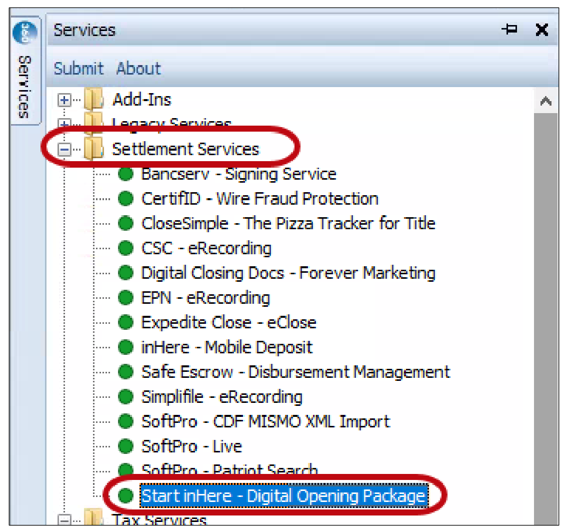
The Start inHere Digital Opening Package (DOP) can include additional documents that require the Buyer or Seller signatures.

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

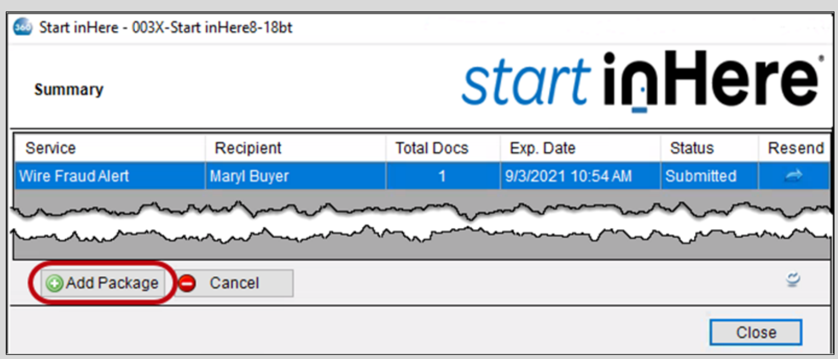
2. Expand the **Settlement Services** folder
3. Double-click the **Start inHere – Digital Opening Package** entry



