ClosingsLIVE - Guide to Administrative Screens

September 2023

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Getting Started

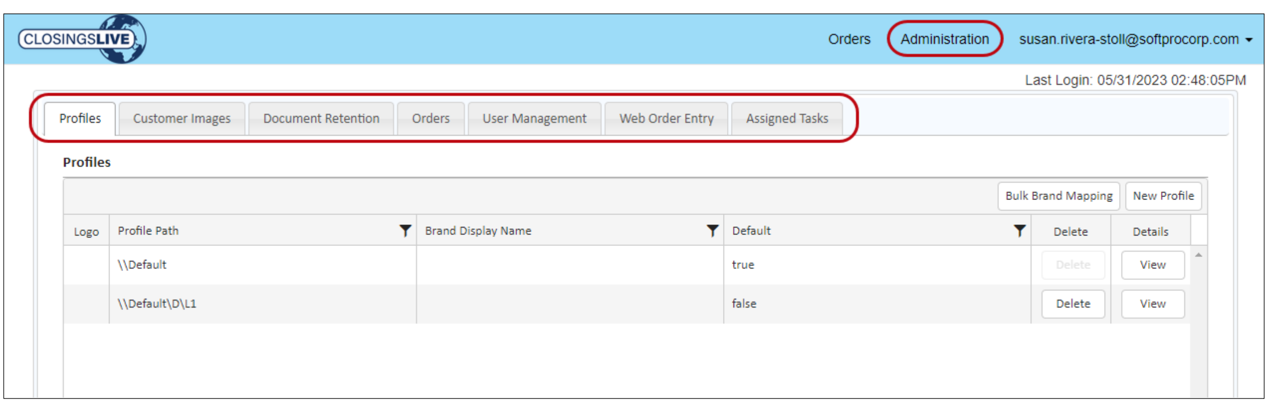
Once logged into ClosingsLIVE, to access the **Administration** menu, click the link in the toolbar (upper right).

There are two levels of permissions granted at the administrative level allowing access to specific administrative tabs within ClosingsLIVE.

- Customer Admin permission - If granted, all of the tabs listed below are accessible with the exception of the **User Management** tab.
- User Management permission, only the **User Management** tab is accessible. This permission allows the user to send invitations, enable/disable users, reset passwords and MFA.
- A user may have both the Customer Admin and the User Management permissions; this would be required to view all tabs. To grant this permission, please contact SoftPro Support.

The menu contains seven tabs:

- **Profiles** – Allows you to configure the Default profile, add additional profiles as needed and edit email templates.
- **Customer Images** – Allows you to upload any images used within email notifications.
- **Document Retention** – Allows you to set how long the document data is stored and create the message displayed once the document is removed.
- **Orders** – Provides the ability to remove a previously published order.
- **User Management** – Provides a list of all users, registered and invited, to use ClosingsLIVE. From this tab, a user's password can be reset, and users can be enabled or disabled, or invitations sent/resent to new users.
- **Web Order Entry** – Allows you to customize the web order form if using the web order entry option.
- **Assigned Tasks** – Allows you to customize and activate Tasks with associated form and the forms corresponding action (upload or online form).



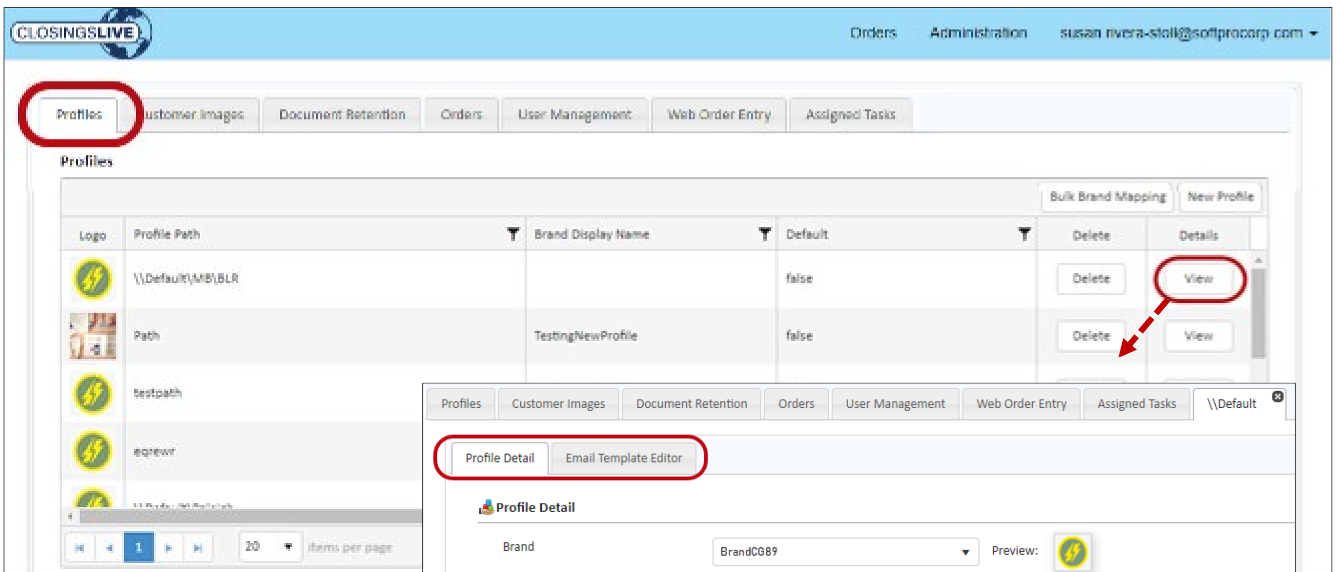
Any changes made on these tabs must be submitted using the **Submit Changes** button for the changes to take effect.

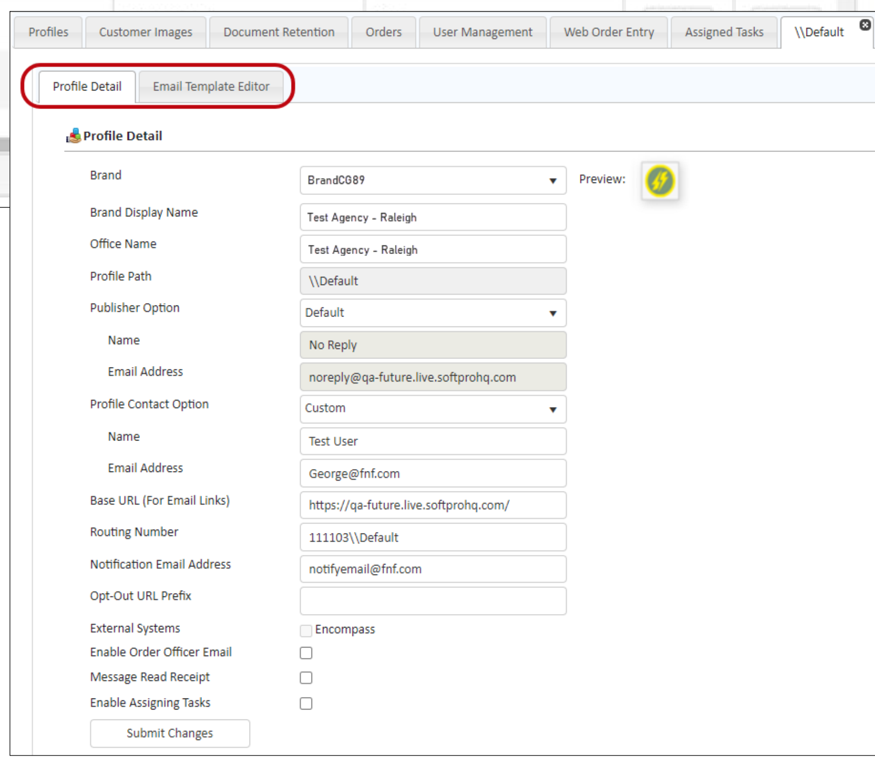
Profiles Tab

The **Profiles** tab shows the list of existing profiles and allows the administrator to create, edit or remove profiles, associate logos and the brand display name within ClosingsLIVE as well as edit email templates.

Typically, the **Default** profile is the only profile needed and cannot be deleted. With the **Default** profile, email notifications are established for the company. Additional profiles can be created at the operation or process level (i.e., order desk) to allow for additional email notifications (SoftPro Select customers only).

To view details of the profile or to access the email template editor, click the **View** button located in the **Details** column.



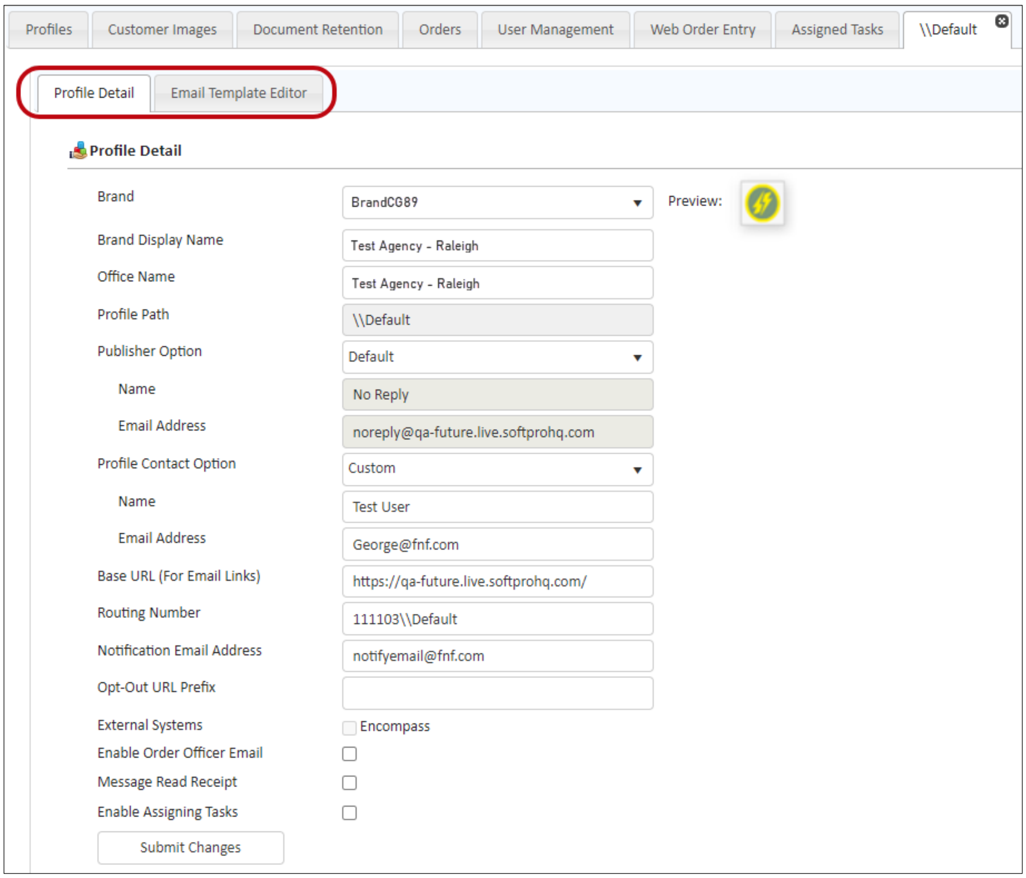


Two additional tabs are displayed: **Profile Detail** and **Email Template Editor**.

NOTE: If adding a new profile, the **Email Template Editor** tab does not become available until the profile information is submitted.

Profile Detail Tab

The **Profile Detail** tab allows the administrator to update existing profile information such as the brand name and logo, the name that appears on return emails (pulls from the **Return Email Name** field) or the return email address (e.g., noreply@lq1.softprohq.com).

