

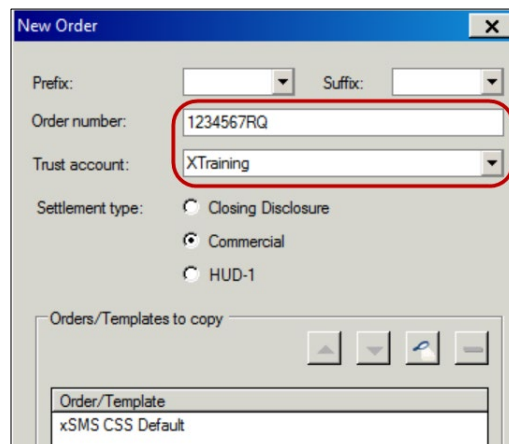
Re-Opening a RamQuest Order in SoftPro Select

When you need to take an existing order in RamQuest and re-open it in SoftPro Select, use this checklist along with the appropriate Open Order checklist making the following adjustments while completing the items.

REMINDER: If you use an Operation-specific Open Order checklist, remember to refer to your Operation's page on the [UserDocumentation](#) website.


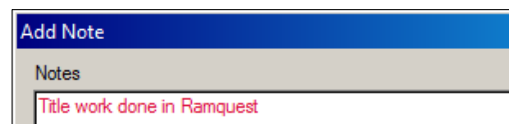
New Order window

- ☐ In the **Order number** field, highlight and overwrite the system-generated order number with the SVO order number from RamQuest followed by the letters 'RQ' (e.g., 1234567RQ)
- ☐ From the **Trust account** drop-down, select the applicable account
- ☐ Click the **OK** button to generate the order



Express Order Entry screen

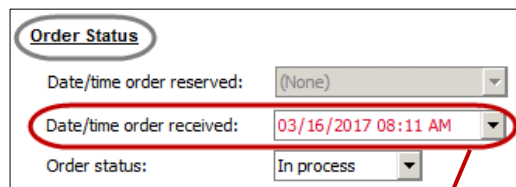
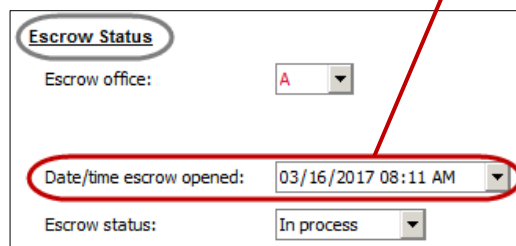
- ☐ In the **Order Type** drop-down, select **Escrow only**
- ☐ Enter an order note specifying that "Title work done in RamQuest."
- ☐ Continue entering order information (i.e., contacts, property, etc.)

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.

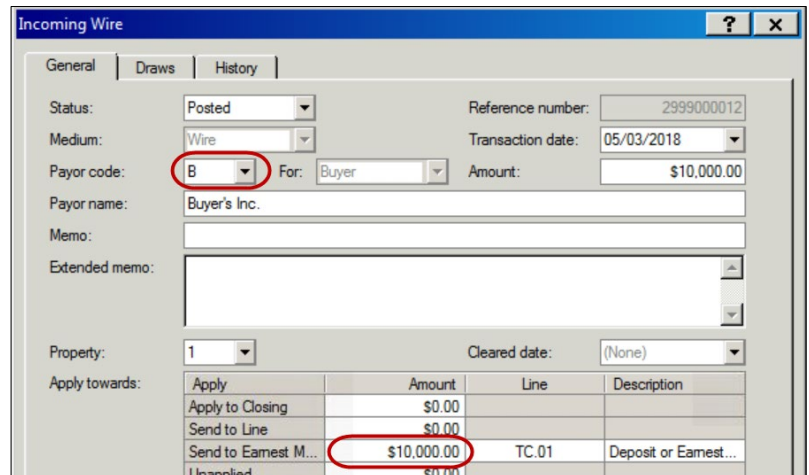
NOTE: After entering all order details, **Do Not** email the order to Title

