

Managing RealEC Orders within the Impact/SQL Widget SoftPro 360

The SoftPro 360 integration with RealEC provides SoftPro 360 users the ability to receive Title, Escrow/Closing and/or Document Signing order requests seamlessly from several lenders. In addition to accepting order requests, a new order can be created with an extended amount of data automatically flowing into Impact/SQL increasing productivity and efficiency. Data, Documents and Comments can be sent back and forth throughout the life of the transaction.

Accessing New RealEC orders in the SoftPro 360 queue

New orders sent from RealEC will appear in the SoftPro 360 queue under the '**New Transactions**' view. In a situation where many services are utilized through the Impact/SQL SoftPro 360 Widget, a couple of custom views might be helpful to isolate new and in-progress RealEC orders only. (Creation of custom views is done by a system administrator.) It will be helpful if the **Provider Reference Number** is on the screen; if it is not, it can be added with the **III Choose Columns** icon, at the top right of the screen.

Title orders, Closing orders and Document Signing orders will appear in the SoftPro 360 queue as separate transactions. The **Description** column will reflect which transaction contains the Title Order, the Closing Order and the Document Signing Order but related transactions will all have the same **Provider Reference Number**, which is equivalent to RealEC's order number.

	SoftPro 360									
O O Views: RealEC New New Product A Filter:							🖉 Logoff	≣≣ Ž ↓		
		Provider	Status	Linked Order	Created By	Created On	Completed On	Provider Reference Number	Description	▲
		RealEC	New		RealEC Service Ac	09/25/2014 10:26 AM		13453326-10533092	Monroe, Miles, 1	•
		RealEC	New		RealEC Service Ac	09/25/2014 10:00 AM		13453326-10533092	Monroe, Miles, 1	(i)
	اي	RealEC	New		RealEC Service Ac	09/25/2014 10:00 AM		13453326-10533092	Monroe, Miles, 1	()
1	*	DANIEC	New		DeplEC Contine An	00/04/0014 07-4C AM		12452226 10522040	toot2 toot1 247	

The (1) Info icon can be used to bring up a summary screen on the transaction, without any action keys.

To review, and accept or reject, a new transaction highlight and double click the transaction or highlight and click the **Next Step** icon. The **Review** screen will open and display all the data sent from the Lender.

🕹 Review 💽										
😴 Select All 🔿 Select None ا 🎆 Field Codes 🛛 🌴 New Order 名 Order Search 🛛 Linked To: 🔹										
Groups	≣ Groups 💿 Data									
All			Name	C	urrent Value	١	lew Value			-
Order Data Properties			Order Type			Ti	tle only			
Buyers			Sales Price			0				-
			Transaction Type			P	urchase			
			Property Type			Si	ngle Family			
			4 11 4							-
Information: Ev	ent 100	0 - Servi	ce Received				🔽 Add T	o Proform	Note	5
Name					Value					
Due Date:					09/30/2014 00:00:00					
Instructions:					Title Sales Rep: Bonnie Clyde					
Documents	5									
View	Сору	Docume	ent Name	File	e Name		File Size	Transferr	ed	
V		81a41f2	999944cf08e8dfe4c2b780a44	81a	41f2999944cf08e8d	ffe4c2b780	a44.d 149223	100%		
		22429c4	24ed040ce81f0dd622f0c1f18	224	29c424ed040ce81f	0dd622f0c	1f18.p 1448387	100%		
						Acce	ept 🥥 Rejec	t	Close	

All data with a checkmark in the check box in front of the field names will be entered into an Impact/SQL file upon acceptance. In the sample screen to the left, the checkboxes are shown boxed in red. The checkbox at the top will check or uncheck all fields.

If documents are sent with the RealEC order they will be displayed in the bottom section of the **Review** screen and can also be accepted into an Impact/SQL file. Accepted documents will be attached to the Impact/SQL file and stored in **User Attachments** (and can then be published to smartVIEW for FNF sites on smartVIEW). There are three options to attach the RealEC-provided data into an Impact/SQL file: Create a new order/file; search for an existing file and import the data into it; or, import the data into a file currently open on the desktop. At the top of the **Review** Screen, the three options are presented: **New Order**, **Order Search** and **Linked To:** with a dropdown that will present the number of the open file, if there is one on the desktop.

