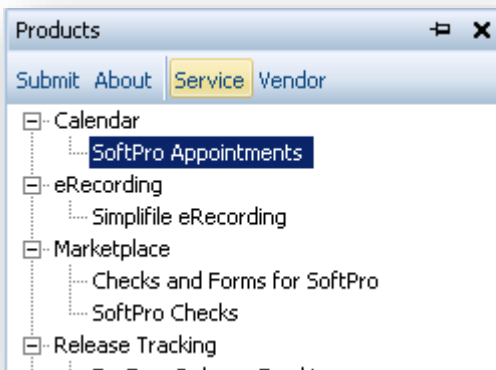


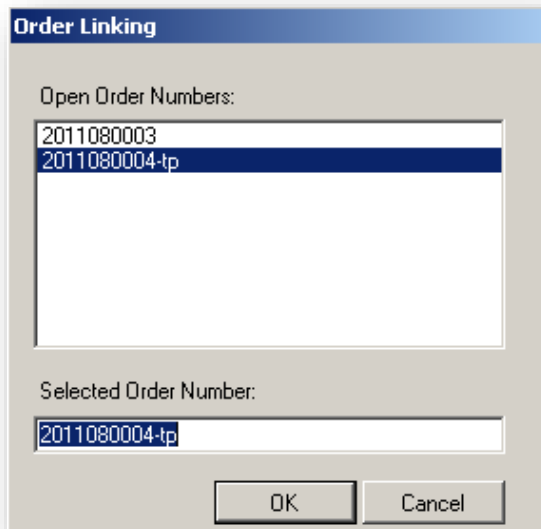
Managing a Microsoft Outlook Appointment within SoftPro 360

In order to help you maintain a streamlined closing process we now have the ability for you to interact with Microsoft Outlook to schedule appointments directly from your SoftPro product. **SoftPro Appointments** seamlessly pulls the Settlement Date, Order Contacts, and Order Contact's email address from ProForm allowing you to quickly invite closing attendees and schedule your closing.

SoftPro Appointments can be found in the **SoftPro 360** Products menu under the Service titled Calendar.



If you already have ProForm order(s) open, they will be listed in the **Order Linking** dialog. The active order will be highlighted and entered in the **Selected Order Number** field. You have the ability to select from any of the open orders, or you may choose to overwrite the **Selected Order Number** with an order that is not currently open. Once you have confirmed the order to link, click **OK** to continue.



Managing New Appointments

The **SoftPro Appointments** screen lists the ProForm order number for which the Outlook Appointment will be scheduled. Under **New Appointment**, the **Appointment Date and Time** will populate from the Settlement Date and Time in the ProForm Order, however these fields can be modified. Contacts from the ProForm order (that contain an email address) will be available in the **Contacts** grid. These contacts are grouped and color coded based upon the contact type; the **Buyer** contact group is blue and will show all buyer related contacts, the **Seller** contact group is green and will show all seller related contacts, and all **Other** contacts are grouped together and referenced as orange.

The **Invite** checkbox allows **Contact(s)** to be an email recipient for the Outlook Calendar Appointment. Check the contacts to be invited and click **Invite Selected Contacts**. This will create an Outlook Calendar appointment which will open for review.

NOTE: A **Meeting Location** can be specified. By doing so, when Outlook is launched by clicking **Invite Selected Contacts**, the meeting room will appear in the Outlook Calendar Location field.

The screenshot shows the 'SoftPro Appointments' window. The title bar says 'SoftPro Appointments'. The main header area says 'SoftPro Appointments (2011080004-tp)' and has the 'SOFTPRO' logo. The window is divided into two main sections: 'Existing Appointments (0)' on the left and 'New Appointment' on the right. The 'New Appointment' section contains fields for 'Appointment Date' (09/23/2011) and 'Appointment Time' (10:00 AM), and a 'Meeting Location' field. Below these is a table of contacts with an 'Invite' checkbox for each. The contacts are color-coded: blue for Buyer, green for Seller, and orange for Other. The 'Invite Selected Contacts' button is at the bottom right of the contact list. A 'Close' button is at the bottom right of the window.


