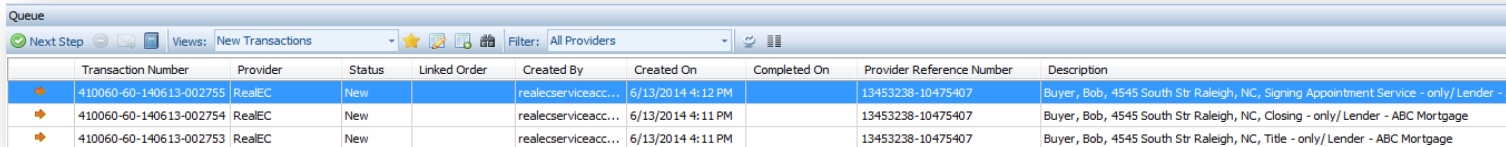# Managing the Common workflow for RealEC within SoftPro 360

The SoftPro 360 Common workflow for RealEC provides SoftPro 360 users the ability to receive Title, Escrow/Closing & Doc Signing order requests seamlessly from lenders directly into ProForm. In addition to accepting (or rejecting) order requests, a new order can be created with an extended amount of data automatically flowing into ProForm, increasing productivity and efficiency. Data, Documents and Comments can be sent and received throughout the life of the transaction.

## Accessing New RealEC orders within the SoftPro 360 queue

New orders sent will appear in the SoftPro 360 queue with a status of "New" and can be easily seen under the view 'New Transactions'. The Description column will display the Buyer's last name, Buyer's first name, the property address, type of Product (Title, Escrow/Closing, Doc Signing) being requested and the Lender's name.



To Accept or Reject a new transaction, highlight and double click the transaction or highlight and click Next Step. The Review screen will open and display all of the data sent from the Lender. Clicking 'Accept' will send the 130 – Service Confirmed event to RealEC. Included with the 130 event will be the order assignment information, which includes the accepting Company's name, accepting user's name and a phone number. This information can be accessed by clicking the order assignment/contact information link. Clicking 'Reject' will send the 140 event to RealEC.

Incoming data will appear in the top section of the review screen, data that cannot be mapped into the ProForm order will be displayed in the middle 'Information' section and documents will be displayed at the bottom of the screen. Checked data, notes & documents (all checked by default) will be pushed into a new or existing linked ProForm order. Data found in the Information section will be sent to the ProForm Order Notes. Accepted documents will be attached to the ProForm order and stored in SmartView, SPImage for the Enterprise/Standard versions or in Attachments & Document History for SoftPro Select users.

There are three options to attach the data into a ProForm order: create a New Order, Search for an Order or Linking To an order that is currently opened.



- Clicking the New Order button will open the ProForm New Order screen. Once the New Order information (Prefix, Suffix, Order Number, Trust account and template) has been entered click OK. Clicking OK will place the New Order number into the Linked To field on the Review screen and open the order within ProForm behind the Review screen.

- Clicking the Order Search button will open the ProForm Order Search screen. Highlight and double click the desired order number. The chosen order number will be placed into the Linked To field on the Review screen and the order will open in ProForm behind the Review screen.
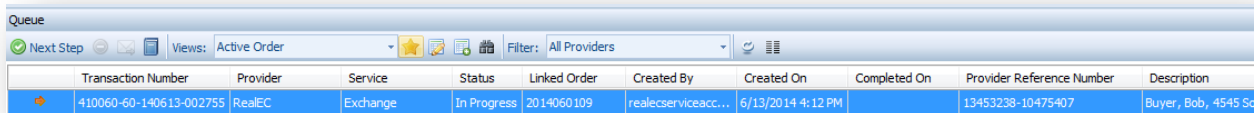
- If the ProForm order that the data should be imported into is already actively open, click the Linked To drop down and select the ProForm order number.

