

Follow these steps to open orders for Maryland properties.

1. Create a new order (click the **Create** button or press **Ctrl + N**)

From the **New Order** window,

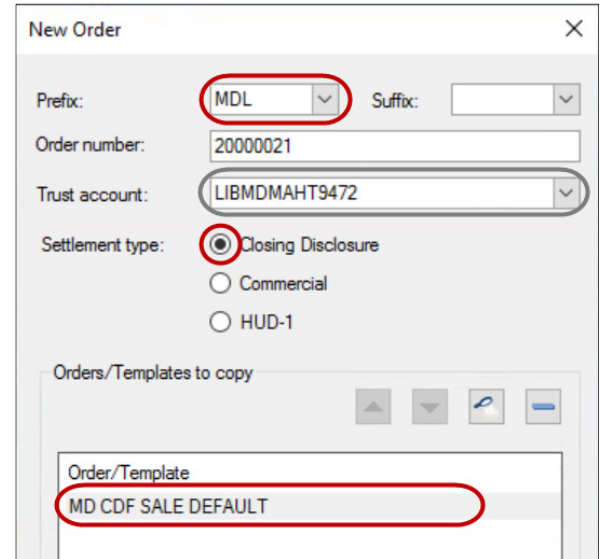
2. Select/verify the

a) **Prefix**

- > **MDC** = Chester
- > **MDE** = Edgewater
- > **MDL** = Lutherville
- > **MDM** = Millersville

- b) **Trust account** default is shown and should not require change



- c) **Settlement type** = **Closing Disclosure** or **HUD-1** depending upon your transaction

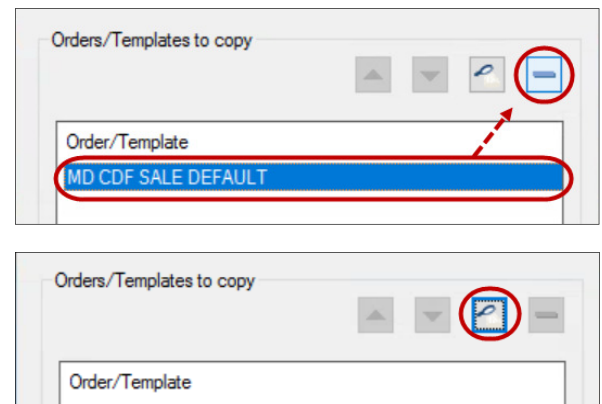


IMPORTANT: The **Settlement Type** selected must match the **Templates** applied in the next steps. If you select **HUD-1**, apply **HUD** template, if you select **Closing Disclosure**, apply **CDF** templates.

d) **Template** = **MD CDF SALE DEFAULT**

If the default template does not match your transaction,

- i. Highlight the **MD CDF SALE DEFAULT** template
- ii. Click the **Remove Template**  icon
- iii. Click the **Search**  icon to select your template(s)

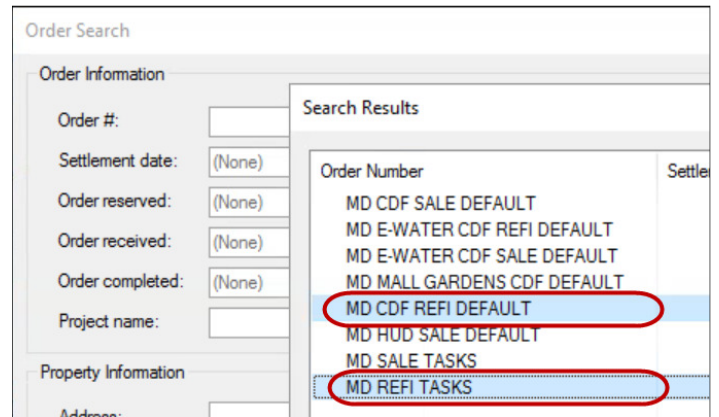


REMEMBER: Select template(s) that match the **Settlement type** selected (i.e., if **Settlement type** = **CDF** then select **MD CDF [Sale / REFI] DEFAULT** template, if **Settlement type** = **HUD-1** then select **MD HUD [Sale / REFI] DEFAULT** template.

