User Guide

Customizable Web Order Entry

October 2019

Version 5.0

History

Date	Document Version	Details
08/2018	1.0	Initial User Guide for 3.0 Release
02/2019	2.0	New fields for 3.1 Release - Transaction Information Section - Property Information Section - Contacts Section (new field for Lenders)
04/2019	3.0	New fields for 3.2 & 3.2.1 Releases - New Municipal Searches Section - Mortgagee Clause is now Proposed Insured Clause - New ability to customize dropdown values for Order Type and Property Type on the Custom Form Editor for Admins
09/2019	4.0	New Product Type field in 3.5 Release
10/2019	5.0	New feature in 3.6 Release - Virus Scanning for Document Uploads with Security Risks

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Overview

SoftPro Live Web Order Entry gives providers of SPLive the ability to retrieve their customer's order requests and seamlessly accept the order data into ProForm. Providers of SPLive needed the ability to streamline the process of end users placing orders on the web, especially for those submitting basic information.

Customizable Web Order Entry Benefits
• Ability for administrators to control what is displayed on the web order entry form for sections, fields and dropdown values
• New fields on the WOE form
• Contacts section with ability to add all contact types supported in SoftPro
• Grid views of parties and contacts being submitted with the order
• Ability for providers to filter submitted web orders by profile in the 360 queue when multiple profiles exist
• Ability for providers to receive email notifications by profile when multiple profiles exist
• Additional roles added in Account Settings
• Ability Cancel Button on Web Order Entry Form

Glossary

Role/Term	Description
SPLive End User	Registered SPLive user with access to Web Order Entry. Typically third party entities such as Lenders or Selling Agents
WOE Form	Web Order Entry Form – used by end users to place orders from the SPLive website
SPLive Administrator	Registered SPLive user with administrative privileges who setup customer profiles. These are typically administrators for the Provider

Custom Form Editor	Form used by Administrators to modify the layout of the WOE Form
SPLive Provider	Entity providing SPLive service – this is typically a Title and Escrow Company who consume SoftPro to conduct business with end users
SPS	SoftPro Select
Office	Also described as “Branch” or “Profile”. A Provider can have several offices and will setup a separate profile in Administration for each office.

Account Settings

The logged in user has the ability to update their account information by opening Account Settings located under their email address (see figure 1.4 below).

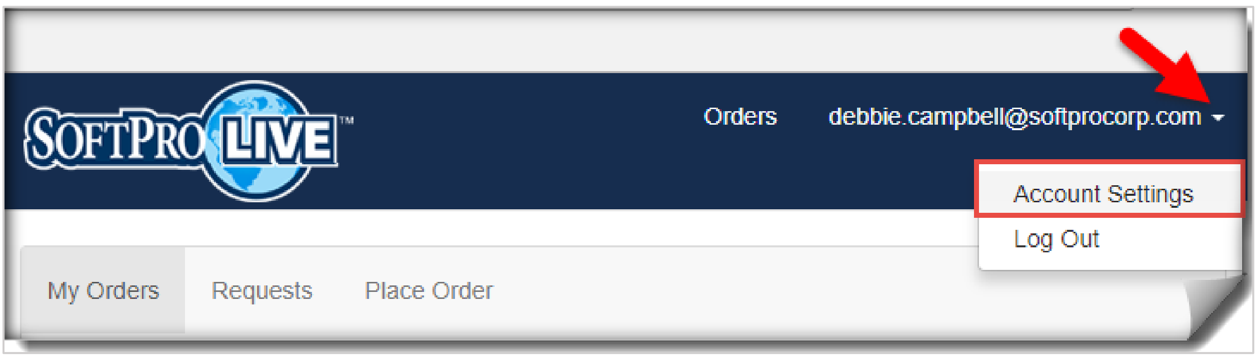


Figure 1.4: Account Settings

Roles

Previously, the logged in user had the following roles available: Lender, Mortgage Broker and Realtor. In this release, they now have the ability to choose: Abstractor, Attorney Representing Buyer, Attorney Representing Seller, Attorney Representing Lender, Escrow Company, Mortgage Broker, Lender, Listing Agent, Selling Agent, Settlement Agent, Title Company, or Other – see figure 1.5.

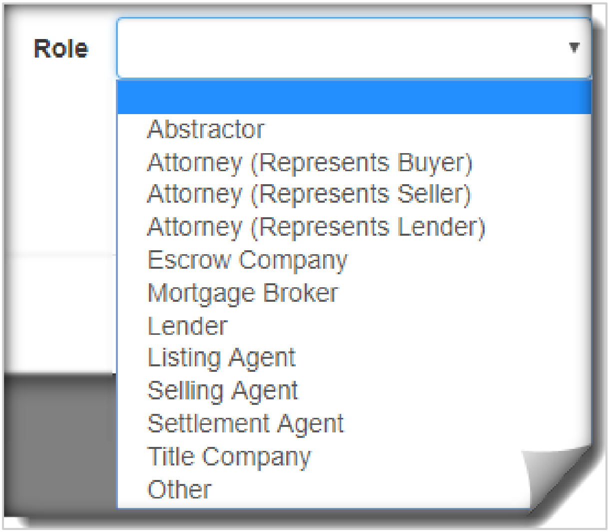


Figure 1.5: Roles

Web Order Entry Form *(Updated)*

SPLive users with rights to WOE have immediate access to the updated WOE form. Each section and field is outlined in this document. If sections or fields described below are not displayed on the WOE form then the Administrator has configured the form to hide certain sections and fields (see Administrators section). Unless otherwise noted in this document, the administrator can make fields required or choose to hide the field.

How to Place an Order

How to place an order in this release is the same as previous releases. Once the Administrator has provided the end user with login information and WOE rights they should be able to view the WOE form with the following steps:

1. Log into SPLive using credentials provided by your Administrator.
2. Click 'Place Order'.
3. Web Order Entry Form is displayed to enter order information – see figure 1.1.
    a. Contacts section
    b. Payoffs section
4. Click Cancel or Submit Order – see figures 1.2 & 1.3
    a. After clicking Submit an order submission confirmation message appears, click Continue
    b. Cancel button will cancel the order and revert back to My Orders page (previously the user had a 'Reset' button which cleared entered text on the form).
5. SoftPro Live 'Requests' page is displayed after submitted an order – see figure 1.4.
    a. NOTE: This page shows a list of submitted orders from the logged in user to the Provider only. To see the list of orders accepted/published from the Provider to SPLive then go to 'My Orders' page tab.

