SOFTPRO 360

Sync User Guide
For Title Search Requests

March, 2022

4800 Falls of Neuse Road, Suite 600 | Raleigh, NC 27609

p (800) 848–0143 | f (919) 755–8350 | www.softprocorp.com

Copyright and Licensing Information

Table of Contents

History

Date	Version	Details
3/22	V2	• Submitting the Request - Document Note Functionality • Receiving Title Search Results – Email Functionality • Submit Automation • Accept Automation
6/11/2019	V1	• 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.
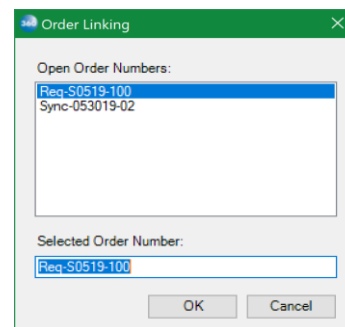
Launching Sync

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:
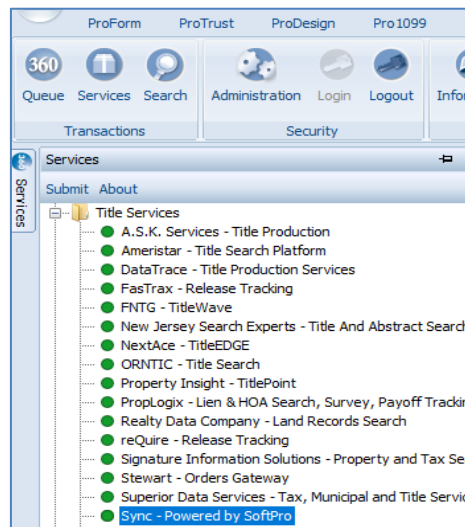
Linking a ProForm Order

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.
  - o 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.
  - o You must know the provider's serial number, and they must be registered with SoftPro as a valid title provider for Sync.
  - o 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.
  - o 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.
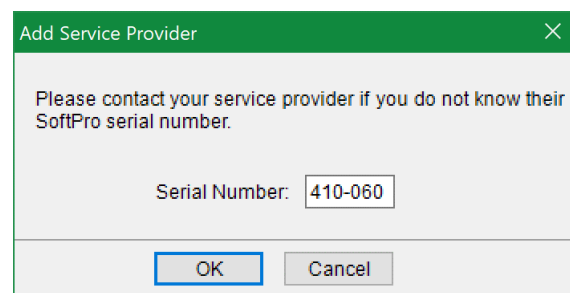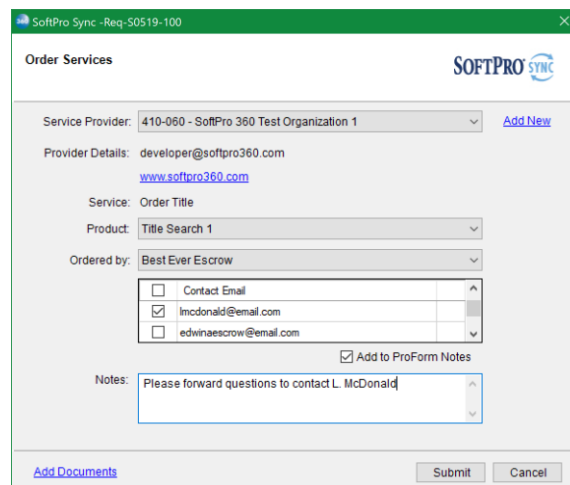
- o   Your 360 user email address will be selected by default.
- o   You can add an email address by entering it in the last line of the grid next to the checkbox with no contact.
- **Notes** – Manually add instructions or comments about your order. Check **Add to ProForm Notes** to automatically add 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.
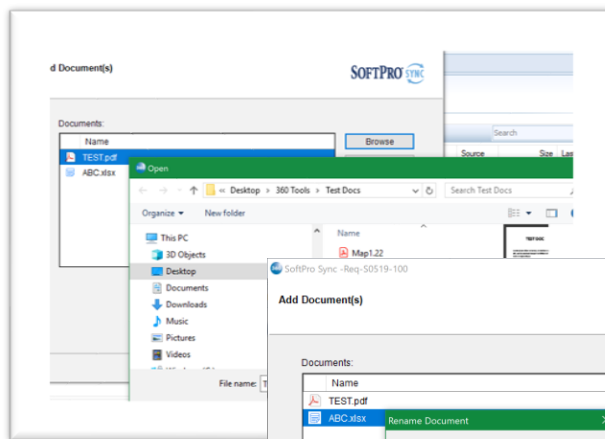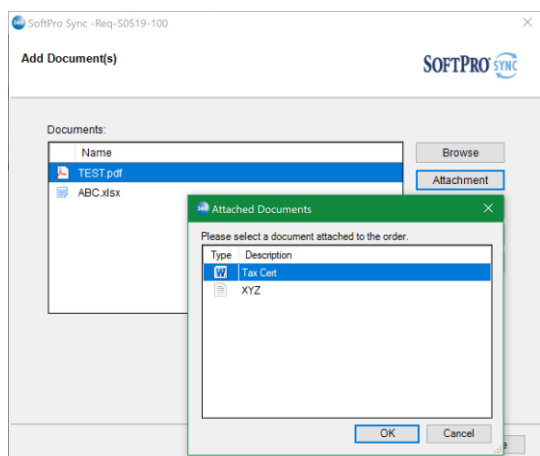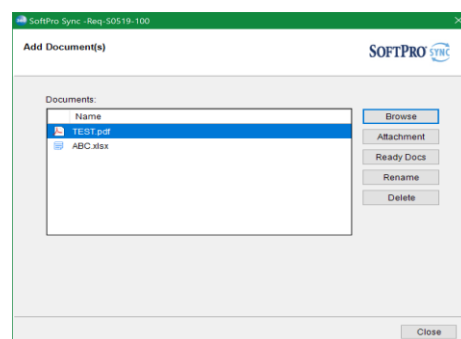

