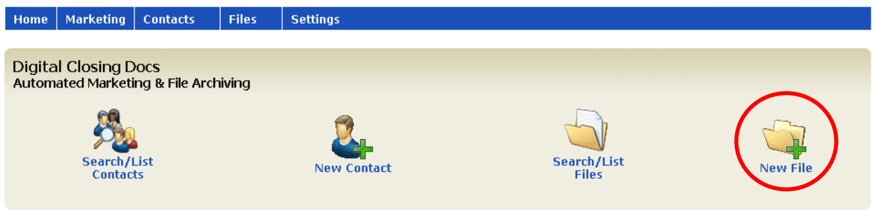
Digital Closing Docs™
with Forever Marketing

SYSTEM INSTRUCTION MANUAL

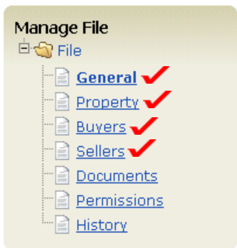
Create A New File In 4 Easy Steps…

1



OPEN NEW FILE: In the Home screen click on "New File" Icon. "

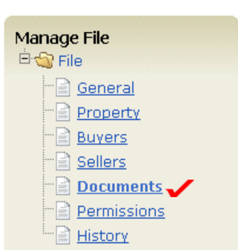
2



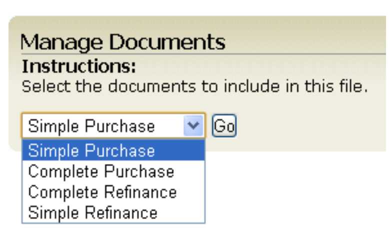
Fill in the information in the first four screens. If you don't have all the file information at first, you can add it later.

- **File Number**: Under General File Information enter branch name from drop down list and your file number . *Click next or "Property" under Manage File*
- **Property:** Enter Property Street Address and Zip Code -- City and State will automatically populate. Click *next or Buyer(s)" under Manage File*
- **Adding contacts to a file**: Click on the **Add Contact** icon in each section. **Search on last name first and select the match**. If no match is found enter as much of the contact information as you can and "save as new customer". Click the **Add Contact** icon again to add additional contacts. ***Note: it is important to add the email for each contact in a file!***
- **Additional Contacts**: Here is a great place to add the Escrow Officer's or attorney's contact information as well as a photo. This person's contact information will be seen every time the documents are accessed by the buyer.
- **Add a photo or additional contact information:** Click on the icon in the appropriate section. Select the **Upload Picture** command or add in additional information. Click **Save** in the upper left-hand corner when complete.
- **Add the Seller's Forwarding Address on all purchases**

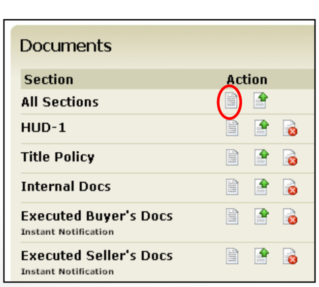
3



On the Documents screen select the transaction type. (We recommend using the "Simple" options at first.)



4



Then select the first <u>All Sections</u> icon to create all scanning barcode cover sheets at once. (if you will be scanning direct to the system.)

System Notes and Helpful Hints

- Use the *"Manage File"* menu to navigate from screen-to-screen. Do not use your browser's "back" button.
- We strongly recommend opening up new files in Digital Closing Docs as soon as you create a new file in your title production software since the system goes to work for you *pre-closing* sending several targeted emails.
- If you are scanning directly to the system from your copier/scanner, we recommend you print all barcode cover sheets pre-closing and keep them in the file.
- If you scan documents to your computer, simply forward them to **upload@digitaldocs.net** for processing (barcode coversheet required).
- Please do not need register a CD when you open a new file. CD registrations should only be done 48 hours, or sooner, to closing.
- To unregister a CD click on the unregister  icon, twice.
- You may contact Support at **support@digitaldocs.net** with questions or to request we call you.

Scanning and Uploading Documents

- Select a transaction type template when setting up a file. We recommend "Simple Purchase" or "Simple Refinance" at first. You can add sections to the file by selecting document sections for the drop down menu towards the bottom of the screen. Custom templates can be created for your company.
- To scan directly to the Digital Closing Docs system from your copier/scanner input upload@digitaldocs.net into the address book of the device. Contact support@digitaldocs.net for FTP set-up assistance. If your scanner is not available you can also fax documents to the system if it is less than about 20 pages.
- If your scanner doesn't allow for "scan to email" (outside your company), continue scanning documents to your personal email or desktop and forward documents to upload@digitaldocs.net (barcode coversheet(s) required.
- You may scan as many documents in one batch as you like. Each document you would like separated and identified must a have a barcode coversheet. You don't have to use any set number of coversheets and it is OK to group multiple documents in one section, such as "Buyer's Executed Docs" or "Miscellaneous".
- To create barcode coversheets click on the corresponding icon on the **Documents** page. To create all coversheets at once click on the icon in "All Sections".
- You can directly upload any electronic document (PDF or TIF) to the system without a barcode coversheet, or scanning. Select the icon on the **Documents** page and browse to the document on your PC or network and select it for upload.
- To view any uploaded document click on the view document icon.
- You can delete any empty section by clicking on the delete command . You cannot delete documents uploaded to the system. Send your document deletion requests to Support.

