

Simplifile®

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Introduction

Simplifile[®] is an e-recording solution that allows settlement providers to record documents electronically in over 1700 counties. With the SoftPro[®] 360 Simplifile service, executed documents can be sent for recording directly from a ProForm order. When recorded, the documents can be attached to the order and the recording data imported to the appropriate ProForm fields, thereby eliminating the need for manual scanning and data entry. Additional features allow Select users to automate transaction activity and import actual recording fees and transfer taxes for reconciliation against collected fees.

Sending Documents for e-Recording

Opening the Integration

Locating the Service

Standard and Enterprise

1. There are two ways to access a service in the **Standard** and **Enterprise** versions of ProForm.

🚸 ProForm Standard Edition -	2017120013.PFD
File Reports View Tools	Services Support Window Help
	🖬 🖻 🖻 🛠 H 🛅 🗖 🖉 🕿 🔚 🎫 🖺 📓 📰 🗉 💽 💽 📄

a. Clicking the 360 button opens the SoftPro 360 Console with the Services menu on the left side of the screen. In the expanded Settlement Services section, double-click on Simplifile – eRecording.



b. Clicking **Services** from the toolbar opens a dropdown menu for **360.** Hover over **Settlement Services** and click on **Simplfile – eRecording.**



<u>Select</u>

1. Click the **360** tab and then the **Services** button on the 360 ribbon to open the Services tree.



2. Expand the Settlement Services section and double-click on Simplifile – eRecording.



Order Linking

- 1. In the Order Linking window:
 - a. If multiple orders are opened, select the corresponding order number from the list.
 - b. If a single order is opened, only that order number is displayed.
 - c. If no orders are opened, enter the order number in the Selected Order Number field.

Order Linking		
Open Order Nun	nbers:	
2017120093	Order Linking	
2017110086	Orea Order Numb	
	Open Order Numb	iers:
	2017120093	Order Linking
Selected Order 1 2017120093	Selected Order N	Open Order Numbers:
_	2017120093	
		Selected Order Number:
		2017120093
		OK Cancel

2. Click **OK** to open the **Login** window.

Login Screen

1. In the **Simplifile Login** window, enter the **Username** and **Password** provided by Simplifile when the user's account was set up.

🥶 eRecording - 2017120093	—
Simplifile Login Login to Simplifile or register a new account.	simplifile.
Please enter your username and password or register a	new account.
Username: spselect	
Password:	
Remember me	
Register New Account	
More Information	
Back	Next Cancel

- a. If no account has been set up with Simplifile, clicking on the **Register New Account** link opens a Simplifile web page where a user can set up a Simplifile account.
- b. Checking the **Remember Me** checkbox will save the **Username** and **Password** so that these will be present the next time a user opens the Simplifile service in 360.
- 2. Click the **Next** button to open the **Select a County** window.

Selecting County and Cost Center

The first combo box in this window contains a list of all the counties to which the user can send documents for recording. This list is managed by Simplifile. If the Order has a county and state entered for a property, and the user's account has been set up for that county in Simplifile, then the box displays the property county and state from the Order.

🥹 eRecording - 2017120013	
Select a County Select a county for e-recording.	simplifile.
Please select a county you wou	Auto-populates based on property county and state in ProForm
Pierce County (WA) Please select a cost center you w	vould like to use for e-recording.
1st Advantage Abstract LLC	
Add counties or update account in	nformation on Simplifile's website
	Back Next Cancel

The cost centers listed in the second combo box are also managed by Simplifile. If a user's account has access to more than one cost center, the user can select the cost center to which the recording fees and charges will be invoiced by Simplifile. The cost center selected by the user will be saved so that the next time a user opens the Simplifile service, that cost center will be selected by default.

Adding Documents to a Recording Package

Adding a Single Document

Documents for recording are added and managed in the **Simplifile Document Delivery** screen. Selecting the **Browse** button opens Windows Explorer so the user can add a document to the package from a location outside of ProForm. Selecting the **Attachment** button opens to the Order **Attachments** or **SPImage** so the user can add a document from within the Order. Only a .pdf, .tif or .tiff document can be added.



Adding Multiple Documents

After the user selects a document to add to the recording package, a series of screens will allow the user to manage how the document will be recorded and review what, if any, data from the Order will be sent to Simplifile as part of the recording process. The workflow is as follows:

- 1. Select a county document type;
- 2. Select a ProForm document type; and
- 3. If required by the county for the selected county document type,
 - a. Review or edit certain Order data;
 - b. Select or add Grantors and Grantees; and
 - c. Add a Helper Document.

This workflow applies to each document added to the recording package. After this workflow is completed, the user is returned to the **Simplifile Document Delivery** screen which now displays the

Document Name with the Status for recording.

🥹 eRecording - 2017120002		-
Simplifile Document Delivery Select the documents for submission.	simp	lifile.
Documents in this package:		
Document Name	Status	Browse
Deed	Draft	Attachment
		ReadyDoc
		Modify
		Rename
		Delete
	Back Next	Cancel

To add another document to the package for recording, the user selects **Browse** or **Attachment** to select the document, and proceeds through the workflow until the user is returned again to this **Document Delivery Screen.** This process is repeated until the user has added and configured all the document desired for the recording package.

Selecting **Modify** opens the workflow process for the selected document to allow the user to review or make changes to the selections and data. The user can also **Rename** a document in this screen.

🤓 eRecording - 2017120002	23
Simplifile Document Delivery Select the documents for submission.	lifile.
Documents in this package: Document N Rename Document Deed Type a new name for the document. Mortgage Mortgage-1st	Browse Attachment ReadyDoc Modify Rename Delete
Back Next	Cancel

And the **Delete** button removes the selected document from the grid.

