



CUSTOM INTEGRATIONS

SoftPro Select Scheduling Application User Guide

June 2025

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History

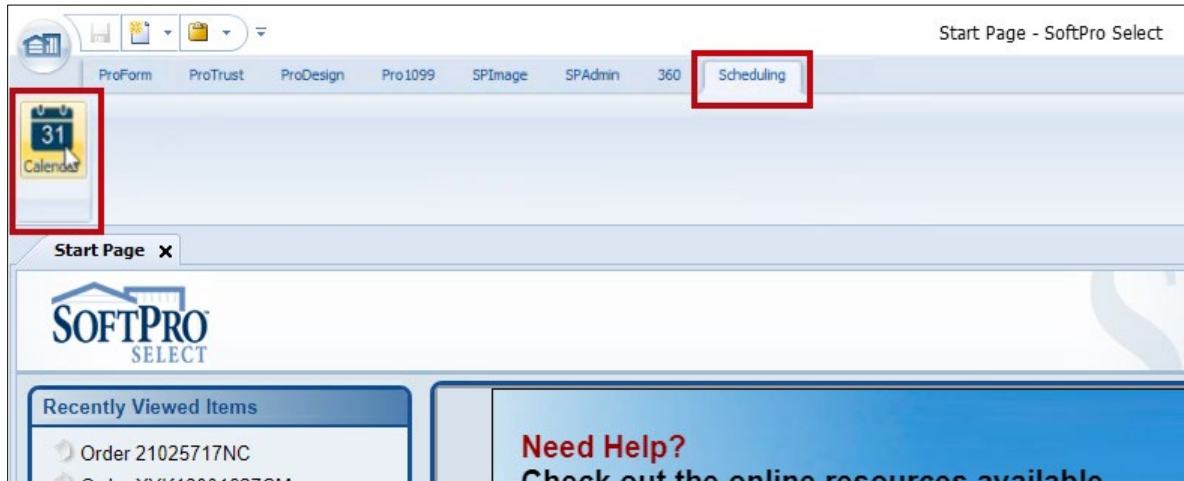
Date	Version	Document Changes
03/10/2025		Initial Release
03/17/2025		Option to send Cancellation Notification (when enabled) added to Cancellation/Deletion prompt.
05/05/2025		Enhancements added: <ul style="list-style-type: none">- Refresh Calendar view- Ability to discard an appointment without having to close the appointment modal- Filter identifier displays when filter applied- Added Escrow Assistant and Marketing/Sales Rep(s) options for email templates- Added Working Hours Only calendar view- Internal Notes added to an appointment's Quickview details
05/07/2025		Expanded language on signing into the application.
06/04/2025		Release includes: <ul style="list-style-type: none">- Work Week is now the default calendar view- Working Hours Only option disabled when Month view is selected- Appointment Date and/or Start/End Time entries are required to be entered prior to Signer being selected or ability to select Same as Escrow Officer.- Limited ability to select Same as Escrow Officer for one appointment.

Introduction

The Scheduling App provides users a centralized scheduling application with the ability to schedule, view and manage closing and signing appointments which in turn links or updates data back to SoftPro Select. Users can schedule (internal/external) signers based on their availability and capacity. Through the application, appointments can be assigned to different branch locations by attendee. Participants can receive appointment confirmation, update, and cancellation notification via email.

Accessing Scheduling App

The **Scheduling App** is a web-based application and can be opened either from the user's browser or when working in Select. There is no need to have an active order opened. The application allows for the order to be opened from the **Appointment** window.



The first time a user opens the **Scheduling App** from within SoftPro Select, the user is required to sign in and then authenticate before proceeding on to the application.

This can only be done via the Authenticator App and not the Yubi key (even if the Yubi key is set as the default form of authentication).

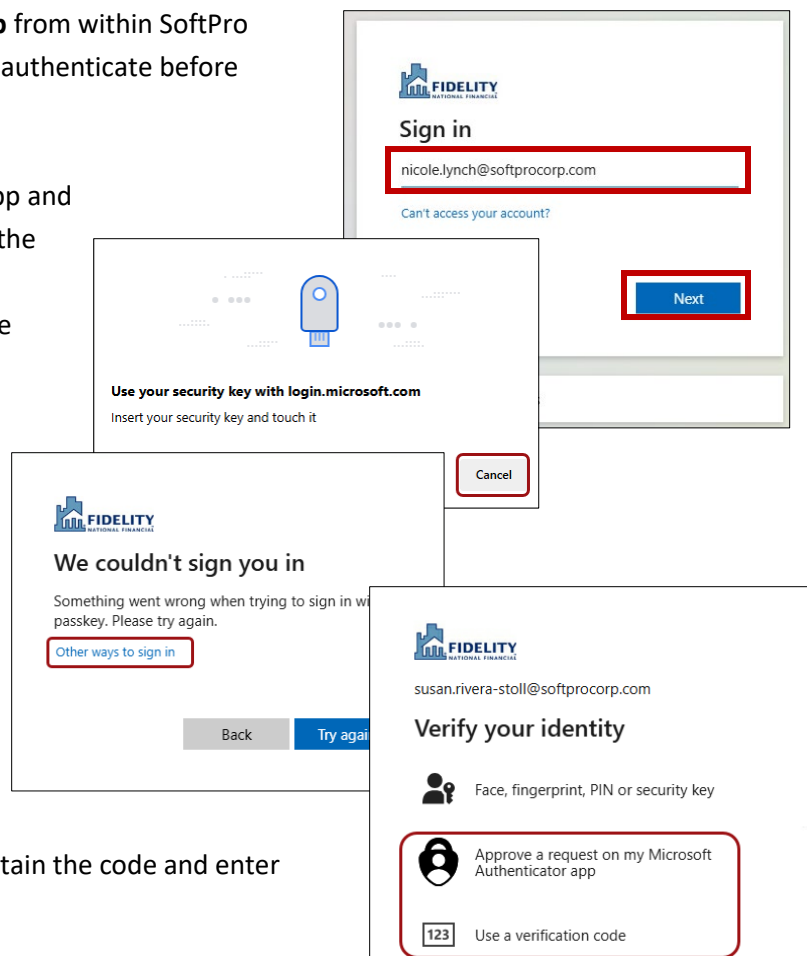
1. Click **Cancel** when prompted to use the security key
2. From the **We couldn't sign you in** dialog, click the **Other ways to sign in** link
3. Select one of the following options,

- **Approve a request on my Microsoft Authenticator app**

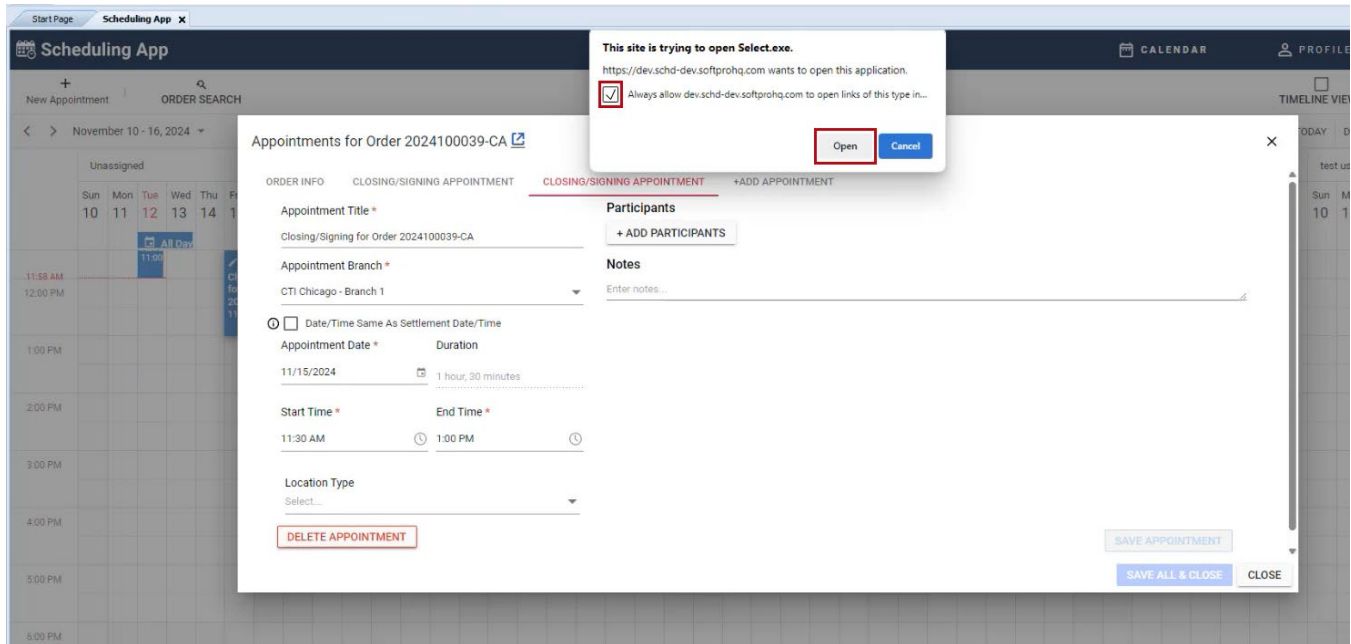
Open the Authenticator App and enter the code displayed on screen.

- **Use a verification code**

Open the Authenticator App to obtain the code and enter on screen when prompted.



Because this is a web-based application, the user is then prompted to allow / deny the site to open Select. To avoid seeing this message in the future, when prompted, check the **Always allow** check box and click the **Open** button.



The **Scheduling App** landing page provides links to,

- **Calendar** to view the calendar, set appointments, change the view (day to week, work week, etc.) or filter by Branch, Signer, location type as well as other data.

