

LOGIN

- 1 Go to <https://cqe.entitle.direct/>. The login page would be displayed.
- 2 On the login page, enter your username and password
- 3 Click on *Login* button. The Generate Quote page will be displayed.

The screenshot shows the login interface for the Consolidated Quote Engine (CQE). On the left is a dark blue sidebar with the Entitle Direct logo and tagline. The main content area is light gray and contains the following elements:

- A hamburger menu icon in the top left corner.
- The heading "Welcome to Consolidated Quote Engine".
- A text input field containing "yourusername".
- A password input field with a yellow highlight and a series of dots, with a large orange number "2" to its right.
- A dark blue "Login" button with a large orange number "3" to its right.
- A link: "If you don't have account you can [request one here](#)".
- A footer: "© 2016 - Entitle Direct".

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GENERATE A QUOTE – PURCHASE

If you're not on the quote form page, on the Left menu, click on Quote> Quote form to launch this page.

- 1 On the quote form page, enter the Zip Code. The city and state would be automatically populated into the respective fields.

Note: Optionally, you may also enter the borrower name, and address of the property for which quote is needed

- 2 In the Loan Type field, click on "Purchase". The policy information section will be displayed.

The screenshot displays the 'Quote form' interface. On the left is a dark sidebar with a menu containing 'Quote' (expanded), 'Quote form', 'Previous quotes', and 'Users'. The main content area is titled 'Borrower' and contains the following fields:

- Borrower Name:** Two input fields for 'First name' and 'Last name'.
- Address:** Two input fields, one for the address and one for 'Lakeville'.
- Zip Code*:** An input field containing '06039', highlighted in yellow. To its right is a dropdown menu showing 'CT, Litchfield'.
- Loan Type:** Two radio buttons: 'Refinance' (unselected) and 'Purchase' (selected with a green checkmark).

Below the Borrower section is the 'Policy information' section with the following fields:

- Loan Policy*:** A dropdown menu showing 'ALTA Loan Basic Rate (LP)'.
- Loan Amount*:** An input field with the placeholder text 'Please fill in the loan amount'.
- Owner's Policy*:** A dropdown menu showing 'ALTA Owner's Basic Rate (OP)'.

The top right of the page shows a user greeting: 'Welcome cqe-admin@entitleDirect.com!' and a 'Sign out' link.

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- 3 Within Policy Information, enter the Loan Amount and Sale Price.
- 4 Within Loan Policy Endorsements, some default endorsements have been selected for you. Check additional ones from the ones listed to add them to your quote or uncheck the ones you do not want to add to your quote.

3 Policy information

Loan Policy*

3 Loan Amount*

Owner's Policy*

3 Sale Price*

4 Loan policy endorsements

ER-008.1 Environmental Protection Liens

- ER-001 Street Assessments
- ER-002 Truth In Lending
- ER-003 Zoning
- ER-003.1 Zoning-Completed Structure
- ER-004 Condominium-Loan Policy
- ER-004.1 Condominium-Owners Policy
- ER-005 Planned Unit Development
- ER-005.1 Planned Unit Development

ER-009 Restrictions, Encroachments, Minerals LP

- ER-009.2 Restrictions, Encroachments, Minerals OP
- ER-009.3 Restrictions, Encroachments, Minerals LP
- ER-009.4 Restrictions, Encroachments, Minerals OP
- ER-009.5 Restrictions, Encroachments, Minerals OP
- ER-010 Assignment
- ER-010.1 Assignment and Date Down

- ER-016 Mezzanine Financing
- ER-017 Access and Entry-Direct
- ER-017.1 Access and Entry-Indirect
- ER-018 Single Tax Parcel
- ER-018.1 Multiple Tax Parcels
- ER-019 Contiguity-Multiple Parcels
- ER-019.1 Contiguity-Single Parcel
- ER-020 First Loss

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5 Within Owner Policy Endorsements, select the endorsements you would like to add to the quote.

