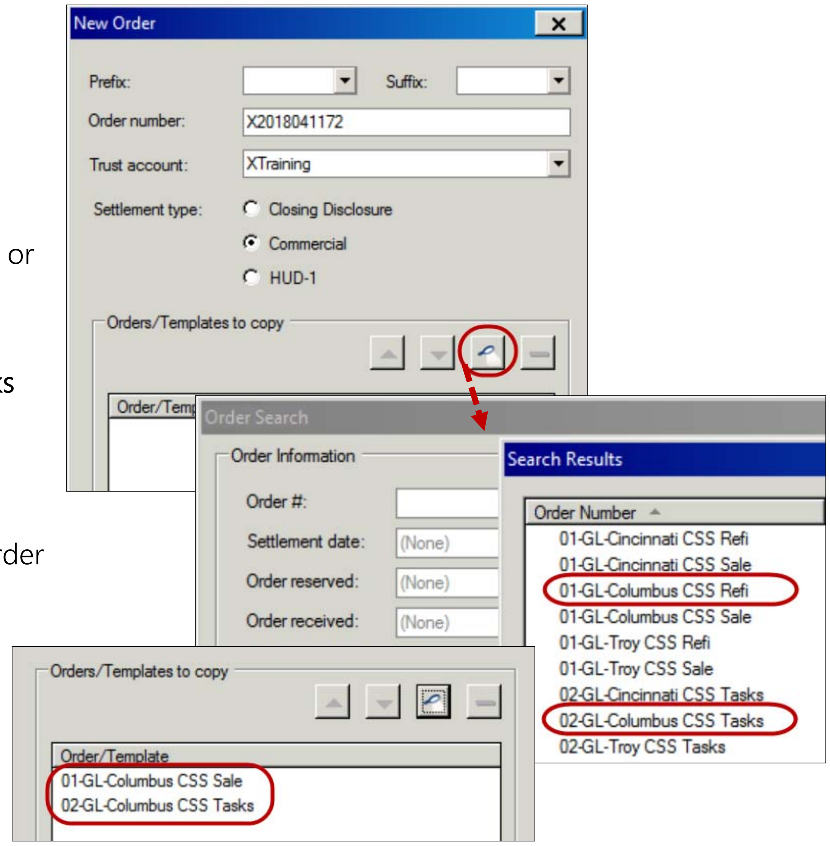
Follow these steps to open an Escrow Only order, enter fees and submit your Payment Transmittal form to the outside Title Company.

Creating the Order

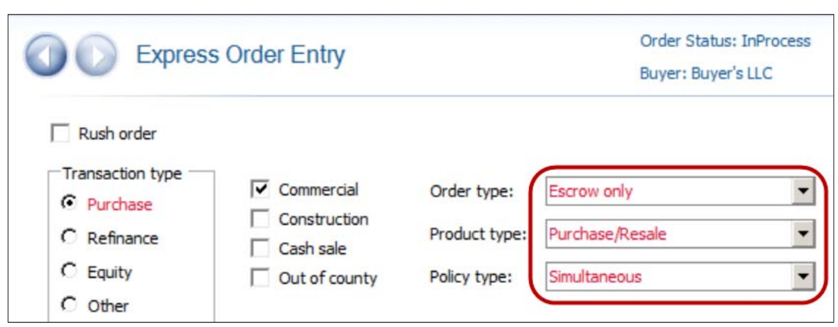
1. Create a new order
2. Apply templates
    a) Click the **Search** icon; press the **Enter** key
    b) Highlight the appropriate template
        - 01-GL-[*applicable city*] CSS [Refi or Sale]
    c) Holding the **Ctrl** key, highlight the,
        - 02-GL-[*applicable city*] CSS Tasks template
 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



