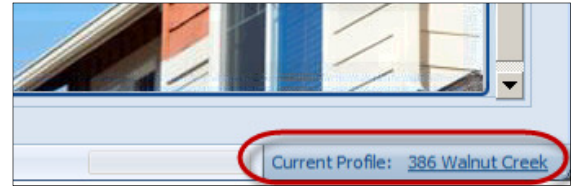# Title: Assuring Quality for NextAce Orders

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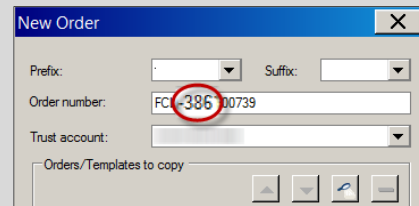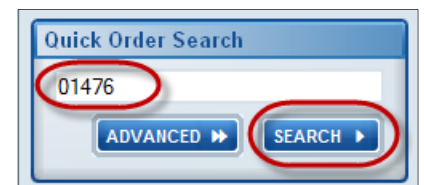
If you are in the correct branch, skip to **Step 6**. If you need to change to the appropriate branch, continue with **Step 2**.

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**
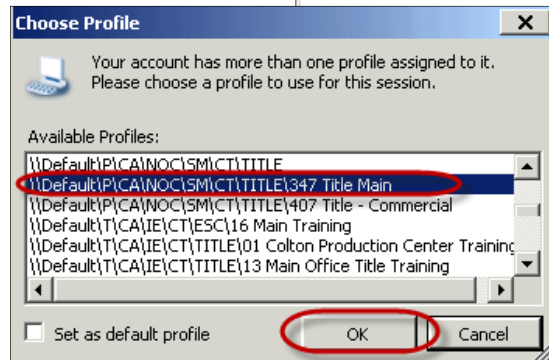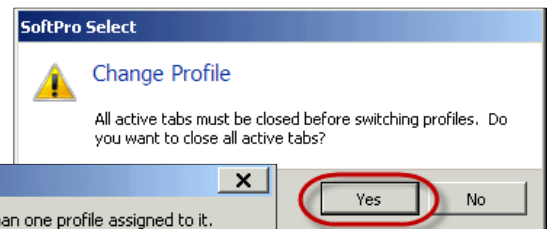
Searching for the Order

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)

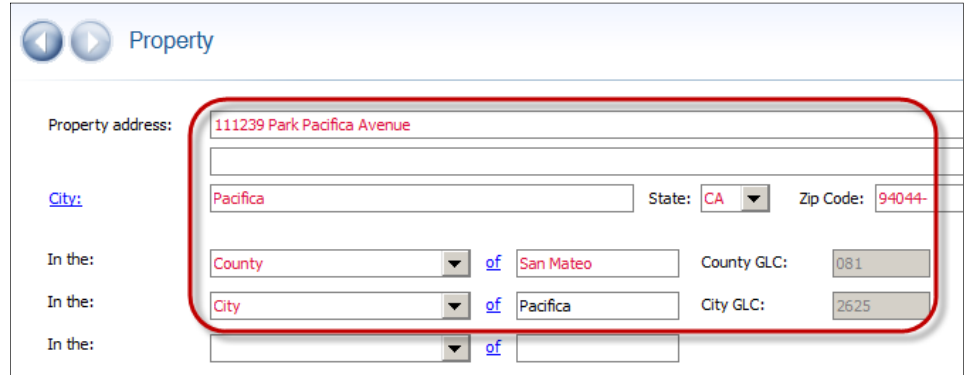8. In the **Search Results** pane, double-click to open the appropriate order

Reviewing Property & Legal

9. Navigate to the **Prelim > Property** screen

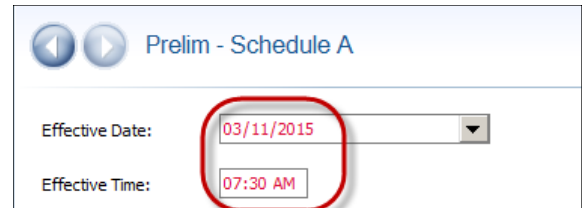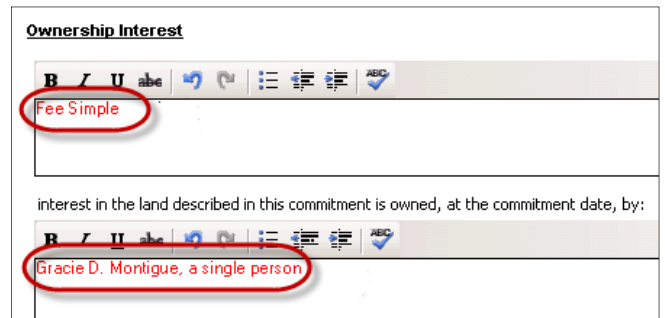10. Verify the property address

