FNTG-Approved Notaries Database

July 2024

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

Contents

History

Date	Version	Details
07/29/2024	V1.0	User Guide

Introduction

This integration will enable users to access the FNF Notary Search database within SoftPro 360, search for suitable notaries for in-person notarial acts exclusively, retrieve their contact information, and seamlessly import it into the ProForm Order.

Accessing the Vendor Services

1. Select the **Services** tab
2. Click the **Settlement Services** folder to expand
3. Double-click **FNTG-Approved Notaries Database**
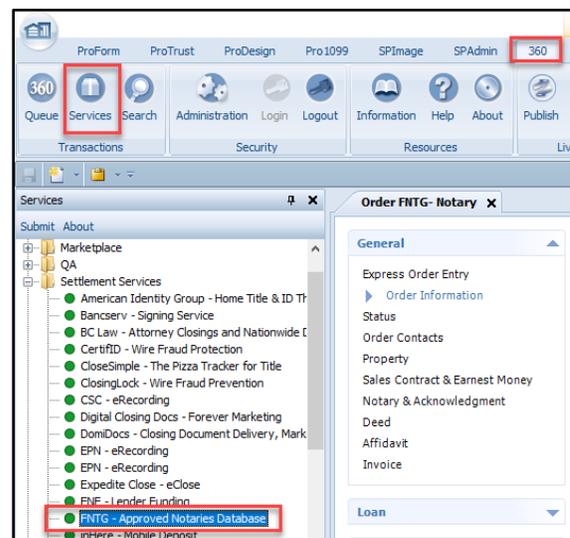
4. From the **Order Linking** window
   a. If no order is open, enter the corresponding order in the **Selected Order Number** field

   b. If a single order is open, the order number is shown in the **Open Order Numbers** field and the **Selected Order Number**

   NOTE: The **Selected Order Number** field can be overwritten with an order that is not open.

   c. If multiple orders are open, all order numbers appear in the **Open Order Numbers** field and the first order is displayed in the **Selected Order Number** field. Highlight an order in the **Open Order Numbers** field to select the applicable order


5. Press the **OK** button to continue

Notary Search Screen

The Notary Search screen enables users to choose from three distinct types of notaries for their search. Each option represents a different category of notary: **Direct Notaries, Signing Services and Subcontractor Search.**

The selection for Direct Notaries is set by default on the Notary Search screen. However, users can choose other notaries for their search by selecting the appropriate radio button.
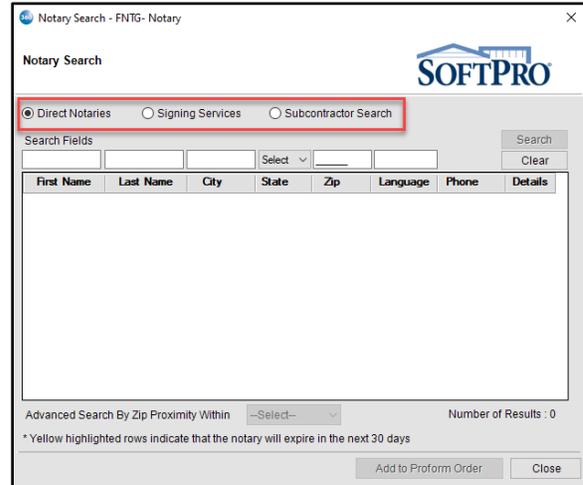
Direct Notaries: Users can search for Direct Notaries by utilizing the search fields which include **first name**, **last name**, **city**, **state**, **zip** or **language**.

The state can be selected from a drop-down menu. All search fields support partial searches except zip, allowing users to search by either the full name or part of it.

Search Button: The search button will become active once the user input information into any of the search fields.

