SoftPro 360 User Guide

March 8, 2016

4800 Falls of Neuse Road, Suite 400 | Raleigh, NC 27609

p (800) 848–0143 | f (919) 755–8350 | www.softprocorp.com

Copyright and Licensing Information

Copyright © 1987–2016 by SoftPro, Raleigh, North Carolina.

No part of this publication may be reproduced in any form without prior written permission of SoftPro. For additional information, contact SoftPro, 4800 Falls of Neuse Road, Raleigh, NC 27609, or contact your authorized dealer.

Microsoft, Windows, and MS–DOS are registered trademarks of Microsoft Corporation in the United States and/or other countries. WordPerfect is a registered trademark of Corel Corporation. Crystal Reports is a registered trademark of SAP AG. HP LaserJet is a registered trademark of Hewlett Packard Development Company, L.P. GreatDocs is a registered trademark of Harland Financial Solutions Incorporated. RealEC Technologies, Inc. is majority owned by Lender Processing Services. All other brand and product names are trademarks or registered trademarks of their respective companies.

IMPORTANT NOTICE – READ CAREFULLY

Use of this software and related materials is provided under the terms of the SoftPro Software License Agreement. By accepting the License, you acknowledge that the materials and programs furnished are the exclusive property of SoftPro. You do not become the owner of the program, but have the right to use it only as outlined in the SoftPro Software License Agreement.

All SoftPro software products are designed to ASSIST in maintaining data and/or producing documents and reports based upon information provided by the user and logic, rules, and principles that are incorporated within the program(s). Accordingly, the documents and/or reports produced may or may not be valid, adequate, or sufficient under various circumstances at the time of production. UNDER NO CIRCUMSTANCES SHOULD ANY DOCUMENTS AND/OR REPORTS PRODUCED BE USED FOR ANY PURPOSE UNTIL THEY HAVE BEEN REVIEWED FOR VALIDITY, ADEQUACY AND SUFFICIENCY, AND REVISED WHERE APPROPRIATE, BY A COMPETENT PROFESSIONAL.

Table of Contents

SoftPro 360 User Guide 5

Accessing SoftPro 360 5

Registration 5

Sign in 6

Change Password 6

Forgot Password 8

About Screen 8

SoftPro 360 Services Menu 9

Services Menu (Standard & Enterprise Version) 9

Menu Items 9

Services Menu (Select Version) 10

Menu Items 10

Services Window (All versions) 10

Buttons 10

Working with Transactions 11

Submitting A Transaction 11

The Queue 11

Buttons 12

Columns 13

Favorite Views 13

Reviewing a Transaction 13

Ready Transaction Review 14

New Transaction Review 14

Buttons 15

Modify New Values 15

Buttons 16

Changing the View of the Queue 16

View Editor/New View 16

Buttons 16

View Editor Grid 17

Viewing the Log 17

Buttons 18

Searching for a Transaction 18

SoftPro 360 Administration 19
Buttons 19
Permissions 19
SoftPro 360 Client Profile 20

SoftPro 360 User Guide

SoftPro 360 is included with your ProForm license. SoftPro 360 is a revolutionary product which enables requesting services and receiving orders from third party providers directly within the ProForm workspace. When using SoftPro 360 the information in your ProForm order can be synchronized with providers with no dual keying.

Accessing SoftPro 360

Registration

1. To register for SoftPro 360, click **Login** (see Classic Login or Select Login); this screen will display:

2. Click **Register New Account**. The following screen will display:

3. Enter your **full name**, **email address**, then **confirm** your email address.
4. Click **Register**.
5. You will receive a notification from that your account has been created and your password will be emailed to you. This is a temporary password that will need to be changed.

Sign in

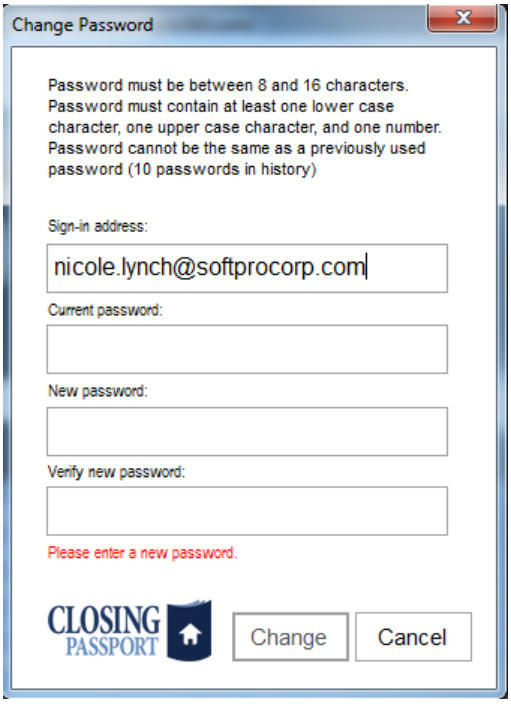
1. To Sign in to SoftPro 360, click **Login** (see Classic Login or Select Login), and enter your **email address** and **password**.

