

## Adding Entries on Escrow Only Orders

Follow these steps to properly enter information in your Escrow Only order for the revenue sharing entries with or without NBU.

### Order Entry Screen

1. If the order is an In-Family Title with NBU click the **Additional Description** link
2. Double-click the **NBU** entry

Additional Description:

NBU

### Order Contacts Screen

1. Verify/enter your contacts as usual
2. Enter the applicable speed code – click the **Office Speed Codes** link to view a list of available codes
  - › Out of state properties
    - » enter an Out of State speed code; these codes start with “xoos” in the **Lookup Table**
    - » is based on the property County
    - » populates the **Settlement Agent** Contact only; presumes Title is out of state

Order Contacts

Office Speed Codes: xoosla

Type	Name	Code
Appraiser		
Attorney (L)		
Attorney (SA)		
★ Attorney (BA)		
Buyer/Borrower		
Government		
Government		
Lender		
Listing Agent/Broker		
Other		
Other (MRKREP)		
Other		
Other (Third Party)		
Other (Third Party)		
Other		
Other (Notary - External)		

**Lookup Table - CR - Office Speed Codes - NCS.CA.CT**

Retrieve Entry
Insert Entry

Code	Description
xct100	Rancho Cucamongal A/A2 - CTNC-100, T - CTNC-676
xct138	New Communities A/A2 - CTNC-138, T - CTNC-674
xct356	Fin District A/A2 - CTNC-356, T - CTNC-356
xct606	Title Only Bay Area A/A2/T - CTNC-606
xct658	Nat1 Projects A/A2 - CTNC-658, T - CTNC-658
xct663	Carlsbad A/A2 - CTNC-663, T - CTNC-682
xct673	Special Projects (Jasen) A/A2 - CTNC-673, T - CTNC-673
xct674	Title Only LA A/A2/T - CTNC-674
xct675	LA A/A2 - CTNC-675, T - CTNC-674
xct675nb	LA A/A2 - CTNC-675, Newport Beach T - CTNC-676
xct676	Title Only Orange A/A2/T - CTNC-676
xct677	Orange A/A2 - CTNC-677, T - CTNC-676
xct682	Title Only San Diego A/A2/T - CTNC-682
xct683	San Diego A/A2 - CTNC-683, T - CTNC-682
xct683nb	San Diego A/A2 - CTNC-683, Newport Beach T - CTNC-676
xct725	Long Beach A/A2 - CTNC-725, T - CTNC-676
xct740	Walnut Creek A/A2 - CTNC-740, T - CTNC-740
xct982	San Jose A/A2 - CTNC-982, T - CTNC-982
xooscc	Contra Costa County Out of State A/A2 - CTNC-2665
xoosla	LA County Out of State A/A2 - CTNC-5675
xoosoc	Orange County Out of State A/A2 - CTNC-2676
xoossc	Santa Clara County Out of State A/A2 - CTNC-2682
xoossd	San Diego County Out of State A/A2 - CTNC-113
xoossf	San Fran County Out of State A/A2 - CTNC-2660

**NOTE:** If a property is located in a state you are not licensed to do business in, use of the speed code does **not** populate the A-, A2-Contacts.

## Adding Entries on Escrow Only Orders

3. **T-Title Company** Contact; out of state title is always entered as the **T-Contact**
4. **T2-Title Company** Contact
  - › if an NBU order, enter **CTNC-658**, **CTNC-673** or **CTNC-676**
  - › If not an NBU – leave blank

Settlement Agent	Chicago Title Insurance Company	A
Settlement Agent	Chicago Title Insurance Company	A2
Surveyor		SU
Title Company	Fidelity National Title - Brentwood	T
Title Company		T2
Underwriter	Chicago Title Insurance Company	U

**Title Company**  
 Lookup code:  
 Name:  
 Short name:  
 Payee name:  
 Address:  
 Email address:  
 Signature line:

**Lookup Table - C - Title Company - NCS.CA.CT**  
 Retrieve Entry   Insert Entry   Search:  

LookupCode	Nickname
CTNC-108	CTC LA Title Energy
CTNC-356	CTC FINANCIAL DISTRICT COMME...
CTNC-606	CTC BAY AREA NCS TITLE ONLY
CTNC-658	CTC NATL PROJECTS GROUP
CTNC-673	CTC CALIFORNIA C AND I SALES
CTNC-674	CTC SO CAL C AND I TTL LA
CTNC-676	CTC SO CAL C AND I TTL ORANGE
CTNC-682	CTC SO CAL C AND I TTL SAN DIE...
CTNC-740	CTC CA NCS WALNUT CREEK

