SkySlope New Orders User Guide

December 2021

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History

Date	Version	Details
December, 2021		New release

Introduction

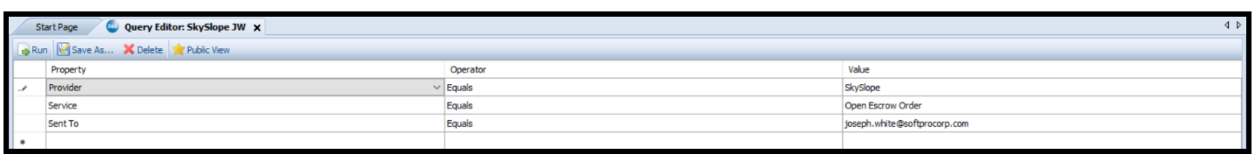
SkySlope is a web-based application used by Real Estate agents to send new orders to Settlement Agents to open Escrow for real estate transactions. SkySlope currently sends an email with the property address, buyer and seller names, buyer and seller real estate agent names and projected closing date 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.

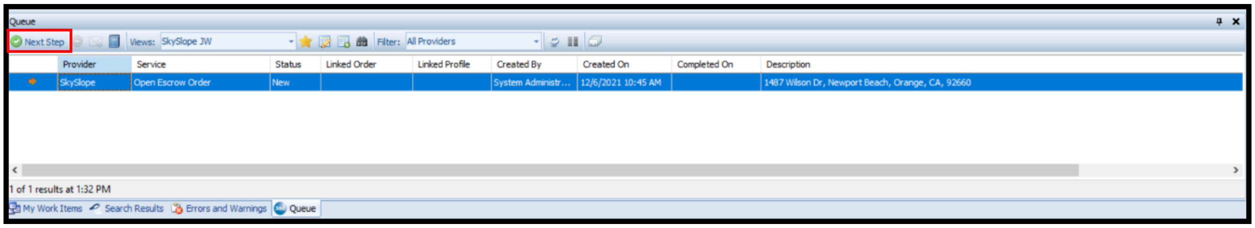
SkySlope New Orders 360 views should be set up as follows:

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



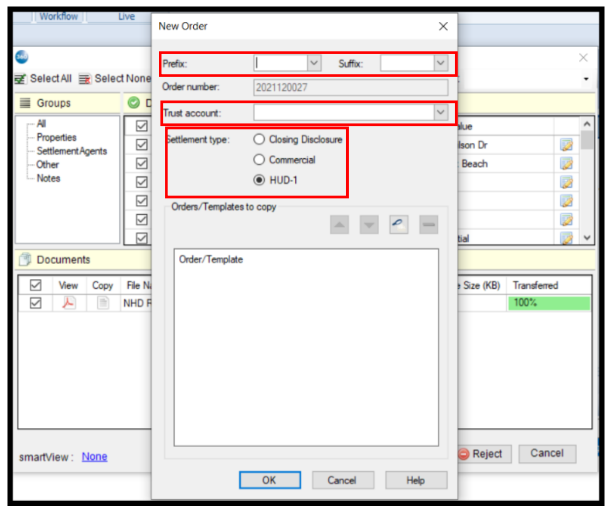
Accepting the 360 Transaction

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

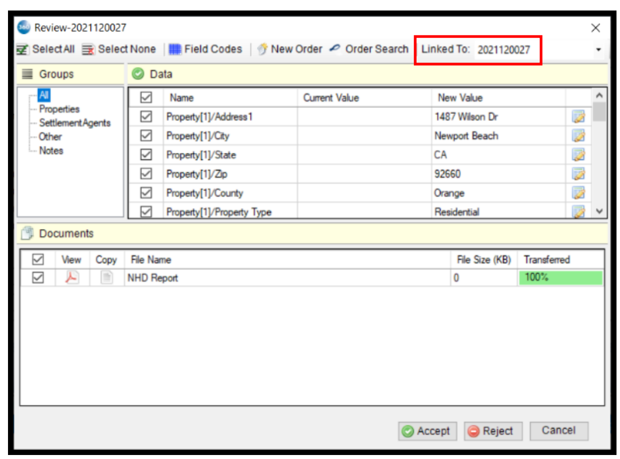


Click the **Next Step** button and the New Order window will appear.

