ePrepare®

MAY 2025

Administrative Guide

FOR ACCOUNT ADMINISTRATORS

Discover how to navigate the ePrepare application, manage user accounts, and customize settings to streamline your organization's document workflow!

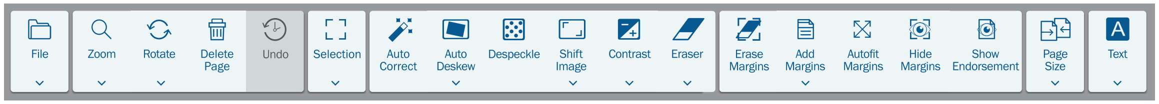
CSC offers electronic recording (eRecording) services for real estate documents, enabling clients to securely and efficiently record documents nationwide. As a pioneer in this space, we deliver both speed and reliability to support smooth real estate transactions.

Our intuitive, web-based platform reduces the time between closing and recordation, minimizes errors that lead to rejections, and enhances document tracking for greater operational efficiency.

To learn more about our comprehensive paper and electronic recording services with coast-to-coast coverage, please visit https://www.cscglobal.com/service/erecording.

We're ready to talk.

1 855 200 1150 csc-help@cscglobal.com cscglobal.com



Welcome to **ePrepare's Administrative Guide**! Here, you'll learn how to navigate the application, manage user accounts, customize global settings, and much more.

This guide provides an essential overview of our application, showing you how individual users tailor local settings to fit their workflows, while administrators can adjust global settings to affect all users within your account. We'll also highlight key features to help you effectively manage your administrative responsibilities.

Our Support Team offers interactive webinars where they demonstrate the eRecording process and answer any questions you may have. Training is complimentary for both you and your document preparers, so be sure to register for a session today!

For general users, we offer the ePrepare User Guide to help them get familiar with the application. Additionally, a variety of user guides are available, so be sure to check the last page of this guide for a list of helpful resources.

Questions? Contact our Support Team. **Ready to start?** The guide begins on the next page!

CONTENTS

[1] DISCLAIMER — You are solely responsible for the image content of your uploaded document, and CSC shall not be liable for any loss caused by your manipulation of any document image.

Our editing toolbar offers limited options for some counties in Ohio and New Hampshire, and all counties in California and Missouri. For more information, see page 9 of this guide.

For questions about possible legal ramifications resulting from manipulation of document images, consult with your in-house legal counsel or a qualified real estate attorney.

DOCUMENT SCANNING — BEST PRACTICES

- Prefer **letter-quality** (300 dpi) to retain detail with text and graphics.
- Use **letter** 8.5 × 11 or **legal** 8.5 × 11 **document presets**.
- Scan in **black and white** for the smallest file sizes.
- Text must be **legible** — typically 8–12 points in size.
- **Avoid presets that automatically detect page sizes**, as they are best suited for scanning photographs. When used with documents, this kind of preset often creates non-standard page sizes (*e.g.*, 8.14 × 10.56 in), a leading cause of document rejections.

Login to ePrepare

ePrepare is our web-based, electronic document recording solution that allows document submitters (including title companies, banks, and law firms) to electronically record real estate documents with county offices across the U.S.

We offer support for Chrome and Edge, but our website works with other modern browsers using Chromium at their core. If you or your team prefer using another browser, feel free to try your favorite!

FIGURE 1 | https://ep.erecording.com/

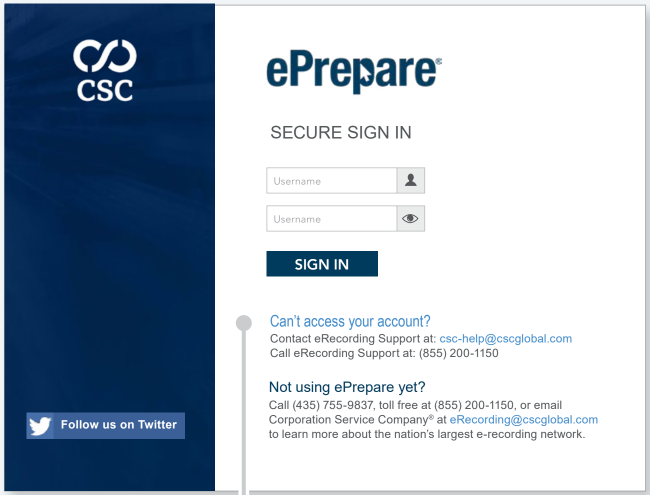


FIGURE 2 | ePrepare Internet Browser Compatibility

BROWSERS	SUPPORTED?	LINKS
Chrome	✔ Yes	Google
Edge	✔ Yes	Microsoft

For the safest and most optimal experience, we recommend using the latest version of Chrome or Edge. However, other modern browsers using Chromium at their core should also work.

General Browser Requirements:

- ✔ JavaScriptTM and cookies enabled
- ✔ Capable of 128-bit or better TLS encryption
- ✔ Popup blocker disabled

Multi-Factor Authentication

Multi-Factor Authentication (MFA) provides an added layer of security during the login process. Once this ePrepare setting is enabled, users receive a unique verification code via the email address listed in their user profile each time they log in. Users are prompted to enter this code to complete the login process.

This feature will be available as a user setting on May 15, 2025. You can choose to enable MFA individually, or your local eRecording administrator may require it for all users within your organization.

Users Can Self-Manage Password Resets

☑ **Click "Can't access your account?" to initiate a reset**
All users can initiate password resets by clicking this link found on the login page. To prevent access to this link, Administrators can disable the following setting found in the Security section: Global **Allow Password Reset**.

☑ **Users are prompted for their username and email**
Users are prompted to provide their username and email. Provided we find a match to what is stored in their user profile, they'll receive an email with a password reset token, valid for 24 hours.

☑ **One self-initiated password reset allowed in 24 hours**
Contact our Support Team for exceptions.

Password Requirements

- **Minimum of 9 characters**
- **At least 3 of the following:**
  - ✔ lowercase letters
  - ✔ uppercase letters
  - ✔ numbers
  - ✔ special characters
- **Not similar to your name**
- **Not similar to your username**
- **Not a recently-used password**
- **Not found in online searches**

How to Choose a Good Passphrase

- **Be creative**
  Olympic2028PaperMedals!
- **Replace spaces**
  Stop!Hammer$Time!
- **Use random words**
  Dolphin3Giraffe5Whale7
- **Use mixed metaphors**
  Golf-Interception!
  Robust!Confusion!
  #LowAnxietyModerateFear#
  FamilyWarMongering!!

What to Avoid

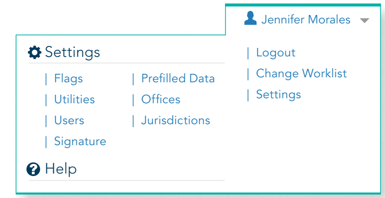
- **Avoid famous quotes**
  FourScoreAnd7Years
- **Avoid personal facts**
  EagleBoyScout1986
- **Avoid keyboard patterns**
  Qwerty12345678
- **Avoid oversimplification**
  MyPassword1sPassword
- **Avoid social media details**
  MyDogsName1sFluffy
  #SeeMeOnOneSpace

CONTINUED

Worklist View

Below is an example of a typical worklist, or your document library. Documents are sent to counties in virtual envelopes called packages, which are created and managed here. Sort your worklist by package status, package details, or by clicking on a column header.

There are other customization options — and shortcuts to additional pages — to help you manage your eRecording experience. Below are some key points for navigating the worklist, so take a moment and see what Worklist View offers you!

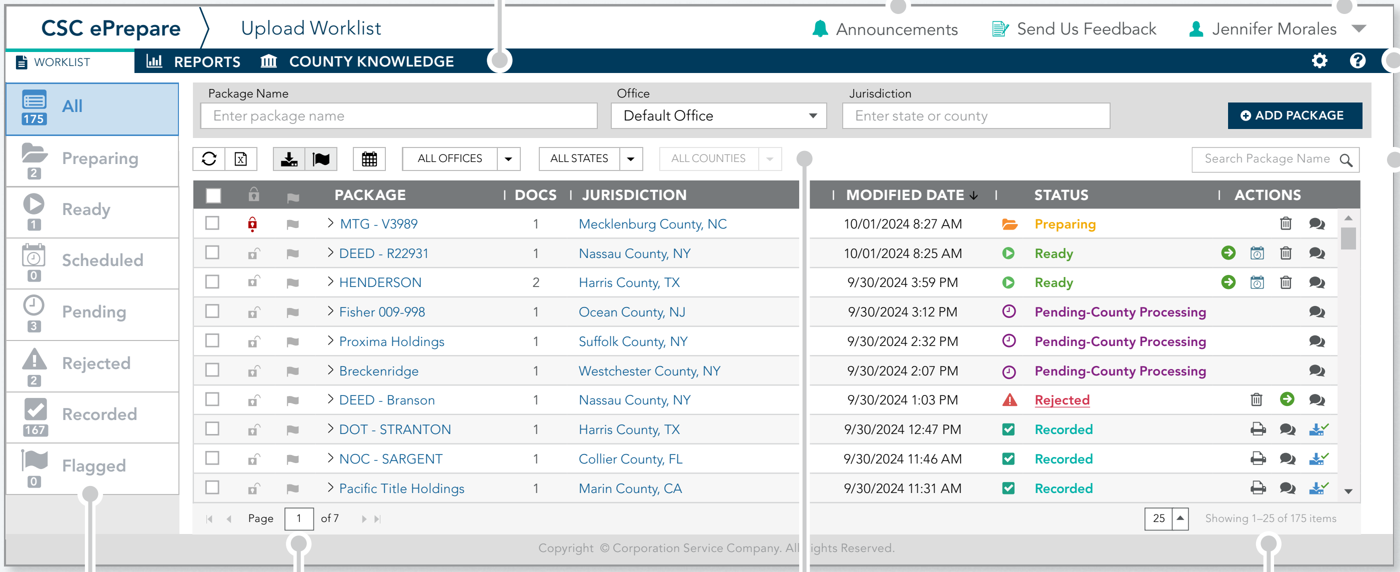


Shortcuts to popular features.

