SureClose® Product Line

Transaction Summary Report

September 24, 2010

propertyinfo

Technology provided by PropertyInfo Corporation, a Stewart company.

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Overview

This document contains information about the set up and use of the Transaction Summary Report. This report replaces the previous, Weekly Summary Report.

About the Transaction Summary Report

The Transaction Summary Report, formerly known as the Weekly Summary Report provides a quick look at tasks and documents completed within the last seven days. The report also includes general transaction information such as property address, file start and closing dates, sale price and file number, as well as, comments, contact information and a link to log in to view your transaction.

Note

Eligible files include **Closing** files with an *Open* status, and **Listing** files with an *Active* status.

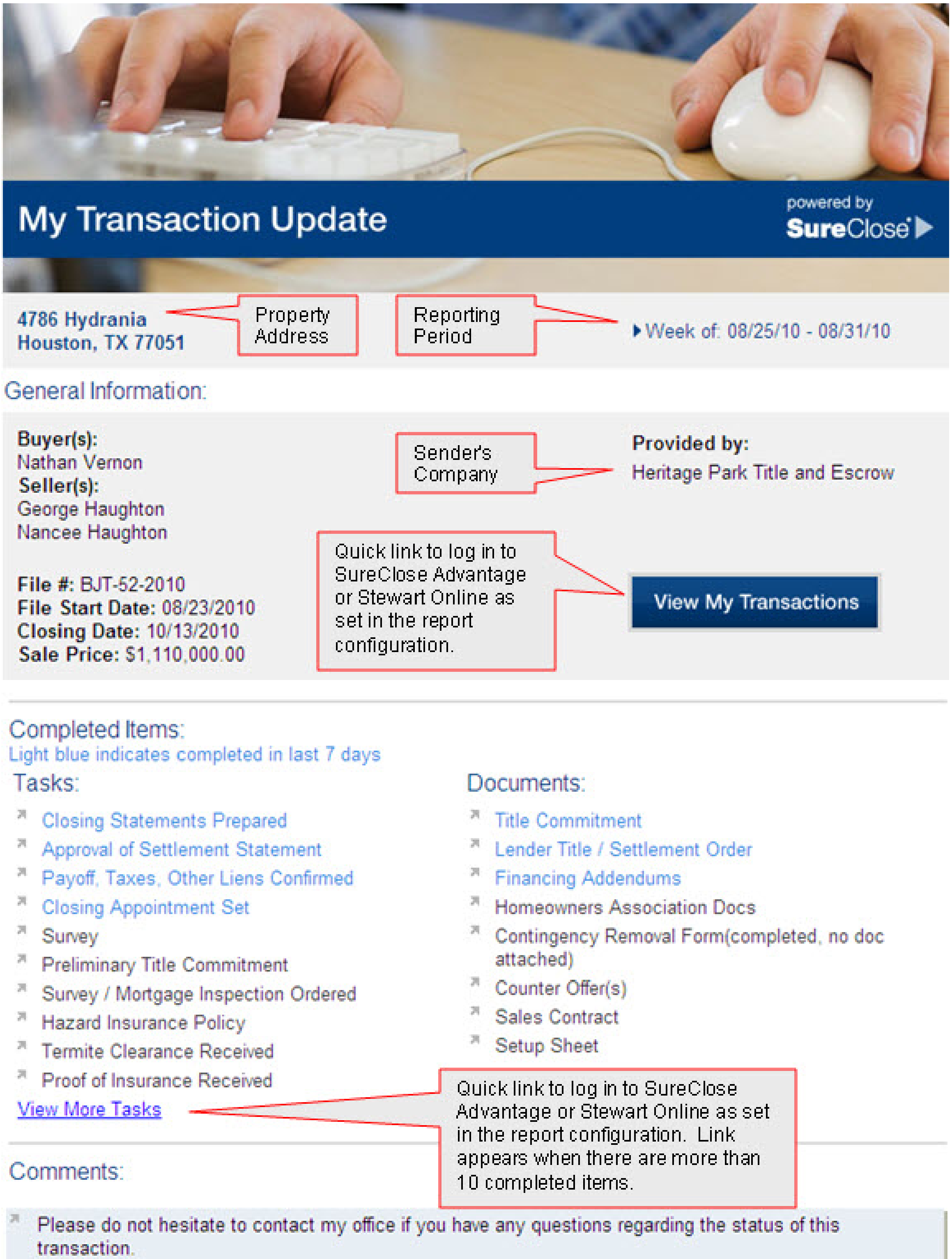
Configuring the Report

In order to receive this report, you must be a party on the file and designated as a recipient when the report is configured. For more information, refer to *Configuring the Report*.

Customizing the Report

Certain features of the report are customizable; for example, you can determine who the sender and recipient will be, and include their photos. You can also choose to include comments and determine which recipients will receive them. For more information, refer to *Adding Comments to the Report*.

Sample Report



My Transaction Update

powered by SureClose

4786 Hydrania
Houston, TX 77051

Property Address

Reporting Period

Week of: 08/25/10 - 08/31/10

General Information:

Buyer(s):
Nathan Vernon
Seller(s):
George Haughton
Nancee Haughton

File #: BJT-52-2010
File Start Date: 08/23/2010
Closing Date: 10/13/2010
Sale Price: $1,110,000.00

Sender's Company

Provided by:
Heritage Park Title and Escrow

Quick link to log in to SureClose Advantage or Stewart Online as set in the report configuration.

View My Transactions

Completed Items:
Light blue indicates completed in last 7 days

Tasks:

- Closing Statements Prepared
