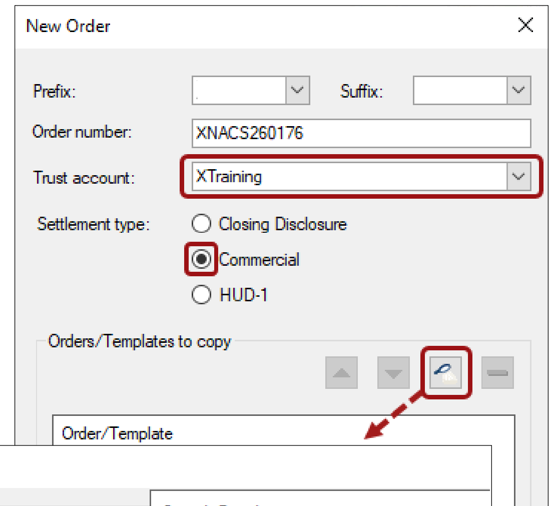
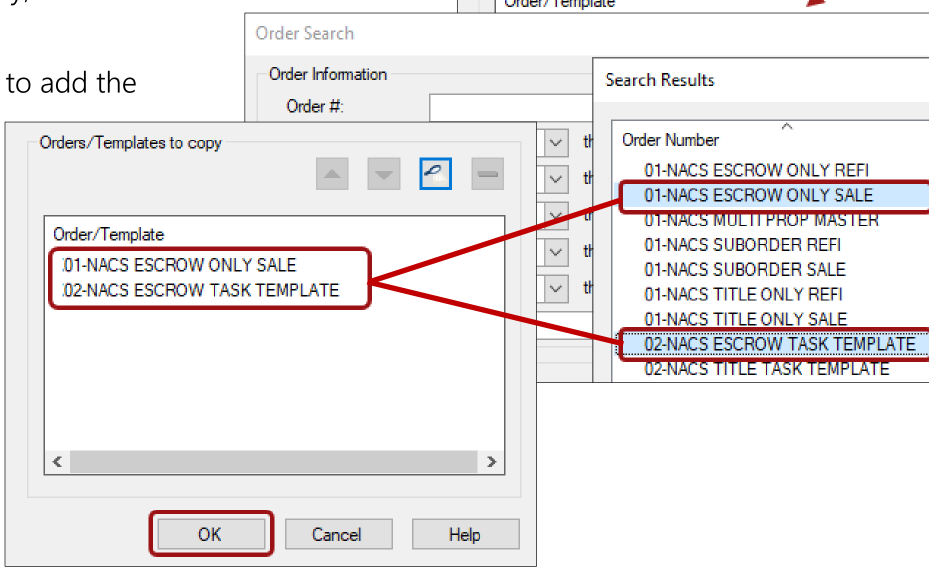
Complete each item to open your SoftPro Select order.

### New Order Window

- ❑ Verify the **Trust account** is populated
- ❑ 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; click the **Order Number** header to sort the templates
    2. Select the applicable **01-NACS ESCROW ONLY [SALE/REFI]** template for your transaction
    3. Holding the **CTRL** key, select the **02-NACS ESCROW TASK TEMPLATE**
    4. Click the **OK** button to add the templates
    5. Click **OK** to generate the order




### Order Entry Screen

- ❑ Verify the **Transaction type**
- ❑ Verify and change if needed,
    - ❑ **Order type**
    - ❑ **Product type**
- ❑ Select **Escrow officer/Closer** (Lead)
- ❑ Select **Pre-closer/Escrow assistant** (Coordinator)
- ❑ Enter **Settlement date** (or an estimated date), if applicable
- ❑ Enter **Project name**, if applicable
- ❑ Click the **Address Validation** button to pull in the property information
    - ❑ Enter Address in corresponding field
    - ❑ Click the **Search** button
    - ❑ Verify address and owner, click **Import**

**NOTE**: Refer to the job aid, [Address Validation Tool – Using the Tool] for detailed information on how to use the tool.

- **Multiple Properties***:* clicking the **Address Validation** button again displays the properties already imported into (existing in) the order; click the **Add New** button to enter the next address to import.
- **Vacant land or acreage**: If the property is vacant land or acreage and you cannot use the Address Validation Tool, enter the property information manually. The following fields are required:
  - ❑ **Property address** or **APN/Parcel ID**
  - ❑ **City -** use the **City** link to pull from the City Lookup Table
  - ❑ **County -** use the **of** link to pull from the County Lookup Table if the city is not known
- **Multiple Owners**: If multiple owners are returned, upon import you are prompted to combine into a single contact.

❑ Add **Notes**, if applicable

## Order Contacts Screen

❑ **Office Speed Codes** – enter the branch speed code (remember to **use the spacebar** to execute)

**NOTE**: This populates the **T-**, and **U-**Contacts for you. Click the **Office Speed Codes** link to view the list of available codes.

❑ Using placeholders first, add all Buyers and Sellers

❑ Add the **T2**-outside Title Company

❑ Add the **Other (Referring Agent)**

❑ **Marketing source**: When entering the contact from the Source of Business, check the **Marketing source** check box

(**Other Referring Agent** OR **T2-Outside Title Company**, as applicable)

## Property Screen

❑ Enter additional properties, if applicable

## Documents Tab

❑ Publish the **Open Order Sheet (Order Summary) with Notes** to Smartview

## Checklist Tasks Screen

❑ **Order Created** Task. set **Status = Completed**