	-	3
😚 New Order 🖌 Order Search 🛛 Linked To:	-	
	0000001	J I

- Clicking the New Order button will open the Impact/SQL New Escrow File screen. Once the New File
 options have been entered the user should click OK. Clicking OK will place the new file number into the
 Linked To field on the Review screen, open the file within Impact/SQL and return the user to the Review
 screen. The user should then click on the Accept button. The data will be imported into the file and they will
 be put on the first screen of Initial Questions to complete the new order review.
- Clicking the Order Search button will open the Impact/SQL File Search screen, where the user can search for the file by many criteria. Once the file is located, highlight and double click the desired file number. The chosen file number will be placed into the Linked To field on the Review screen. At that point, the user should click on the Accept button to import the data into the selected file. The file will <u>not</u> be opened onto the desktop in Impact/SQL.
- If the Impact/SQL file that the data should be entered into is already open on the desktop, click the Linked To drop down and select the Impact/SQL file number. The user should then click on the Accept button to import the data into the selected file. The file will remain open on the desktop.

Once the Impact/SQL file number has been selected and is displayed in the **Linked To** field, click **Accept**. An event code **Event 130 – Service Confirmed** will be sent to RealEC and the SoftPro 360 / RealEC transaction will update to an '**In Progress**' status. The status change will result in the transaction dropping off of the SoftPro 360 widget screen, as it is no longer flagged as '**New**', once a refresh occurs.

NOTE: The order can be rejected by clicking the **Reject** button. Transactions that are rejected will be displayed in the SoftPro 360 queue as '**Rejected**' with no further action being available to the transaction. RealEC and the lender will be notified that the order was rejected.

If applicable, the additional RealEC orders on the same **Provider Reference Number** (Title, Escrow/Closing and/or Document Signing) will also need to be Accepted or Rejected. If Accepted the steps above also apply but the data would <u>not</u> be re-imported – see the NOTE below. Generally, for the additional RealEC orders either the **Order Search** or **Linked To** option would be used.

NOTE: The bulk of the data sent from the Lender should <u>only</u> be accepted on the <u>first</u> order transaction for a specific file (Title or Escrow). On acceptance of any related order transaction, the checkbox to the left of the **Name** column header should be unchecked (to unselect all data points) <u>before</u> **Accept** is clicked – so that the previously imported data is not overwritten (on the chance some may have been altered locally already) – and only one field should be checked – where no change is being made. A warning will be received indicating not all of the data has been selected, which is OK; click **OK** to continue with the acceptance step for the supplemental order.

Notes on the acceptances will be retained in the **File Notes**.

File Notes					23]			
📴 Change File	👍 New Entry	Print			A .				
Escrow File #	: 44440566	Branch: 001 - Escrow Branch(ET Mapped)							
Escrow Officer	: JWE - WESB EO	(JWE)							
Date/Time	By	Description	1	Int	File Note Entry				8
09/25/2014 12	WESB EO(JWE)	RealEC - 09/25/2014 12:36:18 - Event 100 - Submit			Escrow File #: 44	4440566	Branch:	001 - Escrow Branch(ET Mapped)	
09/25/2014 12	WESB EO(JWE)	RealEC - 09/25/2014 12:30:42 - Event 100 - Submit			Internal use only	WE - WESB EO(JWE)			
When a Doc document sig	ument Sig i gning are pu	ning order/transaction is accepted, notes on the it into File Notes .			RealEC - 09/25/2014 12 Doc Signing Specific No Date Sensitive Docs: : N Req Signing Date Time: Req New Deed: : No Signing Location Type: Signing Method: : AGT	2:38:46 - Event 100 - Submit otes No : 09/26/2014 00:00:00 : COFFICE			*

Updating an 'In Progress' RealEC transaction

To access an **'In Progress**' transaction, to send or receive Events, change the SoftPro 360 queue view to **'Active Order**' once the related file is on the desktop (or a custom view of RealEC transactions 'In Progress', if one has been established). If the user has the file involved open on their Impact/SQL database, only records related to that file will present with the **'Active Order**' view.