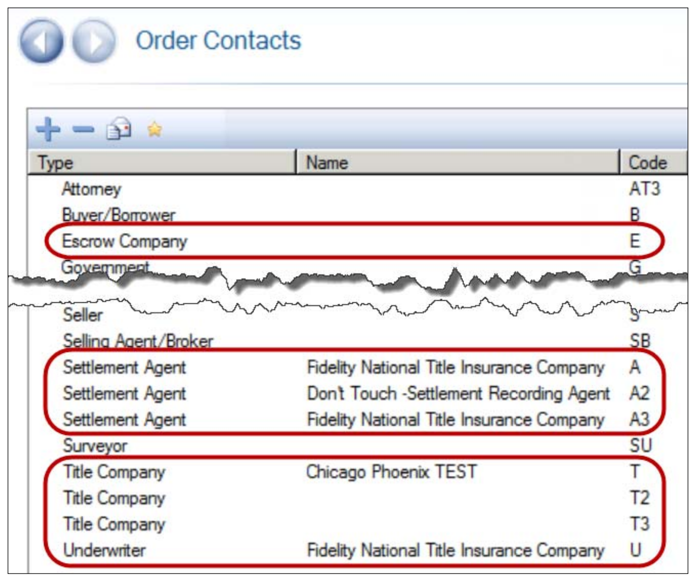
5. Select the **Escrow Officer/Closer** and **Pre-closer/Escrow assistant**
6. Enter the **Sales price** (if applicable)

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

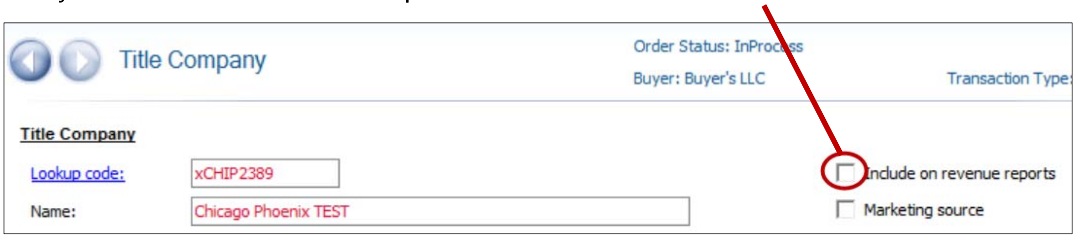
NOTE: If entering multiple loans and/or properties, reach out to your Power User or SoftPro Support Staff with questions.

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

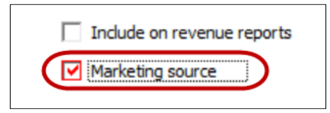


- **T2**-Title Company = can be used for additional Title Companies on a multi-state transaction
- **T3**-Title Company = can be used for additional Title Companies on a multi-state transaction

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

- U-Underwriter, leave as default entry

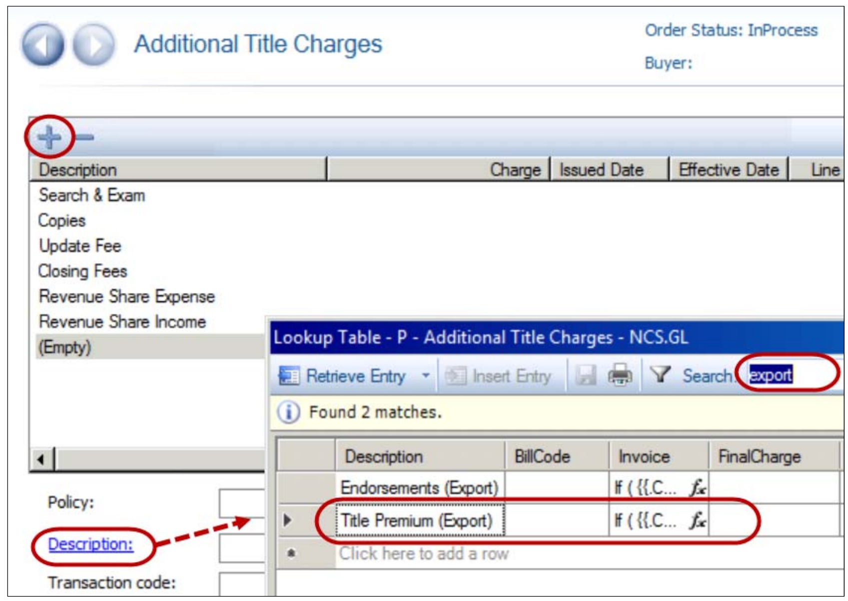
12. Enter all remaining Contacts using placeholders first; when entering the Contact that gave you the order, check the **Marketing source** check box



