# Processing a Digital Opening Package

The Start inHere Digital Opening Package (DOP) initiates the collection of the buyer's and seller's personal or organization/entity information and captures certain financial and property details. Additionally, the buyers are guided through a workflow outlining the dangers of wire fraud, provides wiring instructions and requires an electronic signature. If the **Add Mobile Deposit** check box is checked when sending the package, the buyers have the option to capture an image of their earnest money deposit check and submit it electronically. Sellers (and borrowers on a refinance) are provided the Payoff Authorization form which also requires an electronic signature.

**IMPORTANT**: The customer has 7 days to complete a DOP package before the email link expires. If the package is not completed before the 7-day expiration, and the order is closed or cancelled, reminder notifications continue to be sent to the customer. To avoid these notifications, the in progress DOP package or mobile deposit 360 transaction **must be manually cancelled**.

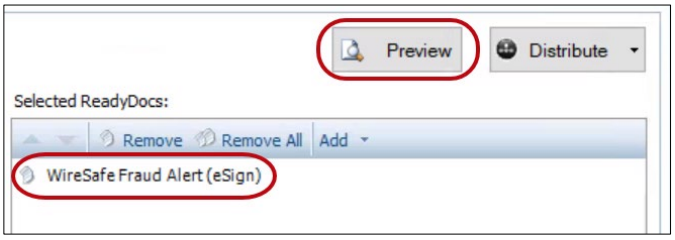
Follow these steps to create and distribute a DOP and include the Mobile Deposit step in the package to the buyers.

From SoftPro Select,

1. Open the applicable SoftPro order
2. Verify/enter the,
   a) **Escrow officer/Closer**
   b) **Property address**
   c) **Buyer/Borrower**; names and contact information (Home phone, Cell, Email address)
   d) **Seller**: names and contact information (Home phone, Cell, Email address)
   e) **Settlement Agent, Title Company** and/or **Escrow Company**

**NOTE**: If an Organization is selected, a **Corporate officer/signee** must be entered with an email address and phone number to receive the package. The questions displayed in the package are based on this selection and are then relevant to an organization versus an individual.

3. Click the **Documents** button
4. **Preview/Publish** the applicable document,
   - **WireSafe Fraud Alert (eSign)** document (buyers)
   - **Payoff Authorization (eSign)** documents (sellers or borrowers on a refinance)




2. Select the applicable smartVIEW folder

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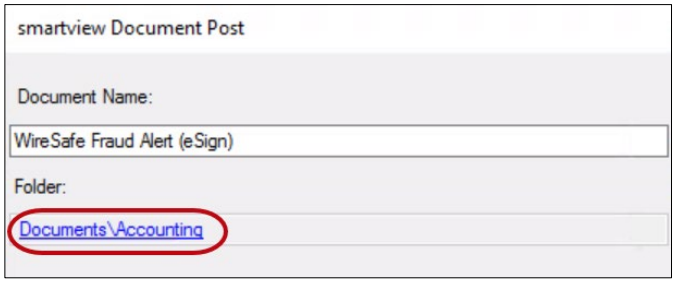
- **WireSafe Fraud Alert (eSign) = Accounting**
- **Payoff Authorization (eSign) =** the folder typically used in your operation

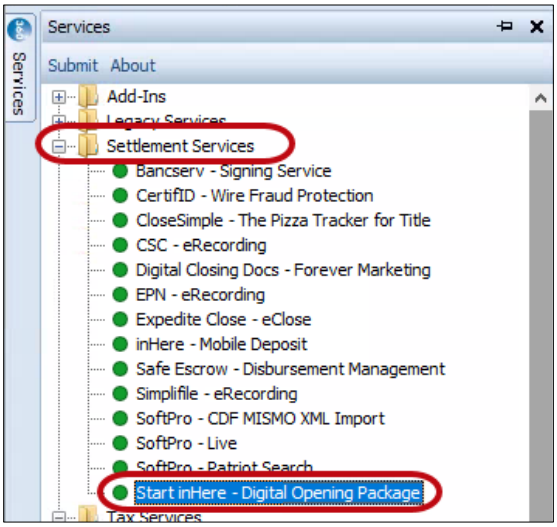
3. Click the **OK** button to complete upload




