
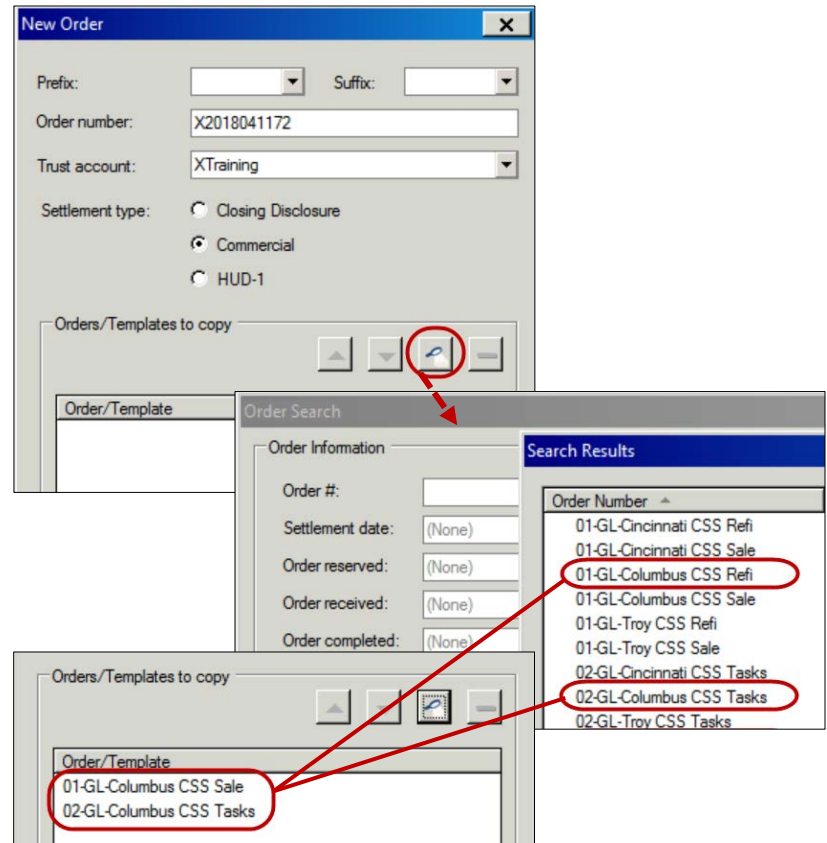


Follow the steps in the corresponding section to process your Title Only order.

- > Opening the Order | [Page 1](#)
- > Entering Fees | [Page 4](#)

Creating the Order

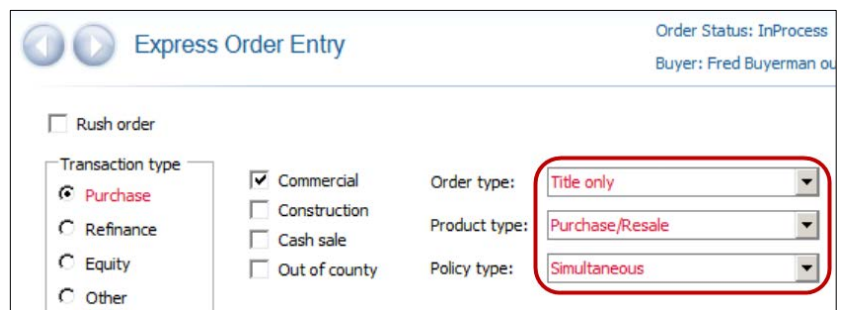
1. Create a new order
2. Apply templates
 - a) Click the **Search**  icon; press the **Enter** key
 - b) Highlight the appropriate template
 - 01-GL-[*applicable city*] CSS [Refi or Sale]
 - c) Holding the **Ctrl** key, highlight the,
 - 02-GL-[*applicable city*] CSS Tasks template
 - d) Click the **OK**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