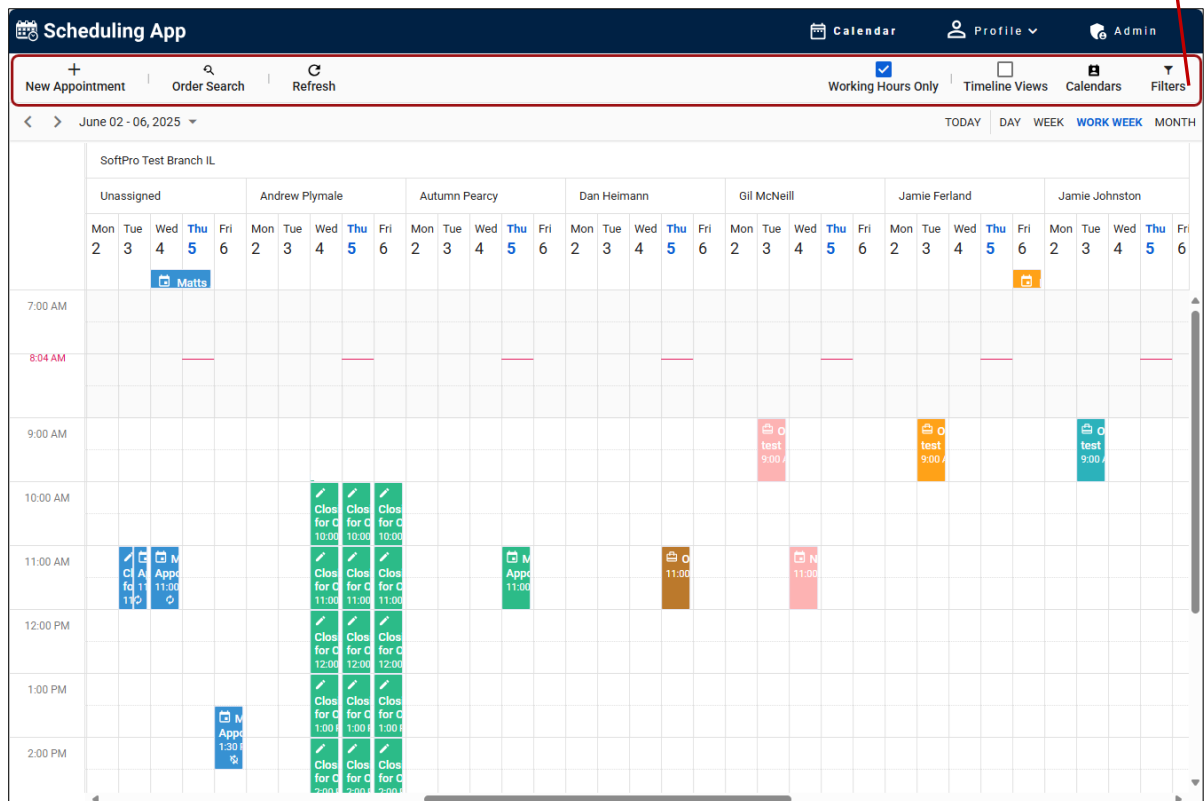
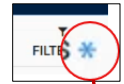
The **Calendar** is the default view with ability to view the calendar based on the time frame selected (i.e., Today, Day, Week, Work Week, Month) in the upper right.

In this view, the Branch name is displayed along with Signers that have been associated with the Branch as well as an Unassigned placeholder.

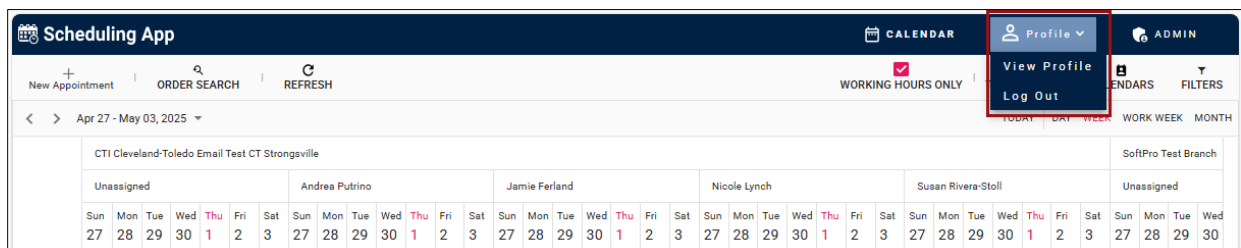
From the Calendar view, Schedulers can click the,

- **New Appointment** button to schedule appointments for
 - **Closing/Signings** for the Branch the current logged in user is associated with and the associated Signers for that Branch.
 - **Order Processing** to block time to process the order (i.e., disburse the file)
 - **Out of Office** to block time for any reason not related to an order (e.g., out for an appointment, vacations, training, etc.)
 - **Other** to block time for such things as no closings or in office group meetings, etc.
- **Order Search** button to search Select orders by order number, property address, loan details or contacts. From there appointments can be viewed, added, or edited.
- **Refresh** to manually refresh the calendar view to ensure newly added appointments are displayed.

- **Working Hours Only** check box is set by default and limits the calendar hours to 7:00am to 7:00pm (local time). Unchecking the check box displays a 24 hour day.
- **Timeline Views** check box to set the calendar views by Branch and Signers with timeline (dates and times) appearing across the top and Branch/Signers appearing on the left.
- **Calendars** button to set the Calendar View based on the branch and/or signers the current logged in user has been granted access to.
- **Filters** button to modify the Calendar View by filtering on appointment or location type, or other specific values (text, title, notes, address, etc.). When a filter is applied, the **Filter** identifier is displayed next to the label.



- **Profile** button is selected to Log Out of the application. In future enhancements, this option will provide the user with the ability to change their display name, set calendar preferences (i.e., color coding appointments, etc.), notification preferences and contact information.



- **Admin** button where Operation/Branch/System Administrators can work in,
 - **User Management** to add, edit or remove users, assign users to an Operation/Branch, and set schedule availability. This option is only available to those that are System Administrators.
 - **System Management** to add, edit or remove operations, set defaults for an operation, assign branches, and set office locations and create/ edit email notification settings. The availability of options in the System Management section is dependent upon the user's role (i.e., System, Operation, or Branch Administrator).

Scheduling App CALENDAR PROFILE **ADMIN**

USER MANAGEMENT **SYSTEM MANAGEMENT**

+ Add Edit Delete Search

First Name	Last Name	Job Title	Email Address	Office Phone Number	User Type
Abby	Billings	Support Analy...	abby.m.billings@fnf.com		Internal
Alison	Whitaker		alison.whitaker@ctt.com		Internal
Allison	Mayes	Support Analy...	allison.mayes@fnf.com		Internal

Scheduling App CALENDAR PROFILE **ADMIN**

USER MANAGEMENT **SYSTEM MANAGEMENT**

Operations/Branches

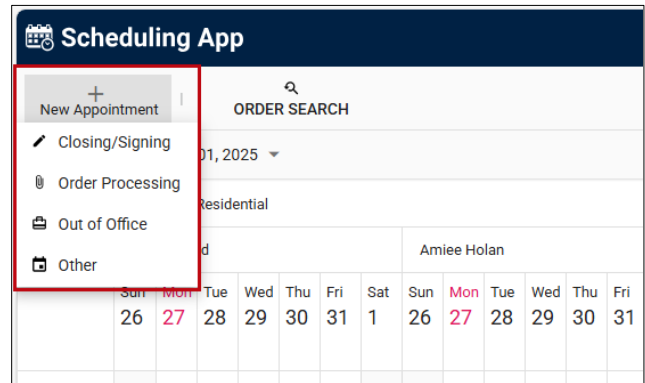
+ Add Edit Delete Update Cancel

Operation Name	Operation Code	Division	Serial Number	
▶ CT NCS Chicago	FA83	5	150151	Open
▶ CTI Chicago Metro - Ch...	FSWM	5	150151	Open
▶ CTI Chicago Metro - N...	FCDE	5	150151	Open
▶ CTI Chicago Metro - N...	FSUB	5	150151	Open
▶ CTI Chicago Metro - So...	FSWA	5	150151	Open
▶ CTI Chicago Metro - W...	FWET	5	150151	Open
▶ CTI Cleveland-Toledo	FNOX	5	207504	Open
▶ CTI NW Indiana	FCTM	5	207504	Open
▶ FNT Midwest	FILL	5	150151	Open

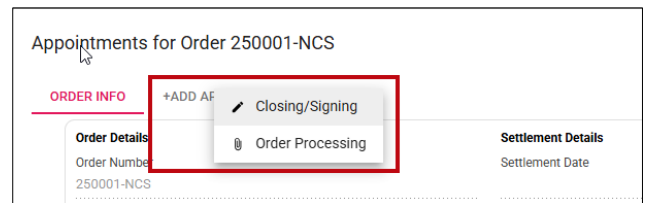
Creating New Appointments

The following options are available when creating a new appointment. Each option provides the ability to create any of the appointment types with the exception of **Order Search** which only allows the creation of appointments specific to the order (i.e., Closing/Signing or Order Processing).

