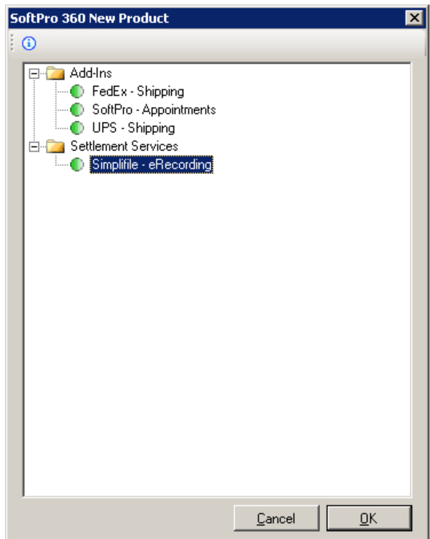
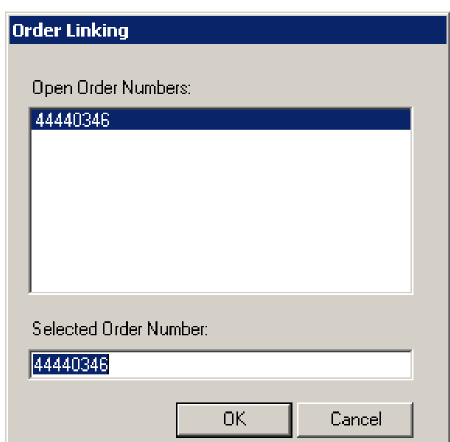
Managing Simplifile transactions in the Impact Widget SoftPro 360

Submitting a transaction to Simplifile

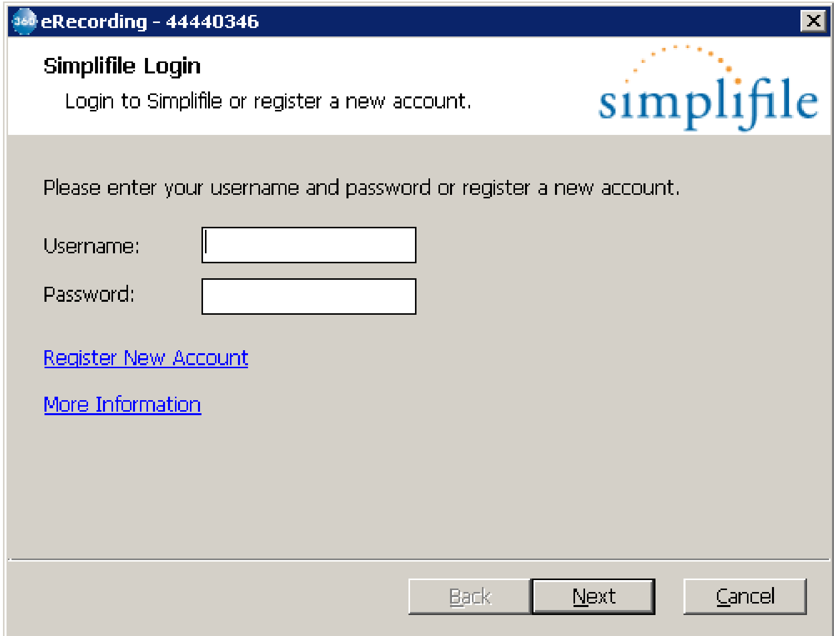
The **Simplifile** vendor is available on the SoftPro 360 widget's **New Product** listing, as shown below. Double click **Simplifile - eRecording** or highlight and click on the **OK** button to submit a transaction to Simplifile.



If you already have a file open on your Impact desktop, the file number will be listed in the **Order Linking** dialog, both in 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.