## Creating the Start inHere Digital Opening Package

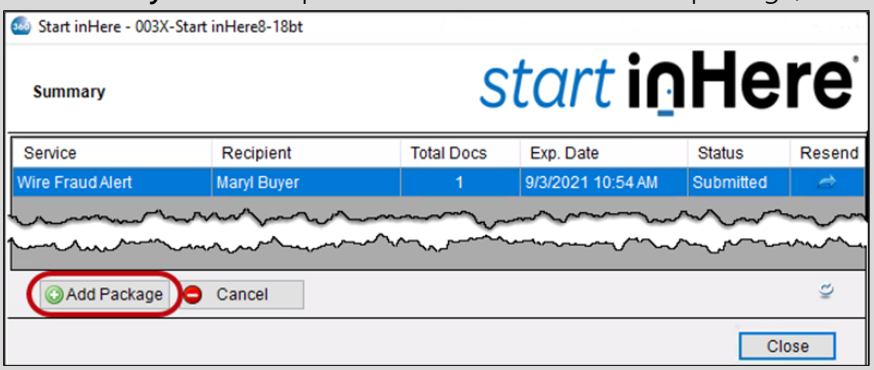
1. From the **360** ribbon, click the **Services** button

2. Expand the **Settlement Services** folder
3. Double-click the **Start inHere – Digital Opening Package** entry




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

a. Click the **Add package** button
b. Continue on with next steps

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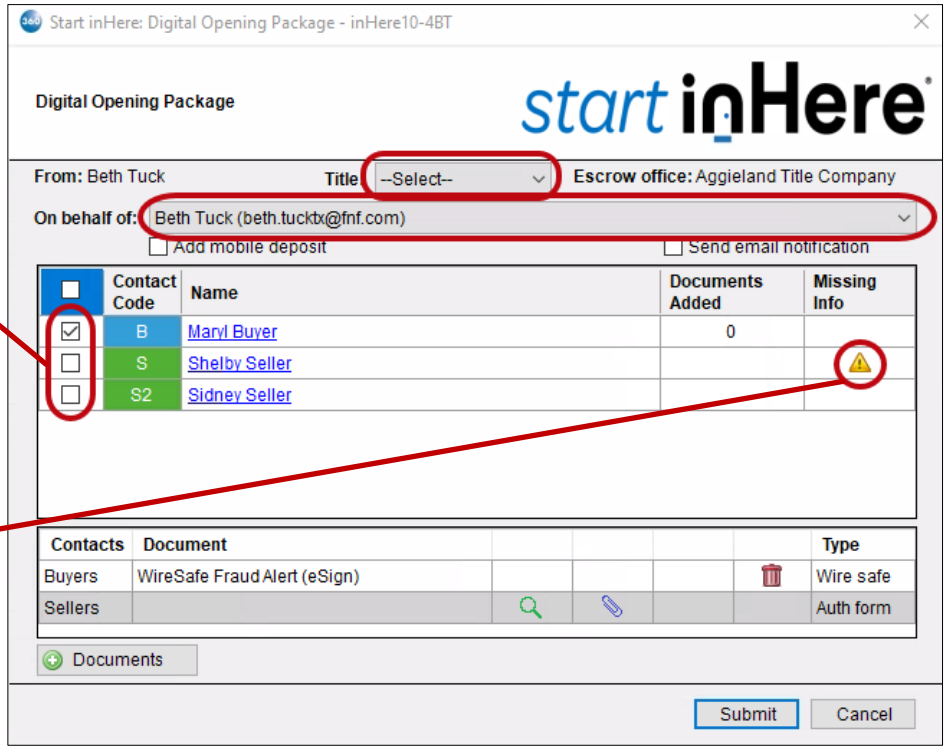
From the **Digital Opening Package** window,

4. If applicable, select the,
   a) **Title** – for the sender (selected in **step b**)
   b) **On behalf** – sender email

The grid shows all Buyers and Sellers with all Buyer Contacts selected by default.

