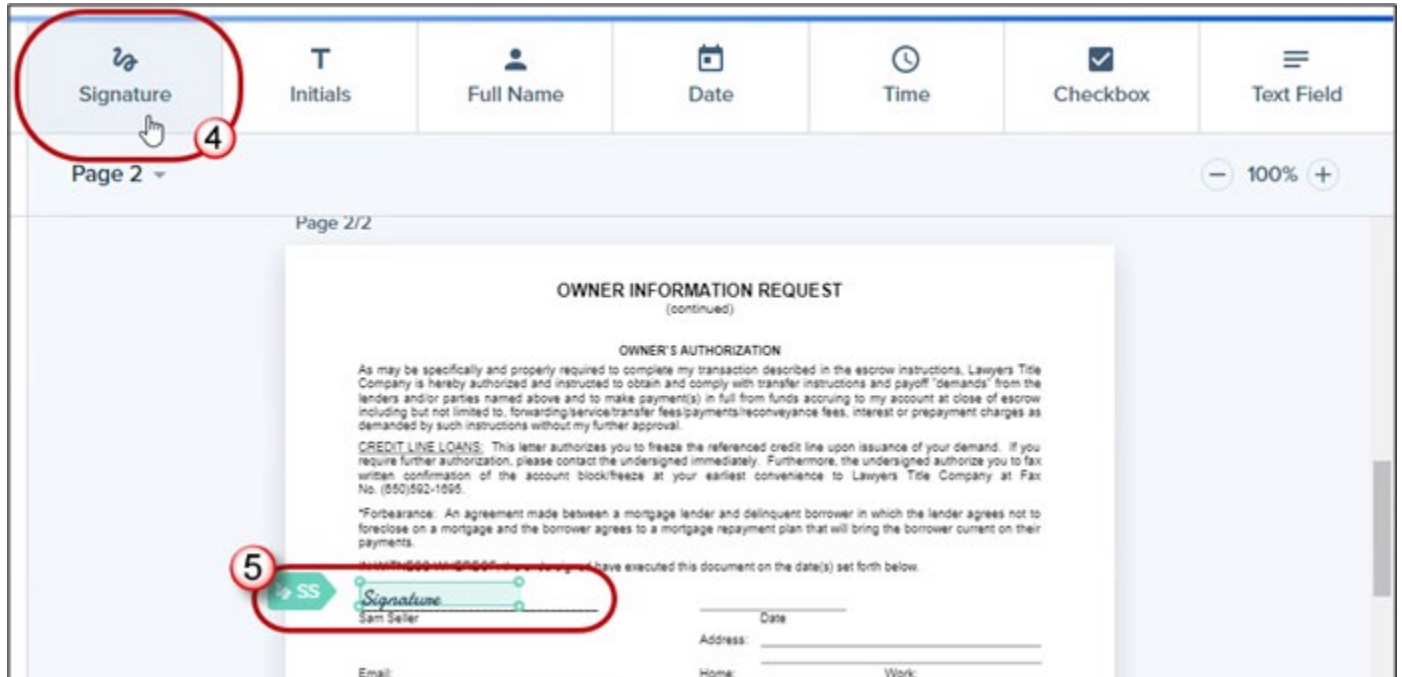
The toolbar shows tags available to add information to your document.




The screenshot shows the SOFTPRO 360 interface. At the top, the 'Lawyers Title Northern California' logo is visible. Below it, the 'SKYSLOPE DIGISIGN' logo is shown. The 'Signer' dropdown menu is set to 'Sam Seller'. The 'Envelope Details' section shows 'Page 1'. The 'DOCUMENTS' section lists 'Owner Info Request S.pdf'. The main area displays the document content, which includes the 'Lawyers Title' logo and an 'OWNER INFORMATION REQUEST' form. The toolbar is highlighted with a red circle, showing tags for Signature, Initials, Full Name, Date, Time, Checkbox, and Text Field. A red arrow points from the 'Skip This Step' link in the previous screenshot to the toolbar.