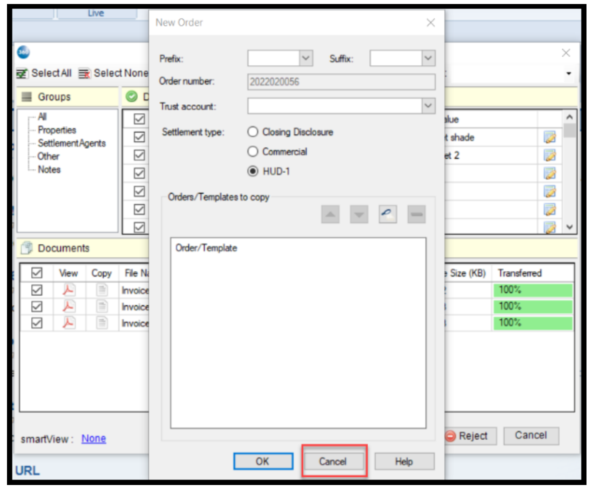
Choose a **prefix** or **suffix** (if required), a **trust account** (if required) and the **settlement type**. Apply a template (if required), then click the **OK** button.



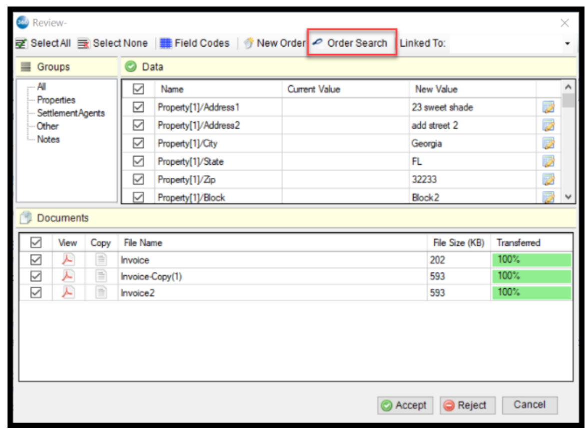
The newly created order is now linked to the 360 transaction.



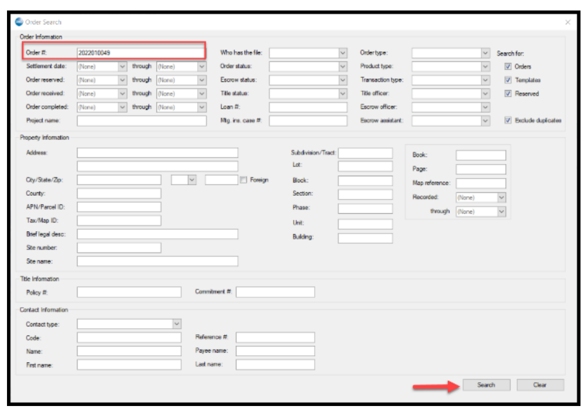
To link an existing order to the 360 transaction, click **Cancel** on the **New Order** screen



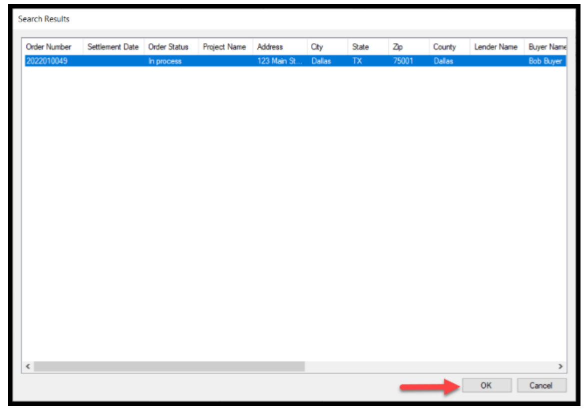
On the **Review** Screen, click **Order Search**



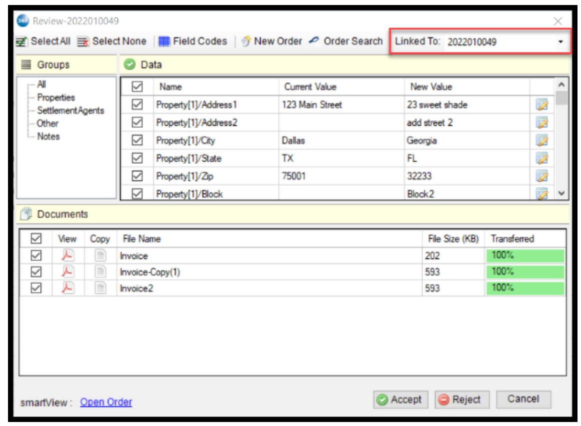
Enter the order number to be linked to the transaction and click **Search**



