



REOTrans
-com

Agent Manual

Getting Started with the REOTrans Marketplace System *An Overview of Functions*

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Overview

This Manual covers the standard functionality about how to work with the REOTrans (RT) Marketplace software. **Note:** This document is not Seller/Lender-specific. Each Lender's configuration is unique. The RT Marketplace, however, is used by Agents who may be working with multiple Lenders on multiple properties. The RT Marketplace platform is a task-based Workflow system that enables all parties handling REO-related tasks to send and receive tasks and deliverables. This software is designed to enable Lenders to manage the REO process with all internal Lender roles as well as with their Agents and vendors.

When you setup an Agent account, you provide the system with your email address. When you receive a listing, you will be alerted by email at the provided email address. This email begins the Workflow series of tasks you will be required to complete for the subject property. You must complete all assigned tasks. Upon completion of a task, depending on what was entered, you may receive additional tasks, or, the Workflow may route tasks back to your Lender for them to complete.

Upon completion of this module, you will be able to:

- Log-in to the REOTrans (RT) Marketplace
- Identify the elements of the Home Screen
- Identify the elements of the Workflow Menu
- Successfully work with Tasks in Property View
- Successfully work with Tasks from the Workflow Menu
- Upload single and multiple files in the RT Marketplace
- Work with messages in the RT Marketplace
- Successfully utilize the Agent Menus
- Submit and manage offers in the RT Marketplace
- Access and utilize the File Library
- Manage your information in the RT Marketplace
- Utilize the Member Benefits menu
- Identify the benefits and advantages of Agent Certification
- Successfully access available BPO requests through the BPO Posting Board
- Successfully troubleshoot any issues you encounter while working in the RT Marketplace

System Requirements

- Web Browser: Internet Explorer v. 6.x or 7.x. No other browsers are supported at this time.
- Adobe Acrobat Reader v. 7.0 or above. **Note:** to test compatibility with your current version of Adobe, log in to REOTrans and click the Adobe test link the Main Screen, after you have logged in. You can also click on the Adobe link to download the latest version if your version is out of date.
- MS Word (.DOC, .DOCX)
- MS Excel (.XLS, .XLSX)
- Photos must be in .JPG format and must be less than 400kb in size.
- Bulk File Uploader requires Adobe Flash 9.

Logging into REOTrans

1. Open Internet Explorer and type in the following address in the address field: <http://www.reotrans.com> and press **Enter**.
 - The REOTrans Marketplace Login Screen appears.

2. Enter your email address and password. (This is the email address and password you used when you created this account)
3. Click the **Login** button
 - The main REOTrans screen appears with five menus:
 - Workflow
 - Agent Properties & Offers
 - BPO Posting Board
 - Manage Information
 - Member Center

Logging out

1. To ensure the security of your account, click the **Logout** button in the upper right corner of the main screen.
2. As an added security measure your account will automatically time out after four hours of inactivity. This security feature requires you to log back into REOTrans.



Where to Go to Get Help

There are various levels of support available to you should you have questions regarding the use of the RT Marketplace.

1. Review the [Troubleshooting](#) section of this document.
2. This manual covers generic functionality but is not Lender specific. For process questions or task-specific questions that may be unique to your Lender's configuration – go to your Lender (contact the Asset Manager) for the property.
3. For more complex system questions, please visit our online **Help** function containing our Knowledge Base of frequently asked questions. Also within this section is access to our online Chat, Customer Support email addresses and phone support numbers.

Home Screen

1 Workflow Menu

This menu has links to:

- **Offers Need Response** – Click this link to view and respond to Lenders’ counter-offers.
- **Assigned Tasks** – Click this link to view a listing of all tasks assigned to you for all your active properties.
- **Messages** – Access the Messaging system to read and reply to current messages.

2 Agent Properties & Offers

This menu has links to:

- **My Properties & Offers** – Access a list of all the properties and offers you are currently working on.
- **Place a New Offer** – Use this feature to submit an offer on one of the properties in your pipeline.
- **Post a property** – Use this feature to post a property on our foreclosure listing service. NOTE: The property must be an REO, must be in an MLS, and you must be the Listing Agent.

Home Screen

The screenshot shows the REOTrans Home Screen. At the top, there is a navigation bar with links for Buyers, Agents, Sellers, Midsourcers, Vendors, About, Help, and My Account. A user profile for 'user: B. AGENT' is visible with a Logout button. Below the navigation bar are several menu items: Workflow (0 Offers Need Response, 0 Assigned Tasks, Messages), Agent Properties & Offers (My Properties & Offers, Place A New Offer, Post A Property), BPO Posting Board (Available BPOs, My BPOs, Change Settings), Manage Information (Edit Account Information, My Buyer Alerts, My Coverage Areas), and Member Center (Agent Certification NEW, View Member Only Discounts). A 'my account' section is highlighted. The main content area contains a notification about accepting listings outside of 90250, with a link to 'Enter your Coverage Areas today!'. It includes testimonials and a reminder to update E & O Insurance Information. There are also links to test online PDF forms and a requirement for Adobe Reader 7.0 or above.

1 BPO Posting Board

This menu has links to:

- **Available BPOs** – View a listing of Broker Price Opinion (BPO) orders available to be accepted and BPOs already accepted by Agents.
- **My BPOs** – View a listing of the BPOs you are currently working.
- **Change Settings** – Identify whether you want to receive email alerts when BPOs are posted.

Home Screen

1 **Manage Information**

This menu has links to:

- **Edit Account Information** – Update your name, address, phone number, email address, password, security questions, and email options.
- **My Buyer Alerts** – Set your preferences to be notified when new properties are posted in your coverage area.
- **My Coverage Areas** – Identify which ZIP codes you do business in.

2 **Notices Area**

This is a dynamic area where you will receive helpful information:

- **Systems Notices** – Information and helpful hints regarding system functionality.
- **Account Notices** – This example shows an alert that the agent is missing E&O insurance information.
- **Helpful links:**
 - This screen provides links to test your current version of Adobe Acrobat for compatibility with the RT Marketplace. You may also download the latest version of Adobe Acrobat from here as well by clicking on the **Get Adobe Reader** button.
 - There are also links to add additional coverage areas, manage display options (select billing options for account comments, photo and bold text), change photo or comments.
 - Be sure to keep all your licensing and insurance information up to date.

Home Screen

REOTrans.com

Buyers Agents Sellers Midsourcers Vendors About Help My Account

user: B. AGENT Logout

Workflow
0 Offers Need Response
0 Assigned Tasks
Messages

Agent Properties & Offers
My Properties & Offers
Place A New Offer
Post A Property

BPO Posting Board
Available BPOs
My BPOs
Change Settings

Manage Information
Edit Account Information
My Buyer Alerts
My Coverage Areas

Member Center
Agent Certification **NEW**
View Member Only Discounts

→ my account

Do you accept Listings outside of 90250?
[Enter your Coverage Areas today!](#)

By having a REOTrans account, your office zip code is automatically included free of charge in Lender's searches for new Listing Agents.

For \$.03 cents per day you can enter your other Coverage Area zip codes. **0 listings were assigned through REOTrans last month.** Make sure you show up when Lenders assign Listings in your area. This is the most cost effective advertising you can do to receive new REO Listings.

"I signed up three weeks ago and just received a listing."

"I handle many properties through REOTrans but just received a listing from a new lender I'm not currently working with."

"We spend hundreds a month on print ads and can't tell if they help. This is much cheaper and I can tell when I get listings from it."

You are missing E & O Insurance Information. [Click here](#) to update the Information.

Test your compatibility with our online PDF Forms - The REOTrans system makes extensive use of online PDF Forms. Please take a few seconds to click the "Test PDF" link and test your system's compatibility with these forms. [Test PDF](#).

Adobe READER 7.0 or Above REQUIRED
In order for you to successfully complete the online forms that the lenders require, you will need to have at least Adobe READER 7.0 installed on your computer.

Adobe Get Adobe Reader

1 Member Center

This menu has links to:

- **Agent Certification** – Enroll in Agent Certification Courses to improve your skills in using the REOTrans Marketplace.
- **Member Only Discounts** – View advertising partner discounts and offers made exclusively to REOTrans users.

Workflow Menu

Workflow
0 Offers Need Response
2 Assigned Tasks
Messages

If you have tasks assigned to you, hover your mouse over the “**Assigned Tasks**” text which turns the text into a link. Click that link to view your Assigned Tasks. **Note:** If there are no offers or tasks, this link will not be active.

- **# Offers Need Response** indicates the number of new offers or counter-offers which you have received from a Lender.
- **# Assigned Task** indicates the total number of tasks for all the properties assigned to you that need your attention.
- **Messages** link takes you into the REOTrans internal messaging system where you can read and reply to messages. These messages may be sent to you from asset managers or may be system generated.

Tasks

Assigned Tasks

1. Click on the **# Assigned Tasks** link to view all open tasks currently assigned to you.
 - A list of your assigned tasks appears.

REOTrans.com

Buyers Agents Sellers Midsourcers Vendors About Help My Account

user: B. AGENT Logout

Workflow: 0 Offers Need Response, **2 Assigned Tasks**, Messages

Agent Properties & Offers: My Properties & Offers, Place A New Offer, Post A Property

BPO Posting Board: Available BPOs, My BPOs, Change Settings

Manage Information: Edit Account Information, My Buyer Alerts, My Coverage Areas

Member Center: Agent Certification **NEW**, View Member Only Discounts

(3) Unread Message(s) !

my account

All forms must be submitted online and cannot be printed, faxed in, or saved locally. 2 Records Found

Task Name	Address	City	State	Zip	Property Status	Role	Lender	Open Date	Due/Completed Date
Accept / Reject Listing	6508 OLD GATE R.	PLANO.	TX	75024	PRE-LISTED	Agent	REOTrans	08/11/2009 07:12 (0)	08/13/2009 07:12 (-2)
Determine Units	5613 BANISTER C.	PLANO.	TX	75093	PRE-LISTED	Agent	REOTrans	08/11/2009 07:25 (0)	08/13/2009 07:25 (-2)

2. Click on a Task Name to view the task and mark it complete.

1 Assigned Tasks Link

Click on this link to view a list of all the tasks you have assigned to you for all the properties you are currently working.

2 Task Name Link

Click on a task name to be taken to that task to mark it as complete.



1 Address Links

The address of a property is a link. Click on a property address link to be taken to the **Property View** which provides details about the property, including address, status, listing Agent, asset manager, Lender, and a listing of all the tasks associated with that specific property.

2 Open Date

Open Date
This shows the date and time the task was assigned to you.

Due / Completed Date

Due/Completed Date
This shows when the task is due, or was completed. This column has a color coding relating to the status of the task.

- **Green** = Open, not yet due
- **Yellow** = Warning, task is approaching due date
- **Red** = Overdue, task is late
- **Gray** = Closed, task is complete.

Helpful Hint:

You may click column headings to sort your tasks.

