

Creating a Saved View in SoftPro Select

Follow these steps to create a saved View of your Calyx orders using your Brand/Branch name.

1. From the **360** ribbon, click the **Login** button

NOTE: If you do not have a 360 account, refer to [SoftPro 360 – Registering for a New Account with Okta](#) to complete the one-time registration process.

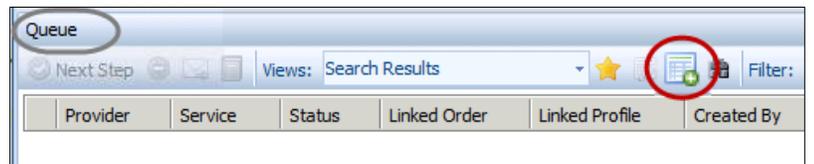


2. Once logged in, click the **360 Queue** button

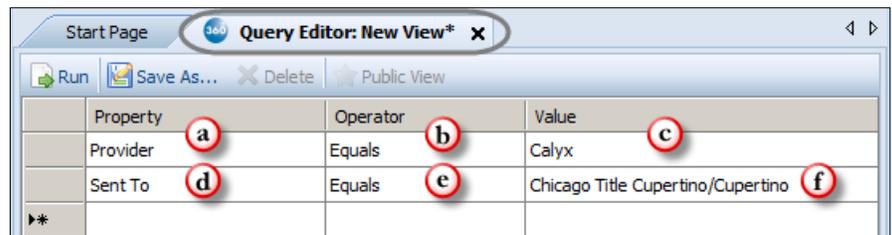


This opens the **Queue** at the bottom of the screen.

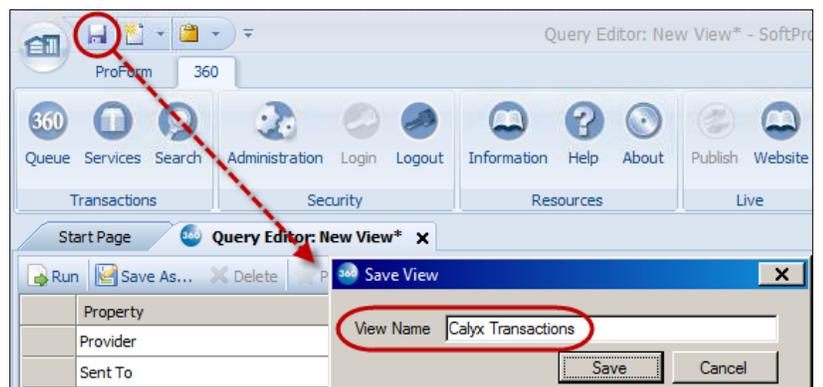
3. Click the **New View**  icon to open the **Query Editor: New View** tab



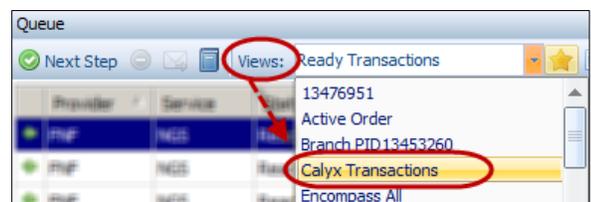
4. On the first line,
 - a. **Property**, select **Provider**
 - b. **Operator**, select **Equals**
 - c. **Value**, enter **Calyx**
5. On the second line,
 - d. **Property**, select **Sent To**
 - e. **Operator**, select **Equals**
 - f. **Value**, enter your Brand/Branch name



6. Click the **Save** button (or press **Ctrl + S** keyboard shortcut)
7. Enter your **View Name** when prompted, click the **Save** button



Your view then appears in the **Views** drop-down.



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Once you've setup your Views, you can then add them to your Favorite Views on the 360 Queue toolbar.

1. Click the **Favorite Views** icon

	Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On	Completed
➔	RealEC	Exchange	In Progress	XOMTR-15-0919	Default\T\FL\FT\Escrow-Training	RealEC Servic...	5/12/2015 8:...	
➔	RealEC	Exchange	In Progress	XOMTR-15-0919	\\Default\T\FL\FT\Escrow-Training	RealEC Servic...	5/12/2015 8:...	
➔	RealEC	Exchange	In Progress	XOMTR-15-0848	Default\T\FL\FT\Escrow-Training	RealEC Servic...	5/1/2015 5:0...	
➔	RealEC	Exchange	New			RealEC Servic...	5/1/2015 5:0...	

2. Check the check box of the view you wish to add (you can add up to three views)
3. Click the **OK** button

View Name	Display Name
<input checked="" type="checkbox"/> Branch PID13453260	
<input type="checkbox"/> Active Order	
<input type="checkbox"/> Historical Trans	
<input type="checkbox"/> My Transactions	
<input type="checkbox"/> Mya	
<input type="checkbox"/> New	
<input checked="" type="checkbox"/> New Transactions	
<input type="checkbox"/> Calyx Transactions	

Your three **Favorite Views** now appear on the toolbar preceded by the number of transactions in each view.

Click on the View name to see the list of corresponding transactions.

Created On	Completed On	Sent To	Description
2/12/2016 9:...			https://twcustomertrainfuture.titlewave.net/ContentPac
1/21/2016 11...			https://twcustomertrainfuture.titlewave.net/ContentPac
1/12/2016 2:...		Kendra D.	Example Copy Sheet - 128 Construction Way, San Jose