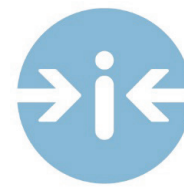




RealEC Exchange Admin User Guide for Providers

This User Guide is intended for providers that will be utilizing the RealEC Exchange Administration Site.

8/25/2015



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If you need assistance, contact support at:

1-877-2REALEC (1-877-273-2532)

Or send an email to support@realec.com and a support analyst will contact you.

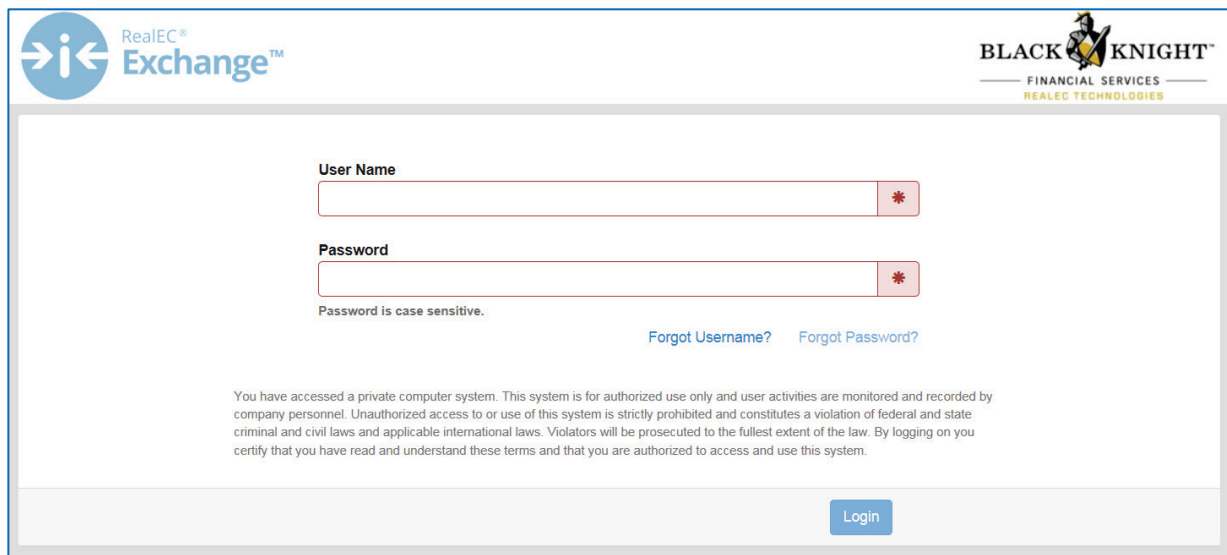
Navigate to RealEC Exchange (Admin)

Use the below URL to navigate to the RealEC Exchange Admin site.

<https://Admin.RealECExchange.com>

Login to the Admin Site

Log in to the Admin site with your UserID and temporary password provided in email. Upon first login, you will be prompted to choose a permanent password and set up security questions and answers for future password resets. A minimum of 6 security questions are required to be set up.



The image shows the login page for the RealEC Exchange Admin site. The page has a white background with a blue border. In the top left corner is the RealEC Exchange logo. In the top right corner is the Black Knight Financial Services RealEC Technologies logo. The main content area contains two input fields: "User Name" and "Password". Both fields have a red asterisk icon to their right. Below the password field, it says "Password is case sensitive." Below the input fields are two links: "Forgot Username?" and "Forgot Password?". At the bottom of the page is a blue "Login" button. A disclaimer is visible below the links, stating that the system is for authorized use only and that unauthorized access is prohibited.

RealEC® Exchange™

BLACK KNIGHT™
FINANCIAL SERVICES
REALEC TECHNOLOGIES

User Name

Password

Password is case sensitive.

[Forgot Username?](#) [Forgot Password?](#)

You have accessed a private computer system. This system is for authorized use only and user activities are monitored and recorded by company personnel. Unauthorized access to or use of this system is strictly prohibited and constitutes a violation of federal and state criminal and civil laws and applicable international laws. Violators will be prosecuted to the fullest extent of the law. By logging on you certify that you have read and understand these terms and that you are authorized to access and use this system.

