

Pythonic File Opening User Guide

September 2023

4800 Falls of Neuse Road, Suite 600 | Raleigh, NC 27609
p (800) 848-0143 | f (919) 755-8350 | www.softprocorp.com

Copyright and Licensing Information

Copyright © 1987–2024 by SoftPro, Raleigh, North Carolina.

No part of this publication may be reproduced in any form without prior written permission of SoftPro. For additional information, contact SoftPro, 4800 Falls of Neuse Road, Raleigh, NC 27609, or contact your authorized dealer.

Microsoft, Windows, and MS-DOS are registered trademarks of Microsoft Corporation in the United States and/or other countries. WordPerfect is a registered trademark of Corel Corporation. Crystal Reports is a registered trademark of SAP AG. HP LaserJet is a registered trademark of Hewlett Packard Development Company, L.P. GreatDocs is a registered trademark of Harland Financial Solutions Incorporated. RealEC Technologies, Inc. is majority owned by Lender Processing Services. All other brand and product names are trademarks or registered trademarks of their respective companies.

IMPORTANT NOTICE – READ CAREFULLY

Use of this software and related materials is provided under the terms of the SoftPro Software License Agreement. By accepting the License, you acknowledge that the materials and programs furnished are the exclusive property of SoftPro. You do not become the owner of the program but have the right to use it only as outlined in the SoftPro Software License Agreement.

All SoftPro software products are designed to ASSIST in maintaining data and/or producing documents and reports based upon information provided by the user and logic, rules, and principles that are incorporated within the program(s). Accordingly, the documents and/or reports produced may or may not be valid, adequate, or sufficient under various circumstances at the time of production. UNDER NO CIRCUMSTANCES SHOULD ANY DOCUMENTS AND/OR REPORTS PRODUCED BE USED FOR ANY PURPOSE UNTIL THEY HAVE BEEN REVIEWED FOR VALIDITY, ADEQUACY AND SUFFICIENCY, AND REVISED WHERE APPROPRIATE, BY A COMPETENT PROFESSIONAL.

Table of Contents

Introduction 4

Accessing New Orders in the SoftPro 360 Queue..... 5

Linking the Transaction to a ProForm Order..... 6


Introduction

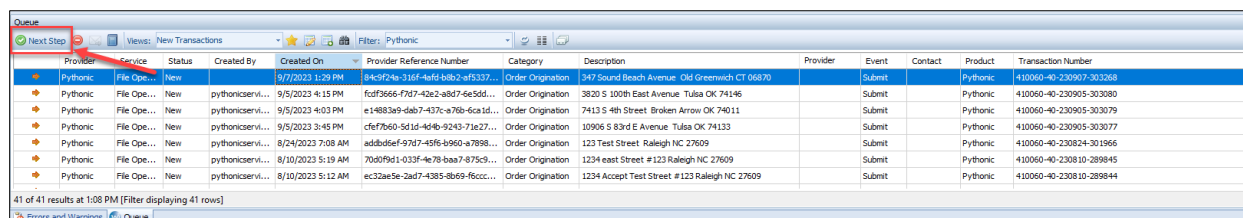
The SoftPro 360 integration with Pythonic provides the ability to receive Title and Escrow order requests from Pythonic. In addition to accepting order requests, a new order can be created with data seamlessly flowing into ProForm increasing productivity, efficiency and removing data re-entry.

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 Pythonic appear in the SoftPro 360 **Queue** under the **New Transactions View** as a single transaction. The **Provider** column displays **Pythonic**, the **Status** column displays as **New** with the **Description** column showing the property address.

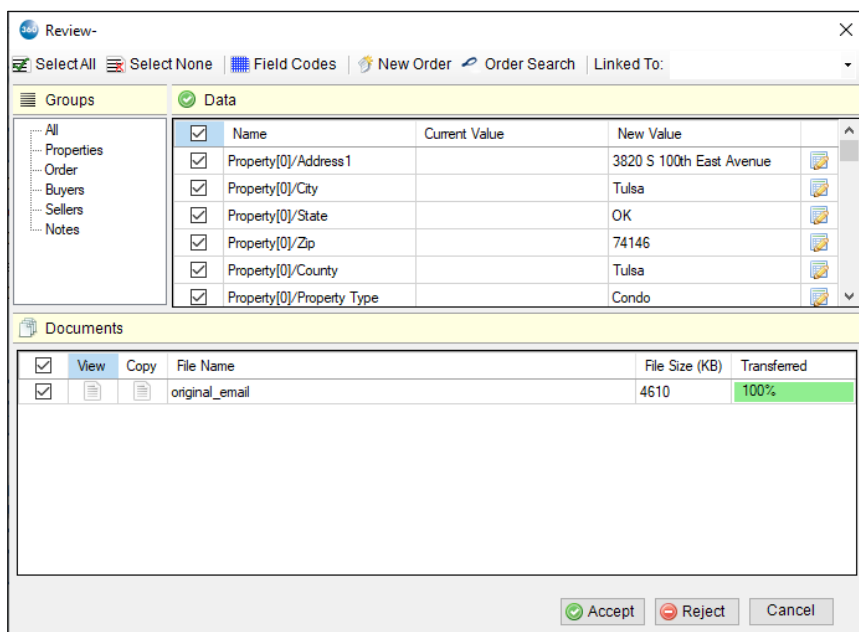
To review a new transaction, highlight the transaction, and click the **Next Step**  button at the top left of the **Queue** toolbar.



