

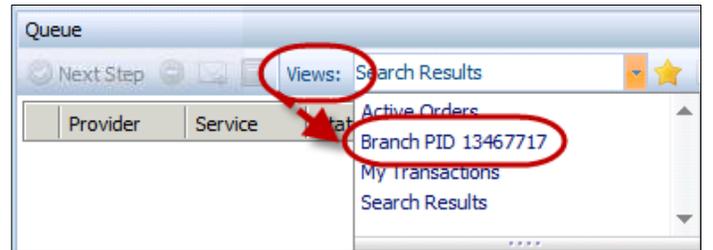
## Accepting Orders in SoftPro Select

Follow these steps to accept the RealEC order into your SoftPro Select order.

1. From the **360** ribbon, click the **Login** button
2. Once logged in, click the **360 Queue** button



3. From the **Views** drop-down, select your **Branch View** (if you do not have a Branch View, refer to [RealEC – Creating a Branch View in SPS](#))

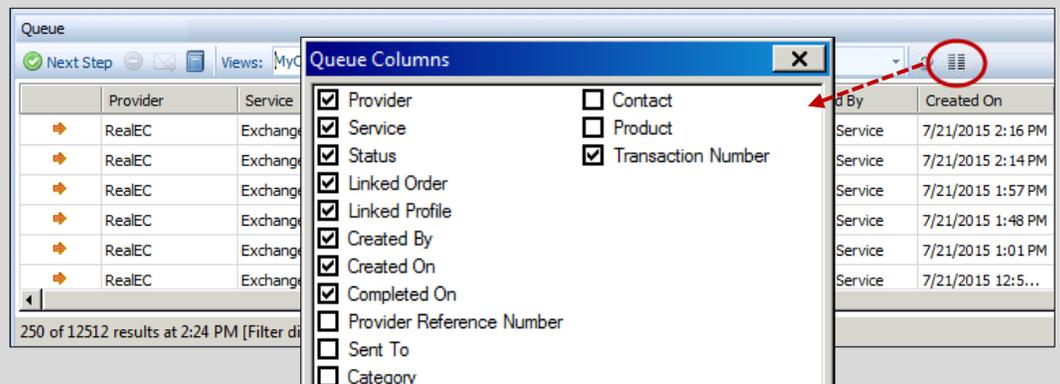


Your Queue populates with all RealEC transactions for your Branch.

Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On	Completed On	Description	Transaction
RealEC	Exchange	New			RealEC Service	7/21/2015 2:16 PM		FLORES-ORTEG...	910019-00-1507
RealEC	Exchange	New			RealEC Service	7/21/2015 2:14 PM		Gonzales, Karen...	910019-00-1507
RealEC	Exchange	In Progress	FCPF-0911509949	Default\PCA\W...	RealEC Service	7/21/2015 1:57 PM		VINSON, ANDRE...	910019-00-1507
RealEC	Exchange	New			RealEC Service	7/21/2015 1:48 PM		Greyz-Yusupov, ...	910019-00-1507
RealEC	Exchange	New			RealEC Service	7/21/2015 1:01 PM		Nil, Michael, 540...	910019-00-1507
RealEC	Exchange	New			RealEC Service	7/21/2015 12:5...		Tjepkema, Kare...	910019-00-1507

250 of 12512 results at 2:24 PM [Filter displaying 0 rows]

NOTE: Additional data may be added (or removed) by clicking the **Columns** icon. Check the corresponding check box for the information you wish to display (or uncheck to remove a column).



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Each transaction has two entries:

- > Escrow (i.e., 29 - Closing and Escrow Services)
- > Title (i.e., 3 - Commitment Prelim Report)

Description	Product
, 5489 SOUTHWOOD CT ANTIOCH, CA, Closing - only/ Lender...	29 - Closing and Escrow Services
, 5489 SOUTHWOOD CT ANTIOCH, CA, Title - only/ Lender...	3 - Commitment Prelim Report

### Importing RealEC Data

4. Highlight the Escrow entry
5. Click the **Next Step** button

Queue	Linked Profile	Created By	Created On	Completed On	Sent To	Description	Event	Product	Tran
<input checked="" type="checkbox"/> Next Step	2	Default\P\CA...	RealEC Service	7/20/2015 9:30 PM		Fernandez, Luz,...	100 - Service Received	29 - Closing and Escrow Services	100
	2	Default\P\CA...	RealEC Service	7/20/2015 9:30 PM		Fernandez, Luz,...	100 - Service Received	3 - Commitment Prelim Report	9100
			RealEC Service	6/17/2015 10:5...		Chilakamarry, Vj...	100 - Service Received	29 - Closing and Escrow Services	9100
			RealEC Service	6/17/2015 10:5...		Chilakamarry, Vj...	100 - Service Received	3 - Commitment Prelim Report	9100

