

Processing an Automated Digital Opening Package

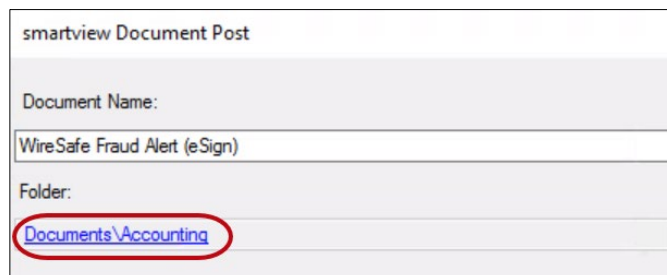
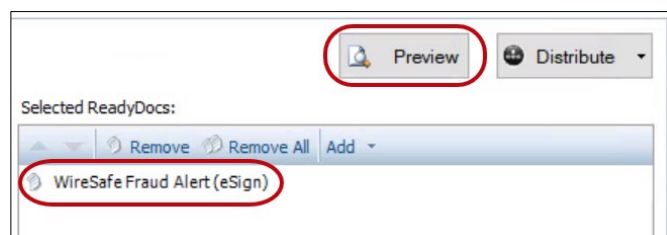
The Start inHere Digital Opening Package (DOP) initiates the collection of the buyer's and seller's personal information and captures certain financial and property details. Additionally, the buyers are guided through a workflow outlining the dangers of wire fraud, provides wiring instructions and requires an electronic signature. 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.

From SoftPro Select,

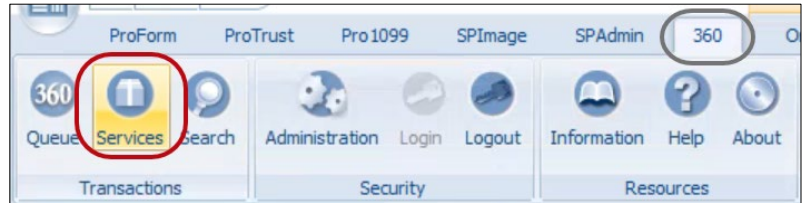
1. Open the applicable SoftPro order
2. Verify/enter the,
 - a) **Escrow officer/Closer**
 - b) **Property address**
 - c) **Buyer/Borrower**; names and contact information (Home phone, Cell, Email address)
 - d) **Seller**; names and contact information (Home phone, Cell, Email address)
 - e) **Settlement Agent, Title Company and/or Escrow Company**
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)
5. Select the applicable smartview folder
 - › **WireSafe Fraud Alert (eSign) = Accounting**
 - › **Payoff Authorization (eSign)** = the folder typically used in your operation
6. Click the **OK** button to complete upload



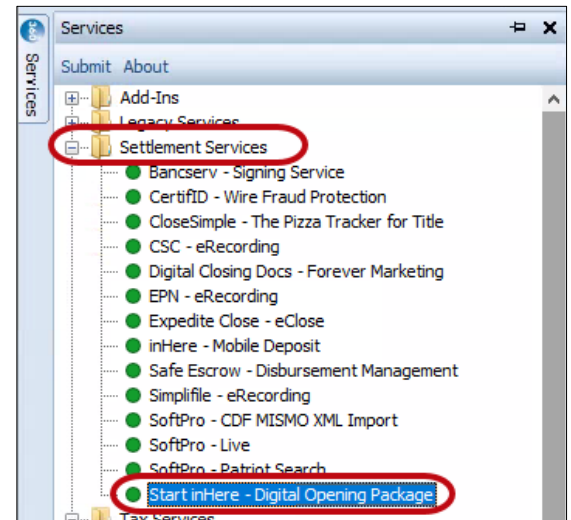
Processing an Automated Digital Opening Package

