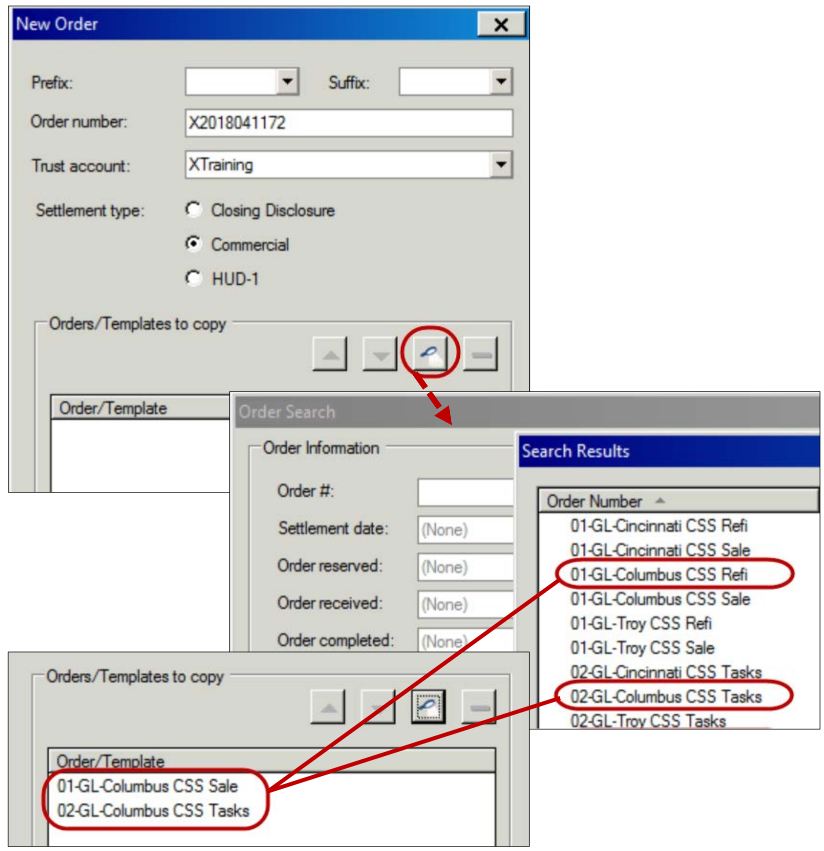
Follow the steps in the corresponding section to process your Title Only order.

Creating the Order

1. Create a new order
2. Apply templates
   a) Click the **Search** icon; press the **Enter** key
   b) Highlight the appropriate template
      - 01-GL-[*applicable city*] CSS [**Refi** or **Sale**]
   c) Holding the **Ctrl** key, highlight the,
      - 02-GL-[*applicable city*] CSS **Tasks** template
   d) Click the **OK** button
   e) Click the **OK** button to generate the order



Entering Order Details

On the **Order Entry** screen,

3. From the **Order type** drop-down, select **Title only**; it is **important** that the Order type is changed for formulas to work properly
4. Verify the **Product type** and **Policy type**; change if needed

5. Select the **Escrow Officer/Closer**; this allows the EO to receive wire notifications

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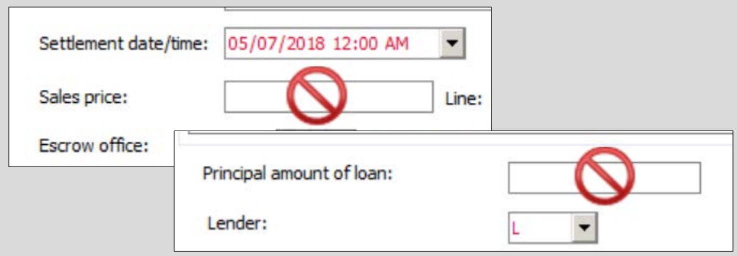
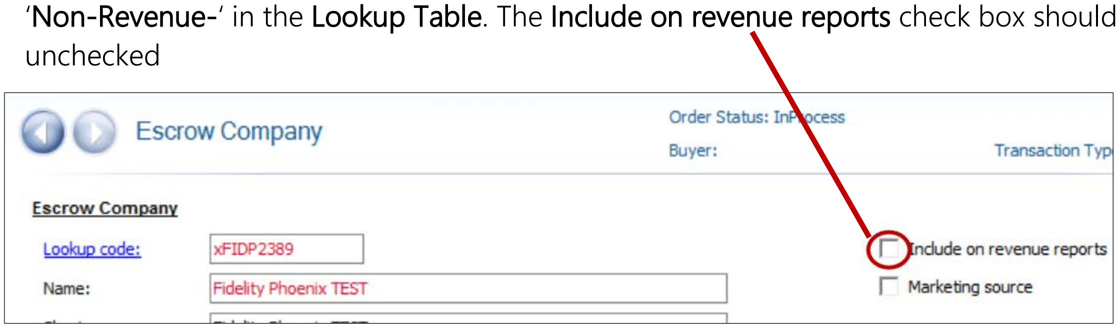
6. If applicable, select the **Pre-closer/Escrow assistant** and/or **Title officer/Examiner**
7. Enter or select, the **Settlement date** (if known)
8. Enter the **Property address**; entering the **Zip Code** populates the **City, State** and **County** fields

NOTE: Do **not** enter the **Sales price** or **Principal amount of loan**. Coverage amounts are entered on the **Policy Selection** screen in a later step.



