



DRI *Online*

How-To Guide

17-JUL-2006 Version

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Logging In

Your web browser will automatically redirect you to the login screen when you visit <https://www.drititle.com/DRIOOnline/>. Enter your username and password and click the "Login" button.



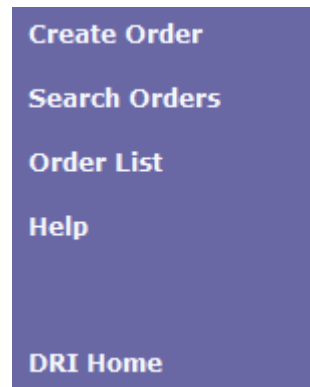
Note: If you've forgotten your username and/or password then please use the "Lost Password?" link provided on the login page to have it emailed to you. If you need to set up an additional username or delete an existing one, then please contact DRI Title & Escrow at 866.932.4670 or webmaster@drititle.com.

Your Menu Options

At the left side of the browser window you will see three menu buttons: Create, Search, and List.

- **Create Order:** You will create and enter new orders.
- **Search Orders:** You can search your existing orders using a variety of search criteria.
- **Order List:** You can list your existing orders filtered by date range.
- **Help:** Will open a PDF file containing this manual.

Whatever you are currently doing on **DRI Online**, the site navigation menu will always be available to you in the left-hand margin.



Create Order

Click the "Create" button located on the site navigation menu. You will be taken to the order entry form. Your view of the order entry from may differ depending on the products available to you. Please examine the sample to the right.

Some fields are required and are marked to indicate that fact. If you fail to fill the required fields out you will be prompted to do so. The optional fields can be left blank; however, if they are filled out then they must contain valid data (e.g. Cell phone is optional, but if you do fill it out then it needs to be a valid phone number).

Please refrain from filling-in fields with data like "none", "n/a", or "nil".

Creating an Order

Loan Information

1. **LOAN/REF#**: Provide a loan/reference number. This is your internal tracking number for this order. This field is required.
2. **LOAN AMT**: The amount, in dollars, of the loan. This field is optional.
3. **PURCHASE TYPE**: The type of purchase. This field is optional. Available types are as follows:
 - Purchase
 - Refinance
 - Second Mortgage
 - Home Equity
 - Foreclosure
 - Other
4. **LOAN TYPE**: The type of loan. This field is optional. Available types are as follows:
 - Conventional
 - VA
 - FHA
 - Other

Create Order::Step 2

Create a New Order
Note: * denotes a required field.

Loan Information	Products
Loan/Ref#: * <small>The loan/reference number must be unique (e.g. A combination of the last name and SSN, your unique internal file number, etc.).</small>	You must choose at least one product.
Loan Amt:	-- Appraisal --
Loan Type: -- Select One --	-- Closings --
Purchase Type: -- Select One --	-- Credit Report --
	-- Deeds --
	-- Document Preparation --
	-- Document Retrieval --
	-- Escrow --
	-- Flood --
	-- Recordings --
	-- Searches --
	-- Tax --
	-- Title --

Closing Information

Closing Date:
Closing Time: -- Select --

Borrower Information

* Borrower:
Name (first / middle / last) :
SSN:

Co-Borrower (If Any):
Name (first / middle / last) :
SSN:

Contact Numbers
When ordering appraisals (except AVMs), please provide a contact number for the homeowner.

Home Phone:
Work Phone:
Cell Phone:

Address to be Searched

Street: *
City: *
County:
State: -- Select -- *
Zip Code: *
Property Type: RESIDENTIAL

Order Instructions

Closing Information

1. **CLOSING DATE:** The date the closing is scheduled or tentatively schedule for. This field is optional.
2. **CLOSING TIME:** The time the closing is scheduled or tentatively scheduled for. Times are listed from 7:00 AM to 8:45 PM. This field is optional.