Login

Password Guidelines

The password should meet the following requirements:

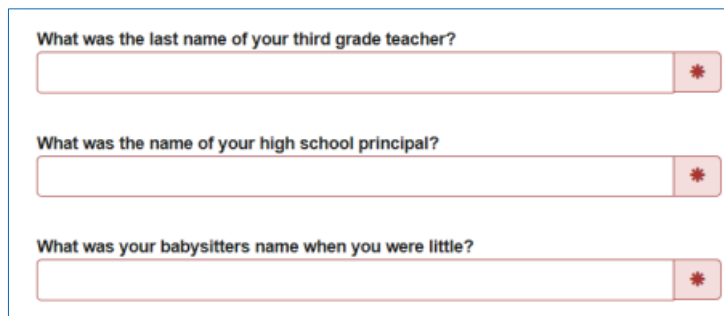
- Must be between 8-20 alphanumeric characters
- Must not contain repeating characters
- Must contain at least one digit or special character
(Special characters are: `!@#&\$%^*()_+{}:<>?-=[]\;.,/)
- Must contain an upper case character
- Must contain a lower case character
- Must not contain illegal characters
(Any character not specified in special characters is illegal character. Example: [Space]'|~")
- Must not contain username

Security Questions

User must pick a minimum of 6 Security Questions and Answers. Please see the *Establishing Security Questions* job aid for more information.

Select questions from the dropdown and click the **Add** button.

- Each answer must be 4 characters or more
- Cannot pick same answer twice
- Cannot have same answer to multiple questions
- All questions chosen must have an answer



What was the last name of your third grade teacher?

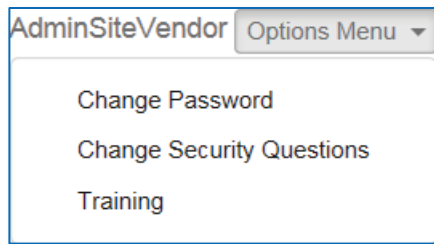
What was the name of your high school principal?

What was your babysitters name when you were little?



Options Menu

The Options Menu allows the user to change their password, change their security questions and access the Training page.



Change Password

User must successfully answer 3 Security Questions and enter their current password. New password must follow the Password Guidelines above and cannot match previous 12 passwords.

Change Security Questions

User must successfully answer 1 current Security Question and enter their current password.

