

CloseSimple - SoftPro360 Integration (v1.0)

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Introduction

CloseSimple is a Settlement Service providing firm which provides the functionality of sending personalized text messages, automated email updates and their Pizza Tracker for title to help drive business forward and save time.

CloseSimple integration with SoftPro 360 will allow CloseSimple users to seamlessly place orders without the need to re-key the information again. The integration will enable the users to view the progress of their CloseSimple file along with the next milestone details.

Launching CloseSimple

Access from 360 Services Menu

From the **360 Services** menu, double-click **CloseSimple – The Pizza Tracker for Title** located under the **Settlement Services** folder.

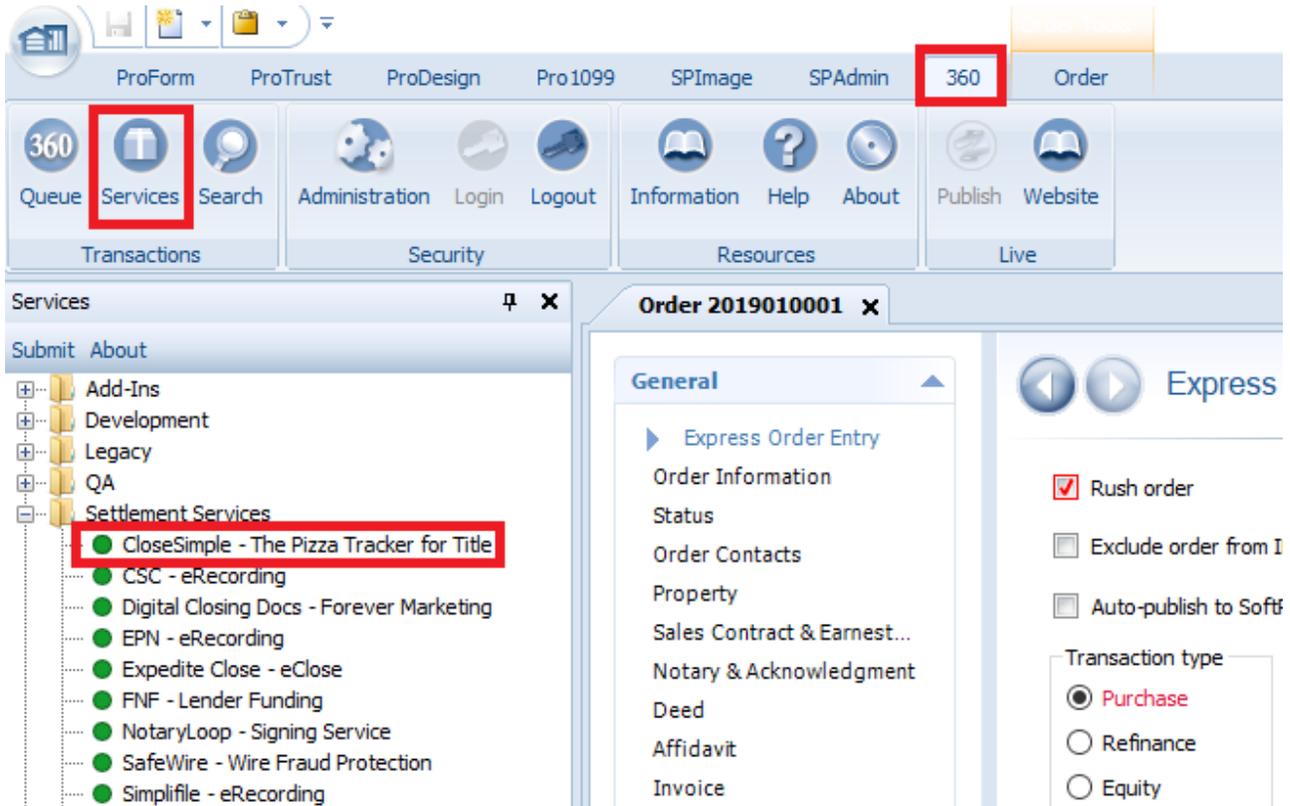


Figure 1: CloseSimple launch screen in 360 Services

Order Linking in CloseSimple

The **Order Linking** screen, will automatically link the order which is open in ProForm. If no orders are open then the following screen will appear:

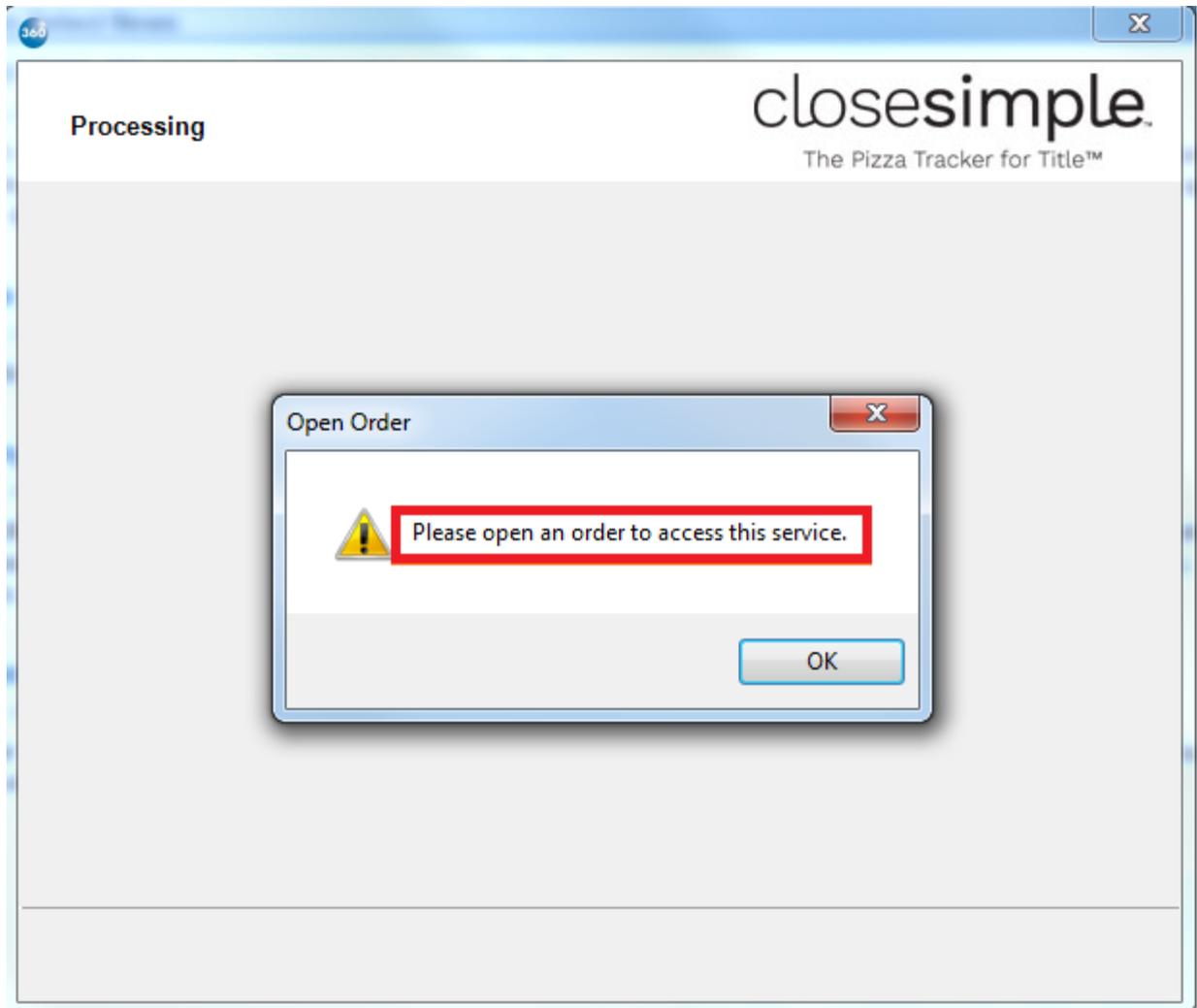


Figure 2: Order Linking Screen for CloseSimple

✚ Click **OK** to navigate back to Select and open an order.

Welcome Screen

The **Welcome** screen provides a summary of the product & CloseSimple’s contact information:

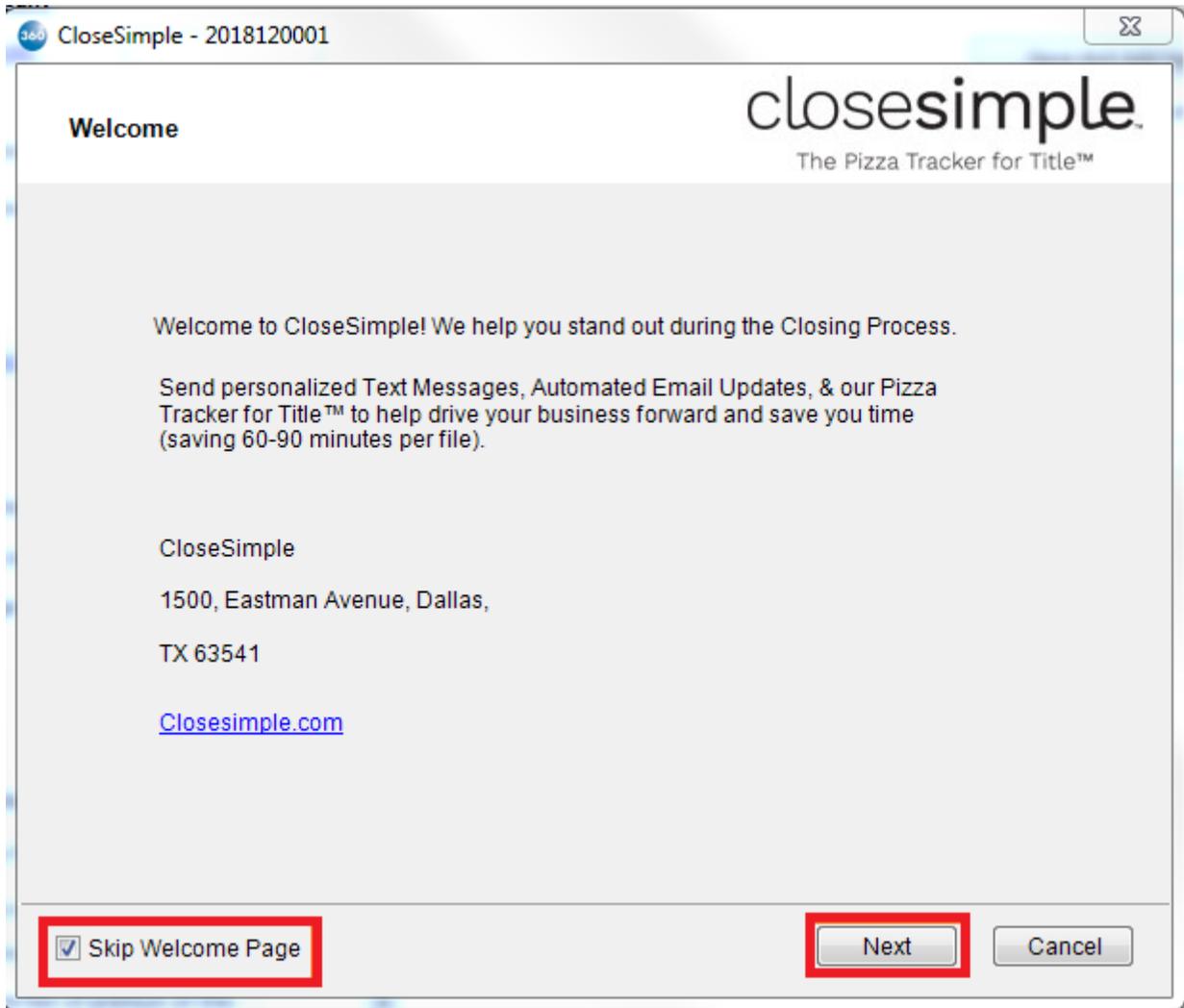


Figure 3: Welcome page of CloseSimple

- Click **Next** to navigate to the **Login** screen.
- Click the **Skip Welcome Page** checkbox to skip this screen for future sessions.

Login Screen

Enter the **User ID and Password** in the CloseSimple login screen. The **Remember me** checkbox will allow you to automatically log in the next time you launch this product.

