
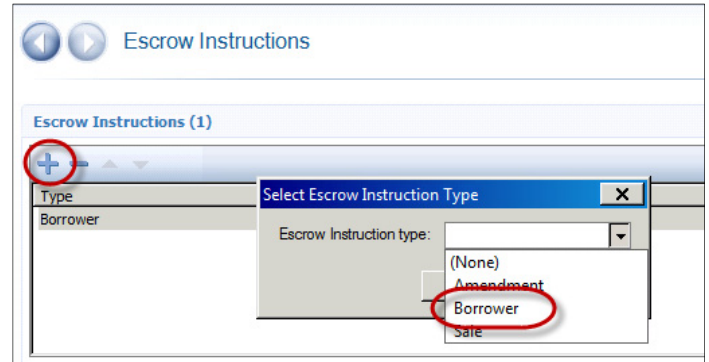


Follow these steps to prepare an Escrow Instructions document.

Adding the Escrow Instructions Document

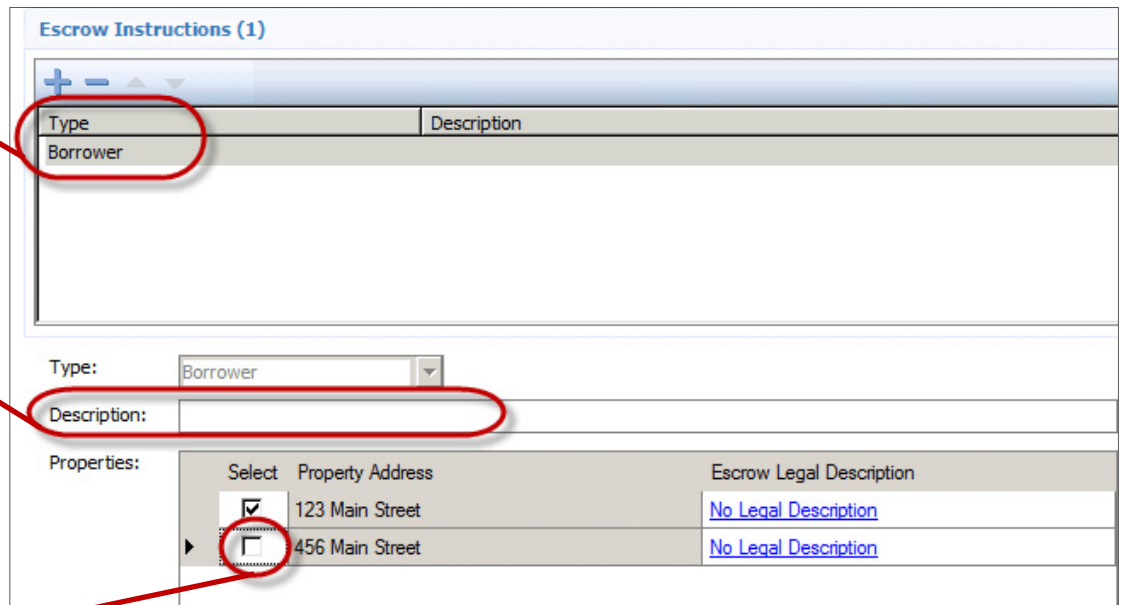
1. Navigate to **Document Preparation > Escrow Instructions** screen
2. Click the **Add Escrow Instructions**  icon
3. In the **Escrow Instruction Type** drop-down, select the document; click the **OK** button



The selected Escrow Instructions document appears in the grid.


In the **Description** field, you can enter document versions. What you enter here appears next to the document name.

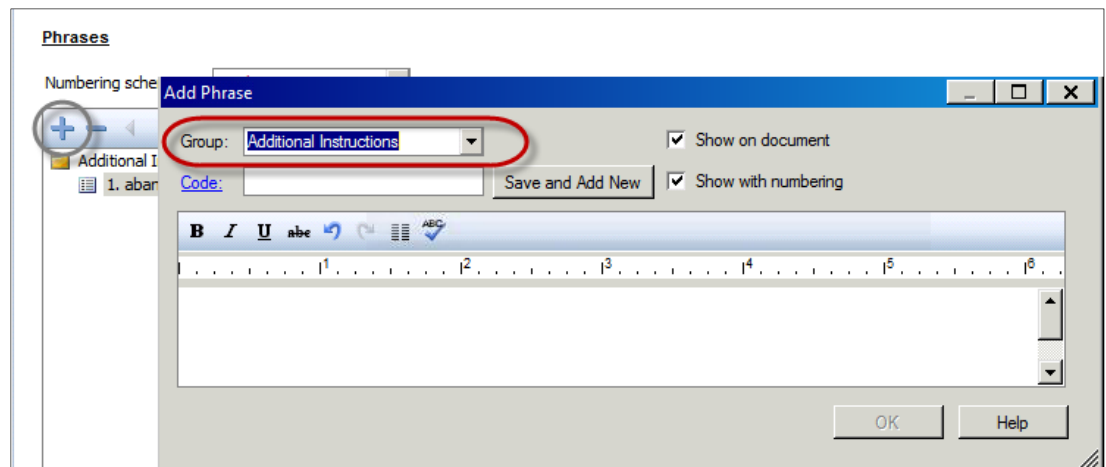
If there are multiple properties, they all appear in your document by default. You can exclude properties by unchecking the appropriate check box.



