

Pythonic Automated CD Processing User Guide

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History

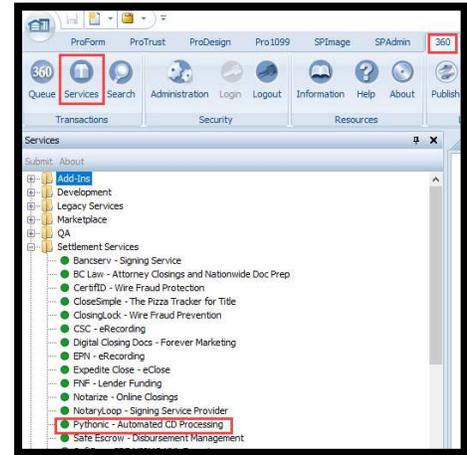
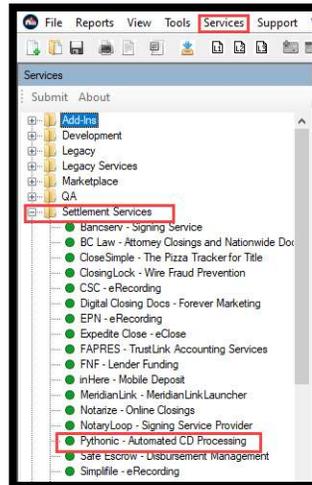
Date	Version	Details
5.12.2023	1.0	Initial Product

Introduction

This integration between SoftPro and Pythonic will allow SoftPro users to launch an interface to upload a closing disclosure document. The closing disclosure document (pdf) will be submitted to Pythonic in which they will utilize their Optical character recognition (OCR) technology to remit back parsed organized data from the closing disclosure.

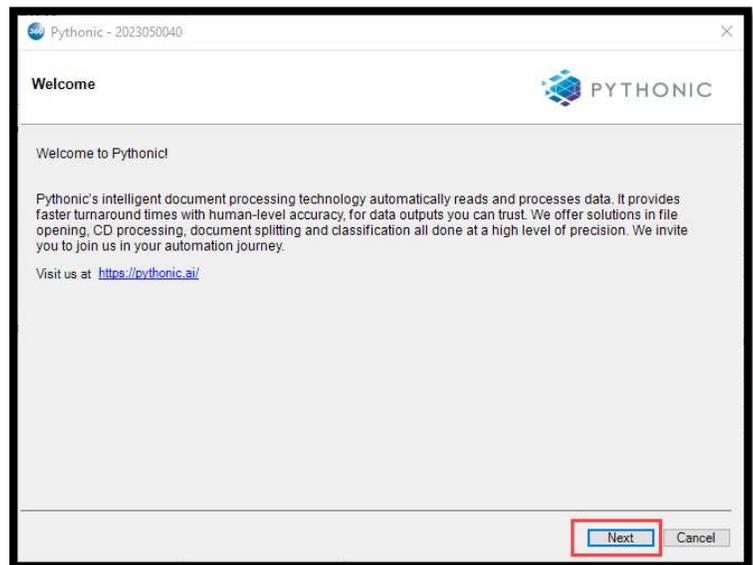
Accessing the Vendor Services

1. Select the **Services** tab
2. Click the **Settlement Services** folder to expand
3. Double-click **Pythonic – Automated CD Processing**



Logging into Pythonic

Pythonic offers a single sign-on process for SoftPro users. You will be presented with the Welcome screen and after clicking 'Next', the users Email Address, Serial Number, and Organization information is obtained to send to Pythonic with your request.



Click **Cancel** to exit the **Welcome** screen.