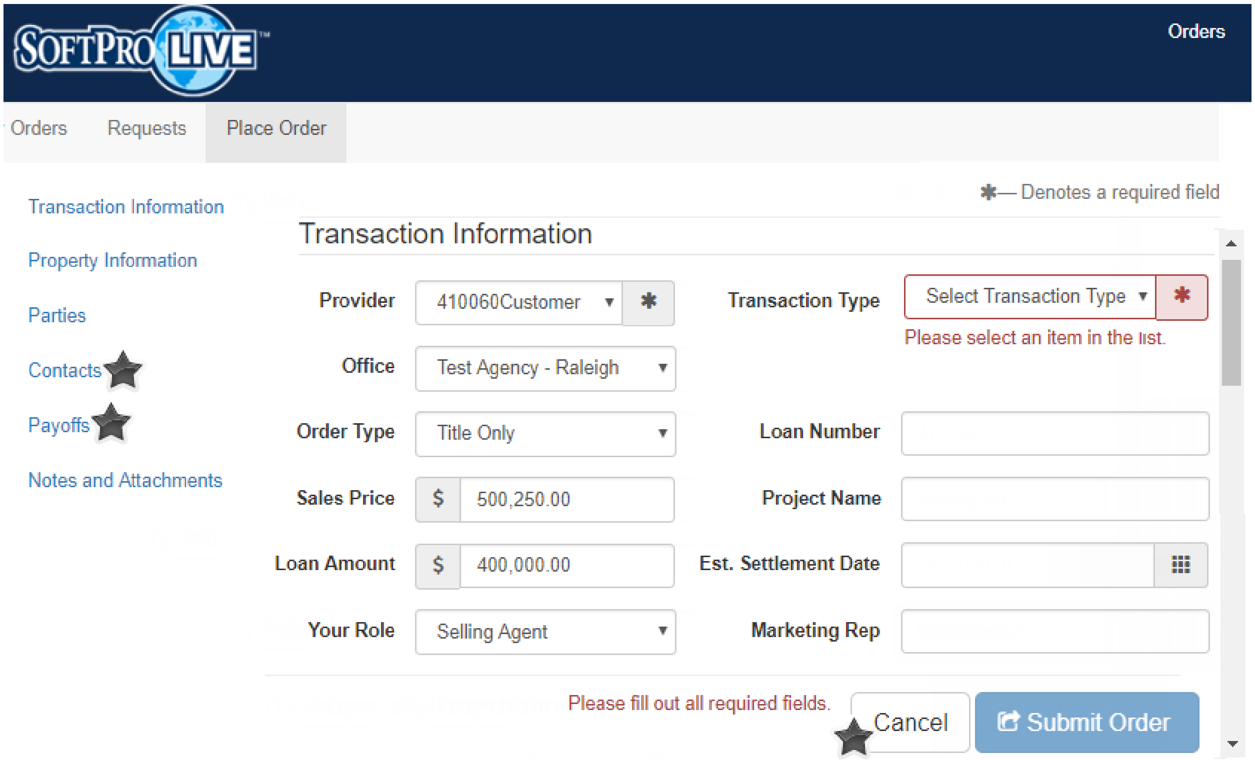


Figure 1.1 - WOE Form

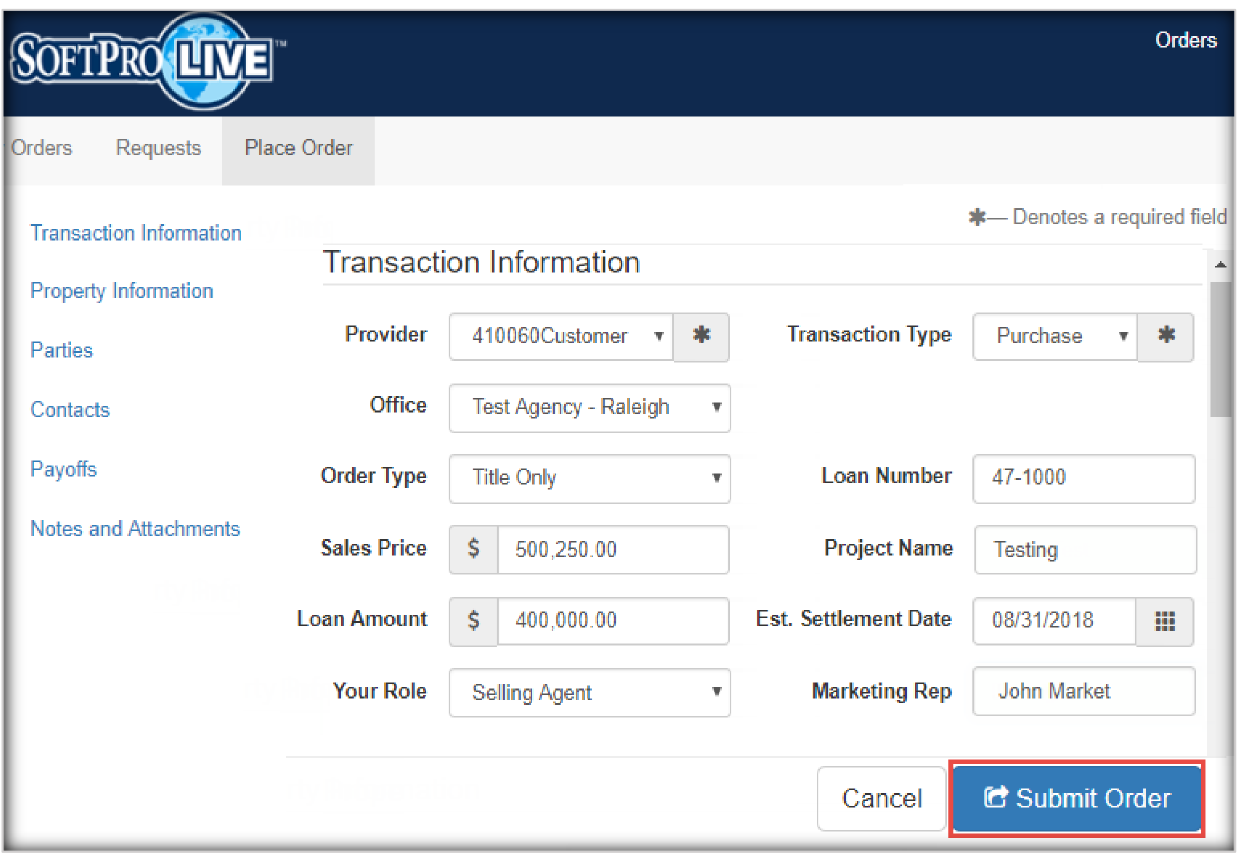


Figure 1.2 – Submit Order

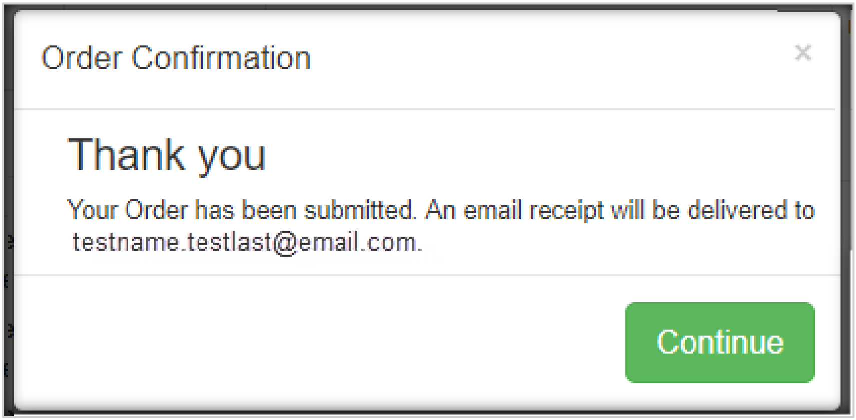


Figure 1.3 – Order Confirmation

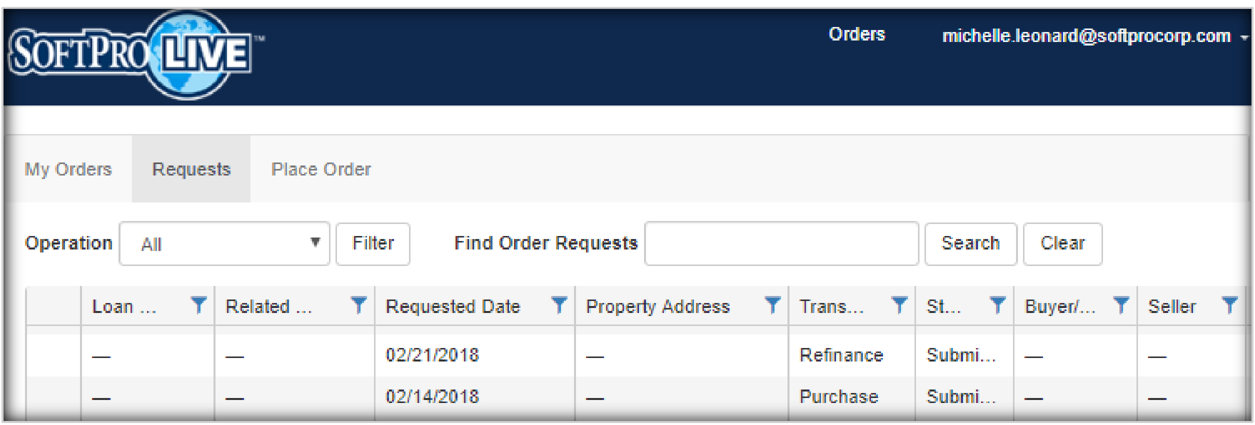


Figure 1.4 – Requests Page

Section Details

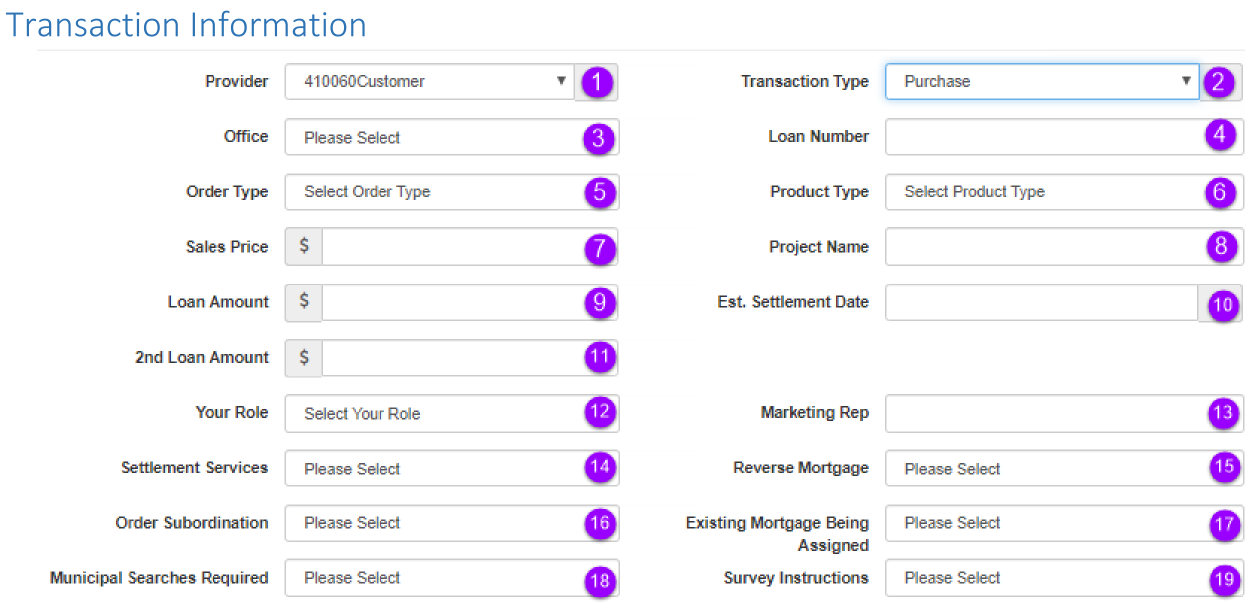


Figure 2.0 - Transaction Information Section

Transaction Information Section		
Ref#	Field	Description
1	Provider	Dropdown values pull from the customer association(s) with the login user's account in Administration (single customer is selected by default). If multiple customer associations exist then each provider is displayed in the dropdown. The administrator can make this field hidden but cannot make it optional as it is system required field. Provider Selection dialog: If multiple customer associations exists then this dialog will appear as soon as the user clicks "Place Order" see figure 2.1 above.
2	Transaction Type	Dropdown values pull from the custom form editor. The administrator cannot make this field or optional as it is a system required field. However, the administrator can modify what transaction types are displayed in the dropdown.
3	Office	Dropdown values pull from the office name field entered on the customer profile in Administration. If a customer has more than one profile association then the office name for each profile is displayed in the dropdown.
4	Loan Number	Enter a loan number.
5	Order Type	Dropdown values pull from the custom form editor. The administrator can modify what types are displayed in the dropdown and make this field hidden or required.
6	Product Type	Dropdown values pull from the custom form editor. The administrator can modify what types are displayed in the dropdown and make this field hidden or required.

Transaction Information Section		
7	Sales Price	Enter a sales price. Note: Sales Price field will disable when the transaction type is Refinance or equity.
8	Project Name	Enter a project name.
9	Loan Amount	Enter a loan amount.
10	Est. Sett Date	Enter an estimated settlement date. The administrator can make this required or field hidden.
11	2nd Loan Amount	Enter a 2nd loan amount. NOTE: This field is hidden by default, so the Administrator will have to make it shown on the custom form editor and re-publish. The administrator can also make field required.
12	Your Role	Pulls from login user's Account Settings once a Transaction Type is selected. The administrator can make this required or field hidden and also modify what types of roles are displayed in the dropdown. Once selected the role type is defaulted into the contacts but users can manually update Your Role to a different contact . NOTE: If Admin chooses to hide Role the role type is not defaulted into contacts but the email address of the submitter is preserved in the order notes once accepted into ProForm.
13	Marketing Rep	Enter the name of the Marketing Representative. The administrator can make this required or field hidden. Note: This field was previously labeled Sales Representative.
14	Settlement Services	Dropdown values pull from the custom form editor. The administrator can modify values displayed in the dropdown. NOTE: This field is hidden by default, so the Administrator will have to make it shown on the custom form editor and re-publish. The administrator can also make field required.
15	Reverse Mortgage	Dropdown values pull from the custom form editor. The administrator can modify values displayed in the dropdown. NOTE: This field is hidden by default, so the Administrator will have to make it shown on the custom form editor and re-publish. The administrator can also make field required.
16	Order Subordination	Dropdown values pull from the custom form editor. The administrator can modify values displayed in the dropdown. NOTE: This field is hidden by default, so the Administrator will have to make it shown on the custom form editor and re-publish. The administrator can also make field required.
17	Existing Mortgage Being Assigned	Dropdown values pull from the custom form editor. The administrator can modify values displayed in the dropdown. NOTE: This field is hidden by default, so the Administrator will have to make it shown on the custom form editor and re-publish. The administrator can also make field required.
18	Municipal Searches Required	Dropdown values pull from the custom form editor. The administrator can modify values displayed in the dropdown. NOTE: This field is hidden by default, so the Administrator will have to make it shown on the custom form editor and re-publish. The administrator can also make field required.
19	Survey Instructions	Dropdown values pull from the custom form editor. The administrator can modify values displayed in the dropdown. NOTE: This field is hidden by default, so the Administrator will have to make it shown on the custom form editor and re-publish. The administrator can also make field required.

Property Information

Figure 3.0 - Property Information Section

Property Information Section		
Ref#	Field	Description
1	Property Type	Dropdown values pull from the custom form editor. The administrator can make this field hidden or required and also modify what types are displayed in the dropdown.
2	Address	Enter an address.
3	Zip Code	Enter a zip code.
4	City	Enter a city or value will default once zip code is entered.
5	State	Enter a state or value will default once zip code is entered.
6	County	Enter a county or value will default once zip code is entered.
7	Lot	Enter a lot or unit number of the property.
8	Block	Enter the block that identifies the property.
9	Section	Enter the section that identifies the property.
10	District	Enter the district where the property is located.
11	APN/PID	Enter an assessor parcel number or parcel ID. NOTE: Previously label was "PIN/APN" and was combined with Tax Map ID
12	Tax Map ID	Enter a tax map ID. NOTE: Previously Tax Map ID was combined with PIN/APN
13	Tract	Enter a tract.
14	Subdivision	Enter a subdivision name.
15	Brief Legal	Enter a brief legal description.

Municipal Searches

Municipal Searches is displayed on the Web Order Entry form once Administrators have shown this new section and fields from the custom form editor and publishes to end users. NOTE: Fields are specific to New York Documents and require NY packages to be installed for these fields to be mapped correctly. Otherwise, fields will be written to order notes.

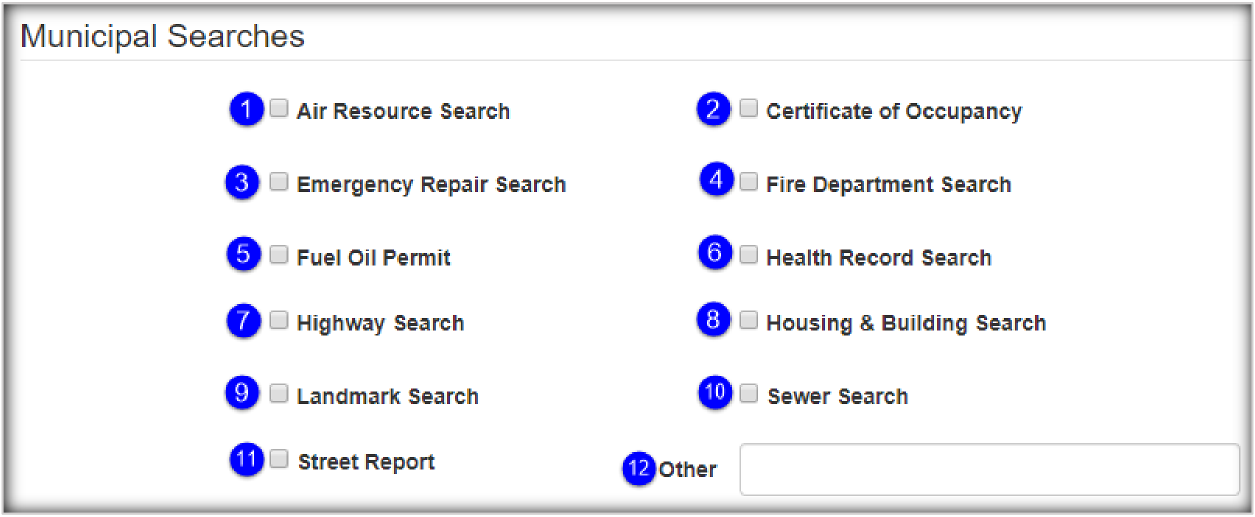


Figure 3.0 – Municipal Searches Section

Municipal Searches Section		
Ref#	Field	Description
1	Air Resource Search	Check the checkbox to select Air Resource Search
2	Certificate of Occupancy	Check the checkbox to select Certificate of Occupancy
3	Emergency Repair Search	Check the checkbox to select Emergency Repair Search
4	Fire Department Search	Check the checkbox to select Fire Department Search
5	Fuel Oil Permit	Check the checkbox to select Fuel Oil Permit
6	Health Record Search	Check the checkbox to select Health Record Search
7	Highway Search	Check the checkbox to select Highway Search
8	Housing & Building Search	Check the checkbox to select Housing & Building Search
9	Landmark Search	Check the checkbox to select Landmark Search
10	Sewer Search	Check the checkbox to select Sewer Search
11	Street Report	Check the checkbox to select Street Report
12	Other	Enter a value for an Other search type

