Exporting to Branded-site Users

The Data Export SoftPro 360 integration provides another option to export closing disclosure form (CDF) and "title" data to the lender, or simply save it to their local disk. This user guide focuses on exporting to branded-site users using the "Other" option. The format for delivering these datasets will be an XML document that uses MISMO 3.3. The user has the option to select one or both of these datasets for export. "Title" data is defined in the ProForm order using the following fields:

- Long legal description
- Grantee Vesting Info,
- Lien Date,
- Lien Recording Date,
- Lien Book,
- Lien Page and
- Lien Grantee Title

For the CDF, the data on all 5 pages of the form will be included in the export. XML is the only format that this product will support. The intention is to allow the lender to ingest / upload the XML document into their respective loan origination system (LOS).

Launching the Data Export tool

Data Export can be found in the Services panel under the 360 tab, as shown in Figure 1.
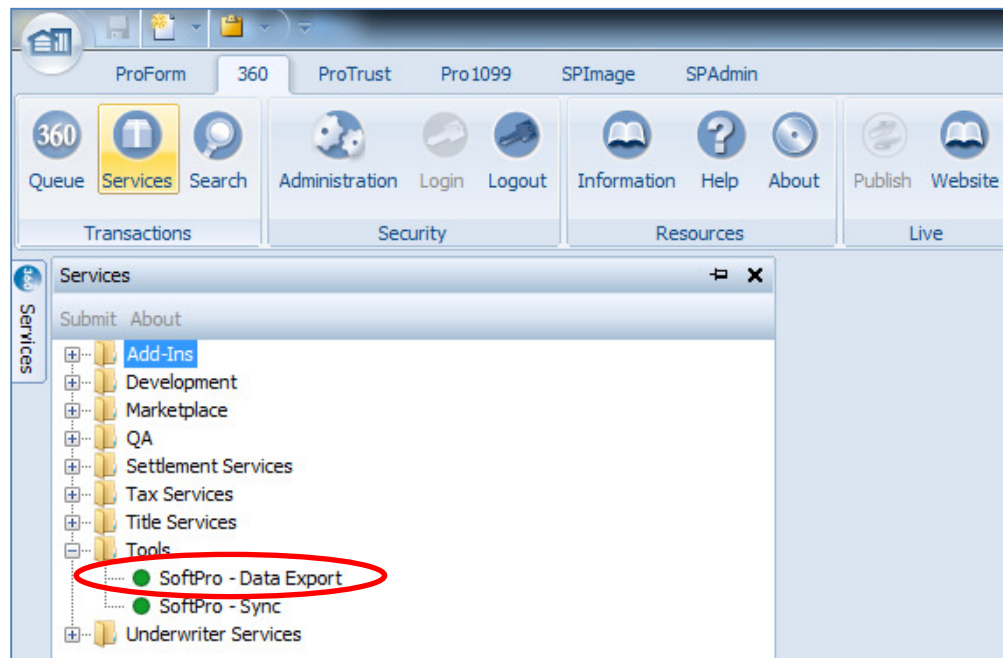

Figure 1: launching the Data Export tool

Selecting Orders to export

Double clicking **SoftPro - Data Export** will open the integration and the order linking dialogue will be displayed, seen in Figure 2.
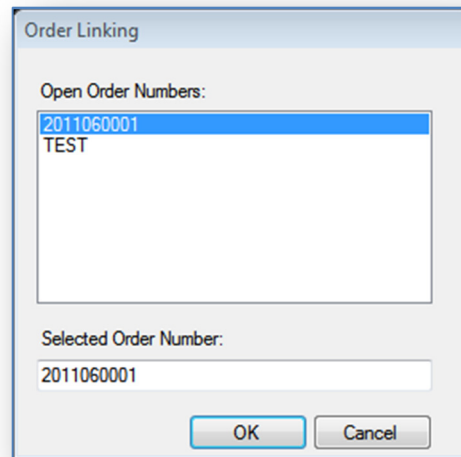
If a ProForm order(s) is already open, it will be listed in the Open Order Numbers box. The active order will be highlighted and displayed in the Selected Order Number field. Any of the open orders can be selected or the number can be overwritten with any existing ProForm order number. Once the order to be linked is entered click OK to continue.

Selecting the Dataset and Export to options

The Data Export screen will be displayed allowing Dataset selection and an Export To option. If multiple loans exist in the ProForm order, *only the main (or first) loan will be displayed*.

