

Punctual Abstract User Guide (v1.0)

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History

| Date | Details |
|-------|---------------|
| 02/28 | Initial Draft |

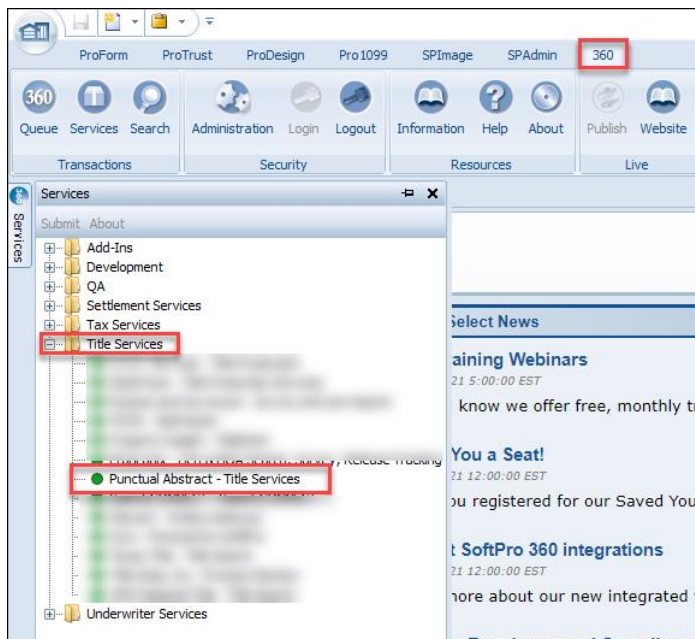
Introduction

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

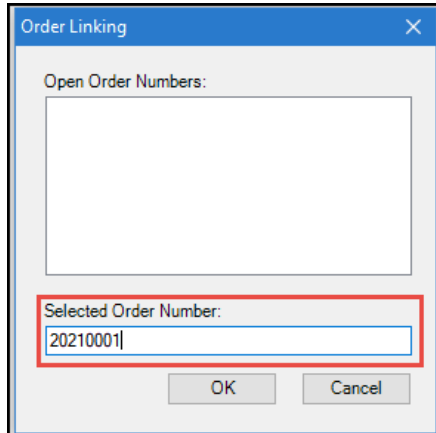
From the **360 Services** menu, double-click **Punctual Abstract** located under the **Title Services** folder. This will open the **Order Linking** screen:

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**:

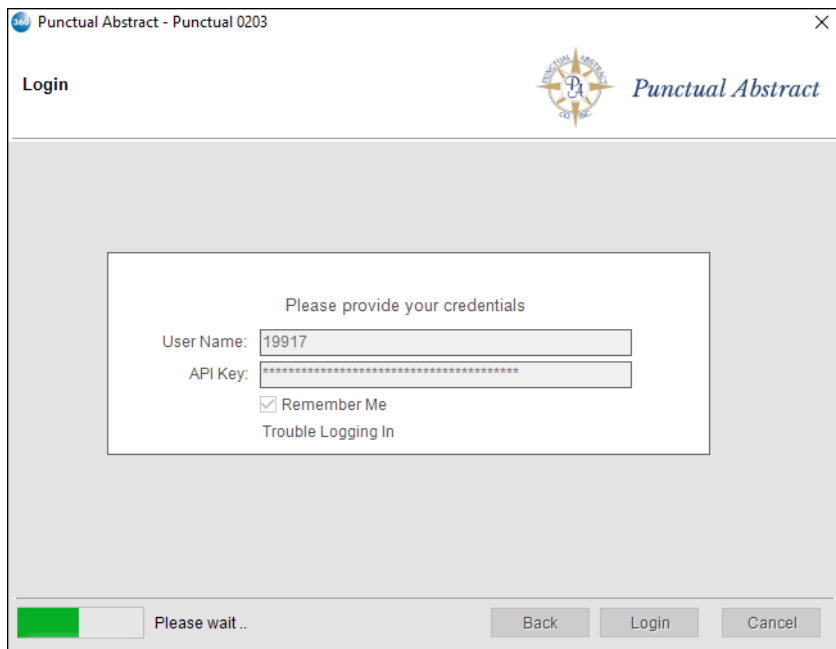


The 'Order Linking' dialog box features a blue title bar with a close button. It contains two text input fields. The first field, labeled 'Open Order Numbers:', is empty. The second field, labeled 'Selected Order Number:', contains the text '20210001' and is highlighted with a red rectangular border. At the bottom of the dialog are two buttons: 'OK' and 'Cancel'.

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



The 'Punctual Abstract - Punctual 0203' login window has a blue title bar. The main area has a light gray background. At the top left is the word 'Login'. At the top right is the Punctual Abstract logo, which includes a circular emblem with a compass rose and the text 'Punctual Abstract'. In the center is a white rectangular box with the heading 'Please provide your credentials'. Inside this box are two text input fields: 'User Name:' with the value '19917' and 'API Key:' with a masked value of 15 asterisks. Below these fields is a checked checkbox labeled 'Remember Me' and a link labeled 'Trouble Logging In'. At the bottom of the window is a status bar with a green progress indicator, the text 'Please wait ..', and three buttons: 'Back', 'Login', and 'Cancel'.

