Secure Messaging through the Closing Portal

About:

The Secure Closing Portal now has the capacity to send and receive messages between your office and your clients, securely. As we all know, emails are being hacked, and sending Wire Instructions and NPI needs to be done with an abundance of caution. Security experts believe secure portals like our Closing Portal is the only secure way information like this should be communicated.

Sending Secure Messages and Documents:

To access the messaging feature, you can open any file from your Whiteboard. At the top of the screen, you will see an icon that looks like the outline of an envelope.
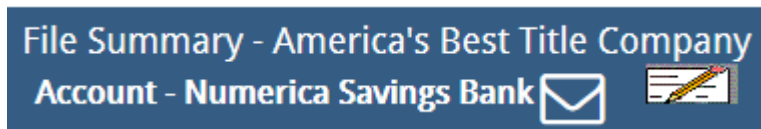
If you click on this icon, a new tab or window will open, and you will be taken to the Messaging screen. Here, you can send messages or files, and manage your received messages.
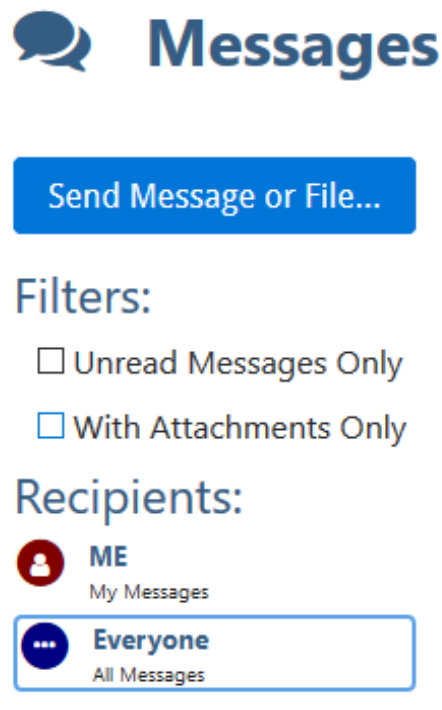
To send a message from this screen, click on the blue button labeled Send Message or File. The first section is titled Select Recipient(s). This will have a list of any person or entity associated with the file that is listed as an E-Closing user. Select the addressee

you wish to send the message to. If you need to send the same message to multiple recipients on the list, simply hold down Shift on your keyboard and click on each recipient. This will send the message simultaneously to each one. After you have selected your recipients, you have the option to add a subject line, attachments, and edit the body of the message. Once you have made your changes, you can click Send Message to send the message, or Cancel if you decide not to.

Please note with the attachments, you can only send attachments that are already saved in the file. At this time, you cannot browse your computer or drag and drop documents.

Once you have sent a message, you can view it again on the Messaging screen by clicking on the appropriate person's name in the list of Recipients. If you want to look at all of the messages you've sent, you can click on the ME icon. To view message chains between you and a particular recipient, click on their name in the list.

Each message has a date and time stamp, so you can keep track of when a message was sent and when a response, if any, is received. Unread messages will have a light yellow background so you can see which messages you've sent are still unread.

You can also send documents directly from the Document Management Screen. Previously, there was an option "Save for E-Closing Users". We have changed this to read "Message to Portal" and you can select who it should go to and add a custom message as well.

If your clients have not read a message within 15 minutes of it being sent they will be notified by email or text, depending on their communication preferences, that they have a new secure message awaiting them in the Closing Portal.

Receiving Secure Messages and Documents:

Closing Portal users can now message you back within the portal and can also send documents. This communication will no longer go to your email so you are not having to check various sources or systems for file related correspondence. Everything will be in one secure location. When a client responds to you, you will see the Envelope flashing on the Whiteboard and the number of unread messages your company has received.

You can also add a new column to your Whiteboard "messages", which will also flash with the number of unread messages you have for that file.

Simply click on the envelope and read your message.

Closing Portal Users will have the ability to change how they would like to be alerted to new messages. They can enter their Cell Phone Number (email address defaults), or they can remove both email and cell phone, if they wish to not be informed of a new message. To do this, when they are logged in to the Portal, they will see their name in the top right corner. Click on that, and they will see an option named Preferences. If they click on Preferences, they will see the options below:

Isn't Scout cute? He is our new mascot who will help you see what your client sees! You will see him through the Closing Portal System, and he is there to help you and your Closing Portal Users.