

## 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.

Send/Status Summary Borro	wer Property	Product & F	Pricing Trans		Closing Costs	Profile	Conta	icts	Loan	Transmittal	∻
ees Summary Loan Estimate Se	vice Providers Closi	na Disclosure	Summaries of T	ansaction	Pavoffs/Pavments		nal Informa	ation F	scrow		
Final Inspection Fee	Other	ng bibelobare	Caminanco or n	ansaction	Bor	rower	No	No	\$	200	0.00
C. Services Borrower Can Shop Fo	r							Total	\$	1,477.00	÷
barge	Paid To		Compan	y	Pai	d By	APR	POC		Amo	ount
Life - Closing/Escrow Fee	Other		Fidelity A	bstract & Title	Bor	rower	No	No	s	450	0.00
Title - Lender's Title Insurance	Other		Fidelity A	bstract & Title	Bor	rower	No	No	\$	(	0.00
Title - State Guaranty Fee	Other		Fidelity A	bstract & Title	Bor	rower	No	No	s	2	2.00
Title - Due and Not Payable Endorseme	nt Other		Fidelity A	bstract & Title	Bor	rower	No	No	\$	ŧ	5.00
Title - Courier Fee	Other		Fidelity A	bstract & Title	Bor	rower	Yes	No	\$	50	0.00
Title - Notary Fees	Other		Fidelity A	bstract & Title	Bor	rower	Yes	No	\$	250	0.00
Survey	Other				Bor	rower	No	No	\$	600	0.00
Title - T-30 Tax Deletion Endorsement	Other		Fidelity A	bstract & Title	Bor	rower	No	No	\$	20	0.00
Title - T-17 PUD Endorsement	Other		Fidelity A	bstract & Title	Bor	rower	No	No	\$	25	5.00
Title - T-36 Environmental Endorsement	Other		Fidelity A	bstract & Title	Bor	rower	No	No	\$	25	5.00
Title - T-19 Survey Deletion Endorseme	nt Other		Fidelity A	bstract & Title	Bor	rower	No	No	\$	50	0.00
Title - Wire Transfer Fee	Other				Bor	rower	Yes	No	\$	(	0.00
Title - T 42 Endorsement	Other				Bor	rower	No	No	\$	(	0.00
Title - T 42.1 Endorsment	Other	3			Bor	rower	No	No	\$	(	0.00
D. Total Loan Costs (A + B + C)								Total	: <b>s</b>	5,112.10	

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.

Select Contact						
🕹 गागाच्		<b>←−−</b> 0∢	тур	e In TITLE to rev	view contact list	Ð
Category	Company	Address	Contact	Title	Address	
O Appraisal	Apprasial INC	3505 Maple Ave, Grand Prarie, TX	Contact 206	Title208	Address1208, City1208, CA 32423	
O Realtor	Realty Company	3506 Maple Ave, Arlington, TX 75654	Contact 207	Title209	Address1209, City1209, CA 32423	
<ul> <li>Settlement Age</li> </ul>	ent* Highland Lakes Ti	100 Ave H, Marble Falls, TX 78654	Charlie McCasland	Escrow Officer	100 Ave H, Marble Falls, TX 78654	
O Title Company	Clear Title of Mason	124 Ft McKavitt St, Mason, TX 76856				
O Title Company	Frontier Title	4372 N Loop 1604 W #216, San A				
O Title Company	Guardian Title Co	508 8th St, Blanco, TX 78606				
O Title Company	Kendall County A	103 N Saunders, Boerne, TX 78006				
O Title Company	Kimble County Title	1802 Main St, Junction, TX 76849				
O Title Company	Mason County Titl	100 Westmoreland St, Mason, TX				
O Title Company	Service Title Com	117 Main St, Marble Falls, TX 78654				
<b>♦ ♦ 1</b> 2 3 4	5 6 10 🖌 🔶 🔶					
	2					
			Select			

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.

