ClosingsLIVE User Guide

July 2024

History

Date	Version	Details
07/2016	1.0	Initial User Guide
01/2019	2.0	New functionality to capture documents published to Live in Order Notes
08/2019	3.0	Hyperlinked Documents
09/2019	4.0	- Updated screenshot of Order Details for viewing an Order - Messages written to Order Notes will have SPLive category checked if the category exists in SPAdmin
02/2021	5.0	Milestone Tasks and Okta Authentication
01/2022		Enhancement to send messages to the order Officer New product registration/notification column New Read Receipt to quickly identify if your message was read
03/2022		Permissions added at the Contact Person level
10/2022		Public Documents functionality
11/2022		Documents inheriting Message permissions when attached.
12/2022		New functionality to select and download multiple documents at one time
01/2023		This release provides the ability to, grant/deny product templates permissions view Attachments folder structure in SPLive grant permissions for documents by folder display/hide Order Officers on the web
03/2023		Functionality to generate self-service invitation
05/2023		Application Name Change New Mobile App
07/2023		New functionality • Send notifications to customers to complete a task (upload / complete a form). • Allow the customer to fill in the form online and submit electronically.
09/2023		New (Submitter and Company) name fields added to the Web Order Entry form. Field data written to Order Notes when imported.
02/2024	7.0	This release includes • New order processor • Replaced the ability to filter/search individual columns shown on the Live Web with ability to enter search criteria in the Find Orders field and the application filtering corresponding fields on screen.
07/2024		New functionality added for SMS Text Alerts.

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CLOSINGSLIVE

Welcome to ClosingsLIVE

Introduction

ClosingsLIVE is a secure portal used by all parties associated with a real estate transaction. From the Selling Agent to the Listing Agent, users can log into ClosingsLIVE on the web or using the mobile application to view the status of a file, order messages, and contact information of each person that plays a role in the sale of a home.

ProForm users control access to ClosingsLIVE by using the ClosingsLIVE Administrative Tool. Here you can upload contact information, documents, and the status of each order's tasks to ClosingsLIVE quickly and easily. All this is done directly from the order within ProForm eliminating the need to rekey any data. Create a personalized experience by setting up automatic email notifications for each contact and change the permissions for who can see who. Using the ClosingsLIVE Administrative Tool allows you to give an insight into the order without the need to email a contact anytime something changes.

Key Features

- Provide all appropriate parties involved in the Real Estate transaction (buyer, seller, real estate agent, settlement agent, lender, etc.) with access to a secure portal via the web or mobile application. They can then check the real-time file status of a transaction(s) at any given time.
- Permissions on each setting allows you to customize access for each user.
- Quickly and securely upload documents for everyone to download and view via the web portal or mobile app (the ability to download a document is only available via the web portal at this time).
- Keep your customers updated with e-mail notifications regarding the order status.
- Allow your customers to communicate securely with you via the email address configured during setup as well as the Escrow Officer, Title Officer or Escrow Assistant entered in the order and have messages and documents flow back to your ProForm Order. Refer to Messages – Sending/Receiving a Message to the Order Officer for details.

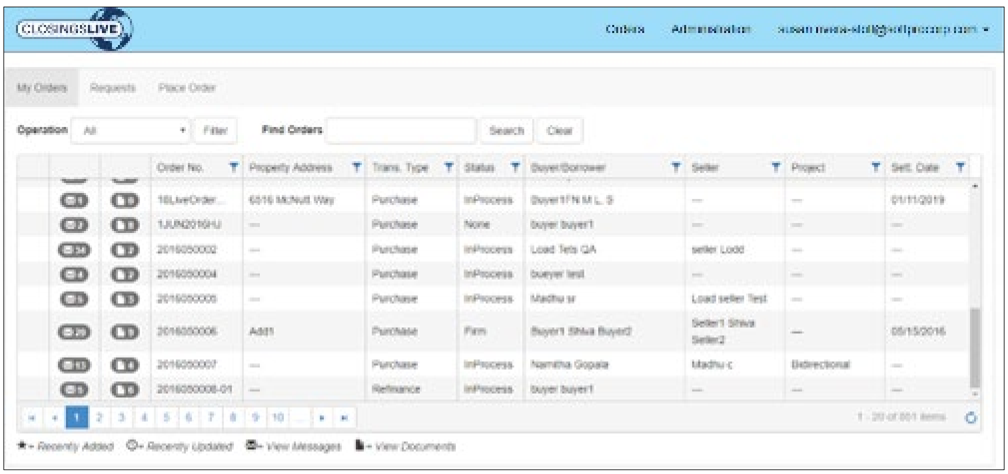
About This Guide

We hope this guide helps you utilize ClosingsLIVE to the fullest. Here you discover how to use the ClosingsLIVE Administrative tool and setup templates to apply permission settings quickly. In addition, we demonstrate the ClosingsLIVE portal and the ClosingsLIVE Mobile app, tools that give insight to the order to your customers.

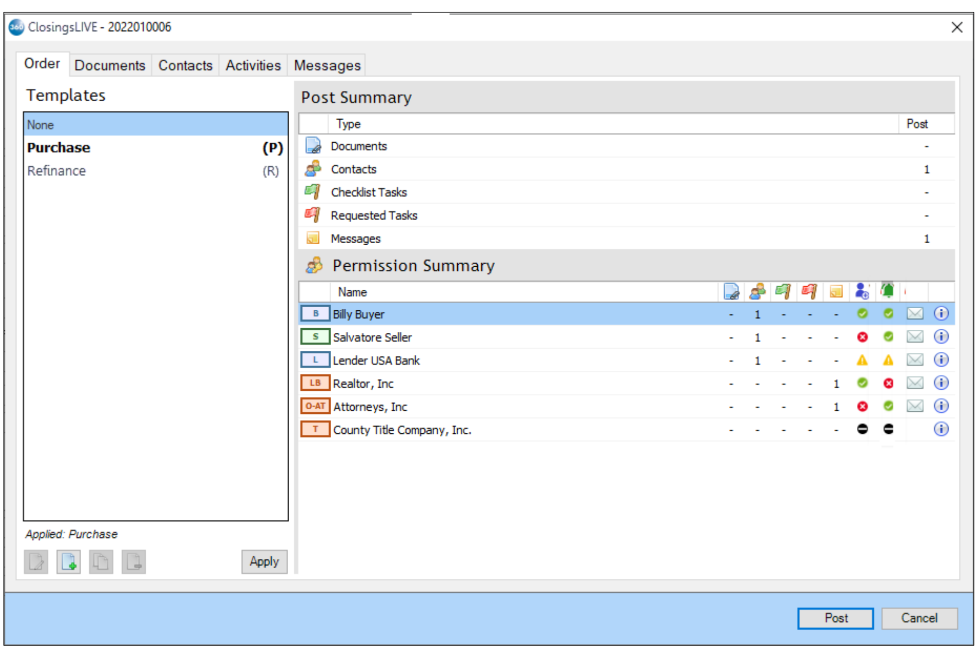
The Basics

Who Uses What?

Your customers access ClosingsLIVE by opening an internet browser and entering the URL provided during implementation. The user can log in and view information regarding any order they have been granted permission to view. Your customers can also access order information via the ClosingsLIVE Mobile application. Refer to the ClosingsLIVE Mobile Application section for more information.



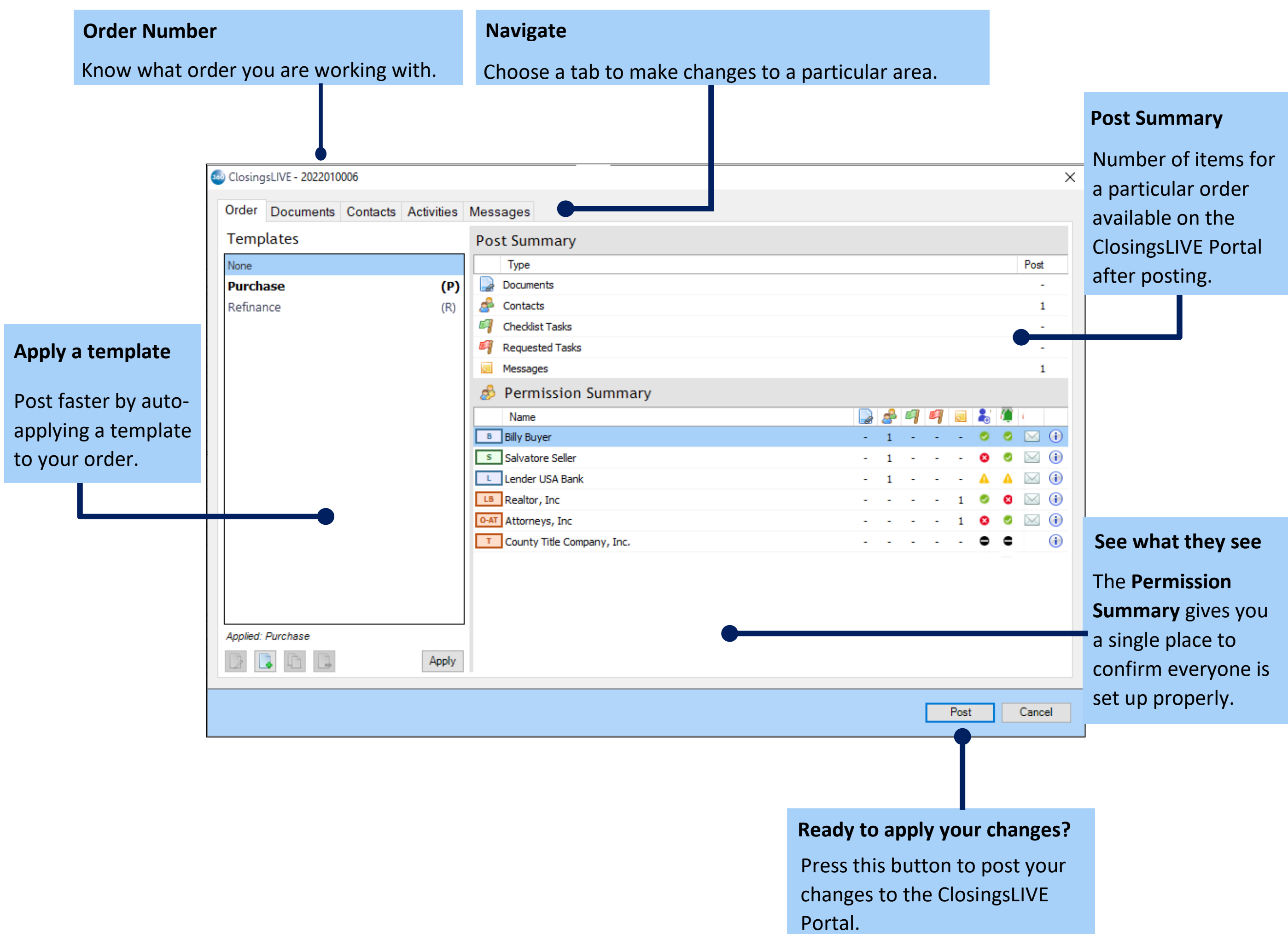
As a ProForm user, you manage your customer’s access to ClosingsLIVE by using the ClosingsLIVE Administrative Tool. The tool allows you to quickly see who has registered, customize who can see who, upload a document, add a message, or view the activities associated with an order.



The following section describes the ClosingsLIVE Administrative Tool. For more information on the ClosingsLIVE Portal or Mobile Application used by your customers, go to the section entitled Your Customers' View to Order Information.

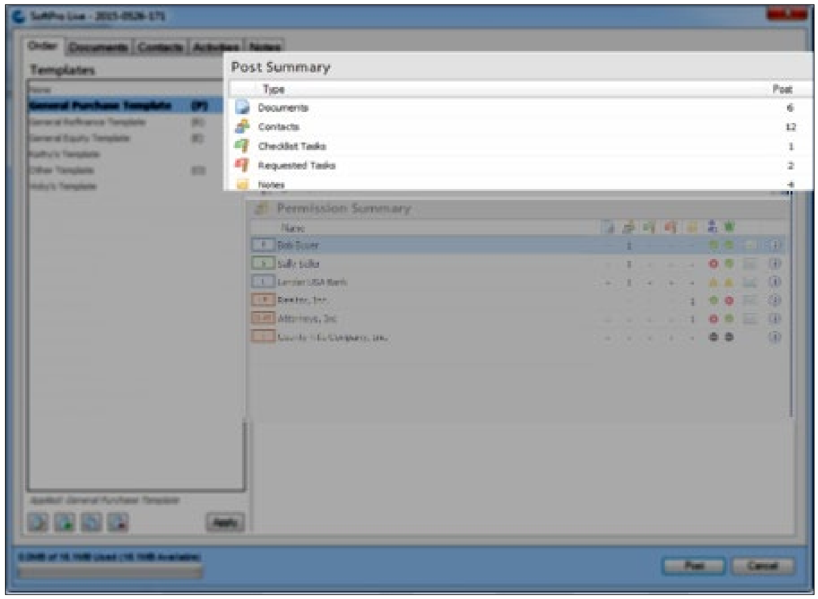
Overview of Your Dashboard

When you first open the ClosingsLIVE Administrative Tool, the dashboard provides a visual overview of the number of documents, tasks, and messages associated with a single order, view contact permissions, and use a template to apply specific rules and settings for an order allowing you to spend less time setting up an order and more time servicing your clients.



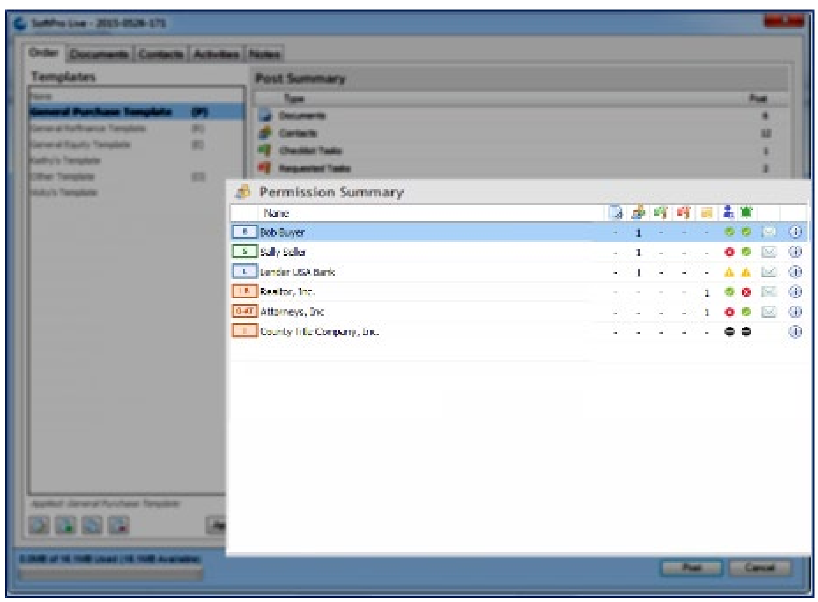
Post Summary

The **Post Summary** shows you the number of documents, contacts, tasks, and messages available on the ClosingsLIVE Portal after posting. It includes items that may have already posted to the site and those that will be available after clicking the **Post** button.



Permission Summary

Check the **Permission Summary** to confirm each contact's permissions have been applied and set properly. This overview combines all the permissions set on each tab in a single place, so you can quickly scan each contact.



 This column shows the number of documents each contact can view.

 This column shows the number of contacts each contact can view.

 This column shows the number of checklist tasks each contact can view.

 This column shows the number of requested tasks each contact can view.

This column shows the number of messages each contact can view.

This column shows the registration status of all people associated with the contact and whether they have been given View permission to at least one item.

- Contact has been granted View permission to at least one item and all people associated with this contact have registered.
- Contact has been granted View permission to at least one item but no people associated with this contact have registered. Click the Information icon to view details.
- Contact has been granted View permission to at least one item but at least one person associated with this contact has not registered. Click the Information icon to view details.
- View permission has not been granted for this contact.

This column shows the status of receiving notifications for the people associated with this contact and whether they have been given Notify permission to at least one item.

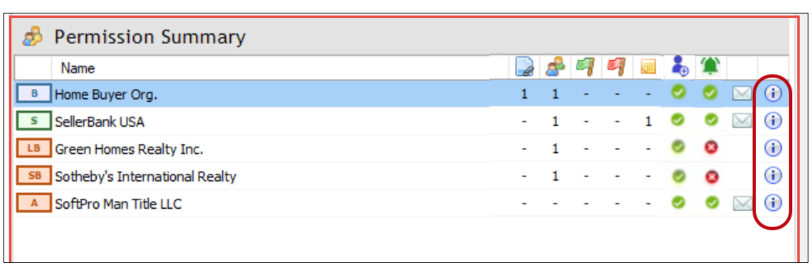
- All people associated with this contact will receive notifications when the notify checkbox is checked.
- All people associated with this contact have opted out of receiving notifications in their Preferences settings.
- Some people associated with this contact have opted out of receiving notifications in their Preferences settings.
- Notify permission has not been granted for this contact.

The Envelope icon indicates the contact has been granted at least one permission to receive email updates.

The Information icon allows you to view the specific details of documents, contacts, tasks, and messages a contact can view.

More about the Information Icon

From each tab in ClosingsLIVE, the **Information** icon appears to the right of a contact inside the permission summary grid. By clicking the icon, you may change the view and email settings from the User Details screen of all documents, contacts, activities, and messages for a single contact or contact person currently given to the user.

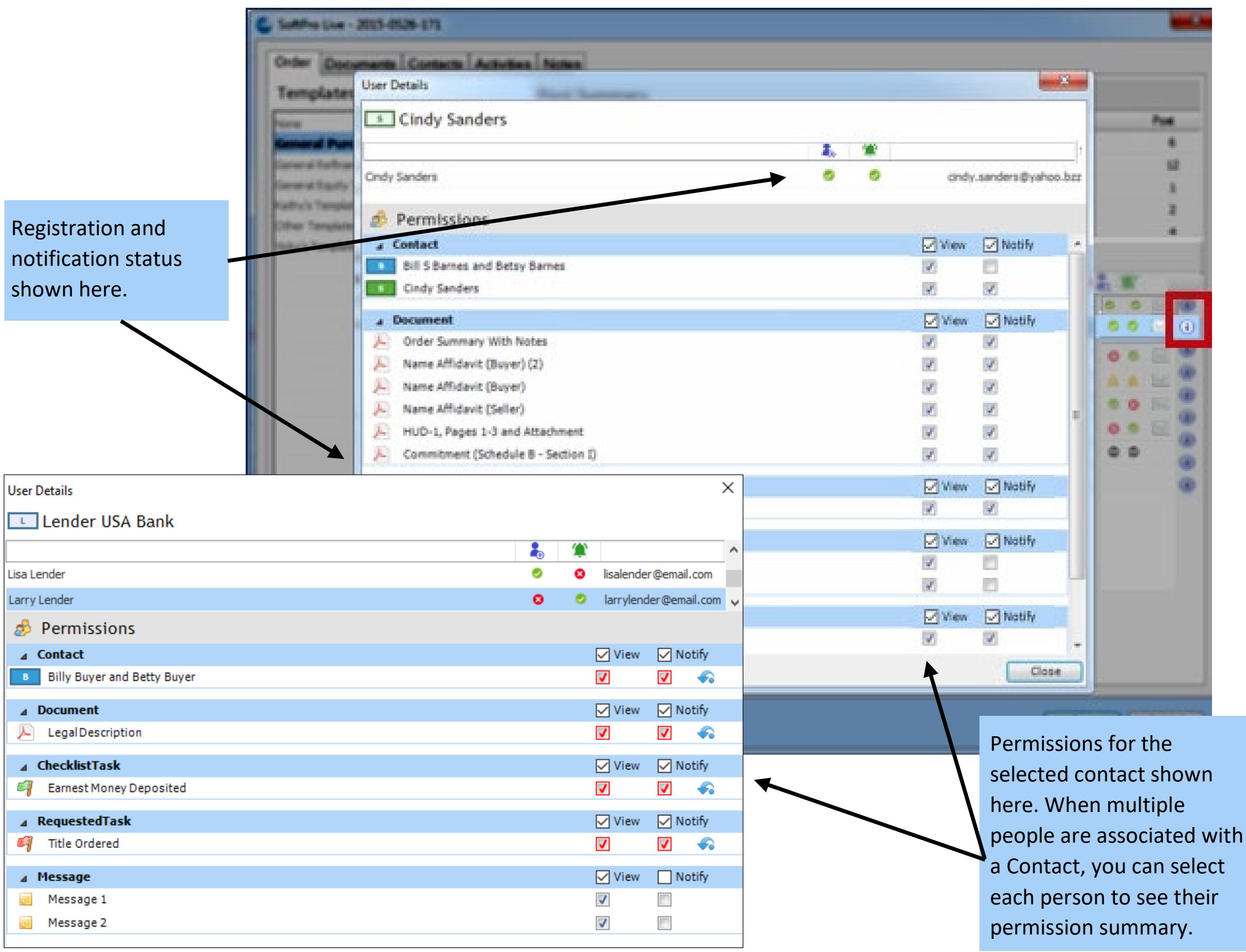


The selected contact shows the Registration and Notification status at the top (refer to above for the full list of the icons and the corresponding definition) and the various permissions shown below.

In the examples below, Cindy Sanders has been granted View and Notify permission to at least one item and has registered and opted to receive notifications. If Cindy Sanders logs in with the mobile app, push notifications would also be received when Notify permission is granted. The Registration and Notification columns show the green icon.

The Lender USA Bank contact shows two contacts where Lisa Lender has been granted View and Notify permission to at least one item and has registered (green icon) but has turned off the notification preference setting (red icon). Larry Lender was granted View and Notify permission, has not registered (red icon) but has opted to receive notifications (green icon).

NOTE: Permissions can be set at the Contact (i.e., Lender) or Contact Person level (i.e., Lender employees) on the **Documents**, **Contacts**, **Activities** and **Messages** tabs. Refer to Share a Document section to learn how.



Getting Started

Open the ClosingsLIVE Administrative Tool

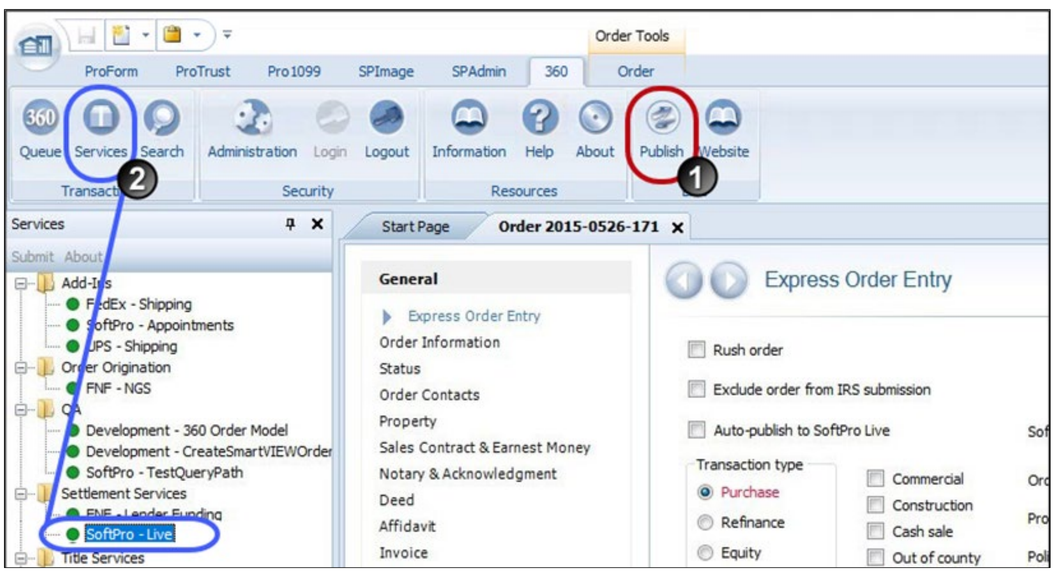
You can access the ClosingsLIVE Administrative Tool in one of two ways:

Select users

Option 1. From the **360** ribbon click the **Publish** button. If the order is already open, the ClosingsLIVE Administrative Tool opens the order directly. If no orders are open a dialog box launches where you enter the order number of the order you would like to post to the ClosingsLIVE portal.

NOTE: New users must register an account with SoftPro 360. Follow the steps from the login prompt to setup a new account. Existing users may be required to re-login if their previous session expired.

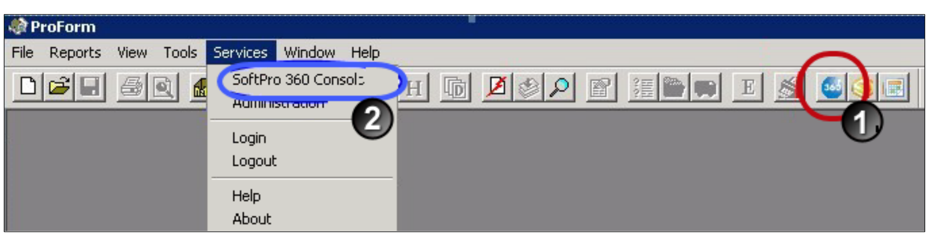
Option 2. From the **360** ribbon click **Services**. The **Services** menu opens on the left. Double-click the **Closings Live** entry. A dialog box opens, allowing you to select an order already opened in the background or enter the number of another order you wish to post to the ClosingsLIVE portal.



Enterprise and Standard Users

Option 1. Click the **360** icon to launch the **SoftPro 360 Console**.

Option 2. Click the **Services** menu and then click the **SoftPro 360 Console**.

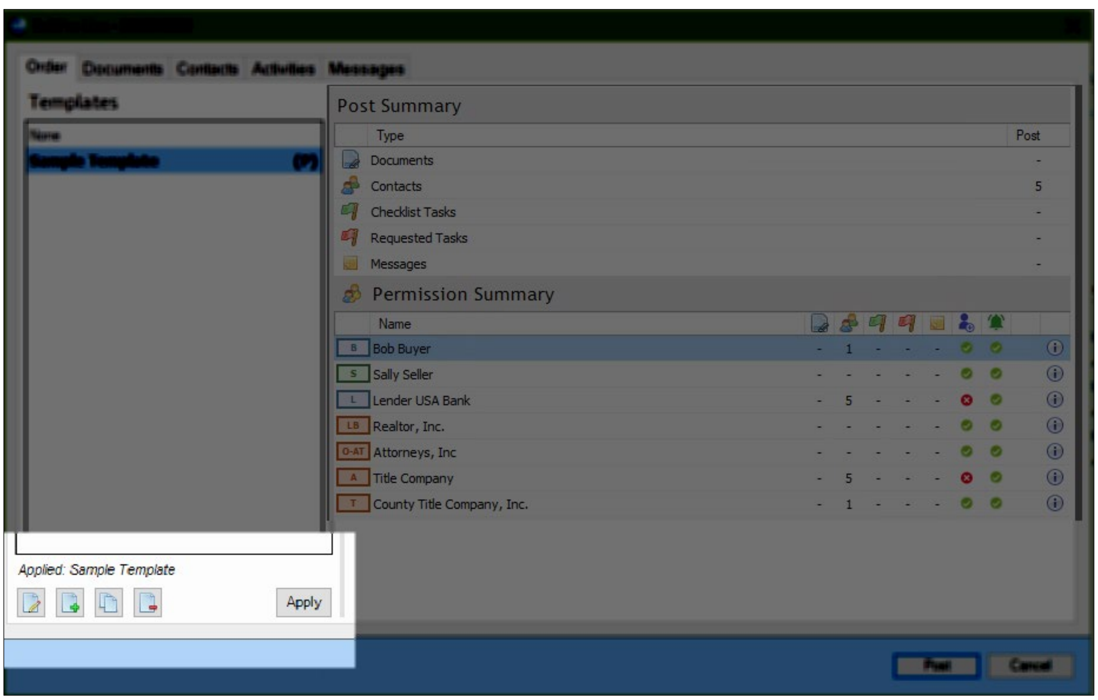


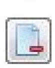
Apply a Template

Setting up templates in advance saves time when publishing an order to ClosingsLIVE. Depending on the type of order, you can automatically have a template applied so you don't have to remember which template to add.

When the user permission is granted, the Template toolbar in the lower left of the **Order** dashboard is enabled and template changes are permitted. Discover how to set up rules and edit templates here: [More about Templates.]()

WARNING: Editing a template or deleting a template affects all orders currently associated with the template. This could result in removing all permission settings to every order for every user using ClosingsLIVE in your company. Be very careful when changing a template. You cannot recover a template once deleted and must re-apply the template individually to every order used to make changes to a template without starting from scratch.



	**Creates a new template**	New templates contain no preset data.
	**Edit template settings**	Change the name, create/edit a rule, or change the order type of a selected template.
	**Copy the selected template**	Copy the selected template.
	**Delete the selected template**	Delete the selected template. Orders associated to the deleted template default to **NONE**.
Apply	**Apply**	After selecting a template, click to set the template and settings to the order.

Share a Document

The **Documents** tab provides a central place to manage all the documents that are posted to the ClosingsLIVE Portal. Here you find all ProForm order documents that have been uploaded and are available to share with your contacts, or if you choose to only share with specific contacts, you may make those changes as well. You can also upload new documents securely from the ClosingsLIVE Administrative Tool. Once you post to the order, any new documents are added back to your ProForm order.

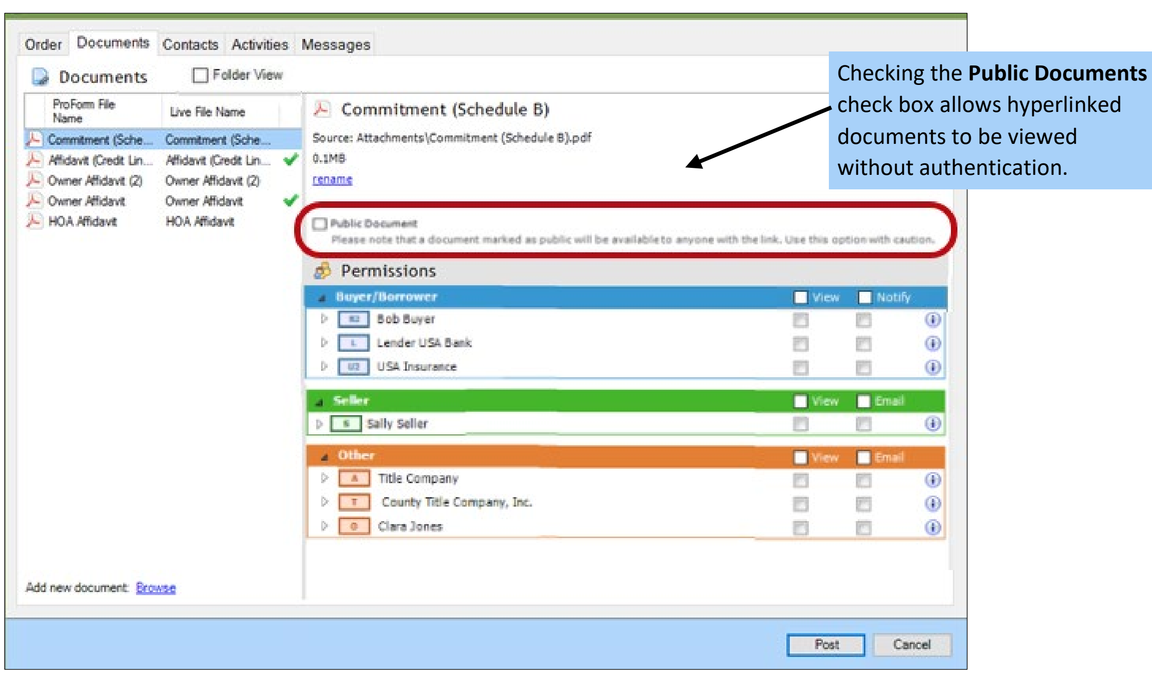
Post a New Document and Share with Your Contacts

1. From the **Documents** tab, click the **Browse** link (bottom left) and navigate to your document.
2. Select the document to add; documents are shown in the list of documents on the left or check the **Folder View** check box to view the same folder view as in your SoftPro order
3. Any rules set in a template are automatically applied to the new document.

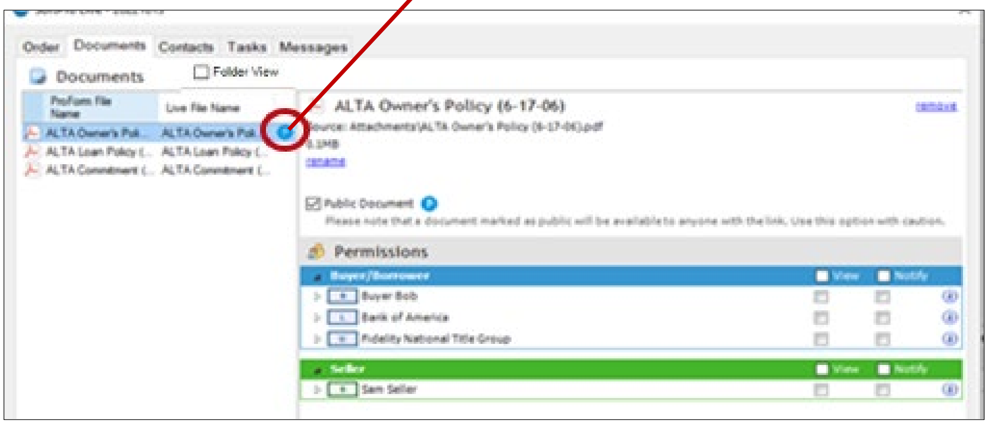
With the document highlighted,

4. Set a document as a **Public Document**. When the user permission is granted, the document can be set to be a **Public Document**.

