

Guide to Auto-Generating and Publishing Documents

Several automation processes have been implemented in SoftPro Select to assist in generating and publishing commonly created documents to Smartview.

A list of the common documents can be found below. Your operation may/may not have designated all of these documents to be auto-generated/published. Reach out to your management to determine what documents have been included.

Use the links to review what data is needed in the order to initiate the automation process.

- › [Affidavit \(Free and Clear – No Deed of Trust\)](#) – Published for Title only refinance transaction when commitment is issued (has an effective date).
- › [Affidavit \(Lien – Parties in Possession But Not of Record\)](#) – Published for Title only refinance transaction when commitment is issued (has an effective date).
- › [Agreement \(Errors and Omissions Compliance\)](#) – Published for Title only refinance transaction when commitment is issued (has an effective date).
- › [Commitment Approval](#) – Published when commitment is issued (has an effective date).
- › [Letter \(Purchase Insured Explanation\)](#) – Published for purchase transaction when commitment is issued (has an effective date).
- › [Open Order Sheet with Notes](#) – Published when the order is created/saved for the first time.
- › [Privacy Statement](#) – Published when commitment is issued (has an effective date).
- › [Wire Fraud Alert Notice](#) – Published when the order is created/saved for the first time.

IMPORTANT: The documents listed above are auto-generated/published to Smartview upon your **first** save **and** exiting of the order. Documents requiring an update must be **manually** generated and published via the **Documents** tab.

All of the above documents are saved to and can be viewed on the **Attachments** screen in SoftPro Select. If multiple Smartview orders match the Select order number, the automation process looks to the matching Office ID with the **Ownership Profile** to publish to Smartview. Verification of the upload to Smartview can be done by accessing the corresponding Smartview order.

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Triggering the Automation Process

When Automation Begins: The automation process looks at the order creation date (**Date/time escrow opened** field) to run automation. If the order creation date is prior to the tool configuration date, automation is not run.

Escrow Status

Date/time escrow opened: 10/03/2024 09:47 AM

Your operation's management determines the configuration date which will be communicated when made available.

Process: Affidavit (Free and Clear – No Deed of Trust)

1. Verify the following requirements are present in the order:

a. **Transaction type = Refinance**

Transaction type	<input type="radio"/> Purchase <input checked="" type="radio"/> Refinance	<input type="checkbox"/> Commercial <input type="checkbox"/> Construction <input type="checkbox"/> Cash sale <input type="checkbox"/> Out of country	Order type: Title only
			Product type: Refinance

b. **Order type = Title only**

c. Contacts entered for:

i. **Settlement Agent** Contact – must be pulled from the Lookup Table

Settlement Agent	
Settlement Agent	
Lookup code:	FNM-0050
Name:	Fidelity National Title of New Mexico Inc.

ii. **Buyer/Borrower** Contact – **Name** must be populated

Buyer/Borrower																
Buyer/Borrower																
<input checked="" type="radio"/> Individual <input type="radio"/> Organization Type: Male																
Split Contact																
Name(s):	<table border="1"> <tr> <th>First</th> <th>Middle</th> <th>Last</th> <th>Suffix</th> <th>Relationship</th> </tr> <tr> <td>Bradley</td> <td></td> <td>Borrower</td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </table>	First	Middle	Last	Suffix	Relationship	Bradley		Borrower							
First	Middle	Last	Suffix	Relationship												
Bradley		Borrower														
Name:	Bradley Borrower															
Payee name:	Bradley Borrower															

d. **Escrow Office** code is populated

Settlement and Title Office

Escrow office: A Fidelity National... Escrow officer/Closer: Emily Escrow

e. **Escrow Officer** is selected

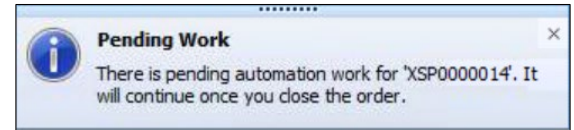
f. **Commitment Effective Date** is populated

Commitment - Schedule A	
Effective Date:	09/12/2024

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2. Save the order

A **Pending Work** notification is displayed. The message states,
There is pending automation work for 'your order number'. It will continue once you close the order.



3. Exit the order to complete the process

When all conditions are met, upon your **first** save **and** exiting the order, the document is created and uploaded to the orders Smartview folder.

Process: Affidavit (Lien – Parties in Possession But Not of Record)

1. Verify the following requirements are present in the order:

- a. **Transaction type = Refinance**
- b. **Order type = Title only**
- c. Contacts entered for:
 - i. **Settlement Agent** Contact – must be pulled from the Lookup Table
 - ii. **Buyer/Borrower** Contact – **Name** must be populated
- d. **Escrow Office** code is populated
- e. **Escrow Officer** is selected
- f. **Property address 1, City, State, Zip code** and **County** are populated

Property address:	<input type="text" value="123 Main Street"/>		
City:	<input type="text" value="Albuquerque"/>	State: <input type="text" value="NM"/>	Zip Code: <input type="text" value="87110-"/> <input type="checkbox"/> Foreign
In the:	<input type="text" value="County"/>	of <input type="text" value="Bernalillo"/>	County GLC: <input type="text" value="001"/>

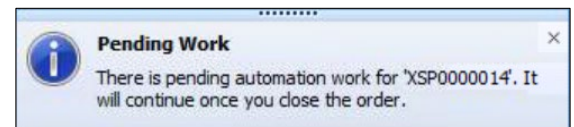
- g. **Escrow Brief Legal** is entered

Escrow Brief Legal	
Lookup code:	<input type="text" value="Lot"/>
<input type="text" value="Lot(s): 235 ; Block: 16"/>	

- h. **Commitment Effective Date** is populated

2. Save the order

A **Pending Work** notification is displayed. The message states,
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3. **Exit** the order to complete the process

When all conditions are met, upon your **first** save **and** exiting the order, the document is created and uploaded to the orders Smartview folder.

