



## Job Aid: Service Orders in ClosingVue™

The purpose of this document is to show you how to create and edit a Service Order. Before creating your Service Order, you must set up your file by entering the property address, all parties to the transaction (including Lender), and the loan amount/sales price.

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### Enter Service Order Information

1. From the **Maintain File** menu, click **Property Information**

2. Click **First American Title Service Order** link in the **Partner Services** area



3. Select an option in the **Transaction Type** dropdown list
4. Select an option in the **Business Segment** dropdown list

**NOTE:** You will see a loading message on the window and will need to let that message load before selecting your product.

5. Select an option in the **Product** dropdown list

**NOTE:** A **Disclaimer** displays after a

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**Product** selection.

6. Select an option in the **FAST Property Type** dropdown list

7. The user's Email Address will populate in the **Email Notification** field

**NOTE:** Enter multiple Email Addresses by separating them with a semi-colon.

8. Enter the desired information in the **Comments/Additional Information** field

The screenshot shows the First American ClosingVue form. Red circles with numbers 3 through 8 highlight specific fields: 3 points to the Transaction Type dropdown (Sale w/Mortgage), 4 points to the Business Segment dropdown (Residential), 5 points to the Product dropdown (Commitment), 6 points to the FAST Property Type dropdown (Single Family Residence), 7 points to the Email Notifications field (cheffner@firstam.com), and 8 points to the Comment/Additional Information text area (Please Process). Below the form is a disclaimer and a commercial order notice.

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**COMMERCIAL ORDER NOTICE:** Due to varying import limitations with software providers, you must review the word or .pdf versions of the AgentNet Search Product. ASP's with a large number of requirements or exceptions may be truncated by import limitations and review of the word or .pdf will ensure all requirements and exceptions were imported.

**Add Documents**

1. Click

2. Select the desired documents you want to upload

**NOTE:** The **Document** names display, along with the date and time of submittal. Documents that have already been saved in the Documents Management section of a file will also be able to be attached. They will appear on a list, and the box can be checked for any document to attach:

The screenshot shows the First American ClosingVue form. The Comment/Additional Information field is highlighted with a red box and contains the text: "RUSH ORDER; Need by 2/25/2022 Multiple parcels; 2nd parcel APN: 0123-456-789". The Add Documents section is also visible, showing a checkbox for "Backtitle PriorPolicy" and an "Upload File(s)" button. Below the form is a disclaimer and a commercial order notice.

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## Create the Search Order

1. Click **Submit**

**NOTE:** **AgentNet®** is sent the request, the ordering window closes, and the **Order Number** displays upon successful submission of the request.

2. Click  to close the message displaying the **Order Number**

**NOTE:** A preview of the uploaded document opens in a separate window.

## View the File Order Number


The **Order Number** displays on the **File Summary** page. You can also view the **Order Number** on the **Property Information** page.

## Edit a Service Order

1. From the menu from within your file, click **Property Information**

**NOTE:** The **Property Information** page will display.

2. Click the pencil icon

Orders					
SERVICE	DATE ORDERED	ORDER #	PRODUCT	STATUS	ORDERED BY
First American Search Orders	07/07/2023	110032767	AgentNet Search Product	Downloaded - Never	Laura Furia 

3. Add notes

4. Click **Submit**



**NOTE:** The **Notes** you enter are E-mailed to the production unit.



## Import Service Order

1. Scroll to the First American Search Order item in the **Orders** section of the **Property Information** screen and click the icon in the **Upload Results** column

**NOTE:** The status will read **Downloaded – Never** until you import the title search.

Partner Services					
First American Rate The Search					
Orders					
SERVICE	DATE ORDERED	ORDER #	PRODUCT	STATUS	ORDERED BY
First American Search Order	06/06/2025	110006490	Agreement Search Product	Downloaded - Never	Alana Plazant
					Upload Results

2. Click **Yes** to the prompt

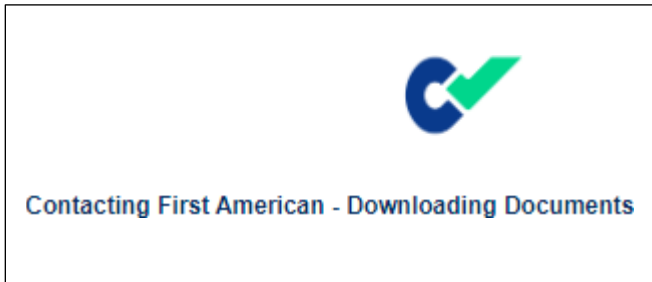
Upload FATIC Order

Are you sure you want to upload the results of this order?

