

Sync User Guide For Title Search Requests

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History

Date	Version	Details
3/22	V2	<ul style="list-style-type: none"> Submitting the Request - Document Note Functionality Receiving Title Search Results – Email Functionality Submit Automation Accept Automation
6/11/2019	V1	<ul style="list-style-type: none"> Original Release

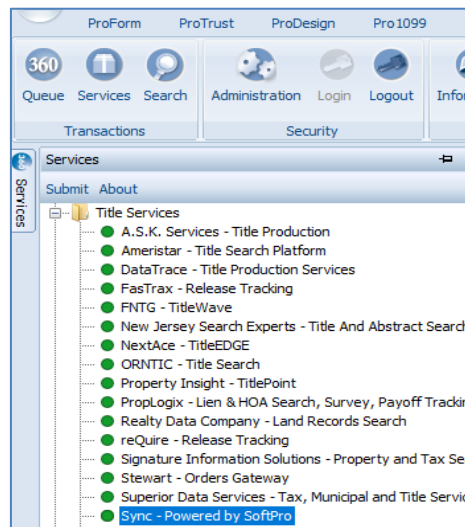
Introduction

This document provides steps on how to use Sync to send a title search or a bringdown request to a provider that you select and how to receive the results of those requests returned from the provider.

Launching Sync

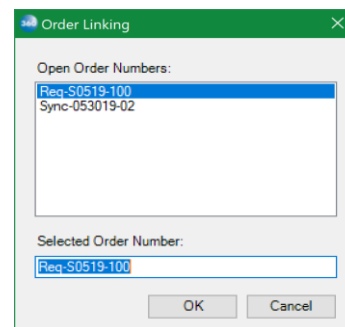
Access from the 360 Services Menu

From the **360 → Services** menu, double-click **Sync – Powered by SoftPro** located under the **Title Services** folder. This will open the **Order Linking** screen:



Linking a ProForm Order

From the **Order Linking** screen, select the ProForm order that will be sent to the title provider you select in Sync.

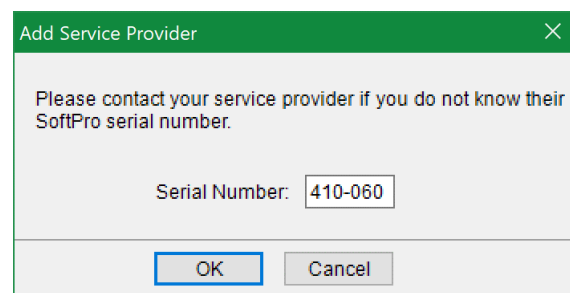
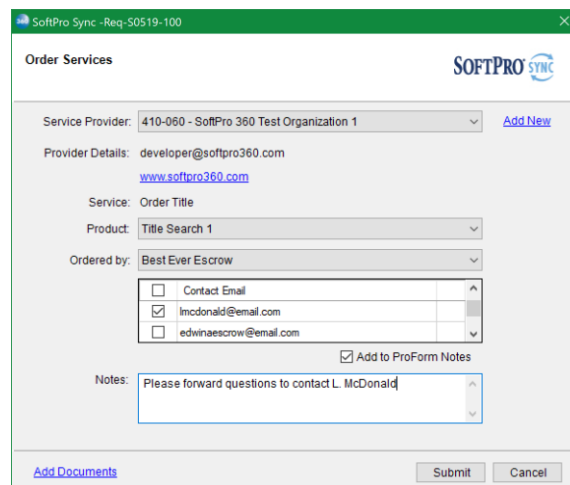


Requesting a Title Search

Specifying Order Data

The **Order Services** screen will display. Specify the information needed for your request.

