



User Guide

INSIDE THIS GUIDE:

This guide describes CU*Chat, a chat platform powered by eDOC Innovations where loan staff can chat with applicants regarding their loan application!



Last Revision date: July 7, 2026

Find other Reference Materials page on our website: <https://www.cuanswers.com/resources/doc/cubase-reference/>

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<https://help.cubase.org/cubase/Welcome.htm>

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The CU*Answers Lender*VP team is here to assist at any time. Find us, contact us, and learn more via [The Store](#) | [The Website](#) | [Email](#)

Overview

CU*Chat is a real-time messaging platform integrated with eDOCsSignature, designed to streamline communication for document workflows. The platform enables:

- **Real-time messaging** with instant delivery and notifications
- **Document integration** with attachment sharing and eDOCsSignature packages
- **External collaboration** with secure guest access
- **Team coordination** with threaded conversations
- **Secure communication** with encryption and access controls

CU*Chat can be accessed directly through CBX while working loan applications. CU*Chat portal buttons will appear on the Loan Request Recap screen and on each tab in the loan app workflow, starting with Personal all the way through Print, for easy access at any point in the application process.

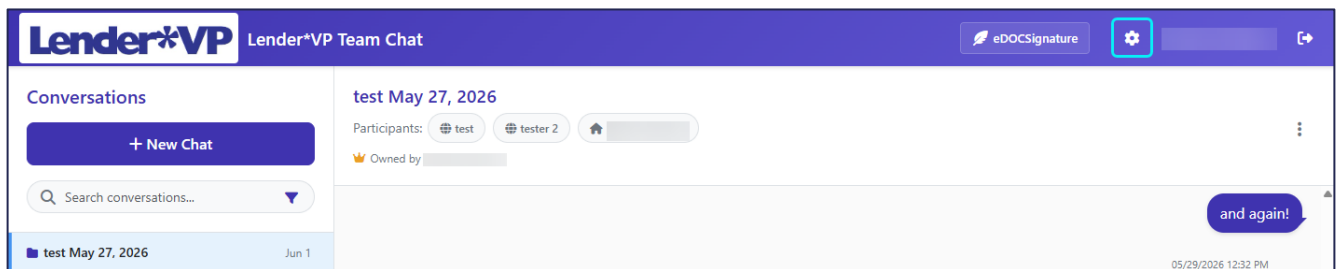
Through the secured chat portal, participants will be able to exchange information, have ongoing conversations, and send any documentation needed for the loan. Any documents that the applicant sends in the chat (proof of income, proof of insurance, etc) will automatically be saved with the package associated with the loan, and the full chat history will save with the loan docs as well for auditing purposes.

*You must be using CU*Forms for lending and be an eDOC Signature client utilizing an enhanced online vault or in-house eDOC vault to use CU*Chat.*

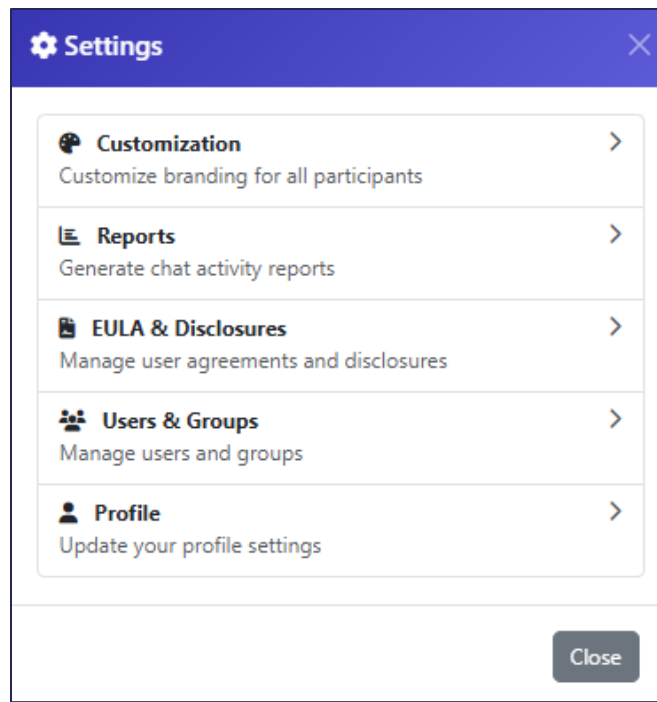
*[Visit the store to get started with CU*Chat today!](#)*

CU*Chat Settings

CU*Chat users can select the gear icon in the header navigation bar to access the settings.

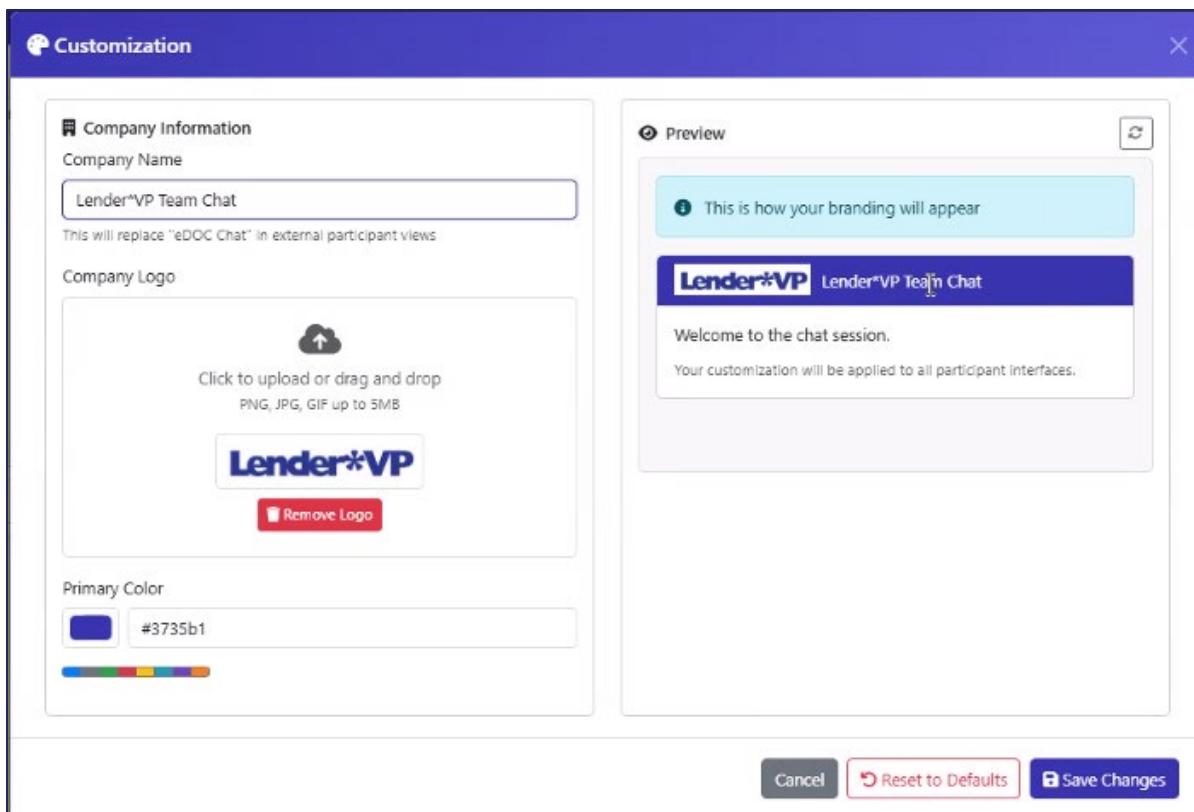


The settings menu will display only the options the user has permission to access. Some CU*Chat users will be granted administrator permissions and the ability to edit special settings.