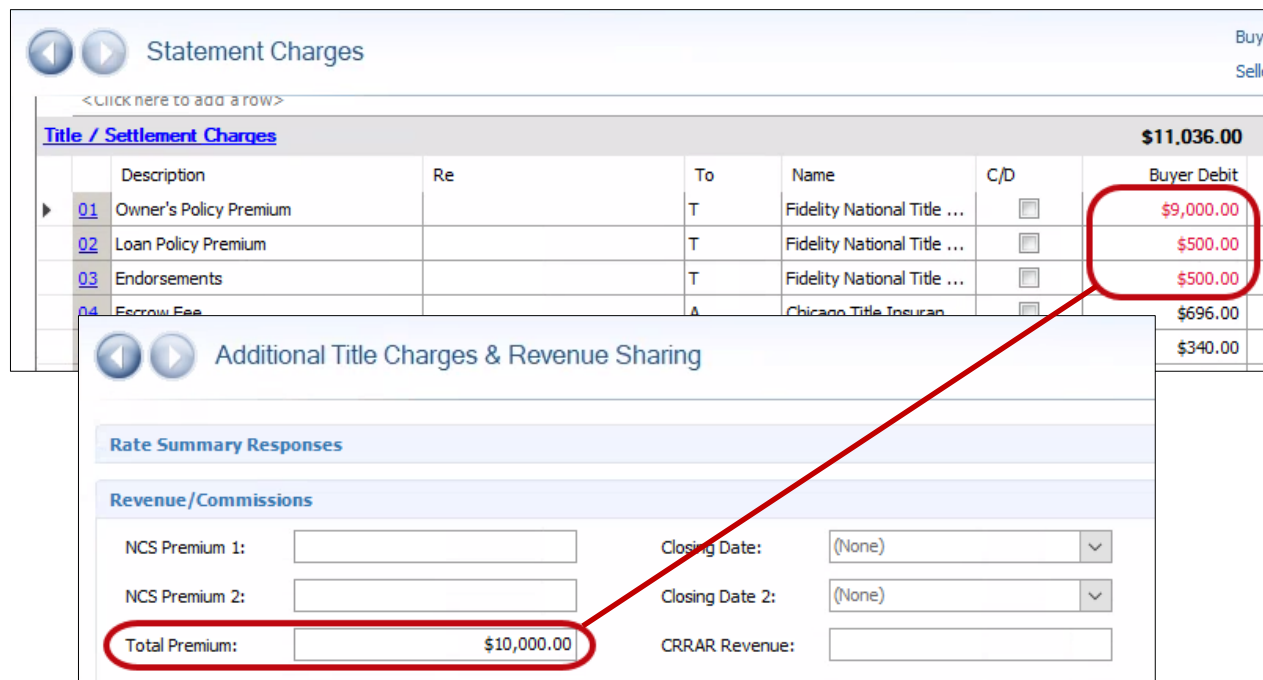
### Contact Speed Code Reference

- › **NBU – inside escrow** (Kris' team) run the **CTIC NATL PROJECT GROUP** speed code
  - » **A-Settlement Agent** Contact = 658
  - » **T2-Title Company** Contact = NBU Fee; confirm it is the correct NBU Team, if not correct
  - » **T-Title Company** Contact = outside Title Company writing paper/policy
- › **LA Out of State** – run the out of state speed code
  - » **A-Settlement Agent** Contact = 5675
  - » **T-Title Company** Contact = outside title company writing paper/policy
  - » **ADD: T2-Title Company** Contact; if NBU involved, add NBU Team, otherwise leave as 5675
- › **NBU – inside escrow** (for all other LA Escrow Teams)
  - » **A-Settlement Agent** Contact = 675
  - » **T2-Title Company** Contact = NBU Fee
  - » **T-Title Company** Contact = outside Title Company writing paper/policy
- › **NBU Units** – always T2
  - » **Janson** = 673
  - » **Watson** = 658
  - » **James** = 676

### Statement Charges Screen

In the **Title / Settlement Charges** section,

1. Enter policy premium amounts using the placeholders; this ensures the total amount pulls to the **Additional Title Charges & Revenue Sharing** screen and calculations are done for you



**Statement Charges**

< Click here to add a row >

Title / Settlement Charges							\$11,036.00
	Description	Re	To	Name	C/D		Buyer Debit
01	Owner's Policy Premium		T	Fidelity National Title ...			\$9,000.00
02	Loan Policy Premium		T	Fidelity National Title ...			\$500.00
03	Endorsements		T	Fidelity National Title ...			\$500.00
04	Escrow Fee		A	Chicago Title Insuran			\$696.00
							\$340.00

