# Managing FPSDirect Orders within the Impact/SQL Widget SoftPro 360

The SoftPro 360 integration with FPSDirect provides SoftPro 360 users the ability to receive Title & Closing (combined) order requests seamlessly from Citibank. 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. The FPSDirect integration makes use of Event Codes to designate the type of information and/or communication being sent between the vendor (the Title and Escrow operation) and Citibank. The complete workflow (with all events possible) is detailed in this documentation; the minimum workflow is also specified.

Accessing New FPSDirect orders in the SoftPro 360 queue

New orders sent from FPSDirect 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 FPSDirect 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 [icon] **Choose Columns** icon, at the top right of the screen.
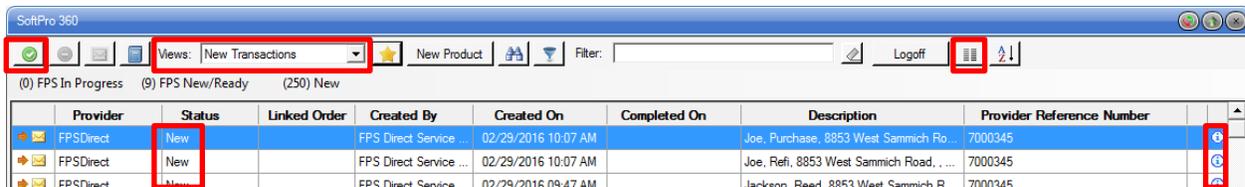

The [icon] **Info** icon can be used to bring up a summary screen on the transaction, without any action keys.

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

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 shown below, the checkboxes are shown boxed in red. The checkbox at the top will check or uncheck all fields.

The middle of the screen (or bottom if no documents are attached) will show some supplemental data in addition to the data presented at the top of the screen. This supplemental data includes payoff information, for one or more loans.

If documents are sent with the FPSDirect 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). In this sample, there are no documents attached to the order.
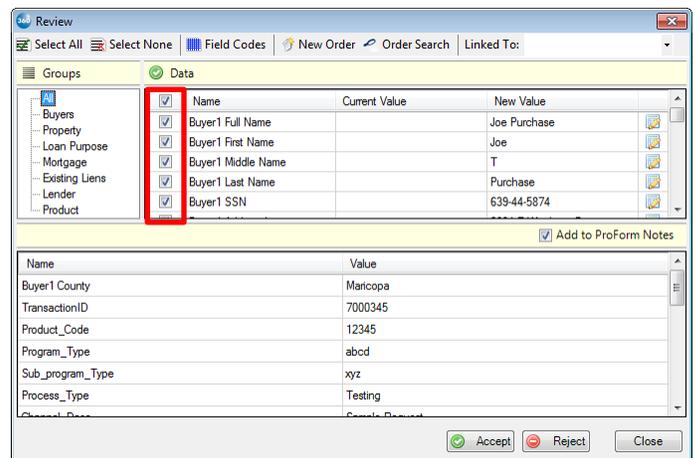
There are three options to attach the FPSDirect-provided data into an Impact/SQL file: Create a new order/file; search for an existing file and import the data into it; or, import the data into a file currently open on the desktop. At the top of the **Review** Screen, the three options are presented: **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.
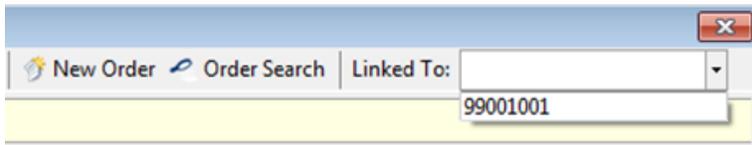

- Clicking the **New Order** button will open the Impact/SQL **New Escrow File** screen. Once the **New File** options have been entered the user should click **OK**. Clicking OK will place the new file number into the **Linked To** field on the **Review** screen, open the file within Impact/SQL and return the user to the **Review** screen. The user should then click on the **Accept** button at the bottom of the Review screen. 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 order has been accepted (with the **Accept** button), an event code **Event 1050 – Order accepted and assigned with notary** (aka: **Order in-Process**) will be sent to FPSDirect and the SoftPro 360 / FPSDirect 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 at the bottom of the Review screen. Transactions that are rejected will be displayed in the SoftPro 360 queue as '**Rejected**' with no further action being available to the transaction. FPSDirect and the lender will be notified that the order was rejected, with a **1070 event**.