Entering Contacts

9. Navigate to the **Order Contacts** screen
10. Enter the,
    - **E**-Escrow Company; this is your Customer
        - **Columbus** leave blank
        - **All others,** use the **Lookup code** link to select; this is a non-revenue contact and is listed as '**Non-Revenue-**' in the **Lookup Table**. The **Include on revenue reports** check box should be unchecked



    - **A**-Settlement Agent = your local office
    - **A2**-Settlement Agent = defaults to the **Settlement Recording Agent**
    - **A3**-Settlement Agent = your local office (if needed)
    - **T**-Title Company = your office
    - **T2**-Title Company = auto-populates with the **E**-Escrow Company Contact
    - **U**-Underwriter = the Customer's requested Underwriter

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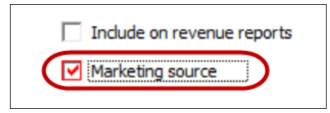
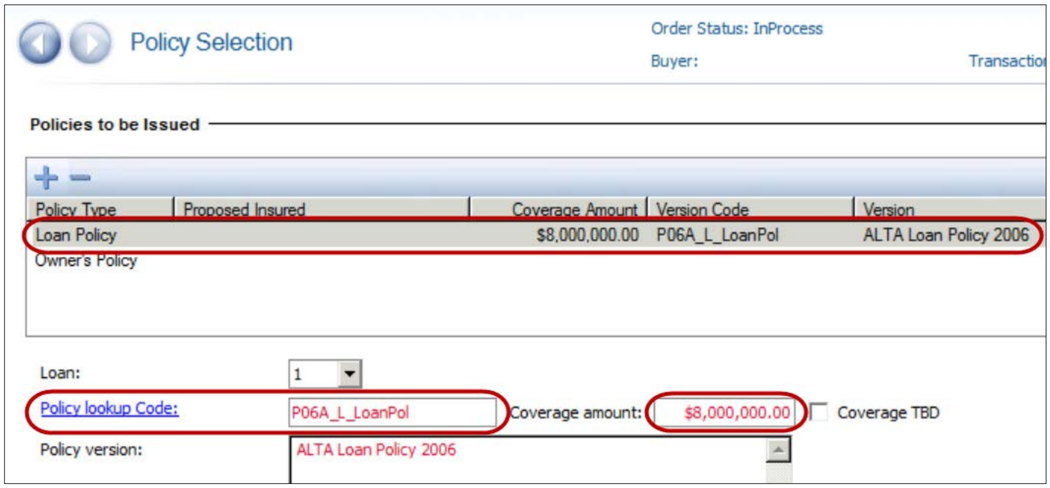
11. Enter all remaining Contacts using placeholders first; when entering the Contact that gave you the order, check the **Marketing source** check box