- iv. Press the **Enter** key to bypass the **Order Search** window
- v. Highlight the applicable **DEFAULT** template; pressing the **Ctrl** key, click the **MD [Sales/REFI] Tasks** template

e) Click the **OK** button to add your templates

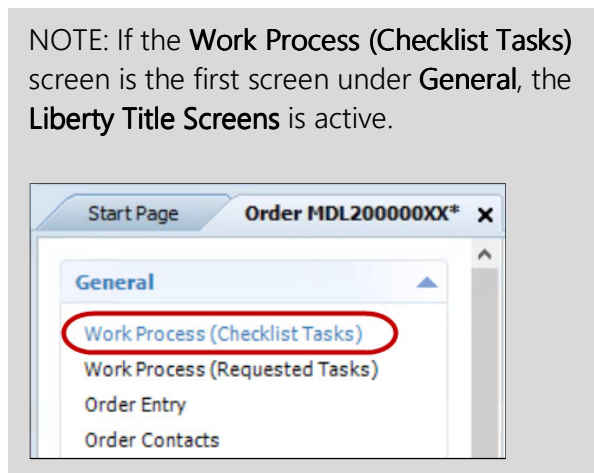
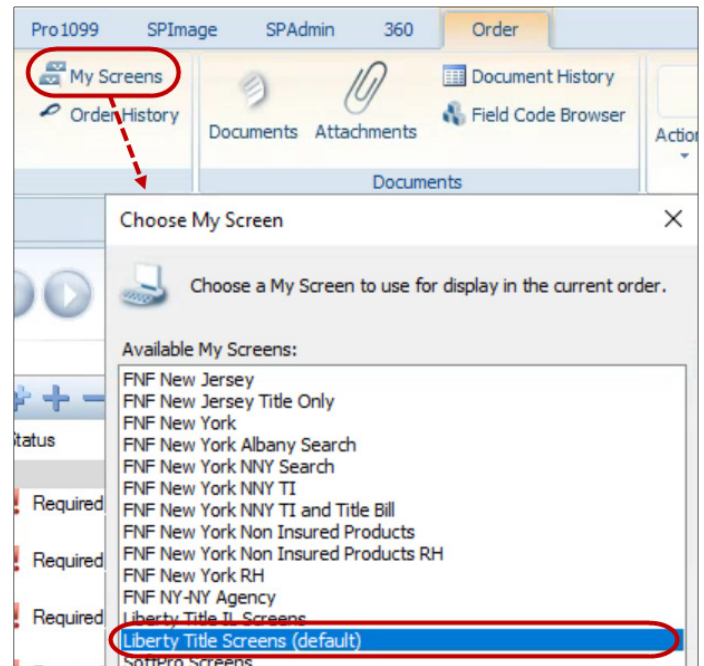
3. Click the **OK** button to generate the order number



Once your order is open,

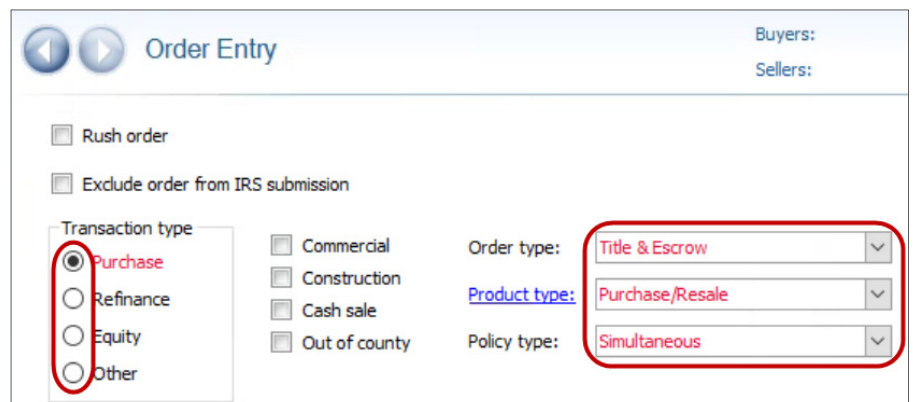
4. Verify **My Screens** = **Liberty Title Screens**
5. Click the **OK** button

NOTE: If the **Work Process (Checklist Tasks)** screen is the first screen under **General**, the **Liberty Title Screens** is active.