Notes on the accepted order will be retained in the **File Notes**.
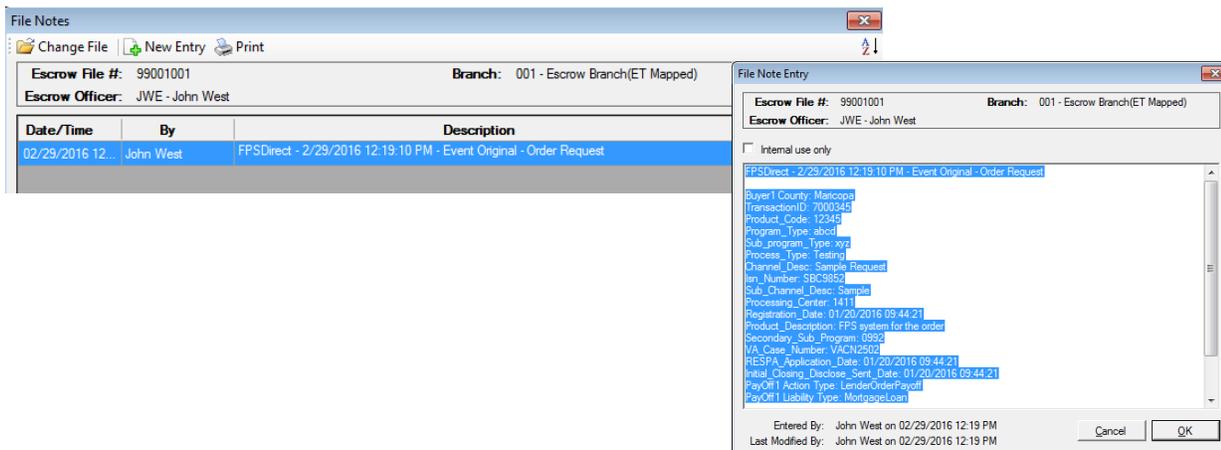
An order, on the SP360 queue, which has the **Status** of '**In Progress**' has been accepted and is pending user action on an **outbound** event.

An order, on the SP360 queue, which has the **Status** of '**Ready**' has been accepted and has an **inbound** event, from the lender, pending user action.

