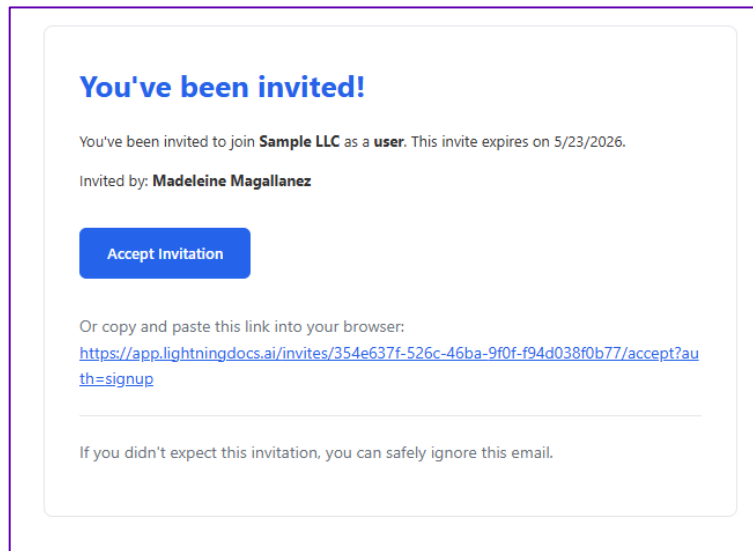
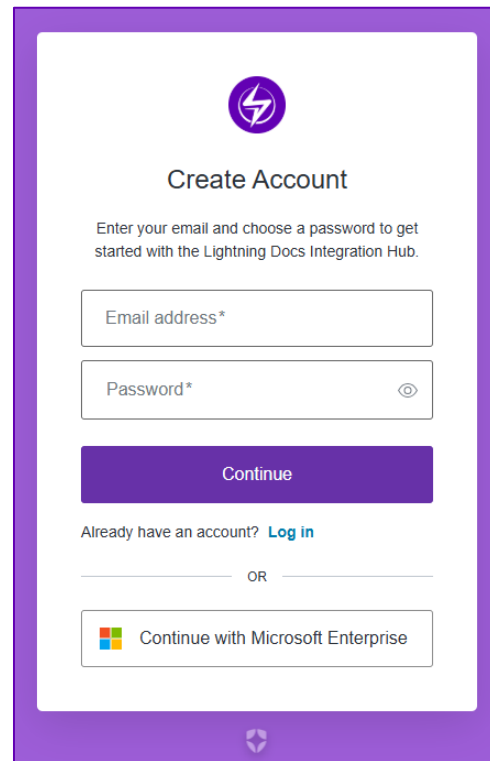


Lightning Docs: Integration Hub User Guide

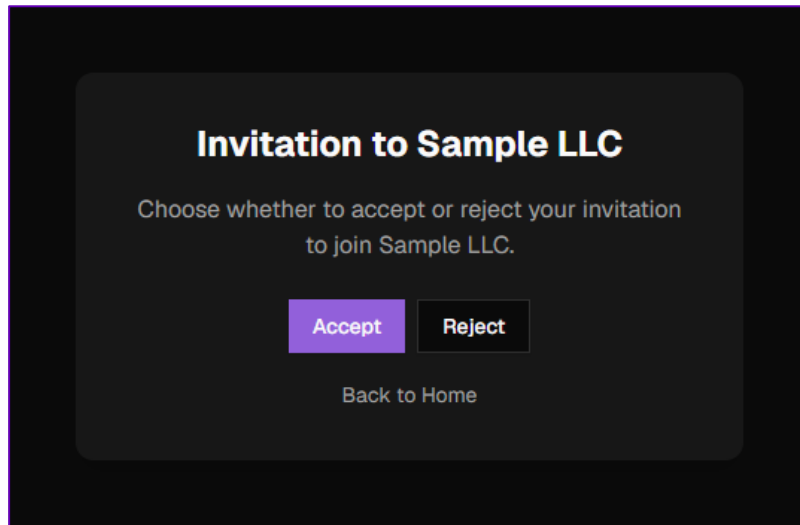
- 1) Each user of Lightning Docs from your organization will receive the below email from no-reply@lightningdocs.ai. If you do not receive this email in the next few minutes, please check your spam or quarantine inboxes. If it is not found there, please let the Lightning Docs team know and we will assist.



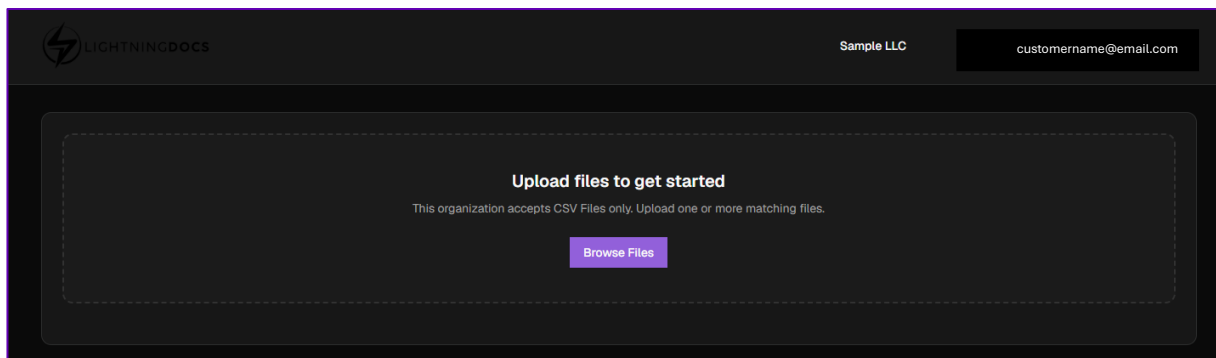
- 2) Click "**Accept Invitation**" or copy and paste the provided link into a browser. The following page will appear.
 - I. If the email used for sign-up is a company-managed Microsoft email, select the "Continue with Microsoft Enterprise" button.
 - II. Alternatively, enter your email address and create a password. Please note this **must** be the same email address to which the invitation was sent.

