



Tips and Tricks to Make Path Work for You

We know that the numerous screens and functions in Path can be intimidating to beginner users, but don't worry, here are ways to perform some of the most common tasks in Path, in simple and easy-to-follow steps.

Use these tips and tricks to take advantage of the vast resources provided in Path

Changing Title Company Name

To change the company name for one or multiple title fees in (section **C. Services Borrower Can Shop For**) follow the steps below.

1. Go to **Production > Closing Costs > Fees** and select the checkbox(es) of the title fee(s).
2. Click the **Change Contact** button.

Note: Only select fees that start with *Title*.

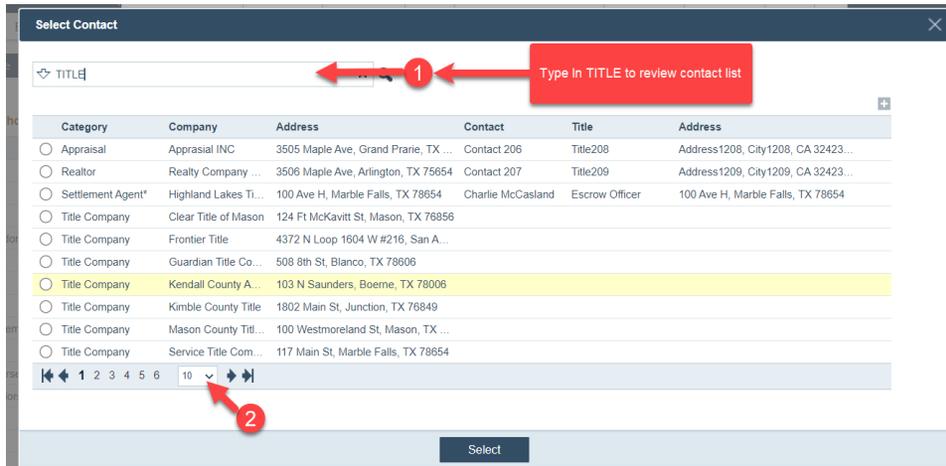
The screenshot shows the Path Software interface. At the top, there is a navigation bar with tabs: Production, Lock, Compliance, Conditions, Documents, Checklist, Interfaces, and Messages. Below this is a sub-navigation bar with tabs: Send/Status, Summary, Borrower, Property, Product & Pricing, Transactions, Closing Costs (highlighted with a red circle 1), Profile, Contacts, and Loan Transmittal. The main content area shows a table of fees under the heading 'C. Services Borrower Can Shop For'. The table has columns: Charge, Paid To, Company, Paid By, APR, POC, and Amount. Several rows are checked, including 'Title - Closing/Escrow Fee', 'Title - Lender's Title Insurance', 'Title - State Guaranty Fee', 'Title - Due and Not Payable Endorsement', 'Title - Courier Fee', 'Title - Notary Fees', 'Title - T-30 Tax Deletion Endorsement', 'Title - T-17 PUD Endorsement', 'Title - T-36 Environmental Endorsement', and 'Title - T-19 Survey Deletion Endorsement'. A red circle 2 is around the 'Charge' column header. At the bottom of the table, there is a 'Change Contact' button highlighted with a red box and a red circle 3. Below the table, there is a summary row 'D. Total Loan Costs (A + B + C)' with a total amount of \$5,112.10. At the very bottom, there is a navigation bar with buttons: Restore Fees, Compare Fees, Change Contact, Delete, Save, and Form Library.

Charge	Paid To	Company	Paid By	APR	POC	Amount
<input checked="" type="checkbox"/> Title - Closing/Escrow Fee	Other	Fidelity Abstract & Title	Borrower	No	No	\$ 450.00
<input checked="" type="checkbox"/> Title - Lender's Title Insurance	Other	Fidelity Abstract & Title	Borrower	No	No	\$ 0.00
<input checked="" type="checkbox"/> Title - State Guaranty Fee	Other	Fidelity Abstract & Title	Borrower	No	No	\$ 2.00
<input checked="" type="checkbox"/> Title - Due and Not Payable Endorsement	Other	Fidelity Abstract & Title	Borrower	No	No	\$ 5.00
<input checked="" type="checkbox"/> Title - Courier Fee	Other	Fidelity Abstract & Title	Borrower	Yes	No	\$ 50.00
<input checked="" type="checkbox"/> Title - Notary Fees	Other	Fidelity Abstract & Title	Borrower	Yes	No	\$ 250.00
<input type="checkbox"/> Survey	Other		Borrower	No	No	\$ 600.00
<input checked="" type="checkbox"/> Title - T-30 Tax Deletion Endorsement	Other	Fidelity Abstract & Title	Borrower	No	No	\$ 20.00
<input checked="" type="checkbox"/> Title - T-17 PUD Endorsement	Other	Fidelity Abstract & Title	Borrower	No	No	\$ 25.00
<input checked="" type="checkbox"/> Title - T-36 Environmental Endorsement	Other	Fidelity Abstract & Title	Borrower	No	No	\$ 25.00
<input checked="" type="checkbox"/> Title - T-19 Survey Deletion Endorsement	Other	Fidelity Abstract & Title	Borrower	No	No	\$ 50.00
<input type="checkbox"/> Title - Wire Transfer Fee	Other		Borrower	Yes	No	\$ 0.00
<input type="checkbox"/> Title - T 42 Endorsement	Other		Borrower	No	No	\$ 0.00
<input type="checkbox"/> Title - T 42.1 Endorsment	Other		Borrower	No	No	\$ 0.00

