TitlePort
User Guide

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Introduction

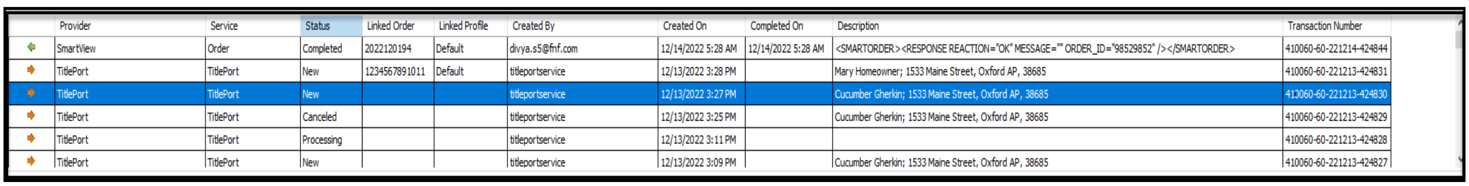
The SoftPro 360 integration with TitlePort provides the ability to receive Title and Escrow order requests from, and to send information and documents back to, TitlePort customers. In addition to accepting order requests, a new order can be created with data seamlessly flowing into ProForm increasing productivity, efficiency and removing data re-entry.

The vendor exists in the 360 Services menu, however, the user will get the following message if they attempt to use the launcher: "This is not a valid operation. Please open from Transaction Queue."

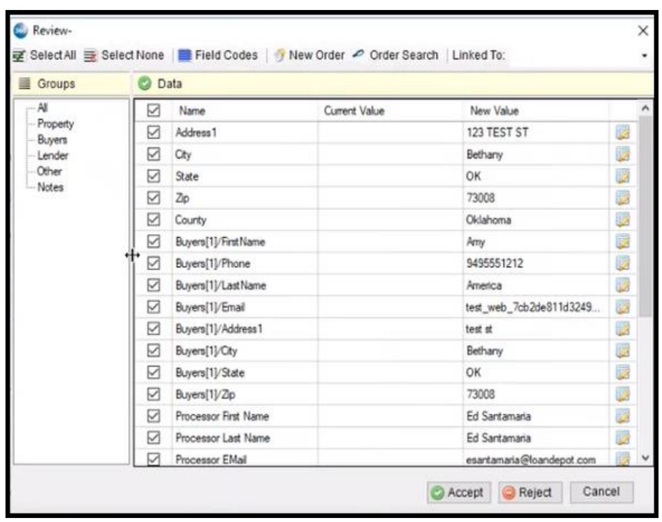
Accessing New orders in the SoftPro 360 Queue

New orders sent from TitlePort will appear in the SoftPro 360 queue under the 'New Transactions' 'View' as a single transaction. The Service column will reflect 'TitlePort', and the 'Status' column will reflect 'New'. The 'Description' column will indicate the Borrower's Name and Property Address.

To review a new transaction, highlight the transaction, then click the Next Step button at the top left of the Queue toolbar. The 'Review" screen (sample shown below) will be presented.

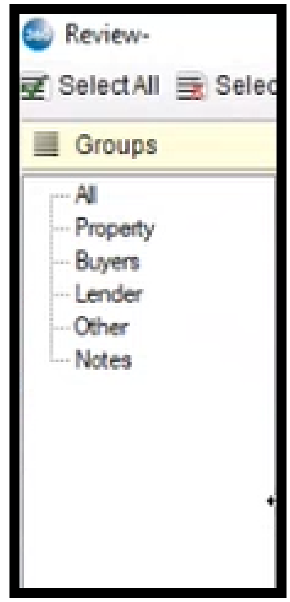


The 'Review' screen will display all the data, notes, and documents sent from TitlePort to SoftPro 360. The data should be reviewed carefully before acceptance.

