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 [icon] **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.

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 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.
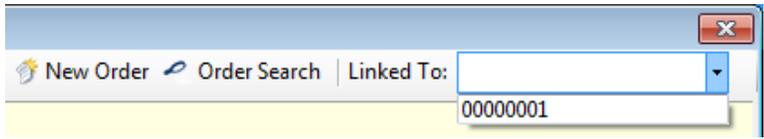
- Clicking the **New Order** button will open the Impact/SQL **New Escrow File** screen. Once the **New File** options have been entered the user should click **OK**. Clicking OK will place the new file number into the **Linked To** field on the **Review** screen, open the file within Impact/SQL and 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**.

When a **Document Signing** order/transaction is accepted, notes on the document signing are put into **File Notes**.

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.

To update a transaction, highlight it and click the ☑ **Next 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 **Add Event** button to open the **Select Event** screen (shown on the next page).

The events listed will vary depending on the order type of the transaction. Select the desired **Event to Submit** then click **Next**.
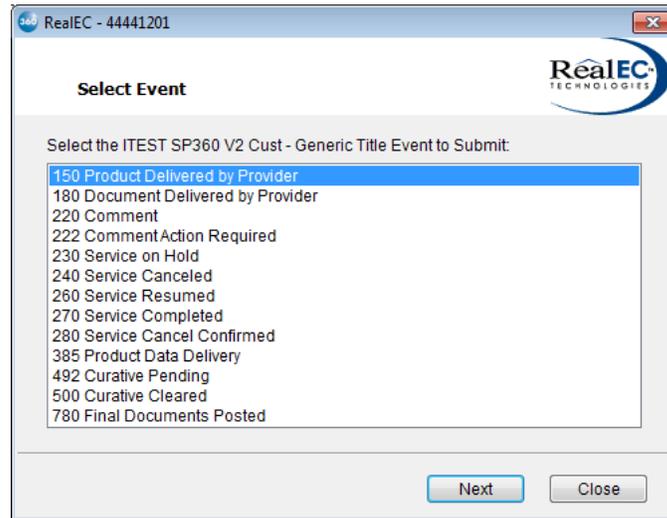
The **Event Information** screen may vary depending upon the event selected. For example, for the event '**150 – Product Delivered by Provider**' a document can be attached. The screenshot below is the Event Information screen for a '150' event.

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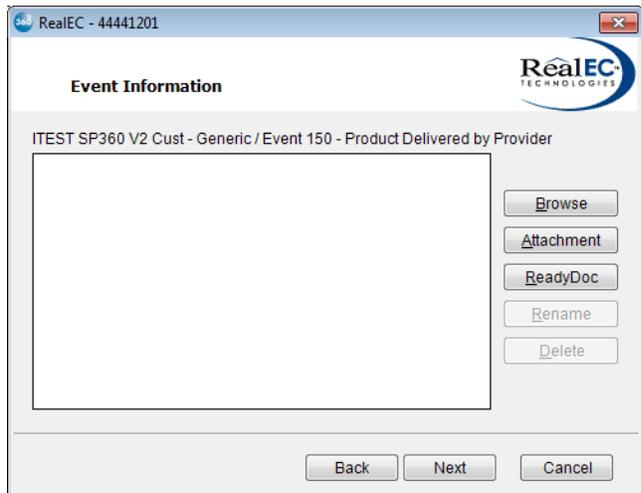
The **Event Information** screen will then present a detail screen on which information about the document may be entered (sample shown below). Once the screen has been completed, click on **Next** to continue. If further data is required, an additional screen(s) may be presented.

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.

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.

