

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\NOC\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\NOC\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\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:	Differences
All	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Buyers	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
	<input checked="" type="checkbox"/>	<input type="checkbox"/>		

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

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

Name	Current Value	New Value
Buyers 1 People1 Work:Phone		(207)989-9999
Buyers 1 People1 Email	susan.rivera-stoll@softpro	beth.tuck@softprocorp.cc
Buyers 1 CurrentAddressIsProperty		false
Buyers 1 Address		55

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

Name	Current Value	New Value
Buyers 1 People1 First Name	Maryl	Maryl
Buyers 1 People1 Last Name	Buyer	Buyer
Buyers 1 People1 Middle Name	Anne	Anne
Buyers 1 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

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](#)

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- > **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 a 'Review - StartinHere6-30' window with the following sections:

- Data Table:**

	Name	Current Value	New Value
<input checked="" type="checkbox"/>	Sellers10 ForwardingAddress City		Providence
<input checked="" type="checkbox"/>	Sellers10 ForwardingAddress State		RI
<input checked="" type="checkbox"/>	PayoffLender1 Name		ABC Mortgage
- Notes:**
 - Text
 - Sheila Seller : DOB: 04
 - SSN: 9876
 - Marital Status: Unmarried
- Documents:**

	View	Copy	File Name	File Size(KB)	Transferred
<input checked="" type="checkbox"/>			SELLER AUTH_FORM form for Sheila Seller.pdf	106166	100%
<input checked="" type="checkbox"/>			SELLER SIGNER_CERTIFICATE form for Sheila Seller.pdf	16039	100%
- Footer:**

smartView Folder: [Accounting](#)

Overwrite/Append Payoff/Lender import

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