



**TEXAS TITLE**

*A Place to Call Home™*

ready<sup>2</sup>  
close™

## Agent Instructions Manual

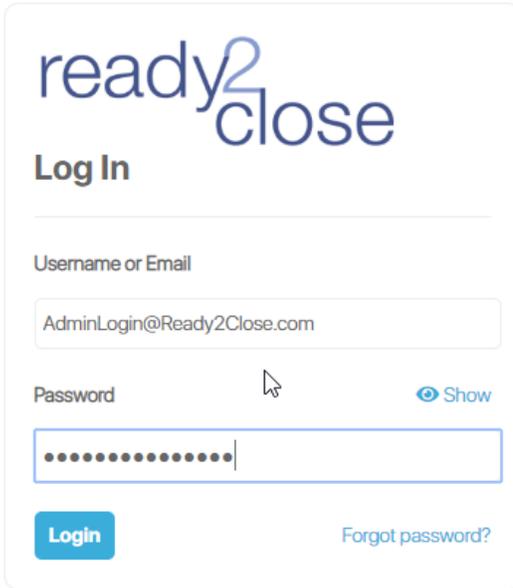
Contact for questions:

Desiree Dyer

[ddyer@texastitle.com](mailto:ddyer@texastitle.com)

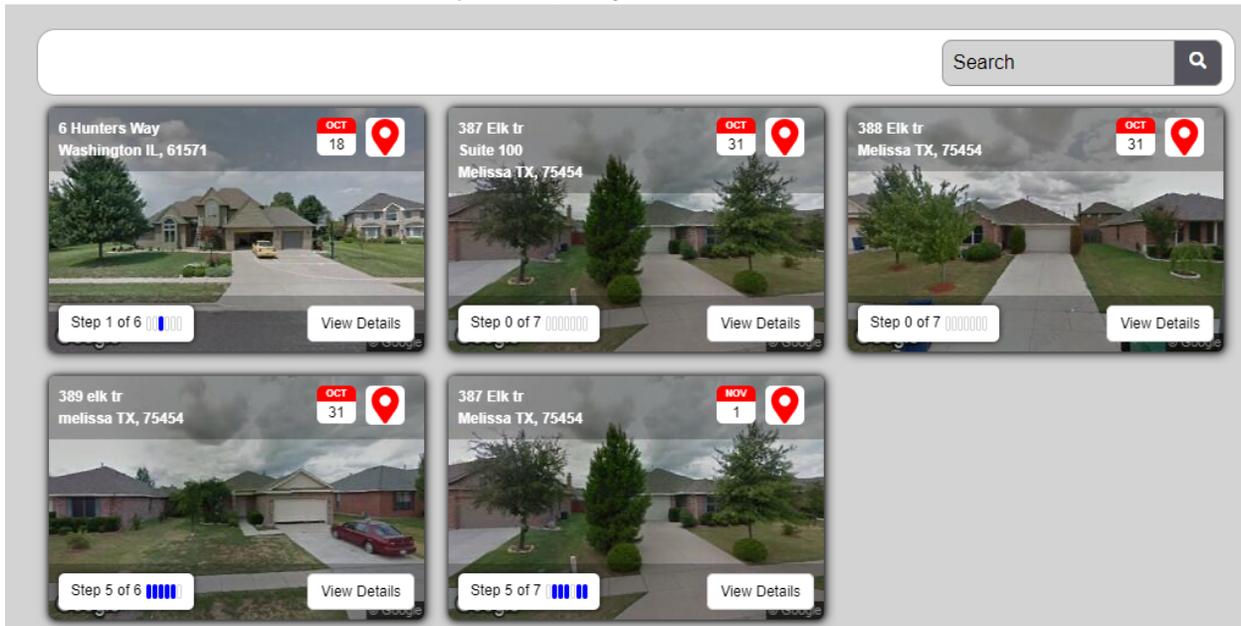
# Order Summary

1. Type in your provided default admin credentials



The image shows a login form for Ready2Close. At the top, the logo "ready2close" is displayed in a blue, sans-serif font. Below the logo, the text "Log In" is centered. There are two input fields: "Username or Email" containing "AdminLogin@Ready2Close.com" and "Password" which is currently masked with dots. A "Show" button with an eye icon is next to the password field. At the bottom, there is a blue "Login" button and a link for "Forgot password?".