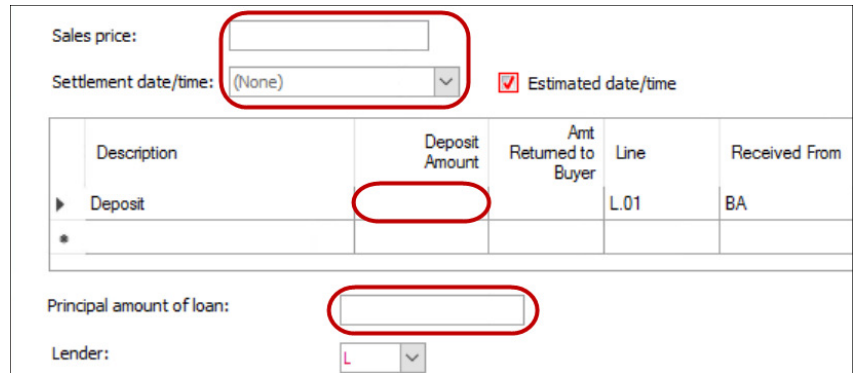
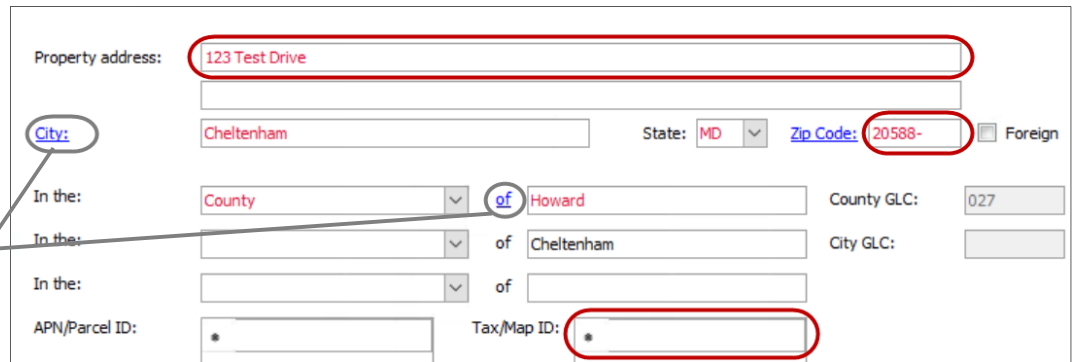
6. Navigate to the **Order Entry** screen
7. Verify the,
 - a) **Transaction type**
 - b) **Order type**
 - c) **Product type**
 - d) **Policy type**

8. Change as needed



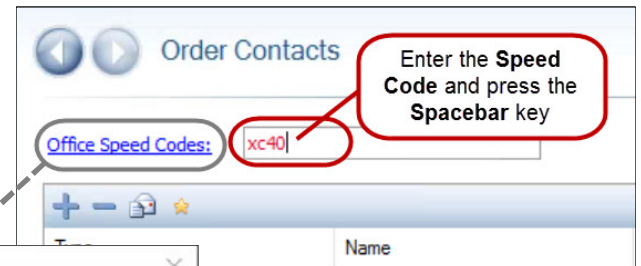
9. If known/applicable, enter the,
 - a) **Sales price**
 - b) **Settlement date/time**
10. In the **Deposit** grid, enter **Deposit Amount** if deposit is to be received later but it is to be shown on a pre-CDF/HUD-1
11. If applicable, enter **Principal amount of loan**
12. Enter the **Property address**
13. Enter the **Zip code**; press the **Tab** key

NOTE: If the zip code is not known, click the **City** or **of** link to pull from the Lookup Table.

14. Enter the **Tax/Map ID**, if known
15. Navigate to the **Order Contacts** screen
16. Enter the **Office Speed Codes**, pressing the **Spacebar** once entered

If you are unsure which code to enter, click the **Office Speed Codes** link.



