Punctual Abstract
User Guide (v1.0)

April, 2022

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Table of Contents

Table of Contents

History

| Date	Details
02/28	Initial Draft

Introduction

Punctual Abstract, allows agents to order Title Search products via SoftPro 360. The Punctual Abstract integration with SoftPro 360 provides users with the ability to seamlessly place orders for Punctual Abstract products and receive the results of those orders within SoftPro 360. Users will be able to submit an order, track the status of their requests and receive data/documents from Punctual Abstract all from within SoftPro 360.
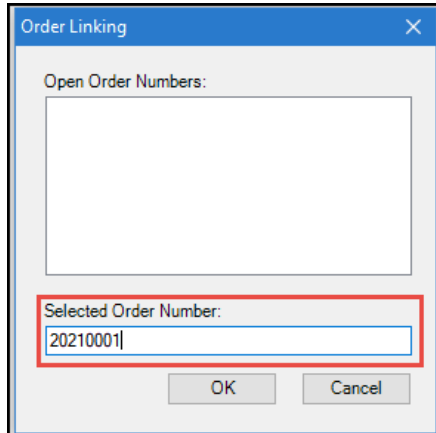
Accessing

From the **360 Services** menu, double-click **Punctual Abstract** located under the **Title Services** folder. This will open the **Order Linking** screen:

1. Select the Services tab
2. Click the Settlement Services folder to expand
3. Double-click **Punctual Abstract – Title Services**
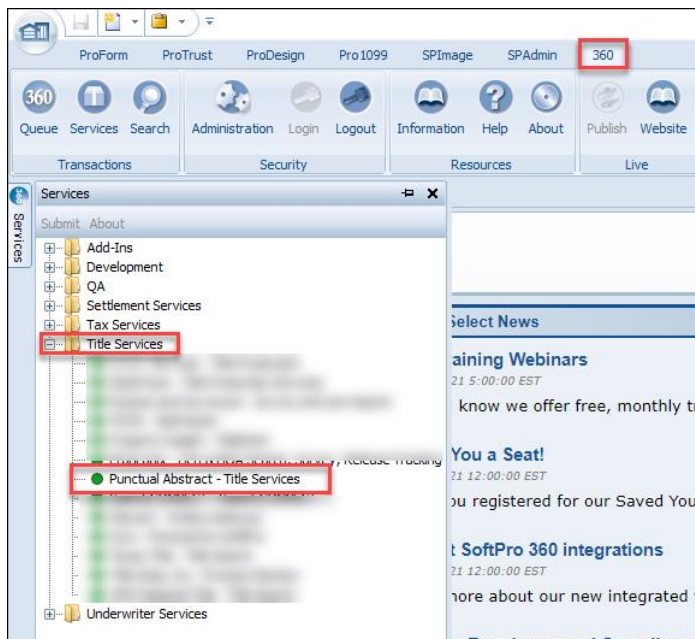
Select a ProForm Order for Your Search

You must link each transaction to a ProForm Order. If you already have ProForm order(s) open, the Active order will be automatically linked. If you do not have an active order open, you can enter the order number in the **Selected Order Number** field. Once you have confirmed the order, click **OK**:
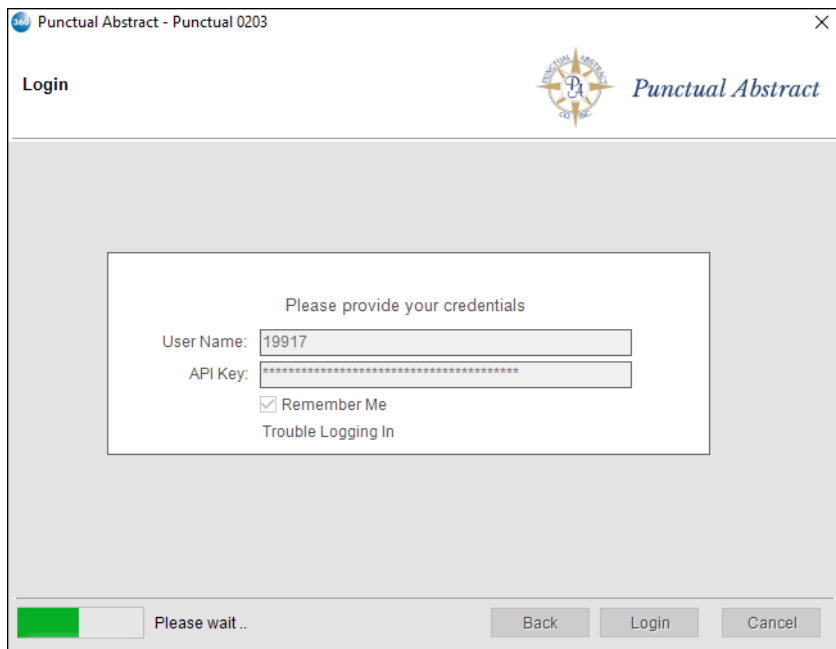

