

# Impact/SQL - The Order Desk Module, version 7.7

10/28/2011

The Impact/SQL Order Desk module is used to simplify the order entry process for “Title Only” orders. The Order Desk module presents the user with a consolidated set of data entry screens for rapidly opening an order and entering sufficient data to get the title order submitted. The Order Desk user will select the branch of the file being opened, and will be able to open files in any branch with the Impact “branch type” of Escrow, but would typically only be opening files in “Title Only” branches.

The use of the Order Desk module requires that a user have Impact Password initials with the Access Level of Order Desk.

## Order Desk

When the module is first opened, the user is presented with the screen shown below. The screen is comprised of three tabs of data-entry fields and is used to enter all of the data required to place a title order. The data entered is a limited set of the data typically entered via the Initial Questions screens of the Escrow module. The screens have been consolidated, in Order Desk, to speed file opening and to limit the data entry to that required for a “title only” order. If there are mandatory fields set for the database for fields on these screens, they will be enforced in Order Desk. Data required that cannot be entered via Order Desk would be entered via the Escrow or Title modules (depending on the user’s access level and system configuration).

The screenshot displays the 'Order Desk - USA Digital Solutions, Inc.' application window. It features three main tabs: 'Order Info', 'Source/Bill To', and 'Distribution'. The 'Order Info' tab is currently active and contains several sections of data entry fields:

- File Type:** Radio buttons for 'Residential' (selected) and 'Commercial'.
- Order Type:** A dropdown menu set to 'Escrow & Title'.
- Escrow Officer:** A dropdown menu.
- Bank:** A text input field.
- Marketing Rep #1-4:** Four dropdown menus, all set to 'None'.
- Title Officer:** A dropdown menu.
- Type of Transaction:** A dropdown menu.
- Underwriter:** A dropdown menu.
- Premium Rate:** A dropdown menu.
- Sales Price:** A text input field.
- Loan Information:** Fields for Lender, Amount, Lender 2, Amount, and Broker, each with a search button.
- Buyer:** Name and Address fields with search buttons.
- Seller/Owner:** Name and Address fields with search buttons.
- Listing/Selling Agents:** Listing, Selling, and Other fields with search buttons.

The right side of the window contains:

- Property Information:** Fields for Property Type, Address, Address 2, City, State, Zip, County, APN, Subdivision, Unit, Low Lot, High Lot, Block, Tract, Map Book, and Map Page.
- Escrow Company:** Fields for Name, Attention To, Address #1, Address #2, City, State, Zip, Phone Number, Fax, Cell Phone, Email Address, and Ref Number.
- Comments to Title:** A large text area for notes.

At the bottom right, there are 'Cancel' and 'OK' buttons.

The user can move from tab to tab by clicking on the tab or by using the ALT-I (Order Info), ALT-S (Source/Bill To) and ALT-D (Distribution) hot keys (look for underlined letters for ALT hot keys, in Impact; ie: File – use ALT-F to open the File menu). Navigation from one field to the next is done with the TAB key.

The "Cancel" button, at the bottom of the screen is used to clear ALL of the entered data, without saving any and without a file being created.

The "OK" button, at the bottom of the screen is used to accept all of the entered data and trigger the routines to 1) create the file and, 2) submit the order to Title.

The "Cancel" and "OK" buttons are presented on all three tabs. The "OK" button would normally only be used once the user has entered data on all three tabs.

The "X" in the upper right corner of the screen is used to close the Order Desk module.

## ***ORDER INFO***

The Order Info tab contains the bulk of the data entry fields. The first section of the Order Info tab, in the upper left quadrant, deals with basic internal information classifying the file.

The first decision the user must make is whether the file they are opening is to be in the traditional Impact file format (now called Residential) or if it will be a file in the new Commercial format (no HUD, multiple properties and unlimited parties). This choice is made with the File Type radio button at the top of the left side of the screen. "Residential" is the default, and for the vast majority of files would be the appropriate selection.

The Order Type field is next, and has three options: "Escrow & Title", "Escrow Only" and "Title Only". The selection made drives NO behavior, it is simply a categorizing field used to help identify the nature of the transaction, and can be utilized as such in management reporting. In a typical Order Desk environment, the bulk of the files would likely be "Title Only" files.

The Escrow Branch of the file is then selected. All branches of Impact "branch type" of "Escrow" will be listed. The user must select the correct branch for the file being created. Normally, this would be a branch set up for Title Only files. However, if the Order Desk user is setting up files on behalf of internal escrow, they would select the appropriate branch from the dropdown list.

Once the Escrow Branch is selected, and the user tabs out of that field, the default bank for the branch (if any, or the first available if no default is set) will fill the Bank field. If there is more than one bank available to the Branch and the default is not the right bank for the file, then the dropdown arrow should be used to select the correct bank for the file.

