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## 1.0 OVERVIEW

This manual does not cover step by step instructions on every aspect of ResWare. The focus of this procedure is to cover “one-off” situations, and frequently encountered concerns.

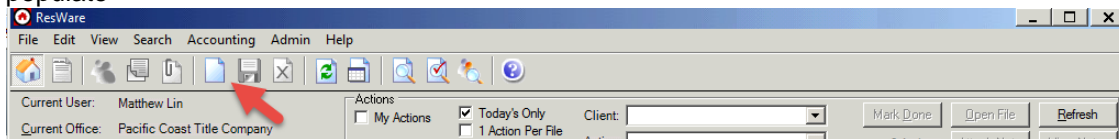
## 2.0 SHORT CUT KEYS

Below are some shortcut keys that can be used within ResWare:

- **F1**: Display help.
- **Ctrl+Shift+F**: Open the File Search window.
- **Ctrl+Shift+A**: Open the Action Search window.
- **Ctrl+Shift+Y**: Open the Partner Search window.
- **Ctrl+Shift+P**: Open the Attach Partner window.
- **Ctrl+H**: Show the Homepage.
- **Ctrl+F**: Show the current file.
- **Ctrl+U**: Show the current file's File Summary report

## 3.0 OPENING A NEW ORDER IN RESWARE

- Once logged into ResWare, begin by clicking on the icon: Create a new file. A New File Wizard screen will populate



- The first screen that will populate is the property information screen. Fill out as much information as available. At the minimum, a street number, street name, zip, city, state, and county are required. Click next when property information has been entered.
  - Note: by keying in the zip code, ResWare will automatically fill in the city, state, and County fields.

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- c. The file information screen will now populate. This is where the client information will be selected.
- d. Click the search button to locate an existing client.

**New File Wizard**

**File Information**

**Client**

Client:

Filter Client List:

Client Special Instructions/Comments:

Client's Client:

Client's File Number:  Sales Price:  Mortgagees:

- e. Locate the appropriate client (in this example, Mariposa Escrow has been identified as the client)
- f. Highlight the desired client, and click Select

**Search/Add Partner**

**Company**

Company Name:  Abbreviation:  Partner Type:

**Restriction**

Restriction Type:  State:  Transaction Type:  Product Type:

**Employee**

First Name:  Last Name:  Email Address:

Found 7,073 Companies

**Search Results**

System ID	Partner Company	ProperName
13291	Manners Escrow	Glendale Office
13301	Mariposa Escrow	Glendale Office
13305	Mark 1 Mortgage	Glendale Office
13309	Market Street Escrow	Glendale Office
13368	Medallion Mortgage	Glendale Office
13370	Melrose Escrow Inc	Glendale Office

**Name** **Email** **Phone** **Cell Phone** **Title** **System ID**

						13302
						13303
						13304
Bibera, Cecilia B.	chibera@mariposaescrow.com					24319

- g. An employee of the client must be selected. Click on the primary check box associated with the desired employee.
- i. If an employee is not listed under the client, click the new button to create a new employee
- ii. If an employee information is incorrect, highlight the employee, and click edit to correct the employee information

**New File Wizard**

**File Information**

**Client**

Client:

Filter Client List:

Client Special Instructions/Comments:

Client's Client:

Primary	Secondary	Name	Title
<input type="checkbox"/>	<input type="checkbox"/>		
<input type="checkbox"/>	<input type="checkbox"/>		
<input type="checkbox"/>	<input type="checkbox"/>		
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Bibera, Cecilia B.	
<input type="checkbox"/>	<input type="checkbox"/>	Ramirez, Sandy	
<input type="checkbox"/>	<input type="checkbox"/>	Tubles, Meng	

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- h. In the transaction type dropdown, select the appropriate transaction type

**New File Wizard**

**File Information**

**Client**

Client: Mariposa Escrow

Filter Client List: [ ] New... Edit... Search...

Client Special Instructions/Comments: [ ]

Client's Client: [ ] New... Edit...

Primary	Secondary	Name	Title
<input type="checkbox"/>	<input type="checkbox"/>		
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Bibera, Cecilia B.	
<input type="checkbox"/>	<input type="checkbox"/>	Ramirez, Sandy	
<input type="checkbox"/>	<input type="checkbox"/>	Tubles, Meng	

Client's File Number: [ ] Sales Price: [ ]

Transaction Type: [Commercial] Loan Amount: [ ]

Product Type: [Residential] Loan Number: [ ]

Source of Business: [ ] Cash Out Amount: [ ]

Mortgages

First Mortgagee: [ ]

Second Mortgagee: [ ]

☒ Use 2010 HUD

- i. Once the appropriate transaction type has been selected, utilize the product type dropdown to select the desired product type for the client.

**New File Wizard**

**File Information**

**Client**

Client: Mariposa Escrow

Filter Client List: [ ] New... Edit... Search...

Client Special Instructions/Comments: [ ]

Client's Client: [ ] New... Edit...

Primary	Secondary	Name	Title
<input type="checkbox"/>	<input type="checkbox"/>		
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Bibera, Cecilia B.	
<input type="checkbox"/>	<input type="checkbox"/>	Ramirez, Sandy	
<input type="checkbox"/>	<input type="checkbox"/>	Tubles, Meng	

Client's File Number: [ ] Sales Price: [ ]

Transaction Type: [Residential] Loan Amount: [ ]

Product Type: [Loan: Title and Escrow] Loan Number: [ ]

Source of Business: [ ] Cash Out Amount: [ ]

Mortgages

First Mortgagee: [ ]

Second Mortgagee: [ ]

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Ancillary Products

There are no Ancillary Products available for this Product Type.

- j. Key in the appropriate sale price and/or loan amount
- k. Click Next

**New File Wizard**

**File Information**

**Client**

Client: Mariposa Escrow

Filter Client List: [ ] New... Edit... Search...

Client Special Instructions/Comments: [ ]

Client's Client: [ ] New... Edit...

Primary	Secondary	Name	Title
<input type="checkbox"/>	<input type="checkbox"/>		
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Bibera, Cecilia B.	
<input type="checkbox"/>	<input type="checkbox"/>	Ramirez, Sandy	
<input type="checkbox"/>	<input type="checkbox"/>	Tubles, Meng	

Client's File Number: [ ] Sales Price: \$500,000.00

Transaction Type: [Residential] Loan Amount: \$300,000.00

Product Type: [Sale: Title and Escrow] Loan Number: [ ]

Source of Business: [ ] Cash Out Amount: [ ]

Mortgages

First Mortgagee: [ ]

Second Mortgagee: [ ]

☒ Use 2010 HUD

Ancillary Products

There are no Ancillary Products available for this Product Type.

Help < Back Next > Finish Cancel

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- l. A Buyer Information screen will populate. Key in appropriate buyer information, and then click next

**Buyer Information**

Type: Individual Buyer

Primary: Prefix First Middle Last Suffix  
Bob Buyer

Signature Line:  
Vesting 1:  
Secondary: Prefix First Middle Last Suffix  
Signature Line:  
Vesting 2:  
Ownership Vesting:  
Additional Vesting:  
Interest:

Contact Information  
Phone:  
Work Phone:  
Mobile Phone:  
Fax:  
Primary Email:  
Secondary Email:  
Preferred Communication:

Tax Information  
Primary SSN/Tax ID:  
Secondary SSN/Tax ID:

Website Access  
☐ Enabled  
Username:  
Password: [Not Set]  
Create/Reset Password  
Email to User  
Display on Screen  
Generate

Send Documents As  
☒ Attachments ☐ Weblinks

Buyer/Seller Created  
By: Matthew Lin  
On: ID:

Addresses  
Current  
☐ Same as Property Address  
Street Address 1:  
Street Address 2:  
ZIP: Override  
City: State: County:  
Post Closing  
Same as: ☐ Property Address ☐ Current Address  
Street Address 1:  
Street Address 2:  
ZIP: Override  
City: State: County:  
Use on Checks:

Help < Back Next > Finish Cancel

- m. For Sale files, a Seller Information screen will populate. Key in appropriate seller information, and then click finish. The order will now be open in ResWare

**Seller Information**

Type: Individual Seller ☐ Needs 1099-S Allocated %: Allocated \$:

Primary: Prefix First Middle Last Suffix  
Sam Seller

Signature Line:  
Vesting 1:  
Secondary: Prefix First Middle Last Suffix  
Signature Line:  
Vesting 2:  
Ownership Vesting:  
Additional Vesting:  
Interest:

Contact Information  
Phone:  
Work Phone:  
Mobile Phone:  
Fax:  
Primary Email:  
Secondary Email:  
Preferred Communication:

Tax Information  
Primary SSN/Tax ID:  
Secondary SSN/Tax ID:

Website Access  
☐ Enabled  
Username:  
Password: [Not Set]  
Create/Reset Password  
Email to User  
Display on Screen  
Generate

Send Documents As  
☒ Attachments ☐ Weblinks

Buyer/Seller Created  
By: Matthew Lin  
On: ID:

Addresses  
Current  
☐ Same as Property Address  
Street Address 1:  
Street Address 2:  
ZIP: Override  
City: State: County:  
Post Closing  
Same as: ☐ Property Address ☐ Current Address  
Street Address 1:  
Street Address 2:  
ZIP: Override  
City: State: County:  
Use on Checks:

Help < Back Next > Finish Cancel

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- n. Once the order is opened in ResWare, add all the partners that need to be associated with the file. Some examples of partners could include, but are not limited to the following:
- i. Tax Collector (Note: tax collector will automatically be added to the file)
  - ii. Escrow Officer (Note: by adding the Escrow Officer, the system will automatically add the Escrow Office)
  - iii. Title Officer: (Note: by adding the Title Officer, the system will automatically add the Title Office)
  - iv. Listing Agent
  - v. Selling Agent
  - vi. Outside Escrow Office
  - vii. Marketing Rep
  - viii. Underwriter (Note: by adding the Title Officer, the system will automatically add in Commonwealth as the underwriter)
- o. Begin adding partners by clicking on the add partner button. An example of adding PCT – Glendale title will be shown

The image shows a screenshot of the ResWare software interface. The window title is 'ResWare'. The menu bar includes File, Edit, View, Search, Accounting, Admin, and Help. The toolbar contains various icons for file operations. The main window is divided into several sections. On the left, there's a 'File Information' section with fields for Status (Open), Client (Mariposa Escrow), Source, File Origin (Internal), and Product (Residential: Sale: Title and Escrow). Below this is the 'System ID' (55). In the center, there's a 'Dates' section with fields for Estimated Settlement, Actual Settlement, Contract Received, Contract Close, Disbursement, and Rcvd Sale Notification. To the right of this is an 'Other Information' section with fields for Commitment #, Search #, Client's File #, and 2nd File #. Further right is a 'Teams Available for Assignment' section with an 'Add' button. Below the 'Dates' section is a 'Coordinator Assignment' table with columns for Type and Team or User. The bottom section is titled 'Partners/Buyers/Sellers/Property' and contains a table with columns: Type, Name, Address, Phone, Primary Employee, Employee Phone, and Employee Cell. The table has four rows: Property (423 Test Street, Beverly Hills, CA 90210 (Los Angeles)), Buyer (Bob Buyer), Seller (Sam Seller), and Client/Source of Business (Mariposa Escrow, 11080 Artesia Blvd., Suite E, Cerritos, CA 90703, Bibera, Cecilia B.). To the right of this table are buttons for 'Add Partner...', 'Add Property...', 'Add Buyer...', 'Add Seller...', 'View...', and 'Remove'. A red arrow points to the 'Add Partner...' button.

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- p. Locate the appropriate partner type.
  - i. In this example, Pacific Coast Title Company – Title Office has been selected
- q. Click Search

Search/Add Partner

Company Name: [ ] Abbreviation: [ ] Partner Type: [ ]

Restriction Type: [None] State: [ ]

Employee First Name: [ ] Last Name: [ ] Email Address: [ ]

Search [ ] Clear [ ]

Outside Escrow Company  
Outside Title Company  
Pacific Coast Title Company - Escrow Office  
Pacific Coast Title Company - Escrow Officer  
**Pacific Coast Title Company - Title Office**  
Pacific Coast Title Company - Title Officer  
Payoff Lender

- r. Select the appropriate Partner, and then click add to file

Search/Add Partner

Company Name: [ ] Abbreviation: [ ] Partner Type: [Pacific Coast Title Company - Title] Transaction Type: [ ] Product Type: [ ]

Restriction Type: [None] State: [ ]

Employee First Name: [ ] Last Name: [ ] Email Address: [ ]

Search [ ] Clear [ ] Configure Fees... [ ]

Found 4 Companies

System ID	Partner Company	ProperName	Location
528	Pacific Coast Title Company - Glendale Title	Glendale	Glendale
527	Pacific Coast Title Company - NoCal Title	Pleasanton	Pleasanton
510	Pacific Coast Title Company - Orange Title	Orange Title	Orange
529	Pacific Coast Title Company - Oxnard Title	Oxnard	Oxnard

Add to File [ ] View [ ] Display Fees [ ] New... [ ]

- s. The desired partner type will now be shown in the file

ResWare

File Edit View Search Accounting Admin Help

General Actions Notes Documents Shipping Search Data Curative Signings Recording Policy New Loans Settlement Receivables

File Information Status: [Open] Client: Mariposa Escrow Source: [ ] File Origin: Internal Product: Residential: Sale: Title and Escrow System ID: 55

Dates Estimated Settlement: [ ] Actual Settlement: [ ] Contract Received: [ ] Contract Close: [ ] Disbursement: [ ] Rcvd Sale Notification: [ ]

Opened: 4/23/2014 9:57 AM Opened By: Matthew Lin Closed: [ ]

Other Information Commitment #: [ ] Search #: [ ] Client's File #: [ ] 2nd File #: [ ]

Related Files File Relationship

Teams Available for Assignment Add [ ] Remove [ ]

Coordinator Assignment Type Team or User Joint Plant Coordinator Not Assigned

Type	Name	Address	Phone	Primary
Property		423 Test Street, Beverly Hills, CA 90210 (Los Angeles)		
Buyer	Bob Buyer			
Seller	Sam Seller			
Client/Source of Business	Mariposa Escrow	14000 Artesia Blvd., Suite E, Cerritos, CA 90703		Bibera, C
Pacific Coast Title Company - Title Office	Pacific Coast Title Company - Glendale Title	100 W. Glenoaks Blvd, Suite 100, Glendale, CA 91202	(818) 662-6700	

Add Partner... [ ] Add Property... [ ] Add Buyer... [ ] Add Seller... [ ]

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## 4.0 GENERAL TAB BASICS

### 4.1 ADDING/REMOVING A PARTNER

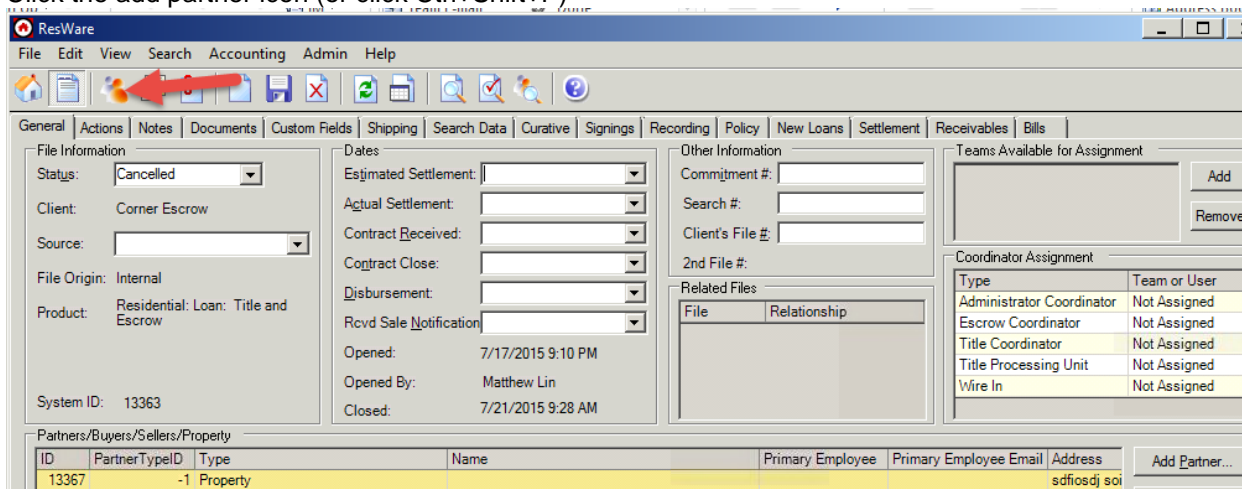
Specific rights have been granted when regards to partners. See below

Access rights	Power User Access	Non Power User access
Add a new partner, but not able to have the Partner approved into the database	Yes	Yes
Ability to fully approve the partner/Partner employee into ResWare database	Yes	No
Ability to edit partner/partner employees	Yes	No

There are a few exceptions: All users have the full ability to add the following partner types to the database without requiring database approval: **A TBD, One Time Payee, and Miscellaneous**

There are many ways to add a partner to a file. This manual will show a common way.

- Make sure you are in the file where you are adding a partner
- Click the add partner icon (or click Ctrl+Shift+P)



The screenshot shows the ResWare application window. The 'Add Partner' icon, which is a person with a plus sign, is highlighted with a red arrow in the toolbar. The application has a menu bar (File, Edit, View, Search, Accounting, Admin, Help) and a tabbed interface with various tabs like General, Actions, Notes, Documents, etc. The 'General' tab is active, showing fields for File Information, Dates, Other Information, and a list of Partners/Buyers/Sellers/Property. The 'Add Partner...' button is visible at the bottom right of the window.

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- c. Select an appropriate partner type

The screenshot shows the 'Search/Add Partner' window. The 'Partner Type' dropdown is open, displaying a list of options. The 'Company' section has fields for 'Company Name', 'Abbreviation', and 'Partner Type'. The 'Restriction' section has 'Restriction Type' (set to None) and 'State'. The 'Employee' section has 'First Name', 'Last Name', and 'Email Address' fields. There are checkboxes for 'Override Client Restrictions', 'Ignore Declining Partner', and 'Override Partner Restrictions'. A 'Search' button is visible.

- d. In the company name, enter the name. It is highly recommended to enter less information. For example, for Century 21, simply just type C to yield more results (as century may be written out as Century, C-21, C/21, etc)

- e. Click Search to yield results

The screenshot shows the 'Search/Add Partner' window with 'C' entered in the 'Company Name' field. The 'Search' button is highlighted with a red arrow. Below the search fields, a table of search results is displayed. The table has columns: System ID, Partner Company, ProperName, Address, Loca, Primary, Secondary, Name, Email, Phone, Cell Phone, and Title. The first row shows results for 'C & K Real Estate'.

System ID	Partner Company	ProperName	Address	Loca	Primary	Secondary	Name	Email	Phone	Cell Phone	Title
10353	C & K Real Estate	Glendale Off	1805 Parliament Rd	Enci			Montgomery, Nicole	nicolecarrico@cox.net			

- f. It is highly recommended, if you receive multiple matches, that you then match and sort results based upon address. You may also refine your search by locating an employee that works for that company

The screenshot shows the 'Search/Add Partner' window with 'C' entered in the 'Company Name' field. The 'Search' button is highlighted with a red arrow. Below the search fields, a table of search results is displayed. The table has columns: System ID, Partner Company, ProperName, Address, Loca, Primary, Secondary, Name, Email, Phone, Cell Phone, and Title. The results are sorted by address. The first row shows results for 'Century 21 Discovery'.

