

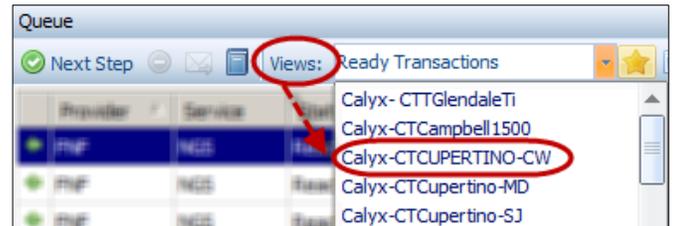
## Accepting Orders in SoftPro Select

Follow these steps to accept the Calyx order into your SoftPro Select order.

1. From the **360** ribbon, click the **Login** button
2. Once logged in, click the **360 Queue** button



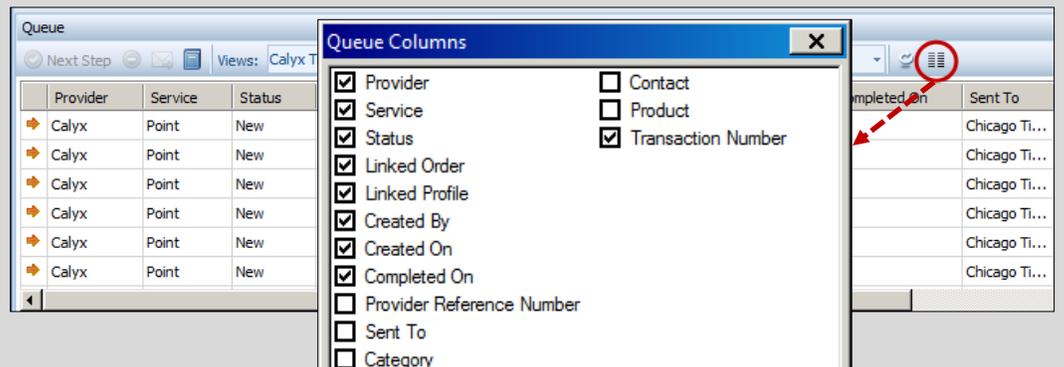
3. From the **Views** drop-down, select your **Saved View** (if you do not have a Calyx saved View, refer to [CALYX – Creating a Saved View in SPS](#))



Your Queue populates with all Calyx transactions for your Branch.

Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On	Completed On	Sent To	Description
Calyx	Point	New			tamikar@com...	7/17/2015 9:...		Chicago Ti...	James, Nicole, 852 J. Street Cupertino, CA, Escrow
Calyx	Point	New			tamikar@com...	7/17/2015 9:...		Chicago Ti...	James, Nicole, 852 J. Street Cupertino, CA, Title
Calyx	Point	New			crystal.grang...	6/19/2015 3:...		Chicago Ti...	Buyer, Test, 23 Jam St Durham, NC, Title
Calyx	Point	New			tamikar@com...	6/10/2015 9:...		Chicago Ti...	Smith, Carrie, 22 Sample Lane Livermore, CA, Title
Calyx	Point	New			tamikar@com...	5/29/2015 1:...		Chicago Ti...	test, I, 145 Test Way Livermore, CA, Escrow
Calyx	Point	New			tamikar@com...	5/29/2015 1:...		Chicago Ti...	test, I, 145 Test Way Livermore, CA, Title

NOTE: Additional data may be added (or removed) by clicking the **Columns** icon. Check the corresponding check box for the information you wish to display (or uncheck to remove a column).



## Accepting Orders in SoftPro Select

Each transaction has two entries, (identified in the **Description** field):

- > Escrow
- > Title

Sent To	Description
Chicago Ti...	James, Nicole, 852 J. Street Cupertino, CA, Escrow
Chicago Ti...	James, Nicole, 852 J. Street Cupertino, CA, Title
Chicago Ti...	Buyer, Test, 23 Jam St Durham, NC, Title

### Importing Calyx Data

4. Highlight the applicable order
5. Click the **Next Step** button

Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On	Completed On	Sent To	Description
Calyx	Point	New			tamika@com...	7/17/2015 9:...		Chicago Ti...	James, Nicole, 852 J. Street Cupertino, CA, Escrow
Calyx	Point	New			tamika@com...	7/17/2015 9:...		Chicago Ti...	James, Nicole, 852 J. Street Cupertino, CA, Title
Calyx	Point	New			crystal.grang...	6/19/2015 3:...		Chicago Ti...	Buyer, Test, 23 Jam St Durham, NC, Title
Calyx	Point	New			tamika@com...	6/10/2015 9:...		Chicago Ti...	Smith, Carrie, 22 Sample Lane Livermore, CA, Title
Calyx	Point	New			tamika@com...	5/29/2015 1:...		Chicago Ti...	test, I, 145 Test Way Livermore, CA, Escrow
Calyx	Point	New			tamika@com...	5/29/2015 1:...		Chicago Ti...	test, I, 145 Test Way Livermore, CA, Title

