

SETTLEMENTROOM SYSTEMS, INC.
Where Time Is Money



Basic User Training Manual

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Introduction: Rules of Thumb

A few guidelines to remember that will help you to understand SettlementRoom:

- Rows of Tabs: The lower row of tabs on your screen is used for your current transaction, while the top row of tabs is used with multiple transactions and managing your general account.
- Checkboxes and Action Menus: When you see *checkboxes* beside any item on the screen, it means you may click the checkbox to make selections. Generally, once items are selected, you will have an “**Actions Menu**” on the right side of the screen where you may click on an action to apply to your selected items.
-  (Pencil) and  (Eye) Icons: Clicking on the **pencil icon** beside an item will allow you to edit the properties of that item. Clicking on the **eye icon** beside an item will allow you to view the properties of that icon.
- Using the Summary Tab: Clicking on the **Summary** tab in the group of green tabs at the top of your screen will give you an “**Actions Menu**” of commonly used actions (i.e. inviting contacts, posting messages, etc). You may use any of these links as “shortcuts” instead of going to the tabs.

How to Use This Manual

Steps 1 through 5 should be done in sequence when starting a new transaction. The additional sections marked with > are used anytime, and do not need to be used in the “start transaction” sequence. You will find tips and noteworthy items denoted by .

1. Entering a New Transaction (Click “Start” on the Left-side Menu)

- A) Click “Start” under the green Transactions heading on the left-hand menu. You will be taken to the “Start a New Transaction” screen.
- B) Click “Continue” to proceed to the “Start / Refresh a Transaction” screen.
- C) Click “Start a listing or a purchase / sale transaction”.
- *Loan Only* transactions are for refinance transactions, used by Mortgage and Title Users.
 - Disregard the “Integration ID” section unless you are working with a specific product that exchanges data with SettlementRoom.
- D) On the “Transaction Details” page, enter the address of the property you are creating a transaction for. Click the “Save” button at the bottom.



DO NOT click your “back” button on this screen. You must complete the required fields and click “Save” in order to continue. You may always edit the Transaction Details later.

- E) You will come to the full “Transaction Details” screen. Fill in as much or as little information as you would like.



You may choose to leave fields blank, these fields will not display as empty spaces later. Only fill in fields that you would like displayed.



Placing your mouse over (not clicking on) the Ts, Ds, and Ns to the right of the input fields will display formatting tips for entering data.



About Key Dates: Listing, Contract and Closing dates are important. If you have Preloaded Task Lists from which due dates should be calculated, the system will use the dates in these fields to calculate the actual due dates for tasks within the given transaction

- F) Click “Save” at the bottom of the page to keep your entries. You will be directed to the “Transaction Summary Tab” (You may reach this page at any other point by clicking the green tab that says “Summary”).



To make changes to the Transaction Details, click on the Summary Tab and then “Edit Transaction Details” from the list of links to the right.

2. Assigning Preloaded Items: Click “Preloaded” tab

- A) Click on the “Preloaded” tab to view your Preloaded Items. These are tasks checklists, contacts, names of vendors, and other items that are saved in your account for re-use.
- B) Click the checkbox beside each item on the screen that you wish to add to your new transaction. You may select any combination of categories, vendors, contacts, documents, weblinks, messages, or tasks.




Upon being added, any contacts and vendors you select will receive an automatic email invitation to your current transaction. Upon assignment, Preloaded Tasks will automatically calculate a due date and add themselves to your calendar.

- C) After checking the boxes, click “Add Items to Current Transaction” from the Action menu on the top right. Do not double-click; doing so will add the items twice.


3. Inviting Contacts: Click “Contacts” tab

You may have already selected some contacts from the Preloaded Contacts screen and added or invited them to the transaction. This step will allow you to invite additional transaction contacts who are not already in your Preloaded Contracts (including buyers and sellers).

- A) From the Action menu on the right, click “Invite / Add a Contact”.
- B) Fill out the contact information in the spaces provided. Only the first name, last name, and e-mail address are required.

 If you accidentally misspell the first or last name, the username created by the system will also be misspelled. If this happens, please contact Support for assistance. If you misspell the contact’s email address, the invitation will not be sent to the correct mailbox. The contact must be removed and re-entered.


- C) The Invitation Information Section is a setting that designates whether an invitation will be sent to a user, and what type of invitation should be sent. The following table outlines the possible invitation types.

