



Simplifile®

December 15, 2017

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Introduction

Simplifile® is an e-recording solution that allows settlement providers to record documents electronically in over 1700 counties. With the SoftPro® 360 Simplifile service, executed documents can be sent for recording directly from a ProForm order. When recorded, the documents can be attached to the order and the recording data imported to the appropriate ProForm fields, thereby eliminating the need for manual scanning and data entry. Additional features allow Select users to automate transaction activity and import actual recording fees and transfer taxes for reconciliation against collected fees.

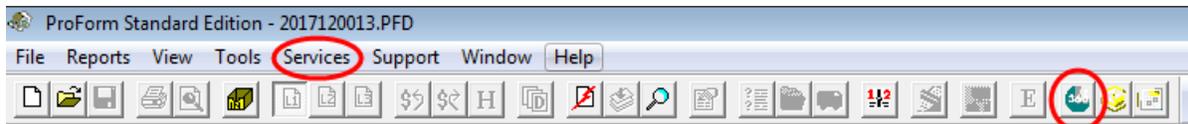
Sending Documents for e-Recording

Opening the Integration

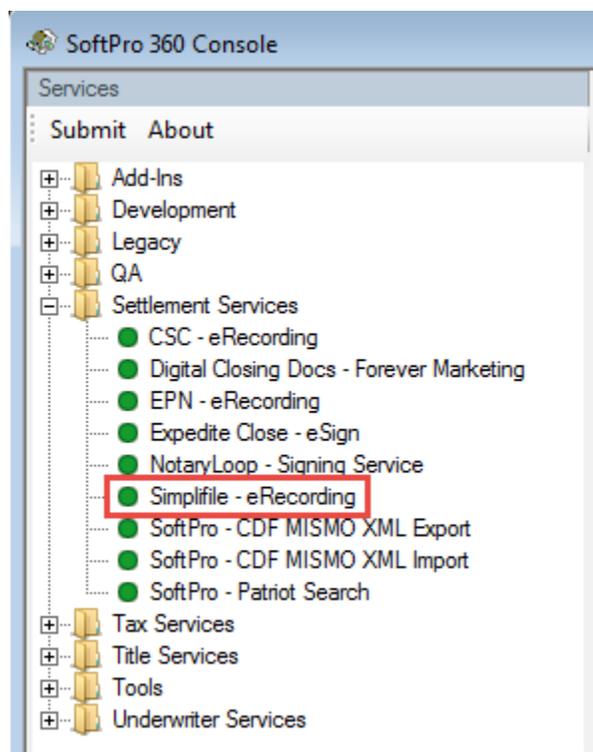
Locating the Service

Standard and Enterprise

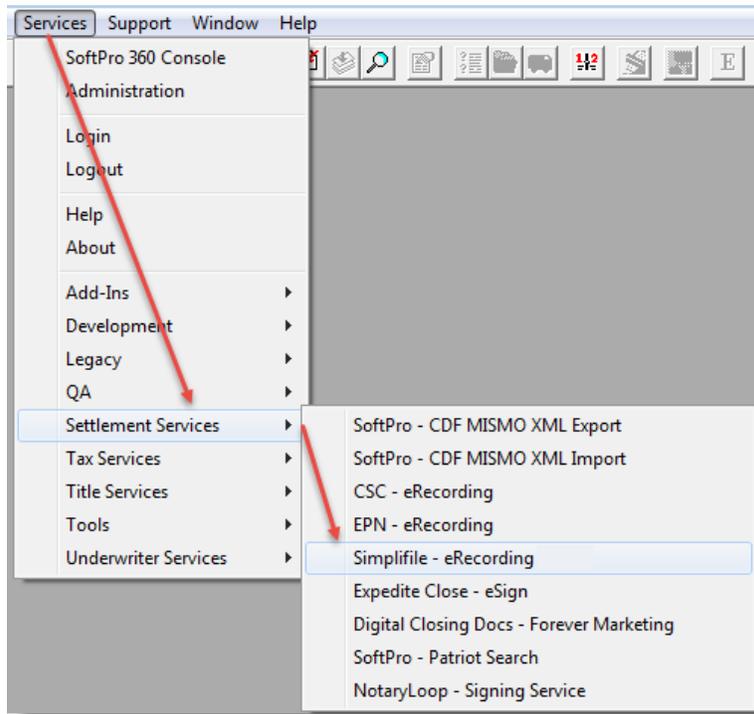
1. There are two ways to access a service in the **Standard** and **Enterprise** versions of ProForm.



- a. Clicking the **360** button opens the **SoftPro 360 Console** with the **Services** menu on the left side of the screen. In the expanded **Settlement Services** section, double-click on **Simplifile – eRecording**.



- b. Clicking **Services** from the toolbar opens a dropdown menu for **360**. Hover over **Settlement Services** and click on **Simplifile – eRecording**.

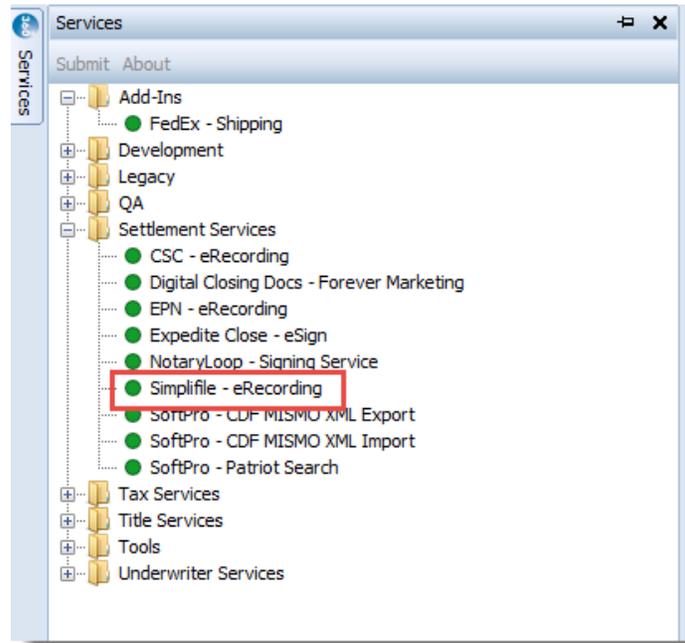


Select

1. Click the **360** tab and then the **Services** button on the 360 ribbon to open the Services tree.

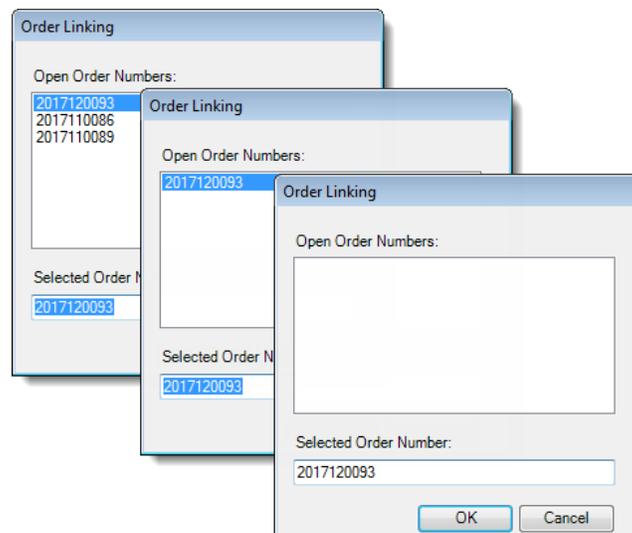


- Expand the **Settlement Services** section and double-click on **Simplifile – eRecording**.



Order Linking

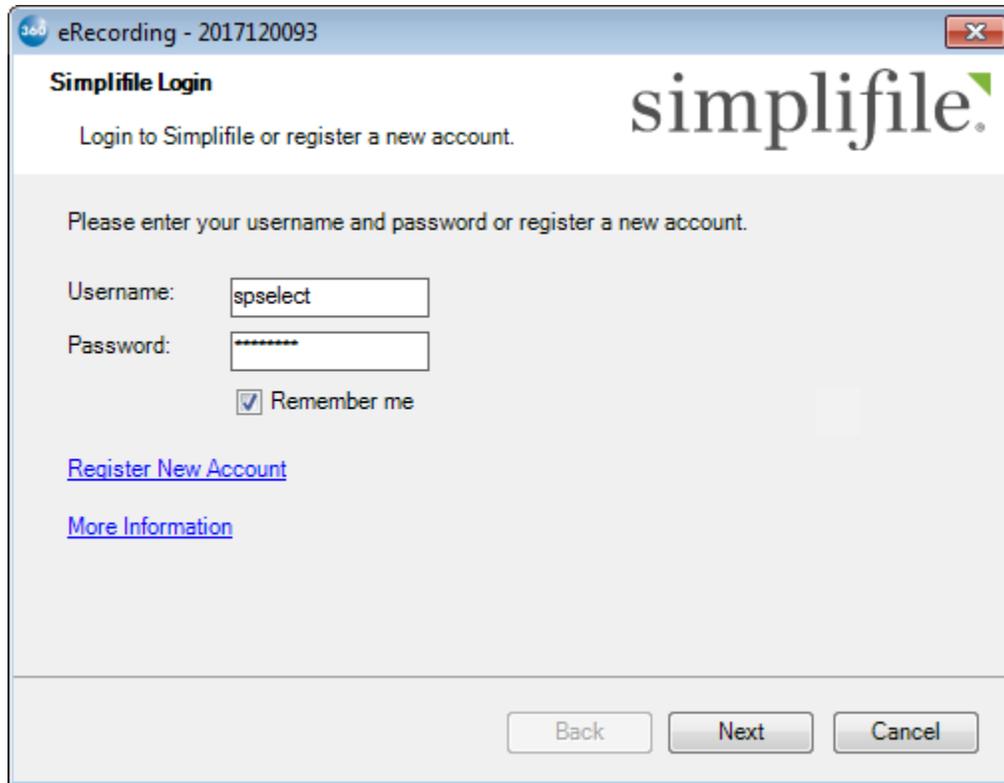
- In the Order Linking window:
 - If multiple orders are opened, select the corresponding order number from the list.
 - If a single order is opened, only that order number is displayed.
 - If no orders are opened, enter the order number in the **Selected Order Number** field.



- Click **OK** to open the **Login** window.

Login Screen

1. In the **Simplifile Login** window, enter the **Username** and **Password** provided by Simplifile when the user's account was set up.



eRecording - 2017120093

Simplifile Login

Login to Simplifile or register a new account.

Please enter your username and password or register a new account.

Username:

Password:

Remember me

[Register New Account](#)

[More Information](#)

Back Next Cancel

- a. If no account has been set up with Simplifile, clicking on the **Register New Account** link opens a Simplifile web page where a user can set up a Simplifile account.
 - b. Checking the **Remember Me** checkbox will save the **Username** and **Password** so that these will be present the next time a user opens the Simplifile service in 360.
2. Click the **Next** button to open the **Select a County** window.