   This allows a hyperlinked document to be shared with a customer, who then may forward it to a person in their office who is not a contact on the ClosingsLIVE order giving them the ability to view the linked documents without having to authenticate in ClosingsLIVE.



When marked as public, the **Public Document** icon is displayed in the permissions column of the document.



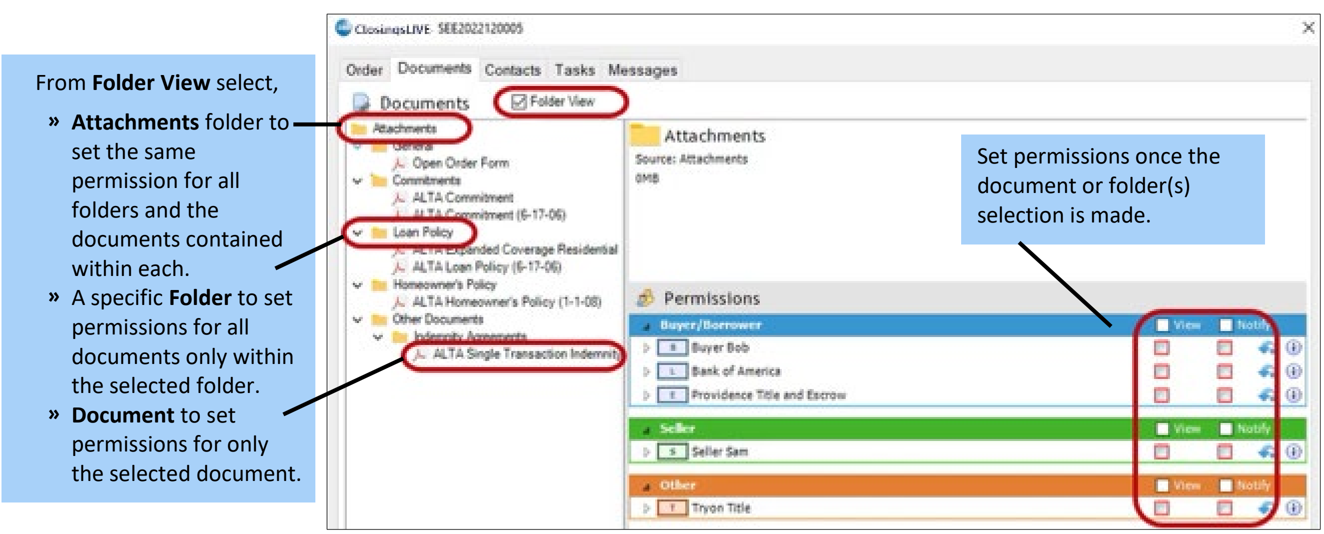
Once the order is published, the **Public Documents** icon changes to green to indicate the document was published as a Public document. If the public document is not permissioned, it is still shared with Live Web so it can be utilized in the Hyperlink Tool.

NOTE:

- There are no changes to permission functionality. Instead of the check icon, the public documents icon is displayed in the permission column.
- Marking a document as a Public Document can only be done manually by a 360 user.
- This change does not affect product templates or select automation.

5. View the **Permissions** grid to change the settings applied from the template.

Permissions can be set by selecting a specific document or check the **Folder View** check box to permission an entire folder of documents.



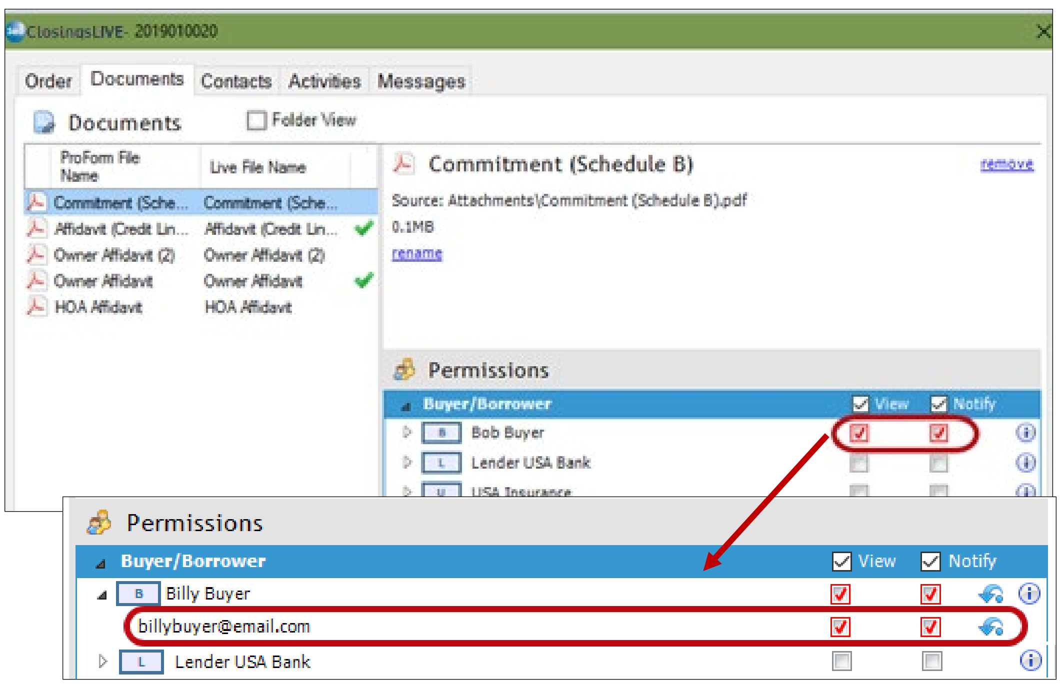
- Permissions can be set at the Contact level (i.e., Lender, Buyer, etc.) or the Contact Person level (i.e., people associated with the Lender).
- Setting at the Contact level (i.e., the Lender), sets the permission for all People associated with the Contact. Click the **Expand** icon next to the Contact name to access the **View** and **Notify** check boxes for the Contact Person and set the permissions individually.

a) To overwrite a permission setting applied from the template,

〉 Contact Level - check the,

» **View** check box to change the view of the document for all people associated with the Contact.

» **Notify** check box to receive email notifications, push notifications via the mobile app, or SMS text notifications when the document is edited for all people associated with the Contact.



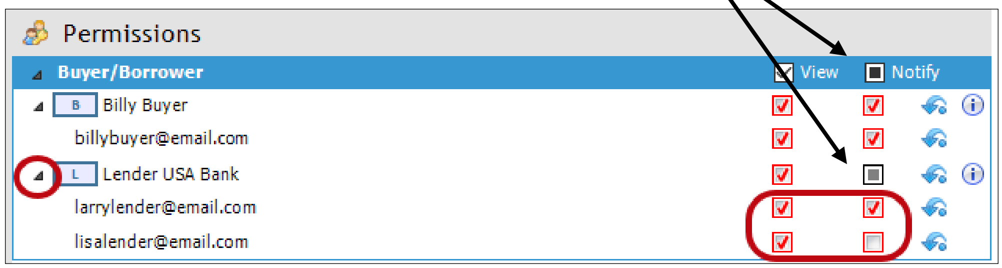
Or-

〉 Contact person level - click the **Expand** icon next to the Contact name and check the,

» **View** check box to change the view of the document for each person.

» **Email** check box to receive email notifications when the document is edited for each person.

NOTE: The **View** or **Notify** check box is shown with a black square when permission is not granted for all people associated with the Contact.



b) Repeat for each document as needed.

Changing a Document

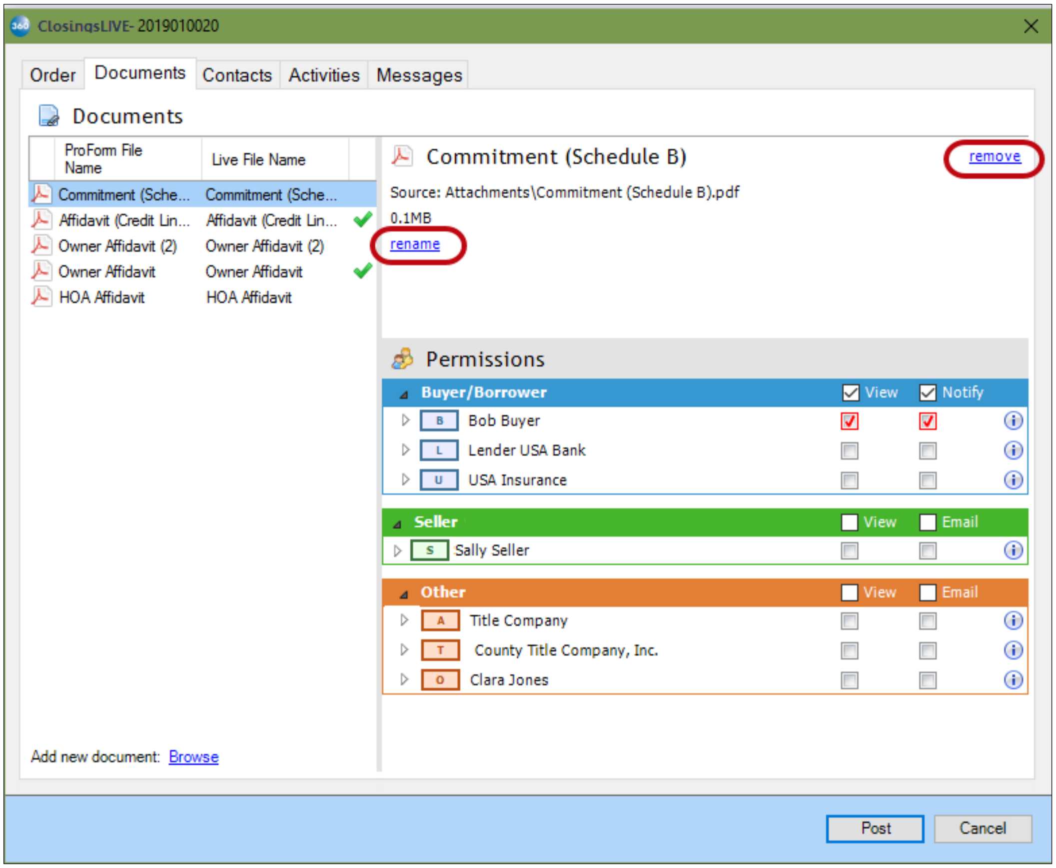
Rename - Select a document from the list on the left and click the **Rename** hyperlink in the summary window. A dialog box opens allowing you to change the name of a document.

Remove - Select a document from the list on the left and click the remove hyperlink in the summary window. The document is removed from the website and cannot be accessed by any contact until it has been reposted.

NOTE: Renaming or removing a document only applies to the ClosingsLIVE website. It does not rename or remove the document in your ProForm order.

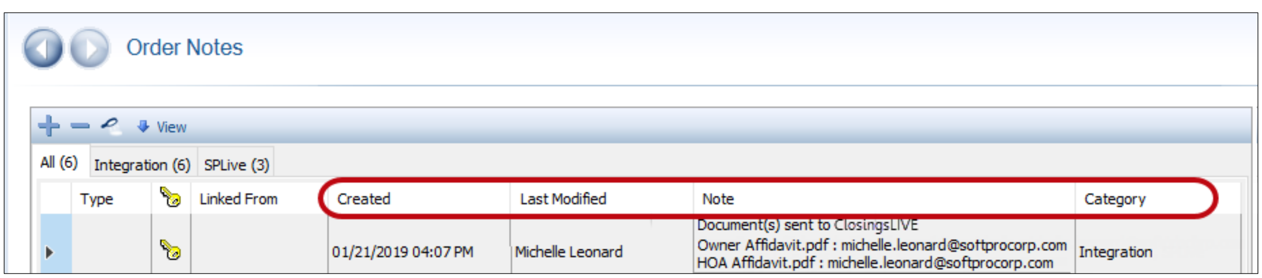
Repost - Once a document has been removed you have the option to repost it.

NOTE: After reposting a document, only the template settings are applied. If you made any changes to the permission settings outside of the template, you must reapply those settings to the reposted document.



Published Documents Written to Order Notes

Documents shared with contacts are captured in the Notes section of the Order with the following information:



- **Created** - Date and time document was published from ProForm to SPLive.
- **Last Modified** - Name of user that published the document.
- **Note** - Name of each document and email address for each recipient of the document.
- **Category** - Integration category is automatically checked for all 360 related notes.

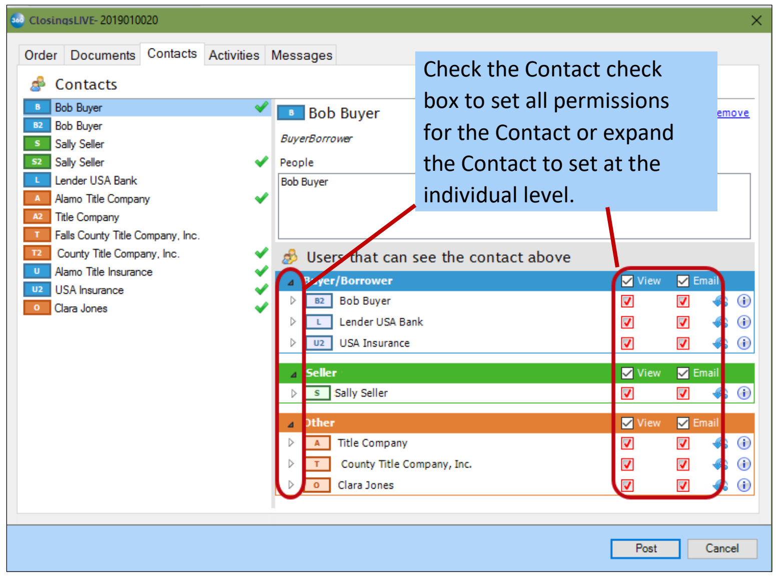
NOTE: If a ClosingsLIVE category exists in SPAdmin, then the ClosingsLIVE category is also checked.

*Standard/Enterprise versions do not incorporate categories for Notes.

Set Up Who Can See Who

With the ClosingsLIVE Administrative Tool you can easily define which contacts can view other contacts by clicking the **Contacts** tab. A list of all the contacts associated with an order are listed on the left. Follow these steps to change who can view a contact.

1. Select a contact from the list on the left. The panel on the right changes based on the contact selected.
2. **View**



   » Check the check box for each contact that may have permission to view the information of the selected contact.

   » Uncheck the check box for each contact that should not view the selected contact.

   For example, it may be unnecessary for the insurance agent to view the contact information of the listing agent. Select the listing agent from the list on the left, go to the permission settings, and uncheck the view option to the right of the insurance agent's name.

3. **Notify** - Check the check box for each contact that should receive a notification (email or push notification via the mobile app) when specific contact's information has changed. For example, if you want the sellers to receive an email when the listing agent's contact information changes, select the listing agent from the list on the left and check the notify check box to the right of the seller's name in the permission grid.

Other Tips:

- **Removing a contact.** When a contact is selected, click the **remove** link in the top right to remove their contact information and name from the ClosingsLIVE Portal. This removes all access for each user from viewing the contact in an order.
  NOTE: The contact is not removed from the ProForm order.

- **Buyer/Seller contact information.** The buyer and seller's contact information are always protected and hidden from all contacts on the ClosingsLIVE portal. Only the buyer's and seller's names appear when viewing an order.

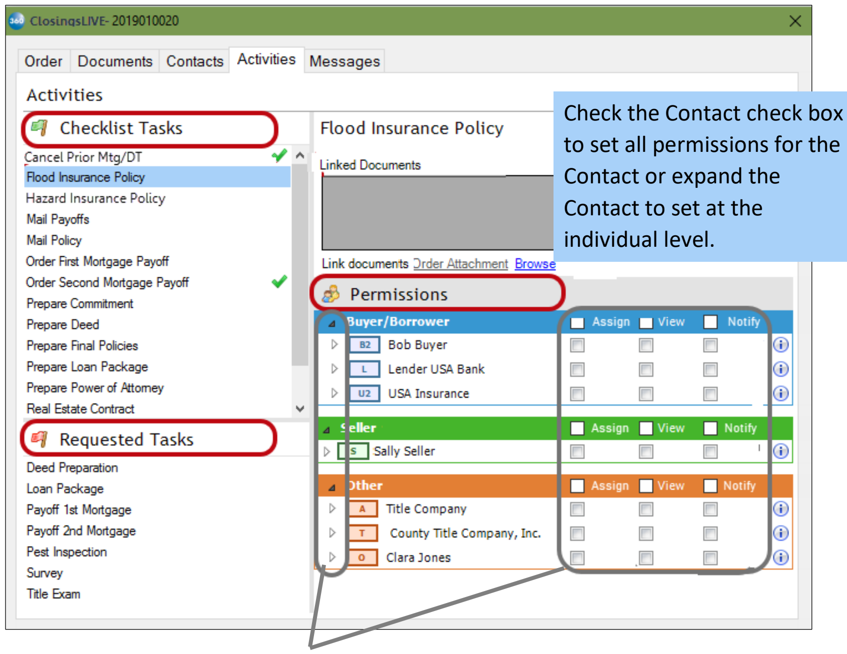
Share a Task

Use the **Activities** tab to share the activities associated with an order to the order's contacts on the ClosingsLIVE Portal.

- **Checklist Tasks** are activities that must be completed for the order to be complete.
- **Requested Tasks** are activities outside of your office that must be completed by third parties associated to the order.

Grant permission settings here for assigning a task to be completed, who can view a task or receive a notification when a task has changed.

NOTE: When granting **Assign** permissions, the **View** and **Notify** permissions are automatically granted to assure the contact has permission to receive the notification and view the task.



NOTE: You can set permissions at the Contact level or for each person associated with the Contact.

Need to associate a document to a task?

Documents can be attached to a task and made available for your contacts to view. Follow the steps below to attach a document:

1. From the **Activities** tab, select a task from the list on the left.
2. Attach a document, use the,
   - » **Order Attachment** link to attach a document already posted to the order.
   - » **Browse** link to navigate to the file on your computer.

   Documents display in the **Linked Documents** grid once linked to a task.

Need to associate an action to a task?

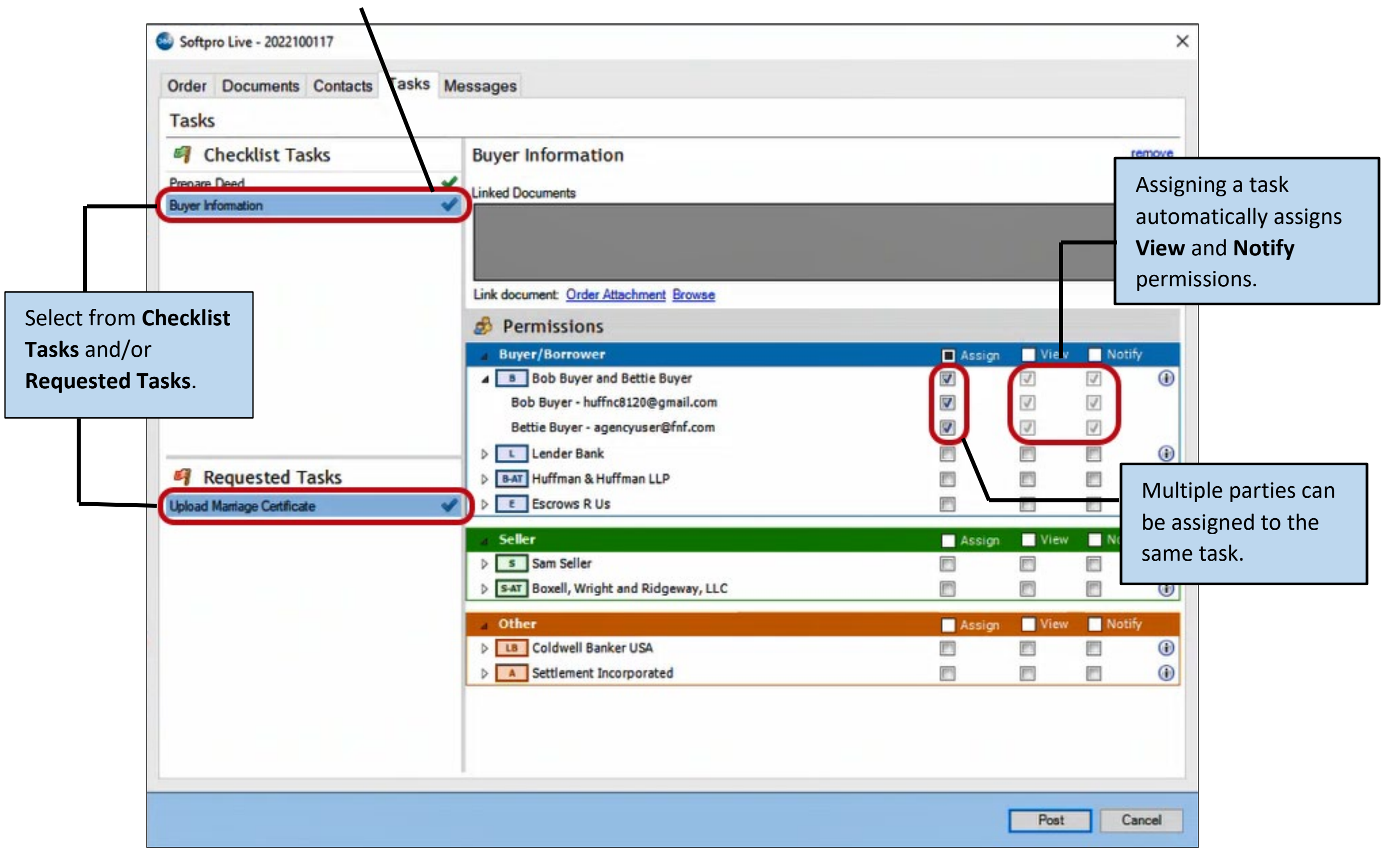
Tasks can be assigned to a contact to complete an action, (i.e., upload a form or complete and submit an online form). When the permission is granted, and the order published, a notification is sent to the recipient requesting the form be uploaded or completed.

To assign task permissions:

1. Select a task from the list on the left; can be a Checklist Task and/or a Requested Task.
2. Check the **Assign** check box for each party you wish to complete the task; multiple parties can be assigned to the same task.

As noted above, when the **Assign** permission check box is checked, the **View** and **Notify** permission check boxes are automatically checked and disabled. The only way to make a change is to uncheck the **Assign** check box.

Once a task is assigned, a check mark is shown next to the Task identifying it as being assigned.



Other Tips

- Use the **Linked Documents** toolbar icons to,
  - » Unlink a document
  - » Rename a document
  - » 3 View or change permission settings of a document linked to a task
- **Removing a task.** When a task is selected, you can click the **remove** link in the top right to remove the task. The task is removed from the ClosingsLIVE portal and cannot be accessed by any contact until it has been reposted.
  NOTE: The task is not removed from the ProForm order.

- **Changing permissions.** With the task highlighted, view the **Permissions** grid to change the settings applied from the template.
  REMEMBER: If a document is attached to the task, permissions are also changed on the document.

  To overwrite a permission setting applied from the template for the corresponding contact,
  a) To overwrite a permission setting applied from the template,
     〉 Contact Level - check the,
        » **Assign** check box to grant permission for all people associated with the Contact to complete an action for that task.
          REMEMBER: Assign permission automatically grants **View** and **Notify** permissions.
        » **View** check box to change the view of the task for all people associated with the Contact.
        » **Notify** check box to receive email notifications, push notifications via the mobile app, or SMS text notifications when the task is edited for all people associated with the Contact.

     -Or-

     〉 Contact person level - click the **Expand** icon next to the Contact name and check the,
        » **Assign** check box to grant permission for all people associated with the Contact to complete an action for that task.
          REMEMBER: Assign permission automatically grants **View** and **Notify** permissions.
        » **View** check box to change the view of the task for each person.
        » **Notify** check box to receive email notifications, push notifications via the mobile app, or SMS text notifications when the task is edited for each person.

     NOTE: The **View** or **Notify** check box is shown with a black square when permission is not granted for all people associated with the Contact.
  b) Repeat for each task as needed.

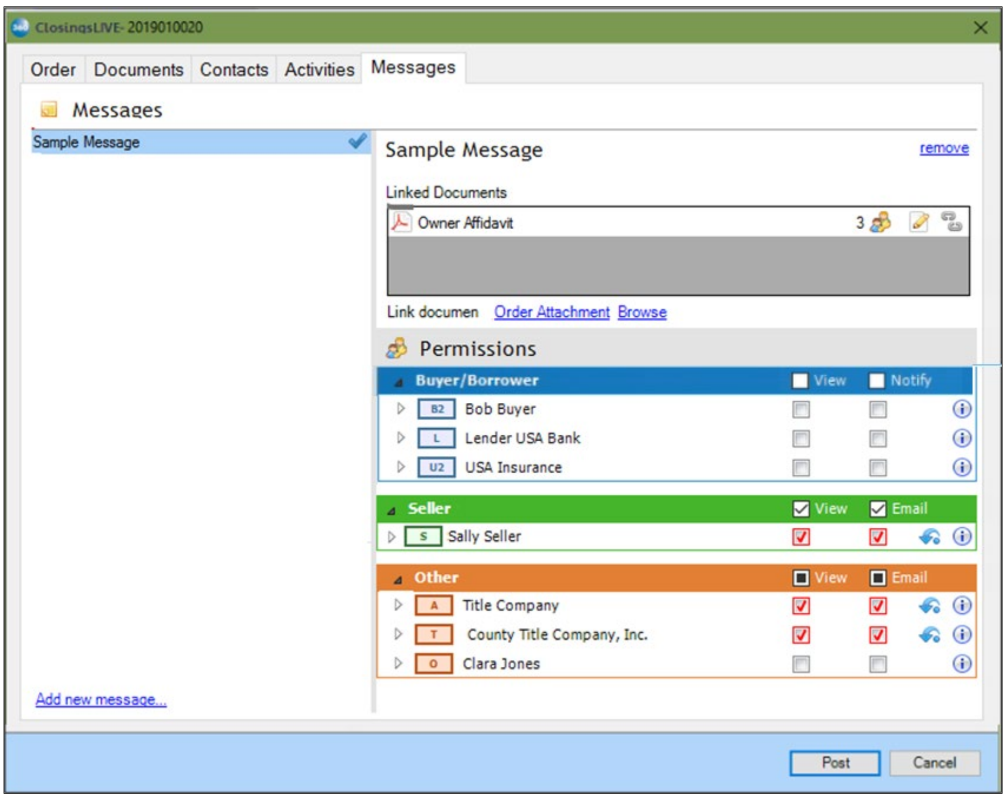
- **Milestone Tasks**. Checklist or requested tasks designated as a Milestone do not show in the **Activities** tab of the ClosingsLIVE Administrative Tool.

Milestone tasks are shared with users based on the **Permission Summary**. When a user is granted permission to view documents, contacts, activities or messages in the order, the user can see the order milestones. Refer to More about Milestones for more information on milestones.

NOTE: The **Milestone Task** feature is included in Select v4.3.28 and above.

Send Messages

Message can be sent to contacts in the ProForm Order from the **Messages** tab. From this tab a message can be added or removed, permissions can be changed for who can view a message or receive an email when a message is modified. Messages can be viewed via the web portal and, if registered, via the mobile app as well.



Add a Message

To add a message to the ClosingsLIVE website,

1. Click the **Add new message** link (bottom left).
2. Enter your message when prompted; press **OK**

The message is added and any permission settings from the template are automatically applied. Posting the order to the ClosingsLIVE Portal, adds your message to your ProForm order Notes. If the ClosingsLIVE category exists in SPAdmin then the Message Note defaults the ClosingsLIVE category as checked.

Read Receipt

When a message is sent, and read by your customer, a transaction is sent back to the 360 Queue. Upon accepting the transaction, the read receipt is appended to the original message in Order Notes.

NOTE: This transaction can be automatically accepted into the order in SoftPro Select using Select Automation rules.

This feature is disabled by default but can be enabled on a customer level in ClosingsLIVE.

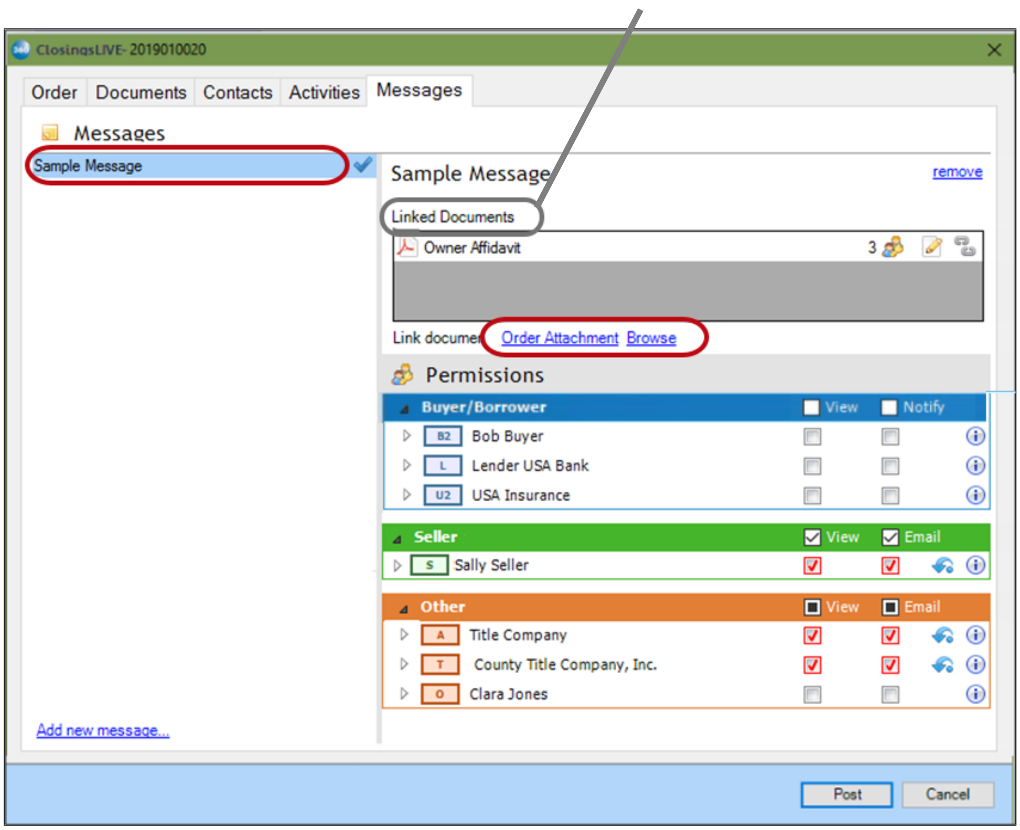
Need to associate a document to a message?

Documents can be attached to a message and made available for your contacts to view. To associate a document to a message,

1. From the **Messages** tab, select a message from the list.

2. Attach a document, use the,
   - » **Order Attachment** link to attach a document already posted to the order.
   - » **Browse** link to navigate to the file on your computer.

   Documents display in the **Linked Documents** grid once linked to a message.



When attaching a document to a message, the document inherits the permissions granted on the message. If the message has **View** and **Notify** permissions granted, the attached document would then have **View** and **Notify** permissions granted.

The permissions on the Document may be manually changed without changing the Message permissions. However, if the permissions are changed on the Message, the attached Document once again inherits the Message permissions.

Other Tips

- Use the **Linked Documents** toolbar icons to,
  - » Unlink a document
  - » Rename a document
  - » 3 View or change permission settings of a document linked to a message
- **Removing a message.** When a message is selected, you can click the **remove** link in the top right to remove the message. The message is removed from the ClosingsLIVE portal and cannot be accessed by any contact until it has been reposted.
  NOTE: The message is not removed from the ProForm order.

- **Changing permissions.** With the message highlighted, view the **Permissions** grid to change the settings applied from the template.
  c) To overwrite a permission setting applied from the template,
    〉 Contact Level - check the,
      - » **View** check box to change the view of the message for all people associated with the Contact.
      - » **Notify** check box to receive notifications when the message is edited for all people associated with the Contact.

    -Or-

    〉 Contact person level - click the **Expand** icon next to the Contact name and check the,
      - » **View** check box to change the view of the message for each person.
      - » **Notify** check box to receive email notifications when the message is edited for each person.