 If you make an error selecting the invitation type you must contact Support for assistance in making the change.

Selection	Recommended For	Description of Access Level
Summary Only	Nearly All Invited Contacts	<ul style="list-style-type: none"> • See a simplified screen summarizing transaction • Displays banner of your choice • Can view tasks, messages, documents, etc (as long as you give them permission to do so) • Can not edit items written by other members of the transaction • Can post messages, upload documents, and fax in documents
Full Site	Rarely – Only contacts who will be partial administrators of the transaction	<ul style="list-style-type: none"> • Able to see Event Log, create Tasks and Orders, Invite Contacts, and run reports • Displays SettlementRoom banner

Not Invited	Contacts whose contact information you would like to display on the transaction, but who you do not wish to give login access	<ul style="list-style-type: none"> • Not invited via e-mail • Unable to receive most system notifications • Contact information will display as part of record and on case sheet
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- D) Click “Save” at the bottom of the screen. The contact will now receive an e-mail containing a unique username and password that allows them to log onto the transaction, along with a link to the transaction itself.

 You may also remove contacts or resend a contact his or her password. To do so simply click the checkbox beside the contact in question and select “Remove Contact” or “Re-send Password from the Actions menu on the right.

4. **Editing the Task List: Click “Open Items Tab”**

It is always a good idea to double-check the task list for each transaction. Even though you may be using Preloaded Tasks, contracts are often written differently, and dates sometimes need to be adjusted. Ultimately, you will want your “master” calendar to be as accurate as possible, and taking a moment to review the tasks will help.

- A) Click the “Open Items” tab to view the Transaction Task List in its entirety.
- B) Editing Tasks: Click the pencil icon next to any task to edit it. You may change the due date, select parties to receive reminder e-mails, or edit any part of the page. Your changes will not affect your Preloaded Task List, only the current transaction.
- C) Deleting Tasks: You may delete selected tasks by checking the checkboxes beside each task you wish to delete. Then, click “Delete” in the Action menu on the top right.


- D) Adding Additional Tasks: To add a task that will be unique to a particular transaction, click the “New Task” link under the Action menu in the top right. Enter the task details, and click “Save”.
- E) More About Adding Tasks:
- Subject: This will display in your calendar
 - Additional Description: Optional field to further explain the task.
 - Reminder E-mails: These will automatically be delivered unless the task is marked complete before the designated due date. Either select the number of days before the due date for a reminder e-mail to be sent, or enter a 0 to indicate you do not want reminder e-mails.
 - Due Date: The system will automatically calculate a due date for your tasks and post this date on the calendar. Task due dates can be calculated relative to the listing date, contract date, or closing date. Make your selections under the “Due Date Section” area. Selecting “simple” due date will allow you to enter your own date, in month/date/year format.
 - Privacy: Making a task private means that it will not be visible to invited transaction guests, once added to a transaction. You have an option (in the “Team Setup” screen under your Preferences) to allow certain members to see private tasks.

5. Posting Documents: Click “Documents” Tab


There are several methods for posting a document to a transaction. If you have scanned your document and/or have it in an electronic format (for example, a .PDF or .DOC file), you may upload the document. If the document is in hard copy (on paper), you may fax it directly into your transaction.

Uploading Documents

- A) You must have a file saved on your computer in a known location. There is a 3 MB file size limit per document. Documents can be in any file format.



 Upload files in common file formats so that your intended recipients are sure to have the appropriate software to open the files. Also, try to keep file sizes as small as possible for people who might have slower internet connections (less than 500 kb per document is suggested).

- B) Click on the “Upload a Document” link in the Actions menu on the right.
- C) Type in a description of the document that will appear on the transaction.
- D) Click the “Browse” button, and select the file you wish to upload from your computer. When the filename is highlighted, click “Open”.
- E) Document Access: You will see the names of your invited transaction guests at the bottom of the page, listed under, “Permission to View.” This list represents the contacts who are invited to your current transaction. Permission to view means that when the user logs into the transaction, they will be able to view and print the document that you are uploading. If you do not select a contact under “permission to view,” they will simply not see the document on their screen when they login. Use the checkboxes beside each name to give viewing permission.

 If you select “Everyone,” each of the names on the list will see the document when they login, as well as any contacts you invite at a later date.


- F) Under “Send document by e-mail,” checking the boxes beside the name(s) of listed contacts will automatically email the document as an attachment to each contact selected.

