

Opening/Closing/Canceling Your Order in SoftPro Select

We all know that certain data is required to properly prepare a statement, record documents, and disburse funds. Some of the data entered is also used for management reporting, budgeting, and 1099s. Without the proper information, your order can appear on exception reports or prohibit properly closing the order.

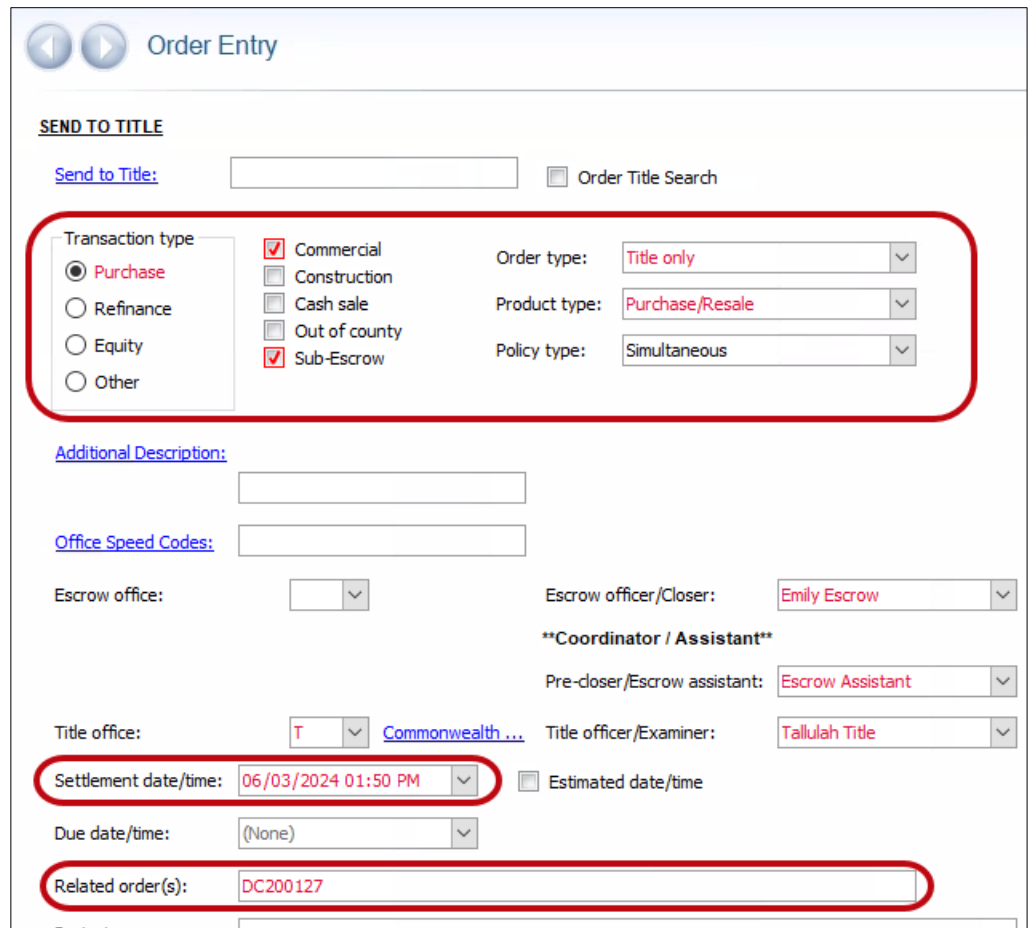
To ensure your Select order contains the necessary information the following data should be present when an order is opened, closed or canceled.

NOTE: This checklist does **not** replace your operation's Open Order job aid but is to be used to verify the following information has been entered in the order.

