



Brings you

SOFTPRO™

360

USA Digital Solutions, Inc. is pleased to introduce SoftPro 360 to our Impact/SQL clients. SoftPro 360 is a portal through which several services are available that can streamline your workflow in Escrow and Title. While there are many services that SoftPro 360 can offer, the current offerings through Impact/SQL are RealEC, Simplifile™, UPS™, FedEx™, Caylx, GPS, Encompass, AgentTRAX and SoftPro Appointments. USA Digital Solutions, Inc. will be adding more SoftPro 360 services as the Impact versions of the integrations with them are completed.

Clients will establish accounts with those service providers that they wish to utilize through SoftPro 360 (you may already have accounts set up) and then will access the service through the SoftPro 360 widget on the Impact Escrow &/or Title desktops, once the module has been installed. NOTE: A client need not utilize all of the services available. They will contract with the various vendors for only those services they wish to utilize.


A demonstration of SoftPro 360 can be provided, please contact USA Digital Solutions, Inc. to arrange for a demonstration.

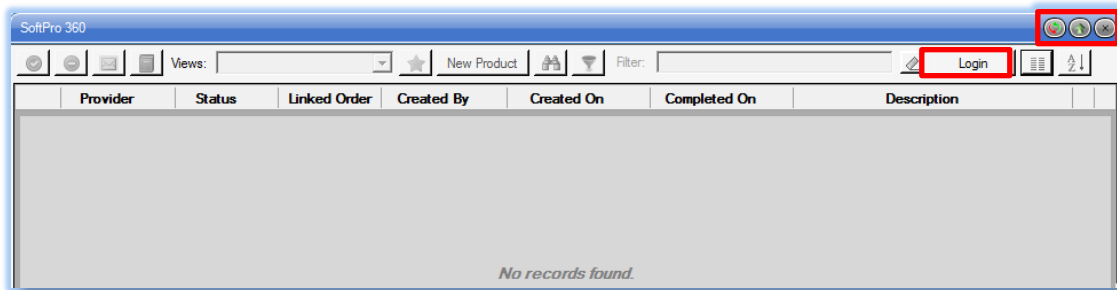
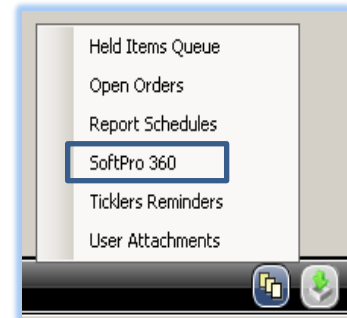
Clients should contact USA Digital Solutions, Inc. to have the Impact to SoftPro 360 module installed on their system.




There is no cost to the client for the use of the SoftPro 360 module itself. There may be vendors' fees for the services rendered. Some of the services available in the future may carry a transaction cost in addition to the vendors' fees.

The following guidelines explain the mechanics of the SoftPro 360 widget, utilized in the Impact/SQL Escrow and Title modules, to access the various services. There is separate documentation that details the user experience within each service module. This documentation can be reached at [usadsi.com](http://usadsi.com).

## GETTING STARTED

Users will find the SoftPro 360 widget on the Escrow widget menu, after clicking on the  **Widget** icon in the lower right corner of the Escrow desktop. The same icon will open the widget menu in Title, where the user can also select the SoftPro 360 entry. Upon selection, the Softpro 360 widget will open on the user's Impact/SQL desktop, as shown below.



Users of Escrow and Title widgets will be familiar with the three icons in the upper right corner of each:  **Refresh**,  **Collapse/Expand** and  **Close**.

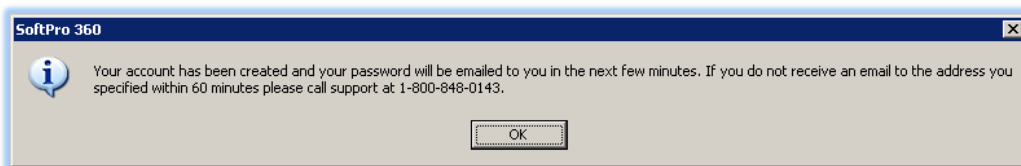


The **Login** button is used to connect the user to SoftPro 360 the first time. Clicking the **Login** button will present the **Sign In** screen. The first time a user connects, they will need to create a SoftPro 360 account, by clicking on the [Register New Account](#) link.