Parties

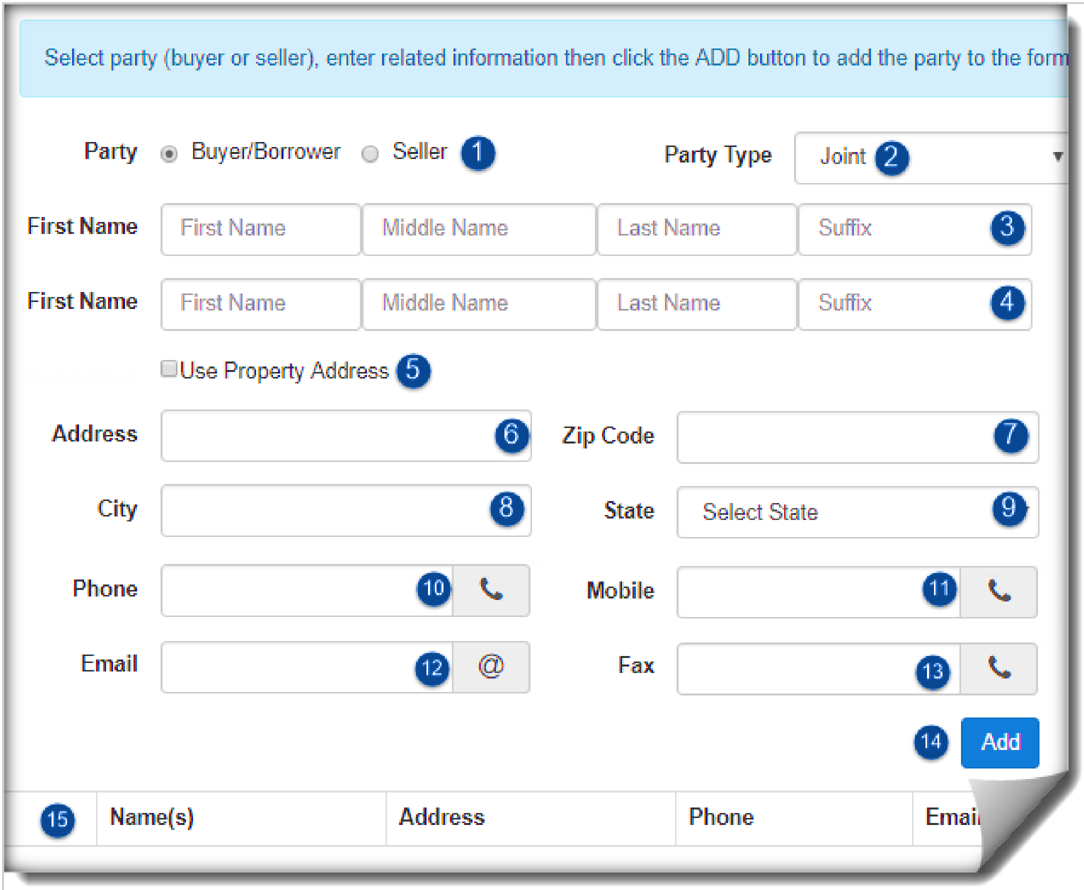


Figure 4.0 - Parties Section

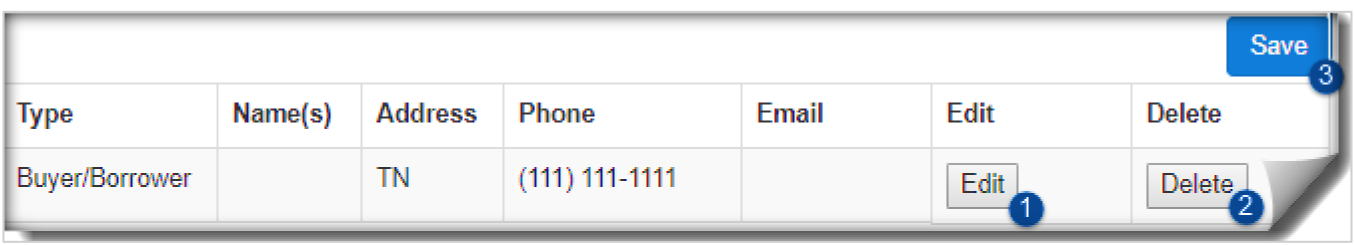


Figure 4.1 - Parties Grid

Parties Section		
Ref#	Field	Description
1	Party	Select the buyer/borrower or seller radio button.
2	Party Type	Dropdown values pull from the custom form editor. The administrator can make this field hidden or required and also modify what types are displayed in the dropdown.
3	First Individual	Enter the first, middle, last names and suffix for 1st Individual. NOTE: these fields are not displayed if the party type is Organization.
4	Second Individual	Enter the first, middle, last names and suffix for 2nd Individual. NOTE: these fields are not displayed if the party type is Individual or Organization.
5	Use Property Address	Select checkbox to pull the property address into the party address, city, state and zip code fields. The administrator can make this field hidden but cannot make it required as the system forces it to be optional.
6	Address	Enter the address for the party.
7	Zip Code	Enter the zip code for the party.
8	City	Enter a city or value will default once zip code is entered.
9	State	Enter a state or value will default once zip code is entered.
10	Phone	Enter a valid phone number.
11	Mobile	Enter a valid mobile phone number. Note : this field will disable if party type is Organization
12	Email	Enter a valid email address.
13	Fax	Enter a fax number.
14	Add Button	Click the add button to add the party to the parties grid. Note: Add button will disable if any of the party fields are required and empty or if fields contain invalid data (e.g. invalid phone number).
15	Parties Grid	Parties being submitted with order. 1. Edit - Click [Edit] button to make changes to the party. 2. Delete - Click [Delete] button to delete the party from the parties grid. Note: the delete button will not be enabled if a user is actively editing a party. 3. Save – Click [Save] to commit changes for edited values.

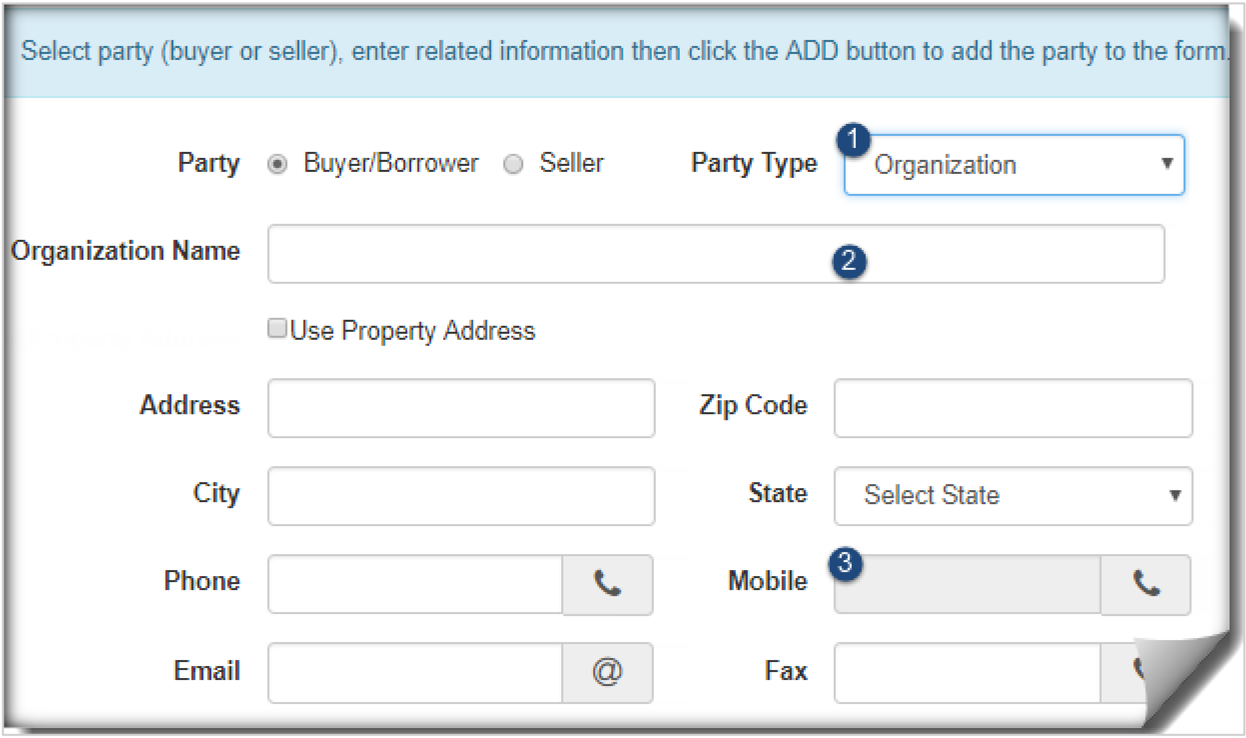


Figure 4.2 – Organization Party

Organization Parties Section		
Ref#	Field	Description
1	Party Type	When dropdown value is Organization then Individual & Joint party names related fields are removed.
2	Organization Name	Enter the name of the organization. NOTE: this field is not displayed if the party type is Joint or Individual.
3	Mobile	Mobile is disabled when party type is Organization.