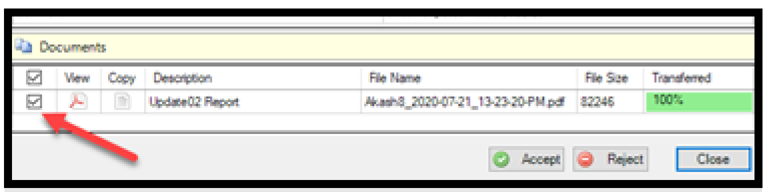


All data with a checkmark in the check box in front of the data field name will be accepted into a ProForm order. By default all check boxes are checked. The incoming data sent from TitlePort will be displayed under the 'New Value' column. The 'Current Value' column displays data that is currently in the order – if the transaction has already been linked to an order. The check box in front of the 'Name' column header will, if checked, check all fields in the listing; if unchecked, all fields below will be unchecked. The 'Select All' and 'Select None' buttons, at the top of the screen, under the 'Review' banner, have the same affect.

The incoming values are also broken down into 'Groups'. The 'Groups' are listed in a tree-view on the left side of the screen. A specific 'Group', such as 'Buyers', can be expanded (by clicking on it) so that only the new incoming values for that group are viewed. The default 'Group' selection is 'All', which will present all the data being presented for the order.



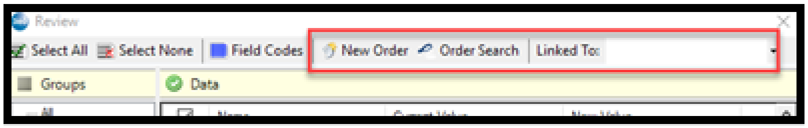
If the new order has a document attached to it, an indication to that effect will appear at the bottom portion of the screen. To view a document, click the 'PDF' icon in the 'View' column. To copy a document to the clip board, click the 'Copy' icon in the 'Copy' column. The document(s) will be pushed to the Attachments/Document History for Select.



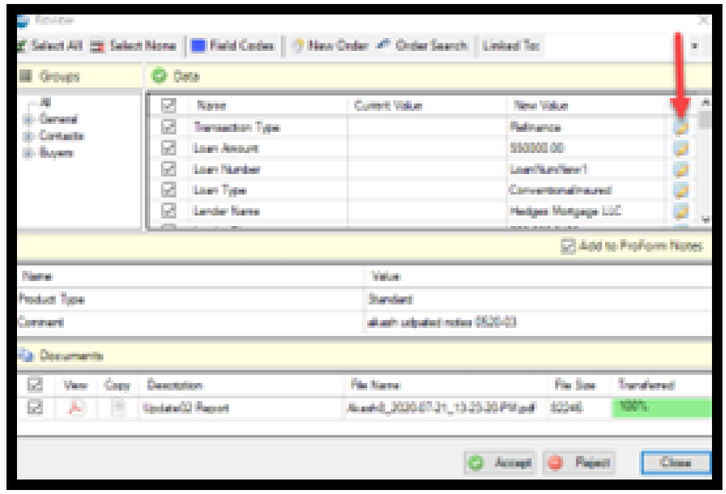
Linking the Transaction to a ProForm Order

There are three options to attach the data into a ProForm order: Create a New Order, Search for an order, or Linking To an order that is currently opened in ProForm.

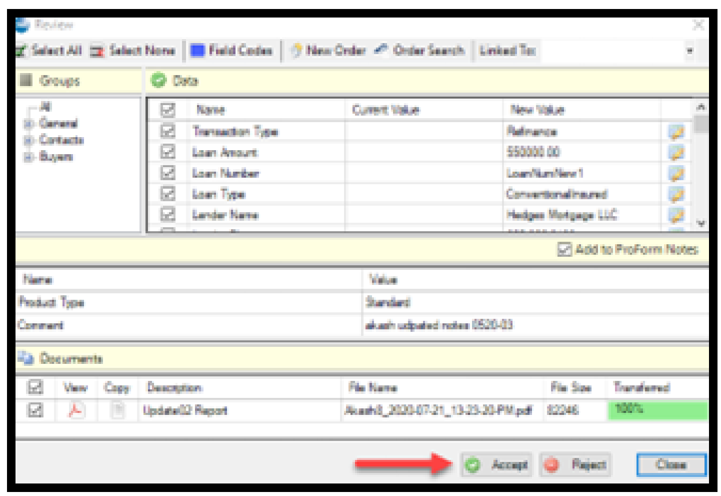
- Click the 'New Order' button to open the 'ProForm New Order' screen. Once the New Order information (Prefix, Suffix, Order Number, Trust account and template) has been entered click 'OK'. Clicking 'OK' will place the new order number into the 'Linked To' field on the 'Review' screen.
- Click the 'Order Search' button to open the 'ProForm Order Search' screen. Highlight and double click the desired order number. The chosen order number will be placed into the 'Linked To' field on the 'Review' screen.
- If the ProForm order that the data should be entered into is already open, click the 'Linked To' drop down and select the ProForm order number.



