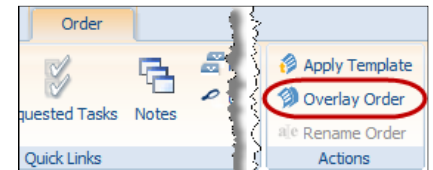


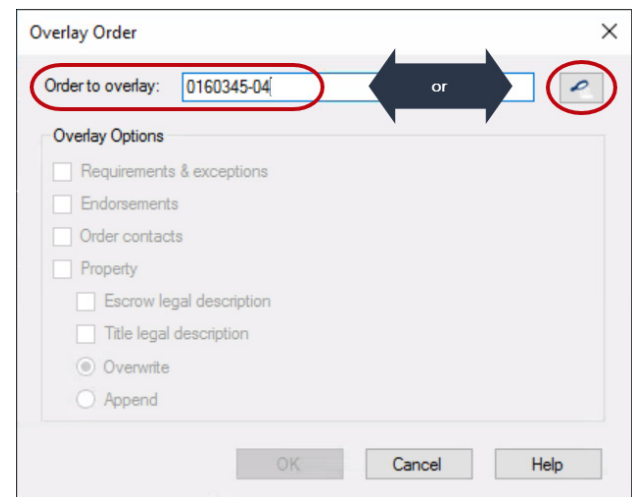
Overlaying One SoftPro Select Order onto Another

Follow these steps to copy exceptions/requirements, contacts, endorsements, and property information from one order to another. You are copying FROM the "source" order INTO the "destination" order.

1. With the "destination" order open, click the **Overlay Order** button

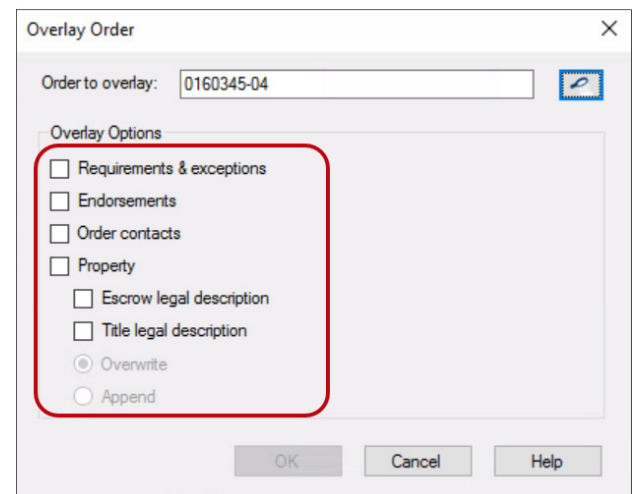


2. Validate "source" order number
 - › If you already know the "source" order number, enter it and press the **Tab** key
 - › If you don't already know the "source" order number, click the **Search** icon, search for & highlight, then click the **OK** button to select the "source" order



The **Overlay Options** are enabled once SoftPro validates the "source" order number.

- › **Requirements & exceptions** – add specific requirements/exceptions
- › **Endorsements** – add endorsements
- › **Order contacts** – add Contacts
- › **Property** – add the Property address, Escrow legal description and/or the Title legal description



