

# ClosingCorp User Guide

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## History

Date	Details
07/2020	Initial Draft
10/2023	Enhancements

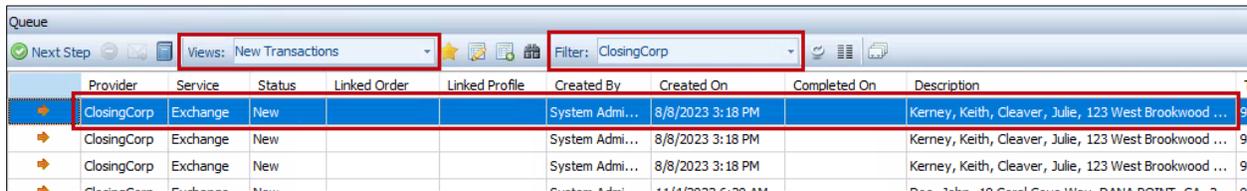
## Introduction

The SoftPro 360 integration with ClosingCorp provides the ability to receive Title and Escrow order requests from, and send information and documents back to, ClosingCorp customers. In addition to accepting order requests, a new order can be created with data seamlessly flowing into ProForm increasing productivity, efficiency and removing data re-entry.

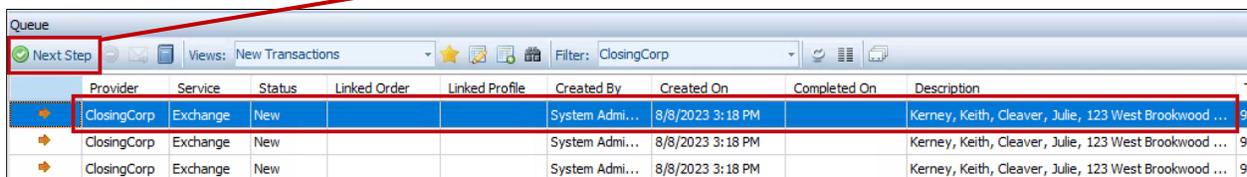
The vendor does not exist in the list of services menu and can only be accessed in the 360 Queue once an order is received.

## Accessing New Orders in the SoftPro 360 Queue

New orders sent from ClosingCorp appear as a single transaction in the SoftPro **360 Queue** when your **View** is set to **New Transactions** and **Filter** set to **ClosingCorp**. The **Service** column reflects **ClosingCorp**, **Status** column shows the order as **New** and the **Description** column indicates the Borrower’s Name and Property Address.

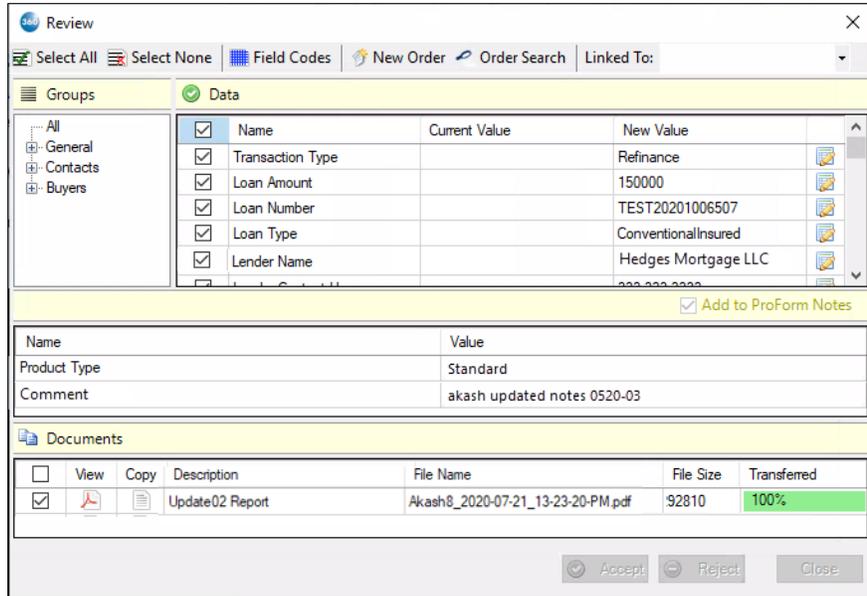


To review a new transaction, highlight the transaction, then click the **Next Step** button on the toolbar. This opens the **Review** screen.

