

Sync User Guide for Title Providers

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History

Date	Version	Details
3/22	V2	Email notification of Incoming RequestCreating Document Hyperlinks
6/11/2019	V1	Original Release

Introduction

This document provides steps on how to use Sync to receive a title search or a bringdown request from another 360 customer and how to send the results back to the customer once those requests are fulfilled.

Receiving a Title Search Request

Email Notification of an Incoming Request

When a customer sends you a title search request from **SoftPro 360**, you will receive an email notification, and a transaction number for the request will be sent to your **360 Queue**. The email will include information on who ordered it, the 360 transaction ID created for the request, and the property address. You will need to find the transaction number in your **360 Queue** to act on the request.



Locating a Request in your 360 Queue

From your **360 Queue**, change the **Views** filter to **New Transactions**. A new title request will always have a status of **New**. Change your Filter to **Sync** to further refine your search. The values in both the **Description** and the **Transaction Number** columns should match the property address and transaction ID referenced in the notification email.

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ſ		Sync	Powered by SoftPro	New			sysadmin	5/31/2019 11:14 AM	Tools	4237 Carriage Dr, Apopka, FL, 32703	Best Ever Escrow	Orange	nory.pollock@softprocorp.com	Title Search 1	FL	410060-70-190531-224389

Sorting Requests in your 360 Queue

You can sort requests in your **360 Queue** by clicking directly on a column heading. The following is a description of each column to help you determine what values you can use to organize and track your requests.

Column Name	Value
Provider	SoftPro
Service	Powered by SoftPro
Status	Transaction Status (New, In Progress, Ready, or Rejected)
Linked Order	Order number
Linked Profile	The name of your linked profile
Created By	SoftPro Sync
Created On	Date and time the 360 transaction was created
Category	Tools
Description	Property Address, City, State, Zip
Provider Reference Name	Company name that ordered the request
Event	Property County
Contact	Customer's email address>
Product	Product name
Sub Product	Property state
Transaction Number	Transaction Number

Selecting the Request Transaction

Once you have found the title search request, highlight the transaction, and click the **Next Step** button. This will open the **Review** screen.

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	Sync	Powered by SoftPro	New			sysadmin	5/31/2019 11:14 AM	Tools	4237 Carriage Dr, Apopka, FL, 32703	Best Ever Escrow	Orange	nory.pollock@softprocorp.com	Title Search 1	FL	410060-70-190531-224389

Adding Request Data to an Order

Linking a ProForm Order to Request Data

The **Review** screen displays the request data, notes and/or documents sent by the 360 customer. You will need to add this data to a new or existing ProForm order. You will be able to do this directly from the **Review** screen.

NOTE: If an update to this title search (bringdown) is ordered in the future, you will be unable to change the linked order.

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- **New Order** Opens the same screen within your host system (Select or Standard) used to begin the creation of a new order.
- Order Search Opens 360's Order Search screen where you can enter search criteria to find your order.
- Linked To: If one or more orders are currently open in your active session, they will display as options for you to select from.

Once you have selected an order, it will display as the selection in the **Linked To** drop-down. Note that for bringdown orders, the options to select an order will not be accessible.

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All		Name	Current Value	New Value		^
···· Property ···· Title		Property Street Address 1		4237 Carriage Dr		
Contacts		Property Street Address 2				

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Selecting Request Data for your Order

From the **Review** screen, you can view the title data and documents returned by the title provider and select those you want to include in your linked order.

- Groups Displays the data tree. Selecting a branch of the tree will display only the data relevant to that branch.
- Data Displays the Current Value for the field in your order and the New Value sent by the title provider. The New Value will

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II All			\checkmark	Name		Current Val	ue	New Value			^
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overwrite the Current Value when you click Accept.

- Notes Any comments added by the customer will display here. Check Add to ProForm Notes if you want to import these notes into your ProForm order for future reference.
- **Documents** Displays the documents that were included with the request. The **View** icon keep allows you to open and review the document prior to importing it into the order, and the **Copy** icon allows you to copy and paste the document to your desktop.

Importing Data to your Order

Once you have specified the data, documents, and notes you want to add to your order, click **Accept** to import this information. The transaction status will change from **New** to **In Progress** in the 360 Queue. You can change your **Views** filter to either **In Progress** (or **Active Order** if the order is open and active on your screen) to help you find the transaction. The **Linked Order** column in the Queue will now display the order number.

