Agent Instructions Manual

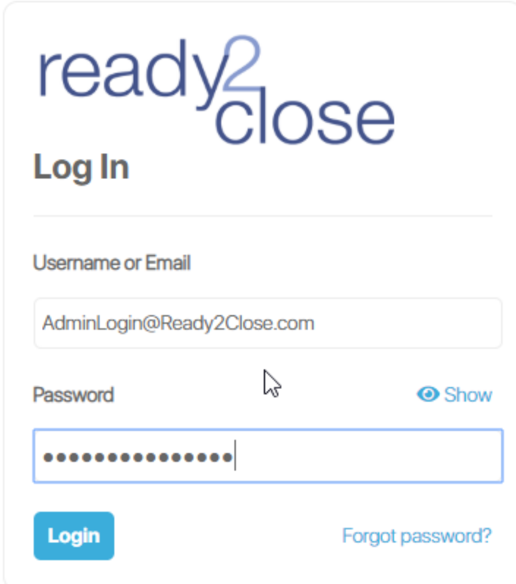
Contact for questions:

Desiree Dyer

ddyer@texastitle.com

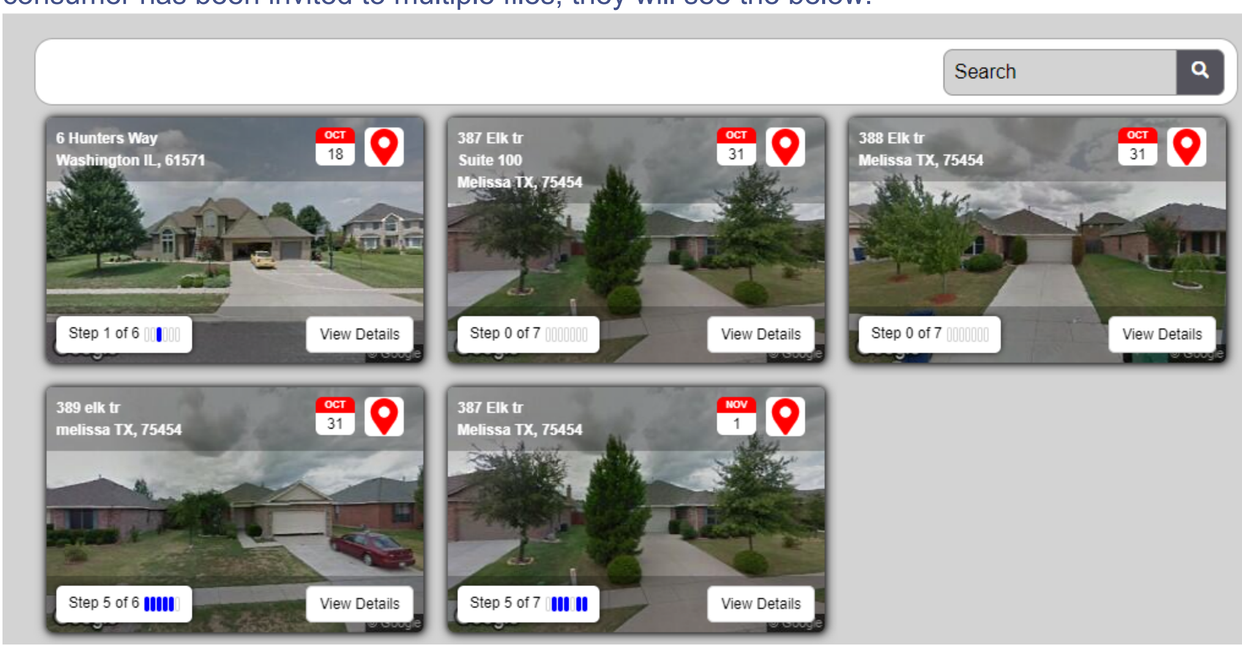
Order Summary

1. Type in your provided default admin credentials



2. Select “Login”

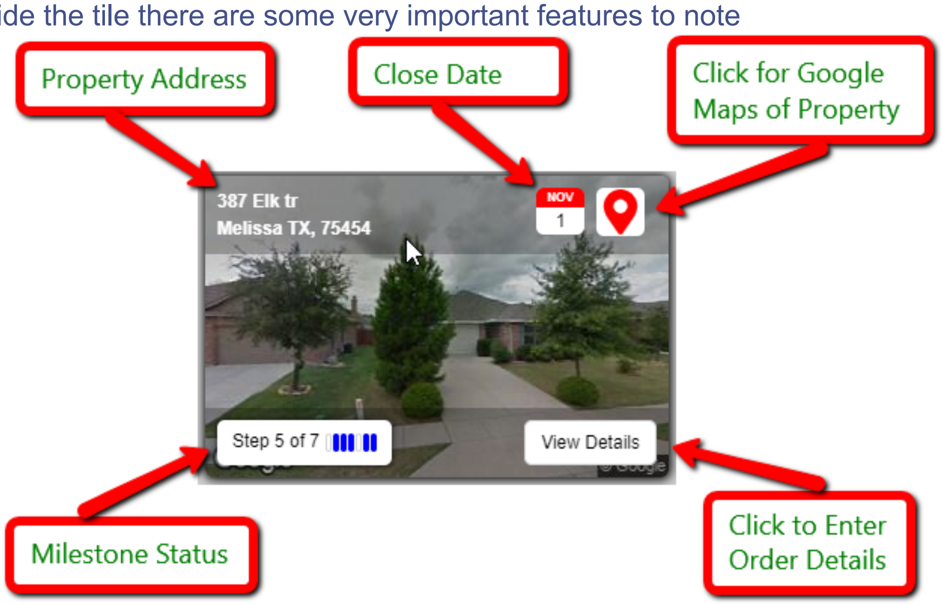
3. If the consumer is only a party to one file, then they will be directed directly into that file. If the consumer has been invited to multiple files, they will see the below.



4. Each tile is representative of one file. The consumer does have the ability to search through their open files if needed.
    a. Type in the search bar

    b. Files can be searched by property or date in the below formats
        i. Closing Date Month (Ex: October)
        ii. Closing date (Ex: 31)
        iii. Closing Date Formats
            1. 10/31/2019
            2. 10-31-2019
        iv. Property Address
            1. Address 1
            2. Address 2
            3. City
            4. State Abbreviation
            5. Zip Code