**Additional Title Charges & Revenue Sharing**

**Rate Summary Responses**

**Revenue/Commissions**

NCS Premium 1:  Closing Date: (None)

NCS Premium 2:  Closing Date 2: (None)

**Total Premium:**  \$10,000.00  CRRAR Revenue:

### Additional Title Charges & Revenue Sharing Screen

Follow the steps in the applicable section:

- > [In Family Title without NBU](#)
- > [In Family Title with NBU](#)
- > [Agency Title without NBU](#)
- > [Agency Title with NBU](#)

### Exception Properties: Orders with Property(ies) Located in IL/NM/TX/VA

Follow these steps if your transaction is for a property located in the states of Illinois, New Mexico, Texas or contains multiple properties with one in Virginia.

If notified the revenue share or service fee is,

- > being sent via wire, create an **Anticipated Wire** from the T-Contact sending the funds
- > received by OAC as an inter-company credit, OAC notifies you when the Miscellaneous Credit has been posted



Once the funds are posted to the **Register** (either by incoming wire or miscellaneous credit),

1. Follow the steps in the applicable section: [Agency Title without NBU](#) or [Agency Title with NBU](#)
2. Navigate to the **Register** and post the Fee Ledger to collect your income

### Helpful hints for Impact Users

- › In Family Direct Operation Title Company Orders use the following three revenue sharing placeholders:  
This is the scenario where you would have used the **6048/6649** Transaction codes in Impact.
  - » Revenue Sharing Income Net (Gr Prem) | Bill Code: NBING – 6048 (don't include numbers)
  - » Revenue Sharing Income Net (Issue Office Share) | Bill Code: NBINI – 6148
  - » Revenue Sharing Expense (In Family) | Bill Code: NBE – 6649
- › Agency Title Company Orders use the following three revenue sharing placeholders:  
This is the scenario where you would have used the **6837/6632** Transaction codes in Impact for the outside Agent.
  - » Service Fee Received - Agent Net (Gr Prem) | Bill Code: ABING – 6037
  - » Service Fee Received - Agent Net (Agent Share) | Bill Code: ABINI – 6137
  - » Service Fee Paid - Agent | Bill Code: ABE – 6838

The total amount of all premiums and endorsements populates the **Total Premium** field at the top of the screen in the **Revenue/Commissions** section. This is used in later steps to calculate the splits.

Additional Title Charges & Revenue Sharing

Rate Summary Responses

Revenue/Commissions

NCS Premium 1:	<input type="text"/>	Closing Date:	<input type="text" value="(None)"/>
NCS Premium 2:	<input type="text"/>	Closing Date 2:	<input type="text" value="(None)"/>
<b>Total Premium:</b>	<input type="text" value="\$10,000.00"/>	CRRAR Revenue:	<input type="text"/>

- › In Family Title **without** NBU

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1. Highlight the **Revenue Sharing Income Net (GR Prem)** placeholder entry in the grid
2. In the **Maximum charge** field, enter the amount populated to the **Total Premium** field

The system calculates the splits based on the standard splits for your operation for the,

- » **Revenue Sharing Income Net (Issue Office Share)** – amount to the Outside In Family Title receives
- » **Revenue Sharing Expense (In Family)** – amount your office receives

### Revenue/Commissions

NCS Premium 1:		Closing Date:	(None)
NCS Premium 2:		Closing Date 2:	(None)
<b>Total Premium:</b>	<b>\$10,000.00</b>	CRRAR Revenue:	
Gross Revenue:		Work Share Fee:	

Description	Charge	Issued Date	Effective Date
Escrow Fee	\$696.00		
FTB Processing Fee			
Exchange Escrow Processing - Buyer			
Exchange Escrow Processing - Seller			
Concurrent Loan Services Fee	\$340.00		
Concurrent Loan Services Fee (2nd)			
Recording Service fee			
FedEx Fee			
<b>Revenue Sharing Income Net (Gr Prem)</b>	<b>\$10,000.00</b>		
Revenue Sharing Income Net (Issue Office Share)	(\$5,600.00)		
Revenue Sharing Expense (In Family)	(\$4,400.00)		

Policy:

Coverage amount:

Description:

Revenue Sharing Income Net (Gr Prem)

Transaction code:

Issued date:

(None)

Effective date:

(None)

Calculate Charge

Minimum charge:

Maximum charge:

**\$10,000.00**

Charge based on:

Amount:

Multiplication %:

Calculate charge

Adjustment:

+/-

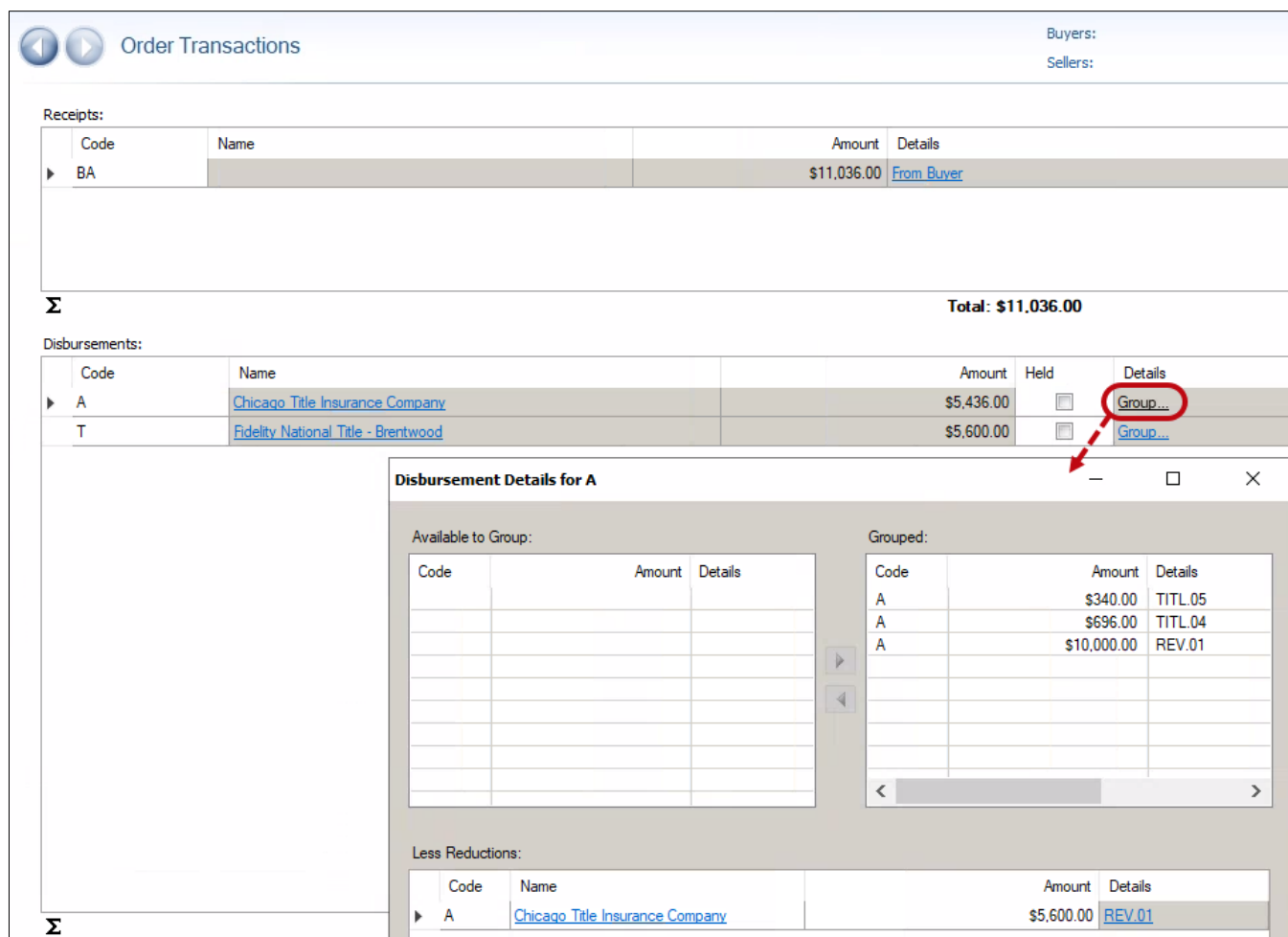
Seller pay:

**NOTE:** If the Revenue Sharing entries require an adjustment,

1. Highlight the **Revenue Sharing Income Net (Issue Office Share)** placeholder in the grid
2. Enter the applicable percentage in the **Multiplication %** field
3. Repeat **step 2** for the **Revenue Sharing Expense (In Family)** entry

3. Navigate to the **Order Transactions** screen
4. Verify the amounts (without having to go to the Register)
5. Click the **Group** links to view the split amounts for the **A-** (Escrow branch) and **T-** Contact (Outside In-Family Title)

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**Order Transactions**

Buyers: \_\_\_\_\_  
Sellers: \_\_\_\_\_

**Receipts:**

Code	Name	Amount	Details
BA		\$11,036.00	From Buyer

**Σ** **Total: \$11,036.00**

**Disbursements:**

Code	Name	Amount	Held	Details
A	Chicago Title Insurance Company	\$5,436.00	<input type="checkbox"/>	Group...
T	Fidelity National Title - Brentwood	\$5,600.00	<input type="checkbox"/>	Group...

