

## Copying a Contact within the Same Order

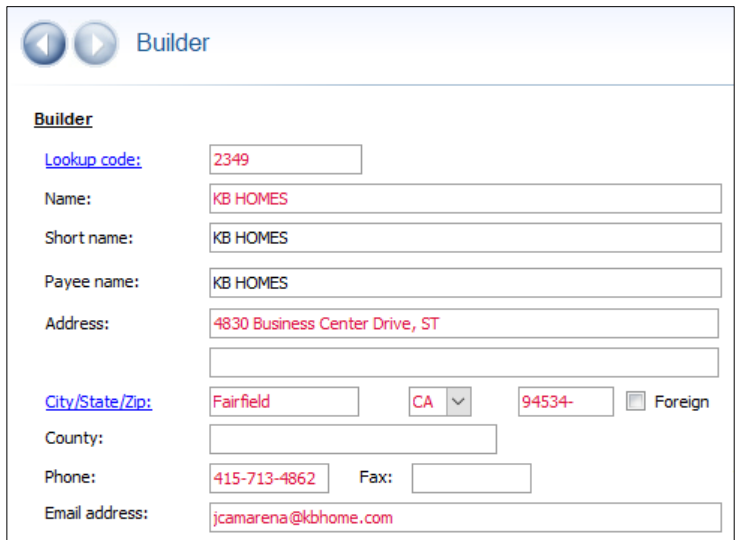
When an Order Contact is serving two roles within the same order, you can use the Copy feature to avoid having to enter the Contact information twice. For example, a Builder is also the Seller or the contact may have been entered as an Other Contact and you need to assign it a different role (i.e., Lender, Attorney, Buyer, Seller, etc.).

Follow these steps to copy the contact information from one Contact Type to another.

**Scenario One:** A Contact (Builder, Lender, Attorney, etc.) serving in two or more roles within the same order.

In our example, the Builder is also the Seller in the transaction.

1. Add the contact as you normally would
2. Return to the **Order Contacts** screen



**Builder**

Lookup code: 2349

Name: KB HOMES

Short name: KB HOMES

Payee name: KB HOMES

Address: 4830 Business Center Drive, ST

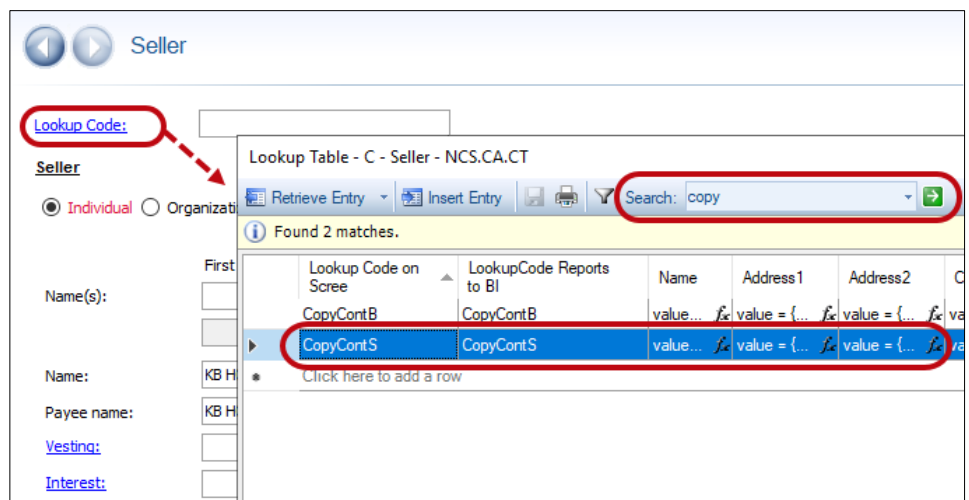
City/State/Zip: Fairfield CA 94534 ☐ Foreign

County:

Phone: 415-713-4862 Fax:

Email address: jcamarena@kbhome.com

3. Open the Contact type they should be added to next (using a placeholder or adding new)
4. Click the **Lookup Code** link
5. In the **Search** field, enter **copy**; press the **Enter** key
6. Double-click the corresponding entry for the current Contact Type
  - a. **CopyContB** = Buyer
  - b. **CopyContS** = Seller



**Seller**

Lookup Code:

Individual ☒ Organization ☐

Name(s):

Name: KB H

Payee name: KB H

Vesting:

Interest:

Lookup Table - C - Seller - NCS.CA.CT

Retrieve Entry Insert Entry Search: copy

Found 2 matches.

