



SOFTPRO™

360

## Impact SoftPro 360 – Administration Guide

The Impact SoftPro 360 widget is a portal through which several services are available that can streamline your workflow in Impact's Escrow and Title modules. SoftPro 360 functionality was introduced with Impact/SQL version 8.5 (037).

This **Administration Guide** will detail the administrative functions that are associated with the Impact SoftPro 360 widget, in the Impact Utilities module. The administration is of the services offered and of users and their operating environment. Groups of users can share permissions, views and services, as will be described herein.

Separate documentation exists to introduce the Impact SoftPro 360 widget in general, and for specific product offerings through SoftPro 360. Reviewing that documentation is recommended, before endeavoring to administer the functionality – as an understanding of the user experience would be helpful for an administrator.

### INITIAL INSTALLATION

In the Impact Utilities module, under the **Tools** menu, there is a **SoftPro 360** entry. Under that menu entry, there is, prior to the initial installation of SoftPro 360, one sub-entry: **Install SoftPro 360**

To enable the use of SoftPro 360, the **Install SoftPro 360** option must be selected. Once initiated, the system will use the Impact Licensing Service to pull a bit of information from USA DSI's systems, and then the Impact SoftPro 360 widget will be available for configuration. Once completed, the **Install SoftPro 360** menu option will be removed from the SoftPro 360 menu, and will be replaced by two sub-entries: **Administration** and **Mappings**.

The following pages will describe those two functions.

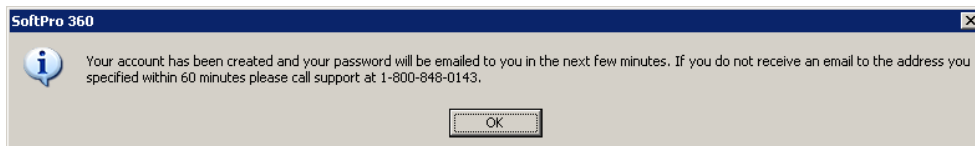
## LOGGING IN

Clicking on the **Administration** sub-menu option will present the user with an **Initializing SoftPro 360** progress window, and then the user will be prompted to log into SoftPro 360. The **SoftPro 360 Login** screen below will be presented.

The image shows the 'SoftPro 360 Login' window. It features the 'SOFTPRO 360' logo at the top. Below the logo are input fields for 'Email Address' and 'Password'. To the right of these fields is a 'Learn More' button. Below the 'Password' field is a red rectangular box containing the text 'Register New Account'. Below this box are two links: 'Change Password' and 'Forgot Password?'. At the bottom left is a checkbox labeled 'Remember Credentials'. At the bottom center are 'Login' and 'Cancel' buttons.

The first time a user connects, they will need to create a SoftPro 360 account, by clicking on the [Register New Account](#) link.

The **Welcome to SoftPro 360 Registration** screen will be presented and the user should enter their full name and email address; and, re-enter their email address exactly as entered the first time (precisely the same case, both times). The **Register** button should then be clicked on. If the registration is successful, a message like that shown below will be presented and an email will be sent to the user with a temporary password that should be used on the SoftPro 360 Login screen.

