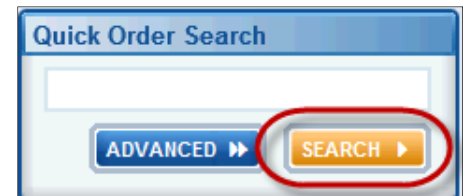


## Using Quick & Advanced Search and Working with Search Results

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

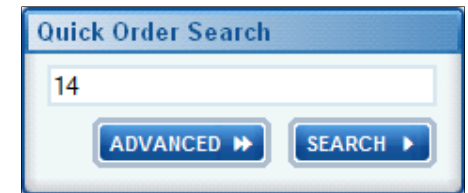
- › You can press the **Ctrl + Alt + O** keyboard shortcut to activate the Quick Search.
- › The Quick Search looks at the following fields:
  - » Order Number
  - » Address1 on all properties
  - » Name on all Contacts



- › 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)

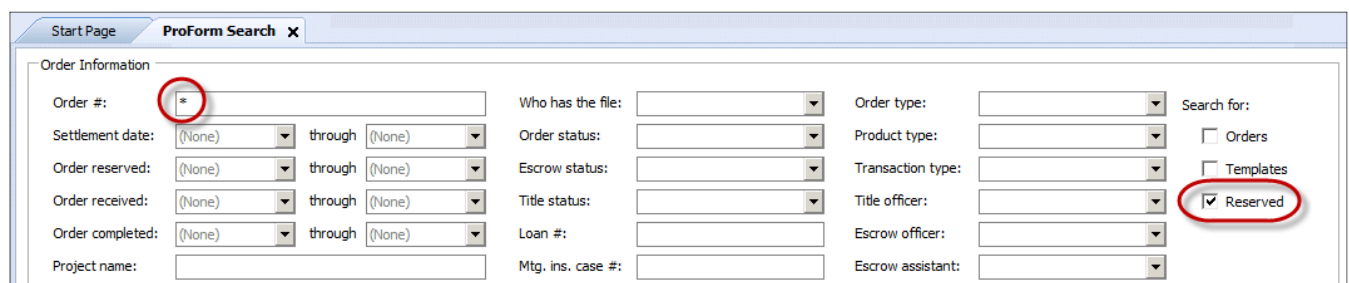


In our example, our search results yield **325** records because the **Quick Order Search** searches across multiple fields.

Search Results				
Show results from: ProForm Orders				
Search Results: 325 records found.				
Order Number	Settlement Date	Order Status	Project Name	Address
XRLC-14000417	08/15/2014 09:00 AM	In process		
XRLC-14000415		In process		123 Main Street

### Advanced ProForm Search

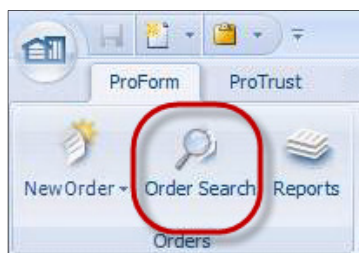
- › Enter search criteria in a specific field, or search criteria across multiple fields.
- › Results are fewer, and "fine-tuned".
- › You can run a search with no criteria; however you must at least select the **Orders** or **Templates** check box.
- › You must use the **\*** (asterisk) wildcard when searching for **Reserved** orders.



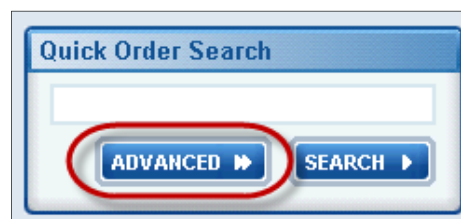
## Using Quick & Advanced Search and Working with Search Results

To run an **Advanced Search**,

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



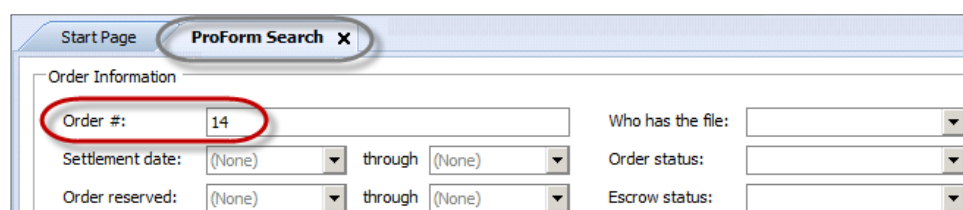
1. From the SoftPro Select **Start Page**, click the **Advanced** button



