Orders Gateway

User Guide
November 2020

For TitleWorkPlace (Agency) Users Only

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Introduction

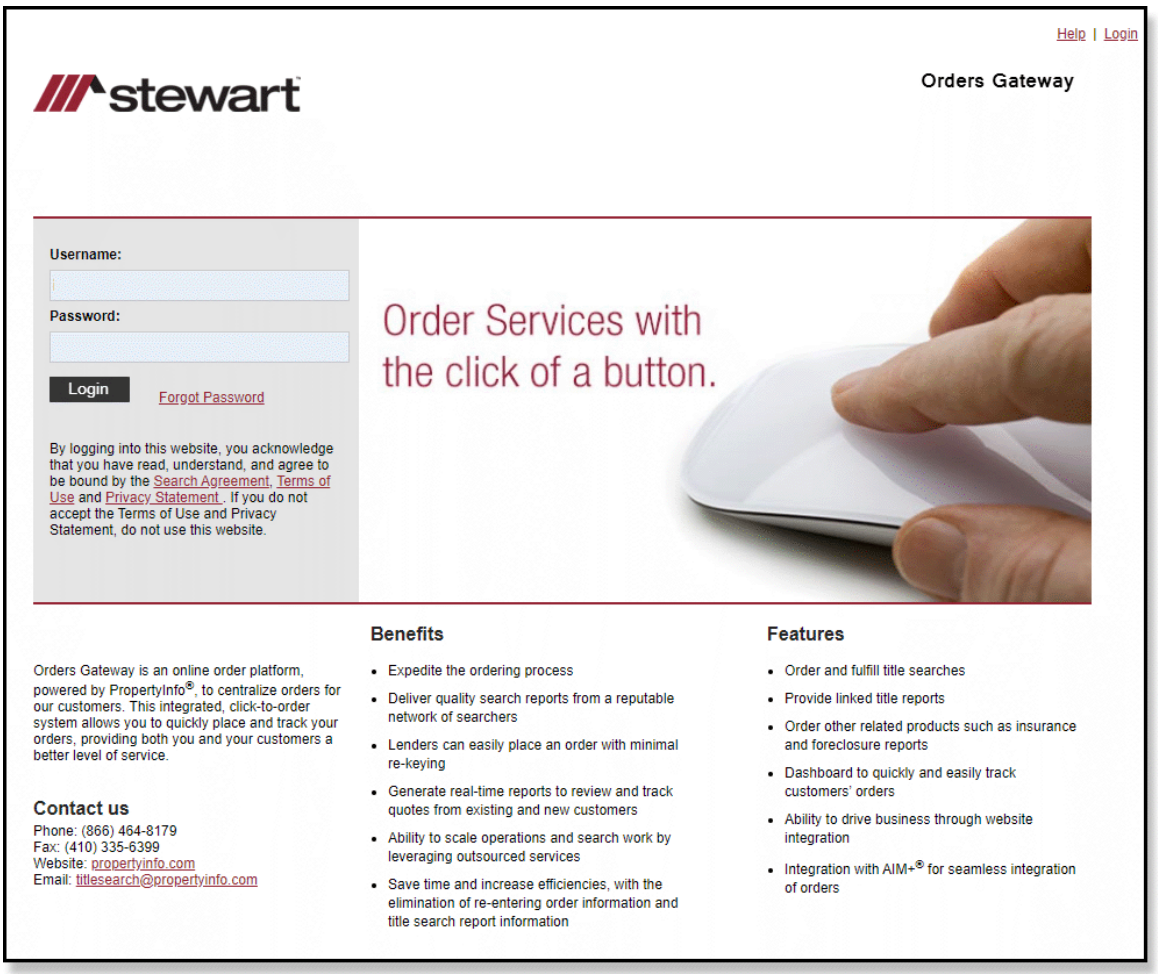
This document walks you through ordering a title search in **Orders Gateway**. Using **Orders Gateway**, you can order a title search, and then once the search is prepared, you can:

- Review the Raw Title Search
- Prepare Ancillary Documents
- Review the Title Search Report
- Prepare the Commitment

Logging In

You can log into Orders Gateway by either clicking the link emailed to you when a new order is received or by navigating to https://ordersgateway.com.

Use your login credentials to log in. Your screen should look like this:

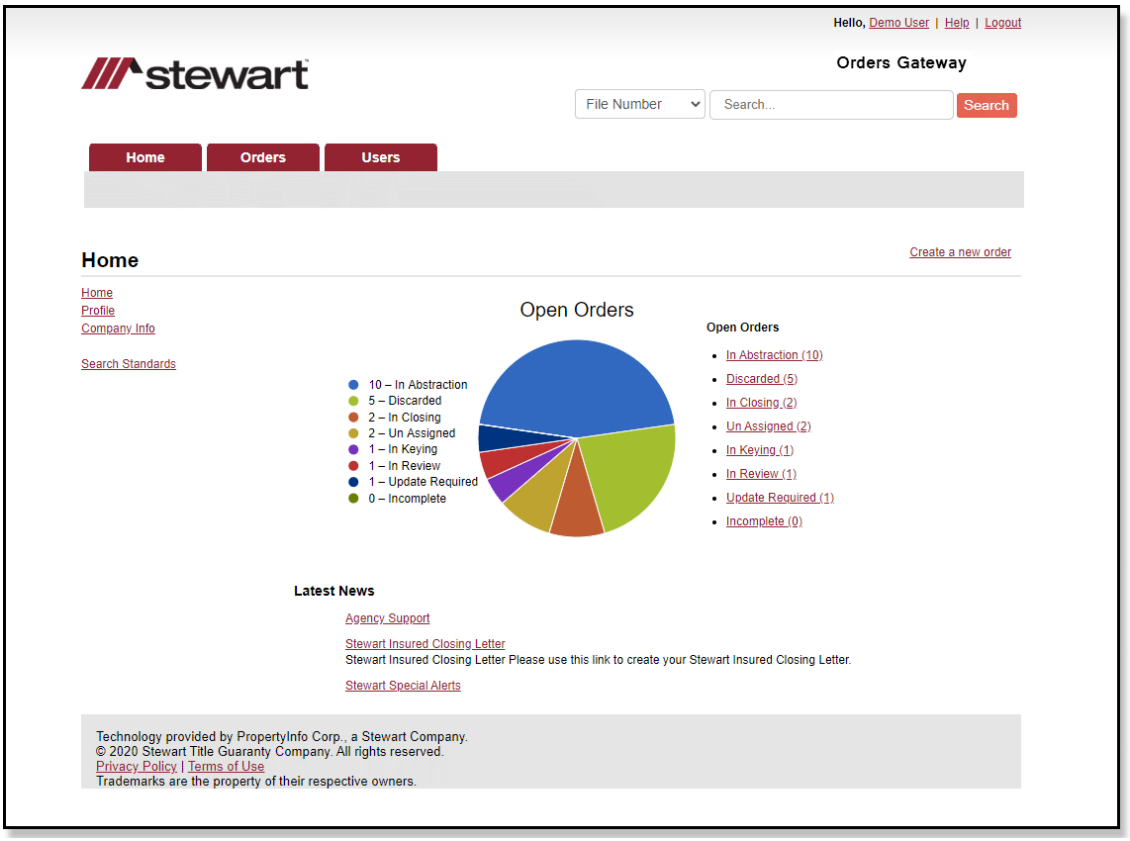


Navigating Orders Gateway

Once logged in, you can create new orders or view existing orders to complete the title search. Before using **Orders Gateway**, take some time to learn how to navigate through the various tabs and what options are available to you. When you log into **Orders Gateway** for the first time, notice three main tabs: *Home*, *Orders* and *Users*.

Using the Home Tab

Use the options within the *Home* tab to update your profile, company information, view state-specific search standards, access a coverage map detailing products, services and pricing available by location, and view open orders at-a-glance.

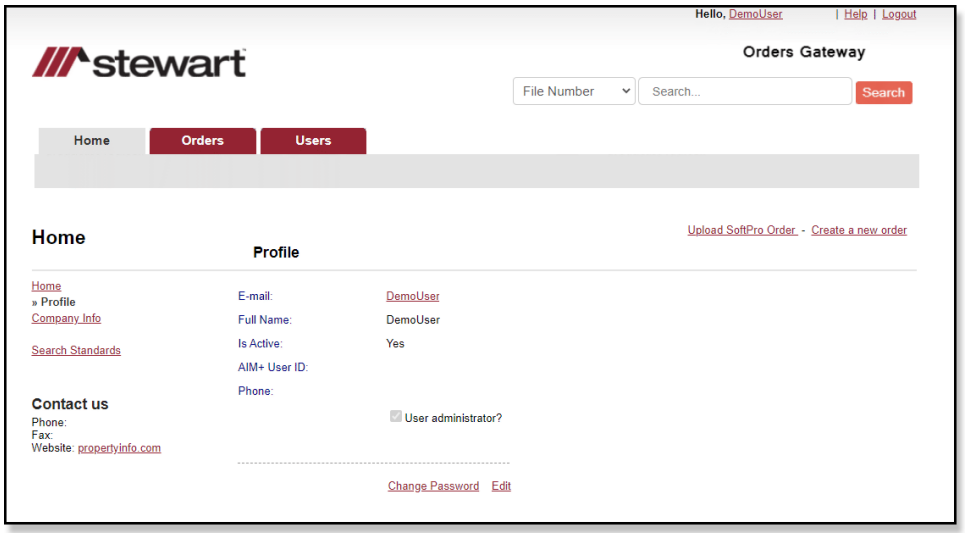


Updating Your Profile

Complete these steps to update your profile:

Steps

1. From the *Home* tab, locate the left menu and click **Profile**. The *Profile* screen displays.



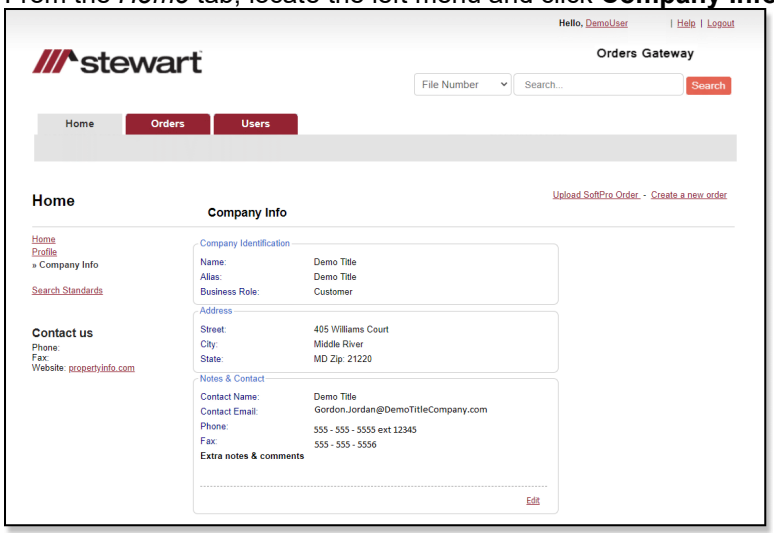
2. From this screen, you can:
   - Click **Change Password** to edit your password.
   - Click **Edit** to edit any additional profile information.

Updating Company Information

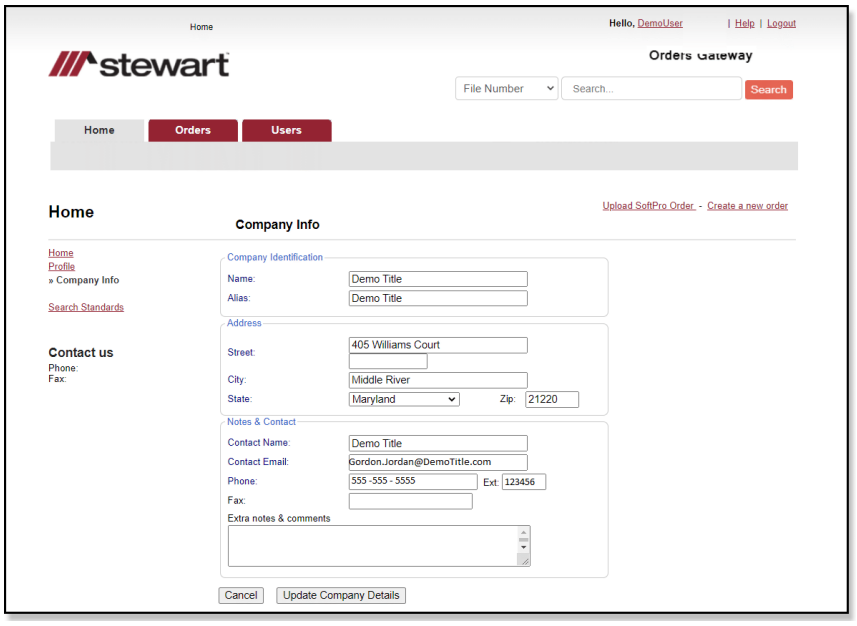
Complete these steps to update your company information:

Steps

1. From the *Home* tab, locate the left menu and click **Company Info**. The *Company Info* screen displays.



From this screen, you can view and edit company information. To edit, click **Edit**. The *Edit Company Info* screen displays.