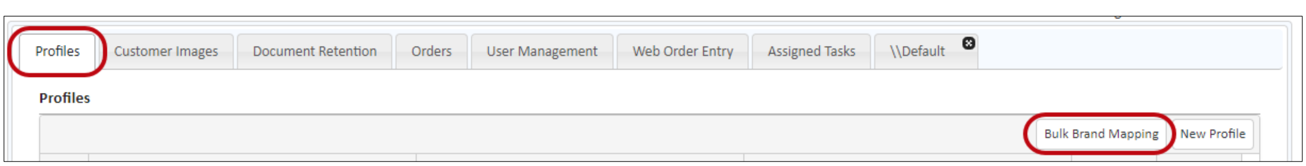


When creating a new profile, enter/select the,

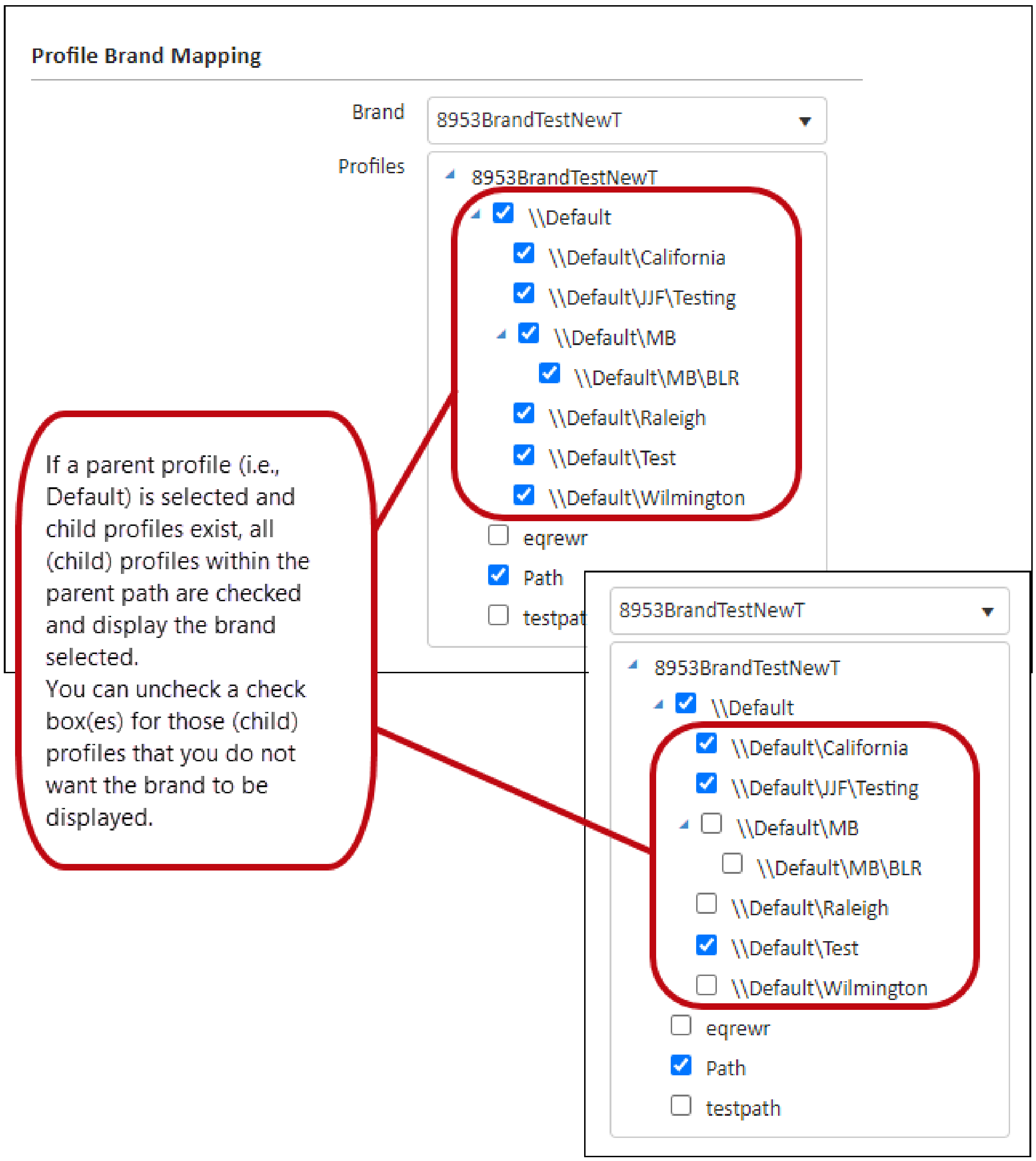
- **Brand** – this is the logo displayed when viewing the order details.
- **Brand Display Name** – this is the brand name displayed when viewing the order details.

NOTE: Brand and Brand Display name entries are set up by the System Administrator. If you wish to use the Branding feature, contact SoftPro Support. The brand can be assigned to multiple profiles at one time using the **Bulk Brand Mapping** tool.

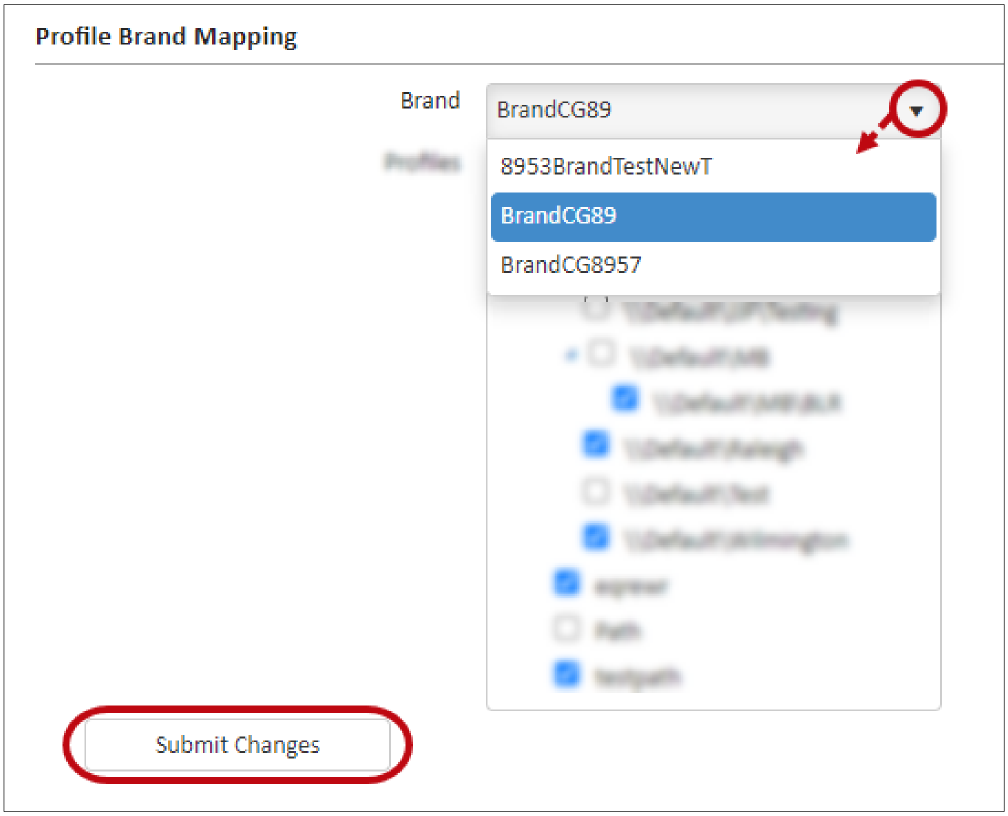
From the **Profiles** tab, click the **Bulk Brand Mapping** button to assign a selected Brand to all profiles or selected profiles or both across multiple parent profiles.



Checking the **Default** (parent) profile check box assigns the selected brand to all (child) profiles within the Default profile path. Check only specific profile check boxes for those you wish to assign the selected brand. The brand assignment can be different for each parent profile.



The brand assignment can be set for each brand when multiples exist.



Click the **Submit Changes** button to save your selections.

- **Office Name** – this name appears on the web order entry form
- ***Profile Path** – must include the Default path when adding additional profiles (e.g., **\\Default**\Raleigh)
- ***Return Email Name** – name appearing as the “From” on the email
- ***Return Email Address**
- ***From Email Address**

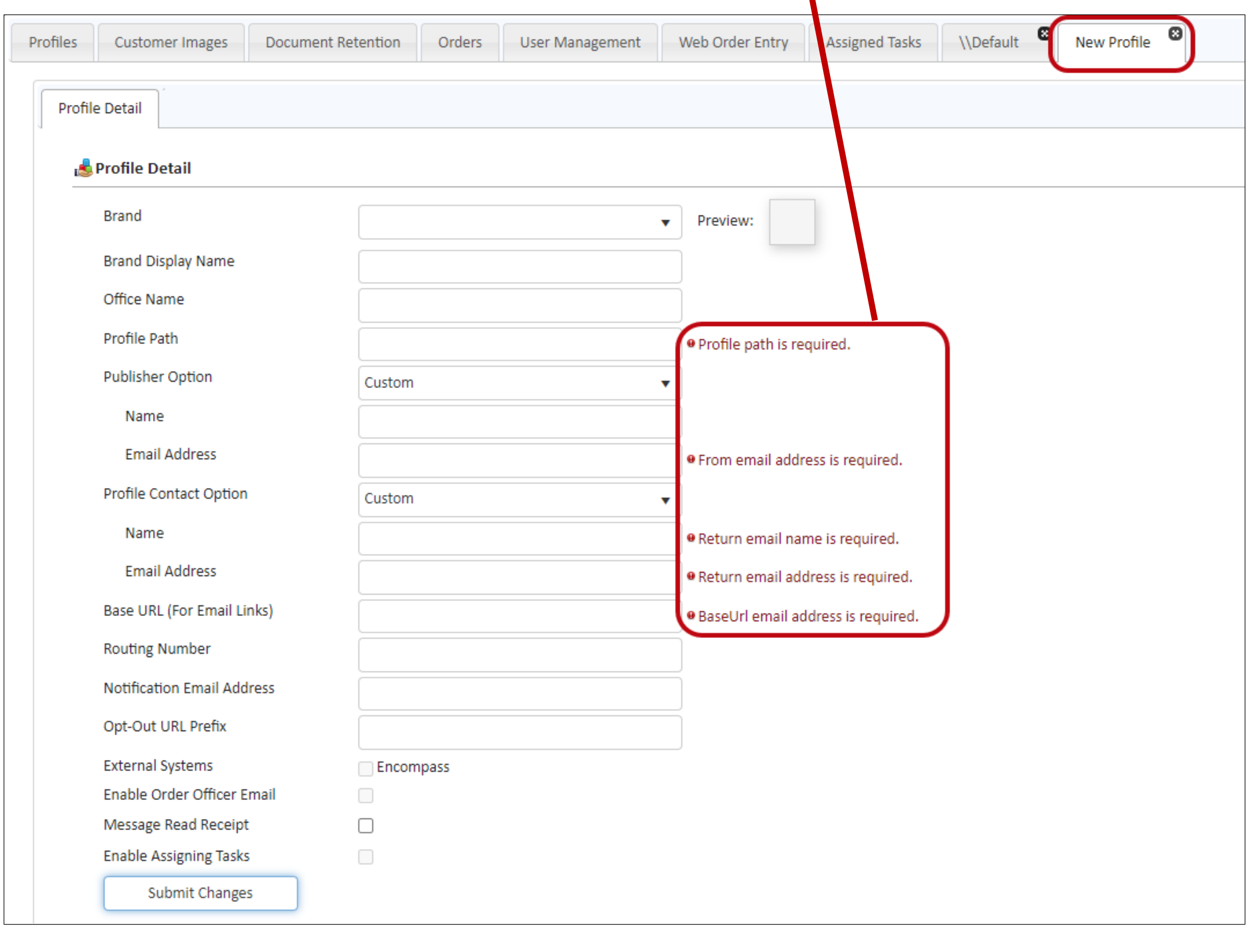
Email associated with sender on email notifications; recommend using *noreply@[yourdomain]*

Best Practice: Using ***noreply@[yourdomain]*** as the return email address is strongly encouraged. A “no reply” email address reinforces the use of communication via ClosingsLIVE.

- ***Base URL (For Email Links)** – this is your secure portal (i.e., *https://[your domain]*). The secure portal must be registered prior to using. Contact SoftPro if a new secure portal is to be used.

- **Routing Number** – your serial number with SoftPro and current profile (i.e., *serial number\\[profile name*]). This is required when using web order entry.
- **Notification Email Address** – email address of the office, distribution list, or individual to receive notifications for new orders placed and web message received; only one email address can be entered for the profile
- **Opt-Out URL Prefix** – URL for the landing page displayed when a user clicks the **Unsubscribe Link** in the email notifications (i.e., New Order email, Order Update email, etc.).
- **External Systems** – check only if using Encompass; contact SoftPro for additional information.
- **Message Read Receipt** – allows notifications to be sent to the office when a published message is read by the recipient. Requires setup at the system level. Contact SoftPro for initial setup. It can be set on additional profiles. If checked, a “read receipt” is generated in the form of a 360 Queue transaction that can be saved to the ProForm Order Notes.
- **Enable Assigning Tasks** – When both are checked, this allows permissions to be set at the task level to receive requests to upload documents and complete forms associated with the task. This check box is only enabled if the Enabled Assigned Tasks is enabled at the customer level.

NOTE: Required fields are denoted with an asterisk above and identified as such on the **Profile Detail** tab.