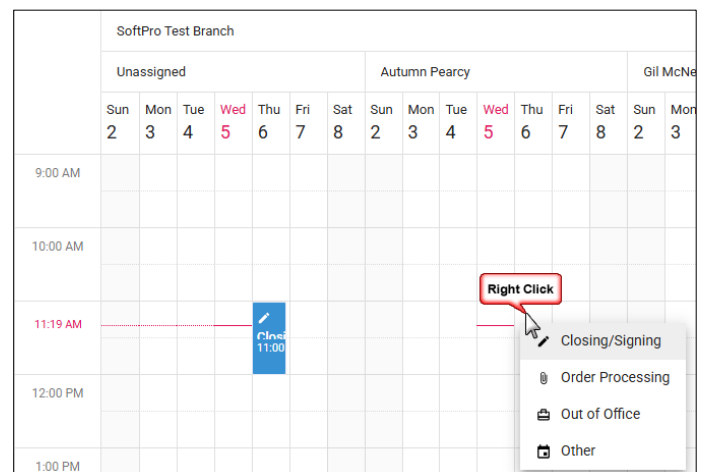
- **New Appointment** button on the toolbar allows users to schedule appointments for **Closings/Signings, Order Processing, Out of Office** or **Other**



- **Order Search > Add Appointment** – can only create appointments specific to the order: **Closing/Signing** or **Order Processing**

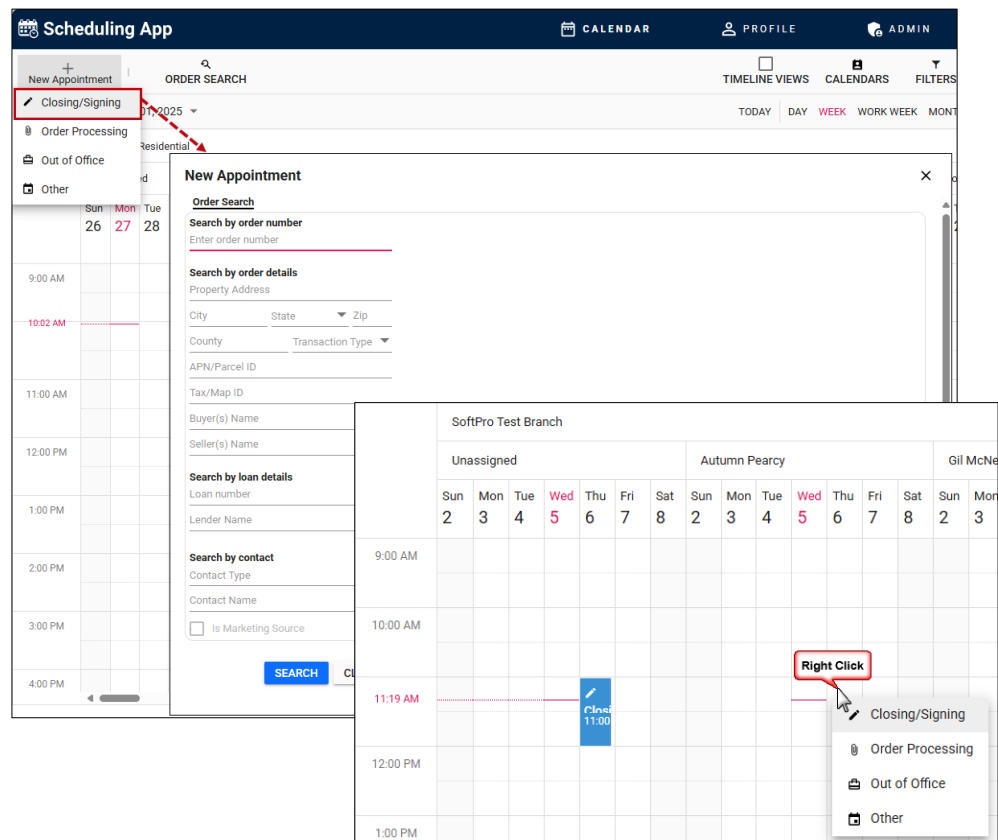


- Right-click on the date/time block while on the **Calendar** to select appointment type (same as the New Appointment menu) from the popup menu.



Scheduling a Closing/Signing

1. Click the **New Appointment** button or right-click the appointment block on the calendar
2. Select **Closing/Signing** to open the **New Appointment** window



From the **New Appointment** window, schedulers can search for the order to schedule an appointment by various means. When entering search criteria, partial information is acceptable to perform a search. However, as in any search, entering partial information provides broader search results (i.e., entering partial order number or street name versus the street number and name).

- **Order number**
- **Order Details**
 - **Property Address**
 - **APN/ Parcel ID**
 - **Tax / Map ID**
 - **Buyer(s) Name**
 - **Seller(s) Name**
- **Loan Details – Loan number or Lender Name**
- **Contact**
 - **Contact Type**
 - **Contact Name**

3. From the search results, click the **Order #** link to open a **New Appointment for Order** window

New Appointment

Search by order number
DCR24-0023-EMR

Search by order details
Property Address
City State Zip
County Transaction Type
APN/Parcel ID

Order #	Property Address	Buyer(s)	Seller(s)	Appts.
DCR24-0023-EMR	4808 Main Falls Drive, Raleigh, NC 2...		Super Duper Seller	1

1 of 1 pages (1 item)

Appointments for Order EMR01282025001STR

ORDER INFO **CLOSING/SIGNING APPOINTMENT** +ADD APPOINTMENT

Appointment Title *
Closing/Signing for Order EMR01282025001STR

Appointment Branch *
SoftPro Test Branch

☒ **Date/Time Same As Settlement Date/Time**

Appointment Date * **Duration**
2/14/2025 1 hour, 0 minutes

Start Time * **End Time ***
12:00 AM 1:00 AM

Timezone *
Eastern Standard Time

Location Type

Participants
+ ADD SIGNER
+ ADD ORDER CONTACT

Internal Notes
Enter notes...

External Email Notification Message
Enter text to appear on notification email

SAVE ALL & CLOSE CLOSE

Once the **New Appointment** window opens,

4. Complete the required information as indicated by the red asterisk
- Appointment Title** – populates with **Closing/Signing for Order [current order number]**; this may be overwritten or appended to as needed
 - Appointment Branch** – this populates the **A-Settlement Agent** Contact entered in the Select Order and can be manually overwritten if needed.

NOTE: Once the Branch is populated, the appointment displays the **Date/Time Same As Settlement Date/Time** check box depending on the default setting for the Branch set by the Administrator. This indicates whether the date/time is overwritten in the Select order (if the option is set for the Branch).

If/when multiple appointments are scheduled, only one appointment can have this check box checked. The date/time set on that appointment is then synchronized with the Select Order.

- Appointment Date** – populates from the Order **Settlement Date/Time** field if the above option is checked, otherwise it is blank.
- Start Time / End Time** – populates from the Order **Settlement Date/Time** field if the above option is checked, otherwise it is blank. The **End Time** defaults to one hour from the **Start Time**; both fields may be manually overwritten as needed.

NOTE: The **Appointment Date** and **Start Time / End Time** are required fields, and the **Signer** cannot be identified as **Same as Escrow Officer** (if populated from the Select Order) or selected if none exists in the Select Order until the fields are populated.

- e. **Timezone** – populates based on the location of the current logged in user; this may be changed
5. Complete the remaining information as needed

a. **Location Type** – select from the available options

- **Onsite (Appointment Branch)** – once selected, the Appointment Branch entry is populated with the Branch name and address.
- **Office (Remote Location)** – if configured, once selected the user has the option of selecting the offsite location from the drop-down or selecting the Offsite-Other entry to allow for the manual entry of the name, address, and phone number.
- **Online (RON, RIN)** – no additional location information is needed
- **Mail Away (BancServ)** – no additional location information is needed

b. **Participants**

- **Signer** – is not enabled until the **Appointment Branch** (this populates with the **A-Settlement Agent** Contact from the Select Order) is selected and populates by default the Escrow Officer entered in the Select Order but may also be left blank and would show for the Branch under the **Unassigned** user.

NOTE: As noted above, if the **Appointment Date** and/or **Start/End Time** are not entered, the **Signer** cannot be identified as **Same as Escrow Officer** (if populated from the Select Order) and the **Signer** button is disabled. A **Conflict** message displays identifying what is needed to continue.

New Appointment for Order 2025030002

Order Info **Closing/Signing Appointment** +Add Appointment

Appointment Title *
Closing/Signing for Order 2025030002

Appointment Branch *
SoftPro Test Branch IL

☐ Date/Time Same As Settlement Date/Time

Appointment Date * Duration
6/5/2025 (Unknown)

Start Time * End Time *
hour:minute PM 2:00 PM

Start Time is required.

Timezone *
Eastern Standard TI...

Participants

Susan Rivera-Stoll ☐ Same as Escrow Officer ☐ Receive Notifications Remove

Conflict: Invalid Start or End Date

+ Add Signer

+ Add Order Contact

Internal Notes
Enter notes...

External Email Notification Message
Enter text to appear on notification email

Save All & Close Close

Clicking the **Add Signers** button opens the **Manage Participant** window displaying the signers associated with the selected Branch.

The screenshot shows the 'Manage Participants' window with a close button (X) in the top right. Below the title bar, there is a 'Viewing' dropdown menu set to 'Only Signers'. To the right of this menu are two checkboxes: 'Show Escrow Officers Only' and 'Show Users With Scheduling Conflict', both of which are currently unchecked. Further right is a 'Search Users' input field with a magnifying glass icon. Below these controls is a table with five columns: 'Add', 'Set Escrow Officer', 'Name', 'Available', and 'Conflict Reason'. The table contains six rows of data. The first three rows have 'Add' checkboxes that are unchecked. The last two rows have 'Add' checkboxes that are checked. The 'Set Escrow Officer' column has checkboxes for the last two rows, which are also checked. The 'Name' column lists the signers: Autumn Percy (External), Farzeen Chaudhry, Gil McNeill, Jon Gibson, Matt Robidoux, and Nicole Lynch. The 'Available' column shows 'Yes' for all signers. The 'Conflict Reason' column shows 'N/A' for all signers. At the bottom right of the window are two buttons: 'UPDATE PARTICIPANTS' and 'CANCEL'.

Add	Set Escrow Officer	Name	Available	Conflict Reason
<input type="checkbox"/>		Autumn Percy (External)	Yes	N/A
<input type="checkbox"/>		Farzeen Chaudhry	Yes	N/A
<input type="checkbox"/>		Gil McNeill	Yes	N/A
<input type="checkbox"/>		Jon Gibson	Yes	N/A
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Matt Robidoux	Yes	N/A
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Nicole Lynch	Yes	N/A

The default view shows **Only Signers** (internal and external) but can be changed to **Only Internal Signers** or **Only External Signers** from the **Viewing** drop-down.

This screenshot shows the 'Manage Participants' window with the 'Viewing' dropdown menu open. The dropdown menu has three options: 'Only Signers' (which is highlighted with a red box), 'Only Internal Signers', and 'Only External Signers'. The table below the dropdown shows the first two rows of data: Autumn Percy (External) and Farzeen Chaudhry. The 'Add' checkboxes for these two rows are unchecked. The 'Set Escrow Officer' column has checkboxes for these two rows, which are also unchecked. The 'Available' column shows 'Yes' for both signers. The 'Conflict Reason' column shows 'N/A' for both signers.