Note: the Data Export product does not support the concept of multiple loans per order in this release.

Both the **Title Data** and **Closing Disclosure Form Data** datasets will be checked by default if the ProForm order Settlement Type is CDF.

The **Customer Web Portal** (CWP) option will be selected by default, but if the loan did not originate from the Customer Web Portal then **Other** (i.e., for FNF branded-site users) should be selected. Figure 3 shows the **Other** option selected.

Figure 3: Other option is selected

Email Notification screen for the Other options

Clicking **Next** will open the Email Notification screen, seen below in Figure 4. This screen will display the loan contacts (e.g., Lender) entered into the ProForm order that have a name and email address. Additional contacts can be added by clicking the Add icon. Select the contacts to receive the email which will inform them that the dataset(s) are available to be retrieved. After an email contact has been selected the **Export** button will become enabled.


Figure 4: Email Notification screen

Note: When the **Other** option is chosen, the selected recipients of the email notification *must* be registered in Vendor Management.

Note; All users who have been setup and provided access to the "updated" FNTG Rate Calculator URL's will have access to this function as they are "registered" in Vendor Admin.

The dataset will not be exported to any email recipients who fail this validation.

If validation fails the following message will appear:
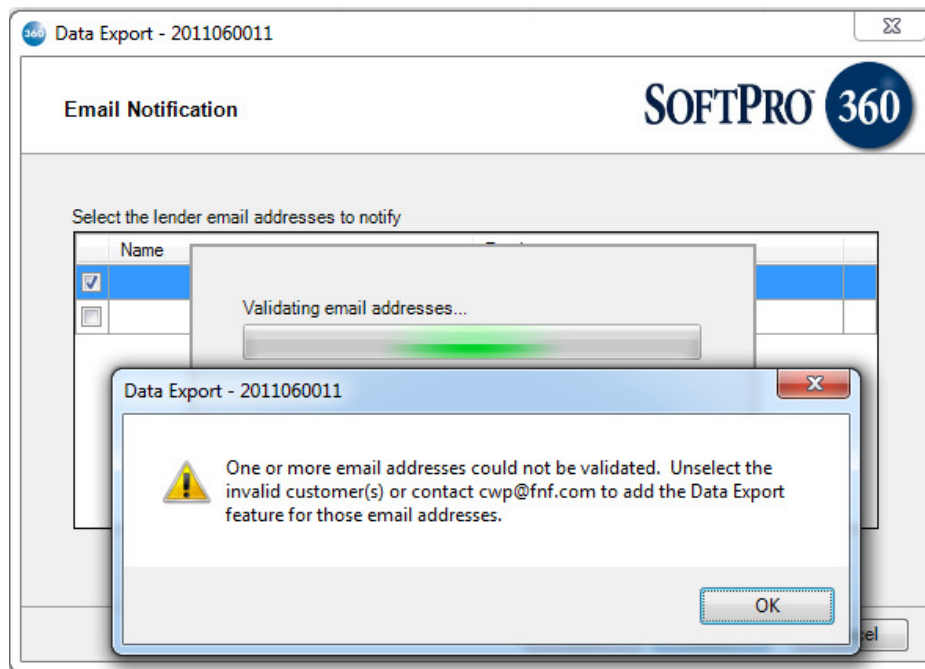
After clicking **OK**, the user will be shown which email failed validation (the address will have a red 'X" next to the entry, as seen below):
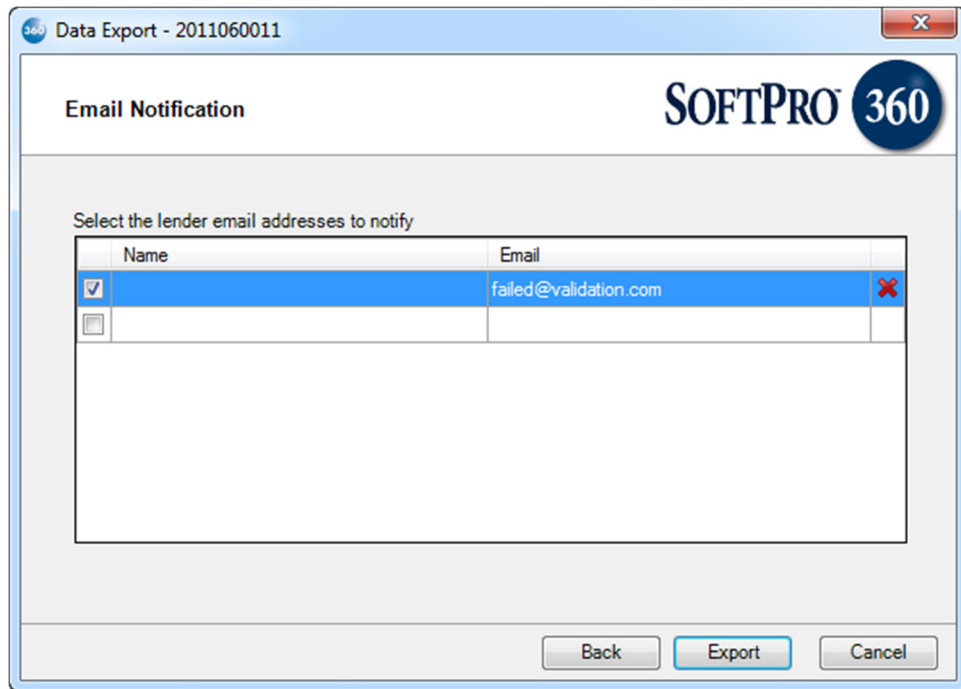
Once validation is successful an email is sent to the email recipients informing them that the dataset(s) is available. The dataset will be in the form of an XML document. Emails sent to **Other** will contain a direct URL link to the order's dataset(s), found in the respective branded site.