System ID	Partner Company	ProperName	Address	Loca	Primary	Secondary	Name	Email	Phone	Cell Phone	Title
10746	Century 21 Discovery	Glendale Off	100 W Valencia Mesa Dr.	Full							
6534	Century 21 M&M and Assoc	All Offices	1040 W Las Palmas Avenue, Sui	Patte							
6484	Century 21 Beachside	All Offices	10535 Foothill Blvd., #150	Ran							
6496	Century 21 En Realty	All Offices	1081 S. Grand Ave.	Dian							
10762	Century 21 Jervis	Glendale Off	10841 Paramount Blvd., #200	Dow							
16991	Century 21 All Moves	Orange Offic	11011 Balboa Blvd	Grar							

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- g. Once the exact match has been found, single click on it
- h. The partner employees will be shown on the right side. Select the appropriate primary and/or secondary employee contacts that will be associated with the file
- i. Click add to file (or double click on the matching company name)

**Note:** Here are some key points when searching the database:

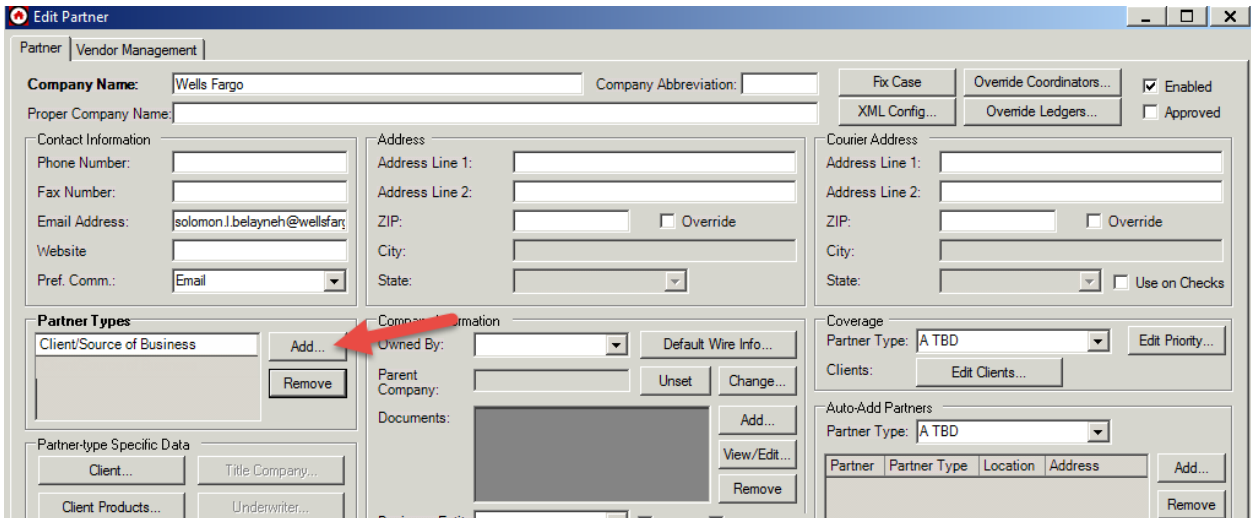
- a. When searching the database, is it possible that the partner is already in the system, but perhaps we didn't save them with the correct partner type? For example, perhaps Wells Fargo was saved as a Mortgage Broker, but not a New Lender. If that was the case, they would not be shown in the New Lender partner type dropdown, and you will have to communicate to the Power User to associate that partner as a New Lender.
- b. Make sure to always let a Power User know if a new partner type, or partner employee is added. The Power User must then approve the partner within the database.

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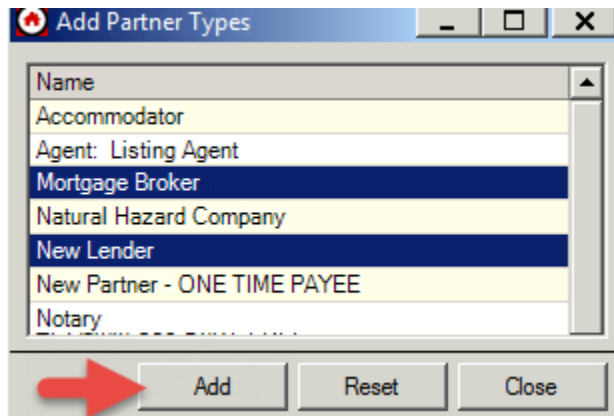
#### 4.1.1 WHAT A POWER USER MUST LOOK FOR

Here are the general criteria:

- a. **Power User must look for duplicates:** Usually a good sign that there might already be a duplicate in the system is for commonly used companies such as Bank of America or Re/Max. It's recommended to search for similar partner companies by address. For example, it's possible that C-21 at 123 Street may also be Century 21 at 123 ST.
- b. **Power Users must merge partner types whenever possible:** Be on the lookout for scenarios when team members add a separate partner many times (for each specific role) instead of just creating one partner, with multiple roles. For example, it's common to see Wells Fargo as the client and the new lender. Instead of creating 2 separate partners, Wells Fargo should be added as both a client and a new lender partner type.
  - i. Below is an example where this new Wells Fargo partner was added in as a client, but we need to add them also as a new lender. Click on Add

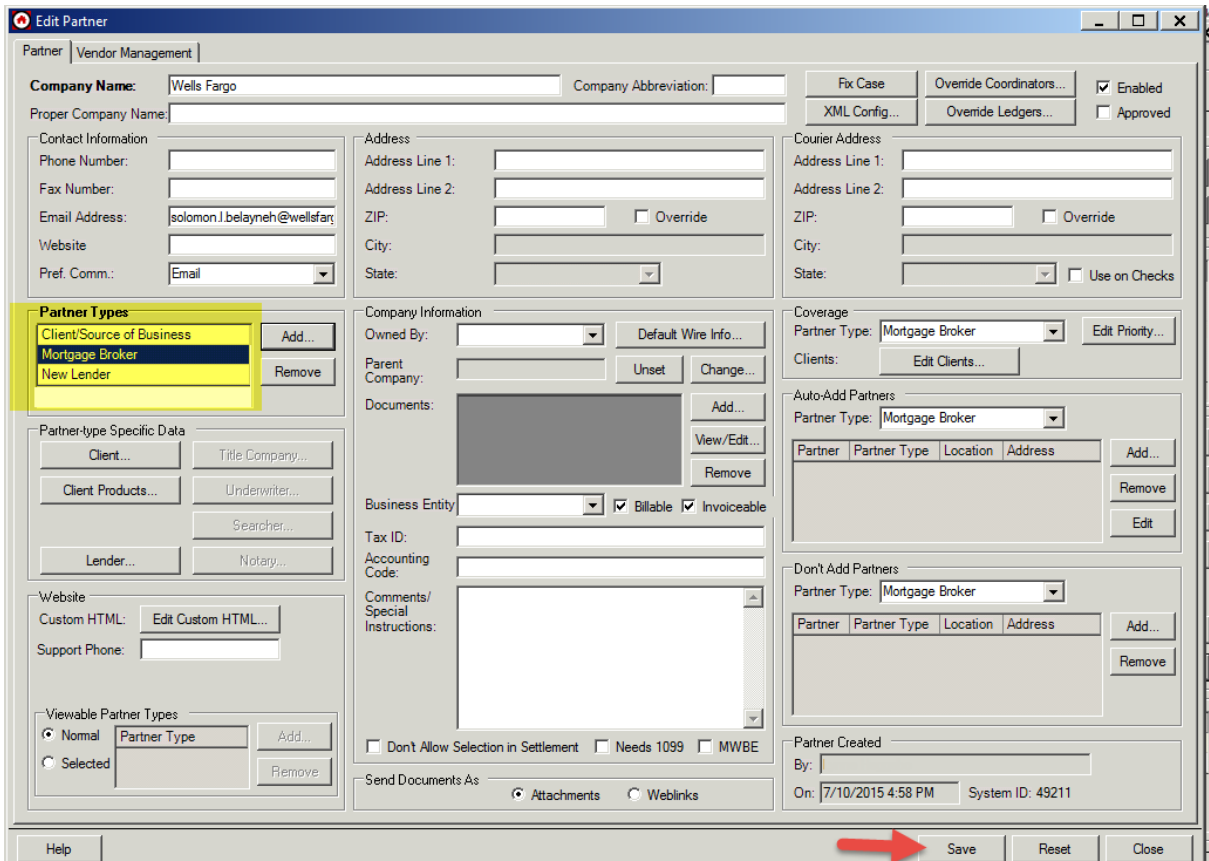


- ii. Add the appropriate partner type(s), then click add



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- iii. Once all appropriate partner type(s) have been added, click save

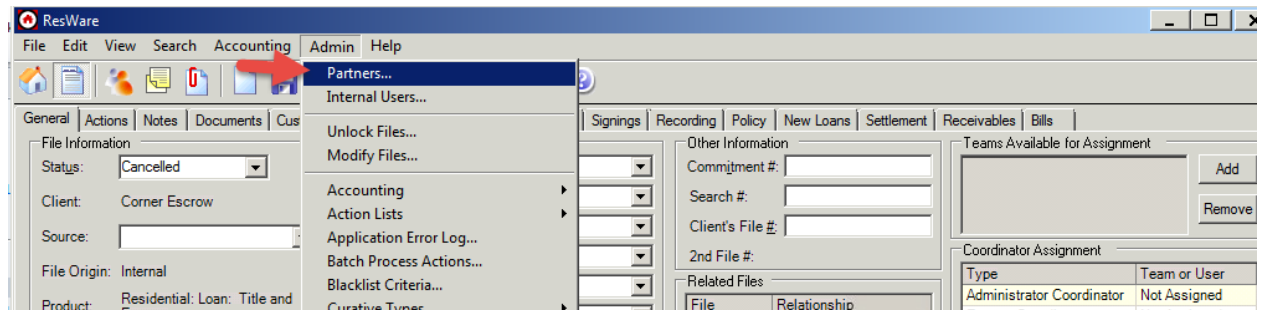


The 'Edit Partner' window is divided into several sections:

- Company Information:** Fields for Company Name (Wells Fargo), Company Abbreviation, and Proper Company Name.
- Contact Information:** Fields for Phone Number, Fax Number, Email Address (solomon.l.belayneh@wellsfargo.com), Website, and Preferred Communication method (Email).
- Address:** Fields for Address Line 1, Address Line 2, ZIP, City, and State. Includes an 'Override' checkbox.
- Courier Address:** Fields for Address Line 1, Address Line 2, ZIP, City, and State. Includes an 'Override' checkbox and a 'Use on Checks' checkbox.
- Partner Types:** A list box showing 'Client/Source of Business', 'Mortgage Broker' (highlighted), and 'New Lender'. Includes 'Add...' and 'Remove' buttons.
- Partner-type Specific Data:** Buttons for 'Client...', 'Title Company...', 'Client Products...', 'Underwriter...', 'Lender...', and 'Notary...'.
- Website:** Fields for Custom HTML (with an 'Edit Custom HTML...' button) and Support Phone.
- Viewable Partner Types:** Radio buttons for 'Normal' (selected) and 'Selected', with 'Partner Type' and 'Add...' buttons.
- Company Information (continued):** Fields for Owned By, Parent Company, Documents (with 'Add...', 'View/Edit...', and 'Remove' buttons), Business Entity, Tax ID, Accounting Code, and Comments/Special Instructions.
- Coverage:** Fields for Partner Type (Mortgage Broker) and Clients (with an 'Edit Clients...' button).
- Auto-Add Partners:** Fields for Partner Type (Mortgage Broker) and a table with columns Partner, Partner Type, Location, and Address. Includes 'Add...', 'Remove', and 'Edit' buttons.
- Don't Add Partners:** Similar fields and table to the Auto-Add section.
- Partner Created:** Fields for By (blank) and On (7/10/2015 4:58 PM), and System ID (49211).
- Buttons:** 'Help', 'Save' (indicated by a red arrow), 'Reset', and 'Close'.

- c. Power User should stress to the office to always notify when a new partner is added, when a new partner employee is added, or when there is a need to modify existing partner company or partner employee. Once a Power User is notified, the following are the steps required to review and/or add to the database:

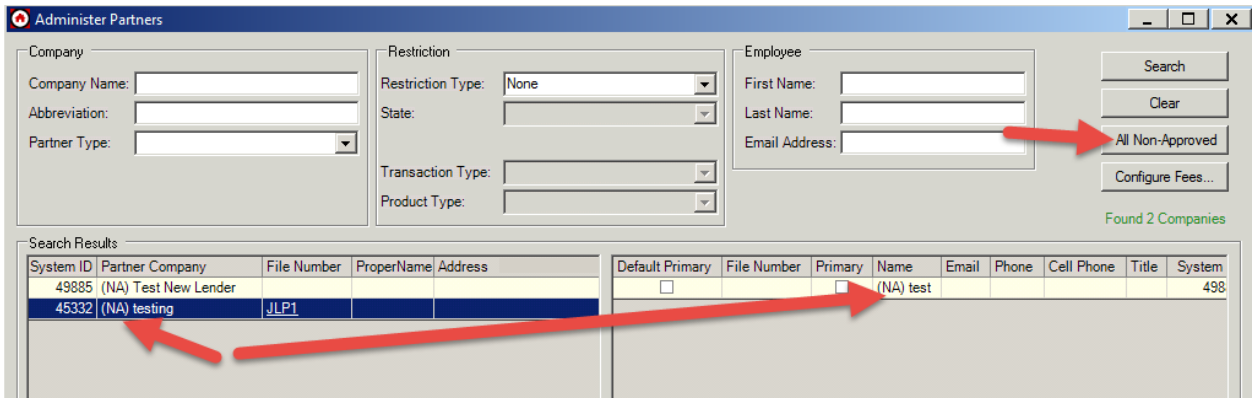
- i. Go to Admin/Partners



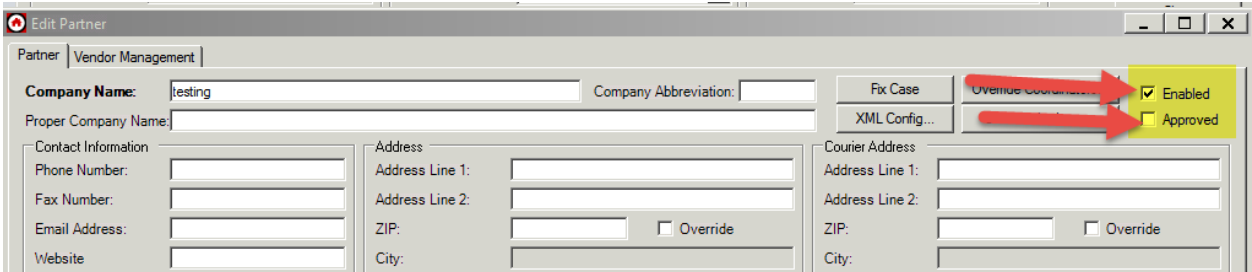
The screenshot shows the ResWare application with the 'Admin' menu open. The 'Partners...' option is highlighted. The main window displays the 'General' tab with fields for Status (Cancelled), Client (Corner Escrow), Source, File Origin (Internal), and Product (Residential: Loan: Title and Escrow). The 'Actions' tab is also visible, showing options like 'Unlock Files...', 'Modify Files...', 'Accounting', 'Action Lists', 'Application Error Log...', 'Batch Process Actions...', 'Blacklist Criteria...', and 'Curative Types'.

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- ii. Click on the following button: All Non- Approved
- iii. Note that there are 2 companies in this example that are not approved. Also note that for the highlighted Partner Company, there is also an employee that is not approved. You can tell that they are not approved because each partner company or employee is shown with an (NA) to the left of it. That would mean that a Power User must approve this.



- iv. Before approving, verify first if there is duplicate by searching the partner database. If there is a duplicate, this partner will not be approved, and the power user should disable this new partner, and for the particular file, add in the older partner type. This will prevent the system from having too many duplicates. Seek an admin or management if there is concern about some duplicates in the system.
- v. Double click on either the partner company or the employee (only if there is an NA next to one or the other)
- vi. If this is a new partner or partner employee, make sure both the Enabled and Approved check boxes are checked. If this is a duplicate and should be removed, make sure both the enabled and the approved check boxes are removed.



- vii. Click save and the partner company or partner employee has now been updated into the system.

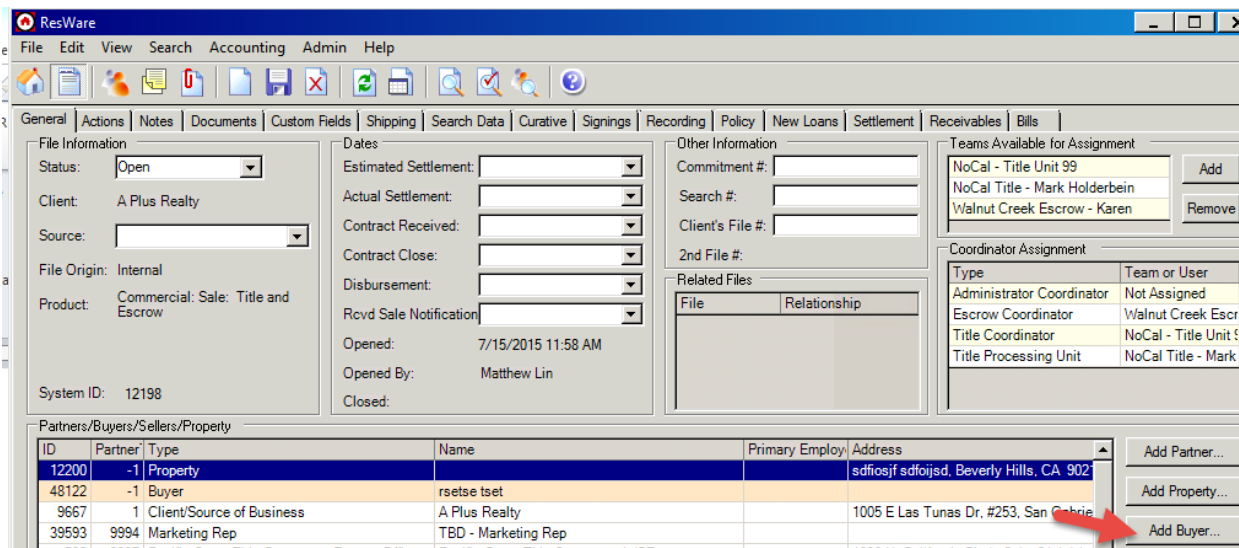
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## 4.2 BUYERS/SELLERS

### 4.2.1 ADDING/REMOVING BUYER/SELLER

Adding or removing a buyer can be accomplished via the General tab. All users have the same rights.

