
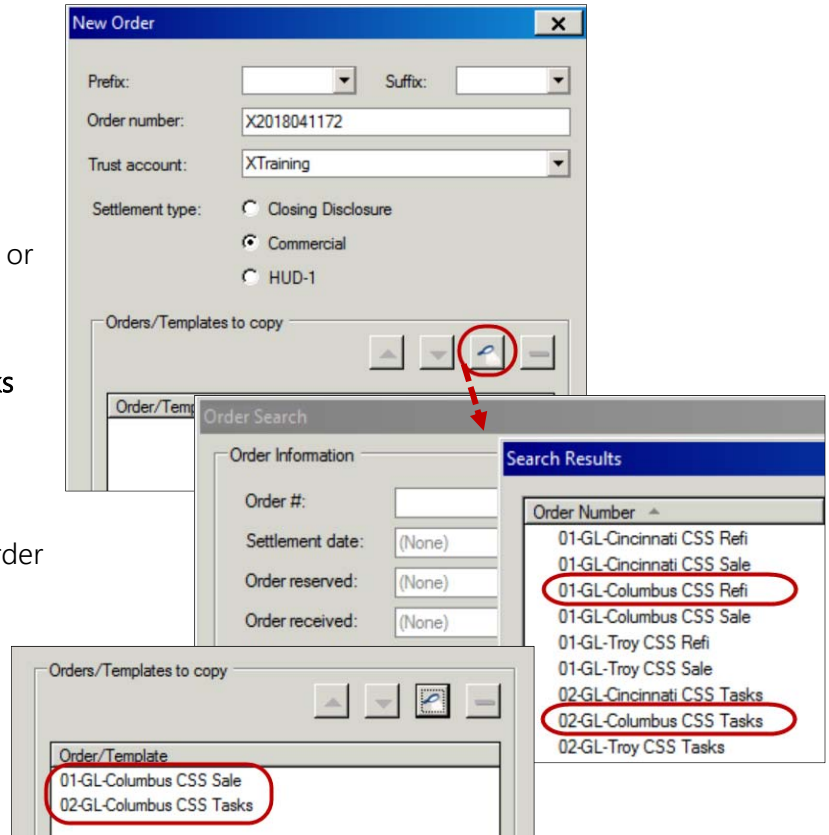


Processing an Escrow Only Order

Follow these steps to open an Escrow Only order, enter fees and submit your Payment Transmittal form to the outside Title Company.

Creating the Order

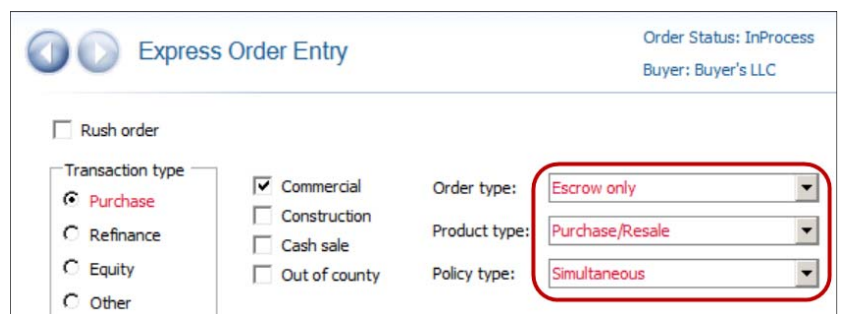
1. Create a new order
2. Apply templates
 - a) Click the **Search**  icon; press the **Enter** key
 - b) Highlight the appropriate template
 - 01-GL-[*applicable city*] CSS [Refi or Sale]
 - c) Holding the **Ctrl** key, highlight the,
 - 02-GL-[*applicable city*] CSS Tasks template
 - d) Click the **OK** button
 - e) Click the **OK** button to generate the order



Entering Order Details

On the **Order Entry** screen,

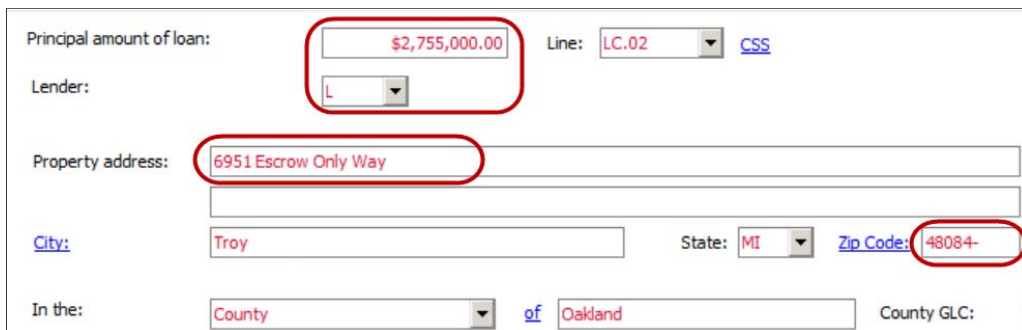
3. From the **Order type** drop-down, select **Escrow only**
4. Verify the **Product type** and **Policy type**; change if needed