Workflow Menu

Tasks

Property View



TYPE ADDRESS STATUS LENDER
LENDER 5613 BANISTER COURT, PLANO, TX 75093 PRE-LISTED REOTRANS

ASSET MANAGER LISTING AGENT LIST DT CLOSE DT LIST PRICE LIBRARY MESSAGES
SALLY ASSETMANAGER BETTY AGENT TBD TBD View View(123) !

TASKS 0 0 1 1 OFFERS 0 0 0 0 0 EXPENSES \$0 \$0 \$0

All forms must be submitted online and cannot be printed, faxed in, or saved locally. 2 Records Found

Task Name	Role	Lender	Open Date	Due/Completed Date
Determine Units	Agent	REOTrans	08/11/2009 14:52 (0)	08/13/2009 14:52 (-2)
Accept / Reject Listing	Agent	REOTrans	08/11/2009 14:52 (0)	08/11/2009 14:52 (-2)

1 Dashboards

Click respective **links** to see functionality. Tasks View is the Default.

- **Tasks** = All tasks completed and those currently assigned on the subject property.
 - **Red** = Over Due
 - **Yellow** = Warning
 - **Green** = On Time
 - **Gray** = Complete
- **Offers** = All offers submitted on the subject property and their statuses
 - **Light Green** = New Offer
 - **Light Orange** = Offer in Negotiation status
 - **Light Gray** = Offer has been rejected
 - **Light Pink** = Offer is on Hold or being reviewed by Lender
 - **Green** = Offer has been accepted
- **Expenses** = All expenses submitted by Agents for the subject property
 - **Light Blue** = Newly submitted expenses
 - **Medium Blue** = Approved Expenses
 - **Dark Blue** = Paid Expenses

NOTE: Check with the lender for each of your properties to determine whether they accept expenses submitted through the Expenses feature in REOTrans.

Workflow Menu

Tasks

How to Work with Tasks

Tasks are triggered in several ways:

- By an event or completion of another task or tasks.
- By manually triggering the task by your Lender by re-opening a task for you or through triggering an Ad-Hoc Task.
- According to pre-defined schedule (date triggered).

Entering Data into Fields into the System

Some tasks require you to enter data into fields in order to complete the task.

This example shows a drop down list and a freeform text field.

1 Calendar / Date Entries



Date entries are normally entered by either typing in the date (using the required format mm/dd/yyyy) or by clicking on the **Calendar** icon next to the date field and selecting the date from the pop-up calendar. The default highlighted date is Today's date. However, you may choose any date by clicking on that date in the calendar.

2 Required Fields *

Any field that is required will be prefixed by a red asterisk. The system will not allow you to complete the task until these required fields have been completed.

Workflow Menu

Tasks

Entering Data into Fields in Online Forms

Other tasks open an online form for you to fill in data fields. The form opens up in an Adobe Acrobat window.

- Type the appropriate date into the fields throughout the form
 - Blue fields are editable. You can enter data into these fields.
 - Gray fields are hard-coded with pre-populated data. You cannot change the data in these fields.
 - Pink fields are required. You cannot submit the form until the pink fields have been completed.
- This example shows the **Personal Property Evaluation** online form (the form contents may differ by Lender) .

PERSONAL PROPERTY EVALUATION

Property Address		Date Prepared	01-16-08
745 RIVER DRIVE		Listing Agent First Name	BETTY
PINETOP	TX 77362	Listing Agent Last Name	AGENT

Furniture

Description and Condition	Location	Estimated Value
Sub Total:		0

1 Saving and Printing Forms

Forms cannot be saved to your computer but can be saved on the system to be completed later. Use the **Save and Complete Later** button at the bottom of the form. To print the form, use the Adobe print function. Some forms will auto-save every thirty minutes.

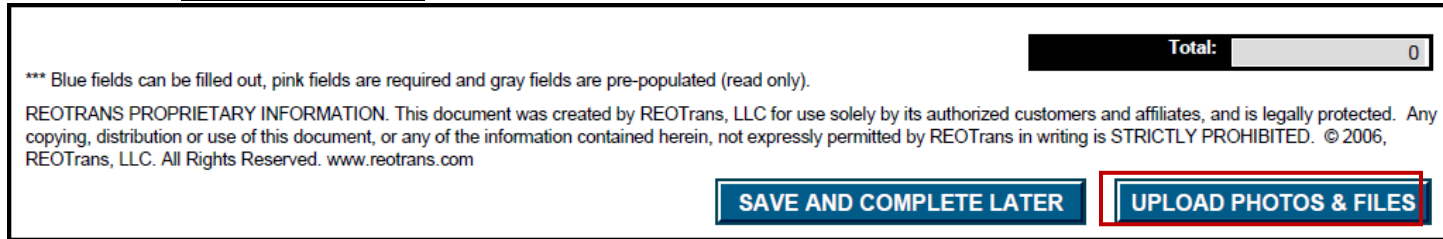
2 Auto Calculations

Many of the online forms contain auto-calculation features. For example, they add up columns or perform calculations once data has been entered.

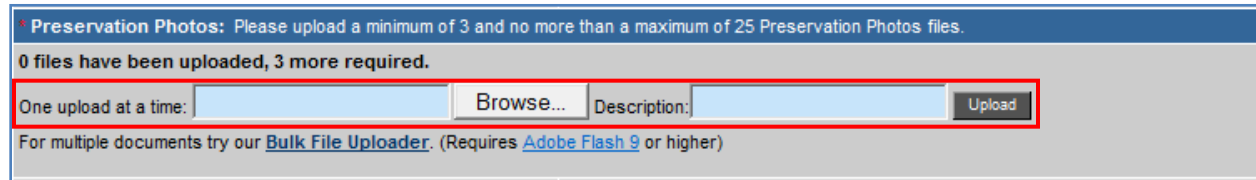
Workflow Menu
Tasks
Uploading a Single Document or Photo

Other tasks require you to upload documents or photos. This example shows you the second half of the **Personal Property Evaluation** task where you are required to upload supporting photos.

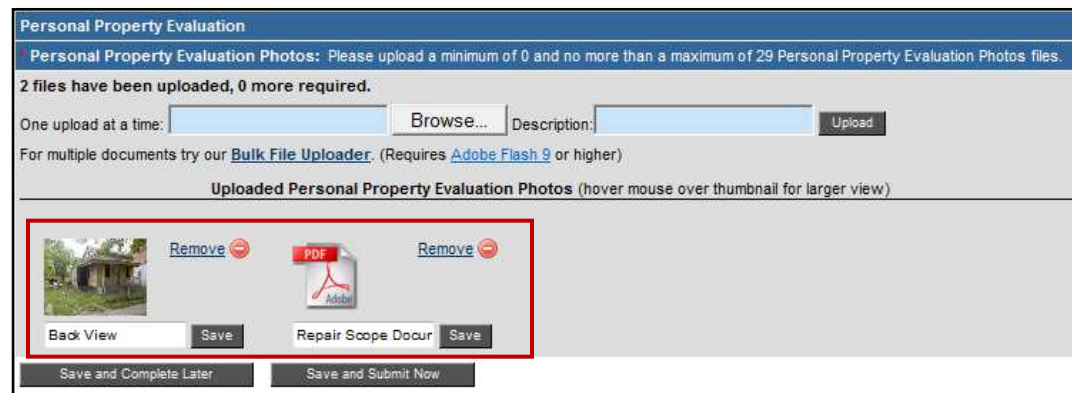
1. Click on the **Upload Photos & Files** button at the bottom of the form.



2. Click on the **Browse** button and locate the document on your computer you wish to upload. Single-click the file then click **OK**.
3. Enter the Description of the file you are uploading into the Description field
4. Click the **Upload** button.



- Each document you upload will appear on the screen.
 - To view documents click on the document to see it appear in a separate browser window.
 - To view photos, a thumbnail of the photo with the description you entered will appear. To see a larger picture, hover over the photo and a window containing a larger view will appear.



- If you have made an error and have uploaded the wrong document, you can delete the attachment by clicking on the file's **Remove** link.
- If you want to change the file's description, make the change to the **Description** field and then click **Save**.

Minimum / Maximum Uploads

Notice for this particular task there is a minimum and maximum number of photos required. You will not be able to submit this task until you meet the minimum number of files.

Supported File Formats

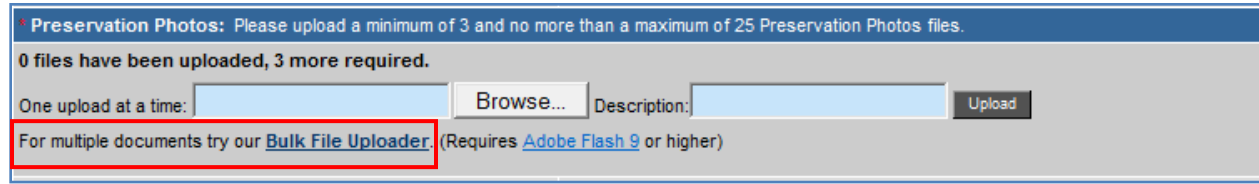
The supported file formats for upload include: PDF, DOC, DOCX, XLS, XLSX and JPG (images may not exceed 400k)

Workflow Menu

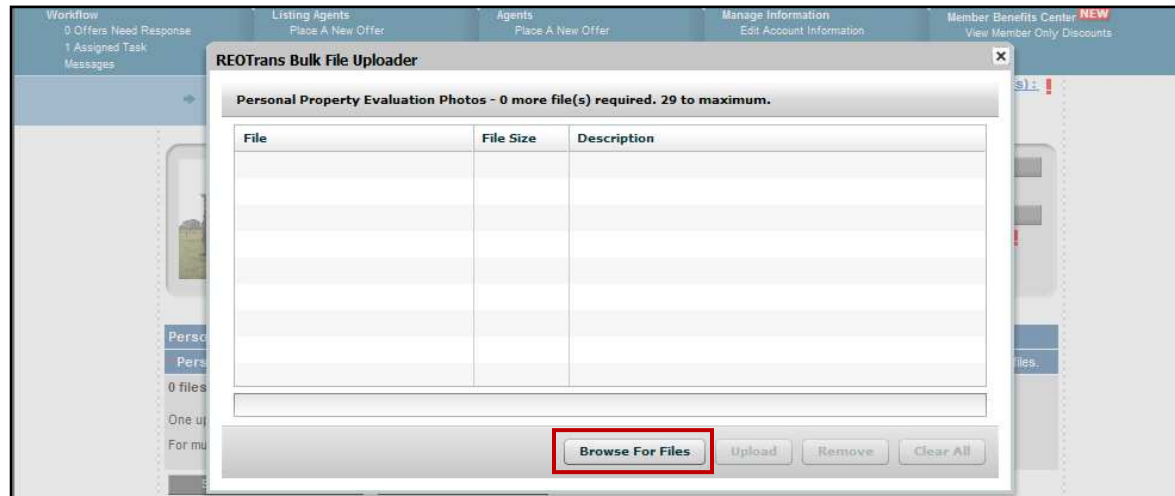
Tasks

Uploading Multiple Files

1. When working on a task that requires you to upload multiple documents you may want to use the Bulk File Uploader..



2. Click on **Bulk File Uploader**
 - The REOTrans Bulk File Uploader screen appears:



3. Click on **Browse for Files**

Software Requirement

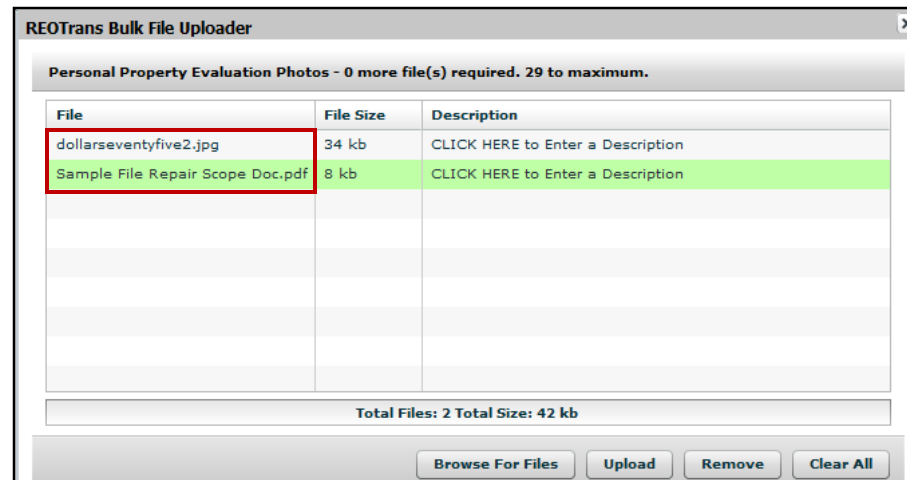
The Bulk File Uploader requires Adobe Flash 9 or higher.

