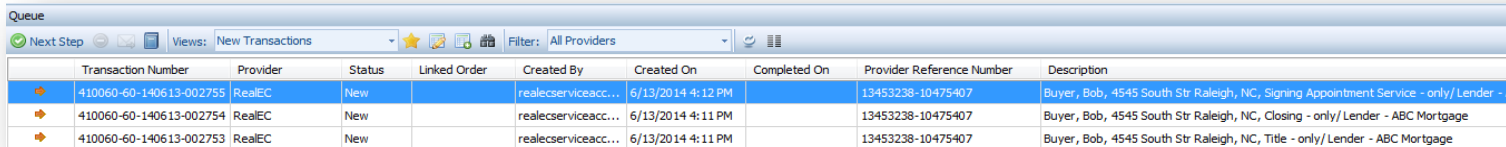


Managing RealEC within SoftPro 360

The SoftPro 360 integration with RealEC provides SoftPro 360 users the ability to receive Title, Escrow/Closing and or Document Signing order requests seamlessly from several lenders. In addition to accepting 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 back and forth throughout the life of the transaction.

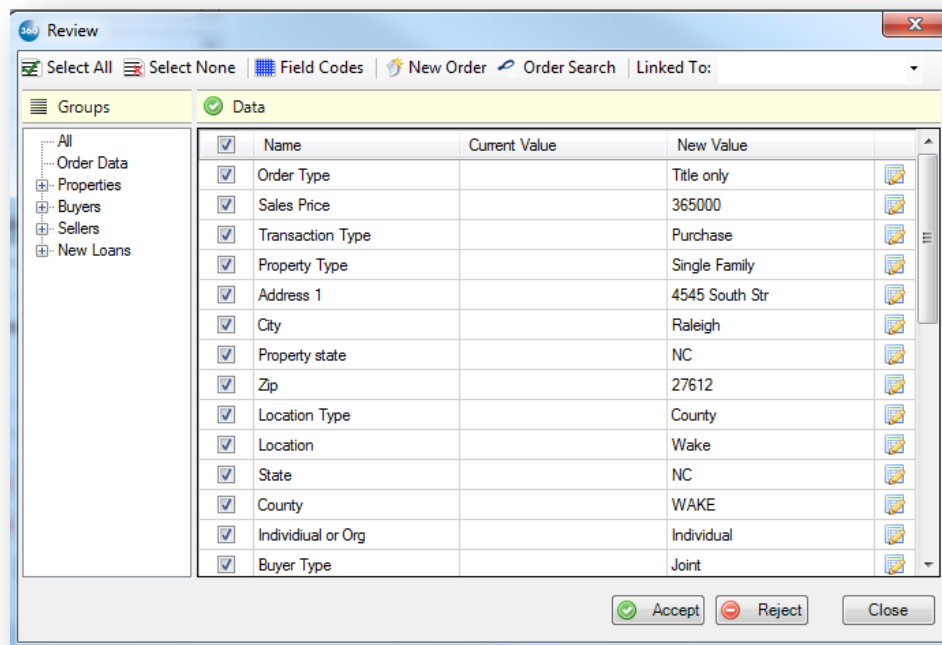
Accessing New RealEC orders in the SoftPro 360 queue

New orders sent from RealEC will appear in the SoftPro 360 queue under the view 'New Transactions'. A Title order, Closing order and Document Signing order will appear in the SoftPro 360 queue as separate transactions. The Description column will reflect which transaction contains the Title Order, the Closing Order and the Document Signing Order but they will all have the same Provider Transaction Number which is equivalent to RealEC's order number.



