

DomiDocs User Guide

June 2024

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History

Date	Version	Details
04/02/2024	1.0	Original Release
06/21/2024		Revisions to include: <ul style="list-style-type: none">- Update to Adding Documents to include Builder Documents when option selected- Addition of DomiDocs Title Support contact information

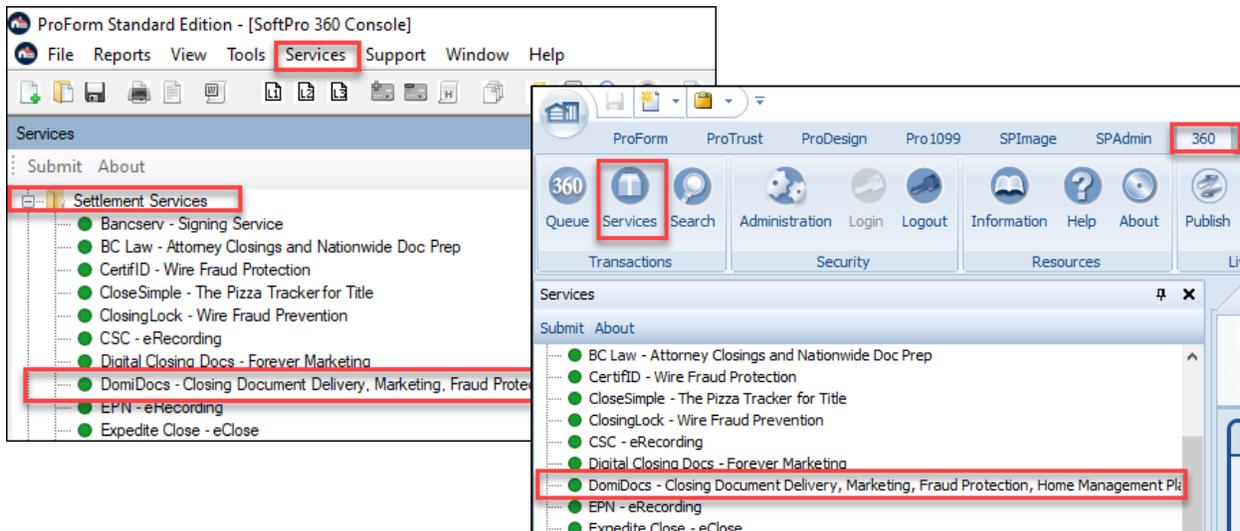
Introduction

DomiDocs allows Agents to sign up to the DomiDocs platform via SoftPro 360. The DomiDocs integration with SoftPro 360 provides users the ability to seamlessly choose a product, create an account and upload documents all within SoftPro 360.

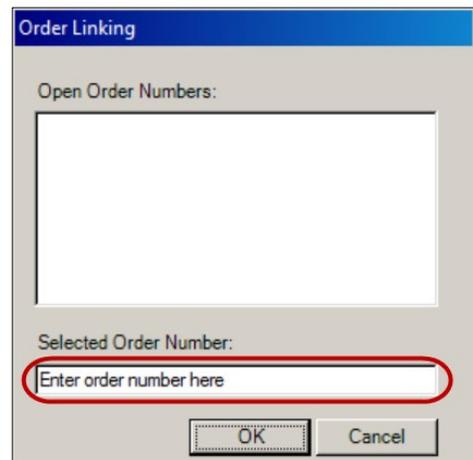
Accessing DomiDocs

From the toolbar:

1. Select the **Services** tab
2. Click the **Settlement Services** folder to expand
3. Double-click **DomiDocs**



4. From the **Order Linking** window
 - a. If no order is open, enter the corresponding order in the **Selected Order Number** field



- b. If a single order is open, the order number is shown in the **Open Order Numbers** field and the **Selected Order Number**

NOTE: The **Selected Order Number** field can be overwritten with an order that is not open.

Order Linking

Open Order Numbers:
FTPA19-05193

Selected Order Number:
FTPA19-05193

OK Cancel

Order number is automatically populated as Selected Order Number

- c. If multiple orders are open, all order numbers appear in the **Open Order Numbers** field and the first order is displayed in the **Selected Order Number** field. Highlight an order in the **Open Order Numbers** field to select the applicable order

Order Linking

Open Order Numbers:
FTPA19-05193
FTPA19-05194

Selected Order Number:
FTPA19-05193

OK Cancel

First order number is automatically populated as Selected Order Number

5. Press the **OK** button to continue

Once a ProForm Order is linked, the **Welcome** screen displays.

