

## Managing GPS Orders within the Impact Widget SoftPro 360

The SoftPro 360 integration with GPS provides SoftPro 360 users the ability to receive Title and/or Escrow order requests electronically from several external sources and customers. In addition to accepting order requests, a new order can be created with an extended amount of data seamlessly flowing into Impact/SQL, increasing productivity, efficiency and removing data re-entry.

### Accessing New GPS orders in the SoftPro 360 queue

New orders sent from GPS will appear in the SoftPro 360 widget queue under the **New Transactions** view. A new GPS Title order and Escrow order will appear in the SoftPro 360 queue as a single transaction. The **Description** column will indicate the product (Title, Escrow or Title & Escrow) requested, the requestor and the requestor's address.

Provider	Status	Linked Order	Created By	Created On	Completed On	Description
GPS	New			05/22/2014 09:53 AM		Escrow only Order From - Fred QA...
GPS	New			05/22/2014 09:52 AM		Title & Escrow Order From - Fred Q...

If the user holds their cursor over the **Description** field the full content will be shown in a floating window.



The Info icon, to the right of each order, can be used to quickly see some information on the order's source.

To review a new transaction, highlight and double click the transaction or highlight and click the **Next Step** icon. The **Global Premier Services** order review screen will open. The Global Premier Services screen will display all the data sent from the requestor (generally a lender), through GPS, to SoftPro 360. Upon initial opening, all order detail will be presented on the right side of the screen. The tree-view on the left of the screen can be used to limit the data presented to sub-sets of the whole. Click on the **Order Detail, Buyers, Sellers, Listing Agents, Selling Agents, Properties, Notes** or **Loans** branches to view the data set in a particular category. Initially, the tree will be collapsed, with all branches reflecting a "+" in front of those that can be expanded. Clicking on the "+" will expand the branch to show the underlying detail headings. Clicking on the resulting "-" sign in front of an entry will collapse that branch. Some branches have been expanded in the sample order shown below.

Groups	Data	Current Value	New Value
OrderDetail	<input checked="" type="checkbox"/> Name		Title only
Buyers	<input checked="" type="checkbox"/> Order Type		
Buyer 1	<input checked="" type="checkbox"/> Entity Type		Individual
Buyer 2	<input checked="" type="checkbox"/> First Name		Simon
Sellers	<input checked="" type="checkbox"/> Last Name		Mallbuy
Listing Agents	<input checked="" type="checkbox"/> Name		Simon Mallbuy
Listing Agent 1	<input checked="" type="checkbox"/> Email		simon.mallbuy@stest.com
Selling Agents	<input checked="" type="checkbox"/> Address 1		123 Mallbuy Dr
Properties	<input checked="" type="checkbox"/> City		Rural Hall
Notes	<input checked="" type="checkbox"/> State		NC
Loans	<input checked="" type="checkbox"/> Zip		27098
Loan 1	<input checked="" type="checkbox"/> Mobile Number		(123)123-1231
Loan 2	<input checked="" type="checkbox"/> Entity Type		Individual
Loan 3	<input checked="" type="checkbox"/> First Name		Tina
Lender 2	<input checked="" type="checkbox"/> Last Name		Mallbuy

The user's routine, in the GPS screen, is to determine the file that the data should be put into – either creating a new file or identifying an existing file – and then to scrub the data to ensure that what is being imported is in the proper form, and, finally, to import the data into the Impact file.

Across the top of the screen, there are several icons which facilitate the process.



**Select All** - this icon is used to place a checkmark on each data item. If the user has unchecked some fields and then determines that all should be re-checked, clicking this icon will check all data items.



**Select None** - this icon is used to uncheck all data items. If the user wishes to only import a few data items, this icon can be used to uncheck all data items, then the user can manually check those items to be imported.



**Field Codes** - this icon is NOT used in the Impact/SQL environment.



**New Order** - this icon is used to initiate the **New File** routine in Impact. This will be discussed below.






**Order Search** - this icon is used to initiate the **File Search** routine in Impact. This will be discussed below.

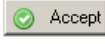
The system will attempt to import all data with a checkmark in the check box into an Impact/SQL order, when the order is accepted. By default all check boxes are checked. The incoming data sent from GPS will be displayed under the **New Value** column. The **Current Value** column displays data that is currently in the order. Initially, as no file is **Linked To** the order, the **Current Value** column will be blank. Once a file is identified in the **Linked To** field, if there is existing data in the Impact file, it will be presented in the **Current Value** column.

There are three options to attach the order data to an Impact file (establish a **Linked To** file): Create a **New Order**, use **Search Order** or **Linking To** an order that is currently open on the user's Impact desktop. In the screen shot below, the user had file "00000001" open on their desktop when they opened the Global Premier Services order review screen for a particular request. The user could bring the data from the order into that file by using the dropdown and selecting that file number; or, if that is not the file that the order data should be imported into, the two Order icons can be used to open a new file or find another existing file.



- Clicking the  **New Order** button will open the Impact **New Escrow File** screen. Once the New File options have been selected (**File Type**, **File Number Option** and **File Copy Options**, if any) the user should click **OK**, on the Impact **New Escrow File** screen, to have the new Impact file created. As usual, the user will be prompted to confirm they wish to create a new file. A **Yes** response will cause the new file to be created and the new file number will be placed in the **Linked To** field on the GPS order review screen. At this point, *no data has been imported* into the new file.
- Clicking the  **Order Search** button will open the Impact **File Search** screen. The user should change the **Filter** to "File Number", if they know the file number, and enter the file number in the **Search For** field, and click on **Search**. Double-clicking on the search result will put the file number into the **Linked To** field on the GPS order review screen. At this point, *no data has been imported* into the new file.
- If the Impact file that the data should be entered into was already open on the user's desktop, the user should click on the **Linked To** drop down arrow and select the Impact File number. At this point, *no data has been imported* into the new file.

Once the Impact file number has been selected and is displayed in the **Linked To** field of the GPS order review screen, the user should review the data that is presented in the **New Value** column to see if all looks to be in acceptable. Unchecking an item will indicate that that item should not be imported. The  **Edit** icon, to the right of each data point, will bring up the **Edit New Value** screen, through which the data can be altered, as needed.

Once the data is acceptable to the user, the user should click on the  **Accept** button at the bottom of the GPS order review screen. All data that was checked will attempt to be imported into the identified file and the user will be put into the first screen of **Initial Questions**. All of the data, on all screens should be reviewed and updated as needed.

Once the file has been reviewed, and the user clicks the **Save & Exit** icon, in Impact, they will get the normal prompts about submitting the order to Title (if they did not already submit it) and printing the Title Instructions. After responding to those prompts, the data entry screen will be closed, the file will remain open on the desktop, and the GPS order item will be removed from the **New Transaction** view, as the status on the order will have been changed to **Completed**. GPS will receive a notification that the new order has been accepted, along with the file number assigned. Once a transaction has a **Completed** status no further actions can be taken on it via the SoftPro 360 widget.

From that point, the file is worked in Impact as all files are worked.