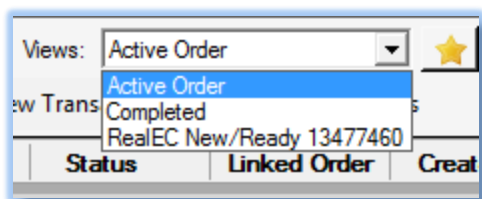
The **Welcome to SoftPro 360 Registration** screen will be presented and the user should enter their first and last name and email address; then, re-enter their email address exactly as entered the first time. The **Register** button should then be clicked on.

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 then be used on the SoftPro 360 **Sign In** screen.



The first time the user connects with their 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. After logging in with the new password, the user should not need to log in again unless there is an error. Subsequent logins will be done automatically after the widget opens and the **Login** button will change to **Logoff** after the auto-login.


## GENERAL SOFTPRO 360 WIDGET INFORMATION

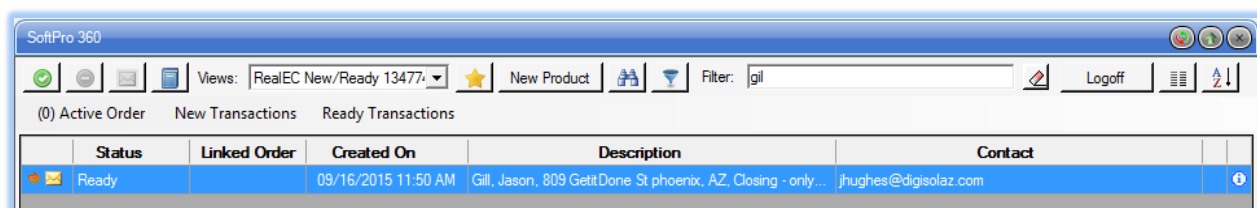


Work is accomplished in the 360 widget via **Views** that are available to the user. Most users, after 360 registration, will have a single default **Active Order View**. This view displays the transactions linked or related to the file open on the Impact/SQL desktop. Typically however, other **Views** would be added to your system, for example, the **RealEC**

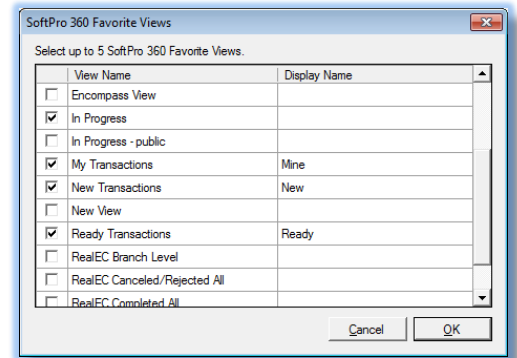
**New/Ready View**. The dropdown to the right of the **Views** field, when clicked on, will present the options available to the user. The different **Views** present sets of transactions based on guidelines established for the **View**.

**NOTE: The user will need to contact DIS Support in order to be assigned additional views.**

The **View** selected can be filtered, with the **Filter** field, by entering the beginning of values that would appear in either the **Provider**, **Status**, **Linked Order**, **Created By** or **Description** fields. At least three (3) characters must be entered for the filtering to begin to be applied. In the sample below, "gil" was entered in the **Filter** field to find items with a name beginning with "gil", and one entry was found (in the testing system). The  **Clear Filter** icon will clear the contents of the **Filter** field.





The ★ **SoftPro 360 Favorite Views** icon is used to select up to five (5) views that the user uses frequently, and to give them an alternate **Display Name**, if so desired. The screen presented is shown here (the user's views may not match the ones shown here – they will be the views available to the user). Check up to five (5) views, and enter an alternate **Display Name**, if desired, and click on **OK** to save.




