Adding for In-Family Revenue Sharing Orders

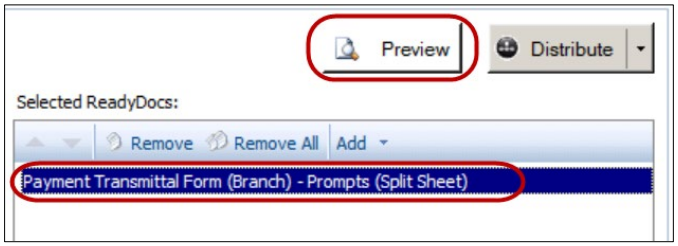
Follow these steps to enter the revenue share entries for In Family Revenue sharing on CSS orders.

Generating the Payment Transmittal Form

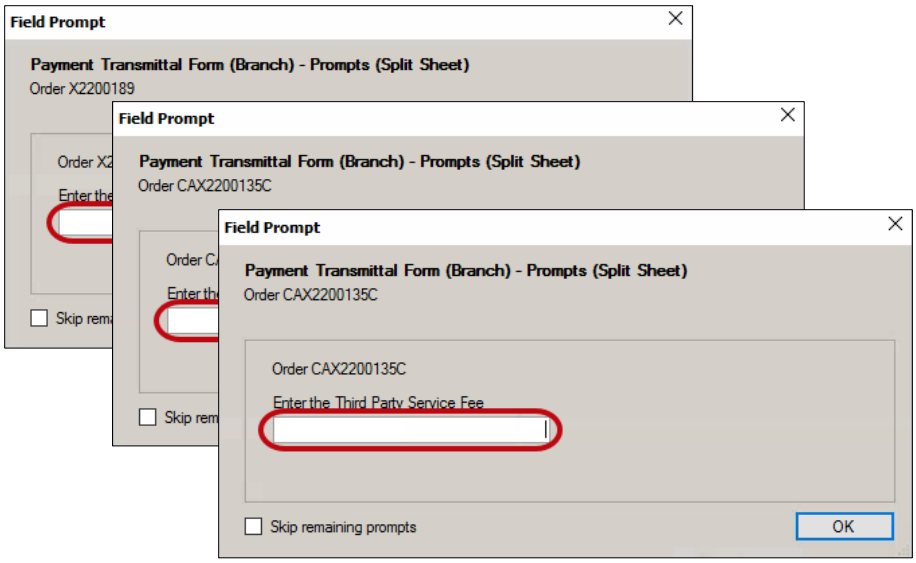
If you have already created the **Payment Transmittal Form (Branch) – Prompts (Split Sheet)** or manually calculated the revenue share skip to the applicable section:

- Escrow Only Revenue Share Outside Title
- T&E or TO Revenue Share Internal Title

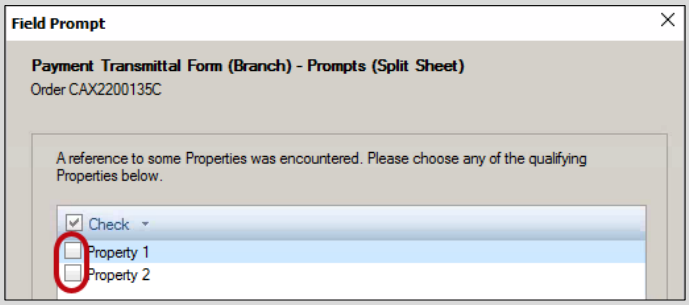
1. From the **Order** ribbon, click the **Documents** button
2. Search for and select the **Payment Transmittal Form (Branch) – Prompts (Split Sheet)**
3. Click the **Preview** button



4. When prompted,
   a) **Enter the total amount for Owners Policy**; click **OK**
   b) **Enter the total amount for Loan Policy**; click **OK**
   c) **Enter the Third-Party Service Fee** (if applicable); click **OK**



NOTE: If your transaction has multiple properties, you are prompted to select the qualifying properties as well.



