

ORDER DESK MANUAL

Impact/SQL

Version 10.5.431.NET

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Impact/SQL Version 10.5.0

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Introduction to Impact/SQL Order Desk

The Impact/SQL **Order Desk** module is used to simplify the order entry process, generally for “Title Only” orders. The files are created as Escrow files (as opposed to Direct Order files), most often in “Title Only” Escrow-type branches. The Order Desk module presents the user with a consolidated set of data entry tabs 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 User initials with the Access Level of “Order Desk w/ Title & Escrow” or “Order Desk Only”.

General Information and Helpful Hints

Before discussing the system functionality in detail, there are some general features that you should be aware of. These are discussed below.

Some formatting conventions used in this manual are:

When you need to press the Enter key, you will see ENTER in this manual.

When you see text displayed on a menu or window such as the words “OK” or “Cancel”, you will see **OK** or **Cancel** in this manual.

Quick Keys


In the Impact/SQL Utilities module, as in other Impact/SQL modules, there are opportunities to move through the options available without using the mouse. Most menu items contain an underlined letter. If you hold down the ALT key and press the underlined letter of the option list you want displayed, the menu will drop down.

ALT+S will initiate the **Submit to Impact** and then to Title routine;

ALT+B will bring up the **Source/Bill To** tab;

ALT+D will bring up the **Distribution** tab.

Closing Impact/SQL Order Desk

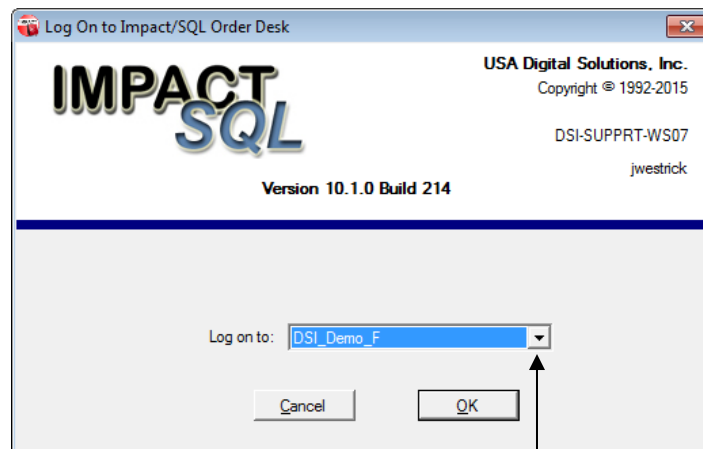
As with most Windows applications, you can close the Impact/SQL Order Desk module by clicking  in the upper-right hand corner of the Order Desk desktop. In Order Desk, this action will immediately close the module and any entered data that has not been submitted will be lost. Be sure to have clicked on **Save** to Save and Submit to Title on the last order before closing the module.

Logon

Access to the Impact Order Desk module (as to all Impact modules), is controlled by a user-rights table, and administered by a limited set of user initials that have sufficient authority granted to them. This is a very important control, and should be carefully managed. Depending on the nature of the rights assigned to a user, they will have access to various pieces of the overall Impact suite, but generally not complete access. This functionality helps reinforce audit controls, and needs to be considered in conjunction with the network security plan.

The system can be configured to require a logon routine, each time the user opens an Impact module, or it can be configured to provide for an automatic logon utilizing the NT user name. By providing for an automatic logon utilizing the NT user name, control over the access to the application is very flexible: both the system administrator and the rights table within Impact can control access. The system administrator can control access by disabling the user's NT user name, a likely event in the case of an employee's departure. In addition, the user name can be disabled within Impact Utilities – which will only affect the user's ability to access Impact modules. This would be done if the user is still using the rest of the network, but should no longer be accessing Impact.

If the system is configured for NT Authentication, and more than one database is available, a screen like that shown below will be presented, after the user double-clicks on the Impact Order Desk icon on their desktop.



Use the drop-down list arrow to access other databases, if available.