Contact	Invite
B Bob B Uyer	<input checked="" type="checkbox"/>
B2 buyer buyer	<input type="checkbox"/>
S Stan Seller	<input type="checkbox"/>
L Paul Lender	<input type="checkbox"/>
LB Randy Listing	<input type="checkbox"/>
SB Ryan Selling	<input type="checkbox"/>
AT Kathy Cada	<input checked="" type="checkbox"/>
A Bobby First	<input type="checkbox"/>
T Kyle Title	<input type="checkbox"/>

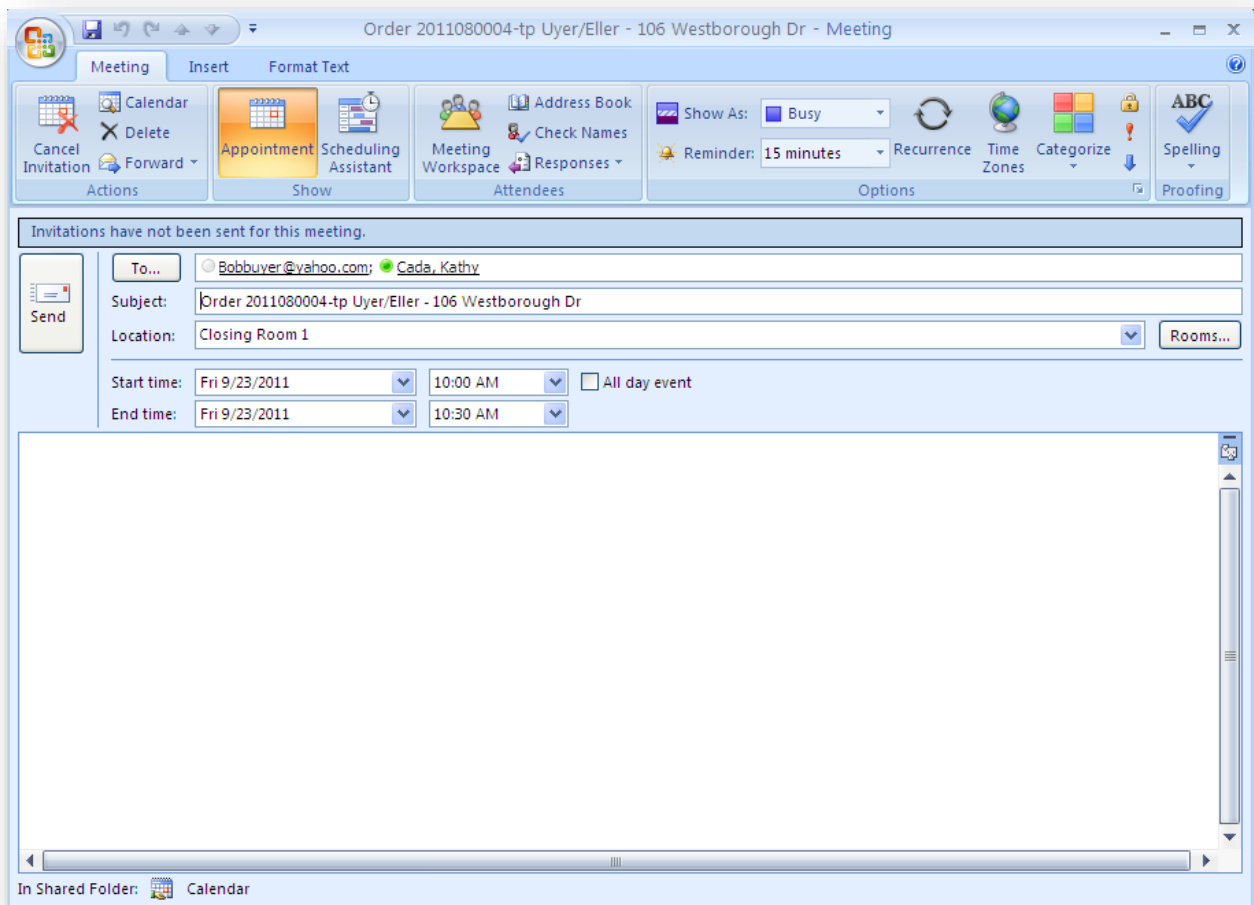
The Outlook Calendar Appointment **To** field will populate with the **Contacts** invited from the **SoftPro Appointments** screen. The **Subject** field will populate with the Order number, Buyer's last name/Seller's last name (if applicable), and the property's street address. (If the setting for the **Default Subject** is modified ([See Managing Settings](#)), the Subject field will populate accordingly) The **Location** field will populate with the **Meeting Location**, if one was entered on the **SoftPro Appointments** screen.

The Outlook **Start time** will populate with the **Appointment Date & Time** entered on the **SoftPro Appointments** screen.

The **Outlook End time** will populate based upon the **Default Meeting Duration** time selected on the **SoftPro Appointments Settings** screen ([See Managing Settings](#).)

Make any needed changes to the Outlook Calendar appointment and click **Send**.