Selecting County and Cost Center

The first combo box in this window contains a list of all the counties to which the user can send documents for recording. This list is managed by Simplifile. If the Order has a county and state entered for a property, and the user's account has been set up for that county in Simplifile, then the box displays the property county and state from the Order.

eRecording - 2017120013

Select a County

Select a county for e-recording.

Please select a county you would like to use for e-recording.

Pierce County (WA)

Auto-populates based on property county and state in ProForm

Please select a cost center you would like to use for e-recording.

1st Advantage Abstract LLC

[Add counties or update account information on Simplifile's website](#)

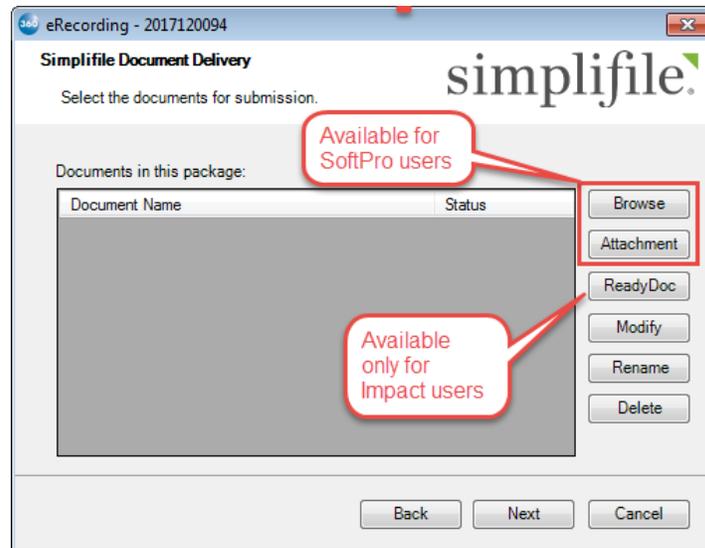
Back Next Cancel

The cost centers listed in the second combo box are also managed by Simplifile. If a user's account has access to more than one cost center, the user can select the cost center to which the recording fees and charges will be invoiced by Simplifile. The cost center selected by the user will be saved so that the next time a user opens the Simplifile service, that cost center will be selected by default.

Adding Documents to a Recording Package

Adding a Single Document

Documents for recording are added and managed in the **Simplifile Document Delivery** screen. Selecting the **Browse** button opens Windows Explorer so the user can add a document to the package from a location outside of ProForm. Selecting the **Attachment** button opens to the Order **Attachments** or **SPIImage** so the user can add a document from within the Order. Only a .pdf, .tif or .tiff document can be added.



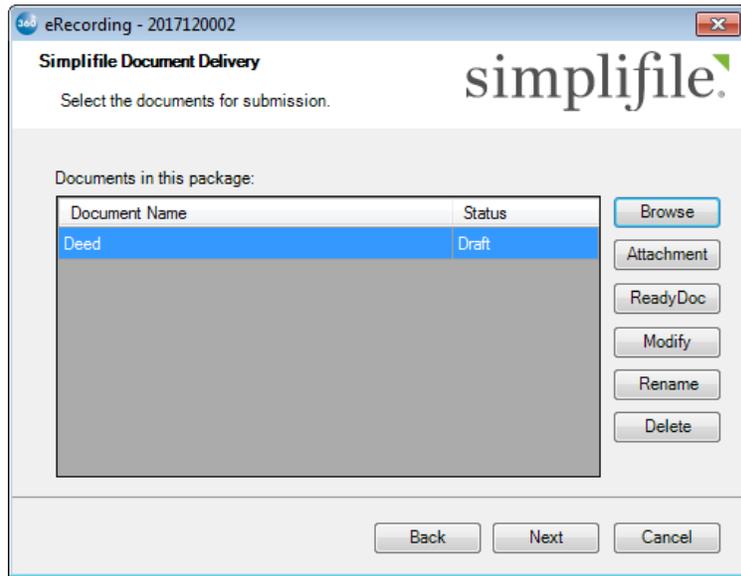
Adding Multiple Documents

After the user selects a document to add to the recording package, a series of screens will allow the user to manage how the document will be recorded and review what, if any, data from the Order will be sent to Simplifile as part of the recording process. The workflow is as follows:

1. Select a county document type;
2. Select a ProForm document type; and
3. If required by the county for the selected county document type,
 - a. Review or edit certain Order data;
 - b. Select or add Grantors and Grantees; and
 - c. Add a Helper Document.

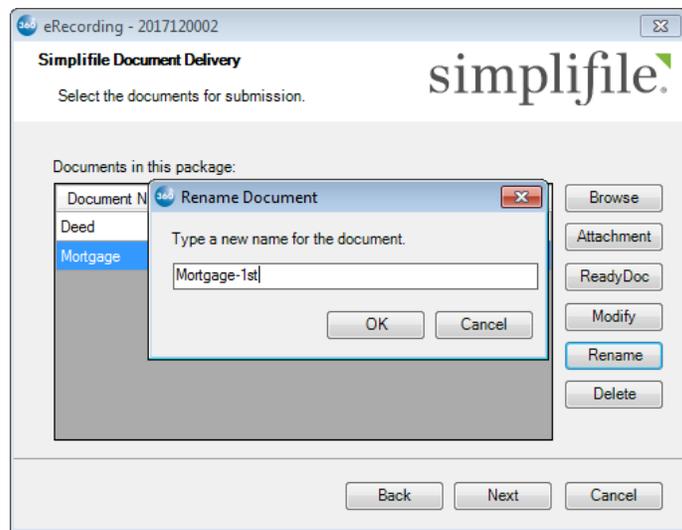
This workflow applies to each document added to the recording package. After this workflow is completed, the user is returned to the **Simplifile Document Delivery** screen which now displays the

Document Name with the **Status** for recording.



To add another document to the package for recording, the user selects **Browse** or **Attachment** to select the document, and proceeds through the workflow until the user is returned again to this **Document Delivery Screen**. This process is repeated until the user has added and configured all the document desired for the recording package.

Selecting **Modify** opens the workflow process for the selected document to allow the user to review or make changes to the selections and data. The user can also **Rename** a document in this screen.

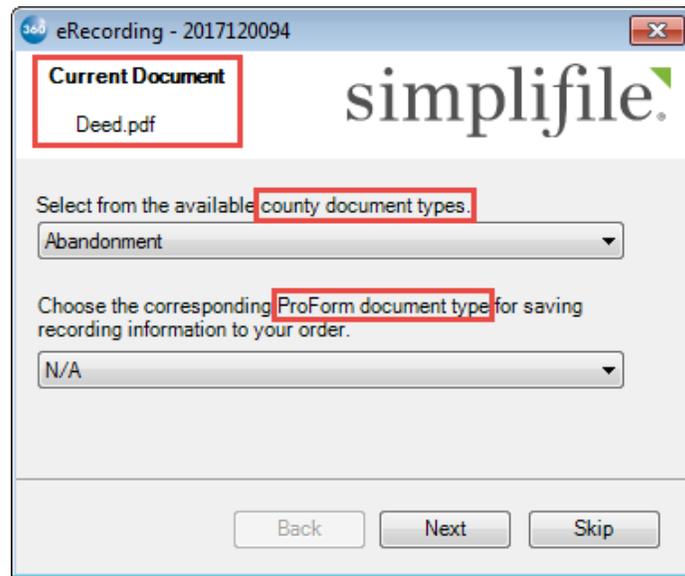


And the **Delete** button removes the selected document from the grid.

The following sections explain the workflow to set up each document for recording.

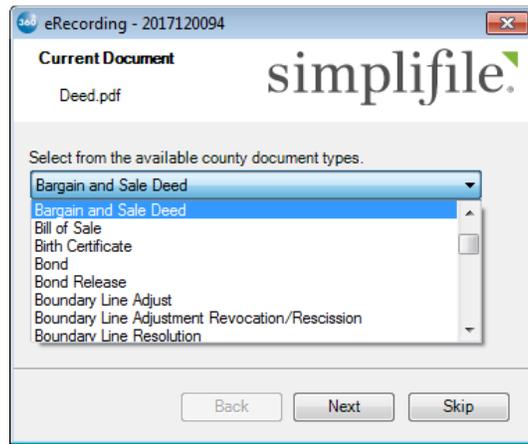
Selecting Document Types

Adding a document opens the document type selection window. In this window, the user selects the county document type and the ProForm document type. The document file name will be displayed in the header to show to which document these selections will apply.



County Document Type

The first combo box lists all the document types that the county supports for e-recording. This list is managed by Simplifile. Clicking on the box opens the list of document types. Clicking on it again closes the list. With the box open, the user can scroll through the list and click on the desired document type to select it.

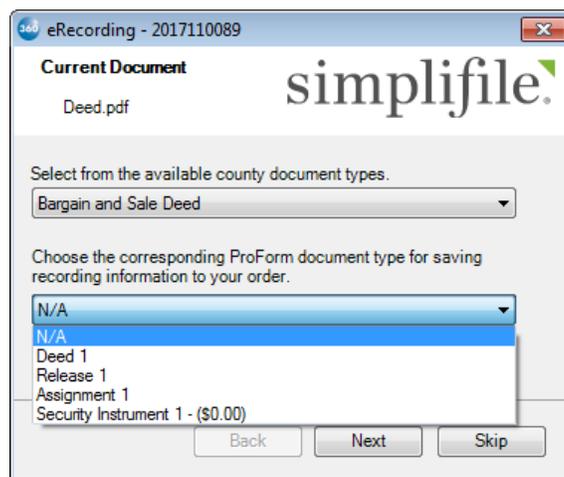


User Tip: If you know the county document type name, you can tab to or click on the box and type the first few letters of the name to quickly navigate to the desired document type.

ProForm Document Type

In Select

The second combo box lists the documents in ProForm where recording information can be saved when the recorded document is returned. At minimum, this box will display the following choices: **N/A, Deed 1, Release 1, Assignment 1** and **Security Agreement 1**.



Screen Shot: 1: Two Assignments

Security Instruments

Riders

Assignments

Assignor Name	Assignee Name
Happy Financial Services, Inc.	Real Lending, Inc.
Bob T. Borrower, Jr. and Betty H. Borrower, husband and ...	Happy Financial Services, Inc.