The screenshot shows the 'Escrow Instructions (1)' grid with a red circle around the 'Borrower' entry. Below the grid, the 'Type' dropdown is set to 'Borrower'. The 'Description' field is empty. The 'Properties' section shows a table with two rows: '123 Main Street' (checked) and '456 Main Street' (unchecked). A red circle highlights the unchecked checkbox for '456 Main Street'. The 'Escrow Legal Description' column shows 'No Legal Description' for both properties.

Adding Phrase(s)

4. Click the **Add Phrase**  icon
5. In the **Group** drop-down, select the appropriate group based on the document you are building



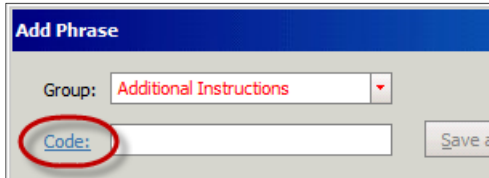
The screenshot shows the 'Phrases' window. A red circle highlights the '+' icon in the toolbar. Another red circle highlights the 'Additional Instructions' option in the 'Group' dropdown of the 'Add Phrase' dialog box. The dialog box also shows 'Show on document' and 'Show with numbering' checked, and a 'Save and Add New' button.

6. Add phrases by selecting from the lookup table or entering the code

Select from the lookup table

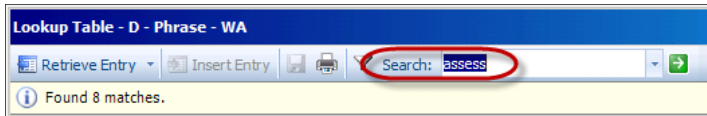
When you are not sure of a phrase's code, you can select it from a list.

- a) Click the **Code** link

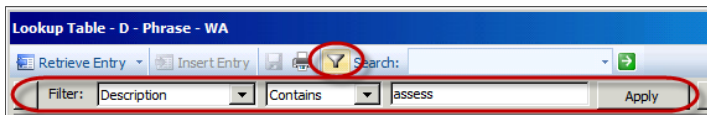


- b) Locate the code

- › You can search the text of the codes by entering characters into the **Search** field, then press the **Enter** key



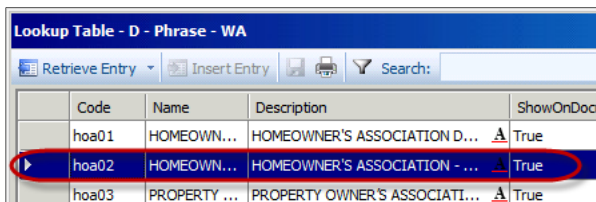
- › You can click the **Show Filter**  icon to use the filters to narrow the list



- › You can click a column heading to sort the column

Code	Name	Description
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- c) Double-click the row to select the code

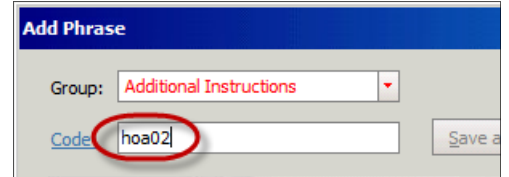


Code	Name	Description	ShowOnDocu
hoa01	HOMEOWN...	HOMEOWNER'S ASSOCIATION D...	True
hoa02	HOMEOWN...	HOMEOWNER'S ASSOCIATION - ...	True
hoa03	PROPERTY ...	PROPERTY OWNER'S ASSOCIATI...	True

Enter the code

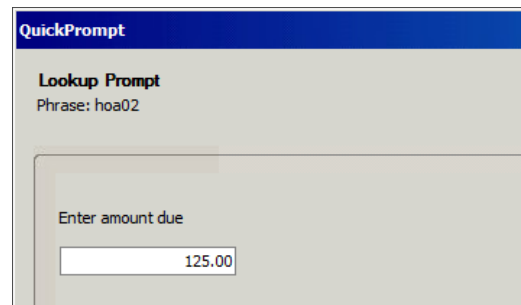
When you know a phrase's code, you can enter it without looking through a list.

- a) In the **Code** field, enter the code



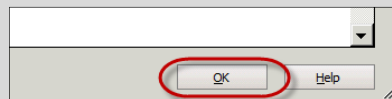
- b) Press the **Tab** key

7. Complete all prompts associated with the code



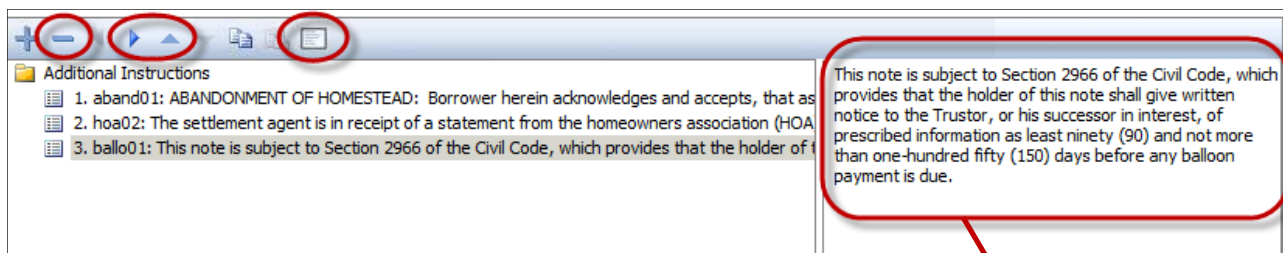
8. Click the **Save and Add New** button
9. Repeat **Steps 4-8** until all the phrases are added