The following sections explain the workflow to set up each document for recording.

Selecting Document Types

Adding a document opens the document type selection window. In this window, the user selects the county document type and the ProForm document type. The document file name will be displayed in the header to show to which document these selections will apply.

🥹 eRecording - 201712	0094			
Current Document	simplifile			
Deed.pdf	simpijne.			
Select from the available	county document types.			
Abandonment	▼			
Choose the correspondi	ng ProForm document type for saving			
recording information to your order.				
IN/A				
	Back Next Skip			

County Document Type

The first combo box lists all the document types that the county supports for e-recording. This list is managed by Simplifile. Clicking on the box opens the list of document types. Clicking on it again closes the list. With the box open, the user can scroll through the list and click on the desired document type to select it.

🥹 eRecording - 2017120094	—
Current Document Deed.pdf	simplifile.
Select from the available count Bargain and Sale Deed Bargain and Sale Deed	y document types.
Bill of Sale Birth Certificate Bond Release Boundary Line Adjust Boundary Line Adjustment Revo	Docation/Rescission
Boundary Line Resolution	k Next Skip

User Tip: If you know the county document type name, you can tab to or click on the box and type the first few letters of the name to quickly navigate to the desired document type.

ProForm Document Type

In Select

The second combo box lists the documents in ProForm where recording information can be saved when the recorded document is returned. At minimum, this box will display the following choices: N/A, Deed 1, Release 1, Assignment 1 and Security Agreement 1.

🥹 eRecording - 2017110089	—		
Current Document Deed.pdf	simplifile.		
Select from the available coun Bargain and Sale Deed	nty document types.		
Choose the corresponding ProForm document type for saving recording information to your order.			
N/A N/A Deed 1	_		
Release 1 Assignment 1 Security Instrument 1 - (\$0.00)			
Ba	ck Next Skip		

In Select, if there are more than one of the ProForm document types with data entered, then the list will display all possible ProForm document types in the Order that could receive recording data. For example, if there are data in the Order for two deeds, two security instruments, two assignments and two existing mortgage liens, like this:

Screen Shot 1: Two Deeds Deeds (2) Instrument Type Grantor Grantee 1 Warranty Deed Other Interested Party, Inc.

Screen Shot 2: Two Security Instruments

00	Sec	curity Instrume	ents		
Loan:	1 🔻	Happy Financia	al Services, Inc. (\$150,000.00)		
Security I		Principal Amount	Lender Name	Loan Number	
Security in	1	\$150,000.00	Happy Financial Services, Inc.	123654	
Instrume	2	\$15,000.00	Friendly Financial Services, I		
MERS reg	istration	n #:			
Borrower	Names	s for Note and Secu	urity Instrument		
Borrower	namec	on the note:	F	Corrower names on the se	acurity inc

Screen Shot: 1: Two Assignments

Security Instruments		
Riders		
Assignments		
+		
Assignor Name	Assignee Name	
Happy Fiinancial Services,Inc.	Real Lending, Inc.	
Bob T. Borrower, Jr. and Betty H. Borrower, husband and	Happy Financial Services, Inc.	

Screen Shot 4: Two Existing Liens

00	Existing Liens					
Existing	Liens (2)					
+ -	▲ ▼					
Priority	Borrower/Mortgagor	Lender/Mortgagee	Document Type	Existing Loan #		
1	Best Builders, LLC	Wells Fargo Bank	Mortgage	98765843		
2	Best Builders, LLC	Construction Lender, Inc.	Mortgage			
Instrume MERS re <u>Mortgage</u>	Instrument type: Mortgage MERS registration #: Mortgagor/Mortgagee Information					
Given by	Given by (Borrower/Mortgagor): Best Builders, LLC					
Lien Rele	ease Recording Informatio	<u>n</u>				
Dated: 12/12/2017 V Date/Time recorded: (None)						
Recorded at/in:						
Place recorded:			· / ·			
Place re	-recorded:					

Then the ProForm documents type combo box will list those document types as:

🥯 eRecord	ling - 2017120094		23
Simplifi	eRecording - 2017120094		ile.
Selec	Current Document	simplifile	
Docun	Deed.pdf	simpingite.	
Doc	Select from the available co	unty document types.	owse
Deed	Bargain and Sale Deed	•	chment
	Choose the corresponding F recording information to you	ProForm document type for saving r order.	adyDoc
	N/A	•	odify
	N/A Deed 1 Cood		ename
	Release 1 Existing Li	en Release	elete
	Assignment 1 Assignment 2 Assignment 2	nent (under Security Instruments)	
l	Security Instrument 1 - Happ Security Instrument 2 - Friend	y Financial Services, Inc. (\$150,000.00) Ily Financial Services, Inc (\$15,000.00)	ancel

The user would select Deed 1 if the user wants the recording information to be imported to the recording fields for Deed 1.

Deeds (2)			
+			
Instrument Type		Grantor	Grantee
1 Warranty Deed		Best Builders, LLC	Bob T. B
2 Warranty Deed		Other Interested Party, Inc.	Bob T. B
Instrument type:	Warranty Deed	×	
Instrument date:	12/07/2017 💌	Date/Time recorded: (None)	•
Recorded at/in:			
Place recorded:			

🥹 eRecording - 2017120094	—					
Current Document Deed.pdf	simplifile.					
Select from the available cour Bargain and Sale Deed Choose the corresponding Pro- recording information to your	Select from the available county document types. Bargain and Sale Deed Choose the corresponding ProForm document type for saving					
Deed 1						
Ba	ck Next Skip					

Select the ProForm document type that corresponds to the document being recorded so that the recording information (recording date and time, book, page and/or instrument number) will be returned and imported into the Order in the correct recording data fields.

