



ExchangeTM

Powered by RealEC[®]

Settlement Agent Self Registration User Guide

Settlement Agents step by step action guide for Agency Registration



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Agency (Company) Registration

Thank you for taking a proactive stand and registering with RealEC Technologies so that you are prepared to collaborate by the TRID implementation effective date.

During this process you will be registering to manage Products on the RealEC Exchange website. Within the Exchange is the Closing Insight portal that you will use to collaborate with the Lender in completing the Closing Disclosure form.

The registration process has 2 parts and should not take you longer than **15 minutes**. This User Guide will walk you through every single step to get you registered properly.

Here is an overview of the process:

1. **Administrator Registration – 5 minutes**
 - a. Confirming your contact information
 - b. Obtaining and saving your User ID & PARTY ID
 - i. The PARTY ID will be used to identify your company to Lenders and RealEC
 - c. Obtaining your temporary password
2. **Company Registration – 10 minutes**
 - a. Acknowledging the User Access Agreement & RealEC Network Access Agreement
 - b. Entering company information, which includes selecting a Software company preference
 - c. Billing information
 - d. Establishing important company contacts
 - e. Adding additional users for the website

NOTE: Only one person is required to register the company! Once this person registers the company, they will then be able to grant access for individual users within the company. Individual users will receive an email and follow steps to establish their password and create their profile.

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

The registration site is compatible with Chrome, Firefox, and IE 9 and above.

In addition, as the Administrator of your location you will have access to RealEC's administrative website once you have registered your company. This will allow you to make changes at a later time. The URL will be provided at the end of this document.

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 or by email at providerregistration@realec.com.



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 and providers need to meet today's origination challenges and government mandated regulations.

This comprehensive, Web-based platform supports a lender's and provider'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.

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.





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. http://closinginsight.com</p> <ul style="list-style-type: none"> Click <i>Register Now</i>. 	
2	<p>Provider Registration page.</p> <ul style="list-style-type: none"> Complete required information. Click <i>Submit</i>. <p>You may click on the <i>Frequently Asked Questions</i> links for answers to some of the most common questions!</p>	
3	<p>When you see this message, you may close this window.</p> <p>You should receive the invitation email in your inbox.</p>	





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Invitation email:

Contains 2 options to select from:

Begin Registration link

- For new agents registering the company for the first time.

Use Existing RealEC Account link

- If you are an Administrator setting up a new location and already have an existing account.

Only 1 user per location must register your specific location.

Note: This link is active for 5 calendar days

Mon 8/31/2015 1:33 PM
HD_Support
RealEC Services Invitation mail - DO NOT FORWARD

To: [icon] Vicens, Sandra
Houston, TX, 76044

Dear Linda [icon],

RealEC® Technologies extends an invitation to Closing and Title Services to register with the RealEC Exchange™ as a Service Provider.

Please click the link below to begin registration.

Begin Registration

If you have an existing RealEC User Name, please click the link below if you want to register a new branch or location.

Existing RealEC User Name

Sincerely,
RealEC Technologies

Note: if clicking the link of your choice does not work properly in your email client, follow these steps:

1. Click the link. Your default web browser should open.
2. Copy the entire link address (URL) that appears in the browser's address bar.
3. Open a new internet browser window.
4. Paste the link into the browser's address bar and press enter.

PLEASE DO NOT FORWARD THIS EMAIL. Forwarding this email will disable the links.

For your reference when contacting RealEC - Registration code: 11026-479515

Please DO NOT FORWARD this email! The links will become inactive.

Note: If clicking the link of your choice does not work properly in your email client, follow these steps:

1. Click the link. Your default web browser *should* open.
2. Copy the entire link address (URL) that appears in the browser's address bar.
3. Open a new internet browser window
4. Paste the link address (URL) in the new browser window's address bar.

Use Existing RealEC Account link:

If this option is selected, you will be taken directly to the Exchange login page.

Please Log In With Existing Account

User Name
[text input field]

Password
[text input field]

Password is case sensitive.