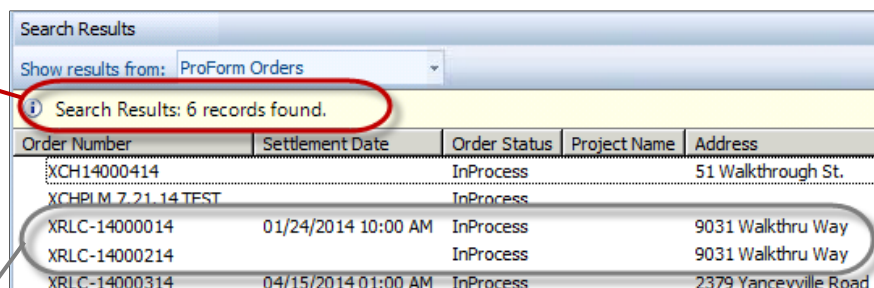
Or

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.



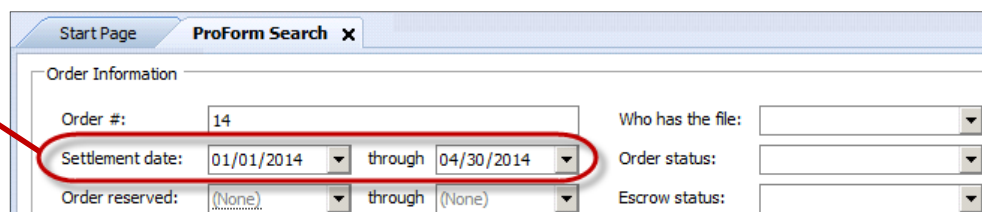
Order Number	Settlement Date	Order Status	Project Name	Address
XCH14000414		InProcess		51 Walkthrough St.
XCHPLM 7.21.14 TEST		InProcess		
XRLC-14000014	01/24/2014 10:00 AM	InProcess		9031 Walkthru Way
XRLC-14000214		InProcess		9031 Walkthru Way
XRLC-14000314	04/15/2014 01:00 AM	InProcess		2379 Yanceyville Road

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.

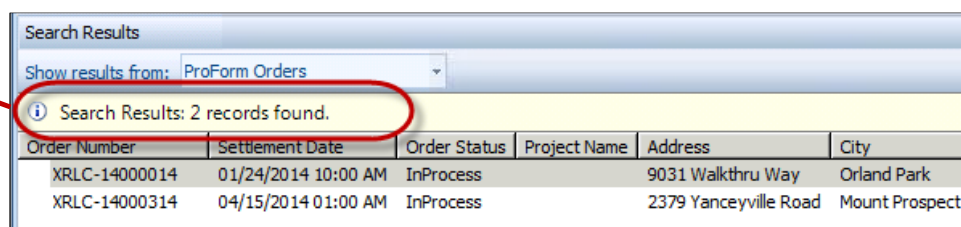
4. Click away from the **Search Results** pane to return to the **ProForm Search** screen
5. Enter additional criteria

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.

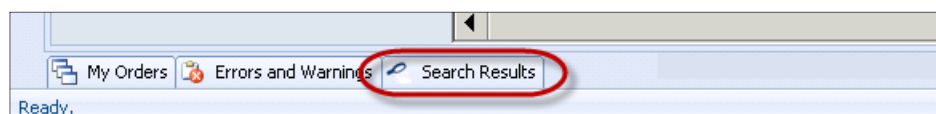


Order Number	Settlement Date	Order Status	Project Name	Address	City
XRLC-14000014	01/24/2014 10:00 AM	InProcess		9031 Walkthru Way	Orland Park
XRLC-14000314	04/15/2014 01:00 AM	InProcess		2379 Yanceyville Road	Mount Prospect

