Checklist for Escrow Only Orders

Use the checklist to verify or select the applicable entries to open an Escrow only.

New Order window

- ❑ Apply template; use the **Search** icon to search for your template

Order Entry Screen

- ❑ **Transaction type** (change if needed)
- ❑ **Construction** or **Cash sale** checked if applicable
- ❑ **Order type** = **Title only**
- ❑ **Product type**
- ❑ **Project name**, if applicable
- ❑ **Sales price**; select new **Line** if needed

  NOTE: The description can be overwritten if needed.
- ❑ **Settlement date/time**
- ❑ **Title Officer/Examiner**
- ❑ **Title Processor Name**
- ❑ **Escrow officer/Closer**
- ❑ **Property Address**, (Enter **Zip code** to pull in the **State**, **Zip Code** and **County**)

  NOTE: If the zip code is not known, click the **City** link to pull in by city or the '**of**' link to pull in by County.
- ❑ **Principal amount of loan**; select **Line** (if needed)

Order Contacts Screen

- ❑ Enter **Office Speed Codes**; click the **Office Speed Codes** link to view available codes

  REMEMBER: Press the spacebar immediately after entering the speed code.
- ❑ **T2-Title Company** Contact: double-click to select the local office doing title work
- ❑ Enter Contacts with placeholders (e.g.: Buyer): double-click to enter

  NOTE: When entering the contact that gave you the order, check the **Marketing Source** check box and select the **Marketing Rep/House Account**
- ❑ Add all remaining Contacts using the **Add Contact** icon

Property Screen

- ❑ **Property type**
- ❑ **Property use**
- ❑ **Legal Description**: enter in the appropriate fields (if available)

Notes Screen

- ❑ Add as needed

Register

- ❑ Receipt in earnest money as needed

NOTE: If funds are to be wired in, click the Anticipated Wires button to create a WMA claim; save the order to submit to WMA.

Documents

- ❑ Preview/Print the,
  - ❑ Open Order Sheet (Order Summary) with Notes - Ltr
  - ❑ Distribution List
  - ❑ Order Confirmation
- ❑ Publish to smartview

Save & Exit

- ❑ Save and exit the order