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.
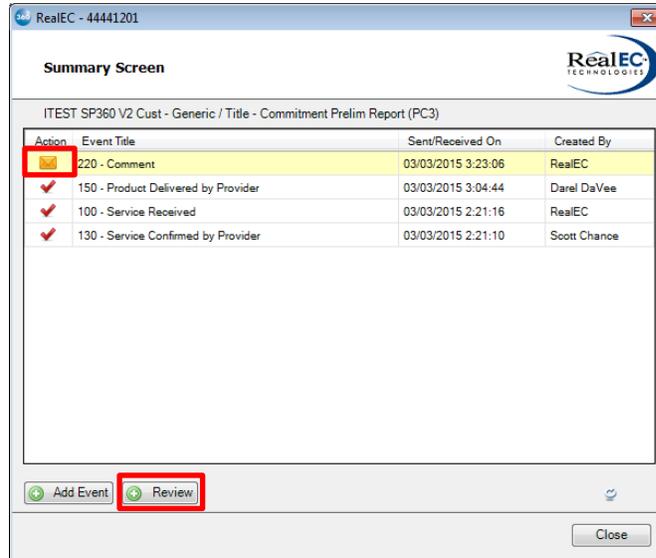
To view the message, highlight the message on the order **Summary Screen** and click the ⊙ Review **Review** button to open the **Review** screen.
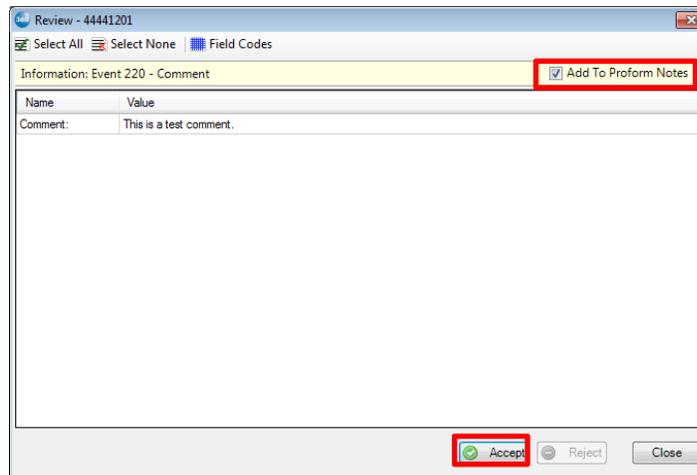
The **Review** screen will display the message, which can be added to the Impact/SQL **File Notes**. The 'Add to ProForm Notes' check box will be checked by default to add the **Comment** to the **File Notes** section within the Impact/SQL file. Click **Accept** to send the **Comments** to the Impact/SQL **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.
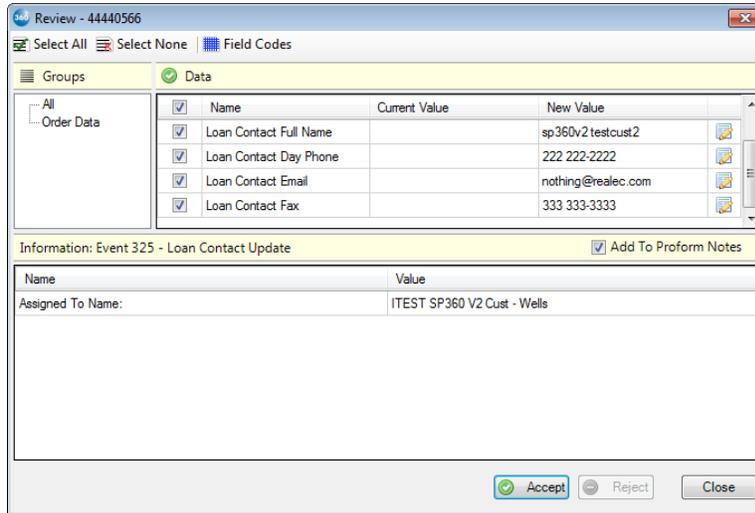
NOTE: If another user has the Impact/SQL file open, and an event is accepted that will update data for that file, the user will receive a message that the file is locked and the update cannot be completed at that time.