In Standard and Enterprise

Because of how ProForm works in the Standard and Enterprise versions, SoftPro 360 is unable to determine how many loans, assignments and releases are in an Order. As a result, the ProForm document type combo box lists all possible document types for an Order.

🥶 eRecordi	ng - 2017120003		8
Simplifi	eRecording - 201712000	3	∍îile]
Selec	Current Document	simplifile	•
Docun Doc Deed	Select from the available co Deed Record	unty document types.	owse chment
	Choose the corresponding F recording information to you	ProForm document type for saving ir order.	adyDoc odify
	N/A Deed 1 Release 1 Release 2 Release 3 Release 4 Release 5 Assignment 1	List in Standard and Enterprise	elete
	Assignment 2 Assignment 3 Security Instrument 1 Security Instrument 2 Security Instrument 3		Cancel

Therefore, it is important that the user select a ProForm document type that is available in the Order so that the recording data is imported correctly. For example, if there is only one Security Instrument in the Order (only an Order opened as a HUD type can have up to three loans/security instruments), selecting

Security Instrument 1 to record a mortgage would allow the recording data to be imported to the recording fields for the **Security Instrument** in ProForm:

8) Security Instruments, Trustee & Riders (2017120002.PFD)						
Security Instrument						
Document:	Mortgage					
Security Instrument & Note Dated:	12/07/2017 Date Recorded: / /	at: : · M				
MERS Registration Number:						
Recorded At/In: Book	Page	Document Number				
Place Recorded:						
Place Re-Recorded:						
	1st Loan - Assignments					

If **Security Instrument 2** was selected, importing the recording data, when Accepting the recorded instrument, and the Order was a CD order, the data would have no place to go. A message would be displayed saying that the data could not be imported.

18) Security Instruments, Trustee & Riders (2017120002.PFD) Assignments (2017120002.PFD) Assignment 1 Document:
 Mortgage Deed of Ti Assignor Full Legal Name: First Ever Savings & Loan Association of North Carolina * Security Instrument & Note Dated: 12/07/2017 Date Re Address: P. O. Box 90012 Lenderville_NC 23457 MERS Registration Number: Organized Under the Laws of: State of North Carolina Recorded At/In: Book Page Assignee Full Legal Name: * Place Recorded: Address • Place Re-Recorded Organized Under the Laws of: 1st Loan - Assignments Consideration Amount: Trustee Information Interest from Date: / / Trustee Nam Document Dated: 1/ / Date Recorded: / / at: : · M of Recorded At/In: Book Page Document Number Place Recorded Address: Place Re-Recorded: Second Trustee Name of Assignment 2 Assignor Full Legal Name: * Assignee Full Legal Name: * Trustee's Fee Percentage Minim Document Dated: // Date Recorded: / / at: : · M FNMA, FHA & VA Riders Recorded At/In: Book Page Document Number Security Instrument Riders: AR Condo 📃 1t Place Recorded: Bi-Weekly Balloon Other: Place Re-Recorded: FHA/VA Riders & Allonges: ARA GPA GEA nment 3 Other: Other: Assignor Full Legal Name: \$ VA Mtg/DT Riders: Massumption Assignee Full Legal Name: * Document Dated: / / Date Recorded: / / at: : · M Existing Liens and/or Assumption, Modification, Consolidation Recorded At/In: Book Page Document Number Document: O Assumption \bigcirc Place Recorded: Consolidation, Extension & Modified Consolidation, Extension & Place Re-Recorded: Document Dated: / / Date Re Recorded At/In: Book

Recording data for Assignments would be imported to the 1st Loan – Assignments.

Recording other document types using "N/A"

ProForm doesn't have recording data fields for document types like powers of attorney, leases, and UCC Financing Statements. For these document types, the user may select **N/A** in the ProForm document type list. When **N/A** is selected, only the recorded document and recording fees will be returned for importing into the Order

County Requested Information

Some counties require data to be sent with a document for the document to be recorded. Based on the County document type selected (see *County Document Type,* above), Simplifile communicates with SoftPro 360 to tell the user what data from an Order is required.

Party Information: Grantors and Grantees

A grantor and grantee window opens when the county requires the names and addresses of the parties to a document. All Buyer, Seller and Lender contacts from the Order will be listed as Grantors and Grantees. If the ProForm document type selected is a Deed, then by default, the Seller contacts will be checked as Grantors and the Buyer contacts will be checked as Grantees.

🥯 eReco	🥶 eRecording - 2017120093 🛛 💌				
Curre Dee	nt Document ed.pdf		simplifile.		
	Add Grantor		Add Grantee		
	Bob Buyer		Bob Buyer		
	Betty Buyer		Betty Buyer		
	Seller Organization, I		Seller Organization, I		
	Bank of Trust		Bank of Trust		
	Ficus Bank		Ficus Bank		
	SoftPro Bank		SoftPro Bank		
•	Back Next Cancel				

If the ProForm document type selected is a Security Instrument, then by default, the Borrower/Buyer contacts will be checked as Grantors and the Lender contact associated with that Security Instrument will be selected as the Grantee.