Contacts

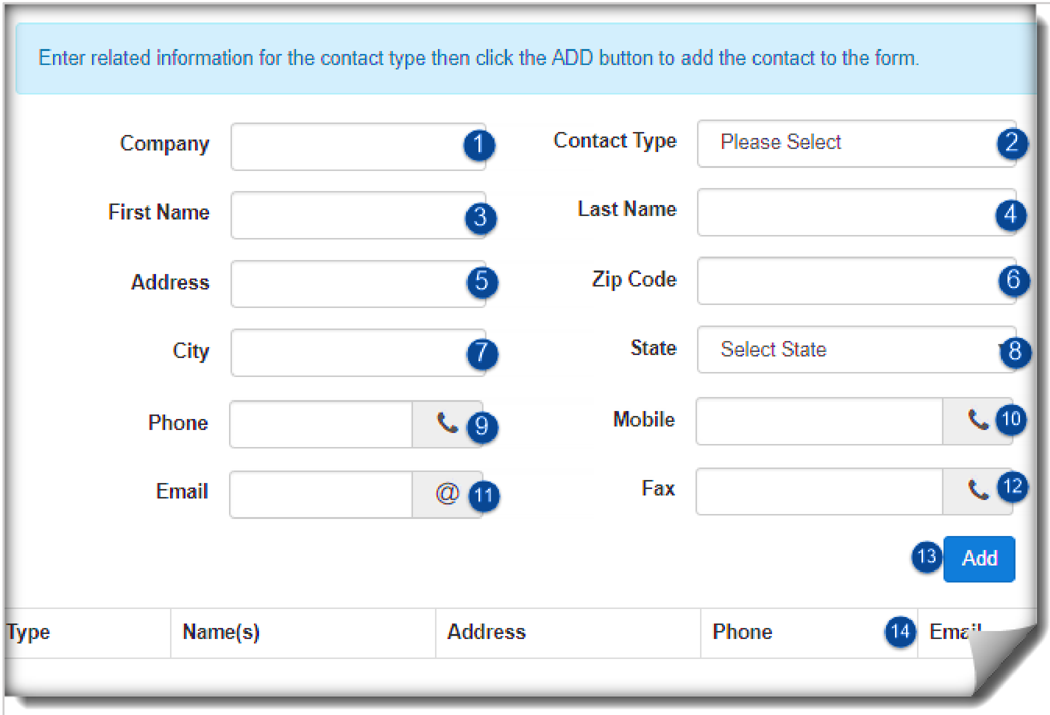


Figure 5.0 - Contacts Section

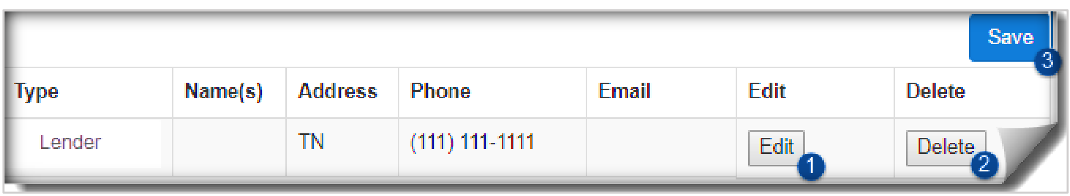


Figure 5.1 - Contacts Grid

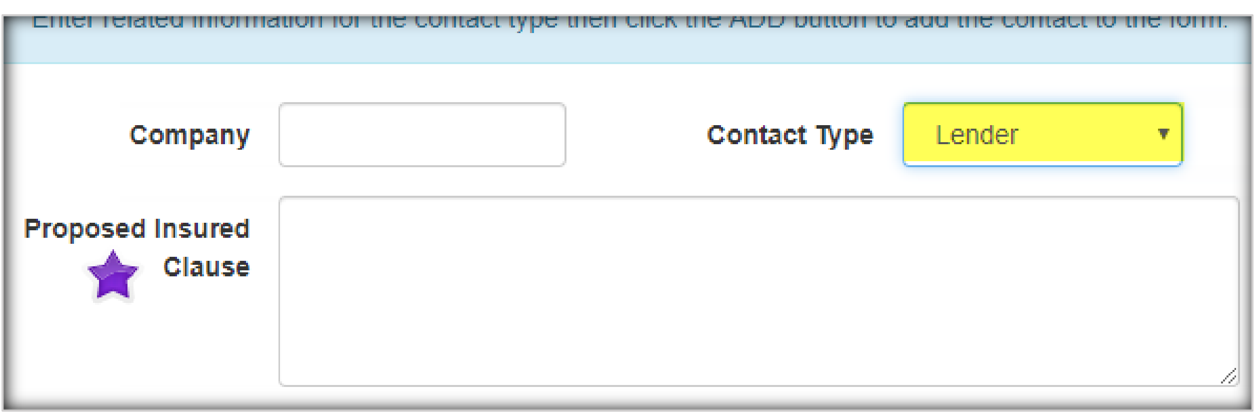


Figure 5.2 – Lender Proposed Insured Clause (previously Mortgagee Clause)

Contacts Section		
Ref#	Field	Description
1	Company	Enter the company name.
2	Contact Type	Dropdown values pull from the custom form editor. The administrator can make this field hidden or required and can limit which types are displayed in the dropdown. NOTE: In this release all contact types available in SPS are now available in this dropdown by default.
3	First Name	Enter the first name for contact.
4	Last Name	Enter the last name for contact.
5	Address	Enter the address for contact.
6	Zip Code	Enter the zip code for contact.
7	City	Enter a city or value will default once zip code is entered.
8	State	Enter a state or value will default once zip code is entered.
9	Phone	Enter a valid phone number.
10	Mobile	Enter a valid mobile phone number.
11	Email	Enter a valid email address.
12	Fax	Enter a fax number.
13	Add button	Click to add the contact to the contacts grid. Note: Add button will disable if any of the contact fields are required and empty or if fields contain invalid data (e.g. invalid phone number).
14	Contacts Grid (Figure 5.1)	View of contacts being submitted with order. Note: a contact will default into the first row of grid when a value in 'Your Role' is selected in Transaction Information section. 1. Edit - Click [Edit] to make changes to the contact information. 2. Delete - Click [Delete] to delete the party from the parties grid. Note: the delete button will not be enabled if a user is actively editing a party. 3. Save – Click [Save] to commit changes for edited values.
15	Lender Proposed Insured Clause	(Lender Contact Type Only) Enter the Proposed Insured Clause to indicate how the Lender name should appear on legal documents. NOTE: This field is hidden by default, so the Administrator will have to make it shown on the custom form editor and re-publish (see figure 16.1 in Admin section below). The administrator can also make field required.

Payoffs

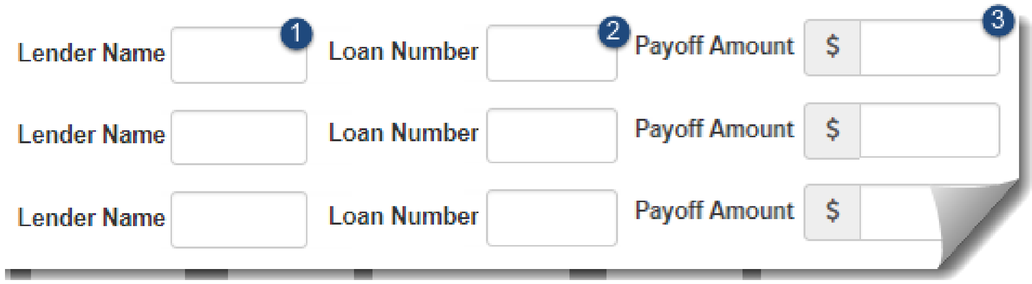


Figure 6.0 - Payoffs Section

Payoffs Section		
Ref#	Field	Description
1	Lender Name	Enter the Lender Name.
2	Loan Number	Enter the Loan Number.
3	Payoff Amount	Enter the Payoff Amount.

Notes and Attachments *(Updated)*

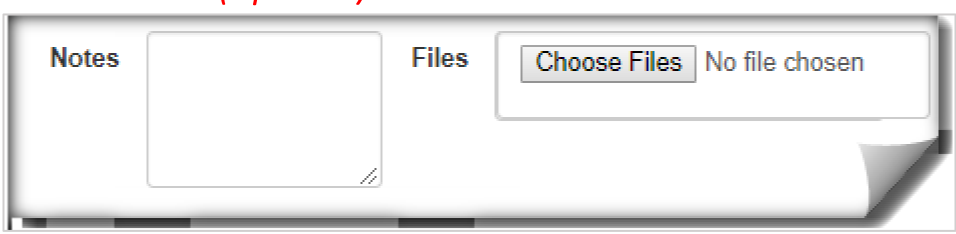


Figure 7.0 - Notes and Attachments Section

Notes and Attachments Section		
Ref#	Field	Description
1	Notes	Enter any notes to be submitted with order.
2	Files	Attach a file to the order. - A validation error will appear if the file type is not supported, see figure 7.1 below - An order failure error will appear after user clicks submit when the attached file contains a security risk, see figures 7.2 and 7.3 below.

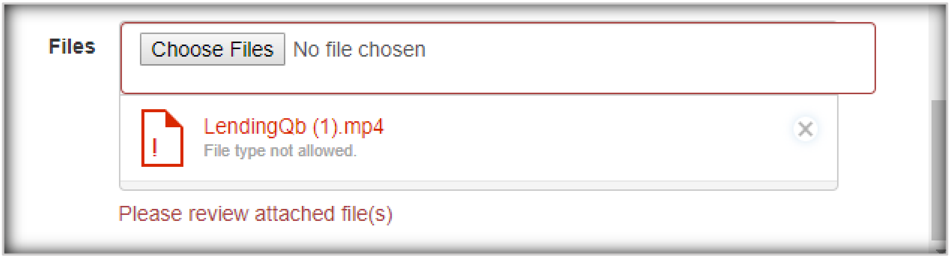


Figure 7.1 – Validation Error for Invalid File Type

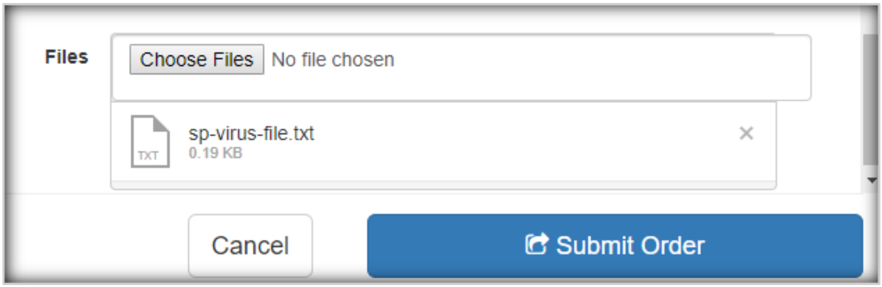


Figure 7.2 – Example of Attachment with Security Risk

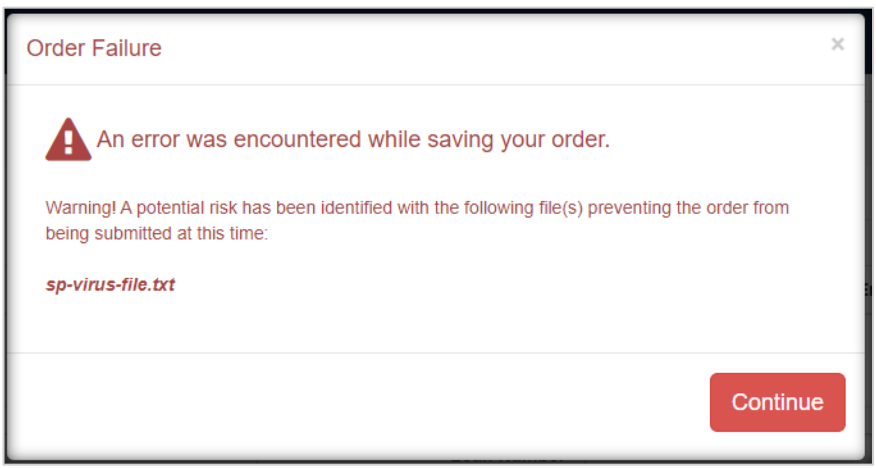


Figure 7.3 – Example of Error Message for Security Risk

Custom Form Editor - *Administrators*

SoftPro Live Administrators have the option to customize the layout of the WOE form (ONE CUSTOMIZED FORM PER SERIAL NUMBER). Updates can be saved as a draft to be published at a later time or can be published immediately to their ends users on the web.

The WOE form is available out of the box to all SPLive users without any additional setup by Administrators. However, some newly added fields are hidden by default. Administrator involvement is required to make these fields available to end users.

How to Customize the Form

Once the Admin has determined which modification are necessary on the WOE form they will simply open the Custom Form Editor to begin making updates. On the Custom Form Editor the Admin is allowed to show or hide a field or section, make fields required or leave them optional, modify what values are displayed and the order in which they appear in the dropdown. To access the custom form editor, follow the steps below:

1. Log into SoftPro Live using Administrator credentials
2. Click on 'Administration' > select 'Web Order Entry' tab
3. Custom Form Editor screen is displayed
4. Make necessary updates to custom form editor
5. Choose to Save or Publish. If you wish to cancel updates, simply close the Customer Details tab.

