

Applying an Order Template

Follow the steps in the appropriate section to apply a template to an order.

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Rules on Applying Templates

When applying multiple order templates, remember the rule: **First in Wins!** Meaning that all the templates are applied, but the information in the first template takes precedence over the information in the next template, and so on.

Applying Templates When Creating an Order

1. Create a new order New Order 2. Select the **Settlement type** Prefix: ~ XTR-2023-00175 Order number: 3. If applicable, allow the **Default** template TRAINING Trust account: 4. Click the **Search** icon to search for the transaction-type Settlement type: Closing Disclosure template O Commercial O HUD-1 5. In the **Order Search** window, the default **Search for** setting is set to search for Templates; click the Search button Orders/Templates to copy NOTE: You can also press the Enter key if no search Order/Template criteria is to be entered. CTCI Default CDF Order Search Order Information Search for v through (None) Order status Product type √ through v through (None) Title officer: Order completed: Code Name

Last name:

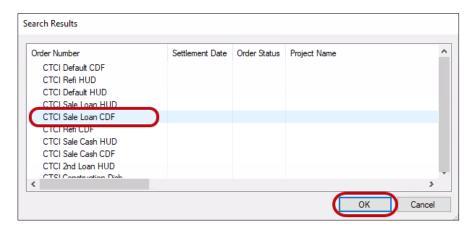
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First name



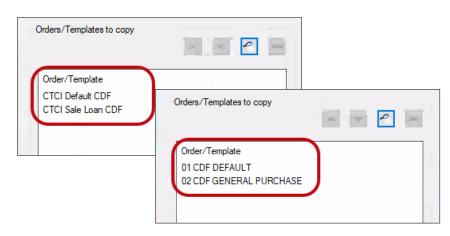
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6. Select the transaction-type template; click **OK**



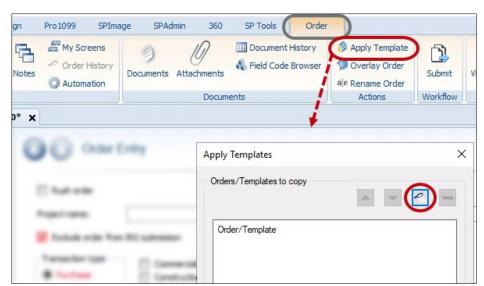
Your operation may

- use a Default template. Because the Default template is first, its order details take precedence over the transactiontype template.
- number your templates to indicate the order in which they should be applied.



Applying Templates After Creating an Order

- From the Order ribbon, click Apply Template
- 2. Click the **Search** icon to search for the additional template
- From the Order Search window, press the Search button (or Enter key) to bypass the search screen





Applying an Order Template

4. Double-click the additional template you wish to apply

NOTE: If you are applying multiple templates, remember that the first template's order details take precedence over the one below it, and so on.

- 5. Click **OK** to apply the template
- 6. Click **OK** to confirm