Creating the Start inHere Digital Opening Package

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



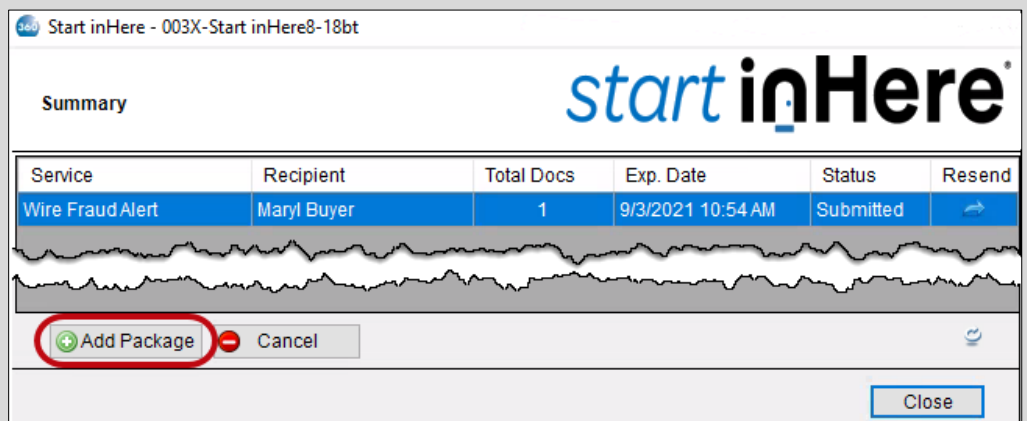
2. Expand the **Settlement Services** folder
3. Double-click the **Start inHere – Digital Opening Package** entry



From the **Digital Opening Package** window,

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 with **step 4**




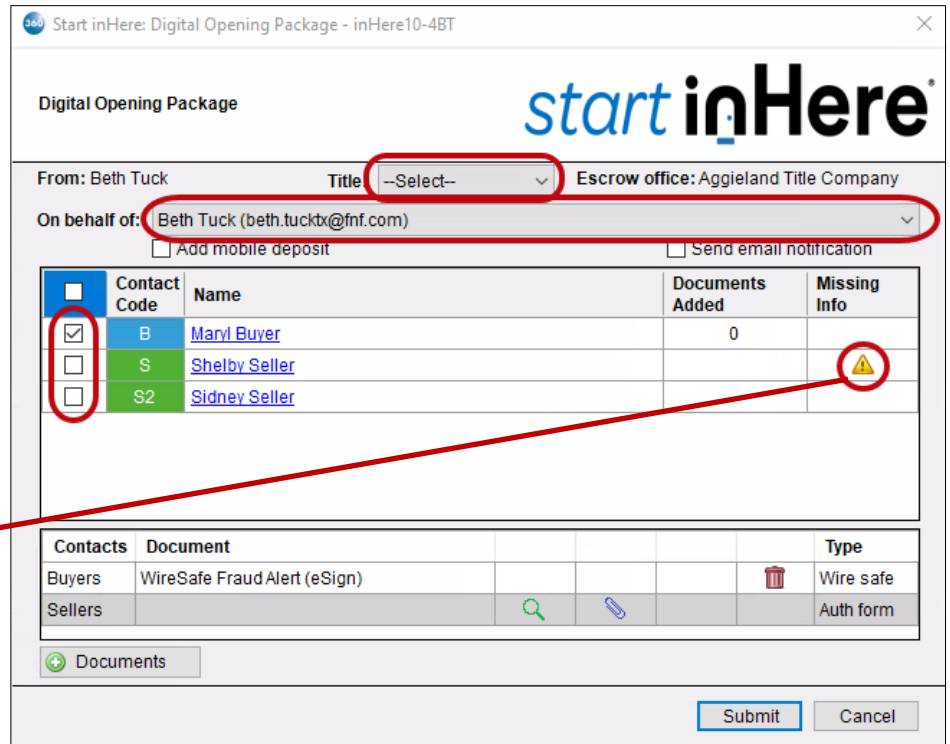
Processing an Automated Digital Opening Package