5 Owner policy endorsements

<input type="checkbox"/> ER-008.1 Environmental Protection Liens	<input type="checkbox"/> ER-009.2 Restrictions,Encroachments,Minerals OP	<input type="checkbox"/> ER-016 Mezzanine Financing
<input type="checkbox"/> ER-009 Restrictions,Encroachments,Minerals LP	<input type="checkbox"/> ER-009.3 Restrictions,Encroachments,Minerals LP	<input type="checkbox"/> ER-017 Access and Entry-Direct
<input type="checkbox"/> ER-001 Street Assessments	<input type="checkbox"/> ER-009.4 Restrictions,Encroachments,Minerals OP	<input type="checkbox"/> ER-017.1 Access and Entry-Indirect
<input type="checkbox"/> ER-002 Truth In Lending	<input type="checkbox"/> ER-009.5 Restrictions,Encroachments,Minerals OP	<input type="checkbox"/> ER-018 Single Tax Parcel
<input type="checkbox"/> ER-003 Zoning	<input type="checkbox"/> ER-010 Assignment	<input type="checkbox"/> ER-018.1 Multiple Tax Parcels
<input type="checkbox"/> ER-003.1 Zoning-Completed Structure	<input type="checkbox"/> ER-010.1 Assignment and Date Down	<input type="checkbox"/> ER-019 Contiguity-Multiple Parcels
<input type="checkbox"/> ER-004 Condominium-Loan Policy	<input type="checkbox"/> ER-011 Mortgage Modification	<input type="checkbox"/> ER-019.1 Contiguity-Single Parcel
<input type="checkbox"/> ER-004.1 Condominium-Owners Policy	<input type="checkbox"/> ER-012 Aggregation	<input type="checkbox"/> ER-020 First Loss
<input type="checkbox"/> ER-005 Planned Unit Development	<input type="checkbox"/> ER-013 Leasehold-Owners	<input type="checkbox"/> ER-021 Creditors Rights Affirmative
<input type="checkbox"/> ER-005.1 Planned Unit Development	<input type="checkbox"/> ER-013.1 Leasehold-Lenders	<input type="checkbox"/> ER-022 Location Endorsement
<input type="checkbox"/> ER-006 Variable Rate	<input type="checkbox"/> ER-014 Future Advance-Priority	<input type="checkbox"/> ER-022.1 Location and Map Endorsement
<input type="checkbox"/> ER-006.1 Variable Rate	<input type="checkbox"/> ER-014.1 Future Advance-Knowledge	<input type="checkbox"/> ER-100 Usury
<input type="checkbox"/> ER-006.2 Variable Rate	<input type="checkbox"/> ER-014.2 Future Advance-Letter of Credit	<input type="checkbox"/> ER-103 Balloon Endorsement
<input type="checkbox"/> ER-007 Manufactured Housing	<input type="checkbox"/> ER-014.3 Future Advance-Reverse Mortgage	<input type="checkbox"/> ER-104 Owners Policy Datedown
<input type="checkbox"/> ER-007.1 Manufactured Housing-Conversion LP	<input type="checkbox"/> ER-015 Nonimputation-Full Equity Transfer	<input type="checkbox"/> ER-105 Doing Business
<input type="checkbox"/> ER-007.2 Manufactured Housing-Conversion OP	<input type="checkbox"/> ER-015.1 Nonimputation-Additional Insured	<input type="checkbox"/> ER-106 Partnership/LLC-Permitted Transfer
<input type="checkbox"/> ER-009.1 Restrictions,Encroachments,Minerals OP	<input type="checkbox"/> ER-015.2 Nonimputation-Partial Equity	

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- 6 Within Recording Information, if multiple recording locations exist for the property's county, you will need to select one location.

