

CloseSimple User Guide

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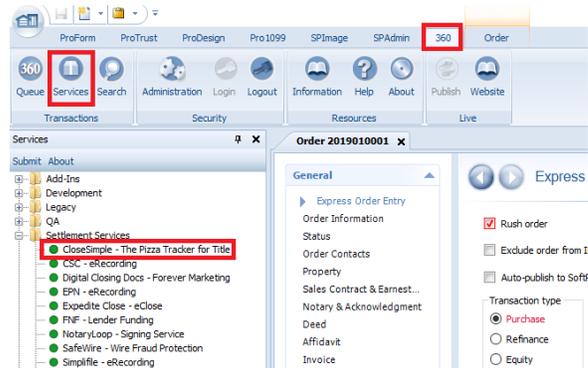
Introduction

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 closing milestone details. The integration will also enable users to review and accept document and notes returned by CloseSimple in to their SoftPro order.

Access from 360 Services Menu

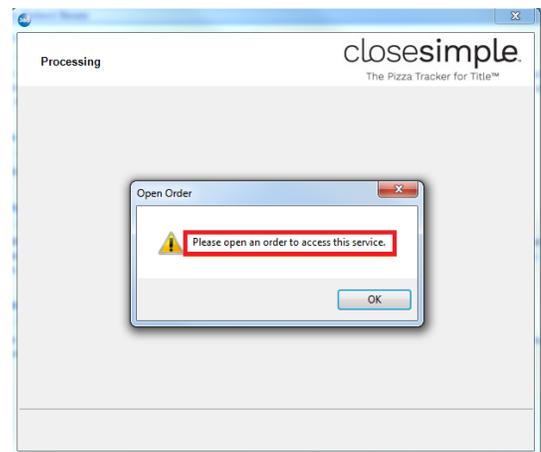
From the **360 Services** menu, double-click **CloseSimple** – **The Pizza Tracker for Title** located under the **Settlement Services** folder.



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:

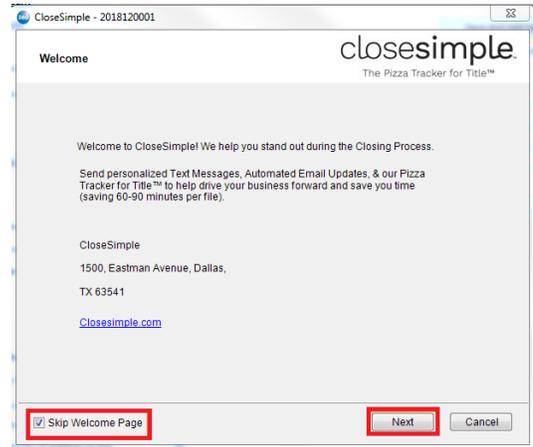
- Click **OK** to navigate back to Select and open an order.



Welcome Screen

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

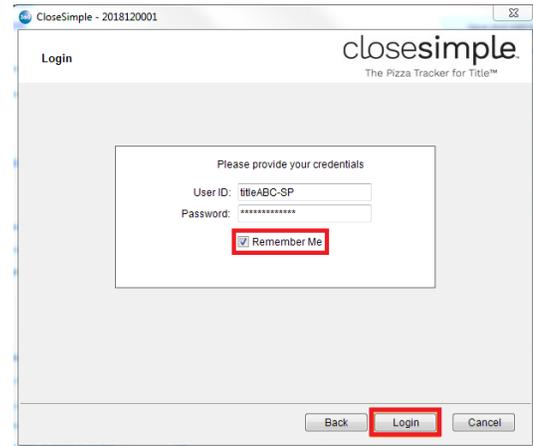
- Click **Next** to navigate to the **Login** screen.
- Click the **Skip Welcome Page** checkbox to skip this screen for future sessions.



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.

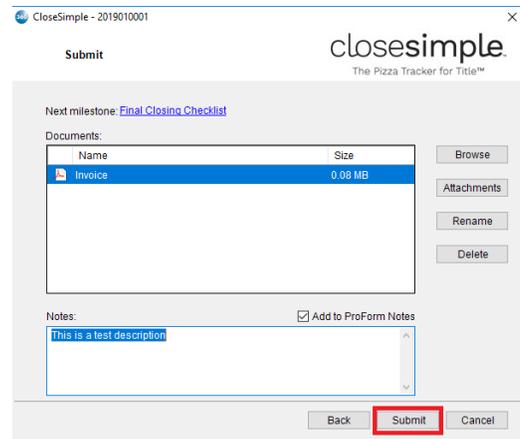
- Click **Login** to continue to the **Submit** screen.



Submit a request to CloseSimple

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.