- Approval of Settlement Statement
- Payoff, Taxes, Other Liens Confirmed
- Closing Appointment Set
- Survey
- Preliminary Title Commitment
- Survey / Mortgage Inspection Ordered
- Hazard Insurance Policy
- Termite Clearance Received
- Proof of Insurance Received

View More Tasks

Documents:

- Title Commitment
- Lender Title / Settlement Order
- Financing Addendums
- Homeowners Association Docs
- Contingency Removal Form(completed, no doc attached)
- Counter Offer(s)
- Sales Contract
- Setup Sheet

Quick link to log in to SureClose Advantage or Stewart Online as set in the report configuration. Link appears when there are more than 10 completed items.

Comments:

Please do not hesitate to contact my office if you have any questions regarding the status of this transaction.

Hyperlink to message contact.

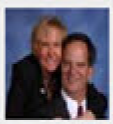
My Transactions Contacts:

Name (Role)	Email	Phone
Nathan Vernon (Buyer/Borrower)	nathanv@hotmail.com	(214)568-9411
Nancee Haughton (Seller)	No email available	No phone available
George Haughton (Seller)	No email available	No phone available
Haley Maxwell (Selling Agent)	haley@harber-king.com	(214)565-8744
Shannon Stockton (Site Admin)	shannon@heritagepark.com	(281)547-9511
Vicki Childress (Site Admin)	vchildre@stewart.com	(713)524-9601
Jake Armstrong (Transaction Manager)	jakearmstrong@gmail.com	(713)246-9523

Sender in the report configuration.

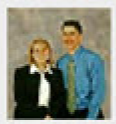
Recipient in the report configuration.

Sender:



Shannon Stockton
Heritage Park Title and Escrow
shannon@heritagepark.com
(281)547-9500

Prepared For:



Haley Maxwell
Harber- King & Associates
haley@harber-king.com
(214)565-8744

supports the green initiative

Configuring the Report

Before the report can be automatically sent to parties on the file, it must be configured in SureClose Advantage. As part of the configuration, you determine which party on the file will be the sender, who will receive the report and which system the report will be viewed in: *SureClose Advantage* or *Stewart Online*.

Steps

Complete these steps to configure the report.