Transaction Number	Provider	Status	Linked Order	Created By	Created On	Completed On	Provider Reference Number	Description
410060-60-140613-002755	RealEC	New		realecserviceacc...	6/13/2014 4:12 PM		13453238-10475407	Buyer, Bob, 4545 South Str Raleigh, NC, Signing Appointment Service - only/ Lender -
410060-60-140613-002754	RealEC	New		realecserviceacc...	6/13/2014 4:11 PM		13453238-10475407	Buyer, Bob, 4545 South Str Raleigh, NC, Closing - only/ Lender - ABC Mortgage
410060-60-140613-002753	RealEC	New		realecserviceacc...	6/13/2014 4:11 PM		13453238-10475407	Buyer, Bob, 4545 South Str Raleigh, NC, Title - only/ Lender - ABC Mortgage

To review a new transaction highlight and double click the transaction or highlight and click Next Step. The Review screen will open and display all the data sent from the Lender. All data with a checkmark in the check box will be accepted into a ProForm order. If documents are sent with the RealEC order they will be displayed in the bottom section of the Review screen and can also be accepted into a ProForm order. 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.



Review

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

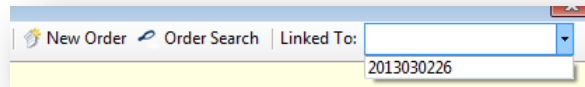
Groups

Data

Name	Current Value	New Value
Order Type		Title only
Sales Price		365000
Transaction Type		Purchase
Property Type		Single Family
Address 1		4545 South Str
City		Raleigh
Property state		NC
Zip		27612
Location Type		County
Location		Wake
State		NC
County		WAKE
Individual or Org		Individual
Buyer Type		Joint

Accept
Reject
Close

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 in ProForm.



- 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.
- 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.
- If the ProForm order that the data should be entered into is already open, click the Linked To drop down and select the ProForm order number.

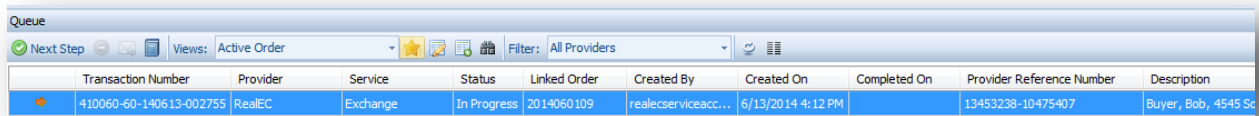
Once the ProForm order number has been selected and is displayed in the Linked To field, click Accept. Event 130 – Service Confirmed will be sent to RealEC and the SoftPro 360 / RealEC transaction will update to an 'In Progress' status.

NOTE: The order can be rejected by clicking the Reject button. 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.

If applicable, the additional RealEC orders (Title, Escrow/Closing and/or Document Signing) will also need to be Accepted or Rejected. If Accepted the steps above also apply. Generally, for the additional RealEC orders the Order Search or Linked To option will be used.