- a. Click on the Add buyer button to add a buyer

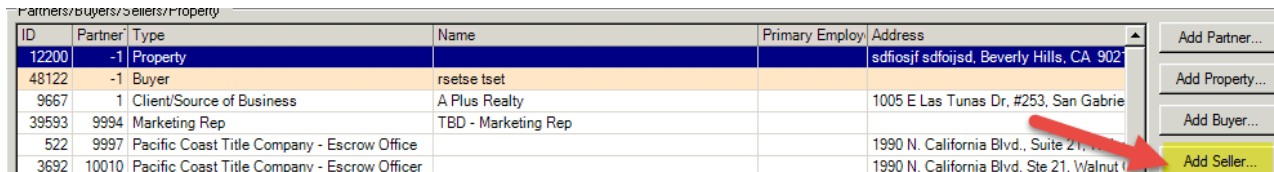


The screenshot shows the ResWare application window. The 'General' tab is selected. The 'Partners/Buyers/Sellers/Property' table is displayed at the bottom. The table has columns: ID, Partner, Type, Name, Primary Employer, and Address. The following data is visible in the table:

ID	Partner	Type	Name	Primary Employer	Address
12200	-1	Property			sdfojsf sdfojsd, Beverly Hills, CA 902
48122	-1	Buyer	rsetse tset		
9667	1	Client/Source of Business	A Plus Realty		1005 E Las Tunas Dr, #253, San Gabrie
39593	9994	Marketing Rep	TBD - Marketing Rep		
522	9997	Pacific Coast Title Company - Escrow Office			1990 N. California Blvd., Suite 21, Walnut
3692	10010	Pacific Coast Title Company - Escrow Officer			1990 N. California Blvd, Ste 21, Walnut

On the right side of the table, there are buttons: 'Add Partner...', 'Add Property...', 'Add Buyer...', and 'Add Seller...'. A red arrow points to the 'Add Buyer...' button.

- b. Click on add seller to add a seller to this file



The screenshot shows the same 'Partners/Buyers/Sellers/Property' table as above. A red arrow points to the 'Add Seller...' button on the right side of the table.

**Note:** Husband and wife would be considered one buyer (or one seller)

- c. To remove a buyer or seller, highlight on the appropriate buyer/seller, then click remove. ResWare will prompt to verify that the buyer/seller is to be removed. **Note:** You cannot delete a buyer or seller if you have receipted any money or disbursed any money to the buyer/seller. This will require specific Admin assistance.

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## MANUAL: TIPS AND TRICKS (T&T)

### GROUP: ESCROW



#### 4.2.2 SIGNATURE LINES

This can be utilized in both the Seller and Buyer screens. Simply double click either the buyer or the seller from the general tab to begin

a. Follow the diagram below:

##### Example for Trust

Here's what my Seller screen looks like for a Trust.

If you need a 2<sup>nd</sup> signature line. Use speed code 'sigline-' in the 'signature line' box.

Speed code

**sigline-**

then press space bar and the 2<sup>nd</sup> signature line will pop in.

Add your 2<sup>nd</sup> trustee name in place of the [signer's name]

Fred Flintstone  
Wilma Flintstone  
The Jeremy Family Trust dated October 23, 2004  
By: Debbie Jeremy, Trustee  
By: Patrick Jeremy, Trustee

Here's what it looks like in Escrow docs using the pullfield for ALL sellers on a file

##### Example for Corporation

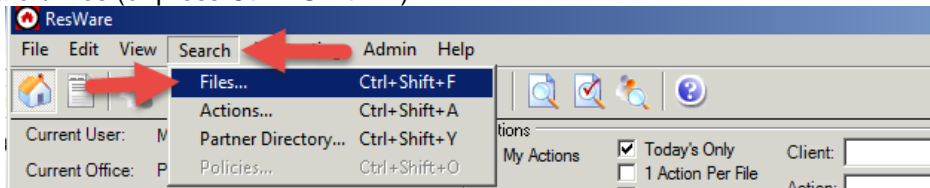
John S. Buyer  
R&B LLC  
By: Rob Barney, President  
By: Bill Barney, VP

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## 5.0 USING THE SEARCH FIELD

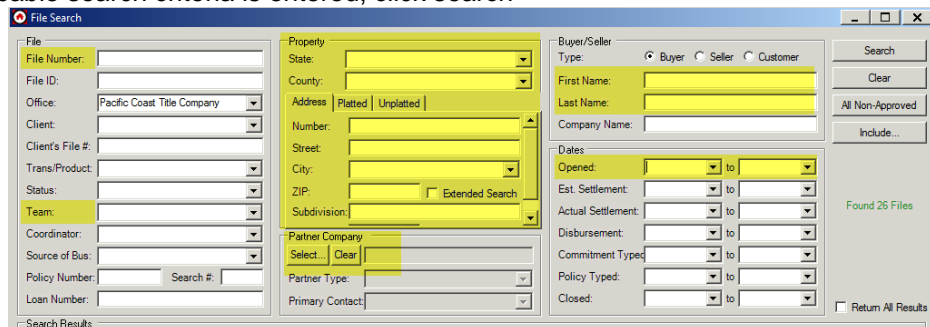
- a. Proceed to Search/Files (or press Ctrl + Shift + F)



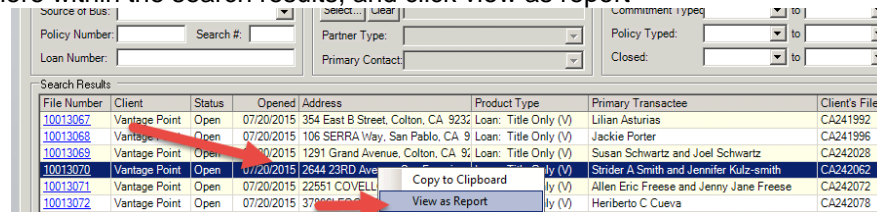
- b. There are many ways to search for files, and the ones highlighted sections that are most frequently used
- File Number (for ResWare)
  - Team (your Escrow Team can be selected)
  - Property (you can enter partial property information)
  - Buyer/Seller first and last name
  - Opened start and end dates

Note: use the % sign as a wildcard for searches. For example, if you type %Wells, the system will pull any matches that contains the word "Wells". Also note that the more information is added, the more refined search results will be yielded.

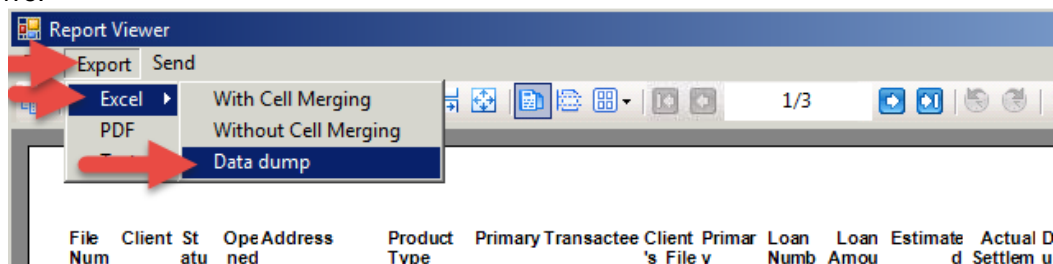
- c. Once the applicable search criteria is entered, click search



- d. Once the information is yielded, there are options to export the search criteria to an Excel report
- e. Right click anywhere within the search results, and click view as report



- f. Click the Export option
- g. Select Excel
- h. Select Data Dump. An excel form will now be available. Note that if you wanted to save the Excel, save it on your C: Drive.



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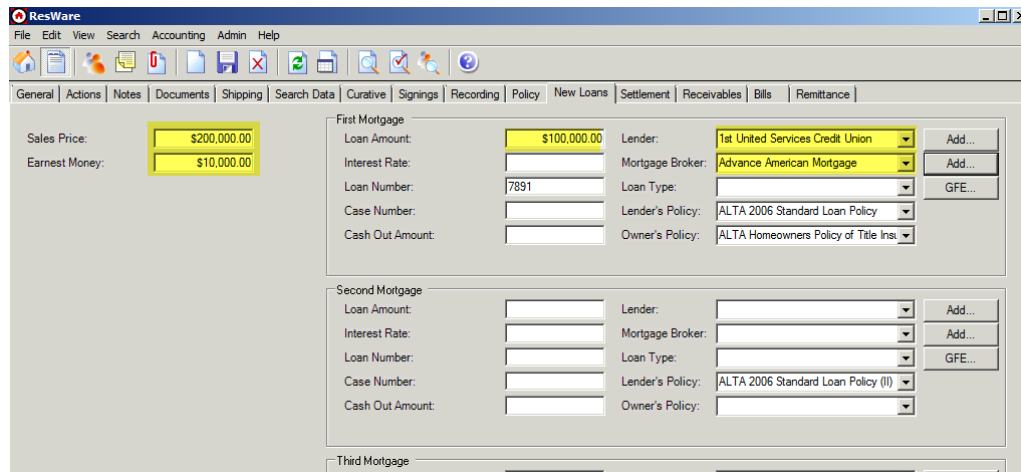
## 6.0 EARNEST MONEY DEPOSIT

This section covers specifics on how Earnest Money Deposit is entered in ResWare.

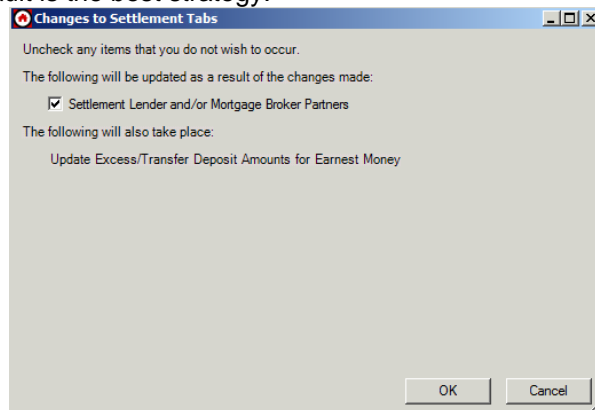
### 6.1 NEW LOANS TAB

- a. Proceed first to New Loans Tab
- b. Fill in the following fields, if necessary:
  - i. Sales Price (if applicable)
  - ii. Loan Amount (if applicable)
  - iii. Earnest Money
  - iv. Lender
  - v. Mortgage Broker

Note: check the FAQs section regarding specifics tied to lender and mortgage broker (if new lender/mortgage broker is missing from this field).



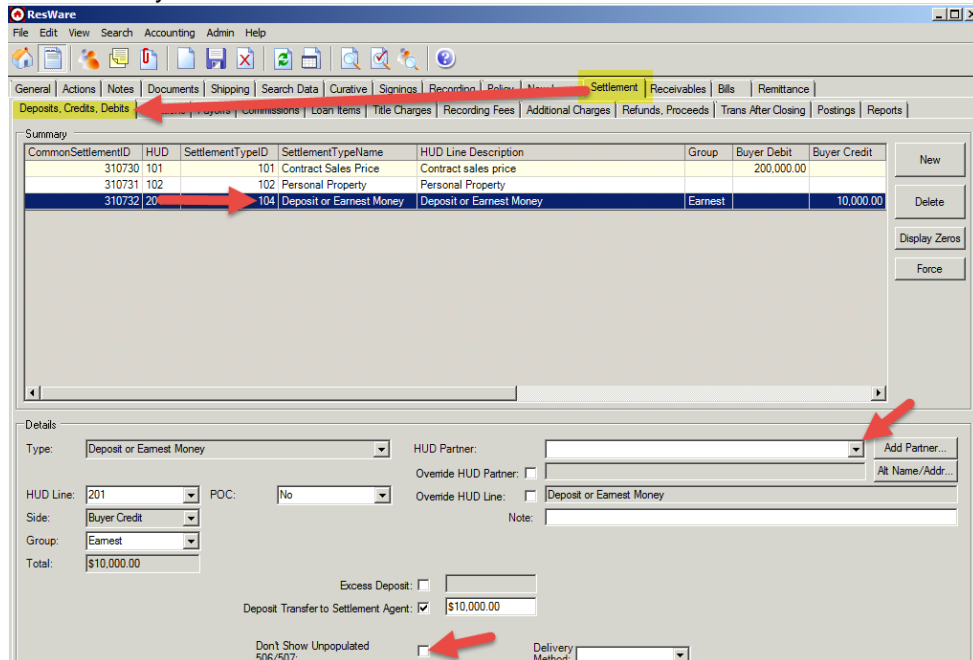
- c. Note: anytime you make a change to the Sales Price, Loan amount, and/or the earnest money, you will get a notification asking you how you want these changes to be applied to the Settlement tab. Most of the time, leaving the selections at default is the best strategy.



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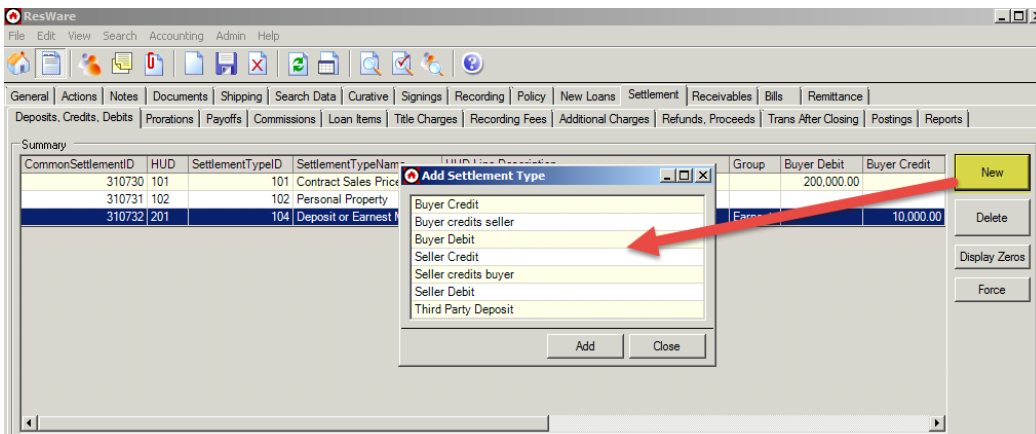
## 6.2 SETTLEMENT TAB

- Once all the sales price, loan amount, earnest money deposit, and/or lender/mortgage broker information has been entered into the New Loans tab screen, proceed to the Settlement tab/Deposits, Credits, Debits sub tab
- In the summary section of Deposits, Credits, Debits sub tab, click on the line associated with the Earnest money deposit
  - Hud Partner Dropdown menu: select the appropriate partner for the hud partner. This would usually consist of the Buyer
  - Check this box: Don't Show Unpopulated 506/507:** this checkbox is defaulted as unchecked, and Escrow units will have to manually check on this box. Note that if this box does not get checked, verbiage will appear on your HUD. This will require considerable effort to delete the verbiage. Thus, make sure that check box is always checked.



The screenshot shows the ResWare application window with the Settlement tab selected. The Summary section displays a table with columns: CommonSettlementID, HUD, SettlementTypeID, SettlementTypeName, HUD Line Description, Group, Buyer Debit, Buyer Credit, and New. The table contains three rows: 310730 101 Contract Sales Price, 310731 102 Personal Property, and 310732 201 104 Deposit or Earnest Money. The Details section below shows fields for Type, HUD Line, Side, Group, Total, HUD Partner, and various checkboxes and dropdowns. Red arrows highlight the 'Deposits, Credits, Debits' tab, the '104 Deposit or Earnest Money' line item, the 'HUD Partner' dropdown, and the 'Don't Show Unpopulated 506/507' checkbox.

- For any additional deposits, you must enter in Settlement first before accepting your deposits in the posting tab. Simply click on the new button to yield any additional deposits, then go to postings tab to claim those funds



The screenshot shows the ResWare application window with the Settlement tab selected. The Summary section displays a table with columns: CommonSettlementID, HUD, SettlementTypeID, SettlementTypeName, HUD Line Description, Group, Buyer Debit, Buyer Credit, and New. The table contains three rows: 310730 101 Contract Sales Price, 310731 102 Personal Property, and 310732 201 104 Deposit or Earnest Money. The 'Add Settlement Type' dialog box is open, showing a list of settlement types: Buyer Credit, Buyer Debit, Seller Credit, Seller Debit, and Third Party Deposit. Red arrows highlight the 'New' button and the 'Add Settlement Type' dialog box.

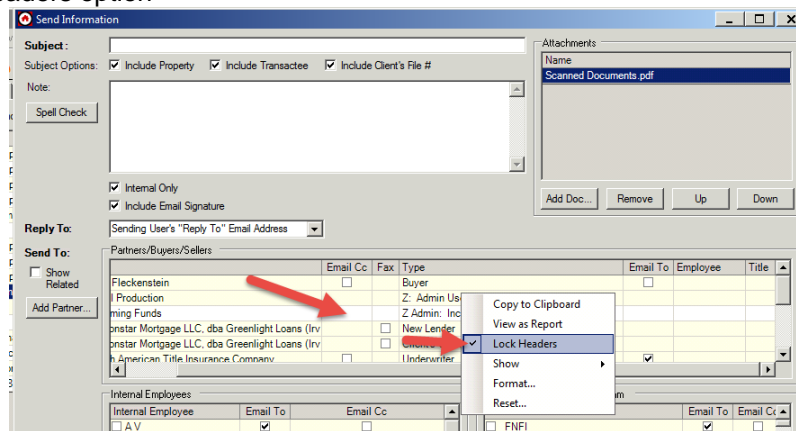
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## 7.0 EMAILS

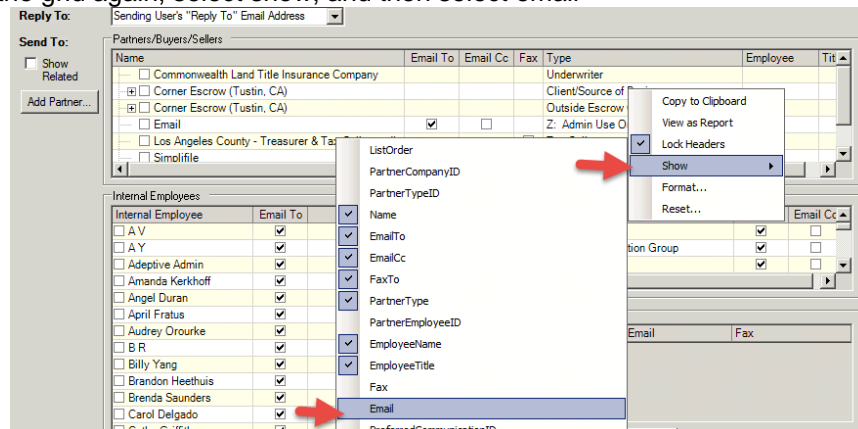
### 7.1 SETTING UP EMAIL HEADERS

It will be easier to start with formatting the Email screen in ResWare.