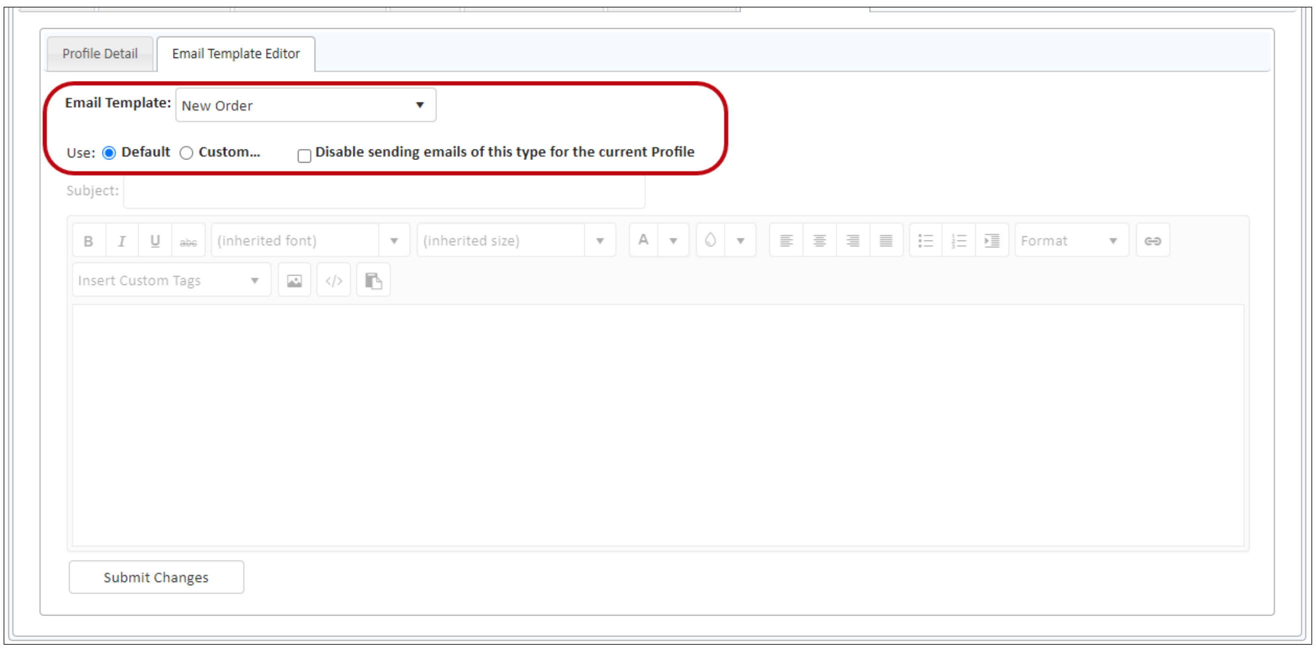


Once the data is entered, click the **Submit Changes** button to save the changes and continue. If adding a new profile, the **Email Template Editor** tab becomes available once submitted.

Email Template Editor Tab

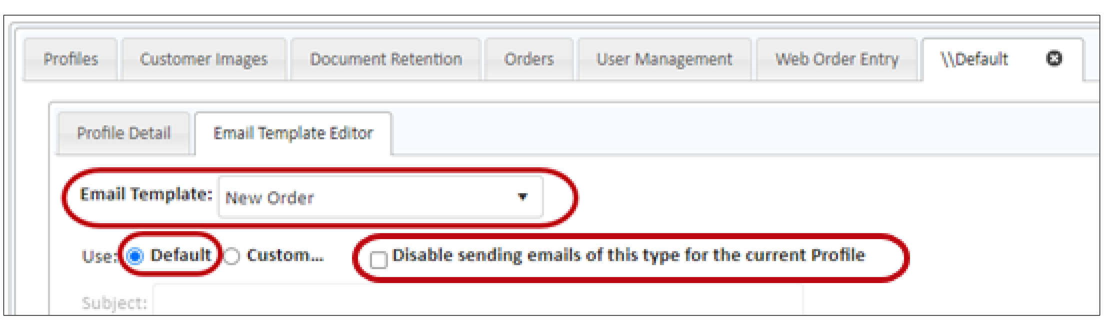
ClosingsLIVE provides default email notification templates. From this tab, a template is selected from the **Email Template** drop-down to use as the default, customize or disable for the current profile.

NOTE: Additional email templates cannot be created. Refer to the section ***Customizing Email Templates*** if you wish to make changes.



Using Default Email Templates

SoftPro provides default email templates that the administrator can utilize if they choose. A template is selected from the **Email Template** drop-down and is used “as is”, no wording changes needed to the subject line or body of the email.



All email templates have the **Disable sending emails of this type for the current Profile** unchecked by default (emails are sent), except the Order Closed email template which is checked by default (no emails are sent).

Some of the default email templates are,

- Invitation

You have been invited by {{CustomerName}} to join ClosingsLIVE

ClosingsLIVE is a web based tool that streamlines communications with your closing and title professionals, making the closing process faster, easier, and more cost effective.

By using ClosingsLIVE you will be able to:

- View all of your transactions conveniently in one locate
- Access specific transactions from an easy to navigate list
- Receive updates when activity happens on your order directly in your Inbox
- Review documents securely through the ClosingsLIVE web interface

Click Here To Sign Up

Click here to unsubscribe from these emails.

- New Order

Order #{{OrderNumber}} has been added to ClosingsLIVE

{{CustomerName}} added the following order to ClosingsLIVE:

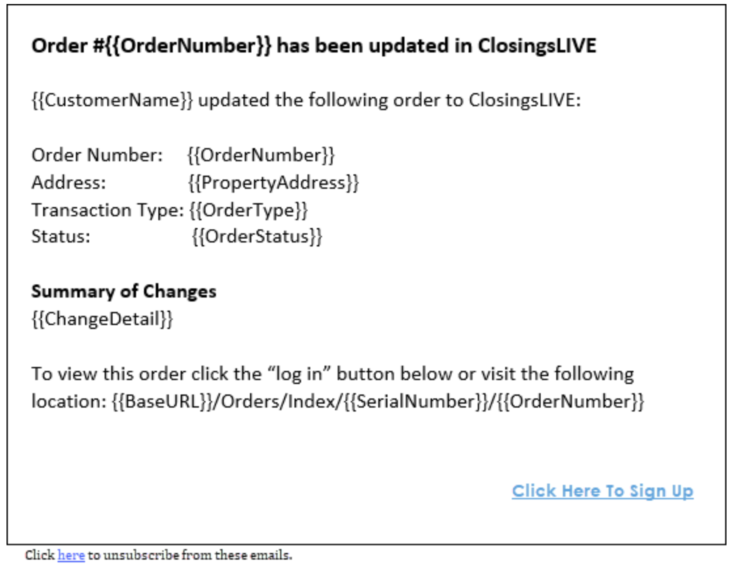
Order Number: {{OrderNumber}}
Address: {{PropertyAddress}}
Transaction Type: {{OrderType}}
Status: {{OrderStatus}}

To view this order click the "log in" button below or visit the following location: {{BaseURL}}/Orders/Index/{{SerialNumber}}/{{OrderNumber}}

Click Here To Sign Up

Click here to unsubscribe from these emails.

- Order Update



Order #{{OrderNumber}} has been updated in ClosingsLIVE

{{CustomerName}} updated the following order to ClosingsLIVE:

Order Number: {{OrderNumber}}
Address: {{PropertyAddress}}
Transaction Type: {{OrderType}}
Status: {{OrderStatus}}

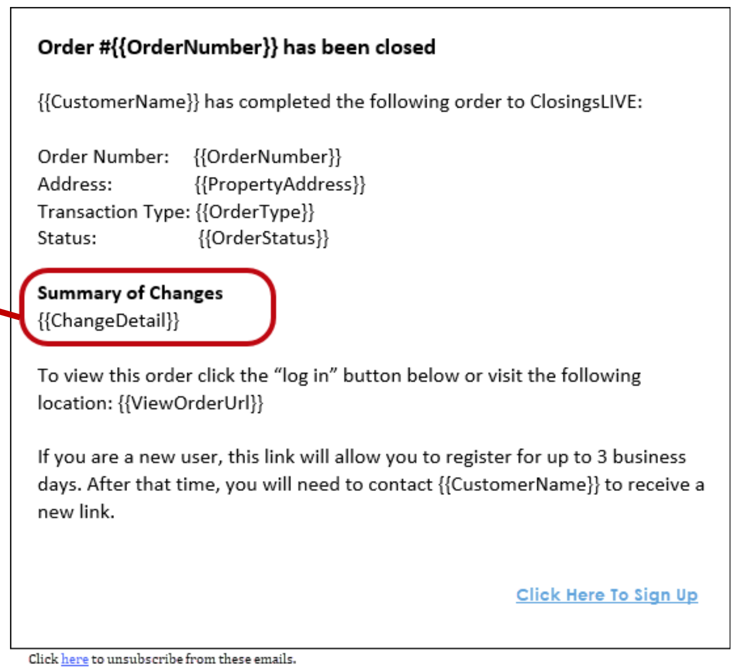
Summary of Changes
{{ChangeDetail}}

To view this order click the "log in" button below or visit the following location: {{BaseURL}}/Orders/Index/{{SerialNumber}}/{{OrderNumber}}

Click Here To Sign Up

Click here to unsubscribe from these emails.

- Order Closed



Order #{{OrderNumber}} has been closed

{{CustomerName}} has completed the following order to ClosingsLIVE:

Order Number: {{OrderNumber}}
Address: {{PropertyAddress}}
Transaction Type: {{OrderType}}
Status: {{OrderStatus}}

Summary of Changes
{{ChangeDetail}}

To view this order click the "log in" button below or visit the following location: {{ViewOrderUrl}}

If you are a new user, this link will allow you to register for up to 3 business days. After that time, you will need to contact {{CustomerName}} to receive a new link.

Click Here To Sign Up

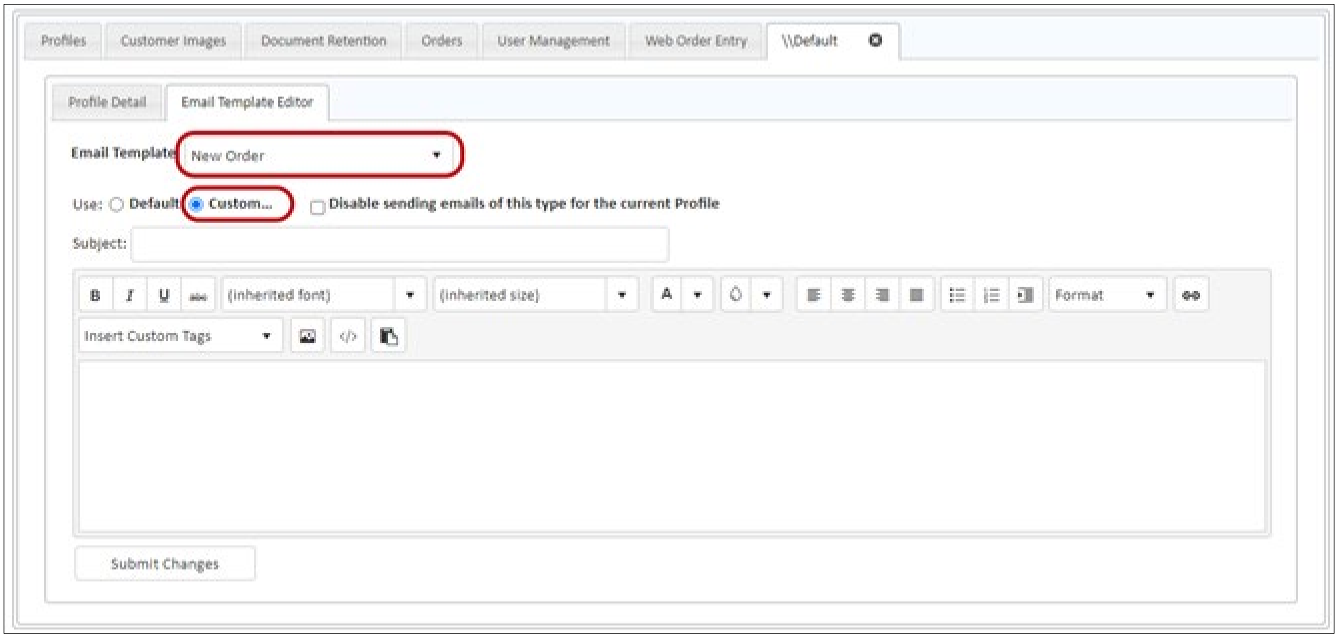
Click here to unsubscribe from these emails.

NOTE: The default **Order Closed** template does not include the **Summary of Charges** information. This may be added as needed.