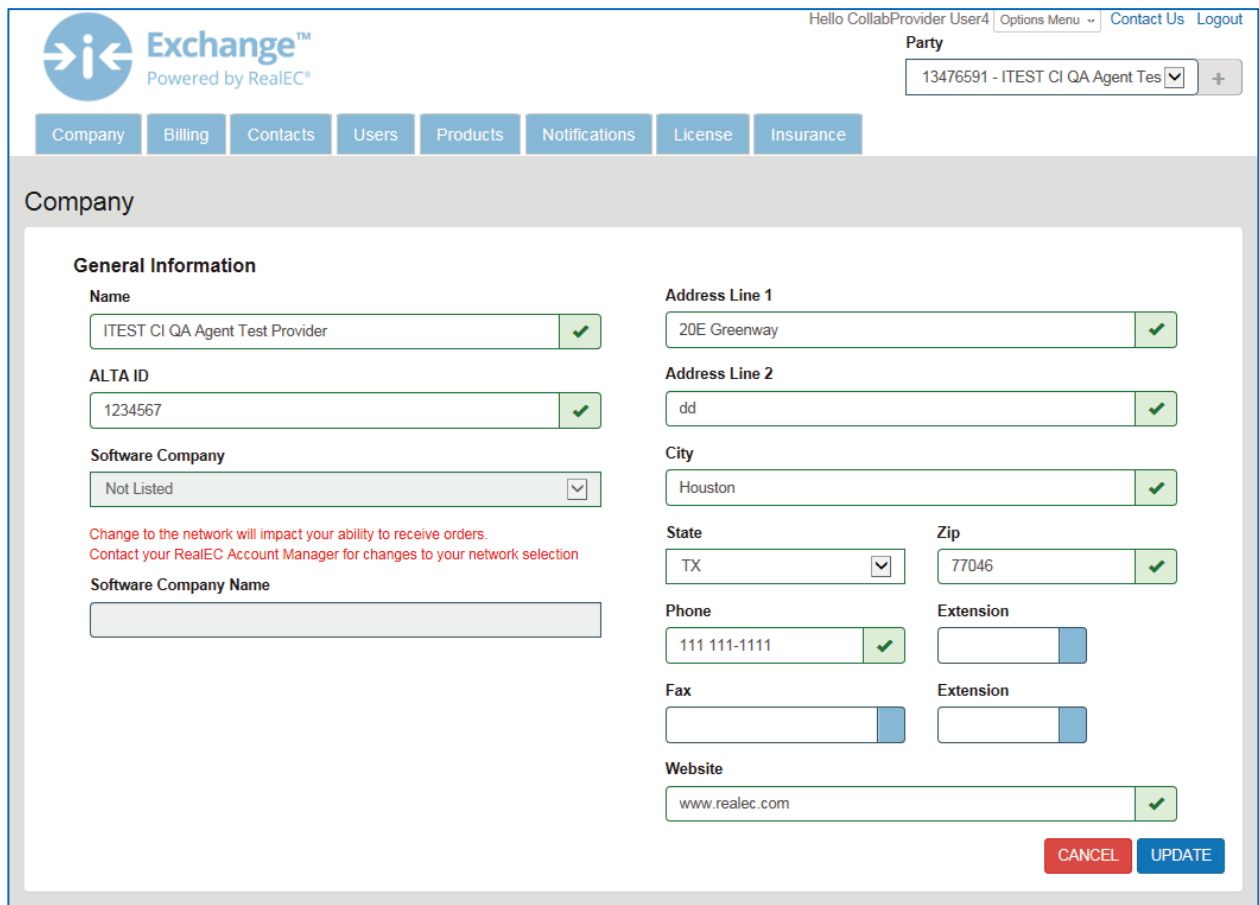
Training

Opens the RealEC Training page in a new window. Access Training guides, job aids, videos and other training documentation for the RealEC Exchange.



The **Company** tab will appear by default & will display general company information. The user may choose between all Party IDs that they have access to by utilizing the Party dropdown at the top of any page. The Primary Party ID is displayed by default.

Each of the Admin options is represented by tabs across the top of the page. See the following sections for information on each of the Admin options.



Exchange™ Powered by RealEC®

Hello CollabProvider User4 | Options Menu | Contact Us | Logout

Party: 13476591 - ITEST CI QA Agent Tes

Company | Billing | Contacts | Users | Products | Notifications | License | Insurance

Company

General Information

Name
 ✓

ALTA ID
 ✓

Software Company
 ▼

Change to the network will impact your ability to receive orders.
Contact your RealEC Account Manager for changes to your network selection

Software Company Name

Address Line 1
 ✓

Address Line 2
 ✓

City
 ✓

State
 ▼

Zip
 ✓

Phone
 ✓

Extension

Fax

Extension

Website
 ✓

CANCEL **UPDATE**

The **Company** tab will display general company information, including the physical address, phone and fax numbers, company website and ALTA ID.

Additional fields:

Software Company – user selects Software Company during registration. If incorrect, user must contact RealEC Support to update.

Software Company ID/Name – user inputs during registration. If incorrect, user must contact RealEC Support to update.

Update applicable information and click **Update** when done.

Company

General Information

Name

ITEST CI QA Agent Test Provider

✓

ALTA ID

1234567

✓

Software Company

Not Listed

▼

Change to the network will impact your ability to receive orders.

Contact your RealEC Account Manager for changes to your network selection

Software Company Name

Address Line 1

20E Greenway

✓

Address Line 2

dd

✓

City

Houston

✓

State

TX

▼

Zip

77046

✓

Phone

111 111-1111

✓

Extension

Fax

Extension

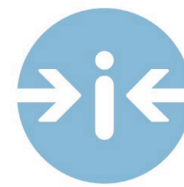
Website

www.realec.com

✓

CANCEL

UPDATE



The billing tab allows the Admin user to view product pricing, view monthly statements, view promotional code, update billing preference (credit card or paper billing) and update the credit card information used for billing.

Billing Information

Base Level Product Pricing

View Billing Report

Registration Fee

If you have a Promotional Code enter it here and click Apply.

Promotional Code

☒

APPLY

Registration Fee:

\$149.00

Annual Processing Fee:

\$50.00

Total:

\$199.00

Registration Fee: RealEC assesses a one-time set up fee upon initial registration. Payment of the registration fee must be submitted before your account is activated.

Annual Processing Fee: This fee is incurred each year during the annual renewal period for the registered company. Payment of the Initial fee must be submitted during the registration process, subsequent annual charges will be assessed during the monthly billing process.

Billing Method

To enter your credit card information, click the button below to be redirected to another website. Once you have completed entering your credit card information, return here and click Refresh to confirm processing.

Billing Preference

Credit Card

▼

Change Credit Card

Refresh

Your Credit Card information has been successfully received and authorized.

Status: Authorized

Expiration Date: 02/2018

☐ **Financial Acknowledgement** ^{*}

RealEC will provide an invoice on a monthly basis for the fees and expenses. The invoiced amount must be paid in full on or prior to 30 calendar days after the date of each RealEC invoice. Failure to pay the amount due may impact your ability to participate on the RealEC Exchange and may incur additional charges.

UPDATE



At the top of the Billing page are the links to check Product Pricing and View Billing Report.

Product Pricing

To check current product pricing, click the *Base Level Product Pricing* link. The RealEC Fee Schedule (PDF) will open in a new browser tab.