   - **First time sign in**: with new user registration, users are supplied a temporary password that must be changed upon first time login (see Change Password below).
2. Check the **Remember Credentials** box to have SoftPro 360 remember your email address (user name).
3. Click **Sign In**: Your email address and password will be validated and you will be logged in to SoftPro 360.

Change Password

1. To change your SoftPro 360 password, click **Change Password** on the Login screen.

2. Enter your **old password** (or temporary password provided upon registration), your **new password** (note the password requirements), and then **re-enter your new password** in the **Verify New Password** field:



3. Click **Change**.

Forgot Password

In the event that a user forgets their password, click **Forgot my sign-in info** on the Login screen. A temporary password will be emailed to you, and upon log in you will be prompted to complete the Change Password process.

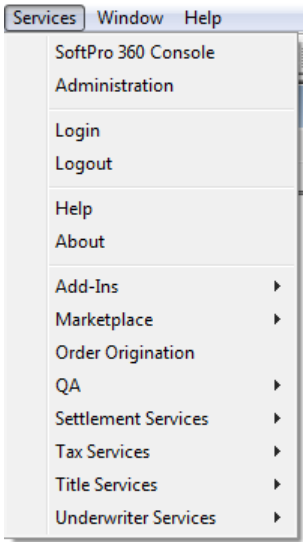
About Screen

The **SoftPro 360 About Screen** provides information about the **registered user**, **customer serial number**, **version**, **server address**, **security address**, and **connection status**. In the event that the connection status displays an error, a hyperlink will display. Use **Click here for help** to troubleshoot.

SoftPro 360 Services Menu

Services Menu (Standard & Enterprise Version)

SoftPro 360 adds a menu to the tool bar labeled Services which lists features available to the user.

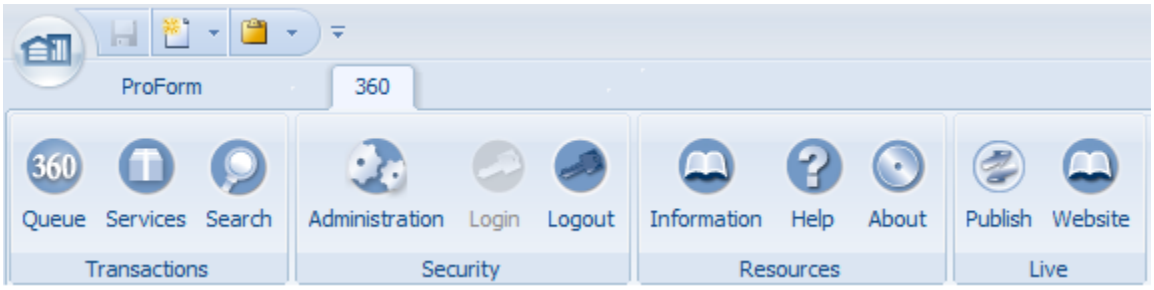


Features listed in the Services Menu include, opening the SoftPro 360 Console, submitting a service request to a Provider and managing SoftPro 360 administration. The SoftPro 360 Console is the primary workspace for SoftPro 360. The Console displays all available Services, Providers and the Queue, which displays a customizable view of transactions. To open the 360 console, select SoftPro 360 Console from the Services menu.

Menu Items

- **SoftPro 360 Console**: Primary workspace for 360; shows Providers, Services, and the queue
- **Administration**: SoftPro 360 Administration allows management of permissions, Services, and views for users
- **Login**: Allows you to manually log in; this will only be used if you have manually logged out of SoftPro360
- **Logout**: Allows you to log out of SoftPro 360
- **Help**: Launches the SoftPro 360 Website where you can review various help topics
- **About**: Displays registered user name and version of SoftPro 360 installed on your workstation

Services Menu (Select Version)



SoftPro 360 adds a new tab to the ribbon labeled 360 which lists features available to the user. Features in the SoftPro 360 ribbon include, opening the SoftPro 360 Queue, accessing available Services to submit a request to a Provider, and managing SoftPro 360 administration.

