



RAPID User Guide for Customers
Administration Section

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1. Administration Module Overview

The Administration module is designed to allow for the management and maintenance of *RAPID* users. The Administration module has a hierarchical structure where Companies are set up as parent companies and have the ability to add children, branch/locations. A parent company is either the only physical location for a customer or each of the children, branch/locations, are set up under the umbrella of the parent company. (Example: National Bank is the parent, main location, and North, South, East, West are children, branch/locations.) It is possible within this structure that no transactions (orders) are actually generated from the parent company and it simply acts as an administration and reporting agency.

Security rights and screens differ between parent and child administrators. Parent administrators are granted more rights than child administrators, therefore they have the ability to perform more management functions, not only for their own login but any of their child logins.

The Administration module allows for the addition of users to *RAPID*, administration of their passwords, email addresses, phone numbers, and security information. The security rights of a new user when added to *RAPID* are defaulted to View Only.

The module also allows for the administration of their branch/location access. A user can have access to multiple branch/locations. Security rights within each branch/location are determined either by the Parent administrator or the Child administrator for the applicable branch/location (i.e. the East branch/location administrator cannot grant access nor change security rights for a user in another branch/location.). The parent administrator can grant or change access for any user.

Each *RAPID* user must be assigned a default branch/location. The branch/location they are initially added to is their default. In order to place orders at other locations the user must be allowed to place orders in their default branch/location and then be granted the right to add orders at each subsequent branch/location. Default branch/locations for a user can only be changed by the Parent administrator.

Each user has a *RAPID* status of Active or Inactive. If a user is Inactive they cannot access the parent or any location/branch within *RAPID*. This status can only be changed by the Parent administrator or the default branch/location administrator.

Branch/locations cannot be removed from *RAPID* by either the parent or child administrator. *RAPID* should be contacted to remove branch/locations.

2. Terms Definitions

Administrator - A user with rights to the Administration module.

Child - Branch/location created by and overseen by a Parent. A Child has its own Party ID in the *RAPID* database. This enables reporting to be done at a Child level and Provider billing at either the parent or child level.

Child Administrator - A user at a Child location with rights to the Administration module.

Default Administrator - A Parent or Child Administrator. A Default Administrator is the Administrator for users whose default branch/location is the same as the Administrator's. Please see Appendix A for functional differences between a Child, Default, and Parent Administrator.

Default Branch/Location - The branch/location selected as that user's main location.

Parent - A company at the top of the hierarchical structure. Oversees any children created under this Party ID. This enables reporting for all Children under the Parent company and billing at either the parent or child level.

Parent Administrator - A user at the Parent location with rights to the Administration module.

Product - Specific type of product or service involved in the *RAPID* transaction, such as Drive-By, Commitment/Preliminary Report, Basic Certificate, Sub Escrow & Three-in-merge File. Products are found within Product Types.

Product Type - Type of product or service involved in the *RAPID* transaction, such as Appraisal, Closing, Credit, Document Services, Flood, Title & Valuations.

Provider - The term Provider refers to a company associated with the *RAPID* Exchange for the purpose of offering real estate related products to Customers. Examples of *RAPID* Providers include Title Agents, Appraisers, Credit Agencies, Home Inspectors, and Closing Agents.

User - An individual person logged onto the *RAPID* site.

3. Administration

The screenshot shows a web interface for 'Order Products'. At the top, there is a navigation bar with buttons for SEARCH, DATA UPLOAD, DOCUMENTS, TURN TIME, EXPRESS ORDER, ADMINISTRATION, and LOGOUT. An arrow points to the ADMINISTRATION button. Below the navigation bar, the page title 'Order Products' is displayed. The main content area includes fields for Buyer/Borrower, Seller/Owner, Property, and Loan #, along with a Transaction# field set to '[New]'. A 'Transaction Type' dropdown menu is also present. Below this, there are two sections: 'Available Products' and 'Ordered Products'. The 'Available Products' section lists eight categories: Appraisal, Automated Valuations, Business Credit, Closing, Consumer Credit, Document Services, Flood, and Title, each represented by a folder icon. The 'Ordered Products' section currently shows '[None]'. At the bottom of the page, there is a 'CANCEL' button.

The [Administration pages](#) are accessed by clicking on the [Administration button](#) located at the top of the [Order Products page](#). This button is only viewed if the user account includes [Administration Rights](#). Clicking the Administration button takes the user to the [Current Information page](#).