View application announcements using a variety of categories. See Announcement Preferences.

Menu of all features.

FIGURE 3 | ePrepare Worklist



Shortcuts to Settings and Help.

See Search for Packages.

Sort by package status.

Page navigation.

Sort by package details.

Items per page.

Helpful Document Tips

- ☑ A package should only contain related documents. If you have a reason to send them individually, send the first and wait for it to return as recorded before sending the next document in the series. Repeat with each document, one-at-a-time. Otherwise, there's a risk that documents may record out of order.
- ☑ Non-related documents should be sent to the county in separate packages. If sent together and one document is rejected, all documents are rejected, delaying their recording.
- ☑ Documents in a package record in order of their appearance, not by how they are named or numbered. If recording order is important, verify their arrangement

Unable to Find a Package?

An ePrepare setting called **Days to Wait Before Archiving Documents** (page 20) determines how many days recorded or rejected[1] packages appear on your worklist. The default is 30 days and it improves the responsiveness of very large worklists. If you can't find a package, it may lie outside of this visibility window. Try increasing the value of the setting, or search for the package name directly. If someone inadvertently deletes a package, contact us — we can restore it for you.

Related Setting

[1] **Archive Rejected Packages?** is a global setting that determines whether rejected packages also adhere to the archive setting. Only administrators can manage global

CONTINUED

Worklist Contents

Below is an example of a typical worklist, or your document library. Documents are sent to counties in virtual envelopes called packages, which are created and managed here. Sort your worklist by package status or details, and click on a column header to use it as a sort filter.

There are other customization options — and shortcuts to additional pages — to help you manage your eRecording experience. Below are some key points for navigating the worklist, so take a moment and see what Worklist View offers you and your eRecording team!

FIGURE 4 | Typical Scan/Upload Worklist

Column headers can be used as sort ↓↑ filters.

Package lock status.

Click to open package.

Click to open County Knowledge.

See our guide: Package Statuses.

PACKAGE ACTION ICONS

Below are some common package actions:

- Send Package *or* Prepare for Resubmission
- Delete Package
- Schedule Package
- Get Help from CSC

How Does a Package Become Locked?

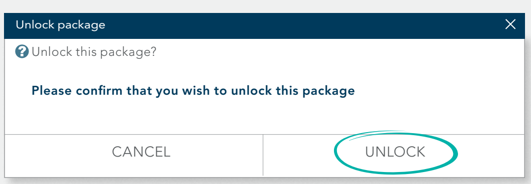
Packages lock when a user opens a document in the package. To see who locked it, hover your mouse cursor over the lock icon:

- Unlocked
- Locked by you
- Locked by another user

In addition, if a user closes their browser while the document is open, this is known as a "forced lockout" and the package remains locked until one of the following occurs:

How To Unlock a Package Locked By Me?

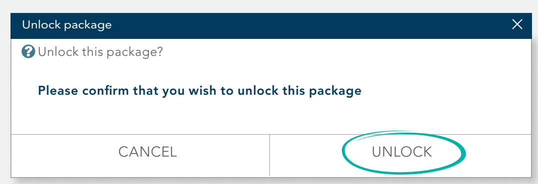
- If the package is open, close all open documents, or —
- From the worklist, click the green lock icon and then click UNLOCK from the dialog box:



OR

How To Unlock a Package Locked By Someone Else?

Administrators can unlock packages locked by anyone else. From the worklist, click on the red lock icon and then click UNLOCK from the dialog box:



CONTINUED

Package View

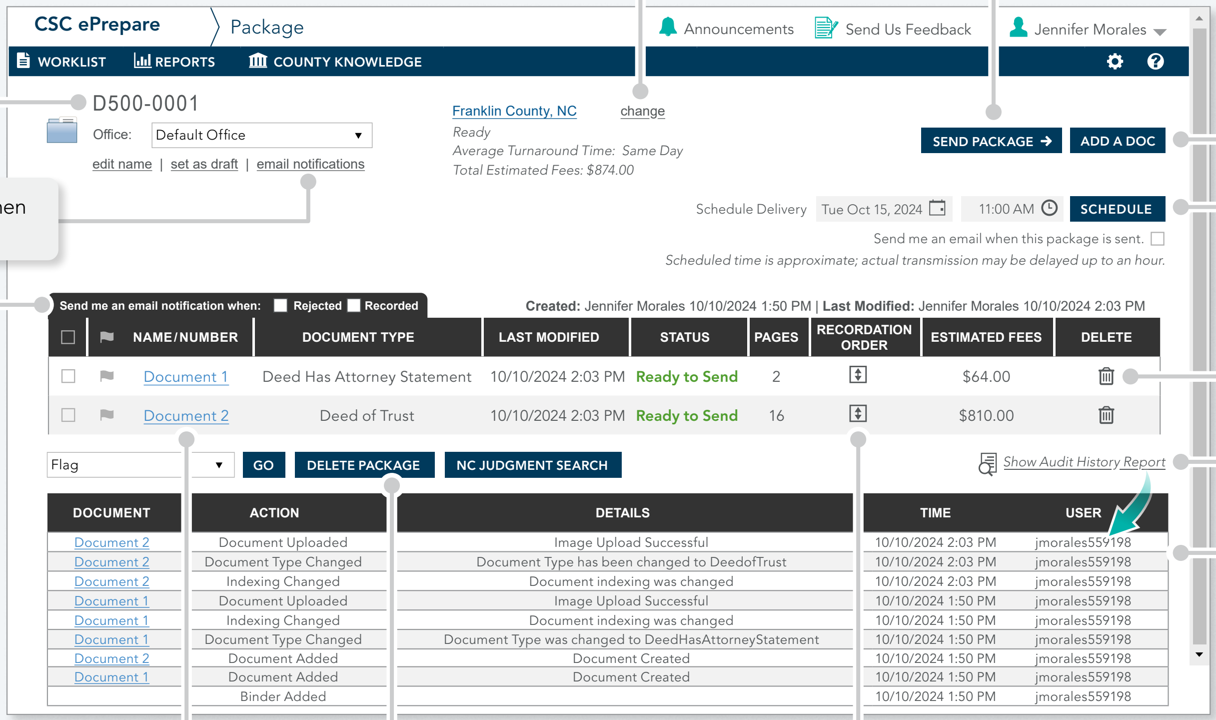
To open a package from your worklist, click on the package's name. Package View appears (below) and displays the package contents. The fees shown here are our estimates, based on the document type, number of pages in each document, and completed indexing.

If the estimate is significantly different than your expectations, first double-check the documents and your indexing. If you are unable to resolve the discrepancy, call or chat with our Support Team before you send the package. Below are some highlights of Package View:

If the package has not yet been sent, you can change its destination county by clicking here.

If all documents are **Ready to Send**, click this button to send it.

FIGURE 5 | Package View



Package name.

Specify who is notified when the package returns.

Add a document to the package.

See our Scheduled Send guide.

Delete a document.

Click to see Audit History Report.

The Audit History Report shows a timeline for each document and any rejections previously received.

Click a document name to open it and make changes.

Delete the package.

Documents record in the order they appear. To change recordation order, **click** + **drag** a document's order icon up or down in the list.

ePrepare can notify you when a package returns and you can automate this feature using the Notifications options found on your Settings page.

CONTINUED

Creating New Packages

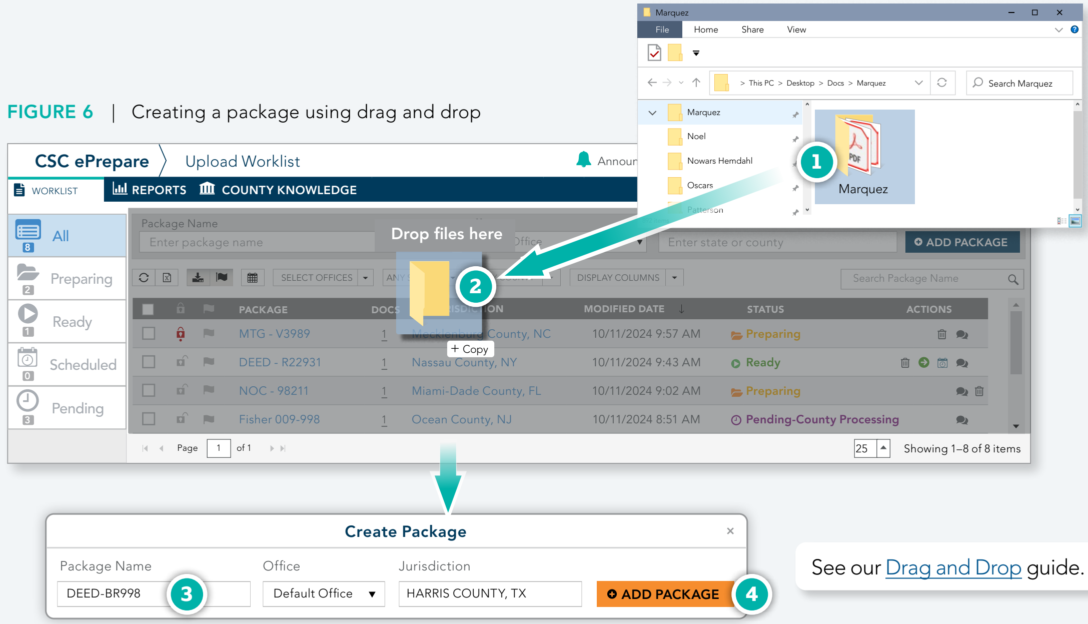
Drag and drop a document (or a folder of related documents) onto your worklist. This is the preferred method, and offers the fastest results when using ePrepare's ability to predict document-types:

Method #1 — Drag and Drop a Document or Document Folder

All documents must be in .PDF or .TIF format.

1. From File Explorer, drag and drop a single document or a folder of related documents …
2. … onto your main worklist area …
3. From the *Create Package* dialog, enter the package name, choose an optional office, and enter a valid county …
4. Click **ADD PACKAGE** .

FIGURE 6 | Creating a package using drag and drop



See our Drag and Drop guide.

