USA DIGITAL SOLUTIONS INC.

Impact Online

Version 3.1.15

External User's Manual

Table of Contents

Introduction

Impact Online v3.1.15 is a web-based application that allows Title and Escrow Company clients to open orders and to view critical escrow file information, including documents and escrow status, from anywhere, through the convenience of a web browser. Documents may also, depending upon configuration, be able to be uploaded by the clients, to the Company's Impact Online site. The application is directly integrated with the Title and Escrow Company's Impact/SQL software suite, so all information shown is up-to-date. Impact Online is compatible with Internet Explorer 6.0.

This manual, Impact Online – External User's Manual, provides the information needed by a customer of the Title and Escrow Company to utilize Impact Online. While not all features explained may be available on the Company's particular Impact Online installation, they are explained herein. The external clients of the Title and Escrow Company should contact their company representatives with any questions that arise.

The URL for the web site will be established by the Company, and will be provided to the client. Often, companies will provide a link to their Impact Online site from their main web site. The Impact Online site will be branded with the Company's name; in this manual the vendor of the software's name is used to brand the site. Once reached, the Impact Online Login Screen (shown below) is presented:
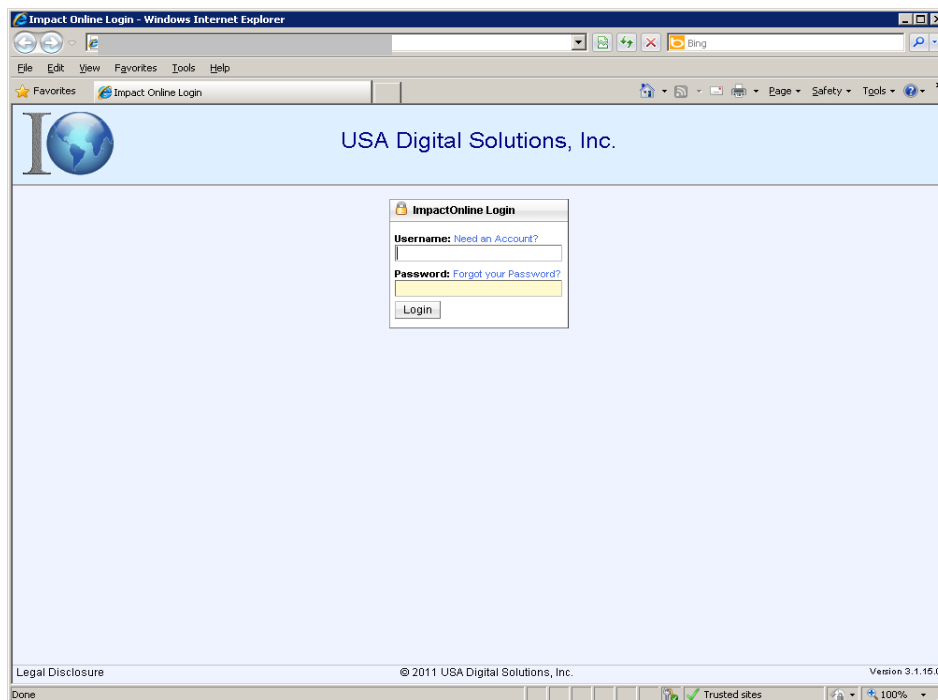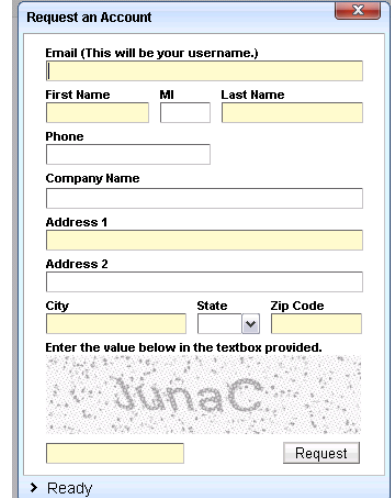
As an external user, you will gain access to Impact Online after having received an email from the Title and Escrow Company containing your login information (Username and Password) after they have set you up in the system. They may initiate your setup, or you may initiate it from the Impact Online Login screen, by clicking on the **Need an Account?** link, if available (seen above, next to the **Username** label).

If you have your Username and Password, enter them and click on the **Login** button. If not, click on the **Need an Account?** link and the following screen will be presented.

Need an Account?

The screen presented, when you click on the **Need an Account?** link, provides fields into which you will enter you *email address*, *first name*, middle initial, *last name*, phone number, company name, *address line 1*, address line 2, *city*, *state* and *zip code* (as shown to the right; field names in *italics* are required). You will also be asked to enter the contents of the information that appears in the graphic near the bottom of the screen into the textbox below the graphic. This is a security measure, and is required.
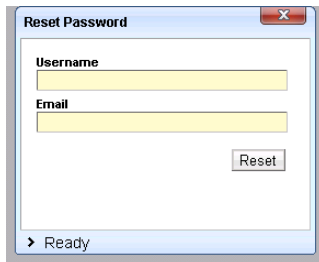
Once all of the information has been entered, click on the Request button, and the information you entered will be sent to administrative users at the Company. Once they have reviewed the request, and have determined the rights you should have within the system, they will approve your request and a random password will be generated for you. An email notification will be sent to you containing the information you will need to login and get started with Impact Online.

Forgot your Password?

If you have forgotten your Password, click on the **Forgot your Password?** link, on the Impact Online Login screen, next to the **Password** label. A Reset Password screen will be presented, as shown here.

Enter your **Username** and **Email** address (likely will be the same values) and then click on the **Reset** button. The Username and Email address must match data in the system or an error message will be presented. If a match is found, the system will generate a new, random, password and you will receive an email with the new password. You can then change your password to something you can more easily remember, once you are logged in.

My Account

Once you have received the account confirmation from Impact Online, you can log into the system. When you first log in, you will need to access your account information and complete the account setup. Completing this task will allow you to enter information for your account.

Once you are successfully logged into Impact Online, the first screen you will see is called the homepage. While this page consists of several tabs, for current purposes, we will be concentrating on the **My Account** tab. (**The additional tabs displayed will be addressed later in this manual.**)

Account Information

From the **Account Information** tab of the **My Account** tab, you can change your Password, set your Company Name, Phone Number, Email Address, Address, City, State and Zip Code. You should notify the Title and Escrow Company if you change your email address, as that is your identifier on files in their system. This information is sent to the escrow application during order entry.

Change Password

Use this link to make any changes to your password. You will be prompted for the old password and then to enter and confirm the new password. Once this is completed a confirmation message will appear onscreen.

Company Name

This field stores your company name.

Phone

This field stores your phone number. Phone number field will only accept numerical values, however, it will format once you tab to a new field. Entering 6028668199 will result in (602) 866-8199.

Email

This field stores your email address. The email address must be formatted correctly with an "@" and a "." This email address is used as the user name for accounts created with the new version of Impact Online. This address must match data entered in Impact/SQL, for the **Search** function to validate you as a party to the file.

Address1 and Address2

These fields store your address information.

City

This field stores your city information.

State

The state dropdown is used to enter your state designation. This tool can be accessed in a couple of ways.

