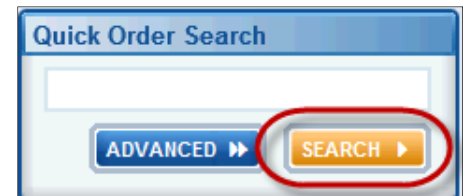# Using Quick & Advanced Search and Working with Search Results

Both order search options in SoftPro Select: **Quick Order Search** and **Advanced ProForm Search** are accessed from the **Start Page**. Follow these steps to successfully search for and locate orders, and work with the **Search Results** pane.
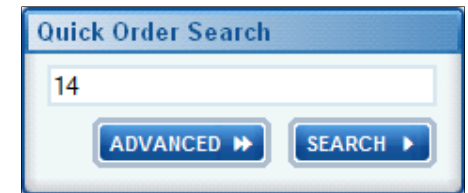
Quick Order Search

〉 You can press the **Ctrl + Alt + O** keyboard shortcut to activate the Quick Search.

〉 The Quick Search looks at the following fields:

  » Order Number

  » Address1 on all properties

  » Name on all Contacts

〉 Results can be numerous. If the number of records is too large, return to the **Start Page** to perform an Advanced Search.

〉 The most efficient way to search for an order is to enter 5-7 digits of the numeric portion of the order.

To run a **Quick Order Search**,

1. Navigate to the SoftPro Select **Start Page**

2. In the **Quick Order Search** field, enter the last few numbers of the order number

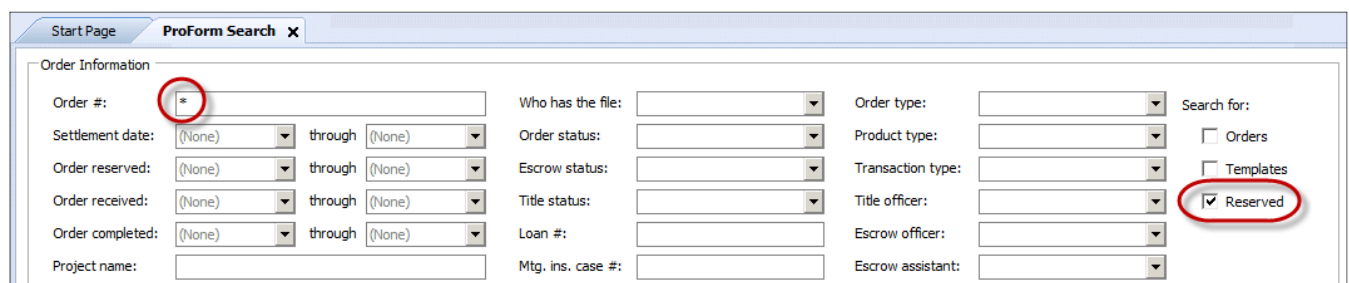3. Press the **Enter** key (or click **Search** button)

In our example, our search results yield **325** records because the **Quick Order Search** searches across multiple fields.

Advanced ProForm Search

〉 Enter search criteria in a specific field, or search criteria across multiple fields.

〉 Results are fewer, and "fine-tuned".

〉 You can run a search with no criteria; however you must at least select the **Orders** or **Templates** check box.

〉 You must use the ***** (asterisk) wildcard when searching for **Reserved** orders.
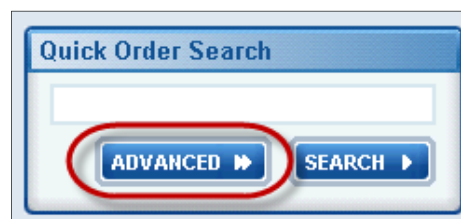
Using Quick & Advanced Search and Working with Search Results