Once the ProForm order number has been selected and is displayed in the 'Linked To' field of the Review screen, the user will see any existing data presented in the 'Current Value' column. The user should review the 'Current Value' and 'New Value' entries before accepting the order. Should a change need to be made to a 'New Value', before acceptance, the 'Edit' icon to the right of each data line can be clicked to open the 'Edit New Value' screen.



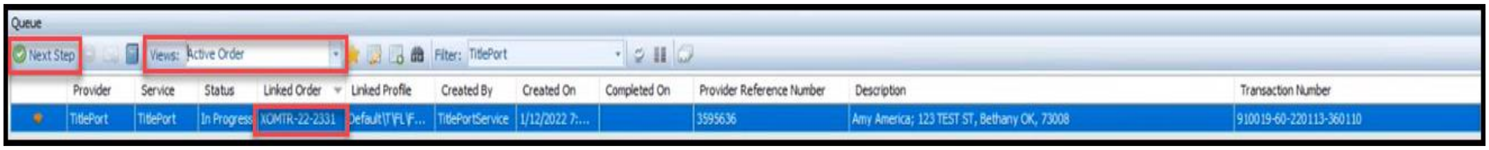
After reviewing the data, and editing as needed, the user can click on the ' Accept' button, at the bottom of the screen, to pull the 'New Value' data into the linked order. Once accepted, the transaction status in SoftPro 360 will update to 'In Progress'.



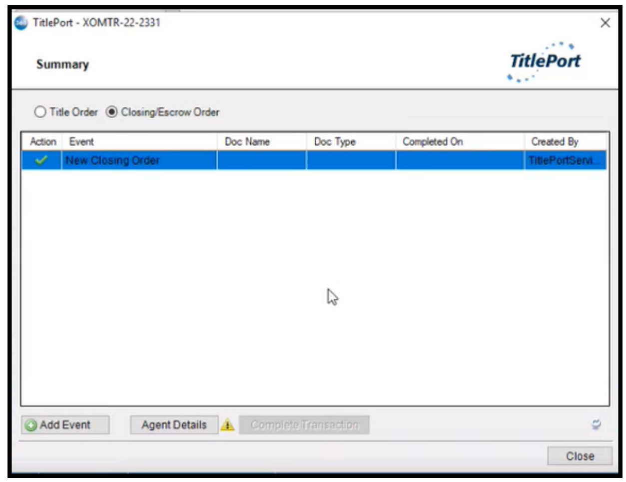
NOTE: The order can be rejected by clicking the ' Reject' button at the bottom of the 'Review' screen. Transactions that are rejected will be displayed in the SoftPro 360 queue as 'Rejected' with no further action being available to the transaction. TitlePort and the lender will be notified that the order was rejected.

Updating a TitlePort Transaction

To access the ‘In Progress’ transaction to send a communication, change the SoftPro queue ‘View’ to ‘Active Order’ (if the linked order is open in the user’s SoftPro Select) or ‘In Progress’ and highlight the order to be worked. To update the transaction, highlight it and click the ‘ Next Step’ button.



The ‘Summary’ screen will be displayed. This screen will show all the events that have occurred for the transaction. In the screen shot below, the receipt of the order is the sole event presented. In the event you had more than more order, the ‘Summary’ screen is separated into two sections: “Title Order” and “Closing/Escrow Order”.

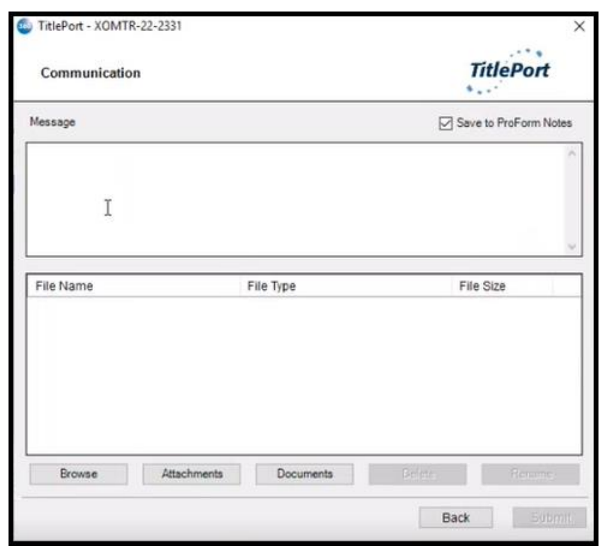


Click the ‘Add Event’ button to open the ‘Communication’ screen (shown below). The user can type a message. Below