You can also **rename** or **delete** any attachment by selecting the document and performing the desired action.

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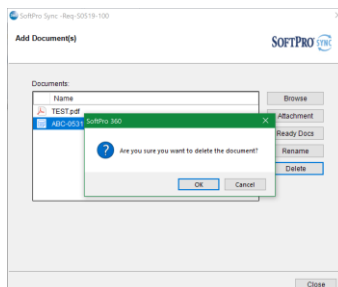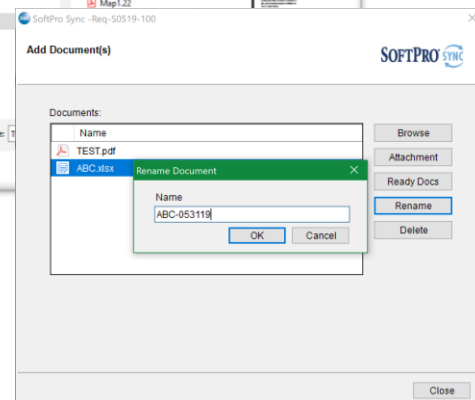
Submitting the Request

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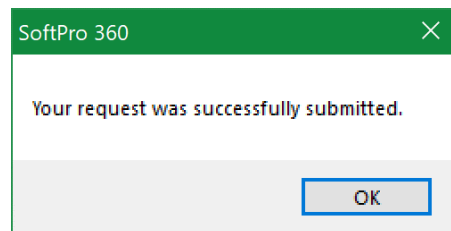
When an order is submitted successfully to the provider the following occur.