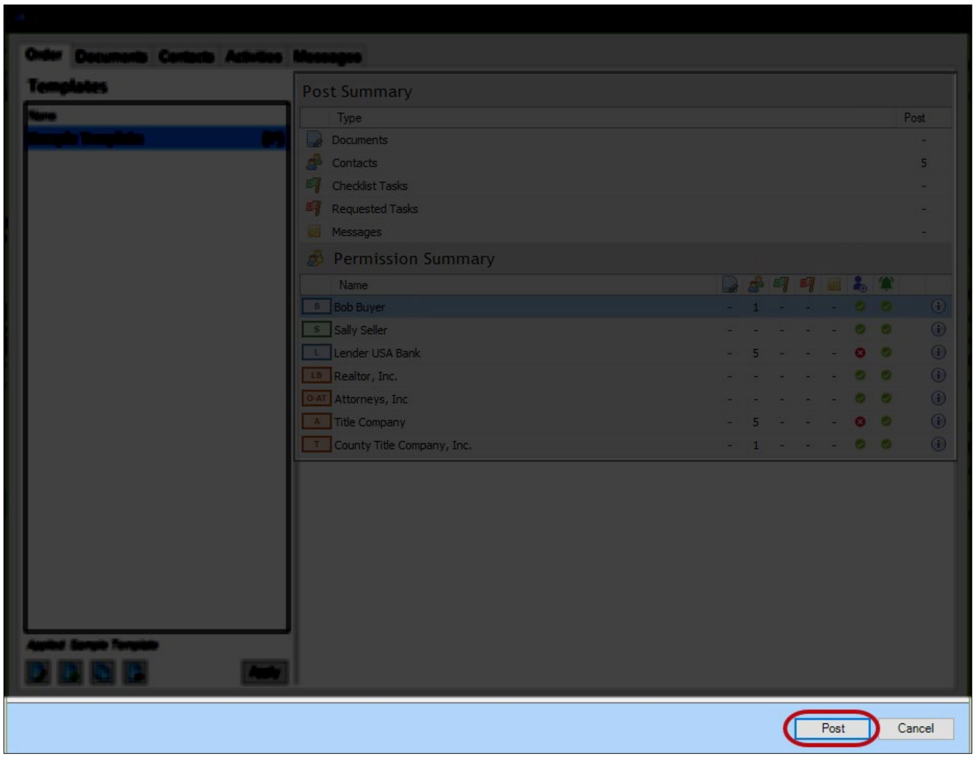
    NOTE: The **View** or **Notify** check box is shown with a black square when permission is not granted for all people associated with the Contact.
  d) Repeat for each task as needed.

- **Enterprise and Standard users only.** Messages do not prepopulate from ProForm to the ClosingsLIVE Administrative Tool. If you would like to share messages, the message must be added separately using the tool. Any message added is added to your ProForm order after posting to ClosingsLIVE.

Ready to Post?

Once the template is applied and the view and email permissions set for all the contacts associated to the order, it is time to Post.

Click the **Post** button to apply the settings and publish the Order on the ClosingsLIVE Portal for your customers.



When the order is posted to ClosingsLIVE, the name and email address of the Escrow Officer/Closer, Title Officer and Escrow Assistant are also published if the information is entered in the SoftPro order. Refer to Messages – Sending/Receiving a Message to the Order Officer for details.

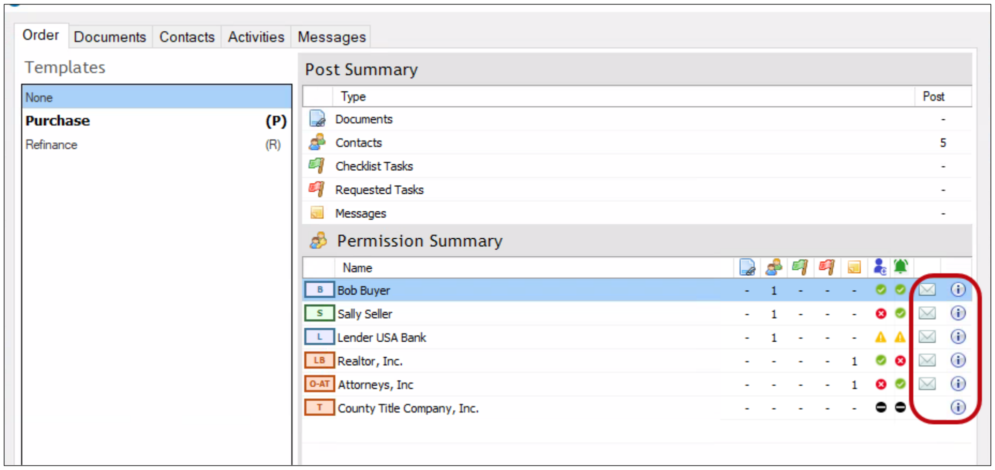
Customers can then log into ClosingsLIVE via the web or mobile app to view the order and you can feel confident the permission settings established in the ClosingsLIVE Administrative Tool grant or restrict your contacts' access to the order information.

More about setting up a ClosingsLIVE account and accessing the portal can be found in the following sections.

Other Tips

- **Notifications.** Once posted, an email notification, push notification and SMS text, if registered, are sent to each contact in the order with a valid email address and permission to view all or part of the order.

  A contact has a valid email address if the **Email** icon shows on the **Order** tab in the **Permission Summary** section or click the **Information** icon.



- **New Users.** New users receive an email invitation to create an account in the ClosingsLIVE Portal after the order has been posted to ClosingsLIVE. They must create an account to log into ClosingsLIVE and view the order information. They can download the mobile app and log in to view order information there as well. The ClosingsLive Mobile App uses the same login credentials as the ClosingsLive Portal.

Additional Information You Should Know

More about Templates

Templates are used to automatically apply permission settings for similar orders. This saves time by limiting the amount of setup work involved in posting an order to the ClosingsLIVE Portal. For each template you can set up rules unique to the template based on several variables including the type of transaction, the type of contacts associated to an order, the type of documents uploaded to ClosingsLIVE, or default contact permissions for specific documents and/or folders.

The ability for users to create, edit, copy or delete templates is set through enabling/disabling product template permissions. Contact SoftPro Support for further details.

Create a New Template

The following steps highlight creating a new template or adding rules to existing templates.

1. From the **Order** tab of the ClosingsLIVE Administrative Tool, click the **New Template** icon in the bottom left of the window.
2. The **Template Editor** window opens. From this window you can name the template and choose an order type to automatically apply the template to.

NOTE: Only one template can be automatically applied to an order type. For example, only one template can be set as the default for Purchase Orders.

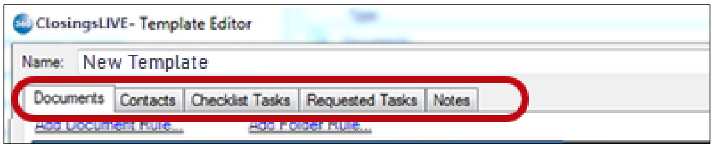
To create a new template that should be automatically applied to a specific order type, open the template that is currently applied to the order type and select **None** from the **Automatically Apply to** drop-down. The previously defaulted order type is now available for selection in the new template.

3. Continue to **Create a Template Rule** if you wish to setup a rule for your new template.

Create a Template Rule

Rules are used to individually define the settings that should be applied to an order when posting to ClosingsLIVE.

The **Template Editor** window shows five tabs corresponding to the types of records viewable in the ClosingsLIVE Administrative Tool: **Documents**, **Contacts**, **Checklist Tasks**, **Requested Tasks**, and **Messages**.



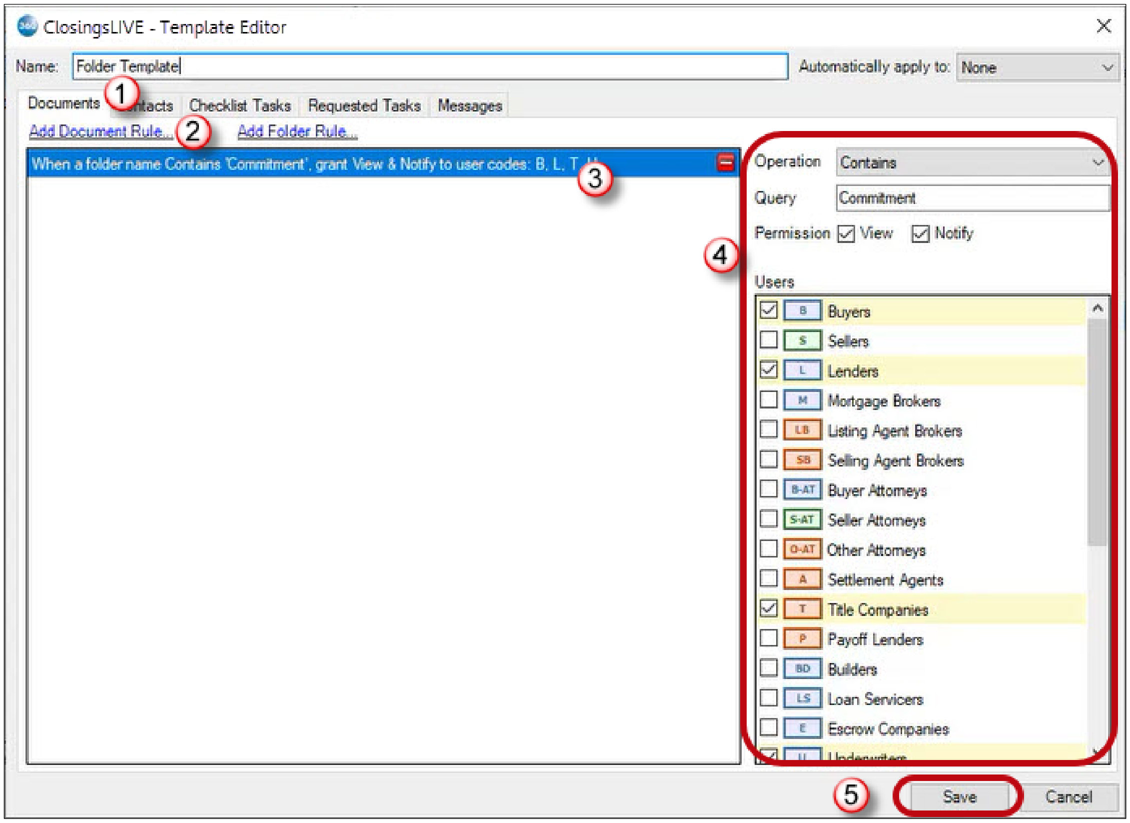
1. Click the tab for the type of record you would like to apply a rule.
2. Click the link directly below the tabs to add a rule.

   For example, when viewing the **Documents** tab, click the,

   » Add Document Rule link to create rules for a specific document. This option allows each document to have different rules applied.

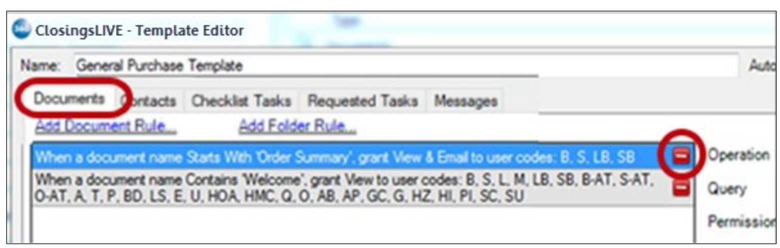
   » Add Folder Rule link to create rules for specific folders. This option allows the rule to be automatically applied to any documents within the folder.

   NOTE: Document and Folder rules can be manually changed once applied.
3. A new row is added in the rule pane. The rule pane lists all the rules associated with the record type for the template.
4. With the new entry highlighted, complete the rule setup using the options to the right.
5. Click **Save** to keep your changes and close the **Template Editor**.



Remove a Template Rule

1. From the **Template Editor**, click the tab to view all the rules for the record type.
2. Highlight the rule you wish to remove.
3. Click the **Delete** icon.



Example: Adding a Document Rule

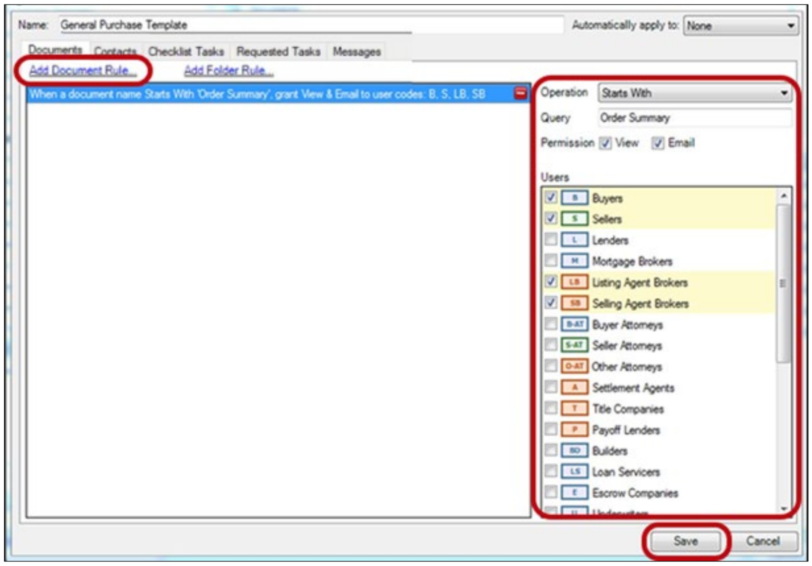
"I want every document that starts with Order Summary to be viewed by the buyer, seller, and their agents. In addition, if I change a document, an email will be sent to them as a notification that something has changed."

From the **Documents** tab

1. Click the **Add Document Rule** link

With the new entry highlighted,

2. From the **Operation** drop-down, select **Starts With**
3. In the **Query** field, enter the name of the document (i.e., Order Summary)
4. Check the **View** and **Email** check boxes so the contacts can view the document and receive a notification when it is changed or is added.
5. Check the corresponding check box for each user that should be given access to view the document and receive the notification.
6. Click **Save**



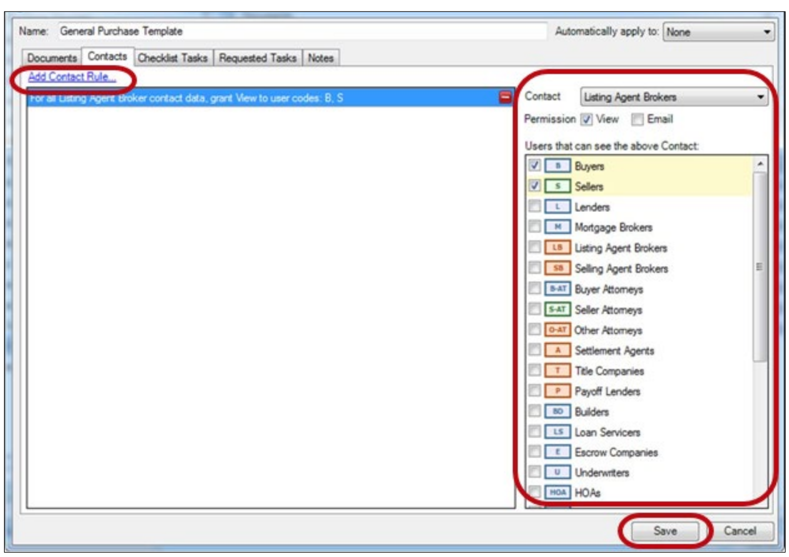
NOTE: The above steps may also be followed when using the **Add Folder Rule**. The rule is then automatically applied to any document or subfolder within the corresponding folder.

Example: Adding a Contacts Rule

"I want both the buyers and sellers to be able to view the contact information for the Listing Agent and receive an email when the agent's contact information is changed."

From the **Contacts** tab,

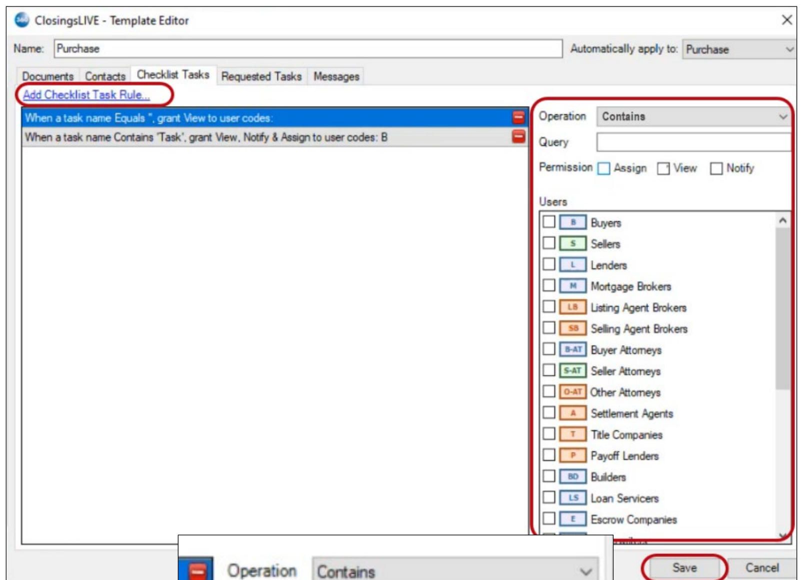
1. Click the **Add Contacts Rule** link
2. From the **Contact** drop-down, select the **Listing Agent Brokers**
3. Check the **View** and **Email** check boxes so the contacts can view the document and receive a notification when it is changed or is added.
4. Check the corresponding check box for each user (i.e., Buyers and Sellers) that should be given access to view the contact and receive the notifications.



5. Click **Save**

Example: Adding a Task Rule

"When I add a Requested Task that contains the word Payoff, I want an email notification to be sent to the Payoff Lender."

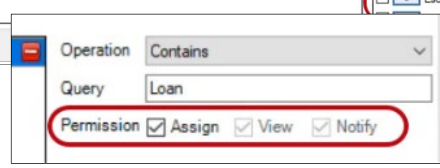


From the **Requested Tasks** tab,

1. Click the **Add Requested Task Rule** link.
2. From the **Operation** drop-down, select **Contains**.
3. In the **Query** field enter the name of the task (i.e., Payoff).
4. Check the, **View** and **Notify** check boxes so the contacts can view the task and receive a notification when it is changed or is added.

-Or-

If a Task requires a document be uploaded or a form completed online, check the **Assign** check box which automatically grants **View** and **Notify** permissions.

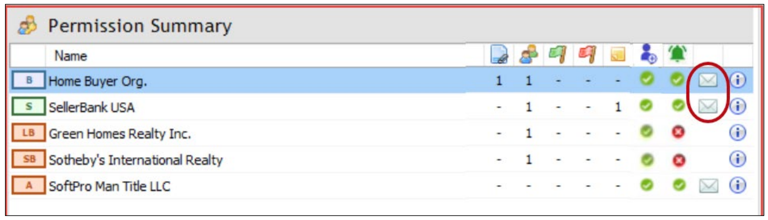


5. Check the corresponding check box for each user that should be given access to view the document and receive the notification.
6. Click **Save**

More about Milestones

Permission to view a Checklist Task or Requested Task designated as a Milestone cannot be set by checking the **View** or **Email** check box as is done with record types (i.e., Documents, Contacts, Activities or Messages). Milestones are shared with any user who has been granted permission to any record type (Documents, Contacts, Activities or Messages). Milestones are pushed to the Mobile App when two or more tasks are identified as milestones.

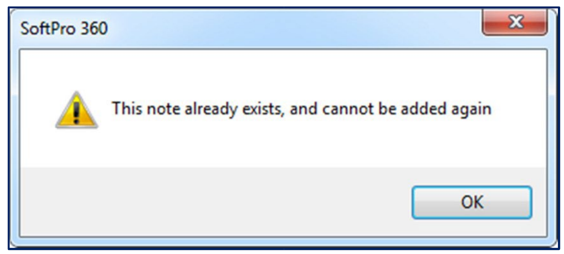
From the **Orders** tab, users see basic transaction information and Milestones are part of this information. When a user is granted permission to receive a notification to any record type, the user is notified of a Milestone when the task status is marked **Completed** or **Received** and the order is posted to ClosingsLIVE.



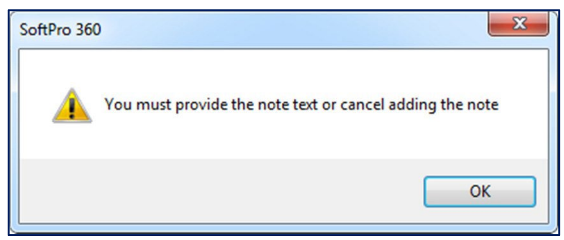
As an example, a Checklist Task designated as a Milestone is marked **Completed** or **Received** and the order posted to ClosingsLIVE. Based on the **Permission Summary**, the Buyer and Seller would receive an Order Update notification, but the Listing Agent and Selling Agent would not. They can only see the updated Milestone the next time they log into ClosingsLIVE to view the order.

Troubleshooting

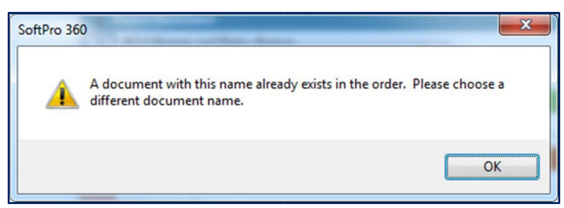
Duplicate Message. You cannot create a duplicate message in the ClosingsLIVE Administrative Tool.



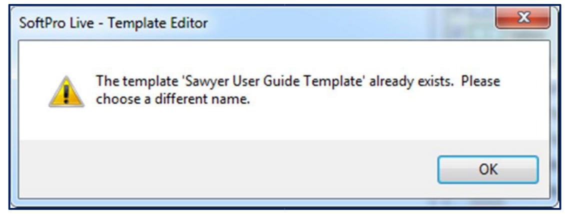
Blank Message. You cannot create an empty message in the ClosingsLIVE Administrative Tool.



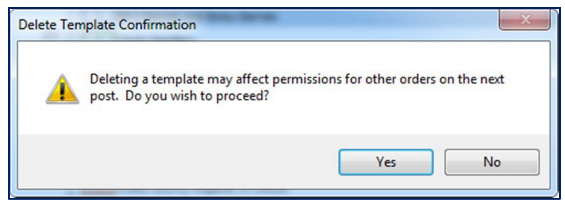
Duplicate Document Name. You cannot rename a document with the same name of a document that already exists.



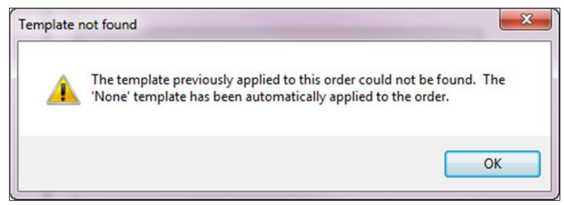
Duplicate Template Name. You cannot rename a template with the same name of a template that already exists.



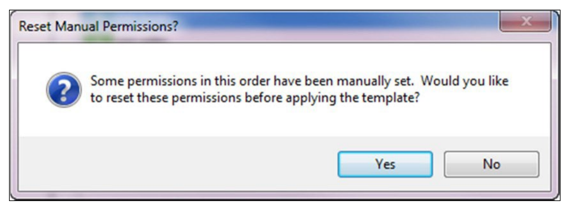
Deleting a Template. Deleting a template affects all orders associated to the template. Removing it defaults all orders associated to the template to **None**. Any user-applied settings are erased.



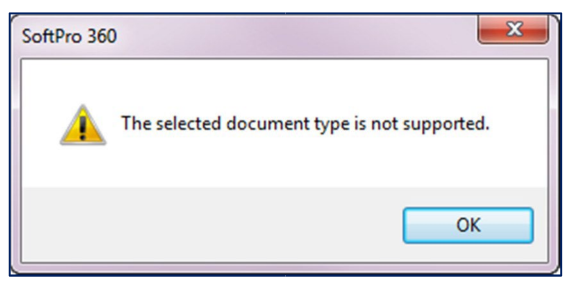
Template Not Found. If a user opens an order that had a template applied that was deleted, the user receives a warning message alerting them that the template is not found.



Reset Manual Permissions. When the user applies a template to an order with manually modified permissions, the user receives a message to reset manually set permissions before applying the template. Clicking **Yes**, all manually set permissions are removed; **No**, all manually set permissions are saved.



File Type Not Supported. Only supported file types can be uploaded to ClosingsLIVE.



File type extensions of documents supported in ClosingsLIVE.

.asc	.bmp	.doc	.docx	.dotx	.docm	.dotm	.eps	.fnm
.gif	.ics	.jp2	.jpe	.jpeg	.jpg	.pct	.pdf	.pic
.pict	.png	.ppt	.pptx	.potx	.ppsx	.ppam	pptm	.potm
.ppsm	.ps	.rtf	.rtx	.tif	.tiff	.tr	.txt	.xht
.xls	.xml	.xlsx	.xltx	.xlsm	.xltm	.xlam	.xlsb	.xps

Your Customers View to Order Information

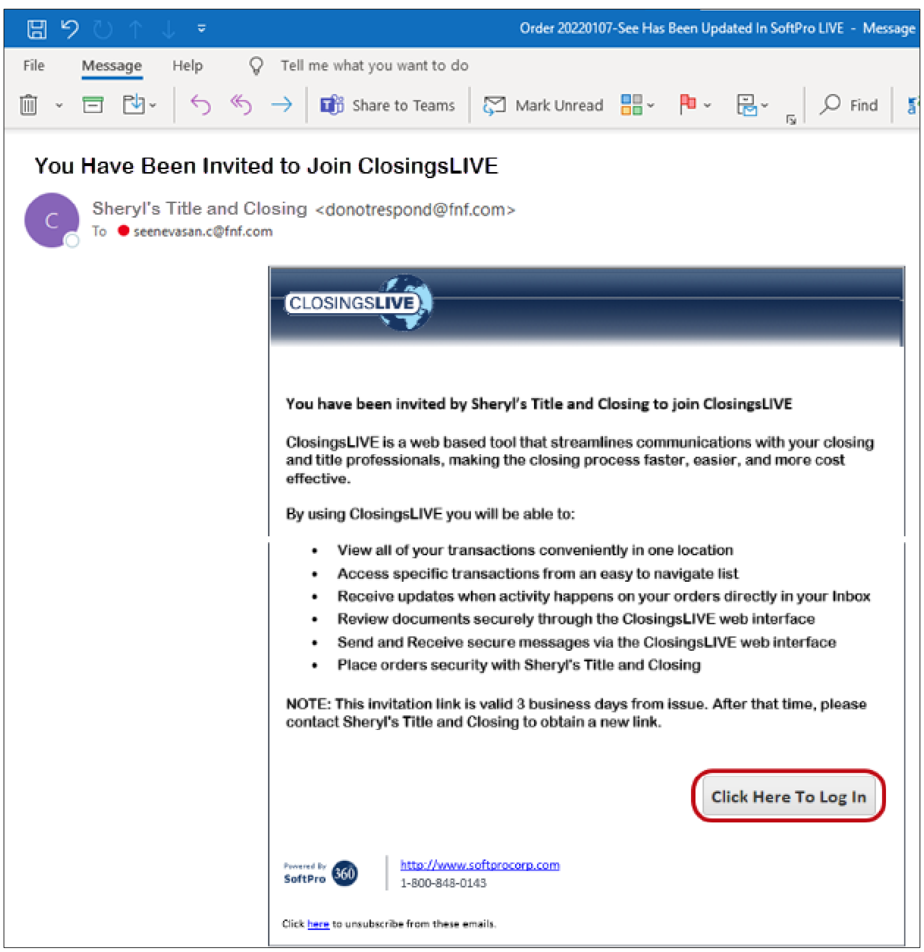
Once you have posted an order to the ClosingsLIVE Portal, each contact with a valid email address receives an email notifying them to log into ClosingsLIVE either via a web browser or the mobile application to view the order.

To access the ClosingsLIVE Portal, the contact can click the link in the email or open an Internet Browser and enter https://ClosingsLive.com in the URL address. Customers may also download the mobile application from the AppStore.

First Time Users

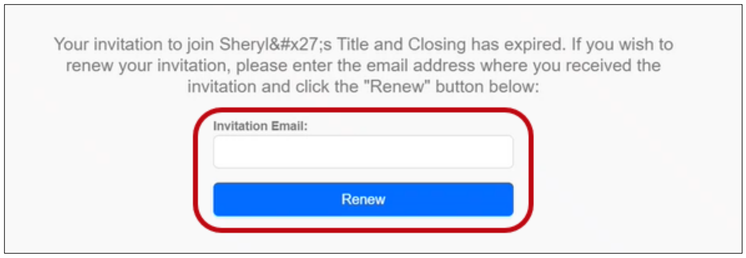
New customers who have not previously used ClosingsLIVE receive an email invitation to create their own account. The email provides a link to create an account with a password. Once created, they are immediately logged into ClosingsLIVE.

NOTE: Passwords are case sensitive.

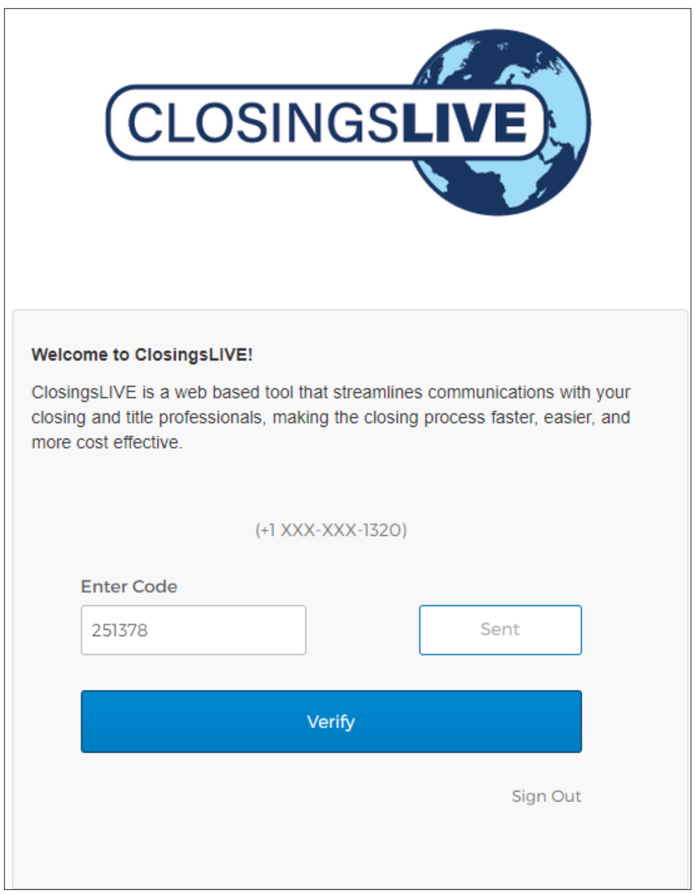


The link provided in the invitation email only remains active for 72 hours. If the expiration time has elapsed, the customer can renew the invitation by clicking the **Click Here To Sign Up** button. Instead of proceeding to account setup, they are directed to enter the email address the invitation was sent to and click the **Renew** button.

There are up to three opportunities to enter the invitation email address. After the third attempt, the customer is directed to contact the Title, Escrow or Settlement Agent office to obtain a new link.



