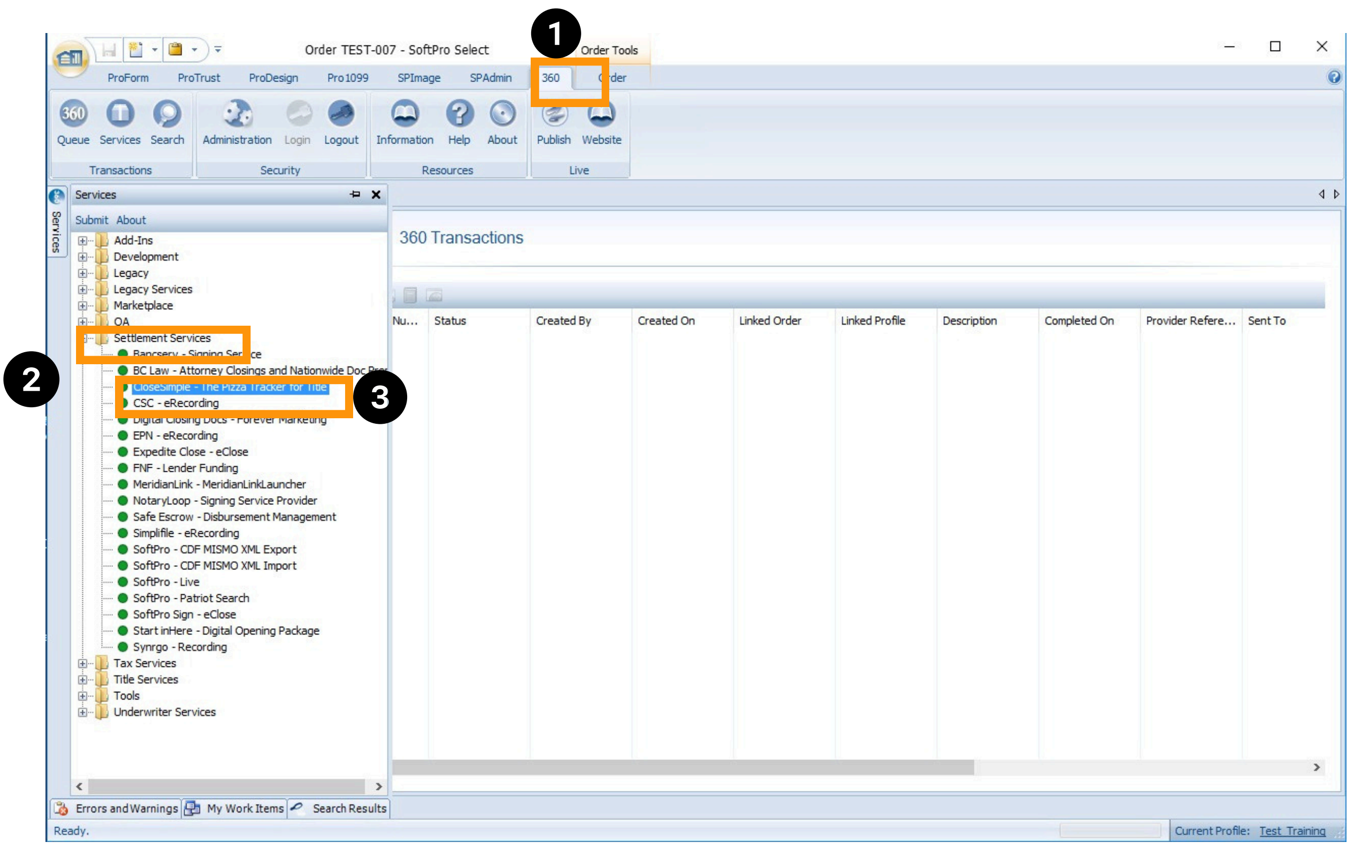
closesimple™

Portal Live Look

Portal live look provides a real time view of the portal for all contacts on a file through the CloseSimple User Interface.

Instructions

Open the file that needs a document(s) signed. Then launch CloseSimple via 360 services.