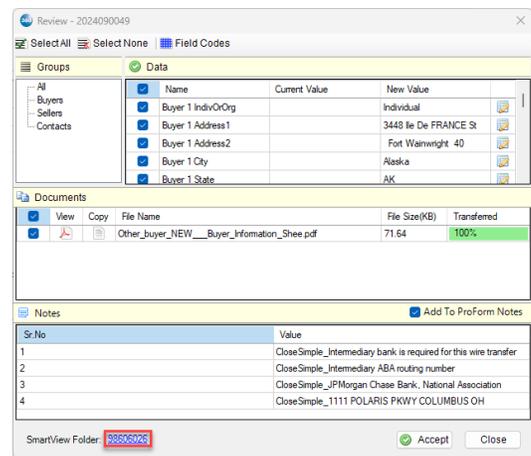


- **Browse** - This button allows the user to browse through the system and search files for attaching in the **Documents** section of this screen.
- **Attachments** - This button allows the user to view and attach any existing documents from your ProForm order.
- **Rename** - This button allows the user to rename the documents attached in the **Documents** section.
Note: *The naming convention for the documents will now allow for special characters. There are further notes in the Automation section as to how it will be handled within the process.*
- **Delete** - This button allows the user to delete any unrequired documents attached in the **Documents** section.
- **Notes** - User can type in any notes relating to the to the order.
- **Add to ProForm Notes (Checkbox)** - Clicking this checkbox will add your notes to your ProForm order.
-

Review Screen – Accepting Data, Documents & Notes

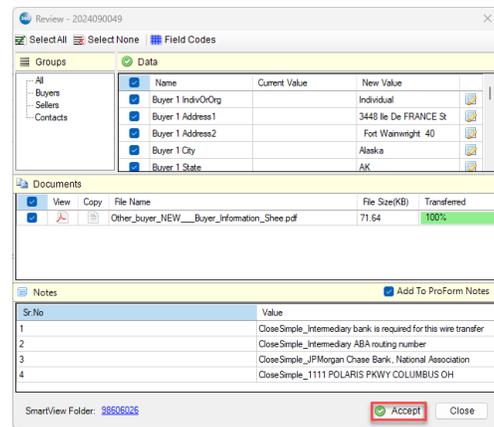
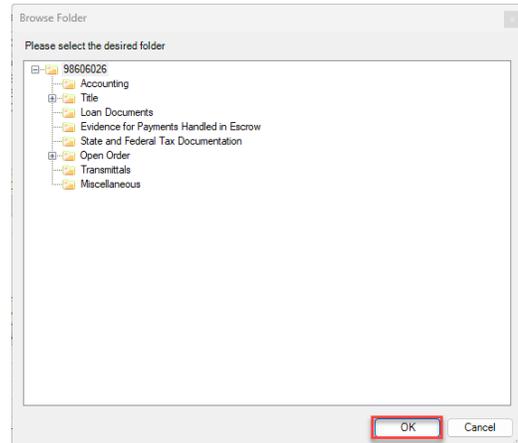
From the Review screen, you will be able to specify the document(s) that you want to write to your ProForm order. Also, you can choose if you want to accept the notes or not.

CloseSimple will return data and document(s) which will be visible on the 360 **Review** Screen. The Review screen allows document(s) to be viewed by clicking the **View** icon. Check the **“Add To ProForm Notes”** checkbox to import the notes to the linked ProForm order.



The integration will now process .eml files and save them to your ProForm order or SmartView.

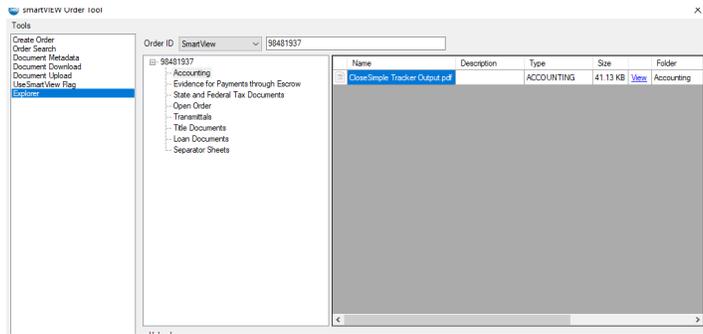
Using the SmartVIEW order link, we can choose the desired SmartVIEW folder to import the CloseSimple documents (Figure 9). Click **Accept** to add the document(s) to the linked SmartVIEW order and notes will be imported to the linked ProForm Order. The document(s) will be available within the SmartVIEW folder that was chosen in the review screen (Figure 12). If the document(s) and notes should not be accepted, the **Close** button closes the Review screen and no documents will be accepted.



The status of the respective transaction in the 360 queue will be updated to “Accepted” after you click on the **Accept** button in the review screen.