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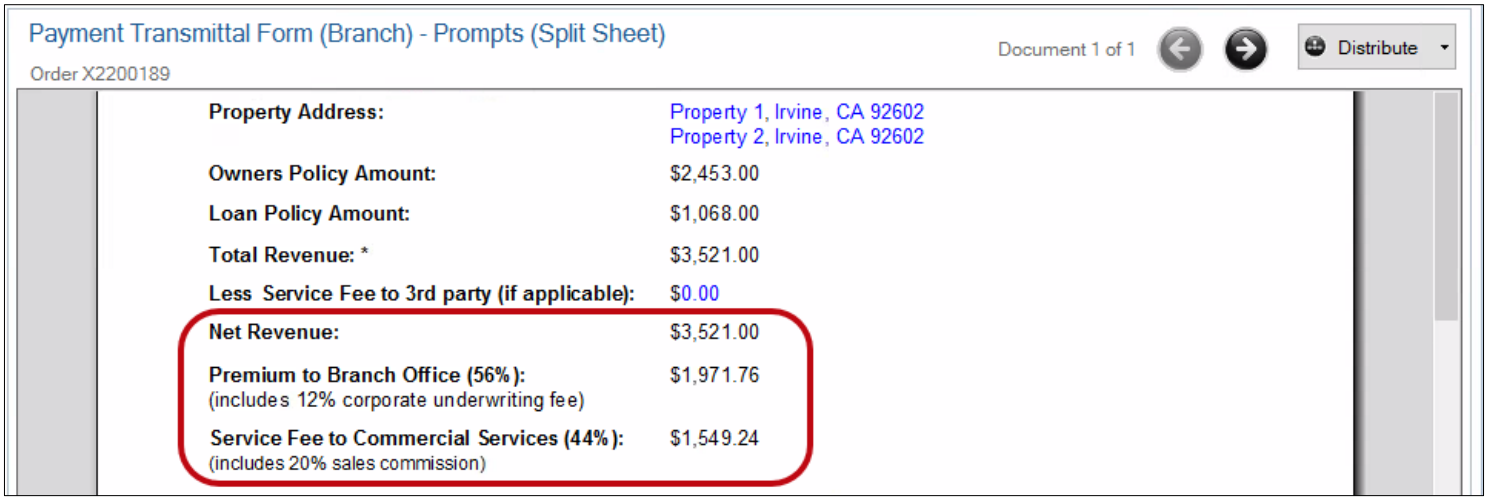
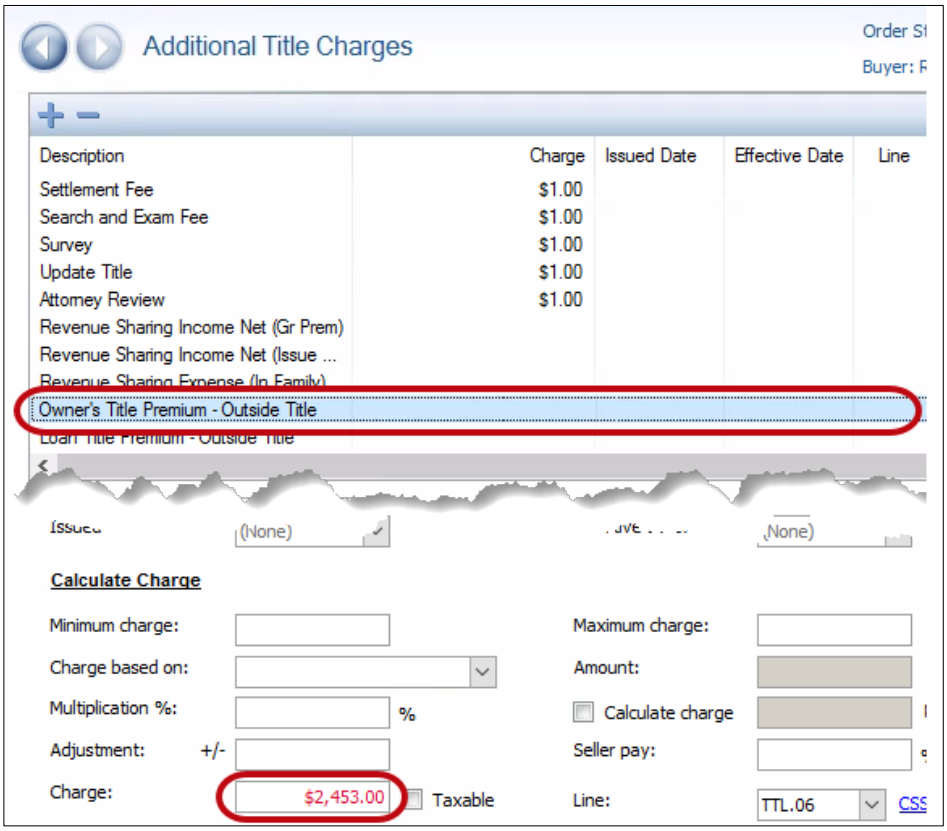
You will use the calculated **Net Revenue, Premium to Branch Office (46%)** and **Service fee to Commercial Services** amounts in the following steps.



