



ATG LEGAL
EDUCATION



Overview of Lender Web Portals

January 19, 2016

Presented by:

- **Steven Lindberg**
Compliance Manager
Attorneys' Title Guaranty Fund, Inc.
- **Debra Egan**
Closing Services Manager
Attorneys' Title Guaranty Fund, Inc.

Lender Website Portals

CD Xchange

simplifile[®]



Quicken Loans
powered by  **nexsys**
Clear Path

 *LoanPort*

 SmartCLOSE



Website Portals 101: Who, What, and Why

- **BMO, Bank of America, Quicken, USAA, Wells Fargo, Guaranteed Rate, etc.**
- **Websites designed for Lenders by Third Party Technology Companies**
- **Secure Portals for Transmission of Documents, Figures, and Information**
- **File Tracking System**
- **Data Integration**



CD Xchange

- **Guaranteed Rate**
- **Preliminary Fee Collaboration**
- **Referrals are well in advance of the closing.**



CD Xchange

- Registration

- <https://cdxchange.guaranteedrate.com/index.html>

The screenshot shows the CD Xchange website interface. At the top, there is a dark navigation bar with 'CD Xchange' and 'Dashboard' on the left, 'Help' and a search bar on the right, and a green 'Login' button. Below this, a registration modal is open. It has three tabs: 'Sign In', 'Register' (which is selected), and 'Why?'. The 'Register' tab contains the following fields: 'Email:' with the value 'daffy.duck@disney.com', 'Password:' (empty), 'Re-Enter Password:' (empty), and a 'min. 6 Characters' note. A green 'Sign Up' button is at the bottom of the form. Below the form are 'Close' and 'Lost Password' buttons. A red arrow originates from the 'Register' tab and points to the 'Login' button in the top navigation bar.



CD Xchange

From: CD Xchange [mailto:do_not_reply@guaranteedrate.com]
Sent: Thursday, January 14, 2016 10:24 AM
To: Packages
Subject: Request for title fees for Joshua [REDACTED] 1/29/2016



You have been invited to collaborate on the Closing Disclosure for Joshua [REDACTED] for [loan # \[REDACTED\]](#) closing on 1/29/2016. To ensure that Guaranteed Rate is able to deliver the Closing Disclosure to you and the borrower(s) in the required timeline, please login as soon as possible to provide the applicable settlement charges associated with this loan.

First time CD Xchange users will need to register for an account. Should you have questions, visit our [help center](#) or email us at CDXchangesupport@guaranteedrate.com.

Thank you and we look forward to working with you.

[Click here to access CD Xchange](#)

[Click here to access CD Xchange](#)



CD Xchange

CD Xchange Dashboard Help Search Logout

Dashboard for figures@atgf.com

Loan #	Borrower	Purpose	Est. Closing	Status	Updated (local)	By	LO
		Purchase	2016-01-22	Submit to Agent	2016-01-14 10:26 am	encompass	Joseph Wilson
		Purchase	2016-02-05	Submit to Agent	2016-01-14 3:40 pm	encompass	Todd Marguerite
		Purchase	2016-02-12	Submit to Agent	2016-01-15 9:03 am	encompass	Tania Morgan



CD Xchange

Settlement Agent Charges Worksheet - Loan [REDACTED] as of 2016-01-15 7:11 am

Closing Information		Transaction Information		Loan Information	
Est. Closing Date	1/14/2016	Borrower	JAMES T [REDACTED]	Loan Term	30
Disbursement Date	1/15/2016			Purpose	Purchase
Settlement Agent	Attorney's Title Guaranty Fund	Seller	Mohammed [REDACTED]	Product	Fixed Rate
File #	[REDACTED]	Loan Officer	John Berger	Loan Type	Conventional
Property	[REDACTED]	Lender		GR Loan Number	[REDACTED]
BOLINGBROOK	IL 60440	Guaranteed Rate, Inc.		Loan Amount	\$92,925.00
County	Will			Property Type	Detached
Sales Price	\$123,900.00			Govt Case ID	



CD Xchange

Complete each section for all charges. Using the dropdown box for fee descriptions. Use the comment box below for any questions.

Division of Commissions		Borrower-Paid	Seller-Paid	Paid by-Others	Total
Fee Description	To				
Real Estate Commission					\$0.00
Real Estate Commission					\$0.00
Real Estate Commission					\$0.00
Title Charges		Borrower-Paid	Seller-Paid	Paid by-Others	Total
Fee Description	To				
Settlement Fee	ATG	\$1,150.00			\$1,150.00
Closing Fee					\$0.00
Escrow Fee					\$0.00
Closing Protection Letter	ATG	\$50.00	\$50.00		\$100.00
Abstract or Title Search Fee ▾					\$0.00
Chain of Title ▾	ATG	\$150.00			\$150.00
Stamp Pickup Fee ▾	ATG	\$25.00	\$25.00		\$50.00
Courier Fee ▾	ATG	\$25.00			\$25.00
Doc Mailback fee ▾	ATG	\$10.00			\$10.00
Document Preparation Fee ▾	ATG	\$50.00			\$50.00
State of IL Policy Fee ▾	ATG	\$3.00	\$3.00		\$6.00
Gap Fee ▾	ATG/MEMBER	\$75.00	\$75.00		\$150.00
ILAPLD ▾	ATG	\$100.00			\$100.00

Add New Fee



CD Xchange

Title Insurance Policy Charges		Borrower-Paid	Seller-Paid	Paid by-Others	Total
Fee Description	Policy limit				
Owner's Title Insurance	123,900		\$975.00		\$975.00
Lender's Title Insurance	92,925	\$490.00			\$490.00

Government Recording and Transfer Charges		Borrower-Paid	Seller-Paid	Paid by-Others	Total
Fee Description	To				
Mortgage Recording					\$0.00
Deed Recording					\$0.00
Transfer Taxes					\$0.00
City/County Stamps					\$0.00
State Tax/Stamps					\$0.00

Add New Fee

Additional Settlement Charges		Borrower-Paid	Seller-Paid	Paid by-Others	Total
Fee Description	To				

Add New Fee

Adjustments			
Description		Borrower	Seller
Sale price of any personal property included in Sale			
Adjustments for items Paid by Seller in Advance			
City/town Taxes	▼ to ▼		
County Taxes	▼ to ▼		
Assessments	▼ to ▼		

Add New Fee

L. Paid Already by or on Behalf of Borrower at Closing		N. Due from Seller at Closing	
Deposit		Excess Deposit	
Existing Loan(s) Assumed or Taken Subject to		Existing Loan(s) Assumed or Taken Subject to	
		Payoff of First Mortgage	
		Payoff of Second Mortgage	



CD Xchange

Description	Borrower	Seller
Adjustments for items Unpaid by Seller		
City/town Taxes	to	
County Taxes	to	
Assessments	to	

Add New Fee

Contact Information				
	Lender	Real Estate Broker (B)	Real Estate Broker (S)	Settlement Agent
Name	Guaranteed Rate, Inc			
Address	600 22nd Street Suite 100 Oak Brook, IL 60523			
NMLS ID	2611			
State License ID	MB.0005932			
Contact	John Berger			
Contact NMLS ID	755909			
Contact State License ID	IL - 031.0033448 - MB.0005932			
Email	john.berger@guaranteedrate.com			packages@atgf.com
Phone	6308690002			

Notes	
2016-01-12 7:45 am	packages@atgf.com first opened loan trident v2

Status	
2016-01-11 5:34 pm	Submit to Agent encompass v1

Comments/Questions...

Add Note

Show differences to previous version with a green background. Hover for previous value.

Status:

Save

Undo

Document Version:



Nexsys

- **Quicken Loans**
- **Preliminary Fee Collaboration**
- **Document Sharing**
- **Action Items provide guidance on what needs to be completed.**



Nexsys

- <https://www.nexsysclearpath.com/QuickenLoans>



[Learn More](#) | [Helpful Tools](#) | [Create an Account](#) | [Sign In](#)

- **Company information should be your own, not ATG.**
- **REsource users should choose “RamQuest” as the title software provider.**



Nexsys

Orders to Accept

Nothing to see here!

My Orders

In Closing (2)

Property Address: [REDACTED] Winnetka, IL 60093	Borrower Name(s): Barbara [REDACTED] Gary [REDACTED]	Scheduled Signing Date: Friday, January 15, 2016
Action Needed		File Number: 150139800731

Property Address: [REDACTED] McHenry, IL 60050	Borrower Name(s): Matthew [REDACTED]	Scheduled Signing Date: Monday, January 25, 2016
Action Needed		File Number: 150283400022

In Process (8)

Property Address: [REDACTED] Joliet, IL 60432	Borrower Name(s): William [REDACTED]	Anticipated Signing Date: Friday, January 15, 2016
Action Needed		File Number: 150113400721



Nexsys

Action Needed

Order Details



Fees

Documents

Contacts

[Redacted] **Aurora, IL 60506**

Borrower Name(s):

Denise [Redacted]

Anticipated Signing Date:

February 26, 2016

File Number:

140297346839

Loan Purpose:

Purchase

Loan Amount:

\$108,989.00

Loan Number:

[Redacted]

Terms:

FHA - 30 yr Fixed

Funding Number:

Action Needed

New

Upload the lender's title commitment documentation, including the 12-month Chain of Title, the most recent warranty deed, and the title invoice.

[Upload](#)

Review and update fees.

[Update](#)

Complete a final review of fees.

[Update](#)

Upload the seller's Closing Disclosure Acknowledgement.

[Upload](#)

Upload the seller's Closing Disclosure.

[Upload](#)



Nexsys

■ Primary Action Items

– Pre-Closing

- Complete a final review of fees.
- Provide the closing order details.
- Provide the finalized general order details.
- Provide the general order details.
- Review and update fees.
- Upload the Closing Protection Letter.
- Upload the lender's title commitment documentation, including the 12-month Chain of Title, the most recent Warranty Deed, and the Title Invoice.
- Upload the seller's Closing Disclosure.
- Upload Wire Instructions.



Nexsys

- **Primary Action Items**

- Closing

- Upload the critical funding documents.
 - Upload the seller's Closing Disclosure Acknowledgement.



Nexsys: Updating Fees

Action Needed	Order Details	Fees	Documents	Contacts
---------------	---------------	------	-----------	----------

Aurora, IL 60506

Borrower Name(s):

Denise

Anticipated Signing Date:

February 26, 2016

File Number:

140297346839

Loan Purpose:

Purchase

Loan Amount:

\$108,989.00

Loan Number:

Terms:

FHA - 30 yr Fixed

Funding Number:

Action Needed

New

Upload the lender's title commitment documentation, including the 12 month Chain of Title, the most recent warranty deed, and the title invoice.	Upload
Review and update fees.	Update
Complete a final review of fees.	Update
Upload the seller's Closing Disclosure Acknowledgement.	Upload
Upload the seller's Closing Disclosure.	Upload



Nexsys: Updating Fees

Fees

[View Printable Version](#)

The sections you see below will be used to prepare the closing disclosure.
Please review and update these fees as needed.

[Submit](#)

Origination Charges	Broker Fee	\$1,874.51	Comment
Services Borrower Did Not Shop For	Underwriting Fee	\$765.00	Comment
Services Borrower Did Shop For			
Taxes and Other Government Fees			
Prepays			
Initial Escrow Payment at Closing			
Other			
Total Closing Costs			



Nexsys: Updating Fees

Fees

[View Printable Version](#)

The sections you see below will be used to prepare the closing disclosure.
Please review and update these fees as needed.

[Submit](#)

Origination Charges	Appraisal Fee	\$310.00	Comment
Services Borrower Did Not Shop For	Appraisal Management Services	\$150.00	Comment
Services Borrower Did Shop For	Credit Report	\$18.48	Comment
Taxes and Other Government Fees	Express Mail/Courier Fee	\$35.00	Comment
Prepays	Flood Determination Fee	\$10.50	Comment
Initial Escrow Payment at Closing	Flood Life of Loan Coverage	\$5.00	Comment
Other	Tax Certification Fee	\$18.00	Comment
Total Closing Costs	Upfront Mortgage Insurance Premium	\$1,874.52	Comment



Nexsys: Updating Fees

Fees

[View Printable Version](#)

The sections you see below will be used to prepare the closing disclosure.
Please review and update these fees as needed.

Submit

Origination Charges	+ Add Fee		
Services Borrower Did Not Shop For	Title-Abstract or Title Search	\$185.00	Edit
Services Borrower Did Shop For	Title-Attorney's Fees	\$650.00	Edit
Taxes and Other Government Fees	Title-Closing Protection Letter	\$50.00	Edit
Prepays	Title-Document Preparation Fee	\$75.00	Edit
Initial Escrow Payment at Closing	Title-IL Title Policy Fee	\$3.00	Edit
Other	Title-Lender's Title Policy (TRID Value)	\$1,600.00	Edit
Total Closing Costs	Title-Settlement or Closing Fee	\$1,150.00	Edit
	Title-Tax Service Fee (Closing Agent)	\$25.00	Edit



Nexsys: Updating Fees

Fees

[View Printable Version](#)

The sections you see below will be used to prepare the closing disclosure. Please review and update these fees as needed.

[Submit](#)

Origination Charges
Services Borrower Did Not Shop For
Services Borrower Did Shop For
Taxes and Other Government Fees
Prepays
Initial Escrow Payment at Closing
Other
Total Closing Costs

[+](#) Add Fee

Recording Fee-Deed	\$57.00	Edit
Recording Fee-Mortgage *	\$68.00	Edit
Transfer Taxes-Local-Deed	\$55.50	Edit
Transfer Taxes-State-Deed	\$111.00	Edit

* Recording Fee-Mortgage includes 19 pages: 17 for the mortgage, 1 for the riders and 1 for the legal description.



Nexsys: Updating Fees

Fees

[View Printable Version](#)

The sections you see below will be used to prepare the closing disclosure.
Please review and update these fees as needed.

[Submit](#)

Origination Charges	Homeowners Insurance Premium	\$600.00	Comment
Services Borrower Did Not Shop For	Prepaid Interest	\$44.80	Comment
Services Borrower Did Shop For			
Taxes and Other Government Fees			
Prepays			
Initial Escrow Payment at Closing			
Other			
Total Closing Costs			



Nexsys: Updating Fees

Fees

[View Printable Version](#)

The sections you see below will be used to prepare the closing disclosure.
Please review and update these fees as needed.

[Submit](#)

Origination Charges	Homeowner's Insurance	\$150.00	Comment
Services Borrower Did Not Shop For	County Taxes	\$1,438.29	Comment
Services Borrower Did Shop For	Aggregate Acct. Adjustment	(\$299.98)	Comment
Taxes and Other Government Fees			
Prepays			
Initial Escrow Payment at Closing			
Other			
Total Closing Costs			



Nexsys: Updating Fees

Fees

[View Printable Version](#)

The sections you see below will be used to prepare the closing disclosure.
Please review and update these fees as needed.

[Submit](#)

Origination Charges
Services Borrower Did Not Shop For
Services Borrower Did Shop For
Taxes and Other Government Fees
Prepays
Initial Escrow Payment at Closing
Other
Total Closing Costs

[+](#) Add Fee

MI Paid in Cash	\$0.52	Edit
Title-Owner's Title Policy (TRID Value)	\$490.00	Edit



Nexsys: Updating Fees

Fees

[View Printable Version](#)

The sections you see below will be used to prepare the closing disclosure.
Please review and update these fees as needed.

Submit

Origination Charges	Yield Spread Premium Credit	\$2,750.88
Services Borrower Did Not Shop For		
Services Borrower Did Shop For		
Taxes and Other Government Fees		
Prepays		
Initial Escrow Payment at Closing		
Other		
Total Closing Costs		



Nexsys: Updating Fees

Simultaneous Title Breakdown

We heard your feedback, and we're making a few improvements to this section. In the meantime, you can expect a phone call from our team to finalize the Simultaneous Title Breakdown.

Cash-to-Close Breakdown

Total Closing Costs (J)	\$8,762.74
Closing Costs Paid Before Closing	\$0.00
Closing Costs Financed	\$0.00
Down Payment/Funds from Borrower	\$2,011.00
Earnest Money Deposit	(\$1,000.00)
Funds for Borrower	\$0.00
Seller Credits	(\$6,290.00)
Adjustments and Other Credits ▾	(\$2,212.78)
Cash to Close	\$1,270.96

[Comprehensive Fee History](#)

By checking this box, I'm confirming that these fees are able to be used as is on the Closing Disclosure.

Submit



Nexsys: Uploading Documents

Action Needed	Order Details	Fees	Documents	Contacts
---------------	---------------	------	-----------	----------

Aurora, IL 60506

Borrower Name(s):

Denise

Anticipated Signing Date:

February 26, 2016

File Number:

140297346839

Loan Purpose:

Purchase

Loan Amount:

\$108,989.00

Loan Number:

Terms:

FHA - 30 yr Fixed

Funding Number:

Action Needed

New

Upload the lender's title commitment documentation, including the 12-month Chain of Title, the most recent warranty deed, and the title invoice.

[Upload](#)

Review and update fees.

[Update](#)

Complete a final review of fees.

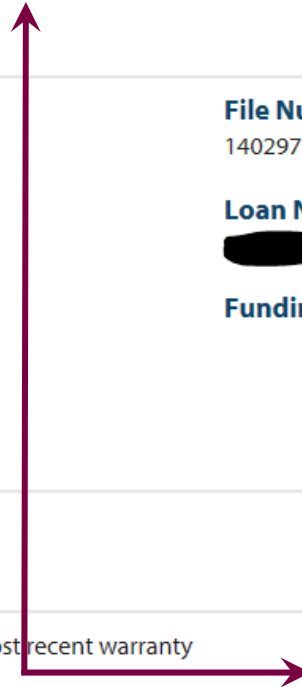
[Update](#)

Upload the seller's Closing Disclosure Acknowledgement.

[Upload](#)


Upload the seller's Closing Disclosure.

[Upload](#)



Nexsys: Uploading Documents

Documents



Drag and Drop Files to Upload
or

Choose Files

Agent Uploads

WIRING INSTRUCTION.pdf	Wiring instructions	01/14/2016 12:28 p.m. ET	Download
140297346839.....095045_1.pdf	Closing Protection letter	01/14/2016 12:27 p.m. ET	Download

Quicken Loans Uploads

No documents to show here!



Nexsys: Uploading Documents

Please describe your document(s). ×

Nexsys Document Example.pdf

Title Commitment & Invoice

74 characters left

Next



Nexsys: Uploading Documents

What are you uploading? Select all that apply. ×

- Upload the lender's title commitment documentation, including the 12-month Chain of Title, the most recent warranty deed, and the title invoice.
- Upload wire instructions.
- Upload the Closing Protection Letter.
- Upload the seller's Closing Disclosure Acknowledgement.
- Upload the seller's Closing Disclosure.
- Other

Submit




Nexsys: Contacts

Action Needed	Order Details 	Fees	Documents	Contacts
---------------	---	------	-----------	----------

 Aurora, IL 60506

Borrower Name(s):

Denise 

Anticipated Signing Date:

February 26, 2016

File Number:

140297346839

Loan Purpose:

Purchase

Loan Amount:

\$108,989.00

Loan Number:



Terms:

FHA - 30 yr Fixed

Funding Number:



Action Needed

New

Upload the lender's title commitment documentation, including the 12-month Chain of Title, the most recent warranty deed, and the title invoice.