5. Inside the tile there are some very important features to note



6. Click on “View Details” to enter the file

7. On this page you are presented with many details of the order as outlined below.

8. File Details will be presented that provide important information about the file.

File Details

File Number
R2C_Neil

Property Address
389 elk tr
melissa, TX 75454

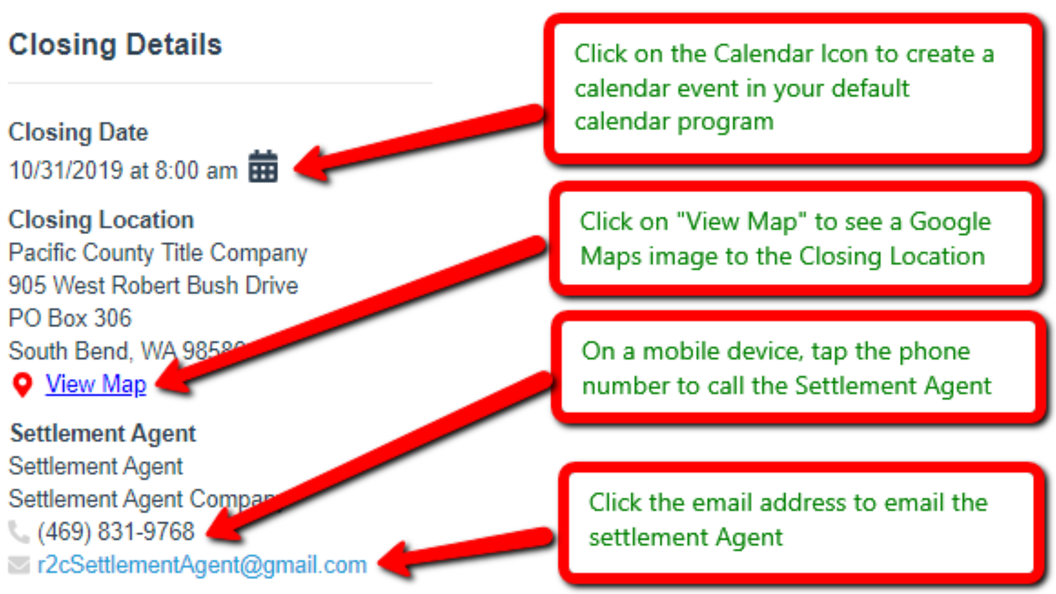
Sales Price
$0.00

Loan Amount
$170,000.00

Buyer(s)
Bobby Buyer

Seller(s)
Sally Seller

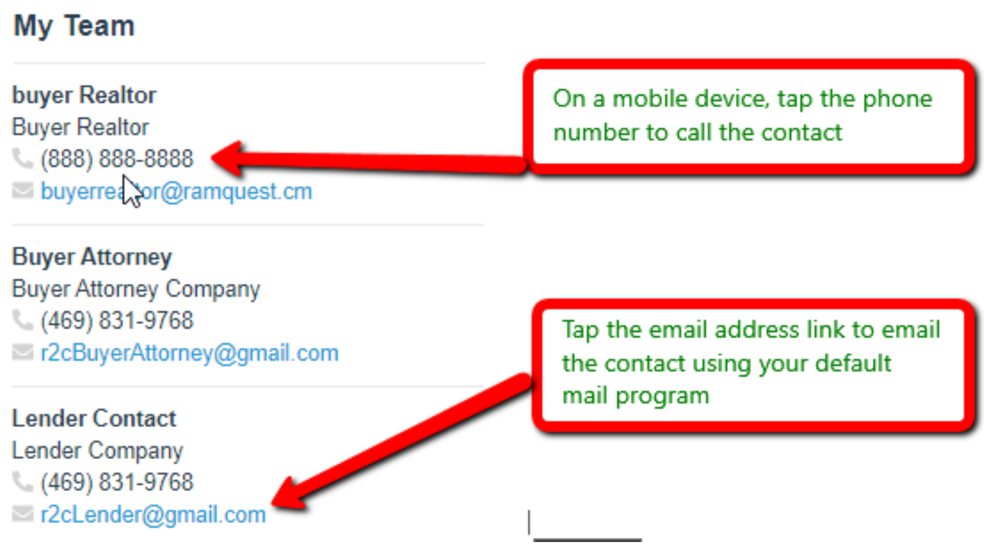
9. There is also closing Details which will provide you with the Closing Date, Closing Location, and a contact for your Settlement Agent.