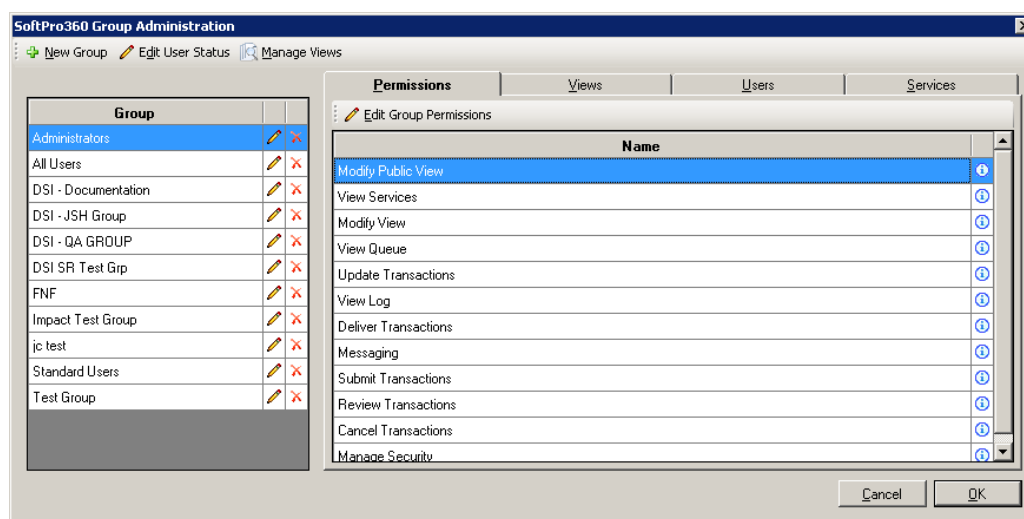
The image shows the 'Welcome to SoftPro 360 Registration' window. It displays 'Customer #: 410060'. Below this are three input fields: 'Full Name' (containing 'Joseph Westrick'), 'Enter Email' (containing 'jwestrick@digisolaz.com'), and 'Validate Email' (containing 'jwestrick@digisolaz.com'). At the bottom right are 'Register' and 'Cancel' buttons.The image shows a 'SoftPro 360' information dialog box. It contains an information icon and the text: 'Your account has been created and your password will be emailed to you in the next few minutes. If you do not receive an email to the address you specified within 60 minutes please call support at 1-800-848-0143.' At the bottom center is an 'OK' button.

The first time the user connects with his/her temporary password, a message will be presented indicating the password must be reset and, upon clicking OK, the user will be presented with a screen on which they can enter their new password. A confirmation of the password change will then be presented.

On subsequent logins, the user should simply enter their Email Address and previously established Password into the login screen.

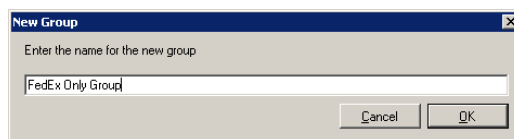
## ADMINISTRATION

The **SoftPro 360 Group Administration** screen will be presented, after the user logs in, as shown below. There are icons across the top of the screen (which will be described below) and the main screen is divided into two sections: on the left, a listing of **Groups** that have been established; and, on the right a set of four tabs that deal with administration of group **Permissions**, **Views**, **Users** and **Services**. Clicking on each tab heading will present the information on each, for the highlighted **Group** on the left.




This sample screen has more groups than would be typical, as it was captured from a “test” system. At the time of initial setup, only the **All Users** group will be presented on the left-hand window, under the **Group** heading. All users will be members of the **All Users** group.

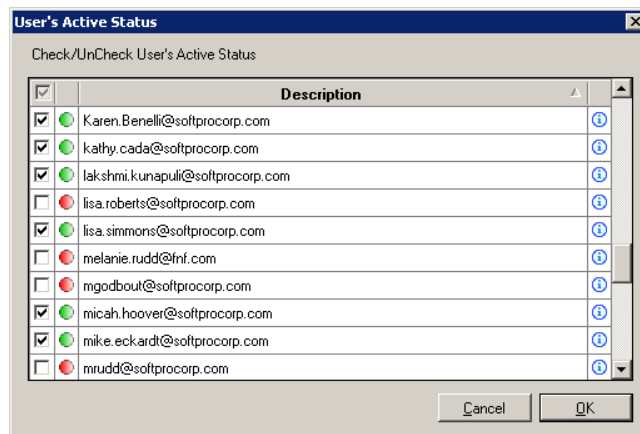
The **+ New Group** icon, at the top of the screen, is used to create a new group. This would be done if there is a sub-set of All Users to whom you wish to give more or less permissions, alternate views or a different set of services. When a new group is requested, a window will present, asking for the new group’s name. Provide the name and click **OK**, and the group will be added to the listing. There will be no entries on the **Permissions**, **Views**, **Users** and **Services** tabs of the new group. The appropriate editing for the group is done on those tabs, as discussed below. In the sample below, a new group is being established for users that should only have access to the FedEx service.



An **Administrators** group is not defaulted and one should be created to identify those persons who have full administrative permissions over the SoftPro 360 environment for the specific Impact/SQL database.