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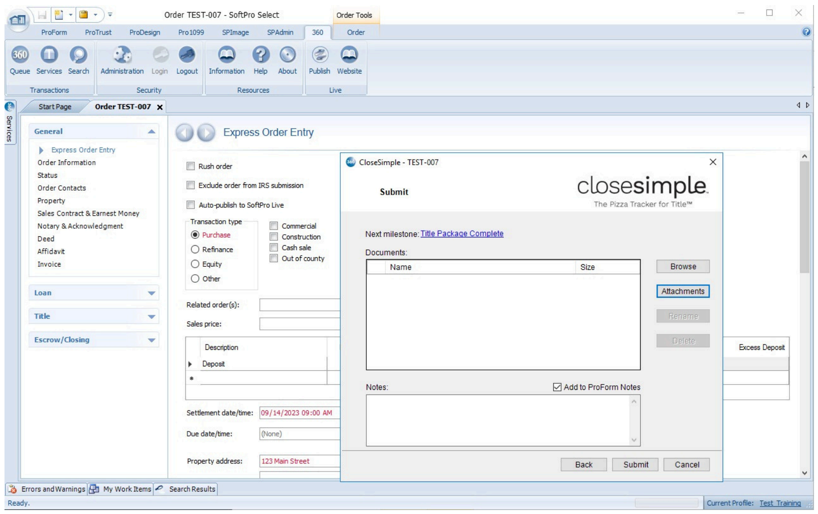
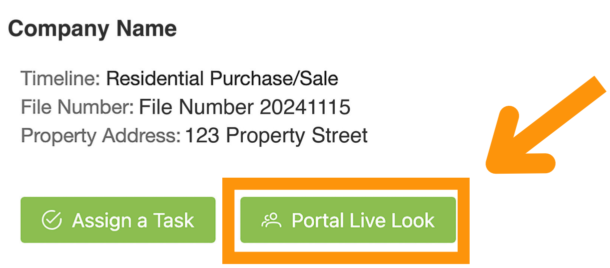
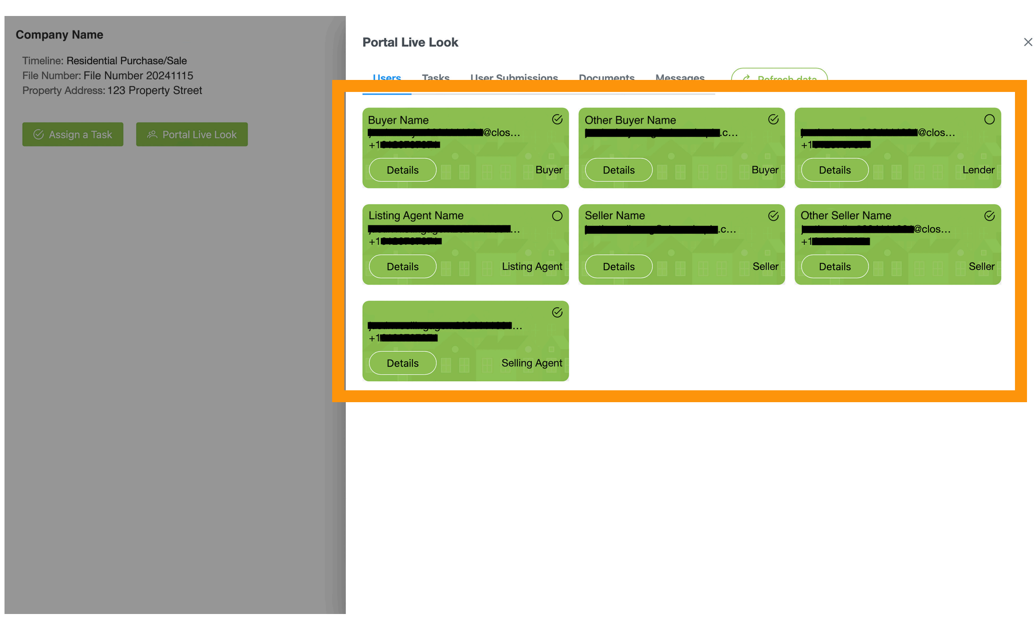
Hit submit to launch CloseSimple.



