


Follow these steps to open a Straight to Final order, issue the policy and post the invoice payment.

New Order window

- ❑ Create your Order
 - a) Verify the **Settlement type**
 - b) Click the **Search**  icon to select the applicable transaction template (i.e., **02 – Resi – OP Only**; the Straight to Final is typically an Owner’s only)
 - c) Click the **OK** button to generate the order


Express Order Entry screen

- ❑ Verify the,
 - a) **Transaction type**
 - b) **Order type**
 - c) **Product type**
 - d) **Policy type**; a Straight to Final is typically an Owner’s Only

- ❑ Enter **Property** address, **Tab** over to enter the **Zip code**; this populates the **City, State, Zip Code** and **County** fields

- ❑ Enter the legal description in the **Preliminary Opinion/Commitment legal** field; press the **Tab** key to populate the **Final Opinion/Policy legal** field

Order Contacts screen

- ❑ Enter Contacts
 - > use placeholders in the grid first
 - > use the **Add Contacts**  icon to add additional Contacts

Commitment – Schedule A screen

- ❑ Highlight the **Owner's Policy** in the grid,
 - a) Click the **Policy lookup Code** to select the applicable policy
 - b) In the **Coverage amount** field, enter the corresponding amount

Loan:	<input type="text"/>	
Policy lookup Code:	P06A_O_OwnersP	Coverage amount: \$500,000.00
Policy version:	ALTA Owner's Policy (06-17-06)	

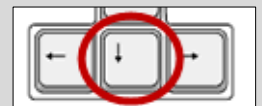
- ❑ If applicable, highlight the **Loan Policy** in the grid,
 - a) Click the **Policy lookup Code** to select the applicable policy
 - b) In the **Coverage amount** field, enter the corresponding amount

NOTE: Do **not** select the Countersignature on this screen; it is setup on the **Policy – Schedule A** screen.

Policy – Schedule A screen

- ❑ Verify the **Policy** shows the **Owner's Policy**
- ❑ Complete the,
 - a) **Issued date/time**
 - b) **Effective date/time**; this is the date/time of the recorded Deed or DT
 - c) **Date/Time completed**; press the **Tab** key (this populates the **Completed by** field with your name)


HINT: Press the **Down Arrow** key in the date/time field to populate the current date and time.

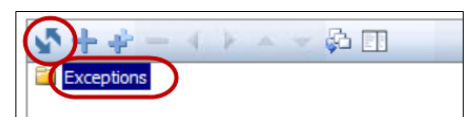


- ❑ Add the **Countersignature**; click the **Lookup code** link to select your signature

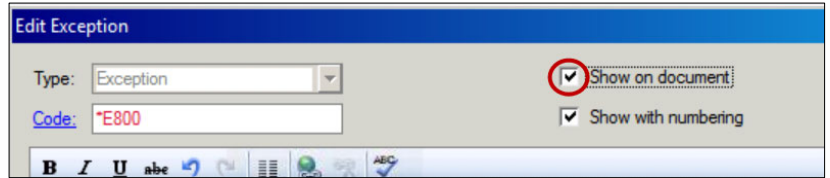
Countersignature	
Signature date:	<input type="text"/>
Lookup code:	Shipp
Sharon Shipp	

Policy – Schedules B1, B2 screen

- ❑ Adding/Removing Exceptions
 - a) Highlight the word **Exceptions** in the grid
 - b) Click the **Start Policy**  icon to pull in the basic exceptions
 - c) Verify exceptions; change, add or remove as needed

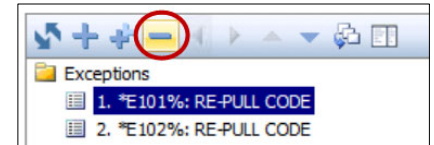


- > Removing Exceptions
 - » Double-click the Exception you wish to remove; uncheck the **Show on document** check box




