

# Gridbase User Guide

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## *Introduction*


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The SoftPro 360 integration with Gridbase provides the ability to receive Title and Escrow order requests from, and send information and documents back to, Gridbase customers. In addition to accepting order requests, a new order can be created with data seamlessly flowing into ProForm increasing productivity, efficiency and removing data re-entry.

The vendor does not exist in the list of services menu and can only be accessed in the 360 queue once an order is received.

## Accessing New Orders in the SoftPro 360 Queue

New orders sent from Gridbase appear in the SoftPro 360 queue under the **New Transactions View** as a single transaction. The **Provider** column displays **Gridbase**, the **Status** column displays as **New** with the **Description** column showing the Borrower's Name and Property Address.

To review a new transaction, highlight the transaction, and click the  **Next Step** button at the top left of the **Queue** toolbar.

Queue

Next Step

Views: New Transactions

Filter: GridBase

Provider	Service	Status	Created By	Created On	Provider Reference Number	Sent To	Category	Description	Provider	Event	Contact	Product	Transaction Number
GridBase	Exchange	New		4/19/2023 4:38 AM	63e17720246af76b599e252e	Name1 - CompanyName1	Order Origination	Dennis Mackesha-2 Cheryl Lane Ransom Town...	Some lender...	Submit	Jay Minkay	GridBase	410060-40-230419-268979
GridBase	Exchange	New		4/19/2023 4:40 AM	63e17720246af76b599e252e	Name1 - CompanyName1	Order Origination	Dennis Mackesha-2 Cheryl Lane Ransom Town...	Some lender...	Submit	Jay Minkay	GridBase	410060-40-230419-268979
GridBase	Exchange	New		4/19/2023 4:53 AM	63e17720246af76b599e252e	Name1 - CompanyName1	Order Origination	Dennis Mackesha-2 Cheryl Lane Ransom Town...	Some lender...	Submit	Jay Minkay	GridBase	410060-40-230419-268980
GridBase	Exchange	New	gridbaseservice	4/19/2023 8:23 PM	644080dbef8b99a1926df	Sean Smith - ABC Title and Settle...	Order Origination	2909 Minnesota Avenue Lynn Haven FL 32444	Wells Fargo	Submit	Wells Fargo	GridBase	410060-40-230420-269042
GridBase	Exchange	New	gridbaseservice	4/20/2023 12:08 PM	6446382320f96a58cd8268	Sean Smith - ABC Title and Settle...	Order Origination	2909 Minnesota Avenue Lynn Haven FL 32444	Wells Fargo	Submit	Wells Fargo	GridBase	410060-40-230420-26910
GridBase	Exchange	New	gridbaseservice	4/20/2023 3:42 PM	64419561ab516030ceaeaf	Sean Smith - ABC Title and Settle...	Order Origination	2909 Minnesota Avenue Lynn Haven FL 32444	Wells Fargo	Submit	Wells Fargo	GridBase	410060-40-230420-269111

18 of 18 results at 5:50 AM [Filter displaying 18 rows]

Errors and Warnings

The **Review** screen opens to display all the data, notes, and documents sent from Gridbase to SoftPro 360.

The data should be reviewed carefully before acceptance.

Review- 2023050040

Select All Select None **Field Codes** New Order Order Search Linked To: 2023050040

Groups Data

	<input checked="" type="checkbox"/>	Name	Current Value	Field Code	New Value
<input checked="" type="checkbox"/> All					
<input checked="" type="checkbox"/> Properties	<input checked="" type="checkbox"/>	Property[1]/Address1		Properties[1].Address...	2 Cheryl Lane
<input checked="" type="checkbox"/> Loans	<input checked="" type="checkbox"/>	Property[1]/City		Properties[1].Address...	Ransom Township
<input checked="" type="checkbox"/> Order	<input checked="" type="checkbox"/>	Property[1]/State		Properties[1].Address...	PA
<input checked="" type="checkbox"/> Buyers	<input checked="" type="checkbox"/>	Property[1]/Zip		Properties[1].Address...	18411
<input checked="" type="checkbox"/> Lenders	<input checked="" type="checkbox"/>	Property[1]/Block		Properties[1].Block	3
<input checked="" type="checkbox"/> ListingAgentBrok	<input checked="" type="checkbox"/>	Property[1]/County		Properties[1].County	Lackawanna
<input checked="" type="checkbox"/> SellingAgentBrok					