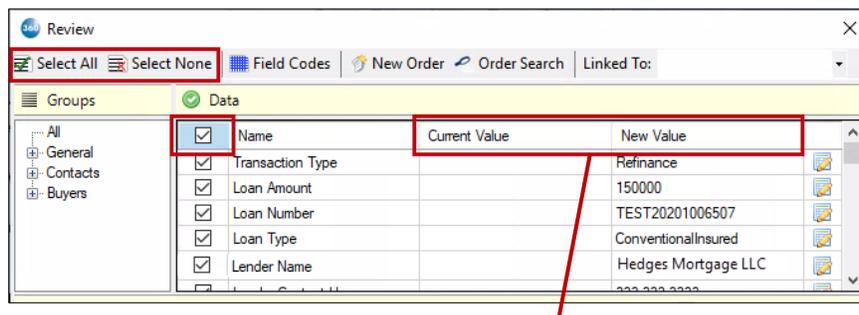


The **Review** screen displays all the data, notes, and documents sent from ClosingCorp to SoftPro 360.

The data should be reviewed carefully before acceptance.



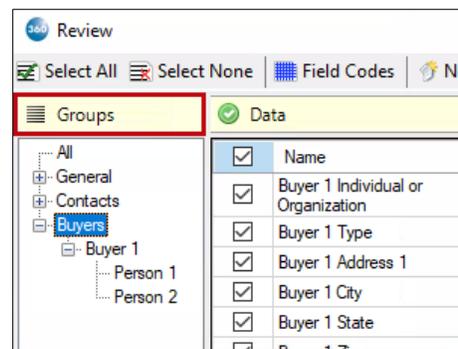
All data with a checkmark in the check box in front of the data field name will be accepted into a ProForm order. The check box in the header row (**Name, Current Value** and **New Value**), when checked, checks all fields below; if unchecked, all fields below are unchecked. By default all check boxes are checked. The **Select All** and **Select None** buttons, in the toolbar, have the same affect.



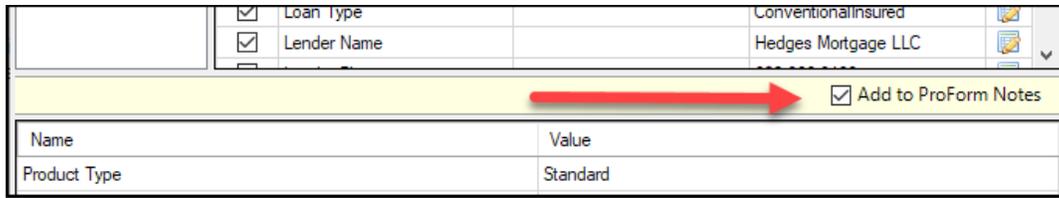
The incoming data sent from ClosingCorp is displayed in the **New Value** column. The **Current Value** column displays data that is currently in the order if the transaction has already been linked to an order.

The incoming values are also broken down into **Groups**. The **Groups** are listed in a tree-view on the left side of the screen.

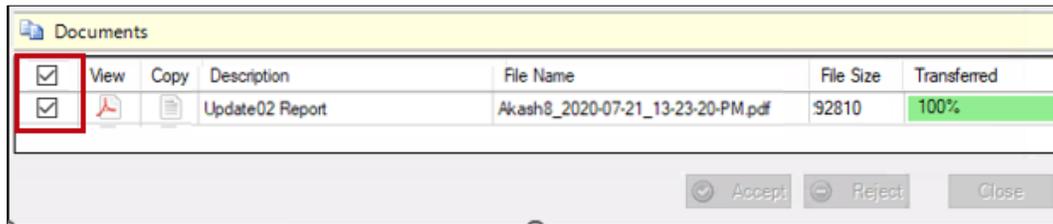
A specific **Group**, such as **Buyers**, can be expanded (by clicking on it) so that only the new incoming values for that group are viewed. The default **Group** selection is **All**, which shows all of the data being presented for the order.



