



# SoftPro Orders Express User Guide

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## History

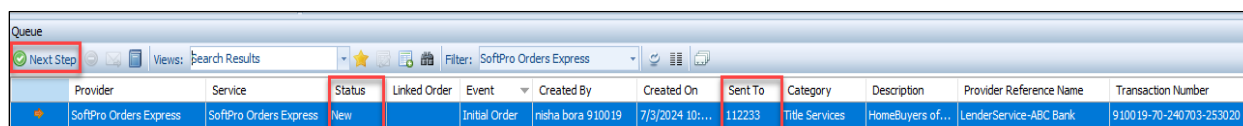
Date	Details
08/2024	Updated Draft

## 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.

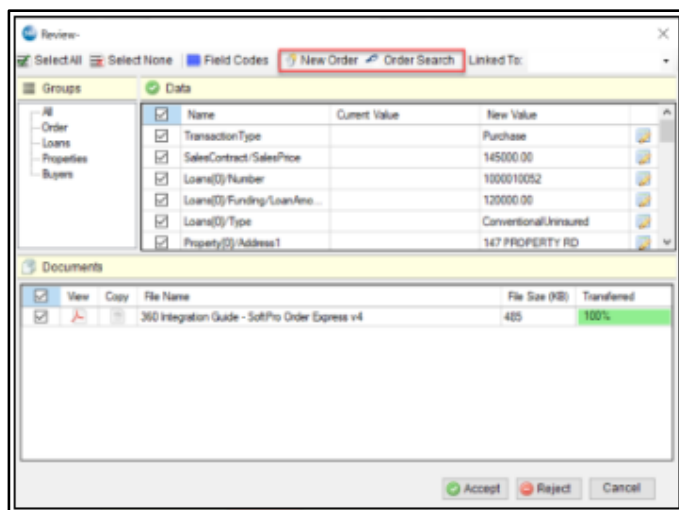
## Accessing the Vendor Services

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.



Provider	Service	Status	Linked Order	Event	Created By	Created On	Sent To	Category	Description	Provider Reference Name	Transaction Number
SoftPro Orders Express	SoftPro Orders Express	New		Initial Order	nisha bora 910019	7/3/2024 10:...	112233	Title Services	HomeBuyers of ...	LenderService-ABC Bank	910019-70-240703-253020

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.



Review

Select All | Select None | Field Codes | **New Order** | Order Search | Linked To:

Groups	Name	Current Value	New Value
All	TransactionType		Purchase
Order	SalesContract/SalesPrice		145000.00
Loans	Loans(0) Number		1000010052
Properties	Loans(0) Funding/LoanAme...		120000.00
Buyers	Loans(0) Type		Conventional/Uninsured
	Property(0) Address1		147 PROPERTY RD

Documents

View	Copy	File Name	File Size (KB)	Transferred
<input checked="" type="checkbox"/>		360 Integration Guide - SoftPro Order Express v4	405	100%

Accept | Reject | Cancel

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**.

Queue										
Views: Search Results Filter: SoftPro Orders Express										
Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On	Category	Description	Event	Transaction Number
SoftPro Orders Express	SoftPro Orders Express	Accepted	SOE	Default	nisha bora 910...	7/3/2024 11:51 AM	Title Services	HomeBuyers ...	Initial O...	910019-70-240703-25...

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.

Queue										
Views: All Transactions Filter: SoftPro Orders Express										
Provider	Event	Service	Status	Linked Order	Linked	Created On	Category	Description	Provider Reference Name	Transaction Number
SoftPro Orde...	Initial Order	SoftPro Orders E...	Canceled	SOE TEST3	Default	7/9/2024 9:49 AM	Title Servi...	HomeBuyers o...	LenderService-ABC Bank	910019-70-240709-253630

**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.

SoftPro Orders Express - 2024100019


Select Event

Select the Title Event to Submit

Provide Clear to Close
Provide Not Clear to Close
Provide Preliminary Report/Commitment
Provide Final Policy
Provide Additional Documents
Provide Additional Comment
Donec commodo diam lectus, vel pellentesque felis condimentum ac.
Nunc eleifend, lectus vitae consequat condimentum, tellus turpis sagittis libero
Morbi massa justo, blandit sit amet elementum ut, ornare vel augue.
Aliquam pellentesque tincidunt lorem, et commodo lectus tempor vel.
Cras vel magna interdum, fermentum magna non, condimentum nunc.

