

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**.

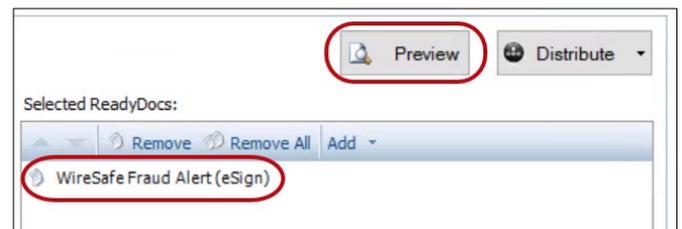
Follow these steps to create and distribute a DOP and include the Mobile Deposit step in the package to the buyers.

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.

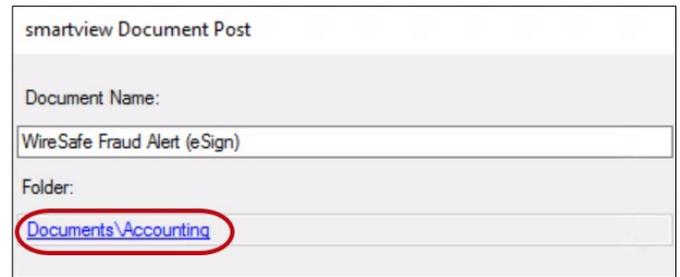
3. Click the **Documents** button
4. **Preview/Publish** the applicable document,
 - › **WireSafe Fraud Alert (eSign)** document (buyers)
 - › **Payoff Authorization (eSign)** documents (sellers or borrowers on a refinance)



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

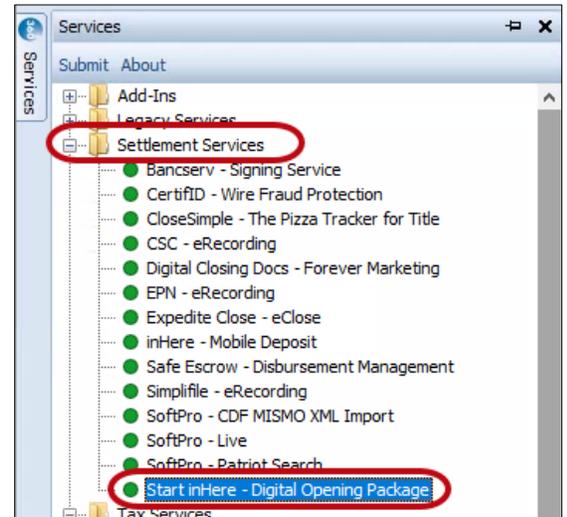


Creating the Start inHere Digital Opening Package

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

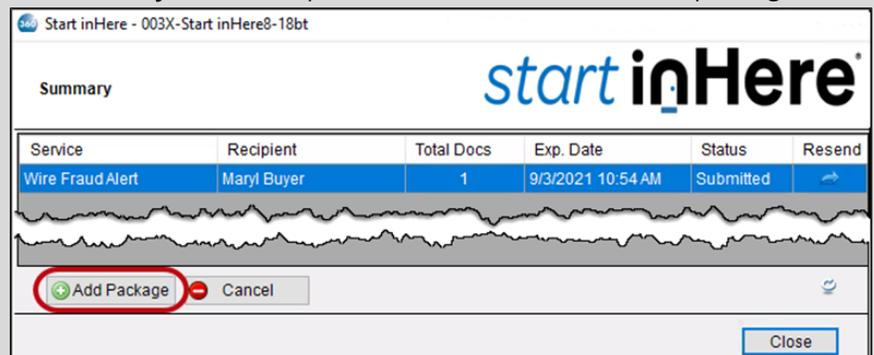


2. Expand the **Settlement Services** folder
3. Double-click the **Start inHere – Digital Opening Package** entry



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.

<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		

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.

