

# Quick Start User Guide

Including System Options, Initial Setup and  
Instructions for Completing a Filing

PARASEC



# Introduction

There is more to filing a UCC than completing the form. Managing jurisdiction requirements, calculating fees, writing checks, ensuring completed acknowledgements are returned and tracking expiration dates are only a few of the many steps that filers must juggle. With UCC eZFILE® you are just moments away from eliminating these tasks so you can concentrate on more important activities.

## Online Does Not Mean Alone, Help is only a Phone Call Away. 800.533.7272

### What is Not Covered in this Guide?

This guide is intended for users who want to start creating filings immediately and have a general knowledge of UCC Forms. UCC eZFILE® has many additional features that are not covered in the eZStart Guide. If you would like more detailed instructions of the features and benefits contact your service representative, or attend a product training session to utilize all of the time saving features.

“I just finished 110 UCC filings tonight and I wanted to say I love UCC eZFILE®”

Credit Officer  
Major California Bank

### Getting Started

Enter your login information and **Password** provided to you. Press the *Submit* button.



# Home Page & Dashboard of Private Website

From the private side of our website you can navigate between the private and public pages. Clicking on any of the headings in the **Public Navigation Bar** will move you to the public pages.



Click on **My Account Dashboard** at anytime to return to the pages only accessible after logging in.

Navigation on the website occurs through the account dashboard. If at any time you confused as to what page of the system you are in look for the My Account Dashboard to navigate back to the area of the system in which you would like to work.

Next click on **UCC eZFILE®**.

The **My Information** page will be displayed with the **User Preferences** tab open and ready for use. You are now ready to begin using **UCC eZFILE®**



# Setting Preferences in UCC eZFILE®

If you do not have a password access can be provided in just minutes. Contact your service representative at 800.533.7272 to register for access.



Changing User Preferences within UCC eZFILE® will not update account information maintained at PARASEC. Contact your Account Executive for permanent changes to your account information.

## Opening Screen for UCC eZFILE®

From the opening screen you can customize the system to prevent having to enter redundant information with each filing created. We recommend that you customize the system the first time you login so all your preferences are captured.

The system allows you to enter processing instructions so that it can automatically document those instructions when a filing is submitted. If you setup the system now you will not be required to make selections each time a filing is submitted. Do not be concerned about the instructions preventing you from making changes as you can edit the instructions at any time. When situations change UCC eZFILE® allows you to make temporary changes without effecting your standard order.

From the *My Information* tab, you can make changes to any of the following information:

- Information displayed on the screen
- E-mails sent by the system
- E-filing preferences
- Filing validation and help screens

You have further options in the system located on an additional three tabs:

- Frequently used debtor /secured party names (*Address Book*)
- Frequently used collateral descriptions (*Collateral Book*)
- *Cover letter* and mailing instructions.

This guide is intended to assist in submitting filings as soon as possible. therefore, only instructions for the *Collateral Book* and *Cover Letter* have been included. The *Address Book* functions in exactly the same manner, therefore, the guide should provide enough information to setup this section without additional instructions. If you require additional assistance please call us at 800.533.7272.

The screenshot shows the 'My Information' page with the 'Collateral Book' tab selected. The left side contains an 'Edit' button and various text input fields for user information. The right side features three sections of checkboxes for configuring search results, email notifications, and other options. The 'Save' button is visible at the bottom right.

## Setting Up the Collateral Book in UCC eZFILE®

Upon first access to the *Collateral Book* there will be no descriptions in the system. Without collateral descriptions, you will not be able to insert descriptions into a filing without re-keying the information, which results in more typing for you.

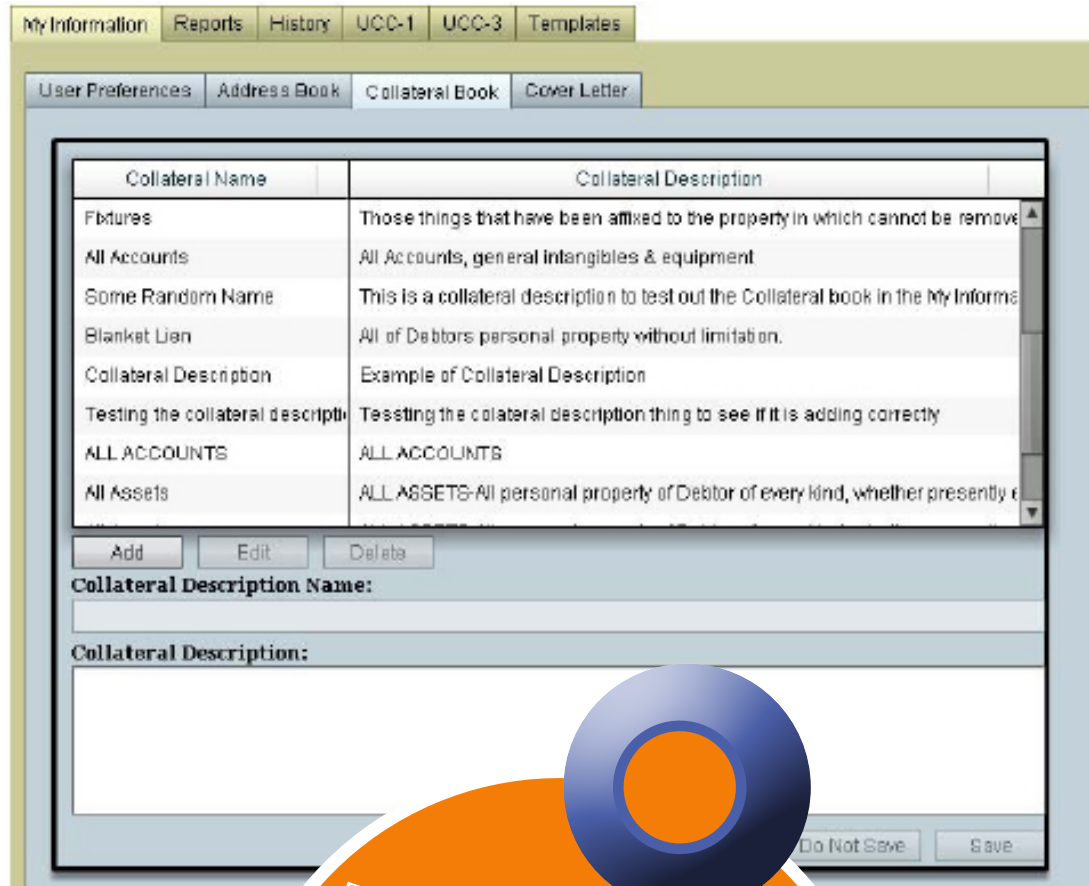
Make your job easier and setup your frequently used collateral descriptions so you will no longer have to type them in for each filing. To add a collateral description:

- Press the *Add* button
- The screen will become editable
- Key your collateral information into the system
- Give your collateral description a name
- Press *Save* to save the description into your *Collateral Book*

With UCC eZFILE® you can save an unlimited number of collateral descriptions. Collateral descriptions can be added while typing a filing.



An explanation as to how to insert a collateral description while typing a filing can be found in the section “Saving a Collateral Description While Typing a Filing” beginning on page 12.



**Time Saver**  


Provide unique names to your collateral descriptions to easily distinguish them from one another. To quickly locate the statement you want to use.

**Time Saver**  


Only a small change required to a collateral description? Use the collateral book to add your standard description then make edits without changing what is stored in UCC eZFILE. This is a great time saver for adding serial, model or other information that changes per filing.

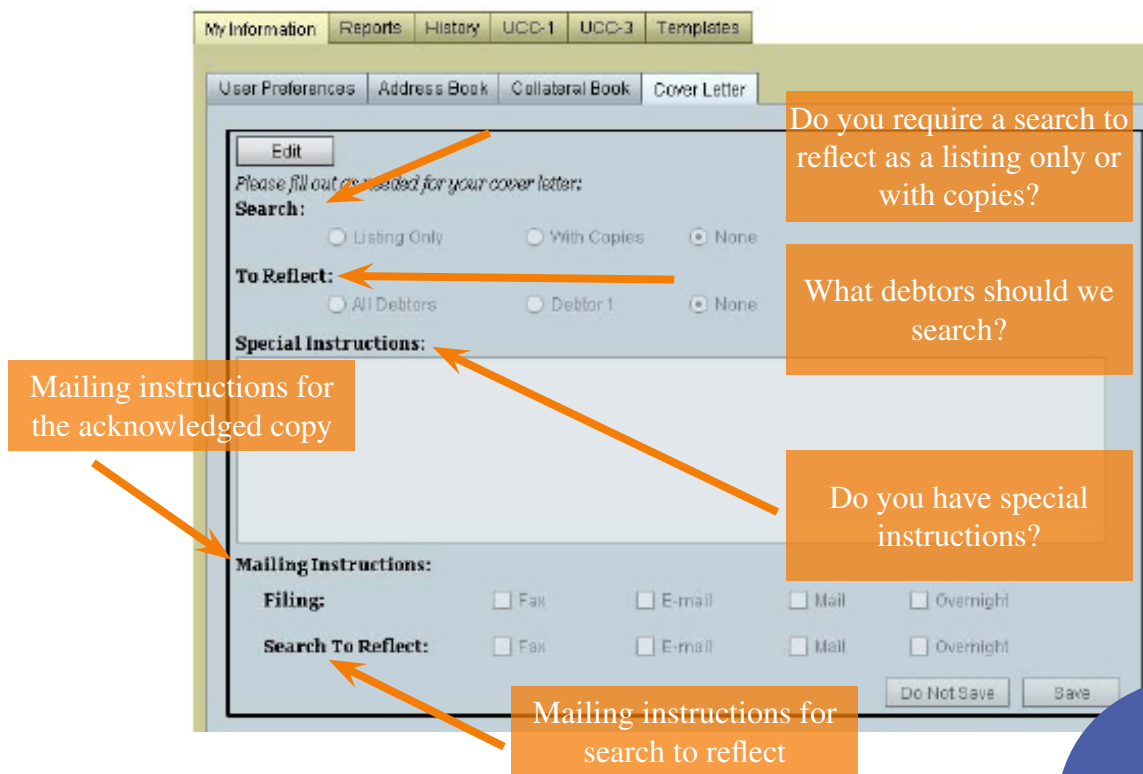
# Cover Letter Instructions in UCC eZFILE®

The *Cover Letter* is your instructions to us for processing your work. It enables us to quickly process your orders as it includes the following:

- How to return the acknowledged copy
- If you require a search to reflect
- Special requests you may have

To edit your default *Cover Letter* instructions:

- Navigate to the *Cover Letter* tab located under the my preferences tab.
- Click on the *Cover Letter* tab
- Click *Edit* to edit the information



Options available on the *Cover Letter*:

- Search - listing only or with copies if search is ordered.
- To Reflect (all debtor or primary debtor only)
- Mailing Instructions for filing
- Mailing Instructions for search

When you first access the cover letter page all options will be set to none with no mailing instructions selected.

For the options *Search* or *To Reflect* if you select *None* you are indicating to us that you do not wish to order a search to reflect the filing after the filing has been filed.

...Parsec [staff] has always been helpful and positive. Your representatives excel at customer service even when we have tight time frames.

Title Officer  
Major Title Company

## Mailing Options

The system will allow you to select multiple shipping options not only for the UCC filing, but also the search to reflect.

The options for shipping are:

- Fax
- e-Mail
- Mail (First Class)
- Overnight Mail

Additional fees may apply to options selected. Please check with your customer service representative for information.

### NOTE

Regardless of the mailing instructions selected a copy of the “system generated” acknowledgement is e-mailed once recording information is received. Marking e-mail on the *Cover Letter* indicates that you wish to receive a scan of the *Official Acknowledgement* via e-mail once it becomes available.

## Creating Your First Filing in UCC eZFILE®

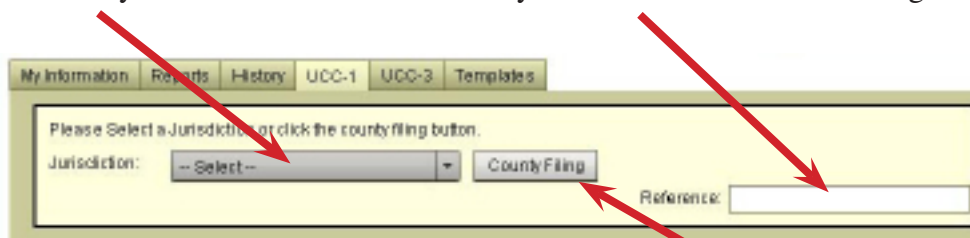
The UCC eZFILE® system mimics the National UCC-1 Form. As a result, completing filings in the system can be completed quickly by most users with little training. There are only a few steps users must become acquainted with to submit the filings and use all of the features of the system.

To begin your filing click on the tab that reads UCC-1. This tab appears at the top of every screen within the system. Regardless of the screen you are in you can quickly begin filing.

The screenshot shows the UCC eZFILE system interface. At the top, a navigation bar contains tabs for 'My Information', 'Reports', 'History', 'UCC-1', 'UCC-3', and 'Templates'. Red arrows point to the 'UCC-1' and 'Templates' tabs, with a note stating: 'Navigation bar is displayed on all primary screens throughout the system.' Below the navigation bar, there are sub-tabs for 'User Preferences', 'Address Book', 'Collateral Book', and 'Cover Letter'. The 'User Preferences' form includes an 'Edit' button and fields for 'Full Name:', 'Company Name:', 'Address:', 'City:', 'State:', 'Zip Code:', 'Country:', 'E-mail:', 'Alternate E-mail:', 'Phone:', and 'Fax:'. To the right of these fields are three sections of checkboxes: 'Columns you wish to appear in your results:' (with options: All, Filing Type, File Number, Original File Number, Jurisdiction, Entity Name, File Date, Status, Reference Number, E-file / Standard), 'E-mails you wish to receive:' (with options: Automated continuation alert e-mails, Automated draft e-mails, Automated submit e-mails, Automated acknowledgement e-mails), and 'Other options:' (with options: E-file my filings whenever possible, Validate my filings upon Submit, Validate my filings upon Draft, Show eZ Tips). At the bottom right of the form are 'Do Not Save' and 'Save' buttons.

## Filing at the State Level

Select the state you would like to file in and key a reference number for billing.



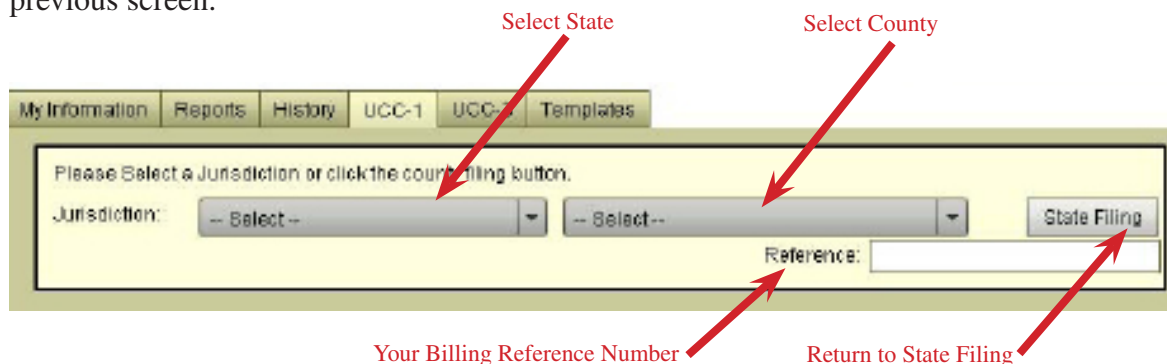
The screenshot shows a web interface with a navigation bar containing 'My Information', 'Reports', 'History', 'UCC-1', 'UCC-3', and 'Templates'. Below the navigation bar is a yellow box with the text 'Please Select a Jurisdiction or click the county filing button.' Inside this box, there is a 'Jurisdiction:' label followed by a dropdown menu currently showing '-- Select --'. To the right of the dropdown is a button labeled 'County Filing'. Further to the right is a 'Reference:' label followed by an empty text input field. Three red arrows point to the dropdown menu, the 'County Filing' button, and the 'Reference' input field.

If you will be recording your filing in the county press *County Filing*, do not select a *jurisdiction* (state) before pressing this button. If you select *jurisdiction* (State) prior to pressing *County Filing* you will need to either press the link to re-enter UCC eZFILE® or navigate back to the UCC filing form to reset the form.

**If Creating a County Recording Continue  
Otherwise Skip to Next Section**

## Recording at the County Level

Once you have pressed the *County Filing* button the screen will change to county filing mode. From this screen you will select the state and county you would like to file in. If you have accidentally entered this screen you can press the *State Filing* button to return to the previous screen.

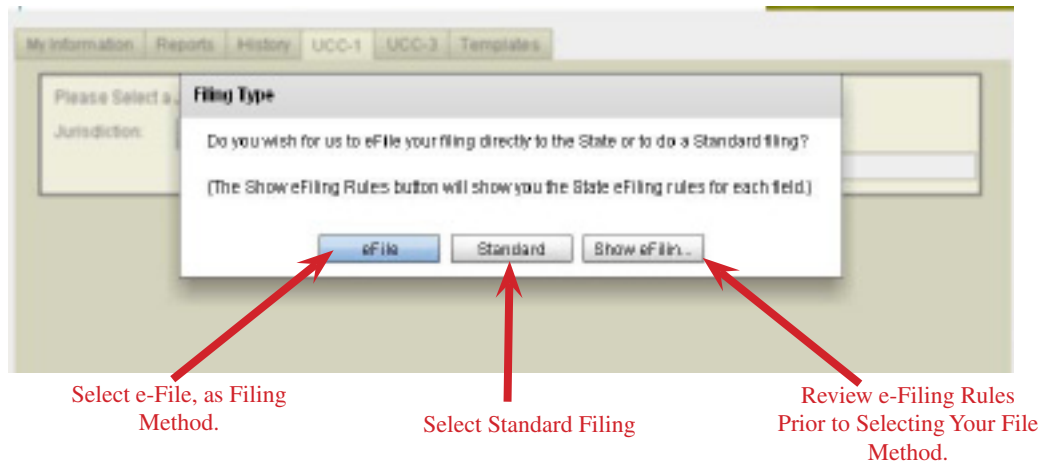


The screenshot shows the same web interface as the previous one, but now in county filing mode. The 'Jurisdiction:' label is followed by two dropdown menus, both currently showing '-- Select --'. To the right of the second dropdown is a button labeled 'State Filing'. Below the dropdown menus is a 'Reference:' label followed by an empty text input field. Four red arrows point to the first dropdown menu (labeled 'Select State'), the second dropdown menu (labeled 'Select County'), the 'Reference' input field (labeled 'Your Billing Reference Number'), and the 'State Filing' button (labeled 'Return to State Filing').

After selecting the State and County in which to file the system will take you to the electronic version of the UCC-1 filing form.

# Filing at the State Level

Immediately after selecting the jurisdiction you will be directed to the *Filing Type* screen. If e-filing is not available in the jurisdiction selected this screen will be skipped and you will be immediately placed into the UCC form.



Click the filing method that you would like to utilize for processing your filing. If you would like to find out if your filing meets e-filing requirements click on *Show e-Filing Rules*.



Consider electronic filing when available, as most states have discounted filing fees. In addition to cost savings, e-filings are often returned within hours. The major benefit to e-filing is that filings are not re-keyed, thus preventing indexing errors that lead to filings becoming serious misleading.

Why you should add a search to reflect to your due diligence process

There is a significant body of case law available that shows the search logic utilized from state to state can vary dramatically. So the question every filer should be asking is will my filing be located when using the states search logic?

Consider that things as minor as spacing or punctuation have rendered filings ineffective. Can your filing be located using the states standard search logic? Are you sure?