Logging into Punctual Abstract

The login screen requires you to enter a valid **User Name** and **API Key**. Clicking on the '**Remember me**' check box will allow you to log in automatically when you launch the product in future sessions. If you do not have a valid user name and password click on the '**Trouble Logging In**' link which will open an email for the user to request assistance with log in credentials.

Clicking on the **Login** button will continue to the **Property and Product Selection** Screen

Order Summary Screen

The **Property and Product Selection** screen allows the user to select the **Property** (if multiple properties exist on the order), **Service**, **Need By Date**, and **Priority**. User can also **Add Documents**, before submitting a request to Punctual Abstract.

- **Property(s):** Information for the properties added within the ProForm order will populate into the fields.
  - o Changes to the property information will have to be done within the ProForm order.
- **Need By Date:** User can add a due date to submit with the request.
- **Select Service:** Select to add service to be submitted with request.
- **Priority:** Select to add priority to be submitted with request.
- **Notes:** Add a note to send with your request (Add to ProForm Notes is selected by Default)
- **Add Documents:** Click this link to add documents to be included in your request to Punctual Abstract. See the Attaching Document(s) section of this guide for more detail.

Attaching Document(s)

The **Add Document(s)** screen allows the user to attach documents before submitting the request to Punctual Abstract. After selecting documents, click **Close**:
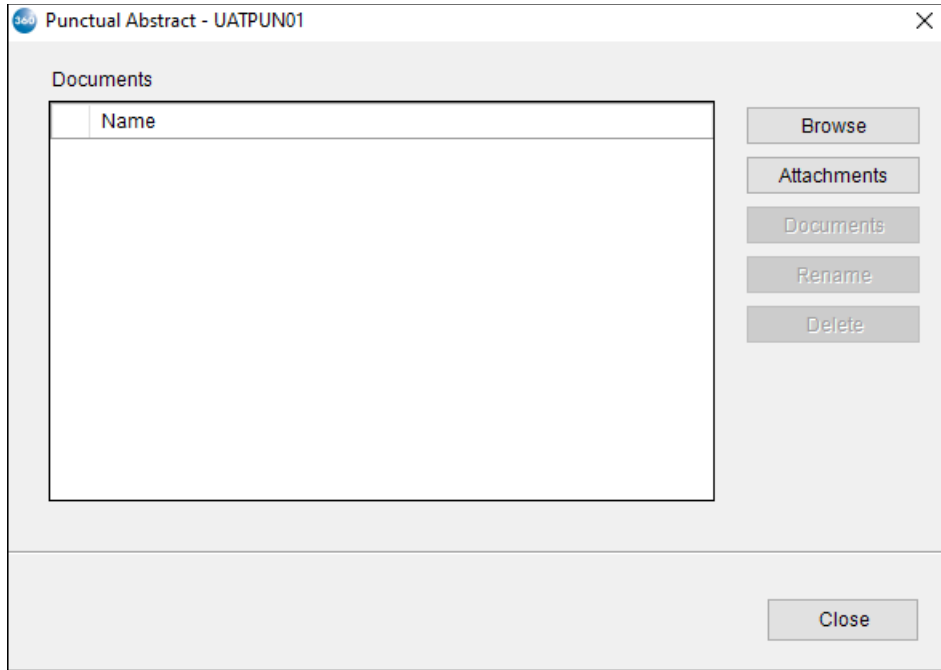
- **Browse:** Browse to find documents to submit.
- **Attachments:** Attach documents from the ProForm order.
- **Documents:** This button is not applicable to Punctual Abstract transactions at this time.
- **Rename**: Rename the documents before submitting.
- **Delete:** Delete documents from the list of documents before submitting
-

Accepting Data & Document(s)

In the 360 queue the transaction status will show as **Ready** when data and documents have been sent from Punctual Abstract. The transaction status will be **Ready** which indicates a response has been received and is ready to be reviewed. The user will click **Next step** to review the data and documents.