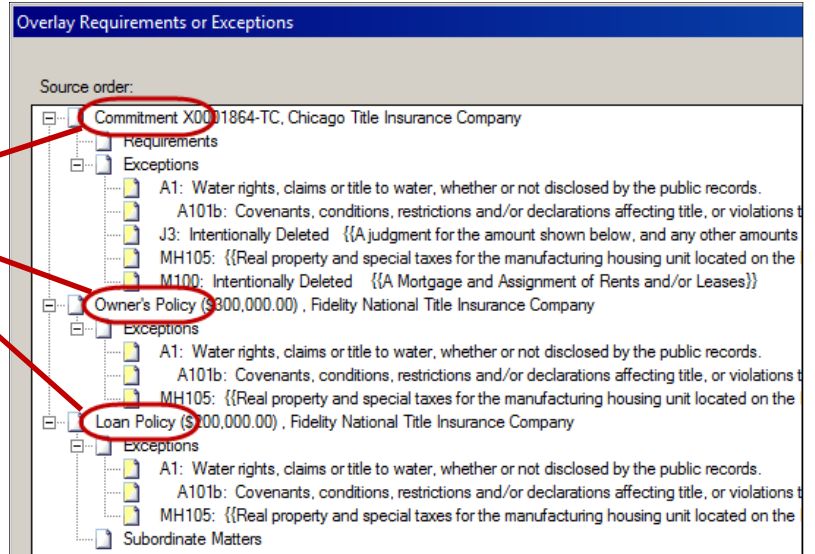
If Applicable: Overlay Exceptions/Requirements

The information pulled into the destination order may be an individual item or multiple items from a combination of sources (Commitment, Owner's Policy and/or Loan Policy).

Overlaying One SoftPro Select Order onto Another

3. Check the **Requirements & exceptions** check box

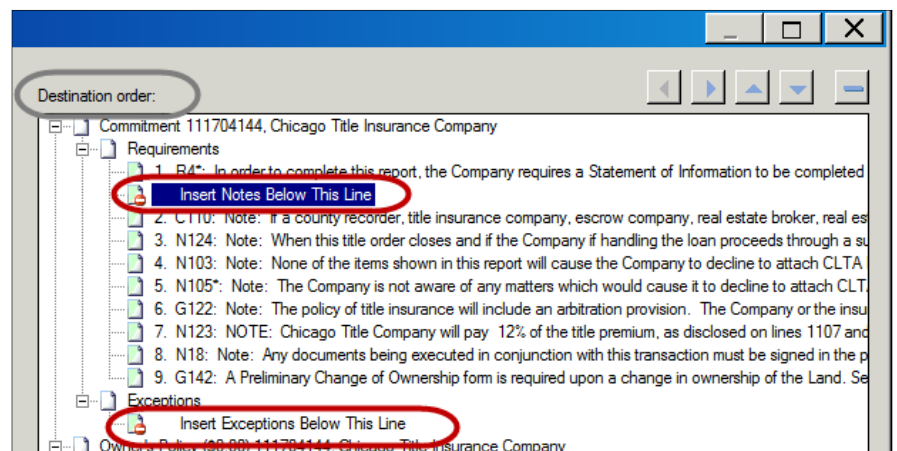
The **Overlay Requirements or Exceptions** window opens. You may select one or multiple items from the available sources.



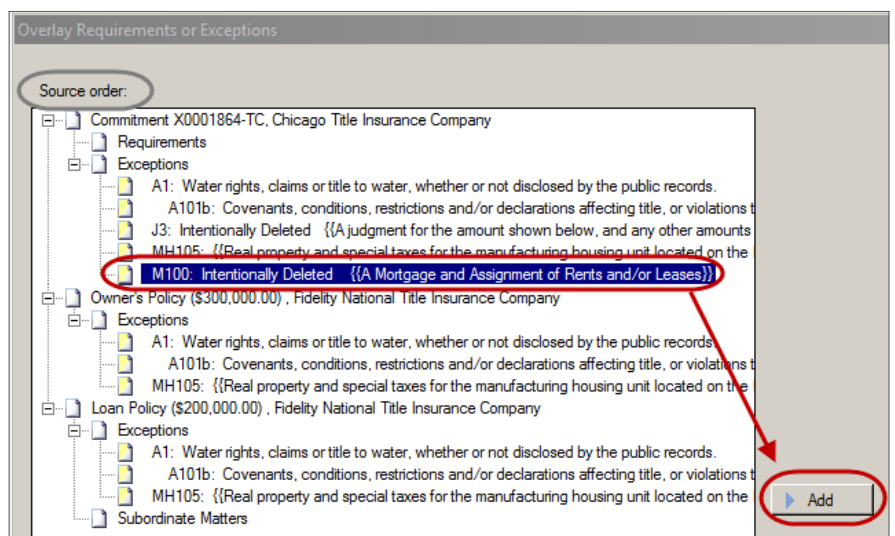
On the right, from the **Destination order**,

4. Highlight the applicable placeholder or entry where you want the new item(s) to follow

NOTE: New items pulled from the **Source order** follow the entry highlighted in the **Destination order**. This may be a placeholder, another exception or requirement or the section title (i.e., **Requirements**, **Exceptions**, etc.).

