

# Quick Reference Guide



## Access and Login to Realfast2Go™

- Access Realfast2Go** First time, go to [www.realfast2go.com](http://www.realfast2go.com). Click the **Ribbon bar** and select **Download Files...** then click the **Run** button. Next time, you can use the Realfast2Go shortcut added to your Desktop.
- Login to Realfast2Go** Enter your **Email Address** and **Password (case sensitive)** then click the **Login** button. **Package updates** will install in the background, if necessary, while you begin working.

## Create, Edit and Print Forms

- Create New Folder** Click the **Create New Folder or Template** option from the Main Menu. Enter a **New Folder Name**, click a **Package Name** to display available forms. Click **Form Names** to add them to the new **Folder**. Click **Next**.
- Add Parties** Select **Client Type** and **Entity Type** then **enter the Party's information**. Click **Save** and **repeat prior steps** to add additional parties to the transaction. When done, click **Finished**.
- Edit Forms** Click a **Form Name** to display the content for editing. Enter form data, using **Form Tools** (Calendar, Loan Calculator, Spell Check), as necessary. **Right-click** fields to select **Override, Insert N/A, Insert None** or **Insert Clause**.
- Validate Form** Verify form completion by selecting **Validate Form**. Fields with **missing or invalid content** will display a **red highlight**. Correct fields as indicated. Click **Stop Form Validation** when done. **Save Form** and repeat for all other forms in the folder.
- Send Forms** While connected to the Internet, select **Send Forms** then check the forms to be included. Click **Continue with Selected Forms**. PDF versions of the forms will be created. Depending on your e-mail program, select **Outlook** or **Other** when prompted.
- The **Outlook** option will create a new email message with the selected PDFs attached. Just address the e-mail and send.
  - The **Other** option will display content that should be copied and pasted into a new e-mail message that you create.
- The **Password** provided to access the forms is good for only **7 days**.
- Preview Form** Click a **Form Name** then select **Preview Forms**. Select the **Printer** icon to print the entire form or a portion of it.
- Print Form** Select **Print Form** and use the **Form List** to choose the forms to be printed. Select the Output options, Printer, and number of Copies. Click **Print** to begin the output.
- Create PDF** To save the forms in **PDF** format, select the **Create PDF** option and use the **Form List** to choose the forms to be converted. Select the Output options then click the **Create PDF button**.
- Double click a file in the top section of the **My PDF Library** window to view that PDF. To view all the PDF files, right click a file in the bottom section and select **Open PDF Folder**. By default, the files are saved in the **My Documents** folder in the **Realfast2Go\_PDF\_Forms** sub-folder.

<b>Editing Folder</b>	Select <b>Existing Folders</b> , click the name of the folder to be edited, and then select <b>Edit Folder</b> . <ul style="list-style-type: none"> <li>To <b>Add</b> additional forms, select the new forms from the available <b>Packages</b> or <b>Templates</b>.</li> <li>To <b>Remove</b> forms, double click the form name in the bottom right section then select <b>Delete</b> when prompted.</li> </ul>
<b>Editing Parties</b>	Select <b>Existing Folders</b> , click the name of the folder to be edited, and then select <b>Edit Parties</b> . <ul style="list-style-type: none"> <li>To <b>Edit</b> an existing party, select the party from the <b>Party List</b>, revise the information and then click <b>Update</b> to save the changes.</li> <li>To <b>Add</b> an additional party, select the <b>Client Type</b> and <b>Entity Type</b> then enter the information about the new party and click <b>Save</b>.</li> <li>To <b>Remove</b> a party, select a party from the <b>Party List</b>, and then click <b>Delete</b> and <b>OK</b>.</li> <li>To <b>Reorder</b> the parties, select a party from the <b>Party List</b>, change the number in the <b>Name Order on Form</b> field to reflect the desired position on the forms then click <b>Update</b>. Repeat steps to reorder other parties.</li> </ul> <p>When all edits to the parties are complete, click <b>Finished</b>.</p>
<b>Archive Folder</b>	Select the <b>Folder</b> to be archived. Click the <b>Archive Folder</b> option. When prompted to verify the action, click <b>OK</b> to complete the archive.
<b>Accessing Archived Folders</b>	While connected to the Internet, click <b>Archived Folder</b> to reveal previously archived folders. Select the desired folder and click the <b>Unarchive</b> button to move the folder back into the <b>Existing Folders</b> list.

## Manage Clause Library (Edit functionality available in “Connected” mode)

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<b>View or Add Libraries</b>	Select the <b>Manage Clauses</b> tab. Click on any existing <b>Library</b> to view its list of clauses. Double click the <b>&lt;Double Click Here to Add a Library&gt;</b> option to start a new library then enter a name for the new library. Click <b>Next</b> to add Clauses or <b>Finished</b> to save the library without Clauses. <p><b>Note:</b> Office Administrators may add <b>Libraries</b> with <b>Clauses</b> for the entire <b>Office</b>.</p>
<b>Edit Library</b>	Double click a Library to edit the <b>Library Name</b> . Select the <b>Add New Clause</b> button to enter a new <b>Clause Title</b> and add the <b>text</b> . Click <b>Finished</b> when done.
<b>Edit Clause</b>	Double click a <b>Clause</b> to edit the <b>Clause Title</b> or <b>text</b> . Click <b>Update</b> when finished.

## Manage Account (available in “Connected” mode only)

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<b>Edit User Information</b>	Select the <b>User Name</b> to populate the current account information. Make any necessary changes to the Name, Contact Information, License Information, or Login Information. Click <b>Update</b> when finished. <p><b>Note:</b> Office Administrators may <b>Add New User</b>, change <b>User Status</b>, and update <b>Office Information</b> from this page.</p>
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