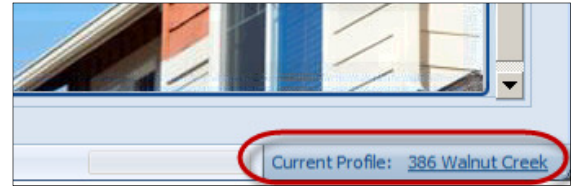


## Title: Assuring Quality for NextAce Orders

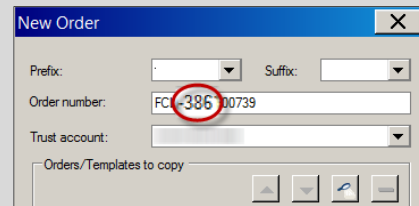
When you receive a SoftPro Select order, follow these steps to access the order and verify all NextAce items have been completed.

### Verifying Your Profile

1. From the **Start Page**, verify the **Current Profile**

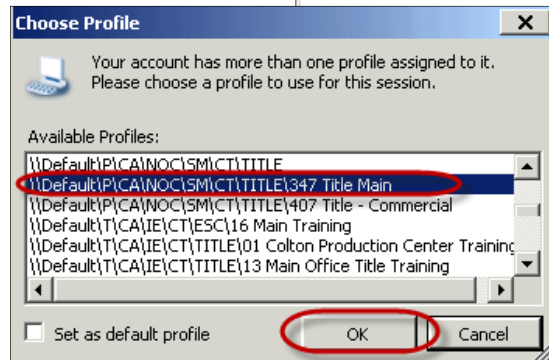
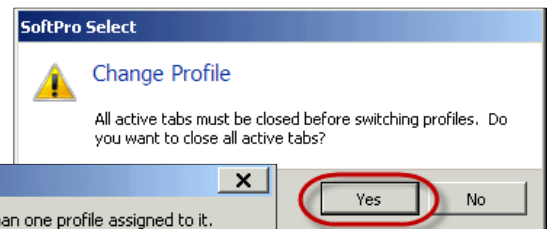


NOTE: In most cases, you can identify the branch using the SoftPro Select order number. For example: FCLA-**386**1500739, the red portion (386) is the branch number.



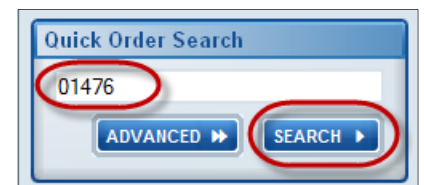
If you are in the correct branch, skip to **Step 6**. If you need to change to the appropriate branch, continue with **Step 2**.

2. Click the **Current Profile** link
3. In the **SoftPro Select** pop-up window, click **Yes**
4. In the **Choose Profile** window, highlight the correct branch
5. Click **OK**



### Searching for the Order

6. From the SoftPro Select **Start Page**, in the **Quick Order Search** field, enter either the beginning or ending portion of the Order number without wildcards
7. Click the **Search** button (or press the **Enter** key)
8. In the **Search Results** pane, double-click to open the appropriate order