Transaction status

Once the transaction has been exported a message will be displayed if the export was successful (Figure 5). The transaction status in the SoftPro 360 queue will update to Completed. At this point, no further action is required unless the ProForm order data is updated: if so, a new Data Export transaction needs to be completed.
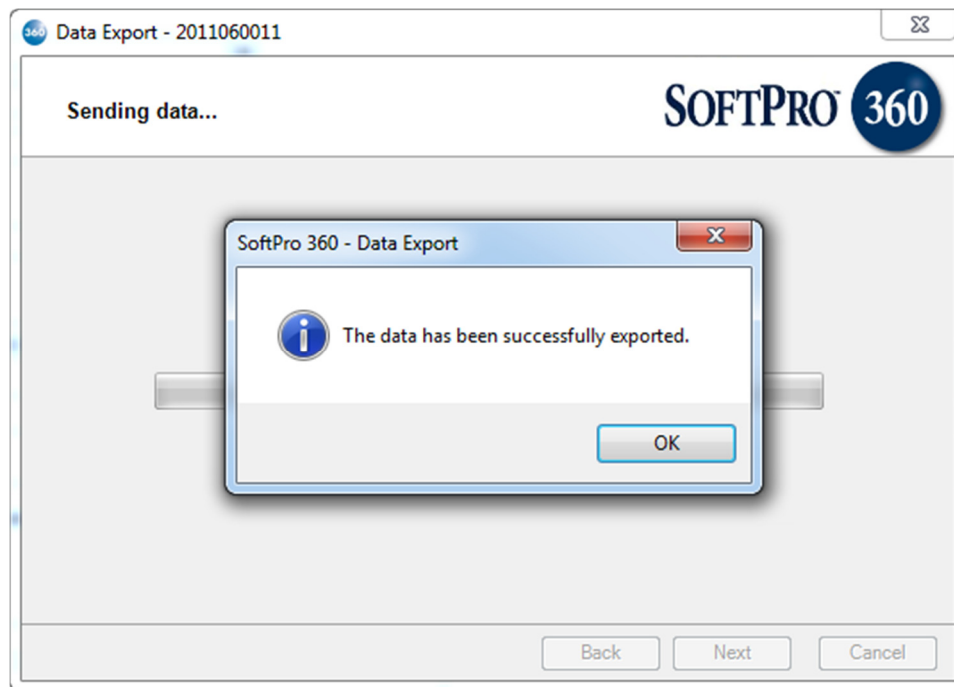
Figure 5: Successful export messaging