Screen Shot 4: Two Existing Liens

Existing Liens

Existing Liens (2)

Priority	Borrower/Mortgagor	Lender/Mortgagee	Document Type	Existing Loan #
1	Best Builders, LLC	Wells Fargo Bank	Mortgage	98765843
2	Best Builders, LLC	Construction Lender, Inc.	Mortgage	

Instrument type:

MERS registration #:

Mortgagor/Mortgagee Information

Given by (Borrower/Mortgagor):

Lien Release Recording Information

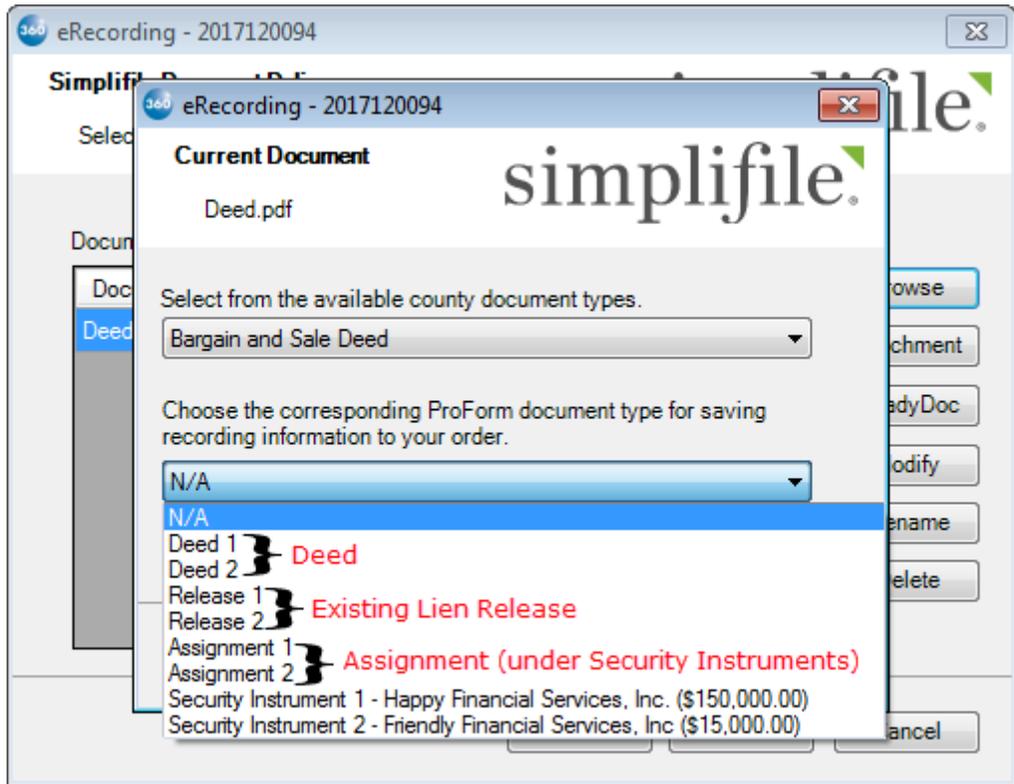
Dated: Date/Time recorded:

Recorded at/in:

Place recorded:

Place re-recorded:

Then the ProForm documents type combo box will list those document types as:



The user would select Deed 1 if the user wants the recording information to be imported to the recording fields for Deed 1.

The screenshot shows a window titled "Deeds (2)" with a table and several form fields below it. The table has three columns: "Instrument Type", "Grantor", and "Grantee".

	Instrument Type	Grantor	Grantee
1	Warranty Deed	Best Builders, LLC	Bob T. B...
2	Warranty Deed	Other Interested Party, Inc.	Bob T. B...

Below the table, there are several form fields:

- Instrument type: Warranty Deed (dropdown)
- Instrument date: 12/07/2017 (dropdown)
- Date/Time recorded: (None) (dropdown)
- Recorded at/in: (multiple empty text boxes)
- Place recorded: (empty text box)

A red box highlights the "Instrument date", "Date/Time recorded", and "Recorded at/in" fields.

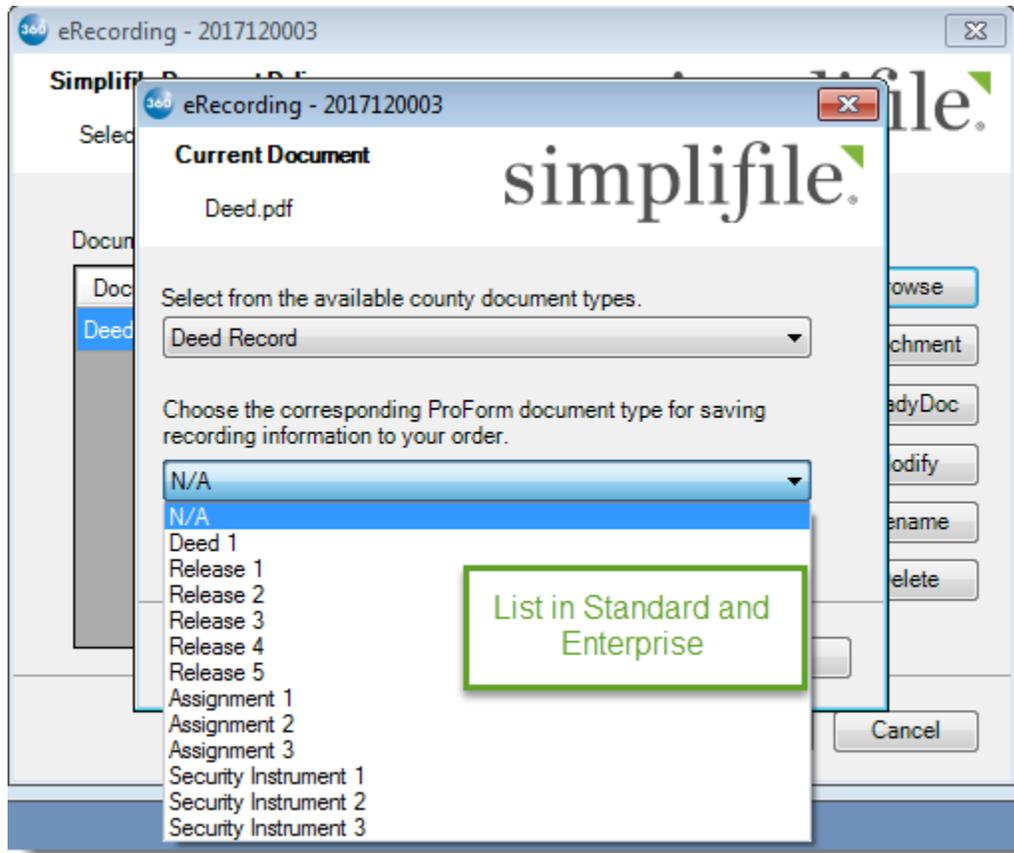
The screenshot shows a window titled "eRecording - 2017120094" with the Simplifile logo. It displays the following information:

- Current Document: Deed.pdf
- Select from the available county document types: Bargain and Sale Deed (dropdown)
- Choose the corresponding ProForm document type for saving recording information to your order: Deed 1 (dropdown)
- Buttons: Back, Next, Skip

Select the ProForm document type that corresponds to the document being recorded so that the recording information (recording date and time, book, page and/or instrument number) will be returned and imported into the Order in the correct recording data fields.

In Standard and Enterprise

Because of how ProForm works in the Standard and Enterprise versions, SoftPro 360 is unable to determine how many loans, assignments and releases are in an Order. As a result, the ProForm document type combo box lists all possible document types for an Order.



Therefore, it is important that the user select a ProForm document type that is available in the Order so that the recording data is imported correctly. For example, if there is only one Security Instrument in the Order (only an Order opened as a HUD type can have up to three loans/security instruments), selecting

Security Instrument 1 to record a mortgage would allow the recording data to be imported to the recording fields for the **Security Instrument** in ProForm:

If **Security Instrument 2** was selected, importing the recording data, when Accepting the recorded instrument, and the Order was a CD order, the data would have no place to go. A message would be displayed saying that the data could not be imported.

Recording data for **Assignments** would be imported to the **1st Loan – Assignments**.

Recording other document types using “N/A”

ProForm doesn't have recording data fields for document types like powers of attorney, leases, and UCC Financing Statements. For these document types, the user may select **N/A** in the ProForm document type list. When **N/A** is selected, only the recorded document and recording fees will be returned for importing into the Order

County Requested Information

Some counties require data to be sent with a document for the document to be recorded. Based on the County document type selected (see *County Document Type*, above), Simplifile communicates with SoftPro 360 to tell the user what data from an Order is required.

Party Information: Grantors and Grantees

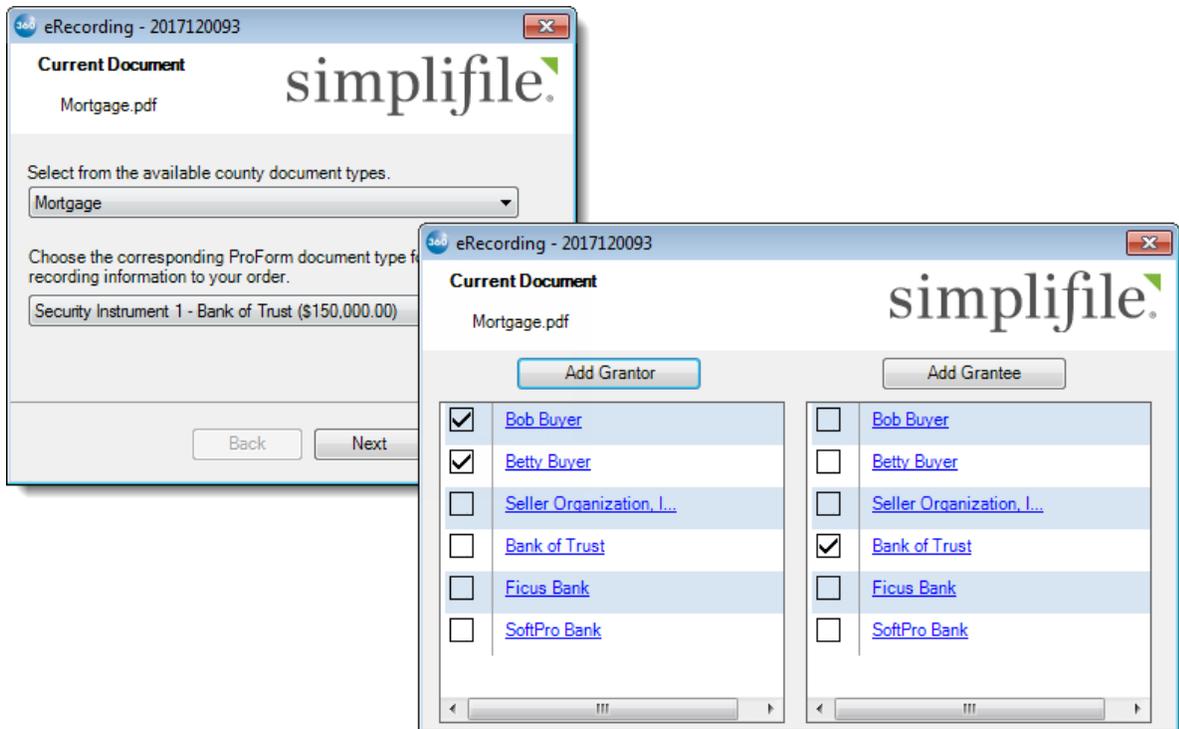
A grantor and grantee window opens when the county requires the names and addresses of the parties to a document. All Buyer, Seller and Lender contacts from the Order will be listed as Grantors and Grantees. If the ProForm document type selected is a Deed, then by default, the Seller contacts will be checked as Grantors and the Buyer contacts will be checked as Grantees.