— OR —

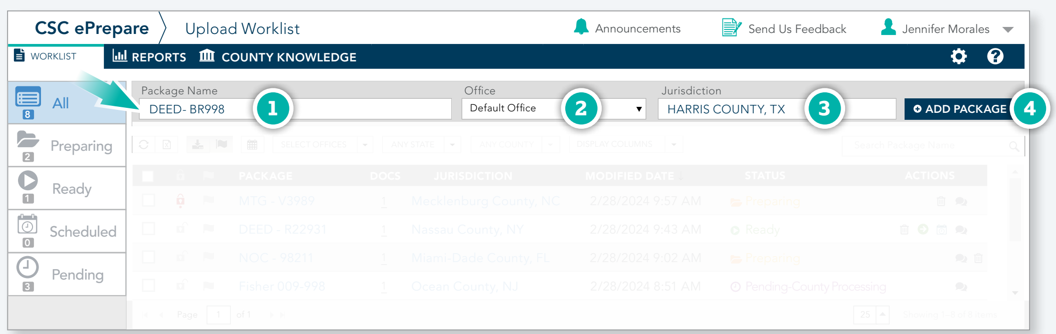
METHOD #2 — Manually Enter Package Name and Destination

All documents must be in .PDF or .TIF format.

You may also enter the package name and destination directly onto the worklist, but this method for creating packages is a little slower when used with ePrepare's ability to predict document-types:

1. Enter a package name …
2. Enter an optional office …
3. Enter an valid county …
4. Click **ADD PACKAGE** .

FIGURE 7 | Creating a package entering the package name and county



Document View

Document View is where documents are prepared for submission. This is where you upload, edit, or replace document images. And it is where helper documents are added and indexing is done. It appears when you click on a document name to open it. Below are some highlights:

Indexing Panel
Upload documents, index data.

Page Thumbnails
Click a thumbnail to preview.

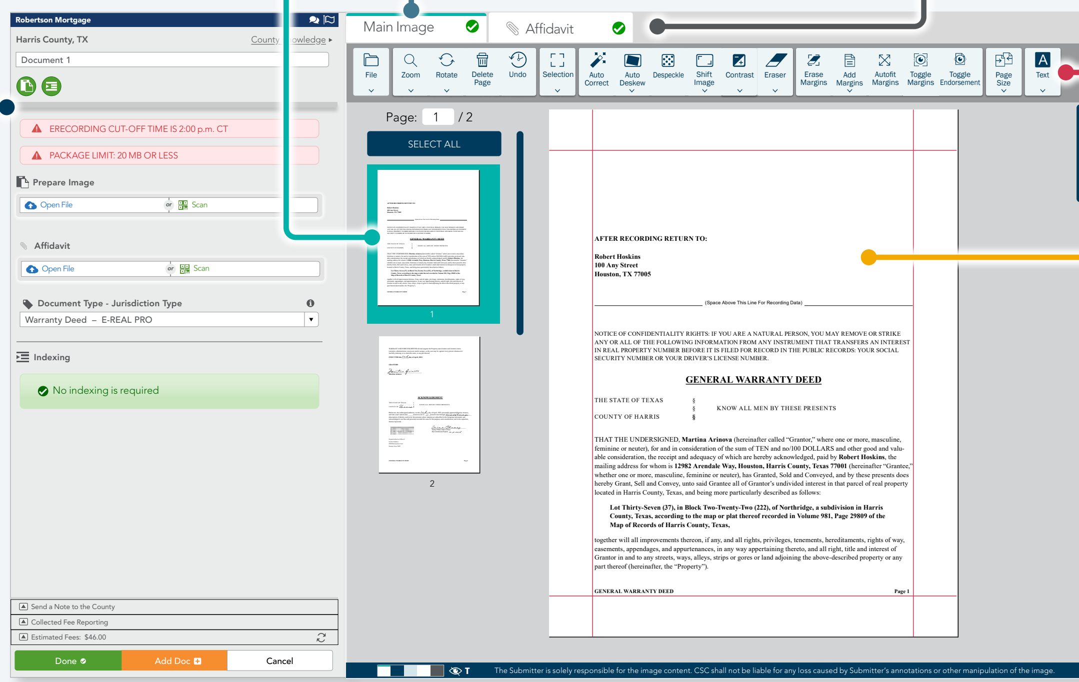
Main Document
The primary document tab.

Attachments (optional)
Helper docs appear in tabs.

Document Toolbar
Tools for document preparation.

Page Preview
The selected page appears here.

FIGURE 8 | Doc View



Document Preparation Includes Several Steps

- **Optimization** — removal of scanning artifacts and image enhancement. A few counties do not permit this and insist that uploaded images match their paper counterparts exactly. In these situations, the document toolbar may offer limited functionality.
- **Managing Helper Documents** — required attachments like tax forms, cover pages, *etc.*
- **Indexing** — Some counties require indexing of party names, consideration or loan amounts, document references, *etc.* This data may be used to calculate recording fees and to facilitate public searches for land records on county websites. Recording fees are often calculated on indexed information, so be accurate!

CONTINUED

Document Editing Toolbar

Our document editing toolbar is automatically available in any internet browser, and it appears during document preparation. Some buttons expand to display additional options, and a widget at the bottom of the document preparation window offers several color variations, including icon- and text-only versions. A small number of counties do not permit changes to uploaded documents, including image enhancements — so in these situations, the toolbar may offer limited functionality. We offer additional information below:

FIGURE 9 | The default document editing toolbar

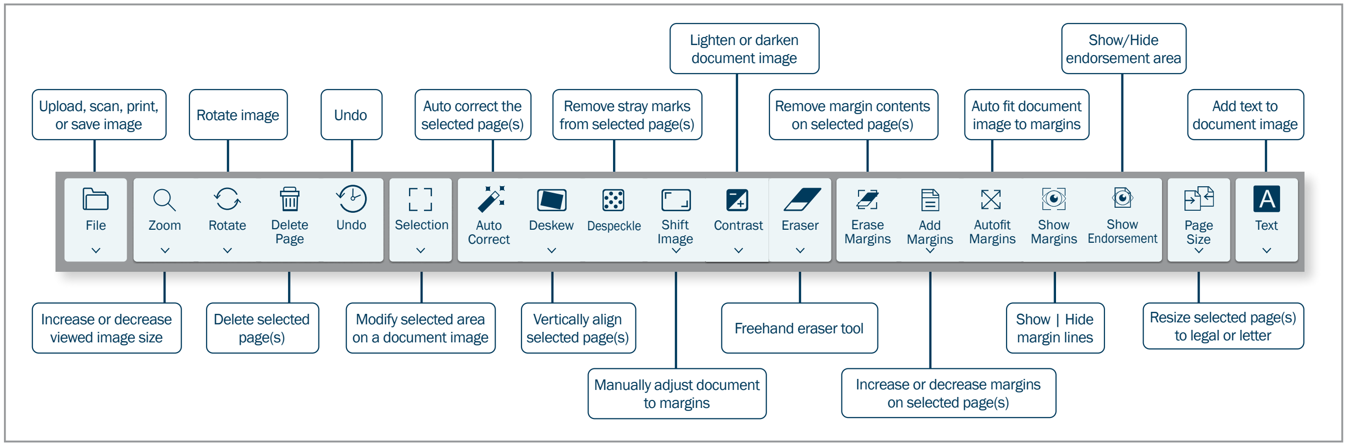
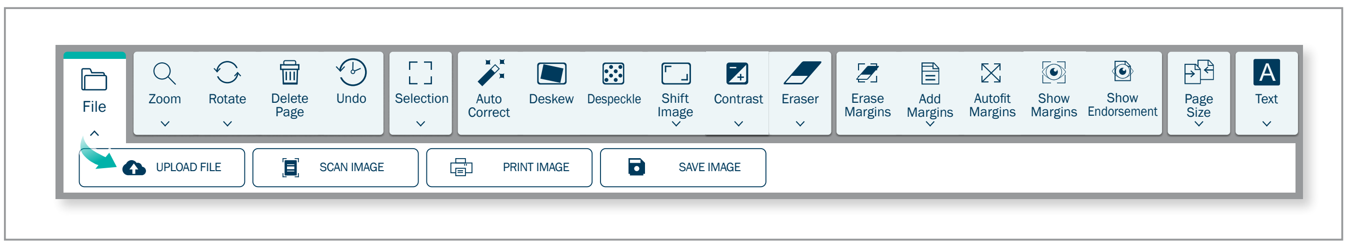


FIGURE 10 | Some toolbar buttons expand to offer applicable options



Important Notice About Manipulating Scanned Document Images

Some counties have expressed concerns about the potential use of editing tools to modify scanned documents improperly. They emphasize that eRecording submissions should exactly match the paper originals in every detail.

As an eRecording vendor, CSC understands that county recorders are the final authority in determining what is acceptable for recording. In response to these concerns, we have proactively disabled certain editing toolbar functionalities for some counties in Ohio and New Hampshire, as well as for all counties in California and Missouri.

When submitting documents to these counties, CSC kindly requests that our customers refrain from using their own tools to alter scanned document images. Counties reserve the right to temporarily or permanently suspend your organization's ability to submit documents if they suspect any violations.

