

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**

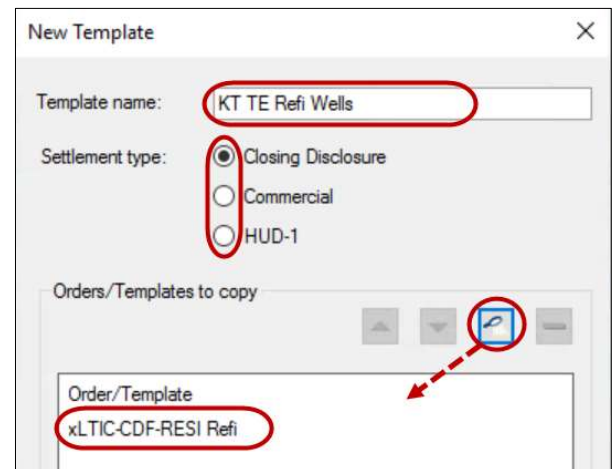


From the **New Template** window,

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

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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

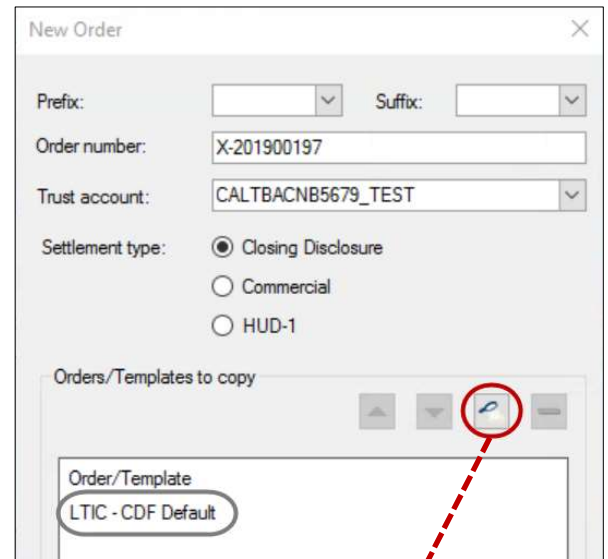
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First in wins!

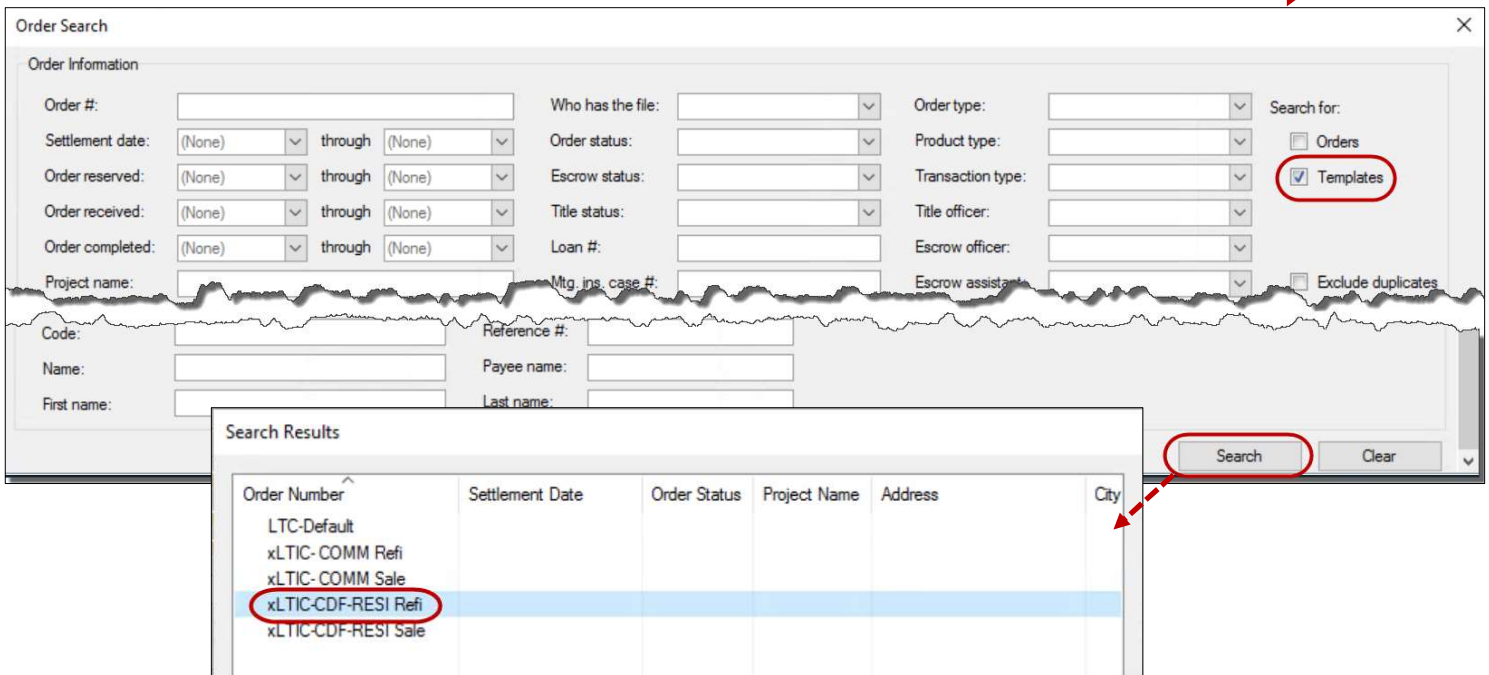
When applying multiple order templates, remember the rule: first in wins! Meaning that all the templates are applied, but the information in the first template takes precedence over the information in the next template, and so on. Follow these steps to apply order template(s).