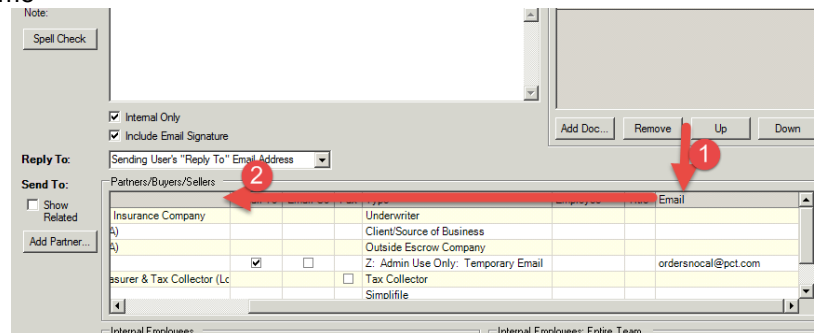
- In the Partners/Buyers/Sellers screen, right click anywhere within the grid
- Click on the Lock Headers option



- Right click within the grid again, select show, and then select email

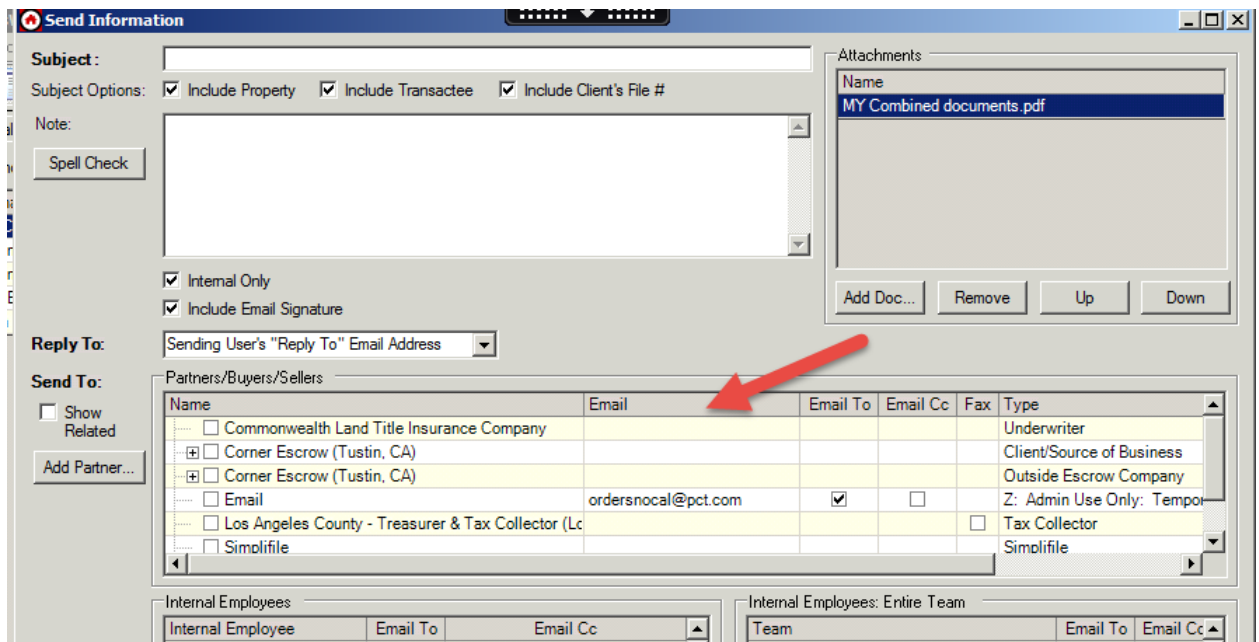


- Locate the column named "Email", left click and hold that gray column, and then drag it all the way to the left near the partner name

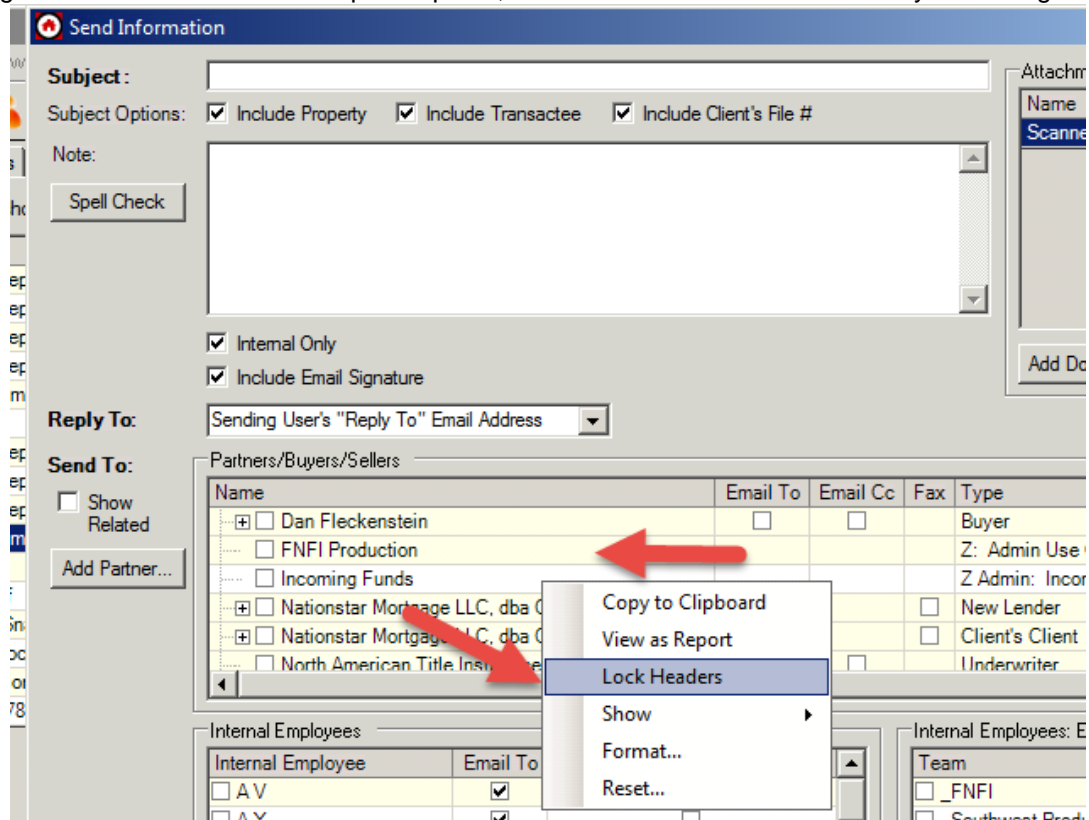


- The desired outcome will put the "Email" box next to the partner company name. This is critical because it will help identify which partners has an email address associated.

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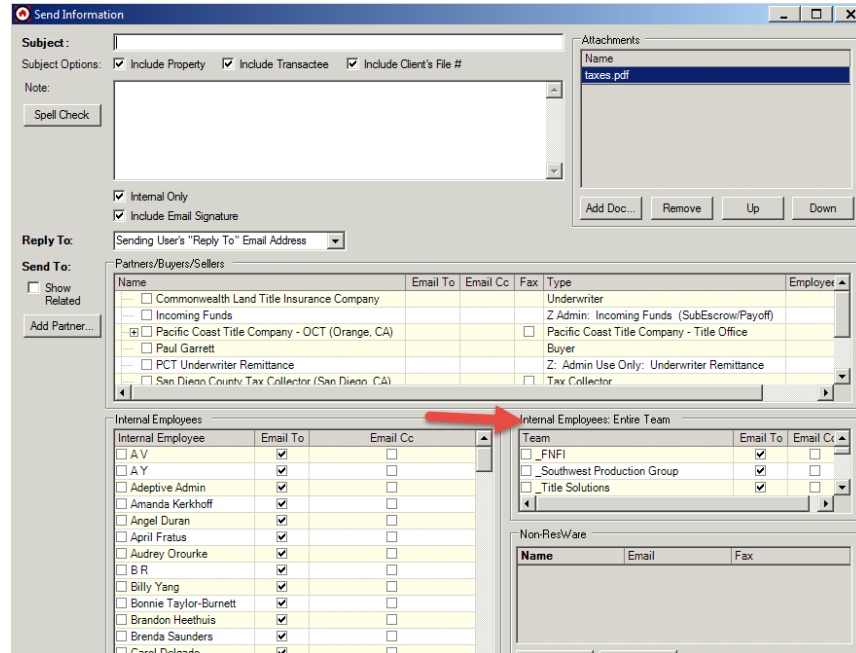
- f. Once the Email to has been moved, right click anywhere within the grid, and click lock headers. This will now lock the grid. Please note that this step is required, because failure to do so will reset your settings to default.



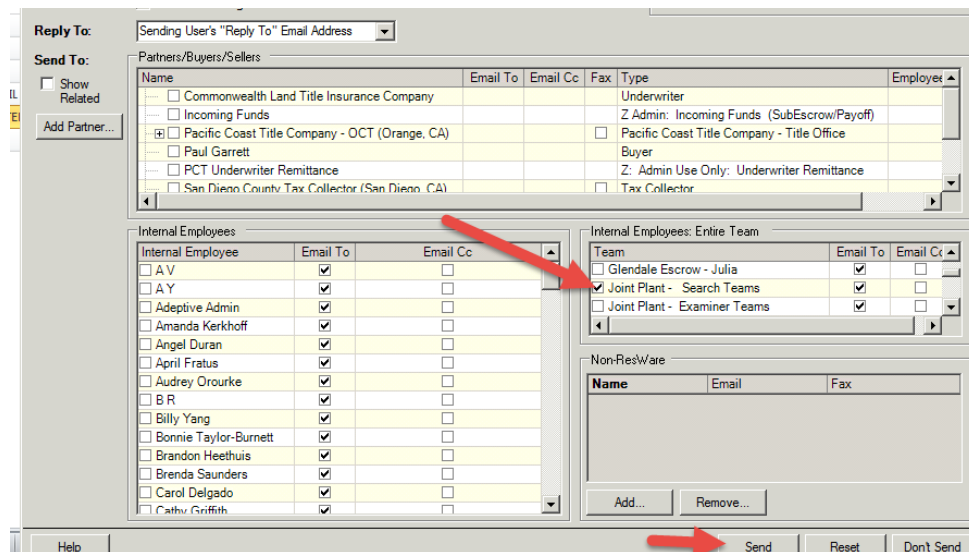
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## 7.2 EMAILING TO INTERNAL TEAMS

You have the option to be able to email teams within PCT. This is located in the email section: Internal Employees: Entire Team



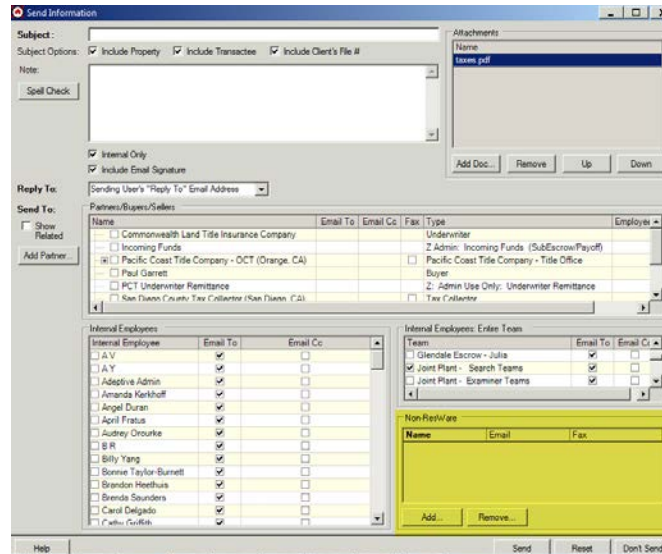
- a. Simply select any of the teams by click on the check box (on the left), and then click send
  - i. Note: The team accounts are specifically tied to the action item queues that each team member has. For the example below, anybody who has the action item queue of Joint plant-search teams, if an email is sent via the internal employees- entire team, they will all receive an email



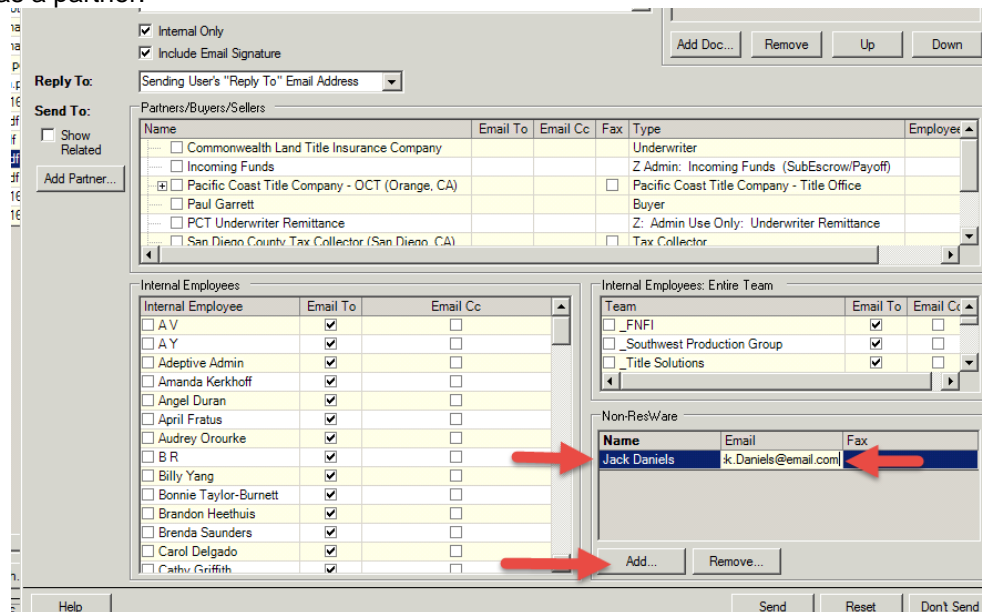
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### 7.3 EMAILING SOMEONE NOT IN RESWARE

There will be situations where you might need to send a quick email, and the partner/email address is not in the system. This can be accomplished through the "Non-ResWare" portion



- b. In the Non ResWare section, click add
- c. Enter the name of the recipient
- d. Enter the email address of the recipient
- e. Click send. The email will now be sent to the one-time email address.
  - i. Note: Adding a new email address using the Non-ResWare option **WILL NOT** add this to the database permanently. So if you have to send another email address to this recipient, you'll have to proceed with the same steps above. It is recommended that if you do plan to send to this recipient frequently, to add them in as a partner.



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## 8.0 TRANSACTIONS AFTER CLOSING

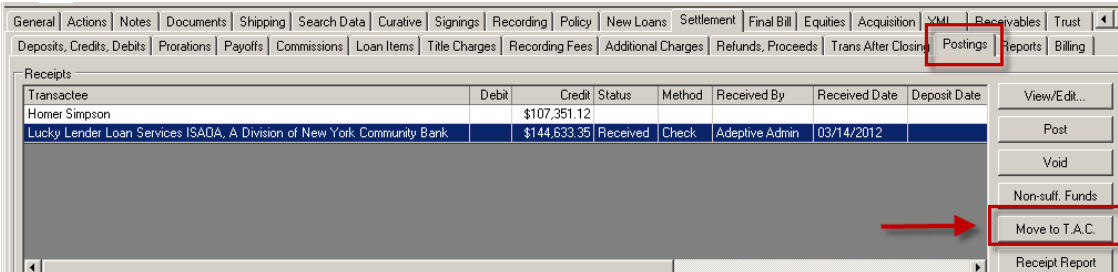
There are going to be moments when you may require that a disbursement or receipt may need to be adjusted, or perhaps even a fee is not to be shown on the HUD. The Transactions after Closing option can facilitate this. This can be found in the Settlement tab/Transactions after closing tab. Please note though that this section is very complicated and should not be done unless absolutely certain that a change is necessary. Transactions after closing should only be used as a last resort, and other options should always be considered first.

Adeptive has provided detailed instructions for how to move a receipt to TAC and How to Move a Disbursement to TAC. Click below icon(s) to open the PDF instructions.

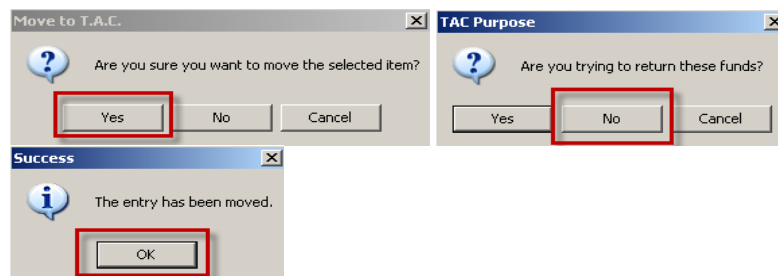
### Move a Posted Receipt to Transactions After Closing

**PURPOSE:** After a Receipt has been posted, the HUD lines used to create the item can no longer be modified. Users with the role “Settlement: Move Posting to Transactions After Close” enabled can unlock the affected HUD lines by moving the posted receipt to the Transactions After Closing Tab (T.A.C.). This will unlock the HUD lines for revisions.

- Unlock the affected HUD lines by moving the posted receipt to the Transactions After Closing Tab.
  - Select the item from the list and click the **Move to T.A.C.** button.



- Click the **Yes** button to confirm the move to T.A.C.
- Click the **No** button when you receive the pop up question “Are you trying to return these funds?” For this scenario we are not returning the funds; we are just unlocking the HUD lines for modification.
- Click the **Ok** button to complete the move.

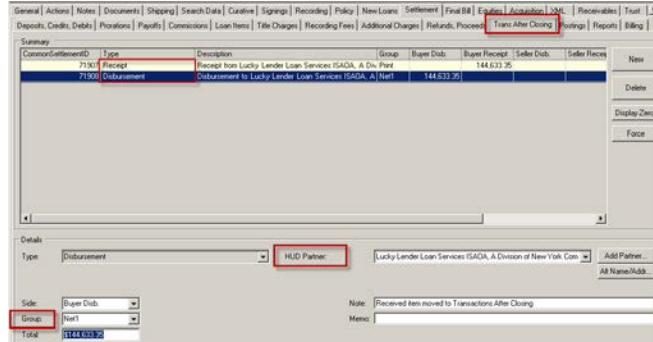


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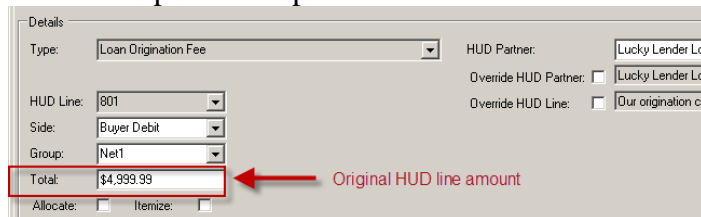
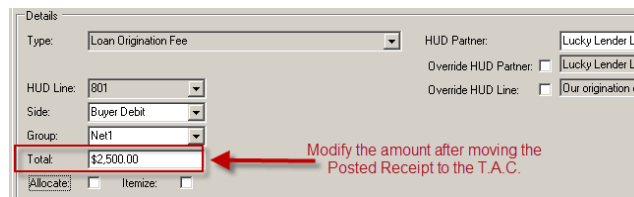
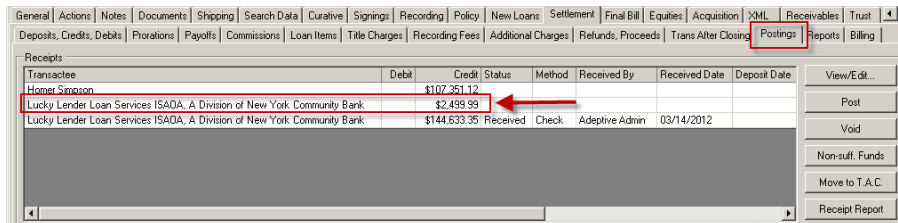


*Moving the Posted Receipt creates two lines on the Transactions After Closing Tab; a Receipt and a Disbursement.*

- Do not delete either line! The Transaction After Closing Tab must be balanced or the Postings Tab will be out of balance.
- On the Transactions After Closing Tab, confirm the Group and HUD Partner matches the Group and HUD Partner from the original HUD line.