For guidance on the legal implications of modifying scanned images, please consult with your in-house legal team

Affected Counties

05/15/2025 – Subject to Change

- **California**
  All Counties
- **Missouri**
  All Counties
- **New Hampshire**
  Rockingham County
- **Ohio**
  Defiance County
  Fulton County
  Henry County
  Mercer County
  Paulding County
  Williams County
  Wyandot County

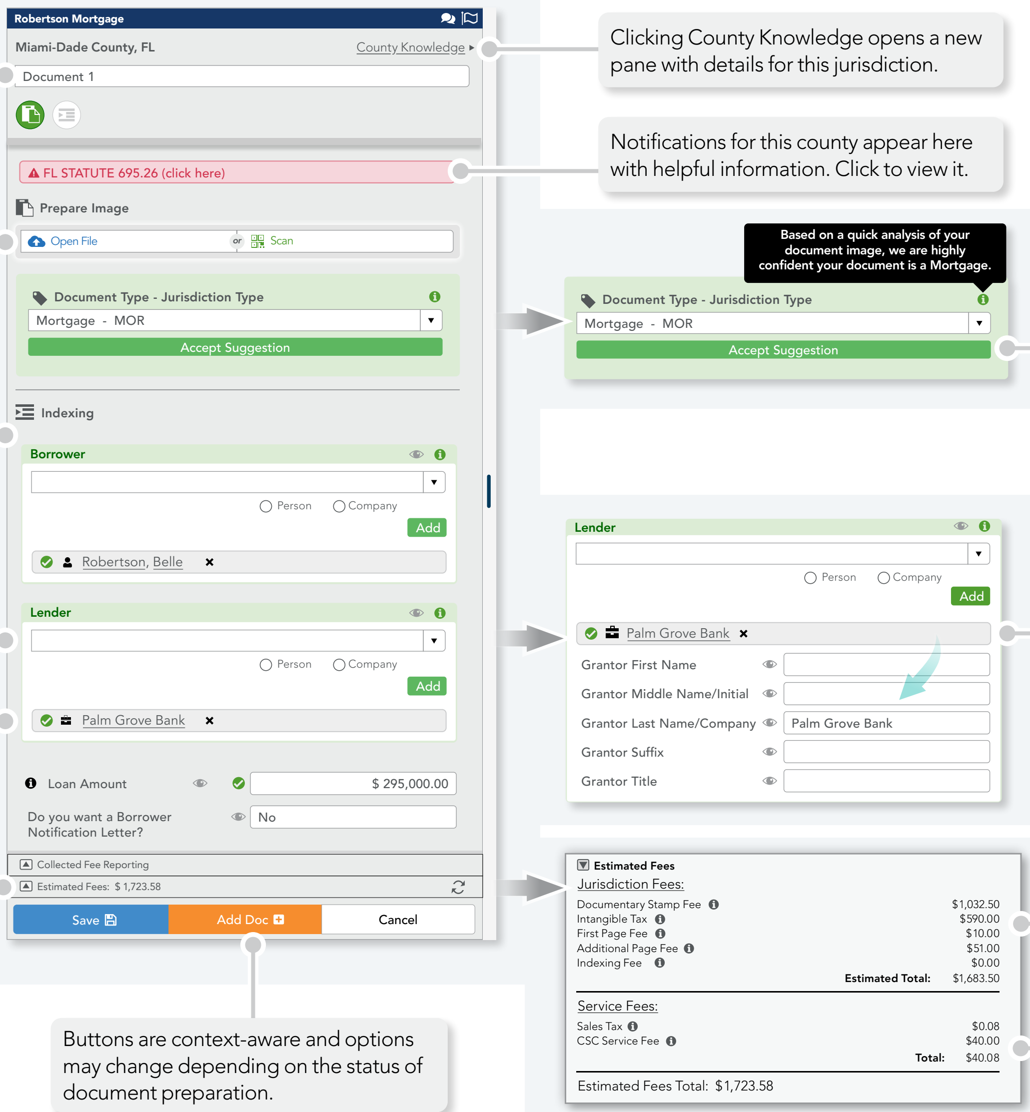
CONTINUED

Indexing Documents

Indexing requirements are determined by the county or their software provider. The data may be posted on the county's website to facilitate online searches for recorded documents.

The contents of the indexing panel may change, depending on the selected document-type and how you respond to some questions, and a general example is shown below:

FIGURE 11 | Indexing



You can accept default document names or change them for your convenience, but counties do not see this information.

Upload a document image saved to your computer or scan one directly. If you are replacing an existing image, options are:

- Overwrite exisiting image
- Insert at beginning
- Insert at current page
- Add to end

Additional options may appear if you or your organization has added optional Customer Reference Fields.

Enter one name at a time or choose one from the drop-down list, then click **Add**.

This name has been added to indexing. To remove it, click the ✖ icon.

Counties may use your document type and indexing when calculating recording fees and taxes for this document.

Buttons are context-aware and options may change depending on the status of document preparation.

Clicking County Knowledge opens a new pane with details for this jurisdiction.

Notifications for this county appear here with helpful information. Click to view it.

ePrepare can suggest a document-type based on content, but your administrator can disable this feature, if desired.

Click on a name to expand its component name fields. Any changes will be updated when the document is saved.

Click the icon and a pop-up appears showing a fee breakdown. If our estimates significantly differ from your expectations, first verify your indexing for errors. If none are found, contact us before sending the package to the county. Our estimates are typically quite accurate.

Service Fees apply but your administrator controls whether they are viewable.

CONTINUED

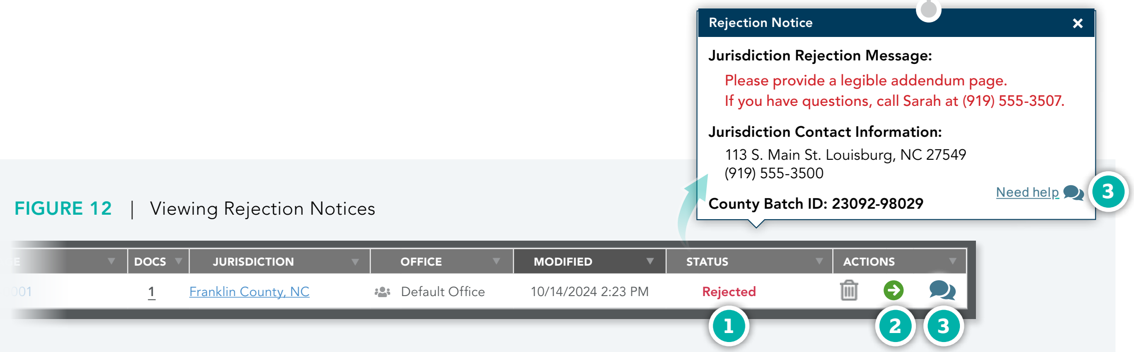
Handling Rejection

Rejections occur for a variety of reasons. Typically, an explanation is included when the package is returned to you. Once you understand the reason for the rejection, prepare the package for resubmission, make any needed corrections, and then successfully resubmit it.

1. Locate the rejected package on your worklist and click the status **Rejected** to view the rejection message …
2. Click the **Prepare for Resubmission** icon. The package opens, allowing you an opportunity to make corrections before resubmitting the package …
3. Or click the **Chat** icon to ask us for assistance. Choose from one of the three options illustrated below.

The rejection notice shows the reason and the county contact information.

FIGURE 12 | Viewing Rejection Notices



Requesting Help From CSC

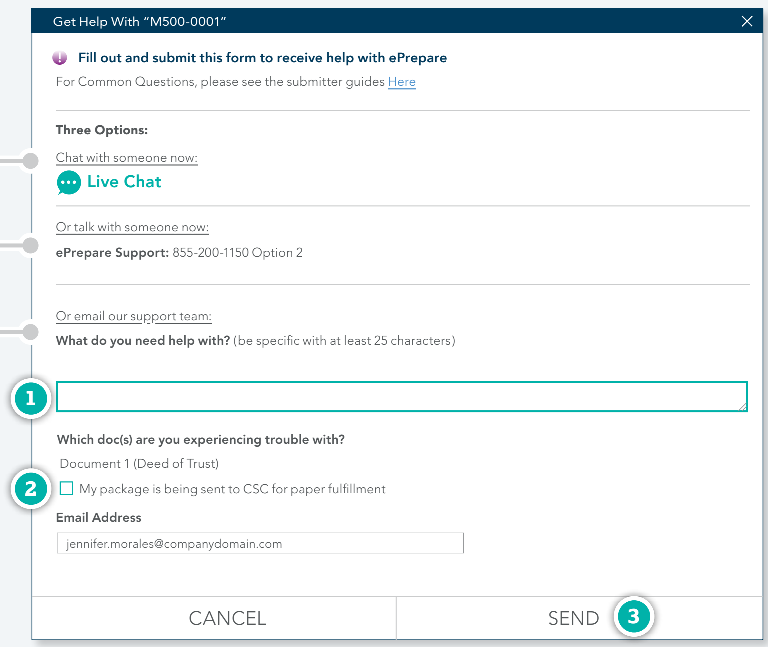
If you want our assistance, there are three available options:

Chat with a member of our Support Team. Your administrator can disable this option if your organization does not allow chat communications.

For urgent matters, please call us.

Email your question and we'll reply as soon as possible — usually within 10–60 minutes during business hours.

FIGURE 13 | Getting Help with Rejections



1. If you choose the **email option** for assistance, please let us know what you need help with …
2. If you are sending the package to CSC for paper fulfillment be sure to check the appropriate box …
3. To send us your email request, click **SEND**.

CONTINUED

County Knowledge

ePrepare offers a county knowledge page offering information about each available county in our eRecording network. You may search by county name or by state abbreviation, as illustrated below:

Searching by County Name

1. From the shortcuts bar, click **COUNTY KNOWLEDGE** …
2. Begin typing a county name. For this example, we'll type "wak" …
3. Select a county from the matching pop-up list.

or

Searching by State Abbreviation

1. From the shortcuts bar, click **COUNTY KNOWLEDGE** …
2. Type a comma, a space, and a valid state abbreviation. For this example, we'll type ", NC" and then wait for a moment for the search matches to appear …
3. Select a county from the matching pop-up list.

