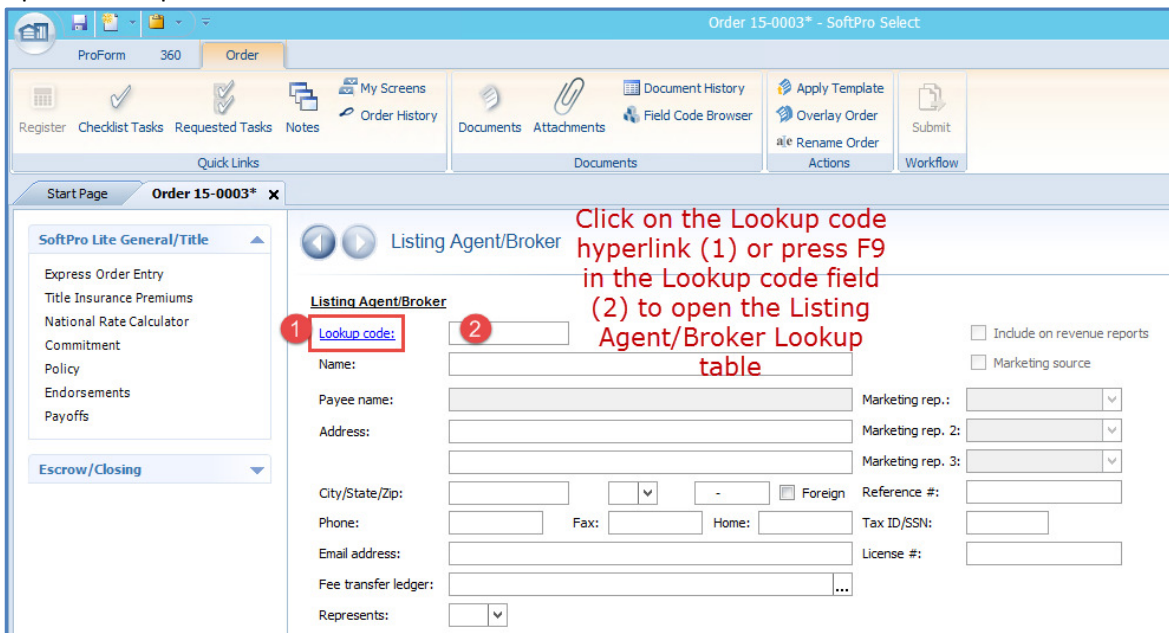


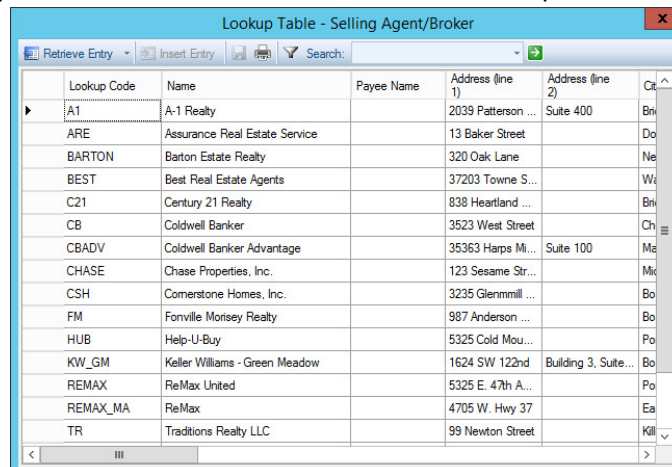
Using Lookup Tables

ProForm lookup tables are collections of frequently used data, such as your order contacts (lenders, real estate agents, etc.), or exceptions and requirements that are stored so they may be easily retrieved into a ProForm order to save data entry time. Storing information in lookup tables eliminates re-entering the same information into multiple orders. The data in these tables can be added to as you use contacts or other data to be used again on future orders.

Screens that use Lookup Tables usually contain a hyper link labeled **Lookup code** that is underlined in blue font, as shown in this example Listing Agent/Broker screen. Click on the link OR press **F9** in the Lookup code field to open a lookup table.



Clicking on the hyperlink or pressing F9 in the Lookup code field opens the Lookup table; in this example the Listing Agent/Broker lookup table where we see a list of Real Estate companies to select from:



Lookup Code	Name	Payee Name	Address (line 1)	Address (line 2)	City
A1	A-1 Realty		2039 Patterson ...	Suite 400	Bri
ARE	Assurance Real Estate Service		13 Baker Street		Do
BARTON	Barton Estate Realty		320 Oak Lane		Ne
BEST	Best Real Estate Agents		37203 Towne S...		Wi
C21	Century 21 Realty		838 Heartland ...		Bri
CB	Coldwell Banker		3523 West Street		Ch
CBADV	Coldwell Banker Advantage		35363 Harps Mi...	Suite 100	Me
CHASE	Chase Properties, Inc.		123 Sesame Str...		Mk
CSH	Cornerstone Homes, Inc.		3235 Glenmill ...		Bo
FM	Fonville Morisey Realty		987 Anderson ...		Bo
HUB	Help-U-Buy		5325 Cold Mou...		Po
KW_GM	Keller Williams - Green Meadow		1624 SW 122nd	Building 3, Suite...	Bo
REMAX	ReMax United		5325 E. 47th A...		Po
REMAX_MA	ReMax		4705 W. Hwy 37		Ea
TR	Traditions Realty LLC		99 Newton Street		Kill

The fastest way to choose one is to double-click anywhere on the line of the entry you want to select, but you can also:

- Click the row, and then click the Retrieve Entry button.
- Press the Tab key, then press the Up/Down arrow keys to navigate to the desired row, and then press **Enter** or Alt+R.