Add	Set Escrow Officer	Name	Available	Conflict Reason
<input type="checkbox"/>		Autumn Percy (External)	Yes	N/A
<input type="checkbox"/>		Farzeen Chaudhry	Yes	N/A

Check the applicable check box if only Escrow Officers should be shown or if Users with Schedule Conflicts should be displayed.

If a user has a scheduling conflict, the **Conflict Reason** is populated. Users may have a scheduling conflict but may still be scheduled for multiple appointments.

Manage Participants
×

Viewing
Only Signers

☐ Show Escrow Officers Only
☒ Show Users With Scheduling Conflict

Search Users

Add	Set Escrow Officer	Name	Available	Conflict Reason
<input type="checkbox"/>		Autumn Percy (External)	Yes	N/A
<input type="checkbox"/>		Farzeen Chaudhry	Yes	N/A
<input type="checkbox"/>		Gil McNeill	Yes	N/A
<input type="checkbox"/>	<input type="checkbox"/>	Jamie Ferland	No	Already Booked
<input type="checkbox"/>		Jon Gibson	Yes	N/A
<input type="checkbox"/>	<input type="checkbox"/>	Matt Robidoux	Yes	N/A
<input type="checkbox"/>	<input type="checkbox"/>	Nicole Lynch	Yes	N/A

UPDATE PARTICIPANTS
CANCEL

Check the **Add** check box for the **Signer** and **Set Escrow Officer** if applicable. The Set as Escrow Office can only be set for one appointment at a time. When set, it is then disabled for all additional appointments; unchecking it enables it.

NOTE: If the Escrow Officer is set here, the selection is written back to the Select Order.

- **Order Contacts** – click the **Add Contacts** button to select the contacts involved in the appointment and to set notifications to be sent. This also allows the user to view the contact information entered/missing from the Select Order.

Manage Order Contacts as Appointment Participants
×

Name	Type	Code/Title	Phone Number	Email
<input checked="" type="checkbox"/> Amanda C Supple				
<input checked="" type="checkbox"/> Amanda Supple	Buyer/Borrower	B		
<input type="checkbox"/> BB&T				
<input type="checkbox"/> BB&T	Lender	L		
<input type="checkbox"/> Simplifile				
<input type="checkbox"/> Simplifile	Other Contact	O2		
<input checked="" type="checkbox"/> Nathan D Supple				
<input checked="" type="checkbox"/> Nathan Supple	Seller	S		
<input type="checkbox"/> First Title of Louisiana, LLC				
<input type="checkbox"/> First Title of Louisiana, LLC	Settlement Agent	A	888-497-9904	FNFTSCommercial@fnf.com

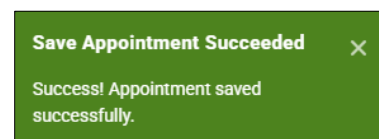
UPDATE PARTICIPANTS
CANCEL

- c. **Internal Notes** – enter as needed; when entered, the notes are included in the **Appointment Detail** which is written back to the Order Notes in Select. Additionally, up to three lines of the Internal Notes are displayed on the Quickview summary window.
 - d. **External Email Notification Message** – If appointment email notifications are enabled for the Branch, notes entered here are included in the email notification sent to the selected Participants.
6. Click the **Save Appointment** button if you wish to save the information but keep the appointment window open or **Save All & Close** button to save and close the appointment window.

You can set multiple appointments at one time and use the **Save All & Close** button to save everything at once.

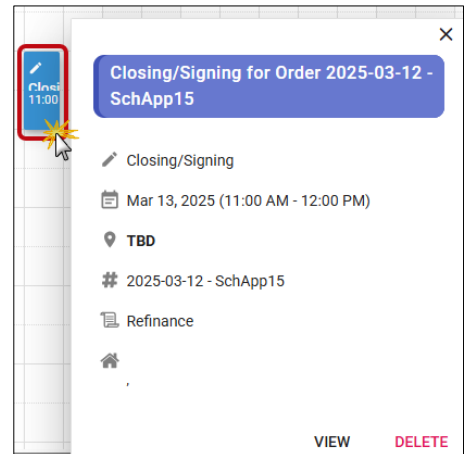
Prior to saving an appointment, the **Discard Appointment** button is enabled, allowing users to discard only the current appointment. This can be especially useful if you've entered multiple appointments before saving all as the Appointment window remains open and moves you to the prior tab.

A message displays once the appointment has successfully been saved.



If the **Close** button is clicked, users are prompted to remain on the screen and continue editing, save and close the appointment or discard the information and close the appointment.

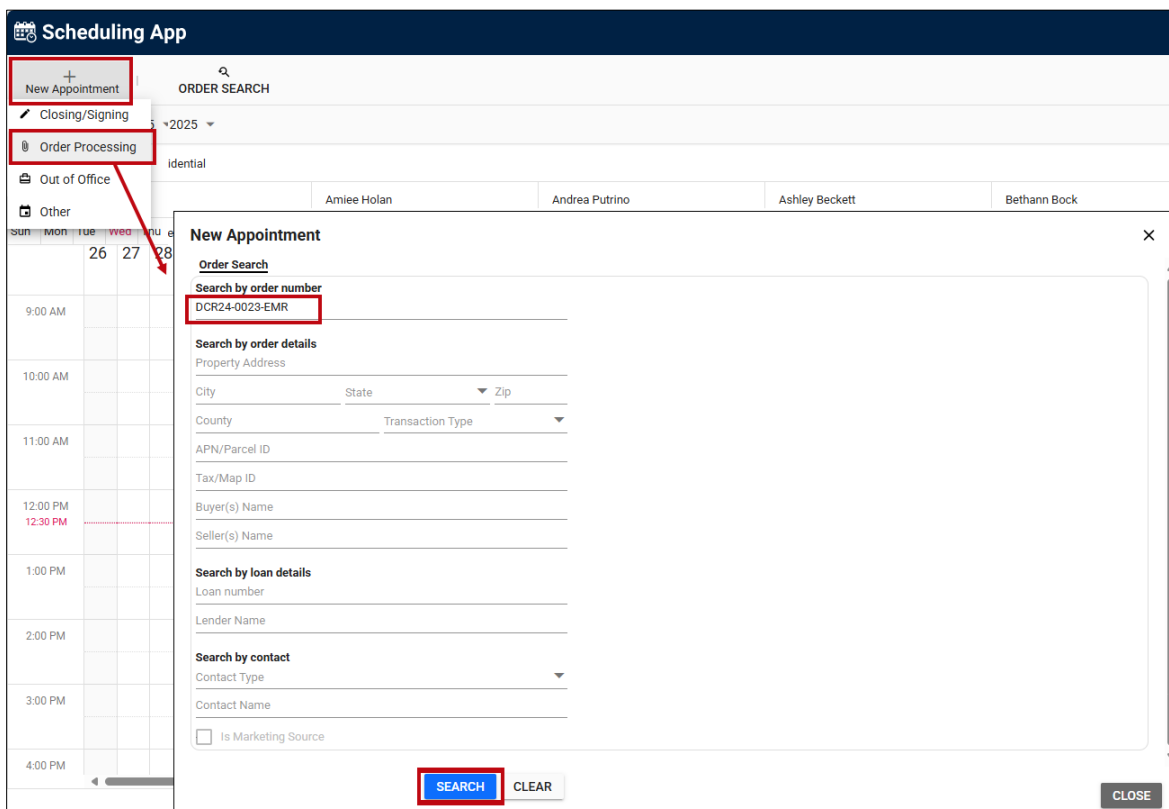
The appointment displays on the Calendar view for the Branch and Participant selected in the appointment or **Unassigned** if none selected.



Scheduling Order Processing

Setting an **Order Processing** appointment requires an order to be associated to populate information. When **Order Processing** is selected as the appointment type, the **New Appointment** window opens to display Order Search fields.

1. Enter search information (i.e., order number, property address, etc.)
Remember, partial information can be entered to perform a search, or multiple entries may be entered.
2. Click the **Search** button



- From the search results, click the **Order #** link to open a **New Appointment for Order** window

New Appointment

Search by order number
DCR24-0023-EMR

Search by order details
Property Address
City State Zip
County Transaction Type
APN/Parcel ID

Order #	Property Address	Buyer(s)	Seller(s)	Appts.
DCR24-0023-EMR	4808 Main Falls Drive, Raleigh, NC 2...		Super Duper Seller	1

1 of 1 pages (1 item)

When the window opens, the **Appointment Title** automatically populates with **Order Processing for Order [order number]**. This can be overwritten or appended with additional information as needed.

- Complete the remaining fields; making sure all required information is entered

The time frame for Order Processing appointments cannot cover multiple days and therefore there is only an **Appointment Date** field. It does, however, display the **Duration** based on the **Start Time / End Time** selected.

- Click the **Save Appointment** button if you wish to keep the appointment open or the **Save All & Close** button to save and close the appointment.

New Appointment for Order DCR24-0023-EMR

ORDER INF **ORDER PROCESSING APPOINTMENT** +ADD APPOINTMENT

Appointment Title *
Order Processing for Order DCR24-0023-EMR

Appointment Branch *
CT Akron Residential

Appointment Date * Duration
1/29/2025 1 hour, 0 minutes

Start Time * End Time *
2:00 PM 3:00 PM

Location Type
Select...

Participants
Amiee Holan Remove

+ ADD PARTICIPANT

Notes
Enter notes...

DELETE APPOINTMENT

SAVE APPOINTMENT

SAVE ALL & CLOSE CLOSE

The appointment displays on the Calendar view for the Branch and Signer selected in the appointment or **Unassigned** if none selected.

Workup Time for Order DCR24-0015KSM6

Order Processing

Jan 23, 2025 (3:30 PM - 4:00 PM)

Onsite (Appointment Branch)
1459 S Lake Park Ave., Hobart, IN 46342

DCR24-0015KSM6

Purchase

222 Pork Belly Ln
Cedar Lake, IN 46303

VIEW DELETE

Scheduling Out of Office

Scheduling **Out of Office** appointments allows time to be blocked off on the Calendar prohibiting appointments from being set during the time and flagging Participant with a Conflict.