Documents

<input checked="" type="checkbox"/>	View	Copy	File Name	File Size (KB)	Transferred
<input checked="" type="checkbox"/>			Appraisal Report	11	100%
<input checked="" type="checkbox"/>			Invoice\dghghfghfghfghd	64	100%
<input checked="" type="checkbox"/>			Invoice	127	100%
<input checked="" type="checkbox"/>			Invoice-Copy(1)	127	100%
<input checked="" type="checkbox"/>			Invoice-Copy(2)	127	100%

Accept Reject Cancel

All data with a checkmark in the check box in front of the data field name will be accepted into a ProForm order (by default all check boxes are checked).

The check box in front of the **Name** column header, if checked, checks all fields in the listing; if unchecked, all fields are unchecked. The **Select All** and **Select None** buttons in the toolbar, have the same affect.

Review- 2023050040

Select All Select None Field Codes New Order Order Search Linked To: 2023050040

Groups Data

	Name	Current Value	Field Code	New Value
<input checked="" type="checkbox"/>	Property[1]/Address 1	Properties[1].Address...	2 Cheryl Lane	
<input checked="" type="checkbox"/>	Property[1]/City	Properties[1].Address...	Ransom Township	
<input checked="" type="checkbox"/>	Property[1]/State	Properties[1].Address...	PA	
<input checked="" type="checkbox"/>	Property[1]/Zip	Properties[1].Address...	18411	
<input checked="" type="checkbox"/>	Property[1]/Block	Properties[1].Block	3	
<input checked="" type="checkbox"/>	Property[1]/County	Properties[1].County	Lackawanna	

The incoming data sent from Gridbase is displayed in the **New Value** column. The **Current Value** column displays data that is currently in the order – if the transaction has already been linked to an order.

Review: 2023050040

Select All Select None **Field Codes** New Order Order Search Linked To: 2023050040

Groups Data

	Name	Current Value	Field Code	New Value
<input checked="" type="checkbox"/>	Property[1]/Address1		Properties[1].Address...	2 Cheryl Lane
<input checked="" type="checkbox"/>	Property[1]/City		Properties[1].Address...	Ransom Township
<input checked="" type="checkbox"/>	Property[1]/State		Properties[1].Address...	PA
<input checked="" type="checkbox"/>	Property[1]/Zip		Properties[1].Address...	13411
<input checked="" type="checkbox"/>	Property[1]/Block		Properties[1].Block	3
<input checked="" type="checkbox"/>	Property[1]/County		Properties[1].County	Lackawanna

The incoming values are also broken down into groups. The **Groups** are listed in a tree-view on the left side of the screen. A specific Group, such as **Buyers**, can be expanded (by clicking on it) so that only the new incoming values for that group are viewed. The default **Group** selection is **All**, which displays all of the data being presented for the order.


166 Review-


Select All Select

Groups

- All
  - Properties
  - Loans
  - Order
  - Buyers
  - EscrowCompanies
  - Lenders
  - ListingAgentBrokers
  - MortgageBrokers

If the new order has a document attached to it, the document appears in the **Document** section of the screen.

To view a document, click the **PDF**  icon in the **View** column.

To copy a document to the clipboard, click the **Copy**  icon in the **Copy** column. The document(s) is pushed to the **Attachments/Document History** for Select.