After the **Change Contact** button is clicked, the **Select Contact** lightbox appears.

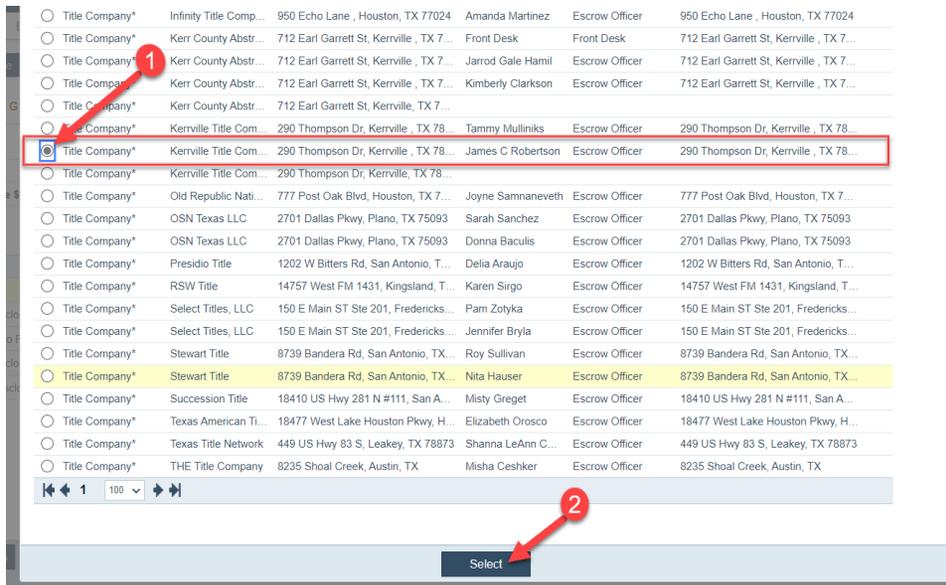


3. Enter *Title* into the search field at the top of the lightbox and click **Enter** on your keyboard.
Next, the title companies are displayed in the table.



Tip: Use the dropdown menu at the bottom of the table to select how many companies to display in the table on one page.

4. Select the title company and click on the **Select** button.





NOTE: After clicking **Select**, the **Contact Details** lightbox appears, displaying the selected title company's information.

A screenshot of a "Contact Details" lightbox window. The window is divided into two columns of form fields. The left column contains fields for Category, Company, Address, Unit Type, City, State, Phone, Toll Free Phone, Fax, Email, Website, License Number, Account Number, and Company Code. The right column contains fields for Contact Name, Title, Address, Unit Type, City, State, Phone, Fax, Email, License Number, License Expiration, License State, Appraiser Code, Supervisor Name, Title, Address, Unit Type, City, State, Phone, Fax, Email, and License Number. A red circle with the number "1" is positioned above a red arrow that points to the "Save" button at the bottom of the lightbox. The "Search" button is also visible at the bottom.

Field	Value
Category	Title Company*
Company	Kerrville Title Company
Address	290 Thompson Dr
Unit Type	[Dropdown] Unit Number [Input]
City	Kerrville
State	TX ZIP 78028
Phone	830-896-5811
Toll Free Phone	[Input]
Fax	830-792-3949
Email	[Input]
Website	[Input]
License Number	1876996
Account Number	[Input]
Company Code	[Input]
Contact Name	James C Robertson
Title	Escrow Officer
Address	290 Thompson Dr
Unit Type	[Dropdown] Unit Number [Input]
City	Kerrville
State	TX ZIP 78028
Phone	(830) 896-5811
Fax	[Input]
Email	crobertson@kerrvilletitle.com
License Number	1304697
License Expiration	[Input]
License State	[Input]
Appraiser Code	[Input]
Supervisor Name	James C Robertson
Title	Escrow Officer
Address	290 Thompson Dr
Unit Type	[Dropdown] Unit Number [Input]
City	Kerrville
State	TX ZIP 78028
Phone	(830) 896-5811
Fax	[Input]
Email	crobertson@kerrvilletitle.com
License Number	1304697