[Upload](#)

Review and update fees.

[Update](#)

Complete a final review of fees.

[Update](#)

Upload the seller's Closing Disclosure Acknowledgement.

[Upload](#)

Upload the seller's Closing Disclosure.

[Upload](#)



Nexsys: Contacts

Contacts

If any of this information is missing or incorrect, reach out to your primary contact to have it updated.

Quicken Loans Primary Contact

Closing Coordinator:

Jeremy Olsen

Phone:

800-226-6308 Ext. 33012

Email:

JeremyOlsen@quickenloans.com

Funding Analyst:

[REDACTED]

Phone:

Email:

Hotline Support Number:

800-719-6133 Ext. 12567



Nexsys: Contacts

Contacts

If any of this information is missing or incorrect, reach out to your primary contact to have it updated.

Quicken Loans Primary Contact

Closing Coordinator:

Matthew Cristiano

Phone:

800-226-6308 Ext. 30104

Email:

MatthewCristiano@quickenloans.com

Funding Analyst:

Yolanda Murrie

Phone:

313-373-9049 Ext. 39049

Email:

YolandaMurrie@quickenloans.com

Hotline Support Number:

800-226-6308 Ext. 12567



Honorable Mentions

- **RealEC**

- Bank of America
- BMO Harris
- PNC
- USAA
- Wells Fargo

- **Smart Close**

- MB Financial

- **Simplifile**

- Country Bank
- Loan Depot
- Mortgage Masters
- Sierra Pacific Mortgage

- **Loan Port**

- Regions Mortgage





ExchangeTM

Powered by RealEC[®]

RealEC Exchange User Guide for Lenders

This user guide is intended for clients that will use the RealEC Exchange for product orders.



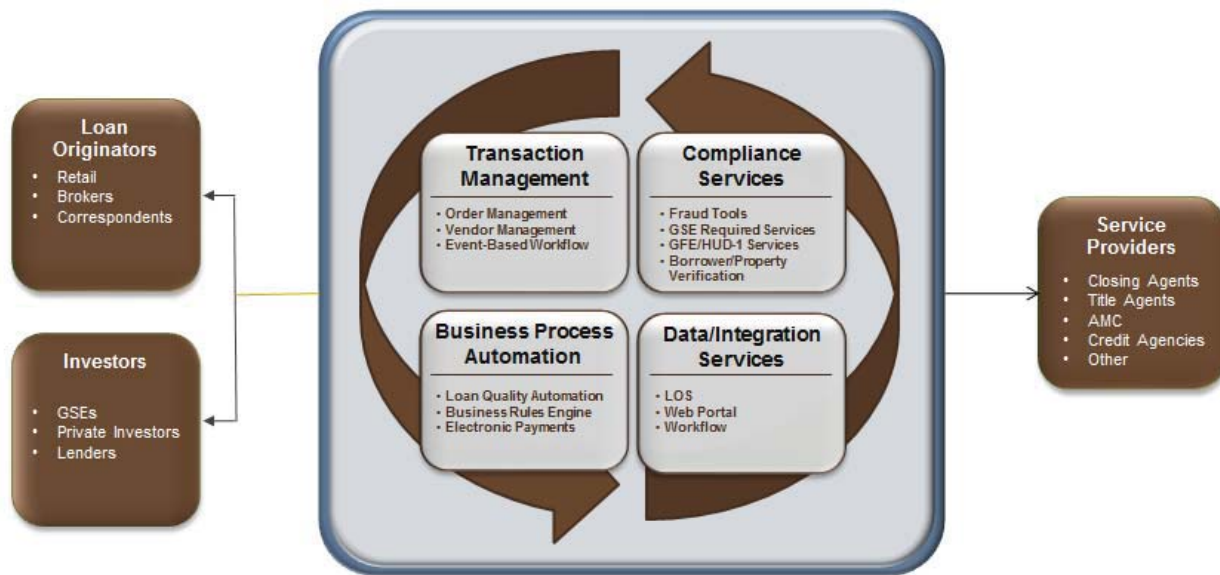
Contents

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What is the Exchange?

The Exchange is a proven, scalable technology platform that enables both efficiency and compliance with loan quality requirements as well as providing the distinct advantage lenders need to meet today's origination challenges and government mandated regulations.



This comprehensive, Web-based platform supports a lender's established loan quality programs to help minimize loan repurchase and drive efficiencies in the mortgage transaction. As an open platform connecting lenders with their choice of business partners, the Exchange website provides data aggregation, workflow management, centralized product ordering, and tracking for all services that are required during the loan origination process.



Process Efficiencies

You'll notice several process upgrades to the Exchange website. These enhancements will improve your efficiency and equate to time less spent placing orders.

General Features

- Larger text and white space throughout the Exchange website make the site easier to read and navigate.
- More advanced search options allow you to customize your results more efficiently.
- Search result columns may be sorted with one click, allowing you to locate orders faster.
- Search results may be downloaded in an Excel format, making them easily digestible by your systems.

Creating a New Order

- The Exchange allows you to review the order data prior to placing the order so you can catch any data inaccuracies before the order is processed.
- Allows you to review the product code and provider chosen for the order prior to order placement.
- New Order workflow allows you to move backwards to a section to make changes. Moving back in an order doesn't mean you lose information placed on later pages; all information entered is saved so that you may avoid duplicating data entry.

Existing Orders

- The Exchange offers a cleaner, easier Order Dashboard for users to quickly locate an existing order.
- Summary pages for individual orders offer color coded order status and order events to alert you to issues within the order (ex: events that require immediate attention appear in red)
- Tab layouts within the Summary page makes navigation easy, with Events and Documents listed on their own tabs for better organization.



The Meaning of User Configurations

Users within the Exchange website have many product options that are configured for their unique login ID, like having a key crafted to open a particular door. These options range from types of products a user can order, to the service providers the user can choose for a particular product, to performing specific functionality on the Exchange.

If you do not see a particular function, product or provider available to you when navigating the Exchange, contact your company RealEC Administrator for further assistance. Chances are your user configurations will require updates to access the desired results.

The Meaning of Event Color Coding

Color coding is the same for the Event status and Status box; the functionality between the Event status and Status box are mutually exclusive. The status box is color coded to provide a visual cue to users deciphering which statuses require attention.

Valid event status and status box colors are:

- **Red** Indicates “Reader must act”
- **Yellow** Indicates “Action may be required (present or future)”
- **Blue** Indicates “Informative only”
- **Green** Indicates “Success Process Diagrams”

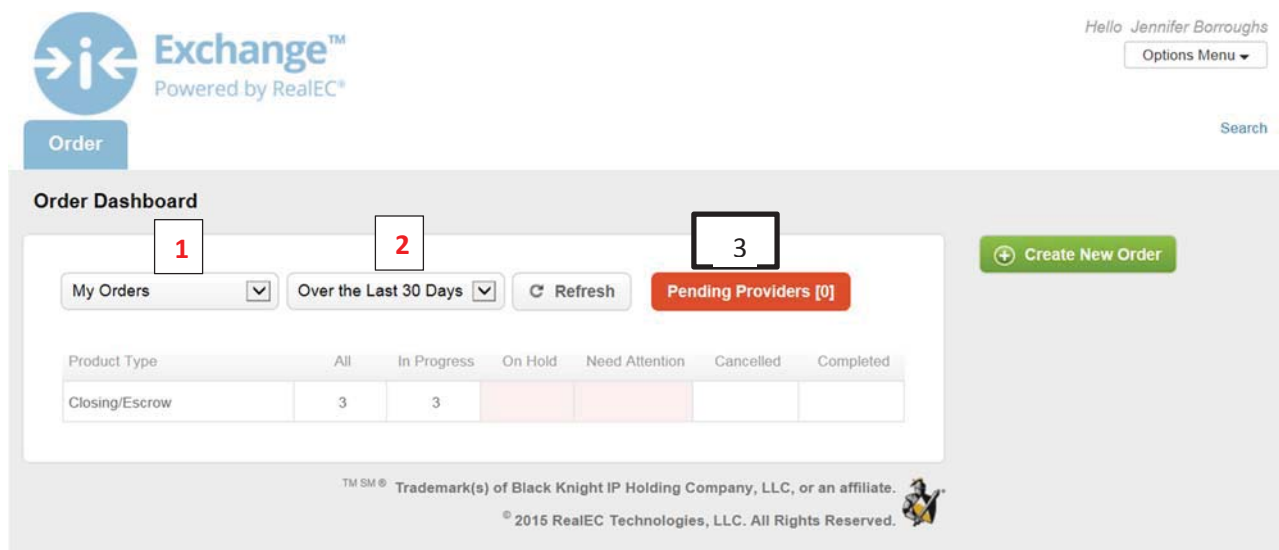


Navigating the Order Dashboard

Existing orders within the Exchange website can be located in two ways: using the robust search functionality (see next section Searching for Existing Orders), or by using the Order Dashboard.

Order Dashboard results can be expanded using the filters above the dashboard:

- 1) Orders Filter – allows the user to expand the dashboard results to all orders within the user's branch (if the user is configured to view all branch orders)
- 2) Date Range Filter – allows the user to expand the dashboard results with preset 30, 60 or 90 day date ranges
- 3) Pending Providers Filter - The Pending Providers Dashboard displays all Title, Closing & Doc Signing orders that are pending because the Provider has not yet completed registration. You can send a reminder email to the Provider, change the Provider for an Order, or cancel the Entire Order.



Order Dashboard

1 2 3

My Orders Over the Last 30 Days Refresh Pending Providers [0]

Product Type	All	In Progress	On Hold	Need Attention	Cancelled	Completed
Closing/Escrow	3	3				

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The Order Dashboard provides links to recently placed orders. These links are the number of orders that fit the grid criteria, and are organized by Product Type then further divided by Order Status.

Click the number that appears within the criteria combination to display a list of orders that meet that criteria.

To access the Order Summary page for an order, click the Transaction Number that appears in the first column of the results set:

Order Search

Search Results

Searched:

Dashboard Source **My Orders** Product Type **Closing/Escrow**
 Date Range **Over the Last 30 Days** Status **All**

3 matches found.

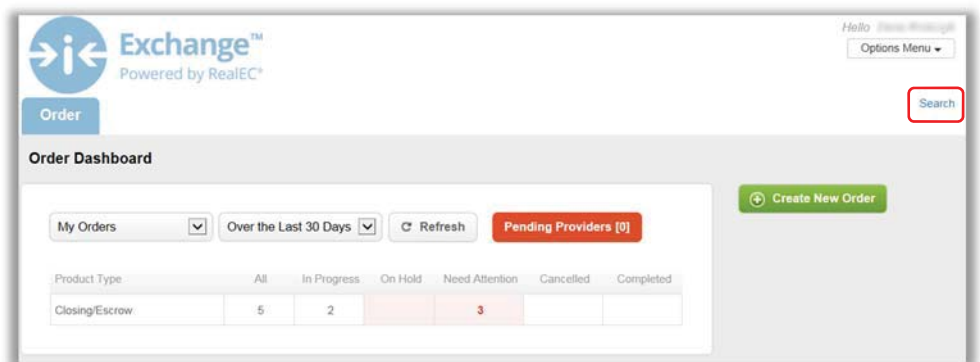
Transaction Number	Sequence ID	Doc	Date Ordered	Current Status	Borrower Name	Loan Number	Provid
13477167-10677843	1		11/17/2015 1:24:27 PM	Confirmed	Michael Jones	STG20150516	12
13477167-10678267	1		11/18/2015 12:12:47 PM	Curative Cleared	Michael Jones	STG20150516	456
13477167-10678286	1		11/18/2015 1:17:33 PM	Modifications Complete	Michael Jones	STG20150516	12

Searching for Existing Orders

In addition to locating existing orders within the Order Dashboard, orders can also be located using the Search feature.

Step 1: Click the Search link at the top right of the page. The Search page will display.

Step 2: Input the applicable search criteria.



Exchange™ Powered by RealEC®

Order Hello [View Profile](#)
Options Menu

Order Dashboard Search

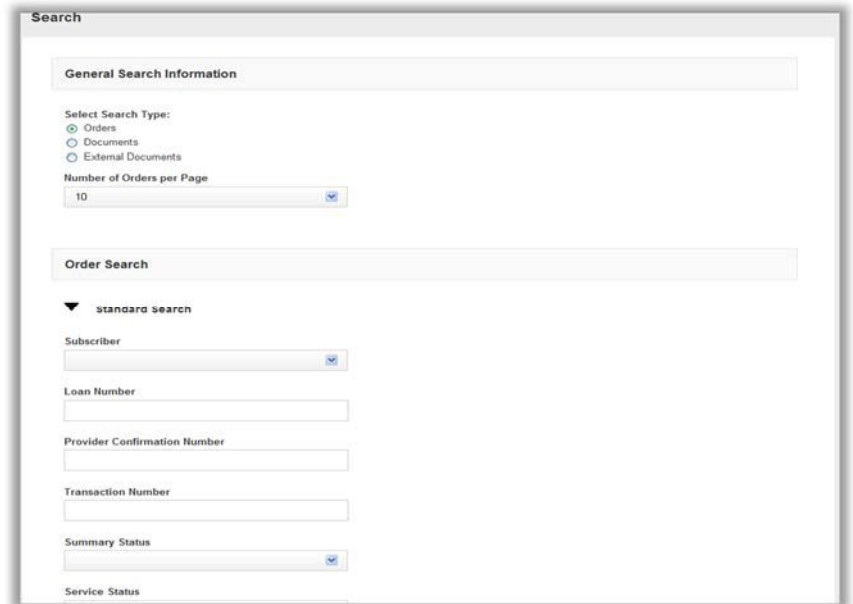
My Orders Over the Last 30 Days Pending Providers [0]

Product Type	All	In Progress	On Hold	Need Attention	Cancelled	Completed
Closing/Escrow	5	2		3		

You may choose to search for Orders or Documents. You may also select the number of orders that display per page.

Input specific search criteria such as Transaction Number or Loan Number, into the appropriate fields.

Click Search at bottom of page.



Search

General Search Information

Select Search Type:

- Orders
- Documents
- External Documents

Number of Orders per Page: 10

Order Search

▼ standard search

Subscriber: [dropdown]

Loan Number: [text box]

Provider Confirmation Number: [text box]


Transaction Number: [text box]

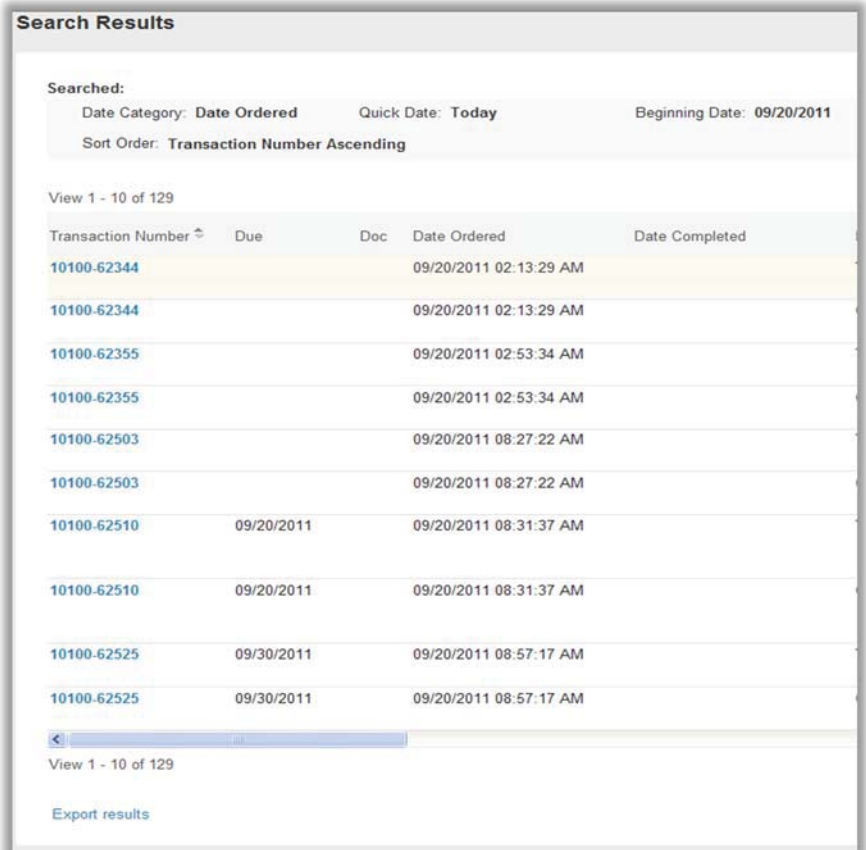
Summary Status: [dropdown]

Service Status: [text box]

Step 3: The applicable order(s) will be shown on the Search results page.

From the Search results page, you may:

- **Select the Transaction Number** to view the Order Summary page. From this page, the Event History for the order is displayed and the ability to add additional products and events can be accessed.
- **Check the due status of an order.** The due date appears in the Due column.
- **Select the document icon** in the Doc column to view or print the completed report. 
- **Check the progress** of an order using the Current Status column.
- **Download search results** into an Excel or Access spreadsheet by clicking Export Results at the bottom of the page.



Search Results

Searched:

Date Category: **Date Ordered** Quick Date: **Today** Beginning Date: **09/20/2011**

Sort Order: **Transaction Number Ascending**

View 1 - 10 of 129

Transaction Number	Due	Doc	Date Ordered	Date Completed
10100-62344			09/20/2011 02:13:29 AM	
10100-62344			09/20/2011 02:13:29 AM	
10100-62355			09/20/2011 02:53:34 AM	
10100-62355			09/20/2011 02:53:34 AM	
10100-62503			09/20/2011 08:27:22 AM	
10100-62503			09/20/2011 08:27:22 AM	
10100-62510	09/20/2011		09/20/2011 08:31:37 AM	
10100-62510	09/20/2011		09/20/2011 08:31:37 AM	
10100-62525	09/30/2011		09/20/2011 08:57:17 AM	
10100-62525	09/30/2011		09/20/2011 08:57:17 AM	

View 1 - 10 of 129

[Export results](#)



Placing a New Order

Depending on how your company is configured, you may or may not place a new order directly from our website. If your company does place a new order directly on our website, then these steps apply to you.

Step 1: Upon initial log-in, from the Order Dashboard page, click the **Create New Order** button.

