

# Pythonic Automated CD Processing User Guide

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### **History**

Date	Version	Details
5.12.2023	1.0	Initial Product

## Introduction

This integration between SoftPro and Pythonic will allow SoftPro users to launch an interface to upload a closing disclosure document. The closing disclosure document (pdf) will be submitted to Pythonic in which they will utilize their Optical character recognition (OCR) technology to remit back parsed organized data from the closing disclosure.

## Accessing the Vendor Services

- 1. Select the Services tab
- 2. Click the Settlement Services folder to expand
- 3. Double-click Pythonic Automated CD Processing

## Logging into Pythonic

Pythonic offers a single sign-on process for SoftPro users. You will be presented with the **Welcome** screen and after clicking **Next**, the users Email Address, Serial Number, and Organization information is obtained to send to Pythonic with your request.



Click Cancel to exit the Welcome screen.

Click Next to continue to the Lender Closing Disclosure Upload screen.

# Lender Closing Disclosure Upload

The Lender Closing Disclosure Upload screen allows the user to submit the Closing disclosure to Pythonic to parse the data and send back to import into the SoftPro Order.

When a document is selected, you will see the document in the table where you are able to rename or delete the document.

- Browse allows you to choose a document from your local storage.
- Attachments allows you to choose attachments in your order.
- Rename allows you to rename the selected document.
- Delete allows you to delete the selected document.

NOTE: Only one document may be uploaded and sent to Pythonic

Click Cancel to exit the Documents screen.

Click **Submit** to send your request to Pythonic.

Click **Back** to return to the **Form Detail** screen.

Once your request has been submitted to Pythonic, you will receive a message 'Your request has been successfully sent to Pythonic. You can expect to receive your results in the 360 queue within minutes.' Click OK to exit the integration.



💩 Pyth	onic - 2023050040	×
Lender	Closing Disclosure Upload	🔯 PYTHONIC
	Name	Browse
	Test PDF Document.pdf	Attachments
		Documents
		Rename
		Dalata
		Delete
		Back Submit Cancel

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## **Reviewing Data sent by Pythonic (Select Fields to Import Screen)**

Once Pythonic has sent the data from the closing disclosure to the order, the transaction status will change the 'Ready'. You can click on the transaction, and Next Step will activate.

Queu	Queue									
0	lext Step 💿	🖂 📄 Views: Active C	Order	- 😭	📝 🐻 🛗 Filter	: Pythonic	*	ý II 🗇		
	Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On	Completed On	Description	Transaction Number
<del>ج</del>	Pythonic	Automated CD Processing	Ready	2023050045	Default	Derek Ball	6/12/2023 2:30 PM			410060-70-230612-129932
1 of	1 results at 2:	31 PM [Filter displaying 1	rows]							
🐞 Б	rrors and Warr	nings 🚳 Queue								

By clicking on Next Step, the **Select** Fields to Import screen will load. This screen will display all of the fields sent by Pythonic to upload into your order. Under the Show drop down, you can select to show All or Differences. All option will allow display all of the data sent by Pythonic. Differences option will allow display only the fields that are different from your ProForm order and what Pythonic has sent.

Pythonic - 2023050045				
Select Fields to Import			형 рүтно	NIC
			Show: Differe	nces 🗸
⊟ Al	Name	Order Value	Lender Value	^
- Order Details	Issued Date		09/27/2021	
Buyers	CDF Page 1 File Number	2023050045	173479	
Sellers	Loan Amount	\$875,000.00	\$200,000.00	
Listing Agents	Include Personal Property On CDF	True	False	
Loan	Buyer 2 Individual Or Organization		Individual	
- Tem	Buyer 2 Full Name		Ginny Weasley	
Payments	Buyer 2 First Name		Ginny	
	Buyer 2 Last Name		Weasley	
	Buyer 2 Email		ginny.weasley@test.com	
	Buyer 2 Phone		(123)456-7890	
	Seller Phone	123-456-7890	(123)456-7890	
	Seller 2 Individual Or Organization		Individual	
	Seller 2 First Name		Hany	
	Seller 2 Last Name		Potter	
	Seller 2 Email		harry.potter@test.com	
	Seller 2 Phone		(123)456-7890	
	Seller 2 Address 1		815 Plantation Drive	
	Seller 2 City		Callaway	
				~
			Next	Cancel

Click Next to continue to the Reconcile Fees screen.

Click **Cancel** to exit the Pythonic Integration.

