ClosingCorp
User Guide (v2.0)

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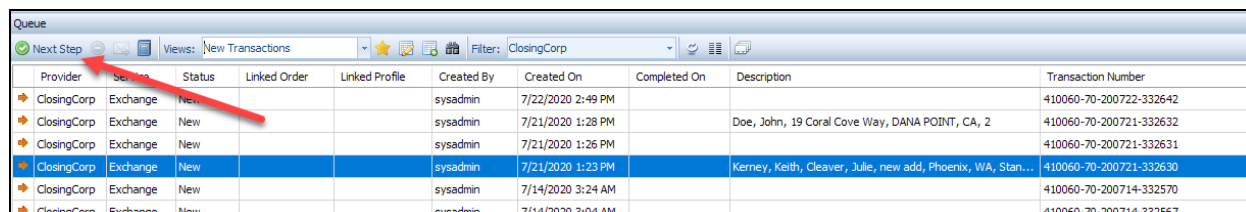# Copyright and Licensing Information

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Introduction

The SoftPro 360 integration with ClosingCorp provides the ability to receive Title and Escrow order requests from, and to 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
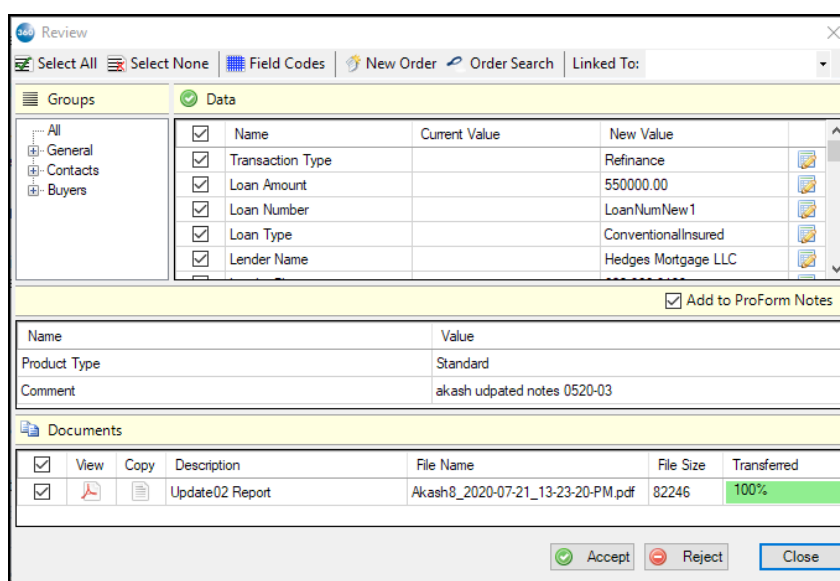
New orders sent from ClosingCorp will appear in the SoftPro 360 queue under the 'New Transactions' 'View' as a single transaction. The Service column will reflect 'ClosingCorp', and the 'Status' column will reflect 'New'. The 'Description' column will indicate the Borrower's Name and Property Address.

To review a new transaction, highlight the transaction, then click the 🟢Next Step button at the top left of the Queue toolbar. The 'Review" screen (sample shown below) will be presented.

The 'Review' screen will display 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. By default all check boxes are checked. The incoming data sent from ClosingCorp will be displayed under 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 check box in front of the 'Name' column header will, if checked, check all fields in the listing; if unchecked, all fields below will be unchecked. The 'Select All' and 'Select None' buttons, at the top of the screen, under the 'Review' banner, have the same affect.