🥹 eRecording - 2017120093			
Current Document	mplifile		
Mortgage.pdf D1.	mpiijne.		
Select from the available county documen	t types.		
Inoligage	eRecording - 201712	0093	
Choose the corresponding ProForm docur recording information to your order.	Current Document		aim alifila
Security Instrument 1 - Bank of Trust (\$150	Mortgage.pdf		simplijile.
	Add Gi	antor	Add Grantee
	Bob Buyer		Bob Buyer
Back	Next Betty Buyer		Betty Buyer
	Seller Organiz	ation, I	Seller Organization, I
	Bank of Trust		Bank of Trust
	Ficus Bank		Ficus Bank
	SoftPro Bank		SoftPro Bank
	۰ ۱۱۱		•

For **Releases**, **Assignments** and **N/A**, no contacts will be checked by default so that the user can select the correct contacts to send to the county.

Adding Grantors and Grantees

If a Grantor or Grantee is entered in the Order as a Buyer, Seller or Lender, the contact will not be displayed in the grids. Click on the **Add Grantor** or **Add Grantee** buttons opens the **Add Grantor** or **Add Grantee** windows. By default, these windows open with the **Individual** party type selected.

🛀 Add Grantor 💽	😔 Add Grantor
Individual Organization	🗇 Individual 💿 Organization
First Name 🗶	Name *
Middle Name:	Middle Name:
Last Name:	Last Name:
Suffix:	Suffix:
Street Address:	Street Address:
City/State/Zip:	City/State/Zip:
Save Cancel	Save Cancel

Only a first name or business name is required by SoftPro 360 to add a contact to the grid. Depending on the county, a full name or address may be required to submit a document for recording.

Grantor and Grantee name and address details

Clicking on a contact name opens the contact details window, displaying the first name, middle name, last name and suffix for Individual contacts and the business name for Organization contacts, as well as the contact's current address from the Order.

🥶 eRec	cording - 20171200	93	<u> </u>
Curr	ent Document		simplifile
Mo	ortgage.pdf		Simplific.
	Add Gran	tor	Add Grantee
	Bob Buyer		Bob Buyer
	Betty Buyer	🥶 Bob Buyer	—
	Seller Organizatio	💊 🔘 Individual 🖉) Organization
	Bank of Trust	First Name:	Bob
	Ficus Bank	Middle Name:	
	SoftPro Bank	Last Name:	Buyer
	I	Suffix:	
•	III	Street Address:	123 Any St
		City/State/Zip:	Raleigh NC 27609
py from I	itle Legal		Close

The data in the details window will be sent to Simplifile if required for recording.

These fields are not editable. If the user wants to add or change a name or address, the user can either (1) return to the Order to edit these fields as necessary, (2) use the **Add Grantor** or **Add Grantee** buttons to add a party to the grid with the added or changed data, or (3) proceed to the next screen and make any changes when reviewing the document on the Simplifile website.

Requested Information

Some counties require additional information to be sent with a document for recording.¹ Based on the selected county and the selected county document type, Simplifile will communicate with SoftPro 360 and SoftPro 360 will display the additional required information in a grid.

¹ A list of the fields supported by SoftPro 360 for Simplifile is in Appendix A.

For example, this grid is displayed for a Bargain and S	Sale Deed in Pierce County, WA:
---	---------------------------------

🥯 eRecording - 2017120093		×		
Select a County	6	simplifile		
Select a county for e-recor	rding.	simpingite.		
(🥯 eRecording - 2017120093		x	
Please select a county yo	Current Document	aimplifil		
Pierce County (WA)	Deed.pdf	simpiijii	le.	
	•	eRecording - 2017120093		X
Please select a cost cent	Select from the available of		aire ali	61
1st Advantage Abstract I	Bargain and Sale Deed		SIMPII	
	Choose the corresponding		10	′
Add counties or update a	recording information to y	Name	Value	_
Add counties of update at	Deed 1	Property Address:	123 Any St.	-
		Personal Property Amount:	800.00	
		Property City:	Tacoma	
		Execution Date:	10/04/2017	
		Gross Selling Price:	300,000.00	=
		Legal Descriptions:	Prelim legal	-
		Property Zip Code:	98412	
		Property State:	WA 👻	
		Personal Property Description:	Household appliances and lighting fixtures	
		Parcel Id:	785-985529-26	-
	-			
			Back Next	Cancel

For a Deed in Orange County, FL, this grid is displayed:

🥹 eRecording - 2017120094	4		
Select a County Select a county for e-re	cording.	simplifile.	
(🥹 eRecording - 2017:	120094	
Please select a county	Current Document	simplifile	
Orange County (FL)	Deed.pdf	simplifie.	
		eRecording - 2017120094	—
Please select a cost ce	Select from the a		simplifile.
1st Advantage Abstrac	Choose the porre		pj
	recording inform	Name Value	
Add counties or update	Deed 1	Deed Consideration: 250,000.00	
		Services (Contraction) (Contraction)	

Some counties do not require any additional information to record certain county document types. In that case, no grid will open, and the user will be taken to the next screen in the Simplifile recording wizard.

Adding Helper Documents

If a county requires an additional document to be recorded with the main document, a window will open with the name of the required supporting document. A combo box to the right opens to a list of options for browsing to or attaching the supporting document to the recording package.

🥹 eRecording - 2017120093	—
Current Document	simplifile
Deed.pdf	simping.
The county requires additional do	ocuments for the document type you selected:
REETA	
	Browse Attachment ReadyDoc
	Back Next Cancel

When a supporting document has been successfully added, the file name will appear with a green checkmark.



Clicking Next will return the user to the Document Delivery screen.

Submitting Document Package

After the user has added the documents to the package, selecting **Next** on the **Document Delivery** screen opens the **Ready to Submit** screen. This screen gives the user the option to receive an email notification when the recorded documents are returned to the Order. The user also has a choice to submit the document package to Simplifile for reviewing on its websites *before* it is sent to the county or to send it directly to the county without review.

