

Managing Calyx Point Transactions within the Impact/SQL Widget SoftPro 360

How to Review/Accept Transactions

The SoftPro 360 integration with Calyx Point provides the ability to receive Title and/or Escrow order requests and documents electronically from Calyx Point 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 Calyx Point orders in the SoftPro 360 queue

New orders sent from Calyx Point will appear in the SoftPro 360 queue under the view **New Transactions** – or a custom view established for Calyx Point orders. In addition, an email notification of the new order will be sent to the SoftPro 360 user.

A new Title order and Escrow order will appear in the SoftPro 360 queue as two separate transactions. The **Description** column will indicate the product requested – after the State, in the address.

	Provider	Status	Linked Order	Created By	Created On	Completed On	Description
<input checked="" type="checkbox"/>	Calyx	New		John Doe	02/24/2015 01:29 PM		Smith, Donny, 5613 N 15th St Phoenix, AZ Title Lender - Wel...
<input checked="" type="checkbox"/>	Calyx	New		John Doe	02/24/2015 01:29 PM		Smith, Donny, 5613 N 15th St Phoenix, AZ Escrow Lender - ...

To review a new transaction, highlight the transaction, then click the **Next Step** button – or double click on the transaction. The **Review** screen will display all the data, notes, and documents sent from Calyx Point to SoftPro 360.

	Name	Current Value	New Value
<input checked="" type="checkbox"/>	Buyer Type		Male
<input checked="" type="checkbox"/>	First Name		Donny
<input checked="" type="checkbox"/>	Last Name		Smith
<input checked="" type="checkbox"/>	SSN		123-59-8746
<input checked="" type="checkbox"/>	Address1		5613 N 15th St
<input checked="" type="checkbox"/>	City		Phoenix

Add To Proform Notes

Document Name	File Name	File Size	Transferred
TEST DOCUMENT	TEST DOCUMENT.PDF	82318	100%

Accept

All data with a checkmark in the checkbox in front of the entries in the **Name** column will be accepted into an Impact/SQL file. By default all check boxes are checked. The checkmark in front of the column header will check or uncheck all of the entries.

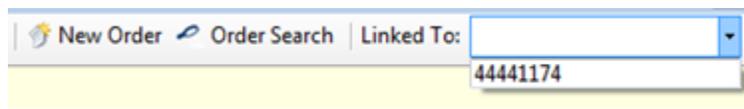
The incoming data sent from Calyx Point will be displayed under the **New Value** column. The **Current Value** column displays data that is currently in the order. The incoming values are also broken down into **Groups**. A specific **Group**, such as **Borrowers**, can be expanded so that only the new incoming values for that group are viewed.

The **Field Codes** icon and function serves no purpose in the Impact/SQL SP 360 integration.

If the new or updated order have any notes or comments attached, the **Add To ProForm Notes** checkbox will be checked by default and the information will be added to the **File Notes** section of the Impact/SQL file, upon acceptance.

To view a document, click the  **.PDF** icon in the **View** column. To copy a document to the clipboard, click the  **Copy** icon in the **Copy** column. On acceptance, the document(s) 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 Calyx Point-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:**, and there is a dropdown that will present the number of the open file, if there is one on the desktop.



- 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 not 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 of the **Review** screen, click the **Accept** button. The transaction status in SoftPro 360 will update to **In Progress**.

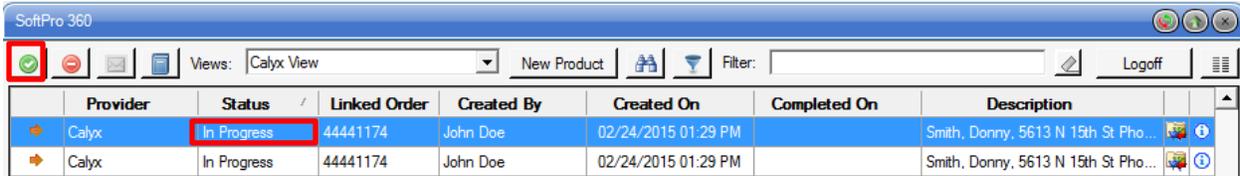
If applicable, the additional Calyx Point order on the same property (Title or Escrow) will also need to be Accepted. When Accepted the steps above also apply but the data would not be re-imported – see the NOTE below. Generally, for the additional Calyx Point order either the **Order Search** or **Linked To** option would be used.

*NOTE: The bulk of the data sent from the Lender should only be accepted on the first 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) before **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**.

