When you need to take an existing order in ResWare and re-open it in SoftPro Select, use this checklist along with the Open Order checklist to complete the order.

> NOTE: If you have already worked up and distributed the CDF/HUD-1 for review or if you already have funds to close, you may want to finish the order in ResWare instead of re-opening in SoftPro Select.

☐ Before creating the new order, verify the **Current Profile = TitleEscrow**

New Order window

☐ Select **Prefix = R**

☐ In the **Order number** field, highlight and overwrite the system-generated order number with the ResWare order number

☐ From the **Trust account** drop-down, select the account

> NOTE: Refer to the job aid, *Reference Guide – Guide to Selecting the Correct Speed Code / Trust Account* if you are unsure which **Trust account** to select. Make note of the corresponding Speed Code; you will enter it in a later step.
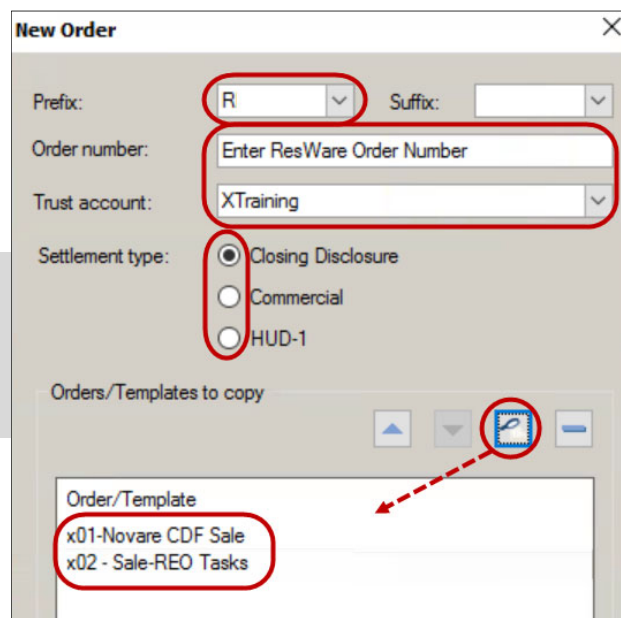
☐ Check the **Settlement type** applicable to your order,

 〉 **Closing Disclosure** = all traditional orders (except Title-only Sub-Escrow orders)

 〉 **Commercial** =Title-only Sub-Escrow

 〉 **HUD-1 =** Reverse mortgage

☐ Apply template

 1. Click the **Search** 🖉 icon

 2. Highlight the applicable **01** transaction template (i.e., Sale, Refi)

 3. Holding the **Shift** key, highlight the applicable **02 Task** template

 Do **NOT** select an,**03-[GA,TX,UT] R&E Resi** template; it is automatically assigned via the automation process for Georgia, Texas or Utah when you exit the order

 4. Click the **OK** button

> NOTE: Refer to the job aid, *Templates – Applying the Correct Template when Opening an Order* if you are unsure which to select.

Order Entry screen

☐ Verify the **Transaction type**

- ❑ Verify **Order type**, if your ResWare order is,
    - » cancelled, open SoftPro order as **Title & Escrow**
    - » not cancelled, open SoftPro order as **Escrow only**
- ❑ **Related order(s)** field, enter the corresponding speed code to populate revenue Contacts (i.e., **A-, A2-, T-**)
- ❑ **Project name** field shows the Contact identified as the Marketing Source; this is the starred Contact

  ⭐ Other (Client)
- ❑ Continue entering order information (i.e., contacts, property, etc.) using the Open Order Checklist for your operation
- ❑ **Notes** – enter a note specifying:
    - » if ResWare order is cancelled, enter *Order re-opened from ResWare*
    - » if ResWare order is not cancelled, enter *Title work completed in ResWare*

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 Status

Date/time order reserved:	(None)
Date/time order received:	03/16/2017 08:11 AM
Order status:	In process

Escrow Status

Escrow office:	A
Date/time escrow opened:	03/16/2017 08:11 AM
Escrow status:	In process

Order Contacts screen

- ❑ Enter all Contacts using placeholders in the grid first; use the **Add Contacts** ➕ icon to add additional Contacts

Checklist Tasks screen

- ❑ Update Tasks to match actions in ResWare order

- ❑ **Save** your order