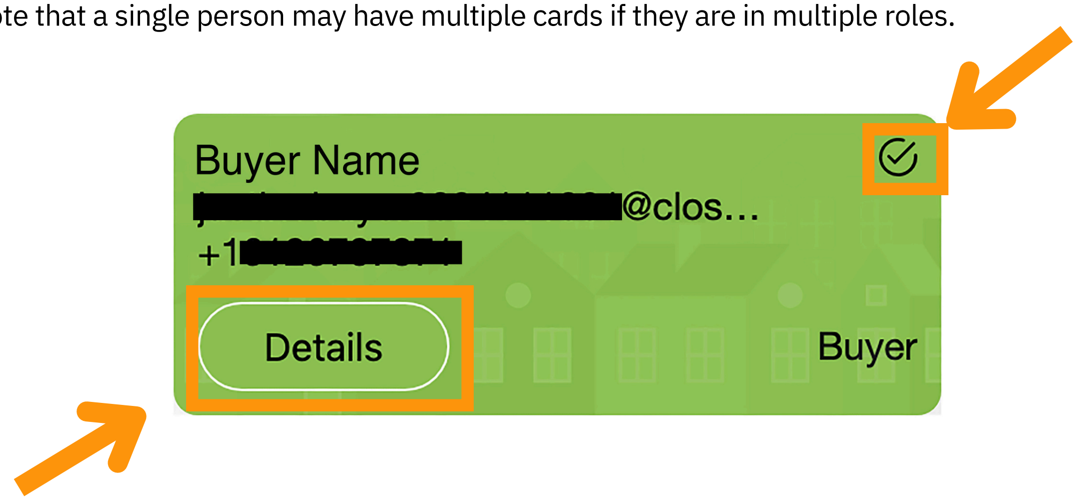
Once in the CloseSimple User Interface, it is accessible through a button labeled “Portal Live Look”



After clicking the button a side panel is displayed. This panel displays a stack of cards, one for each file contact with access to the portal for the current file.



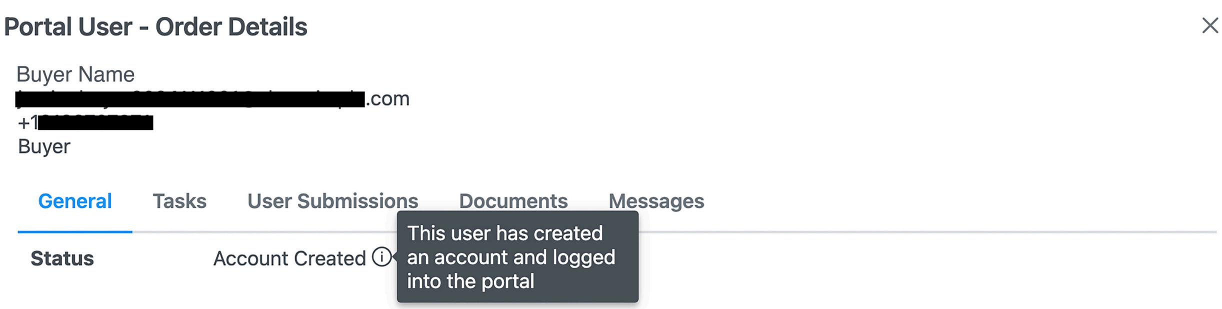
The card shows the name, email, phone number and role for each portal contact. A badge in the top right corner indicates if the contact has completed portal registration.
*Note that a single person may have multiple cards if they are in multiple roles.



Clicking on the “Details” button brings up more information for that portal contact. The details panel shows general information about the contact along with specifics about Tasks, User Submissions, and Documents.

General

The general tab displays the account status of the selected portal contact. The ⓘ provides a detailed subscription of the status.



