

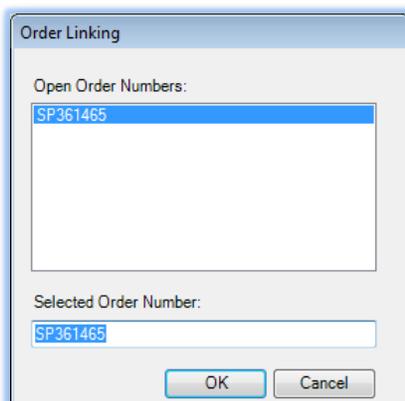
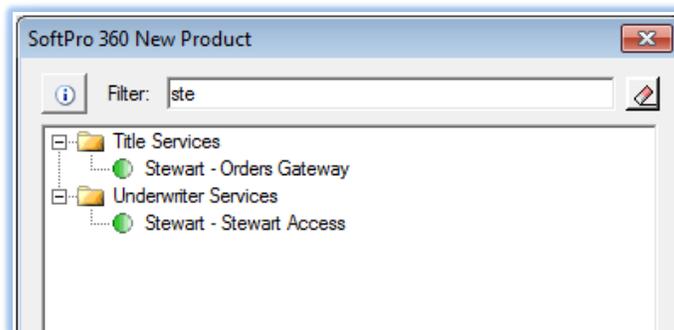
Stewart – Orders Gateway (PropertyInfo) within the Impact/SQL SoftPro 360 Widget

Getting Started – How to Submit a Transaction

Stewart – Orders Gateway (aka PropertyInfo) can be accessed via the Impact/SQL SoftPro 360 Widget. This documentation assumes that the user is familiar with the Impact/SQL SoftPro 360 widget.

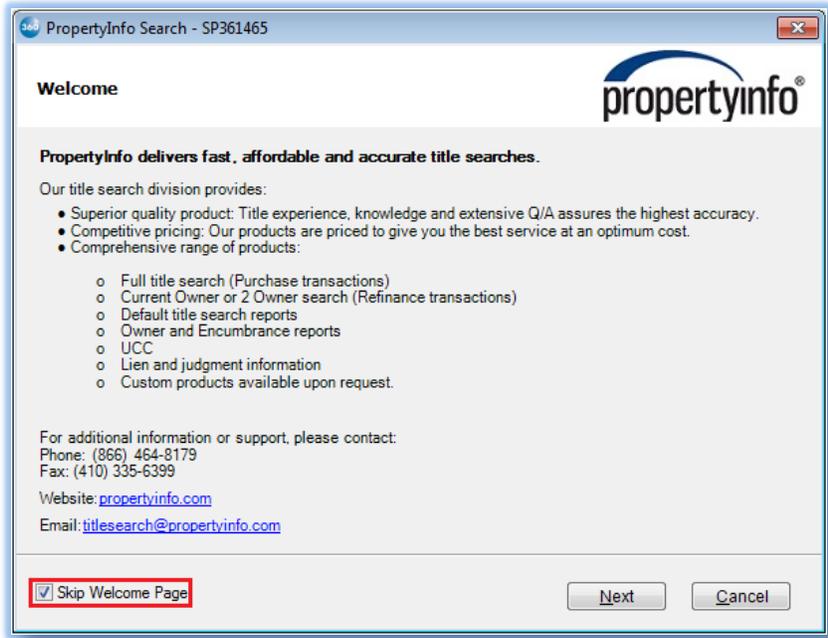
It is recommended that the file be opened on the user’s Impact/SQL desktop, but it is not mandatory.

The SoftPro 360 widget should be opened and the **New Product** button should be clicked. The **SoftPro 360 New Product** screen will present. **Stewart – Orders Gateway** can be found under **Title Services**. Depending on the number of products available it might be helpful to use the **Filter** field to narrow down the listing to locate the **Stewart – Orders Gateway (aka PropertyInfo)** product. In the sample below, “ste” was entered in the **Filter** field, thus narrowing the selection list to only the products shown. To select the product, simply double-click on “**Stewart – Orders Gateway**” or alternatively, highlight “**Stewart – Orders Gateway**” and then click on the **OK** button.

