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 TITLE ONLY [SALE/REFI]** template for your transaction

  3. Holding the **CTRL** key,

     a. select the **02-NACS TITLE TASK TEMPLATE**

     b. select the applicable **03-NACS COMMITMENT [state]**

  4. Click the **OK** button to add the templates

  5. Click **OK** to generate the order
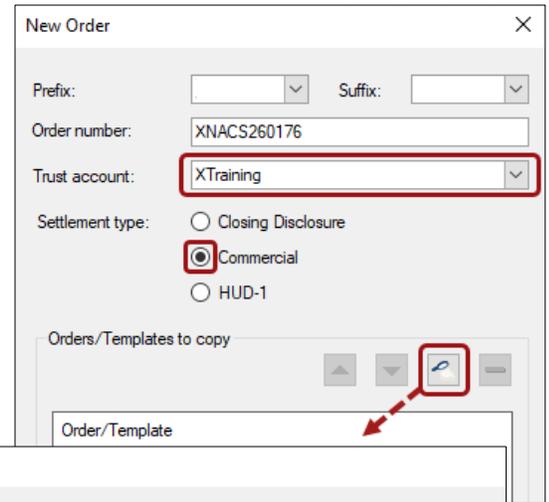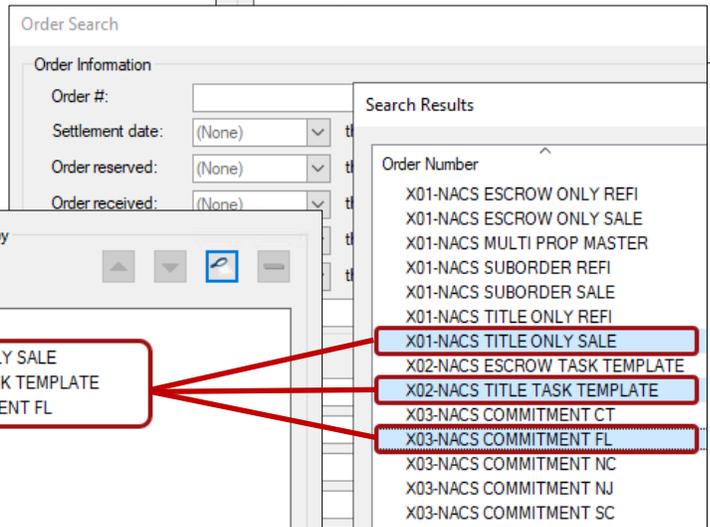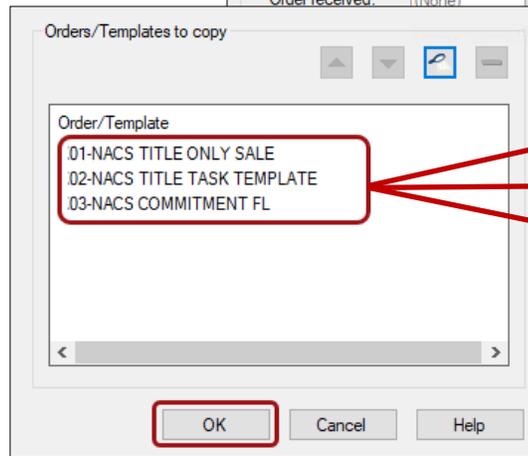
Order Entry screen

- ☐ Verify and change if needed,
  - ☐ **Order type**
  - ☐ **Transaction type**
  - ☐ **Product type**
  - ☐ **Policy type**
- ☐ Select **Escrow Officer/Closer** (Lead), if applicable
- ☐ Select **Pre-closer/Escrow Assistant** (Coordinator)
- ☐ Select **Title officer/Examiner**
- ☐ Enter **Settlement date** (or an estimated date), if applicable

- ❑ Enter **Related order(s)**, 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 **Lender**, if applicable
- ❑ Add the **Other (Referring Agent)**
- ❑ Add the **T2**-**outside Title Company**, if applicable
- ❑ **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)

- ❑ Using placeholders first, add additional Contacts, as needed

Property screen

- ❑ Enter additional properties, if applicable

Documents

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

Checklist Tasks Screen

- ❑ **Commitment Request Received** Task. set **Status = Completed**