Creating a 00-Client-Specific Template

The **00-Client Specific** template is to be used in conjunction with the Novare standardized template with a "01" prefix and the corresponding tasking template.

To determine if a **00-Client Specific** template is needed versus the standard template with a specific customer added, one or more of the following must apply.

- The client has multiple People contacts that need to be included for correspondence.
- The client has other contacts that need to be used for services when they are the customer.
- The client is associated with other contacts that must always be associated with all of their orders.
- The client has specific fees that need to be shown on their statements.

> **NOTE**: If Payees are not in the **00-Client Specific** template, consult with SoftPro to assist with formulas to allow the payees from the Novare template to populate once the template is applied.

Follow these steps to create the **00-Client Specific** template.

1. Verify **Current Profile** = **Novare**; change if needed
2. Search for an order for this customer to use as a guide; this should be an order that was previously used successfully. This will be used to determine how the template is setup. (Make note of the order number as you'll use this in later steps.)

Items to consider:

a) Is this a residential or commercial customer?

Determine Settlement type: CDF, HUD or CSS

b) Does this customer always conduct the same kind of business, such as a lender that always sends refinance transactions. If so, review the Novare template that will always be used with this template.

Determine if it is appropriate to hard code the following fields; only default these entries if they occur 80% of the time.

- **Transaction type**
- **Order type**
- **Product type**
- **Policy type**

c) Review and determine the contacts that are to be associated with the client in every transaction. The **Overly Order** process is used to pull in these contacts to the **00-Client Specific** template.

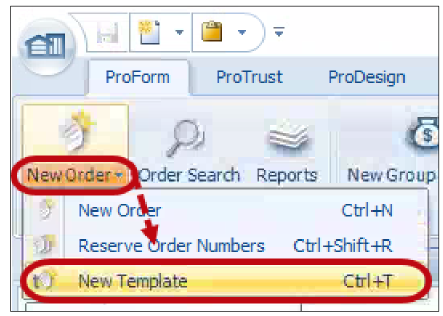
> **NOTE**: Revenue contacts **cannot be templated**; they must be added new with every order and placeholders pull in with the "01" template.

d) Review the settlement statement charge screens.

Determine if there are any fees that are charges every time that go to the contact determined in the prior step. If so, these can be added to the template.

NOTE: This would not include the revenue charges; they pull in with the "01" template.

3. Click the **New Order** drop-down, select **New Template**; you can also use the **CTRL + T** shortcut keys



From the **New Template** window,

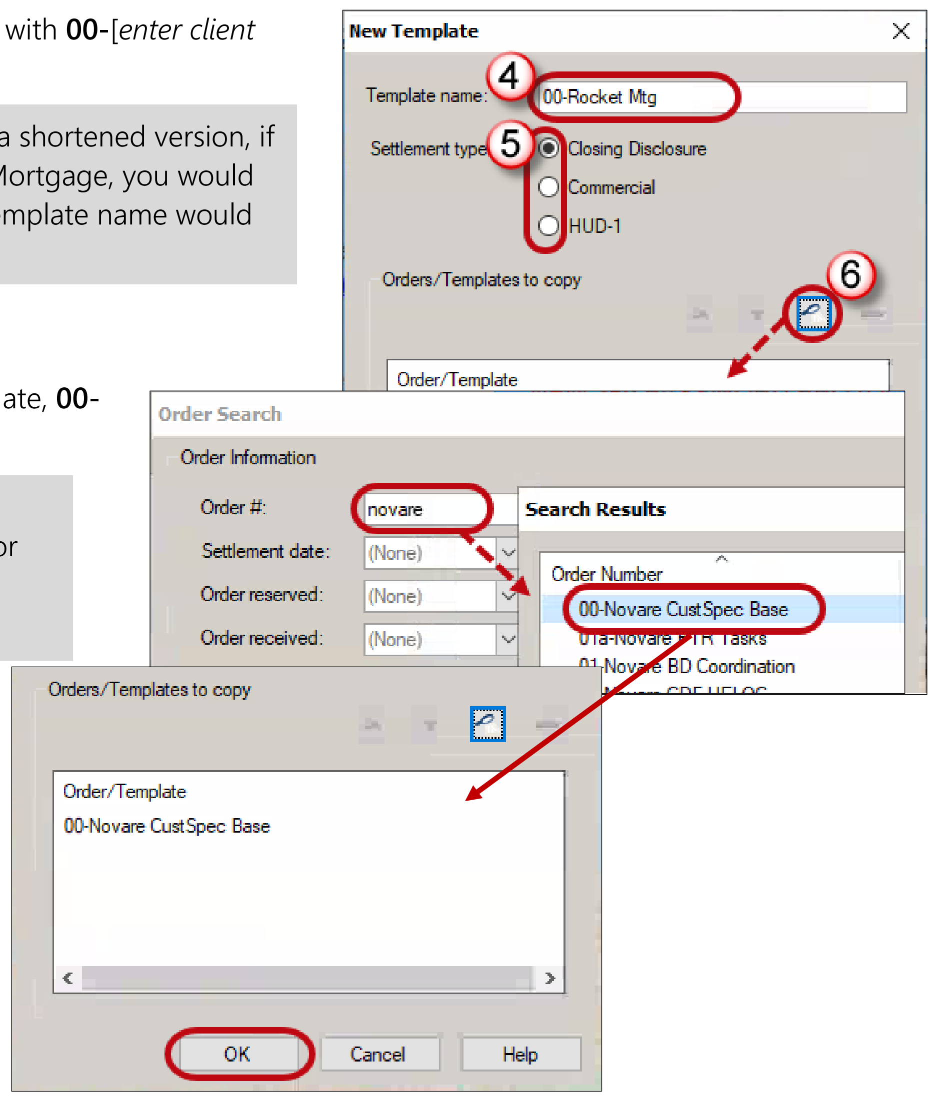
4. Enter the Template name beginning with **00-**[*enter client name*]

   NOTE: The client name should be a shortened version, if the client name is Rocket Mortgage, you would enter "Rocket Mtg". The template name would be: ***00-Rocket Mtg***.

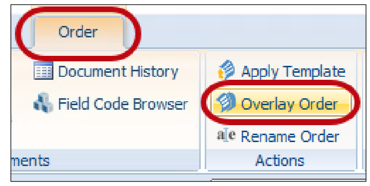
5. Select the **Settlement type**
6. Search for and select the base template, **00-Novare CustSpec Base**

   NOTE: This template provides the appropriate placeholders for the Client Contact and CSS sections.

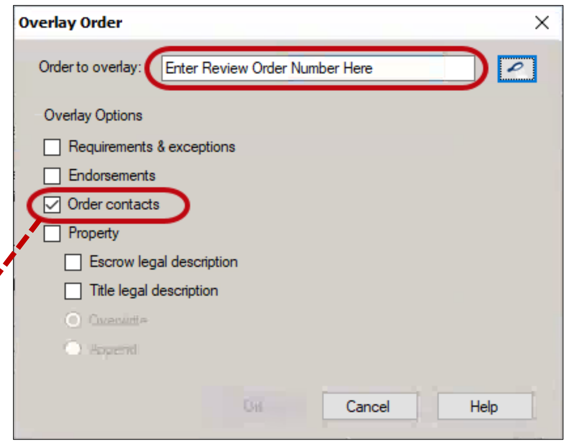
7. Click **OK** to open the template



8. Using your previous determinations, adjust the **Order Entry** screen as applicable
9. Overlay the order selected in **step 1**
    a. From the **Order** ribbon, click the **Overlay Order** button



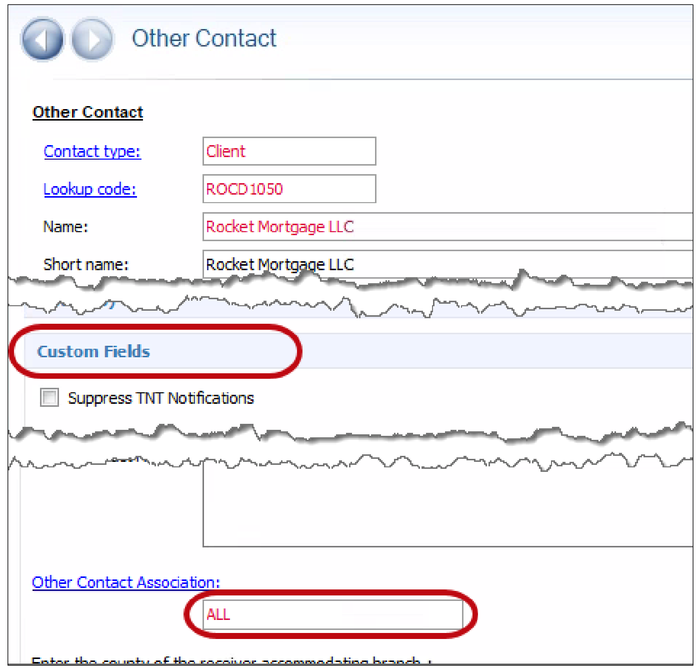
    b. **Order to overlay** = enter the above order number
    c. Check the **Order Contacts** check box; the **Overlay Order Contacts** window immediately opens
    d. Select the **O-Client** Contact from the **Source order**
    e. Select the **O**-Contact from the **Destination order**; click the **Add** button
    f. When prompted, click the **Replace** button



    g. Repeat **steps d-e** to pull in remaining Contacts as needed
    h. Click **OK** when all desired Contacts have been added
    i. Click the **OK** button from the **Overlay Order** window
    j. Click **OK** when prompted
10. Navigate to the **Order Contacts** screen
11. Double-click the **Client** Contact

12. Click the **Custom Fields** more/less bar to expand
13. Verify the Contact contains **Other Contact Association** is populated

> **NOTE**: The **Other Contact Association** field **must** be populated for fees to pull into the order. If it does not have an entry, clear the contact and re-pull from the **Lookup Table**.



14. Depending upon the **Settlement Type** selected initially, navigate to **CDF Pg2-sections A-J** or **CDF Pg3-Sections K-N & Calc to Close** or **Settlement Statement Charges** screen
15. Make adjustments as needed
16. Close and save the template