Cancel

Yes

**NOTE:** A loading screen displays as ClosingVue imports the data and the documents from the title search.



Then a message displays that confirms your order was successfully uploaded.

File Contacts Escrow Mgmt Back Office

Order Number: 110006490 has been successfully uploaded.

2023-9004

Property Information

**NOTE:** The status in the orders section now reads **Downloaded** along with the date and time stamp.

Partner Services					
First American Rate The Search					
Orders					
SERVICE	DATE ORDERED	ORDER #	PRODUCT	STATUS	ORDERED BY
First American Search Order	06/06/2025	110006490	Agreement Search Product	Downloaded - Order downloaded via 361177571 at 06:05 AM	Alana Plazant

**NOTE:** Imported data can be confirmed via the **Text Description** menu item.

[illegible]

**NOTE:** Search documents will be saved in the **Document Management** section of your file.

[illegible]

## Submit an Update Request

1. In the property information window, scroll down to the Orders area at the bottom of the screen.

Orders					
SERVICE	DATE ORDERED	ORDER #	PRODUCT	STATUS	ORDERED BY
First American Search Orders	03/21/2025	110668291	AgentNet Search Product	Downloaded - (Order downloaded on 03/21/2025 at 03:53 PM)	Stephanie Gerbec

2. Select the 'edit order' icon.

Orders					
SERVICE	DATE ORDERED	ORDER #	PRODUCT	STATUS	ORDERED BY
First American Search Orders	03/21/2025	110668291	AgentNet Search Product	Downloaded - (Order downloaded on 03/21/2025 at 03:53 PM)	Stephanie Gerbec

3. A pop-up window will appear. Use the drop down to select update (or date down/amendment as needed.)



First American Title™

Update Order

×

UPDATE TYPE

EMAIL NOTIFICATION

COMMENTS

Amend

DateDown

Update

Cancel

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Cancel

Submit

4. The notification field should be completed. You can add multiple recipients if needed by adding a semi colon between email addresses. No spaces are needed. Add any additional comments in the field below.

First American Title™

Update Order

×

UPDATE TYPE

EMAIL NOTIFICATION

COMMENTS

Update

sgerbec@firstam.com

Update request for this file

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Cancel

Submit

5. Select the 'Submit' button to place the update request.



First American Title™

Update Order

×

UPDATE TYPE

Update

▼

EMAIL NOTIFICATION

sgerbec@firstam.com

COMMENTS

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Cancel

Submit

## Import Update Results

1. You will receive an email confirmation from First American when your update is completed.



This is from a Test Office.....Thank you for selecting First American to place your TEST order. Your TEST order is complete and is now available for you to view in your source system.[Click here to navigate to AgentNet file and order](#)

Your File Number: 2025-71

FA Order Number: 110668291

[Click here to download all supporting documents grouped into one ZIP file](#)

Download supporting documents individually:

[Click here to view/access document Agent Update - FL \(pdf\)](#)

[Click here to view/access document Agent Update - FL \(doc\)](#)

If you have any questions regarding your order, please contact Test Customer Service at 727-555-5555 or [testingagentnet@gmail.com](mailto:testingagentnet@gmail.com).

If you have any technical problems, please contact ASC at 1-866-701-3361 or [AgencySupport@firstam.com](mailto:AgencySupport@firstam.com).

You are hereby directed to deliver First American Title Insurance Company's Privacy Policy Notice, Service, Quality and Availability Notice, Reissue Credit Notice and Illegal Restrictive Covenants Notice with the title insurance commitment and policy.

[Privacy Policy](#)

[Service, Quality and Availability](#)

[Reissue Credit Notice](#)

[Illegal Restrictive Covenants Notice](#)

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2. In the property information window, return to the Orders area at the bottom of the screen. You will see the update listed below the initial search request.