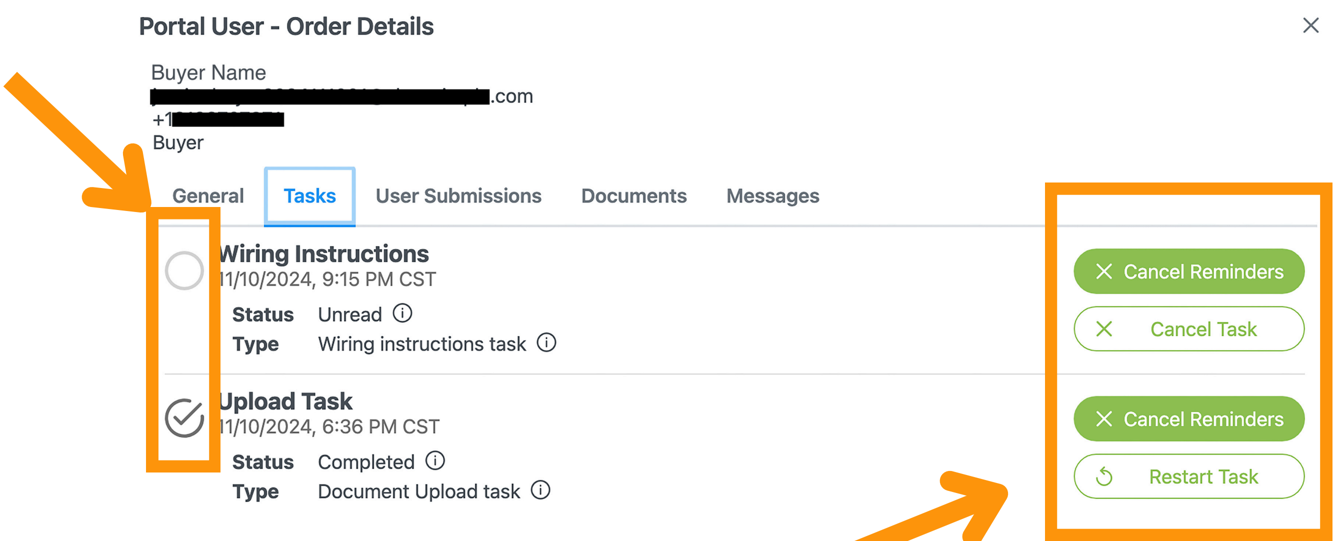
<u>The possible statuses are:</u>

- **No Invite Requested:** This contact is eligible to create a portal account and access this file but has not yet requested an invitation.
- **Invite Requested:** This contact has requested an invitation to the portal but has not completed the account creation process.
- **AccountCreated:** This contact has completed the account creation process and can access the portal.
    - A contact is only required to create an account once. They will automatically be granted access to additional files if the same email address is used.
- **Disabled:** This contact has been disabled and can no longer access the portal for this file.

Tasks

The Tasks tab displays a list of all portal tasks assigned to the contract for this file. Each task displays the task name, date the task was created, current task status, and task type.

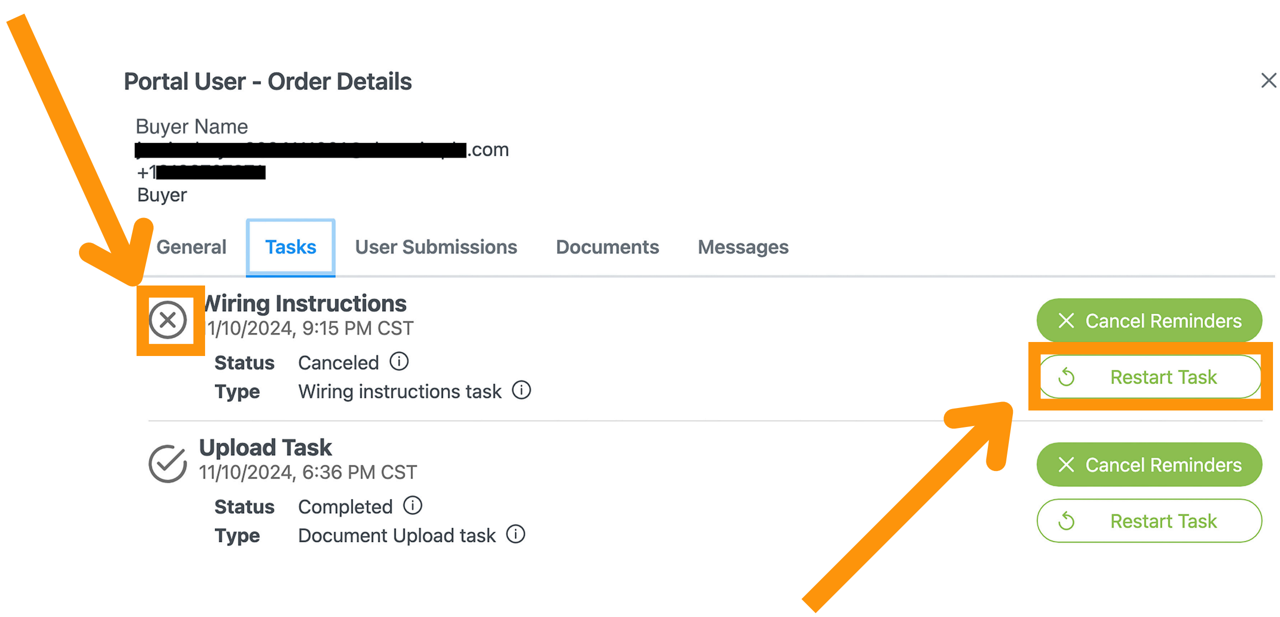
An icon to the left of the task name will show a quick view of the task status. Incomplete tasks will have an empty circle to the left while completed tasks will have a checkmark displayed.



