

Managing RealEC within SoftPro 360

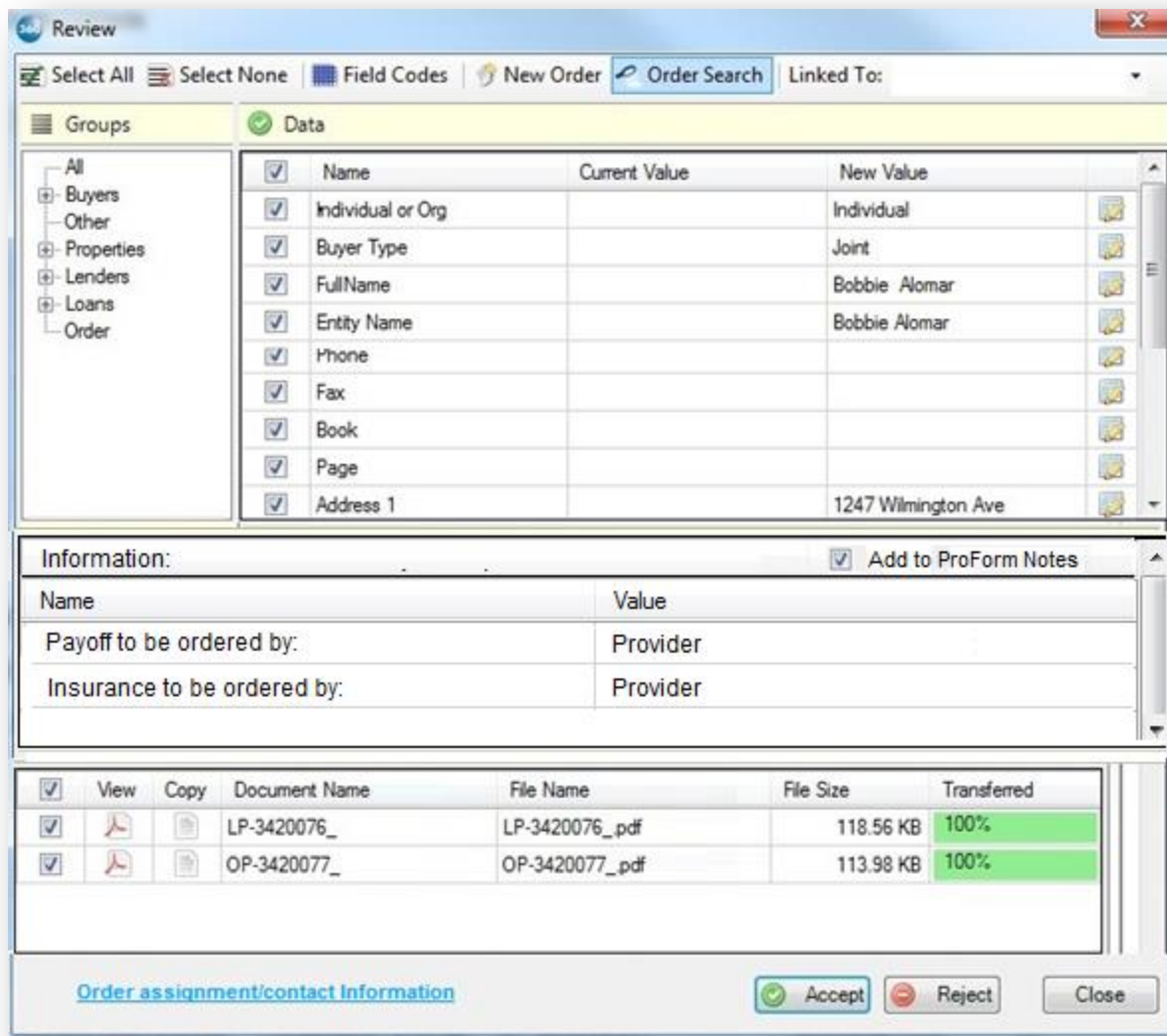
The SoftPro 360 integration with RealEC provides SoftPro 360 users the ability to receive Title, Escrow/Closing and Document Signing order requests seamlessly from several Lenders directly into ProForm. In addition to accepting (or rejecting) order requests, a new order can be created with an extended amount of data automatically flowing into ProForm, increasing productivity and efficiency. Data, Document and Comment Events can be sent and received throughout the life of the transaction.

Accessing New RealEC orders within the SoftPro 360 queue

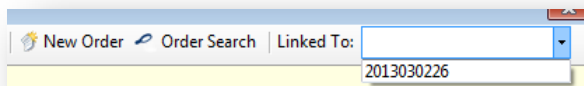
New orders sent from RealEC will appear in the SoftPro 360 Queue under the view 'New Transactions'. The Description column will display the Buyer's last name, Buyer's first name, the property address and the Lender name.

Transaction Number	Provider	Status	Linked Order	Created By	Created On	Completed On	Provider Reference Number	Description
410060-60-140613-002755	RealEC	New		realecserviceacc...	6/13/2014 4:12 PM		13453238-10475407	Buyer, Bob, 4545 South Str Raleigh, NC, Signing Appointment Service - only/ Lender -
410060-60-140613-002754	RealEC	New		realecserviceacc...	6/13/2014 4:11 PM		13453238-10475407	Buyer, Bob, 4545 South Str Raleigh, NC, Closing - only/ Lender - ABC Mortgage
410060-60-140613-002753	RealEC	New		realecserviceacc...	6/13/2014 4:11 PM		13453238-10475407	Buyer, Bob, 4545 South Str Raleigh, NC, Title - only/ Lender - ABC Mortgage

To Accept or Reject a new transaction, highlight and double click the transaction or highlight and click Next Step. The Review screen will open and display all of the data sent from the Lender. Clicking 'Accept' will send the 130 event to RealEC. Clicking 'Reject' will send the 140 event to RealEC. Checked data (all checked by default) will be pushed into a new or existing linked ProForm order. The Information section, found in the middle of the Review screen, will display information needed for the order. By default the values displayed in this section will be sent to the ProForm order notes. If documents are included with the RealEC order they will be displayed in the bottom section of the Review screen and can also be accepted into the linked ProForm order. Accepted documents will be attached to the ProForm order and stored in SmartView, SPIImage for the Enterprise/Standard versions or in Attachments & Document History for SoftPro Select users.



There are three options to attach the data/documents into a ProForm order: create a New Order, Search for an Order or Linking To an order that is currently opened in ProForm.



- Clicking the New Order button will open the ProForm New Order screen. Once the New Order information (Prefix, Suffix, Order Number, Trust account and template) has been entered click OK. Clicking OK will place the New Order number into the Linked To field on the Review screen and open the order within ProForm.
- Clicking the Order Search button will open the ProForm Order Search screen. Highlight and double click the desired order number. The chosen order number will be placed into the Linked To field on the Review screen and the order will open in ProForm.
- If the ProForm order that the data should be entered into is already open in ProForm, click the Linked To drop down and select the ProForm order number.

Once the ProForm order number has been selected and is displayed in the Linked To field, the Current Value column will populate with any values currently in the ProForm order and the Field Code column can be displayed. Click Accept to replace the Current Values with the New Values and send Event 130 – Service Confirmed to RealEC. The SoftPro 360 / RealEC transaction will update to an 'In Progress' status.

NOTE: The order can be rejected by clicking the Reject button. Transactions that are rejected will be displayed in the SoftPro 360 queue as 'Rejected' with no further action being available to the transaction. RealEC and the lender will be notified that the order was rejected.

If applicable, the additional RealEC orders (Title, Escrow/Closing and/or Document Signing) will also need to be either Accepted or Rejected. If Accepted, the steps above also apply. Typically, for the additional RealEC orders, the Order Search or Linked to option will be used.

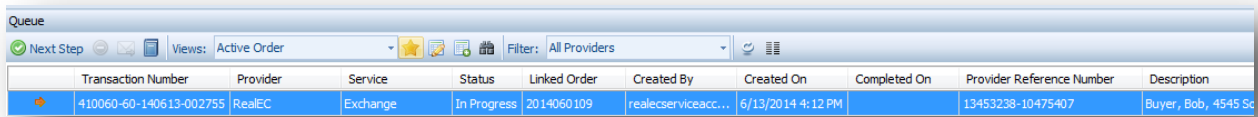
Order Assignment

The Order Assignment link on the Review screen provides the option to send contact information back within the 130 Accept event. Click the link to open the 130 Event screen to enter the Assigned Officer, Order Contact and Contact Phone number.

Name	Value
Assigned to Office	SoftPro
Order Contact	Kathy Cada
Contact Phone Number	919-829-1122

Sending / Receiving Events

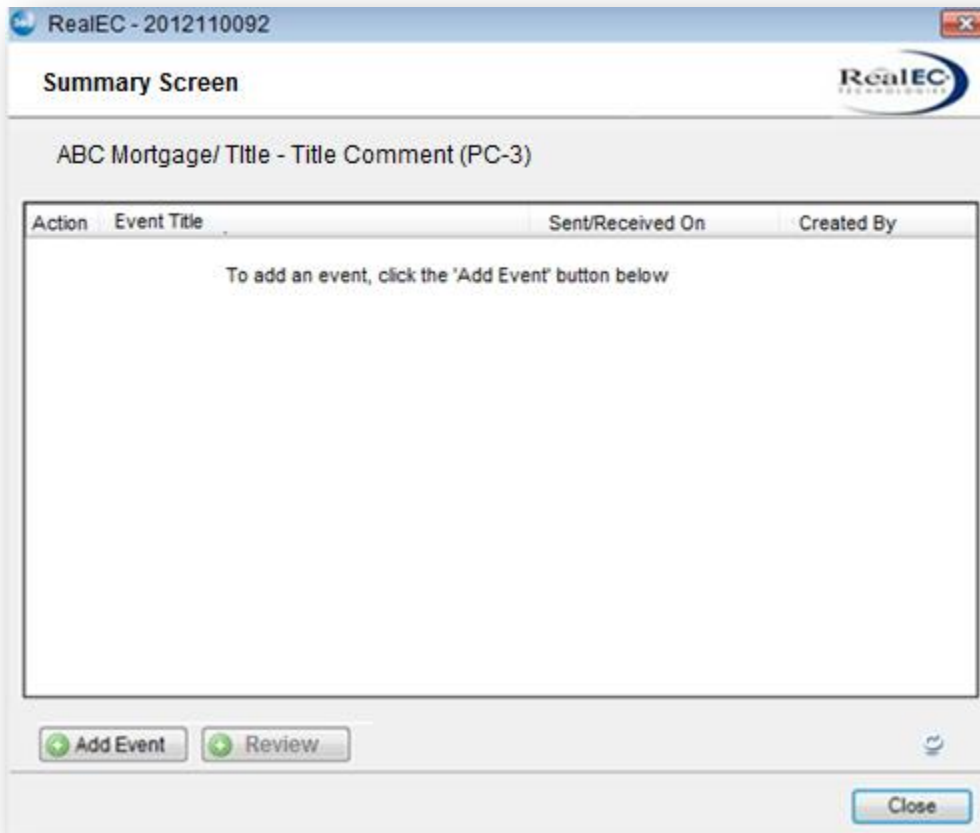
To send and receive Events, change the SoftPro 360 Queue view to 'Active Order' or 'In Progress'.



The screenshot shows a window titled "Queue" with a toolbar containing a "Next Step" button and other icons. Below the toolbar is a table with the following data:

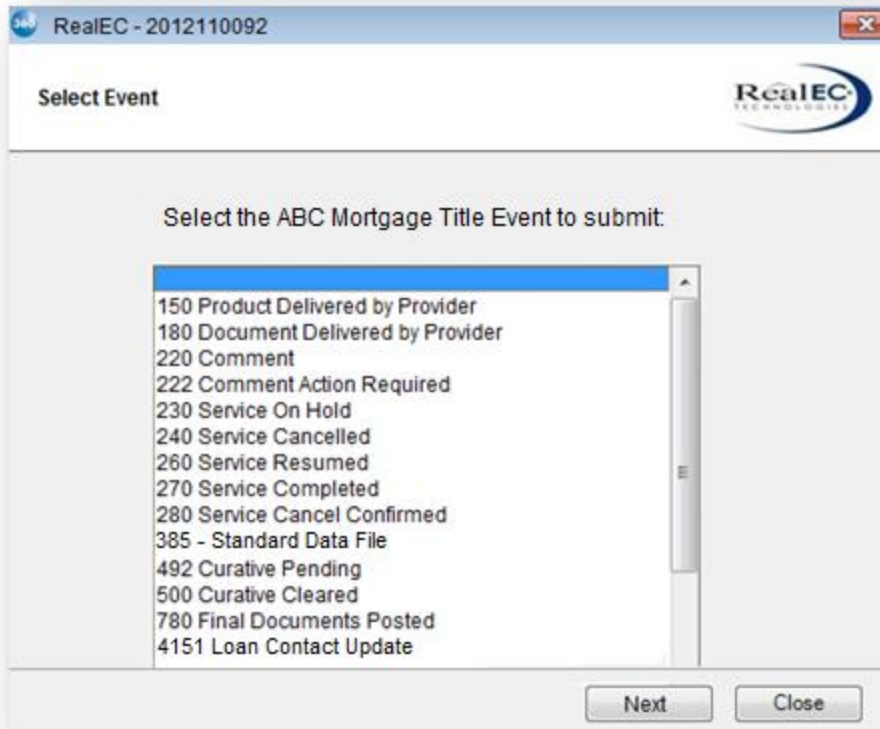
Transaction Number	Provider	Service	Status	Linked Order	Created By	Created On	Completed On	Provider Reference Number	Description
410060-60-140613-002755	RealEC	Exchange	In Progress	2014060109	realecserviceacc...	6/13/2014 4:12 PM		13453238-10475407	Buyer, Bob, 4545 St

To see incoming events or to send events click the Next Step button. The Summary Screen will be displayed. This screen will show all events that have occurred for the transaction. Click the 'Add Event' button to open the Select Event screen.



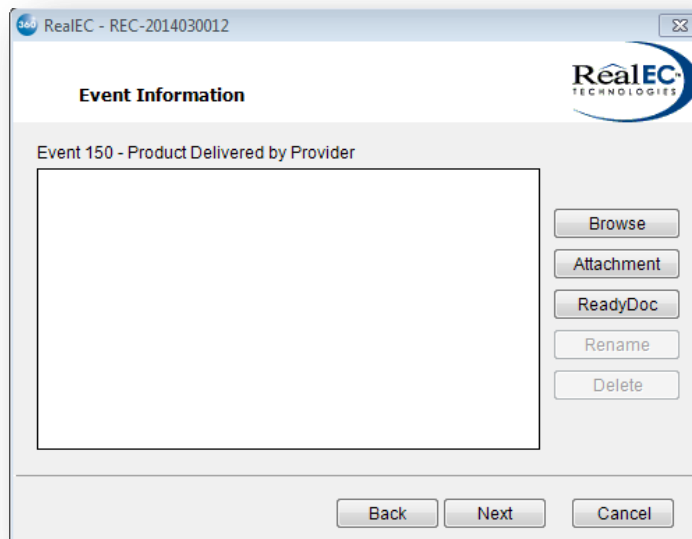
The screenshot shows a window titled "RealEC - 2012110092" with a "Summary Screen" header. The main content area displays "ABC Mortgage/ Title - Title Comment (PC-3)". Below this is a table with the following columns: Action, Event Title, Sent/Received On, and Created By. The table is currently empty, and a message reads: "To add an event, click the 'Add Event' button below". At the bottom of the window, there are three buttons: "Add Event", "Review", and "Close".

Highlight the desired Event then click Next. The Select Event screen will display the available Events supported for the specific Product Order Type of the transaction. In the screen shot below the Events are specific to the Title Product Order type.



The Event Information screens will vary between the Document Delivery, Data Delivery or Comment screens depending upon the event selected.

For events sending documents the Document Delivery Event Information screen will be displayed. To attach a document click the Browse button to browse out to a file/folder location, click Attachment to attach a document from SmartView (FNF Users) SPIImage (Standard or Enterprise) or the Attachments & Document History (Select) or click the ReadyDoc button to open and attach a ReadyDoc from the ReadyDocs tree. The Document Name will default to the name of the document attached but can be modified. Only one document can be sent at a time. Click Next.



Events sending data will have similar Event Information screen as what's shown below. If mapped and/or entered into the ProForm order, data will be pulled from the linked ProForm order or the data can be manually added/edited.

The screenshot shows a window titled "RealEC - REC-2014030012". The main heading is "Event Information" with the RealEC Technologies logo. Below this, it says "Event 150 - Product Delivered by Provider". A table with two columns, "Name" and "Value", contains the following data:

Name	Value
Doc Type	Closing Protection Letter
Doc Status	Final
Version Number	1

At the bottom of the window are three buttons: "Back", "Next", and "Cancel".

Events sending a comment will have the Comment Event Information screen. Comments can be manually added and then sent back to the linked ProForm order's Notes by selecting the 'Add to ProForm order' checkbox. Click Submit to continue.

The screenshot shows a window titled "RealEC - 2012110092". The main heading is "Event Information" with the RealEC Technologies logo. Below this, it says "Event 222 - Comment Action Required". There is a text area labeled "Enter Comments:" and a checkbox labeled "Add to ProForm order" which is checked. At the bottom of the window are three buttons: "Back", "Submit", and "Cancel".

Contact information can be updated and sent to the Lender with Event 4151 – Loan Contact Update. Enter the email address of the user who will be the contact of the RealEC order and whom the Lender can reach out to.

RealEC - 2012110092

Event Information

RealEC TECHNOLOGIES

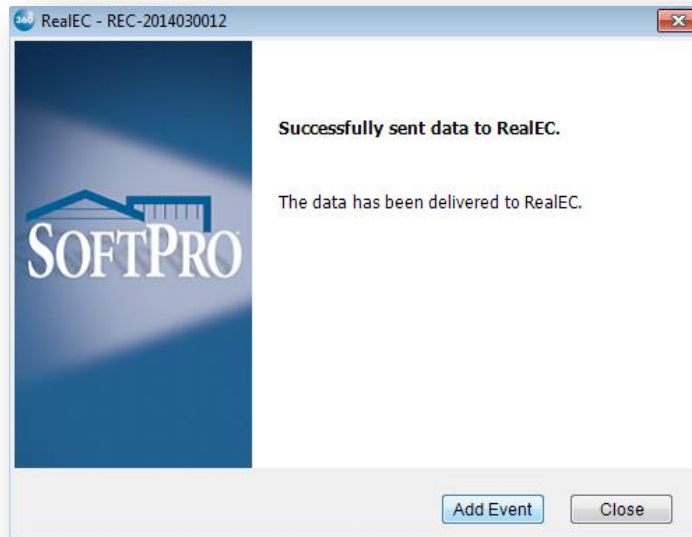
ABC Mortgage / Event 4151 - Loan Contact Update

Enter the email address of the user who should receive RealEC email notifications for this order. This email address will be displayed in the 'Contacts' column of the SoftPro 360 queue.

Email Address:

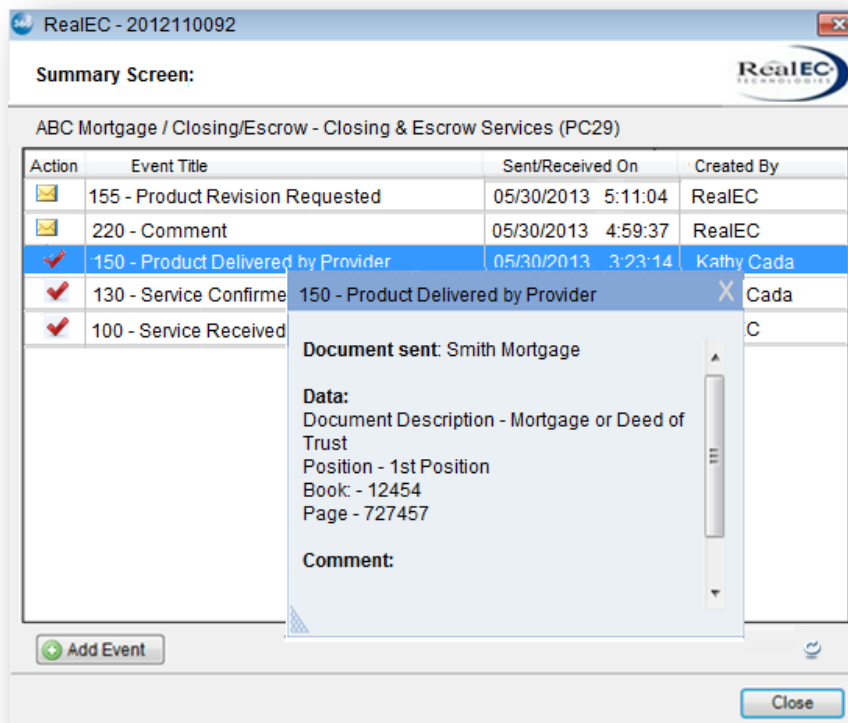
Back Next Cancel

When an event is sent the successful message will be received. The Summary screen will update with the latest Event sent.

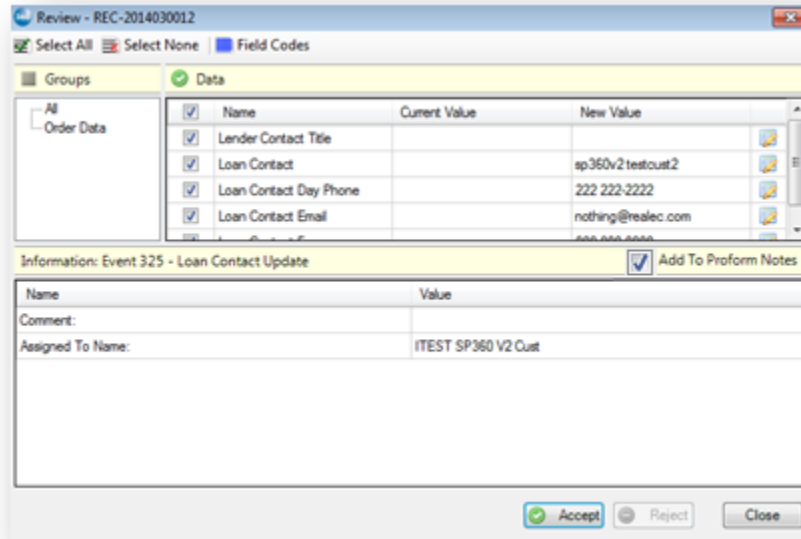


Reviewing Events

Incoming events will appear in the SoftPro 360 queue with an envelope icon and with a Ready status. The envelope will also be displayed in the Summary Screen to the left of the Event title to indicate a new incoming event has been received. To view, highlight the new incoming event on the order Summary screen and click the Review button.

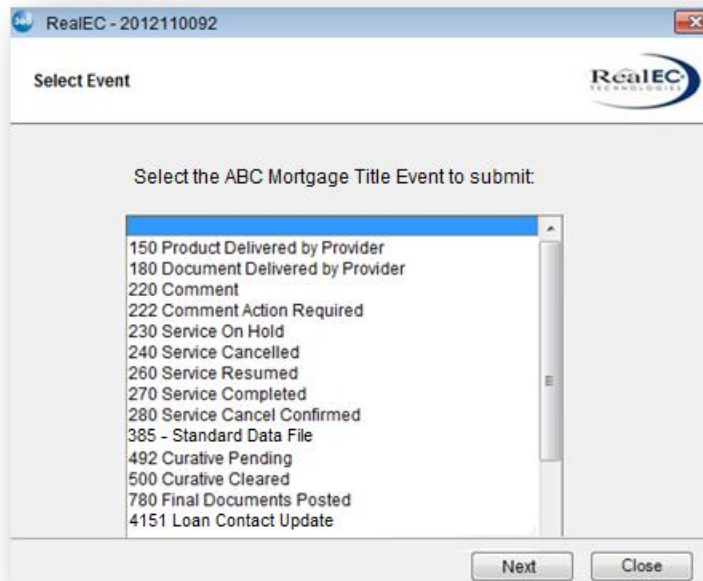


Depending upon the event that has been received, there may be data and/or documents to be accepted into the ProForm order, for example event 325 is for an Update. This review screen shows the New Values received that will replace any Current Values in the linked ProForm order. By default all values will be selected, click Accept to continue. The event in the Summary screen will update with a check mark in the left column. The transaction in the SoftPro 360 queue will update back to 'In Progress'.



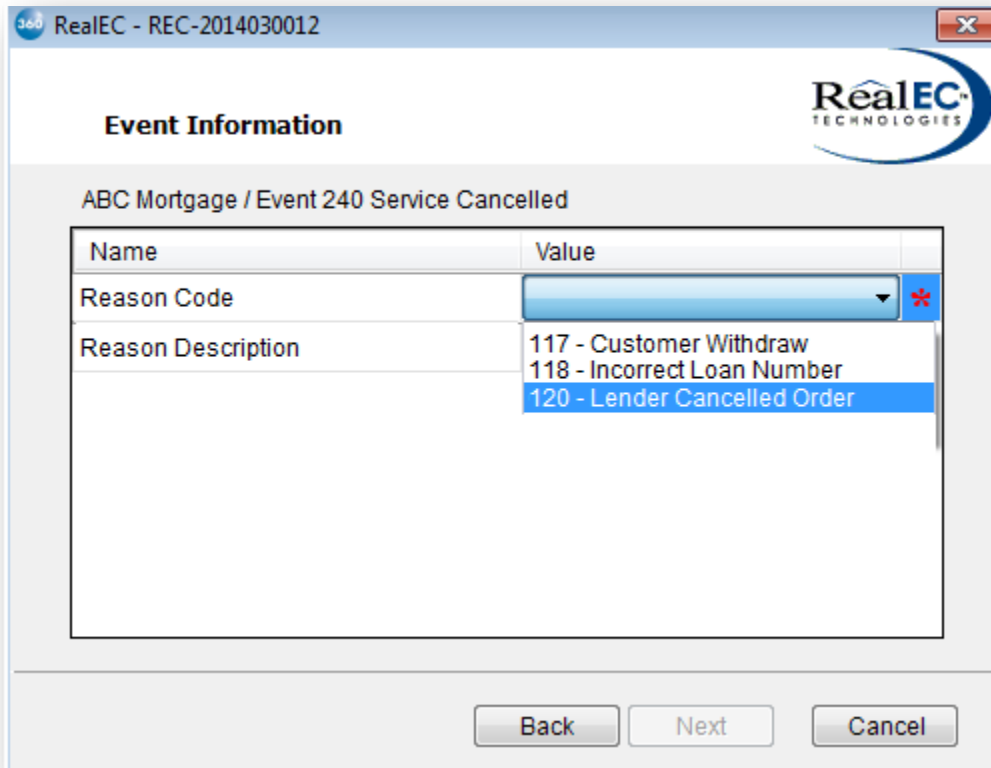
Cancelling a RealEC transaction

To cancel an order, select the 240 – Service Cancelled event on the Select Event screen.



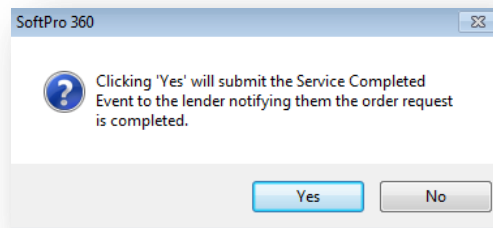
The Event Information screen for the 240 Service Cancelled event will be displayed. Select the appropriate Reason Code for cancelling the order and click Next. The transaction in the 360 Queue will update to Cancelled. Although the status is Cancelled, events can still be sent and received up to 12 months from the last activity date. On the 12th month no further events can be sent or received.

NOTE: Once an order has been cancelled it cannot be re-activated. A new order would need to be sent by the Lender.



Completing a RealEC transaction

To complete a transaction click the 270 – Order Completed from the Select Event screen. A confirmation message will be displayed. Click Yes to complete the order.



The transaction will update to a Completed status in the SoftPro 360 Queue and the completed event is sent to RealEC. Events can still be sent and receive up to 12 months from the last activity date. On the 12th month events can no longer be sent or received.