You can check the **Skip Welcome Page** check box to skip having the **Welcome** screen display each time you log into DomiDocs.

6. Click the **Next** button to continue or **Cancel** to exit the integration

Welcome

DOMIDOCs®

Awesome welcome information of services offered by the vendor. Who to contact to sign up. Any other details that provide what the vendor does and who they are.

[Link to vendor site](#)

Skip Welcome Page

Next Cancel

Logging into DomiDocs

- The **Login** screen requires a valid username and password be entered.
- Check the **Remember Me** check box to login automatically when launching the integration in future sessions.
If you do not have a valid username and password, click the **Need help logging in** link to open an email to request assistance with login credentials.
- Click the
 - » **Login** button to continue
 - » **Back** button to return to the **Welcome** screen
 - » **Cancel** button to exit the integration and return to the **360 Services** menu

Select Property and Submit Documents

The **Select Property and Submit Documents** screen displays allowing the user to select the,

- **DomiDocs License Agreement:** Select the service agreement to be submitted with the request
- **Uploading Builder Docs** – if applicable, select the **Yes** radio button
- **Property(s):** Information for the properties added within the ProForm order populate the field
 - Changes to the property information

must be done within the ProForm order.

- **Buyers:** User can select the buyer for the account; only one can be selected
- **Add Documents:** Users can add documents prior to submitting the request to DomiDocs.

NOTE: Required fields are identified with a red asterisks  and the Submit button is not enabled until the required information is selected.

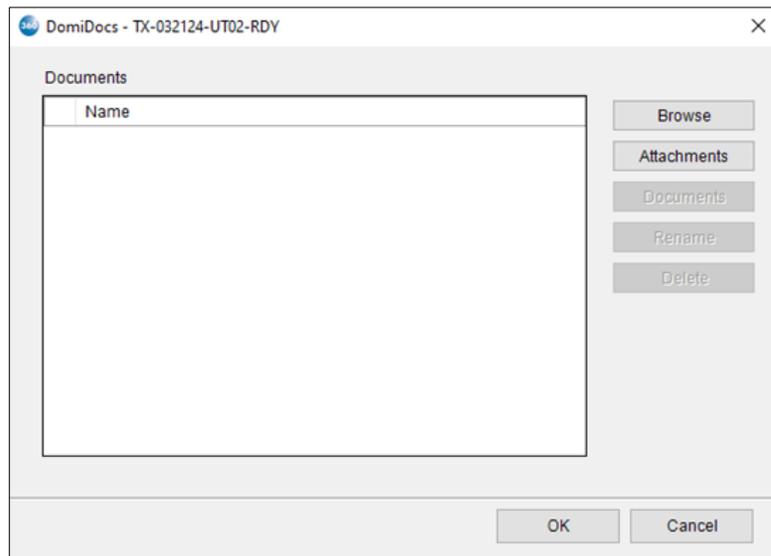
Adding Documents

The **Add Documents** link allows the user to attach documents before submitting the request; including Builder Documents if **Yes** selected for **Uploading Builder Docs** on the prior screen. Use the available buttons to attach your document(s).

- **Browse:** Browse to find documents to submit
- **Attachments:** Attach documents from the ProForm order
- **Documents:** Not applicable to DomiDocs transactions at this time

Once a document(s) is attached, users can,

- **Rename:** Rename the documents
- **Delete:** Delete documents



When all documents have been added, click the **OK** button to close the **Documents** screen and return to the **Select Property and Submit Documents** screen. Clicking the **Cancel** button cancels all documents added in that session and closes the **Documents** screen.

If all required information has been entered, the **Submit** button is enabled and the user can now submit their request to DomiDocs.

The request is shown in the **360 Queue** with a status of **In Progress**.

Updating/Submitting Additional Documents for a Transaction

Documents can be added for a transaction where the **Status** of the transaction in the **360 Queue** is **In Progress**.

1. Highlight the applicable transaction in the **360 Queue**
2. Click the **Next Steps** button to open the **Additional Documents** screen
3. Attach your document(s) if needed, by clicking the,
 - **Browse** button to navigate out to select the document(s)
 - **Attachments** button to select documents from your Select order
4. If applicable, check **Yes** if **Uploading Builder Docs**
5. Click the **Submit** button once all documents have been added



For questions regarding DomiDocs products and services, please contact the DomiDocs Title Support Team at:

Email: titlesupport@domidocs.com

Toll Free: (888) 317-0111, Option 2