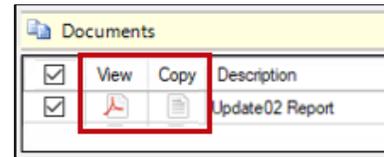
If the new order has any notes or comments attached, the **Add To ProForm Notes** will be checked by default and the information will be added to the **Notes** section of the ProForm order.



If the new order has a document attached, the document appears in the bottom portion of the screen in the **Documents** section. By default, all documents are checked to include when importing the order. Documents are pushed to the **Attachments/Document History** for Select.



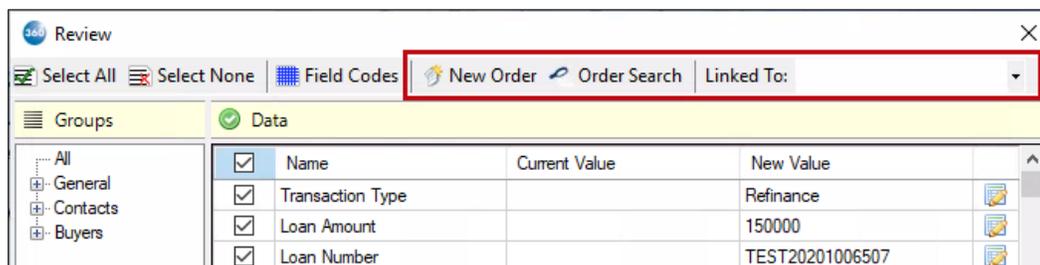
Documents can be viewed on screen by clicking the **PDF**  icon or click the **Copy**  icon to copy to the clipboard.



## Linking the Transaction to a ProForm Order

There are three options to accept the data into a ProForm order:

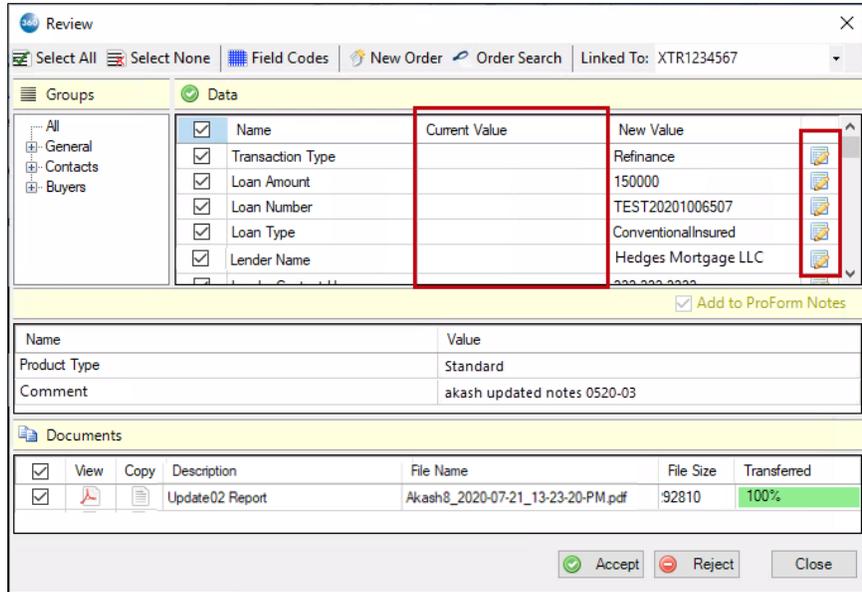
- Create a New Order - Click the **New Order** button to open the **ProForm New Order** dialog. Once the new order information (Prefix, Suffix, Order Number, Trust account and template) has been entered click **OK**. The new order number populates the **Linked To** field on the **Review** screen.
- Search for an Order - Click the **Order Search** button to open the **ProForm Order Search** screen. Highlight and double click the desired order number. The chosen order number populates the **Linked To** field on the **Review** screen.
- Link to an Opened Order - If the ProForm order that the data should be entered into is already open, click the **Linked To** drop-down and select the ProForm order number.



