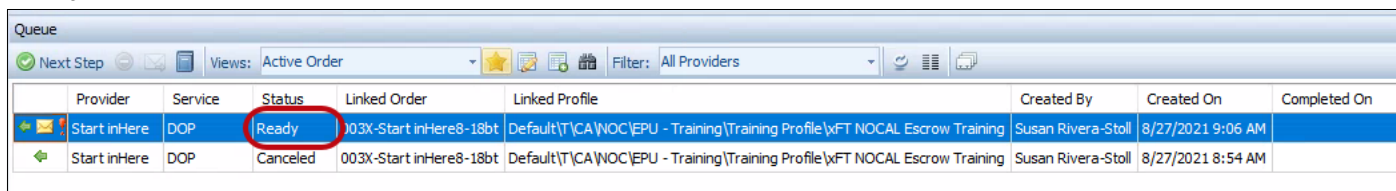


Importing Lender and Payoff Lender Contact Data from DOP

When importing Lender and Payoff Lender data into SoftPro, you have the option to overwrite or append the contact details.

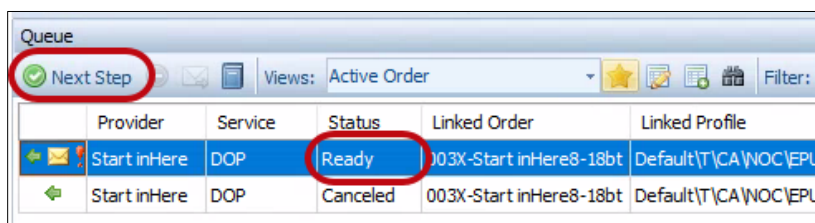
Follow these steps to accept a Digital Opening Package (DOP) and select the **Overwrite/Append Payoff/Lender** import checkbox as applicable.

Once the recipient completes the eSign process, Start inHere returns the data and documents and sets the **Status** to **Ready** in the **360 Queue**.



Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On	Completed On
Start inHere	DOP	Ready	003X-Start inHere8-18bt	Default\T\CA\WOC\EPU - Training\Training Profile\XFT NOCAL Escrow Training	Susan Rivera-Stoll	8/27/2021 9:06 AM	
Start inHere	DOP	Canceled	003X-Start inHere8-18bt	Default\T\CA\WOC\EPU - Training\Training Profile\XFT NOCAL Escrow Training	Susan Rivera-Stoll	8/27/2021 8:54 AM	

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



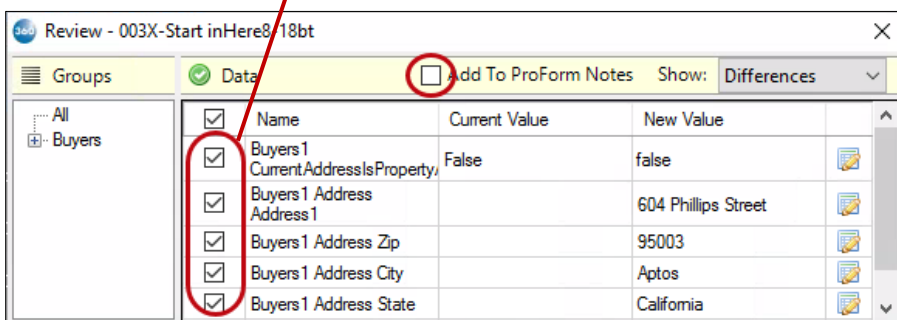
Provider	Service	Status	Linked Order	Linked Profile
Start inHere	DOP	Ready	003X-Start inHere8-18bt	Default\T\CA\WOC\EPU
Start inHere	DOP	Canceled	003X-Start inHere8-18bt	Default\T\CA\WOC\EPU