Step 2: New Order Page

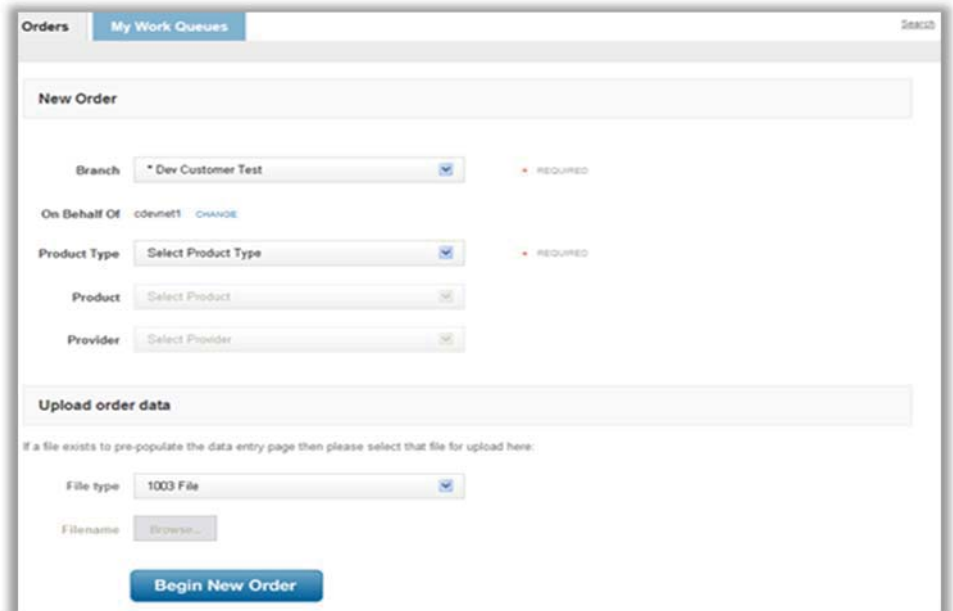
- Select the Branch, Product Type, Product and Provider.

Note: Product/Provider will be locked to “iSelect” if configured.

Upload order Data

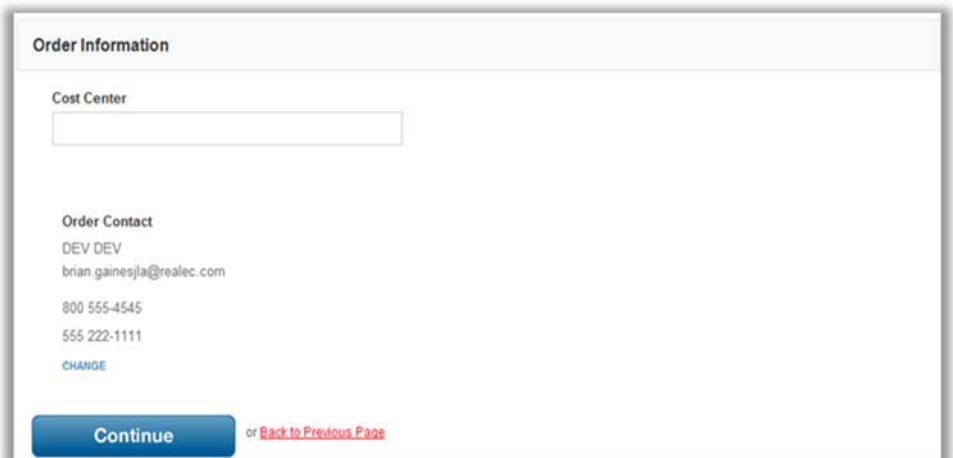
You can upload a Loan Application/1003 to the order – this will preload a lot of data saving you data entry time!

- To do so, select file type to *1003 File*
- Browse for the 1003 on your computer
- Upon receiving a “*Successful Upload*” pop-up, click on **Begin New Order**.



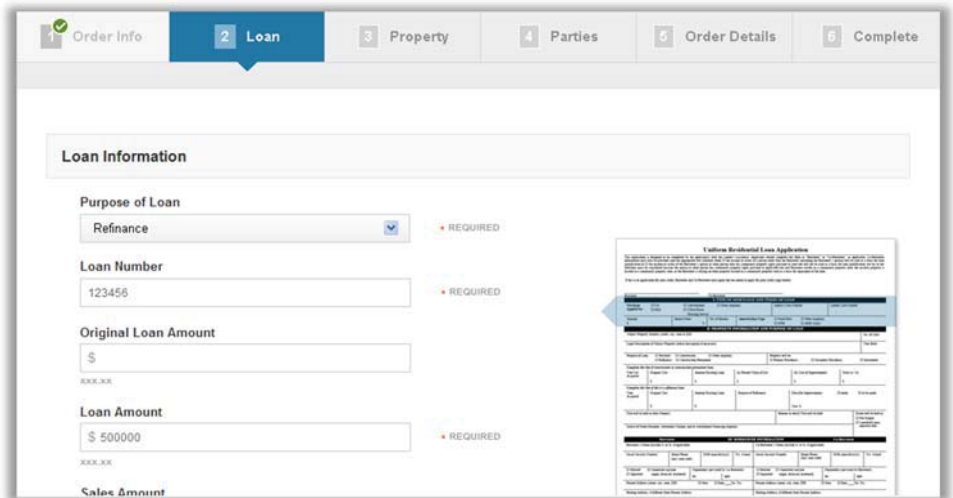
Step 3:

Verify Order Information, then click **Continue**.




Step 3: Enter Loan Information

Enter the loan information and complete the required fields. Click **Continue** when done.



Loan Information

Purpose of Loan: Refinance (REQUIRED)

Loan Number: 123456 (REQUIRED)

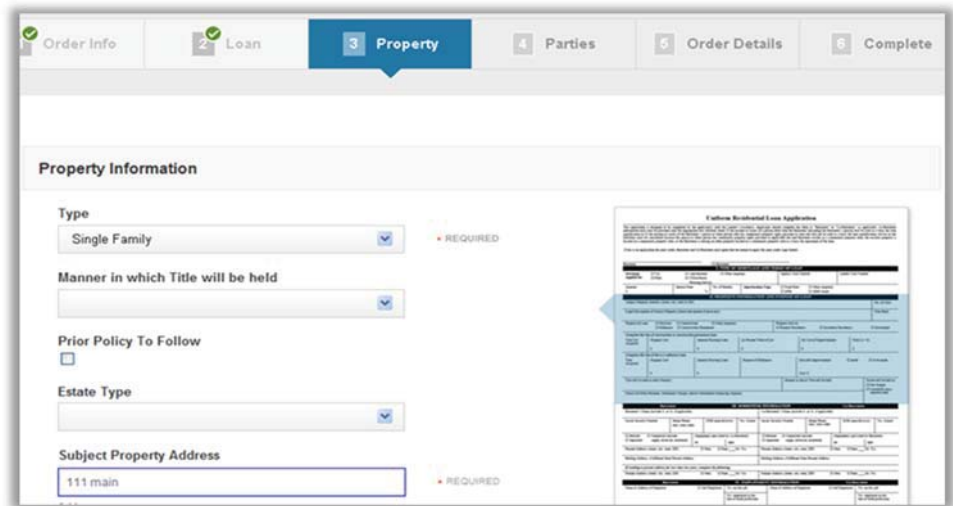
Original Loan Amount: \$ (REQUIRED)

Loan Amount: \$ 500000 (REQUIRED)

Sales Amount: (REQUIRED)

Step 4: Enter Property Information

Enter the subject property information and complete the required fields. Click **Continue**.



Property Information

Type: Single Family (REQUIRED)

Manner in which Title will be held: (REQUIRED)

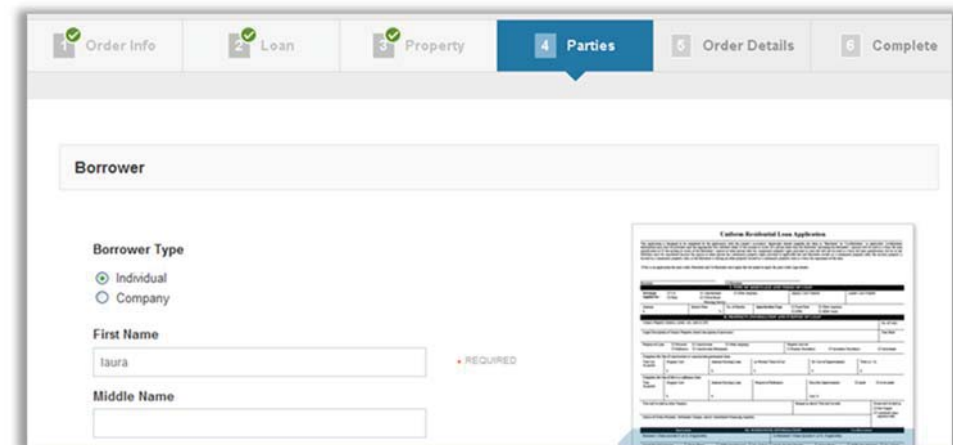
Prior Policy To Follow:

Estate Type: (REQUIRED)

Subject Property Address: 111 main (REQUIRED)

Step 5: Enter Party Information

Enter the party information including Borrower, Co-Borrower, Seller, and Other Contacts. Click **Continue**



Borrower

Borrower Type: Individual Company


First Name: laura (REQUIRED)

Middle Name: (REQUIRED)

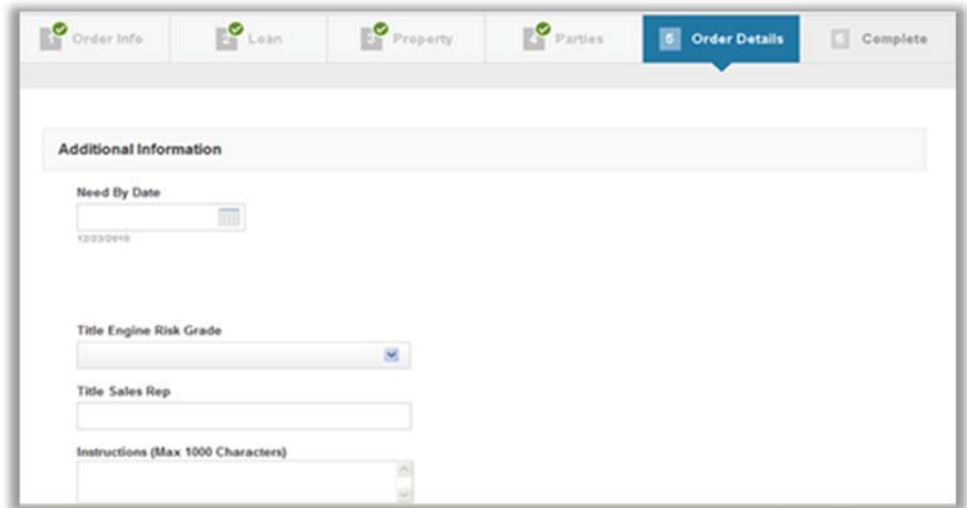


Step 6: Enter Order Details

Enter any additional order information. You may **Add Documents** or **Add Notifications** to this order by

clicking  in those areas on the page (see individual sections denoted in this guide for each process).

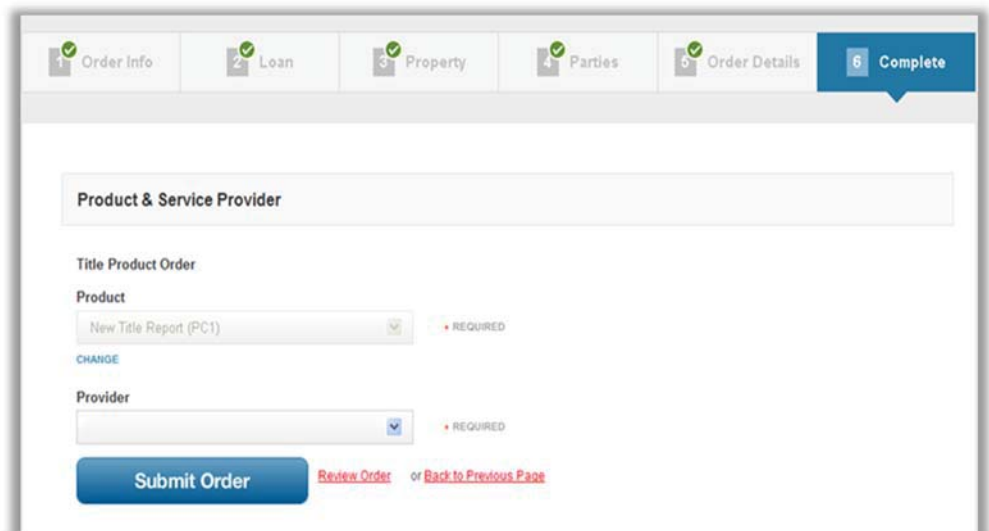
Click **Continue**.



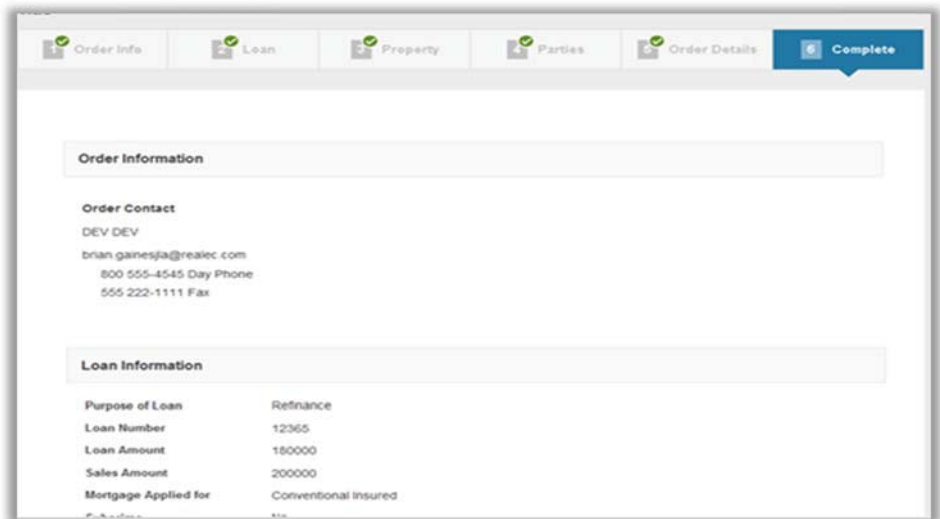
Step 7: Verify Product and Provider

The **Product/Provider** will default to the selection from the **New Order** page OR will be populated with the results from iSelect.

Click **Submit Order** to complete the order. If configured, EPS and/or UCDP sections will be displayed on the page.




NOTE: If you would like to review the order before submitting click the **Review Order** link at the bottom of the page. Once reviewed, click **Submit Order** to complete the order



Order Information

Order Contact
DEV DEV
brian.gainesja@realec.com
800 555-4545 Day Phone
555 222-1111 Fax

Loan Information

Purpose of Loan	Refinance
Loan Number	12365
Loan Amount	180000
Sales Amount	200000
Mortgage Applied for	Conventional insured

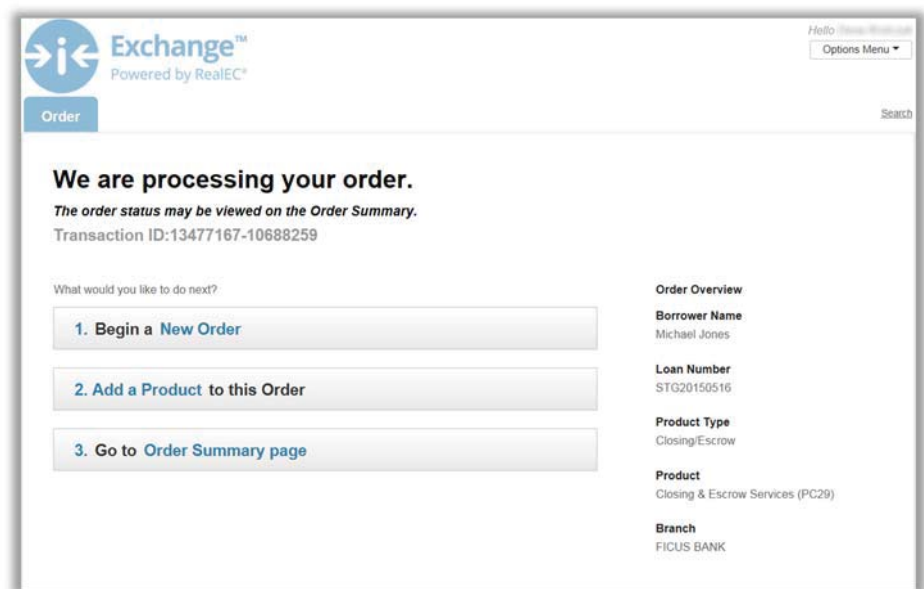
Once the order is placed an **Order Confirmation** page will appear.

Option 1: The user may begin a new order by clicking the Begin a New Order link.

Option 2: The user may add a product to the existing order by clicking the Add a Product to this Order link.

Option 3: To review the order just placed, click the Go to Order Summary Page link.

From the summary page you may Add Events, Add Products, View Order Sheet or Print the Order Summary Report.



Exchange™
Powered by RealEC®

Order

We are processing your order.
The order status may be viewed on the Order Summary.
Transaction ID:13477167-10688259

What would you like to do next?