5. Uncheck applicable Contacts as needed

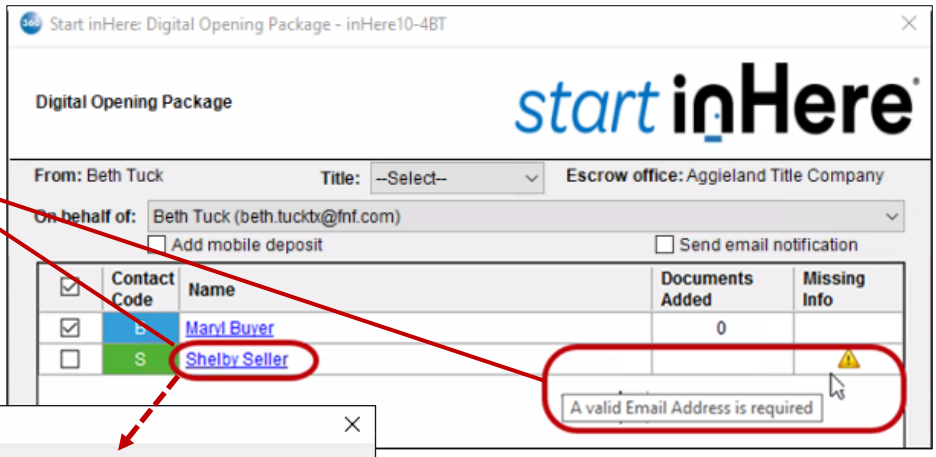
If you see the **Missing Info** icon continue to next steps, if all required information is entered skip to Page 4.

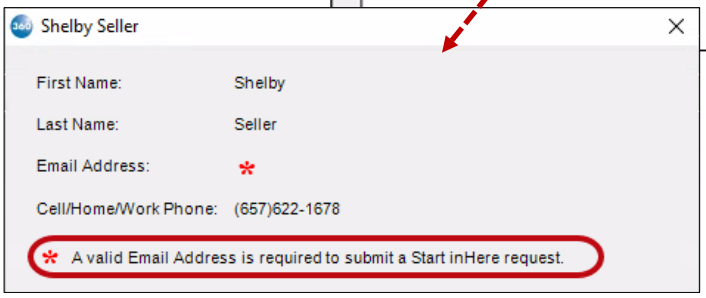



## Missing Information

In our example, the second buyer is not checked and a **Missing Information** icon is shown.

Click the corresponding buyer link or hover over the icon to see what required information is missing.

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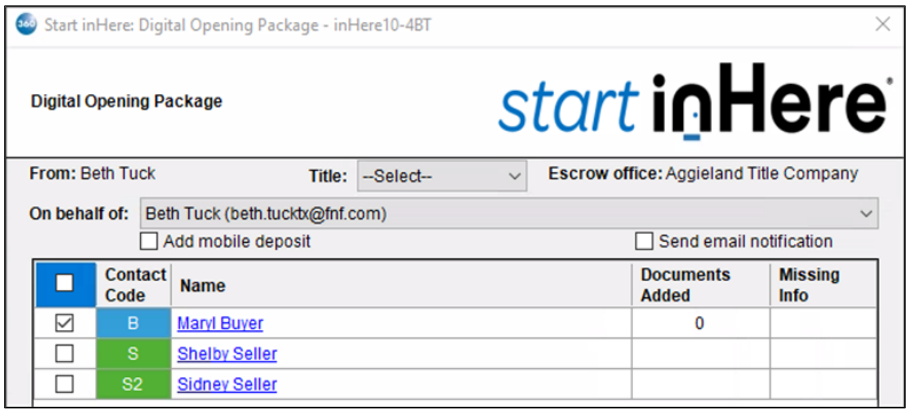
If the party with the missing information should be included,

1. Click the **Cancel** button
2. Navigate to the corresponding Contacts screen
3. Enter the missing information
4. Re-initiate the process from **step 2** (page 1)

The **Digital Opening Package** screen shows all Buyer check boxes as checked and the **Missing Information** icon is no longer shown.




If all required information is entered, the system automatically imports the **WireSafe Fraud Alert (eSign)** or (when the Seller check box is checked) **Payoff Authorization (eSign)** document from smartVIEW.