10. In the My Team Section you can the below contacts of the order.

Sales Representative	Closing Agent	Lender
Title Officer	Title Processor	Escrow Officer
Escrow Processor	Buyer/Seller Realtor	Buyer/Seller Attorney

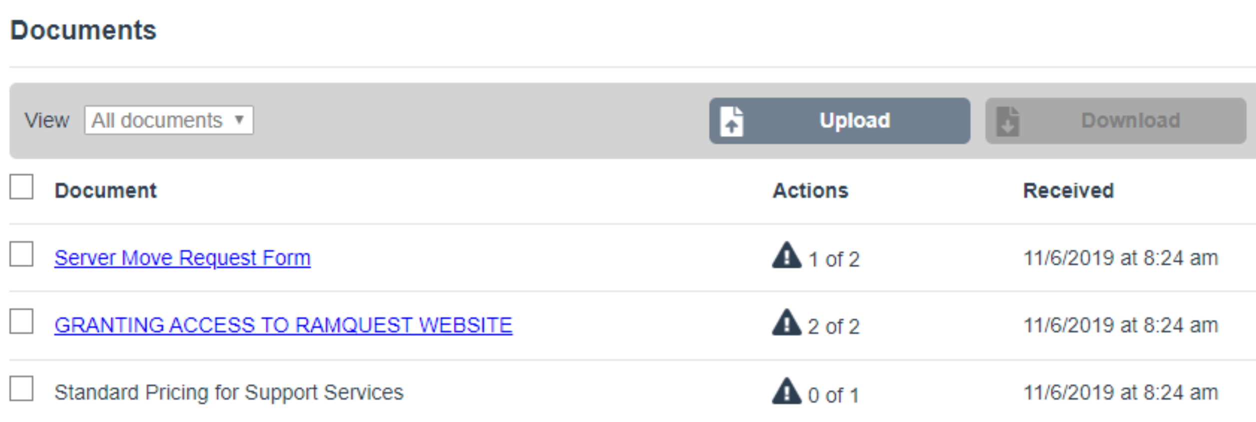
NOTE: What is viewed in the My Team section is configurable by the Title Company



Documents

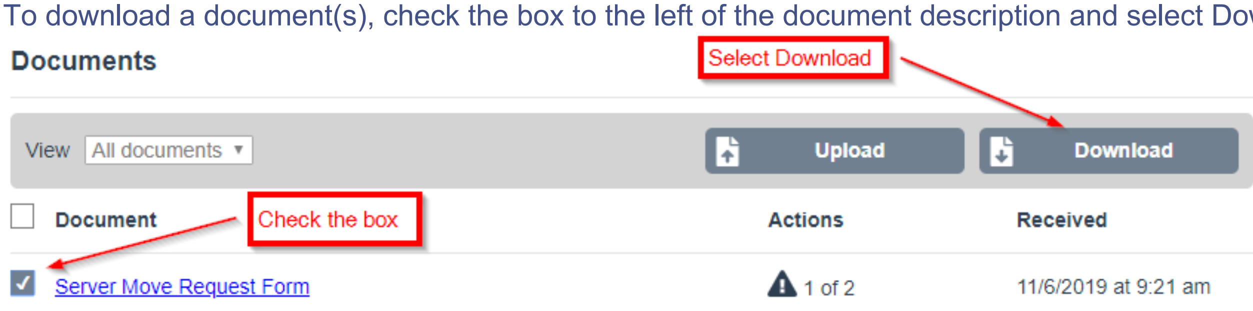
1. Scroll down or click the Documents link in the order header. Documents

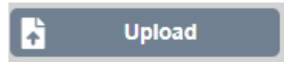
2. From this section, documents that have been shared with the consumer will be listed.