Menu Items

- **SoftPro 360 Queue**: Primary workspace for 360; shows Services, Providers, and the queue
- **Services**: Shows available Services
- **Search**: Launches the search screen
- **Administration**: Launches SoftPro 360 Administration (allows the management of permissions, Services, and views for users)
- **Login**: Allows you to manually log in; this will only be used if you have manually logged out of SoftPro360
- **Logout**: Allows you to log out of SoftPro 360
- **Information**: Launches the SoftPro 360 homepage where you can access tips, news, and featured Services
- **Help**: Launches the SoftPro 360 Website where you can review various help topics
- **About**: Shows the registered user and version of SoftPro 360 installed on your workstation
- **Publish**: Launches the Transaction Management service
- **Website**: Provides access to the Transaction Management website

Services Window (All versions)

The Services window will show all available Services and Providers.

Buttons

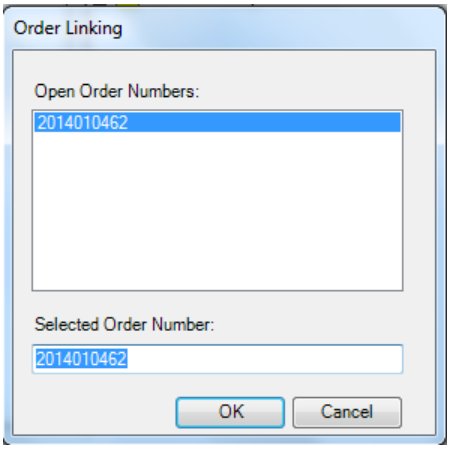
- **Submit**: Launches the highlighted service to submit an order request.
- **About**: Displays a description for the highlighted service.

Working with Transactions

Submitting A Transaction

Highlight the service you wish to order in the list, for example Lien Release, and click Submit. You can also double click on the service to launch the order request screen.

Most transactions must be linked to a ProForm order. To link a ProForm order, it must be entered in the Selected Order Number field on the Order Linking scren. If you have a ProForm order open, it will be listed under the Open Order Numbers section and in the Selected Order Number field. If you have multiple ProForm orders open, they will all be listed here. The active order will be highlighted and entered in the Selected Order Number field. You can highlight another order number as the Selected Order Number, and you can overwrite the Selected Order Number with an order that is not currently open by typing the order number in the Selected Order Number field.

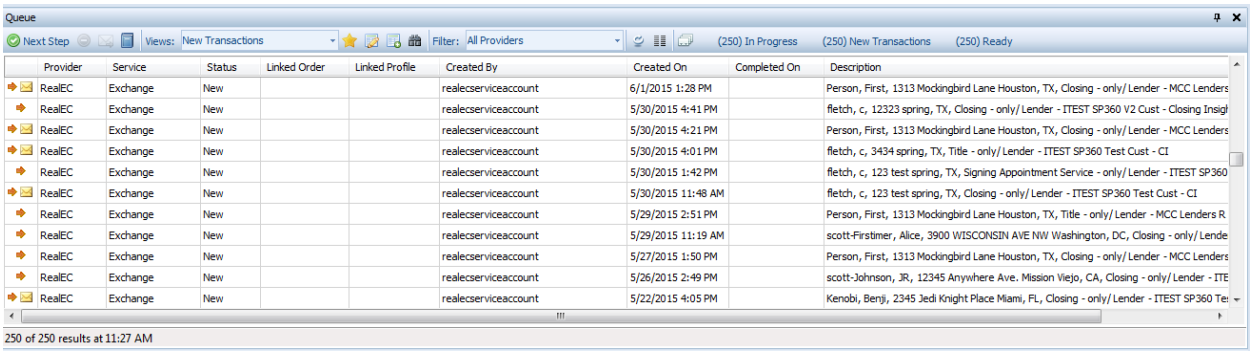


The screens following order linking will vary depending on the service. For additional help, access the SoftPro 360 Start Page, click on Providers, locate the provider/service you need assistance with and click the link “How to Submit a Transaction.”

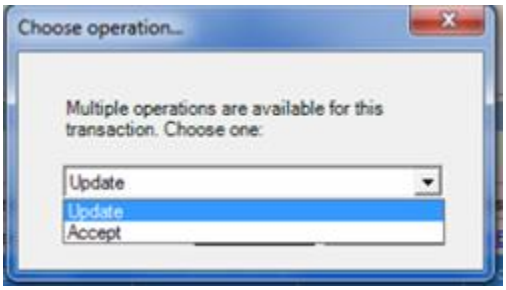
The Queue

The Queue displays a customizable view of SoftPro 360 transactions. To open the Queue in SoftPro Select, click the Queue button on the SoftPro 360 ribbon. In SoftPro Classic, the Queue is visible within the SoftPro 360 console.

Users have the option of using default views or creating custom views to show specific types of transactions. The buttons available for each transaction are dependent on the Provider’s support of that specific feature. “Ready” or “New” transaction information supplied by the Provider can be viewed by clicking the Next Step button. Users can also use this button to Accept or Reject the values and/or documents supplied by the Provider, depending on the Provider. Accepted information will flow into the linked ProForm order and replace any existing values.