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

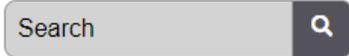


The image shows a dashboard interface with a search bar at the top right. Below the search bar, there are five property cards arranged in two rows. Each card features a street view image of a property, a title with address and location, a date in a red box, a location pin icon, a progress bar, and a "View Details" button.

Address	Location	Date	Progress	Action
6 Hunters Way	Washington IL, 61571	OCT 18	Step 1 of 6	View Details
387 Elk tr Suite 100	Melissa TX, 75454	OCT 31	Step 0 of 7	View Details
388 Elk tr	Melissa TX, 75454	OCT 31	Step 0 of 7	View Details
389 elk tr	melissa TX, 75454	OCT 31	Step 5 of 6	View Details
387 Elk tr	Melissa TX, 75454	NOV 1	Step 5 of 7	View Details

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

a. Type in the search bar



b. Files can be searched by property or date in the below formats

i. Closing Date Month (Ex: October)

ii. Closing date (Ex: 31)

iii. Closing Date Formats

1. 10/31/2019

2. 10-31-2019

iv. Property Address

1. Address 1

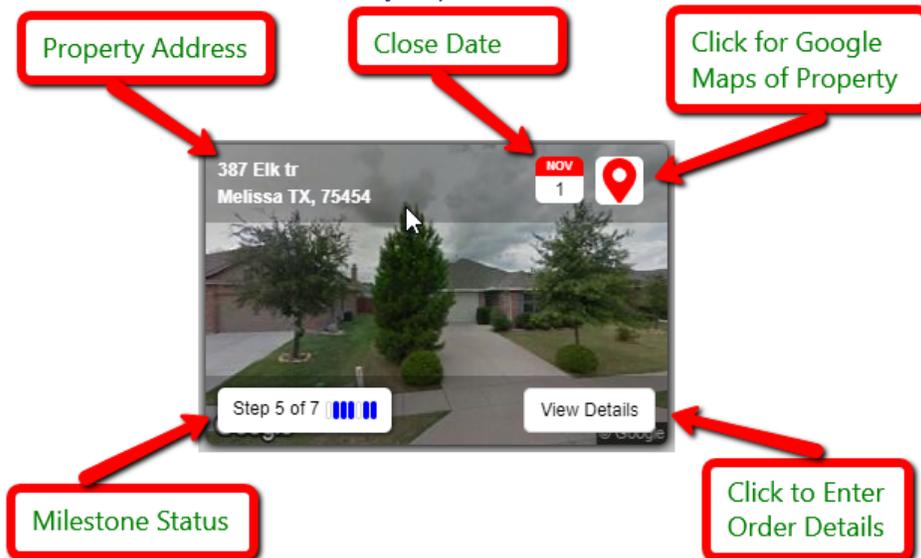
2. Address 2

3. City

4. State Abbreviation

5. Zip Code

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



6. Click on "View Details" to enter the file

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



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

### File Details

**File Number**

R2C\_Neil

**Property Address**

389 elk tr  
melissa, TX 75454

**Sales Price**

\$0.00

**Loan Amount**

\$170,000.00

**Buyer(s)**

Bobby Buyer

**Seller(s)**

Sally Seller

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

### Closing Details

**Closing Date**

10/31/2019 at 8:00 am 

Click on the Calendar Icon to create a calendar event in your default calendar program

**Closing Location**

Pacific County Title Company  
905 West Robert Bush Drive  
PO Box 306  
South Bend, WA 98580

Click on "View Map" to see a Google Maps image to the Closing Location

 [View Map](#)

