

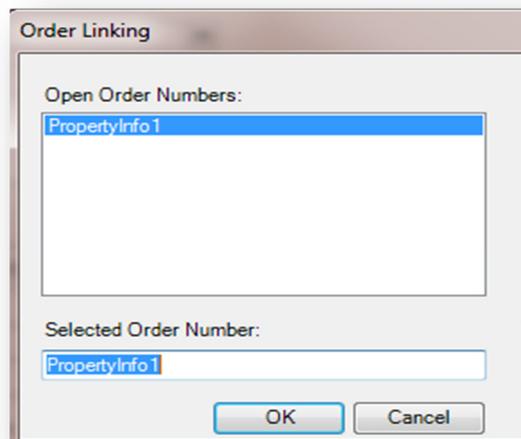
Managing Stewart – Orders Gateway Transactions in SoftPro 360

How to Submit a Transaction

Stewart – Orders Gateway (PropertyInfo) can be found in the SoftPro 360 Products menu under Title Services.

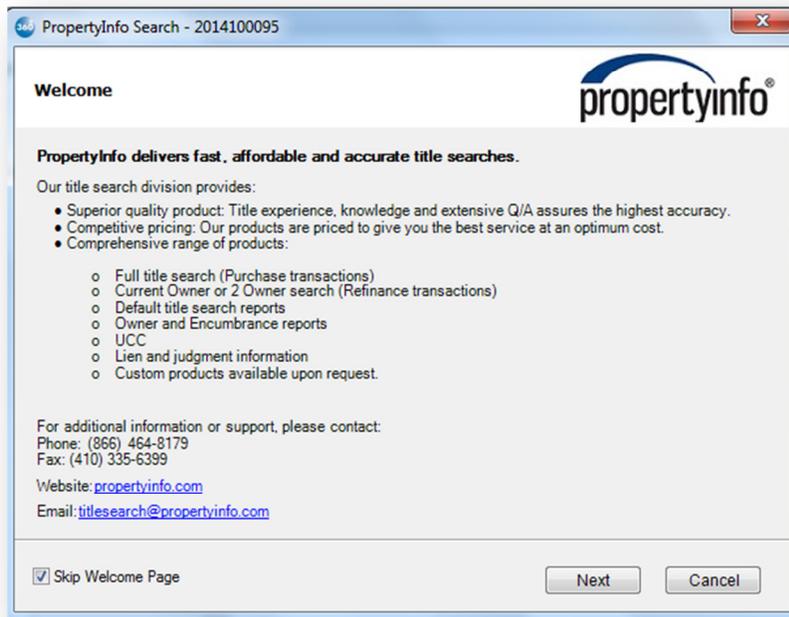


If a ProForm order is already open, it will be listed in the Order Linking dialog. The active order will be highlighted and entered in the Selected Order Number field. Any of the orders listed can be selected or the Selected Order Number can be overwritten with an order that is not currently open. Click OK to continue.

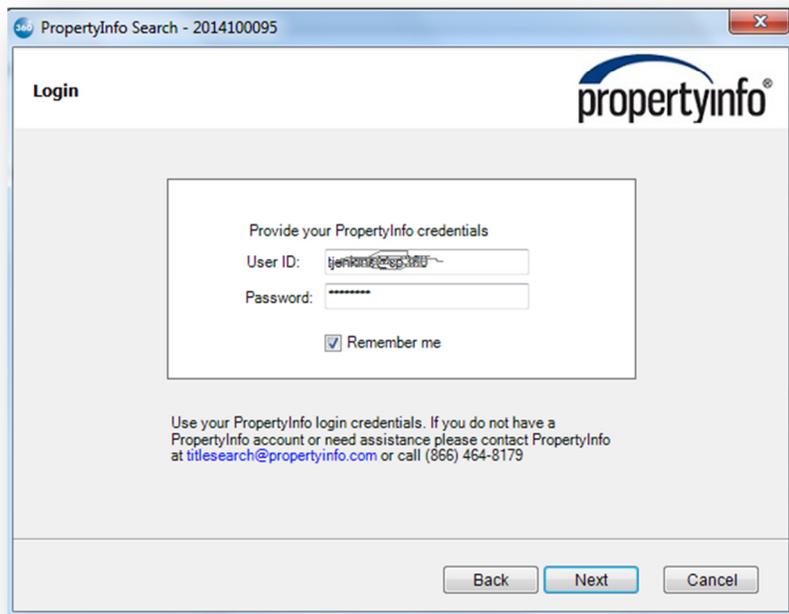


The Welcome screen provides a brief description about PropertyInfo along with PropertyInfo's support contact information. This screen may be skipped in the future by clicking on the 'Skip Welcome Page' option. Click Next to continue.