In certain products, the Next Step button may bring up an additional dialog should there be multiple actions available. For example, the user may see “Update” or “Accept.”



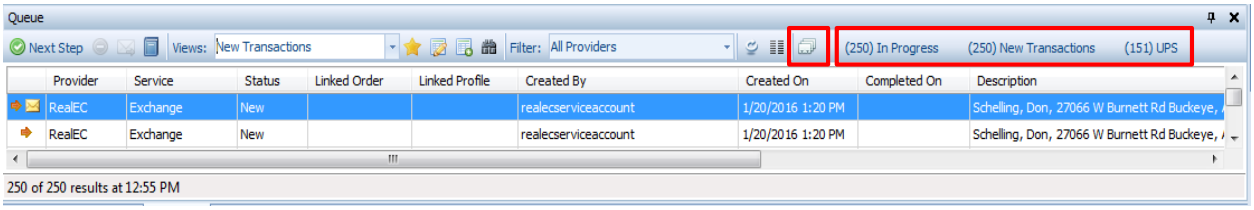
Buttons

- **Next Step**: Allows you to view, accept, (or reject- depending on the Provider) information that has been received from the Provider
- **Cancel**: Cancels the transaction; only available if supported by the Provider
- **Message**: Allows the user to send a message; only available if supported by the Provider
- **Log**: Opens the log viewer, which shows events and messages for the highlighted transaction
- **Views**: Dropdown displaying public and private views you have permission to view
- **Default View**: Sets the currently selected view as your default
- **New View**: Allows the user (with permission) to create a new view of the queue
- **Edit View**: Allows the user (with permission) to modify the currently selected view of the queue
- **Search**: Opens the search screen which displays fields used to search for a specific SoftPro 360 transaction
- **Filter**: Dropdown allows you to change the current view to show transactions only from the selected Provider; by default it will show All Providers
- **Refresh**: Forces the Queue to refresh immediately; queue automatically refreshes every 60 seconds
- **Columns**: Displays a list of columns that can be enabled or disabled
- **Favorite Views**: Brings up a list of all default and custom views. Select up to three as “Favorite Views”. The selected views will appear as buttons on the Toolbar for easy access.

Columns

- **Direction**: Shows if the transaction is
  - Inbound: (a transaction requested from a Provider) or
  - Outbound: (a transaction that has been submitted to a Provider)
  - Update: Displays when a new message is available in the transaction log
- **Transaction Number**: SoftPro 360 transaction number
- **Provider**: Shows the Provider name for this transaction
- **Service**: Shows the Service name for this transaction
- **Status**: Indicates the current state of the transaction, varies by provider
- **Linked Order**: Shows the ProForm order number for this transaction, when applicable
- **Linked Profile**: Shows the ownership profile for the linked ProForm order
- **Created By**: Shows the user name that created the transaction
- **Created On**: Shows the date and time the transaction was created
- **Completed On**: Shows the date and time the transaction was completed
- **Category**: Shows the category of this transaction
- **Provider Transaction Number**: Some Providers may utilize their own reference number; this number is not required, and may not show for all transactions
- **Sent To**: Displays information on where this transaction was sent; this may show a reference number or a name
- **Description**: Displays a brief description of this transaction, where applicable

