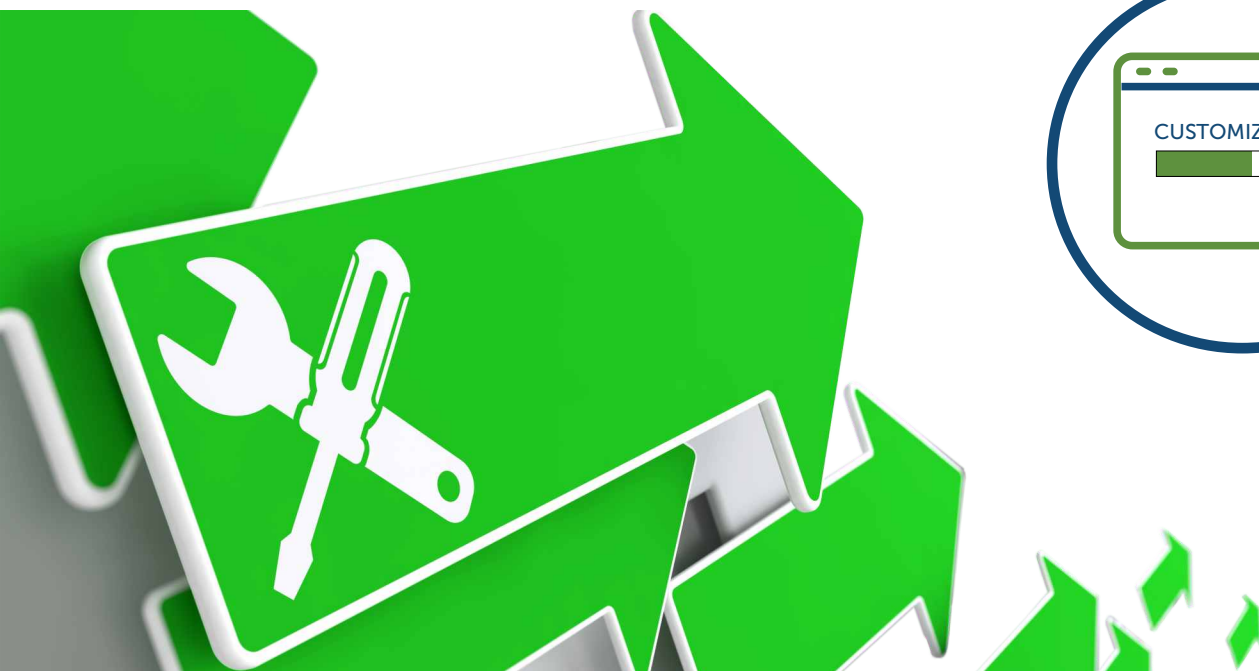




Support@e-closing.com | (603) 485-7951



# CUSTOMIZING THE CLOSING PORTAL





## About

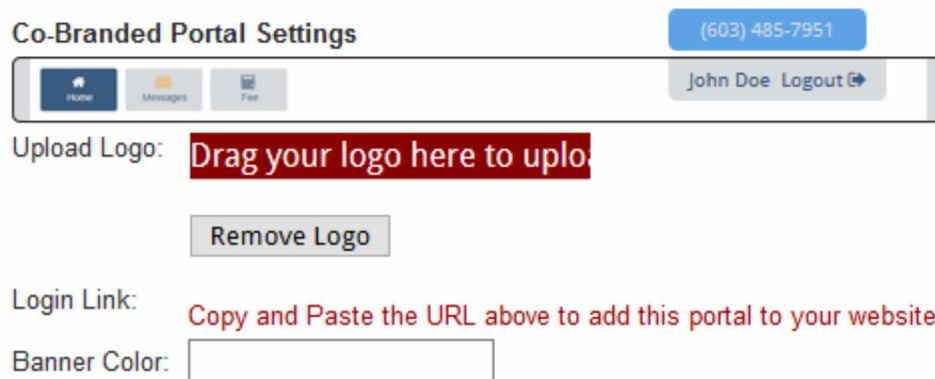
The Closing Portal is a tool intended to assist with secure communication with your various contacts in a reliable, user friendly, and secure manner. It has a variety of features that will help you manage collaborating with your clientele more efficiently.

## Configuring

In order to use the Closing Portal to its fullest potential, you will want to configure it first. Configuration mostly consists of customizing the banner and log in screen so it looks like your company has invested a great deal of money and effort to provide your clients with a top notch closing experience.

