SoftPro Orders Express
User Guide

October 2024

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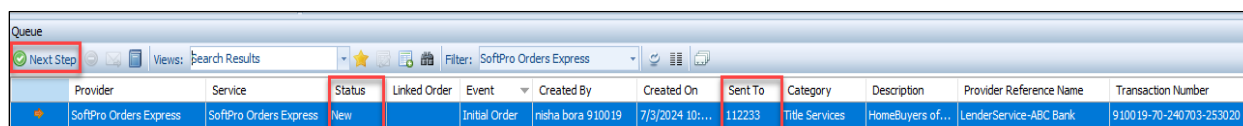# Table of Contents

History

Date	Details
08/2024	Updated Draft

Introduction

SoftPro Orders Express (SOE) accepts a standard, SoftPro defined inbound payload from any lender and then delivers a standard outbound payload that includes status updates via events. These events can be customized by the lender and include relevant order data and documents. Additionally, standard events can be automated, helping speed up the Title process.
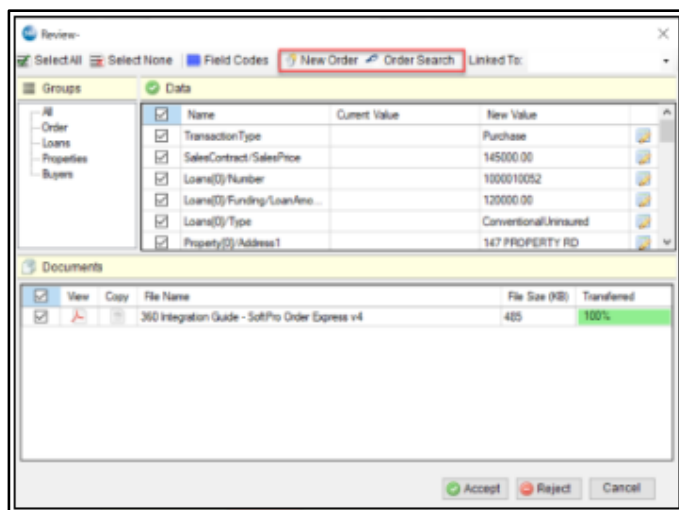
Accessing the Vendor Services

SOE is an inbound integration, which is accessed via the SoftPro 360 Queue. New orders populate in the **Queue** with a status of **New**. Filters can be set up based on Branch PID, which will show in the **Sent To** field.

Clicking the **Next Step** button opens the **Review** screen. From here users can click the **New Order** button to create a new order or the **Order Search** button to search for an existing order to link to the SOE transaction.

Once an order is created or an existing order selected, the **Linked To** box shows the linked order for the transaction and the **smartView** link is updated (if applicable) to show the corresponding order.

Click the **Reject** button to reject the new order. A rejection comment will be collected and sent to the vendor, and the transaction will move to a Rejected status.

Click the **Accept** button to continue.

The transaction status in the **360 Queue** updates to show **Accepted.**

Users can Cancel an order from the 360 Queue by clicking the Cancel option. A cancel comment will be collected and sent to the vendor and the transaction will move to a Canceled status.

Note: *If a vendor sends an update to an order, users will click the next step to review the new data and/or documents sent, and then either reject or accept the update.*

Clicking **Next Step** on an Accepted order opens the **Summary Screen.**

Click the **Add Event** button to open the **Select Event** window.

Adding an Event

There are two types of events: Predefined Events and Vendor Defined Events.

Predefined Events - There are six predefined events as follows:

1. **Provide Clear to Close**- The file is clear to close. Sends a comment with the event name Provide Clear to Close to the vendor.

2. **Provide Not Clear to Close** - There are items that need attention before granting approval. Sends a comment with the event name Provide Clear to Close to the vendor.

3. **Provide Preliminary Report/Commitment** – Send the preliminary report document and data.

4. **Provide Final Policy** – Sends the final policy document and optional notes to the vendor.

5. **Provide Additional Documents-** Provides the ability to send additional documents and optional notes to the vendor not defined by any other event by the vendor.

6. **Provide Additional Comment -** Provides the ability to send additional comments not previously defined, to the vendor.

Vendor Defined Events - These events can be simple events or events that request a document.

This is a required selection indicated by the red ⬚ asterisk, and the **Next** button is disabled until an Event is selected.

Note: *Users will only see the standard (Predefined events) or custom events (Vendor defined events) if the vendor sends them in the payload for the transaction.*

Provide Clear to Close/Not Clear to Close

Selecting **Provide Clear to Close** or **Not Clear to Close** event opens a dialog box where comments can be added to clarify the status.

Clicking **Submit** sends the status to the Lender and adds the **Provide Clear to Close** or **Not Clear to Close** event to the **Summary Screen**.

Provide Preliminary Report/Commitment

Selecting **Provide Preliminary Report/Commitment** event opens the **Preliminary Title Information** screen. This information will be sent with the Preliminary Report/Commitment. The data on the screen is pre-populated from the ProForm order as follows:

- **Vesting**
  Title tab/Preliminary Title Search & Opinion/Propery Derivation/ 'Grantee'
- **Legal Description**
  General tab/ 'Escrow Legal'

- **Comments**

  Not mapped, used to communicate to the vendor from this screen

- **Lien Information**

  o **Priority**

  Title tab/Existing Liens page/ 'Priority'

  o **Grantee**

  Title tab/Existing Liens page/Lender/ 'Mortgagee'

  o **Dated**

  Title tab/Existing Liens page/ Recording Information/ 'Dated'

  o **Recording Date**

  Title tab/Existing Liens page/ Recording Information/ 'Date/Time Recorded'

  o **Book**

  Title tab/Existing Liens page/ Recording Information/ Recorded at/in / **field 2** or parsed from 'Place Recorded'

  o **Page**

  Title tab/Existing Liens page/ Recording Information/ Recorded at/in / **field 4** or parsed from 'Place Recorded'

  o **Instrument**

  Title tab/Existing Liens page/ Recording Information/ Recorded at/in / **field 6** or parsed from 'Place Recorded'

If the information is not available in the ProForm order, the fields will be blank. However, the user will have the option to click the **View/Edit** icon to add or modify the information as needed.

Click the **Next** button to open the **Documents** screen.

Click the appropriate buttons to find and add the Preliminary Report/Commitment.

After adding the document, choose the document **Type** from the drop-down menu and click **"Submit"** to send it.

Once sent, the **Provide Preliminary Report/Commitment** event is added to the **Summary Screen**.

Provide Final Policy

Select **Provide Final Policy** to open the **Documents** screen.

Click the appropriate buttons to find and add the Final Policy.

After adding the document, choose the document **Type** from the drop-down menu and click **"Submit"** to send it.

Once sent, the **Provide Final Policy** event is added to the **Summary Screen**.

Note: Provide Additional Documents / Provide Additional Comment events and vendor defined events follow the existing document workflow and comment workflow. Users can attach up to 10 documents when selecting "Provide Additional Documents" or a vendor defined event for documents.