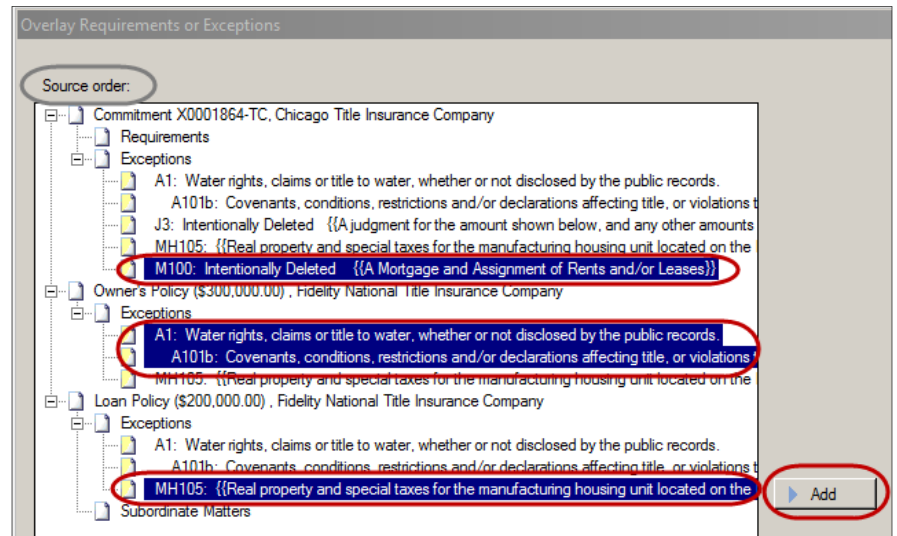


5. On the left, from the **Source order**,
 - > add a single item
 - a) highlight the item you wish to add
 - b) click the **Add** button



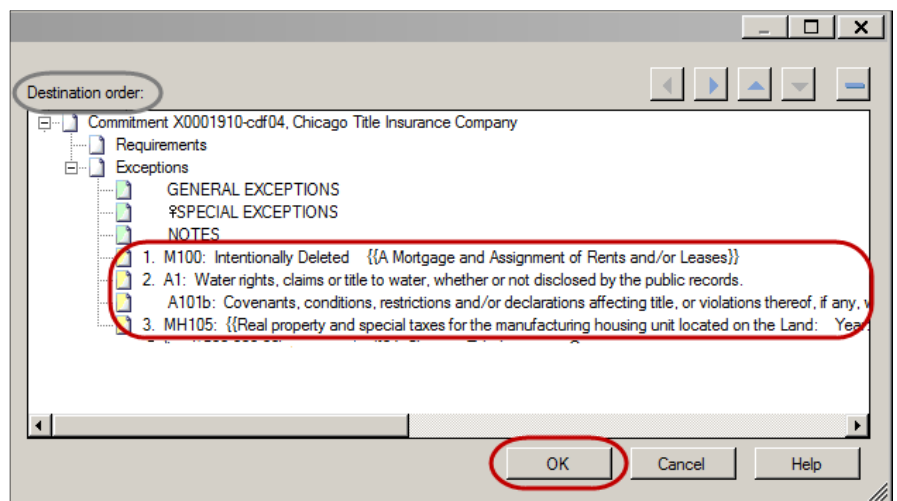
Overlaying One SoftPro Select Order onto Another

- > add multiple items
 - a) highlight the first item, holding your **Ctrl** key, click each item to be added
 - b) click the **Add** button



The items are added to the **Destination order** on the right.