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 will present 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 to it, an indication to that effect will appear at the bottom portion of the screen. To view a document, click the 'PDF' icon in the 'View' column. To copy a document to the clip board, click the 'Copy' icon in the 'Copy' column. The document(s) will be pushed to the Attachments/Document History for Select.
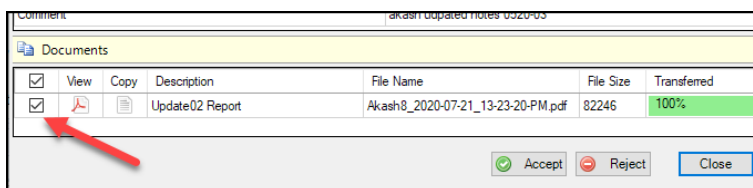
Linking the Transaction to a ProForm Order

There are three options to attach the data into a ProForm order: Create a New Order, Search for an order, or Linking To an order that is currently opened in ProForm.

- Click the 'New Order' button to open the 'ProForm New Order' screen. Once the New Order information (Prefix, Suffix, Order Number, Trust account and template) has been entered click 'OK'. Clicking 'OK' will place the new order number into the 'Linked To' field on the 'Review' screen.
- Click the 'Order Search' button to open the 'ProForm Order Search' screen. Highlight and double click the desired order number. The chosen order number will be placed into the 'Linked To' field on the 'Review' screen.
- 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.
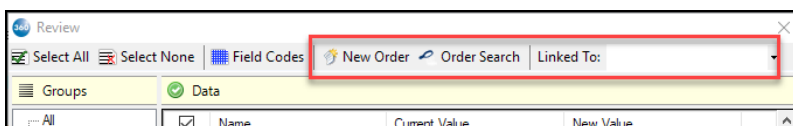
Once the ProForm order number has been selected and is displayed in the 'Linked To' field of the Review screen, the user will see any existing data presented in the 'Current Value' column. The user should review the 'Current Value' and 'New Value' entries before accepting the order. Should a change need to be made to a 'New Value', before acceptance, the 'Edit' icon to the right of each data line can be clicked to open up the 'Edit New Value' screen.
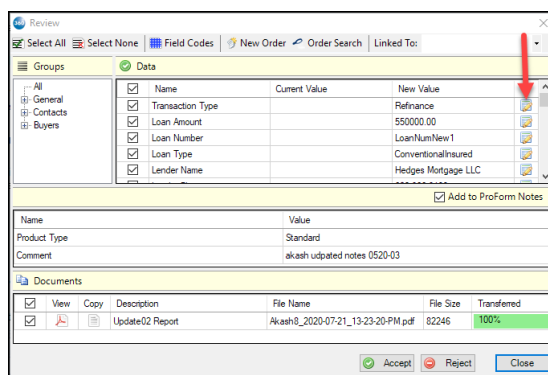
After reviewing the data, and editing as needed, the user can click on the ' ✅ Accept' button, at the bottom of the screen, to pull the 'New Value' data into the linked order. Once accepted, the transaction status in SoftPro 360 will update to 'In Progress'.

NOTE: The order can be rejected by clicking the ' ⛔ Reject' button at the bottom of the 'Review' screen. 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 will be notified that the order was rejected.

Updating a ClosingCorp Transaction

To access the 'In Progress' transaction to send a communication, change the SoftPro queue 'View' 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:

You can also send an update if the transaction is in an 'Accepted' status.