Select an available option to access its settings page. The chat session will remain active while accessing settings pages.

Administrators will be able to access the **Customization** settings to update the chat portal branding for all users. On this page, the administrator will be able to add your credit union’s name using the Company Name field and upload a logo to appear in the navigation header bar. PNG, JPG, or GIF logos up to 5MB may be uploaded. They will also be able to update the primary color, which appears as the color for buttons, the header background, and sender chat bubbles. This branding customization is set globally and will apply to all portals viewed by internal staff and applicants.



The **Reports** settings allow administrators to generate several on-demand reports about chat activity:

- User Engagement Report
- Conversation Activity Report
- Message Volume Report
- Access Activity Report
- Collaboration Effectiveness Report
- System Activity Report

The **EULA & Disclosures** settings allow administrators to edit the privacy disclosure which external participants will need to agree to in order to access the chat portal. The EULA & Disclosures will appear to participants only when accessing the portal for the first time, unless changes are published to the EULA & Disclosures, in which case the participant will be forced to accept the terms again.

The **Users & Groups** settings allow administrators to add users, edit current user permissions and groups, change passwords for users, and more.

All users will be able to access and update their **Profile** settings. Within the profile, users can update their full name, email, SMS phone number for chat notifications, password, and MFA option (none, Google Authenticator, email, SMS).

Initiating/Accessing a Chat

Loan staff will initiate the conversation via CU*Chat. Applicants will receive a notification via email or text message with a link to access the secure chat portal.

Loan Staff Accessing CU*Chat

Loan staff can access CU*Chat directly through the loan application workflow in CBX or eDOCsSignature Admin. Please note that if a chat is launched through eDOC Signature Admin before creating a package, there will be no indices tied to the chat to which documents can be saved.

Access Via CBX

While working a loan application in CBX, your loan staff may select any **CU*Chat** button from the loan application workflow screens. This button will redirect the user to the chat portal, either creating a new chat with the applicant, or accessing an existing chat if available.

The screenshot shows the 'Loan Request Recap' screen. On the left is a sidebar with navigation options: Edit Loan, UW Comments, Checklist, Save/Done, Override, View/Print Amort, and CU*Chat (which is highlighted with a blue border). The main content area has a top bar with buttons: Complete Loan App, Create Loan Account, OTB Approval/Denial, Deny Loan, and Send to Third Party. Below this is a section for 'Account base' with fields for 'Loan category' (R1 NEW VEHICLES) and 'Loan product' (019 BACK ON THE ROAD - NEW DIRECT AUTO). At the bottom, there are two tables: 'Payment Summary' and 'Application Status'.

Payment Summary		Application Status
Amount requested	65,000.00	Clear Application Data Application created YES Application date Apr 20, 2026
Total amount financed	65,000.00	
+ Total finance charges	18,132.57	

Applicant information from CBX will pre-populate the participant’s information for quick setup. Pre-populated information may include the borrower’s name, email address, and phone number. If a phone number or email address are not listed in the application, they will not be available in the chat as methods of notification. The Conversation Title defaults to the loan application number, the applicant’s name, and the date the chat starts. This title can be edited to whatever you would like. Please keep in mind that the applicant will be able to view this title in their notification and portal as well. If there are multiple applicants on the loan application, you can select which signers to include in the chat.

Create Conversation from Package

Conversation Title

Ashley & Elliott's Auto Loan - June 2026

Package Signers

Select who to include in the conversation

Name	Email	SMS Phone	Notification Method	Auth Code
☒ ASHLEY MEL	ashley.melder@cuanswers.com	+1 (616) 111-2233	☐ Email ☒ Text	Auth Code
☒ ELLIOTT PETTY	elliott.petty@cuanswers.com	+1 (800) 222-3333	☐ Email ☒ Text	Auth Code

Initial Message (Optional)

Enter an optional message to start the conversation...

Cancel

+ Create Conversation

Access Via eDOC

Admin users will be able to access CU*Chat from the eDOCSignature Admin screen by selecting the **Chat** button.

Please note that if a chat is launched through eDOC Signature Admin before creating a package, there will be no indices tied to the chat to which documents can be saved.

eDOCSignature Admin

eDOCSignature

Send Document

Send Package

Manage Packages

Reports

Settings

Set Up Templates

Set Up Package Types

Set Up Bulk Send

Chat

You can also access CU*Chat from the Manage Packages screen in eDOCSignature by selecting the chat bubble icon next to the loan package in the packages list.

eDOCSignature Admin		Package Results				? 🔗	
Menu		1 ID-Pal Verification 🔄		Search			
Search Package/Document Name		All	Created	Modified	JJONES	Next	
1	Application Spring 05-05-2026	Out For eSign	05/05/2026	05/05/2026	JJONES	⚙️	+
1	createsigning repro 20260505-132938	Ready To Sign	05/05/2026	05/05/2026	JJONES	⚙️	+
1	createsigning repro 20260505-132938	Out For eSign	05/05/2026	05/05/2026	JJONES	⚙️	+
1	createsigning repro 20260505-132320	Out For eSign	05/05/2026	05/05/2026	JJONES	⚙️	+
1	createsigning repro 20260505-132320	Ready To Sign	05/05/2026	05/05/2026	JJONES	⚙️	+
1	createsigning repro 20260505-131953	Ready To Sign	05/05/2026	05/05/2026	JJONES	⚙️	+
1	createsigning repro 20260505-131953	Out For eSign	05/05/2026	05/05/2026	JJONES	⚙️	+
0	createsigning repro 20260505-131933		05/05/2026	05/05/2026	JJONES	⚙️	+
0	createsigning repro 20260505-131933		05/05/2026	05/05/2026	JJONES	⚙️	+
2	Fillable PDF From Kyle 04-29-2026	Out For eSign	04/29/2026	04/29/2026	JJONES	⚙️	+

You'll be able to view the existing conversation(s) for that package if available or create a new conversation to link to the package. Select **Open** to jump to the existing conversation or **Create New Conversation** to attach a new conversation to the package.