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


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

8. Uncheck applicable Contacts as needed

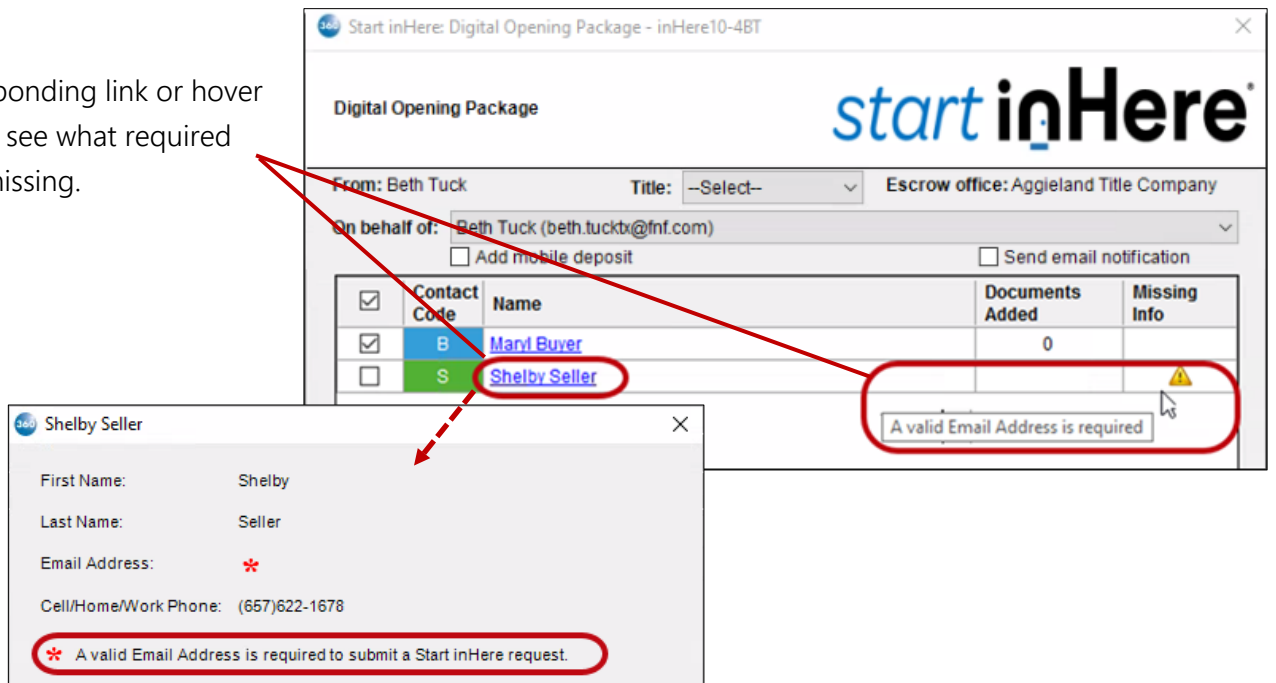
If you see the **Missing Info**  icon continue to next steps if all required information is entered skip to [Page 4](#).



Missing Information

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


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

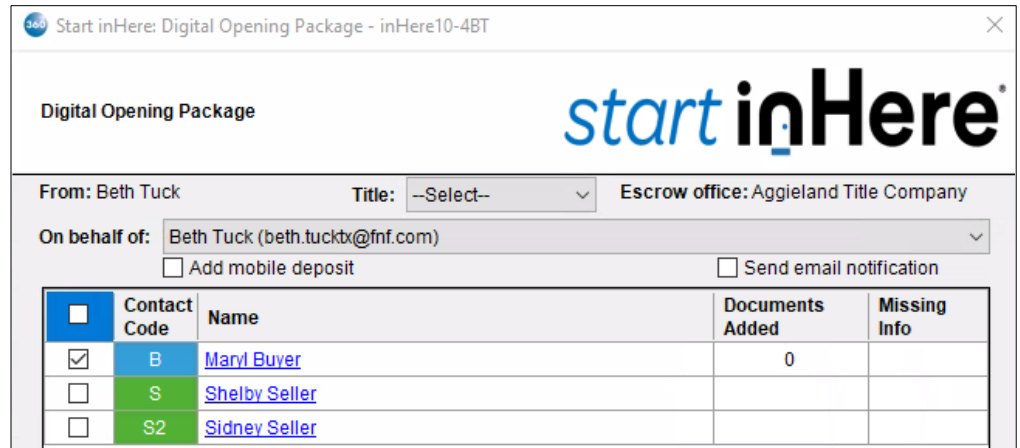


Processing an Automated Digital Opening Package

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 for the seller.