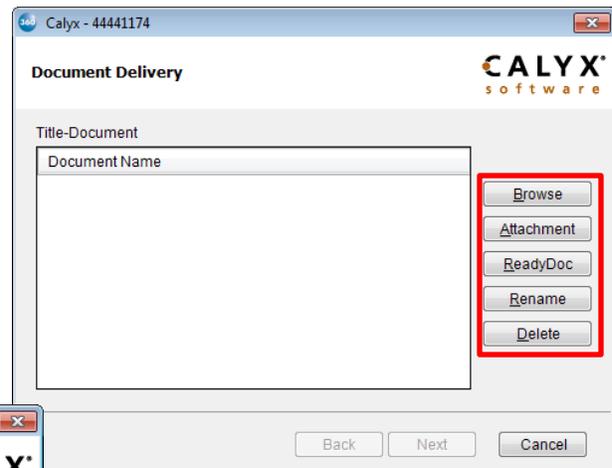
Sending documents back to Calyx Point though SoftPro 360

When the order request is ready to be submitted to Calyx point, highlight the **In Progress** transaction in the SoftPro 360 queue, then click the  **Next Step** button, or double-click on the transaction, to open the **Document Delivery** screen.



Provider	Status	Linked Order	Created By	Created On	Completed On	Description
Calyx	In Progress	44441174	John Doe	02/24/2015 01:29 PM		Smith, Donny. 5613 N 15th St Pho...
Calyx	In Progress	44441174	John Doe	02/24/2015 01:29 PM		Smith, Donny. 5613 N 15th St Pho...

Click the **Browse** button to browse out a file/folder location to select a document, click **Attachment** to attach a document from **User Attachments** or click the **ReadyDoc** button to open and attach an Impact/SQL document or smartVIEW-stored document (FNF sites only). The document description will default to the name of the communication selected but can be modified with the use of the **Rename** button, after highlighting the document to be renamed.



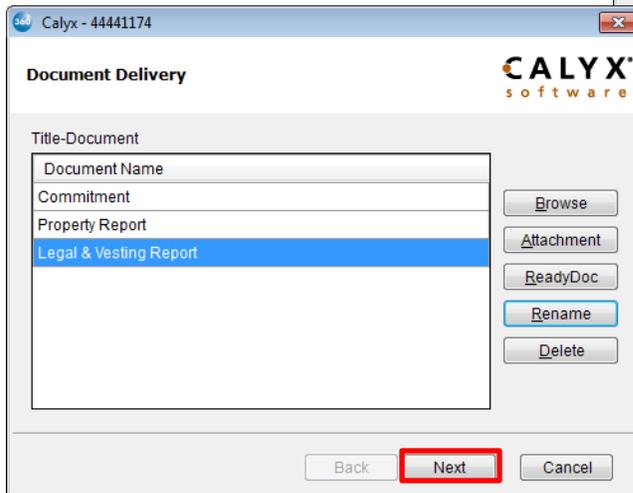
Document Delivery

Title-Document

Document Name

Browse
Attachment
ReadyDoc
Rename
Delete

Back Next Cancel



Document Delivery

Title-Document

Document Name
Commitment
Property Report
Legal & Vesting Report

Browse
Attachment
ReadyDoc
Rename
Delete

Back Next Cancel

The **Delete** button can be used to remove a document from the list to be delivered, if added in error.

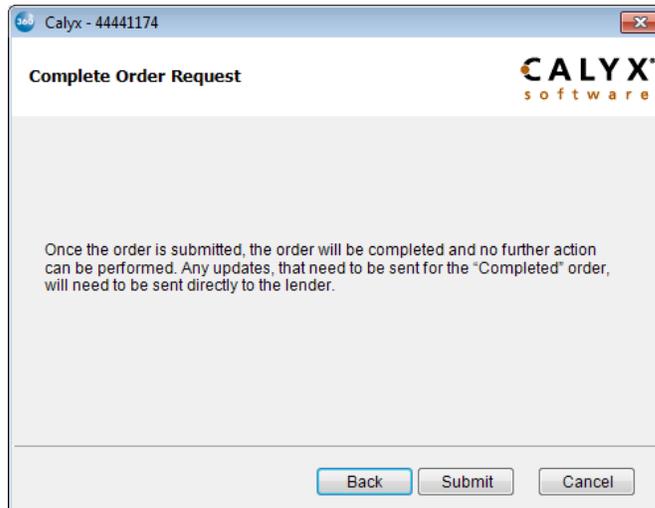
Once the document(s) have been selected, and renamed if applicable, the **Next** button should be clicked to send the documents to Calyx Point.

