

HOME ABSTRACT & TITLE COMPANY

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Quick Reference Guide - Basic View



Step One - Login

Go to our home page
<http://www.homeabstract.com>

1. Click on SureClose link
2. Enter your User Name
3. Enter your Password
(provided to you via e-mail)



Tips:

- The first time you login, you will need to disable your pop-up blocker or hold the ctrl key down when clicking login
- Click the “forgot your password” link to have your user name and password e-mailed to you
- Click on “My Setup” to edit your personal profile
- SureClose works best with Internet Explorer

Step Two -

1. Your current files are displayed or click “switch to archived files” to view closed files
2. Narrow down your search by typing a partial address or file # in the Filter Displayed Files box
3. Click on the property address to open a file



Your file information will appear at the top of the screen

1. Property Address
2. Sale Price
3. File #
4. Start, Close date, and the file status



Step Two - File Access (Cont.)

Monitor the status of your file by reviewing the tasks that have been completed









Note: the completed time is in Pacific Standard

Completed Activities (click activity for more info)	
Activity	Completed
Preliminary HUD Prepared	01/04/2007 2:38:17 pm PST
Title Commitment Completed	01/04/2007 2:38:16 pm PST
Payoff(s) Received	01/04/2007 2:38:16 pm PST
HOA Received	01/04/2007 2:38:16 pm PST
Survey Received	01/04/2007 2:38:16 pm PST

View Documents for your transaction by clicking on the eyeglasses

Note: You must have Adobe Acrobat Reader to view documents

Print or save documents for future use

Documents (click on a document to view / edit)	
Name	Completed
PreClosing	
<input type="checkbox"/>  Map to the Office	
<input type="checkbox"/>  Wiring Instructions	
<input type="checkbox"/>  Privacy Policy	
<input type="checkbox"/>  Contract	
<input type="checkbox"/>  Survey	
<input type="checkbox"/>  Tax Certificate	
<input type="checkbox"/>  Title Commitment	
<input type="checkbox"/>  Preliminary HUD	

All messages sent out of SureClose will be saved in the file notes section.

1. View Contact Info by clicking on the contact name you wish to view
2. Send an E-mail by checking the box next to the contact(s) you wish to email
3. Click Send Message

File Notes (click subject to view entire message)		
Date	Subject	Created By
1/4/2007	RE: 1550 Austin Street / Ref #: 345678	Buzz, Demo

Contacts (click name for contact info)			
<input checked="" type="checkbox"/> Name	Company	Role	
<input type="checkbox"/> Assistant Annie	Region B Training Site	Escrow Assistant	
<input checked="" type="checkbox"/> Camie Madden	Region B Training Site	Buyer/Borrower	1
<input type="checkbox"/> Demo Buzz	Stewart Title Guaranty	Builder	2
<input type="checkbox"/> Escrow Annie	Region B Training Site	Escrow Officer	
<input type="checkbox"/> STCRegionB Admin	Region B Training Site	Account Manager	

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1. Attach a Document to your email by checking the box next to attach documents
2. Select the document(s) you would like to attach
3. Click Send Message

New Message		Cancel
To:	Camie Madden	
Cc:		
<small>(use ; or a space to separate multiple e-mail addresses.)</small>		
Subject:	RE: 1550 Austin Street / Ref #: 345678	
Message:		
File # 345678		
Please review the attached documents.		
<input checked="" type="checkbox"/> Attach documents	3	<input type="button" value="Send Message"/>
Documents		Completed
PreClosing		
<input type="checkbox"/>	Map to the Office	
<input type="checkbox"/>	Wiring Instructions	
<input type="checkbox"/>	Privacy Policy	
<input type="checkbox"/>	Contract	2
<input checked="" type="checkbox"/>	Survey	

Tips:

- Click on “My Files” to return to your current file list
- Click on an activity to get more detail (if available)
- You can download Adobe Acrobat Reader at www.adobe.com
- Your file will be available on SureClose for a minimum of 2 years
- Real Estate agents are able to view the contact information only for their own client(s)