



The Closing Agent Access is the access used to complete any last Closing Agent actions or tasks. It can be used for things like importing wet-signed documents.

*Note: The Closing Agent access does not allow any e-notarizations.*

## Step 15 – Entering Closing Agent Access

- Click on Closing Agent Access and a green check mark will appear to the left of it.

*Note: The Buyer Access should now say all Tasks completed in green.*

- Click on the “Continue” button.

## Step 16 – List of Documents

Use the List of Docs section to see what documents have tasks remaining.

- Select Incomplete from the drop down to begin tasks.
- Click on the first thumbnail to open the document and complete the required tasks.

## Step 17 – Closing Agent Signatures or Initials (If Applicable)

If there are any incomplete documents that need a Closing Agent’s signature and/or initials (NOT e-notarizations), do the following:

- Click on the page thumbnail that is highlighted with a “Sign Here” banner.
- Find and click on the signature and/or initials tags.
- In the pop-up, click on the “Insert Signature/Initials and Date.”
- Once the signature/initials and date are applied, click on the “Save” button.
- In the Information pop-up click on the “Next Document” button and repeat this step for all remaining incomplete documents.

## Step 18 – Completing Additional Tags (If Applicable)

Text Tags:

- Click on the tag.
- Enter the text.



## Date Tags:

- Click on the tag.
- In the Date Picker pop-up, use the drop downs to select the date.
- Click on the "OK" button.

## Checkbox Tags:

- Click to check or uncheck.

When finished, click on the "Save" button.

## Step 19 – Printing Wet Signature Documents

(Skip this step if there are no documents to print or if you have already printed your wet signature documents before or during closing.)

A wet signature document that is printed has a barcode cover sheet that serves as an identifier for that document. The barcode allows the system to automatically place the document in the correct place when it is imported.

To print one particular document, do the following:

- Use the double arrows to navigate to the document you would like to print.
- Click on the "Print" button.
- In the drop down, click on the "Print" button again.
- In the Confirmation pop-up, click on the "Yes" button.

Note: Once the print is confirmed, this option will irreversibly require the document be wet-signed and imported back into the Order. If this document was digitally signed before printing, it will print with the digital signature(s).

To print ALL documents, do the following:

- Click on the "Print" button.
- In the drop down, click on the "Print All" button.
- In the Confirmation pop-up, click on the "Yes" button.

*Note: Once the print is confirmed, this option will irreversibly require ALL of the Order's documents be wet-signed and imported back into the Order. Any documents that were digitally signed before printing, will print with the digital signature(s).*



## Step 20 – Importing Wet-Signed Documents

(Skip this step if you have already imported all the wet-signed documents in the Buyer Access during closing).

The importing process implicates that the import document will replace the document in the Order.

Before beginning, make sure you have already scanned and saved your wet-signed documents, either as single-document PDFs or a multiple-document PDF file, onto your pc.

Note: The barcode page must be included as the first page of each document when scanning and saving.

- Click on the “Import” button.
- In the Import Document pop-up, click on the “Choose Files” button.
- Find the PDF and open.
- Click on the “Save” button.
- An Information pop-up will confirm the import. Click on the “OK” button.

*Note: If a multiple-document PDF file is imported, it will split automatically into the correct place as long as the corresponding barcode page is the first page of each document.*

Error Pop-Up:

An Error pop-up is caused by:

1. A horizontally (landscape) scanned or printed barcode page
2. Illegible barcode page
3. No barcode page detected
4. Upside down barcode page
5. Incorrect barcode

You can click on the “Try Importing Again” button, however, if it still does not work, you will need to find and correct the issues above, if any.

Force Import:

The “Force Import” button is located on the Error pop-up.

Before clicking on this button, do the following:

- Verify that the PDF being imported matches the document on the screen.
- If it does not match, click on the “X” in the top right corner.
- Use the double arrows to navigate to the document you want to import.
- Click on the “Import” button.



- In the Import Document pop-up, click on the "Choose Files" button.
- Find the PDF and open.
- Click on the "Save" button.
- If the Error pop-up shows up again, click on the "Force Import" button.
- An Information pop-up will confirm the import. Click on the "OK" button.

*Note: Use this button ONLY when importing single-document PDFs. Do not Force Import a multiple-document PDF file.*