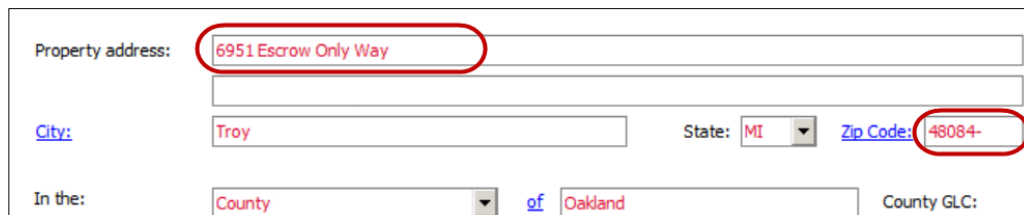


Processing a Title Only Order

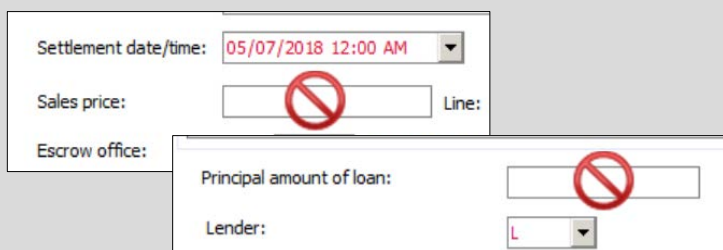
6. If applicable, select the **Pre-closer/Escrow assistant** and/or **Title officer/Examiner**

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

Processing a Title Only Order

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

☐ Include on revenue reports
☒ **Marketing source**

Calculating Premiums

- Navigate to the **Policy Selection** screen
- Highlight the first policy in the grid
- Click the **Policy lookup Code**
- Double-click the applicable policy to select
- Enter the **Coverage amount**
- Repeat for each remaining policy in the grid

Policy Selection
Order Status: InProcess
Buyer:
Transaction:

Policies to be Issued

Policy Type	Proposed Insured	Coverage Amount	Version Code	Version
Loan Policy		\$8,000,000.00	P06A_L_LoanPol	ALTA Loan Policy 2006
Owner's Policy				

Loan: 1
Policy lookup Code: P06A_L_LoanPol
Coverage amount: \$8,000,000.00
☐ Coverage TBD

Policy version: ALTA Loan Policy 2006

- Navigate to the **Title Insurance Premiums** screen
- Verify the,

- > State
- > Underwriter
- > Policy type

- From the **Policy code** drop-down, select the applicable policy
- Verify the premium calculation (in the grid)

Title Insurance Premiums
Order Status: InProcess
Buyer: Fred Buyerman out of town...
Transaction Type: Purchase

Title Insurance Premiums (1)

Loan	Underwriter	Commitment	Policy	Title Insurance Premium
1	Fidelity National Title Insurance Company	X2018041172	OP: X2018041172 LP: X2018041172	OP: \$5,831.25 LP: \$100.00

Title Insurance Premium Selection

State: OH
Zone / Area:
Underwriter: U Fidelity National Title Insurance Company
Policy type: Simultaneous ☐ Show both policy numbers on both policies
Policy code: OHFT-01-Standard Owner's/Standard Loan

Processing a Title Only Order

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

Owner's Policy

Policy number: X2018041172
Coverage amount: **\$1,825,000.00**
Seller pay %:
Final owner's premium: \$5,831.25
Remarks:

[Prior policy adjustment:](#)
Seller pay amount:
Transaction code: 1000

Owner's Policy Premium and Split

Loan Policy

Policy number: X2018041172
Coverage amount: **\$1,550,000.00**
Seller pay %:
Final loan premium: \$100.00
Remarks:

[Prior policy adjustment:](#)
Seller pay amount:
Transaction code: 3202


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

Endorsements


Title product: **Commitment**

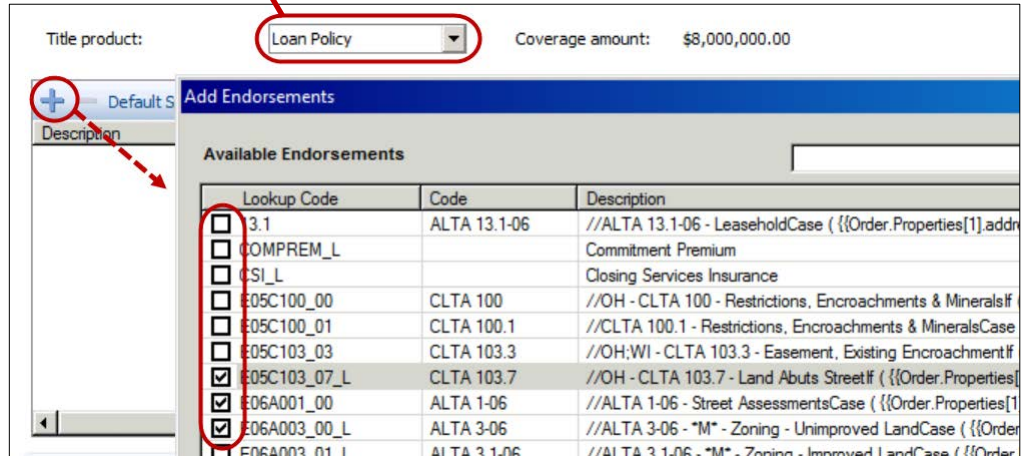
+ Defa

Add Endorsements

Lookup Code	Code	Description
<input checked="" type="checkbox"/> COMPREM_OH		Commitment
<input type="checkbox"/> GLCPL_B		Closing Protection Letter-Bomw

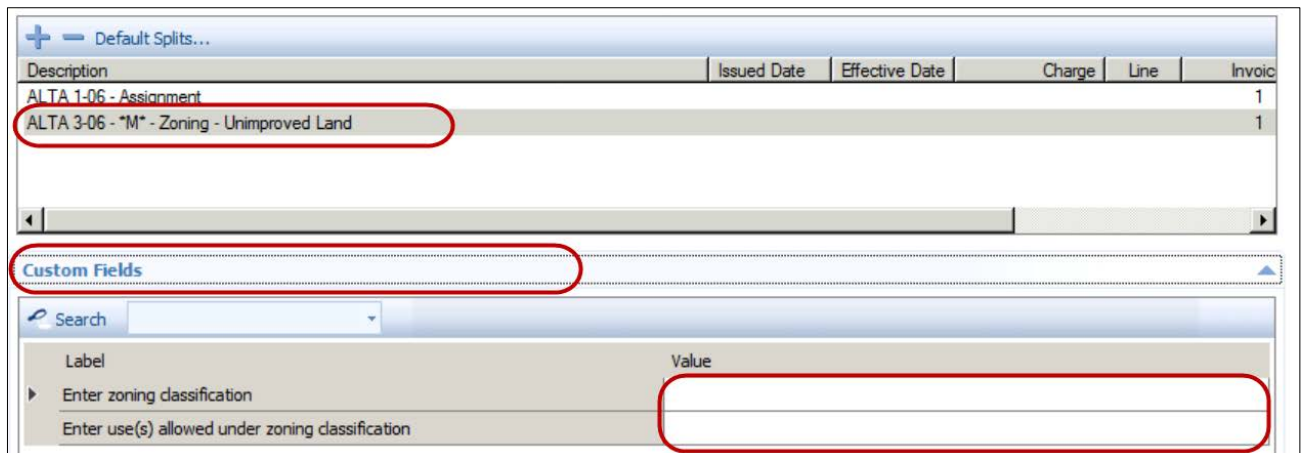
Adding Policy Endorsements

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**



Lookup Code	Code	Description
<input type="checkbox"/> 3.1	ALTA 13.1-06	//ALTA 13.1-06 - LeaseholdCase ({{Order.Properties[1].addr
<input type="checkbox"/> COMPREM_L		Commitment Premium
<input type="checkbox"/> CSI_L		Closing Services Insurance
<input type="checkbox"/> E05C100_00	CLTA 100	//OH - CLTA 100 - Restrictions, Encroachments & MineralsIf
<input type="checkbox"/> E05C100_01	CLTA 100.1	//CLTA 100.1 - Restrictions, Encroachments & MineralsCase
<input type="checkbox"/> E05C103_03	CLTA 103.3	//OH;WI - CLTA 103.3 - Easement, Existing EncroachmentIf
<input checked="" type="checkbox"/> E05C103_07_L	CLTA 103.7	//OH - CLTA 103.7 - Land Abuts StreetIf ({{Order.Properties[1
<input checked="" type="checkbox"/> E06A001_00	ALTA 1-06	//ALTA 1-06 - Street AssessmentsCase ({{Order.Properties[1
<input checked="" type="checkbox"/> E06A003_00_L	ALTA 3-06	//ALTA 3-06 - *M* - Zoning - Unimproved LandCase ({{Order
<input type="checkbox"/> E06A003_01_L	ALTA 3.1-06	//ALTA 3.1-06 - *M* - Zoning - Improved LandCase ({{Order