# The UCC-1 Data Entry Screen

**UCC FINANCING STATEMENT**  
 SEND ACKNOWLEDGEMENT TO: (Name and Address)

1a. DEBTOR'S EXACT FULL LEGAL NAME - Insert only one debtor name (1a or 1b) - do not abbreviate or combine names

1a. ORGANIZATION'S NAME

2a. ORGANIZATION'S NAME

2b. INDIVIDUAL'S LAST NAME FIRST NAME MIDDLE NAME SUFFIX

2c. MAILING ADDRESS CITY STATE POSTAL CODE COUNTRY

2d. TAX ID# SSN or EIN FEDERAL OR ORGANIZATION DEBTOR TYPE OF ORGANIZATION 2e. JURISDICTION of ORG. 2f. ORGANIZATION ID#, if any

3. SECURED PARTY'S NAME - (or NAME of TOTAL ASSIGNEE of ASSIGNOR 5/P) - Insert only one secured party name (3a or 3b)

3a. ORGANIZATION'S NAME

3b. INDIVIDUAL'S LAST NAME FIRST NAME MIDDLE NAME SUFFIX

3c. MAILING ADDRESS CITY STATE POSTAL CODE COUNTRY

4. This FINANCING STATEMENT covers the following collateral: (14 lines maximum)

File Name	File Type	Upload Attachment

5. ALTERNATIVE DESIGNATION (if applicable):  
 LESSOR/LESSOR  CONSIGNEE/CONSIGNOR  BAILEE/BAILEE  
 SELLER/BUYER  AS- LIEN  NON-UCC FILING

6.  This FINANCING STATEMENT is to be filed (or record) (or recorded) in the REAL ESTATE RECORDS. Attach Addendum (if applicable)

7. Check to REQUEST SEARCH REPORT(S) on Debtor(s) (ADDITIONAL FEE)(optional)  
 Debtor  Debtor 1  Debtor 2

8. OPTIONAL FILE REFERENCE DATA

FILED OFFICE COPY - UCC FINANCING STATEMENT (FORM UCC1) (REV. 01/02/02)

At Any Time You Can Clear a Section of the Form by Clicking *Clear Fields*

To Add a Debtor or Secured Party Without Re-Typing the Information Click Here to Access the Address Book (See Page #5 Collateral Book Instructions)

To Add Debtors While Completing the Form, Press the *Add to Address Book*.

File Name and File Type attached to the filing is displayed here

Information About the *Collateral Wizard* Will be Discussed on the Next Page.

Click Here to Access the File Upload Feature. Please Note that When e-Filing Some Jurisdictions Only Allow an Attachment OR a Collateral Description..

To Add Collateral Description Without Re-Typing the Information Click Here to Access the *Collateral Book* (See Page 4)

As Most Jurisdictions Will No Longer Provide Searches Based On this Area of the Form These Boxes Have Been Disabled.

## Inserting a Name into a Filing

Complete the UCC-1 as you would normally complete any paper document. If you setup your preferences as outlined at the beginning of this guide you can now use the *Address Book* to drop in debtor and secured party names.

Dropping in information from your *Address Book* is easy:

- Press *Show Address Book* button
- Locate the name of the debtor or secured party you would like to place into the filing
- Click on the debtor or secured party name
- Press the *Insert* button
- The debtor name or secured party name will be inserted into the filing and the *Address Book* will automatically close.

## Inserting a Collateral Description

The *Collateral Book* works the same as the *Address Book* with the exception that only collateral descriptions are maintained in the *Collateral Book*. To add a collateral description:

- Click the *Show Collateral Book* button to open the *Collateral Book*
- Locate the collateral description that you would like inserted into the filing
- Click on the collateral description you have selected
- Press the *Insert* button
- The *Collateral Book* screen will close automatically once select is pressed

### Exclusive Feature

The *Collateral Wizard* allows a filer to control how a description appears on the form. This feature is used to prevent sentences from being continued on separate pages, words or serial numbers from being separated and more. This is a feature you will not find on any other UCC Filing System!

## Saving a Name in the Address Book

Saving a name is accomplished in much the same way as inserting information into your filing.

- Type the debtor name or secured party name into the filing form
- Press the button *Add to Address Book*
- You will receive a notice that advises that the name was saved into the address book
- Press *OK*