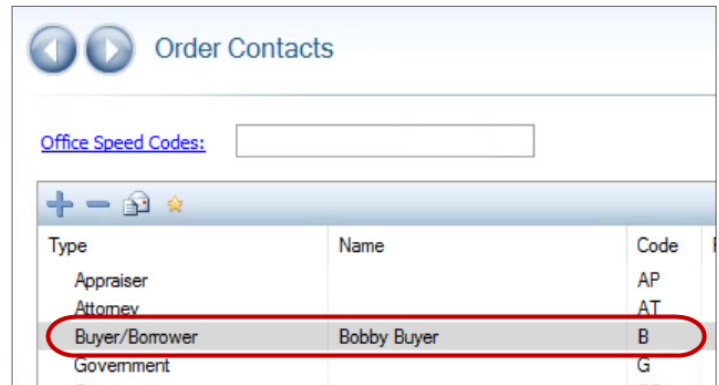
Lookup Table - P - Office Speed Codes - Liberty

Retrieve Entry Insert Entry Search: md

Found 10 matches.

Speed Code	Description	Office
xch40	A= Liberty T= Liberty U= Chicago	MD - Chester - CT
xe40	A= Liberty T= Liberty U= Chicago	MD - Edgewater - CT
xd40	A= Liberty T= Liberty U= Chicago	MD - Lutherville - CT
xm40	A= Liberty T= Liberty U= Chicago	MD - Millersville - CT
xc40	A= Liberty T= Liberty U= Chicago	MD- Canton - CT

17. Enter remaining Contacts using placeholders first; double-click the placeholder to open
Do **not** enter any **G**-Contacts; upon saving and closing the order, the automation process populates the applicable **G**-Contact.



Type	Name	Code
Appraiser		AP
Attorney		AT
Buyer/Borrower	Bobby Buyer	B
Government		G

NOTE REMEMBER:

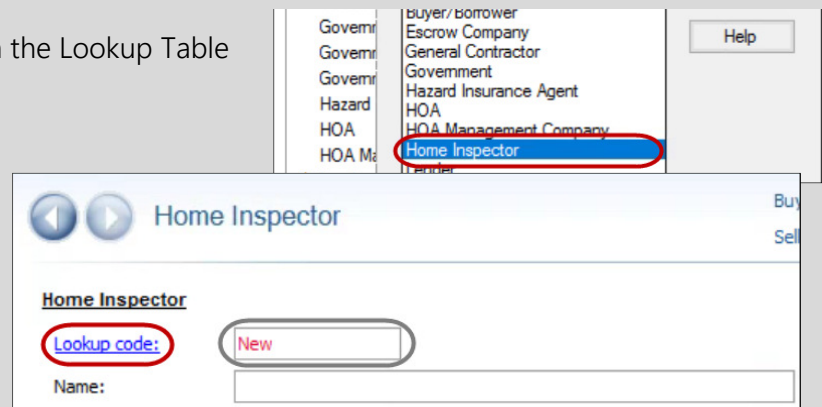
1. > The **Speed Code** selected should only be for Maryland offices (**Office** name begins with "MD-")
2. > If you entered the wrong speed code, clear the field using the **F2** key and enter the correct code pressing the **Spacebar** key to run
- 3.

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

5. If the Contact does not exist, in the Lookup code field enter,

- > **New** if you wish to have the Contact added to the lookup table for future use
- > **One** if the Contact is only to be used for the current order

Enter as much contact information as possible (i.e., address, phone number).