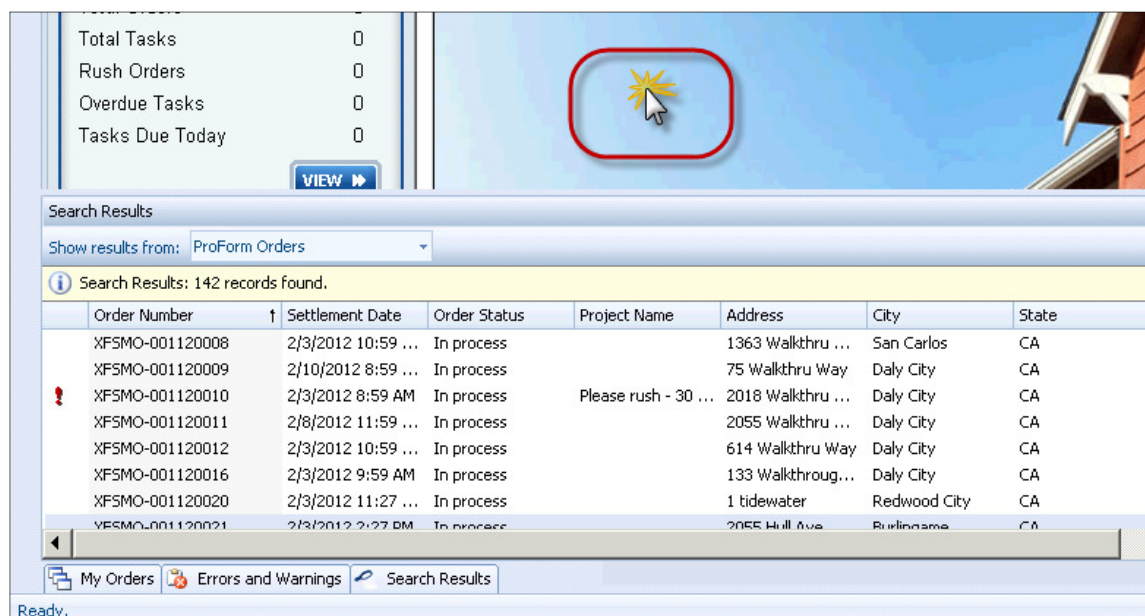
### Working with the Search Results Pane

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.



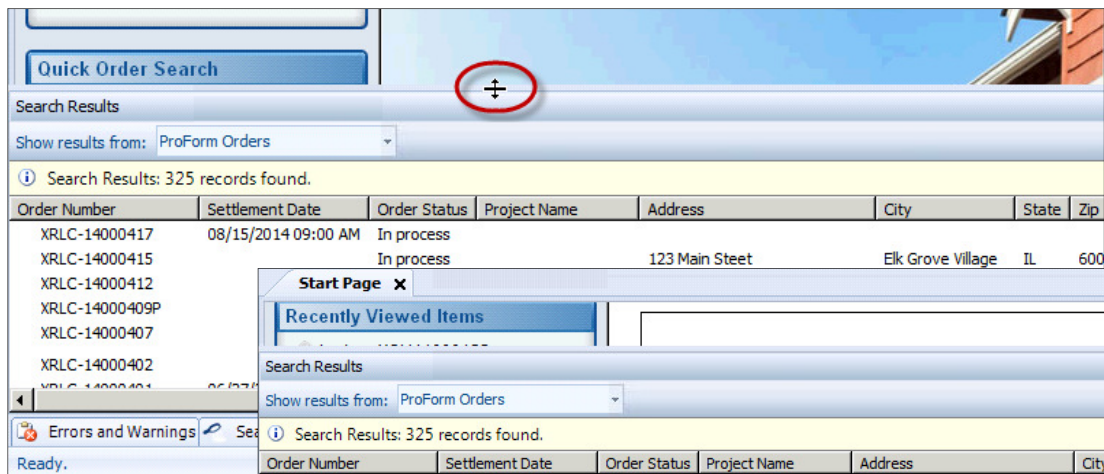
- › To collapse the pane click your cursor in an empty area above the pane.



- › You can resize the pane, making the pane taller (or shorter) to see more (or less) of the search results.
  - Hover your cursor at the top of the pane until you see the double-arrow resizing cursor
  - Drag-and-drop to expand or contract the pane height

## Using Quick & Advanced Search and Working with Search Results

Before



After

Start Page X

Recently Viewed Items

Search Results

Show results from: ProForm Orders

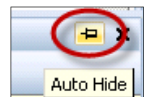
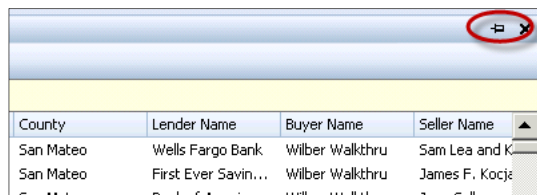
Search Results: 325 records found.