1. From the **New Appointment** menu, select **Out of Office** to open a **New Appointment** window
2. Enter the information in the required fields (identified with a red asterisk)
3. The **Start Time / End Time** can be selected to block specific times or check the **All day** check box to block the entire day

Checking the **Recurring** check box displays corresponding fields for frequency (**Repeat** and **Repeat every**) along with an **End** field.

4. Click the **Add Participant** button to select from available users
5. Enter **Notes** as needed
6. Click the **Save** button to remain on the screen; click **Save & Close** to save and close the window

If **All Day** is checked on the appointment, the appointment is shown at the top of Calendar otherwise, it is shown for the **Start Time/End Time** entered.

The appointment is shown on the Calendar for the Participant selected in the appointment across all Branches they are associated with. Deleting the appointment removes it from the Branches the user is assigned to.

Scheduling Other

Scheduling **Other** appointments allows time to be blocked off on the Calendar prohibiting appointments from being set during the time and flagging Participants with a Conflict.

1. From the **New Appointment** menu, select **Other** to open a **New Appointment** window
2. Enter the information in the required fields (identified with a red asterisk)
3. The **Start Time / End Time** can be selected to block specific times or check the **All day** check box to block the entire day
4. **Timezone** defaults to the current logged in user but may be changed as needed.

Checking the **Recurring** check box displays corresponding fields for frequency (**Repeat** and **Repeat every**) along with an **End** field.

5. Select the **Location** as needed
6. Click the **Add Participant** button to select from available users
7. Enter **Notes** as needed
8. Click the **Save** button to remain on the screen; click **Save & Close** to save and close the window

The screenshot displays the 'Scheduling App' interface. On the left, a calendar grid shows dates 26, 27, and 28. A dropdown menu is open, with 'New Appointment' and 'Other' highlighted by red boxes. An arrow points from the 'Other' option to the 'New Appointment' window. The window contains the following fields and controls:

- Appointment Title ***: A text field with 'Training' entered, marked with a red asterisk.
- Start Date ***: A date picker showing '3/24/2025', marked with a red asterisk.
- End Date ***: A date picker showing '3/28/2025', marked with a red asterisk.
- Start Time ***: A time picker showing '1:30 PM', marked with a red asterisk.
- End Time ***: A time picker showing '4:00 PM', marked with a red asterisk.
- Timezone ***: A dropdown menu showing 'Eastern Standard Time', marked with a red asterisk.
- Recurring**: A checked checkbox, highlighted by a red box.
- Repeat**: A dropdown menu showing 'Daily', highlighted by a red box.
- Repeat every**: A numeric input field showing '1', highlighted by a red box.
- End**: A dropdown menu showing 'Never', highlighted by a red box.
- Participants ***: A section with a list of participants, including 'Jamie Ferland' with a 'Remove' button, and an '+ ADD PARTICIPANT' button.
- Notes**: A text area with the placeholder 'Enter notes...'.
- Buttons**: At the bottom right, there are three buttons: 'SAVE & CLOSE', 'SAVE', and 'CLOSE', with 'SAVE & CLOSE' highlighted by a red box.

Searching for an Order

The **Order Search** screen provides the ability to search by entering information in one or multiple of the following available fields. Partial information may be entered but as in any search, it may provide more results than desired.

- (Select) **Order number**
 - **Order details**
 - **Property address**
 - **City**
 - **State**
 - **Zip**
 - **County**
 - **Transaction Type – Purchase, Refinance, or Equity**
 - **APN/Parcel ID**
 - **Tax/Map ID**
 - **Buyer(s) Name**
 - **Seller(s) Name**
 - **Loan details – Loan number and/or Lender name**
 - **Contact – Contact Type and/or Contact Name**
- The **Is Marketing Source** check box is enabled once a **Contact Type** is selected or **Contact Name** entered.

Once the desired search data is entered, click the **Search** button to perform the search. Clicking the **Clear** button clears all search fields.

Order Search

Search by order number
Enter order number

Search by order details
Property Address

City
State
Zip

County
Transaction Type

APN/Parcel ID
Tax/Map ID
Buyer(s) Name
Seller(s) Name

Search by loan details
Loan number
Lender Name

Search by contact
Listing Agent
Contact Name

☒ Is Marketing Source

SEARCH

CLEAR

The search results display the **Order # Property Address, Buyer(s), Seller(s)** and the number of **Appts.** scheduled.

Order Search

Search by order number
25

Search by order details
Property Address
City State Zip
County Transaction Type
APN/Parcel ID
Tax/Map ID
Buyer(s) Name
Seller(s) Name

Search by loan details
Loan number
Lender Name

Search by contact
Contact Type
Contact Name
☐ Is Marketing Source

Order #	Property Address	Buyer(s)	Seller(s)	Appts.
2025030039-FNF	123 Test Ave.			0
2025030039-4x-F...				1
2025030040-FNF				1
2025030040-4x-F...				1
250001-NCS	123 Main Street, Seattle, ...	TBD and TBD	TBD	0
250002-NCS	123 Main Street, Seattle, ...	Bonnie Buyer and Ben Bu...	3 Sisters LLC	0
250003-NCS	123 Main Street, Seattle, ...	Bonnie Buyer and Ben Bu...	3 Sisters LLC	0
250004-csKS	3002 Colby Ave, Everett, ...	TBD and TBD	TBD	0
250004-NCS	1200 N Lincoln St, SV Def...	Bart Buyerman and Lisa B...	Abston Henricksen Land ...	0
250005-NCS	1200 N Lincoln St, SV Def...	Bart Buyerman and Lisa B...	Abston Henricksen Land ...	0

1 of 9 pages (87 items)

SEARCH **CLEAR** **CLOSE**

Clicking the **Order #** link opens the **Appointments** window for that order. From the **Appointments** window, users can view order information, view or edit existing appointment(s) or schedule a new appointment.

If no appointment is scheduled, the **Order Info** tab is displayed. Information on this screen is read only and populates the available information from the Select order.

Appointments for Order 250001-NCS

ORDER INFO +ADD APPOINTMENT

Order Details
Order Number
250001-NCS
Transaction Type
Purchase (with Loan)
Order Status
InProcess
Project Name

Marketing Source
Contact Type
Contact Name
Marketing Rep(s)

Settlement Details
Settlement Date
Settlement Time
☐ Estimated Date/Time
Settlement Agent Name
Escrow Officer

Loan Details
Loan Number
Lender Name

Property Details
Property #1
123 Main Street
City
Seattle
State
WA
Zip
98101
County
King
APN/Parcel ID
Tax/Map ID
Property #2
456 Main Street
Property #3
789 Main Street
[View less](#)
[View more](#)
[View more](#)

SAVE ALL & CLOSE **CLOSE**

Users can schedule an appointment by clicking the **+Add Appointment** link and selecting the type of appointment you wish to create: **Closing/Signing** or **Order Processing**.

Appointments for Order 250001-NCS

ORDER INFO +ADD APPOINTMENT

Order Details
Order Number
250001-NCS

Settlement Details
Settlement Date

+ADD APPOINTMENT
Closing/Signing
Order Processing

Refer to the corresponding information in the [New Appointment section](#) depending upon the type of appointment you wish to schedule.

If an appointment has already been scheduled, the window opens to the scheduled appointment; this may be a **Closing/Signing Appointment** or an **Order Processing Appointment**. The appointment can be edited, deleted, or additional appointments added by clicking the **+Add Appointment** link. The **Order Info** tab can still be accessed by clicking the **Order Info** link.

If multiple appointments have been scheduled, the **Appointments** window opens to the first scheduled appointment. To view the additional appointment(s), click the next **Closing/Signing Appointment** link.

The image displays three overlapping screenshots of the 'Appointments for Order' window, illustrating different appointment types and their details.

Top Window: Appointments for Order DCR25-0001

- ORDER INFO:** CLOSING/SIGNING APPOINTMENT (highlighted in red).
- Appointment Title:** Closing/Signing for Order DCR25-0001
- Appointment Branch:** (empty)
- Participants:** Jennifer Hein. Options: ☐ Same as Escrow Officer, ☐ Receive Notifications, [Remove](#).
- + ADD SIGNER** button.

Middle Window: Appointments for Order DCR24-0023-EMR

- ORDER INFO:** ORDER PROCESSING APPOINTMENT (highlighted in red).
- Appointment Title:** Order Processing for Order DCR24-0023-EMR
- Appointment Branch:** CT Akron Residential
- Participants:** Michelle Hampton. Options: ☐ Same as Escrow Officer, ☐ Receive Notifications, [Remove](#).
- + ADD PARTICIPANT** button.

Bottom Window: Appointments for Order DCR25-0003-JJF

- ORDER INFO:** CLOSING/SIGNING APPOINTMENT (highlighted in red).
- Appointment Title:** Closing/Signing for Order DCR25-0003-JJF
- Appointment Branch:** SoftPro Test Branch
- Participants:**
 - Nicole Lynch: ☐ Same as Escrow Officer, ☒ Receive Notifications, [Remove](#)
 - B - Jamie Lee (link)
 - Jamie Lee: Buyer/Borrower, ☒ Receive Notifications, [Remove](#)
- + ADD SIGNER** button.
- + ADD ORDER CONTACT** button.
- Internal Notes:** Enter notes...
- External Email Notification Message:** this is a mail away signing
- Appointment Date:** 2/28/2025
- Duration:** 1 hour, 0 minutes
- Start Time:** 1:30 PM
- End Time:** 2:30 PM
- Timezone:** Eastern Standard Time
- Buttons:** [SAVE ALL & CLOSE](#), [CLOSE](#)

The **Order Search** screen closes once an order is selected. Click the **Order Search** button to perform another search.

Editing Appointments

When it is necessary to edit (or view) an existing appointment, there are multiple ways to open the appointment.

