

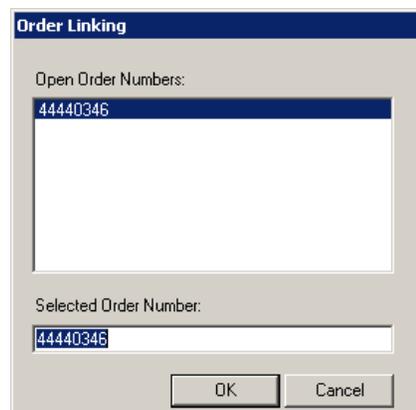
Managing a Microsoft Outlook Appointment within the Impact Widget SoftPro 360

In order to help you maintain a streamlined closing process we now have the ability for you to interact with Microsoft Outlook to schedule directly from your Impact desktop. **SoftPro Appointments** seamlessly pulls the Settlement Date (from the first screen of Initial Questions), Order Parties, and Order Parties' email addresses, from Impact, allowing you to quickly invite closing attendees and schedule your closing.

SoftPro Appointments can be found in the **SoftPro 360** New Product menu in the SoftPro 360 widget.



If you already have a file open on your Impact desktop, the file number will be listed in the **Order Linking** dialog, in both the **Open Order Numbers** field and the **Selected Order Number** field. You may choose to overwrite the **Selected Order Number** with an order that is not currently open; to do so, simply type in the full file number, including leading zeroes, in the **Selected Order Number** field. Once you have confirmed the order to link, click **OK** to continue.



Managing New Appointments

The **SoftPro Appointments** screen lists the Impact order number for which the Outlook Appointment will be scheduled. Under **New Appointment**, the **Appointment Date** will populate from the Settlement Date on the first screen of Initial Questions and the **Time** field will default to 12:00 AM (midnight). These fields can be modified; and the **Time** field should definitely be edited to reflect the correct time of the closing appointment. Parties to the Impact file (that contain email addresses) will be available in the **Contacts** grid. These contacts are grouped and color coded based upon the contact type; the **Buyer** contact group is blue and will show all buyer related contacts, the **Seller** contact group is green and will show all seller related contacts, and all **Other** contacts are grouped together and referenced as orange.

The **Invite** checkbox allows **Contact(s)** to be an email recipient for the Outlook Calendar Appointment. Check the contacts to be invited and click **Invite Selected Contacts**. This will create an Outlook Calendar appointment which will open for review.

NOTE: A **Meeting Location** can be specified. By doing so, when Outlook is launched by clicking **Invite Selected Contacts**, the meeting room will appear in the Outlook Calendar Location field.

SoftPro Appointments (44440346)

Existing Appointments (0)

New Appointment

Appointment Date: 06/05/2014 10:00 AM

Meeting Location: Main Street Branch Conf Room

Select Contacts To Invite:

B1	Buyer1, Test	<input checked="" type="checkbox"/>
S1	Seller, First	<input type="checkbox"/>
O1	Source Attn	<input type="checkbox"/>

Settings Invite Selected Contacts

Close

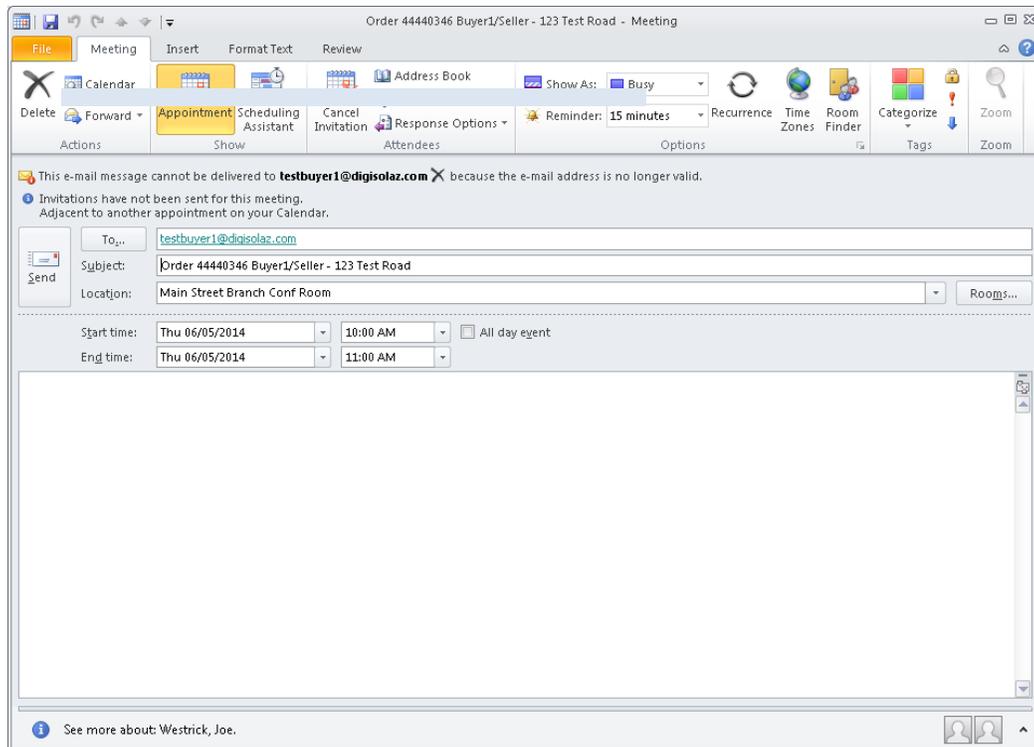
The Outlook Calendar Appointment **To** field will populate with the **Contacts** invited from the **SoftPro Appointments** screen (see the next page for the email prepped for sending). The **Subject** field will populate with the Order number, Buyer's last name/Seller's last name (if applicable), and the property's street address. (If the setting for the **Default Subject** is modified (See Managing Settings), the Subject field will populate accordingly) The **Location** field will populate with the **Meeting Location**, if one was entered on the **SoftPro Appointments** screen.