To run an **Advanced Search**,

1. From the ribbon, click the **Order Search** button
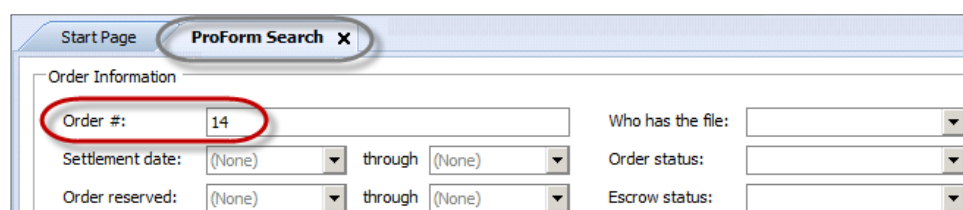

Or
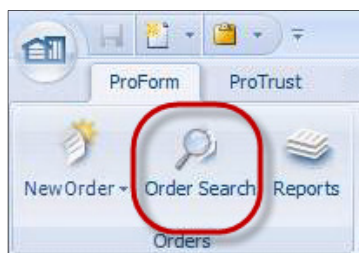
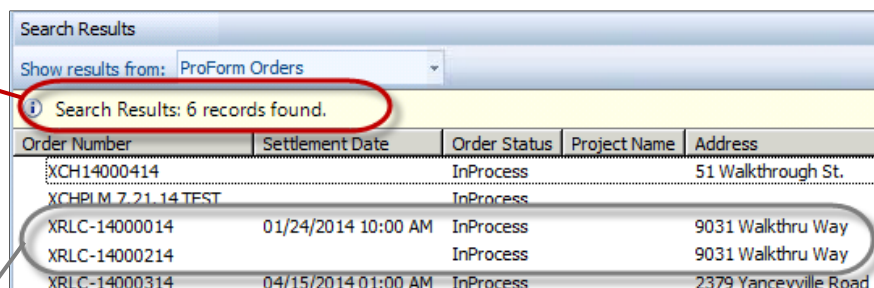1. From the SoftPro Select **Start Page**, click the **Advanced** button

The **ProForm Search** screen appears with its own tab, allowing you to enter search criteria in one or more fields.

2. Enter the last few numbers of the order number

3. Press the **Enter** key (or click the **Search** button)

In our example, our search results yield **6** records because the **Advanced ProForm Search** specifically searched **Order #** ending with 14.
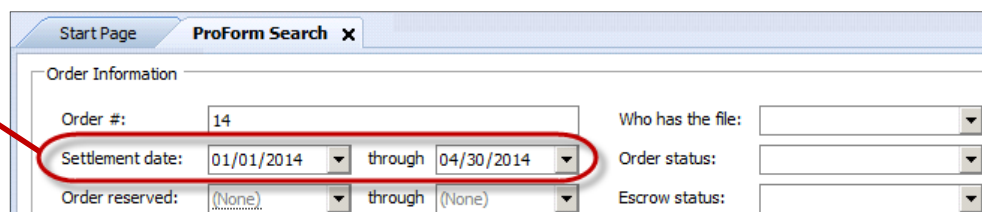
NOTE: If a duplicate order is found, you can use the **Ctrl + Alt + X** keyboard shortcut to cancel the duplicate.

To further refine the search results, enter additional search criteria.
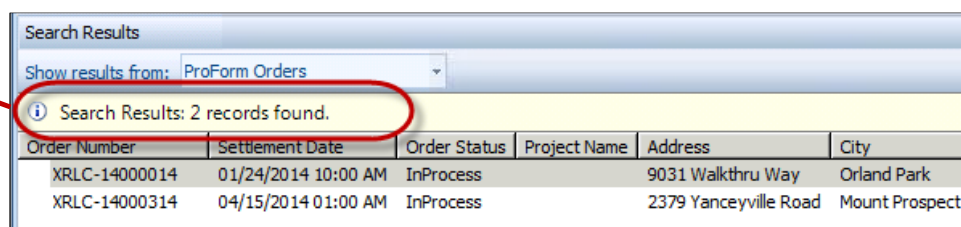
4. Click away from the **Search Results** pane to return to the **ProForm Search** screen

5. Enter additional criteria

In our example, we enter a **Settlement date** range (in addition to the existing **Order #** criteria).

