



How to Send a Secured Email Through Calyx Point

Step One:

Click on the document manager icon on the top left corner of the screen.

Click here *step 1*

Point - [Untitled]
File Edit Marketing Forms LoanFile Verifs Track Banker Lenders Services Interfaces Bor/Co-Bor Utilities Window Help

*Navigation Panel

Active Leads (PDS)

Borrower Information

Borrower Information

Borrower: Copy from Borrower

Name: First, Middle, Last, Suffix
SSN: DOB

Best Contact: Nickname
H Phone: B Phone
Cell/Alt: Fax
E-Mail: missmolyka@gmail.com

Present: Own Rent No of
Street
City: State Zip
Country: United States

Subject Property: Copy From Present Address

Street
City: State Zip
County
Property Type

Loan Summary

Loan Program: Purchase No Cash-Out Refi Cash-Out Refi Construction
CC Scenario

Originator

Co-Borrower: Copy from Borrower

Name: First, Middle, Last, Suffix
SSN: DOB

Best Contact: Nickname
H Phone: B Phone
Cell/Alt: Fax
E-Mail

Present: Own Rent No of
Street
City: State Zip
Country: United States

Credit Scores

	Brw	Co-Brw
Experian/FICO		
TransUnion/Empirica		
Equifax/BEACON		
Minimum FICO		

Note Rate: % Term/Due: / mths
Appr Value: LTV: %

Step Two

Click on the 'add' tab to select the document from your computer.

Step 2

CLICK HERE

The screenshot shows the 'Document Management' application window. At the top, there is a 'Stacking Order' dropdown menu and a 'Restack' button. Below this is a 'Show' section with a checked 'Inactive' checkbox and a 'Package Type' dropdown set to 'All'. A search bar labeled 'Search Descriptions' is on the right. The main toolbar contains buttons for 'Add...', 'Edit', 'Delete', 'Email', 'Print', 'Save As', 'Send/Retrieve...', and 'Package Data'. The 'Add...' button is highlighted in yellow. Below the toolbar is a table with columns: 'Sto...', 'A...', 'Cat...', 'Bo...', 'Co...', 'Type', 'Description', 'Package...', 'Packa...', 'Receiv...', and 'Stor...'. The bottom of the window is split into two panes: 'Document Details' on the left and 'Document Preview' on the right. The 'Document Details' pane contains various input fields for document metadata, including 'Stored', 'Received From', 'Size' (with 'MB' and an 'Active' checkbox), 'Category', 'Type', 'Borrower', 'Co-Borrower', 'Description', 'Package', 'Sent To Borrower', and 'Viewed By'. The 'Document Preview' pane is currently empty.

Step Three

Select the document from your computer folder by clicking on 'add selection'. Then click 'OK'.

The screenshot shows the 'Document Management' application window. At the top, there is a 'Stacking Order' dropdown and a 'Restack' button. A search bar for 'Search Descriptions' is on the right. Below this, there are filters for 'Show' (with a checked 'Inactive' checkbox) and 'Package Type' (set to 'All'). A toolbar contains buttons for 'Select Document(s)', 'Select All', 'Deselect All', 'Move', 'Up', 'Down', 'View...', 'Compare...', 'Add...', 'Edit...', 'Delete', 'Email...', 'Print', 'Save As...', 'Send/Retrieve...', and 'Package Data...'. A table with columns 'Sto...', 'A...', 'Cat...', 'Bo...', 'Co...', 'Type', 'Description', 'Package', 'Packs...', 'Receiv...', and 'Stor...' is visible but empty. A 'Document Details' section at the bottom left contains various input fields for 'Stored', 'Received From', 'Size' (with 'MB' and an 'Active' checkbox), 'Category', 'Type', 'Borrower', 'Co-Borrower', 'Description', 'Package', 'Sent To Borrower', and 'Viewed By'. An 'Add Selection' dialog box is open in the center, with two radio buttons: 'Add File from Computer' (selected) and 'Add Point Form'. The 'OK' button is circled in red. Handwritten red text 'Step 3' and 'Select Doc from computer' with an arrow pointing to the dialog is overlaid on the image.

Step Four

Please note that the document you choose will automatically convert to a PDF.

The screenshot displays the 'Document Management' software interface. At the top, there is a 'Stacking Order' dropdown menu and a 'Restack' button. Below this is a search bar for 'Search Descriptions' and a 'Search' button. A toolbar contains various actions: 'Show', 'Inactive', 'Package Type' (set to 'All'), 'Select Document(s)', 'Select All', 'Deselect All', 'Move', 'Up', 'Down', 'View', 'Compare', 'Add', 'Edit', 'Delete', 'Email', 'Print', 'Save As', 'Send/Retrieve...', and 'Package Date'. A table with columns 'Sto...', 'A...', 'Cat...', 'Bo...', 'Co...', 'Type', 'Description', 'Package', 'Packa...', 'Receiv', and 'Stor...' is visible but empty. Handwritten red annotations include 'Step 4' with an arrow pointing to a 'Converting to PDF...' dialog box, and 'It automatically converts to PDF' with a smiley face. The dialog box contains the text 'Converting logo.html to PDF...'. Below the dialog is the 'Document Details' section with fields for 'Stored', 'Received From', 'Size' (MB), 'Category', 'Type', 'Borrower', 'Co-Borrower', 'Description', 'Package', 'Sent To Borrower', and 'Viewed By', along with checkboxes for 'Active' and 'Signature Required'.

