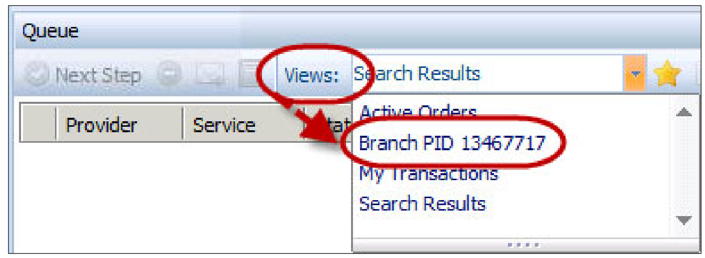
Accepting Orders in SoftPro Select

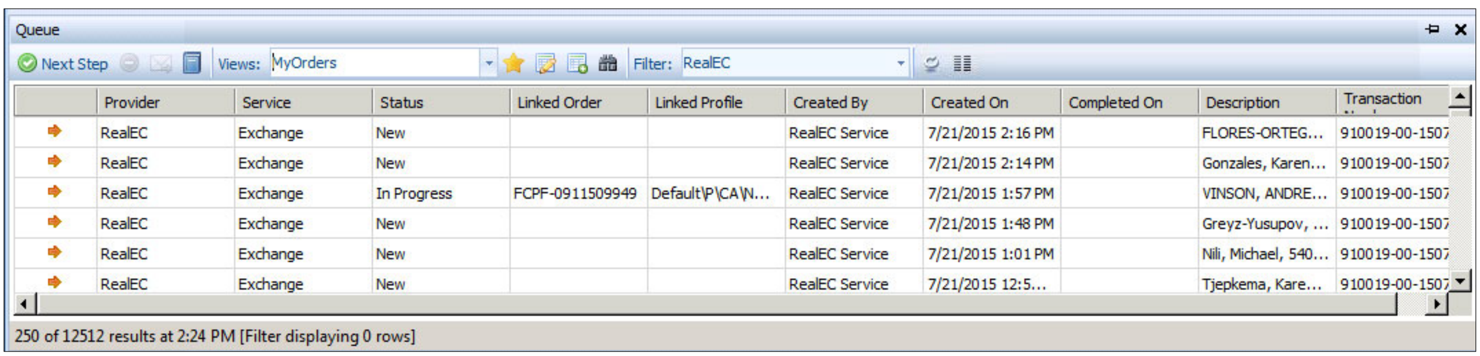
Follow these steps to accept the RealEC order into your SoftPro Select order.

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*)



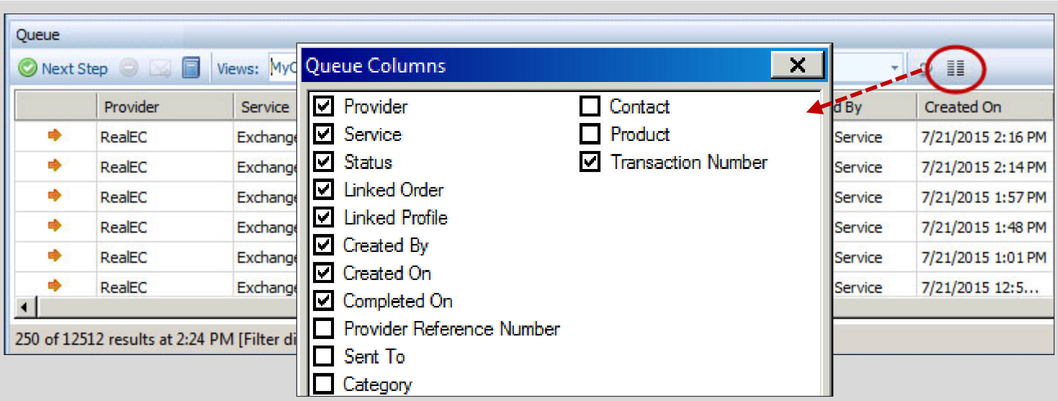
Your Queue populates with all RealEC transactions for your Branch.



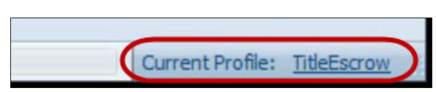
	Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On	Completed On	Description	Transaction
	RealEC	Exchange	New			RealEC Service	7/21/2015 2:16 PM		FLORES-ORTEG...	910019-00-1507
	RealEC	Exchange	New			RealEC Service	7/21/2015 2:14 PM		Gonzales, Karen...	910019-00-1507
	RealEC	Exchange	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).