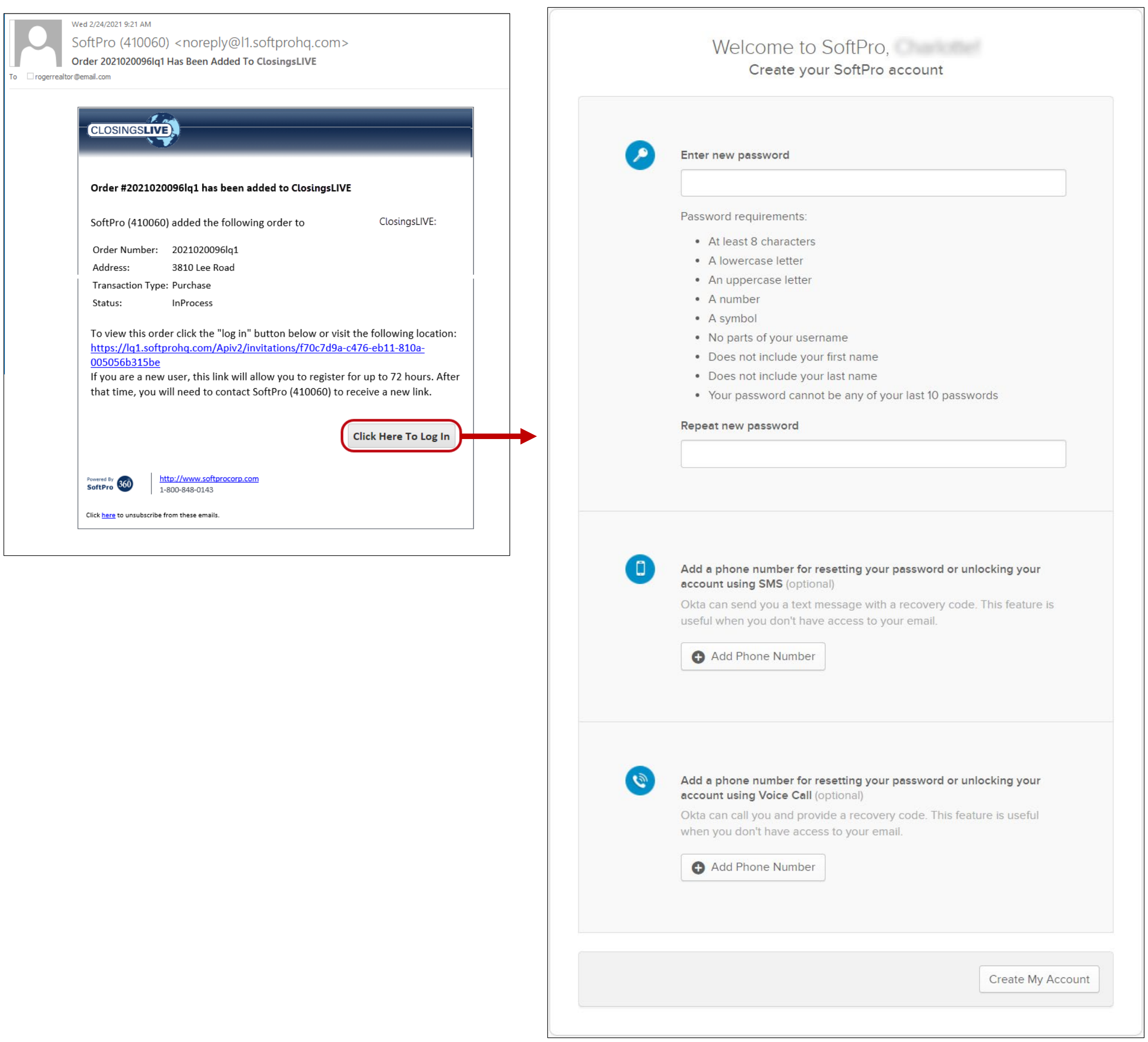
This initiates an email with a six-digit verification code and a message is displayed indicating the code was sent. Once the code is entered, they are then directed to verify and proceed with setup.



The verification code expires five minutes after being issued. There are up to three opportunities for verification. After the third attempt, the customer is directed to contact the Title, Escrow or Settlement Agent office to obtain a new link.

To send the email to first time users: Set up the contact in ProForm with a valid email address and use the ClosingsLIVE Administrative Tool to give the contact access to the appropriate areas of ClosingsLIVE. When posted in the ClosingsLIVE Administrative Tool, an email is automatically sent to instruct the user how to set up an account and access the portal.

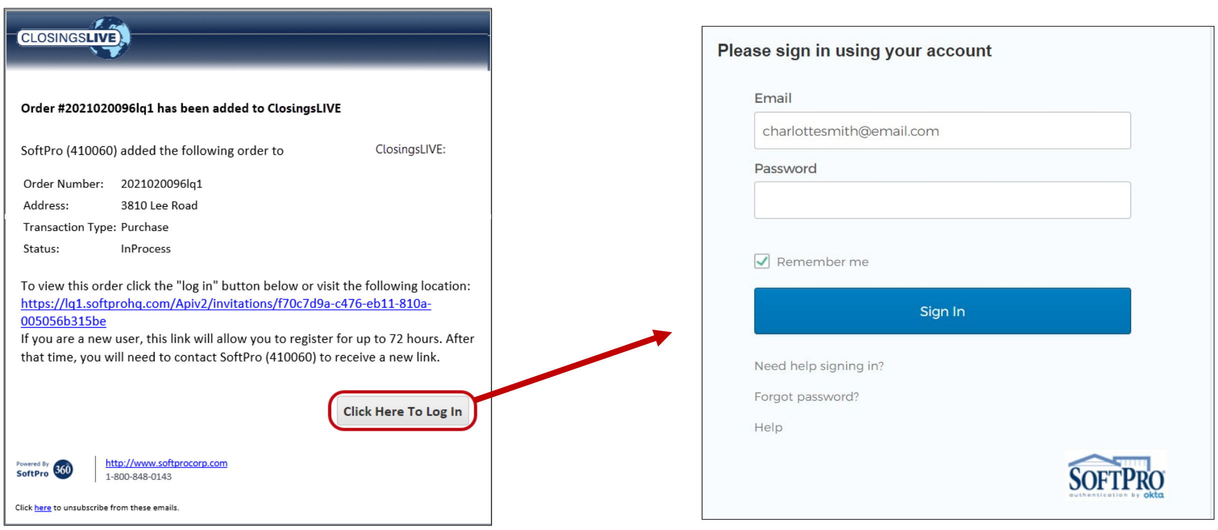
When they click the **Click Here To Log In** button in the email, they are prompted to enter information to create their account.



NOTE: If your website is configured to use the Multi-Factor Authentication (MFA) when logging in, refer to the section, ***Setting Up Multi-Factor Authentication (MFA)***, for instructions on setting up verification options.

Existing Users

Customers who already have a ClosingsLIVE account receive an email notification, a push notification via the mobile app, and a SMS text, if registered, when an order has been posted or updated. The link provided opens an internet browser and prompts the user to log into ClosingsLIVE.



- Users who forgot their password may click the **Forgot password** link on the Log In screen.
- Users who forgot their username may use the email address associated to the contact record in the ProForm Order to log into ClosingsLIVE.

NOTE: If your website is configured to use the Multi-Factor Authentication (MFA) when logging in, refer to the section, ***Setting Up Multi-Factor Authentication (MFA)***, for instructions on setting up verification options.

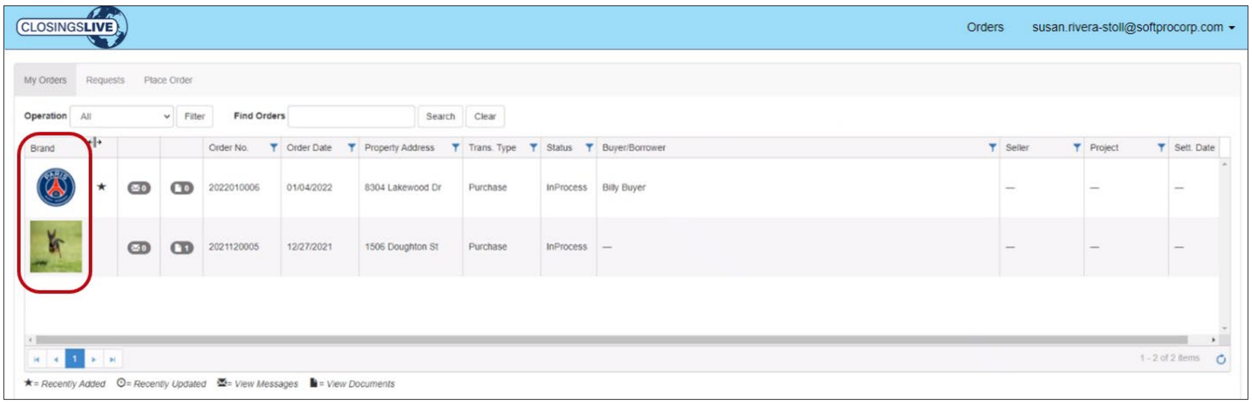
Viewing Orders on ClosingsLIVE

Once a user is registered with ClosingsLIVE, they have the option of viewing orders by logging into the ClosingsLIVE Portal or the ClosingsLIVE Mobile Application. The following provides an overview of each method.

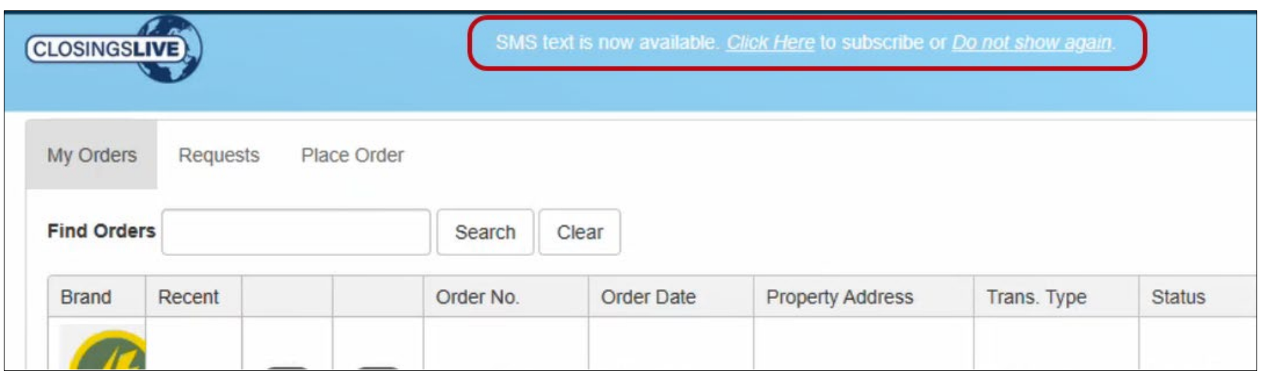
ClosingsLIVE Portal

After a user logs into the ClosingsLIVE Portal, they have access to all the orders associated with their email address and have been granted permission to view.

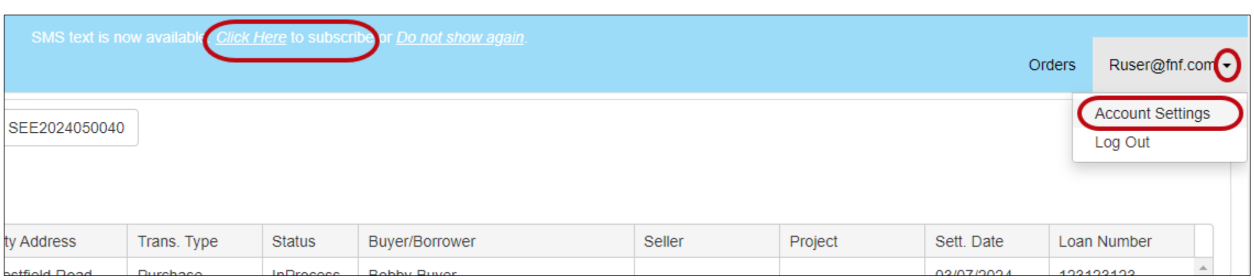
If a customer works with another user or company that also utilizes SoftPro ProForm, these orders are listed on the site as well. Each order is shown with their Brand logo and color based on the client setup.



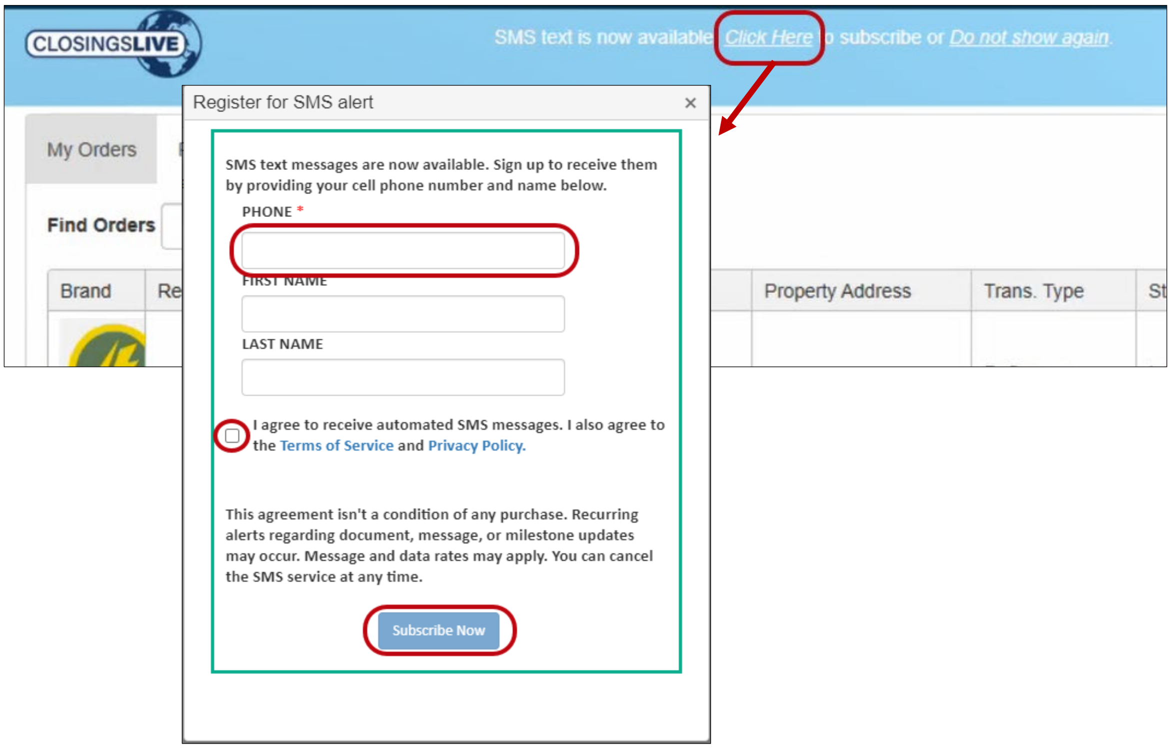
SMS Text. If SMS Text Alerts have been enabled for the user's company, the ***SMS text is now available. Click Here to subscribe or Do not show again*** message is displayed in the banner. The user can opt to register by clicking the **Click Here** link or no longer display the message by clicking **Do not show again** link.



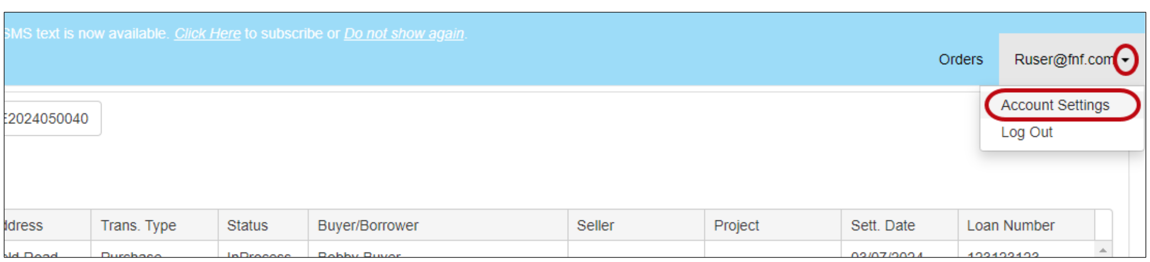
Registering for SMS Text Notifications. A user has two options to register for text alert messages. They can register via the **Click Here** option in the displayed message cited above or by accessing their **Account Settings** and selecting the **Preference** tab.



- Using the **Click Here** link immediately opens the **Register for SMS alert** window. Enter the pertinent information. The **Subscribe Now** button becomes active once the required information (**Phone**) is entered and the user agrees to the **Terms of Service** and **Privacy Policy**. Click the Subscribe Now button to complete the registration.

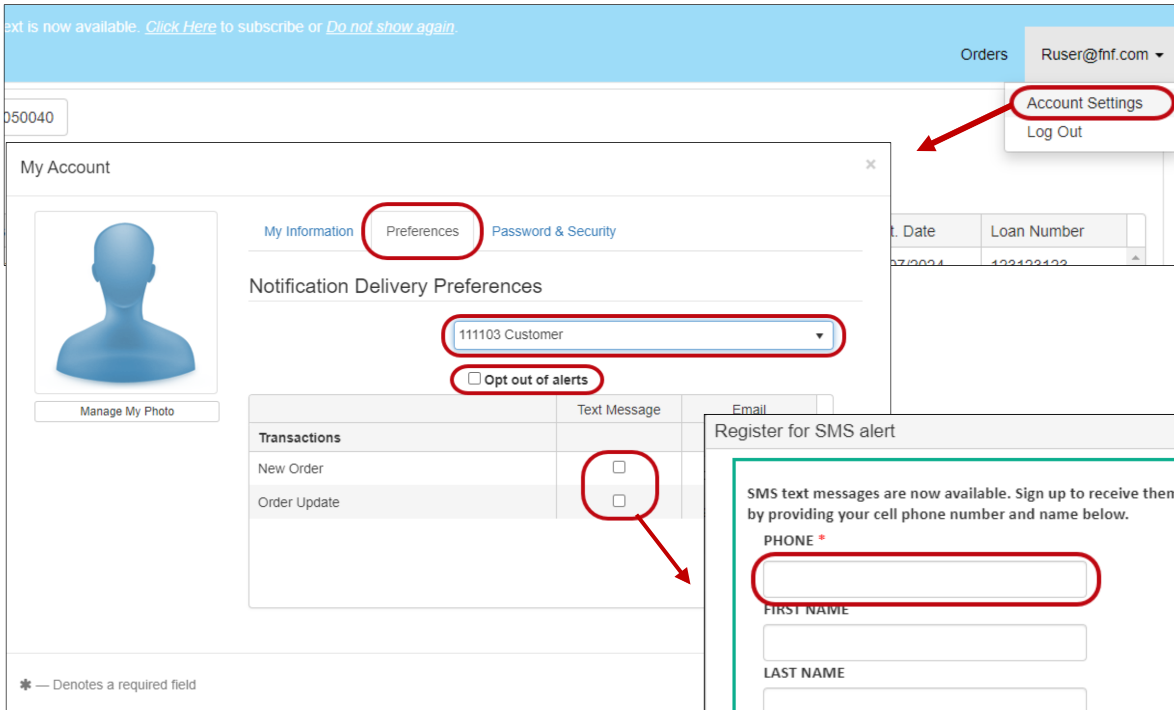


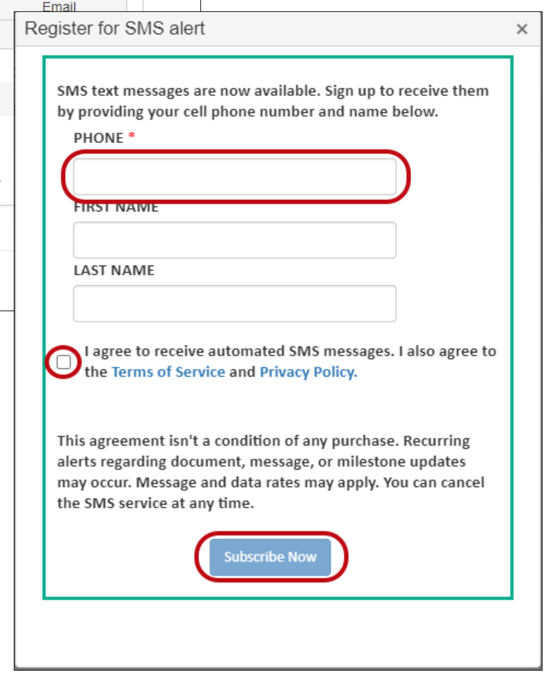
- Using the **Account Settings > Preference** tab. From this screen, the user can,



  - Select the **Customer** (f they receive notifications for more than one company) to set their notification preference for that customer.
  - **Opt out of alerts** – this disables all notifications (email or text)
  - Select which notifications are received by type, (**Text Message** and/or **Email**) and by **Transactions** (**New Order** and/or **Order Update**) by checking the corresponding check boxes.

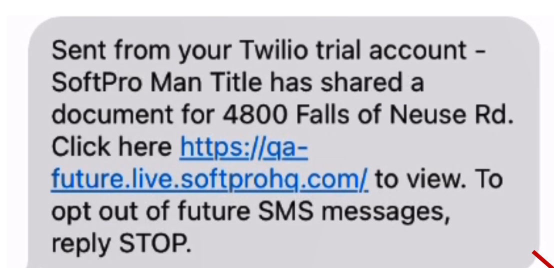
NOTE: **Text Messages** can only be set for customers that have enabled the feature. If the feature is not active, the check boxes are not enabled.





If a user has not yet registered for **Text Messages**, once a check box is selected (for either **New Order** or **Order Update**), the **Register for SMS alert** window opens. The user can then enter the pertinent information and click the **Subscribe Now** button to complete their registration.

Once registered, when an order is added, updated or documents sent, a text message is sent to the phone number entered in the **Account Settings** indicating the action occurred citing the company name, the property address and providing a link to the web portal.

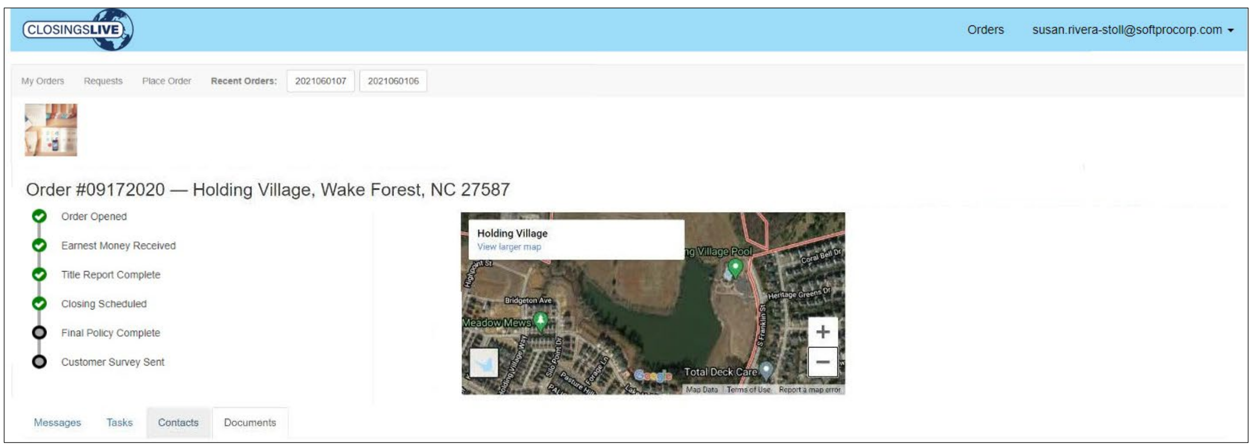


Working in ClosingsLIVE

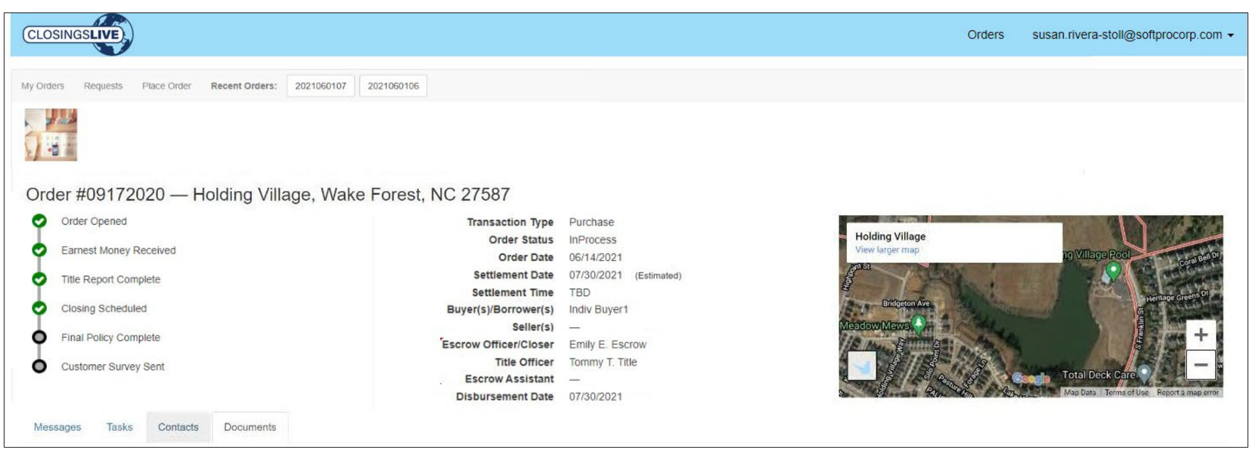
Searching for Orders. When search criteria is entered in the **Find Orders** field, the application searches across all columns on the screen. If the search criteria is found, the orders are filtered to show only those that match the criteria. Clicking the **Clear** button returns the full list.

View an Order. Click **View** to open an Order in a new tab. Here they can view all the information about the order including the address, order date, names of the buyer, seller, escrow officer/closer, title officer and escrow assistant as well as milestones if the feature is in use.

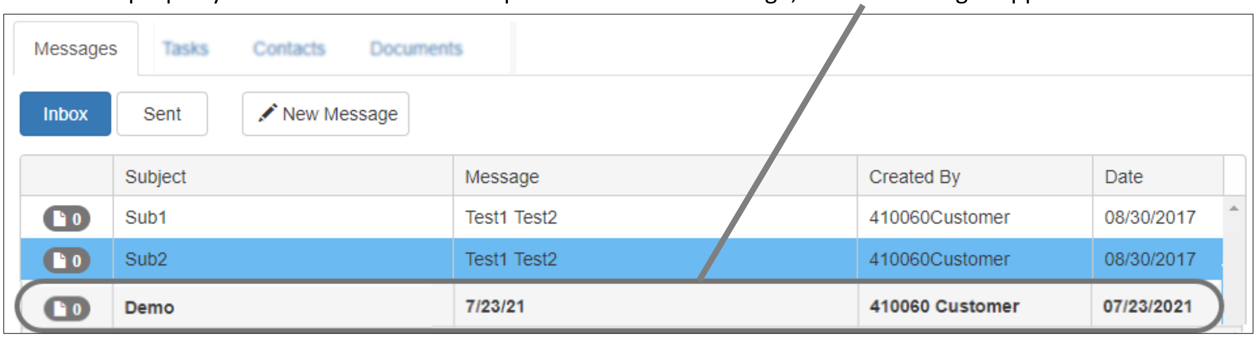
View of orders with no tasks set as milestones.



View of an order with tasks set as milestones.

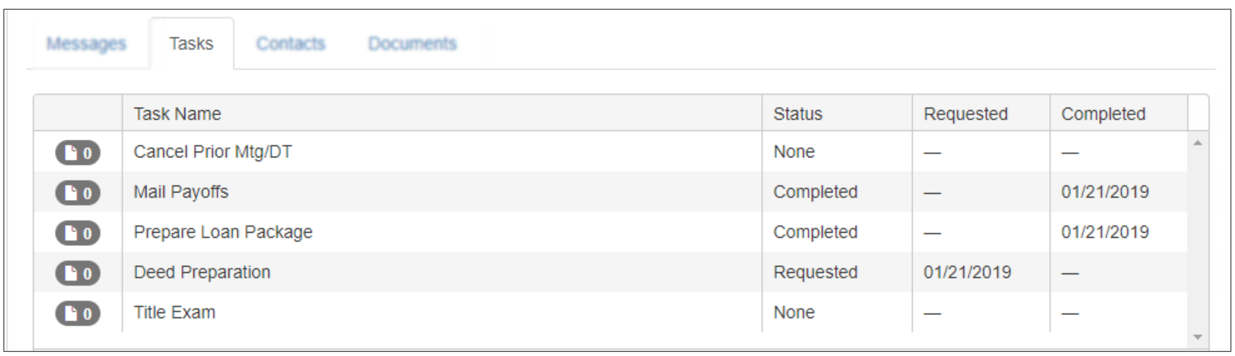


View Messages. Users can view messages associated with an order from the tab section below the Google Map view of the property's address. Click **View** to open and view the message; unread messages appear in **bold** font.

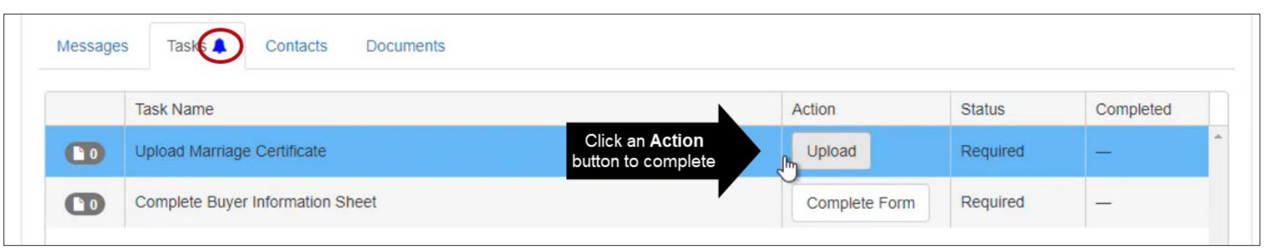


Contacts may only view an activity in which they have been granted **View** access from the ClosingsLIVE Administrative Tool.

View Tasks. Users can view Tasks associated to an order from the tab section below the Google Map view of the property's address. Click **View** to open any documents associated to the tasks. Contacts may only view an activity in which they have been granted **View** access from the ClosingsLIVE Administrative Tool.



If an action was assigned to a task, upload a form or complete an online form, the Tasks tab shows a Task badge with the number of items awaiting action.

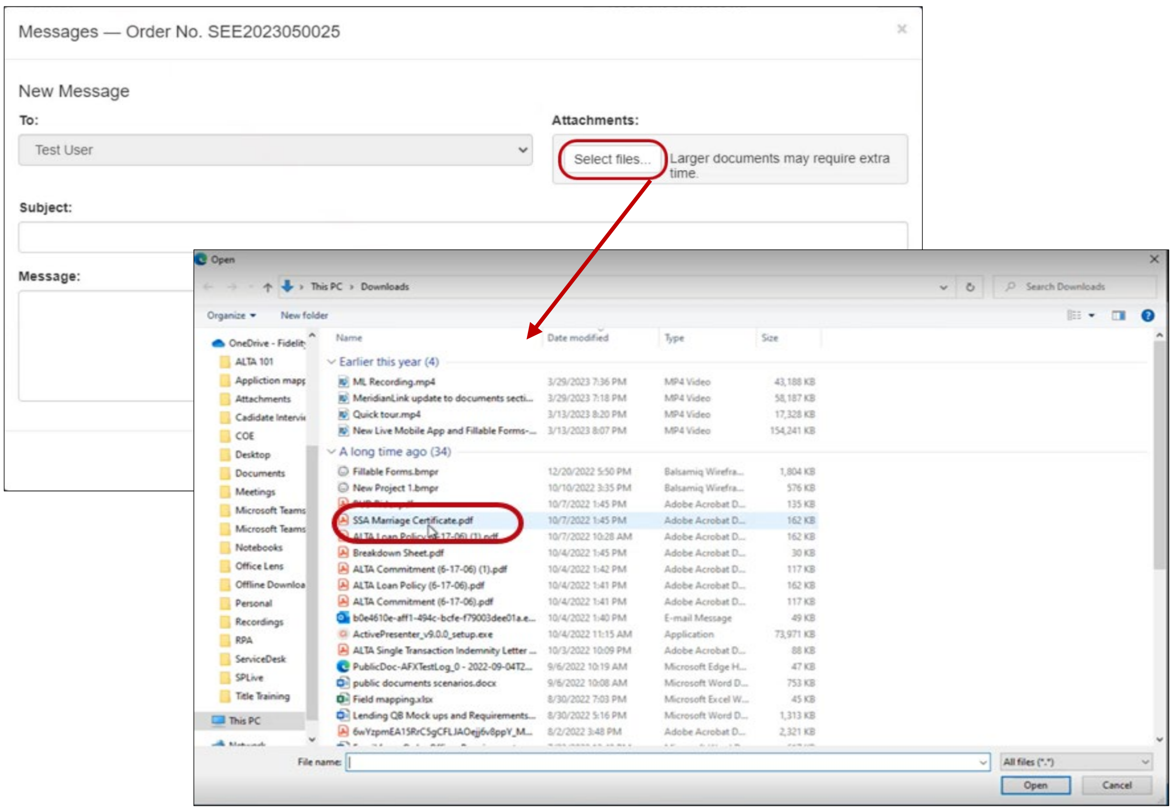


Click the **Action** button, **Upload** a form or **Complete Form**, associated with the Task to complete.

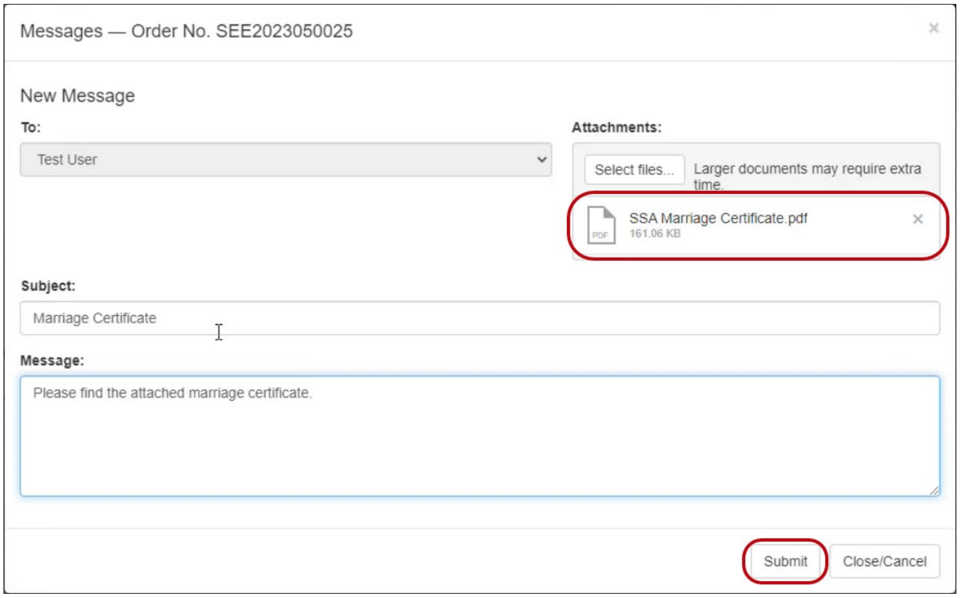
If the **Action** is,

- **Upload**, the program opens to the **Messages** window. This allows you to attach a file to upload and respond via email. The message is addressed to the party that sent you the message by default.