Documents

<input checked="" type="checkbox"/>	View	Copy	File Name	File Size (KB)	Transferred
<input checked="" type="checkbox"/>			Appraisal Report	11	100%
<input checked="" type="checkbox"/>			Invoiceehjdghfhdhfdhjd	64	100%
<input checked="" type="checkbox"/>			Invoice	127	100%
<input checked="" type="checkbox"/>			Invoice-Copy(1)	127	100%
<input checked="" type="checkbox"/>			Invoice-Copy(2)	127	100%

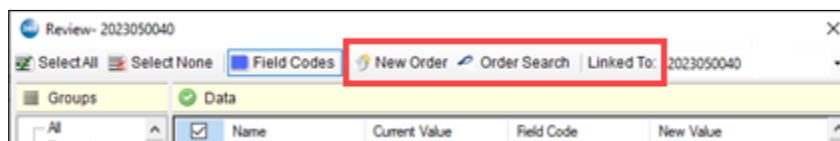
Accept Reject Cancel

## Linking the Transaction to a ProForm Order


There are three options to associate the data to a ProForm order: Create a new order, Search for an order, or Link to an order that is currently opened in ProForm.

- Click the **New Order** button to open the **ProForm New Order** screen. Once the new order information (Prefix, Suffix, Order Number, Trust account and template) has been entered click **OK**; this populates the new order number in the **Linked To** field on the **Review** screen.
- Click the **Order Search** button to open the **ProForm Order Search** screen. Highlight and double click the desired order number. The chosen order number populates in the **Linked To** field on the **Review** screen.

- If the ProForm order that the data should be entered into is already open, click the **Linked To** drop-down and select the ProForm order number.



Once the ProForm order number is selected and displayed in the **Linked To** field, the user will see any existing data populated in the **Current Value** column. **Current Value** and **New Value** data should be reviewed prior to accepting the order.

Should a change need to be made to a **New Value**, before acceptance, click the **Edit**  icon to the right of each data line to open up the **Edit New Value** screen.

Review- 2023050040

Select All Select None Field Codes New Order Order Search Linked To: 2023050040


Groups Data


Name	Current Value	Field Code	New Value
Property[1]/Address1		Properties[1].Address...	2 Cheryl Lane
Property[1]/City		Properties[1].Address...	Ransom Township
Property[1]/State		Properties[1].Address...	PA
Property[1]/Zip		Properties[1].Address...	19411
Property[1]/Block		Properties[1].Block	3
Property[1]/County		Properties[1].County	Lackawanna

Documents

View	Copy	File Name	File Size (KB)	Transferred
		Appraisal Report	11	100%
		Invoicehjdhfhdfhdfhj	64	100%
		Invoice	127	100%
		Invoice-Copy(1)	127	100%
		Invoice-Copy(2)	127	100%

Accept Reject Cancel

After reviewing the data, and editing as needed, the user can click the  **Accept** button to pull the **New Value** data and **Documents** into the linked order. Once accepted, the transaction status in SoftPro 360 will update to **In Progress**.

The order can be rejected by clicking the  **Reject** button. After clicking the **Reject** button, you are prompted to confirm and enter a reason for the rejection in the **Reject Reason Note** field. A rejection reason is required as indicated by the red asterisk.

**NOTE:** Rejected transactions are displayed in the SoftPro 360 queue with **Status** of **Rejected** with no further action being available to the transaction. Gridbase and the lender are notified the order was rejected.

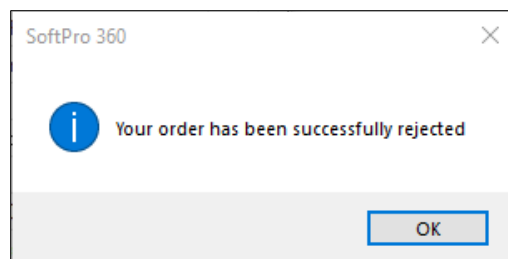
SoftPro 360 - Reject Order

Are you sure you want to Reject?