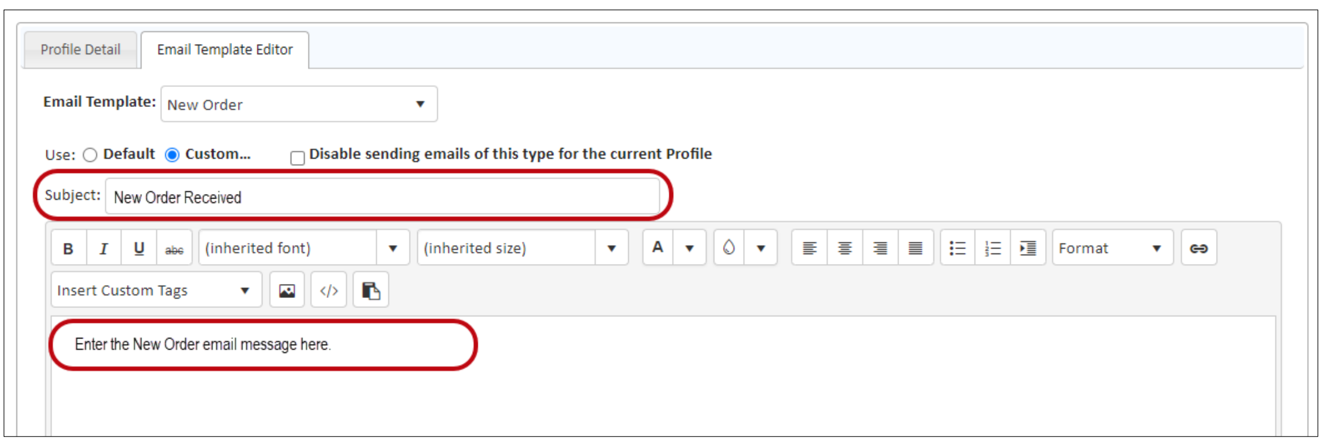
Customizing Email Templates

Customizing an email template provides the ability to enter a Subject line and change the appearance and content of the email message.

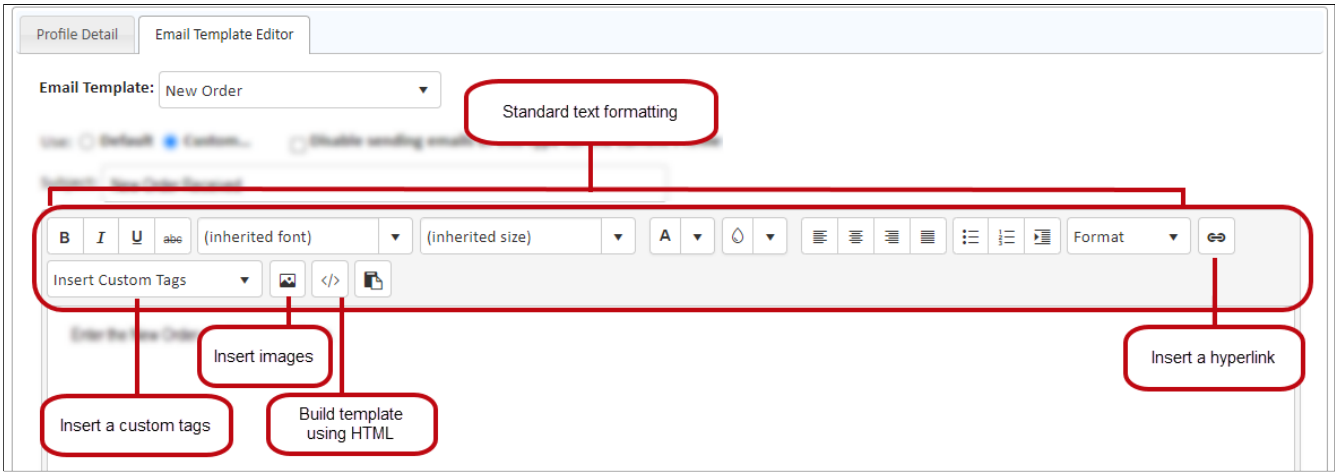
To customize an email template, from the **Email Template** drop-down, select the type of template. Click the **Custom** radio button. The **Subject** field, and message body field with formatting toolbar become active.



The custom **Subject** line and email message can be entered and formatted as needed.

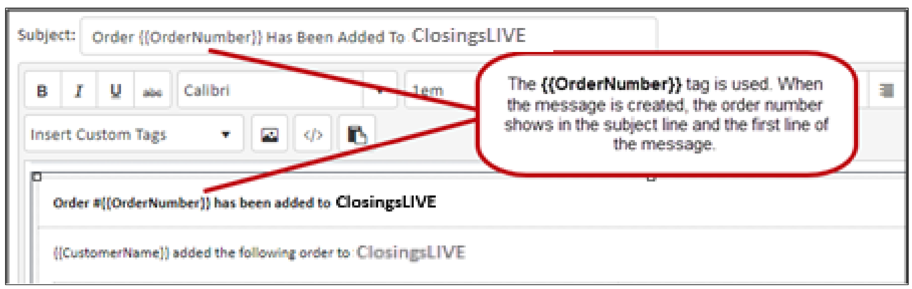


The message can be further customized by using the toolbar icons to change the font size, color, as well as additional options such as inserting hyperlinks, custom tags (e.g., OrderNumber, OrderStatus, or other order information), and images and building the template in HTML.

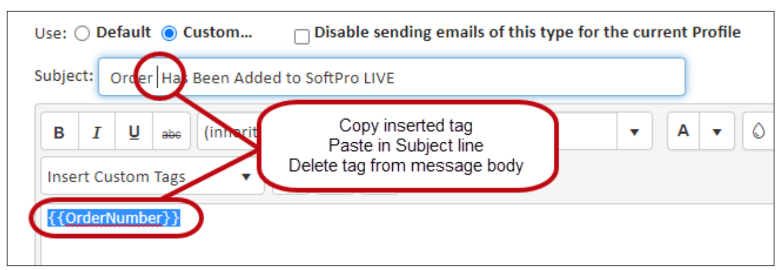


- **Insert Custom Tags**

When a custom tag is selected from the drop-down, the corresponding order information is pulled into the message.



NOTE: If inserting a custom tag in the subject line, it first must be added to the message body. Then copy and paste the tag into the **Subject** field at the location the information should appear. The custom tag can then be removed from the message body.

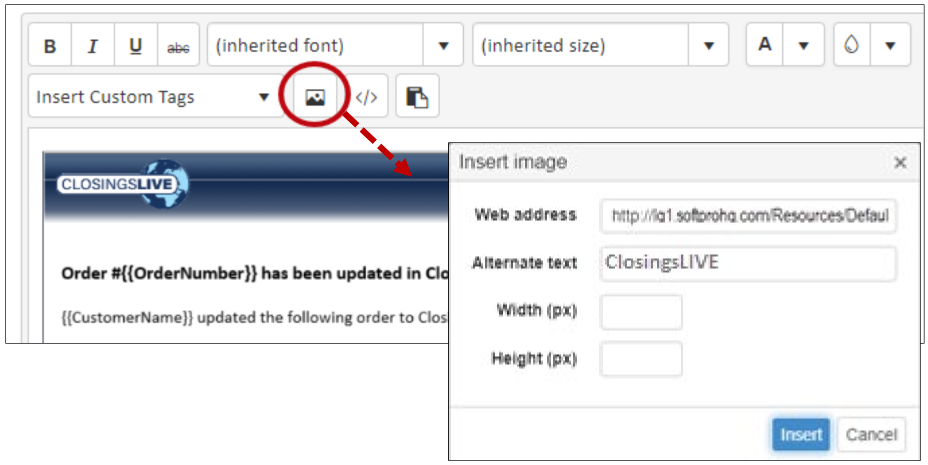


New custom tags have been added for the **Order Updated** and **Order Closed Email Templates** providing the ability to view only those changed items versus viewing all of the changes (using the **Change Detail – All** tag) in the **Summary of Changes**. The new tags are:

- **Change Detail – Activities Updated**
- **Change Detail – Contacts**
- **Change Detail – Document Added**
- **Change Detail – Message Added**
- **Change Detail – Milestones Updated**

➢ Insert image

Click the **Insert Images** icon to enter the location of the image to be shown in the message as well as alternate text (if the image is not displayed).

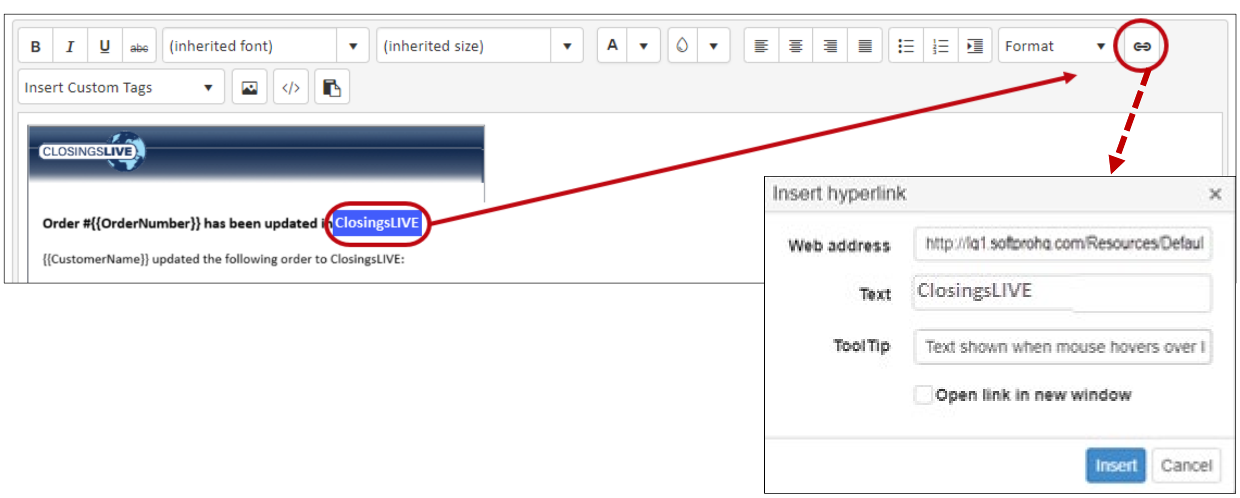


➢ Insert hyperlink

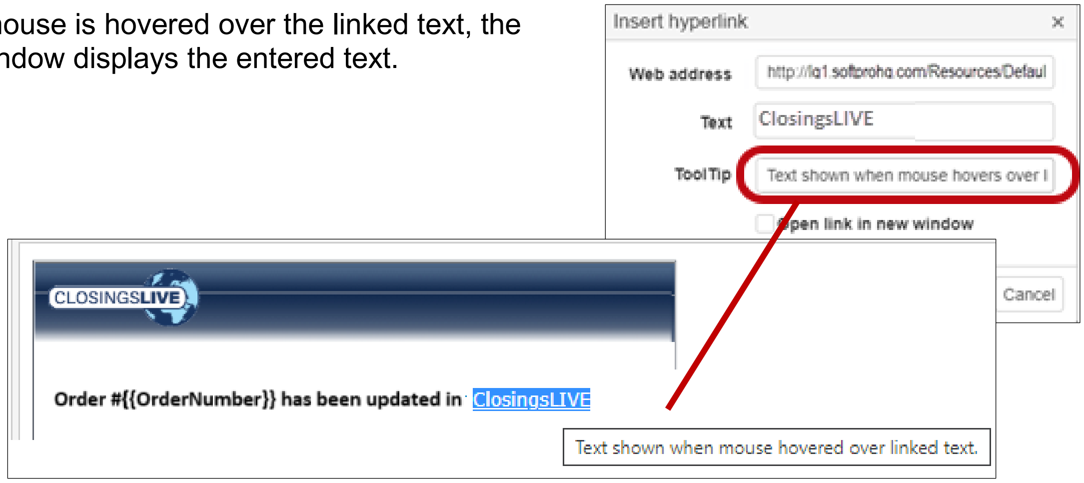
A hyperlink can be added to the message by highlighting the word(s) to be linked. Click the **Insert hyperlink** icon.

The Insert hyperlink window shows,

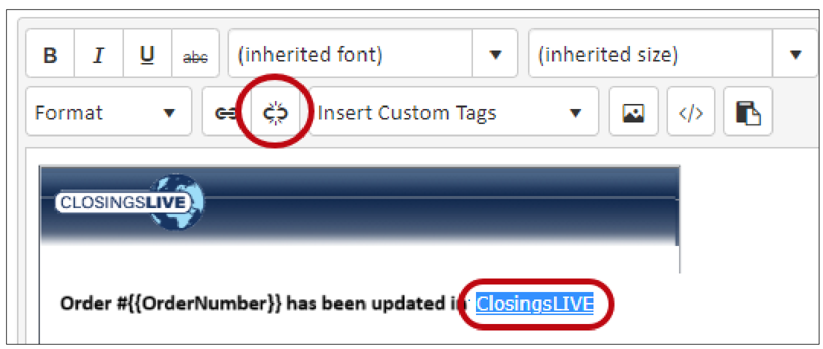
- » **Web address** field – enter the URL for the information to be linked.
- » **Text** field - populates with the highlighted text; changing the text here changes the text in the email.
- » **Tool Tip** field – enter text to be displayed when the mouse is hovered over the linked text.