	SoftPro 360										
🖉 💿 🔄 📔 Views: Active Order 🔽 New Product 🏔 🍷 Filter:											
[Provider	Status	Linked Order	Created By	Created On	Completed On	Provider Reference Number	Description		
		RealEC	In Progress	44441201	RealEC Service Ac	03/03/2015 02:19 PM		13453238-10554565	Hockinstein, Holly,	11 🔯 🖲	
I		RealEC	In Progress	44441201	RealEC Service Ac	03/03/2015 02:21 PM		13453238-10554565	Hockinstein, Holly,	11 🙀 🛈	

To update a transaction, highlight it and click the Select Step button, or simply double-click on the transaction. The **Summary Screen** will be displayed. This screen will show all events that have occurred for the transaction. Click the Add Event button to open the **Select Event** screen (shown on the next page).

Sum	Real					
	\sim					
ITEST SP360 V2 Cust - Generic / Title - Commitment Prelim Report (PC3) Action Event Title Serv/Received On Created By						
Action	Event Title	Sent/Received On	Created By			
*	100 - Service Received	03/03/2015 2:21:16	RealEC			
\checkmark	130 - Service Confirmed by Provider	03/03/2015 2:21:10	Scott Chance			

The events listed will vary depending on the order type of the transaction. Select the desired **Event to Submit** then click **Next**.

🥶 RealEC - 44441201	×
Select Event	
Select the ITEST SP360 V2 Cust - Generic Title Event to Submit:	
150 Product Delivered by Provider	
180 Document Delivered by Provider	
220 Comment	
230 Service on Hold	
240 Service Canceled	
260 Service Resumed	
270 Service Completed	
280 Service Cancer Confirmed	
492 Curative Pending	
500 Curative Cleared	
780 Final Documents Posted	
Next	Close

The **Event Information** screen may vary depending upon the event selected. For example, for the event **`150 – Product Delivered by Provider**' a document can be attached. The screenshot below is the Event Information screen for a `150' event.

Click the **Browse** button to browse out to a file/folder location.

Click **Attachment** to attach a document from **User Attachments.**

Click the **ReadyDoc** button to open and attach an Impact/SQL document or smartVIEW-stored document (FNF sites only).

The **Document Name** will default to the name of the document attached but can be modified after it has been attached – the **Rename** button will be activated at that point.

Click **Next** to continue after the document has been attached (and renamed, if need be).

🥶 RealEC - 44441201	×
Event Information	Realec
ITEST SP360 V2 Cust - Generic / Event 150 - Product Delivered by	Provider
	Browse Attachment ReadyDoc Rename Delete
Back	Cancel

The **Event Information** screen will then present a detail screen on which information about the document may be entered (sample shown below). Once the screen has been completed, click on **Next** to continue. If further data is required, an additional screen(s) may be presented.

🥹 RealEC - 44441201	×
Event Information	REALEC
ITEST SP360 V2 Cust - Generic / Event 150	- Product Delivered by Provider
Name	Value
Document Description	HOAPayoff
Document Type	PayOff 👻
Document Status	Final -
Document Version Number	1
	Back Next Cancel

Click on **Next** after the Event Information has been added and the event will be completed, as indicated by the **Successfully sent data to RealEC** screen shown below.

RealEC - 44441201	Successfully sent data to RealEC. The data has been delivered to RealEC.
	Add Event Close

An additional Event can be added by clicking on the **Add Event** button at the bottom of the screen, or click on **Close** to complete the effort. The user will be returned to the **Summary Screen** for the order, with the additional events having been added to it.

