

SkySlope New Orders User Guide

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History

Date	Version	Details
December, 2021		New release

Introduction

SkySlope is a web-based application used by Real Estate agents to send new orders to Settlement Agents to open Escrow for real estate transactions. SkySlope currently sends an email with the property address, buyer and seller names, buyer and seller real estate agent names and projected closing date to the settlement agent. The integration between SkySlope and SoftPro 360 will replace email communication and provide users the ability to seamlessly place orders for opening Escrow. The Settlement Agent will receive/accept the request and open an order in SoftPro.

360 Queue View – New Orders

For instructions on setting up new Queue Views, please refer to the SoftPro 360 – User Guide on F1 help.

SkySlope New Orders 360 views should be set up as follows:

•	Provider	Equals	SkySlope
•	Service	Equals	Open Escrow Order
•	Sent To	Equals	<users address="" e-mail=""></users>

1	Start Page 🖉 Query Editor: SkySlope JW 🗙		4 Þ
R	un Save As 🗙 Delete 🐈 Public View		
	Property	Operator	Value
1	Provider V	Equals	SkySlope
	Service	Equals	Open Escrow Order
	Sent To	Equals	joseph.white@softprocorp.com
•			

Accepting the 360 Transaction

In the 360 queue, transactions awaiting acceptance will show with a status of **NEW**.

Queue	_									÷ ×
🕑 Next St	ep 🖯 🖂 🖬	Views: SkySlope JW	* 🚖	🎅 🔂 🏙 Filter: A	Il Providers	- 2 1	I 🗇			
	Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On	Completed On	Description	
	SkySlope	Open Escrow Order	New			System Administr	12/6/2021 10:45 AM		1487 Wilson Dr, Newport Beach, Orange, CA, 92660	
<										>
1 of 1 resul	ts at 1:32 PM									
Ca My Work	Items 🖉 Search	Results 📸 Errors and Warnings	Oueue							
2010,000				J						

Click the Next Step button and the New Order window will appear.

Choose a **prefix** or **suffix** (if required), a **trust account** (if required) and the **settlement type**. Apply a template (if required), then click the **OK** button.

Workflow Live	New Order X	
 Select All	Prefix: I Suffix: I Order number: 2021120027 Inst account: <	×
Al V Properties SettlementAgents Other Notes V V V V V V V V	ettlement type: O Closing Disclosure O Commercial Image: HUD-1 Orders/Templates to copy	kue Andrew Andre
Documents Vew Copy File N NHD F	Order/Template	s Sze (KB) Transfered 100%
smartView : <u>None</u>	OK Cancel Help	Reject Cancel

The newly created order is now linked to the 360 transaction.

Groups	🕝 Data				
Al	Name	Current Value	New Value	-	1
Properties	Property[1]/Address1		1487 Wilson Dr	1	
Other	Property[1]/City		Newport Beach		
Notes	Property[1]/State		CA	2	
	Property[1]/Zip		92660	2	
	Property[1]/County		Drange		
	Residential				
View Copy	File Name		File Size (KB) Transferr	ed	
	NHD Report		0 100%		
	er no i report				

To link an existing order to the 360 transaction, click **Cancel** on the **New Order** screen

Live	New Order X	
 Select All Select None Select None 	Prefix: V Suffix: V Order number: 202202056	×
Al Properties Settlement Agents Notes	Truit account: Settement type: O Cosing Disclosure Commercial I UP-1 Orders/Templates to copy	
Verv Copy File N Nerv Copy File N Nerv Copy File N Novic N Novic N Novic N Novic	Order/Template + Size (KB) Transferred 100% 100%	
smartView : <u>None</u>	OK Cancel Help	

🛃 Select All 🗮 Select None 📑 Field Codes 🛛 🍼 New Ord ler 🖉 Order Search Linked To: Data 2 Current Valu New Valu Property[1]/Address 23 sweet sha 2 Σ Σ Σ Property[1]/Address2 add street 2 Property[1]/City Georgia Property[1]/State FL ø 32233 Property[1]/Zip operty[1]/Blo Block2 Document \square View Copy File Na File Size (KB) Transfer アアア 202 593 593 Invoice Invoice-Copy(1) Invoice2 Cancel



On the Review Screen, click Order Search

Enter the order number to be linked to the transaction and click **Search**

Click to **highlight** the correct order in the **Search Results**, then click **OK**. The OK button will be greyed out until an order is highlighted

The order number will now show in the **Linked To** box in the upper right corner of the Review screen

