

Customer information set-up sheet

General Notes/Comments

Order Routing - Orders can be routed to one general email box for "all" customers of the Direct Operation Branch or to the EO who is chosen by the customer.

Username/Passwords - Users email address is set up as their username, and passwords are chosen/set by the user through an activation link sent once setup is complete

Products Ordered - Products are limited to what is shown below(Line 33). Customer can notate additional information pertaining to a product offered by the Direct Operation Branch in the additional notes field of the order entry tab/screen on the CWP if applicable.

Additional Calyx Products Ordered - Additional products not listed can be added for "Calyx users" only to Line(s) 43-45.

Rate Calculator - Customer is provided a "temporary" password for the CWP rate calculator once setup is complete. Customer will be required to login to the rate calculator with their CWP username (email address) and set their temporary password to something personal. They can set this password to be the same as the password they have set on the CWP so that they are both the same.

Direct Operation Information

Direct Operation Branch (full address, phone)	Email address for order routing <small>this is the email address that open orders from the CWP will be sent to on all customers for branch (if preferred route is not to EO chosen in dropdown)</small>	Direct Op Branch Title/Escrow System
County Manager Name		
Branch Manager Name		
Branch Name		
Street address		
City		
State		
Zip Code		
Phone		

Escrow Officer(s) that will be performing work for the customer - add as many as appropriate

Escrow Officer Name	Escrow Officer e-mail address	Escrow Officer Name	Escrow Officer e-mail address
Title Officer Name	Title Officer e-mail address	Title Officer Name	Title Officer e-mail address
Sales Executive Name	Sales Executive e-mail address		

Customer Information

Full legal entity name	Customer Loan Origination System (LOS)	Misc. Comments
Street address		
City		
State		
Zip Code		
Phone		

Products to be ordered	YES	NO	Customer User name(s) who will access web site	e-mail addresses	Phone Number
Commitment					
Preliminary Report					
Property Report					
LCP					
Equity Junion Loan Policy					
O & E					
PIRT					
Search Documents					
Tract Search					
Title & Escrow					
Title Only					
Escrow Only					
Additional Calyx Products to be ordered	YES	NO			

Note: Please attach a separate list of fee's if providing both purchase and refinance rate quotes for your Customer.

State	Title Fees			Escrow Fees			Recording Fee	Lender Fees	
	Title Fees	Search Fee	Endorsements Included list exact Endorsement Names/Form #'s	Escrow Fee	Ancillary Fee Name	Ancillary Fee Amount	# Pages Used	Fee Name	Fee Amount

Direct Operation Person Completing Form

Name	
Phone #	
e-mail address	
Cost Center	
Date	

