

How to Order A Resale Package, Lender Mortgage Questionnaire or related documents

If you have any issues with the use of the Community Archives website or registering, contact Community Archives Customer Service 1-800-995-0682.

Step 1: Go to www.legumnorman.com it will automatically redirect you to <https://www.associaonline.com/locations/legum-norman>

Step 2: Click on **Order Resale Documents** (circled in red). This will take you to another screen, Community Archives.

The screenshot shows the Associa website interface. At the top, there is a navigation bar with several menu items: MY ACCOUNT, ORDER RESALE DOCUMENTS (circled in red), LIVING BETTER BLOG, COMING HOME MAGAZINE, and REQUEST A PROPOSAL. Below the navigation bar, there is a search bar and a language selector set to English. The main content area features the Associa logo and several service categories: Why ASSOCIA, Management SERVICES, Maintenance SERVICES, Real Estate SERVICES, and Technology SOLUTIONS. A search bar is also present with the text 'FIND/CONTACT YOUR BRAN' and a dropdown menu for 'City/State/Province/Zip'. Below the search bar, there is a question: 'Would you like to save this location for future visits?' with 'Yes' and 'No' buttons. The main content area displays the location 'Legum & Norman' with a 5-star rating and 55 reviews. Below this, there is a large image of a modern building and a 'MY ACCOUNT' section with a description of TownSq and an 'ACCOUNT LOG IN' button.

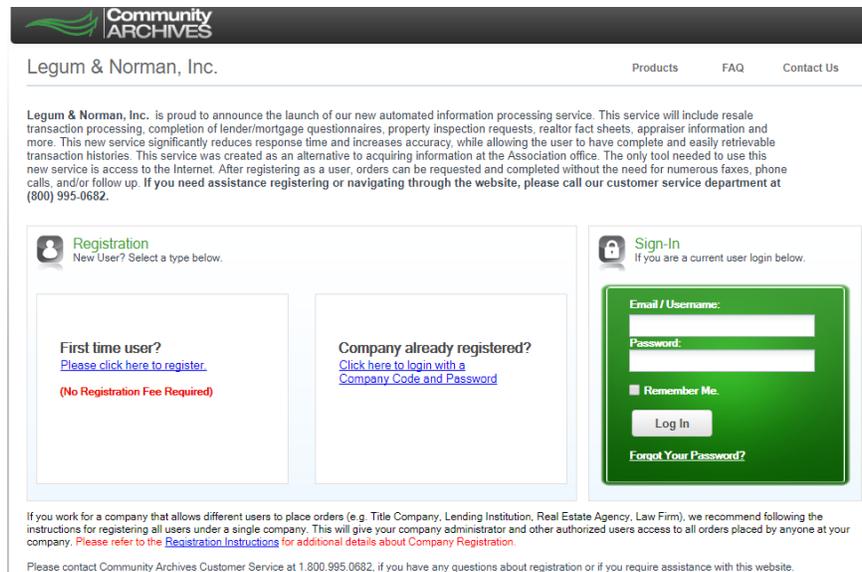
Step 3: On the Community Archives Page, scroll through the list until you find 'Legum & Norman, Inc.' and click on that listing.

- Equity Management
- Homeside Properties
- Houston Community Management Services
- HRW, Inc.
- Kramer-Triad Management Group LLC
- LandArc Inc.
- Legum & Norman, Inc.
- Marquis Association Management

Step 4: You are now on the login page for Community Archives.

If you already have a User name and password, please utilize the green box to input that information and proceed to login. **Skip to step 7.**

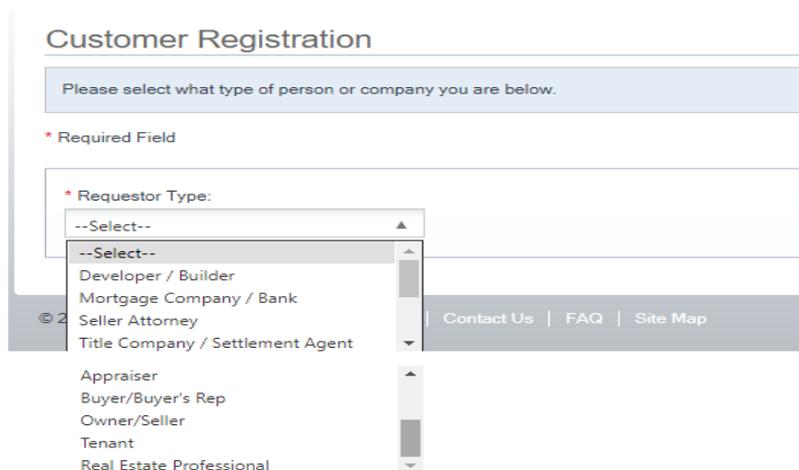
If you have never placed an order before, you will need to register as a **First Time User** on the left side of the screen. It is free to register. **Go to step 5.**



Step 5: First-time users will need to select a Requestor Type. The Requestor Type determines what products are available to you. Please scroll through the list and select the one that you need.