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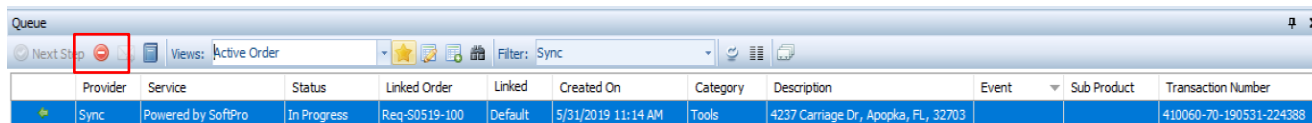
- When a document is submitted, a Note will be saved to the Order with the following information.
    - Note Format:
        - Sync Powered by SoftPro
        - Sent to: S/N & Provider Name
        - Product Request: Product ordered by the provider
        - Documents: List of documents sent
       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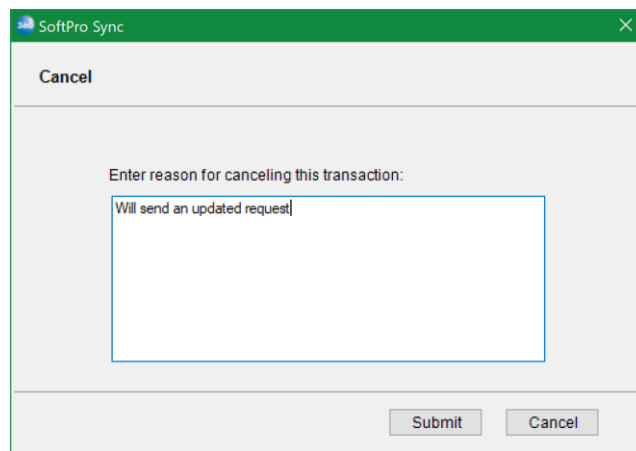
Canceling a Request

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.

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

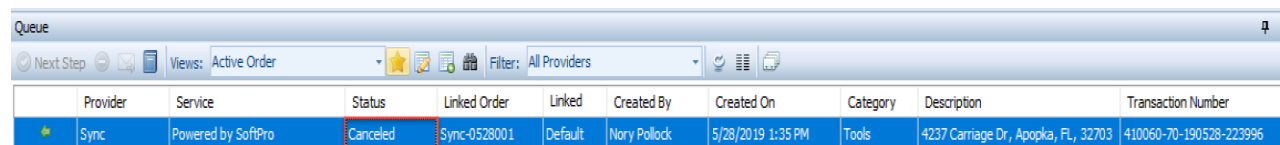The transaction status in your queue will update to **Canceled** as will the status of the provider's transaction.

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.
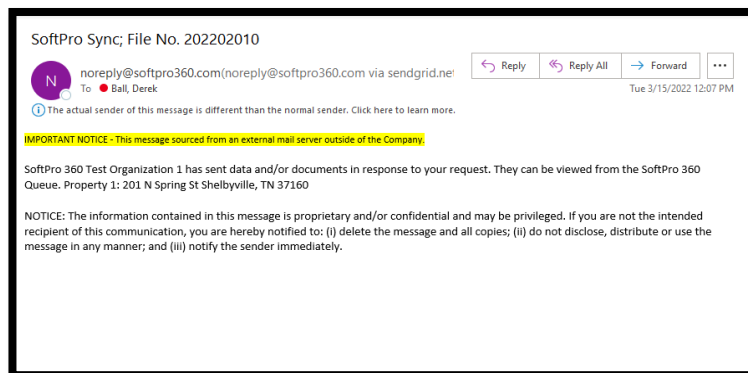
Rejected Request by the Provider

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.

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.

  o If a SV order exists, this is the happy path where everything imports as expected and we are done

  o 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,

  o Add the document to Proform attachment

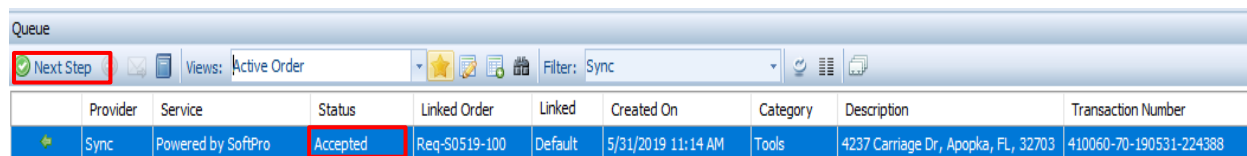- The transaction status will change to **Accepted** in the 360 queue.

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.

