

+Get Connected.

ClosingTracker Quick Reference Guide

What You Need to Get Started in ClosingTracker

- Internet connection
- E-mail account
- Internet Explorer v.5.0 or greater
- Adobe Acrobat Reader (free download)
- User Name and Password – provided via email when we place your first file on ClosingTracker

Accessing ClosingTracker

1. You will receive an email from our company with the following:
 - a. A link to our ClosingTracker Web Site
 - b. Your login
 - c. Your assigned password
2. Click the link provided in the email and at the home page, enter your assigned login and password. The first time you log in the system will prompt you to change your password.

Forget Your Password?

Go to our ClosingTracker login page and click the [Forgot your password?](#) link. Enter your email address and the system will send your login and password to your email address.

Welcome Page

1 Menu Bar

Home – Return to Welcome page

My Files – View/Access all your files

Settings – Modify your personal settings

Help – Access to informational tools

Log Off – Exit ClosingTracker

2 Manage My Email Notifications

Control which email notifications you would like to receive.

Change My Password

Change your current password.

3 Open a New File - Open a new file online.

Order PDR - Order a property disclosure report (CA only).

4 What's New? - Access the latest documentation on ClosingTracker including current releases.

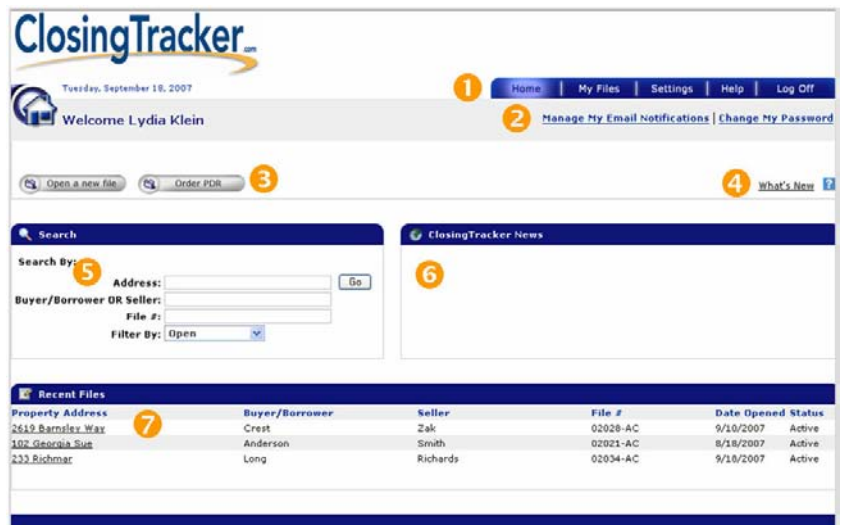
5 Search - Multiple search fields to locate files.

Enter your Address, Name or File # search criteria and click **Go**.

Select from the **Filter By** list to view **All**, **Closed**, **Cancelled** or **Last Accessed** files.

6 ClosingTracker News - News and tips for using ClosingTracker will display here.

7 Recent Files – Displays your most recent files. Click the property address link to view an individual file -OR- Click **My Files** from the menu bar to view all of your files.



ClosingTracker is provided by
University Title Company
www.utitle.com
979-260-9818

Questions? Please call Dawn Bowers
979-260-9818 ext. 131

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My Files Page

1 Search – Multiple search fields to locate files.

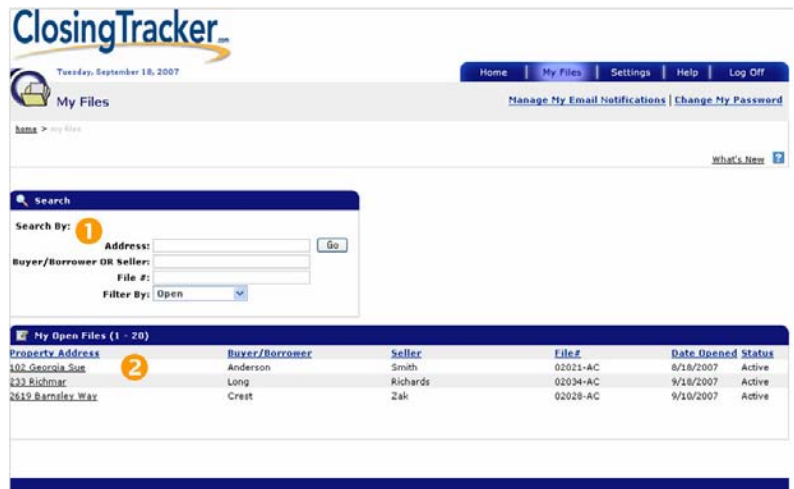
Enter your Address, Name or File # search criteria and click **Go**.

Select from the **Filter By** list to view **All**, **Closed**, **Cancelled** or **Last Accessed** files.

2 My Open Files – Displays all open files.

Click the property address link to view an individual file.

Click any of the underlined headings to re-sort the files.



File Summary Page

1 Property Info

Double-click the photo to add or change the property photo.

Click the [Send Status Sheet](#) to view, print or email a comprehensive status sheet on the transaction.

2 Documents

Click on a document title to view, print or email the document.

Click **Add a Document** to post a document to ClosingTracker.

3 Participants

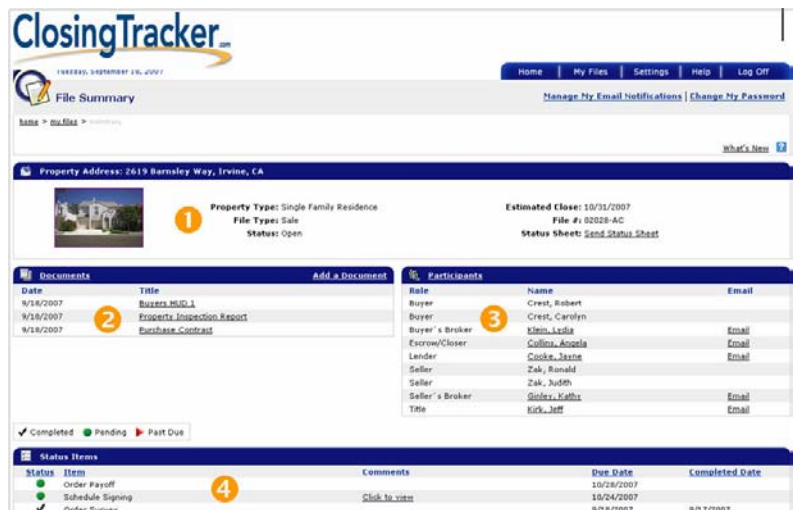
Click a participant's name to view his or her contact information and send an email.

4 Status Items

View the current status of tasks that need to be completed for this file.

Status Items are sorted by Due Date and can be re-sorted by clicking on any of the headings

View comments by clicking [Click to View](#), when available.



Settings

- **Personal Information** – Edit personal information such as your phone numbers or e-mail address.
- **Email Notification** – Control which emails you would like to receive.
- **Change Password** – Change your ClosingTracker password.
- **Profile Page Contents** – Enter text, add your photo and view your personal profile page.