Review Screen

The **Review** screen allows the user to view, copy, and accept documents from Punctual Abstract into the Select order.

- **View:** View documents sent from Punctual Abstract
- **Copy:** Save a copy of the document to the clipboard.
- **Accept:** Attach the document(s) to the Select order.
- **Overwrite Requirements/Exceptions:** When this option is checked, requirements and exceptions saved to the ProForm order will be removed and only the latest requirements and exceptions will be added to the ProForm order.

The accepted documents will be saved as attachments section of the ProForm order.

Updating a Transaction

In the 360 queue you can request an update for a transaction that has already been **Accepted**.

1. Click on **Next Step**
2. In the **Date Down** Screen enter the new **Need By** Date
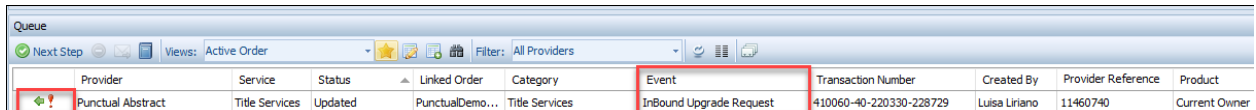3. Add a **Note** to submit with your update request (Optional)
4. Click **Submit**

Accepting an Upgrade Request

For some requests, Punctual may ask a user to upgrade their original request. Punctual will then send an Upgrade Request to SoftPro. In the 360 queue the transaction status will show as **Updated** when Punctual is requesting approval for an upgrade request.
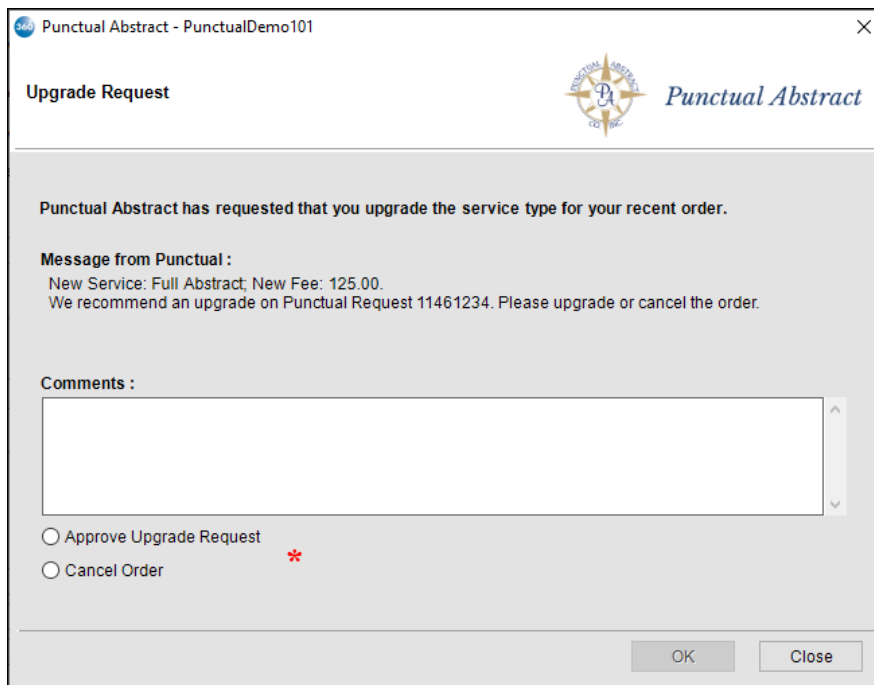
1. The 360 Transaction will display an Exclamation Mark with an Event of **InBound Upgrade Request**
2. Click on **Next Step**

3. The **Upgrade Request** screen will allow the user to **Approve Upgrade Request** or **Cancel** the order. Comments are required if the user chooses the **Cancel Order** option.