After I've Retrieved Keller-Williams, the Name, and other contact information populates the order from the Lookup table:

The screenshot shows the 'Listing Agent/Broker' form with the following populated fields:

- Lookup code: KW_GM
- Name: Keller Williams - Green Meadow
- Payee name: Keller Williams - Green Meadow
- Address: 1624 SW 122nd
- City/State/Zip: Boston, MA, 02241- (Foreign checkbox is checked)
- Phone, Fax, Home: (empty)
- Email address: (empty)
- Fee transfer ledger: (empty)
- Represents: (empty)
- Marketing rep.: (dropdown)
- Marketing rep. 2: (dropdown)
- Marketing rep. 3: (dropdown)
- Reference #: (empty)
- Tax ID/SSN: (empty)
- License #: (empty)
- Include on revenue reports: (checkbox)
- Marketing source: (checkbox)

Some Lookup Table entries have codes. To save time, if you know a contact's Lookup code, you can enter it in the Lookup code field instead of using the Lookup Table hyperlink or F9.

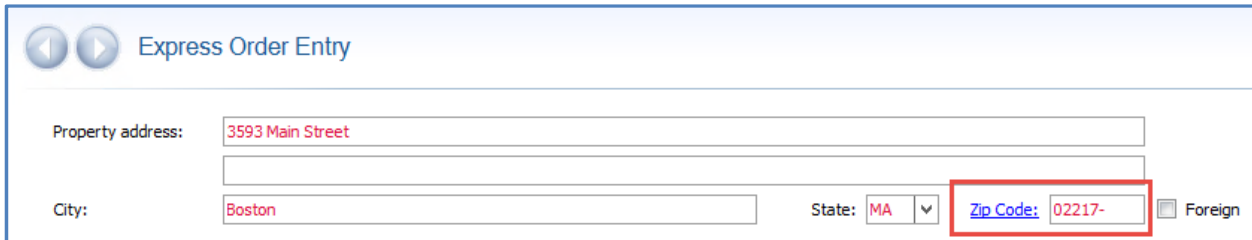
The screenshot shows the 'Listing Agent/Broker' form with the following populated fields:

- Lookup code: REMAX (A red arrow points to this field with the text 'Type the code and press Tab' above it.)
- Name: ReMax United
- Payee name: ReMax United
- Address: 5325 E. 47th Avenue
- City/State/Zip: Portland, ME, 12345- (Foreign checkbox is checked)
- Phone, Fax, Home: (empty)
- Email address: (empty)
- Fee transfer ledger: (empty)

If you need to remove an entry, press **F2** in the Lookup code field to remove all of the contact information that was retrieved from the Lookup table.

F2 is a commonly used keyboard shortcut that can be used anywhere in SoftPro Select to quickly delete information in a field.

Sometimes a Lookup Table will have a different label, but will still be underlined in blue font.



Express Order Entry

Property address: 3593 Main Street

City: Boston State: MA Zip Code: 02217- Foreign

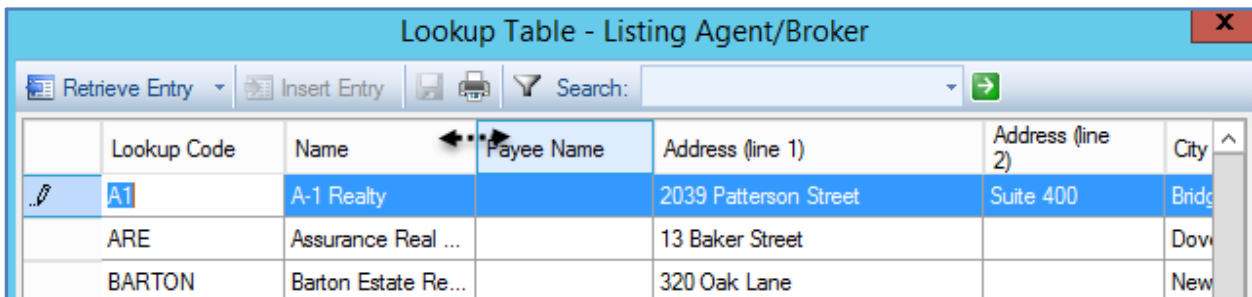
This is still a Lookup Table and works the same as the Listing Agent/Broker Lookup Table but this doesn't have Lookup Codes. Simply enter the zip code for your property and the City, State and County will fill in as well. This also works on all Contact screens and anywhere you have a Zip Code field.

You can also click the Hyperlink to Search for an entry if needed.

NOTE to Simulation Creator: Click the Order Contacts screen in My Screens. Display a blank Appraiser contact (double-click Appraiser if it is in the Contact grid or use the Plus icon), and click the Lookup code link. Delete these transition slides and begin the next section on Appraiser Lookup Table.

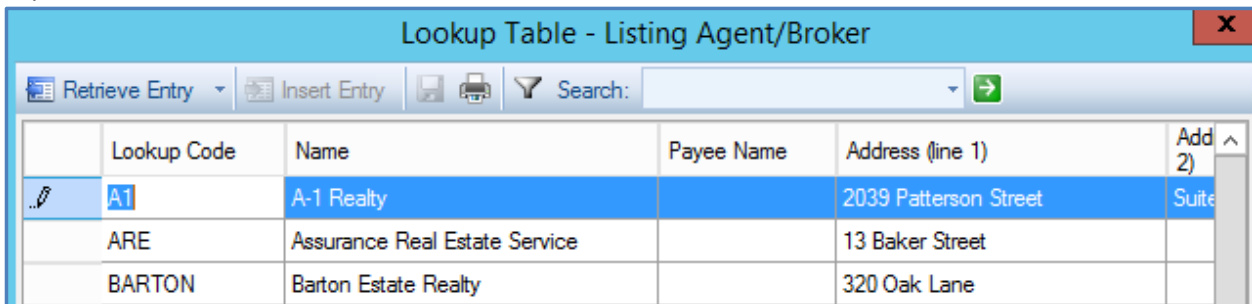
You can resize the Lookup Table window to assist you in your search. To make the Lookup Table screen bigger, hover over the edges or a corner to expand the entire window.