Clear Button: The clear button will clear the data in the grid, allowing the user to proceed with the next search.
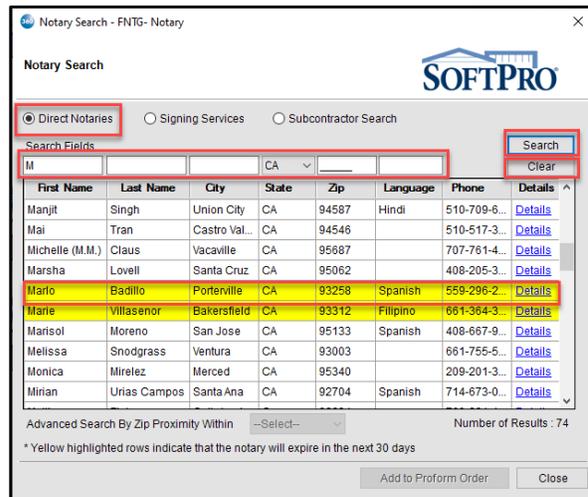
Rows highlighted in yellow within the gird indicate that the notary's expiration date within the next 30 days from the current system date. This is based on the expiration dates of **E& O Expiration, Commission Expiration, Background Check Expiration and TVISR Expiration.**

Advanced Search By Zip Proximity within: The advanced search by zip proximity option in the drop-down menu will be activated only when the user enters a zip code in the zip field. This drop-down menu allows the user to choose from distance options of 5, 10, 15, 25 and 75 miles, providing a range of proximity choices.