View Billing Report

Click the *View Billing Report* link to open the billing report in a new browser tab.

Billing Information

[Base Level Product Pricing](#)
[View Billing Report](#)

Registration Fee

The Promotional Code is entered during registration to discount fees and must be present in order to choose paper billing as a billing option. RealEC Support must be contacted to make changes to the Promotional Code field.

Registration Fee

If you have a Promotional Code enter it here and click Apply.

Promotional Code

✓

Registration Fee:	\$149.00
Annual Processing Fee:	\$50.00
Total:	\$199.00

Registration Fee: RealEC assesses a one-time set up fee upon initial registration. Payment of the registration fee must be submitted before your account is activated.

Annual Processing Fee: This fee is incurred each year during the annual renewal period for the registered company. Payment of the Initial fee must be submitted during the registration process, subsequent annual charges will be assessed during the monthly billing process.

Billing Method lets the Admin User choose between Credit Card & Paper Billing options. Credit Card is the default Billing Preference and a Promo code must be entered in order to choose Paper Billing.

Billing Method

To enter your credit card information, click the button below to be redirected to another website. Once you have completed entering your credit card information, return here and click Refresh to confirm processing.

Billing Preference

Credit Card

▼

Change Credit Card

Refresh

Your Credit Card information has been successfully received and authorized.

Status: Authorized

Expiration Date: 02/2018



To enter or update credit card information used for billing, click the

Billing Preference

Credit Card

Change Credit CardRefresh

Your Credit Card information has been successfully received and authorized.

Status: Authorized

Expiration Date: 02/2018

Change Credit Card button.

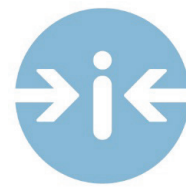
A pop-up will appear warning you that you will be redirected outside of the RealEC Exchange. Click **Continue** so proceed to the AFS billing site. Your Credit Card information must be completed within 5 minutes or your session will expire.

Enter/Edit Credit Card Information

You will be directed to a RealEC secure site to enter your credit card information.

Your Credit Card information must be completed in 5 minutes or your session will expire.

CONTINUECANCEL



The form will open in a new window and allow you to enter/update credit card information. Click **Submit Transaction** when done. The system will alert you to the status of your credit card information and advise you to close the window.

***Note: Do not close your entire browser window, only close the tab where the billing information was entered.*

A valid credit card must be entered. After four failed credit card attempts, the account will be locked and you must contact RealEC Support to unlock.

**Exchange™**
Powered by RealEC®

Provider:

DVT - Closing Collaborati

Card Number:

xxxxxxxxxxxxxxxxxx

Card Exp(MM/YY):

▼

 /

▼

CSC:

xxxx 

First Name:

firstname

Last Name:

lastname

Address Line 1:

street address

Address Line 2:

(optional)

City, State:

city

 ,

▼

Zip Code:

xxxxx-xxxx

Phone Type:

▼

Phone Number:

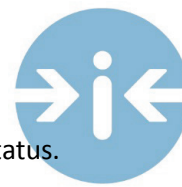
xxx-xxx-xxxx

Email:

name@email.com

Submit Transaction





Once back on the billing tab, click the *Refresh* button to see credit card status.

- Authorized – a valid credit card has been entered
- Not Authorized – an invalid credit card has been entered
- Locked – 4 failed credit card attempts have been made and account is locked. Contact RealEC Support to unlock.

Billing Preference

Credit Card

▼

Change Credit Card

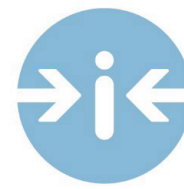
Refresh

Your Credit Card information has been successfully received and authorized.

Status: Authorized

Expiration Date: 02/2018





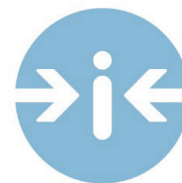
Select the *Financial Acknowledgement* checkbox to acknowledge the financial obligations to RealEC. Selecting the checkbox saves the UserID, date and time to the 3306 event.

Note: This checkbox must be selected the first time the billing information is input for the Update button to be active. If the checkbox is greyed out, a financial acknowledgement has already been sent to RealEC, and the Update button will be active.

☐ **Financial Acknowledgement***

RealEC will provide an invoice on a monthly basis for the fees and expenses. The invoiced amount must be paid in full on or prior to 30 calendar days after the date of each RealEC invoice. Failure to pay the amount due may impact your ability to participate on the RealEC Exchange and may incur additional charges.