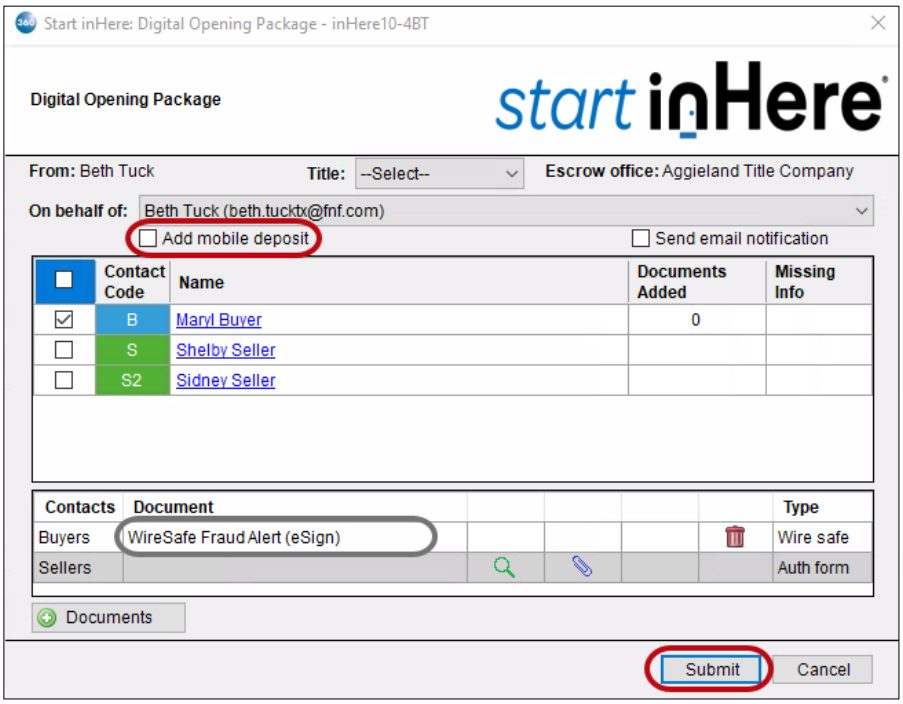
**NOTE**: The software searches for the **WireSafe Fraud Alert (eSign)** document (in the **Accounting** folder) and the **Payoff Authorization (eSign)** document (in all folders). If not found in smartVIEW, a warning message is shown, and you cannot proceed.

Click the **Cancel** button and upload the missing document.

5. Click the **Add Mobile Deposit** check box to include this step in the package

   **IMPORTANT**: If your trust account has not been converted to FTNI Remote Desktop Capture this check box **must** be unchecked. Check with your Escrow Manager if you need to verify your banking software is compatible.

6. Click the **Submit** button

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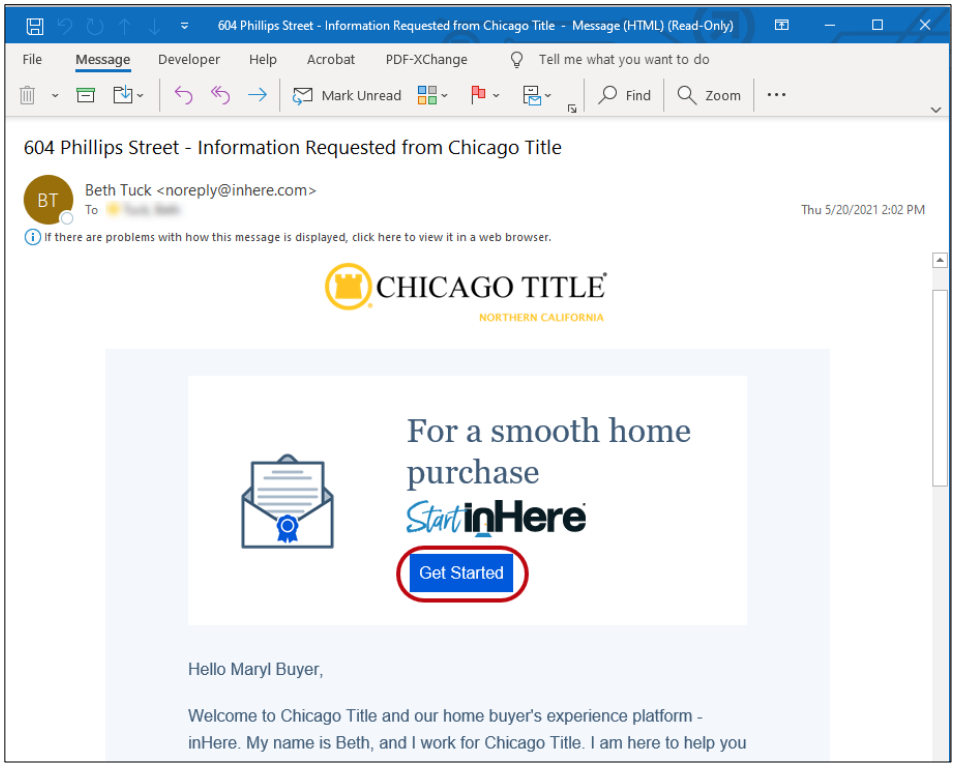
An email notification is sent to the recipient(s) with a **Get Started** link. This link is only accessible in the United States and Canada.