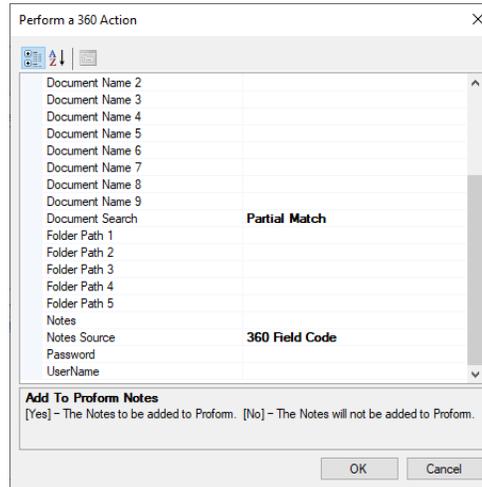
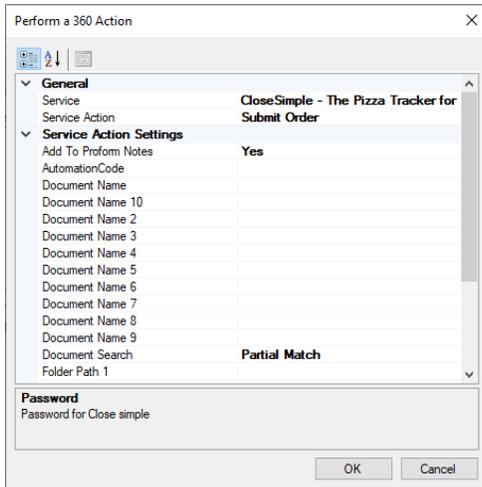
Provider	Service	Status	Linked Order	Linked Profile	Created By
SmartView	Order	Completed	TaxHub1911181652	Default	Iylin Jacob
CloseSimple	The Pizza Tracker for Title	Accepted	019110001	Default	Soumya
CloseSimple	The Pizza Tracker for Title	Completed	019110001	Default	Soumya

The “Accepted” document(s) will be saved in the SmartVIEW folder that was chosen in the review screen.



Submit Automation

Automation processes can be triggered in many different ways. Complete and select all the necessary information presented on the Perform a 360 Action screen. For help, please contact automation@SoftProcorp.com.



General Information

- Service
 - CloseSimple – The Pizza Tracker for Title
- Service Action
 - Submit Order

Service Action Settings

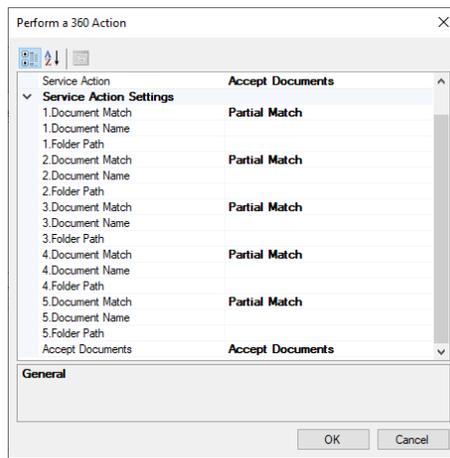
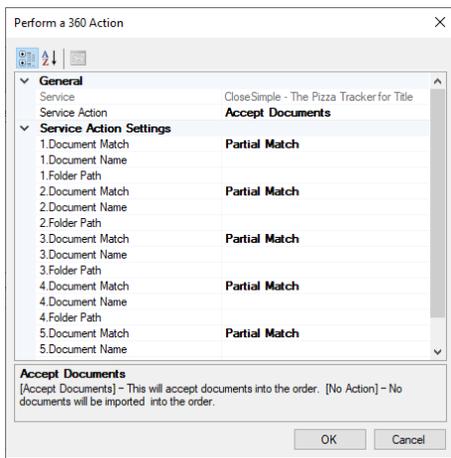
- Add to ProForm Notes
 - Enter Yes to add Notes to the ProForm Order
 - Enter No and the Notes will not be added to the ProForm Order
- Automation Code