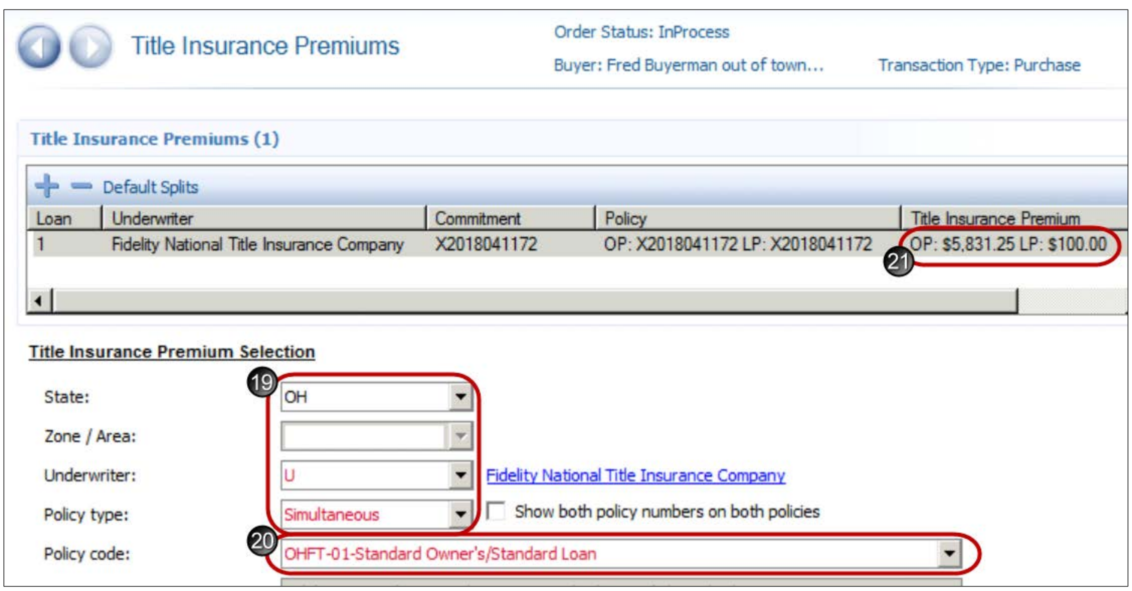


Calculating Premiums

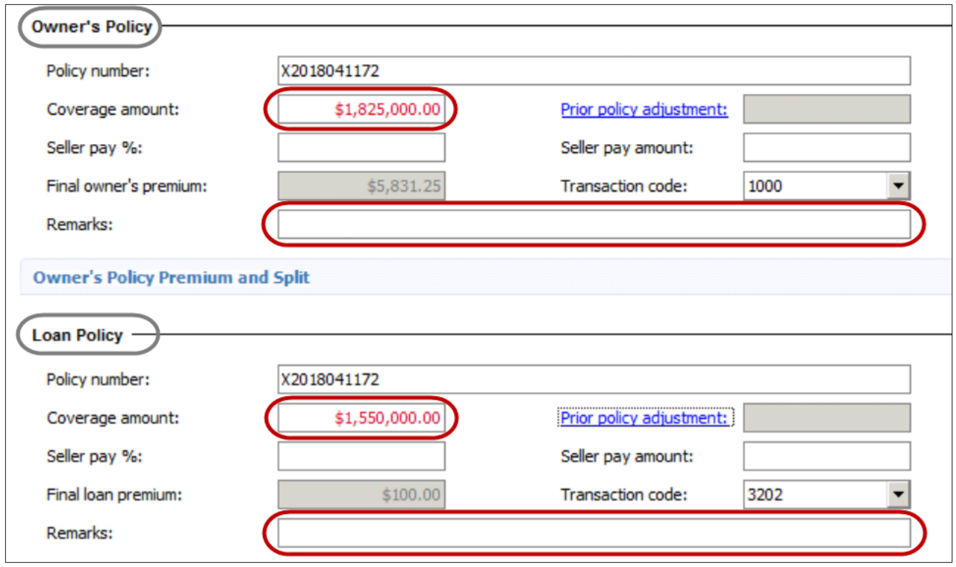
12. Navigate to the **Policy Selection** screen
13. Highlight the first policy in the grid
14. Click the **Policy lookup Code**
15. Double-click the applicable policy to select
16. Enter the **Coverage amount**
17. Repeat for each remaining policy in the grid



18. Navigate to the **Title Insurance Premiums** screen
19. Verify the,
    - **State**
    - **Underwriter**
    - **Policy type**
20. From the **Policy code** drop-down, select the applicable policy
21. Verify the premium calculation (in the grid)



22. Verify the **Coverage amount** is populated in the **Owner's Policy** (and **Loan Policy**) section(s)
23. Check the **Remarks** field for any prior policy adjustment comments



Completing the Open Order Process

24. Click the **Documents** button
25. **Publish** the **Open Order Sheet (Order Summary)** to smartVIEW
26. Submit your order
    - Using **SoftPro 360 > TitleWave**, refer to the job aid, ***SoftPro 360 – TitleWave*** for the process
    - Using an outside search
27. If applicable, send the fee split sheet to the Escrow Company

Entering Fees

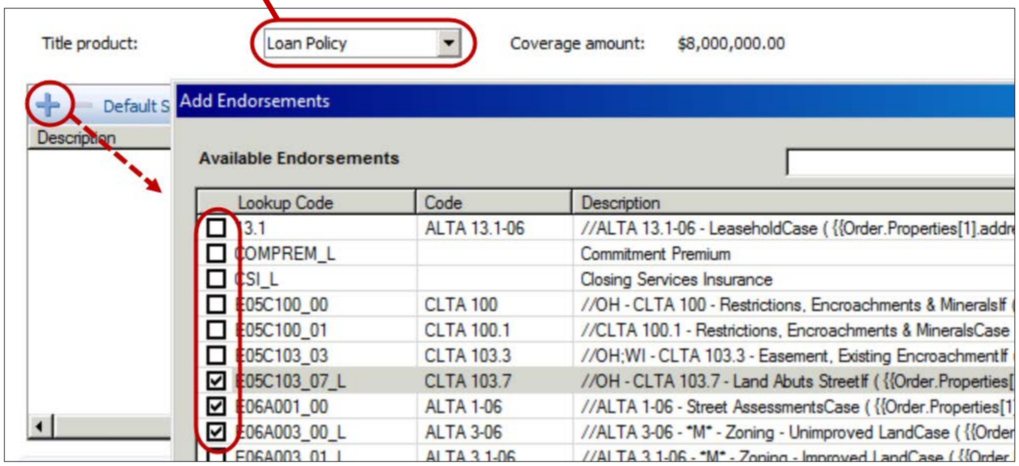
Adding Commitment Charge

Troy office, skip to **Step 5**. All other offices continue on to next step.