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.

Punctual Abstract - Punctual 0203

Property And Product Selection

Property:

| <input type="checkbox"/> | Property Address | City | State | Zip |
|-------------------------------------|------------------------|------------------|-------|-------|
| <input checked="" type="checkbox"/> | 1234 Sunny Isles Drive | Hialeah Garde... | FL | 33018 |
| <input type="checkbox"/> | 7458 Test Drive | Miami Lakes | FL | 33018 |
| <input type="checkbox"/> | 1458 Miami Lakes Drive | Homestead | FL | 33030 |
| <input type="checkbox"/> | 5896 12th Street | Coral Gables | FL | 33114 |

County: Miami-Dade County

Need By:

Select Service: -Select Service-

Priority: ☒ Normal ☐ Priority ☐ Rush

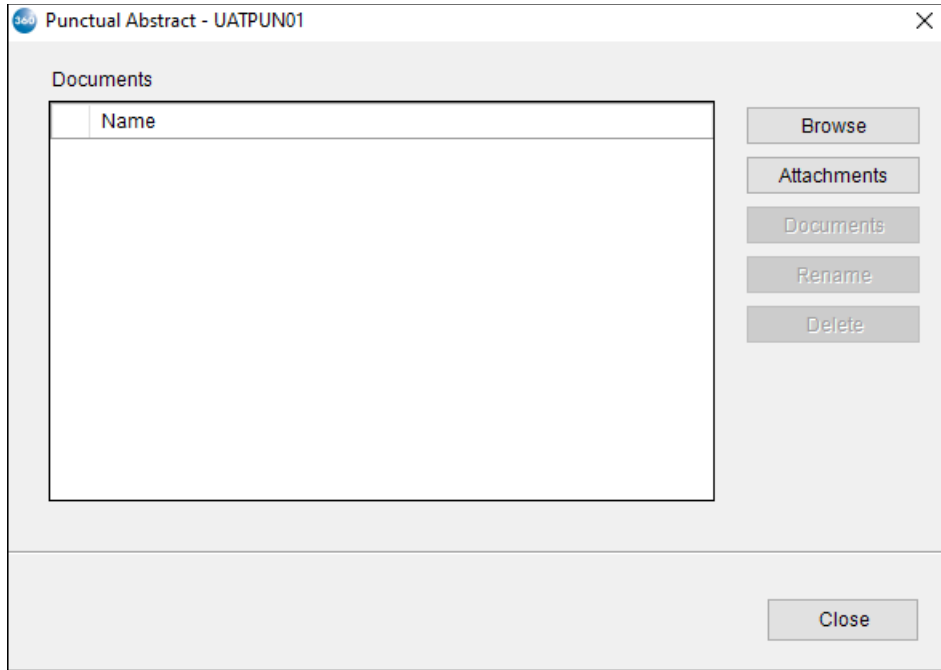
Notes: ☒ Add to Proform Notes

[Add Documents](#)

- **Property(s):** Information for the properties added within the ProForm order will populate into the fields.
 - 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.

| Queue | | | | | | | | | |
|---|----------------|--------|-----------------|-------------------|----------------|----------|-----------------------------|----------------------|-------------------------|
| Views: Active Order Filter: All Providers | | | | | | | | | |
| Provider | Service | Status | Linked Order | Created On | Category | Provider | Description | Product | Transaction Number |
| Punctual Abs... | Title Services | Ready | PunctualDemo101 | 1/25/2022 8:49 AM | Title Services | 11460373 | N Larkey Road N Larkey Road | Abstract/Full Search | 410060-70-220125-007843 |

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.

Review Punctual Abstract - PunctualDemo101

Select All Select None Field Codes

Groups

Data

| Name | Current Value | New Value |
|-------------------|---------------|--------------------------------------|
| Street Address | | N Larkey Road N Larkey Road |
| City | | Oxford |
| State | | CT |
| Zip | | 06478 |
| County | | New Haven County - Oxford |
| Legal Description | | All that certain real property si... |

Documents

| View | Copy | File Name | File Size (KB) | Transferred |
|-------------------------------------|------|-----------|----------------|-------------|
| <input checked="" type="checkbox"/> | | test | 7 | 100% |
| <input checked="" type="checkbox"/> | | test_1 | 39 | 100% |

☐ Overwrite Requirements/Exceptions

Accept Cancel

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**

| Queue | | | | | | |
|---|----------------|----------|-----------------|----------------|-------------------------|--|
| Views: Active Order Filter: All Providers | | | | | | |
| Provider | Service | Status | Linked Order | Category | Transaction Number | |
| Punctual Abstract | Title Services | Accepted | PunctualDemo... | Title Services | 410060-40-220330-228723 | |

