
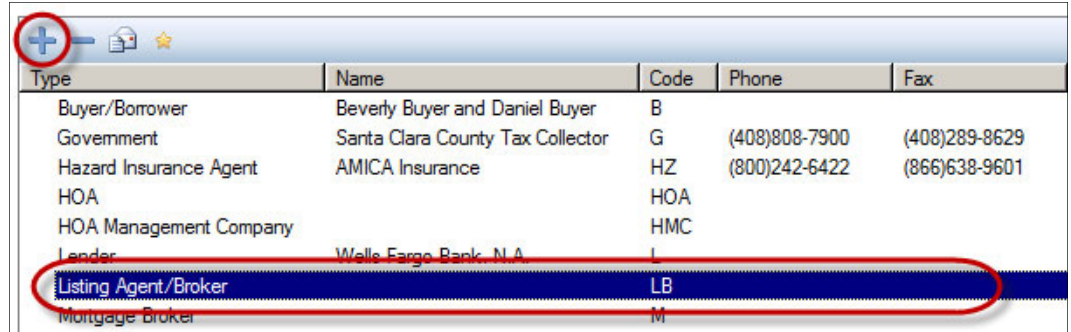


Reverse Searching for a Contact Using a Person

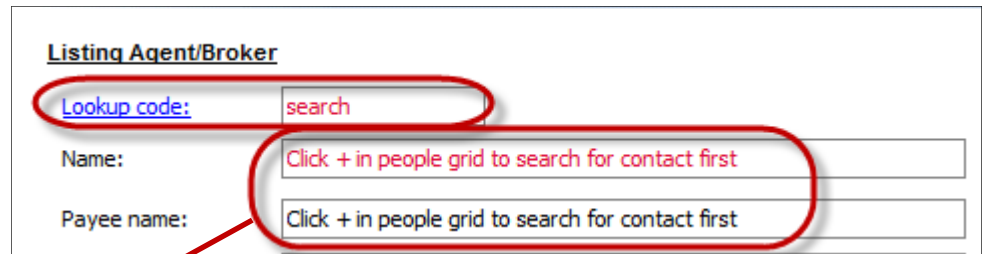
Follow these steps to enter a Contact by searching for the Person first.

1. From the Contact Grid, double-click the appropriate Contact placeholder (or click the **Add Contact**  icon to select the appropriate Contact type)



Type	Name	Code	Phone	Fax
Buyer/Borrower	Beverly Buyer and Daniel Buyer	B		
Government	Santa Clara County Tax Collector	G	(408)808-7900	(408)289-8629
Hazard Insurance Agent	AMICA Insurance	HZ	(800)242-6422	(866)638-9601
HOA		HOA		
HOA Management Company		HMC		
Lender	Wells Fargo Bank, N.A.	L		
Listing Agent/Broker		LB		
Mortgage Broker		M		

2. From the Contacts screen, in the **Lookup code** field, enter the word **search**
3. Press the **Tab** key




Listing Agent/Broker

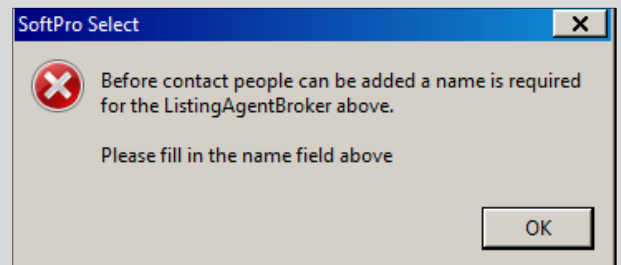
Lookup code: search

Name: Click + in people grid to search for contact first

Payee name: Click + in people grid to search for contact first

You are reminded to click the **Add Person**  icon to search.

NOTE: If you attempt to click the **Add Person**  icon without first entering the word **search**, a message appears reminding you to add a Contact before adding a Person.




