Re-Opening an Impact Order in SoftPro Select

When you need to take an existing order in Impact and re-open it in SoftPro Select, use this checklist along with the job aid, **Open Order Checklist – Opening Title & Escrow Orders**, making the following adjustments while completing the items.

> IMPORTANT: Do **not** re-open the following order types:
>
> 〉 Orders that have a 360 transaction
>
> 〉 Orders with checks already cut

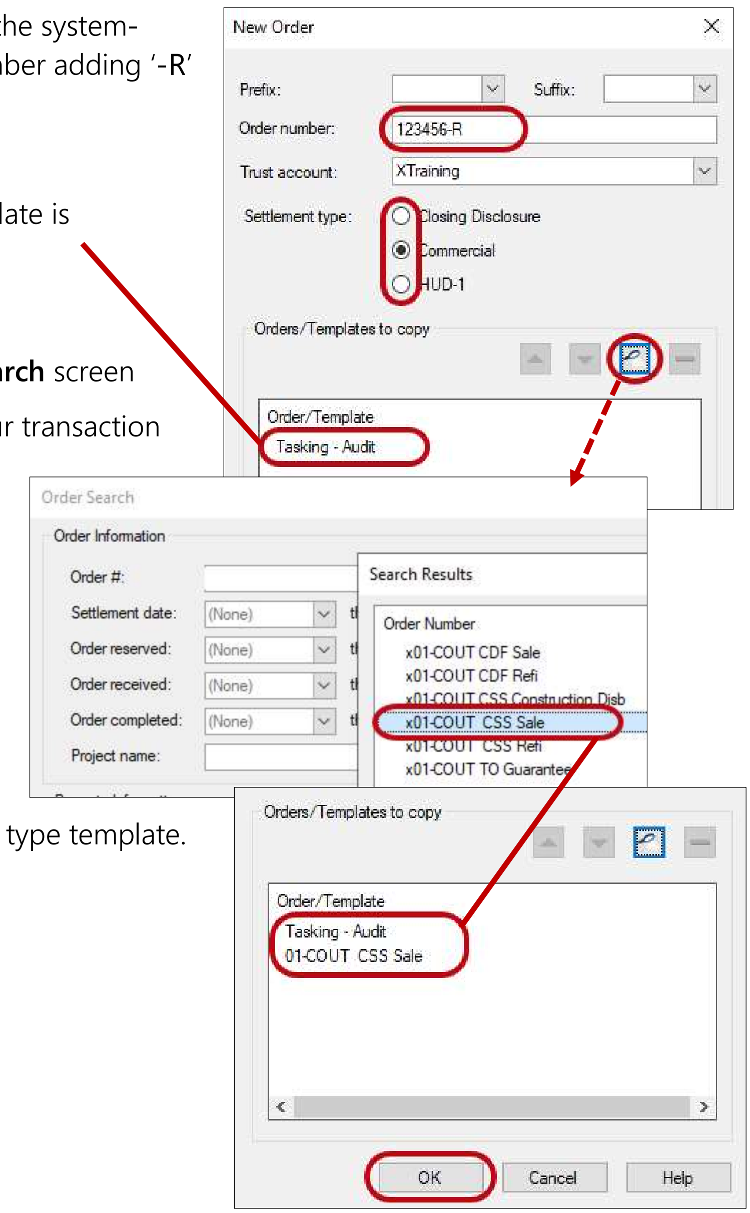
New Order Window

- ❑ In the **Order number** field, highlight and overwrite the system-generated order number with the Impact order number adding '-R' at the end (i.e., 1234567-R)
- ❑ Verify the correct **Settlement type** is selected
- ❑ Apply your template(s) – The **Tasking – Audit** template is automatically shown when the order is opened.

  1. Click the **Search** icon
  2. Press the **Enter** key to bypass the **Order Search** screen
  3. Double-click the applicable template for your transaction **01-COUT** [**CSS/CDF Sale** or **Refi**]; click **OK**

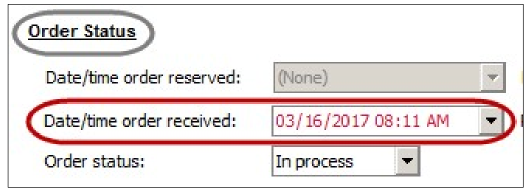
  NOTE: There should be two templates:
  Tasking – Audit and the transaction type template.

