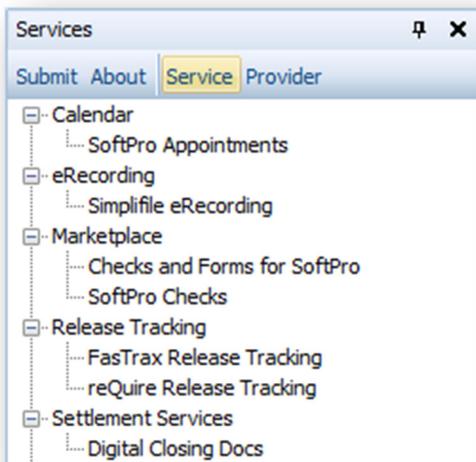
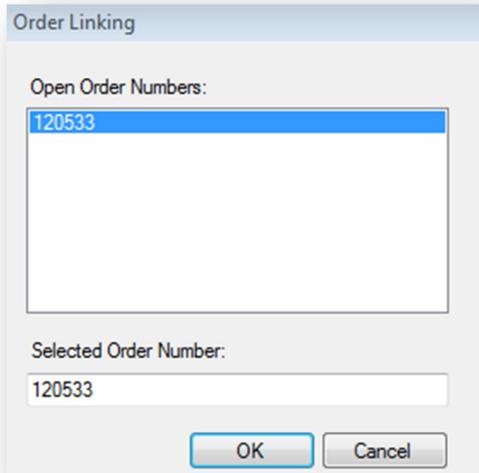


## Managing a Digital Closing Docs Transaction Within SoftPro 360

**Digital Closing Docs** can be found in the **SoftPro 360** Services menu under the Service titled **Settlement Services**. Double click on Digital Closing Docs to create a transaction (or highlight **Digital Closing Docs** and click Submit).



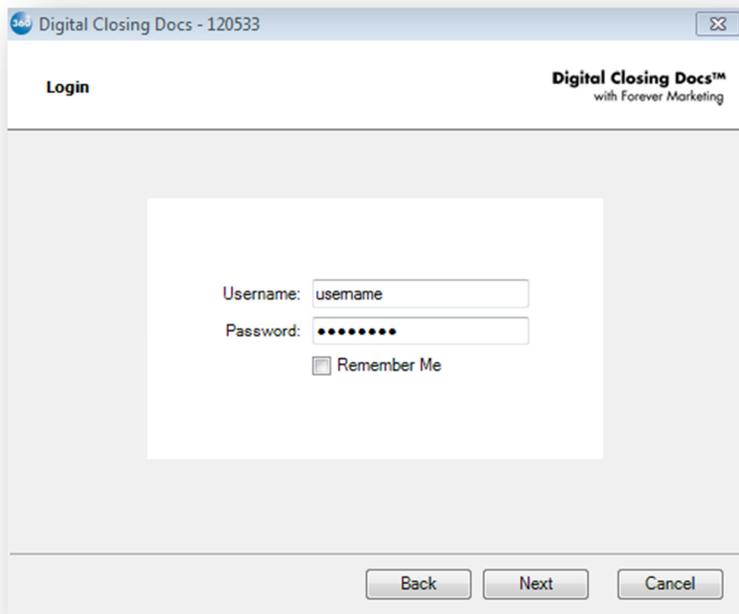
If you already have ProForm order(s) open, they will be listed in the **Order Linking** dialog. The active order will be highlighted and entered in the **Selected Order Number** field. You have the ability to select from any of the open orders, or you may choose to overwrite the **Selected Order Number** with an order that is not currently open. Once you have confirmed the order to link, click **OK** to continue.



The **Welcome** screen provides you with information about **Digital Closing Docs**. You may choose to skip this screen in the future by clicking on the **Skip Welcome Page** option. Click **Next** to continue.



Enter your **Digital Closing Docs** login and password and click **Next** to continue. You can check **Remember Me** to skip the login screen on subsequent uses.



The image shows a screenshot of a web browser window titled "Digital Closing Docs - 120533". The page has a header with "Login" on the left and "Digital Closing Docs™ with Forever Marketing" on the right. The main content area contains a login form with the following elements:

- A "Username:" label followed by a text input field containing the text "username".
- A "Password:" label followed by a password input field with seven black dots.
- A checkbox labeled "Remember Me" below the password field.

At the bottom of the form area, there are three buttons: "Back", "Next", and "Cancel".

Contacts entered into the linked ProForm order are displayed on the left side of the **Contact Selection** screen. Highlight the contact to view the contact's specific information on the right side of the screen. Choose the contact(s) that you wish to add to the **Digital Closing Docs** file by placing a check in the box beside the name. Click Submit to create the **Digital Closing Docs** file.