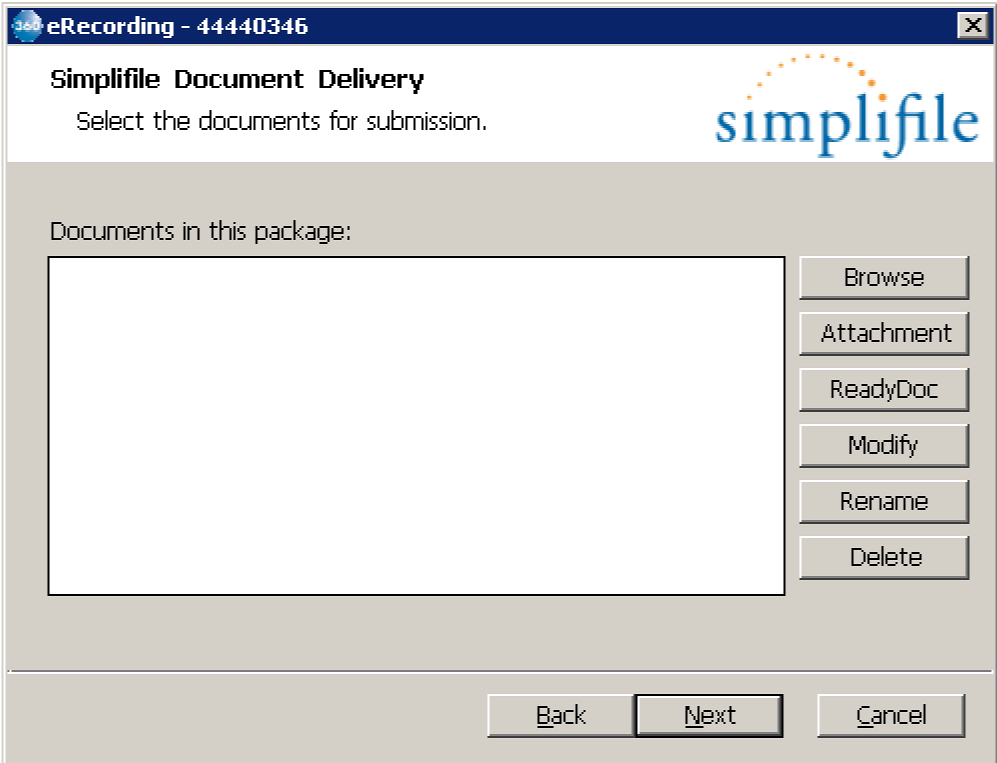


Existing users enter your **Simplifile** user name and password. New users can create a new account by clicking on **Register New Account**. Click **Next** to continue to the next screen.



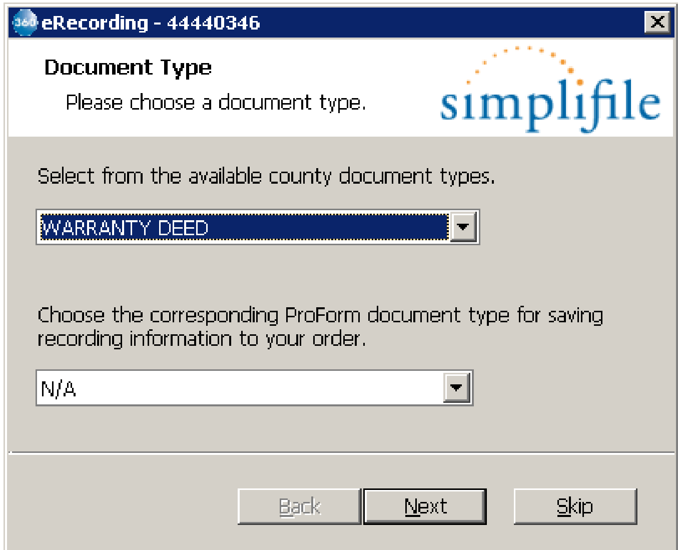
Select the county that you will be e-recording in from the drop down box. If the county does not appear in your drop down list use the **Add County** link to update your account information on **Simplifile's** website. Click **Next** to continue to the next screen.

The **Simplifile Document Delivery** dialog allows you to select the document(s) to eRecord. Click **Browse** to attach .PDF or.TIFF documents from a drive you have access to, **Attachment** to choose documents from your **Impact User Attachments** widget document list or **ReadyDoc** to attach from your Impact documents for the file, (not likely used); (and from SmartVIEW-stored documents, on FNF systems only).

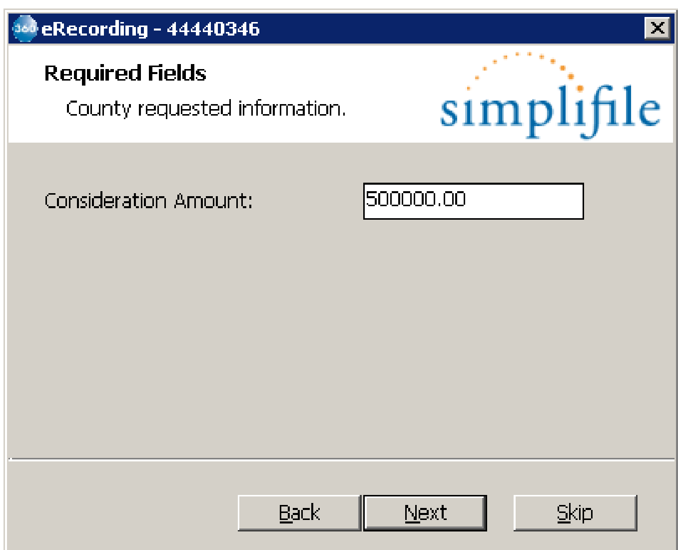


Once a document is included in the package (from the Browse, Insert command, for example), the **Document Type** screen will be superimposed on the **Simplifile Document Delivery** screen. The **Document Type** screen is described on the next page.