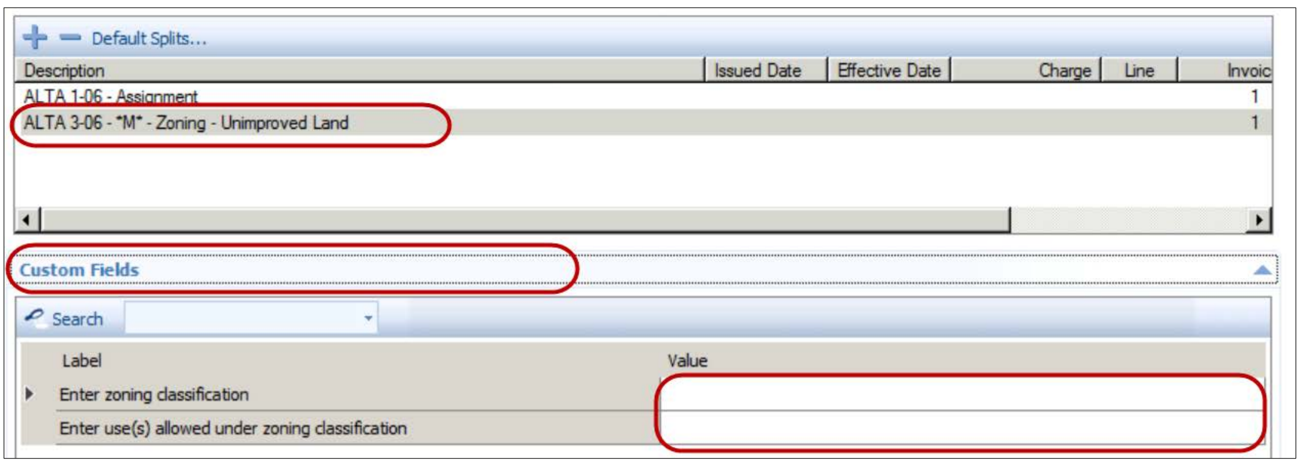
1. Navigate to the **Endorsements** screen
2. From the **Title product** drop-down, select **Commitment**
3. Click the **Add Endorsements**  icon
4. Check the **Commitment Premium** check box; click the **OK** button

Adding Policy Endorsements

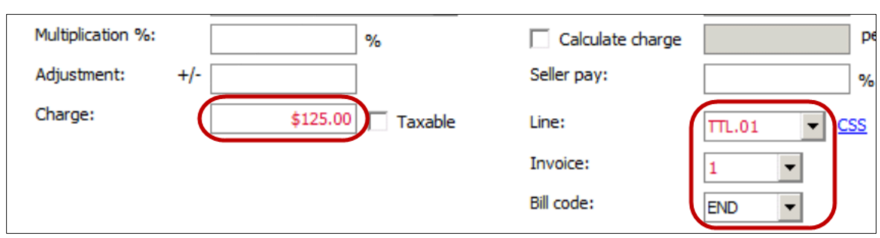
5. If applicable, from the **Title product** drop-down, select a Policy (i.e., Loan and/or Owner's, whichever you want to add Endorsements to)
6. Click the **Add Endorsements** ➕ icon
7. Check the check box(es) for the **Endorsement(s)** you wish to add for the policy selected in **Step 5**



8. Highlight an endorsement in the grid
   a) Click the **Custom Fields** more/less bar to answer corresponding prompts



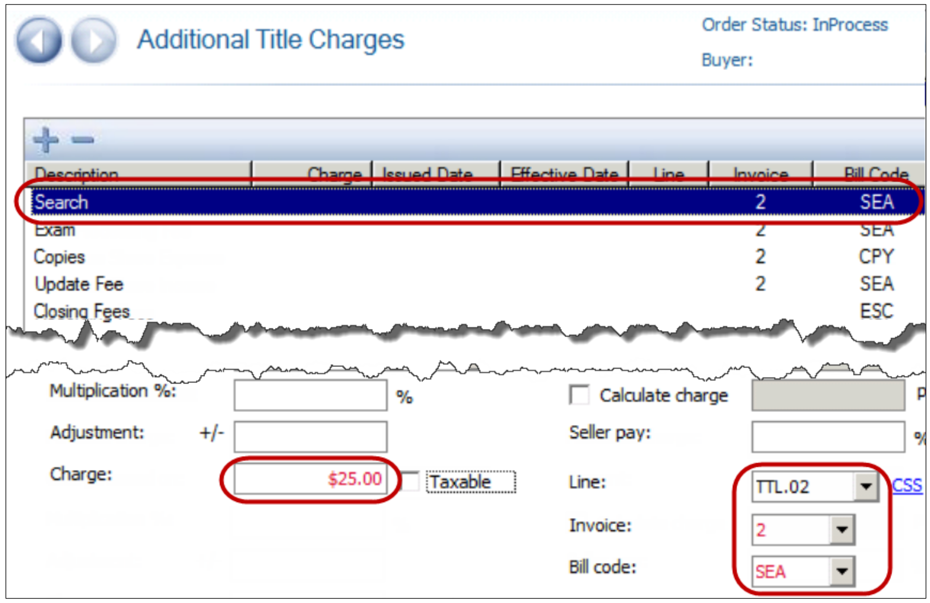
   b) Enter or verify the **Charge**
   c) Verify the **Line** assigned; change if needed
   d) Verify the **Invoice** and **Bill code** are assigned; **do not change**