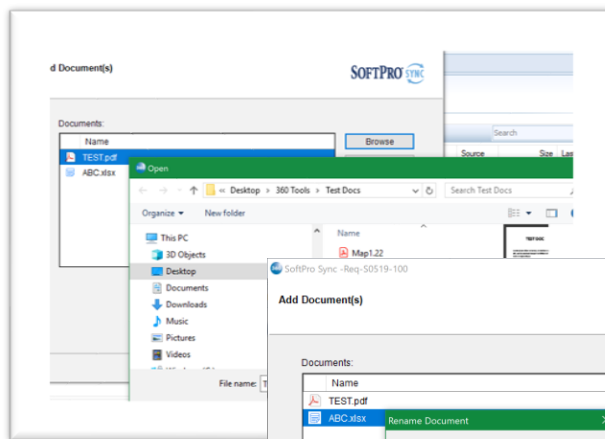
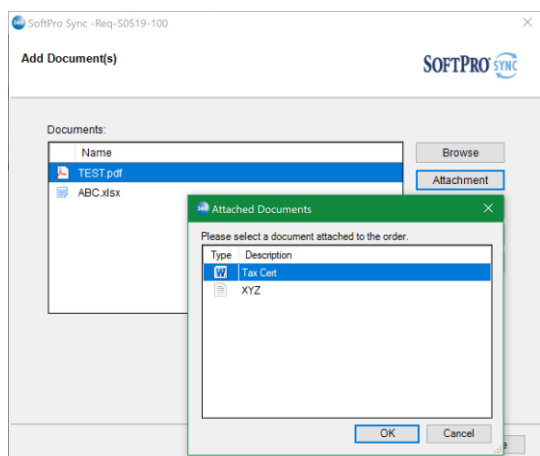
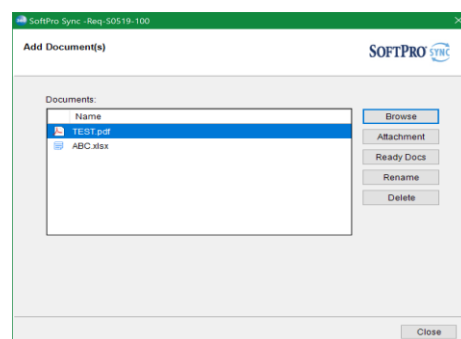
- **Service Provider** – Select a title provider from the list.
 - If you are a first-time user of Sync, no providers will display in the drop down, and you must click **Add New** to add the providers you wish to send your request.
 - You must know the provider's serial number, and they must be registered with SoftPro as a valid title provider for Sync.
 - You can add up to 10 providers, which will remain as options for any order you use with Sync going forward. If you add another provider to a list that already has 10 provider options, then the least recently used will be dropped from the list. By default, 360 looks first to the Attorney, then Title Company, then Settlement Agent in the order, to make an exact string match of Order/[Contact Type](0)/Name.
- **Provider Details** – Displays the email and website addresses of the provider you select.
- **Service** – Will always display as "Order Title" for this version of Sync.
- **Product** – Select from a list of title products offered by the provider.
- **Ordered by** – Select who is placing this request. If your order is in Select, it will select what you have designated as the **Escrow office** in your order by default. Otherwise, it will be blank.
- **Contact email** – Select at least one or more points of contact for the provider.
 - The email address selected will receive notifications when the results of a title search or bringdown request have been returned to you in 360, or if the provider has rejected or canceled your request.



- Your 360 user email address will be selected by default.
- You can add an email address by entering it in the last line of the grid next to the checkbox with no contact.
- **Notes** – Manually add instructions or comments about your order. Check **Add to ProForm Notes** to automatically add your notes to your ProForm order upon submitting your request.
- **Add Documents Link** – See the **Add Documents** section.

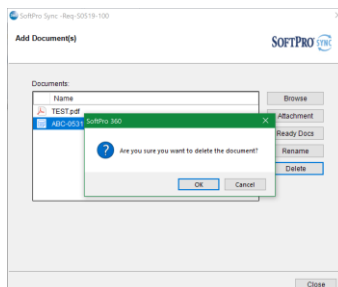
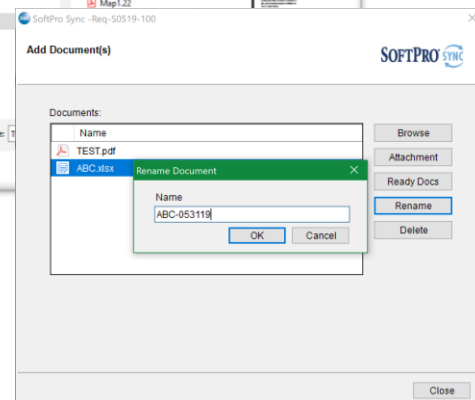
Adding Documents

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



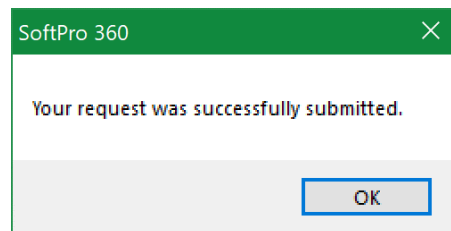
You can also **rename** or **delete** any attachment by selecting the document and performing the desired action.

Once you have added the desired documents to your order, click **Close** to return to the **Order Services** screen.



Submitting the Request

Click **Submit** to send the order details to the title provider you selected. A notification will display once they receive the request. The provider will also receive an email notification that you have sent them a new order request. Click **OK** to return to your ProForm order and to track the transaction from the 360 Queue.



When an order is submitted successfully to the provider the following occur.

- Transaction is created in 360 and displayed in the Queue with an **In Progress** status. The **Linked Order** column will display the ProForm order number, and the **Description** column will display the property address being searched.