Workflow Menu

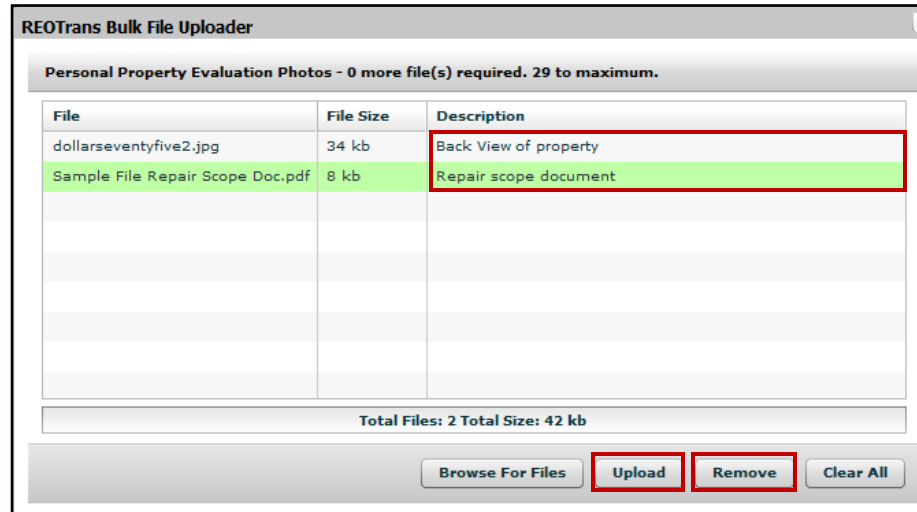
Tasks

Uploading Multiple Files

4. Navigate and select all the files you wish to upload (hold the <Ctrl> key to select multiple files).
 - The file names will appear in the **File** Column.



5. Now enter the description for each file in the **Description** column.



- To remove a file, select the file and click **Remove**.

Workflow Menu Tasks Uploading Multiple Files

- When you have finished uploading files and entering in the descriptions, click on **Upload**.
 - The task screen reflects the uploaded files.

The screenshot shows the 'Personal Property Evaluation' task interface. At the top, it states 'Personal Property Evaluation Photos: Please upload a minimum of 0 and no more than a maximum of 29 Personal Property Evaluation Photos files.' Below this, it indicates '2 files have been uploaded, 0 more required.' There is a form for 'One upload at a time:' with a 'Browse...' button, a 'Description:' text field, and an 'Upload' button. A note says 'For multiple documents try our [Bulk File Uploader](#). (Requires [Adobe Flash 9](#) or higher)'. The main area is titled 'Uploaded Personal Property Evaluation Photos (hover mouse over thumbnail for larger view)'. It displays two thumbnails: a photo of a house and a PDF icon labeled 'Repair Scope Docur'. Each thumbnail has a 'Remove' button with a red minus sign. Below the thumbnails are 'Back View' and 'Save' buttons for the photo, and 'Repair Scope Docur' and 'Save' buttons for the PDF. At the bottom, two buttons are highlighted with a red box: 'Save and Complete Later' and 'Save and Submit Now'.

Saving

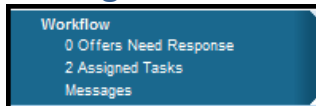
When you're finished working on or completing a task, you can choose from two options:

- Save and Submit Now** completes the task and the next task in the Workflow is triggered.
- Save and Complete Later** stores the information you've entered thus far, and stops the process in the Workflow for you to complete at a later time. Note that in some cases it will not save files that you have uploaded. It is primarily used to save data within a form.

REOTrans contains a comprehensive messaging system where all communications are stored in a message repository associated with each property. It is very important that you check the Messages section for new, incoming messages. Often the Lender will send documents to you as part of completing a task, and these documents will appear in a Message as an attachment. Messages can be viewed from Workflow screen or from the property view.

Note: You cannot delete any messages within the REOTrans system.

Messages



Working with Messages in the Workflow View

- To see any new incoming messages, click on **Messages** under the **Workflow** menu or click on the [Unread Messages!](#) link.
 - Incoming messages appear.
 - All messages will appear **Unread** (i.e. in bold) until they are marked as **Read** (turns to normal text).

		Apply to Checked:						29 Records Found	
(+/-)	All		Create Date	Address	By Person	Role	Subject	Reply	
+	<input type="checkbox"/>	<input type="checkbox"/>	08/13/2009 08:52:57	6508 OLD GATE R..	B. AGENT	System	REOTrans - New Task Assigned on: 6508 OLD GATE ROAD PLANO, TX 75024	<input type="checkbox"/>	Reply
+	<input type="checkbox"/>	<input type="checkbox"/>	08/13/2009 08:52:51	6508 OLD GATE R..	B. AGENT	System	REOTrans - New Task Assigned on: 6508 OLD GATE ROAD PLANO, TX 75024	<input type="checkbox"/>	Reply
+	<input type="checkbox"/>	<input type="checkbox"/>	08/13/2009 08:52:45	6508 OLD GATE R..	B. AGENT	System	REOTrans - New Task Assigned on: 6508 OLD GATE ROAD PLANO, TX 75024	<input type="checkbox"/>	Reply
+	<input type="checkbox"/>	<input type="checkbox"/>	08/13/2009 08:52:18	6508 OLD GATE R..	S. ASSETMANAGER	System	REOTrans - New Task Assigned on: 6508 OLD GATE ROAD PLANO, TX 75024	<input type="checkbox"/>	Reply
+	<input type="checkbox"/>	<input type="checkbox"/>	08/12/2009 11:59:12	5613 BANISTER C..	S. ASSETMANAGER	System	Closing Ordered	<input type="checkbox"/>	Reply
+	<input type="checkbox"/>	<input type="checkbox"/>	08/12/2009 11:55:21	5613 BANISTER C..	S. ASSETMANAGER	System	REOTrans - New Task Assigned on: 5613 BANISTER COURT PLANO,	<input type="checkbox"/>	Reply

1 Actions

The **Action** drop down allows you to quickly mark messages that are sent to you as **Read**, **Unread** or **Clear from Incoming mail box**. Click on the checkbox next to the message and select the **Action**.

2 Role

- System** – means that the message was generated by the system.
- Role name** – means that the message was created and sent to you by this role.

- To see a quick view of the contents of the message, click on the + sign in the left column.
 - The message expands and the text appears below the message title and the + symbol changes to a – symbol.
 - If there are any attachments you will see links (the example shows a PDF link for the listing agreement).

Messages
Working with
Messages in the
Workflow View

-	📧	01/17/2008 08:48:18	S. SELLER1	ASSET MANAGER	REOTrans: - Listing Agent Notification on: 3400 ROSE STREET PINE BLUFF , AR 71603	1	Reply
<p>Body: You have been identified as the Listing Agent on 3400 ROSE STREET PINE BLUFF , AR 71603. Your service may have requested information or forms on this property from you. Please log on to your REOTrans account and check your workflow to see the items that may have been requested. You also now have the ability to place and negotiate offers through REOTrans directly . All offers and counter offers MUST be submitted through REOTrans.</p> <p>Attachment(s):</p> <ul style="list-style-type: none"> • REOTrans: - Listing Agent No - PDF 							

- To view the entire message, click on the **Subject** link. It will open up the message in a separate window where you can see the body of the message and details of who sent it.



2 [Print] [Close]

Printable Message

Property	745 RIVER DRIVE PINETOP TX, 77362
Subject	Property is Vacant
Body	Property is Vacant
Attachment(s)	• No Attachment
Created By/Date	AGENT, BETTY - 11/08/2007 07:54:18
Notification From	BETTYAGENT@VENDORS.COM
Notification To	SALLY@ASSETMANAGERS.COM

1 *Reply to a Message* Click on the **Reply** button. **Note:** You cannot reply to System messages.

2 *Print a Message* Click on the **Print** button.

Messages

Marking a Message as Read

1. Click the checkbox next to each email message you wish to mark as being read.
2. From the **Action** drop down, select **Mark as Read**.
3. You will be prompted, **Are you sure?** Click **OK**.
 - You will see that the number of unread email messages decreases.

The screenshot shows the 'Messages' section of the REOTrans interface. At the top, there are tabs for 'Incoming' and 'Outgoing'. Below these is a search bar and a filter dropdown set to 'Action...'. A table displays three records found. The first two records are highlighted with a red box around the checkboxes in the first column. The table columns are: (+) All, Create Date, Address, By Person, Role, Subject, and Reply. The subject of the messages is 'REOTrans - New Task Assigned on: (745 RIVER DRIVE PINETOP, TX 77362)'.

(+/-) All	Create Date	Address	By Person	Role	Subject	Reply
<input type="checkbox"/>	01/16/2008 11:56:03	745 RIVER DRIVE	B. AGENT	System	REOTrans - New Task Assigned on: (745 RIVER DRIVE PINETOP, TX 77362)	Reply
<input type="checkbox"/>	01/16/2008 11:35:46	745 RIVER DRIVE	B. AGENT	System	REOTrans - New Task Assigned on: (745 RIVER DRIVE PINETOP, TX 77362)	Reply

Clearing Messages from Incoming

Messages in the Workflow view can be cleared from the Incoming box so that you can quickly reference new messages that have come in. It does not delete the messages. If you wish to view any cleared messages they still remain part of the property's message history and can be viewed at the property view level (see next section).