2022010049				CONTRACTOR DUR			Deller		0.1.0
ζ								OK	Canoel
٢						_		ОК	Cancel
<	122010049					_		OK	Cancel
<	122010049 Select N	one 🔝	Field Codes 🥑	New Order 🥏	Order Sear	ch Link	ed To: 202	ок 2010049	Cancel
Review-20 Select All Groups	122010049 Select N	one 🛄	Field Codes 휫	New Order 🥏	Order Sear	ch Link	ed To: 202	ок 2010049	Cancel
 Review-20 Review-20 Select All Groups All Depending 	122010049 Select N	one Data	Field Codes 🥑	New Order 🥏	Order Sear	rch Link	ed To: 202	ок 2010049	Cancel
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<)22010049 ■ Select N IAgents	one Data Data V Nar V Prop V Prop V Prop V Prop	Field Codes 9 me enty(1)/Address1 enty(1)/Address2 enty(1)/Cay enty(1)/Sate enty(1)/2ate	New Order 🖉	Order Sear	ch Link 22 GG FI	ed To: 202 lew Value i sweet shac id street 2 sorgia	ок	Cano
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Review-20 Review-20 SelectAll Groups All Groups Notes Docume Vew Vew Vew Vew	122010049 Select N IAgents Copy F Copy F	one Data	Field Codes 🥑 ne entry(1)/Address1 entry(1)/Address2 entry(1)/2dd	New Order P Current V 123 Main Datas TX 75001	Order Sear	ch Link N 23 ec G G FL 33 B	ed To: 202 lew Value I sweet shac Id street 2 sorgia 	ок 2010049	Cancel
Review-20 Review-20 SelectAll Groups Al Properties Settlement Other Notes Vew Vew Vew Vew Vew Vew Vew Vew Vew Ve	IAgents	one Data Data Data Prop Prop Prop Prop Prop Prop Prop Prop	Field Codes 9 me me sety[1]/Address1 sety[1]/Address2 sety[1]/2a sety[1]/2a sety[1]/2a	New Order P Current V 123 Man 1 Dalas TX 75001	Order Sear	ch Link 22 40 GG FI 33 Bi	ed To: 202 lew Value 3 sweet shad id street 2 sook2 223 sook2 File Size 202 593	ок	Cancel 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2

If the order is to be accepted, click **ACCEPT** to import the data into the new order.

Verify the escrow number and escrow officer is correct. This information will be sent back to SkySlope to inform them that the order has been accepted. Add notes (if necessary) and click **OK**.

The data has now been imported into the new order. Be sure to save the new order.



The 360 transaction status is now updated to COMPLETED. The transaction is complete.

Queue		- 1 (1997)			P							+ X
O Next	Step 🕲 📖	Views: SkySlope	-		Filter: All Providers	- 2						
	Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On v	Completed On	Sent To	Description	Transaction Number	
	SkySlope	Open Escrow Order	Completed	2021120107	Default	System Administr	12/13/2021 12:43 AM	12/13/2021 12:48	namithaPerson1@fnf.com	23 sweet shade, add street 2, Georgia, Duval, FL, 32	410060-60-211213-358178	
1 of 1 re	sults at 8:31 AM	1	Q									
My My	Work Items 🔏	Errors and Warnings 🚭 Qu	eue									

Rejecting a SkySlope Order

If the order must be rejected, click REJECT.

The **Reject Order** window appears. The rejection reason is required, and the YES button will be greyed out until a reason is entered. Once the reason is entered, click **YES** and the rejection reason will be sent back to SkySlope. Information from SkySlope will not be imported into the order.

= 0	oups		🕑 Di	📀 Data									
AI				Name	Ne	w Value			1				
- Pro	perties tlementA	pents	Property[1]/Address1		123 Main Street	23	sweet shade		2	1			
- Other - Notes			Property[1]/Address2		add	street 2							
			Property[1]/City	Dallas	Geo	orgia		2					
				Property[1]/State	TX	FL			2				
			Property[1]/Zip	75001	32233								
			Property[1]/Block Block2		sk2								
Ø	View	Сору	File Na Invoice	me			File Size (KB) 202	Transferrer 100%	d				
	P		Invoice				202	100%					
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\square	7		Invoice	2			593	100%					

Groups	🕑 Di	ata						
All		Name	Current Value		New Value			
- SettlementAgents		Propertv[11/Address1		1487 W	llson Dr		2	
- Other		SoftPro 360 - Reject Order		×	Beach			
- Notes								
		Are you sure you want to	Reject? Enter reason below	*			1	
				_			2	
		I			ial		ø	~
Documents								
View Copy	File N				Size (KB)	Transferre	d	٦
	NHD I					100%		
	-				-			П
			Yes No					

The 360 transaction status is updated to REJECTED

Queue													± ×
© Next S	tep \ominus 🖂 🛛	Views: SkySlope	- 1	Filter	: All Providers	- 2	II 🗇 👘						
	Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On	Ŧ	Completed On	Sent To	Description	Transaction Number	
+	SkySlope	Open Escrow Order	Rejected			System Administr	12/7/2021 1:05 PM			joseph.white@softproco	1487 Wilson Dr, Newport Beach, Orange, CA, 92660	410060-60-211207-357480	
1 of 1 resu	ults at 8:35 AM												
🛃 My Wo	rk Items 🛛 🃸 Er	rors and Warnings 🚳 Queue											

Setting up Work Lists

To monitor SkySlope New Orders transaction for all users in an office, a Work List can be created.