Verify this data is entered/selected when you are,

› Opening an order

- ☐ **Transaction type**
- ☐ Additional order type (i.e., commercial, cash sale, etc.)
- ☐ **Order type**
- ☐ **Product type**
- ☐ **Policy type**
- ☐ **Settlement date/time** (or an estimated date)
- ☐ **Related order(s)**, if applicable



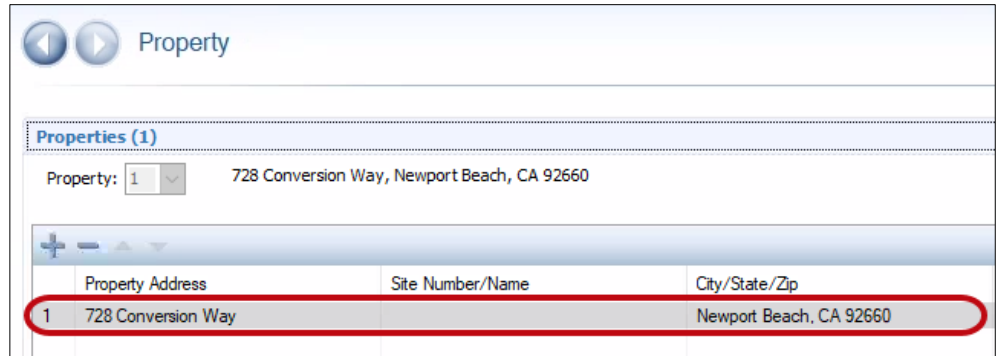
The screenshot shows the 'Order Entry' form in SoftPro Select. Red boxes highlight the following fields:

- Transaction type:** Purchase (selected), Commercial (checked), Sub-Escrow (checked).
- Order type:** Title only
- Product type:** Purchase/Resale
- Policy type:** Simultaneous
- Settlement date/time:** 06/03/2024 01:50 PM
- Related order(s):** DC200127

Other visible fields include: SEND TO TITLE, Send to Title: (text box), Order Title Search (checkbox), Additional Description: (text box), Office Speed Codes: (text box), Escrow office: (dropdown), Escrow officer/Closer: Emily Escrow, **Coordinator / Assistant**, Pre-closer/Escrow assistant: Escrow Assistant, Title office: T, Commonwealth..., Title officer/Examiner: Tallulah Title, Due date/time: (None), and Estimated date/time (checkbox).

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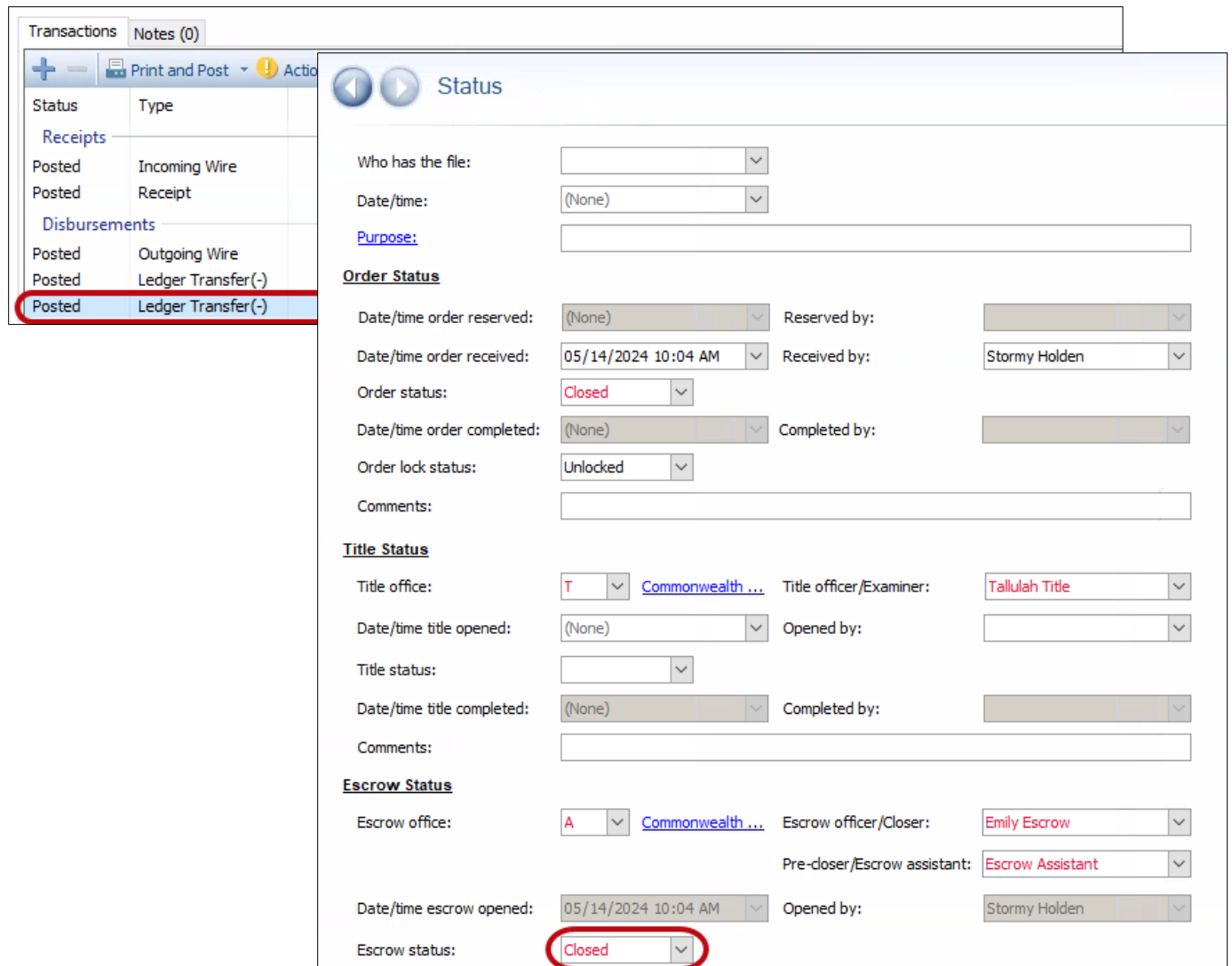
- ☐ Property address, if known