1. Click the checkbox next to each email you wish to clear
2. From the **Action** drop down, select **Clear from Incoming**
3. You will be prompted: **Are you sure?** Click **OK**
 - The message(s) will be removed from the inbox.
 - NOTE: The message(s) have not been deleted. You cannot delete messages.

Messages Working with Messages in the Property View

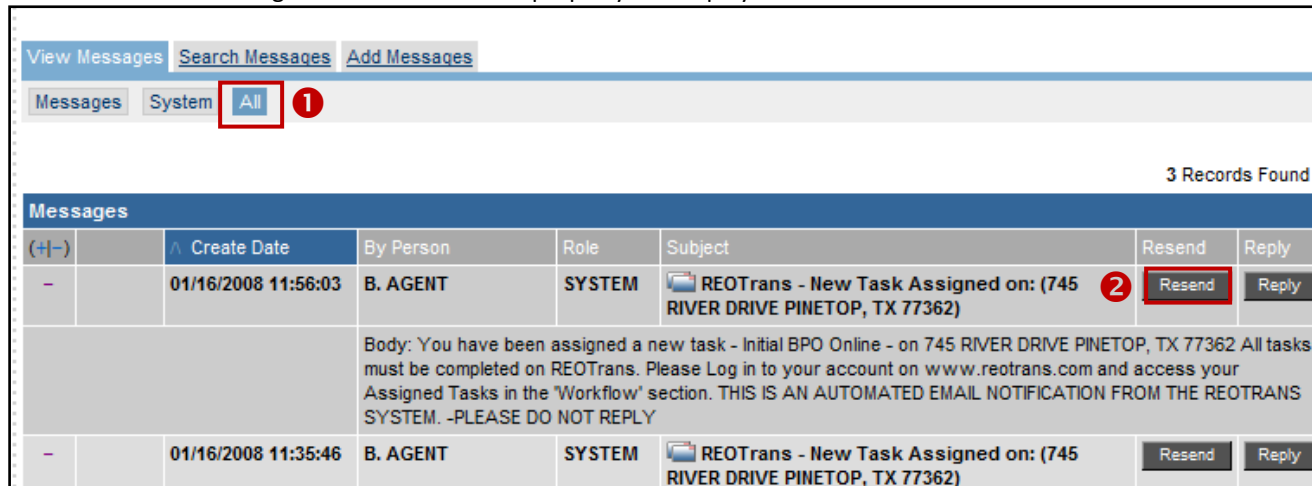
Each message belongs to a property. To view all messages for that property, click on the **View** Link in the **Messages** section in the Property Header.



Use the internal messaging system to document your communications with your Lender. These messages, along with system-created messages, will provide a complete history of what has happened on that property during the REO process. There are different types of messages that are sent and received using the Messaging system.

- **System Messages:** The system creates messages as tasks are completed. The message is sent to the recipient of the next task and a record of the sent message is kept in the Messaging system.
- **Incoming/Outgoing Messages:** You may use this Internal Messaging system to communicate with your Lender. This ensures that all communications for the property are stored in one central location for a single property.
- **File Notes:** These are messages where you may annotate your notes on the property. Simply add a message but do not select a recipient in the **To** field. The system will save your notes in the Messaging section along with the system messages and other communications.

1. Click the **View** link on the property header.
 - The messages associated with the property will display.



1 *Default View*

The default view is **All** messages.

- **System** tab - view system messages
- **Messages** tab – view user created messages.

2 *Resending a Message*

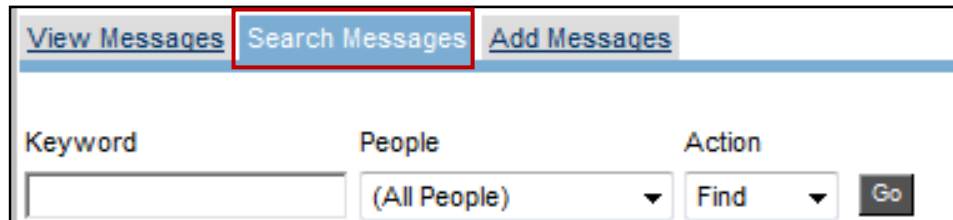
To resend a message, click on the **Resend** button. Not all messages can be resent. **Note:** System messages cannot be replied to or resent.

Messages

Searching for a Specific Message within a Property

You may search by Keyword, by named person or by action (Find or Search).

1. Click on **Search Messages** tab.



The screenshot shows a search interface with three tabs: 'View Messages', 'Search Messages', and 'Add Messages'. The 'Search Messages' tab is highlighted with a red border. Below the tabs are three search criteria: 'Keyword' with an empty text input field, 'People' with a dropdown menu showing '(All People)', and 'Action' with a dropdown menu showing 'Find'. A 'Go' button is located to the right of the 'Action' dropdown.

2. Enter the criteria into the respective fields.
3. Click on **Go** to activate the search.
 - The search results will appear showing you all messages matching your selected criteria.

Messages

Creating a Message

Copies of all messages created (system generated or manually created by a user) will be kept in the Messaging section.

1. Click the **Add Messages** link in the Messages section of the property header.
 - A new message window displays.

The screenshot shows a web interface for creating a message. At the top, there are three tabs: 'View Messages', 'Search Messages', and 'Add Messages'. Below the tabs is a blue header bar with the text 'Add Message'. Underneath, there is a 'To:' field with a dropdown menu showing four options: 'AGENT', 'ASSET MANAGER', 'CLOSING COORDINATOR', and 'TITLE COORDINATOR'. Below the 'To:' field is a 'Subject:' field, which is a text input box with a '100 Characters Left' indicator on the right. Below the 'Subject:' field is a 'Body:' field, which is a larger text input box with a '1000 Characters Left' indicator on the right. At the bottom of the form, there is an attachment section labeled '(+) Attachment(s):' and a 'Send Message' button.

2. Select the recipient(s) from the **To:** list.
 - If you wish to select more than one person, hold the **<CTRL>** key down as you select each recipient.
 - **Note:** If you just want to add a File Note, do not select a recipient.
3. Enter the title of your email in the **Subject** field.
4. Enter the information you wish to convey in the **Body** field.
 - This is a freeform text field and you will be limited to entering no more than 1000 characters.
5. Click on **Send Message**.
 - The email will be sent and a copy will be kept in the **Messaging** section of the subject property.

Messages

Attaching a File

File formats supported include:

- Adobe Acrobat pdf
- Microsoft Word .DOC or DOCX
- Microsoft Excel .XLS or .XLSx
- JPG (not to exceed 400kb)

1. Click the plus (+) symbol next to **Attachment(s)** in the message window.
 - An attachments window opens:

(-) Attachment(s):		
File	Comments	
<input type="text"/> Browse...	<input type="text"/>	clear
<input type="text"/> Browse...	<input type="text"/>	clear
<input type="text"/> Browse...	<input type="text"/>	clear
<input type="text"/> Browse...	<input type="text"/>	clear
<input type="text"/> Browse...	<input type="text"/>	clear

[Send Message](#)

2. Use the **Browse** buttons on the right side of the window to search for, and add files from your computer to send with the message.
 - Note: You must upload attachments one at a time to Messages.
3. You must enter the name or description of the document into the **Comments** field before you can send the message.
4. Click **Send Message**.

NOTE: Alternatively, you may upload documents into the file library.

- Use the Property folder to upload general property documents and photos.
- Use the Tasks folder to upload documents and photos associated with a particular task.

Agent Properties & Offers



My Properties & Offers

- To quickly find a property, click on the **My Properties & Offers** link.
 - All properties where you have open tasks will appear.
 - To filter your search, select the criteria to narrow your search by Lender, Address/City/Zip, State, and/or Status before you click on the **Search** button.
 - In this example the two properties shown have a status of Available, which means you can submit offers on these properties.

Workflow
0 Offers Need Response
0 Assigned Tasks
Messages

Agent Properties & Offers
My Properties & Offers
Place A New Offer
Post A Property

BPO Posting Board
Available BPOs
My BPOs
Change Settings

Manage Information
Edit Account Information
My Buyer Alerts
My Coverage Areas

Member Center
Agent Certification **NEW**
View Member Only Discounts

user: B. AGENT Logout

my account (21) Unread Message(s) !

Search my Properties By:
 (Lender): (Address/City/Zip): (State): (Status):
 (All) REOTrans (All) (All Status) Search

My Properties Excel 2 Records Found (Displaying 1 - 2)

Type	Address	City	State	Lender	Role	List Date	List Price	Status	Offer
	5613 BANISTER COURT	PLANO	TX	REOTRANS	AGENT	08/12/09	\$100,000.00	AVAILABLE	
	6416 OLD GATE ROAD	PLANO	TX	REOTRANS	AGENT	08/12/09	\$100,000.00	AVAILABLE	

New Negotiating Rejected Held Accepted

Agent Properties & Offers

Searching for a Property

If you wish to search for a property not in this list (either closed or one that may be on another screen), you can use the Search function to find it.



The screenshot shows a search interface titled "Search my Properties By:". It contains four input fields: "(Lender):" with a dropdown menu showing "(All)" and "REOTrans" (highlighted in blue); "(Address/City/Zip):" with a text input field; "(State):" with a dropdown menu showing "(All)"; and "(Status):" with a dropdown menu showing "(All Status)". A "Search" button is located to the right of the status dropdown.

1. Enter the search criteria in the **Search my Properties by:** section. You can search by Lender, Address/City/Zip, State, and/or Status.
 - You may search by full or partial entries such as address, city or zip, property state and current property Workflow status (including all SOLD properties). Note: Use partial search if you are not finding a match – it may be rekeyed as miss-spelled or abbreviated. Try searching by property address number.
2. Click on the **Search** button to see the results.
3. Click on the Property address to go into the Property view where you can see all the tasks for that property.

Agent Properties & Offers Submitting an Offer

The RT Marketplace provides an Offer Management system that enables the tracking of multiple offers on a single property as well as managing offers/counter-offers during negotiations. Only properties with Listed or Available status can have offers placed on them.

Offers can be placed from the **Place a New Offer** link on the **Agent Properties & Offers** menu, or from the **New Offer** button located on the **Offers Dashboard** in the Property View.

- To access the offers management system, click the **Place a New Offer** link from the Agent Listing Agents menu.
 - A list of all your properties that are in Available status appears:

The screenshot shows the REOTrans Agent Dashboard. At the top, there are five main menu categories: Workflow, Agent Properties & Offers, BPO Posting Board, Manage Information, and Member Center. The 'Agent Properties & Offers' menu is expanded, showing options like 'My Properties & Offers', 'Place A New Offer', and 'Post A Property'. Below the navigation is a 'my account' header with a notification for '(21) Unread Message(s)'. Underneath, there are tabs for 'My Listings' and 'All Listings'. A table displays two properties with columns for Address, City, State, Zip, List Price, and a 'New Offer' link.

Address	City	State	Zip	List Price	
6416 OLD GATE ROAD	PLANO	TX	75024	\$100,000.00	New Offer
5613 BANISTER COURT	PLANO	TX	75093	\$100,000.00	New Offer

- Locate the property in the grid and click on the **New Offer** link in the far right column.