  Click the **Select files** button to navigate out to the folder where the document is stored. Double-click the document (or highlight and select Open to select the document).



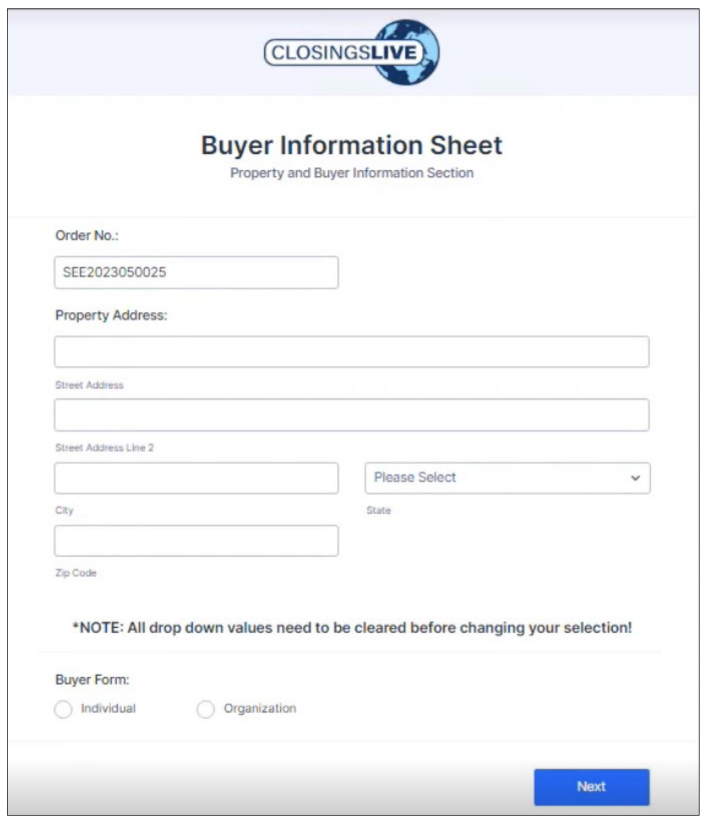
Once the document is uploaded, continue to enter your message. The recipient defaults to the party that sent the message to you. Click the **Submit** button to send.



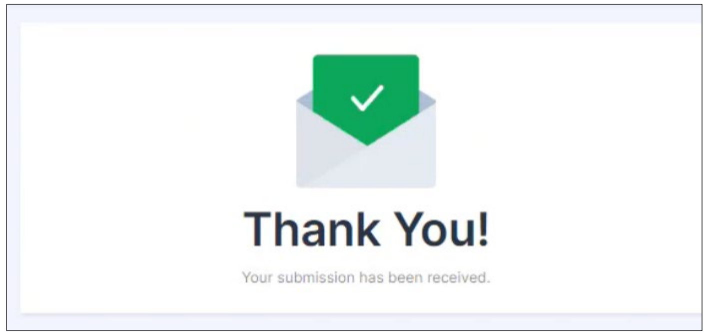
- **Online Form,** the program opens the associated online form in the default browser window allowing the recipient to enter the necessary information. Click the **Next** button to continue through the form.

  NOTE: No fields are set as required by default.

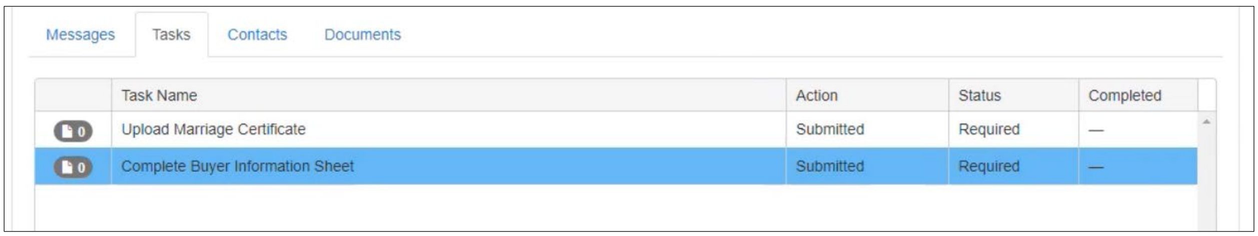
  Forms vary in length, so continue to click the **Next** button until the **Submit** button is shown (on the last page). Once the information is entered, click the **Submit** button to send the completed form.



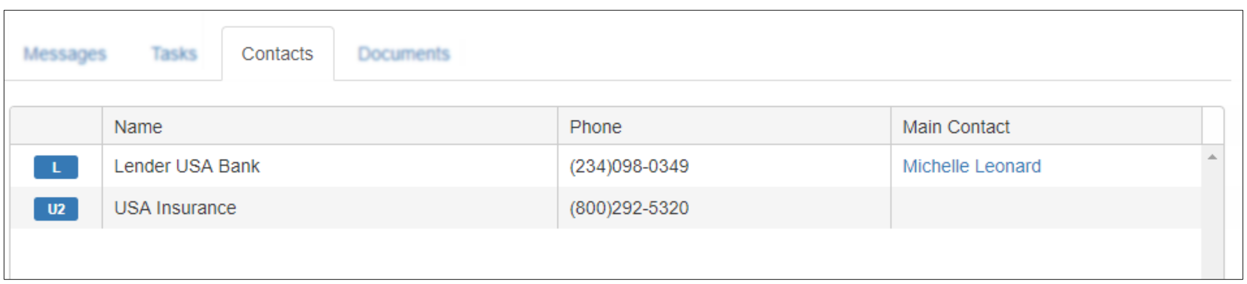
Once the form is submitted, the **Thank You** message is displayed confirming submission.



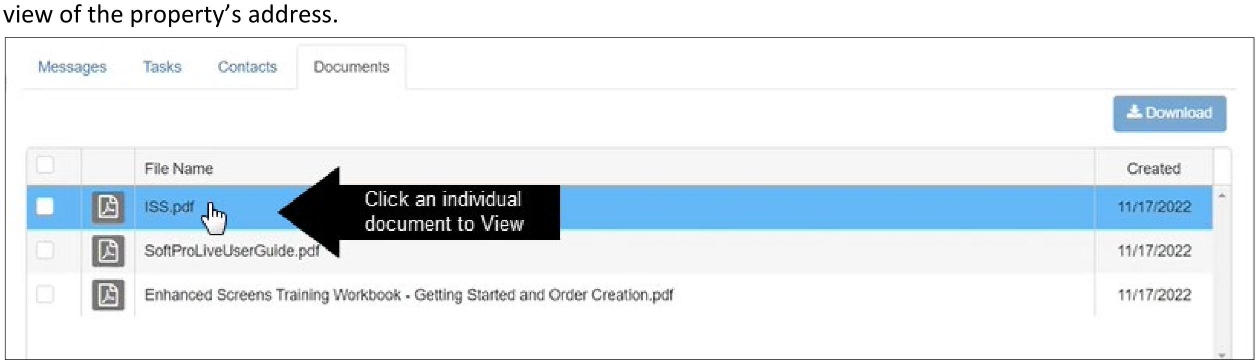
The **Tasks** tab no longer displays the badge icon and the **Action** status has changed to **Submitted**.



View Contacts. Users can view contacts associated to an order from the tab section below the Google Map view of the property's address. Expand the contact or click **View** to view additional information about the contact for this order. Contacts may only view other contact information in which they have been granted **View** access from the ClosingsLIVE Administrative Tool.

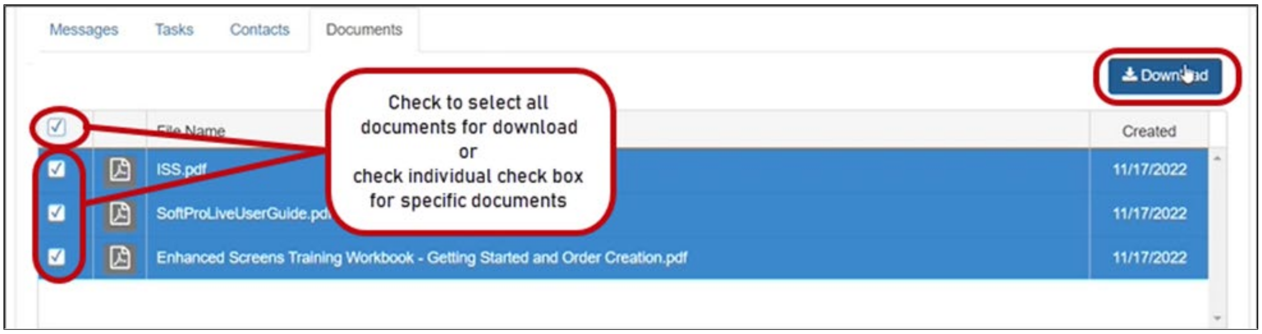


View documents. Users can view documents associated to an order from the tab section below the Google Map view of the property's address.



Check the corresponding check(es) of the document(s) you wish to download to the local computer. You can also check the **All documents** check box to download all documents at one time. Once the documents are selected, click the **Download** button to proceed.

When an individual document is downloaded, the file is saved as the original file type (i.e., pdf, doc, etc.). When multiple documents are downloaded, the file is saved as a zipped file.
Contacts may only view documents in which they have been granted **View** access from the ClosingsLIVE Administrative Tool.



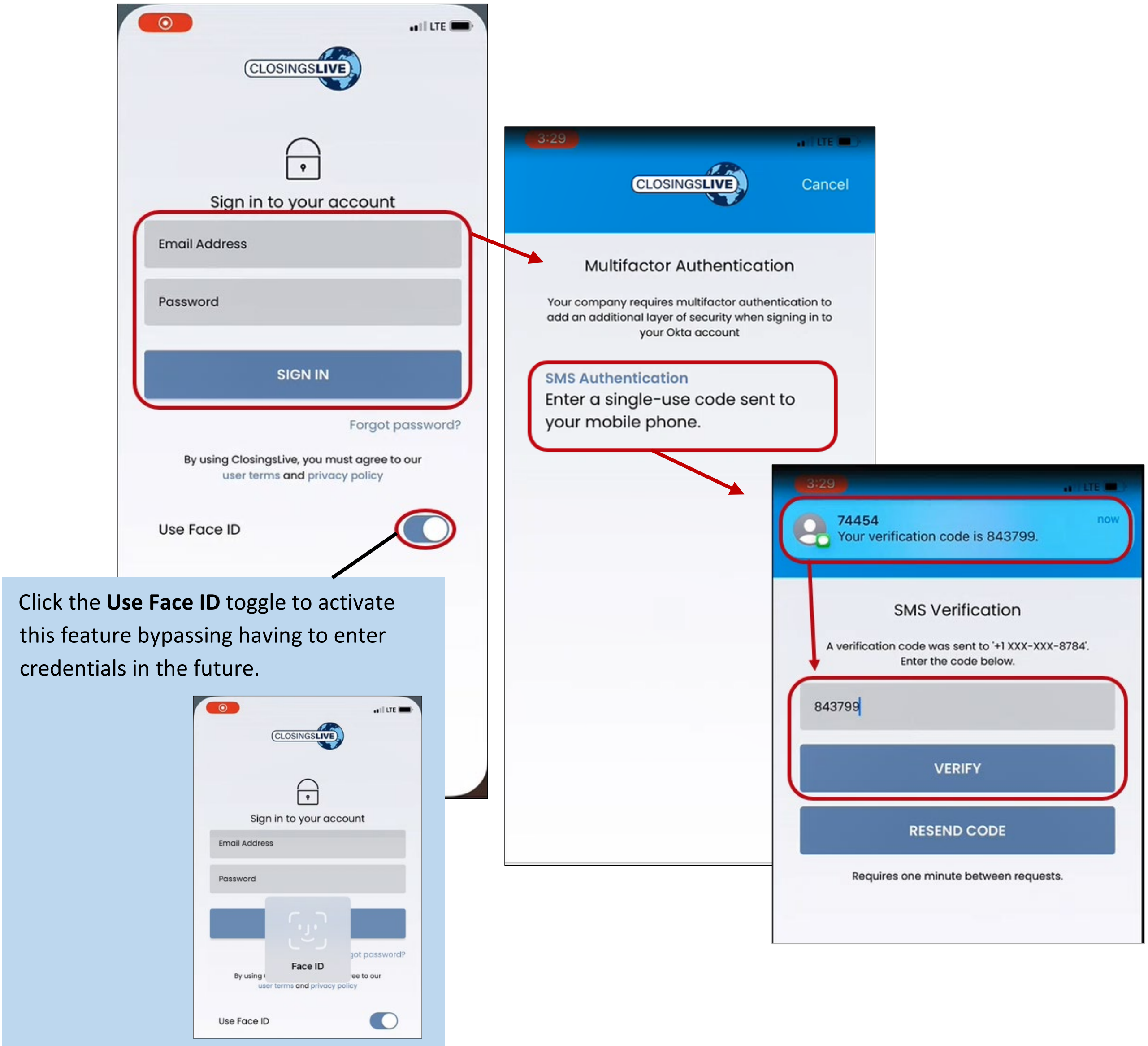
ClosingsLIVE Mobile App

Once a user logs into the ClosingsLIVE Mobile App, they have access to all the orders associated with their email address and have been granted permission to view. They can view property information, messages, documents shared with them, and closing dates. Users can quickly see when the order status has changed, or items have been shared by enabling push notifications.

If a customer works with another company that also utilizes SoftPro ProForm, these orders are listed on the app as well. Like the Web Portal, each order can be shown with the corresponding Brand logo and color based on the client setup.

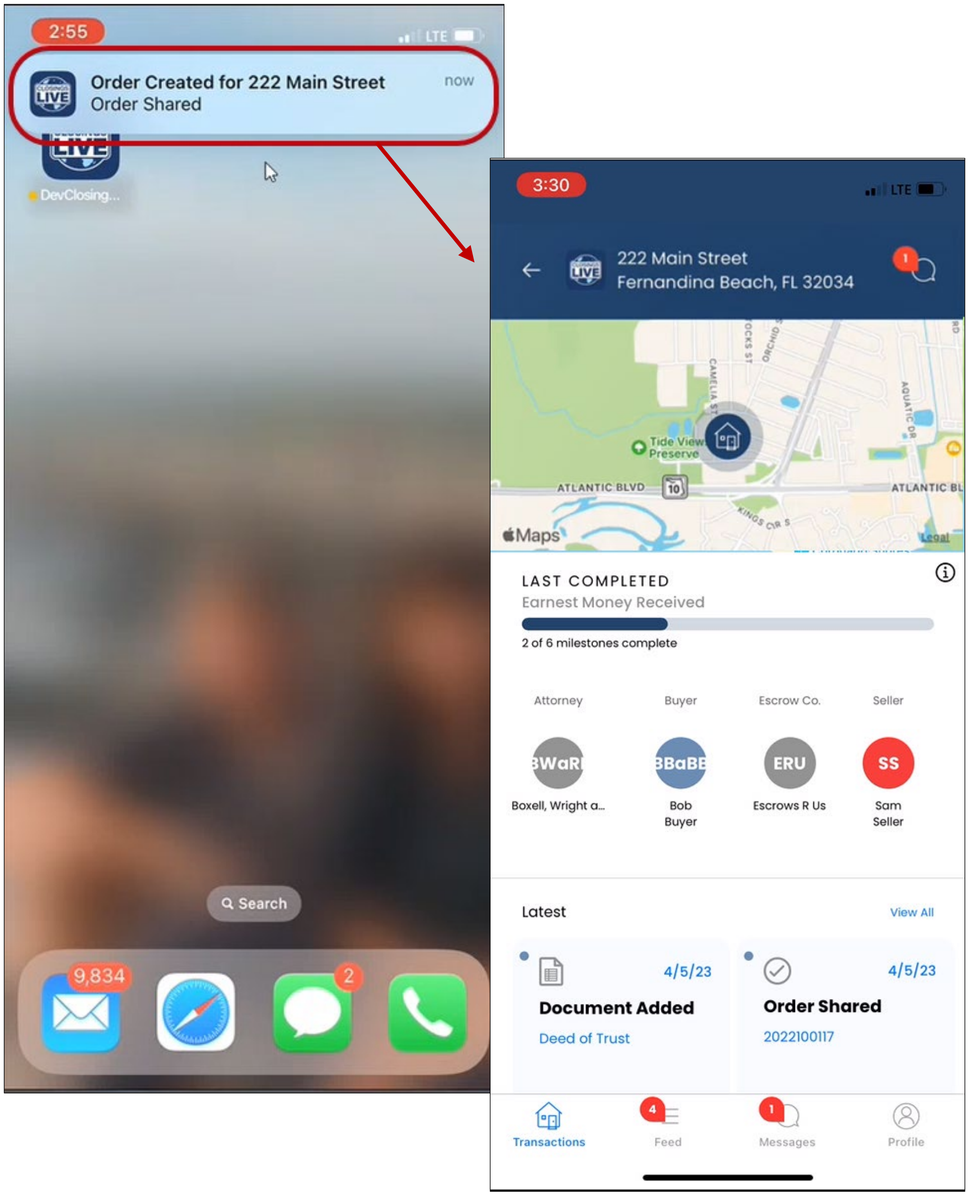
Logging into the Mobile App

The user logs into the app using the ClosingsLIVE credentials and Multi-Factor Authentication (MFA) method (Okta Verify, SMA Authentication, or Voice Call Authentication).



Once logged into the application, the session remains active for 30 minutes. If actively using the application, the session can remain active for up to four hours. The user can return to the application without having to log back during this time. If, however, the active session time has elapsed (no use for any given 30 minutes), the user is required to log in utilizing the steps outlined above.

During an active session, clicking a push notification opens the order without having to step through the log in process.

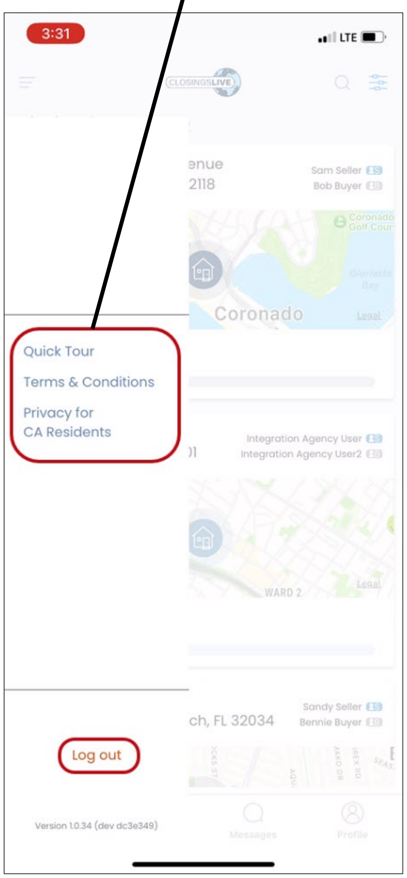

2:55
LTE
Order Created for 222 Main Street
Order Shared
now
DevClosing...
Search
9,834
2
3:30
LTE
222 Main Street
Fernandina Beach, FL 32034
1
Tide View Preserve
ATLANTIC BLVD
ATLANTIC BL
Maps
Legal
LAST COMPLETED
Earnest Money Received
2 of 6 milestones complete
Attorney
Buyer
Escrow Co.
Seller
BWaR
BBaBB
ERU
SS
Boxell, Wright a...
Bob Buyer
Escrows R Us
Sam Seller
Latest
View All
4/5/23
Document Added
Deed of Trust
4/5/23
Order Shared
2022100117
Transactions
4
Feed
1
Messages
Profile

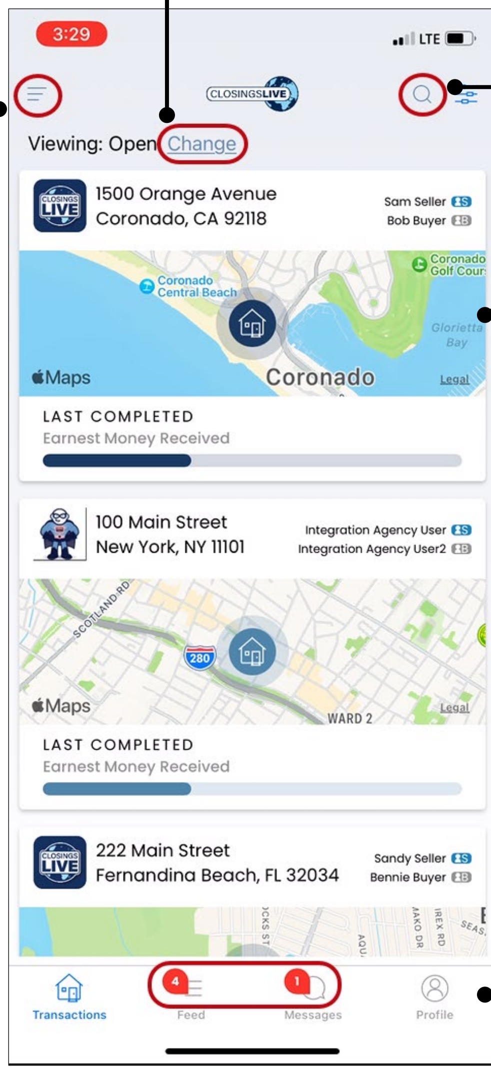
Transaction (Home) Screen

Once logged in, the **Transaction** screen shows a list of the transactions the user has been granted permission to view.

Click the **Change** link to modify your view for the current option.

Click the **Menu** icon to access links to Quick Tour, Terms & Conditions, Privacy for CA, and to Log out.





Search allows you to search on Property Address or Order number.

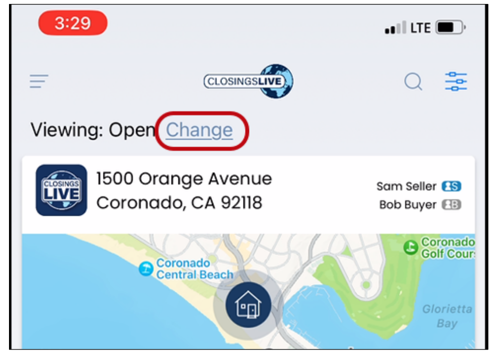
Home screen shows the Transactions in a card view, allowing easy access to important information such as property address, last milestone completed, buyer/seller names (if permissioned) and closing date.

View options
Click here to view,

- **Transactions** list
- **Feed** shows most recent events & messages received
- **Messages** received for all orders
- **Profile** settings

Badges shown here, identify the number of unread events/messages received across all orders.

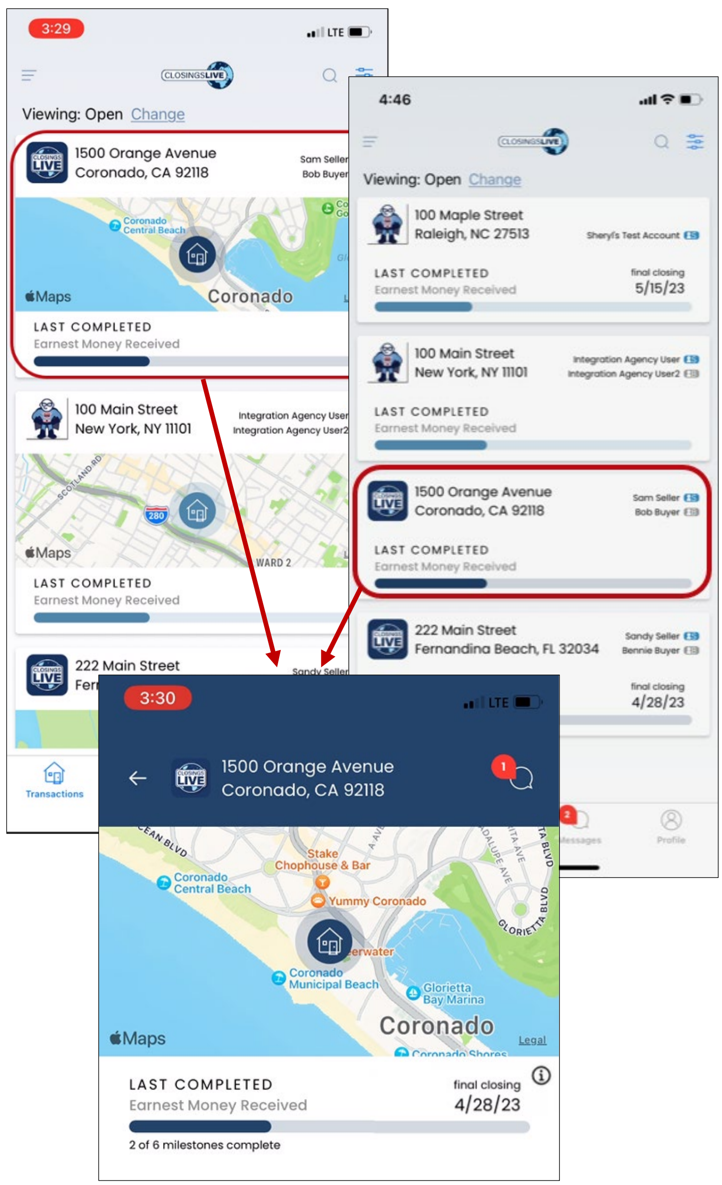
From the Home screen the user can view the orders their emails are associated with and have been granted access to view. This view can be modified by clicking the **Change** link.



Users can,

- show a list of orders with a property map (default setting) or without a property map (compact setting)
- include and sort ascending or descending by,
  - Open Date
  - Closing Date
  - Milestone
  - Buyer
  - Seller
  - Address
  - Status – Open, Canceled and/or Closed

From either view setting, to see an order's details, click an entry on the Home screen.



The order detail screen shows the,

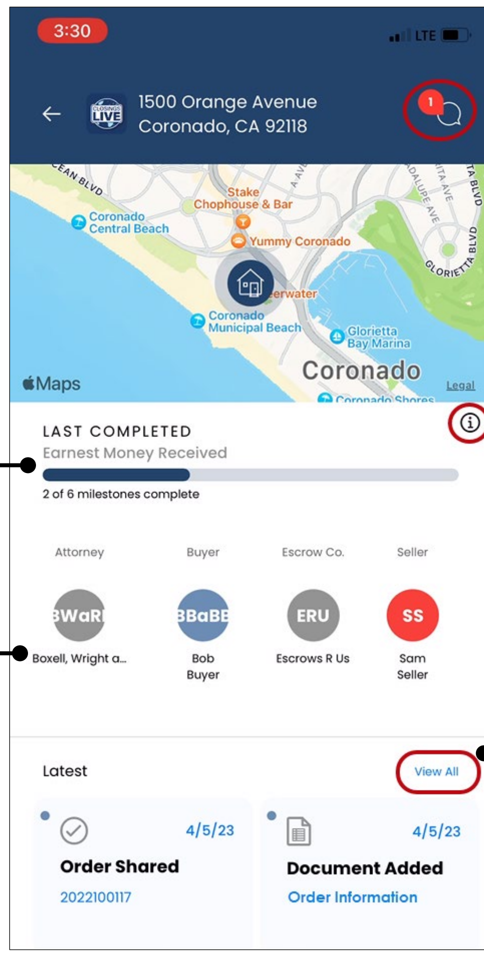
- Property address
- Property map
- Milestones – there must be at least two milestones set in the order to appear in the mobile app. Click the Information ⓘ icon to view a list of all milestones.
- Closing Date – shows **Estimated Closing** if the **Estimated date/time** is checked in the ProForm order or **Final Closing** if the **Estimated date/time** is unchecked.
- Information icon opens the Information window which shows the order number, Escrow Office and a list of milestones.
- Items from the **Feed** relating to this order, and any documents that have been shared.

Badges shown in the Order Details identifies the number of unviewed messages for this transaction only.

Milestones – shows the number of milestones, the most recent completed milestone and how many have been completed.

Information icon shows the Escrow Number, Escrow Office and the list of Milestones identifying their status.

Parties granted access – click a recipient to view contact information entered for the selected contact (phone numbers, email address).

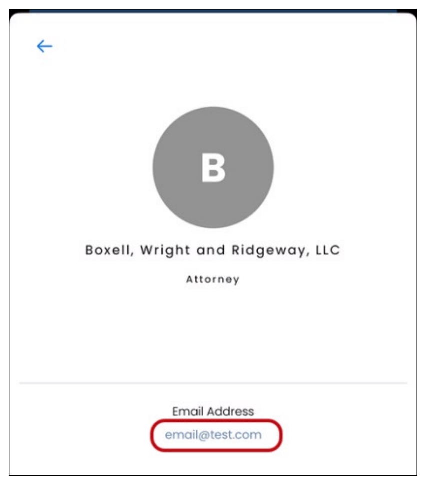


Latest events – shows the most current events occurring for this transaction. Click the **View All** link to see all events for this transaction.

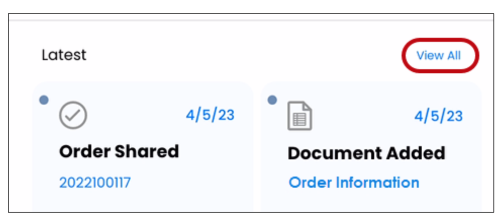
The **Last Completed** section identifies the recently completed milestone along with the total number of milestones and the number completed.

To see the list of all milestones, click the **Information** ⓘ icon to view the **Escrow Number**, **Escrow Office** and the list of **Milestones** with their status. There must be at least two milestones set in the order to appear in the mobile app.

The **Contacts** shown are the parties granted access. To view their entered contact information (i.e., phone numbers, email address), click the corresponding contact. The contact's email address is a link which opens the email software on the phone providing the ability to compose and send a message to that contact.

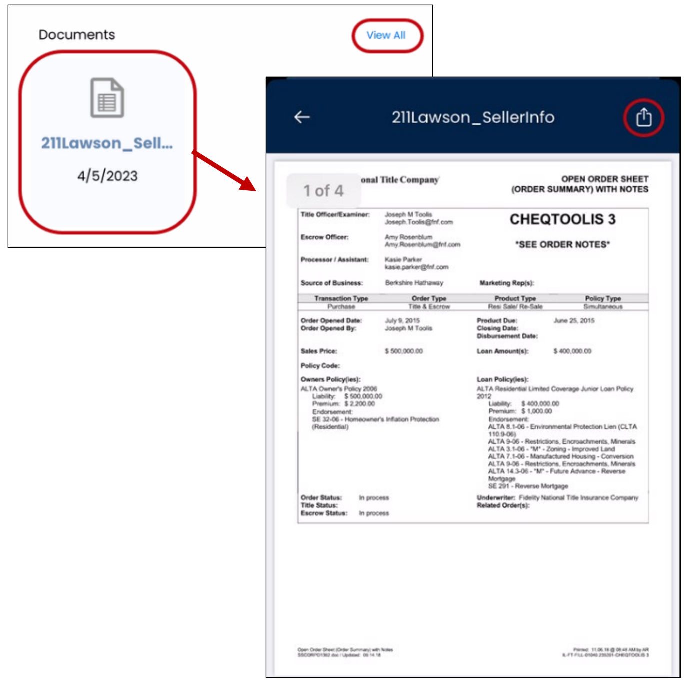


The **Latest** section shows the most current events (i.e., order shared, documents recently added, etc.) for the transaction. Click **View All** to see all events for this transaction.



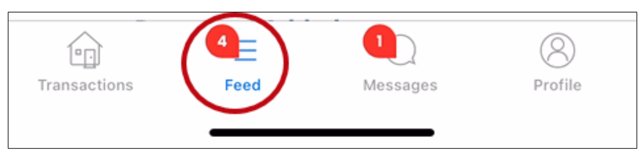
Clicking the event takes the user to the corresponding screen (i.e., **Order Shared** opens the Order Details, **Document Added** opens the specific document) providing all the available functionality of the screen, like sharing a document, sending a message, etc.

Scrolling down in the app allows the user to see the **Documents** section. From here the user can click the most recently received document or click the **View All** link to view all shared documents. Documents can be viewed on screen or click the **Share** icon (upper right corner of document) to use the devices options for sending the document via email, save to files, etc.