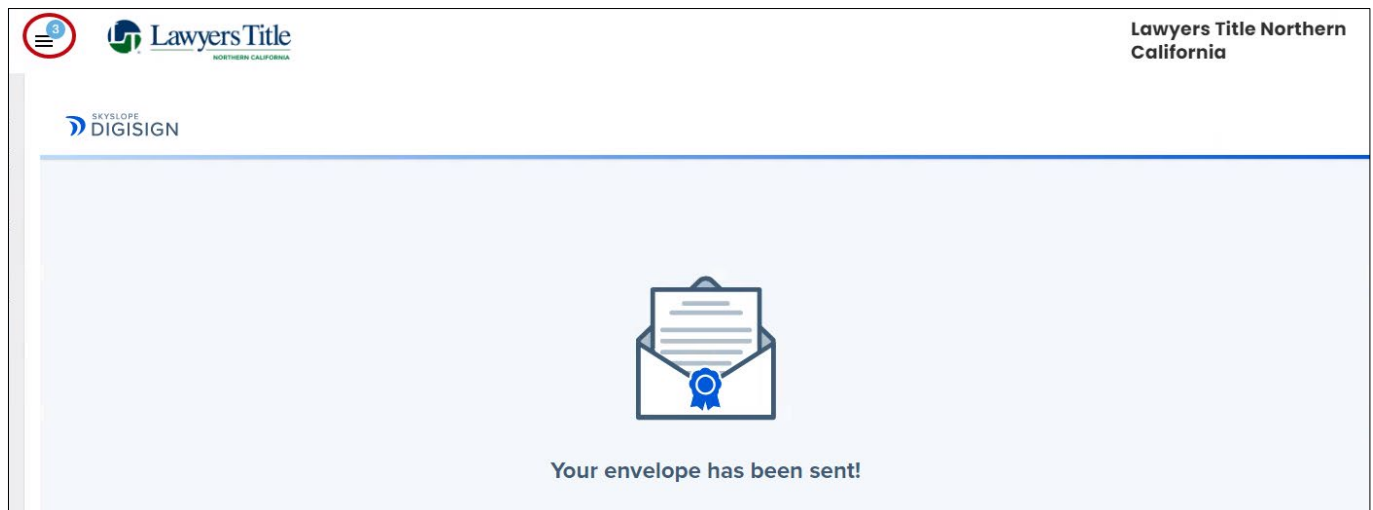
2. Click the tag on the toolbar you wish to use
3. Scroll to the location you wish to add the tag

- Click in the document to insert the tag



NOTE: The tag can be resized or moved by dragging a corner to resize or hover over the tag and holding the left mouse key, move it to its new location.

- Once the appropriate tag(s) are added, click the **Send** button
- Click the **Show Envelopes**  icon to return to the **Envelopes** list

