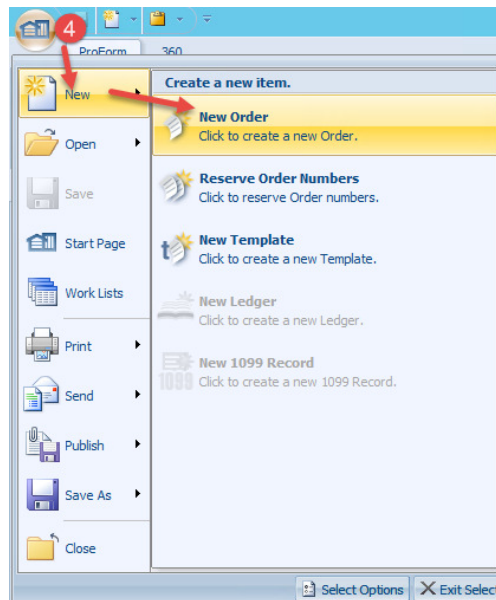
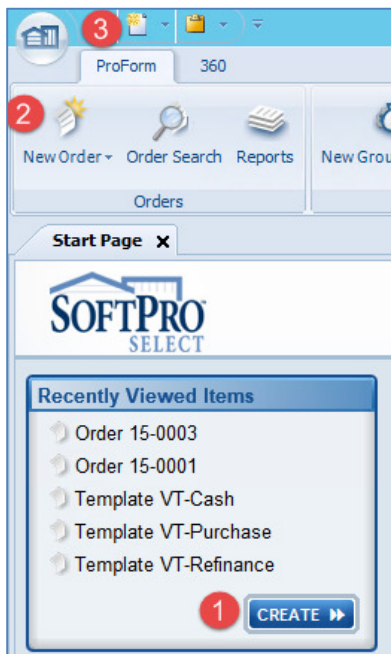


## Opening New Orders

A new order can be opened up any one of five (5) ways. You can:

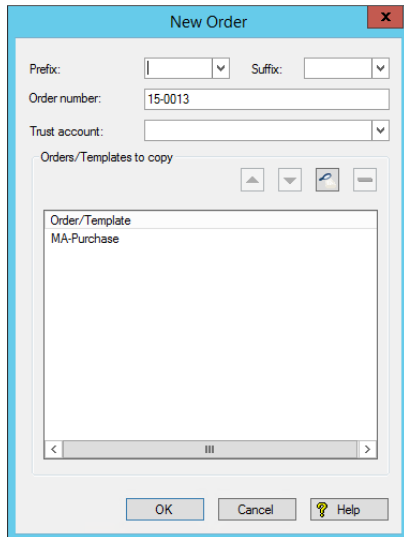
1. Use the **CREATE** button in the Recently Viewed Items
2. Select the New Order icon in the ribbon
3. Select the New icon in the quick access toolbar
4. Select the home button and select the New icon
5. Using the keyboard shortcut **Ctrl + N**





SoftPro Select Keyboard Shortcuts	
Keystroke	Description
Shift + F (A)	Searching Wildcard, used either before or aft
Ctrl + E	Expand screen in flow text fields
Ctrl + N	Create New Order ←
Ctrl + S	Save
Ctrl + T	Create New Template
Ctrl + D	Opens Documents Tab

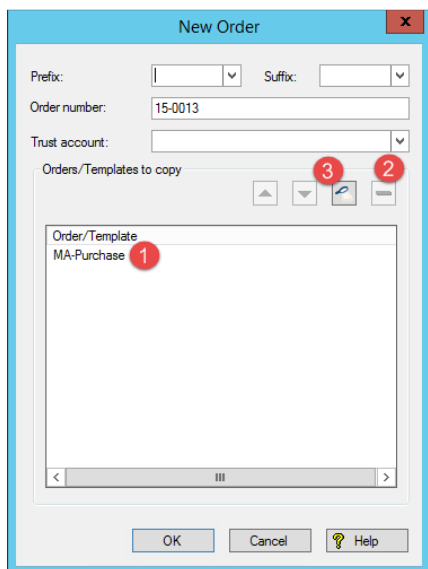
5

A New Order window will appear on the screen:



If the defaulted template (typically the state's Purchase Transaction template) is appropriate for the order click OK to proceed.