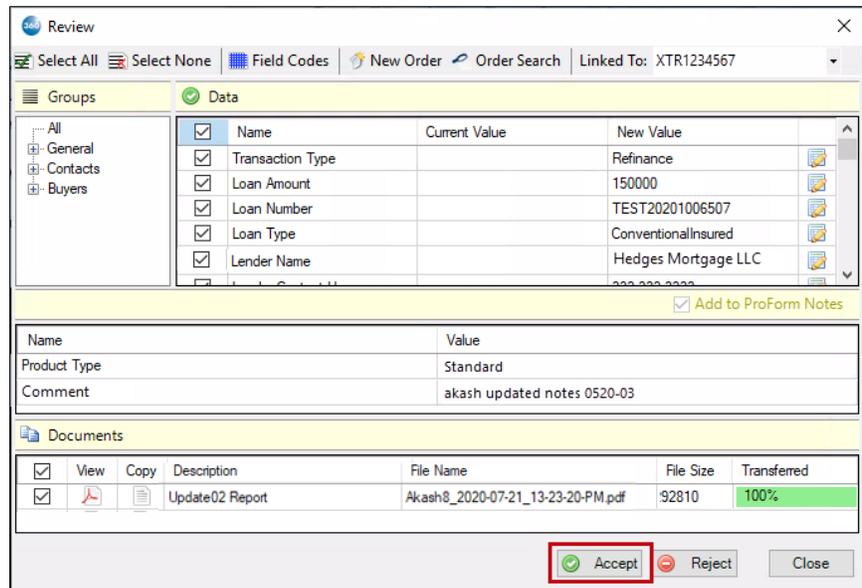
Once the ProForm order number has been selected and is displayed in the **Linked To** field, existing data populates in the **Current Value** column.

The user should review the **Current Value** and **New Value** entries before accepting the order.

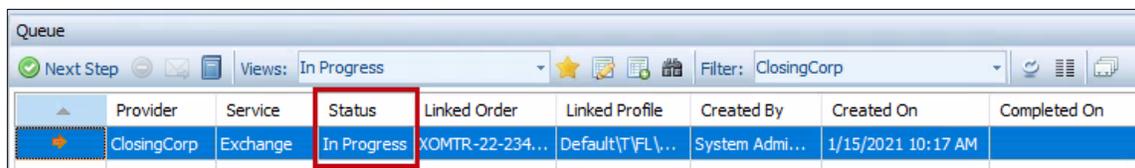
Should a change need to be made to a **New Value**, before acceptance, click the **Edit** icon to the right of each data line to open the **Edit New Value** screen.



After reviewing the data, and editing as needed, click the **Accept** button to pull the **New Value** data into the linked order.



Once accepted, the transaction status in the SoftPro 360 Queue updates to **In Progress**.

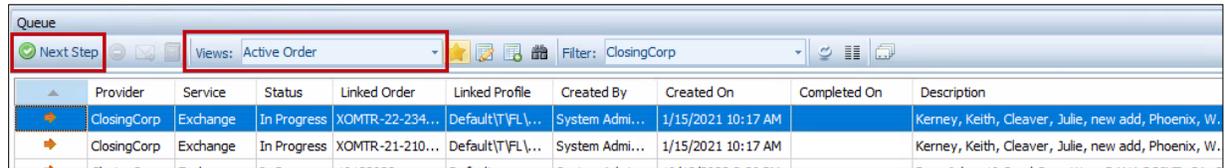


**NOTE:** The order can be rejected by clicking the **Reject** button. Transactions that are rejected will be displayed in the SoftPro 360 Queue as **Rejected** with no further action being available to the transaction. ClosingCorp and the lender are notified that the order was rejected.

## Updating a ClosingCorp Transaction

To access the **In Progress** transaction to send a communication, you can change the **View** in the **360 Queue** to **Active Order** (if the order is open on your desktop) or **In Progress** and highlight the order to be worked. To update the transaction, highlight it and click the **Next Step** button.