Process: Agreement (E&O)

1. Verify the following requirements are present in the order:
 - a. **Transaction type = Refinance**
 - b. **Order type = Title only**
 - c. Contacts entered for:
 - i. **Settlement Agent** Contact – must be pulled from the **Lookup Table**
 - ii. **Buyer/Borrower** or **Seller** Contact – **Name**



Buyer/Borrower

☒ Individual ☐ Organization Type: Male Split Contact

Name(s):	First	Middle	Last	Suffix	Relationship
Bradley Borrower	Bradley		Borrower		

Name: Bradley Borrower

Payee name: Bradley Borrower

Vesting:

- d. **Escrow Office** code is populated
- e. **Escrow Officer** is selected
- f. **Property address 1, City, State, Zip code** and **County** are populated
- g. **Escrow Brief Legal** is populated
- h. **Commitment Effective Date** is populated

2. **Save** the order

A **Pending Work** notification is displayed. The message states, *There is pending automation work for 'your order number'. It will continue once you close the order.*

3. **Exit** the order to complete the process

When all conditions are met, upon your **first** save **and** exiting the order, the document is created and uploaded to the orders Smartview folder.

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Process: Commitment Approval

1. Verify the following requirements are present in the order:
 - a. **Order type** = Title only or Title & Escrow
 - b. Contacts entered for:
 - i. **Settlement Agent** Contact – must be pulled from the Lookup Table
 - ii. **Buyer/Borrower** Contact – **Name** must be populated
 - c. **Escrow Office** code is populated
 - d. **Escrow Officer** is selected
 - e. **Property address 1, City, State, Zip code** and **County** are populated
 - f. **Commitment Effective Date** is populated
2. **Save** the order

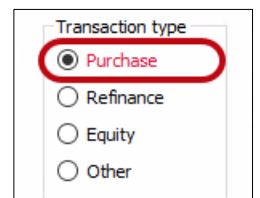
A **Pending Work** notification is displayed. The message states, *There is pending automation work for 'your order number'. It will continue once you close the order.*

3. **Exit** the order to complete the process

When all conditions are met, upon your **first** save **and** exiting the order, the document is created and uploaded to the orders Smartview folder.

Process: Letter PIE

1. Verify the following requirements are present in the order:
 - a. **Transaction type** = Purchase
 - b. Contacts entered for:
 - i. **Settlement Agent** Contact – must be pulled from the Lookup Table
 - ii. **Buyer/Borrower** Contact – **Name** **and** **Address** must be populated
 - c. **Escrow Office** code is populated
 - d. **Escrow Officer** is selected
 - e. **Property address 1, City, State, Zip code** and **County** are populated
2. **Save** the order



Transaction type

- ☒ Purchase
- ☐ Refinance
- ☐ Equity
- ☐ Other

A **Pending Work** notification is displayed. The message states, *There is pending automation work for 'your order number'. It will continue once you close the order.*

3. **Exit** the order to complete the process

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When all conditions are met, upon your **first** save **and** exiting the order, the document is created and uploaded to the orders Smartview folder.

Process: Open Order Sheet with Notes

1. Verify the following requirements are present in the order:
 - a. Contacts entered for:
 - i. **Settlement Agent** Contact – must be pulled from the Lookup Table
 - ii. **Buyer/Borrower** Contact – **Name** must be populated
 - b. **Escrow Office** code is populated
 - c. **Escrow Officer** is selected
 - d. **Property address 1, City, State, Zip code** and **County** are populated
2. **Save** the order

A **Pending Work** notification is displayed. The message states, ***There is pending automation work for 'your order number'. It will continue once you close the order.***

1. **Exit** the order to complete the process

When all conditions are met, upon your **first** save **and** exiting the order, the document is created and uploaded to the orders Smartview folder.

Process: Privacy Statement

2. Verify the following requirements are present in the order:
 - a. **Settlement Agent** Contact – must be pulled from the Lookup Table
 - b. **Escrow Office** code is populated
 - c. **Escrow Officer** is selected
 - d. **Commitment Effective Date** is populated
3. **Save** the order

A **Pending Work** notification is displayed. The message states, ***There is pending automation work for 'your order number'. It will continue once you close the order.***

4. **Exit** the order to complete the process

When all conditions are met, upon your **first** save **and** exiting the order, the document is created and uploaded to the orders Smartview folder.

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Process: Wire Fraud Alert Notice

3. Verify the following requirements are present in the order:
 - a. Contacts entered for:
 - i. **Settlement Agent** Contact – must be pulled from the Lookup Table
 - ii. **Buyer/Borrower** Contact – **Name** must be populated
 - b. **Escrow Office** code is populated
 - c. **Escrow Officer** is selected
4. **Save** the order

A **Pending Work** notification is displayed. The message states, ***There is pending automation work for 'your order number'. It will continue once you close the order.***

5. **Exit** the order to complete the process

When all conditions are met, upon your **first** save **and** exiting the order, the document is created and uploaded to the orders Smartview folder.