NOTE: Edits to Location and Start time can be made in Outlook and will flow back to the **SoftPro Appointments** screen. Email recipients can be added and/or deleted and the **SoftPro Appointments** screen will also update accordingly. Contacts added that are not in the ProForm order will show in the Existing Appointments section as .

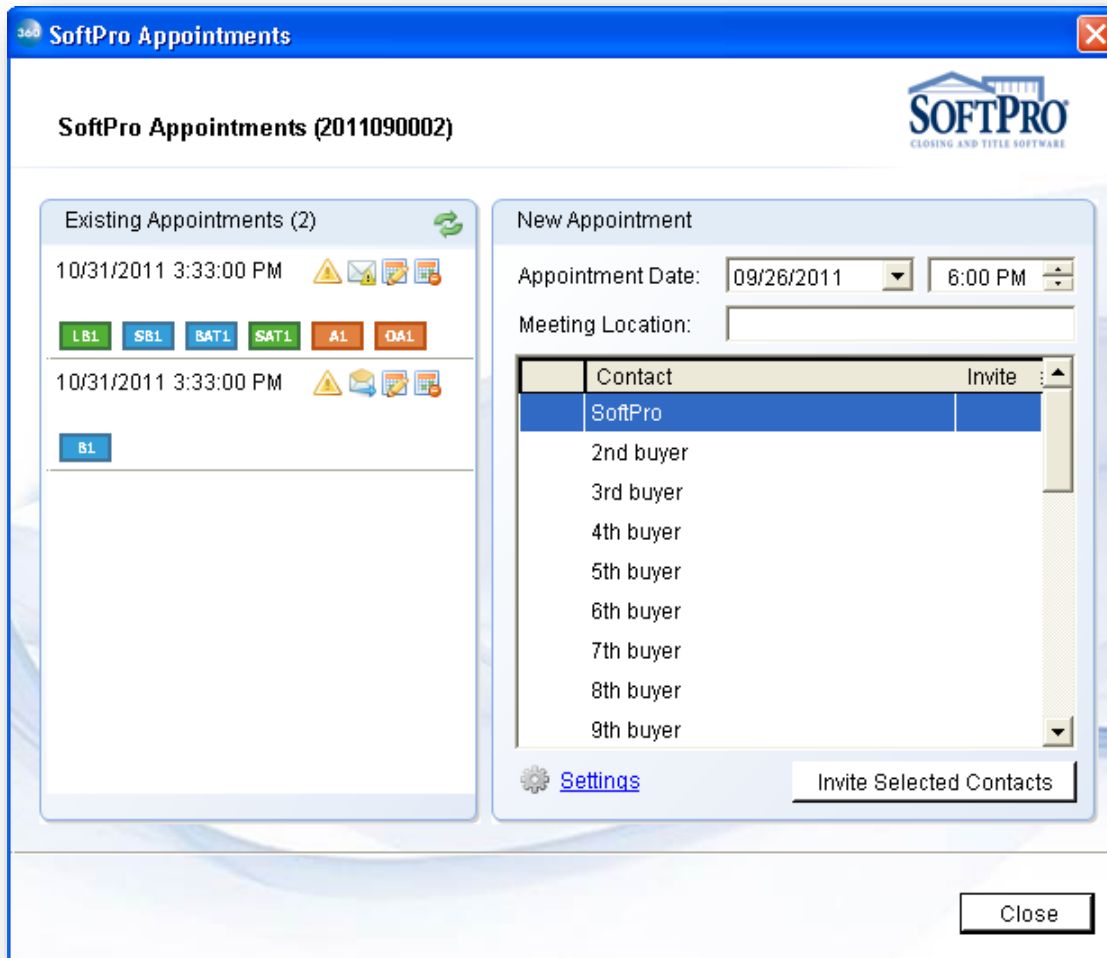


Managing Existing Appointments

Once **Invite Selected Contacts** has been clicked the **Existing Appointments** section of the **SoftPro Appointments** screen will update and show all appointments scheduled for the linked order. The **Existing Appointments** section will display with the following Appointment information: Date, Time, Meeting Location (if entered), and invited contact icons.