Within the **Group** window, to the right of each group name, there are icons that can be used to **Rename** a group, and to **Delete** a group.



The  **Edit User Status** icon, at the top of the SoftPro 360 Group Administration screen, is used to alter a self-registered user's status, from active to inactive or vice-versa. All users self-register through the SoftPro 360 Widget with a unique email address for each database – users that access SoftPro 360 from multiple databases must get alias email addresses for each database, from their IT contact. The administrator can deactivate a user, if that need arises, with this function. When selected, the User's Active Status screen is presented, as shown below.




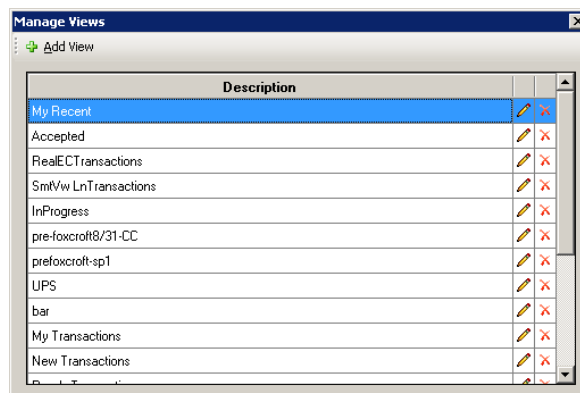
The listing can be sorted in ascending or descending order by clicking on the **Description** header bar (alternates the sort with each click).

The checkbox in front of each email address is used to alter a user's status. Checked is Active, unchecked is Inactive. The green and red status indicator (green = active, red = inactive) will not change until the change is saved, by clicking on OK to close the window.

The ⓘ Info icon, to the right of each user's email address will bring up a window with information on the user.

The  **Manage Views** icon, at the top of the SoftPro 360 Group Administration screen, is used to create or edit "views". A view is a filtering mechanism that lets the user, in the SoftPro 360 widget, see a subset of their activity with a particular service, based on "rules" that are detailed in the **View Builder** screens, accessed via  **Manage Views**. When clicked upon, the **Manage Views** window will present, as shown here. (Again, this sample screen is a bit cluttered with test entries that are not representative of a production site.) A **View** must exist before it can be added to a **Group**.

The  **Edit** icon is used to open the **View Builder** screen, on which the view filtering definitions are entered.



The **View Builder** screen, shown here, has a field for the view's **Name**, and the body of the screen is used to enter the filtering definition instructions.

The query fields available are:

- Category
- CompletedOn
- CreatedBy
- CreatedOn
- Description
- LinkedOrder
- LinkedProfile
- OrganizationNumber
- Service
- ProviderReferenceNumber
- SentTo
- Status
- TransactionNumber
- Provider

The > (greater than), < (less than), and == (equals) characters can be used in the query strings.

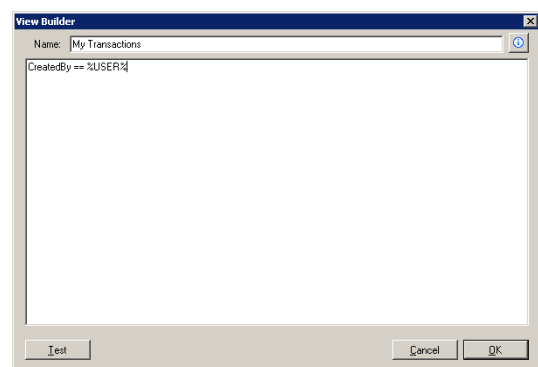
Apostrophes (') are used around strings that might contain a space.

The following 'tokens' or variables can be used on the right side of a query:

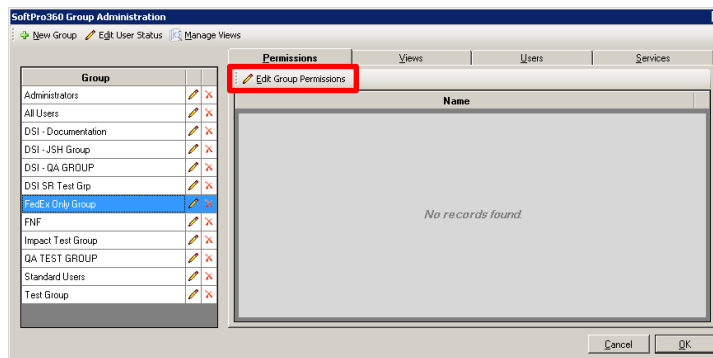
- %USER% - current user (wrap in apostrophes to be safe if the return contains a space)
- %ACTIVEORDER% - current active order
- %DATE(#Days)% - Today's date +/- the # of days
- %MONTH(#Days)% - Current start of the month +/- # of days
- %YEAR(#Days)% - Current start of the year +/- # of days


DSI Support should be consulted when creating Views, if guidance is needed.