When configured to require a logon step, the user will be identified within the system by their initials (three maximum), and will be given a password.

Enter your user initials in the first field, and then TAB to the **Password** field. Enter your password and, if the correct database is identified in the **Log on to:** field, click **OK**. If the database is not correct, then TAB to the **Log on to:** field and select the correct database by clicking on the drop-down list arrow and highlighting a database name; then click **OK**. Most users will only have one database available.

Alternatively, if you do not want to use the mouse to click **OK**, you can press the TAB key until **OK** is highlighted, and then press ENTER.

NOTE: When you enter your password, it will not display on the screen, but will be represented by a series of asterisks "****".

If you don't want to continue, click **Cancel** instead. This will cause the **Log On to Impact/SQL Order Desk** dialog box to close and the Impact Order Desk module will not be opened.

KEEP YOUR PASSWORD PRIVATE. You should not share your password or log on to the system and then let someone else operate under that session. Access to the Order Desk module should be severely limited.

If you forget your password, the administrator of the Impact application must assign a new one.

There are two user levels that provide access to the Impact Order Desk module:

Order Desk w/ Escrow and Title

Order Desk Only

The Impact/SQL Order Desk Desktop

Impact Order Desk Desktop

When the **Order Desk** 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 shows the Order Desk software interface with three tabs: **Order Info**, **Source/Bill To**, and **Distribution**. The **Order Info** tab is active and contains the following fields:

- File Type:** Residential (dropdown)
- Order Type:** Escrow & Title (dropdown)
- Escrow Branch:** (dropdown, highlighted green)
- Escrow Officer:** (dropdown, highlighted green)
- Bank:** (dropdown)
- Marketing Rep:** (dropdown)
- Marketing Rep #2:** (dropdown) **Percentage:** (text box)
- Marketing Rep #3:** (dropdown) **Percentage:** (text box)
- Marketing Rep #4:** (dropdown) **Percentage:** (text box)
- Title Officer:** (dropdown)
- Type of Transaction:** (dropdown, highlighted green) Cash Sale
- Underwriter:** (dropdown)
- Premium Rate:** (dropdown)
- Sales Price:** (text box)
- Loan Information:**
 - Lender #1:** (text box)
 - Amount:** (text box)
 - Lender #2:** (text box)
 - Amount:** (text box)
 - Broker:** (text box)
- Buyers:**
 - Name #1:** (text box)
 - Name #2:** (text box)
- Sellers/Owners:**
 - Name #1:** (text box)
 - Name #2:** (text box)
- Agents:**
 - Listing:** (text box)
 - Selling:** (text box)
 - Other:** (text box)

The **Property Information** section on the right includes:

- Property Type:** (dropdown)
- Address #1:** (text box)
- Address #2:** (text box)
- City:** (text box)
- State:** (dropdown) **Zip Code:** (text box)
- County:** (text box)
- APN:** (text box)
- Subdivision:** (text box)
- Unit:** (text box)
- Low Lot:** (text box) **High Lot:** (text box)
- Block:** (text box) **Tract:** (text box)
- Map Book:** (text box) **Map Page:** (text box)


The **Escrow Company** section includes:


- Name:** (text box)
- Attention To:** (text box)
- Address #1:** (text box)
- Address #2:** (text box)
- City:** (text box)
- State:** (dropdown) **Zip Code:** (text box)
- Work Number:** (text box) **Ext:** (text box)
- Cell Number:** (text box) **Fax Number:** (text box)
- Email:** (text box)
- Reference Number:** (text box)


The **Comments to Title** section is a large text area at the bottom.


The user can move from tab to tab by clicking on the tab heading or by using the ALT-I (**Order Info**), ALT-B (**Source/Bill To**) and ALT-D (**Distribution**). Navigation from one field to the next is done with the TAB key.

Mandatory fields will have a green background until completed.

The  **Save** icon is used to submit the order to Impact to create a file and, subsequently, to submit the order to Title.

The  **Import File** icon is used to copy data from a Master File, to speed entry of a standardized order. The user is prompted for the file number and whether to include Settlement Information (HUD data).