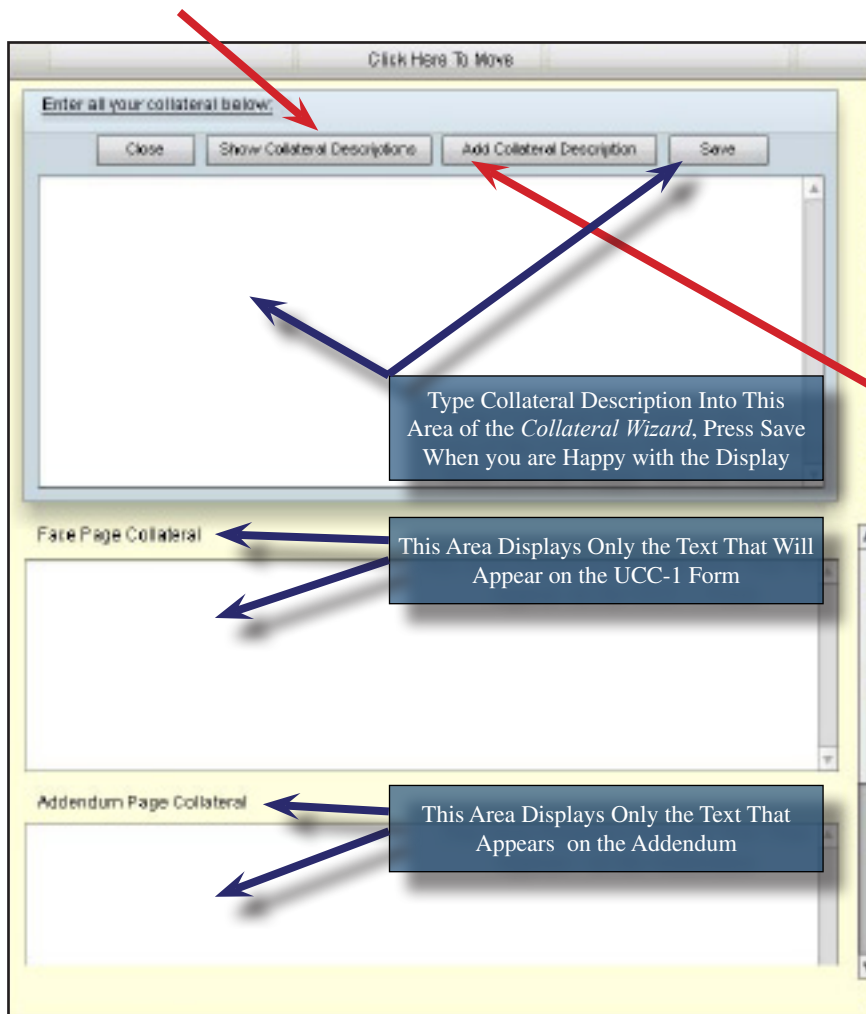
# The Collateral Wizard

The *Collateral Wizard* allows users to have complete control over how their text is displayed on the UCC-1 and UCC-3 National Forms. For the first time a filer can prevent sentences being parsed between pages, text or numbers from being divided when they should remain a single entry, or anywhere you desire to keep your text easier to read on the UCC form.

**PLEASE NOTE:** Collateral formatting does not apply when e-file is selected.

The *Collateral Wizard* opens automatically when you click in the collateral box. Once inside the collateral wizard you can either type or use the *Show Collateral Descriptions* to insert your text. You can then manipulate the text for formatting.

If formatting is not required you can insert a collateral description without accessing the *Collateral Wizard*. This feature not only saves time, but clicks!



## Saving a Collateral Description while Typing a Filing

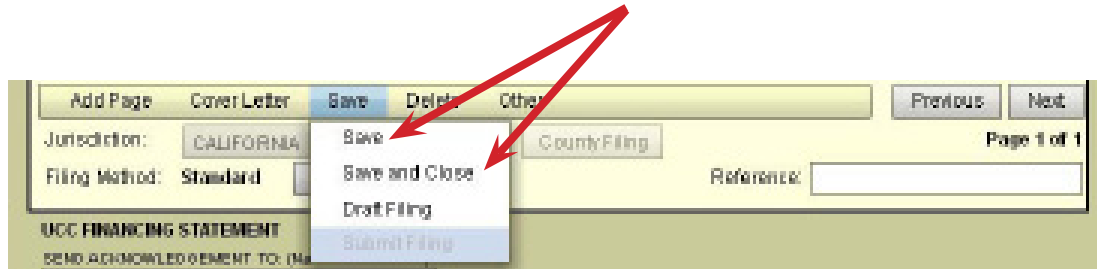
Collateral Descriptions can be saved into the *Collateral Book* while entering the description into the collateral box. Once you have completed entering the description click *Add Collateral Description*, assign the description name and then press *Save*.

If you would like to adjust how the text is being parsed between the forms, make adjustments to your collateral text in the blue area of the screen where collateral is typed. This will adjust the display accordingly. Press *Save* to

insert the collateral description into the filing and *Close* the *Collateral Wizard*. At any time you can click on *Close* if you wish to exit the *Collateral Wizard* without saving your information.

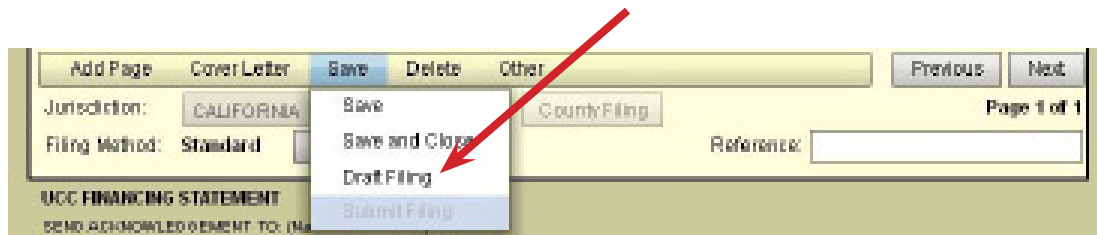
# Saving a Filing

Once a filing has been started in the system you can save the filing at anytime to come back to complete it. To save the filing click on *Save* to access the various save options. Clicking on *Save* will save a copy of the filing in your history so that you may come back later to complete the filing, make edits, send a draft or submit the filing. If you have completed working with this filing you can choose the *Save and Close* option to save and close the filing to begin your next filing. **PLEASE NOTE:** Choosing these options means that you do not wish to receive an e-mail copy.