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



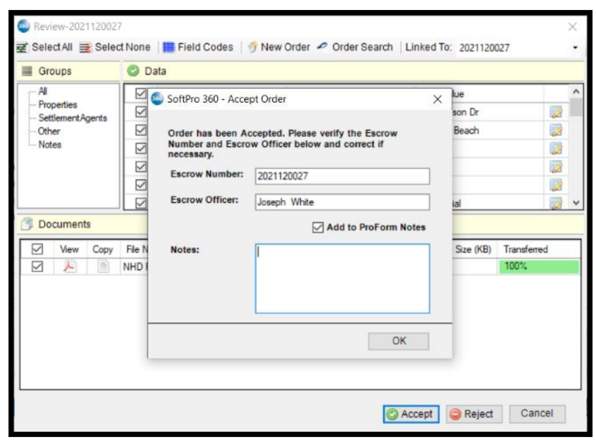
The order number will now show in the **Linked To** box in the upper right corner of the Review screen



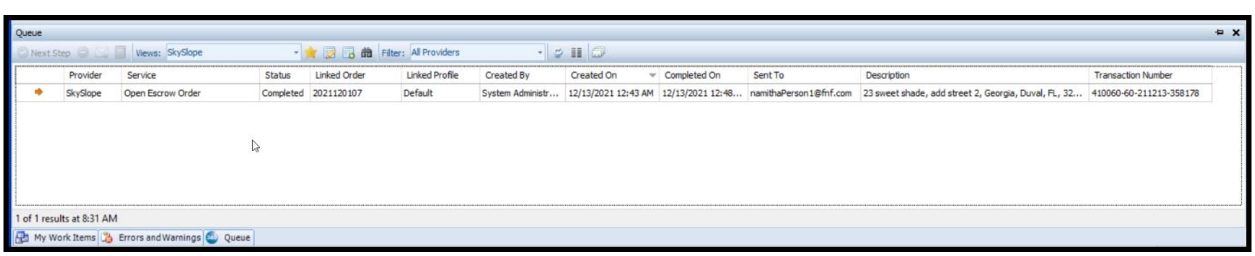
If the order is to be accepted, click **ACCEPT** to import the data into the new order.

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.

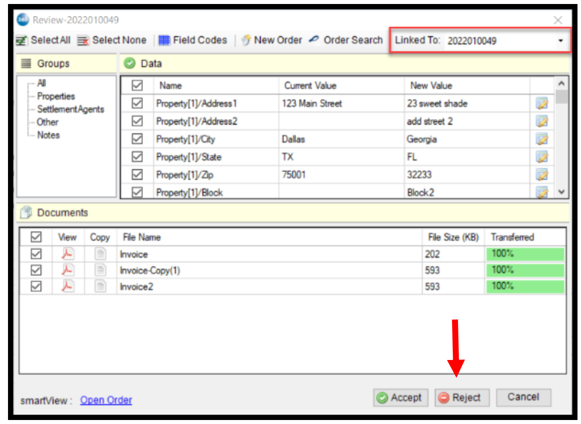


The 360 transaction status is now updated to COMPLETED. The transaction is complete.