5. Select the **Escrow Officer/Closer** and **Pre-closer/Escrow assistant**
6. Enter the **Sales price** (if applicable)

Processing an Escrow Only Order

7. In the **Principal amount of loan** field, enter the loan amount (if applicable)
8. Select the corresponding **Lender** (if applicable)
9. Enter the **Property address**; entering the **Zip Code** populates the **City**, **State** and **County** fields



Principal amount of loan: Line: [CSS](#)

Lender:

Property address:

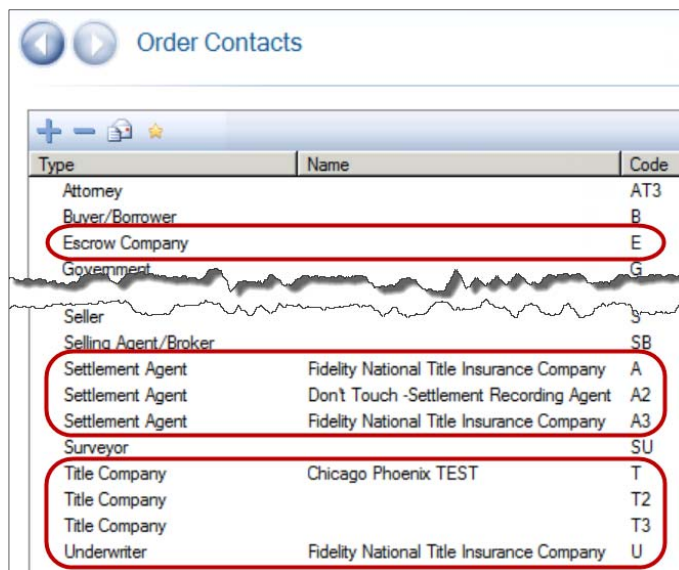
City: State: Zip Code:

In the: of County GLC:

NOTE: If entering multiple loans and/or properties, reach out to your Power User or SoftPro Support Staff with questions.

Entering Contacts

10. Navigate to the **Order Contacts** screen
11. Enter the,
 - › **E**-Escrow Company = blank
 - › **A**-Settlement Agent = your local office
 - › **A2**-Settlement Agent = defaults to the **Settlement Recording Agent**
 - › **A3**-Settlement Agent = your local office (if needed)
 - › **T**-Title Company = select the NCS outside Title Company; this is **not** a revenue Contact
 - i. Verify the **Include on revenue reports** check box is unchecked



Type	Name	Code
Attorney		AT3
Buyer/Borrower		B
Escrow Company		E
Government		G
Seller		S
Selling Agent/Broker		SB
Settlement Agent	Fidelity National Title Insurance Company	A
Settlement Agent	Don't Touch -Settlement Recording Agent	A2
Settlement Agent	Fidelity National Title Insurance Company	A3
Surveyor		SU
Title Company	Chicago Phoenix TEST	T
Title Company		T2
Title Company		T3
Underwriter	Fidelity National Title Insurance Company	U



Order Status: InProcess
Buyer: Buyer's LLC
Transaction Type:

Title Company

Lookup code:

Name:

☐ Include on revenue reports
☐ Marketing source

- › **T2**-Title Company = can be used for additional Title Companies on a multi-state transaction
- › **T3**-Title Company = can be used for additional Title Companies on a multi-state transaction

NOTE: The additional **T**-Contact(s) is/are required for the additional Title Company contact(s) when a multi-state transaction.