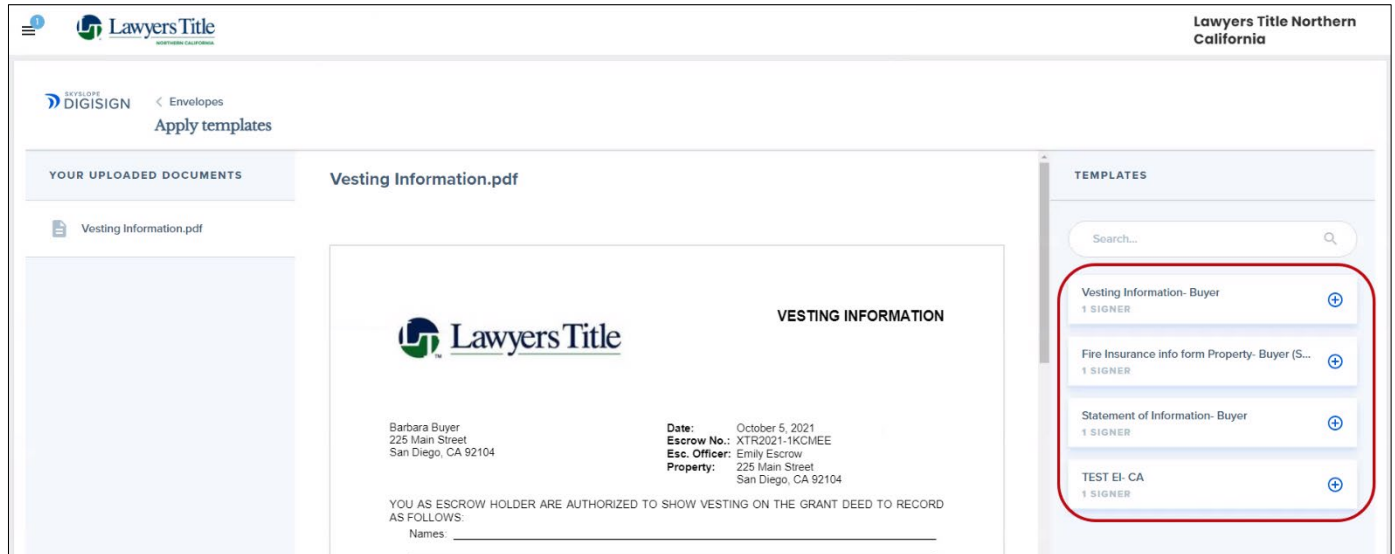


- Select the next **Envelope**
- Repeat **steps 2-7** for each document

Applying a Template

From the **Templates** pane,

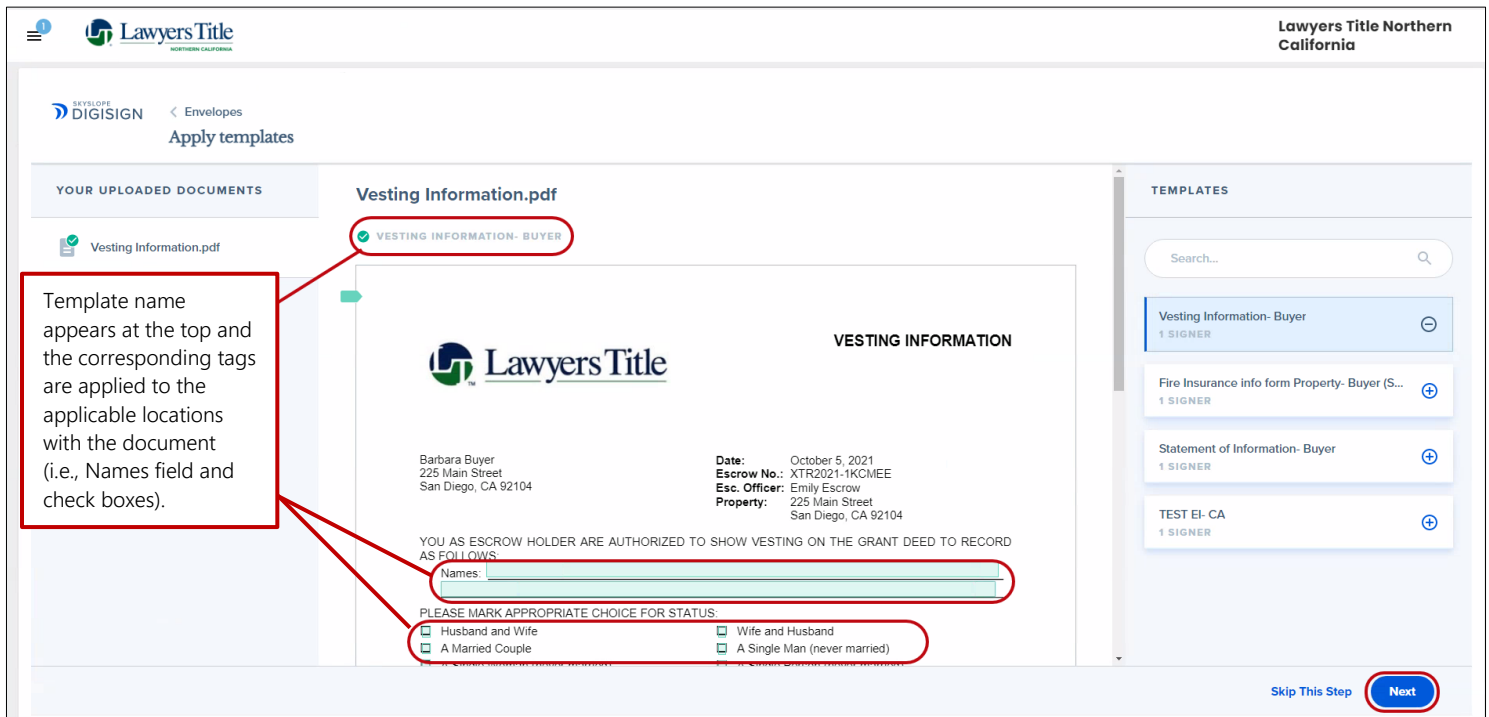
1. Select the Template you wish to apply



2. Click the **Next** button

The tags are added to the appropriate locations.

3. Click the **Next** button



Template name appears at the top and the corresponding tags are applied to the applicable locations with the document (i.e., Names field and check boxes).

4. Click the **Send** button