Favorite Views



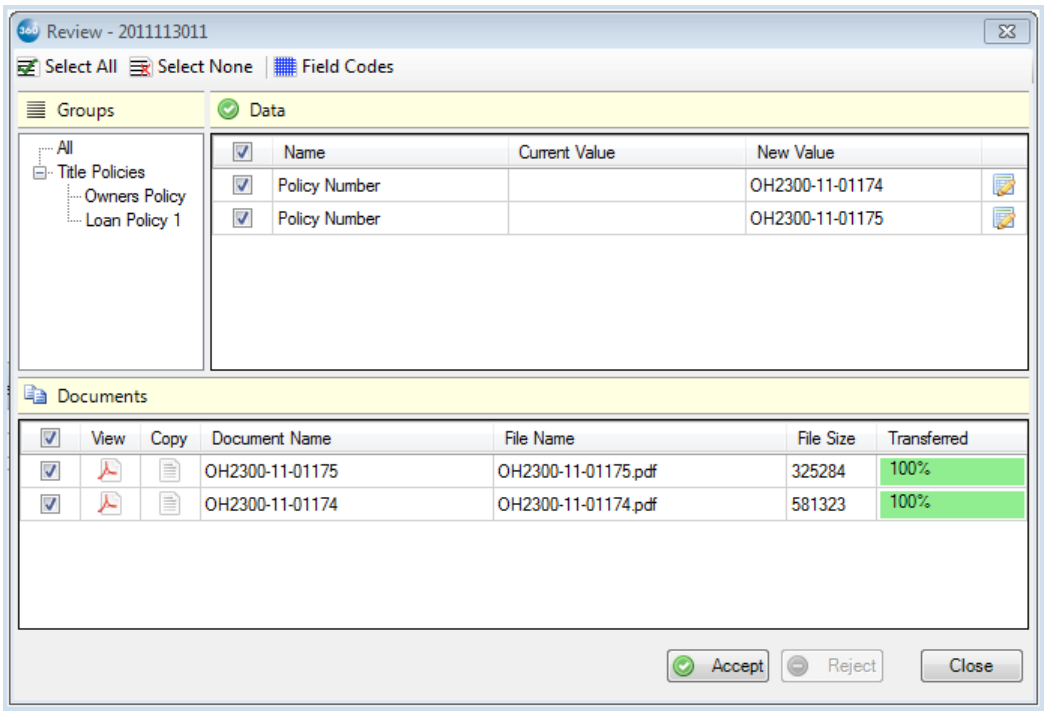
- The **Favorite Views** feature on the 360 Queue allows users to designate up to three views as "Favorite Views".
- You can change which **Favorite Views** appear at any time by clicking the **Favorite View icon** .
- **Selected views** will appear as text links on the 360 Queue Toolbar. Users can quickly and easily manage their lists of transactions for their most frequently used views.
  - The **number of transactions** in each view will appear next to each **Favorite View** name.

Reviewing a Transaction

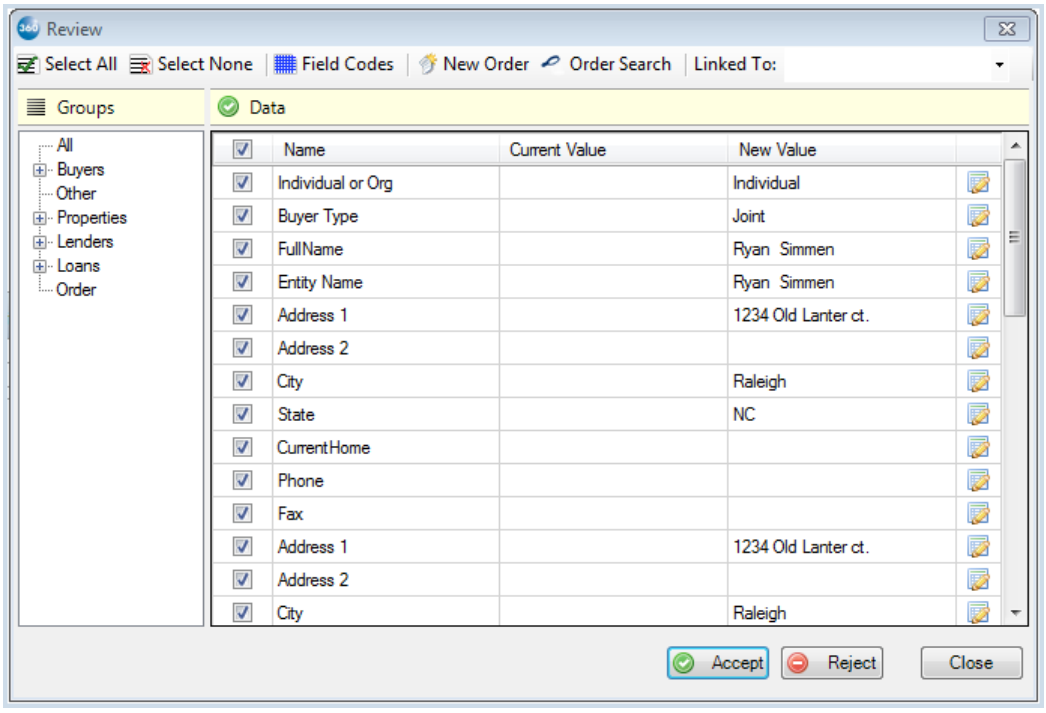
Transactions that are in a Ready, New, or Updated (depending on the Service / Provider) status can be reviewed. To view information about the transaction, double click the transaction, or highlight the

transaction and click the Review button in the Queue. The Review screen will vary depending on the information specific to the transaction.