Task management controls are to the right of the Task.

The “Cancel Reminders” button will remove reminders for the task for that portal contact but the task will remain active.

The “Cancel Task” button will mark the task as canceled in the portal for the portal contact. This will also remove reminders for the task for the portal contact. An X will appear in the lefthand circle to show that the task has been canceled.

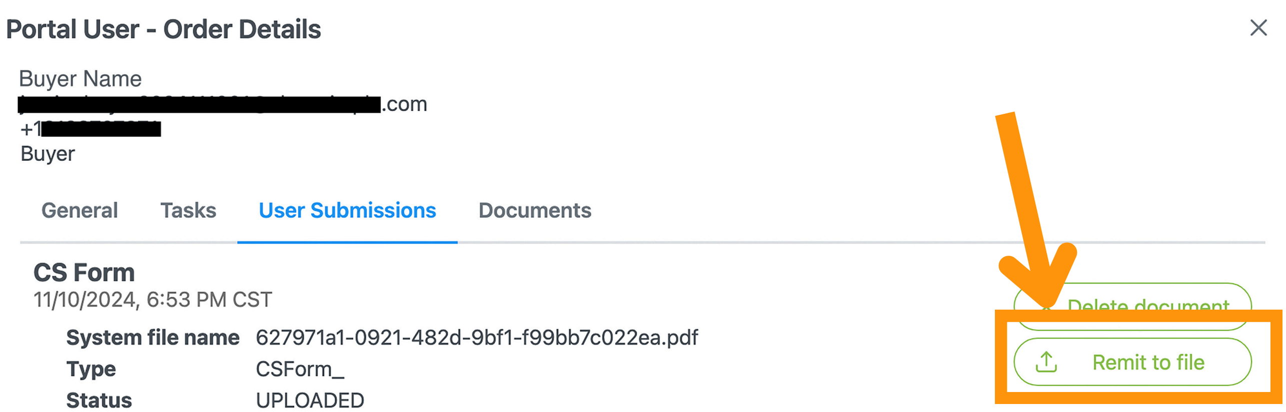


You will have the option to restart the task again by clicking the “Restart Task” button.

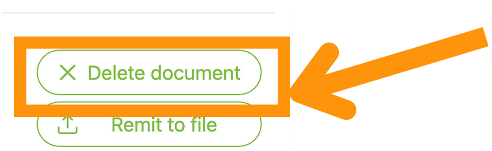
User Submissions

The User Submissions tab lists all completed forms, eSignings, and documents or photos uploaded by the contact through the portal. Each submission displays the filename as it will appear within the file as well as the type of submission and its status.

If a document shows as submitted but is not present in the file, the “Remit to file” button can be used to resend the submission to your title production software.



You can also delete User Submitted items from the Portal in this section. This includes improperly filled out Forms, Signed Forms not needed, and files uploaded through the Portal Upload functionality.



Documents

The documents tab contains a list of all documents that have been sent from the file in your title production software to the portal for that contact. Details include the filename, the date and time the document was added to the portal, and the name of the milestone which included the document. You are also able to delete documents from the Portal from this section (Please note that this will not delete items from your title production software).