Processing an Escrow Only Order

› U-Underwriter, leave as default entry


12. Enter all remaining Contacts using placeholders first; when entering the Contact that gave you the order, check the **Marketing source** check box

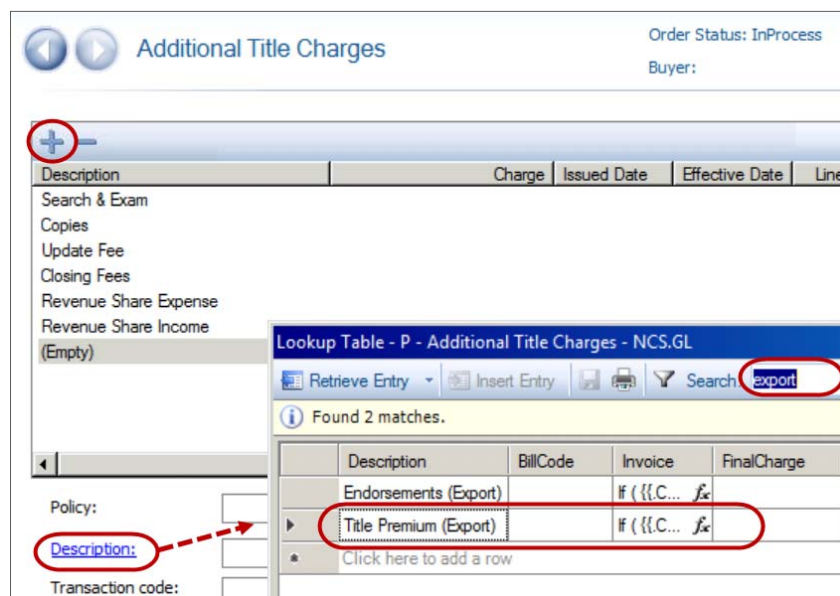
☐ Include on revenue reports
☒ Marketing source

Entering Charges

13. Navigate to the **Additional Title Charges** screen

14. Enter Title Premiums

- › Click the **Add Title Charges**  icon
- › Click the **Description** link; search for **Export**; double-click the **Title Premium (Export)** entry



Order Status: InProcess
Buyer:

Description	Charge	Issued Date	Effective Date	Line
Search & Exam				
Copies				
Update Fee				
Closing Fees				
Revenue Share Expense				
Revenue Share Income				
(Empty)				

Policy:
 Description:
 Transaction code:

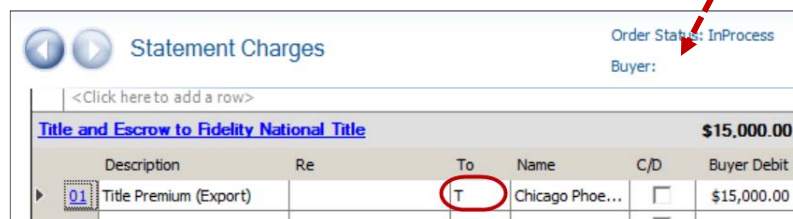
Lookup Table - P - Additional Title Charges - NCS.GL
 Retrieve Entry Insert Entry Search **Export**
 Found 2 matches.

Description	BillCode	Invoice	FinalCharge
Endorsements (Export)		If ({{C...}}	\$x
Title Premium (Export)		If ({{C...}}	\$x
Click here to add a row			

- › In the **Charge** field enter the total premium
- › Verify the fee is assigned to a **Line** and **Invoice**
- › Click the **CSS** link to navigate to the **Line** assigned on the **Statement Charges** screen
- › Verify the **To** code = T

Multiplication %: %
 Adjustment: +/-
 Charge: Taxable ☐

☐ Calculate charge per \$
 Seller pay: %
 Line: **CSS**
 Invoice:
 Bill code:




Order Status: InProcess
Buyer:

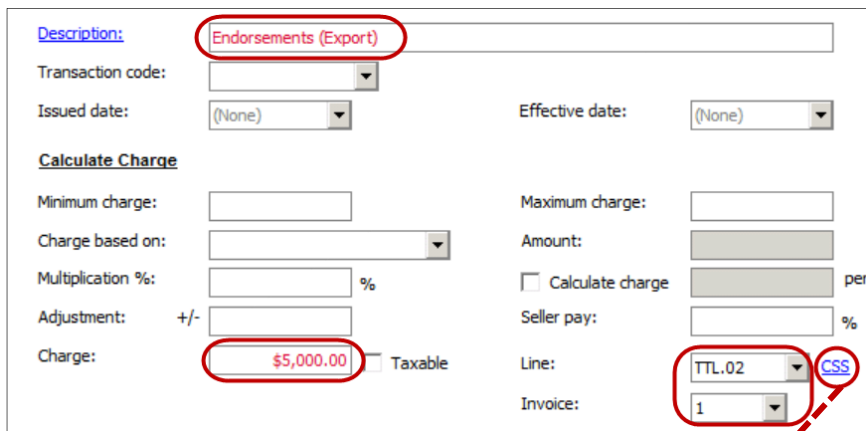
<Click here to add a row>

Description	Re	To	Name	C/D	Buyer Debit
01 Title Premium (Export)		T	Chicago Phoe...		\$15,000.00