6. From the **Review** window, click the **Order Search** button

Review

Select All | Select None | Field Codes | New Order | **Order Search** | linked To:

Groups:  Data

Name	Current Value	New Value
Last Name		Walker
Middle Name		Ann
Address 1		999 Evelyn Terrace West
Address 2		Unit 80

Information: Event 100 - Service Received  Add To Proform Notes

Name	Value
BORR - Bankruptcy Last Seven Years:	No
BORR - Foreclosure Last Seven Years:	No
Due Date:	07/27/

7. Make note of the property address, as it is needed in the next step

Order Search

Order Information

Order #:

Who has the file:

Settlement date: (None) through (None)

Order reserved: (None) through (None)

Order received: (None) through (None)

Order completed: (None) through (None)

Project name:

Order status:

Escrow status:

Title status:

Loan #:

Mtg. ins. case #:

Property Information

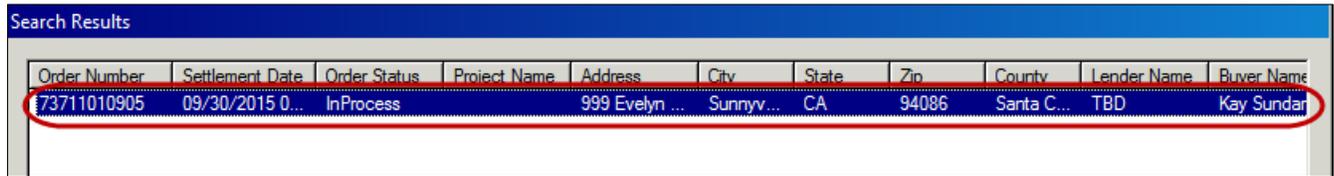
Address:

City/State/Zip:     Foreign

8. To narrow your search, enter the street number in the **Address** field and the City name in the **City/State/Zip** field

## Accepting Orders in SoftPro Select

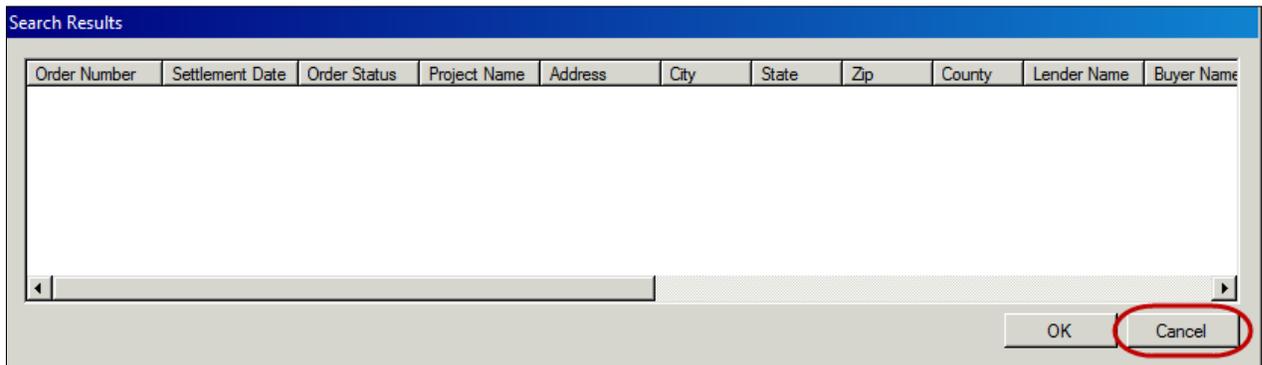
9. From the **Search Results** window, double-click the order to open (the order opens in the background)



Order Number	Settlement Date	Order Status	Project Name	Address	City	State	Zip	County	Lender Name	Buyer Name
73711010905	09/30/2015 0...	InProcess	999 Evelyn ...	Sunnynv...	CA	94086	Santa C...	TBD	Kay Sundar	

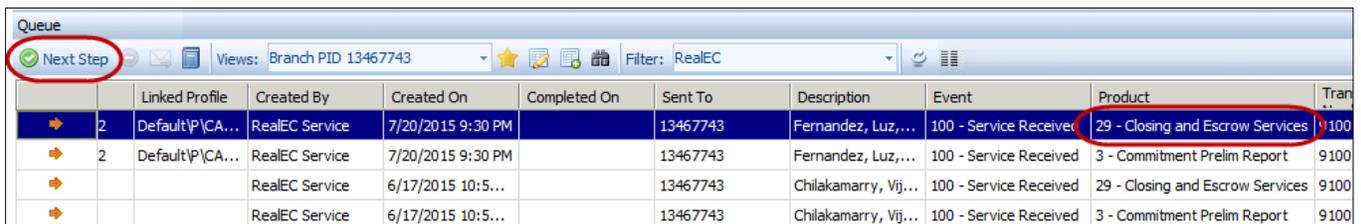
If no results display, a new order must be created.