NOTE: after adding the last phrase, instead of clicking the **Save and Add New** button, click the **OK** button to return to the **Escrow Instructions** screen.



Working with Phrases

From the grid on the **Escrow Instructions** screen, you can review, edit, reposition, or delete a phrase.



- › To edit the phrase, double-click it
- › To review the entire phrase, click the **Preview Pane**  icon to open the preview window
- › To move a phrase higher in the list, highlight it, then click the **Move Up**  icon
- › To move a phrase lower in the list, highlight it, then click the **Move Down**  icon
- › To delete a phrase, highlight it, then click the **Delete Phrase**  icon

Completing More/Less Fields

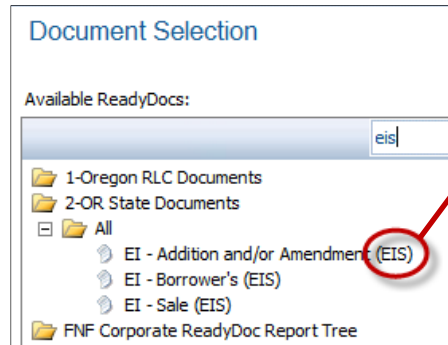
10. If applicable, expand the appropriate more/less bar(s) at the bottom of the screen, and complete the fields

NOTE: The fields under these more/less bars minimize the number of document prompts. If you don't complete them here, they are available by hotspot while previewing the document.

Custom Fields
Borrower
Sale

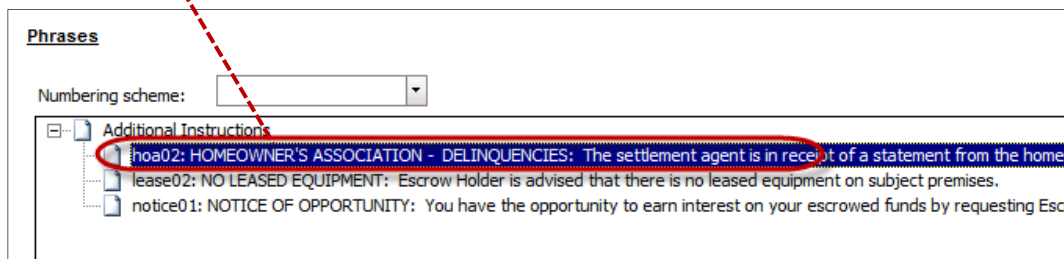
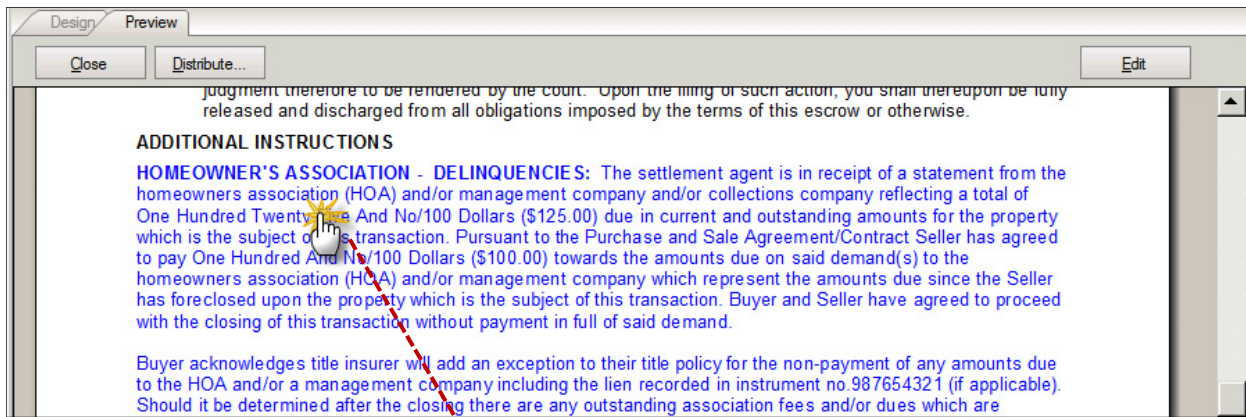
Distributing the Document(s)

11. From the **Order** ribbon, click the **Documents** button
12. Preview the appropriate Escrow Instructions document(s)



(EIS) designates documents that pull from the **Escrow Instructions** screen.

While previewing the document, you can hotspot to the specific phrase on the Escrow Instructions screen to make any changes.



13. Distribute the document as normal