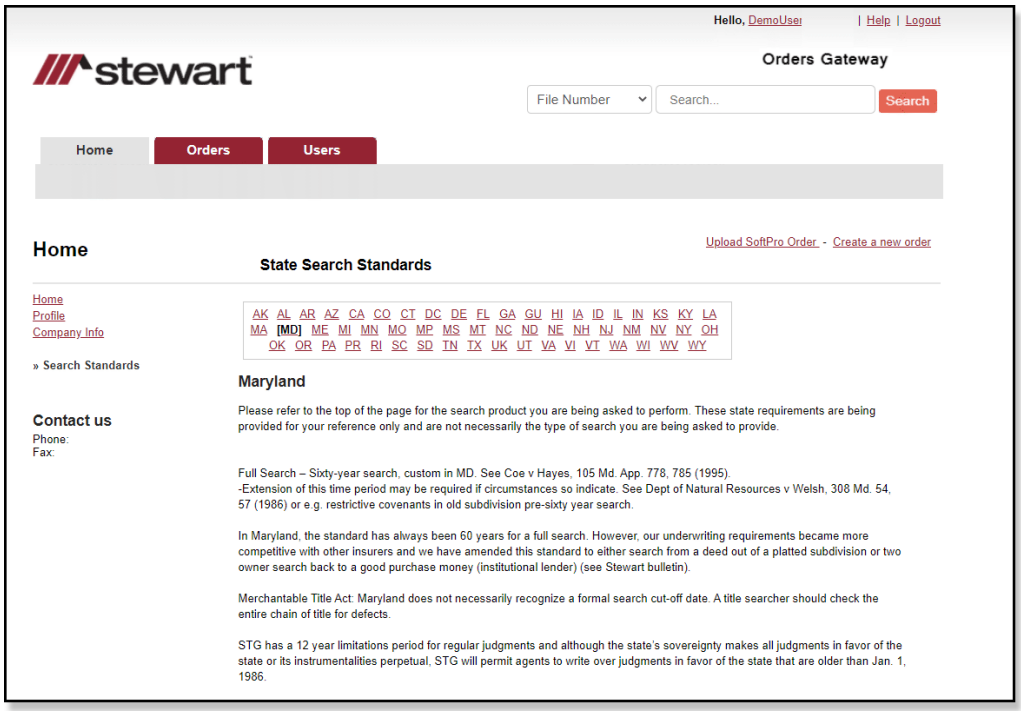
2. Make any necessary changes, and then click **Update Company Details** to save.

Viewing Search Standards

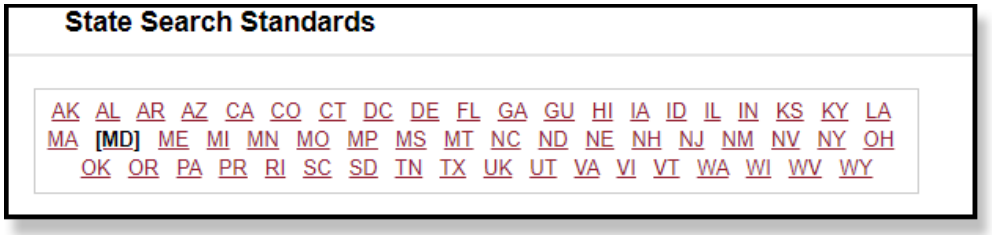
Complete these steps to view search standards by state:

Steps

1. From the *Home* tab, locate the left menu and click **Search Standards**. The *State Search Standards* screen displays.

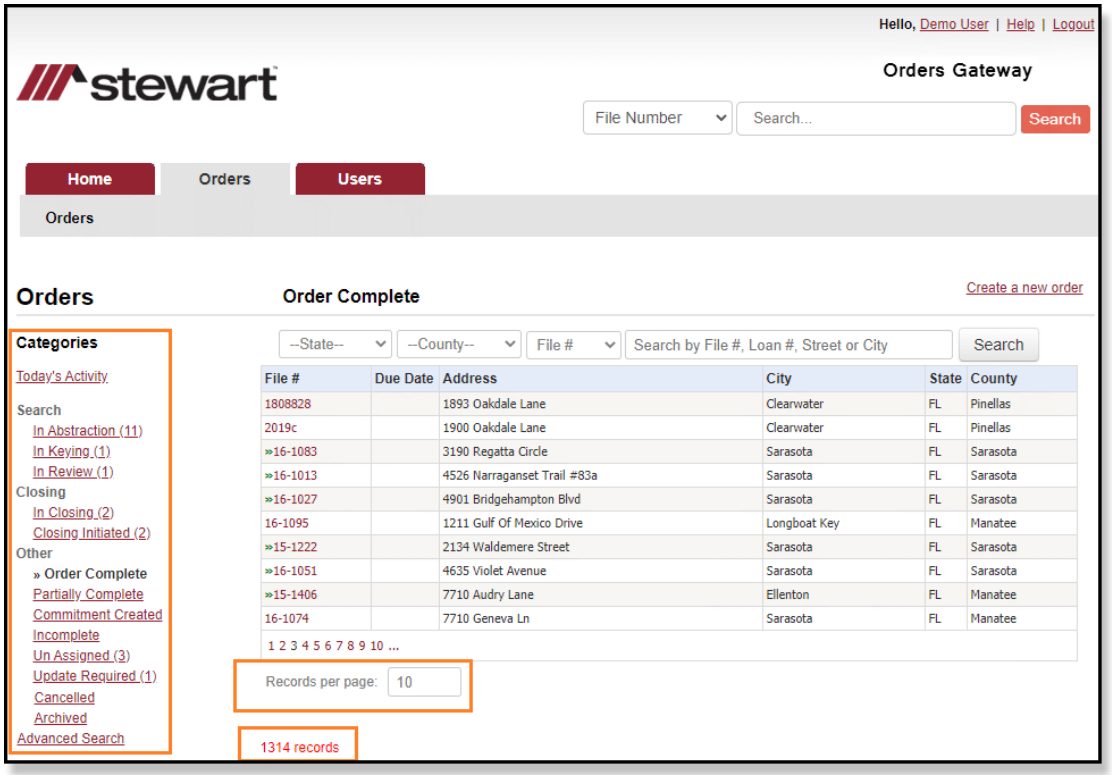


2. To view search standards for a state, click the state link from the box located at the top of the screen.



Using the Orders Tab

Use the options within the *Orders* tab to easily navigate through all orders within a selected category and queue. Selecting a category displays all orders within the related queue. The number of records within the queue is listed at the bottom of the page. In addition, the *Total record count* and *Records per page* display.



Searching for Orders

Using the available search options, you can search for an order by category, or search all categories at once using the **Advanced Search** feature.

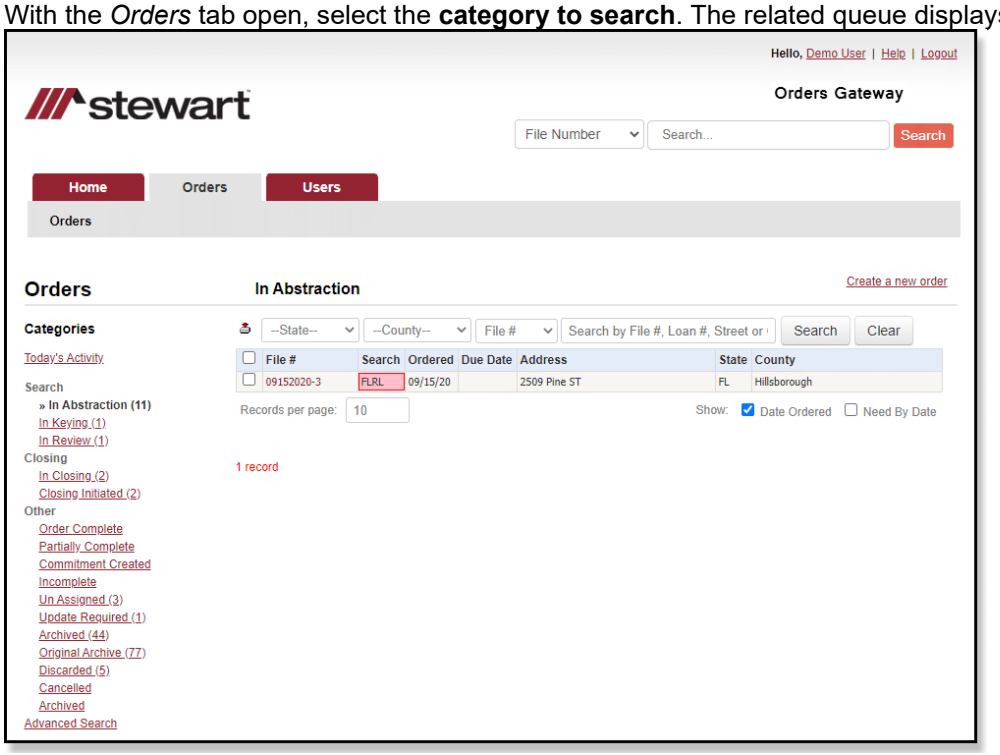
Tip: As a best practice, it is recommended that you use the **Advanced Search** feature to ensure finding the order you are looking for. This feature searches orders in all categories, queues no matter the status. For example, an order with an *In-Review* status may not display in the selected category or queue. The best way to locate an order with this status would be to use **Advanced Search**.

By Category

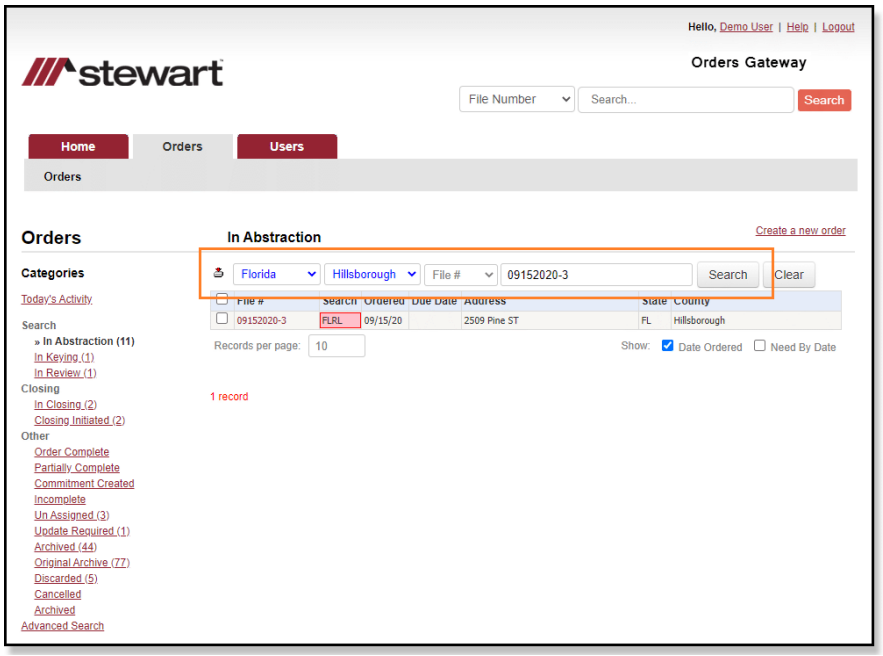
Complete these steps to search for an order by category:

Steps

1. With the *Orders* tab open, select the **category to search**. The related queue displays existing orders.



2. If you know the state, county or file number, use the search feature displayed at the top of the queue to locate the order you want to find.



- Click the drop-down arrow in the **first** field to select the state.
- Click the drop-down in the **County** field to select the county.
- Type the file number in the **File Number** field to search for a specific file number.

3. When finished, click **Go**. Search results matching the criteria entered display in the queue.

Note: Click a column header in the queue to sort data in both ascending and descending order.

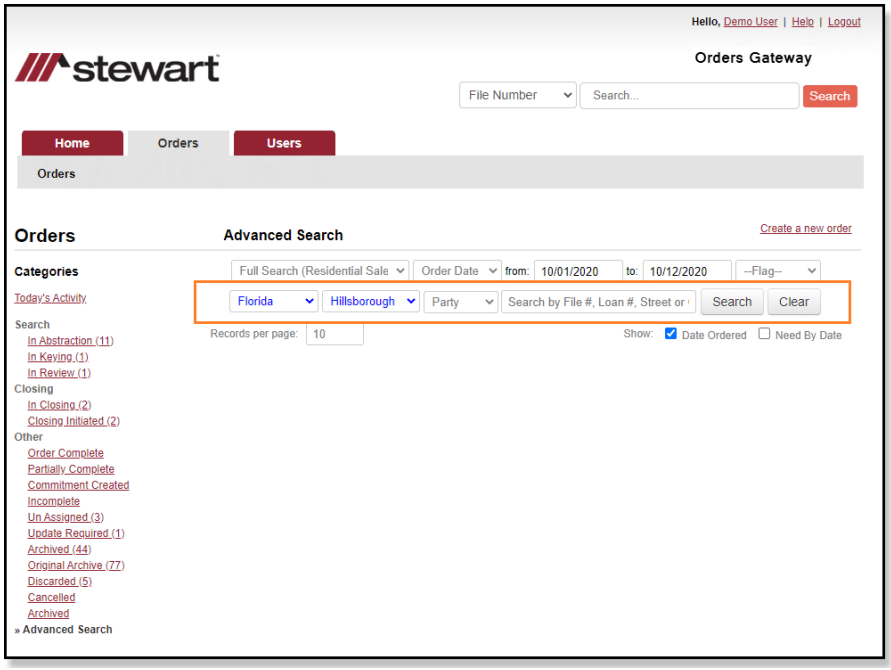
Using Advanced Search

As a best practice, it is recommended that you use the **Advanced Search** feature to ensure finding the order you are looking for. This feature searches orders in all categories and queues no matter the status. For example, an order with an *In-Review* status may not display in the selected category or queue. The best way to locate an order with this status would be to use **Advanced Search**.