FIGURE 14 | Searching County Knowledge by County

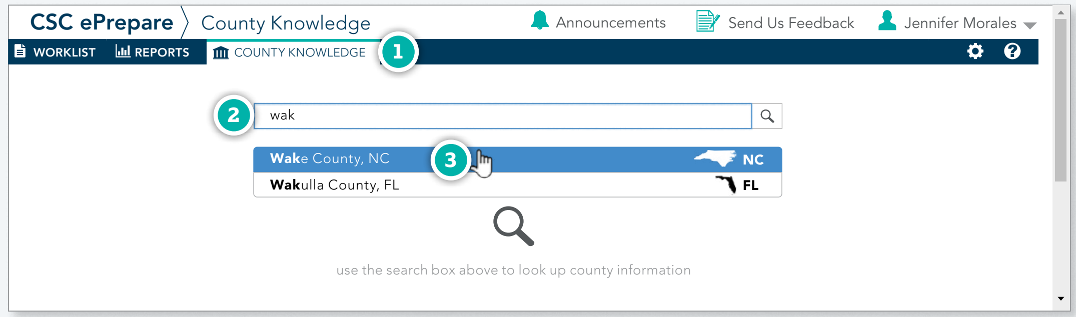
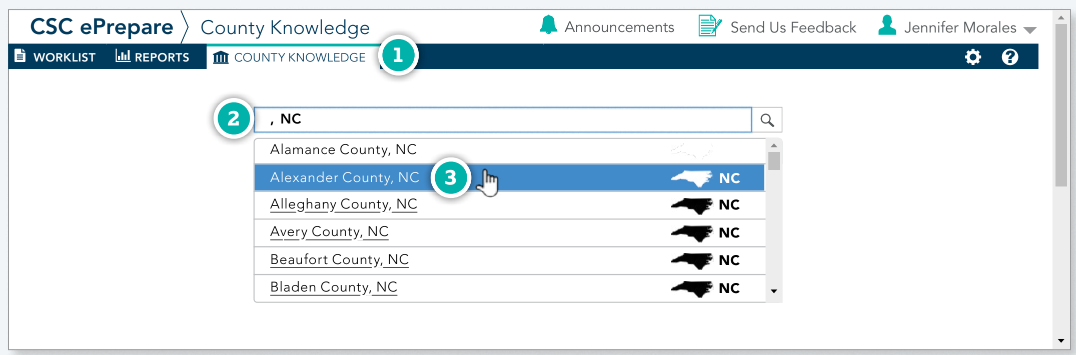


FIGURE 15 | Searching County Knowledge by State



SEARCH RESULT

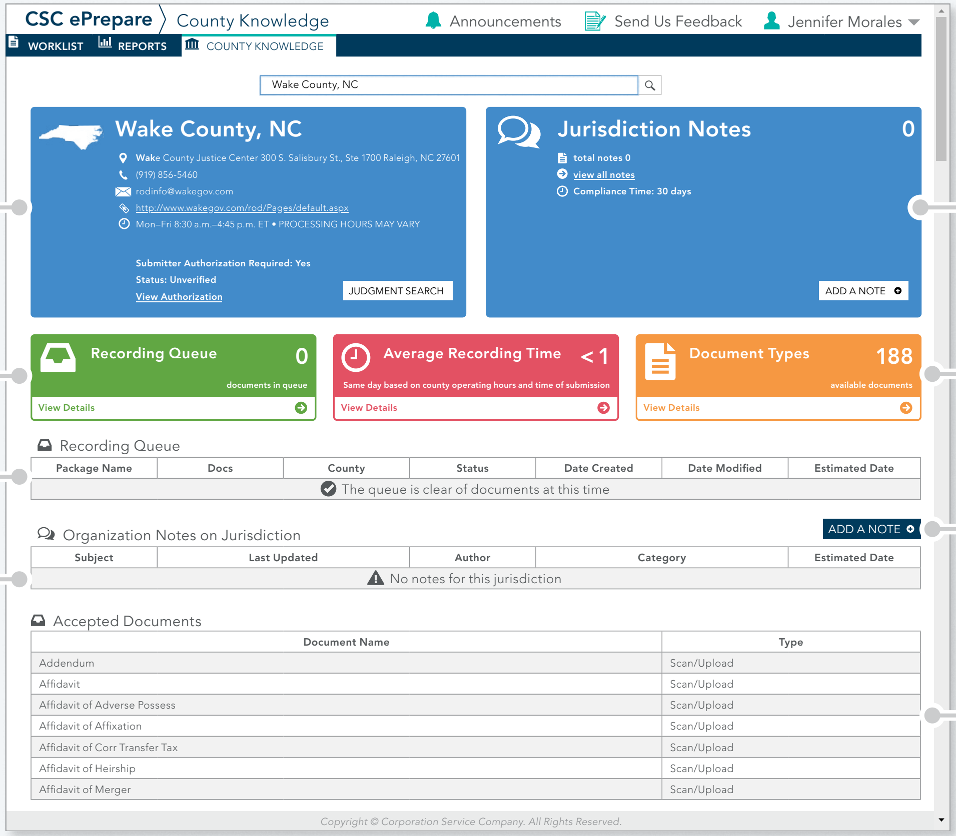
An example appears on the next page.

CONTINUED

Example

Here is an example of a search result.

FIGURE 16 | Wake County NC example



View county contact information and if pre-authorization is required for submissions.

See pending packages for your organization and the recent average recording time.

View your organization's pending packages for this specific county, if any.

View notes created by your organization.

See if your organization created any notes for this county and view compliance time.

View the number of document-types available for this county.

Add a new note for this county.

View a list of available document-types.

CONTINUED

Managing User Accounts

User profiles are created and managed from ePrepare's Users page. To open this page, follow the illustrated steps below:

Who Can Manage User Profiles?

Any user assigned the **Organization Admin** or **Access Admin** user role.

1. Login to ePrepare. In the upper-right corner, hover the mouse cursor over your name …
2. When the user menu appears, click **Users** or **User Info** …
3. For security purposes, enter your ePrepare login password when prompted …
4. Click AUTHENTICATE …

Administrator Accounts are Protected

Each eRecording account must have at least one administrator profile. If your eRecording account has only one administrator, you cannot delete it without first creating a secondary administrator profile to take its place.

To delete an administrator profile, click on the user's name to open the profile, remove the **Admin** and **Notary** roles, then save the changes. You can then delete the profile by clicking the new delete ✕ icon.

FIGURE 17 | Opening the Users Page

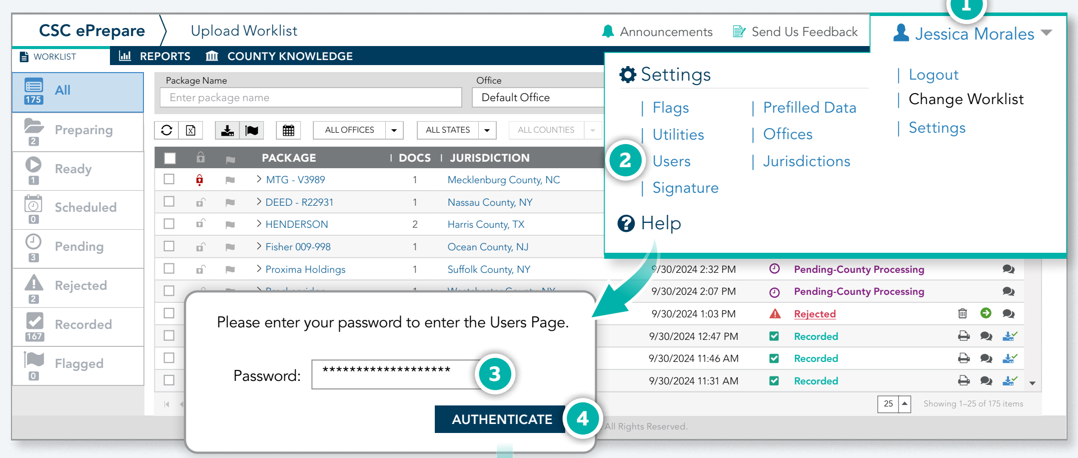
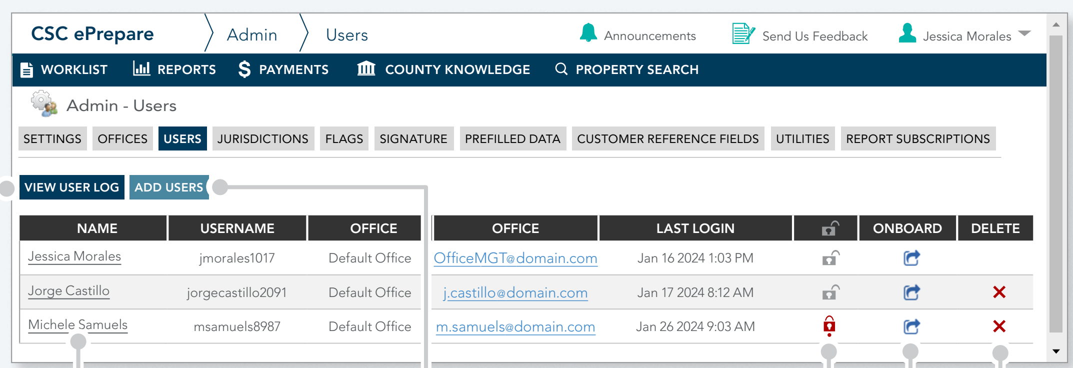


FIGURE 18 | User Profiles Page



Click a name to open their profile.

Click to add a new profile.

Click to lock / unlock.

Click ✕ delete it.

Click to view the user log, which displays a helpful summary for each user profile.

Click [icon] to email them their username and a password reset token, valid for 24 hours.

CONTINUED

Viewing User Log

The User Log displays helpful statistics for all of your user profiles, such as lock status, last login and password change, and assigned roles.

To See How to Open This Page —

Review page 14 of this guide.

1. From the *Users* page, click VIEW USER LOG …

The User Log Shows Helpful Information

The User Log displays helpful statistics for each user and the table can be exported to Excel format. You may find it useful when comparing roles for unintentional discrepancies. For example, both Jorge and Michele are supposed to have identical roles, but Michele is missing the **Send** role.