**NOTE:** An update can also be sent if the transaction status is **Accepted**.

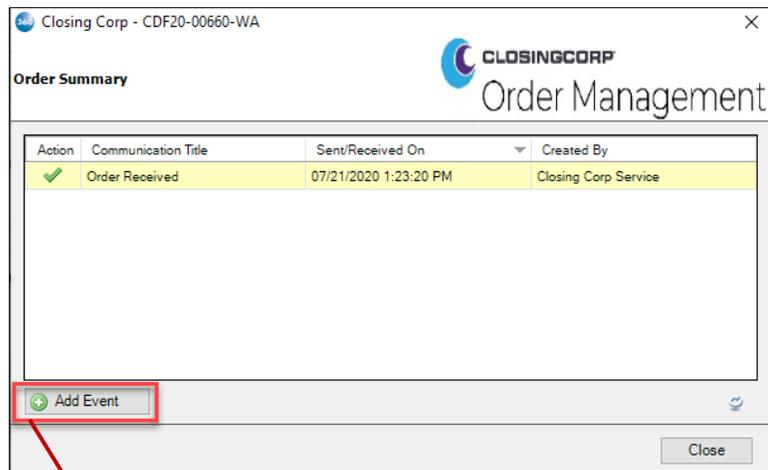


	Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On	Completed On	Description
	ClosingCorp	Exchange	In Progress	XOMTR-22-234...	Default(T\FL)...	System Admi...	1/15/2021 10:17 AM		Kerney, Keith, Cleaver, Julie, new add, Phoenix, W.
	ClosingCorp	Exchange	In Progress	XOMTR-21-210...	Default(T\FL)...	System Admi...	1/15/2021 10:17 AM		Kerney, Keith, Cleaver, Julie, new add, Phoenix, W.

The **Order Summary** screen is displayed. This screen shows all the events that have occurred for the transaction.

In our example, the receipt of the order is the sole event presented.

Click the **Add Event** button to open the **Select Event** window.



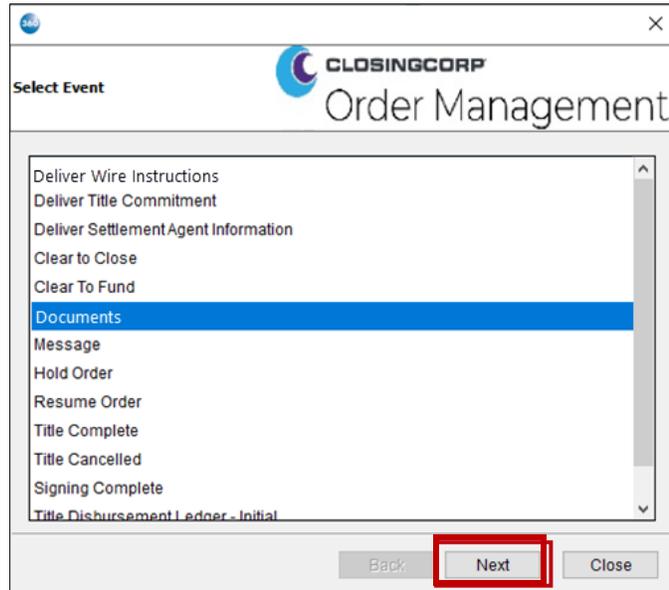
Action	Communication Title	Sent/Received On	Created By
✓	Order Received	07/21/2020 1:23:20 PM	Closing Corp Service

The full listing of events available for use is displayed on the **Select Event** screen.

Multiple events of the same type may be sent to ClosingCorp except for the **Title Complete** and **Title Cancelled** events.

The **Select Event** screen allows for event notifications or documents to be sent to the ClosingCorp user (lender). There is not an event that provides for the submission of a general comment.

Select the desired event to communicate to ClosingCorp and click the **Next** button.



Deliver Wire Instructions
Deliver Title Commitment
Deliver Settlement Agent Information
Clear to Close
Clear To Fund
Documents
Message
Hold Order
Resume Order
Title Complete
Title Cancelled
Signing Complete
Title Disbursement Ledger - Initial

## Documents Event

When the **Documents** event is selected, the **Event Information** screen opens with the event type indicated in the upper left of the screen.

From this screen you'll select the document you wish to send to ClosingCorp.