Escrow Only Revenue Share Outside Title

1. Navigate to the **Additional Title Charges** screen
2. Highlight the **Owner's Title Premium – Outside Title** entry in the grid as applicable
3. In the **Charge** field, enter the amount



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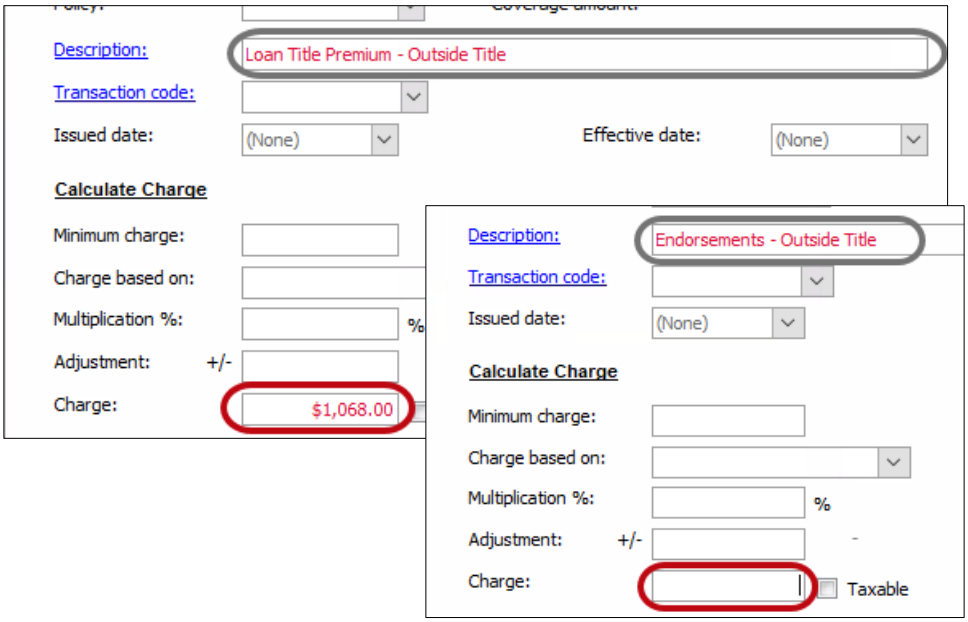
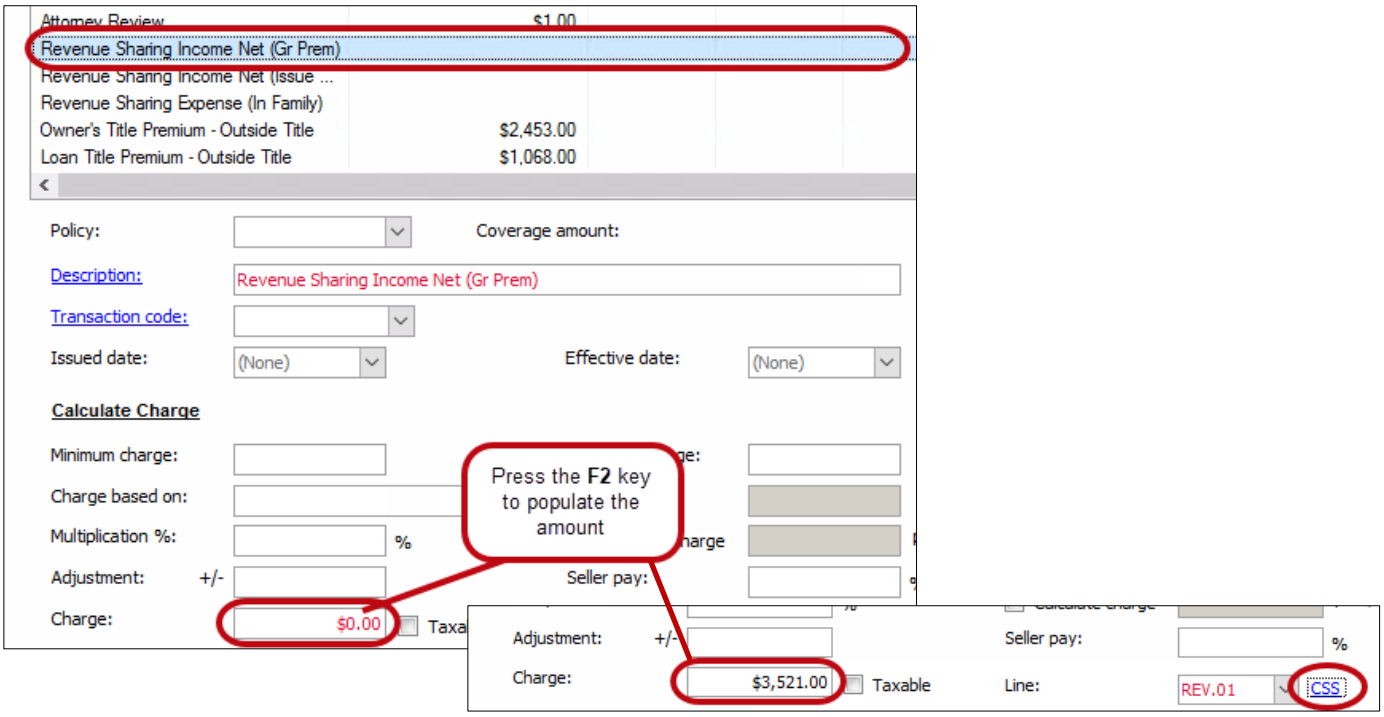
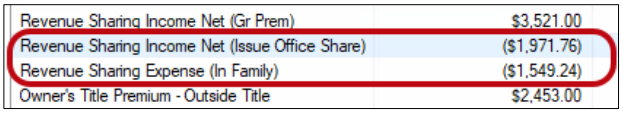
4. If applicable, highlight the **Loan Title Premium – Outside Title** entry in the grid
5. In the **Charge** field, enter the amount
6. If applicable, highlight the **Endorsements – Outside Title** entry in the grid
7. In the **Charge** field, enter the amount of all endorsements



8. Highlight the **Revenue Sharing Income Net (Gr Prem)** entry in the grid
9. In the **Charge** field, press the **F2** key to allow the system to populate the correct amount; this is the total of all premiums (OP, LP and endorsements)



The **Revenue Sharing Income Net (Issue Office Share)** and **Revenue Sharing Expense (In Family)** entries populate with the applicable amounts.