Complete these steps to search for an order using **Advanced Search**:

Steps

1. With the *Orders* tab open, click the **Advanced Search** link. Additional search options display.



- **State—**Click the drop-down arrow to display a list of state abbreviations. From the list, select the state you want to search.
- **County**—Click the drop-down arrow to display a list of counties. From the list, select the county you want to search.
- **File or Loan #**—Type the file or loan number you want to search for.
- **Status—**Search for orders by status; click the drop-down arrow to display a list.
- **Order Date—**Search for orders by date range; type the first date to search in the **From** field, and the last date in the **To** field.
- **Party Name—**Search for orders by the name of a party included in the order; type the party name.

2. When finished, click **Search**. Search results matching the criteria entered display in the queue.

Note: Click a column header in the queue to sort data in both ascending and descending order.

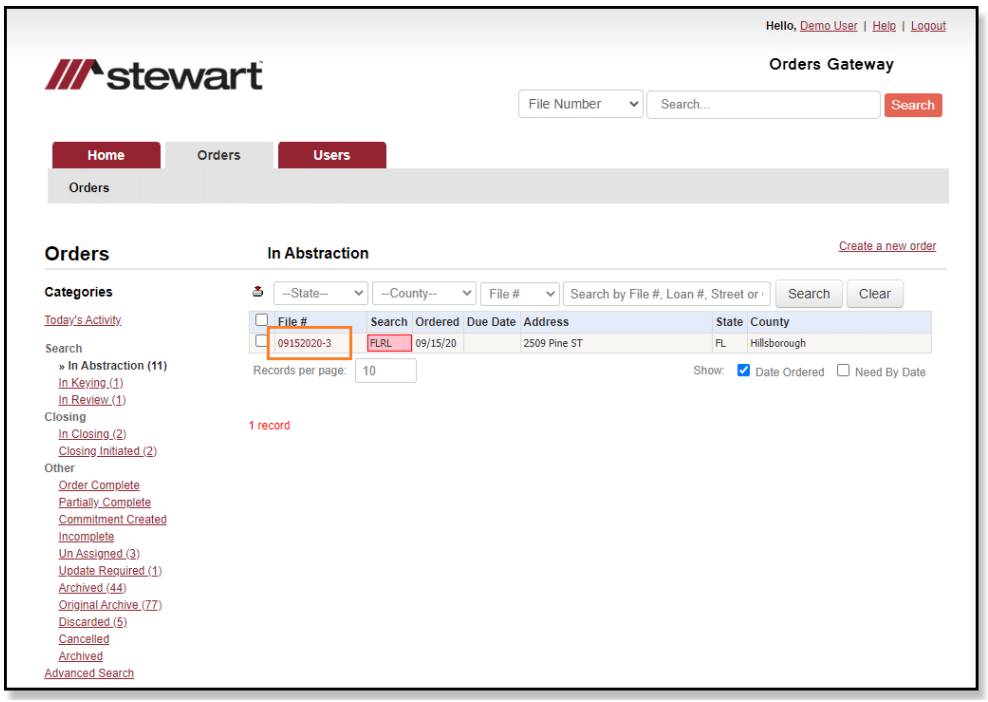
Viewing Order Details

Once you have located the order you want to work with, you can view the order details.

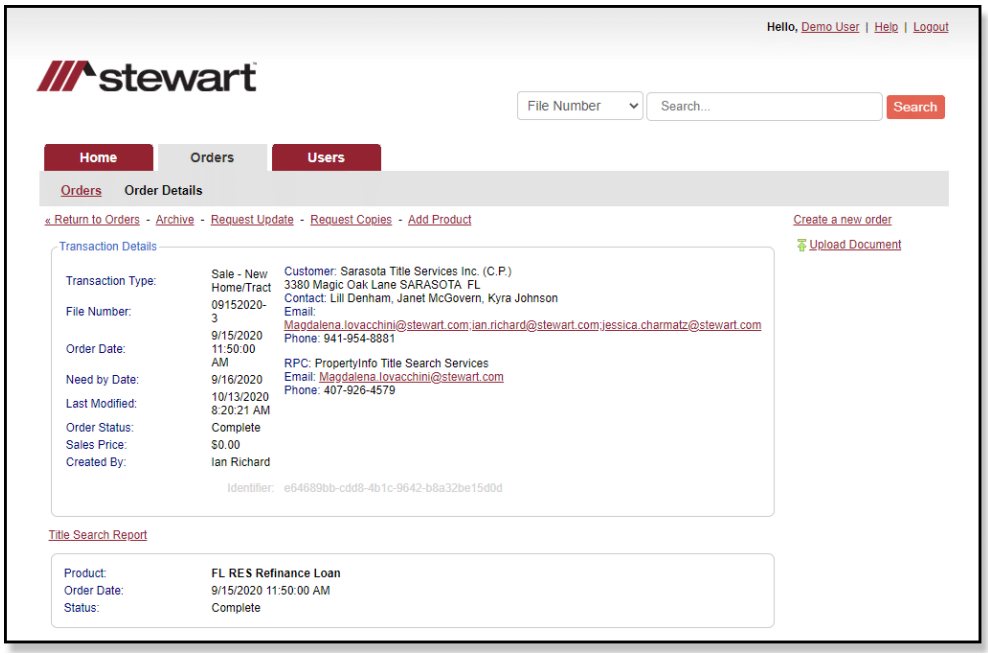
Complete these steps to view the order details:

Steps

1. From the queue, click the **file number**. The *Order Details* screen displays.



2. Use the options within the screen to view the order details.



3. When finished, click **Return to Orders**.

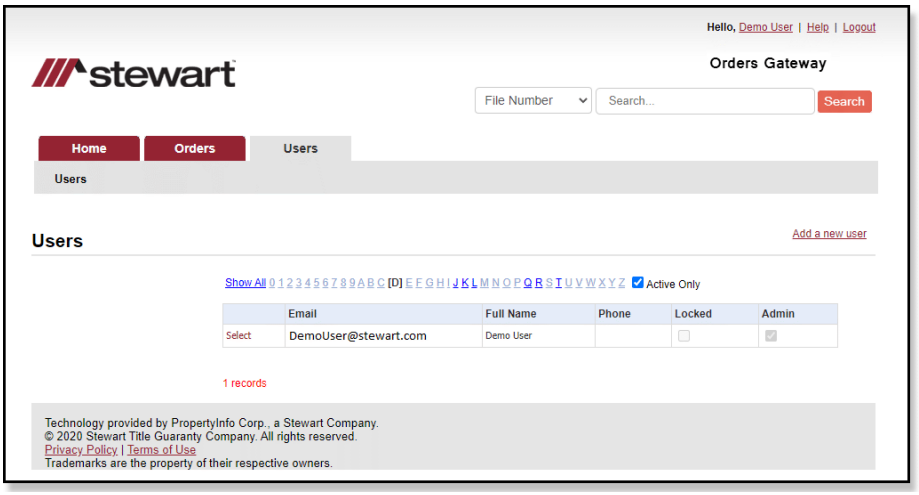
Using the Users Tab

Use this tab to list all users by company. You can search for a user and view or edit their information.

Complete these steps to view or edit user information:

Steps

1. From the tab list, click **Users**. The Users screen displays.



2. You can:
   - Search for a user by name or number. Select **a letter or number** from the top menu.
   - Edit user information by clicking **Select** to the left of the username.

Creating an Order

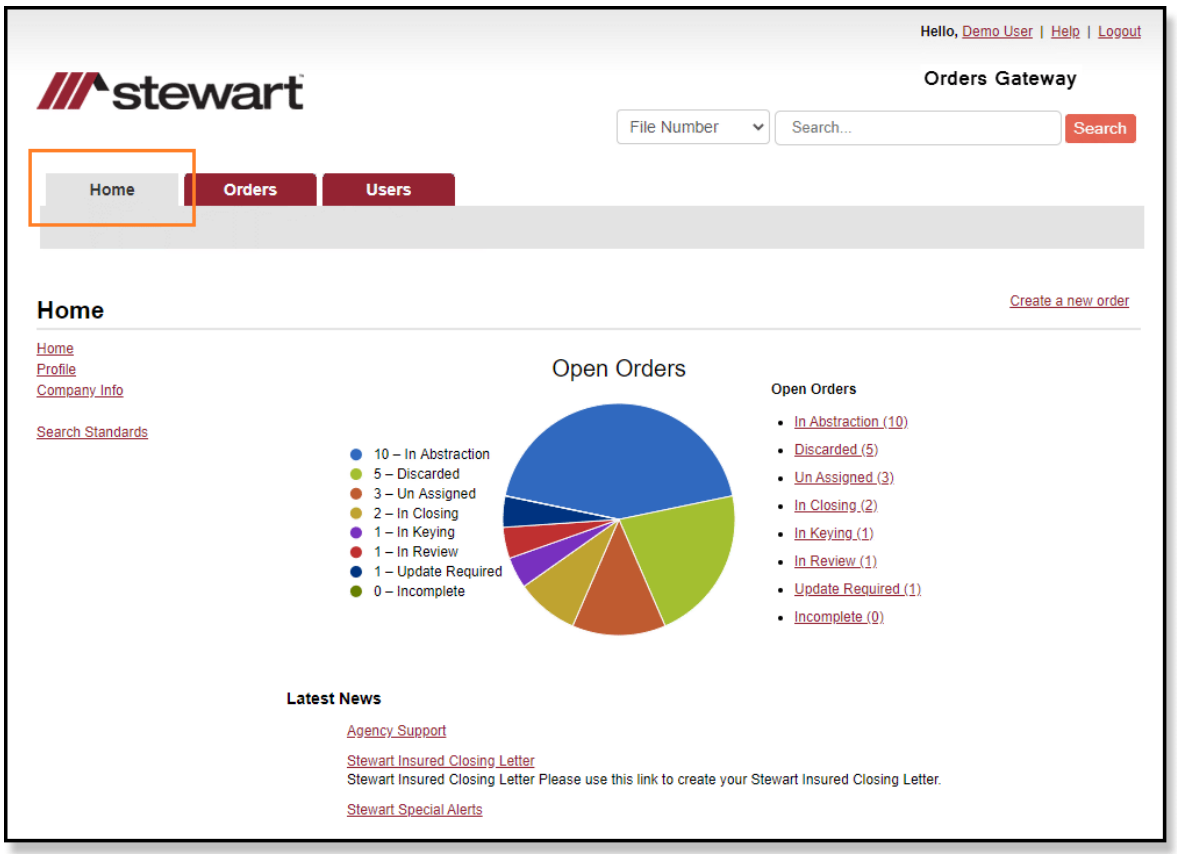
When you are ready to order a title search, a new order must be created. Once the order is created, you can submit it to your designated **Regional Production Center** (**RPC**). The **RPC** performs the initial title search and returns it to you in the form of an email link.

Note: Most information requested on the New Order screens is *optional* and not required to complete an order. However, it is best to enter as much information as possible to return a successful search. To help you distinguish which fields require entry and which do not, required fields are marked with a **red asterisk** (*) in this document. Look for these fields as you complete the steps to create a new order.

Complete these steps to create a new order:

Steps

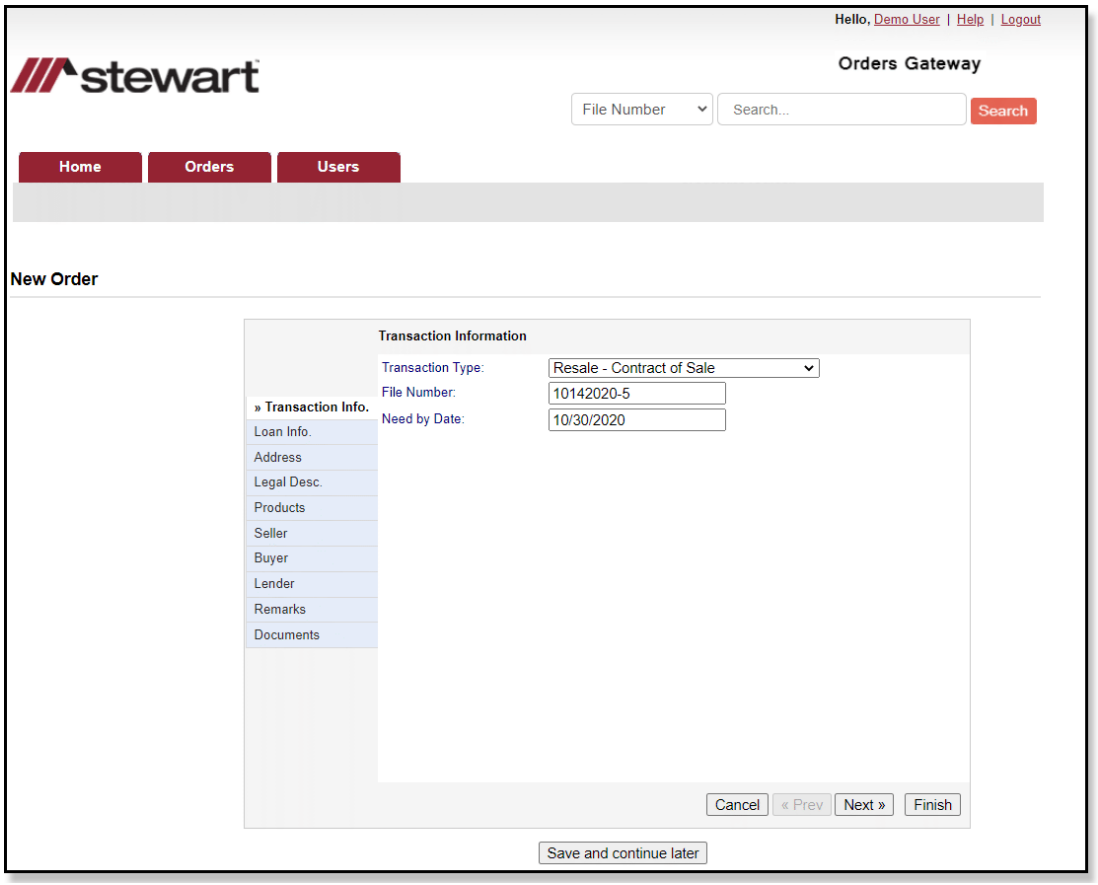
1. Log into **Orders Gateway**. The *Home* tab displays.