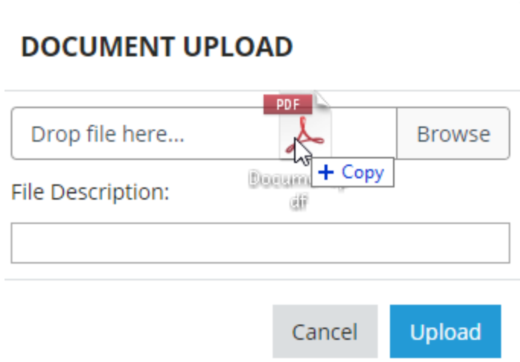
3. From this section a consumer, can download documents, upload documents, and e-sign documents.

4. To download a document(s), check the box to the left of the document description and select Download

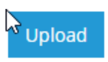


5. To upload a document, select the “Upload” button. 

6. Browse to the document or drag the document into pop-up window document field.

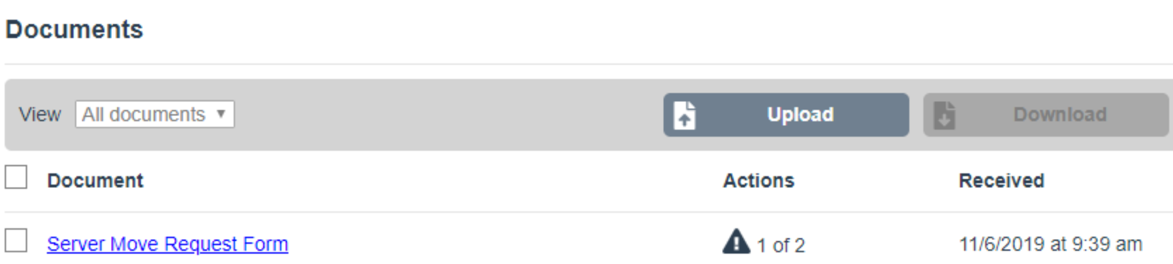


7. Type in the description you would like to apply to the document.

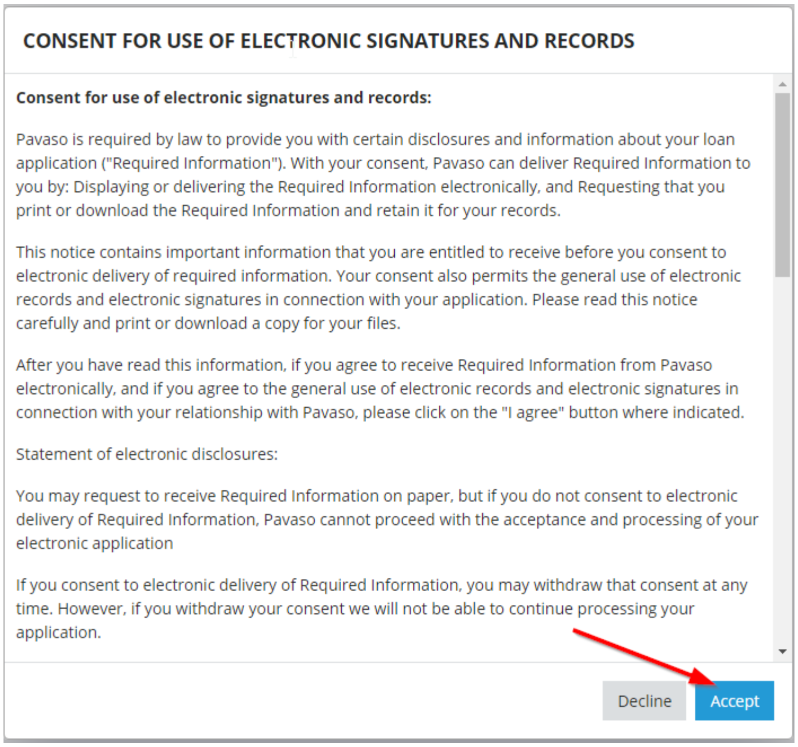
8. Select “Upload” 

   NOTE: Once the document has been uploaded, it will be viewable only by the role that loaded the document. The Title Company can apply permissions in configuration for other roles to see the document.
   NOTE: The uploaded document will be placed into the document management system of the TPS software on the next interval for pushing data to Ready2Close.