Sending an Outbound Event on an 'In Progress' FPSDirect transaction

To access an '**In Progress**' transaction, to send an outbound event, change the SoftPro 360 queue view to '**Active Order**', once the related file is on the desktop, or a custom view of FPSDirect transactions '**In Progress**', if one has been established. If the user has the file involved open on their Impact/SQL desktop, only a record related to that file will present with the '**Active Order**' view.
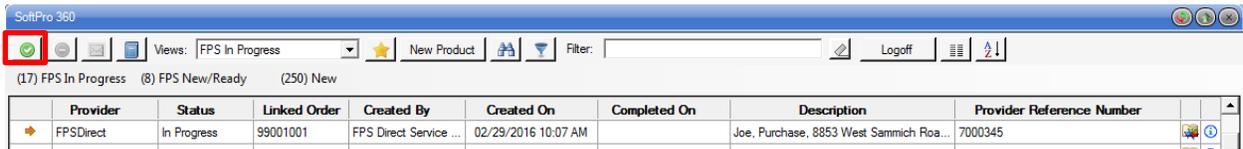
To update a transaction, highlight it and click the ⊘ **Next Step** button, or simply double-click on the transaction. The **Order Summary** screen will be displayed. This screen will show all events that have occurred for the transaction. Click the ⊕ Add Event **Add Event** button, at the bottom of the screen, to open the **Select Event** screen (shown on the next page).
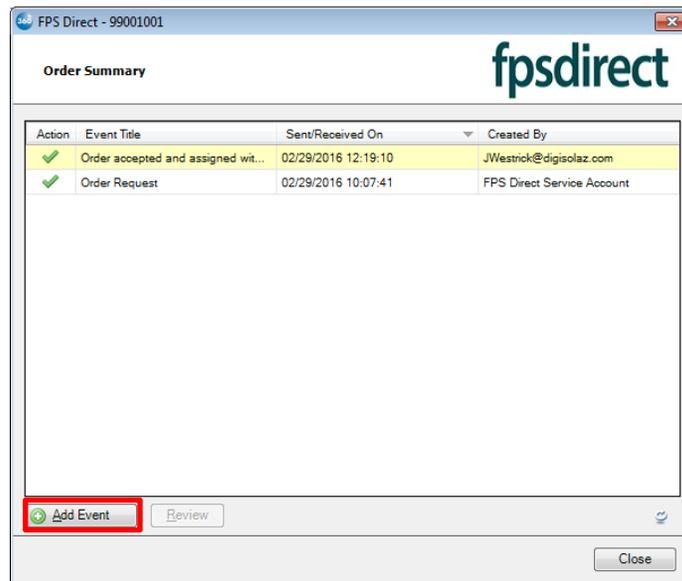
The **Select Event** listing contains all of the **outbound** events available to the user for sending a communication to the lender. In the concatenated screen shots below, the complete listing of outbound event codes is displayed.
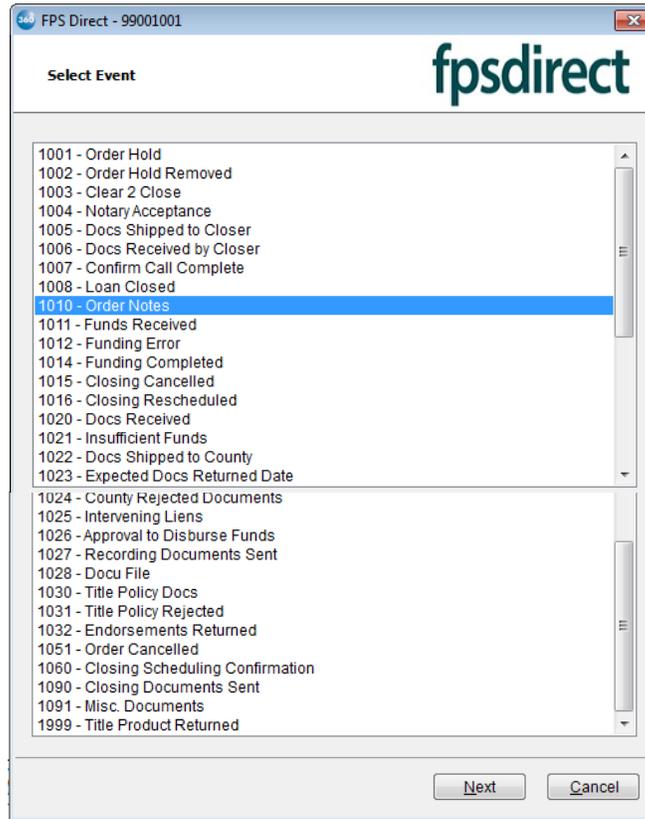
Depending on the event selected, there may be supplemental data required and the user will be presented with one or more screens to collect that information once the desired event is selected and the **Next** button is clicked.

In the following example, the **Order Notes** event is selected, and the user is initially presented with the **Order Notes** screen, which has a **Select Note Description** dropdown at the top of the screen through which the user will pick the category of "note" they are sending to the lender. Once the note **Description** is selected, the body of the screen opens up and the user may enter any additional information that is applicable.

Once any additional notes are made, after selection of the Description, the user will click on the **Submit** button to send the Order Notes to the lender.

The **Sending Data** screen will present while the data is being transferred.

Once complete, the **Order summary** screen will be presented with the additional event recorded thereon.
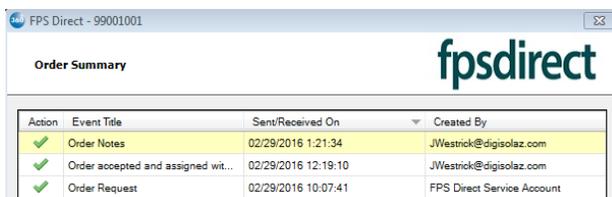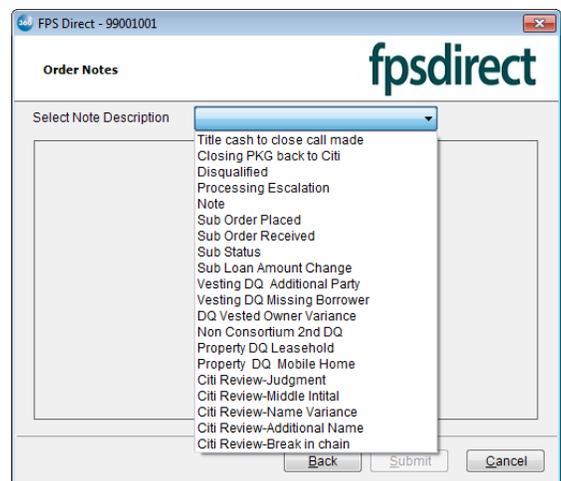
The **Event Information** screen may vary depending upon the event selected. For example, for the event '**1999 – Title Product Returned**' a document (one of an assortment of title products) can be attached. When first opened after the selection of the 1999 event, the Event Information screen has some data pre-loaded from the file and the user must complete any required, but missing, information. The required fields are flagged with a red asterisk (*****) until completed. Dropdown lists are available on some fields to aid with data entry.