4. Current Information

[EDIT COMPANY](#) [EDIT USERS](#) [PRODUCTS / PROVIDERS](#) [EXIT ADMIN](#)

Current Information

Main Address

Southwest Bank
Company ID: 196360
3215 California Street
Suite 100
Tustin, CA 92680

Contact: John S Franklin
Contact Phone: (800) 958-8478
Contact Fax: (800) 558-4587
Contact Email: John@Southwest.com

Branch/Location Information

Location	City, State	<input type="radio"/> ADD BRANCH / LOCATION
Northwest Bank ID: 204280	San Bernardino, CA	<input type="radio"/> EDIT BRANCH / LOCATION <input type="radio"/> EDIT BRANCH / LOCATION USERS

The [Current Information page](#) is the main page of the Administration module. Logging in as a Parent Administrator, it displays the Company's Main Address and Branch/Location Information. Logging in as a Child Administrator, it displays the Branch/Location's Main Address. The user can access other pages from the [Current Information page](#) by clicking one of the following buttons:

- ❑ [Edit Company button](#): if the user wants to add/edit Company Information, such as Company name, address, contact information, billing address and billing contact, click the [Edit Company button](#). (Refer to section 4.1 Edit Company)
- ❑ [Edit Company Users button](#): if the user wants to add/edit User Information, such as usernames, passwords, active/inactive status, email addresses, phone numbers, security rights and default branch location, click the [Edit Company Users button](#). (Refer to section 4.2 Edit Company Users)
- ❑ [Products/Providers button](#): if the user wants to add/edit Product or Provider Information, such as the types of Products available to order, the Providers available from which to order specific products, and default products and Providers for a specific Product Type. (Refer to section 4.3 Products/Providers)
- ❑ [Exit Admin button](#): if the user wants to exit the Administration module, click [Exit Admin](#) and this takes the user back to the [Service Search page](#).

- *Add Branch/Location button*: if the user wants to add a new branch/location, click the *Add Branch/Location button* to enter information such as Company name, address, contact information, billing address and billing contact. (Refer to section 4.4 Add Branch/Location)
 - *Note*: The Add Branch/Location function is only available to the Parent Administrator.
- *Edit Branch/Location button*: if the user wants to edit an existing Branch/Location's Information, such as Company name, address, contact information, billing address and billing contact, click the *Edit Branch/Location button* to the right of the associated branch/location name. (Refer to section 4.5 Edit Branch/Location)
 - *Note*: The Edit Branch/Location function is only available to the Parent Administrator.
- *Edit Branch/Location Users button*: if the user wants to add/edit an existing Branch/Location's User Information, such as usernames, passwords, active/inactive status, email addresses, phone numbers, security rights and default branch/location, click the *Edit Branch/Location Users button*. (Refer to section 4.6 Edit Branch/Location Users)
 - *Note*: The Edit Branch/Location Users function is only available to the Parent Administrator.

4.1 Edit Company

ADMIN MAIN EXIT ADMIN

Southwest Bank Company Information

Required information is indicated by ◆

Name: ◆

Address Line 1 ◆ Address Line 2

City ◆ State ◆ Zip ◆

Phone ◆ Fax

Contact

First	MI	Last
Name: <input type="text" value="John"/> ◆	<input type="text" value="S"/>	<input type="text" value="Franklin"/> ◆
Phone <input type="text" value="(800) 958-8478"/> ◆		Fax <input type="text" value="(800) 558-4587"/>
Email <input type="text" value="John@Southwest.com"/> ◆		

Clicking the [Edit Company button](#) located on the [Current Information page](#) accesses this page and allows the user to Add/Edit Company Information.

The [Company Information](#) section at the top of the page allows the user to enter the Company Information. The [Company Information](#) area contains the following fields:

- [Name](#): the name of the Company.
- [Address Line 1](#): the street address of the Company.
- [Address Line 2](#): the street address of the Company.
- [City](#): the city in which the Company is located.
- [State](#): the state in which the Company is located.
- [Zip](#): the zip code in which the Company is located.
- [Phone](#): the phone number of the Company.
- [Fax](#): the fax number of the Company.
- [Contact's First Name](#): the first name of the contact for the Company.
- [Contact's Middle Initial](#): the middle initial of the contact for the Company.
- [Contact's Last Name](#): the last name of the contact for the Company.
- [Contact's Phone](#): the phone number of the contact for the Company.
- [Contact's Fax](#): the fax number of the contact for the Company.
- [Contact's Email Address](#): the email address for the contact for the Company.

Please note the buttons located throughout the page:

- ❑ *Admin Main button*: if the user wants to return to the *Current Information page*, click the *Admin Main button*.
- ❑ *Exit Admin button*: if the user wants to exit the Administration module, click *Exit Admin* and this takes the user back to the *Service Search page*.
- ❑ *Back button*: if the user wants to move to the previous page, click the *Back button*.
- ❑ *Reset button*: if the user wants to change all of the information back to what it was originally, click the *Reset button*.
- ❑ *Update button*: if the user has made all the changes they wish to make, click the *Update button* to update the page and save any changes that had been made.

4.2 Edit Company Users

Modify	Active	Username	First Name	Last Name	E-Mail	Phone	Default Location	Add/Edit Orders	View Orders	Reports	Admin	Remove
<input type="radio"/> MODIFY	<input checked="" type="checkbox"/>	sherni2			Sherni@Southwest.com	(800) 656-6541	Southwest Bank	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="radio"/> MODIFY	<input checked="" type="checkbox"/>	Steve2	Steve	Sellers	Steve@Southwest.com	(800) 625-8478	Southwest Bank	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Clicking the [Edit Company Users button](#) located on the [Current Information page](#) accesses this page and allows the user to Add/Edit/Remove [Company User Information](#).