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

a. Click the **Add package** button

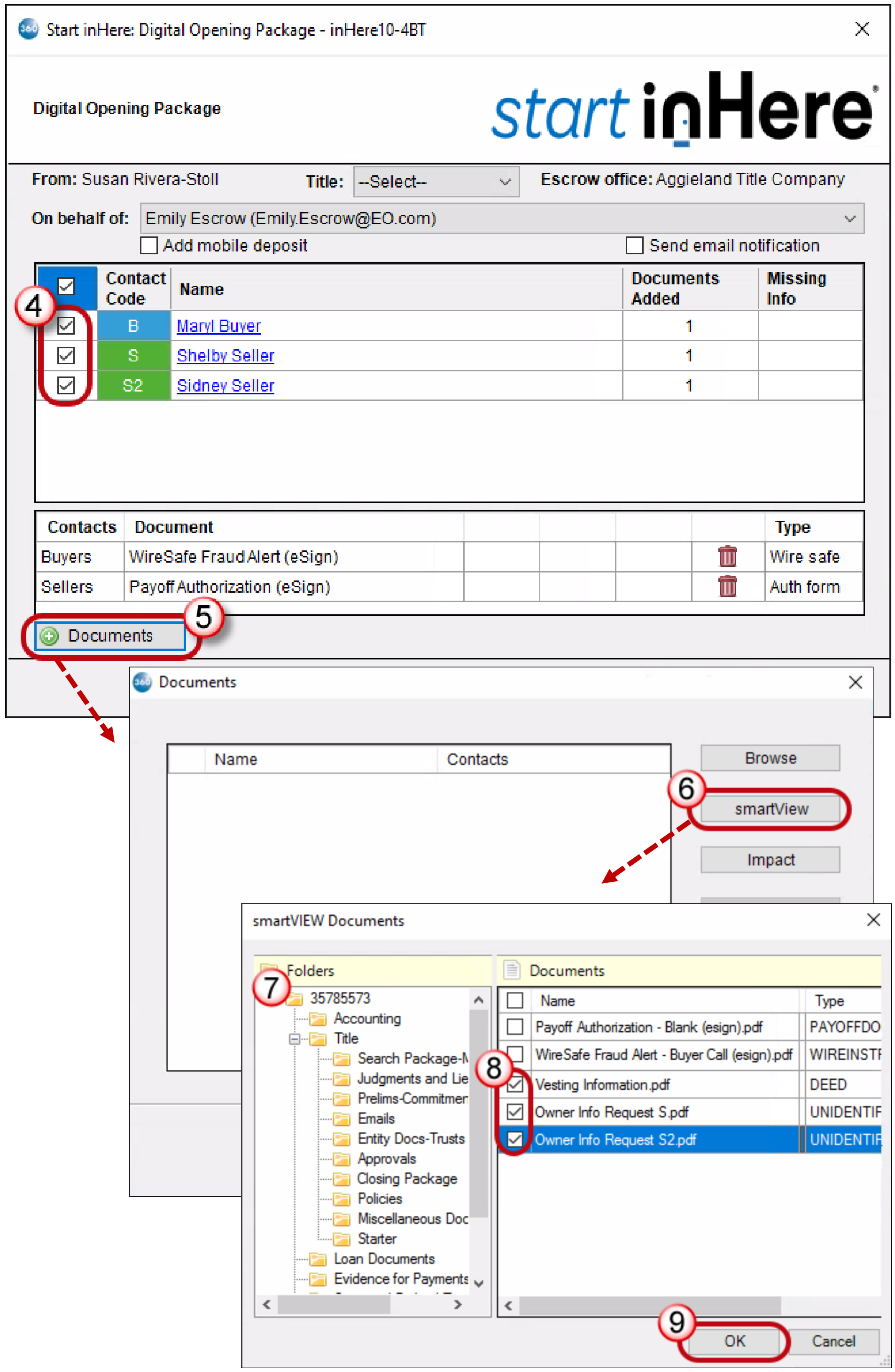
b. Continue on with next steps



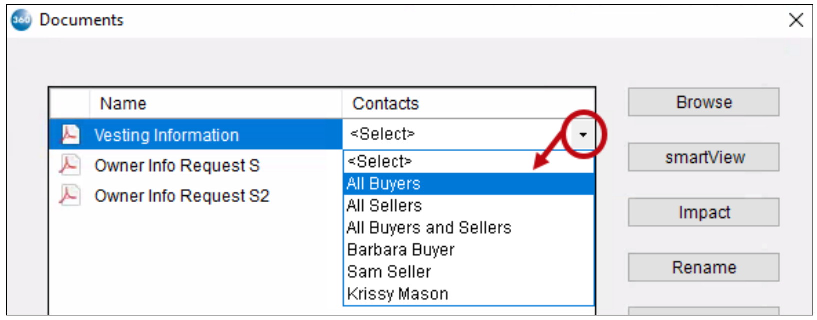
Sending Additional Documents

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**

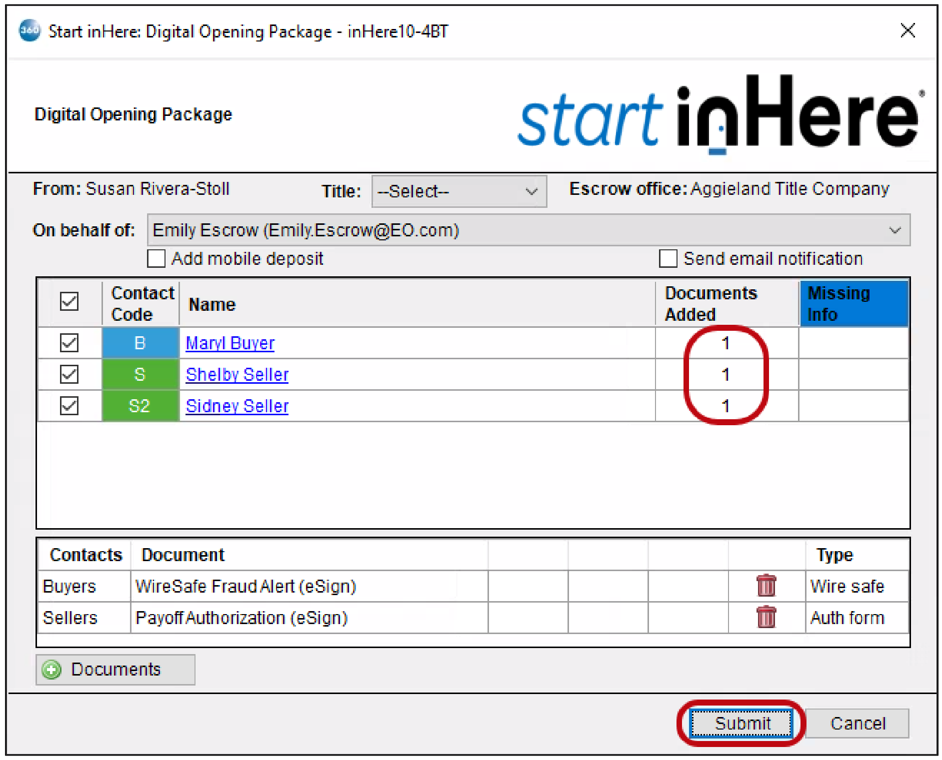