Start inHere: Digital Opening Package - inHere10-4BT

Digital Opening Package

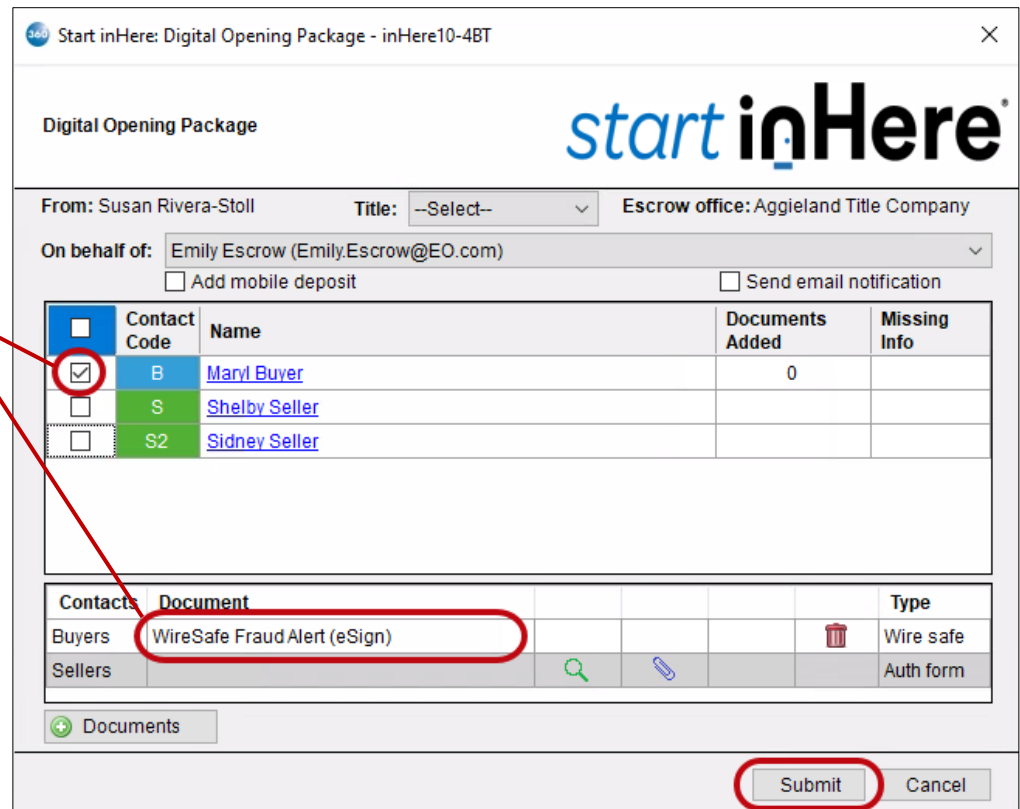
From: Beth Tuck Title: --Select-- Escrow office: Aggeland Title Company

On behalf of: Beth Tuck (beth.tucktx@fnf.com)

☐ Add mobile deposit ☐ Send email notification

<input type="checkbox"/>	Contact Code	Name	Documents Added	Missing Info
<input checked="" type="checkbox"/>	B	Maryl Buyer	0	
<input type="checkbox"/>	S	Shelby Seller		
<input type="checkbox"/>	S2	Sidney Seller		

When 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.