Chat Conversations for Package
✕

Package:

createsigning repro 20260505-131933 sendnow_false

Existing Conversations:

tuser Apr 16, 2026

Last activity: 4/16/2026
3 participant(s)

Open

Cancel

Create New Conversation

When you create a conversation from eDOCSignature Admin, the system automatically links it to the package and pre-populates signer information for quick setup. The Conversation Title will default to the loan application number, the applicants name, and the date the package is created. This title can be edited to whatever you would like. *Please keep in mind that the applicant will be able to view this title in their notification and portal as well.* If there are multiple applicants on the loan application, you can select which signers to include in the chat.

Create Conversation from Package

Conversation Title
Ashley & Elliott's Auto Loan - June 2026

Package Signers Select who to include in the conversation

Name	Email	SMS Phone	Notification Method	Auth Code
☒ ASHLEY MEL	ashley.melder@cuanswers.com	+1 (616) 111-2233	☐ Email ☒ Text	Auth Code
☒ ELLIOTT PETTY	elliott.petty@cuanswers.com	+1 (800) 222-3333	☐ Email ☒ Text	Auth Code

Initial Message (Optional)
Enter an optional message to start the conversation...

Cancel + Create Conversation

Loan Staff Initiating the Conversation

After accessing CU*Chat from CBX or eDOCSignature, your loan staff can create a new chat with the applicant.

They can choose whether the applicant will be invited to join the chat via email or text message. (If the applicant has only one contact method provided, they will be notified via that method automatically.) The loan staff may also enter an initial message to start the chat that the external participant will see once they join the chat portal.

Your loan staff may also add an authentication word that the external participant must enter to access the conversation session. The authentication word is case-sensitive and can be up to 127 characters. Each participant added may have different authentication words (or none at all). The external participant will need to be notified of the authentication word separately from the chat invite notification.

Your loan staff will select **Create Conversation** to create the conversation and send the notification to the applicant. If an initial message was set, it is posted automatically in the new chat; otherwise, the chat will be empty for all participants until someone sends a message.

Applicant Accessing Chat

Applicants will be sent an invite link via email or text message to join the chat. The invite message includes the applicant's full name, the staff member's full name, the credit union name, the title of the chat, and a link to access the chat portal.

The link provides access to the specific conversation only. External participants cannot access other conversations, see internal system information, create new conversations, or modify conversation settings. Each external participant receives a unique link to the specific conversation.

Hi Tom Heidenga,

You have a new message from Ashley Melder at CU*Answers!
Topic: Auto Loan Application - June 2026

View Chat: https://sandbox.edoclogic.com/edocchatsb/external.php?token=CUA999_945E7E-BC5945496C86-DA3F400F5F4E1B_2ECADD1-DA4084DDC88D4E2FBD529DFF9

Reply STOP to opt out.

You've been invited to conversation: test May 27, 2026

Inbox

CU*Answers 1:10 PM
to me

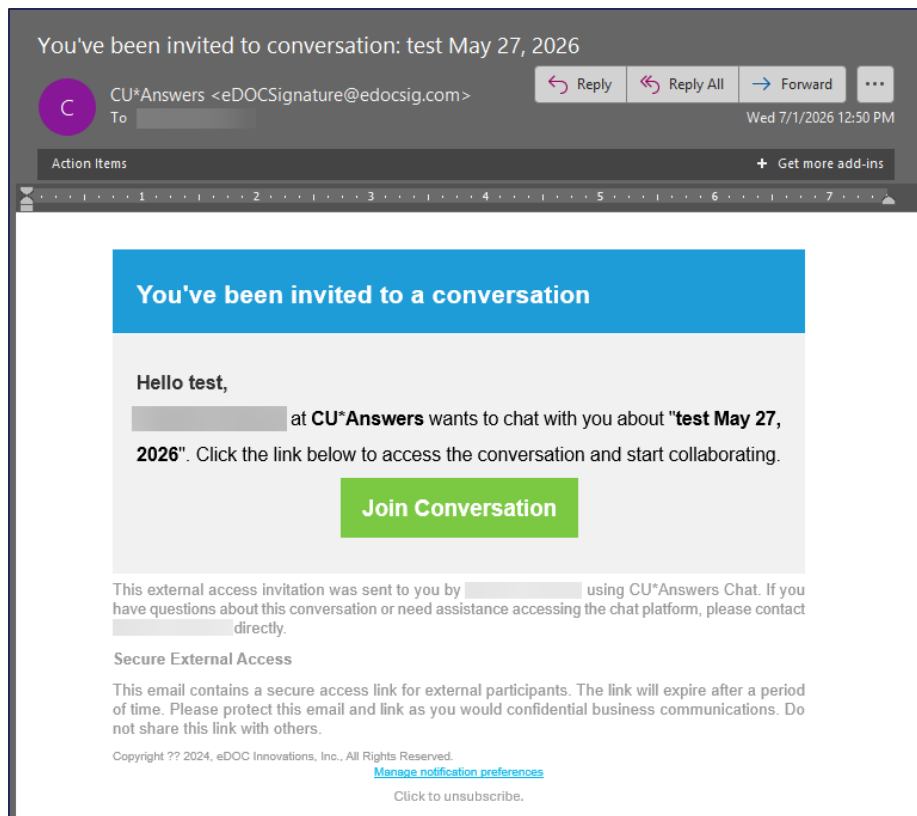
You've been invited to a conversation

Hello test,
[redacted] at CU*Answers wants to chat with you about "test May 27, 2026". Click the link below to access the conversation and start collaborating.

Join Conversation

This external access invitation was sent to you by [redacted] using CU*Answers Chat. If you have questions about this conversation or need assistance accessing the chat platform, please contact [redacted] directly.

Reply Forward



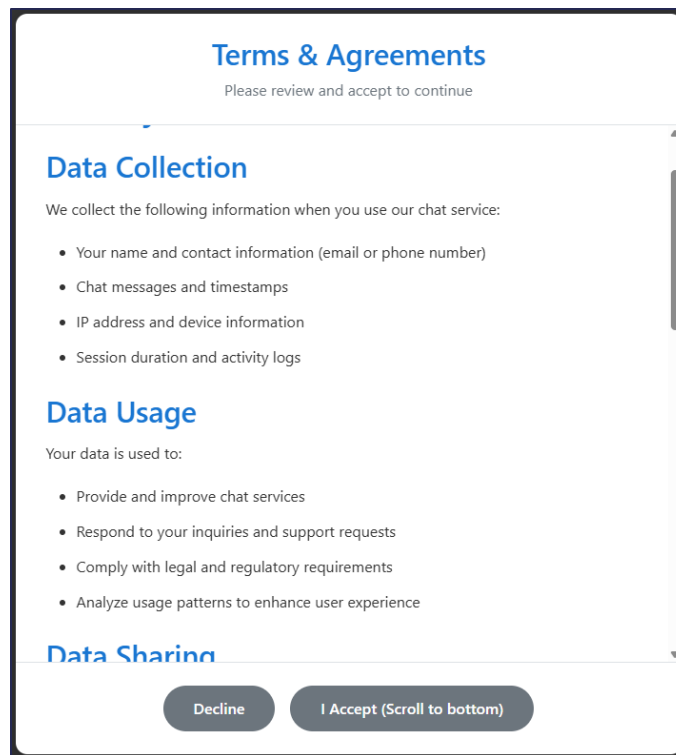
When first selecting the invite link, the applicant will be presented with the configured EULA and disclosures. The user will need to scroll to the bottom and accept the agreements in order to access the chat portal.