9.3.2014



The Login screen requires a User ID and password provided by PropertyInfo. If the 'Remember me' check box is selected the User ID and Password will be saved the next time the product is launched. Click Next to continue.



The Data Review Screen allows the County, Transaction Type and Due Date to be selected. The County field will attempt to validate the County from the ProForm Order. If a match can not be made then a County will need to be selected from the drop down. Due date can be selected by clicking on the drop down calendar. Once all information is selected click Next to continue.

PropertyInfo Search - 2014090059

Data review

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The following information will be sent with the order

County: Adams

Transaction Type: Resale - Short Sale

Due Date: 11/05/2014

[File Information](#) Back Next Cancel

Should you wish to view or edit the File Information, select the Blue Hyperlink (File Information) in the Bottom Left on the Date Review Screen.

PropertyInfo Search - 2014090059

File Information 

The following information will be sent with your order

Property Type	Single Family		
Address	132	Smith Street	
City/ State/ Zip	Dallas	WI	02500
Sales Price			
Loan 1			
Loan Amount			
Lender Name			
APN/ Parcel ID	202530481900010710		
Subdivision	Remington - Phase 1 Tract 'F'		
Lot			
Unit			
Municipality	Dallas		

Note: Edits made here will not update your ProForm Order

OK Cancel

The appropriate information concerning the ProForm Order will be displayed on the File Information Screen. You may edit or update the values listed on this screen as needed. Click on 'OK' to go back to the 'Data Review' screen.

NOTE: Edits made on the File Information **will not** update your ProForm Order.

From the Data Review Screen, click "Next" to proceed to the the Product Selection screen. The Product Selection screen will display the available products based upon the values selected on the Data review screen above.

Product(s) Selection

Select the product(s) you would like to order

Title Evidence Products

- Full Search (Residential) (\$0.00)
- Starter Search (\$0.00)
- Refinance (C/O) (\$0.00)
- Update from Uploaded Commitment (\$0.00)

Other Services

- PA Utility Search (\$0.00)

Search E&O Coverage

- SearchInsure \$150,000 (\$0.00)
- SearchInsure \$250,000 (\$0.00)
- SearchInsure \$500,000 (\$0.00)

Buttons: Back, Next, Cancel

You may select one or multiple products to order through PropertyInfo. However, you can only order one product from each category (Title Evidence Products, Other Services or Search E&O Coverage) At least one product needs to be selected in order to proceed to the next screen.

Once you have selected the desired products, Click "Next" to proceed to the Party Review screen.

Party Review

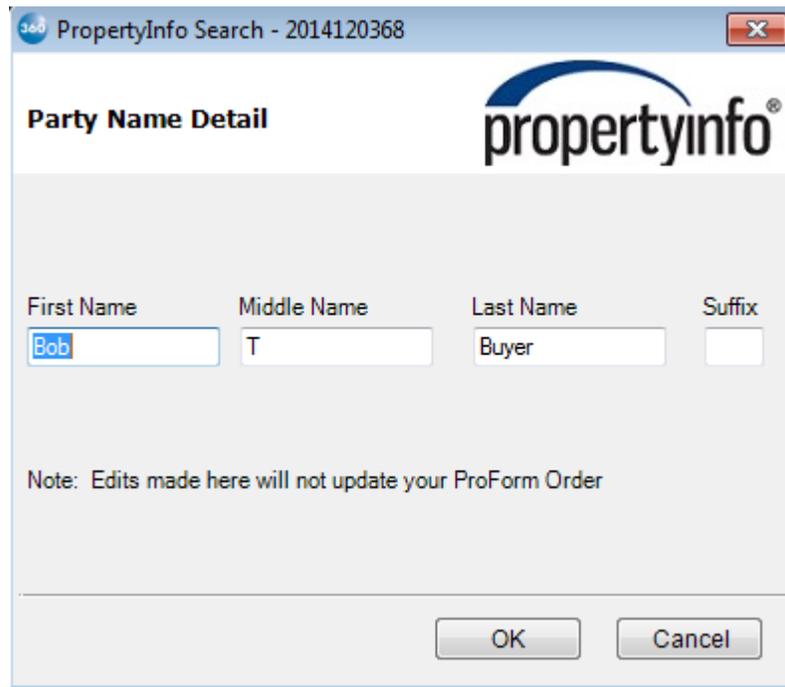
The following information will be sent with the order

Party Type	Name	
Buyer	Bob T Buyer	edit
Seller	Sally M Seller	edit

Tooltip: First Name: Bob, Middle Name: T, Last Name: Buyer, Suffix:

Buttons: Back, Next, Cancel

You can view the relevant parties in the ProForm Order that will be sent to PropertyInfo. The User can place the cursor over the name for the tool tip to show the name as it appears(first/middle/last/suffix). To edit the names being submitted, click the blue “edit” link to the right of the name you wish to edit. This will bring up the Party Name Detail dialogue. To save any edits made on Party Name Detail screen, you need to click on ‘OK’ after the edits, clicking on ‘Cancel’ will not save the edits.