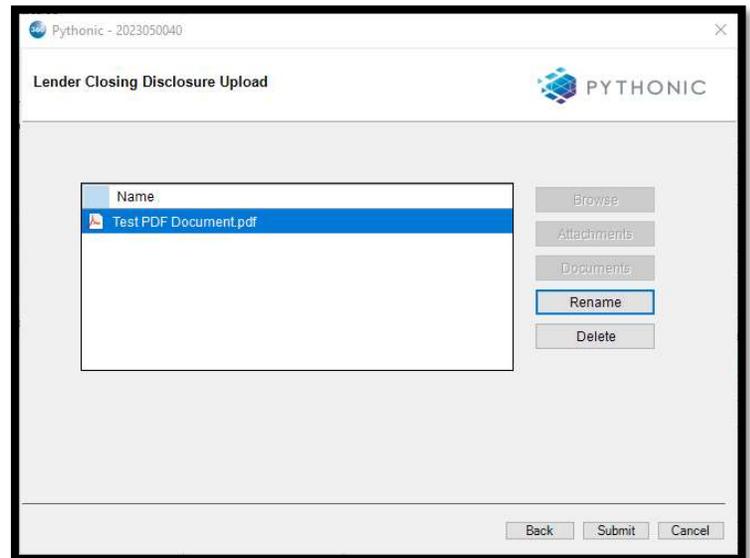
Click **Next** to continue to the **Lender Closing Disclosure Upload** screen.

Lender Closing Disclosure Upload

The **Lender Closing Disclosure Upload** screen allows the user to submit the Closing disclosure to Pythonic to parse the data and send back to import into the SoftPro Order.

When a document is selected, you will see the document in the table where you are able to rename or delete the document.

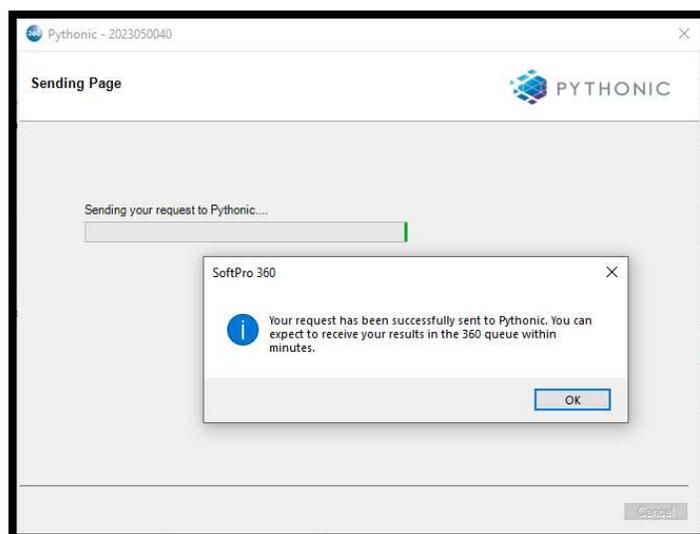
- Browse allows you to choose a document from your local storage.
- Attachments allows you to choose attachments in your order.
- Rename allows you to rename the selected document.
- Delete allows you to delete the selected document.



NOTE: Only 1 document may be uploaded and sent to Pythonic

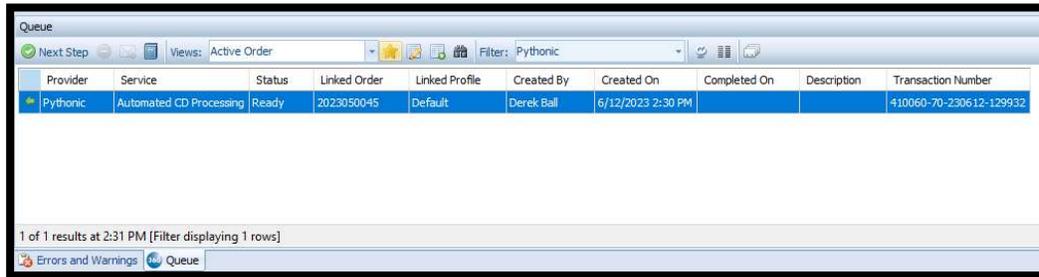
Click **Cancel** to exit the Documents Screen.
Click **Submit** to send your request to Pythonic.
Click **Back** to return to the Form Detail Screen.

Once your request has been submitted to Pythonic, you will receive a message 'Your request has been successfully sent to Pythonic. You can expect to receive your results in the 360 queue within minutes.' Click 'OK' to exit the integration.