2. With the *Home* tab open, click **Create a new order**. The *New Order page* displays.

3. Create a new order by completing the requested information. Notice new order information is divided into various sections. By default, the *Transaction Information* is requested first. Complete this section.

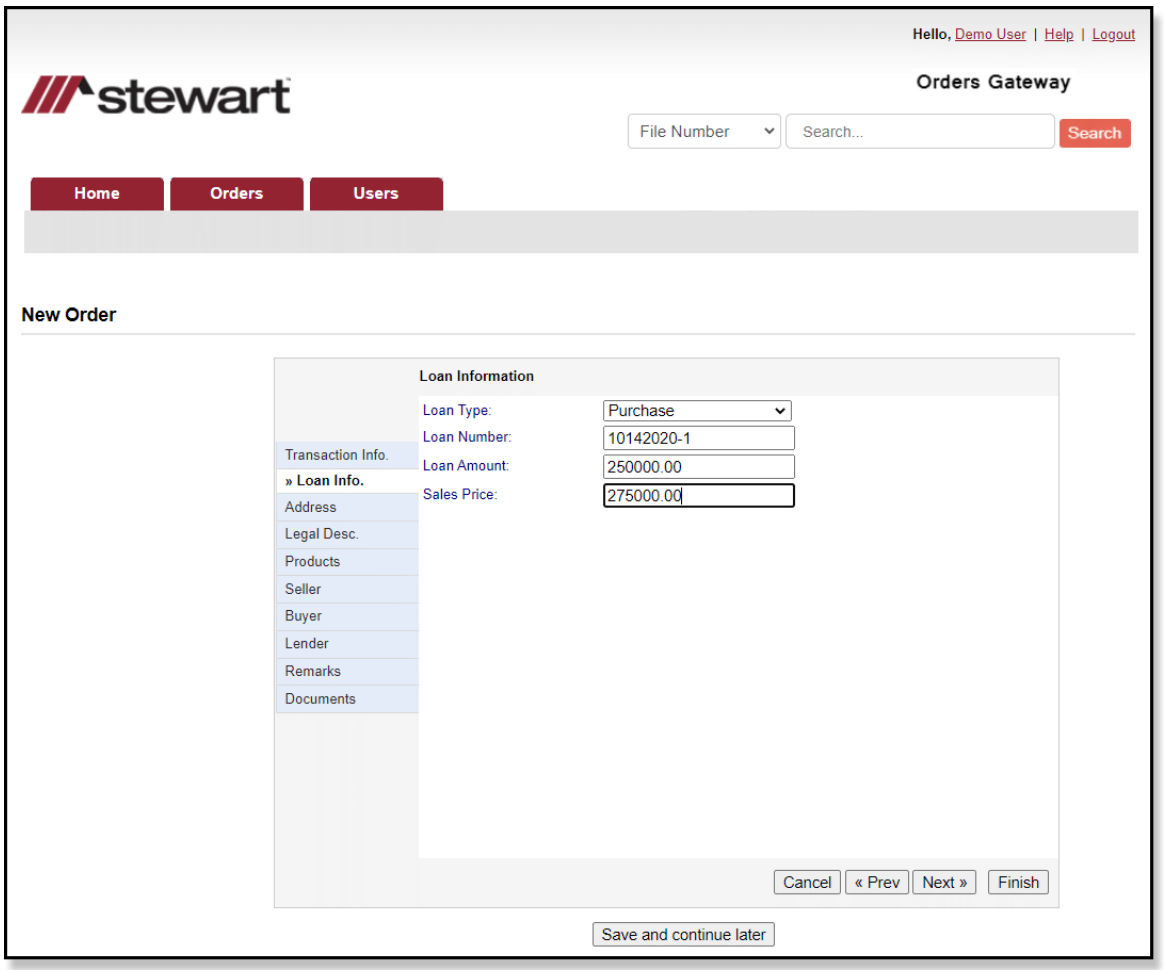
Transaction Information



- **Transaction Type**—Defaults to **Resale-Contract of Sale**. If needed, click the drop-down arrow to display a list of other options.
- **File Number** *—Type the file number.
- **Need by Date**—Enter the date the search is needed by. You can type the date or click the **Calendar** icon to display an electronic calendar. Use the calendar to select a date.

4. To continue, click **Loan Info** from the left navigation menu, or **Next** to enter the loan information.

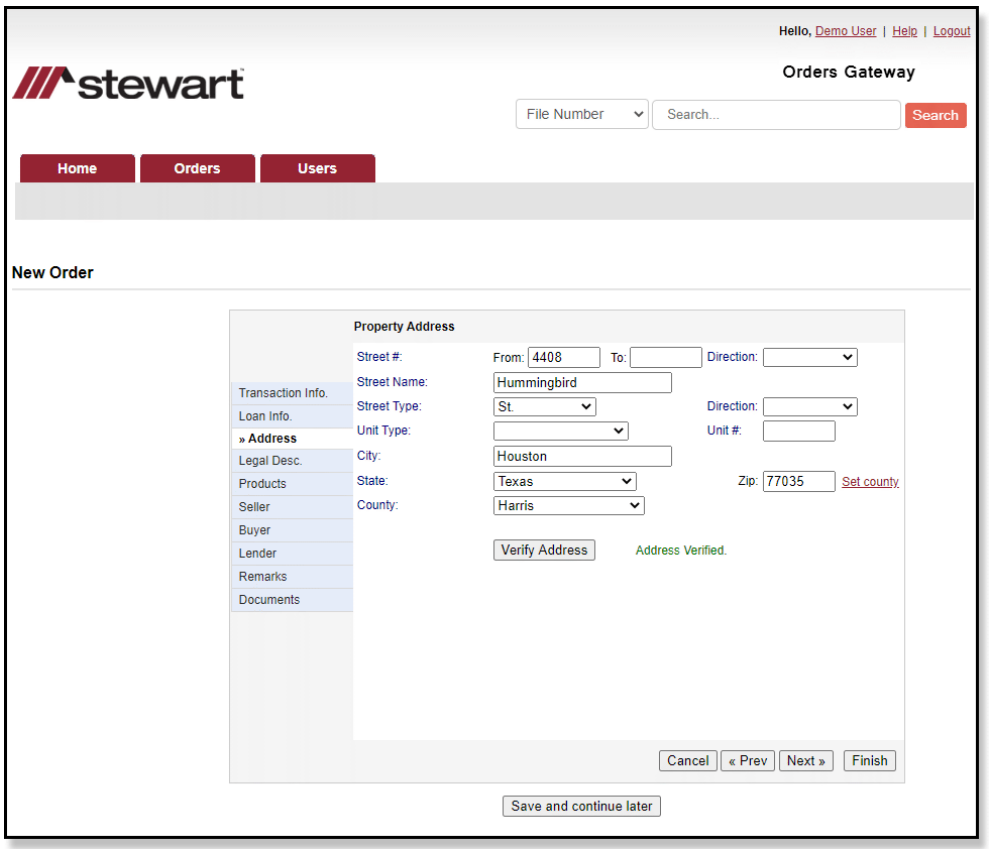
Loan Information



- **Loan Type**—Click the drop-down arrow to select the loan type.
- **Loan Number**—Type the loan number.
- **Loan Amount**—Type the loan amount in dollars and cents.
- **Sales Price**—Type the sales price in dollars and cents.

5. To continue, click **Address** from the left navigation menu or **Next** to enter the address.

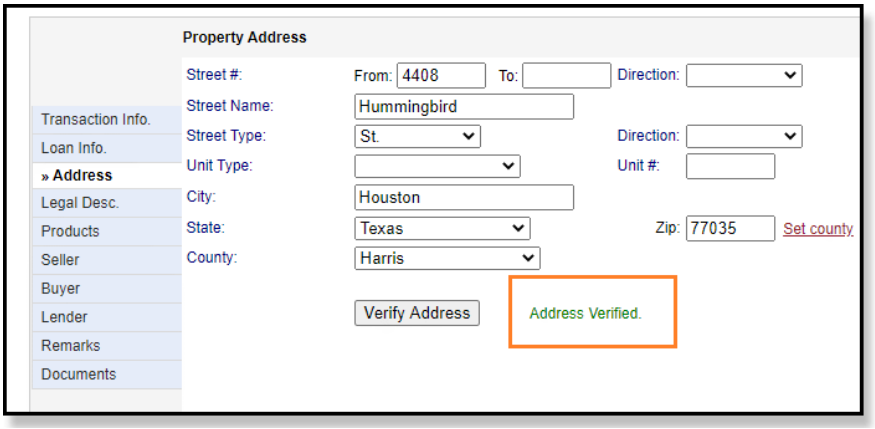
Property Address



- **Street #/From/To**—Define the number range to search for street number. Type the beginning number in the **From** field, and the ending number in the **To** field.
- **Direction**—If applicable, select the street direction. Click the drop-down arrow to display a list.
- **Street Name**—Type the street name.
- **Street Type**—Select the street type. Click the drop-down arrow to display a list.
- **Direction**—If applicable, select the street direction. Click the drop-down arrow to display a list.
- **Unit Type**—If applicable, select the unit type. Click the drop-down arrow to display a list.
- **Unit #—**If applicable, type the identifying unit number.
- **City**—Type the name of the city where the property is located or type the zip code to automatically populate this field.
- **State** *—This field is required to view a list of available products (on the **Products** page). Type the name of the state where the property is located or type the zip code to automatically populate this field.
- **Zip/Set county**—Type the zip code where the property is located, then click **Set County** to automatically populate the County based on the zip code or you can select the county name from the County field. Typing the zip code automatically populates the **City** and **State** fields.
- **County** *—This field is required to view a list of available products (on the **Products** page). Select the county where the property is located. Click the drop-down arrow to display a list.
- **Verify Address**—Click to verify the address.

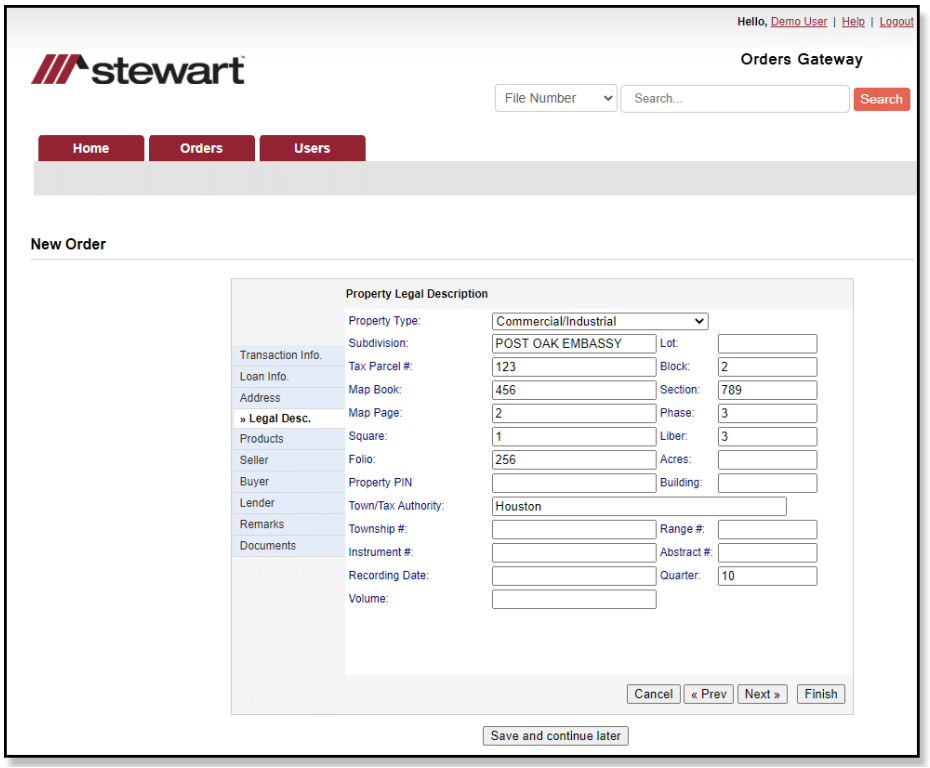
Note

It is important to always verify the property address. Make sure to click **Verify Address** before continuing to Step 6. Once the address is verified, the **Address Verified** text displays in green.