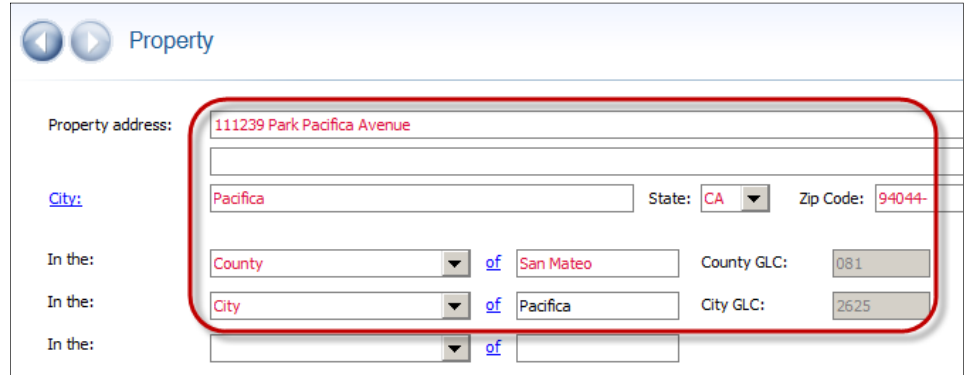


Search Results									
Show results from: <b>ProForm Orders</b>									
Search Results: 5 records found.									
Order Number	Settlement Date	Order Status	Project Name	Address	City	State	Zip	County	Lender
FWTO-3471401476	10/09/2014 07:11 PM	In process	EPRE / MAP color coded	204 Estrella Way	San Mateo	CA	94403	San Mateo	
FWTO-3701201476	08/08/2012 07:48 PM	Closed		271 Oakwood Circle	Martinez	CA	94553	Contra Costa	Interba
FWTO-3701301476	11/19/2013 03:00 AM	Closed		128 Bria Court	Walnut Creek	CA	94597	Contra Costa	Wells Fa
FWTO-3701401476	01/15/2015 12:51 PM	Closed		1239 Park Pacifica Avenue	Pacifica	CA	94044	San Mateo	RMR Fir

## Title: Assuring Quality for NextAce Orders

### Reviewing Property & Legal

9. Navigate to the **Prelim > Property** screen
10. Verify the property address

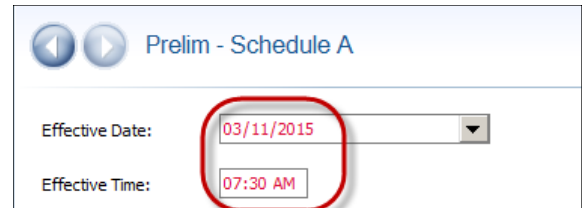
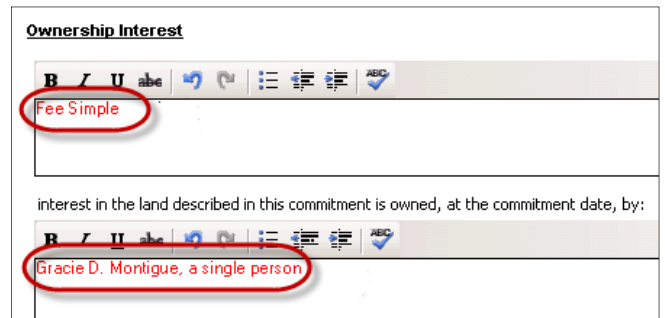


11. In the **Preliminary Opinion/Commitment Legal** field, verify the legal description

NOTE: To see an expanded view of the field, click anywhere in the legal field and press the **Ctrl + E** keyboard shortcut to open the **Scrollable Field Editor**.

### Reviewing Schedules A & B

12. Navigate to the **Prelim – Schedule A** screen
13. Verify the **Effective Date** is the plant date, if necessary correct it
14. Verify the **Ownership Interest** being insured, if necessary correct it
15. Verify the **Vesting**, if necessary correct it

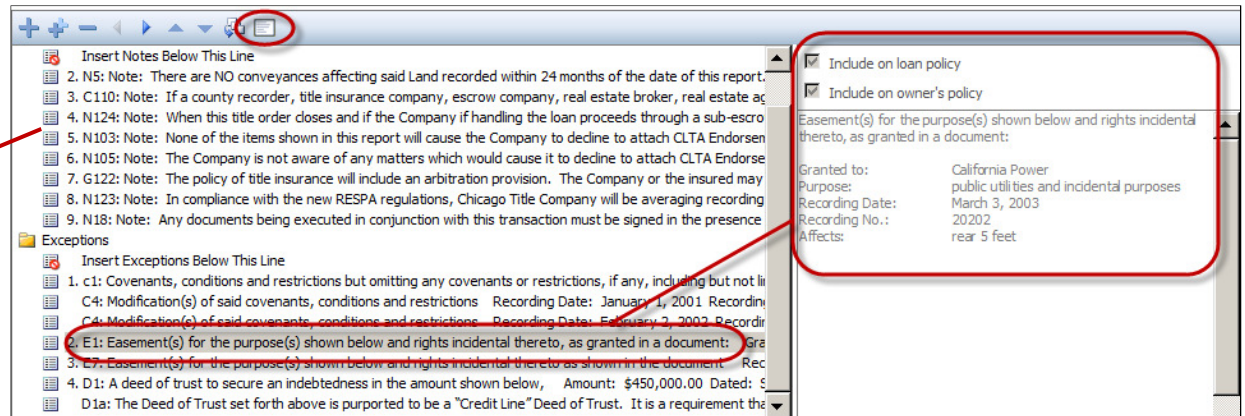



16. Navigate to the **Prelim – Schedules B (Exceptions/Notes)** screen

## Title: Assuring Quality for NextAce Orders

17. Click the **Preview Pane** icon, verify the Exceptions/Notes imported from NextAce by highlighting each item to view the text

Requirements  
are Notes



### Working with Schedule B Items

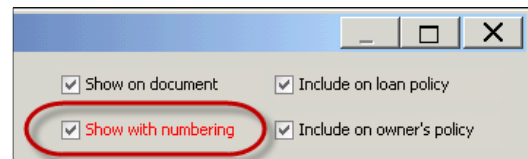
Based on code, most items are correctly numbered/un-numbered (subordinate). However, you can number or un-number (subordinate) items, as well as edit, move, or increase/decrease the indent of items as needed.