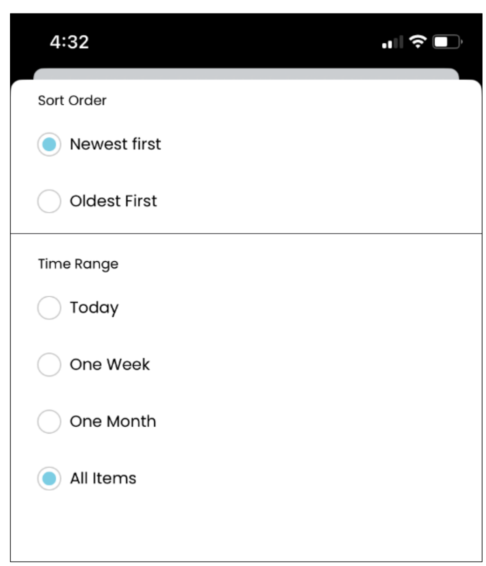


Feed Screen

The user can click the **Feed** option to view a list of all events (i.e., orders shared, messages received, milestone tasks, etc.) as soon as they are published. The Badge identifies the number of unviewed events across all orders.

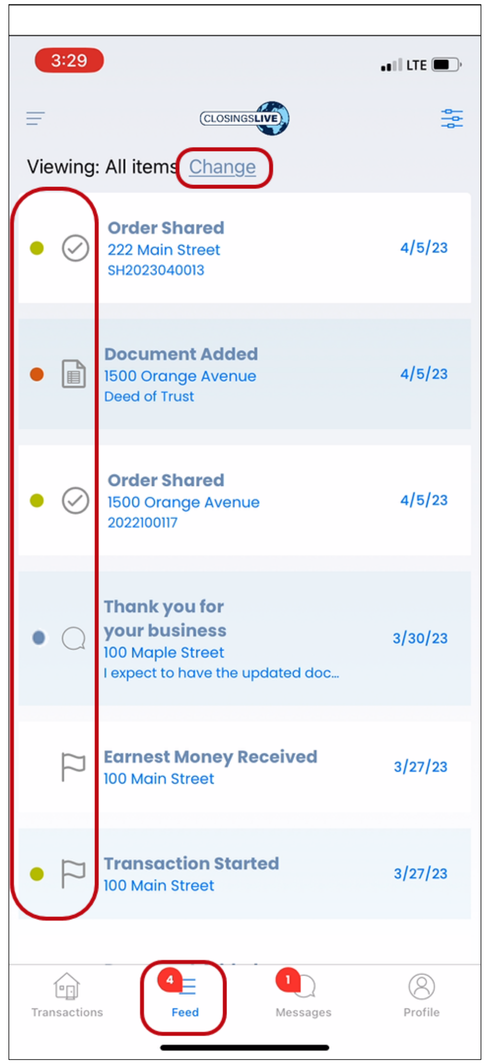


The information is listed by property address, milestones and closing dates. Like the **Transaction** screen, the view can be modified by clicking the **Change** link. The information can be sorted by **Newest first** (default setting) or **Oldest first** as well as the **Time Range** (Today, One Week, One Month, or All Items).



Indicator icons identify whether the event has been viewed (colored dots) and the type of event (event icons).

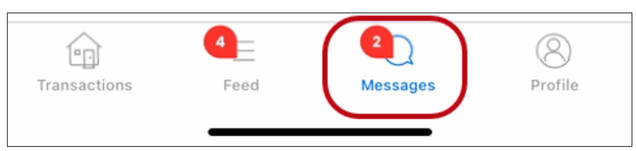
Order Shared
Document Added
Milestone Updated
Message Added



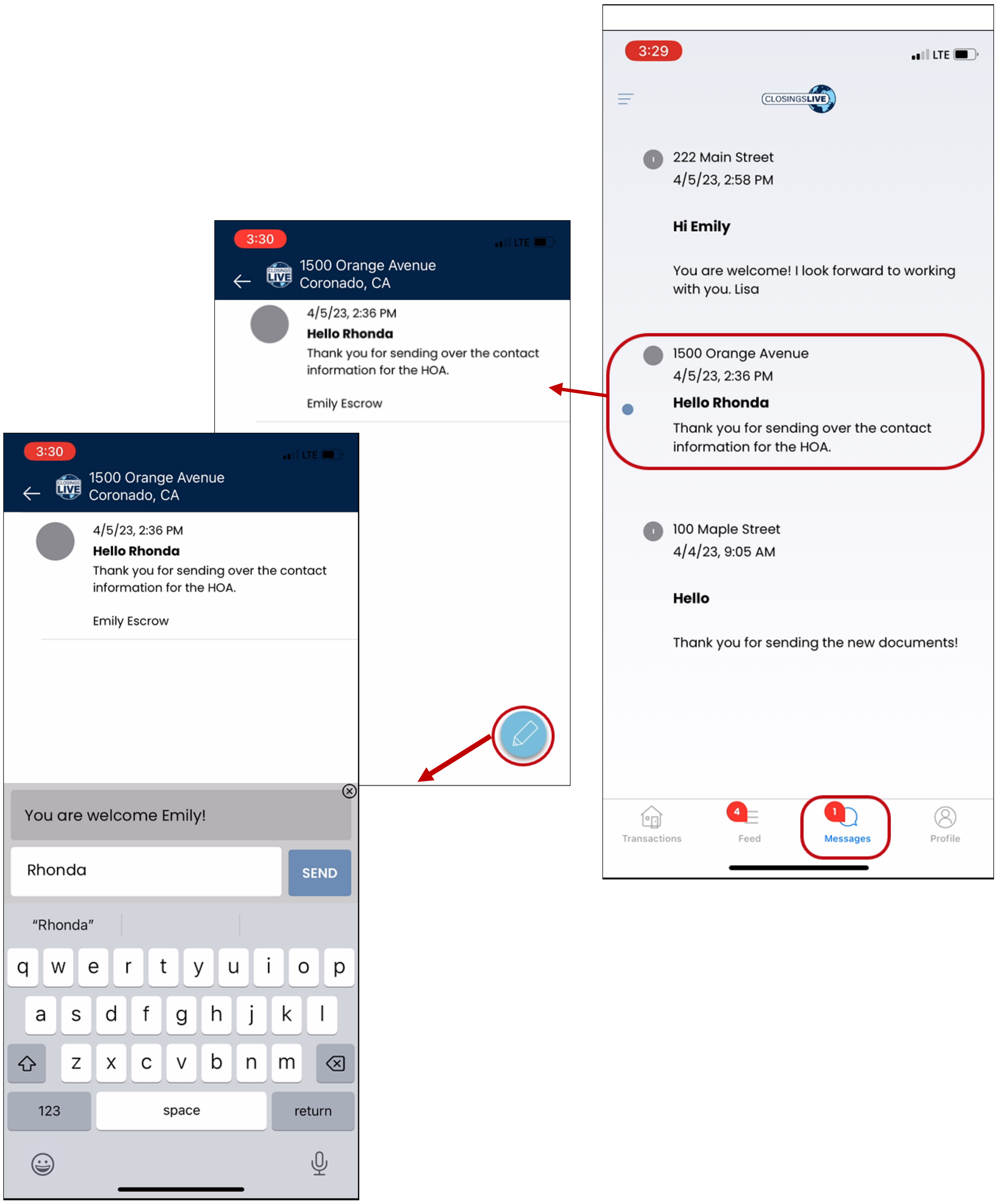
Click an entry to view in more detail (i.e., open a document or read a message as well as reply to the message).

Messages Screen

Click the **Messages** option to view the latest messages sent or received.

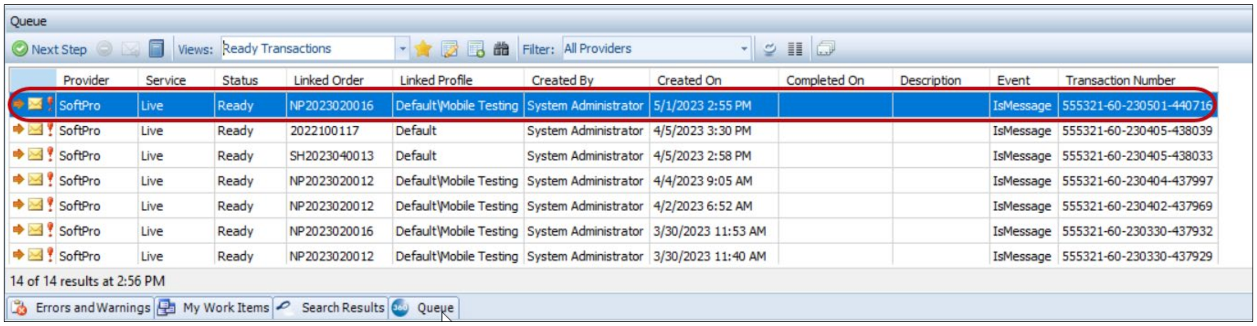


This option shows the date and time the message was sent, along with the subject and a short preview of the message. Clicking an entry on the screen opens the message and provides access to the **Message** icon to create and send a reply. Once the message is entered, click **Send** to submit.



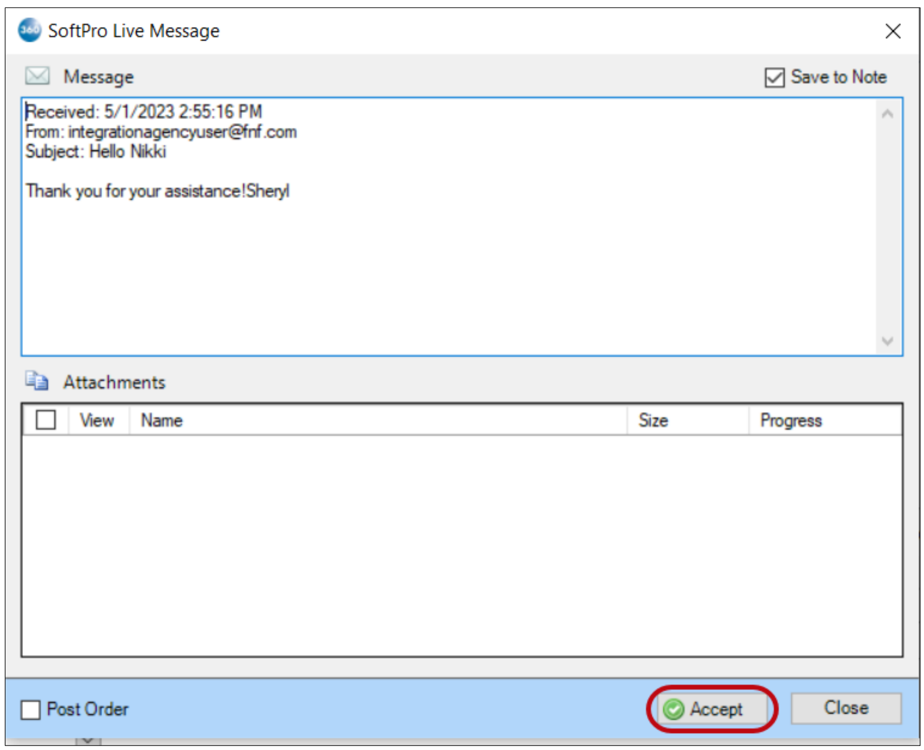
3:29
LTE
222 Main Street
4/5/23, 2:58 PM
Hi Emily
You are welcome! I look forward to working with you. Lisa
1500 Orange Avenue
4/5/23, 2:36 PM
Hello Rhonda
Thank you for sending over the contact information for the HOA.
100 Maple Street
4/4/23, 9:05 AM
Hello
Thank you for sending the new documents!
Transactions
4
Feed
1
Messages
Profile
3:30
1500 Orange Avenue
Coronado, CA
4/5/23, 2:36 PM
Hello Rhonda
Thank you for sending over the contact information for the HOA.
Emily Escrow
3:30
1500 Orange Avenue
Coronado, CA
4/5/23, 2:36 PM
Hello Rhonda
Thank you for sending over the contact information for the HOA.
Emily Escrow
You are welcome Emily!
Rhonda
SEND
"Rhonda"
q w e r t y u i o p
a s d f g h j k l
z x c v b n m
123
space
return

When the client submits a message, it is displayed in the **360 Queue** with a **Status** of **Ready** and is identified in the **Event** column as an **IsMessage**.



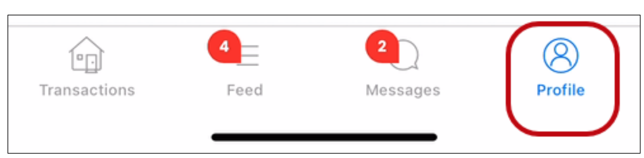
Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On	Completed On	Description	Event	Transaction Number
SoftPro	Live	Ready	NP2023020016	Default\Mobile Testing	System Administrator	5/1/2023 2:55 PM			IsMessage	555321-60-230501-440716
SoftPro	Live	Ready	2022100117	Default	System Administrator	4/5/2023 3:30 PM			IsMessage	555321-60-230405-438039
SoftPro	Live	Ready	SH2023040013	Default	System Administrator	4/5/2023 2:58 PM			IsMessage	555321-60-230405-438033
SoftPro	Live	Ready	NP2023020012	Default\Mobile Testing	System Administrator	4/4/2023 9:05 AM			IsMessage	555321-60-230404-437997
SoftPro	Live	Ready	NP2023020012	Default\Mobile Testing	System Administrator	4/2/2023 6:52 AM			IsMessage	555321-60-230402-437969
SoftPro	Live	Ready	NP2023020016	Default\Mobile Testing	System Administrator	3/30/2023 11:53 AM			IsMessage	555321-60-230330-437932
SoftPro	Live	Ready	NP2023020012	Default\Mobile Testing	System Administrator	3/30/2023 11:40 AM			IsMessage	555321-60-230330-437929

Clicking the **Next Step** button allows the user to review and **Accept** the message.

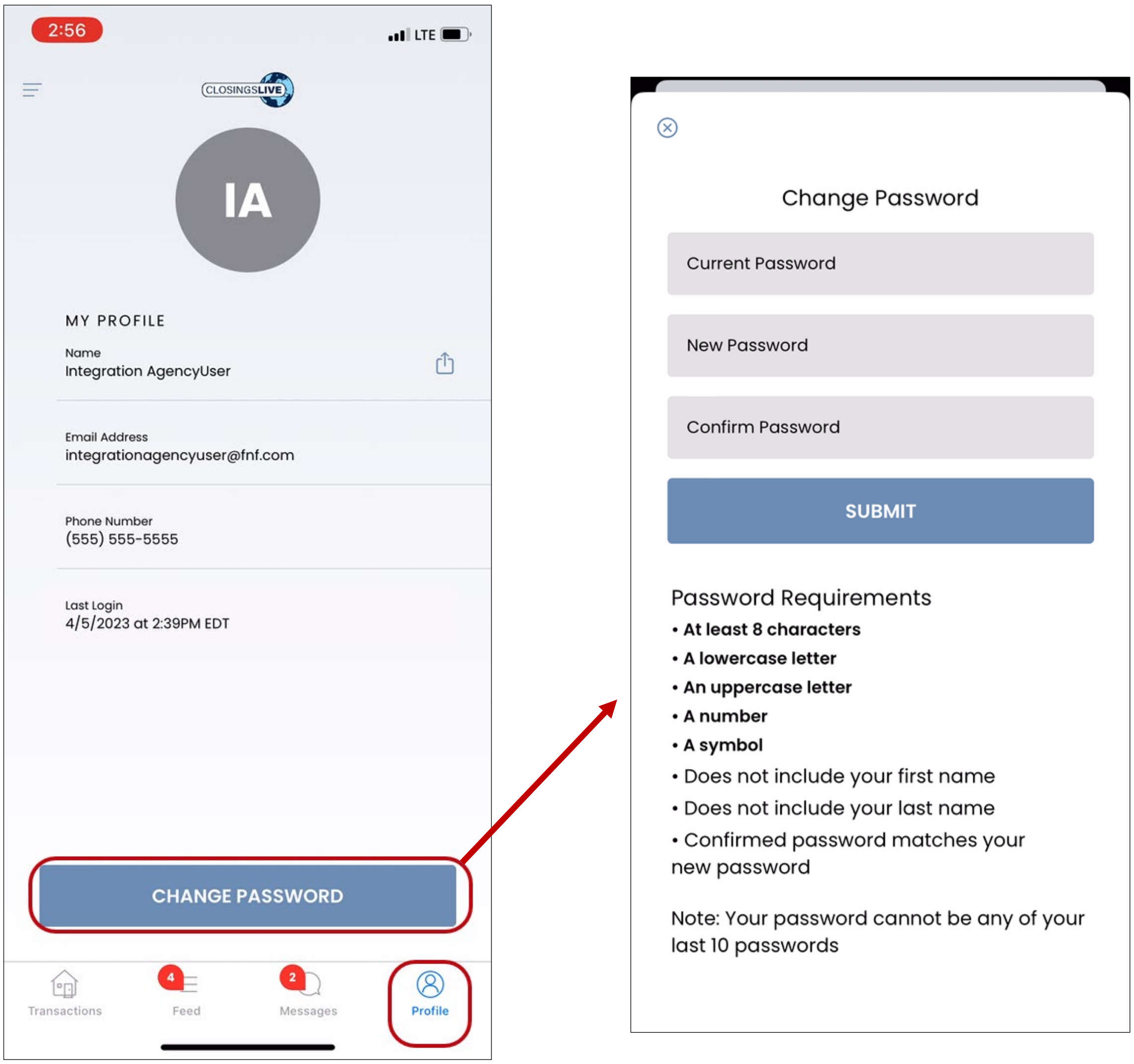


Profile Screen

The final option on the toolbar is the **Profile** option.



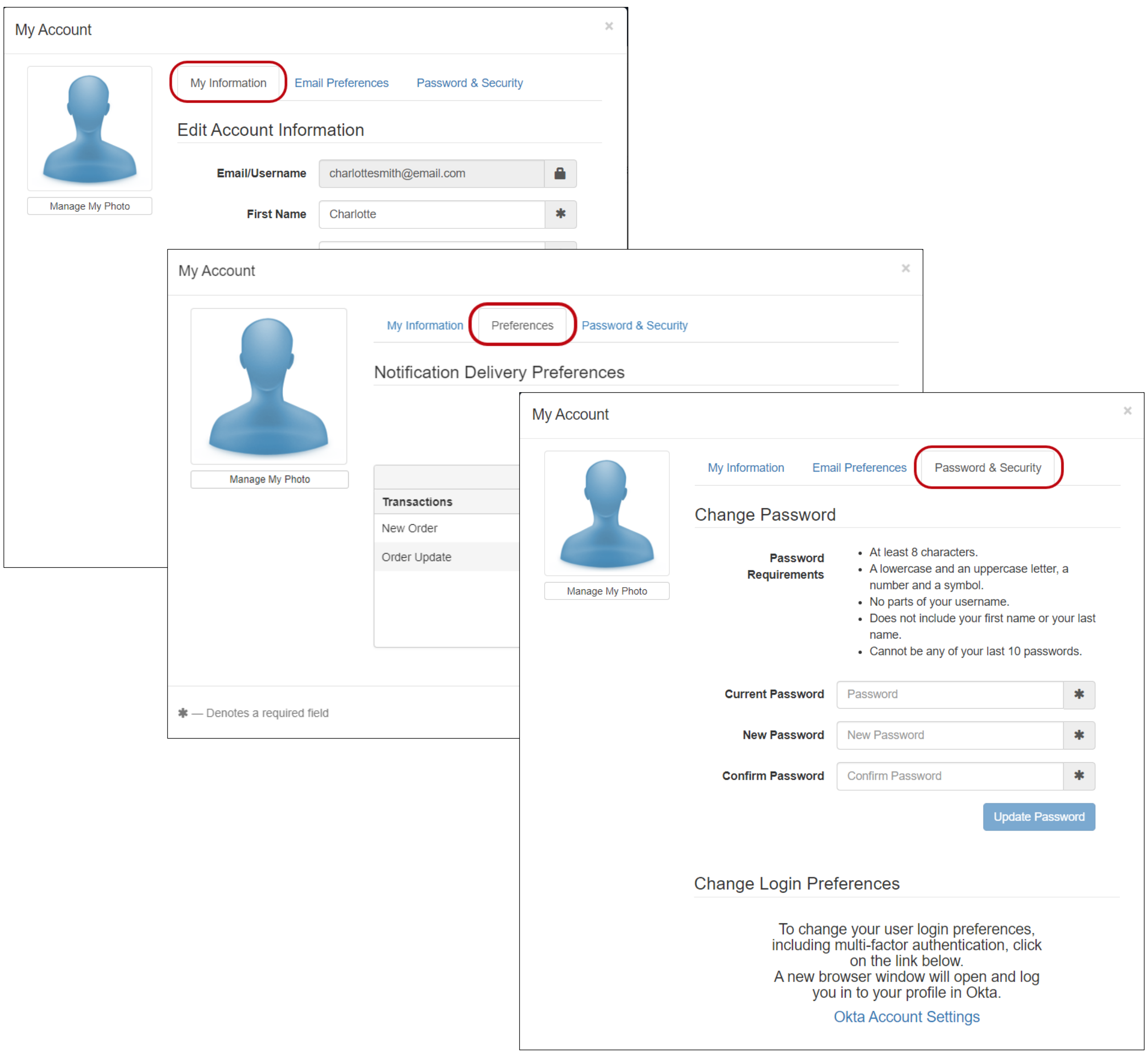
From this screen the user can view the **Name**, **Email** and **Phone Number** associated with the account. The password is also changed from this screen.



Updating User Account Settings Online

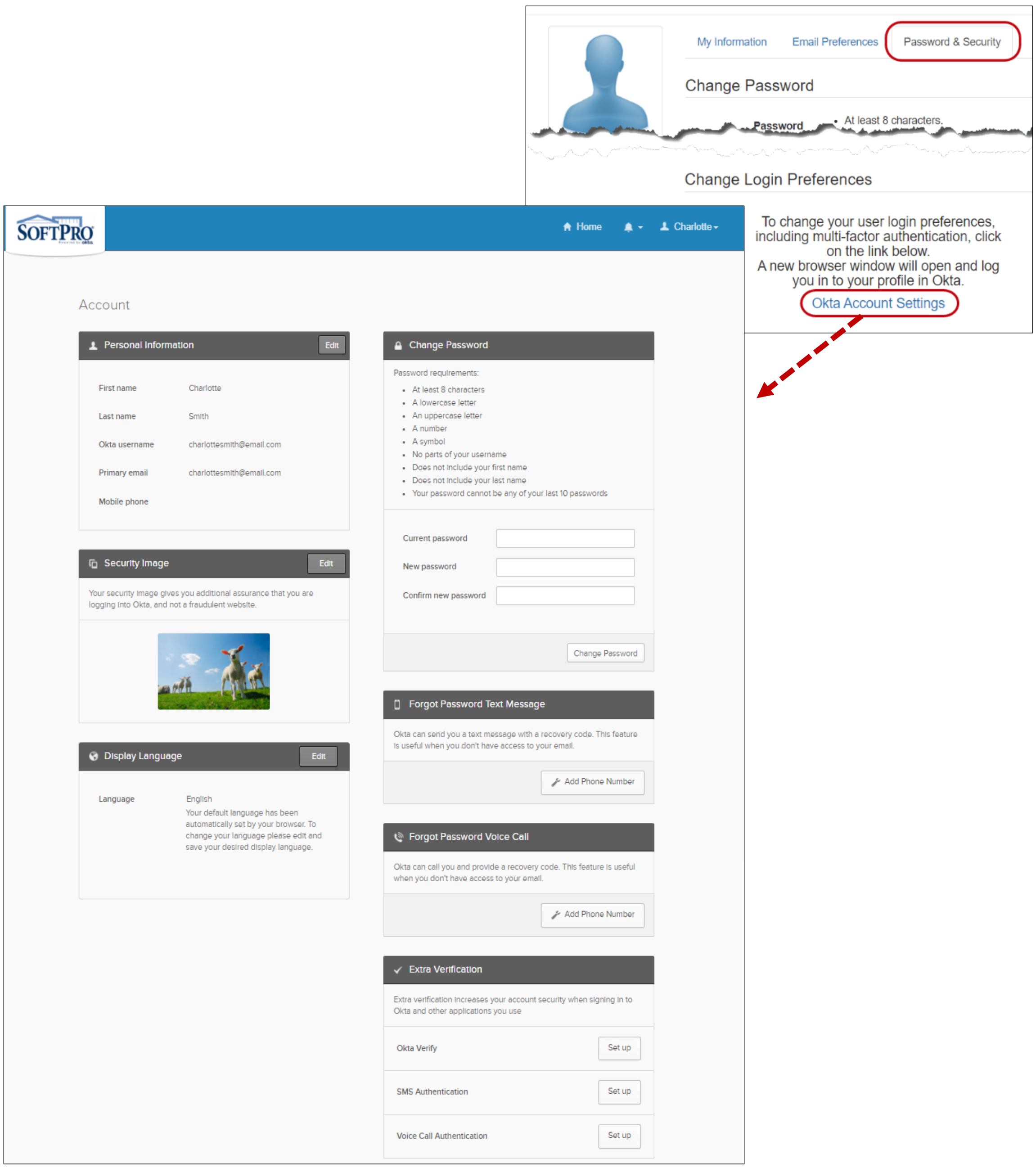
To update account settings when logged into the web portal, click your email address on the toolbar (upper right) and select **Account Settings**.

From the **My Account** window, the user can update profile information, set notification delivery preferences (email and text messages), and change password and security settings.



NOTE: The **Password & Security** tab also provides access to the **Okta Account Settings**. Okta is the account identity management system used by ClosingsLIVE. The link directs users to their Okta settings where they can configure and update password and multi-factor authentication options (if required).

If your website is configured to use the Multi-Factor Authentication (MFA) when logging in, refer to the section, ***Setting Up Multi-Factor Authentication (MFA)***, for instructions on setting up verification options.



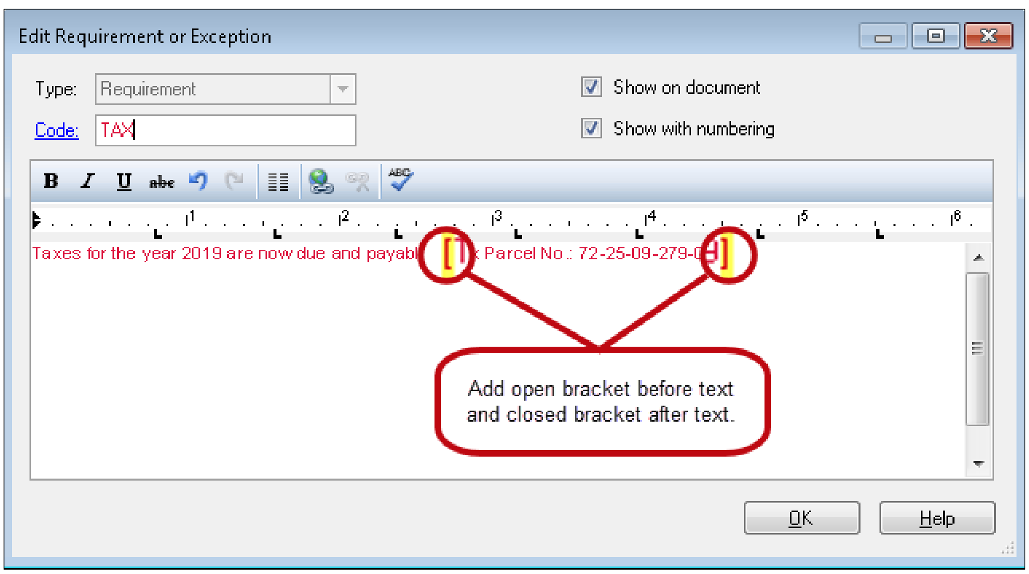
Creating Document Hyperlinks and Attachments

By using the **Create PDF Hyperlink** icon a user can add hyperlinks and/or attachments to any document. Hyperlinks and Attachments may be added through all rich-text formatting dialogs. This provides the user with the means to create valuable in-text references.

For example, a hyperlink could be added to Requirements and Exceptions which could point the recipient to a supporting document on a webpage such as a deed.

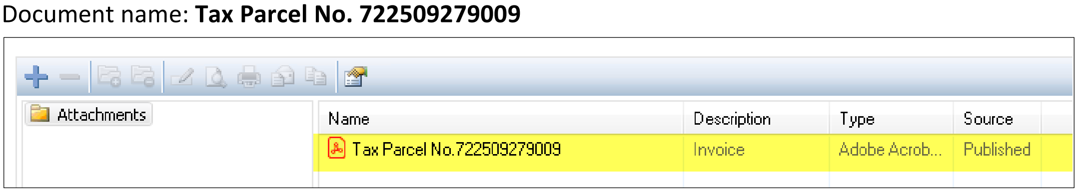
Within the **Edit Requirement or Exception** dialog box, place your cursor in front of the text you want to become a hyperlink or attachment and add an open bracket '**[**'. Place your cursor at the end of the text and close the text with a closed bracket '**]**'.

In our example, we want the tax parcel verbiage to be hyperlinked. We enter, **[**Tax Parcel No.: 722509279009**]**.

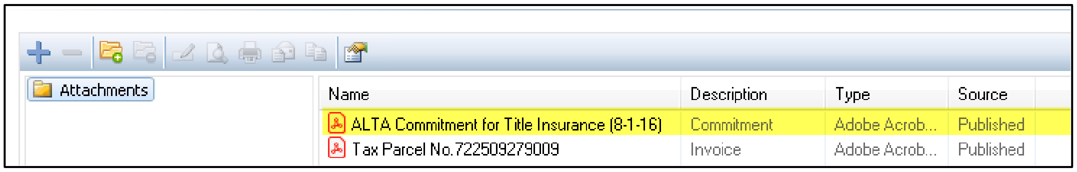


IMPORTANT: To attach or hyperlink a document, the document must be in the **Attachments** folder of your order or posted to ClosingsLIVE. The document name must be the same as the text within the open/closed brackets.

Example:
Text to be hyperlinked: [**Tax Parcel No. 722509279009**]
Document name: **Tax Parcel No. 722509279009**

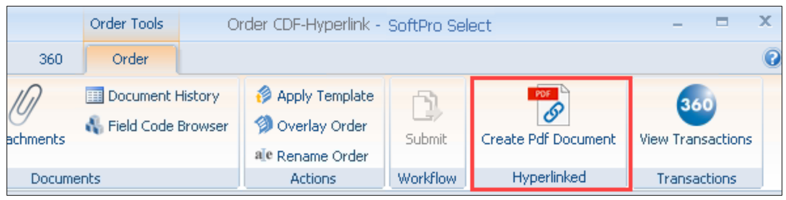


Publish the document containing the hyperlinked reference to the **Attachments** folder. In this example the commitment will contain the hyperlinked Tax Bill.



Creating Hyperlinks or Attachments in the Commitment

1. From the **Order** ribbon, click the **Create PDF Document** button.

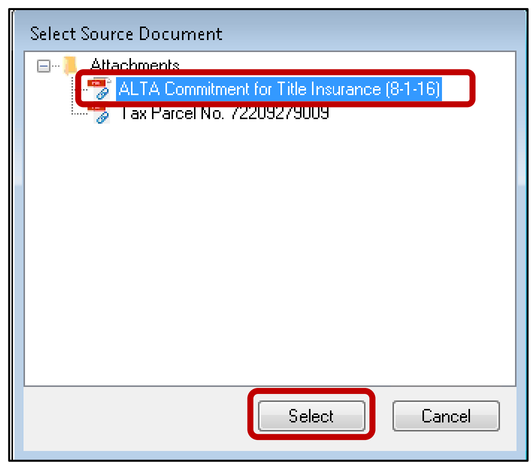


The **Select Source Document** window opens.

2. Highlight the source document to create the hyperlinks and/or attachments. If the document is within a folder, double click the folder to open.

   The Source Document is the document you defined with the open/closed brackets and published to the **Attachments** folder.

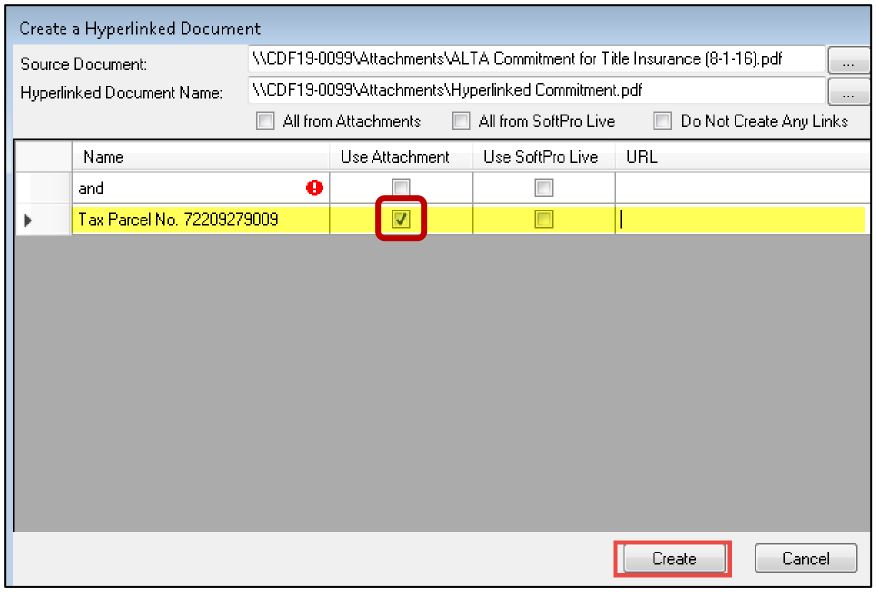
3. Click **Select**.