The Escrow Officer is then selected. If there is a default EO (Manager) on the Branch setup screen, that person will be defaulted in this field.

There are either two or four Marketing Rep fields presented, depending on database configuration. Again, dropdowns are used to select the reps as appropriate.

The Title Officer to be assigned to the file, if known, is selected from the TO dropdown.

The Type of Transaction is selected, also from a dropdown list.

The Underwriter is selected next. The database, or branch, default will be pre-selected, if any.

The product set being "sold" is selected in the Premium Rate field, with the dropdown. These may vary by Underwriter.

Finally, the Sales Price can be entered. Commas cannot be used, but a decimal should be entered before any penny amount.

## Loan Information

The next section, on the left side of the screen, is the Loan Information section. There is room to enter information on two lenders and loans, and details on a Mortgage Broker.

The user has two choices for entering data here: enter the Lender and Amount directly into the two fields presented for each lender/loan (the NAF can be used for the Lender Name) OR, click on the ellipse (...) button after the Lender or Lender 2 fields. Clicking on the ellipse (...) button will bring up the Lender Details screen, shown below.

Again, the NAF can be used, when the cursor is in the Name field. All fields that have data in the NAF will be filled, when a party is selected from the NAF, whether on the Lender Details screen or the Lender field on the main Order Info screen.

**Lender Details**

Naf

Name:  Loan Amount:

Attention to:  Loan Number:

Address:  E-mail:

Address 2:  Ref Number:

City:  State:  Zip:

Phone Number:  Fax:

Cell Phone:

Type of Loan:

Type of Financing:

The third “lender”, is labeled Broker and is used to enter information on the Mortgage Broker.

**Lender Details**

Naf

Name:  Loan Number:

Attention to:  E-mail:

Address:  Ref Number:

Address 2:

City:  State:  Zip:

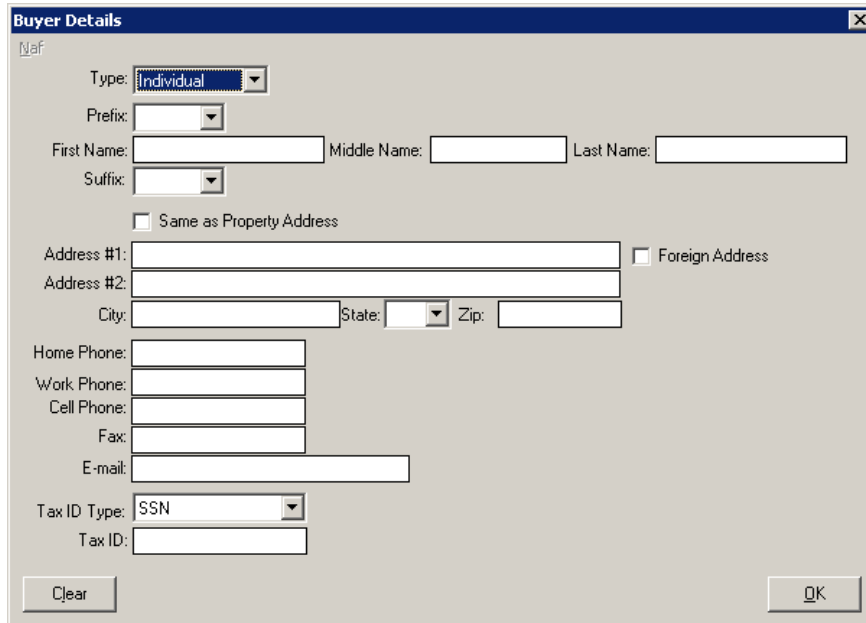
Phone Number:  Fax:

Cell Phone:

The “Clear” button is used to wipe out all data on the Lender Details screen. This is so the user can quickly delete all information on a party.

## Buyer

Below the Loan Information section, there are fields for the names of two buyers. Data cannot be entered directly into the Name fields shown on the Order Info tab. The user must click on the ellipse (...) button to bring up the Buyer Details screen, into which data is entered. The NAF will be enabled when the party being entered is a "Company" entry (not an Individual). The name entered on this screen will present on the Order Info tab, when this screen is closed.

