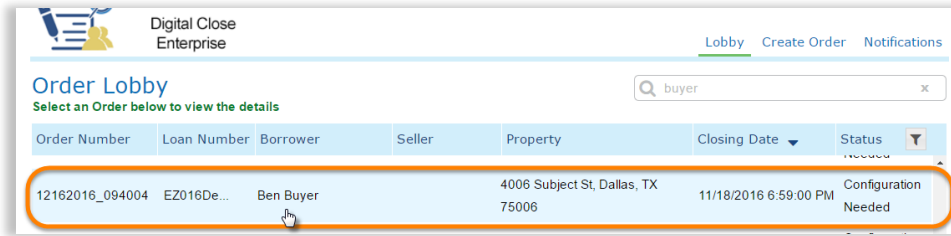


Getting to Know the Configuration Screen

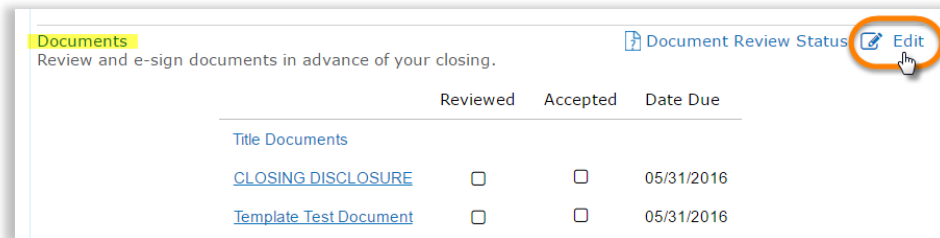
Accessing the "Configuration" Screen



1. In the Digital Close Enterprise Lobby, click on the Order to open.



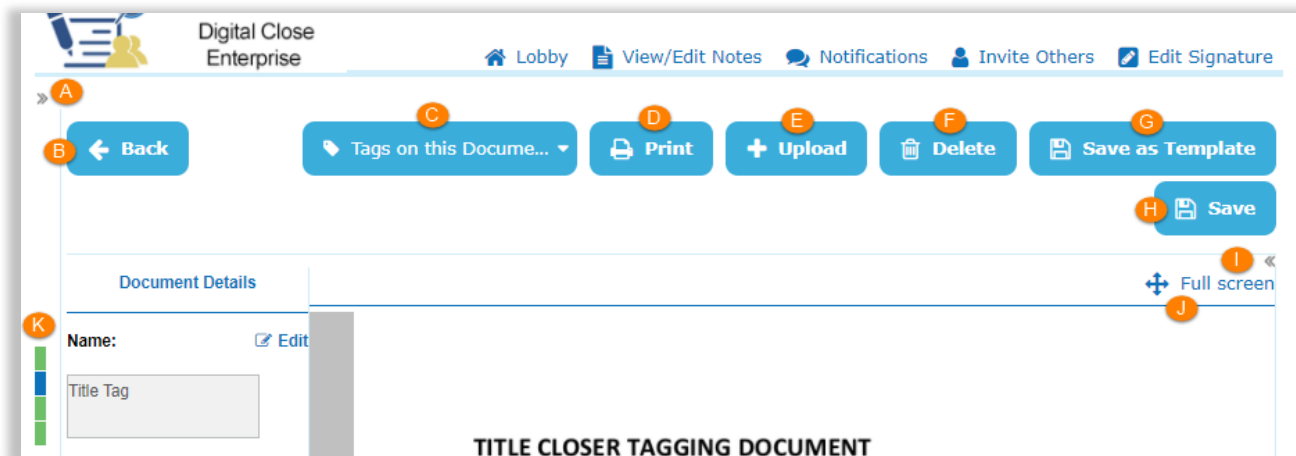
2. Click on the "Edit" link in the "Documents" section.



Note: By default, the screen will open to the first document on the document list.

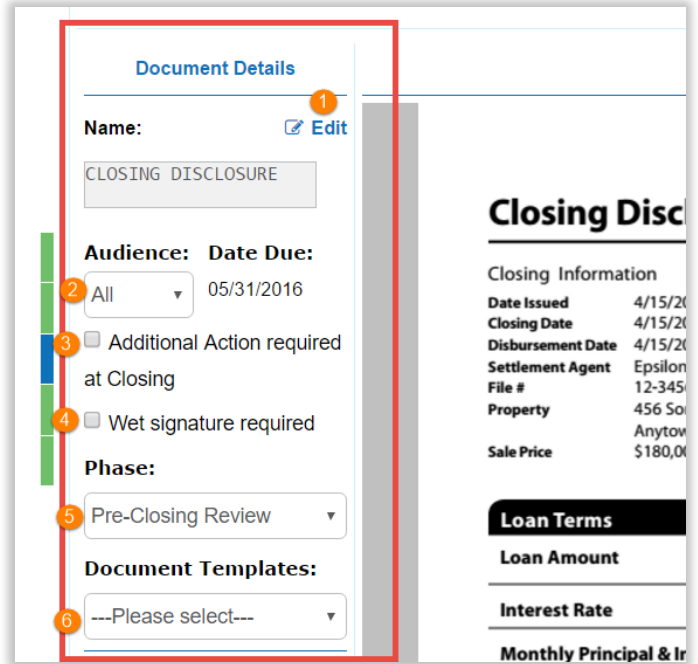
Navigation Buttons

- Double Arrows Pointing to the Right:** Click on this symbol to show Order details.
- Back:** Use this button to go back to the previous screen.
- Tags on this Document:** This button shows a list of tags on the document displayed.
- Print:** Use this button to print out the document displayed (not to be used to print out wet-signs)
- Upload:** Uploads an additional document.
- Delete:** Deletes the document displayed.
- Save as Template:** Saves the document's tag configuration as a template for future use.
- Save:** Saves changes.
- Double Arrows Pointing to the Left:** Click on this symbol to view a different document.
- Full Screen:** Click on this to see the document in a larger view.
- Phase Bar:** This bar has four green portions and 1 blue. The blue portion indicates what phase you are, currently, in. Clicking on any of the green portions will take you to its corresponding phase.



Document Details

1. **Edit:** Use the link to edit the document name field.
2. **Audience:** Select who the document will be visible to.
3. **Additional Action Required:** Use the check box to set the document for special attention or requirement.
4. **Wet Signature Required:** Use the check box to set the document for wet signature.
5. **Phase:** Select what phase the document will show up in.
6. **Document Templates:** Select what document template to apply.



Document Tags

1. **Tag for Signature:** Creates two individual tags.
 - a. Signature with a "Details" box for either a Buyer, Seller, Lender, or Closing Agent
 - b. Date
2. **Tag for Initials:** Creates a tag for initials.
3. **Tag for Education:** Creates a box tag in which to place a link to educational videos, pictures, or documents that provide the Borrower about everything they are signing.
4. **Tag for Notary:** Creates three individual tags.
 - a. eNotary signature
 - b. eNotary seal
 - c. Commission expiration date field
5. **Tag for Text:** Creates a multifunctional tag and "Details" box. You can choose to make it a text tag, date field, or a checkbox on a document.

Note: Tags are all independent from each other and can be moved to different areas of the document.