1. Enter the first character of the state abbreviation. If there are several states that begin with that letter, repeat the character until your state's abbreviation appears.

2. Use the drop down box to display a listing of the states and click on the appropriate state.

Zip Code

This field stores your zip code information.

Click on the Save Information button to save any changes made on this tab.

Order Defaults

The **Order Defaults** tab, under the **My Accounts** tab, contains information on which branch, escrow officer, title officer and marketing representative should be defaulted on new orders you open through Impact Online. The left side of the screen contains the aforementioned **Basic Defaults**, and the right side of the screen provides for the assignment of **Party Defaults**. There is a sample of this tab's screen on the next page of this manual.

Basic Defaults

Branch

This option allows you to select a default branch, of the Title and Escrow Company, for all orders you open. The list that appears, in this dropdown, displays all active branches of the Company. This entry defines a default for easy order entry; you will be able to change the branch on individual orders, if necessary.

Escrow Officer

This option asks you to select an escrow officer, at the default branch selected, to use on all orders opened online. While this selection will be used as the default, you will be able to select a different escrow officer when opening an order.

Title Officer

This option allows you to select a title officer, of those available to the default branch selected, to use on all orders opened online. While this selection will be used as the default, you will be able to select a different title officer when opening an order.

Marketing Rep

This option allows you to select a marketing representative to use on all orders opened online. While this selection will be used as the default, you will be able to select a different marketing rep when opening an order.
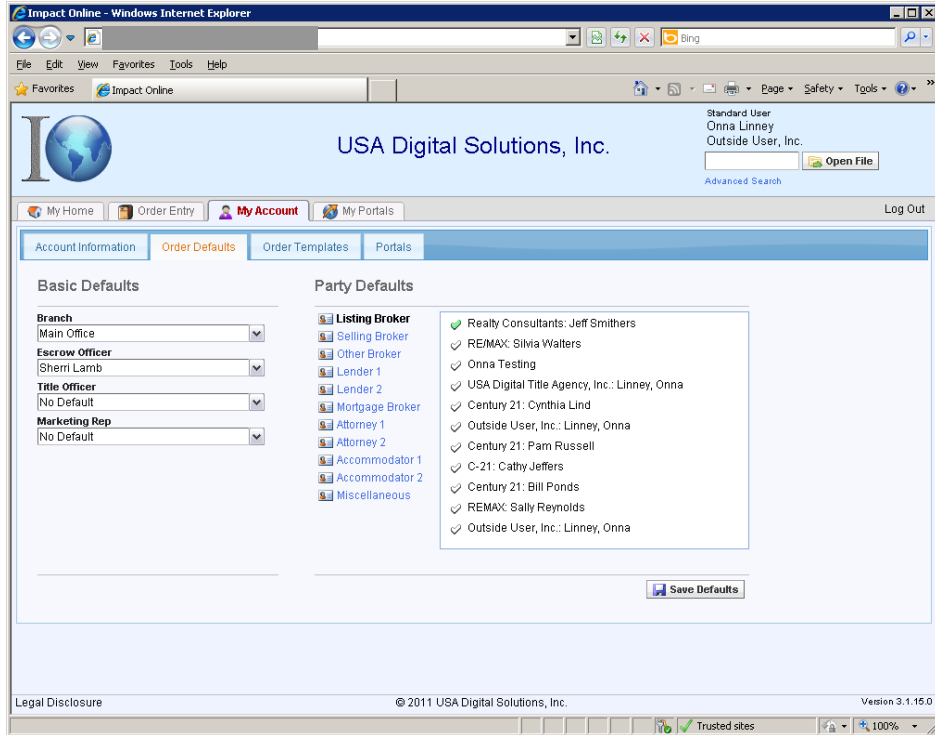
Party Defaults

Under the Party Defaults heading, there is a listing of the various types of "parties to the file" (brokers, lenders, attorneys, etc.). Clicking on each party type will present a listing of all parties of that type that exist on files you are a party to in the Company's system. Clicking on a name in the listing will provide some information on the party. Clicking on the white checkmark in front of the party name will change it to a ✔ green checkmark and indicate that that party is the default for this party type. Only one party can be selected as the default for each party type. It is not a requirement that there be a default for each party type. On the sample screen above, the default Listing Broker is "Realty Consultants: Jeff Smithers".

Click on the 💾 Save Defaults button to save changes made on the **Order Defaults** tab.

Order Templates

The **Order Templates** tab, under the **My Account** tab, is used to create templates for the types of orders you will routinely enter. The templates will speed up the order entry routine as you can pre-fill as much detail as you wish, and save the template under a name you can select at the time of creating a real order.

When first presented, the Order Templates tab will present as shown below, with a ⬜ **Create Template** button which is used to start the process of establishing an order template.
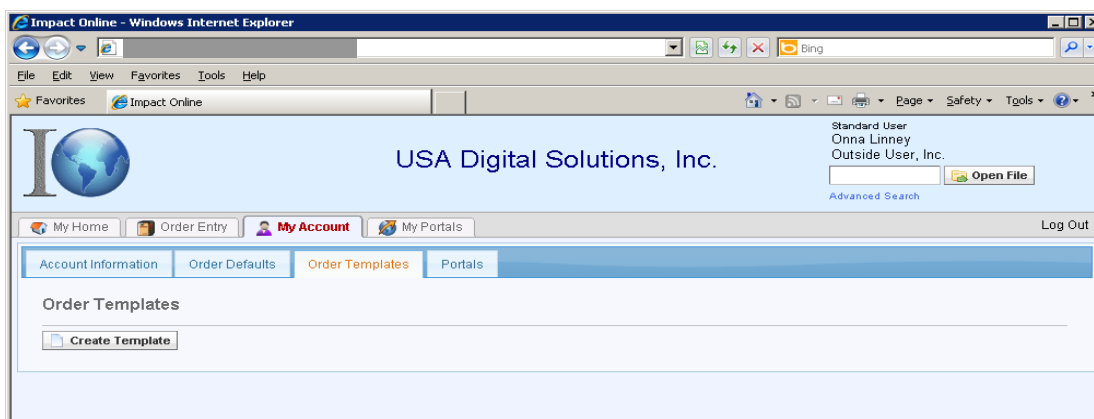
The next screen presented will ask for a name for the new template. Enter a **Template Name** that will remind you of the type of order template you are creating, such as "Refi Order Template" and then click on the **Save Name** button. At that point, the first screen of the Order Template Wizard will be presented. The set of screens presented is identical to those presented when opening an order…but in this instance you are entering default values so you do not have to enter them on each new order. You are, in effect, creating a "master order" than you will be able to copy and use as the starting point for each order of this type.


In the screen shot to the left, the **Jump to Section** dropdown list is presented, showing all of the screens (by name) in the **Order Template Wizard**.

Make any and all selections on the **Order Details** screen, then click on the **Next** or **Next Section** button. Some sections have multiple screens, so the Next button will move you to the next screen in the section or to the first screen of the next section, if there are no more in the current section.

Depending on the type of order template being set up, you may have data for some screens and not for others. Use the **Jump to Section** dropdown to quickly move to a screen you wish to enter default information on.

