

Use the checklist to verify or select the applicable entries to open a Title Only 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** = Title only
- ☐ **Product type**
- ☐ **Policy type**
- ☐ **Project name**, if applicable
- ☐ **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 Office that sent you the order; verify they are identified as the **Marketing Source** and select the **Marketing Rep/House Account**
- ☐ Enter Contacts with placeholders (e.g.: Buyer): double-click to enter
- ☐ Add all remaining Contacts using the **Add Contact**  icon

### Property Screen

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

### Policy Selection Screen

- ☐ **Coverage Amount** entered for the Owner's and Loan Policies, as applicable
- ☐ **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

### 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