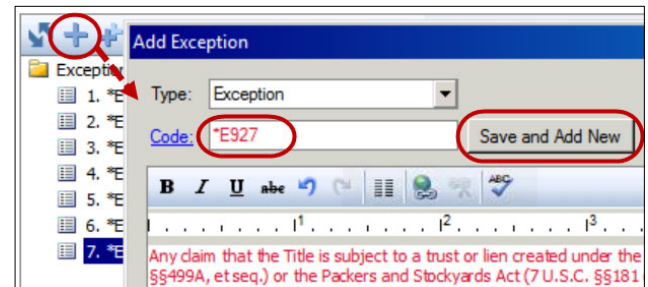
-OR-

- » Highlight the Exception; press the **Delete Exception**  icon



- > Adding Exceptions

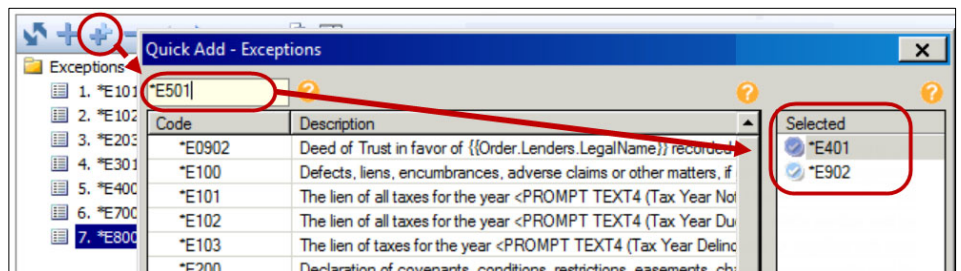
- » **Add Exceptions**  icon
 - a) Click the **Code** link to add a single exception
 - b) Click **Save and Add New** to continue adding one exception at a time



-OR-


- » **Quick Add Exceptions**  icon

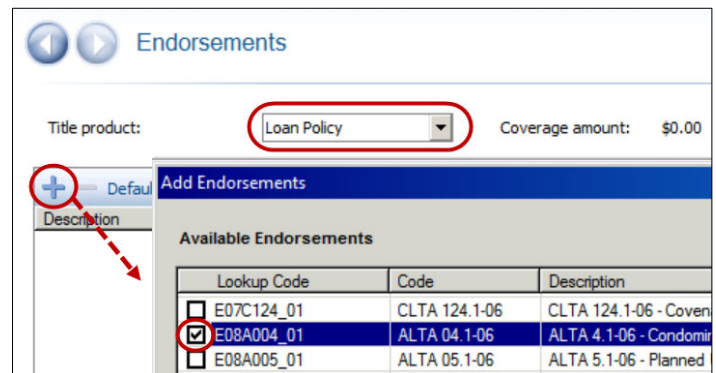
- a) Enter your codes at the **Quick Add-Exception** window
- b) Once you've added all your



Exceptions, click the **OK** button to answer corresponding Exception prompts

Endorsements screen (if applicable)

- Verify the applicable **Title product** is selected; if not, select
- Add the Endorsement(s)
 - a) Click the **Add Endorsements**  icon
 - b) Check the check box for the applicable endorsement(s)



Title Insurance Premiums screen

- Select **Policy code**
- In the **Underwriter case number** field, enter your NRC quote

Policy type:	Owners
Policy code:	NCFT-01-Standard Owner's Policy
Description:	Fidelity National-NC-Standard Owner's Policy
Underwriter case number:	ENTER NRC QUOTE NUMBER HERE

Invoice screen

- From the **Status** drop-down, select **Sent**

Status:	Pending
Due date:	Pending
	Sent
	Canceled
	Quote

- Post your Invoice Payment
 - a) Click the **Invoice Payments** more/less bar

Invoice Payments (1)			
Date Paid	Payment Description	Reference Number	Payment Amount
03/27/2018	Payment of Invoice No. 1		\$1,024.00
Total payments:			\$1,024.00
Invoice balance:			\$0.00

- b) Enter the **Date Paid**
- c) Enter a **Payment Description**, if applicable
- d) Enter **Reference Number**, if applicable
- e) Enter the **Payment Amount**
- f) **Save** the order (press **Ctrl + S**) to post to CRRAR

Documents

- Double-click the applicable Policy documents to move them to the **Selected Ready Docs**
- Click the **Preview** button to review

Preview	Distribute
Selected ReadyDocs:	
Remove Remove All Add	
Transmittal (Policy - Attorney)	
Master Owner's Policy	
Privacy Statement	

- From the **Documents Distribution** screen, check the **Print** and **Publish** check boxes; click **Distribute**
- Close the **Documents** tab

Save and Exit

- Press **Ctrl + Alt + T** to close the order
- Email the Policy document(s) from smartview to the Closing Attorney