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	Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On	Sent To	Category	Description	Provider Reference Name	Event	Contact	Product	Sub Product	Transaction Number
	Sync	Powered by	In Progress	Prov-S0530-200	Default	sysadmin	5/31/2019 11:14 AM		Tools	4237 Carriage Dr,	Best Ever Escrow	Orange	nory.pollo	Title Sear	FL	410060-70-190531-224389

Press **Close** on the **Review** screen if you decide not to take any action. The transaction's status will remain **New**, and you will be able to return to the **Review** screen at a later time to accept the information into an order.

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Rejecting a Request

You also have the option of rejecting a request by clicking the **Reject** button from the Review screen. This will open the **Reject** screen.

Enter your reason for rejecting the request and click **Submit**. This will automatically send an email notification to the customer that you rejected the request along with your reason. The status of your transaction and the customer's transaction will both update to **Rejected** in your respective 360 Queues.

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	Groups	🕑 Da	ita						
۱	All Property		Name		Current Value	New Value			^
	Title		Property Street Addre	ess 1 ess 2		4237 Carriage	e Dr		
	Other		Property City			Apopka			
			Property State			FL			
			Property Zip			32703			v
	Notes					🖂 Add	To ProForm Ne	otes	
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	Documents								
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Sending Title Search Results

Specifying Results Data

Once the title search is complete and you are ready to send the results to the customer, highlight the corresponding **In Progress** transaction in your 360 Queue and click **Next Step**. This will open the **Submit** screen.

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		Sync	Powered by	In Progress	Prov-S0530-200	Default	sysadmin	5/31/2019 11:14 AM			Tools	4237 Carriage Dr,	Best Ever Escrow	Orange	nory.pollo	Title Sear	FL	410060-70-190531-224389

The **Submit** screen allows you to pull together the data and documents of the title search from your order and to send it back to the customer via 360.

- **Groups** Displays the data tree. Selecting a branch of the tree will display only the data relevant to that branch.
- Data Select the data.
- Notes Enter any comments you want to include for the customer. Check Add to ProForm Notes if you want to add it to your ProForm order notes upon clicking Submit.
- Add Documents See the Add Documents Section of this document for details.

Creating Document Hyperlinks

By using the Create Hyperlink icon a user can add hyperlinks to a requirement or exception. Within the Edit Requirement or Exception dialog box, place your cursor in front of the text you want to become a hyperlink and add an open bracket '['. Place your cursor at the end of the text and close the text with a closed bracket ']'.

In our example, we want the tax parcel verbiage to be hyperlinked. We enter, [Parcel No.: 722509279009].

Highlight the verbiage you would like to link (in the brackets) and click on the Hyperlink Icon will receive a Add Hyperlink where you need to attach the document to be linked, double click your document, click OK to link. Now, click OK to accept the Exception/requirement. The brackets indicate there is a linked document attached to this requirement.

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🥺 Submit - Prov-S	0530-20	0				×
Groups	🕑 D	ata				
All		Name	Value			^
Property		Property Street Address 1	4237 Carriage Dr			
Other		Property Street Address 2				
		Property City	Apopka			
		Property State	FL			
		Property Zip	32703			
		Property County	Orange			
		Legal				
		Property Township	0			
		Property Township Section	0			
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Note: when you submit to the requestor, you MUST attach this document with the request for the user to be able to use the link.

Adding Documents

Clicking the **Add Documents** link on the Submit screen will navigate you to the **Add Documents** screen where you can attach documents to be sent along with the results data to the customer. You can **browse** and select the document from your system, or you may select any documents **already attached** to your ProForm order.

SoftPro Sync -Prov-S0530-200	×
Add Document(s)	SOFTPRO ST
Documents:	
Name	Browse
Plot_012118.pdf	Attachment
Amp1-22.pdf	Ready Docs
	Rename
	Delete
	Close



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You can also **rename** or **delete** any attachment by selecting the document and performing the desired action. Once you have added the desired documents to your order, click **Close** to return to the **Order Services** screen.

) SoftPro Sync -Prov-S0530-200 Add Document(s)		SOFTPRO' SYNC
Documents:		Province
Plot_012118.pdf		Diowse
Map1-22.pdf	Attached Documents Please select a document attached to the order. Type Description TEST ABC-053119	
	ОК	Cancel

Sending the Results to the Customer

Once you have selected the data and documents and added any notes in the **Submit** screen, click the **Submit** button to send this information to the customer who requested the search. The transaction status will remain **In Progress** in the 360 queue. A notification will display once it is successfully submitted. The customer will also receive an email notification



submitted. The customer will also receive an email notification

that you have sent them title search results. Click **OK** to return to your ProForm order.