Processing an Escrow Only Order

15. Enter Endorsements

- › Click the **Add Title Charges**  icon
- › Click the **Description** link; search for **Export**; double-click the **Endorsements (Export)** entry
- › In the **Charge** field enter the total endorsements amount
- › Verify the fee is assigned to a **Line** and **Invoice**
- › Click the **CSS** link to navigate to the **Line** assigned on the **Statement Charges** screen
- › Verify the **To** code = **T**



Title and Escrow to Fidelity National Title						
Description	Re	To	Name	C/D	Buyer Debit	
01 Title Premium (Export)		T	Chicago Phoe...		\$15,000.00	
02 Endorsements (Export)		T	Chicago Phoe...		\$5,000.00	
03						

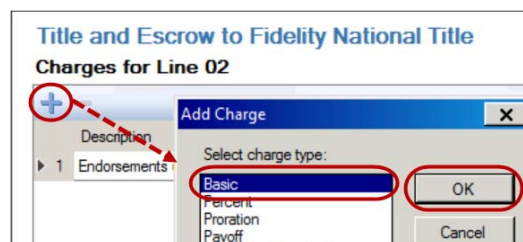
Continue on to the next step if you want endorsements listed on the CSS otherwise skip to **Step 16**.

While still on the **Statement Charges** screen,

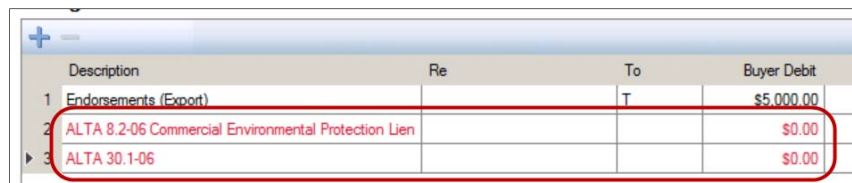
- › Check the **Itemize** check box
- › Click the **Line** number link

Title and Escrow to Fidelity National Title									
					\$20,000.00	\$0.00	\$0.00	\$0.00	
Description	Re	To	Name	C/D	Buyer Debit	Buyer Credit	Seller Debit	Seller Credit	Itemize
01 Title Premium (Export)		T	Chicago Phoe...		\$15,000.00				
02 Endorsements (Export)		T	Chicago Phoe...		\$5,000.00				<input checked="" type="checkbox"/>
03									

- › Click the **Add Charge**  icon; select **Basic** when prompted



- › Enter the endorsement **Description**
- › Enter **0.00** in **Buyer Debit** field; this will show on the CSS




Description	Re	To	Buyer Debit
1 Endorsements (Export)		T	\$5,000.00
2 ALTA 8.2-06 Commercial Environmental Protection Lien			\$0.00
3 ALTA 30.1-06			\$0.00

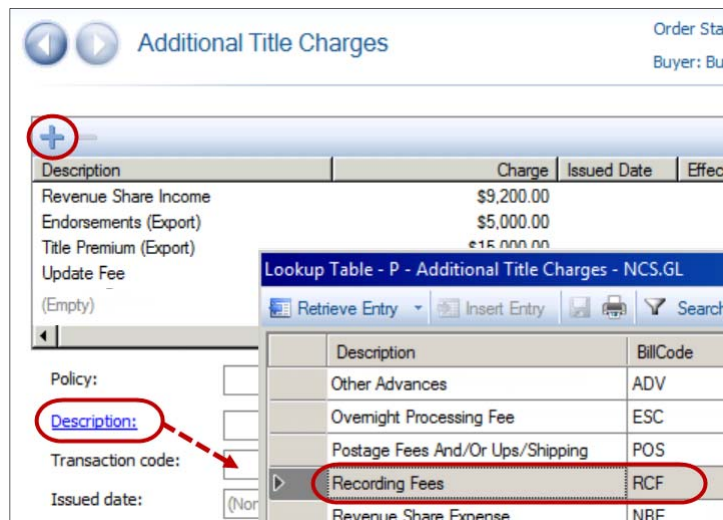
- › Repeat **Steps j-k** for each endorsement to be entered

Processing an Escrow Only Order

16. Enter Recording charges – you can use the **Additional Title Charges** screen or enter directly on the **Statement Charges** screen.