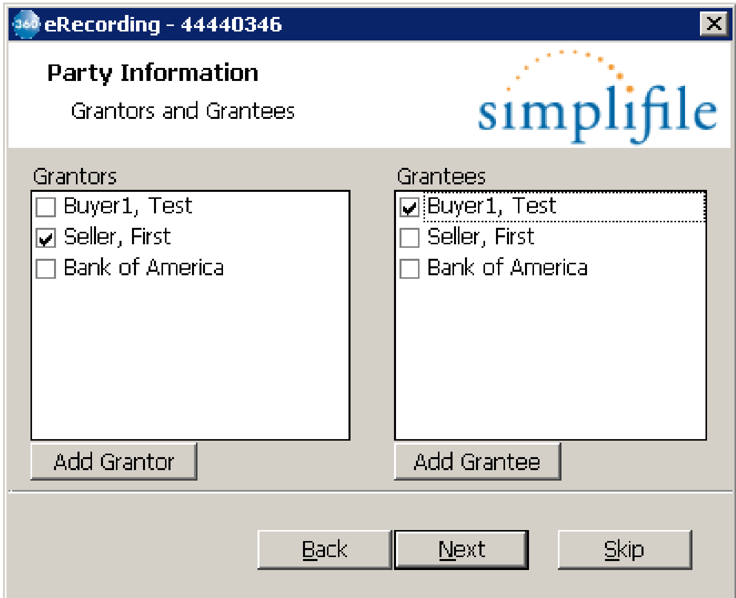
The **Document Type** screen is where you select the type of document you are recording. The **Select from the available county document type's** dropdown contains a list of available document types allowed to be e-recorded, by the County you have selected. The **Choose the Corresponding ProForm document type** field is presented but is not applicable in an Impact environment. After selecting the **Document Type**, click **Next** to continue to the next screen.



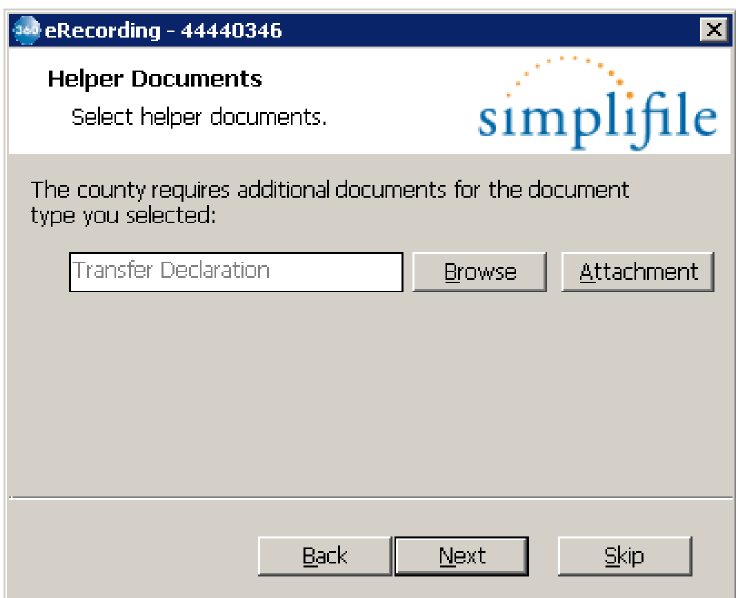
Additional screens may be presented if more information is required by the selected county in order to record the document. Verify or enter the appropriate information and click **Next** to continue to the next screen.