Close Button: The close button will close the integration.
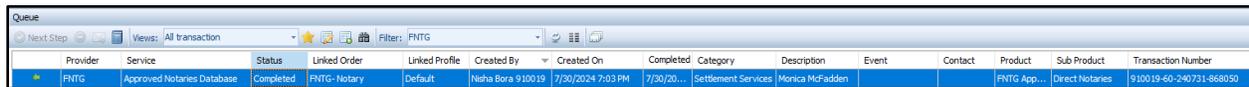
Add to ProForm Order: Upon clicking, the Add to ProForm button will add the selected direct notary as a Contact in the ProForm order and create the notes in the ProForm order as well.
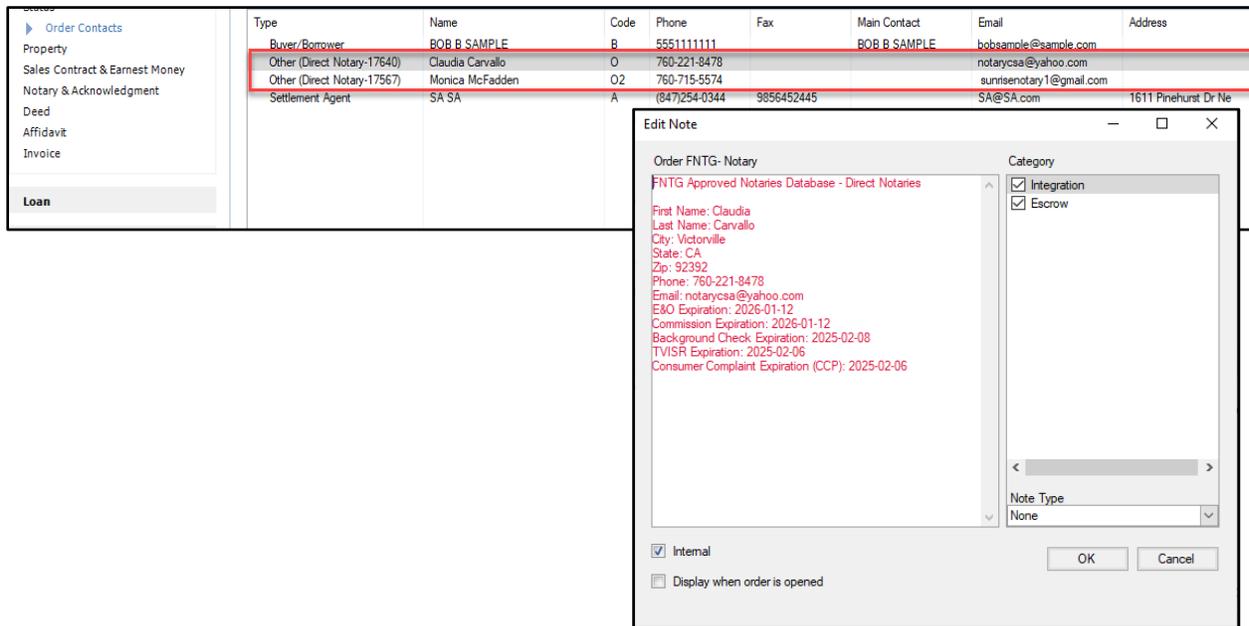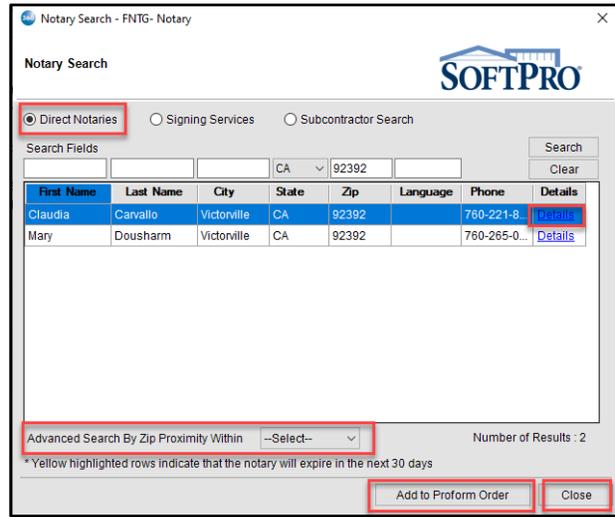
If the user attempts to add the selected notary again in the ProForm order, the system will notify the user that the notary contact already exist in the ProForm and will provide the choice to either add it or not.
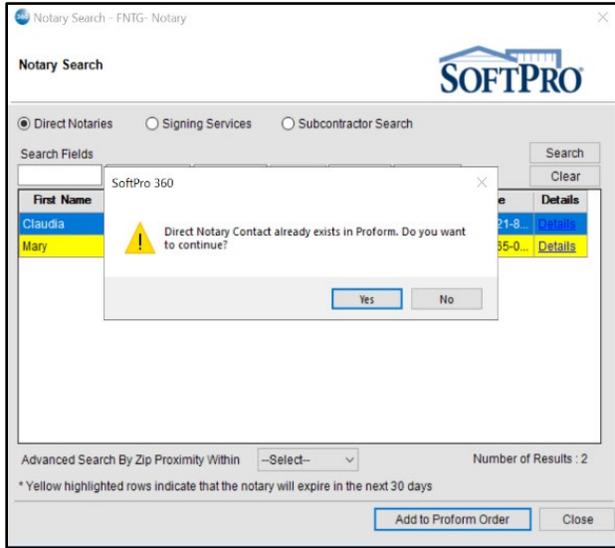
Clicking on "Add to ProForm order" will also create a transaction in the 360 Queue.

Details hyperlink: Clicking on the details hyperlink on the notary search screen will display a pop-up with additional information about the selected notary.

Add to ProForm Order: Users will also have the ability to add the selected notary to the ProForm order by clicking on the add to ProForm order button.

Back: The Back button will return the user to the notary search screen.
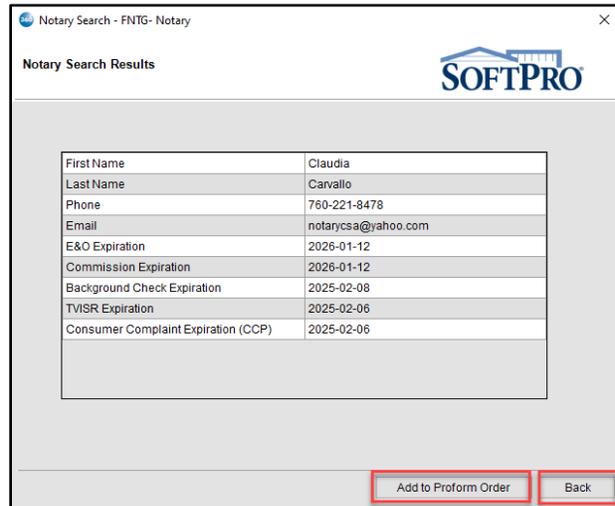
Signing Services: Users can search for Signing Services by utilizing the search fields which include **company name, city, state, and zip.**