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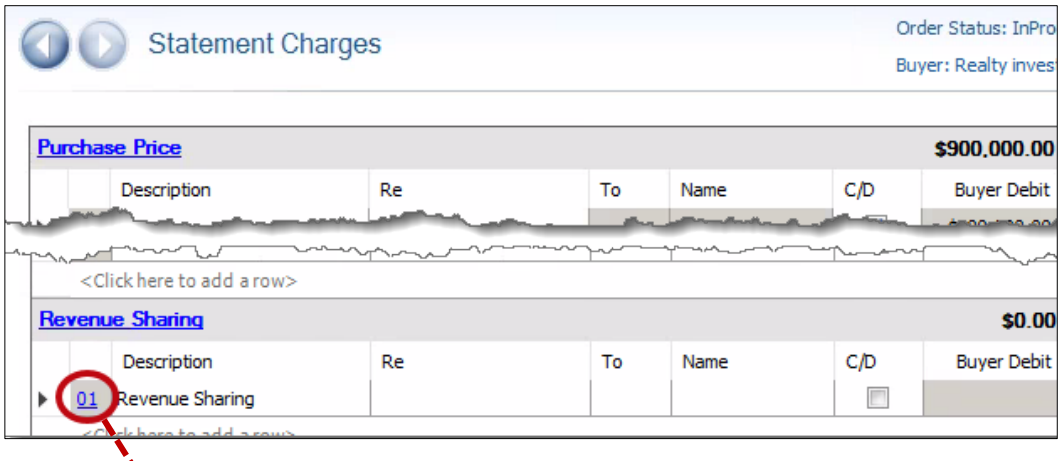
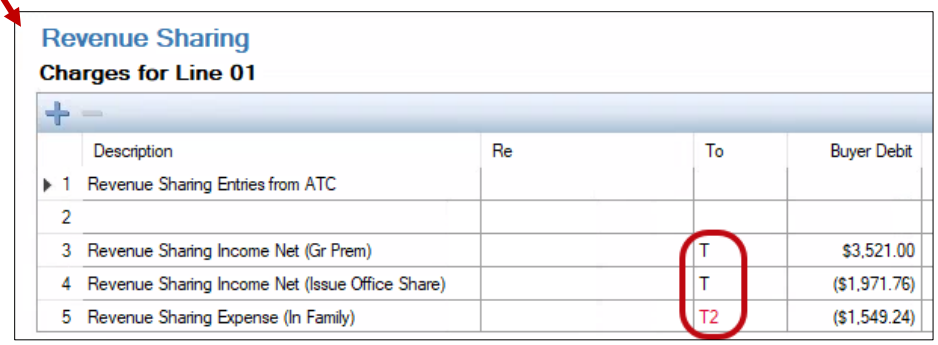
10. Click the **CSS** link to navigate to the **Statement Charges** screen
11. Locate the **Revenue Sharing** entry
12. Click the **Line number** link

