

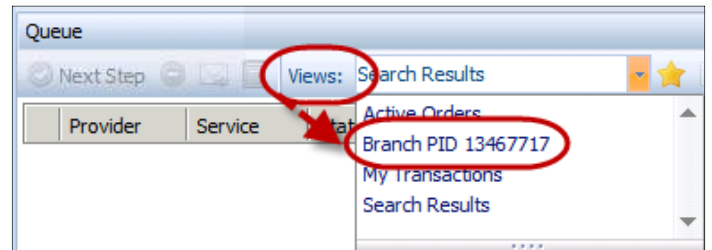
Accepting Orders in SoftPro Select

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

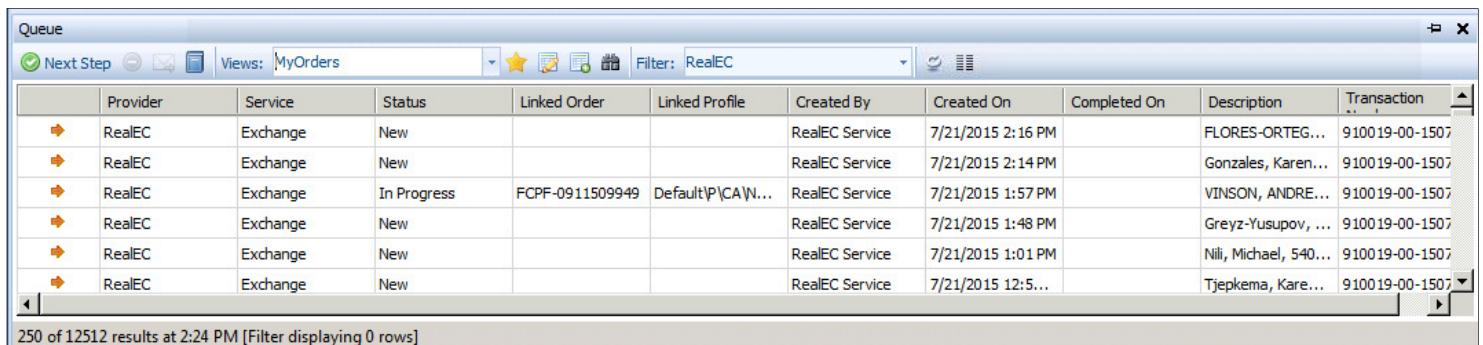
1. From the **360** ribbon, click the **Login** button
2. Once logged in, click the **360 Queue** button



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




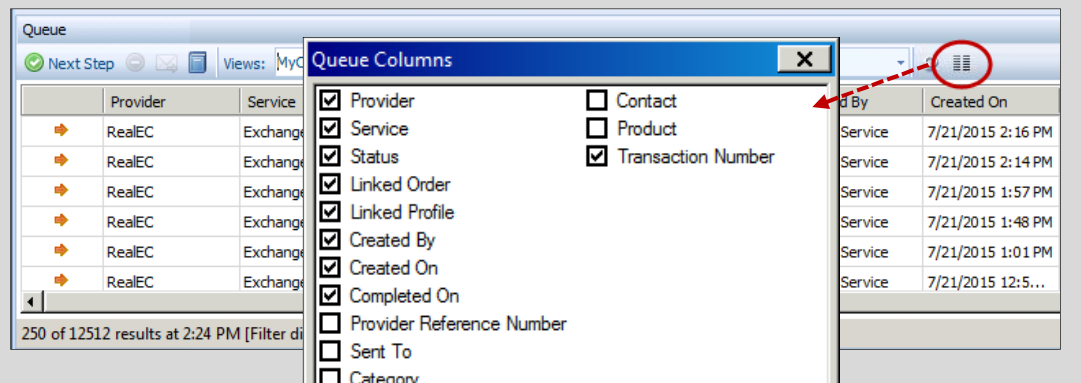
Your Queue populates with all RealEC transactions for your Branch.



	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(P\CA\N...	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		Nili, 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)

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

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

Review

Select All
Select None
Field Codes
New Order
Order Search
Linked To:

Groups
Data

All
Order Data
Properties
Buyers
New Loans
Lenders

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/

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: 999
City/State/Zip: San Jose

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 ...	Sunny...	CA	94086	Santa C...	TBD	Key Sundar

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

- Click the **Cancel** button













Search Results

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

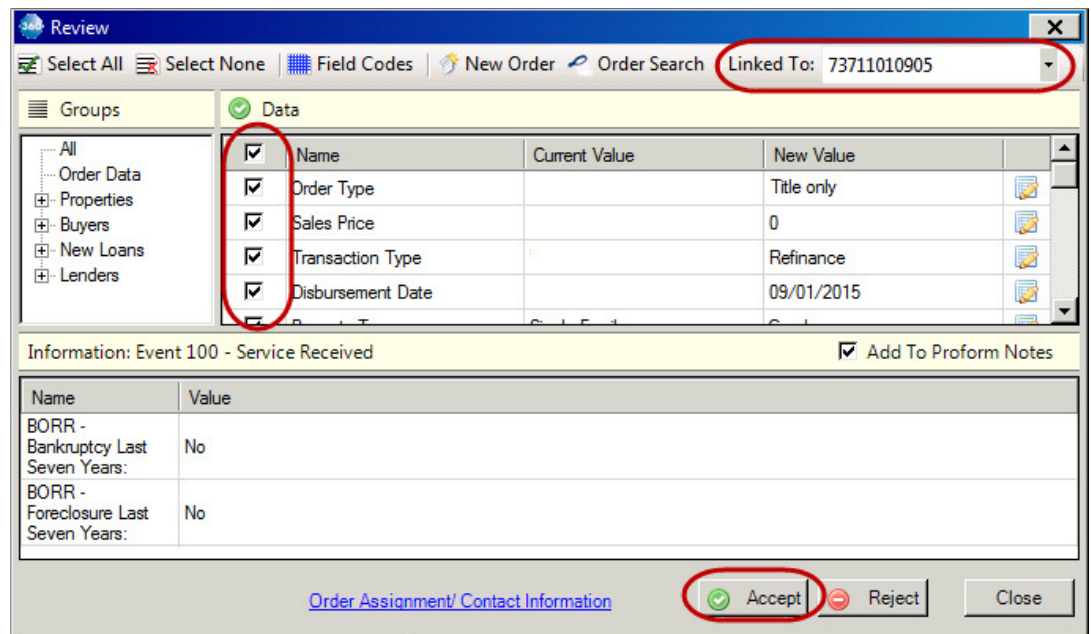
- Close the **Search** window and the **360 Review** window
- When on **SoftPro Start Page**, create a new order
- Save the order, making sure to resolve any warning or error messages
- Click the **Queue** tab
- Click the **Next Step** button

Queue										
<div>  Next Step   Views: Branch PID 13467743    Filter: RealEC   </div>										
		Linked Profile	Created By	Created On	Completed On	Sent To	Description	Event	Product	Trans
	2	Default\PC...	RealEC Service	7/20/2015 9:30 PM		13467743	Fernandez, Luz,...	100 - Service Receiver	29 - Closing and Escrow Services	100
	2	Default\PC...	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, Vij...	29 - Closing and Escrow Services	RealEC Service	9100
			RealEC Service	6/17/2015 10:5...		13467743	Chilakamarry, Vij...	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



Review window showing the 'Linked To' dropdown set to 73711010905. The 'Data' section contains a table with the following data:

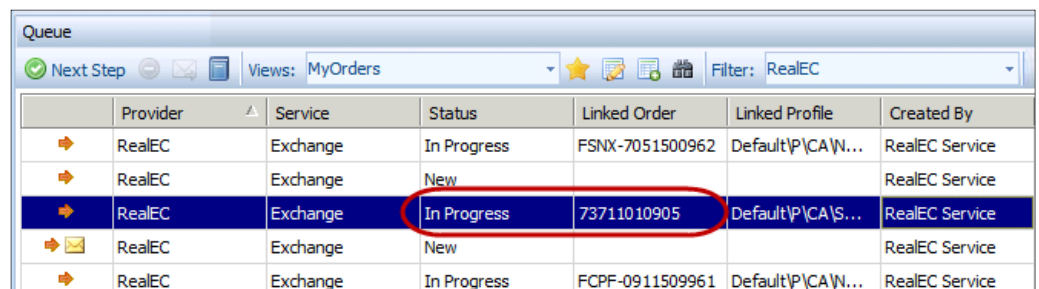
Groups	Data	Current Value	New Value
<input checked="" type="checkbox"/>	Name		
<input checked="" type="checkbox"/>	Order Type		Title only
<input checked="" type="checkbox"/>	Sales Price		0
<input checked="" type="checkbox"/>	Transaction Type		Refinance
<input checked="" type="checkbox"/>	Disbursement Date		09/01/2015

