

# **CloseSimple User Guide**

600

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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.

CloseSimple - 2018120001	X
Welcome	CLOSE Simple
Welcome to CloseSimple! We hel	Ip you stand out during the Closing Process.
Send personalized Text Message Tracker for Title ™ to help drive yt (saving 60-90 minutes per file).	35, Automated Email Updates, & our Pizza our business forward and save you time
CloseSimple	
1500, Eastman Avenue, Dallas,	
TX 63541	
Closesimple.com	
Skip Welcome Page	Next Cancel

## 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.

oseSimple - 2019010001		
Submit	CLOSES The Pizza Tra	
Next milestone: Final Closing Checklist		
Documents:		
Name	Size	Browse
k Invoice	0.08 MB	Attachments
		Rename
		Delete
Notes:	Add to ProForm Notes	
This is a test description	^	
	~	
	Back Subr	nit Cancel

- **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.

Groups	💿 D	ata				
Al		Name	Current Value	New Value		
- Buyers - Sellers		Buyer 1 IndivOrOrg		Individual		
Contacts		Buyer 1 Address1		3448 lle De FRA	ANCE St	
		Buyer 1 Address2		Fort Wainwrigh	# 40	
		Buyer 1 City		Alaska		
		Buyer 1 State		AK		1
_						
View Cop	y File Nam	e		File Size(KB)	Transferre	bd
View Cop	y File Nam Other_bu	ie yer_NEWBuyer_Infor	nation_Shee.pdf	File Size(KB) 71.64	Transferre 100%	ed
View Cop	y File Nam Other_bu	ie yer_NEWBuyer_Infon	nation_Shee.pdf	File Size(KB) 71.64	Transferre 100%	n Not
View Cop	y File Nam Other_bu	ie yer_NEWBuyer_Infon	nation_Shee.pdf	File Size(KB) 71.54	Transferre 100%	n Not
View Cop	y File Nam Other_bu	ie yer_NEWBuyer_Infon	nation_Shee.pdf Value CloseSimple_Internst	File Size(KB) 71.54	Transferre 100%	n Not
View Cop View Cop Notes Sr.No	y File Nam Other_bu	ie yer_NEWBuyer_Infon	nation_Shee pdf Value Close Simple_Interm Close Simple_Interm	File Size(KB) 71.54 Zahar Add ediary bank is required fi ediary ABA routing numb	Transferre 100%	n Not
View Cop Notes Sr.No Sr.No Sr.No	y File Nam Other_bu	ie yer_NEWBuyer_Infon	Value CloseSmple_Interms CloseSmple_JPMon	File Size(KB) 71.64	Transferre 100% To ProForm or this wire tr ber nal Associati	n Not ransfe

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.

0000	0000				
	ouzo				
i 💼 🔂 1	itle				
- 🔁 L	oan Documents				
🔛 E	vidence for Paymen	nts Handled in Esc	row		
- 🔚 S	tate and Federal Ta	x Documentation			
🕒 🔁 🤇	pen Order				
	ransmittais				
<u>-</u>	liscellaneous				

E Groups	🔘 C	)ata				
Al		Name	Current Value	New Value		
Buyers Sellers Contacts		Buyer 1 IndivOrOrg		Individual	Individual	
		Buyer 1 Address1		3448 lle De FRA	ANCE St	
		Buyer 1 Address2		Fort Wainwrigh	rt 40	
		Buyer 1 City		Alaska		
		Buyer 1 State		AK		
Documents	py File Nar Other_bi	ne uyer_NEWBuyer_Inforr	nation_Shee.pdf	File Size(KB) 71.64	Transfer 100%	red
Documents     View Cc     E	py File Nar Other_b	ne .nyer_NEWBuyer_Inforr	nation_Shee.pdf	File Size(KB) 71.64	Transfer 100%	red
Documents View Cc	py File Nar	ne Jyger_NEWBuyer_Inforr	nation_Shee.pdf	File Size(KB) 71.64	Transfer 100%	red 'm Noti
Documents     View Cc     Cc     Notes     Sr.No	py File Nar Other_bi	ne NEWBuyer_Inforr	nation_Shee pdf	File Size(KB) 71.64	Transfer 100%	red
Occuments     View Cc     View Cc     View Cc     Notes     Notes	py File Nar Other_bi	ne .yver_NEWBuyer_Infor	Nation_Shee.pdf Value CloseSimple_Internx	File Size(KB) 71.64	Transfer 100% To ProFor	red rm Noti
View Cc     Sr.No	py File Nar Other_br	ne .yer_NEWBuyer_Infon	Value Close Simple_Interm Close Simple_Interm	File Size(KB) 71.64 Z Add adary bank is required fi edary ABA routing numb	Transferr 100%	red rm Note

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.