When the mouse is hovered over the linked text, the **Tool Tip** window displays the entered text.



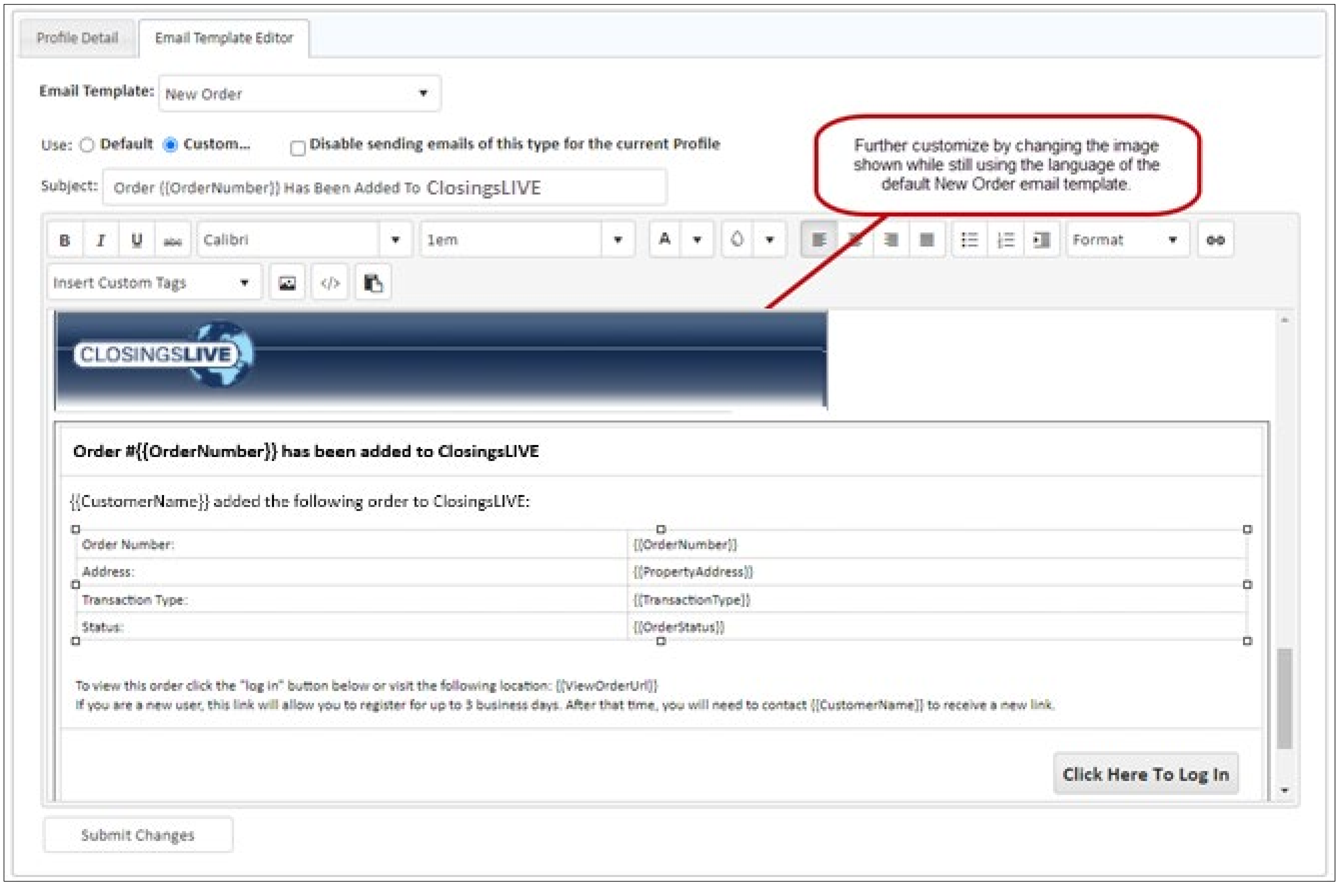
Once a hyperlink is inserted, the **Remove hyperlink** icon is active.



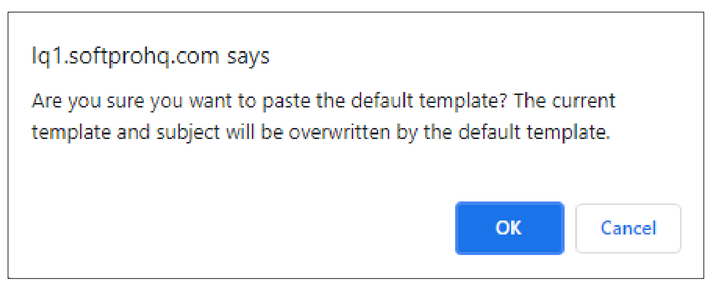
If the hyperlink should be removed, highlight the linked text, or place the cursor immediately after the linked text and click the **Remove hyperlink** icon.

Customizing a Default Template

The default template language can also be added by using the **Paste Default Template** icon. The template can then be further customized. For example, change out the default image to a company-specific image but still use the default template language, saving time when creating new.

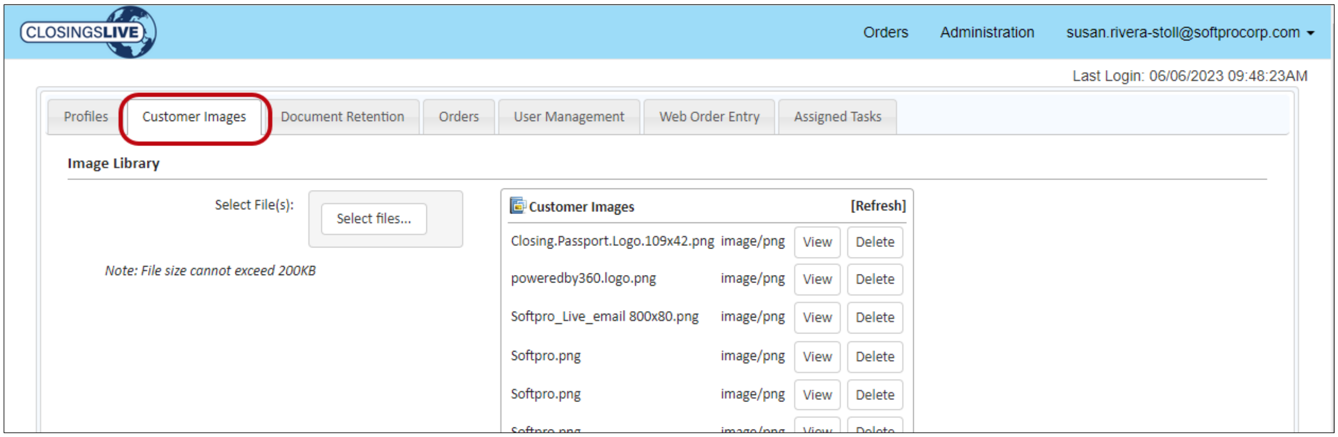


NOTE: If a custom subject line or message are entered prior to pasting in a default template, they are overwritten. As noted above, this can be changed once the paste is complete.



Customer Images Tab

The **Customer Images** tab allows the administrator to select a file to upload, view or delete an existing file.

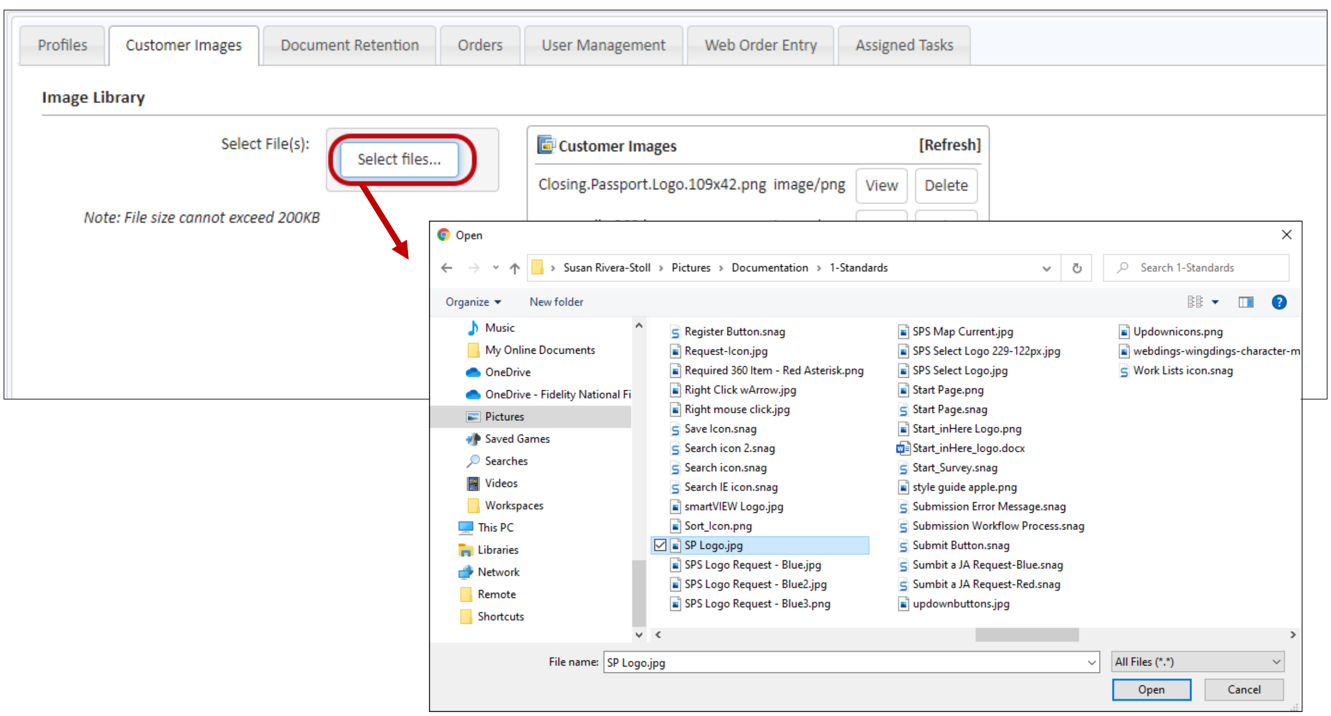


Uploading a New Image

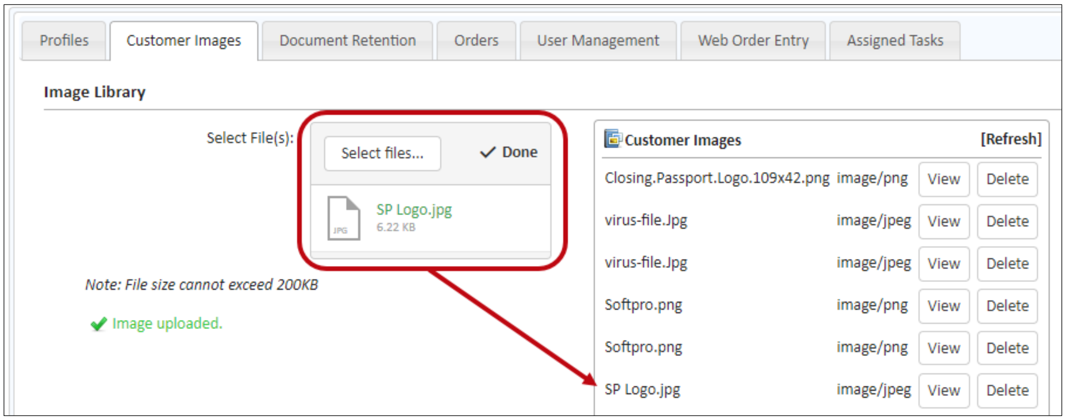
The administrator selects a file using the standard windows explorer file select dialog.

NOTE: Administrators can also drag-and-drop an image file to the Image Library if using Google Chrome browser.

Once the file is selected, click the **Open** button and the image automatically uploads.