If the order is a Cash or Refinance transaction we'll need to change the template. Click the template (1) and use the  icon to remove the defaulted template (2). Now you can Search for a different template by selecting the  (3) located in the "Order/Templates to copy" box.



This will bring up the Order Search screen:

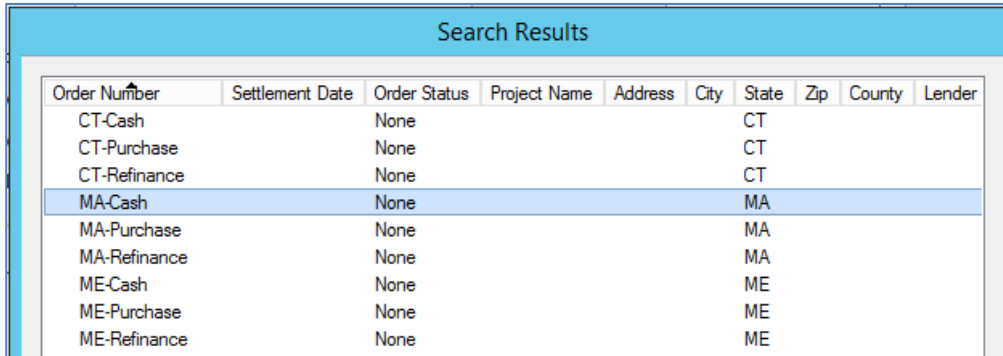
The screenshot shows the 'Order Search' window with the following sections:

- Order Information:** Includes fields for Order #, Settlement date, Order reserved, Order received, Order completed, Project name, Who has the file, Order status, Escrow status, Title status, Loan #, and Mtg. ins. case #.
- Property Information:** Includes Address, City/State/Zip, County, APN/Parcel ID, Lot, Subdivision/Tract, Block, Section, Unit, Tax/Map ID, Phase, Building, Brief legal desc, Book, Page, Map reference, and Recorded.
- Title Information:** Includes Policy # and Commitment #.
- Contact Information:** Includes Contact type, Code, Name, First name, Reference #, Payee name, and Last name.

At the bottom right, there are two buttons: 'Search' (highlighted with a red box) and 'Clear'.

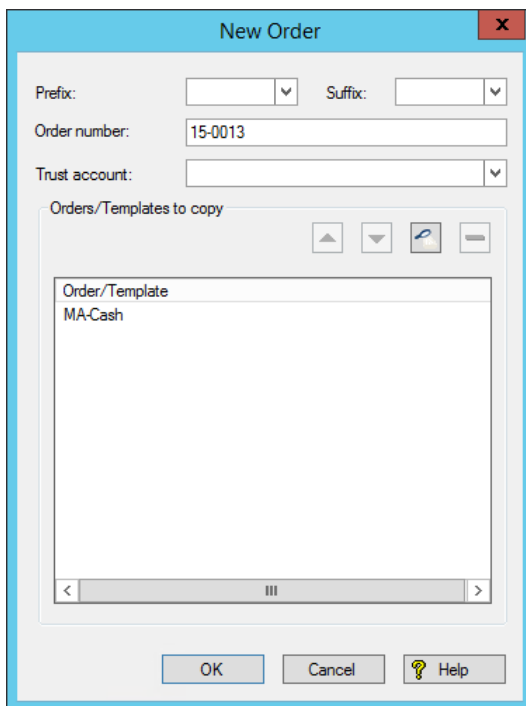
Select the **Search** button.

A list of templates will appear in the search results window. Double-click the appropriate template.



Order Number	Settlement Date	Order Status	Project Name	Address	City	State	Zip	County	Lender
CT-Cash		None				CT			
CT-Purchase		None				CT			
CT-Refinance		None				CT			
MA-Cash		None				MA			
MA-Purchase		None				MA			
MA-Refinance		None				MA			
ME-Cash		None				ME			
ME-Purchase		None				ME			
ME-Refinance		None				ME			

The New Order window will appear with the name of the template populated into the box



New Order

Prefix:  Suffix:

Order number: 15-0013

Trust account:

Orders/Templates to copy

Order/Template  
MA-Cash

OK Cancel Help

If the OK button is greyed out, you will have to select any relevant Prefix or Suffix from the drop down menus.

Click OK to create the order.

Once a tab with the order number appears on the screen, the file is opened.