Reject Reason Note \*

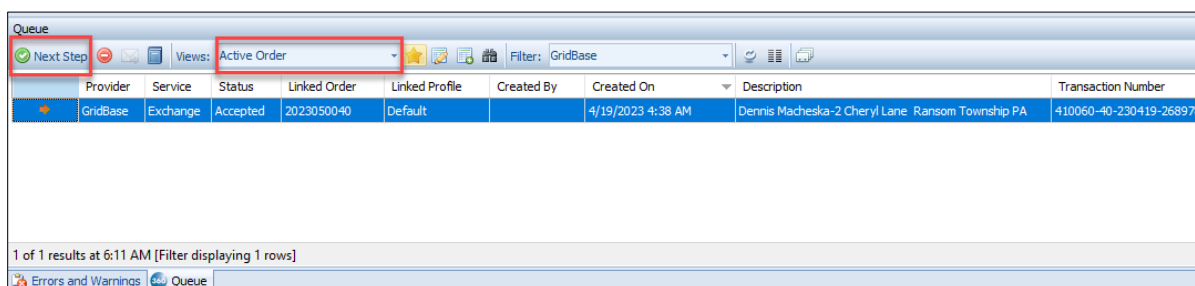
Yes No

Once the transaction has been sent to Gridbase as a rejected order, a message displays that ***Your order has been successfully rejected***.

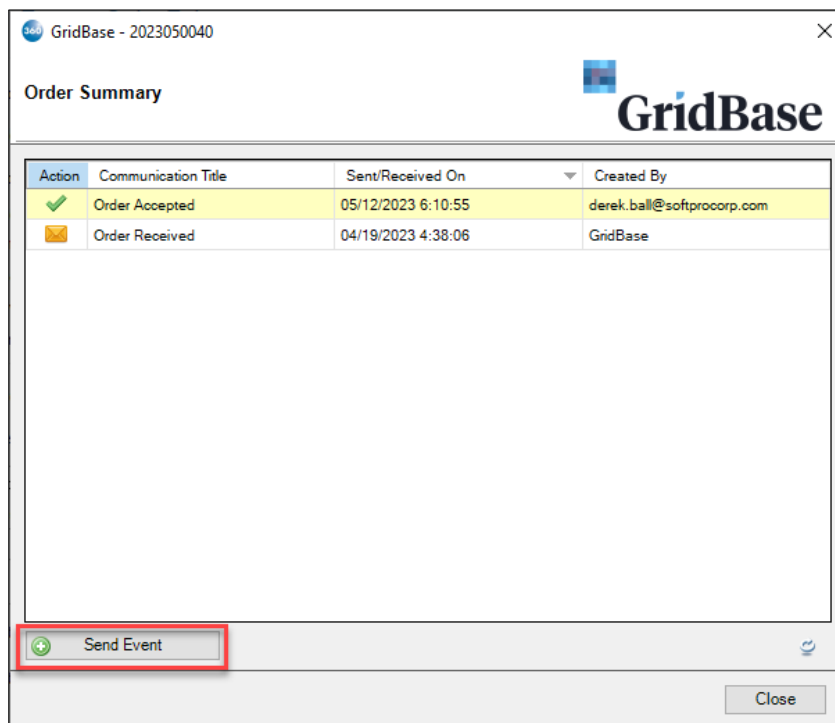


## Updating a Gridbase Transaction

To access the **Accepted** transaction to send a communication, change the SoftPro queue **View** to **Active Order** (if the order is open on your desktop). To update the transaction, highlight it and click the  **Next Step** button to open the **Order Summary** screen.



The **Order Summary** screen shows all the events that have occurred for the transaction. In this example, the receipt of the order is the sole event presented.



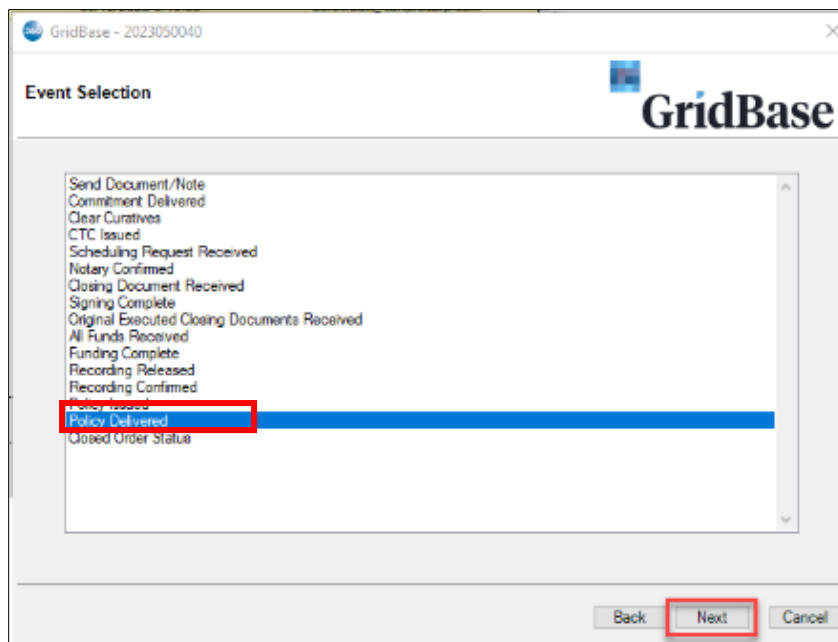
Click the **Send Event** button to open the **Event Selection** screen to view the available events.