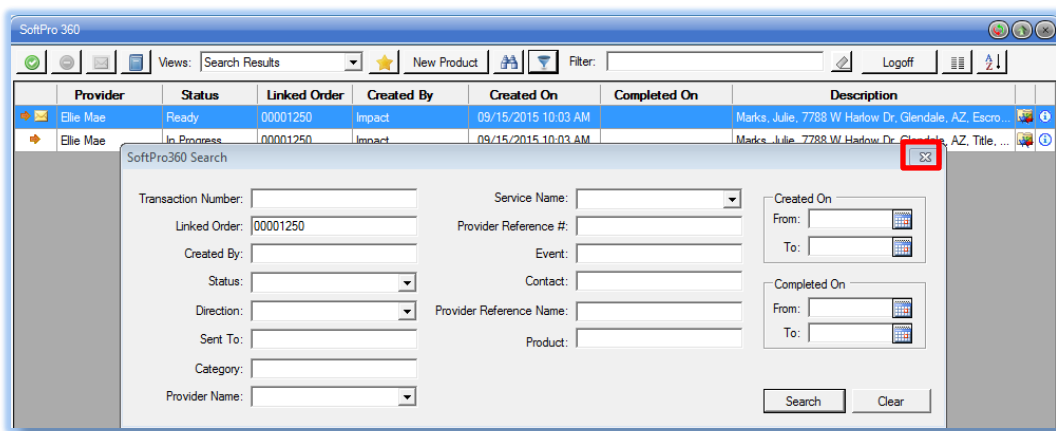
Once set, the favorite views as renamed, if renamed, will appear just below the icons at the top of the SoftPro 360 Widget screen. There will also be a count of the number of items that meet the criteria of the view. Clicking on one of the view names will switch the view to the one selected, in lieu of using the view dropdown.



Another variation of **Views** is to use the  **Find** icon to do a file search, in the Impact database, to select a specific file to use in the **Views** field to select all transactions for a specific file. This is the same **File Search** routine users of Impact are familiar with. Once a file is clicked on, in the **File Search** results screen, the **Views** field will reflect "**Search: #####**" and the items presented on the screen will be related to that specific file.


A third variation of **Views** is to use the  **SoftPro 360 Search** icon. It will bring up the **SoftPro 360 Search** screen, shown below. Entering a value in one of the search fields and then clicking on the Search button will initiate the search. The results of the search will override the current View with a **View** called **Search Results**. This search is of all of the SP360 transactions in the user's organizational unit.





The **SoftPro 360 Search** screen will not close after the search is conducted. It can be moved to another area or screen so the results can be seen and worked with; then it can be reused by clicking on the **Clear** button and entering new search criteria. It is closed via the  **Close** icon.



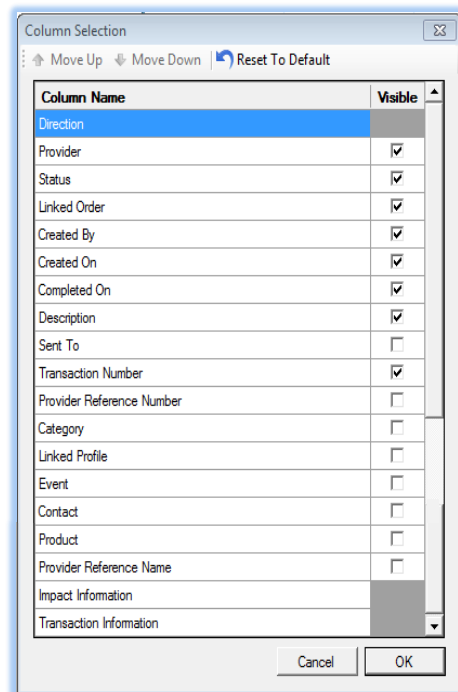
The search options may include fields that are not in the current **View**. (See the next section of this documentation for information on presenting and arranging columns in the widget view.) Multiple options can be selected to narrow the search results. Limiting the options used will broaden the search results. The options are:


- **Transaction Number** – this is the SP360 transaction identifier.
- **Linked Order** – this is the Impact/SQL file number that has been tied to the transaction(s).
- **Created By** – the exact name of the username (there is not a “like” or wildcard feature).
- **Status** – use the dropdown arrow to select the desired status (New, Ready, In Progress, etc.).
- **Direction** – use the dropdown arrow to select “Inbound” or “Outbound”.
- **Sent To** – the identifier of the customer; enter exactly.
- **Category** – the description of the transaction category (“Order Origination”, for example), enter exactly.
- **Provider Name** – use the dropdown to select the provider (RealEC, Ellie Mae, etc.).
- **Service Name** – use the dropdown to select the service to search for.
- **Provider Reference Number** – the number assigned to the transaction by the provider; enter exactly.
- **Event**: event codes and descriptions, if utilized by the product.
- **Contact**: the email of an assigned contact for the order.
- **Provider Reference Name**: the name the provider uses to reference the vendor
- **Product**: the product code and description, if utilized.
- **Created On** – date range “From” and “To”; can use the Calendar tool.
- **Completed On** – date range “From” and “To”; can use the Calendar tool.




The columns presented, and their order, in the various **Views** can be customized, by each user, with the  **Column Selection** icon (to the right of the **Logoff/Login** button). Each View can be customized independently.

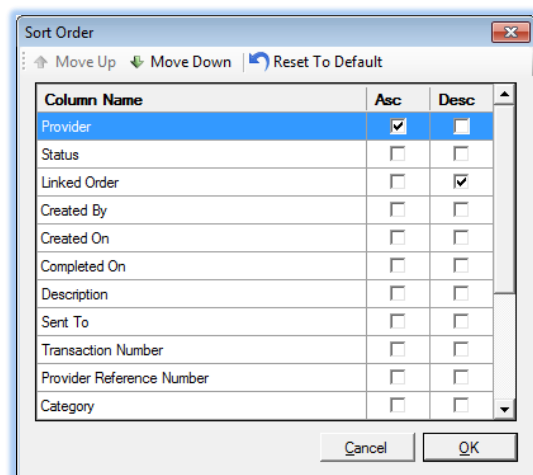
Clicking on the  **Column Selection** icon, when in a particular view, brings up the **Column Selection** screen shown here. The **Direction**, **Impact Information** and **Transaction Information** columns cannot be moved nor deselected. The other columns can be selected by checking the checkbox under the **Visible** heading, and are deselected by unchecking the box. Clicking on any of the **Column Names** (other than the three mentioned above) will enable the  **Move Up** and  **Move Down** icons, which will let the user re-arrange the order of the columns in the **View**. The  **Reset to Default** icon can be used to put the column selection back to its original state.

Click on the **OK** button to save the changes to the **View's** column set and order; click on **Cancel** to exit without saving.



The  **Sort** icon will bring up the **Sort Order** screen on which the user may set a specific sort order that they prefer. It will apply to all views. The user should put a checkmark in the desired column (Ascending or Descending) for the field(s) on which they wish to sort the views' results. They may prioritize the sort order by moving a **Column Name** entry up or down in priority.

Highlight the record to be reprioritized and use the  **Move Up** and  **Move Down** icons to put the record in the desired position. The  **Reset to Default** icon is used to clear the user-set custom sort order.



There are four icons near the top left of the SoftPro 360 widget window that are used to trigger actions to a highlighted transaction. The icons will only be active if their function is available for the highlighted transaction.



**Next Step** – this icon should be clicked after the transaction that is to be worked with is highlighted on the view of transactions. It will take the user to the next functional step for the highlighted transaction.



**Cancel** – this icon will cancel the highlighted transaction, if available for the specific product.



**Messages** – this icon will present messages that are tied to the highlighted transaction. If there is an envelope icon in the first column of the transaction list, on a particular transaction, it may indicate there are messages associated with the transaction, and highlighting such a transaction will enable the Messages icon, if available for the specific product.