When you have entered all of the default information you think you would want, click on the [X] **Close This Window** icon, in the upper right-hand corner, on the Order Template Wizard banner, and the screen will switch to one like that shown below, where the defaulted **Order Details**, **Property Details** and **Order Parties** are presented.
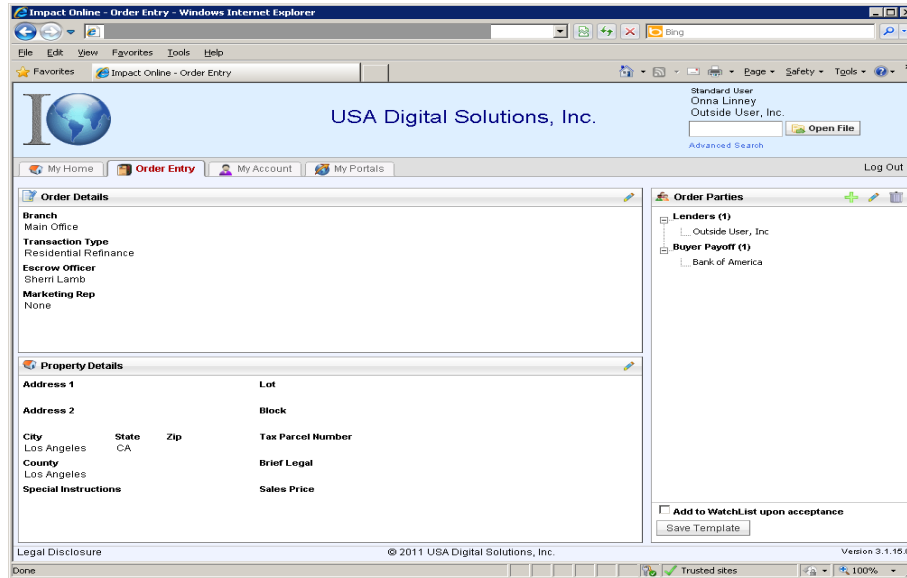
Use the ✏ Edit icon, in the upper right corner of each section of the screen to edit the template. You will need to highlight a specific Order Party for the ✏ Edit icon to work in that section; it will take you to the Order Template Wizard screen for that party. Clicking on the ✚ Add Party icon, on the Order Parties banner, will take you back to the Order Template Wizard Order Details screen, where you can select the party type to add from the Jump to Section dropdown. Highlighting a specific party and clicking on the 🗑 Delete icon, in the Order Parties banner, will lead to deletion of the default party selected.

If you want the template to default to having your orders placed on your WatchList upon acceptance by the Company, check the **Add to WatchList upon acceptance** checkbox in the bottom right of the screen.

Click on the **Save Template** button, in the bottom right of the screen, to save the template as configured. The new template will then appear on the Order Templates tab, as shown below. From this listing, the template(s) can be ✏ edited or 🗑 deleted, with the appropriate icon to the right of each template listed.
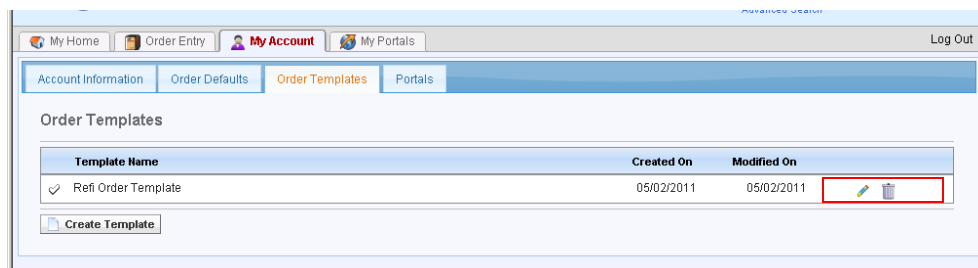
To make a template the default to be used, click on the white checkmark in front of the name so it turns to a ✅ green checkmark.

Portals

The last tab on the **My Account** tab, is **Portals**. This tab is used to enter credentials (user name and password) that are required for web portals that have been enabled for the user. Portals that do not require credentials are not listed on the screen.

If there are portals listed that you wish to have your login information stored for, click on the ⊕ Add Credentials icon, to the right of the portal to be edited, and then enter your login and password in the fields provided.

Click on the **Update** button when finished, to save your entries.

This concludes the discussion of self-configuration of your Impact Online account. Questions about your account should be addressed to your Company representative.

My Home

Once you have logged into Impact Online, you will be presented with a screen like that shown below, with the **My Home** tab selected. Your name and company name will be presented at the top right of the screen, right above the **Open File** button. There are three other tabs shown at the top of the screen, in this example, **Order Entry, My Account** and **My Portals**. The presence of the **Order Entry** tab indicates this user has "rights" to open orders via Impact Online. The **My Account** tab, as previously described, is where the user will manage their Impact Online account. The first time you use Impact Online it would be a good idea to review the information on the **My Account** window, to ensure it is accurate.
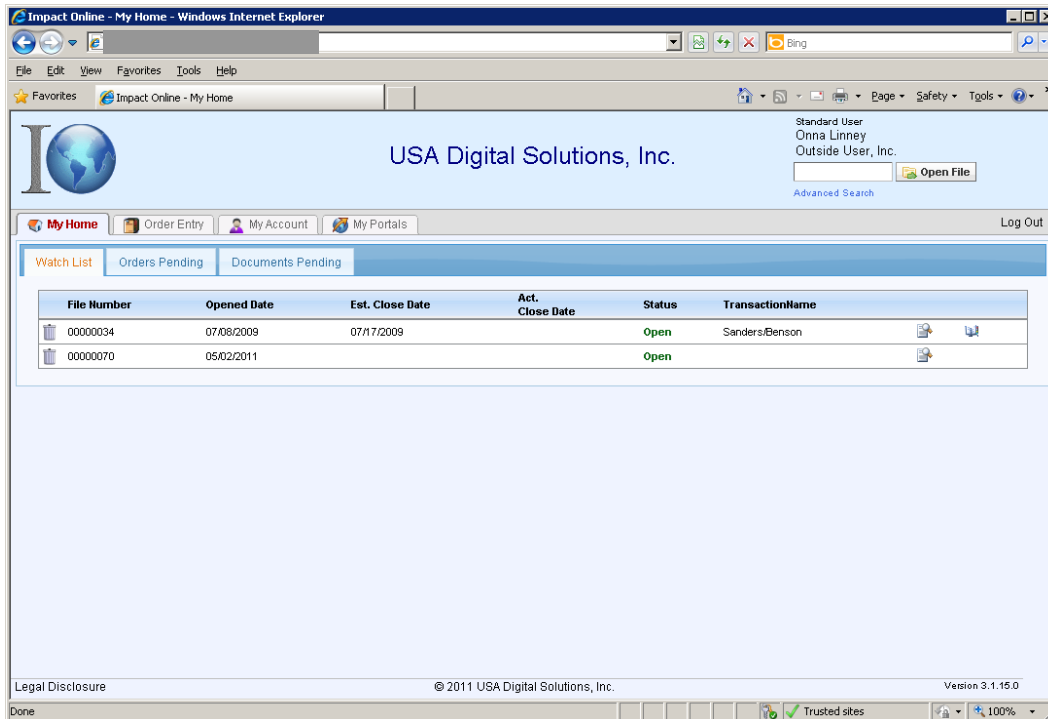
On the **My Home** tab, a sub-set of tabs is displayed: **Watch List**, **Orders Pending** and **Documents Pending**. The Watch List tab is selected when you first log in. If the Company's system is configured to automatically approve all orders submitted, you will not see an Orders Pending tab. If the Company's system is configured to automatically approve all uploaded documents, you will not see a Documents Pending tab. If there are items listed on the Orders Pending and Documents Pending the tabs a green check mark ✔ will appear in front of the tab name (in the screen shot above neither tab is so labeled, so you know there are no Orders Pending or Documents Pending items.) If there are no files on your Watch List, a message to that effect will display on the screen.