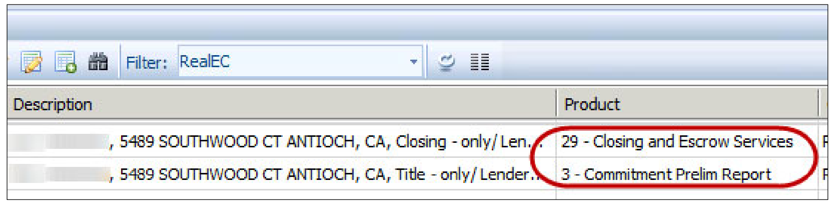
4. From the **Description** column, locate the order you wish to work on
5. Verify your **Current Profile** = **TitleEscrow**



Importing RealEC Data

Each transaction has two entries:

- Escrow = **29 - Closing and Escrow Services**
- Title = **3 - Commitment Prelim Report**



With the Escrow entry highlighted in the grid,

6. Click the **Next Step** button

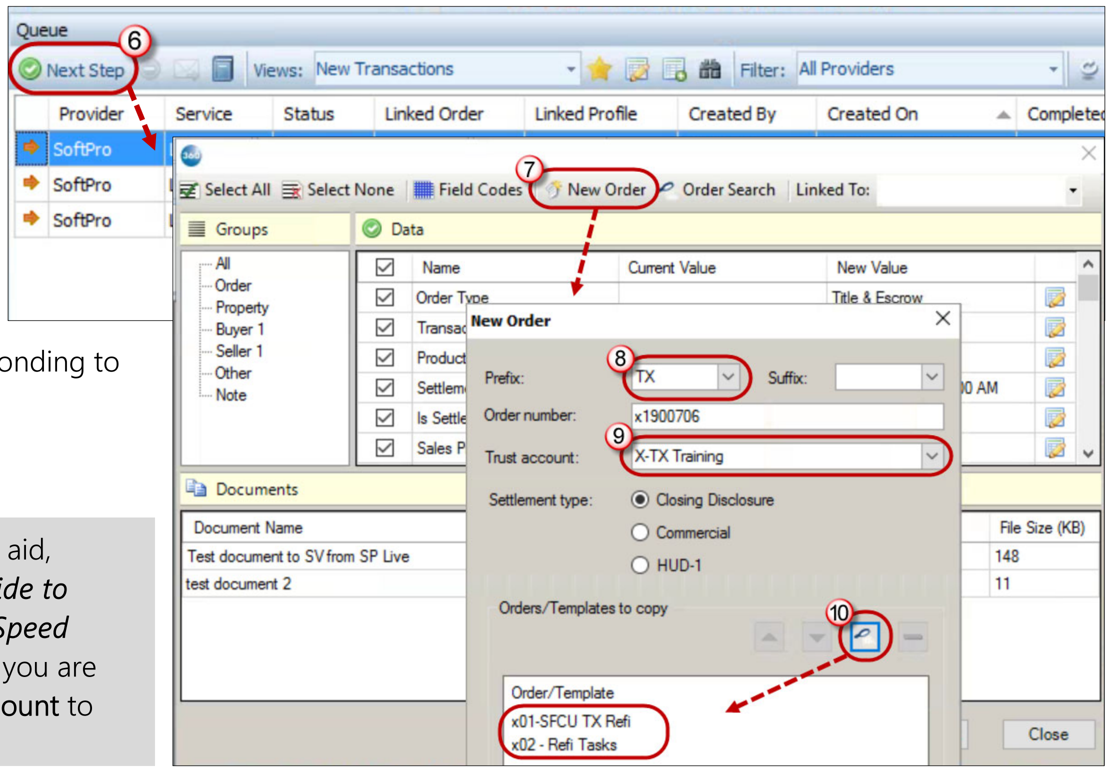
The **Review** window appears showing the order data.

7. Click the **New Order** button

From the **New Order** window,

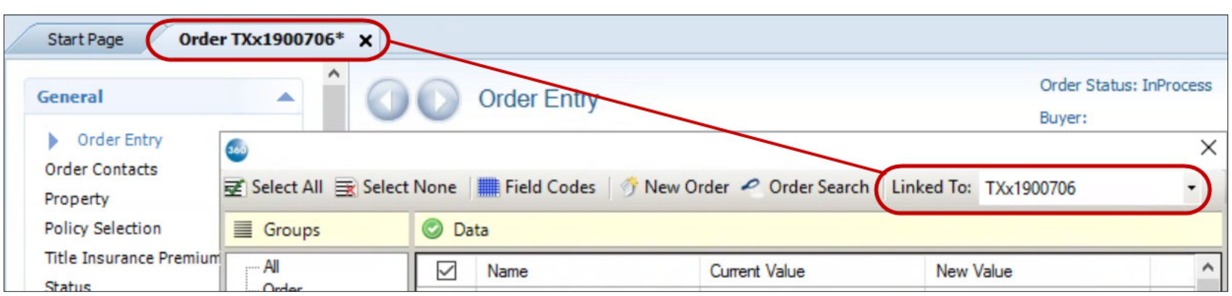
8. Select the **Prefix** corresponding to the property state
9. Select the **Trust account**

> NOTE: Refer to the job aid, *Reference Guide – Guide to Selecting the Correct Speed Code/Trust Account* if you are unsure which **Trust account** to select.



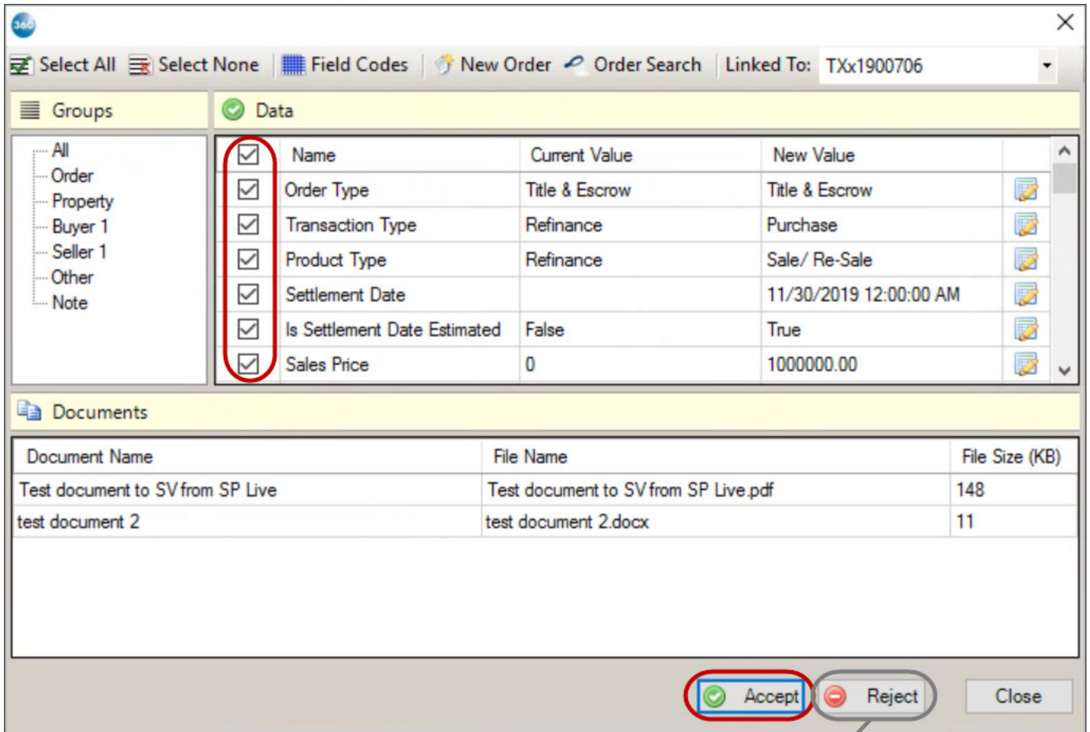
10. Click the **Search** button to search for and select the applicable 01 transaction and 02 Task template(s)
11. Click the **OK** button to generate the order

Your new order opens in the background and links to the Lender's order.



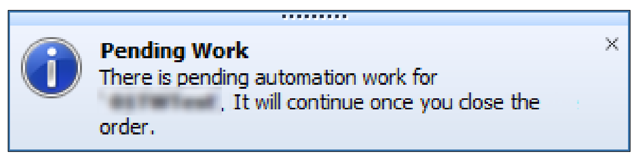
With the **Review** window still open,

12. Verify data you wish to pull into your order
13. Uncheck the check box(es) for data you do not wish to import
14. Click the **Accept** button to apply the incoming order details and publish any documents to smartVIEW



NOTE: The **Reject** button prohibits the ability to create a new order and prompts you to enter a reason for the cancellation. A message is sent to the Lender citing the reason entered.