The [Current Users](#) area is the first area and displays the following user information:

- **Modify button:** if the user wants to [Modify](#) User Information, click the [Modify button](#) and this takes the user to the [Update User Information page](#). (Refer to section 4.2.1 Modify Users)
- **Active:** a checkmark in the Active column shows that user status is Active, if there is no checkmark in the Active column the user has a status of Inactive.
- **Username:** the [Username](#) used to login as this user.
- **First Name:** the [First Name](#) of this user.
- **Last Name:** the [Last Name](#) of this user.
- **E-mail:** the [Email Address](#) for this user.
- **Phone:** the [Phone Number](#) for this user.
- **Default Location:** the branch/location that is the [Default Branch/Location](#) for this user.
- **Add/Edit Orders:** a checkmark in the [Add/Edit Orders](#) column shows that the user has rights to [Add/Edit Orders](#) in the Order Products module.
- **View All Orders:** a checkmark in the [View All Orders](#) column shows that the user has rights to [View All Orders](#) through the Service Search module.
- **Reports:** a checkmark in the [Reports](#) column shows that the user has rights to access the [Reports](#) module.
- **Admin:** a checkmark in the [Admin](#) column shows that the user has [Administration](#) rights to access the [Administration](#) module.
- **Remove:** checking the [Remove](#) column will remove the user from the current branch/location.
 - **Note:** Users can only be removed from non-default branch/locations. To remove a user from a default branch/location they must be changed to Inactive status at their default branch/location.

The [Add New/Existing Users](#) area is next and allows the user to [Add New Users](#) (Refer to section 4.2.2 Add New Users) and [Add Existing Users](#). (Refer to section 4.2.3 Add Existing Users)

The *Change Default Location* area is next and allows the user to change the default branch/location of users. (Refer to section 4.2.4 Change Default Location)

Please note the buttons located at the top and bottom of the page:

- ❑ *Admin Main button*: if the user wants to return to the *Current Information page*, click the *Admin Main button*.
- ❑ *Exit Admin button*: if the user wants to exit the Administration module, click *Exit Admin* and this takes the user back to the *Service Search page*.
- ❑ *Back button*: if the user wants to move to the previous page, click the *Back button*.
- ❑ *Clear Form button*: if the user decides that the data entered is inaccurate click the *Clear Form button* to clear all the fields on this page and allow the user to start again.
- ❑ *Update button*: if the user has made all of the changes they wish to make, click the *Update button* to update the page and save any changes that have been made.

- *Note*: Changes to a user's password can only be changed at the user's default branch/location.

Please note the buttons located at the top and bottom of the page:

- *Admin Main button*: if the user wants to return to the *Current Information page*, click the *Admin Main button*.
- *Exit Admin button*: if the user wants to exit the Administration module, click *Exit Admin* and this takes the user back to the *Service Search page*.
- *User Access button*: if the user wants to go to the *User Access page*, click the *User Access button*.
- *Update button*: if the user has made all of the changes they wish to make, click the *Update button* to update the page and save any changes that have been made.
- *Cancel button*: if the user decides that they do not want to continue editing the current page, click the *Cancel button*, any entered or changed information will not be saved.

4.2.1.1 Update User Access

Navigation Options have not been set.

UPDATE USER ACCESS - sherri2 for Southwest Bank

Add/Edit Orders

- DEFAULT:** The User does not have access to the Order products module and cannot place orders.
- Add/Edit:** Allows the user access to the Order Products module to place new orders and change the status, add comments, or add product orders to existing transactions. The user must have the ability to add orders at their default location to be granted Add/Edit Orders at other locations.

View Orders

- DEFAULT:** The User can only view orders they have submitted.
- View All Orders:** Allows the user to view all orders that are placed at any location associated with their Parent company, regardless if they are a valid user at that location.

Reports

- DEFAULT:** Allows the user access to the Reports module to process and view reports. The data included in the reports is determined by the user's View Order access.
- Suppress Reports:** The user does not have access to the Reports module and cannot process or view reports.

Administration

- DEFAULT:** The User does not have access to the Administration module.
- Admin:** Allows the user access to the Administration module to perform Administrative tasks.

UPDATE CANCEL

Clicking the [User Access button](#) located on the [Update User Information page](#) accesses this page and offers the ability to change the users access by adding/removing the following security rights:

- Add/Edit Orders:** allows the user access to the Order Products module to place new orders and change the status, add comments, or add product orders to existing transactions. The user must have the ability to add orders at their default location to be granted Add/Edit Orders at other locations.

- ❑ *View All Orders*: allows the user to view all orders that are placed at any location associated with their Parent company, regardless if they are a valid user at that location.
 - *Note*: Users can only be granted access to *View All Orders* through their default location by the Parent or Default Administrator.
- ❑ *Reports*: allows the user access to the Reports module to process and view reports. The data included in the reports is determined by the user's View Order access.
- ❑ *Admin*: allows the user access to the Administration module to perform Administrative tasks.
 - *Note*: Administration rights can only be granted at the user's default branch/location by the Parent or Default Administrator.