   e) Repeat **Steps a-d** for each Endorsement
9. If applicable, repeat **Steps 5-8** to add Endorsements to another policy

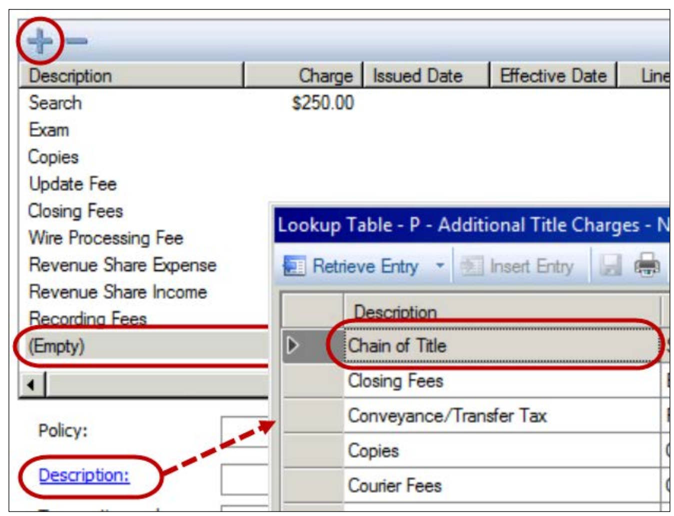
Adding Title Charges

10. Navigate to the **Additional Title Charges** screen
11. Highlight a placeholder in the grid (i.e., **Search, Exam, Copies**, etc.)
12. Enter or verify,
    a) In the **Charge** field, enter the corresponding fee
    b) Verify the **Line** assigned; change if needed
    c) Verify an **Invoice** is assigned; this may be changed if needed
    d) Verify the **Bill code** is assigned – **do not change**

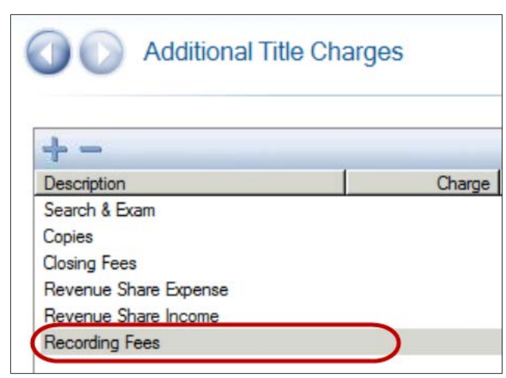


13. If you need to add additional title charges that do not have a placeholder,
    a) Click the **Add Additional Title Charge**  icon
    b) Click the **Description** link
    c) Double-click the applicable entry
    d) Repeat **Step 12**
    e) Repeat **Step 13a-d** until all fees are entered

> NOTE: The **Payee** for all title charges is the **T**-Contact (your office).



14. Enter Recording charges – you can use the **Additional Title Charges** screen or enter directly on the **Statement Charges** screen.
    〉 If you use the **Additional Title Charges** screen
        i. Highlight the **Recording Fees** entry in the grid



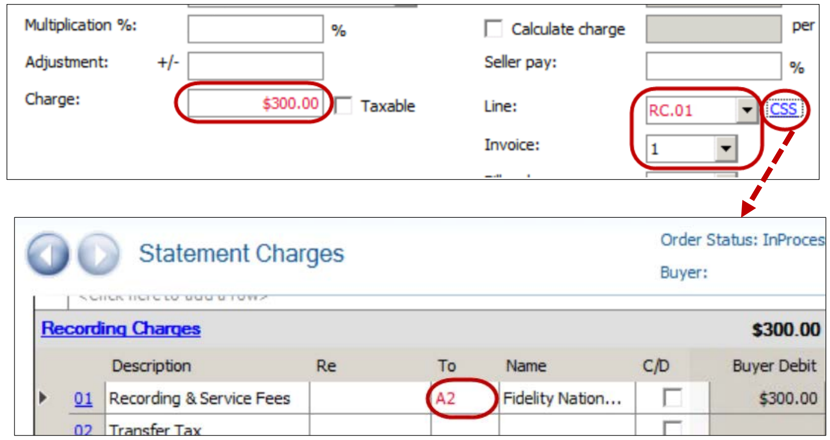
ii. In the **Charge** field, enter the amount provided by the outside Company, (non-revenue **E-/T2-**Contact)

iii. Verify **Line** = **RC.01**

iv. Verify an **Invoice** number is assigned

v. Click the **CSS** link

vi. Verify the **To** code = **A2**



- If you use the **Statement Charges** screen to enter the fee directly on **Line RC.01**