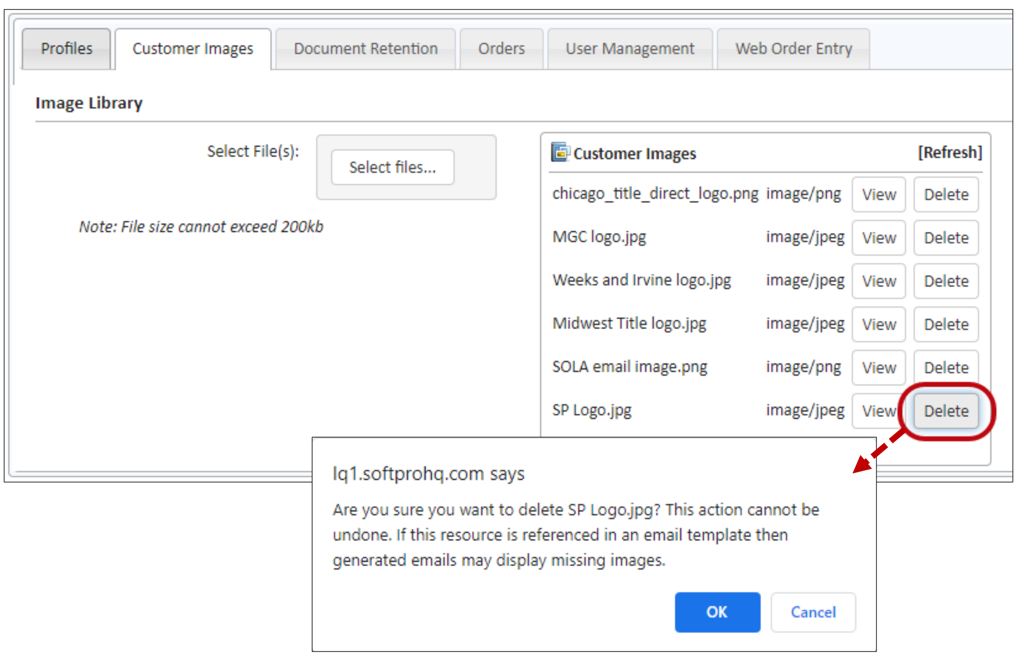
A confirmation message is shown when the upload is successful.



Supported file types are GIF, JPG and PNG and must be less than 200kb in size. An error message is shown if an error occurs during upload.

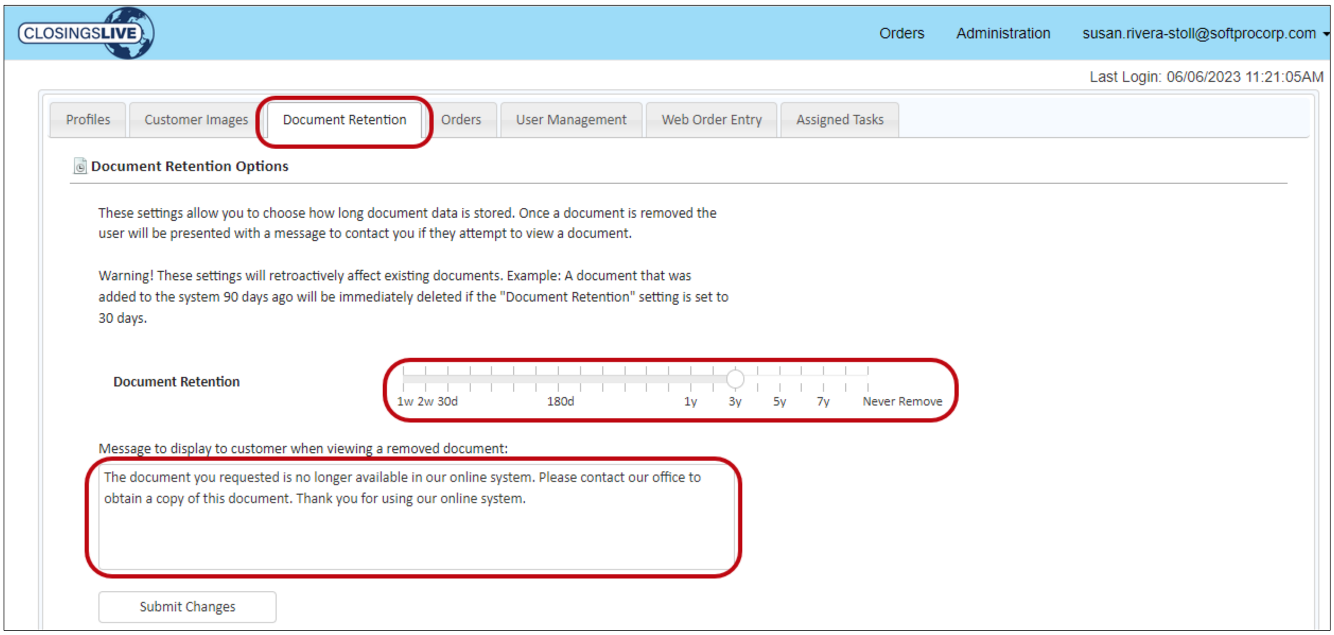
Use the **Delete** button to remove an image from the **Image Library**.

Once deleted, it cannot be undone. Verify the image is not referenced in an email template prior to removing.



Document Retention Tab

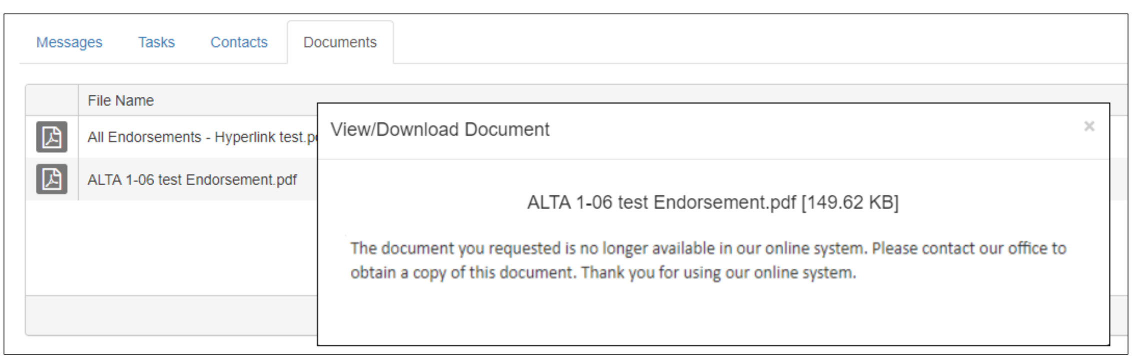
The **Document Retention Option** allows the administrator to select the period documents are retained in storage and customize the default message to be displayed when the document is no longer available.



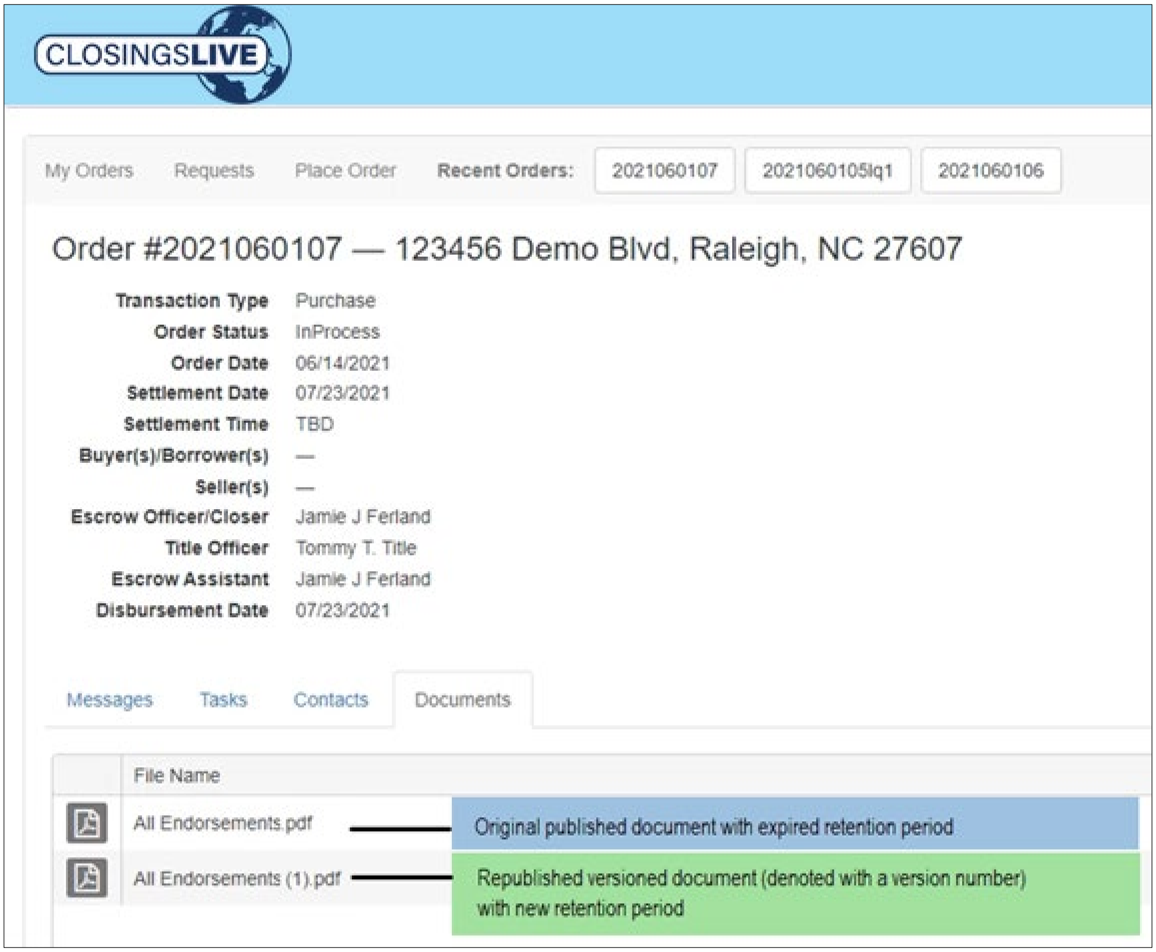
Document Retention (slider) – use to set the time documents are retained in storage. The retention period begins on the date the document was published.

IMPORTANT: This setting affects all documents retroactively. For example, if a document was added 90 days ago and the retention period is set to 30 days, that document is no longer available and is immediately deleted.

Message to display to customer when viewing a removed document - The default message shown when attempting to access a purged document. This can be customized.

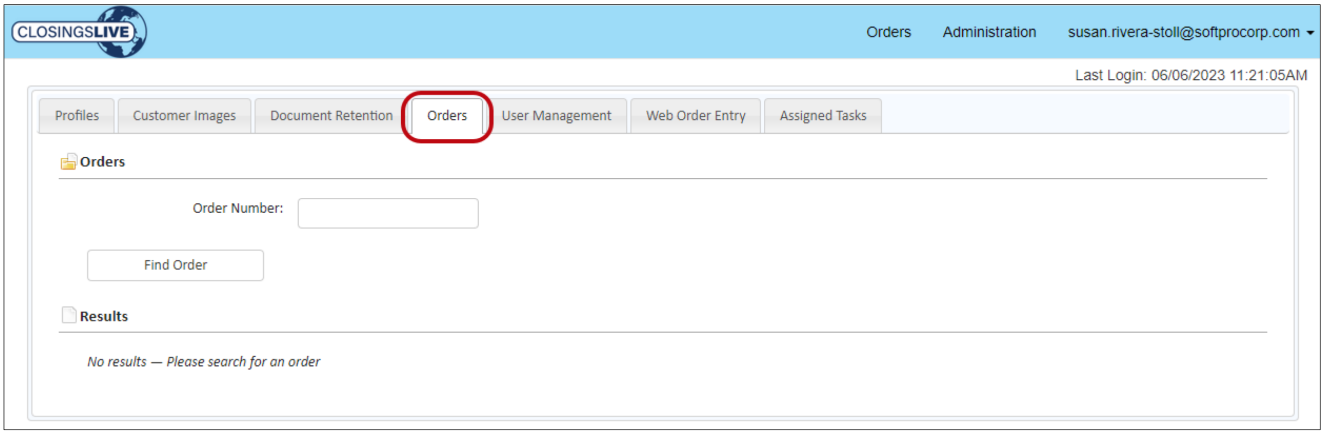


NOTE: Once a document is removed it can be republished to ClosingsLIVE. The program versions the document when published with the same name. The document retention period begins when the document is published.