- 6. Click the **OK** button



If Applicable: Overlay Order Contacts

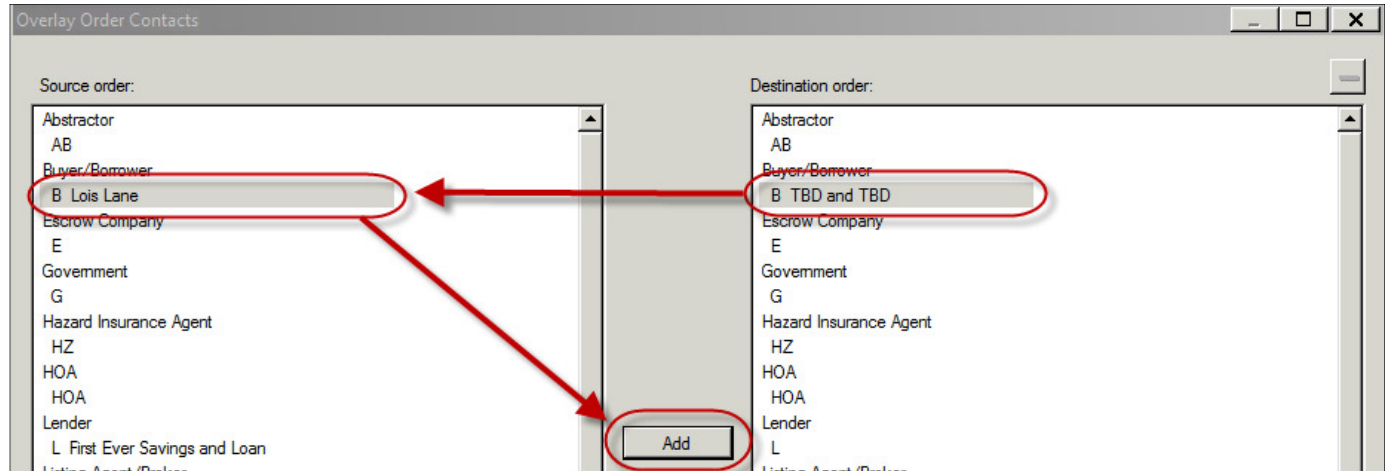
- 7. Check the **Order contacts** check box

The **Overlay Order Contacts** window opens.

- 8. On the right, **Destination order**, highlight the item you wish to add to, or update
- 9. On the left, **Source order**, highlight the item you wish to add to the **Destination order**; click **Add**

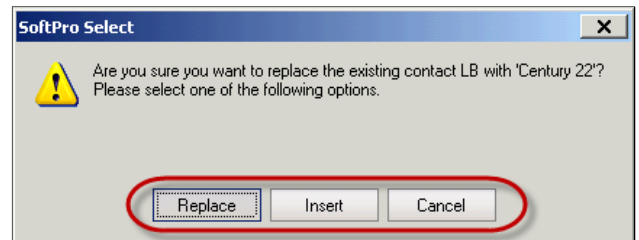
In our example, we are replacing the **Destination order B-Contact: TBD and TBD** with the **Source order B-Contact: Lois Lane**.

Overlaying One SoftPro Select Order onto Another



10. In the SoftPro Select window click one of the following buttons:

- › **Replace** – to replace the existing Contact in the “destination” order
- › **Insert** – to insert this Contact (leaving existing Contact intact)
- › **Cancel** – to abandon this action



The item is added to the **Destination Order** on the right.

