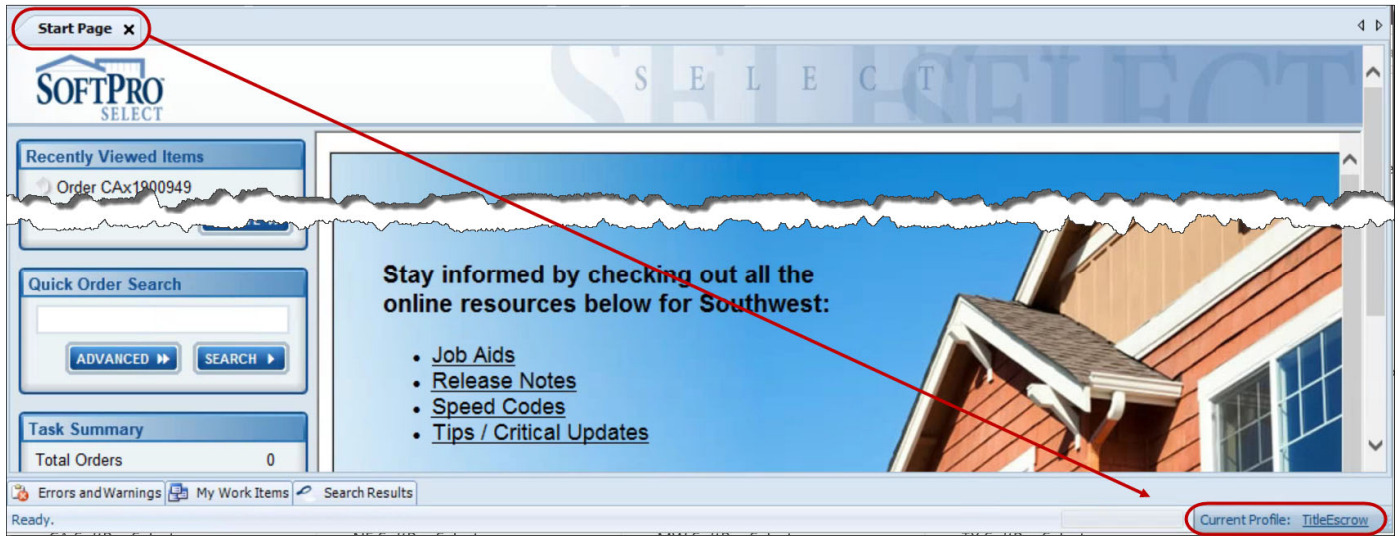


Opening through Submitting the Search Request

Follow these steps to open the order and submit the search request.

Prior to opening a new order,

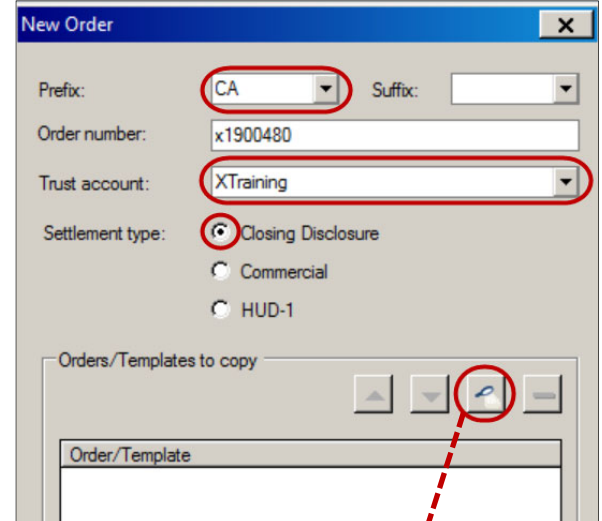
1. Verify **Current Profile** = TitleEscrow




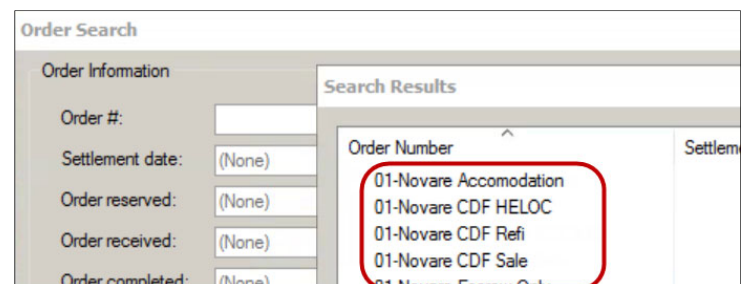
2. **Create** a new order
3. From the **New Order** window select the,
 - a) **Prefix** = select corresponding to the property state
 - b) **Trust account**

NOTE: Refer to the job aid, *Reference Guide – Guide to Selecting the Correct Speed Code/Trust Account* if you are unsure which **Trust account** to select.