🥶 eRecording - 2017120002	•
Ready to Submit	simplifilo
The document package is ready for submission.	simpiljne.
If you would like to receive email notification when you READY, it can be sent to:	r recorded package is
lizanne.healey-smith@softprocorp.com	
I understand that I am responsible for the information I MAY CHARGE A FEE FOR REJECTED SUBMISSIONS go through the document review process. Review the document package on Simplifile's webs Submit this document package to the county record completing the review process.	submit to the county. The county S. Simplifile strongly suggests you ite. Jer without
Back	Submit Cancel

Email Notification

The user has the option to have get an email notification when the recorded package has been returned to the Order and the transaction status in the 360 Queue has changed from **In Progress** to **Ready.** By default, the email address that the user enters to sign into SoftPro 360 is entered for the notice. Also, by default, this option is unchecked. Checking the checkbox, activates the email notification option and allows the user to change the email address for notification.

If you would like to receive email notification when your recorded package is READY, it can be sent to:						
sue jones@softprocorp.com	- 1					

The changed email address is saved so that it will appear in this field the next time the user opens the Simplifile service in SoftPro 360.

The email will message will be similar to this:



Reviewing Package in Simplifile

By default, the option to review the package on Simplifile's website before submitting it to the county for recorded is selected. Selecting **Submit** will open the user's default browser to Simplifile with the package available to be reviewed before submitting for recording.

Sending Package Directly to County

This option is available only when the user has entered data into all the required fields, if any, for all documents in the package. If any field is empty, this option will be disabled.

🥹 eRecording - 2017120002		
		eRecording - 2017120002
Name Property Street Address:	Value 987 New St. Tacoma	The document package is ready for submission.
Property Address: Personal Property Amount: Property City;	987 New St.	If you would like to receive email notification when your recorded package is READY, it can be sent to:
Execution Date: Gross Selling Price: Legal Descriptions:	12/07/2017 250,000.00 Tax Parcel #7895-25-9 County of Pierce	I understand that I am responsible for the information I submit to the county. The cou MAY CHARGE A FEE FOR REJECTED SUBMISSIONS. Simplifile strongly suggests go through the document review process.
Property Zip Code: Property State:	98765 WA	 Review the document package on Simplifile's website. Submit this document package to the county recorder without completing the review process.
	Back	This option is not available either because of the county you selected or the answers to previous questions.

Please note that this option should be used very carefully. It is intended for advanced users who know the county requirements and whether all those requirements have been met in the recording package,

and no further data would need to be added on the Simplifile website for the package to be "Ready" to Submit.

When a package has been successfully sent without review, a message will let be displayed. The user selects **Finish** to close the service.

🥶 eRecording - 2017120002	—
Package Delivery Complete The document package was successfully delivered.	simplifile.
The document package will be sent to the county recor click the 'Finish' button to close.	der without further review. Please
Back	Finish Cancel

Completing Packages in Simplifile

Completing Required Information

Submitting a package with the review option opens the user's default web browser to the Simplifile website with the documents attached and ready for review.

Pacl	kage De	tails			Select Select at Organization J					
Back Packag 201712	e Name 20002	Order # is Package Na	me			5 minutes	- 1 he	our estima	Save Recipient Pierce County, WA ated recording time	
Packag	e Created Und	er Cost cent in SoftPro	ter selected o 360)					Package Status Draft	
ISL AU	Clic	cking on the file ne opens the iew screen.				Draft status indicates that data is required before package can		Down	hload Print Discard	
	Name	Туре	Pages	Fees	Status	be submitted.	ID	History	Download/Print	
↑	Deed.pdf	Bargain and Sale Deed	1	\$74.00	Draft	Thu 12/14/17 3:01 PM EST	ID	History	* 🕀	
+	Mortgage.pdf	Mortgage	1	\$75.00	Draft	Thu 12/14/17 3:01 PM EST	ID	History	≛ ⊖	
	- Choose a De	ocument Type -		Add Docu	ıment					
Recordi Submis	ing Fees: \$149 sion Fee: \$10	9.00 from <i>Invoice</i> 0.00 from <i>Invoice</i>								

If a document has a **Draft** status, the user needs to open the document by clicking on the document's file name. Required data is marked with a red asterisk.

Submitting Package for Recording

Once the required data has been entered the document status will turn to **Ready** and the **Submit** button is displayed.

Pac	kage De	tails				Select Select at Orga	inizatio	٦J	~	Sign Out
Back	t l								Save	
Packag	e Name								Recipient	
201712	20002					5 min	utes - 1	hour estin	Pierce County, WA nated recording time	
									∧ Package Status	
									Ready	
Packag	e Created Unde	er								
1st Ad	vantage Abstract	LLC								
								Download	Print Discard Submit	
	Name	Туре	Pages	Fees	Status	Date	ID	History	Download/Print	
↑ □	Deed.pdf	Bargain and Sale Deed	1	\$74.00	Ready	Thu 12/14/17 3:01 PM EST	ID	History	* 0	
+	Mortgage.pdf	Mortgage	1	\$75.00	Ready	Thu 12/14/17 3:01 PM EST	ID	History	* 0	
	- Choose a Do	ocument Type -		d Docume	ent					
Record	ing Fees: \$149	.00 from <i>Invoice</i>								
Submis	sion Fee: \$10	0.00 from <i>Invoice</i>								

Clicking the **Submit** button sends the package to the county for recording.

