

Expedite[™] Close User Guide

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Table of Contents

Introduction	5
Launching Expedite™ Close	6
Access from the 360 Services Menu	6
Select	
Standard and Enterprise	6
Order Linking	7
LogIn	
Registration with Expedite™ required	9
Creating a Package	10
Delivery Details Screen	
Package Name	
Package Message	
Package Sent From	
Select	
Standard and Enterprise	
Operation/Branch	
Delivery Method	
Package Expiration	
Setting the Package Expiration Date	
Print and Mail Option	
Document Selection	
Adding a Document	21
Renaming and Deleting a Document	
Adding a Document Message	
Recipients	
Contacts	
Missing Info	
Selecting a Recipient	
Recipient Message	
Messages	
Edit and Review	
Recipients/Assembly	Error! Bookmark not defined.
Changing Assembly	Error! Bookmark not defined.

Requirements for Assembly	Error! Bookmark not defined.
Signing Order	
Return Paper Package To	
Submit	
No templates required	Error! Bookmark not defined.
Templates to be applied manually in Expedite™	Error! Bookmark not defined.
After Submission	
360 Queue	
Transaction Status	
Toolbar features	
Tracking a Package	40
Package Management Screen	
Transaction Log	
Viewing a Pending Package	
Canceling a Package	44
Deleting a Pending Package	45
Recalling a Delivered Package	
Importing a Signed Package	47
Automation	49
Known Issues	54
Delivery Status Updates Delayed	54
Package status messages out of order in Transaction Log	
Bounced email not handled in Expedite™	54
Only one Pending package allowed for an order	54
Duplicate Order Numbers	54
Documents not saving to Attachments in Classic (460610)	55
Appendix	56
Email to Recipient: New Package	
Email to Recipient: Package Expiration Warning	57
Release Notes	58

Introduction

Black Knight, Inc. is a leading provider of integrated software, data and analytics solutions that facilitate and automate many of the business processes across the homeownership lifecycle. **Expedite™ Close** is part of Black Knight's **LoanSphere®** suite of products, providing an electronic closing fulfillment process for all parties to a transaction. Key benefits include secure electronic document delivery service; fall back to print and mail or direct to print when electronic delivery is not an option; automation based on MISMO standards; industry standard MFA consumer authentication and automation and manual work-flow support.

With the SoftPro 360 Expedite[™] Close integration service, SoftPro users can create an e-sign package in SoftPro 360 and send it to **Expedite[™] Close**, where recipients can log in from any location to complete the e-signing process. Once the signing process is completed by all the recipients, Expedite[™] Close returns the e-signed package to 360 where the package can be imported to the linked order. 360 also supports Delivery with Consent and Delivery only delivery methods offered by **Expedite[™] Close** for secure document delivery and audit trail documentation.

Expedite has been globally deployed and can be added to your Services menu at any time. However, an active account with Black Knight for LoanSphere[®] Expedite[™] Close is required to use the SoftPro 360 integration. Contact <u>Black Knight</u> for more information. Also, be prepared to provide your SoftPro 360 Customer Serial Number which you can find on <u>About SoftPro 360</u> screen in ProForm.



Launching Expedite[™] Close

Access from the 360 Services Menu

Select

From the **360** → **Services menu**, double-click **Expedite Close** - **eClose** located under the Settlement Services folder.



Standard and Enterprise

From the Services button on the ProForm toolbar, select Settlement Services and double-click Expedite Close – eClose.



Order Linking

The active ProForm order is automatically linked to the **Expedite™ Close** service.

6	T	H	- 🗎	• •								Order Too	ls
5	~	ProForm	n Pro	Trust	ProDe	sign	Pro 1099	SPImage	S	PAdmin	360	Order	
6	60	0	9		0	0	0		8	\odot			
Q	ueue	Services	Search	Adminis	stration	Login	Logout	Information	Help	About	Publish	Website	
Ŀ	Т	ransaction	IS	Ц	Sec	urity		Res	ources		<u> </u>	ive	
0		Start Pag	ge [Order 2	2018080	361EXP	On	der 2018100	301226	XP X	Order 2	0180420248	EXP
Services		General					0	Expre	ss Or		Active	order is	linked
		Expr	ess Orde	er Entry					_	_	to Exp	edite C	lose.

Figure 1 Select: Active Order

ProForm Standard Edition - 2018070	015.PFD						
File Reports View Document Mot	File Reports View Document Move Tools Services Support Window Help						
	i 🗇 🔎 🕥 🖹 📫 🗰 📸 📥 🥯 🖾 🖬 👘						
EXPEDITECLASS01.PFD (M	lan Folder) - [STD.21.0 - 10/31/2017]						
General General							
Screens: 2018070015.P	FD (Main Folder) - [STD.21.0 - 10/31/2017]						
1) Settle General Order Tracking Title Insurance CDF NC Bar Forms							
2) File N 3) Buyer Screens:							

Figure 2 Classic: Active Order

If more than one ProForm order is open, the top order is linked.

If no order is open, the Order Linking screen opens for you to enter an order number manually.

Order Linking	E S
Open Order Numbers:	
G	Enter order
Selected Order Nue	number here.
ОК	Cancel

LogIn

Expedite[™] Close uses a single sign-on (SSO) process to authenticate SoftPro 360 users when the **Expedite** - eClose service is launched. As a result, you are not required to enter your **Expedite[™] Close** user email and password. Instead, your SoftPro 360 email address is sent automatically when you launch Expedite[™] Close. Your SoftPro 360 email address can be viewed in the **About** button in the 360 Ribbon:



Or in the Services menu in Standard and Enterprise:

Serv	ices	Support	Window	Helj		
	SoftP	ro 360 Co	nsole			
	Adm	inistratior	n			
	Logir	n				
	Logo	ut				
	Help					
	Abou	ıt				
	Add-	Ins		•		
	Development					
	Legacy >					
	QA 🔸					
	Settle	ement Ser	vices	->		
	Tax S	ervices		->-		
	Title	Services		→		
	Tools +					
	Unde	rwriter Se	rvices	•		

Registration with Expedite™ required

The SSO process requires you to be registered as a user in **Expedite™ Close**. If you are not registered or if your SoftPro 360 email address is different from the email address in your **Expedite™** account, this message will display when you launch the service:



If you see this message, contact **Expedite™** to verify your **Expedite™** registration.

Creating a Package

Launching the **Expedite[™] Close** service opens the <u>Package Management</u> screen to allow you to view and manage any packages that have been submitted for the linked order.

Expedite Close - 2018082976EXP					
Package Management		L	oanSpher	e [,] Expedite*	Clos
Package Name	Created On	360 Status	Package Status	Exp. Date	View
test	9/4/2018 1:07 PM	In Progress	Pending	9/9/2018 2:08 PM	e ²
test1	8/31/2018 4:34 PM	Canceled	Deleted	9/5/2018 5:35 PM	函
PostedURL	8/30/2018 2:19 PM	Canceled	Deleted	8/31/2018 3:19 PM	ď
Intermittent2LHJ	8/29/2018 9:31 AM	Rejected	Expired	8/30/2018 10:31 AM	ď
IntermittentLHJ	8/29/2018 9:23 AM	Canceled	Recalled	9/3/2018 10:22 AM	ď
DeleteTestLHJ	8/29/2018 8:28 AM	Canceled	Deleted	8/30/2018 9:28 AM	ď
Add Recall / Delete					ల్ల
					Close

Selecting

Add

opens the **Delivery Details** screen where a new package can be created.