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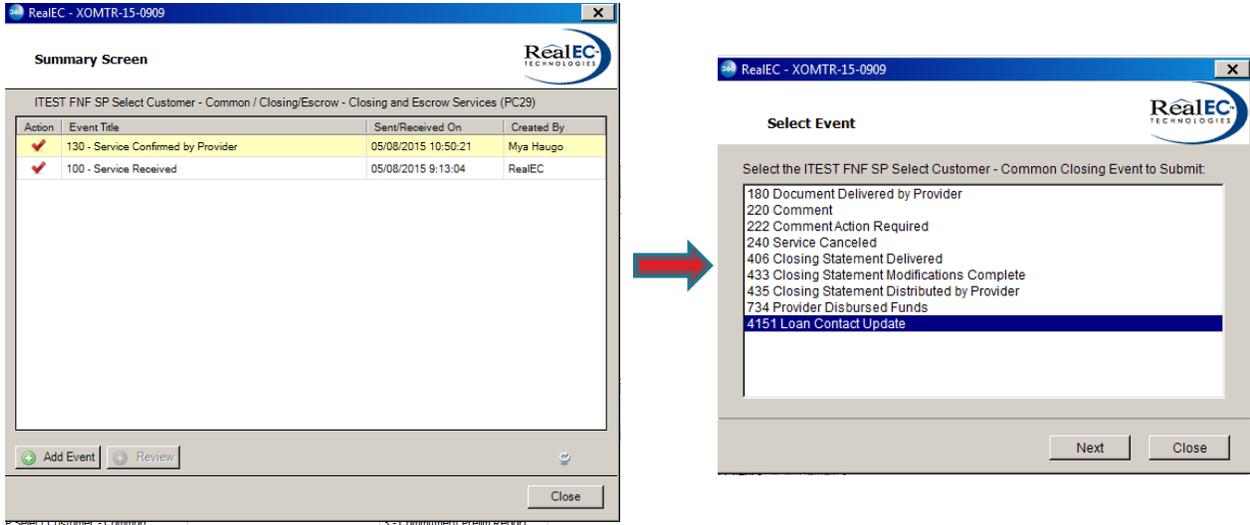
Enter or update the email address of the EO/Closer that the order is being assigned to, on the **Event Information** screen, and click on the **Next** button to add the information to the order.
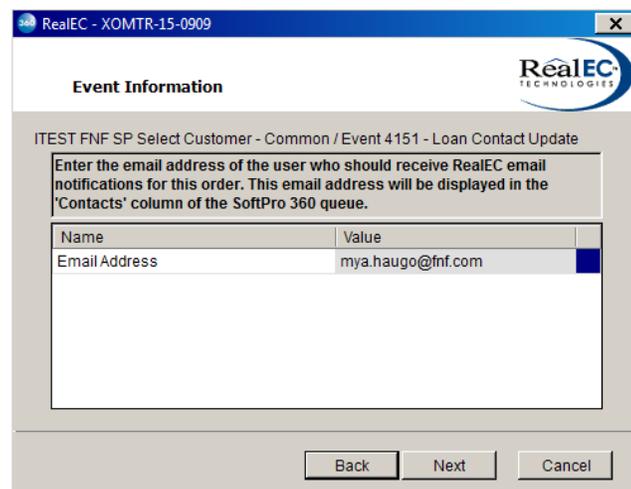
Canceling or Placing a RealEC transaction on Hold