Property	Property Address	Site Number/Name	City/State/Zip
1	728 Conversion Way		Newport Beach, CA 92660

› Closing an order

- ☐ Has revenue been posted?
- ☐ **Order Status** screen: verify **Status = Closed**



Status	Type
Receipts	
Posted	Incoming Wire
Posted	Receipt
Disbursements	
Posted	Outgoing Wire
Posted	Ledger Transfer(-)
Posted	Ledger Transfer(-)

Status

Who has the file:

Date/time:

Purpose:

Order Status

Date/time order reserved: Reserved by:

Date/time order received: Received by:

Order status:

Date/time order completed: Completed by:

Order lock status:

Comments:

Title Status

Title office: [Commonwealth ...](#) Title officer/Examiner:

Date/time title opened: Opened by:

Title status:

Date/time title completed: Completed by:

Comments:

Escrow Status

Escrow office: [Commonwealth ...](#) Escrow officer/Closer:

Pre-closer/Escrow assistant:

Date/time escrow opened: Opened by:

Escrow status:

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> Cancelling a transaction

☐ Have deposited funds been returned?

- ❑ **Order Status**
screen: verify the
Status =
Canceled

HINT: Use **Ctrl + Alt + X** keyboard shortcut to quickly cancel the order and update the **Status** screen.

Status

Who has the file:

Date/time:

(None)

Purpose:

Order Status

Date/time order reserved:

(None)

Reserved by:

Date/time order received:

05/30/2024 12:24 PM

Received by:

Csa Perong

Order status:

Canceled

Date/time order completed:

(None)

Completed by:

Order lock status:

Unlocked

Comments:

Title Status

Title office:

T

[Chicago Title In...](#)

Title officer/Examiner:

Tallulah Title

Date/time title opened:

(None)

Opened by:

Title status:

Canceled

Date/time title completed:

(None)

Completed by:

Comments:

Escrow Status

Escrow office:

Escrow officer/Closer:

Emily Escrow

Date/time escrow opened:

05/30/2024 12:24 PM

Pre-closer/Escrow assistant:

Escrow Assistant

Escrow status:

Canceled

Opened by:

Csa Perong

Date/time escrow closed:

(None)

Closed by: