

2. Closing Portal Registration

Follow these steps to register for the Closing Portal:

1. [1. Create a User Account \(Username and Password\)](#)
2. [2. Validate Email Address](#)
3. [3. Activate User Account \(Select Location ID\)](#)
4. [4. Approve the Location \(PSG\)](#)
5. [FAQs](#)
 - 5.1. [Q: How do I retrieve my username?](#)
 - 5.2. [Q: What if I lost my validation email?](#)
 - 5.3. [Q: How do I retrieve my password?](#)

Start: Go to www.realmanage.com and click on "Closing Portal"

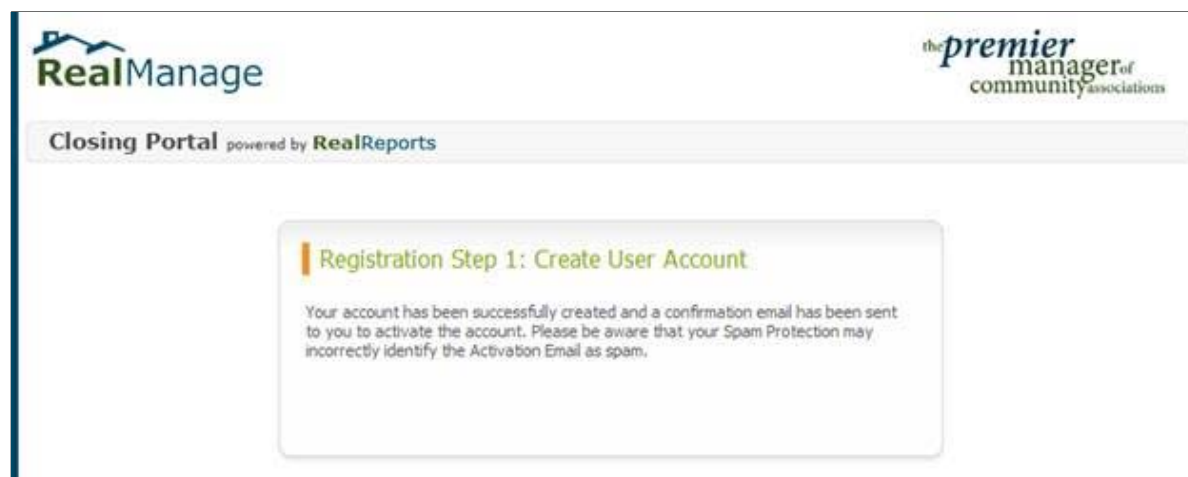
1. Create a User Account (Username and Password)

Enter the information requested in the following screen:

The screenshot shows the 'Closing Portal' registration interface. At the top left is the 'RealManage' logo, and at the top right is the logo for 'the premier manager of community associations'. Below these is a banner that reads 'Closing Portal powered by RealReports'. The main content area is titled 'Registration Step 1: Create User Account'. It contains a form with the following fields: 'User Name', 'Password', 'Confirm Password', 'E-mail', 'Confirm E-mail', 'Security Question' (a dropdown menu with 'Make of your first car?' selected), and 'Security Answer'. A 'Create User' button is located at the bottom right of the form. At the bottom of the page, there is a copyright notice: '© 2004 - 2008 RealManage LLC. All rights reserved.'

When you complete this step, you will see the following screen informing you that the account was successfully created:

successfully created.

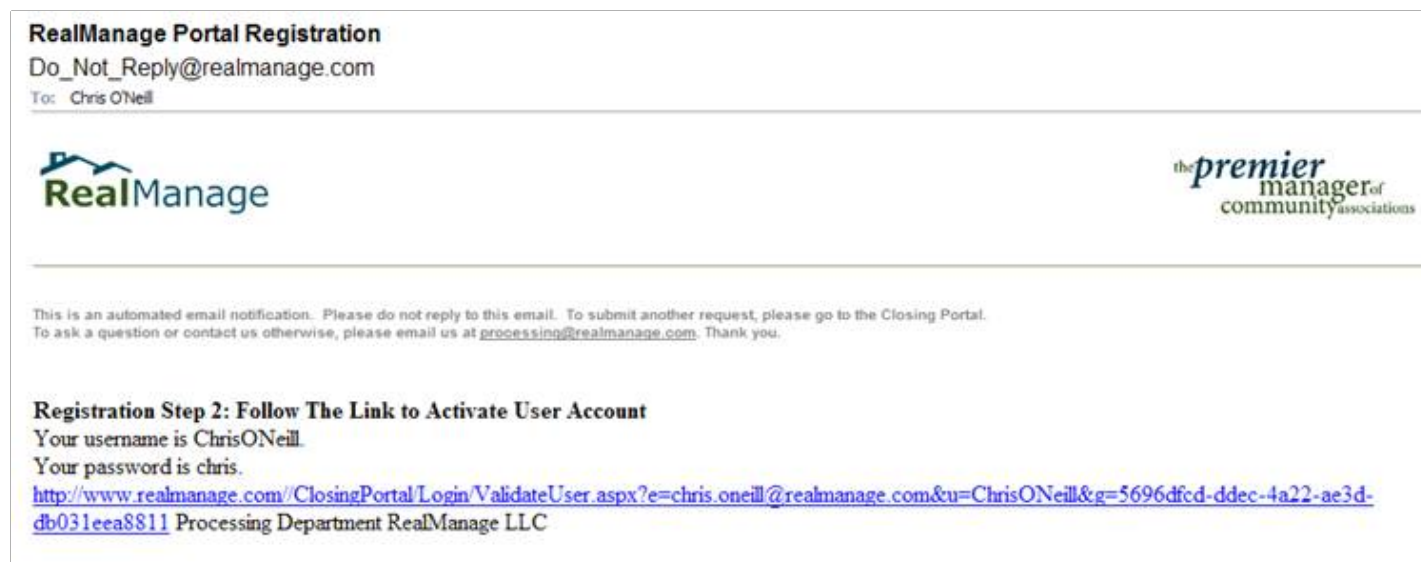


The screenshot shows the RealManage Closing Portal interface. At the top left is the RealManage logo, and at the top right is the logo for 'the premier manager of community associations'. Below the logos is a header bar that says 'Closing Portal powered by RealReports'. The main content area features a box titled 'Registration Step 1: Create User Account' with a green vertical bar on the left. The text inside the box reads: 'Your account has been successfully created and a confirmation email has been sent to you to activate the account. Please be aware that your Spam Protection may incorrectly identify the Activation Email as spam.'

2. Validate Email Address

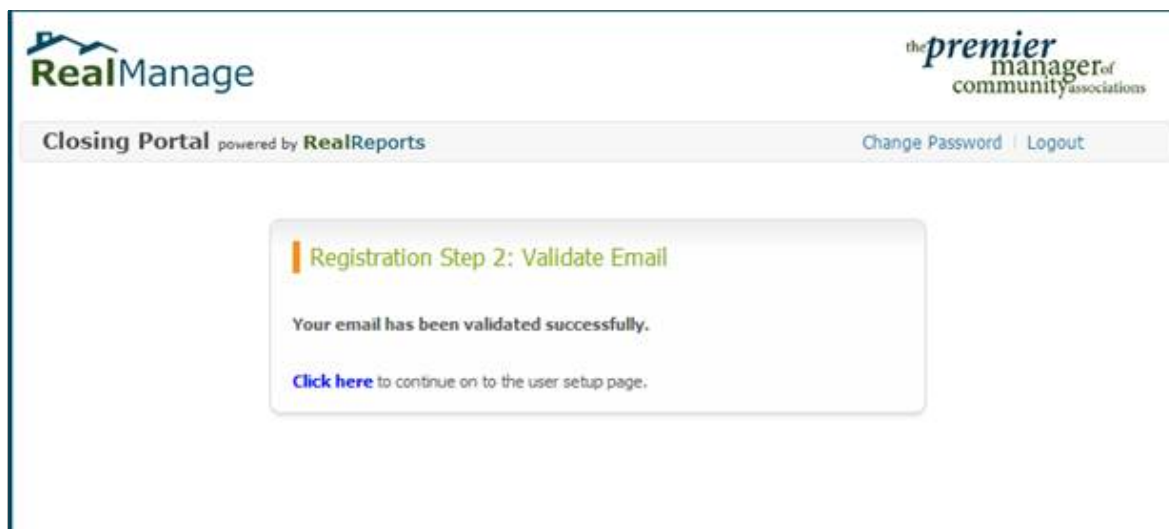
The system sends an email similar to the one below to the email address you entered. The email contains the username, password, and a **link that must be clicked** to validate the new account.