Once the ProForm order number has been selected and is displayed in the Linked To field, the Current value column will populate with any values currently in the ProForm order and the Field Code column can be displayed to show the field code the data will be imported into. Click Accept to send Event 130. The SoftPro 360 transaction will update to an 'In Progress' status.

**NOTE:** Transactions that are Rejected will be displayed in the SoftPro 360 queue as 'Rejected' with no further action being available to the transaction. RealEC and the lender will be notified that the order was rejected.
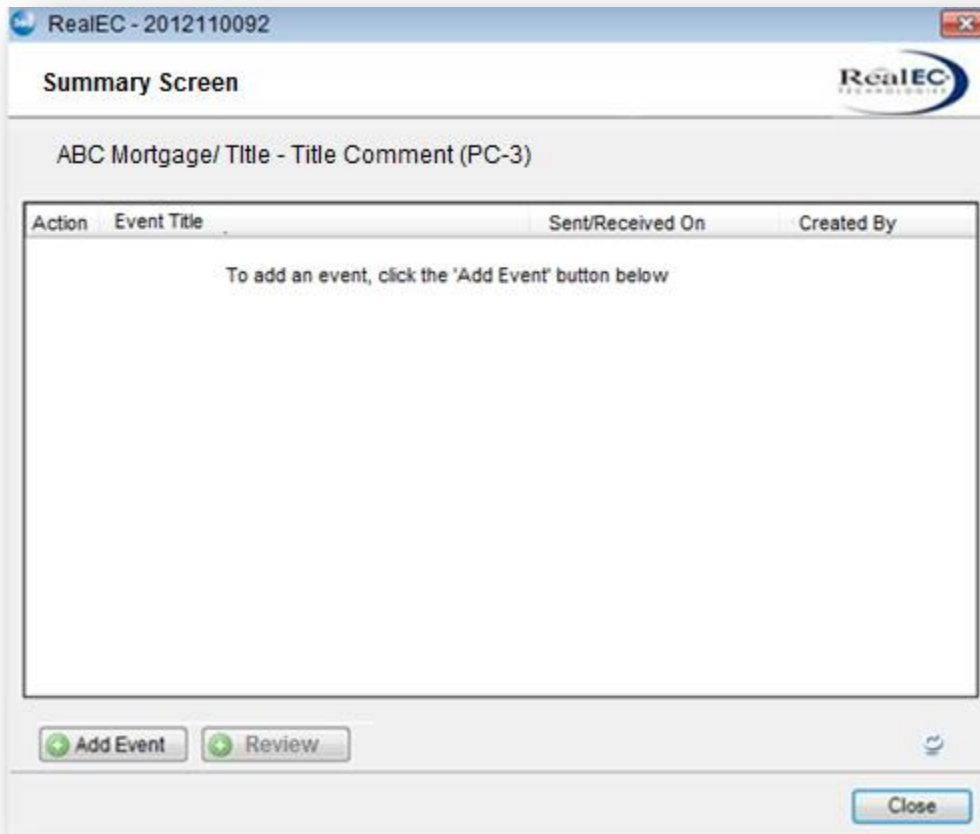
## Sending / Receiving Events

To send or receive Events, change the SoftPro 360 queue view to 'Active Order' or 'In Progress'.

| Transaction Number | Provider | Service | Status | Linked Order | Created By | Created On | Completed On | Provider Reference Number | Description |
|---|---|---|---|---|---|---|---|---|---|
| 410060-60-140613-002755 | RealEC | Exchange | In Progress | 2014060109 | realecserviceacc... | 6/13/2014 4:12 PM | | 13453238-10475407 | Buyer, Bob, 4545 So |

To see all events associated to the transaction or to send events double click or highlight and click the Next Step button. The Summary Screen will be displayed. This screen will show all events that have occurred for the transaction. Click the 'Add Event' button to open the Select Event screen.
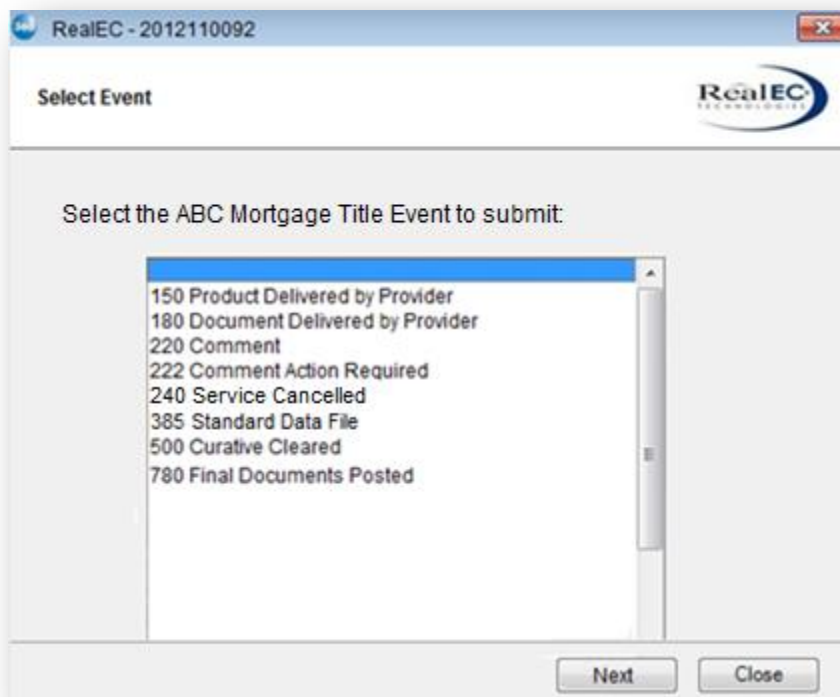
RealEC - 2012110092

**Summary Screen**

ABC Mortgage/ Title - Title Comment (PC-3)

| Action | Event Title | Sent/Received On | Created By |
|---|---|---|---|
| | To add an event, click the 'Add Event' button below | | |

Add Event   Review

Close

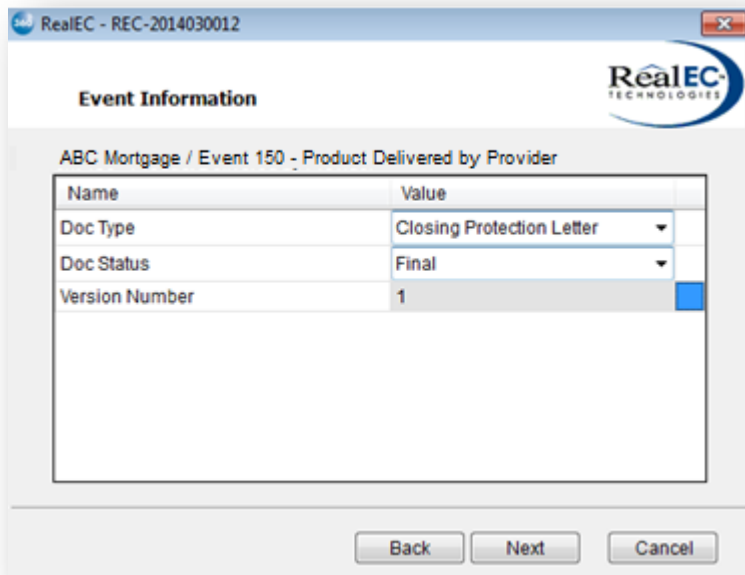Highlight the desired Event then click Next.



The Event screens will vary between the Document Delivery, Data Delivery or Comment screens depending upon the event selected.