For instructions on setting up Work Lists, please refer to the Work List – User Guide on F1 help.

On the Select Work List Source pop up, choose SoftPro 360 and click OK

Select Work List Source	×
Select a work list source from the list be	low.
Group Deposits Ledgers Order Tasks Orders Pfd Files Pro1099 Records Process Instances SoftPro 360 Transactions	
OK	ncel

The Work List should be set up as follows

	Provider	Equals
AND	Service	Equals
AND	Linked Order	Equals
AND	Sent To	Equals
OR	Sent To	Equals

Open Escrow Order <leave blank> <users e-mail address> <users e-mail address>

Start Page New Work List 1 [Edit]* ×

SkySlope

Repeat the OR statement as many times as needed to include all employees who will receive orders

📭 Run 🖷 📴 🔫 (E 🔚 🖓 Options Field And/Or Operator Value Provider = SkySlope Service Open Escrow Order And = And Linked Order = And Sent To = dani.schneider@ticortitle.com Or Sent To = kristi.burke@ticortitle.com pam.koep@ticortitle.com Or Sent To Click here to add a claus

When all desired employees have been added to the Work List, hold the SHIFT key and click to highlight all Sent To lines, then click the Group button to group them together

/	Start Page	New Work List 1 [Edit]* 🗙							
	Run 📑 📑 🔫 💽 🚍 Options								
	And/Or	Fiel Group Prov Group Clauses Serv	Operator =	Value SkySlope					
	And S And L		=	Open Escrow Order					
		Link.	-						
	And	Sent To		dani.schneider@ticortitle.com					
	Or	Sent To		kristi.burke@ticortitle.com					
Þ	Or	Sent To		pam,koep@ticortitle.com					
	Click hora to	add a dauga							

Next, click **Run** to initiate the query

-	Start Page New Work List 1 [Edit]* X									
	🕼 Run 📑 📴 🐄 (E).E. 🕼 Options									
	And/Or	Field	Operator	Value						
	Provider And Service		=	SkySlope						
			=	Open Escrow Order						
	And	Linked Order	=							
ſ	And	Sent To	=	dani.schneider@ticortitle.com						
	Or	Sent To	=	kristi.burke@ticortitle.com						
۶l	Or	Sent To	=	pam.koep@ticortitle.com						

The Work List Results will populate. Clicking **Options** icon in the transaction bar will display the organization of the columns and sort options.

Save Results 🖻 Refresh 🖄 🙀 Options								
Work Li	st Results: 4 items found (0 cur	rrently selected).						
Status	Sent To	Description	Transaction Number	Provider	Service			
New	kristi.burke@ticortitle.com	803 North Ave, Spokane, Spokane County, WA, 99207	910054-00-220131-999739	SkySlope	Open Escrow Order			
New	kristi.burke@ticortitle.com	2119 Sycamore St, Spokane, Spokane County, WA, 99217	910054-00-220131-999749	SkySlope	Open Escrow Order			
New	Dani.Schneider@ticortitle.com	1609 11th Ave, Puyallup, Pierce County, WA, 98371	910054-00-220125-686959	SkySlope	Open Escrow Order			
New	pam.koep@ticortitle.com	1016 Railroad Aly, 404, Spokane, Spokane County, WA, 99201	910054-00-220224-407074	SkySlope	Open Escrow Order			

NOTE: Orders can be worked directly from the Work List results by double clicking on the order

Clicking the **X** on the New Work List tab (or **CTRL + S**) will prompt the save function for the Work List.

	Start Page	New Work List 1 [Edit]* 🗙		
	Run 🗔 📑	a 🛶 🔚 🔚 🕞 Options 🛛 🔽	se	
	And/Or	Field	Operator	Value
		Provider	=	SkySlope
	And	Service	=	Open Escrow Order
	And	Sent To		kristi.burke@ticortitle.com
•	Or	Sent To		dani.schneider@ticortitle.com
	Click here to	o add a clause		

Click Yes on the Save Changes pop up



Name the Work List and choose to save it as My Work Lists or Shared Work Lists, then click OK



Work	Lists	ņ	×
	2 B:		
₩ ~ ¤	ork Lists My Work Lists		
×	Shared Work Lists Ledgers with Balance - By Bra Ledgers with Balance - By EC	anch	
	Eledgers with Balance - By Op	erati	ons

The Work List will now show as a saved Work List under the chosen category