FAQ's

Q. How many contacts (buyers, sellers, real estate professionals) can I add to a file?
A. You can add contacts without limit.

Q. Is there any cost to open a file on the system if I don't register the CD?
A. Generally no, unless you are frequently uploading large documents to cancelled files.

Q. One of my customers moved to another company. How do I update their contact information?
A. Access their contact record at the Home screen by clicking on "Search/List Contacts". Make changes and update the system by clicking on the **Save** button in the upper-left. *All files for this contact will instantly update.*

Q. Why is it important to enter emails addresses for all parties pre-closing?
A. The Digital Closing Docs™ system goes to work for your company immediately sending several very important pre-closing emails.

Q. Why do I need to enter the seller's forwarding address?
A. The Forever Marketing system markets the listing agent to the seller *at their new home* (not available in all states).

Q. How do I delete a contact?
A. Send all deletion requests to support@digitaldocs.net.

Q. How do I delete a document?
A. Send all document deletion requests to Support.

Q. How do I request a custom document template?
A. Send all custom template requests to Support.

Q. With what software production platforms is Digital Closing Docs™ integrated?
A. We are currently integrated with Ramquest, Title Express and e-Closing. Softpro and Landtech will be complete by first quarter 2012.

Q. When are pre-closing Welcome and Thank you emails sent?

A. Emails are sent automatically as soon as you navigate away from the Buyer or Seller's page.

Q. How do I register a CD?

A. Click on the icon just below the contact's name and enter the 12-digit number on the label of the CD plus the password.

Q. When should I register a CD?

A. <u>Please do not register a CD until 48 hours or sooner to closing.</u>

Q. Can I unregister a CD?

A. Yes! Click on the unregister icon twice. You can now use the CD for any file.

Q. I have a broken CD. Can I replace it?

A. Yes, send replacement requests to Support. Remember to unregister the broken CD if it was previously registered.

Q. I don't know the last four of the social for the password. What else can I choose for the password?

A. Any alpha-numeric combination greater than three characters is permitted.

Q. Can the buyer or seller change their password?

A. Not at this time. If they forget their password, there is a password recovery feature they can use.

Q. How do I send a document to the system?

A. Please refer to the "Scanning and Uploading Documents" page in this manual.

Q. What is the History page in each file?

A. The History page tracks and reports all emails sent from the system.

Q. Do I need to do anything on the Permissions page?

A. Usually, no. Only if you need to make a document permission change as an exception on a file.

Q. The buyer has lost their CD. How do I give them access to their documents quickly?

A. Click on the special "Send Email" icon  just below their name on the Permissions page. This will immediately send them a link to the documents they have permission to access.

Q. How do I order more CD's?

A. Please use our online ordering system. Go to our website, www.digitaldocs.net and click on the "Order" button near the top of the page.

Q. Can I scan the entire file to Digital Docs?

A. Absolutely. The Digital Closing Docs™ system is also state-of-the-art online storage for your company. We have created special sections on the Documents page called "Internal Documents" which can only be accessed by your company. There is no additional charge to use this feature as long as at least one CD is registered per closed file.

Q. How do I add my customers' photos to their contact record?

A. Ask your customer to email you their picture in jpeg format. Copy or save the attachment to your PC's desktop. Then access your customer's contact record at the **Home** screen by clicking on "Search/List Contacts". Click the "Upload Picture" command, browse to the jpeg file and upload. *All files for this contact will instantly update with their picture!*

Q. A homeowner called and said they can't access documents. What do I do?

A. If documents have been uploaded and the homeowner has permission to view them, most likely it is not an issue with the Digital Closing Docs™ system. To confirm this please check the following:

1. Click on the **Preview** command just below their name on the buyer or seller's page. If documents show on the pop-up screen the system is functioning normally.
2. Has a CD has been registered (does the 12-digit number and password display)?
3. Have their documents been uploaded and display on the **Documents** page?
4. Do they have permission to view documents, as indicated on the **Permissions** page.
5. Contact Support if you need additional help.