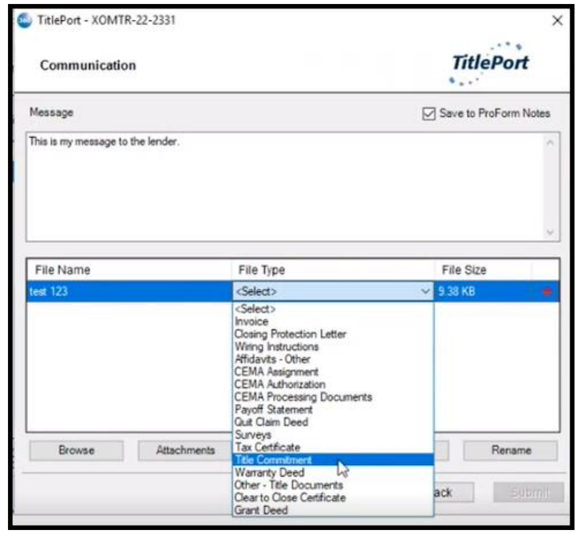
To select a document:

1. Click the ‘Browse’ button to retrieve documents from the user’s local computer
2. Click the “Attachments” button to retrieve documents from the user’s SmartView Document Attachments
3. Click the “Documents” button retrieve documents from the user’s SoftPro Order documents

The user can “Delete” (i.e delete from this list of documents being sent to TitlePort) or “Rename” the files as desired by clicking on the respectively named buttons

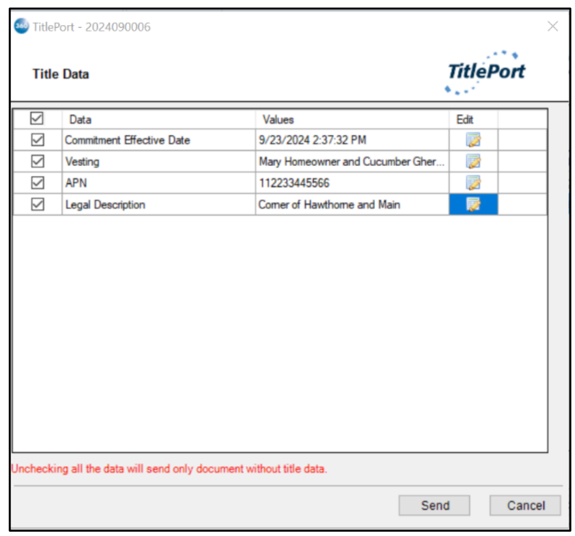


The column to the right of the 'File Name' is used to select the type of document being sent. By clicking on the down arrow, the user is presented a list of document types, from which the appropriate selection should be made. This is a required field, as indicated by the red asterisk.



The document description will default to the name of the communication selected but can be modified – by clicking on the 'Rename' button. If the wrong document was selected, it can be removed by clicking on the 'Delete' button.

If the file type Title Commitment is selected, the Title Data screen is displayed. The data elements on this screen are required if they are selected. Data elements not selected will not be sent with the title commitment request.