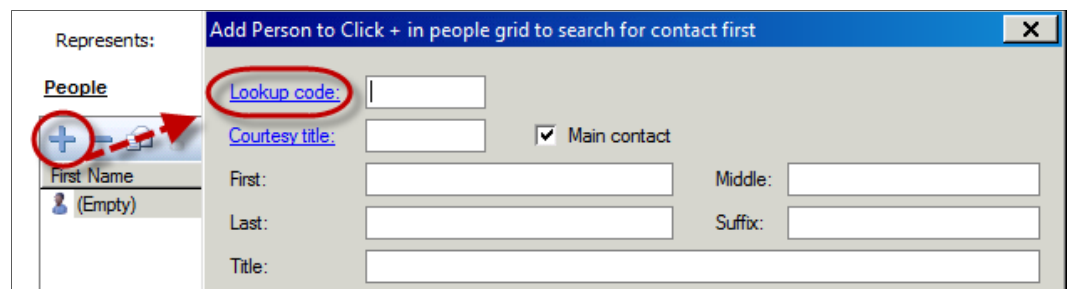
SoftPro Select

Before contact people can be added a name is required for the ListingAgentBroker above.

Please fill in the name field above

OK

4. Click the **Add Person**  icon
5. In the **Add Person** window, click the **Lookup code** link



Add Person to Click + in people grid to search for contact first

People

Lookup code:


Courtesy title: ☒ Main contact

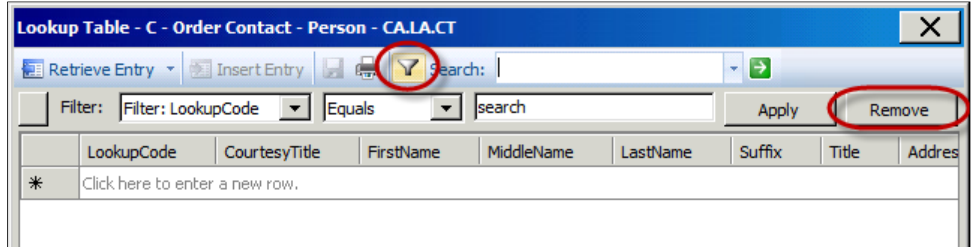
First Name: **Middle:**

Last: **Suffix:**

Title:

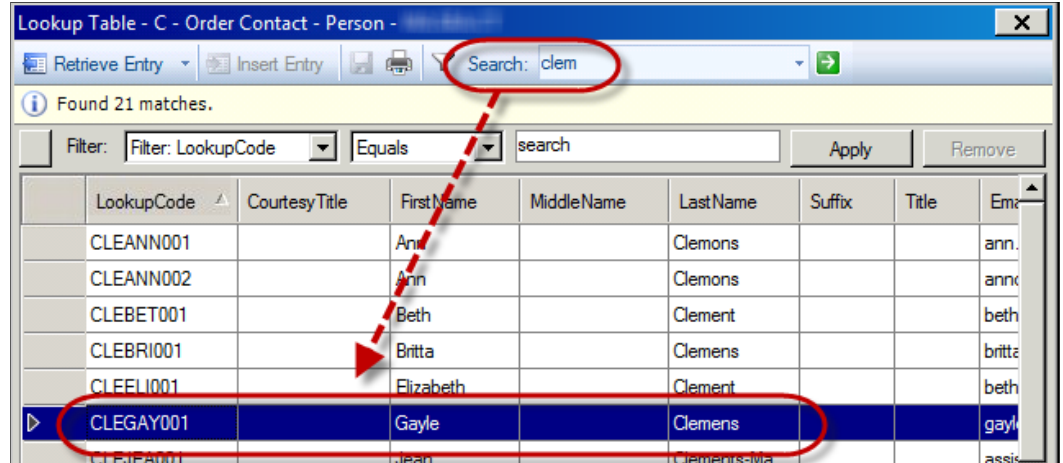
Reverse Searching for a Contact Using a Person

6. Clear the default People filter
 - a) Click the **Filter**  icon
 - b) Click the **Remove** button



You are now looking at **all** People, regardless of Contact Type.