The screenshot shows a software window titled "eRecording - 2017120093" with the Simplifile logo. The window displays "Current Document" as "Deed.pdf". It is divided into two main sections: "Add Grantor" and "Add Grantee".

Grantor Selection	Grantee Selection
<input type="checkbox"/> Bob Buyer	<input checked="" type="checkbox"/> Bob Buyer
<input type="checkbox"/> Betty Buyer	<input checked="" type="checkbox"/> Betty Buyer
<input checked="" type="checkbox"/> Seller Organization, L...	<input type="checkbox"/> Seller Organization, L...
<input type="checkbox"/> Bank of Trust	<input type="checkbox"/> Bank of Trust
<input type="checkbox"/> Ficus Bank	<input type="checkbox"/> Ficus Bank
<input type="checkbox"/> SoftPro Bank	<input type="checkbox"/> SoftPro Bank

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

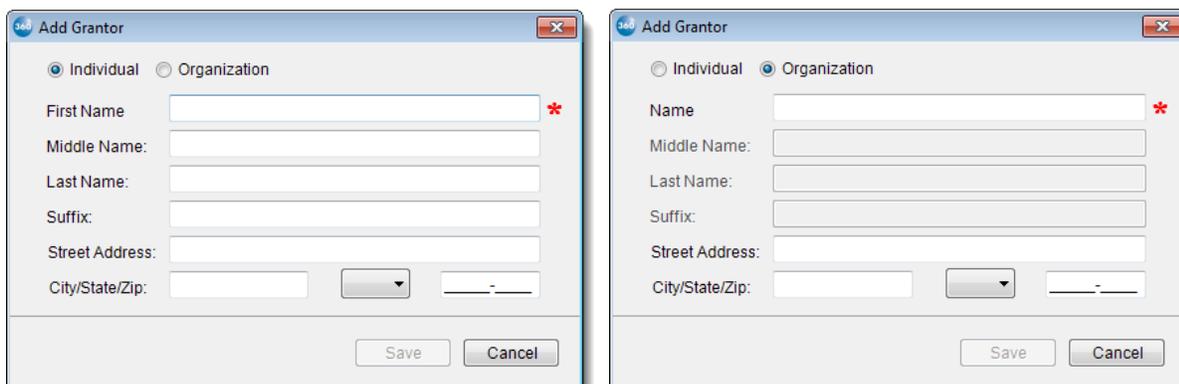
If the ProForm document type selected is a Security Instrument, then by default, the Borrower/Buyer contacts will be checked as Grantors and the Lender contact associated with that Security Instrument will be selected as the Grantee.



For **Releases, Assignments** and **N/A**, no contacts will be checked by default so that the user can select the correct contacts to send to the county.

Adding Grantors and Grantees

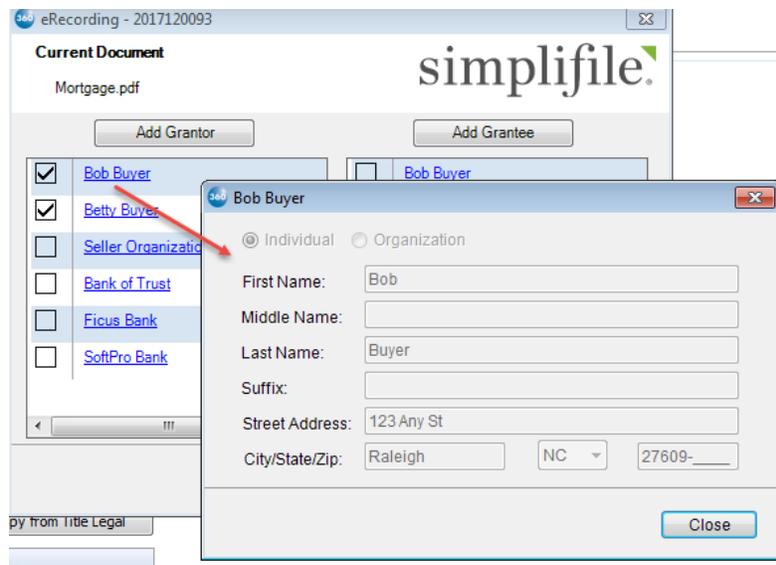
If a Grantor or Grantee is entered in the Order as a Buyer, Seller or Lender, the contact will not be displayed in the grids. Click on the **Add Grantor** or **Add Grantee** buttons opens the **Add Grantor** or **Add Grantee** windows. By default, these windows open with the **Individual** party type selected.



Only a first name or business name is required by SoftPro 360 to add a contact to the grid. Depending on the county, a full name or address may be required to submit a document for recording.

Grantor and Grantee name and address details

Clicking on a contact name opens the contact details window, displaying the first name, middle name, last name and suffix for Individual contacts and the business name for Organization contacts, as well as the contact's current address from the Order.



The data in the details window will be sent to Simplifile if required for recording.

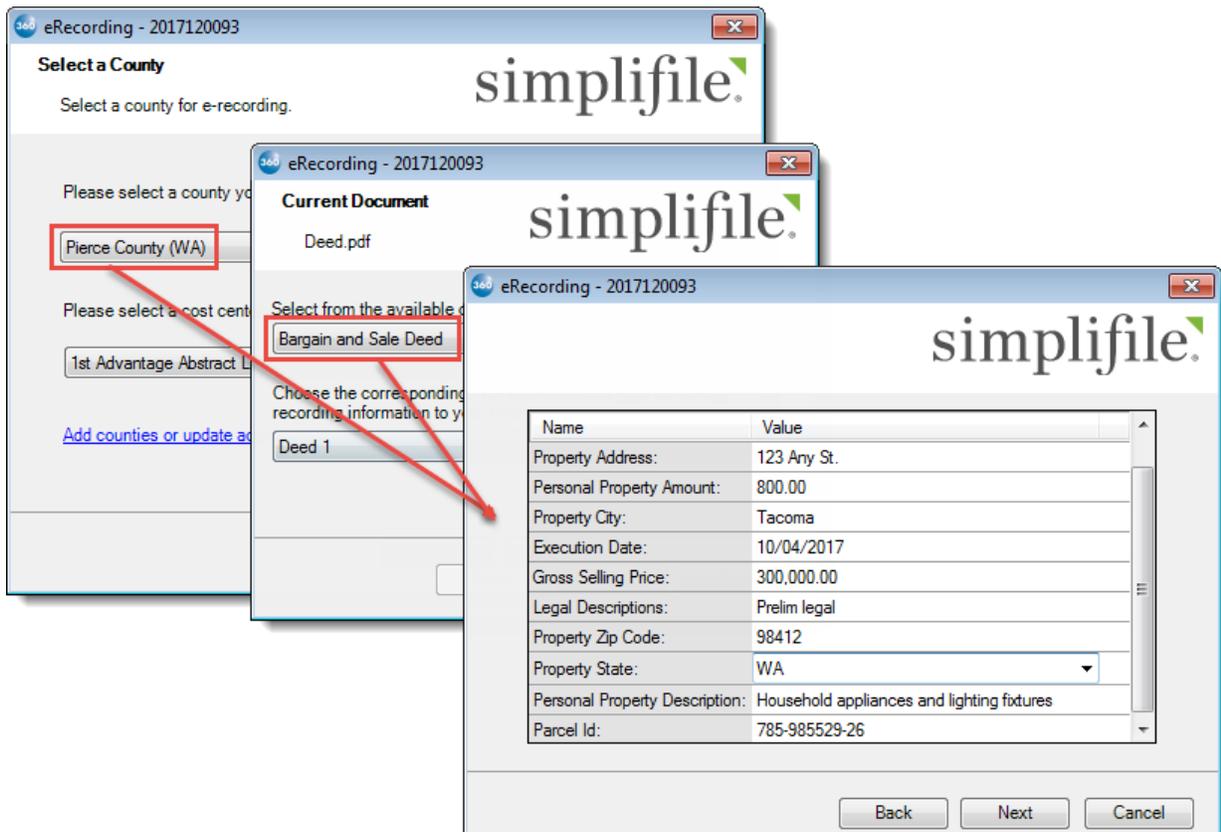
These fields are not editable. If the user wants to add or change a name or address, the user can either (1) return to the Order to edit these fields as necessary, (2) use the **Add Grantor** or **Add Grantee** buttons to add a party to the grid with the added or changed data, or (3) proceed to the next screen and make any changes when reviewing the document on the Simplifile website.

Requested Information

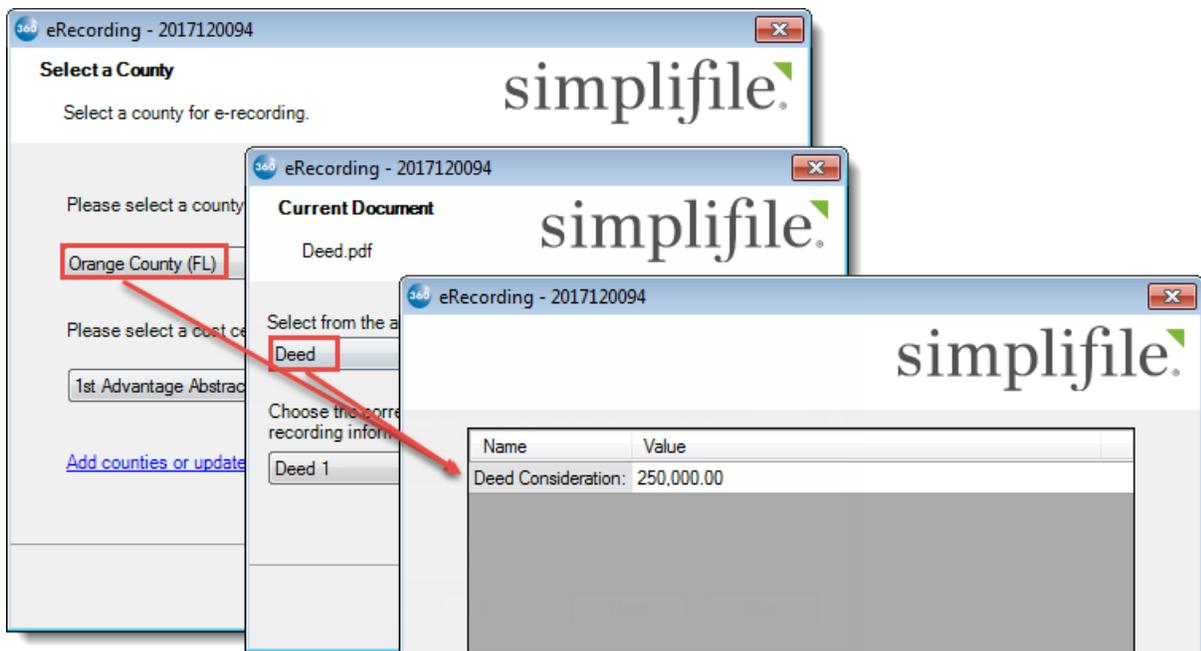
Some counties require additional information to be sent with a document for recording.¹ Based on the selected county and the selected county document type, Simplifile will communicate with SoftPro 360 and SoftPro 360 will display the additional required information in a grid.