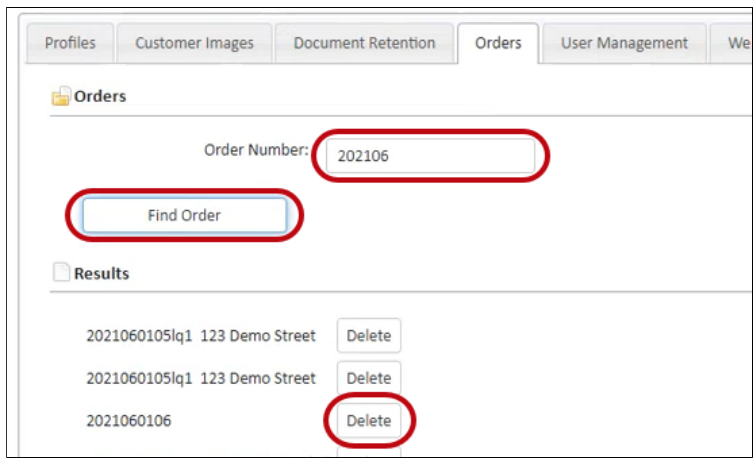
Orders Tab

From the **Orders** tab, the administrator can delete an order from ClosingsLIVE. Deleting the order from ClosingsLIVE does not delete the order from ProForm.



In the **Order Number** field enter the full or partial order number and click the **Find Order** button. Once located, click the **Delete** button for the corresponding order.

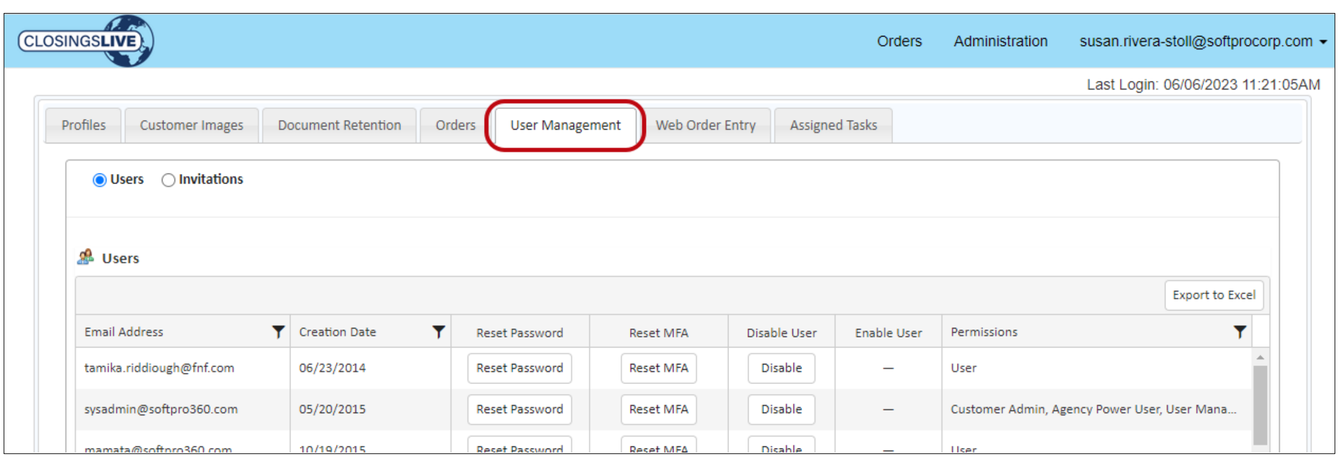
NOTE: Publishing to the order re-activates the order in ClosingsLIVE.



User Management Tab

The **User Management** tab identifies,

- **Users** – active ClosingsLIVE users.
- **Invitations** – recipients not yet activated but received an invitation for ClosingsLIVE.



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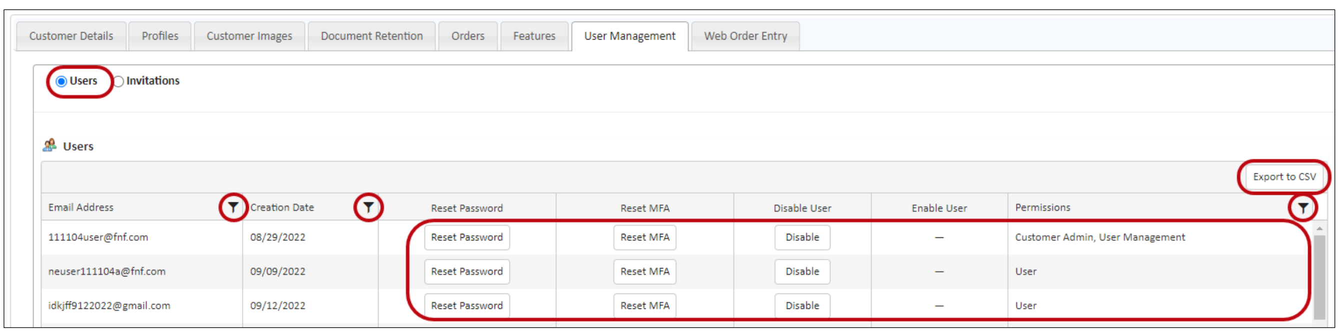
From this tab, the administrator can,

- Reset a password for an active user
- Reset all MFA (Multi-Factor Authorization) – once reset, the user is then prompted to set up all MFA options upon their next login
- Disable or Enable an active user
- Send or Resend an invitation to a recipient
- View Permissions for all users and export a list of users and their permissions to CSV

The **User** list can be filtered by **Email Address**, **Creation Date** or **Permissions**. Click the **Export to CSV** button to export a user list with their corresponding permissions.

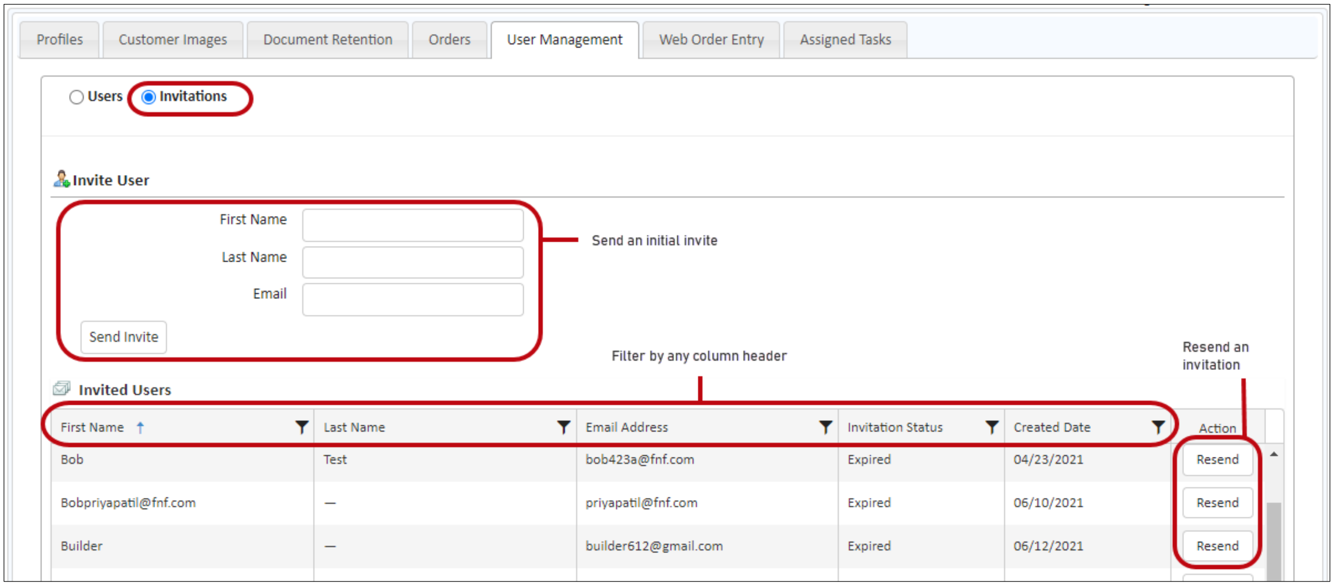
Each user is shown with their respective permissions listed in the Permissions column. When exporting the user list, a user with multiple permissions is shown multiple times; one row for each permission granted.



The available permissions are,

- **Customer Admin**: grants the user the ability to create or modify profile details, upload images to be used on email templates, create or modify email templates, set document retention, configure web order entry (if module is enabled).
- **User Management**: grants the user the ability to invite new users, resend an invitation, reset a user's password or MFA, disable users.
- **Power User**: grants the user the ability to see all documents and data published to SPLive without being permissioned to the order during order publish.
- **Product Templates**: grants the user the ability to add, edit, delete SPLive product templates used during order publish.
- **Public Documents**: grants the user the ability to mark a document as publish (viewable without authentication) during order publish.
- **User**: general user, no elevated permissions.

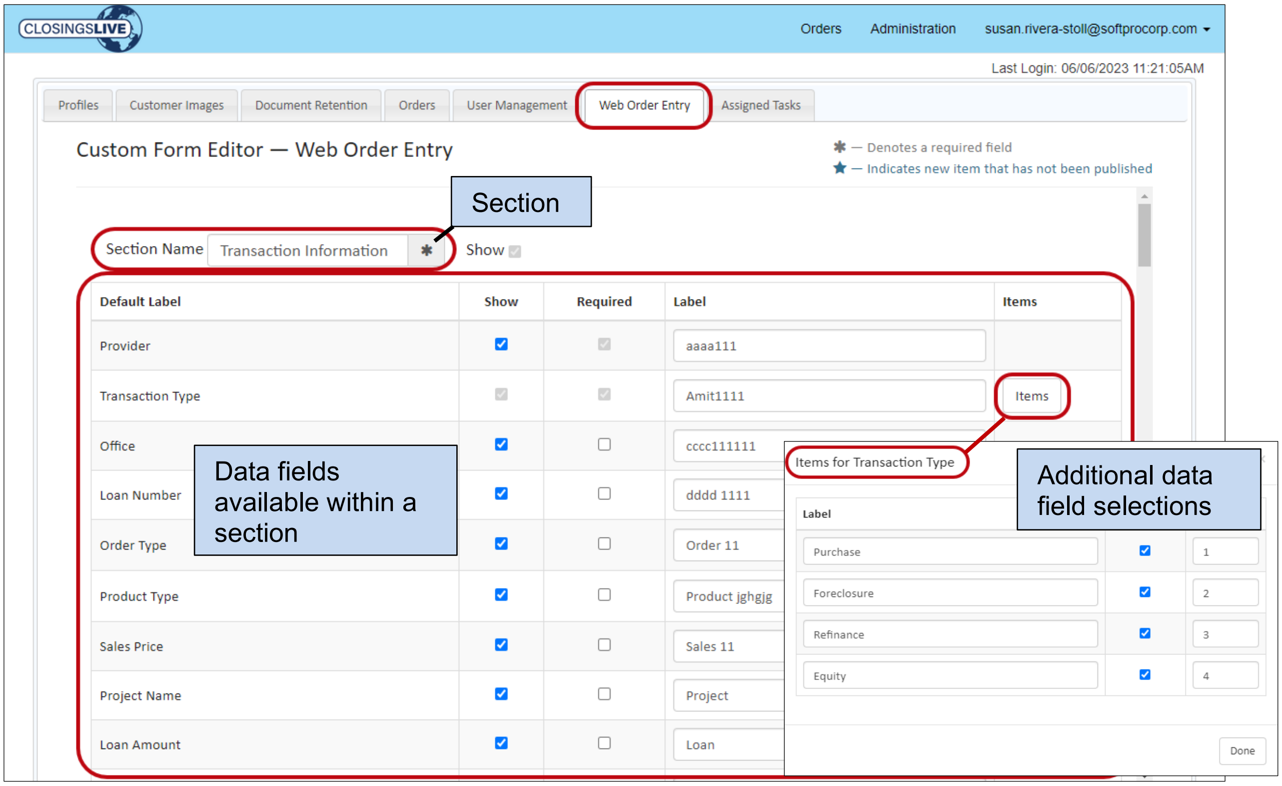
The **Invited Users** list can be filtered by any of the column headers with the exception of **Action**.



Web Order Entry Tab

If Web Order Entry is utilized in ClosingsLIVE, from the **Web Order Entry** tab the administrator can customize the web order form by identifying which sections show and within each section which line items are shown.

The **Web Order Entry** form is broken into topic sections with each topic containing data fields pertinent to the section. Data fields within a section can also contain additional data to be selected.