The **Event Selection** screen allows for event notifications and documents/notes to be sent to Gridbase. Multiple events of the same type may be sent to Gridbase, with the exception of the **Title Complete** and **Title Cancelled** events.

Select the event and click **Next** to continue.

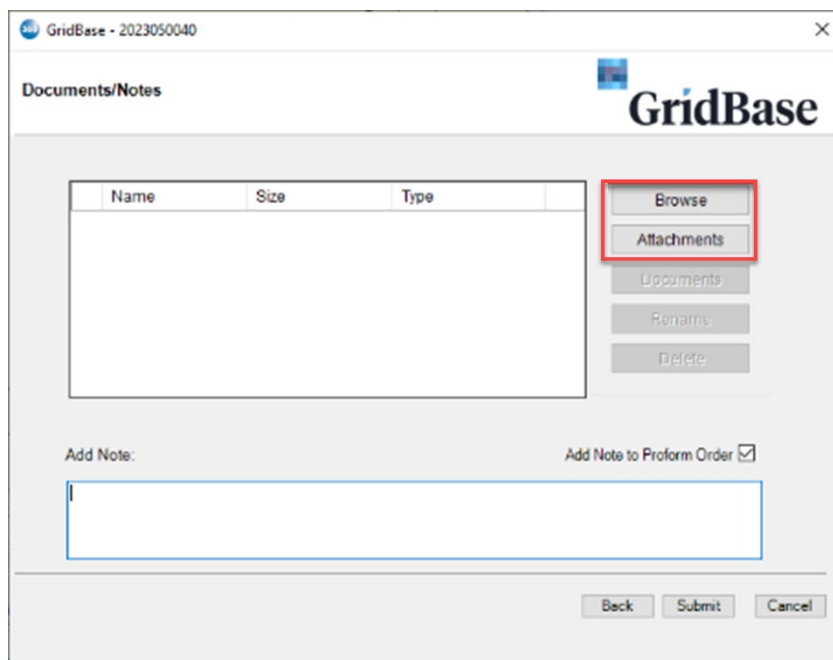
In this example, a document is selected.



All events have the option to add a document or note via the **Documents/Notes** window. The Event Information screen is presented, with the event type indicated in the upper left of the screen – in this instance 'Document' was the event selected.

Click the **Browse** button to browse out to a file/folder location to select a file.

Click **Attachment** button to attach a document from Attachments & Document History in Select.



Once a document is selected, it appears in the Name column. From the **Type** drop-down, the type of document being sent must be selected, click the drop-down arrow to select from the list of document types. This is a required field, as indicated by the red asterisk.

Name	Size	Type
Test PDF Docum...	32.27 KB	--Select--

Buttons: Browse, Select--, Documents, Rename, Delete

Add Note: Additional Notes can be sent

Add Note to Proform Order ☒

Buttons: Back, Submit, Cancel

The document description defaults to the name of the communication selected but can be modified by clicking the **Rename** button. If the wrong document was selected, it can be removed by clicking the **Delete** button. Additional information can be added in the **Add Note** field.

Click the **Submit** button to send the commitment and data to Gridbase.

### *Update to an existing Gridbase Transaction*

If an update on an existing transaction is received in the queue, and you do not wish to accept the updates into the order, uncheck the boxes for data you wish to exclude. Click the **Accept** button once completed.