Watch List

Files that you have requested to be included on the Watch List will be listed on this tab. These are files to which you are a party, in one way or another, and are interested in monitoring. Files can be added to your Watch List after you open an order with Impact Online (and the order is accepted), or from the File Summary screen reached after doing a search.

Note: In order for a user to search and locate a file to add to their Watch List, they must be a party to the transaction and their email address must be on the file in Impact/SQL.

The Watch List will list the **File Number**, **Opened Date**, **Estimated Close Date**, **Actual Close Date**, **Status** of the file and the **Transaction Name**(s).

In addition to that information, there will be a "trash can" 🗑 icon at the far left of each file listed. You can click on that icon to remove a specific file from your Watch List.

You may see up to three icons on the right side of each file listed:

🔍 - this icon will take you to the **File Summary** window for the file, and to the **Summary** tab thereon.

📑 - this icon, if visible, indicates there are documents available for viewing, and clicking on the icon will take you to the **Documents** tab of the File Summary window, where the documents will be listed and the Acrobat PDF icon 📕 on that window will open the document selected for viewing.

📝 - this icon, if visible, indicates that there is **Tracking** information available for viewing for the file and clicking on the icon will take you to the Tracking tab of the File Summary window.

Before describing the functionality of the **Orders Pending** and **Documents Pending** windows, the **Order Entry** function will be explained, as that is the logical starting point for a external client's work in Impact Online.
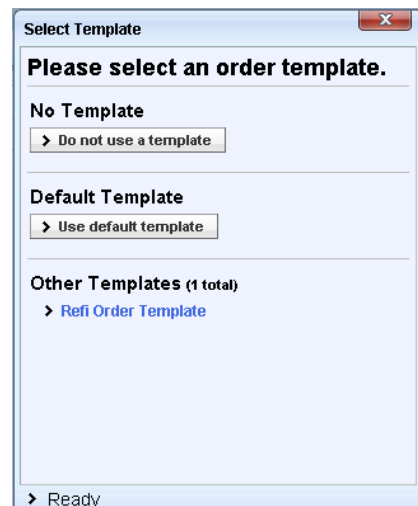
Order Entry

The **Order Entry** tab, near the top of the window, will take you to the series of windows that are used to gather information on a new order. Impact Online is equipped with an **Open Order Wizard** that walks the user through the open order process. Each individual section of the open order queue is reflected in its own independent window.   When you click on the **Order Entry** tab, you will be presented with the **Select Template** screen.

On this screen, you can indicate that no template should be used, or that the default template you defined in **My Account** should be used or you can select from the **Other Templates** list for the template you wish to use. Clicking on the desired selection will start up the **Order Entry Wizard**, either with a selected template or with no template loaded. In the sample screens that follow, no data beyond the order defaults are pre-loaded, as no template was selected.

Once file information is entered and you submit the order, the system will place the file in a pending status waiting acceptance by the Title and Escrow Company. The ability to modify and/or add information to the order is available until the order has been accepted. You can decide to place the order on your **Watch List,** upon acceptance by the escrow operation, at the time of submission.

When the order is accepted (or rejected) by the Title and Escrow Company, you will receive an email containing the file number for the new transaction, or an explanation for the rejection. Depending on the workflow of the Company, the review and acceptance (or rejection) of the order may occur in a few minutes or hours, or possibly the next day. If the Company's Impact Online installation is configured to automatically accept an order when submitted (not the typical configuration), you will receive an email notification of the new transaction's file number immediately.

The following comments will discuss conventions used in order entry and navigation tools used within the wizard. Then, the sections of the Open Order Wizard will be presented, with helpful comments.

Helpful Hints on Entering Information

NOTE: Please review these Helpful Hints on Entering Information for guidelines for entering information properly into the Order Entry Wizard windows. Entering the data as correctly as possible and within these guidelines will assist in making the open order process quick, easy and efficient.

Tab

Use the **TAB** key to move forward from one entry field to the next entry field.

Use **SHIFT+TAB** to move backward from one entry field to the next entry field.

Name Entry

If the name of the party is a company name, check the Company box and the Last Name, First Name, MI fields will be merged into one name field, and the SSN label will change to a TIN label. If an individual's name, simply enter the appropriate names in each field (Last, First & MI).

Dollars

Dollar amounts should be entered without the commas or dollar sign in the amount. Impact Online will format the amount accordingly. If there are cents in your dollar amount, enter the decimal then the cents amount.
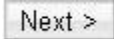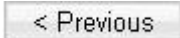
Required Fields

Required fields are highlighted in yellow on the data entry screens. If you fail to fill a required field, you will not be able to leave the screen. The Company has flexibility on which fields it can set to be mandatory, so some screen shots in this documentation may not reflect the options selected in your particular environment.

Order Entry Window Tools

Navigation through the Order Entry Wizard's windows is managed by a group of controls that are available on each window of the wizard. These controls allow for moving through the wizard's screens in order (forward or back) as well as providing the ability to jump to any section of the wizard needed. The tools include:

Next > - Advances user to the next page in the wizard, which may be in the same or a different section.

< Previous - Navigates to the wizard page prior to the one a user is currently on. This may be in the same or a different section.

Next Section >> - Advances user to the next section of the wizard.

<< Previous Section Navigates you to the section prior to the one a user is currently on.

Jump to Section
Order Details
Order Details
Property Details
Buyers
Sellers
Listing Agent
Selling Agent
Lenders
Seller Payoff
Buyer Payoff
Other Agent
Other Party
Attorneys
Accommodators
Title Officer
Prelim Distribution (1/2)
Prelim Distribution (2/2)
Next Section >>

- Allows you to jump to any section at any time during the order entry wizard.

X - The close button will attempt to save any data entered and display the review page.

Order Entry Wizard Sections

The following several pages will detail the screens that the **Order Entry Wizard** will take you through. On these screens you will provide as much data as possible about the order you are originating.

Order Details

The **Order Details** window is the first window of the **Order Entry Wizard**. On this window, you will provide the high level information of the order. **Escrow Branch**, **Escrow Officer** and **Marketing Rep** will auto-populate if you have defaulted this information on your account. (see the **My Account** tab section).

One helpful feature of Impact Online is the **Transaction Type** dropdown. This dropdown controls the transaction-specific information windows that appear in the wizard. This means that you will only enter information that relates to the **Transaction Type** selected. The **Role(s)** available to select for yourself (as a party to the file) are based on the transaction type selected as well. Once the Role(s) option(s) is available, check the appropriate box to identify your role in the order.

