Sending Documents

To email documents:

1. Open a loan and select the **Documents** activity.

2. Click the row of the document you want to access.

The document's details screen appears. The ***Document Details*** section contains the document name, category, and type. The condition fields are populated if any conditions were issued against this loan for the current document. The version table shows whether the document is active, the current document version, who reviewed the document and the date and time, the expiration date, and any comments. Each time a document with the same category and type of an existing document is added, you can increment the version by one or leave it as is.

3.   Click **Email**.
The **Send Document** light box appears.

A.   Enter the *Recipient's Email*.

B.   Enter the *Subject* and *Message*.

C.   To encrypt the document, select the **Password** radio button and enter the password in the corresponding field. Otherwise, select **No Password**.

> NOTE: Use any combination of alpha, numeric, and special characters to create your password. The password is case-sensitive.

D.   If you added note(s) to the document and want to include the note(s) in the email, select the **Include notes in download** check box.

E.   To add more documents to the email, click **Add From Documents**.
The **Document Management List** light box appears.

Document Management List

	Type	Description	By	Date & Time	Version
	Uncategorized				
☐	Uncategorized	User Loan Assignment		01/17/2020 3:36:32 PM	1
☐	Uncategorized	Loan Details		01/17/2020 3:37:12 PM	1
	Disclosure				
☐	Other	AD-3030 Rep's Regarding Felony ...		01/14/2020 6:22:47 PM	1
	Form				
☐	Acknowledgement of Rec...	Acknowledgement of Receipt of Ho...		01/21/2020 1:53:16 PM	1
	Assets				
☐	Bank Statement	BS		01/20/2020 4:56:35 PM	1
	Processing				
☐	Qualified Mortgages	Qualified Mortgage Finding		01/21/2020 5:06:26 PM	1
☐	Qualified Mortgages	Qualified Mortgage Finding	Path User	12/23/2019 10:26:48 AM	1

Show Active Only ☐   Stacking Order ▼

Select

       i. Select the check box(es) of the document(s) to be added.

      ii. Click **Select**.
          The new document(s) are added to the *Documents* section, below the original document.

Documents	Description	Category	Type	
	Qualified Mortgage Finding	Processing	Qualified Mortgages	🗑
	BS	Assets	Bank Statement	🗑

Document Password Protection

🗑

G.   Click **Send**.
A message appears confirming the document is sent. And the *Document History* section is updated regarding the when the document was emailed and by whom.