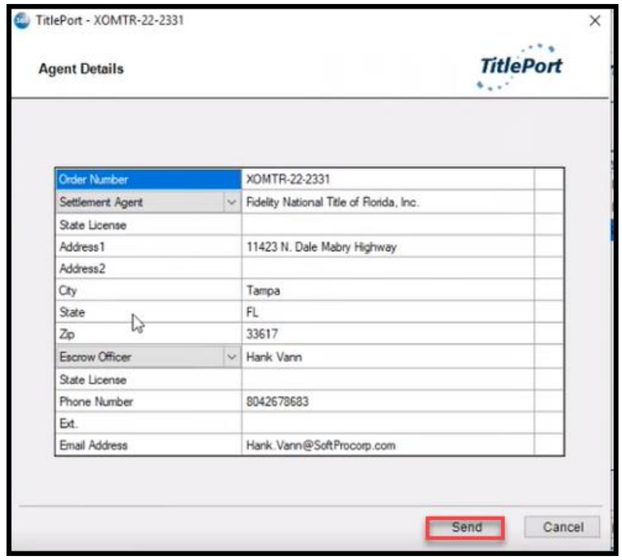
The data elements on the Title Data screen are sourced from the linked order but can be updated manually by clicking the Edit button on the appropriate row. Data edits on this screen will not be carried back to the order.

Data elements are mapped as follows:

- **Commitment Effective Date**
  Title / Commitment – Schedule A / Effective Date/Time
- **Vesting**
  Title / Commitment – Schedule A / Ownership Interest / "interest in the land described…"
- **APN**
  General / Property / APN/Parcel ID
- **Legal Description**
  Property / Escrow Legal

Select and edit data elements as necessary, then press Send.

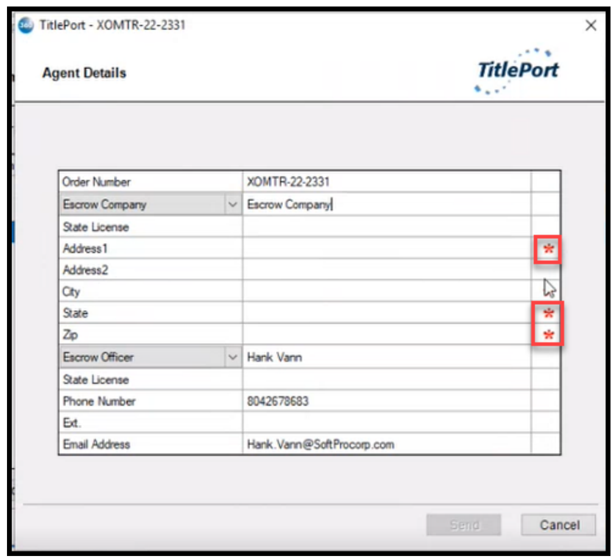
There will be a yellow awareness icon ( ) next to the button “Agent Details” indicating those details need to be sent over. Clicking on the ‘Agent Details” button will display the ‘Agent Details’ screen with all related data from the SoftPro ProForm Select Order.



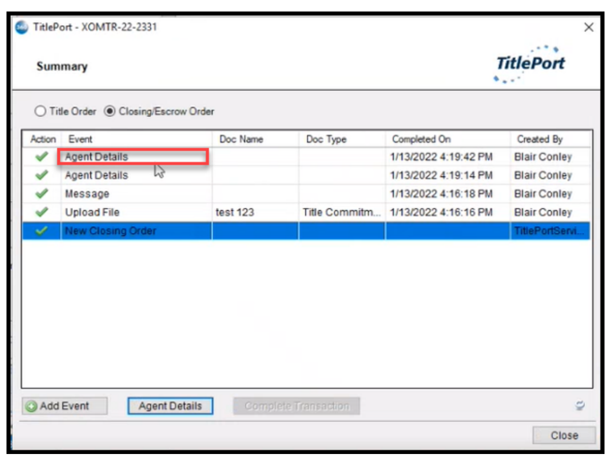
The user can click the down arrow next to ‘Settlement Agent’ to select ‘Title Company’ or ‘Escrow Company’ as needed and the user can click the down arrow next to ‘Escrow Officer’ to select ‘Escrow Assistant’ or ‘Title Officer’ as needed. Only one option can be selected respectively.

Users can add or edit text as needed next to each item by clicking in the respective field second column. Any data added or edited will not map back to the user’s ProForm Select Order.