- The HUD lines are now unlocked and open for modification.
  - As the HUD lines are modified, ResWare will re-calculate and create a new anticipated receipt or disbursement as needed.

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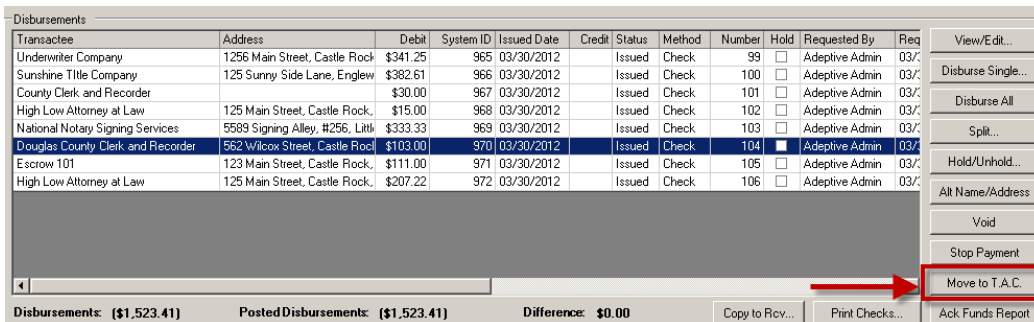


## Move a Disbursement to Transactions After Closing

**PURPOSE:** After an item has been disbursed, the HUD lines used to create the item can no longer be modified. Users with the role “Settlement: Move Posting to Transactions After Close” enabled can unlock the affected HUD lines by moving the disbursed item to the Transactions After Closing Tab (T.A.C.). This will unlock the HUD lines for revisions.

Unlock the affected HUD lines by moving the disbursed item to the Transactions After Closing Tab.

- Select the item from the list and click the Move to T.A.C. button.



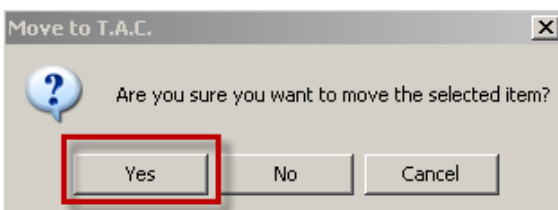
Transactee	Address	Debit	System ID	Issued Date	Credit	Status	Method	Number	Hold	Requested By	Req
Underwriter Company	1256 Main Street, Castle Rock	\$341.25	965	03/30/2012		Issued	Check	99	<input type="checkbox"/>	Adeptive Admin	03/30/2012
Sunshine Title Company	125 Sunny Side Lane, Englewood	\$382.61	966	03/30/2012		Issued	Check	100	<input type="checkbox"/>	Adeptive Admin	03/30/2012
County Clerk and Recorder		\$30.00	967	03/30/2012		Issued	Check	101	<input type="checkbox"/>	Adeptive Admin	03/30/2012
High Low Attorney at Law	125 Main Street, Castle Rock	\$15.00	968	03/30/2012		Issued	Check	102	<input type="checkbox"/>	Adeptive Admin	03/30/2012
National Notary Signing Services	5589 Signing Alley, #256, Littleton	\$333.33	969	03/30/2012		Issued	Check	103	<input type="checkbox"/>	Adeptive Admin	03/30/2012
Douglas County Clerk and Recorder	562 Wilcox Street, Castle Rock	\$103.00	970	03/30/2012		Issued	Check	104	<input checked="" type="checkbox"/>	Adeptive Admin	03/30/2012
Escrow 101	123 Main Street, Castle Rock	\$111.00	971	03/30/2012		Issued	Check	105	<input type="checkbox"/>	Adeptive Admin	03/30/2012
High Low Attorney at Law	125 Main Street, Castle Rock	\$207.22	972	03/30/2012		Issued	Check	106	<input type="checkbox"/>	Adeptive Admin	03/30/2012

Disbursements: (\$1,523.41) Posted Disbursements: (\$1,523.41) Difference: \$0.00

Copy to Rcv... Print Checks... Ack Funds Report

Move to T.A.C.

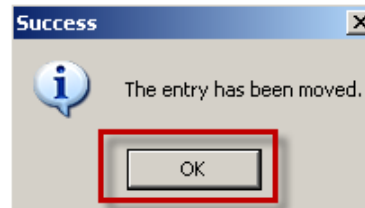
- Click the Yes button to confirm the move to T.A.C.
- Click the Ok button to complete the move.



Move to T.A.C.

Are you sure you want to move the selected item?

Yes No Cancel



Success

The entry has been moved.

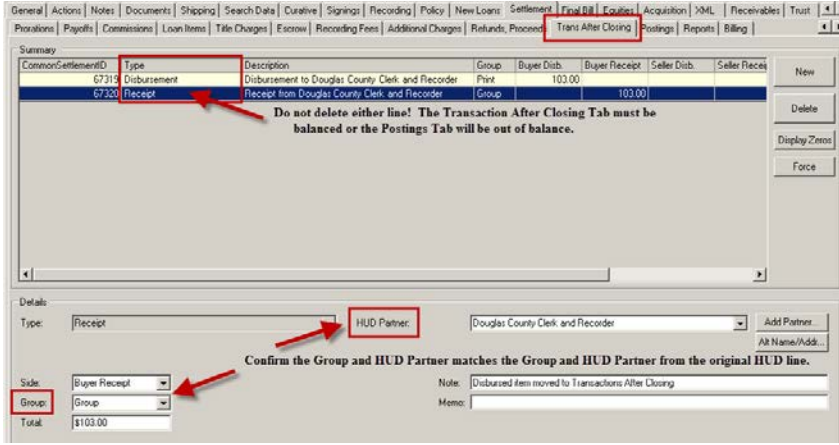
OK

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*Moving the Disbursed Item creates two lines on the Transactions After Closing Tab; a Receipt and a Disbursement.*

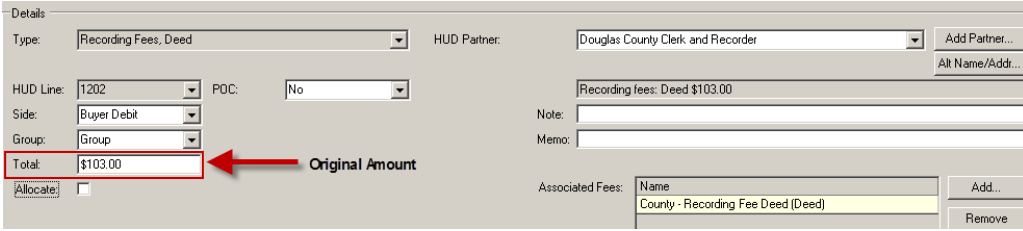
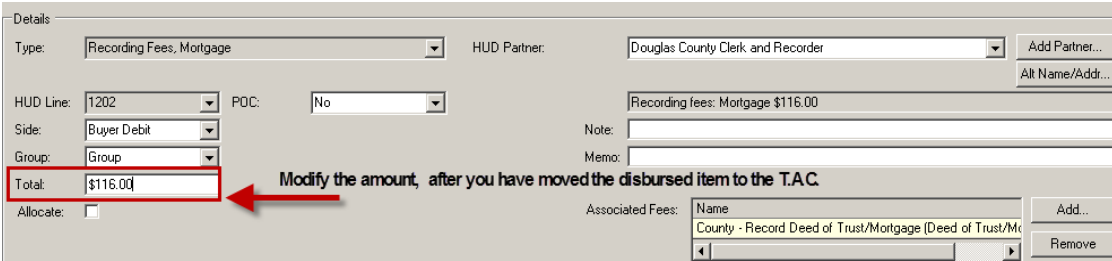
- *Do not delete either line! The Transaction After Closing Tab must be balanced or the Postings Tab will be out of balance.*

On the Transactions After Closing Tab, confirm the Group and HUD Partner matches the Group and HUD Partner from the original HUD line.



The HUD lines are now unlocked and open for modification.

- o As the HUD lines are modified, ResWare will re-calculate and create a new anticipated receipt or disbursement as needed.

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## 9.0 CONTACTS

Please refer to the below for contacts/questions. Double click on the picture below:

### ResWare Questions and Escalation Sheet

Admin/Power Users/Trainers	
Rita Nordby Rita@pct.com	ResWare Administrator: Matthew Lin Mlin@pct.com
ResWare Documents Specialist: Christy Jeremy Cjeremy@pct.com	Escrow Trainer: Pat Compaglia Pcompaglia@pct.com
Escrow Trainer: Carol Delgado CDelgado@pct.com	Escrow Trainer: Teri Olberg TOlberg@pct.com
Power User (Walnut Creek): Roslyn Singh rsingh@pct.com	Power User (Commercial): Denise Populis dpopulis@pct.com
Power User (Danville): Melissa Oiwa moiwa@pct.com	Power User: Title: Mark Holderbein mholderbein@pct.com

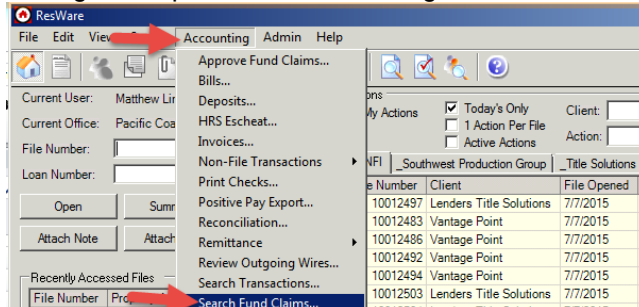
Contacts for specific Questions/Escalation	
Issues	Contact
General tab	Matt
Actions tab	Matt
Notes tab	Matt
Documents tab	Christy/Matt
Custom fields tab	Christy/Matt
Shipping tab	Matt
Search Data tab	Christy/Matt
Curative tab	Matt
Recording tab	Matt
Policy tab	Christy/Matt
New Loans tab	Matt
Settlement tab	Escrow Trainers: Pat/Teri/Carol
Wires In and wires out concerns	Initial setup and training: Matt Daily operations: Accounting (OAC)
ResWare issues with scanners	Initial setup and training: Matt Daily operations: Jose Hill
Check printing issues	Initial setup and training: Matt Daily operations: Jose Hill
Issues with Citrix	Jose/Matt
New ResWare Users Request/Termination requests	Jose/Matt
ResWare permissions issues	Matt
ResWare login issues	Jose/Matt

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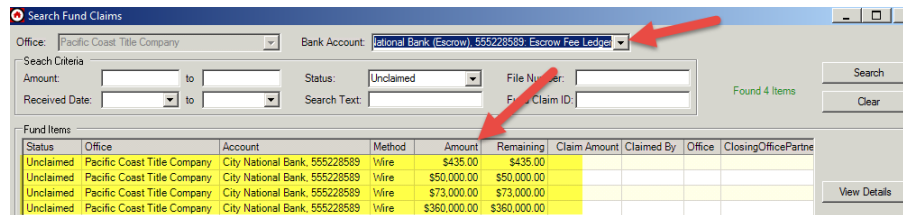
## 10.0 WIRES

### 10.1 CHECKING THE WIRE BOARD IN RESWARE

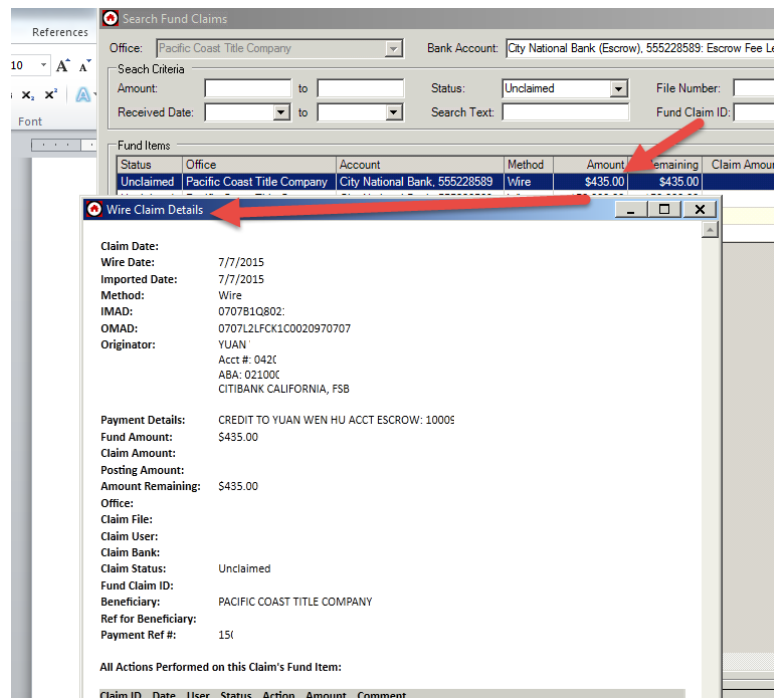
- a. To check in ResWare for incoming wires, proceed to Accounting/Search Fund Claims



- b. Bank Account dropdown: Select 555228589: Escrow  
c. Once selected, the system will show any available unclaimed wires



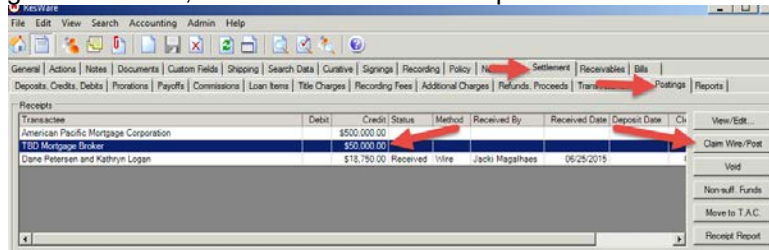
- d. Double click on a specific wire to reveal more detailed information.



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## 10.2 HOW TO CLAIM A WIRE

- a. An anticipated receipt must first be created for the amount to be claimed. For this example, the anticipated wire is \$50,000. Highlight the amount, and then click claim wire/post. Note:



- b. Select Wire. Note: If you were to claim a check, simply leave the method dropdown to check, and then click save. For additional wire claim information, proceed to the next step

- c. A menu will populate prompting if the wire should be claimed from the fund claim system (aka Citi National Bank wire board). Click yes to claim from the fund claim system

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- d. ResWare will populate the possible matches to the anticipated wire, within the range of a couple thousand dollars. For example, the anticipated wire was \$50,000 and ResWare will look for wires that are between \$48,500 to \$51,500.
- e. If there are multiple matches, make sure to select the correct one. In this example, there was only one match. Left click on the wire amount match
- f. Click Claim wire. A claim item menu will populate
  - i. Optional: When the claim item menu populates, select your appropriate closing office, and add comments, if available.
- g. Click save. The wire is now claimed, and can be seen from the postings tab.

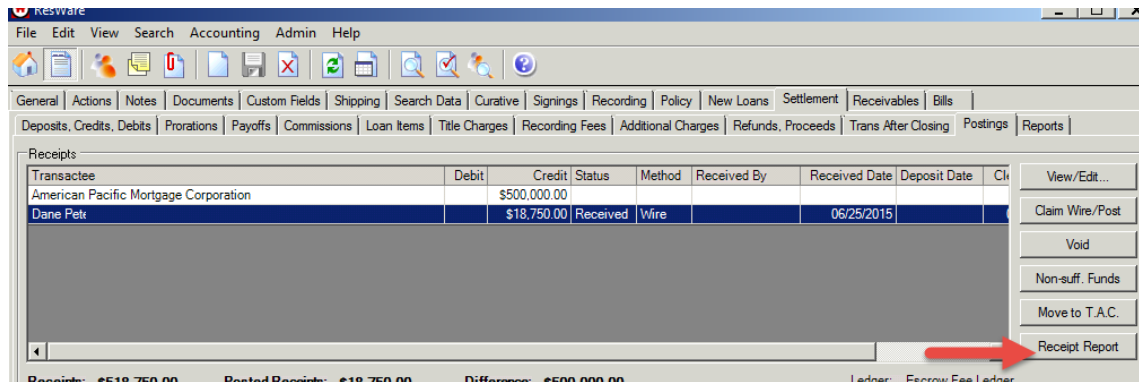
The screenshot shows the 'Fund Claim Search' window. At the top, search criteria are set: Office (Pacific Coast Title Company), Bank Account (City National Bank (Escrow), 555228589), Posting Amount (\$50,000.00), Amount (\$48,500.00 to \$51,500.00), Status (Unclaimed), and File Number. A 'Found 1 Item' message is visible. Below the search criteria is a table of 'Fund Items' with columns: Status, Office, Account, Method, File Number, Comments, Wire Date, Imported, Amount, and Remaining. One item is listed: Unclaimed, Pacific Coast Title Company, City National Bank, 555228589, Wire, 7/7/2015, 07/07/2015 01:26 PM, \$50,000.00, \$50,000.00. To the right of the table are buttons: 'Claim Wire', 'View Details', and 'Add Fund Item'. A 'Claim Item' dialog box is open in the center, displaying details for the selected wire: Wire Amount (\$50,000.00), Remaining Amount (\$50,000.00), Posting Amount (\$50,000.00), Received Date (7/7/2015), Federal Ref # (07071Q34G1C000193), Beneficiary (PACIFIC COAST TITLE COMPANY), Sending Bank (NIEL R PETERSEN, Acct #: 1112441), Broker/Lender Info, Borrower Info (ESCROW NO 10011495-CVE-NC), Payment Ref # (150707006476), Additional Info, Closing Office (dropdown menu), and Comment (text area). At the bottom of the dialog box are buttons: 'Help', 'Save' (highlighted with a red arrow), 'Reset', and 'Close'. There is also a 'Partial Claim' checkbox and a 'Partial Claim Amount' field.

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## 10.3 HOW TO CREATE A RECEIPT REPORT

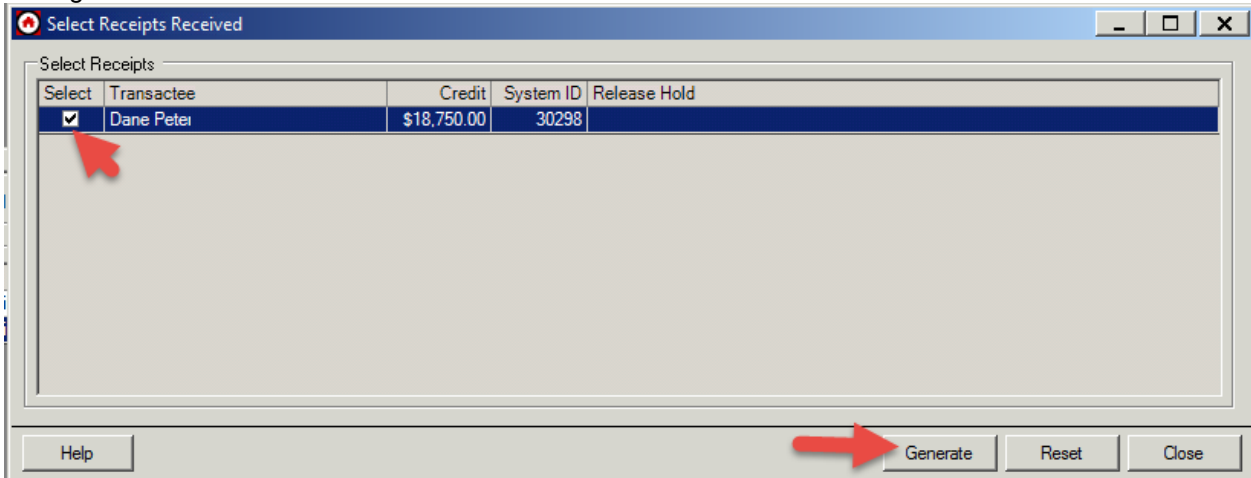
This step can only be completed when the wire or check for that specific amount has been claimed/posted to the receipts screen.