Products

1. The various product groupings and their respective products are shown. You must select at least one product.

Borrower Information

1. **NAME:** The borrower's name. The first name goes in the first field, the middle name or middle initial goes in the second field, and the last name or surname goes in the third field. First and Last Name are required. Middle Name/Initial is optional.
2. **SSN:** The borrower's Social Security Number. This field accepts numbers only, no dashes or spaces. This field is optional.
3. Co-Borrower is optional.
4. **HOME PHONE:** The home telephone number where the borrower and/or co-borrower can be reached. This field is optional.
5. **WORK PHONE:** The work telephone number where the borrower and/or co-borrower can be reached. This field is optional.
6. **CELL PHONE:** The cellular/mobile telephone number where the borrower and/or co-borrower can be reached. This field is optional.
7. **ADDRESS:** The street address that this order applies to. This field is required.
8. **CITY:** The city that this order applies to. This field is required.
9. **COUNTY:** The county or parish that this order applies to. This field is optional.
10. **STATE:** The state that this order applies to. This field is required.
11. **ZIP CODE:** The Zip Code that this order applies to. This field is required.

Order Instructions

1. Any special instructions or notes for this order should go here. This field is optional.

Submitting the New Order

When you are finished with your data entry for the new order, just click the "Submit Order" button at the bottom-right of the page.

If your order had any errors (e.g. required fields not filled-out or filled-out with invalid data) then you will be notified of the errors and asked to make corrections. Once the corrections have been made, simply resubmit the form using the "Submit Order" button at the bottom-right of the page.

Confirmation of the New Order

Upon successful submission of the new order you will receive a pop-up alert message confirming the order was received and providing you with your order number(s).

After you have closed the pop-up confirmation window you will be redirected to the order entry screen so that you can enter additional orders.

Create Order::Confirmation

DRI Title & Escrow Order Confirmation

Order Placed: 7/14/2006 6:18:50 PM

Your Reference/Loan Number: DEEDTEST001

Customer: TESTER, TEST E
12000 I ST STE 20-100
OMAHA NE 68137

Order ID and Product: 1000934 - Deeds :: test deed

Received Via: DRI's Online Order Management System
<https://www.drititle.com/DRIOOnline/login.aspx>

Thank you for your order! You will be receiving a confirmation email shortly for your records. If you need anything, then please contact us at:

DRI Title & Escrow, Inc.
12000 I ST STE 20-100
OMAHA, NE 68137

Phone: (866) 932-4670
Fax: (866) 932-4673
Email: orders@drititle.com

OK

A confirmation email will be sent to the user entering the order.

Search Orders

Search Criteria

Click the "Search" button located on the site navigation menu. You will be taken to the search criteria form. Here you can search by:

- Borrower Last Name
- Social Security Number (no dashes or spaces)
- Client's Reference ID (Your loan or reference number)
- DRI's Order ID
- Status (Any, Done, Pending, Cancelled)
- Date Range

Select at least one search criterion and then click the "Search" button to retrieve your results. Depending on how many orders are being returned by your search, the results screen may appear instantly or take several seconds.

Search Results

The results of your search will be displayed alphabetically by borrower last name in list format with the following columns: Loan/Reference Number, Borrower Name, Order Status, and a link to view the details of the order.

Locate the order you want to see and then click the "view" link to see an overview page of that order. If the order you were seeking was not found, then click the "Search" link in the navigation menu to your left and you will be taken back to the Search Criteria page.