You can also make the columns themselves bigger. Click and drag between column headers to make a column bigger. In this example I am going to click between the Name and Payee headers, drag the mouse to the right so that the Name column will be wider:



Lookup Code	Name	Payee Name	Address (line 1)	Address (line 2)	City
A1	A-1 Realty		2039 Patterson Street	Suite 400	Bridg
ARE	Assurance Real ...		13 Baker Street		Dove
BARTON	Barton Estate Re...		320 Oak Lane		New

Expanded Name Header:



Lookup Code	Name	Payee Name	Address (line 1)	Add 2)
A1	A-1 Realty		2039 Patterson Street	Suite
ARE	Assurance Real Estate Service		13 Baker Street	
BARTON	Barton Estate Realty		320 Oak Lane	

This Listing Agent/Broker Lookup Table contains several entries. We know company is in the city of Boston. You can click the City column header to sort the entries by City:

Lookup Table - Listing Agent/Broker										
Retrieve Entry Insert Entry Search: <input type="text"/>										
Lookup Code	Name	Payee Name	Address (line 1)	Address (line 2)	City	State	Zip	Phone	Fax	
WRB	Williams Realty & Building Co.		233 Steeplechase Court		Auburn	ME	04211			
FM	Fonville Morisey Realty		987 Anderson Drive		Boston	MA	02353			
CSH	Comerstone Homes, Inc.		3235 Glenmill Place		Boston	MA	02345			
KW_GM	Keller Williams - Green Meadow		1624 SW 122nd	Building 3, Suite...	Boston	MA	02241			
C21	Century 21 Realty		838 Heartland Place		Bridgeport	CT	06604			
A1	A-1 Realty		2039 Patterson Street	Suite 400	Bridgeport	CT	06600			

The list is now sorted alpha-numerically by city and the Company we need displays towards the top of the list. When you sort by columns, there is a sort indicator arrow letting you know that the table is sorted by that column. When the arrow is pointed up that means the information is sorted A-Z.

If you click the column header a 2nd time, the information is sorted Z-A and the sort indicator arrow is pointing down.

You can sort on any column in a Lookup Table, but you can only sort by one column at a time.

If a Lookup Table has a large number of entries, there are two ways to help you find information. You can:

- Use the Quick Search field
- Use the Filter Icon

Using the Quick Search Feature

When you enter the search criteria in the Quick Search field, the system will search for the data in all of the columns for this Lookup Table. The fastest way to generate results is to press the Enter key, but you can also click the Execute search icon.

Lookup Table - Listing Agent/Broker							
Retrieve Entry Insert Entry Search: <input type="text" value="cold"/>							
Found 3 matches.							
Lookup Code	Name	Payee Name	Address (line 1)	Address (line 2)	City	State	
CB	Coldwell Banker		3523 West Street		Chester	MA	
CBADV	Coldwell Banker Advantage		35363 Harps Mill Road	Suite 100	Manchester	NH	
HUB	Help-U-Buy		5325 Cold Mountain Drive		Portland	ME	

* Click here to add a row

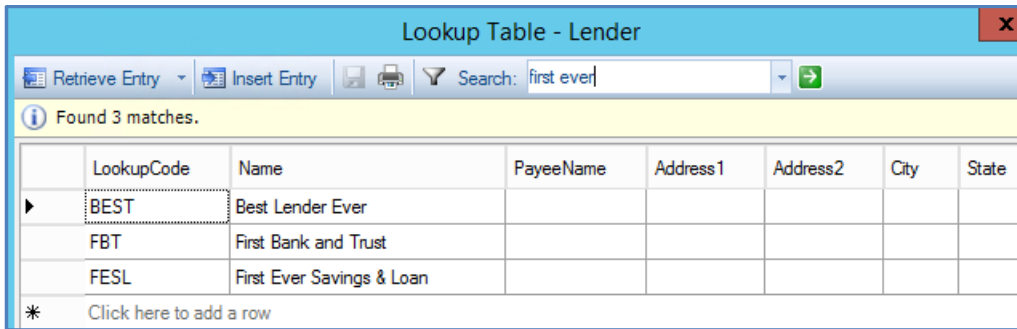
The results display, and the number of items that match your search criteria is shown.

All of the items that have been returned have san in one or more of the columns. The first two items have "cold" in the Name column. The third item has "cold" in the Address column.

Most users prefer to search by name when using Lookup Tables for contacts.

When searching for the name of a company with multiple words using the Quick Search field, you may need to place the name in quotation marks. Otherwise, the system will look for both words individually.

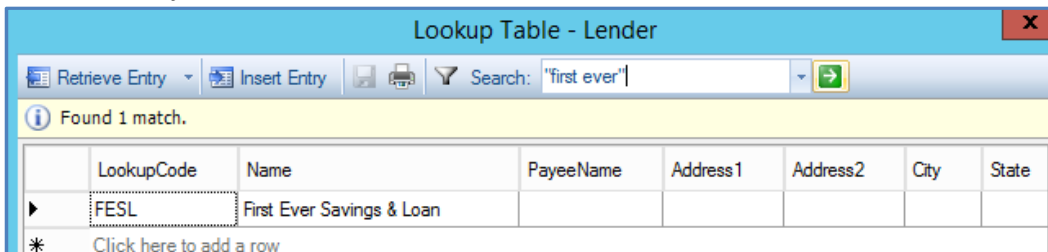
For example, if we enter first ever (without quotation marks) we find *Best Ever Lender*, *First Bank and Trust* as well as *First Ever Savings & Loan*. The system searched for both words individually.