**Logs** – this icon will bring up a listing of events related to the highlighted transaction.

There are two icons that will appear next to each item in the queue as shown below:

	Provider	Status	Linked Order	Created By	Created On	Completed On	Description
✚	RealEC	Ready	2015040003	RealEC Service Ac...	04/20/2015 07:14 AM		Buyer, Bob, 1012 Main Str Raleigh, NC, Closing -
✚	RealEC	Ready	2015040213	RealEC Service Ac...	04/17/2015 01:17 PM		Homeowner, John, 4250 CONNECTICUT AVE N
✚	RealEC	Ready	2015040208	RealEC Service Ac...	04/16/2015 08:04 AM		Homeowner, John, 4250 CONNECTICUT AVE N
✚	RealEC	Ready	2015040208	RealEC Service Ac...	04/16/2015 08:02 AM		Homeowner, John, 4250 CONNECTICUT AVE N











**File Status** – this icon will display the Impact File Status screen. **Note:** this icon will only be present when the transaction has been linked to an Impact File.



**Information** – this icon will display a dialog with the transaction summary information.

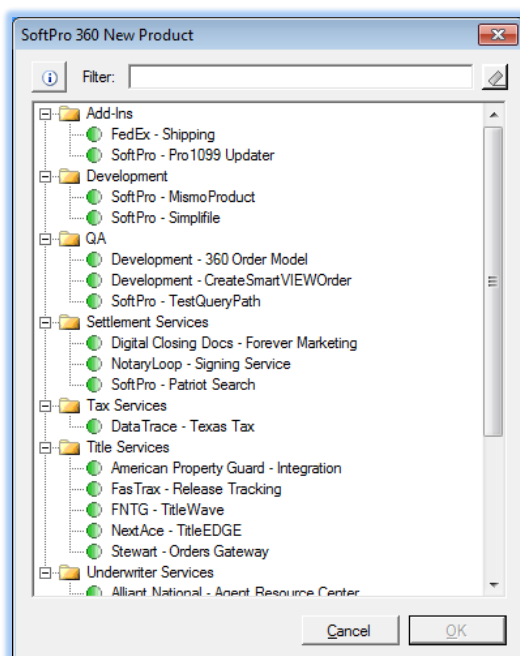
There are several icons that may appear next to each item in the queue as shown below:

	Provider	Status	Linked Order	Created By	Created On	Completed On	Description	
	Simplifile	Updated	00000001	Darel DaVee	06/12/2014 10:47 AM			
	Simplifile	Updated	00000001	Darel DaVee	06/12/2014 08:00 AM			

-  **Inbound** – this icon will display when the transaction is inbound.
-  **Outbound** – this icon will display when the transaction is outbound.
-  **High Priority** – this icon will display when the transaction is designated as high priority
-  **New Message** – this icon will display when the transaction has a message associated with it

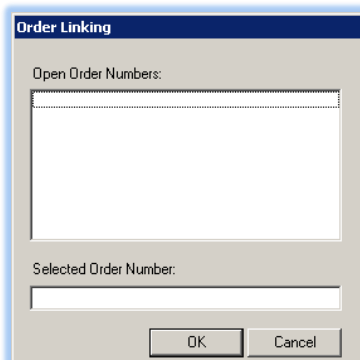
## NEW PRODUCT

The **New Product** button, at the top, middle, of the SoftPro 360 widget window, is used to initiate a new transaction with one of the available service providers. When clicked on, the **SoftPro 360 New Product** window will open, presenting a tree-listing of all of the available service providers.



The user will click on the product entry with which they wish to initiate a transaction, and then click on the **OK** button (which will only be activated if a product is highlighted).

This will present the **Order Linking** screen shown here. If the user has a file open on their Impact desktop, that order's number will appear in both the **Open Order Numbers** box at the top of the screen and in the **Selected Order Number** field. If no file is open on the user's desktop, the screen will be blank and the user should type in the full file number (including any leading zeros) in the **Selected Order Number** field, and then click on **OK**. If the user changes his/her mind



about ordering a service, they should click on the **Cancel** button.



Once an order number has been entered and **OK** is clicked upon, the widget hands off the file number to the specific integration for the product and the user will be presented with the screen(s) relating to that integration. There is separate documentation that details the user experience within each service module. This documentation can be reached at [usadsi.com](http://usadsi.com).