

Use the checklist to verify or select the applicable entries to open a Title & Escrow order using your Title Plant.

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**
- ☐ **Product type**
- ☐ **Policy type**
- ☐ **Additional Description**, if applicable
- ☐ **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.

- ☐ 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**: (if available) enter in the appropriate fields

Policy Selection Screen

- ☐ Policy lookup **Code** for each policy in the grid

Title Insurance Premiums Screen

- ☐ Policy code

Endorsements Screen

- ☐ Add endorsements
 - a) Click the **Add Endorsements** button
 - b) Verify **Title product**; this is the policy you are endorsing, change if needed
 - c) Verify **Underwriter** and **State**
 - d) Check the corresponding check box for each endorsement you wish to add
 - e) Click the **OK** button

- ☐ Endorsement **Charge**

- ☐ Click the **Custom Fields** more/less bar to enter required information for each endorsement as needed

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