1. [Begin a New Order](#)
2. [Add a Product to this Order](#)
3. [Go to Order Summary page](#)

Order Overview

Borrower Name
Michael Jones

Loan Number
STG20150516

Product Type
Closing/Escrow

Product
Closing & Escrow Services (PC29)

Branch
FICUS BANK



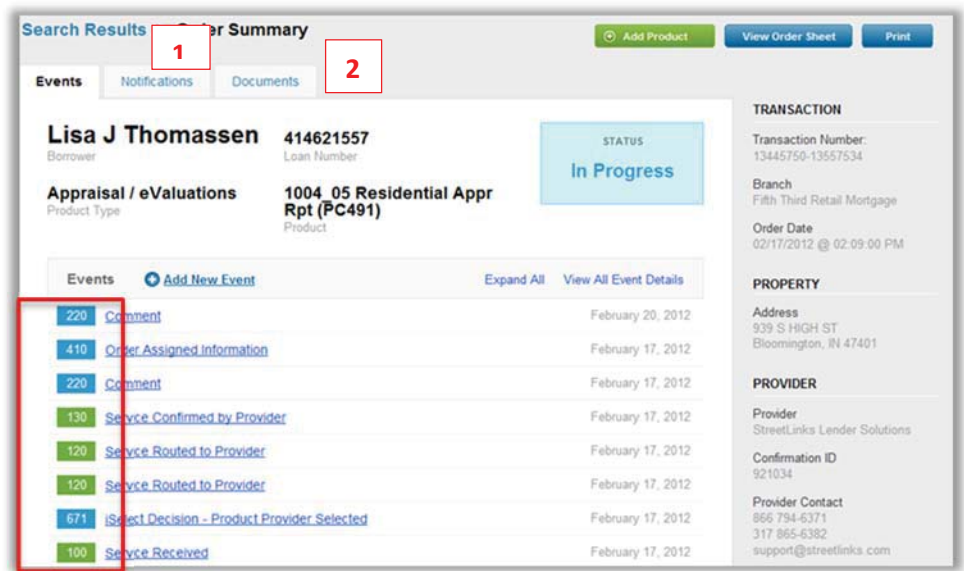
Navigating the Order Summary Page

The Order Summary page is a historical record of all the order events, data and documents. The Order Summary page is also where events, notifications and documents may be added to an order by either lender or provider for communication to the other party:

- 1) Additional email notifications may be set using the **Add Notifications** tab.
- 2) Documents may be added to the order using the **Add Documents** tab (see individual user guides denoted for each process)

Valid event colors are:

- **Red** – Indicates “Reader must act”
- **Yellow** – Indicates “Action may be required (present or future)”
- **Blue** – Indicates “Informative only”
- **Green** – Indicates “Success”



Search Results Order Summary Add Product View Order Sheet Print

Events Notifications Documents

Lisa J Thomassen 414621557 STATUS: In Progress
Borrower Loan Number

Appraisal / eValuations 1004_05 Residential Appr Rpt (PC491)
Product Type Product

TRANSACTION
Transaction Number: 13445750-13557534
Branch: Fifth Third Retail Mortgage
Order Date: 02/17/2012 @ 02:09:00 PM

PROPERTY
Address: 939 S HIGH ST, Bloomington, IN 47401

PROVIDER
Provider: StreetLinks Lender Solutions
Confirmation ID: 921034
Provider Contact: 866 794-6371, 317 865-6382, support@streetlinks.com

Events [Add New Event](#) Expand All View All Event Details

220	Comment	February 20, 2012
410	Order Assigned Information	February 17, 2012
220	Comment	February 17, 2012
130	Service Confirmed by Provider	February 17, 2012
120	Service Routed to Provider	February 17, 2012
120	Service Routed to Provider	February 17, 2012
671	Select Decision - Product Provider Selected	February 17, 2012
100	Service Received	February 17, 2012



Color coding for the **Status** box is to provide a visual cue to users deciphering which statuses require attention:

Status Description	Color
New	Blue
In Progress	Blue
Cancelled	Red
Delayed	Yellow
On Hold	Red
Complete	Green
In Curative	Yellow
Curative Cleared	Green
Review Required	Red
Upgraded	Blue
Not Accepted	Red
Invoiced	Blue
Pending	Yellow
Recorded	Green
Closing Documents executed	Green
Scheduled	Blue
Schedule Declined	Red
Funded	Green



Adding Notifications to an Order

Step 1: Conduct a search for the order you wish to add a notification.

From the Search Results Page, click the **Transaction Number** to display the Order Summary page.

Search Results

Searched:

Date Category: **Date Ordered** Quick Date: **Custom** Beginning Date: **01/21/2011**

Sort Order: **Transaction Number Ascending**

View 1 - 10 of 7 777

Transaction Number	Due	Doc	Date Ordered	Date Completed
10100-164165			09/07/2011 10:27:41 AM	
10100-42624			02/25/2011 10:31:25 AM	
10100-43457			01/21/2011 04:19:18 PM	
10100-43458			01/21/2011 04:23:14 PM	

Step 2: Click the **Notifications** tab at the top of the Event History.

Events **Notifications** Documents

James A Homeowner
Borrower

Demotest2014
Loan Number

Closing/Escrow
Product Type

Closing & Escrow Services (PC29)
Product

STATUS
In Progress

Events [+ Add New Event](#) Expand All View All Event Details

	460 Document Attached by Customer		April 30, 2014
	406 Closing Statement Delivered		April 8, 2014

Step 3: Users may add additional parties to certain event communications. Click the **Attach Notifications** link to display current order notifications.

NOTE: Required fields are denoted by an asterisk * and the word "Required"

Events **Notifications** Documents

Sent Notifications History Expand All

	100 Service Received	Method: Web	November 15, 2011
	100 Service Received	Method: Email	October 7, 2011
	100 Service Received	Method: Local	October 7, 2011
	130 Service Confirmed by Provider	Method: Web	November 15, 2011

Receiving Notifications [+ Attach Notifications](#) Collapse All

No Ad Hoc Notifications Have Been Set Up



Step 4:

- Enter the email address of the party you wish to receive notification and select the notifications you would like them to receive.
- **NOTE:** Click **Select All** for the user to receive all notifications listed.
- Attach additional notifications for other users by clicking the **Attach More Notifications** link.
- Click **Submit Notifications** to set.

Email (Separate by comma to add multiple emails) Undo

lmathews@realec.com • REQUIRED

Select Notifications

Check at least one box to add notifications. Unselect All

<input checked="" type="checkbox"/> Service Confirmed by Provider (130)	<input checked="" type="checkbox"/> Scheduled (300)
<input checked="" type="checkbox"/> Product Delivered by Provider (150)	<input checked="" type="checkbox"/> Inspected (320)
<input checked="" type="checkbox"/> Document Delivered by Provider (180)	<input checked="" type="checkbox"/> Payment Information Correction Required (341)
<input checked="" type="checkbox"/> Service Completed (270)	<input checked="" type="checkbox"/> Rate Quote Returned (138)
<input checked="" type="checkbox"/> Comment (220)	<input checked="" type="checkbox"/> Analysis No Exception (785)
<input checked="" type="checkbox"/> Comment Action Required (222)	<input checked="" type="checkbox"/> Analysis Exception (786)
<input checked="" type="checkbox"/> Service On Hold (230)	<input checked="" type="checkbox"/> Analysis Not Performed (787)

[+ Attach More Notifications](#) **Submit Notifications** or Cancel

Once notifications are set, the page will refresh and the email setup will display. Click the **View/Edit** link to view or edit notifications that have been set.

Events	Notifications	Documents
Sent Notifications History Expand All		
100	Service Received	Method: Web November 15, 2011
100	Service Received	Method: Email October 7, 2011
100	Service Received	Method: Local October 7, 2011
130	Service Confirmed by Provider	Method: Web November 15, 2011
Receiving Notifications Expand All		
+ Attach Notifications		
lmathews@realec.com	14 Notifications Set Up	View/Edit

The **View/Edit** page will display the notifications that are set on the order.

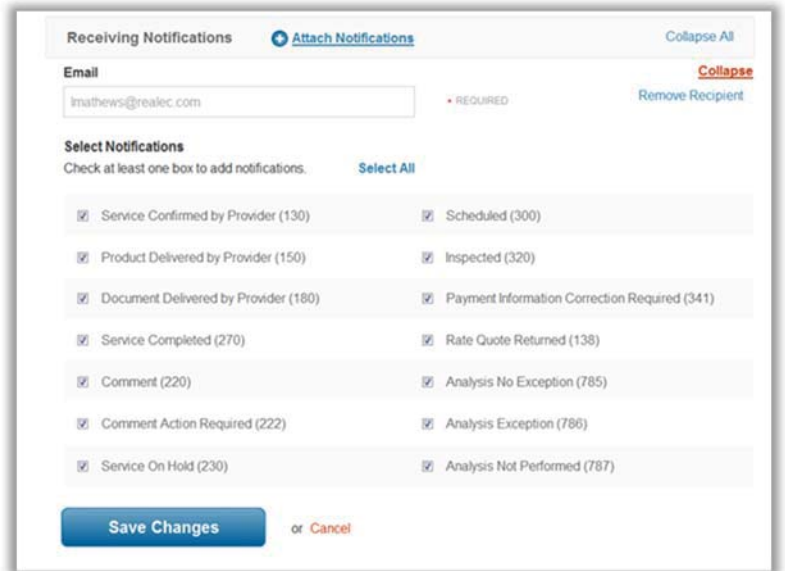
The user will have the ability to remove ALL notifications and recipient information by clicking the **Remove Recipient** link.

Receiving Notifications	+ Attach Notifications	Expand All
lmathews@realec.com will be notified of:		
130 Service Confirmed by Provider	Service: Appraisal / eValuations	Collapse
138 Rate Quote Returned	Service: Appraisal / eValuations	Edit Notification
150 Product Delivered by Provider	Service: Appraisal / eValuations	Remove Recipient
180 Document Delivered by Provider	Service: Appraisal / eValuations	
220 Comment	Service: Appraisal / eValuations	
222 Comment Action Required	Service: Appraisal / eValuations	
230 Service On Hold	Service: Appraisal / eValuations	
270 Service Completed	Service: Appraisal / eValuations	
300 Scheduled	Service: Appraisal / eValuations	
320 Inspected	Service: Appraisal / eValuations	
341 Payment Information Correction Required	Service: Appraisal / eValuations	
785 Analysis No Exception	Service: Appraisal / eValuations	
786 Analysis Exception	Service: Appraisal / eValuations	
787 Analysis Not Performed	Service: Appraisal / eValuations	



Step 5: Click **Edit Notifications** to edit the user notifications. The page will refresh. De-select the boxes next to the notifications you wish to remove and click **Save Changes**.

The **Remove Recipient** link is also available if you wish to remove all notifications as well as the recipient email.



Receiving Notifications [Attach Notifications](#) [Collapse All](#)

Email: REQUIRED [Collapse](#) [Remove Recipient](#)

Select Notifications
Check at least one box to add notifications. [Select All](#)

<input checked="" type="checkbox"/> Service Confirmed by Provider (130)	<input checked="" type="checkbox"/> Scheduled (300)
<input checked="" type="checkbox"/> Product Delivered by Provider (150)	<input checked="" type="checkbox"/> Inspected (320)
<input checked="" type="checkbox"/> Document Delivered by Provider (180)	<input checked="" type="checkbox"/> Payment Information Correction Required (341)
<input checked="" type="checkbox"/> Service Completed (270)	<input checked="" type="checkbox"/> Rate Quote Returned (138)
<input checked="" type="checkbox"/> Comment (220)	<input checked="" type="checkbox"/> Analysis No Exception (785)
<input checked="" type="checkbox"/> Comment Action Required (222)	<input checked="" type="checkbox"/> Analysis Exception (786)
<input checked="" type="checkbox"/> Service On Hold (230)	<input checked="" type="checkbox"/> Analysis Not Performed (787)

[Save Changes](#) or [Cancel](#)

Adding Events to an Order

Step 1: Access the Order Summary page by clicking the **Transaction Number** from the search results page.

Searched:

Branch: **Fifth Third Retail Mortgage** Summary Status: **In Progress** Product Type: **Appraisal / eValuations**
 Product: **1004_05 Residential Appr Rpt (PC491)** Date Category: **Date Ordered** Quick Date: **This Month**
 Beginning Date: 02/01/2012 Ending Date: 02/20/2012 Sort Order: **Transaction Number Ascending**

Transaction Number	Due	Doc	Date Ordered	Date Completed	Product Type
13445750-13555928			02/08/2012 03:14:05 PM		Appraisal / eValuations
13445750-13556021			02/08/2012 03:21:10 PM		Appraisal / eValuations
13445750-13556332			02/08/2012 03:47:19 PM		Appraisal / eValuations
13445750-13556993			02/08/2012 04:44:42 PM		Appraisal / eValuations
13445750-13557093			02/08/2012 04:55:05 PM		Appraisal / eValuations
13445750-13557534			02/17/2012 02:09:00 PM		Appraisal / eValuations

The **Add New Event** link is located at the top left of the event history on the Order Summary page.

Search Results > **Order Summary** [Add Product](#) [View Order Sheet](#) [Print](#)

Events [Notifications](#) [Documents](#)

Lisa J Thomassen 414621557
Borrower Loan Number

Appraisal / eValuations 1004_05 Residential Appr Rpt (PC491)
Product Type Product

STATUS
In Progress

[Add New Event](#) [Expand All](#) [View All Event Details](#)

Event ID	Event Name	Date
220	Comment	February 20, 2012
419	Order Assigned Information	February 17, 2012
220	Comment	February 17, 2012
130	Service Confirmed by Provider	February 17, 2012
120	Service Routed to Provider	February 17, 2012
120	Service Routed to Provider	February 17, 2012
671	Select Decision - Product Provider Selected	February 17, 2012
100	Service Received	February 17, 2012

TRANSACTION
Transaction Number: 13445750-13557534
Branch: Fifth Third Retail Mortgage
Order Date: 02/17/2012 @ 02:09:00 PM

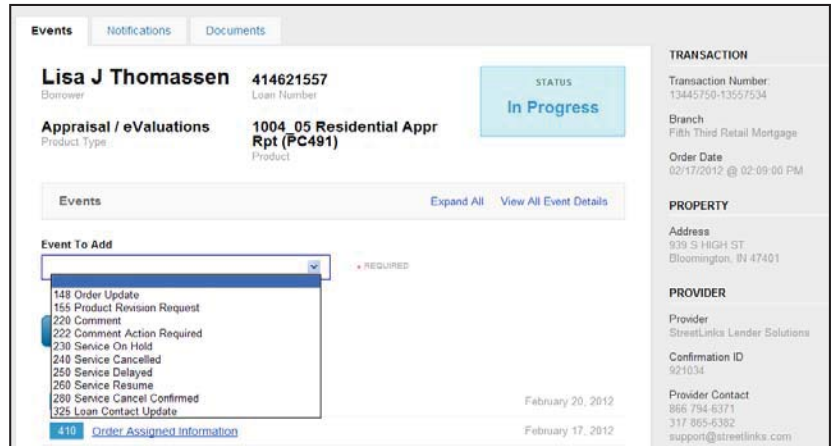
PROPERTY
Address: 529 S HIGH ST
Bloomington, IN 47401

PROVIDER
Provider: StreetLinks Lender Solutions
Confirmation ID: 921034
Provider Contact: 866-794-6371
317-865-6382
support@streetlinks.com



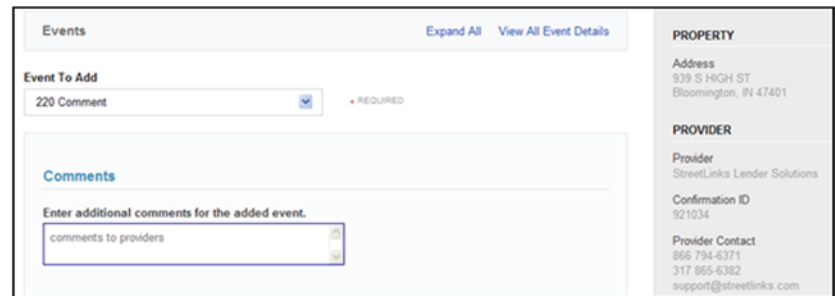
Step 2: Select the event from the event drop down list

NOTE: Events are listed in order by event number



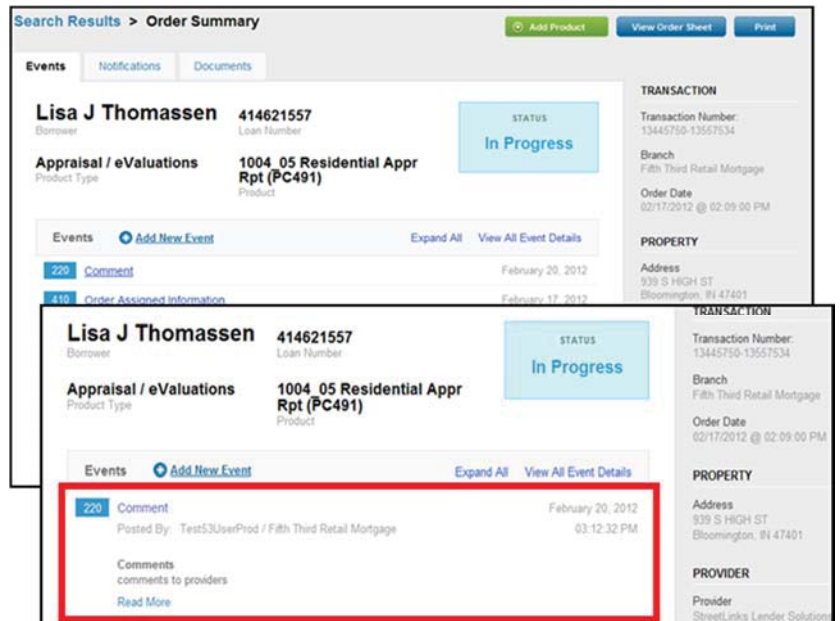
Once the event is selected, fill in additional required fields. Click **Add Event** to add the event to the order.

NOTE: Required fields are denoted by an asterisk * and the word "Required"

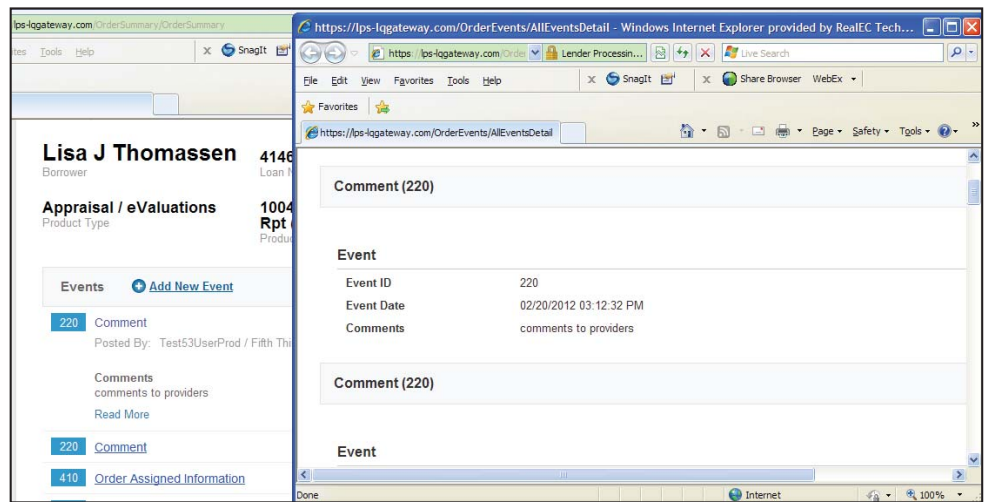


The events will display on the Event History page in chronological order. Click on the Event name to display additional information (event comments, date and time event was sent, and which user posted the event).

Click the **Read More** link to view further event details.



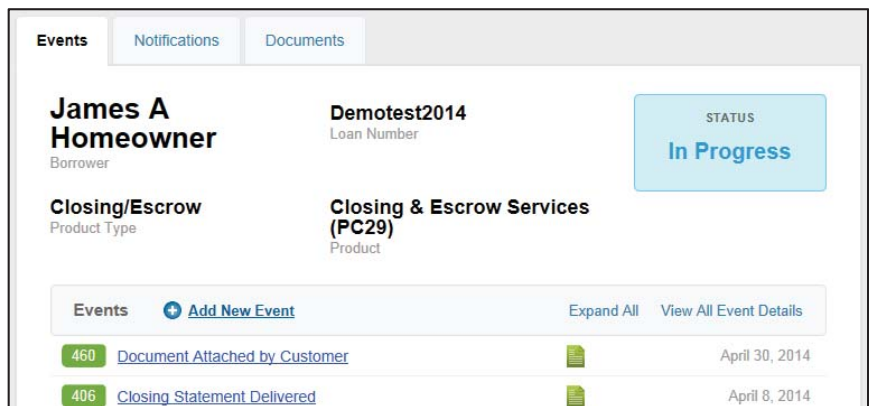

Clicking **Read More** will open a new browser page that displays all event details.