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

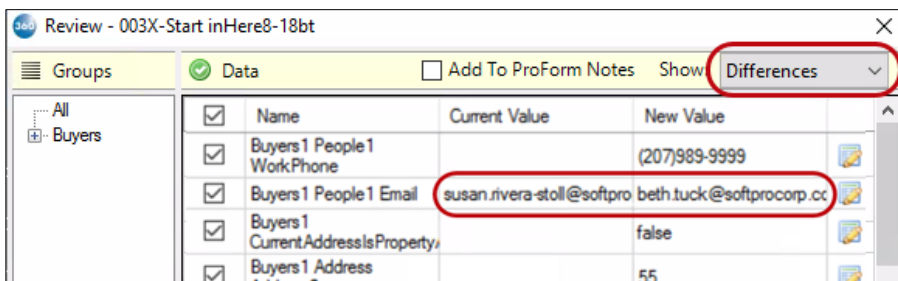


Groups		Data	Add To ProForm Notes	Show: Differences
All		<input checked="" type="checkbox"/>		
Buyers		<input checked="" type="checkbox"/>		
	Buyers1	<input checked="" type="checkbox"/>		
	CurrentAddressIsProperty	<input checked="" type="checkbox"/>		
	Buyers1 Address Address1	<input checked="" type="checkbox"/>		
	Buyers1 Address Zip	<input checked="" type="checkbox"/>		
	Buyers1 Address City	<input checked="" type="checkbox"/>		
	Buyers1 Address State	<input checked="" type="checkbox"/>		

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

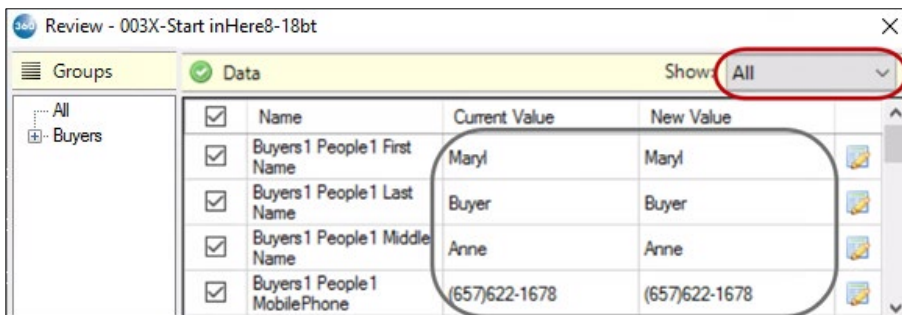
Importing Lender and Payoff Lender Contact Data from DOP