**Disbursement Details for A**

Available to Group:

Code	Amount	Details

Grouped:

Code	Amount	Details
A	\$340.00	TITL.05
A	\$696.00	TITL.04
A	\$10,000.00	REV.01

Less Reductions:

Code	Name	Amount	Details
A	Chicago Title Insurance Company	\$5,600.00	REV.01

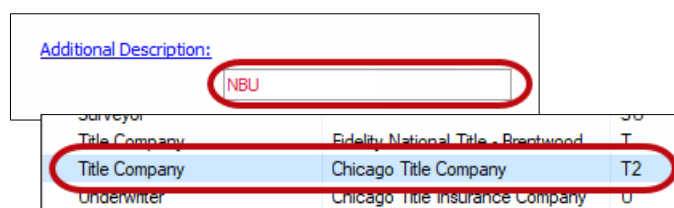
**Σ**

6. If adjustments are needed, return to the **Additional Title Charges & Revenue Sharing** screen

› In Family Title **with** NBU

Before proceeding,

1. Navigate to the **Order Entry** screen
2. Verify the,
  - a. **Additional Description** field = **NBU**
  - b. **T2-Contact** = applicable NBU Branch



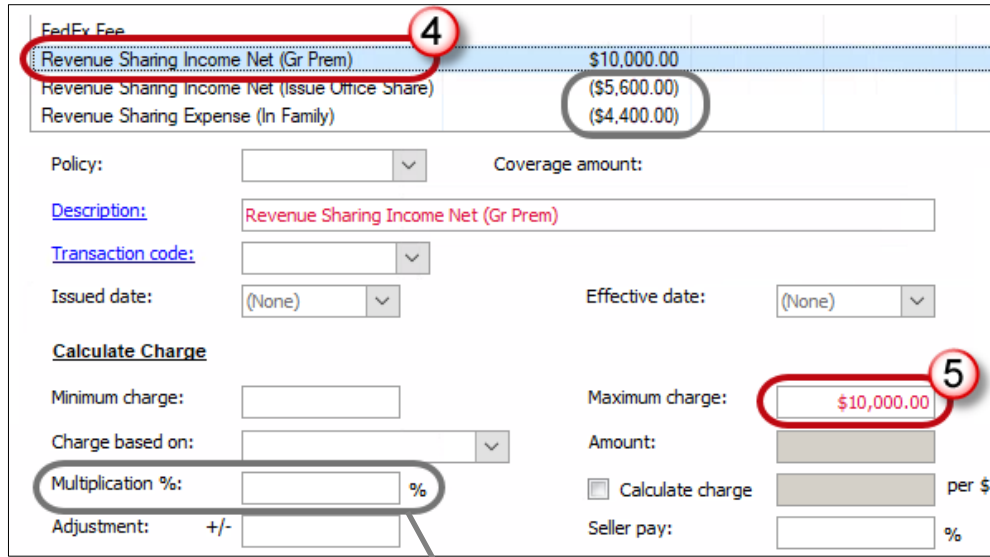
**Additional Description:** NBU

Surveyor	Title Company	Underwriter
Fidelity National Title - Brentwood	Chicago Title Company	T2
Chicago Title Insurance Company		

3. Navigate to the **Additional Title Charges & Revenue Sharing** screen
  4. Highlight the **Revenue Sharing Income Net (GR Prem)** placeholder entry in the grid
  5. In the **Maximum charge** field, enter the amount populated to the **Total Premium** field
- The system calculates the splits based on the standard splits for your operation for the,

## Adding Entries on Escrow Only Orders

- » **Revenue Sharing Income Net (Issue Office Share)** – amount to the Outside In Family Title receives
- » **Revenue Sharing Expense (In Family)** – amount your office receives



**Revenue Sharing Income Net (Gr Prem)** \$10,000.00

**Revenue Sharing Income Net (Issue Office Share)** (\$5,600.00)

**Revenue Sharing Expense (In Family)** (\$4,400.00)

Policy:  Coverage amount:

Description:

Transaction code:

Issued date:  Effective date:

**Calculate Charge**

Minimum charge:  Maximum charge:

Charge based on:

Multiplication %:  %

Adjustment: +/-

☐ Calculate charge  per \$

Seller pay:  %

**NOTE:** If the revenue sharing entries require an adjustment,

1. Highlight the **Revenue Sharing Income Net (Issue Office Share)** placeholder in the grid
2. Enter the applicable percentage in the **Multiplication %** field
3. Repeat **step 2** for the **Revenue Sharing Expense (In Family)** entry

3. Navigate to the **Order Transactions** screen
4. Verify the amounts (without having to go to the Register)
5. Click the **Group** links to view the split amounts for the **A-** (Escrow branch), **T-Contact** (Outside In-Family Title), and **T2-Contact** (NBU)

Receipts:

Code	Name	Amount	Details
▶ BA		\$11,036.00	From Buyer
Σ			Total: \$11,036.00

Disbursements:

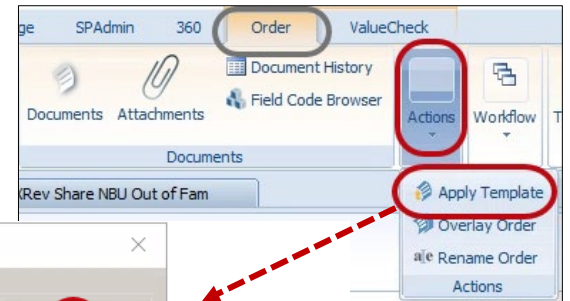
Code	Name	Amount	Held	Details
▶ T2	<a href="#">Chicago Title Company</a>	\$4,400.00	<input type="checkbox"/>	<a href="#">Group...</a>
A	<a href="#">Chicago Title Insurance Company</a>	\$1,036.00	<input type="checkbox"/>	<a href="#">Group...</a>
T	<a href="#">Fidelity National Title - Brentwood</a>	\$5,600.00	<input type="checkbox"/>	<a href="#">Group...</a>

6. If adjustments are needed, return to the **Additional Title Charges & Revenue Sharing** screen

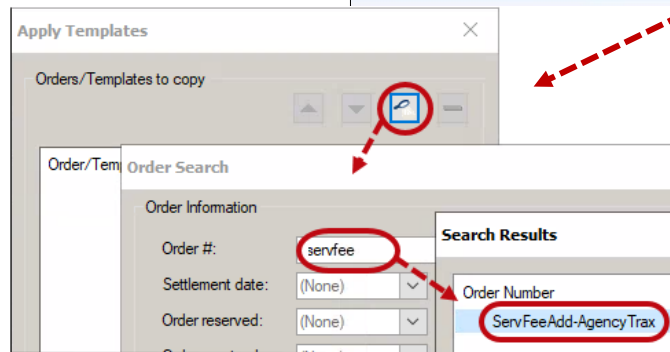


## Adding Entries on Escrow Only Orders

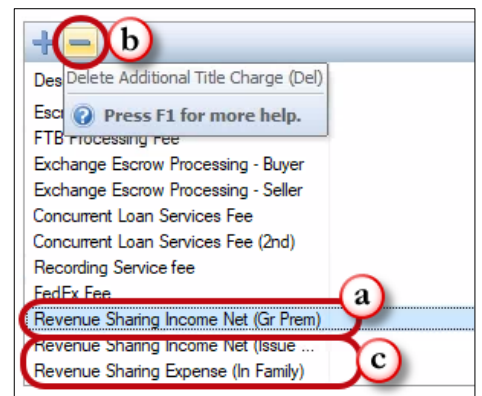
- › Agency Title **without** NBU
1. From the **Order** ribbon, click the **Actions** drop-down, select **Apply Template**
2. Apply the **ServFeeAdd-Agency Trax** template



**HINT:** When searching for your template, enter **servfee** in the **Order #** field to limit your search results.



3. Navigate to the **Additional Title Charges & Revenue Sharing** screen
4. Delete the Revenue Sharing entries
  - a. Highlight the **Revenue Sharing Income Net (GR Prem)** placeholder entry in the grid
  - b. Click the **Delete Additional Title Charge** icon; click **Yes** to confirm deletion
  - c. Repeat **steps a-b** for each additional **Revenue Sharing** entry in the grid



5. Highlight the **Service Fee Received – Agent Net (Gr Prem)** placeholder entry in the grid
6. In the **Maximum charge** field, enter the amount populated to the **Total Premium** field