## **Reconcile Fees Screen**

The **Reconcile Fees** screen allows users to review fee data returned by Pythonic.

	ionic - 20	23050045								
con	cile Fee	s							۱	PYTHONIC
mport	Lender U	nreconciled Fees 🛛 🎯				Accep	it Lender D	ifferences 🦁		
	Section	Description	Payee Code	Payee Name	Amount		Section	Order Description	Order Value	Lender Value
$\square$	A	% of Loan Amount (Points)	~	Pythonic Test	\$0.00					
$\bowtie$	A	Our origination charge \$1.0	~		\$1,000.00	1				
$\square$	В	Appraisal Fee	~	Pythonic Test	\$420.00					
	в	Credit Report Fee	~	Pythonic Test	\$30.00					
	В	Rood Certification	~	Pythonic Test	\$165.00					
$\bowtie$	в	MIUpfront Premium	~	Pythonic Test	\$58.00					
	В	Other Loan Fee	~	Pythonic Test	\$250.00 🗸					
	Side Olik	-	Pavee							
	Section	Description	Code	Payee Name	Amount					
ight c	lick on a f	ee to merge 🤨								

#### Import Lender Unreconciled Fees

This area displays fees in the lender's data that are not already in your order. Check the box to import these fees to your order. The grid displays the following fields:

- Section
  - Section of where the fees provided by Pythonic will display on the CDF
- Description
  - o Description of the fee provided by Pythonic
- Payee Code
  - o Contacts provided by Pythonic and Contacts listed in the ProForm order
- Payee Name
  - Payee Name provided by Pythonic
- Amount
  - Amount of the Fee provided by Pythonic

#### Import Lender Unreconciled Fee Fields Screen

This screen will display information in regard to the selected fee. The grid displays the following fields:

- Name
  - Name from
    ProForm Order
- Order Value
  - Value of the Fee in the ProForm Order

360	×
Fee Fields	SOFTPRO 360
Appraisal Fee	
Name	Lender Value
Buyer Paid At Closing	\$320.00
Buyer Paid Before Closing	\$0.00
Seller Paid At Closing	\$0.00
Seller Paid Before Closing	\$0.00
Paid By Others	\$100.00
Include In A P R	False
Fee Туре	AppraisalFee
Payee Name	Pythonic Test Lender
Payee Code	
Payor 3 IsPOC	False
Description	Appraisal Fee
	Close

#### Accept Lender Differences

This area displays fees that exist both in the lender's data and in your order. Fees are matched based on the fee type and CDF section. To accept all lender's changes into your order, check the box. To review details of the lender's changes, click the hyperlink. A detail screen will display to let you choose which of the lender's changes to apply. If you select some but not all of the lender's changes, the main grid will show a blue square instead of a check. If you have merged a fee, you can revert that action by right clicking the fee and selecting Under Merge. The grid displays the following fields:

- Section
  - $\circ$  Section of where the fees provided by Pythonic will display on the CDF
- Order Description
  - Description of the fee provided by Pythonic
- Order value
  - Value listed in the ProForm Order
- Lender Value
  - Value provided by Pythonic

#### Import Lender Unreconciled Fee Fields Screen

This screen will display information in regard to the selected fee. The grid displays the following fields:

- Name
  - Name from
    ProForm Order
- Order Value
  - Value of the Fee in the ProForm Order
- Lender Value
  - Value provided
    by Pythonic

360						×
Fe	e Differences		SOF	TP	RO <sup>*</sup> 36	0
% of Lo	an Amount (Points)			Show:	Differences	$\sim$
	Name	Order Value	Lender Value			
	Buyer Paid At Closing	\$25.00	\$0.00			
	Payee Name	Wells Fargo	Pythonic Test Lender			
				ОК	Cano	el

#### Keep order Unreconciled Fees

This area displays fees in your order that are not in the lender's data. Check the box to keep these fees in your order. The grid displays the following fields:

- Section
  - Section of where the fees provided by
     Pythonic will display on the CDF
- Description
  - Description of the fee provided by Pythonic
- Payee Code
  - o Contacts provided by Pythonic and Contacts listed in the ProForm order
- Payee Name
  - Payee Name provided by Pythonic
- Amount
  - $\circ$  Amount of the Fee provided by Pythonic

<b>660</b>		×
Fee Fields	Se	OFTPRO 360
Appraisal Fee		
Name	Order Value	
Buyer Paid At Closing	\$420.00	
Buyer Paid Before Closing	\$0.00	
Seller Paid At Closing	\$0.00	
Seller Paid Before Closing	\$0.00	
Paid By Others	\$0.00	
Include In A P R	False	
Fee Type	None	
Payee Name	Wells Fargo	
Payee Code	L	
Description	Appraisal Fee	
		Close

#### Fee Fields Screen

This screen will display information in regard to the selected fee. The grid displays the following fields:

- Name
  - $\circ$  ~ Name from ProForm Order ~
- Order Value
  - $\circ$  ~ Value of the Fee in the ProForm Order

Click Back to return to the Select Fields to Import screen.

Click **Finish** to import the data to the ProForm order.

Click **Cancel** to exit the Pythonic Integration.