Adding Documents to an Order

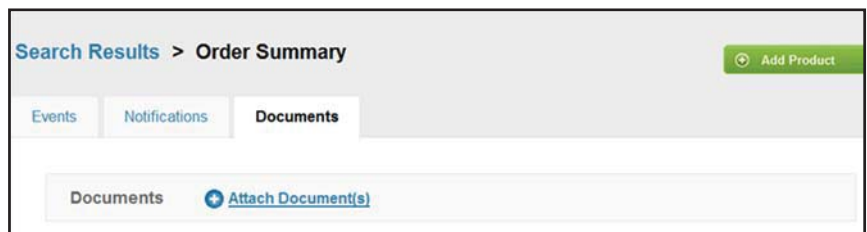
Step 1: Conduct a search for the order you wish to add a document. From the search results page, click the **Transaction Number** to display the **Order Summary** page.

Step 2: Click the Documents tab at the top of the Event History.

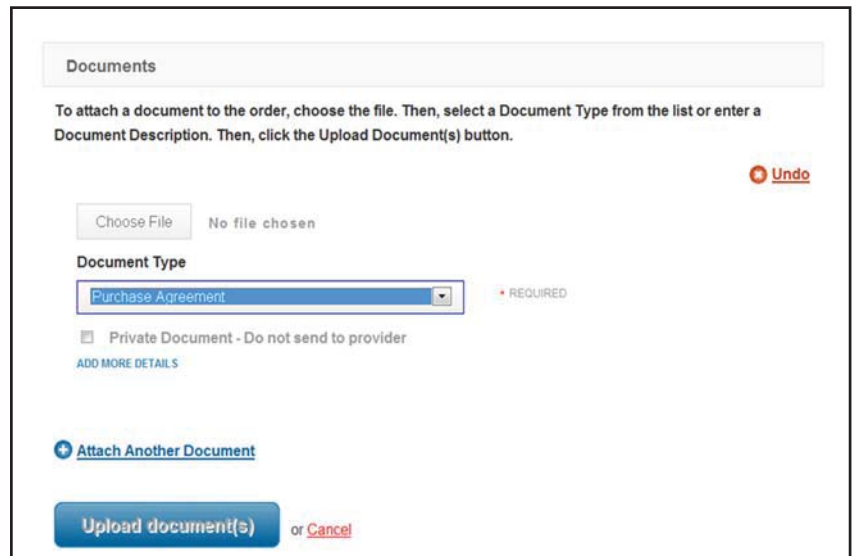


Step 3: Click the **Attach Documents** link

NOTE: Required fields are denoted by an asterisk * and the word "Required"



Step 4: Click **Choose File** to browse files on your computer. Select the appropriate document and click **Open** to attach the document.



Documents

To attach a document to the order, choose the file. Then, select a Document Type from the list or enter a Document Description. Then, click the Upload Document(s) button.

[Undo](#)

Choose File No file chosen

Document Type

Purchase Agreement * REQUIRED

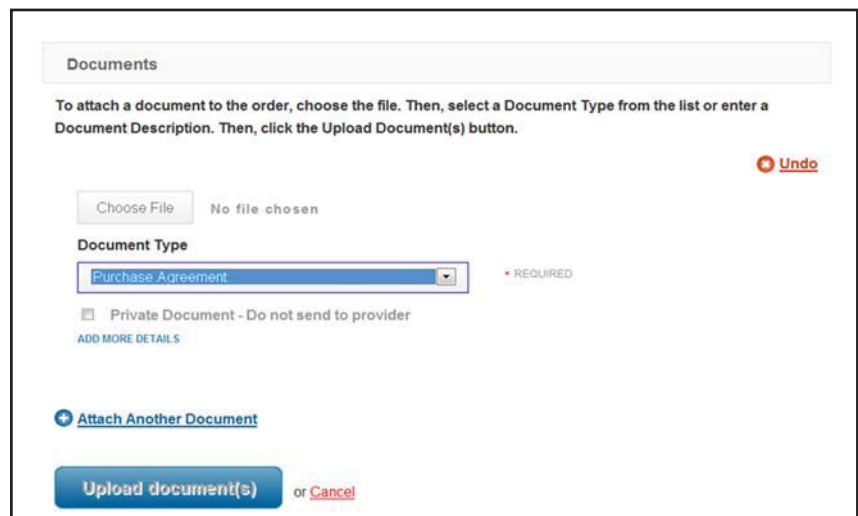
Private Document - Do not send to provider

[ADD MORE DETAILS](#)

[+ Attach Another Document](#)

Upload document(s) or [Cancel](#)

Enter a description of the document, either via the drop-down menu labeled Document Type or type the document name in the Document Description field below it.



Documents

To attach a document to the order, choose the file. Then, select a Document Type from the list or enter a Document Description. Then, click the Upload Document(s) button.

[Undo](#)

Choose File No file chosen

Document Type

Purchase Agreement * REQUIRED

Private Document - Do not send to provider

[ADD MORE DETAILS](#)

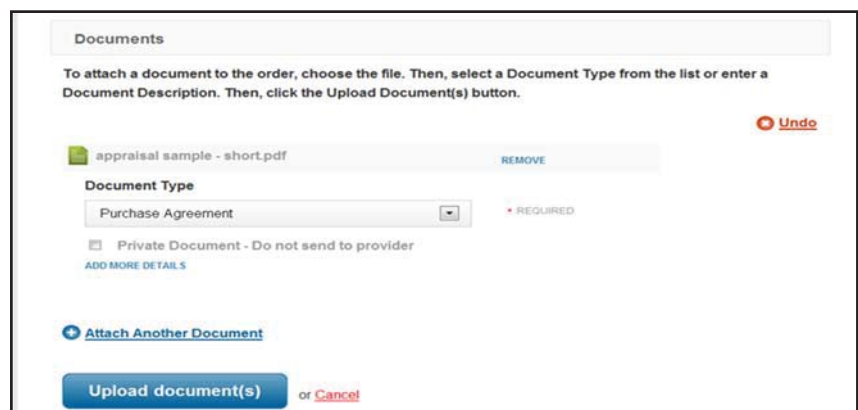
[+ Attach Another Document](#)

Upload document(s) or [Cancel](#)

The page will refresh and display the document.

Note: You may remove the document if needed by clicking [Undo](#).


Click *Upload document(s)* to complete the document upload. The page will display the document that has been uploaded.



Documents

To attach a document to the order, choose the file. Then, select a Document Type from the list or enter a Document Description. Then, click the Upload Document(s) button.

[Undo](#)

 appraisal sample - short.pdf [REMOVE](#)

Document Type

Purchase Agreement * REQUIRED

Private Document - Do not send to provider

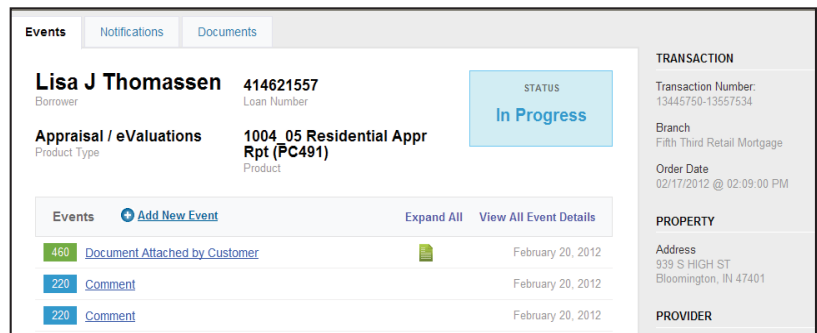
[ADD MORE DETAILS](#)

[+ Attach Another Document](#)

Upload document(s) or [Cancel](#)



The document upload will display on the **Events** tab as a **460 event (Document Attached by Customer)**.



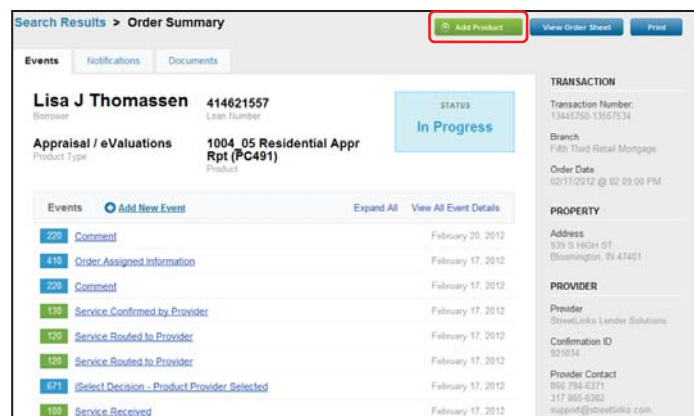
Events	Notifications	Documents									
<p>Lisa J Thomassen 414621557 Borrower Loan Number</p> <p>Appraisal / eValuations 1004_05 Residential Appr Rpt (PC491) Product Type Product</p> <p>STATUS: In Progress</p>											
<p>TRANSACTION</p> <p>Transaction Number: 13445750-13557534</p> <p>Branch: Fifth Third Retail Mortgage</p> <p>Order Date: 02/17/2012 @ 02:09:00 PM</p>											
<p>PROPERTY</p> <p>Address: 939 S HIGH ST, Bloomington, IN 47401</p>											
<p>PROVIDER</p>											
<p>Events Add New Event Expand All View All Event Details</p> <table border="1"> <tr> <td>460</td> <td>Document Attached by Customer</td> <td>February 20, 2012</td> </tr> <tr> <td>220</td> <td>Comment</td> <td>February 20, 2012</td> </tr> <tr> <td>220</td> <td>Comment</td> <td>February 20, 2012</td> </tr> </table>			460	Document Attached by Customer	February 20, 2012	220	Comment	February 20, 2012	220	Comment	February 20, 2012
460	Document Attached by Customer	February 20, 2012									
220	Comment	February 20, 2012									
220	Comment	February 20, 2012									

Adding a Product to an Existing Order

Step 1: Search for the existing order via the Order Dashboard or Search functionality (see corresponding sections within this guide). Click the corresponding **Transaction Number** to access the **Order Summary** page.

NOTE: A product can also be added from the Order Confirmation page, which appears immediately after a product order is placed.

Step 2: Click **Add Product** at the top of the page to access the **New Order** page.



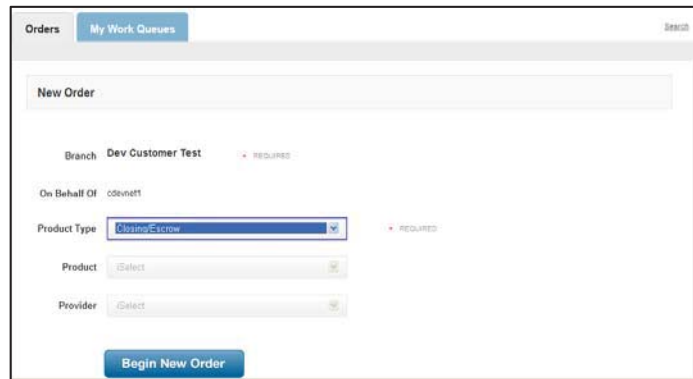
Events	Notifications	Documents																								
<p>Lisa J Thomassen 414621557 Borrower Loan Number</p> <p>Appraisal / eValuations 1004_05 Residential Appr Rpt (PC491) Product Type Product</p> <p>STATUS: In Progress</p>																										
<p>TRANSACTION</p> <p>Transaction Number: 13445750-13557534</p> <p>Branch: Fifth Third Retail Mortgage</p> <p>Order Date: 02/17/2012 @ 02:09:00 PM</p>																										
<p>PROPERTY</p> <p>Address: 939 S HIGH ST, Bloomington, IN 47401</p>																										
<p>PROVIDER</p> <p>Provider: StreetLinks Lender Solutions</p> <p>Confirmation ID: 507034</p> <p>Provider Contact: 888-794-4371, 317-885-6382, support@streetlinks.com</p>																										
<p>Search Results > Order Summary Add Product View Order Sheet Print</p> <p>Events Add New Event Expand All View All Event Details</p> <table border="1"> <tr> <td>220</td> <td>Comment</td> <td>February 20, 2012</td> </tr> <tr> <td>410</td> <td>Order Assigned Information</td> <td>February 17, 2012</td> </tr> <tr> <td>220</td> <td>Comment</td> <td>February 17, 2012</td> </tr> <tr> <td>130</td> <td>Service Confirmed by Provider</td> <td>February 17, 2012</td> </tr> <tr> <td>130</td> <td>Service Routed to Provider</td> <td>February 17, 2012</td> </tr> <tr> <td>130</td> <td>Service Routed to Provider</td> <td>February 17, 2012</td> </tr> <tr> <td>171</td> <td>Select Decision - Product Provider Selected</td> <td>February 17, 2012</td> </tr> <tr> <td>100</td> <td>Service Received</td> <td>February 17, 2012</td> </tr> </table>			220	Comment	February 20, 2012	410	Order Assigned Information	February 17, 2012	220	Comment	February 17, 2012	130	Service Confirmed by Provider	February 17, 2012	130	Service Routed to Provider	February 17, 2012	130	Service Routed to Provider	February 17, 2012	171	Select Decision - Product Provider Selected	February 17, 2012	100	Service Received	February 17, 2012
220	Comment	February 20, 2012																								
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130	Service Routed to Provider	February 17, 2012																								
171	Select Decision - Product Provider Selected	February 17, 2012																								
100	Service Received	February 17, 2012																								



Step 3: Choose the Product Type, Product and Provider

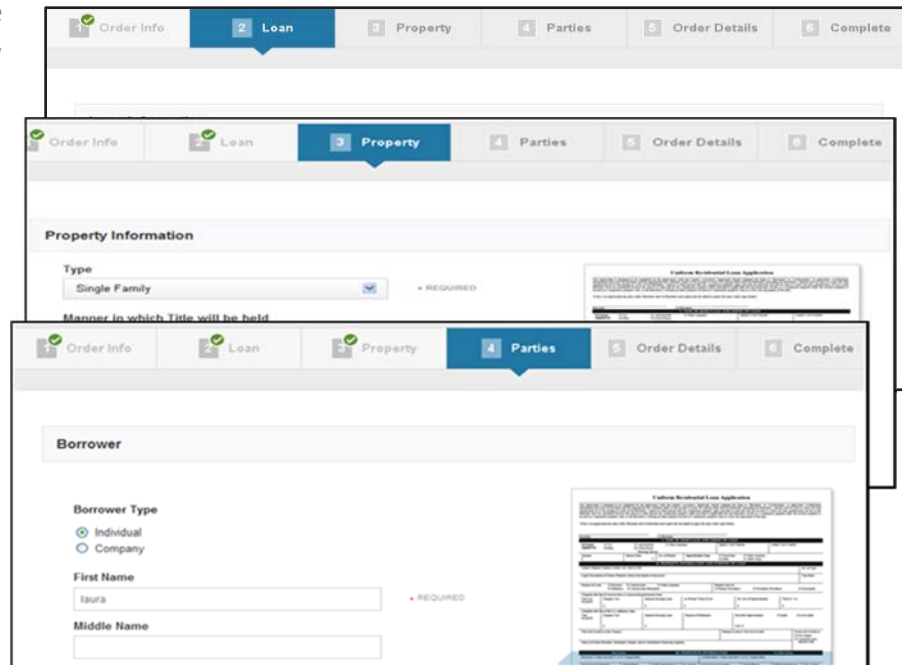
Click **Begin New Order** to begin the product order process

NOTE: Required fields are denoted by an asterisk* and the word "Required"



Step 4: The majority of the information will be pulled from the original order, so you will only be taking a few steps to add an additional products.

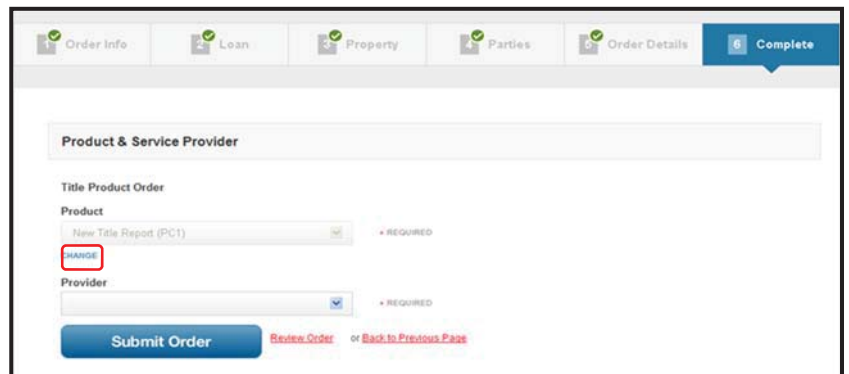
Complete order screens 1-5. **Verify** order, Loan, Property, Party and Order Details information.



Step 5: Review the **Product** and **Provider** selections (click the **Change** link if corrections are required).

The **Product** and **Provider** will default to what was previously selected on the **New Order** page.

Click **Submit Order** to complete.




NOTE: If this is an Appraisal order and the lender is sending completed appraisals to UCDP, the UCDP credentials will display after the **Product/Provider** choices on the **Complete** tab.

Click **Submit Order**

Product & Service Provider

Appraisal / eValuations Product Order via iSelect
Select or edit the service provider based on your party's profile once a product is selected. Select the Appraisal / eValuations product to continue.