› If you use the **Additional Title Charges** screen

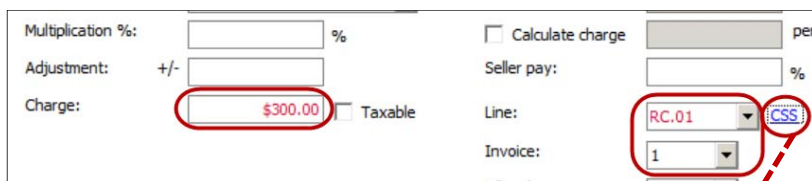
- i. Click the **Add Title Charge**  icon
- ii. Click the **Description** link
- iii. Double-click the **Recording Fees** entry



Description	Charge	Issued Date	Effect
Revenue Share Income	\$9,200.00		
Endorsements (Export)	\$5,000.00		
Title Premium (Export)	\$15,000.00		
Update Fee			
(Empty)			

Description	BillCode
Other Advances	ADV
Overnight Processing Fee	ESC
Postage Fees And/Or Ups/Shipping	POS
Recording Fees	RCF
Revenue Share Expense	NBE

- iv. In the **Charge** field, enter the amount provided by the outside Title Company
- v. Verify **Line** = RC.01
- vi. Verify an **Invoice** number is assigned
- vii. Click the **CSS** link
- viii. Verify the **To** code = the payee provided by the outside Title Company

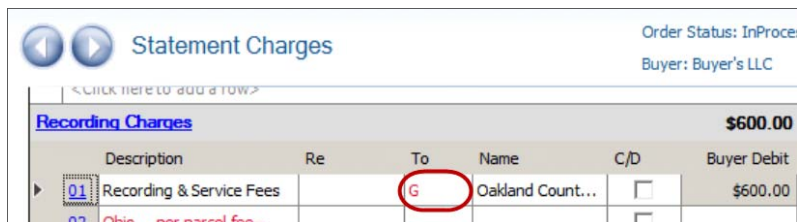


Multiplication %: % ☐ Calculate charge per

Adjustment: +/- Seller pay: %

Charge: ☐ Taxable Line: **CSS**

Invoice:



Description	Re	To	Name	C/D	Buyer Debit
01 Recording & Service Fees		G	Oakland Count...	<input type="checkbox"/>	\$600.00
02 Ohio... per parcel fee--				<input type="checkbox"/>	

› If you use the **Statement Charges** screen to enter the fee directly on **Line RC.01**

- i. Click the **Line** number link; enter or select the,
 - a. **Description**
 - b. **To** code = the payee provided by the outside Title Company
 - c. **Buyer Debit** = recording fee



Description	Re	To	Name	C/D	Buyer Debit
01 Recording & Service Fees				<input type="checkbox"/>	
02 Ohio... per parcel fee--				<input type="checkbox"/>	

Description	Re	To	Buyer Debit
1 Recording Fees		G	\$300.00
2 Non Standard Conforming Fee		G	

NOTE: You will use the **Statement Charges** screen to update actuals (if needed) after closing.

If you need to update actuals,

1. Click the **Line** number link for Line **RC.01**
2. On the next available line, enter the actual amount
3. Zero out the original estimated amount

Transfer and Recording Charges

Charges for Line 01

Description	Re	To	Buyer Debit
4 Recording Service Fee		A	
5 Refund to Buyer		BA	
6 Recording Fee - Simplifile		A2	
7 Recording Fees		A2	\$300.00

Transfer and Recording Charges

Charges for Line 01

Description	Re	To	Buyer Debit
1 Recording Fee		G	\$200.00
2 Non Standard Conforming Fee		G	
3 e-Filing Fee		A2	\$18.00
4 Recording Service Fee		A	\$82.00
5 Refund to Buyer		BA	
6 Recording Fee - Simplifile		A2	
7 Recording Fees		A2	\$0.00

Actuals

Original estimated amount

Entering Revenue Sharing Entries

17. Navigate to the **Additional Title Charges** screen
18. Add the **Revenue Share Expense**

- › Highlight the **Revenue Share Expense** entry in the grid
- › In the **Charge** field, enter the amount as a **negative** number

Additional Title Charges
Order Status: InProcess
Buyer:

Description	Charge	Issued Date	Effective Date	Line	Invoice	Bill Code
Search & Exam				2		SEA
Copies				2		CPY
Update Fee				2		SEA
Closing Fees						ESC
Revenue Share Expense	(\$9,200.00)			1		NBE
Revenue Share Income						NBI