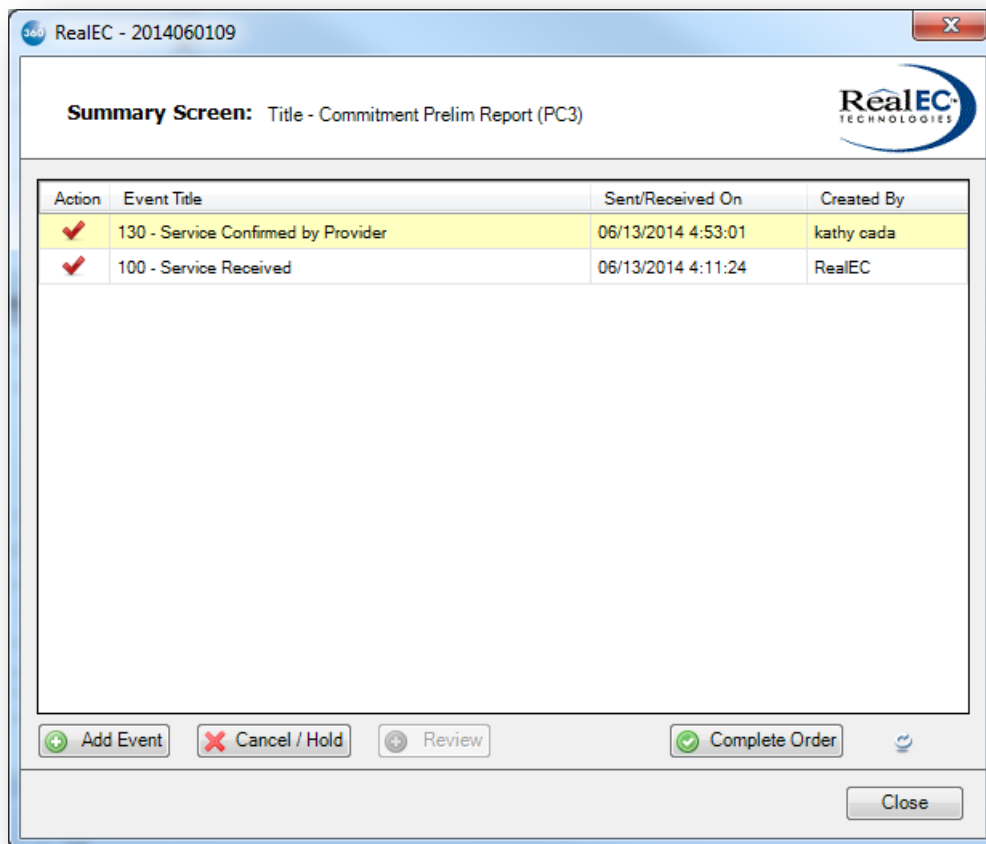
Updating an 'In Progress' RealEC transaction

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



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 St

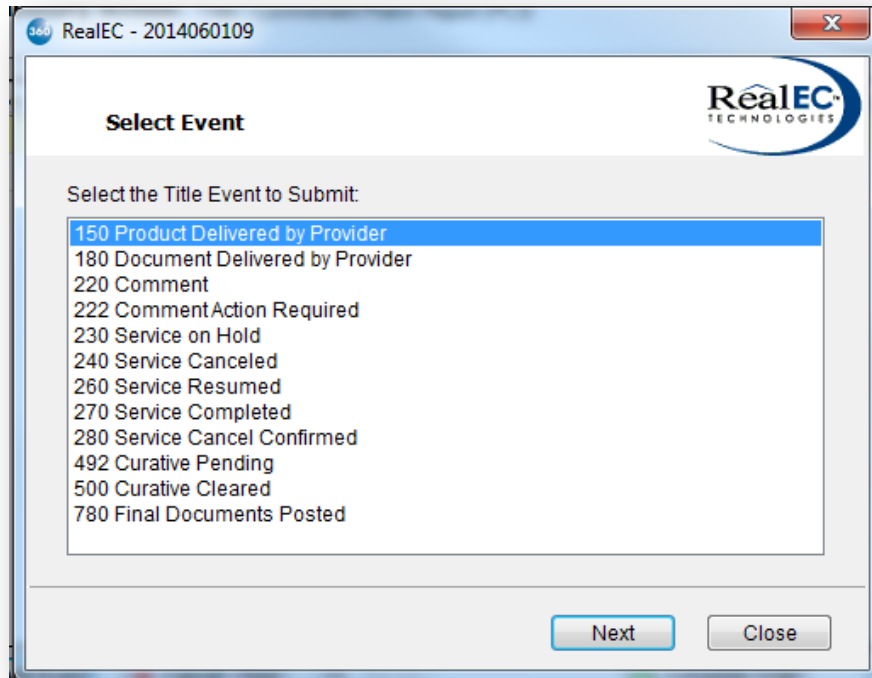
To update the transaction, click the Next Step button. The Summary Screen will be displayed. This screen will show all events that have occurred for the transaction. Click the Add Event button to open the Select Event screen.