Product
USDA_01 Residential App App (PCAP)

Provider
ITEST National Valuation Services - Ohio

Uniform Collateral Data Submission

Investor (Check all that apply)

Fannie Mae

FMSA Seller Number

FMSA Lender Institution Identifier

FMSA Casefile Identifier

Freddie Mac

FHLMC Seller Number

FHLMC Identification Number

FHLMC Loan Prospector Key Number

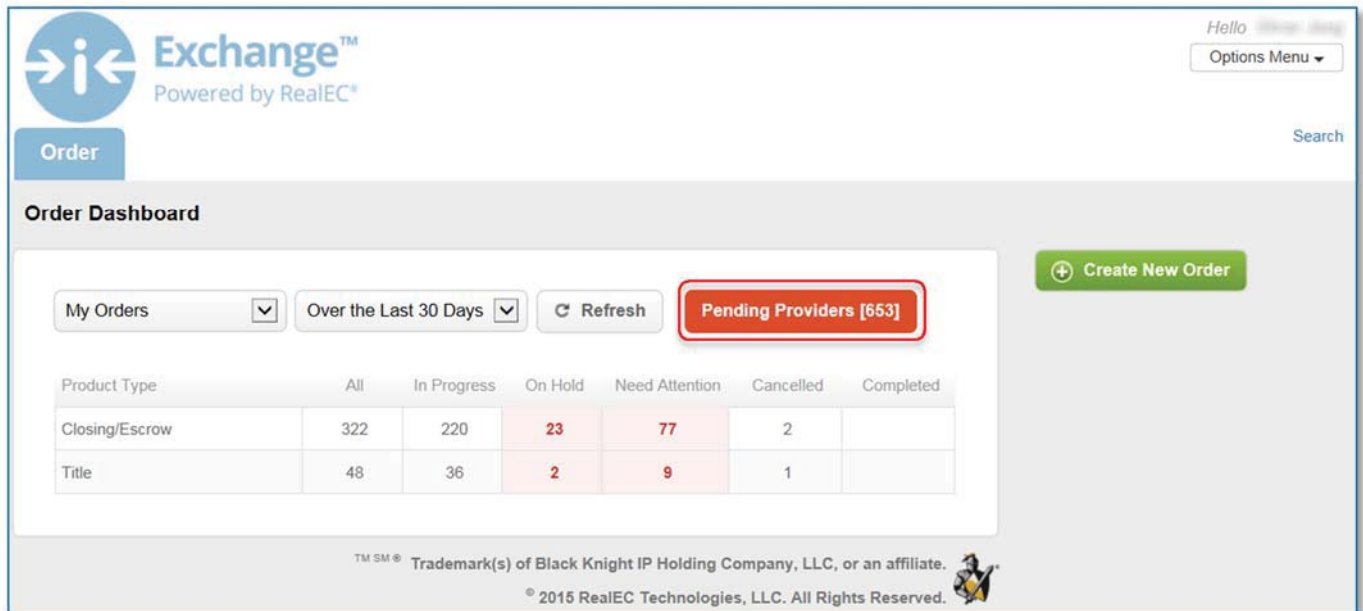
[Cancel Order](#) [Back to Product Page](#)



Utilizing the Pending Providers Dashboard

The Pending Providers Dashboard will display all Title, Closing & Doc Signing orders that are pending because the Provider has not yet completed registration. You can send a reminder email to the Provider, change the Provider for an Order, or cancel the Entire Order.

To access, click on the Pending Providers button from the Order Dashboard.



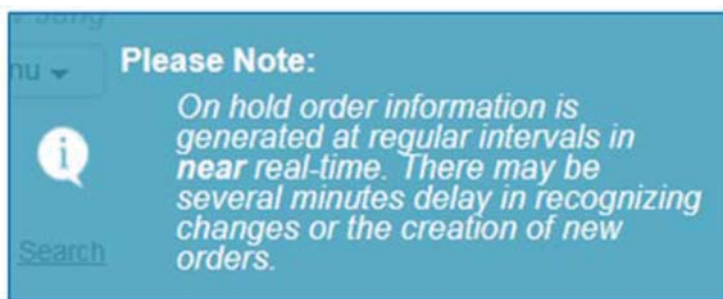
Order Dashboard

My Orders Over the Last 30 Days Refresh Pending Providers [653]

Product Type	All	In Progress	On Hold	Need Attention	Cancelled	Completed
Closing/Escrow	322	220	23	77	2	
Title	48	36	2	9	1	

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You will receive a toast message in the corner of the screen upon launching the dashboard:



Please Note:

On hold order information is generated at regular intervals in near real-time. There may be several minutes delay in recognizing changes or the creation of new orders.

All columns (except Action) are sortable by ascending or descending order.

Search for a Provider by Product Name, Loan Number or Transaction ID. Wildcard searches are accepted.

The Actions available are dependent upon the Provider Status.

Work Queue List		Pending Providers			
Action	Provider Status	Transaction ID	Product Name	Create Date	Loan Number
Resend Email Cancel Order	Potential Duplicate	13461222-491778-2	Closing & Escrow Services	10/18/2015	123
Resend Email Edit Provider Cancel Order	Pending Registration	13461222-491788-1	Commitment/Prelim Rpt	10/18/2015	1245687654
Resend Email Edit Provider Cancel Order	Pending Registration	13461222-491788-2	Closing & Escrow Services	10/18/2015	1245687654
Resend Email Edit Provider Cancel Order	Pending Registration	13461222-491788-2	Closing & Escrow Services	10/18/2015	1245687654
Resend Email Edit Provider Cancel Order	Pending Registration	13461222-491020-1	Closing & Escrow Services	10/19/2015	ss31410192015
Resend Email Edit Provider Cancel Order	Pending Registration	13461222-491828-1	Closing & Escrow Services	10/19/2015	ss31410192015
Resend Email Cancel Order	Potential Duplicate	13461222-491876-1	Closing & Escrow Services	10/19/2015	ss42810192015
Resend Email Cancel Order	Potential Duplicate	13461222-491926-1	Closing & Escrow Services	10/19/2015	loan01431
Resend Email Edit Provider Cancel Order	Pending Registration	13461222-492172-1	Closing & Escrow Services	10/20/2015	4567kk
Resend Email Edit Provider Cancel Order	Pending Registration	13461222-492174-1	Commitment/Prelim Rpt	10/20/2015	4567kk

Showing 11 to 20 of 654 entries

[First](#)
[Previous](#)
[1](#)
[2](#)
[3](#)
[4](#)
[5](#)
[...](#)
[66](#)
[Next](#)
[Last](#)





Provider Status

Pending Registration

Provider has not completed the registration process.

Possible Actions: Resend Email, Edit Provider or Cancel Order

Potential Duplicate

A potential duplicate Provider has been invited and needs confirmation.

Possible Actions: Potential Duplicates should be managed in the Order Summary.

Please see the Duplicate Check Process in this document for instructions on addressing potential duplicates.

Profile Incomplete

Provider has not yet completed the registration process.

Possible Actions: Resend Email, Edit Provider or Cancel Order



Action

Resend Email

This option will resend the Invitation Email to the Provider, reminding them to register.

Click *Resend Email* link. A pop-up will appear with general Lender and Provider information.

Enter any applicable comments and press *Submit*.

A toast message will appear stating “A reminder email has been sent to the Provider.”

Resend Email

[This will send out another reminder email to the invited Provider]

Provider Details			
Provider Name	AZBYCX10180747	Address	123 10180747 Test
Contact Name	[Redacted]		Mobile, 36695
Original Invitation sent on	10/18/2015	Contact Phone Number	[Redacted]
		Contact Email	[Redacted]

Loan Contact Information			
Lender Name	Ficus Bank	Phone	800 555-1212
Contact	QALender1 CollaborationPortal	Email	[Redacted]

Comments

Enter additional comments for the added event

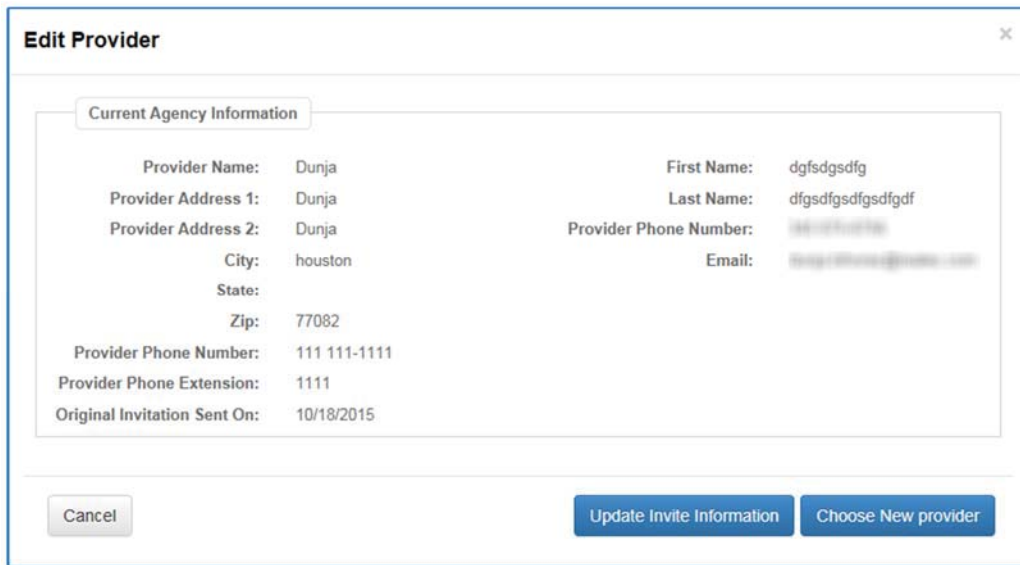


Edit Provider

This option allows you to change the Provider contact information and send an updated Registration email.

Click on *Edit Provider* link. A pop-up will appear with the current Agency information.

Click *Update Invite Information* button to edit and send a new invitation or click on *Choose New Provider* button to be directed to the Agency/Agent Search screen.



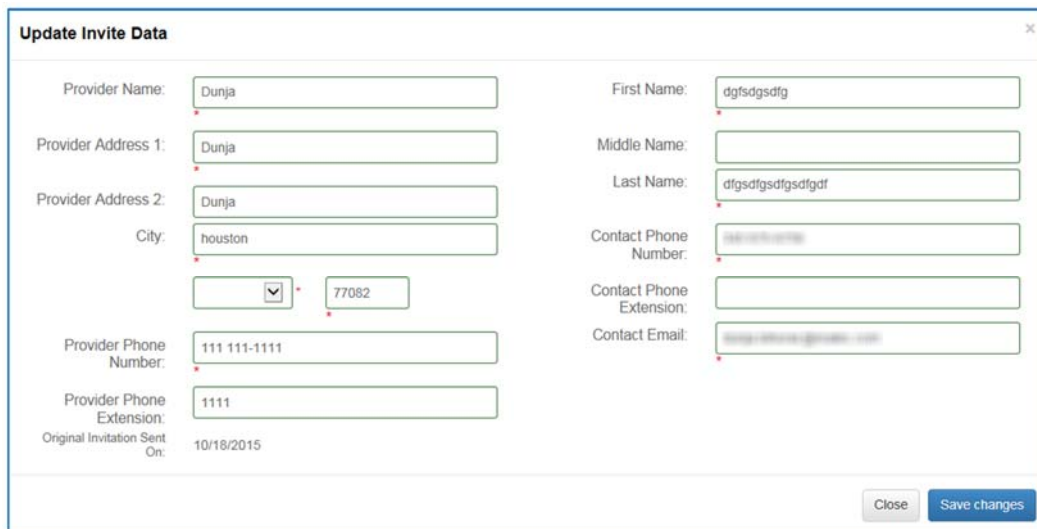
Edit Provider

Current Agency Information

Provider Name:	Dunja	First Name:	dgfsdgsdfg
Provider Address 1:	Dunja	Last Name:	dfgsdfgsdfgsdfgdf
Provider Address 2:	Dunja	Provider Phone Number:	111-111-1111
City:	houston	Email:	111-111-1111@provider.com
State:			
Zip:	77082		
Provider Phone Number:	111 111-1111		
Provider Phone Extension:	1111		
Original Invitation Sent On:	10/18/2015		

Update Invite Information

Click *Update Invite Information*. Make any necessary changes and click Save Changes.



Update Invite Data

Provider Name:	<input type="text" value="Dunja"/>	First Name:	<input type="text" value="dgfsdgsdfg"/>
Provider Address 1:	<input type="text" value="Dunja"/>	Middle Name:	<input type="text"/>
Provider Address 2:	<input type="text" value="Dunja"/>	Last Name:	<input type="text" value="dfgsdfgsdfgsdfgdf"/>
City:	<input type="text" value="houston"/>	Contact Phone Number:	<input type="text" value="111-111-1111"/>
	<input type="text" value="77082"/>	Contact Phone Extension:	<input type="text"/>
Provider Phone Number:	<input type="text" value="111 111-1111"/>	Contact Email:	<input type="text" value="111-111-1111@provider.com"/>
Provider Phone Extension:	<input type="text" value="1111"/>		
Original Invitation Sent On:	10/18/2015		



A screen will appear with the Current Agency Information on top of the Changed Agency Information. Once the information is confirmed as correct, click *Submit*. An invitation to register will be sent to the new contact information.

A toast message will appear stating “The newly selected provider has been added to the order.”

Edit Provider
✕

Current Agency Information

Provider Name: Dunja	First Name: dgfsdgsdfg
Provider Address 1: Dunja	Last Name: dgfsdgsdfgsdfgdf
Provider Address 2: Dunja	Provider Phone Number: 111 111-1111
City: houston	Email: dgfsdgsdfg@real.com
State:	
Zip: 77082	
Provider Phone Number: 111 111-1111	
Provider Phone Extension: 1111	
Original Invitation Sent On: 10/18/2015	

Changed Agency Information

Provider Name: Dunja	First Name: dgfsdgsdfg
Provider Address 1: Dunja	Last Name: dgfsdgsdfgsdfgdf
Provider Address 2: Dunja	Provider Phone Number: 111 111-1112
City: houston	Email: dgfsdgsdfg@real.com
State:	
Zip: 77082	
Provider Phone Number: 111 111-1112	
Provider Phone Extension: 1111	
Original Invitation Sent On: 10/18/2015	

Submit
Cancel

Update Invite Information
Choose New provider



Choose New Provider

Click *Choose New Provider* button. The Provider Search pop-up will appear. For more information on Agency Search, see the *Selecting a Settlement Provider and Agent* job aid.

Provider / Agent Search | Commitment/Prelim Rpt (PC3)

Search Options

To search for an existing Provider or Agent, select a state within the Provider's coverage area and/or enter the Agent's email address. Alternatively, search by the Provider's Party ID.

<p>Search by State and/or Email</p> <table border="0"><tr><td>Provider Coverage State</td><td>Agent Email</td></tr><tr><td><input type="text" value=""/></td><td><input type="text" value=""/></td></tr></table>	Provider Coverage State	Agent Email	<input type="text" value=""/>	<input type="text" value=""/>	OR	<p>Search by Provider Party ID</p> <table border="0"><tr><td>Provider Party ID</td></tr><tr><td><input type="text" value=""/></td></tr></table>	Provider Party ID	<input type="text" value=""/>	<input type="button" value="Search"/>
Provider Coverage State	Agent Email								
<input type="text" value=""/>	<input type="text" value=""/>								
Provider Party ID									
<input type="text" value=""/>									

[Invite New Provider / Agent](#)

Cancel Order

This option will cancel the order.

Click the *Cancel* link. A pop-up will appear displaying general order information. Choose a Reason Code from the dropdown, enter any applicable comments and click *Submit*.

A toast message will appear stating “The order has been cancelled, it may take up to several minutes for the change to occur.”

Cancel Order

[This will Cancel the Title/Closing order for which the invitation was sent to the provider]

Closing Order Details

Transaction	13461222-491785-1	Loan	5:20PM
Borrower Name	esfdghj dwasfg	Date	10/18/2015
Provider Name	sdfdfg	Contact Name	[REDACTED]
Provider Address	ertgrhytuyjyhtrgewd houston, 77082	Contact Phone Number	1111117777
Invitation sent on		Contact Email	[REDACTED]

Comments

Enter additional comments for the added event

Reason Codes

Reason Code

Comment

[+ Add reason code](#)



Duplicate Check Process

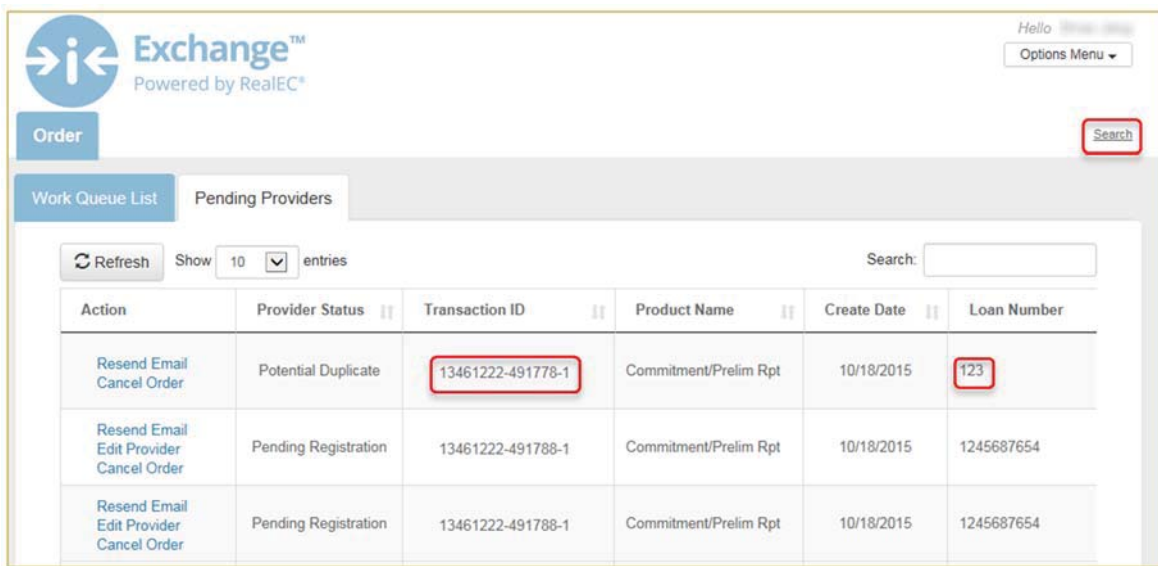
When the Lender submits the registration invitation, RealEC will run checks to ensure neither the Agent nor Provider have already registered with RealEC Technologies in the past.

If the system may have found a potential duplicate, RealEC will auto-generate event code **3315 Potential Duplicate**.

THE LENDER MUST TAKE ACTION BY RESPONDING TO THE EVENT.

If Provider Status is Potential Duplicate or the Lender receives event **3315 Potential Duplicate**:

1. Navigate to the Order Summary page for the Potential Duplicate order by using the Search link in the upper right corner to search by Transaction Number or Loan Number.



Action	Provider Status	Transaction ID	Product Name	Create Date	Loan Number
Resend Email Cancel Order	Potential Duplicate	13461222-491778-1	Commitment/Prelim Rpt	10/18/2015	123
Resend Email Edit Provider Cancel Order	Pending Registration	13461222-491788-1	Commitment/Prelim Rpt	10/18/2015	1245687654
Resend Email Edit Provider Cancel Order	Pending Registration	13461222-491788-1	Commitment/Prelim Rpt	10/18/2015	1245687654

2. Click on the name of the event **3315 Potential Duplicate** (screen shot on the next page).
3. Click Review – this will populate a grid to show the potential duplicates. Please thoroughly review and respond accordingly with either:
 - **Choose Provider:** This will trigger **3316 Confirm Duplicate**: The Provider is already in the database and may have been missed by the lender user who initiated the registration invite.
 - This event will cancel the registration invitation and automatically assign your orders to the correct Provider. Process continues as normal.
 - **Send Original Invite:** This will trigger **3317 Reject Duplicate**: Lender identified this is not a duplicate.
 - Lender identified this is not a duplicate and will route the invitation to the Provider so the Provider may continue with the registration process.