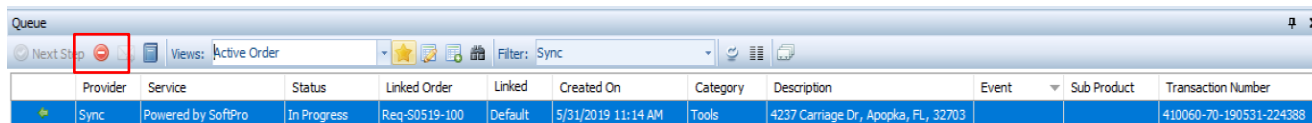
Queue										
Next Step		Views: Active Order	Filter: Sync							
	Provider	Service	Status	Linked Order	Linked	Created On	Category	Description	Event	Sub Product
	Sync	Powered by SoftPro	In Progress	Req-50519-100	Default	5/31/2019 11:14 AM	Tools	4237 Carriage Dr, Apopka, FL, 32703		Transaction Number
										410060-70-190531-224388

- When a document is submitted, a Note will be saved to the Order with the following information.
 - Note Format:
 - Sync Powered by SoftPro
 - Sent to: S/N & Provider Name
 - Product Request: Product ordered by the provider
 - Documents: List of documents sent
 - Field location: To be added; from the Document Upload screen in Sync

03/14/2022 10:48 AM	Derek Ball	Sync Powered by SoftPro Sent To: 410-060 - SoftPro 360 Test Organization 1 Product Request: Current Owner Search Documents: SoftPro 360 Vendor Integration Guide.pdf - 283 KB	Integration
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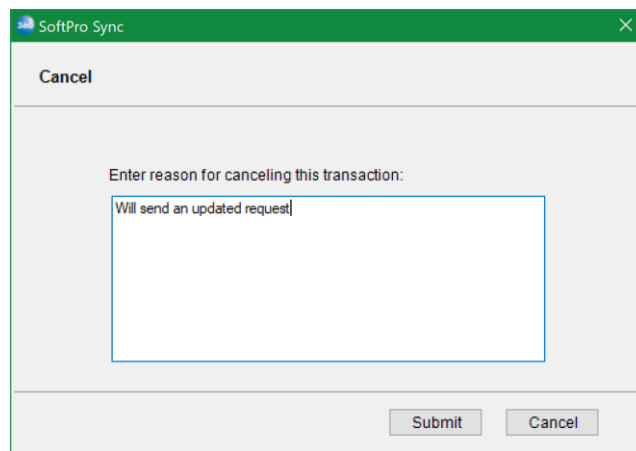
Canceling a Request

You can cancel your request with the title provider if your 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.



Provider	Service	Status	Linked Order	Linked	Created On	Category	Description	Event	Sub Product	Transaction Number
Sync	Powered by SoftPro	In Progress	Req-S0519-100	Default	5/31/2019 11:14 AM	Tools	4237 Carriage Dr, Apopka, FL, 32703			410060-70-190531-224388

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



SoftPro Sync

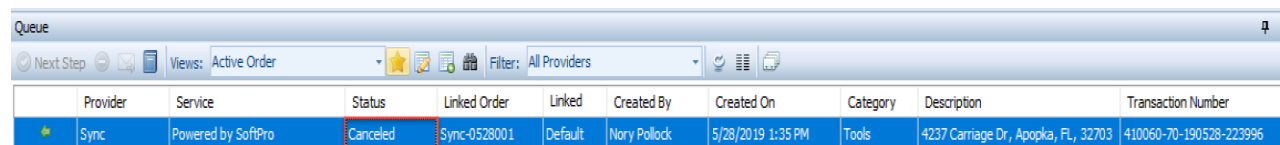
Cancel

Enter reason for canceling this transaction:

Will send an updated request

Submit Cancel

The transaction status in your queue will update to **Canceled** as will the status of the provider's transaction.



Provider	Service	Status	Linked Order	Linked	Created By	Created On	Category	Description	Transaction Number
Sync	Powered by SoftPro	Canceled	Sync-0528001	Default	Nory Pollock	5/28/2019 1:35 PM	Tools	4237 Carriage Dr, Apopka, FL, 32703	410060-70-190528-223996

A provider may also choose to cancel a request that you have submitted to them. As a result, you will receive an email notification and your corresponding transaction will automatically be updated with a **Canceled** status.

