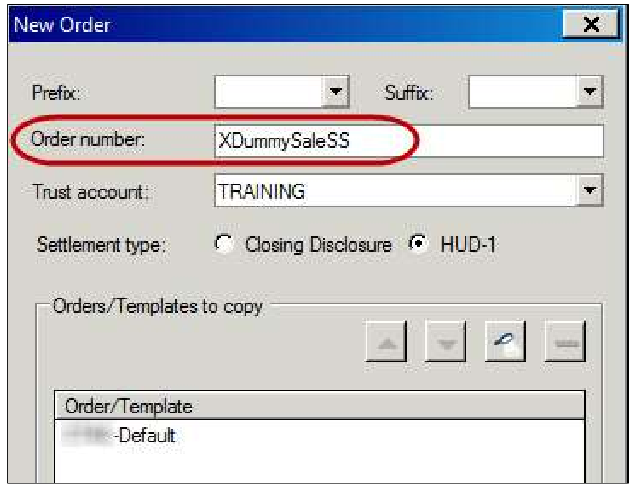
Creating a "Dummy" Order

To generate quotes (a.k.a. called net sheets) for customers, you can create "dummy" or test orders. You can also use these orders to test features and documents without having to worry about the orders being counted in management/Operational reports. Follow these steps to create as many of these orders as you need.

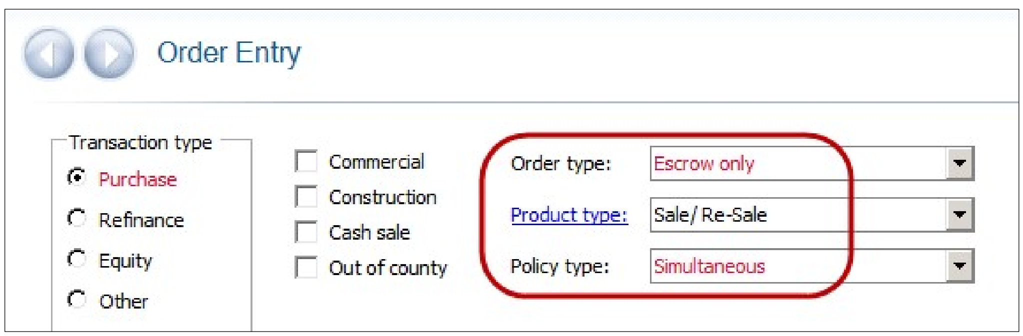
Creating the New Order

1. Press the **Ctrl + N** keyboard shortcut to open a new order
2. If applicable, select a **Suffix**
3. In the **Order number** field, highlight the system-generated order number
4. Enter the test order name including your initials or last name (e.g. XDummySaleSS or SmithTestRefi)
5. Verify the **Trust account**; this should reflect whatever trust account your operation uses
6. Select the **Settlement type** and click the **OK** button



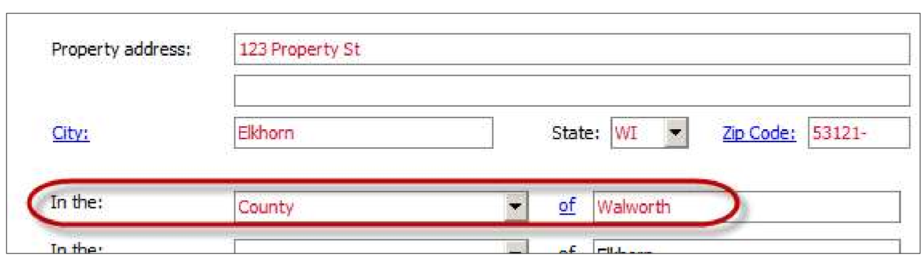
Order Entry screen

7. Enter the appropriate **Order type**, **Product type**, and **Policy type** (or if available, click the **Product type** link to select the types appropriate for the quote or test)



NOTE: It is important your **Order type** is **Escrow only** to avoid the order being submitted to other systems.

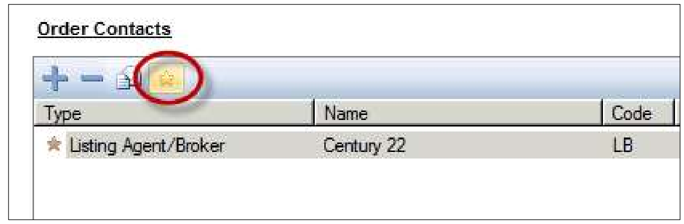
8. Enter a **County**



9. Select a **Property type**

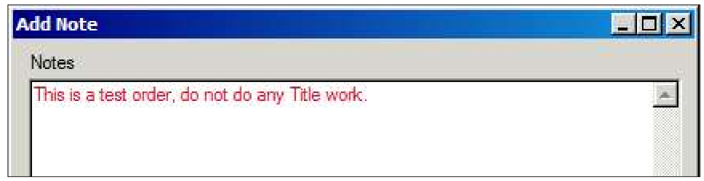
10. In the **Contact** grid, add a Contact

    > **NOTE**: Add an **MB**-Mortgage Broker, **LB**-Listing Agent/Broker, or **SB**-Selling Agent/Broker Contact.



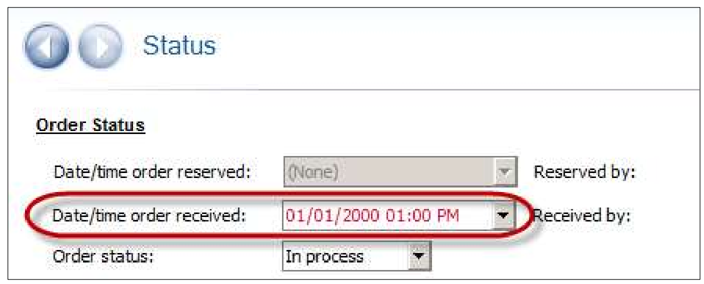
11. Click the **Marketing Source** icon

12. Enter an order note: *This is a test order, do not do any title work.*



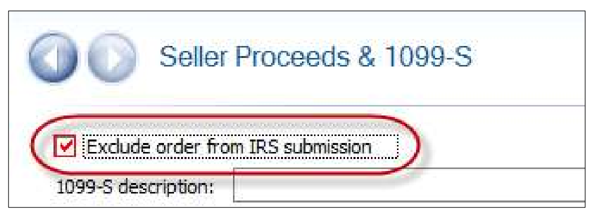
Backdating the Order

13. Navigate to the **Status** screen
14. In the **Date/time order received** field, ‘back date’ the order to the year 2000 to ensure this order falls off the New Orders report



Excluding From 1099 Reporting

15. Navigate to the **Seller Proceeds & 1099-S** screen
16. Check the **Exclude order from IRS submission** check box



Cancelling the Order

17. Press the **Ctrl + Alt + X** keyboard shortcut to cancel the order

> **NOTES**:
> - Do not click the **Submit** button or send the Open Order/Order Summary Sheet to Title.
> - You cannot post receipts or disbursements. To see Register items, look at the **Order Transactions** screen.