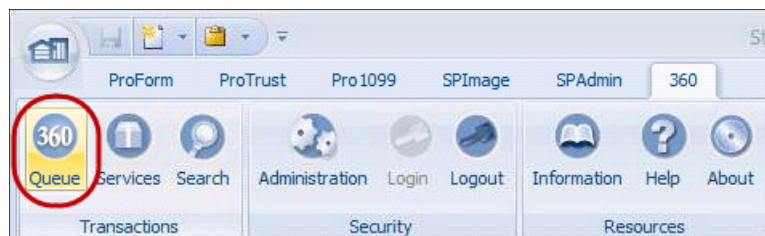


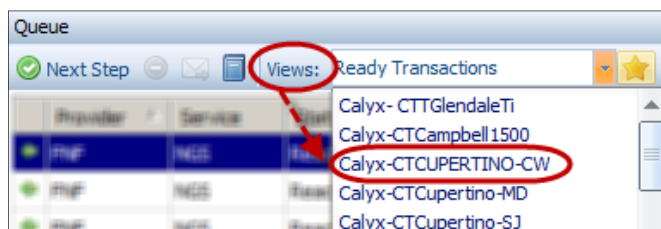
Accepting Orders in SoftPro Select

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

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



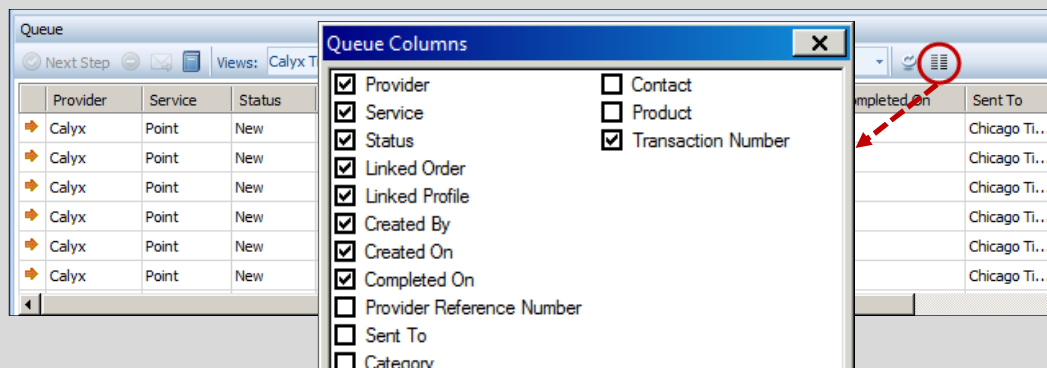
3. From the **Views** drop-down, select your **Saved View** (if you do not have a Calyx saved View, refer to [SoftPro 360 CALYX – Creating a Saved View in SPS](#))



Your Queue populates with all Calyx transactions for your Branch.

Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On	Completed On	Sent To	Description
Calyx	Point	New			tamika@com...	7/17/2015 9:...		Chicago Ti...	James, Nicole, 852 J. Street Cupertino, CA, Escrow
Calyx	Point	New			tamika@com...	7/17/2015 9:...		Chicago Ti...	James, Nicole, 852 J. Street Cupertino, CA, Title
Calyx	Point	New			crystal.grang...	6/19/2015 3:...		Chicago Ti...	Buyer, Test, 23 Jam St Durham, NC, Title
Calyx	Point	New			tamika@com...	6/10/2015 9:...		Chicago Ti...	Smith, Carrie, 22 Sample Lane Livermore, CA, Title
Calyx	Point	New			tamika@com...	5/29/2015 1:...		Chicago Ti...	test, I, 145 Test Way Livermore, CA, Escrow
Calyx	Point	New			tamika@com...	5/29/2015 1:...		Chicago Ti...	test, I, 145 Test Way Livermore, CA, Title

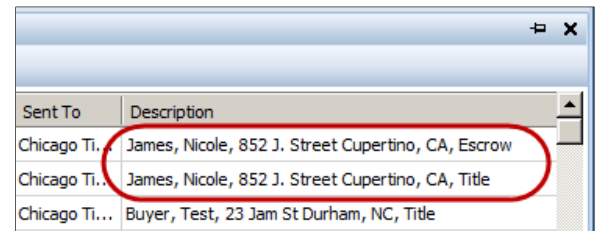
NOTE: Additional data may be added (or removed) by clicking the **Columns** icon. Check the corresponding check box for the information you wish to display (or uncheck to remove a column).