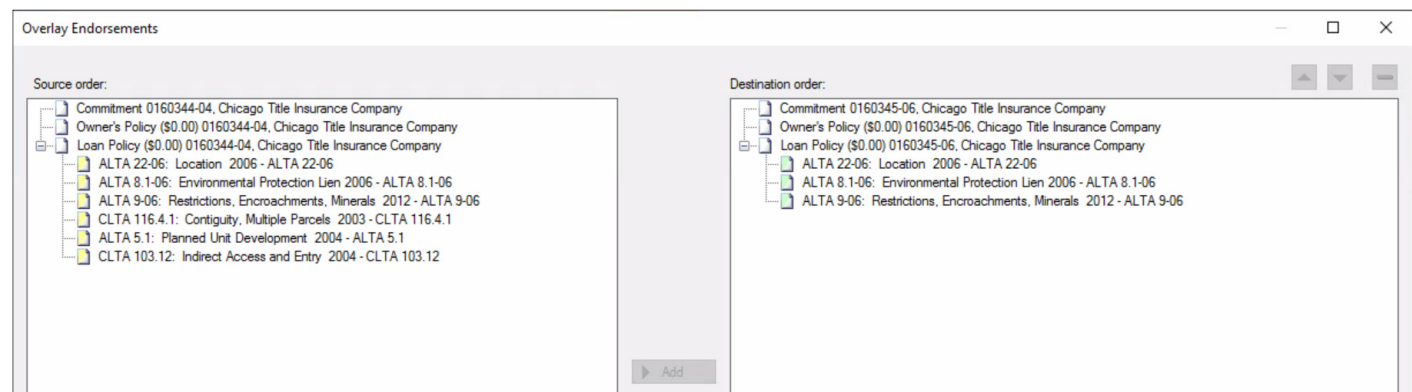
11. Repeat **Steps 8-10** until all Contacts are added
12. Click the **OK** button

IMPORTANT: NEVER overlay **A**-Settlement Agent, **T**-Title Company or **U**-Underwriter Contacts. Always select these from the appropriate Contact lookup table in your “destination” order.

If Applicable: Overlay Endorsement Information

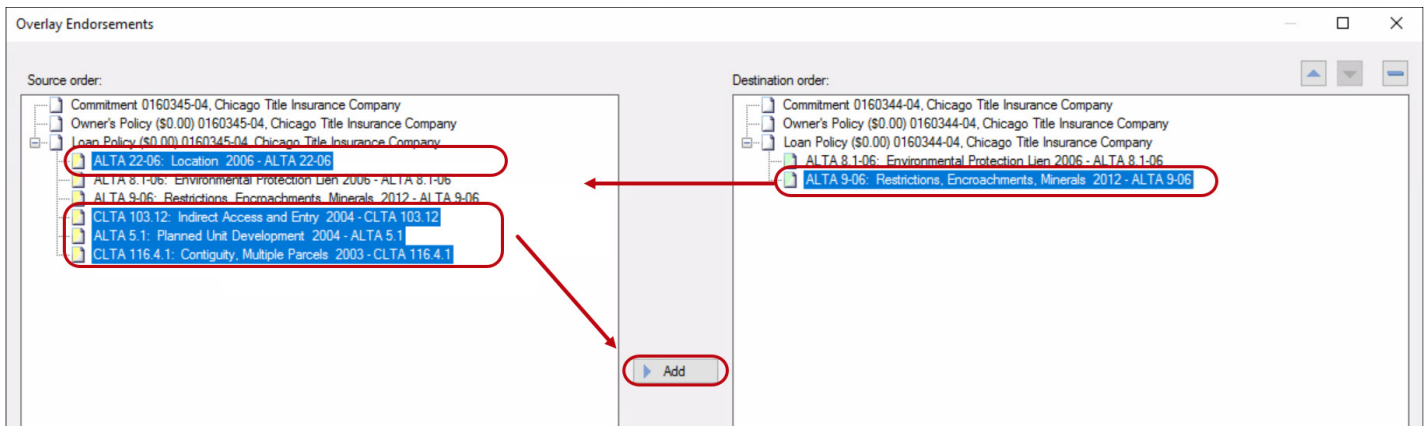
13. Check the **Endorsements** check box

The **Overlay Endorsements** window opens.