Note: Many problems with registration can be traced to failure to either receive the email at all or to click the link. If you do not see the email within a minute or so of registering, check your junk mail folder.



The screenshot shows an email notification from RealManage. The header includes the subject 'RealManage Portal Registration', the sender 'Do_Not_Reply@realmanage.com', and the recipient 'To: Chris O'Neill'. Below the header is the RealManage logo and the 'the premier manager of community associations' logo. A horizontal line separates the header from the body. The body text reads: 'This is an automated email notification. Please do not reply to this email. To submit another request, please go to the Closing Portal. To ask a question or contact us otherwise, please email us at processing@realmanage.com. Thank you.' Below this is a section titled 'Registration Step 2: Follow The Link to Activate User Account' which provides the username 'ChrisO'Neill', the password 'chris', and a long URL for validation: <http://www.realmanage.com/ClosingPortal/Login/ValidateUser.aspx?e=chris.oneill@realmanage.com&u=ChrisO'Neill&g=5696dfcd-ddec-4a22-ae3d-db031eea8811>. The email concludes with 'Processing Department RealManage LLC'.

To validate the email address, access the email shown above and click on the link. This brings you to the following screen:

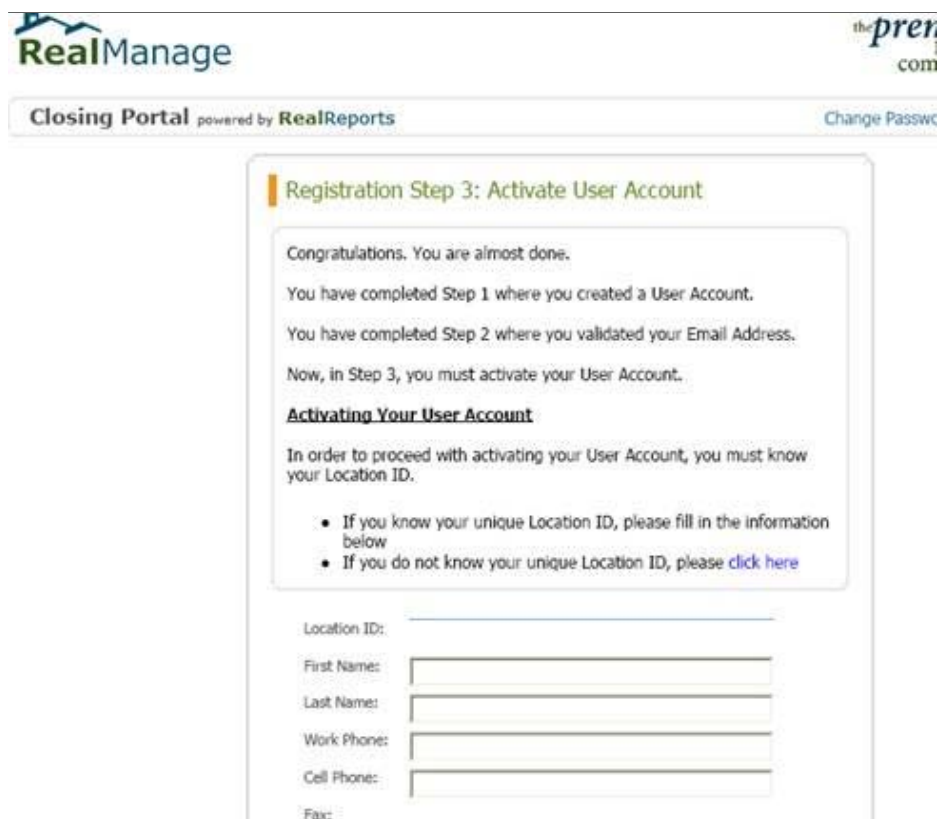


The screenshot shows the RealManage Closing Portal interface. At the top left is the RealManage logo. At the top right is the logo for 'the premier manager of community associations'. Below the logos is a navigation bar with 'Closing Portal powered by RealReports' on the left and 'Change Password | Logout' on the right. The main content area features a box titled 'Registration Step 2: Validate Email'. Inside this box, it says 'Your email has been validated successfully.' and 'Click here to continue on to the user setup page.'