Client's Reference ID	Borrower's Name	Status	View
04205563	TILDEN, ROBERT AND TILDE...	Pending	view
3010859	Tilfah, Shawkat A AND Ma...	Pending	view
1031085496	TILFORD, MARK AND TILFO...	Done	view
101061	Tilghman, Perry	Pending	view
18223279	Tiller, Michael J AND Vi...	Pending	view
121012	Tillery, Crystal E	Done	view
TILLERY	TILLERY, THOMAS AND TILL...	Done	view
83072	Tillett, Mark	Done	view
91561	Tilley, Arthur	Done	view
79976	Tilley, Edgar	Done	view
3005453	Tilley, Jennifer J	Done	view
99508659	TILLEY, KIM LEE AND TI...	Cancelled	view
27120553	Tilley, Kim L AND Vivian...	Done	view
3008090	Tilley, Scott M AND Chri...	Done	view
65400652	Tillis, Darren	Done	view
079016481	Tillis, Roy Jeremy	Done	view
13924587	TILLMAN SR., KENNETH I ...	Done	view
210893	Tillman, David E AND Har...	Pending	view
92134	Tillman, James K	Done	view
84225	Tillman, Jase B	Done	view
87817	Tillman, John E	Done	view
83204	Tillman, Larry	Done	view
5982241	TILLMAN, PEGGY	Done	view
6017076	TILLMAN, PEGGY	Done	view
079009443	Tillman, Tim J AND Pamil...	Done	view
16403576	TILLOTSON, RICHARD	Done	view
117540	Tilson, Renee L	Done	view
TILTON7402b	TILTON, DAWN R	Done	view
Tilton7402	TILTON, DAWN R & KENDALL...	Done	view
TILTON7402	Tilton, Kendall S	Done	view

Order List

Date Range

Click the "List" button located on the site navigation menu. You will be taken to the list form. Here you can select what date range to list orders from.

The available date ranges are:

- Day
- Week
- Month
- 90 Days
- 180 Days
- Year

Order List

Display Orders Listing

Select the desired date range below. When you are finished click the "List Orders" button.

Retrieve orders from:

LIST ORDERS

List Results

The list of orders for the date range you specified will be displayed alphabetically by borrower last name in list format with the following columns: Loan/Reference Number, Borrower Name, Order Status, and a link to view the details of the order.

Locate the order you want to see and then click the "View Details" link to see an overview page of that order. If the order you were seeking was not found, then click the "List" link in the navigation menu to your left and you will be taken back to the Date Range page.

Order List

Order Listing: 30 Record(s)

Client's Reference ID	Borrower's Name	Status	View
04205563	TILDEN, ROBERT AND TILDE...	Pending	view
3010859	Tilfah, Shawkat A AND Ma...	Pending	view
1031085496	TILFORD, MARK AND TILFO...	Done	view
101061	Tilghman, Perry	Pending	view
18223279	Tiller, Michael J AND Vi...	Pending	view
121012	Tillery, Crystal E	Done	view
TILLERY	TILLERY, THOMAS AND TILL...	Done	view
83072	Tillett, Mark	Done	view
91561	Tilley, Arthur	Done	view
79976	Tilley, Edgar	Done	view
3005453	Tilley, Jennifer J	Done	view
99508659	TILLEY, KIM LEE AND TI...	Cancelled	view
27120553	Tilley, Kim L AND Vivian...	Done	view
3008090	Tilley, Scott M AND Chri...	Done	view
65400652	Tillis, Darren	Done	view
079016481	Tillis, Roy Jeremy	Done	view
13924587	TILLMAN SR., KENNETH I ...	Done	view
210893	Tillman, David E AND Har...	Pending	view
92134	Tillman, James K	Done	view
84225	Tillman, Jase B	Done	view
87817	Tillman, John E	Done	view
83204	Tillman, Larry	Done	view
5982241	TILLMAN, PEGGY	Done	view
6017076	TILLMAN, PEGGY	Done	view
079009443	Tillman, Tim J AND Pamil...	Done	view
16403576	TILLOTSON, RICHARD	Done	view
117540	Tilson, Renee L	Done	view
TILTON7402b	TILTON, DAWN R	Done	view
Tilton7402	TILTON, DAWN R & KENDALL...	Done	view
TILTON7402	Tilton, Kendall S	Done	view

Order Information

When you click the "View Details" link after using the Search or List functions of the site you will be brought to the Order Overview page. This page shows the general information for a customer and any products ordered by that customer that share the same loan/reference number.