6. From the **Review** window, click the **Order Search** button

7. Make note of the property address, as it is needed in the next step

Name	Current Value	New Value
Buyer Type		Male
First Name		Nicole
Last Name		James
SSN		123-45-6789
Address1		852 J. Street
City		Cupertino

8. To narrow your search, enter the street number in the **Address** field and the City name in the **City/State/Zip** field

**Order Search**

Order Information

Order #:  Who has the file:

Settlement date: (None) through (None) Order status:

Order reserved: (None) through (None) Escrow status:

Order received: (None) through (None) Title status:

Order completed: (None) through (None) Loan #:

Project name:  Mtg. ins. case #:

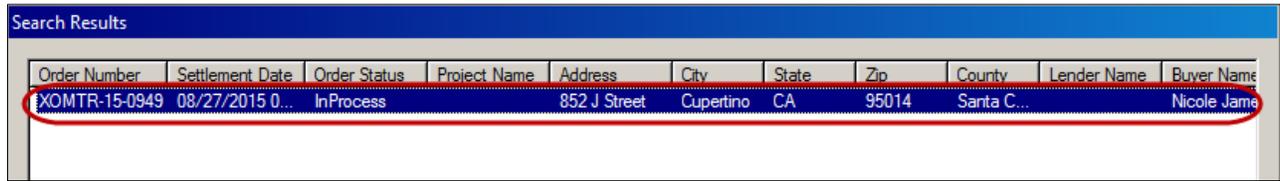
Property Information

Address:

City/State/Zip:     Foreign

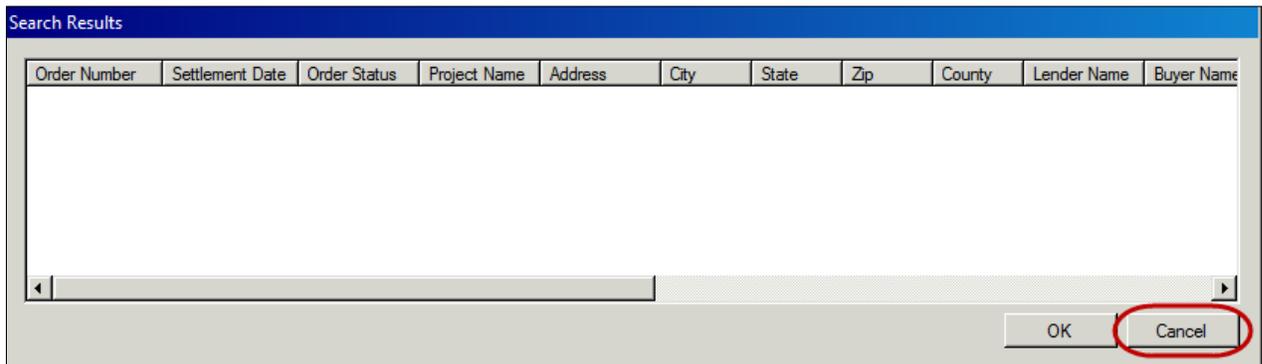
## Accepting Orders in SoftPro Select

9. From the **Search Results** window, double-click the order to open (the order opens in the background)



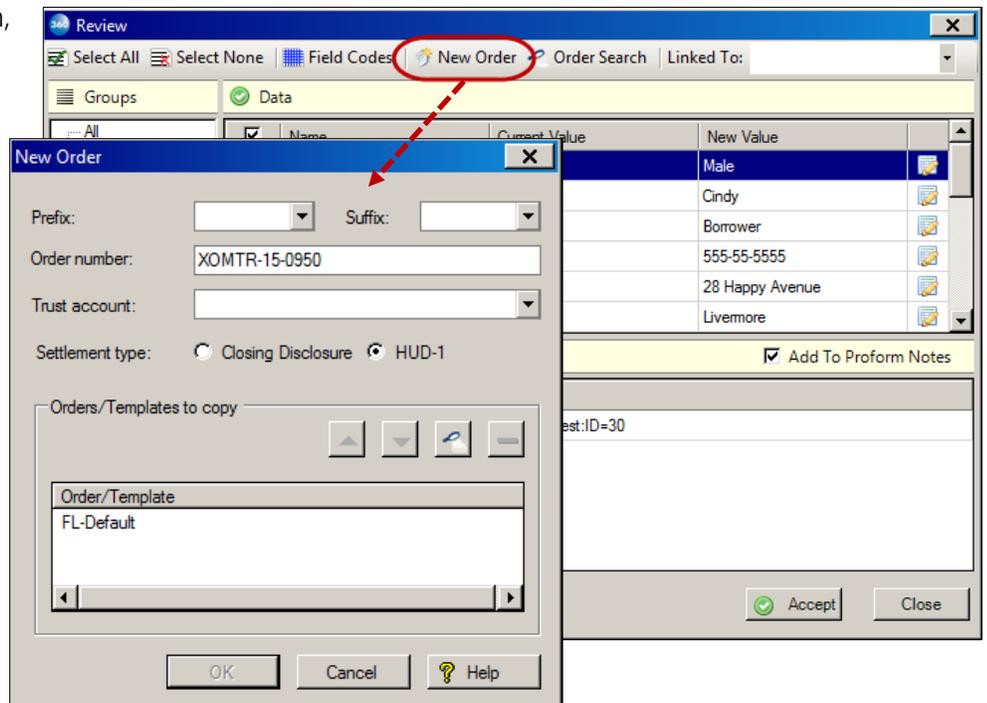
If no results display, a new order must be created.