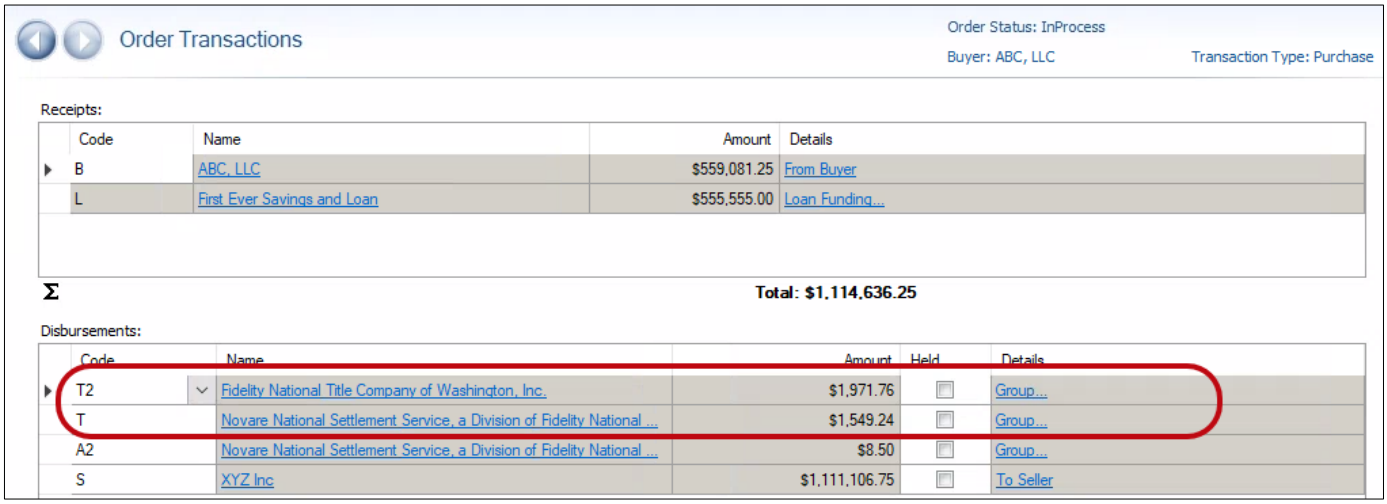


13. Select the **To**-code for,
    a) **Revenue Sharing Income Net (Gr Prem)** = **T**
    b) **Revenue Sharing Income Net (Issue Office Share)** = **T**
    c) **Revenue Sharing Expense (In Family)** = **T2**



NOTE: The **Revenue Sharing Income Net (Gr Prem)** and **Revenue Sharing Income Net (Issue Office Share)** is the contact receiving the revenue share (us). The **Revenue Sharing Expense (In Family)** is the contact issuing the title insurance (them).

14. Navigate to the **Order Transactions** screen
15. Verify the disbursements to the **T**- and **T2**-Contacts; click the **Group** link to view the details if needed



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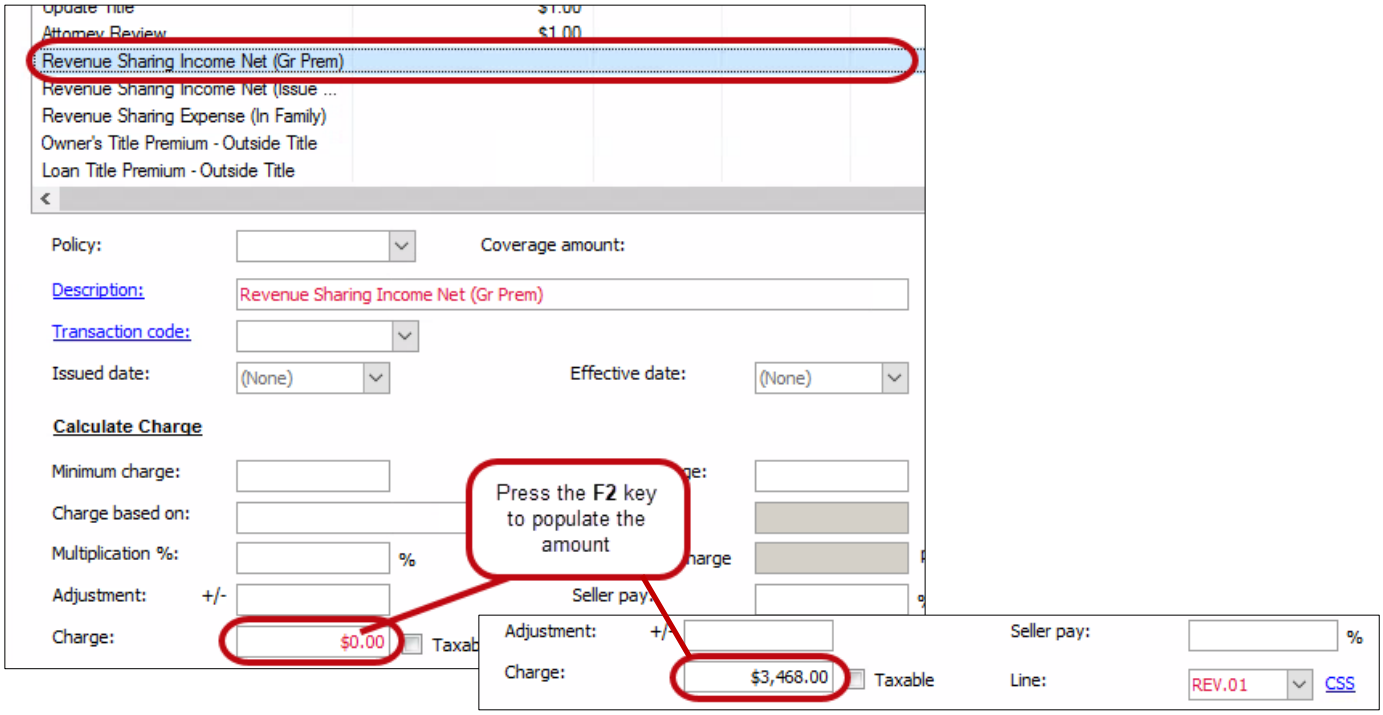
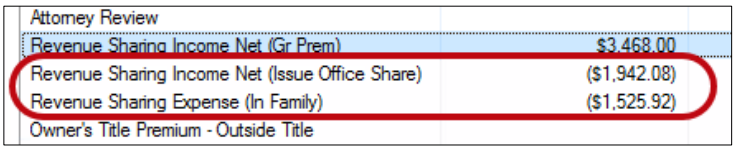
T&E or TO Revenue Share

