

Rexera User Guide

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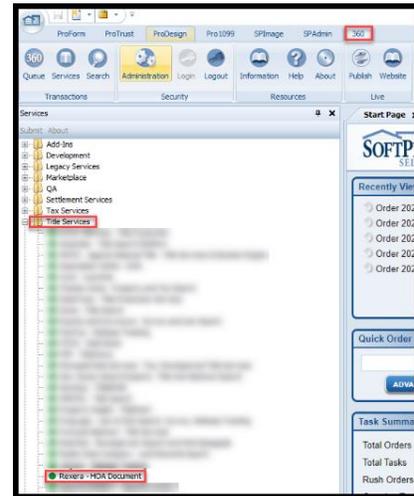
Introduction

Rexera allows agents to order HOA documents, Municipal lien searches and Mortgage Payoff via SoftPro 360. The Rexera integration with SoftPro 360 provides users with the ability to seamlessly place orders for Rexera products and receive the results of those orders within SoftPro 360. Users will be able to submit an order, track the status of their requests and receive data/documents from Rexera all from within Softpro 360.

Accessing

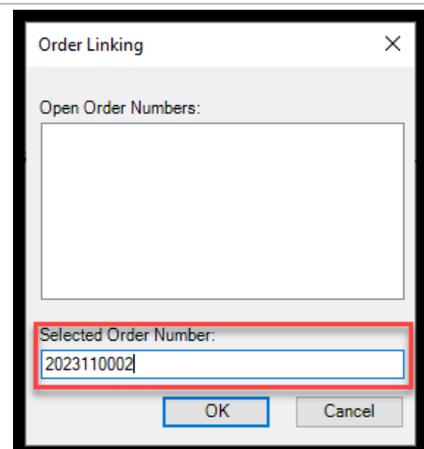
From the ProForm toolbar

1. Select the Services tab
2. Click the Settlement Services folder to expand
3. Double-click **Rexera – HOA Document, Muni Liens, Mortgage payoffs.**



Select a ProForm Order for Your Search

Each transaction must be linked to a ProForm Order. If you already have ProForm order(s) open, the Active order will be automatically linked. If you do not have an active order open, you can enter the order number in the Selected Order Number field. Once you have confirmed the order, click OK:



Logging into Rexera

The login screen requires you to enter a valid **Username** and **Password**. Clicking on the **‘Remember me’** check box will allow you to log in automatically when you launch the product in future sessions. If you do not have a valid username and password click on the **‘Reset Password’** link which will open a webpage for the user to request assistance with log in credentials. If there isn’t an established account with Rexera, click the **‘Register’** link to open the registration webpage and create an account.

Clicking on the **Login** button will continue to the **Order and Submit** Screen.

Order and Submit Screen

The **Order and Submit** screen allows the user to select the **Property** (if multiple properties exist on the order), **Legal Description**, **Product(s)**, **Closing Date**, **Due Date**, **Team**, **Prepay**, and **HOA Contact Information**. User can also Add Documents and Notes, before submitting a request to Rexera. The user can choose to order any or all of the HOA Documents, Lien Search, and Mortgage Payoff services for a given address

- **Property(s):** Information for the properties added within the ProForm order will populate into the dropdown list.
 - Changes to the property information will have to be done within the ProForm order.
- **Legal Description:** Information for the legal description added within the ProForm order will populate into the dropdown list.
 - Changes to the legal description can be done within the Rexera integration but will not overwrite the ProForm order.
- **Product(s):** Select product checkboxes for the products to be submitted with the request.
- **Closing Date:** Information for the closing date added within the ProForm order will populate into the field.
 - Changes to the closing date can be done within the Rexera integration but will not overwrite the ProForm order.
- **Due Date:** User can change the due date to submit with the request.
- **Team(s):** User can change the team to submit with the request.

- **Prepay:** User can select a prepay option for the service(s) requested.
- **HOA Contact Information:** Contact information for the HOA added within ProForm will populate into the field.
 - Changes to the HOA contact information can be done within the Rexera integration but will not overwrite the ProForm order.
- **Notes:** Add a note to send with your request (Add to ProForm Notes is selected by Default)
- **Add Documents:** Click this link to add documents to be included in your request to Rexera. See the Attaching Document(s) section of this guide for more detail.

Mortgage Payoff Information Screen

The Mortgage Payoff Information screen allows the user to send the **Payoff Lender Name**, **Payoff Loan Number**, **Payoff Instructions**. The last 4 digits of the sellers SSN will be sent in the background with the request to Rexera.

- **Payoff Lender Name:** Information for the payoff lender name added within the ProForm order will populate into the dropdown list.
 - Changes to the payoff lender name can be done within the Rexera integration but will not overwrite the ProForm order.
- **Payoff Loan Number:** Information for the payoff loan number added within the ProForm order will populate into the dropdown list.
 - Changes to the payoff loan number can be done within the Rexera integration but will not overwrite the ProForm order.
- **Payoff Instructions:** User can enter any additional payoff instructions to send with the request to Rexera.

Payoff Lender Name	Payoff Loan Number	Payoff Instructions
Wells Fargo, WF	123456	Test

Attaching Document(s)

The **Add Document(s)** screen allows the user to attach documents before submitting the request to Rexera.

After selecting documents, click **Close**:

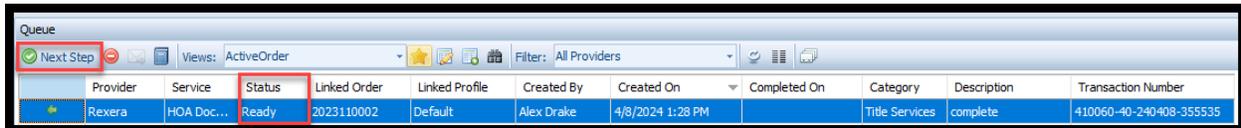
- **Browse:** Browse to find documents to submit.
- **Attachments:** Attach documents from the ProForm order.
- **Documents:** This button is not applicable to Rexera transactions currently.

Name	Type
Document.pdf	HOADocuments

- **Rename:** Rename the documents before submitting.
- **Delete:** Delete documents from the list of documents before submitting.
- **Type Column Dropdown:** Designate which product the document will support.

Accepting Data & Document(s)

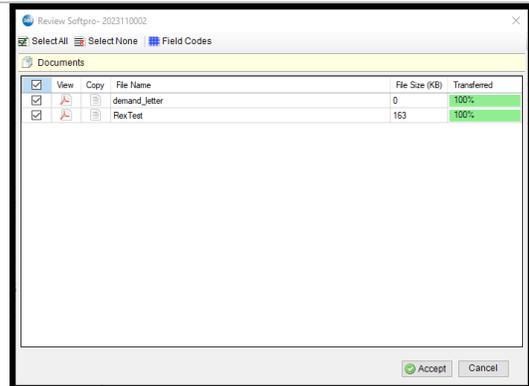
In the 360 queue the transaction status will show as **Ready** when data and documents have been sent from Rexera. The transaction status will be **Ready** which indicates a response has been received and is ready to be reviewed. The user will click **Next step** to review the data and documents.



Review Screen

The Review screen allows the user to view, copy, and accept documents from Rexera into the Select order.

- **View:** View documents sent from Rexera.
- **Copy:** Save a copy of the document to the clipboard.
- **Accept:** Attach the document(s) to the Select order.

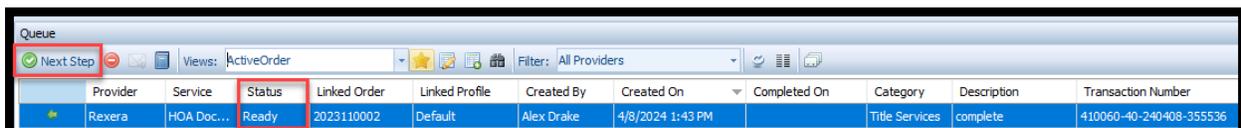


The accepted documents will be saved as attachments section of the ProForm order.

Updating a Transaction

In the 360 queue you can request an update for a transaction that has already been Accepted.

1. Click on Next Step.
2. In the Update Order and Submit Screen enter the revised Legal Description, Closing Date, HOA Contact Information, Team, or new Due Date, if applicable.
3. Add a Note or Documents to submit with your update request, if applicable.
4. Click Update.



Order and Submit

Property: 175 S Arizona Ave Test123, San Antonio, TX 78268

Legal Description:

Products

HOA Documents

Demand/Status Letter Resale Certificate/Estoppel HOA Documents

HOA Financials Lender/Condo Questionnaire Sufficient Funds Affidavit

CC&R HOA Review CIC Document

Lien Search

Solar Liens Taxes Municipal Liens

HOA Review HOA Finder Mortgage Payoff

Order Information:

Closing Date: 07/25/2024 Due Date: 04/08/2024

Team: Test-Softpro-1 - 398 Prepay: --Select--

HOA Contact Information:

Notes:

[Attach Documents](#) Add to Proform Notes