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Closing Manager



- Steps to setting up your Closing Manager Portal
 1. Once you receive the invention email from your pre-closer to set up your closing manager, you click the link provided
 2. After clicking the link, verify that the address and name is spelled correctly
 3. Accept the terms & conditions, after you will be prompted to choose a password for closing manager
 4. After making a password you will be directed to authorize your account by either Text Message or Phone Call
 - You will authorize the account, so that no one can go into your account to steal your information
 5. Lastly, you will receive a 7-digit code to plug in to the portal to authorize it, after putting in the code you will be taken to your closing manager page
 6. If you already have an account set up, all that you will need to do is sign in with your login information and find the address connected to the property you are buying or selling
 - If you have forgotten your password, click on forgot password and you will receive a new link to create the password, you will also need to verify your account again to make sure it is you.



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- About your closing manager portal
 1. Conversion Log
 - Where you can message your Settlement Agent about the closing
 2. View Documents
 - Where you will find documents necessary for the closing
 - You will need to view the Wire Fraud Disclosure and put in your initials to verify that you viewed the document
 3. Upload Documents
 - Where clients and agents can upload any document needed for the closing
 4. Info sheets
 - You will need to click on the information sheet and fill out the information needed
 - Once completed closing manager will send us a snapshot of the information sheet completed
 5. About your closing
 - Where you can find the property address, date of closing, location of the closing, and names of buyers & sellers
 6. Closing Team
 - Where you can find who the agents are and everybody else associated with the closing