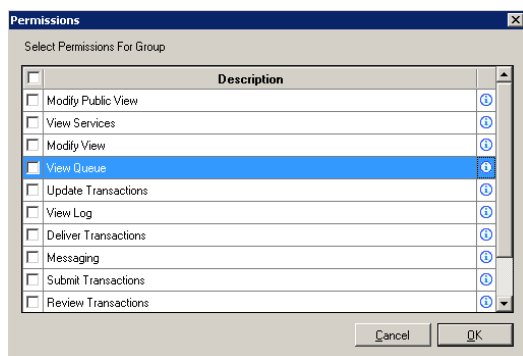
The **Test** button, in the lower left of the screen, is used to confirm that the definition statement returns data properly from the system. A successful test result should be received before the **OK** button is clicked to save the **View**. The **Cancel** button will close the **View Builder** screen without saving any changes that might have been made.




The following discussion will explain the editing of group **Permissions**, **Views**, **Users** and **Services**. The discussion will work with the sample “FedEx Users Only” group, created above, which, at creation had nothing on the four tabs of the **SoftPro 360 Group Administration** screen, when highlighted on the **Group** listing. The same functionality is used on existing group entries to modify any of the tabs’ data.

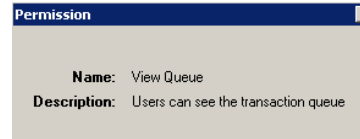


Clicking on the  **Edit Group Permissions** icon, at the top of the **Permissions** tab, will open the **Permissions** window, on which you will select the permissions for the selected group.



The  **Info** icon, to the right of each permission **Description** will provide a brief explanation of the permission’s function.

For example, clicking on the Info icon for the **View Queue** permission, presents



the message shown here. A full listing is shown on the


next page.

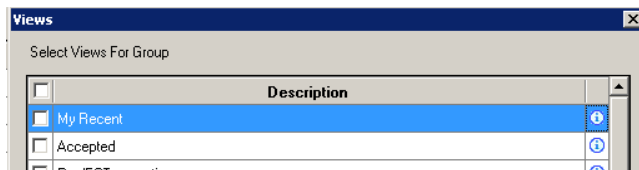
The full current list of **Permissions** is:

- **Modify Public View** – Users can edit public views available to all users (Also requires **Modify View** permission); *generally reserved for Admin users.*
- **View Services** – Users can see the list of available services.
- **Modify View** – Users can edit personal views.
- **View Queue** – Users can see the transaction queue.
- **Update Transactions** – Users can update transactions (Not supported by all services).
- **View Log** – Users can access transaction logs to see associated events and messages.
- **Deliver Transactions** – Users can deliver transactions to providers (Not supported by all services).
- **Messaging** – Users can communicate with providers by receiving and sending messages (Not supported by all services).
- **Submit Transactions** – Users can order services from providers.
- **Review Transactions** – Users can review documents and data sent by the provider for acceptance into ProForm (meaning Impact/SQL in this integration).
- **Cancel Transactions** – Users can cancel transactions (Not supported by all services).
- **Manage Security** – Allows users to set permissions, assign views, select available services, and manage users; *generally reserved for Admin users.*


In the sample of preparing the “FedEx Only Group” for use, the finished Group Permissions might be as shown below.

Permissions	Views	Users	Services
Edit Group Permissions			
Name			
Modify View			
View Queue			
Update Transactions			
View Log			
Deliver Transactions			
Messaging			
Submit Transactions			
Review Transactions			
Cancel Transactions			

The  **Edit Group Views** icon, at the top of the **Views** tab, will open the **Views** window, on which you will select the views (from the established set) for the selected group. The **Views** window is similar in format to the **Permissions** window, with all existing views listed and a checkbox in front of each, which is used to assign the view to the selected group.




