

## Paperless Closer Quick Reference Guide

www.titletex.com

Your Window into the Title Company Computer Basilhoyl@yahoo.com (817) 685-0555

Your branch is BH and your closer is Basil Hoyl. User Name:\_\_\_\_\_ Password:\_\_\_\_\_  
*To see an example: Title Texas*

**Step One:** To access paperless closer, you must first go to the Title Texas website at www.titletex.com. Select the icon, **place an order**. This will bring you into the database. Once inside you will enter your user name and password. This will open the main lobby displaying all of your currently open orders and allow you to enter a new order.

**Step Two:** Once you have identified the file you wish to open single click the file number, which will be underlined. This will bring you into the contact page displaying all parties related to this file.

From this point on you will navigate using the tabs at the top of the page. (Property info, File Status, Documents, Disbursements/Funding, Logoff)

### Description of Tabs

**Lobby:** Lists all files associated with the username and password. Allows user to view orders and add a new entry.

**Contacts:** Lists the parties associated with the selected file such as buyer, seller, lender, referral and agent.

**Property Info:** Displays property tax information and legal description.

**File Status:** Displays all events occurring with any notes added pertaining to that event. Also enables parties to enter note as a form of communication.

**All notes added to a file are monitored continuously by our corporate headquarters to ensure a prompt response.**

**Documents:** Allows you to view and print documents pertaining to a file such as a HUD settlement statement. To open, select the desired document (a check will appear in the box) then select **Print Selected Document**. This will open the document in Word. To print after viewing go to file and select print. To close select the **X** at the top of the page.

**Note, if you observe any errors in one of the documents please contact your closer either by inserting a note, e-mailing them via the contact page or calling them directly.**

### **Submit Documents:**

This icon is found in the document tab as well. It allows you to submit an additional form into the file. To do this single click Submit Documents. Then proceed to name the document. Then highlight browse and find the desired document. Then hit submit and it now becomes part of the file.

### **Disbursement/Funding:**

Identifies all parties receiving monies for this transaction.

**Logoff:** Allows you to exit the system. If you wish to stay in the system and move to another file, select Lobby.

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### **Commonly Asked Questions:**

1. Where can I enter my client's social security number and payoff information?  
**A. In the note section.**
2. What if I have an order that is not in the Fort Worth/Dallas area?  
**A. Our office can accommodate this. Please let us know early if you desire to have your client signed at his home or office or after hours or on weekends or out of town.**
3. What if I want to allow my buyer/seller/lender/etc. to view this information but do not want them to view all portions, such as the disbursement sheet?  
**A. Each account can be customized to fit your needs including blocking out some portions of the file. Please contact Basil Hoyl via e-mail - bhoyl@titletex.com for detailed information.**
4. How can I have an icon placed at the bottom of my screen or my desktop to easily access Paperless Closer?  
**A. Contact Basil Hoyl and he will be happy to assist you in any way you require.**
5. If there is a problem with the file or curative work is needed, will a lawyer be able to help?  
**A. Basil Hoyl is a lawyer. We also have Russell Garrett in the office and we have access to underwriters and corporate services if needed.**
6. If I have a problem with the computer, what can I do?  
**A. Our office still uses telephones and fax machines. You can always call and speak with a human being to address any issues you may have.**
7. If I have a question using the program, where can I get help?  
**A. There is a help screen and a tutorial program at the Lobby. If these can not answer your questions, please call Basil Hoyl and we have a corporate IT department if your closer can not immediately solve the problem.**
8. What is the best way to communicate?  
**A. E-mail Basilhoyl@yahoo.com is the preferred method. This avoids any "telephone-tag" but you may call the office (817) 685-0555, call the cell phone (817) 705-8827 or fax the office.**