Continue to step 3.

3. Activate User Account (Select Location ID)

In this step, the title agent must select a Location ID. This is a unique ID created for each title company office. Any title agent that logs in may access records from any other agent *in that same office*. This facilitates office collaboration in case the person who requested the documents is away. On-screen help text is provided.



The screenshot shows the RealManage Closing Portal interface for 'Registration Step 3: Activate User Account'. At the top left is the RealManage logo. At the top right is the logo for 'the premier manager of community associations'. Below the logos is a navigation bar with 'Closing Portal powered by RealReports' on the left and 'Change Password' on the right. The main content area features a box titled 'Registration Step 3: Activate User Account'. Inside this box, it says 'Congratulations. You are almost done.' and 'You have completed Step 1 where you created a User Account. You have completed Step 2 where you validated your Email Address. Now, in Step 3, you must activate your User Account.' Below this is a section titled 'Activating Your User Account' with the text 'In order to proceed with activating your User Account, you must know your Location ID.' and a bulleted list: '• If you know your unique Location ID, please fill in the information below' and '• If you do not know your unique Location ID, please click here'. At the bottom of the box are input fields for 'Location ID:', 'First Name:', 'Last Name:', 'Work Phone:', 'Cell Phone:', and 'Fax:'.

Help Text:

Account Overview: Access to the RealManage Closing Portal is based on your "User Account," your "Location Account," and your "Company Account."

Once set up and activated, a single Company Account (such as that for "DHI Title" for example) may have multiple Location Accounts associated with it (i.e. each physical office location will have a separate Location Account), and each Location Account may have multiple User Accounts associated with it (i.e. Users will specify which office they work at).


User Account: Your "User Account" is unique to you and is comprised of your User Name, password, and email address.

Location Account: Your "Location Account" is shared by you and all the co-workers in your physical office location.

A Location Account is comprised of your Company's Name, Location Address (i.e. your office address), and Location ID.

All Users who share the same Location Account (i.e. share the same Location ID) have the option of working together on the RealManage Closing Portal -- requesting, seeing and retrieving each other's settlement documents.

If you do not know the Location ID, click the link just above the information fields. This brings you to the following screen:



the *premier*
manager of
community associations

Closing Portal powered by RealReports
Change Password | Logout

Location ID

If you are unable to find your Location in the dropdown below, then [click here](#) to register a new location

Please select your company/location:

Arlington TX / 1251 W Green Oaks Blvd # 130

If the location has already been entered, it will appear in the drop down box. Once you select the location, this screen will appear:

Location ID

The following colleagues have already registered for this location. To register yourself for the same location please use the Location ID shown below.

Location ID: 9242cfb28b

Karen Salmon	ksalmon@phmsw.com
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Write down the Location ID shown above and then [Click Here](#).

If you must come back later, when you are ready log in to the Closing Portal using your User ID and User Password, and follow the steps.

When you click on the link to continue, the Location ID will be auto-populated.

your Location ID.

- If you know your unique Location ID, please fill in the information below
- If you do not know your unique Location ID, please [click here](#)

Location ID:

First Name:

Last Name:

Work Phone:

Cell Phone:

If the location has NOT been entered, click the link to register a new location. This brings you to the Create Location Account screen. Enter all the information.

Create Location Account

Company Name:

Company Type:

Location Address:

First Name:

Last Name:

Work Phone:

Cell Phone:

Fax:

Help Text:
When entering a Location Address, you must enter a valid mailing address including a

If you enter an address that already exists in the system, or if you enter the phone number in an invalid format, you will get an error like one of these below.

Create Location Account

Company Name:

Company Type:

Location Address:

This address has already been registered.

[Click here](#) to find out your Location ID, if you do not know your Location ID, or do not know if someone from your office has already registered your Location.