The following icons will also appear:





- The Outlook Appointment has been created but the email has not been sent .
- The Outlook Appointment email has been sent .
- Settlement Date Warning  (if applicable and turned on. [See Managing Settings](#))
- Edit Appointment  (opens the Outlook Calendar Appointment for editing)
- Delete Appointment  (deletes Appointment from **SoftPro Appointments** and Outlook)
- Refresh  (click after making any edits/deletions in Outlook to update SoftPro Appointments)







SoftPro Appointments

SoftPro Appointments (2011090002)

Existing Appointments (2)

10/31/2011 3:33:00 PM    

LB1 SB1 BAT1 SAT1 A1 OA1

10/31/2011 3:33:00 PM    


B1

New Appointment

Appointment Date: 09/26/2011 6:00 PM

Meeting Location:


Contact	Invite
SoftPro	<input type="checkbox"/>
2nd buyer	<input type="checkbox"/>
3rd buyer	<input type="checkbox"/>
4th buyer	<input type="checkbox"/>
5th buyer	<input type="checkbox"/>
6th buyer	<input type="checkbox"/>
7th buyer	<input type="checkbox"/>
8th buyer	<input type="checkbox"/>
9th buyer	<input type="checkbox"/>

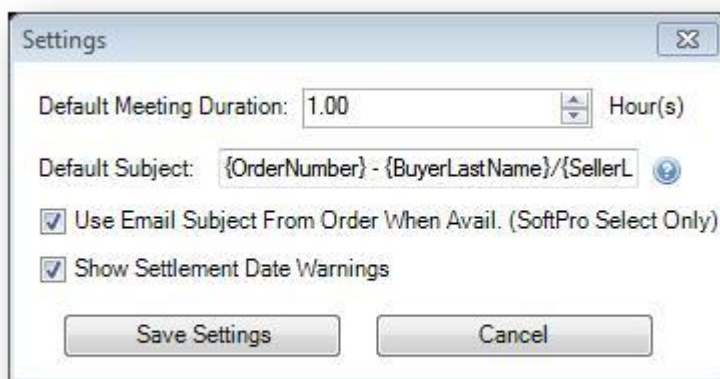
 [Settings](#)

Managing Settings

The **Settings** screen button is found at the bottom of the **SoftPro Appointments** screen.

On this screen you can set the **Default Meeting Duration**, customize your Outlook Calendar Subject line through the **Default Subject** field, and select to show the **Settlement Date Warning**.

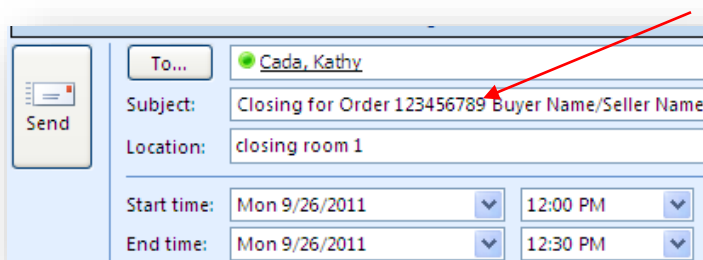
- The **Default Meeting Duration** determines, in hours, how long an appointment will last. This will be reflected in the Outlook Calendar Appointment as the **End time**.
- The **Default Subject** field is used as the template for the Outlook Calendar Subject line and can be modified. By default the subject line will read as:
{OrderNumber} - {BuyerLastName}/{SellerLastName} {PropertyAddress}
- For SoftPro Select users, the Email subject line field (found on the Order Information screen within Select) will populate into the Outlook Subject line if the **Use Email Subject From Order When Avail.** box is checked.
- When **Show Settlement Date Warning** is checked, the **Settlement Date Warning** icon  will appear in the **Existing Appointments** section of the **SoftPro Appointments** screen if there is a discrepancy between the Settlement date and the Appointment date.



The screenshot shows a 'Settings' dialog box with the following fields and options:

- Default Meeting Duration:** A text box containing '1.00' and a unit label 'Hour(s)'.
- Default Subject:** A text box containing the template '{OrderNumber} - {BuyerLastName}/{SellerL'.
- ☒ **Use Email Subject From Order When Avail. (SoftPro Select Only)**
- ☒ **Show Settlement Date Warnings**
- Buttons:** 'Save Settings' and 'Cancel'.

Hint: Appointments created in Microsoft Outlook will display in **SoftPro Appointments** when the Order Number is entered somewhere within the Outlook Calendar Subject line.



The screenshot shows an Outlook appointment form with the following details:

- To...**: Cade, Kathy
- Subject:** Closing for Order 123456789 Buyer Name/Seller Name (A red arrow points to the order number '123456789' in the subject line.)
- Location:** closing room 1
- Start time:** Mon 9/26/2011, 12:00 PM
- End time:** Mon 9/26/2011, 12:30 PM
- Buttons:** 'Send'.

Minimum Requirements

The necessary requirements for **SoftPro Appointments** are Microsoft Outlook 2003 or higher. If this requirement is not met the following screen will appear when attempting to launch **SoftPro Appointments**:

