

## Sending Additional Documents

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

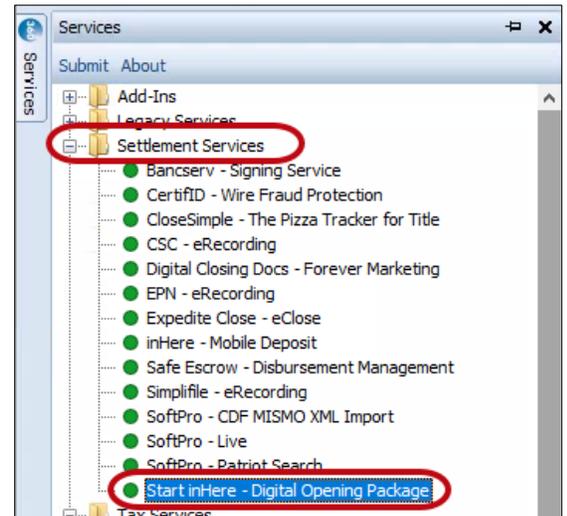
**IMPORTANT:** Only documents not requiring notarization should be sent.

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

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

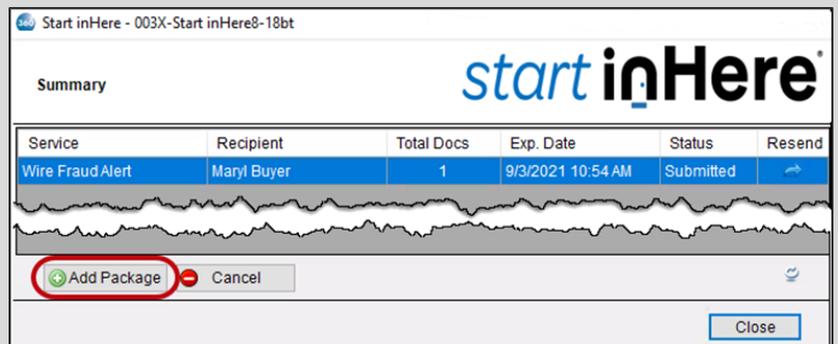


2. Expand the **Settlement Services** folder
3. Double-click the **Start inHere – Digital Opening Package** entry



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



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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**

The screenshot shows the 'Start inHere: Digital Opening Package - inHere10-48T' window. At the top, it displays 'Digital Opening Package' and the 'start inHere' logo. Below this, it shows the sender information: 'From: Susan Rivera-Stoll', 'Title: --Select--', and 'Escrow office: Aggieldand Title Company'. The 'On behalf of:' field is set to 'Emily Escrow (Emily.Escrow@EO.com)'. There are checkboxes for 'Add mobile deposit' and 'Send email notification'.

Step 4: A table lists contacts with checkboxes in the first column. The contacts are:

<input checked="" type="checkbox"/>	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	

Step 5: A 'Documents' button is highlighted with a red circle and a dashed arrow pointing to the 'Documents' window.

Step 6: In the 'Documents' window, the 'smartView' button is highlighted with a red circle and a dashed arrow pointing to the 'smartVIEW Documents' window.

Step 7: In the 'smartVIEW Documents' window, the 'Folders' pane on the left shows a tree view with '35785573' selected. The 'Documents' pane on the right shows a list of documents:

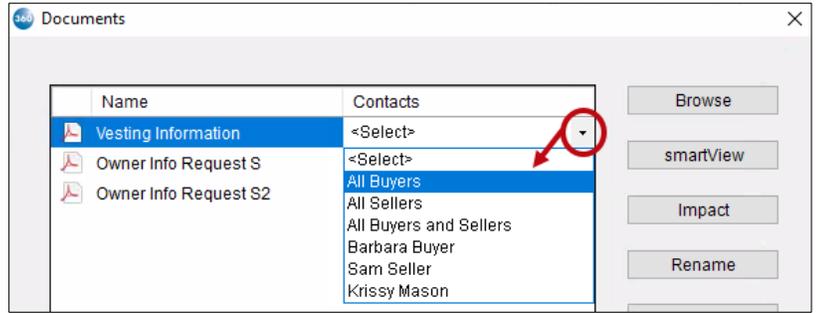
<input checked="" type="checkbox"/>	Name	Type
<input type="checkbox"/>	Payoff Authorization - Blank (esign).pdf	PAYOFFDO
<input type="checkbox"/>	WireSafe Fraud Alert - Buyer Call (esign).pdf	WIREINSTI
<input checked="" type="checkbox"/>	Vesting Information.pdf	DEED
<input checked="" type="checkbox"/>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