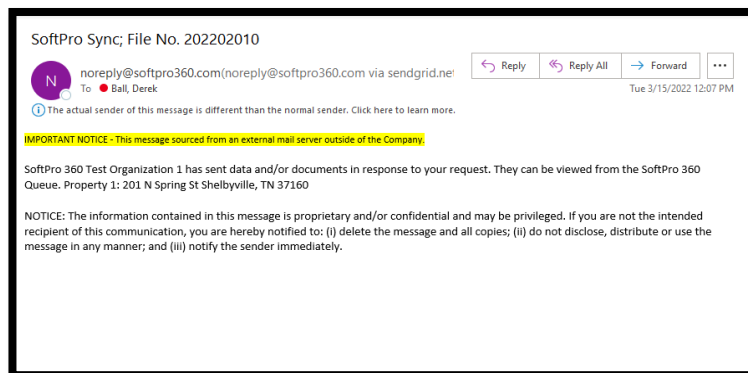
Rejected Request by the Provider

A provider may choose to reject your request once they receive it but before they accept the data into their order. You will receive an email notification with a reason for their rejection and your transaction will be updated with a **Rejected** status.

Receiving Title Search Results

Once the provider completes the title search and successfully sends you the data and documents via 360, the following will occur.



- You will receive an email notification.
- The corresponding transaction in 360 will update to a **Ready** status. Highlighting the transaction and clicking **Next Step** will open the Review screen where you can view this information.



Queue									
	Provider	Service	Status	Linked Order	Linked	Created On	Category	Description	Transaction Number
	Sync	Powered by SoftPro	Ready	Req-S0519-100	Default	5/31/2019 11:14 AM	Tools	4237 Carriage Dr, Apopka, FL, 32703	410060-70-190531-224388

From the Review screen, you can view the title data and documents returned by the title provider and specify those that you want to include in your ProForm 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 overwrite the Current Value when you click **Accept**.
- Notes** – Any comments added by the provider will display here. Check **Add to ProForm Notes** if you want to import it into your ProForm order notes for future reference.

- **Documents** – Displays the documents that you want to attach to your order. The **View** icon  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.
- **Overwrite Requirements/Exceptions** - Overwrites all the requirements and exceptions that currently exist in your order with those returned by the provider when you click **Accept**. Will be checked by default.

Clicking **Accept** will import the data and documents into your order and the following will occur.

- Attempt an order save before writing anything to ProForm.
- Regardless of save, Import data elements into ProForm
- Attempt another save to the order
- If this is an FNF operation, before writing documents, perform a check to see if a SV order exists.
 - If a SV order exists, this is the happy path where everything imports as expected and we are done
 - If a SV order does not exist, put the transaction in a “Ready” status and leave the documents on the transaction so the user can import them later and remove data elements from the data model (review screen)
- If this is an Agency operation,
 - Add the document to Proform attachment
- The transaction status will change to **Accepted** in the 360 queue.

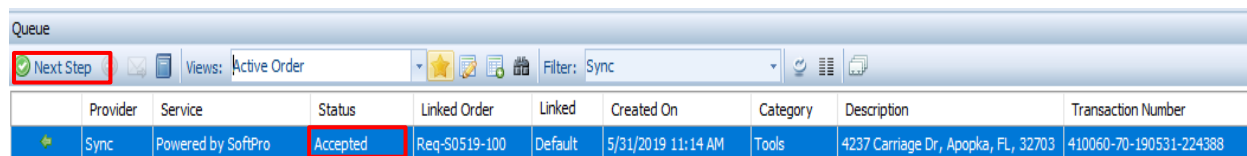
If you decide to not take any action at this time, click **Close** instead. Your transaction’s status will remain **Ready**, and you will be able to return to the **Review** screen at a later time to accept the information.

Queue									
<div>  Next Step   Views: Active Order    Filter: Sync  </div>									
	Provider	Service	Status	Linked Order	Linked	Created On	Category	Description	Transaction Number
	Sync	Powered by SoftPro	Accepted	Req-S0519-100	Default	5/31/2019 11:14 AM	Tools	4237 Carriage Dr, Apopka, FL, 32703	410060-70-190531-224388

Requesting a Bringdown

Specifying Bringdown Data

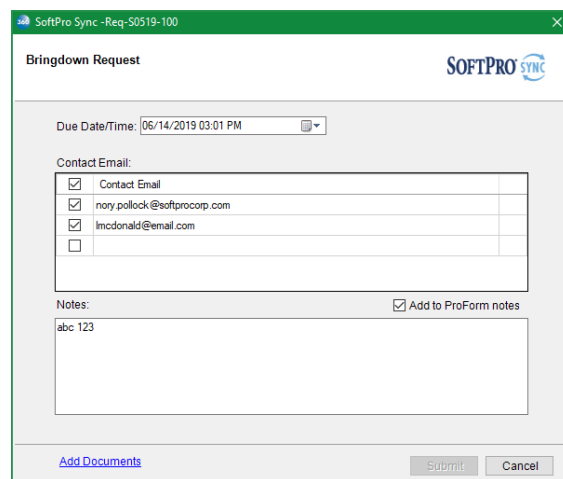
You can request an update to your order if the corresponding transaction has a status of **Accepted**. Highlight the transaction and click **Next Step**. This will open the **Bringdown Request** screen.