- a. Click the **Cancel** button



- b. Close the **Search** window
- c. When on the **Review** screen, click the **New Order** button

- d. From the **New Order** window, select the appropriate templates; click **OK** to open the order

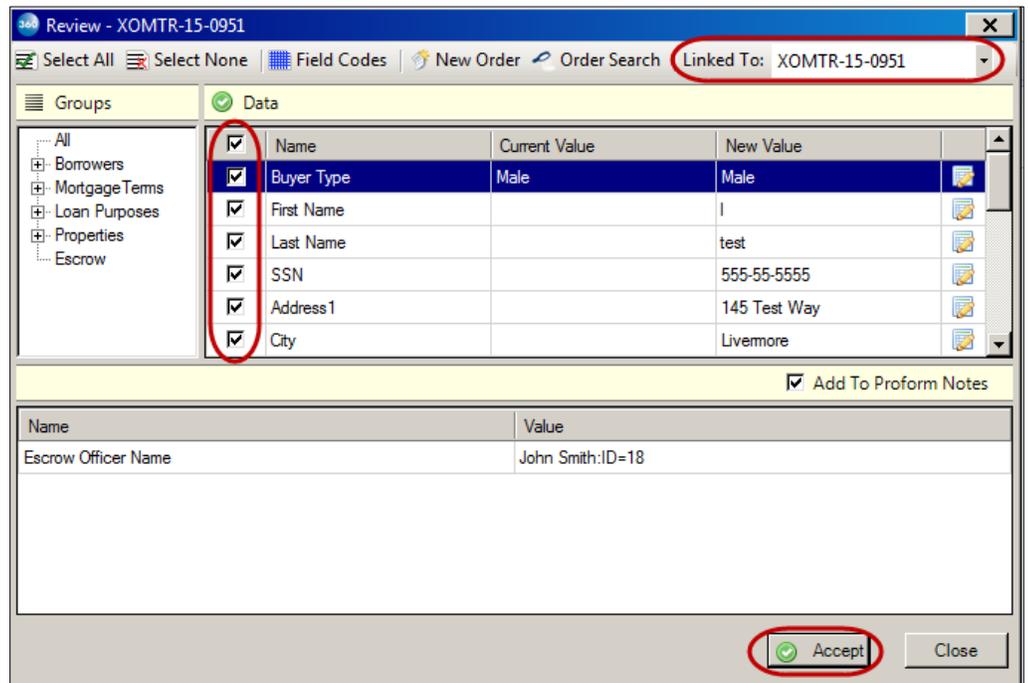


The Order opens in the background and you are returned to the **Review** screen.

- e. Continue with **Step 10**

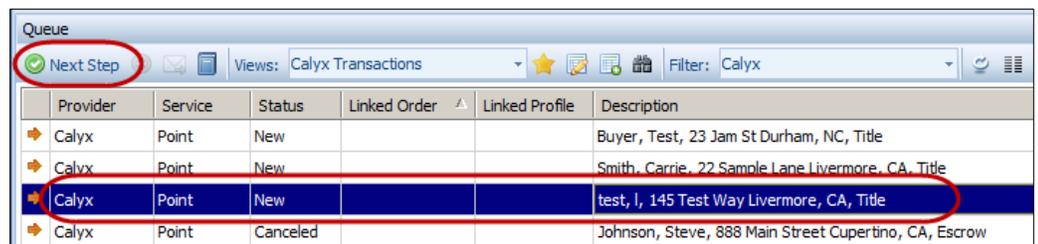
## Accepting Orders in SoftPro Select

10. In the **Review** window, from the **Linked To** drop-down, select the number of the opened order
11. Check (or uncheck) all applicable check boxes in the **Data** section to import into the SoftPro order
12. Click the **Accept** button to import the applicable Data



With your SPS Order still open,

13. Click the **Queue** tab
14. Highlight the Title entry
15. Click the **Next Step** button
16. Repeat **Steps 10-12**
17. Save and exit your Order



The **Queue** now shows the Order as **In Progress** and identifies the SPS Linked Order.