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



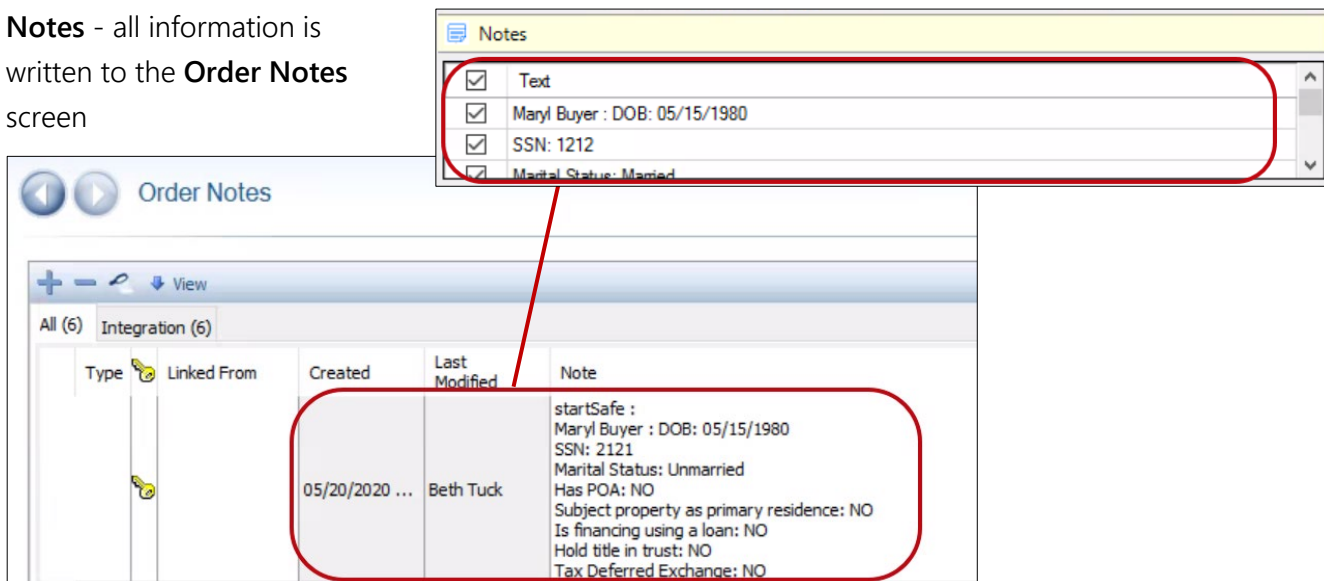
Groups	Data	Current Value	New Value
Buyers	<input checked="" type="checkbox"/> Name		
	<input checked="" type="checkbox"/> Buyers1 People1 Work:Phone		(207)989-9999
	<input checked="" type="checkbox"/> Buyers1 People1 Email	susan.rivera-stoll@softpro	beth.tuck@softprocorp.cc
	<input checked="" type="checkbox"/> Buyers1 CurrentAddressIsProperty		false
	<input checked="" type="checkbox"/> Buyers1 Address Address2		55

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



Groups	Data	Current Value	New Value
Buyers	<input checked="" type="checkbox"/> Name		
	<input checked="" type="checkbox"/> Buyers1 People1 First Name	Maryl	Maryl
	<input checked="" type="checkbox"/> Buyers1 People1 Last Name	Buyer	Buyer
	<input checked="" type="checkbox"/> Buyers1 People1 Middle Name	Anne	Anne
	<input checked="" type="checkbox"/> Buyers1 People1 MobilePhone	(657)622-1678	(657)622-1678

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



Notes

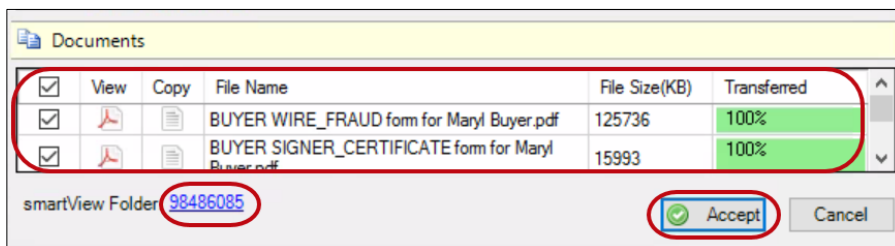
- ☒ Text
- ☒ Maryl Buyer : DOB: 05/15/1980
- ☒ SSN: 1212
- ☒ Marital Status: Married

Order Notes

Type	Linked From	Created	Last Modified	Note
		05/20/2020 ...	Beth Tuck	startSafe : Maryl Buyer : DOB: 05/15/1980 SSN: 2121 Marital Status: Unmarried Has POA: NO Subject property as primary residence: NO Is financing using a loan: NO Hold title in trust: NO Tax Deferred Exchange: NO

- » **Documents** - all documents import to the linked smartview order

- » Click the **Folder** link if you wish to select a specific folder in smartVIEW