- a. Click the **Cancel** button



Order Number	Settlement Date	Order Status	Project Name	Address	City	State	Zip	County	Lender Name	Buyer Name
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- b. Close the **Search** window and the **360 Review** window
- c. When on **SoftPro Start Page**, create a new order
- d. Save the order, making sure to resolve any warning or error messages
- e. Click the **Queue** tab
- f. Click the **Next Step** button

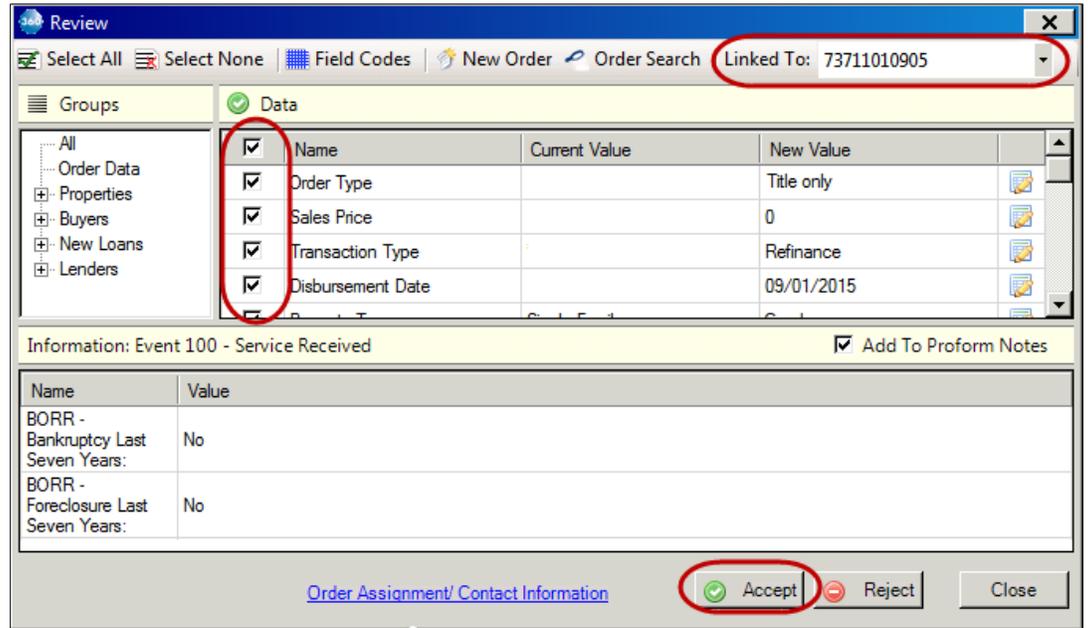


	Linked Profile	Created By	Created On	Completed On	Sent To	Description	Event	Product	Tran
2	Default\P\CA...	RealEC Service	7/20/2015 9:30 PM		13467743	Fernandez, Luz,...	100 - Service Received	29 - Closing and Escrow Services	100
2	Default\P\CA...	RealEC Service	7/20/2015 9:30 PM		13467743	Fernandez, Luz,...	100 - Service Received	3 - Commitment Prelim Report	9100
		RealEC Service	6/17/2015 10:5...		13467743	Chilakamarry, Vj...	100 - Service Received	29 - Closing and Escrow Services	9100
		RealEC Service	6/17/2015 10:5...		13467743	Chilakamarry, Vj...	100 - Service Received	3 - Commitment Prelim Report	9100

- g. Continue with **Step 10**

## Accepting Orders in SoftPro Select

10. In the **Review** window, from the **Linked To** drop-down, select the number of the opened order
11. Check (or uncheck) all applicable check boxes in the **Data** section to import into the SoftPro order
12. Click the **Accept** button to import the applicable Data



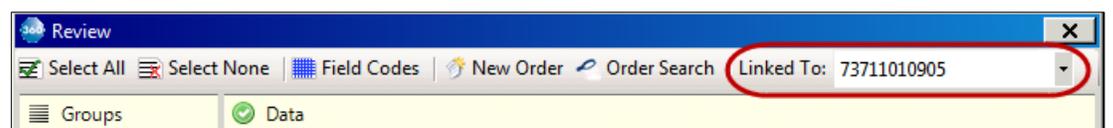
The RealEC transaction is linked. Your SoftPro Select order number appears in the **Linked Order** field and the **Status** is changed to **In Progress**.

