


Escrow users: follow these steps to open an Escrow Only (ATL) order

Start Page

- ☐ Verify the **Current Profile** is correct for the underwriter requested by the client: **ATL CLT**, **ATL CTI** or **ATL FNT**; change if needed


New Order window

- ☐ Apply the appropriate template by clicking the **Search**  icon
- ☐ Select the **ATL Suffix**; (If applicable) select the **M Prefix** for multiple properties


Order Entry screen

- ☐ Verify **Order, Product, Policy, & Transaction types** (change if needed)
- ☐ (If applicable) Check the **Construction** or **Cash sale** check box
- ☐ (If applicable) Enter **Project name**
- ☐ **Settlement date/time**: enter the date from the contract
- ☐ (If applicable) Enter **Sales Price**
- ☐ **Escrow Officer/Closer**
- ☐ **Property Address**, (Enter **Zip code** to pull in the **State, Zip Code** and **County**)
- ☐ Select **Property Use**
- ☐ **Legal Description**: enter in the appropriate fields (if available)
- ☐ (If applicable) **Loan Amount** and **Lender**

Order Contacts screen

- ☐ Enter **T2-Title Company Contact**; double-click to select the (local) Office doing title work
- ☐ Contacts with placeholders (e.g.: Buyer): double-click to enter
 - > When entering the Contact who gave you the order, check the **Marketing source** check box
- ☐ Add all remaining Contacts using the **Add Contact**  icon

Register

- ☐ Receipt Earnest Money using the **Add Transaction**  icon
- ☐ If Earnest Money is to be wired, create a WMA claim by entering information in the **Anticipated Wires** window; remember to **Save** the order once the claim is created

Save & Exit

- ☐ **Save** and **Exit** the order