On a mobile device, tap the phone number to call the Settlement Agent

**Settlement Agent**

Settlement Agent  
Settlement Agent Company  
(469) 831-9768

Click the email address to email the settlement Agent

 [r2cSettlementAgent@gmail.com](mailto:r2cSettlementAgent@gmail.com)

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

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

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

## My Team

### buyer Realtor

Buyer Realtor

(888) 888-8888

buyerrealtor@ramquest.cm

On a mobile device, tap the phone number to call the contact

### Buyer Attorney

Buyer Attorney Company

(469) 831-9768

r2cBuyerAttorney@gmail.com

Tap the email address link to email the contact using your default mail program

### Lender Contact

Lender Company

(469) 831-9768

r2cLender@gmail.com

## Documents

1. Scroll down or click the Documents link in the order header. 
2. From this section, documents that have been shared with the consumer will be listed.

### Documents

<input type="checkbox"/> Document	Actions	Received
<input type="checkbox"/> <a href="#">Server Move Request Form</a>	⚠ 1 of 2	11/6/2019 at 8:24 am
<input type="checkbox"/> <a href="#">GRANTING ACCESS TO RAMQUEST WEBSITE</a>	⚠ 2 of 2	11/6/2019 at 8:24 am
<input type="checkbox"/> Standard Pricing for Support Services	⚠ 0 of 1	11/6/2019 at 8:24 am

3. From this section a consumer, can download documents, upload documents, and e-sign documents.
4. To download a document(s), check the box to the left of the document description and select Download

### Documents

<input type="checkbox"/> Document	Actions	Received
<input checked="" type="checkbox"/> <a href="#">Server Move Request Form</a>	⚠ 1 of 2	11/6/2019 at 9:21 am

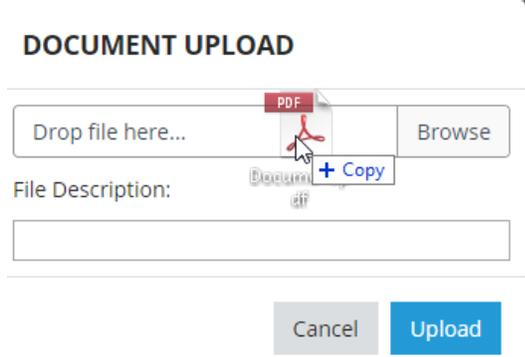
Select Download

Check the box

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



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



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

8. Select “Upload” 

**NOTE:** Once the document has been uploaded, it will be viewable only by the role that loaded the document. The Title Company can apply permissions in configuration for other roles to see the document.

**NOTE:** The uploaded document will be placed into the document management system of the TPS software on the next interval for pushing data to Ready2Close.

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

### Documents

<input type="checkbox"/> Document	Actions	Received
<input type="checkbox"/> <a href="#">Server Move Request Form</a>	 1 of 2	11/6/2019 at 9:39 am

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

### CONSENT FOR USE OF ELECTRONIC SIGNATURES AND RECORDS

**Consent for use of electronic signatures and records:**

Pavaso is required by law to provide you with certain disclosures and information about your loan application ("Required Information"). With your consent, Pavaso can deliver Required Information to you by: Displaying or delivering the Required Information electronically, and Requesting that you print or download the Required Information and retain it for your records.

This notice contains important information that you are entitled to receive before you consent to electronic delivery of required information. Your consent also permits the general use of electronic records and electronic signatures in connection with your application. Please read this notice carefully and print or download a copy for your files.

After you have read this information, if you agree to receive Required Information from Pavaso electronically, and if you agree to the general use of electronic records and electronic signatures in connection with your relationship with Pavaso, please click on the "I agree" button where indicated.

Statement of electronic disclosures:

You may request to receive Required Information on paper, but if you do not consent to electronic delivery of Required Information, Pavaso cannot proceed with the acceptance and processing of your electronic application

If you consent to electronic delivery of Required Information, you may withdraw that consent at any time. However, if you withdraw your consent we will not be able to continue processing your application.