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





5 Existing Admin

From the drop down, you will see all the Party ID's that you have access to.
Select <New Party> and click *Continue*.

Order Dashboard Reports Borrower Last Name

You have selected to assign an order to an existing RealEC Account.
Please select the party from the drop-down list below, or select "New Party" if you would like to register a new branch/party.

Order Summary	
Transaction Number:	13467202-16953372
Branch:	
Order Date:	Oct 16, 2015
Address:	20 Greenway Plaza Houston, TX 77020
Loan Number:	1234
Loan Purpose:	Refinance
Loan Amount:	\$100,000.00

Invited Party Information	
Company Name	Test Solicited Agency
Address	600 Greenway Houston, TX 77022
Phone	7139999999
Email	chinh.tran@realec.com

Select the Party ID you would like to use to process the order:

Agency 1234

Agency 1234

<New Party>

Company Name:	Agency 1234
Address:	100 Main St. Houston, TX 77010
Phone:	7139999999
Status:	Active
Training Status:	Not Completed

This Party ID has not completed Closing Insight training. Training must be completed before the order can be processed.

Continue

6 Create New User

We need to verify your identity.

- Type in the missing digits of the phone number that you entered in the Provider Registration page (shown in Step 2)
- Click *Continue*.

Note: You will have 5 attempts to enter the missing digits of the phone number.

Create New User

Welcome Linda Jones

Complete your phone number (480) 551-__1

Please complete the phone number shown above, and then select *Continue*.

Note: the authorized individual whose name appears above must be the person registering.

Continue Cancel

You will receive this message if the system does not recognize the phone number you provided.

Complete your phone number (630) 481-__4

We are unable to identify your phone number. For better results, ensure you are using the link provided in the invitation email and re-enter your contact phone number.
For additional assistance, contact RealEC® Technologies at 877-273-2532

