

Adding/Updating Contacts

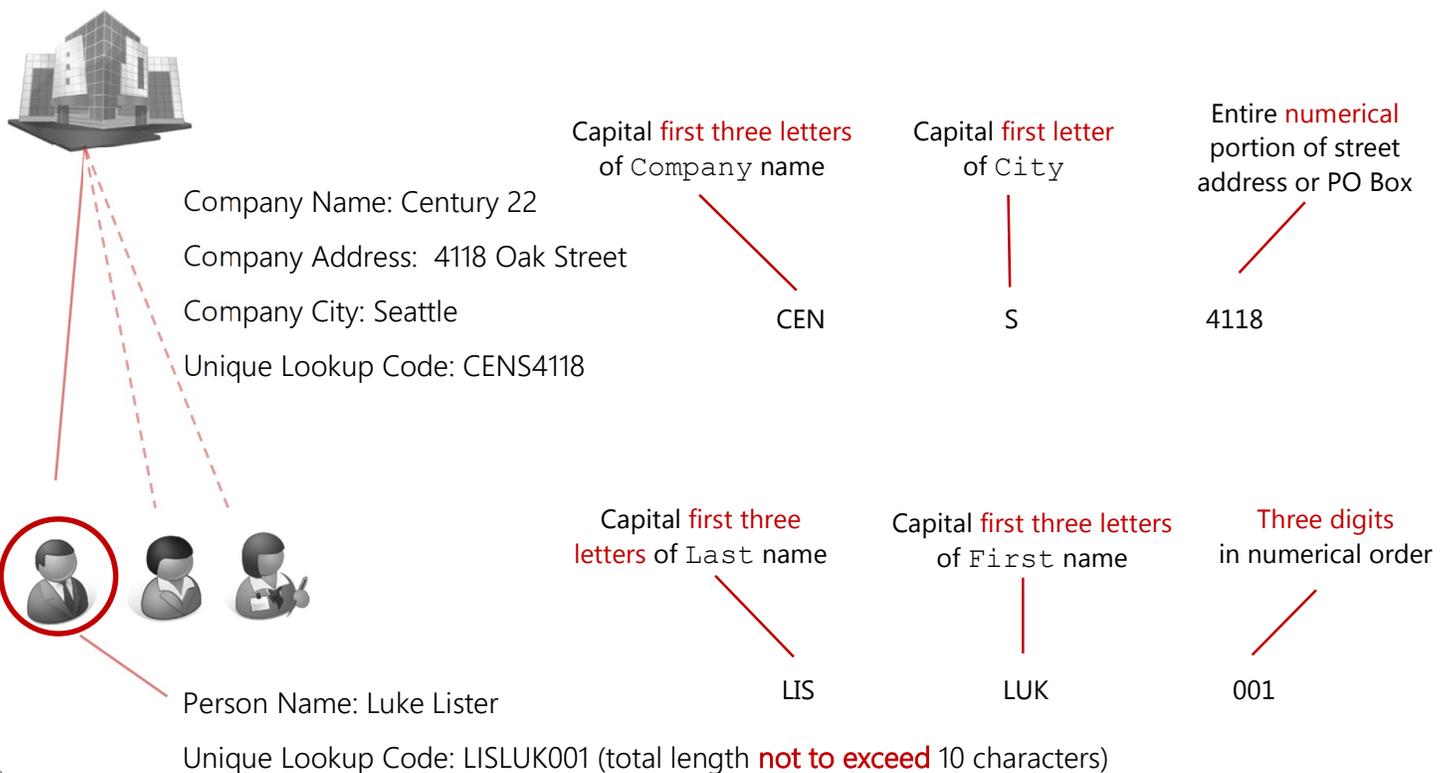
Only users who have permissions may add to or update lookup tables. Before adding a Company or a Person to a lookup table, you must search using three different methods to safeguard against duplicating existing Companies/People. This job aid contains the following sections:

- A. Formatting Unique Lookup Codes, Page 1
- B. Running and Interpreting the Lookup Table Report, Page 2
- C. Companies (organizational entities)
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A. Formatting Unique Lookup Codes

Follow these formatting rules to create unique lookup codes for each Company and Person.

NOTE: Your Operation's format may vary slightly. If you are not sure, please ask your manager.



Adding/Updating Contacts

B. Running and Interpreting the Lookup Table Report

Those who have permissions to edit lookup tables are responsible for periodically running a report to identify new and updated Contacts. Using the information in the report, you will add/update the appropriate lookup tables.

Running the Report

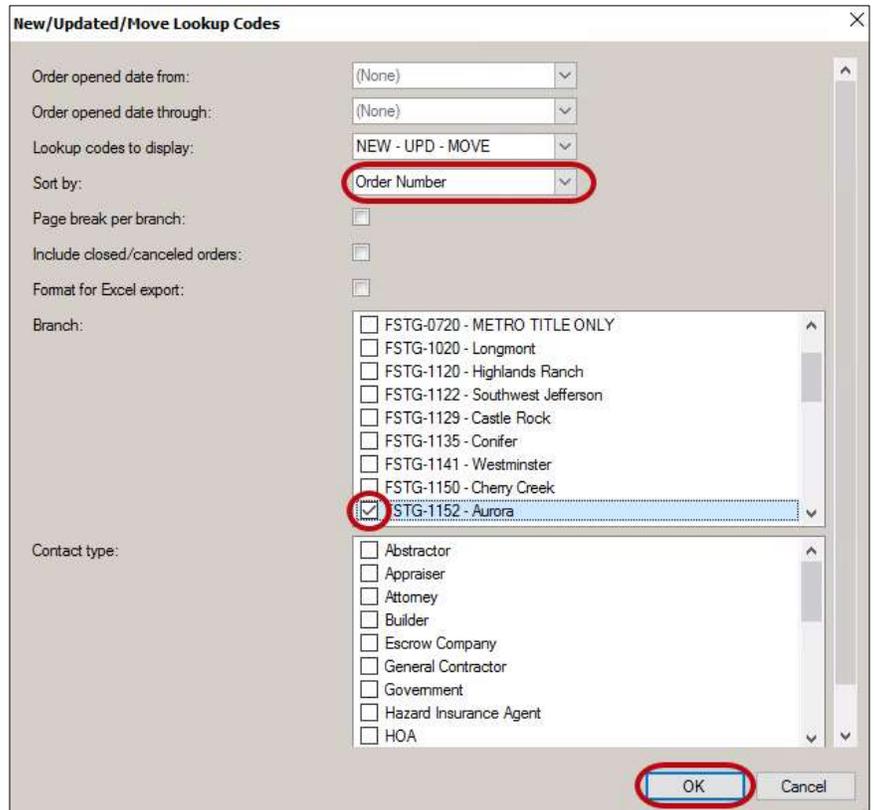
1. Click the **Reports** button



2. Expand the **Lookup Table Reports** folder
3. Double-click the **New/Updated/Move Lookup Codes** report



4. In **Sort by**, select **Order Number**
5. Check your branch
6. Click **OK**



Adding/Updating Contacts

Interpreting the Report

Each row represents an order. There are effectively three columns.

First column:

Company "Contact" information

Second column:

Person information

Third column:

Order information

BRANCH: FSTG-1152 - Fidelity National Title Company - Aurora (continued)		
<p>New Contact: Mug a Bug Other 12234 Smith St Aurora, CO 46576</p>		<p>Examiner: Received Date: 10/07/21 04:21 pm Received By: Teri Hess Order Number: 120-XF00577-21 Closer: Julie Hellvig Examiner: Received Date: 10/25/21 06:32 am Received By: Rob Perry Order Number: 120-XF00597-21-Id Closer: Examiner: Received Date: 10/25/21 06:32 am Received By: Lisa Decker Order Number: 122-XF01457-21 Closer: Examiner: Received Date: 11/12/21 08:14 am Received By: Jessica R. Al-Uffi</p>
<p>Existing Contact: Keller Williams Performance Realty Selling Agent/Broker 1191096</p>	<p>New Person: Connie Coordinator 1528 Fortino Blvd. Pueblo, CO 81008</p>	
<p>Existing Contact: Abetter Realty Selling Agent/Broker 1165651</p>	<p>Move Person: Kimberly Nakaguma 540-A E Abriendo Pueblo, CO 81004 Cell: 719-289-1999 Phone: 719-583-1100 Fax: 719-583-9900 Email: kimberly.nakaguma@gmail.com</p>	
<p>Updated Contact: 5 Star Bank Lender 104 South Cascade Ave., Suite 111 Colorado Springs, CO 80903 Phone: 719-475-7827 Fax: 719-475-8884</p>		<p>Order Number: 120-XF01407-21 Closer: Jenn Martin Examiner: Received Date: 12/03/21 10:37 am Received By: Dan Heimann</p>

› If **Existing Company**, then look at second column

› If **Updated Person**, take note of updated information

› Notice **Order Number** to search in SoftPro Select

› If **New Person**, then notice new information

› Notice **Order Number** to search in SoftPro Select

› If **Move Person**, take note of new Company information

› Notice **Order Number** to search in SoftPro Select

› If **Updated Company**, then notice updated information

› If **New Company**, take note of new information

To interpret the report:

1. Look at the new/updated information in the first two columns
2. Determine which Companies/People to add/update/move
3. Use the SoftPro Select order number in the third column to access the order
4. Use the Contact Type in the first column to access the appropriate lookup table

Adding/Updating Contacts

C1. Searching for a New Company Before Adding

Before adding a Company, you must search for it three different ways using advanced filtering. This is to prevent duplicate entries. In our example, we are adding a Bank of America Company in the city of Fort Worth.

1. Access the appropriate order (from the third column of the report)
2. Access the appropriate Contact Type lookup table (from the first column of the report)
3. Click the **Show Filter** icon

LookupCode	Name	PayeeName	Address1	Address2	City	State	Zip
360A11305	360 Mor...	360 Mortgage...	11305 Four P...	Bldg 1, Ste ...	Austin	TX	78726
AcaG1707	Academ...	Academy Mort...	1707 Cole Blv...		Golden	CO	80401
AcaS1220	Academ...	Academy Mort...	1220 East 780...		Sandy	UT	84094

Search Method 1 - Name

4. In the **Filter** drop-down, select **Name**
5. In the **Search by** drop-down, select **Contains**
6. In the **Search** field, enter a part of the Company name
7. Click **Apply**

LookupCode	Name	PayeeName	Address1	Address2	City	State	Zip
AllF1100	Ally Ban...	Ally Bank, Wholesale Le...	1100 Virginia ...		Fort ...	PA	15
AmeI1	America...	American Interbanc Mo...	1 Park Plaze, ...		Irvine	CA	9:
BanC2000	Bank of ...	Bank of America	2000 Clayton ...		Concord	CA	9-
BanC8790	Bank of ...	Bank of America, NA	8790 Govern...		Cincin...	OH	4:

If the Company name does not appear in the list, click the **Remove** button to complete **Search Method 2**. If the Company name appears in the list, determine if the entry is a duplicate.

LookupCode	Name	PayeeName	Address1	Address2	City	State	Zip
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Search Method 2 - Street Address

8. In the **Filter** drop-down, select **Address1**; in the **Search by** drop-down, select **Contains**
9. In the **Search** field, enter only the street numbers
10. Click **Apply**

LookupCode	Name	PayeeName	Address1	Address2	City	State	Zip
NatL001	Nations...	Nationstar Mortgage LLC	123 E Highwa...		Lewis...	TX	7506
PinR002	Pinnade...	Pinnacle Capital Mortga...	121230 E. Ro...	Suite 248	Roseville	CA	9566
PlaR002	Platinu...	Platinum Home Mortgag...	2123 Hicks Ro...		Rolling...	IL	6000:
RPMS001	RPM Mo...	RPM Mortgage	123 Soquel Av...		Santa ...	CA	9506

If the Company address does not appear in the list, click the **Remove** button to complete **Search Method 3**. If the Company address appears in the list, determine if the entry is a duplicate.

Adding/Updating Contacts

Search Method 3 – Lookup Code

Search for the beginning letters of the new code you wish to add, so that you can see which codes already exist. This helps you to formulate the new unique code including all letters and numbers.

11. In the **Filter** drop-down, select **LookupCode**
12. In the **Search by** drop-down, select **Contains**
13. In the **Search** field, enter the first three letters of the code you wish to add
14. Click **Apply**

LookupCode	Name	PayeeName	Address1	Address2	City	State	Zip
BanC2000	Bank of ...	Bank of America	2000 Clayton ...		Concord	CA	94524
BanC8790	Bank of ...	Bank of America, NA	8790 Govern...		Cincin...	OH	45241
BanD1440	Bank of ...	Bank of America, N.A.	1440 Bridgega...	STE #350	Diamo...	CA	91761

C2. Adding a New Company

Before adding a Company, you must use advanced filter searching for the Company using three different search methods.

1. If necessary, access the order as shown in the third column of the report
2. If necessary, access the Contact Type lookup table (from the first column of the report)
3. In the **Lookup code** field, enter the new unique code and press the **Tab** key
4. Review the Contact's information (fix any spelling/formatting errors)
5. Click the **Lookup code** link
6. Click the **Insert Entry** button

NOTE: The entry is not visible yet.

When you scroll to the bottom of the list, the entry appears in **bold** text.

BEFORE SAVE: entries added or modified in lookup tables appear in **bold** text.

LookupCode	Name	PayeeName	Address1	Address2	City	State	Zip
360A11305	360 Mor...	360 Mortgage Group, LLC	11305 Four P...	Bldg 1, Ste ...	Austin	TX	7...
AcaG1707	Academ...	Academy Mortgage	1707 Cole Blv...		Golden	CO	80...
AcaS1220	Academ...	Academy Mortgage Cor...	1220 East 780...		Sandy	UT	84...
AcaS3415	Academ...	Academy Mortgage Cor...	3415 Brooksid...		Stockton	CA	95...

WJBS100	W.J. Br...	W.J. Bradley Mortgage...	100 W. Town...		Sandy	UT	84...
WJBT672	W.J. Br...	W.J. Bradley Mortgage...	672 W. 11th S...		Tracy	CA	95...
WorS9089	World ...	World Wide Credit Corp...	9089 Clairemo...		San Di...	CA	92...
BANS123	Bank of...	Bank of America	123 Clayton ...		Sacra...	CA	9...

7. Click the **Save** icon

Adding/Updating Contacts

AFTER SAVE: entries added or modified in lookup tables appear in normal text.

WJBS100	W.J. Br...	W.J. Bradley Mortgage...	100 W. Town...	Sandy	UT	8-
WJBT672	W.J. Br...	W.J. Bradley Mortgage...	672 W. 11th S...	Tracy	CA	9:
WorS9089	World ...	World Wide Credit Corp...	9089 Clairemo...	San Di...	CA	9:
BANS123	Bank of ...	Bank of America	123 Clayton R...	Sacra...	CA	9:
* Click here to enter a new row.						

D1. Searching for a Person Before Adding

Before adding a Person, you must search for him/her three different ways using advanced filtering. In our example, we are adding Penny Cash, a loan officer at the Bank of America Company in Fort Worth.

1. If necessary, access the order (from the third column of the report)
2. If necessary, access the Contact Type's Person lookup table (from the first column of the report)
3. Click the **Show Filter** icon
4. Click the **Remove** button to search **all** People associated with that Contact Type

BEFORE CLICKING THE REMOVE BUTTON: by default, only the People associated to Company's lookup code appear.

Lookup Table - C - Order Contact - Person - CA.SM.CT

Filter: Filter: LookupCode Equals CEN999 Apply Remove

LookupCode	CourtesyTitle	FirstName	MiddleName	LastName	Suffix	Title	Address
dan999		Dan		Heimann			
LISLUK999		Luke		Lister			
SELSAM001		Samuel		Selling			
SELSAM002		Sam		Selling			
SELSAM003		Sammy		Selling			
* Click here to enter a new row.							

AFTER CLICKING THE REMOVE BUTTON: all the People in that Contact Type's lookup table appear.

Lookup Table - C - Order Contact - Person - CA.SM.CT

Filter: Filter: LookupCode Equals CEN999 Apply Remove

LookupCode	CourtesyTitle	FirstName	MiddleName	LastName	Suffix	Title	Address
Aabalos		Amelia		Abalos			
Aagbayani		Amy		Agbayani			
Aan		Annie		An			
Aatienza		Alice	G.	Atienza			
Ablock		Andy		Block			
Acelemin		Angelita		Celemin			
ADAODO001		Adam		O'Donnell			
Adiaz		Arnoldo		Diaz			
Afergerson		Arlie		Fergerson			
Afujimoto		Allison		Fujimoto			
Agalli		Anthony		Galli			
Akidwell		Andrew		Kidwell			
Amerrill		Aida		Merrill			
Amettler		Andre		Mettler			

Adding/Updating Contacts

Search Method 1 – First Name

1. when entering a new contact, make sure to follow the guidelines to not exceed the 10-character limitation.
2. In the **Filter** drop-down, select **FirstName**
3. In the **Search by** drop-down, select **Contains**
4. In the **Search** field, enter a part of the Person's first name
5. Click **Apply**

LookupCode	CourtesyTitle	FirstName	MiddleName	LastName	Suffix	Title	Email
ABESPE001		Spencer		Abersold			spence.
ATEOPE001		Peng.	H.	Teo			pengte.
JOHPEN001		Penny		Johnson			penny..
JonPen001		Penny		Jones			penilan.
LACPEN001		Penelope		Lacy			penelo.

If the Person's first name does not appear in the list, click the **Remove** button to complete **Search Method 2**. If the Person's first name appears in the list, skip to **Page 9 Reassigning a Person from One Company to Another**.

Search Method 2 – Last Name

6. In the **Filter** drop-down, select **LastName**
7. In the **Search by** drop-down, select **Contains**
8. In the **Search** field, enter a part of the Person's last name
9. Click **Apply**

LookupCode	CourtesyTitle	FirstName	MiddleName	LastName	Suffix	Title	Em
ACASLAJ01		Lauren		Cassill			lau
ACASLA002		Lauri		Cass			rea
APUSSIM001		Simona		Puscas			sim
CASADA001		Adam		Cassie			ace
CASAN001		Ann		Casey			ann

If the Person's last name does not appear in the list, click the **Remove** button to complete **Search Method 3**. If the Person's last name appears in the list, skip to **Page 9 Reassigning a Person from One Company to Another**.

Search Method 3 – Lookup Code

Search for the first six letters of the new code you wish to add, so that you can see the existing codes. This helps you to formulate the new unique code.

10. In the **Filter** drop-down, In the **Filter** drop-down, select **LookupCode**; in the **Search by** drop-down, select **Contains**
11. In the **Search** field, enter the six few letters of the code you wish to add and
12. Click **Apply**

LookupCode	CourtesyTitle	FirstName	MiddleName	LastName	Suffix	Title	Email
CASPEN001	Ms.	Penelope		Cashier			po@firs

Review the results to formulate the new unique code including numbers. In our example for Penny Cash, the unique code should be CASPEN002.

D2. Adding a Person

Before adding a Person, you must search for him/her three different ways using advanced filtering.

1. If necessary, access the order (from the third column of the report)
2. If necessary, access the appropriate Contact (from the first column of the report)
3. Double-click the Person's name to edit
4. In the **Lookup code** field, enter the new unique code and press the **Tab** key

NOTE: Cannot exceed 10 characters; refer to the formatting section on page 1.

5. Review the Person's information (fix any spelling/formatting errors)
6. Click the **Lookup code** link

7. Click the **Insert Entry** button

NOTE: the entry is not visible yet.

LookupCode	CourtesyTitle	FirstName	MiddleName	LastName	Suffix	Title	Email
BANROB001	Ms.	Robin		Banks			robin.b.
MOOLE5001	Mr.	Les		Moore			les.mo.

Until saved, entries added to or modified in lookup tables appear in bold text at the bottom of the list

8. Click the **Save** icon

Before save: entries added or modified in lookup tables appear in **bold** text.

LookupCode	CourtesyTitle	FirstName	MiddleName	LastName	Suffix	Title	Email
BANROB001	Ms.	Robin		Banks			robin.b.
MOOLE5001	Mr.	Les		Moore			les.mo.
CASPEN002	Ms.	Penny		Cash			penny.

After save: entries added or modified in lookup tables appear in normal text.

LookupCode	CourtesyTitle	FirstName	MiddleName	LastName	Suffix	Title	Email
BANROB001	Ms.	Robin		Banks			robin.b.
MOOLE5001	Mr.	Les		Moore			les.mo.
CASPEN002	Ms.	Penny		Cash			penny..

E1. Updating a Company

If a Company changes its physical address, or you find an incorrect lookup code, you must update the Company's entry in the lookup table. In our example, the Company's address has changed from 605 Profit Lane to 405 Profit Lane.

1. Navigate to the Company Contact you wish to update
2. Click the **Lookup code** link
3. Search (or filter) to locate the Company
4. In the lookup table grid, update the appropriate cells

LookupCode	Name	PayeeName	Address1	Address2	City	State
FLIS605	Flip This House Realty		605 Profit Lane		Santa Ana	CA
FOCR4011	Focus Real Estate	Focus ...	4011 Alvis Court, Ste 3		Rockdin	CA

In our example, both the street address and the numerical portion of the lookup code are updated.

LookupCode	Name	PayeeName	Address1	Address2	City	State
FLIS405	Flip This House Rea...		405 Profit Lane		Santa Ana	CA
FOCR4011	Focus Real Estate	Focus ...	4011 Alvis Court, Ste 3		Rockdin	CA

5. Click the **Save** icon
6. Double-click the entry to select it

E2. Reassigning a Person from One Company to Another

If a Person is already associated with one Company, you can move that Person to be associated with another Company. This process keeps the Person's unique lookup code, while reassigning him/her to the new Company. In our example, Penelope Cashier previously worked at First Ever Savings and Loan, but now works at Bank of America.

1. From the new Company Contact screen, navigate to the People lookup table
2. Click the **Show Filter** icon
3. Click the **Remove** button to search **ALL** People associated with that Contact Type
4. Search (or filter) to locate, then highlight the Person
5. Horizontally scroll over to view the **Filter: LookupCode** column

You may need to move the lookup table window over so you can view the current Company's Lookup code. Here both codes are visible.

Lender

Lookup code: **BANS123**

Name: Bank of America

Payee name: Bank of America

Address: 123 Broad St

City/State/Zip: Sacramento CA 95826

Phone: Fax:

Email address:

Funding address: 123 Broad St

Add Person to Bank of America

Lookup Table - C - Order Contact - Person - FL.Training

Filter: Filter: LookupCode Equals BANS123

Filter: LookupCode	LookupCodeMain
BROR4800	
MORR4800	MORR4800
ALLR4800	
FIRR4800	
SECR4800	

6. In the **Filter: LookupCode** cell, delete the Person's previous Company code
7. Enter the Person's new Company code

The entry in the lookup table appears in bold text indicating it has been modified.

