Creating and Applying an Order Template

If you enter Contacts, phrases, charges, etc. in your SoftPro Select orders on a day-to-day basis, adding them to an order template is a convenient way to minimize the data entry. Follow these steps to create, and then apply an order template.

Creating a Template

1. From the **New Order** drop-down, select **New Template**

From the **New Template** window,

2. In the **Template name** field, enter the name of your template following your Operation's guidelines

   Example format:

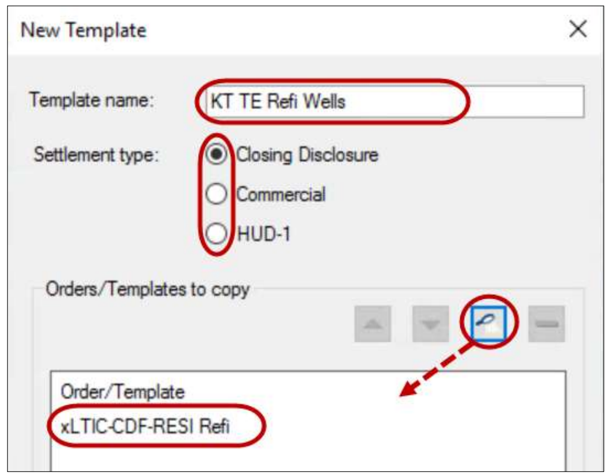
   [your initials] [EO, TE, TO] [Sale, Refi] [company name]

   KT TE Refi Wells

3. Verify the **Settlement Type**

4. Click the Search icon to search for and add the Sale or Refi template

5. Click **OK**



IMPORTANT! If you use an existing order as a template (versus the Sale or Refi template mentioned above) to create the new template you must clear the **smartview Order ID** field to allow the creation of the smartview order when opening a new Select order with the newly created template.

If you are **not** using an existing order you can **skip to step 12**.

6. Navigate to the **Order Information** screen
7. Click the **Custom Fields** more/less bar to expand

NOTE: If you do not have access to the **Custom Fields** section,

1. On the **Order** ribbon, click the **My Screens** button
2. Select the **SoftPro Screens**
3. Click **OK**

The **Custom Fields** section should now be accessible along with the **smartVIEW Order ID** field.

8. In the **Search** field, enter *smartview*; press the **Enter** key

9. Click in the **Value** field of the **smartVIEW Order ID** entry
10. Press the **F2** key to clear the value shown

11. If applicable, change your **My Screens** setting back to your typical setting
12. Enter the items you wish to add to the template (Contacts, phrases, fees, charges, etc.)

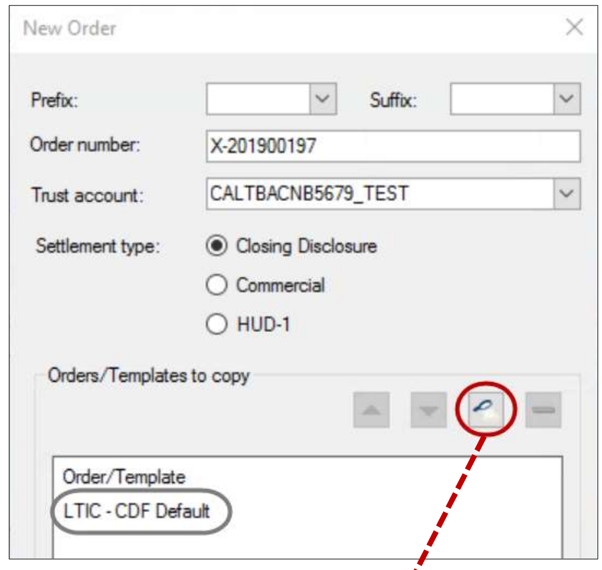
NOTE: The following Contacts are maintained in the Default template - **DO NOT** add them to your template.
- **A**-Settlement Agent
- **T**-Title Company
- **U**-Underwriter

