RA-CONNECT: Abridged User Guide For Fund Members

This guide is your shortcut to some commonly performed RA-Connect℠ tasks.

MESSAGES + NOTES

Used to communicate with your clients about the transaction.

1. Click on the + sign to expand the feature.
2. Decide whether you want to send an e-mail or just place a note on the file; click on the respective link.
3. Type the text in the message area.
4. For e-mails, place a check mark in the appropriate e-mail address boxes listed or add additional e-mail addresses in the "Additional E-mail Recipients" area and click the Send button. For notes, don't include any e-mail addresses and just click the Save button to save the note to the file.
5. You may also want to permanently add e-mail addresses to this transaction by using the link "Assign Contacts to Transaction." You can select which addresses from the e-mail address book are to be added to the transaction.

ASSOCIATED DOCUMENTS

Used to upload and view documents added to the transaction. Document types allowed = PDF, Word, WordPerfect,® TIFF and JPEGs.

1. Click on the + sign to expand the feature.
2. Click on the "Upload a Document" button.
3. In the description field, type the name of the document you are uploading.
4. Use the "Browse" button to open up your Windows® Internet Explorer ® and browse to the file you wish to upload.
5. Identify the file type "Closing Document or Unspecified."
6. Place a check mark in the box indicating who else has rights to view this document.
7. Place a check mark in the box indicating automatic notification to the Requestor (your lender/broker client) of the uploaded document.
8. Click "Upload File" button.
9. You will get a confirmation of the success of the upload and then an option to return to the transaction.

TRACKING ITEMS

Used to keep track of the various closing items you have added to the Tracking List feature under Account Administration.

1. Click on the + sign to expand the feature.
2. Use the Due Date field to enter date when item is due.
3. Use the Tracking Notes area to type short notes about tracked item.
4. Put a check mark in the "Show Requestor" box on those tracked items you wish to enable your Requestor to view.
5. Place a check mark in the Completed/Received box to identify that a tracked item has been received or completed.
6. Make sure to click the "Submit All Changes" button to save any changes.

PUBLIC ACCESS PIN CODE

Used to assign a "login" PIN number or code for the Buyer or Seller which allows them the ability to log in and see the status of their file through RA-Connect.

1. Click on the + sign to expand the feature.
2. Type a PIN code (alpha, numeric or combination of both) in the Buyer or Seller Code field.
3. Use the Public Notes area for notes you may wish to convey to the Buyer or Seller.
4. Make sure to click the "Submit All Changes" button to save changes.
5. Your Buyer or Seller client can log into RA-Connect at the login screen (bottom portion of login area) using the PIN code and the transaction ID number of the transaction. (Transaction ID numbers are provided automatically by the system.)

CLOSE THIS TRANSACTION

Used to place an active file into the closed/cancelled list.

1. Click on the + sign to expand the feature.
2. Choose Closed/Completed or Cancelled.
3. Complete the information requested.
4. Click "Close Transaction" button.
5. Any closed transaction can be reactivated by editing the transaction and choosing "reactivate transaction" from the top of the file.

DOUBLETIME® (DT)

Used to import RA-Connect transactions into DoubleTime (one direction import only—RA to DT).

1. In DoubleTime you must set up the connection between DT and RA-Connect in the User Preference area.
2. Once connection is established, go to File on menu bar.
3. Choose Import file from Internet.
4. Click the GO button to list RA-Connect transactions.
5. Select/Highlight the transaction to be imported – click OK.
6. Establish a DT file ID.
7. Import window opens to display data being imported.
8. Click the "Save" button on the tool bar to save this info into DT.
9. Very general data imported, i.e., buyer name, address, property, loan and purchase price.

Need further assistance? Click on the Help tab in your account or download the complete User Guide from the Account Administrator portion of the program.