- a. In Settlement/Postings tab/Receipts section, click on the Receipt Report



Transactee	Debit	Credit	Status	Method	Received By	Received Date	Deposit Date	Cl
American Pacific Mortgage Corporation		\$500,000.00						
Dane Peter		\$18,750.00	Received	Wire		06/25/2015		

- b. Select the receipt(s) by clicking on the check box associated with the receipt total.  
c. Click generate



Select	Transactee	Credit	System ID	Release Hold
<input checked="" type="checkbox"/>	Dane Peter	\$18,750.00	30298	

- d. A receipt report can now be generate for printing and/or emailing

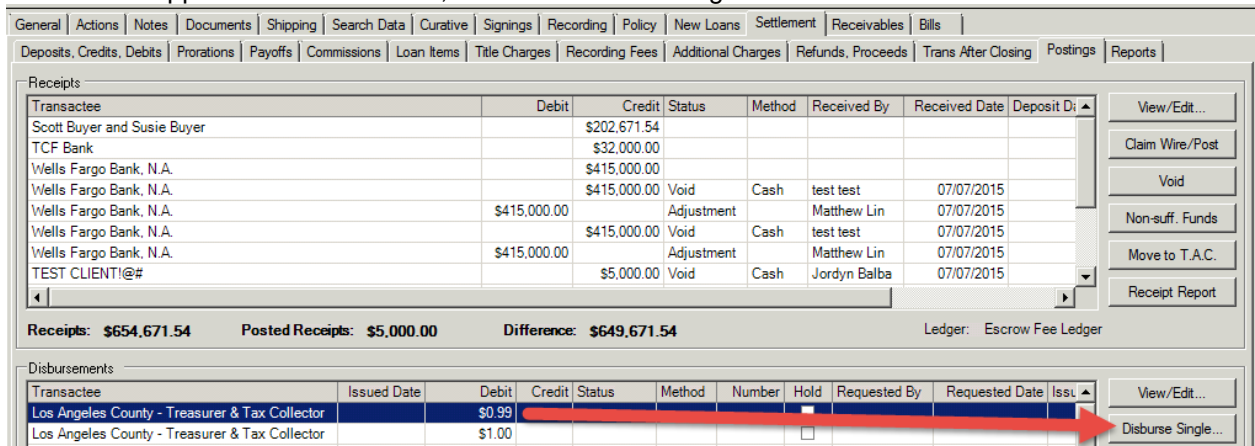
FUNDS RECEIPT		Pacific Coast Title Company	
ACKNOWLEDGMENT OF FUNDS RECEIVED			
File Number: 1001		Property Address: 8 Leap Way, Orinda, CA 94563	
Payor	Received	Amount	
Hughes & Sons, LLC	6/23/2015	\$200,000.00	
	Received:	\$200,000.00	
The receipt of the above listed items in connection with this closing is acknowledged.			
Received By	Date		

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## 11.0 PRINTING CHECKS

Before printing checks, make sure the following items are considered:

- i. Have you receipted in money? You'll need to receipt in money before you can cut any checks
  - ii. Is your file in balance? The anticipated receipts needs to equal the anticipated disbursements
  - iii. Do you have permission to cut checks? Not every user has access to cut checks
  - iv. Make sure the check printer is on
  - v. Make sure there are adequate blank checks in the printer
  - vi. Make sure the toner is still in good condition. If there are issues with the toner or printer, contact IT.
- a. Click on the applicable disbursement, and click disburse single

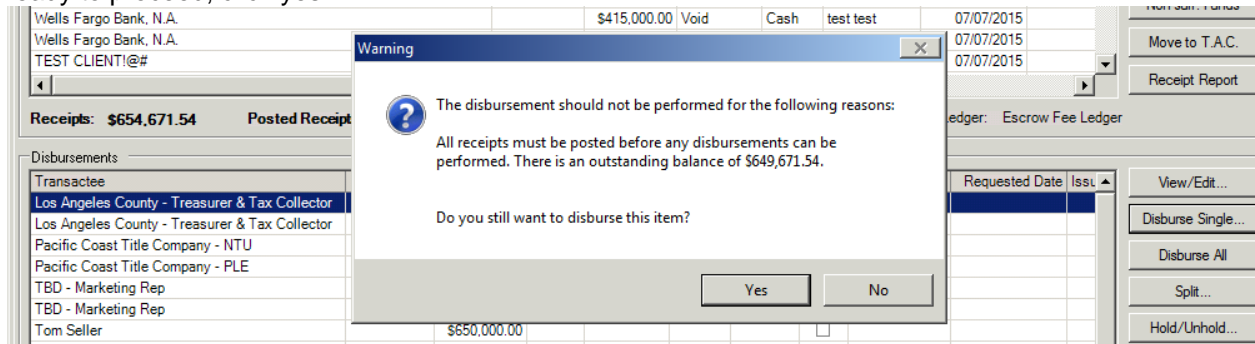


The screenshot shows the software interface with the following data:

Transactee	Debit	Credit	Status	Method	Received By	Received Date	Deposit Di
Scott Buyer and Susie Buyer		\$202,671.54					
TCF Bank		\$32,000.00					
Wells Fargo Bank, N.A.		\$415,000.00					
Wells Fargo Bank, N.A.		\$415,000.00	Void	Cash	test test	07/07/2015	
Wells Fargo Bank, N.A.	\$415,000.00		Adjustment		Matthew Lin	07/07/2015	
Wells Fargo Bank, N.A.		\$415,000.00	Void	Cash	test test	07/07/2015	
Wells Fargo Bank, N.A.	\$415,000.00		Adjustment		Matthew Lin	07/07/2015	
TEST CLIENT!@#		\$5,000.00	Void	Cash	Jordyn Balba	07/07/2015	

Receipts: \$654,671.54    Posted Receipts: \$5,000.00    Difference: \$649,671.54    Ledger: Escrow Fee Ledger

- b. You may receive some warnings populate. Make sure to address these issues before proceeding. If/when ready to proceed, click yes



The warning dialog box contains the following text:

**Warning**

The disbursement should not be performed for the following reasons:

All receipts must be posted before any disbursements can be performed. There is an outstanding balance of \$649,671.54.

Do you still want to disburse this item?

Yes No

- c. Method dropdown: Select Check
- d. Click save



The 'Disburse Single' dialog box contains the following information:

Requested: 7/9/2015

Method: Check

Supporting Document:

Buttons: Help, Save, Reset, Close

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- e. The disbursement will now be set to "Pending" status and has been prepped for printing. To enable printing, highlight the check(s) in pending amount, and click Print checks

- f. A print checks menu will populate. Highlight the appropriate check(s) and click print selected

- g. Make sure the selected check printer is the correct ResWare check printer, and once the correct check printer has been correctly identified and/or selected, click print

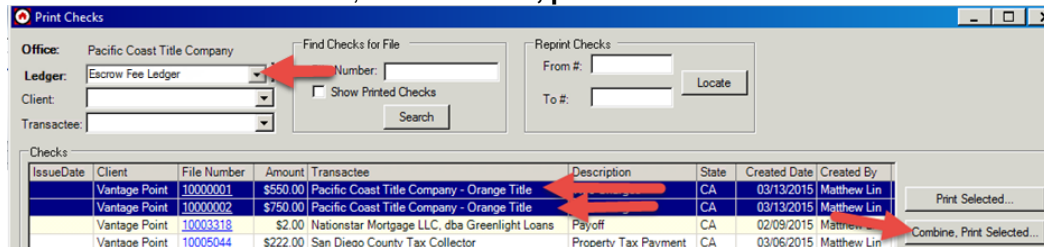
- h. Once the check has been printed, the check will show as "Issued" in the disbursement screen

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## 11.1 PRINTING MULTIPLE PRINTERS (SAME PARTNER)

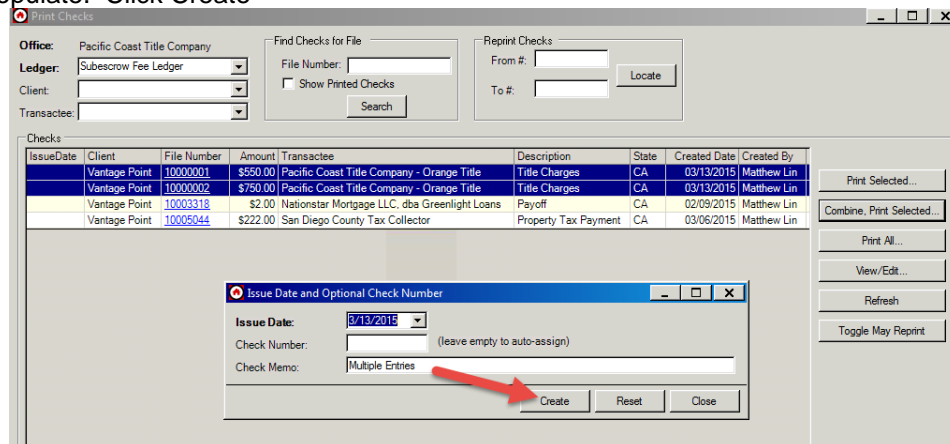
ResWare has the capability of combining multiple checks into one check, provided that the checks are all associated with the same partner

- Make sure the Ledger is set to Escrow Fee Ledger
- Highlight all fees with the same party (hold the ctrl button on the keyboard and click on each fee)
- Once all the checks have been selected, click **combine, print selected** button

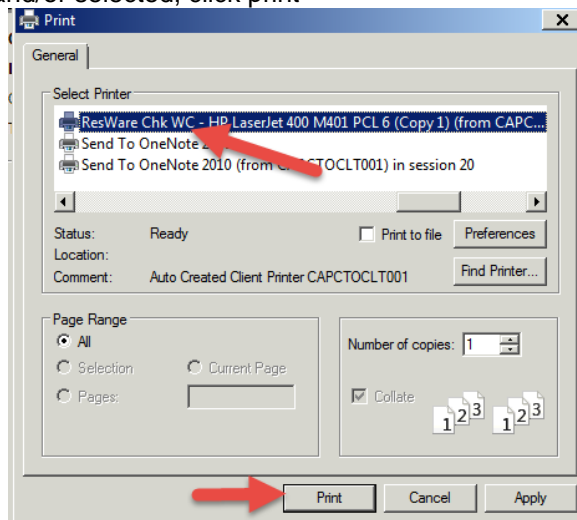


IssueDate	Client	File Number	Amount	Transactee	Description	State	Created Date	Created By
	Vantage Point	10000001	\$550.00	Pacific Coast Title Company - Orange Title	Title Charges	CA	03/13/2015	Matthew Lin
	Vantage Point	10000002	\$750.00	Pacific Coast Title Company - Orange Title	Title Charges	CA	03/13/2015	Matthew Lin
	Vantage Point	10003318	\$2.00	Nationstar Mortgage LLC, dba Greenlight Loans	Payoff	CA	02/09/2015	Matthew Lin
	Vantage Point	10005044	\$222.00	San Diego County Tax Collector	Property Tax Payment	CA	03/06/2015	Matthew Lin

- A menu will populate. Click Create



- Make sure the selected check printer is the correct ResWare check printer, and once the correct check printer has been correctly identified and/or selected, click print



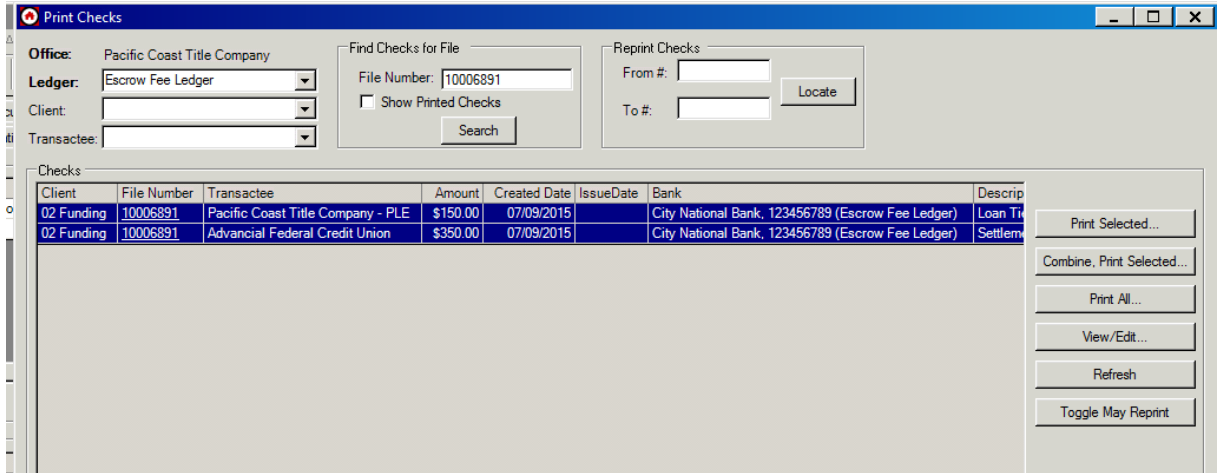
- Once the check has been printed, the check will show as "Issued" in the disbursement screen

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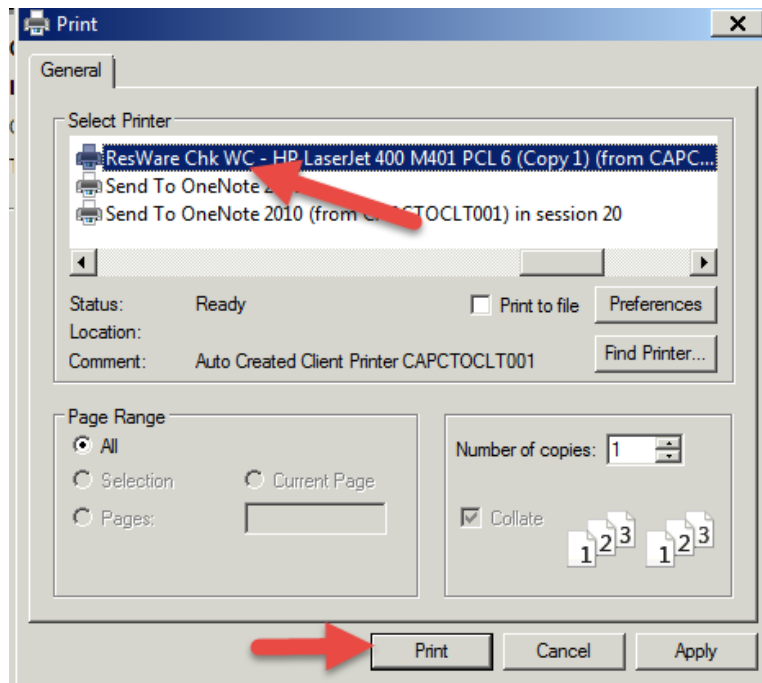
## 11.2 PRINTING MULTIPLE CHECKS (DIFFERENT PARTNERS)

ResWare has the capability of printing multiple checks (different partners) at the same time.

- a. In the check screen, you have 2 options:
  - i. Option 1: Hold the CTRL button, and click on each check that you want to be printed out, and then click print selected
  - ii. Option 2: click print all. ResWare will select ALL the checks that are pending to be printed



- b. Make sure the selected check printer is the correct ResWare check printer, and once the correct check printer has been correctly identified and/or selected, click print



- c. Once the check has been printed, the check will show as "Issued" in the disbursement screen

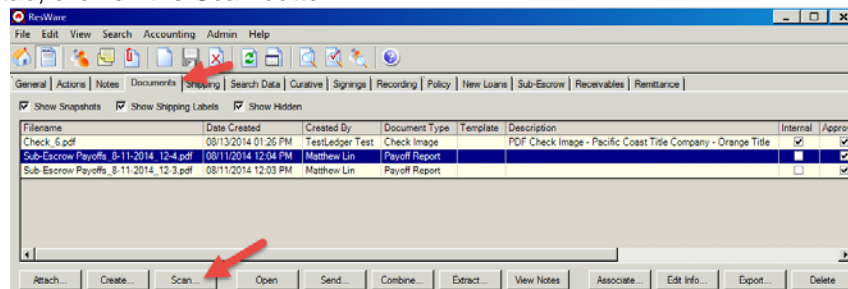
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## 12.0 DOCUMENTS TAB BASICS

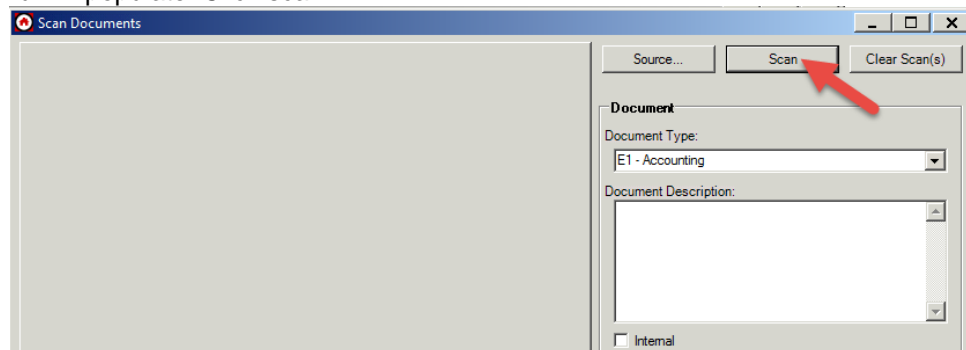
### 12.1 SCANNING

Note: depending on the scanner that you are using, some of the program features will be different. This will be mentioned in the manual

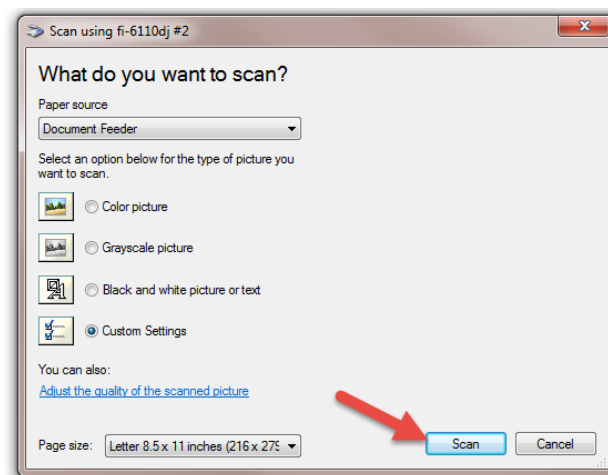
- Access specific file in ResWare, and click on Documents tab
- In the Documents tab, click on the Scan button



- The Scan menu will populate. Click scan



- An additional scan menu will populate. Please note that this screen may appear differently than your screen. Click scan.