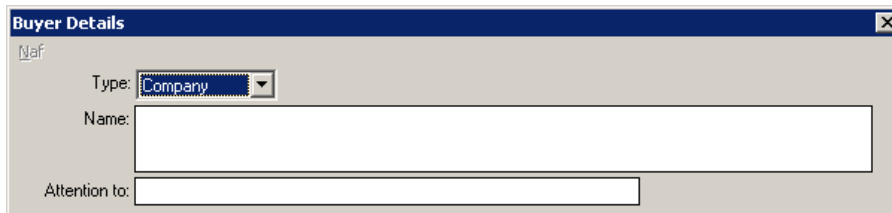


The screenshot shows the "Buyer Details" dialog box with the "Type" dropdown set to "Individual". The form includes the following fields:

- Type: Individual (dropdown)
- Prefix: (dropdown)
- First Name: (text box)
- Middle Name: (text box)
- Last Name: (text box)
- Suffix: (dropdown)
- Same as Property Address
- Address #1: (text box)
- Address #2: (text box)
- City: (text box)
- State: (dropdown)
- Zip: (text box)
- Home Phone: (text box)
- Work Phone: (text box)
- Cell Phone: (text box)
- Fax: (text box)
- E-mail: (text box)
- Tax ID Type: SSN (dropdown)
- Tax ID: (text box)
- Foreign Address

Buttons for "Clear" and "OK" are located at the bottom of the dialog.

The Type field, at the top of the screen, is used to identify if the party is an individual or not. When "Individual" is selected, the name fields present as shown above. When "Company" is selected, the name fields are modified to reflect a free-form "Name" text box, that will accept up to 250 characters, and an "Attention to" field, as shown below.



The screenshot shows the "Buyer Details" dialog box with the "Type" dropdown set to "Company". The form includes the following fields:

- Type: Company (dropdown)
- Name: (large text box)
- Attention to: (text box)

Clicking on the checkbox in front of the "Same as Property Address" label will link the property address to the buyer. If this box is checked, the Foreign Address checkbox is disabled, as, currently, the property address cannot be a foreign address.

The "Foreign Address" checkbox will convert the "City", "State" and "Zip" fields into one "Location" field.

The appropriate flag for the type of tax identification number being entered should be selected from the Tax ID Type dropdown (TIN, SSN or EIN). The entry of the tax id number should be nine (9) digits only, no hyphen(s) should be entered; the system will apply the appropriate hyphenation based on the Tax ID Type selected.

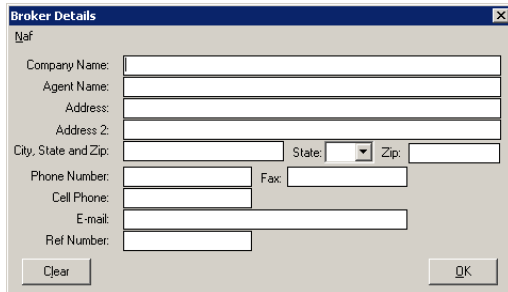
The "Clear" button is used to wipe out all data on the Buyer Details screen. This is so the user can quickly delete all information on a party.

## **Seller**

The seller name fields, below the Buyer section, act in the same manner as the buyer name fields described previously, so will not be described in detail here. Please see the Buyer discussion above.

## **Listing/Selling Agents**

There are fields provided to enter data on the Listing, Selling and Other Broker Agents. Unlike the Buyer and Seller sections, the NAF can be used if the cursor is in the Listing, Selling or Other fields, on the Order Info tab. The ellipse (...) buttons are used to get to the data entry screens.



The screenshot shows a window titled "Broker Details" with a "Naf" label. It contains several input fields: Company Name, Agent Name, Address, Address 2, City, State and Zip (with a dropdown for State and a Zip field), Phone Number, Cell Phone, E-mail, and Ref Number. There are also "Clear" and "OK" buttons at the bottom.

On the Broker Details screen, the NAF is available when the cursor is in the Company Name field. It is strongly recommended that the NAF be utilized to populate the fields on this screen.

The Reference Number field, for this specific transaction, would likely be the only field that would have to be manually entered, if the NAF were used to populate the broker agent information.

The "Clear" button is used to wipe out all data on the Broker Details screen. This is so the user can quickly delete all information on a party.

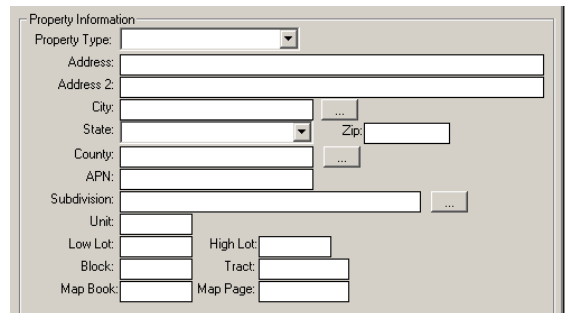
## **Property Information**

The property information is entered in the upper right quadrant of the Order Info screen.

The Property Type dropdown is used to select the appropriate type for the transaction. The listing presented will be that defined in the database.