#### Editing/Correcting an Item

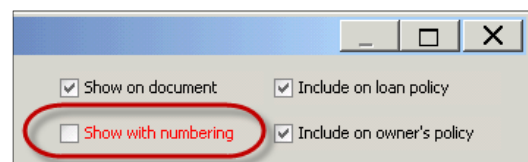
- a) Double-click the item
- b) Edit the text
- c) Click the **OK** button

#### Adding/Removing Item Numbering

- a) Double-click the item
- b) Check or uncheck the **Show with numbering** check box
  - › Checked = show as a numbered item



- › Unchecked = show as an un-numbered (subordinate) item



#### Moving an Item

- a) Highlight the item
- b) Click the appropriate arrow icon to move up or down



#### Increasing/Decreasing the Indent of an Item

- a) Highlight the item
- b) Click the appropriate arrow icon to move left or right



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### Adding an Item

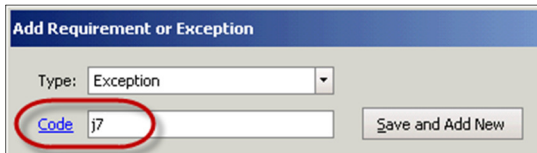
- a) Highlight the last item in the grid (or highlight the item above where you wish to insert the item)

#### Single Item (at a time)

- b) Click the **Add Requirement or Exception** icon



- c) Click the **Code** link to search



NOTE: if you already know the code, enter it, press the **Tab** key, skip to **Step E**.

- d) Search for the code
- e) Click the **Retrieve Entry** button
- f) Answer prompts as they appear
- g) Review the item text, edit if necessary
- h) If necessary, to add another item click the **Save and Add New** button (repeat **Steps c - g** until all items are added)
- i) Click the **OK** button to return to the grid

NOTE: When answering prompts, the code for which you are being prompted appears at the top of the window.

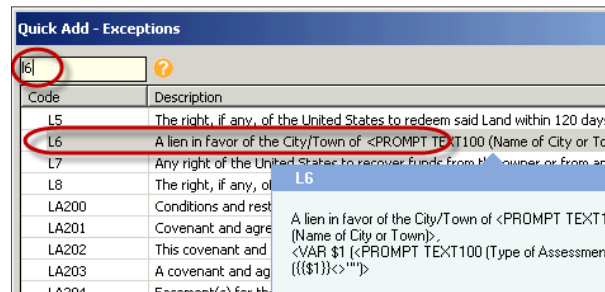
#### Multiple Items (at a time)

- b) Click the **Quick Add Requirements or Exceptions** icon



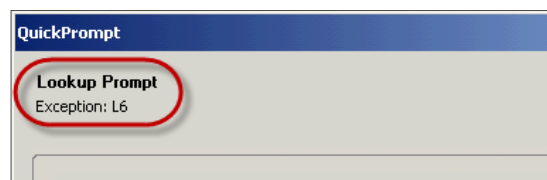
- c) In the **Code Finder** field, start typing a code

As you enter data, the list automatically re-sorts.




Code	Description
L5	The right, if any, of the United States to redeem said Land within 120 days
L6	A lien in favor of the City/Town of <PROMPT TEXT100 (Name of City or Town)>
L7	Any right of the United States to recover funds from the owner or from an
L8	The right, if any, of
LA200	Conditions and rest
LA201	Covenant and agre
LA202	This covenant and
LA203	A covenant and ag
LA204	Facement(c) for the

- d) When the correct item is highlighted, press the **Enter** key
- e) Repeat **Step C** until all items are added
- f) Click the **OK** button
- g) Answer prompts as they appear



### Saving & Exiting the Order

18. If applicable, click **Submit** to advance your Order to the next task in your process
19. Press the **Ctrl + S** keyboard shortcut to save the order
20. Click the **Close**  icon on the **Order** tab to exit the order
21. If applicable, click the **Yes** button to save the changes to the order