First Name:

Last Name:

Work Phone: *invalid: (xxx)xxx-xxxx*

Cell Phone:

Fax:

Help Text:

When entering a Location Address, you must enter a valid mailing address including a valid street address or PO Box, followed by City, State and Zip code. For example:

P.O. Box 803555
Dallas, TX 75380

Location Account: Your "Location Account" is shared by you and all the co-workers in your physical office location.

A Location Account is comprised of your Company's Name, Location Address (i.e. your office address), and Location ID.

All Users who share the same Location Account (i.e. share the same Location ID) have the option of working together on the RealManage Closing Portal -- requesting, seeing and retrieving each other's settlement documents.

Create Location Account

Company Name:

Company Type:

Location Address:

First Name:

Last Name:

Work Phone: *invalid: (xxx)xxx-xxxx*

Cell Phone:

Fax:

Help Text:

When entering a Location Address, you must enter a valid mailing address including a valid street address or PO Box, followed by City, State and Zip code. For example:

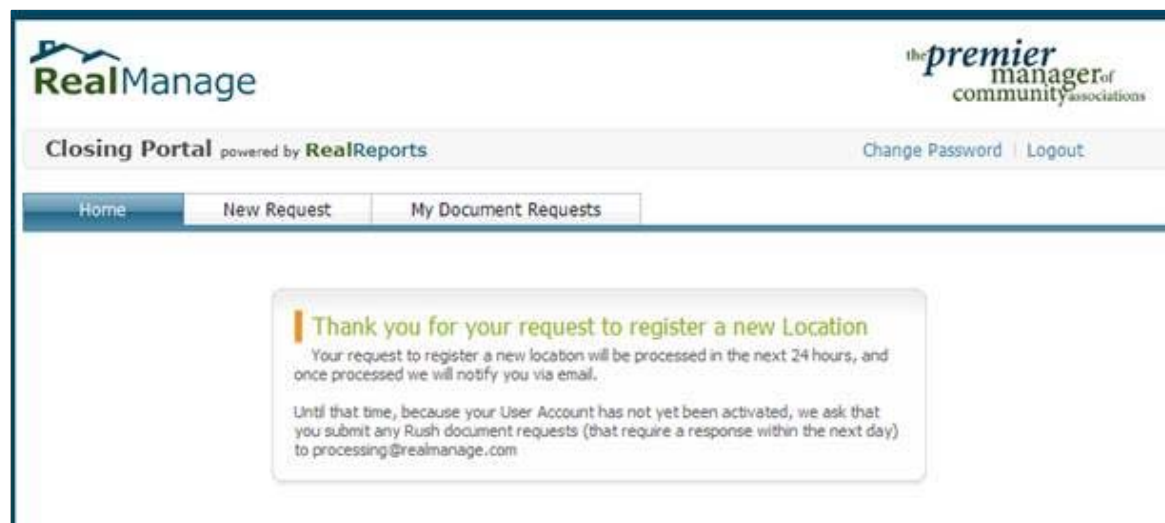
P.O. Box 803555
Dallas, TX 75380

Location Account: Your "Location Account" is shared by you and all the co-workers in your physical office location.

A Location Account is comprised of your Company's Name, Location Address (i.e. your office address), and Location ID.

All Users who share the same Location Account (i.e. share the same Location ID) have the option of working together on the RealManage Closing Portal -- requesting, seeing and retrieving each other's settlement documents.

Once the information is correctly entered, click "Create Location," and you will see the following message:



The screenshot displays the RealManage web interface. At the top left is the RealManage logo, and at the top right is the logo for 'the premier manager of community associations'. Below the logos is a navigation bar with 'Closing Portal powered by RealReports' on the left and 'Change Password | Logout' on the right. A secondary navigation bar contains three buttons: 'Home', 'New Request', and 'My Document Requests'. The main content area features a message box with the following text:

Thank you for your request to register a new Location
Your request to register a new location will be processed in the next 24 hours, and once processed we will notify you via email.

Until that time, because your User Account has not yet been activated, we ask that you submit any Rush document requests (that require a response within the next day) to processing@realmanage.com