

## Table of Contents

<b>Why TitleExpress?</b> .....	<b>2</b>
<b>Solution Comparison Chart</b> .....	<b>3</b>
<b>RealExpress™ Integrations</b> .....	<b>4</b>
<b>TitleExpress Services</b> .....	<b>5</b>
Printed Products .....	5
Custom Check Design.....	5
Auto-clear Setup .....	5
Positive Pay Setup.....	5
Document Customization .....	5
<b>Document Preparation System</b> .....	<b>6</b>
Standard Forms Packages .....	6
Document Customization Services .....	6
TitleExpress Document Manager.....	6
<b>TitleExpress Cloud Hosting</b> .....	<b>7</b>
<b>Training &amp; Support</b> .....	<b>8</b>
<b>Getting Started</b> .....	<b>8</b>

## About SMS TitleExpress

---

We're committed to simplifying the real estate closing process. Our three-part approach includes; (1) high-quality enhancements on a quarterly basis; (2) good value for current and future customers; and (3) industry-leading customer support. Contact us for information on new and upcoming integrations and to learn how customers are benefitting from our best-in-class customer service technology for title and settlement software.

SMS TitleExpress | [sales@smscorp.com](mailto:sales@smscorp.com) | 800.767.7832 | [www.smscorp.com/titleexpress](http://www.smscorp.com/titleexpress)

## Why TitleExpress?

---

***TitleExpress® is right-sized for your business, developed by title industry experts for ultimate flexibility and configured for your workflow and integration needs. We deliver the functionality you need on the best platform for you.***

When you choose settlement software, you make an investment in your business. TitleExpress is committed to maximizing the value of your investment with the features and support you need, backed by a Fortune 500 company with 130 years of outstanding performance.

### FEATURES AND BENEFITS

- Unlimited closings included with annual investment
- Locally installed or a cloud-hosted subscription options, based on your company needs.
- Secure, real-time order access for your customers with the ability to share documents using iOrderExpress™
- Customizable forms that can be tailored to your specifications
- Multiple underwriter and rate schedule support
- Regular security and compliance updates
- Escrow accounting, reconciliation, and 1099-S reporting
- Comprehensive RealExpress™ integration platform for one-time data entry
- Customizable workflow and event management to track title policies and recordings
- Document preparation and management
- Robust rate and premium calculator
- Scalable to meet the needs of any number of users, affiliated companies, and jurisdictions

### EASY ONBOARDING

With a comprehensive and easy-to-use interface, TitleExpress fully integrates your title and settlement processes. Information flows seamlessly through order entry; HUD-1, Closing Disclosure, or Settlement Statement preparation; document preparation; check writing; escrow account reconciliation; and management reporting.

To ensure a smooth implementation process, all tax tables, underwriter premium calculations, document branding and other customizations are configured according to your specifications prior to training. Beginning with your Customer Success Consultation, our Training team works with you to ensure your TitleExpress system is ready to go before training of your team. No surprises!

### SYSTEM REQUIREMENTS FOR LOCAL INSTALLATION

Meeting the minimum system requirements assures optimal, trouble-free program operation and minimizes the user's support needs. A stable environment is essential for all systems. In order to assure optimal performance of your TitleExpress solution, please carefully review our [minimum system requirements](#).

## Solution Comparison Chart

TitleExpress offers the following four flexible solutions, allowing you to select only the features that you need:

- The **Settlement Solution** allows you to create, save, and print Closing Disclosure, HUD-1, or Settlement Statements.
- The **Production Solution** offers title document preparation and title insurance premium rate calculations.
- The **Professional Solution** integrates the Settlement and Production solutions with escrow accounting, reconciliation, and transfer tax calculations.
- The **Enterprise Solution** includes the features of the Professional solution with additional scanning capability, reporting functionality, and online transaction management.