10. From the **Contacts** drop-down, select who is to sign the document
11. Repeat **step 10** for each document shown
12. Click the **OK** button when all Contacts have been selected

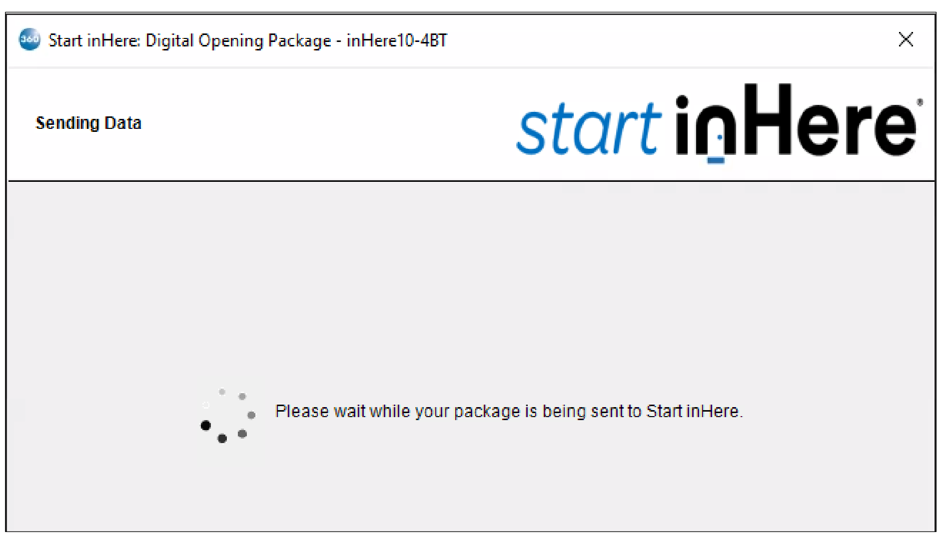


The **Digital Opening Package** window shows the number of documents added and to be sent to each Contact selected.

