CREATING USERS FOR THE CLOSING PORTAL

About

Here is a quick guide on how to create Users for the E-Closing secure Closing Portal. If you currently use the Portal, it is similar but with a few more required fields, for security purposes. If you haven't used the Closing Portal in the past, it is easy to get your clients and vendors set up to use it!

Creating Borrower and Seller Client Users

To create a Borrower or Seller Closing Portal User, on their respective Information Screens, fill out their name and address information as usual. There are 2 fields that are required to get a username and password:

1) Cell Phone – We use their cell phone to send a unique code they will enter the first time they log in. This is a form of Two Factor Authentication.

2) Email Address – We will send a Welcome Email to this email address, introducing the Closing Portal and provide a link they will click on to set their password.

At the bottom of their Information Screen, you will see a field labeled E-Closing User with a drop down. It defaults to NO, just toggle it to say YES, click Update, and they will be emailed a Welcome Email.

Creating Vendor Client Users

You can also create Client Users for different Vendors, such a Loan Originators, Real Estate Agents and Abstractors.

To create a Username and Password for your Vendors, simply go in to the Rolodex (Whiteboard -> Back Office -> Rolodex Menu -> Manage Rolodex) and choose the business type the person is associated with (ie: Lender for the Loan Originator) and click on their name. In the bottom section, where the contact information is, please make sure you fill out the following two fields:

1) Cell Phone – This needs to be their cell phone number, so when they get the Introductory Email, they can get their initial password sent to their phone. This is a form of Two Factor Authentication.

2) Email Address - We will send a Welcome Email to this email address, introducing the Closing Portal and provide a link they will click on to set their password. You will also see a drop down that says E-Closing User. This defaults to NO and you can toggle it to YES and when you click Update, they will be sent a Welcome Email.

Resetting Passwords and Updating Cell Phones and Email Addresses

Email Address, please follow these easy steps:

1) From your Whiteboard go to Back Office -> Misc Menu -> Manage Users

2) Select the Client Name from the list of Client Users

3) If you need to change the Cell Phone or Email Address, change it in their respective fields in the top section then scroll to the bottom and click Update User.

4) If you need to reset their password, verify their Cell Phone and Email Address and scroll to the bottom and click Reset Password

Thank You!