Continue Cancel





7	<p>Welcome Message</p> <p>It's time to complete the Registration Process.</p> <p>Note: You will receive reminder emails at the 24 and 48 hour mark if the entire process has not been completed!</p>	<div data-bbox="560 283 1497 924"><p>Hello Linda!</p><p>Welcome to the RealEC Exchange™ registration process.</p><p>As the authorized representative for Chris Test you must complete the online Service Provider registration process for RealEC Exchange™.</p><p>The registration process has two parts: Administrator Registration and Company Registration.</p><p>Administrator 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 Name.3. Obtain and save your Party ID.4. Obtain your temporary password from a confirmation email.<p>Company Registration is the second part and takes about 10 minutes to complete. It consists of gathering details, such as key contact information.</p><p>When you are ready to start the Administrator Registration, please click Continue.</p><div><input type="button" value="Continue"/> <input type="button" value="Cancel"/></div></div>
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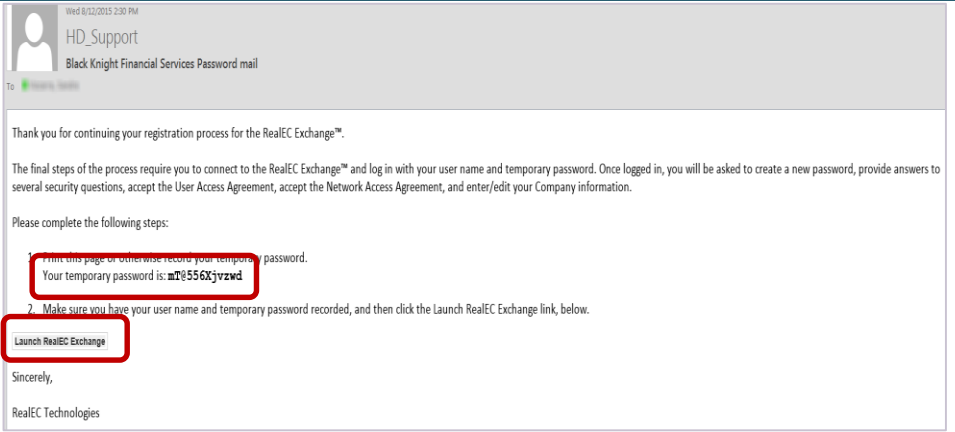
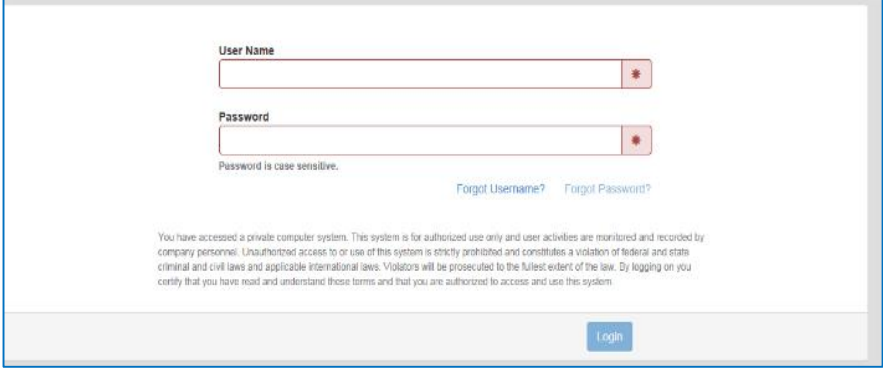
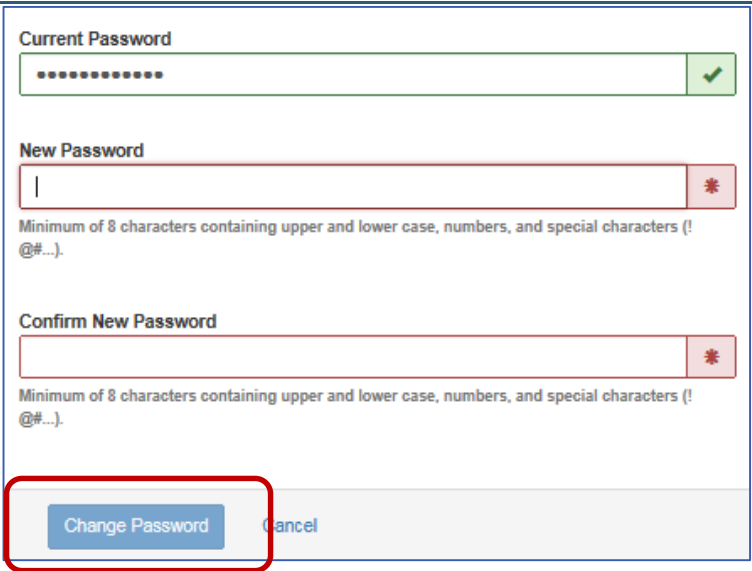




8	<p>Confirm Contact Information</p> <ul style="list-style-type: none">• If no changes are needed then• Click <i>Continue</i>.	<div><h3>Please confirm your contact information</h3><p>The following information was provided as part of the registration invitation. If any information is inaccurate or has changed, please update it below and then click Continue.</p><p>First Name <input type="text" value="Linda"/> ✓</p><p>Middle Name <input type="text"/></p><p>Last Name <input type="text" value="Jones"/> × ✓</p><p>Email <input type="text" value="sandra.vizcarra@realec.com"/> ✓</p><p>Work Phone <input type="text" value="408-555-1234"/> ✓ <small>xxx xxx-xxxx</small></p><p>Extension <input type="text"/> <small>xxxx</small></p><p>Fax <input type="text"/> <small>xxx xxx-xxxx</small></p><p>Extension <input type="text"/> <small>xxxx</small></p><p>➡ Continue Back to Previous Page</p></div>
9	<p>Your USER and PARTY ID will be displayed</p> <p><u>Make note of them please!</u></p> <p>You will receive an automated email message with a temporary password and a link to continue.</p>	<div><p>Thank you Linda!</p><p>We have received confirmation of your contact information and have created a new User Name and Party ID for you. We strongly recommend that you print this page for your reference.</p><p>Next Steps:</p><ol style="list-style-type: none">1. Please take note of your User Name. You will use it to access the RealEC Exchange™ and complete the registration process. Your User Name is: Usr_2129292. Please take note of your Party ID. It identifies your company to RealEC teams and to lenders, as well as on transactions. Your Party ID is: 134650183. Locate the email message RealEC® Technologies sent to you at sandra.vizcarra@realec.com and please follow the instructions in the message to finish the Administrator Registration process. The email message contains a temporary password to use with your User Name and a link to RealEC Exchange™.4. When you are ready to continue, you may close this page.</div> <p>Helpful Tip: Print this page or leave this window open while you continue with the registration. You will need the User Name to log-in, this is your permanent User Name.</p>