The **Contacts** tab allows the user to update the company contact information. User can toggle between *Primary*, *Billing*, *Partner Approval*, *Technical* & *Outage* contact information by selecting the tabs on the top of the **Contacts** page. *Primary*, *Billing* and *Partner Approval* contacts are required and will prepopulate from the registration process.

Primary: Main company contact

Technical: System configurations

Billing: Billing contact

Outage: System outages

Partner Approval: Contact that will approve doing business with lenders that request to use this provider

Make necessary changes to selected tab contact information.

Click the **Update** button at the bottom of the page.

All fields marked with a red asterisk are required.

A green check mark shows when field is correctly completed.

Contacts

Contact Information

Primary

Billing

Partner Approval

Technical

Outage

Enter the contact information for the individual that should be notified if there are any customer service or customer relationship questions. Consider entering a key contact from your Customer Service Team or Business Development Team.

First Name

Main

✓

Middle Name

main

✓

Last Name

Contact

✓

Email

vijayakumar.sagiraju@realec.com

✓

Confirm Email

vijayakumar.sagiraju@realec.com

✓

Address Line 1

20E Greenway

✓

Address Line 2

dd

✓

City

Houston

✓

State

TX

▼

Zip

77046

✓

Contact Phone

999 999-9999

✓

Contact Fax

999 999-9999

✓

Extension

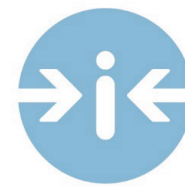
Extension

CANCEL

UPDATE

14

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The Users tab allows you to add new and edit current users. Admin user can edit users by selecting the **Modify** icon to the left of the username.

Users may be filtered by clicking the **Filter** icon and filtering by Username, First Name and/or Last Name in the text box that appears.

The **Display** column indicates if the user is visible in a Settlement Agent Search.

Users

ACTIVE

Filter

Modify	UserName	First Name	Last Name	Phone	Email	Status	Display
	Collab-Prov1	CollabProvider	User1	888 888-8888	pmk555krishna@gmail.com	Active	
	Collab-Prov2	CollabProvider	User2	999 999-9999	sjangama@realec.com	Active	
	Collab-Prov3	CollabProvider	User3	999 999-9999	pmk555krishna1@gmail.com	Active	
	Collab-Prov4	CollabProvider	User4	999 999-9999	muralikrishna.patcha@bkfs.co...	Active	
	Collab-Prov5	CollabProvider	User5	999 999-9999	sjangama@realec.com	Active	
	Collab-Prov6	CollabProvider	User6	999 999-9999	muralikrishna.patcha@bkfs.co...	Active	
	Collab-Prov9	CollabProviderr9	User	999 999-9999	vijayakumar.sagiraju@realec.c...	Active	
	kalaparathi	sai	krishna kalaparathi	121 212-1212	saikrishna.kalaparthi@realec.c...	Active	
	SA_396289	deepak	kollangode	111 111-1111	deepu1014@gmail.com	Active	
	SA_396313	sagiraju	vijayakumar	999 999-9999	sagiraju87@gmail.com	Active	

Total Items: 20

Page Size: 10

1 / 2

ADD USER

You may alternatively submit your new users in a file for our support team to process. Please contact support for appropriate file formats.

UPLOAD NEW USER FILE

PENDING

No records found!



Admin user can edit user by selecting the **Modify** icon to the left of the username.

The following items can be updated:

- First Name and Last Name
- Email and phone
- Visible in Settlement Agent Search
(checkbox – user will show in Settlement Agent Search)
- Primary Party (checkbox – indicates Party ID that Admin User is logged into is User's Primary Party)
- User Access (will vary based on Software Company)
 - Admin (Allows User to perform Administrative tasks)
 - Closing Insight Amend (User has access to the Accept/Revert popovers on the CI portal)
 - Closing Insight Edit (Can edit Closing Insight information and Accept/Revert)
 - Closing Insight View (View only access of Closing Insight portal)
 - Exchange Order Access All* (has access to view all orders for their PartyID(s))
 - Exchange Order Access My* (has access to view only their orders)
 - Exchange Order Edit (allows the user to accept and edit orders as needed, all functions allowed such as adding events, adding documents, etc)
- Reset Password (Resets user's password & unlocks user account. User will receive an email with a temporary password)
- Deactivate (Deactivates user account)

Click the **Save** or **Save & Close** button when done. *Save* will save your progress. *Save & Close* will save the information and close the window.

* *Exchange Order Access All or My* is view only access and must be combined with *Exchange Order Edit* in order for user to view and edit orders.

Exchange Order Access All	Exchange Order Access My	Exchange Order Edit	User Access
X			has access to view all orders for their PartyID(s)
	X		has access to view only their orders
X		X	allows the user to view and accept/edit all orders for their PartyID(s)
	X	X	allows the user to view and accept/edit only their orders



EDIT USER

Update User Information: CIDvtProv

First Name
Closing Collab ✓

E-Mail
vijayakumar.sagiraju@realec.com ✓

Last Name
Providerr ✓

Confirm Email
vijayakumar.sagiraju@realec.com ✓

Phone
995 962-2223 ✓

☒ Primary Party
☒ Visible in Settlement Agent Search

User Access

Access Permissions	Select
Admin	☒
Closing Insight Amend	☒
Closing Insight Edit	☒
Closing Insight View	☒
Exchange Order Access All	☒
Exchange Order Access My	☒
Exchange Order Edit	☒

Total Items: 7 Page Size: 10 1 / 1

RESET PASSWORD DEACTIVATE

CANCEL SAVE SAVE & CLOSE



Add Users

The **Add Users** section is in the middle of the **Users** page between current and pending user lists.

New Users must be invited to participate in the RealEC Exchange community. Complete the required information and they will receive a link to confirm their personal information and their security credentials.

Enter applicable information for each new user. All required fields are marked with a red asterisk.

Select User access by checking the box next to the access you would like to grant.

Note: Access permissions will vary based on your Software Company.

Admin – User has Admin capabilities

Closing Insight Amend – User has access to the Accept/Revert popovers on the CI portal

Closing Insight Edit – Can edit Closing Insight information and Accept/Revert

Closing Insight View - View only access of Closing Insight portal

Exchange Order Access All* - has access to view all orders for their PartyID(s)

Exchange Order Access My* - has access to view only their orders

Exchange Order Edit – allows the user to accept and edit orders as needed, all functions allowed such as adding events, adding documents, etc.

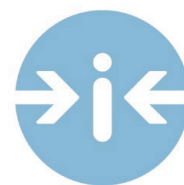
* *Exchange Order Access All or My* is view only access and must be combined with *Exchange Order Edit* in order for user to view and edit orders.

Exchange Order Access All	Exchange Order Access My	Exchange Order Edit	User Access
X			has access to view all orders for their PartyID(s)
	X		has access to view only their orders
X		X	allows the user to view and accept/edit all orders for their PartyID(s)
	X	X	allows the user to view and accept/edit only their orders

Click the **Save** or **Save & Close** button when done. *Save* will save your progress. *Save & Close* will save the information and close the window. User will receive an email to complete the registration process.

A list of pending user invitations can be found at the bottom of the User page.





ADD USER

New users must be invited to participate in the RealEC Exchange community. Complete the required information below to send an invitation to confirm their personal information and their security credentials. After they complete registration they will appear in the list of active users.

First Name

 *

E-Mail

 *

Last Name

 *

Confirm Email

 *

Phone

 *

The phone number is used as part of the process to validate the user's identity. Please ensure this is known by the user.

Select the initial roles that will be assigned to the user.

Access Permissions	Select
Total Items: 8 Page Size: 10 1 / 1	

CANCEL

SAVE

SAVE & CLOSE



Products

The **Products** page displays a list of your current products along with a view of the state and county for each product. *My Products* is set up based on your *Software Company* selection during registration.

Remove products for your PID list of available product offerings by clicking the “X” in the *Remove* column next

Products

My Products

The listed products have been added to your company. If you need to add new or updated products in your jurisdiction, select the products in Product Setup below.

[Filter](#)

Remove	Product Type	Product Description	State	County
[X]	Title	Commitment/Prelim Rpt	All States	All Counties
[X]	Closing/Escrow	Document Filing	All States	All Counties
[X]	Closing/Escrow	Commercial Closing	All States	All Counties
[X]	Closing/Escrow	Closing & Escrow Services	Arizona	Cochise
[X]	Closing/Escrow	Closing & Escrow Services	Texas	All Counties
[X]	Closing/Escrow	Closing & Escrow Services	Federated States of Mi...	
[X]	Closing/Escrow	Courtesy Closing	All States	All Counties
[X]	Closing/Escrow	Document Signing Service	All States	All Counties
[X]	Closing/Escrow	Sub-Escrow	All States	All Counties
[X]	Title	ALTA Jr Title Policy	All States	All Counties

Total Items: 1864

Page Size: 10 / 187

to the Product you wish to remove from *My Products*.

To add a product, select the Product Type, Product Code, State & County, then click *Apply*.

Product Setup

Select the Products by type and description that your company offers in each state and county, then click Apply.