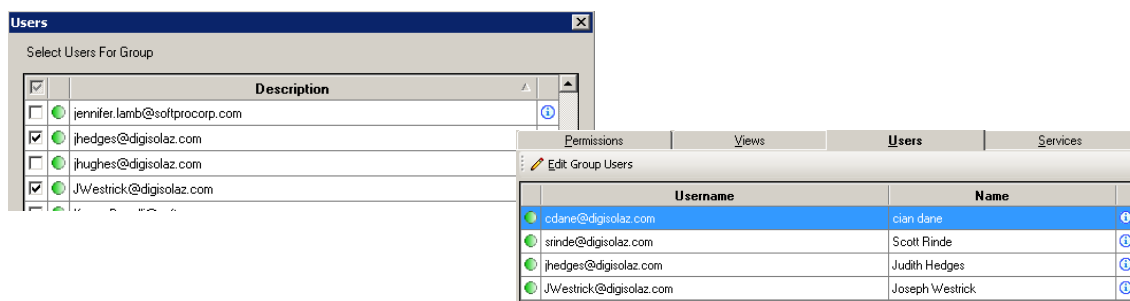
As was described above, the **Manage Views** function is used to establish views before they can be assigned to specific groups. Existing default views are likely to be sufficient in most cases.

The  **Info** icon, on the right of each view description, will bring up a window of information about the view: the **Name**, who it was **Created By** and the date it was **Created On**.



In the sample of preparing the “FedEx Only Group” for use, the finished Group Views might be as shown below.

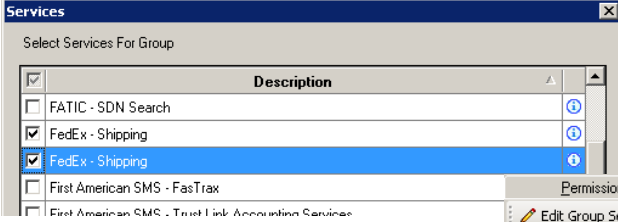
Permissions	Views	Users	Services
Edit Group Views			
Name		Created By	Created On
InProgress		sailaja.nagineni@softprocorp.com	05/07/2010 12:52 PM
My Transactions		andrew.mudgett@softprocorp.com	04/21/2010 6:02 PM
Ready Transactions		andrew.mudgett@softprocorp.com	04/21/2010 6:02 PM

The  **Edit Group Users** icon, at the top of the **Users** tab, will open the **Users** window, on which you will select the users (from the current self-registered listing) for the selected group. The **Users** window is similar in format to the **Permissions & Views** windows, with all existing users listed and a checkbox in front of each, which is used to assign the user to the selected group. Clicking on the **Description** header will sort the listing of email addresses alphabetically, in ascending or descending order (depending on the number of times it is clicked on). Below are the **Users** selection screen and the resulting **Users** tab, after it has been populated for the sample “FedEx Only Group”.



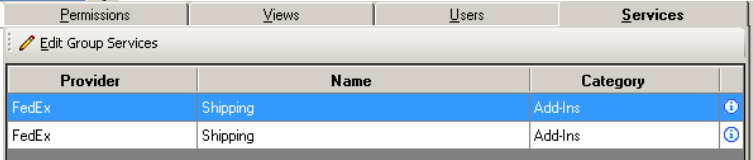


The  **Edit Group Services** icon, at the top of the **Services** tab, will open the **Services** window, on which you will select the services available to the selected group. The **Services** window is similar in format to the **Permissions**, **Views** and **Users** windows, with all services listed and a checkbox in front of each, which is used to assign the service(s) to the selected group. Clicking on the **Description** header will sort the listing of services alphabetically, in ascending or descending order (depending on the number of times it is clicked on). The  **Info** icon, next to each service name, may provide some information on the service – not all services have additional information. Below are the **Services** selection screen and the resulting **Services** tab, after it has been populated for the sample “FedEx Only Group”.