6. To continue, click **Legal Description** or **Next** to enter the property's legal description.

Legal Description



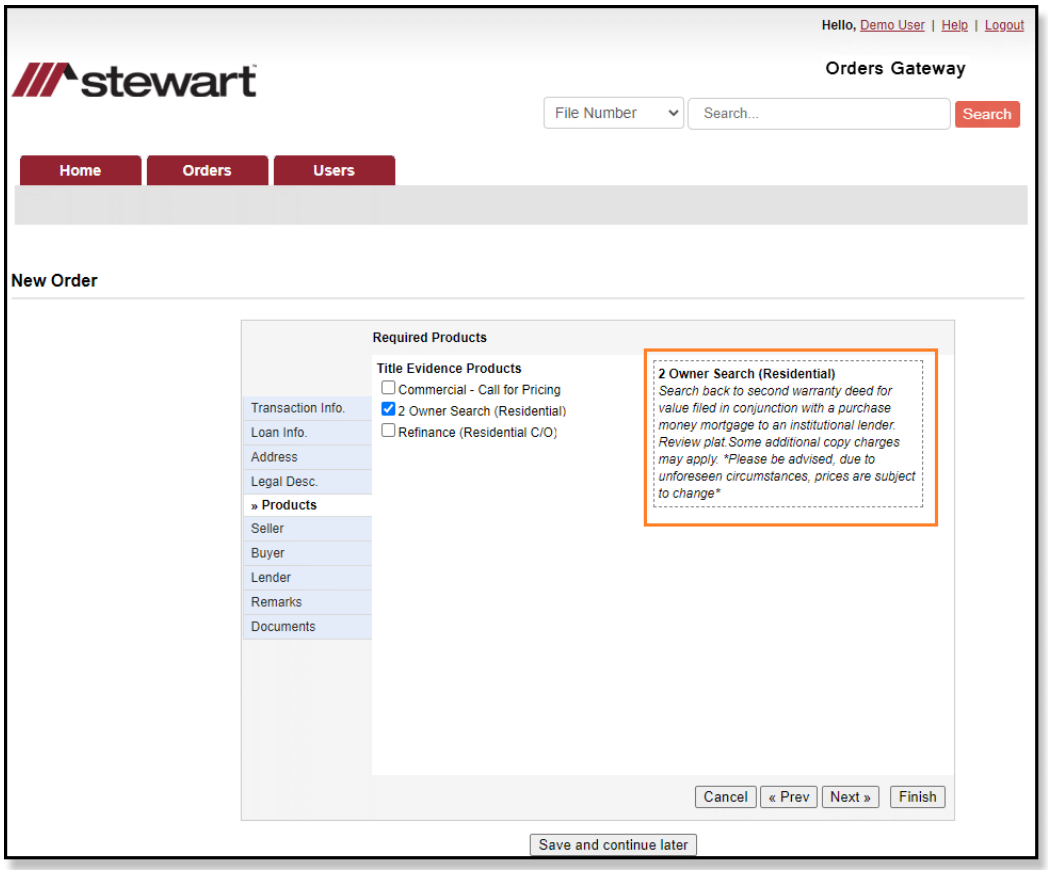
Note

Notice the **Subdivision** name defaults based on the address information entered.

- **Property Type**—Select the property type. Click the drop-down arrow to display a list.
- **Subdivision/Lot**—Notice the subdivision name automatically displays based on the address information entered in the previous **Address** section. If applicable, type the identifying lot number.
- **Tax Parcel #/Block**—Type the parcel and block numbers where this property is located.
- **Map Book/Section**—Type the map book and section numbers where this property is located.
- **Map Page/Phase**—Type the map page and phase numbers where this property is located.
- **Square/Liber**—Type the square and liber numbers where this property is located.
- **Folio/Acres**—Type the identifying folio name or number, as well as, the number of acreage this property may occupy.
- **Town/Tax Authority**—Type the name of the town or tax authority who governs taxes in the area where the property is located.

7. To continue, click **Products** from the left navigation menu or **Next** if you want to purchase additional products along with the order. Since products are listed by state, the property's state and county must be selected on the **Address** page to view a list of available products.

Products

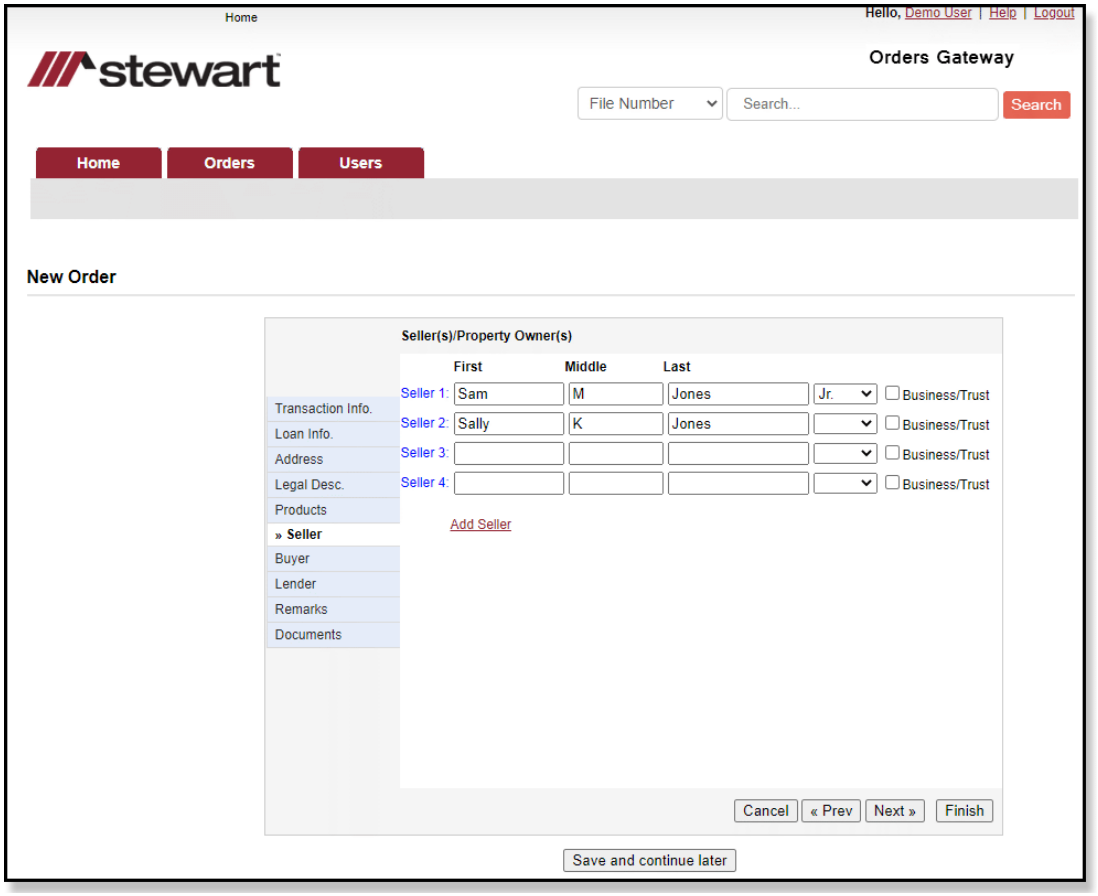


Note

Hover your mouse over any product to view a detailed product description. Notice the description displays in the space to the right of the product list.

8. To continue, click **Seller** from the left navigation menu or **Next** if you want to enter the seller's information.

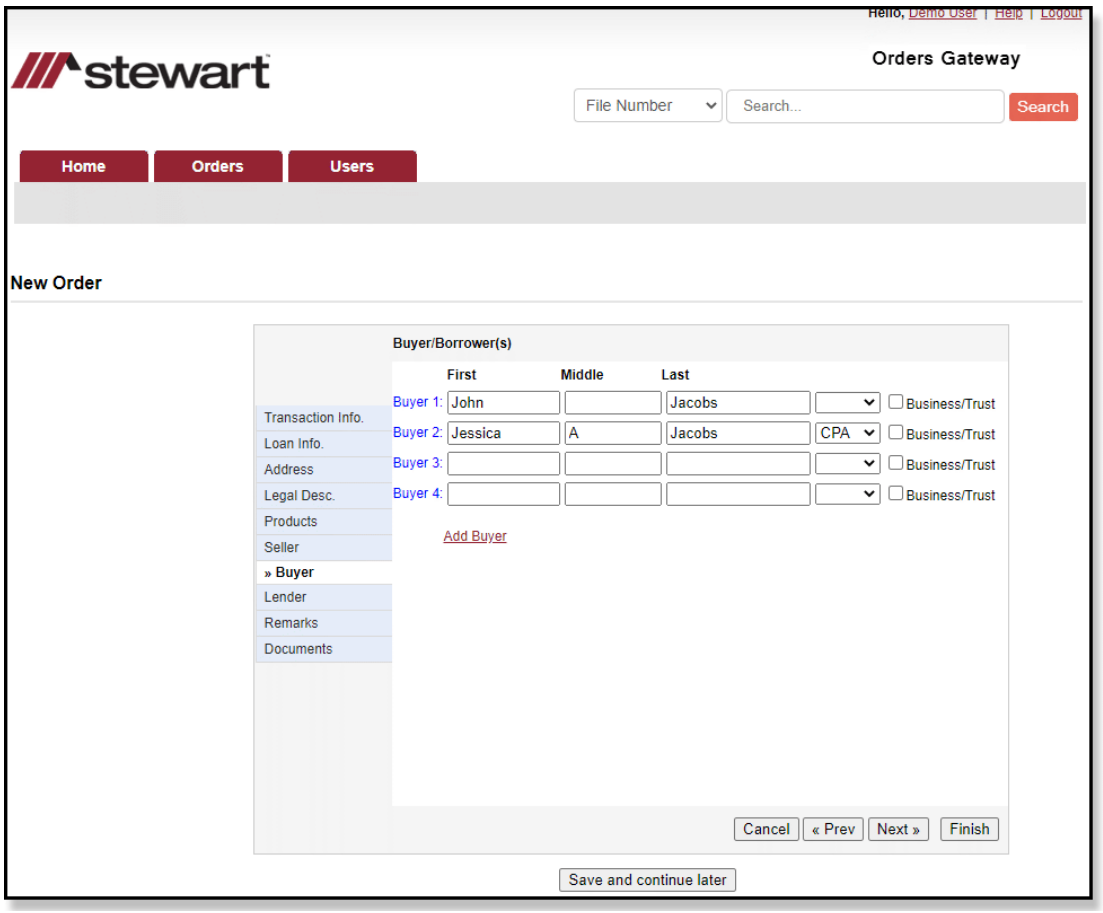
Seller



- **Seller 1** through **Seller 4**—Type the seller's full name; including their first name, middle initial and last name. Select any applicable suffix; for example, Jr., Sr., CPA or Ph.D.
- **Is Business**— If the seller is a business, then select the **Is Business** check box. Selecting this option removes the first, middle and last name fields and replaces them with a single field used to type the business name.
- **Add Seller**—If more than four sellers exist, click **Add Seller** to display additional fields. Use these fields to type any additional seller names.

9. To continue, click **Buyer** from the left navigation menu or **Next** if you want to enter the buyer's information.

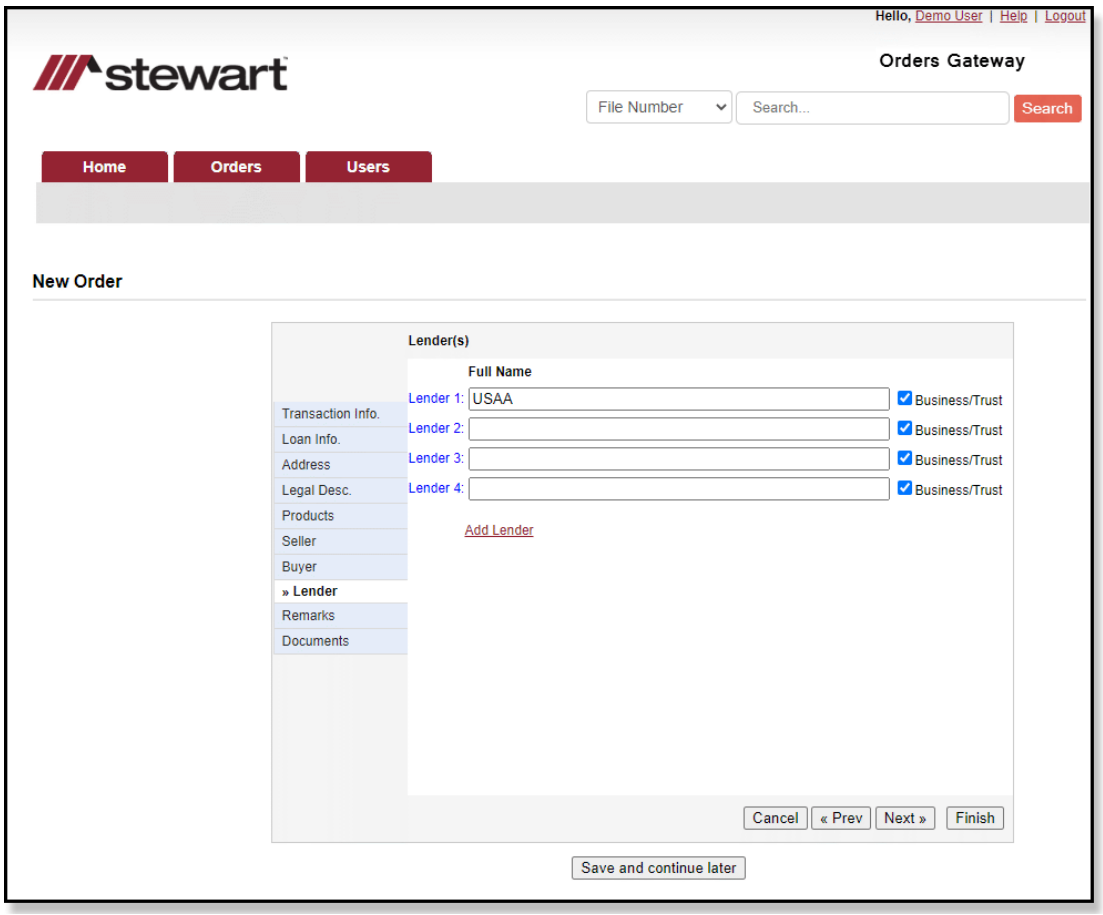
Buyer



- **Buyer 1** through **Buyer 4**—Type the buyer's full name; including their first name, middle initial and last name. Select any applicable suffix; for example, Jr., Sr., CPA or Ph.D.
- **Is Business**— If the buyer is a business, then select the **Is Business** check box. Selecting this option removes the first, middle and last name fields and replaces them with a single field used to type the business name.
- **Add Buyer**—If more than four buyers exist, click **Add Buyer** to display additional fields. Use these fields to type any additional buyer names.