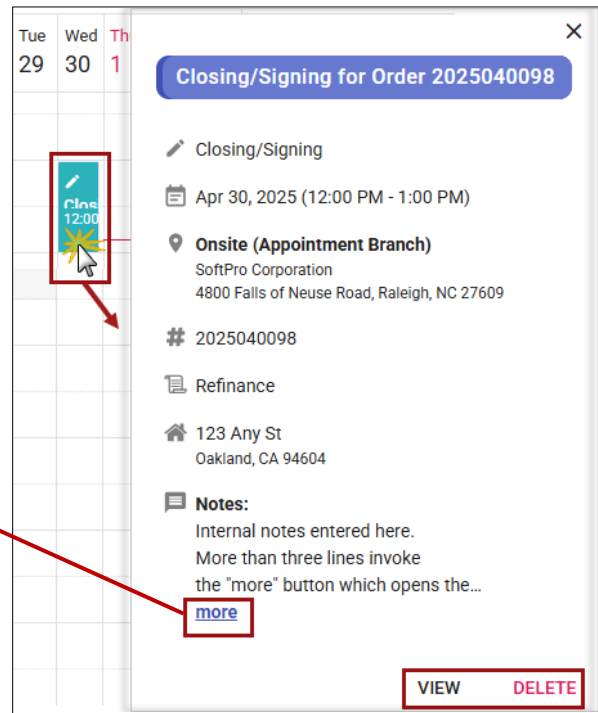
- Access via the **Order Search** as noted in the [Searching for an Order](#) section

- Click on the entry in the **Calendar** view to open the Quickview window.

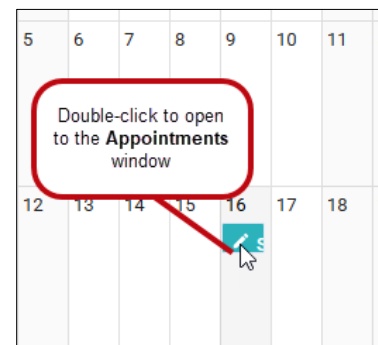
From the Quickview window you can,


- Click the **View** link to open the **Appointments** window.
- Click the **Delete** link to delete the appointment without opening the **Appointments** window.

NOTE: When **Internal Notes** are entered for the appointment, up to three lines are displayed here. If more than three lines exist, clicking the **more** link also opens the **Appointments** window.



- Double-click the entry from the **Calendar** view to directly open the **Appointments** window



The **Appointments** window opens the tab for the scheduled appointment. All of the fields displayed can be edited, and the appointment can be deleted from this window as well. Users can add or remove **Signers**, **Order Contacts**, view **Participant** contact information by clicking the corresponding **Contact Card**  icon, select **Participants** to receive notifications or enter **Notes** for the appointment.

If multiple appointments exist, they can also be viewed or edited simply by clicking the **Closing/Signing Appointment** link or schedule a new appointment by clicking the **+Add Appointment** link.

Appointments for Order 240003GA

ORDER INFO CLOSING/SIGNING APPOINTMENT CLOSING/SIGNING APPOINTMENT CLOSING/SIGNING APPOINTMENT CLOSING/SIGNING APPOINTMENT +ADD APPOINTMENT

Appointment Title *
Seller Signing for Order 240003GA

Appointment Branch *
CT Akron Residential

Appointment Date *
1/16/2025

Duration
1 hour, 0 minutes


Start Time *
1:00 PM

End Time *
2:00 PM


Location Type
Onsite (Appointment Branch)

CT Akron Residential
3560 West Market Street, Ste. 105
Fairlawn, OH 44333

Participants

Andrea Putrino  ☐ Receive Notifications [Remove](#)

+ ADD SIGNER

123 Seller, LLC Seller  ☐ Receive Notifications [Remove](#)

+ ADD ORDER CONTACT

Notes
Enter notes...

DELETE APPOINTMENT

SAVE APPOINTMENT

SAVE ALL & CLOSE CLOSE

If a change is made to the current appointment, the **Save Appointment** button is enabled and when clicked, saves information edited on the current tab and keeps the **Appointments** window open. Clicking the **Save All & Close** button saves any changes made on the current or other appointments and closes the **Appointments** window.

Appointments for Order 240006-NCS

ORDER INFO CLOSING/SIGNING APPOINTMENT CLOSING/SIGNING APPOINTMENT **CLOSING/SIGNING APPOINTMENT** CLOSING/SIGNING APPOINTMENT +ADD APPOINTMENT

Appointment Title *
Closing/Signing for Order 240006-NCS

Appointment Branch *
Castle Services

☐ Date/Time Same As Settlement Date/Time

Appointment Date *
12/11/2024


Duration
0 hour, 30 minutes

Start Time *
4:30 PM

End Time *
5:00 PM

Location Type
Select...

Participants

Nicole Lynch ☐ Same as Escrow Officer  ☒ Receive Notifications [Remove](#)

+ ADD SIGNER

+ ADD ORDER CONTACT

Notes
Enter notes...

DELETE APPOINTMENT

SAVE APPOINTMENT

SAVE ALL & CLOSE CLOSE

When the Branch enables the **SPS Order Overwrite Permissions**, a Warning message displays prompting the user to confirm they wish to update the Settlement Date and/or Time in the Order. Clicking **Yes**, synchronizes the information to the Select Order. Clicking **No, Go Back** returns the user to the **Appointments** window without saving the edits.

Warning! Saving the appointment in its current state will update the Settlement Date and/or Time in the Order.

Are you sure you wish to proceed?

YES NO, GO BACK

When setting an appointment, the appointment's date and start time sync to the Order's settlement date and time. Changes made to the appointment's date and start time override the Order's **Settlement Date/Time** field. If set by the Administrator, Scheduling Defaults may overwrite the **Settlement Date/Time** field in the Select Order when the check box is checked. Only one appointment can have this check box checked and may be changed.

SoftPro Test Branch

☒ Date/Time Same As Settlement Date/Time

Appointment Date * 4/18/2025

Duration 1 hour, 0 minutes

Start Time * 9:30 AM

End Time * 10:30 AM

Deleting/Canceling an Appointment

As noted previously, canceling/deleting an appointment can be done from the,

- Summary view to access the **Delete** link without opening the **Appointments** window
- **Appointment** tab to access the **Delete Appointment** button

Appointments for Order DCR25-0056

ORDER INFO CLOSING/SIGNING APPOINTMENT +ADD APPOINTMENT

Appointment Title * Closing/Signing for Order DCR25-0056

Appointment Branch * SoftPro Test Branch

☒ Date/Time Same As Settlement Date/Time

Appointment Date * 4/18/2025

Duration 1 hour, 0 minutes

Start Time * 9:30 AM

End Time * 10:30 AM

Timezone * Eastern Standard Time

Location Type Onsite (Appointment Branch)

SoftPro Corporation
4800 Falls of Neuse Road
Raleigh, NC 27609
(919) 829-1122

Participants

Jamie Ferland ☒ Same as Esc

+ ADD SIGNER

B - Jamie IndivB1 and Jamie IndivB2

Jamie IndivB1 Buyer/Borrower

L - ARVEST BANK

ARVEST BANK Lender

S - Matt Robidoux

Matt Robidoux Seller

+ ADD ORDER CONTACT

Internal Notes

uat smoke test - update

External Email Notification Message

uat smoke test

DELETE APPOINTMENT

VIEW DELETE

SAVE APPOINTMENT

SAVE ALL & CLOSE CLOSE

When the **Delete** button is clicked, the **Confirm Delete Appointment** message is displayed.

Users can opt to send a notification (if this notification type is enabled) to the Participants by checking the **Send Cancellation Notification** check box .

Confirm Delete Appointment

Are you sure you want to delete this Closing/Signing appointment for Order 2025030040-UAT?
This action cannot be undone.

NO, GO BACK YES, DELETE APPOINTMENT

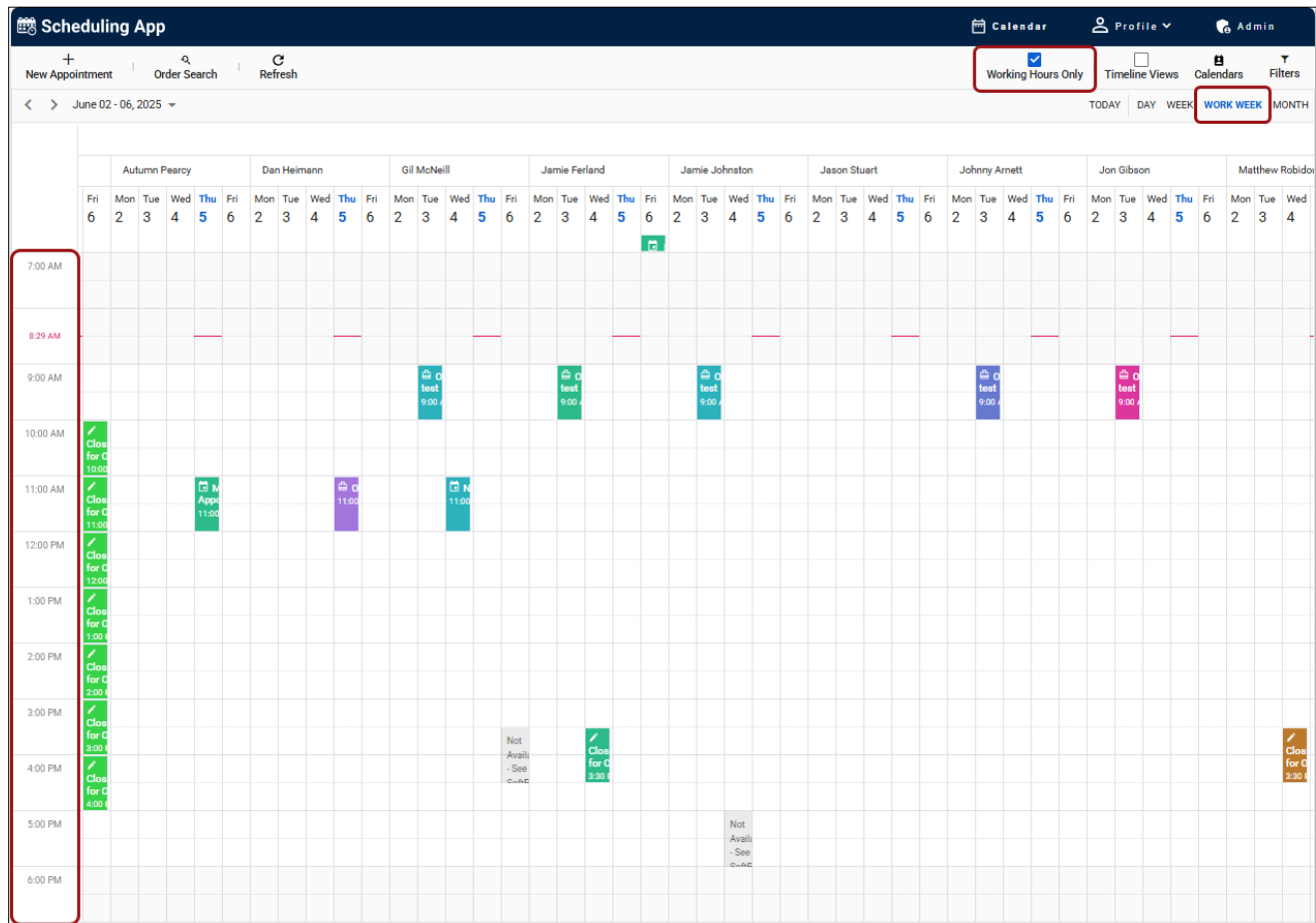
☐ Send Cancellation Notification

Click **Yes** to proceed with the cancellation or **No** to return to the Appointment window.