13. Save and exit the template

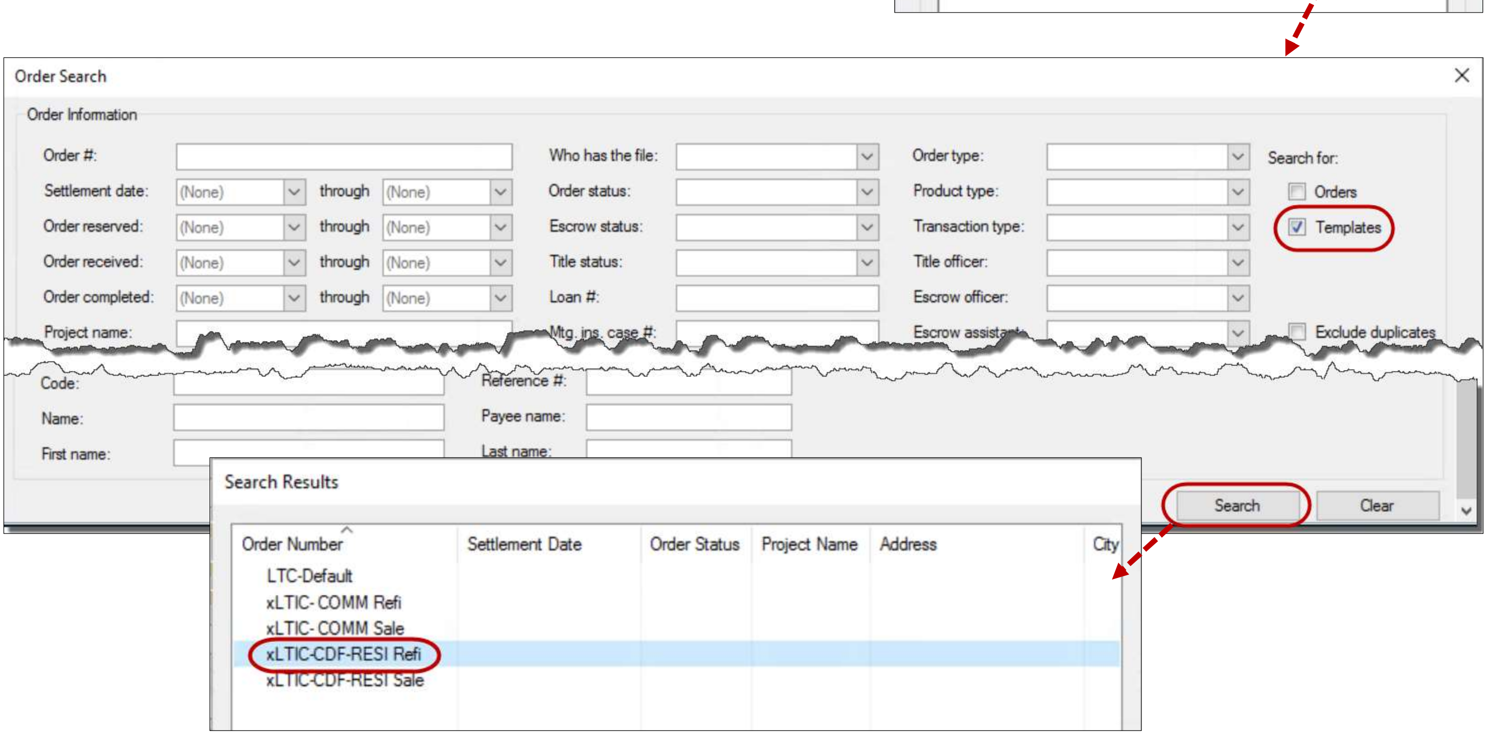
First in wins!

When applying multiple order templates, remember the rule: first in wins! Meaning that all the templates are applied, but the information in the first template takes precedence over the information in the next template, and so on. Follow these steps to apply order template(s).

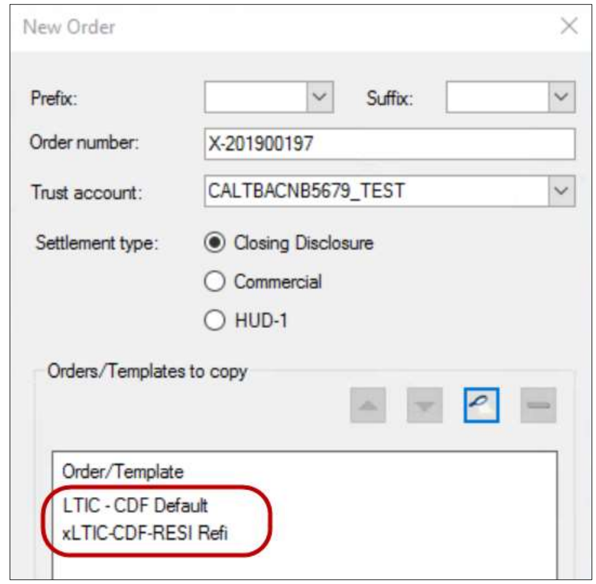
Applying Templates When Creating an Order



1. Create a new order
2. Allow the **Default** template
3. Click the **Search** icon to search for the transaction-type template
4. In the **Order Search** window, the default **Search for** setting is set to search for **Templates**; click the **Search** button
5. From the **Search Results** window, select the transaction-type template; click **OK**



Because the **Default** template is first, its order details take precedence over the transaction-type template.