RealEC - 44441201							
Summary Screen Real							
ITEST SP360 V2 Cust - Generic / Title - Commitment Prelim Report (PC3)							
Action	Event Title	Sent/Received On	Created By				
¥ -	150 - Product Delivered by Provider	03/03/2015 3:04:44	Darel DaVee				
<	100 - Service Received	03/03/2015 2:21:16	RealEC				
× -	130 - Service Confirmed by Provider	03/03/2015 2:21:10	Scott Chance				

Reviewing Events and Messages for a RealEC transaction

An envelope displayed in the **Summary Screen**, to the left of the **Event Title**, indicates an inbound message is attached to the transaction.

🥶 RealEC - 44441201 🛛 💌							
Sun	nmary Screen		RealEC				
ITES	T SP360 V2 Cust - Generic / Title - Commitment	Prelim Report (PC3)					
Action	Event Title	Sent/Received On	Created By				
	220 - Comment	03/03/2015 3:23:06	RealEC				
×	150 - Product Delivered by Provider	03/03/2015 3:04:44	Darel DaVee				
×	100 - Service Received	03/03/2015 2:21:16	RealEC				
 Image: A second s	130 - Service Confirmed by Provider	03/03/2015 2:21:10	Scott Chance				
💿 Ad	d Event Review		U)				
			Close				

To view the message, highlight the message on the order **Summary Screen** and click the Review Review button to open the **Review** screen.

🕹 Review - 44441201 📃 💽					
Z Select All ■ Select None III Field Codes					
Information: I	information: Event 220 - Comment				
Name	Value				
Comment:	This is a test comment.				
		Accent Reject Close			
		Close			

The **Review** screen will display the message, which can be added to the Impact/SQL **File Notes**. The **`Add to ProForm Notes**' check box will be checked by default to add the **Comment** to the **File Notes** section within the Impact/SQL file. Click **Accept** to send the **Comments** to the Impact/SQL **File Notes** and to be taken back to the **Summary Screen**. Depending on the event that has been received there may be data to be accepted into the Impact/SQL file. For example, event '**325**' is for a '**Loan Contact Update**'. This review screen shows the **New Values** received. By default all values will be selected, but the user can uncheck any records that should not be updated. Click **Accept** to continue.

Groups	O D	ata			 _
All Order Data		Name	Current Value	New Value	^
	V	Loan Contact Full Name		sp360v2 testcust2	
	V	Loan Contact Day Phone		222 222-2222	
	V	Loan Contact Email		nothing@realec.com	E
	V	Loan Contact Fax		333 333-3333	ш
Assigned To Name:					
Assigned To Name:					

NOTE: If another user has the Impact/SQL file open, and an event is accepted that will update data for that file, the user will receive a message that the file is locked and the update cannot be completed at that time.

oftPro 36	;0
Â	Unable to accept. Order number 44440566 is locked.
	OK

Adding an EO/Closer to an order where one is not assigned – using the 4151 Event Code

If the **Contact** on an order is blank or incorrect (seen by adding the Contact field to the Widget queue view), the **Event Code 4151** can be used to add or change the Contact. This information is critical so that emails on the order are sent to the appropriate EO/Closer.

Select the order from the queue to open the **Summary Screen**.

Then click on the **Add Event** button to bring up the **Select Event** screen. Select the **4151 Loan Contact Update** event and click on the **Next** button.

🥶 RealE	C - XOMTR-15-0909		×			
Summary Screen			RealEc		🚳 RealEC - XOMTR-15-0909	
ITES	T FNF SP Select Customer - Common / Closing/Escro	w - Closing and Escrow Service	es (PC29)			RealE
Action	Event Title	Sent/Received On	Created By		Select Event	TECHNOLOGI
× .	130 - Service Confirmed by Provider	05/08/2015 10:50:21	Mya Haugo			
× .	100 - Service Received	05/08/2015 9:13:04	RealEC		Select the ITEST FNF SP Select Customer - Comm	on Closing Event to Submit:
				→	220 Comment 222 Comment Action Required 240 Service Canceled 406 Closing Statement Delivered 433 Closing Statement Distributed by Provider 734 Provider Disbursed Funds 4151 Loan Contact Update	
🕥 Ad	d Event 💿 Review		Ű			Next Close
			Close			

Enter or update the email address of the EO/Closer that the order is being assigned to, on the **Event Information** screen, and click on the **Next** button to add the information to the order.

