

## Processing a Digital Opening Package

The Start inHere Digital Opening Package (DOP) initiates the collection of the buyer's and seller's personal information and captures certain financial and property details. Use the checklist as a quick reference to create and distribute a DOP.

If needed, refer to the job aid, *SoftPro 360 Start inHere – Manually Processing a Digital Opening Package* for a detailed overview of the Start inHere process.

### Order Entry screen

- ☐ Verify/enter the **Escrow officer/closer**
- ☐ Verify/enter the **Property address**
- ☐ Verify/enter Contacts
  - › **Buyer/Borrower**; requires names and contact information (i.e., home phone, cell, email address)
  - › **Seller**; requires names and contact information (i.e., home phone, cell, email address)
  - › **Settlement Agent**
  - › **Title Company** and/or **Escrow Company**

### Documents

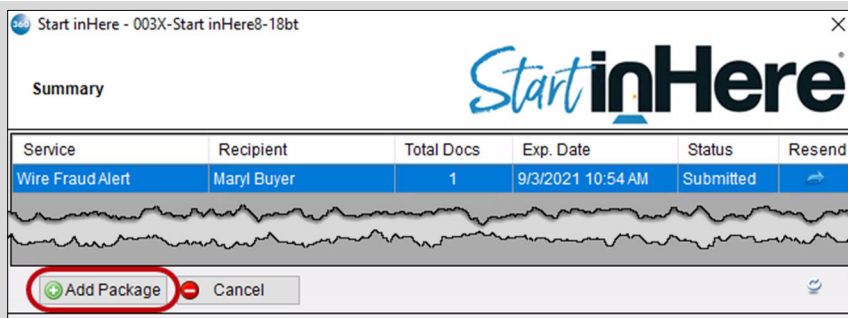
- ☐ **Publish** the applicable documents to smartview
  - › **WireSafe Fraud Alert (eSign)** document (buyers) to the **Accounting** folder
  - › **Payoff Authorization (eSign)** documents (sellers or borrowers on a refinance) to the folder used by your operation

**IMPORTANT:** 360 searches for the documents in the specified smartview folder. If not found, a warning message is shown and you cannot proceed. Click the **Cancel** button and upload the missing document.

### Start inHere – Digital Opening Package

- ☐ Create the Digital Opening Package
  - ☐ Select **On behalf of** Contact
  - ☐ Verify **Buyer** and/or **Seller** Contacts selected; if needed, uncheck those not to be included
  - ☐ **Submit** the package

**NOTE:** If a package was previously created, the **Summary window** opens. To create a new package, click the **Add package** button.



Service	Recipient	Total Docs	Exp. Date	Status	Resend
Wire Fraud Alert	Maryl Buyer	1	9/3/2021 10:54 AM	Submitted	

**Add Package** **Cancel**

- ☐ Close the **Summary** window

### 360 Queue

- ☐ **Review** and **Accept** completed package where **Status = Ready**