10	Temporary Password email <ul style="list-style-type: none">• Capture your Temporary Password.• Click on the Launch RealEC Exchange link.	
11	Login Page <ul style="list-style-type: none">• Enter User ID from step 8. This ID is now your permanent User Name.• Enter the temporary password that was provided in the email.• Click <i>Login</i>.	 <p>Note: You can use the <i>Forgot Username?</i> link if you need to retrieve your Username.</p> <p>You will then be directed to a page to enter your email & last 4 digits of your phone number.</p> <p>Once you click Submit, you will receive an email containing your User Name.</p>
12	Create your Permanent Password <ul style="list-style-type: none">• Enter the Temporary Password.• Establish new password.• Click <i>Change Password</i>.	





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Establish Your Security Questions.

You must establish **6** Security Questions.

These questions 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.

Submit Cancel

To add a question:

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

Add Close

Note: The pop-up will remain on the screen, but after you click **Add** you'll see the questions start populating in the background. You will also notice the **Question Count** start to increase.

When you see 6 questions listed in the background or the Question Count shows 6, click **Close**.

Submit Cancel



This will close out the pop-up and allow you to see the questions listed. Enter your new permanent password (if still needed) and click *Submit* when you are done.


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

Password

..... ✓

Current Questions **6** [Add More](#)

What was the name of your first pet?	✗
What is the first name of the boy or girl that you first kissed?	✗
What was the first concert you attended?	✗
Where were you New Year's 2000?	✗
What was your favorite restaurant in college?	✗
What was your babysitters name when you were little?	✗

 [Submit](#) [Cancel](#)

Upon logging in and accepting the User Access and the RealEC Network Agreements you will begin entering key information regarding the company.

We will walk you through all of the tabs in the next section but they are not all required at this time.

However, at a minimum, the following sections must be completed in this order to complete the registration process:

- **Company Information** – selecting the Software Company
 - RealEC will automatically set-up the products and notifications needed based on this Software selection. We will explain what these are within each specific section.
- **Billing Information** – If you have a promo code, please have it handy. If you do not have a promo code please have a valid credit card available.
- **Contact Information** – Primary, Billing and Partner Approval





14	<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>	<div><div>User Access AgreementPrintable Version</div><div><p>You are requesting access to a private computer system. This system is for authorized use only and user activities are monitored and recorded by company personnel. Unauthorized access to or use of this system is strictly prohibited and constitutes a violation of federal and state criminal and civil laws and applicable international laws. Violators will be prosecuted to the fullest extent of the law. By accepting this agreement you certify that you have read and you understand these terms and that you are authorized to access and use this system.</p></div><div><div><input type="checkbox"/> I have read and understand this agreement</div><div>AcceptDecline</div></div></div> <p>You will not be able to move forward unless you accept the terms.</p>
15	<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>	<div><div>RealEC Network Access AgreementPrintable Version</div><div><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></div><div><div><input type="checkbox"/> I have read and understand this agreement</div><div>AcceptDecline</div></div></div> <p>You will not be able to move forward unless you accept the terms.</p>





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Company Information

The information will be pre-populated with an exception to *Software Company*.

- Select the **Software Company** from the drop-down.
- **Software Company ID** will be pre-populated based on the *Software Company* selection.
- Click *Next*.

Please select your **Software Company**. If your *Software Network* does not appear in the list, choose the *Not Listed* option. You will be required to indicate what software you do use.