1. From the,
    a) **Policy Selection** screen, verify the **Policy lookup Code**
    b) **Title Insurance Premiums** screen, verify the **Policy code**
    c) **Endorsements** screen, verify all endorsements have been added
2. Navigate to the **Additional Title Charges** screen
3. Highlight the **Revenue Sharing Income Net (Gr Prem)** entry in the grid
4. In the **Charge** field, press the **F2** key; the system populates the correct amount



The **Revenue Sharing Income Net (Issue Office Share)** and **Revenue Sharing Expense (In Family)** entries populate with the applicable amounts.



5. Click the **CSS** link to navigate to the **Statement Charges** screen

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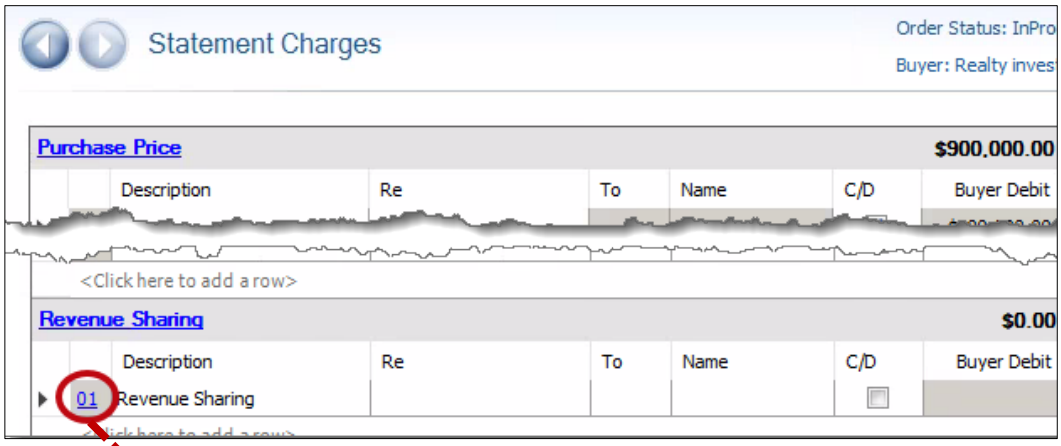
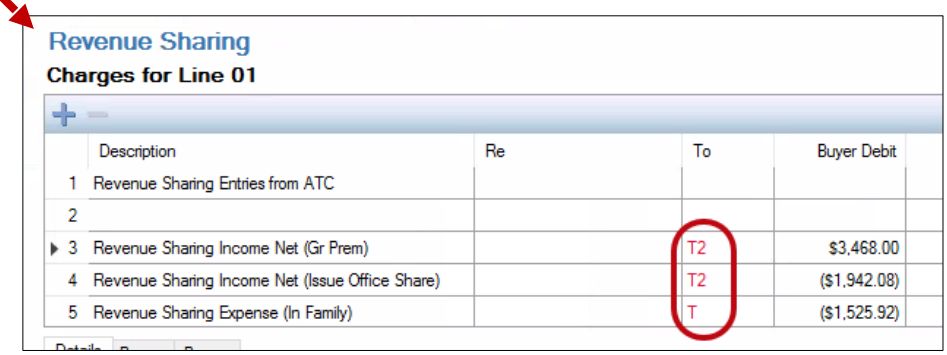
6. Locate the **Revenue Sharing** entry
7. Click the **Line number** link