10. To continue, click **Lender** from the left navigation menu or **Next** if you want to enter the lender's information.

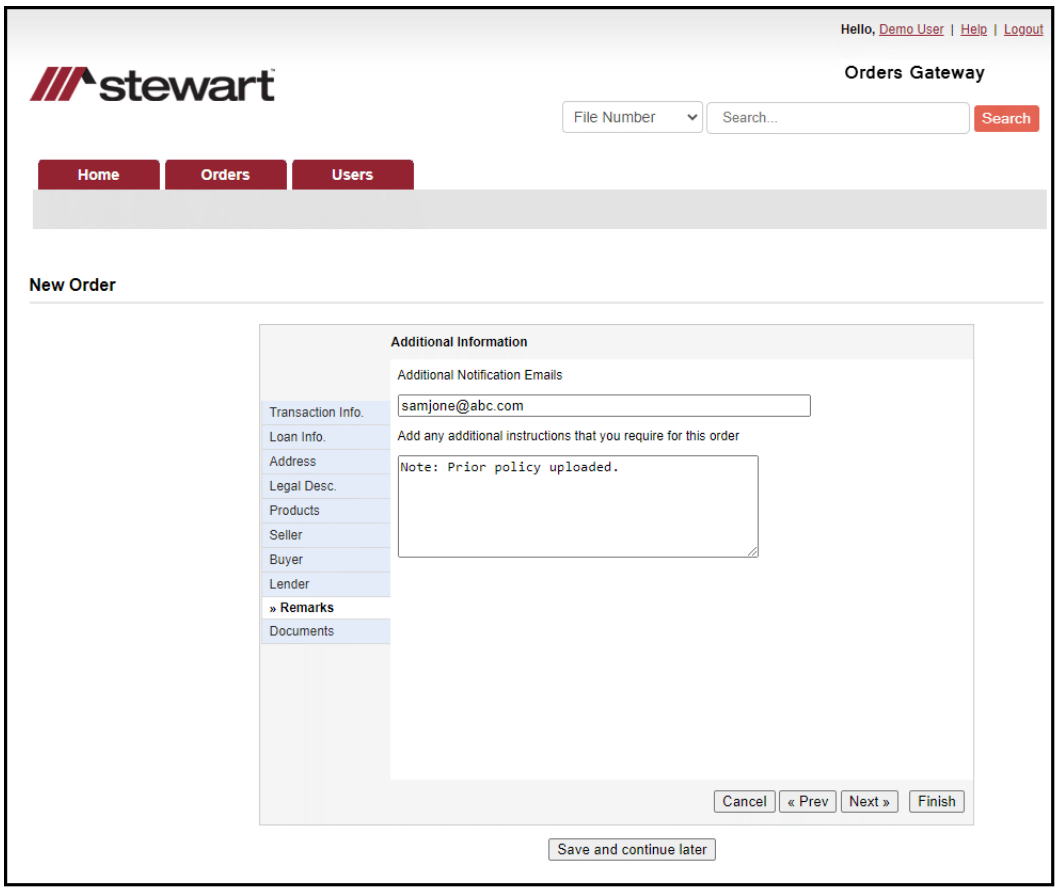
Lender



- **Lender 1** through **Lender 4** —Type the lender's full name. If the lender is an individual, clear the **Is Business** check box and type the lender's full name including their first name, middle initial, and last name. Select any applicable suffix; for example, Jr., Sr., CPA or Ph.D.
- **Is Business**—By default, this option is selected. If the lender is not a business, select this check box to clear the option. Selecting this option adds fields to enter an individual's first, middle and last names.
- **Add Lender**—If more than four lenders exist, click **Add Lender** to display additional fields. Use these fields to type any additional lender names.

11. To continue, click **Remarks** from the left navigation menu or **Next** if you want to enter any additional remarks or comments about the search.

Remarks



- **Additional Notification Emails**—If someone outside of the designated notification recipient should receive notice this order is completed, type the person's email address.
- **Add any additional instructions that you require for this order**—Type any additional notes, or comments regarding this order. For example, "Wife deceased" or "Uploaded Prior Policy." Do not add instructions such as "Rush or Urgent."

12. When complete, click **Finish**. The order is created and sent to your designated Regional Production Center (RPC). The RPC completes their work and sends you an email notification with a link to the file in Orders Gateway.

Completing the Order

When the **Regional Production Center** (**RPC**) completes the title search, an email notification is sent to you with a link to access the order in **Orders Gateway**.

From **Orders Gateway** you can:

- Review the Raw Title Search
- Prepare Ancillary documents
- Review the Title Search Report
- Prepare the Commitment

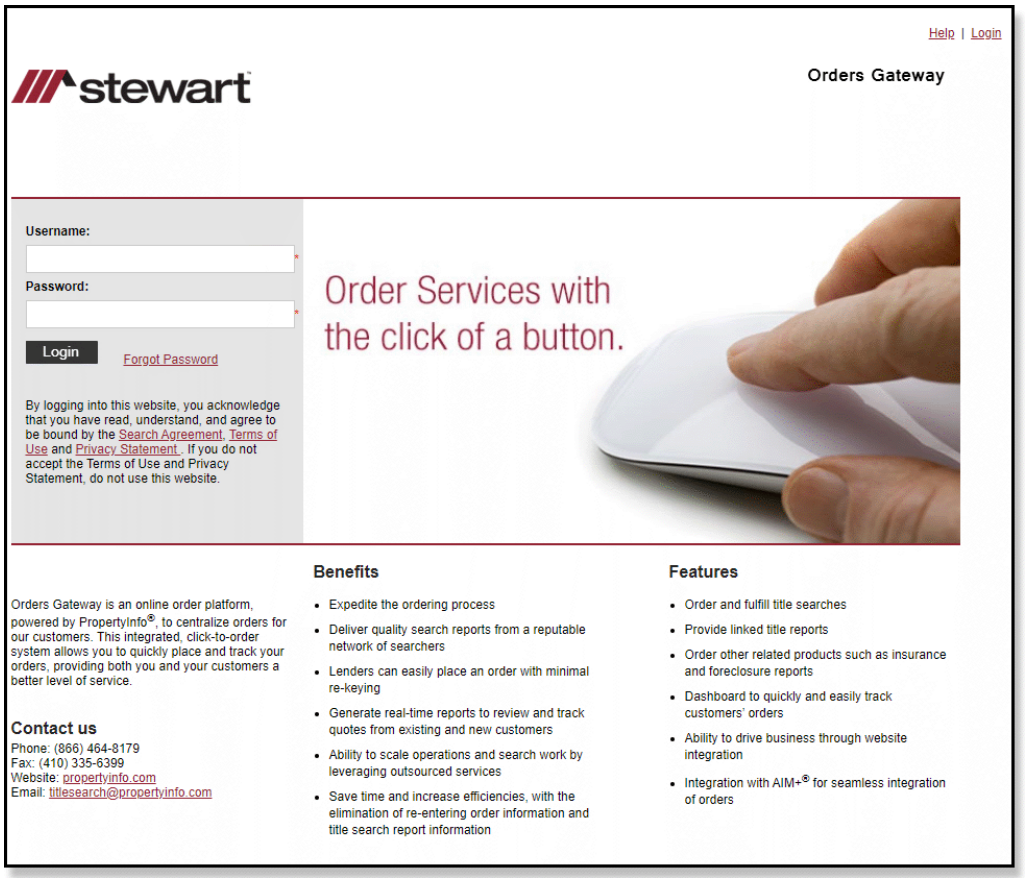
Reviewing the Raw Title Search

To begin, review the Raw Title Search to confirm the evidence found correlates with the information entered.

Complete these steps to review the **Raw Title Search**:

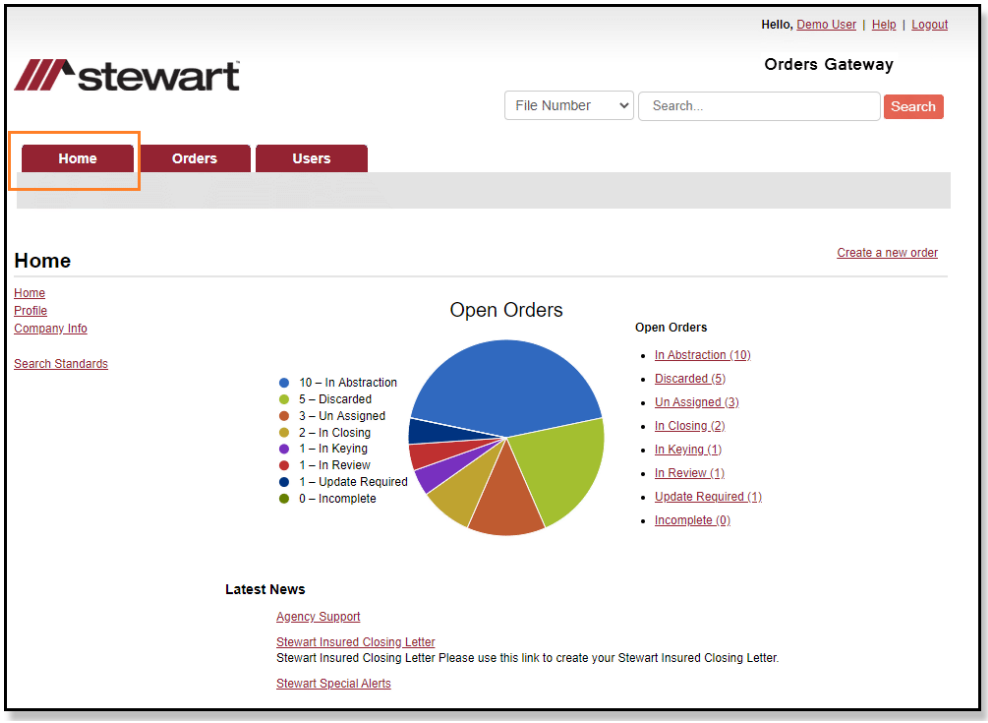
Steps

1. Open the email notification received from the **Regional Production Center** (**RPC**) and click the **link** provided to launch **Orders Gateway**. The Log In page displays.

