

ClosingLock User Guide

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Introduction

The SoftPro 360-ClosingLock integration provides SoftPro 360 users the ability to place orders for instant payoff verification, request wire transfer instructions, send wire transfer instructions, send documents for notification and eSignatures, and review existing ClosingLock orders. ClosingLock manages the designation of the active order, selection of escrow accounts and tagging of signature fields within the ClosingLock website

Accessing

From the Select toolbar:

- 1. Select the Services tab
- 2. Click the Settlement Services folder to expand
- 3. Double-click ClosingLock – Wire **Fraud Protection**

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Services	Administration		in the
Submit About	Login	Santas Submit About	
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- ClosingLock - Wire Fraud	Add-Ins	 CC effective D'S effective 	E- L Add-Ins
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- FAPRES - TrustLink Acco	QA	 Safe CDFWSR0 KK, Bent Safe Let 	EC Purchasing - Purchasing Discounts
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 Safe Escrow - Disburseme SafePay - CDE MISMO XM 	Tax Services	🗢 😩 Tan Services	Bancserv - Signing Service
- SoftPro - Live	Title Services	Ditaflase Tar Serves	Closingliock - Wire Fraud Protection
 SoftPro Sign - eClose 	Underwriter Services	ALK Seven Tile Polution	EPN - eRecording
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		 FUTC - Bulk Peret FINF - ToleThane 	MeridianLink - MeridianLinkLauncher Simplifile - eRecording
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		 Same Proceeding Software Tenary Take Take Search 	Tax Services
		 The Rescure Drop - Me Septh Restor - The Septh 	DataTrace TaxSource - Tax Search
		KPG National Nov-Title Search Moderative Sectorizes	Title Services
		INTE - Apena National 21 Office - Apena National 21	NextAce - TitleEDGE
		CLTC Jake CFL/Tile Invited	Property Insight - TitlePoint
		 CATE Tax - Jacket CP5/Tile Seven Dires - Apertical 	PropLogix - Lien & HOA Search, Survey, Re
		 FATE - Apentitie Free Tailored - Preliate Areas Areas 	E Iools

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- The **Welcome** screen provides • information on the ClosingLock vendor.
- The Skip Welcome Screen check box will • prevents the Welcome screen from being shown in the future when opening ClosingLock.
- Click the **Cancel** button to exit the ClosingLock process or Next to launch the ClosingLock integration product.



 SoftPro - Sync Underwriter Services

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Logging into ClosingLock

- The **Remember Me** check box is automatically checked and the API key, once entered is cached for future visits.
- Click Login to enter to the ClosingLock Wire Fraud Prevention integration.



Branch Selection Screen

- Select the applicable Branch for this order. This is a required selection.
- Click the Cancel button to exit the ClosingLock process or Next to launch the Product Selection Screen.



Product Selection Screen

On the **Product Selection** screen choose from the following options,

- New Order If selected, one of the below sub product selections is required
 - o Send Wire Info
 - Request Wire Info
 - Send Documents
 - Client Notes is optional to send to ClosingLock with Send Wire Info, Request Wire Info, and Send Documents
- View Existing Order
- Instant Payoff Verification

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New Order * Send Wire Info Request Wire Info Send Documents		
Client Notes	^ v	
O View Existing Order		

Click Submit to submit your request to the ClosingLock website.

Note: Once the order information is submitted the ClosingLock website launches to finalize the submission.

New Order – Send Documents

If **Send Documents** is selected under **New Order**, click the **Next** button to launch the **Document Selection Screen**

At least one document is required to submit a new order to ClosingLock.



* At least one document is required

The **Document Selection** screen is used to select documents from the ProForm or Select Order to be sent to ClosingLock. The **Document Selection** screen offers the following functionality:

- Browse
 - The ability to browse to a location on a local computer or network to add a document.
- Attachments
 - The ability to attach a document from the ProForm Order.
 - ClosingLock cannot add documents with the Attachments option if the ProForm Order does not have any attachments. Documents must be added to the ProForm Order first.
 - The ability to attach a document from SmartView. This option is only available to FNF Direct Operations.
- Documents
 - The ability for Impact[©] users to select attachments using the **Documents** button. This option is only available to Impact[©] clients and will not display for users who are not Impact[©] users.
- Rename
 - \circ $\;$ The ability to rename a document once it has been added.
- Delete
 - The ability to delete an added document.

Rename

Delete

Submit Automation – New Order

Complete and select all the necessary information presented on the **Perform a 360 Action** screen.

- Branch Office
 - o Enter a Branch Office associated with the Service Provider
- Document Search
 - o Required for requests for Send Wire Info
 - Options
 - Actual Search
 - Partial Search
- Document 1
 - o Enter document name to retrieve from Attachments
- Document 2
 - Enter document name to retrieve from Attachments
- Document 3
 - Enter document name to retrieve from Attachments
- Document 4
 - o Enter document name to retrieve from Attachments
- Document 5

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- Enter document name to retrieve from Attachments
- eSignRequested 1
 - Options
 - True
 - False
- eSignRequested 2
 - Options
 - True
 - False
- eSignRequested 3
 - Options
 - True
 - False
 - eSignRequested 4
 - Options
 - True
 - False
- eSignRequested 5
 - Options
 - True
 - False
- Notes to Recipients
- Password
 - ClosingLock Password
- Recipients
- SmartView Folder
 - SmartView Document
- Subproduct

- o Required for requests for Send Wire Info
- Username
 - ClosingLock Username
- wireInfoID
 - o Required for requests for Send Wire Info