Next Close

**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**.

The image shows two overlapping windows from the 'SoftPro Orders Express - SOE TEST' application. The top window, titled 'Provide Clear to Close', has a 'Comments' text area and a checked 'Add to ProForm Notes' checkbox. At the bottom are 'Back', 'Submit' (highlighted with a red box), and 'Cancel' buttons. The bottom window, titled 'Summary Screen', displays a table of actions:

Action	Event Title	Document Name	Send/Received On	Created By
✓	Provide Clear to Close		8/27/2024 1:28:11 PM	Nisha Bora 910019
✓	New Title Order		8/27/2024 1:27:30 PM	Lodasoft-prov ref name

### 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/Property Derivation/ 'Grantee'
- **Legal Description**  
General tab/ 'Escrow Legal'

The image shows the 'Preliminary Title Information' screen from the 'SoftPro Orders Express - 2024100019' application. It includes fields for 'Vesting' (pre-filled with 'Vesting Information'), 'Legal Description' (pre-filled with 'The full legal description will go here'), and 'Comments'. There is a checked 'Add to ProForm Notes' checkbox. Below these is a 'Lien Information' table:

Priority	Grantee	Dated	Recording Date	Book	Page	Instrument	View / Edit
1	Bank of America	2024-10-...	2024-10-14 12:00:00 AM	Book ...	Page...	Instrume...	

At the bottom are 'Back', 'Next', and 'Cancel' buttons.

- **Comments**

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

- **Lien Information**

- **Priority**

Title tab/Existing Liens page/ 'Priority'

- **Grantee**

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

- **Dated**

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

- **Recording Date**

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

- **Book**

Title tab/Existing Liens page/  
Recording Information/ Recorded  
at/in / **field 2**

or parsed from 'Place Recorded'

- **Page**

Title tab/Existing Liens page/  
Recording Information/ Recorded  
at/in / **field 4**

or parsed from 'Place Recorded'

- **Instrument**

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

The screenshot shows the 'Recording Information' form. Red arrows point to specific fields with labels: 'Field 2' points to the 'Book' field (containing '22'), 'Field 4' points to the 'Page' field (containing '125'), and 'Field 6' points to the 'Instrument' field (containing '36C'). The form includes fields for 'Dated' (10/08/2024), 'Date/Time recorded' (10/14/2024 12:00 AM), 'Maturity date' (10/28/2024), 'Recorded at/in' (Book, Page, Instrument), 'Place recorded' (Book 22, Page 125, Instrument 36C), 'Place re-recorded', 'Trustee' (James Smithson), and 'Additional information'.

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.

The screenshot shows the 'Documents' screen in the 'SoftPro Orders Express - SOE 8262024' window. It features a table with columns 'Name' and 'Type'. To the right of the table are buttons for 'Browse', 'Attachments' (highlighted with a red box), 'Documents', 'Rename', and 'Delete'. Below the table is a 'Comments' section with a checkbox for 'Add to ProForm Notes' and a text area. At the bottom are 'Back', 'Submit', and 'Cancel' buttons.



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

SoftPro Orders Express - SOE 8262024

Documents

Name	Type
Preliminary Report.pdf	Security Instrum

Comments

Buttons: Back, **Submit**, Cancel

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

SoftPro Orders Express - SOE 8272024

Summary Screen

Action	Event Title	Document Name	Send/Received On	Created By
✓	Provide Preliminary Rep...	Preliminary Report	8/27/2024 1:11:37 PM	Nisha Bora 910019
✓	Provide Clear to Close		8/27/2024 1:10:37 PM	Nisha Bora 910019
✓	New Title Order		8/27/2024 1:10:11 PM	Lodasoff-prov ref name

Buttons: **Add Event**, Close

### *Provide Final Policy*

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

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

SoftPro Orders Express - SOE 8262024

Documents

Name	Type

Comments

Buttons: Back, Submit, Cancel

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**.

Action	Event Title	Document Name	Send/Received On	Created By
✓	Provide Final Policy	Final Policy	8/27/2024 1:18:55 PM	Nisha Bora 910019
✓	Provide Preliminary Rep...	Preliminary Report	8/27/2024 1:11:37 PM	Nisha Bora 910019
✓	Provide Clear to Close		8/27/2024 1:10:37 PM	Nisha Bora 910019
✓	New Title Order		8/27/2024 1:10:11 PM	Lodasoft-prov ref name

**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.