	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
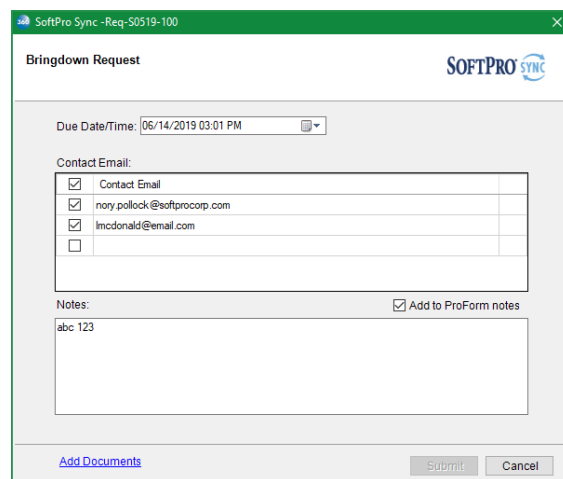
Specifying Bringdown Data

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.

- **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.
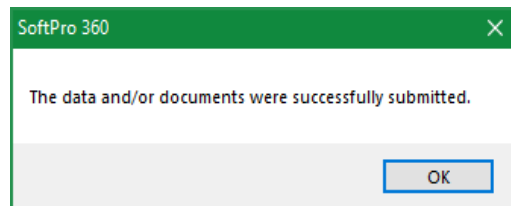- **Add Documents Link** – See the **Adding Documents** section.
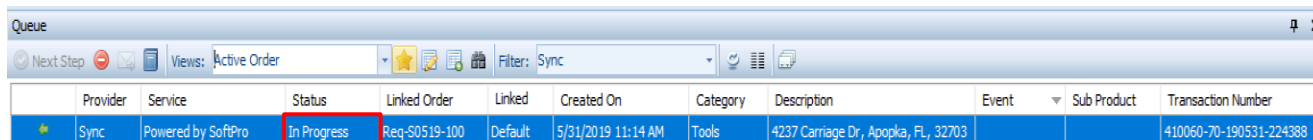
Submitting the Bringdown Request

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**.

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.
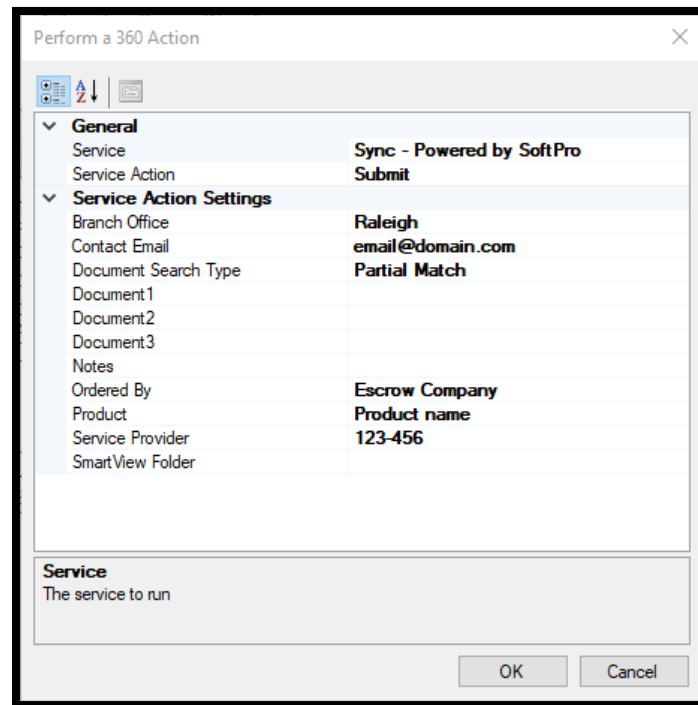
- o Job Aides, click on SPAdmin -> Automation Users Guide
- o Videos, click on SPAdmin -> Automation