13. Click **Submit**



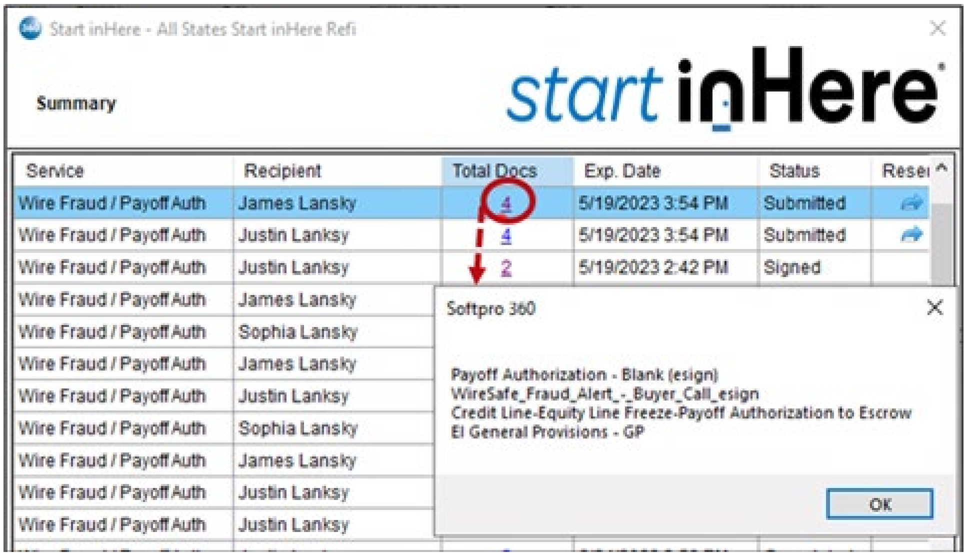
The package is submitted to Start inHere.



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

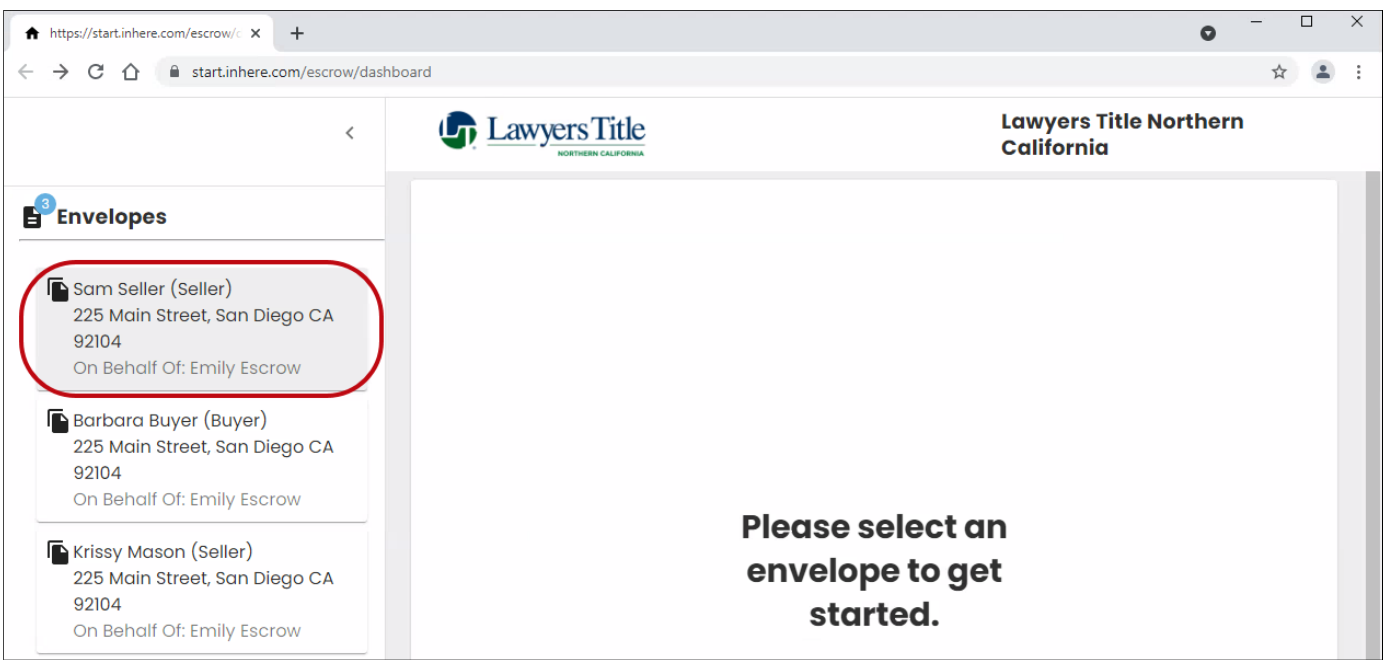
A list of documents is displayed.