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**



The 'New Order' window shows fields for Prefix, Suffix, Order number (X-201900197), Trust account (CALTACNB5679_TEST), and Settlement type (Closing Disclosure selected). Below these is a section 'Orders/Templates to copy' with a search icon circled in red. A red dashed arrow points from this icon to the 'Search' button in the 'Order Search' window below.



The 'Order Search' window contains various filters for Order Information, Order status, Escrow status, Title status, Loan #, Mtg. ins. case #, Order type, Product type, Transaction type, Title officer, Escrow officer, and Escrow assistant. The 'Search for' dropdown is set to 'Templates' (circled in red). The 'Search' button is also circled in red. A red dashed arrow points from the 'Search' button to the 'Search Results' window below.

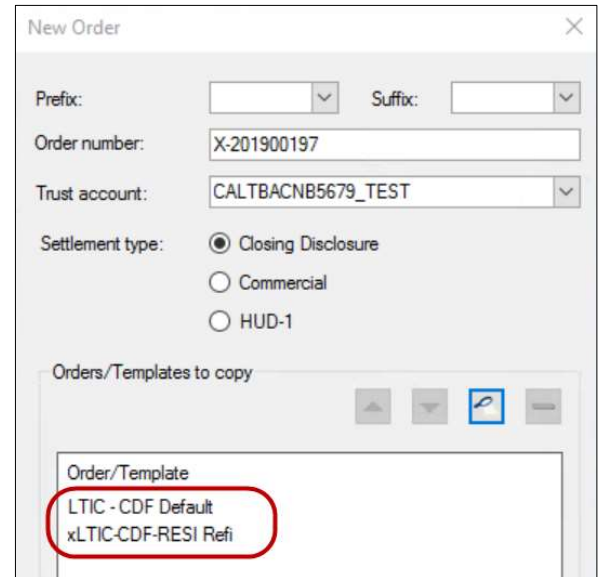
The 'Search Results' window displays a table of search results:

Order Number	Settlement Date	Order Status	Project Name	Address	City
LTC-Default					
xLTIC- COMM Refi					
xLTIC- COMM Sale					
xLTIC-CDF-RESI Refi					
xLTIC-CDF-RESI Sale					

The row 'xLTIC-CDF-RESI Refi' is highlighted in blue and circled in red.

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

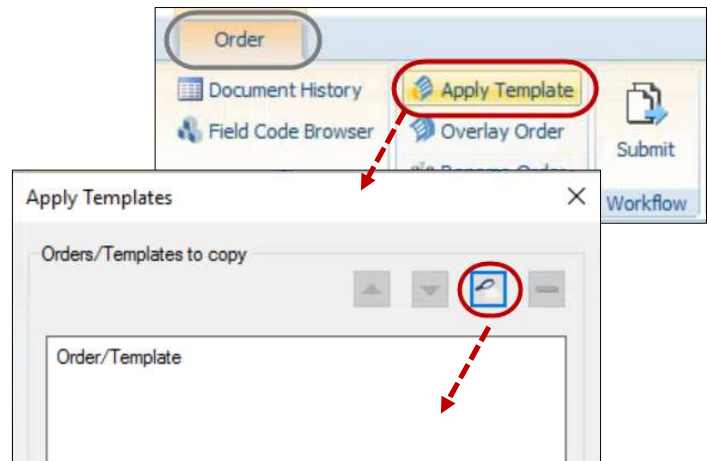


The 'New Order' dialog box contains the following fields and options:

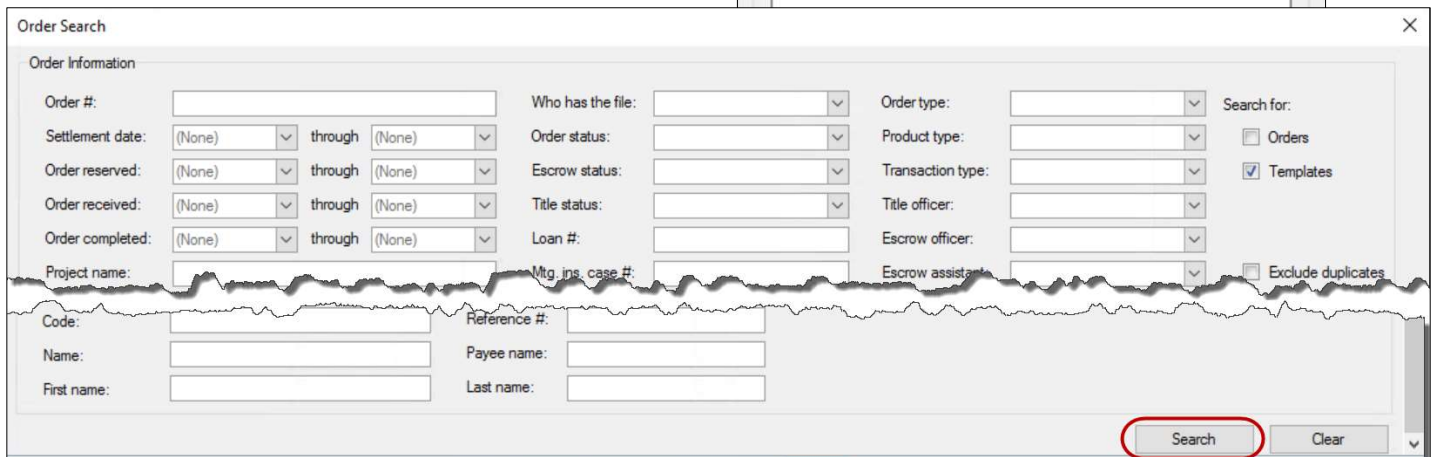
- Prefix: [Dropdown]
- Suffix: [Dropdown]
- Order number: X-201900197
- Trust account: CALTBACNB5679_TEST
- Settlement type:
 - ☒ Closing Disclosure
 - ☐ Commercial
 - ☐ HUD-1
- Orders/Templates to copy: [List Box]
 - Order/Template
 - LTIC - CDF Default
 - xLTIC-CDF-RESI Refi

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



The 'Order' ribbon shows the 'Apply Template' button circled in red. Below it, the 'Apply Templates' dialog box is shown with the 'Search' icon circled in red.



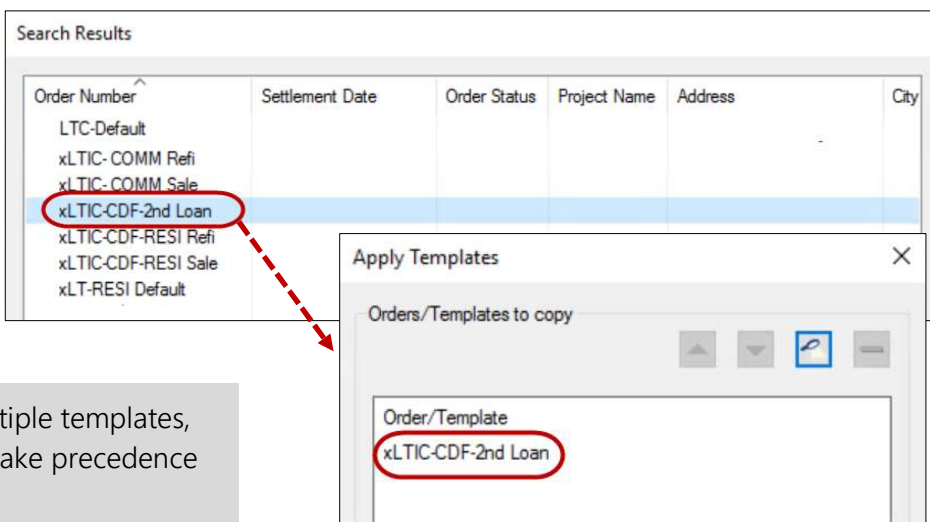
The 'Order Search' dialog box contains the following sections:

- Order Information:**
 - Order #: [Text]
 - Settlement date: (None) through (None)
 - Order reserved: (None) through (None)
 - Order received: (None) through (None)
 - Order completed: (None) through (None)
 - Project name: [Text]
- Who has the file:** [Dropdown]
- Order status:** [Dropdown]
- Escrow status:** [Dropdown]
- Title status:** [Dropdown]
- Loan #:** [Text]
- Mtg. ins. case #:** [Text]
- Order type:** [Dropdown]
- Product type:** [Dropdown]
- Transaction type:** [Dropdown]
- Title officer:** [Text]
- Escrow officer:** [Text]
- Escrow assistant:** [Text]
- Search for:**
 - ☐ Orders
 - ☒ Templates
 - ☐ Exclude duplicates

At the bottom, there is a **Search** button circled in red and a **Clear** button.

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- Double-click the additional template you wish to apply



Search Results

Order Number	Settlement Date	Order Status	Project Name	Address	City
LTC-Default					
xLTIC-COMM Refi					
xLTIC-COMM Sale					
xLTIC-CDF-2nd Loan					
xLTIC-CDF-RESI Refi					
xLTIC-CDF-RESI Sale					
xLT-RESI Default					

Apply Templates

Orders/Templates to copy

Order/Template

xLTIC-CDF-2nd Loan

- 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.