¹ A list of the fields supported by SoftPro 360 for Simplifile is in Appendix A.

For example, this grid is displayed for a Bargain and Sale Deed in Pierce County, WA:



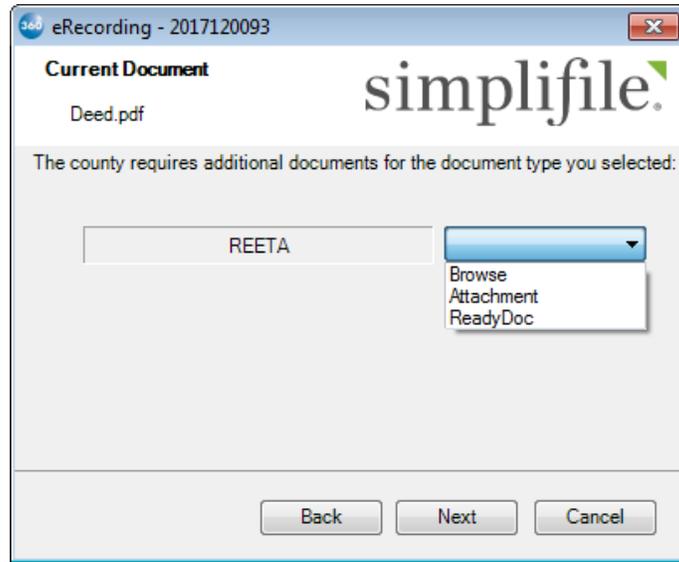
For a Deed in Orange County, FL, this grid is displayed:



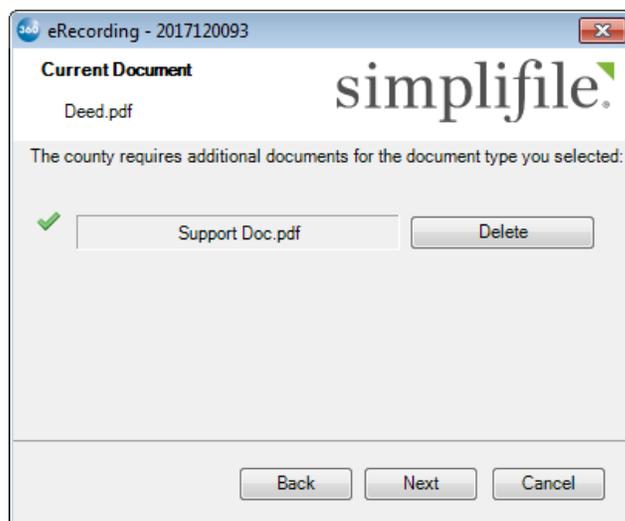
Some counties do not require any additional information to record certain county document types. In that case, no grid will open, and the user will be taken to the next screen in the Simplifile recording wizard.

Adding Helper Documents

If a county requires an additional document to be recorded with the main document, a window will open with the name of the required supporting document. A combo box to the right opens to a list of options for browsing to or attaching the supporting document to the recording package.



When a supporting document has been successfully added, the file name will appear with a green checkmark.



Clicking **Next** will return the user to the **Document Delivery** screen.

Submitting Document Package

After the user has added the documents to the package, selecting **Next** on the **Document Delivery** screen opens the **Ready to Submit** screen. This screen gives the user the option to receive an email notification when the recorded documents are returned to the Order. The user also has a choice to submit the document package to Simplifile for reviewing on its websites *before* it is sent to the county or to send it directly to the county without review.

eRecording - 2017120002

Ready to Submit

The document package is ready for submission.

If you would like to receive email notification when your recorded package is READY, it can be sent to:

lizanne.healey-smith@softprocorp.com

I understand that I am responsible for the information I submit to the county. The county MAY CHARGE A FEE FOR REJECTED SUBMISSIONS. Simplifile strongly suggests you go through the document review process.

Review the document package on Simplifile's website.

Submit this document package to the county recorder without completing the review process.

Back Submit Cancel

Email Notification

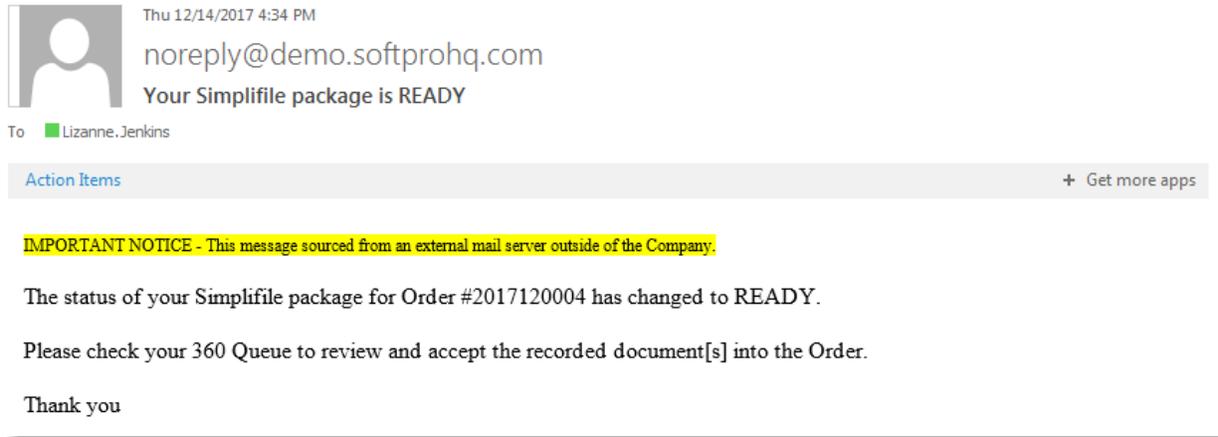
The user has the option to have get an email notification when the recorded package has been returned to the Order and the transaction status in the 360 Queue has changed from **In Progress** to **Ready**. By default, the email address that the user enters to sign into SoftPro 360 is entered for the notice. Also, by default, this option is unchecked. Checking the checkbox, activates the email notification option and allows the user to change the email address for notification.

If you would like to receive email notification when your recorded package is READY, it can be sent to:

sue.jones@softprocorp.com

The changed email address is saved so that it will appear in this field the next time the user opens the Simplifile service in SoftPro 360.

The email will message will be similar to this:

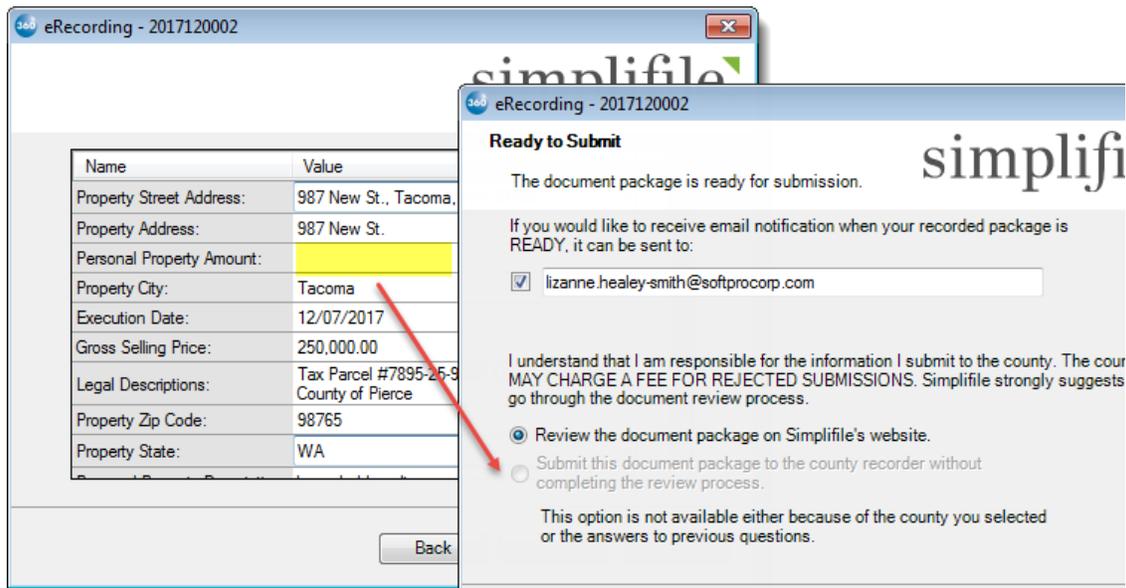


Reviewing Package in Simplifile

By default, the option to review the package on Simplifile’s website before submitting it to the county for recorded is selected. Selecting **Submit** will open the user’s default browser to Simplifile with the package available to be reviewed before submitting for recording.

Sending Package Directly to County

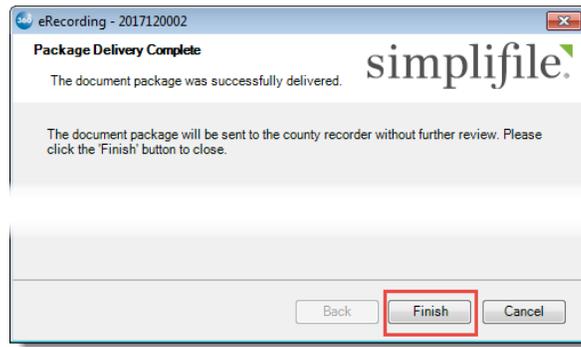
This option is available only when the user has entered data into all the required fields, if any, for all documents in the package. If any field is empty, this option will be disabled.



Please note that this option should be used very carefully. It is intended for advanced users who know the county requirements and whether all those requirements have been met in the recording package,

and no further data would need to be added on the Simplifile website for the package to be “Ready” to Submit.

When a package has been successfully sent without review, a message will let be displayed. The user selects **Finish** to close the service.