TitleExpress Features	Settlement Solution	Production Solution	Professional Solution	Enterprise Solution	Cloud Hosting
Order Entry	✓	✓	✓	✓	✓
Workflow Management	✓	✓	✓	✓	✓
Calendar	✓	✓	✓	✓	✓
Title Insurance Rate Calculations		✓	✓	✓	✓
Transfer Tax Calculations	✓		✓	✓	✓
Closing Disclosure, HUD-1, Settlement Statements and Disbursements	✓		✓	✓	✓
Escrow Accounting and Reconciliation			✓	✓	✓
Document Management	✓	✓	✓	✓	✓
Outlook Email Integration	✓	✓	✓	✓	✓
PDF Document Creator	✓	✓	✓	✓	✓
<a href="#">Document Preparation</a>	✓	✓	✓	✓	✓
Management Reports		✓	✓	✓	✓
Policy Remittance Reports		✓	✓	✓	✓
Underwriter Jacket and CPL Integrations		✓	✓	✓	✓
1099-S Reporting			✓	✓	✓
Receivables		✓	✓	✓	✓
Complete Search Index Capability	✓	✓	✓	✓	✓
Amortization Schedule	✓		✓	✓	✓
<a href="#">RealExpress™</a>	✓	✓	✓	✓	✓
<a href="#">Desktop Hosted in SOC II Type II Certified Data Center</a>					✓
<a href="#">State and Underwriter Package Updates Included at No Additional Cost</a>					✓

## RealExpress™ Integrations

Our RealExpress™ integration platform offers a quick and efficient way to order products and services from top industry providers without ever leaving TitleExpress. RealExpress is available at no cost to TitleExpress users with a current Software Services Subscription with additions and improvements included in every release.

To find out how you can automate your processes with integrations for shipping, underwriters, and other service providers\*, visit our [website](#) or speak with your Regional Sales Manager.

### RealExpress Network Service Partners

Charles Jones®	PropertyInfo®
Digital Closing Docs™	QuickBooks™ (for receivables)
FasTrax™ Title Clearing	RedVision
FedEx®	RynohLive®
First American Title Insurance Company™	Safe Escrow®
Fidelity National Title Insurance Company	SureClose®
GreenFolders®	TitleWrite
Investors Title Insurance Company	TrustLink™
Kasparnet	UPS®
North American Title Insurance Company®	Westcor Land Title Insurance Company
Old Republic Title Insurance Company	Western Technologies Group, LLC
PayoffAssist.com®	WFG National Title Insurance Company®

\*List subject to change.

## TitleExpress Services

---

*Customize TitleExpress for how you do business. We offer an array of professional services to enhance the performance of your TitleExpress software and help you keep up with increasing demands for security and data analysis.*

### PRINTED PRODUCTS

TitleExpress compatible checks, deposit slips, and window envelopes are available directly from TitleExpress.

### CUSTOM CHECK DESIGN

Customize your TitleExpress check formats to accommodate MICR-encoded printing, including the addition of logos and signatures. If you purchase safety paper check stock from another vendor, our default SMS TitleExpress check format is also customizable.

### AUTO-CLEAR SETUP

TitleExpress includes functionality to automatically clear checks and deposits. Auto-clear saves valuable time by detecting discrepancies between bank transaction and escrow accounting transactions while automatically matching and tagging transactions. Formats for most banks are available.

### POSITIVE PAY SETUP

TitleExpress helps you avoid check fraud and helps keep your bank accounts secure by offering a positive pay utility for daily submission to your bank. TitleExpress check data is prepared in a format that is compatible to your bank's specifications to allow for an automated upload. For more information on supported banks and related costs, please contact your Regional Sales Manager.

### DOCUMENT CUSTOMIZATION

If you choose to add to our extensive standard forms libraries, we can help! Our Document Preparation Systems department provides an array of options for attractive and time saving merge documents built to meet your needs.

## Document Preparation System

---

### *Automatically merge order information into customizable Master Forms with the TitleExpress Document Preparation System.*

- Merge Sets speed the process of creating documents by allowing you to create document sets that merge multiple documents at once
- DPS Signature customizations allow you to automatically insert signatures into documents
- Your documents are easily converted to PDF and sent as email attachments
- Add your company logo, customize text, and create custom documents to complement your standard forms library

### STANDARD FORMS PACKAGES

TitleExpress offers the following three standard forms packages. You may also purchase Master forms individually. For a complete list of forms, please contact your Regional Sales Manager.

Package Type	Description	Unit Of Measure	Price
General	Includes a large selection of Master Forms that are typically applicable to any jurisdiction.	Per Package	\$300.00
State	Includes Master Forms and transfer and recording calculations for the state.	Per State	\$295.00
Underwriter	Includes Commitment, Owner and Lender Policies, Affidavits, Endorsements, Clauses (if available), and premium calculations.	Per Underwriter, Per State	\$395.00

### DOCUMENT CUSTOMIZATION SERVICES

TitleExpress provides Document Customization Services for customers who want assistance with modifying their own forms, or with adding new Master Forms and clauses to their library. Our document automation specialists are experts in the title and settlement industry. They bring a wide-range of experience and expertise to every assignment. We prepare a Statement of Work for each request to assure that all specifications are met. Commonly requested services include embedding signatures into Master Forms and creating one Master Form that can be used for multiple underwriters in multiple states.