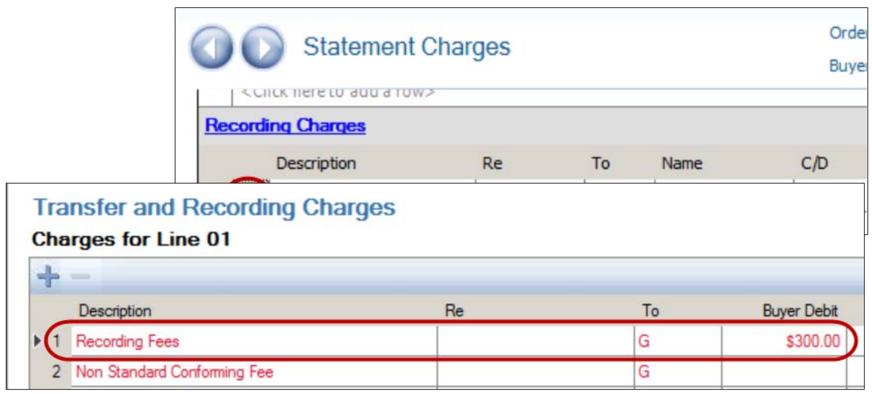
  i. Click the **Line** number link

  ii. Enter or select the,

    a. **Description**

    b. **To** code = **G**

    c. **Buyer Debit** = recording fee



Entering Revenue Sharing Entries

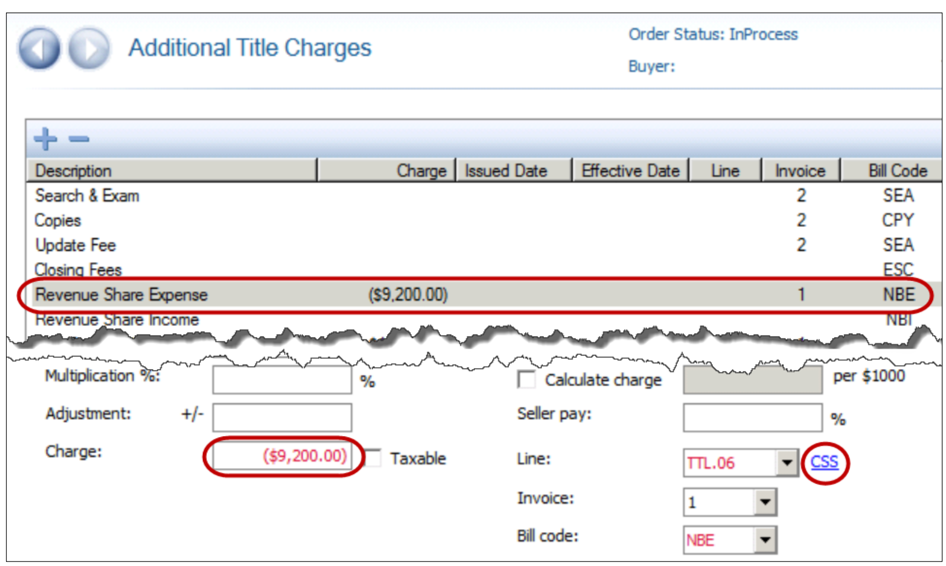
15. Navigate to the **Additional Title Charges** screen