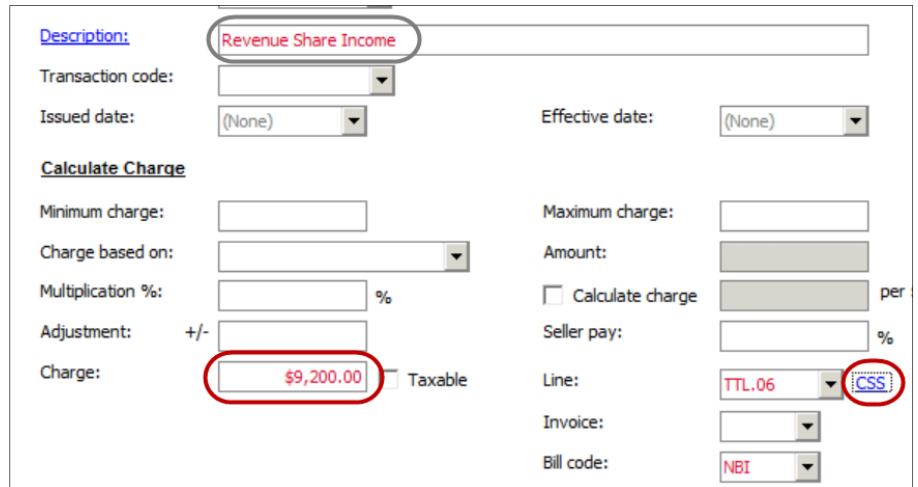
Calculate Charge

Minimum charge:
Charge based on:
Multiplication %: %
Adjustment: +/-
Charge: Taxable

Maximum charge:
Amount:
☐ Calculate charge per \$1000
Seller pay: %
Line:
Invoice:
Bill code:

19. Add the Revenue Share Income

- › Highlight the **Revenue Share Income** entry in the grid
- › In the **Charge** field, enter the same amount as the **Revenue Share Expense**
- › Click the **CSS** link

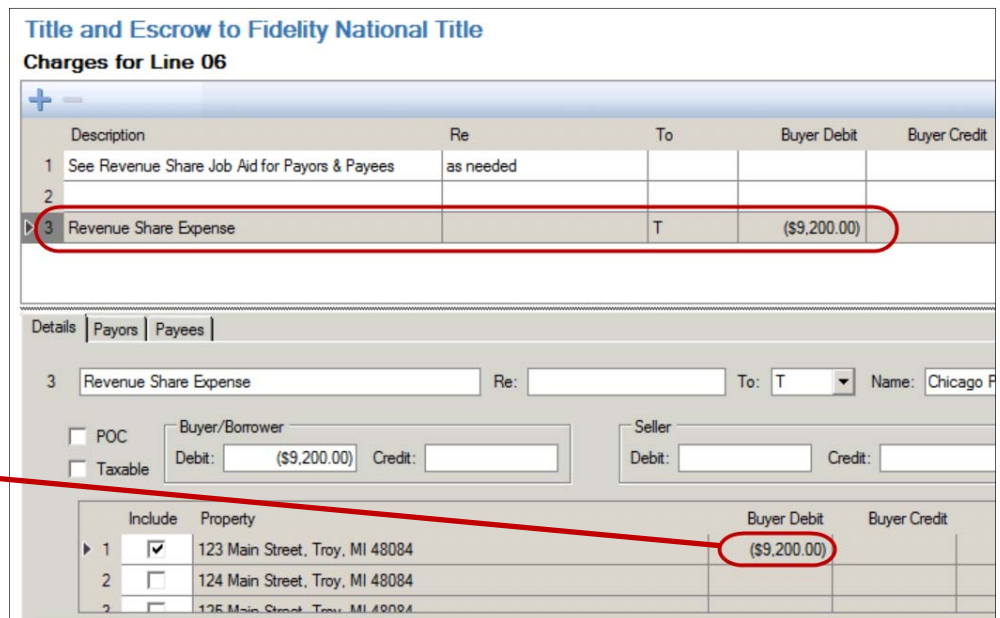


- › Click the **Line** number link of the line assigned



Line	Description	Re	To	Name	C/D	Buyer Debit	Buyer Credit
01	Endorsements (Export)		T	Chicago Phoe...		\$5,000.00	
02	Title Premium (Export)		T	Chicago Phoe...		\$15,000.00	
03	Search		T	Chicago Phoe...		\$300.00	
04	Exam		T	Chicago Phoe...		\$250.00	
05	Copies		T	Chicago Phoe...		\$50.00	
06	Revenue Sharing						