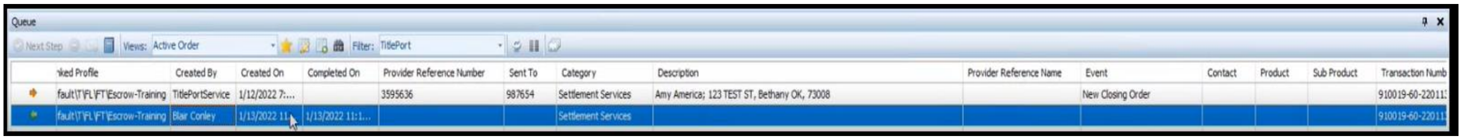
Any field that is required will have a red asterisk on the further right hand column to indicate it needs to be filled in before the ‘Send’ button will enable



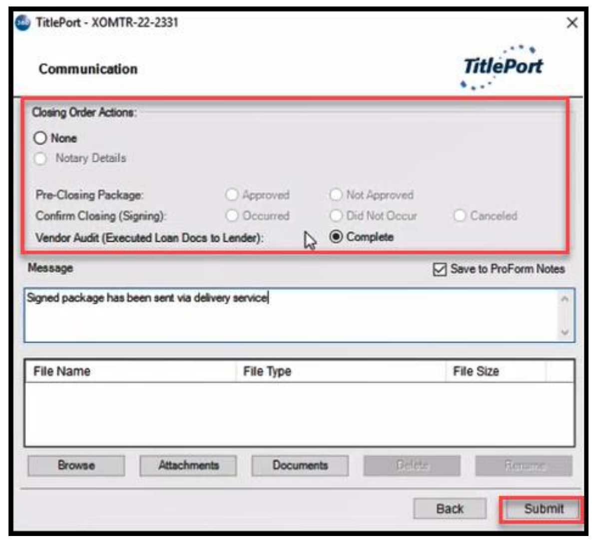
Once ‘Send’ is clicked, the user will be routed back to ‘Summary’ screen with the event “Agent Details” listed and the yellow awareness icon ( ) will no longer display.



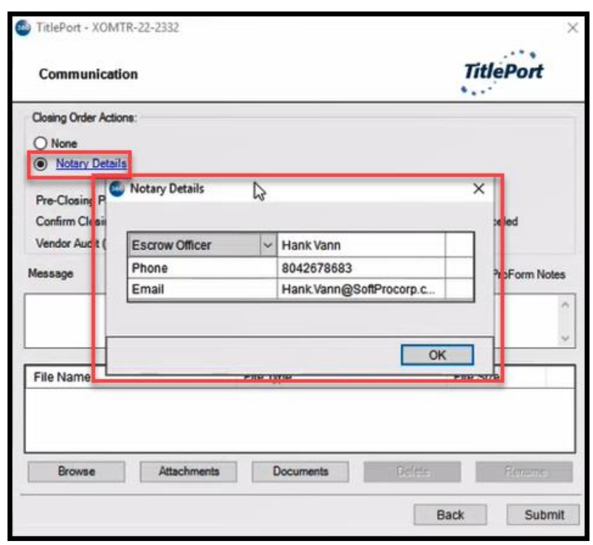
If no further communications is to be sent with the order at this time, click on the ‘Close’ button which will navigate the user back to the ‘360 Transaction Queue’ The order will reflect a ‘Status’ of ‘Completed’ in the 360 Queue.



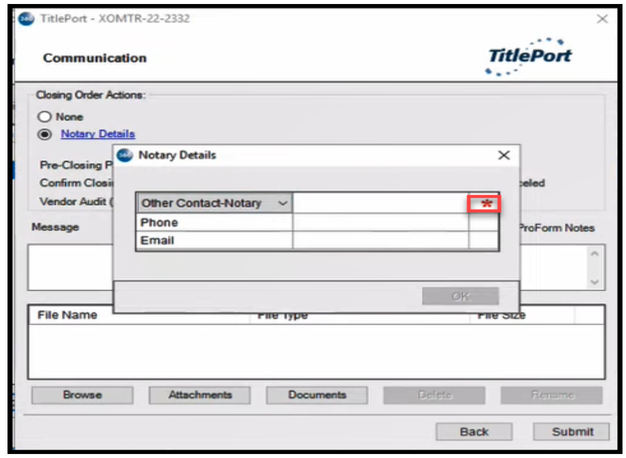
Once ‘Agent Details’ is sent, when adding a new event via the same above process, the user will have the ability to include ‘Closing Order Actions’. If settings are greyed out, it is based on the user’s organization settings.



