COMMERCIAL: OPEN ORDER – TX – NCS CLT DALLAS

Escrow Checklist for Escrow Only (Export) Orders

Complete each item to open your SoftPro Select order.

	New Order window
❑	Verify **Settlement Type** = **Commercial**
❑	Click the **Search** icon to search for and select your template; 〉 In the **Order #** field, enter *EXP* to narrow your search options 〉 From the **Search Results** window double-click **one** template applicable to your transaction 〉 Click the **OK** button to generate the order
	Express Order Entry screen
❑	Verify the **Transaction type**, **Product type**, and **Policy type**; change if needed
❑	From the **Order type** drop-down, select **Escrow only**
❑	**Escrow Officer/Closer; Pre-closer/Escrow assistant**
❑	**Settlement date** (if known)
❑	**Project name** (if applicable)
❑	**Sales price** (if applicable)
❑	**Loan amount** and **Lender** (if applicable)
❑	**Property Address** (**Zip Code** pulls in the **City**, **State**, and **County**)
❑	Complete fields to create your brief legal (if acreage, enter a brief description in **Escrow Brief Legal**)
❑	Select **Property use**
❑	Add **Notes** (if applicable)
	Order Contacts screen
❑	Using placeholders first, add all Buyers and Sellers
❑	Add the **T2**-outside Title Company
❑	**Contacts & Marketing Source** 〉 Using placeholders, add all other Contacts (i.e., Lender, Mortgage Broker and Agents) 〉 When entering the Contact who gave you the order, check the **Marketing source** check box; from the **Marketing rep** drop-down, select your specific sales representative
	Property screen
❑	Enter additional properties (if applicable)
	Register
❑	Receipt in earnest money using the **Add Transaction** icon (if applicable)
❑	Print receipt and **Single Ledger Balance** report
	Documents
❑	Print **Order Summary with Notes**
❑	Publish to smartVIEW
❑	Send appropriate documents to the **T2**-outside Title Company Contact to order the Commitment