Setting Work Hours Only/Timeline Views/Calendars/Filters

Working Hours Only

The **Working Hours Only** view displays the calendar in a 7:00am to 7:00pm (local time) view. This is set by default. Unchecking the **Working Hours Only** check box returns the calendar to a 24-hour day. **Working Hours Only** is not displayed when the **Month** view is selected.



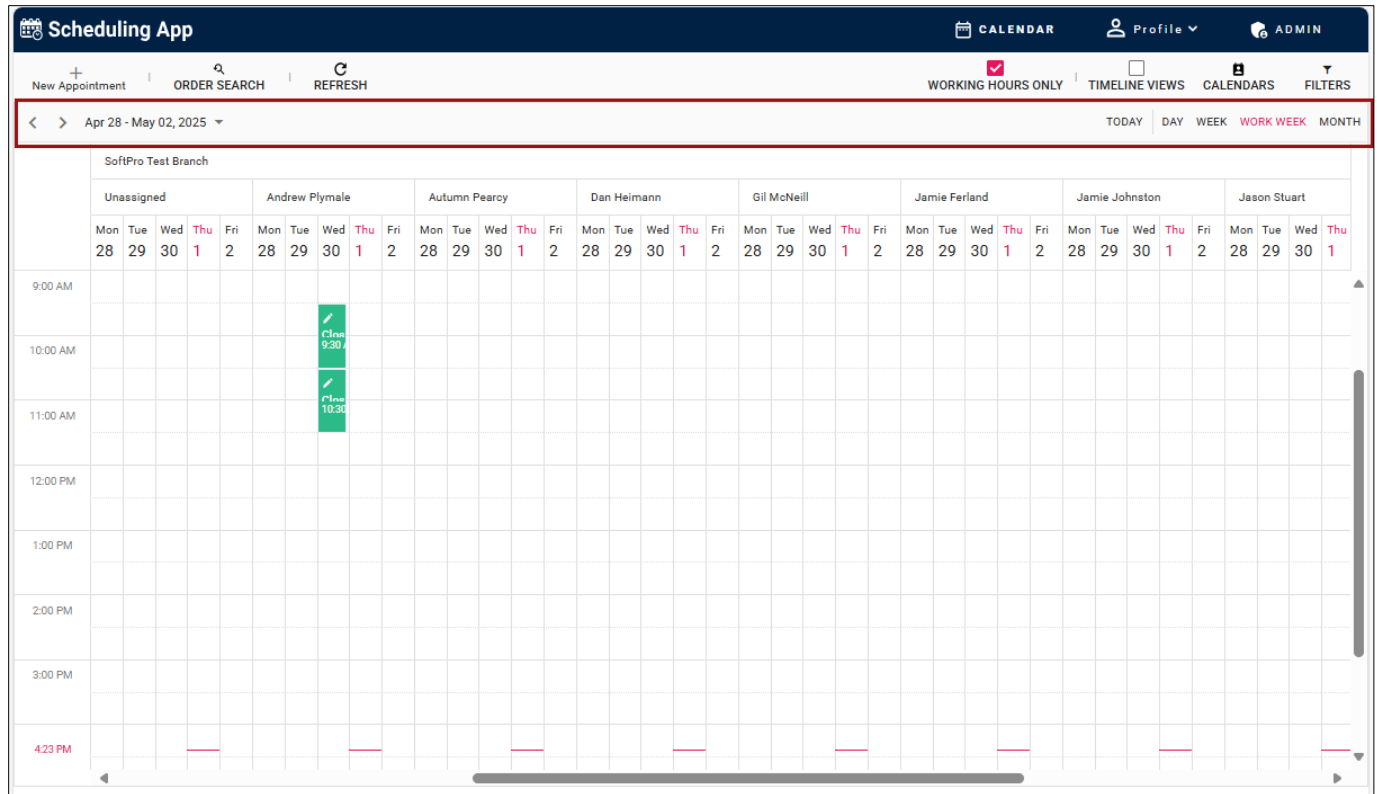
Timeline Views

The **Timeline Views** allows users to change the Calendar view format by checking the **Timeline Views** check box. The view changes from Branch/Users across the top and time on the left to date/time across the top and Branch/Users on the left. The time frame format shown is dependent on the time frame selected: Today, Day, Week, Work Week or Month. Unchecking the **Timeline Views** check box reverts the format.

The screenshot displays the Scheduling App interface. At the top, the header includes 'Scheduling App', 'CALENDAR', 'Profile', and 'ADMIN'. Below the header, there are navigation options: 'New Appointment', 'ORDER SEARCH', and 'REFRESH'. A date range 'Apr 27 - May 03, 2025' is shown. The 'WORKING HOURS ONLY' checkbox is checked. The 'TIMELINE VIEWS' tab is selected, with sub-tabs for 'TODAY', 'DAY', 'WEEK', 'WORK WEEK', and 'MONTH'. The 'WEEK' sub-tab is active, showing a calendar grid for the week of April 27 to May 3, 2025. The grid is organized by branch and user. The left sidebar shows a time slot list from 9:00 AM to 4:13 PM. The main grid shows appointments for various users across the days of the week. A red box highlights the 'TIMELINE VIEWS' tab and the 'WEEK' sub-tab. Another red box highlights the 'TODAY' sub-tab. A third red box highlights the 'WEEK' sub-tab. A fourth red box highlights the 'WEEK' sub-tab. A fifth red box highlights the 'WEEK' sub-tab. A sixth red box highlights the 'WEEK' sub-tab. A seventh red box highlights the 'WEEK' sub-tab. An eighth red box highlights the 'WEEK' sub-tab. A ninth red box highlights the 'WEEK' sub-tab. A tenth red box highlights the 'WEEK' sub-tab. A eleventh red box highlights the 'WEEK' sub-tab. A twelfth red box highlights the 'WEEK' sub-tab. A thirteenth red box highlights the 'WEEK' sub-tab. A fourteenth red box highlights the 'WEEK' sub-tab. A fifteenth red box highlights the 'WEEK' sub-tab. A sixteenth red box highlights the 'WEEK' sub-tab. A seventeenth red box highlights the 'WEEK' sub-tab. An eighteenth red box highlights the 'WEEK' sub-tab. A nineteenth red box highlights the 'WEEK' sub-tab. A twentieth red box highlights the 'WEEK' sub-tab. A twenty-first red box highlights the 'WEEK' sub-tab. A twenty-second red box highlights the 'WEEK' sub-tab. A twenty-third red box highlights the 'WEEK' sub-tab. A twenty-fourth red box highlights the 'WEEK' sub-tab. A twenty-fifth red box highlights the 'WEEK' sub-tab. A twenty-sixth red box highlights the 'WEEK' sub-tab. A twenty-seventh red box highlights the 'WEEK' sub-tab. A twenty-eighth red box highlights the 'WEEK' sub-tab. A twenty-ninth red box highlights the 'WEEK' sub-tab. A thirtieth red box highlights the 'WEEK' sub-tab. A thirty-first red box highlights the 'WEEK' sub-tab. A thirty-second red box highlights the 'WEEK' sub-tab. A thirty-third red box highlights the 'WEEK' sub-tab. A thirty-fourth red box highlights the 'WEEK' sub-tab. A thirty-fifth red box highlights the 'WEEK' sub-tab. A thirty-sixth red box highlights the 'WEEK' sub-tab. A thirty-seventh red box highlights the 'WEEK' sub-tab. A thirty-eighth red box highlights the 'WEEK' sub-tab. A thirty-ninth red box highlights the 'WEEK' sub-tab. A fortieth red box highlights the 'WEEK' sub-tab. A forty-first red box highlights the 'WEEK' sub-tab. A forty-second red box highlights the 'WEEK' sub-tab. A forty-third red box highlights the 'WEEK' sub-tab. A forty-fourth red box highlights the 'WEEK' sub-tab. A forty-fifth red box highlights the 'WEEK' sub-tab. A forty-sixth red box highlights the 'WEEK' sub-tab. A forty-seventh red box highlights the 'WEEK' sub-tab. A forty-eighth red box highlights the 'WEEK' sub-tab. A forty-ninth red box highlights the 'WEEK' sub-tab. A fiftieth red box highlights the 'WEEK' sub-tab. A fifty-first red box highlights the 'WEEK' sub-tab. A fifty-second red box highlights the 'WEEK' sub-tab. A fifty-third red box highlights the 'WEEK' sub-tab. A fifty-fourth red box highlights the 'WEEK' sub-tab. A fifty-fifth red box highlights the 'WEEK' sub-tab. A fifty-sixth red box highlights the 'WEEK' sub-tab. A fifty-seventh red box highlights the 'WEEK' sub-tab. A fifty-eighth red box highlights the 'WEEK' sub-tab. A fifty-ninth red box highlights the 'WEEK' sub-tab. A sixtieth red box highlights the 'WEEK' sub-tab. A sixty-first red box highlights the 'WEEK' sub-tab. A sixty-second red box highlights the 'WEEK' sub-tab. A sixty-third red box highlights the 'WEEK' sub-tab. A sixty-fourth red box highlights the 'WEEK' sub-tab. A sixty-fifth red box highlights the 'WEEK' sub-tab. A sixty-sixth red box highlights the 'WEEK' sub-tab. A sixty-seventh red box highlights the 'WEEK' sub-tab. A sixty-eighth red box highlights the 'WEEK' sub-tab. A sixty-ninth red box highlights the 'WEEK' sub-tab. A seventieth red box highlights the 'WEEK' sub-tab. A seventy-first red box highlights the 'WEEK' sub-tab. A seventy-second red box highlights the 'WEEK' sub-tab. A seventy-third red box highlights the 'WEEK' sub-tab. A seventy-fourth red box highlights the 'WEEK' sub-tab. A seventy-fifth red box highlights the 'WEEK' sub-tab. A seventy-sixth red box highlights the 'WEEK' sub-tab. A seventy-seventh red box highlights the 'WEEK' sub-tab. A seventy-eighth red box highlights the 'WEEK' sub-tab. A seventy-ninth red box highlights the 'WEEK' sub-tab. An eightieth red box highlights the 'WEEK' sub-tab. An eighty-first red box highlights the 'WEEK' sub-tab. An eighty-second red box highlights the 'WEEK' sub-tab. An eighty-third red box highlights the 'WEEK' sub-tab. An eighty-fourth red box highlights the 'WEEK' sub-tab. An eighty-fifth red box highlights the 'WEEK' sub-tab. An eighty-sixth red box highlights the 'WEEK' sub-tab. An eighty-seventh red box highlights the 'WEEK' sub-tab. An eighty-eighth red box highlights the 'WEEK' sub-tab. An eighty-ninth red box highlights the 'WEEK' sub-tab. A ninetieth red box highlights the 'WEEK' sub-tab. A ninety-first red box highlights the 'WEEK' sub-tab. A ninety-second red box highlights the 'WEEK' sub-tab. A ninety-third red box highlights the 'WEEK' sub-tab. A ninety-fourth red box highlights the 'WEEK' sub-tab. A ninety-fifth red box highlights the 'WEEK' sub-tab. A ninety-sixth red box highlights the 'WEEK' sub-tab. A ninety-seventh red box highlights the 'WEEK' sub-tab. A ninety-eighth red box highlights the 'WEEK' sub-tab. A ninety-ninth red box highlights the 'WEEK' sub-tab. A hundredth red box highlights the 'WEEK' sub-tab.