The screenshot shows a window titled "Lookup Table - Lender" with a search bar containing "first ever". Below the search bar, it says "Found 3 matches." and displays a table with the following data:

LookupCode	Name	PayeeName	Address1	Address2	City	State
BEST	Best Lender Ever					
FBT	First Bank and Trust					
FESL	First Ever Savings & Loan					

However, if we type "first ever" (in quotation marks) to locate the lender First Ever Savings & Loan and press Enter we find just 1 result:



The screenshot shows a window titled "Lookup Table - Lender" with a search bar containing "first ever". Below the search bar, it says "Found 1 match." and displays a table with the following data:

LookupCode	Name	PayeeName	Address1	Address2	City	State
FESL	First Ever Savings & Loan					

Another good method when using the Quick Search is to search by the street address number since that is usually unique in tables.

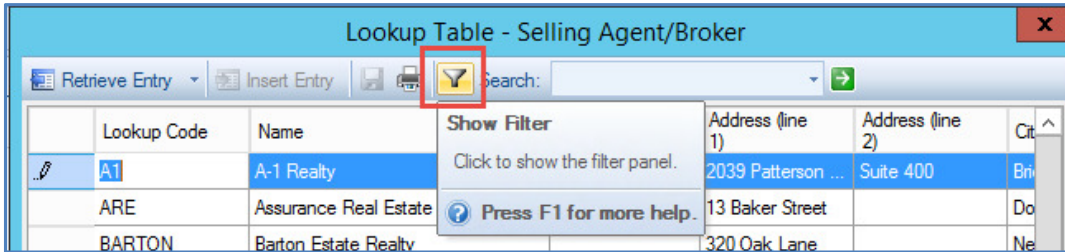
There are certain symbols and generic words that cannot be used with the Quick Search feature. Even though the symbols and generic words may be in the table, they are not searchable when locating entries in the Lookup Tables.

For example, RE/MAX has a symbol in its name. The forward slash (/) is a symbol and is not searchable. The best way to search for RE/MAX is to search for max.

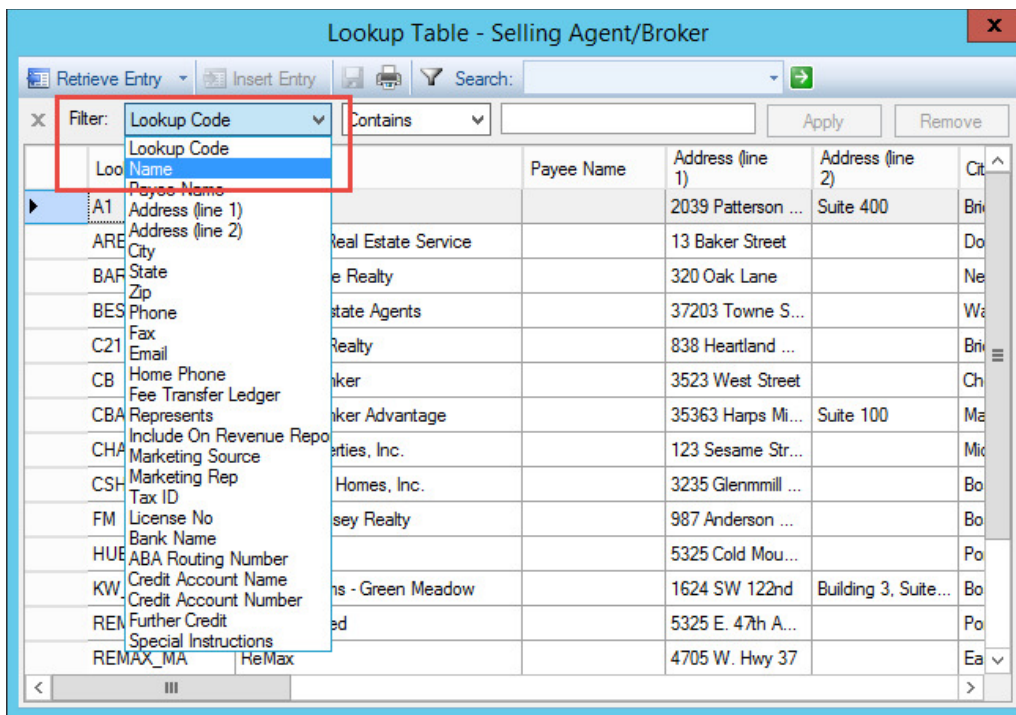
Generic words such as certain prepositions, articles, and pronouns are also not searchable. For example, Bank of America contains the preposition of in its name. The word of cannot be included in the search. The best way to search for Bank of America would be to use the most unique word in the name, which is America.

Using the Filter Feature

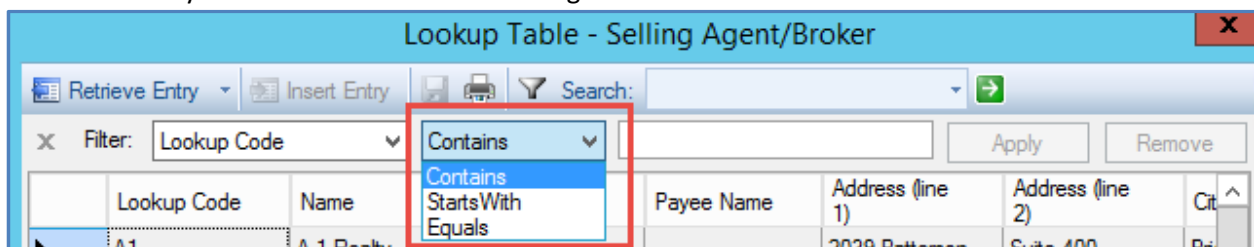
The second method of finding information in Lookup Tables allows the use of all symbols and generic words; using the Filter icon.