Agent Properties & Offers Submitting an Offer

This is the top portion of the offers screen. Required fields are prefixed by a red asterisk. Fields will vary by Lender.

The screenshot displays the top portion of the offers screen. It features a header with a property image and a table of property details. Below this is a 'New Offer' section with a form for submitting an offer.

TYPE	ADDRESS	STATUS	LENDER			
LENDER	6416 OLD GATE ROAD, PLANO, TX 75024	AVAILABLE	REOTRANS			
ASSET MANAGER	LISTING AGENT	LIST DT	CLOSE DT	LIST PRICE	LIBRARY	MESSAGES
SALLY ASSETMANAGER	BETTY AGENT	08/12/09		\$100,000.00	View	View(207)

Below the table are buttons for 'TASKS', 'OFFERS', and 'EXPENSES'. The 'OFFERS' button shows a count of 00000 and a 'New Offer' link. The 'EXPENSES' button shows a total of \$0 \$0 \$0.

New Offer

Address: 6416 OLD GATE ROAD
 List Price: \$100,000.00
 Listing Agents Name: BETTY AGENT
 Listing Agents Phone: 1111111111
 Listing Agents Fax: n/a
 List Agents Email: AGENT900@TEST.COM
 Agency Confirmation: Pick One
 *Selling Agent First Name
 *Selling Agent Last Name
 *Selling Agent Company
 *Selling Agent Address
 *Selling Agent City
 *Selling Agent State
 *Selling Agent Zip
 *Selling Agent Phone
 Selling Agent Fax
 Selling Agent Email
 *Offer Type: Select
 *Buyer First Name (Must be buyer's full, legal name)
 *Buyer Last Name (Must be buyer's full, legal name)
 *Buyer Phone

Agent Properties & Offers Submitting an Offer

This is the bottom portion of the offers screen where you will enter information about the terms of the Offer. Fields will vary by Lender.

Buyers Premium Buyers Premium: Optional Field. This is a dollar amount. Please do not enter dollar signs, commas or periods. (Sample Format: 100)	<input type="text"/>
State Transfer Tax Optional Field. Please select an option for State Transfer Tax.	Yes ▾
Down Payment Assistance Down Payment Assistance: Optional Field. This is a dollar amount. Please do not enter dollar signs, commas or periods. (Sample Format: 100)	<input type="text"/>
Down Payment Fee Down Payment Fee: Optional Field. This is a dollar amount. Please do not enter dollar signs, commas or periods. (Sample Format: 100)	<input type="text"/>
Financing Contingency Days Financing Contingency Days: Optional Field. This is a percentage. Please do not enter percent signs. (Sample Format: 1)	<input type="text"/>
Agent Incentive Agent Incentive: Optional Field. This is a dollar amount. Please do not enter dollar signs, commas or periods. (Sample Format: 100)	0.00
HOA Dues HOA Dues: Optional Field. This is a dollar amount. Please do not enter dollar signs, commas or periods. (Sample Format: 100)	<input type="text"/>
Other Expense Description 1 Optional field, enter a brief description of the Seller Usual Expenses the seller needs to pay. This is a text field limited to 100 characters. (Example: Owner's Title Policy, transfer taxes and seller's total closing costs excluding other fees already noted on offer worksheet.)	<input type="text"/>
Other Expense Amount 1 Optional Field, enter the dollar amount of the Seller Usual Expenses the Seller needs to pay. If you enter an amount, please make sure to include a description in the Other Expense Description field. This is a dollar amount. Please do not enter dollar signs, commas or periods. (Sample Format: 10000)	<input type="text"/>
Other Expense Description 2 Optional field, enter a brief description of the Seller Usual Expenses the seller needs to pay. This is a text field limited to 100 characters. (Example: Owner's Title Policy, transfer taxes and seller's total closing costs excluding other fees already noted on offer worksheet.)	<input type="text"/>
Other Expense Amount 2 Optional Field, enter the dollar amount of the Seller Usual Expenses the Seller needs to pay. If you enter an amount, please make sure to include a description in the Other Expense Description field. This is a dollar amount. Please do not enter dollar signs, commas or periods. (Sample Format: 10000)	<input type="text"/>
Other Expense Description 3 Optional field, enter a brief description of the Seller Usual Expenses the seller needs to pay. This is a text field limited to 100 characters. (Example: Owner's Title Policy, transfer taxes and seller's total closing costs excluding other fees already noted on offer worksheet.)	<input type="text"/>
Other Expense Amount 3 Optional Field, enter the dollar amount of the Seller Usual Expenses the Seller needs to pay. If you enter an amount, please make sure to include a description in the Other Expense Description field. This is a dollar amount. Please do not enter dollar signs, commas or periods. (Sample Format: 10000)	<input type="text"/>
Comments Optional Field, include any brief comments you would like the seller to consider. This is a text field limited to 100 characters.	<input type="text"/>
<input type="button" value="Submit Offer"/>	

3. After completing the form, click on the **Submit Offer** button.
 - You will be returned to the **Property View** and the Offer is now in **Negotiation Status**.

The screenshot shows the 'my account' dashboard with a property listing for 6416 Old Gate Road, Plano, TX 75024. The listing includes details for the Asset Manager (Sally Assetmanager), Listing Agent (Betty Agent), and a list price of \$100,000.00. A red box highlights the 'OFFERS' count (1) and the 'New Offer' button. A red arrow points from this box to the 'Offer 1: + NEGOTIATING' status in the Offers section. Below the Offers section, a legend shows the status colors: New (green), Negotiating (yellow), Rejected (grey), Held (red), and Accepted (dark green).

Identity	Source	Target	Selling Agent	Buyer	Offer Date	Offer Type	Offer Expiration	Offer Amt
Buyer	B. AGENT	S. ASSETMANAGER	B. AGENT	J. Doe	08/12/09	HOME OWNER	No Exp	\$100,000.00

1 Offers Dashboard

- **New** – Offer is new
- **Negotiating** – Offer is in negotiating status. Agent is waiting for Lender (Asset Manger) to respond.
- **Rejected** – Offer has been rejected, Lender does not wish to negotiate with terms provided. Property returns to available status awaiting new offers.
- **Held** – Offer is in a hold status awaiting Lender to respond. May occur when mutiple offers are provided (only one Offer can be active) or when Offer is being approved on the Lender side.
- **Accepted** – Offer has been accepted.

- An email is sent to the Lender alerting them to this new offer.
- Check your messages as some lenders will ask for you to send additional information once you have submitted an offer.

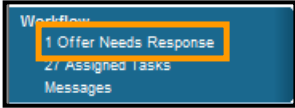
The screenshot shows a web interface for viewing messages. At the top, there are tabs for 'View Messages', 'Search Messages', and 'Add Messages'. Below these are filters for 'Messages', 'System', and 'All'. A dropdown menu for 'Apply to Checked:' is set to 'Action...'. On the right, it says '9 Records Found'. The main area is titled 'Messages' and contains a table with columns: '(+)', 'All', 'Create Date', 'By Person', 'Role', 'Subject', 'Resend', and 'Reply'. One message is highlighted with a red border. The message details are as follows:

(+)	All	Create Date	By Person	Role	Subject	Resend	Reply
-		01/21/2008 10:56:22	S. AGENT1	ASSET MANAGER	Pre-Approval Letter Required on: (333 SAILBOAT WAY, HAWTHORNE CA 90250)	Resend	Reply

Below the table, the message body is displayed: 'Body: A Pre-Approval Letter is required to be submitted along with the offer on 333 SAILBOAT WAY, HAWTHORNE CA 90250 for Offer Number 1. If you do not complete this task within 24 hours, the offer will be rejected automatically. Please log in to REOTrans and complete this task.'

- If you need to view the Offer terms again, they are located in the Offer Worksheet, which is accessible via the [View Online](#) link or the [PDF Worksheet](#) link. The PDF Worksheet link opens up the Offer Worksheet in a separate browser window where you can save or print the worksheet.
- After the Lender has reviewed the terms of the Offer, you will receive an email indicating whether or not the Offer was accepted. If the Lender wishes to negotiate further, you will receive notification via email and also in the RT Marketplace system. Click on the [Offer Needs Response](#) link under the Workflow menu to see the Offer worksheet to which you need to respond.

Offers Negotiating an Offer



1. Click on the **Offer Needs Response** link from the Workflow tab.
 - A list of current offers from the Lender appears.

Workflow: **Offer Needs Response**, Assigned Tasks, Messages

Agent Properties & Offers: My Properties & Offers, Place A New Offer, Post A Property

BPO Posting Board: Available BPOs, My BPOs, Change Settings

Manage Information: Edit Account Information, My Buyer Alerts, My Coverage Areas

Member Center: Agent Certification **NEW**, View Member Only Discounts

(24) Unread Message(s)

my account

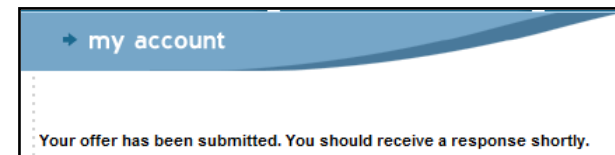
1 Records Found (Displaying 1 - 1)

Address	City	State	Listing Agent	Selling Agent	Buyer	Lender	Expiration	
6416 OLD GATE ROAD	PLANO	TX	AGENT, BETTY	AGENT, BETTY	Doe, John	REOTRANS	No Exp.	Counter Offer View Worksheet

Source	Target	Selling Agent	Buyer	Offer Date	Expiration Date	Offer Amt
S. AGENT1	S. SELLER1	S. AGENT1	J. James	01/21/08	No Exp	\$99,000.00
S. SELLER1	S. AGENT1	S. AGENT1	J. James	01/21/08	No Exp	\$99,000.00

Date	01 21 2008	01 21 2008	01/21/2008
Identity	BUYER	Seller	Buyer
* Purchase Amount (Enter First)	89000	99000	OK
* Earnest Money Amount	10000	10000	OK
* Down Payment Percent	25	25	OK
* Down Payment Amount	22250	24750	OK
* Closing Date	02 01 2008	02 01 2008	OK
* Per Diem Amount	150	150	OK
Loan Amount	56750	64250	OK
* Pest Inspection Amount	450	450	OK
* Buyer Cost Amount	0	0	OK
Repairs Description			OK
Repairs Amount			OK
Home Warranty Amount			OK
Inspection Time (Days)			OK
Termite Amount			OK
Transfer Fees Amount			OK
* Commission Percent	6.00	6	6.00
* Commission Amount	5340	5940	OK
Appraisal Cost			OK
Origination fee			OK
Points Amount			OK
FHA/VA Allowable Costs			OK
Other Loan Types Non Allowable			OK
Requested Repairs By Buyer/Lender			OK
Other Loan Types Fumigation/Chemical			OK
Pest Report Fee			OK
Sellers Closing Costs			OK
Sellers Other Costs			OK
Other Expense Description			OK
Other Expense Amount			OK
Comments			OK

- Click on **View Worksheet** to review the counterOffer with the buyer. You may email the worksheet in pdf form if necessary.
- Click on **Counter-offer** to bring up the worksheet for you to make revisions or to accept the counter-offer
 - The Offer Worksheet appears. The original Offer appears on the far left column. The counter-offer appears in the middle column and any terms that are different from the original Offer appear in green.
- You may continue to negotiate individual terms by entering in the terms into the third column on the right and selecting **Send Offer**.
 - Tip: Click **OK** and the amount is copied over for you. You can still make changes.
- If you wish to accept this counterOffer, scroll down to the bottom of the screen and click on the **Agree** button. You can also use the **Reject** button to stop the Offer negotiation process entirely if the buyer does not wish to continue.
 - You will be returned to the main screen.