If you are unsure, you may select *RealEC Web*. This means you will use the RealEC Exchange website to participate in Closing Insight.

Once saved, you will not be able to make any changes.

If changes are needed you would need to call RealEC Support.

Important information regarding Billing

As a courtesy for registering early, we are waiving registration fees! Please use the following promo code to take advantage of this free offer!

➤ **ClsInstWEB**





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Billing Information

- Complete all the required fields.
- **Promotional Code:** If there is not a Promotional Code listed, and you have a Promotional Code, enter the code then click *Apply*.
- **Billing Preference:** *Paper Billing* is the default Billing Preference. Please complete the Billing address section.
- When complete, please acknowledge the *Financial Acknowledgement*
- Click *Next*
- Proceed to step 18

You have the option to change your *Billing Preference* to *Credit Card*. If you choose this option, please proceed to steps 17 – 21 for guidance on inputting credit card information.

Note: When the billing tab has been completed, you will receive an email confirming your registration has been completed.

Company Billing Contacts Users Products Notifications Insurance License Reports

Billing Information

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

Registration Fee

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

Promotional Code: ☒

Registration Fee:	\$0.00
Annual Processing Fee:	\$0.00
Total:	\$0.00

Registration Fee: RealEC assesses a one-time setup fee upon registration. There will be no charges, if an applicable Promo Code has been entered.

Annual Processing Fee: The Annual Processing Fee is incurred each year during the annual renewal period for each registered company. There will be no charges, if an application Promo Code has been entered.

- If you have been invited to register to receive an order that was sent to you by a lender, the promo code the lender provided with the order will waive both your registration and annual processing fee. You will not incur charges for either.
- If you are registering and there is no order associated with your registration, you will be charged a registration fee and annual processing fee (Paper Billing Only) unless you have a promo code which waives one or both fees.

Billing Method

Billing Preference: ☒ Paper Billing ☒

Please enter the mailing address where we should deliver your monthly paper invoice.

☐ Bill To Address same as Company Address

Company Name: ☒

Cost Center:

Address Line1: *

Bill To Email: *

Address Line2:

Confirm Bill To Email: *

City: *

State: * Zip: *

☐ Financial Acknowledgement *

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

The following is a description of the 3 links in the upper right hand corner:

Frequently Asked Questions:

Most common billing questions answered

Base Level Product Pricing


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

View Billing Report

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





18	RealEC Secure Site You will receive this pop-up informing you that you are being redirected to the RealEC Secure site	<div>Enter/Edit Credit Card Information</div> <div>You will be directed to a RealEC secure site to enter your credit card information. Your Credit Card information must be completed in 5 minutes or your session will expire.</div> <div>CONTINUE CANCEL</div>
19	Credit Card input (If applicable) A form will open in a new window and allow you to enter/update credit card information. <ul style="list-style-type: none">Complete all of the information.When you are done click <i>Submit Transaction</i>.	<div> Exchange™ Powered by RealEC®</div> <div><div>Provider: Title</div><div>Card Number: xxxxxxxxxxxxxxxx</div><div>Card Exp(MM/YY): [dropdown] / [dropdown]</div><div>CSC: xxxx [eye icon]</div><div>First Name: firstname</div><div>Last Name: lastname</div><div>Address Line 1: street address</div><div>Address Line 2: (optional)</div><div>City, State: city [dropdown]</div><div>Zip Code: xxxxx-xxxx</div><div>Phone Type: [dropdown]</div><div>Phone Number: xxx-xxx-xxxx</div><div>Email: name@email.com</div><div>Submit Transaction</div></div> <div>Note: You will have 4 attempts to enter a valid credit card. After the 4th attempt, the account will be locked and you will need to contact RealEC Support to unlock. You have 5 minutes to complete – there will be a timer in the lower right hand corner of the screen</div>
20	New Window The system will alert you to the status of your credit card information and advise you to close the browser tab.	<div>Credit Card Authorized!</div> <div>Your credit card has been authorized. You may now close this browser tab.</div> <div><div>Billing Preference</div><div>Credit Card [dropdown]</div><div>Change Credit Card Refresh</div><div>Your Credit Card information has been successfully received and authorized.</div><div>Status: Authorized</div><div>Expiration Date: 02/2018</div></div> <div>Status: Authorized – a valid credit card has been entered Not Authorized – an invalid credit card has been entered. After four failed attempts, the account will be locked. Contact RealEC Support Locked – 4 failed credit card attempts have been made. Contact RealEC Support to unlock</div> <div>Note: Do not close your entire browser, <u>only close the tab where the credit card information was entered.</u> Upon returning to the Billing tab, you should notice the status of the Credit Card carry into the page.</div>