Ready Transaction Review



New Transaction Review



Buttons

- **Select All**: Selects all new values, marking them with a check
- **Select None**: Deselect all new values, removing the check
- **Field Codes**: Displays field codes associated with the current and new values (if applicable for the Provider)
- **New Order**: Create a new ProForm order to which you can link the transaction; applies to New Transactions
- **Order Search**: Search for an existing ProForm order to which you can link the transaction; applies to New Transactions
- **Linked To**: Select a ProForm order that is currently open from the drop down box; applies to New Transactions
- **Accept**: Accept all selected new values for the transaction
- **Reject**: Reject the transaction (if applicable for the Service / Provider)
- **Close**: Closes the review screen without accepting or rejecting the transaction

The transaction information received from the Provider will be grouped into sections on the left side of the screen. Selecting a section will allow you to view the current values that exist in the ProForm order and the new values sent by the Provider. Click the Field Codes button to display a column that shows the ProForm field codes that will be updated by the new values. Click the Field Codes button again to remove this column.

You can choose to Select All or Select None of the new values in a section. Or you can select the new values one at a time. When you Accept the transaction, all selected values will replace any existing values within the ProForm order. If you Reject the transaction, the entire transaction is rejected and closed. After you have accepted or rejected a transaction, the review screen closes and you will no longer be able to change the values for this transaction.

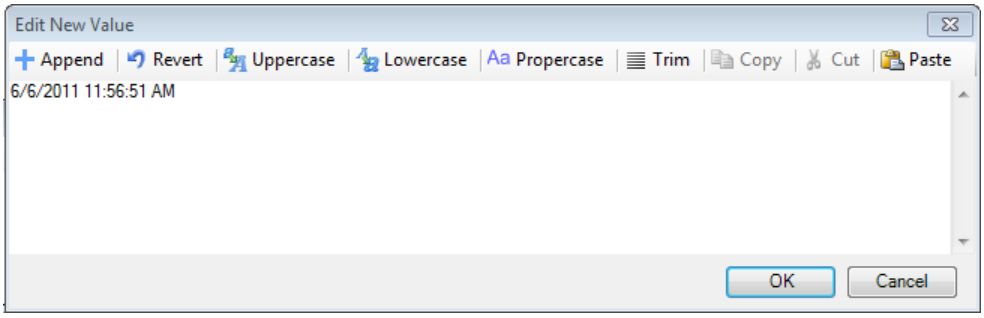
Modify New Values

Replacement values can be modified prior to accepting the transaction.

Click the “Edit Value” icon beside the new value you wish to modify.

Click in the text box that displays the new value.

Make the applicable changes.



The edit buttons can assist you in modifying the information returned from the Provider.

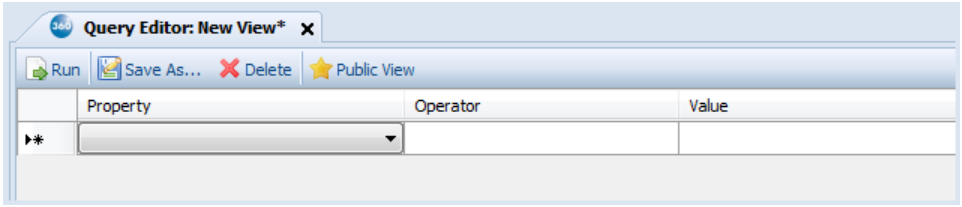
Buttons

- **Append**: Add the new value to the current value
- **Revert**: Undo the most recent changes since opening the "Edit New Value" window
- **Uppercase**: Capitalize all letters
- **Lowercase**: Lowercase all letters
- **Propercase**: Capitalize the first letter of each word
- **Trim**: Remove any space at the beginning or end of the text
- **Copy**: Copy the selected text to the Clipboard
- **Cut**: Cut the selected text to the Clipboard
- **Paste**: Paste the contents of the Clipboard into the text field

Changing the View of the Queue

View Editor/New View

The New View and Edit View buttons allow you to create new views or modify existing views of the queue. When you click the New View or Edit View buttons the view editor is launched.

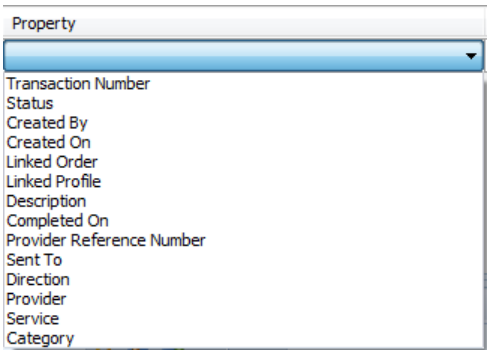


Buttons

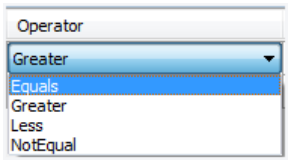
- **Run**: Prompts you to save the view, if not done previously, including naming the view; updates the Queue and displays the edited/new view results
- **Save As**: Prompts you to save the view with a new name; saves the view as a new view
- **Delete**: Prompts you to confirm action; deletes the view.
- **Public View**: Sets the view to be visible by all users.

View Editor Grid

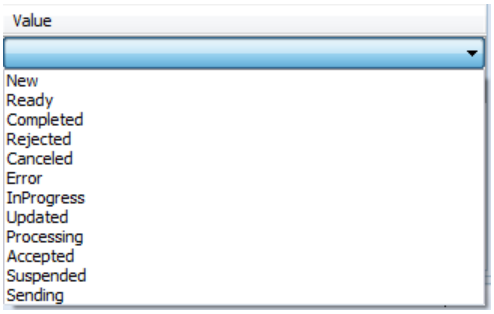
Click on the Property dropdown to select the property (the column that you view in the queue) that you wish to view results based on.



The drop down for operator will show available options. Select the desired Operator.



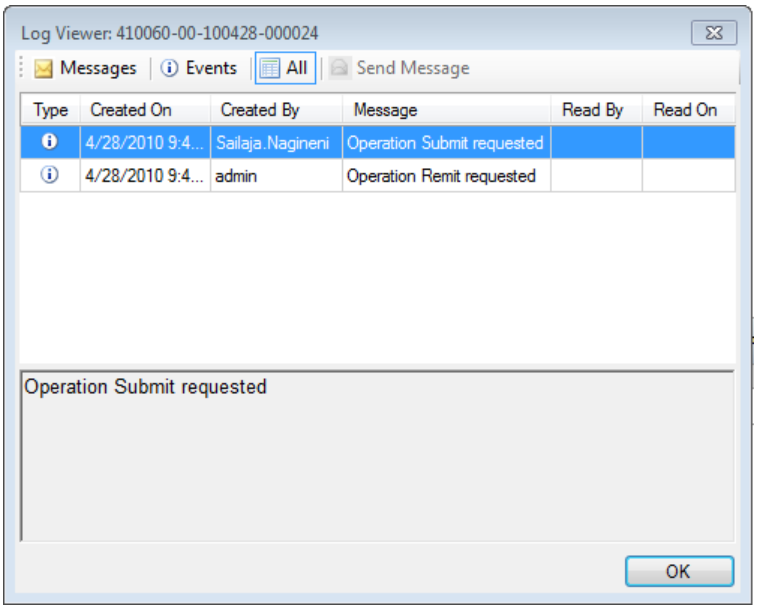
Based on the Property selected, a drop down may display in the Value field. Or you can type the desired Value directly in this field.



Once you have entered all criteria, click Run to save the view (and give it a name if it is a new view). The view will then display the view results in the queue, and view will be available in the drop down box (for all users if public view was chosen)

Viewing the Log

The Log displays events and messages for the current transaction. Providers may support inbound and/or outbound messages for a particular Service. These messages, along with transaction events, will be available in chronological order in the log for review.

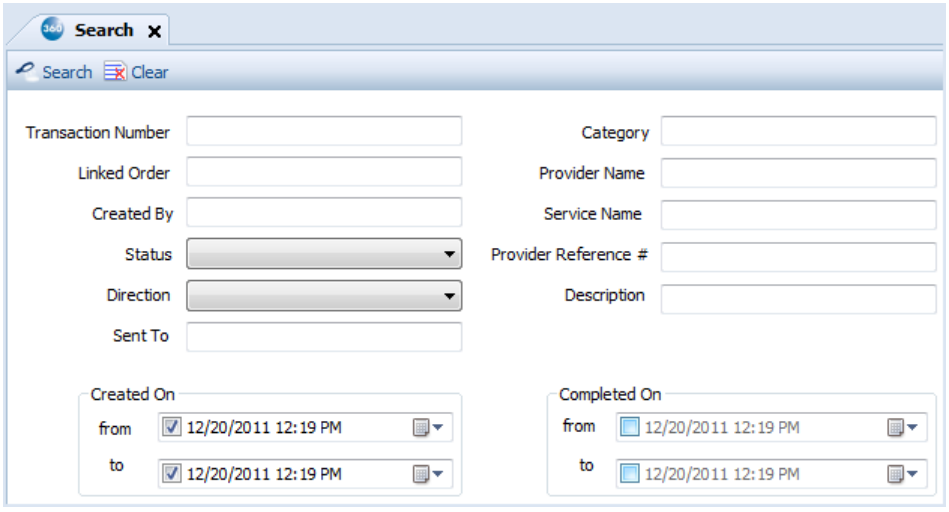


Buttons

- Messages: View messages only
- Events: View events only
- All: View messages and events
- Send Message: Send a message to the Provider; if supported by Provider
- OK: Closes the log viewer