5. Review the displayed information and click **Save**.
The company name has changed to the selected title company



Production Lock Compliance Conditions Documents Checklist Interfaces Messages

Send/Status Summary Borrower Property Product & Pricing Transactions Closing Costs Profile Contacts Loan Transmittal

Fees	Summary	Loan Estimate	Service Providers	Closing Disclosure	Summaries of Transaction	Payoffs/Payments	Additional Information	Escrows
<input type="checkbox"/>	VA Funding Fee						Borrower Yes No	\$ 0.00
<input type="checkbox"/>	Tax Service Fee		Other		Lereta		Borrower Yes No	\$ 95.00
<input type="checkbox"/>	Credit Report Fee		Other		Equifax Mortgage Services		Borrower No No	\$ 105.00
<input type="checkbox"/>	Flood Certification Fee		Other				Borrower Yes No	\$ 10.10
<input type="checkbox"/>	Attorney Doc Prep Fee		Other		PPDocs, Inc.		Borrower Yes No	\$ 250.00
<input type="checkbox"/>	Appraisal Fee		Other				Borrower No No	\$ 850.00
<input type="checkbox"/>	Final Inspection Fee		Other				Borrower No No	\$ 200.00

C. Services Borrower Can Shop For Total: \$ 1,477.00

Charge	Paid To	Company	Paid By	APR	POC	Amount
<input type="checkbox"/>	Title - Closing/Escrow Fee	Kerrville Title Company	Borrower	No	No	\$ 450.00
<input type="checkbox"/>	Title - Lender's Title Insurance	Kerrville Title Company	Borrower	No	No	\$ 0.00
<input type="checkbox"/>	Title - State Guaranty Fee	Kerrville Title Company	Borrower	No	No	\$ 2.00
<input type="checkbox"/>	Title - Due and Not Payable Endorsement	Kerrville Title Company	Borrower	No	No	\$ 5.00
<input type="checkbox"/>	Title - Courier Fee	Kerrville Title Company	Borrower	Yes	No	\$ 50.00
<input type="checkbox"/>	Title - Notary Fees	Kerrville Title Company	Borrower	Yes	No	\$ 250.00
<input type="checkbox"/>	Survey	Kerrville Title Company	Borrower	No	No	\$ 600.00
<input type="checkbox"/>	Title - T-30 Tax Deletion Endorsement	Kerrville Title Company	Borrower	No	No	\$ 20.00
<input type="checkbox"/>	Title - T-17 PUD Endorsement	Kerrville Title Company	Borrower	No	No	\$ 25.00
<input type="checkbox"/>	Title - T-36 Environmental Endorsement	Kerrville Title Company	Borrower	No	No	\$ 25.00
<input type="checkbox"/>	Title - T-19 Survey Deletion Endorsement	Kerrville Title Company	Borrower	No	No	\$ 50.00
<input type="checkbox"/>	Title - Wire Transfer Fee	Kerrville Title Company	Borrower	Yes	No	\$ 0.00
<input type="checkbox"/>	Title - T 42 Endorsement	Kerrville Title Company	Borrower	No	No	\$ 0.00
<input type="checkbox"/>	Title - T 42.1 Endorsment	Kerrville Title Company	Borrower	No	No	\$ 0.00

D. Total Loan Costs (A + B + C) Total: \$ 5,112.10

Restore Fees Compare Fees Change Contact Delete **Save** Form Library

- If a title company is not found through the above steps, you can add it to the loan via **Production > Contacts > Loan Contacts**.

A screenshot of the Path Software interface. At the top, there is a navigation bar with tabs for Production, Lock, Compliance, Conditions, Documents, Checklist, Interfaces, and Messages. Below this is a secondary navigation bar with tabs for Send/Status, Summary, Borrower, Property, Product & Pricing, Transactions, Closing Costs, Profiles, Contacts, and Loan Transmittal. The 'Contacts' tab is highlighted with a red box and a red circle containing the number '1'. Below the navigation is a 'Loan Contacts' section with a sub-tab 'All Contacts'. A 'Comment' text area is visible. The main form is divided into two columns: 'Title Company' and 'Settlement Agent'. The 'Title Company' section is highlighted with a red box and a red circle containing the number '2'. The 'Settlement Agent' section has a checkbox labeled 'Same as Title Information'. At the bottom of the form, there is a 'Save' button highlighted with a red box and a red circle containing the number '3', along with buttons for 'Delete', 'Change Loan Originator', and 'Template'.

Note: Adding a title company (or any entity) to your organization's contact list requires your system administrator to add it via **Settings > Contacts**. After it has been added to **Settings > Contacts**, you will be able to search for and find it via the above steps.