8. Click the **Save** icon

E3. Removing a Duplicate Company

If a single Company has more than one entry in the lookup table, or when two separate Companies/Contact types (e.g., a Lender and a Real Estate Agent) share the same lookup code, you can remove the duplicate company. **When removing a duplicate Company, you must first reassign any associated People to correct/preferred Company.**

In our example, a Real Estate Agent has a duplicate entry (both old and new lookup code formats).

LookupCode	Name	PayeeName	Address1	Address2	City
ABAS16870	Abacus Properties, Inc.		16870 West Barnarado Dr., ...		San Di...
ABCC7144	ABC Realty & Mortgag...		7144 Fair Oaks Blvd., Suite 2		Carmi...
AbdC001	Abdallah Real Estate	Abdallah Real ...	6929 Sunrise Blvd Ste 150		Citrus ...
ABDC6929	Abdallah Real Estate		6929 Sunrise Blvd., Suite 150		Citrus ...
ABDS1006	Abdallah Real Estate		1006 4th St Fourth Floor		Sacra...
ACaL001	A Capella Realty	A Capella Realty	9696 Junewood Lane		Loomis

1. Navigate to the duplicate Company Contact you wish to remove
2. Determine if there are any associated People with that Company

- a) Click the **Add Person** icon
- b) Click the **Lookup code** link

3. Reassign each associated Person, to the correct/preferred Company (refer to the steps in the prior section *Reassigning a Person from One Company to Another*)

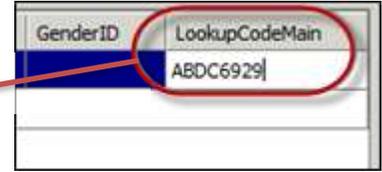
LookupCode	FirstName	MiddleName	LastName	Filter: LookupCode
NESVLA001	Vlad		Nesterenko	AbdC001

LookupCode	FirstName	MiddleName	LastName	Filter: LookupCode
NESVLA001	Vlad		Nesterenko	ABDC6929

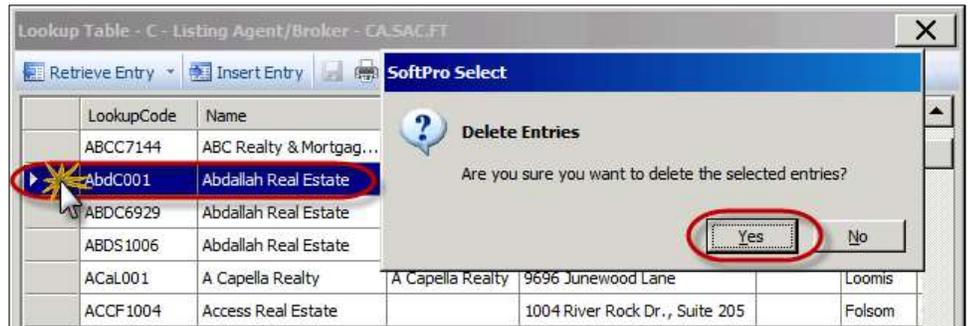
Adding/Updating Contacts

NOTES:

- > For Operations using the **LookupCodeMain**, remember to change that too.
- > If you are not sure if a Person is associated with the correct/preferred Company, **do not** reassign him/her. Leave the Person as is. The next time that Person is needed, the user will follow the search rules and update the Person.



4. Back on the duplicate Company Contact's screen click the **Lookup code** link
5. Click the grey row header (far left) to highlight the entire row
6. Press the **Delete** key
7. In the **Delete Entries** window, click the **Yes** button



NOTES:

- > If you enter identical data for **all** fields into a lookup table, the **Duplicate entry error** pop-up window appears.
- > If you attempt to insert an entry that has the same key field (**Lookup code**) as another entry, the **Duplicate key field value** pop-up window appears.



- > **All** fields are identical
- > Click the **OK** button
- > This entry already exists; no need to save



- > Another entry exists with the same key field (**Lookup code**)
- > Click the **Cancel** button
- > Determine if you need to update an existing entry, or try a different code