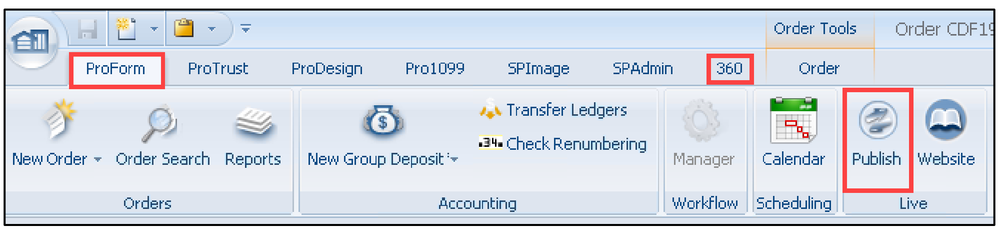
From the **Create a Hyperlinked Document** window,

4. In the **Name** field, enter the URL or check the applicable check box to attach to the commitment
5. Click **Create**

In our example the **Use Attachment** check box is checked because the document being hyperlinked has been saved to the **Attachments** folder within the order.

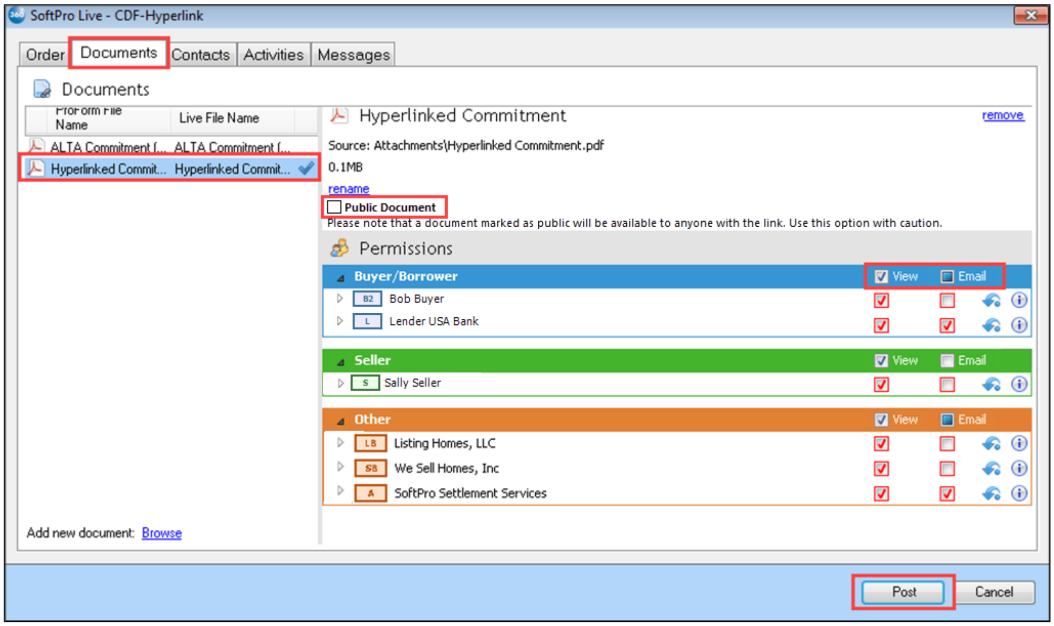


6. **Publish** the document to ClosingsLIVE



In ClosingsLIVE,

7. Click the **Documents** tab
8. Highlight the hyperlinked document
9. Check the corresponding check box for those contacts you want to grant **View** permission.
10. Check the **Public Documents** check box (if permission is granted) to allow the document to be shared by the recipient. For more information on Public Documents, refer to Share a Document (page 9).
11. Click the **Post** button



The Customer can click the hyperlinked text to access the document via URL / WEB address or as an attachment to the Commitment.

SCHEDULE B, PART I
Requirements

All of the following Requirements must be met:

1. The Proposed Insured must notify the Company in writing of the name of any party not referred to in this Commitment who will obtain an interest in the Land or who will make a loan on the Land. The Company may then make additional Requirements or Exceptions.

2. Pay the agreed amount for the estate or interest to be insured.

3. Pay the premiums, fees, and charges for the Policy to the Company.

4. Documents satisfactory to the Company that convey the Title or create the Mortgage to be insured, or both, must be properly authorized, executed, delivered, and recorded in the Public Records.

   Mortgage from Dan Haven to , securing the principal amount of $0.00.

5. Payment in full of Street assessment. We are advised the amount due is $5,000.00.

6. Pay us the premiums, fees and charges for the policy.

7. Survey Required.

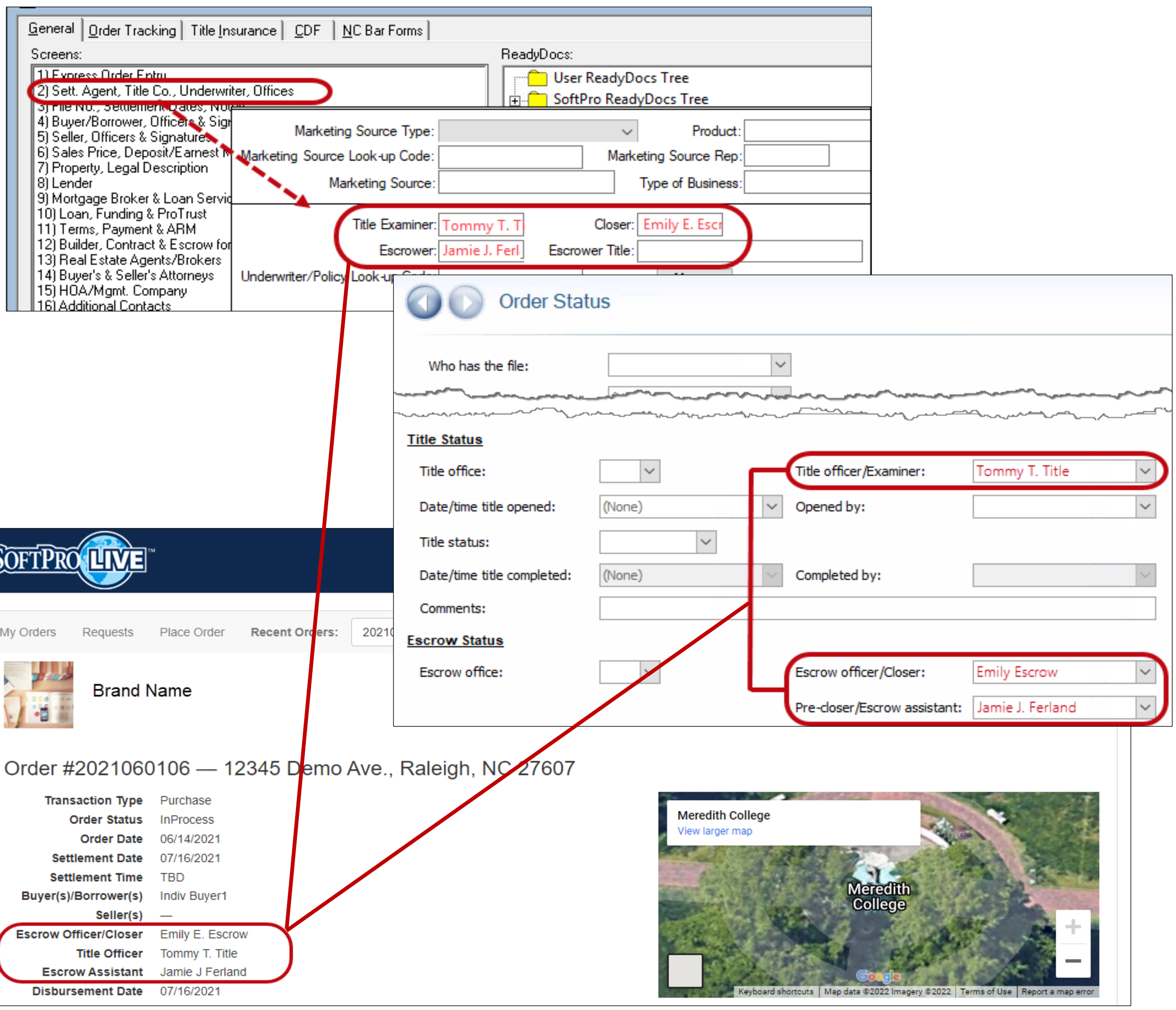
8. Taxes for the year 2019 are now due and payable Tax Parcel No. 72209279009.

Messages

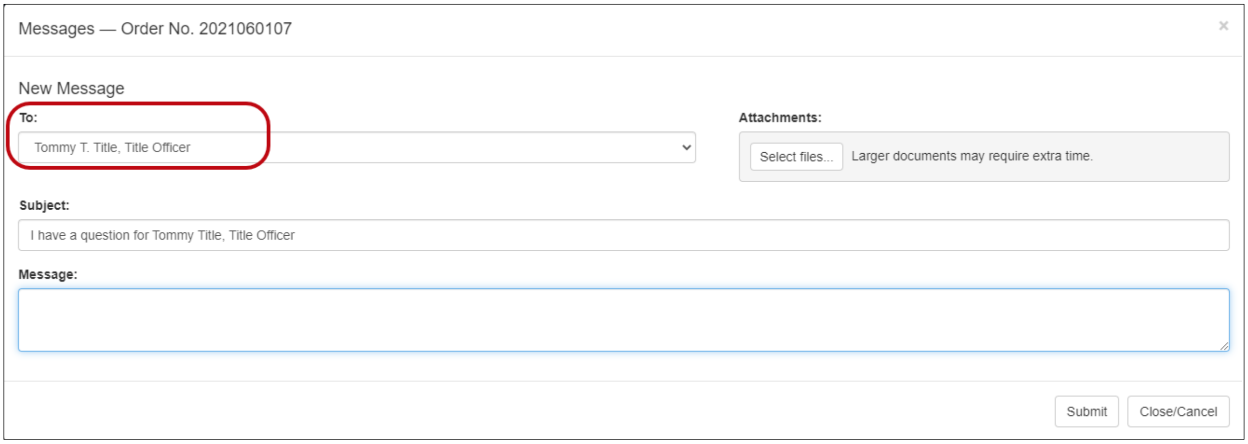
Sending/Receiving an Order Officer Message

When the SoftPro order is posted to ClosingsLIVE, the name and email address of the Escrow Officer/Closer, Title Officer and Escrow Assistant are automatically published if the information is entered in the SoftPro Settlement Agent Contact in the order. The names are then displayed on the Order Details screen in ClosingsLIVE.

Displaying the Order Officers may be enabled/disabled as needed. Contact SoftPro Support for further details.

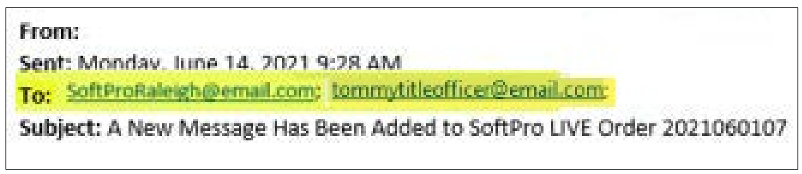


This allows your customer the opportunity to send or reply to a message and include an Order Officer as a recipient.

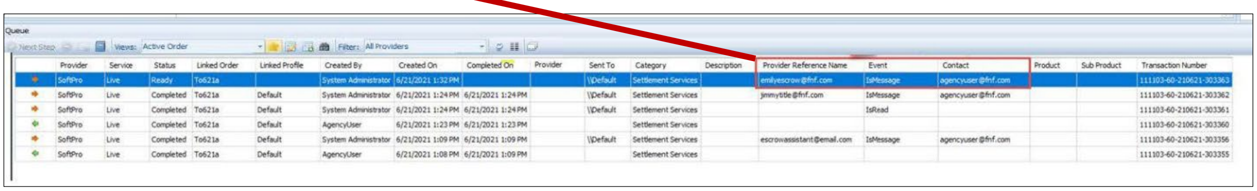


If an Order Officer is selected, the message is sent to the Notification Email Address associated with the profile configured in SPLive as well as the email associated with the Escrow Officer\Closer, Title Officer or Escrow Assistant listed in these fields in Select.

In our example, Tommy T. Title, Title Officer was selected, and the email message sent to the SoftPro Raleigh Office and Tommy T. Title, Title Officer.



Once the message is received, in Select, the 360 Queue shows the order officer name under the **Provider Reference Name** column.



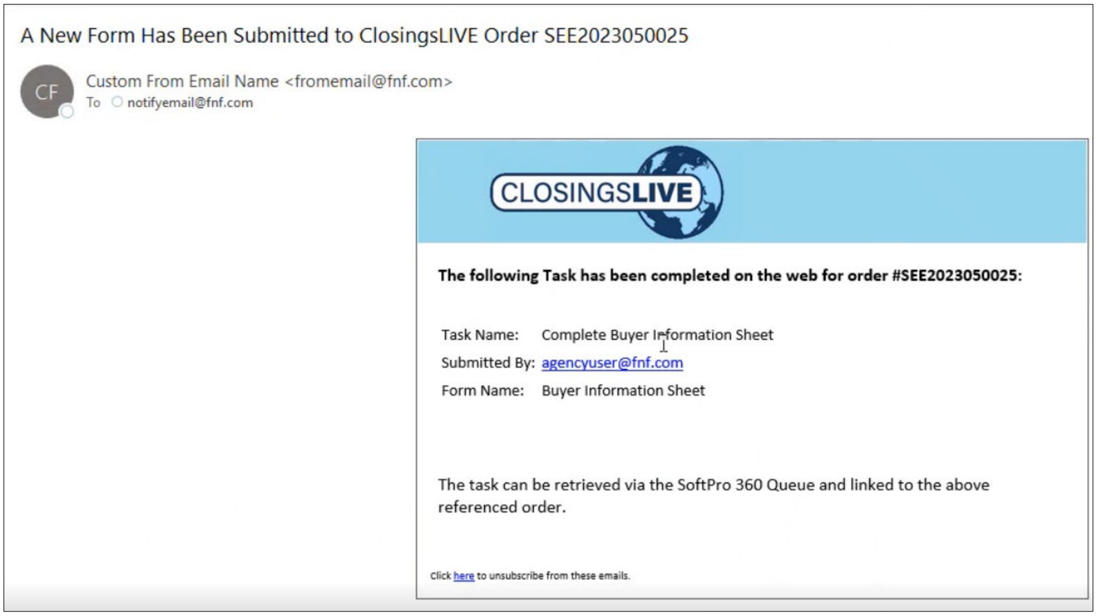
	Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On	Completed On	Provider	Sent To	Category	Description	Provider Reference Name	Event	Contact	Product	Sub Product	Transaction Number
	SoftPro	Live	Ready	To621a		System Administrator	6/21/2021 1:32 PM			\\Default	Settlement Services		emilyescrow@fnf.com	IsMessage	agencyuser@fnf.com			111103-60-210621-303363
	SoftPro	Live	Completed	To621a	Default	System Administrator	6/21/2021 1:24 PM	6/21/2021 1:24 PM		\\Default	Settlement Services		jimmytitle@fnf.com	IsMessage	agencyuser@fnf.com			111103-60-210621-303362
	SoftPro	Live	Completed	To621a	Default	System Administrator	6/21/2021 1:24 PM	6/21/2021 1:24 PM		\\Default	Settlement Services			IsRead				111103-60-210621-303361
	SoftPro	Live	Completed	To621a	Default	AgencyUser	6/21/2021 1:23 PM	6/21/2021 1:23 PM			Settlement Services							111103-60-210621-303360
	SoftPro	Live	Completed	To621a	Default	System Administrator	6/21/2021 1:09 PM	6/21/2021 1:09 PM		\\Default	Settlement Services		escrowassistant@email.com	IsMessage	agencyuser@fnf.com			111103-60-210621-303356
	SoftPro	Live	Completed	To621a	Default	AgencyUser	6/21/2021 1:08 PM	6/21/2021 1:09 PM			Settlement Services							111103-60-210621-303355

If the **Provider Reference Name** column is not visible, click the **Columns** icon on the 360 Queue toolbar to select as an active column. You can also select the Contact name to show the email sender's name in the 360 Queue. Select users can create a custom 360 view to see only those messages sent to a specific Order officer.

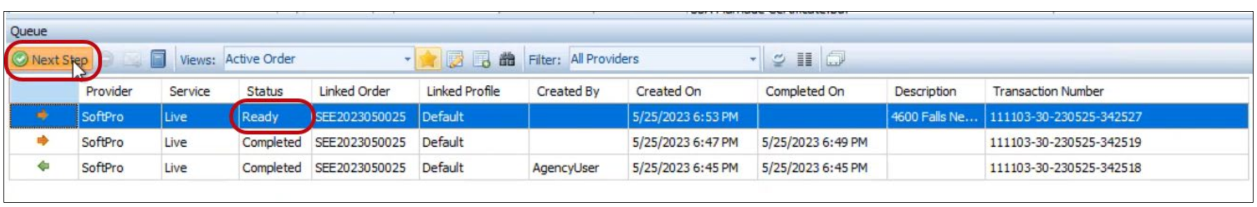
Once the message is accepted, the **Order Notes** screen is updated with the email message including the recipient.

Receiving Task Submission Messages

When a customer completes an action associated with a task, a message is received identifying the task is complete and the associated form or data received.



In SoftPro, open the corresponding order. The **360 Queue** shows the message with a **Status** of **Ready**. Click the **Next Step** button to proceed to the Review window to review and accept the data (if a completed online form) or the submitted message (if an uploaded form) to accept the message and document.

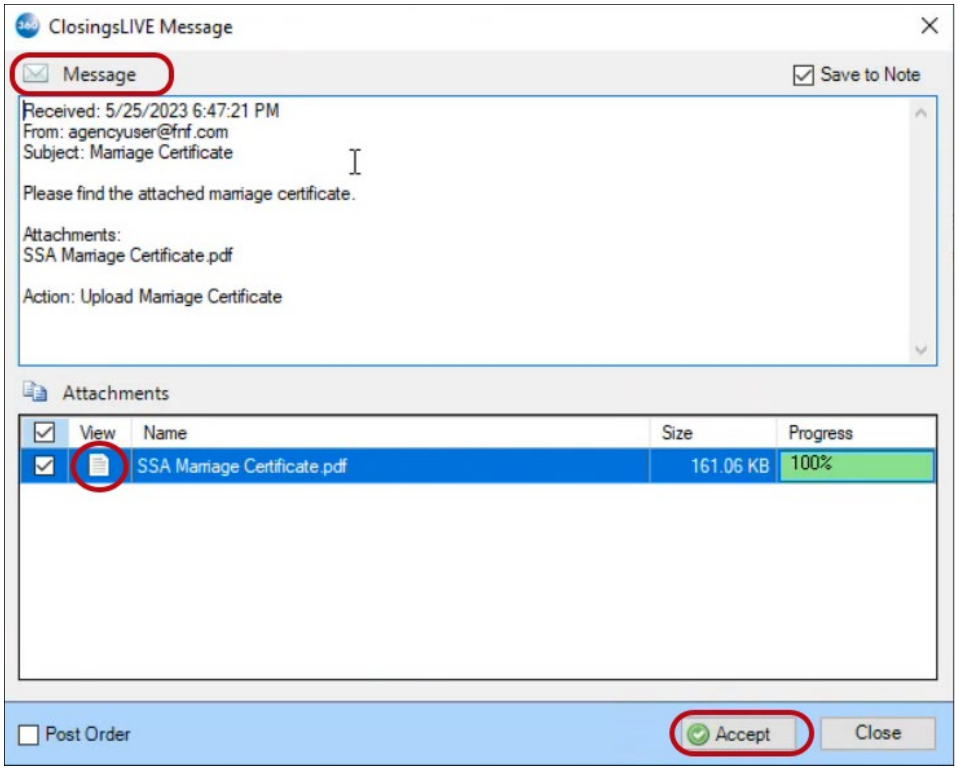


Receiving/Accepting an Uploaded Document

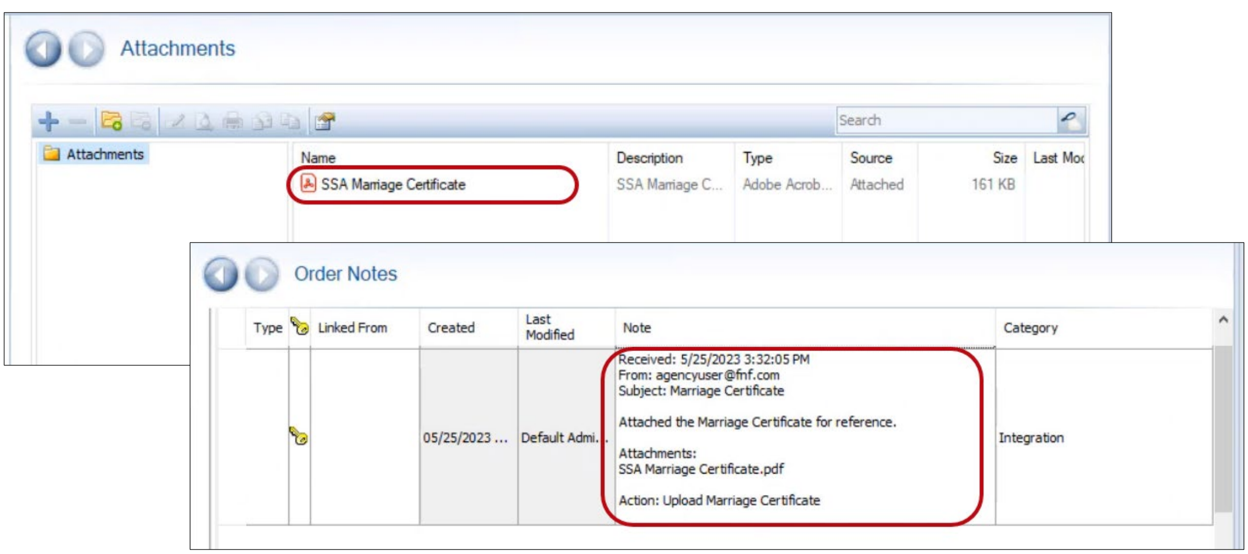
If an uploaded document has been received, the **ClosingsLIVE Message** window opens, displaying the message and the uploaded document in the **Attachments** section.

The full message is shown in the Message section.

Click the **View**  icon in the **Attachments** section to open the document.

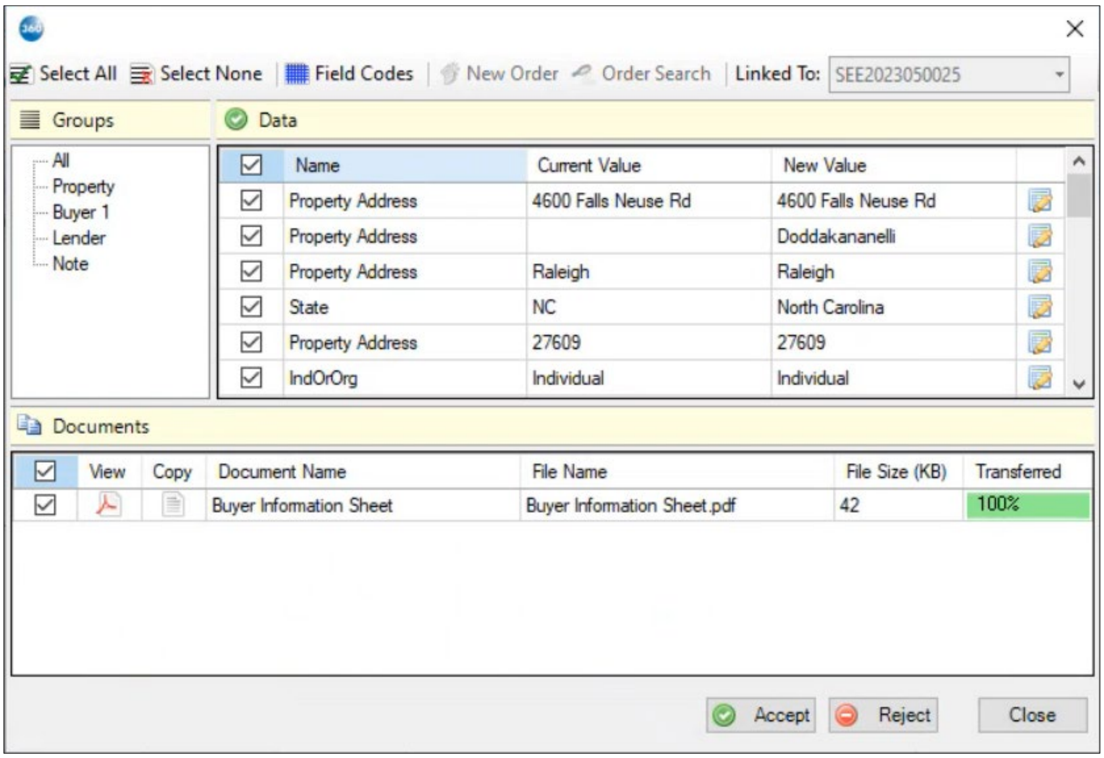


Click **Accept** to import the document to the **Attachments** screen and the message to the **Order Notes** screen within the SoftPro order.



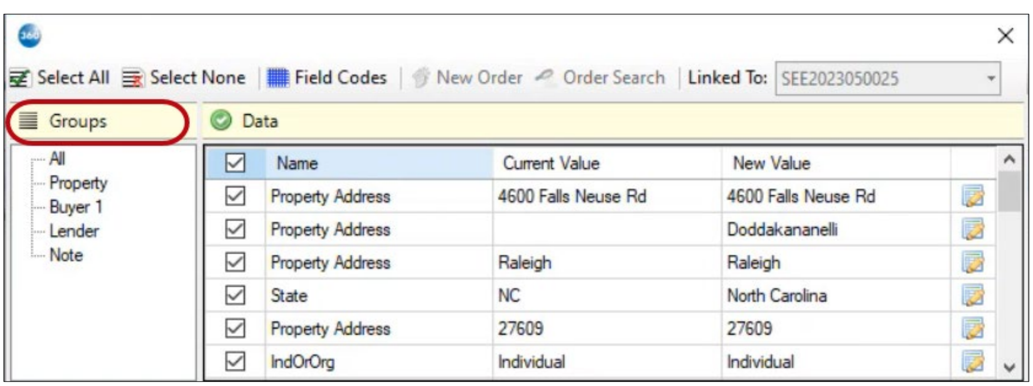
Receiving/Accepting a Completed Online Form

The **Review** screen opens showing the information entered in the online form for each mapped field (not all form fields are mapped to the SoftPro order). From here the data entered can be reviewed before importing, select what data is imported, view the form in PDF format or the submission can be rejected completely.

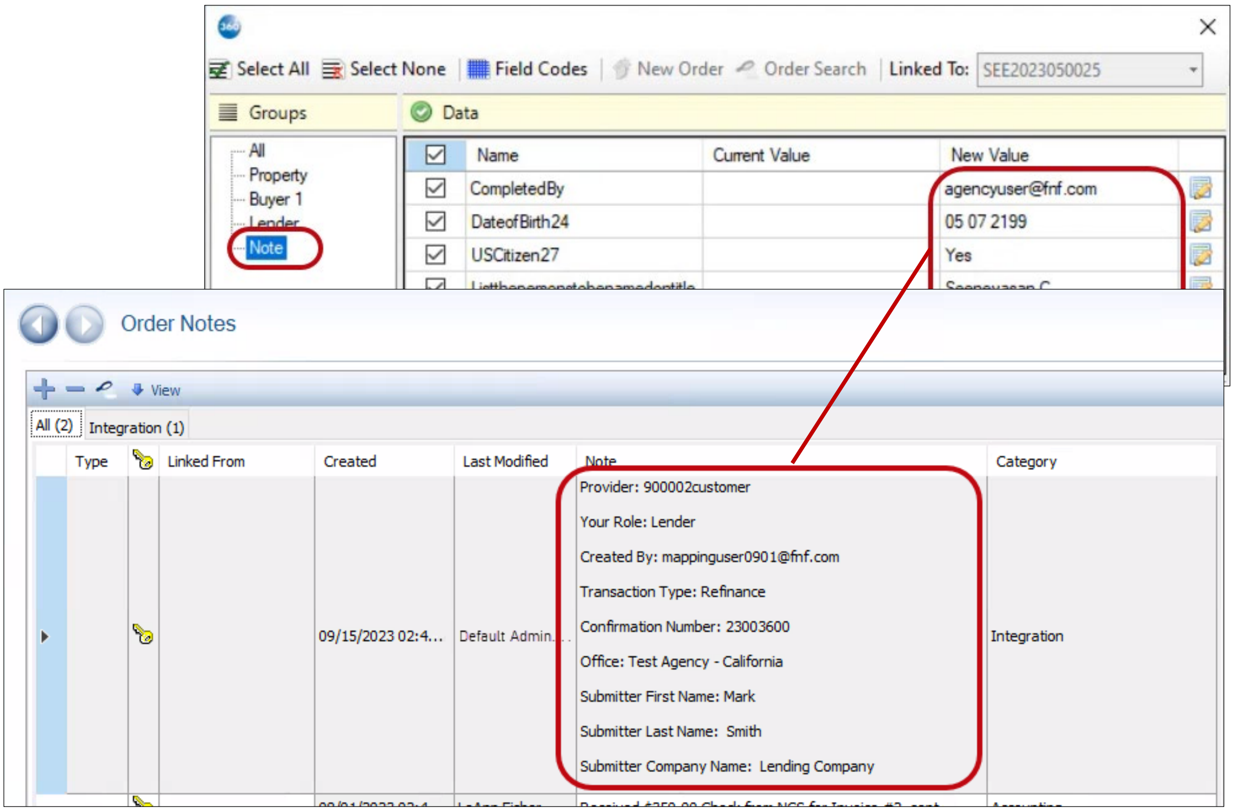


Groups Section

In the **Groups** section, the data from the online form is grouped by category for easier navigation to a desired field or group of fields. Selecting a group displays only that group's data in the adjacent **Data** section. Selecting **All** in the **Groups** tree displays all data submitted from the online form.



The **Note** entry shows data for those field that are not mapped to a SoftPro order field. This information is written to the **Order Notes** screen within the SoftPro order.

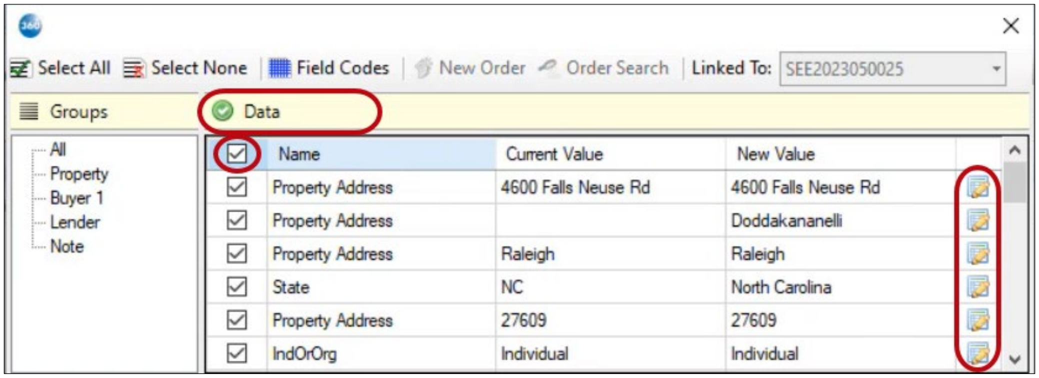


The **Note** entry also records data for the Submitter First Name, Submitter Last Name and Submitter Company name when the online fields are completed.

Data Section

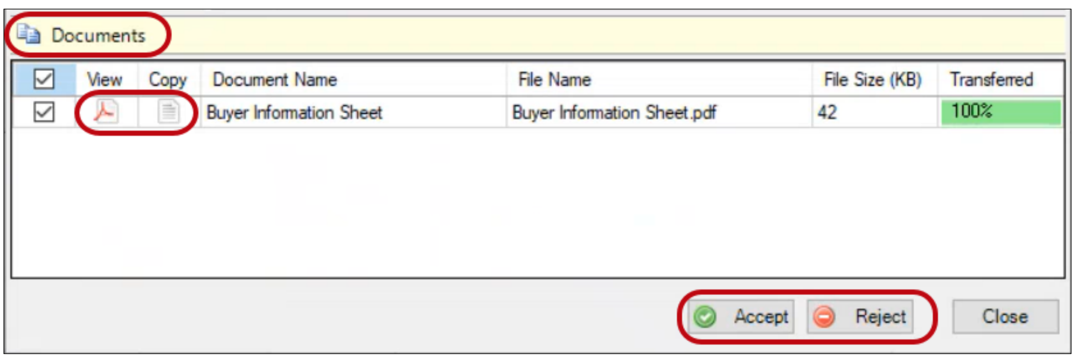
The **Data** section displays the data entered in the online form in the **New Value** column. This data has been mapped to the fields listed in the **Name** column. Any data that already exists in the SoftPro order displays in the **Current Value** column. By default, all data is selected for importing into the linked order.