Other email recipients

Other email recipients will receive an email with a hyperlink that will take them directly to the Data Export page containing the dataset(s) after authentication (Figure 6). This is a new page built in Live, specifically for the Data Export product.
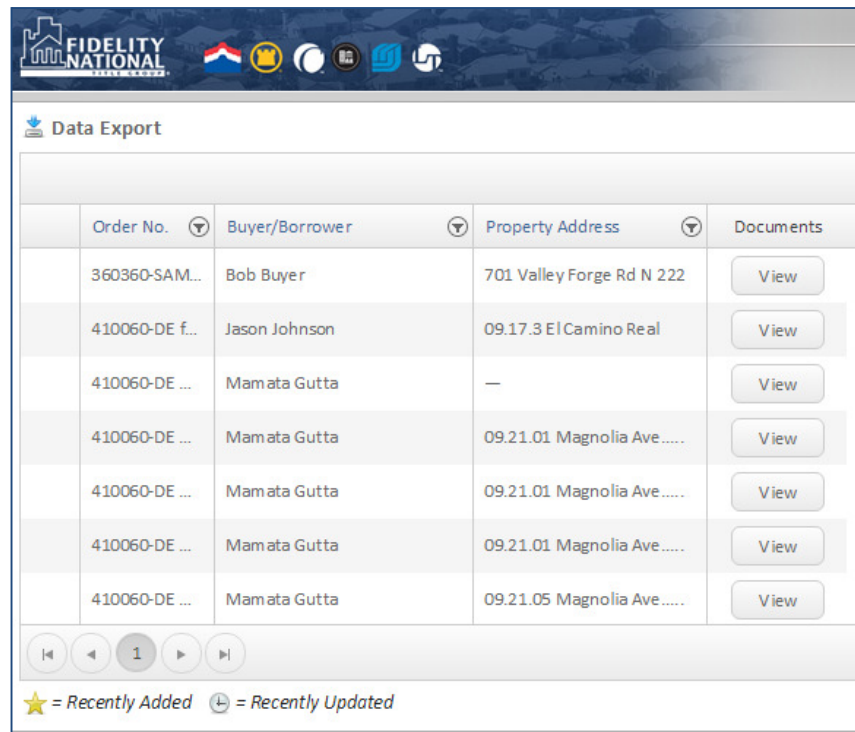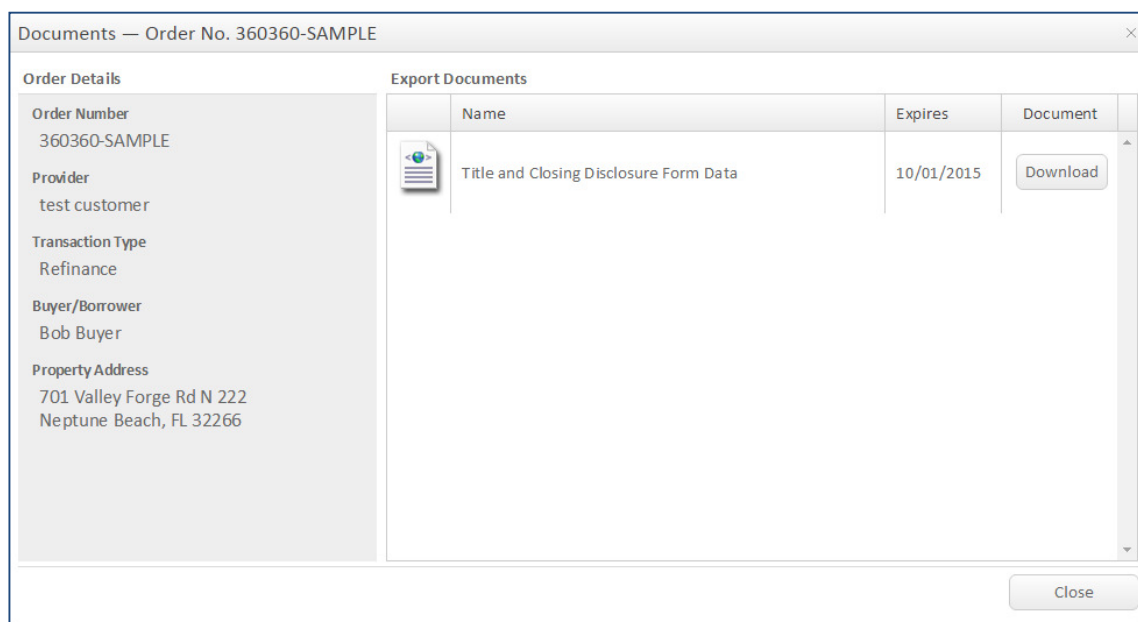

Figure 6: Data Export in Live

The FNF branded site user will be able to download the XML document(s) from here. The user may also navigate back out to the Data Export orders listing page, should the user have multiple datasets available to them from different orders (Figure 7).

Figure 7: Data Export page (all brands shown here)