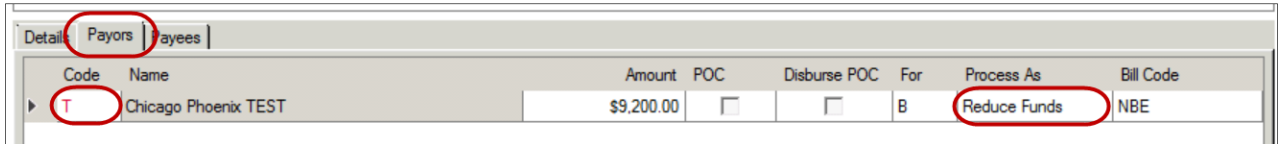
- › Highlight the **Revenue Share Expense** entry



Line	Description	Re	To	Buyer Debit	Buyer Credit
1	See Revenue Share Job Aid for Payors & Payees	as needed			
2					
3	Revenue Share Expense		T	(\$9,200.00)	

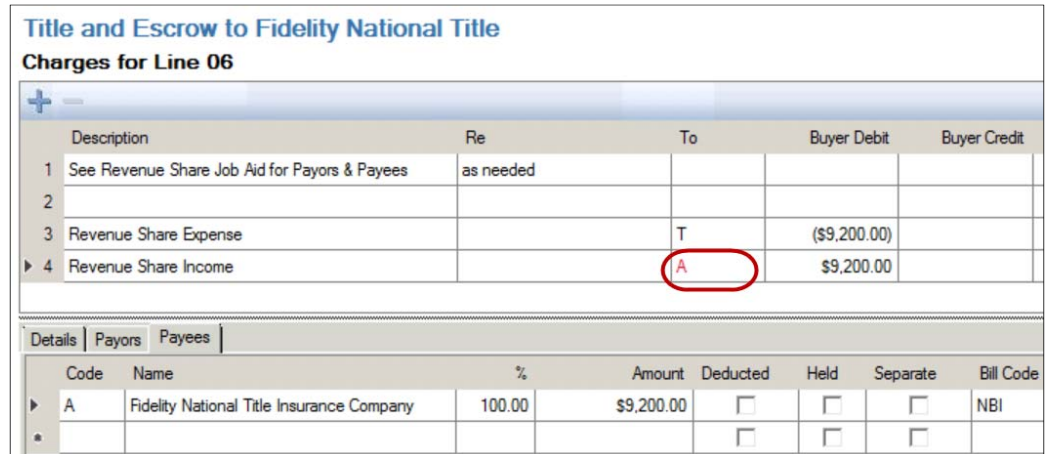
NOTE: If the order has multiple properties, CRRAR validation rules require the Revenue Share Income/Expense entries be associated with only **one** property. Enter the total amount in the **Buyer Debit** field of the first property.

- › Click the **Payors** tab
- › From the **Code** drop-down, select **T**
- › Verify **Process as = Reduce Funds**; click the **Close** button



Code	Name	Amount	POC	Disburse POC	For	Process As	Bill Code
T	Chicago Phoenix TEST	\$9,200.00	<input type="checkbox"/>	<input type="checkbox"/>	B	Reduce Funds	NBE

- › Highlight the **Revenue Share Income** entry
- › From the **To-**code drop-down, select **A**
- › Click the **Close** button



Title and Escrow to Fidelity National Title
Charges for Line 06

Description	Re	To	Buyer Debit	Buyer Credit
1 See Revenue Share Job Aid for Payors & Payees	as needed			
2				
3 Revenue Share Expense		T	(\$9,200.00)	
4 Revenue Share Income		A		\$9,200.00