The Filter method allows you to choose the column in which to search. The most commonly searched column is the Contact Name column.

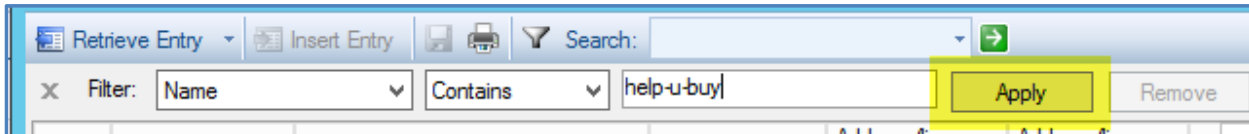


This list allows you to choose different matching criteria.



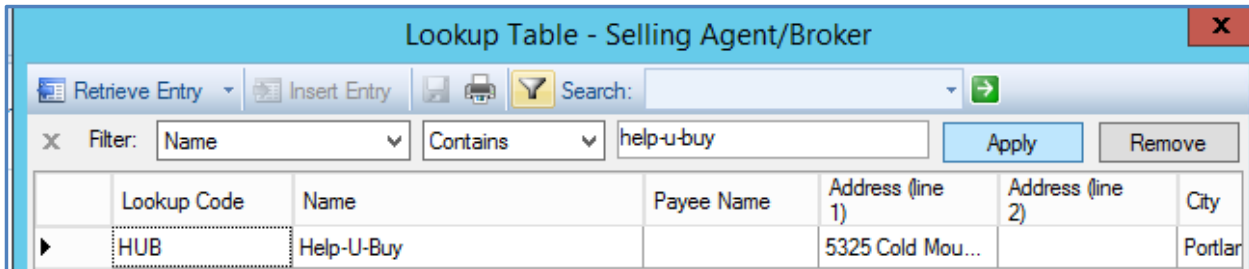
The most commonly used is Contains, which provides you with the most results. You can change to Starts With or Equals in order to produce a more precise search.

Click the Apply button to begin the search.

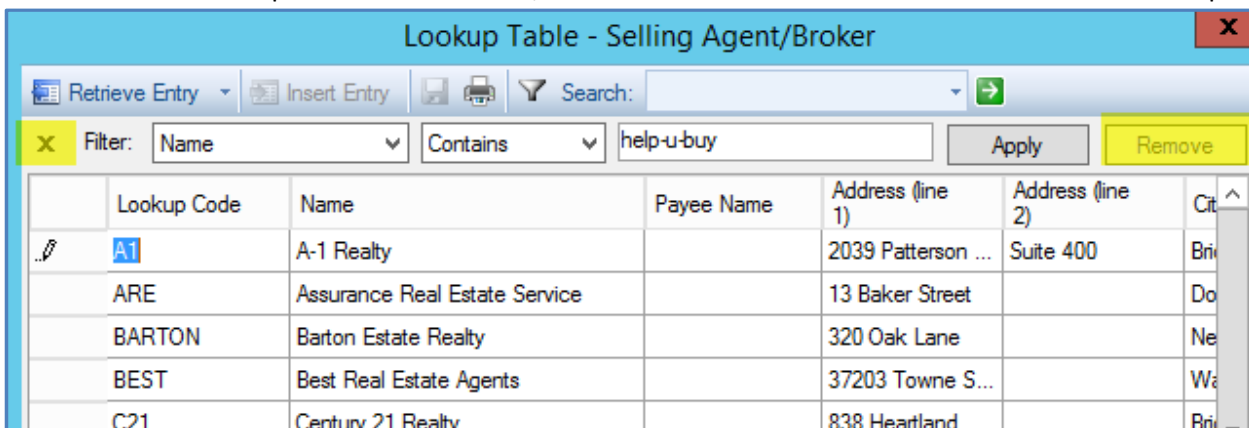


Note that you cannot press the Enter key when using the Filter.

Unlike the in Quick Search method, you can use generic words and symbols when using the Filter. For example, it found Help-U-Sell.



To clear the Filter and perform a new search, click the Remove button. The Filter resets for the Lookup Table.



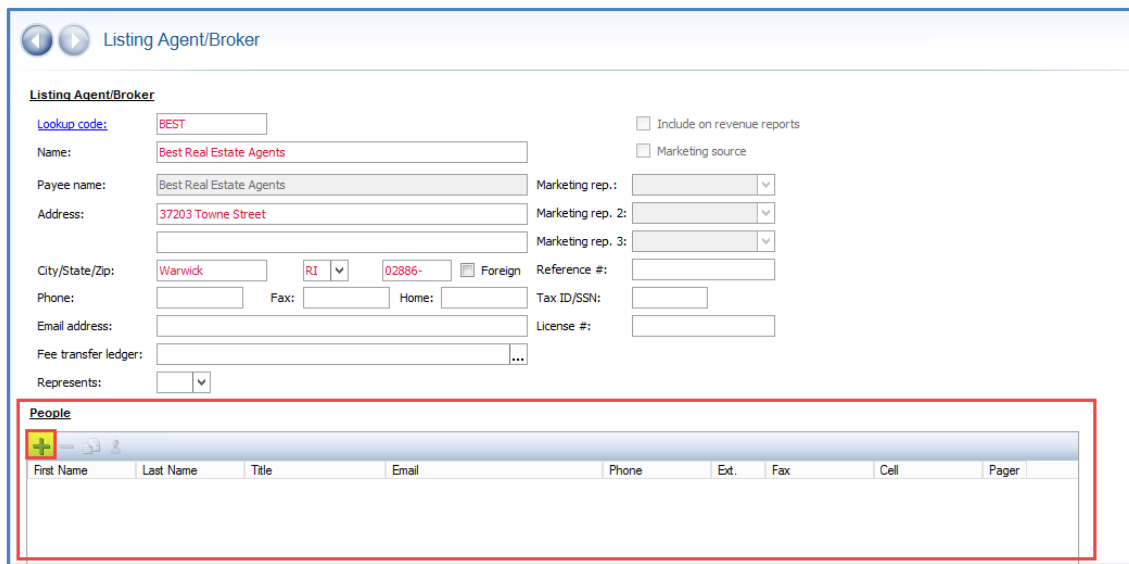
It is important to also remember that neither the Quick Search nor the Filter is case sensitive, so it is easiest to enter your search text in lower case.