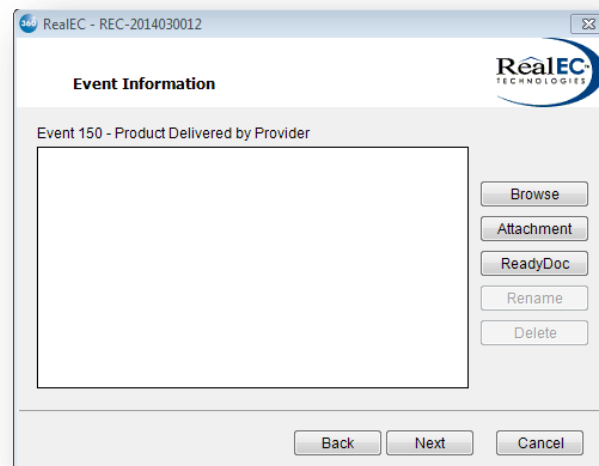
Action	Event Title	Sent/Received On	Created By
✓	130 - Service Confirmed by Provider	06/13/2014 4:53:01	kathy cada
✓	100 - Service Received	06/13/2014 4:11:24	RealEC

Buttons: Add Event, Cancel / Hold, Review, Complete Order, Close

Select the an Event then click Next.



The Event Information screen may vary depending upon the event selected, For example, for the event 150 a document can be attached. 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. Click Next.



The Event Information screen allows data to be entered for the specific event or will pull information from the ProForm Order. For example, for Event 150 select the Document type, Doc status and Version Number are displayed. For the Event 220 – Comment a comment can be entered, the Add to ProForm Order check box will allow the Comments to be added to the ProForm Order notes, click Next to continue.

RealEC - REC-2014030012

Event Information

Event 150 - Product Delivered by Provider

Name	Value
Doc Type	Closing Protection Letter
Doc Status	Final
Version Number	1

Back Next Cancel

RealEC - REC-2014030012

Event Information

Event 220 - Comment

Enter Comment ☐ Add to ProForm order

Enter comments here

Back Next Cancel

The transaction will be submitted and once completed you will receive the successful message and have the option to add another event or close the screen. The Summary screen will update with the latest Event sent.

RealEC - REC-2014030012


Successfully sent data to RealEC.

The data has been delivered to RealEC.

SOFTPRO


Add Event Close









Reviewing Events and Messages for a RealEC transaction






An envelope  displayed in the Summary Screen to the left of the Event Title indicates a message, whether incoming or outgoing, is attached to the transaction. To view the message, highlight the message on the order Summary Screen and click the Review button to open the Review screen.

RealEC - REC-2014030012

Summary Screen: Closing/Escrow - Closing and Escrow Services (PC29)



Action	Event Title	Sent/Received On	Created By
	325 - Loan Contact Update	03/27/2014 3:19:30	RealEC
	220 - Comment	03/27/2014 3:18:05	RealEC
	260 - Service Resumed	03/27/2014 3:15:10	RealEC
	270 - Service Completed	03/19/2014 4:03:32	jacky.bell@softpr...
	150 - Product Delivered by Provider	03/19/2014 3:03:21	jacky.bell@softpr...
	130 - Service Confirmed by Provider	03/19/2014 1:08:02	jacky.bell@softpr...
	230 - Service on Hold	03/18/2014 8:14:30	RealEC
	100 - Service Received	03/18/2014 8:13:30	RealEC

 Add Event  Cancel / Hold  Review  Complete Order 

Close

The Review screen will display the message, which can be added to the ProForm Order. The 'Add to ProForm Notes' check box will be checked by default adding the Comment to the notes section within the ProForm order. Click Accept to send the Comments to the ProForm order Notes and to be taken back to the Summary screen.