Completing Packages in Simplifile

Completing Required Information

Submitting a package with the review option opens the user's default web browser to the Simplifile website with the documents attached and ready for review.

The screenshot shows the 'Package Details' page in Simplifile. At the top right, there is a dropdown menu for 'Organization J'. Below this, there are 'Back' and 'Save' buttons. The 'Package Name' field contains '2017120002', with a callout stating 'Order # is Package Name'. The 'Recipient' is 'Pierce County, WA' with an estimated recording time of '5 minutes - 1 hour'. The 'Package Status' is 'Draft', with a callout explaining that 'Draft status indicates that data is required before package can be submitted.' The 'Package Created Under' field shows '1st Advantage Abstract LLC', with a callout stating 'Cost center selected in SoftPro 360'. Below this is a table of documents:

Name	Type	Pages	Fees	Status	ID	History	Download/Print
Deed.pdf	Bargain and Sale Deed	1	\$74.00	Draft	Thu 12/14/17 3:01 PM EST	ID History	Download Print
Mortgage.pdf	Mortgage	1	\$75.00	Draft	Thu 12/14/17 3:01 PM EST	ID History	Download Print

Below the table is a dropdown menu for '- Choose a Document Type -' and an 'Add Document' button. At the bottom, there are recording and submission fees: 'Recording Fees: \$149.00 from Invoice' and 'Submission Fee: \$10.00 from Invoice'. A callout points to the 'Deed.pdf' file name, stating 'Clicking on the file name opens the review screen.'

If a document has a **Draft** status, the user needs to open the document by clicking on the document's file name. Required data is marked with a red asterisk.

Submitting Package for Recording

Once the required data has been entered the document status will turn to **Ready** and the **Submit** button is displayed.

The screenshot displays the 'Package Details' page. At the top right, there is a dropdown menu for 'Organization J' and a 'Sign Out' link. Below this, there are 'Back' and 'Save' buttons. The 'Package Name' field contains '2017120002'. The 'Recipient' is 'Pierce County, WA' with a note '5 minutes - 1 hour estimated recording time'. The 'Package Created Under' field contains '1st Advantage Abstract LLC'. The 'Package Status' is 'Ready'. A red arrow points from the 'Submit' button in the toolbar to the 'Ready' status. The toolbar includes 'Download', 'Print', 'Discard', and 'Submit' buttons. Below the toolbar is a table with columns: Name, Type, Pages, Fees, Status, Date, ID, History, and Download/Print. The table contains two rows: 'Deed.pdf' (Bargain and Sale Deed, 1 page, \$74.00) and 'Mortgage.pdf' (Mortgage, 1 page, \$75.00). Both documents have a 'Ready' status. Below the table is a dropdown menu for '- Choose a Document Type -' and an 'Add Document' button. At the bottom, there are 'Recording Fees: \$149.00 from Invoice' and 'Submission Fee: \$10.00 from Invoice'.

Name	Type	Pages	Fees	Status	Date	ID	History	Download/Print
Deed.pdf	Bargain and Sale Deed	1	\$74.00	Ready	Thu 12/14/17 3:01 PM EST	ID	History	
Mortgage.pdf	Mortgage	1	\$75.00	Ready	Thu 12/14/17 3:01 PM EST	ID	History	

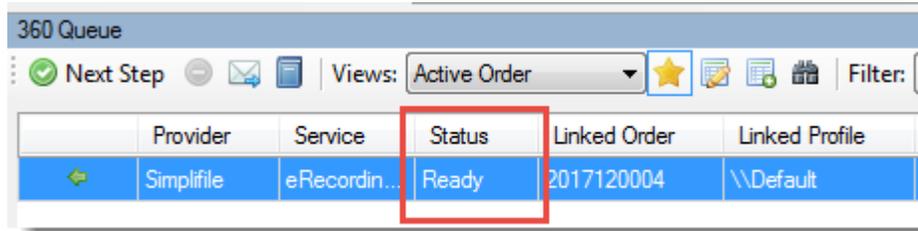
Clicking the **Submit** button sends the package to the county for recording.

Managing Packages after Submission

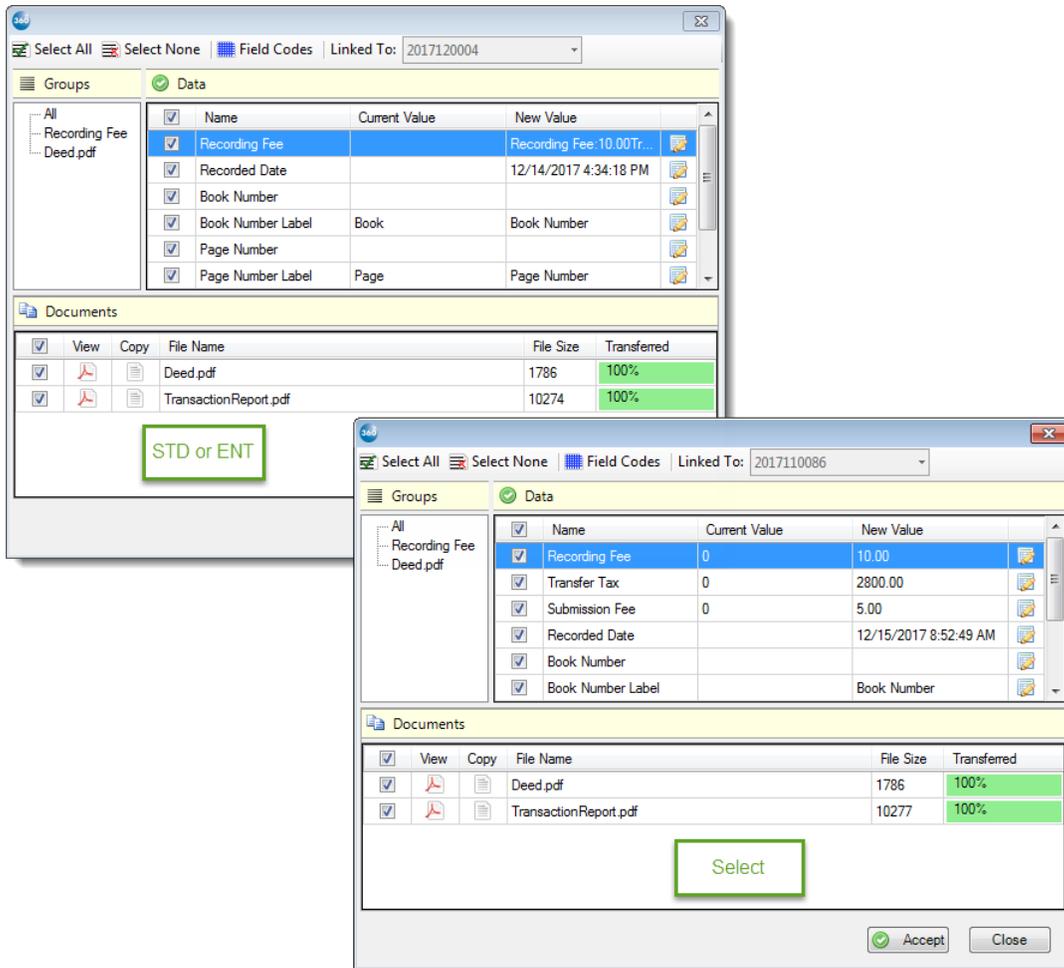
Importing a Recorded Package

Opening a “Ready” Transaction

When a package has been successfully recorded, the transaction status will change to **Ready**.



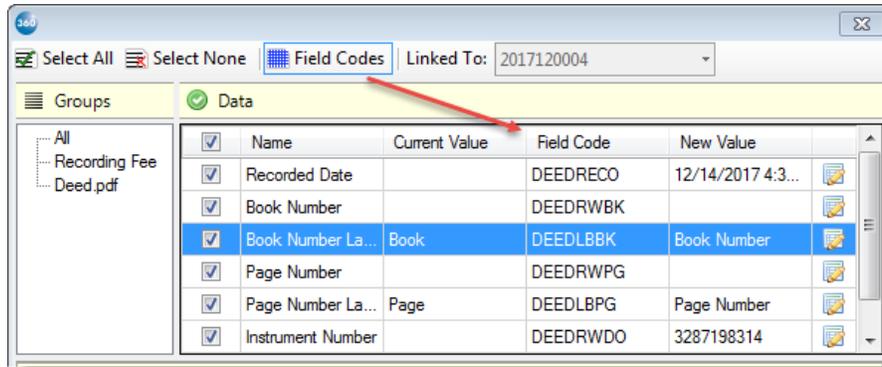
Clicking on the **Next Step** icon or double clicking on the transaction will open the Review screen.



Working in the Review Screen

The **Groups** section of the screen displays the data tree. Selecting on a branch of the tree will display only the data relevant to that branch. The **Data** section of the screen displays a description of each data item, the **Current Value** if one exists in the Order, and the **New Value** sent by Simplifile.

Selecting the **Field Codes** button opens a column in the **Data** section that displays the field codes for the fields into which the **New Values** will be imported.



Recording fees are sent to the Notes section of the Order.

2) File No., Settlement Dates, Notes (2017120004.PFD)

Firm File Number: 2017120004

Transaction Type: Purchase Refinance Equity

Cash Sale: Construction: Reverse Mortgage:

Settlement Date: //

Include Saturday in Rescission Period:

Disbursement Date: // Proration Date: //

Title Examiner: Closer:

Escrower: Escrower Title:

Order Notes: Recording Fee:10.00
Transfer Tax:1750.00
Submission Fee:5.00

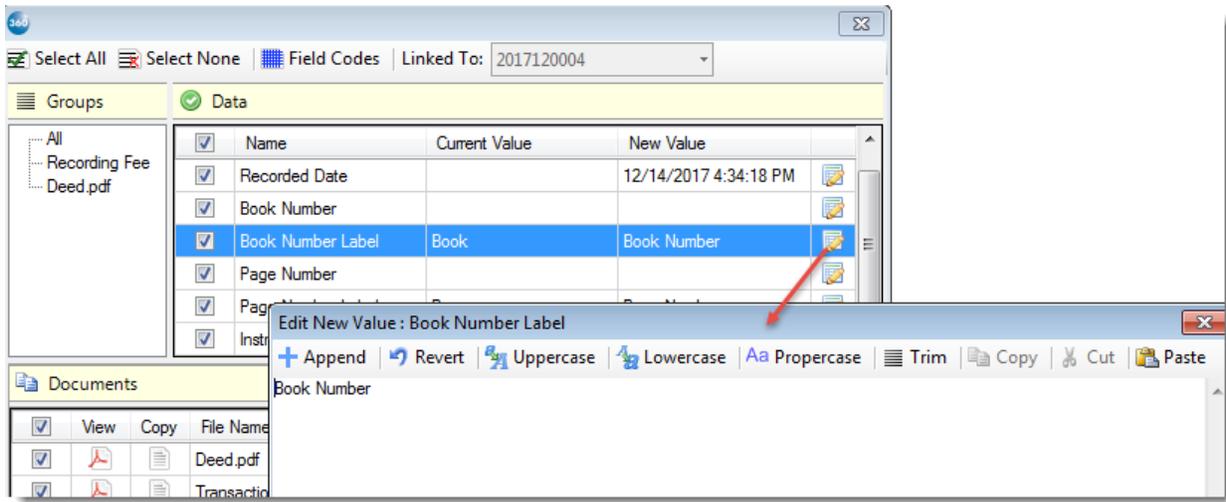
STD or ENT

Notes (1)