- Using the scroll bar on the right side of the **Data** section allows you to review the data for the group(s) selected in the **Groups** section.
- The **Name** field check box can be unchecked to exclude the **New Value** from being imported into the linked order. All data can be included or excluded by selecting the check box in the **Data** Section header.
- Click the **Edit** icon to open the **Edit New Value** window. Here you can change the **New Value** to be imported for that field. Hovering your curser over the options at the top of the window opens a description of each editing feature in this window.



Documents Section

The customer completed online form submitted is listed in the **Documents** section of the **Review** screen. Click the **View** icon **to** open the document for viewing. Click the **Copy** icon to copy the image of the document to the clipboard from there it can be pasted into an external application. By default, all documents are selected for importing into the linked order.



Accepting the Data

Click the **Accept** button in the lower right corner of the **Review** screen to import the selected values into the corresponding fields in the linked order. Unmapped fields are written to the **Notes** section of the order, and documents are attached to the order and displayed in the **Attachments** screen. The **Review** screen closes when importing is complete, and the transaction status in the **Queue** changes to **Completed.**

Rejecting the Data

To reject form data, click the **Reject** button in the lower right corner of the **Review** screen. No data, notes or documents are imported into the linked order and the **Review** screen closes. The transaction status in the **Queue** changes to **Rejected.**

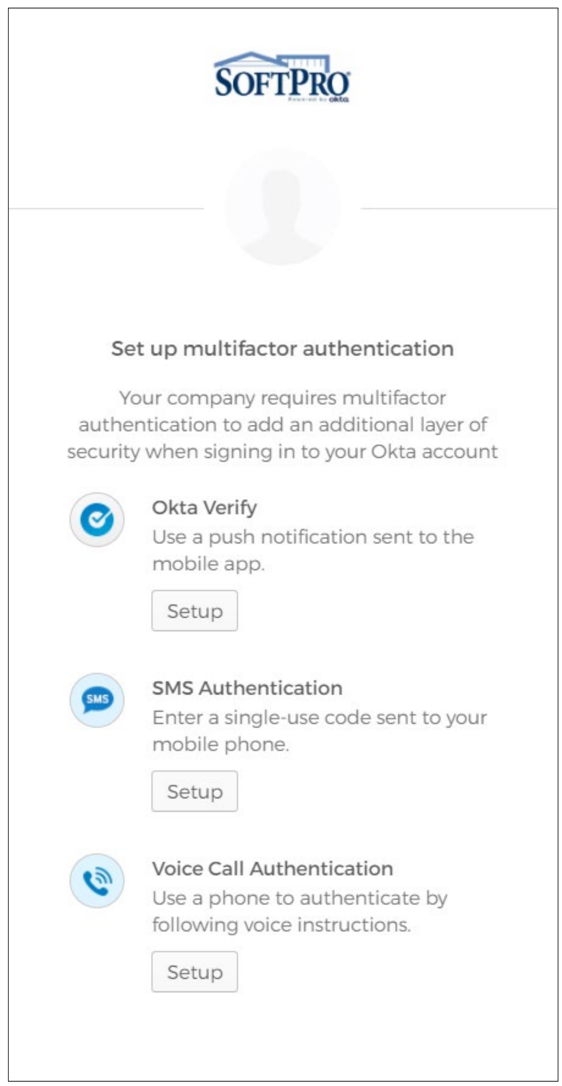
Setting Up Multi-Factor Authentication (MFA)

When logging into ClosingsLIVE after migration, you are prompted to setup your Multi-Factor Authentication (MFA) verification options. Once configured, you are prompted to step through one of the three options available each time you log into ClosingsLIVE.

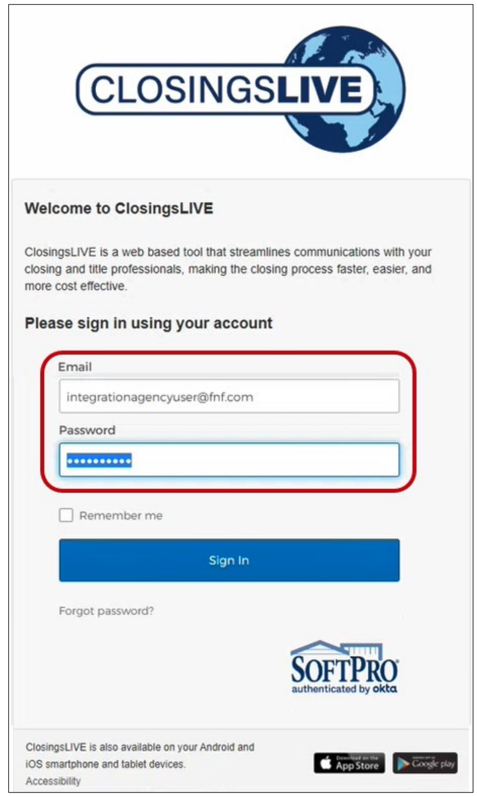
The three verification options available are:

- **Okta Verify** – automatically push a security code via the Okta Verify mobile application.
- **SMS Authentication** – receive a security code via text message on your mobile device.
- **Voice Call Authentication** – receive a security code via automated phone call.

> **BEST PRACTICE:** It is recommended all three options are set up to avoid not having access if one option is not accessible. Once the verification options are created, you select which option is the default verification method when you sign into ClosingsLIVE.



1. Log into ClosingsLIVE

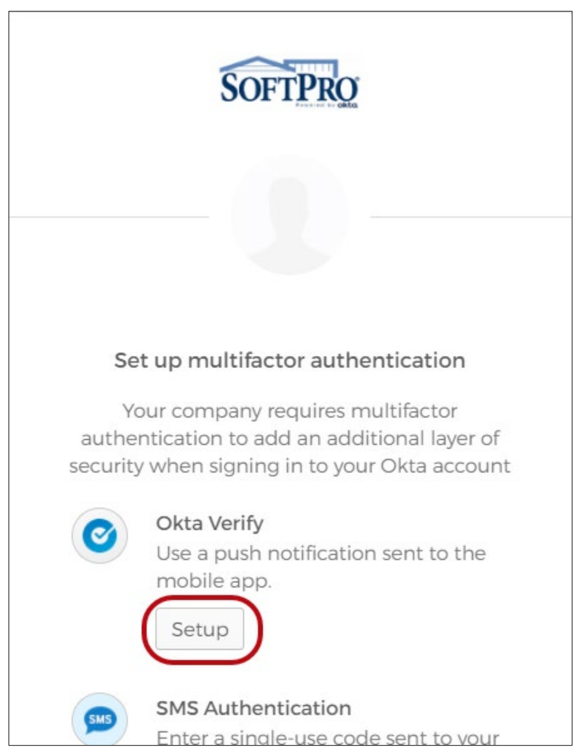


You are immediately prompted to setup your Multi-Factor Authentication.

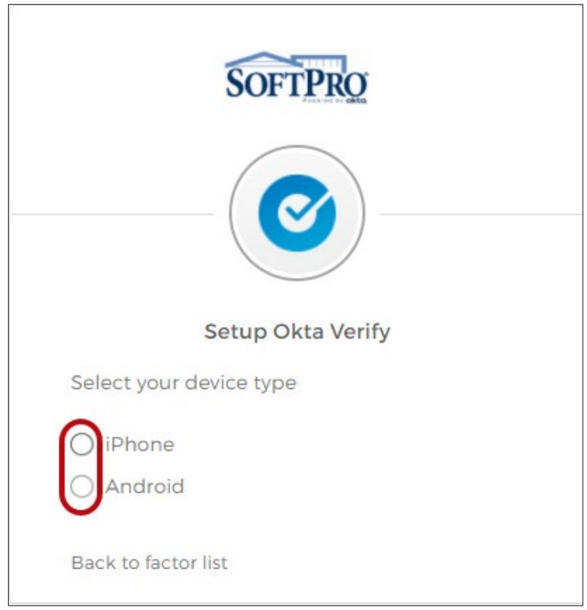
> **REMINDER:** Set up all three options to avoid not having access if one option is not accessible.

Setting Up the Okta Verify Option

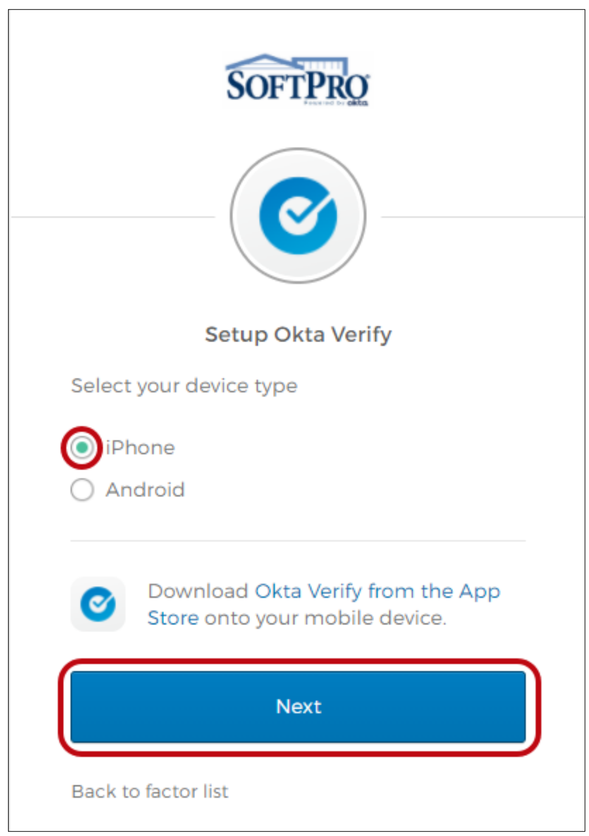
2. Click the **Okta Verify Setup** button



3. From the **Setup Okta Verify** window, check the applicable mobile device



4. Once selected, you are prompted to download the **Okta Verify** app
5. Download and install the Okta Verify app on your phone
6. Click the **Next** button

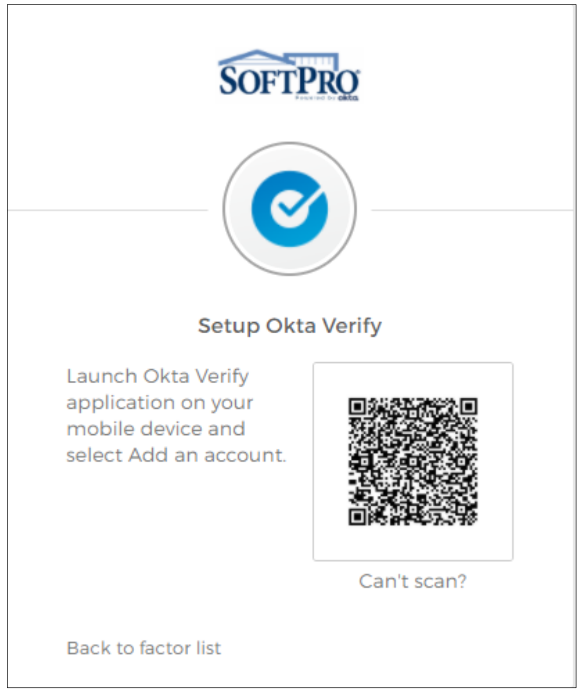


7. Open the camera app on your phone

8. From the **Setup Okta Verify** window, scan the barcode with your camera to send the app to your phone

   To scan the barcode, hold your phone up to the monitor so the camera can read the barcode; you should see a box around the barcode.

   You should be prompted to open in Okta Verify.

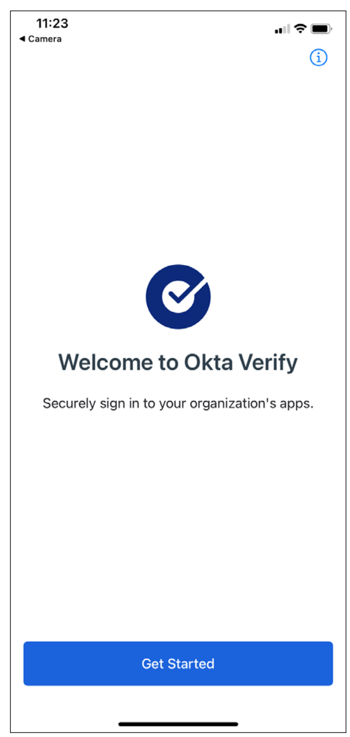


9. Click the **Open in the Okta Verify** message

Once the app launches on your phone,

10. Click the **Get Started** button

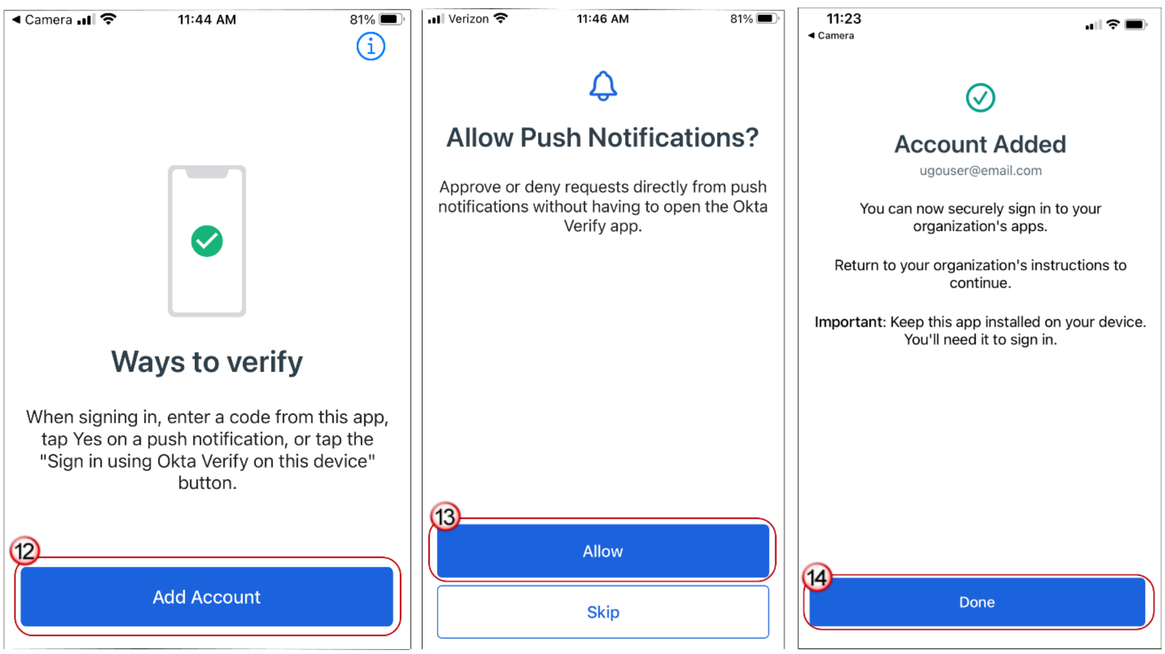
11. Click **Next** to continue through the introduction messages



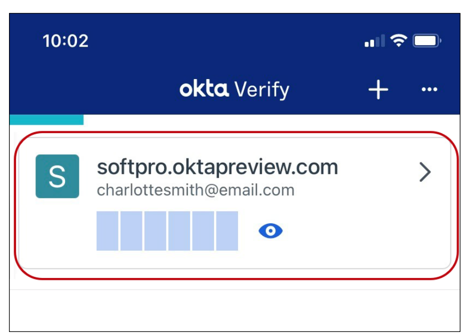
12. From the **Ways to verify** message, click the **Add an account** button
13. From the **Allow Push Notifications** message, click the **Allow** button

> **NOTE:** Allowing push notifications avoids you having to open the app to obtain the code and re-enter when logging into ClosingsLIVE. The code is automatically sent to MFA and proceeds through the verification process.

14. When you see the **Account Added** message, click the **Done** button



The program name and your login are shown in the app. You can now close the app.

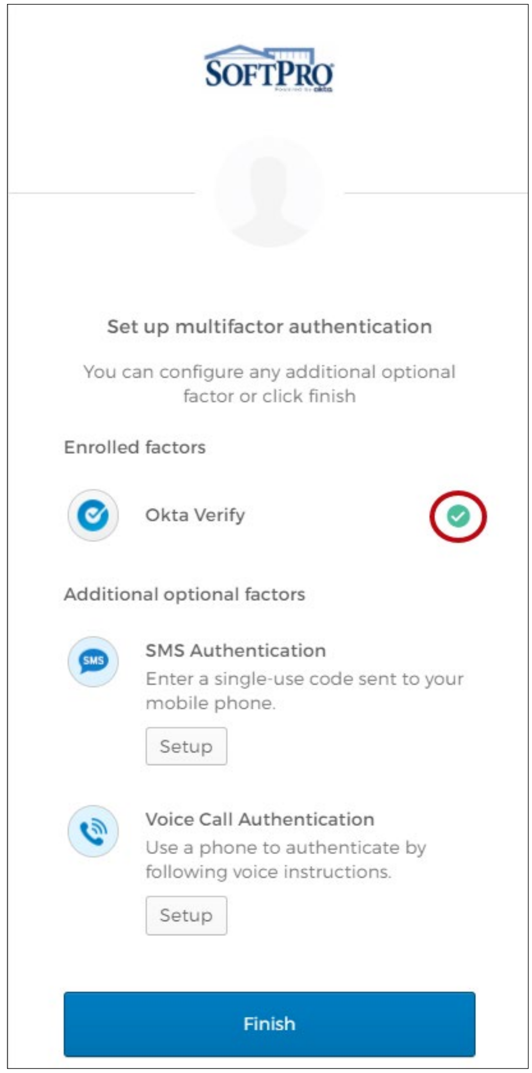


On your computer, you are returned to the **Set up multifactor authentication** window.

The **Enrolled factors** section displays a checkmark next to the **Okta Verify** option to indicate setup is complete for that option and an email is sent to confirming your enrollment.

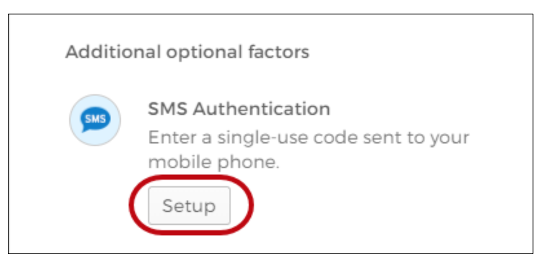
Click the **Finish** button if you wish to exit or continue to setup the additional verification options.

REMINDER: Set up all three options to avoid not having access if one option is not accessible.

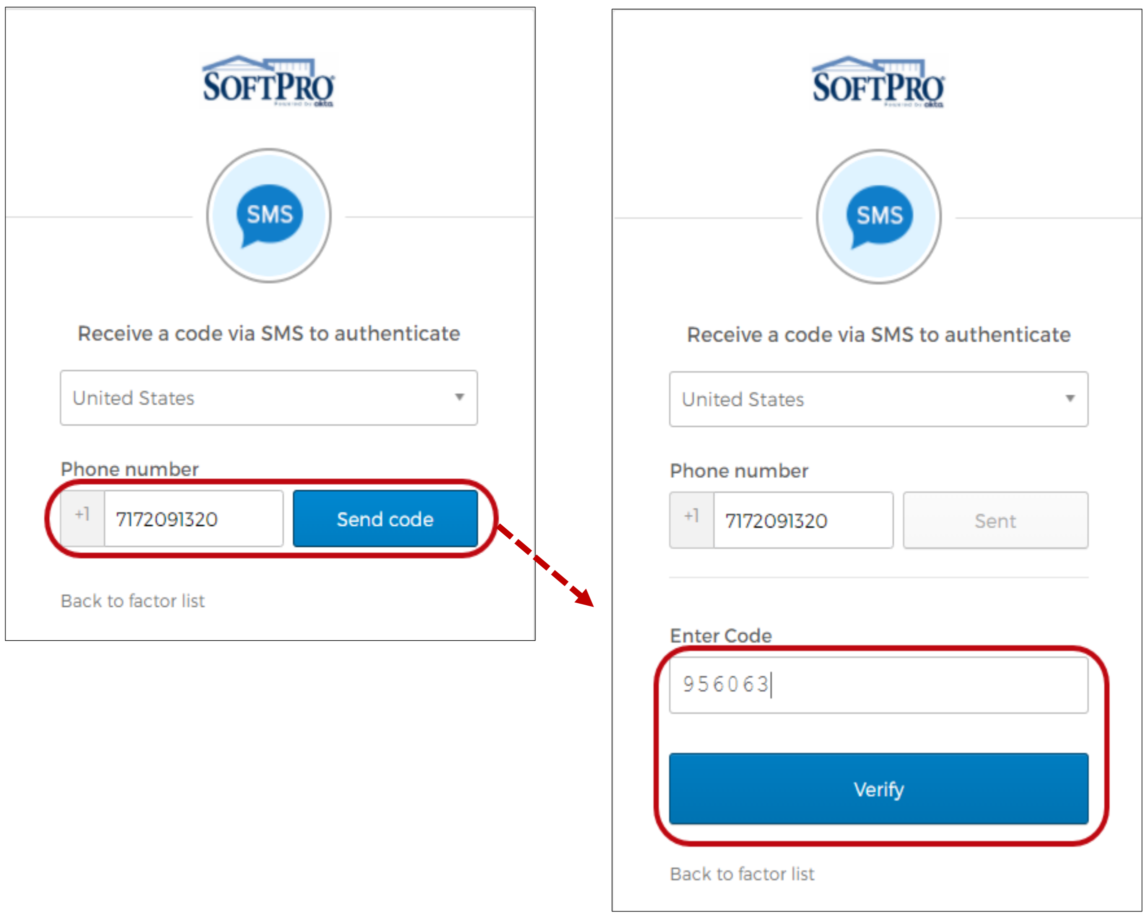


Setting Up the SMS Authentication Option

1. Click the **SMS Authentication > Setup** button



2. When prompted, enter your mobile number
3. Click **Send a code**
4. Enter the code sent to your phone, click **Verify**



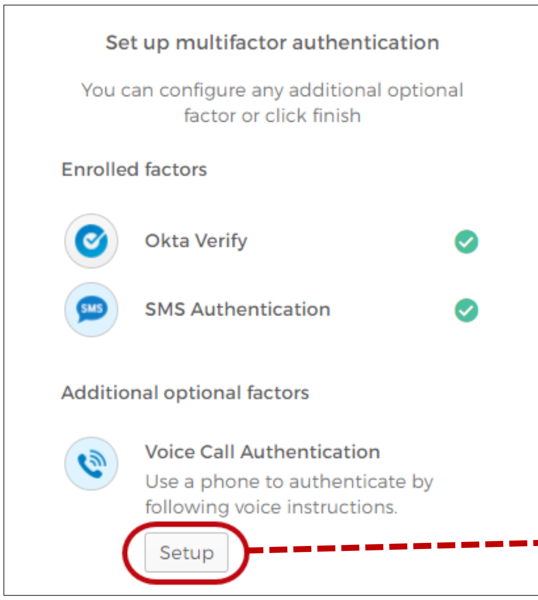
On your computer, you are returned to the **Set up multifactor authentication** window.

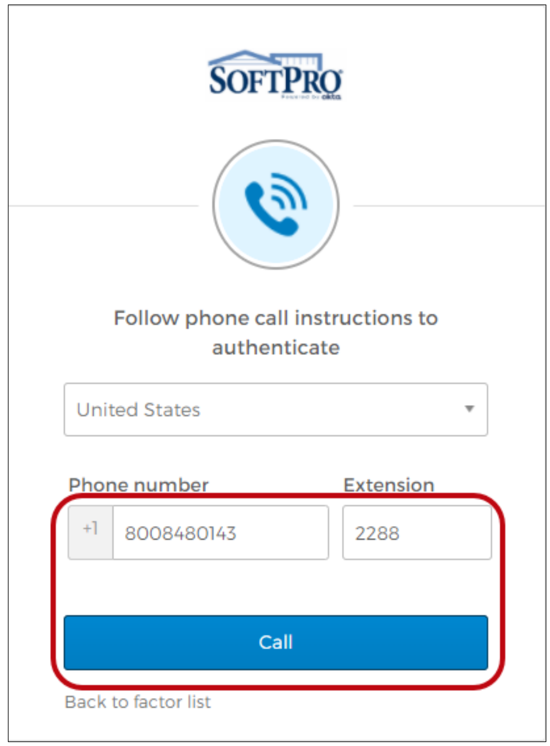
The **Enrolled factors** section displays a checkmark next to the **SMS Authentication** option to indicate setup is complete for that option and an email is sent confirming your enrollment.

Click the **Finish** button if you wish to exit or continue to setup the additional verification options.

Setting Up the Voice Call Authentication Option

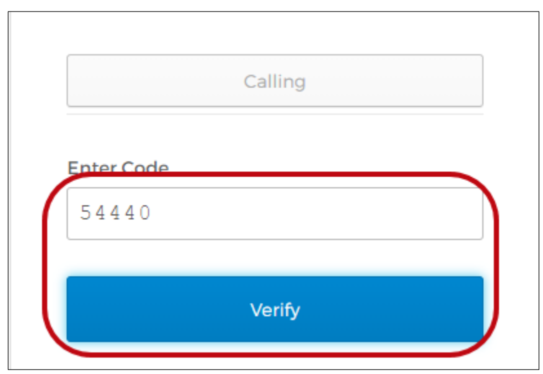
1. Click the **Voice Call Authentication > Setup** button





When you receive the automated call,

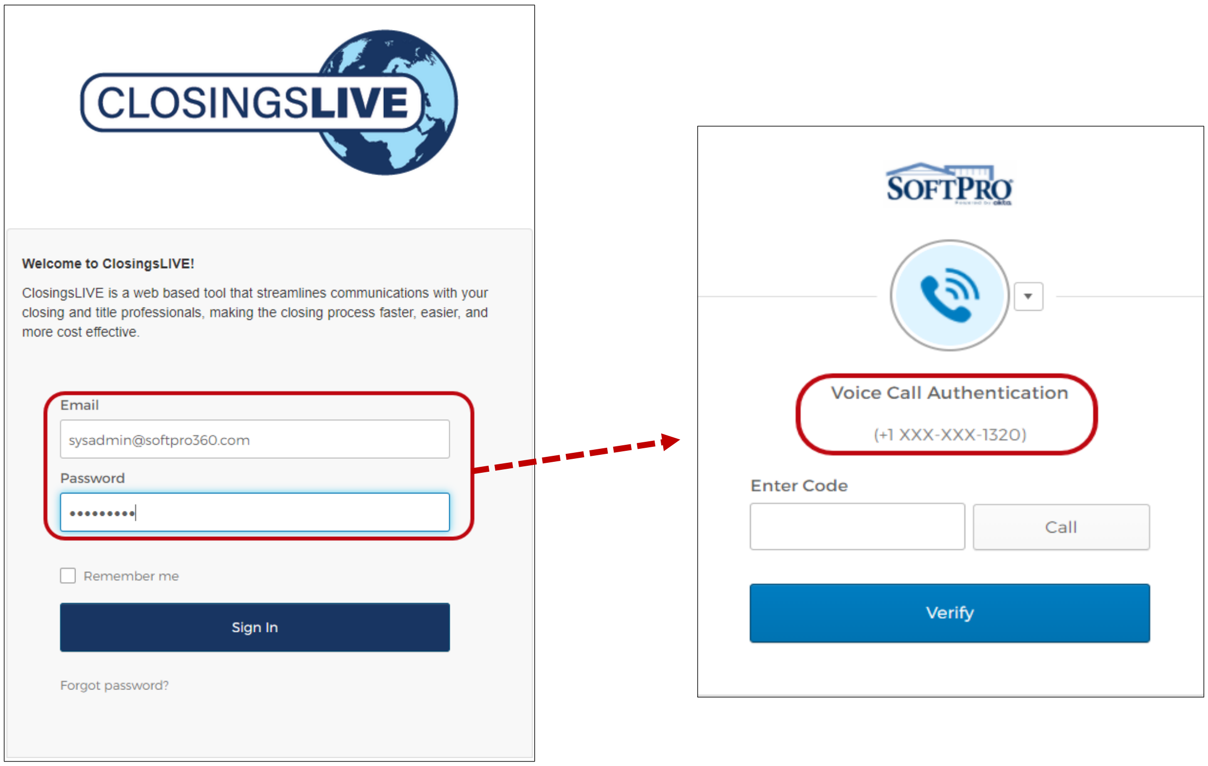
2. Enter the code provided
3. Click **Verify**



An email is sent confirming your enrollment.

Setup is complete and the ClosingsLIVE program opens.

The next time you log into ClosingsLIVE you are required to step through the MFA. The method of verification shown is based on the last verification method used.



Changing Verification Options

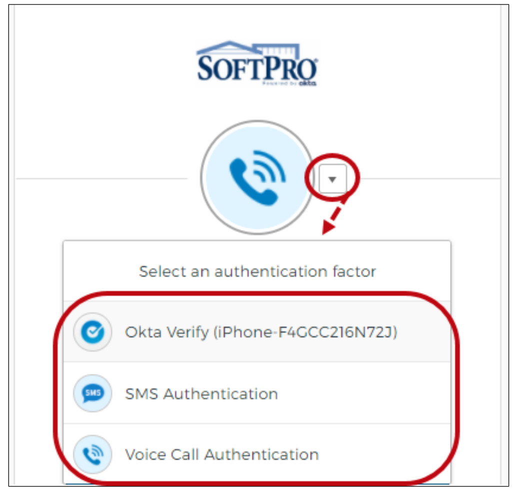
You can change your verification method from the log in window (if two or more are setup) or from the Account Settings within ClosingsLIVE.

- Multiple options setup

  From the Login window,

  1. Click the down-arrow
  2. Select the method you wish to use

  This option remains the default method going forward.

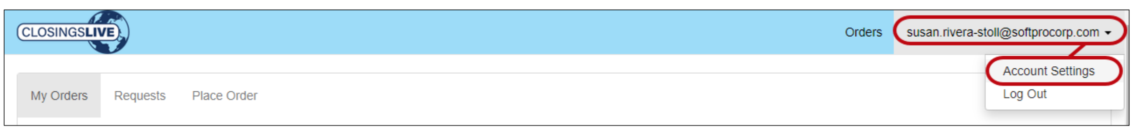


- One option setup

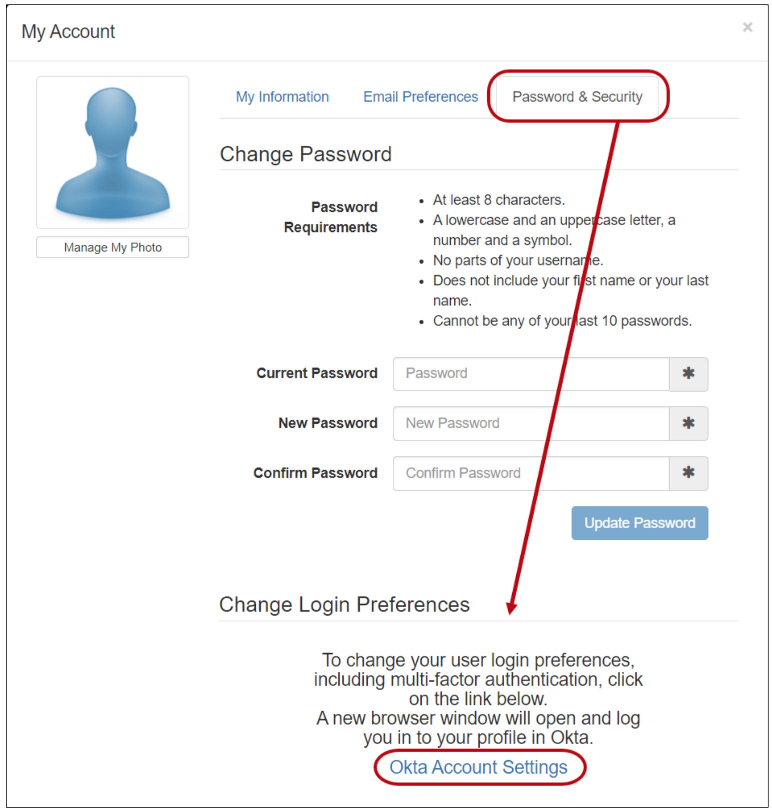
  1. Log into ClosingsLIVE using the current MFA method

  Once logged in,

  2. Click your email address on the toolbar
  3. Select **Account Settings**



4. From the **My Account** screen, click the **Password & Security** tab
5. Click the **Okta Account Settings** at the bottom of the screen



From the **Account** screen, **Edit Verification** section,

6. Click the **Setup** button for the method you wish to setup; options already setup show the **Remove** button.

Refer to the corresponding section above if you have questions on the setup.