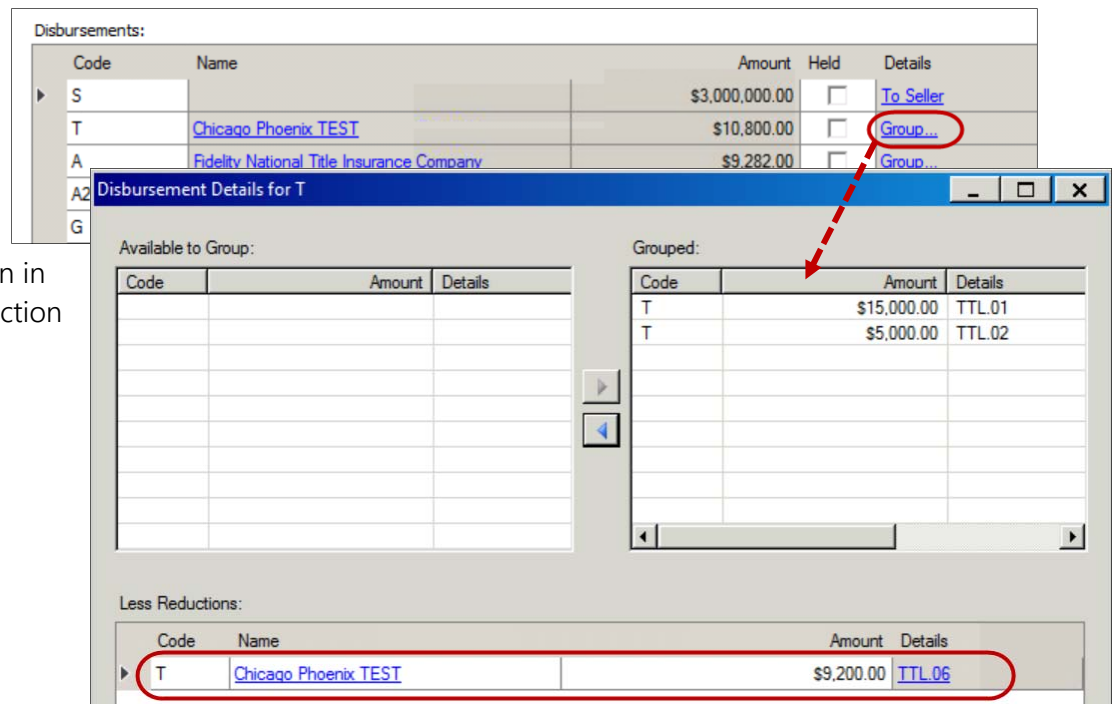
Code	Name	%	Amount	Deducted	Held	Separate	Bill Code
A	Fidelity National Title Insurance Company	100.00	\$9,200.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	NBI

REMEMBER: If the order has multiple properties, CRRAR validation rules require the Revenue Share Income/Expense entries be associated with only **one** property. Click the **Details** tab, enter the total amount in the **Buyer Debit** field of the first property.

20. Navigate to the **Order Transactions** screen

21. In the **Disbursements** section, click the **Group** link for the T-outside Title Company Contact

22. Verify the **Revenue Share Expense** is shown in the **Less Reductions** section



Disbursements:

Code	Name	Amount	Held	Details
S		\$3,000,000.00	<input type="checkbox"/>	To Seller
T	Chicago Phoenix TEST	\$10,800.00	<input type="checkbox"/>	Group...
A	Fidelity National Title Insurance Company	\$9,282.00	<input type="checkbox"/>	Group...

Disbursement Details for T

Code	Amount	Details
T	\$15,000.00	TTL.01
T	\$5,000.00	TTL.02

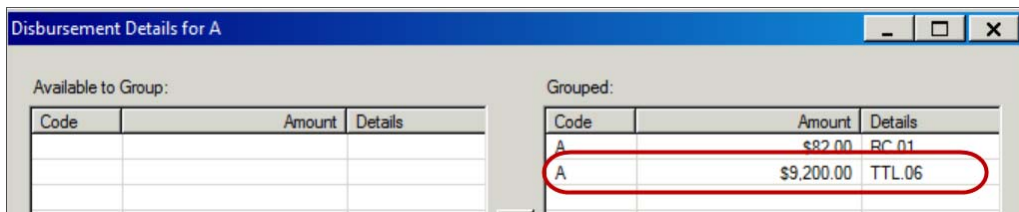
Less Reductions:

Code	Name	Amount	Details
T	Chicago Phoenix TEST	\$9,200.00	TTL.06

Processing an Escrow Only Order

23. Click the **Group** link for the **A-Contact**

24. Verify the **Revenue Share Income** is shown



Available to Group:			Grouped:		
Code	Amount	Details	Code	Amount	Details
			A	\$82.00	RC.01
			A	\$9,200.00	TTL.06

25. From the **Order** ribbon, click the **Documents** button

26. Search for, and select, the applicable **Payment Transmittal Form** for your order

- › **Payment Transmittal Form (Branch)**
- › **Payment Transmittal Form (Agency)**

27. **Preview** and **Publish** the document to smartVIEW

28. Distribute to the outside Title Company

