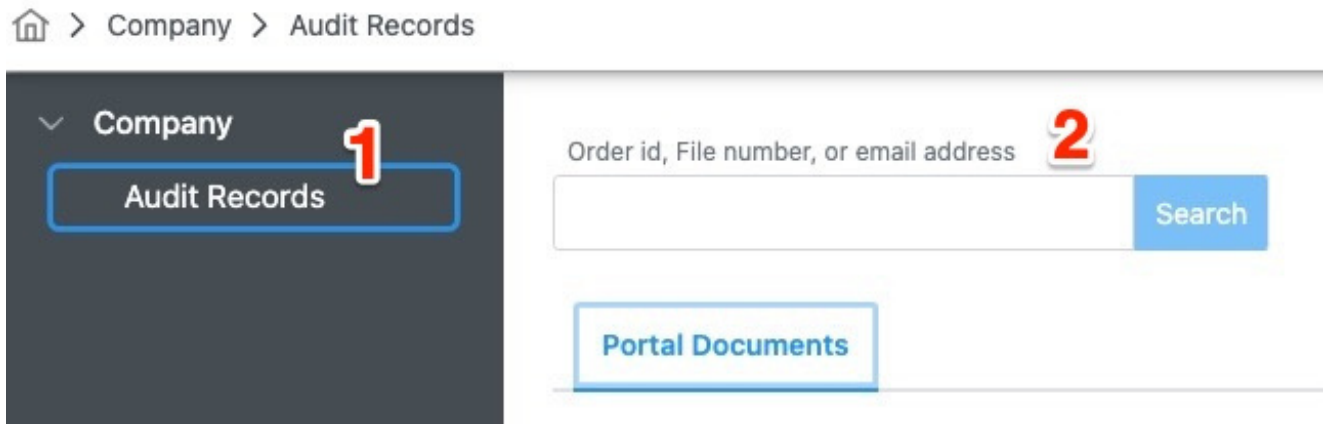


Obtaining copies of forms and portal uploads

You can now obtain copies of completed forms and portal uploads directly from CloseSimple admin.

1. Login to CloseSimple Admin using your username and password. Then on the left hand menu, click on Audit Records.
2. Enter your File Number or Order ID in the search field and click Search
*email addresses are not searchable in Portal Documents



3. Locate the file you would like to obtain a copy of and click Download
Depending on your browser settings the document will either open in a separate browser window or be saved to your Downloads.

Filename ↑↓	Email ↑↓	Role ↑↓	Type ↑↓	UploadDate ↓↑	
CSForm__buyer_CS Form.pdf	██████████@closesimple.com	buyer	CSForm_	2024-09-18T15:24:04.236Z	Download
CSSignedForm__buyer_1bf7_Audit Trail.pdf	██████████@closesimple.com	buyer	CSSignedForm_	2024-09-17T20:15:08.384Z	Download
CSSignedForm__buyer_1_-E-Sign_needed-██████████_closesimple.com.pdf	██████████@closesimple.com	buyer	CSSignedForm_	2024-09-17T20:15:08.105Z	Download

Different Types of Documents to Download:

- CSForm_ is a form that has been filled out but not signed
- CSSignedForm_ is a form that has been completed and signed
- Files with abbreviations such as DL, ID, PP, etc. are files that have been uploaded to the portal from an end user such as a Buyer, Seller or Agents

If you have any additional questions, please reach out to your Customer Success Manager or our Support Team by emailing support@closesimple.com