Service Fee Paid - Agent			
Service Fee Received - Agent Net (Agent Share)			
<b>Service Fee Received - Agent Net (Gr Prem)</b>		\$10,000.00	

Policy:  Coverage amount:

Description:

Transaction code:

Issued date:  Effective date:

**Calculate Charge**

Minimum charge:  Maximum charge:



## Adding Entries on Escrow Only Orders

7. Highlight the **Service Fee Received – Agent Net (Agent Share)** entry in the grid
8. In the **Multiplication %** field, enter the percent share the Out of Family Outside Title receives

Service Fee Paid - Agent		
Service Fee Received - Agent Net (Agent Share)		(\$2,500.00)
Service Fee Received - Agent Net (Gr Prem)		\$10,000.00

Policy:  Coverage amount:

Description:

Transaction code:

Issued date:

**Calculate Charge**

Minimum charge:

Charge based on:

Multiplication %:

Adjustment: +/-

Charge:

FedEx Fee		
Service Fee Paid - Agent		
Service Fee Received - Agent Net (Agent Share)		
Service Fee Received - Agent Net (Gr Prem)		

Policy:  Coverage:

Description:

Transaction code:

Issued date:

**Calculate Charge**

Minimum charge:

Charge based on:

Multiplication %:

Adjustment: +/-

Charge:

9. Highlight the **Service Fee Paid - Agent** entry in the grid
10. In the **Multiplication %** field, enter the percent share your Escrow Office receives
11. Navigate to the **Order Transactions** screen
12. Verify the amounts (without having to go to the Register)
13. Click the **Group** links to view the split amounts for the **A-** (Escrow branch) and **T-** Contact (Outside Out of Family Title)

Receipts:

Code	Name	Amount	Details
▶ BA		\$11,036.00	From Buyer
Σ		Total: \$11,036.00	

Disbursements:

Code	Name	Amount	Held	Details
▶ A	Chicago Title Insurance Company	\$8,536.00	<input type="checkbox"/>	Group...
T	Delta Title Corp.	\$2,500.00	<input type="checkbox"/>	Group...

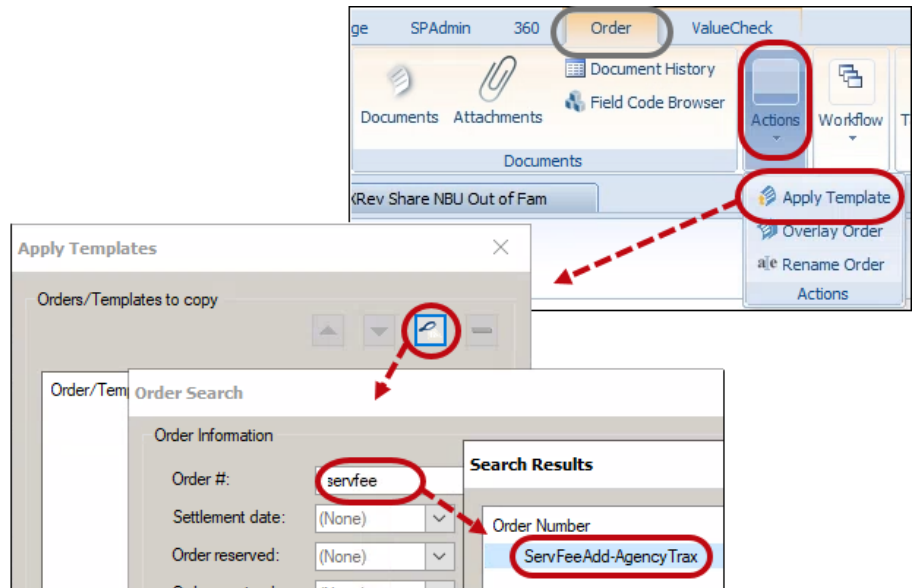
14. If adjustments are needed, return to the **Additional Title Charges & Revenue Sharing** screen

## Adding Entries on Escrow Only Orders

› Agency Title **with** NBU

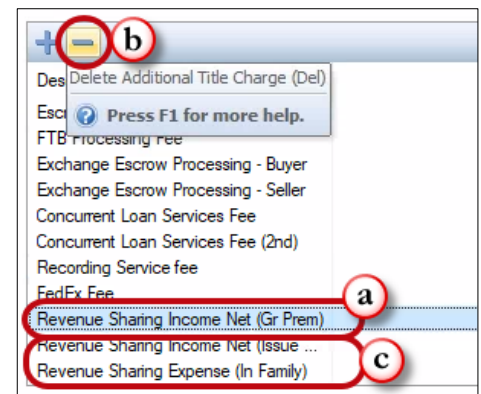
1. From the **Order** ribbon, click the **Actions** drop-down, select **Apply Template**
2. Apply the **ServFeeAdd-Agency Trax** template