For the purposes of this documentation, we will be looking at the wizard for a Residential Refinance order. The same methodology applies to Residential Sale orders with the exception of the addition of windows to accommodate the parties associated with a sale transaction.

Click on the **Next** button to move to the **Property Details** screen.

Property Details

The **Property Details** screen allows you to enter the property information for the order. Many fields on the property details screen can be set to be required, but may not be – again, it is up to the Company. It is always a good idea to enter as much information on the transaction as you have, regardless of whether it is required data or not.

A freeform text field is also provided to add any **Special Instructions** to the order.

Borrower Details

Impact Online gives you the ability to enter up to eight (8) Borrowers/Buyers.

Be sure to enter an individual's name as labeled on the fields: **Last Name**, then **First Name**, then **Middle Initial**. However, if you are entering a company or trust name, you would select the **Company** checkbox and the name fields will blend into one field to accommodate a company or trust name. Another change users will see when selecting the **Company** checkbox is the **SSN** field changes to a **TIN** field.

NOTE: On all party windows there is no information that is required. However, if any information (address, phone, email) is entered, the Name/Company Name field becomes required. Users cannot save a party without completing the **Name** field.

Click on **Next** to add more Borrowers/Buyers; click on Next Section once you have entered all of the Borrowers/Buyers for the order. If you click Next on a blank screen, you will be taken to the next section.

If the **Transaction Type** had reflected a sale, **Seller Detail** screens (up to eight) would have been presented prior to the Borrowers/Buyers.

Lenders Details

The **Lenders Details** window allows the user to enter lender and loan information, including **Type of Financing**, **Loan Amount** and **Loan Number**. The wizard allows information for three (3) lenders to be entered.

The icons on the right side of the screen let the user [icon] **Populate Fields with Default Party Data**; [icon] **Lookup a Party to Populate Fields With**; or [icon] **Clear the Fields**.

The third window of the **Lender Details** window can be used for a third lender or for information on the mortgage broker (note the heading change on the third lender screen, shown below).

Buyer (Borrower) Payoffs

You will enter the **Buyer's Payoff** information into this screen (Buyer and Borrower are synonymous in this context). There are two (2) windows available for two (2) payoffs to be entered when using the wizard. The **Name** (Lender's name) field is required. If the **Payoff Amount** and/or **Reference Number** (loan number) are available, the information can be entered into the fields provided on this window. This information, like the other order information, will be available to the escrow officer when they review the file in Impact/SQL. Providing this information at open order time can eliminate the need to contact the escrow officer to provide the information and they can proceed with ordering payoff information from the lender(s).

Other Party

The **Other Party** window provides room for you to enter information on any other party that may be part of the transaction or that may receive information on this particular file. Standard contact information, which is collected for other parties of the file, can be easily entered and submitted to the Title and Escrow Company.

Attorneys

Impact Online provides for two (2) **Attorneys** to be placed on a file, if required.

Accommodators

Impact Online provides the ability to enter up to two (2) **Accommodators** if the order is a 1031 exchange.

Title Officer

If the system is configured to present the Title Officer screen, it will follow the Accommodators screen.

If the Title Officer is one from the Title and Escrow Company, click on the radio button at the top of the screen and select a name from the dropdown immediately below. If a Title Officer from another company is to be identified, click on the **Other Title Officer** radio button and enter detail on the title officer.
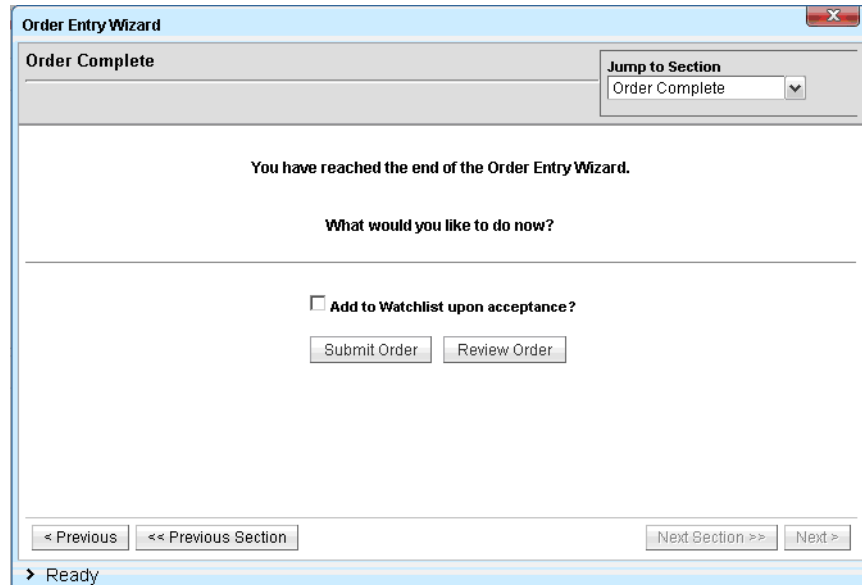
Prelim Distribution

If the system is configured to present the Prelim Distribution screen, it will follow the Accommodators or Title Officer screen.

This screen is used to identify which parties to the file should receive how many copies of the Preliminary Report, CC&R's and Other Documents; the distribution method requested is selected with the dropdown boxes under the **Via** heading. Parties who have been identified with have their names next to the party headings. A second screen allows other parties to be added to this listing.

Order Complete

Once all the information is entered into the wizard, this is the last window that will be displayed. From this window, you can navigate back to the previous screen or section. You can also review all order information or submit the order and add it to your **Watch List** upon acceptance by the escrow operation.

Click on the check box in front of the **Add to Watchlist upon acceptance?** question, if you wish for that to happen.

Click on the **Submit Order** button to submit the order to the Title and Escrow Company.

Clicking the **Review Order** button will display the **Order Entry** tab, where the wizard was started, showing **Order Details**, **Property Details** and **Order Parties** sub-windows. The functionality of that window is discussed on the next pages.

Order Entry Tab

If you choose to review the order from the **Order Complete** window, you are taken to the **Order Entry** tab with the information displayed. This is also the screen displayed if you cancel out of the Open Order Wizard. This screen is comprised of three sections: **Order Details**, **Property Details** and **Order Parties**. Each section permits the user to navigate to that area of the Open Order Wizard.