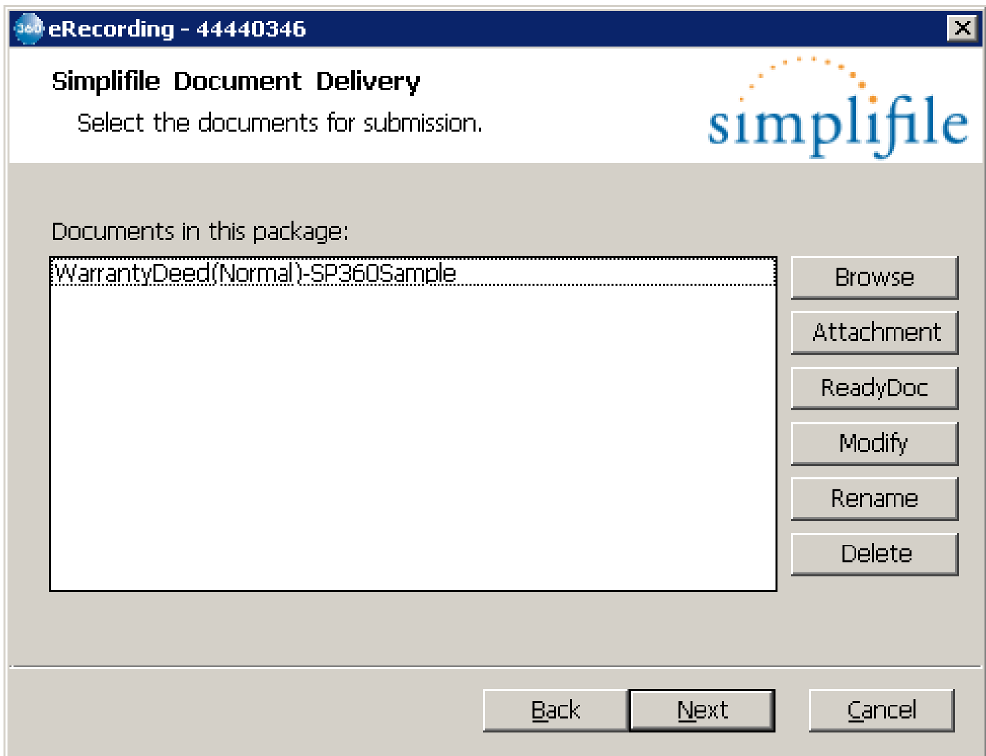
The **Party Information** screen will populate the grantors and grantees list with all buyers, sellers and lenders from your Impact order. You may choose to add additional Grantors and Grantees by clicking on the **Add Grantor** or **Add Grantee** buttons. Check off the Grantors and Grantees that pertain to the document you are currently submitting. Click **Next** to continue to the next screen.



Some counties may require additional Helper documents to be submitted. Click on **Browse** or **Attachment** to attach your helper document. Click **Next** to continue to the next screen.

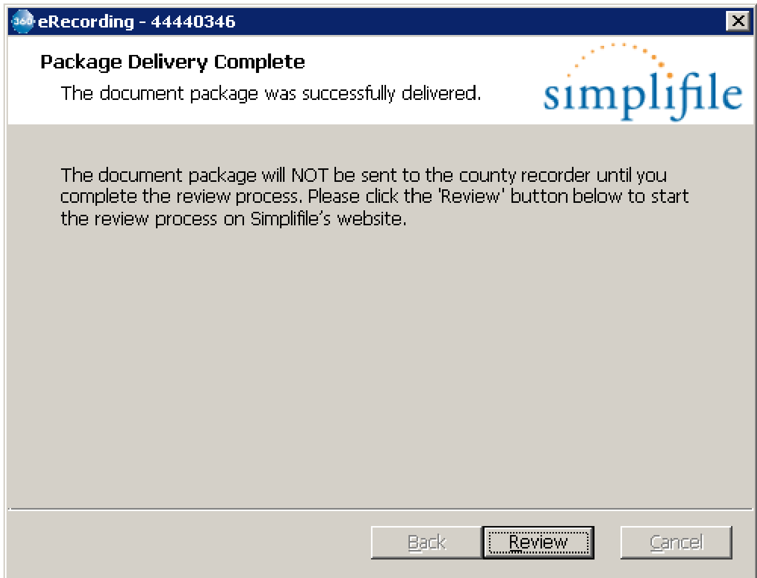


You will be returned to the **Simplifile Document Delivery** screen. You will see the name of the document(s) that you have included in your delivery package. You may repeat these steps to add additional documents to your e-recording package. When multiple documents are being submitted, they will be recorded in the order in which you have added them to this screen. However, you will have the option to reorder the documents during the review process on **Simplifile's** website. You have the ability to **Modify** any of the information you previously entered, **Rename** the document you have attached or **Delete** any of the document(s) you have attached before submitting your order to **Simplifile**. Click **Next** to continue to the next screen.