If configured by the loan officer for security purposes, the applicant may be required to enter an access code prior to accepting the EULA and accessing the chat portal. Each time the user opens a new session to access the chat, they will need to re-enter the access code.

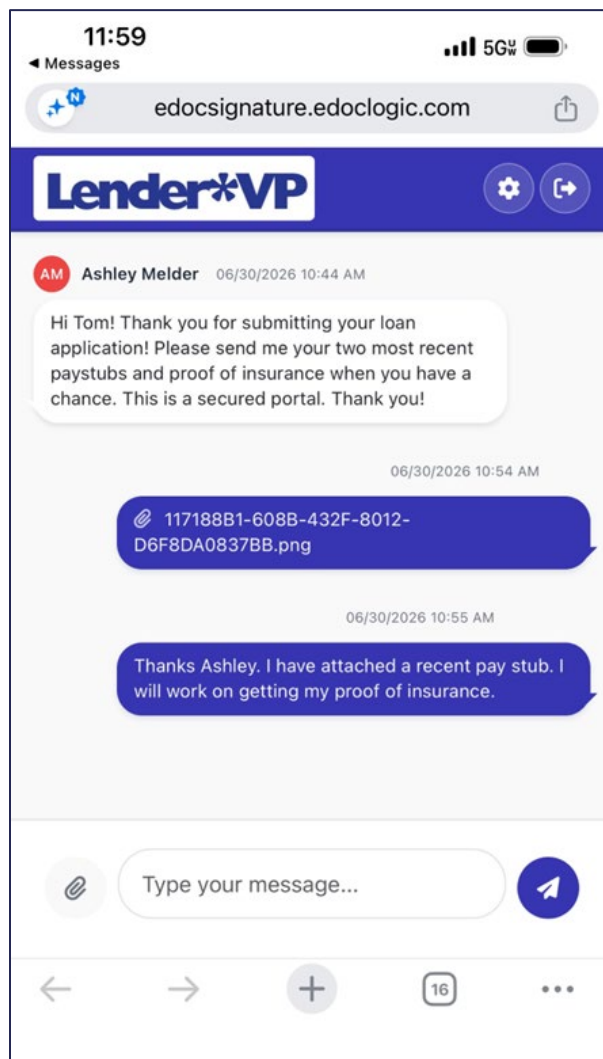
The image shows a screen titled "Access Code Required". At the top, there is a blue shield icon. Below the icon, the title "Access Code Required" is displayed. Underneath the title, it says "Please enter the access code provided by the conversation creator". There is a label "Access Code" followed by a text input field with the placeholder text "Enter access code". Below the input field is a button labeled "Verify Access" with a checkmark icon.

Once the EULA and disclosures are accepted, the user will not view the EULA/disclosure again unless a new version is published. If an administrator updates either the EULA or the Privacy Disclosure, the user will be re-prompted on their next access.

If the user declines the EULA and disclosures, they will be denied access to the chat. The user can re-open the invite link to view the agreements again and choose to accept in order to access the chat.



After accepting the terms and agreements, the user will access the chat portal.



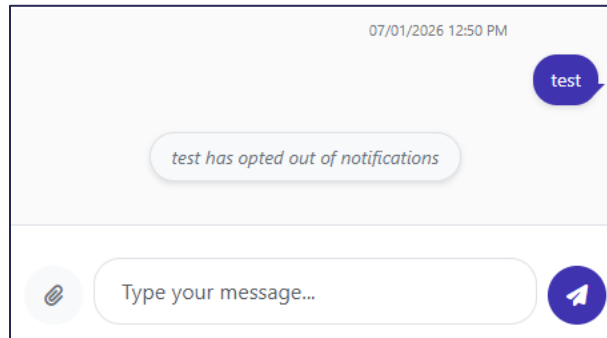
Notification Preferences

External participants receive email and/or SMS notifications for chat activity. External participants may receive notifications for:

- New messages in their conversations
 - Note: If a chat has multiple new, unread messages in a chat within an hour, the participant will receive only one notification. If additional messages are sent after an hour, the participant will receive another notification.
- @mentions directed at them
 - Note: Mentions send an immediate notification to the mentioned participant.
- New conversation invitations
- Important conversation updates

The system provides external participants an unsubscribe mechanism for managing these notifications.

To unsubscribe or resubscribe to email notifications, the participant will select the “Manage notification preferences” link at the bottom of the emails. On the webpage, the participant will need to verify their identity by entering the email address that received the notification. If notifications are enabled, the participant will be able to select **Disable Notifications** to unsubscribe. If notifications are disabled, the participant will be able to select **Enable Notifications** to resubscribe. Their notifications preference update will be listed in the chat, and the Notification Status in the participant’s profile will be updated.



For text messages, participants will be able to opt-out of notifications by texting “STOP”. If the participant opts out via text message (not within the chat portal) they can still access the chat and send messages, but they will no longer receive any text notifications for this chat or future chats. Participants can resubscribe to notifications by texting “START”, but they will have to re-agree to the credit union disclosures to start receiving notifications again.

For text messages, the notifications preference will not be updated in the participant’s profile in CU*Chat. Opting out via text is global at the phone number level. If your credit union has questions regarding whether a participant has opted out via text, please contact eDOC Innovations for confirmation.

Participants will also be able to opt-out of chat notifications from within the chat portal itself. The participant can select the gear icon in chat header to access their settings and then turn off the *Receive Notifications* toggle.

My Settings

External Participant

Name

test

2-255 characters. Letters, numbers, spaces, hyphens, apostrophes, periods, and @ allowed.

Email

Valid email address format required.

Phone/SMS

+1 (555) 555-5555

US phone numbers only.

Auth Code (optional)

Enter auth code

Optional verification code for this participant.

Notification Status

☐ Notifications Disabled

When disabled, this participant will not receive any email or SMS notifications for this conversation. They can still access and participate in the conversation.

Cancel

Save Changes

When opting out of notifications via the chat portal, the participant's notifications preference update will be listed in the chat, and the Notification Status in the participant's profile will be updated. The internal participants will also receive an email notifying them that the participant has opted out of notifications.

test has opted out of notifications

CU*Answers <eDOCSignature@edocsig.com>

To

Reply

Reply All

Forward

Wed 7/1/2026 3:44 PM

1

2

3

4

5

6

7

Chat Notification Status Update

Hello ,

test has opted out of notifications for the conversation "**test May 27, 2026**".