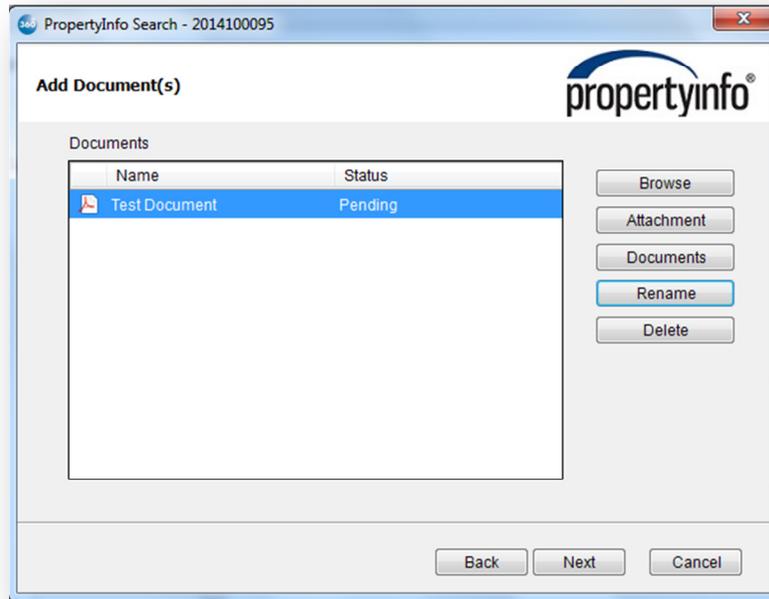


The screenshot shows a dialog box titled "PropertyInfo Search - 2014120368" with a close button in the top right corner. The main heading is "Party Name Detail" next to the "propertyinfo" logo. Below the heading are four input fields: "First Name" containing "Bob", "Middle Name" containing "T", "Last Name" containing "Buyer", and "Suffix" which is empty. A note below the fields states: "Note: Edits made here will not update your ProForm Order". At the bottom right are "OK" and "Cancel" buttons.

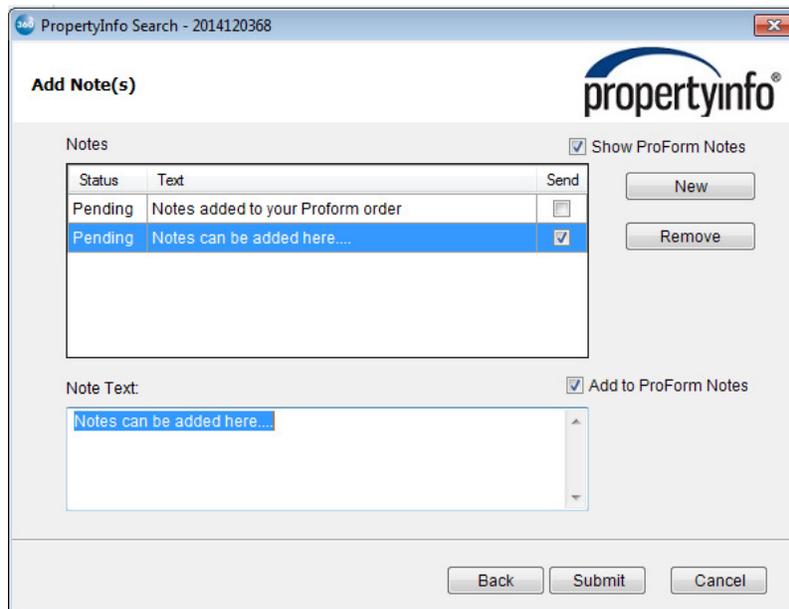
NOTE: Edits made on the File Information **will not** update your ProForm Order.

Click Next to continue to the Add Documents screen.

The Add Document(s) screen allows for a document to be attached and submitted. The document can be attached by either clicking on 'Browse', 'Attachment' or 'Documents'. The User can also rename the document or delete it by highlighting the document and clicking on 'Rename' or 'Delete' button respectively. Once the document(s) is attached click Next to continue.



You may add Note(s) relating to the product(s) if you wish, this can be done by clicking "New" on the Add Note(s) screen..