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

Accept Automation

Launch the Automation Process Wizard

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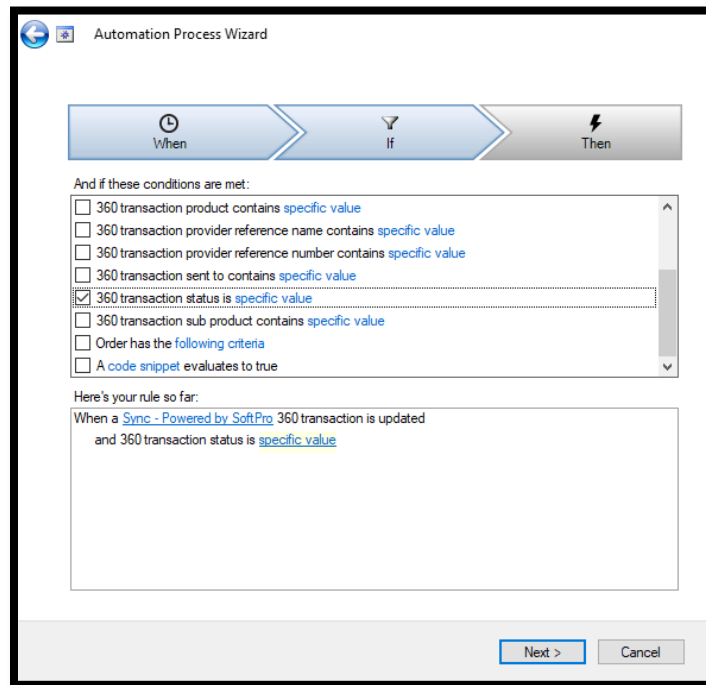

Under **Here's your rule so far**, click on the word **specific** in When a specific 360 transaction is updated. At the **Select the Service**, choose the drop down and select **Sync-Powered by SoftPro**.
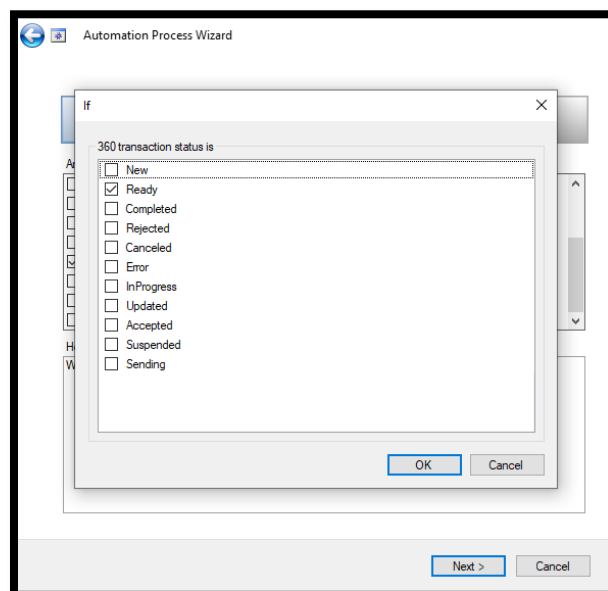
Click **OK**, then **Next**.

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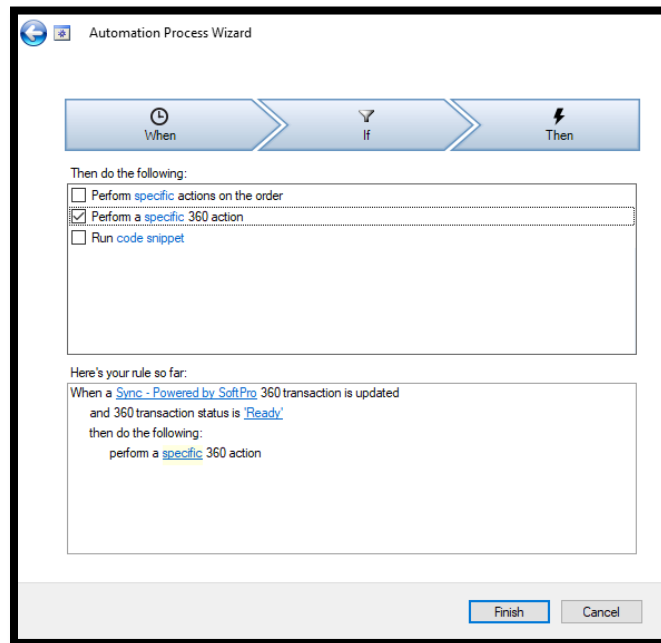

Under **Here's your rule so far**, click on the word **specific value** and in the **360 transaction status is** window, select **Ready**.

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