The process takes approximately five minutes for each person to complete.



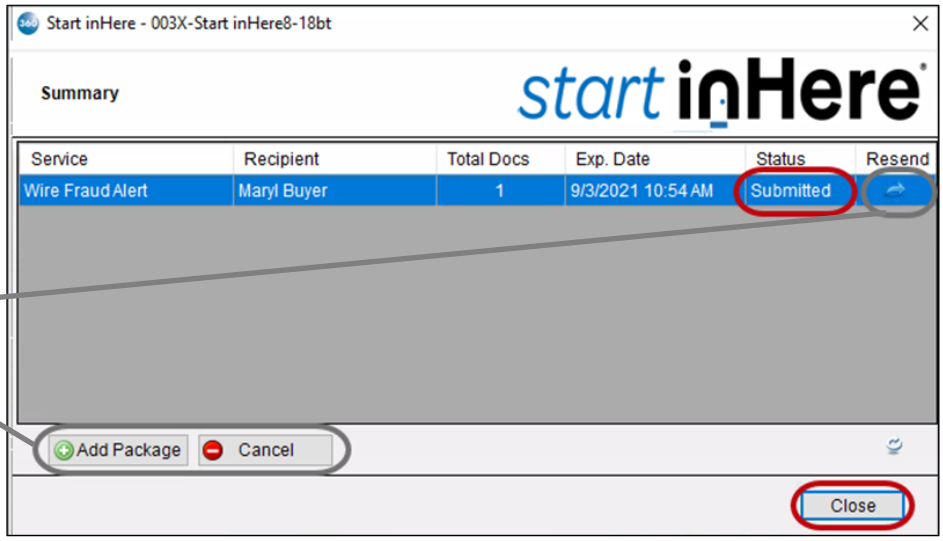

Once the package is sent, the **Summary** screen shows the package **Status** = **Submitted**.

From this screen you can,

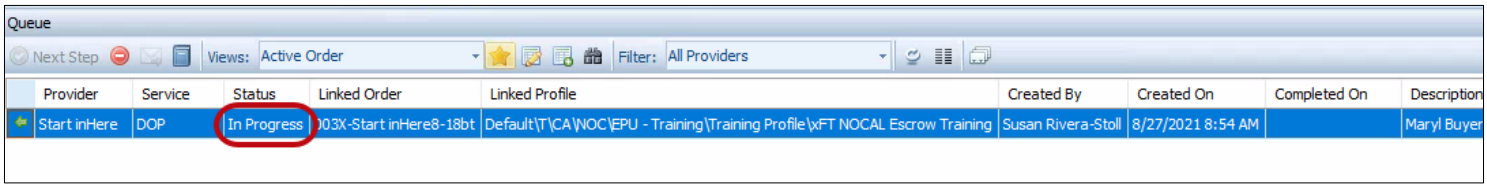
- **Resend**
- **Add Package**
- **Cancel** a package

If you are done,

7. Click the **Close** button




The **360 Queue** shows the **Status** as **In Progress**.