You may see the **Pending Work** message display in the lower right corner. The message states: **There is pending automation work for '*your order number*'. It will continue once you close the order.**

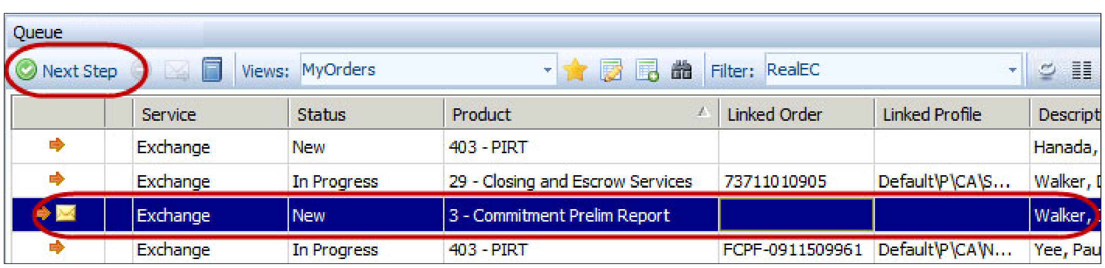


The automated process continues once you exit the order.

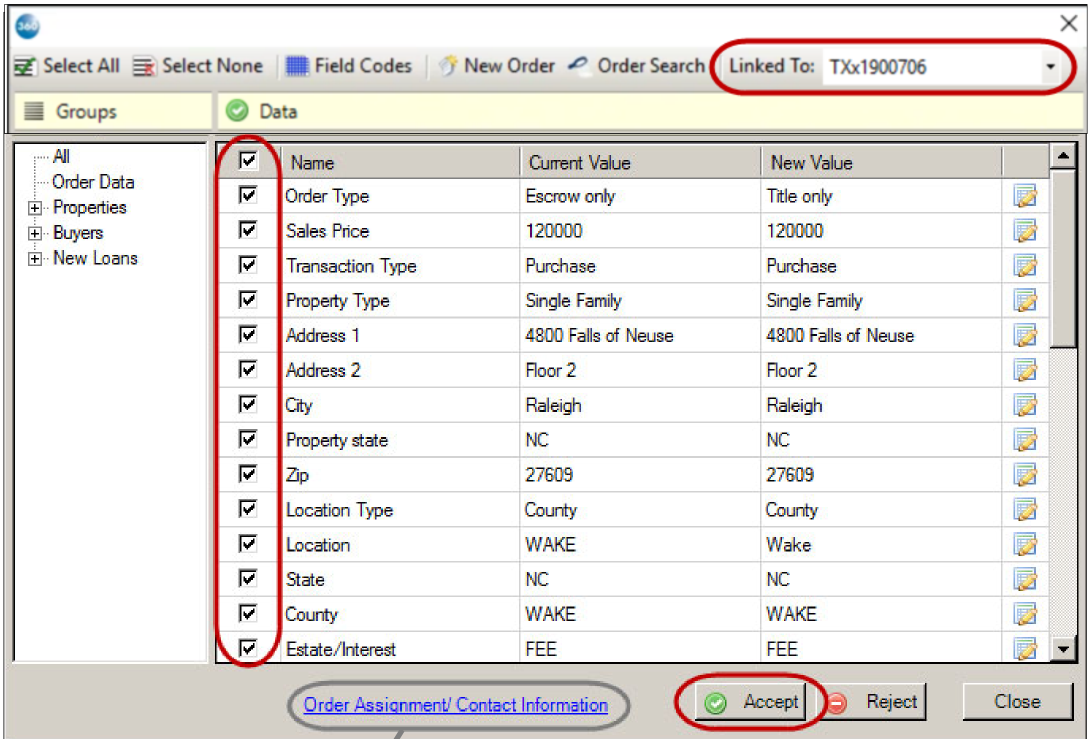
15. **Save** the order

With your SPS Order still open,

16. Click the **Queue** tab
17. Highlight the Title entry
18. Click the **Next Step** button

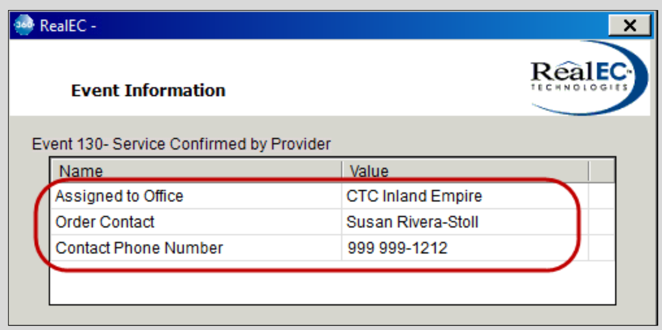


19. In the **Review** window, from the **Linked To** drop-down, select the number of the opened order
20. Check (or uncheck) all applicable check boxes in the **Data** section
21. Click the **Accept** button



NOTE: If you have not already done so, enter the **Office Assignment/Contact Information**. Once entered, the information 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



22. **Save** and **Exit** the order; this allows the automation process to continue