Start inHere: Digital Opening Package - inHere10-4BT

Digital Opening Package

From: Susan Rivera-Stoll Title: --Select-- Escrow office: Aggeland Title Company

On behalf of: Emily Escrow (Emily.Escrow@EO.com)

☐ Add mobile deposit ☐ Send email notification

<input type="checkbox"/>	Contact Code	Name	Documents Added	Missing Info
<input checked="" type="checkbox"/>	B	Maryl Buyer	0	
<input type="checkbox"/>	S	Shelby Seller		
<input type="checkbox"/>	S2	Sidney Seller		

Contacts	Document	Type
Buyers	WireSafe Fraud Alert (eSign)	Wire safe
Sellers		Auth form

Processing an Automated Digital Opening Package

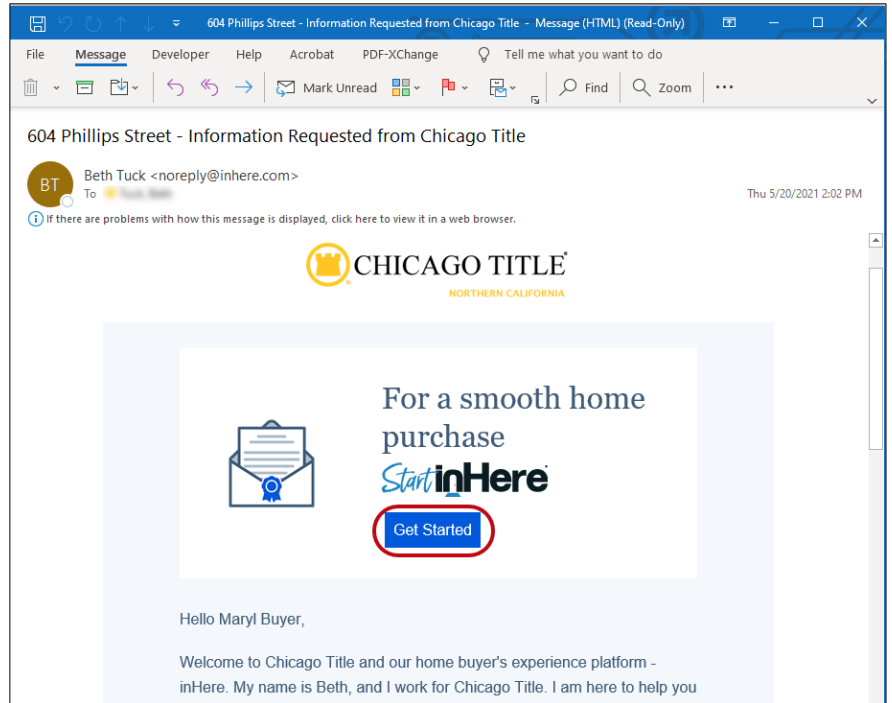
NOTE: The software searches for the **WireSafe Fraud Alert (eSign)** document (in the **Accounting** folder) and the **Payoff Authorization (eSign)** document (in all folders). If not found in smartview, a warning message is shown and you cannot proceed.

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

1. Click the **Submit** button

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.