If an existing Package has a Pending delivery status, you will not be able to add a new package.

Expedite Close	- 201810150132E	<Ρ					[×
Package Mana	agement		L	oanSp	her	e [,] Expedite	- Clos	e
Package Nai	me	Created On	360 Status	Package \$	Status	Exp. Date	View]
asdf		10/24/2018 12:0	In Progress	Pending		10/29/2018 12:06	. 🗳	
Test Package		10/18/2018 1:27	Completed	Signed		10/23/2018 2:06	函	
	A pa Expe beer	ckage cannot be add dite to be sent to the n Delivered to the reci	led because an recipients. Ple ipients and try	other packag ase wait until again.	je is wa I that p	iting in ackage has OK		
Add	Recall / Delete						Ű	
						[Close	

See <u>Known Issues</u> for more information.

If no packages have been created for the linked order, the **Delivery Details** screen will automatically open.

Delivery Details Screen

In the **Delivery Details** screen you can configure the package name and from whom it is to be sent. If applicable, and your **Expedite**[™] account allows, you can also configure the operation or branch sending the package, the delivery method, the package expiration date and whether it will be printed and mailed to a recipient if the e-sign delivery process expires.

Expedite Close - 2019050018EXP	×
Delivery Details	LoanSphere ⁻ Expedite Close
Package name:	* 🙀
Package to be sent from:	<check and="" if="" other="" select="" someone="" than="" you.=""></check>
Operation/branch:	360 Test Organization \checkmark
Delivery method:	eDelivery with Signature eDelivery with Signature eDelivery with Consent eDelivery Only eDelivery with Closing
Package delivery expires:	08/13/2019
	Next Cancel

Package Name

A Package Name is required as indicated by the *. When you enter a name, the * will disappear and the

Next button will be enabled, allowing you to proceed to the next screen. The **Package Name** must be unique for the linked order.

Package Message

The icon allows you to add a package level message.

🥯 Expedite Close - 201810	030122EXP
Delivery Details	LoanSphere ⁻ Expedite Close
Package name:	Closing Package
Package to be se	Wessage - Closing Package
Operation/branch:	This is the closing package for today's closing. Thank you!
Delivery method:	
Package delivery ex	* Message limited to 4000 characters.
📝 Print and mail pa	Save Clear Cancel
	Next Cancel

See the <u>Messages</u> section for more details on handling messages.

Package Sent From

When a package is ready to be viewed or signed, or is about to expire, **Expedite^m** sends an email to the <u>Recipient</u>. The full name, email address and phone number appear in the signature block for the person from whom the package is sent. See the <u>Appendix</u> for examples of these email notifications.

<u>Select</u>

The package will be sent from you unless the **Package to be sent from** checkbox is checked. When checked, the dropdown list displays the name and email address of the Escrow Officer/Closer, Pre-closer/Escrow Assistant and the Title Officer, if those people have been added to the linked order.

G Status			
Who has the file:			
Comments:			
Title Status			
Title office:	T Trusty Title Co	Title officer/Examiner:	Lizanne H Jenkins
Date/time title opened:	(None)	Opened by:	•
Title status:	•		
Date/time title completed:	(None) 💌	Completed by:	•
Comments:			
Escrow Status			
Escrow office:	A Safe Settlement	Escrow officer/Closer:	Ellen Escrow
		Pre-closer/Escrow assistant:	Able Assistant 💌
Date/time escrow opened:	(None)	Opened by:	•

🥹 Expedite Close - 201810090129EX	P
Delivery Details	LoanSphere [•] Expedite ⁼ Close
Package name:	Closing Package
Package to be sent from:	Ellen Escrow (ellen.escrow goutlook.com)
Operation/branch:	Ellen Escrow (ellen.escrow@outlook.com) Able Assistant (Able.Assistant@email.com) Lizanne H Jenkins (lizanne.jenkins@softprocorp.com) Softpro

If one of these people has been selected for a package that selection will persist for the next package added for the linked order.

Standard and Enterprise

Expedite[™] requires an email address for this feature. Standard and Enterprise only handle the name for the officer and closer fields. When launching **Expedite[™] Close** from Standard or Enterprise, this message will appear:



Selecting OK returns you to the **Delivery Details** screen, and the **Package to be sent from:** checkbox will be disabled.

Operation/Branch

In **Expedite's** Admin module, a user is assigned to one or more **Divisions**. These **Divisions** are displayed in **Operation/branch** dropdown of the **Delivery Details** screen:

Transactions Templates	Admin 🗸				
Edit User		Expedite Close - 201810090129EX	ζp		
Unique Identifier lizanne.jenkins@softprocorp.com	Email lizann	Delivery Details		LoanSph	ere [,] Expedite= Close
Division setup in Expedite		Package name:	Closing Package		
		Package to be sent from:	Ellen Escrow (ellen.escrow	v@outlook.com)	
Divisions		Operation/branch:	Softoro		
Find division			Softpro Softpro Operations A		
Assign user to all divisions		Delivery method:	Softpro Operations B Delivery with Signature		
Softpro			Oefault		
/Softpro/Softpro Operations A	λ		O Default		
/Softpro/Softpro Operations E	3		O Default		

If you have only one **Division** assigned to you in **Expedite**[™], then only one **Operation/branch** will display in the dropdown. The **Operation/branch** you select will determine the **Delivery methods** and other features you are permitted to select.

For SmartView Users: If SmartView is linked to the ProForm order, and more than one **Division** has been assigned to you, the **Operation/branch** dropdown will default to the that of the Escrow Officer in the ProForm order, provided that the Escrow Officer's email address in Select matches the Escrow Officer's email address in **Expedite**[™].

Delivery Method

360 supports four **Expedite**[™] delivery methods: eDelivery with Signature, eDelivery with Consent, eDelivery only and eDelivery with Closing. The **Delivery methods** for an **Operation/branch** is set up by Black Knight's customer implementation team and are displayed in the **Delivery method** dropdown:

Expedite Close - 2019050018EXP		×
Delivery Details	LoanSphere [®] Expedite	- Close
Package name:	Closing Package	
-		_
Package to be sent from:	Ellen E Escrow (ellen.escrow@outlook.com)	~
Operation/branch:	360 Test Organization	~
Delivery method:	eDelivery with Signature	~
	eDelivery with Signature eDelivery with Consent eDelivery Only	
	eDelivery with Closing	

Package Expiration

Setting the Package Expiration Date

- Required for eDelivery with Signature, eDelivery with Consent and eDelivery with Closing
- Default expiration dates and times are set up for an **Operation/branch** by Black Knight's customer implementation team.

The earliest expiration date, latest expiration date and default expiration date and times are displayed in the **Package delivery expires** date picker.

🥹 Expedite Close - 2018100901298	XP 💽
Delivery Details	LoanSphere [®] Expedite [®] Close
Operation/branch:	Softpro
Delivery method:	Enabled for SoftPro
Package delivery expires: Default date	10/14/2018 01:07 PM Earliest date October, 2018 Sun Mon Tue Wed Thu E sat 10 11 12 13
	Latest date Next Cancel

• If permitted for the **Operation/branch**, you may change the **Package delivery expires** date from the default date displayed.

• If not permitted for the **Operation/branch**, then the date picker will be disabled, showing only the default package delivery expiration date and time.

🥹 Expedite Close - 201810090129E	XP
Delivery Details	LoanSphere ⁻ Expedite Close
Operation/branch:	Softpro Operations A
Delivery method:	Delivery with Signature
Package delivery expires:	10/14/2018 T 01:31 PM
🔲 Print and mail package u	pon expiration
	Next Cancel

• The Package delivery expires date and time fields are not displayed for eDelivery only packages.