The State and County fields will default to the information on the branch setup screen, if any, for the branch selected for the file.

The balance of the property information should be entered with as much detail as is available, with the address information in the fields at the top half of the section and the components of the legal definition of the property at the bottom of the section.



The screenshot shows a "Property Information" section with a dropdown for "Property Type". Below it are fields for Address, Address 2, City, State (with a dropdown), Zip, County, APN, Subdivision, Unit, Low Lot, High Lot, Block, Tract, Map Book, and Map Page. Ellipse (...) buttons are present next to the City, Zip, Subdivision, and Unit fields.

Should the Address field entry match an existing file's property address, a pop-up will present that shows the user information about the existing file, so a determination can be made if the order being entered is a duplicate.

## **Escrow Company**

The Escrow Company section of the Order Info tab is used to enter details on the outside escrow company involved in the transaction. Again, the NAF can be used, and it is recommended that it is used, to complete the bulk of the information for the outside escrow company. This information will flow to a party of the "Other Party" type in the file (when viewed through the Escrow module). The Ref Number field is used for the outside escrow company's escrow file number.

## Comments to Title

The final section of the Order Info tab is the Comments to Title field. This text box can be used to enter any additional information that might be of interest to Title when receiving the order.

## Source/Bill To

Click on the Source/Bill To tab, or use the ALT-S hot key combination, to present this tab.

The Source/Bill To tab is made up of two sections. The left side of the screen is where details on the Source of Business is entered, and the right is for the Bill to Customer. By default, the Escrow Company (outside escrow entered on the Order Info tab) is the Source of Business, and the Source of Business is the default for the Bill to Customer. If these defaults are valid, no additional data entry is required on this screen.

The screenshot shows the 'Source/Bill To' tab in the Order Desk software. The window title is 'Order Desk - USA Digital Solutions, Inc.' and the menu bar includes 'File' and 'Help'. The interface is divided into three tabs: 'Order Info', 'Source/Bill To', and 'Distribution'. The 'Source/Bill To' tab is active and contains two main sections: 'Source of Business' on the left and 'Bill to Customer' on the right. Each section has a set of radio buttons for selection and a corresponding set of text input fields for company name, attention to, address, city, state, zip, phone number, fax, cell number, email address, and ref number. The 'Escrow Company' radio button is selected under 'Source of Business', and the 'Source of Business' radio button is selected under 'Bill to Customer'.

The radio buttons at the top of each section are used to identify if a party entered on the Order Info tab should be selected as the Source of Business and/or Bill to Customer. If none of the previously entered parties should be selected, the user should click on the "Other" radio button to open up the fields for manual data entry. Whatever data had been pulled to the fields, by the default selection, will remain and can be cleared and overtyped, or edited, as needed.

## Distribution

Click on the Distribution tab, or use the ALT-D hot key combination to present this tab.

The Distribution tab is used to identify how many copies of the Pre, CC&Rs and Other Documents are to be provided to the selected parties, and the means of delivery. No action in Impact is triggered by these entries; the entries are informational only as a reminder of the desired delivery of materials to parties to the file.

The “Via” column is used to select the delivery mechanism, and the options are database-specific. The parties that have been entered on the previous screens will be identified on the right side of the screen next to their party type. The “Applicant” is the Source of Business entry from the prior screen. The Number of Copies of each document to be delivered is identified in the columns under the doc type headers.

If there are other parties that are to receive copies of the documents, they can be identified in the three bottom sets of fields.

Via	Pre	CC&R	Doc
Driver	1		
Driver	2		

## Submit Order

The “OK” button, at the bottom of the screen, is used to submit the file to Impact, creating a file in the branch selected.

Submit Order

Do you want to submit this order to IMPACT?

Yes No

When the “OK” button is clicked on, the Submit Order box to the left will present. If the user is sure that the data is as complete as can be at that time, and the transaction should be set up in Impact as a new file, he/she should click on the “Yes” button. If they are not sure, and wish to return to the data entry tabs, then the “No” button should be clicked on. The file number will be assigned

automatically.

If the database is configured to publish files to SmartVIEW, the file will be published once the file number is assigned.

Then, if multiple title branches are configured for, the user will be prompted to select the title branch to send the order to; otherwise, they will be prompted as to whether the order should be sent to the Title Department, with a screen like the one shown to the right.

Order Title Search

This will send Escrow Number 00000324 to the Title Department to begin your title search.

Yes No

Order Title Search

Your request has been accepted. Do you wish to print the Title Instructions?

Yes No

With an affirmative response, the user will be given a notice like that shown to the left. With a negative response, the file will still be created but the order will not have been sent to Title – and that would have to be done from Escrow, at some time in the future.

The user will then be presented with a blank set of tabs, for entry of the next order.