Digital Closing Docs - 120533

**Contact Selection** Digital Closing Docs™  
with Forever Marketing

Branch: Corporate

B Lary Mitchell  
 B Olivia Mitchell  
 S Sammy Seller  
 M Westview Mortgage  
 LB Maxx Realty  
 SB Southern Realty, Inc.

Name: Sammy Seller  
Contact: Sammy Seller  
Email: sammy@aol.com  
Phone: ( ) - -  
Website: \_\_\_\_\_  
Address: 1234 West Street  
City/State/Zip: Raleigh NC 27609-\_\_\_\_

Back Submit Cancel

NOTE: File information submitted to **Digital Closing Docs** can be viewed by clicking the **Branch** hyperlink.

Digital Closing Docs - 120533

**General Information** Digital Closing Docs™  
with Forever Marketing

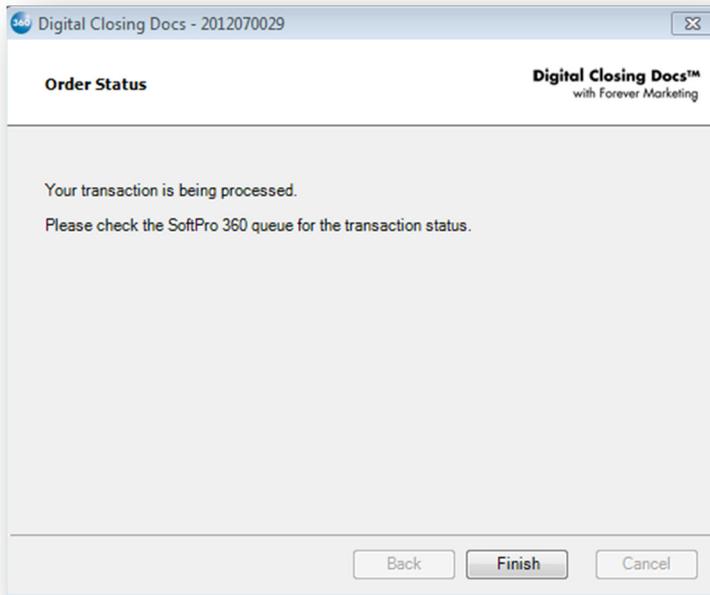
Branch: Corporate

Property Address: 3008 Amsterdam Place  
City/State/Zip: Cary NC 27511-\_\_\_\_

Transaction Type: Purchase Sales Price: 450000.00  
Order Status: In process Loan Amount: 295000.00

Close

Once the transaction has been submitted to **Digital Closing Docs**, the **Order Status** screen will direct you to review the transaction in the SoftPro 360 queue. Click **Finish** to continue.



The SoftPro 360 Queue will update to display the **Digital Closing Docs** transaction. A link to the **Digital Closing Docs** website will be available under the **Description** column. The Status will update to In Progress once the package has been delivered.

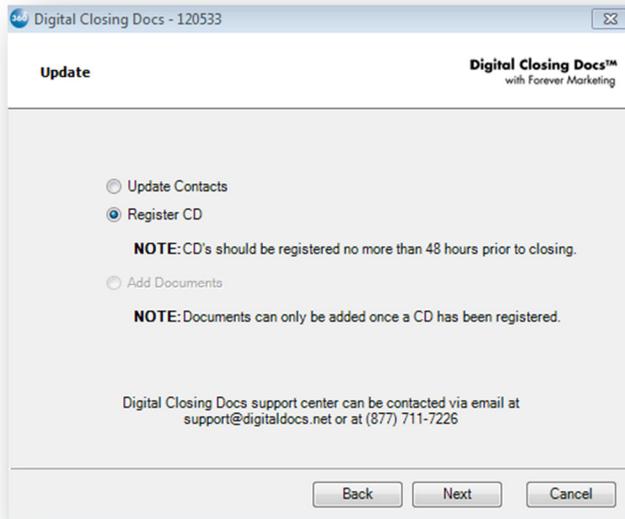
Queue

Review Deliver Views: My Transactions Filter: All Providers

Transaction Number	Provider	Service	Status	Linked Order	Created By	Created On	Completed On	Description
360997-10-120629-004710	Digital Closing Docs	Digital Closing Docs	In Progress	120533	Melanie Rudd	6/29/2012 1:50 PM		<a href="https://www.digitaldocs.net/title/file...">https://www.digitaldocs.net/title/file...</a>

## Updating a Digital Closing Docs Transaction

To add a new contact, register a CD or add documents to a **Digital Closing Docs** file, double click on the transaction in the SoftPro 360 queue.



To register a CD, click **Add CD**. Enter the CD Number, a password and select the party to which the CD applies. Click **Submit**.

