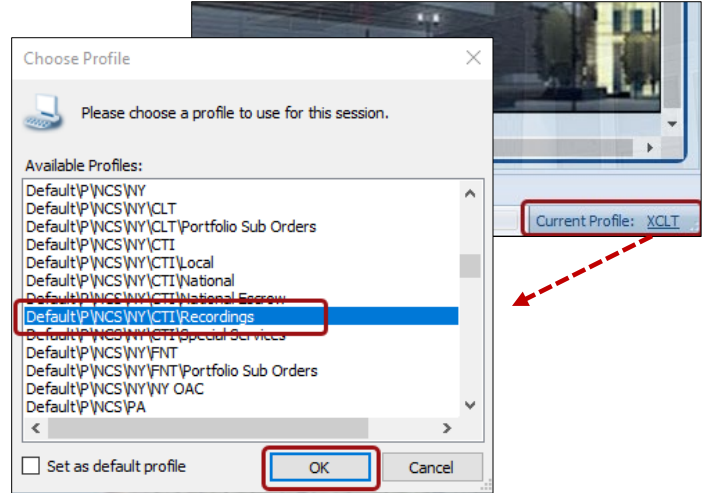



Complete each item to open your SoftPro Select order.

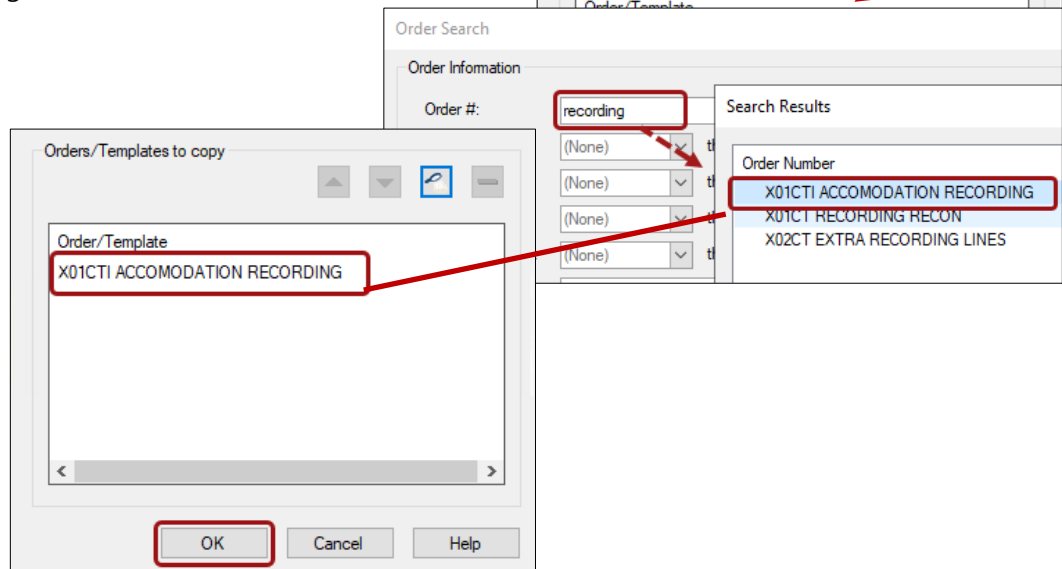
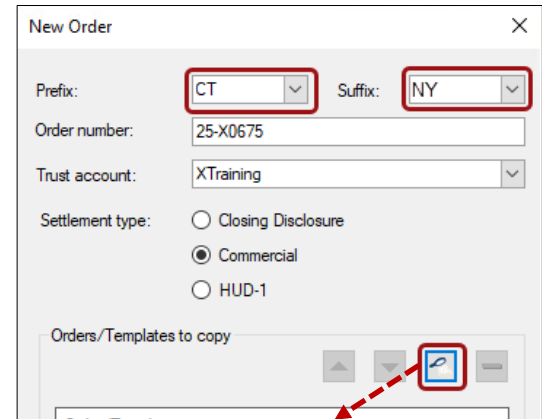
### Start Page

- ❑ Change **Current Profile**
  1. Click the **Current Profile** link (lower right corner); click **Yes** to continue
  2. Select **Default\P\NCS\NY\CTI\Recordings**
  3. Click the **OK** button to return to the **Start Page**



### New Order window

- ❑ Select **Prefix = CT**
- ❑ Select **Suffix**; select **NY** for local
- ❑ Click the **Search**  icon to search for and select your template
  1. In the **Order #** field, enter **recording** to narrow your search
  2. Select the **01CTI Accommodation Recording** template
  3. Click the **OK** button to add the template
- ❑ Click the **OK** button to generate the order



## Escrow Checklist for Accommodation Orders

## Express Order Entry Screen

- ☐ Verify the **Transaction type** = **Other**
- ☐ Verify applicable additional order types are selected (i.e., **Commercial, Construction, Cash sale**, etc.)
- ☐ Verify the **Order type** and **Product type** = **Other**; **Policy type** is blank
- ☐ **Escrow Officer/Closer**; **Pre-closer/Escrow assistant**; **Title officer** leave blank
- ☐ Enter **Property address/City/State/Zip code**; zip code is the minimum required entry to save the order
- ☐ Verify **Property use**
- ☐ Add **Notes** (if applicable)

## Order Contacts Screen

- ☐ **Office Speed Codes** – enter the speed code (remember to **use the spacebar** to execute); this populates the **A-Contacts**
- ☐ Using placeholders first, add all Buyers and Sellers, if applicable
- ☐ **Contacts & Marketing Source**
  - › Using placeholders, enter the Contact who gave you the order,
    - » Check the **Marketing source** check box
    - » Select the **Marketing rep** drop-down, select your specific sales representative

## Documents

- ☐ Print **Order Confirmation (NCS)**
- ☐ Publish to Smartview > Order Engagement folder