The Outlook **Start time** will populate with the **Appointment Date & Time** entered on the **SoftPro Appointments** screen.

The **Outlook End time** will populate based upon the **Default Meeting Duration** time selected on the **SoftPro Appointments Settings** screen (See Managing Settings.)

Make any needed changes to the Outlook Calendar appointment and click **Send**.

NOTE: Edits to Location and Start time can be made in Outlook and will flow back to the **SoftPro Appointments** screen. Email recipients can be added and/or deleted and the **SoftPro Appointments** screen will also update accordingly. Contacts added that are not in the Impact order will show in the Existing Appointments section as . Note that the user, if not a party to the file, will be reflected as  as they are an attendee of the meeting.

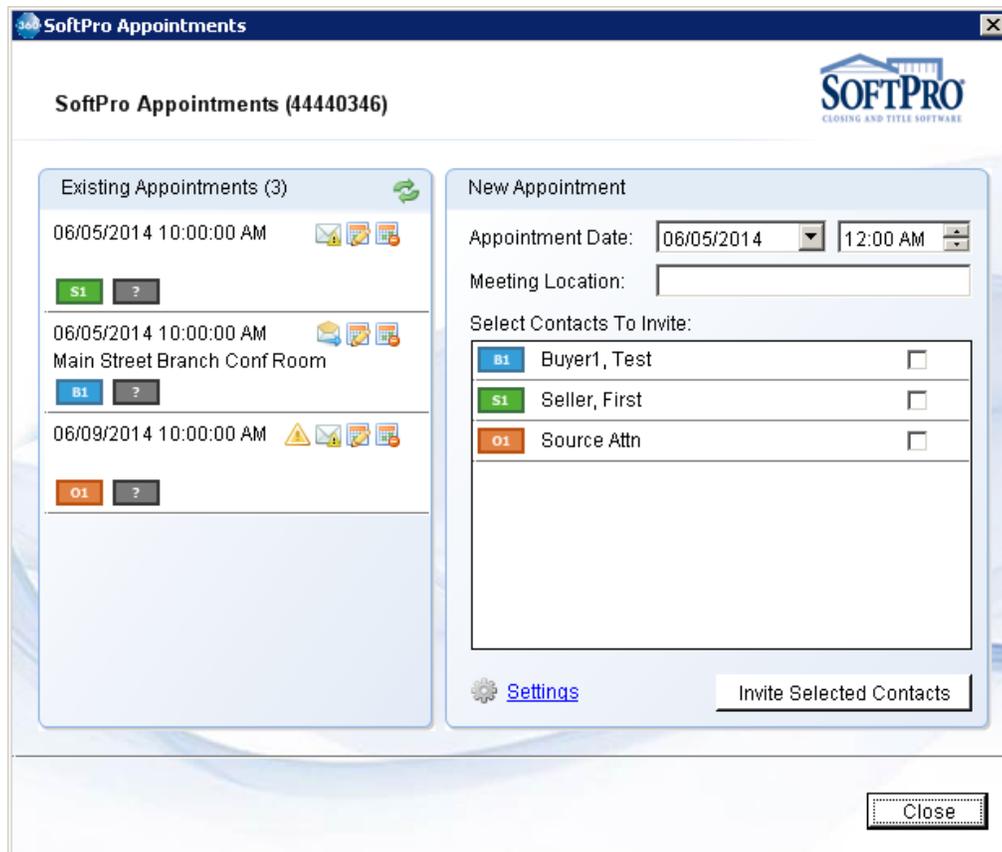


Managing Existing Appointments

Once **Invite Selected Contacts** has been clicked the **Existing Appointments** section of the **SoftPro Appointments** screen will update and show all appointments scheduled for the linked order. The **Existing Appointments** section will display with the following Appointment information: **Date, Time, Meeting Location** (if entered), and invited contact icons.