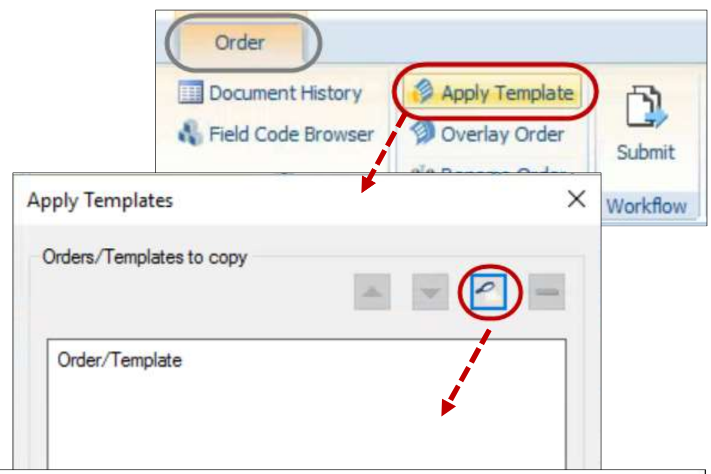


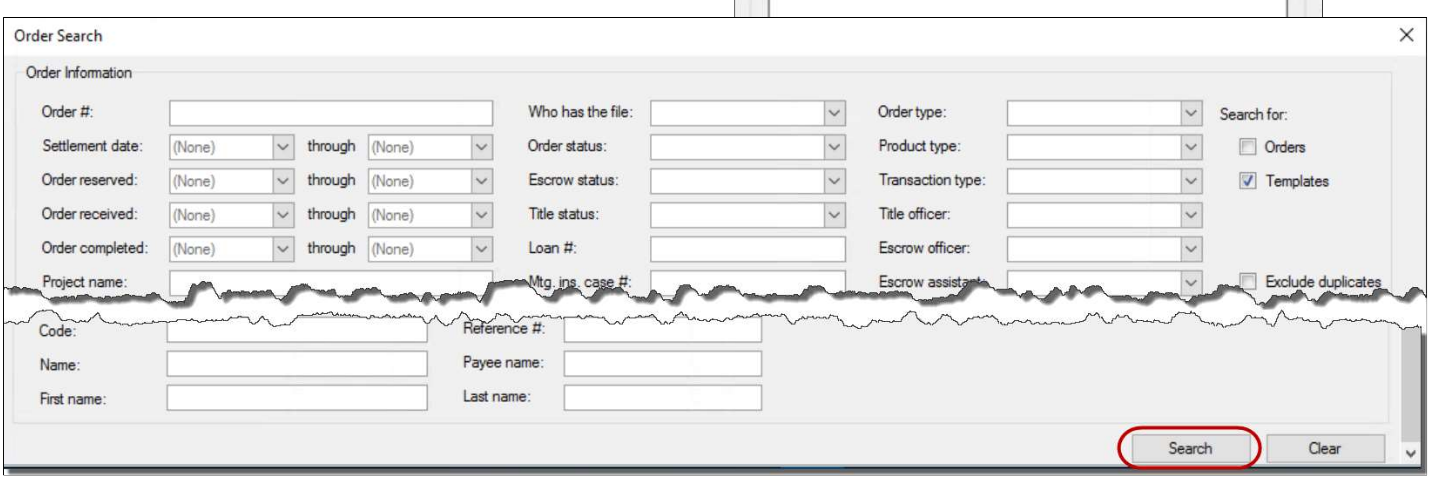
Applying Templates after Creating an Order

1. From the **Order** ribbon, click **Apply Template**

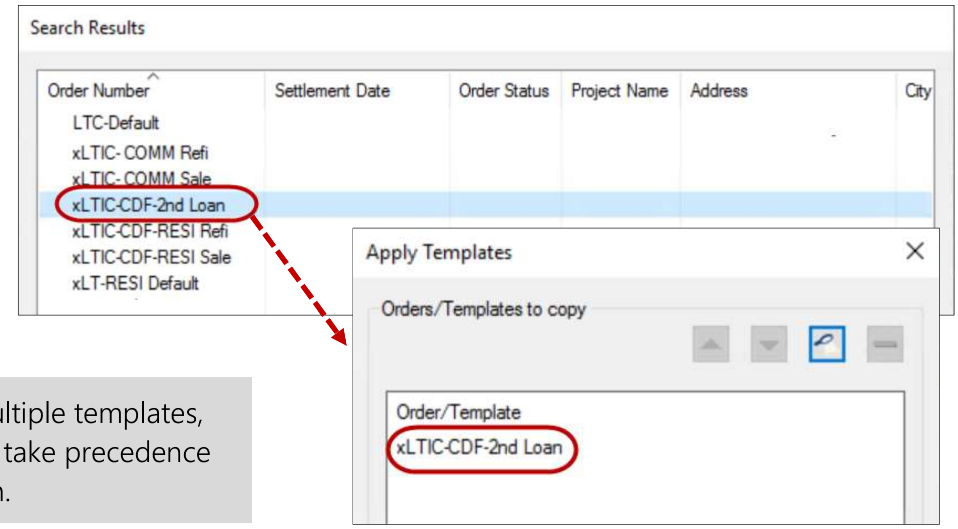
2. Click the **Search** icon to search for the additional template

3. In the **Order Search** window, click the **Search** button





4. Double-click the additional template you wish to apply



5. Click the **OK** button

REMEMBER: When applying multiple templates, the first template's order details take precedence over the one below it, and so on.