

Contact Us:
800.326.4842

itracs@invtitle.com

[Request Assistance](#)

[Schedule Training](#)

Changes?

Let us know if anything changes with your bank account or server setup so that your iTracs service continues uninterrupted. Some changes require re-installing or changing settings in the Rynoh software. Call us in the event of any of the following:

- New bank or bank account
- Upgrade in your settlement software
- Change of settlement software platforms
- Server upgrade or outage

Simplify the process of paying your monthly iTracs invoice by registering for credit card payments. For more information, click [here](#).



Our services don't stop with the software.

We offer audit preparation services, account clean-up services, and more!

We understand our customers have different needs. iTracs offers three distinct service levels:

- **Basic**
- **Enhanced**
- **Premium**

Learn more [here](#).

Tips & Tricks | Adding Comments to Transactions

The RynohLive[®] software provided in conjunction with your iTracs service provides the ability to add comments to book transactions and bank transactions within the application, enabling you to reference important comments, now and in the future. In addition, you have the option of printing these comments with your monthly reports.

First, you must enable comments, using these steps:

- In the *RynohAdmin* tab, select Company Profile and check "**Enable comments on transactions**" in the "Comments" section.
- Save this setting by selecting Submit Changes.

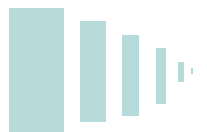
After you have enabled comments, a comment box will appear online each time you select a transaction on a report while viewing it online. You may add a comment by typing in the comment box provided and then selecting Add. After you have added a comment, it will appear anytime you subsequently view the transaction. You can later edit or delete the comment, if necessary.

If you wish to view comments on your reports, select "**Show transaction comments on monthly reports**" in the *RynohAdmin* tab. Comments are displayed on reports as follows:

- Morning Report: Comments will be displayed for transactions underneath the "Comment" section of the morning report. This feature provides efficiency by saving time when reviewing transactions and file balances on the daily report. It also provides multiple recipients the ability to see important information on transactions.
- Ledger Audit Report: Comments can be found underneath the "Comment" section of the Ledger Audit Report on the individual ledger. It is a useful tool to document transaction descriptions and file balances.
- Monthly Reports: Comments can be found underneath the "Comment" section for each of the monthly reports found in your monthly reconciliation package. By providing a description of transactions, this feature makes your review of these reports easier. It also provides an explanation of transactions in advance to any party that may be conducting an audit of your reconciliation.

For more information on how to use these helpful tools, contact us at itracs@invtitle.com.

Monthly Process



Key dates for the May reconciliation process are as follows:

- Wednesday, **May 31**: Statement cut-off.
- Thursday, **June 1**: Download your bank statement from your bank and upload it to Rynoh. Confirm your bank balance using the Reconciliation Wizard.
- Monday, **June 5**: Preview reconciliation delivered.
- Monday, **June 5**, through Friday, **June 9**: Work to clear exceptions on preview reconciliation.
- Saturday, **June 10**: Final reconciliation package delivered.

Be sure to resolve any exceptions shown on the preview reconciliation prior to **June 10** so your final reconciliation is accurate and complete.

Also, ALTA Best Practices and some state bars, including North Carolina, require a member of firm management or the attorney responsible for the trust account to personally review the account reconciliation. In addition to it being a requirement, a personal review is one of the best ways to reduce the opportunity for undetected fraud on your account.

Use the iTracs [checklist](#) to facilitate the review of your account. After you have completed your review, sign the checklist in the space provided and file it with your reconciliation. Regular adherence to this practice will ensure preparedness in the event your account is selected for audit and will provide an additional opportunity to identify any potential issues with your account on a timely basis.



News

- iTracs will join Investors Title's Cyber Security Seminars in July, which will cover current cases, cyber-fraud precautions, and more:

Tuesday, July 25, Atlanta, GA | Thursday, July 27, Columbia, SC

- Please find access to these valuable SoftPro® tools here: [ProTrust Overview](#) & [Help Resources](#).

- **New daily reporting options are now available on the following reports:**

Cleared transactions, outstanding transactions, book transactions, negative balances, positive balances, funds transfers, missing checks, and voided transactions. [Click here](#) to learn how to add and schedule these reports.



“The iTracs team is always very helpful and responds immediately to questions we have. They are very knowledgeable and can always solve our problem. We highly recommend the iTracs service and, more importantly, the team behind it!”

Marcy Benson
Michael Johnson & Associates
Fort Mill, SC

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