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**



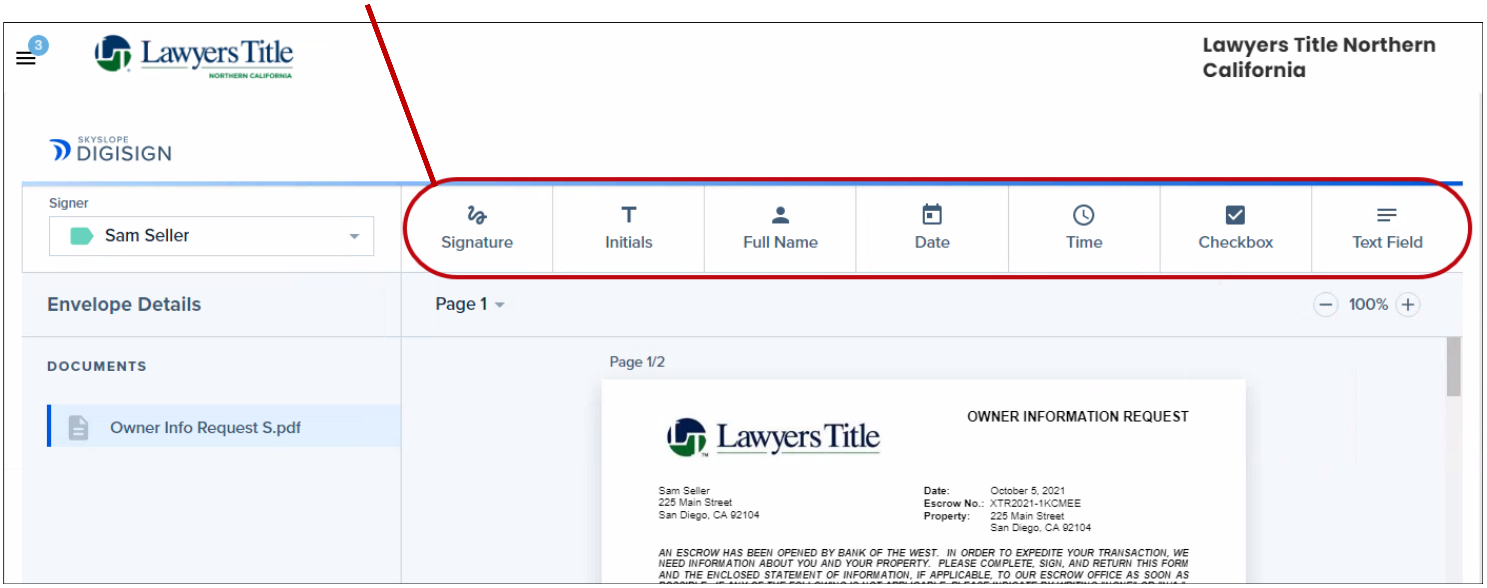
2. Apply a template or skip to tag the document

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.

