

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 the corresponding Lookup Table to safeguard against duplicating existing Companies/People.

This job aid contains the following sections:

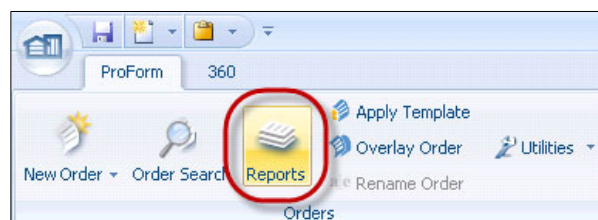
- A. Running and Interpreting the Lookup Table Report, Page 1
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A. Running and Interpreting the Lookup Table Report

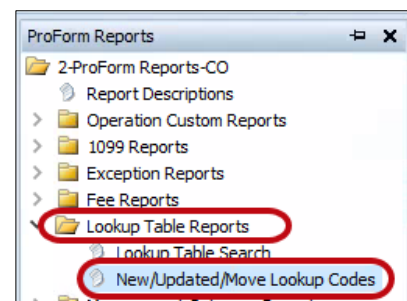
Those who have permissions to edit lookup tables are responsible for periodically running a report to identify new and updated Contacts. Using the information in the report, you will add/update the appropriate lookup tables.

Running the Report

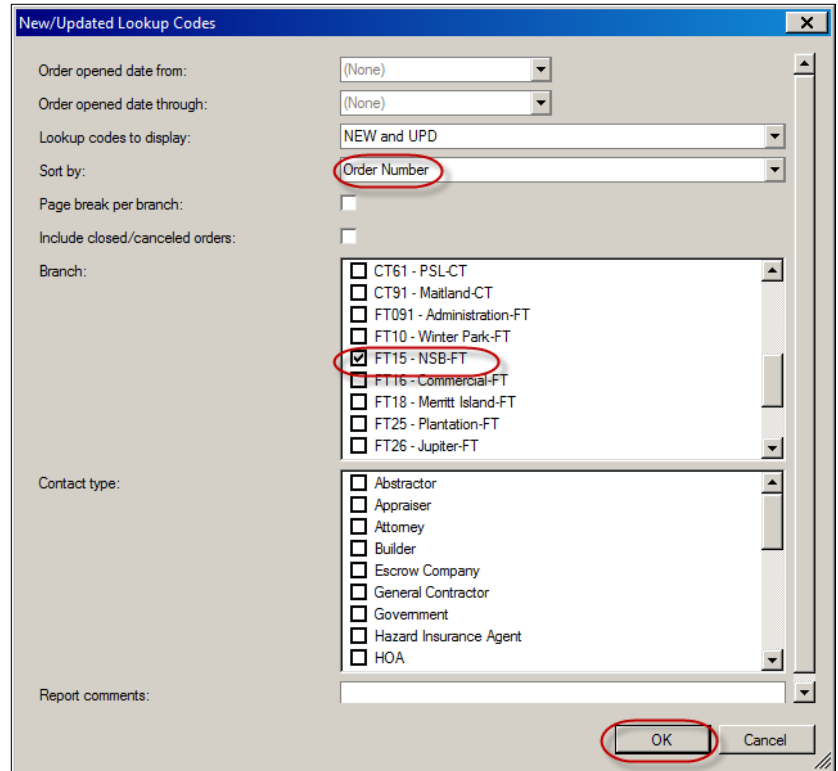
1. Click the **Reports** button



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**



The dialog box 'New/Updated Lookup Codes' contains the following fields and options:

- Order opened date from: (None)
- Order opened date through: (None)
- Lookup codes to display: NEW and UPD
- Sort by: **Order Number** (circled in red)
- Page break per branch: ☐
- Include closed/canceled orders: ☐
- Branch:
 - ☐ CT61 - PSL-CT
 - ☐ CT91 - Maitland-CT
 - ☐ FT091 - Administration-FT
 - ☐ FT10 - Winter Park-FT
 - ☒ **FT15 - NSB-FT** (circled in red)
 - ☐ FT16 - Commercial-FT
 - ☐ FT18 - Merritt Island-FT
 - ☐ FT25 - Plantation-FT
 - ☐ FT26 - Jupiter-FT
- Contact type:
 - ☐ Abstractor
 - ☐ Appraiser
 - ☐ Attorney
 - ☐ Builder
 - ☐ Escrow Company
 - ☐ General Contractor
 - ☐ Government
 - ☐ Hazard Insurance Agent
 - ☐ HOA
- Report comments: (empty text box)
- Buttons: **OK** (circled in red) and Cancel

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)		
New Contact: Mug a Bug Other 12234 Smith St Aurora, CO 46576		Examiner: Received Date: 10/07/21 04:21 pm Received By: Teri Hess Order Number: 120-XF00577-21 Closer: Julie Hellvig
Existing Contact: Keller Williams Performance Realty Selling Agent/Broker 1191096	New Person: Connie Coordinator 1528 Fortino Blvd. Pueblo, CO 81008	Examiner: Received Date: 10/25/21 06:32 am Received By: Rob Perry Order Number: 120-XF00597-21-Id Closer:
Existing Contact: *Abetter Realty Selling Agent/Broker 1165651	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	Examiner: Received Date: 10/26/21 02:31 pm Received By: Lisa Decker Order Number: 122-XF01457-21 Closer:
Updated Contact: 5 Star Bank Lender 104 South Cascade Ave., Suite 111 Colorado Springs, CO 80903 Phone: 719-475-7827 Fax: 719-475-8884		Examiner: Received Date: 11/12/21 08:14 am Received By: Jessica R. Al-Uffi Order Number: 120-XF01407-21 Closer: Jenn Martin
		Examiner: Received Date: 12/03/21 10:37 am Received By: Dan Heimann

- › If **Existing Company**, then look at second column
- › If **Updated Company**, then notice updated information
- › If **New Company**, make note of new information

- › If **Updated Person**, take note of updated information
- › If **New Person**, then notice new information
- › If **Move Person**, take note of new Company information


- › Note **Order Number** to search in SoftPro
- › Note **Order Number** to search in SoftPro
- › Note **Order Number** to search in SoftPro

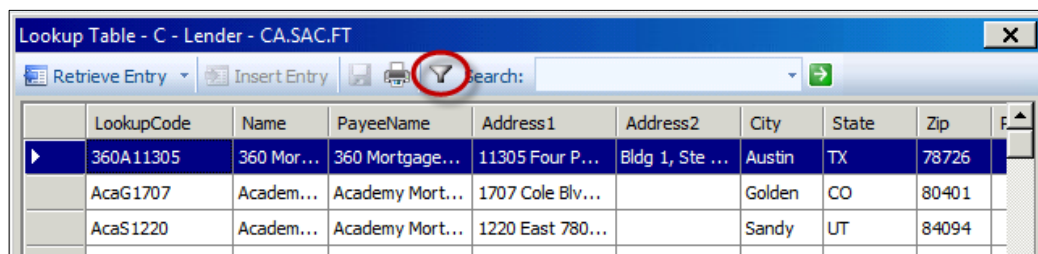
To interpret the report:

1. Look at the new/updated information in the first two columns
2. Determine which Companies/People to add/update
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

B1. Searching for a New Company **Before** Adding

Before adding a Company, you must search for it 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.

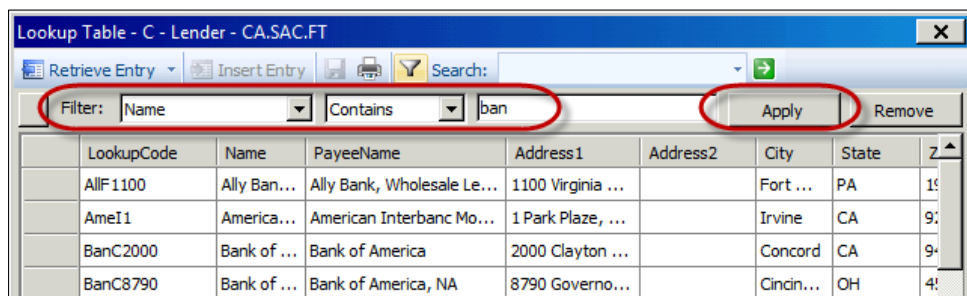
1. Access the appropriate order (from the third column of the report)
2. Access the appropriate Contact Type lookup table (from the first column of the report)
3. Click the **Show Filter**  icon



	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

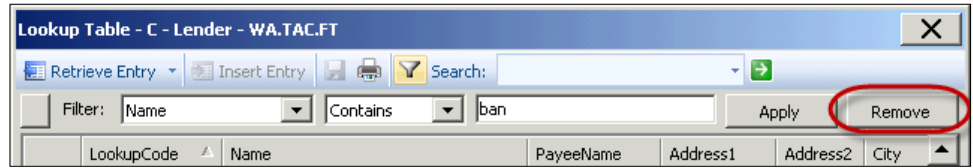
Search Method 1 – Name

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**



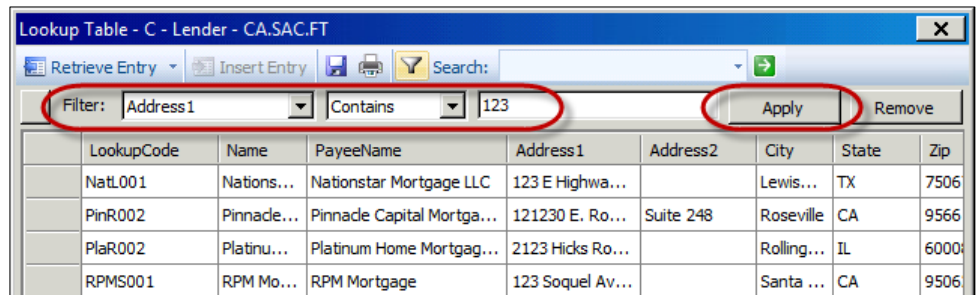
	LookupCode	Name	PayeeName	Address1	Address2	City	State	Zip
	AlIF1100	Ally Ban...	Ally Bank, Wholesale Le...	1100 Virginia ...		Fort ...	PA	15
	AmeI1	America...	American Interbanc Mo...	1 Park Plaze, ...		Irvine	CA	92
	BanC2000	Bank of ...	Bank of America	2000 Clayton ...		Concord	CA	94
	BanC8790	Bank of ...	Bank of America, NA	8790 Governo...		Cincin...	OH	45

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.



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**



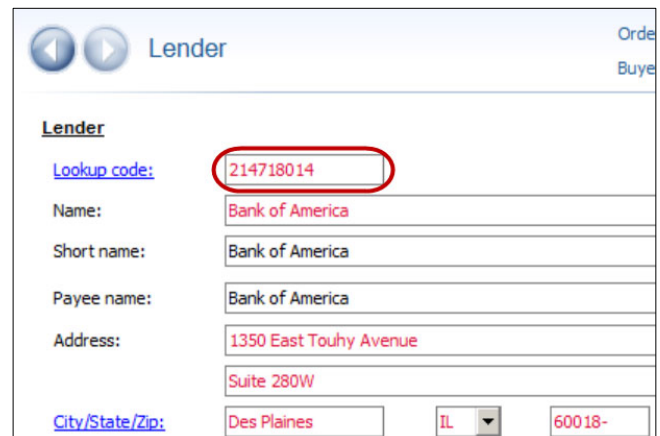
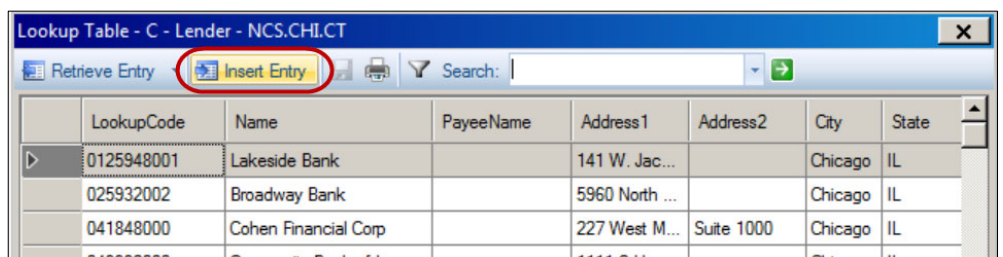
LookupCode	Name	PayeeName	Address1	Address2	City	State	Zip
NatL001	Nations...	Nationstar Mortgage LLC	123 E Highwa...		Lewis...	TX	7506
PinR002	Pinnacle...	Pinnacle Capital Mortga...	121230 E. Ro...	Suite 248	Roseville	CA	9566
PlaR002	Platinu...	Platinum Home Mortgag...	2123 Hicks Ro...		Rolling...	IL	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. If the Company address appears in the list, determine if the entry is a duplicate.

B2. Adding a New Company

Before adding a Company, you must use advanced filter searching for the Company. Once you have the unique account number from Team,

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 (Team account number) 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

LookupCode	Name	PayeeName	Address1	Address2	City	State
0125948001	Lakeside Bank		141 W. Jac...		Chicago	IL
025932002	Broadway Bank		5960 North ...		Chicago	IL
041848000	Cohen Financial Corp		227 West M...	Suite 1000	Chicago	IL
043982000	Community Bank of Law		1111 S. Hom		Chicago	IL

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**.

USBS1	U.S. BANK		1 CALIFOR...		San Fr...	CA
WALB7501	Walker & Dunlop, LLC, a...		7501 Wisco...	Suite 1200E	Bethe...	MD
WELD1445	WELLS FARGO BANK ...		1445 ROSS...	SUITE 4800	Dallas	TX
WELM600	Wells Fargo		600 South 4...		Minne...	MN
214718014	Bank of America		1350 Eas...	Suite 280W	Des ...	IL
Click here to add a row						


7. Click the **Save**  icon

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

WELD1445	WELLS FARGO BANK ...		1445 ROSS...	SUITE 4800	Dallas	TX
WELM600	Wells Fargo		600 South 4...		Minne...	MN
214718014	Bank of America		1350 East T...	Suite 280W	Des Pl...	IL
Click here to add a row						

C1. Searching for a Person **before** Adding

Before adding a Person, you must search for him/her 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 the Company's lookup code appear.

Lookup Table - C - Order Contact - Person - CA 5M.CT							
Retrieve Entry		Insert Entry		Search: <input type="text"/>			
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

Retrieve Entry

Insert Entry

Search:

Filter:

Filter: LookupCode

Equals

CEN999

Apply

Remove

	LookupCode	CourtesyTitle	FirstName	MiddleName	LastName	Suffix	Title	Adc
▶	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		Ferguson			
	Afujimoto		Allison		Fujimoto			
	Agalli		Anthony		Galli			
	Akidwell		Andrew		Kidwell			
	Amerrill		Aida		Merrill			
	Amettler		Andre		Mettler			

Search Method 1 – First Name

1. In the **Filter** drop-down, select **FirstName**
2. In the **Search by** drop-down, select **Contains**
3. In the **Search** field, enter a part of the Person's first name
4. Click **Apply**

Lookup Table - C - Order Contact - Person - WA.TAC.FT

Retrieve Entry

Insert Entry

Search:

Filter:

FirstName

Contains

pen

Apply

Remove

	LookupCode	CourtesyTitle	FirstName	MiddleName	LastName	Suffix	Title	Email
	ABESPE001		Spencer		Abersold			spence.
	ATEOPEN001		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 **Reassigning a Person from One Company to Another** on page 8.

Search Method 2 – Last Name

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

Lookup Table - C - Order Contact - Person - WA.TAC.FT

Retrieve Entry

Insert Entry

Search:

Filter: LastName

Contains

cas

Apply

Remove

	LookupCode	CourtesyTitle	FirstName	MiddleName	LastName	Suffix	Title	Em
▶	ACASLAU001		Lauren		Cassill			lau
	ACASLAU002		Lauri		Cass			rea
	APUSSIM001		Simona		Puscas			sim
	CASADA001		Adam		Cassie			aca
	CASANNO01		Ann		Casey			anr

If the Person's last name does not appear in the list, click the **Remove** button. If the Person's last name appears in the list, skip to **Reassigning a Person from One Company to Another** on page 8.

C2. Adding a Person

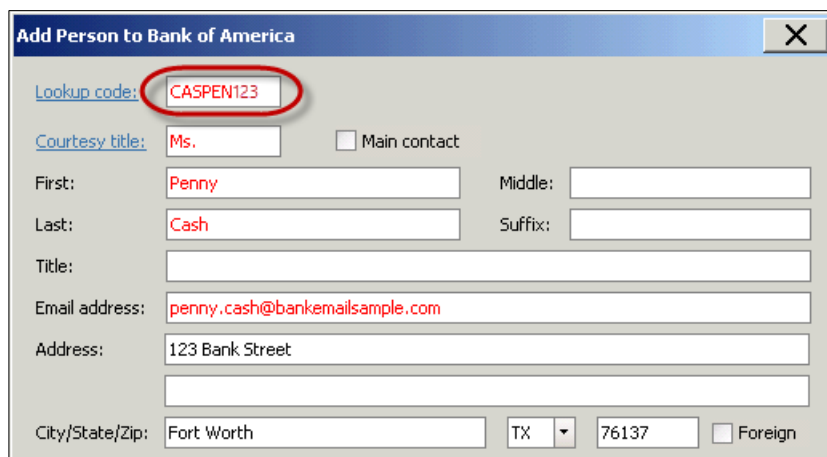
Before adding a Person, you must search for him/her using advanced filtering.

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

REMEMBER: The **Lookup code** is the,

1. First three letters of the last name
2. First three letters of the first name
3. (up to) Four digits of numeric portion of street address

The maximum length **cannot exceed 10 characters**. In our example, **CASPEN123**.



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

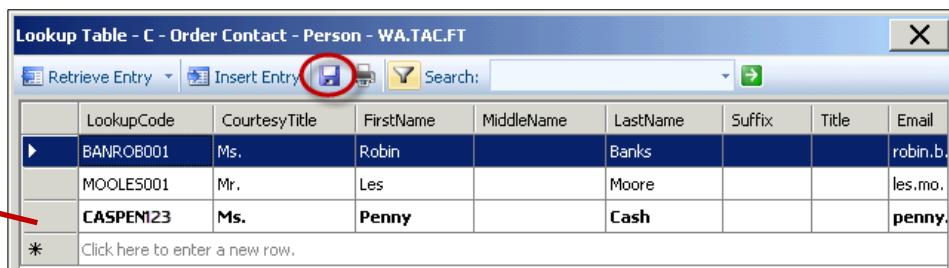


LookupCode	CourtesyTitle	FirstName	MiddleName	LastName	Suffix	Title	Email
BANROB001	Ms.	Robin		Banks			robin.b.
MOOLE5001	Mr.	Les		Moore			les.mo.

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

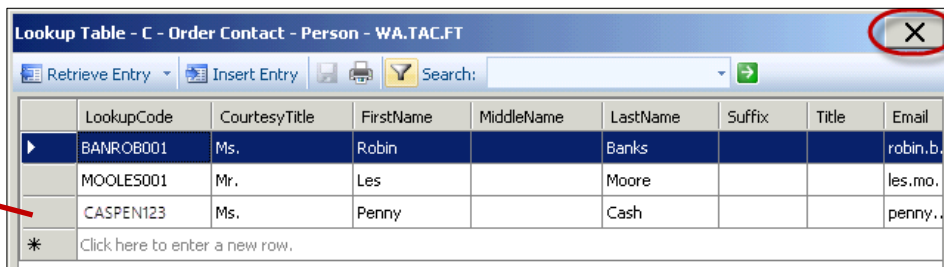
8. Click the **Save**  icon

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.
CASPEN123	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.
CASPEN123	Ms.	Penny		Cash			penny..

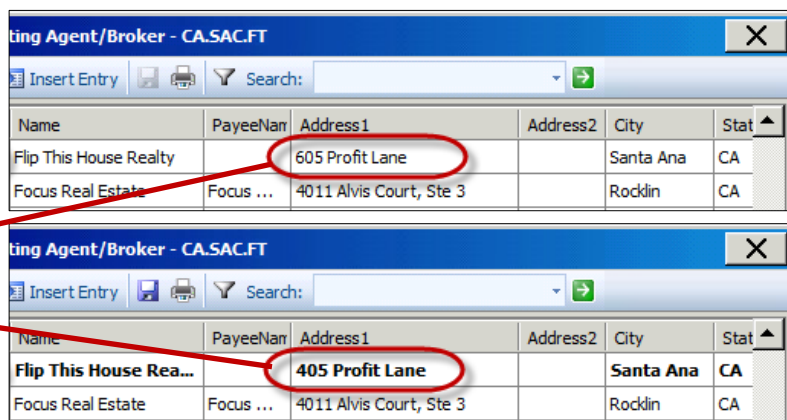
D1. Updating a Company

If a Company changes its physical address, 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

In our example, the street address is updated.

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




Name	PayeeName	Address1	Address2	City	Stat
Flip This House Realty		605 Profit Lane		Santa Ana	CA
Focus Real Estate	Focus ...	4011 Alvis Court, Ste 3		Rocklin	CA

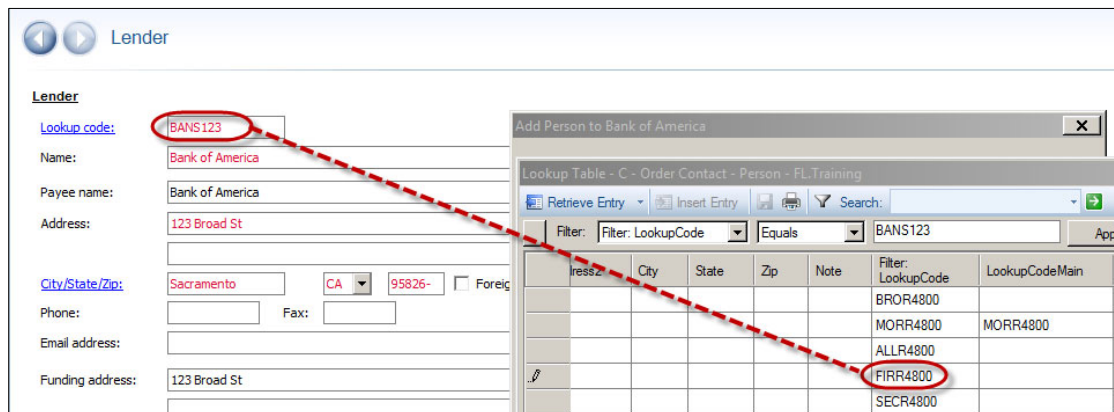
Name	PayeeName	Address1	Address2	City	Stat
Flip This House Rea...		405 Profit Lane		Santa Ana	CA
Focus Real Estate	Focus ...	4011 Alvis Court, Ste 3		Rocklin	CA

D2. 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

Address2	City	State	Zip	Note	Filter: LookupCode	LookupCodeMain
					BROS4800	
					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

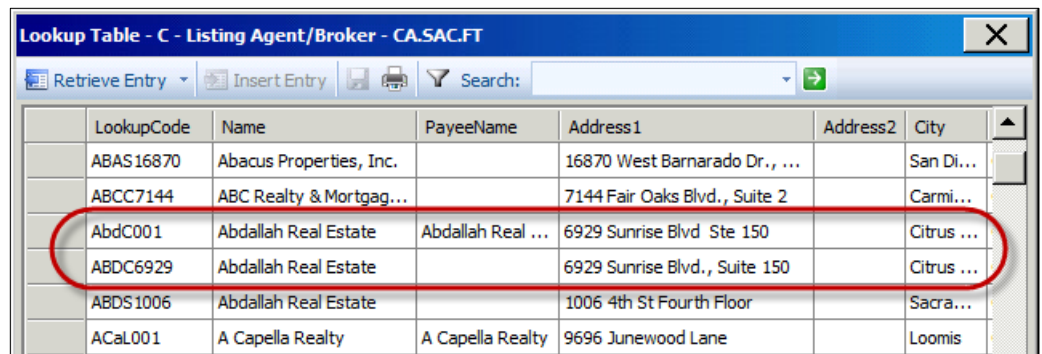
The entry in the lookup table appears in bold text indicating it has been modified.

8. Click the **Save**  icon


D3. Removing a Duplicate Company

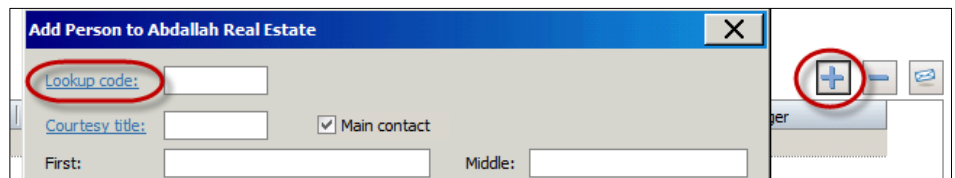
If a single Company has more than one entry in the lookup table, or when two separate Companies/Contact types (e.g. a Lender and a Real Estate Agent) share the same lookup code, you can remove the duplicate company. **When removing a duplicate Company, you must first reassign any associated People to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

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

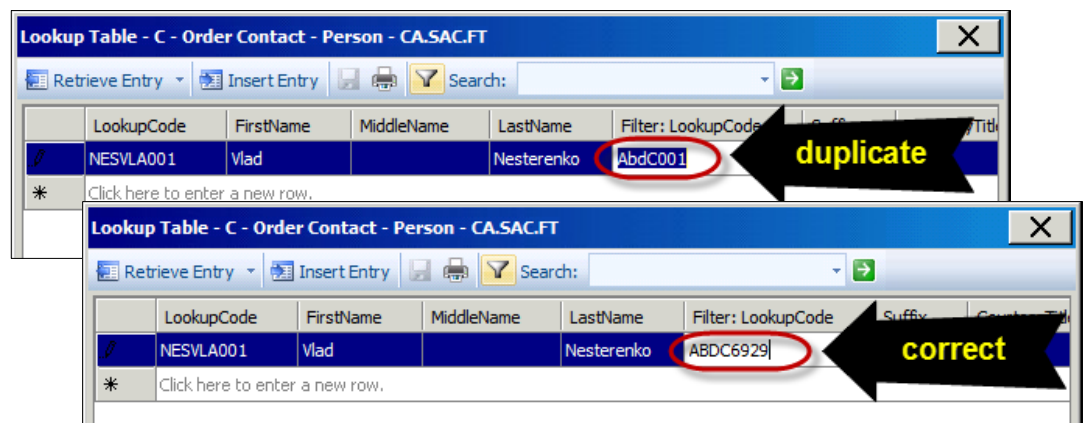


LookupCode	Name	PayeeName	Address1	Address2	City
ABAS16870	Abacus Properties, Inc.		16870 West Barnarado Dr., ...		San Di...
ABCC7144	ABC Realty & Mortgag...		7144 Fair Oaks Blvd., Suite 2		Carmi...
AbdC001	Abdallah Real Estate	Abdallah Real ...	6929 Sunrise Blvd Ste 150		Citrus ...
ABDC6929	Abdallah 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)



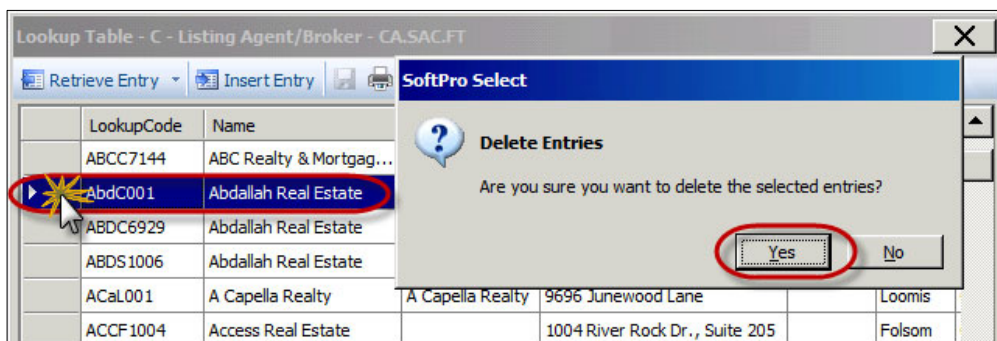
LookupCode	FirstName	MiddleName	LastName	Filter: LookupCode
NESVLA001	Vlad		Nesterenko	AbdC001

duplicate

LookupCode	FirstName	MiddleName	LastName	Filter: LookupCode
NESVLA001	Vlad		Nesterenko	ABDC6929

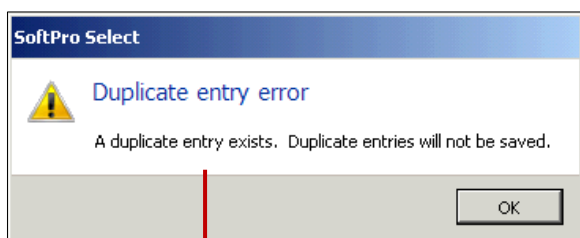
correct

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

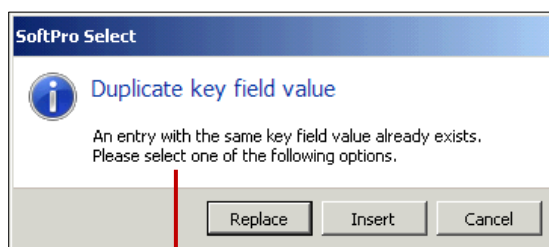


NOTES:

- › 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