Product Type

Closing/Escrow

State

TX

Product Code

Attorney Closing w/Funding
Close By Phone
Close by Phone w/Funding
Closing & Escrow Services
Closing Service Mail Away
Closing w/Property Rpt
Commercial Closing
Construction Disbursement Services
Courtesy Closing
Doc Filing - Insurance Cert

County

All Counties
Anderson
Andrews
Angelina
Aransas
Archer
Armstrong
Atascosa
Austin
Bailey

Product Description

On Residential transactions, the lender obtains title evidence. Closing agent handles title compliance, payoffs, disbursements along with proper ID and execution of the documents at closing. Certain portions of the above may be performed by a party other than the lender or the closing agent.

APPLY



Notifications

The **Notifications** page is used to view, add or change event notifications. The list of current email notifications is displayed along with any integration notifications set up by your Software Company selection during registration.

Notifications

ADD DELIVERY LOCATION

Current Events / Notifications

The following Integration events are currently set for your account. RealEC provides users the option to receive event email notifications. To add event email notifications, click ADD DELIVERY NOTIFICATION. To edit or remove event email notifications, click EDIT. To remove all email notifications, click REMOVE ALL.

Email

Delivery 1:
Default Address: sandeep.padam@bkfs.com

EDIT

REMOVE ALL

Event	Product Type
Closing Instructions (431)	Closing/Escrow
Closing Statement Distributed (435)	Closing/Escrow
Closing Statement Modifications Requested (432)	Closing/Escrow
Comment (220)	Closing/Escrow
Service Received (100)	Closing/Escrow

Add Event Notifications

Click the **Add Delivery Location** button located at the top or bottom of the page to add notifications.

Notifications

ADD DELIVERY LOCATION

Current Events / Notifications

The following Integration events are currently set for your account. RealEC provides users the option to receive event email notifications. To add event email notifications, click ADD DELIVERY NOTIFICATION. To edit or remove event email notifications, click EDIT. To remove all email notifications, click REMOVE ALL.

Under the *Delivery Options* section, enter the email address of the user in the blank field and confirm.

Note: Check the box next to *Use User Email Address on Order* if the notification should always go to the person that placed the order.

Under the *Notifications* section, select the desired *Product Types* and *Events* and then click the **Add** button. Click the **Save** button at the top or bottom of the page when done.

Notifications

SELECT EVENT / ENTER EMAIL

CANCEL

SAVE

Delivery New: Email

The following status events are available for viewing on RealEC's web site. RealEC can also provide email notifications when these events occur. Please select the events you would like notifications for from the table below.

DELIVERY OPTIONS

Send all selected notifications to the following email address

*

Confirm Email

*

☐ Use user email address on Order

NOTIFICATIONS

Product Types

▼

Events

▼

ADD

Filter

Event Description

Total Items: 0

Page Size: 10

1

/ 1

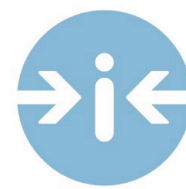
CANCEL

SAVE

21



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Modify Existing Event Notifications

Click **Edit** next to the email that you need to modify.

Click **Remove** to remove the email address from notifications.

Email

Delivery 1: Email

Default Address: dena.krolczyk@realec.com

EDIT

REMOVE

Event	Product Type
Comment (220)	Automated Valuations

Add events by selecting the *Product Type* and *Event* from the dropdowns and clicking **Add**.

Remove events by selecting the checkbox next to the event and clicking **Remove Selected**.

Use the filter option to narrow your search.

Click **Save** when done.

Notifications

SELECT EVENT / ENTER EMAIL

CANCEL

SAVE

Delivery 1: Email

The following status events are available for viewing on RealEC's web site. RealEC can also provide email notifications when these events occur. Please select the events you would like notifications for from the table below.

DELIVERY OPTIONS

Send all selected notifications to the following email address

sandeep.padam@bkfs.com

✓

Confirm Email

*

☐ Use user email address on Order

NOTIFICATIONS

Product Types

Events

ADD

▼ Filter

Select	Product Description	Event Description
☐	Closing/Escrow	Closing Instructions (431)
☐	Closing/Escrow	Closing Statement Distributed (435)
☐	Closing/Escrow	Closing Statement Modifications Requested (432)
☐	Closing/Escrow	Comment (220)
☐	Closing/Escrow	Service Received (100)

Total Items: 5

Page Size: 10 / 1

REMOVE SELECTED

CANCEL

SAVE



License

The License tab allows the Admin User to update the license information, organized by product.

Use the filter option to narrow your search.

Uncheck the box in the *Active* column to deactivate the license on a product. Click **Update** when done.

Click the *Modify* icon to the left of the Product you wish to change License Information on.

Click *Add License* to add a license to a product.