Manually Adding Tags

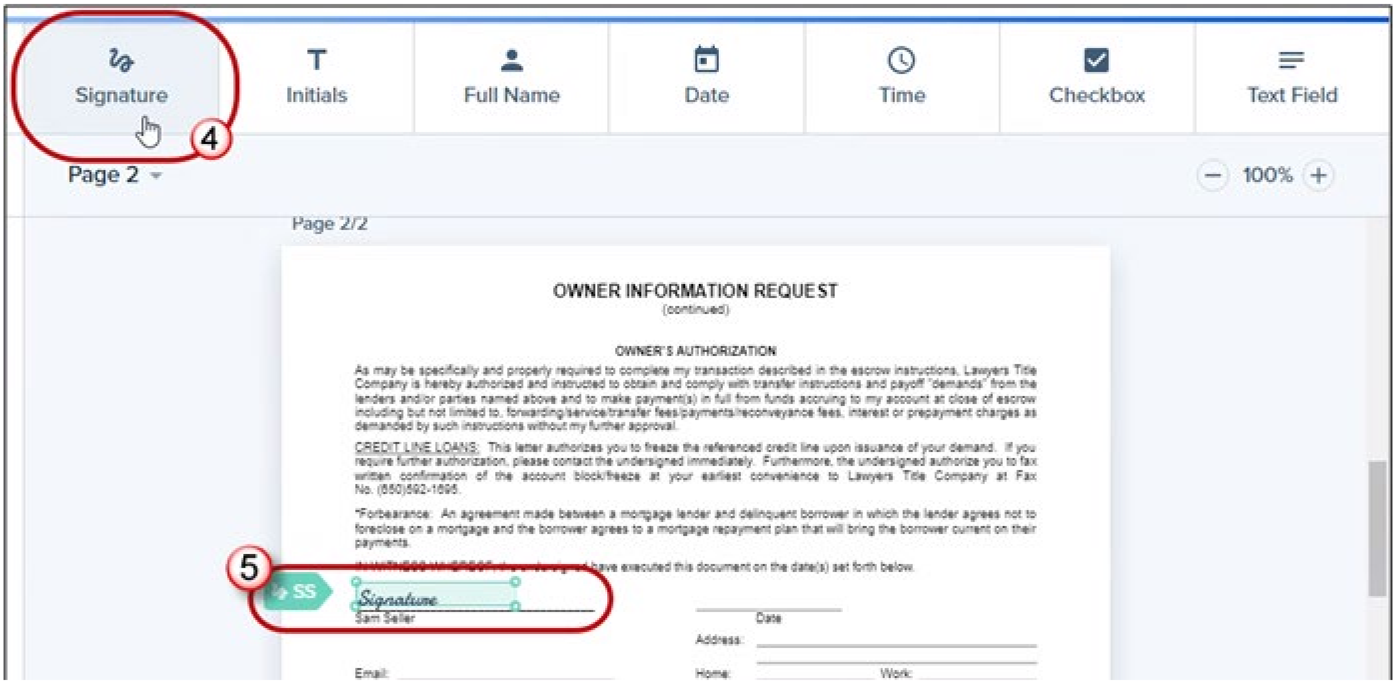
1. Click the **Skip This Step** if no template(s) exist

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



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

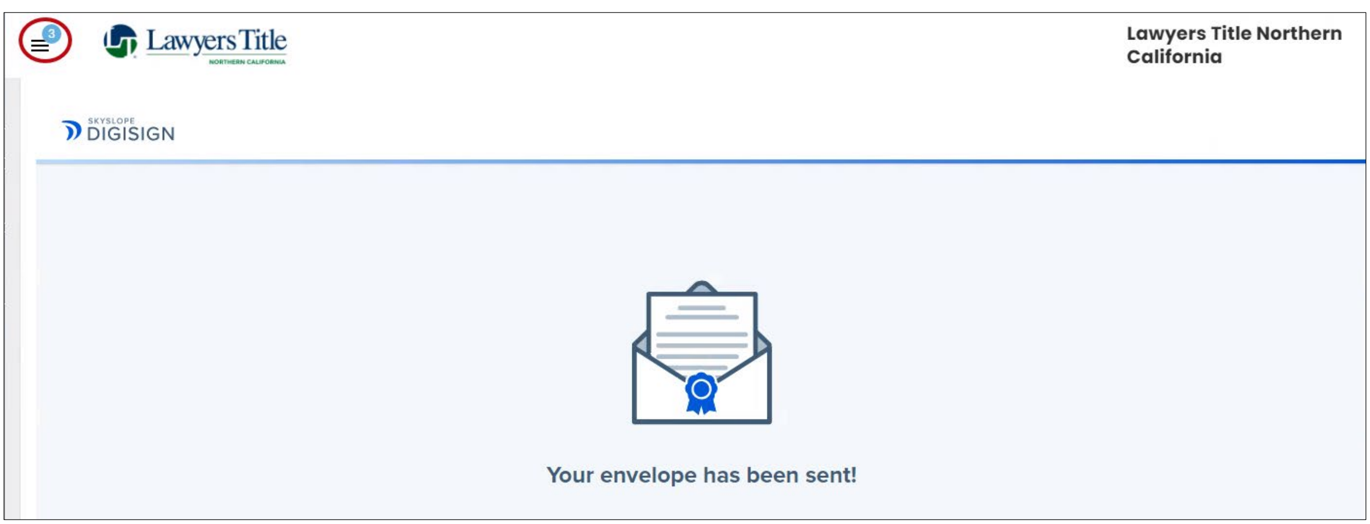
4. Click in the document to insert the tag