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

### EDIT YOUR SIGNATURE & INITIALS

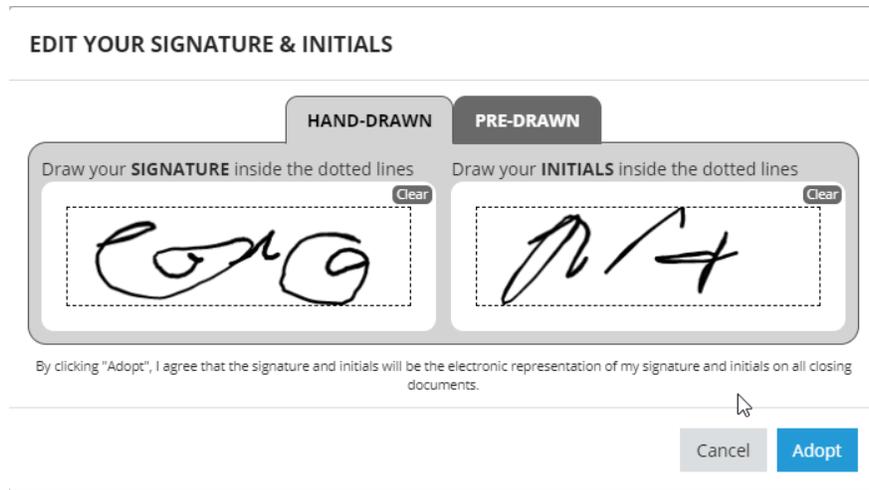
**HAND-DRAWN** **PRE-DRAWN**

Draw your **SIGNATURE** inside the dotted lines

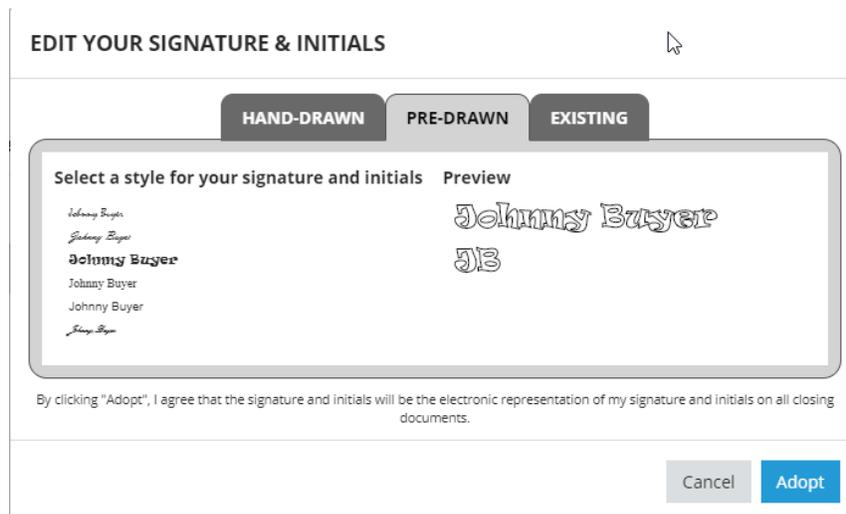
Draw your **INITIALS** inside the dotted lines

By clicking "Adopt", I agree that the signature and initials will be the electronic representation of my signature and initials on all closing documents.

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



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



14. Select “Adopt” to save your changes. 

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

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

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



17. View the needed actions on a document by clicking the "Actions button". ⚠️ 1 of 2 Action(s) Complete

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

**ACTIONS ON THIS DOCUMENT**

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You have completed **1 of 2** action(s) required for this document.

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✔️ Review Document

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⚠️ Sign Document

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[Close](#)

19. Select Close to close the window. [Close](#)

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

21. Click where you want to apply the signature.

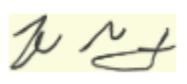
22. Using the buttons indicated below, move and resize the signature as needed.

The diagram illustrates the signature tool interface. At the top, three red-bordered boxes contain the labels: "Resize smaller", "Resize larger", and "Delete signature". Below these, a red-bordered box contains "Click and drag to move the signature" with a four-way arrow icon. In the center, a toolbar shows a font size selector (two 'A's), a trash can icon, and a signature icon. Below the toolbar, two examples of a signature are shown on a yellow background. The first example is labeled "Susie B. Seller" and has a small signature icon above it. The second example is a larger signature also labeled "Susie B. Seller".