Configuration is done in the Rolodex. If your company is not using Settlement Agencies, you will need to access the entry in your rolodex for "This Company". This is accessed from your Whiteboard > Back Office > Rolodex Menu > Manage Rolodex. In the field labeled Select By Company Business Type, scroll to the bottom of the list and select "This Company". If your office is using Settlement Agencies, you will need to configure each Settlement Agency that will be using the Portal. Each Settlement Agency can have a unique logo and banner, so the options are vast.

Once you have opened the appropriate Rolodex entry, the settings you will need to familiar yourself with appear in the lower right of the screen. The image below is the information you will be concerned with.



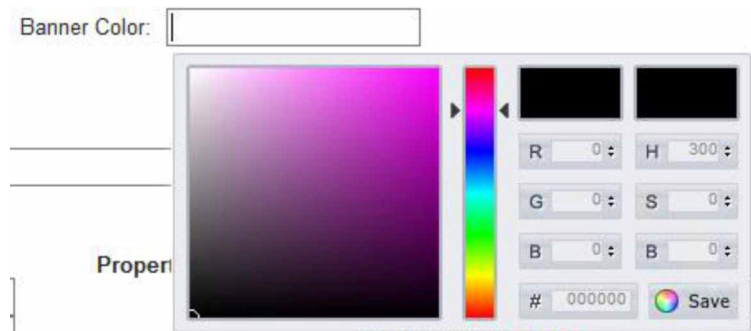
The screenshot shows the 'Co-Branded Portal Settings' interface. At the top, there is a header bar with a blue button labeled '(603) 485-7951' and a user profile section showing 'John Doe' and a 'Logout' button. Below the header, there are three tabs: 'Home', 'Messages', and 'Fee'. The main content area has three sections: 'Upload Logo:' with a red box containing the text 'Drag your logo here to upload' and a 'Remove Logo' button below it; 'Login Link:' with a red text instruction 'Copy and Paste the URL above to add this portal to your website.'; and 'Banner Color:' with an empty white input box.

For the most part, not much is necessary in order to set up the Closing Portal. In fact, nothing is truly required since we pull certain information and display it in a default manner. If you wish to have a more unique look for your company's Closing Portal, you may edit the banner color and add a logo.



## Banner

Your banner is essentially the header at the top of the screen that your clients will see when they access the Closing Portal. It will contain your company's contact number and logo, or a default Closing Portal logo if your company has not selected a logo. This information is pulled automatically, so long as the requisite fields are filled in the Rolodex entry. To edit the banner color, click on the empty field next to the label Banner Color. When you do, a small menu will appear that looks like this.

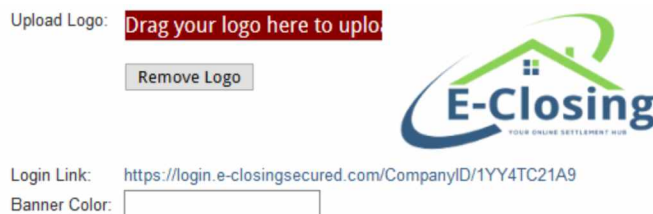


You have three options to select a color. The first is to simply use the slider bars to find a color that you like. Secondly, if you know the RGB and HSB values for the color you wish to use, you can simply type them into the appropriate fields. Thirdly, if you know the Hexadecimal value for the color you have chosen, you can enter that in the field marked with the pound sign.

Once you have chosen your banner color, click the save icon to lock in your choice. If at any point you decide the color isn't right or that you simply want a change, you can come back to this screen and choose a new color.

## Logo

If your company has a logo that it wishes to display in the banner, it can also be uploaded on this screen. There are two ways to upload an image file for this purpose. First, you can simply drag the file from its location on your computer over the red bar that says Drag Your Logo Here To Upload, and drop it. Alternatively, you can click on that bar, and you can search your computer for the image file you wish to use. Once you have uploaded a logo, two new options will become available, as seen below.



First of all, a button will appear that will allow you to delete the logo that you have loaded. If you ever need to change the logo, simply click this button and upload a new one. Secondly, a login link will appear. Your web designer can use this url to create a link to the Closing Portal on your company website. This way, your clients can access your website to find the link instead of trying to find it with an internet search. Bear in mind that if the logo is removed, the link is also removed.

As a note, logos must be in JPEG, PNG, or GIF format in order to load. A logo can be no larger than 255 pixels by 255 pixels in size in order to be loaded.