😳 Expedite Close - 201810090	129EXP	
Delivery Details		LoanSphere [.] Expedite Close
Operation/branch: Delivery method:	Softpro Operations B	•
		Next Cancel

Package in View Only mode

Packages set for **eDelivery with Closing** allow for a View Only period, after which the package becomes available for signing. A **Package is in View Only mode until:** setting is displayed for this **Delivery method.**

Expedite Close - 2019050018EXF	P	×
Delivery Details	LoanSphere ⁻ Expedite Close	?
Operation/branch:	360 Test Organization	
Delivery method:	eDelivery with Closing	
Package is in View Only mode until: Package delivery expires: Print and mail package u	08/11/2019 09:31 AM August 2019 Sun Mon Tue Wed Thu Fri Sat 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31	
	Today: 8/9/2019 Next Cancel]

A default date populates the date field based on the implementation settings for the **Operation/branch** in **Expedite**[™]. Once the **View Only** period expires, the package is available for esigning.

Print and Mail Option

The **Division** setup in **Expedite**[™] also determines whether the **Users** in that **Division** can choose to have the package printed and mailed to the recipients if the package delivery process expires.

- Available only for eDelivery with Signature, eDelivery with Consent and eDelivery with Closing delivery methods
- If permitted for the **Operation/branch**, the checkbox will be displayed and you may check the checkbox.
- If not permitted for the **Operation/branch**, the checkbox will not be displayed.

Expedite Close - 201810090129EXP	
Delivery Details	LoanSphere Expedite Close
Operation/branch: Softpro Operations A Delivery method: Delivery with Signature	-
Package delivery expires: 10/14/2018 The other of the other of the other othe	Operation/branch: Softpro Operations B Delivery method: Delivery with Signature
Print and mail option available for Softpro	Package delivery expires: 10/10/2018 🛛 🕶 01:48 PM 🚖
Operations A but not for Solipro Operations B	Next Cancel

• If the print and mail option is checked, the package recipients must each have a complete mailing address in the ProForm order. See <u>Recipients</u> for more information.

Document Selection

Adding a Document

ecting in the Delivery Details screen opens the Docu	ument Selection	n screen.	
Browse opens your desktop browser. Double-clic te the Desuments grid	cking on a selec	ted docun	nent add
to the Documents grid.			
Attachments opens:			
 SmartView folder tree and documents list for Select, 	t/SmartView use	ers,	
 Attachments folder tree and documents list for Sele 	ect users, and		
 Attachments documents list for Classic users. 			
Documents opens the SmartView folder for Impact use	sers.		
allows you to change the order of the documer	nts as they will a	appear to a	a Recipie
			X
Expedite Close - 2019050018EXP			×
	bara: Evas	dita" Cl	
		une un	use
Documents in this package:			
Documents in this package:	Size	Message	
Documents in this package: Name Borrower Statement	Size 0.05 MB	Message	
Documents in this package: Name Borrower Statement Disclosure of Lenders and Owners Title Insurance Charges Escrew Instructions	Size 0.05 MB 0.06 MB 0.12 MB	Message	
Documents in this package: Name Borrower Statement Disclosure of Lenders and Owners Title Insurance Charges Escrow Instructions eSign Docs	Size 0.05 MB 0.06 MB 0.12 MB 0.49 MB	Message	
Documents in this package: Name Borrower Statement Disclosure of Lenders and Owners Title Insurance Charges Escrow Instructions eSign Docs	Size 0.05 MB 0.06 MB 0.12 MB 0.49 MB	Message	Î
Documents in this package: Name Borrower Statement Disclosure of Lenders and Owners Title Insurance Charges Escrow Instructions eSign Docs	Size 0.05 MB 0.06 MB 0.12 MB 0.49 MB	Message	Î
Documents in this package: Name Borrower Statement Disclosure of Lenders and Owners Title Insurance Charges Escrow Instructions eSign Docs	Size 0.05 MB 0.06 MB 0.12 MB 0.49 MB	Message	↑ ↓
Documents in this package: Name Borrower Statement Disclosure of Lenders and Owners Title Insurance Charges Escrow Instructions eSign Docs	Size 0.05 MB 0.06 MB 0.12 MB 0.49 MB	Message	↑ ↓
Documents in this package: Name Borrower Statement Disclosure of Lenders and Owners Title Insurance Charges Escrow Instructions eSign Docs	Size 0.05 MB 0.06 MB 0.12 MB 0.49 MB	Message	↑ ↓
Documents in this package: Name Borrower Statement Disclosure of Lenders and Owners Title Insurance Charges Escrow Instructions eSign Docs	Size 0.05 MB 0.06 MB 0.12 MB 0.49 MB	Message	
Documents in this package: Name Borrower Statement Disclosure of Lenders and Owners Title Insurance Charges Escrow Instructions eSign Docs Browse Attachments Documents Rena	Size 0.05 MB 0.12 MB 0.49 MB	Message	
Documents in this package: Name Borrower Statement Disclosure of Lenders and Owners Title Insurance Charges Escrow Instructions eSign Docs Browse Attachments Documents Rena * Document with more than 250 pages may cause the package submission to fat	Size 0.05 MB 0.06 MB 0.12 MB 0.49 MB	Message	

Renaming and Deleting a Document

- Rename opens a dialogue box for you to enter a new name for the selected document.
- Delete removes the selected document from the package. A message box will open to

confirm that you want to delete the document.

Name		Size	Message		
Borrower Statement Disclosure of Lenders and (SoftPro 360 ×	7.05 MB).06 MB			
eSign Docs Escrow Instructions	Are you sure you want to delete the document?).49 MB) .12 MB		1	
	OK Cancel			Ļ	
Browse Att	achments Documents Rename	[)elete		
Document with more than 250 pages may cause the package submission to fail.					
	Back	Next	Car	icel	

• **Expedite**[™] requires each document to have a unique name. If you try to add a document with the same name this message will appear:



• Selecting CK closes the message box and opens the Rename Document dialogue box to allow you change the document name and add it to the grid.

Name		Size	Message
Borrower Statement		0.05 MB	
Disclosure of Lenders and Ow eSign Docs Escrow Instructions	Rename Document X Name Borrower Statement OK	0.06 MB 0.49 MB 0.12 MB	
Browse Attac	hments Documents Rename	C)elete

Adding a Document Message

Selecting the icon adds a message that will be displayed to all **Recipients** signing the document.

🐵 Expedite Close - 20	19050018EXP ×
Document Selectio	n Loan Sphere ⁻ Expedite Close
Documents in this Name Borrower State Disclosure of Le eSign Docs Escrow Instructio	Message Borrower Statement × Explanatory message to display for this document: Please note the change to the County Taxes adjustment. Please note the change to the County Taxes adjustment. • Message limited to 4000 characters. Save Clear Cancel
Browse * Document with mo	Attachments Documents Rename Delete ore than 250 pages may cause the package submission to fail. Image: Comparison of the package submission of the package submission to fail. Image: Comparison of the package submission of t
	Back Next Cancel

See the <u>Messages</u> section below for more details on handling messages.

Recipients

Contacts

Selecting Next in the **Documents Selection** screen opens the **Recipients** screen which displays the Names of the individual Buyer/Borrowers and Sellers, the Corporate officers/signees for Organization Buyer/Borrowers and Sellers, and the People for all other Contacts in the linked order.