4.2.2 Add New Users

ADMIN MAIN
EXIT ADMIN

Add New Users for Company *Sherri's Test Customer*

Note: User names must be unique. Required fields for each new user are *italicized*.

<i>First Name</i>	<i>Last Name</i>	<i>Username</i>	E-Mail	Phone	<i>Password</i>	<i>Confirm Password</i>	Add/Edit Orders	View All Orders	Admin	Reports	<i>Default Location</i>
							<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Sherri's Test Customer ▾
							<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Sherri's Test Customer ▾
							<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Sherri's Test Customer ▾
							<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Sherri's Test Customer ▾
							<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Sherri's Test Customer ▾
							<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Sherri's Test Customer ▾
							<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Sherri's Test Customer ▾
							<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Sherri's Test Customer ▾
							<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Sherri's Test Customer ▾
							<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Sherri's Test Customer ▾
							<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Sherri's Test Customer ▾
							<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Sherri's Test Customer ▾
							<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Sherri's Test Customer ▾

BACK
 CLEAR FORM
 ADD

Clicking the [Add New Users button](#) located on the [Company User Administration page](#) accesses this page and allows the user to add new users by entering the following information:

- ❑ **First Name:** the [First Name](#) of the new user.
- ❑ **Last Name:** the [Last Name](#) of the new user.
- ❑ **Username:** the [Username](#) used to login the new user.
- ❑ **E-mail:** the [Email Address](#) for the new user.
- ❑ **Phone:** the [Phone Number](#) for the new user.
- ❑ **Password:** the [Password](#) for the new user.
- ❑ **Confirm Password:** re-enter the [Password](#) for the new user to confirm the spelling.
- ❑ **Add/Edit Orders:** a checkmark in the [Add/Edit Orders](#) column shows that the user has rights to [Add/Edit Orders in the Order Products module](#).
- ❑ **View All Orders:** a checkmark in the [View All Orders](#) column shows that the user has rights to [View All Orders through the Service Search module](#).
- ❑ **Admin:** a checkmark in the [Admin](#) column shows that the user has [Administration](#) rights to access the Administration module.
- ❑ **Default Location:** indicates the [Default Branch/Location](#) for the new user. A Parent Administrator can add users to any branch/location. The drop down menu displays all branch/locations available for the new user. A Child Administrator can only add users to their branch/location.

Please note the buttons located at the top and bottom of the page:

- ❑ **Admin Main button:** if the administrator wants to return to the [Current Information page](#), click the [Admin Main button](#).
- ❑ **Exit Admin button:** if the administrator wants to exit Administration, click [Exit Admin](#) and this takes the administrator back to the [Service Search page](#).
- ❑ **Back button:** if the administrator wants to move to the previous page, click the [Back button](#).
- ❑ **Clear Form button:** if the administrator decides that the data entered is inaccurate click the [Clear Form button](#) to clear all the fields on this page and allows the administrator to start again.
- ❑ **Add button:** if the administrator is satisfied with all the data entered, click the [Add button](#) to add the new information.

4.2.3 Add Existing Users

The screenshot shows a web interface for adding existing users. At the top, there are two buttons: 'ADMIN MAIN' and 'EXIT ADMIN'. Below these is a horizontal line, followed by the title 'Add Existing Users To Southwest Bank'. A note states: 'Note: The users listed below do not have access to Southwest Bank.' Underneath the note is the heading 'NORTHWEST BANK'. Below this heading is a table with a header row containing 'Add' and 'Name (Username)'. The table has one row with a checkbox and the text 'Nestle, Cheryl (Cheryl2)'. At the bottom of the interface are three buttons: 'BACK', 'CLEAR FORM', and 'ADD'.

Clicking the [Add Existing Users button](#) located on the [Company User Administration page](#) accesses this page and allows the administrator to add users that already exist at another Branch/Location to their branch/location. All active users are sorted by their Default Branch/Location. To select a user, check the box to the left of the user's name then click the [Add button](#) located at the bottom of the page.

- *Note:* Existing users are added to branch/locations without any rights other than [View All Orders](#) (if granted at their default branch/location). The Branch/Location Administrator must modify the user's rights through the [Company User Administration page](#) to enable them add [Add/Edit Orders](#).

Please note the buttons located at the top and bottom of the page:

- [Admin Main button](#): if the administrator wants to return to the [Current Information page](#), click the [Admin Main button](#).
- [Exit Admin button](#): if the administrator wants to exit the Administration module, click [Exit Admin](#) and this takes the administrator back to the [Service Search page](#).
- [Back button](#): if the administrator wants to move to the previous page, click the [Back button](#).
- [Clear Form button](#): if the administrator decides that the data entered is inaccurate click the [Clear Form button](#) to clear all the fields on this page and allows the administrator to start again.
- [Add button](#): if the administrator is satisfied with all the data entered, click the [Add button](#) to add the new information.