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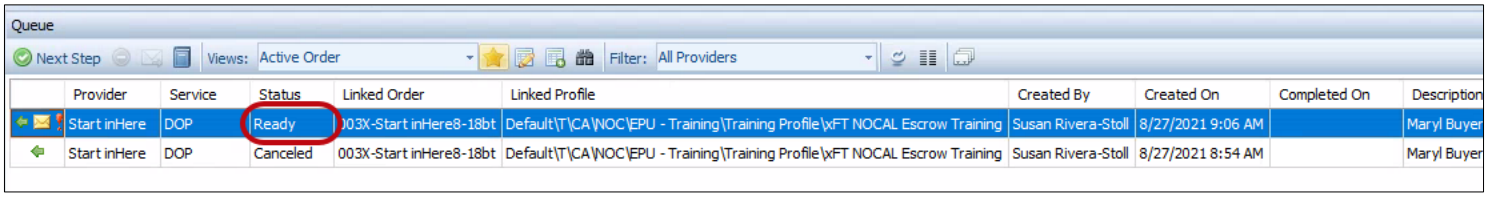
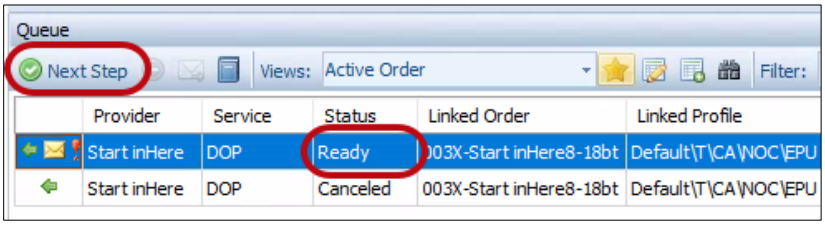
**NOTE**: Refer to the job aid, ***SoftPro 360 Start inHere – Accepting Mobile Deposits in Your Order***, to track and complete the steps for mobile deposits submitted through Start inHere.

Once the recipient(s) complete the eSign process, Start inHere returns the data and documents and sets the **Status** to **Ready**.




8. Highlight the entry you wish to process
9. Click the **Next Step** button (or double-click the entry)

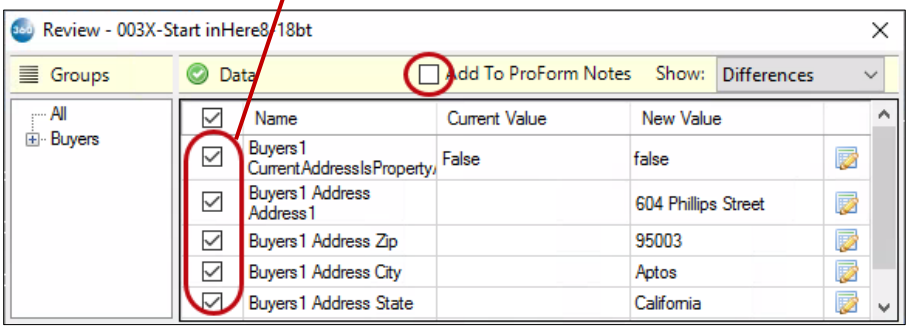



The **Review** window opens showing,

- **Data** – by default all data imports into the corresponding fields in your order; if you do not wish to import information for a specific entry, uncheck the corresponding check box

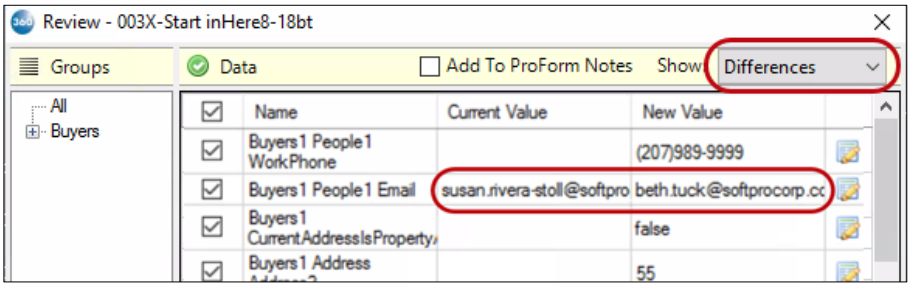
If the **Add to ProForm Notes** check box,

- is unchecked (default setting) existing order data is overwritten
- is checked, the information is written to the **Order Notes** screen only