Expedite	Close - 201	810100131EXP			- ×
Recipien	ts		LoanSphere ⁻ Exp	edite" C	lose
Selec	t who shou	Id receive the documents.			
Selec	t Contact Code	Name	Missing Info	Message	•
	В	Bill Buyerson			
	В	Barbara Buyerson			
	B2	Otto Borrower	A		
	S	Sam Seller			
	S	Sally Seller	A		E
	L L	Larry Lender	<u> </u>		
	A	Cathy Closer	<u> </u>		
	A	Ellen Escrow			
	E	Ellen Escrow			
	LB	Linda Listerman			
	0	Nancy O'Notary	A		
	SB	Billy Bob Buyersquy			-
* At least one Recipient is required to submit a Package.					
Back Next Cancel					

Missing Info

A person may not have sufficient information in the linked order to send a package. The A icon indicates that required information is missing. You will not be able to select that person as a **Recipient** for the package or add a message for that person until the required information has been added to the linked order.

Clicking on the Name of a person opens an information box and identifies the missing information with an *.

Recipients						
Select	who shou	Id receive the documents.		1		
Select	Code		Name	Missing Info	Message	
	В	Bill Buyerson				
	В	Barbara Buyerson				
Г	B2	Otto Borrower				
	S	Sam Seller				
Г	S	Sally Seller				=
Г	L	Larry Lender		Δ		-
Г	A	Cathy Closer	Sally Seller			-
	A	Ellen Escrow				
	E	Ellen Escrow	First Name: Sal	ly		
	LB	Linda Listerman	Middle Name:			
Г	0	Nancy O'Notary	Last Name: Sel	ler		
	SB	Billy Bob Buyersquy	Sumix: Email Address: liza	nne healev-sm	ith@softproce	orn com
			Street Address: 123	Any St	in Georgeood	
* At lea	st one Re	cipient is required to subn	City / State / Zip: Sea	attle, WA 98765		
			Cell or Home Phone: 🙀	1		
			The missing data is required	d for the type of	delivery serv	ice requested
						Close

All packages require **Recipient's** First Name, Last Name, Email Address (correctly formatted) and a Cell or Home Phone number. If the <u>Print and Mail</u> option has been selected in the **Delivery Details** screen, Street Address, City, State and Zip are also required.

Selecting a Recipient

At least one Recipient is required to submit a package to **Expedite™**. Selecting a Recipient enables the

Next button.

Recipient Message

When a Recipient has been selected, the \bowtie icon is enabled, allowing you to send a message to the Recipient.

🥯 Exp	pedite C	lose - 201	810100131EXP				8
Rec	ipients		LoanSph	nere [.] Exp	edite= C	los	5e
1	Selectv	vho shou	Id receive the documents.				
	Select	Contact Code	Name	Missing Info	Message	Â	
	V	В	Bill Buyerson				
		B	Barbara Buyerson				
		- ¹ 🕹	Message Barbara Buyerson		⊒ <u>∼</u>		
		\$	Message for recipient:			E	
		L	Hi Barbara! Let me know if you have any questions. Thank you!				
		E					
		L					
		C				-	
		S		Ψ.			
,	* At leas	st on	Message limited to 4000 characters.		_		
			Save Clear	Cancel			
			В	ack N	ext C	ance	

Clicking the Save button closes the Message box. The save icon indicates that a message has been saved.

🕹 Ex	Superative Close - 201810100131EXP					×
Recipients				Exp	edite= Cl	ose
	Select who should re		Id receive the documents	ng Info	Message	1
	V	B	Bill Buyerson			
	V	В	Barbara Buyerson			
		B2	Otto Borrower	\triangle		

Messages

Expedite[™] **Close** provides three levels of messaging for a package:

- <u>Package</u> level: viewable by all **Recipients**
- <u>Document</u> level: viewable by the **Recipients** signing that document
- <u>Recipient</u> level: viewable only by that **Recipient**

Entering a message, enables the Save and Clear buttons.

- Selecting the Save button, saves the message and closes the Message box. When a message has been saved the message icon changes to .
- Selecting the Clear button deletes the entire message without the need to manually delete it.
- Selecting the **Cancel** button closes the **Message** box without saving any changes.
- If a saved message is opened, changing the message enables the Save button, and the
 Clear button deletes the message entirely.
- When a previously saved message has been cleared, the Save button saves the empty message and the message icon will return to .

Assembly

Selecting Next in the **Recipients** screen opens the **Assembly** screen which displays a grid with the selected **Documents** and **Recipients**.

xpedite Close - 2019050018EXP			
sembly		LoanSphere B	xpedite" Clos
ndicate which documents each recipi	ent should receive.		
	Bill Buyerson	Barbara Buyerson	Sam Seller
Borrower Statement	\checkmark		\checkmark
Disclosure of Lenders and Owne	\checkmark		\checkmark
Escrow Instructions	\checkmark		\checkmark
eSign Docs	\square		
		All documents ar checked by	nd recipients default
		Back	Next Cancel

Each document must have at least one recipient checked and each recipient must have at least one

document checked. If this condition is not met, the **Next** button will be disabled and the gird will shade the problem cells yellow:

360	Expedite Close - 2019050018EXP			×			
A	Assembly LoanSphere' Expedite" Close						
I	ndicate which documents each recip	ient should receive.					
		Bill Buyerson	Barbara Buyerson	Sam Seller			
	Borrower Statement	\checkmark					
	Disclosure of Lenders and Owne	\checkmark	\checkmark				
	Escrow Instructions	\checkmark					
	eSign Docs						
	*Each document must have at least	Disa one recipient and each re	abled ecipient must have t least	one document selected.			
			Back	Next Cancel			

If no **Recipients** will be viewing a document or a **Document** doesn't need to be viewed by any **Recipient**, then

- Select the Back button to return to the <u>Recipients</u> screen where you can unselect the **Recipient**, or
- Go back to the <u>Document Selection</u> screen where you can delete the **Document** from the package.

Selecting the Next button in the Assembly screen, opens the Edit and Submit screen. This screed isplays the Delivery Details, Recipients, Documents and Assembly you selected. Selecting the $ earrow ic $
displays the Delivery Details, Recipients, Documents and Assembly you selected. Selecting the \checkmark ic next to a heading, opens that screen where you can make changes. Selecting Next through t wizard screens returns you to the Edit and Submit screen. Expedite Close - 2019050018EXP Edit and Submit Delivery Details Package name: Closing Package Revealed Belivery Method: eDelivery with Signature Expiration date: 08/13/2019 06:04 PM Operation/branch:360 Test Organization Template Mapping Method: Manual mapping after Submit
next to a heading, opens that screen where you can make changes. Selecting Next through t wizard screens returns you to the Edit and Submit screen. Expedite Close - 2019050018EXP × Edit and Submit Close - 2019050018EXP × Package name: Closing Package S Delivery Method: eDelivery with Signature Expiration date: 08/13/2019 06:04 PM Sent from: Ellen E Escrow Operation/branch:360 Test Organization Template Mapping Method: Manual mapping after Submit
wizard screens returns you to the Edit and Submit screen. Expedite Close - 2019050018EXP Edit and Submit Delivery Details Package name: Closing Package Revealed Belivery Method: eDelivery with Signature Expiration date: 08/13/2019 06:04 PM Sent from: Ellen E Escrow Operation/branch:360 Test Organization Template Mapping Method: Manual mapping after Submit
 Expedite Close - 2019050018EXP Edit and Submit Delivery Details // Package name: Closing Package is pa
Edit and Submit Local Sphere Expediter Close Delivery Details // // Package name: Closing Package Expiration date: 08/13/2019 06:04 PM Operation/branch:360 Test Organization Delivery Method: Pender Details // Expiration date: Delivery Method: Package number of the second
Edit and Submit Lossphere Expediter Close Delivery Details // // Package name: Closing Package Image I
Delivery Details // Package name: Closing Package image Delivery Method: eDelivery with Signature Expiration date: 08/13/2019 06:04 PM Operation/branch:360 Test Organization Template Mapping Method: Manual mapping after Submit
Package name:Closing PackageDelivery Method:eDelivery with SignatureExpiration date:08/13/2019 06:04 PMSent from:Ellen E EscrowOperation/branch:360 Test OrganizationTemplate Mapping Method:Manual mapping after Submit
Expiration date: 08/13/2019 06:04 PM Sent from: Ellen E Escrow Operation/branch:360 Test Organization Template Mapping Method: Manual mapping after Submit
Operation/branch: 360 Test Organization Template Mapping Method: Manual mapping after Submit
Recipients 🦉 Return Paper Package To: 🦉
Bill Buyerson Chicago Title Insurance Company
Barbara Buyerson 200 Central Blvd, Ste 1000
Sam Seller Chicago, IL 60099
Documents 🖉 Recipients/Assembly 🦉 🔺
Borrower Statement Bill Buyerson , Barbara Buyerson
Disclosure of Lenders and Owners Title Insurance Charges Bill Buyerson , Barbara Buyerson
Escrow Instructions All Recipients
Signing Order 🥖
1 Bill Buyerson , Barbara Buyerson
2 Sam Seller
Back Submit Cancel

The **Edit and Submit** screen also allows you to make changes to the package **Signing Order** and if the <u>Print</u> <u>and Mail</u> option has been selected, the **Return Paper Package** address.

Signing Order

By default, a package to be e-signed will be sent so that each signer will receive notification of the e-sign package at the same time. The **Signing Order** section appears only for the **Delivery with Signature** <u>Delivery Method</u>.

Si	gning Order 🖉		
1		All Recipients	

When the **Signing Order** is 1 for all **Recipients**, each signer can access and complete the e-sign process at any time, independent of whether another signer had completed his or her e-sign package.

The **Signing Order** can be changed by selecting the *in* the **Signing Order** section of the **Edit and Submit**screen. This opens the **Change Signing Order** screen:

🥹 Change Signing Order	—
For recipients to receive their documents: * At the same time: leave all numbers in the Order column at * One at a time: the first recipient to receive documents sho	their default setting of 1. Ild be given a 1, the next
a 2, and so on. Recipient 2 will not receive documents until r	ecipient 1 is done. Order
Bill Buyerson	1 💌
Barbara Buyerson	1 💌
Sam Seller	1 💌
	Save Cancel

If you change the signing order using the **Order** dropdown and select **Save**, the changes appear in the **Signing Order** grid of the **Edit and Submit** screen.

	🥹 Change Signing Order	×
	For recipients to receive their documents: * At the same time: leave all numbers in the Order column at their default setting * One at a time: the first recipient to receive documents should be given a 1, the a 2, and so on. Recipient 2 will not receive documents until recipient 1 is done.	of 1. next
	Name Order Bill Buyerson 1 Barbara Buyerson 1 Sam Seller In Edit and Review screen 2 1 1	•
Signing Or		
1	Bill Buyerson , Barbara Buyerson	
2	Sam Seller	
	Save Cance	el

At least one **Recipient** must have signing order 1, and there must be at least one number entered for each number from the highest number down to 1. If a signing order number is missing, when you click Save

, you will see a message telling you the missing signing order number.

	Change Signing Order			8
	For recipients to receive the * At the same time: leave * One at a time: the first r a 2, and so on. Recipient Name Bill Buyerson	eir documents: all numbers in the Order co ecipient to receive documen 2 will not receive documen Incorrect Signing Or	lumn at their default settin nts should be given a 1, th ts until recipient 1 is done. Orde	ng of 1. ne next
	Sam Seller Oscar Officeman		4	•
SofPro 360		x		
There must be at leas highest number dow order(s) 3.	t one number entered for ea n to 1 <mark>. No recipients are assig</mark>	ch number from the gned for signing	Save Can	icel
		ОК		

For recipients to receive the * At the same time: leave a * One at a time: the first re a 2, and so on. Recipient 2	ir documents: all numbers in the Order column ecipient to receive documents sh 2 will not receive documents unti	at their default setting of 1. ould be given a 1, the next I recipient 1 is done.
Name Dill Discomen		Order
Barbara Buyerson Sam Seller	Correct Signing Order	
Oscar Officeman		3 -
		Save Cancel

Return Paper Package To

For packages with the <u>Print and Mail</u> option checked, the **Settlement Agent** contact name and address will be displayed by default in the **Return Paper Package To** section of the **Edit and Submit** screen.

To change this, select the *local* icon to open the **Change Return Address for Paper Documents** screen and select the **Return to:** dropdown.

😔 Change Return	Address for Paper Documents
If documents Recipients w	are signed on paper, please provide the address to return them by mail. ill also have the option to upload a scanned copy or fax them.
Return to:	Settlement Agent Make preferred
	Default
	Settlement Agent
	Title Company : Agency Escrow Company
	Street address: 456 Main St
	City/State/Zip: Raleigh, NC 27609
	Save Cancel

You can chose from the **Settlement Agent**, **Title Company** and **Escrow Company** contacts in the linked order¹. Selecting the **Make preferred** checkbox will cause the selected contact to be the default contact for the next package created in the linked order.

If the selected contact is missing a Name, Street address or City/State/Zip, an * will appear and the

Save button will be disabled.

¹ The "Default" option will display the name and address as configured in **Expedite™** for the selected **Operation/branch**, but this feature is not currently available.

🥹 Change Returr	n Address for Paper Documents
lf documents Recipients w	s are signed on paper, please provide the address to return them by mail. ill also have the option to upload a scanned copy or fax them.
Return to:	Title Company Make preferred
	Name: Trusty Title Comkpany Street address: 🗶 City/State/Zip: 👷
	Save Cancel

When the package setup has been completed, selecting the **Next** button opens the **Submit** screen.

🔤 Expedite Close - 2019050018EXP		×
Edit and Submit	Loans	Sphere [.] Expedite Close
Delivery Details 🖉		
Package name: Closing Package 📈 Expiration date: 08/13/2019 06:04 PM Operation/branch:360 Test Organization	Delivery Method: eDe Sent from: Ellen E Esc Template Mapping Met	livery with Signature row thod:Manual mapping after Submit
RecipientsBill BuyersonBarbara BuyersonSam Seller	 Return Paper Package Chicago Title Insur 1200 Central Blvd, Chicago, IL 60099 	ge To: 🖉 rance Company Ste 1000
Documents 🖉		Recipients/Assembly 🦉 \land
Borrower Statement		Bill Buyerson , Barbara Buyerson
Disclosure of Lenders and Owners Title Insu	rance Charges	Bill Buyerson , Barbara Buyerson
Escrow Instructions		All Recipients 🗸
Signing Order 🥖		
1 Bill Buyerson , Barbara	Buyerson	
2 Sam Seller		
	[Back Submit Cancel

Submit

Selecting the **Submit** button sends the package to **Expedite™**.

Expedite Close - 20	19050018EXP			×
Edit and Submit		Loa	nSphere Expe	edite= Close
Delivery Details 🏑	9			
Package name: Expiration date: Operation/t SoftP	Closing Package 🔀 08/13/2019 06:04 PM ro 360	Delivery Method: Sent from: Ellen I	eDelivery with Signature E Escrow	ubmit
Recipients Bill Buyers Barbara Bu Sam Seller	 Please wait while 	e your package is being se	nt to Expedite.	bly 🥔 🔿
Borrower Stateme	ent		Buyerson	n , D arbara
Disclosure of Len	nders and Owners Title Ins	urance Charges	Bill Buyerson Buyerson	n , Barbara
Escrow Instruction	ns		All Recipient	s 🗸
Signing Order				
1	Bill Buyerson , Barbara	Buyerson		
2	Sam Seller			
			Back Subr	mit Cancel

Your default browser will open and **Expedite™** will open in Package Manager with the documents ready for templating².

² Please refer to **Expedite™** for training and assistance with template application.

2	🕞 🗇 💋 https://expedite1.	.com/packagemanag	per/11109/2624/2		o = ⇒ Q	6 UiPackagemanager ×				3 (8)
	Transactions	Templates	Admin 🗸		Packages	- Search	٩		Help	1
Þ	New Package fo	r 2018101001	31EXP							
	Oelivery									^
l	Recipients									l
l										
l	3 Documents									l
l	Add do	ocuments						Recognize Docs		l
		1 Porrowor Statemont		2 isclosura of Landa	3 Eccrow Instructions	4				
										ļ
	Prir	t & Sign E-Not	ary Print 8	k Sign E-Notary	Print & Sign E-Notary	Print & Sign E-Notary				
		Recipients		Recipients	Recipients	Recipients				
		Bill Buyerson Barbara Buyers	on Z f	Bill Buyerson Barbara Buyerson	 Bill Buyerson Barbara Buyerson 	Bill Buyerson				~

After Submission

After a package has been submitted to **Expedite**[™], the <u>Package Management</u> screen opens displaying the details of the package. If you have been redirected to the **Expedite**[™] website to complete the signature templating, the **Package Management** screen will remain open in 360.

🥹 Expedite Close - 201810100131	EXP				- ×
Package Management		L	oanSpher	e [,] Expedite	- Close
Package Name	Created On	360 Status	Package Status	Exp. Date	View
Closing Package	10/12/2018 3:29	In Progress		10/17/2018 3:57	Ľ
		_			_
Add Recall / Delet	е				D)
				(Close

360 Queue

The **360 Queue** displays the transaction details. The **Description** field displays the <u>Package Name</u> and the <u>Package Expiration</u> date and time.

Queue	Lueue										
O Next:	Step 🥥 🖂 🗐	Views: Acti	ve Order	* 🚖	📝 🐻 🛗 Filte	r: All Providers	- 2 11	Ø			
	Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On	Completed On	Category	Description	Transaction Number
\$	Expedite Close	eSign	In Progress	201810100131EXP	Default	Lizanne Jenkins	10/12/2018 3:29 PM		Settlement Services	Closing Package; 10/17/2018 3:57 PM	410060-70-181012-125392
	Package Name Expiration date and time										
1 of 1 res	1 of 1 results at 150 PM										
🐞 Errors	and Warnings 🥠	Search Resul	lts 🚳 Queue	2							

Transaction Status

The status field will display one of the following statuses:

- In Progress: A package has been submitted and is waiting to be viewed or signed by all Recipients.
- **Ready**: An e**Delivery with Signature** or **eDelivery with Closing** package has been signed and returned.
- Completed:
 - For **eDelivery with Signature** and **eDelivery with Closing**, the returned package has been reviewed and accepted into the linked order
 - For **eDelivery with Consent**, all recipients have consented and viewed all the documents in the package
 - For **eDelivery only**, all recipients have viewed all the documents in the package
- Rejected:
 - For eDelivery with Signature, eDelivery with Closing and eDelivery with Consent, one of the Recipients has opted out of viewing the package in Expedite[™] causing the package to be rejected for all Recipients
 - For **eDelivery with Signature** or **eDelivery with Closing** one of the Recipients has consented to view the package but has declined to esign a document
 - For any **Delivery Method**, a package fails to post successfully in **Expedite™**
 - The **Recipient** who has opted out of the e-sign process or declined to e-sign a document will is displayed in the <u>Transaction Log.</u>
- **Canceled**: The transaction has been <u>Deleted</u> or <u>Recalled</u> by a 360 user.
- **Processing**: An error has occurred. You will need to contact SoftPro support for assistance.

Toolbar features

- You can access the <u>Package Management</u> screen by double clicking on an **In Progress** transaction or selecting <u>Next Step</u>.
- You can cancel a transaction from the **360 Queue** by selecting the transaction and the button.

Tracking a Package

In addition to providing the transaction status for a package, 360 also provides the delivery status as reported from **Expedite**[™]. You can track the progress of a transaction by viewing the current status in the **Package Management** screen or by viewing the history of the package's progress in its **Transaction Log**.

Package Management Screen

Double-clicking on an In Progress transaction in the **360 Queue** or clicking **Next Step** opens the **Package Management** screen to display the **360 Status** and the **Package Status**.

		Description		Expedite Close - 2018101001	I31EXP				— ×-
	•	Deposit		Package Management		L	oanSpher	e [.] Expedite [.]	Close
	Se	ttlement date/time:							
	Du	e date/time:		Package Name	Created On	360 Status	Package Status	Exp. Date	View
			1	Closing Package	10/12/2018 3:29	In Progress	Delivered	10/17/2018 3:57	e de la companya de l
	Pro	operty address:						·	
xep \ominus 🖂 📄 Views: Act	ive Order	_	360	Transaction Status			۲ ۲	Package Delivery Status	/
Provider Service	Status	inked Order							
Expedite Close eSign	In Progress	01810100131EXP							

Expedite[™] updates the **Package Status** as **Recipients** access, view, sign and complete a package. The following delivery statuses may be displayed for a package:

• **Pending**: An **eDelivery with Signature** package has been submitted to **Expedite**[™], but the package hasn't been sent to the **Recipients** for signing. This may be because a 360 user hasn't completed the signature templating or that the signature templating has been completed, but the 360 user hasn't clicked **Send Package** in **Expedite**[™].

1.0.1
end Package

- Delivered:
 - eDelivery with Signature: The templates have been added and the package has been posted in Expedite[™] for delivery. If the Signing Order is 1 for all recipients, an email has been sent to all recipients with a link to start the signing process. If the Signing Order is not 1 for all recipients, then only the first Recipients(s) have received an email with the link to start the signing process. The remaining Recipient(s) will receive an email when the prior Recipient has completed the signing process.

Note: If you completed the templating in Expedite[™] and sent the package for delivery, it may take a few minutes for the status message in the Package Management screen to change to Delivered due to a delay in Expedite[™] sending the updated status message to 360.

- **eDelivery with Consent** and **eDelivery only**: All **Recipients** have received an email with a link to view the documents.
- Viewed First:
 - A **Recipient** has viewed a document in the package.
- All Viewed:
 - All **Recipients** have viewed all the documents in the package.
- Signing
 - **eDelivery with Signature:** At least one, but not all, of the recipients has signed the package.
 - eDelivery with Consent and eDelivery only: Doesn't apply.
- Signed
 - **eDelivery with Signature:** All **Recipients** have signed the package.
 - eDelivery with Consent and eDelivery only: Doesn't apply.
- Completed
 - eDelivery only:
- Expired
 - **eDelivery with Signature**: At least one of the **Recipients** failed to complete the e-sign process before the package expiration date and time.
 - **eDelivery with Consent:** At least one of the **Recipients** has failed to view all the documents before the package expiration date and time expired.
 - **eDelivery only:** Doesn't apply.
- Declined
 - eDelivery with Signature and Delivery with Consent:
 - **eDelivery only:** Doesn't apply

Transaction Log

As 360 receives package status updates, they are also sent to the package's **Transaction Log**. Opening the **Transaction Log** will show a history of the package as it moves to completion.