Timeline Views Toolbar

Clicking the time frame (on the right) changes the calendar view to the selected view for all Branches and Users displayed. The corresponding dates are also shown on the left of **Timeline Views** toolbar and using the Left/Right arrows moves the calendar forward/back by the selection made (Day, Week, Work Week, Month).



- **Today** brings the user back to the current date when a future/prior date is selected
- **Day \Timeline Day** only shows the current date across all Branches/Users
- **Week \Timeline Week** shows Sunday through Saturday of the current week with the current date highlighted
- **Work Week \ Timeline Work Week** shows Monday through Friday of the current week with the current date highlighted
- **Month \ Timeline Month** shows the current month with the current date highlighted

Scheduling App CALENDAR Profile ADMIN

New Appointment ORDER SEARCH REFRESH WORKING HOURS ONLY TIMELINE VIEWS CALENDARS FILTERS

< > May 1, 2025 TODAY DAY WEEK WORK WEEK MONTH

SoftPro Test Branch

Unassigned	Andrew P...	Autumn P...	Dan Heim...	Gil McNeill	Jamie Fer...	Jamie Jo...	Jason Stu...	Johnny Ar...	Jon Gibson	Nicole Ly...	Susan Riv...
Thu 1	Thu 1	Thu 1	Thu 1	Thu 1	Thu 1	Thu 1	Thu 1	Thu 1	Thu 1	Thu 1	Thu 1

9:00 AM

Scheduling App CALENDAR Profile ADMIN

New Appointment ORDER SEARCH REFRESH WORKING HOURS ONLY TIMELINE VIEWS CALENDARS FILTERS

< > Apr 27 - May 03, 2025 TODAY DAY WEEK WORK WEEK MONTH

SoftPro Test Branch

Unassigned	Andrew Plymale	Autumn Percy	Dan Heimann	Gil McNeill
Sun 27 Mon 28 Tue 29 Wed 30 Thu 1 Fri 2 Sat 3	Sun 27 Mon 28 Tue 29 Wed 30 Thu 1 Fri 2 Sat 3	Sun 27 Mon 28 Tue 29 Wed 30 Thu 1 Fri 2 Sat 3	Sun 27 Mon 28 Tue 29 Wed 30 Thu 1 Fri 2 Sat 3	Sun 27 Mon 28 Tue 29 Wed 30 Thu 1 Fri 2 Sat 3

9:00 AM

Scheduling App CALENDAR Profile ADMIN

New Appointment ORDER SEARCH REFRESH WORKING HOURS ONLY TIMELINE VIEWS CALENDARS FILTERS

< > Apr 28 - May 02, 2025 TODAY DAY WEEK WORK WEEK MONTH

SoftPro Test Branch

Unassigned	Andrew Plymale	Autumn Percy	Dan Heimann	Gil McNeill	Jamie Ferland
Mon 28 Tue 29 Wed 30 Thu 1 Fri 2	Mon 28 Tue 29 Wed 30 Thu 1 Fri 2	Mon 28 Tue 29 Wed 30 Thu 1 Fri 2	Mon 28 Tue 29 Wed 30 Thu 1 Fri 2	Mon 28 Tue 29 Wed 30 Thu 1 Fri 2	Mon 28 Tue 29 Wed 30 Thu 1 Fri 2

9:00 AM

Scheduling App Calendar Profile Admin

New Appointment Order Search Refresh Timeline Views Calendars Filters

< > June 2025 TODAY DAY WEEK WORK WEEK MONTH

SoftPro Test Branch IL

Unassigned	Andrew Plymale	Autumn Percy	Dan Heimann	Gil McNeill	Jamie Ferland
Jun 1 2 3 4 5 6 7	Jun 1 2 3 4 5 6 7	Jun 1 2 3 4 5 6 7	Jun 1 2 3 4 5 6 7	Jun 1 2 3 4 5 6 7	Jun 1 2 3 4 5 6 7

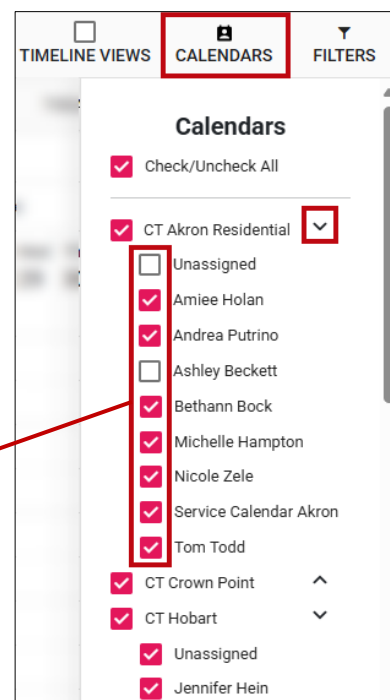
9:00 AM

Calendars

The **Calendars** panel displays the Branch name along with those users that have been associated with the Branch as well as an **Unassigned** placeholder. Click the **Calendars** button to open the panel; click again to close the panel without making any changes.

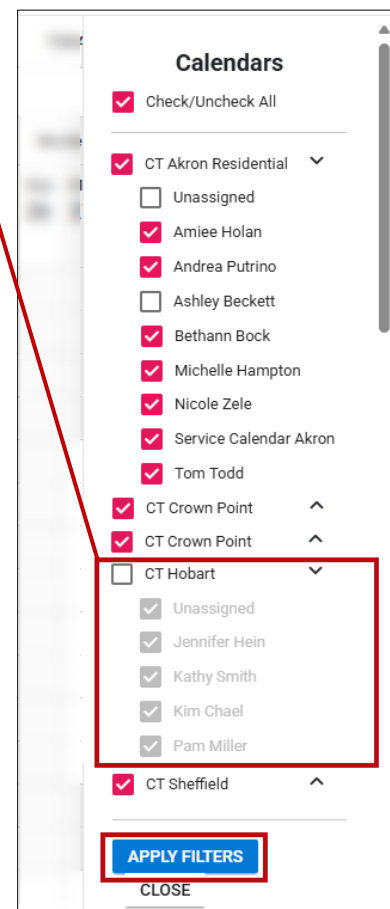
The **Calendars** panel shows only the Branches and associated Users that the current logged in user has been associated with. Each Branch can be expanded/closed by clicking the **Expand/Close** ☒ icon to the right of the Branch name. The default setting is to show all expanded.

Checking/unchecking the corresponding check box users can filter what Branch and/or User calendars are displayed. At least one user must be selected to view the Branch calendar. Use the **Check/Uncheck All** check box to quickly check or uncheck all entries.



When the Branch check box is unchecked the associated user check boxes are disabled, and that Branch is not shown in the Calendar view once the filter is applied.

Click the **Apply Filters** button to save and refresh the Calendar and close the Calendars panel. Clicking the **Close** button closes the panel without saving any changes.



Filters

Users can filter the Calendar view by utilizing the **Filters** panel.

Users have the option of filtering on,

- **Appointment Type** – Closing/Signing, Order Processing, Out of Office, Other
- **Location Type** – Onsite, Offsite, Online, Mail Away, TBD

Filter appointments by checking individual, multiple or all

Appointment Type and/or **Location Type** fields. **Check/Uncheck All** check box to quickly check or uncheck all entries.

There are also additional filters that can be set by entering text or values found in the appointment fields.

- **Filter by specific text** (all available fields)
- **Appointment title**
- **Appointment notes**
- **Location name/ address**

Click the **Apply Filters** button to apply the selections made. The calendar refreshes with the applied filters. Clicking the **Close** button closes the tab without saving any changes.

When a Filter is applied, the **Filter** identifier icon is displayed after the label to remind you there is a filter applied.