Lookup Code on Screen	LookupCode Reports to BI	Name	Address1	Address2	C
CopyContB	CopyContB	value...	value = {...	value = {...	value = {...
CopyContS	CopyContS	value...	value = {...	value = {...	value = {...

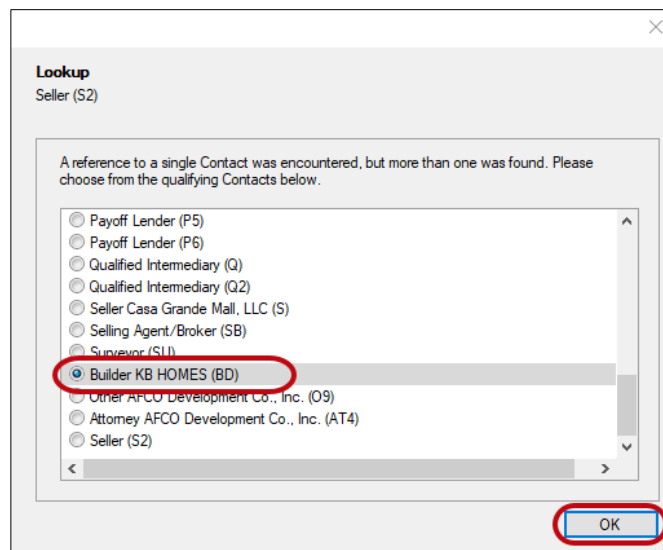
Click here to add a row

## Copying a Contact within the Same Order

The **Lookup** list is displayed for the current Contact type providing a list of all current contacts in the order and the Name if entered.

**NOTE:** The list is **not** in alphabetical order.

7. Check the radio button for the original Contact; in our example this is **Builder KB Homes (BD)**
8. Click **OK** to add the Contact information to the new Contact type



**Lookup**  
Seller (S2)

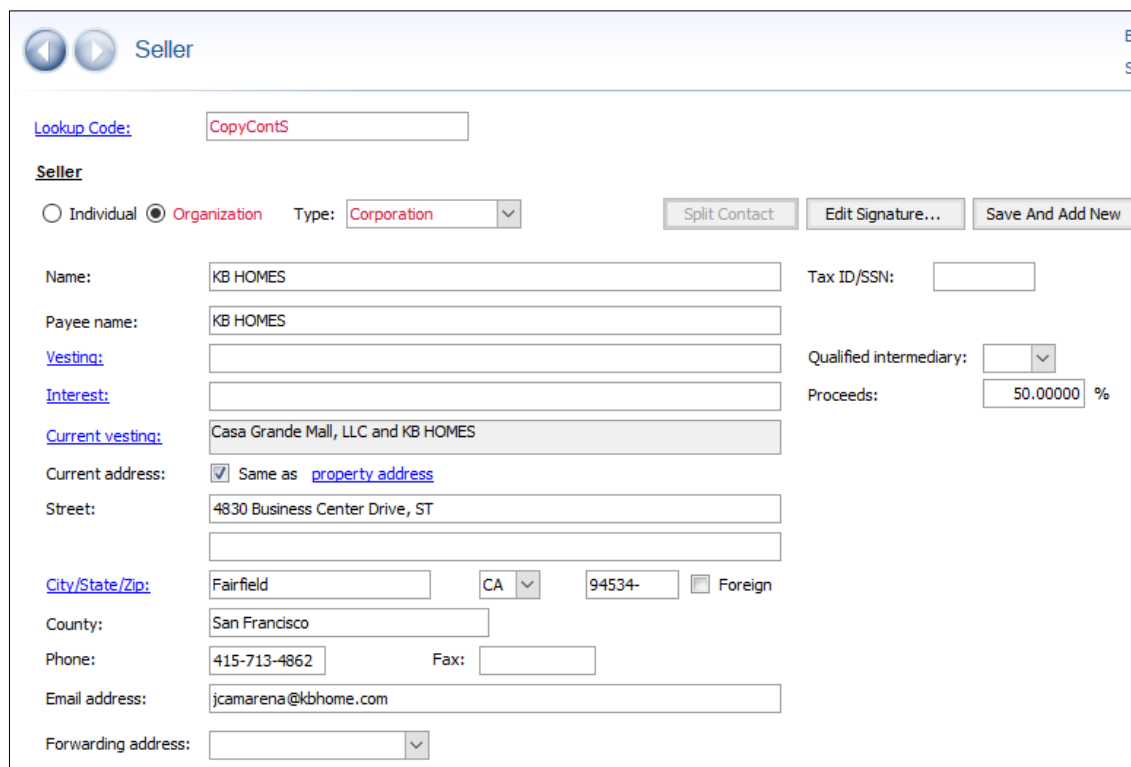
A reference to a single Contact was encountered, but more than one was found. Please choose from the qualifying Contacts below.