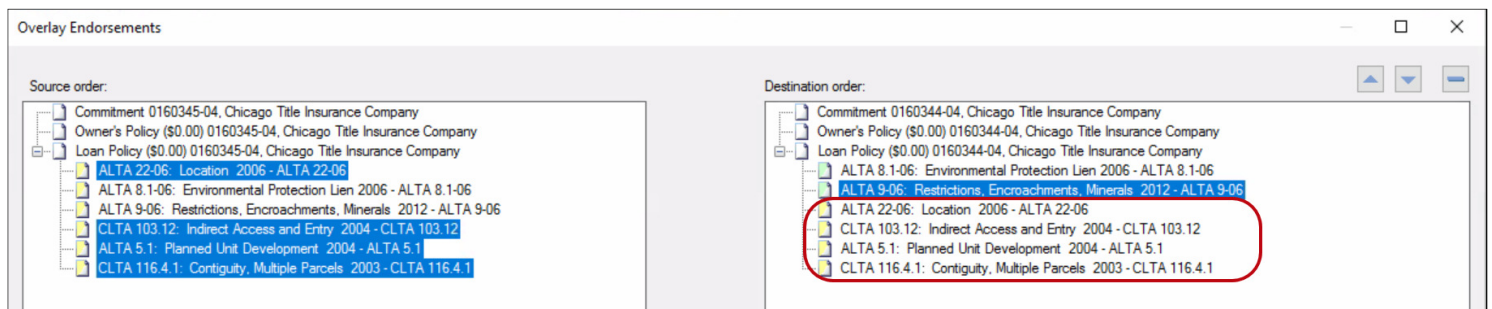
Overlaying One SoftPro Select Order onto Another

14. On the right, **Destination order**, highlight the item you want the added endorsement(s) to follow
15. On the left, **Source order**, highlight the item you wish to add to the **Destination order**; click **Add**



NOTE: If you wish to copy an entire folder, highlight the folder and click the **Add** button or drag-and-drop to the **Destination order**.

The added endorsement(s) show below the entry highlighted in the **Destination order**. You can re-order the endorsements using the toolbar icons on the **Endorsement** screen if needed.



16. Click the **OK** button to return to the **Overlay Order** window.

If Applicable: Overlay Property Information

17. Check the **Property** check box

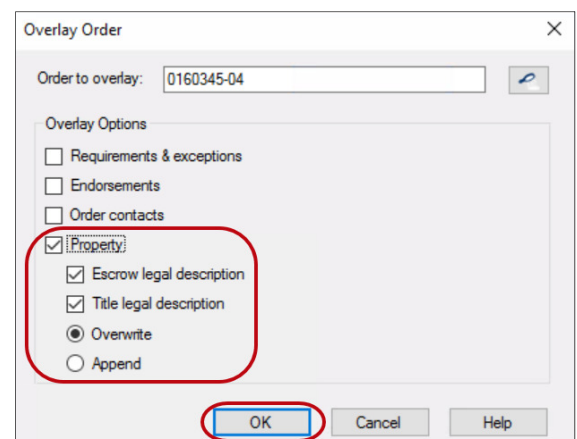
Both the **Escrow legal description** and the **Title legal description** are checked by default.

18. If applicable, uncheck the appropriate check box(es) based on the information needed

The default setting overwrites existing property information.