# Drafting a Filing

Drafting the filing will save a copy of the filing and e-mail a copy of the filing to you. This allows you to e-mail the filing if necessary to your client, attorney or anyone else that may need to review and approve it before submittal. Once the filing has been saved as a Draft the system will return you to the UCC-1 jurisdiction screen to begin the next filing.



The system automatically validates your filing against jurisdictional requirements. If errors are discovered a list of issues are provided. These errors must be corrected before the filing can be saved as a draft. If you do not wish for your filings to be validated upon draft, you can disable this feature in the *My Information* tab.

Please contact us at 800.533.7272 if assistance is required.

## NOTE

The history tab of UCC eZFILE® manages *Drafted* and *Saved* filings as two different types of filings. *Saved* filings show with a status of *New*. Filings where *Drafted* was selected will show with the status of *Draft*. The status is differentiated to assist in identify those filings that were sent for review verse those created with no further action taken.

# Submitting a Filing

Selecting *Submit Filing* will result in the filing being validated. If errors are discovered you will be presented a list of corrections required before the filing can be submitted. The validation feature can be disabled in the *My Information* tab by unchecking the box *Validate My Filings Upon Submit*.

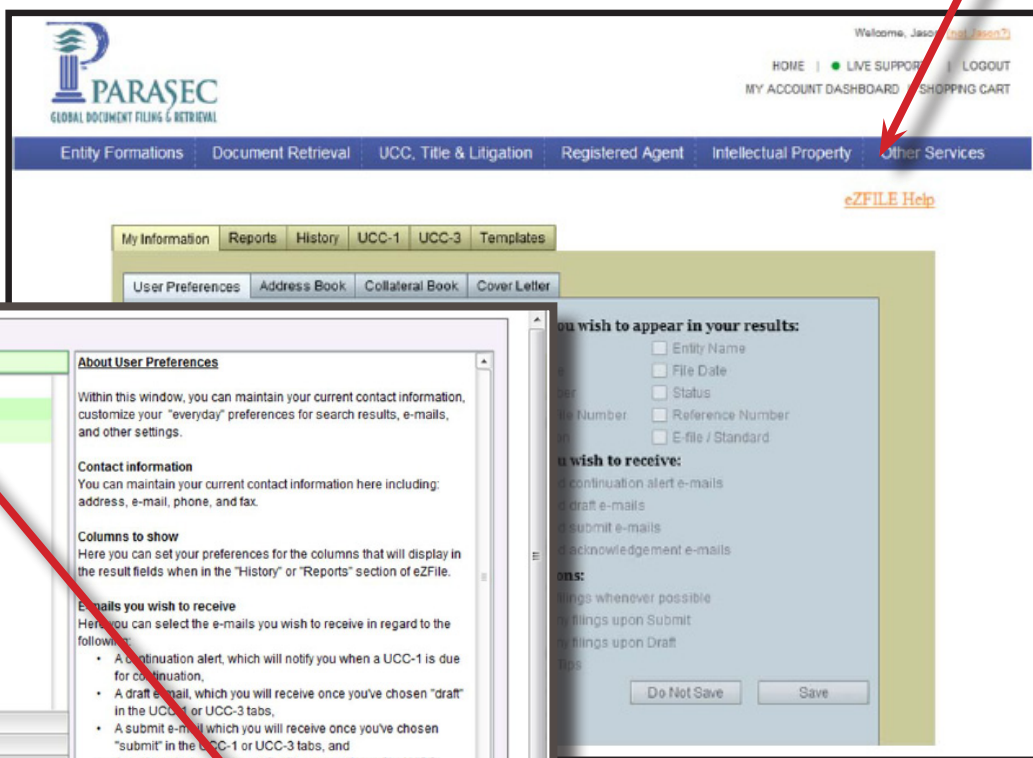
Once the filing is validated, it will be submitted for processing and saved to your history. A confirmation receipt will be e-mailed. After the filing is accepted into the system you will be returned to the UCC-1 jurisdiction screen to begin the next filing.



# Additional Resources for Help

## Online Help System

Just under the blue navigation bar on every UCC eZFILE® there is a link that reads [eZFILE Help](#).



Clicking on the eZFILE Help link will open the online help system.

The online help system is easily navigated by clicking on the menu options on the left side of the screen. When you click on a subject the

topic will open in an accordion fashion and display additional topics in file folders. Clicking on these file folders will open additional documents regarding the topic you are researching.