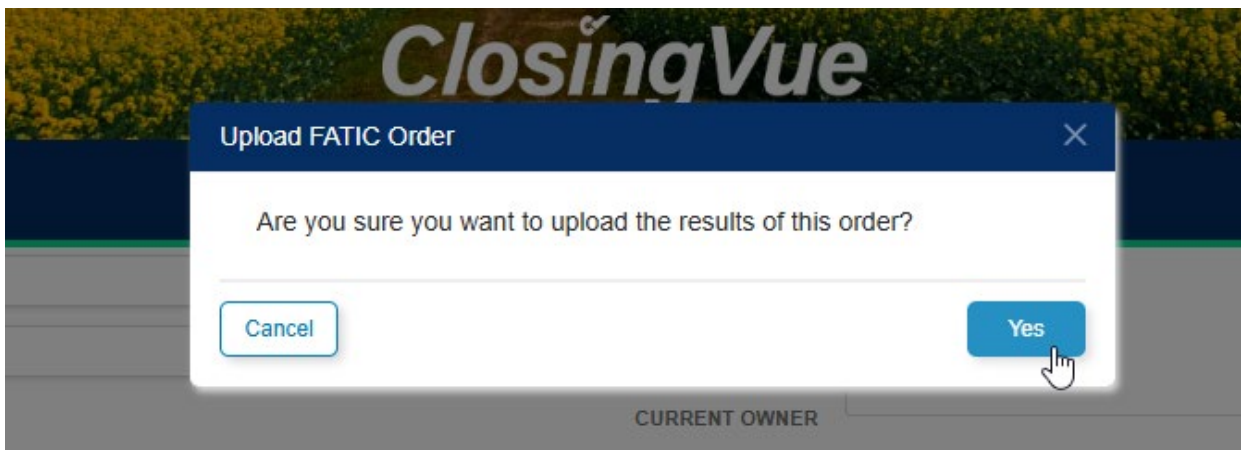
#### Orders

SERVICE	DATE ORDERED	ORDER #	PRODUCT	STATUS	ORDERED BY
First American Search Orders	03/21/2025	110668291	AgentNet Search Product	Downloaded - (Order downloaded on 03/21/2025 at 03:53 PM)	Stephanie Gerbec
First American Search Orders	03/21/2025	110668291-UPDATE	AgentNet Search Product	Downloaded - Never	Stephanie Gerbec

3. To pull in the update, click on the upload button on your initial order.

Orders					
SERVICE	DATE ORDERED	ORDER #	PRODUCT	STATUS	ORDERED BY
First American Search Orders	03/21/2025	110668291	AgentNet Search Product	Downloaded - (Order downloaded on 03/21/2025 at 03:53 PM)	Stephanie Gerbec
First American Search Orders	03/21/2025	110668291-UPDATE	AgentNet Search Product	Downloaded - Never	Stephanie Gerbec

4. You will see a pop-up. Click yes to continue.



5. You will find a copy of the update letter in the documents section.

Scanned/Saved Documents

+ New Folder

FILE NAME ↑	USER	DATE/TIME	FILE SIZE	ACTIONS
<div></div> <div>Alyssa Docs (0)</div>				<div></div> <div></div>
<div></div> <div>Special Docs (0)</div>				<div></div> <div></div>
<div></div> <div>Title Documents (0)</div>				<div></div> <div></div>
<div>Other Documents</div> <div>To move documents out of a folder drag and drop below</div>				
<div></div> <div>Agent Update - FL (.doc)</div>	Stephanie Gerbec	03/21/2025 04:56 PM	0.4 MB	<div></div> <div></div> <div></div>
<div></div> <div>Agent Update - FL (.pdf)</div>	Stephanie Gerbec	03/21/2025 04:56 PM	1.4 MB	<div></div> <div></div> <div></div>
<div></div> <div>AgentNet Search Product 2021 - FL (.doc)</div>	Stephanie Gerbec	03/21/2025 04:56 PM	22 MB	<div></div> <div></div> <div></div>
<div></div> <div>AgentNet Search Product 2021 - FL (.pdf)</div>	Stephanie Gerbec	03/21/2025 04:56 PM	26 MB	<div></div> <div></div> <div></div>

Maintain File

Borrower Information

Financial Information

Seller Information

Property Information

Payoff/Payment Information

Tax/Fee/Pro-ration Info

Insurance Information

Title Policy Information

Chain of Title

Recording Information

Text Description

Miscellaneous Change

Upload Search Results

Documents

Document Management

Notary and Signature Blocks

Upload File

Powered By

E-Closing