Faxing Documents To SettlementRoom

- A) Under the Action menu on the right, click “Fax In a Document”.
- B) A window will open on your screen. Usually, it will read “Explorer User Prompt”. Type in the name of the document as you wish it to appear in the transaction, and then click “OK”.
- C) You will see the cover page appear on your screen in a pop-up window. Immediately afterward, you will see the “Print” dialogue box appear on the screen. Print the cover page.
- D) Place the cover page on top of your document. Your document can be any number of pages in length, but the cover sheet **MUST** be the first page in the stack in order to post your document. Fax the document to **415-796-9696** (this number is also provided on the cover sheet).
 -  If you plan to fax in documents frequently, you may want to program the fax number into your fax machine.
 -  If you are faxing several documents, you must make sure they are each faxed as a single transmission. Some fax machines have a feature called “batch send” which will group faxes together which are going to the same fax number. If you have this feature, you need to turn this feature off, or wait several minutes between faxes.
- E) Document Access: Everyone invited to your transaction will be able to see and print a document that has just been faxed into the site. However, you can edit access permissions once the document has been posted on the transaction.

Other Document Options


A) To view a document, click on the document description.

 For most types of documents doing so will cause the document to be downloaded to the “Temp” directory on your own computer, and then automatically opened using the correct software. If your computer does not recognize the document’s format, you may be asked if you wish to save the document. You may save the document until you can obtain the appropriate software to open and view the document.


B) The time it takes to open a document will vary depending on the speed of your Internet connection and the size of the file.

C) To print a document, follow the instructions to open the document on your computer, and then use the “File → Print” option for most software applications.

D) To edit or e-mail a document, click the pencil icon beside the document title. You may edit the document description, change the viewing permissions, or e-mail it to your contacts. Make your changes, then click “Save”.



 If you have previously selected to send the document by email to selected contacts, the check will still be in the box beside his or her name. If you do not want the document to be emailed to the contact again, you must remove the check from the box.

E) To delete a document, first check the box beside each document you wish to delete. Then click “Delete” on the Actions menu on the right.

 You may only delete a document if you are the one who placed it there or if you have been given permission to delete it by the person who did.

- F) Your document should be posted within minutes by our automated system. If your document does not appear within a few minutes, it means that our systems were unable to read the text on the cover sheet of your fax. There are many possible reasons for this, including low quality printing of the cover page, and low resolution faxes. When this occurs, the document is routed to the Support Staff for manual uploading, which usually takes about an hour. We guarantee the document will be uploaded within one business day.

➤ **Posting Messages**

- A) Posting a New Message: Click “New Message” under the Action menu on the right. Enter the Message Subject and Content in the spaces provided.
- B) Setting Message Access: You will see the names of your invited transaction guests at the bottom of the page, listed under “Permission to View.” These are contacts who are invited to your current transaction. If a user has “Permission to View”, when he or she logs on to the transaction, they will see the message automatically displayed. If you do not give a contact permission to view a message, they will simply not see it. Use the checkboxes beside each name to set viewing permission.
-  If you select “Everyone,” each of the names on the list will see the message when they login, as well as any contacts you invite at a later date.
-  You may post a message without giving anyone else permission to view it, and thus make a private note in the file. Keeping such notes in SettlementRoom will make the transaction archive more complete.
- C) Email a Message: Under “Send by email to,” if you check the checkboxes beside the name(s) of the contacts in that list, the system will automatically email the message to each of those parties.

➤ Working with the Calendar

The calendar is useful for viewing all of the tasks for all of your transactions in a given week or day. Events on the calendar come from two sources: your task due dates and the key dates you set in the Transaction Details.

- A) Calendar Views: You may change your default calendar views in your Preferences. If you want to see an alternate view for, you may select a view from the “Views” menu on the right side of your screen (i.e. day view vs. weekly)
- B) Monthly View: The monthly view appears on the right side of the screen. Bold face calendar dates indicate activity due on that date. You may click on any date in the month to go to the activity for that week or day.
- C) Task Details: Details of any task can be displayed by clicking on the event.
- D) Schedule View: The “Create Printable Schedule” link under Actions on the right creates a pop-up window for a printable schedule of events for the current view.
- E) Viewing the Calendar Events: The subject of each task due displays on your calendar. You may hover your mouse over the task item to see a pop-up indicator displaying the address and buyer/borrower’s name for the transaction it is associated with.

- F) Adding New Calendar Events/Tasks: First, make sure your current transaction is the transaction that your new task is associated with. Under “Actions” on the right side of the screen, click the “New Task” link. Follow instructions in Step 4 for Creating Tasks.

- G) Marking Tasks Complete: Check the checkbox(es) beside the completed task(s). Next, click the “Mark Completed” link under Actions on the right. This action will remove the item from the Pending Tasks View of your Calendar, and direct you to a screen where you may select transaction members to be notified by email of the completion of the task.

- H) Deleting Calendar Events: You may check the box beside one or more calendar events in order to select them for deletion. Then, under Actions on the right side of the screen, click “Delete.”

➤ **Sending Orders**

An order is used for requesting services from a third party, regardless of whether they are invited to your SettlementRoom transactions. Orders post on the Open Items and Calendar tabs just like Tasks. Use the Orders tool to send the data and documents to a vendor, usually for an inspection, appraisal, or title/escrow.

- A) Entering a New Order: You may access the “New Order” link in the Actions menu on the Summary tab, the Calendar tab, or the Open Items tab.

- B) Order Content: You may type in an email address in the “Email To” field, or you may type in a fax number in the “Fax To” field. If your vendor has been entered on your Preloaded page under Preloaded Vendors, you may


select the vendor to send your order to using the “Vendors” drop-down menu. If you choose a vendor from the drop-down menu, the order will be delivered by email, fax or both, depending on the preferred delivery method that was indicated in the Preloaded vendor form.



Please note: You must use the Area Code when entering fax numbers in SettlementRoom. This will not incur long distance charges for you. It is simply necessary for our servers to be able to deliver your fax. Your vendor will receive a copy of the cover sheet used to fax documents to the transaction, and will thus be able to fax documents back to you in this way.

- C) Documents: Under the Documents heading, you will see a list of all of the documents that are posted to your transaction website. If you wish to attach a document(s) to be delivered to the vendor with your order, you may check the checkbox(es) next to the document(s) you wish to send.
- D) Subject: This is a required field, and this will be how your order will display on the Calendar, Open Items, and Summary Tabs.
- E) Message/Content: You may enter as much or as little text as you wish in this box to be attached with your order. If you send a standard message to your vendors with each order, SettlementRoom can save your message so that you will not need to retype it for each order. Simply click the “yes” radio button under the Message/Content box for, “Save this message for future requests.”
- F) Due Date: The due date will be posted on the calendar. You may indicate the date when the order must be completed.

- G) Adding Information: A list of the transaction details for the transaction will be listed. If you wish for this information to be included with your order, check the checkboxes next to each field that you wish to include.

- H) Attaching a File: If there is a file saved to your hard drive that you wish to include with the order, you may browse to that file and select it for attachment.
 Documents to be faxed must be supported file types, including .PDF and .DOC. A complete list of supported file types is available as a link at the bottom of the order form.

- I) Sending the Order: Click the “Send” button to send your order. If you wish to save the order to send at a later time, you may click “Save” at the bottom left.

➤ **Retiring Transactions**

When a transaction is retired, it is removed from your switching panel and other views in your account. Retired transactions will be DELETED from your account and our servers 30 days after being retired. Please make sure that you archive your transactions before or at the time of retiring.

- A) Click “Retire/Restore” on the main menu on the left for retiring and restoring options.

- B) To retire transactions, check the checkbox(es) next to each transaction you wish to retire. Then click the “Retire” link at the bottom of the page.

- C) To restore transactions, click the link “Click here if you wish to restore retired transactions.” On the following screen you may select the

transactions you wish to restore, and click the “Restore” button at the bottom of the screen.

➤ **Archiving Transactions**

For a nominal extra charge, you may request to download your transactions to your own computer, or to have them copied on CD and sent to you by mail. You may archive transactions which are still active, or transactions which have been retired but not yet deleted, at any time.

- A) Click “Buy Archives” on the left side of your screen.
- B) Select the transactions you wish to archive, and click “continue” at the bottom of the screen.
- C) On the next screen, first select the delivery option: CD or e-mail. For each transaction you select, you may also select the person for whom you are requesting the archive. The items that show on the archive will vary according to the viewing permissions of that user.
- D) Your archives will be delivered within about four hours if e-mail delivery is selected, and in about a week if CD is selected.

Getting Further Help

Have questions not addressed in this manual, or need clarification on something you’ve read? Feel free to contact SettlementRoom support in the method of your choice.