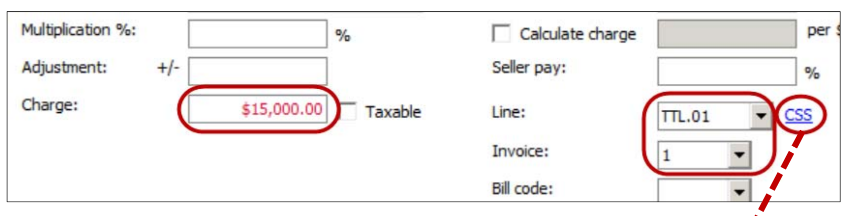
Entering Charges

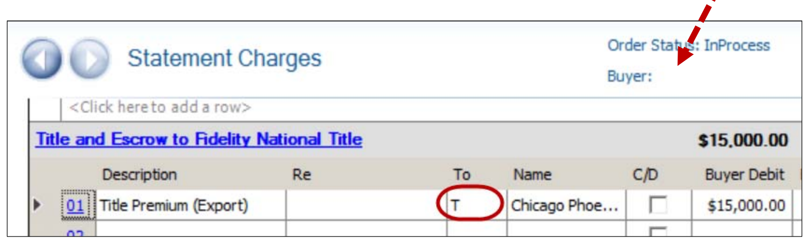
13. Navigate to the **Additional Title Charges** screen
14. Enter Title Premiums

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



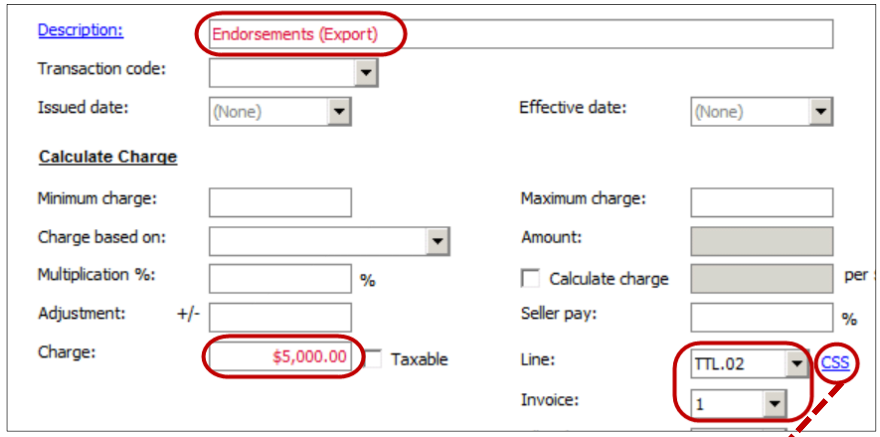
   - In the **Charge** field enter the total premium
   - Verify the fee is assigned to a **Line** and **Invoice**
   - Click the **CSS** link to navigate to the **Line** assigned on the **Statement Charges** screen
   - Verify the **To** code = **T**

