

Placing An Order In BYPASS

August 2020

1. Go to www.MeridianTitle.com
2. Click Access Your Files tab in upper right hand corner, enter your login credentials
(Orders can be placed without logging into BYPASS, select Place An Order from one of the many locations on the site)
3. Click Place Order tab
4. Select Client – This option only shows for people set up to place orders for others, such as office coordinators. If you do not order for anyone else, the Client will default to your name

The screenshot shows the 'Place Order' form. The 'YOUR COMPANY' section includes fields for Company Name, Company Phone, Contact Name, and Email Address. Below that are fields for Address, ZIP, City, and State. The 'PROPERTY ADDRESS' section includes fields for Number, Directions, Street Name, Suffix, and Units. There is also a field for Other Description (Bank Ground, Mobile Home, etc.) and a checkbox for Unincorporated. A 'City/State/County Access Info' field is also present.

5. Enter Property information. Either STREET address or a DESCRIPTION is required, as well as the State and County. When you enter the zip code, the City/State/County will auto-populate.

6. Select Transaction Type from the drop-down list. This will dictate the required information fields for your order.

7. Select Product/Service type from the drop-down list. The options will be based on your Transaction Type selection.

The screenshot shows the 'ORDER DETAILS' and 'FILE DETAILS' sections. 'ORDER DETAILS' includes fields for Transaction Type (set to Residential), Product/Service, and Client's File Number. 'FILE DETAILS' includes fields for Estimated Settlement Date, First Mortgage, and Second Mortgage.

8. On the right side of the screen, you will see fields for File Details. Enter as much information as you have available.

The screenshot shows the 'PRIMARY BUYER/BORROWER' section. It includes fields for Type (set to Individual), First Name, Middle Name, Last Name, and Suffix. There are also fields for Marital Status, Social Security #, Phone, and Email. A section for 'If married and spouse is a co-borrower, provide spouse's information' includes fields for Spouse First Name, Middle Name, Last Name, and Social Security #. There is also a checkbox for 'Same Address as Property Address' with associated address fields.

9. Enter information for Listing Agent, Selling Agent, Lender, Buyer/Borrower information (when available/applicable), and Seller information (when available/applicable). Depending on the Transaction Type you selected, either the Buyer/Borrower or the Seller information will be required.

10. Add any additional information you may have in the Notes section.

The screenshot shows the 'Notes' section with a text area for entering information. Below the text area are two buttons: 'Place Order' and 'Clear'.

11. Click Place Order button.

12. Notification will appear on screen that Order has been successfully submitted. File Details will also display to include the File Number.
13. Links are provided for allowing additional transaction activity:
 - File Summary will take you to the Summary page for the file
 - Attach a Document - transaction related documents can be uploaded directly from the site
 - Send a Note allows Partner to provide additional information or make inquiry about transaction
 - Recent Files allows Partner quick access to last 10 files added to BYPASS
 - Place Another Order - Thank YOU in advance for placing another order!