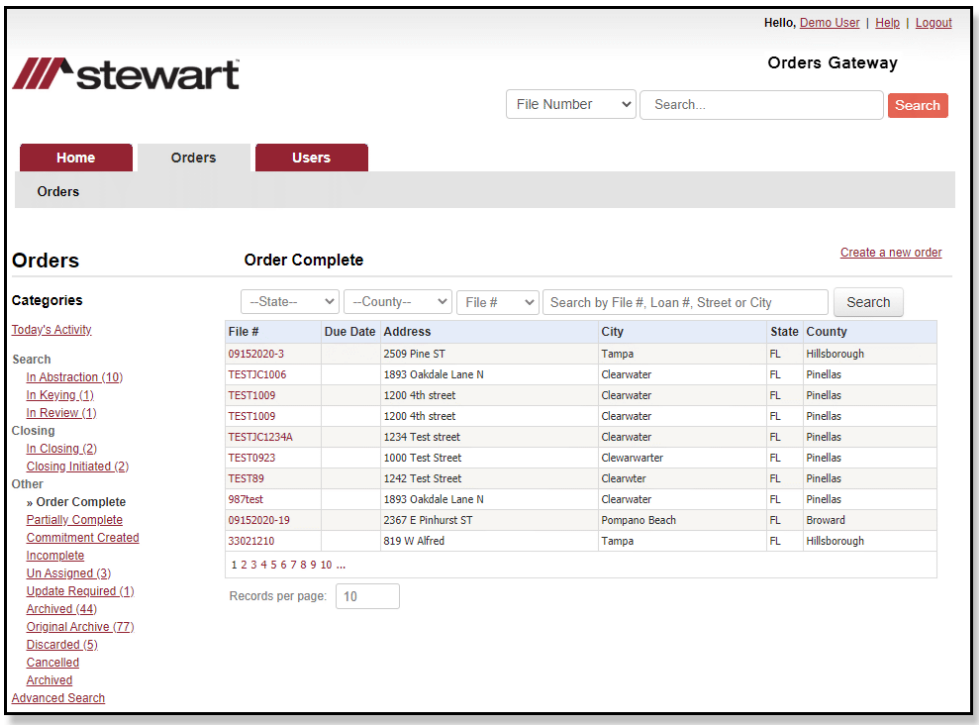


2. Complete these fields:
   - **Username**—Type your username.
   - **Password**—Type your password.

3. When finished, click **Login**. The *Home* tab displays.

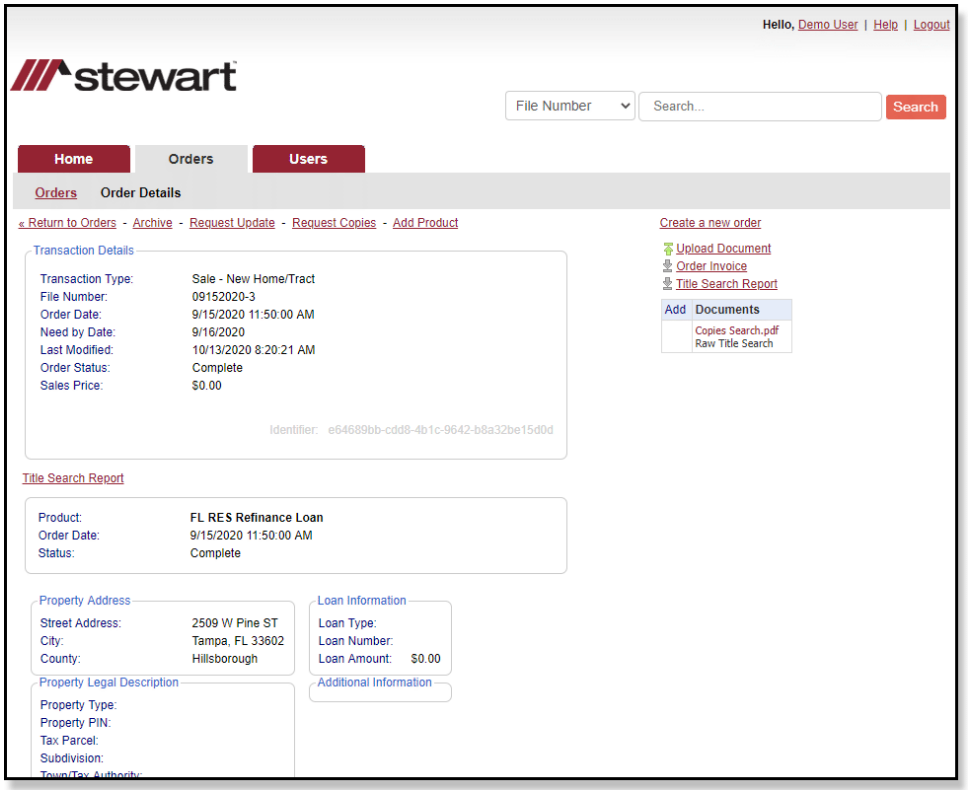


4. From the tab list, select **Orders**. The *Orders* tab displays.



5. Click the **Advanced Search** link. Additional search options display.
6. Complete the requested search criteria, and then click **Search**. Search results display.

7. From the results, select the order you want to work with by clicking the **File #.** The *Order Details* screen displays.



8. Click **Raw Title Search** to review the documents and confirm the evidence found correlates with the information entered. Documents display in a separate browser window.
9. When finished, close the browser window to return to the *Order Details* screen. You have reviewed the **Raw Title Search** and are ready to produce ancillary documents.

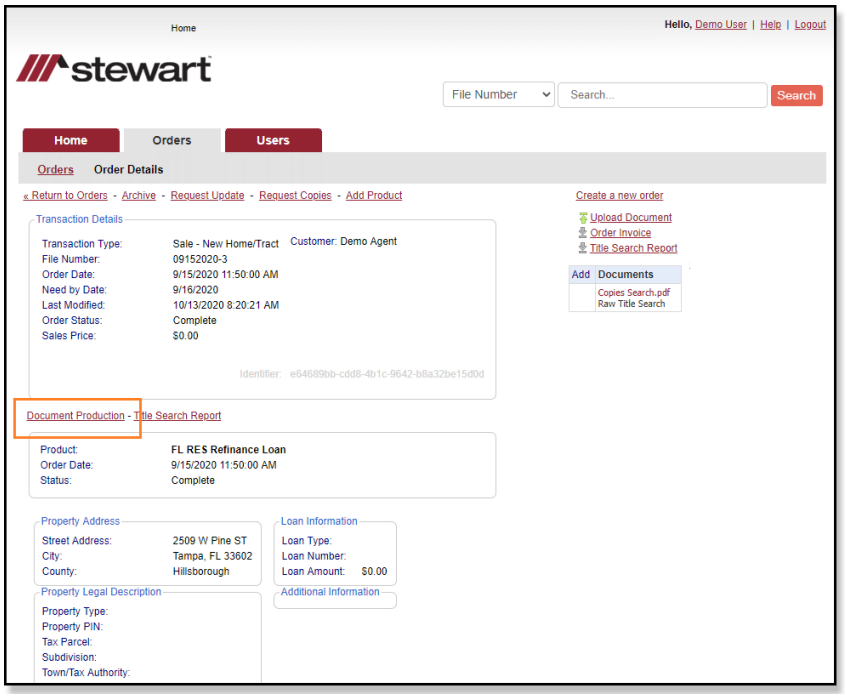
Producing Ancillary Documents

For ease of use, ancillary documents required for the order can be produced from **Orders Gateway**. To produce ancillary documents, you must be assigned the applicable security permissions.

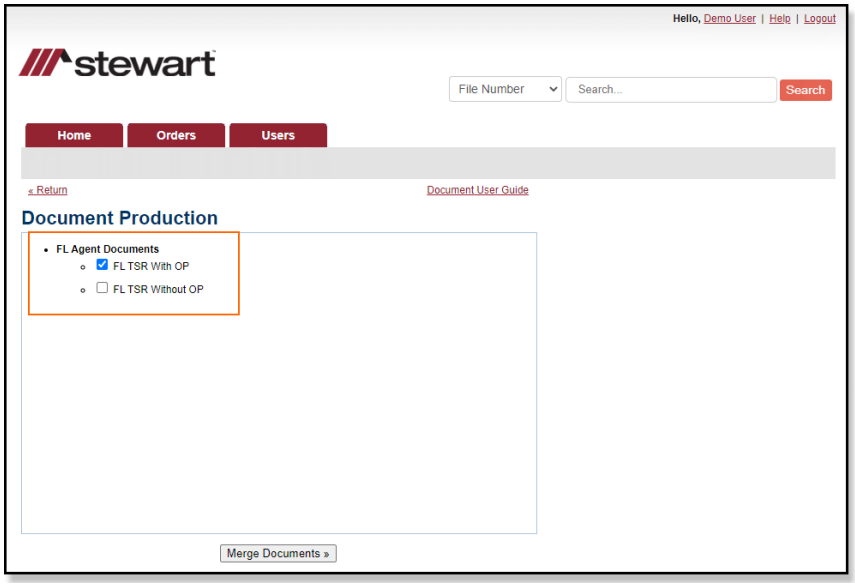
Complete these steps to produce **Ancillary Documents**.

Steps

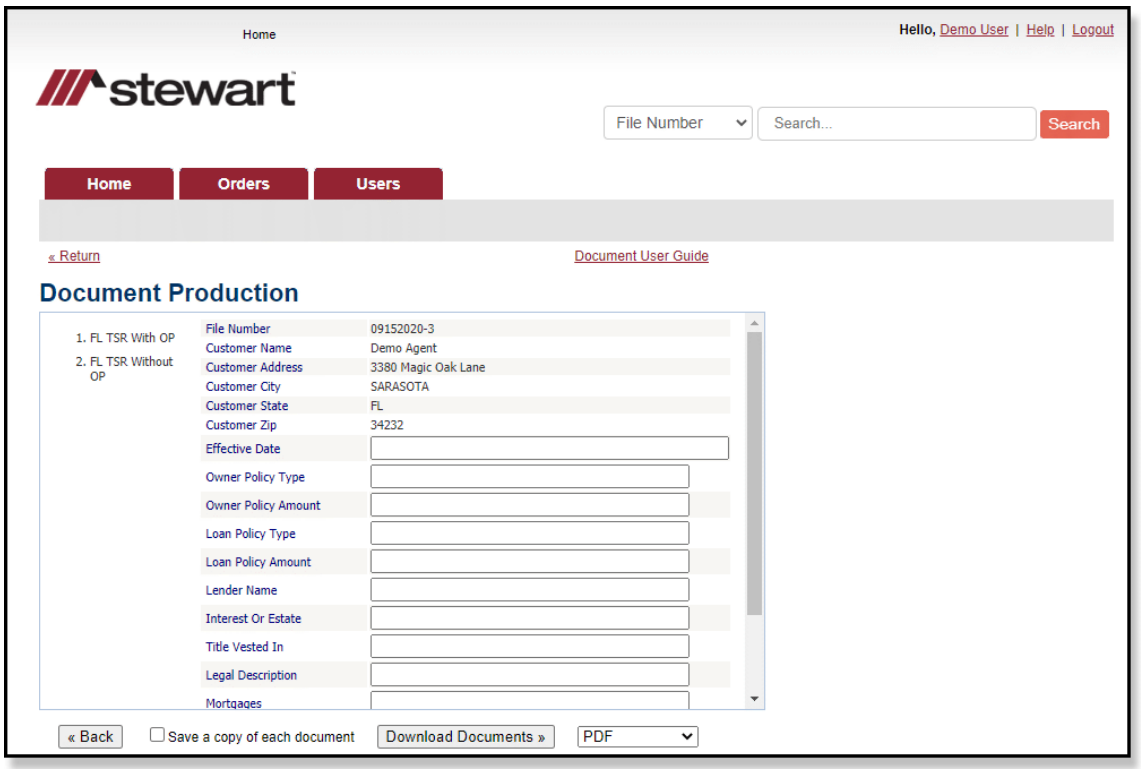
1. From the *Order Details* screen, click **Document Production**.



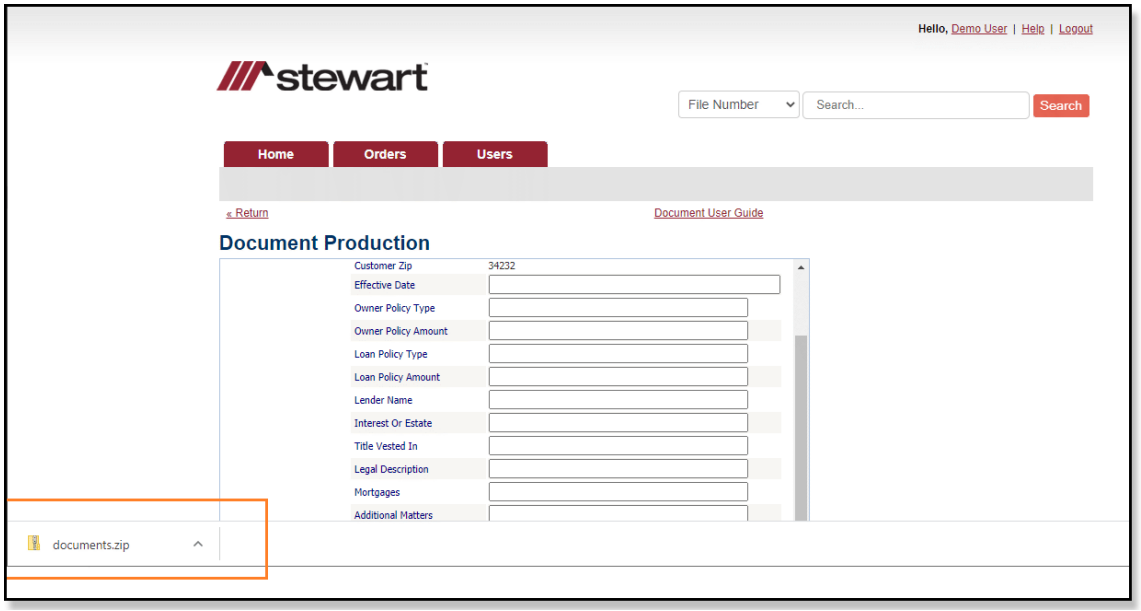
2. From the **Document Production** screen, scroll through the list of available documents and select the ones you want to include.



3. If multiple documents are selected, click **Merge Documents** to merge the documents into a single .PDF file. The merged documents display on a single screen. Notice the document names display on the left and fields allowing entry display on the right.

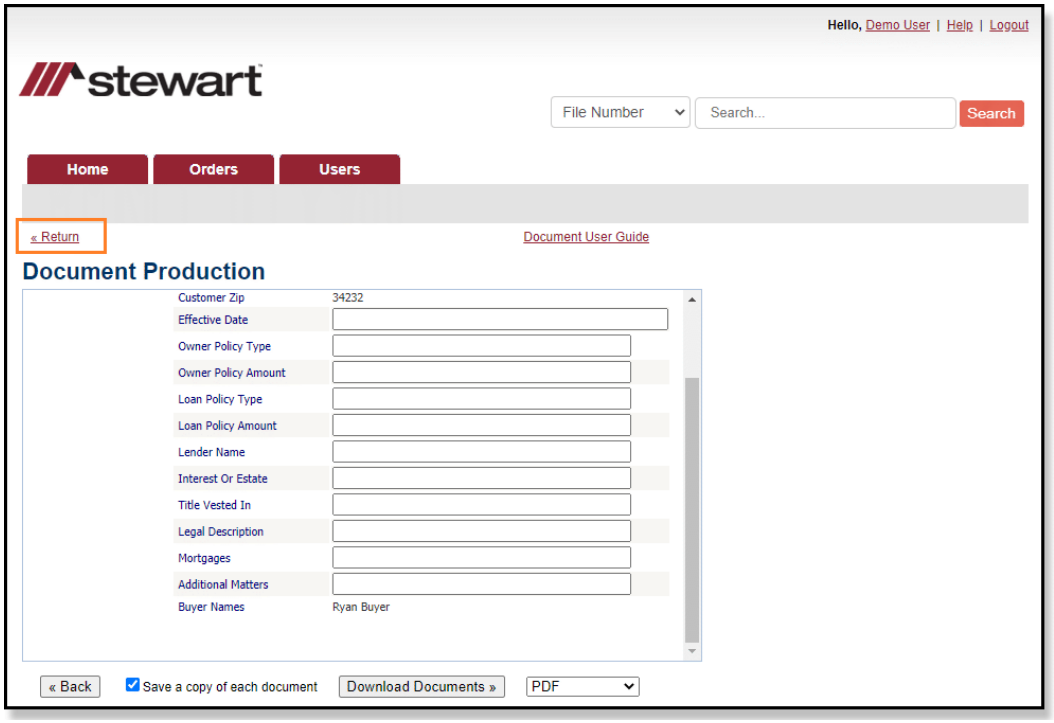


4. If needed, you can type entries in any of the blank fields with appropriate data.
5. When finished, click **Download Documents**. A *File Download* window displays.