- The offer is now in hold status.
- When the offer has been approved by the Lender, you will receive an email in the email account assigned to your REOTrans account that the Offer has been accepted.

File Library

Each property has its own file library where electronic documents and photos are stored and these files are accessible to both the Agent and Lender. As you complete your tasks, if the task involved uploading documents or photos, these files are stored in the Library.

- From the Property Header, you may access the Library for the subject property by clicking on the **View** link in the **Library** section.

TYPE	ADDRESS	STATUS	LENDER			
LENDER	333 SAILBOAT WAY, HAWTHORNE, CA 90250	PENDING				
ASSET MANAGER	LISTING AGENT	LIST DT	CLOSE DT	LIST PRICE	LIBRARY	MESSAGES
SAMPLE SELLER1	SAMPLE AGENT1	01/21/08	02/01/08	\$85,500.00	View	View(9)

TASKS: 0 0 0 9 OFFERS: 0 0 0 0 1 EXPENSES: \$0 \$0 \$0

- A listing of categories all of the files associated with this property appears.

- (+) Property Files 99%
 - (+) Property
 - (+) Messages
 - (+) Tasks
 - (+) Orders
 - (+) Offers
 - (+) Lender Files

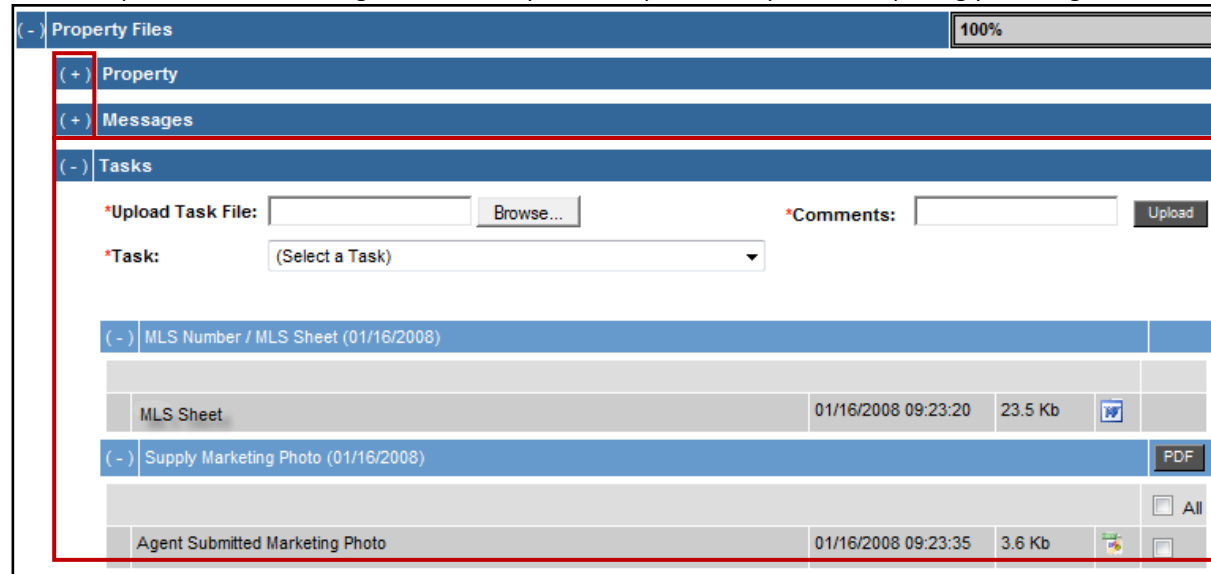
- All documents you have uploaded, including photos, are stored in the Library under the **Tasks** folder.

1 Property File Types

- **Property** folder allows you to upload additional files associated with the property but do not pertain to a particular task.
- **Messages** folder contains property-specific messages that had attachments such as Listing agreement or Offer worksheets.
- **Tasks** folder contains Agent’s documents and photos uploaded in response to completing a task. You can also upload additional task related documentation and photos.
- **Orders** folder is used by vendors and content is not visible by Agents.
- **Offers** folder is for you to upload additional documents pertaining to an Offer.
- **Lender Files** folder contains Lender specific documents visible to the Agent.

File Library

- Click on the + sign next to the category you wish to view. In this example we have clicked the + symbol next to the **Tasks** heading.
 - The **Tasks** folder expands to show a listing of all the files you have uploaded as part of completing your assigned tasks.



1 Document Attachments

To quickly view documents, click on the PDF link or Word/Excel logo. The document will open in a separate browser window for you to view and print it out.

2 Photo Attachments

Photos can be viewed by hovering over the graphic icon. The photo will appear in a pop-up window.

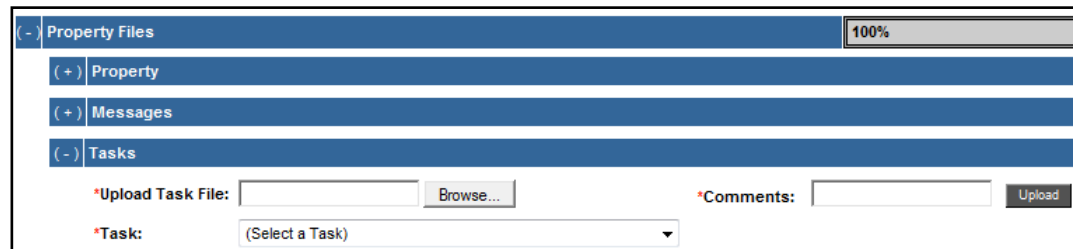
File Library Uploading Multiple Files in File Library

In addition to being able to upload files one at a time when working with a task, you may also use the **Bulk File Uploader** feature when uploading files into the File Library.

1. Open the File Library by clicking on **View** in the **Library** section of the Property Header
 - The File Library opens and the sub-folders appear.



2. Open the **Tasks** sub-folder by clicking on the + sign to the left of the folder name.
 - The **Tasks** sub-folder expands.



File Library

Uploading Multiple Files in File Library

- In the **Task** field, select the task associated with the documents or files you are uploading.

The screenshot shows a web interface for uploading files. At the top, there's a breadcrumb 'Property Files' with a '100%' progress indicator. Below it are expandable sections for 'Property', 'Messages', and 'Tasks'. The 'Tasks' section is expanded, showing a form with the following fields:

- *Upload Task File:** A text input field with a 'Browse...' button.
- *Comments:** A text input field with an 'Upload' button.
- *Task:** A dropdown menu with a red border around it. The dropdown is open, showing the following options:
 - (Select a Task)
 - (Select a Task)
 - Personal Property Evaluation (12/15/2008)
 - Accept / Reject Listing (12/15/2008)
 - Provide Occupancy Status (Pre-Listing) (12/15/2008)

Below the 'Task' field, there is a label 'For multiple document'.

- Click on **Bulk File Uploader**.

The screenshot shows a dialog box titled 'REOTrans Bulk File Uploader'. It has a close button (X) in the top right corner. The dialog contains a table with the following columns: 'File', 'File Size', and 'Description'. The table is currently empty. Below the table, there are four buttons: 'Browse For Files', 'Upload', 'Remove', and 'Clear All'. The 'Browse For Files' button is highlighted with a red box.

- Click **Browse For Files** and select the files you wish to upload. Hold the <Ctrl> key down to select multiple files.
- Enter the description for each file you upload into the **Description** column.
- Click **Upload**.

File Library

Uploading Multiple Files to the File Library

- The files appear in the **Tasks** folder in the related task's sub-folder.

(-) Tasks

*Upload Task File: *Comments:

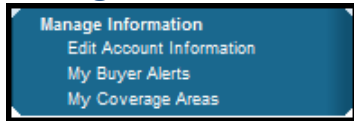
*Task:

For multiple documents try our [Bulk File Uploader](#). (Requires [Adobe Flash 9](#) or higher)

(-) Personal Property Evaluation (12/15/2008)
PDF

				All
Back View	12/15/2008 13:04:04	20.0 Kb		<input type="checkbox"/>
Bathroom	12/15/2008 13:04:06	8.9 Kb		<input type="checkbox"/>
Bedroom	12/15/2008 13:04:07	8.2 Kb		<input type="checkbox"/>
Front View	12/15/2008 13:04:09	16.0 Kb		<input type="checkbox"/>
Kitchen	12/15/2008 13:04:10	10.6 Kb		<input type="checkbox"/>

Manage Information



This menu covers the various functions involved in setting up and maintaining your account within the REOTrans system. It has 3 menu options:

- **Edit Account Information**
- **My Buyer Alerts**
- **My Coverage Areas**

My Account Information

There are 5 tabs within the Edit Account Information menu:

- **My Information:** This is where you setup and maintain your contact information, user email address (user ID), password and licensing information as well as your email options for the REOTrans messaging system.
- **My Photo:** This is where you can add a photo of yourself for Lenders to review. (Additional fee required of \$2 per month flat fee)
- **My Comments:** This is where you can add additional information about your REO experience for Lenders to review. (Additional fee required of \$2 per month flat fee)
- **My Credit Card:** This is where you can review and change credit card billing information.
- **My Files:** This is where you can review and upload new licensing, E&O Insurance and additional documentation.
- **My Certification:** This is where you can view your certification level and enroll in certification courses.



Manage Information

My Information

The screenshot shows the 'My Information' screen with the following sections and fields:

- Navigation Tabs:** My Information (selected), My Photo, My Comments, My Credit Card, My Files, My Certification
- Personal Information:**
 - *First Name: BETTY
 - *Last Name: AGENT
 - *Email: AGENT900@TEST.COM
 - Mobile: [Empty]
- Password:**
 - (Leave Blank To Keep Current Password) [Help](#)
 - New Password: [Empty]
 - Confirm Password: [Empty]
- Security Question:**
 - *Question: Birth City? [Dropdown]
 - *Answer: [Masked]
- Security Question 2:**
 - *Question: First Car Color? [Dropdown]
 - *Answer: [Masked]
- License Information:**
 - * Number: 458963
 - * Exp Date: 05/29/2009
 - * State: California
- E & O Insurance Information:**
 - Carrier: [Empty]
 - Exp Date: [Empty]
- Work Address:**
 - Company: Agents R Us
 - * Address (1): 111 Agent Way
 - Address (2): [Empty]
 - * City: Los Angeles
 - * State: California
 - * Zip: 90250
 - * Phone: 111-111-1111
 - Fax: [Empty]
- Home Address:**
 - Address (1): [Empty]
 - Address (2): [Empty]
 - City: [Empty]
 - State: [Dropdown]
 - Zip: [Empty]
 - Phone: [Empty]
 - Fax: [Empty]

This is the top half of the **My Information** Screen. Required fields are preceded by a red asterisk. Complete the following:

- **First Name & Last Name**
- **Email:** Your work email address. This will be the email account where you will receive initial notifications that work needs to be completed in REOTrans. Details regarding the task will be in the Messages section of REOTrans. **Note:** Your email address is also your login ID for the REOTrans system.
- **Password:** Upon account setup, you provided a login password. To change the password enter it into the **New Password** and **Confirm Password** fields.
- **Work Address:** Enter company name, address and phone information.
- **Home Address** (not required).
- **Certification Information:** This field indicates whether you are REOTrans certified or not. Certification classes are currently held at major industry conventions.
- **License Information:** Enter your Broker License information.*
- **E&O Insurance Information:** Enter carrier and expiration date information.*

*Documents supporting licensing and insurance may be uploaded in the **My Files** tab.