Adding People to the Contact screens

Note that the Contact screens are divided into 2 sections. The top section is for the Company information. The People section is where you enter the person.

You always need to enter the Company first and then the Person. For example, if you wanted to add John Adams the Realtor who works for Best Real Estate Agents, you would first enter the Company name at the top and then add John Adams at the bottom.

Use the  to add a Person:



Listing Agent/Broker

Lookup code: BEST

Name: Best Real Estate Agents

Payee name: Best Real Estate Agents

Address: 37203 Towne Street

City/State/Zip: Warwick RI 02886- Foreign

Phone: Fax: Home: Tax ID/SSN:

Email address: License #:

Fee transfer ledger: ...

Represents: ...

Include on revenue reports

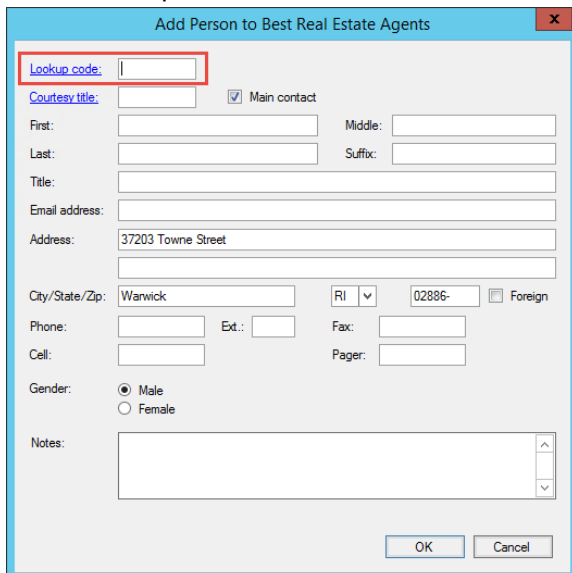
Marketing source

Marketing rep.: Marketing rep. 2: Marketing rep. 3: Reference #: Tax ID/SSN: License #:

People

First Name	Last Name	Title	Email	Phone	Ext.	Fax	Cell	Pager

This opens the Add Person dialogue box. You can manually key in contact information but there is also a Lookup table for People:



Add Person to Best Real Estate Agents

Lookup code: |

Courtesy title: Main contact

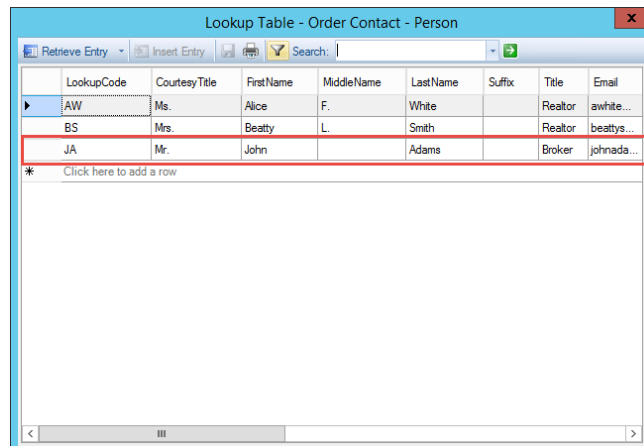
First: Middle: Last: Suffix: Email address: Address: 37203 Towne Street

City/State/Zip: Warwick RI 02886- Foreign

Phone: Ext.: Fax: Cell: Pager:

Gender: Male Female

Notes: OK Cancel



Lookup Table - Order Contact - Person

Retrieve Entry Insert Entry Search

LookupCode	CourtesyTitle	FirstName	MiddleName	LastName	Suffix	Title	Email
AW	Ms.	Alice	F.	White		Realtor	awhite...
BS	Mrs.	Beatty	L.	Smith		Realtor	beatys...
JA	Mr.	John		Adams		Broker	johnada...

* Click here to add a row

Double-click anywhere on the line of the entry you want to select, or click the row, and then click the Retrieve Entry button.