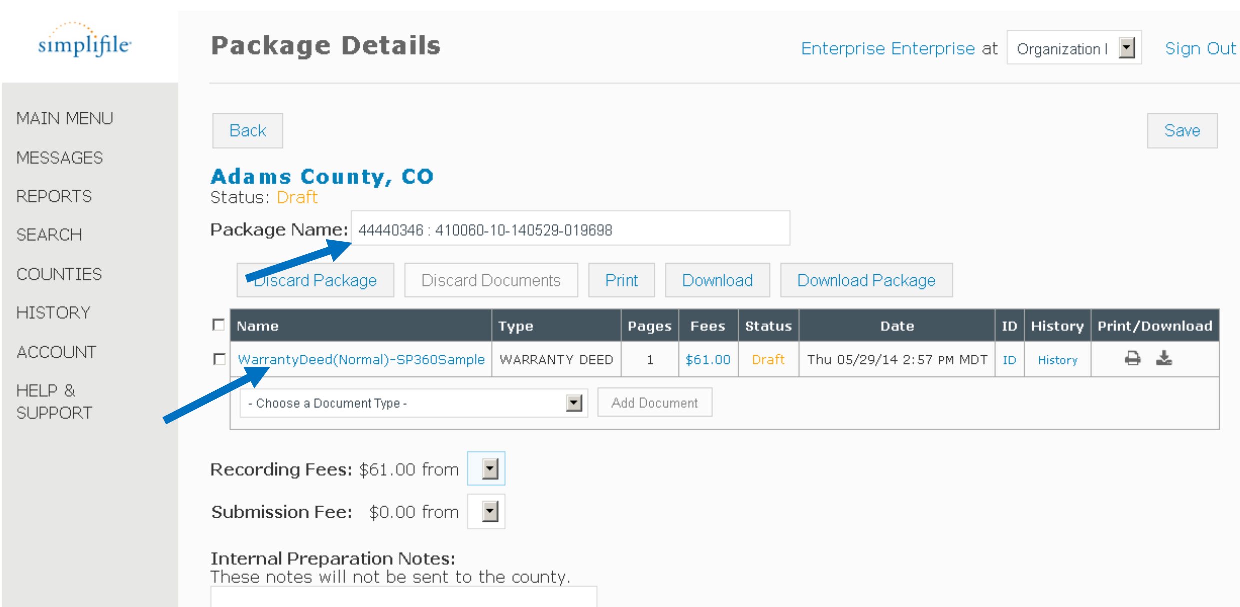
To submit your order without reviewing the documents choose **Submit this document package to the county recorder without completing the review process**. This option will be disabled if the county you are submitting to requires additional information or if you chose **Skip** on any of the previous screens. The **Review the document package on Simplifile's website** option will take you to **Simplifile's** website. Click **Submit** to continue.

The data and documents will upload to the **Simplifile** website, and you will see a progress screen as that is happening. Once the document package has been delivered to **Simplifile**, you will see the **Package Delivery Complete** screen. Click **Review** to continue, to **Simplifile's** website.