Note: You will only be able to make modifications to an order if the Title and Escrow Company has not accepted the order and it still reflects on your Orders Pending tab. Once the order is accepted, no editing of the information is possible through Impact Online.
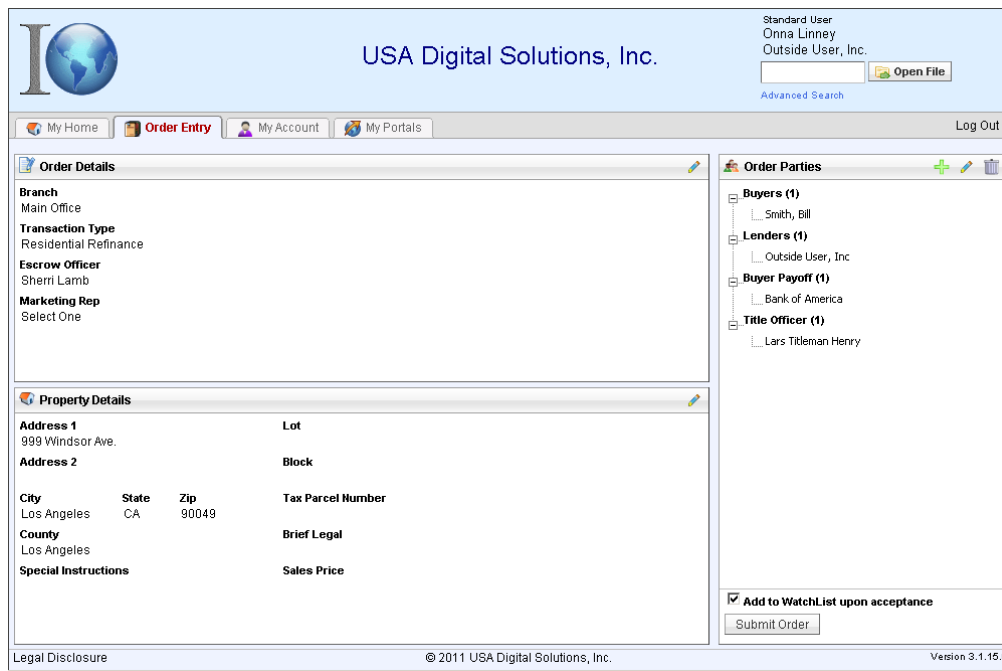

Each detail area has tools associated with it. These tools allow the user to make necessary modifications to the information reflected. The **Order Details** and **Property Details** sections of this window only allow for the editing of the existing information. The **Order Parties** section allows for the addition, modifying and deleting of parties to the order. The icons and their function on this window are as follows:

|	
	Edit section details
	Displays the wizard and allows you to add another party to the order
	Deletes the selected party from the order

At the bottom of the **Order Parties** section there is a checkbox. If you did not ask for the file to be added to your **Watch List** upon acceptance, on the **Order Complete** window, you have the opportunity to select this checkbox and then submit the order from this screen.

NOTE: Your order is not saved and committed until you submit the order. If you attempt to move away from this tab to go to another tab in Impact Online you will receive the following prompt:
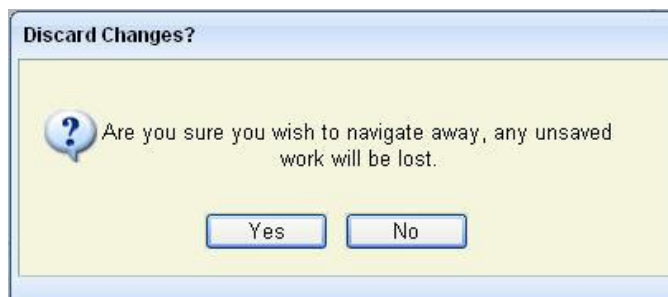
If you wish to submit the order, you must click **No** and then click the **Submit Order** button on the bottom of the **Order Parties** section of the **Order Entry** tab.

Once you submit the order to Title and Escrow Company, you will see the following prompt:
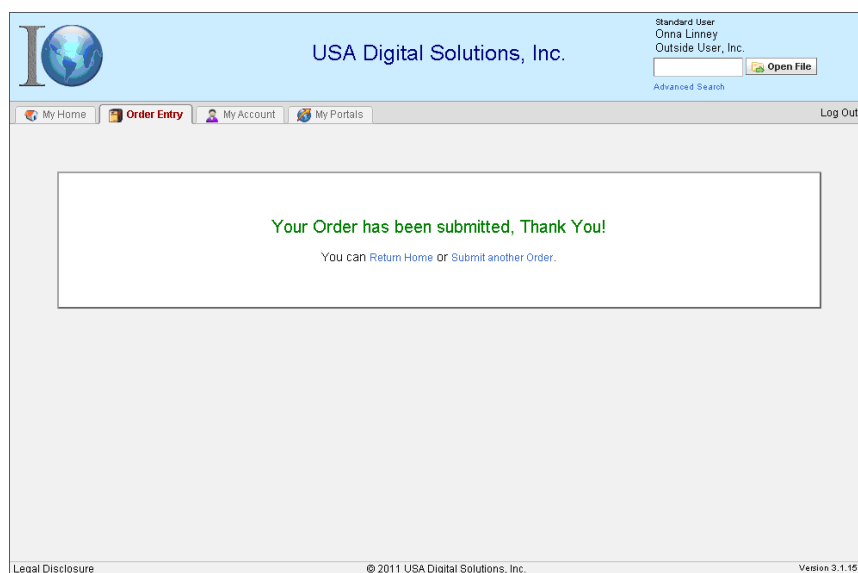
You will then be given the opportunity to open another order or return to the homepage of Impact Online. Your order (assuming the Title and Escrow Company is not configured to automatically accept orders) will be reflected on the **Orders Pending** tab of the **My Home** page. If configured to automatically accept orders, the system will return a file number on the above screen.

Orders Pending

The **Orders Pending** tab displays any orders that you have submitted to Impact/SQL that have not been accepted. Once you have completed the **Order Entry Wizard**, the file is sent to a queue for acceptance and entry into the Impact/SQL application. While an order is pending, you still have access to the information to make modifications and additions to the order information, if necessary.

The screen below reflects the **Orders Pending** tab with orders entered and waiting for acceptance.
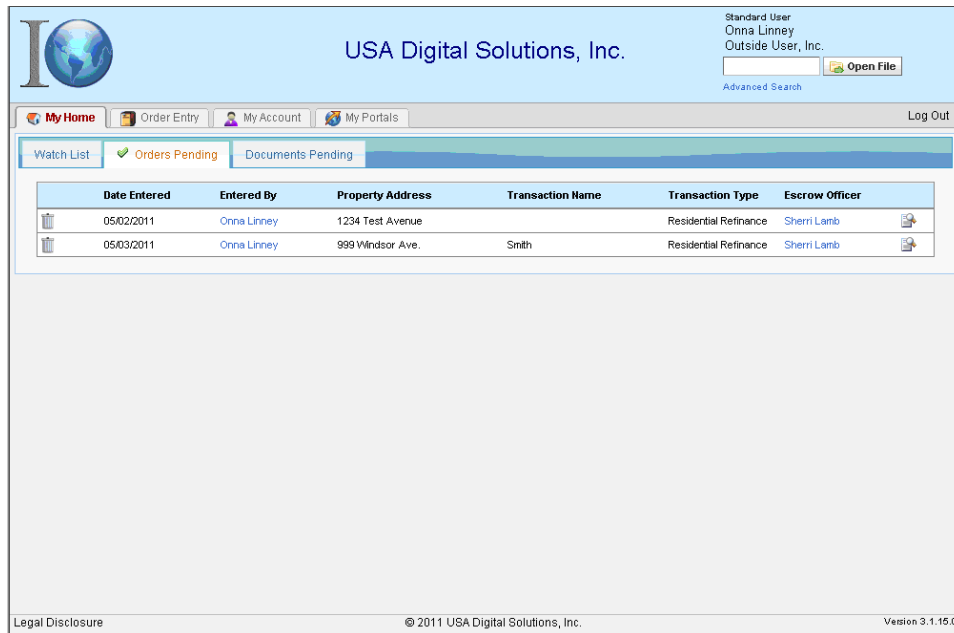
The grid lists the following information on each file displayed:

- **Date Entered**
- **Property Address**
- **Transaction Type**

- **Entered By**
- **Transaction Name**
- **Escrow Officer**

While waiting for an order to complete the acceptance process, you can still access the file information to add or modify information on the order. This is accomplished by clicking the View Pending Order icon. This will open the **Order Entry Wizard,** starting at the **Order Details** screen where modifications can be made. **(This wizard was described earlier in the manual.)** If you wish to delete the order, so that it will not continue with the acceptance process, you can click the icon to delete the order.