If the **Show** drop-down shows,

- **Differences** - information entered by the recipient is shown and only the differing order information is shown

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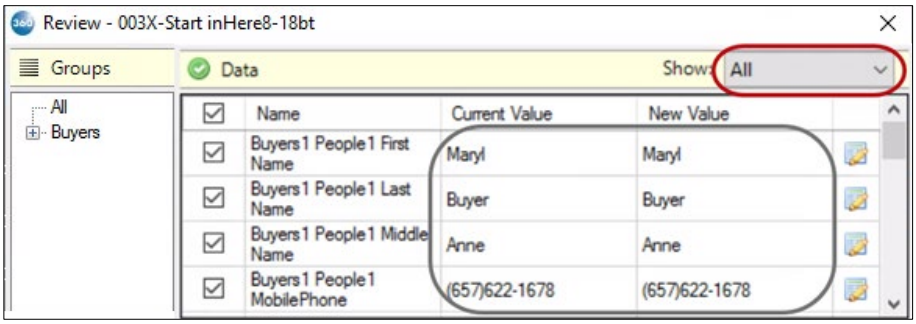
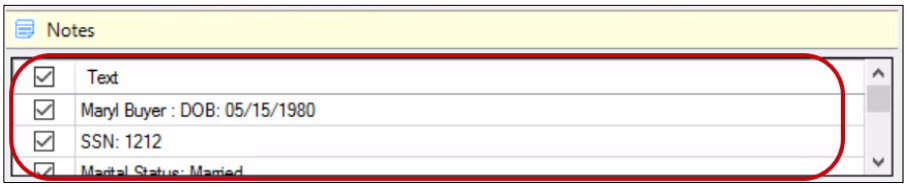
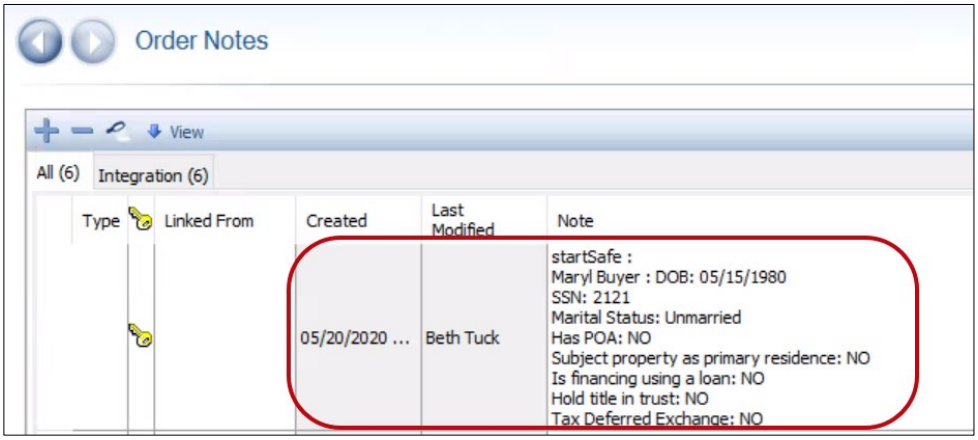
- **All** - information entered by the recipient and all corresponding information entered in the order are shown

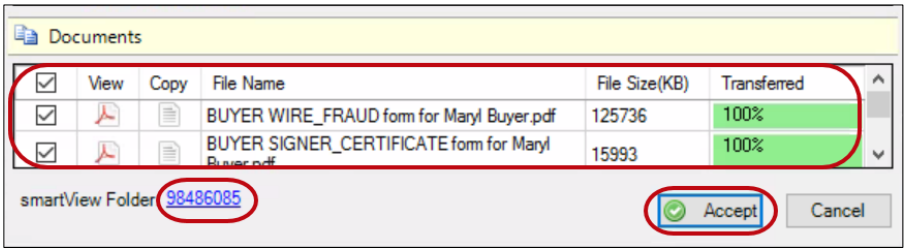



- **Notes** - all information is written to the **Order Notes** screen




- **Documents** - all documents import to the linked smartVIEW order
  - » Click the **Folder** link if you wish to select a specific folder in smartVIEW




10. Click the **Accept** button to complete

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