- If you are with a company that may need to order both Resale Disclosure Packages and Lender Questionnaires over time for different clients, please choose the requestor type **Real Estate Professional**. This gives the broadest range of products to choose from.
- If you need a Resale Disclosure Package you should register as an **Owner/Seller** or **Real Estate Professional** to see the full list of available products.
- If you need a Lender Questionnaire you should register as a **Mortgage Company/Bank, Title Company/Settlement Agent, Buyer/ Buyer's Rep** or **Real Estate Professional**
- The only time you will need to select **Developer/Builder** is if you are doing a first closing sale.

See image below of what requester types are available.



Step 6: Once you select your requestor type you will be brought to the next screen to register, fill out all fields to complete registration.

The screenshot shows the 'Customer Registration' page for Community Archives. At the top left is the logo, and at the top right is the word 'Welcome'. The main heading is 'Customer Registration'. Below it is a light blue box with the text 'Please enter the following information about yourself.' A red asterisk indicates a 'Required Field'. The first field is 'Requestor Type' with a dropdown menu showing 'Owner/Seller'. Below this is a section titled 'Enter Your Name, Email Address, and Contact Information' with a note: 'This email address will be your username to log in to Community Archives. You will always receive a copy of your order at the registered email address.' This section contains six input fields: First Name, Last Name, Phone Number, Email Address, Confirm Email Address, and Fax Number. The phone and fax number fields have a format '() - - x'. The final section is 'Create Password' with a note: 'Password must begin with a letter and contain at least 1 number and 1 capital letter, and be at least 8 characters in length (No special characters such as @, #, %, ^, *). Password is case sensitive.' It includes 'Password:' and 'Confirm Password:' input fields.

Step 7: Once your registration is complete or if you have logged in with an existing account, you will be asked to enter at least three valid characters contained in the community's name.

- Make sure you select the community that is in the state that you are ordering for (there are several communities with the name “Bayside” in both DE & MD, “Colonial Village” in MD & VA, etc...).
- If you are unsure of the Community name, please reach out the management office.

The screenshot shows the 'Products' page for Legum & Norman, Inc. The top navigation bar includes 'Shopping' (highlighted in green), 'Orders', 'Account', 'Help', and 'Logout'. The 'Products' heading is on the left, and 'Legum & Norman, Inc.' is on the right. Below the heading is a light blue box with the text: 'To order a product, enter at least three valid characters contained in the community's name and wait for the list to display. Select the desired community to continue shopping.' To the right of this text is an empty search input field.

Step 8: After selecting your community name, a list of products will show up on the screen.

- Review each product and the list of what each product contains to ensure you are getting everything you need.
- You can view a product sample by clicking the green 'Product Sample' under the order button.
- Lender Mortgage Questionnaire - our standard form with the most common questions answered
 - If you have a specific (**custom**) form from the lender to complete, you will need to add on the custom form option (see below instructions). Custom forms require an additional fee.
- Click **Order Now** to the right of the product you would like to order.
- Once you have clicked the Order Now button, confirm your order and click continue shopping.

Products Legum & Norman, Inc.

Sample DE Community

This is not a real community. All orders will be treated like test orders that will be cancelled eventually. This community is only used for validating product setups and forms that are applicable to communities located in Delaware only.

Select a product to order

 Resale Disclosure Package WITH CCI <small>To be ordered at resale by Owner/Seller or their agent. Package includes Resale Disclosure Certificate, Statement of Account, Covenants Compliance Inspection, Escrow Instructions, Governing Documents, Budget, Financials/Audit, Reserve Study and Insurance Certificate.</small>	Order Now > Preview Sample
 Resale Disclosure Package WITHOUT CCI <small>To be ordered at resale by Owner/Seller or their agent. Package includes Resale Disclosure Certificate, Statement of Account, Escrow Instructions, Governing Documents, Budget, Financials/Audit, Reserve Study and Insurance Certificate.</small>	Order Now > Preview Sample
 Statement of Account <small>Statement of Account includes a detailed description of all current assessment balances and Escrow Instructions.</small>	Order Now > Preview Sample
 Refi Only / Statement of Account <small>To be ordered during a refinancing only. Not for use during resale or first time closing. Includes special (limited) Escrow Instructions.</small>	Order Now > Preview Sample