The screenshot shows the 'Queue' window with a toolbar at the top. The 'Next Step' button is highlighted with a red box. Below the toolbar is a table with the following data:

	Provider	Service	Status	Linked Order	Linked	Created On	Category	Description	Transaction Number
+	Sync	Powered by SoftPro	Accepted	Req-S0519-100	Default	5/31/2019 11:14 AM	Tools	4237 Carriage Dr, Apopka, FL, 32703	410060-70-190531-224388

- **Due Date/Time** – Select the due date and time you would like to receive the results of your request.
- **Contact Email** – Select the contacts for your request. The same email addresses displayed in the grid for the original submission will be displayed including those that were manually added. Selected contacts will receive email notifications when the results of the bringdown are returned to you via 360.
- **Notes** – Enter instructions about your order. Check **Add to ProForm Notes** to automatically add your notes to your ProForm order upon submitting your request.
- **Add Documents Link** – See the **Adding Documents** section.

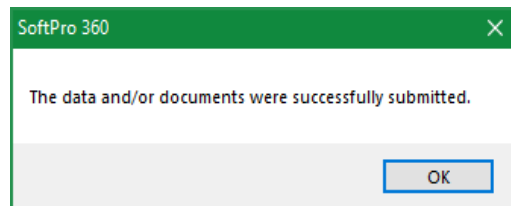


The 'Bringdown Request' dialog box contains the following fields and controls:

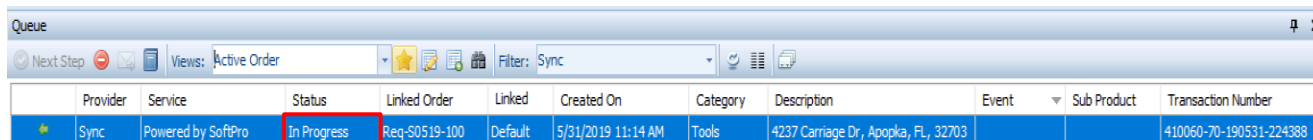
- Due Date/Time:** 06/14/2019 03:01 PM
- Contact Email:** A list of email addresses with checkboxes:
 - ☒ Contact Email
 - ☒ nory.pollock@softprocorp.com
 - ☒ lmcDonald@email.com
 - ☐
- Notes:** A text area containing 'abc 123'. A checkbox 'Add to ProForm notes' is checked.
- Buttons:** 'Add Documents', 'Submit', and 'Cancel'.

Submitting the Bringdown Request

Click **Submit** to send the bringdown details to the title provider. A notification will display once they receive the request. The provider will also receive an email notification that you have sent them a bringdown request. Click **OK** to return to your ProForm order and to track the transaction from the 360 Queue.



The transaction status will update to **In Progress**.



The screenshot shows the 'Queue' window with the same table as before, but the 'Status' column now shows 'In Progress' for the highlighted transaction.

	Provider	Service	Status	Linked Order	Linked	Created On	Category	Description	Event	Sub Product	Transaction Number
+	Sync	Powered by SoftPro	In Progress	Req-S0519-100	Default	5/31/2019 11:14 AM	Tools	4237 Carriage Dr, Apopka, FL, 32703			410060-70-190531-224388

Canceling a Bringdown

Refer to the [Canceling a Request](#) section of this document for guidance on how to cancel a bringdown request.

Rejected Bringdown by Provider

Refer to the [Rejected Request by the Provider](#) section of this document for information on when a provider rejects a bringdown request.

Receiving Bringdown Results

Refer to the [Receiving Title Search Results](#) section of this document for guidance on how to receive and import bringdown results information into your order.

Automation

Automation Training materials can be found through our Help (F1). When on the help page, you can access the following.