The  **Clear Form** icon is used to clear out all data currently on the three Order Desk tabs.

The  **NAF** icon will be available when the cursor is in a name field. Pulling entries from the NAF is advisable, whenever possible.

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.

File Information

The first decision the user must make is whether the file they are opening is to be in the traditional Impact file **Residential** file format or if it will be a **Commercial** file (Commercial files have no HUD, multiple properties and unlimited parties). This choice is made with the **File Type** dropdown 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. If "Commercial" is selected, once the order is completed and submitted, the **File Type** setting will reset to "Residential" for the next order.

If "Residential" is the selected File Type, the underlying **Data Entry Type**, for Escrow, will be assigned based on the setting of a Setup Option, set by the System Administrator, in the Utilities module. Those options are HUD, Worksheet, HUD w/ GFE, Worksheet w/ GFE, and CDF (Closing Disclosure Form). The Order Desk user will not see the data entry type; it is established in the background, based on the Setup Option selection.

The **Order Type** field is next, and has three options: "**Escrow & Title**", "**Escrow Only**" and "**Title Only**". The selection is 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. If "Escrow Only" is selected, the user will not be asked whether the order should be submitted to Title, once the order is submitted to Impact for file creation.

The **Escrow Branch** of the file is then selected. All branches with an 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.

The **Escrow Officer** is then selected. All Escrow Officers assigned to the selected Branch will be presented in the dropdown. If there is a default Escrow Officer (Manager) on the Branch setup screen, that person will be defaulted in this field.

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.

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 **Percentage** fields next to the Marketing Rep #2 (and #3 & #4, if enabled), are used to identify the split amongst the Marketing Reps. Marketing Rep #1 receives the balance not assigned to the other rep(s).

The **Title Officer** to be assigned to the file, if known, is selected from the Title Officer dropdown. If configured for multiple title plants, and the Title Officers are assigned to individual plants, the selection of the Title Officer will drive the plant to which the order is submitted.

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

The **Cash Sale** checkbox, to the right of the **Type of Transaction** field, will be enabled if the transaction type selected is not flagged as a refinance type and if a loan **Finance Type** of **New** or **Refinance** is not selected, on the Loan Information screen.

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.

Tabbing out of the Sales Price field will take the user to the **Property Information** section of the form.

Property Information

The **Property Information** section is in the upper right quadrant of the **Order Info** screen.

Information can only be entered on one property, even if the Commercial File Type is selected. On Commercial files with multiple properties, the additional properties would need to be added through the Escrow module. It would be very unusual to have multiple-property Commercial files started through an Order Desk.

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 for the branch selected for the file, unless the Setup Option relating to that behavior is disabled.

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 brief legal definition of the property at the bottom of the section.

The screenshot shows a form titled "Property Information" with the following fields and values:

- Property Type: 1 - 1-4 Family Residential (dropdown)
- Address #1: 112
- Address #2: (empty)
- City: (empty)
- State: CA (dropdown)
- Zip Code: (empty)
- County: Alameda
- APN: (empty)
- Subdivision: (empty)
- Unit: (empty)
- Low Lot: (empty)
- High Lot: (empty)
- Block: (empty)
- Tract: (empty)
- Map Book: (empty)
- Map Page: (empty)

Should the **Address #1** or **APN** field entry exactly match an existing file’s property address or APN, 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. A system Setup Option can be used to apply this check to only open files (excluding testing against closed or cancelled files).

Tabbing out of the **Map Page** field will take the user to the **Loan Information** section.

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(s)** and **Amount(s)** 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 #1** 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 #1** (or **Lender #2** or **Broker**) field on the main **Order Info** screen. The **Proposed Insured Clause** field will be populated from the NAF, if entered there. Otherwise, it can be manually filled.