1. On the navigation pane, click **Files**. Recent Files display at the top of the navigation pane.
2. From the Recent Files list, select the file you want to configure the report for. If the file is not listed, then search for the file. The File Summary page displays.
3. On the File Details header, click **Show**.
4. Under **Notifications and Reminders**, select the **Transaction Summary Report** check box. The Transaction Summary Report Configuration window displays.
5. Complete the following:

   Available Parties—From the Available Parties list, select which party will send and which will receive the report. Parties are listed with their company name, in alphabetical order, along with their designated roles.

   Sender *—Mark the radio button next to the party name who will send the report.

   Recipients *—Select the check box next to the name of the party or parties who will receive the report. The party's email address is also listed. If the party has more than one email address listed, then click the drop-down arrow to select the email address to send the report to. If the party does not have an email address, but is allowed to log in, then the report is sent to their mysureclose.com email address.

   Note

   When the report is generated, each recipient is sent a custom report. Each report displays up to 10 completed tasks and 10 completed documents the recipient has permission to view, as well as, any custom comments the sender chooses to include. If more than 10 completed tasks or documents exist, then a View More link displays. Click the link to log in and view the transaction.

   View Transactions in—Select the system the transactions will be viewed in; by default, SureClose Advantage is selected.

6. *To save the configuration settings*, click **Save** within the Transaction Summary Report Configuration window, then to *save changes on the file*, click **Save** on the File Summary page.

   Note

   Saving the configuration settings displays the link, **Configure Transaction Summary Report**. Click this link to make any future configuration changes.

Adding Comments to the Report

Add customized comments to the Transaction Summary Report by creating a **Weekly Summary Report Comments** task. All comments display in the Comments section of the report. Determine who sees the comments by setting party permissions on the task.

Note

The task name is not case-sensitive but must be spelled correctly.

Steps

Complete these steps to add comments to the report.

1. On the navigation pane, click **Files**. **Recent Files** display at the top of the navigation pane.
2. From **Recent Files**, click the file you want to work with. If needed, search for the file.
3. With the file selected, click **Tasks**.
4. From the menu bar, select **Add**.
5. Add a new task named, **Weekly Summary Report Comments**.
6. On the **Notes** tab, add a note to the task. The note text displays on the report as comments.
7. On the **Permissions** tab, grant task permissions to determine who will see the comments on the report. Parties with permissions other than *No Access* can see the comment on the report.
8. When finished, click **Save**.

Tip

You can add multiple notes to the comments task. Multiple notes appear as separate items under the comments section of the report and can be viewed by parties granted permissions other than *No Access*.

Generating the Report

With the required configuration complete, the Transaction Summary Report is automatically generated once a week, each Wednesday at 9:00PM Central Standard Time. When the report is generated, it is sent to each recipient designated in the configuration at the email address specified.

Cancelling the Report

Once configured, the Transaction Summary Report is automatically generated and distributed each week. If needed, the automatic report generation and distribution can be cancelled and stopped. You can cancel the report for the file, or for a recipient on a file.

Cancelling the Report for a File

Steps

Complete these steps to cancel the report for a file.

1. From the Recent Files list, select the file you want to work with. The File Summary page displays.
2. To cancel the report for the file, you can:
   - **Change the file status**—For a Closing file, change the file status to anything other than Open. For a Listing file, change the file status to anything other than Active.

     - OR -
   - Clear the **Transaction Summary Repor**t check box.
3. When finished, click **Save**.

Cancelling the Report for a Recipient on a File

Steps

Complete these steps to cancel the report for a recipient on a file.

1. From the Recent Files list, select the file you want to work with. The File Summary page displays.
2. Click the **Configure the Transaction Summary Report** check box. A configuration window displays.
3. From the list, locate the recipient you want to stop sending the report to.
4. To cancel the report for a recipient on the file, you can:
   - Clear the check box next to the recipient name.

     - OR -
   - Delete the party from the file.
5. *To save the configuration settings*, click **Save** within the Transaction Summary Report configuration window, then *to save changes on the file*, click **Save** on the File Summary page.