Accepting Orders in SoftPro Select

Each transaction has two entries, (identified in the **Description** field):

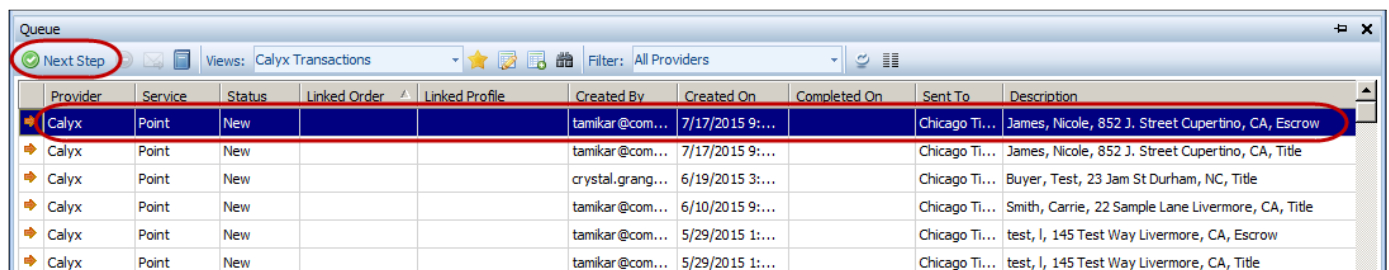
- > Escrow
- > Title



Sent To	Description
Chicago Ti...	James, Nicole, 852 J. Street Cupertino, CA, Escrow
Chicago Ti...	James, Nicole, 852 J. Street Cupertino, CA, Title
Chicago Ti...	Buyer, Test, 23 Jam St Durham, NC, Title

Importing Calyx Data

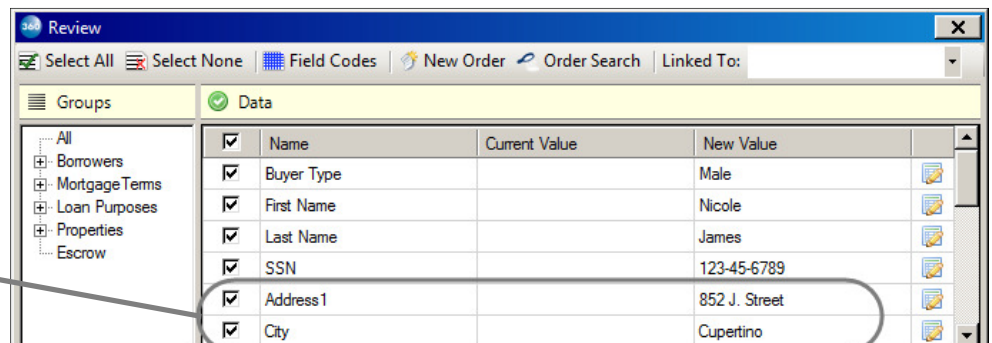
4. Highlight the applicable order
5. Click the **Next Step** button



Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On	Completed On	Sent To	Description
Calyx	Point	New			tamika@com...	7/17/2015 9:...		Chicago Ti...	James, Nicole, 852 J. Street Cupertino, CA, Escrow
Calyx	Point	New			tamika@com...	7/17/2015 9:...		Chicago Ti...	James, Nicole, 852 J. Street Cupertino, CA, Title
Calyx	Point	New			crystal.grang...	6/19/2015 3:...		Chicago Ti...	Buyer, Test, 23 Jam St Durham, NC, Title
Calyx	Point	New			tamika@com...	6/10/2015 9:...		Chicago Ti...	Smith, Carrie, 22 Sample Lane Livermore, CA, Title
Calyx	Point	New			tamika@com...	5/29/2015 1:...		Chicago Ti...	test, I, 145 Test Way Livermore, CA, Escrow
Calyx	Point	New			tamika@com...	5/29/2015 1:...		Chicago Ti...	test, I, 145 Test Way Livermore, CA, Title

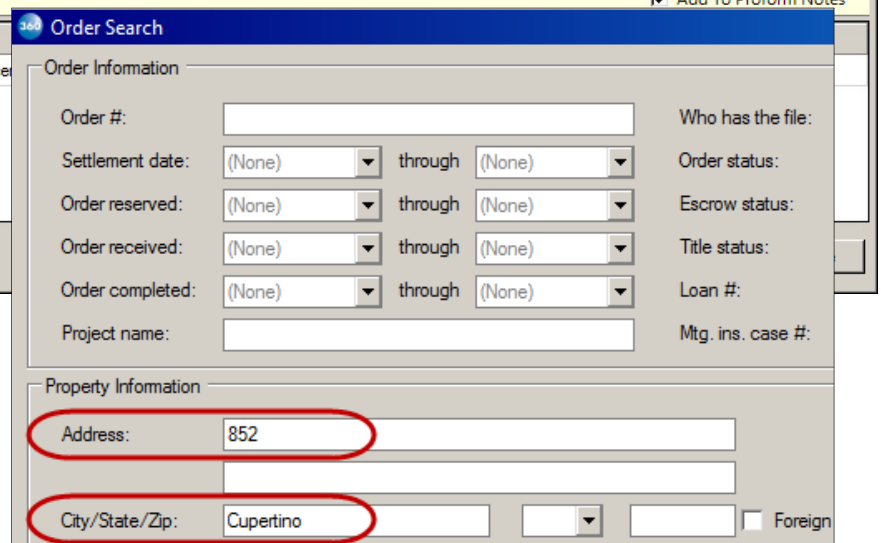
6. From the **Review** window, click the **Order Search** button

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



Name	Current Value	New Value
Buyer Type		Male
First Name		Nicole
Last Name		James
SSN		123-45-6789
Address1		852 J. Street
City		Cupertino

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



Order Search

Order Information

Order #:

Settlement date: (None) through (None)

Order reserved: (None) through (None)

Order received: (None) through (None)

Order completed: (None) through (None)

Project name:

Who has the file:

Order status:

Escrow status:

Title status:

Loan #:

Mtg. ins. case #:

Property Information

Address:

City/State/Zip:

☐ Foreign

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
XOMTR-15-0949	08/27/2015 0...	InProcess		852 J Street	Cupertino	CA	95014	Santa C...		Nicole Jame

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

- a. Click the **Cancel** button

Search Results

Order Number	Settlement Date	Order Status	Project Name	Address	City	State	Zip	County	Lender Name	Buyer Name

◀ ▶

OK Cancel

- b. Close the **Search** window
- c. When on the **Review** screen, click the **New Order** button
- d. From the **New Order** window, select the appropriate templates; click **OK** to open the order

The screenshot shows the 'New Order' dialog box in the software. The 'New Order' button in the top menu bar is circled in red, with a red dashed arrow pointing to the dialog box. The dialog box contains the following fields and options:

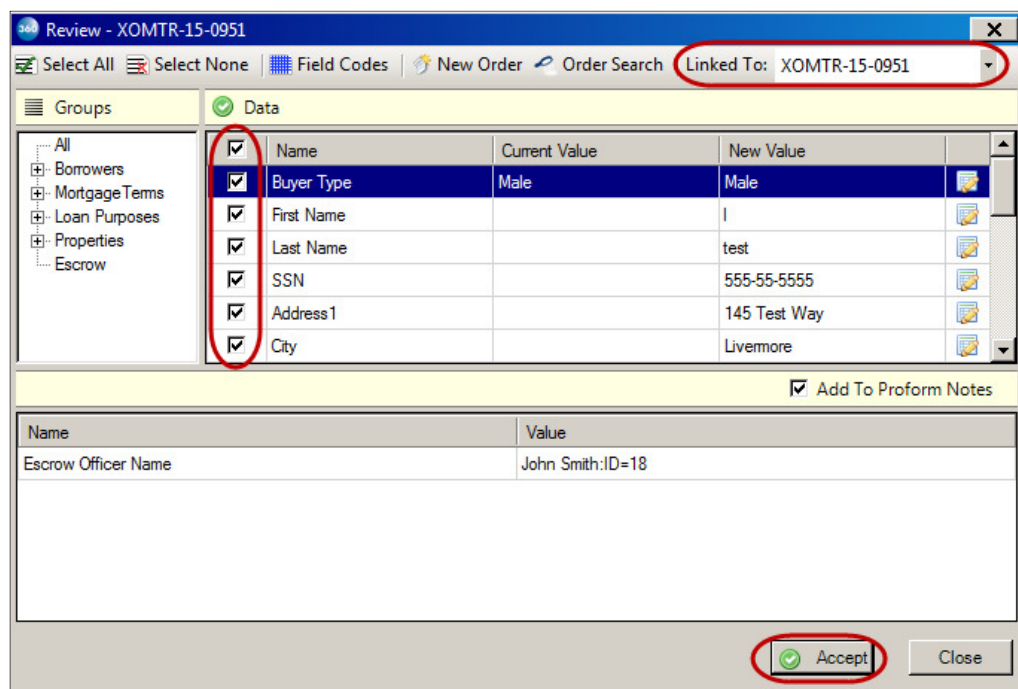
- Prefix:** A dropdown menu.
- Suffix:** A dropdown menu.
- Order number:** A text field containing 'XOMTR-15-0950'.
- Trust account:** A dropdown menu.
- Settlement type:** Radio buttons for 'Closing Disclosure' and 'HUD-1'.
- Orders/Templates to copy:** A section with four navigation buttons (up, down, search, and a fourth button) and a list box containing 'Order/Template' and 'FL-Default'.
- Buttons:** 'OK', 'Cancel', and 'Help' buttons at the bottom.