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.

5. Once the appropriate tag(s) are added, click the **Send** button

6. Click the **Show Envelopes** icon to return to the **Envelopes** list



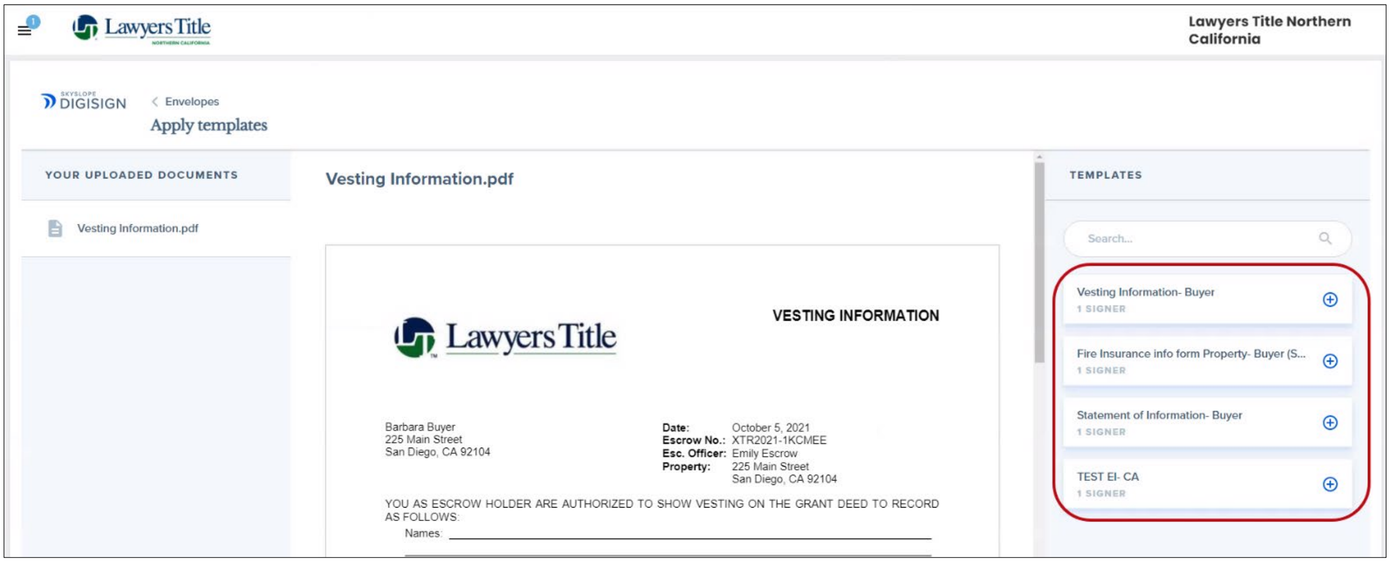
7. Select the next **Envelope**

8. Repeat **steps 2-7** for each document