19. If applicable, select the **Append** radio button to add property information instead of overwriting

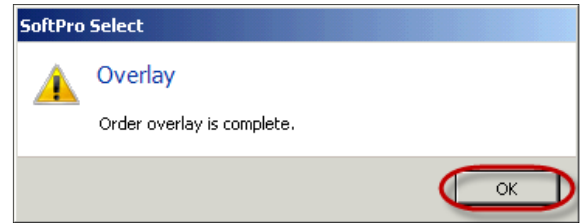
20. Click **OK**



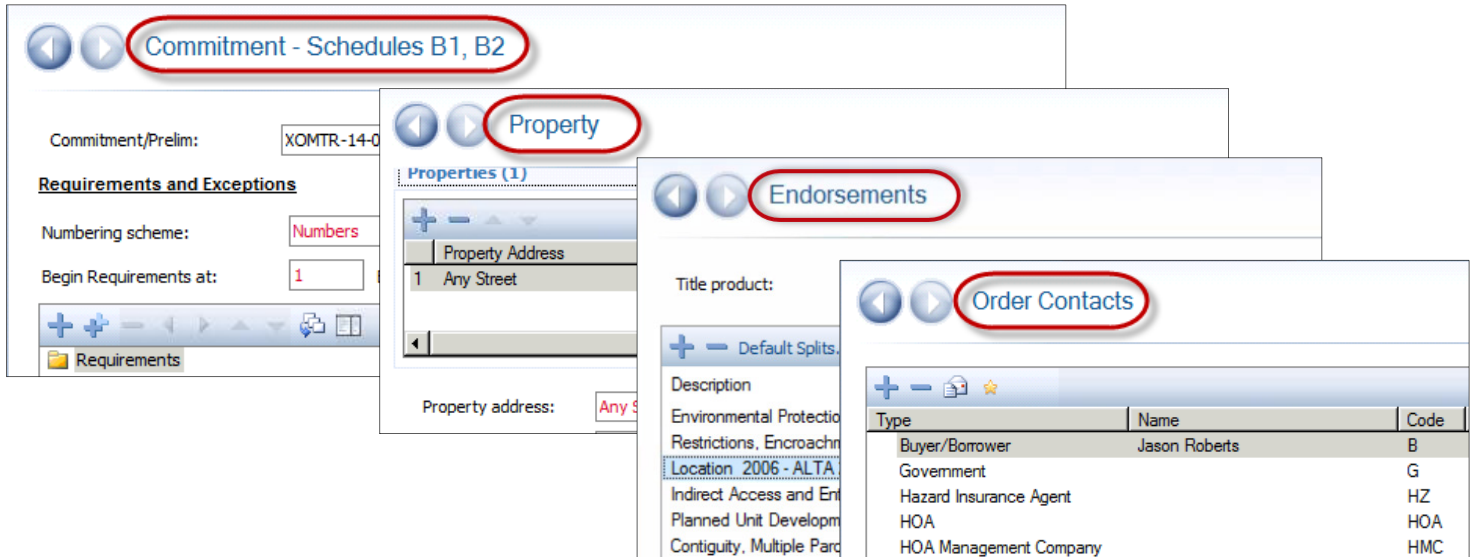
Overlaying One SoftPro Select Order onto Another

When complete, the **Overlay** pop-up window appears.

21. Click **OK**

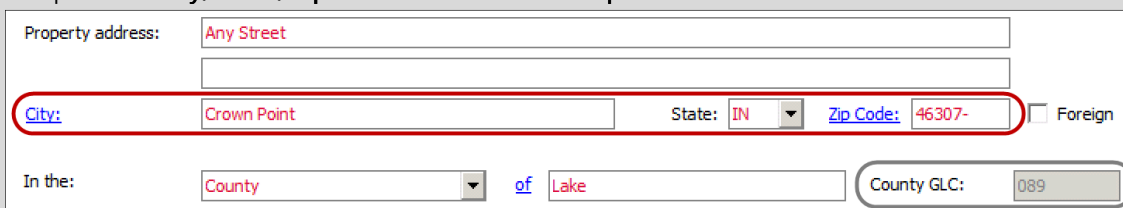


The information selected for overlay can be found on the appropriate screen(s).



IMPORTANT: When the **Property** information is written to the new order, the **County GLC** code does **not** populate. When this occurs,

1. Navigate to the **Property** screen
2. Re-pull the **City/State/Zip Code** from the **Lookup Table**



Property address: Any Street

City: Crown Point State: IN Zip Code: 46307- Foreign

In the: County of Lake County GLC: 089