A screenshot of the "Create Account" form in the Lightning Docs Integration Hub. The form has a white background with a purple border. At the top, there is a purple lightning bolt icon and the text "Create Account". Below that, it says "Enter your email and choose a password to get started with the Lightning Docs Integration Hub." There are two input fields: "Email address*" and "Password*" with an eye icon. Below the fields is a purple button labeled "Continue". Below the button, it says "Already have an account? [Log in](#)". Below that is a horizontal line with "OR" in the center. At the bottom, there is a button labeled "Continue with Microsoft Enterprise" with the Microsoft logo on the left. At the very bottom of the form, there is a small purple lightning bolt icon.

3) Once sign in is complete, the below screen will appear. Choose “Accept”.

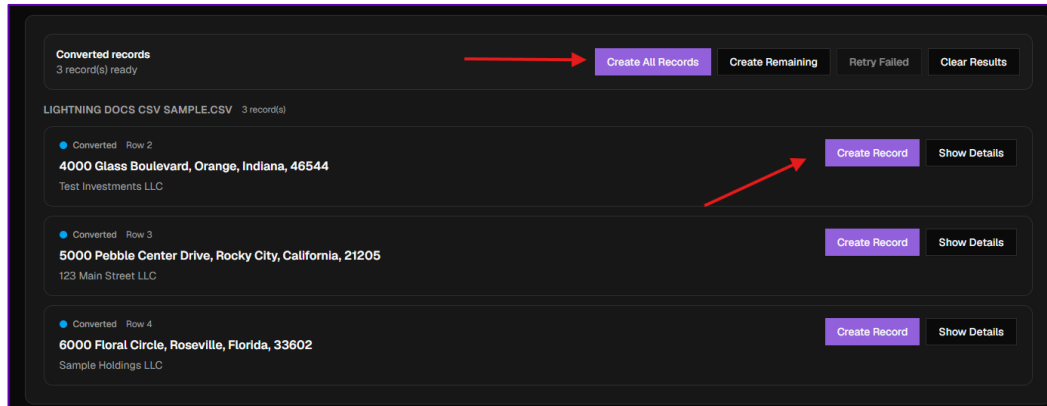


4) The user will arrive at the Lightning Docs Integration Hub homepage. Upload the exported data file by dragging and dropping it into the portal. The portal will allow the user to upload a single data file containing

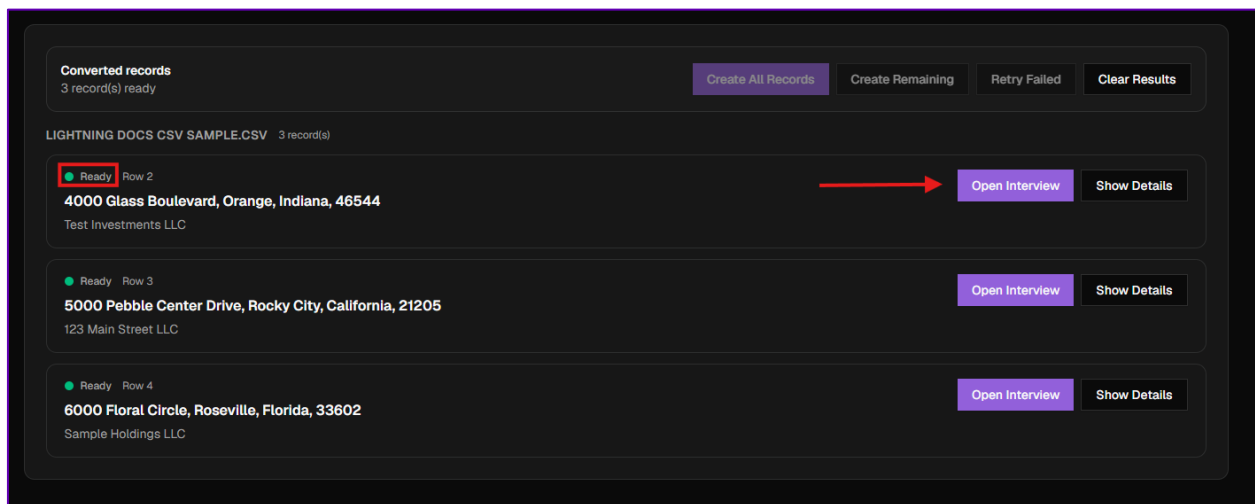


information for either a single loan transaction (all accepted file types) **OR** multiple loan transactions (excluding Excel spreadsheets).

- 5) Use the “**Create Record**” button to the right of the transaction to send a single record directly to Lightning Docs **OR** choose “**Create All Records**” to send multiple transactions at once when applicable.



When sending a single record to Lightning Docs, the user will be taken directly into the interview. When sending multiple records, each record may show in Lightning Docs as a “**New Work Item**” until opened. Each interview can also be opened directly from the Integration Hub by selecting “**Open Interview**”.



- 6) Once inside the Lightning Docs interview, review each page and complete any missing information as necessary. Proceed as normal and click “**Complete**” to download the loan document package.

For updates to your data file or requests to enable additional permissions, please contact the Support Team at support@lightningdocs.ai. If you encounter any issues with the portal, our team is also available to help. Do not hesitate to reach out!