Information: Event 100 - Service Received

Name	Value
BORR - Bankruptcy Last Seven Years:	No
BORR - Foreclosure Last Seven Years:	No

Buttons: [Order Assignment/ Contact Information](#), **Accept**, **Reject**, **Close**

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

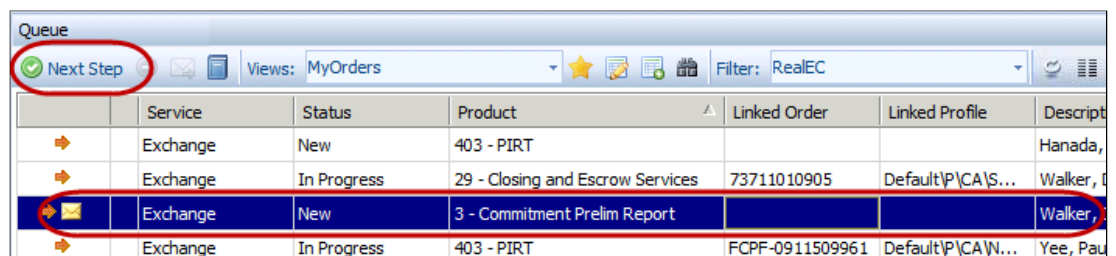


Queue window showing a list of transactions. The 'Next Step' button is highlighted. The table data is as follows:

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

With your SPS Order still open,

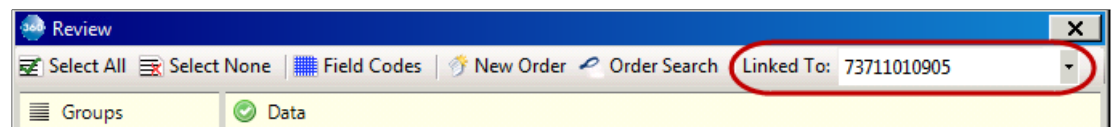
13. Click the **Queue** tab
14. Highlight the Title entry
15. Click the **Next Step** button



Queue window showing a list of transactions. The 'Next Step' button is highlighted. The table data is as follows:

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

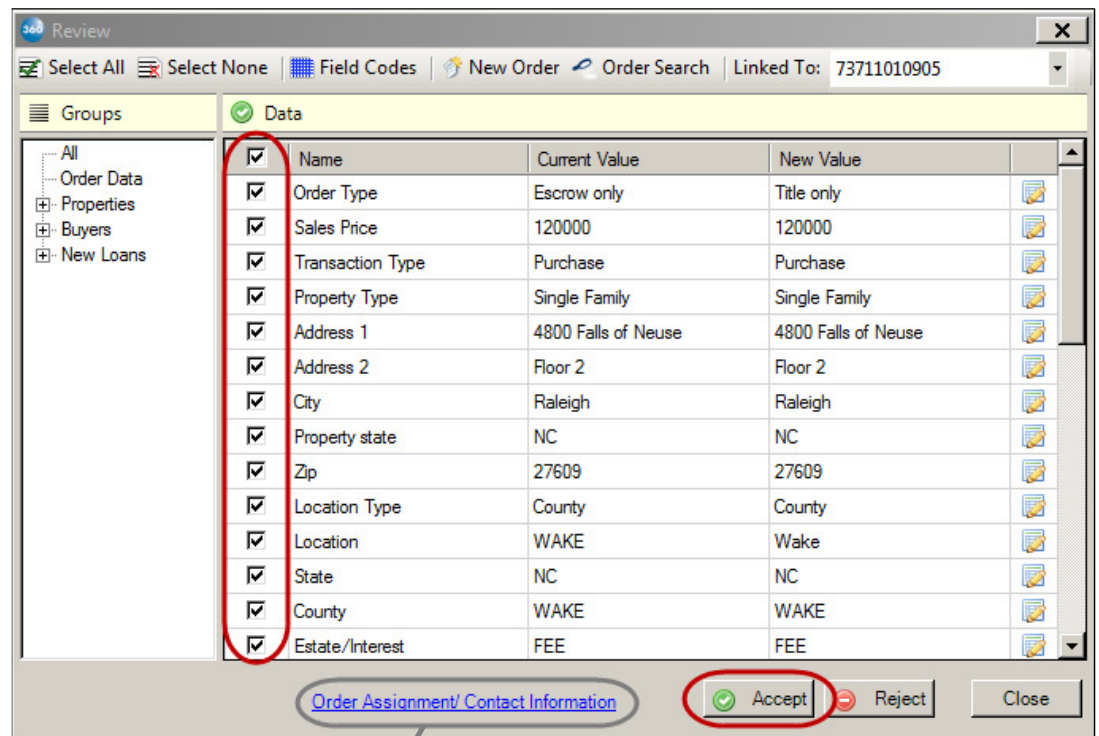
16. In the **Review** window, from the **Linked To** drop-down, select the number of the opened order



Review window showing the 'Linked To' dropdown set to 73711010905.

Accepting Orders in SoftPro Select

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



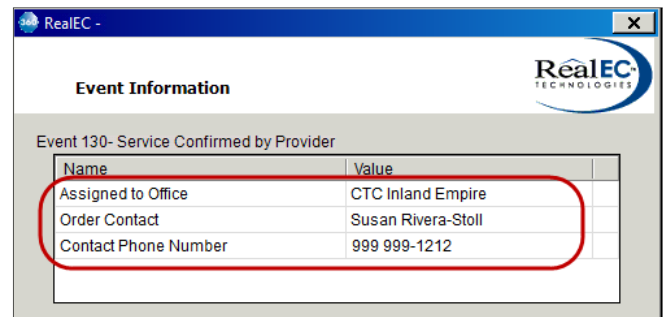
The screenshot shows the 'Review' window in SoftPro 360. The 'Data' section is expanded, and all checkboxes are selected. The 'Accept' button is highlighted with a red circle. A red box highlights the 'Order Assignment/ Contact Information' link at the bottom.

	Name	Current Value	New Value
<input checked="" type="checkbox"/>	Name		
<input checked="" type="checkbox"/>	Order Type	Escrow only	Title only
<input checked="" type="checkbox"/>	Sales Price	120000	120000
<input checked="" type="checkbox"/>	Transaction Type	Purchase	Purchase
<input checked="" type="checkbox"/>	Property Type	Single Family	Single Family
<input checked="" type="checkbox"/>	Address 1	4800 Falls of Neuse	4800 Falls of Neuse
<input checked="" type="checkbox"/>	Address 2	Floor 2	Floor 2
<input checked="" type="checkbox"/>	City	Raleigh	Raleigh
<input checked="" type="checkbox"/>	Property state	NC	NC
<input checked="" type="checkbox"/>	Zip	27609	27609
<input checked="" type="checkbox"/>	Location Type	County	County
<input checked="" type="checkbox"/>	Location	WAKE	Wake
<input checked="" type="checkbox"/>	State	NC	NC
<input checked="" type="checkbox"/>	County	WAKE	WAKE
<input checked="" type="checkbox"/>	Estate/Interest	FEE	FEE

Buttons: [Order Assignment/ Contact Information](#), **Accept**, **Reject**, **Close**

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



The screenshot shows the 'Event Information' window in RealEC. The 'Event 130- Service Confirmed by Provider' section is highlighted. A red box highlights the 'Assigned to Office', 'Order Contact', and 'Contact Phone Number' fields.

Name	Value
Assigned to Office	CTC Inland Empire
Order Contact	Susan Rivera-Stoll
Contact Phone Number	999 999-1212