Que	ue					
0	Next Step 🔘 🕻	🗟 🗐 🛛 Views: 🕅 Transacti	ons	- 🚖 😺 🗔	Filter: All Providers	- = II 😅
	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
	Change Cincilla	The Direct Tendent for Tide	1- 0	2010110001	0.6.4	Course .

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

Tools							
Create Order Order Search	Order ID SmartVlew ~ 98481937						
Document Metadata Document Download	B- 98481937	Name	Description	Туре	Size		Folder
Document Upload	- Accounting	Close Simple Tracker Output pdf		ACCOUNTING	41.13 KB	View	Accounting
Sopporer	State and Federal Tax Documents     Open Order     Transmittals     Tele Documents     Loan Documents     Signature Shivets						

### **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		^	Do
	Service	CloseSimple - The Pizza Tracker for		Do
	Service Action	Submit Order		Do
~	Service Action Settings			Do
	Add To Proform Notes	Yes		Do
	AutomationCode			Do
	Document Name			Do
	Document Name 10			Do
	Document Name 2			Do
	Document Name 3			Fol
	Document Name 4			Fol
	Document Name 5			Fol
	Document Name 6			Fol
	Document Name 7			Fol
	Document Name 8			No
	Document Name 9			No
	Document Search	Partial Match		Pa
	Folder Path 1		×	Us
Pa	ssword			Add T
	anuard for Close simple			[Vool

#### **General Information**

- Service
  - CloseSimple The Pizza Tracker for Title
- Service Action
  - o 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
  - o Enter the name to retrieve the matching documents
- Document Name 10
  - Enter the name to retrieve the matching documents
- Document Name 2
  - o Enter the name to retrieve the matching documents
- Document Name 3
  - $\circ$   $\quad$  Enter the name to retrieve the matching documents
- Document Name 4
  - o Enter the name to retrieve the matching documents
- Document Name 5
  - o Enter the name to retrieve the matching documents
- Document Name 6
  - o Enter the name to retrieve the matching documents
- Document Name 7
  - Enter the name to retrieve the matching documents
- Document Name 8
  - o 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]]
- Ente
  Folder Path 4
  - o Enter the folder path of the documents to send to CloseSimple [[FolderName\FolderPath]]
- Folder Path 5
  - o 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**.

		A	Service Action	Accent Documents	
Service	CloseSimple - The Pizza Tracker for Title	e	Service Action Settings		
Service Action	Accept Documents		1.Document Match	Partial Match	
Service Action Settings			1.Document Name		
1.Document Match	Partial Match		1.Folder Path		
1.Document Name			2.Document Match	Partial Match	
1.Folder Path			2.Document Name		
2.Document Match	Partial Match		2.Folder Path		
2.Document Name			3.Document Match	Partial Match	
2.Folder Path			3.Document Name		
3.Document Match	Partial Match		3.Folder Path		
3.Document Name			4.Document Match	Partial Match	
3.Folder Path			4.Document Name		
4.Document Match	Partial Match		4.Folder Path		
4.Document Name			5.Document Match	Partial Match	
4.Folder Path			5.Document Name		
5.Document Match	Partial Match		5.Folder Path		
5.Document Name		~	Accept Documents	Accept Documents	

#### **General Information**

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

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#### Service Action Settings

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- 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
  - o Dropdown
    - Actual Match

Partial Match

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• Documents with the exact name will be saved to ProForm Attachments from CloseSimple

Documents with the partial name will be saved to ProForm Attachments from CloseSimple

- Document Name 3
  - o 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

0

- 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
  - o 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
    - o 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	1
Tilde	~
Question Mark	?
Explanation Mark	!
Semi Colon	;
Colon	:
Forward Slash	/
Ampersand	&
Pound	#
Address Sign	@
Percent	%
Dollar	\$
Asterisk	*
Plus	+
Equal	=
Carrot	٨
Brackets	{}
Square Brackets	[]
Vertical Bar	
Less than	<
Greater than	>