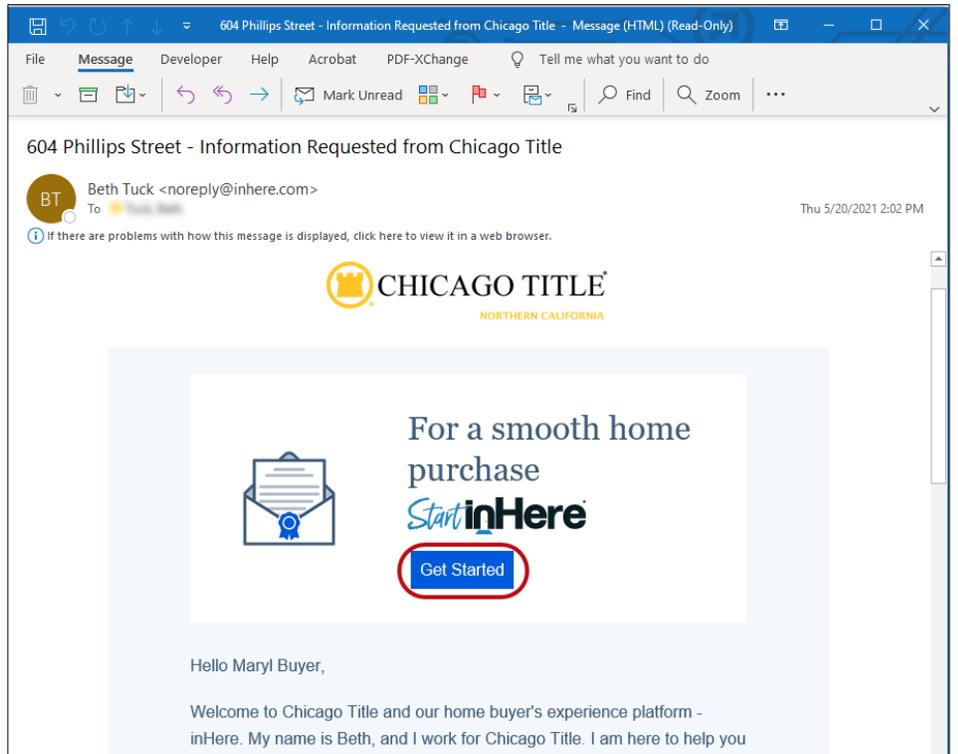
6. Click the **Submit** button

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

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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.



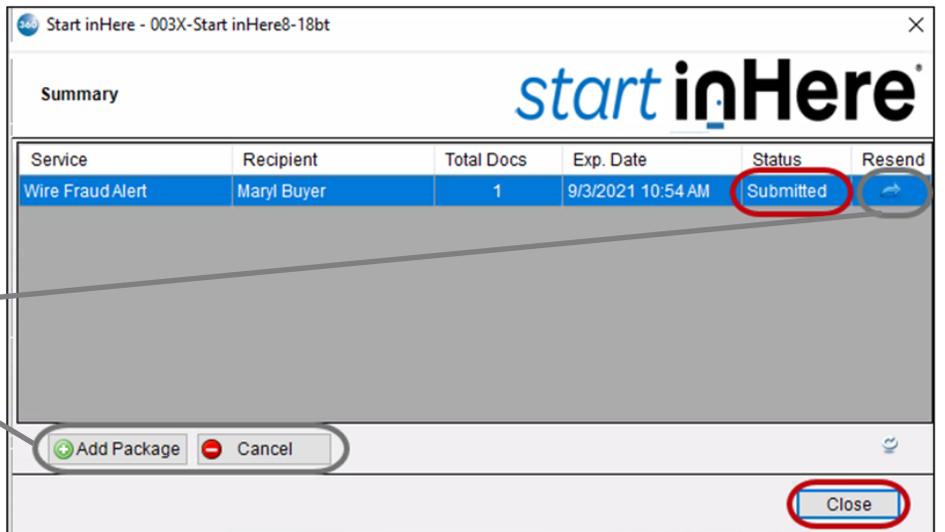
Once the package is sent, the **Summary** screen shows the package **Status = Submitted**.

From this screen you can,

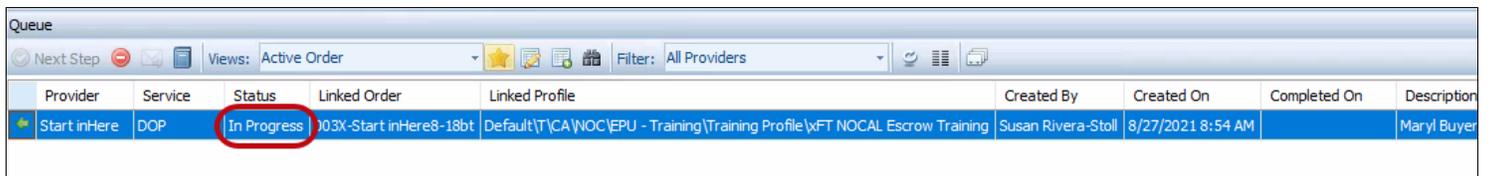
- > **Resend**
- > **Add Package**
- > **Cancel** a package

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**.

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\xFT 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\xFT NOCAL Escrow Training	Susan Rivera-Stoll	8/27/2021 8:54 AM		Maryl Buyer

8. Highlight the entry you wish to process
9. 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\NOC\EPU
Start inHere	DOP	Canceled	003X-Start inHere8-18bt	Default\T\CA\NOC\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:
All	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Differences
Buyers	<input checked="" type="checkbox"/>		

Name	Current Value	New Value
Buyers1 CurrentAddressProperty	False	false
Buyers1 Address Address1		604 Phillips Street
Buyers1 Address Zip		95003
Buyers1 Address City		Aptos
Buyers1 Address State		California

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

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

Groups	Data	Add To ProForm Notes	Show:
All	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Differences
Buyers	<input checked="" type="checkbox"/>		

Name	Current Value	New Value
Buyers1 People1 WorkPhone		(207)989-9999
Buyers1 People1 Email	susan.rivera-stoll@softpro	beth.tuck@softprocorp.cc
Buyers1 CurrentAddressProperty		false
Buyers1 Address Address1		55

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

Name	Current Value	New Value
Buyers1 People1 First Name	Maryl	Maryl
Buyers1 People1 Last Name	Buyer	Buyer
Buyers1 People1 Middle Name	Anne	Anne
Buyers1 People1 MobilePhone	(657)622-1678	(657)622-1678

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

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

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 fom for Maryl Buyer.pdf	125736	100%
<input checked="" type="checkbox"/>		BUYER SIGNER_CERTIFICATE fom for Maryl Buyer.pdf	15993	100%

smartView Folder: **98486085**

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