- ☐ Payoff Lender (P5)
- ☐ Payoff Lender (P6)
- ☐ Qualified Intermediary (Q)
- ☐ Qualified Intermediary (Q2)
- ☐ Seller Casa Grande Mall, LLC (S)
- ☐ Selling Agent/Broker (SB)
- ☐ Supervisor (SI)
- ☒ **Builder KB HOMES (BD)**
- ☐ Other AFCO Development Co., Inc. (O9)
- ☐ Attorney AFCO Development Co., Inc. (AT4)
- ☐ Seller (S2)

**OK**

The **BD-Builder** Contact information is now populated on the **S2-Seller** Contact screen.

9. Enter additional information as needed for the newly added Contact



**Seller**

Lookup Code: CopyContS

**Seller**

☐ Individual ☒ **Organization** Type: Corporation

Split Contact Edit Signature... Save And Add New

Name: KB HOMES Tax ID/SSN:

Payee name: KB HOMES

Vesting: Qualified intermediary: %

Interest: Proceeds: 50.00000 %

Current vesting: Casa Grande Mall, LLC and KB HOMES

Current address: ☒ Same as property address

Street: 4830 Business Center Drive, ST

City/State/Zip: Fairfield CA 94534 Foreign

County: San Francisco

Phone: 415-713-4862 Fax:

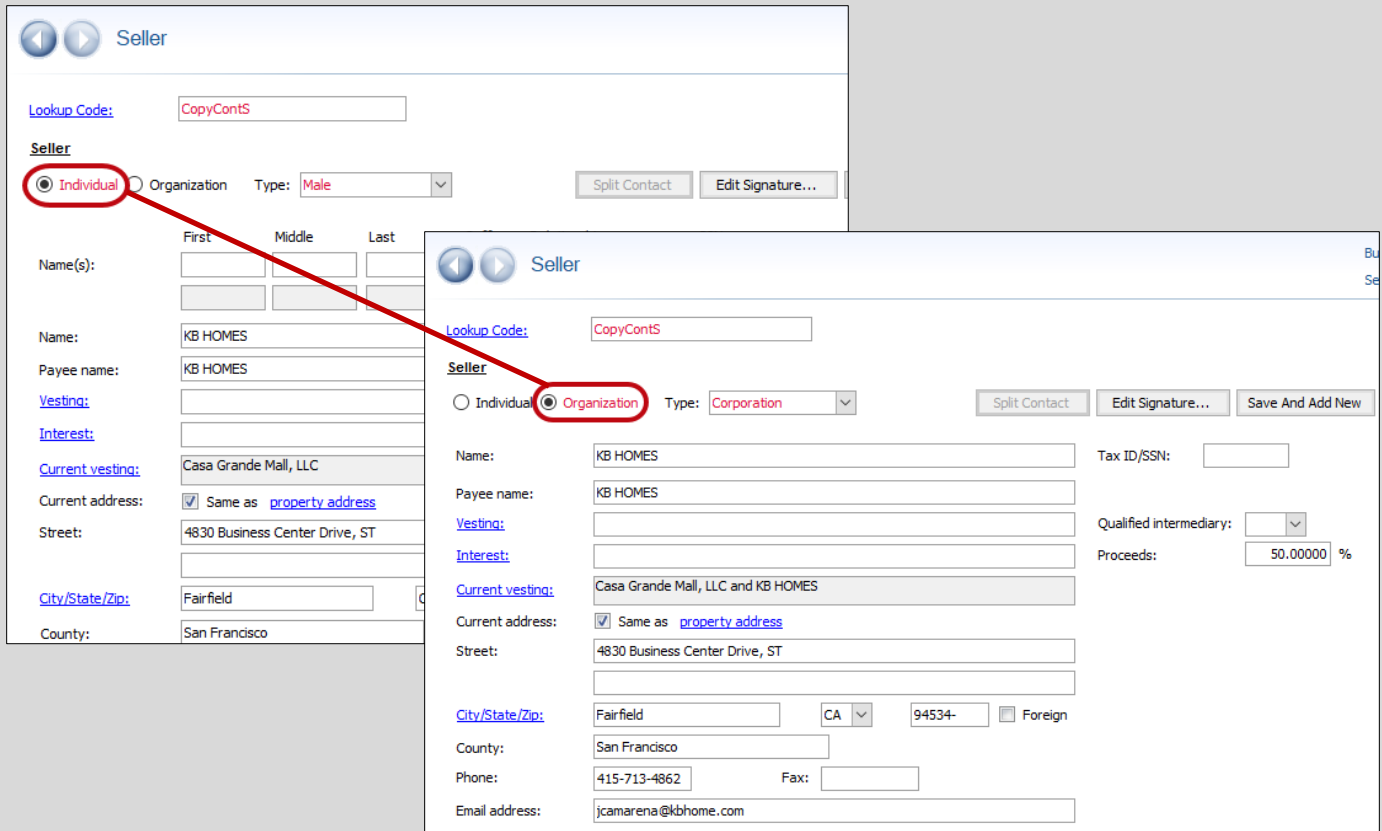
Email address: jcamarena@kbhome.com

Forwarding address:

If the original Contact should be added as another Contact type, **steps 3-8** can be repeated as needed.

## Copying a Contact within the Same Order

**REMEMBER:** The **Seller** Contact opens as an **Individual** by default. If you forget to select **Organization** prior to performing the **Copy** function, you can select the **Organization** radio button after copying. The correct fields are then populated with the incoming information.