- c) **Settlement type**, select the applicable type
 - › **Closing Disclosure** is the default setting and used for all traditional orders
 - › **Commercial** for residential **Title only** and **Property Report** orders
 - › **HUD-1** for reverse mortgage orders



- d) Apply your templates
 - i. Click the **Search**  icon
 - ii. Press the **Enter** key to access all templates
 - iii. Highlight the applicable **01** transaction template (i.e., Sale, Refi)
 - iv. Highlight the corresponding **02 Task** template



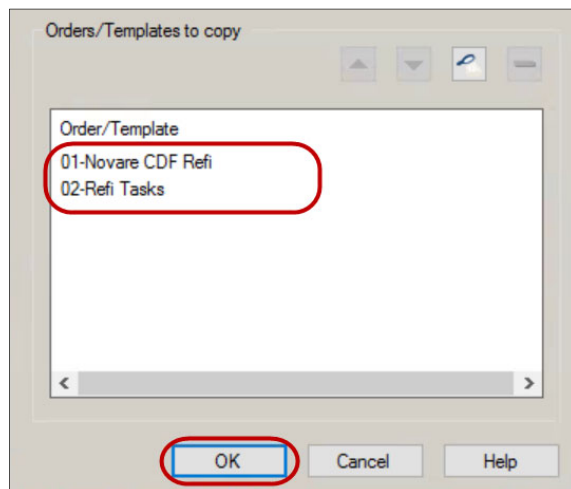
Order Number	Settlement
01-Novare Accomodation	
01-Novare CDF HELOC	
01-Novare CDF Refi	
01-Novare CDF Sale	
01-Novare Escrow Only	

Opening through Submitting the Search Request

- v. Click **OK** to apply the templates

Do **not** select an **03-[GA,TX,UT] R&E Resi** template; it is automatically assigned via the automation process for Georgia, Texas or Utah only when you exit the order.

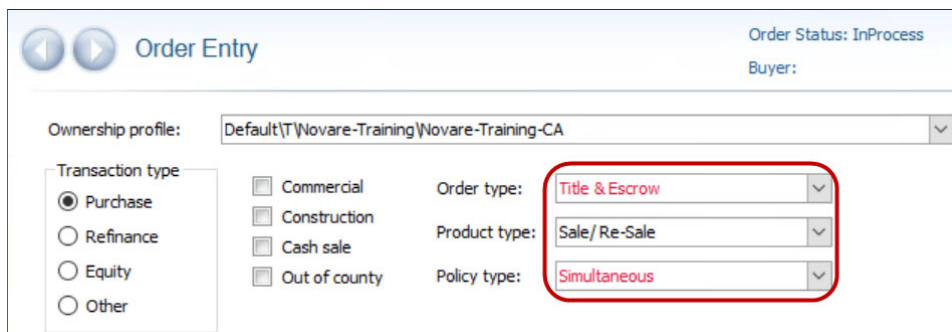
NOTE: Refer to the job aid, *Templates – Applying the Correct Template* if you are unsure which to select.



From the **Order Entry** screen,

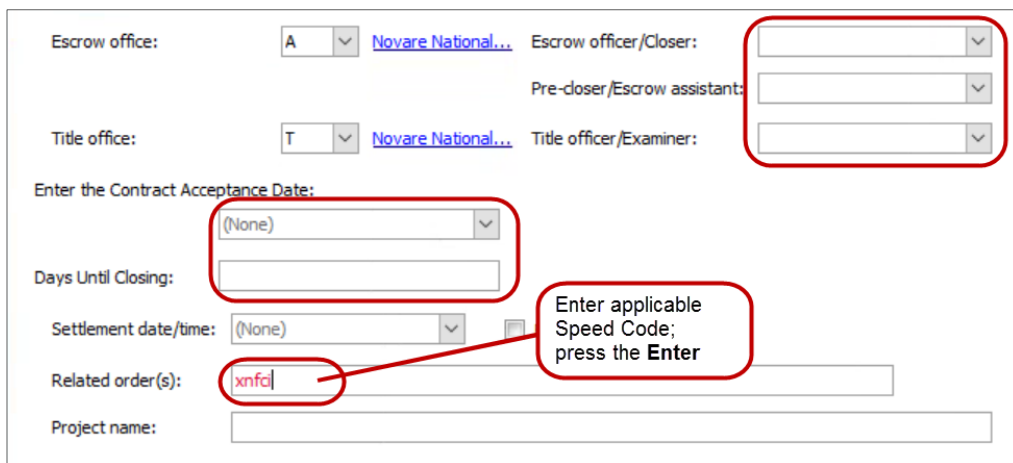
4. Verify the,

- Order type**
- Product type**; refer to the your operations' matrix
- Policy type**; if an **Escrow** only order leave blank



5. Select the,

- Escrow officer/Closer**
- Pre-closer/Escrow assistant**
- Title officer/Examiner**; if an **Escrow only** order leave blank