Once all of the required data is completed on the **Title Products Returned** screen (shown above), the user will click on the **Next** button to bring up the **Event Documents** screen (shown below), through which the document to be sent to the lender is attached.

Click the **Browse** button to browse out to a file/folder location. Once the document is located, highlight it and select Open to bring it to the Event Documents screen.

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.

The Delete button will also be activated at that point, in case the wrong document was attached.

The user should click on the **Submit** button to continue after the document has been attached (and renamed, if need be). Once the document is sent, the **Order Summary** screen will be presented, reflecting the submitted document event.

Reviewing Inbound Events on an FPSDirect transaction

The '**New and Ready**' view (possibly customized to reflect just FPSDirect transactions), should be checked periodically to determine if there have been events sent by the lender on accepted transactions. While the 'New' status indicated a new order altogether, the '**Ready**' status indicates that a subsequent event has been submitted by the lender. In the screen shot below, the previously linked order reflects a 'Ready' status, in a 'New and Ready' view.

Double-clicking on the '**Ready**' entry in the SP360 queue will bring up the **Order Summary** screen, which will reflect the new event with an envelope icon in front of it, indicating user action is required. The user should highlight the new event and click on the **Review** button, at the bottom of the screen, to open the event; in this case, an **Order Modification**, which will bring up the **Review** screen on which current file data can be compared to new values from the lender, and the user may determine what data to accept, if any. If accepted, the icon in the **Action** column, on the Order Summary screen, will change from the envelope to the green checkmark.

Different inbound events will present different data and actions for the user to address.

There is not an event that flags an FPSDirect order as 'Completed'. Events can continue to be sent between the lender and the Title & Escrow operation indefinitely. However, the 'lifetime' of an FPSDirect transaction within SoftPro 360 will end 90 days after the last event is sent or received. At that point, the transaction will no longer be visible in the SP360 queue.

Workflow for an FPSDirect transaction

The event workflow diagram presented below (provided by the FPSDirect product owner), and on the next few pages, illustrates all possible order events that can occur for a Title & Closing order request. Please note that the order events on any particular order will vary depending on the unique circumstances of each order. There are, however, a set of order events that are static and must occur for each Title & Closing order request, per the lender. These static order events are identified in the workflow diagram with a **BOLD** border and they are shifted to the left (←). The Impact user's actions are on the right side, in blue shading.

FPSDirect Title & Closing Vendor Integration Workflow

FPSDirect		Vendor
FPSDirect sends CLOSING SCHEDULING REQUEST to Vendor	—VENDOR WEB SERVICE 2040→	Vendor receives CLOSING SCHEDULING REQUEST from FPSDirect
	←Synch Acknowledgement—	
FPSDirect receives NOTARY CONTACT/ SCHEDULING ACCEPTED status from Vendor	←HTTP POST W/ STATUS 1004—	Vendor sends NOTARY CONTACT/SCHEDULING ACCEPTED status to FPSDirect
	—Synch Acknowledgement→	
FPSDirect receives CLOSING SCHEDULING CONFIRMATION from Vendor	←HTTP POST W/ STATUS 1060—	Vendor sends CLOSING SCHEDULING CONFIRMATION to FPSDirect
	—Synch Acknowledgement→	
FPSDirect receives CLOSING SCHEDULING CANCELLATION status from Vendor	←HTTP POST W/ STATUS 1015—	Vendor sends CLOSING SCHEDULING CANCELLATION status to FPSDirect
	—Synch Acknowledgement→	
FPSDirect receives CLOSING RESCHEDULED status from Vendor	←HTTP POST W/ STATUS 1016—	Vendor sends CLOSING RESCHEDULED status to FPSDirect
	—Synch Acknowledgement→	
FPSDirect receives DOCS SHIPPED TO CLOSER status from Vendor	←HTTP POST W/ STATUS 1005—	Vendor sends DOCS SHIPPED TO CLOSER status to FPSDirect
	—Synch Acknowledgement→	
FPSDirect receives DOCS RECEIVED BY CLOSER status from Vendor	←HTTP POST W/ STATUS 1006—	Vendor sends DOCS RECEIVED BY CLOSER status to FPSDirect
	—Synch Acknowledgement→	
FPSDirect receives LOAN CLOSED status from Vendor	←HTTP POST W/ STATUS 1008—	Vendor sends LOAN CLOSED status to FPSDirect
	—Synch Acknowledgement→	
FPSDirect receives CLOSING DOCUMENTS from Vendor	←HTTP POST W/ STATUS 1090—	Vendor sends CLOSING DOCUMENTS to FPSDirect
	—Synch Acknowledgement→	
FPSDirect receives ORDER CANCELLED status from Vendor	←HTTP POST W/ STATUS 1051—	Vendor sends ORDER CANCELLED status to FPSDirect
	—Synch Acknowledgement→	
FPSDirect sends ORDER CANCELLED status to Vendor	—VENDOR WEB SERVICE 2020→	Vendor receives ORDER CANCELLED status from FPSDirect
	—Synch Acknowledgement→	
FPSDirect sends RECORDING INITIATED status to Vendor	—VENDOR WEB SERVICE 2030→	Vendor receives RECORDING INITIATED status from FPSDirect
	—Synch Acknowledgement→	
FPSDirect receives DOCS RECEIVED status from Vendor	←HTTP POST W/ STATUS 1020—	Vendor sends DOCS RECEIVED status to FPSDirect
	—Synch Acknowledgement—	