Order Summary

Add Product

Add Doc Signin

Events

Notifications

Documents

test test

Borrower

124312

Loan Number

STATUS

Review
Required

Closing/Escrow

Product Type

Closing & Escrow Services
(PC29)

Product

Events

Add New Event

Expand All

View All Event Details

Select Events to Display ALL

Select

Results to Display

10

3315 Potential Duplicate

Review

November 10, 2015

Posted By: RealEC / Ficus Bank

04:11:51 PM

Read More

Potential Duplicates Found

	Status	Party ID	Agency Name	Address	City	State	Zip	Contact
<input checked="" type="radio"/>	Active	134567	ACME Title Company	1002 Westheimer Rd, Ste. 200	Houston	TX	77056	Phone: 713-1234567 Email: DJones@clearcap.com
<input type="radio"/>	Active	173533	ACME Title Company, LLC	1002 Westheimer Rd, Ste. 200	Houston	TX	77056	Phone: 713-1234567 Email: Sam@acme.com

Total Items:

Page Size: 10

1 / 100

We have found potential duplicate(s) based on the information you gave for the Provider. Please review and select a Provider from the list above, if they were the intended recipient, and click "Choose Provider". Otherwise, click "Send Original Invitation" to send an invite using the Provider information you had given.

3316

Choose Provider

or

Send Original Invitation

3317

100

Service Received

November 10, 2015

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ExchangeTM

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Settlement Agent Self Registration User Guide

Settlement Agents step by step action guide for Agency Registration

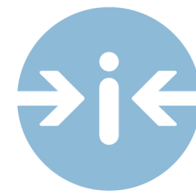


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What is Closing Insight.....	2
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What is Closing Insight™

Closing Insight™, a suite of Web-based technology and workflow solutions was developed by RealEC® Technologies in collaboration with several top lenders, title underwriters and settlement agents to automate the numerous multi-party processes that are required to close a loan.

This Web-based solution delivers a number of process improvements and quality controls to help lenders aggregate fees, generate disclosure documents and reconcile loan estimate data, while helping to ensure process consistency every time. Closing Insight supports the closing process by helping lenders gather loan fee information, collaborate with settlement agents, deliver secure documents within mandated timelines and validate pre-funding and post-closing data.

Closing Insight will help lenders and their business partners satisfy their obligations with CFPB's TILA-RESPA Integrated Disclosure rule.

Agency Registration

Thank you for taking a proactive stand and registering early so that you are prepared to collaborate come August 1, 2015!

The registration process has 2 parts and should not take you longer than **35 minutes**. This User Guide will walk you through every single step to get you registered properly.

Here is an overview of what this process will consist of:

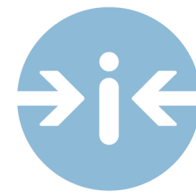
1. **Individual User Registration – 5 minutes**
 - a. Confirming your contact information
 - b. Obtaining and saving your User ID and Password
 - c. Establishing 6 security questions
 - d. Acknowledging the RealEC User Access Agreement

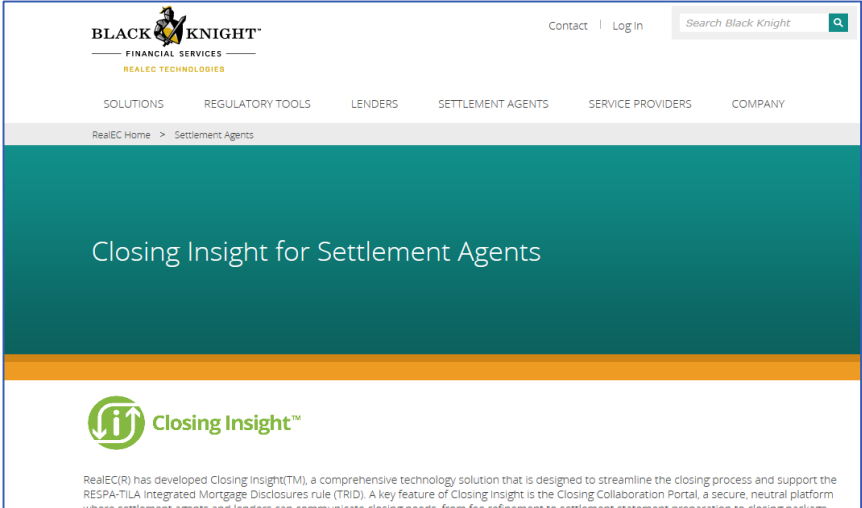
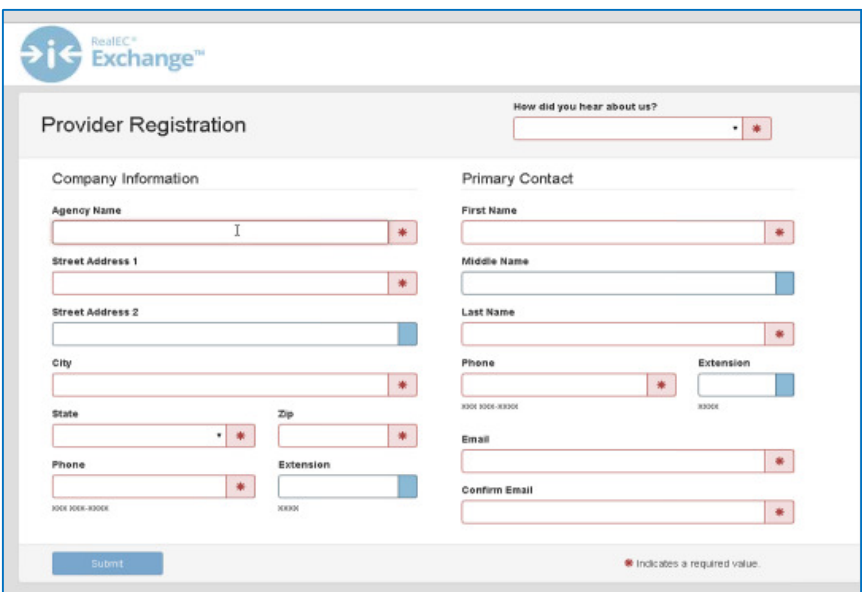

2. **Company Registration – 30 minutes**
 - a. Acknowledging the RealEC Network Access Agreement
 - b. Entering company information, which includes selecting a Software company preference
 - c. Establishing important company contacts
 - d. Adding additional users for the website
 - e. Selecting RealEC products
 - f. Obtaining and saving your PartyID

It's highly recommended you review this User Guide prior to proceeding so that you are prepared with the information that you will need.

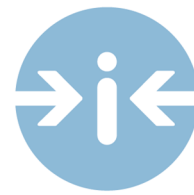
If you still have questions or have any concerns during the registration process, please feel free to contact the **RealEC Closing Insight Support line at: 1-800-893-3241.**


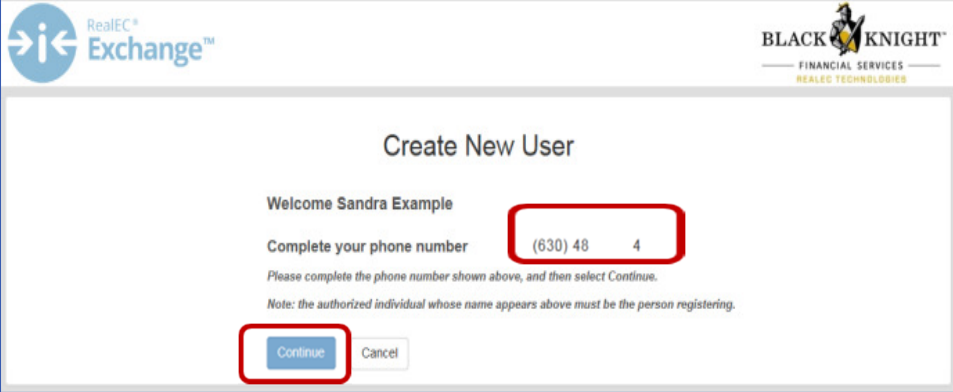
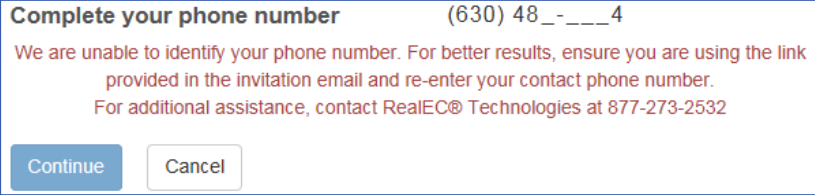




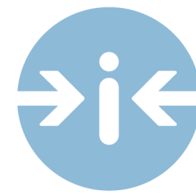
Step #	Page you are viewing with some guidance	Screen Shots with additional guidance
1	<p>Web Pages</p> <p>Click on the following link or copy and paste to a web page to begin your registration process.</p> <p>http://www.bkfs.com/RealEC/DivisionInformation/ClosingInsightSettlementAgents/Pages/default.aspx</p> <ul style="list-style-type: none">• Click <i>Register Here</i>	 <p>The screenshot shows the Black Knight Financial Services website. The header includes the Black Knight logo, 'FINANCIAL SERVICES', and 'REALTEC TECHNOLOGIES'. Navigation links include 'SOLUTIONS', 'REGULATORY TOOLS', 'LENDERS', 'SETTLEMENT AGENTS', 'SERVICE PROVIDERS', and 'COMPANY'. A search bar is present in the top right. The main content area features a large green banner with the text 'Closing Insight for Settlement Agents' and the Closing Insight logo below it. A small text block at the bottom of the banner describes the technology solution.</p>
2	<p>Provider Registration page.</p> <ul style="list-style-type: none">• Complete required information• Click Submit	 <p>The screenshot shows the RealEC Exchange Provider Registration form. It includes a dropdown menu for 'How did you hear about us?'. The form is divided into two main sections: 'Company Information' and 'Primary Contact'. The 'Company Information' section includes fields for Agency Name, Street Address 1, Street Address 2, City, State, Zip, Phone, and Extension. The 'Primary Contact' section includes fields for First Name, Middle Name, Last Name, Phone, Extension, Email, and Confirm Email. A 'Submit' button is located at the bottom left, and a legend indicates that a red asterisk (*) denotes a required value.</p>
3	<p>You will now receive an Invitation email to begin the registration process.</p>	 <p>The screenshot shows a confirmation email from RealEC Exchange. The text reads: 'Thank you for your submission. Please check your email for the registration invitation email and follow the instructions. If you do not see the registration email please check your spam or junk folders to ensure that it has not been removed from your inbox. If you do not receive the registration invitation email please contact RealEC support at 877-273-2532.'</p>





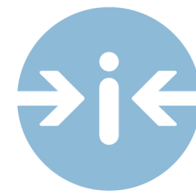
<p>4</p>	<p>Invitation email:</p> <ul style="list-style-type: none">Click on the “Begin Registration” link <p>Note: This link is active for 3 days</p>	
<p>5</p>	<p>Create Your User ID</p> <p>We need to verify your identity</p> <ul style="list-style-type: none">Type in the missing digits of the phone number that you entered in the Provider Registration page (shown in Step 2)Click <i>continue</i> <p>Note: You will have 5 attempts to enter the missing digits of the phone number.</p>	 <p>You will receive this message if the system does not recognize the phone number you provided.</p> 





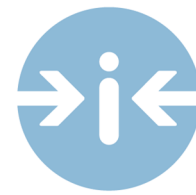
<p>6</p>	<p>Next Steps It's time to complete the Registration Process.</p> <p>Note: You will receive reminder emails at the 24 & 48 hour mark if the entire process has not been completed! In addition, you will have up to 30 days to complete the registration process.</p>	<p>Hello Sandra</p> <p>Welcome to the RealEC Exchange™ registration process.</p> <p>Your Closing Insight Partner has requested that you, as the authorized representative for Example for Self Registering Agent, complete the online Settlement Agency registration process for RealEC Exchange™.</p> <p>The registration process has two parts: Individual User Registration and Company Registration.</p> <p>Individual User Registration is the first part and takes about 5 minutes to complete. The steps include:</p> <ol style="list-style-type: none">1. Confirm your contact information.2. Obtain and save your User ID.3. Obtain your temporary password from a confirmation email.4. Log in to RealEC Exchange™ and change your password.5. Provide answers for several account security questions.6. Acknowledge the RealEC User Access Agreement. <p>Company Registration is the second part and takes about 30 minutes to complete. It consists of gathering details, such as key contact information. RealEC will provide a checklist for the second part momentarily.</p> <p>When you are ready to start the Individual User Registration, please select Continue.</p> <p><input type="button" value="Continue"/> <input type="button" value="Cancel"/></p>
<p>7</p>	<p>Confirm Contact Information</p> <ul style="list-style-type: none">• You will need to re-enter your email to confirm• If no other changes are needed then• Click <i>Continue</i>	<p>Please confirm your contact information</p> <p>The following information was provided by Your Closing Insight Partner as part of the registration invitation. If any information is inaccurate or has changed, please update it below and then select Continue.</p> <p>First Name <input type="text" value="Sandra"/> ✓</p> <p>Middle Name <input type="text"/></p> <p>Last Name <input type="text" value="Example"/> ✓</p> <p>Email <input type="text" value="sandra.s@example.com"/> ✓</p> <p>Confirm Email <input type="text"/></p> <p>Work Phone <input type="text" value="555-555-5555"/> ✓ XXX XXX-XXXX</p> <p>Extension <input type="text"/> XXXX</p> <p>Fax <input type="text"/> XXX XXX-XXXX</p> <p>Extension <input type="text"/> XXXX</p> <p><input type="button" value="Continue"/> <input type="button" value="Back to Previous Page"/></p>

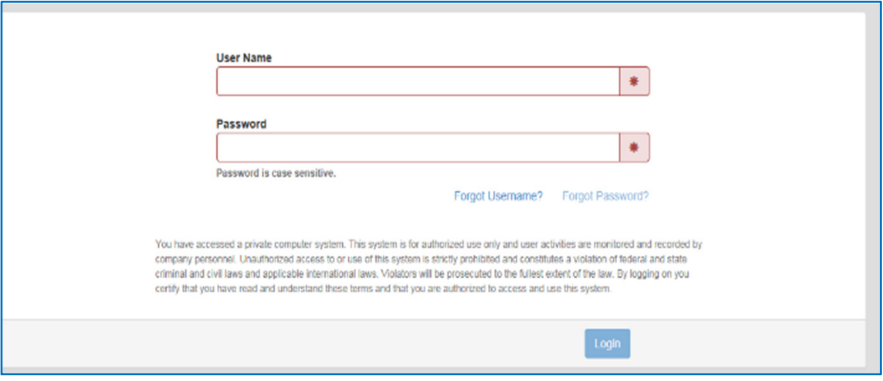
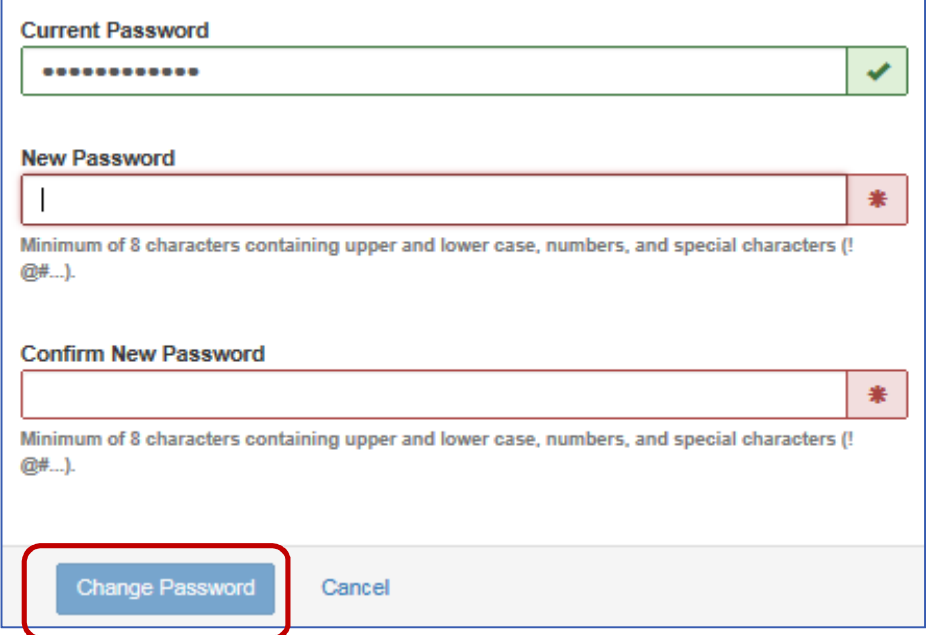




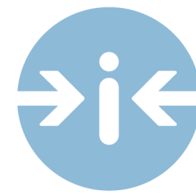
<p>8</p>	<p>Your USER ID</p> <p>Make note of it please!</p> <p>You will receive an automated email message with a temporary password and a link to continue.</p>	<p>Thank you Sandra!</p> <p>We have received confirmation of your contact information and have created a new User ID for you.</p> <p>Your User ID is: SA_208583</p> <p>Please take note of your User ID as you will need it to access RealEC Exchange™ and complete the registration process.</p> <p>RealEC® Technologies also sent an email to you at sandra.vizcarra@realec.com. The email contains a temporary password to use with your User ID and a link to RealEC Exchange™. Please follow the instructions in the message to finish the Individual User Registration process.</p> <p>You may close this page at any time.</p>
<p>9</p>	<p>Temporary Password email</p> <ul style="list-style-type: none">• Capture your Temporary Password• Click on the Launch RealEC Exchange link	<p>Mon 4/6/2015 1:46 PM</p> <p>support@realec.com</p> <p>Black Knight Financial Services Password mail</p> <p>To: Vizcarra, Sandra</p> <p>April 6, 2015</p> <p>Dear Sandra Example,</p> <p>Here are the final instructions for completing the Individual User Registration process for RealEC Exchange™.</p> <ol style="list-style-type: none">1. Connect to RealEC Exchange™ by selecting the link below.2. Log in with your User ID and the following temporary password: Temporary Password: h\$5i9E3Wjdpc3. Once logged in, you will need to create a new password and provide answers to several security questions. <p>Launch RealEC Exchange</p> <p>Sincerely, RealEC Technologies</p>





<p>10</p>	<p>Login Page</p> <ul style="list-style-type: none">• Enter User Name and temporary password that was provided• Click <i>Login</i>.	 <p>Note: You can use the <i>Forgot Username?</i> link if you need to retrieve your Username. You will then be directed to a page to enter your email & last 4 digits of your phone number. Once you click Submit, you will receive an email containing your User Name.</p>
<p>11</p>	<p>Create your Permanent Password</p> <ul style="list-style-type: none">• Enter Temporary Password• Establish new one• Click <i>Change Password</i> <p>Password Requirements:</p> <ul style="list-style-type: none">• Minimum of 8 characters• Need Upper & Lowercase &• Numbers &• Special Characters <p>If all the criteria has been met you will see this in the upper right hand corner.</p>	 <p>Success Password changed successfully.</p>





12

Establish Your Security Questions.