As orders are accepted by the Title and Escrow Company they will disappear from the **Orders Pending** tab. Depending on the option selected when the order was opened, the order may or may not appear on your **Watch List**.

File Summary

In the explanation, earlier in this manual, of the **Watch List** screen, the icons that might appear on the right side of the listing of files were mentioned.

- this icon will take you to the **File Summary** window for the file

- this icon, if visible, indicates there are documents available for viewing, and clicking on the icon will take you to the **Documents** window, where the documents will be listed and the Acrobat PDF icon on that window will open the document selected for viewing.

- this icon, if visible, indicates that there is **Tracking** information available for viewing for the file.

Upon clicking on the **File Summary** icon, for a particular file, a window like that shown below will be presented.

Across the top of the screen are action icons.

Print – generates a file summary report that can be printed.

Email – will prepare an email of the file summary data and let the user select who to send it to. Documents, if available, may also be attached to the email.

Remove From Watch List – to remove a file from your Watch List, from this screen, click on the trash can icon. You will be asked to confirm the desire to delete the file.

Upload File – this icon will initiate the Document Upload function, which will be described later in this documentation.

View Email Log – this icon will present a listing of email sent out of Impact Online for the selected file.

Refresh – this icon will re-poll the Impact/SQL database and bring in current data on the file.

Below the action icons, basic file information is presented: **Escrow Number**, **Escrow Officer**, **Branch** and **Transaction Type**. Below that information, there are five tabs of additional information: **Summary**, **Title Info**, **Tracking**, **Prelim Distribution** and **Documents**. Not all may be presented, depending on system configuration. Each will be discussed below.

Summary Tab
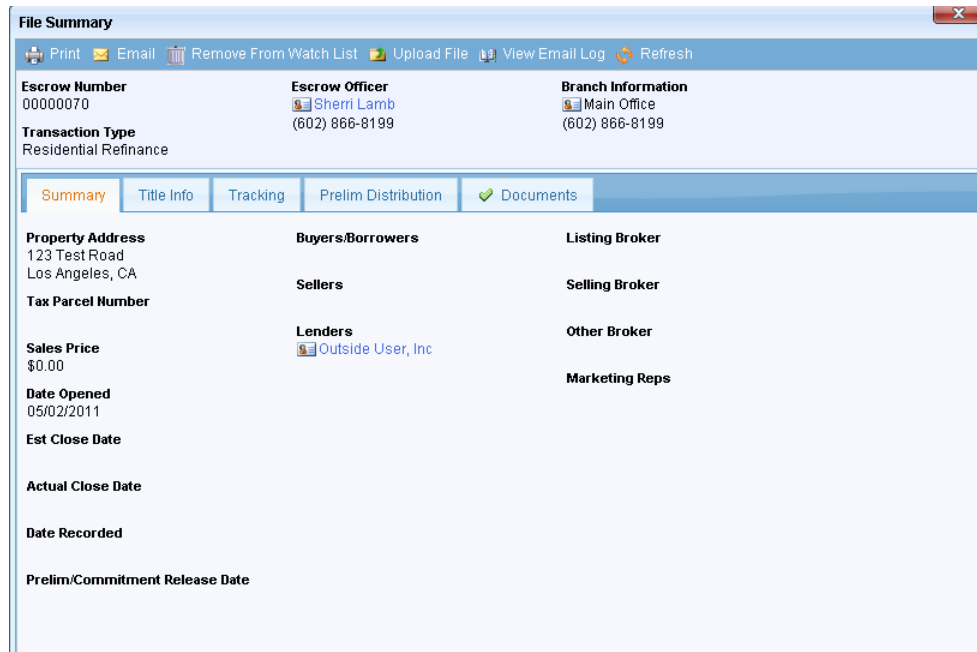
The **Summary** tab, on the File Summary window, displays the top-level order information. This information is read-only and cannot be changed. Once an order is on your Watch List, it is not available for any modifications in Impact Online. If any modifications or deletions of this information are necessary; you will need to contact the Title and Escrow Company to which the order was submitted.

Title Info Tab

The **Title Info** tab will present information, if available in the database, on the status of the title work for the file. Information that may be presented include: **Searcher's Initials**, **Date the file went into Searching**, the **Examiner's Initials**, **Date the file went to the Examiner**, the **Policy Typist's Initials** and the **Date the policy(ies) were Typed**. This data must be entered by the Title Department as the file moves through the process.

Also, a **Pre-Audit Settlement Statement** can be generated from this screen.

Tracking Tab

The **Tracking** tab, if available, will present whatever tracking events the Company has configured the file for. The Tracking tab will present with a ✅ green checkmark if there are entries on the tab. The listing will present **Descriptions** of the events, the **Date Ordered** (started), the **Date Received** (completed) and any **Comments** the Company's employees have entered related to the events.

Prelim Distribution Tab

The **Prelim Distribution** tab, if available, will present whatever document distribution instructions have been recorded for the file. The Prelim Distribution tab will present with a ✓ green checkmark if there are entries on the tab. The number of Preliminary Report copies, CC&R copies and Other Doc copies will be indicated, for the parties specified and the distribution method will be shown.
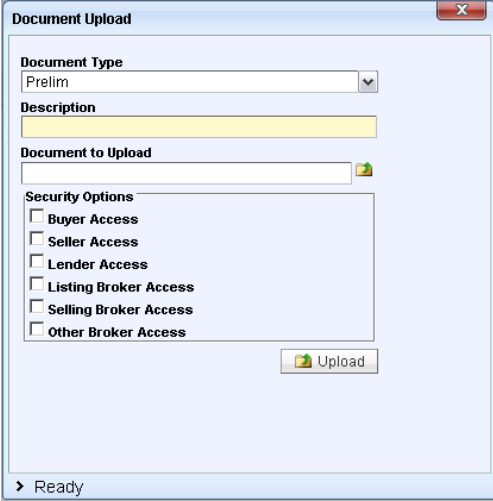
Documents Tab

The **Documents** tab will display any documents that have been uploaded to Impact Online, either by you or by the Title and Escrow Company. Currently the only file format accepted for upload to Impact Online is PDF format. Additional file types will be made available in the future.

Documents that you have uploaded but which have not yet been accepted for access by the Company, will be highlighted in yellow on the listing.

Access to these documents is controlled at the time of uploading. Impact Online users and Title and Escrow Company personnel will be able to grant rights to parties of the transaction at the time of uploading documents. These rights determine which documents are displayed when the logged-in user accesses the **Documents** tab.