Managing Packages after Submission

Importing a Recorded Package

Opening a "Ready" Transaction

When a package has been has been successfully recorded, the transaction status will change to **Ready.**

36	0 Queue						
	🖉 Next St	tep 回 🖂	Views:	Active Order		🖥 🐻 🋗 🛛 Filter: 🛛	
Г		Provider Service		Status	Linked Order	Linked Profile	
	\$	Simplifile	eRecordin	Ready	2017120004	\\Default	

Clicking on the **Next Step** icon or double clicking on the transaction will open the Review screen.

6							8						
🛃 Select All 📑 Sel	ect Nor	ne 🛛 🧱 Field Codes 🗍 Lin	nked To: 2017120004		-								
Groups	🕑 D	ata											
Al	V	Name	Current Value	Ne	w Value								
Recording Fee		Recording Fee		Re	cording Fee	10.00Tr	2	ш					
2000.pu	~	Recorded Date		12/	14/2017 4:	34:18 PM							
	V	Book Number						ш					
	v	Book Number Label	Book	Boo	k Number		D						
	V	Page Number						ш					
	V	Page Number Label	Page	Pag	ge Number		1	-					
Documents								1					
View Cop	y File	Name			File Size	Transferre	ed	1					
	Dee	d.pdf			1786	100%							
	Tran	nsactionReport.pdf			10274	100%							
	_		6									-	×
	STD	or ENT	로 Select All 📑 Sel	ect No	ne 🛛 🗰 F	eld Codes	Link	ed To	D: 2017110086	Ŧ			
	_		Groups	0	Data		-						
								~		N			
			Recording Fee		Name	- 5		Curre	nt value	New Value			
	-		Deed.pdf		Transfor	ig ree T-w))		2000.00			=
				Submission Eas			0		2800.00		- <u>1</u>		
					Recorde	d Date		, 		12/15/2017 8	52·49 AM		
					Book Nu	mber				12 10 2017 0			
					Book Nu	mber Label				Book Number			÷
			Documents					_					=
			View Con	v Fil	e Name			_		File Size	Transfem	ed	=
				De	ed.pdf					1786	100%		
				Tra	nsactionRe	port.pdf				10277	100%		
							-		_				
								Se	lect				
										Accep	t Cl	ose	
					-	-					-		_

Working in the Review Screen

The **Groups** section of the screen displays the data tree. Selecting on a branch of the tree will display only the data relevant to that branch. The **Data** section of the screen displays a description of each data item, the **Current Value** if on exists in the Order, and the **New Value** sent by Simplfile.

Selecting the **Field Codes** button opens a column in the **Data** section that displays the field codes for the fields into which the **New Values** will be imported.

•									
로 Select All 🖹 Sel	Select All 式 Select None Field Codes Linked To: 2017120004								
Groups	🕑 Da	ta							
All	V	Name	Current Value	Field Code	New Value		-		
Recording Fee Deed.pdf	~	Recorded Date		DEEDRECO	12/14/2017 4:3				
	~	Book Number		DEEDRWBK			_		
		Book Number La	Book	DEEDLBBK	Book Number		=		
	1	Page Number		DEEDRWPG					
	v	Page Number La	Page	DEEDLBPG	Page Number				
	V	Instrument Number		DEEDRWDO	3287198314		-		

Recording fees are sent to the Notes section of the Order.

2) File No., Settlement Dates,	Notes (2017120004	.PFD)
Firm File Number:	2017120004	
Transaction Type:	Purchase	Refinance Equity
Cash Sale:	Construction:	Reverse Mortgage:
Settlement Date:	//	ProScheduler
lr	nclude Saturday in R	escission Period:
Disbursement Date:	//	Proration Date: / /
Title Examiner:		Closer:
Escrower:		Escrower Title:
Order Notes:	Recording Fee:10.0 Transfer Tax:1750.0 Submission Fee:5.0	0 0 0 0 0 0 0 0 0 0 0 0

No	tes (1)			Select			
ł				Select			
	8	C	Created	Last Modified		Note	
۲	▶ 🇞 12/15/2017 09:07 AM			Lizanne Healey-Smith		Initial Recording Fee: \$10.00 Initial Transfer Tax: \$2800.00 Initial Submission Fee: \$5.00	

The **Edit** icon to the right of each line allows the user to open the **New Value** and edit it before importing it into the Order.

5				X		1
😴 Select All 📑 Sele	ect None 🛛 🛄 Field Cod	es Linked To: 20171200	04 👻			
Groups	🕝 Data					
All	Name	Current Value	New Value	*		
Deed.pdf	Recorded Date		12/14/2017 4:34:18 PM			
	Book Number					
	Book Number Lab	el Book	Book Number	<u>></u> =		
	Page Number					
	Page Edit New V	alue : Book Number Label				×
	Append	🔄 🍠 Revert 🛛 🏂 Upperd	ase 👆 Lowercase Aa Prop	ercase 📲	🔳 Trim 🗎 Copy 🐰 Cut	🖺 Paste
Documents	Book Numbe	r				A
View Copy	/ File Name					
	Deed.pdf					
	Transactio					

USER TIP: If you are unsure whether to accept the data or not, you can use the **Edit** feature and select **Append** in the **Edit New Value** screen. This will add the **Current Value** to the **New Value**. As long as the field has sufficient space to hold both the **Current Value** and the **New Value**, after clicking **Accept**, they will both be in the field so that you can decide on which data to keep when you are back in the Order.

The **Documents** section of the Review screen displays the documents that may be attached to the Order's **Attachments** or **SPImage.** The **View** icon allows the user to open the document prior to importing it into the Order. The **Copy** icon allows the user to copy and paste an image of the document into another document.