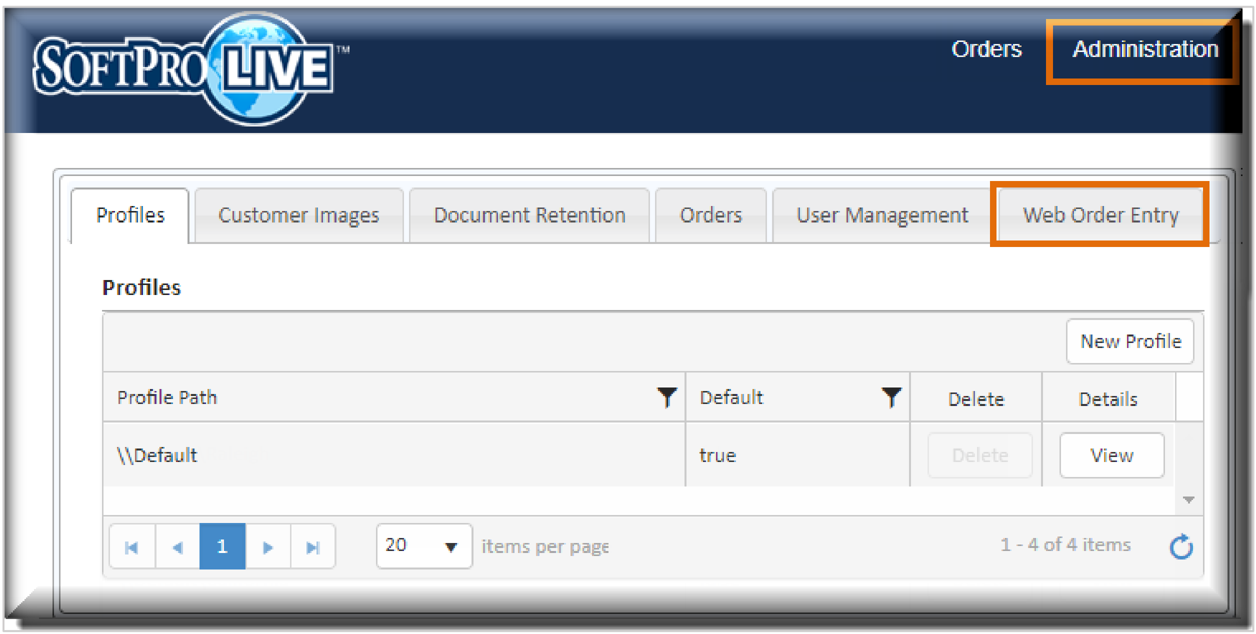


Figure 8.0 – View Customer Details

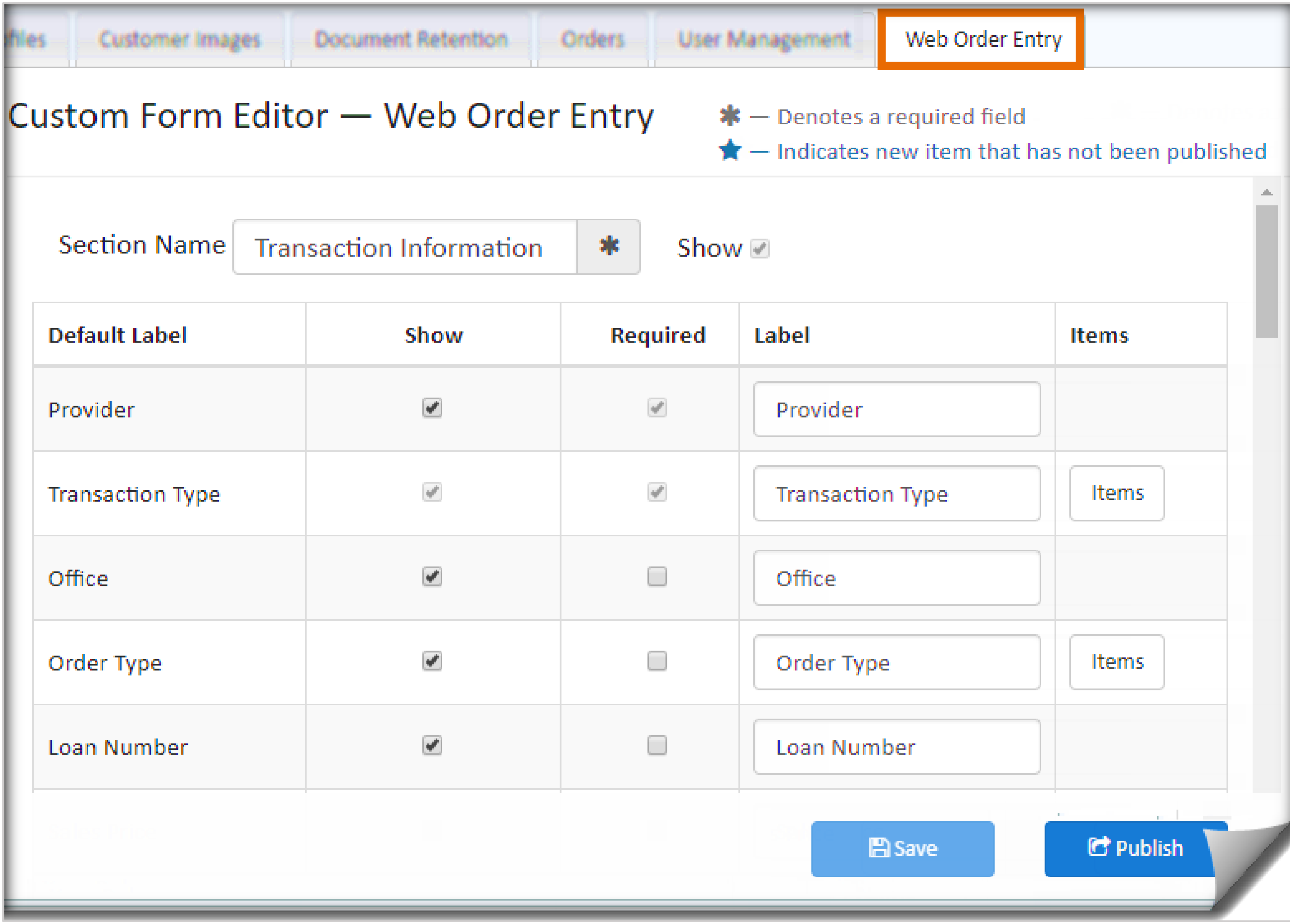


Figure 9.0 – Accessing the Custom Form Editor

Custom Form Editor Details

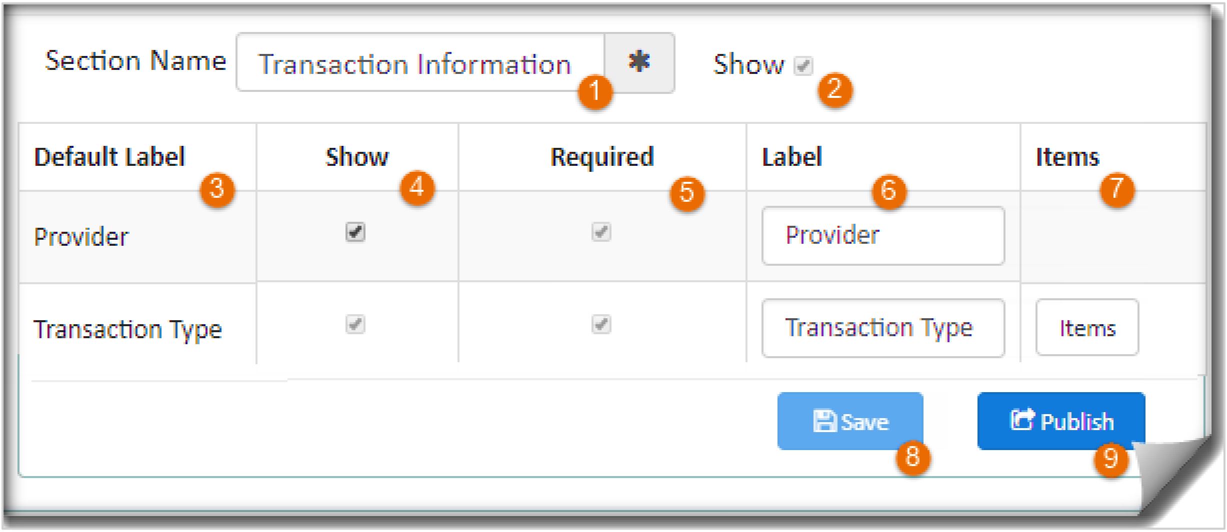


Figure 10.0 – Custom Form Editor

Custom Form Editor Details		
Ref#	Field	Description
1	Section Name	Section name label text can be modified or removed (blank).
2	Show Section	Checkbox is checked by default to display section. Uncheck checkbox to hide section. NOTE: some sections cannot be hidden, i.e. – Transaction Information section.
3	Default Label	Default field label for Admin to reference if field label is modified
4	Show Field	Checked by default to display field. Uncheck to hide field. Note: some fields cannot be hidden, i.e. – Transaction Type in Transaction Information section.
5	Required Field	Unchecked by default unless it is a system required field, i.e. – Provider. Note: If a field is made required but is also made hidden the form will still be able to be submitted.
6	Label	Field label that can be modified or removed (blank).
7	Items	Click “Items” button to view or modify what values are displayed in drop down fields.
8	Save Button	Click Save to save a draft of your changes. Changes are not be available to end users until the customized form is published. Note: Save button remains disabled until changes are made to the form.
9	Publish Button	Click Publish for end users to immediately use the updated form.

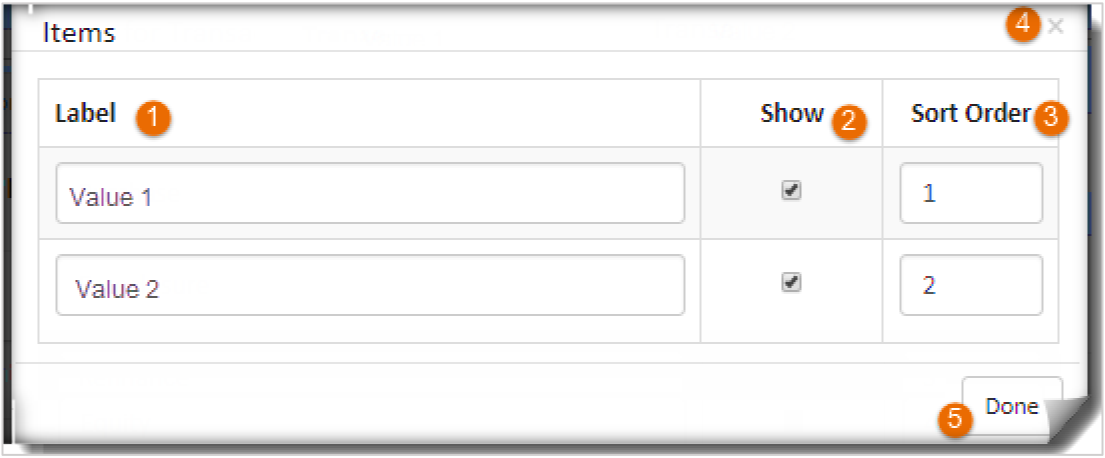


Figure 10.1 – Items dialog for dropdown values

Items Details		
Ref#	Field	Description
1	Label	Value displayed in the dropdown field on the WOE form. The default value is the current mapping to the SoftPro order. Admins can change this value so WOE users see a different option in the dropdown and it will map to the applicable field value in order. An error is displayed if the Admins entered a value that is duplicated or empty. *If the value cannot be found in the order then it will be written to Order notes.*
2	Show	Checkbox is checked by default to display dropdown value. Uncheck to hide.
3	Sort Order	Sort order of dropdown values can be changed to control which values appear first or last in a dropdown. An error is displayed if the sort orders are duplicated or empty.
4	X	Click 'x' to close Items dialog without saving changes.
5	Done	Click 'Done' to close Items dialog and commit changes. Note: Validation error will display after clicking 'Done' if invalid values exist.