Order Information Legum & Norman, Inc. - Sample DE Comm

Resale Disclosure Package WITHOUT CCI - \$150.00
* Required Field

Property Information
Property Address (include unit # as applicable)* Closing Date

Seller Information
Seller's Name* Selling Price Forwarding Mailing Address
City State/Province Zip

New Buyer Information
Buyer's Name (if unknown, enter "Unknown")* Will the Buyer occupy the property? Yes No **If no, please provide an alternate address**
Buyer's Mailing Address* City* State/Province*
Zip Code* Telephone Email Address

Title Company Information
Contact Name* Contact Telephone* Escrow Number*
Contact Email Address Comments

Delivery
Select Format: --Select--
Delivery Cost: **\$0.00**

Delivery Addresses
Default Email
Additional Email

*****Screenshots for demonstration purposes only, some options and pricing vary by state and product*****

Custom Form - Lender Mortgage Questionnaire

- Select Lender Mortgage Questionnaire

Lender Mortgage Questionnaire WITH CCI
Includes Lender Questionnaire, Covenants Compliance Inspection, Insurance certification information and Budget. Custom lender form processing available as option when ordering a lender questionnaire. View a sample Lender Questionnaire.

Lender Mortgage Questionnaire WITHOUT CCI
Includes Lender Questionnaire, Insurance certification information and Budget. Custom lender form processing available as option when ordering a lender questionnaire. View a sample Lender Questionnaire.

- Fill in Order Information
- Once you hit **Order Now** next to the Lender Questionnaire you will be taken to the order screen.
- Under 'Product Add-ons' (circled in red) check the box for 'Custom Lender Questionnaire'. There will be an additional fee **(the amount varies by state)**.

Order Information Legum & Norman, Inc. - Sample DE Community

Lender Mortgage Questionnaire WITHOUT CCI - \$125.00
* Required Field

Property Information
Property Address (include unit # as applicable)* Owner's Name*

Product Add-ons
Please select any additional items for the order:

Item	Price
<input type="checkbox"/> Custom Lender Questionnaire	\$125.00

Delivery

Select Format:

Delivery Cost: \$0.00

Delivery Addresses

Default Email

Additional Email

[Add](#)

Selected Delivery

Select Delivery Turn Around Time:
 5 - 10 Business Days 9 - 32 Business Hours, +\$75.00

Step 9: On the Order Information Screen

- Fill in all the requested fields. Those marked with a red* (asterisk) are required fields.
- Choose a Delivery Format
 - Email is the most common. Two email addresses can be entered to receive the order documents. Once you receive the email, it can be forwarded to any other party that needs the information.
- Choose a Delivery Turn Around Time
 - When selecting your delivery turn around time, please note if the times listed are Business days or Calendar days (varies by product and state).
 - Please note that Saturdays, Sundays and holidays are not included, and non-office hours are not included in the calculation. Normal Office hours are Monday – Thursday 8:30 A.M. – 5:00 P.M. and Friday 8:30 A.M. – 4:00 P.M.

*****Screenshots for demonstration purposes only, some options and pricing vary by state and product*****

- Common mistakes in filling out this screen include incorrect property addresses, incorrect owner’s names, seller name in buyer field and vice versa. Please take care to input this information carefully and make sure it is correct. Incorrect information can delay the processing of your order or cause an order to be canceled.
- If there are questions you don’t have answers to, such as escrow number, or some of the buyer information you can put “unknown” in those fields.
- Please note, if you need the order immediately you will need to select the expedite option for an additional fee.
- Once you have completed the fields on this screen, click on Checkout and follow the prompts to complete your order.

Step 10: After you hit **Checkout** you will be brought to the following screen. Here you will choose your payment method under ‘Payment Information’.

Order Checkout Legum & Norman, Inc. - Sample DE Community

Summary

Product: Resale Disclosure Package WITHOUT CCI	Processing Fee:	\$150.00
	Tax:	\$0.00
	Convenience Fee:	\$10.00
	Total Cost:	\$160.00

Payment Information

Payment By:

3rd Party Credit Card
 Check In Advance
 Credit Card

*Please note an on-line, non-refundable Convenience Fee of \$10.00 has been applied to the Total Cost above.

- **Credit card payments** (3rd Party Credit Card & Credit Card) - will add a convenience fee to the order.
- **Check in Advance** -no convenience fee however, the order cannot be processed until payment has been received. Delayed receipt of the check may delay delivery or your order.
- Once you have entered your payment option, hit complete purchase.
- You will than receive an email with your order number.

*****Screenshots for demonstration purposes only, some options and pricing vary by state and product*****