	0	Title Company*	Infinity Title Comp	950 Echo Lane , Houston, TX 77024	Amanda Martinez	Escrow Officer	950 Echo Lane , Houston, TX 77024
	0	Title Company*	Kerr County Abstr	712 Earl Garrett St, Kerrville , TX 7	Front Desk	Front Desk	712 Earl Garrett St, Kerrville , TX 7
	0	Title Company*	Kerr County Abstr	712 Earl Garrett St, Kerrville , TX 7	Jarrod Gale Hamil	Escrow Officer	712 Earl Garrett St, Kerrville , TX 7
11	0	Title Compar	Kerr County Abstr	712 Earl Garrett St, Kerrville , TX 7	Kimberly Clarkson	Escrow Officer	712 Earl Garrett St, Kerrville , TX 7
	0	Title Crupany*	Kerr County Abstr	712 Earl Garrett St, Kerrville, TX 7			
	0	e Company*	Kerrville Title Com	290 Thompson Dr, Kerrville , TX 78	Tammy Mulliniks	Escrow Officer	290 Thompson Dr, Kerrville , TX 78
	0	Title Company*	Kerrville Title Com	290 Thompson Dr, Kerrville , TX 78	James C Robertson	Escrow Officer	290 Thompson Dr, Kerrville , TX 78
1	0	Title Company*	Kerrville Title Com	290 Thompson Dr, Kerrville, TX 78			
6	0	Title Company*	Old Republic Nati	777 Post Oak Blvd, Houston, TX 7	Joyne Samnaneveth	Escrow Officer	777 Post Oak Blvd, Houston, TX 7
	0	Title Company*	OSN Texas LLC	2701 Dallas Pkwy, Plano, TX 75093	Sarah Sanchez	Escrow Officer	2701 Dallas Pkwy, Plano, TX 75093
	0	Title Company*	OSN Texas LLC	2701 Dallas Pkwy, Plano, TX 75093	Donna Baculis	Escrow Officer	2701 Dallas Pkwy, Plano, TX 75093
1	0	Title Company*	Presidio Title	1202 W Bitters Rd, San Antonio, T	Delia Araujo	Escrow Officer	1202 W Bitters Rd, San Antonio, T
	0	Title Company*	RSW Title	14757 West FM 1431, Kingsland, T	Karen Sirgo	Escrow Officer	14757 West FM 1431, Kingsland, T
D	0	Title Company*	Select Titles, LLC	150 E Main ST Ste 201, Fredericks	Pam Zotyka	Escrow Officer	150 E Main ST Ste 201, Fredericks
	0	Title Company*	Select Titles, LLC	150 E Main ST Ste 201, Fredericks	Jennifer Bryla	Escrow Officer	150 E Main ST Ste 201, Fredericks
	0	Title Company*	Stewart Title	8739 Bandera Rd, San Antonio, TX	Roy Sullivan	Escrow Officer	8739 Bandera Rd, San Antonio, TX
	0	Title Company*	Stewart Title	8739 Bandera Rd, San Antonio, TX	Nita Hauser	Escrow Officer	8739 Bandera Rd, San Antonio, TX
	0	Title Company*	Succession Title	18410 US Hwy 281 N #111, San A	Misty Greget	Escrow Officer	18410 US Hwy 281 N #111, San A
Ι.	0	Title Company*	Texas American Ti	18477 West Lake Houston Pkwy, H	Elizabeth Orosco	Escrow Officer	18477 West Lake Houston Pkwy, H
	0	Title Company*	Texas Title Network	449 US Hwy 83 S, Leakey, TX 78873	Shanna LeAnn C	Escrow Officer	449 US Hwy 83 S, Leakey, TX 78873
	0	Title Company*	THE Title Company	8235 Shoal Creek, Austin, TX	Misha Ceshker	Escrow Officer	8235 Shoal Creek, Austin, TX
	H	🔶 1 🛛 100 🗸 🔶	*			0	
Ľ						2	
					Select		



Contact Details								>	
Category	Title Company*			Contact Name	James C Robertson				
Company	Kerrville Title Comp	oany		Title	Escrow Officer				
Address	290 Thompson Dr			Address	290 Thompson	Dr			
Unit Type	~	Unit Numbe	er 🛛	Unit Type	~	✓ Unit Number			
City	Kerrville			City	Kerrville				
State	TX	ZIP	78028	State	TX	ZIP	78028		
Phone	830-896-5811			Phone	(830) 896-5811				
Toll Free Phone				Fax					
Fax	830-792-3949			Email	crobertson@ker	rvilletitle.com			
Email				License Number	1304697				
Website				License Expiration					
License Number	1876996			License State					
Account Number				Appraiser Code					
Company Code				Supervisor Name	James C Robert	tson			
				Title					
				Address	290 Thompson Dr				
				Unit Type	~	Unit Numl	ber		
				City	Kerrville				
				State	TX	ZIP	78028		
				Phone	(830) 896-5811				
				Fax					
	1			Email	crobertson@ker	rvilletitle.com			
				License Number	1304697				
			Save	Search					