They will still have access to the conversation but will no longer receive email or SMS notifications for new activity unless they re-subscribe.

View Conversation

This notification was sent to you by CU*Answers using CU*Answers Chat. If you have questions, please contact CU*Answers at eDOCSignature@edoclogic.com.

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Click to unsubscribe.

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Credit union staff may also turn off notifications on behalf of the external participant. To turn off a participant's notifications for a conversation, open the chat. There are two ways to access the necessary screen. The first method is by selecting the participant's name listed in the conversation header. The second method is by selecting the three dots icon and **Edit Conversation**. Then, under the Participants tab, you will select the pencil icon next to the participant.

Once you reach the View Participant screen, you can turn the toggle off for *Receive Notifications* and select **Save Changes**.

View Participant

External Participant

Name

test

2-255 characters. Letters, numbers, spaces, hyphens, apostrophes, periods, and @ allowed.

Email

Valid email address format required.

Phone/SMS

+1 (555) 555-5555

US phone numbers only.

Notification Status

☒ Receive Notifications

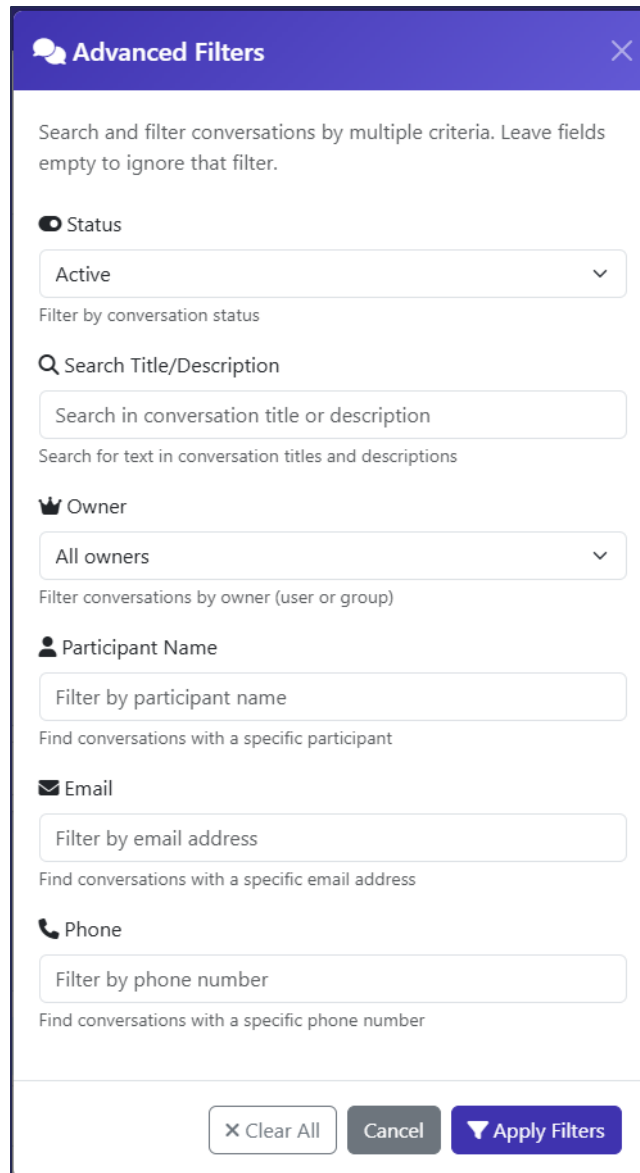
When disabled, this participant will not receive any email or SMS notifications for this conversation. They can still access and participate in the conversation.

Cancel Save Changes

Searching for Chats

Within CU*Chat, you'll be able to search for chats, both active and closed, even if you are not a participant in the chat.

Use the *Search conversations...* search bar to find conversations. Select the filter icon to view and set search filters. Search can be filtered by conversation status (active or closed), text in the title/description, chat owner, participant name, email, and/or phone number. Select **Apply Filters** to update the list of conversations based on the filtered search results.

The image shows a mobile application dialog box titled "Advanced Filters" with a close button (X) in the top right corner. The dialog contains several filter sections, each with an icon, a title, a text input field, and a description. The sections are: "Status" with a status icon, a dropdown menu showing "Active", and the description "Filter by conversation status"; "Search Title/Description" with a magnifying glass icon, a text input field containing "Search in conversation title or description", and the description "Search for text in conversation titles and descriptions"; "Owner" with a crown icon, a dropdown menu showing "All owners", and the description "Filter conversations by owner (user or group)"; "Participant Name" with a person icon, a text input field containing "Filter by participant name", and the description "Find conversations with a specific participant"; "Email" with an envelope icon, a text input field containing "Filter by email address", and the description "Find conversations with a specific email address"; and "Phone" with a telephone icon, a text input field containing "Filter by phone number", and the description "Find conversations with a specific phone number". At the bottom of the dialog are three buttons: "X Clear All", "Cancel", and "Apply Filters".

Advanced Filters

Search and filter conversations by multiple criteria. Leave fields empty to ignore that filter.

Status

Active

Filter by conversation status

Search Title/Description

Search in conversation title or description

Search for text in conversation titles and descriptions

Owner

All owners

Filter conversations by owner (user or group)

Participant Name

Filter by participant name

Find conversations with a specific participant

Email

Filter by email address

Find conversations with a specific email address

Phone

Filter by phone number

Find conversations with a specific phone number

X Clear All Cancel Apply Filters

Chatting

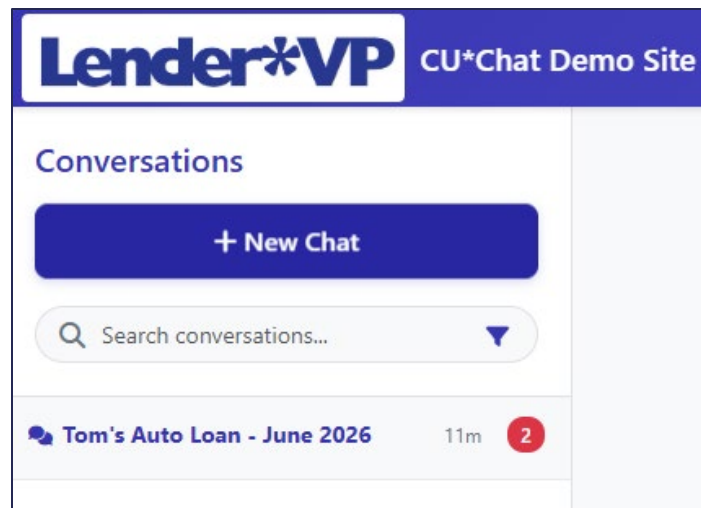
Access your chat from the list of conversations. Type a message in the chat bar and use Enter or select the send icon to send the message. Messages will appear instantly for online participants. The sender's name and message date-timestamp are always displayed.