Home Inspector

Lookup code: New

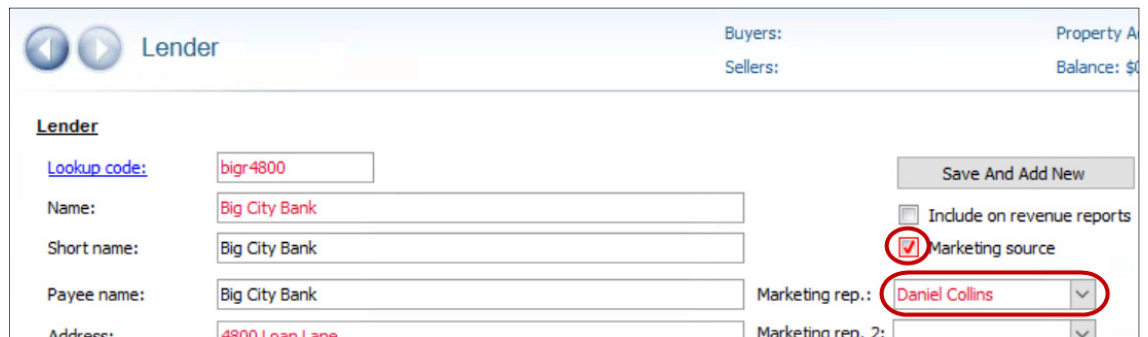
Name:

Dropdown menu items: Government, Buyer/Borrower, Escrow Company, General Contractor, Government, Hazard Insurance Agent, HOA, HOA Management Company, Home Inspector, HOA Manager, Lender.

18. Double-click the Contact who gave you the order

19. Check the **Marketing source** check box

20. From the **Marketing rep** drop-down, select the internal sales representative



Lender

Buyers: Property Address:

Sellers: Balance: \$

Lookup code:

Name:

Short name:

Payee name:

Address:

Marketing rep.: Daniel Collins


Marketing rep. 2:

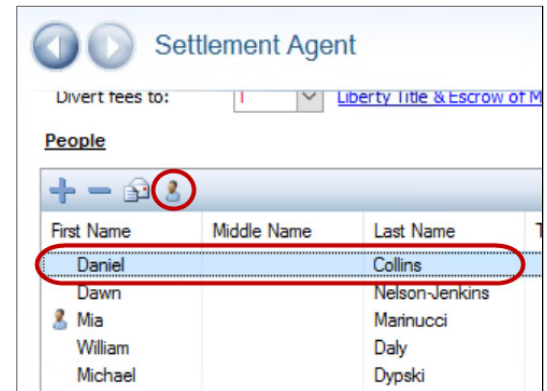
Save And Add New

☐ Include on revenue reports

☒ Marketing source

21. Press **Esc** key to return to the **Order Contacts** screen
22. Double-click the **Settlement Agent** Contact

23. In the **People** grid, highlight the name of the **Marketing rep** selected in **Step 20**; if the **Marketing rep** is not shown, skip to **Step 25**
24. Click the **Set as Main Contact**  icon; the icon then shows next to the main contact and their name flows to **CDF Pg5**
25. Save your order



Settlement Agent

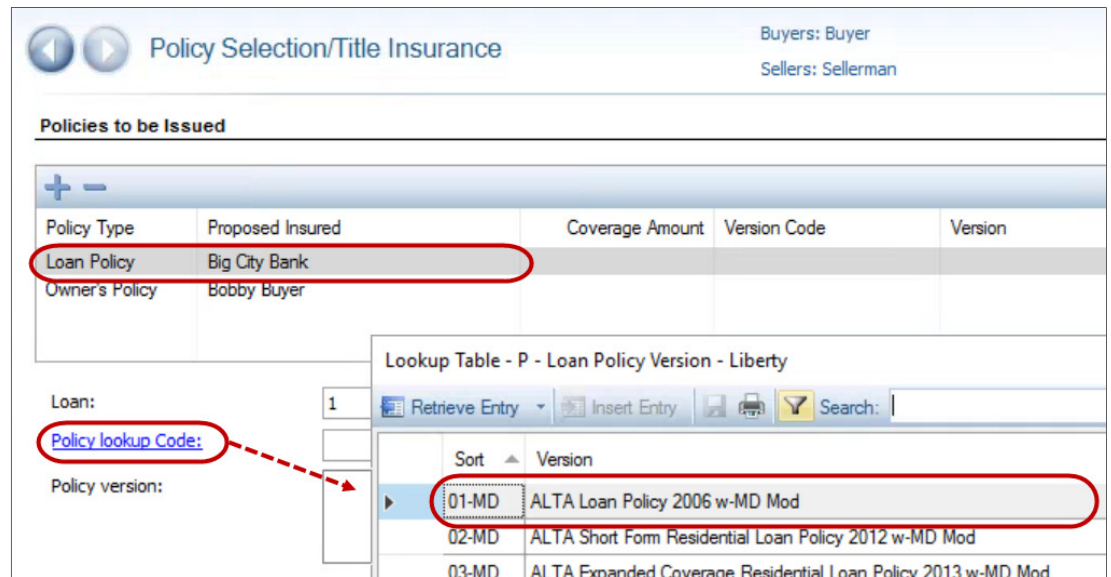
Divert fees to: Liberty Title & Escrow of M