Using Quick & Advanced Search and Working with Search Results

In our example, our search results yield **2** records because the **Advanced ProForm Search** searched based on two criteria.
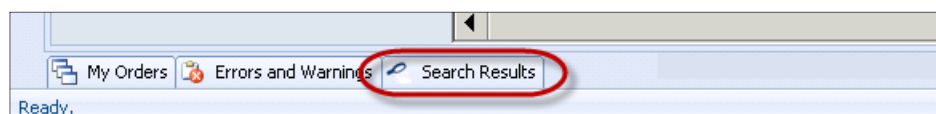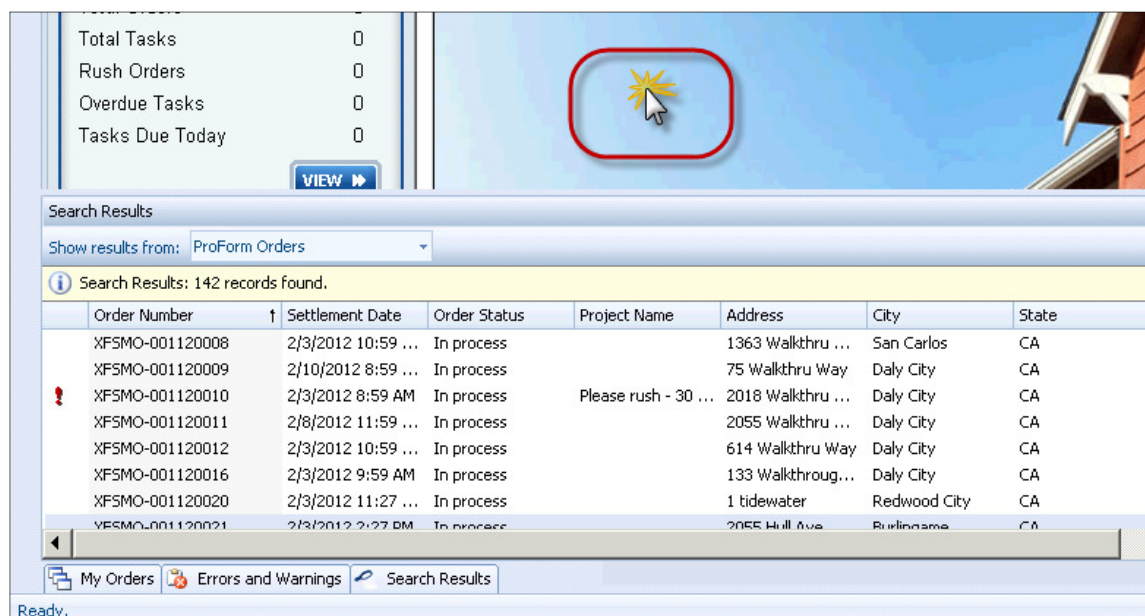

Working with the Search Results Pane

The **Search Results** pane collapses (or auto-hides) out of view once you click away from the pane.

〉 To expand the pane click the **Search Results** tab at the bottom of the screen to open the results of your last search.
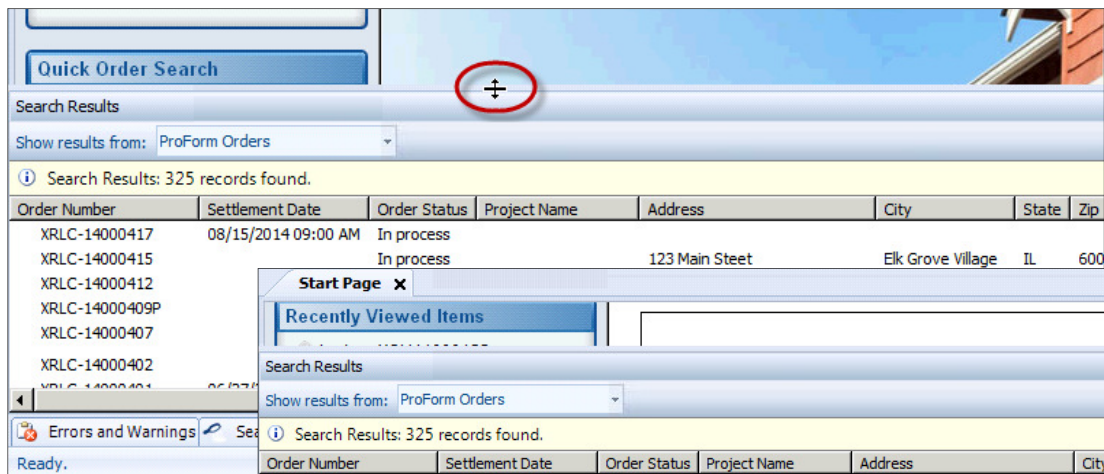

〉 To collapse the pane click your cursor in an empty area above the pane.