Manage Information

My Information

Email Options

Receive Emails? HTML Text No [Help](#)

Receive BPO Alerts? Yes No [Help](#)

Receive third party emails? Yes No [Help](#)

Signature:
500 Characters Left

Out of Office:

Message:
500 Characters Left

CC Email:

CC Email Add:

***required fields**

This is the bottom half of the **My Information** Screen. Required fields are preceded by a red asterisk. Complete the following:

Email Options

- **Receive Emails:** Indicate by selecting the appropriate radio button how you wish to see email content: HTML or Text or select No if you do not wish to receive emails.
- **Receive BPO Alerts:** Indicate if you wish to receive a message when a BPO is available in one of your coverage areas.
- **Receive third party emails:** This functionality is not currently active.
- **Signature:** This allows you to add signature lines to all messages you create in the system.
- **Out of Office Message:** This checkbox and related **Message** box allows you to turn on the feature and to have an Out of Office message go to whoever is sending you a message. When you return, don't forget to turn off the **Out of Office** checkbox.
- **CC Email:** This checkbox and related **CC Email Add** field allows you to turn on the feature and to add an email address to another person so that they can see any message sent to you through the system.
- **Save User Changes:** To save any changes you have made on this screen, click the **Save User Changes** button.

Manage Information

My Photo

My Information My Photo My Comments My Credit Card My Files My Certification

Upload a photo for: **BETTY AGENT**

This photo will only display on the Public site to potential buyers. If you would like your photo to display to Lenders when they are choosing Listing Agents, you must first activate Coverage Areas by clicking [here](#).

Only .jpeg/.jpg images are accepted - File Size less than 400kb. Agent Photo must be a **Personal Photo**. Inappropriate photos, company logos, or advertising are NOT permitted.

Agent Photo Browse...

Upload Photo

This screen allows you to upload your photo to appear along with your profile (comments). This cost is an **additional \$2.00 per month**.

This helps your account to be more visible to the Lender for possible selection for listings.

Manage Information

My Comments

My Information My Photo My Comments My Credit Card My Files My Certification

Personal Comments For: **BETTY AGENT**

These comments will be displayed to Lenders when they pull up listings in your Coverage Areas.

Comments:

With over 20 years experience as an agent and broker, I am experienced in REO, Short Sale, Foreclosure Auction and traditional home sales.

87 characters left

Submit

This screen allows you to upload comments about yourself. It does not allow advertising brochures to be uploaded and is limited to 225 characters. This cost is an **additional \$2.00 per month**.

Uploading comments (profile) about yourself helps your account to be more visible to the Lender for possible selection for new listings.

NOTE: You cannot add **Comments** to your profile unless you have activated more than one **Coverage Area**.

Manage Information

My Credit Card

This screen shows the credit card information currently setup for your account.

- If you wish to use a different credit card for billing, select the **Enter a New Card** radio button and complete all the fields in this section.

Note: If the new credit card is billed to a different address, select the **Other Address** radio button and enter the address information.

- Click **Submit** to save the changes.

Manage Information

My Files

					Delete
2009 Insurance	Agent EO Insurance	B. AGENT On 08/12/2009 12:18:14	316.6 Kb		<input type="checkbox"/>
2009 W9	Agent W9	B. AGENT On 08/12/2009 12:18:26	316.6 Kb		<input type="checkbox"/>
2009 License	Agent License	B. AGENT On 08/12/2009 12:18:48	316.6 Kb		<input type="checkbox"/>

This screen shows the files you should have uploaded when you setup your account.

- To view the files, click on the PDF link. The document will appear in a separate browser window.
- To delete an existing file, click on the checkbox next to the pdf link for the document and click on the **Delete** button.
- To upload a new document, click on the Browse button and navigate to the file you wish to upload. Indicate its **File Type** plus additional information about the document in the **Comments** field.
- Click on the **Upload** button to save the changes.

Manage Information My Coverage Areas

Account Summary

Qty	Item	Est. Monthly
197	Coverage Areas	\$177.30
	Bold (all coverage areas)	\$0.00
	Comments (all coverage areas)	\$0.00
	Photo (all coverage areas)	\$0.00
	Free Coverage for zip code 90815	\$0.00
Estimated Monthly Total :		\$177.30

My Coverage Areas

Remove	Zip	City	State	Status	Daily Rate	Est. Monthly Rate
FREE!	90815	Long Beach	California	Active	\$0.00	\$0.00
<input type="checkbox"/>	90002	AUGUST F. HAW, Los Angeles, Watts	CALIFORNIA	Active	\$0.03	\$0.90
<input type="checkbox"/>	90003	BROADWAY MANCHESTER, Los Angeles	CALIFORNIA	Active	\$0.03	\$0.90

This menu has 3 tabs:

- **My Coverage Areas**
- **My Coverage Views:** This screen is used to see how many times your Agent information has been viewed by a Lender.
- **My Coverage Statements:** This screen is used to view coverage billing.

This screen shows you how much you are billed each month for your coverage areas (home office zip code is free) plus any additional fees for your photo (\$2 per month flat fee) and/or Profile/Comments (\$2 per month flat fee) and/or Bold text fee (\$1 per month flat fee).

It also indicates how many listing have been assigned to you during the last month.

Manage Information My Coverage Views

This screen shows you how many times your coverage area(s) have been viewed by Lender(s).

Manage Information My Coverage Statements

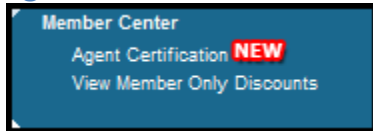
Coverage Area Statement

From	To	Days	Item	Unit Price	Extended
07/01/2009	07/31/2009	30	90220	\$0.03	\$0.90
07/01/2009	07/31/2009	30	90221	\$0.03	\$0.90

This screen shows you statement by month.

1. Select the **Month** from the drop-down list.
2. Click on the **Display** button to see account billing for the month selected.

Member Center Agent Certification



The **Member Benefits Center** tab contains links to **Agent Certification** and to **Member Only Discounts**.

1. Click the **Agent Certification** link in the **Member Center** tab.
 - The **Select Certification** page appears.

Certification Level	Basic*	Silver	Gold	Platinum
Priority Ranking in Lenders' Search Results	4th	3rd	2nd	1st
Use of the REOTrans Certification Logo on Your Marketing Materials and Website	✓	✓	✓	✓
Total Online Training Courses		4	6	8
Free Display Options: Comments, Bold Title, Photo (\$60/year Value)				✓
Market Your Business to Lenders with a PDF Brochure in Your Profile				✓
Promote Your Website with a Link on Your Agent Profile				✓
Access to Exclusive Platinum Certified Agent Events				✓
Annual Subscription	Free*	\$199/year	\$299/year	\$499/year
		Select	Select	Select



- There are four levels of **Agent Certification**.
 - **Basic** – Basic Certification is Offered free of charge to Agents at REO-specific conventions. Basic Certified Agents are listed above non-certified Agents in Lender search engine results.
 - **Silver** – Silver-Certified Agents appear above Basic-Certified Agents in Lender search engine results.
 - **Gold** – Gold-Certified Agents appear above Silver-Certified Agents in Lender search engine results.
 - **Platinum** – Platinum-Certified Agents appear at the top of Lender search engine results. Platinum-Certified Agents also get free upgrades to their profile (photo, comments, bold text – a \$60 value). Platinum-Certified Agents also have the exclusive option of including a link to their company website and uploading a PDF to their profile.

Member Center

Member Only Discounts

The **View Member Only Discounts** section contains discounts and special pricing that are exclusive to our members.

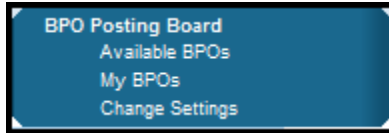
- Click the **View Member Only Discounts** link in the **Member Center** tab
 - The **Member Only Discount Page** appears.

Appliances	Communication	Computers	Electronics	Home Decor	Home Improvement	Office Supplies	Services	Software
Appliances Logo KitchenAid has spent decades creating innovative products for the well-equipped kitchen. From commercial grade cooktops and wine cellars to stand mixers and an impressive assortment of cookware, bakeware and accessories, we offer virtually every culinary essential you could need. See all KitchenAid Countertop Appliance Special Rebate Offers available at shopKitchenAid.com					Home Improvement Logo PlumberSurplus.com offers its customers tens of thousands of plumbing, home improvement, and building products in a range of categories including Kitchen and Bathroom, Water Heaters, Lighting, Pumps, Tools, Access Doors, Valves, Commercial and more. \$5 off at PlumberSurplus.com Free Ground Shipping on over 23,000 Products at PlumberSurplus.com Use coupon code PSCJAFFA851BC			
 Aj Madison Your Appliance Authority™ AJ Madison is the #1 independent online appliance store. We are a genuine authorized dealer and an enormous presence in the world of e-commerce. Our inventory includes an array of top quality products including cooking appliances, air conditioners, outdoor living products, refrigerators, washers/dryers, dishwashers, food disposers, faucets and more from trusted brands like GE, Frigidaire, Whirlpool, KitchenAid, Maytag and hundreds more. Save \$5 off every order over \$499! Save \$50 off every order over \$1999! Use coupon code: 8AE6QVT7 Use coupon code: XE61S808 Save \$20 off every order over \$999! Use coupon code: 46JZ5K5A					Logo We offer the best prices on name brand Power Tools, Cordless Tools, Air Tools, Automotive Tools, Hand Tools, Power Cords, Storage Chests, Gardening Tools, and Woodworking Tools. Take up to an additional \$20 off selected Milwaukee tools. Take 15% off any Delta, DeWalt, and Porter Cable Accessory. Excludes Batteries, Chargers, and Tools. Coupon TKDPD15 Free Ground Shipping on orders over \$75.			
 COMPACT APPLIANCE CompactAppliance.com is an Internet Retailer Top 500 site and was created to provide an online destination for people in search of distinctive home appliances that offer maximum functionality in a minimal amount of space. We pride ourselves in delivering excellent customer care and unique products at a fair price.					Office Supplies Logo Overnight Prints offers premium quality printing at the most competitive rates in online printing. Why waste your time going to the store when you can order online? It's fast, easy, and convenient. Start the Celebration NOW! SAVE 30% on HOLIDAY GREETING CARDS! use code ONPGREET30! Save Now! BROCHURES & MAILERS DIRECT To Your Customers! Everything Your Business Needs to Grow! Save 10% use code ONPDMSAVE10			

There are nine categories of products and services to choose from.

