

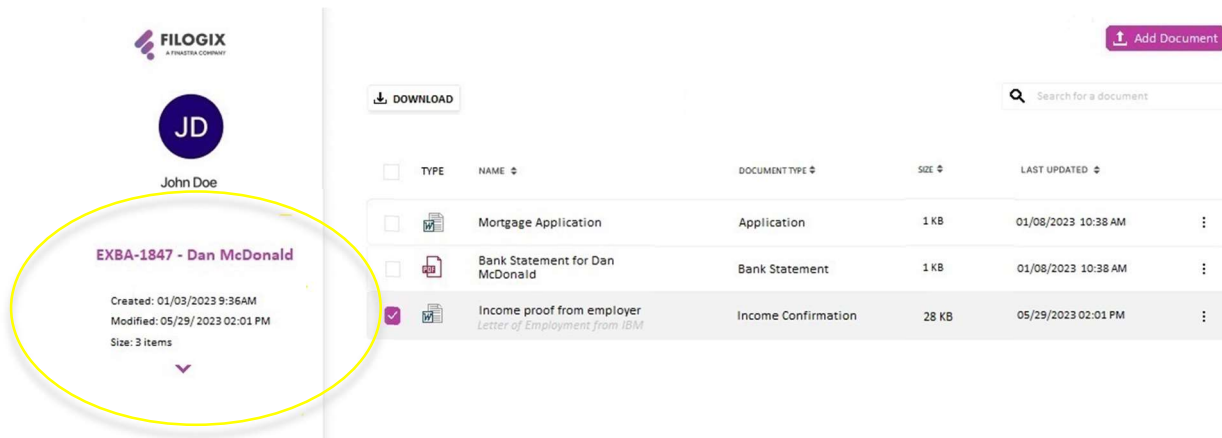
# Exchange Overview

All documents that were previously uploaded to Exchange will be available in the new system. The following provides a high level overview of the user interface.

## Folder Details

The left hand bar displays folder level details including the name of the folder, creation and modification dates, as well as the number of files in the folder

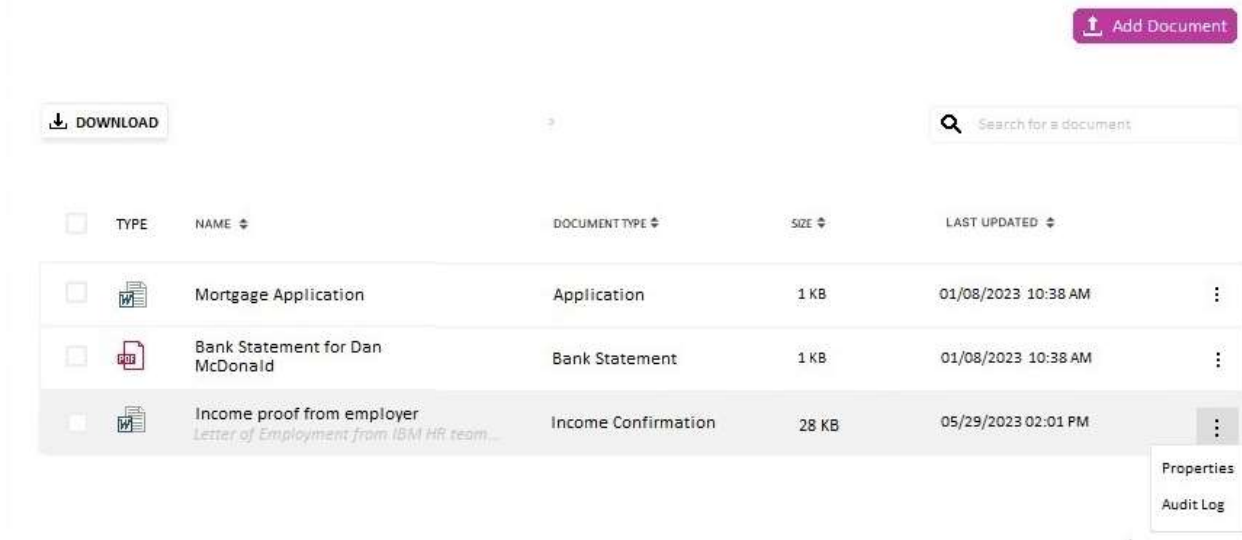
Additional details of the deal are available by clicking on the down arrow



## Documents

The list of documents in the folder is displayed in the main window. The name of the document, document type, size and last modification date are available at a glance.

Clicking on the 'More' button (3 dots) on the far right opens up a menu with access to Properties and the Audit log of the .



The Properties option opens up a right hand tray where you can:

- View or update the document description
- Change the document type
- Add comments

## Uploading – New Feature

Upload documents to your folder using the *Add Document* button. Select files from your computer or use the drag and drop feature.




Select document type ▼

Description: [Click here to add a description](#)

Drop file here




or

Select File

- Application  
 SignedCommitment.doc
- Applicant Identification  
 Drivers\_license.jpg
- Credit Report  
 Equifax Report - DanM.pdf

## Downloading

Use the checkboxes to select one or more documents and press the *Download* button to save the file(s) to the location setup in your browser.

<input type="checkbox"/>	TYPE	NAME ↕	DOCUMENT TYPE ↕	SIZE ↕	LAST UPDATED ↕	
<input type="checkbox"/>		Mortgage Application	Application	1 KB	01/08/2023 10:38 AM	⋮
<input type="checkbox"/>		Bank Statement for Dan McDonald	Bank Statement	1 KB	01/08/2023 10:38 AM	⋮
<input checked="" type="checkbox"/>		Income proof from employer <i>Letter of Employment from IBM</i>	Income Confirmation	28 KB	05/29/2023 02:01 PM	⋮