The **Transaction Log** will display the Recipient's name when that **Recipient Views** or **Signs** the package, or when the package is **Declined.**

Viewing a Pending Package

If you have sent a package to **Expedite**[™] but have closed out of the website without completing the signature templating, you can access the package again by clicking the ^I icon.

Expedite Close - 201810100131EXP X LoanSphere' Expedite" Close Package Management Package Name Package Status View Created On 360 Status Exp. Date Post Closing Docs In Progress 2 10/16/2018 5:13 ... Pending All Viewed Disclosures 10/16/2018 4:39 ... Completed <u>ک</u> Additional Closing Docs 10/15/2018 4:34 ... Rejected Declined ۲D 10/20/2018 5:33 ... Update to Closing Package 10/15/2018 3:27 ... In Progress Signing 10/20/2018 4:27 ... Ż **Closing Package** Ż 10/12/2018 3:29 ... Rejected Declined 10/17/2018 3:57 ...

Selecting the ^[™] icon for a **Pending** package will open your default browser to the **Expedite**[™] website page where you can continue adding signature templates to the documents.³

³ Viewing a package in **Expedite™**, after it has been posted for delivery, will be available in a future release.

Canceling a Package

There are two ways to cancel a package in **Expedite™**. You can delete a pending package, or you can recall

Recall / Delete a package that has been posted for delivery to the Recipients. 360 handles this with the button in the **Package Management** Screen and the 🥯 icon in the **360 Queue** toolbar.

				Expedite Close - 20	1810100131EX	p				×
				Package Manager	nent			LoanSphe	re Expediti	e⁼ Close
				Package Name		Created On	360 Status	Package Statu	s Exp. Date	View
				Post Closing Doc	s	10/16/2018 5:13	In Progress	Pending	10/21/2018 6:13	🕜
				Disclosures		10/16/2018 4:39	Completed	All Viewed		d 译
				Additional Closing	Docs	10/15/2018 4:34	Rejected	Declined	10/20/2018 5:33	🕜
				Update to Closing	Package	10/15/2018 3:27	In Progress	Signing	10/20/2018 4:27 .	🖻
				Closing Package		10/12/2018 3:29	Rejected	Declined	10/17/2018 3:57 .	
Cá fr	anceling a Pa rom the 360 (ackage Queue]	Package Pack Manage Scre	from the age ement en					ÿ
}ueue ⊘NextS	Step 💿 🖂 🗊	Views: Act	tive Order							Close
	Provider	Service	Status	Linked Order	Linked Profile	Created By	Create	d On Co	mpleted On	Category
\$	Expedite Close	eSign	In Progress	201810100131EXP	Default	Lizanne Jenkins	10/16/2	018 5:13 PM		Settlement Servic
÷	Expedite Close	eSign	Completed	201810100131EXP	Default	Lizanne Jenkins	10/16/2	018 4:39 PM 10/	16/2018 4:46 PM	Settlement Servic

Recall / Delete will be disabled a selected package if the 360 Status or Package Status makes it The ineligible or if the <u>Operation/branch</u> configuration in **Expedite**[™] does not permit packages to be recalled.

Deleting a Pending Package

When you select a Pending Package and the sicon or the Recall / Delete button, 360 will display a confirming message:

Correction Recall / Delete	IcanSphere Expedite Close
SoftPro 360	Softpro 360-Delete Package Are you sure you want to delete this package? Yes No
	Back Next Cancel

Selecting	Yes	will delete th	e package in Ex	pedite™ and 36	60 will display th	iis message:
		Soft	Pro 360	•••		
		(1 Your package ha	is been deleted.		
				ОК		
		1				

Selecting will close the Recall/Delete screen. Deleting a pending package deletes the package completely from Transaction Workspace in **Expedite**[™].

Recalling a Delivered Package

Recalling a package in 360 operates the same way as deleting a package in 360. A package only be recalled if it has a 360 Status of **In Progress.** It cannot be recalled if it has been a 360 transaction status of **Rejected**, **Canceled** or **Completed**.

A package can be recalled if it is has a 360 transaction status of **In Progress** or a **Package Status** as follows:

	eDelivery with Signature eDelivery with Closing	eDelivery with Consent	eDelivery only
Delivered	~	~	~
First View	~	~	~
View All	~	×	×
Declined	~	×	N/A
Signed	×	N/A	N/A

As when deleting a pending package, when you recall a delivered package, 360 displays a confirming message:





In the **Expedite**[™] website, a recalled package will still be viewable in **Transaction Workspace** but will have a **Recalled** status.

Importing a Signed Package

When a **Delivery with Signature** package has been e-signed by all **Recipients**, **Expedite**[™] sends the documents to 360, and the transaction status in the 360 Queue changes to **Ready**.

O Next 9	Step 🔘 🖂 🗐	Views: A	ctive Order	- 🎓	📝 🐻 🛗 Filte
	Provider	Service	Status	Linked Order	Linked Profile
\$	Expedite Close	eSign	Ready	201810150132EXP	Default

Double-clicking on the transaction or selecting the transaction and will open the **Review** screen.

🥹 Review - 201810150132EXP 📧					
R	Review LoanSphere Expedite Close				
🗈 Do	ocument	ts			
V	View	Сору	File Name	File Size (KB)	Transferred
V	J.		Disclosure of Lenders and Owners Title Insurance Cha	67514	100%
V	<u> </u>		Escrow Instructions.pdf	195544	100%
V	, K		eSign Docs.pdf	619247	100%
				Accept	Close

- All documents are returned in .pdf format and will be checked by default.
- Selecting 🔑 will open the document in your default .pdf reader app.

- Selecting 🗐 adds an image of the document to your clipboard.
- Selecting Accept adds the documents to the linked order's Attachments or, for SmartView users, to the linked SmartView order.

After the documents have been accepted into the linked order, the **360 Queue** displays the transaction status as **Completed** and the transaction can no longer be accessed from the **360 Queue**. However, the **Transaction Log** can still be opened to view the transaction history.



Automation

Workflow Automation is available in Select version 4.3.2 (4.2.41028.5) or higher. Automation for Expedite[™] Close transactions can be enabled to handle e-signed packages returned to 360. Only users with SPAdmin access can create an automation process. Automation processes are created in SPAdmin by clicking on the Processes subfolder under Automation and clicking on New Process Setup in the Processes ribbon, or right clicking on the Processes subfolder and clicking on New Processes.⁴

E	1		*							Processes	
	2	Pro	Form	ProTrust	ProDesign	Pro 1099	SPImage	SPAdmin	360	Processe	s
Ne	w Pro	p Sta	rt Page	Order 2	2017110086	Manage	ment Console	• X			
Nice	-	9	29	? 8== ▼ Filte	er by:			9			
W.		Ser	rer (http	o://spro-l30007	9:8080/)	Proce	sses				
	1		General Settings			Name					Cate
			Archives Torop-down Lists Office Hours Trust Accounting ProForm Custom Fields Documents and Reports Codup Tables Ny Screens Coder Numbering Policy Recording Fees and Transfer Taxes Workflow ProTrust Automation Processes Montoring Documents Policy Monitoring Processes Monitoring Processes Process		s					360	

⁴ A full explanation of the **Automation** process is beyond the scope of this User Guide. For more information, access the **Processes** subfolder in the **Management Console** of **SPAdmin**, and click the **F1** key to open the online **F1 Help** guide for **Select Automation**.