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
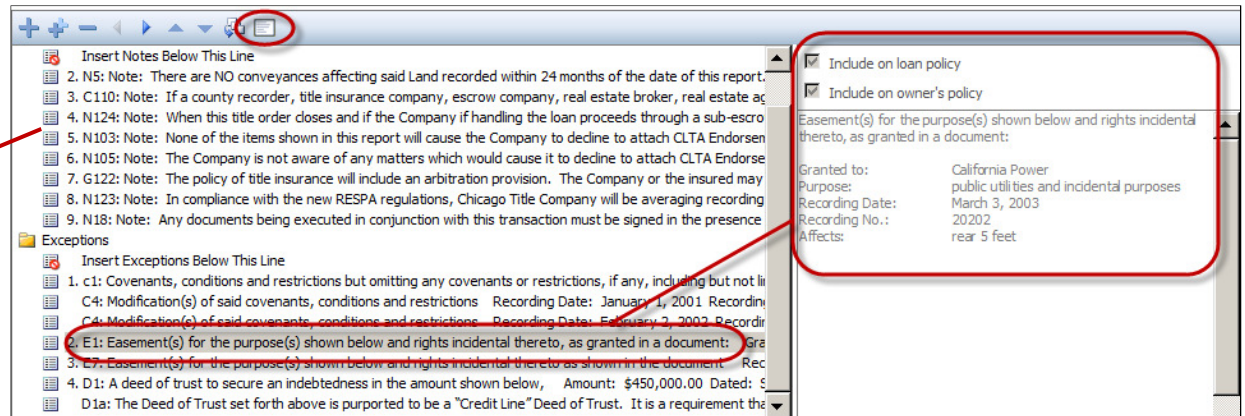
15. Verify the **Vesting**, if necessary correct it

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

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.
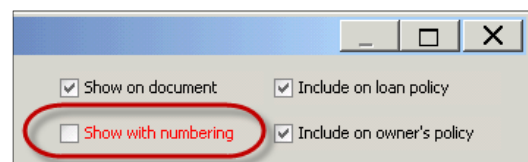
Editing/Correcting an Item

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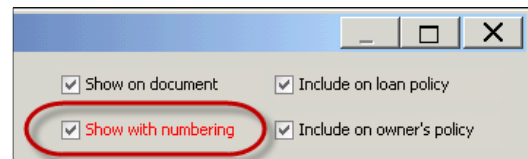
› Unchecked = show as an un-numbered (subordinate) item

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

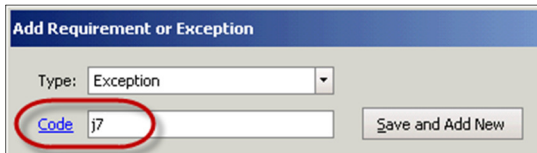# Title: Assuring Quality for NextAce Orders

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.
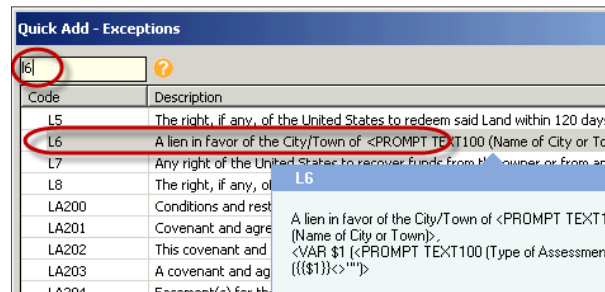
Multiple Items (at a time)

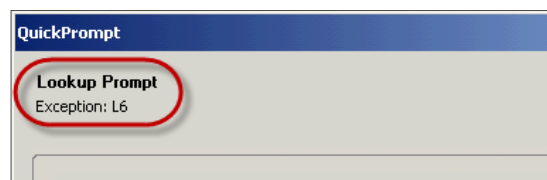   b) Click the **Quick Add Requirements or Exceptions** icon

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

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

    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