Impact Online users will be able to click on the 📤 **Upload File** icon, on the mini-toolbar, to upload documents and be taken to the **Document Upload** window for this function.

The **Document Upload** window gives you the ability to select the **Document Type** being uploaded, type a **Description** of the document, browse local and network drives for documents to upload, using the 📤 browse icon next to the **Document to Upload** field, and define **Security Options**, in terms of access, for the document.

Once you have completed the **Document Upload** window, clicking **Upload** will process the document and send it off to the Title and Escrow Company for approval. Once the document has been approved, it will be removed from the **Pending Documents** list and be available on the **Documents** tab, for viewing, by the parties granted access via the **Security Options** selections made at uploading.

In the screen shot below, there are two documents available to the current user. The first, highlighted document, is one the current user uploaded, but which has yet to be approved. The second, not highlighted document has been approved for viewing by the current user.

Clicking on the 🗋 **Click Here to View Document Information icon**, next to a pending document, will present a screen, like the one to the right, on which the user can review the settings made for the document that he/she uploaded. The Document Type and Description change be edited and the document can be viewed. The Security Options can also be changed, if need be.

If the user that uploaded a document wants to delete it before it is approved, they can use the 🗑 **Click Here to Remove Document** icon, in front of the pending document.

Clicking on the 📄 **Click Here to View Document** icon, next to an approved document, will open the document for viewing in Adobe Reader.

Documents Pending Tab

The **Documents Pending** tab, under the **My Home** tab, displays all documents that you have uploaded to Impact Online and which are awaiting approval by the Title and Escrow Company – as opposed to the pending documents listed on a specific File Summary, which are only those related to the one file. The window lists the following information on each document pending on the file:

- **File Number**
- **Description**
- **Published Date**

- **Document Type**
- **Document Name**
- **Uploaded by**

Clicking on the **Click Here to View Document Information icon**, next to a pending document, will present a screen, like the one discussed earlier, on which the user can review the settings made for the document that he/she uploaded. The Document Type and Description change be edited and the document can be viewed. The Security Options can also be changed, if need be.

While these documents are in a pending status, you can delete the document by clicking the 🗑 trash can icon in front of each listed document.

NOTE: Documents and access rights can only be modified while the documents are in a pending status. Once approved by the Title and Escrow Company, the documents are listed on the Documents tab of File Summary and can only be viewed.

Open File & Advanced Search

The search functionality of Impact Online allows you to search through the orders, in the Title and Escrow Company's system, that you are a party to, so you can view information on the files. There are two types of searches available in Impact Online: **Open File** and **Advanced Search**.
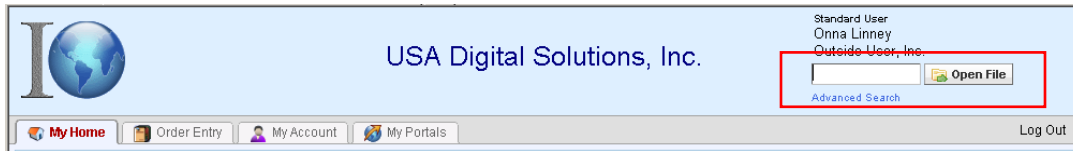
Open File

The **Open File** search box is located in the top right of all main sections of Impact Online, and is used if you know the number of the file you wish to bring up for review. Impact/SQL file numbers are up to eight (8) characters, but leading zeros can be left off. For example, to bring up file "00000070", you can enter "70". Enter the known file number in the field and click the button to perform a search. If the file number is located, and you are a party to the file, the **File Summary** screen will be presented.

If you do not have access to the file that you attempted to search for, the following message will appear onscreen:
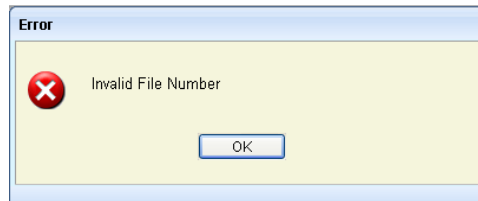

Advanced Search

If enabled, **Advanced Search** will allow you to perform a "Google"-style search where Impact Online will attempt to match up the query value entered to any order information that matches that criterion. Search results are restricted by access to file. If you are not a party to a file that meets that criterion, it will not be returned in the search results. Click on the Advanced Search link to start a search, and the screen below will be presented.

Enter your search criteria (address information, buyer or seller name, file number, etc.) in the box next to the **Search** button and click on the **Search** button to execute the search.

Once a search is launched, and results are located, which include you as a party to the file, the following **Search Results** window will appear.
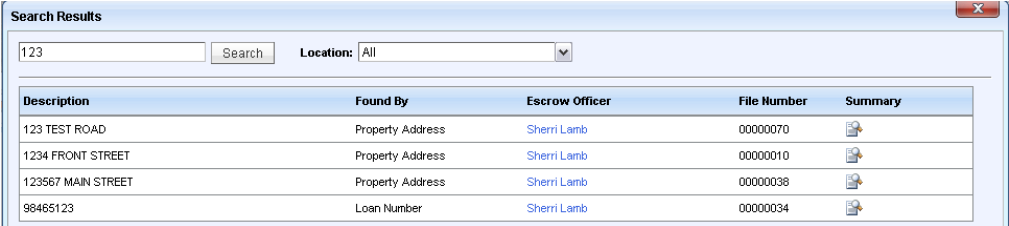
The grid displayed lists the following information on each file returned:

Description – This is the description matching the search criteria

Found By – This informs on what type of field your search was matched. The following are the different types of field matches that can appear, and you can limit your search by selecting one of these from the **Location** dropdown next to the Search field.

- Buyer/Borrower Name
- Seller Name
- Tax Parcel Number
- Subdivision
- Title File Number

- Property Address
- Base Title File Number
- Reference Number
- Loan Number
- File Number

Escrow Officer – This tells the name of the Escrow Officer associated with the file. In addition to displaying the EO's name, if the email information is available for the EO, the name will be a hyperlink and clicking it will bring up an email preconfigured with the escrow officer's email address displayed in the **To:** address field and the **File Number** in the **Subject** field. You can enter a message and click **Send** to send the email to the EO.

Summary – This column provides an icon that, when clicked, will present the **File Summary** window. (**See File Summary for additional information**)

The number of pages and items per page are presented at the bottom of the window. You will also be able to page through the list 10 items at a time by clicking on the page number or the previous and next page buttons.

If you do not have access to files that match the criteria used to search, the following message will appear onscreen.
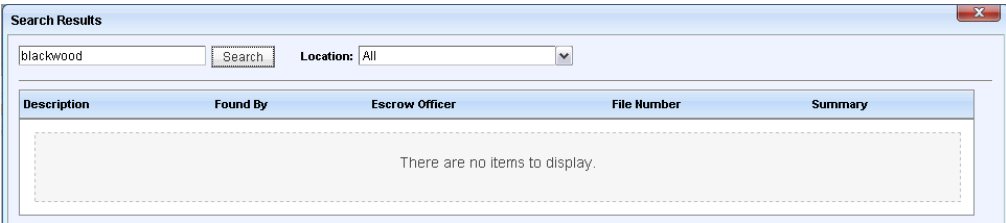
Support

Please contact your Title and Escrow Company representative for Support for their Impact Online website.