

# Exacta Land Surveyors User Guide (v2.0)

4

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#### Introduction

The **Exacta – Land Surveyors** service in SoftPro 360 allows you to submit data from your ProForm order to request survey products, elevation certificates, lien searches, and HOA estoppels and receive those products back into your order.

#### Accessing Exacta – Land Surveyors

1. Open the order you are using to create your Exacta order

NOTE: Exacta – Land Surveyors automatically links to the open, active ProForm order and pulls data from the order for the search. If you do not have an order open when logging into Exacta, you will be prompted to select the

- 2. From the **360** ribbon, click the **Services** button
- 3. Locate the Title Services folder
- 4. Double-click the Exacta Land Surveyors menu option







### Logging into Exacta – Land Surveyors

From the **Exacta** login window, enter your login credentials; click **Login** 

HINT: If you check the **Remember me** check box you are automatically logged in the next time you use the program.



#### **Selecting a Property**

The **Property and Product Selection** screen will display the property(s) in your order, which by default will be selected for inclusion in your product request to Exacta Land Surveyors.

🧀 Exacta Lan	d Surveyors - 210610-TX		×
Property A	nd Product Selection	Land Survey   Lien Search	
Locations:	-Select Locations-	~	*
Property:	1234 Sunny Isles Drive, Hialeah, FL 33018	~	
County:	MIAMI-DADE ~	Parcel ID: 123446	
Product:	Products	Association Name:	
	Boundary Survey		
	Elevation Certificate	Need By Date:	
	Lien Search with Permitting Information	*	*
	Lien Search with NO Permitting Information		
	Estoppel		
	Permitting ONLY Search	Add to Proform Notes	
Notes:		~	
		~	
Attach Do	<u>cuments</u>	Back Submit Cancel	

#### Selecting Product(s)

You must order at least one product (Lien Search, Tax Certificate or HOA Estoppels) for the property selected by performing the following:

- A. Select the property from the dropdown menu to associate it with your product selection(s).
- B. In the Product(s) section, click on the product you are ordering (Lien, Survey and/or Estoppel).
- C. Association Name will autofill from the HOA and HOA Management contact from the linked order.
- D. Need by date is required and must be greater than todays date.

Exacta Lan Property A	d Surveyors - 07012021 nd Product Selection		×
Locations:	Invisible Streams, Inc. C		~
Property:	0701 Lake Shore Drive, Hialeah Gardens, FL 3301	16	~
County:	MIAMI-DADE	Parcel ID: 123446	
Product:		Association Name: HOA TEST Need By Date: 07/08/2021	-
Notes:		,	¢
Attach Do	cuments	Back Submit Cancel	

\*Survey Products will be suppressed if the service is not available for the property county.

#### Adding Optional Information & Submitting your Order

You can optionally add the following information to your request to Exacta Land Surveyors.

- 1. You can add **Notes** and **Documents** to send to Exacta Land Surveyors. The **Add to ProForm Notes** checkbox will be selected by default to add this content to your ProForm's order notes.
- 2. Click Submit to send your order to Exacta Land Surveyors.

#### **Adding Additional Documents**

You can add additional document to a request that is currently **In Progress**:

- 1. Select the **In Progress** transaction from the queue.
- 2. Click on Next Step.

Queue					
📀 Next S	tep 🤤 🖂 📄 Views: A	ctive Order	- 📩	🌛 🗟 🏙 Fil	ter: All Provide
	Provider	Service	Status 👻	Linked Order	Linked
\$	Exacta Land Surveyors	Survey and Lien	Accepted	07282021-RDY	Default
<b>~</b>	Exacta Land Surveyors	Survey and Lien	In Progress	07282021-RDY	Default

- 3. Attached the additional documents to your request.
- 4. Submit the request with the additional documents.



#### **Accepting Documents**

The transaction in 360 will update from **In Progress** to a **Ready** status once 360 receives the documents from Exacta Land Surveyors.

1. Highlight the transaction in the 360 Queue and click **Next Step**.

Queue										
🛇 Next Step 💿 🖂 📋 Views: Ready Transactions 💿 🚽 🚖 🔂 📸 Filter:				Hiter: Exacta	Land Surveyors	- 2				
	Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On	Description	Product	Transaction Number
	Exacta La	Survey and Lien	Ready	07012021	Default	Luisa Liriano	7/7/2021 11:	0701 Lake Shore Drive	Lien Search with NO Permitting In	410060-40-210707-219814
\$	Exacta La	Survey and Lien	Ready	2021020001	Default	Jody Dowling	7/8/2021 1:1	1820 Sevilla Blvd, #207	Boundary Survey	410060-40-210708-219853

 From the Review screen, you will be able to view and Accept documents into your ProForm order. For smartView users, the smartView link is displayed. Opening the folder link allows you to select a smartView folder for importing the documents.

💀 Revi	ew Exac	ta Land	l Surveyors - 07012021		>
≇ Sele	ct All 🗏	Selec	t None		
🗇 Do	cument	s			
$\checkmark$	View	Сору	File Name	File Size (KB)	Transferred
$\checkmark$	<u>k</u>		Boundary Survey	37	100%
$\checkmark$	×.		Invoice	36	100%
			C Accep	t 🥥 Reject	Cancel

#### **Rejecting Documents**

Upon review of the of the documents, you will have the ability to **Reject** the documents if the information is incorrect or needs any changes.

 Click on **Reject**, then in the next window confirm With **Yes** to confirm that you want to continue. You must notify Exacta Land Surveyors via email of your rejection. You may click on the Email hyperlink to send the email.

> Note: The email link may not open automatically if using a web based email client.

🝻 Review Exa	acta Lano	d Surveyors - 07012021	×
로 Select All	🖹 Sele	ct None	
Documer	nts		
View	Сору	File Name File Siz	ze (KB) Transferred
		Boundary Survey 37	100%
		Invoice 36	100%
	Plea have	se reach out to Exacta support team directly if you require a revi a question about this product. Send Email To : <u>info@exactalien.com</u>	sion or
_	Cont Do y	inuing will change the 360 transaction status back to in progress ou want to continue? Yes	No
		🖉 Accept 🧕	Reject Cancel