4.2.4 Change Default Location

New Default Location	Name (Username)	Current Default Location
*Southwest Bank	, (sherri2)	Southwest Bank
*Southwest Bank	Sellers, Steve (Steve2)	Southwest Bank
*Northwest Bank	Nestle, Cheryl (Cheryl2)	Northwest Bank

Clicking the [Change Default Location button](#) located on the [Company User Administration page](#) accesses this page and allows the administrator to change the default location of users by selecting a Branch/Location from the drop down menu located to the left of the user's name. Current default branch/locations are indicated with an asterisk preceding the branch/location name.

- o **Note:** Changes to a user's default branch/location can only be made by the Parent Administrator.

The [Filter Drop Down Menu](#) located to the right of the [Change Default button](#) on the [Company User Administration page](#) allows the administrator to select All Branch/Locations or a specific Branch/Location. If *All* is selected from the [Filter Drop Down Menu](#) then all users are shown, sorted by Branch/Location. If a specific Branch/Location is selected from the [Filter Drop Down Menu](#) then only users with a default location at that specific Branch/Location are shown.

Please note the buttons located at the top and bottom of the page:

- ❑ [Admin Main button](#): if the administrator wants to return to the [Current Information page](#), click the [Admin Main button](#).
- ❑ [Exit Admin button](#): if the administrator wants to exit the Administration module, click [Exit Admin](#) and this takes the administrator back to the [Service Search page](#).
- ❑ [Back button](#): if the administrator wants to move to the previous page, click the [Back button](#).
- ❑ [Reset button](#): if the administrator decides that the data entered is inaccurate click the [Reset button](#) to reset the drop-downs on this page and allows the administrator to start again.
- ❑ [Update button](#): if the administrator is satisfied with all the data entered, click the [Update button](#) to update the new information.

4.3 Products/Providers

ADMIN MAIN		EXIT ADMIN	
Product Information			
Service	Product (Default is BOLD)	Vendors (Default is BOLD)	
Appraisal	<input type="radio"/> UPDATE		
	Drive By (2065)	Sherri's Test Provider	
Automated Valuations	<input type="radio"/> UPDATE		
	Automated Property Valuation	Sherri's Test Provider	
Closing	<input type="radio"/> UPDATE		
	Closing and Escrow Services	Sherri's Test Provider	
Consumer Credit	<input type="radio"/> UPDATE		
	Three-in-file-merge	Sherri's Test Provider	
Flood	<input type="radio"/> UPDATE		
	Basic Certificate	Sherri's Test Provider	
Document Services	<input type="radio"/> UPDATE		
	Single Document	Sherri's Test Provider	
Title	<input type="radio"/> UPDATE		
	Commitment/Preliminary Report	Sherri's Test Provider	

Clicking the [Products/Providers button](#) located on the [Current Information page](#) accesses this page and allows the administrator to Add/Edit/Remove Products and/or Providers.

Products and Providers set up at the Parent are automatically copied over to Child branch/locations when they are Added. If Products and Providers are modified after the addition of the Child branch/location, each branch/location must be updated individually. Products and Providers can only be modified by the Default Administrator.

Please note the buttons located on the page:

- ❑ *Admin Main button*: if the administrator wants to return to the *Current Information page*, click the *Admin Main button*.
- ❑ *Exit Admin button*: if the administrator wants to exit the Administration module, click *Exit Admin* and this takes the administrator back to the *Service Search page*.
- ❑ *Update button*: if the administrator wants to add/edit/remove a Product or Provider, click *Update*.

4.3.1 Product Administration

ADMIN MAINEXIT ADMIN

Product Administration - Closing

Note: Currently selected products are displayed in *Italics*.

Update	Product
<input type="checkbox"/>	<i>Closing and Escrow Services</i>
<input type="checkbox"/>	Commercial Closing
<input type="checkbox"/>	Courtesy Closing
<input type="checkbox"/>	Document Filing
<input type="checkbox"/>	Document Signing Service
<input type="checkbox"/>	Full Closing-Centralized (Full ALTA)
<input type="checkbox"/>	Full Closing-Centralized (Non-Title/LTD)
<input type="checkbox"/>	ProductSelect (VM Only)
<input type="checkbox"/>	Sub-Escrow

CONTINUE

Clicking the [Update button](#) located next to a product on the [Product Information page](#) accesses this page and allows the administrator to select which products to modify by checking the box to the left of the product. Currently selected products are displayed in *Italics*. Once the appropriate products are checked, click the [Continue button](#) at the bottom of the page and this takes the administrator to the [Available Vendors page](#).

Please note the buttons located at the top and bottom of the page:

- ❑ [Admin Main button](#): if the administrator wants to return to the [Current Information page](#), click the [Admin Main button](#).
- ❑ [Exit Admin button](#): if the administrator wants to exit the Administration module, click [Exit Admin](#) and this takes the administrator back to the [Service Search page](#).
- ❑ [Continue button](#): if the administrator is satisfied with all the data entered, click the [Continue button](#) to move to the next page in the process.