Provider	Service	Status	Created By	Created On	Provider Reference Number	Category	Description	Provider	Event	Contact	Product	Transaction Number
Pythonic	File Op...	New	pythonicservi...	9/7/2023 1:29 PM	84c9f24e-316f-4e0d-b0b2-af5337...	Order Origination	347 Sound Beach Avenue Old Greenwich CT 06870		Submit		Pythonic	410060-40-230907-303268
Pythonic	File Op...	New	pythonicservi...	9/7/2023 4:15 PM	fdf3666-f7d7-42e2-a8d7-6e5dd...	Order Origination	3820 S 100th East Avenue Tulsa OK 74146		Submit		Pythonic	410060-40-230905-303080
Pythonic	File Op...	New	pythonicservi...	9/5/2023 4:03 PM	e14883a9-dab7-437c-a76b-6ca1d...	Order Origination	7413 S 4th Street Broken Arrow OK 74011		Submit		Pythonic	410060-40-230905-303079
Pythonic	File Op...	New	pythonicservi...	9/5/2023 3:45 PM	cfef7b60-5d1d-4d4b-9243-71a27...	Order Origination	10906 S 83rd E Avenue Tulsa OK 74133		Submit		Pythonic	410060-40-230905-303077
Pythonic	File Op...	New	pythonicservi...	8/24/2023 7:08 AM	addb8def-97d7-45f6-b960-a7898...	Order Origination	123 Test Street Raleigh NC 27609		Submit		Pythonic	410060-40-230824-301966
Pythonic	File Op...	New	pythonicservi...	7/30/2023 5:19 AM	70d0f9d1-033f-4e78-baa7-875c9...	Order Origination	1234 east Street #123 Raleigh NC 27609		Submit		Pythonic	410060-40-230810-289845
Pythonic	File Op...	New	pythonicservi...	8/10/2023 5:12 AM	ec32ae5e-2ad7-4385-8b69-f6ccc...	Order Origination	1234 Accept Test Street #123 Raleigh NC 27609		Submit		Pythonic	410060-40-230810-289844

The **Review** screen displays all the data and documents sent from Pythonic to SoftPro 360.

The data should be reviewed carefully before acceptance.



Review-

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

Groups

Data

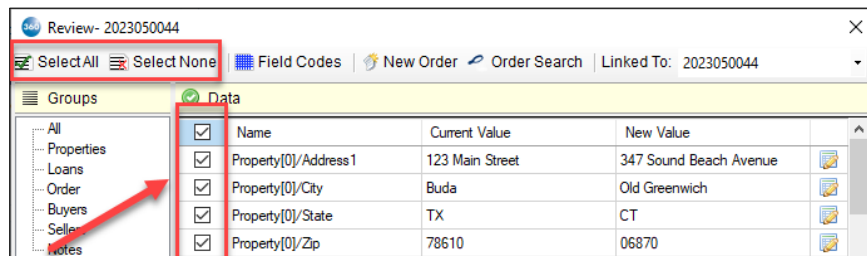
	Name	Current Value	New Value
<input checked="" type="checkbox"/>	Name		
<input checked="" type="checkbox"/>	Property[0]/Address1		3820 S 100th East Avenue
<input checked="" type="checkbox"/>	Property[0]/City		Tulsa
<input checked="" type="checkbox"/>	Property[0]/State		OK
<input checked="" type="checkbox"/>	Property[0]/Zip		74146
<input checked="" type="checkbox"/>	Property[0]/County		Tulsa
<input checked="" type="checkbox"/>	Property[0]/Property Type		Condo

Documents

	View	Copy	File Name	File Size (KB)	Transferred
<input checked="" type="checkbox"/>			original_email	4610	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. The check box in the header row (**Name**, **Current Value** and **New Value**), when checked, checks all fields below; if unchecked, all fields below are unchecked. By default all check boxes are checked. The **Select All** and **Select None** buttons, in the toolbar, have the same affect.