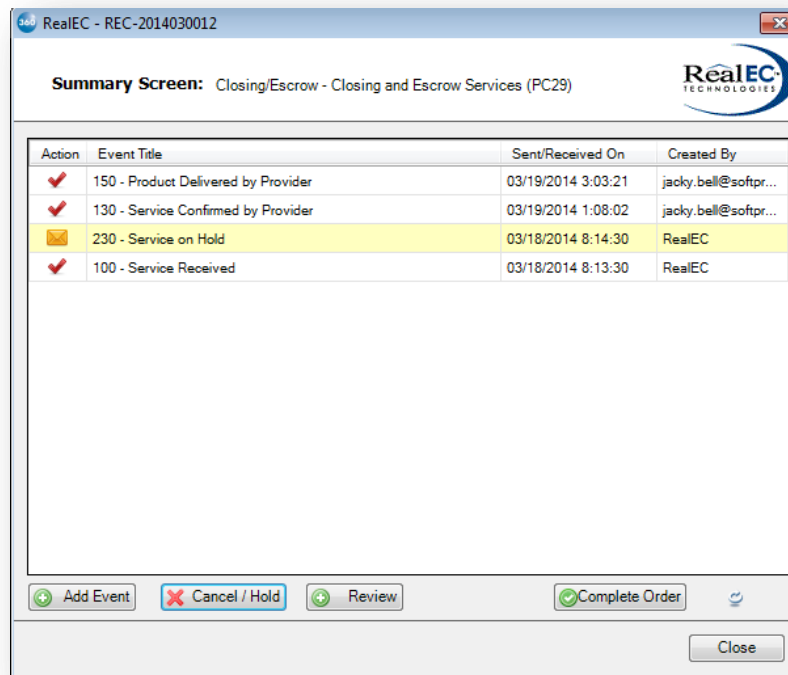
The screenshot shows a software window titled "Review - REC-2014030012". At the top, there are buttons for "Select All", "Select None", and "Field Codes". Below this is a yellow header bar with the text "Information: Event 220 - Comment" and a checked checkbox labeled "Add To Proform Notes". The main area contains a table with two columns: "Name" and "Value". The first row has "Comment:" in the "Name" column and "We are clear to close" in the "Value" column. Below the table is a large empty text area. At the bottom right, there are three buttons: "Accept" (with a green checkmark icon), "Reject" (with a grey circle icon), and "Close".

Depending on the event that has been received there maybe data to be accepted into the ProForm order, for example event 325 is for a Loan Contact Update. This review screen shows the New Values received and the Current Value that is in the ProForm Order. By default all values will be selected, click Accept to continue.

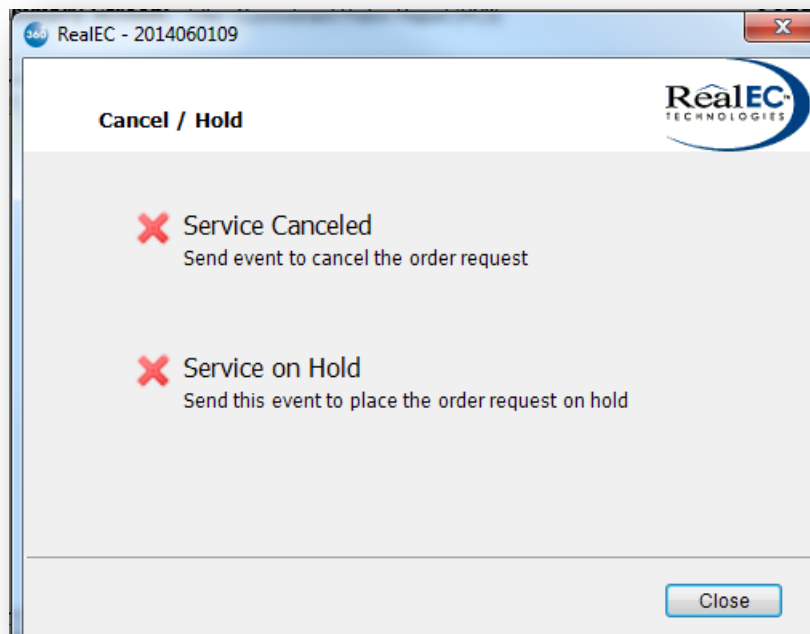
The screenshot shows a software window titled "Review - REC-2014030012". At the top, there are buttons for "Select All", "Select None", and "Field Codes". Below this is a yellow header bar with the text "Information: Event 325 - Loan Contact Update" and a checked checkbox labeled "Add To Proform Notes". On the left side, there is a "Groups" panel with a tree view showing "All" and "Order Data". The main area contains a table with four columns: "Name", "Current Value", "New Value", and an icon column. The first row has a checked checkbox in the "Name" column. The subsequent rows are: "Lender Contact Title", "Loan Contact" (with "sp360v2 testoust2" in the "New Value" column), "Loan Contact Day Phone" (with "222 222-2222" in the "New Value" column), and "Loan Contact Email" (with "nothing@realec.com" in the "New Value" column). Below the table is a large empty text area. At the bottom right, there are three buttons: "Accept" (with a green checkmark icon), "Reject" (with a grey circle icon), and "Close".