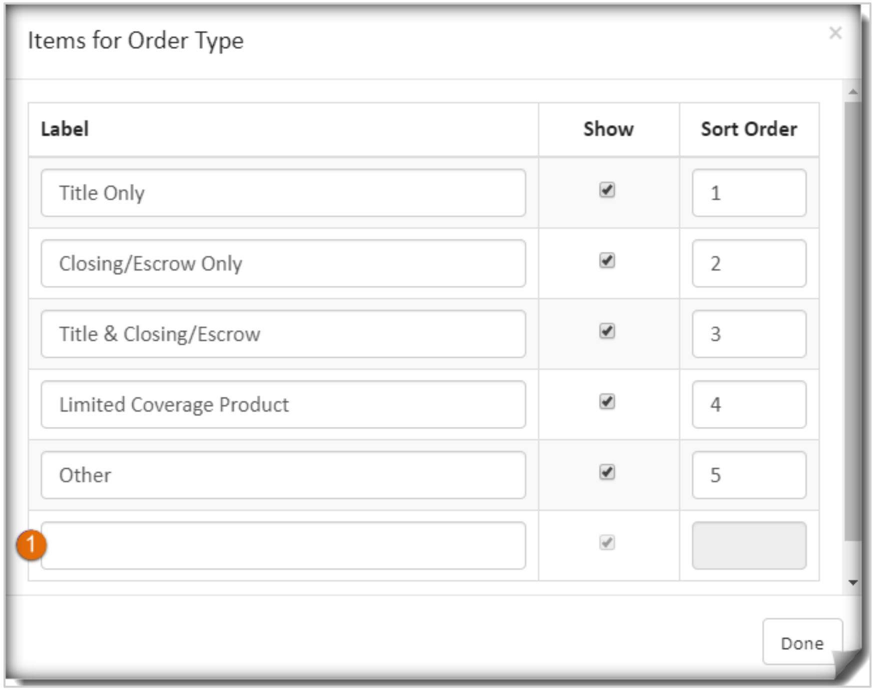


Figure 10.2 – Order Type Items dialog

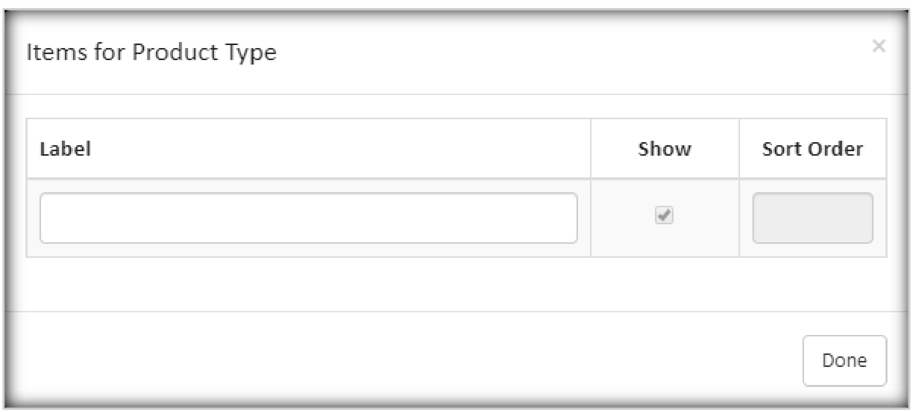


Figure 10.3 – Product Type Items dialog

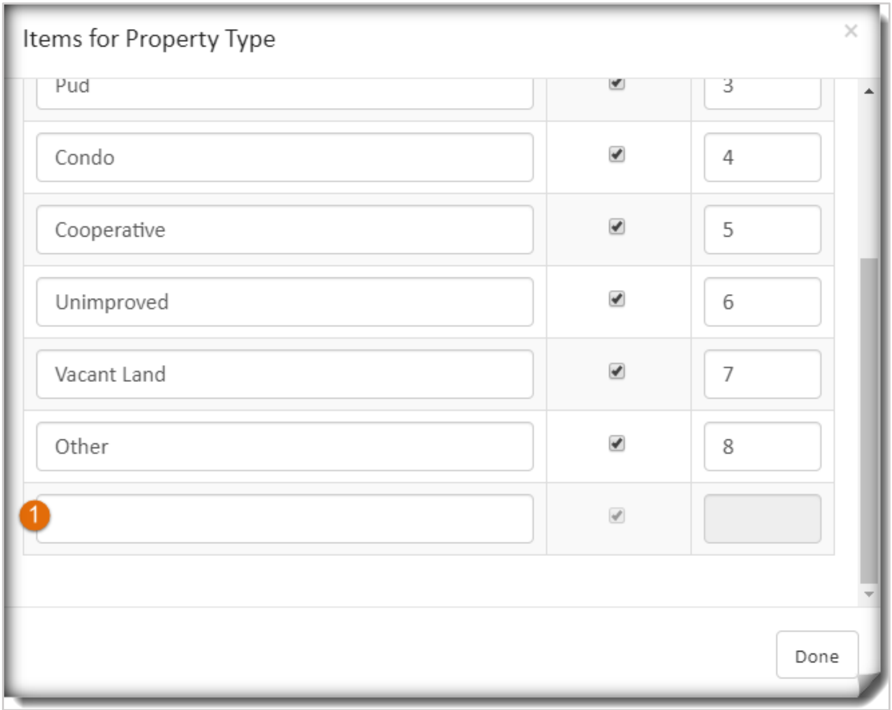
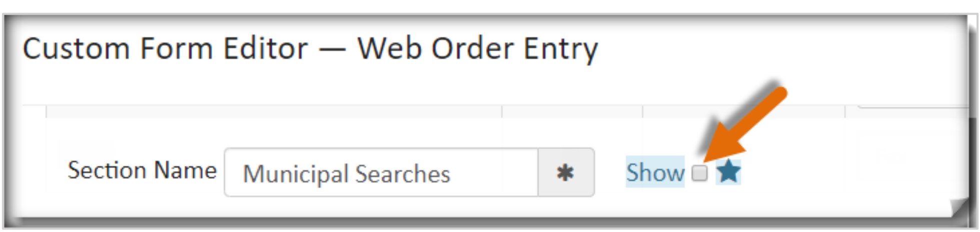


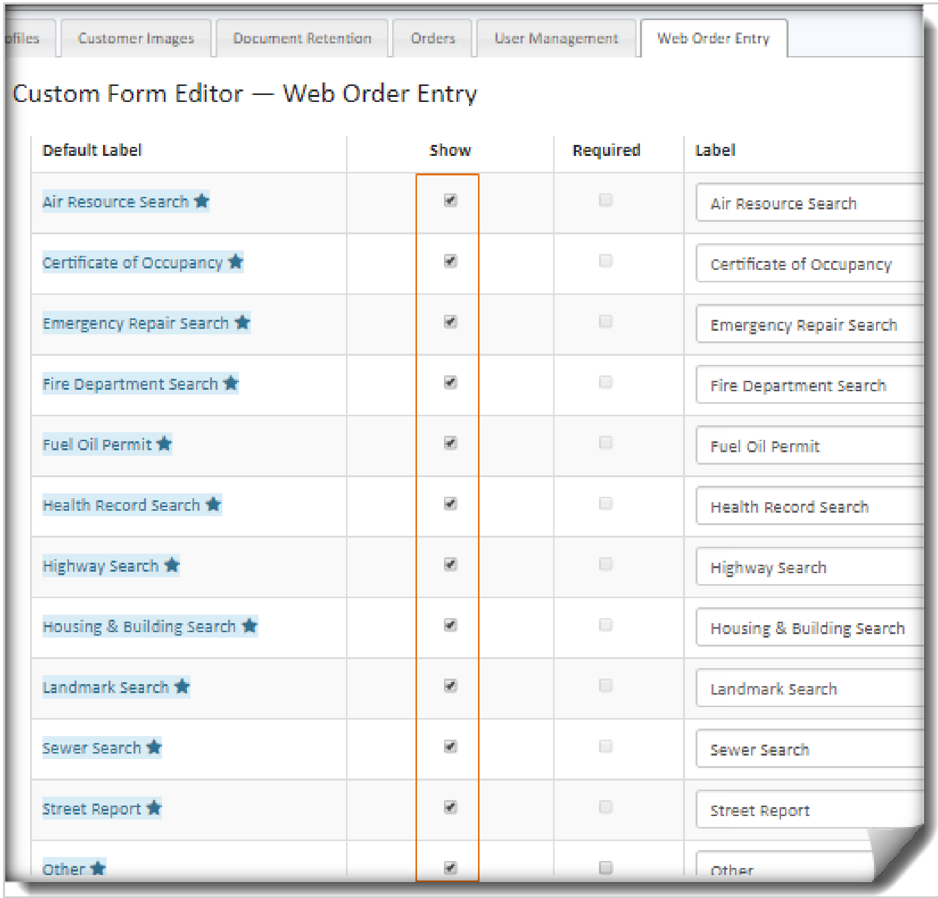
Figure 10.4 – Property Type Items dialog

Order Type and Property Type		
Ref#	Field	Description
1	Empty Default Row	Admins have the ability to add their own values to the Order Type, *Product Type* ***(New)*** & Property Type dropdowns. An empty row is displayed by default and as soon as a value is entered the row will be checked "Show" and sort order will increment to the next available number. Values will map to the applicable field value in order. An error is displayed if the Admins entered a value that is duplicated or empty. **If the value cannot be mapped in the order then it will be written to Order notes.*

Municipal Searches

Municipal Searches is a newly added section on the Custom Form Editor. It is not included on the default Web Order Entry form. To use this section, Administrators need to "Show" the section and all fields within the section before publishing to end users.





ofiles | Customer Images | Document Retention | Orders | User Management | Web Order Entry

Custom Form Editor — Web Order Entry

Default Label	Show	Required	Label
Air Resource Search ★	☑	☐	Air Resource Search
Certificate of Occupancy ★	☑	☐	Certificate of Occupancy
Emergency Repair Search ★	☑	☐	Emergency Repair Search
Fire Department Search ★	☑	☐	Fire Department Search
Fuel Oil Permit ★	☑	☐	Fuel Oil Permit
Health Record Search ★	☑	☐	Health Record Search
Highway Search ★	☑	☐	Highway Search
Housing & Building Search ★	☑	☐	Housing & Building Search
Landmark Search ★	☑	☐	Landmark Search
Sewer Search ★	☑	☐	Sewer Search
Street Report ★	☑	☐	Street Report
Other ★	☑	☐	Other

Validation Errors *(Updated)*

Required Fields (WOE)

- Fields made required on the Custom Form Editor will display validation text immediately on the WOE form when published. However, fields in the Parties and Contacts section will only display validation text after user does the following:
  - Adds the party or contact to the order, by clicking the “Add” button.
  - User puts focus into the party or contact fields and tabs out.
- Fields made required on the Custom Form Editor that are not displayed on WOE form (i.e. – show checkbox is unchecked or business rules prevents the field from being displayed) the required field text will not be displayed and The user should still be able to submit the order.
- The Submit Order Button will remain disabled until all required fields are filled out.

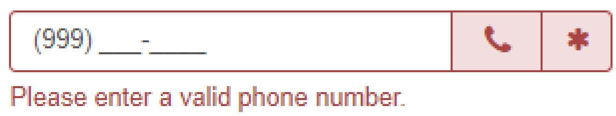
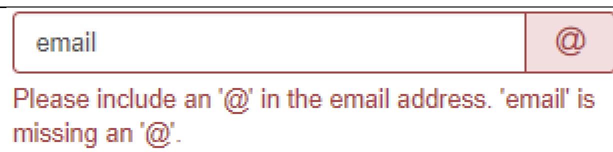
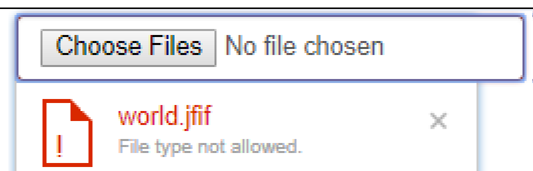
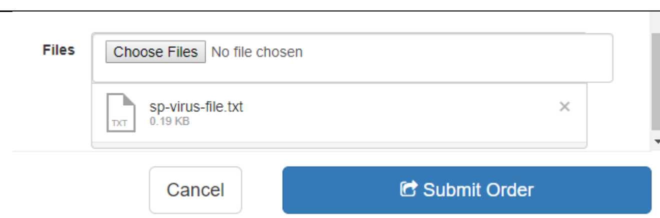
Dropdown fields	Select Transaction Type ▾ ✱ Please select an item in the list.
Text fields	$ ✱ Please fill out this field.

Submit Order	

Figure 11.0 – WOE Validation Errors (Required Fields)

Invalid Data (WOE)

- Fields entered with invalid data on the WOE form will display validation text immediately after the data is entered and user tabs out.

Phone or Mobile	
Email	
Attachments	
Attachments with Security Risks (Virus Scanning Feature)	

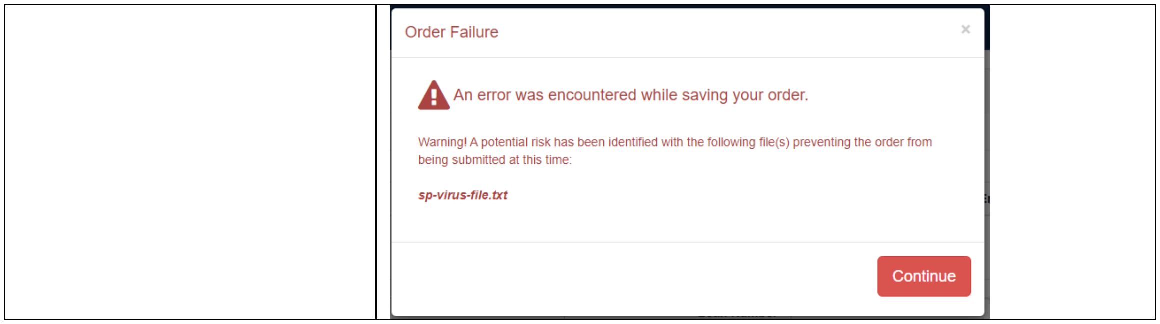


Figure 11.1 – WOE Validation Errors (Invalid Data)

Invalid Data (Custom Form Editor)

- Fields entered with invalid data on the Custom Form Editor will display immediately on the Items dialog for dropdown values.