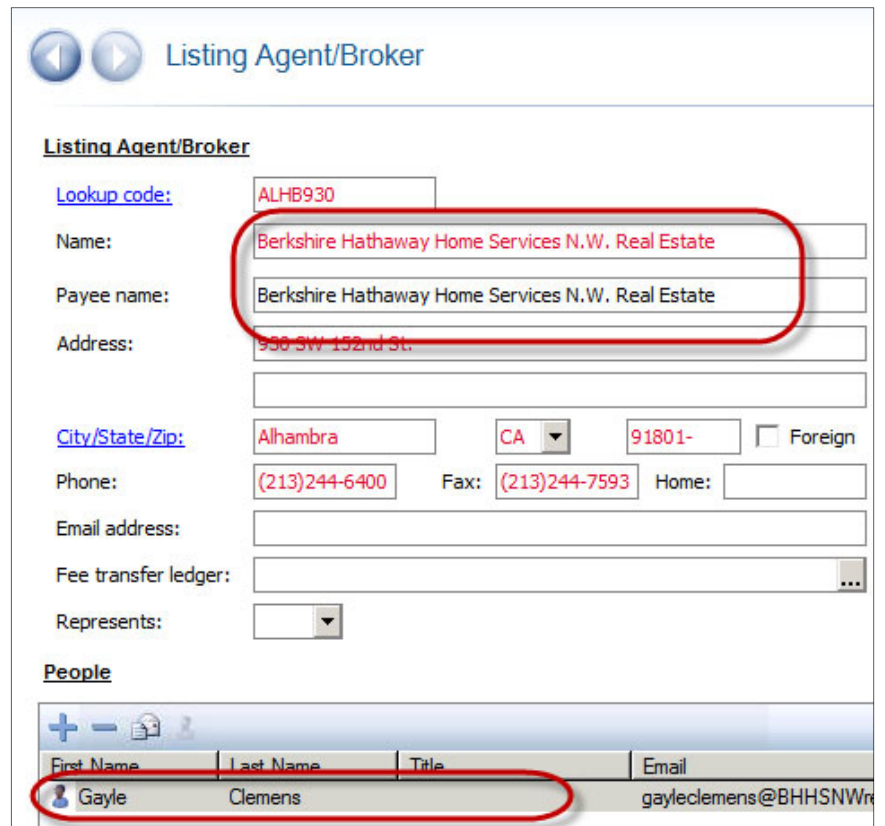
7. In the **Search** field, enter the first few characters of the Person's name
8. Press the **Enter** key
9. Double-click the appropriate person, click the **OK** button



LookupCode	CourtesyTitle	FirstName	MiddleName	LastName	Suffix	Title	Email
CLEANN001		Ann		Clemons			ann...
CLEANN002		Ann		Clemons			ann...
CLEBET001		Beth		Clement			beth...
CLEBRI001		Britta		Clemens			britta...
CLEELI001		Elizabeth		Clement			beth...
CLEGAY001		Gayle		Clemens			gayl...
CLEJPA001		Jean		Clemens-Ma...			assie...

Both the Person and his/her associated Company are added to the order.

10. Press the **Esc** key



Listing Agent/Broker

Lookup code: ALHB930

Name: **Berkshire Hathaway Home Services N.W. Real Estate**

Payee name: Berkshire Hathaway Home Services N.W. Real Estate

Address: 990 SW 152nd St.

City/State/Zip: Alhambra CA 91801- Foreign

Phone: (213)244-6400 Fax: (213)244-7593 Home:

Email address:

Fee transfer ledger:

Represents:

People

First Name	Last Name	Title	Email
Gayle	Clemens		gayleclemens@BHHSNWre

Reverse Searching for a Contact Using a Person

Be careful if you enter the Company first!

In the case where you enter a Company **before** you clear the Person filters, if you select a Person associated with a different Company, the new Company **overwrites** the old one.

Company
entered **before**
Person search

Entering a Person
associated with a
different Company
overwrites the
previously entered
Company

Lender

Lookup code:

Name:

Payee name:

Address:

City/State/Zip: ☐ Foreign

Phone:

**Bank of America
on Wilshire Blvd**

Lender

Lookup code:

Name:

Payee name:

Address:

City/State/Zip: ☐ Foreign

Phone: Fax:

Email address:

Marketing rep.:

Marketing rep.:

Marketing rep.:

Reference #:

Tax ID/SSN:

**Bank of America
on S Lake Ave**

People

First Name	Last Name	Title	Email	Phone
Amy	Adams			(425)