6. If applicable, enter/select,

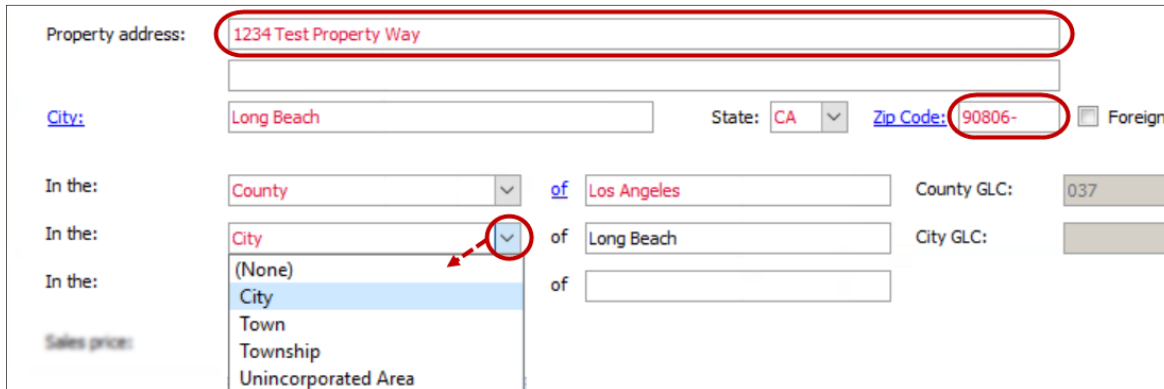
- Enter the Contract Acceptance Date**
- Days Until Closing**

7. In the **Related order(s)** field, enter the applicable speed code; press the **Enter** key

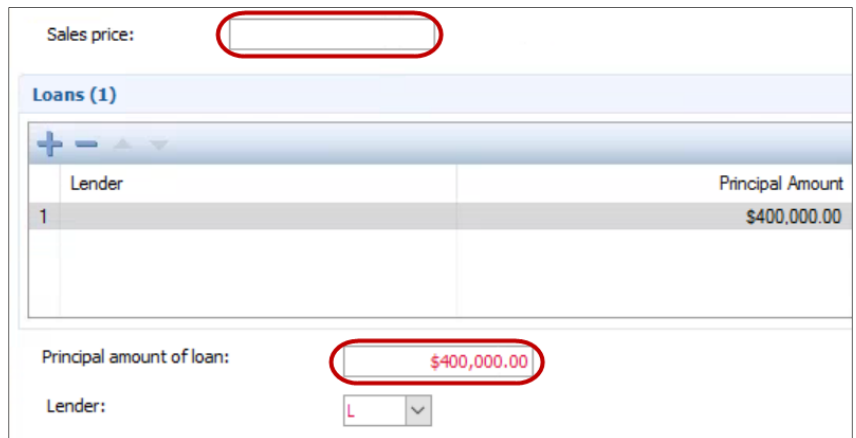
NOTE: Refer to the job aid, *Reference Guide – Guide to Selecting the Correct Speed Code/Trust Account* if you are unsure which speed code to enter.

Opening through Submitting the Search Request

8. Enter the,
 - a) **Property address**
 - b) **Zip Code**; press the **Tab** key to populate **City**, **State** and **County**
9. From the **In the** drop-down, (below **County**), select the municipality designation



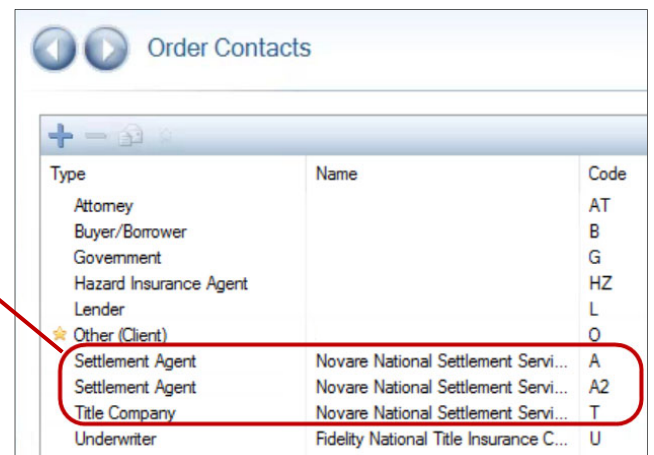
10. If applicable, enter the,
 - a) **Sales price**
 - b) **Principal amount of loan**



Lender	Principal Amount
1	\$400,000.00

Entering Contacts

11. Navigate to the **Order Contacts** screen
12. Verify revenue Contacts (i.e., **A-**, **A2-**, **T-Contacts**) are shown



Type	Name	Code
Attorney		AT
Buyer/Borrower		B
Government		G
Hazard Insurance Agent		HZ
Lender		L
Other (Client)		O
Settlement Agent	Novare National Settlement Servi...	A
Settlement Agent	Novare National Settlement Servi...	A2
Title Company	Novare National Settlement Servi...	T
Underwriter	Fidelity National Title Insurance C...	U