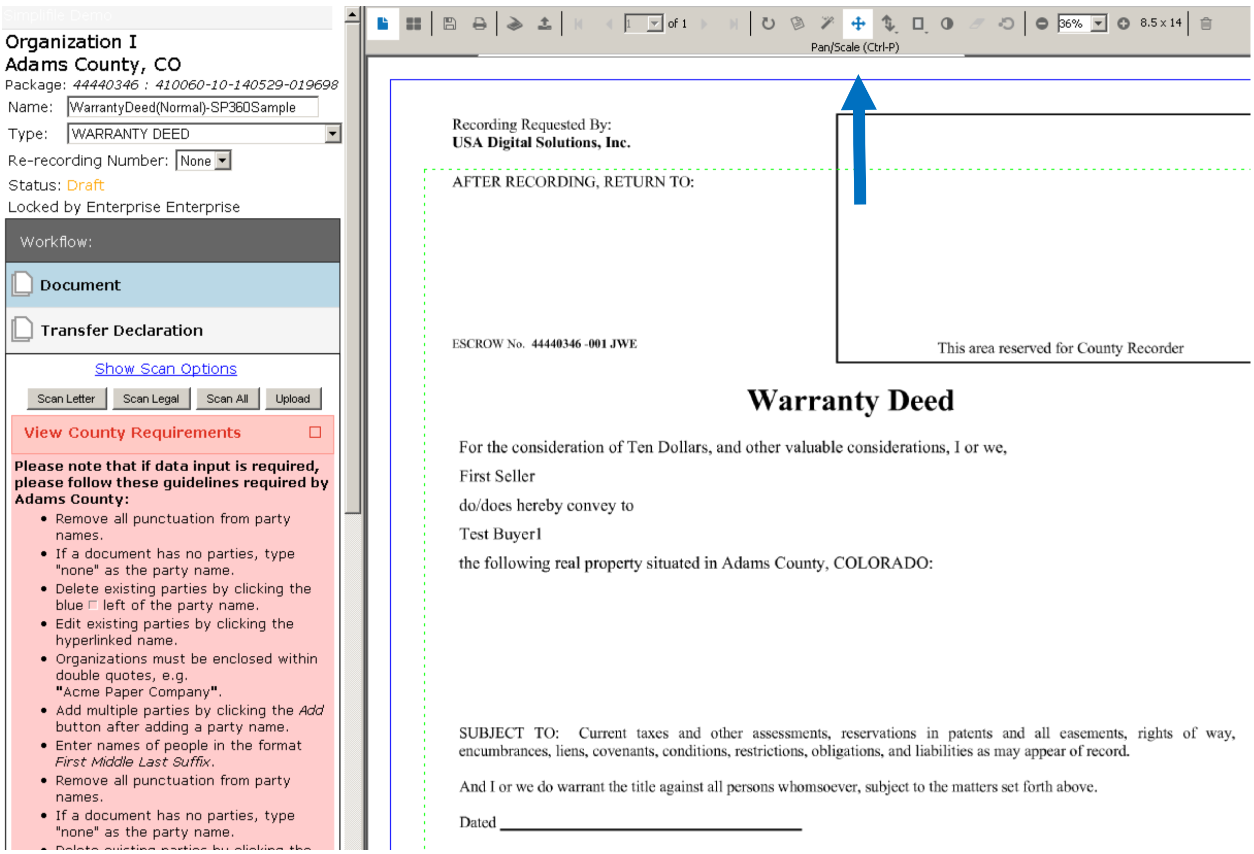


Reviewing your transaction on Simplifile's website

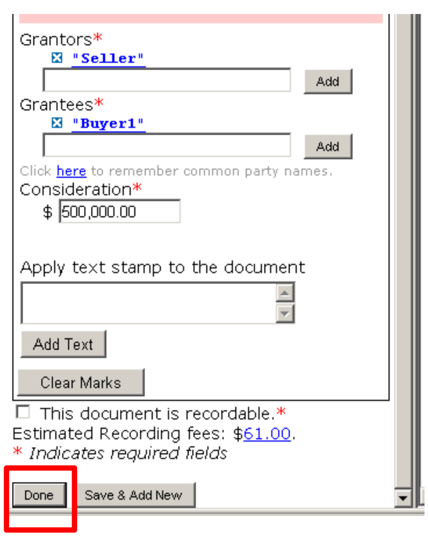
On the **Simplifile** website, the transaction name will incorporate the linked Impact order number and the 360 Transaction Number separated by a colon, in the **Package Name** field. Click on the name of your document to review and make certain it is in compliance with the county recording standards.



The document must fit within the blue lines shown in the review window to meet the county recording standards. Choose the icon to then click and drag the document to fit within the margin guidelines. Click the icon again to save changes. Enter any additional information required by the county such as number of parcels, execution dates etc. Select the '**This document is recordable'** box and click **Done**. (seen below in extension of sidebar.)

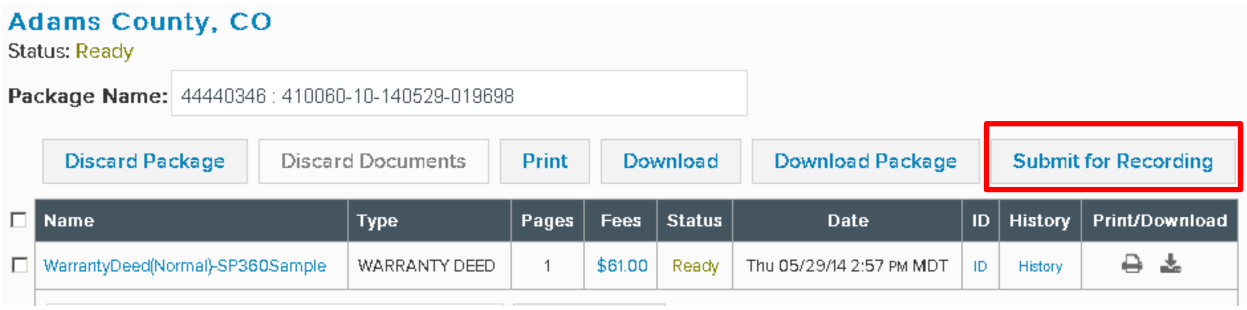


(side bar continues, scroll down to the "This document is recordable" checkbox at the end of the sidebar)

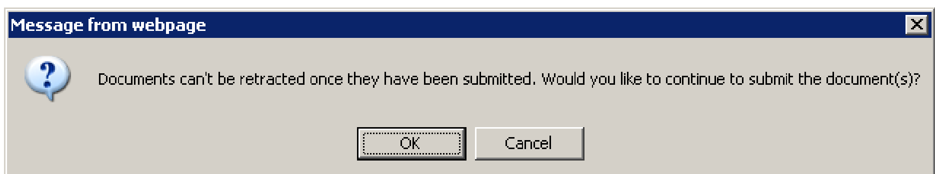


Once the **Done** button is clicked, the user is returned to the Simplifile document list web-page.