FPSDirect receives INSUFFICIENT FUNDS status from Vendor	◄─── HTTP POST W/ STATUS 1021 ───	Vendor sends INSUFFICIENT FUNDS status to FPSDirect
	─── Synch Acknowledgement ───	
FPSDirect receives DOCS SHIPPED TO COUNTY OFFICE status from Vendor	◄─── HTTP POST W/ STATUS 1022 ───	Vendor sends DOCS SHIPPED TO COUNTY OFFICE status to FPSDirect
	─── Synch Acknowledgement ───	
FPSDirect receives EXPECTED DOCS RETURN DATE from Vendor	◄─── HTTP POST W/ STATUS 1023 ───	Vendor sends EXPECTED DOCS RETURN DATE to FPSDirect
	─── Synch Acknowledgement ─── HTTP POST W/ STATUS 1024 ───	
FPSDirect receives COUNTY REJECTED DOCS status from Vendor	◄───	Vendor sends COUNTY REJECTED DOCS status to FPSDirect
	─── Synch Acknowledgement ───	
FPSDirect receives INTERVENING LIENS status from Vendor	◄─── HTTP POST W/ STATUS 1025 ───	Vendor sends INTERVENING LIENS status to FPSDirect
	─── Synch Acknowledgement ───	
FPSDirect receives APPROVAL TO DISBURSE FUNDS status from Vendor	◄─── VENDOR WEB SERVICE 1026 ───	Vendor sends APPROVAL TO DISBURSE FUNDS status to FPSDirect
	─── Synch Acknowledgement ───	
FPSDirect receives RECORDING DOCUMENTS status from Vendor	─── VENDOR WEB SERVICE 1027 ──►	Vendor sends RECORDING DOCUMENTS to FPSDirect
	─── Synch Acknowledgement ───	
FPSDirect receives DOCU FILE from Vendor	◄─── VENDOR WEB SERVICE 1028 ───	Vendor sends DOCU FILE to FPSDirect
	─── Synch Acknowledgement ───	
FPSDirect receives TITLE POLICY DOCS from Vendor	◄─── HTTP POST W/ STATUS 1030 ───	Vendor sends TITLE POLICY DOCS to FPSDirect
	─── Synch Acknowledgement ───	
FPSDirect receives TITLE POLICY REJECTED status from Vendor	◄─── VENDOR WEB SERVICE 1031 ───	Vendor sends TITLE POLICY REJECTED status to FPSDirect
	─── Synch Acknowledgement ───	
FPSDirect receives FUNDS RECEIVED status from Vendor	─── VENDOR WEB SERVICE 1011 ──►	Vendor sends FUNDS RECEIVED status to FPSDirect
	─── Synch Acknowledgement ───	
FPSDirect receives FUNDS ERROR status from Vendor	─── VENDOR WEB SERVICE 1012 ──►	Vendor sends FUNDS ERROR status to FPSDirect
	─── Synch Acknowledgement ───	
FPSDirect receives FUNDING COMPLETE status from Vendor	─── VENDOR WEB SERVICE 1014 ──►	Vendor sends FUNDING COMPLETE status to FPSDirect
	─── Synch Acknowledgement ───	