Punctual Abstract - PunctualDemo101

Date Down for Punctual Request 11460739

 *Punctual Abstract*

Property :

3116 West 72nd Street, Hialeah, FL 33018

County :

Miami-Dade County

Service :

Update

Need By :

Priority

☒ Normal ☐ Priority ☐ Rush

☒ Add to Proform Notes

Notes:

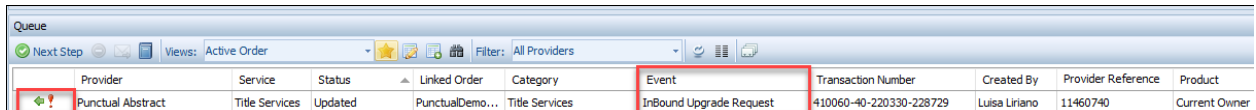
[Add Documents](#)

Submit Cancel

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.

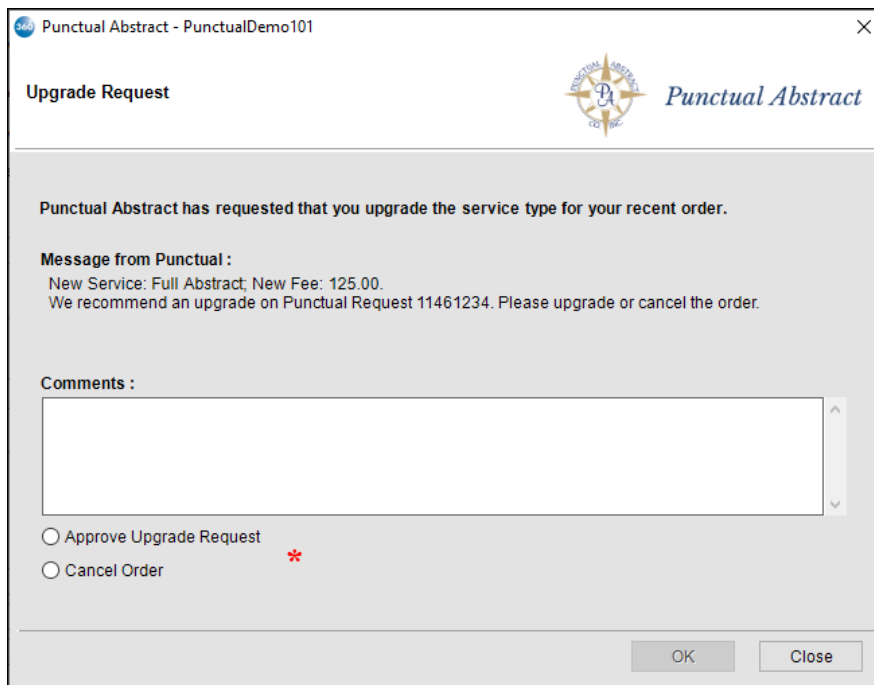
1. The 360 Transaction will display an Exclamation Mark with an Event of **InBound Upgrade Request**
2. Click on **Next Step**



The screenshot shows a software interface titled 'Queue'. At the top, there is a 'Next Step' button and a 'Views: Active Order' dropdown. Below this is a table with columns: Provider, Service, Status, Linked Order, Category, Event, Transaction Number, Created By, Provider Reference, and Product. The first row of data is highlighted with a red box around the 'Event' column, which contains the text 'InBound Upgrade Request'. The 'Status' column for this row shows 'Updated'.

| Provider | Service | Status | Linked Order | Category | Event | Transaction Number | Created By | Provider Reference | Product |
|-------------------|----------------|---------|-----------------|----------------|-------------------------|-------------------------|---------------|--------------------|---------------|
| Punctual Abstract | Title Services | Updated | PunctualDemo... | Title Services | InBound Upgrade Request | 410060-40-220330-228729 | Luisa Liriano | 11460740 | Current Owner |

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.



The screenshot shows a dialog box titled 'Punctual Abstract - PunctualDemo101'. The main heading is 'Upgrade Request'. Below the heading is the Punctual Abstract logo. The text inside the dialog reads: 'Punctual Abstract has requested that you upgrade the service type for your recent order.' followed by 'Message from Punctual : New Service: Full Abstract; New Fee: 125.00. We recommend an upgrade on Punctual Request 11461234. Please upgrade or cancel the order.' There is a 'Comments :' label above a text input field. At the bottom, there are two radio buttons: 'Approve Upgrade Request' and 'Cancel Order'. A red asterisk is next to the 'Cancel Order' option. At the very bottom are 'OK' and 'Close' buttons.

Punctual Abstract - PunctualDemo101

Upgrade Request

Punctual Abstract

Punctual Abstract has requested that you upgrade the service type for your recent order.

Message from Punctual :
New Service: Full Abstract; New Fee: 125.00.
We recommend an upgrade on Punctual Request 11461234. Please upgrade or cancel the order.

Comments :

☐ Approve Upgrade Request

☐ Cancel Order *

OK Close