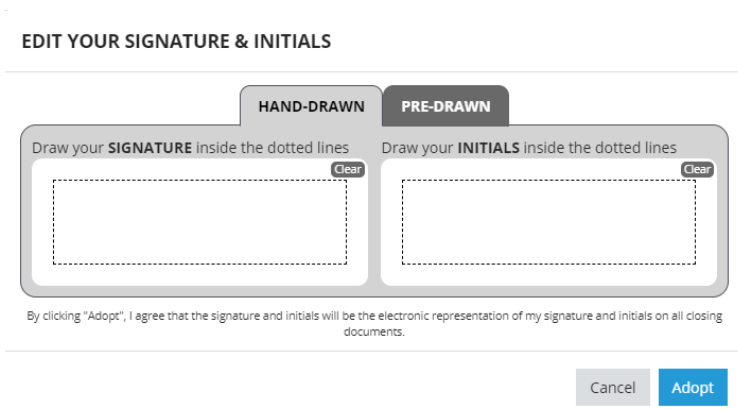
9. Available actions will be displayed to the right of each document.
   a. All documents will have at least one action. This will be for the document to be opened and reviewed.
   b. Some documents can be tagged by the title company for e-signing. These documents will be hyperlinked and show more than one action available.



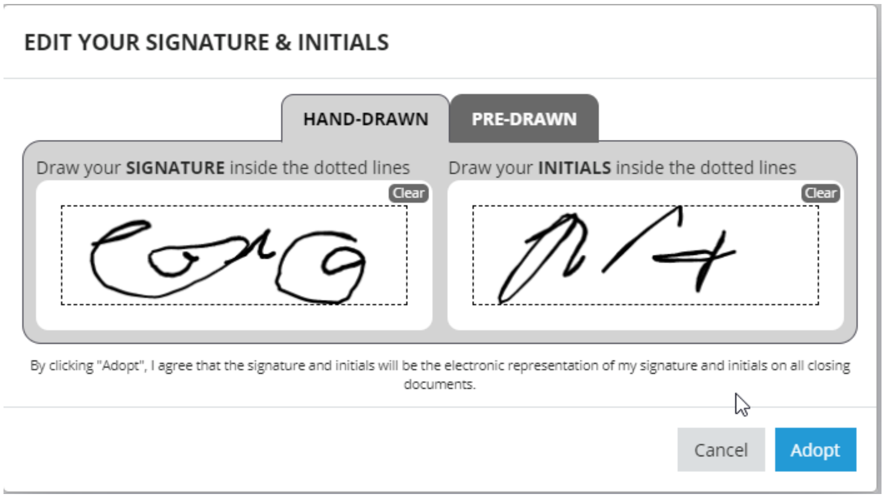
10. If it is the first time that a document is being e-signed on the file, you will be presented with a consent form to agree to. Scroll to the bottom and select “Accept”.



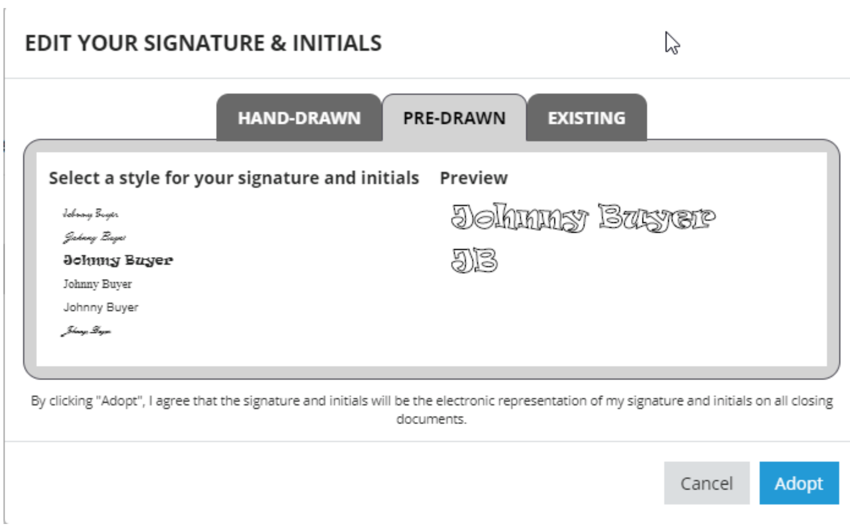
11. If you have not created an electronic signature in the past, you will be prompted to create one.

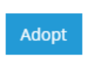


12. On the “Hand-Drawn” tab, you can use your mouse, or finger on a mobile device, to create a signature and initials.



13. If you prefer to use fonts already pre-loaded, you can select the “Pre-Drawn” tab. Select from any of the pre-loaded fonts.