The 'Order Summary' screen will be displayed. This screen will show all the events that have occurred for the transaction. In the screen shot below, the receipt of the order is the sole event presented.
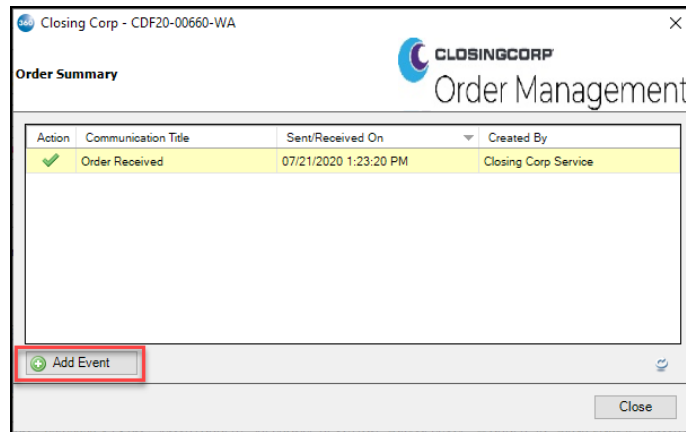
Click the 'Add Event' button to open the 'Select Event' screen (shown below). The full listing of events available for use is displayed here. Multiple events of the same type may be sent to ClosingCorp – except for the 'Title Complete' and 'Title Cancelled' events.
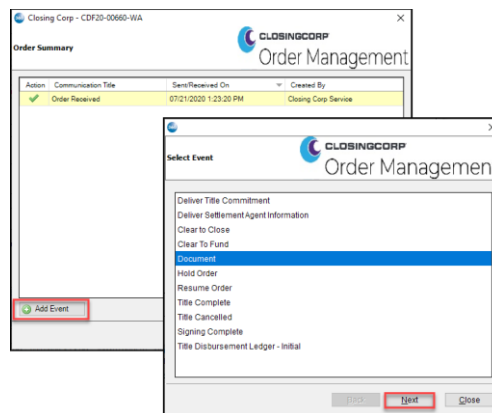
The 'Select Event' screen allows for event notifications or documents to be sent to the ClosingCorp user (lender). There is not an event that provides for the submission of a general comment. Select the desired event to communicate to ClosingCorp and click on the 'Next' button.

A sample 'Document' event is detailed here. The user would select the 'Document' event on the 'Select Event' screen and click on 'Next'. The 'Event Information' screen will then be presented, with the event type indicated in the upper left of the screen – in this instance 'Document' was the event selected.
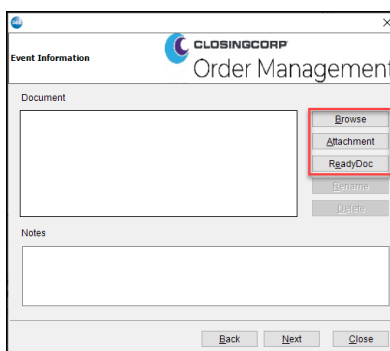
Click the 'Browse' button to browse out a file/folder location; click 'Attachment' to attach a document from Attachments & Document History in Select; or, click the 'ReadyDoc' button to open and attach a ReadyDoc from the ReadyDocs tree.

In the sample below, 'Sample Document' was selected to be sent to ClosingCorp. The column to the right of the name is used to select the type of document being sent. By clicking on the down arrow the user is presented a list of document types, from which the appropriate selection should be made. This is a required field, as indicated by the red asterisk.

The document description will default to the name of the communication selected but can be modified – by clicking on the 'Rename' button. If the wrong document was selected, it can be removed by clicking on the 'Delete' button.

The 'Deliver Title Commitment' event is similar to the 'Document' event, in that the same options for identifying and attaching the document are presented. Once the user has attached the commitment, the document type will be defaulted as 'Commitment'. When the user clicks on 'Next', the 'Event Information' screen is presented. Typically, this screen would be more fully completed than the sample shown here. The information should be reviewed and any missing data should be completed if it is needed. Once the data is completed, the user would click on the 'Submit' button to send the commitment and data to ClosingCorp.

The 'Deliver Settlement Agent Information' event brings up a screen into which information about the settlement agent is entered – some or all of information may be pre-populated, but should be reviewed for accuracy before clicking on the 'Submit' button. To enter or edit information in the 'Value' column, simply click on the field to be entered/edited and type in the value.

NOTE:

This product will allow you to send and receive communications from ClosingCorp until you send a 'Title Complete' or 'Title Canceled' event.

The 'Title Complete' event will send that notice to ClosingCorp and no further communications can be sent on the order. The order will reflect a 'Status' of 'Completed' in the 360 Queue.

The 'Title Cancelled' event will send that notice to ClosingCorp and *no further communications can be sent* on the order. The order will reflect a 'Status' of 'Rejected' in the 360 Queue.