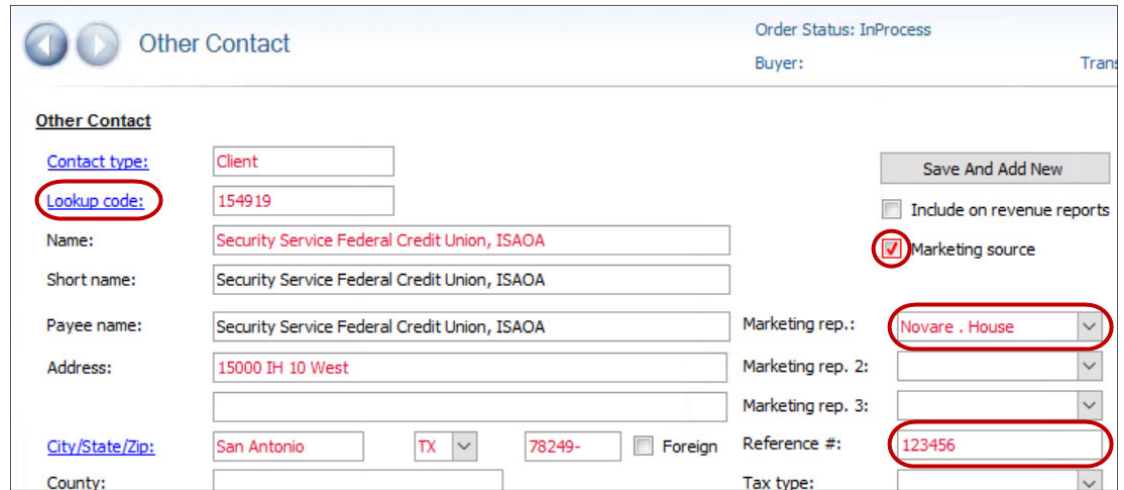
Opening through Submitting the Search Request

13. Double-click the **Other (Client)** placeholder

14. Click the **Lookup code** link to select from the **Lookup Table**

15. Verify the,

- Marketing source** check box is checked
- Marketing rep** is selected
- Reference #** is entered



Order Status: InProcess
Buyer: Trans

Other Contact

Contact type: Client

Lookup code: 154919

Name: Security Service Federal Credit Union, ISAOA

Short name: Security Service Federal Credit Union, ISAOA

Payee name: Security Service Federal Credit Union, ISAOA

Address: 15000 IH 10 West

City/State/Zip: San Antonio TX 78249- Foreign

Country:

Marketing rep.: Novare . House

Marketing rep. 2:

Marketing rep. 3:

Reference #: 123456

Tax type:

Save And Add New

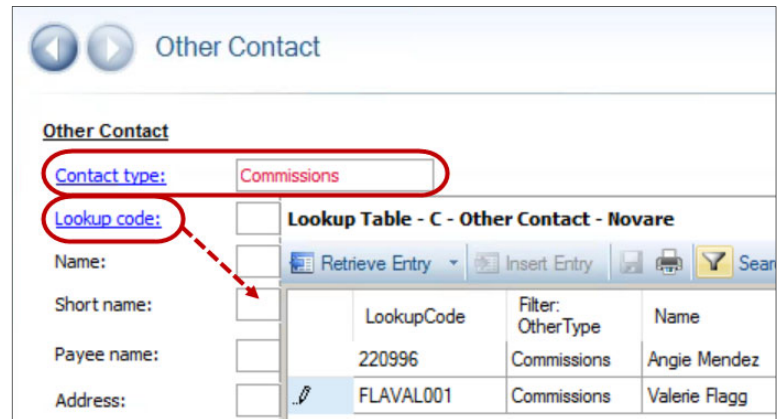
☐ Include on revenue reports

☒ Marketing source

16. If applicable, click the **Add Contacts**  icon to add an **Other Contact** if,

- paying commission to an internal employee
- Contact type = Commission**
- Click the **Lookup code** link
- Double-click to select from the employee from the **Lookup Table**

NOTE: Notify management if the employee not found in the Lookup Table.



Other Contact

Contact type: Commissions

Lookup code:

Name:

Short name:

Payee name:

Address:

Lookup Table - C - Other Contact - Novare

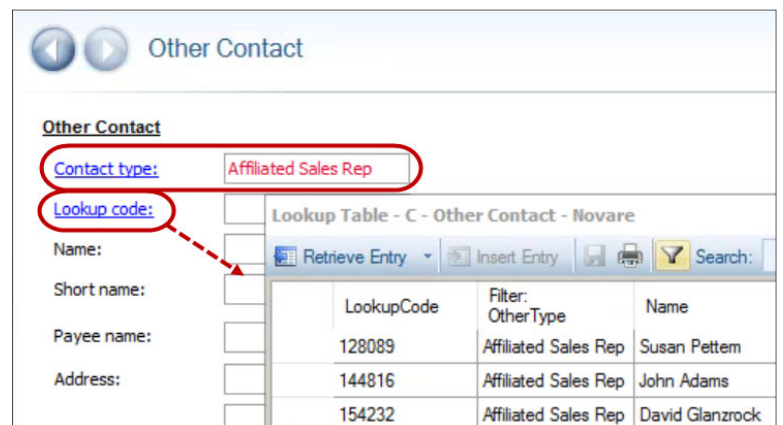
Retrieve Entry Insert Entry Search

LookupCode	Filter: OtherType	Name
220996	Commissions	Angie Mendez
FLAVAL001	Commissions	Valerie Flagg