4.3.1.1 Available Vendors

ADMIN MAINEXIT ADMIN

Available Vendors - Document Signing Service

Make this the default product.

Display	Default Vendor	Vendor Names
<input type="checkbox"/>	<input type="radio"/>	A1 Test Provider
<input type="checkbox"/>	<input type="radio"/>	Appraisal City
<input type="checkbox"/>	<input type="radio"/>	Dev Test Vendor
<input type="checkbox"/>	<input type="radio"/>	FNLD Provider - XML Test Account
<input type="checkbox"/>	<input type="radio"/>	General American Corporation-TEST ACCOUNT
<input type="checkbox"/>	<input type="radio"/>	Jason's Test Vendor (XML-eMail2)
<input type="checkbox"/>	<input type="radio"/>	Sherri's Test Provider
<input type="checkbox"/>	<input type="radio"/>	Stacey Provider Test
<input type="checkbox"/>	<input type="radio"/>	Stewart Title Demo
<input type="checkbox"/>	<input type="radio"/>	Vendor Integration Test 6
	<input type="radio"/>	No Default Vendor

Remove this product from being offered.

Clicking the [Continue button](#) located at the bottom of the [Product Administration page](#) accesses this page and displays all available vendors for the specific product listed at the top of the page.

The following options are offered on this page:

- ❑ **Default Product:** if the administrator wants the [Product Selection field](#) to be defaulted to this product, check the [Default Product box](#).
- ❑ **Display Product:** if the administrator wants this product to be displayed to the Customer as an available product to order, check the [Display Product box](#).
- ❑ **Default Vendor:** if the administrator wants the [Service Provider Selection field](#) to be defaulted to this Vendor, check the [Default Vendor box](#).
- ❑ **No Default Vendor:** if the administrator does not want any Vendor to be displayed as the [Default Vendor](#), check the [No Default Vendor box](#).
- ❑ **Remove Product:** if the administrator does not want this product to be displayed to the Customer as an available product to order, check the [Remove Product box](#).

Once the appropriate boxes are checked, click the [Continue button](#) at the bottom of the page and this takes the administrator back to the [Product Information page](#).

Please note the buttons located at the top and bottom of the page:

- ❑ *Admin Main button*: if the administrator wants to return to the *Current Information page*, click the *Admin Main button*.
- ❑ *Exit Admin button*: if the administrator wants to exit the Administration module, click *Exit Admin* and this takes the administrator back to the *Service Search page*.
- ❑ *Continue button*: if the administrator is satisfied with all the data entered, click the *Continue button* to move to the next page in the process.

4.4 Add Branch/Location

ADMIN MAINEXIT ADMIN

Branch/Location Information

Required information is indicated by ◆

Name: ◆

Address Line 1 ◆ Address Line 2

City ◆ State ◆ Zip ◆

Phone ◆ Fax

Contact

	First	MI	Last
Name:	<input type="text"/> ◆	<input type="text"/>	<input type="text"/> ◆
Phone	<input type="text"/> ◆	Fax	<input type="text"/>
Email	<input type="text"/> ◆		

BACK CLEAR FORM ADD

Clicking the [Add Branch/Location button](#) located on the [Current Information page](#) accesses this page and allows the administrator to add a Branch/Location by entering the following information:

- *Note:* The [Add Branch/Location](#) function is only available to the Parent Administrator. The [Company Information](#) area is the first area and allows the administrator to enter the Branch/Location Information.

The [Branch/Location Information](#) area contains the following fields:

- [Name](#): the name of the Branch/Location.
- [Address Line 1](#): the street address of the Branch/Location.
- [Address Line 2](#): the street address of the Branch/Location.
- [City](#): the city in which the Branch/Location is located.
- [State](#): the state in which the Branch/Location is located.
- [Zip](#): the zip code in which the Branch/Location is located.
- [Phone](#): the phone number of the Branch/Location.
- [Fax](#): the fax number of the Branch/Location.
- [Contact's First Name](#): the first name of the contact for the Branch/Location.
- [Contact's Middle Initial](#): the middle initial of the contact for the Branch/Location.
- [Contact's Last Name](#): the last name of the contact for the Branch/Location.
- [Contact's Phone](#): the phone number of the contact for the Branch/Location.
- [Contact's Fax](#): the fax number of the contact for the Branch/Location.
- [Contact's Email Address](#): the email address for the contact for the Branch/Location.

Please note the buttons located throughout the page:

- ❑ *Admin Main button*: if the administrator wants to return to the *Current Information page*, click the *Admin Main button*.
- ❑ *Exit Admin button*: if the administrator wants to exit the Administration module, click *Exit Admin* and this takes the administrator back to the *Service Search page*.
- ❑ *Back button*: if the administrator wants to move to the previous page, click the *Back button*.
- ❑ *Clear Form button*: if the administrator decides that the data entered is inaccurate click the *Clear Form button* to clear all the fields on this page and allows the administrator to start again.
- ❑ *Add button*: if the administrator is satisfied with all of the data entered, click the *Add button* to add the new information.