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

24. Click where you want to apply the initials.

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



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

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

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

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

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

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

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

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



34. To apply today's date, click on the “Date” button 

35. Click where you want to apply the date.

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

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



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



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



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

## Actions

 2 of 2

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

# Wiring instructions

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

Wiring Instructions

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

## Configurable instructions for the wiring process

### Instructions

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

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

ON-LINE BANKING TRANSFERS ARE NOT ALL THE SAME.

## Settlement Agent contact information

### Contact

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

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

Click to generate a new email

## Bank Information

### Bank Information

#### American National Bank

8990 West Doge Road  
Omaha, NE 68114

#### Phone

(555) 111-1111

#### Fax

(555) 222-2222

#### ABA

009054873

#### Bank Wire Account Number

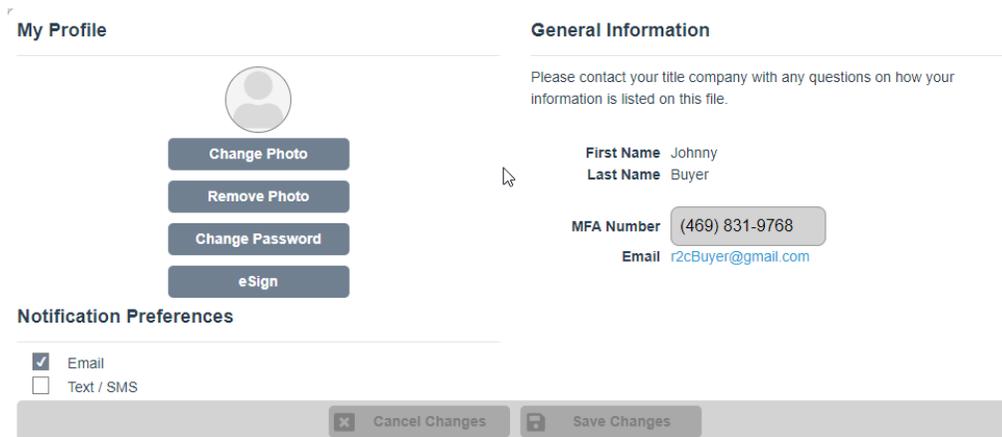
834200006125

#### Account Name

American National Bank

# Consumer User Profile

1. Once logged into Ready2Close, there is an icon on the top right you can select to access and edit your user profile. Select the three horizontal lines at the top right of the page. 
2. A pane will open on the left side of the screen. Select "My Profile". [My Profile](#)
3. A new page will present that gives you some editable options to change key points of your profile.



**My Profile**

**General Information**

Please contact your title company with any questions on how your information is listed on this file.

**Change Photo**

**Remove Photo**

**Change Password**

**eSign**

**Notification Preferences**

Email

Text / SMS

**Cancel Changes** **Save Changes**

**First Name** Johnny

**Last Name** Buyer

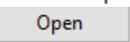
**MFA Number** (469) 831-9768

**Email** r2cBuyer@gmail.com

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

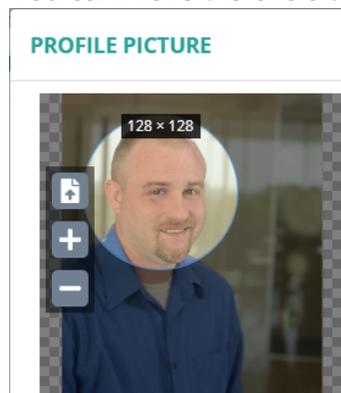
- a. To upload a photo, click the "upload" button 

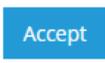
- b. Browse and select the photo you want to load.