The screenshot shows a window titled "Lender #1 Details". At the top left is a "Clear Form" icon. The form contains the following fields:

- Name: [text box]
- Attention To: [text box]
- Address #1: [text box]
- Address #2: [text box]
- City: [text box]
- State: [dropdown menu]
- Zip Code: [text box]
- Work Number: [text box]
- Ext: [text box]
- Fax Number: [text box]
- Cell Number: [text box]
- Email: [text box]
- Reference Number: [text box]
- Loan Information section:
 - Loan Number: [text box]
 - Loan Amount: [text box]
 - Type of Financing: [dropdown menu, currently set to "None"]
 - Type of Loan: [dropdown menu, currently set to "None"]
- Proposed Insured Clause: [text area]

At the bottom of the form are three buttons: "Remove", "Cancel", and "OK". A "NAF" icon is located in the top right corner of the form area.

The third "lender", is labeled **Broker**, on the Order Info tab, and is used to enter information on the **Mortgage Broker**. The Lender #3 screen is the same as that shown above, but the Loan Amount and Type of Financing fields are grayed out and cannot be used.

The  **Clear Form** icon, at the top left of the form, 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 if it was entered in error (or if the data came from a Master File and is not applicable to the new order, for example).

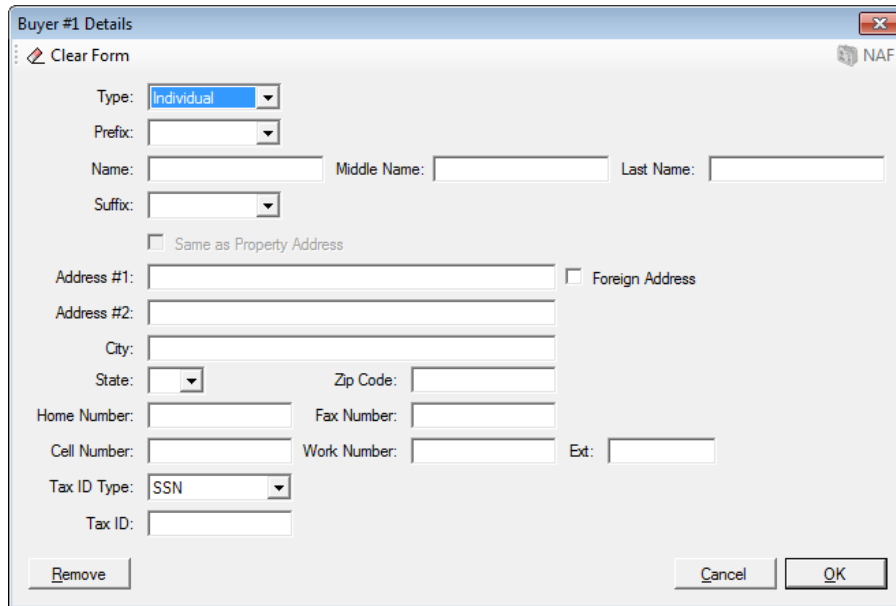
The **Remove** button, at the bottom left of the form, is used to eliminate the Lender information, and shut down the **Details** form, without any prompt about saving changes.

The **Cancel** button, at the bottom right of the form, is used to close the Details form without saving any changes made. The user will be prompted about saving changes if changes had been made.

The **OK** button, at the bottom right of the form, is used to save the Lender information and close the Details form.

Buyers

Below the Loan Information section, there are fields for the names of two **Buyers**. Data cannot be entered directly into the **Name #1 & #2** fields shown on the **Order Info** tab. The user must click on the ellipse (...) button to bring up the **Buyer #1 (or #2) Details** screen, into which data is entered. The **NAF** will be enabled when the party **Type** 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.