4.5 Edit Branch/Location

ADMIN MAINEXIT ADMIN

Northwest Bank Branch Information

Required information is indicated by ◆

Name:	<input type="text" value="Northwest Bank"/>		
Address Line 1	<input type="text" value="6589 Michelin Lane"/>	Address Line 2	<input type="text" value="Suite 2001"/>
City	<input type="text" value="San Bernardino"/>	State	<input type="text" value="CA"/>
		Zip	<input type="text" value="92632"/>
Phone	<input type="text" value="(800) 577-8457"/>	Fax	<input type="text" value="(800) 633-5477"/>

Contact

	First	MI	Last	
Name:	<input type="text" value="Jason"/>	<input type="text" value="H"/>	<input type="text" value="Kennedy"/>	
Phone	<input type="text" value="(800) 988-5785"/>	Fax	<input type="text" value="(800) 547-8458"/>	
Email	<input type="text" value="Jason@Northwest.com"/>			

BACKRESETUPDATE

Clicking the [Edit Branch/Location button](#) located on the [Current Information page](#) accesses this page and allows the administrator to edit any of the following information on the Branch/Location:

- *Note:* The [Edit Branch/Location](#) function is only available to the Parent Administrator.

The [Branch/Location Information](#) area is the first area and allows the administrator to edit the Branch/Location Information. The [Branch/Location Information](#) area contains the following fields:

- [Name](#): the name of the Branch/Location.
- [Address Line 1](#): the street address of the Branch/Location.
- [Address Line 2](#): the street address of the Branch/Location.
- [City](#): the city in which the Branch/Location is located.
- [State](#): the state in which the Branch/Location is located.
- [Zip](#): the zip code in which the Branch/Location is located.
- [Phone](#): the phone number of the Branch/Location.
- [Fax](#): the fax number of the Branch/Location.
- [Contact's First Name](#): the first name of the contact for the Branch/Location.
- [Contact's Middle Initial](#): the middle initial of the contact for the Branch/Location.
- [Contact's Last Name](#): the last name of the contact for the Branch/Location.
- [Contact's Phone](#): the phone number of the contact for the Branch/Location.
- [Contact's Fax](#): the fax number of the contact for the Branch/Location.
- [Contact's Email Address](#): the email address for the contact for the Branch/Location.

Please note the buttons located throughout the page:

- ❑ *Admin Main button*: if the administrator wants to return to the *Current Information page*, click the *Admin Main button*.
- ❑ *Exit Admin button*: if the administrator wants to exit the Administration module, click *Exit Admin* and this takes the administrator back to the *Service Search page*.
- ❑ *Back button*: if the administrator wants to move to the previous page, click the *Back button*.
- ❑ *Reset button*: if the administrator wants to change all of the information back to what it was originally, click the *Reset button*.
- ❑ *Update button*: if the administrator has made all the changes they wish to make, click the *Update button* to update the page and save any changes that had been made.

4.6 Edit Branch/Location Users

Modify	Active	Username	First Name	Last Name	E-Mail	Phone	Default Location	Add/Edit Orders	View Orders	Reports	Admin	Remove
<input type="radio"/> MODIFY	<input checked="" type="checkbox"/>	Cheryl2	Cheryl	Nestle	Cheryl@Northwest.com	(800) 625-8478	Northwest Bank	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Clicking the [Edit Branch/Location Users](#) button accesses this page and allows the administrator to Add/Edit/Remove [Branch/Location User Information](#).

- o **Note:** The [Edit Branch/Location Users](#) function is only available to the Parent Administrator.

The [Current Users](#) area is the first area and displays the following user information:

- **Modify button:** if the administrator wants to [Modify](#) User Information, click the [Modify button](#) and this takes the administrator to the [Update User Information page](#). (Refer to section 4.2.1 Modify Users)
- **Active:** a checkmark in the Active column shows that user status is Active; if there is no checkmark in the Active column the user has a status of Inactive.
- **Username:** the [Username](#) used to login this user.
- **First Name:** the [First Name](#) of this user.
- **Last Name:** the [Last Name](#) of this user.
- **E-mail:** the [Email Address](#) for this user.
- **Phone:** the [Phone Number](#) for this user.
- **Default Location:** the branch location that is the [Default Branch/Location](#) for this user.
- **Add/Edit Orders:** a checkmark in the [Add/Edit Orders](#) column shows that the user has rights to [Add/Edit Orders](#).
- **View All Orders:** a checkmark in the [View All Orders](#) column shows that the user has rights to [View All Orders](#).
- **Reports:** a checkmark in the [Reports](#) column shows that the user has rights to access the [Reports](#) module.
- **Admin:** a checkmark in the [Admin](#) column shows that the user has [Administration](#) rights.