By default all documents and data are selected to be imported into the Order. Any item unchecked will not be imported and will not be available for importing after the user clicks **Accept**. After the user has reviewed the data and documents and made any changes, clicking the **Accept** button sends the documents to **Attachments** or **SPImage** and the data to the appropriate fields in the Order. Once the importing is done, the **Review** screen closes and the transaction status in the 360 Queue changes to **Completed**.

360 Queue											
🗄 💿 Next Step 💿 🖂 📄 Views: Active Order 🛛 🚽 🔯 🔜 🏙 Filter:											
	Provider	Service	Status	Linked Order	Linked Profile						
\$	Simplifile	eRecordin	Completed	2017120004	\\Default						

The user can also select the **Close** button to close out of the Review screen without importing the data and documents the order. The transaction status will remain as **Ready** so that the user can open it later to review and import the data and documents.

Canceling a Package Submitted to Simplifile

Once and order has been submitted to Simplifile, it can be canceled in the 360 Queue **only if** the package is in **Draft** status on the Simplifile website and was not sent to the county for recording, or if the transaction has been rejected and has an **Updated** status. A **Ready** transaction cannot be canceled.

To cancel a package, select the Simplifile transaction and the **Void** icon in the 360 Queue toolbar.



This opens the **Cancel** screen. Checking the **I Agree** checkbox, enables the **Next** button.

🥹 eRecording - 2017110086	
Cancel	simplifile.
Canceling this transaction will remove Simplifile's website. Are you sure you	a the order from your 360 Queue and want to cancel this transaction?
	Back Next Cancel

Clicking on the **Next** button sends the cancelation request to Simplifile. When the cancelation submission is complete a window will open to let the user know that the recording package has been canceled. The user can select the **Finish** button to close the service.

In the 360 Queue, the transaction will have a **Canceled** status and cannot be opened again.

Queue									
🛇 Next Step 👄 🖂 🗐 Views: Active Order 🔹									
Provider	Service	Status	Linked Order	L					
Simplifile	eRecording (New)	Status Canceled	Linked Order 2017110086	D					

Handling Rejected Packages

If a package has been rejected by the county, Simplifile will send a notification to SoftPro 360. In the 360 Queue the transaction status will be **Updated.**

360 Queue								
📀 Next Step 🤤 🖂 📋 Views: Active Order 🔹 📩 📄 🔀 🛗 Filter:								
	Provider	Service	Status	Linked Order	Linked Profile			
e !	Simplifile	eRecordin	Updated	2017120004	\\Default			
1 of 1 result	ts at 4:04 PM							

The file name of the document rejected and the reason for rejection will be in the transaction log. Clicking on the Transaction Log icon opens the transaction log. Hovering over the message will display the full rejection explanation.

Provider Senice Status Linked Order Linked Profile Image: Simplifile eRecord in Updated 2017120004 \\Default
Simplifile eRecolutin Updated 2017120004 \Default
Created On Created By Message
12/14/2017 4:00:45 PM lizanne.healey-smith@softprocorp.com Operation Submit requested
1 12/14/2017 4:02:38 PM simplifileservice Operation Remit requested
12/14/2017 4:02:38 PM Simplifile REJECTED 'Deed.pdf': Randomly s
REJECTED 'D

Clicking on the **Next Step** icon or double-clicking on the transaction in the 360 Queue will open the Simplifile service.

360 Queue								
🛇 Next Step 🤤 🖂 🗐 Views: Active Order 🔹 🚖 🎲 🐻 🛗 Filter:								
	Provider	Service	Status	Linked Order	Linked Profile			
e ?	Simplifile	eRecordin	Updated	2017120004	\\Default			
Click Next Step or double-click on the transaction to open.								
1 of 1 result	ts at 4:04 PM							

If there was an issue with the document, the user can **Delete** the document from the **Document Delivery** screen and attach the corrected document. If there was an issue with indexing, the user can keep the attached document and click the **Modify** button to open information screens and review the corrections to besent with the document package.

Once in the Simplifile website, the user can open the document to address any required data issues and submit the package again for recording. The transaction status in the 360 Queue will return to **In Progress**.

360 Queu	360 Queue										
🗄 🔘 Nex	🛇 Next Step \ominus 🖂 🗐 Views: Active Order 🔹 🔶 📝 😨 🚓 🏥 Filter: All Providers 🔍 🖉 🏢 🖉										
		_				<u></u>					
	Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On	Completed On	Description	Transaction Number	-
\$	Simplifile	eRecordin	In Progress	2017120004	\\Default	Lizanne Heal	12/14/2017 4:00 PM			410060-20-171214-016701	

Additional Features for Select Users

CDF Page 2: Actual Charges

For all ProForm users, recording charges and fees are sent to the **Order Notes** when imported with the recorded documents and data (see *Working in the Review Screen,* above). For Select users (version 4.2.2 and higher) these fees and charges are also sent to the **Actual Charges** dialog in CDF Section E and HUD Section 1200.