16. Add the Revenue Share Expense

  a) Highlight the **Revenue Share Expense** entry in the grid

  b) In the **Charge** field, enter the amount as a **negative** number

  c) Click the **CSS** link



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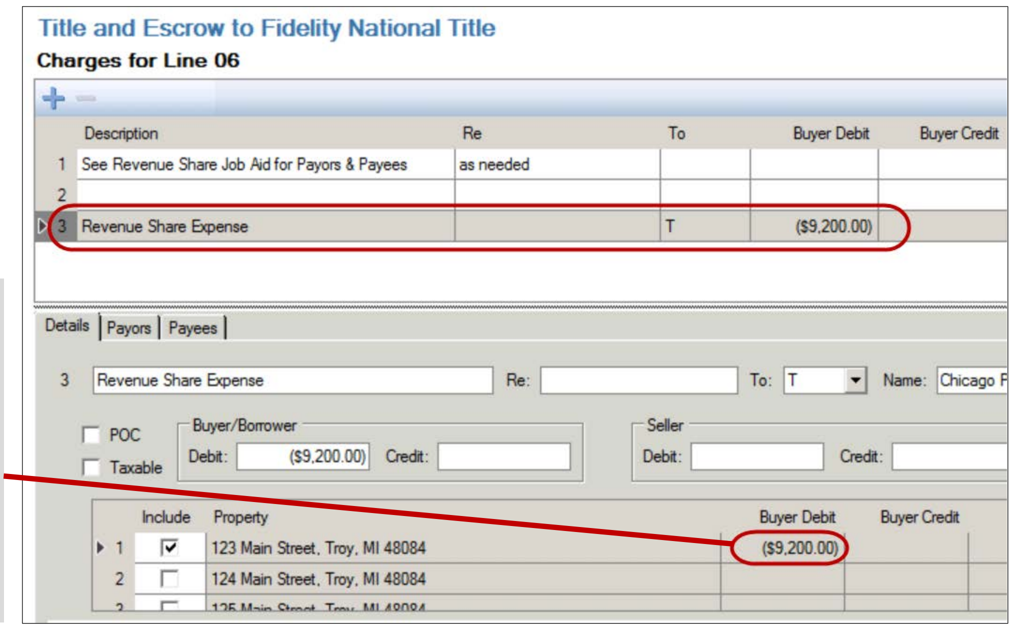
d) Click the **Line** number link of the line assigned

e) Highlight the **Revenue Share Expense** entry

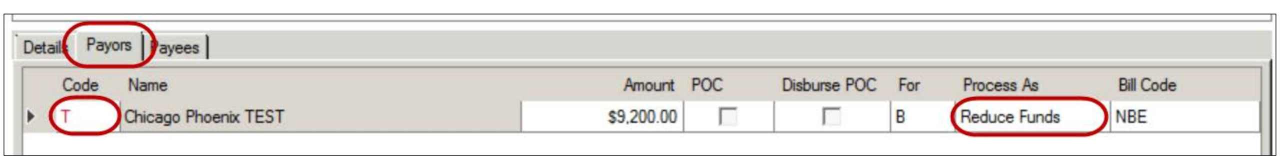


NOTE: If the order has multiple properties, CRRAR validation rules require the Revenue Share Income/Expense entries be associated with only **one** property. Enter the total amount in the **Buyer Debit** field of the first property.

f) Click the **Payors** tab

g) From the **Code** drop-down, select **T**

h) Verify **Process as = Reduce Funds;** click the **Close** button



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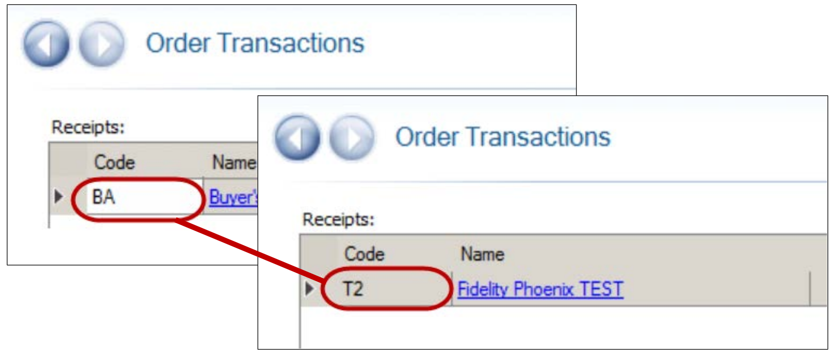
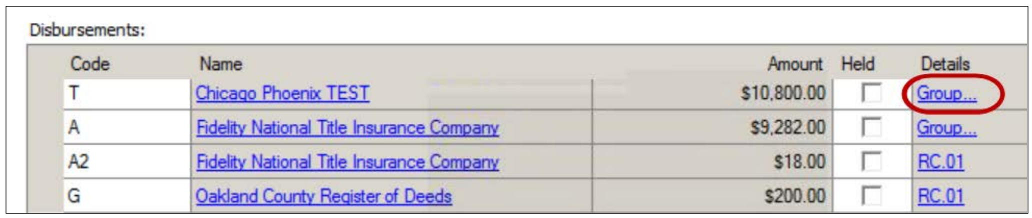
17. Navigate to the **Order Transactions** screen
18. Where the **Receipts** > **Code** = **BA**, select **T2** from the drop-down