The [Add New/Existing Users](#) area is next and allows the administrator to [Add New Users](#) (Refer to section 4.2.2 Add New Users) and [Add Existing Users](#). (Refer to section 4.2.3 Add Existing Users)

The [Change Default Location](#) area is next and allows the administrator to [Change Default Location](#) of users. (Refer to section 4.2.4 Change Default Location)

Please note the buttons located at the top and bottom of the page:

- ❑ *Admin Main button*: if the administrator wants to return to the *Main Administration page*, click the *Admin Main button*.
- ❑ *Exit Admin button*: if the administrator wants to exit Administration, click *Exit Admin* and this takes the administrator back to the *Service Search page*.
- ❑ *Back button*: if the administrator wants to move to the previous page, click the *Back button*.
- ❑ *Clear Form button*: if the administrator decides that the data entered is inaccurate click the *Clear Form button* to clear all the fields on this page and allow the administrator to start again.
- ❑ *Update button*: if the administrator has made all the changes they wish to make, click the *Update button* to update the page and save any changes that had been made.

Appendix A: Administration Rights

<u>Function</u>	<u>Parent Administrator</u>	<u>Child Administrator (Default)</u>	<u>Child Administrator (Non-Default)</u>	<u>Rules</u>
Edit Company Information	Y	Y	Y	
Edit User Information	Y	Y	Y	
Modify Current User	Y	Y	Y	A Parent Administrator can modify any user at any location (parent or child, default or non-default) via EDIT USERS or EDIT BRANCH/LOCATION USERS. Child Administrators can only edit users with access to their Branch/Location. Any changes made by the Child apply only to the security for the associated Branch/Location.
Inactive/Active	Y	Y	N	Can only be changed when Modifying the user through their default location. Disables the user from logging into RAPID . If the user is changed to Active their security is reset at all Branch/Locations to View Only (i.e. they are only able to view orders they have placed). Their security rights must be re-established by the administrator. To modify an inactive user they must either be changed to Active or RAPID contacted.

<u>Function</u>	<u>Parent Administrator</u>	<u>Child Administrator (Default)</u>	<u>Child Administrator (Non-Default)</u>	<u>Rules</u>
Change Location Default	Y	N	N	Can only be changed when Modifying the user through their default location. If the default is changed the user's rights are rest to View Only at all Branch/Locations where the user has access.
Password	Y	Y	N	Can only be changed when Modifying the user through their default location.
Add/Edit Orders	Y	Y	Y/N	If the user does not have access to add orders at their default they cannot add them at any other Branch/Locations. If they can add orders at their default the Child Administrator can allow the addition of orders at their branch/location. If Add/Edit Orders is deselected at the default branch/location it is deselected at all other Branch/Locations for that user.
View All Orders	Y	Y	N	View All Orders can only be set at the default location. If it is checked the user can view all order placed at the Branch/Locations they have access to, regardless of their ability to Add/Edit Orders at those branch/locations.
Administration	Y	Y	N	Users can only be Administrators at their default locations.

<u>Function</u>	<u>Parent Administrator</u>	<u>Child Administrator (Default)</u>	<u>Child Administrator (Non-Default)</u>	<u>Rules</u>
Remove Current User	Y	Y	Y	A user can be Removed from any branch/location other than their default branch/location (they must be changed to Inactive at their default). Removing the user from a branch/location does not affect their access or security rights at any other branch/location.
Add New User	Y	Y	Y	If a Parent accesses Add New Users from EDIT USERS they can add new users to any branch/location. If accessed through EDIT BRANCH/LOCATION USERS they can only add to the associated Branch/Location. A Child Administrator can only add users to their own Branch/Location
Add Existing User	Y	Y	Y	Any Administrator can give existing active users access to their Branch/Location. Users default with View Only security until modified by the Child Administrator. Only users without access to the current Branch/Location being modified appear on this page. The users are sorted by Branch/Location and then last name.

<u>Function</u>	<u>Parent Administrator</u>	<u>Child Administrator (Default)</u>	<u>Child Administrator (Non-Default)</u>	<u>Rules</u>
Change Location Default	Y	N	N	Accessed through EDIT USERS or EDIT BRANCH/LOCATION USERS, the administrator can change the default for any employee that is active and already has access to the given branch. The drop-down includes only the Branch/Locations the user currently has access to. An asterisk(*) indicates the user's default Branch/Location. Users appear once, sorted by their default location, then sorted by their last name. When a user's default is changed their security at all Branch/Locations is reset to View Only.
Edit Products/Providers	Y	Y	Y	Products and Providers are copied from the Parent to all Children when Branch/Locations are initially added. Any modifications thereafter must be made by the Child Administrator.
Add Branch/Location	Y	N	N	Branch/Locations inherit Parent attributes with the exception of their name, address, and users. All Products/Providers are copied. If no Products/Providers exist for Parent then the Child Administrator must add them to Branch/Location.
Edit Branch/Location	Y	N	N	
Edit Branch/Location Users	Y	N	N	Allows the modification of users at the associated Branch/Location.
Delete Branch/Location	N	N	N	Must contact <i>RAPID</i>