〉 You can resize the pane, making the pane taller (or shorter) to see more (or less) of the search results.

a) Hover your cursor at the top of the pane until you see the double-arrow resizing cursor

b) Drag-and-drop to expand or contract the pane height

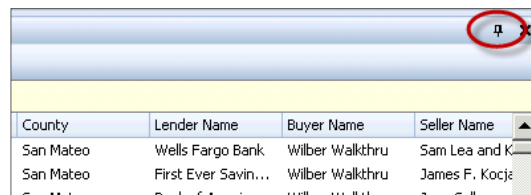# Using Quick & Advanced Search and Working with Search Results

Before

After

⟩ You can "pin" the pane in place, when investigating multiple orders, by clicking the **Auto-Hide** icon. The pane no longer collapses (or auto-hides) when you move your cursor away. Once "pinned" you can re-activate the pane's auto-hide feature by clicking the icon again.

  Click to pin
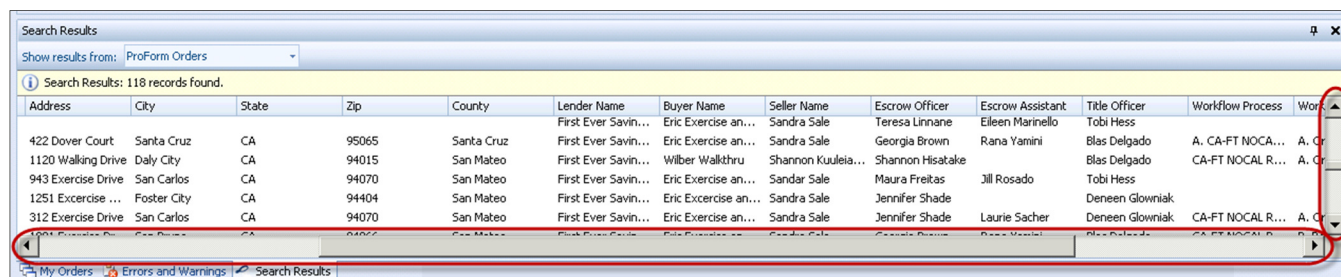
  Click to collapse

Using Quick & Advanced Search and Working with Search Results

Working with the Orders in the Search Results Pane

〉 You can double-click an order to open it.

〉 When viewing search results, use the vertical and/or horizontal scroll bars to scroll up and down (view more orders), or left and right (view more columns.
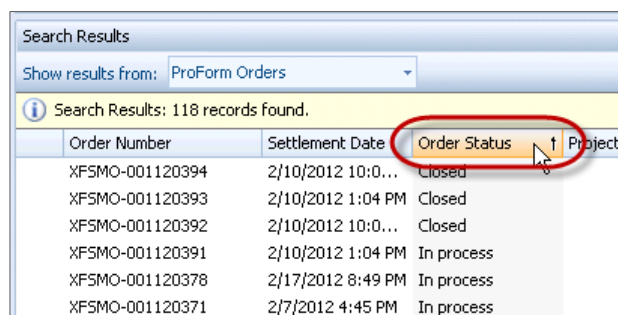

〉 You can sort search results by clicking a column header to sort the results in ascending (↑) alpha-numeric order. Click the header again to sort in descending (↓) order.
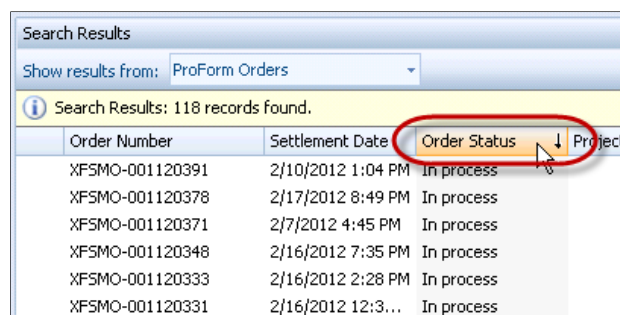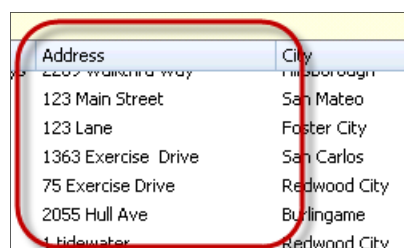

〉 You can resize a search results column to read more verbiage in the column.

a) Hover your cursor between column headers until the cursor changes to a double-arrow

b) Double-click to expand the column to the maximum data width or drag-and-drop to expand or contract the column width

Before   After