Step 8: The checkboxes for 'Vesting Information.pdf', 'Owner Info Request S.pdf', and 'Owner Info Request S2.pdf' are highlighted with a red circle and a dashed arrow pointing to the 'OK' button.

Step 9: The 'OK' button is highlighted with a red circle and a dashed arrow pointing to the 'OK' button.

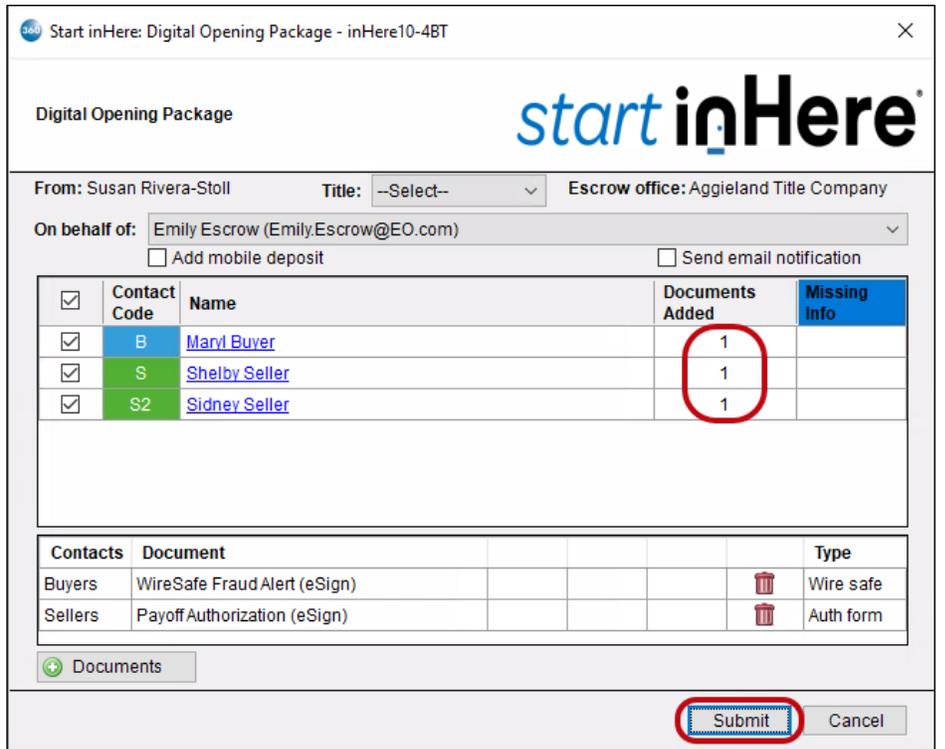
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- From the **Contacts** drop-down, select who is to sign the document
- Repeat **step 10** for each document shown
- Click the **OK** button when all Contacts have been selected