To automate the acceptance of an e-signed package, set up the Process as follows:

- 1. When:
 - a. A 360 transaction is updated
 - b. And the service is **Expedite[™] eSign**

Automation Process Wizard	[23
Start this process when: Order is saved Occument is attached Specific day and time occurs Task is added or updated 360 transaction is updated Here's your rule so far: When a specific 360 transaction is updated	If Then When Select the Service Expedite Close - eSign OK Cancel	
	Next > Cancel	

- 2. If:
- a. The 360 transaction status is updated
- b. And the updated status is **Ready**

Automation Process Wizard	E True
And if these conditions are met: 360 transaction field is specific value 360 transaction provider reference name contains specifi 360 transaction provider reference number contains specific 360 transaction sent to contains specific value 360 transaction status is specific value 360 transaction status is specific value Order has the following criteria Here's your rule so tr: When a Expedite Close eSign 360 transaction is updated and 360 transaction status is <u>specific value</u>	If 360 transaction status is New Ready Completed Rejected Canceled Error InProgress Updated Accepted Suspended Sending OK Cancel
	Next > Cancel

- 3. Then:
 - a. Perform a specific 360 action
 - b. Where the Service Action is to Save Documents
 - c. And the Service Action Setting is Accept Documents

Automation Process Wizard	
G	
When If Then do the following: If Perform specific actions on the order Perform a specific 360 action Run code snippet Image: Code snippet	Image: Perform a 360 Action Perform a 360 Action Image: Perform a 360
Here's your rule so lar: When a <u>Expedite Cose - eSign</u> 360 transaction is updated and 360 transaction status is <u>Ready'</u> then do the folloving: 2 perform a <u>specific</u> 360 action	Perform a 360 Action Image: Constraint of the service of the serv
	Accept Documents [Accept Documents] - This will accept documents into the order. [No Action] - No documents will be imported into the order. OK Cancel

Selecting Finish closes the Automation Process Wizard and opens a screen to configure the Process. Select the 360 category (optional), enter a Name (required), check the **Enable the Process** checkbox and click **OK.**

New Automation Process					
General					
Category:	360				
Name:	Expedite Close: Accept				
Description:	Accepts e-Signed documents when status is Ready				
Last Modified On:	(none)				
Last Modified By:	(none)				
Rule:	Edit				
Rule: Edit When a Expedite Close - eSign 360 transaction is updated and 360 transaction status is 'Ready' then do the following: perform a Expedite Close - eSign 360 action					
Enable this pro	DCESS				
	OK Cancel Apply				

Known Issues

Delivery Status Updates Delayed

There may be a delay of three to eight minutes between the time that a package status changes in **ExpediteTM** and the package status message is sent to 360. For example, you may receive an email notification (depending on your organizations settings) that all the **Recipients** have e-signed a package, but the delivery status in 360 is still Viewed. After waiting a few minutes, you can refresh the transaction status using the \leq icon in the 360 Queue toolbar or in the lower right corner of the **Package Summary** screen.

Package status messages out of order in Transaction Log

Expedite[™] queues up status updates and sends them to 360 about every 4 to 6 minutes. Because multiple updates can be sent at the same time and not in the same order as created, the package status events may be out of order in the Transaction Log.

Bounced email not handled in Expedite™

Expedite[™] does not notify package senders if an email notification to a Recipient bounces back to **Expedite**[™]. If a Recipient hasn't received the email notification for a package, check the email address in the Order to confirm that it is correct.

Only one Pending package allowed for an order

Although an order can have multiple Pending (referred to as "Draft" in **Expedite™**) packages in **Expedite's™** Transaction Workspace for that order, **Expedite's™** application programming interface (API) appends the second package to the first package when sent from 360, rather than creating a separate pending package. To keep this from happening, 360 blocks users from adding a second package if another package is <u>Pending</u>.

Workaround: Either (1) select the \square icon to <u>view</u> and complete the package in **Expedite**TM, (2) <u>Delete</u> the Pending package, or (3) create and send the second package directly from the **Expedite**TM website. If you choose option (3) for a **eDelivery with Signature** or **eDelivery with Closing** package, it will not be returned to your order in 360. You will need to manually download the signed package and attach it to the ProForm order.

Duplicate Order Numbers

In the **Expedite**[™] web site, **Expedite**[™] opens a **Transaction Workspace** using the ProForm order number as the identifier. If an operation within an organization uses the same order number as another operation, all packages will be added to the same **Transaction Workspace**.

Workaround: Change the ProForm order number for one of the orders.

Documents not saving to Attachments in Classic (460610)

In the Review screen if a document name is longer than 50 characters, Accept will complete, and the document will not be added to Attachments.

Workaround: In the review screen, shorten the document name to less than 50 characters.

Appendix

Email to Recipient: New Package



Softpro <techsupport@elynx.com>

Softpro Document Delivery Service - Electronic documents available for transaction 201810150132EXP, Package ID 410060-7(

To Bill Buyerson

Dear Bill Buyerson,

This email has been sent by the Softpro document delivery service to let you know that documents for transaction 201810150132EXP, Package ID 410060-70-181018-135903 have been delivered and are available electronically.

In order to complete the registration/login process to retrieve your documents electronically, you may receive a one-time code via your mobile phone or landline when you click on the link. By clicking on the link, you consent to receive autodialed or prerecorded calls or texts to a mobile phone or landline, for purposes of receiving one-time codes to access your account.

Please click here to access your account.

If the link above does not work, please copy and paste or type the address below in your browser's address bar: https://expedite1.uat.bkfstest.com/signing/2643

Sincerely,

Lizanne Jenkins

Softpro

6094719034

lizanne.jenkins@softprocorp.com

For technical assistance, please visit the Technical Support website at http://www.elynx.com/support/knowledge_base.

This is an auto-generated message; please do not reply to this message. The Softpro document delivery service is powered by Black Knight.

Email to Recipient: Package Expiration Warning

Softpro <techsupport@elynx.com> Softpro Document Delivery Service - Timefrme for electronic signature is nearing expiration for transaction 201810100131EX To Bill Buyerson Dear Bill Buyerson, This email has been sent by Softpro to let you know that the timeline to electronically sign documents is nearing expiration for transaction 201810100131EXP, Package ID 410060-70-181015-135569. One or more recipients for transaction 201810100131EXP have not completed the electronic signature process. The option for recipients to sign electronically will expire in 24 hours after which the documents will no longer be available for electronic signature. Please click here to access your account. If the link above does not work, please copy and paste or type the address below in your browser's address bar: https://expedite1.uat.bkfstest.com/signing/2579 Sincerely, Ellen Escrow

Softpro

ellen.escrow@outlook.com

For technical assistance, please visit the Technical Support website at http://www.elynx.com/support/knowledge_base.

This is an auto-generated message; please do not reply to this message. The Softpro document delivery service is powered by Black Knight.

Release Notes

Date	Version	Details
10/10/2018	1.0.60906.2	Release 1; supports Expedite™ Close ver. 18.3
2/13/2019		Release 2; supports Expedite™ Close ver. 19.1a
5/15/2019		Release 3; added back URL re-direct feature
6/12/2019	1.0.10208.7	Release 4; removed ADR feature