A CD's status will be **Incomplete** until all required fields have been completed (CD number, Password & Selected Party). A CD will show a **Pending** status until the CD is registered on the Digital Closing Docs website. A CD with a **Pending** or **Incomplete** status can be removed. Highlight the **Pending** or **Incomplete** CD then click **Remove CD**.

NOTE: CD's with a **Registered** status will need to be removed directly from the Digital Closing Docs website.

Digital Closing Docs - 120533

**Register CDs** Digital Closing Docs™  
with Forever Marketing

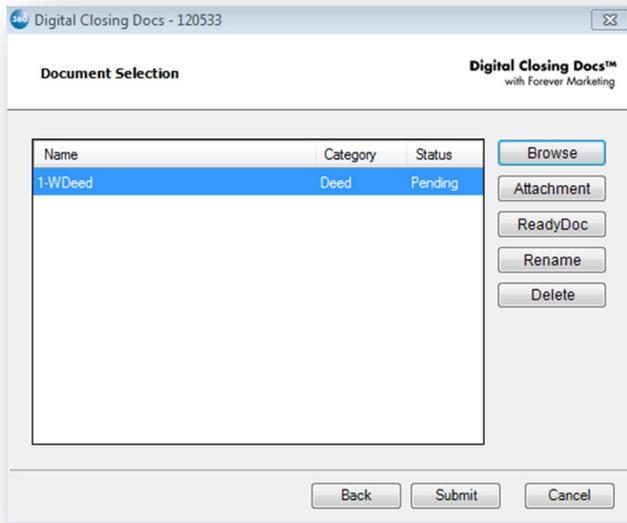
CD Number	Party	Status
123456789011	Larry Mitchell	Pending

CD Number:

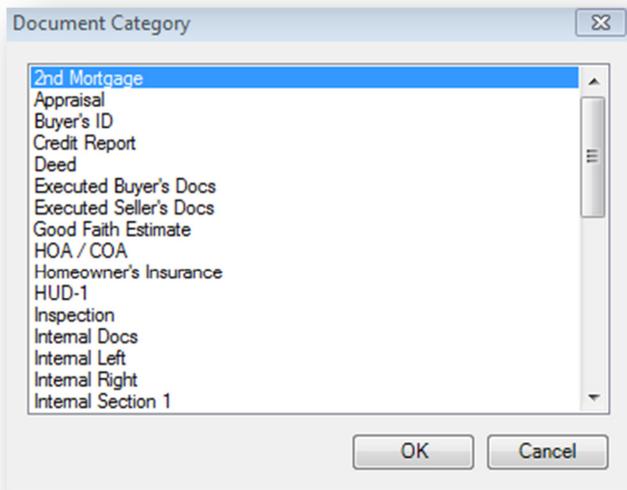
Password:   
Normally last 4 of SSN

Select Party:

The **Document Selection** screen allows users to add document(s) to the **Digital Closing Docs** file. Click **Browse** to attach .PDF or .TIFF documents from any location, **Attachment** to choose documents from the SPImage directory within ProForm or **ReadyDoc** to attach ProForm ReadyDocs. The **Rename** button will rename the highlighted document while the **Delete** button will delete the highlighted document from the list. Click **Submit** to continue. Documents will remain in a **Pending** status until they have been submitted to Digital Closing Docs. Once submitted the document status will update to **Submitted**.



NOTE: When you add a document you must associate it with a **Digital Closing Docs** Document Category.



After 6 months the transaction will automatically update to a **Completed** status in the SoftPro 360 queue. A message will appear in the SoftPro 360 log providing the website for Digital Closing Docs. The link for the specific transaction on the Digital Closing Docs website will still be available in the Description column in the SoftPro 360 queue.

The screenshot displays the SoftPro 360 interface. A 'Log Viewer' window is open, showing a list of messages for transaction 410060-10-120713-004668. The messages are as follows:

Type	Created On	Created By	Message	Res	Res
Info	7/13/2012 4:2...	kathy.cada@s...	Operation Submit requested		
Info	7/13/2012 8:0...	SYSTEM	Operation Task requested		
Info	7/14/2012 8:0...	SYSTEM	Operation Task requested		
Info	7/14/2012 8:0...	SYSTEM	This transaction has been closed in Soft...		

Below the log viewer, a message box contains the text: "This transaction has been closed in SoftPro 360. Please visit Digital Docs at [www.digitaldocs.net](http://www.digitaldocs.net) to access this file."

The main interface shows a 'Queue' section with a table of transactions:

Transaction Number	Provider	Service	Status	Linked Order	Created By	Created On	Completed On	Description
410060-10-120713-004668	Digital Closing Docs	Digital Closing Docs	Completed	2012070082	kathy.cada	7/13/2012 4:27 PM	7/14/2012 8:00 PM	<a href="https://www.digitaldocs.net/title/fi...">https://www.digitaldocs.net/title/fi...</a>