Applying a Template

From the **Templates** pane,

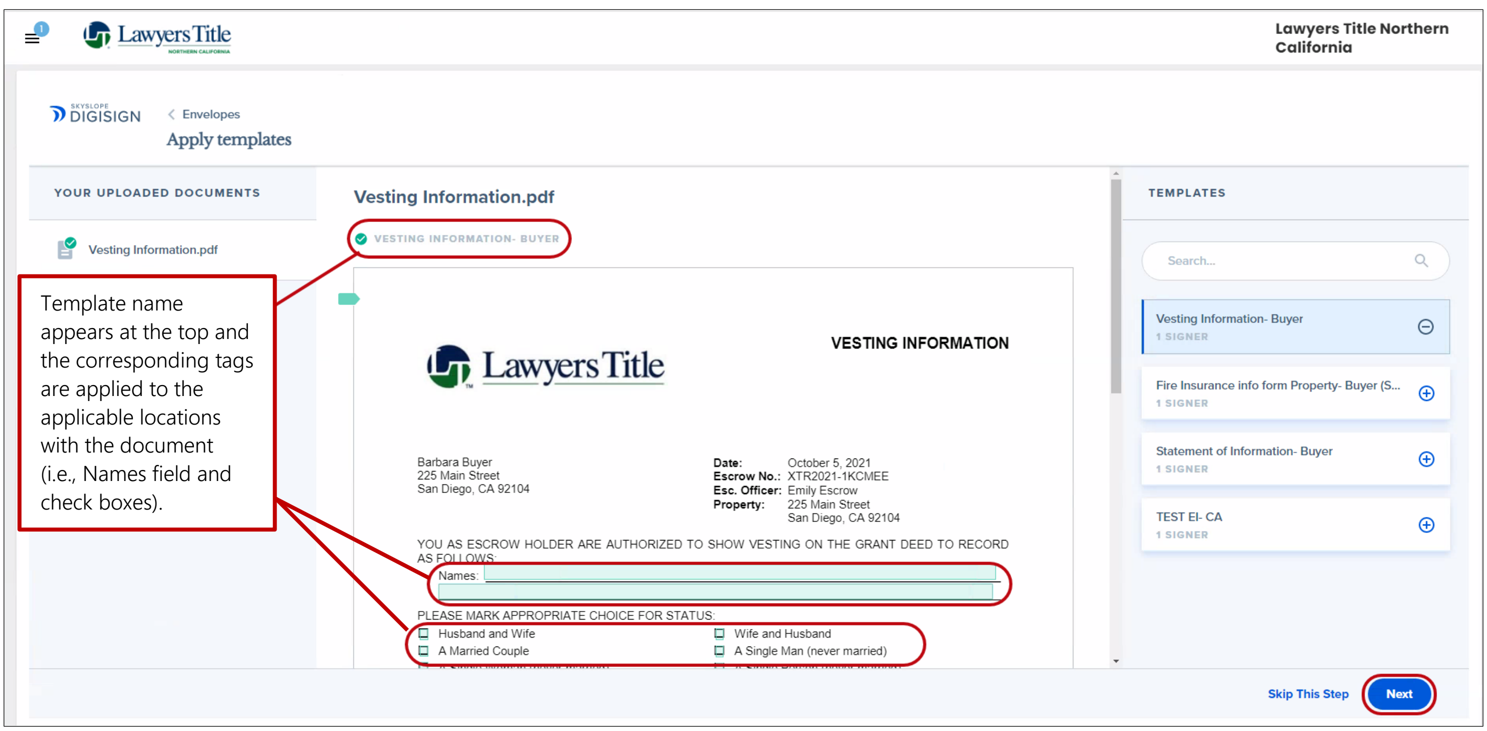
1. Select the Template you wish to apply



2. Click the **Next** button

The tags are added to the appropriate locations.

3. Click the **Next** button



4. Click the **Send** button