Review- 2023050044

Select All
Select None
Field Codes
New Order
Order Search
Linked To: 2023050044

Groups

Data

	Name	Current Value	New Value
<input checked="" type="checkbox"/>	Name		
<input checked="" type="checkbox"/>	Property[0]/Address1	123 Main Street	347 Sound Beach Avenue
<input checked="" type="checkbox"/>	Property[0]/City	Buda	Old Greenwich
<input checked="" type="checkbox"/>	Property[0]/State	TX	CT
<input checked="" type="checkbox"/>	Property[0]/Zip	78610	06870

The incoming data sent from Pythonic 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.

Name	Current Value	Field Code	New Value
Property[0]/Address1	123 Main Street	Properties[1].Address...	347 Sound Beach A...
Property[0]/City	Buda	Properties[1].Address...	Old Greenwich
Property[0]/State	TX	Properties[1].Address...	CT
Property[0]/Zip	78610	Properties[1].Address...	06870
Property[0]/County		Properties[1].County	Fairfield

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 shows all of the data being presented for the order.

Name	Current Value	Field Code	New Value
Buyers[0]/IndivOrOrg			
Buyers[0]/Type			
Buyers[0]/Name			
Buyers[0]/Email			
Buyers[0]/Phone			

If the new order has a document attached to it, the document appears in the **Document** section of the screen. By default, all documents are checked to include when importing the order. Documents are pushed to the **Attachments/Document History** for Select.

View	Copy	File Name	File Size	Transferred
<input checked="" type="checkbox"/>		original_email	4610	100%

Documents can be viewed on screen by clicking the **PDF** icon or click the **Copy** icon to copy to the clipboard.

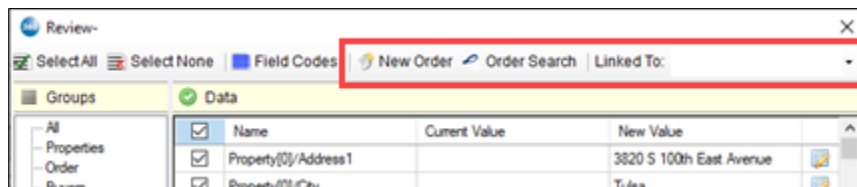
View	Copy	Description	File Name
<input checked="" type="checkbox"/>		original_email	original_email

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.

- Create a New Order - Click the **New Order** button to open the **ProForm New Order** dialog. Once the new order information (Prefix, Suffix, Order Number, Trust account and template) has been entered click **OK**. The new order number populates the **Linked To** field on the **Review** screen.
- Search for an Order - 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 the **Linked To** field on the **Review** screen.

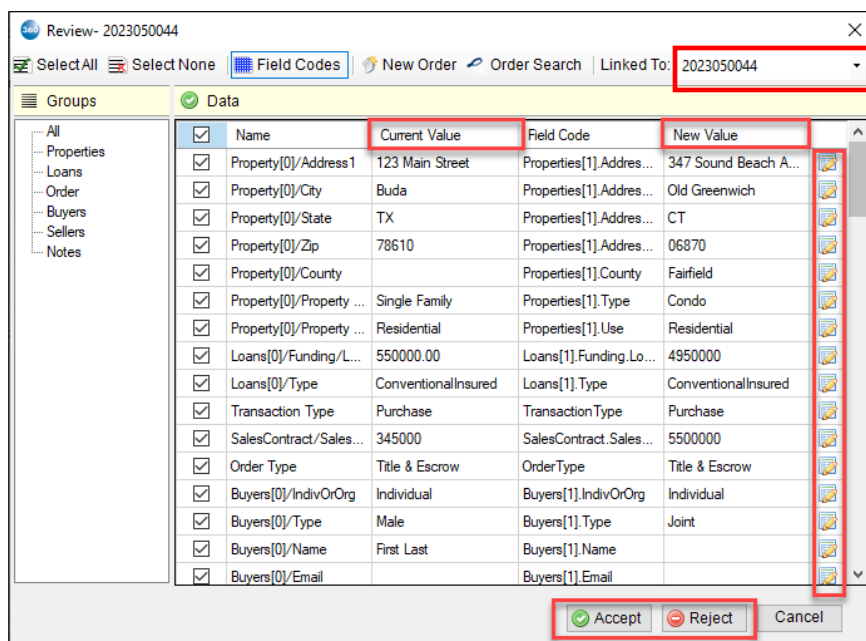
- Link to an Opened Order - If the ProForm order that the data should be entered into is already open, click the **Linked To** drop-down and select the ProForm order number.



Once the ProForm order number is selected and displayed in the **Linked To** field, the existing data populates 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.



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 the SoftPro 360 **Queue** updates to **In Progress**.

The order can be rejected by clicking the **Reject** button. After clicking the **Reject** button, you are prompted to confirm "Are you sure you want to reject?".

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

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