The Order opens in the background and you are returned to the **Review** screen.

- e. 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



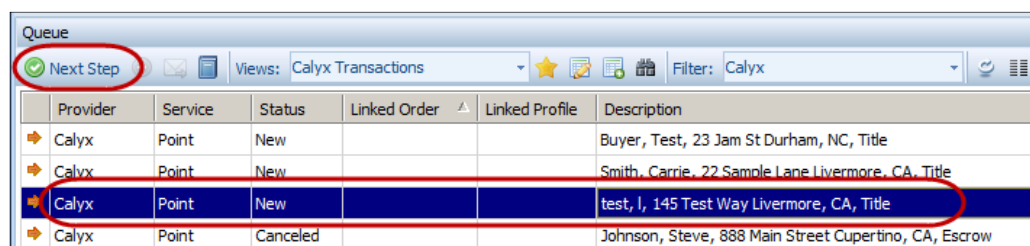
Groups	Data	Name	Current Value	New Value
<input checked="" type="checkbox"/>	Name			
<input checked="" type="checkbox"/>	Buyer Type	Male	Male	
<input checked="" type="checkbox"/>	First Name			I
<input checked="" type="checkbox"/>	Last Name			test
<input checked="" type="checkbox"/>	SSN			555-55-5555
<input checked="" type="checkbox"/>	Address1			145 Test Way
<input checked="" type="checkbox"/>	City			Livermore

☒ Add To Proform Notes

Name	Value
Escrow Officer Name	John Smith:ID=18

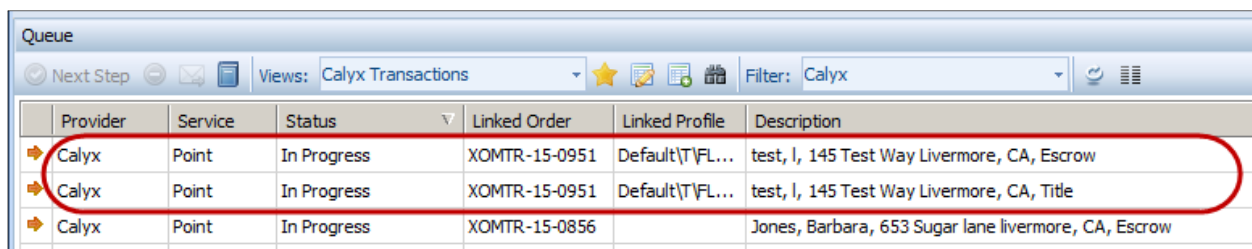
With your SPS Order still open,

13. Click the **Queue** tab
14. Highlight the Title entry
15. Click the **Next Step** button
16. Repeat **Steps 10-12**
17. Save and exit your Order



Provider	Service	Status	Linked Order	Linked Profile	Description
Calyx	Point	New			Buyer, Test, 23 Jam St Durham, NC, Title
Calyx	Point	New			Smith, Carrie, 22 Sample Lane Livermore, CA, Title
Calyx	Point	New			test, I, 145 Test Way Livermore, CA, Title
Calyx	Point	Canceled			Johnson, Steve, 888 Main Street Cupertino, CA, Escrow

The **Queue** now shows the Order as **In Progress** and identifies the SPS Linked Order.



Provider	Service	Status	Linked Order	Linked Profile	Description
Calyx	Point	In Progress	XOMTR-15-0951	Default\T\FL...	test, I, 145 Test Way Livermore, CA, Escrow
Calyx	Point	In Progress	XOMTR-15-0951	Default\T\FL...	test, I, 145 Test Way Livermore, CA, Title
Calyx	Point	In Progress	XOMTR-15-0856		Jones, Barbara, 653 Sugar lane livermore, CA, Escrow