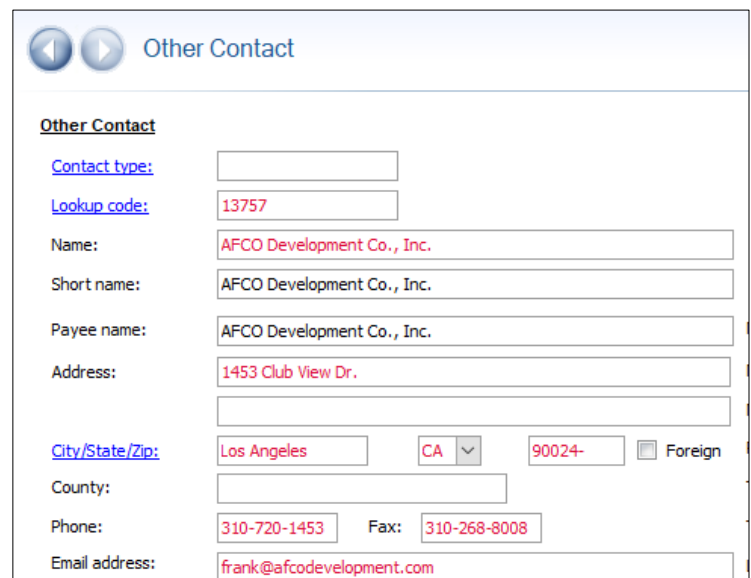


The screenshot shows two overlapping windows of the 'Seller' contact form. The background window has the 'Individual' radio button selected. The foreground window has the 'Organization' radio button selected, which is circled in red. A red arrow points from the 'Individual' button in the background window to the 'Organization' button in the foreground window. The 'Lookup Code' field in both windows contains 'CopyContS'. The foreground window shows additional fields like 'Tax ID/SSN', 'Qualified intermediary', and 'Proceeds'.

**Scenario Two:** A Contact entered originally as an **Other** Contact type and you need to assign them to a different Contact type.

In our example, an **Other Contact** is also the **Attorney** in the transaction.

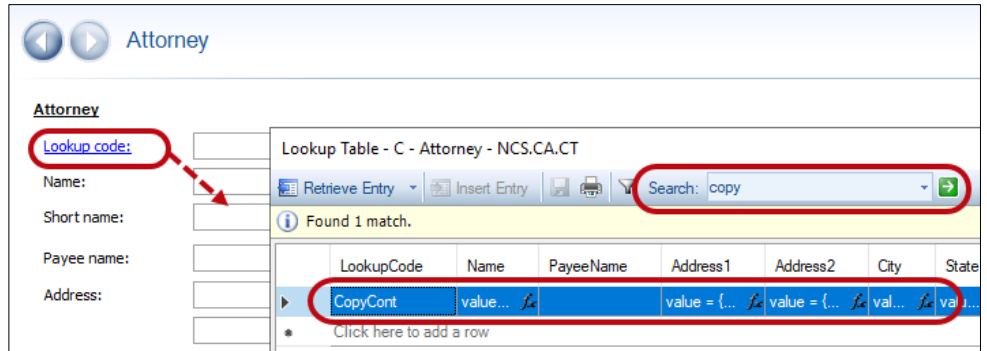
1. Click the **Lookup code** link to add the **Other Contact**
2. Return to the **Order Contacts** screen



The screenshot shows the 'Other Contact' form. The 'Contact type' field is empty. The 'Lookup code' field contains '13757'. The 'Name' field contains 'AFCO Development Co., Inc.'. The 'Short name' field contains 'AFCO Development Co., Inc.'. The 'Payee name' field contains 'AFCO Development Co., Inc.'. The 'Address' field contains '1453 Club View Dr.'. The 'City/State/Zip' field contains 'Los Angeles', 'CA', and '90024-'. The 'County' field is empty. The 'Phone' field contains '310-720-1453' and the 'Fax' field contains '310-268-8008'. The 'Email address' field contains 'frank@afcodevelopment.com'.

## Copying a Contact within the Same Order

3. Open the Contact type they should be added to next (using a placeholder or adding new)
4. Click the **Lookup Code** link
5. In the **Search** field, enter **copy**; press the **Enter** key
6. Double-click the **CopyCont** entry



Attorney

Lookup Table - C - Attorney - NCS.CA.CT

Retrieve Entry Insert Entry Search: copy

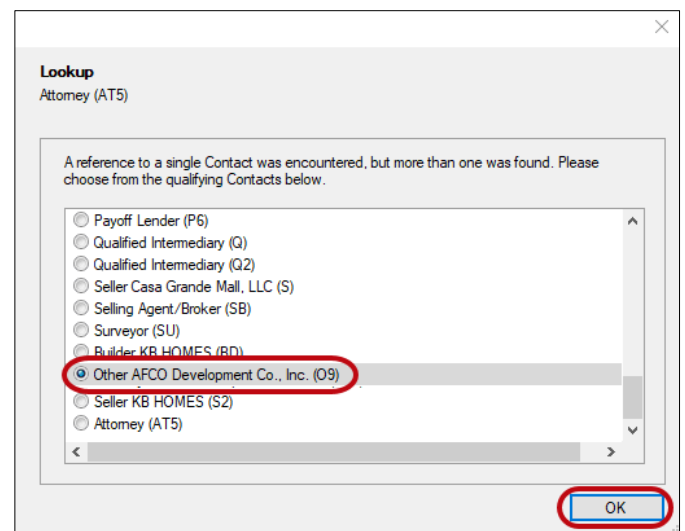
Found 1 match.