Select

Created	Last Modified	Note
12/15/2017 09:07 AM	Lizanne Healey-Smith	Initial Recording Fee: \$10.00 Initial Transfer Tax: \$2800.00 Initial Submission Fee: \$5.00

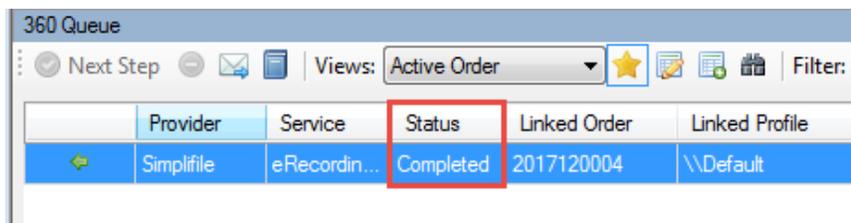
The **Edit** icon to the right of each line allows the user to open the **New Value** and edit it before importing it into the Order.



USER TIP: If you are unsure whether to accept the data or not, you can use the **Edit** feature and select **Append** in the **Edit New Value** screen. This will add the **Current Value** to the **New Value**. As long as the field has sufficient space to hold both the **Current Value** and the **New Value**, after clicking **Accept**, they will both be in the field so that you can decide on which data to keep when you are back in the Order.

The **Documents** section of the Review screen displays the documents that may be attached to the Order's **Attachments** or **SPIImage**. The **View** icon allows the user to open the document prior to importing it into the Order. The **Copy** icon allows the user to copy and paste an image of the document into another document.

By default all documents and data are selected to be imported into the Order. Any item unchecked will not be imported and will not be available for importing after the user clicks **Accept**. After the user has reviewed the data and documents and made any changes, clicking the **Accept** button sends the documents to **Attachments** or **SPIImage** and the data to the appropriate fields in the Order. Once the importing is done, the **Review** screen closes and the transaction status in the 360 Queue changes to **Completed**.

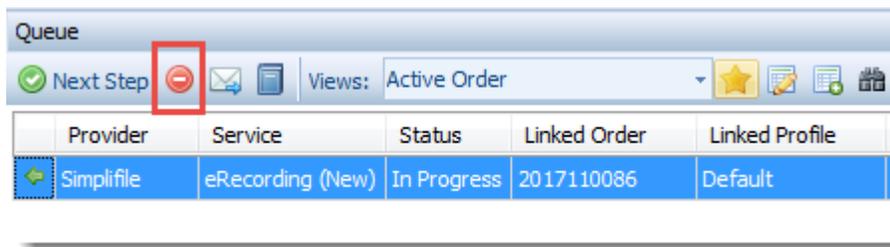


The user can also select the **Close** button to close out of the Review screen without importing the data and documents the order. The transaction status will remain as **Ready** so that the user can open it later to review and import the data and documents.

Canceling a Package Submitted to Simplifile

Once an order has been submitted to Simplifile, it can be canceled in the 360 Queue **only if** the package is in **Draft** status on the Simplifile website and was not sent to the county for recording, or if the transaction has been rejected and has an **Updated** status. A **Ready** transaction cannot be canceled.

To cancel a package, select the Simplifile transaction and the **Void** icon in the 360 Queue toolbar.

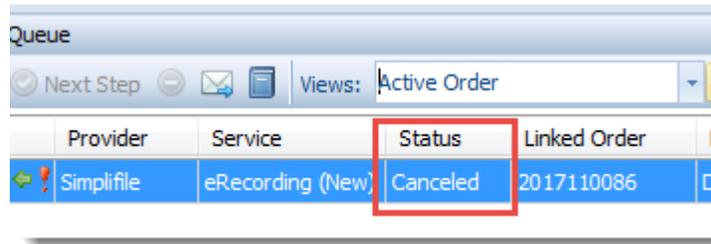


This opens the **Cancel** screen. Checking the **I Agree** checkbox, enables the **Next** button.



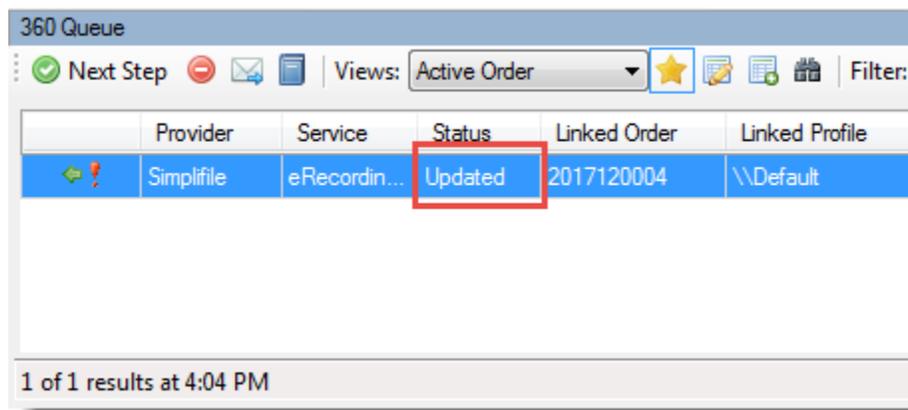
Clicking on the **Next** button sends the cancellation request to Simplifile. When the cancellation submission is complete a window will open to let the user know that the recording package has been canceled. The user can select the **Finish** button to close the service.

In the 360 Queue, the transaction will have a **Canceled** status and cannot be opened again.

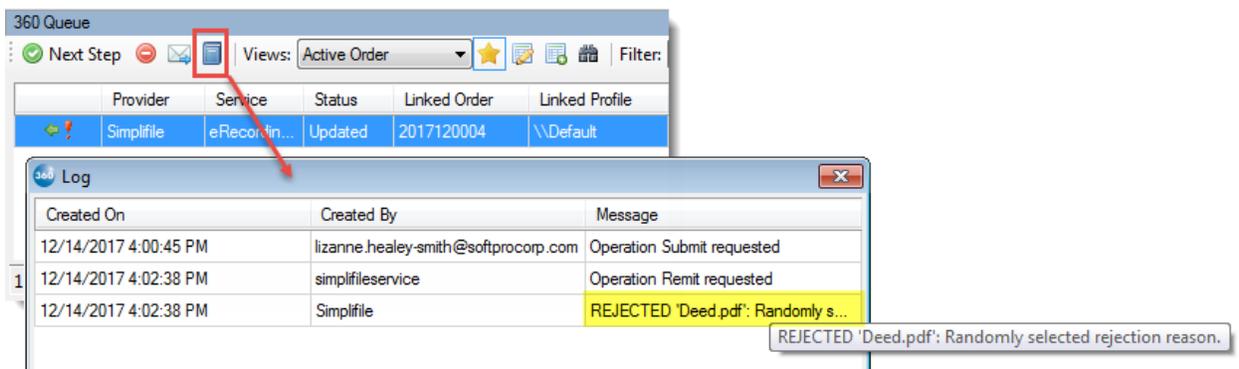


Handling Rejected Packages

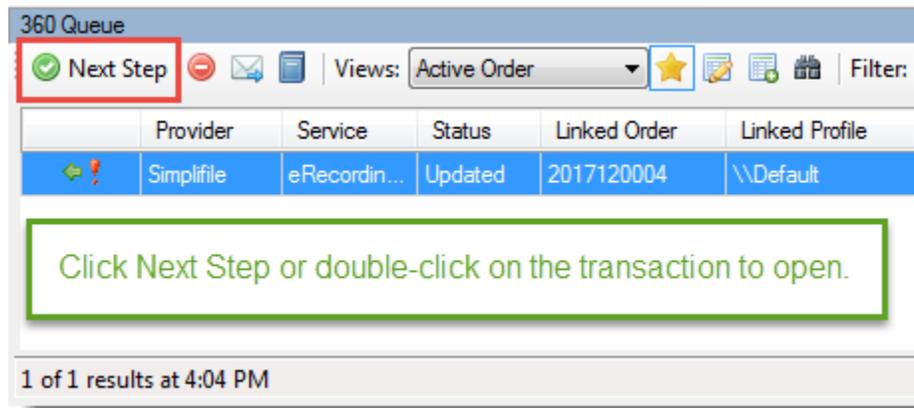
If a package has been rejected by the county, Simplifile will send a notification to SoftPro 360. In the 360 Queue the transaction status will be **Updated**.



The file name of the document rejected and the reason for rejection will be in the transaction log. Clicking on the Transaction Log icon opens the transaction log. Hovering over the message will display the full rejection explanation.



Clicking on the **Next Step** icon or double-clicking on the transaction in the 360 Queue will open the Simplifile service.



If there was an issue with the document, the user can **Delete** the document from the **Document Delivery** screen and attach the corrected document. If there was an issue with indexing, the user can keep the attached document and click the **Modify** button to open information screens and review the corrections to besent with the document package.