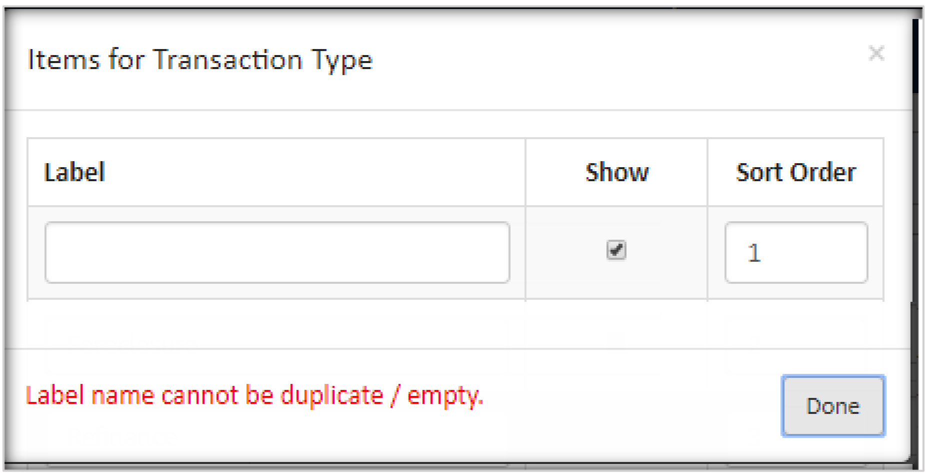


Figure 12.0 – Form Editor Validation Errors (Invalid Data)

Office Name

Administrators can enter an office name for the profile associated to their Provider – see Figure 13.0. Once entered, this value appears in the “Office” dropdown on the WOE form for end users – see Figure 13.1. NOTE: If multiple profiles are associated to a Provider then the office name for each profile appears in the “Office” dropdown. This provides end users with the ability to choose the specific office they wish to place their order with.

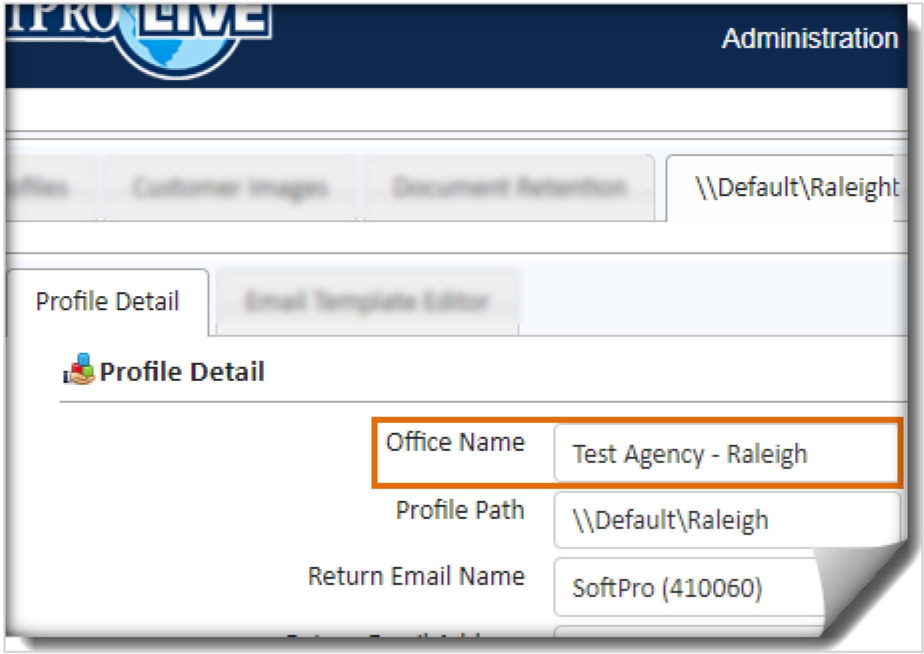
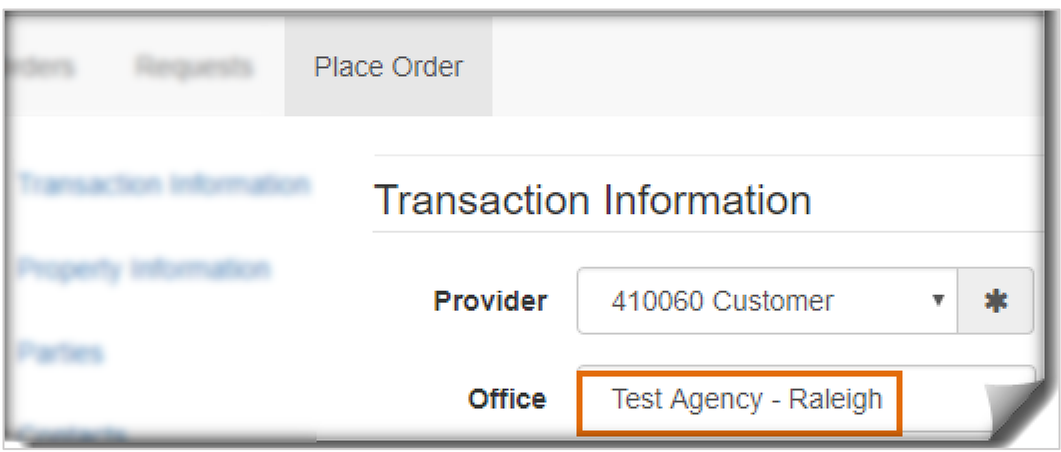


Figure 13.0 – Office Name (Administration > 'View' profile > Profile Detail screen)



13.1 – Web Order Entry (Office)

Viewing Orders in the 360 Queue (by Office)

When "Office" is submitted with an order, the selected office is displayed in the Provider's 360 Queue under the "Provider Reference Name" column – see figure 14.0. The 360 user can easily sort this column to view orders placed for a specific office by clicking on the column header. They can also utilize the 360 Queue view options (edit or create new view) to filter by Provider Reference Name – see figure 14.1. With this filter applied, users will only see orders submitted for that specific office.

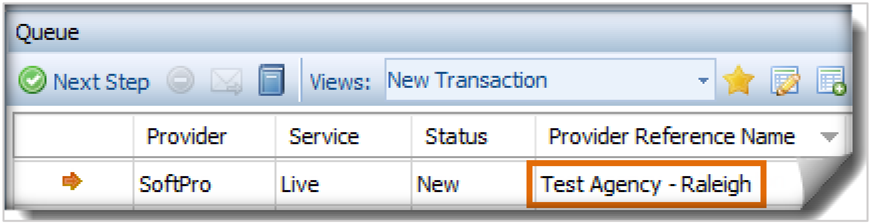


Figure 14.0 – 360 Queue (Provider Reference Name)

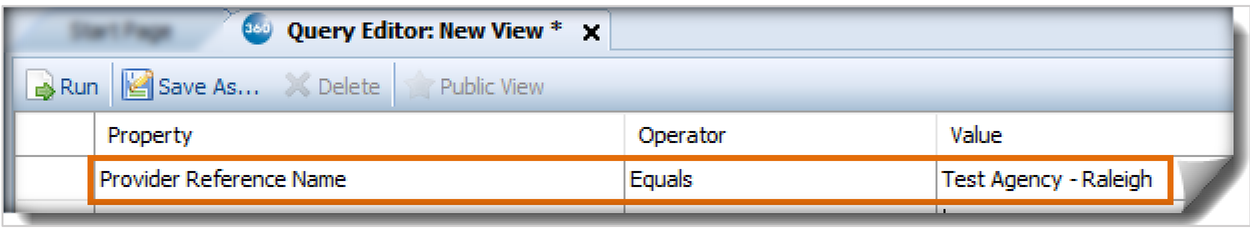


Figure 14.1 – Filter Orders (by Office)

Receiving Email Notifications (by Office)

Additionally, when the “Office” is selected and submitted with an order, the email address associated to the office Profile will be used for sending email notifications. Previously, email notifications were routed to a single email address since there was no convenient way to identify which office the order was submitted to – see figure 15.0.

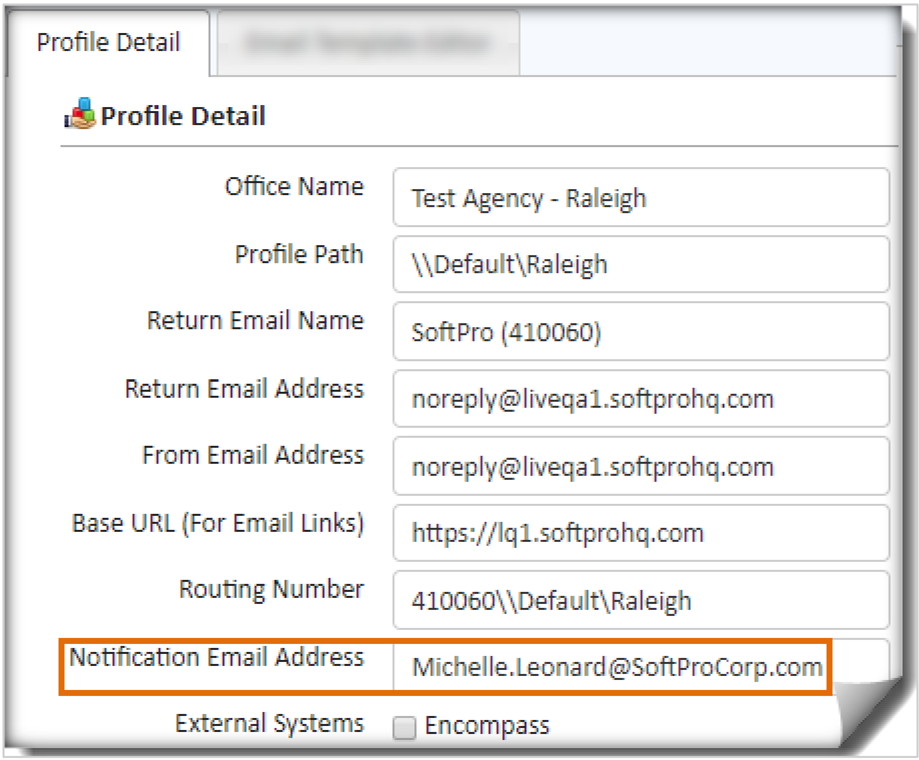


Figure 15.0 – Email Notifications (by Office)

Newly Added Fields to the Custom Form Editor

In future releases, new fields added to the WOE form by system updates will not automatically be published to end users. Administrators must first go into the Custom Form Editor to make the new field shown and publish to end users. There will be a visual indicator for Administrators to easily notice the field is new and has not yet been published.

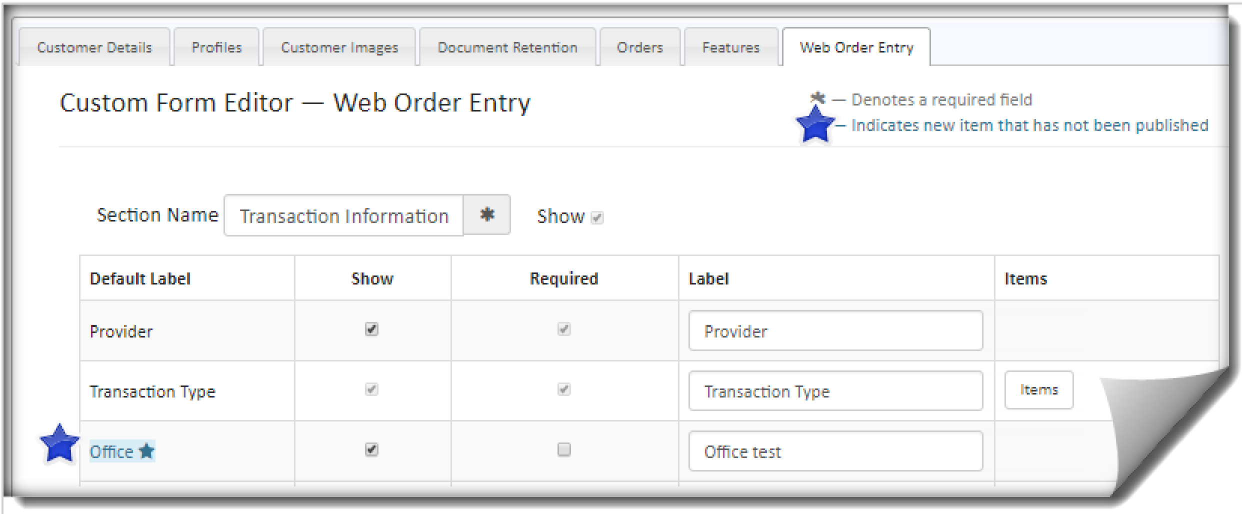


Figure 16.0 – Some system updated fields have 'Show' checked by default

Figure 16.1 – While other system updated fields have 'Show' ***un***checked by default