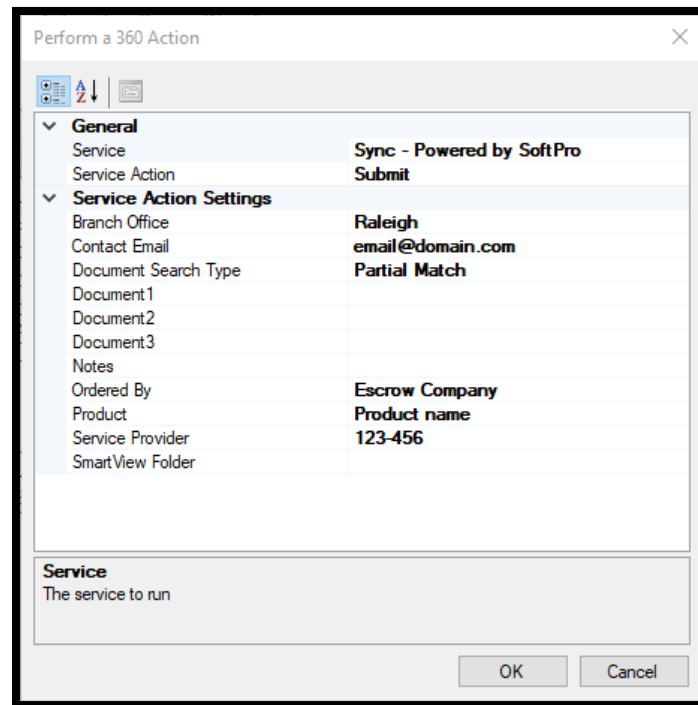
- Job Aides, click on [SPAdmin -> Automation Users Guide](#)
- Videos, click on [SPAdmin -> Automation](#)

Submit Automation

In the Automation Process Wizard at the Then do the Following, check **Perform a specific 360 action**.

Under **Here's your rule so far**, click on the word **Specific** to perform a specific 360 action for Sync powered by Softpro for a Submit Order. The following information is needed.

- Service Action – Submit
 - Branch Office
 - Enter the Branch office associated with the Service Provider
 - Contact Email
 - Enter Contact Email
 - Document Search Type
 - Drop down selection of Partial or Actual
 - Document1, Document2, or Document3
 - Enter document name to retrieve from Attachments
 - Notes
 - Text Field to enter Note or enter 360 Field Code. Ex; Order.Note[n].Content
 - Ordered By
 - Drop-down selection of; Escrow Company, Settlement Agent, Title Company, Underwriter, and Attorney
 - Product
 - Enter a Product offered by the Branch Office of the Service Provider
 - Service Provider
 - Enter the SoftPro Serial number for the Service Provider. Format as XXX-XXX
 - SmartView Folder
 - Enter the SmartView Folder Path



The "Perform a 360 Action" dialog box is shown. It has a title bar with a close button. Below the title bar is a toolbar with icons for undo, redo, and help. The main area is divided into two sections: "General" and "Service Action Settings".

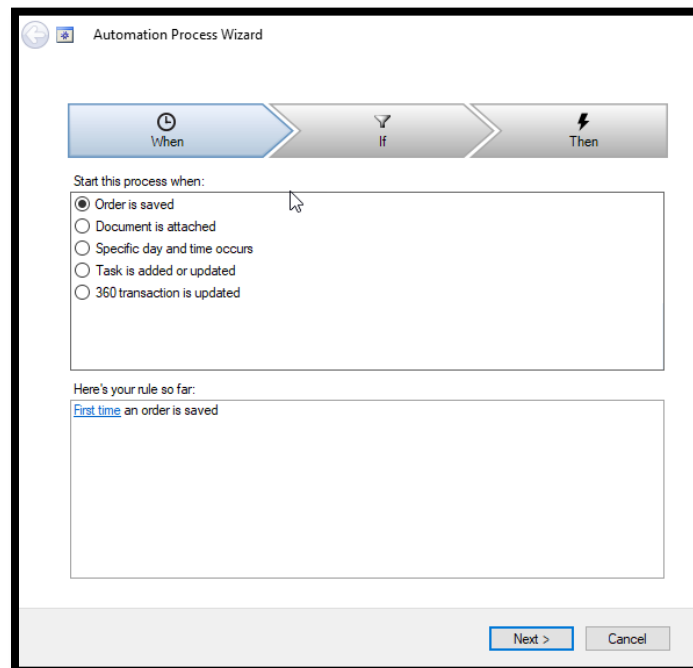
General	
Service	Sync - Powered by SoftPro
Service Action	Submit

Service Action Settings	
Branch Office	Raleigh
Contact Email	email@domain.com
Document Search Type	Partial Match
Document1	
Document2	
Document3	
Notes	
Ordered By	Escrow Company
Product	Product name
Service Provider	123-456
SmartView Folder	

Below the settings table is a "Service" section with the text "The service to run". At the bottom right are "OK" and "Cancel" buttons.

Accept Automation

Launch the Automation Process Wizard



The "Automation Process Wizard" dialog box is shown. It has a title bar with a back button and a help button. Below the title bar is a progress bar with three steps: "When", "If", and "Then". The "When" step is currently selected and highlighted in blue.

