
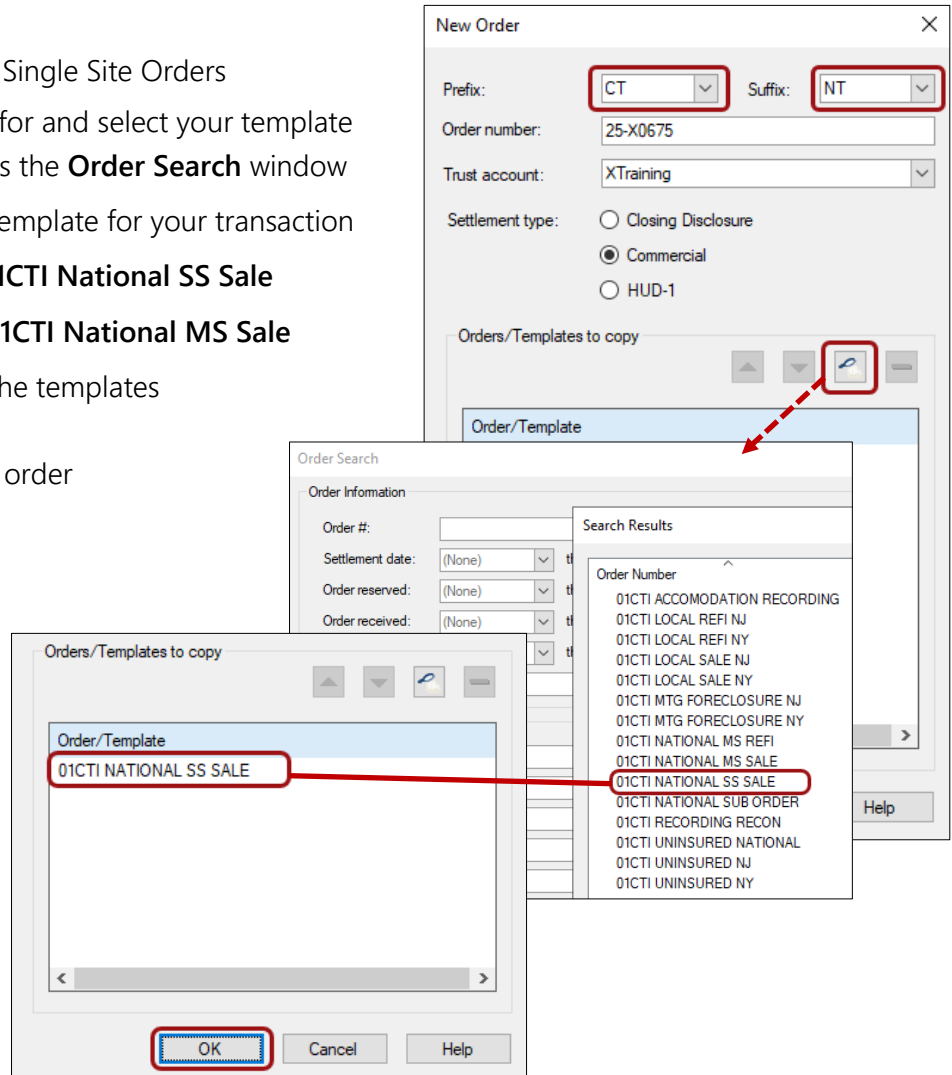


Complete each item to open your SoftPro Select order.

### New Order window

- ☐ Select **Prefix** = CT
- ☐ Select **Suffix**; select **NT** for National Single Site Orders
- ☐ 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 **01CTI** template for your transaction
    - > Single Site – select **01CTI National SS Sale**
    - > Master File – select **01CTI National MS Sale**
  3. Click the **OK** button to add the templates
- ☐ Click the **OK** button to generate the order



The image shows three overlapping windows from the SoftPro Select application:

- New Order window:** The 'Prefix' dropdown is set to 'CT' and the 'Suffix' dropdown is set to 'NT'. The 'Order number' is '25-X0675' and the 'Trust account' is 'XTraining'. Under 'Settlement type', 'Commercial' is selected. The 'Orders/Templates to copy' section has a search icon highlighted with a red box and a red arrow pointing to the 'Order Search' window.
- Order Search window:** The 'Order Information' section is visible. The 'Search Results' list shows various order templates, with '01CTI NATIONAL SS SALE' highlighted by a red box and a red arrow pointing to the 'Orders/Templates to copy' window.
- Orders/Templates to copy window:** The 'Order/Template' list shows '01CTI NATIONAL SS SALE' highlighted by a red box. The 'OK' button is highlighted with a red box.

### Express Order Entry Screen

- ☐ Verify the **Transaction type**; change if needed
- ☐ Verify applicable additional order types are selected (i.e., **Commercial, Construction, Cash sale**, etc.)
- ☐ Verify the **Order type, Product type**; change if needed
- ☐ **Escrow Officer/Closer; Pre-closer/Escrow assistant; Title officer** leave blank
- ☐ **Settlement date** (leave blank if not known)
- ☐ **Project name** (if applicable)
- ☐ **Related order(s)** (if applicable)
- ☐ Update **Sales price**; applied template populates a \$10,000 placeholder

- ☐ Update **Principal amount of Loan**; applied template populates a \$10,000 placeholder
- ☐ 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.

- ☐ 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-**, **T-**, and **U-**Contacts
- ☐ Add **T2-Contact**
- ☐ Using placeholders first, add all Buyers and Sellers
- ☐ **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)

### Policy & Premium Selection Screen

- ☐ **Policies to be Issued:** verify **Policy lookup Code** is shown for each policy in the grid

### Documents

- ☐ Print **CSU Application**
- ☐ Publish to Smartview > Order Engagement folder