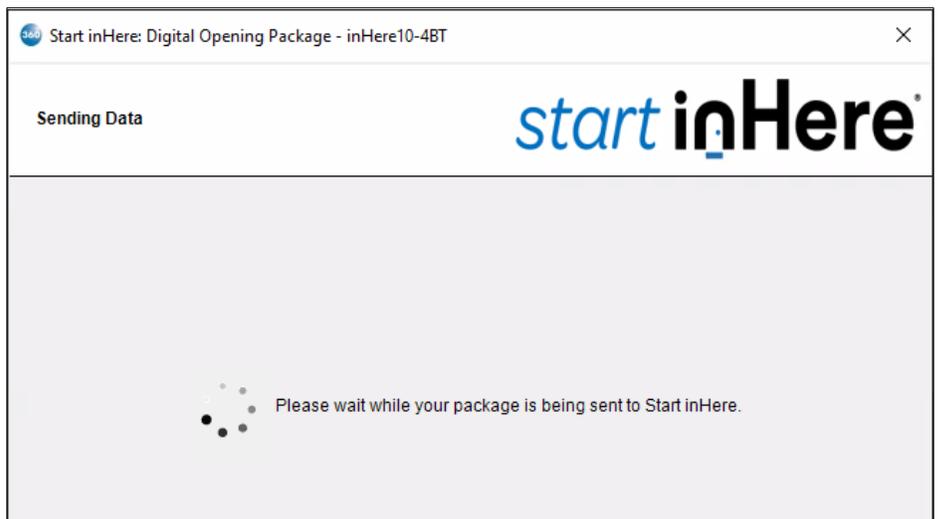


The **Digital Opening Package** window shows the number of documents added and to be sent to each Contact selected.

- Click **Submit**



The package is submitted to Start inHere.



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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 Lansky	4	5/19/2023 3:54 PM	Submitted	
Wire Fraud / Payoff Auth	Justin Lansky	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 Lansky				
Wire Fraud / Payoff Auth	Sophia Lansky				
Wire Fraud / Payoff Auth	James Lansky				
Wire Fraud / Payoff Auth	Justin Lansky				
Wire Fraud / Payoff Auth	Justin Lansky				

A modal window titled 'Softpro 360' is open, displaying a list of documents:

- Payoff Authorization - Blank (esign)
- WireSafe\_Fraud\_Alert\_-\_Buyer\_Call\_esign
- Credit Line-Equity Line Freeze-Payoff Authorization to Escrow
- EI General Provisions - GP

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

### 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 'Envelopes' dashboard in the Start inHere application. The dashboard header includes the 'Lawyers Title Northern California' logo and name. On the left, there is a list of envelopes:

- 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. In the center of the dashboard, a large message reads: 'Please select an envelope to get started.'

2. Apply a template or skip to tag the document

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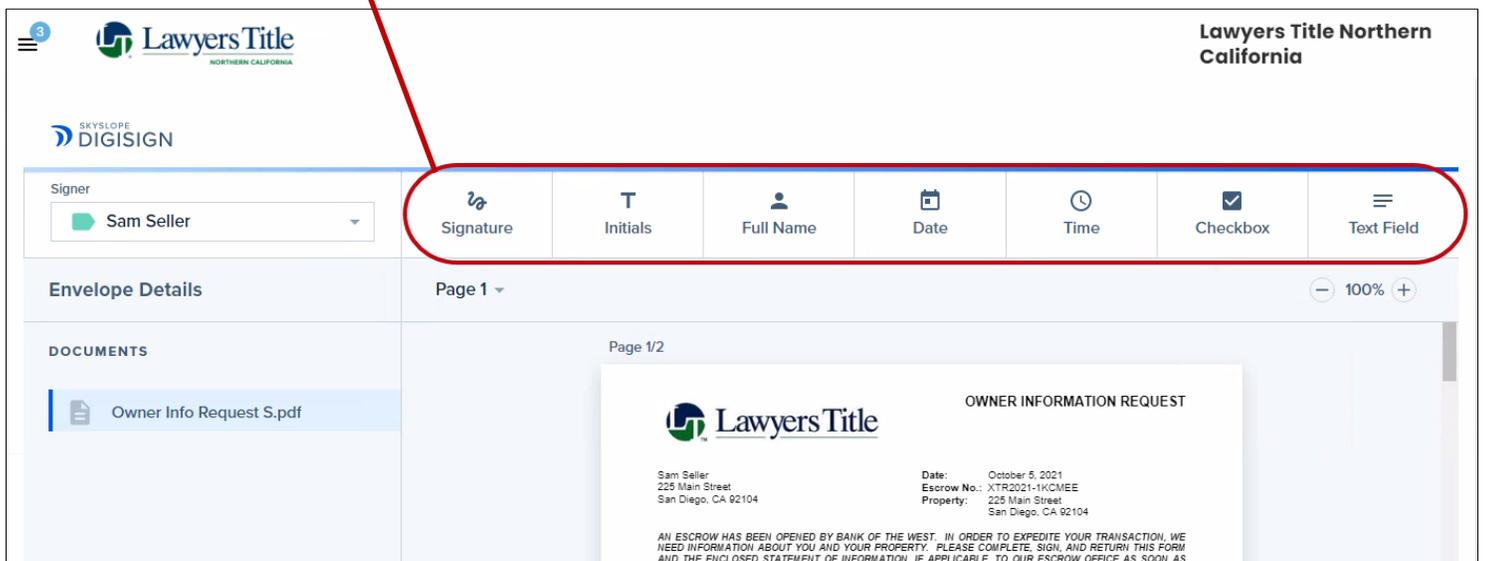
If a template exists, it appears in the **Templates** pane to the right of the document. If none exists, click the **Skip This Step** link to continue to manually add a tag.