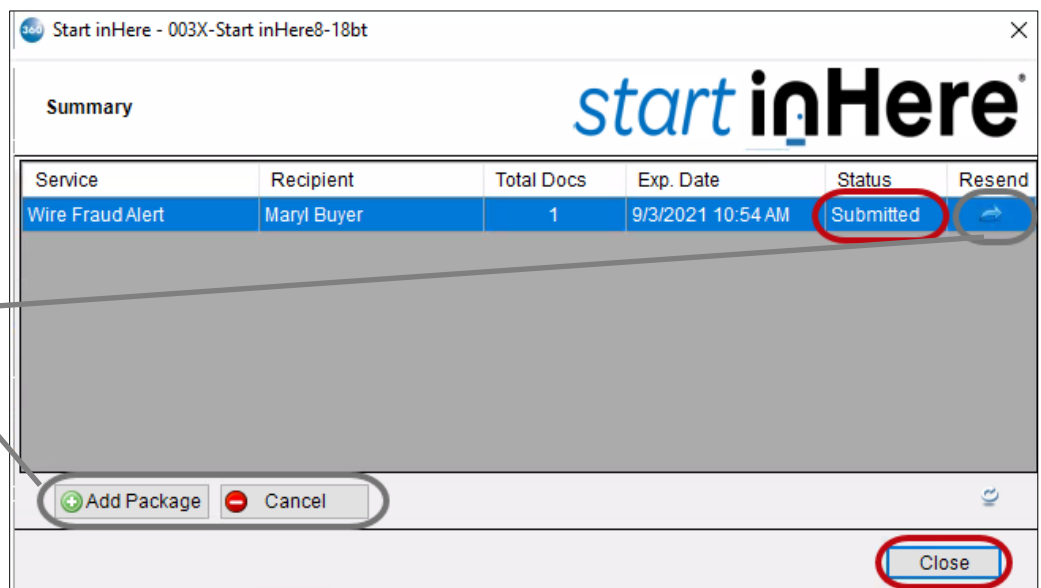
Once the package is sent, the **Summary** screen shows the package **Status = Submitted**.

From this screen you can,

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

If you are done,

2. Click the **Close** button



Processing an Automated Digital Opening Package

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

Queue									
<div> Next Step Views: Active Order Filter: All Providers </div>									
Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On	Completed On	Description	
Start inHere	DOP	In Progress	003X-Start inHere8-18bt	Default\T\CA\NOC\EPU - Training\Training Profile\yFT NOCAL Escrow Training	Susan Rivera-Stoll	8/27/2021 8:54 AM		Maryl Buyer	

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

Queue									
<div> Next Step Views: Active Order Filter: All Providers </div>									
Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On	Completed On	Description	
Start inHere	DOP	Ready	003X-Start inHere8-18bt	Default\T\CA\NOC\EPU - Training\Training Profile\yFT NOCAL Escrow Training	Susan Rivera-Stoll	8/27/2021 9:06 AM		Maryl Buyer	
Start inHere	DOP	Canceled	003X-Start inHere8-18bt	Default\T\CA\NOC\EPU - Training\Training Profile\yFT NOCAL Escrow Training	Susan Rivera-Stoll	8/27/2021 8:54 AM		Maryl Buyer	

The automation process automatically returns data and documents to SoftPro and smartview.

- › **Data** - all data imports into the corresponding fields in your SoftPro order or the **Notes** screen depending upon your operation's automation configuration; contact your management for the configuration setup
- › **Notes** - all information is written to the **Order Notes** screen as a single note
- › **Documents** – the **Signer Certificate** and **Signer Answers Document** are returned with every package and imported to the linked smartview order

Review - SSDEMO10

Groups

☒ Data
Add To ProForm Notes
Show: Differences

	Name	Current Value	New Value
<input checked="" type="checkbox"/>	Buyers1 People1 Middle Name		May
<input checked="" type="checkbox"/>	Buyers1 People1 MobilePhone	(657) 622-1678	(657)622-1678
<input checked="" type="checkbox"/>	Buyers1 People1 HomePhone	(657) 622-1678	(657)622-1678
<input checked="" type="checkbox"/>	Buyers1 People1 WorkPhone		(503)999-4545

Notes

<input checked="" type="checkbox"/>	Text
<input checked="" type="checkbox"/>	Maryl Buyer : DOB: 07/23/2003
<input checked="" type="checkbox"/>	SSN: 1212
<input checked="" type="checkbox"/>	Marital Status: Unmarried

Documents

	View	Copy	File Name	File Size(KB)	Transferred
<input checked="" type="checkbox"/>			BUYER WIRE_FRAUD form for Maryl Buyer.pdf	275426	100%
<input checked="" type="checkbox"/>			BUYER SIGNER_CERTIFICATE form for Maryl Buyer.pdf	16038	100%

smartView Folder: [98473593](#)

NOTE: As with all **360** products, you can create a customized view to track your transactions. For questions or assistance with the **360 Queue**, contact SoftPro Support at softprohelp@fnf.com.