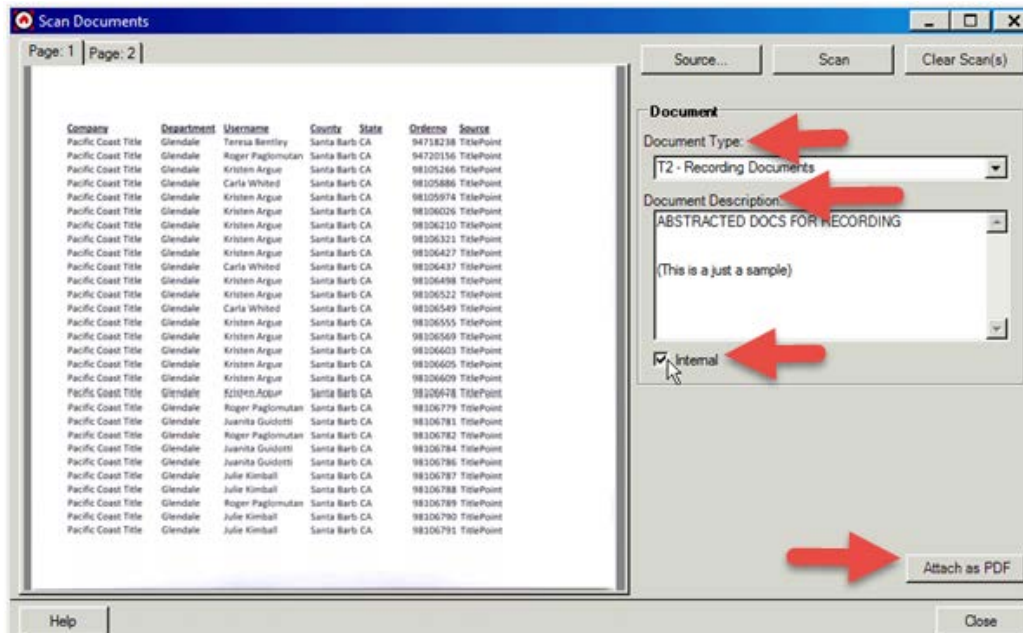
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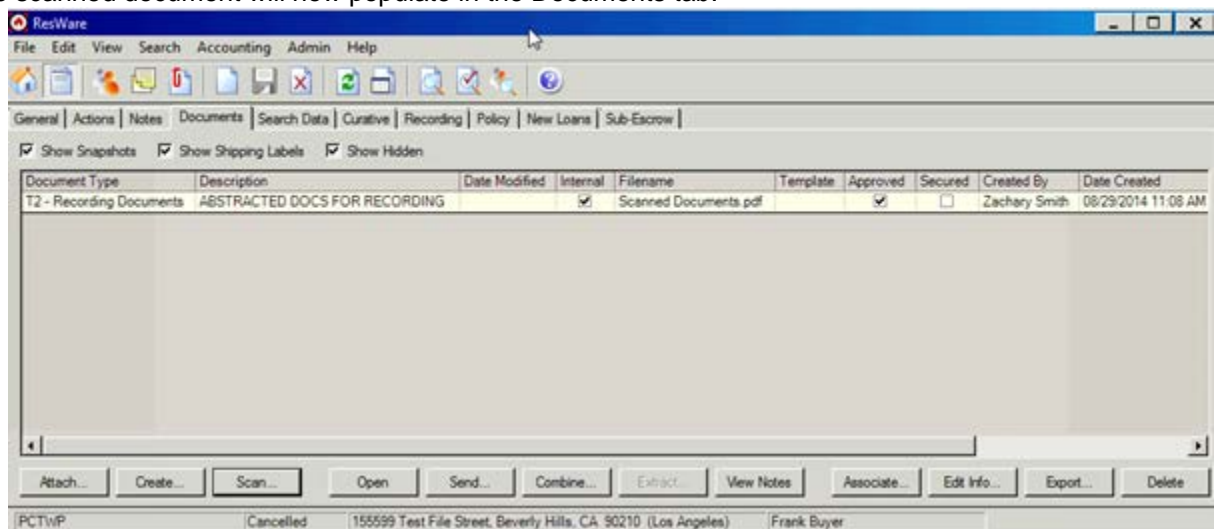
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- e. Once the Scanning is complete, you will be able to preview the scan results on the left side of the scan documents screen.
- f. Document type: Select appropriate document type. Refer to procedure: **Naming Conventions** to determine specific Document type
- g. Key in a document description. Refer to procedure: **Naming Conventions** to determine specific Document Description
- h. Click on the Internal button.
- i. Click Attach as PDF



- j. The scanned document will now populate in the Documents tab.

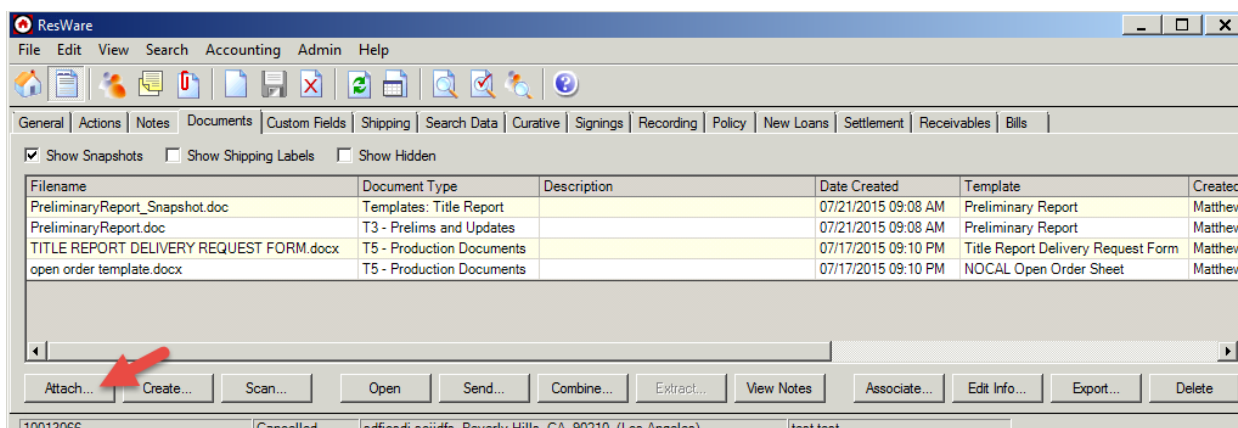


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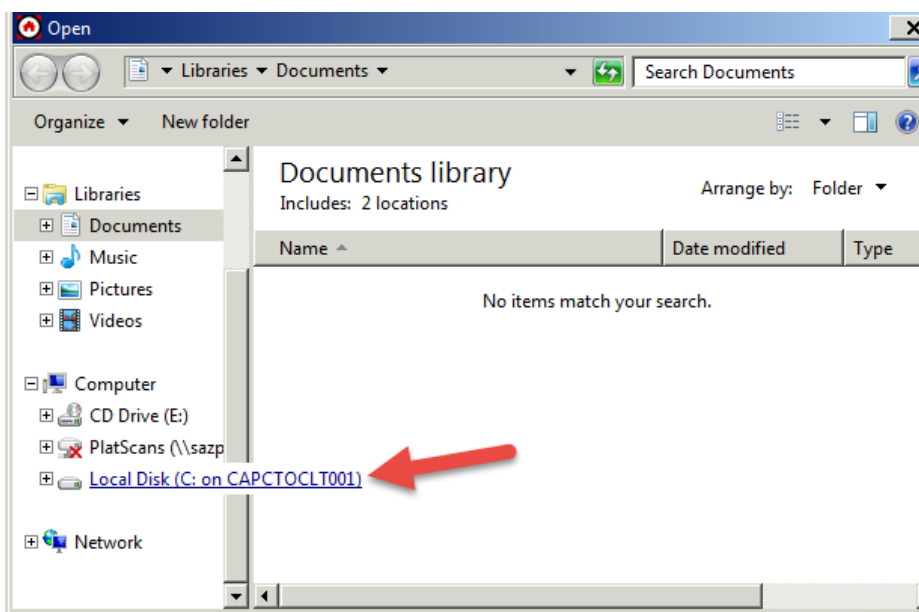
## 12.2 ATTACHING DOCUMENTS TO RESWARE

Save all your documents in a ResWare folder in C Drive. Once you create a ResWare folder in C drive, you may save a shortcut folder to your desktop, and then you will be able to drag documents from your outlook or from your computer to the ResWare shortcut folder. Consult an admin or Power User for set up on a ResWare folder.

- a. Click the Attach button



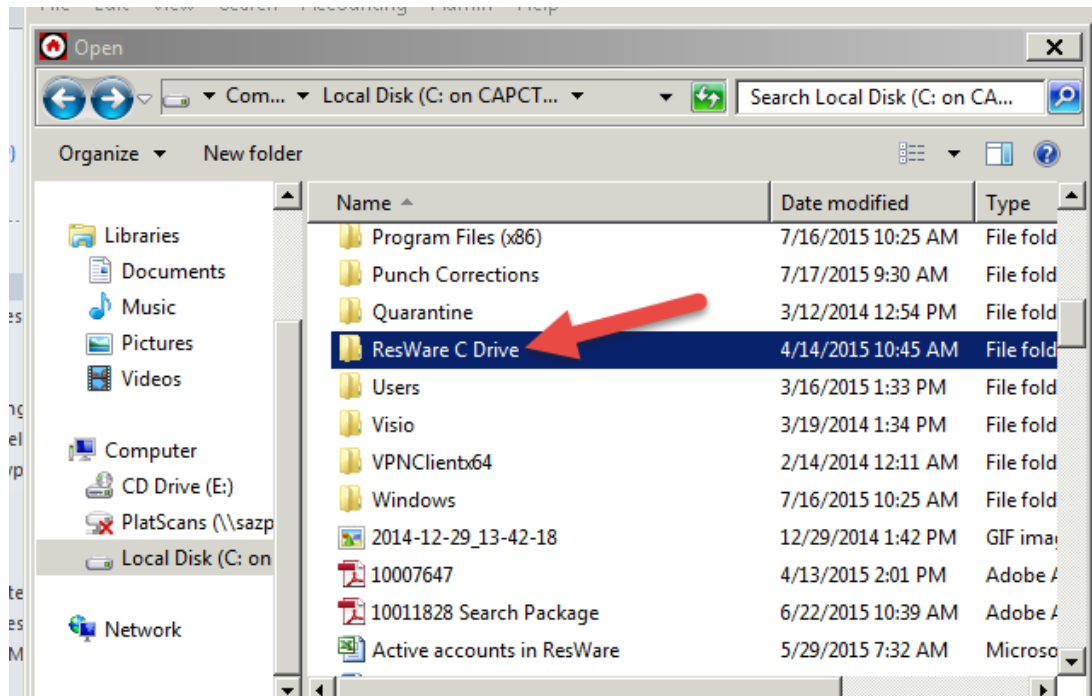
- b. Click on Local Disk C:



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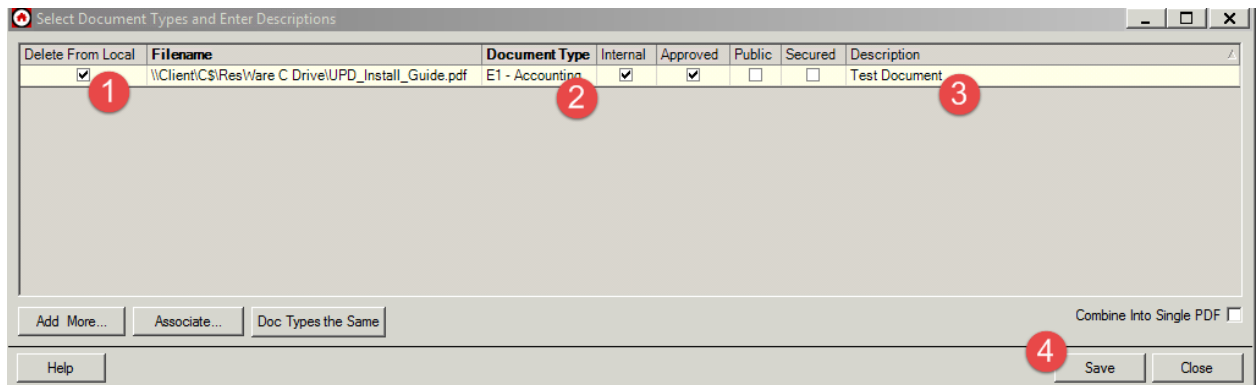


- c. Locate and open the ResWare folder



- d. Select the appropriate document(s) and click open. Note: Hold the CTRL button to enable selection of multiple documents.
- e. A ResWare attachment menu will populate. Proceed with the following steps:
- Delete From Local option: Leave the box checked if you would like ResWare to delete the original document from your C drive. After saving, ResWare will save a copy of the document to your documents tab. Most would prefer to leave this box checked to reduce clutter from the ResWare folder
  - Document type: Select appropriate document type
  - Description: Enter a description for the document
  - Click save

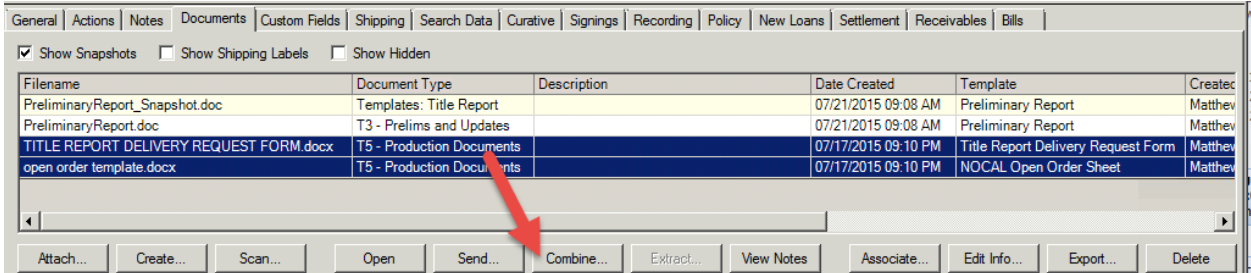
Note: If you have more than one document that you are attaching, and would like to have ResWare combine the separate documents into one document, there is a checkbox in this menu called "combine into single pdf"



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## 12.3 COMBINING DOCUMENTS

- Using the CTRL button, select all applicable documents in ResWare that you would like to combine
- Click on the **Combine** button

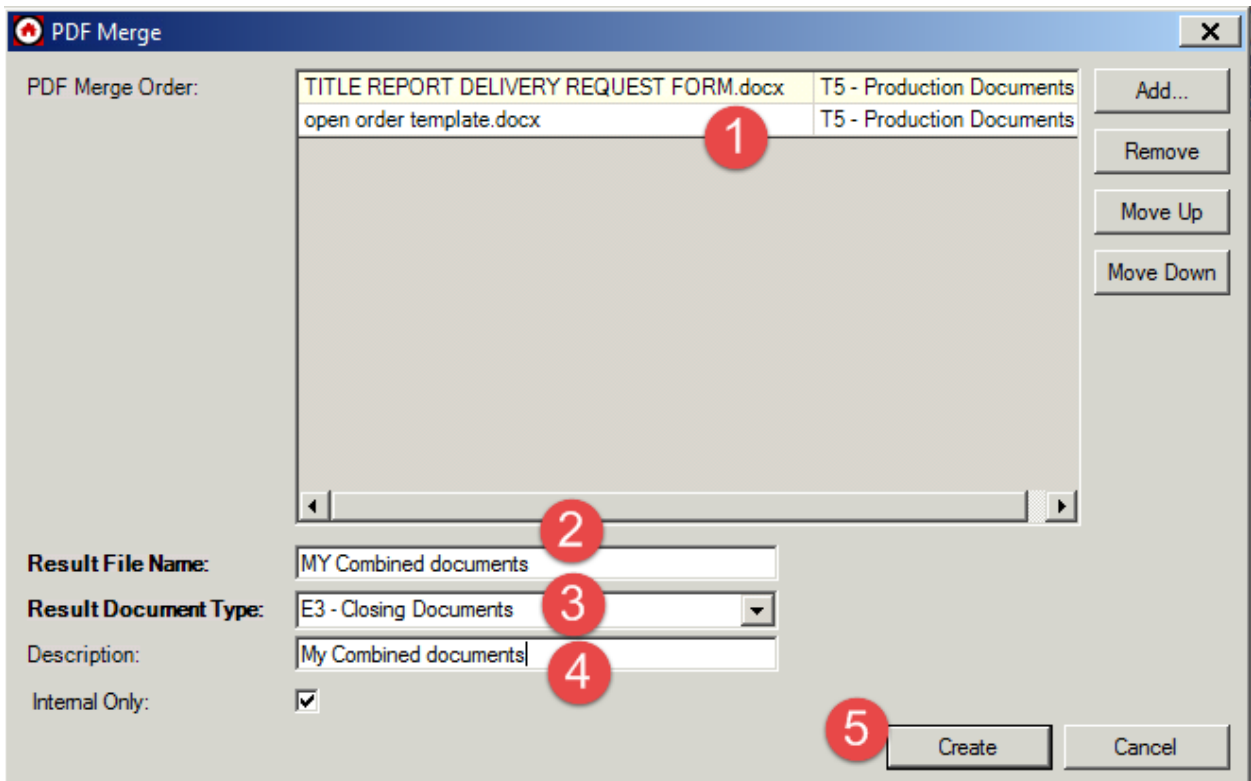


Filename	Document Type	Description	Date Created	Template	Created
PreliminaryReport_Snapshot.doc	Templates: Title Report		07/21/2015 09:08 AM	Preliminary Report	Matthew
PreliminaryReport.doc	T3 - Prelims and Updates		07/21/2015 09:08 AM	Preliminary Report	Matthew
TITLE REPORT DELIVERY REQUEST FORM.docx	T5 - Production Documents		07/17/2015 09:10 PM	Title Report Delivery Request Form	Matthew
open order template.docx	T5 - Production Documents		07/17/2015 09:10 PM	NOCAL Open Order Sheet	Matthew

Buttons: Attach... Create... Scan... Open Send... **Combine...** Extract... View Notes Associate... Edit Info... Export... Delete

- You can add, remove, move up, or move the documents down
- Result file name:** Provide a new name for the combined documents
- Result Document type:** From the dropdown, select the appropriate document type
- Description:** Type in an appropriate description
- Click create.

Note: Combining the documents will not modify any of your individual documents. They will remain intact.



