SOFTPRO[®] Lite

- 4800 Falls of Neuse Road, Suite 400
- Raleigh, NC 27609
- Support: 800-313-0085
- Email: Support@softprolite.com
- Web: www.SoftProLite.com

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 + ((^) -	Searching Wildcard, used either before or a			
L	L A DOLUM No/INCLUM			
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			



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	New Order X
Prefix:	✓ Suffix: ✓
Order number: 15	5-0013
Trust account:	×
Orders/Templates to co	
Order/Template	
MA-Purchase	ш
	OK Cancel 💡 Help

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.

	New Order
Prefix: Order number:	5-0013
Trust account:	
Order/Template MA-Purchase	
<	III >
	OK Cancel 💡 Help



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This will bring up the Order Search screen:

			Ord	der Search				x
Order Information								
Order #:				Who has the file:		~	Search for:	
Settlement date:	(None)	✓ through	(None) 🗸	Order status:		~	Orders	
Order reserved:	(None)	✓ through	(None) 🗸	Escrow status:		~	Templates	
Order received:	(None)	✓ through	(None) 🗸	Title status:		~		
Order completed:	(None)	✓ through	(None) 🗸	Loan #:				
Project name:				Mtg. ins. case #:				
Property Information								
Address:					Book:			
City/State/Zip:			· ·	Foreign	Page:			
County:					Map reference:			
APN/Parcel ID:					Recorded:	(None)	×	
Lot:			Subdivision/Trac	t:	through	(None)	~	
Block:			Section:		Unit:			
Tax/Map ID:			Phase:		Building:			
Brief legal desc:								
Title Information								
Policy #:			Com	mitment #:				
Contact Information								
Contact type:			~					
Code:			Ref	erence #:				
Name:			Pay	ee name:				
First name:			Last	name:				
						Search	Clear	

Select the Search button.



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

Search Results									
Order Number	Settlement Date	Order Status	Project Name	Address	City	State	Zip	County	Lender
CT-Cash		None				СТ			
CT-Purchase	CT-Purchase			None			СТ		
CT-Refinance		None				СТ			
MA-Cash		None				MA			
MA-Purchase	MA-Purchase None					MA			
MA-Refinance	efinance None		one MA			MA	A		
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 X
Prefix:	Suffix:
Order number:	15-0013
Trust account:	×
 Orders/Templates to 	s copy
Order/Template MA-Cash	
<	III >
	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.



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

			Order 1	5-0013 - SoftPro Select	
ProForm 360 Order					
Register Checklist Tasks Requested Tasks	Notes	Documents Attachments	Document His 🔏 Field Code Br	story Apply Template owser Overlay Order ale Rename Order	Submit
Quick Links		Docum	nents	Actions	Workflow
Start Page Order 15-0013 X SoftPro Lite General/Title Commitment Policy Endorsements Payoffs Escrow/Closing	Rush order Rush order Exclude order from Auto-publish to So Transaction type Purchase Refinance Equity Other	s Order Entry	SoftPro Live ten Order type: Product type: Policy type:	nplate: Title & Escrow Owners Only	▼ ▼ ▼