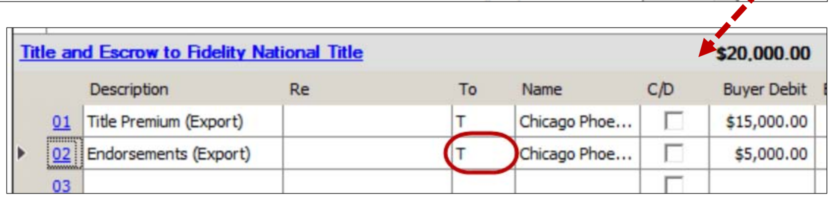




15. Enter Endorsements

- 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

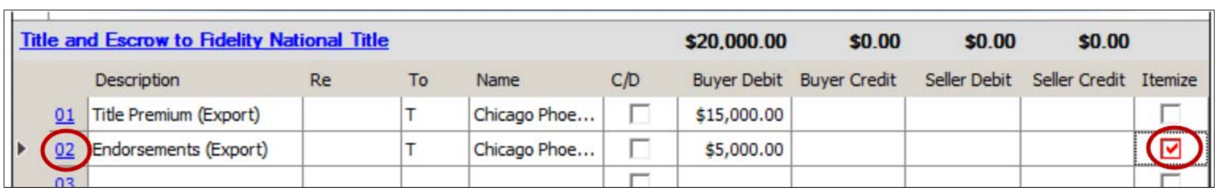




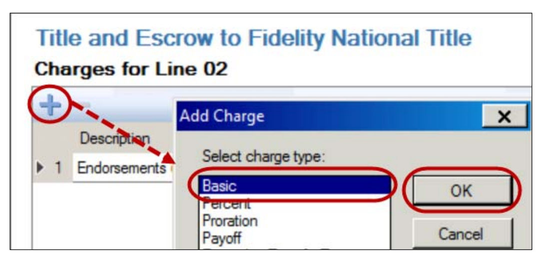
Continue on to the next step if you want endorsements listed on the CSS otherwise skip to **Step 16**.

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

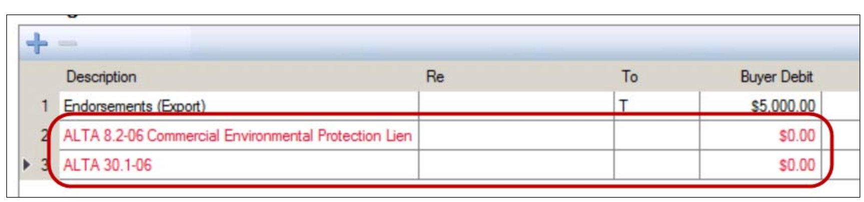
- Check the **Itemize** check box
- Click the **Line** number link



- 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

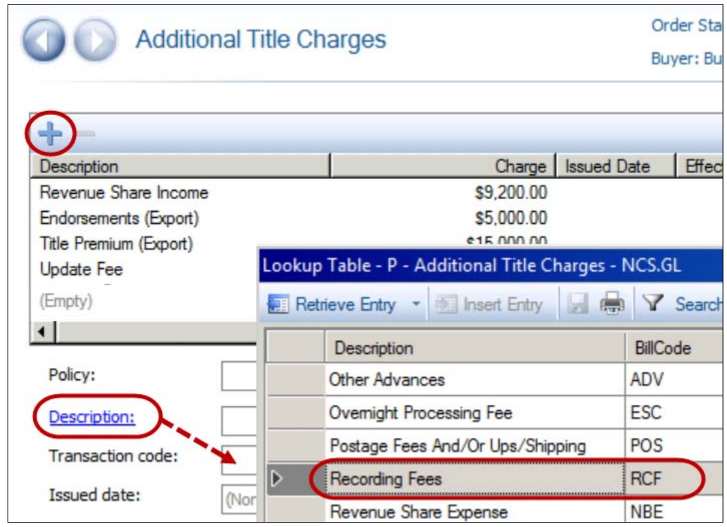


- Repeat **Steps j-k** for each endorsement to be entered

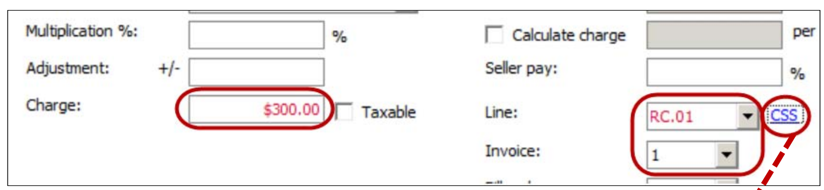
16. Enter Recording charges – you can use the **Additional Title Charges** screen or enter directly on the **Statement Charges** screen.

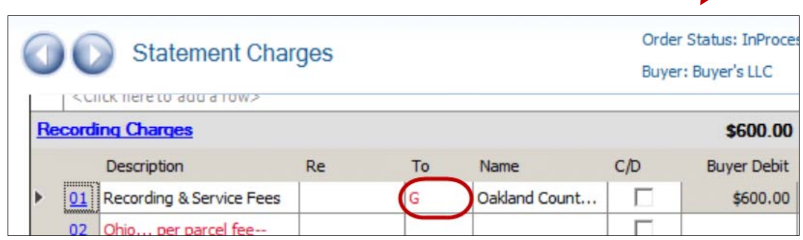
   〉 If you use the **Additional Title Charges** screen