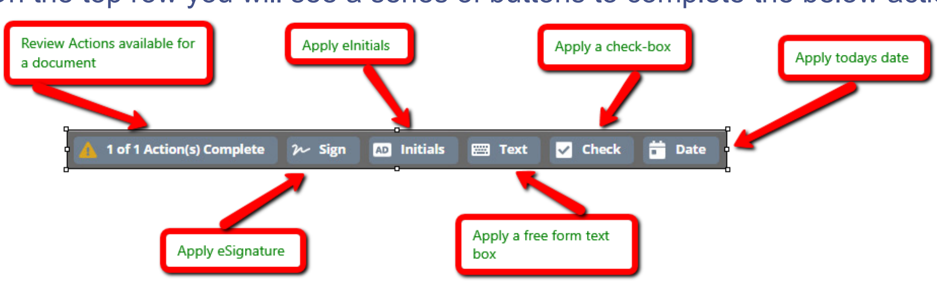


14. Select “Adopt” to save you changes. 

    a. NOTE: E-Signatures can also be edit in your profile.

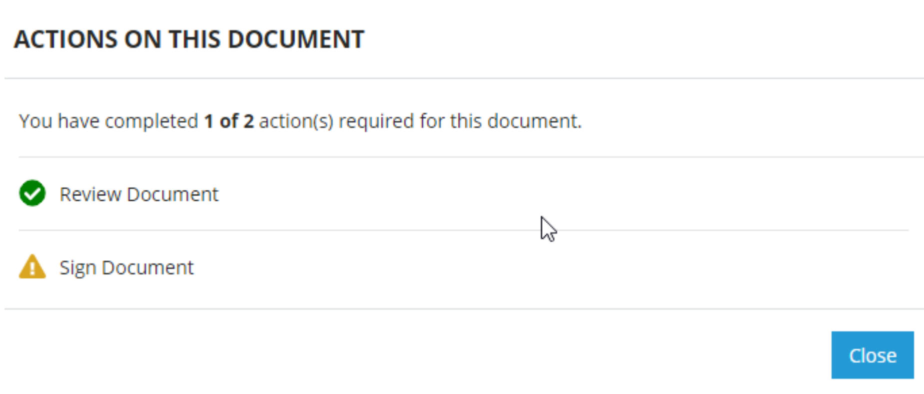
15. Once a Signature has been adopted, a preview of the document will be presented.

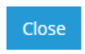
16. On the top row you will see a series of buttons to complete the below actions.



17. View the needed actions on a document by clicking the "Actions button". 

18. You will be presented with a pop up showing you how many and what actions are needed.



19. Select Close to close the window. 

20. To apply a signature, Click on the "Sign" button. 

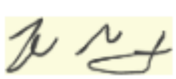
21. Click where you want to apply the signature.

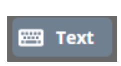
22. Using the buttons indicated below, move and resize the signature as needed.

23. To apply initials, click on the "Init" button. 

24. Click where you want to apply the initials.

25. Using the same buttons as described before, move and resize the initials as needed.



26. To apply a text box, click on the "Text" button. 

27. Click where you want to apply the text box.

28. You can move the text field as needed using the same button as described previously.

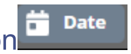
29. Click inside the text box and free form type what is needed.

30. To apply a check box, click on the “Check” button 

31. Click where you want to apply the check box.

32. You can move the check box as needed using the same button as described previously.

33. Click inside the check box to check. You can click it again to un-check.

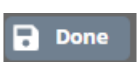
34. To apply todays date, click on the “Date” button 

35. Click where you want to apply the date.

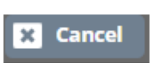
36. You can move the date field as needed using the same button as previously described.

37. To the right of the document preview, each page of the document is listed. You can click on one of the pages to jump to a single section. Pages that require action will display a notification icon on the page.

38. Once all actions have been completed, you can click “Done” on the top right of the preview



39. You can also click on “Cancel” to leave the preview without saving your changes.



40. Closing the document preview will redirect to the File details. In the document section, you will notice that the actions count will update, based on the actions you completed.

NOTE: All changes made to the document will flow back to the file management system of the title production software on the next cycle of data flow.

Wiring instructions

1. Scroll down or select “Wiring Instructions” to navigate to the Wiring Instructions section of the file.
   Wiring Instructions

2. In this section, the configured wiring instruction for the escrow account on the file will be displayed. A contact listing for the Settlement agent will be displayed with clickable links to contact. Also, the bank information will be presented with crucial information for the wiring process.

Configurable instructions for the wiring process

Instructions

Please contact your Escrow Officer when you have originated your wire to ensure proper credit. You will need to reference your escrow number and the exact amount of the wire you have sent when contacting escrow.

PLEASE CONTACT YOUR ESCROW OFFICER IF YOU RECEIVE NOTICE OF A CHANGE TO THESE WIRE INSTRUCTIONS.

ON-LINE BANKING TRANSFERS ARE NOT ALL THE SAME.