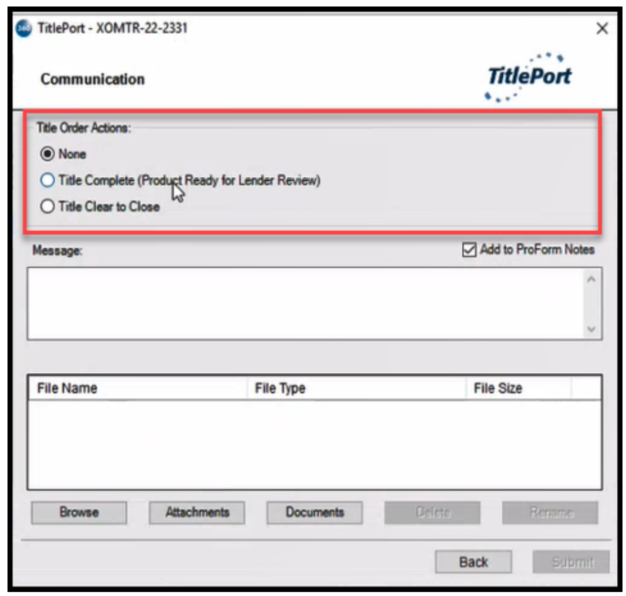
‘Notary Details’ will be a hyperlink that upon clicking will display different contact details from your ProForm order such as ‘Escrow Officer’, ‘Escrow Assistant’, ‘Notary Screen’, and ‘Other Contact-Notary’.



If any of the contact details are not completed, a red asterisk (*)will display next to the details indicating it is a required field and the user can click into the field and type in the information to resolve accordingly.

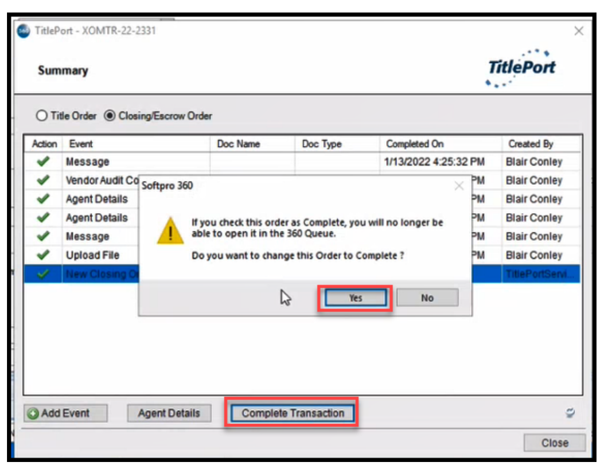


Lastly, if the order was a 'Title Order', the actions when interacting with the order would include 'None', 'Title Complete (Product Ready for Lender Review)', and 'Title Clear to Close'. You would be able to navigate to this screen by clicking the 'Add Event' button on the 'Summary' screen while the 'Title Order' radio-button is checked.

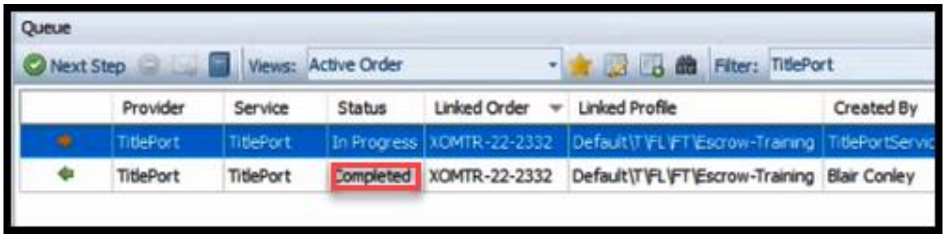


Completing a TitlePort Transaction

Once the user clicks 'Submit', the user will be navigated back to the 'Summary' screen. Here, the user can decide to 'Complete' a transaction by clicking 'Complete Transaction'. Once clicked, a pop-up window will display confirming you want to move the transaction status to 'Complete', therefore preventing any further actions to be taken on the order.



The ‘Order Complete’ event will send that notice to TitlePort and no further communications can be sent on the order. The order will reflect a ‘Status’ of ‘Completed’ in the 360 Queue.



If you decide to click “Reject” when the inbound order comes, the ‘Order Rejected’ event will send that notice to TitlePort and ***no further communications can be sent*** on the order. The order will reflect a ‘Status’ of ‘Rejected’ in the 360 Queue.