CD Processing Integration for SoftPro 360

FAQ for FNF Office Leaders

1. Why is FNF rolling out this Pythonic integration?

FNF is investing in this integration to save your team a lot of time: in the form of keystrokes and clicks, in the form of 'stare and compare', and in the form of review and analysis of lender fee descriptions. This time savings will put you in a better position to manage changes in volume, both up and down.

2. What is the best change-management mindset for successful adoption of this integration by my team?

The first point is that AI is a next-generation tool to augment the capabilities of your team. You're making an investment in your team with this roll out. Title and escrow agents that learn how to use this new breed of AI tools will hold a big advantage over those who do not as the industry evolves.

The second point is that AI is like having a virtual "Army of Interns" to help with certain tasks. Just like human interns, AI will have some strengths and weaknesses, and there will be the opportunities for training along the way. The objective is to have a cooperative mindset that embraces working with the 'interns' versus finding reasons to avoid using the integration.

3. What is involved with the setup and configuration of this integration?

Since this is a SoftPro 360 integration, setup is easy. We've already worked with FNF to enable the integration for use by your office. The other information we need is a list of names and email addresses of possible users so that we can provide usage reports. We also request that you familiarize yourself with the default merge rules and review the list of company name aliases.

If you are automatically applying SoftPro templates to pre-populate Orders with common lender fee descriptions, you may wish to stop doing this. While the integration can match empty, pre-populated lines in an Order with any corresponding lender fees, it requires that

MISMO fee types be configured in your templates. If MISMO types are not configured, you could end up with duplicate lines after running the integration.

4. How can I train my team to use this integration?

There are multiple opportunities for training your team.

- **Training webinars**: Pythonic hosts 30-minute training webinars several times each week. Each webinar will include a live demo of the integration with plenty of time for live Q&A. You'll receive a registration link to circulate to your team.
- **How-to video**: Pythonic has produced a video that covers the basics of the integration and how to use it.
- **Pythonic documentation**: Pythonic has assembled short, topic-specific documents in an Information Materials packet to share with your team.
- **SoftPro documentation**: SoftPro provides official documentation about this integration.

5. What do I tell my team about CDs that get "rejected"?

CDs that cannot be processed by the integration are called "rejections". Rejections are perfectly normal, particularly during the onboarding and training period (the first ~30 days) when the integration is more likely to initially encounter CD variations unique to your location or the lenders you work with.

If a member of your team experiences a rejection with a CD on a particular transaction, they will need to process that CD manually. Please tell them to continue using integration on other transactions. The more CDs sent to the integration, the faster the integration will be able to learn the variations found in your office and minimize the rejection rate over the long term.

After the onboarding and training period, rejections mostly occur due to incomplete CDs (e.g. pages missing) or due to poor scanning (e.g. when portions of a CD are difficult to read).

6. What are the configuration options for my office?

The primary configuration option for your office relates to the rules engine that filters the lender data that's sent back to the Order. The default rules configuration was developed and fine-tuned by leaders at FNF offices in three different regions. It is recommended that you work with the default configuration while your team is learning the integration. Once your team is proficient with using the default configuration, you can meet with Pythonic regarding possible changes.

7.   What reporting is available?

During the onboarding and training period (the first ~30 days), Pythonic will provide weekly reports showing usage by office and by employee. After onboarding and training, Pythonic will provide monthly usage reports.

8.   What does it cost to use this integration?

Pricing for this integration is usage-based. Further, pricing is tiered, based on the collective volume of usage *across all FNF offices* in a calendar month. FNF has negotiated a discounted usage rate according to the following schedule:

- First 500 CDs processed (1 - 500) per month: $2.02 per CD
- Next 2,000 CDs processed (501 - 2,500) per month: $1.77 per CD
- Over 2,500 CDs processed (2,501 and up) per month: $1.47 per CD

There is also a monthly minimum fee of $1,200, split equally among all FNF offices using the integration. Each month, you will pay the greater of your actual usage or your share of the monthly minimum.

9.   If I process multiple CDs related to the same loan, am I charged for each CD?

It is common that multiple Lender CDs are received while completing a real estate transaction. Because we want to encourage consistent use on every CD, usage fees are capped at $5.00 per loan.

10. Who do I contact with questions?

Questions about this integration can be emailed to: **fnfsupport@pythonic.ai**