
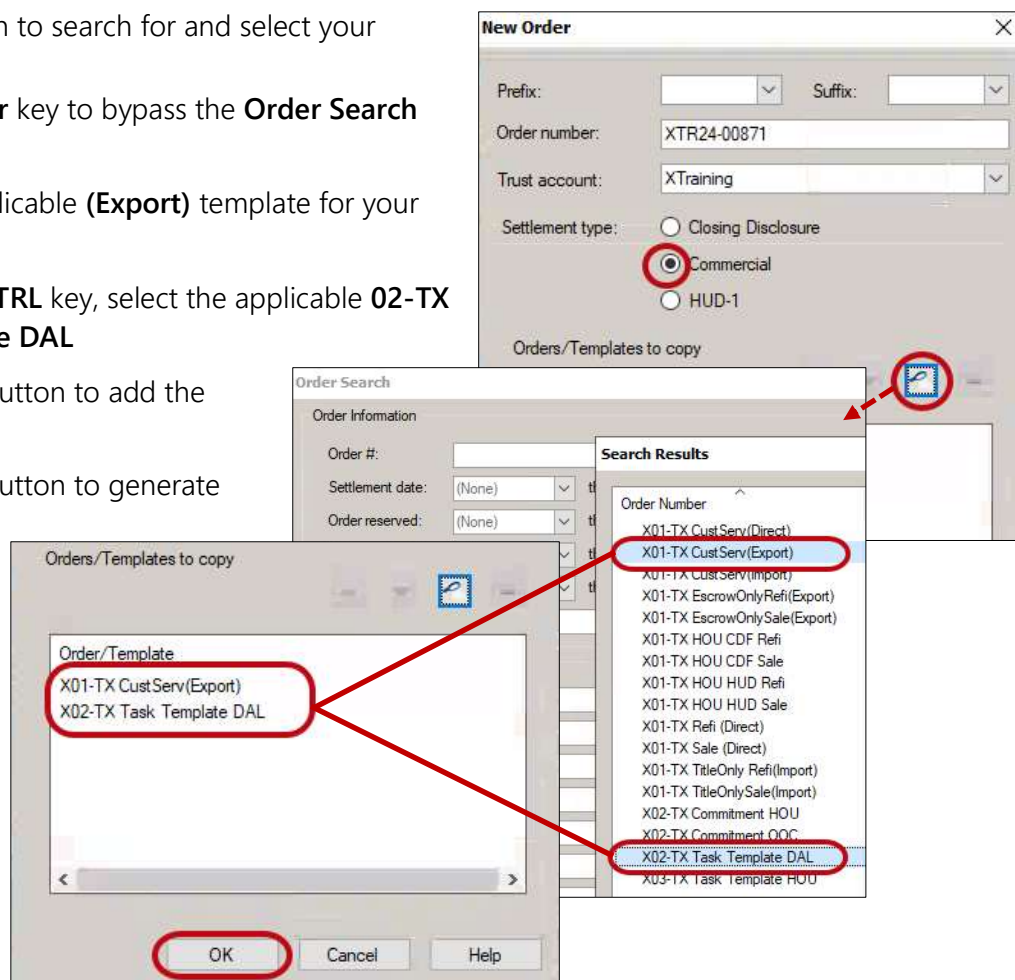


Complete each item to open your SoftPro Select order.

### New Order window

- ☐ Verify **Settlement Type = Commercial**
- ☐ Click the **Search**  icon to search for and select your template
  1. Press the **Enter** key to bypass the **Order Search** window
  2. Select the applicable **(Export)** template for your transaction
  3. Holding the **CTRL** key, select the applicable **02-TX Task Template DAL**
  4. Click the **OK** button to add the templates
  5. Click the **OK** button to generate the order



### Express Order Entry screen

- ☐ Verify the **Transaction type**, **Product type**, and **Policy type**; change if needed
- ☐ **Escrow Officer/Closer**; **Pre-closer/Escrow assistant**
- ☐ **Settlement date** (if known)
- ☐ **Project name** (if applicable)
- ☐ **Sales price** (if applicable)
- ☐ **Principal amount of Loan** 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)

## Escrow Checklist for Escrow Only (Export) Orders


### Order Contacts screen

- ☐ Double-click the **Settlement Agent** Contact to add the Escrow Assistant to the **People** grid using the **Copy from SoftPro user** drop-down
- ☐ 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