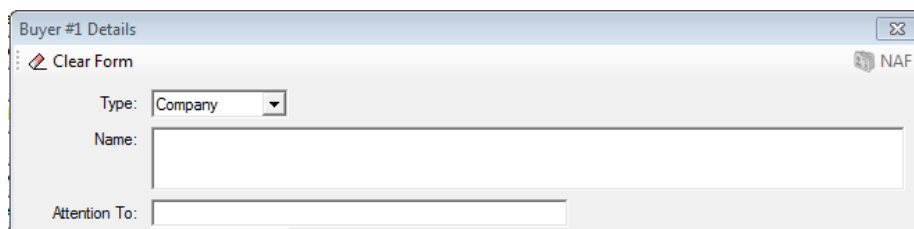


The screenshot shows the "Buyer #1 Details" window with the "Type" dropdown set to "Individual". The form includes the following fields and options:

- Type:** Individual (dropdown)
- Prefix:** (dropdown)
- Name:** (text box), **Middle Name:** (text box), **Last Name:** (text box)
- Suffix:** (dropdown)
- Same as Property Address
- Address #1:** (text box), Foreign Address
- Address #2:** (text box)
- City:** (text box)
- State:** (dropdown), **Zip Code:** (text box)
- Home Number:** (text box), **Fax Number:** (text box)
- Cell Number:** (text box), **Work Number:** (text box), **Ext:** (text box)
- Tax ID Type:** SSN (dropdown)
- Tax ID:** (text box)

Buttons at the bottom include "Remove", "Cancel", and "OK".

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, which will accept up to 250 characters, and an **Attention to** field, as shown below.



The screenshot shows the "Buyer #1 Details" window with the "Type" dropdown set to "Company". The form includes the following fields and options:


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

Buttons at the bottom include "Remove", "Cancel", and "OK".

Clicking on the checkbox in front of the **Same as Property Address** label will link the property address to the buyer. This checkbox will only be available if the **Property Information** has been entered already. The user, if tabbing through the fields, will be taken to the Property Information section before they get to the Buyers section. If this box is checked, the Property Information previously entered will fill the Address fields for the Buyer and 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, EIN or SSN). 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 Form** button, at the top left of the form, 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 if entered in error (or if the data came from a Master File and is not applicable to the new order, for example).

The **Remove** button, at the bottom left of the form, is used to eliminate the Buyer information, and shut down the **Details** form, without any prompt about saving changes.

The **Cancel** button, at the bottom right of the form, is used to close the Details form without saving any changes made. The user will be prompted about saving changes if changes had been made.

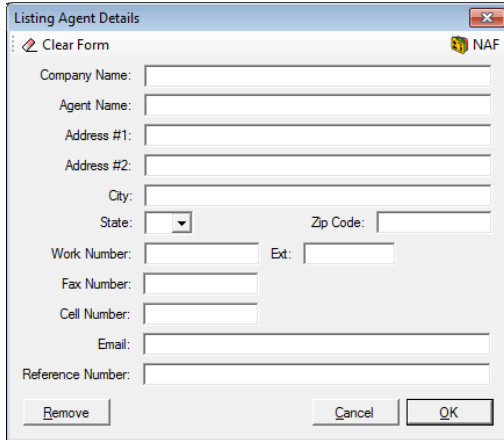
The **OK** button, at the bottom right of the form, is used to save the Buyer information and close the **Details** form.

Sellers/Owners

The **Seller Name #1 & #2** fields, below the Buyers section, act in the same manner as the Buyer Name fields described above. Please see the Buyer discussion above.

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 detail screens.



On the **Agent 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 Form** button, at the top left of the form, is used to wipe out all data on the Agent Details screen. This is so the user can quickly delete all information on a party if entered in error (or if the data came from a Master File and is not applicable to the new order, for example).

The **Remove** button, at the bottom left of the form, is used to eliminate the Agent information, and shut down the **Details** form, without any prompt about saving changes.

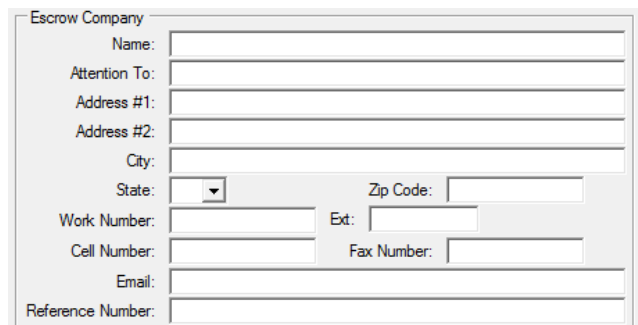
The **Cancel** button, at the bottom right of the form, is used to close the Details form without saving any changes made. The user will be prompted about saving changes if changes had been made.