21	<h3>Financial Acknowledgement</h3> <p>You will need to put a checkmark in the box.</p> <p>Click <i>Next</i> when this page is complete.</p>	<div><div><input checked="" type="checkbox"/> Financial Acknowledgement*</div><div>RealEC will provide an invoice on a monthly basis for the fees and expenses. The invoiced amount must be paid in full on or prior to 30 calendar days after the date of each RealEC invoice. Failure to pay the amount due may impact your ability to participate on the RealEC Exchange and may incur additional charges.</div><div>NEXT</div></div> <p>Select the <i>Financial Acknowledgement</i> checkbox to acknowledge the financial obligations to RealEC.</p> <p>Once the Billing tab has been successfully completed, you may now use the activated tabs at the top of the page to complete the remainder of the sections. <u>There is no specific sequence required to complete these.</u></p> <p>Your login credentials will give you access to the Administrative website allowing you to complete the remainder of the sections at a later time.</p> <div>CompanyBillingContactsUsersProductsNotificationsInsuranceLicenseReports</div>
22	<h3>Primary Contacts</h3> <p>The system will prefill and list you as the <i>Primary, Billing and Partner Approval</i> contact. These 3 contacts are required.</p> <p>If changes are needed, please go into the individual tab to update contact information.</p> <p>Though not required, it is <u>recommended</u> you provide details:</p> <ul style="list-style-type: none">• Technical• Outage	<div><div>Contacts</div><div><div>Contact Information</div><div>PrimaryBillingPartner ApprovalTechnicalOutage</div><div>Enter the contact information for the individual that should be notified if there are any customer service or customer relationship questions. Consider entering a key contact from your Customer Service Team or Business Development Team.</div><div><div><div>First Name</div><div>Linda</div><div>Address Line 1</div><div>987 TitleWay Lane</div><div>Middle Name</div><div></div><div>Address Line 2</div><div></div><div>Last Name</div><div>Jones</div><div>City</div><div>Houston</div><div>Email</div><div>linda.jones@real-ec.com</div><div>State</div><div>TX</div><div>Zip</div><div>76044</div><div>Confirm Email</div><div>linda.jones@real-ec.com</div><div>Contact Phone</div><div>480 555-1111</div><div>Extension</div><div></div><div>Contact Fax</div><div></div><div>Extension</div><div></div></div><div><div>CANCEL</div><div>UPDATE</div></div></div></div><div><ul style="list-style-type: none">• Primary – receives all communications from RealEC• Billing – receives all billing information from RealEC• Partner Approval – approves a lender to do business with on RealEC• Technical – receives technical notes and release notes from RealEC• Outage – receives system outage notifications from RealEC</div><p>You may chose to make any other updates on these tabs if needed and click <i>Update</i> when done.</p></div>





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Add Users

The Users tab will allow you to add other agents from your office location, so they have their personal login credentials.

Note: You will already be listed as a User.

To add Users:

- Click on *Add User* (More details will be provided in the next step)

Users

ACTIVE

Modify	UserName	First Name	Last Name	Phone	Email	Status	Display
	Usr_212372	Linda	Jones	480 555-1111	sandra.vizcarra@realec.com	Active	<input checked="" type="checkbox"/>

Total Items: 1

Page Size: 10

ADD USER

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

UPLOAD NEW USER FILE

PENDING

No records found!