6. Complete the action that best describes what you want to do:
   - Click **Open** to open the documents.
   - Click **Save** to save the .PDF file to a location on your computer.

7. When finished, click **Return** to return to the *Order Details* screen.



You have produced the required documents and are ready to prepare the commitment.

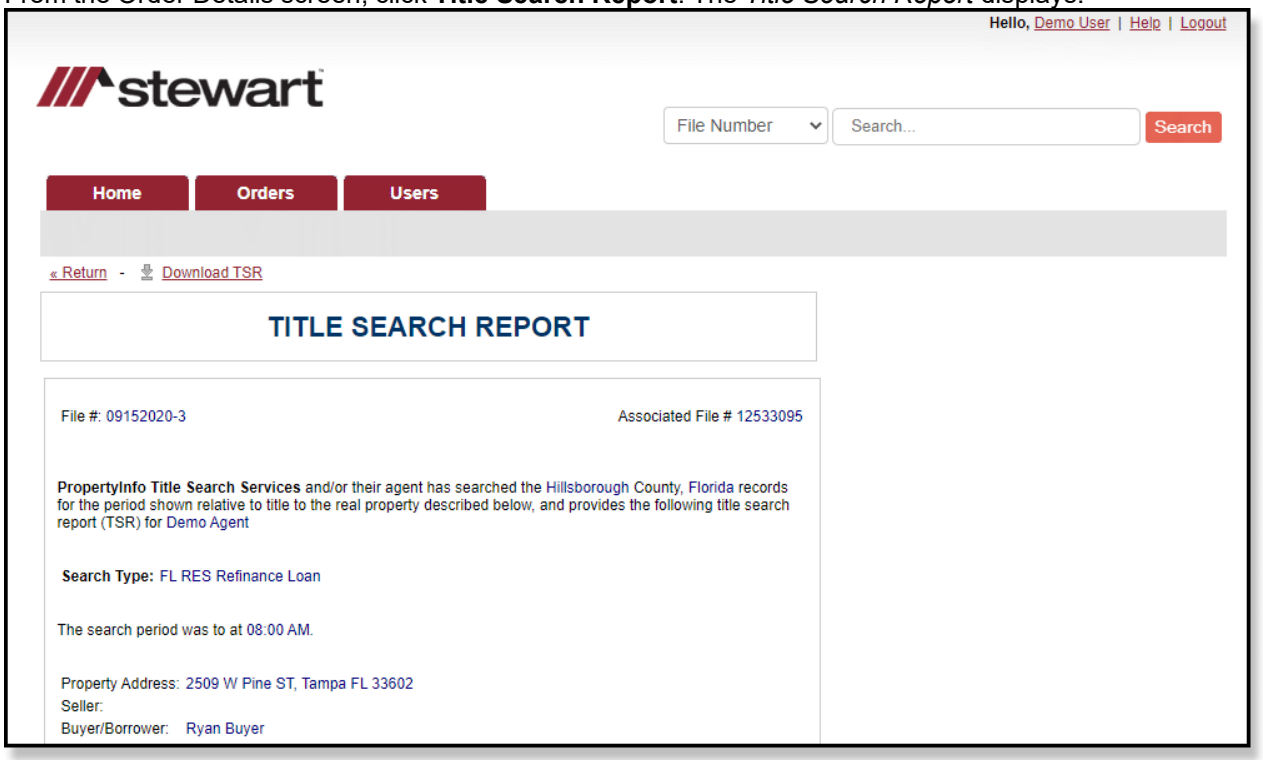
Preparing the Commitment

With the **Raw Title Search** confirmed, and ancillary documents produced, you are ready to prepare the commitment. To prepare a commitment, you must be assigned the applicable security permissions.

Complete these steps to prepare a commitment:

Steps

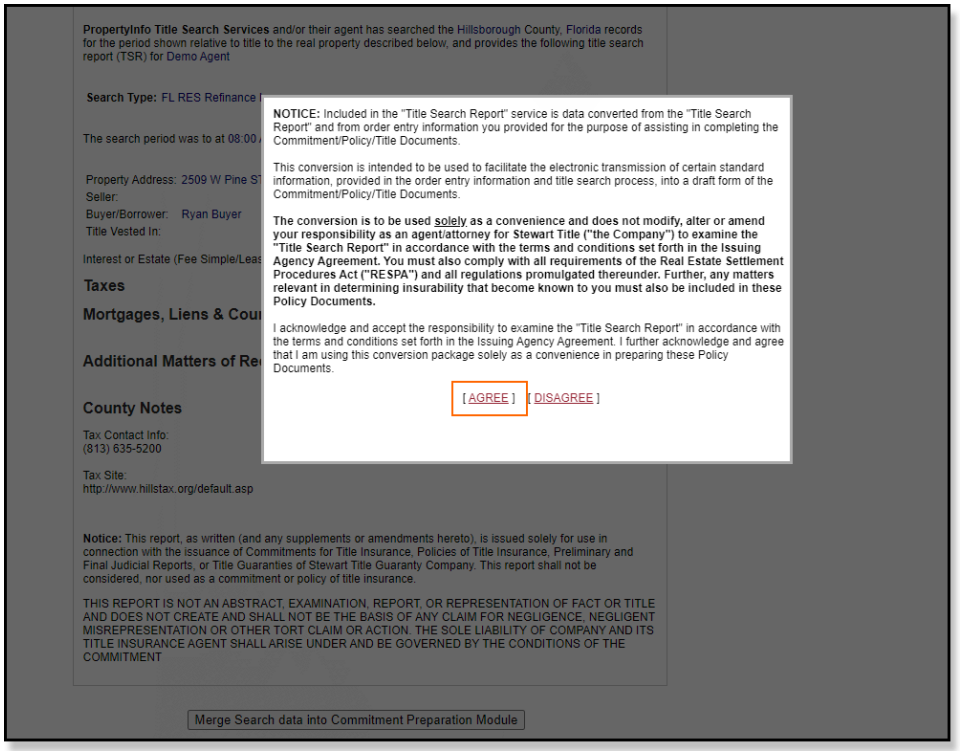
1. From the Order Details screen, click **Title Search Report**. The *Title Search Report* displays.



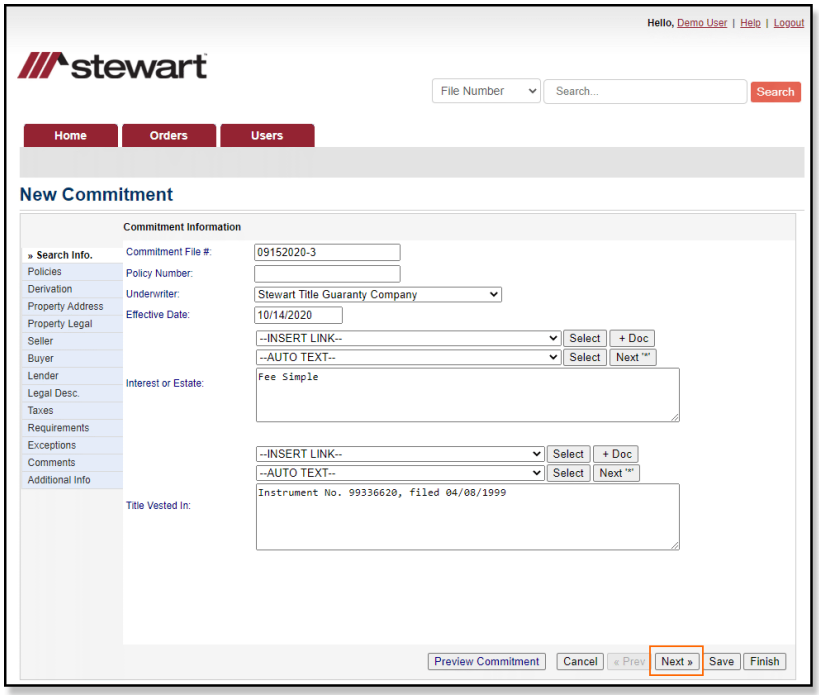
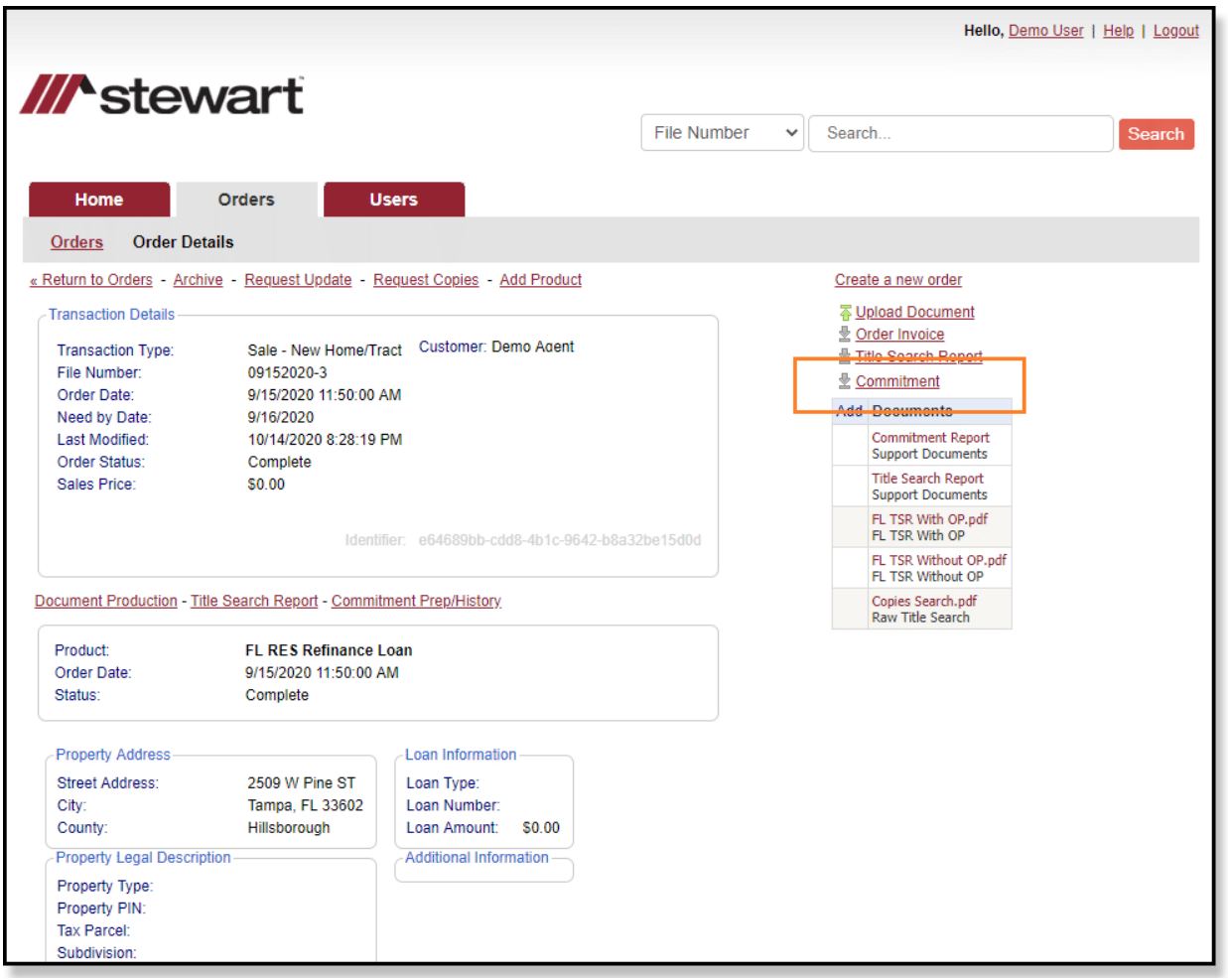
2. Review the report for accuracy.
3. When finished, scroll to the bottom of the report and click **Merge Search data into Commitment Preparation Module**. A confirmation screen displays.

4. On the **Search Info** screen, confirm the search information is correct.

5. Review the terms and click **Agree**. The *Edit Commitment* screens display



6. Review all the subsequent screens until the entire commitment is reviewed. You can select an option from the left menu or click **Next** to advance to the next screen.



7. When the entire commitment is reviewed and approved, click **Finish**. You are returned to the *Order Details* screen. Notice the new commitment link display on the right: **Commitment.** You have created the commitment.