### Manually Adding Tags

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

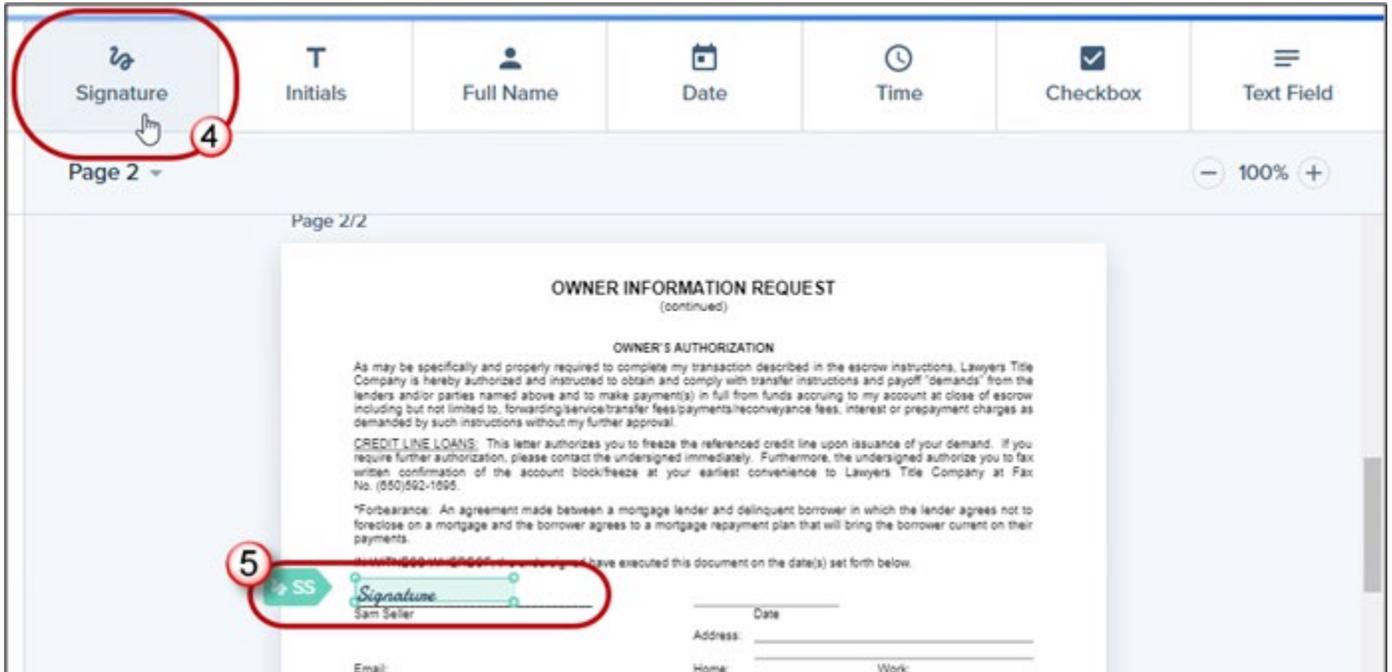
The toolbar shows tags available to add information to your document.