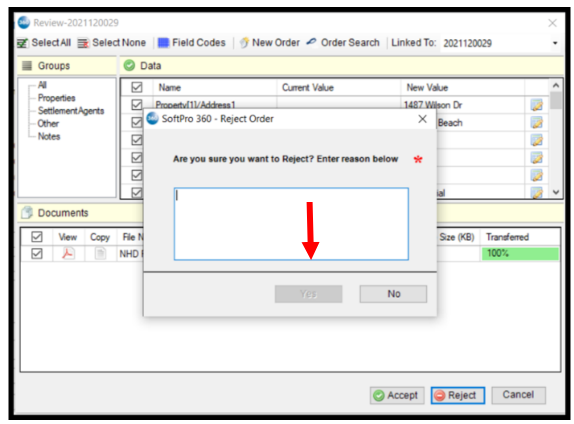


Rejecting a SkySlope Order

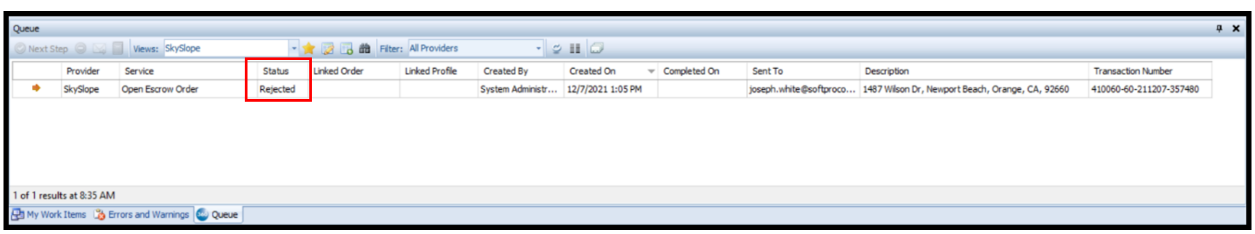
If the order must be rejected, click **REJECT.**



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.



The 360 transaction status is updated to REJECTED

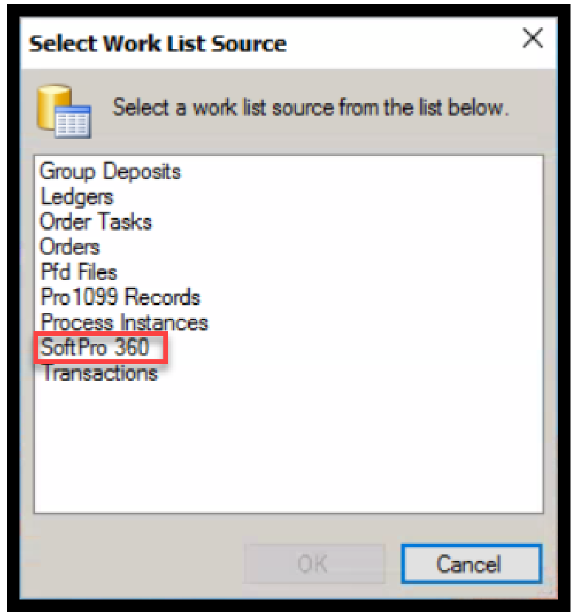


Setting up Work Lists

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.

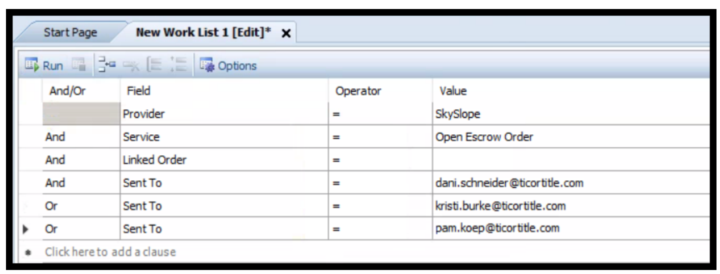
On the Select Work List Source pop up, choose SoftPro 360 and click OK



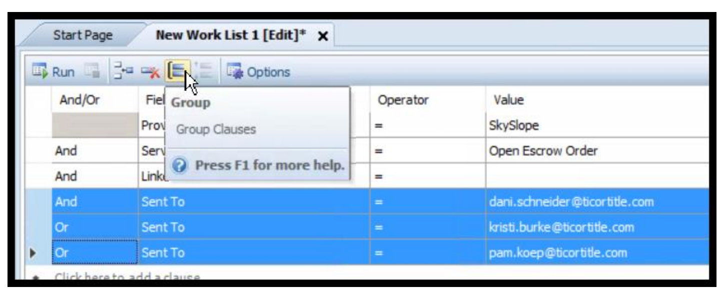
The Work List should be set up as follows

	Provider	Equals	SkySlope
AND	Service	Equals	Open Escrow Order
AND	Linked Order	Equals	<leave blank>
AND	Sent To	Equals	<users e-mail address>
OR	Sent To	Equals	<users e-mail address>