The following icons will also appear:

- The Outlook Appointment has been created but the emailed has not been sent .
- The Outlook Appointment email has been sent .
- Settlement Date Warning  (if applicable and turned on. See Managing Settings)
- Edit Appointment  (opens the Outlook Calendar Appointment for editing)
- Delete Appointment  (deletes Appointment from **SoftPro Appointments** and Outlook)
- Refresh  (click after making any edits/deletions in Outlook to update SoftPro Appointments)



SoftPro Appointments (44440346)

Existing Appointments (3)

06/05/2014 10:00:00 AM			
S1 ?			
06/05/2014 10:00:00 AM			
Main Street Branch Conf Room			
B1 ?			
06/09/2014 10:00:00 AM			
O1 ?			

New Appointment

Appointment Date: 06/05/2014 12:00 AM

Meeting Location:

Select Contacts To Invite:

B1	Buyer1, Test	<input type="checkbox"/>
S1	Seller, First	<input type="checkbox"/>
O1	Source Attn	<input type="checkbox"/>

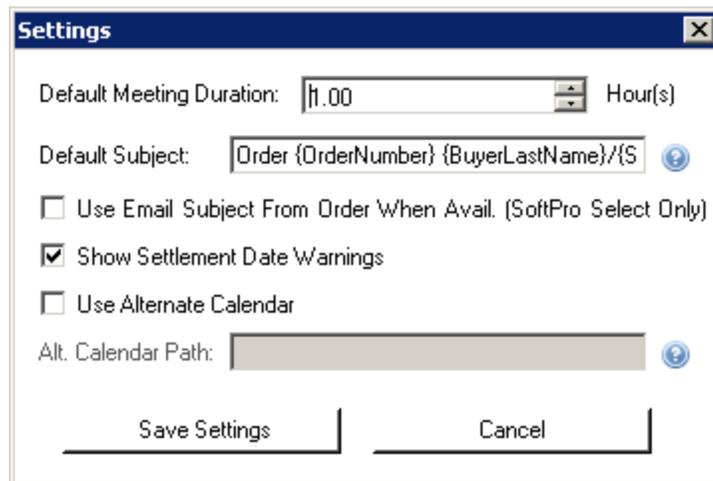
[Settings](#)

Managing Settings

The **Settings** screen button is found at the bottom of the **SoftPro Appointments** screen.

On this screen you can set the **Default Meeting Duration**, customize your Outlook Calendar Subject line through the **Default Subject** field, and select to show the **Settlement Date Warning**.

- The **Default Meeting Duration** determines, in hours, how long an appointment will last. This will be reflected in the Outlook Calendar Appointment as the **End time**.
- The **Default Subject** field is used as the template for the Outlook Calendar Subject line and can be modified. By default the subject line will read as:
{OrderNumber} - {BuyerLastName}/{SellerLastName} {PropertyAddress}
- For SoftPro Select users ONLY (not Impact), the Email subject line field (found on the Order Information screen within Select) will populate into the Outlook Subject line if the **Use Email Subject From Order When Avail.** box is checked.
- When **Show Settlement Date Warning** is checked, the **Settlement Date Warning** icon  will appear in the **Existing Appointments** section of the **SoftPro Appointments** screen if there is a discrepancy between the Settlement date and the Appointment date.



Settings

Default Meeting Duration: 1.00 Hour(s)

Default Subject: Order {OrderNumber} {BuyerLastName}/{S

Use Email Subject From Order When Avail. (SoftPro Select Only)

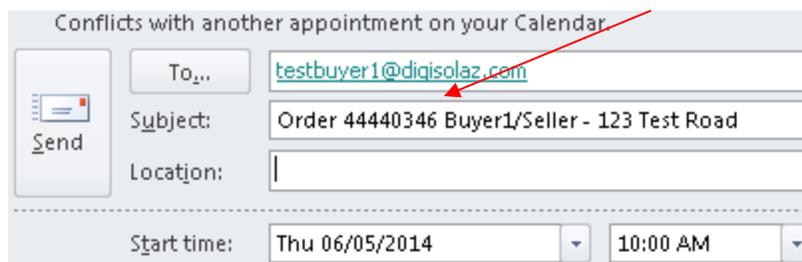
Show Settlement Date Warnings

Use Alternate Calendar

Alt. Calendar Path:

Save Settings Cancel

Hint: Appointments created in Microsoft Outlook will display in **SoftPro Appointments** when the Order Number is entered somewhere within the Outlook Calendar Subject line.



Conflicts with another appointment on your Calendar

To: testbuyer1@digisolaz.com

Subject: Order 44440346 Buyer1/Seller - 123 Test Road

Location:

Start time: Thu 06/05/2014 10:00 AM

Send

Minimum Requirements

The necessary requirements for **SoftPro Appointments** are Microsoft Outlook 2003 or higher. If this requirement is not met the following screen will appear when attempting to launch **SoftPro Appointments**:



In addition, the site must be running version 8.5 (Build 037) of Impact/SQL or later.