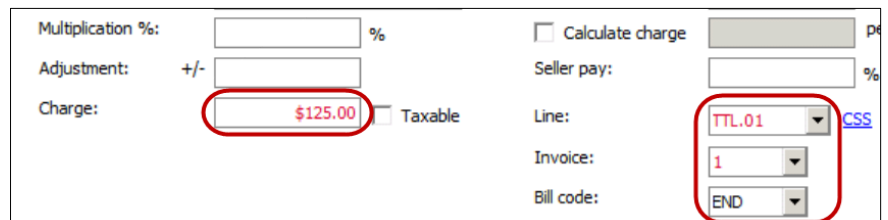
8. Highlight an endorsement in the grid
 - a) Click the **Custom Fields** more/less bar to answer corresponding prompts



Description	Issued Date	Effective Date	Charge	Line	Invoice
ALTA 1-06 - Assignment					1
ALTA 3-06 - *M* - Zoning - Unimproved Land					1

Label	Value
Enter zoning classification	
Enter use(s) allowed under zoning classification	

- 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



Multiplication %:		%	<input type="checkbox"/> Calculate charge		%
Adjustment:	+/-		Seller pay:		%
Charge:	\$125.00	<input type="checkbox"/> Taxable	Line:	TTL.01	
			Invoice:	1	
			Bill code:	END	

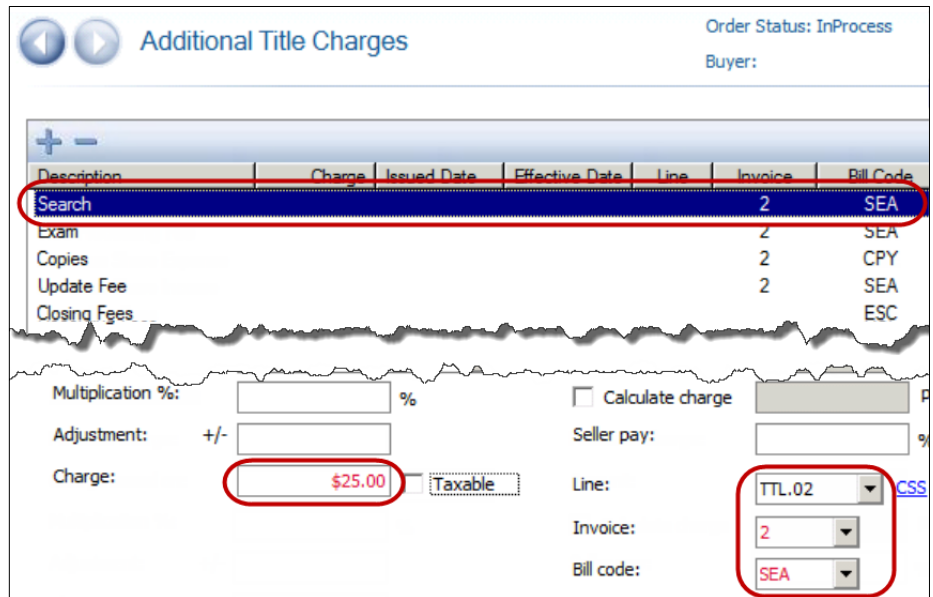
9. If applicable, repeat **Steps 5-8** to add Endorsements to another policy

Processing a Title Only Order


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,

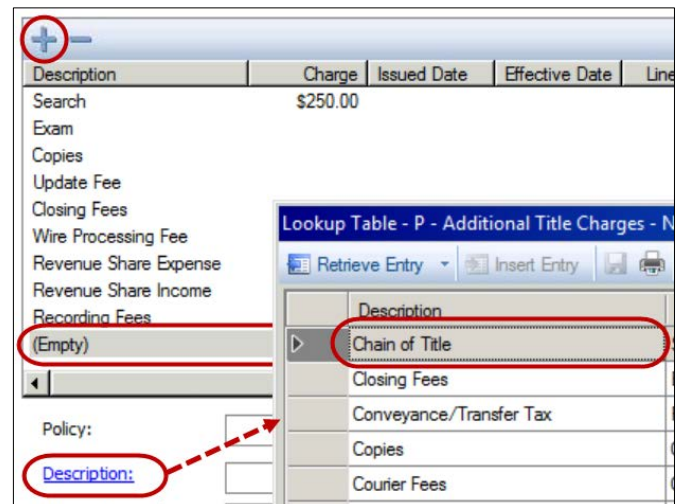
- a) In the **Charge** field, enter the corresponding fee
- b) Verify the **Line** assigned; change if needed
- c) Verify an **Invoice** is assigned; this may be changed if needed
- d) Verify the **Bill code** is assigned – **do not change**