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

5. Review the displayed information and click **Save**.

The company name has changed to the selected title company



Production Send/Status	Summary	k Borrower	Property	Product &	Condition Pricing	Transacti	ons Clo	24 using Costs	Profile	Conta	Interla Icts	Loan	M Transmittal	e554
ees Summary	Loan Estimate	Service Pr	oviders Clos	ing Disclosur	e Summ	aries of Trans	action Pay	yolls/Paymer	nts Additio	nal Inform	ation (	Escrow		
VA Funding Fe	10							8	orrower	Yes	No	s		0.00
Tax Service Fe	00	(	Other			Lereta		B	orrower	Yes	No	\$	4	95.00
Credit Report I	Fee	(	Other			Equifax Mort	page Service:	s B	orrower	No	No	s	10	05.00
Flood Certifica	tion Fee	(	Other					B	orrower	Yes	No	\$	1	10.10
Attorney Doc F	Prep Fee		Other			PPDocs, Inc.		B	orrower	Yes	No	\$	25	50.0
Appraisal Fee		(	Other					B	orrower	No	No	\$	85	50.0
Final Inspectio	in Fee		Other					B	orrower	No	No	s	20	0.00
C. Services B Charge	Borrower Can Sh	sop For	Paid To		-	Company		P	aid By	APR	FOC	: \$	1,477.00 Am	oui
Charpe		1	Paid To			Company		P	aid By	APR	POC		Am	our
Title - Closing/	Escrow Fee		Other		_	Kerrville Title	Company	B	orrower	No	No	s	45	50.0
Title - Lender's	Title Insurance	(	Other			Kerrville Title	Company	B	orrower	No	No	\$		0.0
Title - State Gu	uaranty Fee	(	Other			Kerrville Title	Company	B	orrower	No	No	s		2
Title - Due and	Not Payable Ende	orsement (	Other			Kerrville Title	Company	B	orrower	No	No	s		5.
Title - Courier I	Fee		Other			Kerrville Title	Company	B	orrower	Yes	No	\$	5	50.0
Title - Notary F	Fees		Other			Kerrville Title	Company	B	orrower	Yes	No	\$	25	50.0
Survey		(	Other					B	orrower	No	No	s	60	00.0
Title - T-30 Tax	Deletion Endorse	ment (	Other			Kerrville Title	Company	B	orrower	No	No	\$	1	20.
Title - T-17 PU	D Endorsement	(	Other			Kerrville Title	Company	B	orrower	No	No	s	2	25.0
Title - T-36 Em	vironmental Endors	sement (	Other			Kerrville Title	Company	8	orrower	No	No	\$	2	25.1
Title - T-19 Sur	rvey Deletion Endo	orsement (	Other			Kerrville Title	Company	B	orrower	No	No	\$	6	50.0
Title - Wire Tra	ansfer Fee	(	Other					B	orrower	Yes	No	\$		0.0
Title - T 42 End	dorsement	(	Other					B	orrower	No	No	\$		0.0
Title - T 42.1 E	indorsment	(	Other					B	orrower	No	No	\$		0.0
							2							

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



Production		LOCK	Compliance	•	Condition	is ≫ Docu	ments 원	Checklist	A Interfac	es Messa
Send/Status	Summary	Borrower	Property	Produ	uct & Pricing	Transactions	Closing Costs	Profile	Contacts	Loan Transmittal 🛛 🖑
Loan Contacts	All Contacts									
comment										
					2					
> Title Company					T	Settlement Agent	Same as	Title Informat	ion	
Company					ii (	Company				14
Iranch Name						Branch Name				
ranch Number						Branch Number				
ddress						Address				
Init Type				~		Jnit Type				•
nit Number						Jnit Number				
City						City				
itate		✓ ZIP				State	~	ZIP		
hone			Fax			hone		F	ax	
mail					1	Email				
ompany License						Company License				
icense Authority						icense Authority				
uthority URL						Authority URL				
Contact						Contact				
Contact Phone						Contact Phone				
Contact License						Contact License				
order Number						Escrow Number				
Comment						Comment				
				-	_					

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.