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



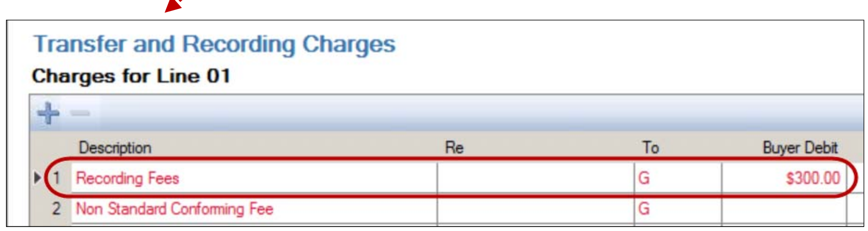
   iv. In the **Charge** field, enter the amount provided by the outside Title Company
   v. Verify **Line** = RC.01
   vi. Verify an **Invoice** number is assigned
   vii. Click the **CSS** link
   viii. Verify the **To** code = the payee provided by the outside Title Company





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

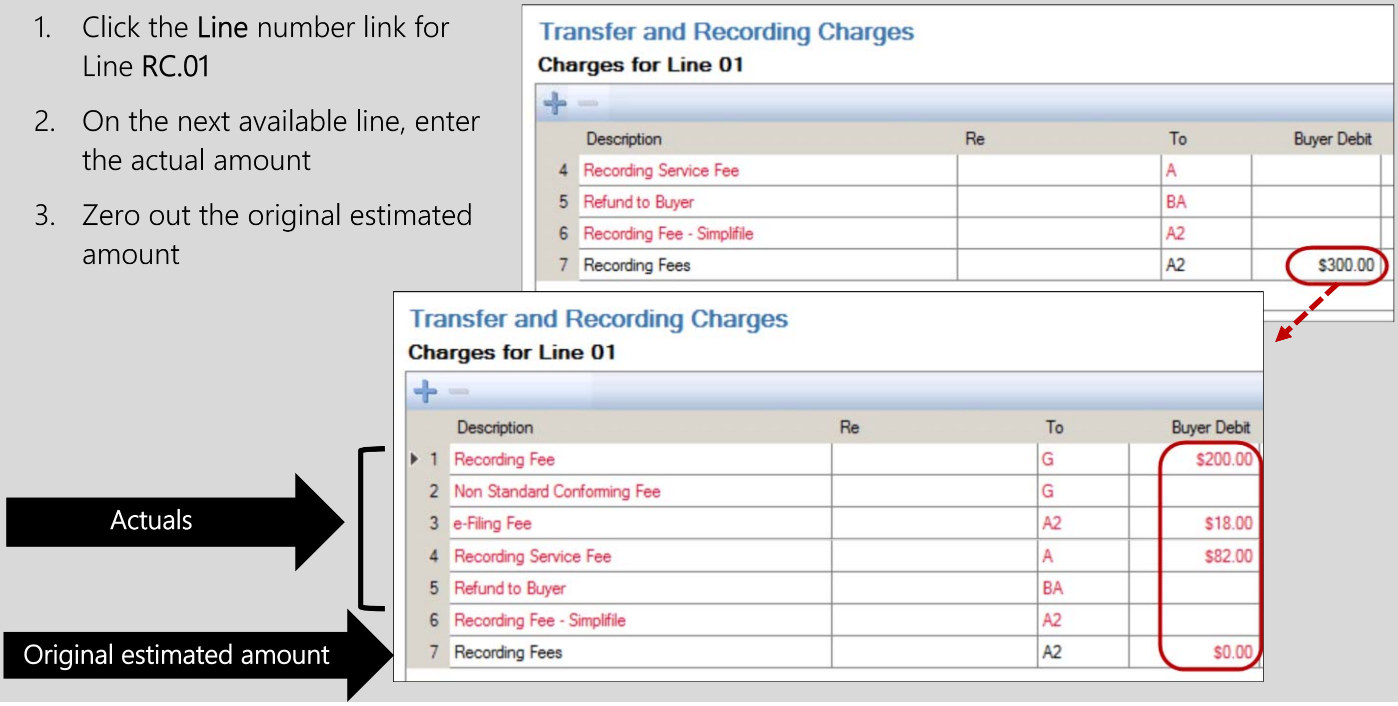
   i. Click the **Line** number link; enter or select the,
      a. **Description**
      b. **To** code = the payee provided by the outside Title Company
      c. **Buyer Debit** = recording fee



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

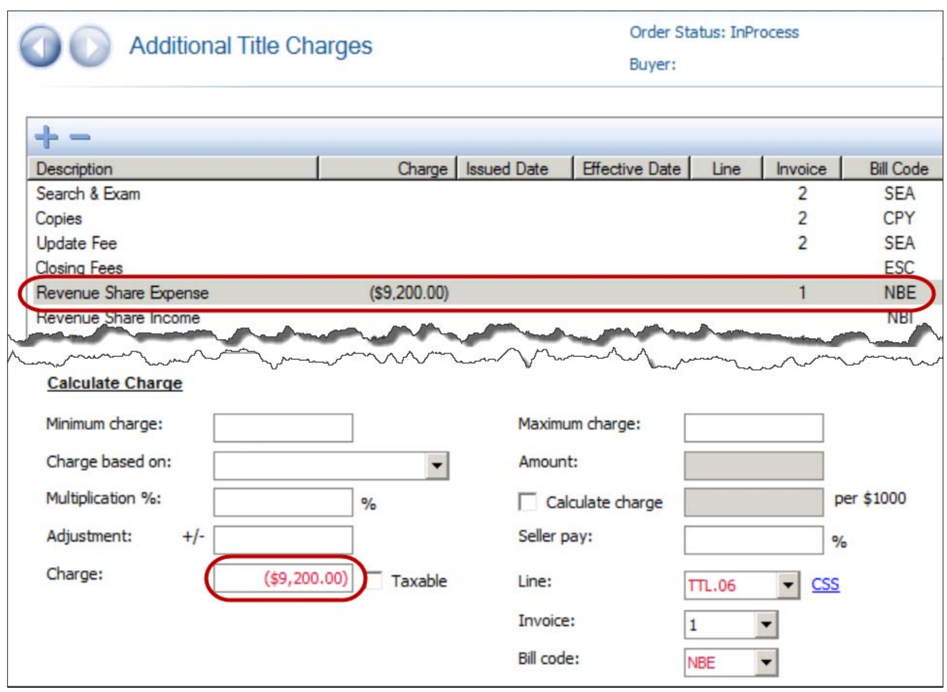
If you need to update actuals,

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



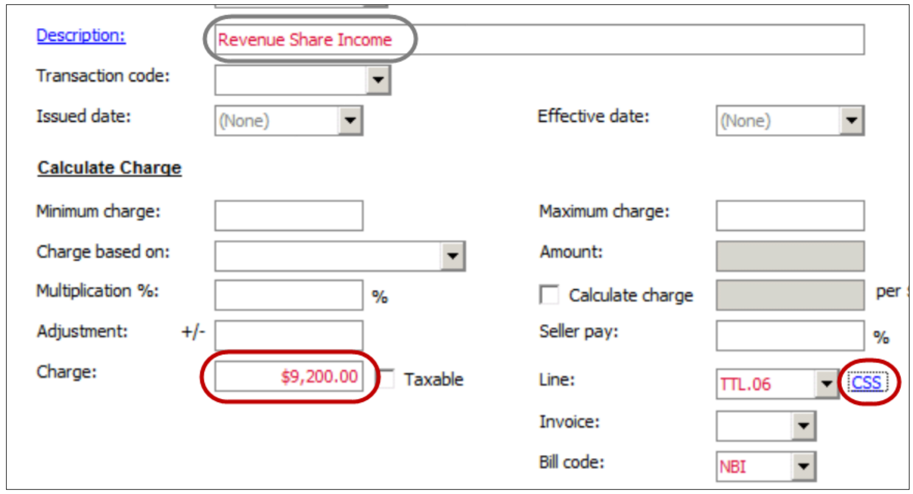
Entering Revenue Sharing Entries

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



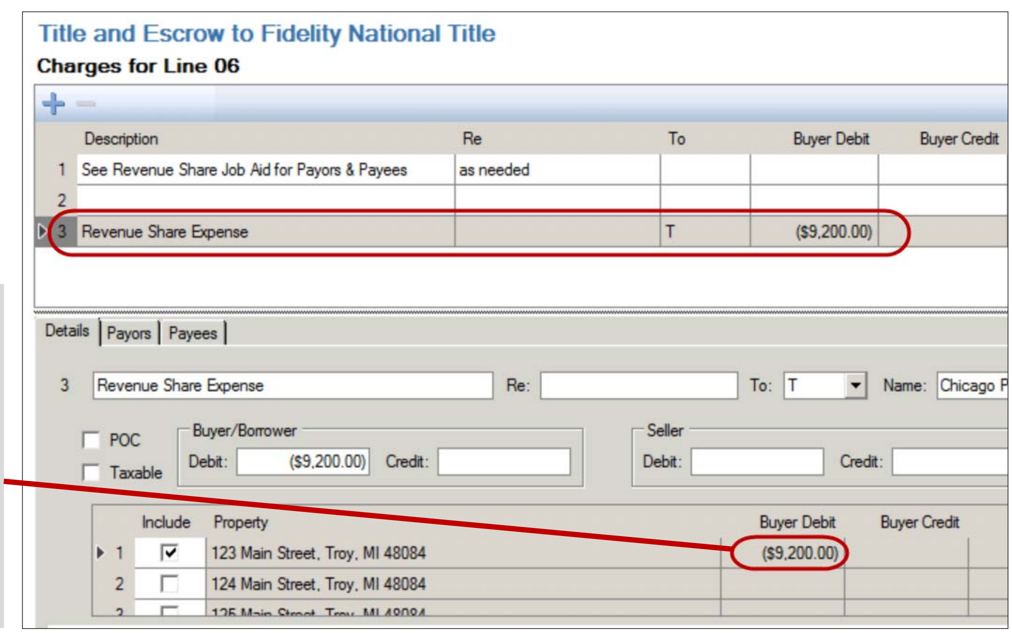
19. Add the **Revenue Share Income**

   - 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



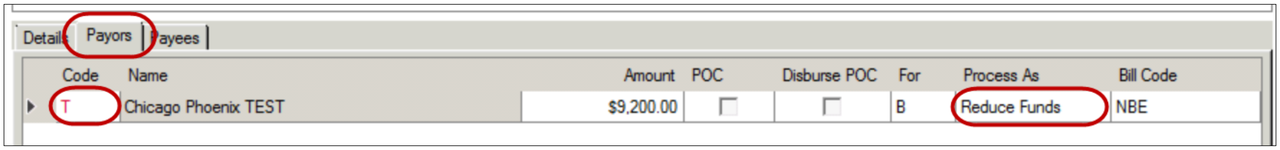
   - Click the **Line** number link of the line assigned

   - Highlight the **Revenue Share Expense** entry

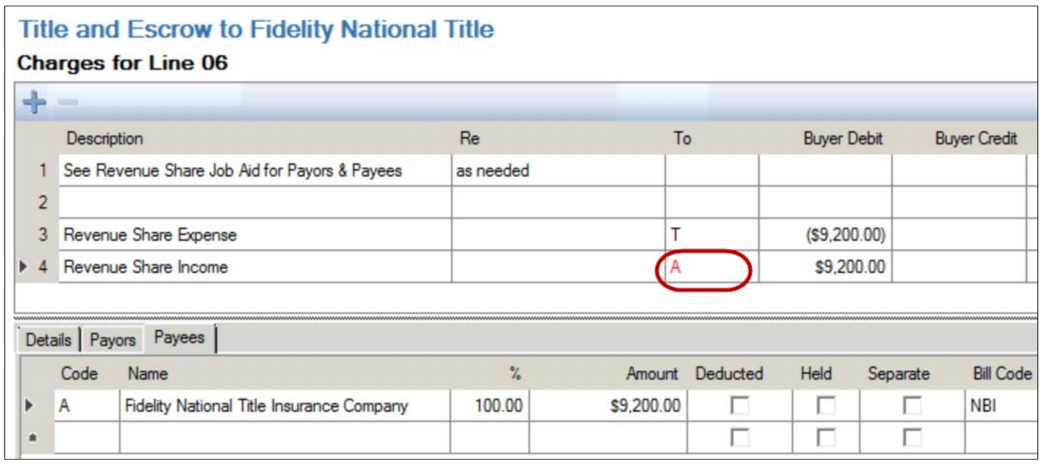


NOTE: If the order has multiple properties, CRRAR validation rules require the Revenue Share Income/Expense entries be associated with only **one** property. Enter the total amount in the **Buyer Debit** field of the first property.

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

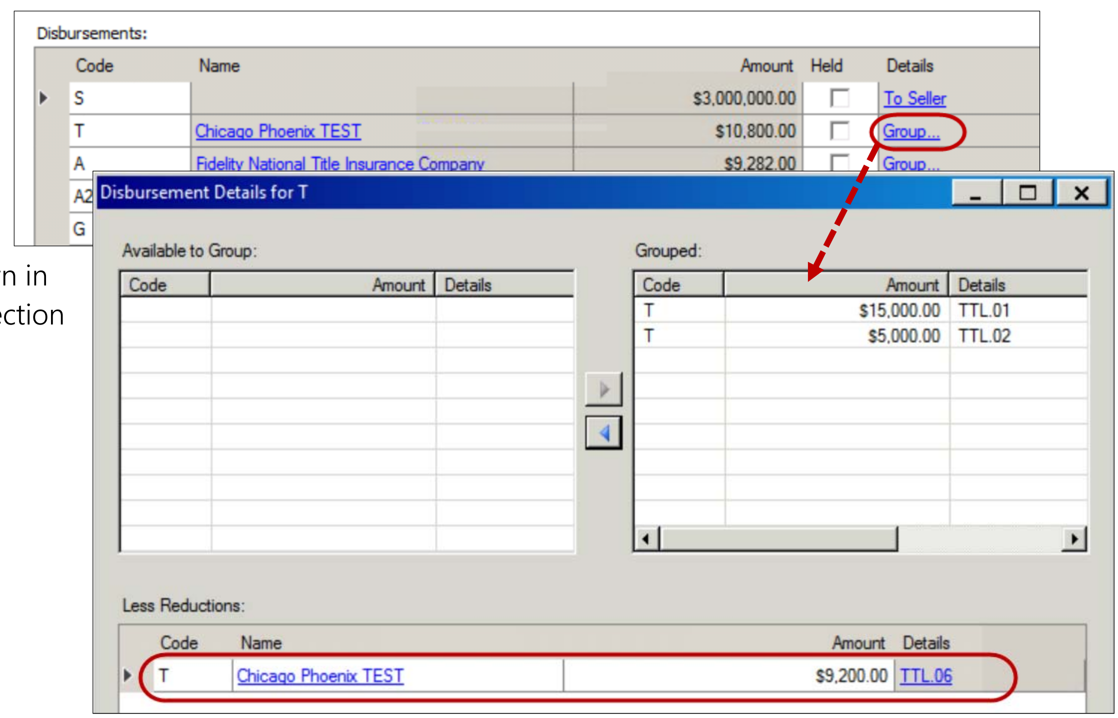


- Highlight the **Revenue Share Income** entry
- From the **To-** code drop-down, select **A**
- Click the **Close** button

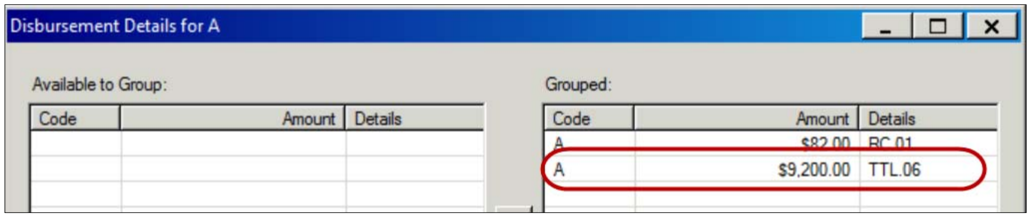


REMEMBER: If the order has multiple properties, CRRAR validation rules require the Revenue Share Income/Expense entries be associated with only **one** property. Click the **Details** tab, enter the total amount in the **Buyer Debit** field of the first property.

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



23. Click the **Group** link for the **A**-Contact
24. Verify the **Revenue Share Income** is shown



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