2. Click the 💾 download icon to export the table to Excel.

FIGURE 19 | User Profiles Page

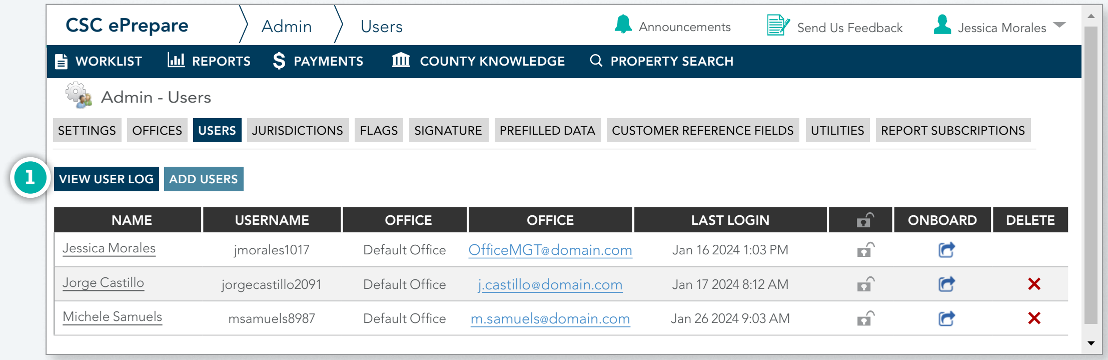
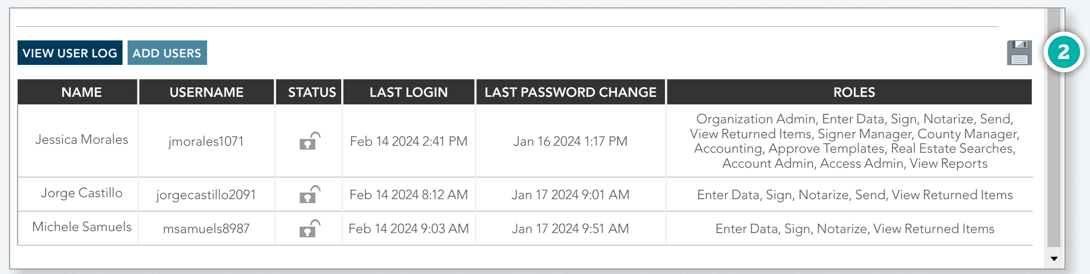


FIGURE 20 | The User Log



CONTINUED

Adding User Accounts

The following steps illustrate how to add user profiles to your account:

To See How to Open This Page —

Review page 14 of this guide.

Choose Complex Usernames

Usernames must be unique and complex variations are more secure. For instance, if Andy's employee number is 4021, use a complex variation like **asargeant4021**. Avoid simple variations like **asargeant**.

1. From the *Users* page click ADD USERS …
2. When the *Add a User* dialog appears, enter a username, and the user's first name, last name, and email address …
3. Assign an optional office, if you use this feature …
4. Optionally, add the user's title and address information …
5. Select at least one role (if you select **Organization Admin**, then all roles will be selected for you) …
6. To create the profile and onboard it, click **ADD USER**.

Onboarding is Automatic

ePrepare will automatically email new users with their username and a link to create their login password, valid for 24 hours, as shown in Figure 23.

If the user's password link expires before they are able to just open the Users Page and click the user's Onboard icon to send them a new onboarding email, valid for another 24 hours.

Onboarding emails do not invalidate current passwords nor force a user to action — users are free to ignore this email.

FIGURE 21 | User Profiles Page

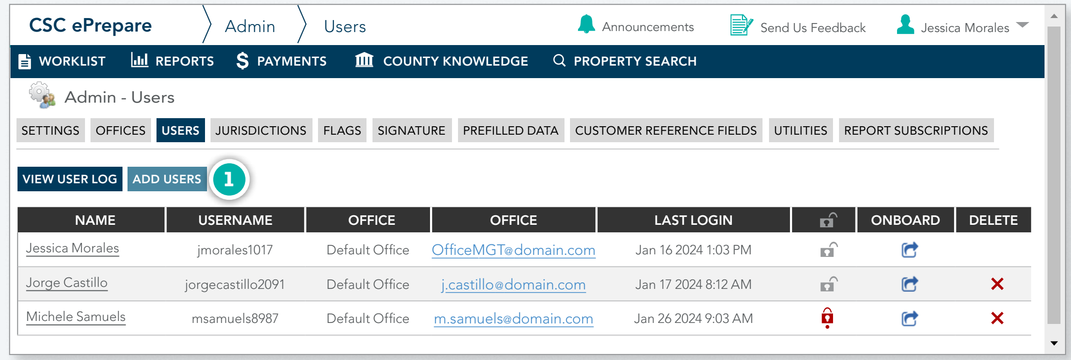


FIGURE 22 | Adding a User

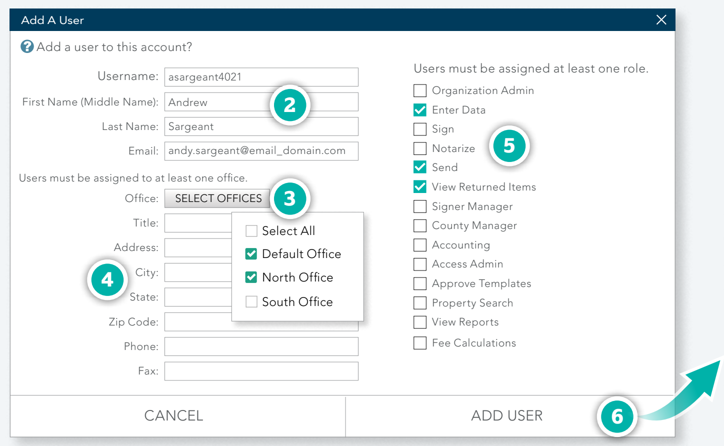
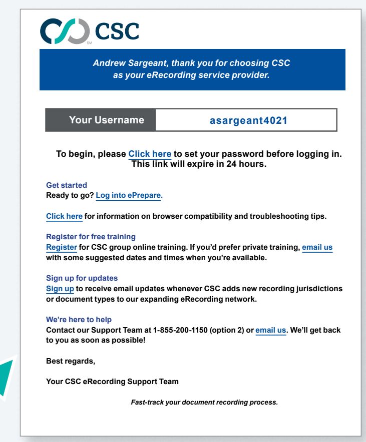


FIGURE 23 | Onboard Email Example



User Roles

Each user profile must have at least one role associated with the profile. Roles define the abilities of each user. Assign as many roles as needed and ignore any that do not apply to your workflow or organization.

FIGURE 23 | ePrepare's User Roles

User Role	Description	Notes
Organization Admin	Automatically selects all roles.	The **Sign** and **Notarize** roles appear but must be manually selected, if they are needed.
Enter Data	Permits indexing data for documents.	Counties often use this data to calculate recording fees, applicable transfer or stamp taxes, *etc.*
Sign	Permits digitally signing applicable documents.	Requires a CSC digital signature file. For more information, see Digitized Signature Form.
Notarize	Permits digitally notarizing applicable documents.	Requires a CSC digital signature file. For more information, see Digitized Signature Form.
Send	Permits sending packages to a county.	Sending a package implies your organization's consent to pay any recording fees and applicable taxes.
View Returned Items	Permits viewing returned packages.	This includes both rejected and recorded documents.
Signer Manager	Permits managing digital document signers and notaries.	
County Manager	Permits viewing ePrepare's Jurisdictions page .	For more information, see Managing Jurisdictions and CSC County Authorization Guide.
Accounting	Permits access to your CSC eRecording financial reports.	Click the **Reports** virtual tab found on the shortcuts bar to view a list of available reports.
Access Admin	Permits managing user profiles for your organization.	For more information, see this guide.
Approve Templates	Permits approving L3 templates for your organization.	This feature applies to submitters who prepare virtual document images rendered from data sources.
Property Search	Permits real estate searches for your organization.	This is a fee-based service. For more information, see Property Search.
View Reports	Permits viewing available reports for your organization.	Click the **Reports** virtual tab found on the shortcuts bar to view a list of available reports.
Fee Calculations	Permits access to a county fee calculator service.	This is a fee-based service. For more information, see Calculator.

CONTINUED

Locking | Unlocking User Profiles

Administrators can lock any user profile, preventing the user access to ePrepare. For additional information, review the material below:

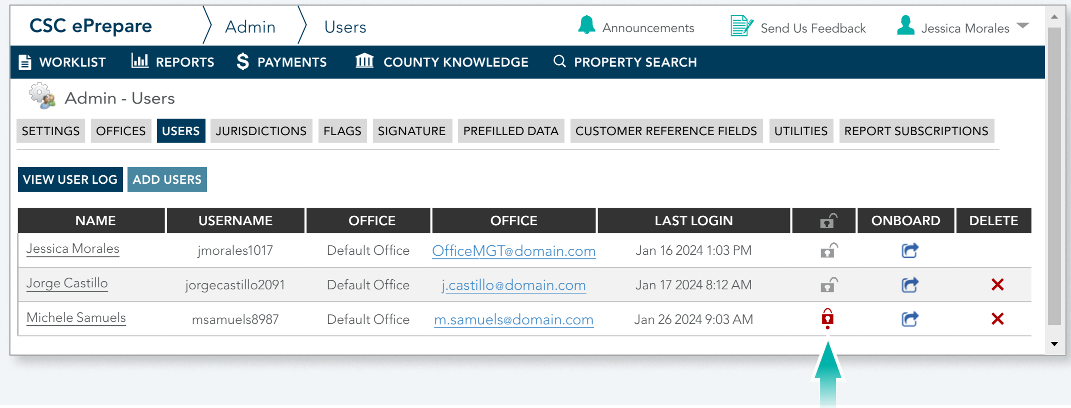
Locking User Profiles

From ePrepare's *Users* page, administrators can lock a user profile by clicking the profile's lock icon, changing it from to .

WHEN TO LOCK • Consider locking user profiles for short-term absences such as maternity or short-term medical leave and notify the user.

WHEN TO DELETE • Consider deleting profiles that are no longer used.

FIGURE 24 | Opening the Users Page



Unlocking User Profiles

From ePrepare's *Users* page, unlock a user profile by clicking the profile's lock icon, changing it from to .

If you encounter problems, contact our Support Team at 1-855-200-1150 x2 or email csc-help@cscglobal.com. To expedite your request, be prepared to provide us with:

- Your ePrepare account name
- Your administrator username
- The username of the account to be unlocked

When emailing us, please use the email account found in your user profile.

Profiles Lock Automatically After 6 Failed Login Attempts

- User profiles become locked after six consecutive unsuccessful login attempts, and then must be manually unlocked by an administrator.
- Locked accounts cannot be unlocked by the user resetting their login password, nor by an administrator sending a password reset token via an Onboarding email.
- To thwart possible attempts by third parties phishing for account names or passwords, our website discloses minimal information for failed login attempts, whenever feasible.