The screenshot shows a window titled 'Services' with a sub-header 'Select Services For Group'. It contains a table with a 'Description' column and a checkbox column. The services listed are: FATIC - SDN Search, FedEx - Shipping (checked), FedEx - Shipping (checked), First American SMS - FasTrax, and First American SMS - Trust Link Accounting Services. Each service has an info icon to its right.

Note: there are a few services that have two entries for them...and both should be selected to properly add the service to the group. FedEx is one of these.



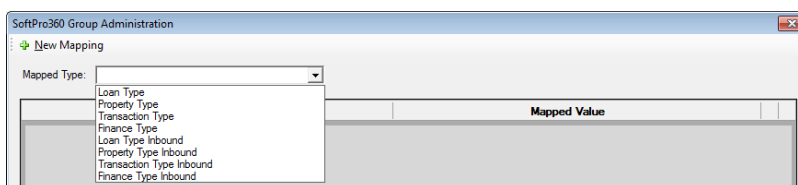
The screenshot shows the 'Services' tab in the application interface. It has a sub-header 'Edit Group Services' and a table with three columns: 'Provider', 'Name', and 'Category'. There are two entries for FedEx, both with 'Shipping' as the name and 'Add-Ins' as the category. Each entry has an info icon to its right.

Provider	Name	Category
FedEx	Shipping	Add-Ins
FedEx	Shipping	Add-Ins

Once all editing of Permissions, Views, Users and Services is completed, the user must click on OK, on the SoftPro 360 Group Administration screen to save the changes/selections that have been made.

## MAPPINGS

The **SoftPro 360 Mappings** function, on the SoftPro 360 sub-menu, is used to map the Impact/SQL **Loan Types**, **Property Types**, **Transaction Types** and **Finance Types** to the values that SoftPro 360 uses to tie to codes in the various services that utilize them. There are two sets of mappings for each of the four code sets...“inbound” and “outbound”. In the **Mapped Type** dropdown (where the user selects the code set to be mapped) those entries with just the code type name are for the “outbound” mappings, and those with the word “inbound” after the name are for “inbound” mappings. Some services don’t utilize any mappings; some use a limited amount of this information. Only those mappings needed by the services being used by a business need be established.



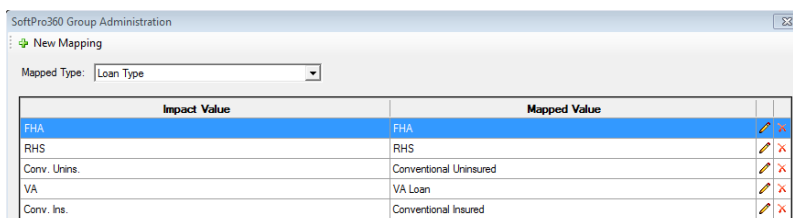
The “outbound” set can map each Impact/SQL code to a SoftPro 360 value. Once each Impact/SQL code has a mapping, the effort is complete. It may be that several Impact/SQL codes map to the same SoftPro 360 code.

The “inbound” set can map one or more SoftPro 360 values to each Impact/SQL code, so there may be several entries for some of the Impact/SQL codes. In addition, in some instances, where there may only be a limited set of SoftPro 360 values for a code (such as Property Type), the widget will use an additional data field, from the service, to expand on the value represented by a SoftPro 360 “Other” description.

Once the basic SoftPro 360 widget configuration is done, when services requiring or providing these codes are to be utilized by a site, it may be that some file data may appear to be incomplete when exported or imported – and this would imply that additional mapping entries might need to be made. It may well be that incomplete mapping is satisfactory. Consult with DSI on any confusion on this matter.

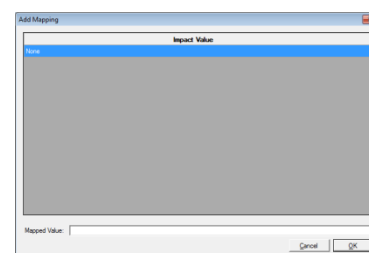
## Loan Type (outbound) & Loan Type Inbound

The **Loan Type (outbound)** and **Loan Type Inbound** mapping screens are the most straight-forward, as the Loan Type list is static in Impact/SQL. That means that the mappings are common to all Impact/SQL databases. The mapping presents two columns, **Impact Value** and **Mapped Value**. These can be mapped as shown below.



Impact Value	Mapped Value
FHA	FHA
RHS	RHS
Conv. Unins.	Conventional Uninsured
VA	VA Loan
Conv. Ins.	Conventional Insured

To initiate mapping of a value that is in Impact, but not yet on the screen for the selected **Mapped Type**, click on the **+ New Mapping** icon, at the top of the **Mapping** screen. As each code is selected, from the **Add Mapping** screen, the user will type the SoftPro 360 value to map to the Impact/SQL code in the field at the bottom of the screen, and then click **OK** to save the mapping. Repeat until all Impact/SQL codes have been mapped.



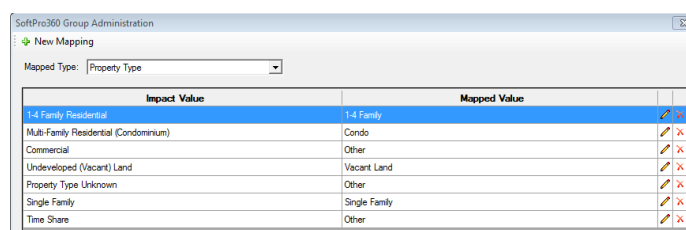
## Property Type (outbound)

The **Property Type** mappings are not as straight-forward as the Loan Type mappings, as each site's property type listing is unique. The set of SoftPro 360 values is, at this writing, as follows: **Single Family, Condo, Vacant Land, Cooperative, 1-4 Family** and **Other**.

To add an entry to the **Property Type (outbound)** mappings list, click on the **+ New Mapping** icon, at the top of the **Mapping** screen, and a screen of as-yet-unmapped Impact/SQL **Property Types** will be presented, along with a field into which the SoftPro 360 value is to be typed. **OK** is clicked on to save the entry.

Editing an existing mapping, with the **✎ Modify** icon, will bring up a screen on which the mapped value can be edited.

A representative **Property Type (outbound)** mapping listing is shown below.



Impact Value	Mapped Value
1-4 Family Residential	1-4 Family
Multi-Family Residential (Condominium)	Condo
Commercial	Other
Undeveloped (Vacant) Land	Vacant Land
Property Type Unknown	Other
Single Family	Single Family
Time Share	Other

## Property Type Inbound

The **Property Type Inbound** mappings have another wrinkle to them, in that the Impact/SQL SoftPro 360 widget makes an effort to expand on the property types being proffered by SoftPro 360 to provide for more mapping opportunities than would be available otherwise – at least for the RealEC service. If the SoftPro 360 inbound property type is “Other” (SoftPro 360 maps several RealEC property types to “Other”), the Impact/SQL SoftPro 360 widget will look to another field ({Other Descr}) for the inbound value and so the available inbound values are more numerous than the standard SoftPro 360 values. The following list of RealEC property types are all mapped as “Other” by SoftPro 360, but can be mapped to Impact/SQL property types. These are in addition to the **Single Family, Condo, Vacant Land, Cooperative, 1-4 Family** and **Other** values.