🥯 R	eaIEC - XOMTR-15-0909	×			
	Event Information	RealEc			
IT	EST FNF SP Select Customer - Common	/ Event 4151 - Loan Contact Update			
Enter the email address of the user who should receive RealEC email notifications for this order. This email address will be displayed in the 'Contacts' column of the SoftPro 360 queue.					
	Name	Value			
	Email Address	mya.haugo@fnf.com			
		Back Next Cancel			

Canceling or Placing a RealEC transaction on Hold

To cancel or place an order on hold, from the **Summary Screen**, click on the Add Event button and select either the **240 – Service Canceled** or **230 – Service on Hold** event from the Select Event screen.

6.00	RealEC - 44441201	
	Select Event	Realec
	Select the ITEST SP360 V2 Cust - Generic Title Event to Submit	:
	150 Product Delivered by Provider 180 Document Delivered by Provider 220 Comment Action Required	
	230 Service on Hold 240 Service Canceled	
	200 Service Resulted 270 Service Completed 280 Service Cancel Confirmed 385 Product Data Delivery 492 Curative Pending 500 Curative Cleared 780 Final Documents Posted	
	Next	Close
		RealEC - 44441201 Cancel Transaction Do you agree to cancel the transaction? TECHNOLOGY
the 240 Service Canceled event i ansaction screen will ask you to conceled. Check the I Agree checkb	s selected, the Cancel onfirm the transaction is to be ox and click on Next to send the	Are you sure you want to cancel this transaction?
C. Revife - 44441201		Back Next Cancel
Event Information	If the Service on Hold F	went 230 ontion is selected the Event
ITEST SP360 V2 Cust - Generic / Event 230 - Service on Hold	Information screen will	present, on which the user should select an er
Name Value Reason Code	from the Value dropdown	to pick the Reason Code identifying why the
28 Legal Description 29 Full Legal Names 20 1002 Aprilication	red asterisk *. Click Nex	t to submit the Service on Hold event with i
31 Abstract Authorization Form 32 Contact Borrower for missing	information associated Reason Code	·
33 Verify loan amount 34 Verify loan amount 35 Need Ioan number for 1st 121 Title Report - Wrong Property	Address The system will then pres	ent Event Information Realer
122 Curative - Borrower Not Resp 123 Curative - Borrower Request	another Event Informat	ion ITEST SP360 V2 Cust - Generic / Event 230 - Service on Hold
Back Next Car	add any comment about t hold event.	The Enter Comment I Add to ProForm order This is a comment associated with the Service on Hold event.
ck Next to submit the Hold event	Comment.	
e Summary Screen will then refle	ct the hold.	
RealEC - 44441201	Image: State Sta	Bark Next Cannal
Summary Screen	REALECTION CONTRACTOR	
ITEST SP360 V2 Cust - Generic / Title - Commitment Prelim Report (PC3)		
Action Event Title Sent/Rece	ived On Created By	

230 - Service on Hold

220 - Comment

03/04/2015 6:57:47

03/03/2015 3:23:06

Darel DaVee

RealEC

~

 \checkmark

Completing a RealEC transaction

To complete a transaction, click on the **Add Event** button on the **Summary Screen** and select the **270 Service Completed** event. Click on the **Next** button to submit the event code.

🥶 RealEC - 44441201	×
Select Event	RealEC
Select the ITEST SP360 V2 Cust - Generic Title Event to Submit:	
150 Product Delivered by Provider	
220 Comment	
222 Comment Action Required	
230 Service on Hold	
260 Service Canceled	
270 Service Completed	
280 Service Cancel Confirmed	
492 Curative Pending	
500 Curative Cleared	
780 Final Documents Posted	
Next	Close

A confirmation message will be displayed. Click **Yes** to complete the order.



The **Status** of the transaction, on the **SoftPro 360 Widget** screen will be changed to **Completed** after a refresh of the screen.

NOTE: Although the transaction will be in a completed status and the Service Completed event has been sent to RealEC, both RealEC & the user can still update the transaction, with all events, up to 6 months from the last event date.