Step Five

First input the document type, located in the top right-hand corner. Then click on 'add', which will upload and show your document in the borrower's management folder.

Step 5

Document Information Preview

Stored	03/19/2019 08:52:34 PM	By	bdmgadmin23	Category	All
Received From	[Redacted]			Type	input type then
Size	0.193 MB	<input checked="" type="checkbox"/> Active	<input type="checkbox"/> Restrict To Secondary Marketing	Description	credit card authorization.pdf
Borrower	[Dropdown]	Signature Type	[Dropdown]	Package	[Dropdown]
Co-Borrower	[Dropdown]	Signature Type	[Dropdown]	To	[Dropdown]
Sent To Borrower	[Dropdown]	By	[Dropdown]	By	[Dropdown]
Viewed By	[Dropdown]	<input type="checkbox"/> Signature Required			

Show Thumbs (Rotate, Extract, Delete, Reorder pages)

BD Mortgage Group
Turning Dreams into Reality

CREDIT CARD AUTHORIZATION FORM

Please print, complete and sign this form and email or fax it back to:
Email: Support@BDMortgageGroup.com Fax: (813) 217-4666

All requested information and documentation is required or we cannot process the order.

Cardholder's Name: _____

Click here

document appears here

Step Six

Highlight the document you uploaded to the borrower's management folder then click on the 'email' tab.

Step 6

The screenshot shows the Document Management interface. At the top, there is a 'Stacking Order' dropdown and a 'Restack' button. Below that is a search bar for 'Search Descriptions' and a 'Search' button. A filter bar shows 'Show' with a checked 'inactive' checkbox and a 'Package Type' dropdown set to 'All'. A toolbar contains buttons for 'Select Document(s)', 'Select All', 'Deselect All', 'Move', 'Up', 'Down', 'View...', 'Compare...', 'Add...', 'Edit...', 'Delete', 'Email', 'Print', 'Save As...', 'Send/Retrieve...', and 'Package Date...'. The 'Email' button is highlighted in yellow. Below the toolbar is a table with columns: 'Sto...', 'A.', 'Cat.', 'Ba...', 'Co-', 'Type', 'Description', 'Package', 'Packs...', 'Receiv...', and 'Stor...'. The first row is highlighted in blue and contains the text: '03/19/2019', 'All', 'credit doc', 'credit card authorization.pdf', and 'bdmgadmin23'. Below the table is a detailed view of the selected document, including fields for 'Stored' (03/19/2019 06:52:34 PM), 'Received From', 'Size' (0.193 MB), 'Category' (All), 'Type' (credit doc), 'Borrower', 'Co-Borrower', 'Description' (credit card authorization.pdf), 'Package', 'Sent To Borrower', and 'Viewed By'. Handwritten red annotations include 'Step 6' at the top, 'high-light Doc then click here' with arrows pointing to the highlighted row and the 'Email' button, and 'Document is saved to borrower's file' written in red cursive.

Sto...	A.	Cat.	Ba...	Co-	Type	Description	Package	Packs...	Receiv...	Stor...
03/19/2019		All			credit doc	credit card authorization.pdf				bdmgadmin23

Stored: 03/19/2019 06:52:34 PM By: bdmgadmin23

Received From: _____

Size: 0.193 MB Active

Category: All

Type: credit doc

Borrower: _____ Signature Type: _____

Co-Borrower: _____ Signature Type: _____

Description: credit card authorization.pdf

Package: _____ To: _____

Sent To Borrower: _____ By: _____

Viewed By: _____ Signature Required

ed Prev

Document is saved to borrower's file

Step Seven

Name the PDF file then click 'OK'.

The screenshot shows the Document Management interface. At the top, there are search and filter options. Below that is a table with columns: Sto., A, Cat., Bo., Co., Type, Description, Package, Packa., Receiv., Stor. The first row is selected and contains: 03/19/2019, All, credit doc, credit card authorization.pdf. Below the table is a detailed view of the selected document, including fields for Stored, Received From, Size, Category, Type, Borrower, Co-Borrower, Description, Package, Sent To Borrower, and Viewed By. A dialog box titled 'Email Document' is open, showing the file name 'credit card authorization' and the option 'Email as PDF'. The 'OK' button is highlighted in yellow. Handwritten red text 'Step 7' and 'click ok' with an arrow points to the OK button.