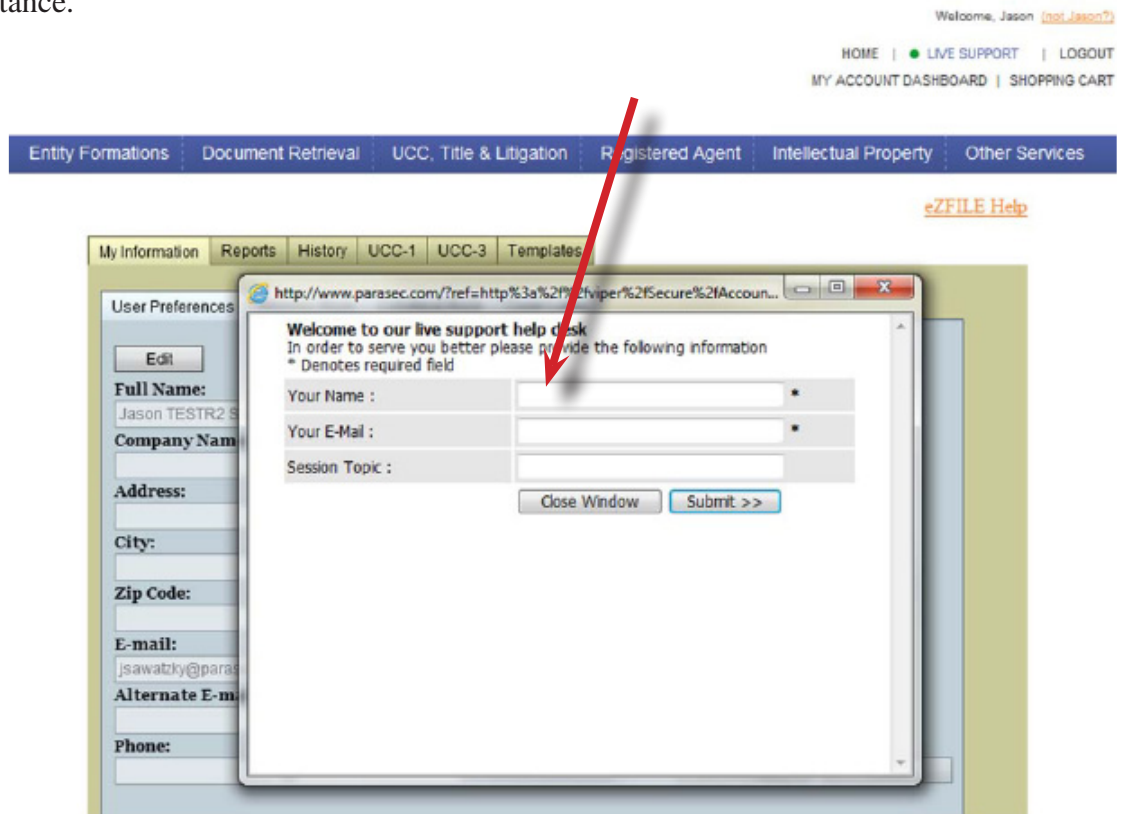
The HELP system opens in a “popup window” allowing you to keep the system open while navigating

through UCC eZFILE. If the help system does not open please ensure you do not have a popup blocker installed.

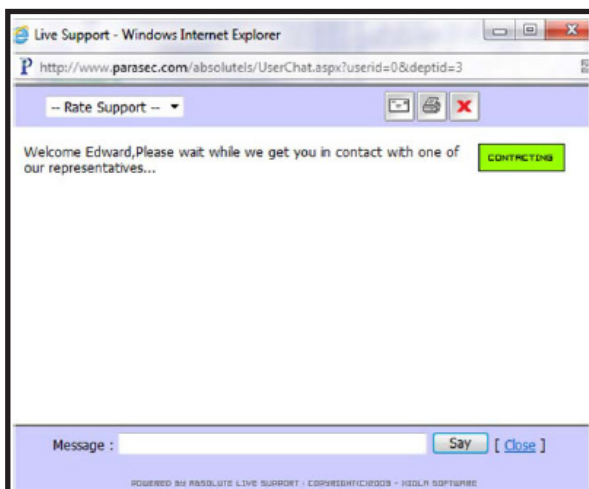
If a popup blocker is installed on your system often you can press and hold the control button (CTRL) while clicking on the link to allow the popup. A permanent solution should also be available by contacting your IT department for assistance on setting an exception for the www.parasec.com website.

## Live Chat

Online help is literally a click away when you select the link for LIVE SUPPORT. Receive assistance in real time during regular business hours from representatives trained in the area for which you are seeking assistance.



Click the LIVE SUPPORT link to open the help desk dialog box and type the required information. It is also recommended you complete the session topic box as it will assist the representative in the purpose of your chat and provide you the needed information quickly.



The system will advise you when you have been connected to the representative. The chat system works as any instant messenger program. At the conclusion of the chat session you will be provided with the following options:

- Send transcript by e-mail
- Print chat transcript
- Leave a message
- Close the chat window and exit

## Closing

With UCC eZFILE® you can eliminate redundant tasks and concentrate on more important activities. UCC eZFILE® has many additional features that are not covered in the eZStart Guide. If you would like more detailed instructions or additional features and benefits contact your Account Executive or attend a product training session to learn more about all of the time saving features.

**Online Does Not Mean Alone,  
Help is only a Phone Call Away.  
800.533.7272**