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

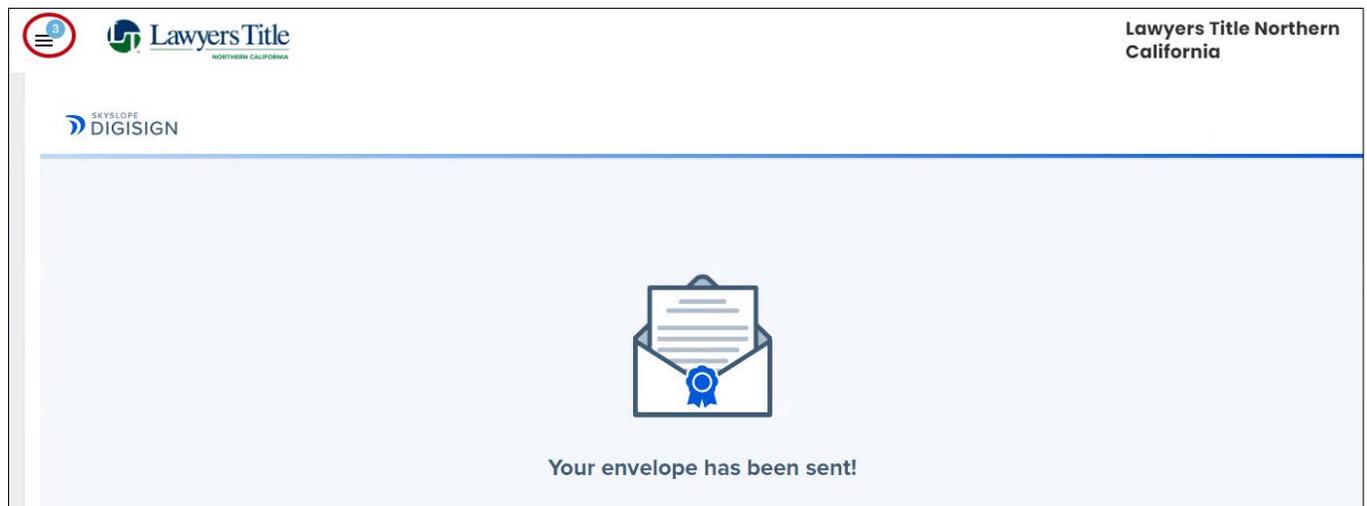
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- Click in the document to insert the tag



**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



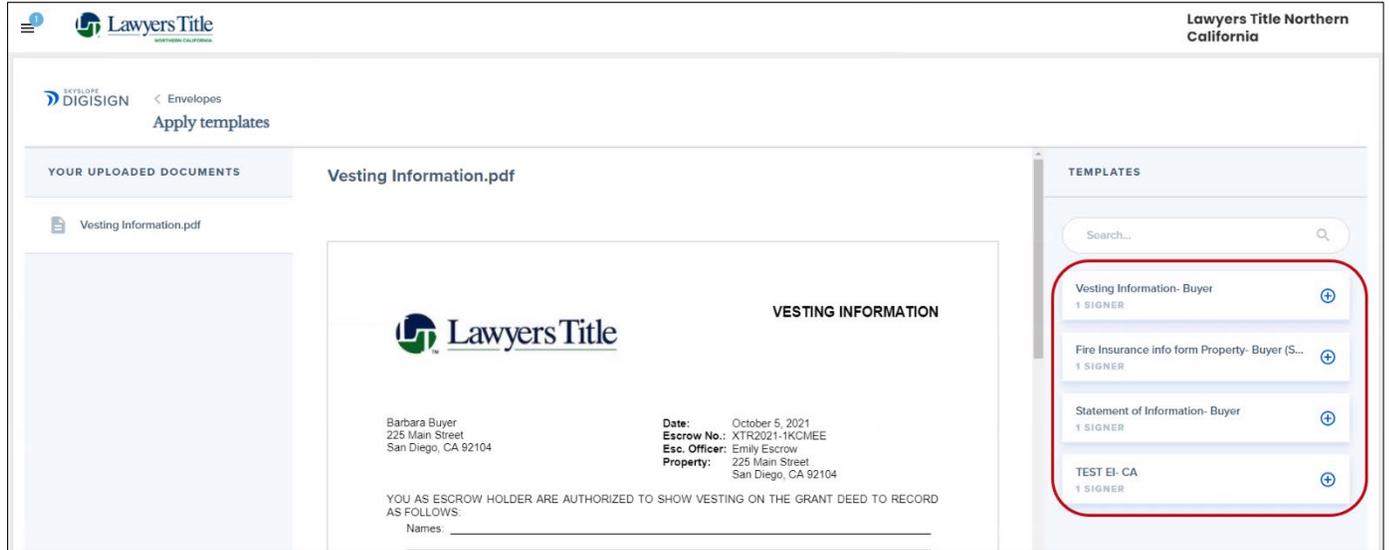
- Select the next **Envelope**
- Repeat **steps 2-7** for each document