To select the document, click the,

- **Browse** button to navigate out to a folder location to select the document.
- **Attachment** button to select a document from the **Attachments & Document History** in Select
- **ReadyDoc** button to open and attach a ReadyDoc from the **ReadyDoc** tree.

The screenshot shows the 'Event Information' window in the ClosingCorp Order Management system. The window title is 'Event Information' and the logo is 'CLOSINGCORP Order Management'. The main area is divided into a 'Document' section and a 'Notes' section. The 'Document' section has a large empty text box. To the right of this box are five buttons: 'Browse', 'Attachment', 'ReadyDoc', 'Rename', and 'Delete'. The 'Document' label and the 'Browse', 'Attachment', and 'ReadyDoc' buttons are highlighted with red boxes. The 'Notes' section has a smaller empty text box. At the bottom of the window are three buttons: 'Back', 'Next', and 'Close'.

In this example, **Sample Document.pdf** was document selected to be sent to ClosingCorp.

The document name defaults to the filename of the document selected. The name can be modified by using the **Rename** button. If the wrong document was selected, use the **Delete** button to remove the document.

The column to the right of the document name is used to select the type of document being sent. Select the applicable document type from the drop-down. This is a required field as indicated by the red asterisk \*.

This screenshot shows the 'Event Information' window with a dropdown menu open for the document type selection. The 'Document' field now contains 'Sample Document.pdf'. The dropdown menu is open, showing a list of document types. The top two items, '1003' and '1003', are highlighted in blue. A red arrow points to the dropdown arrow, and a red asterisk is next to it. The 'Notes' field contains the text 'Additional Notes can be listed'. The 'Document' label and the 'Notes' field are highlighted with red boxes. The 'Document' field and the dropdown menu are also highlighted with red boxes. The 'Notes' field is highlighted with a red box. At the bottom of the window are three buttons: 'Next', 'Close', and 'Close'.

### Deliver Title Commitment Event

Selecting the **Deliver Title Commitment** event presents the same options for identifying and attaching the document when selecting the **Documents** event.

Once the commitment is attached, the document type defaults to **Commitment**. Clicking the **Next** button opens the **Event Information** screen.

The information should be reviewed, and any missing data should be completed, if needed. (Typically, this screen would be more fully completed than the sample shown here.)

Name	Value
Account Number	
Vesting	Keith Kerney and Julie Cleaver
Legal Description	
APN	
ABA	
Address	new add , Phoenix,WA 85040
Property Type	Single Family
Account Number	
Order Date	
Commitment Completed Date	
Report Effective Date	07/21/2020

Once the data is completed, click the **Submit** button to send the commitment and data to ClosingCorp.

### Deliver Settlement Agent Information Event

The **Deliver Settlement Agent Information** event opens the **Event Information** screen with the settlement agent information. Some or all of the information may be pre-populated but should be reviewed for accuracy before clicking the **Submit** button.

To enter or edit information, click in the corresponding field in the **Value** column, to enter the information.

Name	Value
Agent Name	Lauren DeNoia
Address	4800 Falls of Neuse
City	Raleigh
State	NC
Zip	27609
NMLS ID	
State License ID	57529572
Name	SoftPro Settlement Agency
Contact NMLS ID	
Contact State License ID	
Email	lauren.denoia@softprocorp.com

### *Deliver Wire Instructions Event*

The **Deliver Wire Instructions** event opens the Event Information screen where Contact Information can be chosen from Settlement Agent, Title Company, or Escrow Company Contacts.

The information for the first name listed populates in the **Value** fields but should be reviewed for accuracy before clicking on the **Submit** button.

To enter or edit information, click in the corresponding field in the **Value** column, to enter the information.

The screenshot shows the 'Event Information' window in the CLOSINGCORP Order Management system. The 'Deliver Wire Instructions' tab is active. The table below contains the following data:

Name	Value
Name	Smith Agent
Address	123 Main Street
City	Clinton Township
State	MI
Zip	48035
Contact Name	
Phone	(123)123-1234
Fax	
ABA Number	123131234
Account Number	392303920
For Credit To	Smith Agent

At the bottom of the window, there are three buttons: 'Back', 'Submit', and 'Close'. The 'Submit' button is highlighted with a red box.