Note: *Upload New User File* is for future enhancements. Please do not use!

Display column - means that the user is visible in the Lender search criteria.

Pending section – When adding a New User, they will be listed in the pending section until they complete their registration.

By inviting a new user, RealEC will generate an email message, similar to your invitation email (**Step 4.**) This individual will be required to complete similar steps as you did in steps 5-13 above.

In addition, this User will be directed to a training page where they will have access to Exchange and Closing Insight material along with short videos that will help to make them familiar with our website and allow them to practice before getting started.





24 Add User pop-up

Enter applicable information for each new user.

Access Permissions:

These will affect the type of edit (or view) rights this User will have.

Click the *Save* or *Save & Close* button when done.

Save will save your progress.

Save & Close will save the information and close the window.

ADD USER

New users must be invited to participate in the REALEC Exchange community. Complete the required information below and they will receive a link to confirm their personal information and their security credentials. After this they will appear in the list of active users

First Name * E-Mail *

Last Name * Confirm Email *

Phone *

The phone number will be used as a part of the process to validate the users identity, please ensure this is known by the user

Select the initial roles that will be assigned to the user

Access Permissions	Select
Admin	<input type="checkbox"/>
Closing Insight Amend	<input type="checkbox"/>
Closing Insight Edit	<input type="checkbox"/>
Closing Insight View	<input type="checkbox"/>
Exchange Order Access All	<input type="checkbox"/>
Exchange Order Access My	<input type="checkbox"/>
Exchange Order Edit	<input type="checkbox"/>

Total Items: 7 Page Size: 10 1 / 1

CANCEL SAVE SAVE & CLOSE

User will receive an email to complete the registration process.

User has 5 days to complete the process. After 5 days the link in the email will become inactive.

Description of Access Permissions: The information you will see is driven by the *Software Company* that was selected earlier in the process. Below are details of each permission **only** if the selection was for RealEC Web

Admin: All access and rights to the Exchange, all access and rights to Closing Insight

Closing Insight Amend: Allows user to respond to analytics within Closing Insight. No edit rights, can view data.

Closing Insight Edit: Allows user full access to Closing Insight functions

Closing Insight View: Allows user to access Closing Insight, but view only rights within the page

Exchange Order Access All*: Has access to view all orders for their company/branch when logged in Exchange

Exchange Order Access My*: Restricts user to viewing only orders assigned to their user name.

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

* *Exchange Order Access All* or *My* is view only access and **must** be combined with *Exchange Order Edit* in order for user to view and edit orders. This does not apply to Closing Insight permissions. However, if the User is participating in Closing Insight, they WILL need to select at least one Exchange role and one CI role.

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





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Products tab

RealEC will automatically configure the products needed based on the Software platform you selected in Step 16.

You have the ability to modify a product. To do so, click on the **box with a pencil** for the product you wish to modify.

To add a product:

- Select the Product Type
- Product Code
- State and County, then
- Click *Apply*.

Products

My Products

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

Filter

Remove	Product Type	Product Description	State	County
[x]	Title	Title Rpt	Texas	Hood
[x]	Title	Commitment/Prelim Rpt	Texas	Hood
[x]	Closing/Escrow	Closing & Escrow Services	Texas	Hood
[x]	Closing/Escrow	Document Signing Service	Texas	Hood
[x]	Title	Property Rpt Plus	Texas	Hood
[x]	Document Signing	Document Signing - 1 Set	Texas	Hood
[x]	Document Signing	Document Signing - 2 Sets	Texas	Hood
[x]	Closing/Escrow	Doc Filing - Insurance Cert	Texas	Hood

Total Items: 8

Page Size: 10

Product Setup

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

Product Type

State

Product Code

County

APPLY

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Notifications

Notifications are email messages that will be triggered by an event. These can be sent by RealEC or the Lender.

RealEC will automatically configure the notifications needed based on the Software platform you selected in Step 16. These configured notifications cannot be removed.