- paying a referral fee to an outside company

- Contact type = Affiliated Sales Rep**
- Click the **Lookup code** link to select from the **Lookup Table**

NOTE: Refer to your operation's internal master vendor list.



Other Contact

Contact type: Affiliated Sales Rep

Lookup code:

Name:

Short name:

Payee name:


Address:

Lookup Table - C - Other Contact - Novare

Retrieve Entry Insert Entry Search

LookupCode	Filter: OtherType	Name
128089	Affiliated Sales Rep	Susan Pettem
144816	Affiliated Sales Rep	John Adams
154232	Affiliated Sales Rep	David Glanzrock

Opening through Submitting the Search Request

17. Enter all other Contacts using placeholders first; use the **Add Contacts**  icon to add additional Contacts

NOTE: Refer to your operation's internal matrix for additional company/people contacts. If a **Type** already exists, use that first.

18. Save your order

Submitting the Search Request

Follow the steps in the appropriate section to submit your search request.

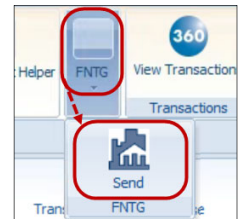
- > Submitting to FNTG
- > Submitting to TitleWave
- > Using Automation to Submit (auto-email)
- > All others Submissions

Submitting to FNTG

1. Navigate to the **Order Contacts** screen
2. Verify the,
 - a) **Other (Searcher) Contact** is **FNTG Service Center-EMAIL**
 - b) **T-Contact** is a Novare revenue Contact
3. From the **Order** ribbon, click the **FNTG > Send** button

Other (Notary)	Excel Notary, Inc.	O4
Other (Searcher)	FNTG Service Center-EMAIL	O5
Settlement Agent	Novare National Settlement Servi...	A
Title Company	Novare National Settlement Servi...	T
Title Company	outside title	T2

NOTE: The **FNTG** site will identify if required information is missing.



Once you receive the confirmation number,

4. Navigate to the **Order Contacts** screen
5. Double-click the **Other (Searcher) Contact**
6. In the **Reference #** field, enter the confirmation number

Other Contact
Order Status: InProcess
Buyer:

Other Contact

Contact type:
Searcher

Lookup code:
546

Name:
FNTG Service Center-EMAIL

Short name:
FNTG Service Center-EMAIL

Payee name:
FNTG Service Center-EMAIL

Address:
6500 Pinecrest Drive, Suite 600

City/State/Zip:
Plano TX 75024-
Foreign

Save And Add New

☐ Include on revenue reports

☐ Marketing source

Marketing rep.:

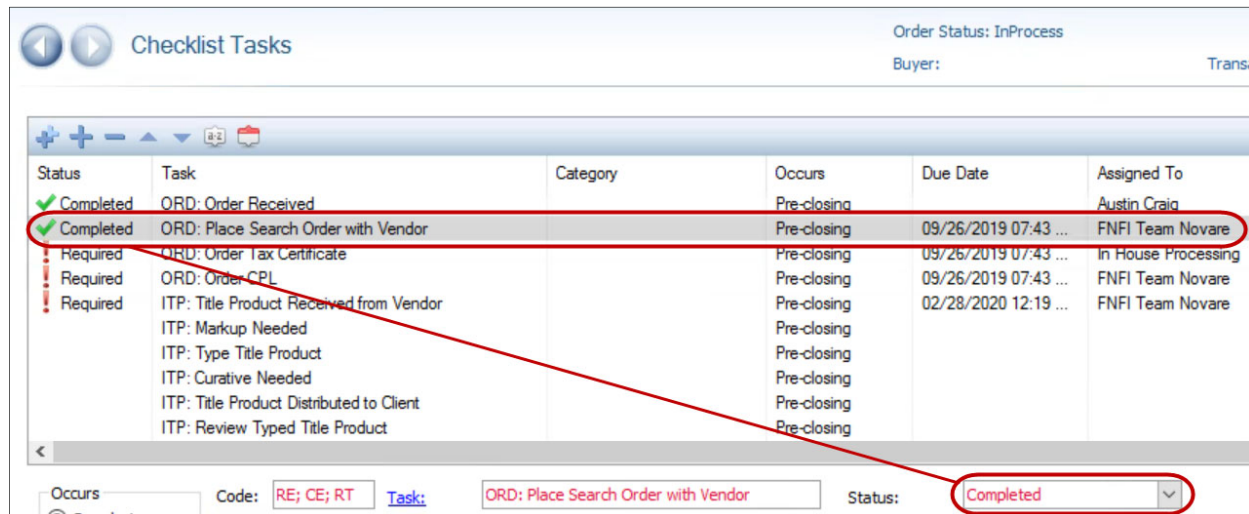
Marketing rep. 2:

Marketing rep. 3:

Reference #:
enter confirmation #

Opening through Submitting the Search Request

7. Click the **Checklist Tasks** button
8. Highlight the **ORD: Place Search Order with Vendor** task in the grid
9. From the **Status** drop-down, select **Completed**



Status	Task	Category	Occurs	Due Date	Assigned To
Completed	ORD: Order Received		Pre-closing		Austin Craig
Completed	ORD: Place Search Order with Vendor		Pre-closing	09/26/2019 07:43 ...	FNFI Team Novare
Required	ORD: Order Tax Certificate		Pre-closing	09/26/2019 07:43 ...	In House Processing
Required	ORD: Order CPL		Pre-closing	09/26/2019 07:43 ...	FNFI Team Novare
Required	ITP: Title Product Received from Vendor		Pre-closing	02/28/2020 12:19 ...	FNFI Team Novare
	ITP: Markup Needed		Pre-closing		
	ITP: Type Title Product		Pre-closing		
	ITP: Curative Needed		Pre-closing		
	ITP: Title Product Distributed to Client		Pre-closing		
	ITP: Review Typed Title Product		Pre-closing		

Occurs: Code: RE; CE; RT Task: ORD: Place Search Order with Vendor Status: Completed

10. Save and exit the order

Submitting to TitleWave

Refer to the job aid, *SoftPro 360 – TitleWave* for the submission process.

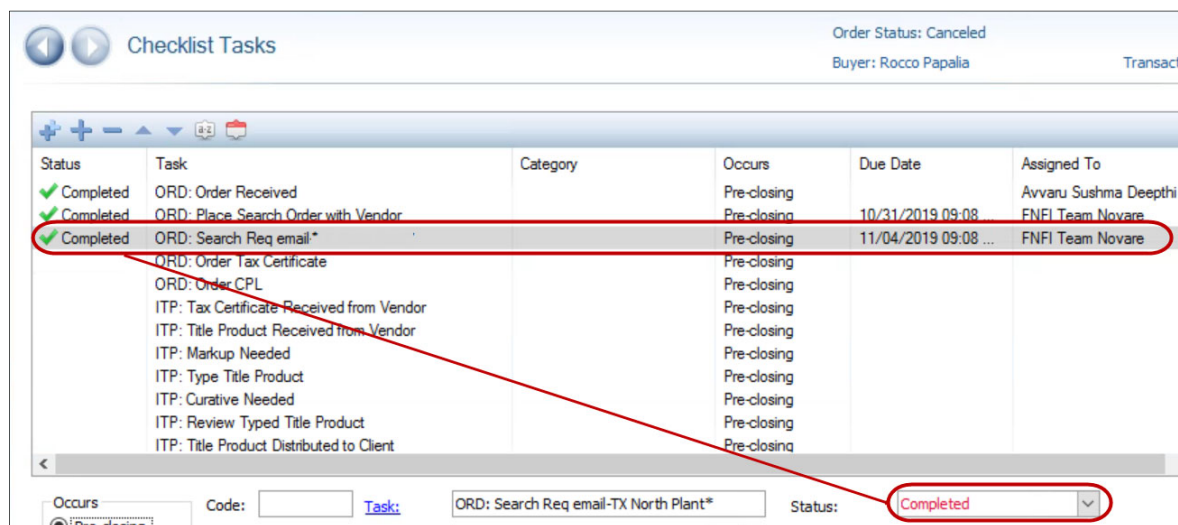
Once you receive the confirmation number,

1. Repeat **Steps 4-10** above

Using Automation to Submit

1. Click the **Checklist Tasks** button
2. Highlight the applicable task,
 - > **ORD: Search Req email ***
 - Or-
 - > **CA CPF Submission**
3. From the **Status** drop-down, select **Completed**

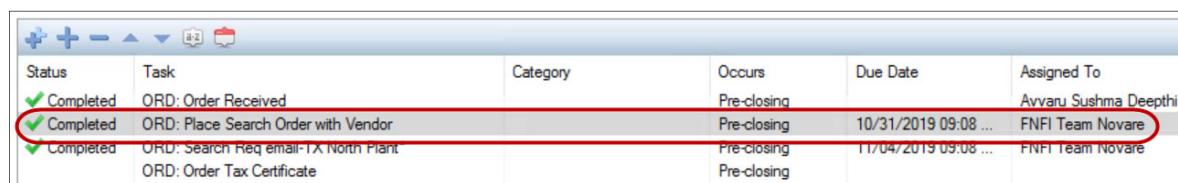
Opening through Submitting the Search Request