Click **Submit for Recording** to submit the document(s) to the county recorder.

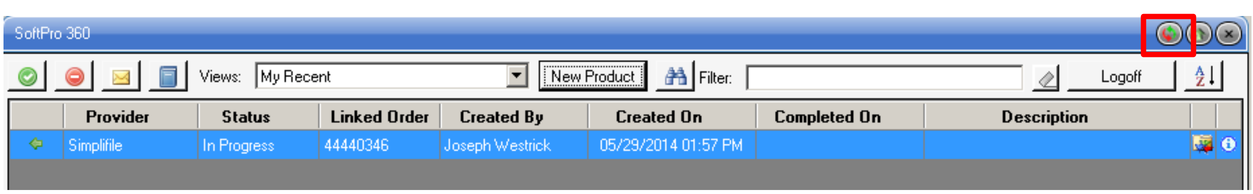


The following prompt will be presented so the user can confirm the requested action.

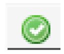


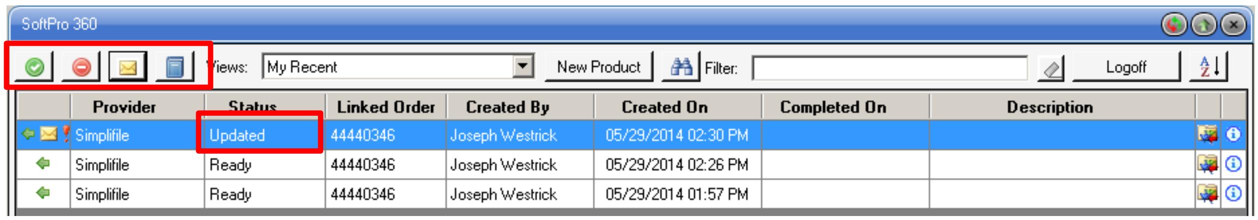
When finished, the user can Sign Out from the Simplifile site and close their browser.

Your transaction will now appear in the SoftPro 360 widget with a status of **In Progress**. You may need to click on the Refresh icon to see the new entry. That indicates the document has been received by Simplifile. When Simplifile submits to the County Recorder, and the Recorder accepts the submission, the Status will change to **Ready**.

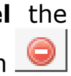


Updating your Simplifile transaction

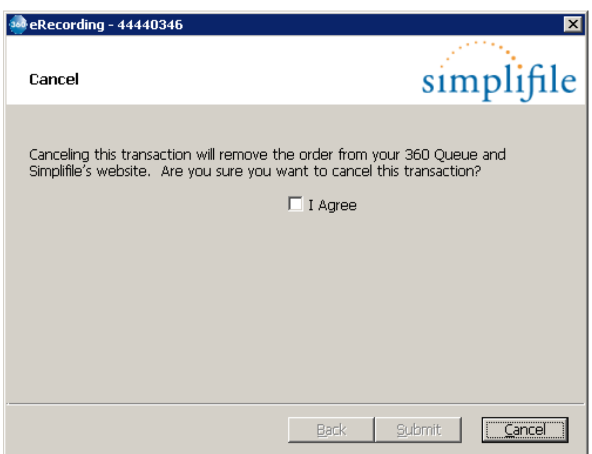
You may also see a Status of **Updated.** This indicates that Simplifile is requiring additional information in order for your document(s) to be recorded. Clicking the Log icon  will provide you with the additional information being requested. To update your transaction, double click or highlight the transaction and click the **Update** icon  . You may also update a transaction that is **In Process** if you need to add additional documents or modify the information.