Press **Cancel** if you decide not to take any action. The transaction's status will remain **In Progress**, and you will be able to return to this screen at any time to select and submit the information to the customer.

Canceling a Request

You can choose to cancel a request at any time if the transaction is in an **In Progress** status. From the 360 Queue, highlight the transaction and then click the red **Cancel** button from the 360 Queue's toolbar. This will open the **Cancel** screen.

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	Provider	Service	Status	Linked Order	Linked	Created On	Category	Description	Transaction Number	-	
\$	Sync	Powered by SoftPro	In Progress (Default	5/29/2019 3:24 PM	Tools	4237 Carriage Dr, Apopka, FL, 32703	410060-70-190529-224094		

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Enter the reason for canceling your order and click **Submit**. The customer will receive an email notification for the cancellation.

The status of your transaction will update to **Canceled** as will the status of the customer's transaction.

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Cancel		
	Enter reason for canceling this transaction:	
	Will send an updated request	
	Submit Cancel	



A customer may also choose to cancel a request in which case you will receive an email notification and your corresponding transaction will automatically be updated with a **Canceled** status.

	noreply@alpha.softpro360.com Pollock, Nory SoftPro Sync	10:2
	1	1 1
IMPORTA Company	ANT NOTICE - This message sourced from an external mail server outside of the /.	
Best Eve test test	r Escrow has canceled the order with following reason.	
NOTICE: may be p hereby n the mess	The information contained in this message is proprietary and/or confidential and rivileged. If you are not the intended recipient of this communication, you are otified to: (i) delete the message and all copies; (ii) do not disclose, distribute or age in any manner; and (iii) notify the sender immediately.	use

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Receiving a Bringdown Request

Email Notification of an Bringdown Request

When a customer sends you a bringdown request, you will receive an email notification, and the transaction status associated with the original title search request will update from **In Progress** to **Ready** in your 360 Queue. The email will include information on who ordered it, the 360 transaction ID of the bringdown request and the property address. You will need to find the transaction in your 360 Queue to act on the request.

noreply@alpha.softpro360.com developer@softpro360.com; + 2 - 3:12 3:12 SoftPro Sync 3:12	PM V
Bing Maps + Get more ap	ps
IMPORTANT NOTICE - This message sourced from an external mail server outside of the Company.	
Best Ever Escrow has submitted Bringdown request. The new order can be found in the SoftPro 360 queue as transaction number 410060-70-190531-224389.	
Property: 4237 Carriage Dr Apopka, FL 32703	
NOTICE: The information contained in this message is proprietary and/or confidential and may be privileged. If you are not the intended recipient of this communication, you are hereby notified to: (i) delete the message and all copies; (ii) do not disclose, distribute or use the message in any manner; and (iii) notify the sender immediately.	

Locating a Bringdown Request in your 360 Queue

To help locate the bringdown in your **360 Queue**, change the **Views** filter to **Ready**. Change your **Filter** to **Sync** to further refine your search. The values in both the **Description** and the **Transaction Number** columns should match the property address and transaction ID referenced in the notification email.

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•	Sync	Powered	Ready	Prov-S0530-200	Default	sysadmin	5/31/2019 11	Tools	4237 Carriage Dr, Apopka, FL, 32703	Orange	nory.pollo	FL	410060-70-190531-224389

Selecting the Request Transaction

Once you have found the transaction for the bringdown request, highlight the transaction and click **Next Step**. This will open the **Review** screen.

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\$	Sync	Powered by SoftPro	Ready	Prov-S0530-200	Default	5/31/2019 11:14 AM	Tools	4237 Carriage Dr, Apopka, FL, 32703	Best Ever Escrow	Orange	nory.pollo	Title Search 1	FL	410060-70-190531-224389

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Adding Bringdown Data to an Order

Refer to the <u>Adding Request Data to an Order</u> section of this document for guidance on how to add bringdown data to your order. Note that **for bringdowns, your data is already linked to a ProForm order you selected with the original title search request. So, you will NOT be able to update the linked order**.

Sending Bringdown Results

Refer to the <u>Sending Title Search Results</u> section of this document for guidance on how to send bringdown results to the customer.

Canceling a Bringdown

Refer to the <u>Canceling a Request</u> section of this document for guidance on how to cancel a bringdown request from the customer.