LookupCode	Name	PayeeName	Address1	Address2	City	State
CopyCont	value...		value = {...	value = {...	val...	va...

Click here to add a row

From the **Lookup** list displayed,

7. Locate the **Other** contact you wish you to copy
8. Check the corresponding radio button; click **OK**



Lookup

Attorney (AT5)

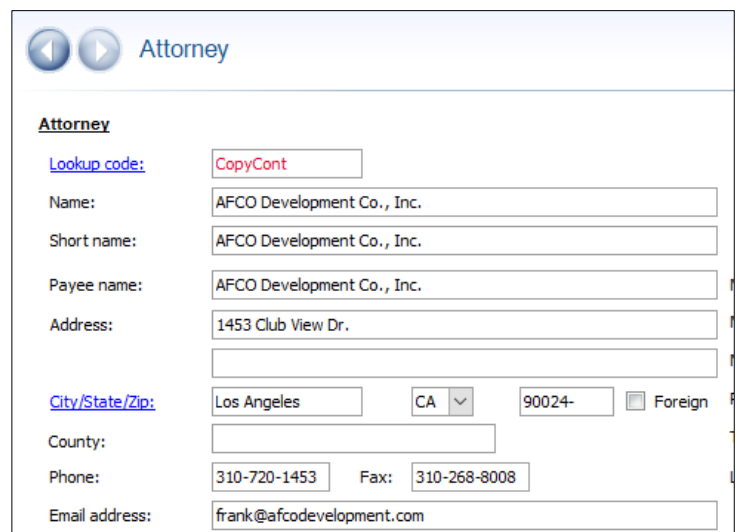
A reference to a single Contact was encountered, but more than one was found. Please choose from the qualifying Contacts below.

- ☐ Payoff Lender (P6)
- ☐ Qualified Intermediary (Q)
- ☐ Qualified Intermediary (Q2)
- ☐ Seller Casa Grande Mall, LLC (S)
- ☐ Selling Agent/Broker (SB)
- ☐ Surveyor (SU)
- ☐ Builder KB HOMES (BD)
- ☒ Other AFco Development Co., Inc. (O9)
- ☐ Seller KB HOMES (S2)
- ☐ Attorney (AT5)

OK

The information is now populated to the new Contact.

9. Add any additional contact information as needed



Attorney

Lookup code: CopyCont

Name: AFco Development Co., Inc.

Short name: AFco Development Co., Inc.

Payee name: AFco Development Co., Inc.

Address: 1453 Club View Dr.