- c. Select "Open" 

- d. Zoom in or out to align the image circle with what you want to show  

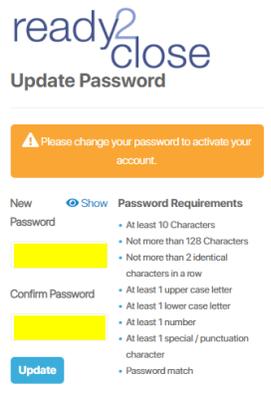
  - i. You can move the circle to highlight what you want to display



- e. Select "Accept" to save your change 

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

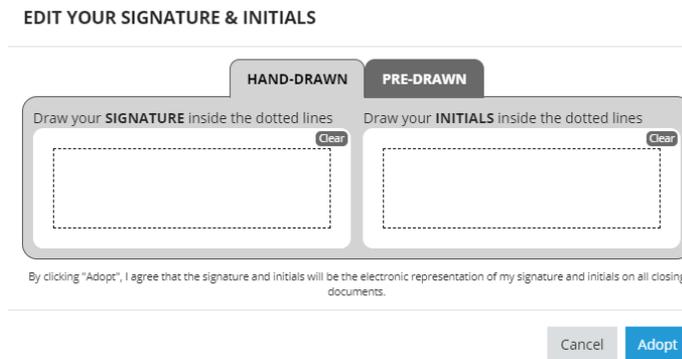
6. Select “Change password” to Change your password Change Password
  - a. You will be prompted with a confirmation
  - b. Select “OK” Ok
  - c. You will be re-directed to the login screen.
  - d. Log in again, and will then be prompted with a screen to change your password.



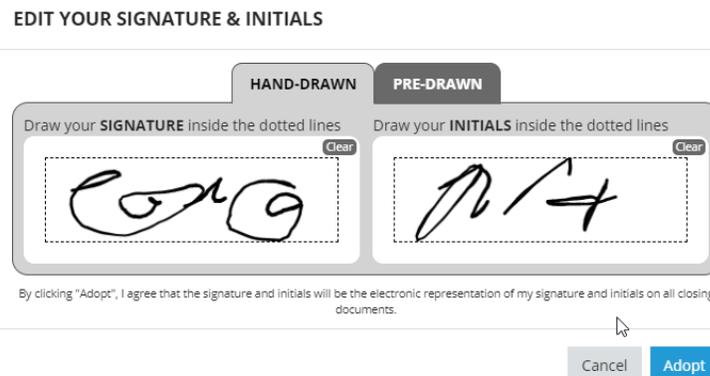
- e. Type in your new password in both highlighted fields above.
  - i. The password has requirements that are displayed on the screen and grey out when they have been met.
- f. Select “Update” Update

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

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



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



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

EDIT YOUR SIGNATURE & INITIALS

HAND-DRAWN PRE-DRAWN EXISTING

Select a style for your signature and initials Preview

Johnny Buyer  
Johnny Buyer  
Johnny Buyer  
Johnny Buyer  
Johnny Buyer  
Johnny Buyer

Johnny Buyer  
JB

By clicking "Adopt", I agree that the signature and initials will be the electronic representation of my signature and initials on all closing documents.

Cancel Adopt

11. Select “Adopt” to save your changes.

Adopt

12. You can choose your preferred method of communication in the “Notification preferences” section of the page.

- Checking the box will ensure you receive that type of notification.
- Un-Checking the box will ensure you do not receive that type of notification. Both are checked by default.

### Notification Preferences

- Email
- Text / SMS

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

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

14. Select “Save Changes” to save your changes

Save Changes

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

# Help and Support

1. Select the three horizontal lines at the top right of the page. 
2. A pane will open on the left side of the screen. Select "Help and Support". [Help & Support](#)
3. Configurable contact information for the title company is presented that the user can contact.  
**Help & Support**

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Should you have any questions or issues regarding your documents or information related to your closing, please contact:

**Fred James**

Title Company

 (555) 555-5555

 [dreedsparks@ramquest.com](mailto:dreedsparks@ramquest.com)

4. Select the three horizontal lines at the top right of the page. 
5. Select "Sign Out" [Sign Out](#)