Order Number	Settlement Date	Order Status	Project Name	Address	City	State	Zip
XRLC-14000417	08/15/2014 09:00 AM	In process					
XRLC-14000415		In process		123 Main Steet	Elk Grove Village	IL	600
XRLC-14000412		In process					
XRLC-14000409P		In process					
XRLC-14000407		In process					
XRLC-14000402		In process					
XRLC-14000401		In process					
XRLC-14000417	08/15/2014 09:00 AM	In process					
XRLC-14000415		In process		123 Main Steet	Elk Grove Village	IL	600
XRLC-14000412		In process		1234 Anystreet Drive	Vernon Hills	IL	600
XRLC-14000409P		In process					
XRLC-14000407		In process		1823 Clybourn Ave	Chicago	IL	606
XRLC-14000406		In process		1726 W. 19th Street	Chicago	IL	606
XRLC-14000405		In process		1726 W. 19th	Chicago	IL	606
XRLC-14000404	06/27/2014 01:00 AM	In process		3454 Goins Gate Road	Bolingbrook	IL	604
XRLC-14000403	06/27/2014 01:00 AM	In process		1908 Green Acres	Orland Park	IL	604
XRLC-14000402		In process		5342 Happy Hollow Road	Bolingbrook	IL	604
XRLC-14000401	06/27/2014 01:00 AM	In process		3322 Kerry Lane	Steger	IL	604
XRLC-14000399	06/27/2014 01:00 AM	In process		523 Plum Lane	Country Club Hills	IL	604
XRLC-14000397		In process					
XRLC-14000396		In process		443 Laurel Ridge Road	Hometown	IL	604
XRLC-14000394		In process			Harvey	IL	604
XRLC-14000393		In process			Saint Louis	MO	631
XRLC-14000392		In process			Newburgh	IN	476
XRLC-14000391	05/16/2014 01:00 AM	In process		677 Paradise Lane	Newburgh	IN	476
XRLC-14000389	05/16/2014 01:00 AM	Canceled		5701 Palm Drive	Chicago	IL	606
XRLC-14000388		In process			Winfield	IL	601
XRLC-14000386		In process		123 main	Chicago	IL	606
XRLC-14000385		In process		123 Main	Crown Point	IN	463

Errors and Warnings Search Results

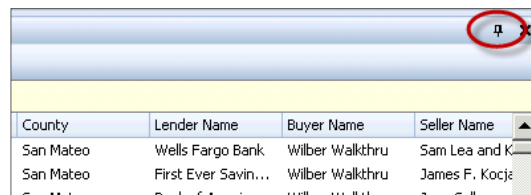
Ready.

- › 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.

County	Lender Name	Buyer Name	Seller Name
San Mateo	Wells Fargo Bank	Wilber Walkthru	Sam Lea and K...
San Mateo	First Ever Savin...	Wilber Walkthru	James F. Kocje
San Mateo	Bank of America	Wilbur Walkthru	Joey Seller and

Click to  
pin



County	Lender Name	Buyer Name	Seller Name
San Mateo	Wells Fargo Bank	Wilber Walkthru	Sam Lea and K...
San Mateo	First Ever Savin...	Wilber Walkthru	James F. Kocje
San Mateo	Bank of America	Wilbur Walkthru	Joey Seller and

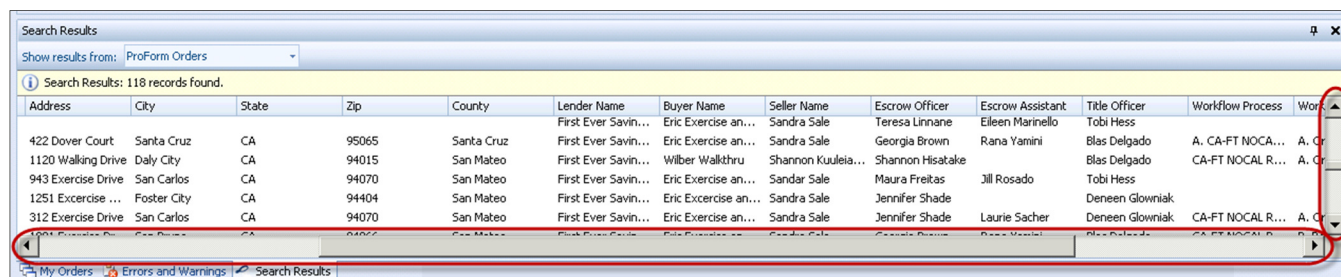
Click to  
collapse



## 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).



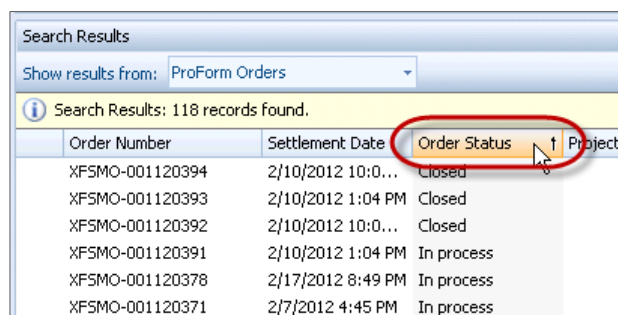
Search Results

Show results from: ProForm Orders

Search Results: 118 records found.