City/State/Zip: Los Angeles CA 90024 Foreign

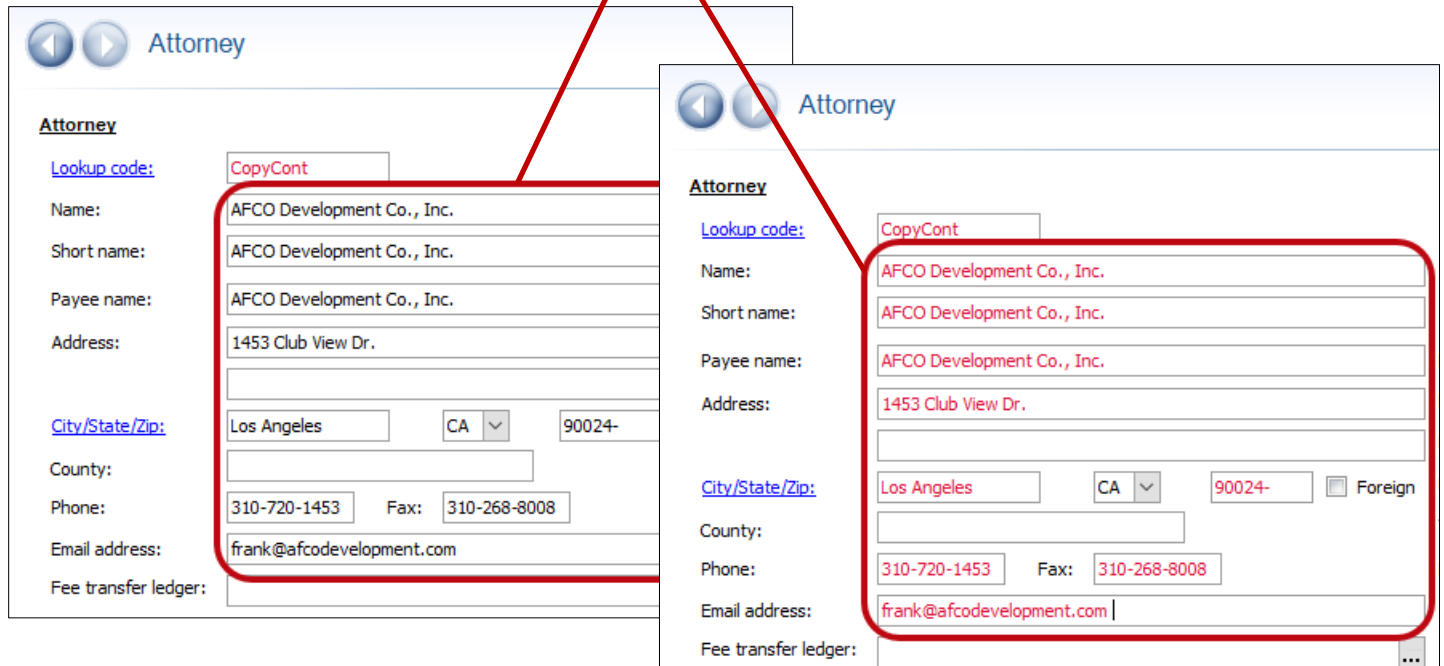
County:

Phone: 310-720-1453 Fax: 310-268-8008

Email address: frank@afcodevelopment.com

## Copying a Contact within the Same Order

**IMPORTANT:** You can lock the newly entered information by entering a space after each field entry with **black** text; this avoids the contact information being changed if the original contact is changed in the Lookup Table.



**Attorney**

Lookup code: CopyCont

Name: AFCO Development Co., Inc.

Short name: AFCO Development Co., Inc.

Payee name: AFCO Development Co., Inc.

Address: 1453 Club View Dr.

City/State/Zip: Los Angeles CA 90024-

County:

Phone: 310-720-1453 Fax: 310-268-8008

Email address: frank@afcodevelopment.com

Fee transfer ledger:

**Attorney**

Lookup code: CopyCont

Name: AFCO Development Co., Inc.

Short name: AFCO Development Co., Inc.

Payee name: AFCO Development Co., Inc.

Address: 1453 Club View Dr.

City/State/Zip: Los Angeles CA 90024- Foreign

County:

Phone: 310-720-1453 Fax: 310-268-8008

Email address: frank@afcodevelopment.com

Fee transfer ledger:

**ADMIN Users:** If you are responsible for adding contacts to the Lookup Tables, the Lookup table codes need to be added twice for Buyers and Sellers (in the **Lookup Code on Screen** to the **LookupCode Reports to BI** fields) until such time as this process is automated.

Lookup Table - C - Seller - NCS.CA.CT		
<a href="#">Retrieve Entry</a>	<a href="#">Insert Entry</a>	<a href="#">Search:</a>
Lookup Code on Scree	LookupCode Reports to BI	Name
1212M	1212M	1212 Ma...
ARIW21031	ARIW21031	ARI Univ...
BRWL10250	BRWL10250	Beverly ...