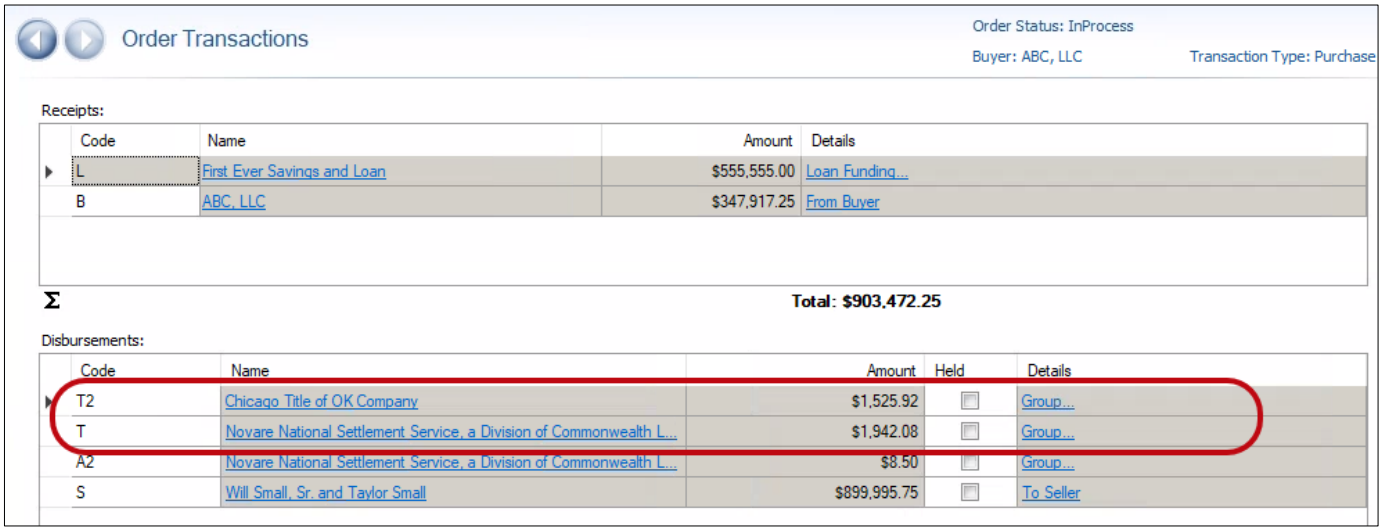


8. Select the **To**-code for,
   a) **Revenue Sharing Income Net (Gr Prem)** = **T2**
   b) **Revenue Sharing Income Net (Issue Office Share)** = **T2**
   c) **Revenue Sharing Expense (In Family)** = **T**



NOTE: The **Revenue Sharing Income Net (GR Prem)** and the **Revenue Sharing Income Net (Issue Office Share)** is the contact receiving the revenue share (them). The **Revenue Sharing Expense (In Family)** is the contact issuing the title insurance (us).

9. Navigate to the **Order Transactions** screen
10. Verify the disbursements to the **T**- and **T2**-Contacts; click the **Group** link to view the details if needed



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