- Appliances
- Communication
- Computers
- Electronics
- Home Décor
- Home Improvement
- Office Supplies
- Services
- Software

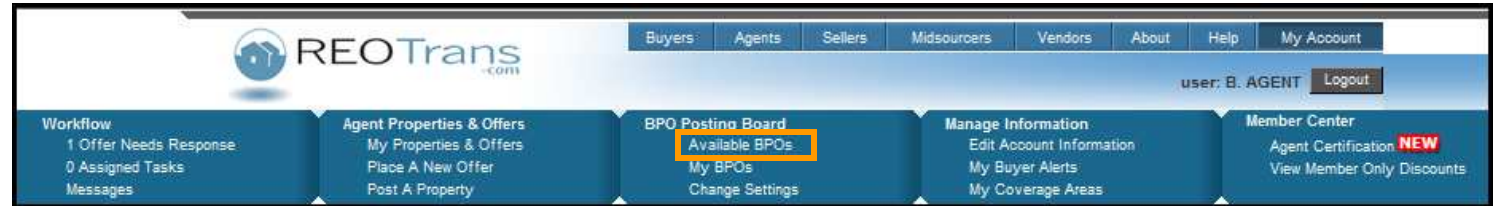
BPO Posting Board



Outside of the work you may perform for a Lender as a listing Agent, the REOTrans system will notify you when a BPO request in your coverage area has been received. You can then log into the system and accept the BPO request.

Important Note: REOTrans is not a BPO Referral Service. You are competing with all the other Agents in the coverage area. This functionality allows the first Agent to respond to the BPO Posting to receive the BPO.

1. Click on the **Available BPOs** link on the **BPO Posting Board** menu.



- To select an available BPO, click on the **Accept Order** in the right hand column of the property in the **Available BPOs** section. The selected BPO will appear as an Assigned Task for you to complete.

No matching data found!										
Available BPOs (These BPOs are currently Available)										
BPO Type	Address	City	State	Zip	Pmt	Requestor	Info	Posted	Due Date	
* Clicking on 'Request BPO' does not guarantee the Agent will receive the BPO Order.										
Accepted BPOs (These BPOs have already been accepted by Agents)										
BPO Type	Address	City	State	Zip	Pmt	Requestor	Info	Posted	Accepted Date	
Drive By - Standard - 72 Hour	9605 BICKLEY DRIVE #1	HUNTINGTON BEACH	CA	92646	\$50	BankersAssetManagementBPO 501-537-0077	N/A	08/12/2009 7:00AM (Pacific)	08/12/2009 7:00AM (Pacific)	Order Accepted by Another Agent
Drive By - Standard - 72 Hour	23507 MAIN STREET	CARSON	CA	90745	\$50	BankersAssetManagementBPO 501-537-0077	N/A	08/12/2009 7:00AM (Pacific)	08/12/2009 7:00AM (Pacific)	Order Accepted by Another Agent
Drive By - Standard - 72 Hour	5524 WALNUT AVE	LONG BEACH	CA	90805	\$50	BankersAssetManagementBPO 501-537-0077	N/A	08/06/2009 7:00AM (Pacific)	08/06/2009 7:00AM (Pacific)	Order Accepted by Another Agent
Drive By - Standard - 72 Hour	8661 LA SALLE STREET	CYPRESS	CA	90630	\$50	BankersAssetManagementBPO 501-537-0077	N/A	08/09/2009 7:00AM (Pacific)	08/09/2009 7:00AM (Pacific)	Order Accepted by Another Agent

- BPO Type:** Indicates the type of BPO that needs to be performed e.g. Interior, Exterior, time limitations. Mouse over on the **Info ?** button for more information regarding this request.
- Address, City, State, Zip:** Indicates the property address.
- Pmt:** Indicates payment amount for this BPO. You will be paid for the BPO by the Requestor, not through REOTrans.
- Requestor:** Indicates the BPO Company requesting the BPO.
- Info:** Indicates additional information for the BPO
- Posted:** Indicates date and time that the BPO was posted
- Due Date:** Indicate due date and time that BPO must be received by the Requestor.

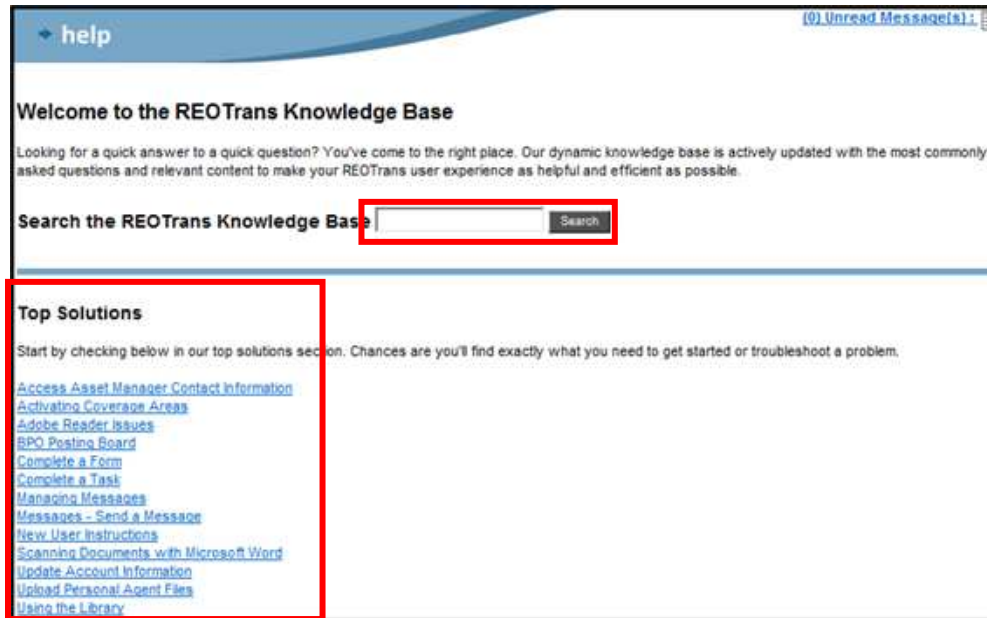
Troubleshooting Knowledge Base

Additional frequently asked questions can be reviewed through our Knowledge Base.

- Click on the **Help** menu from the top menu bar.

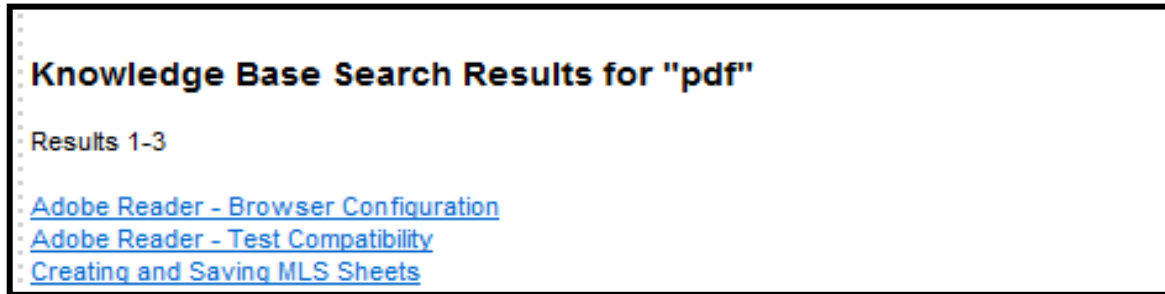


- The Help screen appears.



2. Start by checking the **Top Solutions**. Chances are you'll find exactly what you need to get started or troubleshoot a problem.

3. Alternatively, search by keyword through the Search function.
 - Enter the keyword and select the Search button to see the results.
 - For example, searching the Knowledge Base using the keyword **PDF** produces the following results:



4. Click on a Results link to view the details.

Troubleshooting

If after reading the topics, you have not found your answer, you may select additional help from a variety of sources:

Get More Help



- **Email**: a pop-up window appears containing a form you can complete to submit your request for support. Alternatively, you may send an email directly to our dedicated Agent customer service representatives at Agenthelp@reotrans.com.
- **Live Chat**: a live chat session will open up and our dedicated live chat customer service representatives are available to take your questions
- **Video Tutorials**: Coming Soon!
- **Contact Us**: gives you the dedicated Agent help phone line to our customer service representatives along with our mailing address and support hours. (310) 469-9167.

Glossary of Terms and Definitions

Term	Definition
Dashboard	System indicators that displays the number and/or state of tasks, offers, or expenses.
Hyperlink	Any underlined text in the application. Hyperlinks navigate to other windows when you click on them.
Phase	Section of Workflow. There are 3 main phases in REO: Pre-Listing, Marketing and Closing. Each phase consists of multiple processes. Named Phases may differ by Lender.
Process	A set of events involved in completing each Phase in Workflow. For example, Pre-Listing may consist of processes for Occupancy, Property Preservation, Valuation and Marketing Plan. Processes may differ by Lender.
Property Status	Property goes through several statuses during Workflow - Prelisting, Available (ready to market), Pending (Closing) to Sold. If the property is to be taken off the market, it becomes Unavailable. Statuses may vary by Lender.
Rights	(Within the system) permissions that enable the user to perform tasks and functions based on the user's role.
Role	An identity that performs a specific set of tasks within the REOTrans system. Roles can be internal such as Asset Manager, Title Coordinator or Closing Coordinator or they can be external such as Listing Agent, Closing Company, Title Company, etc. Roles are specific by Lender.
Task	Steps that must be performed to process an REO. There may be one or more tasks within a single process.
Trigger	Events that will start a particular task or process. Tasks can be triggered several ways: <ul style="list-style-type: none">• Completion of a task which in turn may trigger one or more additional tasks. Completion of occupancy status task may trigger cash for keys.• By a specific date being reached: These are called Scheduled Tasks. An example would be the periodic status reports you may be asked to provide to the Lender.
Workflow	A system that facilitates the movement of tasks to complete a process. Workflow consists of roles, rights (permissions), and tasks grouped by phase and process.

Wrap Up & Review

You have completed the Getting Started with the REOTrans Marketplace System manual.

You should now be able to:

- Log into RT Marketplace
- Identify the parts of the Home Screen
- Identify the parts of the Workflow Menu
- Successfully work with Tasks in Property View
- Successfully work with Tasks from the Workflow Menu
- Upload single and multiple files in RT Marketplace
- Work with messages in the RT Marketplace
- Successfully utilize the Agent Menus
- Submit and manage offers in the RT Marketplace
- Access and utilize the File Library
- Manage your information in the RT Marketplace
- Utilize the Member Benefits menu
- Successfully access available BPO requests through the BPO Posting Board
- Successfully troubleshoot any issues you encounter while working in the RT Marketplace