  4. Click the **OK** button to generate the order

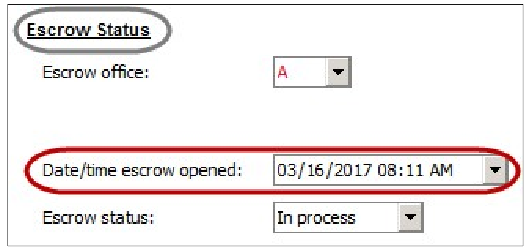


Status Screen

- ❑ Under **Order Status** in the **Date/time order received** field, back date the order to
  - 〉 **date original order was opened**, if opened more than one month prior to today
  - 〉 **date one month prior**, if the order was opened in the current month



This date is then written to the **Escrow Status > Date/time escrow opened** field.



Order Entry Screen

- ❑ Verify **Transaction type**
- ❑ If applicable, check the **Cash sale** check box
- ❑ Continue entering order information as needed (i.e., sale price, loan amount, property, etc.)
- ❑ **Office Speed Codes** – enter the branch speed code (remember to **use the spacebar** to execute); this populates the **A**-, and **T**-Contacts

  NOTE: Click the **Office Speed Code** link to view the list of available codes.

Order Contact Screen

- ❑ Enter Order Contacts as needed
- ❑ **Marketing Source** (source of business) – verify the contact is correctly identified; change if needed
- ❑ Select **Marketing Rep** associated with the marketing source

Document Selection Screen

NOTE: **DO NOT** publish the Open Order Sheet to Smartview

- ❑ **Preview** and send the **Wire Information** to the Lender and/or Buyer(s), etc., as needed

Notes Screen

- ❑ SoftPro Select: enter a note specifying that "*Title work done in Impact*"
- ❑ Impact: enter a note specifying that "*Order re-opened in SoftPro Select for Closing Only*"

IMPORTANT: If all title documents are issued from the Impact order, the following steps for selecting policies and endorsements are done to recognize revenue only.

Title Insurance Premiums Screen

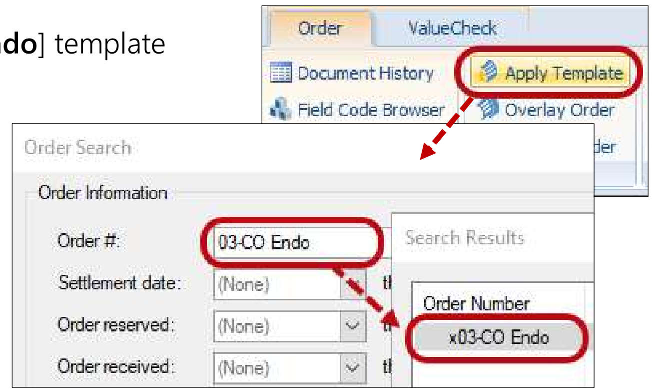
- ❑ From the **Policy code** drop-down, select the applicable policy

Policy Selection Screen

- ❑ Select the policy type using the **Policy lookup code** link; repeat for each policy shown in the grid

Endorsements Screen

- ❑ Add endorsements
    1. Click the **Apply Templates** button
    2. Search for the applicable [**03-CO Endo** or **03-UT Endo**] template
    3. Double-click to select; Click **OK** to apply
    4. Click **OK** to confirm



- ❑ Use the **Add Endorsements** icon to add additional endorsements if needed

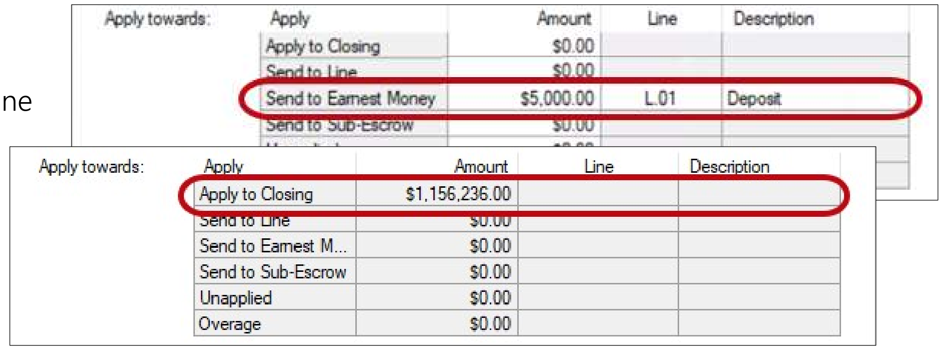
Checklist Tasks Screen

- ❑ **Task – T01. Title Opened/Sent to NextACE** – from **Status** drop-down, select **N/A**
- ❑ **Task – AUD14 Assignment of Contract to New buyer** – from **Status** drop-down, select **N/A**

Handle Impact Fund (if necessary): If you have funds in the Impact order, create separate outgoing wires as follows including the SoftPro Select order number and property address on the outgoing wire forms.