Note: If you do not need recording fees and transfer tax to be included in your quote, uncheck the box labelled "Recording fees and transfer tax and skip to step 12

- 7 If needed, within Mortgage, update the number of mortgage pages if needed
- 8 If needed, within Deed, update the number of deed pages
- 9 Within Deed, the consideration amount shows the sale price by default. If needed, update the consideration amount.

The screenshot shows a web form titled "Recording information" with a checked box for "Include Recording Fees and Transfer Tax". The form is divided into sections: "Recording information", "MORTGAGE", "DEED", and "QUESTIONS".

- Recording information:** A dropdown menu for "Multiple Recording Locations exist in this county. Please pick one*" is set to "Litchfield Town". A callout "6" points to this dropdown.
- MORTGAGE:** A text input field for "Number of Mortgage Pages (1st Loan):*" contains the value "25". A callout "7" points to this field.
- DEED:** A text input field for "Number of Deed Pages*" contains the value "6". A callout "8" points to this field. Below it, a text input field for "Consideration Amount*" contains the value "\$110,000.00". A callout "9" points to this field.
- QUESTIONS:** Two checkboxes are visible: "Q5: Is the document being recorded a Mortgage Electronic Registration Systems (MERS) document?" and "Q4: Is this property a residential dwelling?".

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- 10 Within questions, check the box next to the question if your answer to the question is yes.
- 11 If needed, enter a name for the quote
- 12 Click on *Calculate* button to calculate the quote. The estimated quote will be displayed on the next page.

Note: If the button is disabled i.e. you are not able to click on the button, check to see if a mandatory field is empty. Mandatory fields are marked with a red asterisk (*).

The screenshot shows a web form with the following sections and fields:

- Recording information:** Includes a dropdown menu for "Multiple Recording Locations exist in this county. Please pick one*" with "Litchfield Town" selected. A checkbox "Include Recording Fees and Transfer Tax" is checked.
- MORTGAGE:** Includes a text input field for "Number of Mortgage Pages (1st Loan)*" with the value "25".
- DEED:** Includes a text input field for "Number of Deed Pages*" with the value "6" and a text input field for "Consideration Amount*" with the value "\$110,000.00".
- QUESTIONS:**
 - Q5: Is the document being recorded a Mortgage Electronic Registration Systems (MERS) document? (Marked with a red asterisk and a large orange "10")
 - Q4: Is this property a residential dwelling?
- Quote Name:** A text input field with the placeholder "Name your quote (optional)" (Marked with a large orange "11").
- Buttons:** "Calculate" and "Reset" buttons (Marked with a large orange "12").

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GENERATE A QUOTE – REFINANCE

If you're not on the quote form page, on the Left menu, click on Quote> Quote form to launch this page.

- 1 On the quote form page, enter the Zip Code. The city and state would be automatically populated into the respective fields.

Note: Optionally, you may also enter the borrower name, and address of the property for which quote is needed

- 2 In the Loan Type field, click on "Refinance". The policy information section will be displayed.

The screenshot displays the 'Quote form' interface. On the left is a dark sidebar with a menu containing 'Quote' (expanded), 'Quote form', 'Previous quotes', and 'Users'. The main content area is titled 'Borrower' and contains the following fields:

- Borrower Name:** Two input fields for 'First name' and 'Last name'.
- Address:** Two input fields, one of which contains 'Lakeville'.
- Zip Code*:** An input field containing '06039', highlighted with a yellow background. A red '1' is next to it.
- Loan Type:** Radio buttons for 'Refinance' (selected, with a green checkmark) and 'Purchase'. A red '2' is next to it.

Below the Borrower section is the 'Policy information' section with the following fields:

- Loan Policy*:** A dropdown menu showing 'ALTA Short Form Residential Loan Policy (LP-SFR)'.
- Loan Amount*:** An input field with the placeholder text 'Please fill in the loan amount'.

At the top right of the main content area, it says 'Welcome cqe-admin@entitleDirect.com!' and 'Sign out'.