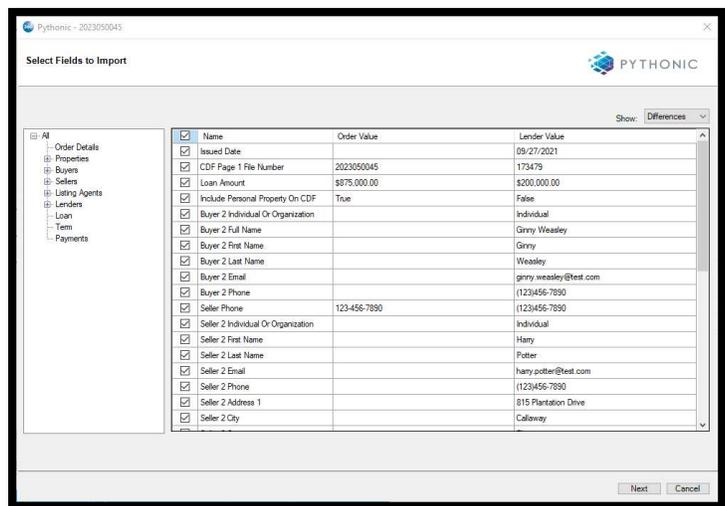


Reviewing Data sent by Pythonic (Select Fields to Import Screen)

Once Pythonic has sent the data from the closing disclosure to the order, the transaction status will change the 'Ready'. You can click on the transaction, and Next Step will activate.



By clicking on Next Step, the **Select Fields to Import** screen will load. This screen will display all of the fields sent by Pythonic to upload into your order. Under the Show drop down, you can select to show All or Differences. All option will allow display all of the data sent by Pythonic. Differences option will allow display only the fields that are different from your ProForm order and what Pythonic has sent.

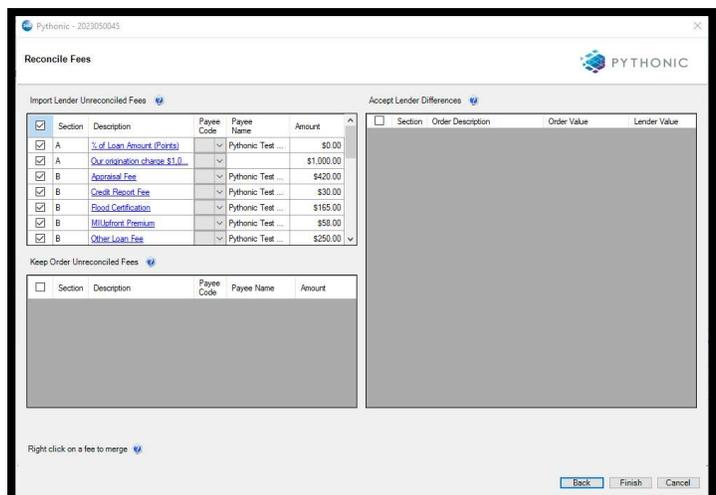


Click **Next** to continue to the **Reconcile Fees** screen.

Click **Cancel** to exit the Pythonic Integration.

Reconcile Fees Screen

The **Reconcile Fees** screen allows users to review fee data returned by Pythonic.



Import Lender Unreconciled Fees

This area displays fees in the lender's data that are not already in your order. Check the box to import these fees to your order. The grid displays the following fields:

- Section
 - Section of where the fees provided by Pythonic will display on the CDF
- Description
 - Description of the fee provided by Pythonic
- Payee Code
 - Contacts provided by Pythonic and Contacts listed in the ProForm order
- Payee Name
 - Payee Name provided by Pythonic
- Amount
 - Amount of the Fee provided by Pythonic
 -

Import Lender Unreconciled Fee Fields Screen

This screen will display information in regard to the selected fee. The grid displays the following fields:

- Name
 - Name from ProForm Order
- Order Value
 - Value of the Fee in the ProForm Order

Name	Lender Value
Buyer Paid At Closing	\$320.00
Buyer Paid Before Closing	\$0.00
Seller Paid At Closing	\$0.00
Seller Paid Before Closing	\$0.00
Paid By Others	\$100.00
Include In A.P.R.	False
Fee Type	AppraisalFee
Payee Name	Pythonic Test Lender
Payee Code	
Payor 3 IsPOC	False
Description	Appraisal Fee