Notifications

ADD DELIVERY LOCATION

Current Events / Notifications

The following notifications are currently set-up for your account. RealEC can also provide additional email notifications when events occur. To add, edit or remove event email notifications, click EDIT. To remove an email address delivery notification entirely, click REMOVE. To remove other types of delivery locations please contact support.

Web

Delivery 1:
Server: *****
Path:

Event	Product Type
Comment (220)	Closing/Escrow
Document Delivery Failed (190)	Closing/Escrow
Product Delivery Failed (160)	Closing/Escrow
Service Cancelled (240)	Closing/Escrow
Service Delayed (250)	Closing/Escrow
Service On Hold (230)	Closing/Escrow
Service Received (100)	Closing/Escrow
Service Resume (260)	Closing/Escrow

You may add an individual and select which event email notifications you would like them to receive by clicking *Add Delivery Location*.





- Enter the email address.

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

- Select the desired *Product Types* and *Events*.
- Click *Add*.

Continue this process until you have selected all the events you want this user to receive.

When you are done with this User,

- Click *Save*.

If you want to add additional event notifications for Users, follow the same process listed in this step.

Notifications

SELECT EVENT / ENTER EMAIL

Delivery New: Email

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

DELIVERY OPTIONS

Send all selected notifications to the following email address

☐ Use user email address on Order

NOTIFICATIONS

Product Types Events

Select	Product Description	Event Description
Total Items: 0		
Page Size: 10		

After clicking Save, you will notice the Notifications tab now has 2 sections listed, *Email* and *Web*. You have the ability to edit and/or remove notifications for the user(s) you input into the system.

Email

Delivery 2:
Default Address:

Event	Product Type
Playoff Delivered (726)	Closing/Escrow
Corrections Completed (791)	Title

Web

Delivery 1:
Server: *****
Path:

Event	Product Type
Comment (220)	Closing/Escrow
Document Delivery Failed (190)	Closing/Escrow
Product Delivery Failed (160)	Closing/Escrow

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License

This section is ONLY required for Appraisers





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Insurance

The Insurance tab allows you to add license information, organized by product.

Click on *Add Insurance* and complete the required fields.

Modify	Product	State	County	Ins. Carrier	Policy#	Coverage	Exp. Date	Active
	Title	FL	[All Counties]	tytery	asdsadsa	\$2543	05/20/2015	Not Active
	Title	FL	[All Counties]	tytery	asdsadsa	\$2543	05/29/2015	Not Active
	Title	FL	[All Counties]	tytery	asdsadsa	\$2543	05/29/2015	Not Active
	Title	FL	[All Counties]	tytery	asdsadsaasa	\$2543	05/29/2015	Not Active
	Title	FL	[All Counties]	tytery	asdsadsaasa	\$2543	01/10/2016	Not Active
	Title	FL	[All Counties]	tytery	asdsadsaasa	\$2543	01/10/2016	Not Active
	Title	IA	[All Counties]	hgrt	454353	\$43546	06/24/2015	Not Active
	Title	TN	[All Counties]	sai	sai	\$234	06/13/2015	Not Active
	Title	TX	[All Counties]	aetna	iheldijriogh	\$1	04/27/2015	Not Active
	Title	TX	[All Counties]	aetna	iheldijriogh	\$1	12/31/2015	Not Active

Total Items: 115 Page Size: 10 1 / 12

ADD INSURANCE **UPDATE**

End Users

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, establish a permanent password, establish their security questions and lastly acknowledge the RealEC User Access Agreement.

Upon the User acknowledging the User Access Agreement, they will move from *pending* to *active* status in the Users tab.

Next Steps

As mentioned at the beginning of this document, now that you have registered your company you will have access to both the Exchange website for Providers and the Administrative site.

Use the below URL(s) to navigate to these websites. You will use the credentials you created through this process to log-in.

Exchange Admin site: <https://Admin.RealECExchange.com>

Exchange Provider site: <https://Provider.RealECExchange.com>

Upon logging into either website, feel free to use the Options menu to find a variety of training resources for the Exchange, Closing Insight and an Admin User Guide.



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