License

Current License Information

Filter

Modify	Product	State	County	License Level	License Number	Exp.Date	Active
	Closing/Escrow	TX	[All Counties]	Certified General Appraiser	23948293845	06/03/2015	☒

Total Items: 1

Page Size: 10

1

/ 1

ADD LICENSE

UPDATE

Modify License Information

Enter License information and click **Continue**.

LICENSE INFORMATION

License Level

Certified General Appraiser

✓

Product

✓

State

TX

✓

County

All Counties

✓

License Number

23948293845

✓

Effective Date

06/03/2015

✓

Expiration Date

06/03/2015

✓

CANCEL

CLEAR FORM

CONTINUE

Add License

LICENSE INFORMATION

License Level

*

Product

Appraisal / eValuation

✓

State

*

County

*

License Number

*

Effective Date

08/10/2015

✓

Expiration Date

08/10/2015

✓

CANCEL

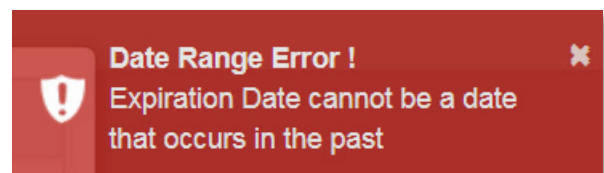
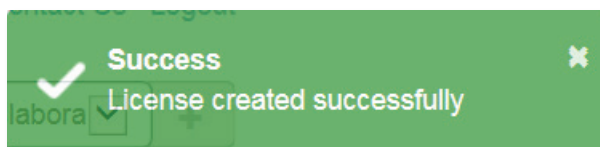
CLEAR FORM

CONTINUE

Enter License information and click **Continue**.

If successful, a green *Success* message will appear and License will be added to the Current License Information list.

A red *Error* message will appear with a description of any errors.



Insurance

The Insurance tab allows the Admin User to update the insurance policy information, organized by product.

Use the filter option to narrow your search.

Uncheck the box in the *Active* column to deactivate insurance on a product. Click **Update** when done.

Click the *Modify* icon to the left of the Product you wish to change insurance information on.

Insurance

Current Insurance Information

Filter

Modify	Product	State	County	Ins.Carrier	Policy#	Coverage	Exp.Date	Active
	Title	AZ	[All Counties]	Ins123	456	\$456	03/25/2015	Not Active
	Title	AZ	[All Counties]	Ins123	456	\$456	03/31/2015	☒

Total Items: 2

Page Size: 10

1

/ 1

Add Insurance

UPDATE

Click *Add Insurance* to add insurance to a product.

Modify Insurance

INSURANCE INFORMATION

Insurance Carrier test ✓	Product Appraisal / eValuat ✓	State NH ✓	County All Counties ✓
Policy Number efdfd4334 ✓	Policy Coverage Amount 34343 ✓	Effective Date 06/13/2015 ✓	Expiration Date 06/13/2015 ✓

CANCEL
CLEAR FORM
CONTINUE

Enter insurance information and click **Continue**.

Add Insurance

INSURANCE INFORMATION

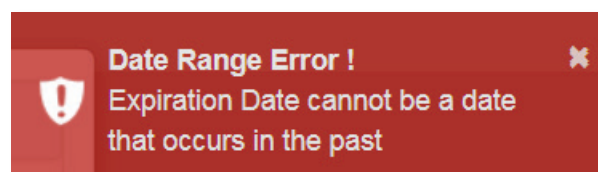
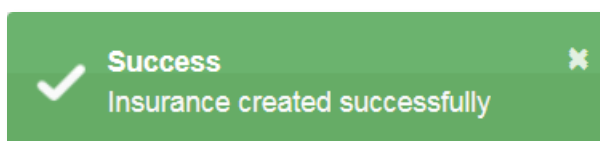
Insurance Carrier ✖	Product ✓ ✖	State ✓ ✖	County ✓ ✖
Policy Number ✖	Policy Coverage Amount ✖	Effective Date 08/11/2015 ✓	Expiration Date 08/11/2015 ✓

CANCEL
CLEAR FORM
CONTINUE

Enter insurance information and click **Continue**.

If successful, a green *Success* message will appear and insurance will be added to the Current Insurance Information list.

A red *Error* message will appear with a description of any errors.



Appendix

Revision	Date	Description	Author
1.0	4.2.2015	Initial	D. Krolczyk
1.1	6.2015	Edits to functionality and appearance	D. Krolczyk
1.2	6.29.15	Updates & enhancements	D. Krolczyk
1.3	8.11.15	Updates & enhancements	D. Krolczyk
1.4	8.25.15	Updates & enhancements	D. Krolczyk

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