The **OK** button, at the bottom right of the form, is used to save the Agent information and close the **Details** form.

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 be used, to complete the bulk of the information for the outside escrow company. This information will flow to the **“Other Party #1”** party in the file (when viewed through the Escrow module). There is a Setup Option that will establish a separate **“Escrow Company”** party type, as a sub-set of the Other Party party type; if it is used, the data entered here will be tagged as the Escrow Company party on the file.

The **Reference 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 value to Title when receiving the order.

Source/Bill To

Click on the **Source/Bill To** tab, or use the ALT-B 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** are entered, and the right is for the **Bill to Customer** information. There are Setup Options through which the default party selections for the Source of Business and Bill To Customer can be identified. Typically, the Source of Business is defaulted to the Escrow Company and the Bill To Customer is defaulted to come from the Source of Business; however, if the norm for your business is different, the available choices for the defaults are Other (open for manual entry), the Escrow Company, Selling, Listing or Other Brokers, or one of the three Lenders.

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. If data had been previously put in the fields, by selection of a radio button other than “Other”, whatever data had been pulled to the fields, by the selection, will remain and can be cleared and overtyped, or edited, as needed if the “Other” radio button is subsequently clicked.

BE CAREFUL: The  **Clear Form** at the top of the screen is NOT limited to this tab (contrary to the Clear Form icons on the Lenders, Buyers and Seller Detail forms). If used when on this tab, data on all three tabs will be cleared, without warning.

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 **Prelim, CC&Rs** and **Other Documents** are to be provided to the selected parties, and the means of delivery. There is a Setup Option that will add columns for the **Legal, Vesting** and **Plotted Easement** information. The only action in Impact that can be triggered by these entries is auto emailing of the prelim to outside parties, if the system is properly configured; otherwise, the entries are informational only as a reminder of the desired delivery method for the specified materials to parties to the file.

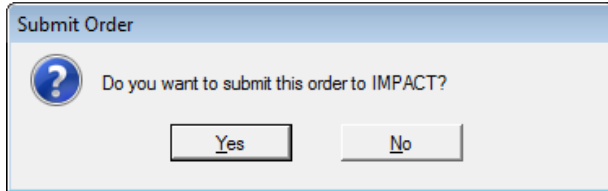
The **Via** column is used to select the delivery mechanism, and the options are database-specific. The parties that have been entered on the previous screens will be identified on the left side of the screen next to their party type. The **Number of Copies** of each document to be delivered is identified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


The screenshot shows the 'Distribution' tab in the Order Desk software. The window title is 'Order Desk: [USA Digital Solutions Demonstration System]'. The interface includes a menu bar with 'Save', 'Import File', and 'Clear Form'. Below the menu bar, there are tabs for 'Order Info' and 'Source/Bill To', with 'Distribution' being the active tab. The main area is divided into two sections: 'Order Info' on the left and a table on the right. The 'Order Info' section contains fields for 'Name', 'Listing Agent', 'Selling Agent', 'Other Agent', 'Lender #1: Bank of America (ABA)', 'Lender #2', 'Broker', 'Seller', 'Buyer', 'Source of Business: Bank of America (ABA)', and 'Escrow Company'. Below these are three sets of fields for 'Name', 'Address #1', 'Address #2', 'City, State, Zip', and 'Email'. The table on the right has columns for 'Via', 'Pres', 'CCRS', 'Docs', 'Lgl', 'Vst', and 'PE'. The 'Via' column has dropdown menus, and the 'Pres' column has a text input field. The 'CCRS', 'Docs', 'Lgl', 'Vst', and 'PE' columns are empty. The table contains two rows of data: the first row has 'Deliver' in the 'Via' column and '1' in the 'Pres' column; the second row has 'Deliver' in the 'Via' column and '2' in the 'Pres' column.