Accept Lender Differences

This area displays fees that exist both in the lender's data and in your order. Fees are matched based on the fee type and CDF section. To accept all lender's changes into your order, check the box. To review details of the lender's changes, click the hyperlink. A detail screen will display to let you choose which of the lender's changes to apply. If you select some but not all of the lender's changes, the main grid will show a blue square instead of a check. If you have merged a fee, you can revert that action by right clicking the fee and selecting Under Merge. The grid displays the following fields:

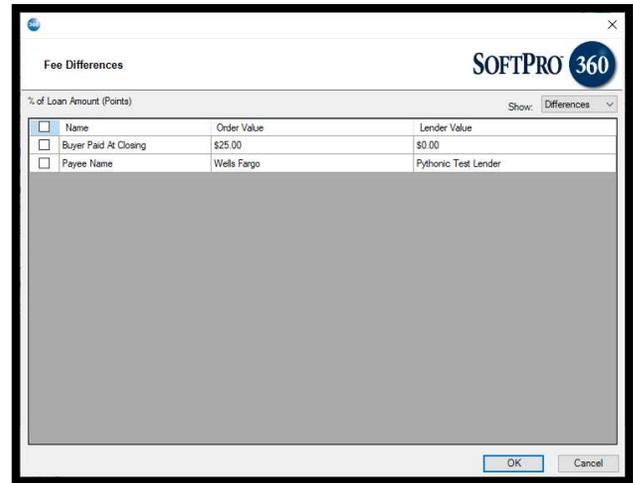
- Section
 - Section of where the fees provided by Pythonic will display on the CDF
- Order Description
 - Description of the fee provided by Pythonic
- Order value
 - Value listed in the ProForm Order

- Lender Value
 - Value provided by Pythonic
 -

Import Lender Unreconciled Fee Fields Screen

This screen will display information in regard to the selected fee. The grid displays the following fields:

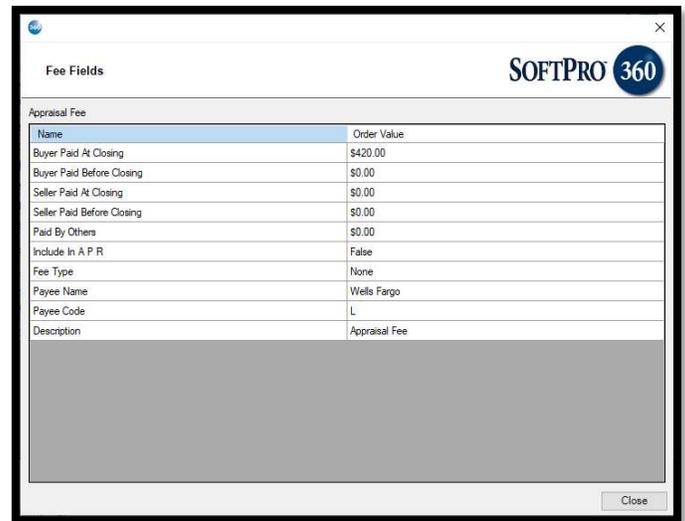
- Name
 - Name from ProForm Order
- Order Value
 - Value of the Fee in the ProForm Order
- Lender Value
 - Value provided by Pythonic



Keep order Unreconciled Fees

This area displays fees in your order that are not in the lender’s data. Check the box to keep these fees in your order. The grid displays the following fields:

- Section
 - Section of where the fees provided by Pythonic will display on the CDF
- Description
 - Description of the fee provided by Pythonic
- Payee Code
 - Contacts provided by Pythonic and Contacts listed in the ProForm order
- Payee Name
 - Payee Name provided by Pythonic
- Amount
 - Amount of the Fee provided by Pythonic



Fee Fields Screen

This screen will display information in regard to the selected fee. The grid displays the following fields:

- Name
 - Name from ProForm Order
- Order Value
 - Value of the Fee in the ProForm Order

Click **Back** to return to the **Select Fields to Import** screen.

Click **Finish** to import the data to the ProForm order.

Click **Cancel** to exit the Pythonic Integration.