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### Applying a Template

From the **Templates** pane,

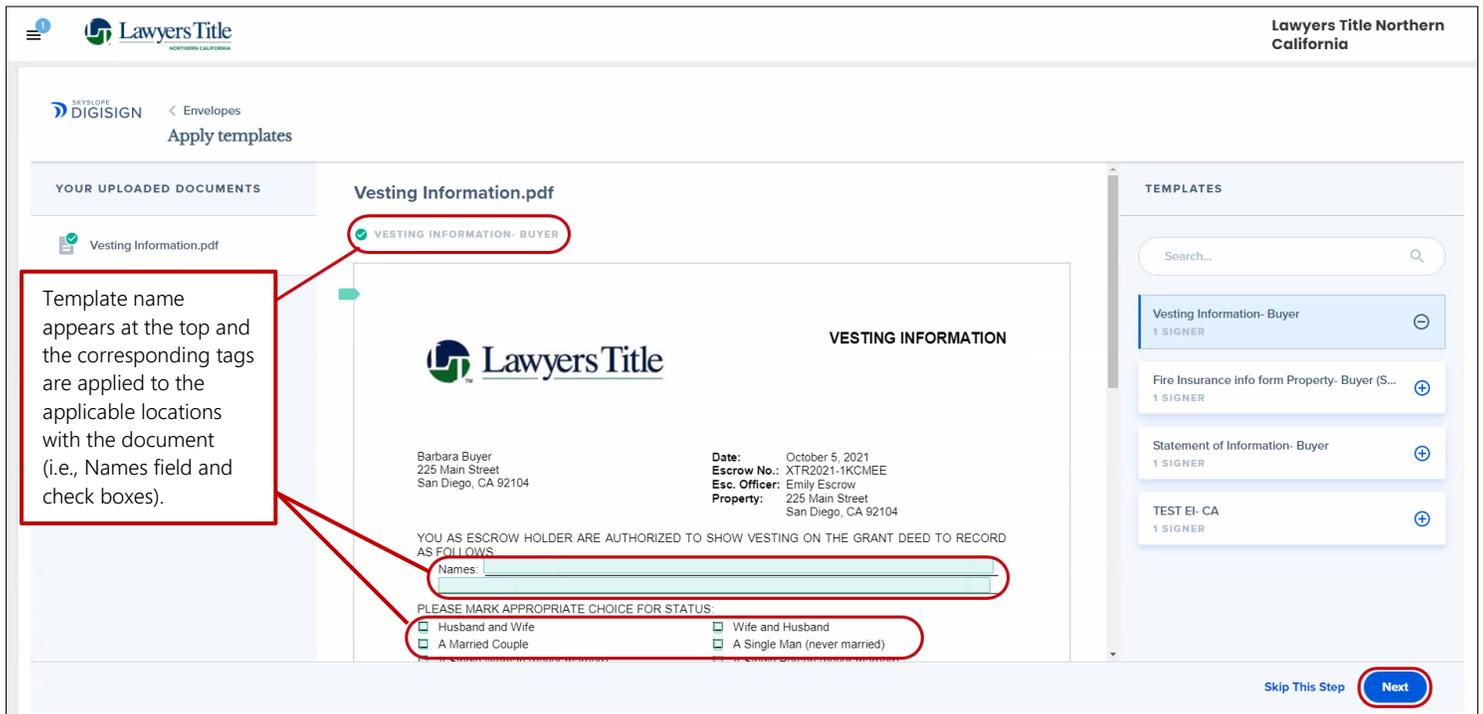
1. Select the Template you wish to apply



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