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.
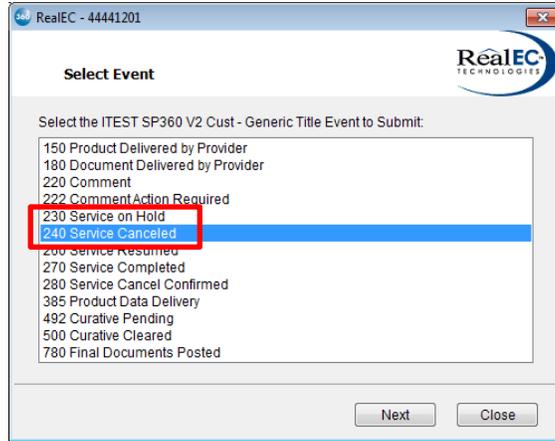
If the **240 Service Canceled** event is selected, the **Cancel Transaction** screen will ask you to confirm the transaction is to be canceled. Check the **I Agree** checkbox and click on **Next** to send the **Service Canceled Event 240** to RealEC.
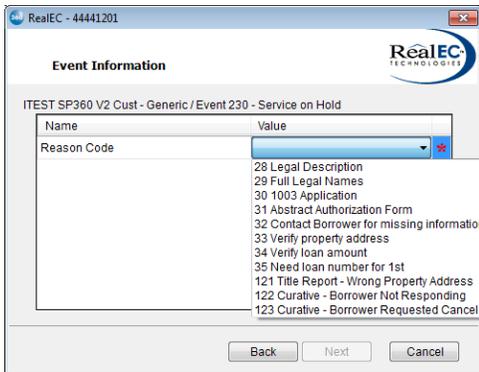
If the **Service on Hold Event 230** option is selected, the **Event Information** screen will present, on which the user should select an entry from the **Value** dropdown to pick the R**eason Code** identifying why the transaction is being placed on hold. This is a required field - noted by the red asterisk *****. Click **Next** to submit the **Service on Hold** event with its associated **Reason Code**.

The system will then present another **Event Information** screen into which the user may add any comment about the hold event.
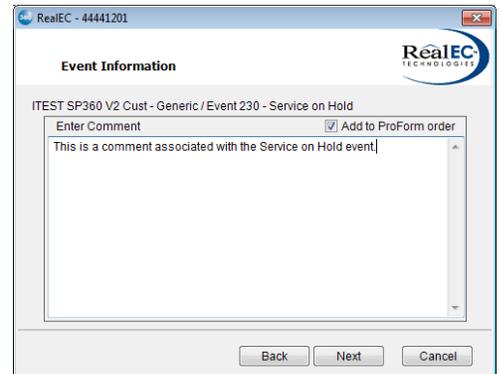
Click **Next** to submit the **Hold** event **Comment**.

The **Summary Screen** will then reflect the hold.
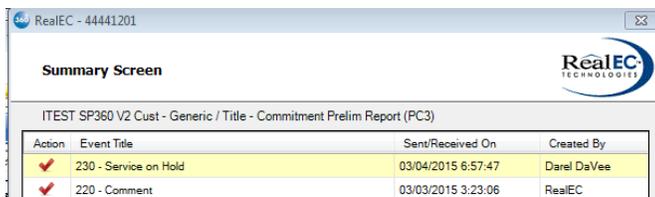
Completing a RealEC transaction

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.
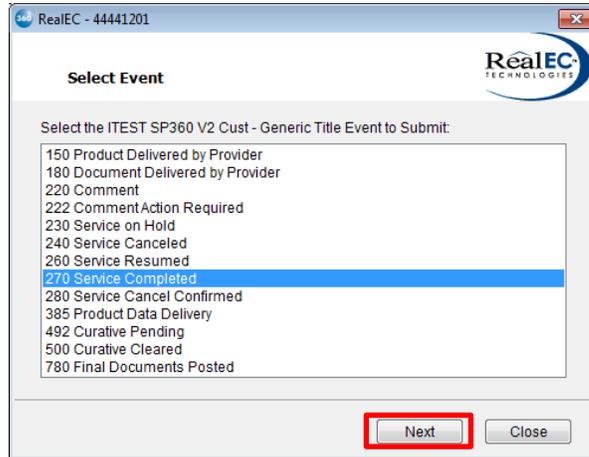
A confirmation message will be displayed. Click **Yes** to complete the order.
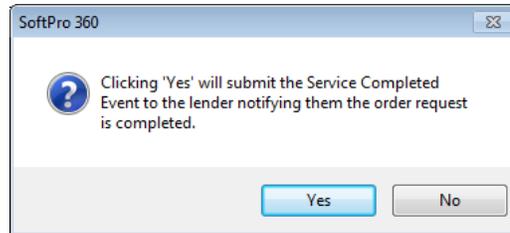
The **Status** of the transaction, on the **SoftPro 360 Widget** screen will be changed to **Completed** after a refresh of the screen.

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.