If the **Cancel** button is clicked, the Document Delivery screen will be closed without submitting any documents.

An order cannot be completed until at least one document is attached to the order request.

When the **Next** button is clicked, with at least one document attached to the order, the **Complete Order Request** screen will be presented. It informs the user that:

"Once the order is submitted, the order will be completed and no further action can be performed. Any updates, that need to be sent for the "Completed" order, will need to be sent directly to the lender."



If all is in order and the order should be considered complete once the document(s) are submitted, the user should click on the **Submit** button. The order status will be updated to **Completed**.

Calyx Point Updates

If the Calyx Point user sends an update on their order, the SoftPro 360 transaction status will update to a **Ready** status, and an ✉ envelope icon will appear in front of the transaction. In addition, an email notification will be sent notifying the SoftPro 360 user that an update has been sent to SoftPro 360.

✉ Calyx	Ready	44441174	John Doe	02/24/2015 01:29 PM	Smith, Donny, 5613 N 15th St Pho...	👤 ⓘ
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In the SoftPro 360 queue, highlight the updated transaction then click the  **Next Step** button, or double-click on the transaction, to present the **Review** screen where the user can **Accept** the altered data, additional comment(s) &/or additional document(s) into the existing Impact/SQL file.

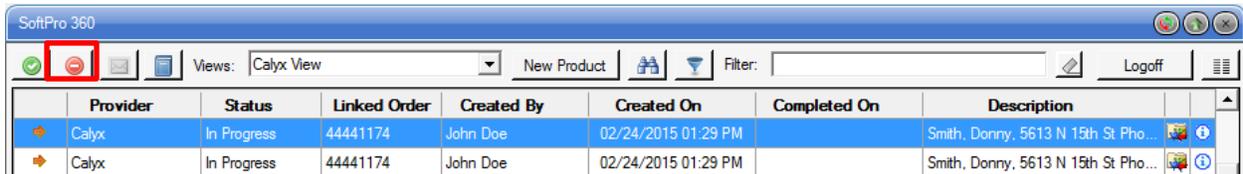
Canceling an Order

An order can be canceled by the SoftPro 360 user or by Calyx Point.

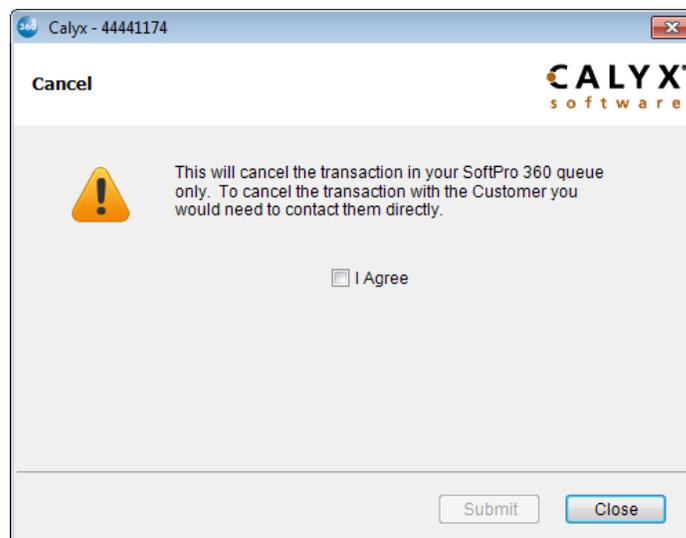
Order Canceled by SoftPro 360 user:

If an order is cancelled from within SoftPro 360, **the customer must still be contacted directly** about the cancellation. Cancelling the order within SoftPro 360 merely changes the order status within SoftPro 360 – no information is routed to the Calyx Point lender.

If the transaction status is **In Progress**, click the  icon to launch the **Cancel** screen. Click the **I Agree** checkbox, then click **Submit**. The SoftPro 360 transaction status will update to **Cancelled**.



	Provider	Status	Linked Order	Created By	Created On	Completed On	Description
	Calyx	In Progress	44441174	John Doe	02/24/2015 01:29 PM		Smith, Donny, 5613 N 15th St Pho...
	Calyx	In Progress	44441174	John Doe	02/24/2015 01:29 PM		Smith, Donny, 5613 N 15th St Pho...



Order Canceled by Calyx Point:

If the Calyx Point user cancels an order, an email notification of the update/cancellation will be sent to the SoftPro 360 user.

After each cancel option (whether by Calyx Point or the SoftPro 360 user) no further action can be done on the transaction.