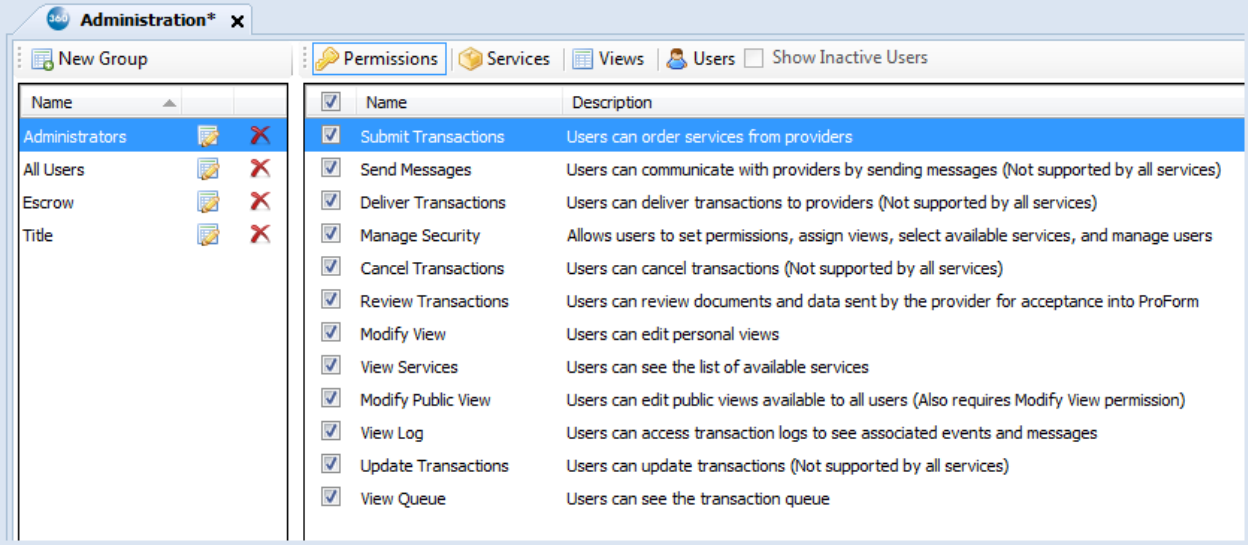
Searching for a Transaction

To find a specific SoftPro 360 transaction, enter criteria into the search screen and click the Search button. The search results will display in the queue as a temporarily view. To remove any previously entered search criteria, press the Clear button to clear all search fields.



SoftPro 360 Administration

SoftPro 360 Administration can be used to manage SoftPro 360 permissions, Services, and views for users.



Buttons

- **New Group**: Create a new group into which users can be placed
- **Edit Group**: Rename the selected group
- **Delete Group**: Remove the selected group
- **Permissions**: Allows the administrator to manage permissions for groups in SoftPro 360
- **Services**: Allows the administrator to select Services available per group
- **Views**: Allows the administrator to select views available per groups
- **Users**: Displays all active users
    - Click the "Active" hyperlink to deactivate a user; to reactivate a deactivated user, click the "Inactive" hyperlink
    - Check the "Show Inactive Users" box to display all users, including inactive

Select the group you wish to assign permissions, Services and/or views to. Click the button for the section you wish to administer, for example Permissions. Check the box beside the permission you wish to assign to the selected group.

Permissions

- **Submit Transactions**: Users can order Services from Providers
- **Send Messages**: Users can communicate with Providers by sending messages (not supported by all Services)
- **Deliver Transactions**: Users can deliver transactions to Providers (not supported by all Services)
- **Manage Security**: Allow users to set permissions, assign views, select available Services and manage users

- **Cancel Transactions**: Users can cancel transactions (not supported by all Services)
- **Review Transactions**: Users can review documents and data sent by the provider for acceptance into ProForm
- **Modify View**: Users can edit personal views
- **View Services**: Users can see the list of available Services
- **Modify Public View**: Users can edit public views available to all users (also required Modify View permission)
- **View Log**: Users can access transaction logs to see associated events and messages
- **Update Transactions**: Users can update transactions (not supported by all Services)
- **View Queue**: Users can view the SoftPro 360 transaction queue

SoftPro 360 Client Profile

The SoftPro 360 client caches some data on the user's local machine. By default the SoftPro 360 client utilizes the user's roaming profile for this cache. If the local profile is preferred this setting can be overwritten by creating a new text file called "SoftPro360.config". Include the following in the file:

```
<?xml version="1.0" encoding="utf-8"?>
<configuration>
  <appSettings>
    <!-- Values: LocalAppData | RoamingAppData -->
    <add key="CacheStorage" value="LocalAppData"/>
  </appSettings>
</configuration>
```

Save the file to the root folder of the client application (for example: "C:\Program Files (x86)\SoftPro\Enterprise\Client\" or "C:\Program Files (x86)\SoftPro\Select\"). Restart the client and the new setting will take effect.