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- 3 Within Policy Information, enter the Loan Amount.
- 4 Within Loan Policy Endorsements, some default endorsements have been selected for you. Check additional ones from the ones listed to add them to your quote or uncheck the ones you do not want to add to your quote.

Policy information

Loan Policy* ALTA Short Form Residential Loan Policy (LP-SFR) ▼

3 Loan Amount* Please fill in the loan amount

Loan policy endorsements

ER-008.1 Environmental Protection Liens ER-009 Restrictions, Encroachments, Minerals LP

<p>4</p> <p><input type="checkbox"/> ER-001 Street Assessments</p> <p><input type="checkbox"/> ER-002 Truth In Lending</p> <p><input type="checkbox"/> ER-003 Zoning</p> <p><input type="checkbox"/> ER-003.1 Zoning-Completed Structure</p> <p><input type="checkbox"/> ER-004 Condominium-Loan Policy</p> <p><input type="checkbox"/> ER-004.1 Condominium-Owners Policy</p> <p><input type="checkbox"/> ER-005 Planned Unit Development</p>	<p><input type="checkbox"/> ER-009.2 Restrictions, Encroachments, Minerals OP</p> <p><input type="checkbox"/> ER-009.3 Restrictions, Encroachments, Minerals LP</p> <p><input type="checkbox"/> ER-009.4 Restrictions, Encroachments, Minerals OP</p> <p><input type="checkbox"/> ER-009.5 Restrictions, Encroachments, Minerals OP</p> <p><input type="checkbox"/> ER-010 Assignment</p> <p><input type="checkbox"/> ER-010.1 Assignment and Date Down</p> <p><input type="checkbox"/> ER-011 Mortgage Modification</p>	<p><input type="checkbox"/> ER-016 Mezzanine Financing</p> <p><input type="checkbox"/> ER-017 Access and Entry-Direct</p> <p><input type="checkbox"/> ER-017.1 Access and Entry-Indirect</p> <p><input type="checkbox"/> ER-018 Single Tax Parcel</p> <p><input type="checkbox"/> ER-018.1 Multiple Tax Parcels</p> <p><input type="checkbox"/> ER-019 Contiguity-Multiple Parcels</p> <p><input type="checkbox"/> ER-019.1 Contiguity-Single Parcel</p>
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- 5 If discounts need to be applied, within Discounts section select the discount you wish to apply and enter the Original principal balance of the loan being refinanced.
- 6 Within Recording Information, if multiple recording locations exist for the property's county, you will need to select one location.
- 7 If needed, within Mortgage, update the number of mortgage pages if needed
- 8 If needed, enter the Original Loan Amount and the Unpaid Principal Balance

The screenshot shows a software interface with the following sections:

- Discounts** (Section 5): Contains a dropdown menu labeled "Discounts" and a text input field labeled "Original principal balance of the loan you are refinancing".
- Recording information** (Section 6): Contains a dropdown menu labeled "Multiple Recording Locations exist in this county. Please pick one*", a checked checkbox labeled "Include Recording Fees and Transfer Tax", and a **MORTGAGE** section.
- MORTGAGE** (Section 7): Contains three input fields: "Number of Mortgage Pages (1st Loan):*" with the value "25", "Original Loan Amount" with the value "\$0.00", and "Unpaid Principal Balance" with the value "\$0.00".

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- 9 Within questions, check the box next to the question if your answer to the question is yes.
- 10 If needed, enter a name for the quote
- 11 Click on *Calculate* button to calculate the quote. The estimated quote will be displayed on the next page.

Note: If the button is disabled i.e. you are not able to click on the button, check to see if a mandatory field is empty. Mandatory fields are marked with a red asterisk (*).

Number of Mortgage Pages (1st Loan):* 25

Original Loan Amount \$0.00

Unpaid Principal Balance \$0.00

QUESTIONS

9 Q5: Is the document being recorded a Mortgage Electronic Registration Systems (MERS) document?

Quote Name Name your quote (optional) 10

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