Provider	Service	Status	Linked Order	Linked Profile	Created By
RealEC	Exchange	In Progress	FSNX-7051500962	Default\PCA\N...	RealEC Service
RealEC	Exchange	New			RealEC Service
RealEC	Exchange	In Progress	73711010905	Default\PCA\S...	RealEC Service
RealEC	Exchange	New			RealEC Service
RealEC	Exchange	In Progress	FCPF-0911509961	Default\PCA\N...	RealEC Service

With your SPS Order still open,

13. Click the **Queue** tab
14. Highlight the Title entry
15. Click the **Next Step** button
16. In the **Review** window, from the

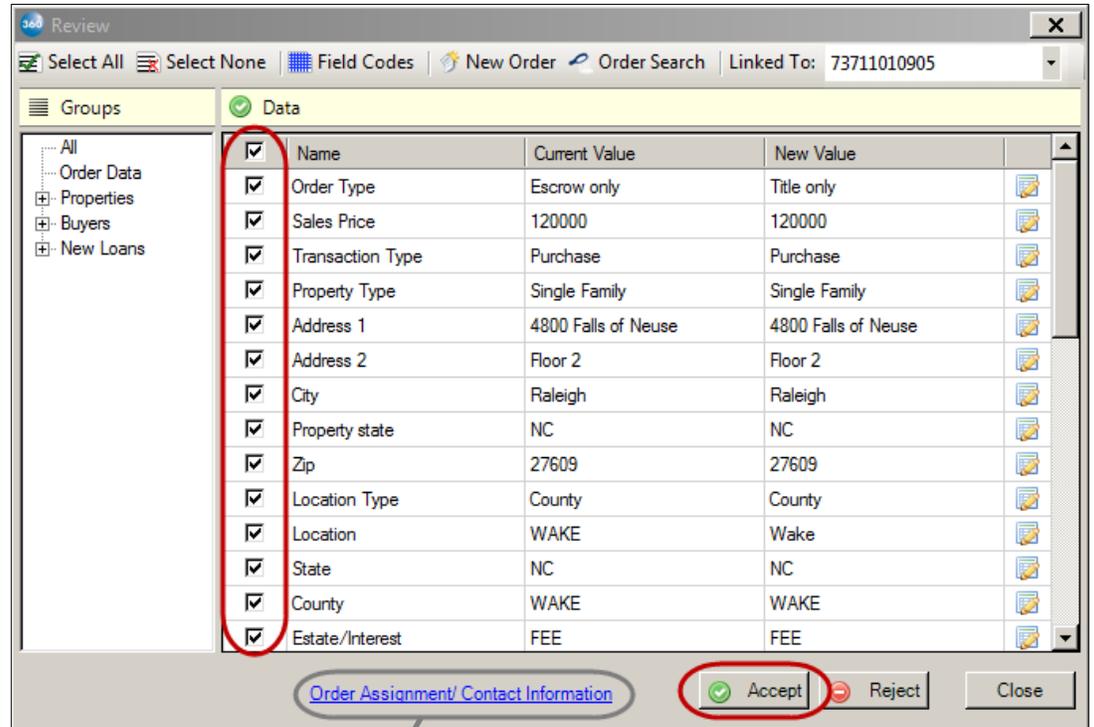
Service	Status	Product	Linked Order	Linked Profile	Description
Exchange	New	403 - PIRT			Hanada,
Exchange	In Progress	29 - Closing and Escrow Services	73711010905	Default\PCA\S...	Walker, t
Exchange	New	3 - Commitment Prelim Report			Walker,
Exchange	In Progress	403 - PIRT	FCPF-0911509961	Default\PCA\N...	Yee, Pau



## Accepting Orders in SoftPro Select

Linked To drop-down, select the number of the opened order

17. Check (or uncheck) all applicable check boxes in the Data section
18. Click the **Accept** button



If you have not already done so, enter the **Office Assignment/Contact Information**. This only needs to be done once and then is saved for all future orders.

1. Click the **Order Assignment/ Contact Information** link
2. Enter the,
  - a. **Assigned to Office**
  - b. **Order Contact** name
  - c. **Contact Phone Number**
3. Click the **Save** button