People

First Name	Middle Name	Last Name
Daniel		Collins
Dawn		Nelson-Jenkins
Mia		Marinucci
William		Daly
Michael		Dypski

If policy information is **not** provided (or you are unsure which policy to select), skip to **Step 30**, otherwise continue on to next steps.

26. Navigate to the **Policy Selection/Title Insurance** screen
27. Highlight the policy in the grid
28. Click the **Policy lookup Code** link
29. Double-click to select the applicable policy



Policy Selection/Title Insurance

Buyers: Buyer
Sellers: Sellerman

Policies to be Issued

Policy Type	Proposed Insured	Coverage Amount	Version Code	Version
Loan Policy	Big City Bank			
Owner's Policy	Bobby Buyer			

Loan: 1

Policy lookup Code:

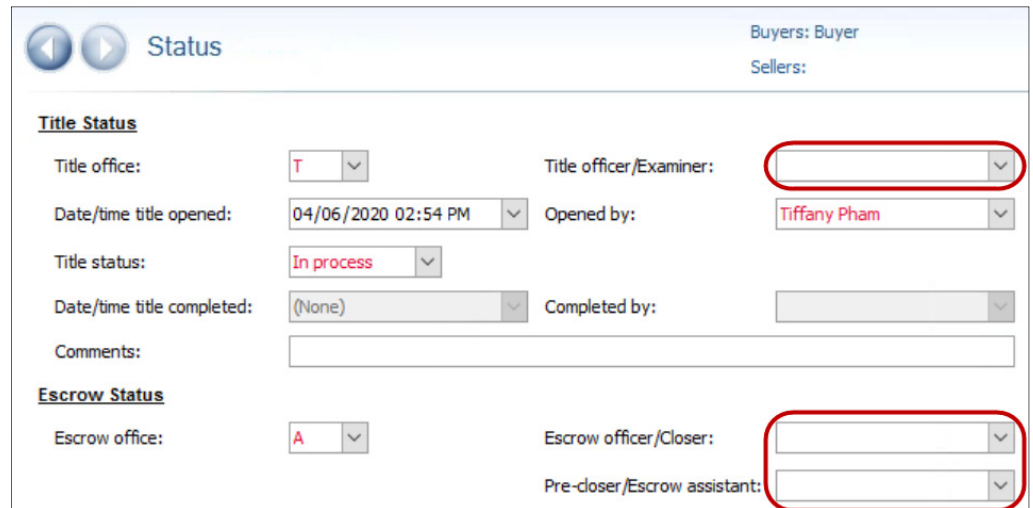
Policy version:

Lookup Table - P - Loan Policy Version - Liberty

Retrieve Entry Insert Entry Search:

Sort	Version
01-MD	ALTA Loan Policy 2006 w-MD Mod
02-MD	ALTA Short Form Residential Loan Policy 2012 w-MD Mod
03-MD	ALTA Expanded Coverage Residential Loan Policy 2013 w-MD Mod

30. Navigate to the **Status** screen
31. Enter/select the,
 - a) **Title officer/Examiner** = your settlement officer
 - b) **Escrow officer/Closer** = your processor
 - c) **Pre-closer/Escrow assistant** = post closer



Status

Buyers: Buyer
Sellers:

Title Status

Title office: T

Date/time title opened: 04/06/2020 02:54 PM

Title status: In process

Date/time title completed: (None)

Comments:

Escrow Status

Escrow office: A

Title officer/Examiner:

Opened by: Tiffany Pham

Completed by:

Escrow officer/Closer:

Pre-closer/Escrow assistant:

32. Save your order
33. Add any corresponding documents and emails to smartVIEW