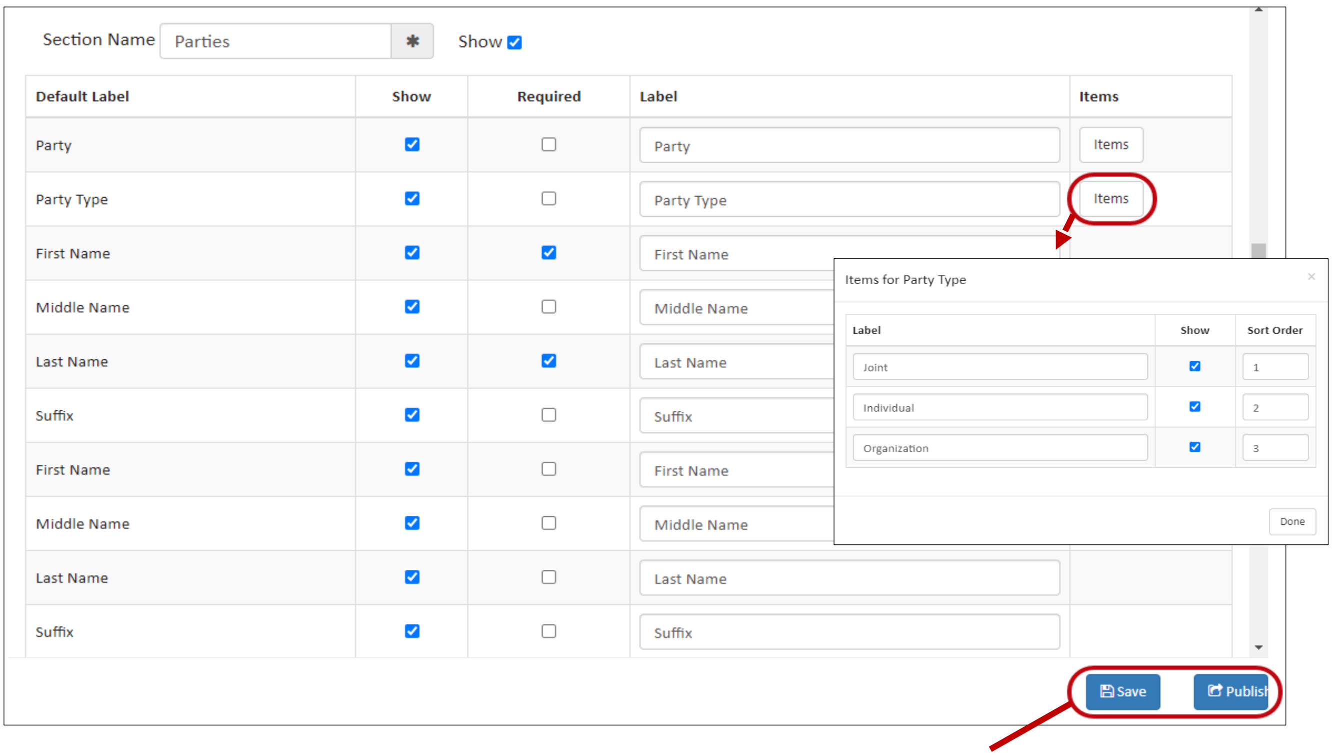
- **Transaction information** – provides information pertaining to the type of transaction, provider, loan number, loan amount, settlement date, marketing representative, name and company name of the party submitting the order, etc.
- **Property information** – type, street address, county, lot, and block information, legal
- **Parties** – parties to the transaction (buyer and seller), type of contact, contact information
- **Municipal Searches** – search selections
- **Contacts** – contact type and information for parties other than the buyer and seller
- **Payoff** – payoff information for up to three payoffs
- **Notes and Attachments**

Each section and their related fields within the section can be marked as,

- **Show** – if checked, the corresponding section and data fields are shown on the form
- **Required** – if checked, information must be entered or selected on the form to proceed

Data fields within a section allow for,

- **Label** – name of the field shown on the form; may be modified if needed
- **Items** – allows additional entries to be shown and ability to define the order in which they appear



Use the **Save** button to save the changes without moving it to production.

Use the **Publish** button when all entries have been updated and you are ready to move it to production.

Assigned Tasks Tab

NOTE: Enable Assign Tasks must first be enabled at the customer level by the system administrator and then on the specific **Profiles Detail** tab. This allows the SoftPro user to assign a task to a web user.

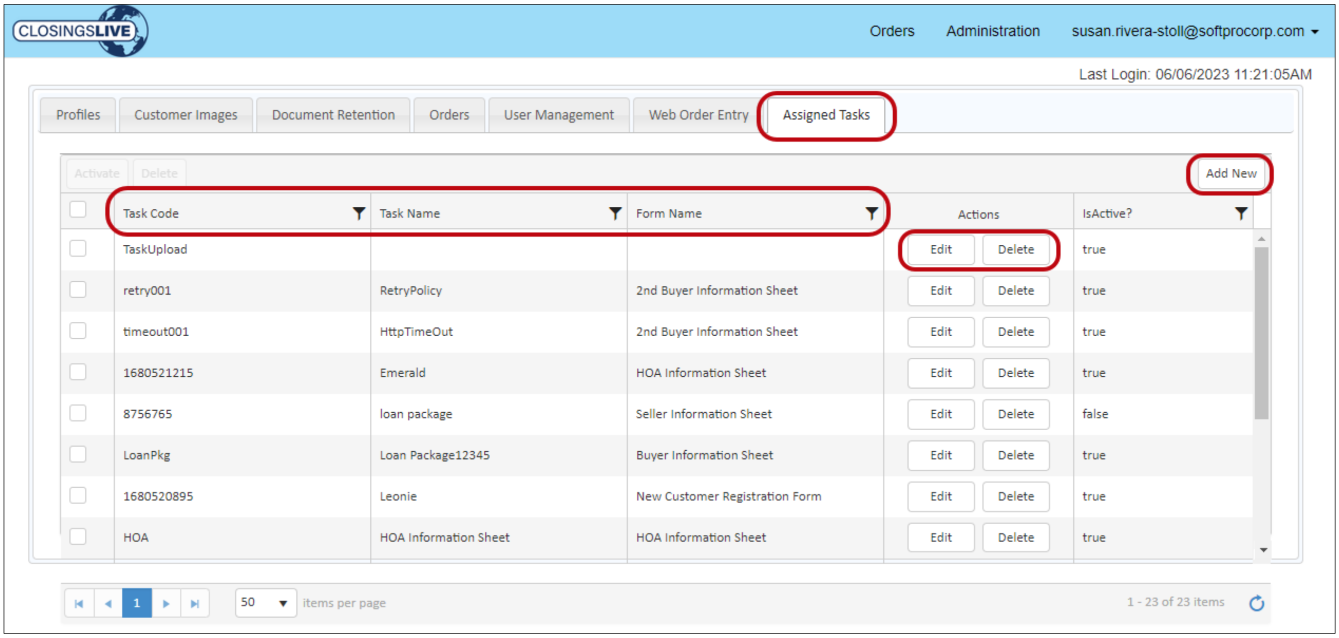
From the **Assigned Tasks** tab, the administrator can define an action (upload or complete online form) assigned to a task, associate an online form with the task and activate the assignment.

This allows the user to assign a task with an action to be taken (upload a document or complete an online form).

The administrator can,

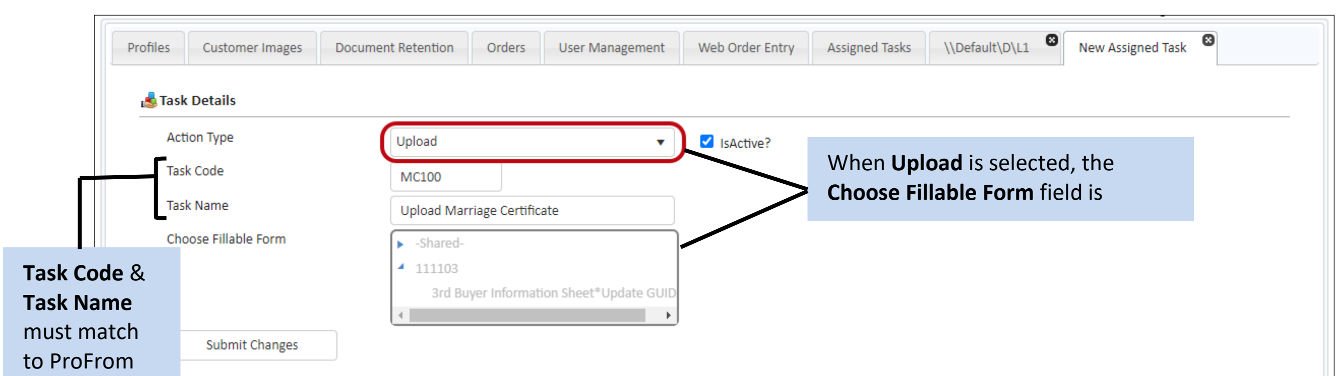
- **Add New** – assign a form and it's corresponding action to a task and enable the task assignment
- **Edit** – the action, task and the form associated to the task
- **Delete** – the assigned task entry

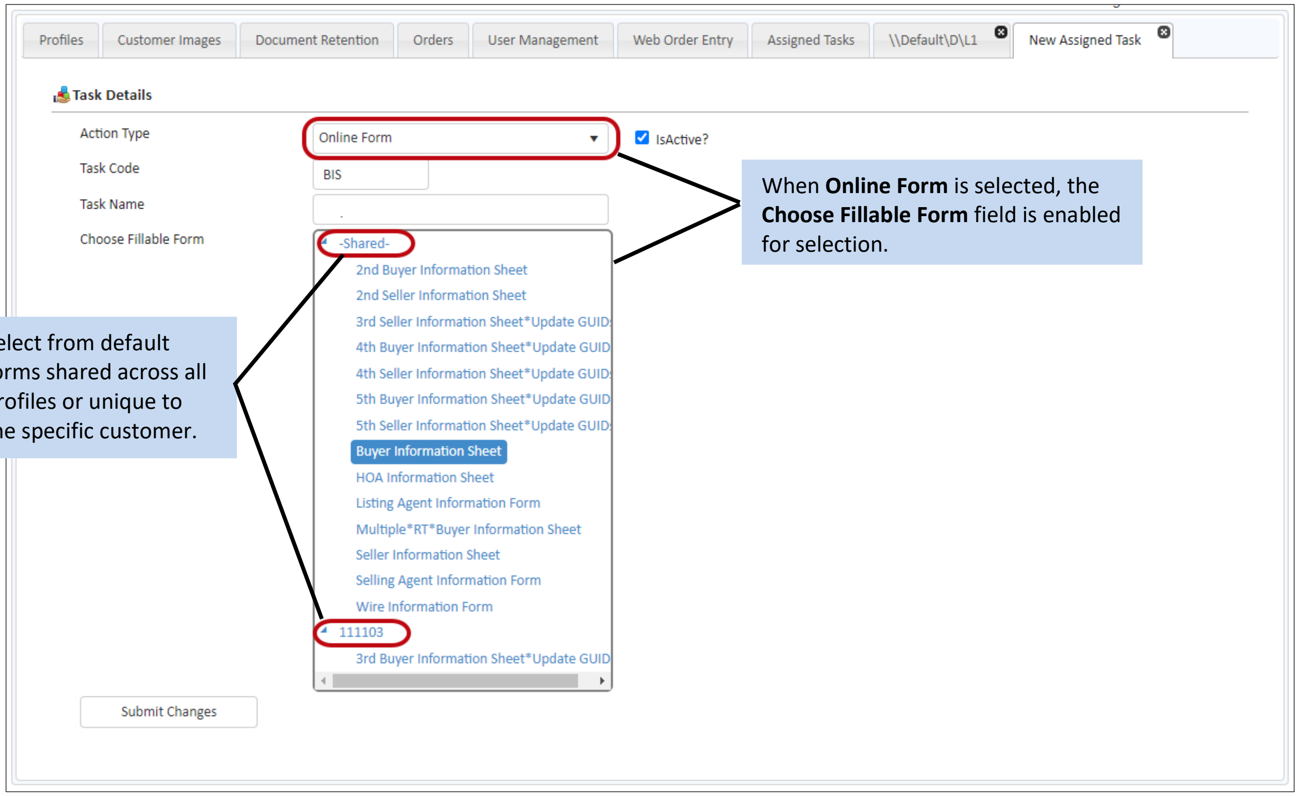
The Assigned Tasks entries can be filtered by **Task Code**, **Task Name**, **Form Name** and **IsActive**.



To add a new task association, click the **Add New** button. From the **Task Details** screen, select the,

- **Action Type** – The available options are **Upload** or **Online Form**; selecting **Online Form** enables the list of available forms in the **Choose Fillable Form** drop-down.
- **Task Code** – This must match the ProForm Task Code.
- **Task Name** – This must match the ProFrom Task Name.
- **Choose Fillable Form** – This drop-down provides a list of default forms available either shared across all profiles or unique to the specific customer.
- Required fields are, **Action Type**, one of either **Task Code** or **Task Name** and **Choose Fillable Forms** (only if **Upload** is the selected action type).





Check the **IsActive** check box to activate and click the **Submit Changes** button to save the entry.

Once the new task assignment is submitted, it is viewable on the **Assign Tasks** tab. It can then be assigned to the ClosingsLIVE web user by an escrow officer through the 360 integration.