Miscellaneous Changes

The Miscellaneous Change screen contains settings that simply don't fit in well with most of the other screens. They are gathered on this screen for ease of access and functionality. While some settings are unique to this page, others are placed here to give you the opportunity to change information initially entered on the file creation screen.

The **Team** field allows you to change the team assigned to the file that was initially chosen at file creation.

Order Type may be assigned or changed here.

Status indicates whether the file is active, closed, or canceled. If the file is in closed or canceled status, the file information will be in read only mode.

The **Client** field allows you to change the entity initially assigned at file creation, or to assign it if one was not added then.

If a **Lookup Number** is not assigned at file creation, one may be assigned or even changed using this field.

Settlement Agency only appears if your account is set up to use it. This indicates what office or company is handling the process and will appear as the settlement agent company on the bottom of page 5 of the CD.

Title Processor/Title Processor 2 indicates which processors are assigned to work the file.

Closer allows you to change the selected company representative who is attending the closing and will appear as the company contact on the bottom of the fifth page of the CD.

Other Employee is any other employee you wish to mark as having a connection to the file.

The **Attorney** is the company attorney, if any, representing the file.

Notary allows you to change or assign the desired notary for the file.

An **Abstractor** may be chosen or changed with this field.

The **Plot Plan Engineer** assigned to the file may be chosen or changed using this field.

Checklist Name allows you to assign a checklist to the file.

Escrow Accounting Type determines whether the file is in Automatic or Manual status. Automatic is selected by default. This forces the file to balance based off the CD or HUD, creating expected funds and disbursements automatically. Changing this to Manual breaks that connection, showing only items that have already been entered or manually created.

Duplicate File changes the color of the file on the Whiteboard. If a lender or broker portal user creates a file and we pick it up as a possible duplicate, this will be marked Yes and file will appear as the selected tertiary color in the user's settings.

Viewable By Clients dictates whether or not the lender can see the file in the portal.

Referred By is initially set at file creation, but can be changed using this field.

FAQ

"I need someone to pull to the fifth page of the CD as the company representative but can't get them to show up there!"

By default, we pull the individual listed as the **Closer** for the file to this location. The easiest way to work with this is to enter each person you want to be able to show in this location in your This Company Rolodex entry as a contact with the business type of **Closer**. This way you can simply select them from the drop-down list.

Alternatively, we could also create a Rule for your company to always pull from a different entry on this screen. Pulling the selected **Attorney**, for example, is a popular request.

*"I want to assign my own file numbers using the **Lookup Number** field but can't get it to pull to documents."*

You can make this change in the Rolodex. In the This Company entry you will find a setting labeled Use Lookup Number. This defaults to No. If you change this to Yes documents will pull the **Lookup Number** that you assign to the file instead of the File Number the system automatically assigns. Bear in mind that if the **Lookup Number** is left blank in a file any documents you generate will also have blanks.