- ❑ Impact order
    1) Create one outgoing wire for the Lender's funds
    2) Create one outgoing wire for the Buyer's funds
- ❑ SoftPro Select order
    1) Lender's funds – WMA auto-posts the incoming wire for Lender's funds as long as the amount in the register matches the incoming wire amount. If the amount does not match, create an **Anticipated Wire** for the Lender's funds.
    2) Buyer's funds – Create an **Anticipated Wire** for the Buyer's funds for WMA to auto-post the matched wire. Once the incoming funds are receipted in the register, adjust the amount on the receipt as needed.
    3) Posted Receipt (incoming wire) – In the **Apply towards** grid, verify and/or move the amount from **Apply to Closing** field to:

- ❑ Buyer's earnest money – send to **Earnest Money** line
- ❑ Funds to close – **Apply to Closing** field



Smartview

- ❑ Copy documents from the smartview Impact order to the new smartview SoftPro Select order; submit a request to smartview Support via ServiceNow if you need assistance

DO NOT CANCEL THE IMPACT ORDER.

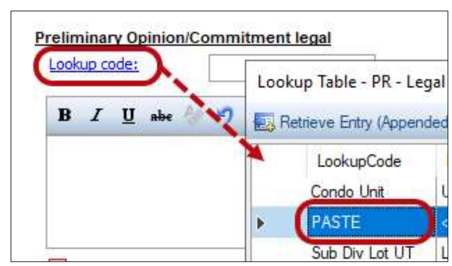
Depending on the timing of when the order is re-opened in SoftPro Select, the policy may be completed in Impact while closing and disbursing is to be completed in SoftPro Select.

NOTE: Follow the below steps if you choose to recreate Title in the SoftPro Select order.

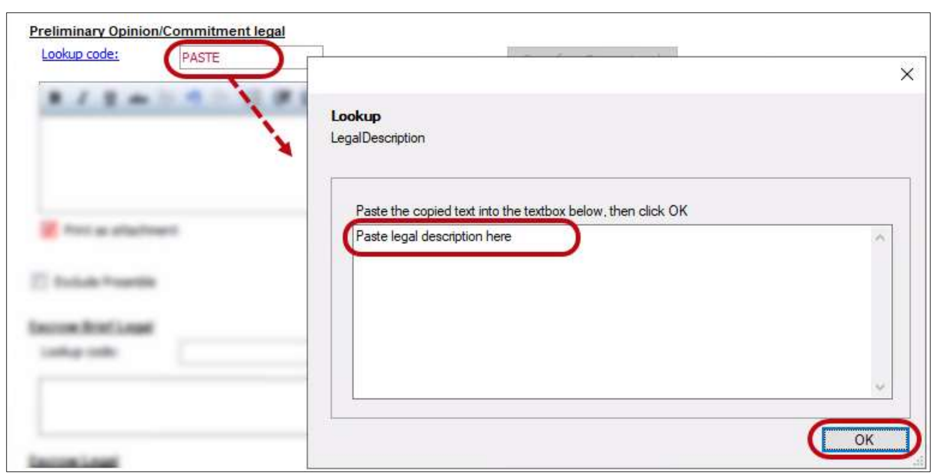
Title Legal Descriptions Screen

- ❑ Enter the **Preliminary Opinion/Commitment legal**

1) Click the **Lookup code** link
2) Double-click the **PASTE** entry to select, this opens the **LegalDescription** dialog box



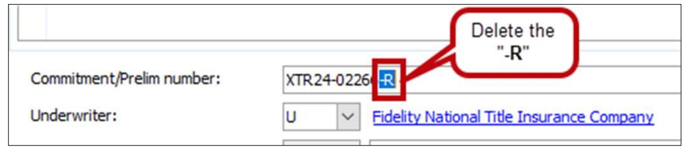
3) From the existing Impact order, copy the legal description and paste into the **LegalDescription** dialog box
4) Click the **OK** button



Commitment – Schedule A Screen

- ❑ Enter information from the Impact order

- ❑ **Commitment/Prelim number** – remove the '**-R**'



NOTE: Once the '**-R**' is removed, the **CTRL + G** function is no longer available to copy the file number.

Commitment – Schedule B1, B2 Screen

- ❑ Delete any items not shown in the Impact order
- ❑ Add additional information from the Impact order

IMPORTANT: If you copy/paste any requirements, notes or exceptions from the Impact order, be sure to select PASTE from the Lookup Table, then paste the information in the text field.

Policy – Schedule A Screen

- ❑ **Policy number** – remove the '**-R**' for the Loan and Owner's policies

NOTE: Contact the OAC with questions on any files where funds have already been receipted in Impact.