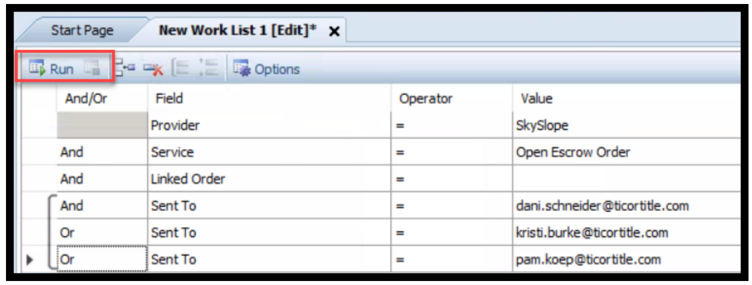
Repeat the OR statement as many times as needed to include all employees who will receive orders



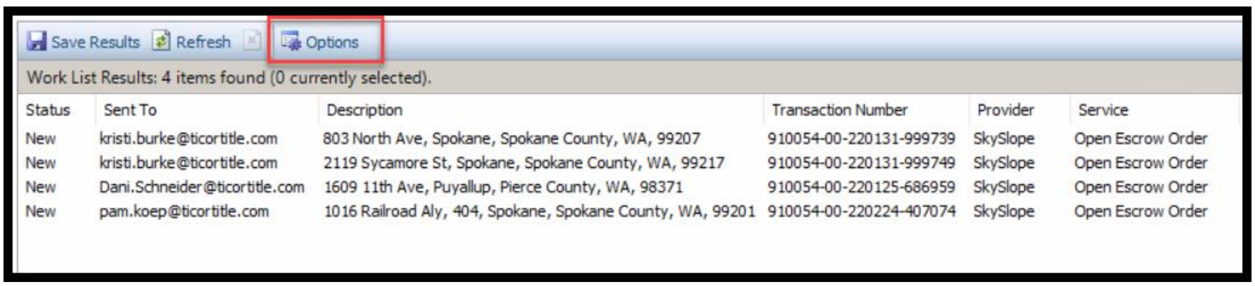
When all desired employees have been added to the Work List, hold the SHIFT key and click to highlight all Sent To lines, then click the Group button to group them together



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

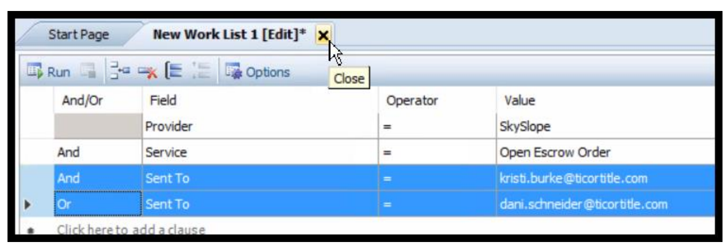


The Work List Results will populate. Clicking **Options** icon in the transaction bar will display the organization of the columns and sort options.

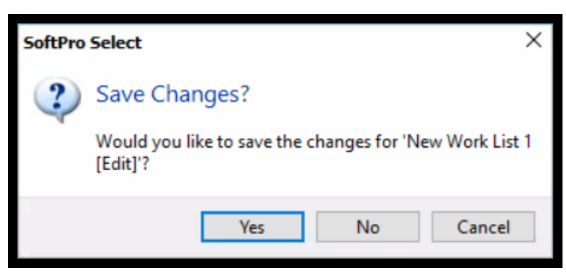


NOTE: Orders can be worked directly from the Work List results by double clicking on the order

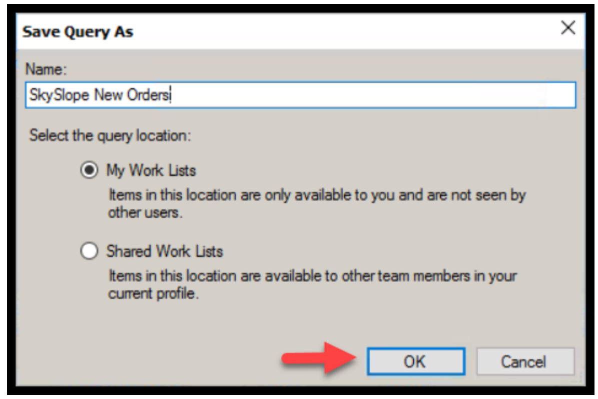
Clicking the **X** on the New Work List tab (or **CTRL + S**) will prompt the save function for the Work List.



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



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