**Apartment**

**Manufactured Home**

**Townhouse**

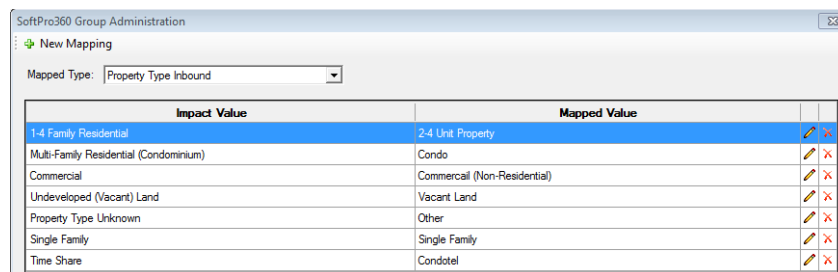
**2-4 Unit Property**

**Commercial (Non-Residential)**

**Farm**

**Condotel**

**Boatslip**

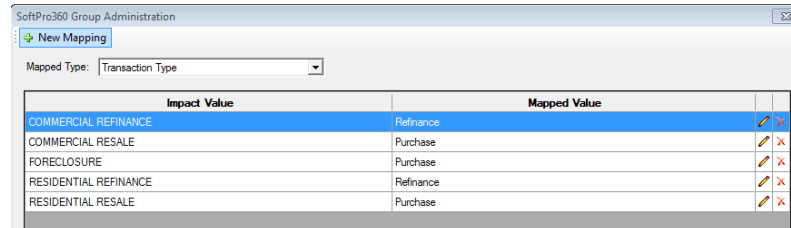


Impact Value	Mapped Value		
1-4 Family Residential	2-4 Unit Property		
Multi-Family Residential (Condominium)	Condo		
Commercial	Commercial (Non-Residential)		
Undeveloped (Vacant) Land	Vacant Land		
Property Type Unknown	Other		
Single Family	Single Family		
Time Share	Condotel		

## Transaction Type (outbound)

The **Transaction Type (outbound)** mappings are made to a limited set of SoftPro 360 values, which are, at this writing, **Refinance**, **Purchase** and **Other**.

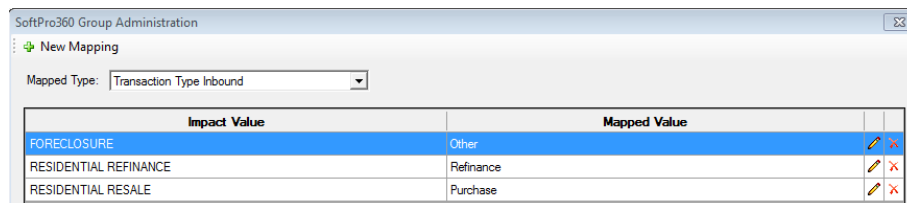
In this sample, there are multiple Impact/SQL values mapped to the SoftPro 360 Refinance and Purchase values.



Impact Value	Mapped Value
COMMERCIAL REFINANCE	Refinance
COMMERCIAL RESALE	Purchase
FORECLOSURE	Purchase
RESIDENTIAL REFINANCE	Refinance
RESIDENTIAL RESALE	Purchase

## Transaction Type Inbound

On inbound transactions, as there are only three SoftPro 360 values at this writing (**Refinance**, **Purchase** and **Other**), the **Transaction Type Inbound** mappings would be to the *most likely* Impact/SQL values intended by the SoftPrp 360 value – as there will be, in most cases, more Impact/SQL values than SoftPrp 360 values. Each SoftPrp 360 value should only be used once in the mappings as the system will use the first one found when doing the lookup.



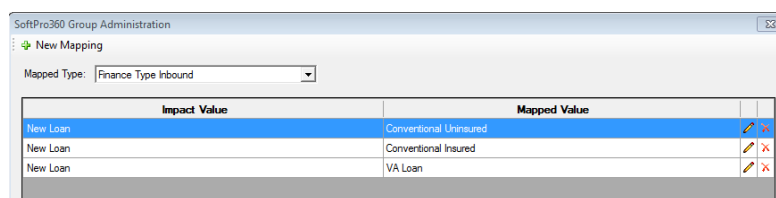
Impact Value	Mapped Value
FORECLOSURE	Other
RESIDENTIAL REFINANCE	Refinance
RESIDENTIAL RESALE	Purchase

## Finance Type (outbound)

The Finance Type (outbound) mappings have no use at this writing, but work in the same manner as the other outbound mappings: each Impact/SQL Finance Type can be mapped to a SoftPro 360 value (if and when SoftPro 360 expects to receive codes related to the Impact/SQL Finance Types– which no services do at this writing).

## Finance Type Inbound

The **Finance Type Inbound** mapping screen is used to fine-tune the mapping done by the **Loan Type** screen. SoftPro 360 does NOT return a Finance Type, but if the business wishes to have the system select a Finance Type, in Impact, based on the Loan Type returned by SoftPro 360, this mapping screen is used for that purpose. Like the Transaction Type Inbound mappings, if an entry can be made that will be right most of the time, it may make sense to set it up. Again, users must be clear that they should review the mappings made on a new file (from a service that opens orders) and determine if a more appropriate Impact value should be selected, within Impact, for the particular file.



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