-
- Enter AutomationCode for CloseSimple
 - Document Name
 - Enter the name to retrieve the matching documents
 - Document Name 10
 - Enter the name to retrieve the matching documents
 - Document Name 2
 - Enter the name to retrieve the matching documents
 - Document Name 3
 - Enter the name to retrieve the matching documents
 - Document Name 4
 - Enter the name to retrieve the matching documents
 - Document Name 5
 - Enter the name to retrieve the matching documents
 - Document Name 6
 - Enter the name to retrieve the matching documents
 - Document Name 7
 - Enter the name to retrieve the matching documents
 - Document Name 8
 - Enter the name to retrieve the matching documents
 - Document Name 9
 - Enter the name to retrieve the matching documents
 - Document Search
 - Dropdown
 - Partial Match
 - Documents with the partial name will be retrieved from ProForm Attachments
 - Actual Match
 - Documents with the exact name will be retrieved from ProForm Attachments
 - Folder Path 1
 - Enter the folder path of the documents to send to CloseSimple `[[FolderName\FolderPath]]`
 - Folder Path 2
 - Enter the folder path of the documents to send to CloseSimple `[[FolderName\FolderPath]]`
 - Folder Path 3
 - Enter the folder path of the documents to send to CloseSimple `[[FolderName\FolderPath]]`
 - Folder Path 4
 - Enter the folder path of the documents to send to CloseSimple `[[FolderName\FolderPath]]`
 - Folder Path 5
 - Enter the folder path of the documents to send to CloseSimple `[[FolderName\FolderPath]]`
 - Notes
 - Enter Note to send to CloseSimple
 - Notes Source
 - Dropdown
 - Text Field
 - Text Note
 - 360 Field Code
 - ProForm Field code
-

- Custom Field
 - ProForm Custom Field code
 - Password
 - Enter user password for CloseSimple
 - UserName
 - Enter UserName for CloseSimple

Accept Automation

Complete and select all the necessary information presented on the Perform a 360 Action screen. For help, please contact automation@SoftProcorp.com.



General Information

- Service
 - CloseSimple – The Pizza Tracker for Title
 - This cannot be changed
- Service Action
 - Accept Documents

Service Action Settings

- Document Match 1
 - Dropdown
 - Actual Match
 - Documents with the exact name will be saved to ProForm Attachments from CloseSimple
 - Partial Match
 - Documents with the partial name will be saved to ProForm Attachments from CloseSimple
- Document Name 1
 - Enter the document name returned from CloseSimple to save to ProForm Attachments
- Folder Path 1
 - Enter the folder path to save the documents from CloseSimple [[foldername\foldername]]
- Document Match 2
 - Dropdown
 - Actual Match
 - Documents with the exact name will be saved to ProForm Attachments from CloseSimple
 - Partial Match

- Documents with the partial name will be saved to ProForm Attachments from CloseSimple
- Document Name 2
 - Enter the document name returned from CloseSimple to save to ProForm Attachments
- Folder Path 2
 - Enter the folder path to save the documents from CloseSimple [[foldername\foldername]]
- Document Match 3
 - Dropdown
 - Actual Match
 - Documents with the exact name will be saved to ProForm Attachments from CloseSimple
 - Partial Match
 - Documents with the partial name will be saved to ProForm Attachments from CloseSimple
- Document Name 3
 - Enter the document name returned from CloseSimple to save to ProForm Attachments
- Folder Path 3
 - Enter the folder path to save the documents from CloseSimple [[foldername\foldername]]
- Document Match 4
 - Dropdown
 - Actual Match
 - Documents with the exact name will be saved to ProForm Attachments from CloseSimple
 - Partial Match
 - Documents with the partial name will be saved to ProForm Attachments from CloseSimple
- Document Name 4
 - Enter the document name returned from CloseSimple to save to ProForm Attachments
- Folder Path 4
 - Enter the folder path to save the documents from CloseSimple [[foldername\foldername]]
- Document Match 5
 - Dropdown
 - Actual Match
 - Documents with the exact name will be saved to ProForm Attachments from CloseSimple
 - Partial Match
 - Documents with the partial name will be saved to ProForm Attachments from CloseSimple
- Document Name 5
 - Enter the document name returned from CloseSimple to save to ProForm Attachments
- Folder Path 5
 - Enter the folder path to save the documents from CloseSimple [[foldername\foldername]]
- Accept Documents
 - Dropdown
 - Accept Documents
 - This will accept document into the order.

Automation – Special Characters in Document Name

During **Automation**, a user may want to include a document that contains a naming convention that includes alphanumeric, spaces, dashes, underscores or period/dot. The Automation Process will remove the special characters in the naming convention of the document and allow the automation process to run successfully.

In the past, a user would not know of the failure unless they had access to SPAdmin to view the automation monitoring.

Here are the characters that have been identified that will be removed by automation:

Character	Example
Parenthesis	()
Comma	,
Apostrophe	'
Tilde	~
Question Mark	?
Explanation Mark	!
Semi Colon	;
Colon	:
Forward Slash	/
Ampersand	&
Pound	#
Address Sign	@
Percent	%
Dollar	\$
Asterisk	*
Plus	+
Equal	=
Carrot	^
Brackets	{ }
Square Brackets	[]
Vertical Bar	
Less than	<
Greater than	>