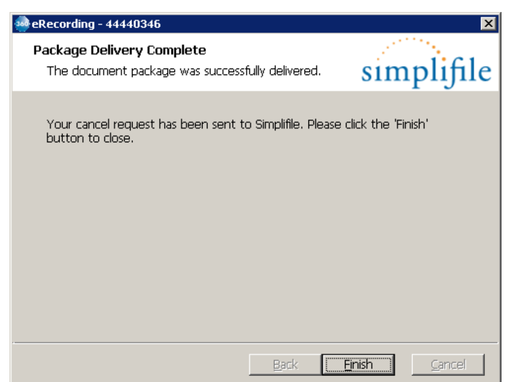
Canceling your Simplifile transaction

While your transaction status is **In Progress**, you can **Cancel** the transaction. Highlight the transaction in the SoftPro 360 widget and then click the **Cancel** icon  .

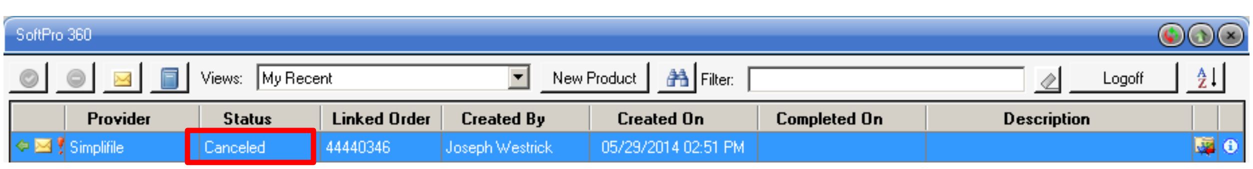
The following message will appear. Select **I Agree** and click **Submit** to continue.



The cancellation will be sent to **Simplifile** and you will receive confirmation that the transaction has been canceled. Click **Finish** to complete the cancellation.

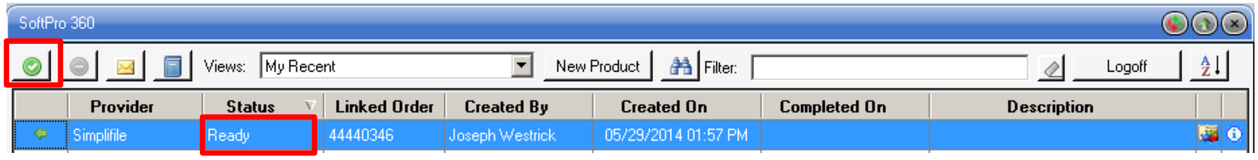


The transaction status will change to **Canceled** in the SoftPro 360 widget.

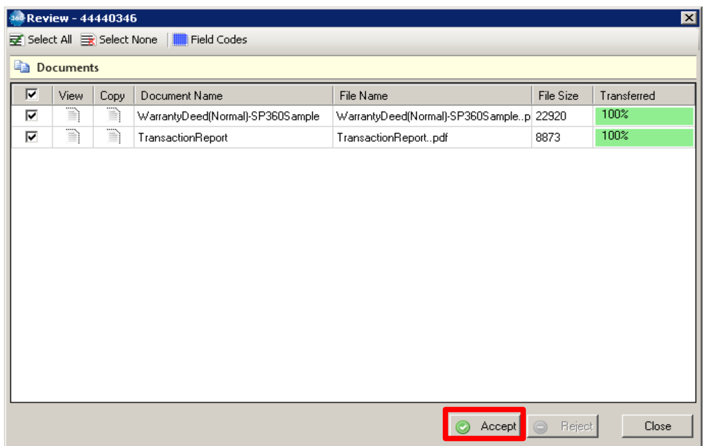


Reviewing and accepting your transaction

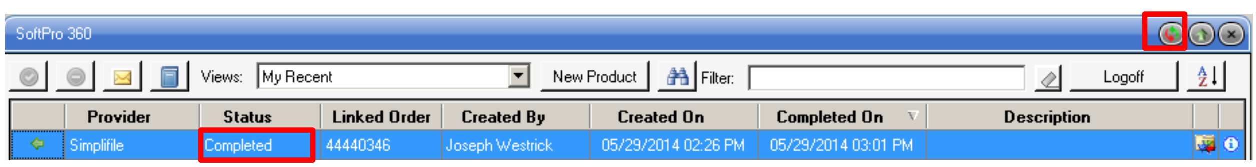
Once your transaction has been recorded by **Simplifile**, the status in the SoftPro360 widget will change to **Ready**. You may double click or highlight and click the **Review** icon to review and accept this transaction.



The system will present a window showing the documents that are ready to be accepted. Wait until the File Size field stops advancing, reflecting that the documents are fully downloaded, then click on the Accept button at the bottom of the screen.



The Status of your transaction in the SoftPro 360 widget will be updated to **Completed**. You may need to click on the Refresh icon to see the Status change promptly.



The documents will then be available in your **User Attachments** widget, where they can be printed, emailed or published (for sites with document management systems).