Start this process when:

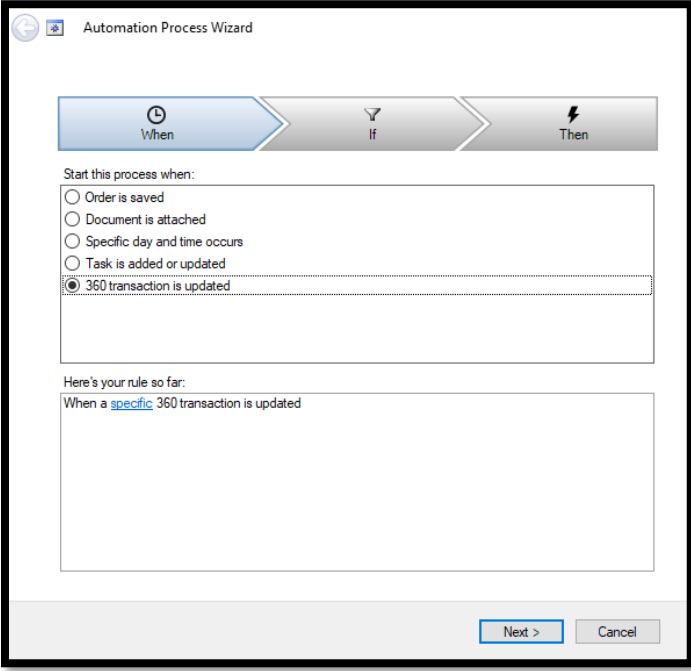
- ☒ Order is saved
- ☐ Document is attached
- ☐ Specific day and time occurs
- ☐ Task is added or updated
- ☐ 360 transaction is updated

Here's your rule so far:

[First time](#) an order is saved

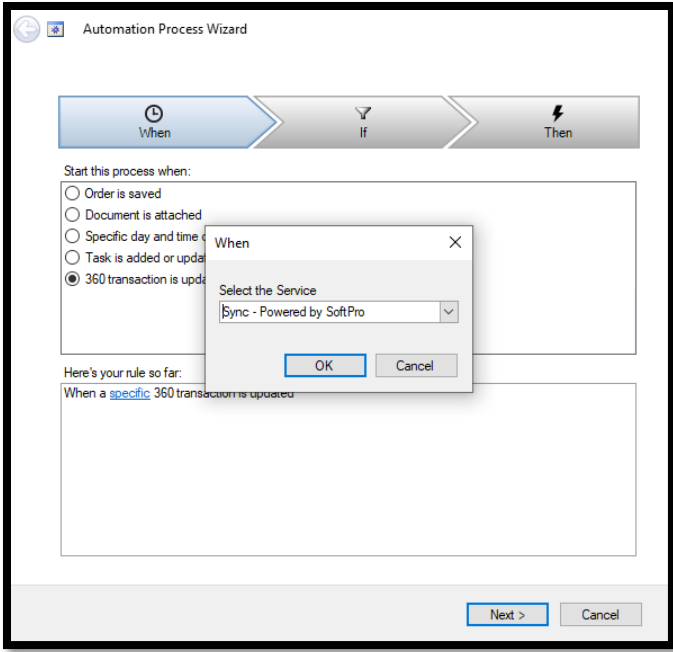
At the bottom right are "Next >" and "Cancel" buttons.

In the Automation Process Wizard, at the Start this process when, select 360 transaction is updated.



The screenshot shows the 'Automation Process Wizard' window. At the top, there are three tabs: 'When' (selected), 'If', and 'Then'. Below the tabs, the 'Start this process when:' section contains a list of options: 'Order is saved', 'Document is attached', 'Specific day and time occurs', 'Task is added or updated', and '360 transaction is updated' (which is selected with a radio button). Below this list, the 'Here's your rule so far:' section displays the text 'When a specific 360 transaction is updated'. At the bottom right, there are 'Next >' and 'Cancel' buttons.

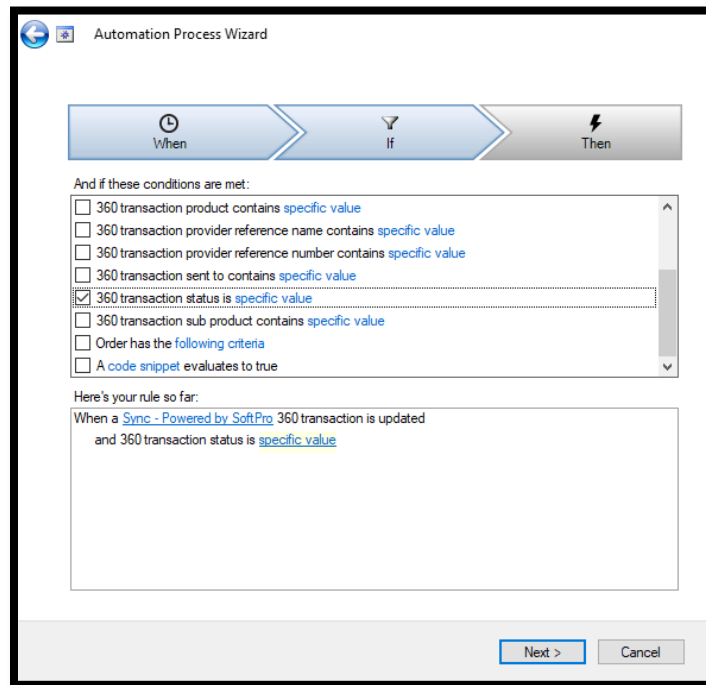
Under **Here's your rule so far**, click on the word **specific** in When a specific 360 transaction is updated. At the **Select the Service**, choose the drop down and select **Sync-Powered by SoftPro**.