For events sending documents the Document Delivery Event Information screen will be displayed. To attach a document either click the Browse button to browse out to a file/folder location, click Attachment to attach a document from SmartView (FNF Users) SPImage (Standard or Enterprise) or the Attachments & Document History (Select) or click the ReadyDoc button to open and attach a ReadyDoc from the ReadyDocs tree.  The Document Name will default to the name of the document attached but can be modified. Only one document can be attached. Click Next.
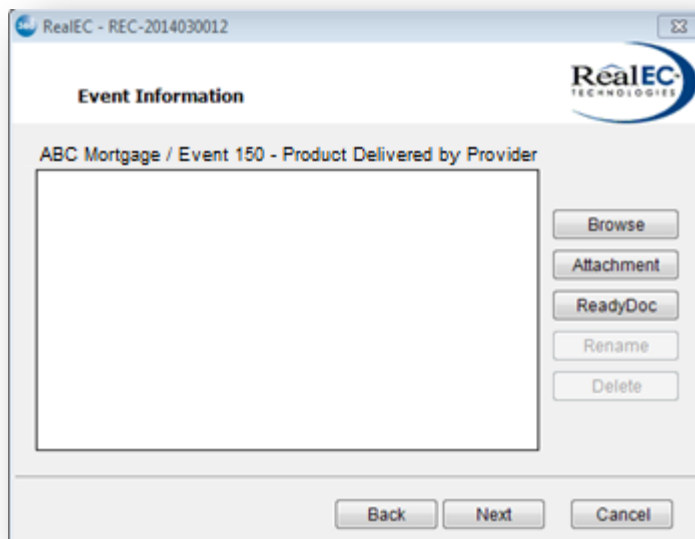
Events requiring data to be sent will have the following Event screen.  If mapped, data will pull from the linked ProForm order or can be manually added/edited.
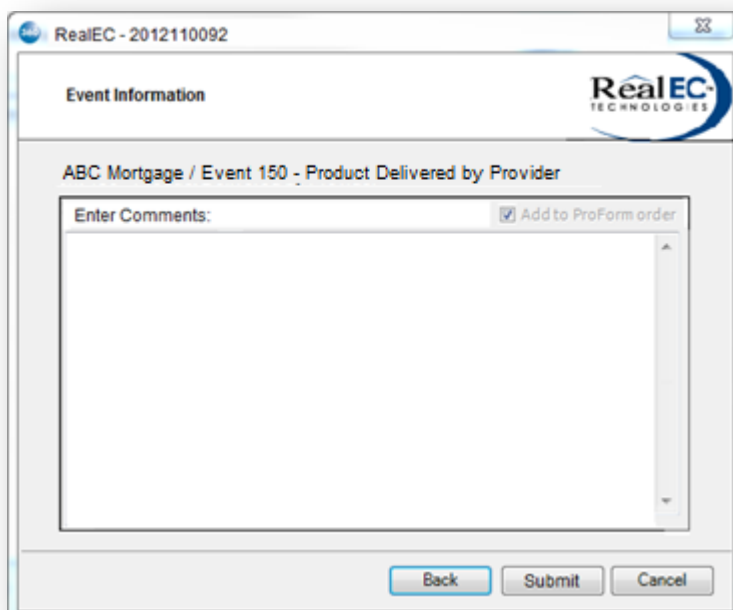


Events sending a comment will display the Comment Event screen.  Comments are manually entered on this screen and sent back into the linked ProForm order by selecting the 'Add to ProForm order' checkbox.  Click Submit to continue.



Contact information can be updated and sent to the Lender with Event 4151 – Loan Contact Update, found in all three Select Event screens.  Enter the email address of the user who will be the contact of the RealEC order and whom the Lender can reach out to.