Sto.	A	Cat.	Bo.	Co.	Type	Description	Package	Packa.	Receiv.	Stor.
03/19/2019		All			credit doc	credit card authorization.pdf				bdmgw

Stored: 03/19/2019 05:52:34 PM By: bdmgw

Received From: [Empty]

Size: 0.193 MB [Active]

Category: All

Type: credit doc

Borrower: [Empty] Signature Type: [Empty]

Co-Borrower: [Empty] Signature Type: [Empty]

Description: credit card authorization.pdf

Package: [Empty] To: [Empty]

Sent To Borrower: [Empty] By: [Empty]

Viewed By: [Empty] [Signature Required]

Email Document dialog box:
File: credit card authorization
Email as PDF
OK (highlighted)
Cancel

Handwritten notes:
Step 7
click ok (with arrow pointing to OK button)

Step Eight

Choose a password for the PDF document. I recommend using the last four of the borrower's social security number. Then click 'OK'. Please remember to tell the borrower what the password is so that they can unlock the document themselves.

Let them know it's the last four of their social via a phone call – **DON'T WRITE/TYPE THE NUMBERS IN THE EMAIL.**

The screenshot shows the 'Document Management' interface. A 'Set PDF Password' dialog box is open, with the following details:

- Stacking Order: [Dropdown]
- Search Descriptions: [Search]
- Show: Inactive Package Type: All
- Buttons: eDisclosure, Unknown, Conversation Log
- Buttons: Select Document(s), Select All, Deselect All, Move, Up, Down, View..., Compare..., Add..., Edit..., Delete, Email..., Print, Save As..., Send/Retrieve..., Package Date...
- Table:

Sto...	A...	Cat...	Bo...	Co...	Type	Description	Package	Packa...	Receiv...	Stor...
03/19/2019		All			credit doc	credit card authorization.pdf				bdmga
- Stored: 03/19/2019 06:52:34 PM By: bdmga
- Received From: [Field]
- Size: 0.193 MB
- Category: All
- Type: credit doc
- Borrower: [Field] Signature Type: [Field]
- Co-Borrower: [Field] Signature Type: [Field]
- Description: credit card authorization.pdf
- Package: [Field] To: [Field]
- Sent To Borrower: [Field] By: [Field]
- Viewed By: [Field] Signature Required

Handwritten notes in yellow and red:

- 'step 8' is written in yellow above the dialog box.
- 'INPUT PASSWORD and select OK' is written in yellow to the right of the dialog box, with an arrow pointing to the password field.
- '* Remember to tell borrower the password to unlock the document *' is written in red below the dialog box, with an arrow pointing to the 'OK' button.

Step Nine

Choose your email account and click 'OK'. Make sure you have the compatible Microsoft Outlook on your computer. You may call Calyx Point for support:

Calyx Point customer service is available Monday through Friday, 8 a.m. to 6 p.m. Central at 800.342.2599

The screenshot shows the Document Management application window. At the top, there is a 'Stacking Order' dropdown and a 'Restack' button. Below that is a search bar for 'Search Descriptions' and a 'Show' section with a checked 'Inactive' checkbox and a 'Package Type' dropdown set to 'All'. A toolbar contains various actions: 'Select Document(s)', 'Select All', 'Deselect All', 'Move Up', 'Move Down', 'View...', 'Compare...', 'Add...', 'Edit...', 'Delete', 'Email...', 'Print', 'Save As...', 'Send/Retrieve...', and 'Package Date...'. A table lists documents with columns: 'Sto...', 'A...', 'Cat...', 'Bo...', 'Co...', 'Type', 'Description', 'Package...', 'Paaka...', 'Receiv...', and 'Stor...'. The first row is highlighted in blue and contains: '03/19/2019', 'All', 'credit doc', 'credit card authorization.pdf', and 'bdmgad...'. Below the table is a 'Choose Profile' dialog box with a dropdown menu showing 'bdmortgagegroup.com - G Suite' and buttons for 'Options >>', 'OK', and 'Close'. A red arrow points from the 'OK' button to the handwritten text 'click OK'. Handwritten yellow and red annotations include 'Step 9', '* Make sure you have Microsoft Outlook on computer', and 'click OK'.

Sto...	A...	Cat...	Bo...	Co...	Type	Description	Package...	Paaka...	Receiv...	Stor...
03/19/2019	All	credit doc			credit card authorization.pdf					bdmgad...

Choose Profile

Profile Name: **bdmortgagegroup.com - G Suite**

Options >> OK Close

click OK

Step 9

* Make sure you have Microsoft Outlook on computer

Step 10

At this point, your document is now password secured. Please be sure to advise your borrower of the password so that they can unlock and retrieve the document.

Let them know it's the last four of their social via a phone call – **DON'T WRITE/TYPE THE NUMBERS IN THE EMAIL.**