**HINT:** When searching for your template, enter **servfee** in the **Order #** field to limit your search results.



3. Navigate to the **Additional Title Charges & Revenue Sharing** screen
4. Delete the Revenue Sharing entries

- a. Highlight the **Revenue Sharing Income Net (Gr Prem)** placeholder entry in the grid
- b. Click the **Delete Additional Title Charge** icon; click **Yes** to confirm deletion
- c. Repeat **steps a-b** for each additional **Revenue Sharing** entry in the grid



5. Highlight the **Service Fee Received – Agent Net (Gr Prem)** placeholder entry in the grid
6. In the **Maximum charge** field, enter the amount populated to the **Total Premium** field

Service Fee Paid - Agent			
Service Fee Received - Agent Net (Agent Share)			
Service Fee Received - Agent Net (Gr Prem)	\$10,000.00		

Policy:  Coverage amount:

Description:

Transaction code:

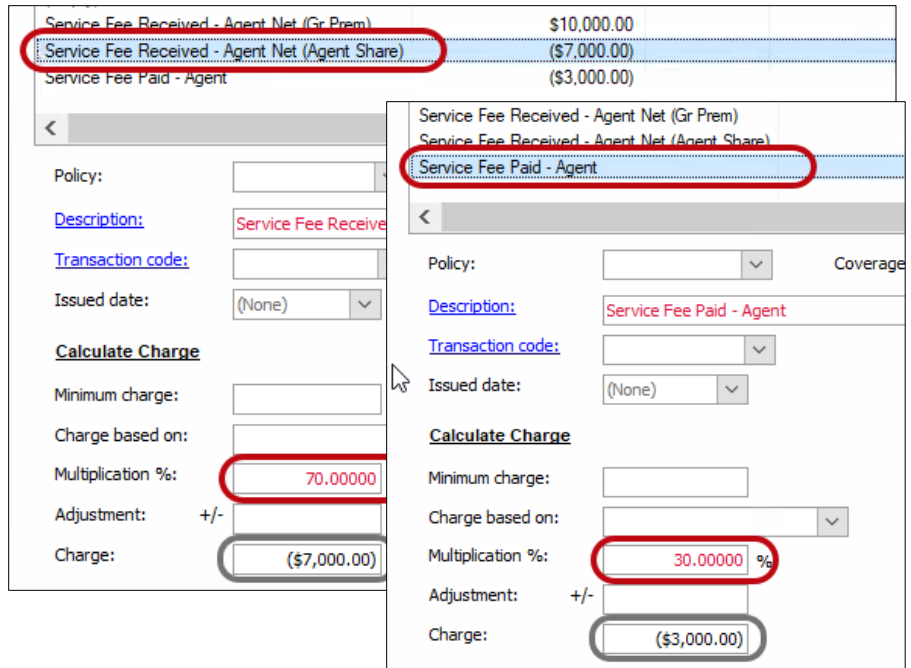
Issued date:  Effective date:

**Calculate Charge**

Minimum charge:  Maximum charge:

## Adding Entries on Escrow Only Orders

7. Highlight the **Service Fee Received – Agent Net (Agent Share)** entry in the grid
8. In the **Multiplication %** field, enter the percent share the Out of Family Outside Title receives
9. Highlight the **Service Fee Paid – Agent** entry in the grid
10. In the **Multiplication %** field, enter the percent share your NBU receives



11. Navigate to the **Order Transactions** screen
12. Verify the amounts (without having to go to the Register)
13. Click the **Group** links to view the split amounts for the **A-** (Escrow branch), **T-Contact** (Outside Out of Family Title), and **T2-Contact** (NBU)

Receipts:

Code	Name	Amount	Details
▶ BA		\$11,036.00	<a href="#">From Buyer</a>

Σ

Total: \$11,036.00

Disbursements:

Code	Name	Amount	Held	Details
▶ T2	▼ <a href="#">Chicago Title Company</a>	\$3,000.00	<input type="checkbox"/>	<a href="#">Group...</a>
A	<a href="#">Chicago Title Insurance Company</a>	\$1,036.00	<input type="checkbox"/>	<a href="#">Group...</a>
T	<a href="#">Delta Title Corp.</a>	\$7,000.00	<input type="checkbox"/>	<a href="#">Group...</a>

14. If adjustments are needed, return to the **Additional Title Charges & Revenue Sharing** screen