When an event is sent the successful message will be received.  The Summary screen will update with the latest Event sent.
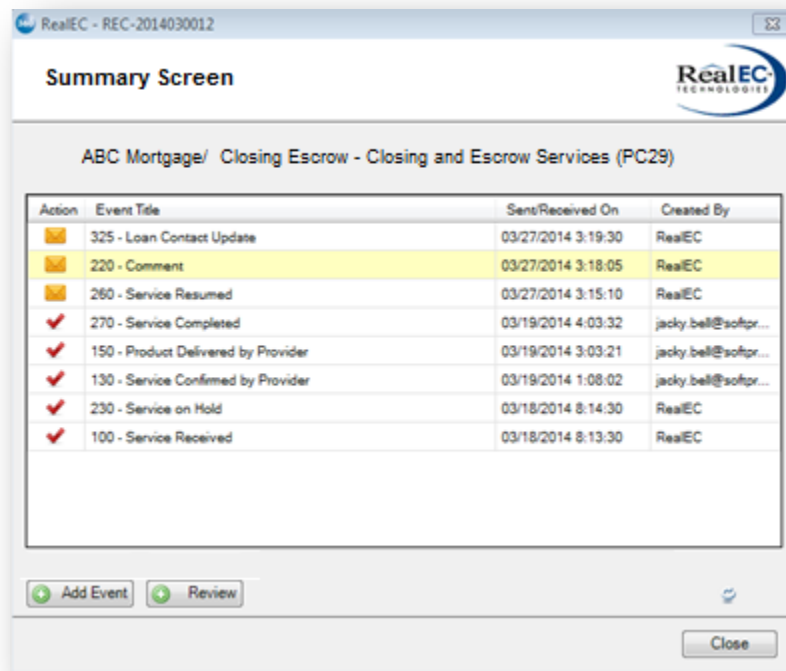


**Reviewing Events**

Incoming events will appear in the SoftPro 360 queue with an envelope ✉ and a 'Ready' status. The envelope will also be displayed in the Summary Screen to the left of the Event Title to indicate a new incoming event has been received. To view the incoming event, highlight it on the order Summary Screen then click the Review button.
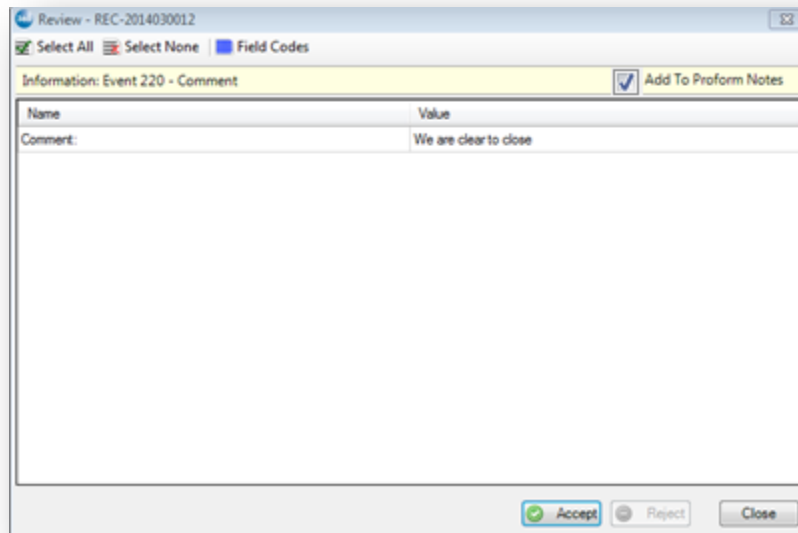


The Review screen will display a message, a document, data, a portion or all three. Click Accept to import the Comments, Data and/or Documents into the linked ProForm Order. The event in the Summary screen will update with a check mark in the left column. The transaction in the SoftPro 360 queue will update back to 'In Progress'.



Event 325 is an example of an incoming data event. This review screen shows the New Values received that will replace any current values in the linked ProForm order. By default all values will be checked to be imported into the ProForm order, click Accept to continue.

## Canceling a RealEC transaction

To cancel an order, select Event 240 – Service Cancelled from the Add Event screen.

**NOTE:**

Once an order has been canceled it cannot be re-activated.  A new order would need to be sent by the Lender.

To review details about the event that was sent or received just double click the event.

Transactions will update to a Completed status 12 months from the last activity date.

04/4/2014