Address	City	State	Zip	County	Lender Name	Buyer Name	Seller Name	Escrow Officer	Escrow Assistant	Title Officer	Workflow Process	Work
422 Dover Court	Santa Cruz	CA	95065	Santa Cruz	First Ever Savin...	Eric Exercise an...	Sandra Sale	Teresa Linnane	Eileen Marinello	Tobi Hess	A. CA-FT NOCA...	A. Cr
1120 Walking Drive	Daly City	CA	94015	San Mateo	First Ever Savin...	Eric Exercise an...	Sandra Sale	Georgia Brown	Rana Yamini	Blas Delgado	CA-FT NOCAL R...	A. Cr
943 Exercise Drive	San Carlos	CA	94070	San Mateo	First Ever Savin...	Eric Exercise an...	Sandra Sale	Maura Freitas	Jill Rosado	Tobi Hess		
1251 Exercise ...	Foster City	CA	94404	San Mateo	First Ever Savin...	Eric Exercise an...	Sandra Sale	Jennifer Shade		Deneen Glowniak		
312 Exercise Drive	San Carlos	CA	94070	San Mateo	First Ever Savin...	Eric Exercise an...	Sandra Sale	Jennifer Shade	Laurie Sachet	Deneen Glowniak	CA-FT NOCAL R...	A. Cr

- › 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.

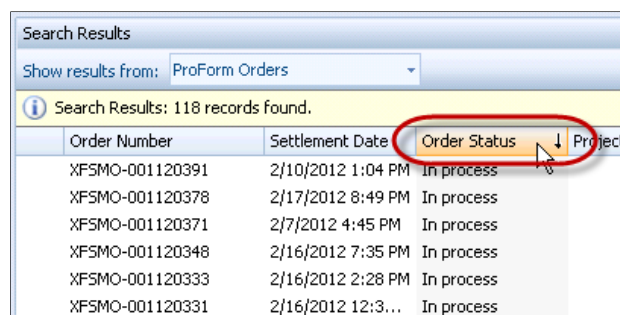


Search Results

Show results from: ProForm Orders

Search Results: 118 records found.

Order Number	Settlement Date	Order Status	Project
XF5MO-001120394	2/10/2012 10:0...	Closed	
XF5MO-001120393	2/10/2012 1:04 PM	Closed	
XF5MO-001120392	2/10/2012 10:0...	Closed	
XF5MO-001120391	2/10/2012 1:04 PM	In process	
XF5MO-001120378	2/17/2012 8:49 PM	In process	
XF5MO-001120371	2/7/2012 4:45 PM	In process	



Search Results

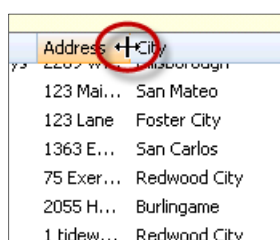
Show results from: ProForm Orders

Search Results: 118 records found.

Order Number	Settlement Date	Order Status	Project
XF5MO-001120391	2/10/2012 1:04 PM	In process	
XF5MO-001120378	2/17/2012 8:49 PM	In process	
XF5MO-001120371	2/7/2012 4:45 PM	In process	
XF5MO-001120348	2/16/2012 7:35 PM	In process	
XF5MO-001120333	2/16/2012 2:28 PM	In process	
XF5MO-001120331	2/16/2012 12:3...	In process	

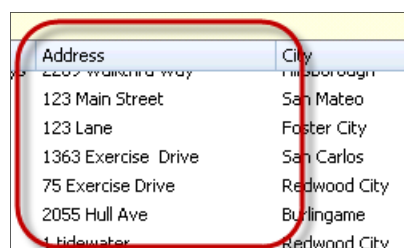
- › You can resize a search results column to read more verbiage in the column.
  - Hover your cursor between column headers until the cursor changes to a double-arrow
  - Double-click to expand the column to the maximum data width or drag-and-drop to expand or contract the column width

Before



Address	City
123 Main Street	San Mateo
123 Lane	Foster City
1363 E...	San Carlos
75 Exer...	Redwood City
2055 H...	Burlingame
1 tidew...	Redwood City

After



Address	City
123 Main Street	San Mateo
123 Lane	Foster City
1363 Exercise Drive	San Carlos
75 Exercise Drive	Redwood City
2055 Hull Ave	Burlingame
1 tidewater	Redwood City