Follow these steps to open a new order in SoftPro Select.

Start Page Tab

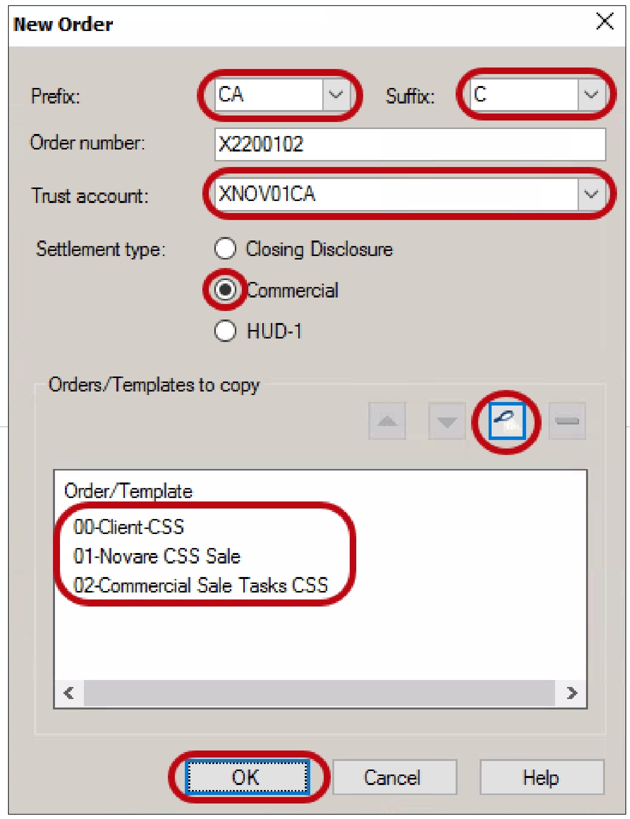
- ❑ **Current Profile = TitleEscrow**

IMPORTANT: Make sure you are in the correct Profile **prior** to opening the Order.

New Order window

- ❑ Select the,
  - ❑ **Prefix** = property state
  - ❑ **Suffix**
  - ❑ **Trust account**: If you are unsure which account to select, refer to the *REFERENCE GUIDE – GUIDE TO SELECTING THE CORRECT SPEED CODE/TRUST ACCOUNT* job aid.
  - ❑ **Settlement type = Commercial**

IMPORTANT: Settlement type **MUST** be changed when opening the order.



- ❑ Select your template(s) using **Search**
  1. Click the **Search** icon
  2. From the **Order Search** window, click the **Search** button
  3. Press/hold the CTRL key to select multiple templates
     a) If adding a client template, highlight the template with a 00- prefix
     b) Highlight the applicable CSS template with a 01- prefix
     c) Highlight the applicable task template with a 02-prefix
     d) Click the OK button
  4. Verify your templates; click OK to generate the order

Order Entry screen

- ❑ If applicable, check the corresponding check box for Commercial, Construction, Cash sale
- ❑ Verify Order type, Product type, Policy type
- ❑ If applicable, Additional Description Field, use the link to select the corresponding selection from the Lookup Table
- ❑ Select Escrow officer/Closer
- ❑ Select Pre-closer/Escrow assistant, if applicable
- ❑ Select Title officer/Examiner; leave blank if an Escrow Only order
- ❑ If sale transaction, enter
  - ❑ Contract Acceptance Date
  - ❑ Due Diligence/Contingency Expiration
  - ❑ Days Until Closing

- ❑ If refinance transaction, enter **Settlement Date**
- ❑ Enter **Property** address, tab over to enter the **Zip code**; this populates the **City**, **State**, **Zip Code**, **County** and **County GLC** fields

IMPORTANT: Property information must be entered **prior to** entering speed code.

- ❑ **Related order(s)** enter the office speed code (remember to **use the Spacebar** to execute the speed code); this auto-fills the **A**- and **T**-Contacts

NOTE: If you are unsure which account to select, refer to the *Reference Guide – Guide to Selecting the Correct Speed Code/Trust Account* job aid.

Order Contacts screen

- ❑ Verify revenue contacts (**A**-, **A2**-, **T**-Contacts) are correct
- ❑ Double-click the **Other (Client)** Contact to verify the,
  - ❑ **Market source** check box is checked
  - ❑ **Marketing rep** is selected
  - ❑ **Reference #** is shown
- ❑ If applicable, double-click the **Other (Commissions)** Contact if paying an internal employee
  1. Click the **Lookup Code** link
  2. Double-click the corresponding employee name to select; notify management if the employee is not found.
- ❑ If applicable, double-click the **Other (Affiliated Sales Rep)** Contact if paying a referral fee to an outside company
  1. Click the **Lookup Code** link
  2. Double-click the applicable entry to select; refer to your operation’s internal master vendor list.
- ❑ Enter all Contacts, using placeholders in the grid first
  - 〉 If a placeholder does not exist (or there are multiple Buyers/Sellers), use the **Add Contacts** icon to add additional Contacts
    - 〉 If available, use the **Lookup code** link to select the Contact from the Lookup Table
    - 〉 If the selected Contact information needs to be changed (i.e., address, phone number, etc); overwrite the **Lookup code** with **UPD** and enter corrected information in the appropriate field(s)
  - 〉 If the Contact does not exist in the Lookup Table, close the table
    - 〉 On the Contact screen, in the **Lookup code** field, enter
      - » **ONE** (unless specified by the Branch); continue entering all avalaible information for the Contact
      - » **NEW**, if the Contact is to be added to the Lookup Table; continue entering all avalaible information for the Contact
- ❑ Add people for an Organization in the **People** grid; use the **Lookup code** link to search/select from the Lookup Table (if available)

NOTE: If you need to add a new person for a Company Contact, use **ONE** or **NEW** as noted above.

	Documents screen
❑	**Publish** the **Open Order Sheet (w/Notes)** to smartview in the Open Order folder
	Checklist Tasks screen
❑	Submit applicable search request (i.e., to title search vendor)
❑	Highlight the corresponding Task in the grid
❑	Select **Completed** from the **Status** drop-down (below the grid)
	Save and Exit
❑	**Save** the Order
❑	Notify the Escrow Closer and/or Escrow Assistant via email the order is opened and provide the order number