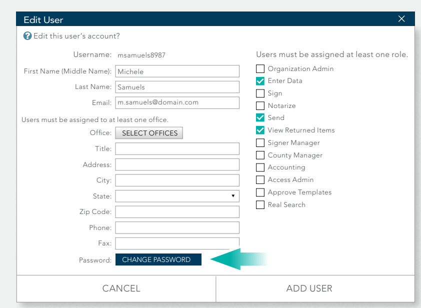
Administrators Can Request or Force Password Changes

Requesting Password Changes

Open the user's profile and click CHANGE PASSWORD. An email is sent to the user with a password reset token, valid for 24 hours. This does not invalidate the current password so users are free to ignore these requests.

Forcing Password Changes

Password changes can be forced but only at specified intervals. On your *Settings* page, scroll to the *Security* section and find "Password Expiration" (select 30, 45, or 90 days — see page 21).



User Settings

Each user customizes ePrepare through application settings. To open this page, follow the steps below:

User settings are local policies and affect only each individual user.

Figure 26 shows what a non-administrator sees for available settings.

1. Click the **Settings** icon in the upper-right corner …
2. Use the scrollbar or the mouse wheel (if available) to scroll up or down the settings list …
3. If a section is collapsed and the contents are not visible, click the divider bar to expand its contents …
4. To confirm any changes, click SAVE CHANGES.

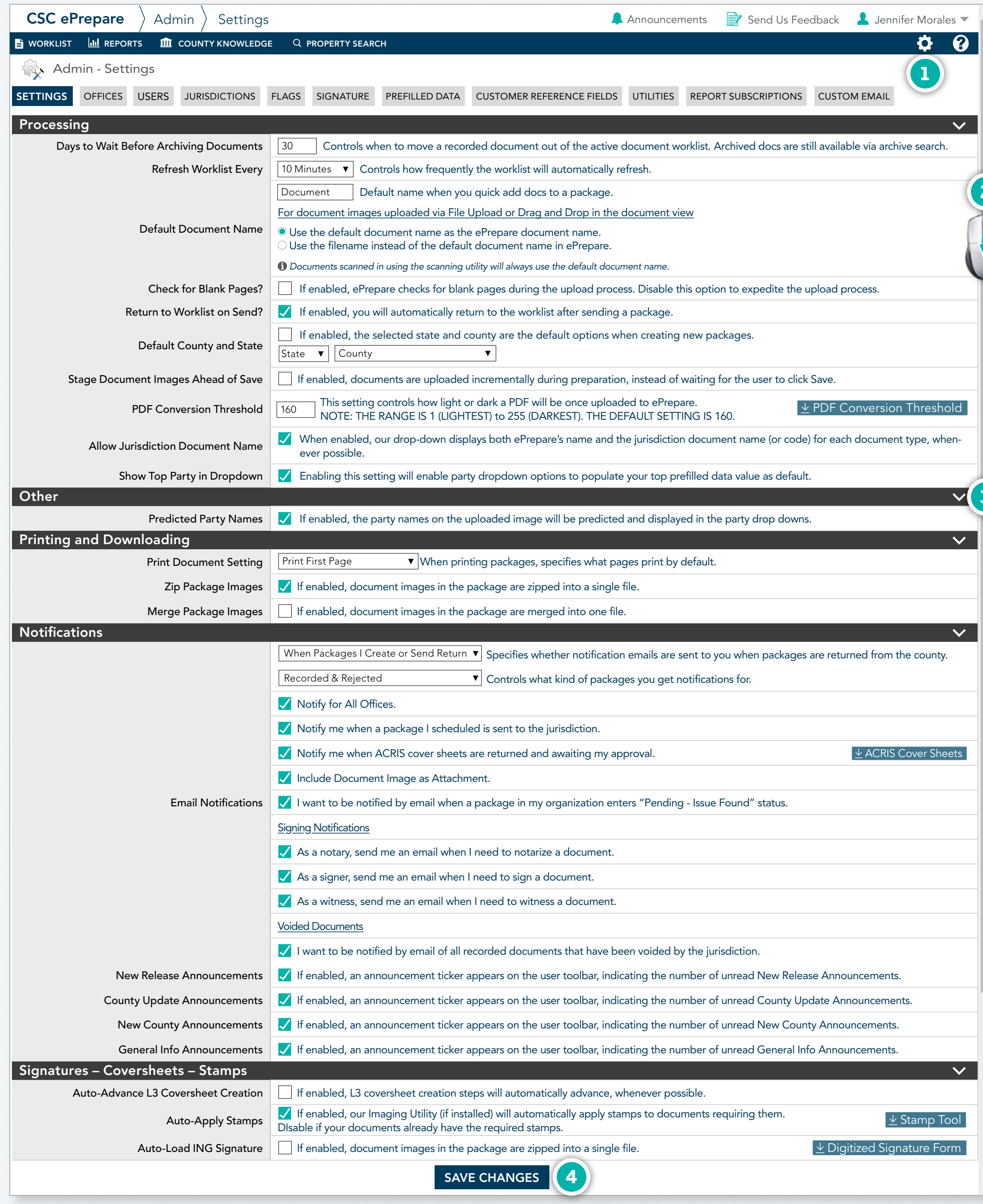
User Settings

These are local policies and affect only the individual user.

Settings Are Subject To Change

While we make every effort to keep this guide up-to-date, available settings are subject to change. Settings may also vary, depending on the specific configurations and requested features applied to your account.

FIGURE 25 | ePrepare User Settings



CONTINUED

Global Settings

Administrators also customize ePrepare through application settings. To open this page, follow the illustrated steps below.

Administrators have their own user settings, which are local policies that affect only the individual administrator.

Administrators also see **Global** settings, which are global policies that affect all users on the account, including other administrators.

Figure 27 shows what an administrator sees for available settings.

1. Click the **Settings** icon in the upper-right corner …
2. Use the scrollbar or the mouse wheel (if available) to scroll up or down the settings list …
3. If a section is collapsed and the contents are not visible, click the divider bar to expand its contents …
4. To confirm any changes, click **SAVE CHANGES**.

User Settings

Account administrators have the same user settings as everyone else. These are considered local policies that affect only the individual user.

Global Settings

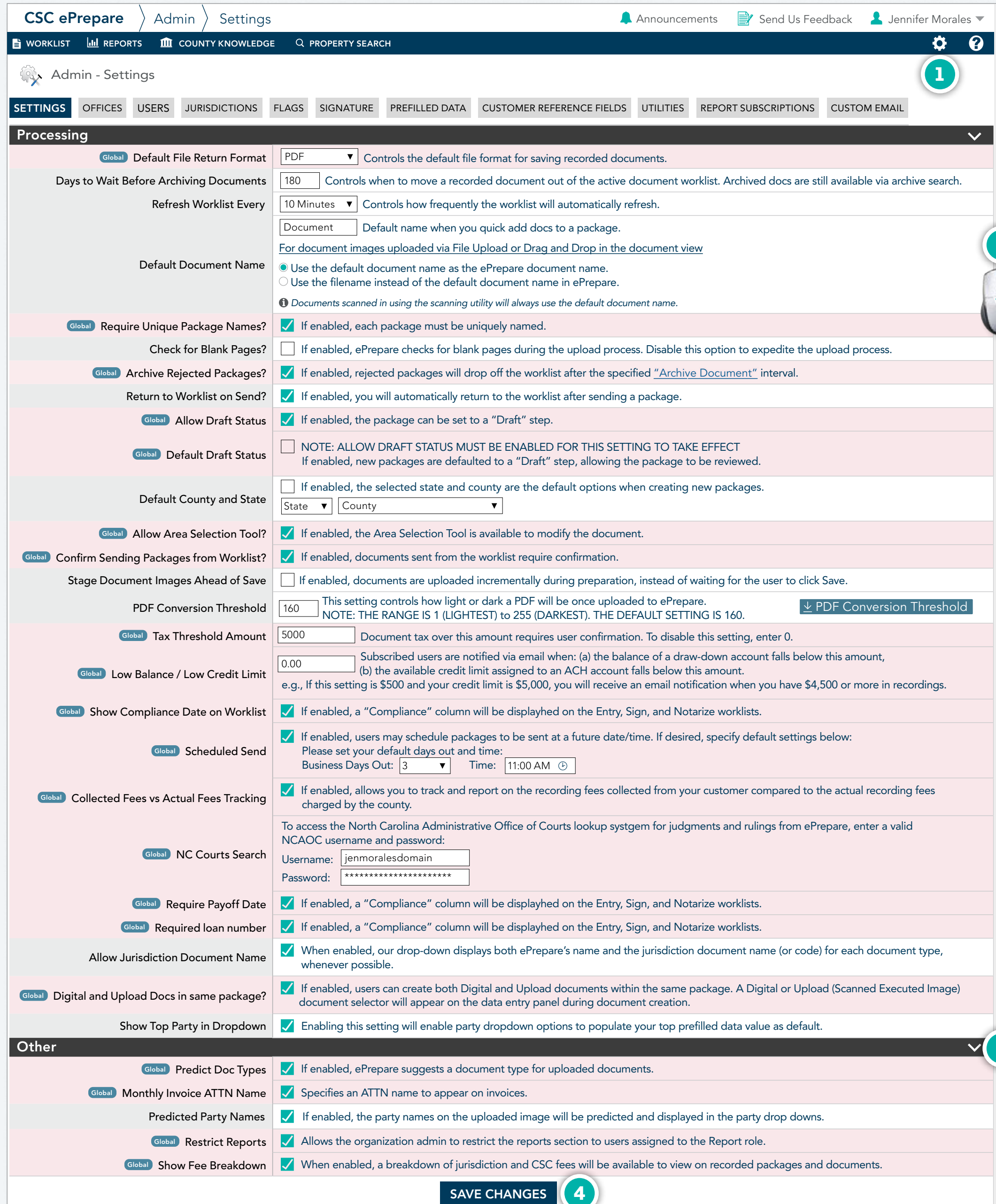
Account administrators also see **Global** settings. These are considered global policies which affect all users, including other administrators.