Status	Task	Category	Occurs	Due Date	Assigned To
Completed	ORD: Order Received		Pre-closing		Avvaru Sushma Deepthi
Completed	ORD: Place Search Order with Vendor		Pre-closing	10/31/2019 09:08	FNFI Team Novare
Completed	ORD: Search Req email *		Pre-closing	11/04/2019 09:08	FNFI Team Novare
	ORD: Order Tax Certificate		Pre-closing		
	ORD: Order CPL		Pre-closing		
	ITP: Tax Certificate Received from Vendor		Pre-closing		
	ITP: Title Product Received from Vendor		Pre-closing		
	ITP: Markup Needed		Pre-closing		
	ITP: Type Title Product		Pre-closing		
	ITP: Curative Needed		Pre-closing		
	ITP: Review Typed Title Product		Pre-closing		
	ITP: Title Product Distributed to Client		Pre-closing		

Occurs: Code: Task: Status: **Completed**

- Highlight the task, **ORD: Place Search Order with Vendor**
- From the **Status** drop-down, select **Completed**

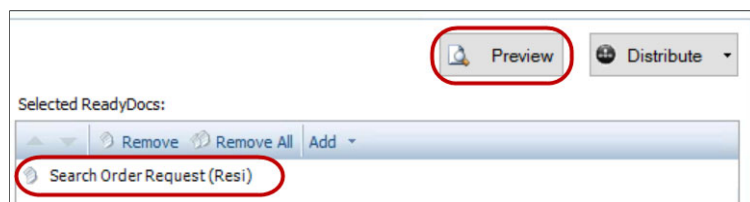


Status	Task	Category	Occurs	Due Date	Assigned To
Completed	ORD: Order Received		Pre-closing		Avvaru Sushma Deepthi
Completed	ORD: Place Search Order with Vendor		Pre-closing	10/31/2019 09:08	FNFI Team Novare
Completed	ORD: Search Req email-TX North Plant		Pre-closing	11/04/2019 09:08	FNFI Team Novare
	ORD: Order Tax Certificate		Pre-closing		

- Save and exit the order

All Other Submissions

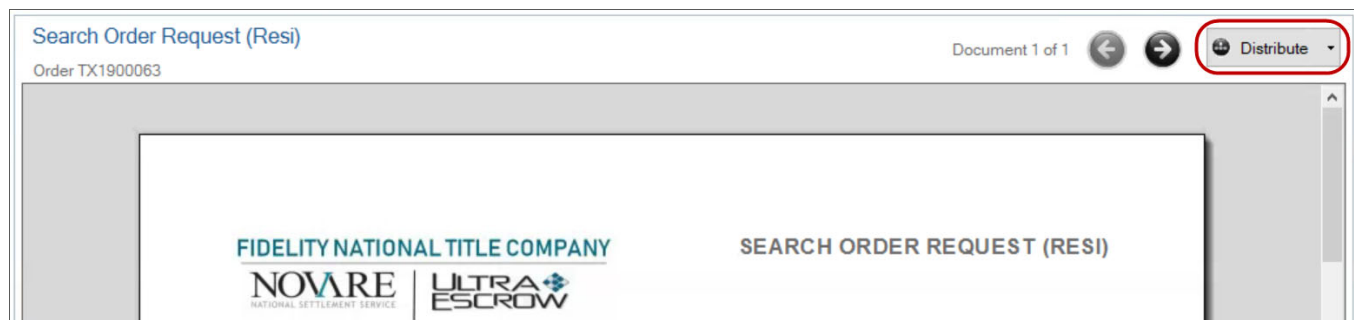
- Click the **Documents** button
- Search for and select the **Search Order Request** document
 - Search Order Request (Title Only)
 - Search Order Request (Title and Escrow)
 - Search Order Request (Resi); used for San Antonio closing office only



Selected ReadyDocs:

Remove	Remove All	Add
<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/> Search Order Request (Resi)

- Click the **Preview** button
- Click the **Distribute** button



Search Order Request (Resi)

Order TX1900063

Document 1 of 1

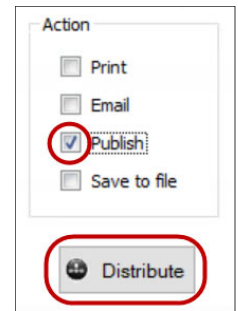
FIDELITY NATIONAL TITLE COMPANY

NOVARE **ULTRA ESCROW**

SEARCH ORDER REQUEST (RESI)