Before

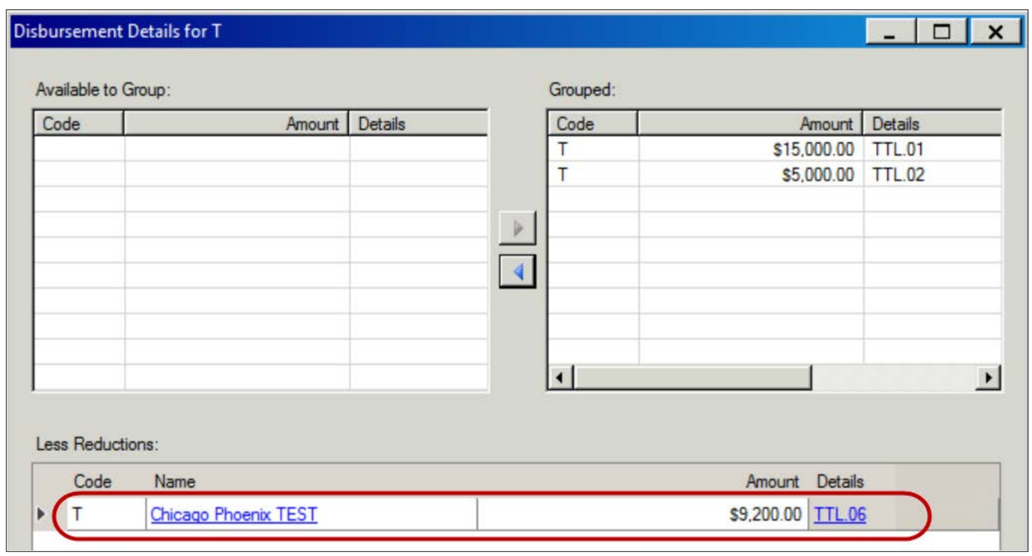
After



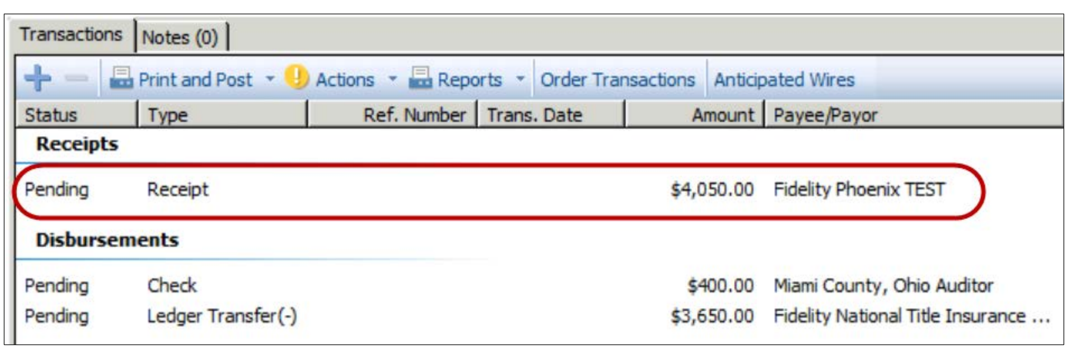
19. In the **Disbursements** section, click the **Group** link for the **T**-Contact



20. Verify the **Revenue Share Expense** is shown in the **Less Reductions** section



The **Register** shows the net pending receipt from the outside Company (non-revenue **E-/T2**-Contact)



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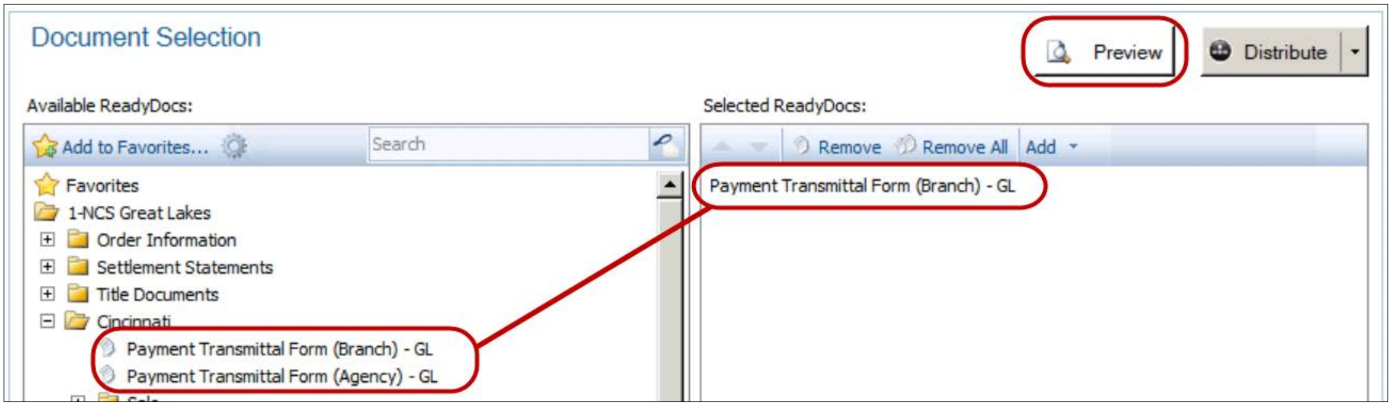
21. From the **Order** ribbon, click the **Documents** button
22. Search for, and select, the **Payment Transmittal Form (Branch) – GL** (or **Payment Transmittal Form (Agency) – GL**, as applicable)
23. **Preview** and **Publish** the document to smartVIEW
24. Distribute to the outside Company, (non-revenue **E-**/**T2-**Contact)



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