SoftPro Select

SPLive WOE Field	Select Field Code	Type
Provider	Notes	N/A
Transaction Type	Order.TransactionType	Group Box
Office	Notes	N/A
Loan Number	Order.Loans.Number	
Order Type	Order.Type	Drop Down
Product Type	Order.ProductType	Drop Down
Sales Price	Order.SalesContract.SalesPrice	Text Box
Project Name	Order.Project	Text Box
Loan Amount	Order.Loans.Funding.LoanAmount	Text Box
Est. Settlement Date	Order.SettlementDate	Drop Down
Est. Settlement Date	Order.IsSettlementDateEstimated	Checkbox
2nd Loan Amount	Notes	N/A
Marketing Rep	Notes	N/A
Settlement Services	Notes	N/A
Reverse Mortgage	Notes	N/A
Order Subordination	Notes	N/A
Existing Mortgage Being Assigned	Notes	N/A
Municipal Searches Required	Notes	N/A
Survey Instructions	Notes	N/A
Property Type	Order.Properties.Type	Dropdown
Property Address	Order.Properties.Address.Address1	Text Box
Property Zip Code	Order.Properties.Address.Zip	Text Box
Property City	Order.Properties.Address.City	Text Box
Property State	Order.Properties.Address.State	Dropdown
Property County	Order.Properties.County	Text Box
Property Lot	Order.Properties.Lots.Number	Text Box
Property Block	Order.Properties.Block	Text Box
Property Section	Order.Properties.Section	Text Box
Property District	Order.Properties.District	Text Box
Property APN/PID	Order.Properties.Parcels.Identification	Text Box
Property Tax Map ID	Order.Properties.TaxMaps.Identification	Text Box
Property Tract	Order.Properties.CensusTract	Text Box
Property Subdivision	Order.Properties.Subdivision	Text Box
Property Brief Legal	Order.Properties.EscrowBriefLegal	Text Box
Party Type Individual	Buyer/Seller Individual	Radio Button
Party Type Organization	Buyer/Seller Organization	Radio Button
Party Type Joint	Buyer/Seller Type	Drop down
Party Individual 1 First Name	Buyer/Seller Individual1.FirstName	Text Box
Party Individual 1 Middle Name	Buyer/Seller Individual1.MiddleName	Text Box
Party Individual 1 Last Name	Buyer/Seller Individual1.LastName	Text Box
Party Individual 1 Suffix	Buyer/Seller Individual1.Suffix	Text Box
Party Fax	Buyer/Seller Individual1.Fax	Text Box

SPLive WOE Field	Select Field Code	Type
Party Cell	Buyer/Seller Individual1.Cell	Text Box
Party Email	Buyer/Seller Individual1.Email	Text Box
Party Individual 2 First Name	Buyer/Seller Individual2.FirstName	Text Box
Party Individual 2 Middle Name	Buyer/Seller Individual2.MiddleName	Text Box
Party Individual 2 Last Name	Buyer/Seller Individual2.LastName	Text Box
Party Individual 2 Suffix	Buyer/Seller Individual2.Suffix	Text Box
Use Property Address	N/A	
Party Address	Buyer/Seller Address.Address1	Text Box
Party City	Buyer/Seller Address.City	Text Box
Party State	Buyer/Seller Address.State	Dropdown
Party Zip	Buyer/Seller Address.Zip	Text box
Party Organization Name	Order.Contacts.Name	Text Box
Party Organization Address	Order. Contacts.Address.Address1	Text Box
Party Organization City	Order.Contacts.Address.City	Text Box
Party Organization State	Order.Contacts.Address.State	Drop down
Party Organization Zip	Order.Contacts.Address.Zip	Text Box
Party Organization Phone	Order.Contacts.Phone	Text Box
Party Organization Email	Order.Contacts.Email	Text Box
Party Organization Fax	Order.Contacts.Fax	Text Box
Contact Type (All Types supported in SPS)	Abstractor, Attorney (represents buyer), Attorney (represent seller), Attorney (represents lender), Builder, Escrow Company, General Contractor, Government, Hazard Insurance Agent, HOA, HOA Management Company, Home Inspector, Lender, Listing Agent, Loan Servicer, Mortgage Broker, Other Contact, Payoff Lender, Pest Inspector, Qualified Intermediary, Selling Agent, Settlement Agent, Appraiser, Subcontractor, Surveyor, Title Company, Underwriter	Text Box
Contact Company	Order.<ContactType>s.Name	Text Box
Contact First Name	Order.<ContactType>s.MainPerson.FirstName	Text Box
Contact Last Name	Order.<ContactType>s.MainPerson.LastName	Text Box
Contact Address	Order.<ContactType>s.Address.Address1	Text Box
Contact City	Order.<ContactType>s.Address.City	Text Box
Contact State	Order.<ContactType>s.Address.State	Dropdown
Contact Zip	Order.<ContactType>s.Address.Zip	Text Box
Contact Phone	Order.<ContactType>s.Phone	Text Box
Contact Mobile	Order.<ContactType>s.MainPerson.Cell	Text Box
Contact Fax	Order.<ContactType>s.Fax	Text Box
Contact Email	Order.<ContactType>s.Email and Order.<ContactType>s.MainPerson.Email	Text Box
Lender Contact Proposed Insured Clause	Order.Lenders.ProposedInsuredClause	Text Box
Payoff Section (All fields)	Notes	N/A
Notes	Notes	N/A
Attachments	Attachments	N/A

Custom Fields (NY Document Package Fields)

SPLive WOE Field	Mapping to SPS NY DOC Package fields	Type
Air Resource Search	Order.AirResourcesRequested_NY#	Yes/No Dropdown

Certificate of Occupancy	Order.CertificateOfOccRequested_NY#	Yes/No Dropdown
Emergency Repair Search	Order.EmergencyRepairsRequested_NY#	Yes/No Dropdown
Fire Department Search	Order.FireDeptSearchRequested_NY#	Yes/No Dropdown
Fuel Oil Permit	Order.FuelOilPermitRequested_NY#	Yes/No Dropdown
Health Record Search	Order.HealthDepartmentRequested_NY#	Yes/No Dropdown
Highway Search	Order.HighwaySearchRequested_NY#	Yes/No Dropdown
Housing & Building Search	Order.HousingAndBuildingRequested_NY#	Yes/No Dropdown
Landmark Search	Order.LandmarkRequested_NY#	Yes/No Dropdown
Sewer Search	Order.SewerSearchRequested_NY#	Yes/No Dropdown
Street Report	Order.StreetReportRequested_NY#	Yes/No Dropdown
Other	Order.OtherSearchType_NY#	Text Box

Classic (Standard & Enterprise)

SPLive WOE Field	Classic Field Code	Type
Provider	Notes	N/A
Transaction Type	PURCREFI	Group Box
Office	Notes	N/A
Loan Number	LOANNUMB	Text Box
Order Type	N/A	Notes
Product Type	PRODCODE & Notes	Text Box & Notes
Sales Price	SALEPRIC	Text Box
Project Name	Notes	N/A
Loan Amount	LOANAMT	Text Box
Est. Settlement Date	SETTDATE, SETTTIME & Notes	Text Box
Est. Settlement Date	N/A	N/A
2nd Loan Amount	Notes	N/A
Marketing Rep	Notes	N/A
Settlement Services	Notes	N/A
Reverse Mortgage	Notes	N/A
Order Subordination	Notes	N/A
Existing Mortgage Being Assigned	Notes	N/A
Municipal Searches Required	Notes	N/A
Survey Instructions	Notes	N/A
Property Type	PROPTYPE	Dropdown
Property Address	PROPSTRE	Text Box
Property Zip Code	PROPZIP	Text Box
Property City	PROPCITY	Text Box
Property State	STATELET	Dropdown
Property County	COUNTY	Text Box
Property Lot	LOTUNIT	Text Box
Property Block	BLKBLDG	Text Box
Property Section	Order.Properties.Section	Text Box
Property District	Notes	N/A
Property APN/PID	TAXMAPID	Text Box
Property Tax Map ID	PARCELID	Text Box

SPLive WOE Field	Classic Field Code	Type
Property Tract	CENTRACT	Text Box
Property Subdivision	SUBDIVN	Text Box
Property Brief Legal	BLEGAL1	Text Box
Party Type Individual	BYR1MFPC, SLR1MFPC	Drop down
Party Type Organization	BYR1MFPC, SLR1MFPC	Drop down
Party Organization Name	BYR1NAM1, SLR1NAM1	Text Box
Party Type Joint	BYR1MFPC, SLR1MFPC	Drop down
Party Individual 1 First Name	BYR1NAM1, SLR1NAM1	Text Box
Party Individual 1 Middle Name	BYR1NAM1, SLR1NAM1	Text Box
Party Individual 1 Last Name	BYR1NAM1, SLR1NAM1	Text Box
Party Individual 1 Suffix	BYR1NAM1, SLR1NAM1	Text Box
Party Fax	BYR1FAX1, SLR1FAX1	Text Box
Party Cell	BYR1CELL1, SLR1CELL1	Text Box
Party Email	BYR1EMAIL, SLR1EMAIL	Text Box
Party Individual 2 First Name	BYR1NAM1, SLR1NAM1	Text Box
Party Individual 2 Middle Name	BYR1NAM1, SLR1NAM1	Text Box
Party Individual 2 Last Name	BYR1NAM1, SLR1NAM1	Text Box
Party Individual 2 Suffix	BYR1NAM1, SLR1NAM1	Text Box
Use Property Address	N/A	N/A
Party Address	BYR1ADR1,SLR1ADR1	Text Box
Party City	BYR1ADR2,SLR1ADR2	Text Box
Party State	BYR1ADR2,SLR1ADR2	Dropdown
Party Zip	BYR1ADR2,SLR1ADR2	Text box
Contact Type (limited mapping for Classic)	Attorney (represents buyer) = BYRAT Attorney (represent seller) = SLRAT Builder = GENCON HOA Management Company = HOA1 Lender = LEN Listing Agent = AG701 Loan Servicer = SVR Mortgage Broker = MTB Selling Agent = AG702 Settlement Agent = FIRM Title Company = TITL Underwriter = UND	Text Box
Contact Company	FIRMNAME, TITLNAM, UNDNAME, MTBNAME, SVRNAME, AG701NAM, AG702NAM, BYRATFIR, SLRATFIR, LENNAM1, GENCON, HOA1NAME, HOA1MGMT	Text Box
Contact First Name	FIRMCONT, TITLCONT, UNDCONT, MTBCONT, SVRCONT, AG701FRM, AG702FRM, BYRATNAM, SLRATNAM, LENCONT, GENCONNM	Text Box
Contact Last Name	FIRMCONT, TITLCONT, UNDCONT, MTBCONT, SVRCONT, AG701FRM, AG702FRM, BYRATNAM, SLRATNAM, LENCONT, GENCONNM	Text Box
Contact Address	FIRMADR1, TITLAD1, UNDADR1, MTBADR1, SVRADR1, AG701AD1,	Text Box

SPLive WOE Field	Classic Field Code	Type
	AG702AD1, BYRATAD1, SLRATAD1, LENADR1, GENCONAD1, HOA1ADR1	
Contact City	FIRMADR2, TITLAD2, UNDADR2, MTBADR2, SVRADR2, AG701AD2, AG702AD2, BYRATAD2, SLRATAD2, LENDADR2, GENCONAD2, HOA1ADR2	Text Box
Contact State	FIRMADR2, TITLAD2, UNDADR2, MTBADR2, SVRADR2, AG701AD2, AG702AD2, BYRATAD2, SLRATAD2, LENDADR2, GENCONAD2, HOA1ADR2	Text Box
Contact Zip	FIRMADR2, TITLAD2, UNDADR2, MTBADR2, SVRADR2, AG701AD2, AG702AD2, BYRATAD2, SLRATAD2, LENDADR2, GENCONAD2, HOA1ADR2	Text Box
Contact Phone	SETPHONE, TITLPH, UNDPH, MTBPH, SVRPH, AG701PH, AG702PH, BYRATPH, SLRATPH, LENPH, GENCONPH, HOA1PH	Text Box
Contact Mobile	SETCELL, TITLCELL, UNDCELL, MTBCELL, SVRCELL, AG701MO, AG702MO, BYRATMO, SLRATMO, LENCELL, HOA1FX	Text Box
Contact Email	SETTEMAIL, TITLEMAIL, UNDEMAIL, MRBEMAIL, SVREMAIL, AG701EMAIL, AG702EMAIL, BYRATEMAIL, SLRATEMAIL, LENEMAIL,	Text Box
Contact Fax	SETFAX, TITLFX, UNDFX, MTBFX, SVRFX, AG701FX, AG702FX, BYRATFX, SLRATFX, LENFX, GENCONFX	Text Box
Lender Contact Proposed Insured Clause	LPINSD	Text Box
Payoff Section (All fields)	Notes	N/A
Notes	Notes	N/A
Attachments	Attachments	N/A