Canceling or Placing a RealEC transaction on Hold

To cancel or place an order on hold, click the Cancel/Hold button.



The Cancel/Hold screen will give you the option to place the order request on Hold and send the Service on Hold Event to RealEC or to Cancel the Order request.



To place an order on hold, click Service on Hold. The next screen will be the Event Information screen to send the reason for placing the order on hold. Select the reason from the drop down box; this is a required field that must be entered to place the order on hold. Click Next.

The screenshot shows the 'Event Information' window for 'Event 230 - Service on Hold'. It features a table with two columns: 'Name' and 'Value'. The 'Reason Code' is selected in the 'Name' column, and a dropdown menu is open in the 'Value' column, displaying the following options: '6 Other', '34 Verify loan amount', '60 Documents not properly executed', and '61 Missing required documents'. The '60 Documents not properly executed' option is highlighted. At the bottom of the window are three buttons: 'Back', 'Next', and 'Cancel'.

Name	Value
Reason Code	6 Other 34 Verify loan amount 60 Documents not properly executed 61 Missing required documents

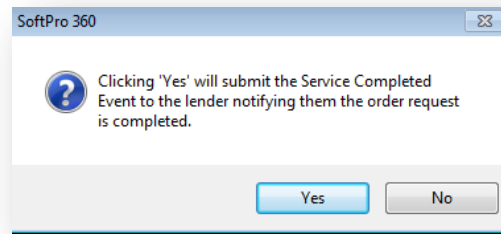
Completing a RealEC transaction

To complete a transaction click the Complete Order button found on the Summary Screen.

The screenshot shows the 'Summary Screen' for 'Closing/Escrow - Closing and Escrow Services (PC29)'. It displays a table with four columns: 'Action', 'Event Title', 'Sent/Received On', and 'Created By'. The table contains four rows of data. The third row, '230 - Service on Hold', is highlighted in yellow. At the bottom of the window are five buttons: 'Add Event', 'Cancel / Hold', 'Review', 'Complete Order', and 'Close'.

Action	Event Title	Sent/Received On	Created By
✓	150 - Product Delivered by Provider	03/19/2014 3:03:21	jacky.bell@softpr...
✓	130 - Service Confirmed by Provider	03/19/2014 1:08:02	jacky.bell@softpr...
✉	230 - Service on Hold	03/18/2014 8:14:30	RealEC
✓	100 - Service Received	03/18/2014 8:13:30	RealEC

A confirmation message will be displayed. Click Yes to complete the order.



NOTE: Although the transaction will be in a completed status and the completed event is sent to RealEC, both RealEC & the user can still update the transaction with all events up to 6 months from the last event date.