- ❑ **Handle RamQuest Funds (if necessary):** If you have funds in the RamQuest order, create separate outgoing wires to SoftPro Select. Include the SoftPro Select order number and property address on the outgoing wire forms.
 - a) Create ONE outgoing wire for the Lender's funds
 - b) Create ONE outgoing wire for the Buyer(s)' funds
- ❑ **SoftPro Select Register: Handle Incoming Funds**
 - a) Lender's funds – WMA auto-posts the incoming wire for Lender's funds as long as the amount matches. If the amount does not match, then enter an anticipated wire for the Lender's funds.
 - b) Buyer(s)' funds – you must enter an anticipated wire for Buyer(s)' funds for WMA to auto-post the matched wire.

Once the incoming funds are receipted in the Register, you may have to adjust the amounts on the receipt.

- c) In the **Apply towards** grid verify and/or adjust the amounts for:

- › Buyer(s)' Earnest Money; use individual Buyer code (i.e., **B, B1, B2**, etc.) as the **Payor** and enter on the **Send to Earnest Money** line

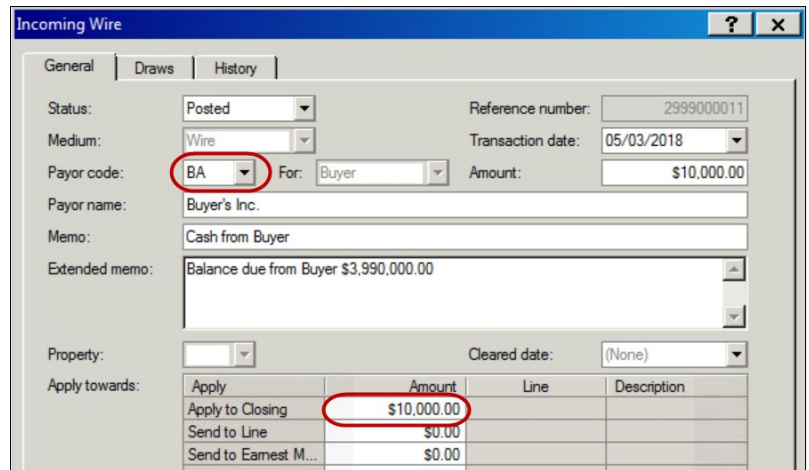


The screenshot shows the 'Incoming Wire' form with the following details:

- Status: Posted
- Medium: Wire
- Payor code: **B** (highlighted)
- For: Buyer
- Amount: \$10,000.00
- Payor name: Buyer's Inc.
- Memo: (empty)
- Extended memo: (empty)
- Property: 1
- Cleared date: (None)
- Apply towards grid:

Apply	Amount	Line	Description
Apply to Closing	\$0.00		
Send to Line	\$0.00		
Send to Earnest M...	\$10,000.00 (highlighted)	TC.01	Deposit or Earnest...
Unapplied	\$0.00		

- › Funds to close; use the **BA** Payor code and enter on the **Apply to Closing** line



The screenshot shows the 'Incoming Wire' form with the following details:

- Status: Posted
- Medium: Wire
- Payor code: **BA** (highlighted)
- For: Buyer
- Amount: \$10,000.00
- Payor name: Buyer's Inc.
- Memo: Cash from Buyer
- Extended memo: Balance due from Buyer \$3,990,000.00
- Property: (empty)
- Cleared date: (None)
- Apply towards grid:

Apply	Amount	Line	Description
Apply to Closing	\$10,000.00 (highlighted)		
Send to Line	\$0.00		
Send to Earnest M...	\$0.00		

COMMERCIAL: RE-OPEN ORDER – NCS SMS

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- ☐ **Document Selection Screen (if necessary):** If the Lender or Buyer(s) have not yet wired funds, send them updated wiring instructions; preview and distribute the **Wire Information/Wiring Instructions** document
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- ☐ **smartview:** Open a ticket with smartview Support via [ServiceNow](#) to have documents moved to the new SoftPro Select smartview file
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- ☐ **Do NOT CANCEL THE RAMQUEST ORDER.** Enter a note in RamQuest specifying that *"File was transferred to Select."*