Settlement Agent contact information

Contact

Sarah Arnold
XYZ Title Company
(987) 555-4321
r2cSettlementAgent@gmail.com

On a mobile device you can click the phone number to make a call.

Click to generate a new email

Bank Information

Bank Information

American National Bank
8990 West Doge Road
Omaha, NE 68114

Phone
(555) 111-1111

Fax
(555) 222-2222

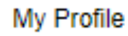
ABA
009054873

Bank Wire Account Number
834200006125

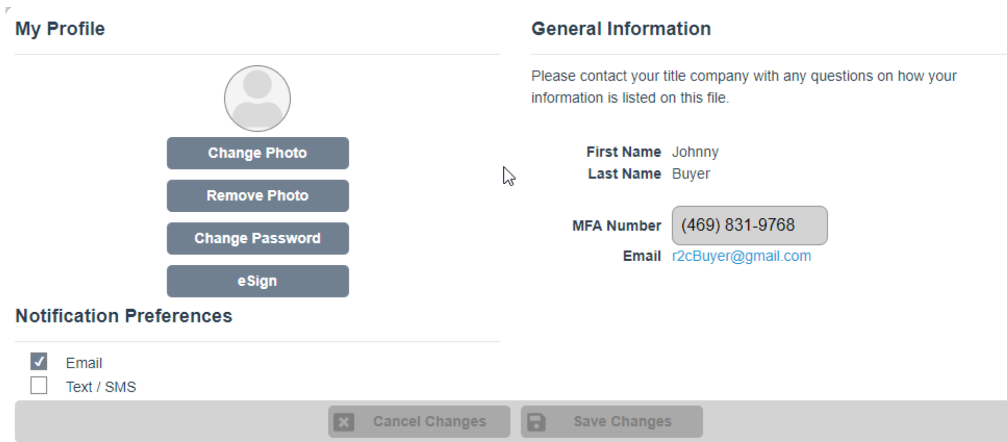
Account Name
American National Bank

Consumer User Profile

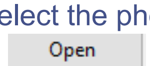
1. Once logged into Ready2Close, there is an icon on the top right you can select to access and edit your user profile. Select the three horizontal lines at the top right of the page. 

2. A pane will open on the left side of the screen. Select "My Profile". 

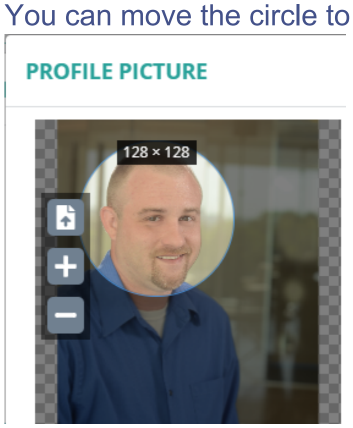
3. A new page will present that gives you some editable options to change key points of your profile.

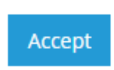


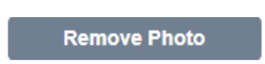
4. Select "Change Photo" to Add/edit your profile picture. 

   a. To upload a photo, click the "upload" button 
   b. Browse and select the photo you want to load.
   c. Select "Open" 

   d. Zoom in or out to align the image circle with what you want to show 
      i. You can move the circle to highlight what you want to display



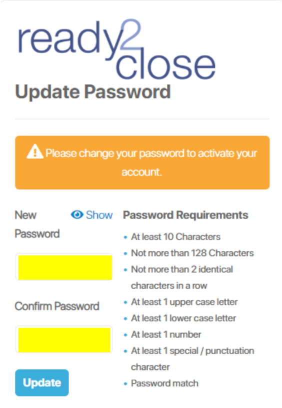
   e. Select "Accept" to save your change 

5. Select "Remove Photo" to remove the profile image 

6. Select “Change password” to Change your password 

    a. You will be prompted with a confirmation
    b. Select “OK” 

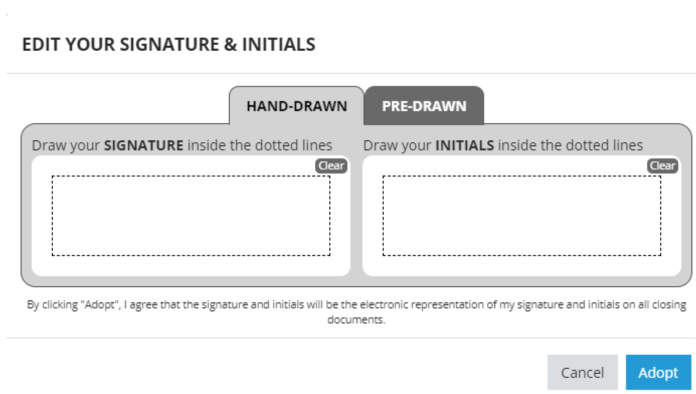
    c. You will be re-directed to the login screen.
    d. Log in again, and will then be prompted with a screen to change your password.