Opening through Submitting the Search Request

5. Check the **Publish** check box
6. Click **Distribute**



Action

☐ Print

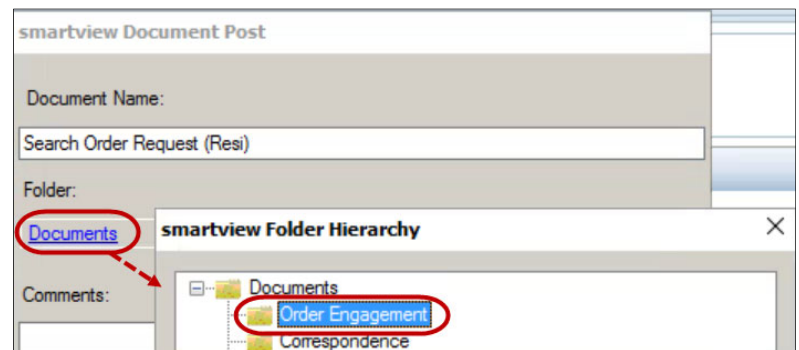
☐ Email

☒ **Publish**

☐ Save to file

Distribute

7. From the **Publish to Order** window click **OK**
8. From the **smartview Document Post** window, click the **Documents** link
9. Select the **Order Engagement** folder; this sends the document to this folder in smartVIEW
10. Click the **OK** button
11. Click the **OK** button to complete the upload



smartview Document Post

Document Name:

Search Order Request (Resi)

Folder:

Documents

Comments:

smartview Folder Hierarchy

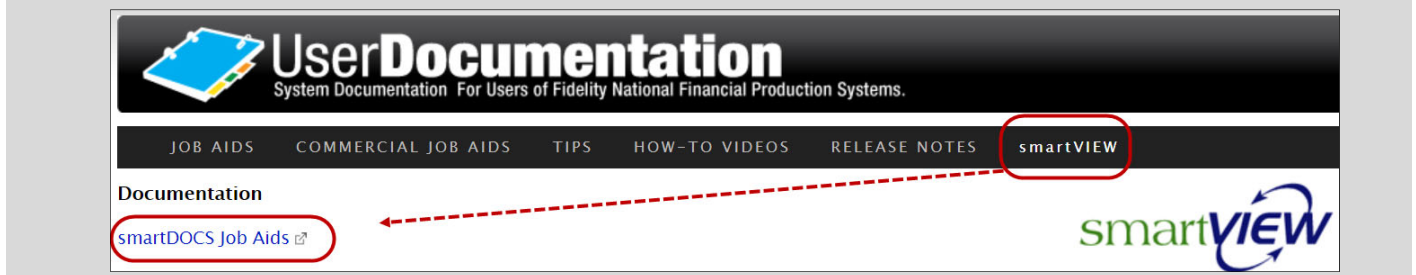
Documents

Order Engagement

Correspondence

12. From smartVIEW, email the **Search Order Request** document to the searcher/title company

NOTE: If needed, refer to the smartVIEW job aid, *Distributing Email Attachments – Employee Only* for detailed instructions. This job aid is located on **UserDocumentation > smartVIEW** page.



UserDocumentation
System Documentation For Users of Fidelity National Financial Production Systems.

JOB AIDS COMMERCIAL JOB AIDS TIPS HOW-TO VIDEOS RELEASE NOTES **smartVIEW**

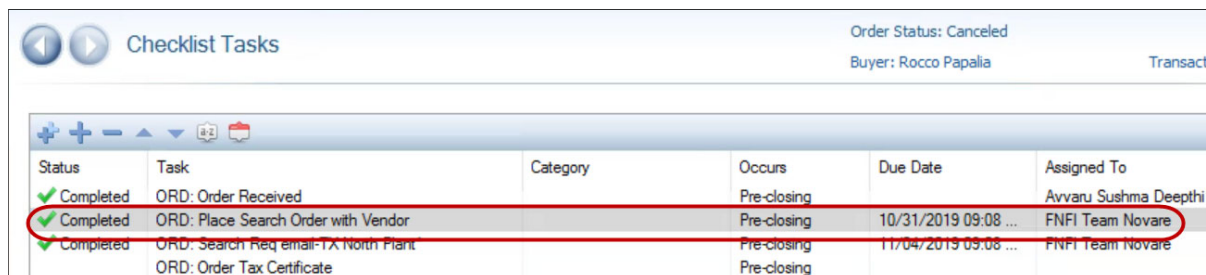
Documentation

smartDOCS Job Aids

smartVIEW

In your SoftPro Select order,

13. Click the **Checklist Tasks** button
14. Highlight the task, **ORD: Place Search Order with Vendor**
15. From the **Status** drop-down, select **Completed**



Checklist Tasks

Order Status: Canceled

Buyer: Rocco Papalia

Transact

Status	Task	Category	Occurs	Due Date	Assigned To
Completed	ORD: Order Received		Pre-closing		Avvaru Sushma Deepthi
Completed	ORD: Place Search Order with Vendor		Pre-closing	10/31/2019 09:08 ...	FNFI Team Novare
Completed	ORD: Search Req email-TX North Plant		Pre-closing	11/04/2019 05:08 ...	FNFI Team Novare
	ORD: Order Tax Certificate		Pre-closing		

16. Save and exit the order