QuickScan — Blackacre's RESPA for Windows™

Use this QuickScan to get started quickly using *Blackacre's RESPA for Windows,* the automated residential closing software. For detailed instructions, see the *Blackacre's RESPA for Windows User Guide* or the program's online help.

Starting RESPA

On the Start/Programs menu, choose **Blackacre's RESPA for Windows**. The *Transaction* window for the workspace most recently used opens.

Main RESPA windows

Window	Use to	To open	Or click
Transaction	Create a new transaction. Open an existing transaction.	Choose **Transaction Window** on the View menu.	
Closing	Manage (add and remove) the participants to a closing. Build and maintain a database of borrowers, sellers, lenders, settlement agents, and real estate agents for use in any closing.	Choose **Closing Window** on the View menu.	
Property Information	Enter or edit property, tax, and loan information for new transaction.	Choose **Property Window** on the View menu, or click Property on the *Closing* window.	
County/State Calculation Codes	Customize the automatic calculation of taxes and assessments, prepaid interest, recording fees, mortgage tax stamp, and deed tax stamps.	Choose **County/State Calculation Codes Window** on the View menu, or click **Calc. Codes** on the *Closing* window.	

RESPA toolbar

Button	Name	Use to
	New	Create a new workspace where your work will be stored.
	Open	Open an existing workspace.
	Print	Select and print reports.
	Backup Workspace	Create a backup copy of the open workspace.
	Restore Workspace	Restore a workspace from a backup copy.
	View Transaction Window	Open the *Transaction* window for the open workspace.
	View Closing Window	Open the *Closing* window for the open transaction.
	View Property Window	Open the *Property Information* window for the open transaction.
	View Calculation Codes Window	Open the *County/State Calculation Codes* window for the open transaction.
	Help Contents	Open the online help at its first topic.

Getting help as you work

- Click the **Help** button on a window to open the window's topic. Or on the Help menu, choose:
  - **Contents** (or click on the toolbar) to open the online help at its first topic.
  - **User Guide** to open the User Guide PDF.
  - **Frequently Asked Questions** to open the Frequently Asked Questions PDF.
  - **Tutorial** to run the online tutorial.

Creating a new transaction

1. On the *Transaction* window, click **New**.
2. On the *New Property Information* window, complete the **Property Information**, **Tax Information**, and **Loan Information** tabs. (For field help, click the window's **Help** button.)
3. Click **OK** to save.
   The window closes and the *Closing* window opens. The transaction's number appears in the *Transaction Number* box at the far right of the toolbar.

Sorting transactions

On the *Transaction* window, click the heading of the column by which you want to sort transactions.

Opening an existing transaction

On the *Transaction* window, select a transaction and click **Open**. The transaction's *Closing* window opens, and its transaction number appears in the *Transaction Number* box at the far right of the toolbar.

Managing participants to a closing

On a transaction's *Closing* window:

- add a participant by selecting his or her name from the applicable participant list (*Borrower*, *Seller*, *Lender*, *Settlement Agent*, *Realtor*) and clicking **Add**.
- remove a participant by selecting his or her name on the *Closing Participants* list and clicking **Remove**.

Note: To add, edit, or delete participants from the RESPA database, use the **New**, **Edit**, and **Delete** buttons below the five participant lists.

Preparing HUD-1 forms

Note: For HUD-1 and HUD-1A, first use the *Aggregate Escrow Adjustment* utility.

1. On a transaction's *Closing* window, click **HUD-1**.
2. On the *HUD-1 Forms* window, select the HUD form you want to prepare, and click **OK**.
3. Complete the form as needed, clicking **Next>** to advance through it.
4. Click **Save** to save. Click **OK** to confirm. Click **Close** to close the form.

Creating and printing checks and receipts

Note: First prepare the necessary HUD-1 forms.

1. On the transaction's *Closing* window, click **Checks**, or choose **Checkwriting** on the Utilities menu.
2. On the *Checks/Receipts Manager* window, use the:
   – **Checks** tab to create and print checks.
   – **Receipts** tab to create and print receipts.

Deleting a transaction

Note: Deleting a transaction permanently removes it from RESPA. Consider deactivating it instead.

1. On the *Transaction* window, select a transaction and click **Delete**, and then click **OK** to confirm the deletion.
2. When prompted if you want to delete or save any related 1099 data, respond appropriately.
3. If you selected the open ("in use") transaction to delete, click **OK** to confirm that you are sure you want to delete it.

Deactivating a transaction no longer needed

Rather than deleting a transaction you no longer need, consider deactivating it. On the *Transaction* window, select a transaction and click **Deactivate**. Now filter the *Transaction* window to show only active transactions by selecting **Active** under *Display Transactions*.

RESPA report modules

Report module	Use to
RESPA reports	Generate buyer and seller statements and W9 reports for buyers and sellers from closing transaction information.
Management reports	Generate transaction overview reports that combine closing transaction information with additional information required by the report, such as the *Post Closing Payoff/Discharge* report.
Fixed Rate Notes	Collect information from closing transactions and generate the FNMA and FHA Multistate Note as well as FHA state-specific notes.
ALTA	Prepare standard title insurance forms that combine closing transaction information with additional information such as title requirements, exceptions, and legal descriptions.
1099 Record Management	Manage, validate, import, export, and print 1099 records generated from closing transactions or manually entered data.

RESPA utilities

Utility	Use to
Aggregate Escrow Adjustment	Set up the Aggregate Escrow and Adjustment Information and Calculation used for HUD-1 and HUD-1A forms.
Amortization	(1) Determine how paying off a mortgage early will affect the monthly payment and payoff balance. (2) Create and print an amortization schedule for manually entered mortgage values.
Checkwriting	Prepare checks and receipts.
Mail Merge	Link RESPA data to a Microsoft Word document for printing form letters or envelopes.
Payment Calculator	Compare standard monthly payments to balloon payments.
Auto-Complete Edit Window	Delete items that were automatically saved by RESPA to facilitate fast data entry when they are no longer needed.

West customer technical support

Call **1-800-848-3475**, 7:00 a.m.–8:00 p.m. Central Time, Monday–Friday.

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