Order Information		GARY HITCHCOCK			
DRI Order ID:	1000115				
Property Address:	1173 FIRST ST. CHAPPELL, NE 69129				
Purchase Type:	n/a				
Loan Type:	n/a				
Loan Amount:	n/a				
Products					
Order ID	Type	Product	Docs	Msg	Status
1000115-184	Searches	TWO OWNER SEARCH	Yes	No	Done
1000115-918	Recordings	RECORDATION	No	No	Obtain Recording Information
Add a Product to this Order					
Add a Product:		-- Products --			<input type="button" value="Add"/>

Click on the borrower's name at the top of the frame to view the address of the borrower(s).

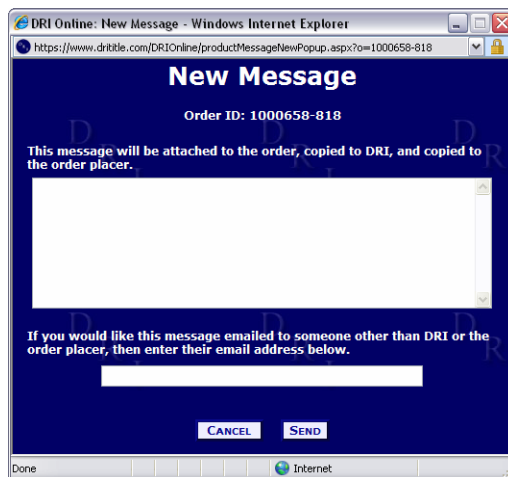
All of the individual product orders associated with this customer are listed under the "Products Ordered" heading with the following columns:

- Order ID: DRI Title & Escrow's internal tracking number for that product order.
- Type: The overall category that this product order falls under.
- Product: The specific name of the product ordered.
- Docs: Indicates whether or not there are any imaged documents available online for that product order.
- Msg: Indicates whether or not there are any messages/notes relating to that product order.
- Status: Shows what status the order is currently in. These are color coded so that the status for completed orders is shown in green, pending orders in orange, and cancelled orders in red.

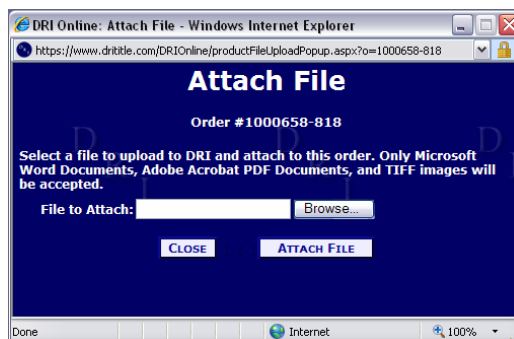
To get a more detailed view of each product order just click on the Order ID column for the order you wish to see the details of.

To order additional products for this customer, simply select what product you would like to add from the drop-down menu at the bottom of the page and then click the "Add" button.

To add a new message, just click the "Add a Message" link and a pop-up window containing the new message form will be displayed. Any message written here will be attached to the order. It will also be email to the party who placed the order. A textbox is provided if you wish to email the message to a third party.



If you want to attach a file to this order, then click the "Upload a File" link located above the files listing. You will be presented with a pop-up window where you can select a file to upload and attach to the order.



Support

We hope that you find DRI Title & Escrow's Online Order Management System to be simple and handy.

- ◆ If you have any suggestions for improvements, any questions about the site, or encounter any site-related problems or errors, then please contact DRI Title & Escrow's IT team at (866) 932-4670 or programmer@drititle.com.
- ◆ If you have any questions about your order(s) please contact DRI Title & Escrow using the "View Contacts" link at the top of each page of the site. You can also email orders@drititle.com or call us toll-free at (866) 932-4670.