Add Person to Best Real Estate Agents x

Lookup code:

Courtesy title: Main contact

First: Middle:

Last: Suffix:

Title:

Email address:

Address:

City/State/Zip: Foreign

Phone: Ext.: Fax:

Cell: Pager:

Gender: Male Female

Notes:

⏪ ⏩ Listing Agent/Broker

Listing Agent/Broker

Lookup code: Include on revenue reports

Name: Marketing source

Payee name: Marketing rep.:

Address: Marketing rep. 2:

City/State/Zip: Foreign Marketing rep. 3:

Phone: Fax: Home: Reference #:

Email address: Tax ID/SSN:

Fee transfer ledger: License #:

Represents:

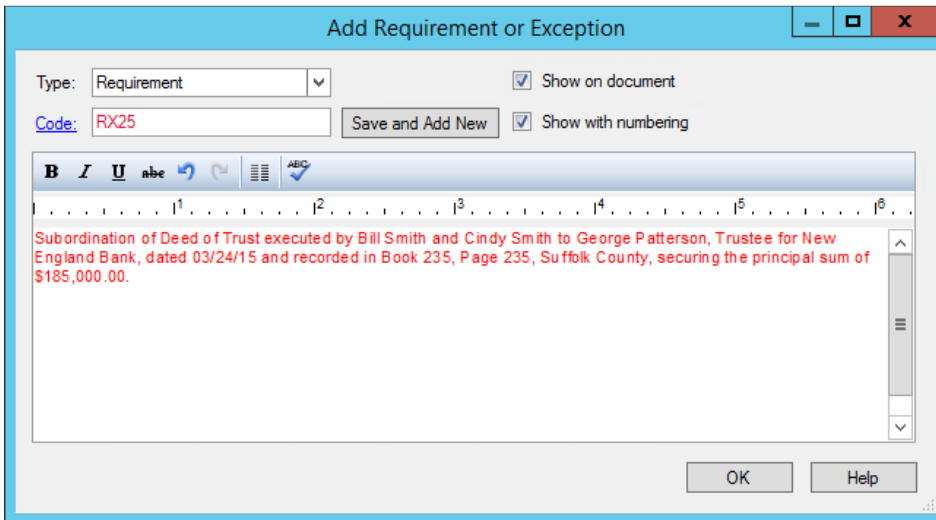
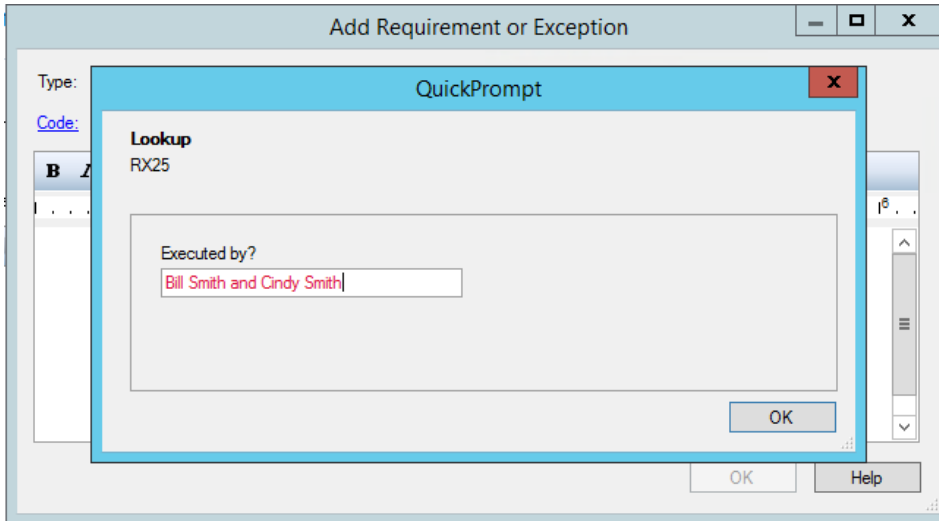
People

	First Name	Last Name	Title	Email	Phone	Ext.	Fax	Cell	Pager
👤	John	Adams	Broker	johnadams@bestrealestate.com	(555)111-2222		(555)222-3333	(555)233-3222	

You can add as many People to this section as needed. For instance, if the Realtor had an assistant that you want to list or there is a team of Realtors.

Using Prompts in Lookups

When lookup entries include prompts, and an entry is retrieved the quick prompts dialog(s) appear. Answer the prompt(s). Click **OK** to continue. The responses appear in the order.

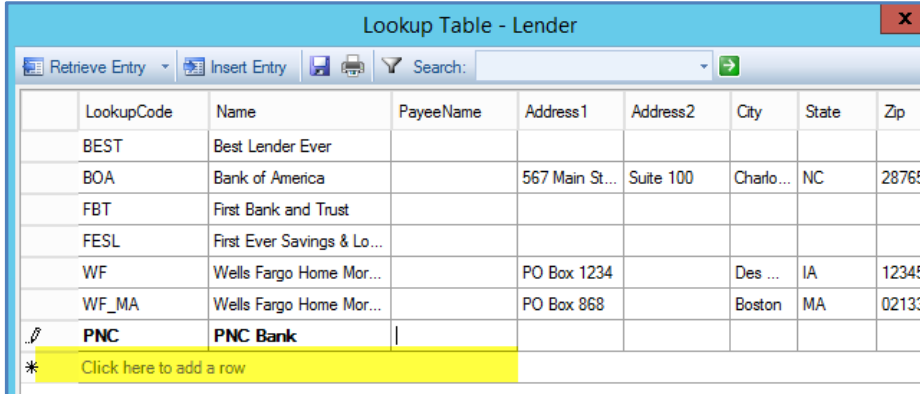


Adding Lookup Entries

Add an entry two ways: direct data entry and extracting data from an order into the lookup table.

Direct Data Entry

1. Select the last row in the grid of the Lookup dialog. This is an empty row.
2. Enter data in each row. Use the arrow keys to navigate the grid. You can add as many rows as needed.



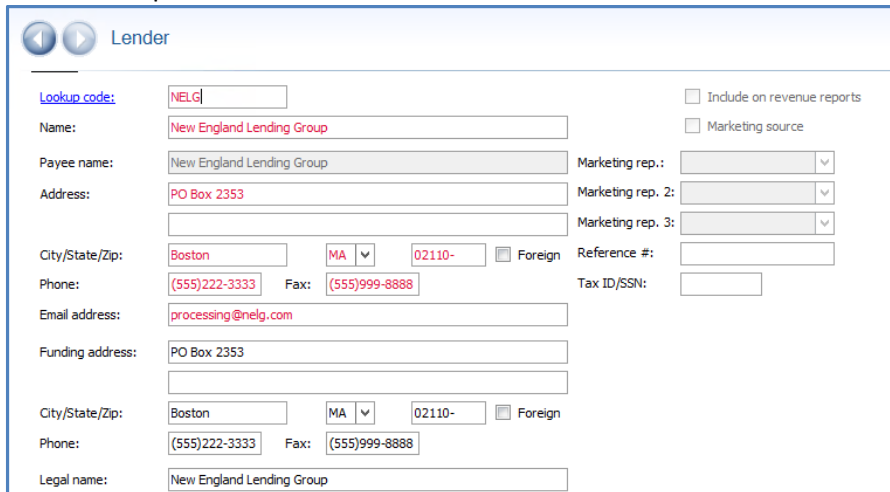
LookupCode	Name	PayeeName	Address1	Address2	City	State	Zip
BEST	Best Lender Ever						
BOA	Bank of America		567 Main St...	Suite 100	Charlo...	NC	28765
FBT	First Bank and Trust						
FESL	First Ever Savings & Lo...						
WF	Wells Fargo Home Mor...		PO Box 1234		Des ...	IA	12345
WF_MA	Wells Fargo Home Mor...		PO Box 868		Boston	MA	02133
PNC	PNC Bank						

* Click here to add a row

Using Data from an Order

The second way to add entries is using data from an order and adding or Inserting it into the lookup table. Input data into the order's fields, then access the lookup table from the key field.

Here, a Lender's information has been entered on the screen. Click the blue **Lookup code** hyperlink or press **F9** in the Lookup code field.



Lender

Lookup code: Include on revenue reports

Name: Marketing source

Payee name: Marketing rep.:

Address: Marketing rep. 2:

City/State/Zip: Foreign Marketing rep. 3:

Phone: Fax: Reference #:

Email address: Tax ID/SSN:

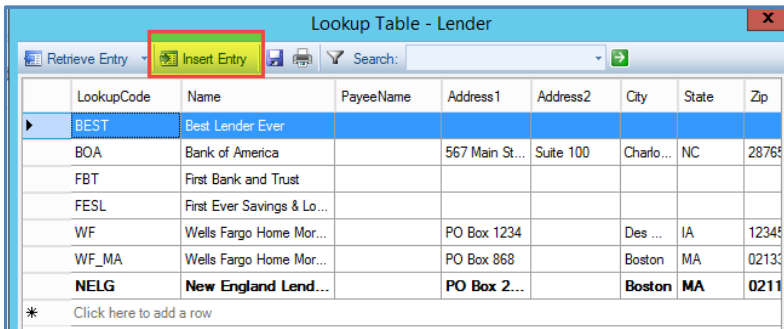
Funding address:

City/State/Zip: Foreign

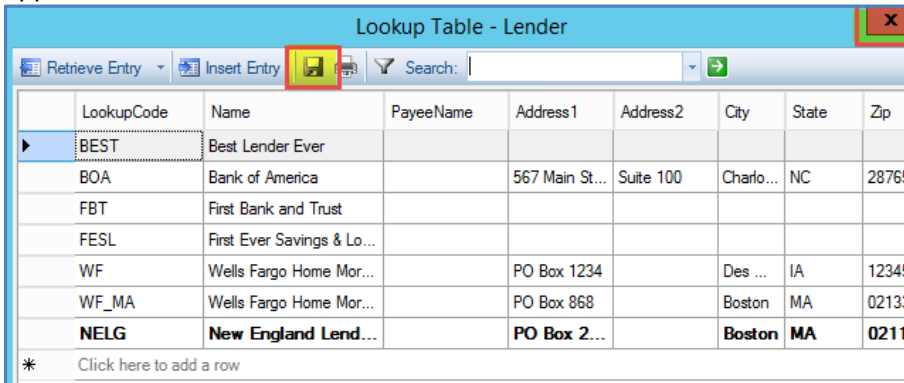
Phone: Fax:

Legal name:

Click **Insert Entry**. ProForm inserts user-entered data only from the order into the appropriate columns.

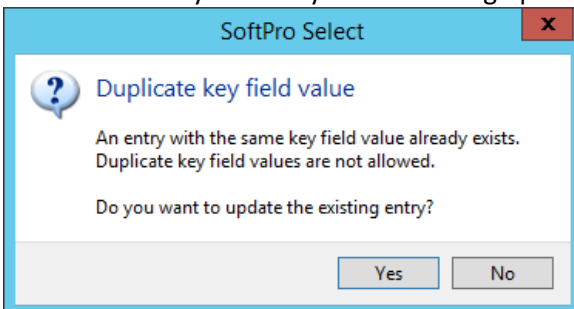


All new entries appear in bold text until they are saved. You will be prompted to save when you click the X in the upper-left hand corner but can also use the Save icon.



Updating Entries Using Insert Entry

If you have information to update to a Lookup table entry, you can click directly in the table to change this. If you have updated this information in your order already, you can click the blue hyperlink for the lookup table or press F9. Click **Insert Entry**. A message appears when inserting data from an order and a matching entry already exists for the key field only. The following options are provided: **Yes** or **No**.



Click **Yes** to update the existing entry. Click **No** to return to the order with no changes.

Deleting Lookup Entries

To delete an entry in the lookup table, select one entry at the beginning of the row.

1. Press the **Delete** key. A prompt appears to confirm the deletion.
2. Respond **Yes** and the entry is removed from the grid and deleted when the order is saved.
3. Respond **No** and the entry remains displayed in the grid and no changes occur.