### TITLEEXPRESS DOCUMENT MANAGER

The TitleExpress Document Manager feature offers a simple way to save and access documents electronically in your file. Drag and Drop any document, create PDF documents, view Microsoft Word documents, and more with the click of the mouse. Use Document Manager to easily attach files to emails for efficient communication with all parties.

# TitleExpress Cloud Hosting

---

***IT infrastructure and server-related expenses put an extra burden on small business. Our TitleExpress Hosted Solution enables you to grow without the costly commitment, while offering the same great features and integrations as our desktop software.***

## FEATURES AND BENEFITS

- Anytime, anywhere 24/7 data access with an internet connection
- Antivirus and malware protection and comprehensive whitelisting procedures
- Multi-factor authentication and industry-leading firewalls
- Built-in protection and disaster-recovery with file-level data restoration
- Automatic application updates performed on a regular basis
- SOC II data centers certified for system security, integrity, availability and NPI protection
- Maximum scalability—get new employees and offices up and running without adding additional servers, increased data storage capacity, or a complex wide-area network set up.

## DESKTOP APPLICATIONS

The TitleExpress Cloud desktop provides access to the following subscriptions:

- TitleExpress suite of software solutions
- Microsoft Office (Standard)
- Adobe® Reader
- Integrated/licensed applications\*
- Internet Explorer

[View System Requirements](#) for optimal performance of your TitleExpress Cloud Solution.

## PRINTERS

Printers must be Microsoft-supported in a terminal server environment. While most printers are supported, it is best to confirm with SMS before purchasing a new printer to verify that it will work.

## SCANNERS

Scanners must be TWAIN-compatible and require a third-party utility to allow direct scanning from your local workstation to TitleExpress Cloud. If the third-party utility is not certified, it must go through a certification process. [RemoteScan for Terminal Services](#) is a recommended utility.

*\*Must have valid license where applicable. Speak with your Regional Sales Manager for more information on system requirement*

## Training & Support

---

***There is no count-down clock—your investment includes unlimited support. Our experienced trainers and all-star support team use the latest technology to resolve your needs quickly and consistently.***

### LIVE WEBINARS

Each month, our training team conducts a series of live webinars on TitleExpress features and functions. Ranging from beginner to advanced level instruction, these interactive webinars are a great way to sharpen your skills from the comfort of your own office. We record many of these sessions for your added convenience.

### ONSITE TRAINING

If you prefer, our instructors can also fully address specific requirements and implement customizations—to a captive audience—in your office environment! To schedule training, please contact Training at 714-250-7096 or email us at [TEtraining@smscorp.com](mailto:TEtraining@smscorp.com).

### 24/7 ONLINE SUPPORT CENTER

The TitleExpress Support Center includes extensive Document and Video libraries for instant access to reference guides, tip sheets, short demos and full-length training webinars.

### LIVE CUSTOMER SUPPORT

Using state-of-the-art account technology, our Support team resolves requests quickly and consistently so you can focus on growing your title and settlement business. Your Software Services Subscription includes technical support during regular support hours—unlimited calls, program updates and maintenance releases, annually updated IRS 1099-S reporting modules, and frequently updated Help Files and User Guides.

Hours of Operation	8:00 AM-8:30 PM ET, M-F
Customer Support Phone	800-767-7831
Customer Support Email	<a href="mailto:TESupport@SMSCorp.com">TESupport@SMSCorp.com</a>

## Getting Started

---

***To request a quote, please call 800-767-7832 or email us at [sales@smscorp.com](mailto:sales@smscorp.com). After asking a few brief questions, we will propose a solution to meet your needs. We hope to welcome you soon as a new TitleExpress customer!***

Settlement Management Solutions (SMS), a division of First American Professional Real Estate Services, Inc., and PCN Network LLC make no express or implied warranty respecting the information presented and assume no responsibility for errors or omissions. FasTrax, First American Title, GreenFolders, iOrderExpress, PayoffAssist.com, RealExpress, SMS, TitleExpress, and TrustLink are trademarks of First American Financial Corporation and/or its affiliates. Safe Escrow is a trademark of PCN Network, LLC.