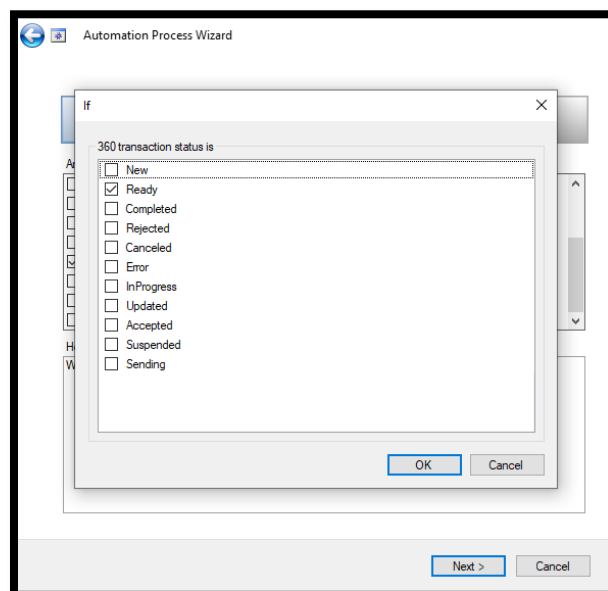
This screenshot shows the same 'Automation Process Wizard' window as before, but with a 'When' dialog box open. The dialog box has a title bar 'When' and a close button 'X'. It contains a section 'Select the Service' with a dropdown menu that has 'Sync - Powered by SoftPro' selected. There are 'OK' and 'Cancel' buttons at the bottom of the dialog. The background window shows the same 'Start this process when:' and 'Here's your rule so far:' sections, with the '360 transaction is updated' option selected and the rule text 'When a specific 360 transaction is updated'.

Click **OK**, then **Next**.

At the **And if these conditions are met**, check 360 transaction status is **specific value**

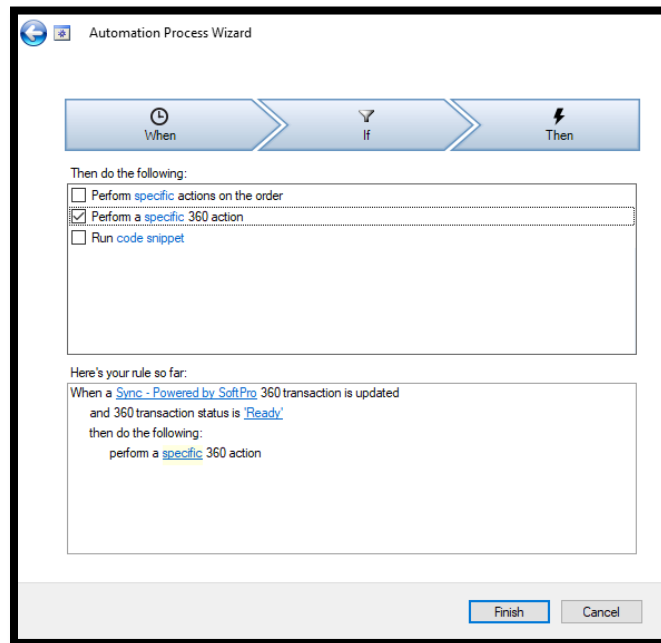


Under **Here's your rule so far**, click on the word **specific value** and in the **360 transaction status is** window, select **Ready**.



Click **OK**, then **Next**.

At the Then do the following, select Perform a **specific** 360 action



Under Here's your rule so far, click on the word **Specific** to perform a specific 360 action for Sync powered by Softpro Accept. The following information is needed.

- Service Action
 - Drop-down option for Accept
- Accept Data
 - Drop-down option
 - Accept Data – default selection
 - No Action
 - Over Write Data
- Accept Documents
 - Drop-down option
 - Accept Documents – default selection
 - No Action
- SmartView Folder Path
 - Enter the SmartView Folder Path