13. If you need to add additional title charges that do not have a placeholder,

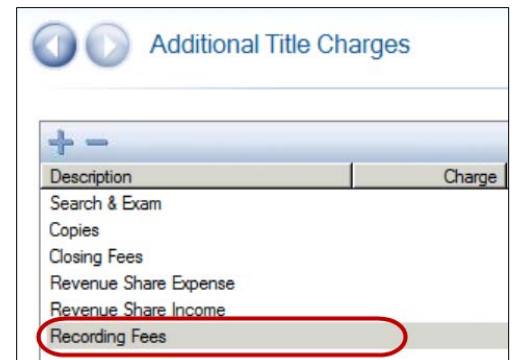
- a) Click the **Add Additional Title Charge**  icon
- b) Click the **Description** link
- c) Double-click the applicable entry
- d) Repeat **Step 12**
- e) Repeat **Step 13a-d** until all fees are entered

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



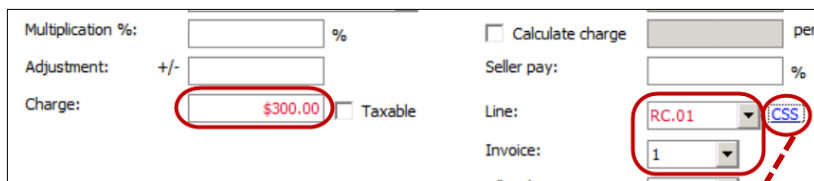
14. Enter Recording charges – you can use the **Additional Title Charges** screen or enter directly on the **Statement Charges** screen.

- › If you use the **Additional Title Charges** screen
 - i. Highlight the **Recording Fees** entry in the grid



Processing a Title Only Order

- 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



Statement Charges

Order Status: InProcess
Buyer:

Description	Re	To	Name	C/D	Buyer Debit
01 Recording & Service Fees		A2	Fidelity Nation...		\$300.00
02 Transfer Tax					

› 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

Statement Charges

Order Status: InProcess
Buyer:

Description	Re	To	Name	C/D	Buyer Debit
1 Recording Fees		G			\$300.00
2 Non Standard Conforming Fee		G			

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

Additional Title Charges

Order Status: InProcess
Buyer:

Description	Charge	Issued Date	Effective Date	Line	Invoice	Bill Code
Search & Exam					2	SEA
Copies					2	CPY
Update Fee					2	SEA
Closing Fees						ESC
Revenue Share Expense	(\$9,200.00)			1		NBE
Revenue Share Income						NBI

Multiplication %: % ☐ Calculate charge per \$1000

Adjustment: +/-

Charge: (\$9,200.00) ☐ Taxable

Line: TTL.06 ☐ CSS

Invoice: 1

Bill code: NBE

Processing a Title Only Order

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

Statement Charges

Order Status: InProcess
Buyer: Buyer's LLC

Click here to add a new line

Title/Escrow Charges						\$3,650.00
	Description	Re	To	Name	C/D	Buyer Debit
01	Commitment Premium		T	Fidelity Natio...	<input type="checkbox"/>	\$100.00
02	ALTA 3-06 - *M* - Zonin...		T	Fidelity Natio...	<input type="checkbox"/>	\$500.00
03	Loan Policy Premium		T	Fidelity Natio...	<input type="checkbox"/>	\$100.00
04	Owner's Policy Premium		T	Fidelity Natio...	<input type="checkbox"/>	\$11,000.00
05	Search		T	Fidelity Natio...	<input type="checkbox"/>	\$300.00
06	Revenue Sharing				<input type="checkbox"/>	(\$9,200.00)
07	Exam		T	Fidelity Natio...	<input type="checkbox"/>	\$250.00

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

Title and Escrow to Fidelity National Title

Charges for Line 06

	Description	Re	To	Buyer Debit	Buyer Credit
1	See Revenue Share Job Aid for Payors & Payees	as needed			
2					
3	Revenue Share Expense		T	(\$9,200.00)	

Details | Payors | Payees

3 Revenue Share Expense Re: To: T Name: Chicago P

☐ POC ☐ Taxable

Buyer/Borrower Debit: (\$9,200.00) Credit:

Seller Debit: Credit:

Include	Property	Buyer Debit	Buyer Credit
<input checked="" type="checkbox"/>	123 Main Street, Troy, MI 48084	(\$9,200.00)	
<input type="checkbox"/>	124 Main Street, Troy, MI 48084		
<input type="checkbox"/>	125 Main Street, Troy, MI 48084		

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

Details | Payors | Payees

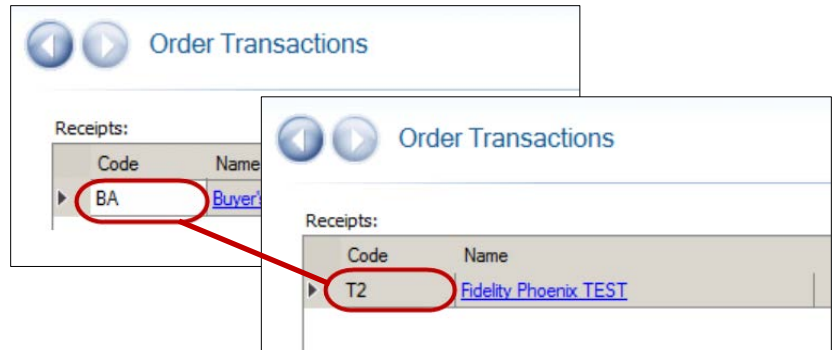
Code	Name	Amount	POC	Disburse POC	For	Process As	Bill Code
T	Chicago Phoenix TEST	\$9,200.00	<input type="checkbox"/>	<input type="checkbox"/>	B	Reduce Funds	NBE

Processing a Title Only Order

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

Before

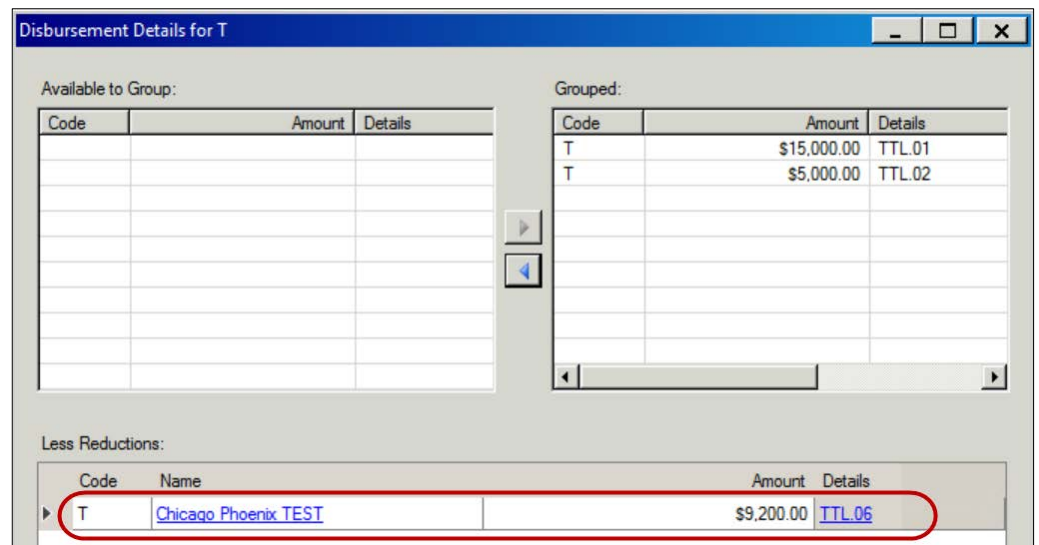
After



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

Disbursements:				
Code	Name	Amount	Held	Details
T	Chicago Phoenix TEST	\$10,800.00	<input type="checkbox"/>	Group...
A	Fidelity National Title Insurance Company	\$9,282.00	<input type="checkbox"/>	Group...
A2	Fidelity National Title Insurance Company	\$18.00	<input type="checkbox"/>	RC.01
G	Oakland County Register of Deeds	\$200.00	<input type="checkbox"/>	RC.01

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)

Transactions Notes (0)					
+ - Print and Post ! Actions Reports Order Transactions Anticipated Wires					
Status	Type	Ref. Number	Trans. Date	Amount	Payee/Payor
Receipts					
Pending	Receipt			\$4,050.00	Fidelity Phoenix TEST
Disbursements					
Pending	Check			\$400.00	Miami County, Ohio Auditor
Pending	Ledger Transfer(-)			\$3,650.00	Fidelity National Title Insurance ...

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)