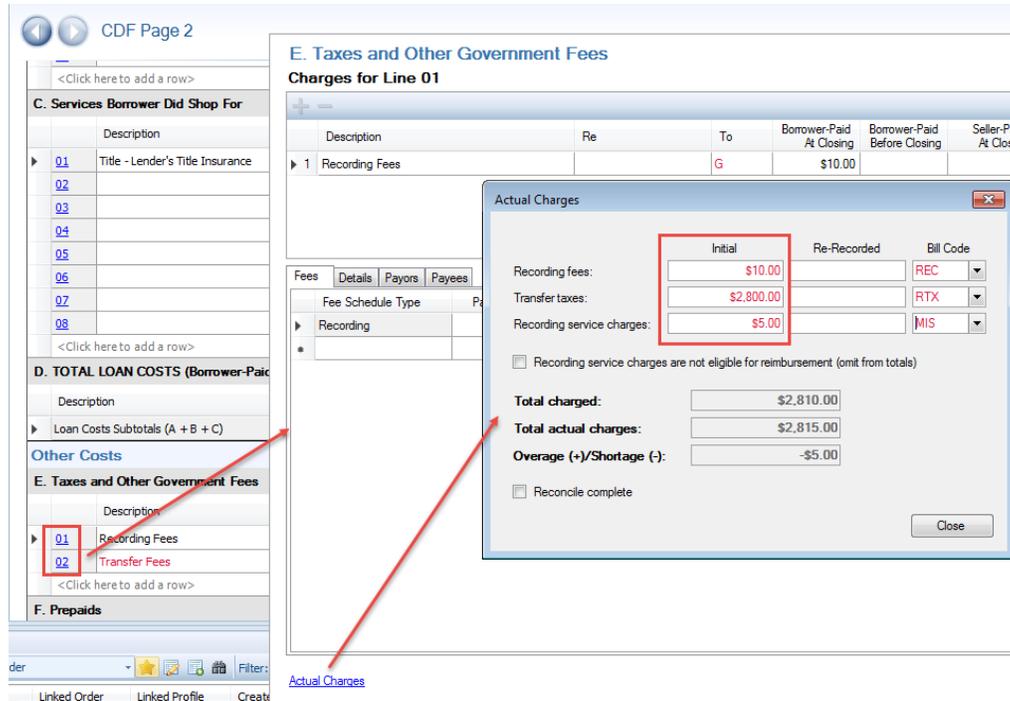
Once in the Simplifile website, the user can open the document to address any required data issues and submit the package again for recording. The transaction status in the 360 Queue will return to **In Progress**.



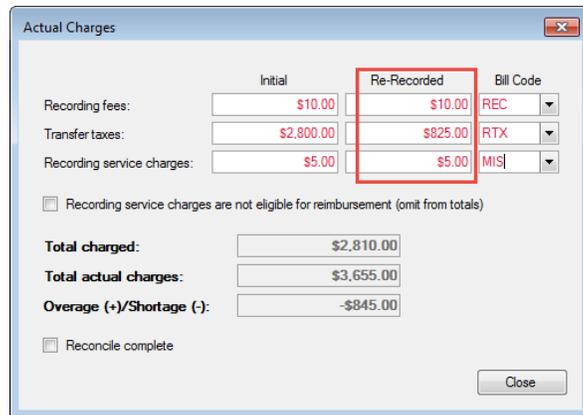
Additional Features for Select Users

CDF Page 2: Actual Charges

For all ProForm users, recording charges and fees are sent to the **Order Notes** when imported with the recorded documents and data (see *Working in the Review Screen*, above). For Select users (version 4.2.2 and higher) these fees and charges are also sent to the **Actual Charges** dialog in CDF Section E and HUD Section 1200.



The fees and charges for the first recorded package in the Order are sent to the **Initial** column. The fees and charges for additional recorded packages are sent to the **Re-Recorded** column.



If more than one additional package has been recorded, the **Re-Recorded** column will display the cumulative total of the additional fees and charges.

	Initial	Re-Recorded	Bill Code
Recording fees:	\$10.00	\$20.00	REC
Transfer taxes:	\$2,800.00	\$825.00	RTX
Recording service charges:	\$5.00	\$10.00	MIS
<input type="checkbox"/> Recording service charges are not eligible for reimbursement (omit from totals)			
Total charged:	\$3,655.00		
Total actual charges:	\$3,670.00		
Overage (+)/Shortage (-):	-\$15.00		
<input type="checkbox"/> Reconcile complete			

The cumulative total for the fees and charges for subsequent recorded packages will also be sent to the **Order Notes** for each recorded package.

Notes (3)

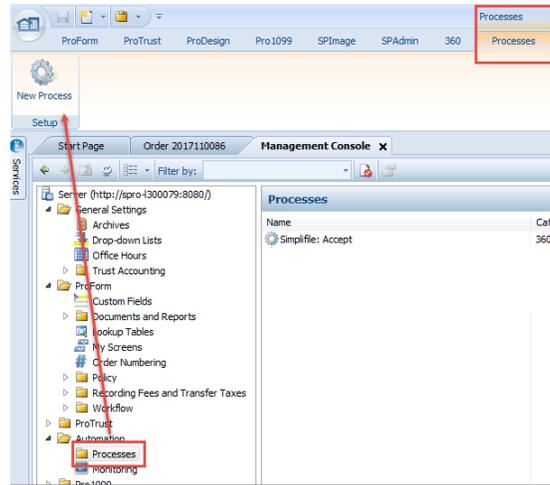
	Created	Last Modified	Note
▶	12/15/2017 10:36 AM	Lizanne Healey-Smith	Re-Recorded Recording Fee: \$20.00 Re-Recorded Transfer Tax: \$825.00 Re-Recorded Submission Fee: \$10.00
	12/15/2017 10:00 AM	Lizanne Healey-Smith	Re-Recorded Recording Fee: \$10.00 Re-Recorded Transfer Tax: \$825.00 Re-Recorded Submission Fee: \$5.00
	12/15/2017 09:07 AM	Lizanne Healey-Smith	Initial Recording Fee: \$10.00 Initial Transfer Tax: \$2800.00 Initial Submission Fee: \$5.00

These notes reflect the fees for the third recording package (the second Re-Recorded package to be a Recording fee of \$10, Transfer Tax of \$0 and a Submission Fee of \$5).

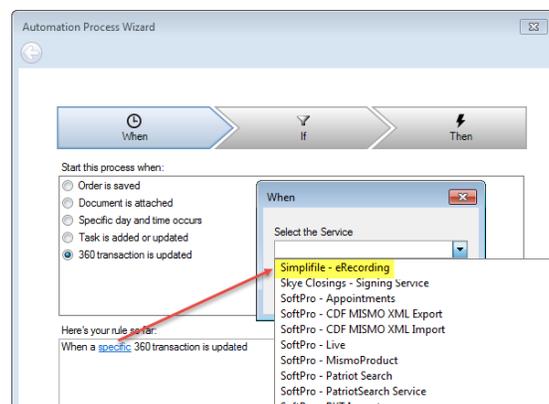
For more information on **Actual Charges**, click use **F1 Help** when in the **Actual Charges** dialog.

Automation

Workflow Automation is available to Select users on Select version 4.3.2 (4.2.41028.5) or higher. Automation for Simplifile transactions can be enabled to submit a new recording package and handle packages returned to 360. Only users with **SPAdmin** access can create an automation process. Automation processes are created by **SPAdmin** by clicking on the **Processes** subfolder under **Automation** and clicking on **New Process Setup** in the **Processes** ribbon, or right clicking on the **Processes** subfolder and clicking on **New Processes**.²

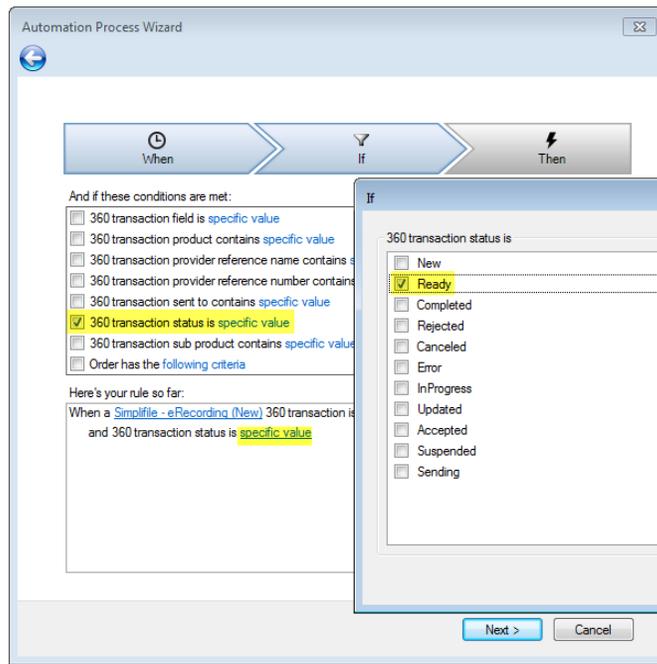


There are multiple automation processes that can be set up for Simplifile. One example is to set up a process to accept recorded packages. In the **Automation Process Wizard**, for **When**, select (1) **360 transaction is updated** and (2) the specific link to select **Simplifile – eRecording**.

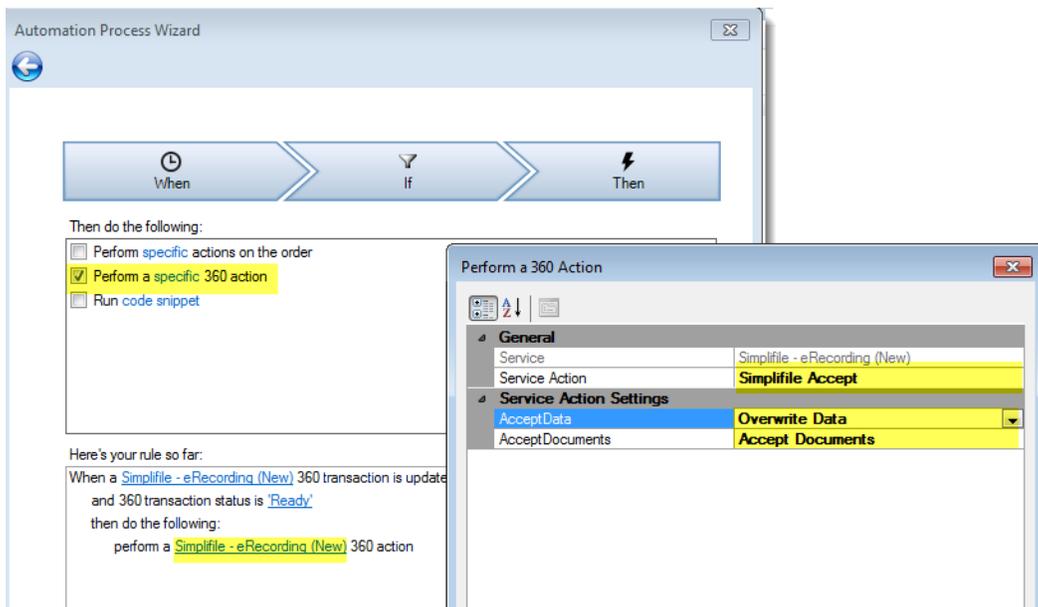


² A full explanation of the **Automation** process is beyond the scope of this User Guide. For more information, access the **Processes** subfolder in the **Management Console** of **SPAdmin**, and click the **F1** key to open the online **F1 Help** guide for **Select Automation**.

For **If**, check **360 transaction status is** and a **specific value** of **Ready**.



For **Then**, check **Perform a specific 360 action** and a Service Action of **Simplifile Accept**, Accept Data of **Overwrite Data**, and Accept Documents as **Accept Documents**.



Click **Finish** on the **Automation Process Wizard** and enter a **Name** for the process in the next screen. Checking the **Enable this process** checkbox will enable the process for In Progress and new recording transactions.