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

Save (Submit Order)

The  **Save** icon, at the top left of the Order Desk screen, is used to initiate the file creation process and, subsequently, to submit the order to the Title Department.

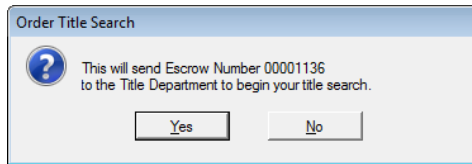
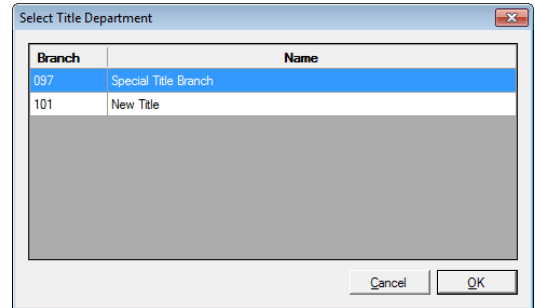


When the  **Save** icon is clicked on, the **Submit Order** box (shown to the left) will present. If the user is sure that the data is as complete as can be at that time, and the transaction should be set up in Impact as a new file, he/she should click on the "**Yes**" button. If they are not sure, and wish to

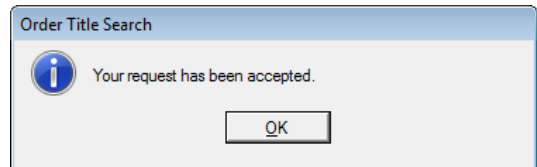
return to the data entry tabs, then the "**No**" button should be clicked on. The file number will be assigned automatically; there is no manual numbering for Order Desk-sourced files, even if enabled for Escrow.

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

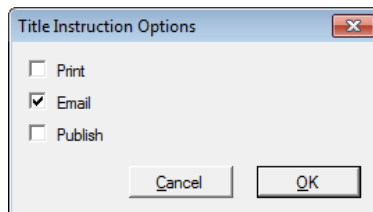
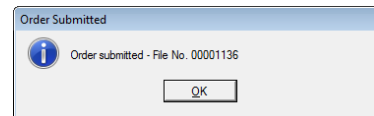
If multiple title branches are configured for, the user will be prompted to select the title branch to send the order to (screen shown to the right); then, they will be presented with the screen asking for final confirmation on sending the file (with the file number) to Title.



With an affirmative response, the user will be given a notice like that shown to the right, saying the order has been accepted by Title. 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.



A notice on the file being "submitted" to Escrow is then displayed.



Assuming the Setup Option has been enabled to prompt the user as to how the Title Instructions should be handled, the **Title Instruction Options** screen will present, as shown here (one or more of the three options may be pre-checked, depending on configuration). The user should select the option(s) desired and click on **OK** to proceed. Clicking on **Cancel** will skip the printing, emailing or publishing of Title Instructions.

Once the Title Instruction processing has been completed, the user will then be presented with a blank set of tabs, for entry of the next order.

Appendix A - Troubleshooting

USA Digital Solutions, Inc. (DSI) Support personnel may ask that you make a screen shot so that you can e-mail Support a “picture” of the screen as it appears when the error occurs.

To create this screen shot, save it and send it to the Support personnel, do the following:

Press the PRINT SCREEN key on the keyboard, which is usually located on the top row of the keyboard, and is usually the third key from the right.

Open your e-mail client, start a new e-mail, to Support@Digisolaz.com, and Paste the screen shot into the body of the e-mail. This will work if the e-mail format is HTML. If the screen shot does NOT paste properly, open a Word document and paste the screen shot into it; save the Word doc; and, attach it to an email addressed to Support@Digisolaz.com.

DSI Support personnel can be reached at (602) 866-8199 extension 2.



support@digisolaz.com

(602) 866-8199 x 2