**PDF Merge**

PDF Merge Order:

TITLE REPORT DELIVERY REQUEST FORM.docx	T5 - Production Documents
open order template.docx	T5 - Production Documents

Buttons: Add... Remove Move Up Move Down

**Result File Name:** MY Combined documents

**Result Document Type:** E3 - Closing Documents

**Description:** My Combined documents

**Internal Only:** ☒

Buttons: **Create** Cancel

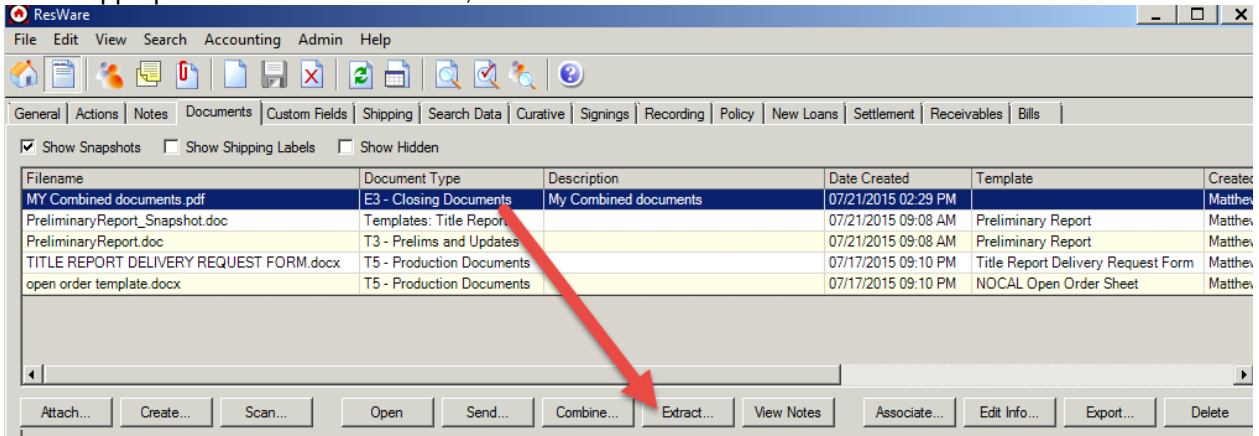
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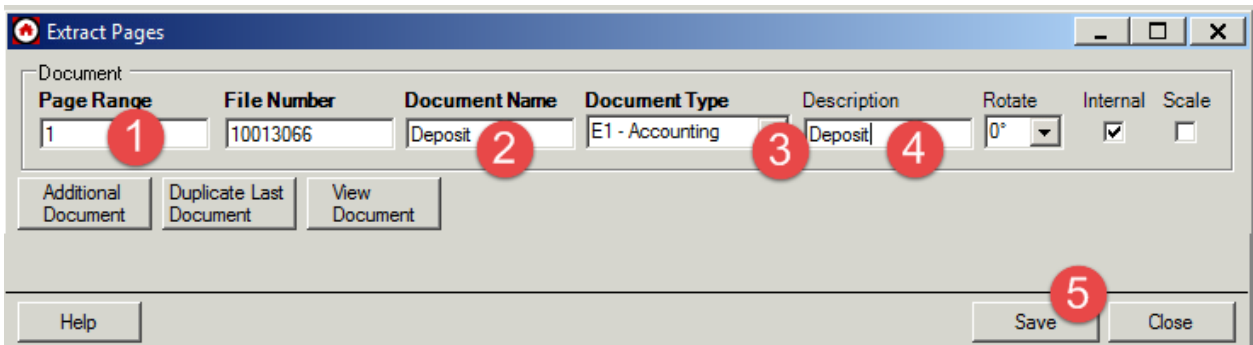
## 12.4 EXTRACTING DOCUMENTS

Utilize this function to extract specific pages of a larger document. This is good to use when you have a 50 document, and you only need page 5 of 50, or even page 5 through 10, etc.

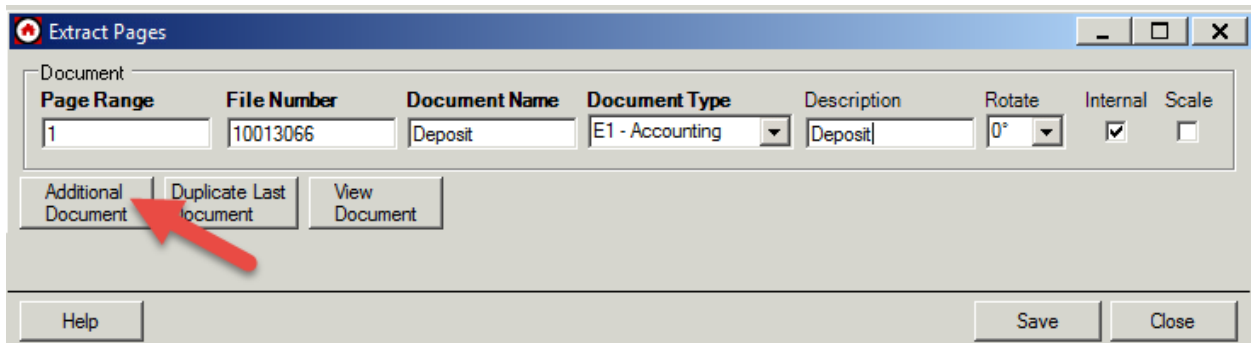
- a. Select appropriate document to Extract, and then click the Extract button



- b. Enter the page range. For example, page 1, or page 1-3, or page 1,3,5-7,9, etc  
c. Document name: Enter appropriate document name  
d. Document type dropdown: Select appropriate dropdown  
e. Description: Enter appropriate description  
f. Click Save



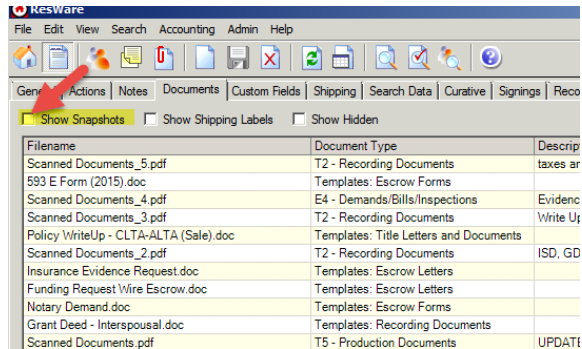
Note: Extracting the document will not modify the original document. Also, you may extract multiple separate pages by clicking on the additional document button.



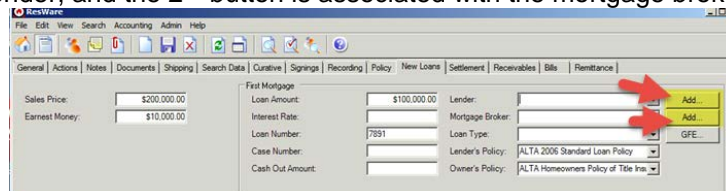
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### 13.0 FAQs

- a. **Documents tab:** I don't want to see snapshots, is there a way to turn that functionality off?
- i. Yes. Simply go to the Documents tab, and uncheck the snapshots box. This will hide all snapshots for all the files going forward.



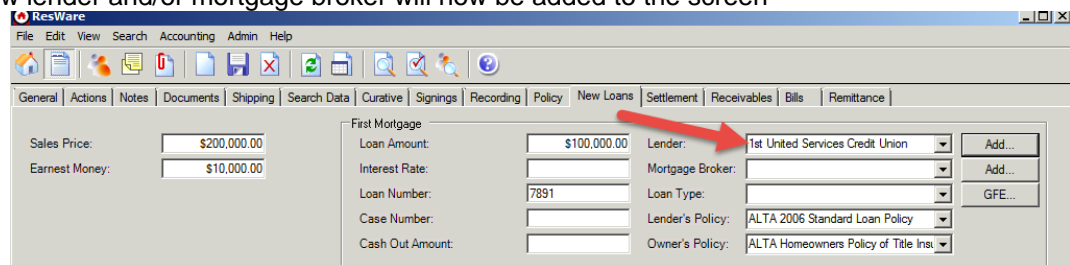
- b. **New Loans tab:** There's no lender added yet to my file. How do I add this?
- i. In the new loans tab, there are 2 add buttons associated with the first mortgage. The 1st button is associated with the lender, and the 2nd button is associated with the mortgage broker.



- ii. Enter Company name. Note: It's better not to entirely fill out the company name as there may be variations in ResWare. For example, for 1st United Services Credit Union, just type in 1st (and sometimes you may want to test out "First").
- iii. Click search
- iv. Select the appropriate partner match, and then click select.

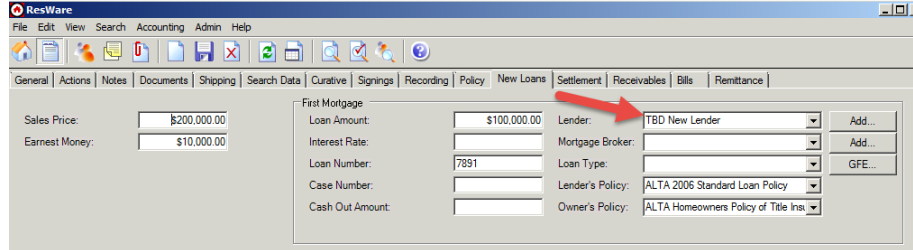


- v. The new lender and/or mortgage broker will now be added to the screen

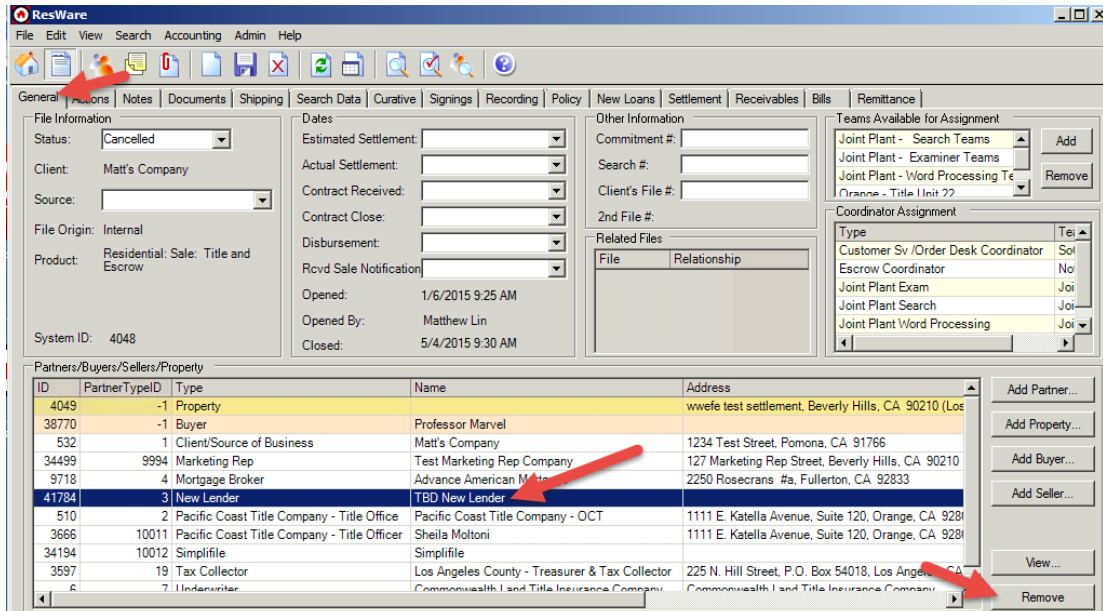


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- c. **New Loans tab:** What if I added a lender and I needed to change it (or a TBD because I was not sure yet of my lender)?
- i. First, the TBD New Lender must be removed.

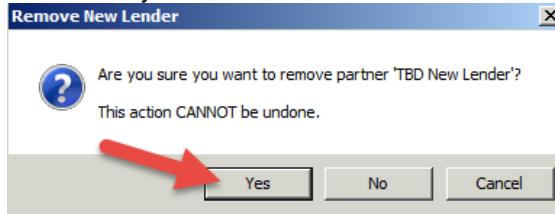


- ii. Proceed to the General tab
- iii. Click on the new lender that needs to be deleted.
- iv. Click remove



ID	PartnerTypeID	Type	Name	Address
4049	-1	Property		
38770	-1	Buyer	Professor Marvel	wwwfe test settlement, Beverly Hills, CA 90210 (Los Angeles)
532	1	Client/Source of Business	Matt's Company	1234 Test Street, Pomona, CA 91766
34499	9994	Marketing Rep	Test Marketing Rep Company	127 Marketing Rep Street, Beverly Hills, CA 90210
9718	4	Mortgage Broker	Advance American Mortgage	2250 Rosecrans #a, Fullerton, CA 92833
41784	3	New Lender	TBD New Lender	
510	2	Pacific Coast Title Company - Title Office	Pacific Coast Title Company - OCT	1111 E. Katella Avenue, Suite 120, Orange, CA 92667
3666	10011	Pacific Coast Title Company - Title Officer	Sheila Moltoni	1111 E. Katella Avenue, Suite 120, Orange, CA 92667
34194	10012	Simplifile	Simplifile	
3597	19	Tax Collector	Los Angeles County - Treasurer & Tax Collector	225 N. Hill Street, P.O. Box 54018, Los Angeles, CA 90050
6	7	Underwriter	Commonwealth Land Title Insurance Company	Commonwealth Land Title Insurance Company

- v. A Notification will prompt if you are sure you want to remove the new lender. Click yes



- vi. Once the previous lender was deleted, proceed back to the new loans tab, and add the new lender as shown from the first section of FAQs.

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- d. **Searching for a Partner:** What if I am searching for my new lender/mortgage broker, but I cannot locate, or they are not in the system?
- i. Contact an Escrow Power user for additional assistance in locating and/or adding a new lender and/or mortgage broker.
- e. **Transaction types/Product types:** What type of transactions and product types are available in ResWare? What are the differences?

Transaction type	Product Types	Notes
Residential or Commercial	Loan: Title and Escrow Sale: Title and Escrow Sale (CASH): Title and Escrow	Having both Title and Escrow means that PCT will at least play some role in both the Title and Escrow, even if the title report and policy is not underwritten by us
Residential or Commercial	Loan: Escrow Only Sale: Escrow Only	Escrow Only means that Title is completely done by an outside Title company; no intervention from PCT Title Units
Residential or Commercial	Loan: Title Only Sale: Title Only	Title only means that Escrow is completely done by an Outside Escrow Company; no intervention from PCT Escrow Units.

- f. **Settlement tab:** What does the Itemize button do?
- i. There are certain fees where you may want to show itemized on a separate page on the HUD

Supplemental Page HUD-1 Settlement Statement		
Itemization	Buyer	Seller
Line 1104		
a. Lender's coverage \$900.00 Premium \$50.00 to TBD - Marketing Rep	\$50.00	
<b>Total:</b>	<b>\$50.00</b>	<b>\$0.00</b>

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- g. **Settlement tab:** What does the 0s and the F button do?
- Regarding 0s:** ResWare normally does not show any dollar amount for a specified line item with no fee. By clicking on the 0s, ResWare will show a 0.00 for that particular fee
  - Regarding F:** for hud line descriptions with no fees, ResWare will not show the line item description on the HUD. The F button will "force" an item that has no charge to show on ResWare.

- h. **Settlement tab/Payoffs sub tab:** How do I add the charges and fees for payoffs?
- In each payoff item that you add, there is a charges and fees link. Click on the link to reveal the possible payoff charges and fees

- A Charges and Fees screen will populate. Click Add

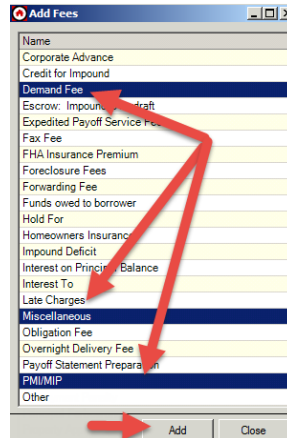
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## MANUAL: TIPS AND TRICKS (T&T)

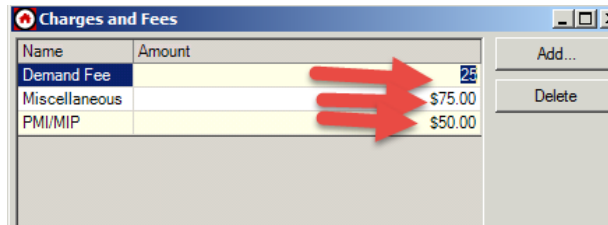
### GROUP: ESCROW



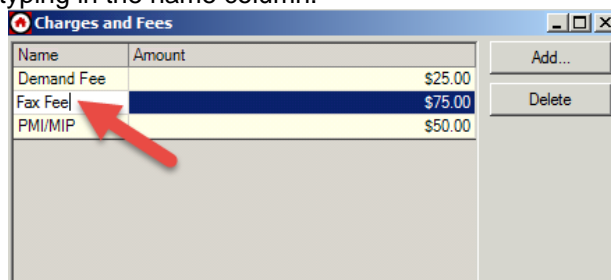
- iii. Hold the CTRL button, and select any/all applicable fees. If you cannot locate a fee that matches your requirement, select the Miscellaneous fee
- iv. Click Add



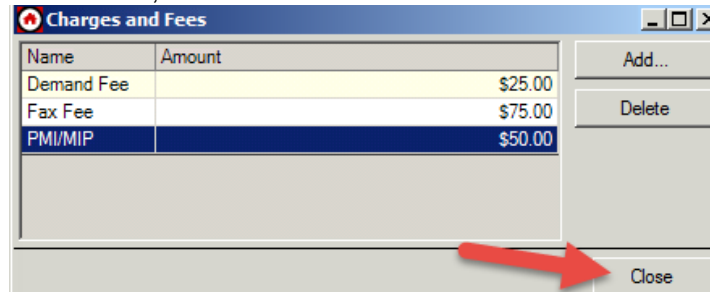
- v. Enter all applicable fees in the amount column



- vi. Note here that the Miscellaneous has been changed to "Fax Fee". You have the ability to manually override the name just by typing in the name column.

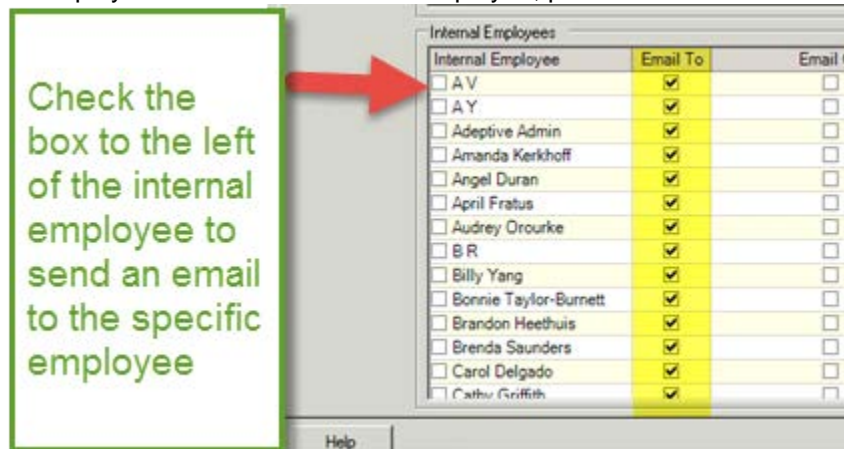


- vii. Once all applicable fees are added, click close



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- i. **Emails:** I see a fax section, so does that mean that I am able to fax to our clients?
  - i. The fax option within ResWare is currently not operational at the moment. You'll have to fax using other resources.
- j. **Emails:** I see a lot of check boxes in the **Internal Employees** section. The column name is "Email To". Does that mean I am emailing to everybody?
  - i. You are not emailing to everybody. The checkbox simply means that there is an email address associated with the employee. To email an internal employee, place a check to the left of the name



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## REVISION HISTORY

Rev.	Date	Section(s)	Description
0.1	7/22/2015	All	New document

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