For your convenience, global settings are highlighted at right.

Settings Are Subject To Change

While we make every effort to keep this guide up-to-date, available settings are subject to change. Settings may also vary, depending on the specific configurations and requested features applied to your ePrepare account.

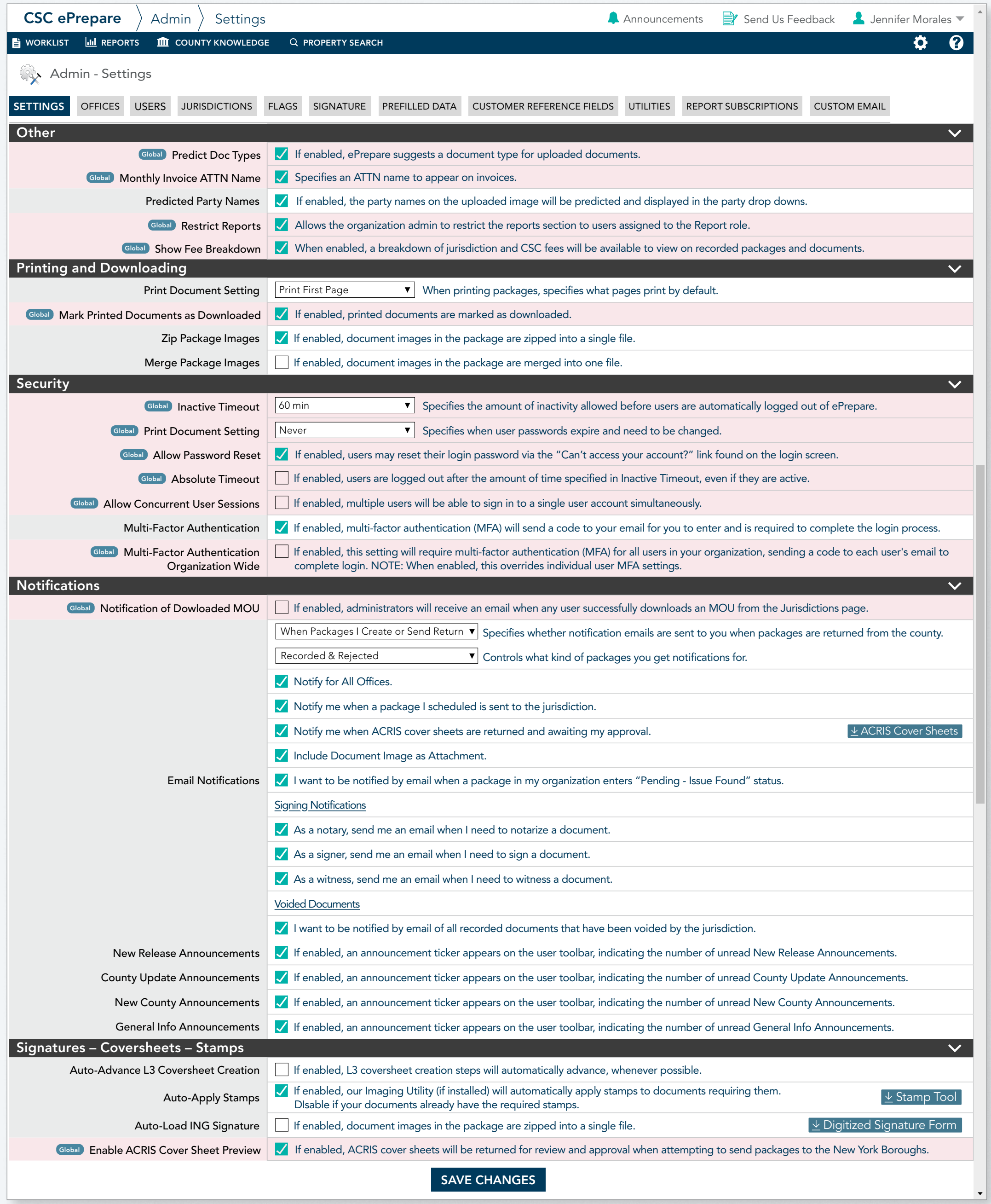
FIGURE 26 | ePrepare Administrator Settings (user and global)



CONTINUED

Global Settings | CONTINUED

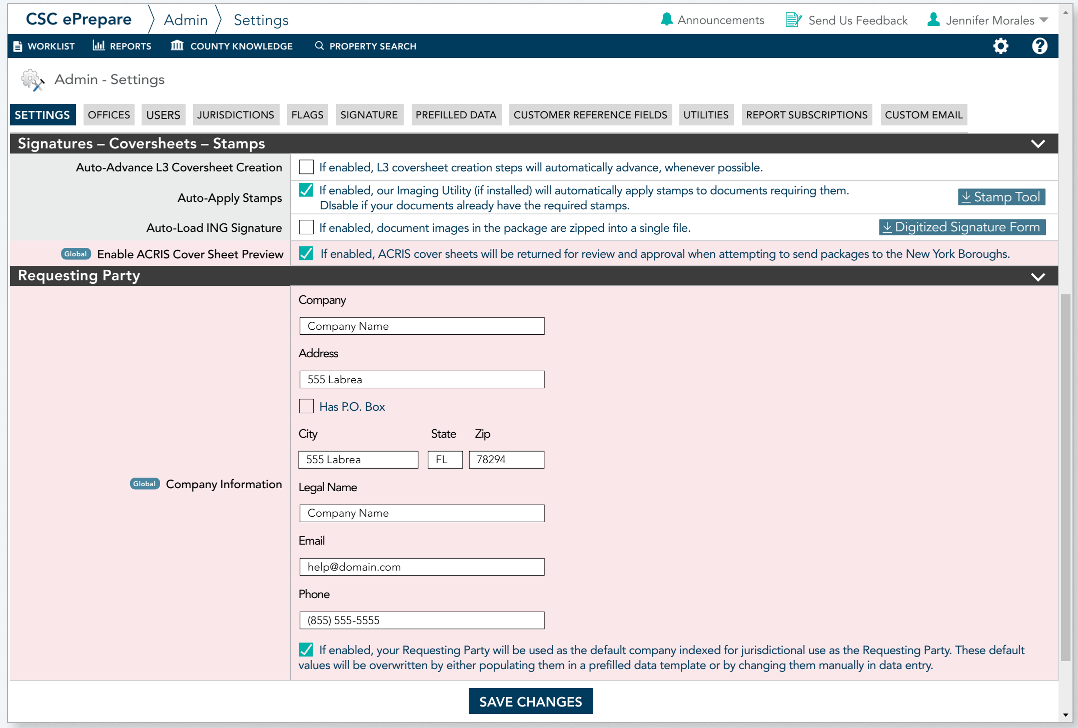
FIGURE 26 | ePrepare Administrator Settings (user and global) | CONTINUED



CONTINUED

Global Settings | CONTINUED

FIGURE 26 | ePrepare Administrator Settings (user and global) | CONTINUED



Congratulations — This concludes our guide!

If you have any questions, please contact us:

1 855 200 1150 **csc-help@cscglobal.com**

CSC

RESOURCES

Feature Guides

- Announcement Preferences
- Borrower Notification Letters
- Calculator ⓘ
- Certified Copies ⓘ
- Changing Jurisdictions
- Correction Requests
- Custom Email Notifications ⓘ
- Customer Reference Fields
- Data Extraction ⓘ
- Design Custom Reports ⓘ
- Doc Type Recognition
- Drag and Drop
- Dynamic Worklist
- eChecks ⓘ
- Fill Ins
- Flags
- Hawaii Fill Ins
- Indexing Names
- Jurisdiction Document Names
- Managing Jurisdictions ⓘ
- Master Accounts ⓘ
- Multi-Titled Documents
- North Carolina Judgment Search ⓘ
- Notes
- Office Management ⓘ
- Onboarding ⓘ
- Prefilled Data
- Property Search ⓘ
- Report Subscriptions ⓘ
- Reporting Hub ⓘ
- Resizable Indexing Panel
- Scanning Photo IDs
- Scheduled Send
- Search for Packages
- Self-Manage ACH Information ⓘ
- Voided Packages

ⓘ This feature may be available to administrators or users with the appropriate roles. Please note that some features may require an activation fee or incur recurring charges. For complete details, refer to the applicable user guide.

Document Editing Guides

- Add Margins Tool
- Auto Correct Tool
- Auto Deskew Tool
- Eraser Tool
- Modifying Pages
- Page Size Tool
- PDF Conversion Threshold
- Scanning Documents to ePrepare
- Selection Tool
- Shift Image Tool
- Stamp Tool
- Text Tool

Supplemental Guides

Excel files are saved to your workstation's Downloads folder.

- Active County List
- Active County List (Excel format)
- CeRTNA | SECURE Document
- ePrepare User Guide for Contractors
- County Authorization Guide ⓘ
- ePrepare Administrative User Guide ⓘ
- ePrepare User Guide
- Important Information for New Users

Troubleshooting Guides

- Adding CSC as a Trusted Website
- Clearing Cache and Cookies
- Counties Prohibiting Document
- ePrepare Package Statuses
- Quickstart Toolbar Guide
- Removing Headers and Footers
- Troubleshooting Page Sizes
- Troubleshooting Tips for ePrepare

Website Resources

- Beginner's eRecording Guide
- Register for ePrepare Training
- Remote Online Notarization
- Reset ePrepare password
- U.S. State Holidays
- California **SECURE** Portal Holidays

CSC provides electronic recording (eRecording) services for real estate documents, enabling clients to securely and efficiently record documents across the country. As a pioneer in the industry, we're committed to deliver the speed and reliability needed to support seamless real estate transactions. To support your success, we offer a comprehensive library of user guides for self-paced learning, along with interactive webinars hosted by our knowledgeable Support Team to answer your questions in real time. To learn more about our services, please visit https://www.cscglobal.com/service/erecording.

We're ready to talk.

1 855 200 1150 **csc-help@cscglobal.com** **cscglobal.com**