    e. Type in your new password in both highlighted fields above.
        i. The password has requirements that are displayed on the screen and grey out when they have been met.
    f. Select “Update” 

7. To update/add your E-sign signature, select “E-Sign” ADD IMAGE

8. If you have not created an electronic signature in the past, you will be prompted to create one.



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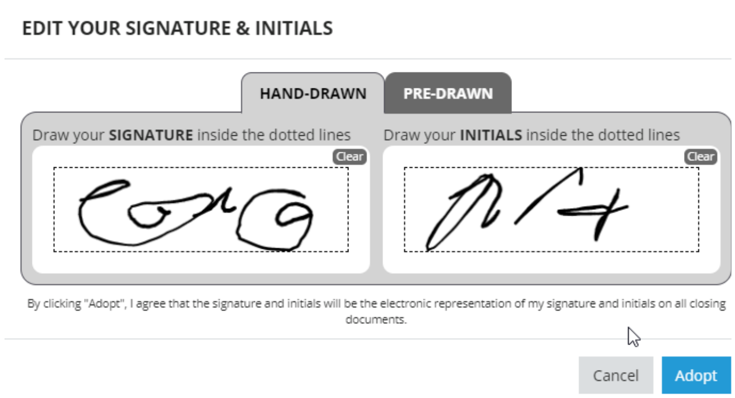
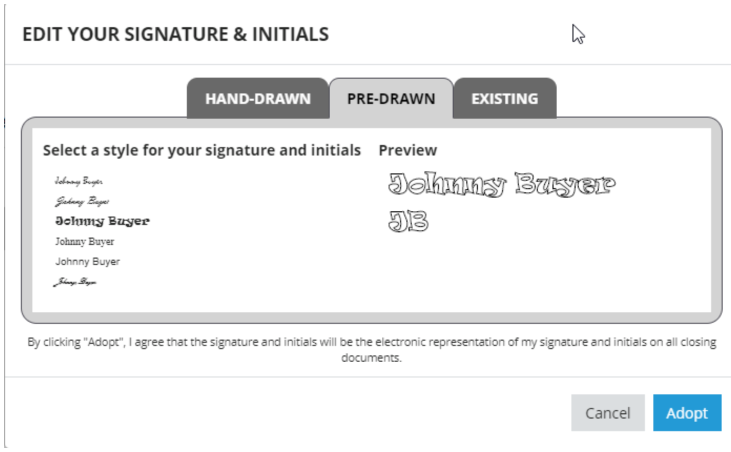
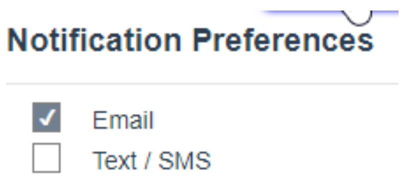


10. If you prefer to use fonts already pre-loaded, you can select the “Pre-Drawn” tab. Select from any of the pre-loaded fonts.



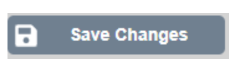
11. Select “Adopt” to save you changes. 

12. You can choose your preferred method of communication in the “Notification preferences” section of the page.
    a. Checking the box will ensure you receive that type of notification.
    b. Un-Checking the box will ensure you do not receive that type of notification. Both are checked by default.



13. In the “General Information” section, you will see your basic user information. The phone number can be changed for the purpose of multi-factor authentication.

NOTE: If the name or email appear to be incorrect, the user will need to contact the title company to update on their side.

14. Select “Save Changes” to save your changes 

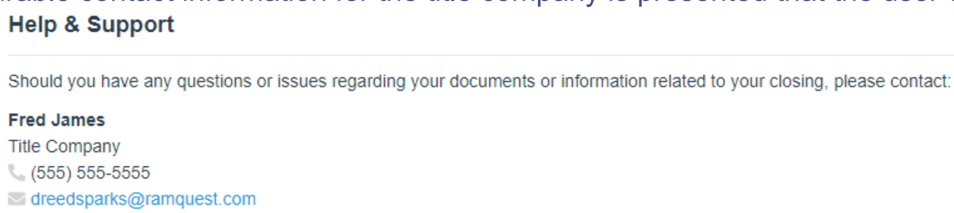
15. Select the button with the three lines and select “Main” to return to your user home page.

Help and Support

1. Select the three horizontal lines at the top right of the page.

2. A pane will open on the left side of the screen. Select "Help and Support". Help & Support

3. Configurable contact information for the title company is presented that the user can contact.



4. Select the three horizontal lines at the top right of the page.

5. Select "Sign Out" Sign Out