By default the notes entered in your Proform order will also be displayed on 'Add Note(s)' screen. You can send this notes to PropertyInfo by checking the box under 'Send' column. If you do not want the order notes to be shown on this screen, you can simply uncheck the 'Show ProForm Notes' check box.

By default, the notes added on this screen will be saved to the ProForm Order notes. If you do not want the notes to write to the ProForm Order, uncheck the 'Add to ProForm Notes' checkbox.

Click "Submit" to order the products from PropertyInfo.

SoftPro 360 Queue

The transaction will appear in the SoftPro 360 Queue with a status of 'In Progress'. If the User orders multiple products, each product will have unique transaction number(s) linked to the same order. The PropertyInfo product will be reflected in the description field for each of these transactions.

Transaction Number	Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On	Completed On	Description
410060-10-141208-027535	Stewart	Orders Gateway	In Progress	2014120368		savtri akella	12/8/2014 1:14 PM		Search/Insure \$150,000
410060-10-141208-027534	Stewart	Orders Gateway	In Progress	2014120368		savtri akella	12/8/2014 1:14 PM		PA Utility Search
410060-10-141208-027533	Stewart	Orders Gateway	In Progress	2014120368	\\Default	savtri akella	12/8/2014 1:14 PM		Full Search (Residential)

How to Review a Transaction

Once PropertyInfo has completed the transaction the status will change to Ready in the SoftPro 360 Queue. Highlight the transaction and click the Next Step Button or double click on the transaction to open the review screen.

Name	Current Value	New Value
Property/ Phase		2
Property/ Building		carpenter
Loans[1]/ LoanAmount	485000.00	485000.00
Legal		ALL THAT CERTAIN land a...
Vesting	cold seller	Cold Seller and Seller two
Interest or Estate		Fee Simple
Effective Date		2/10/2015 12:00:00 AM
Sales price	485000.00	485000.00
Exceptions [1]/ Description		BEING KNOWN AND DESI...

View	Copy	Document Name	File Name	File Size	Transferred
<input checked="" type="checkbox"/>		Title Search Report	Title Search Report.pdf	31,771.00 KB	100%

PropertyInfo will return data and document(s) which will be visible on the Review Screen. The 'All' label expands to display the Title, Exceptions, Requirements and Notes. The 'Title' label expands to show all the title data the user can accept into the order. By default, the checkbox for any title data that has been edited, added new or deleted by PropertyInfo for a particular field will be checked to alert the user of the change. If you do not want to accept the edited fields, you can uncheck the box before clicking on "Accept". The existing Requirements and Exceptions in the ProForm order can be overwritten by checking the 'Overwrite Requirements/Exceptions checkbox. By unchecking the box the new Requirements and Exceptions displayed on the review screen will be added to the existing Requirements and Exceptions in the ProForm order (if any).

The Review Transaction screen allows document(s) to be viewed by clicking the View icon. You can also copy the document(s) to the clipboard by clicking the Copy icon. Click Accept to add the data and document(s) to the linked ProForm order.

Note: If it is a product that does not require data or document back, the user will get a blank review screen.

Once the remits are accepted, for Classic users, the document(s) will be available from within the linked ProForm order via the SPImage icon located on the ProForm Menu bar, or for Select users, the document(s) will be available by clicking on the Attachments & Documents History link located in the documents tab. If the data and documents should not be accepted, the Cancel button closes the Review screen and no data or documents will be accepted.

Request an Update:

The transaction will update to an Accepted status after clicking Accept. The User can trigger the Update functionality only when the transaction is in the 'Accepted' status. The user can trigger the Update functionality by highlighting the transaction and either double clicking on it or clicking the 'Next Step' icon.

The Login screen requires a User ID and password provided by PropertyInfo. If the 'Remember me' check box is selected the User ID and Password will be saved the next time the product is launched. Click Next to continue.

Update

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Order an update

Provide your PropertyInfo credentials

User ID:

Password:

Remember me

Back Next Cancel

You may send comments/requests for the updates, this can be done by clicking “New” on the Add Note(s) screen and entering your comments/requests.

PropertyInfo Search - 2014120372

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Add Note(s)

Notes Show ProForm Notes

Status	Text	Send

New

Remove

Note Text:

Add to ProForm Notes

Back Submit Cancel

Click “Submit” to order the updates from PropertyInfo.

Once the update is submitted to PropertyInfo, the transaction status changes to 'In Progress' again. Incoming updates will change the status of the transaction to 'Ready' then back to 'Accepted' after the updates have been accepted. Updates can be sent up to one year from the original order date at which point the transaction status changes to 'Completed'. No updates or remits can be sent or received using the 'Completed' transaction.