There are several messaging features available for use:

- @mentions – Type @ followed by a name to immediately notify specific participants.
- Emojis – Type ":" followed by an emoji name (e.g., :thumbsup) to access an auto-complete list of matching emojis to select from. The emoji will display once the message is sent.
- Multi-line messages – Use Shift+Enter to create a line break.

You'll see "[Name] is typing..." when other participants are composing a message in the conversation.

Each conversation in the queue will show an unread badge with the count of new messages since you last opened it.



Messages have a 1 MB length cap; pasting extremely large blocks of text will be rejected with an error.

Attachments

Any participant may send attachments within the chat. To attach a file to your message, select the paper clip icon. Select the file to attach from your file library. You may edit the message linked to the attachment; however, text must be included to send the attachment, and only one file may be attached per message.

The maximum file size is 25 MB per attachment. Consider compressing large files. Supported file formats include JPG, JPEG, PNG, GIF, PDF, DOC, DOCX, TXT, and ZIP.

Note: File types like WEBP, XLS, XLSX, PPT, PPTX, CSV, and RAR are not supported.

Files are encrypted for security. Selecting a message that has the paper clip icon will download the attachment. Any attachments sent in the chat will be saved as separate reference documents on the package.

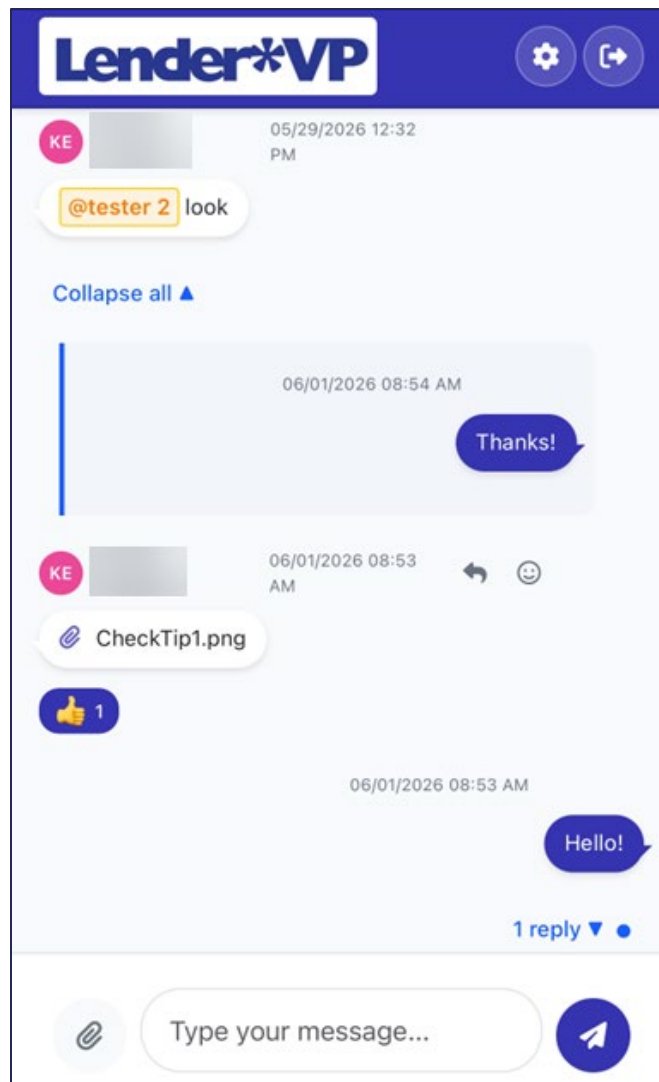
Note: CU*Chat is not meant to act as a signing room. Therefore, we do not recommend sending closing documents via CU*Chat.

Replies and Reactions

Participants are able to reply directly to another participant's message by hovering over the message and selecting the arrow icon. Enter the reply text in the *Reply to thread...* textbox and use Enter or select the send icon next to it to send the reply. The reply thread will be nested under the parent message.

Replies can be used to keep discussions organized by topic. Replies can be collapsed/expanded by selecting the *Collapse all/X replies* text. A blue dot icon next to the reply count indicates unread replies.

Participants can also use emojis to react to messages sent by other participants by hovering over the message and selecting the smile icon. Choose from the quick options or select the + to search through more emoji options. Multiple reaction emojis can be added to a message. To remove a reaction emoji, simply click the reaction.



Message Edits

Messages can be edited or deleted by the sender. The sender will hover over their message and select either the edit or delete icons.

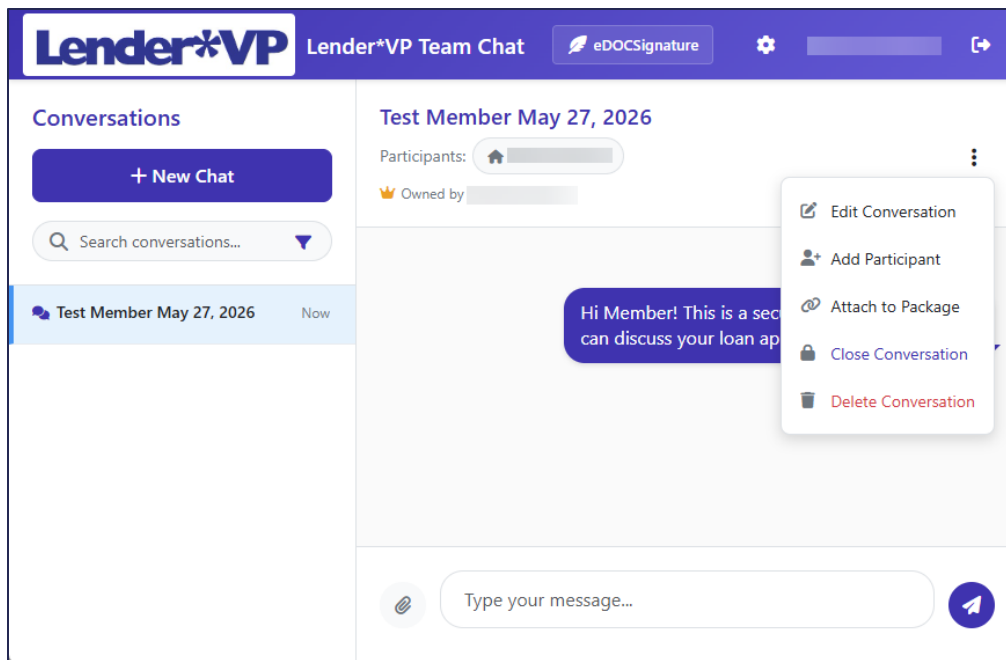
Select the edit icon, make changes, and select **Save** to edit the message. Editing can only be done 24 hours after sending the message. The text “(edited)” will appear next to the timestamp indicating that the message has been edited.

Select the delete icon and **Delete Message** to delete the message. The message will be replaced with a greyed-out message stating “*This message was deleted*”.

Editing Conversations

Within a chat, you may select the three dots icon in the conversation header to edit the conversation.

Select **Edit Conversation** to edit participants, conversation settings, and indices.



Participants

Conversations consist of two types of participants: internal and external. Internal participants are credit union staff who are eDOCSignature users; external participants are the applicants (non-eDOCSignature users).

External participants cannot:

- Access other conversations
- See internal system information
- Create new conversations
- Modify conversation settings

Internal participants are indicated by a house icon, and external participants are indicated by a globe icon in the chat header.

Each chat will have an owner, which is the internal participant who has full control over the conversation, indicated by the crown icon. The owner is whoever started the chat unless ownership is transferred.

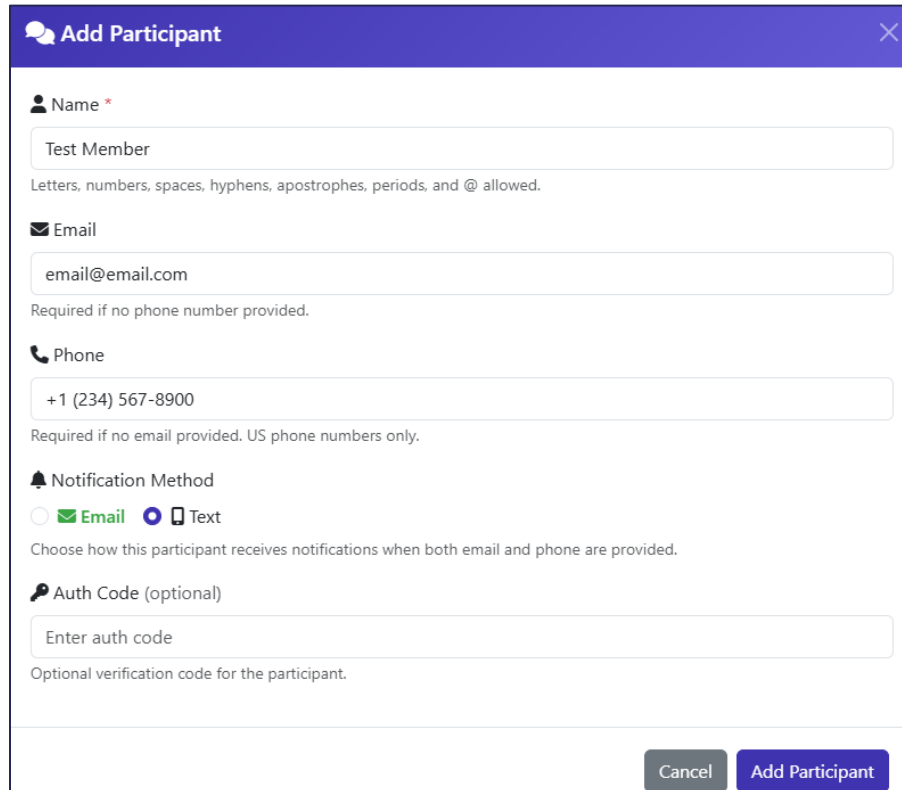
Another internal participant can access the chat simply by searching for it and sending a message in it. They will also have full authority to edit, close, and delete. This is a great use case if someone is unexpectedly out of the office.

When editing a conversation, select the participants tab to view participant details. Participant information includes their name, email address, and participant type (Internal, External, Owner)

After a chat is created, you can add additional participants (internal or external) or remove participants. This will be useful when co-signers are added to a loan application after the chat was created or to ensure the applicant has ongoing communication with the credit union even when a staff member is out of office.

While in a chat, select the three dots icon in the chat header for more options, then select **Add Participant**. Enter the participant's *Name* and their *Email* address and/or *Phone* number. If both are added, set their chat *Notification Method* as either Email or Text. You may also enter an *Auth Code*, which

they must use to access the chat. Select **Add Participant** to invite the new participant to the chat. When a new participant is added to a chat, they will be able to view all previous messages exchanged.

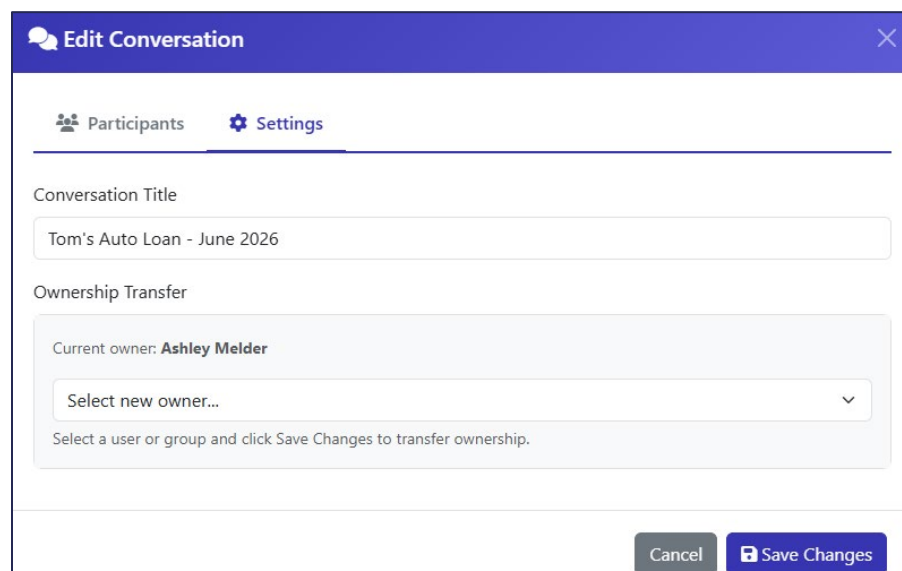


The 'Add Participant' dialog box is a vertical form with a purple header bar containing a speech bubble icon and the title 'Add Participant' with a close button (X). The form contains several sections: 'Name' with a text input field containing 'Test Member' and a note 'Letters, numbers, spaces, hyphens, apostrophes, periods, and @ allowed.'; 'Email' with a text input field containing 'email@email.com' and a note 'Required if no phone number provided.'; 'Phone' with a text input field containing '+1 (234) 567-8900' and a note 'Required if no email provided. US phone numbers only.'; 'Notification Method' with two radio buttons, 'Email' (selected) and 'Text'; and 'Auth Code (optional)' with a text input field containing 'Enter auth code' and a note 'Optional verification code for the participant.' At the bottom right are 'Cancel' and 'Add Participant' buttons.

If an external participant loses the link to the chat, you'll be able to get the link to share with the external participant again. Within the chat, select the three dots icon and **Edit Conversation**. Then, under the Participants tab, select the **Get Link** button next to the appropriate external participant. Select the **Copy** button to copy the external access link, then share the link with the participant. You may also use the mention feature by sending a chat message with the @ sign followed by their name to send them an immediate notification with a link to the chat portal.

Conversation Settings

To edit a conversation, select the three dots icon and **Edit Conversation**. Select the Settings tab to view conversation settings. The Conversation Title can be updated, and chat ownership can be transferred.



The 'Edit Conversation' dialog box has a purple header bar with a speech bubble icon, the title 'Edit Conversation', and a close button (X). It features two tabs: 'Participants' (selected) and 'Settings'. The 'Settings' tab is active, showing a 'Conversation Title' text input field with 'Tom's Auto Loan - June 2026'. Below is an 'Ownership Transfer' section with a 'Current owner: Ashley Melder' label, a 'Select new owner...' dropdown menu, and a note 'Select a user or group and click Save Changes to transfer ownership.' At the bottom right are 'Cancel' and 'Save Changes' buttons.

On the Settings tab of the Edit Conversation screen, use the *Select new owner...* dropdown to select an internal user to whom chat ownership will be transferred. Select **Save Changes**. The previous owner will become a regular internal participant.

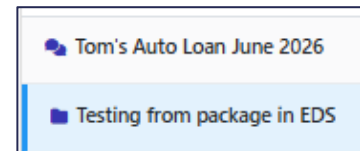
Indices

If the conversation is attached to a package, the Indices tab will appear on the Edit Conversation screen for you to select which table the chat history and documents should be saved to when the chat is closed.

Attaching to a Package

If you created a conversation without linking it to a package, you can attach it to a package later. While in a chat, select the three dots icon in the chat header for more options, then select **Attach to Package**. Search for the package and/or select the package from the dropdown. Use **Attach Package** to attach the existing package to the conversation.

After a package is attached to a conversation, the icon for the chat in the list of conversations will change from chat bubbles to a folder.

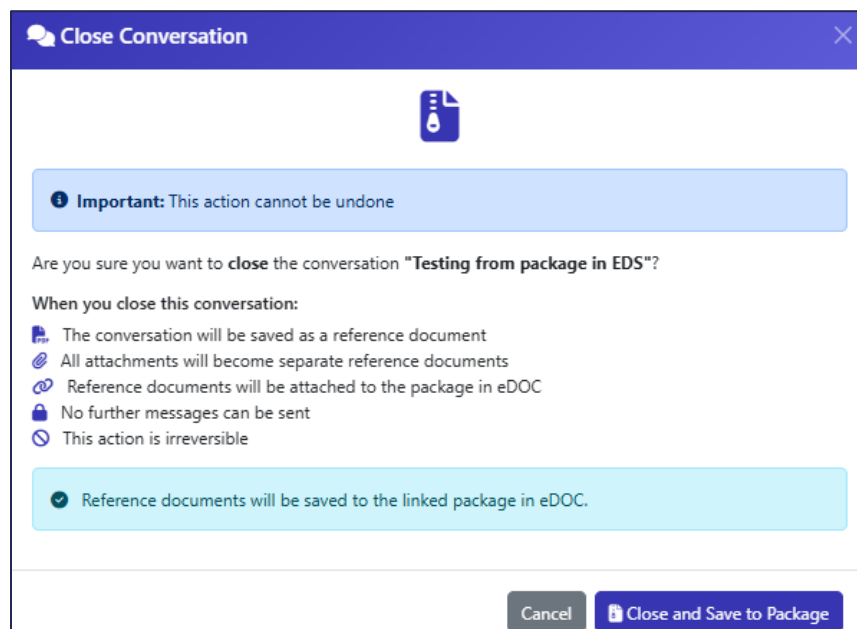


Closing Conversations

Closing a conversation is irreversible. When a conversation is closed, no further messages can be sent. If the applicant tries to access the chat after it's been closed, it will notify them that the chat has been closed and that they should contact the financial institution if they need assistance. Closed chats are stored forever until manually deleted.

When a conversation is closed, the chat history will be saved to the attached package as a reference document, and all attachments will become separate reference documents. These reference documents will be saved with the rest of the package to the vault.

To close a conversation, select the three dots icon in the chat header for more options, then select **Close Conversation**. Select **Close and Save to Package** to confirm chat closure.

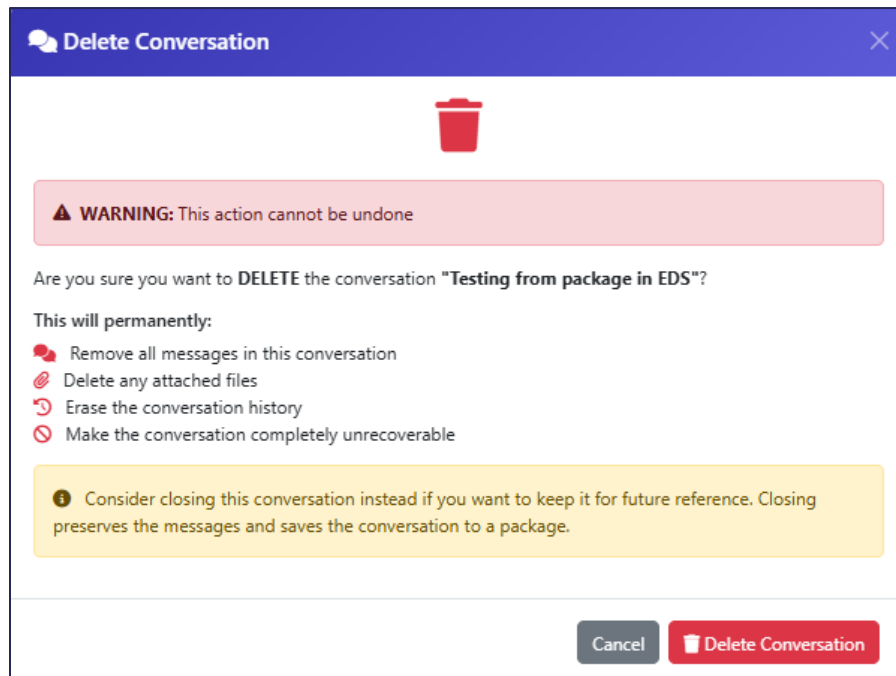


Deleting Conversations

Deleting a conversation is irreversible. When a conversation is deleted, all messages in the conversation are removed, any attached files are deleted, and the conversation history is erased. We recommend deleting a chat only if the conversation was opened in error or if it is of no importance for record retention as these chats cannot be recovered once deleted.

Active chats are automatically deleted after 90 days of inactivity.

To delete a conversation, select the three dots icon in the chat header for more options, then select **Delete Conversation**. Select **Delete Conversation** again to confirm chat deletion.



Happy chatting! 😊