	<click< th=""><th>ere to add a row></th><th>E. Cha</th><th>Taxes and Other Ge arges for Line 01</th><th>ove</th><th>ernment F</th><th>ees</th><th></th><th></th><th></th><th></th><th></th><th></th></click<>	ere to add a row>	E. Cha	Taxes and Other Ge arges for Line 01	ove	ernment F	ees						
C.	Service	s Borrower Did Shop For	-	_									
		Description		Description			Re	То	,	Borrower-Paid At Closing	Borrow Before	er-Paid Closing	Seller-Pa At Closi
•	<u>01</u>	Title - Lender's Title Insurance	▶ 1	Recording Fees				G		\$10.00			
	02					Actual Charge	s						×
	03					-							
	05						ſ	Initi	al	Re-Recor	rded	Bill Co	ode
	<u>06</u>		Fee	s Details Payors Payees		Recording fe	es:		\$10.00			REC	•
	<u>07</u>			Fee Schedule Type	Pa	Transfer tax	es:		\$2,800.00			RTX	-
	<u>08</u>		•	Recording		Recording s	ervice charges:		\$5.00			MIS	-
D.	TOTAL	LOAN COSTS (Borrower-Paic			1	Total char	ng service charges	are not eligi	ble for reim	bursement (omit	from tota	ls)	
	Loan Cor	the Subtotale ($\Delta + B + C$)			1	Total actu	al chames:			2 815 00			
Ot	her Co	ists				Overage (+)/Shortage (-)			-\$5.00			
E.	Taxes a	nd Other Government Fees				Reconc	le complete						
١	<u>01</u> 02	Recording Fees										Clos	se
F	<click h<="" td=""><td>ere to add a row></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></click>	ere to add a row>											
	riopula												

The fees and charges for the first recorded package in the Order are sent to the **Initial** column. The fees and charges for additional recorded packages are sent to the **Re-Recorded** column.

Actual Charges			×
	le#ial	Po Poperdad	Pill Codo
Recording fees:	\$10.00	\$10.00	REC -
Transfer taxes:	\$2,800.00	\$825.00	RTX -
Recording service charges:	\$5.00	\$5.00	MIS 👻
🔲 Pasardina sanjan aharasa	ne net elizible far minhun	ement (emit frem tetal	
Hecoroling service charges	are not eligible for reimburs	sement (omit from total	5)
Total charged:	\$2,5	B10.00	
Total actual charges:	\$3.0	655.00	
Overage (+)/Shortage (-):	-\$1	845.00	
Reconcile complete			
			Class
			Guse

If more than one additional package has been recorded, the **Re-Recorded** column will display the cumulative total of the additional fees and charges.

Actual Charges			—
	Initial	Re-Recorded	Bill Code
Recording fees:	\$10.00	\$20.00	REC 💌
Transfer taxes:	\$2,800.00	\$825.00	RTX 💌
Recording service charges:	\$5.00	\$10.00	MIS
Recording service charges Total charged:	are not eligible for reimb	ursement (omit from total	s)
Total actual charges:	\$3	3.670.00	
Overage (+)/Shortage (-):		-\$15.00	
Reconcile complete			Close

The cumulative total for the fees and charges for subsequent recorded packages will also be sent to the **Order Notes** for each recorded package.

N	of	te	5 (3)

+ - ₽							
	8	C ^a	Created	Last Modified	Note		
Þ	80		12/15/2017 10:36 AM	Lizanne Healey-Smith	Re-Recorded Recording Fee: \$20.00 Re-Recorded Transfer Tax: \$825.00 Re-Recorded Submission Fee: \$10.00		
	2		12/15/2017 10:00 AM	Lizanne Healey-Smith	Re-Recorded Recording Fee: \$10.00 Re-Recorded Transfer Tax: \$825.00 Re-Recorded Submission Fee: \$5.00		
	2		12/15/2017 09:07 AM	Lizanne Healey-Smith	Initial Recording Fee: \$10.00 Initial Transfer Tax: \$2800.00 Initial Submission Fee: \$5.00		

These notes reflect the fees for the third recording package (the second Re-Recorded package to be a Recording fee of \$10, Transfer Tax of \$0 and a Submission Fee of \$5.

For more information on Actual Charges, click use F1 Help when in the Actual Charges dialog.

Automation

Workflow Automation is available to Select users on Select version 4.3.2 (4.2.41028.5) or higher. Automation for Simplifile transactions can be enabled to submit a new recording package and handle packages returned to 360. Only users with **SPAdmin** access can create an automation process. Automation processes are created is **SPAdmin** by clicking on the **Processes** subfolder under **Automation** and clicking on **New Process Setup** in the **Processes** ribbon, or right clicking on the **Processes** subfolder and clicking on **New Processes**.²



There are multiple automation processes that can be set up for Simplifile. One example is to set up a process to accept recorded packages. In the **Automation Process Wizard**, for **When**, select (1) **360 transaction is updated** and (2) the **specific** link to select **Simplifile – eRecording**.



² A full explanation of the **Automation** process is beyond the scope of this User Guide. For more information, access the **Processes** subfolder in the **Management Console** of **SPAdmin**, and click the **F1** key to open the online **F1 Help** guide for **Select Automation**.

For If, check 360 transaction status is and a specific value of Ready.

Automation Process Wizard	Image: State Sta
O	Y F
When	If Then
And if these conditions are met:	If
360 transaction field is specific value	360 transaction status is
360 transaction provider reference name contains	New
360 transaction provider reference number contains	V Ready
360 transaction sent to contains specific value	Completed
9 360 transaction status is specific value	Rejected
9 360 transaction status is specific value	Canceled
9 360 transaction status for the specific value	Error
9 360 transaction status is specific value	InProgress
9 Order has the following criteria	Updated
Here's your rule so far:	Accepted
When a <u>Simplifie - effection (New)</u> 360 transaction is	Suspended
and 360 transaction status is <u>epecific value</u>	Sending
	Next > Cancel

For Then, check Perform a specific 360 action and a Service Action of Simplifile Accept, Accept Data of Overwrite Data, and Accept Documents as Accept Documents.



Click **Finish** on the **Automation Process Wizard** and enter a **Name** for the process in the next screen. Checking the **Enable this process** checkbox will enable the process for In Progress and new recording transactions.