The state can be selected from a drop-down menu. All search fields support partial searches except zip, allowing users to search by either the full name or part of it.

Rows highlighted in yellow within the gird indicate that the notary's expiration date within the next 30 days from the current system date. This is based on the expiration dates of **E& O Expiration and TVISR Expiration.**
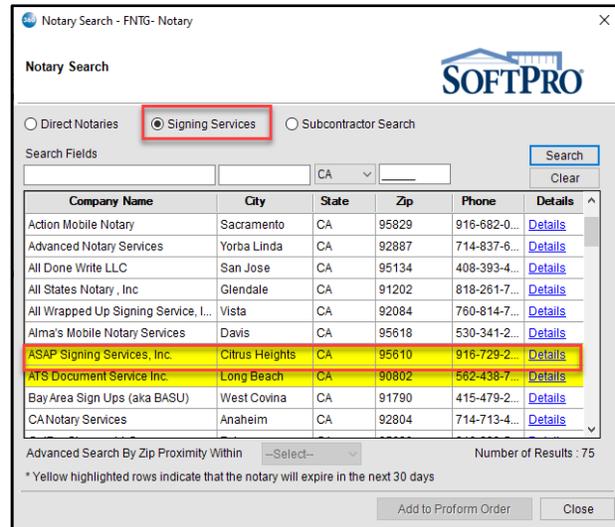
Note: The remaining functions operate in the same manner as those outlined for the direct notary above.

Subcontractor Search: Users can search for Subcontractor search by utilizing the search fields which include **first name**, **last name**, **city**, **state**, **zip** or **language**.

Rows highlighted in yellow within the gird indicate that the notary's expiration date within the next 30 days from the current system date. This is based on the expiration dates of **Background Check Expiration and TVISR Expiration.**
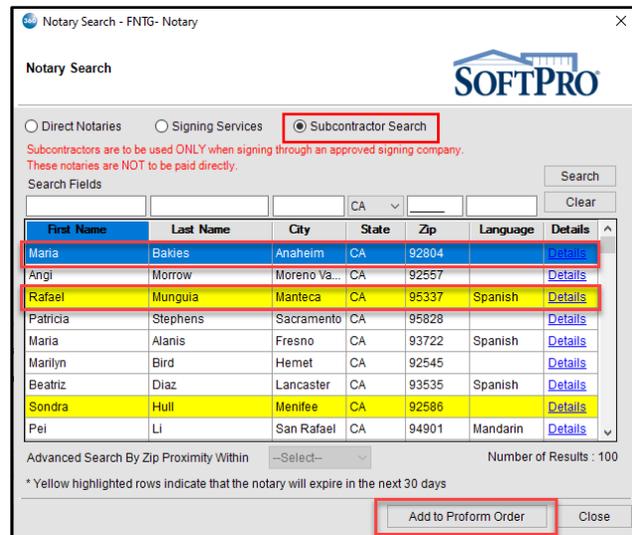
Add to ProForm Order: Clicking the "Add to ProForm Order" button will add the selected subcontractor contact to the people section of the ProForm order.

If the selected subcontractor contact doesn't have an associated signing service in ProForm order, the system will provide a list of associated signing services. From here, user can select the signing service and click "Add to ProForm order".

Cancel: The Cancel button will return the user to the previous screen.

Note: The remaining functions operate in the same manner as those outlined for the direct notary above.