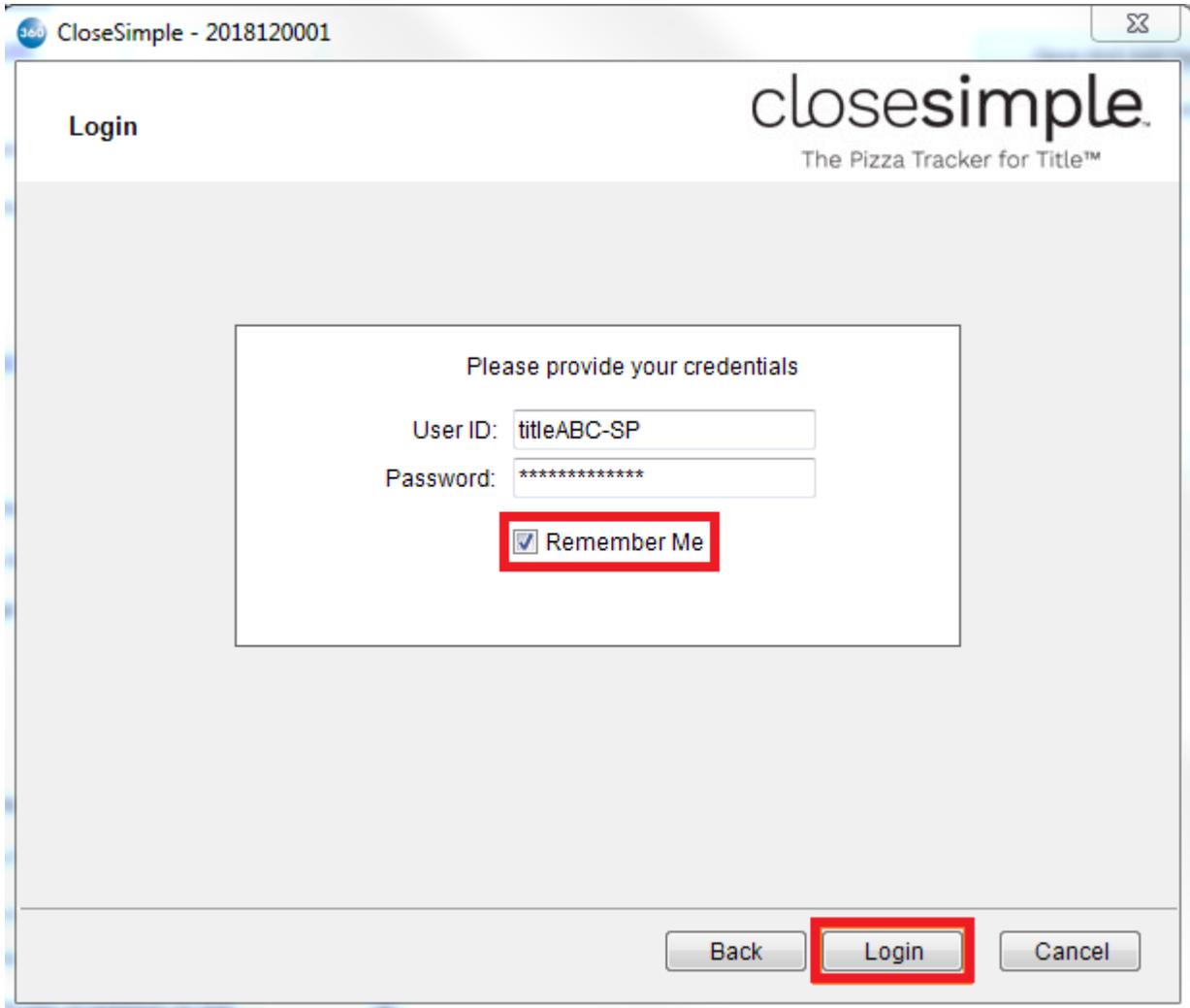


Figure 4: Login Credentials Screen

- Click **Login** to continue to the **Submit** screen.

Submit Screen

On the Submit screen, you can view the information about the **Next Milestone** (hyperlink redirects to the browser) for your file. You can also add **Documents and Notes** in your order to CloseSimple.

Clicking on Submit will redirect the user to the CloseSimple's website on their default browser.

CloseSimple - 2019010001

Submit

close simple
The Pizza Tracker for Title™

Next milestone: [Final Closing Checklist](#)

Documents:

Name	Size
Invoice	0.08 MB

Browse

Attachments

Rename

Delete

Notes: Add to ProForm Notes

This is a test description

Back **Submit** Cancel

Figure 5: Submit Screen for CloseSimple

- **Browse:** This button allows us to browse through the system and search files for attaching in the **Documents** section.
- **Attachments:** This button allows you to view and attach any existing documents from your SoftPro order.
- **Rename:** This button allows you to rename the documents attached in the **Documents** section.
- **Delete:** This button allows us to delete any unrequired documents attached in the Submit screen.
- **Notes:** User can add any notes relating to the order.
- **Add to ProForm Notes:** Clicking this checkbox will add your notes to your ProForm order too.

Access 360 Queue

From the 360 tab, click on **360 Queue** button. SoftPro360 will display the submitted transactions in the queue, where the status will reflect as **Completed** for a successful submit.

The screenshot displays the SoftPro 360 Queue interface. At the top, the '360' tab is highlighted in red. Below the navigation bar, the 'Queue' button is also highlighted in red. The main area shows a list of services on the left and a detailed view of an 'Order 2019010001' on the right. The 'Queue' section at the bottom contains a table with the following data:

Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On	Completed On	Description	Transaction Number
CloseSimple	The Pizza Tracker for Title	Completed	2019010001	Default	Ravindra	1/24/2019 9:33 PM	1/24/2019 9:34 PM		410060-70-190124-164323