You must establish 6 Security Questions.

This will not only add an extra level of security, but will allow you to reset your own password, should you ever forget it!

RealEC uses security questions as an extra level of security. Select six unique questions and answer combinations that can be used to verify your identity.

Password
 Current Questions 0

To add a question:

- Enter your NEW permanent password
- Click on the **Add More** link – you will get a pop-up
- Click on the drop down to select a question
- Enter your answer in the 2nd field
- Click **Add**

Add Security Question & Answer

Security Questions

Minimum of 4 characters.

Note: The pop-up will remain on the screen, but after you click **Add** you'll see the questions start populating in the background. See example:

Security Questions

You must choose an item from the list

Minimum of 4 characters.

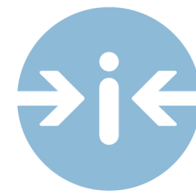
What was the name of your first pet?

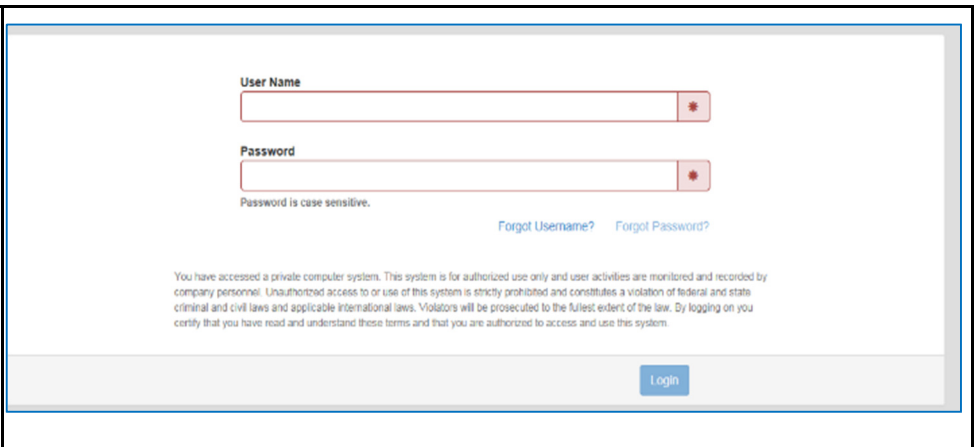
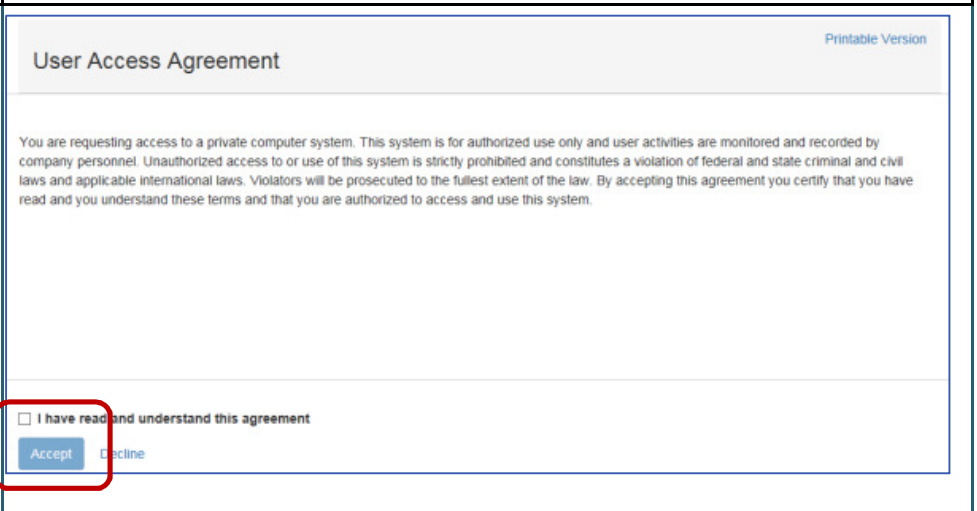
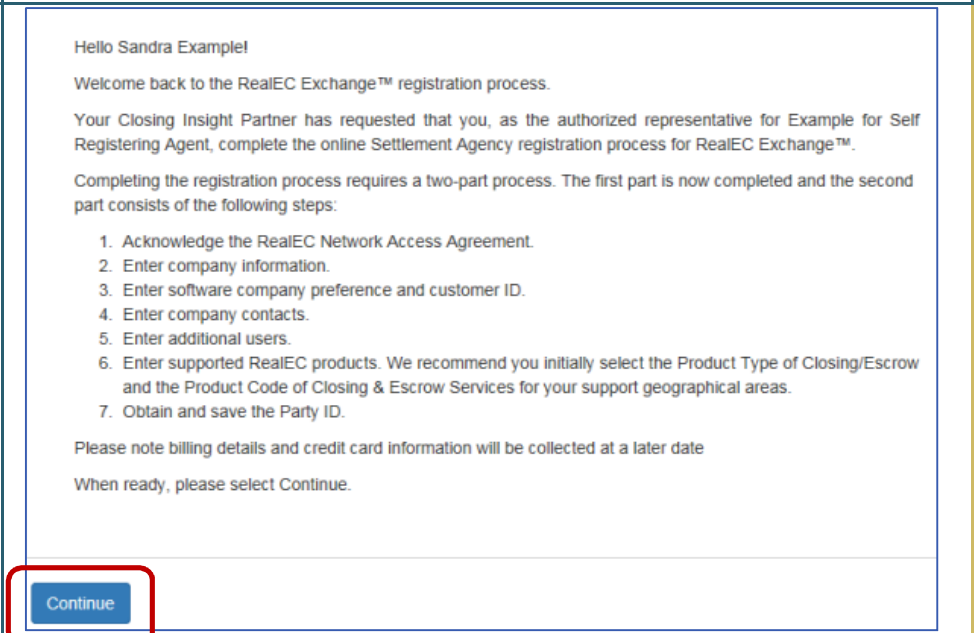
Where were you New Year's 2000?

When you see 6 questions listed in the background, click **Cancel**. This will cancel you out of the pop-up & allow you to see the questions listed. Enter your new permanent password (if still needed) & click **Submit** when you are done.

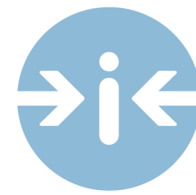
Password
 Current Questions 6
 What was the name of your first pet?
 Where were you New Year's 2000?
 What is the craziest flavor of ice cream you've had?
 What was the first concert you attended?
 What is the first name of the boy or girl that you first kissed?
 What was the name of your favorite teacher in school?

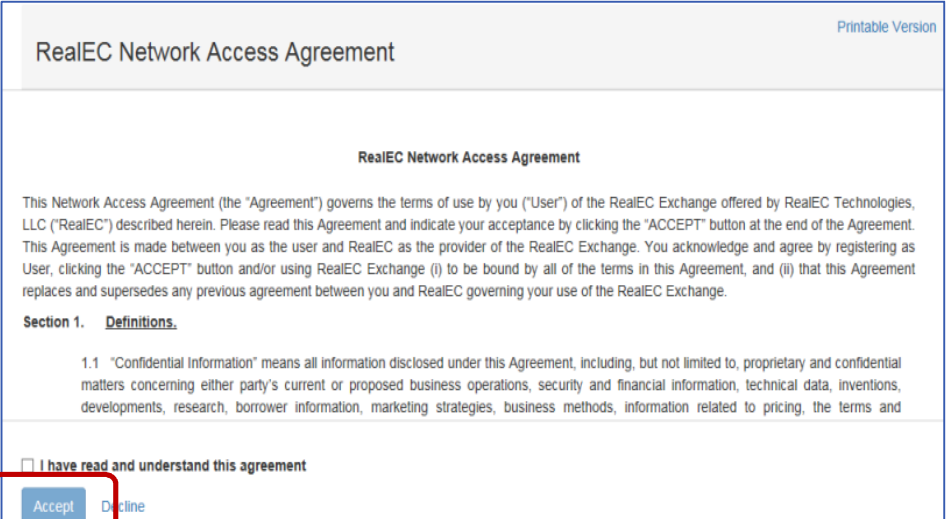
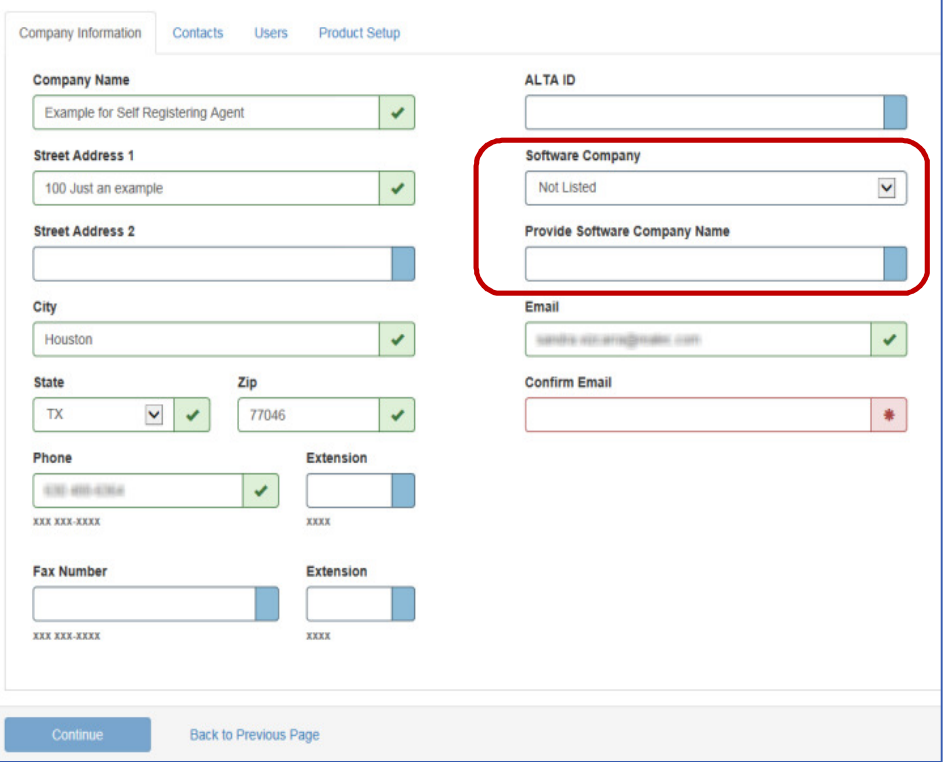




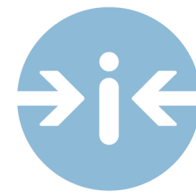
<p>13</p>	<p>Login Screen When you click Submit in Step 12, you will be redirected to the Login Page.</p> <ul style="list-style-type: none">• Enter your <i>User Name</i> and• <i>New permanent password</i>• Click <i>Login</i>	
<p>14</p>	<p>User Access Agreement</p> <p>After reading the User Access Agreement, click in the box to confirm you understand, then click <i>Accept</i>.</p> <p>You can also click on the Printable Version link to keep a copy for your records.</p>	
<p>15</p>	<p>Next Steps</p> <p>It's time to complete the Company Registration Process</p> <p>Click <i>Continue</i> when you are ready to proceed</p>	





<p>16</p> <p>RealEC Network Access Agreement</p> <p>After reading the RealEC Network Access Agreement, click in the box to confirm you understand, then click <i>Accept</i>.</p> <p>You can also click on the Printable Version link to keep a copy for your records.</p>	 <p>Printable Version</p> <h3>RealEC Network Access Agreement</h3> <p>RealEC Network Access Agreement</p> <p>This Network Access Agreement (the "Agreement") governs the terms of use by you ("User") of the RealEC Exchange offered by RealEC Technologies, LLC ("RealEC") described herein. Please read this Agreement and indicate your acceptance by clicking the "ACCEPT" button at the end of the Agreement. This Agreement is made between you as the user and RealEC as the provider of the RealEC Exchange. You acknowledge and agree by registering as User, clicking the "ACCEPT" button and/or using RealEC Exchange (i) to be bound by all of the terms in this Agreement, and (ii) that this Agreement replaces and supersedes any previous agreement between you and RealEC governing your use of the RealEC Exchange.</p> <p>Section 1. Definitions.</p> <p>1.1 "Confidential Information" means all information disclosed under this Agreement, including, but not limited to, proprietary and confidential matters concerning either party's current or proposed business operations, security and financial information, technical data, inventions, developments, research, borrower information, marketing strategies, business methods, information related to pricing, the terms and</p> <p><input type="checkbox"/> I have read and understand this agreement</p> <p>Accept Decline</p>
<p>17</p> <p>Company Information</p> <ul style="list-style-type: none">• Complete all the required fields• Click <i>Continue</i>	 <p>Company Information Contacts Users Product Setup</p> <p>Company Name Example for Self Registering Agent ✓</p> <p>Street Address 1 100 Just an example ✓</p> <p>Street Address 2</p> <p>City Houston ✓</p> <p>State TX ✓ Zip 77046 ✓</p> <p>Phone (555) 456-1234 ✓ Extension</p> <p>XXX XXX-XXXX XXXX</p> <p>Fax Number Extension</p> <p>XXX XXX-XXXX XXXX</p> <p>ALTA ID</p> <p>Software Company Not Listed ✓</p> <p>Provide Software Company Name</p> <p>Email sandra.k@real.com ✓</p> <p>Confirm Email</p> <p>Continue Back to Previous Page</p> <p>Please select your Software Network. If your Software Network does not appear in the list, choose the <i>Not Listed</i> option. This means you will use the RealEC Exchange website to participate in Closing Insight.</p> <p>Note: If you choose <i>Not Listed</i>, please indicate what software you use. RealEC will consider integration opportunities at a later date</p>





18 Primary Contacts

You need to identify the following contacts for this location:

- Primary Contact
- Accounts Payable Contact
- Outage Notifications Contact
- Technical Contact

The **Primary & Accounts Payable** Contact *must* be identified.

Outage & Technical Contacts are *optional*.

Name	Primary	Accounts Payable	Outage	Technical Contact
Sandra Example	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Contact Type

Primary Accounts Payable Outage Technical Contact

First Name: Sandra ✓
Middle Name:
Last Name: Example ✓
Work Phone: (555) 555-5555 ✓ **Extension:**
Fax Number:
Email: sandra@example.com ✓
Confirm Email: sandra@example.com ✓

Buttons: Continue, Back to Previous Page, Save Contact

Tooltip: If you are an integrated partner, enter the contact information for the individual that should be notified of important RealEC announcements, such as maintenance schedules and release notes. Consider entering a key contact from your Systems Integration Team.

Note: By default, you will already be listed as the *Primary Contact* within the grid. You can be both the *Primary & Accounts Payable Contact*, if this is your choice. You can simply click on the Accounts Payable box and then click *Save Contact*.

You can only have 1 Person listed per **Contact Type** of:

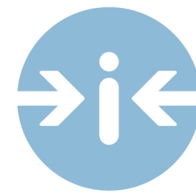
- *Primary*,
- *Accounts Payable, Outage* or
- *Technical Contact*

However, you **cannot** have more than 1 Person listed per Contact Type. For example, you cannot have 2 people listed as the Primary Contacts or 2 people listed as the Accounts Payable contact etc.

To add additional Contacts:

- Enter all required data for the contact, including the Contact Type. (You may hover over the question mark for a description. See example above)
- Click **Add New Contact** (This button will appear where the **Save Contact** button is on this screen shot)
- When you have completed entering all the appropriate Contacts, click *Continue*.





19 Adding Users

Here, you may add Users from your company location that will need access to the RealEC Exchange website.

Once a User is added, they cannot be removed. However, a User can be made **Inactive** by whoever is designated as the **Administrator** through the Functional Role feature.

Note: The **Primary Contact** identified in the previous page, is automatically an **Administrator Role**, so you do not need to add yourself as a User.

These roles can be revised or Users can be added on the Exchange Administrative website. You will receive information in the coming months.

Name	Status	Functional Role
Erika Frenley	Approved	Administrator

Add New User

Selected User Details

User Status

Approved
 Inactive

User Functional Roles

Administrator
 Basic
 Settlement Agent

First Name:

Middle Name:

Last Name:

Email:

Confirm Email:

Same as Company Address?

Street Address 1:

Street Address 2:

City:

State:

County:

Zip:

Work Phone:

Extension:

Fax Number:

Extension:

Continue [Back to Previous Page](#)

To add Users:

- Complete all the required fields for each user, including User Status & User Functional Roles. See note below for definition of these selections.
- Click **Add New User**
- You should see their name populate into the grid
- Continue this process until all users have been added
- Click **Continue**

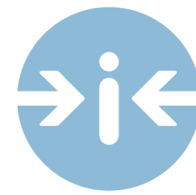
User Status:

- **Approved** – Active and can perform functions related to Functional Role
- **Inactive** – Not active, cannot perform any function

User Functional Roles: Establishes security & privileges for each role.

- **Administrator** – This role has full access to the users for the PartyID. Administrators can add users and change user roles and status.
- **Basic** – This role has basic access to the Exchange website. Basic users can only **view** orders and documents.
- **Settlement Agent** – This role has access to the entire Closing process which includes viewing, uploading docs, sending Event messages and the Closing Insight Collaboration.





20 Product Setup

In this section you will be adding the Products you would like to provide through RealEC.

After making each selection, click *Apply*

Continue this process until all Products have been selected.

Click *Continue*

Product Setup

Product Type Product Code State County

My Products

Remove	Product Type	Product Code	State	County
[x]	Title	Commitment/Prelim Rpt	IL	Kane
[x]	Closing/Escrow	Closing & Escrow Services	IL	Kane
[x]	Document Signing	Document Signing - 1 Set	IL	Kane

For Closing Insight – at a minimum the following must be selected for at least 1 state and 1 county.

Note: You are able to add States and Counties at a later date if needed.

Product Type Title	Product Code Commitment/Prelim R
Product Type Closing/Escrow	Product Code Closing & Escrow Sen
Product Type Document Signing	Product Code Document Signing - 1

21 PartyID

Congratulations! The registration part is complete! **Make note of the PartyID for future reference.**

This PartyID identifies your company to the RealEC teams and the Lenders you do business with.

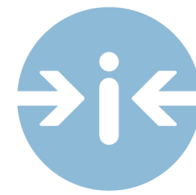
Thank you for registering with RealEC® Technologies!

We have received the information and created our Party ID as 13462579.

Please take note of your Party ID as it identifies your company to RealEC teams, Lenders, and on transactions.

If you entered additional users during the process, they have received an email asking them to confirm their contact information, reset the temporary password, provide security question answers and acknowledge the RealEC User Access Agreement.





Next Steps

Now that you have registered your company you will begin to receive RealEC communications with further instructions.

Any additional Users you entered during this process should now receive an automated email from RealEC. This email will have the user confirm their information, reset their temporary password, establish their security questions and lastly acknowledge the RealEC User Access Agreement.

You may distribute the **Settlement Agent - Individual User Registration** job aid to assist the Users with the steps they need to take to get their account established.