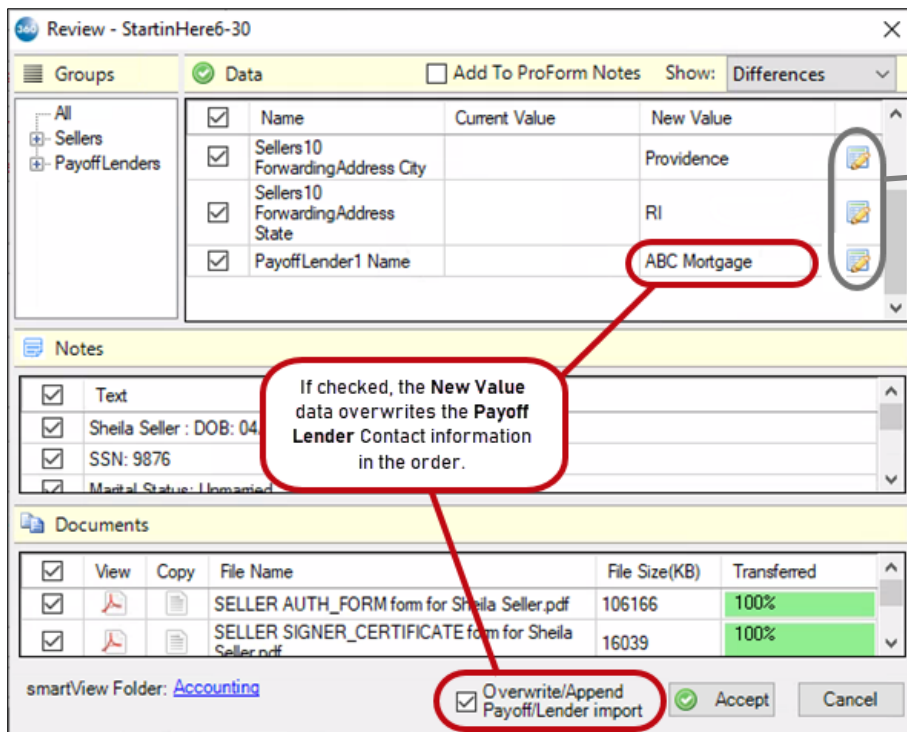


View	Copy	File Name	File Size(KB)	Transferred
<input checked="" type="checkbox"/>		BUYER WIRE_FRAUD form for Maryl Buyer.pdf	125736	100%
<input checked="" type="checkbox"/>		BUYER SIGNER_CERTIFICATE form for Maryl Buyer.pdf	15993	100%

smartView Folder [98486085](#) Accept Cancel

Importing Lender and Payoff Lender Contact Data from DOP

- › **Overwrite/Append Payoff/Lender import** check box- if the check box is,
 - » unchecked, Payoff Lender data is appended, adding an additional Payoff Lender contact
 - » checked, the existing Payoff Lender contact screen is overwritten with information in the **New Value** column



The screenshot shows the 'Review - StartinHere6-30' window. It has a 'Groups' sidebar on the left with 'All', 'Sellers', and 'Payoff Lenders'. The main area is divided into three sections: 'Data', 'Notes', and 'Documents'.

Data Section: A table with columns 'Name', 'Current Value', and 'New Value'. It contains three rows of data. The 'New Value' column has a red circle around the 'ABC Mortgage' value, with a callout box pointing to it that says 'If checked, the New Value data overwrites the Payoff Lender Contact information in the order.'

Notes Section: A list of notes with checkboxes. The first note is 'Text'.

Documents Section: A table with columns 'View', 'Copy', 'File Name', 'File Size(KB)', and 'Transferred'. It contains two rows of documents. The first row is 'SELLER AUTH_FORM form for Sheila Seller.pdf' with a file size of 106166 KB and a transfer status of 100%.

Footer: A 'smartView Folder: Accounting' link and a checkbox labeled 'Overwrite/Append Payoff/Lender import' which is checked. There are 'Accept' and 'Cancel' buttons.

REMINDER: If you need to edit values before importing into SoftPro, click the **Edit Value** icon for the value you wish to edit.

You can view the Signer's Answer Document in smartview if necessary.

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