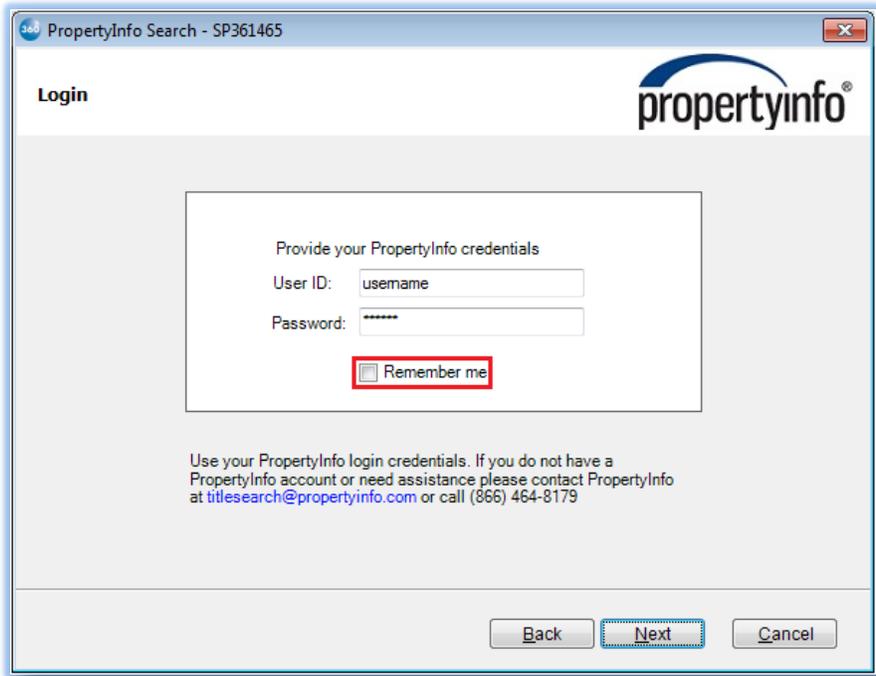


Assuming that the file for which rates are to be requested was open on the desktop, the **Order Linking** screen will present with the open file’s number pre-loaded on the screen. If the file is not opened on the desktop, the user should enter the file number in the **Selected Order Number** field. Once the file number is confirmed to be correct, click on the **OK** button or hit the **Enter** key to continue.

The **Welcome** screen provides information about **PropertyInfo**. The user may choose to skip this screen in the future by clicking on the **Skip Welcome Page** checkbox to select it. Click **Next** to continue.



The user should enter their **PropertyInfo User ID** and **Password** and click **Next** to continue. Checking the **Remember Me** checkbox will skip the login screen on subsequent uses.



The **Data Review** screen allows the **County**, **Transaction Type** and **Due Date** to be selected. The **County** field will attempt to validate the county from the Impact/SQL file. If a match cannot be made, then a **County** will need to be selected from the drop down. **Due Date** can be selected by clicking on the drop down calendar. Once all information is selected, click **Next** to continue.

PropertyInfo Search - SP361465

Data review

The following information will be sent with the order

County: Maricopa

Transaction Type: Resale - New Loan

Due Date: 02/01/2017

[File Information](#) Back Next Cancel

NOTE: File information submitted to **PropertyInfo** can be viewed by clicking the **File Information** hyperlink.

PropertyInfo Search - SP361465

Data review

The following information will be sent with the order

County: Maricopa

Transaction Type: Resale - New Loan

Due Date: 02/01/2017

[File Information](#)

PropertyInfo Search - SP361465

File Information

The following information will be sent with your order

Property Type	Single Family Dwelling		
Address	456 Somewhere Ave		
City/ State/ Zip	Phoenix	AZ	85029
Sales Price	180000.00		
Loan 1	Loan Amount 150000.00		
Lender Name	Bank of the West		
APN/ Parcel ID	123-2-45-678		
Subdivision	Happy Acres		
Lot	154		
Unit			
Municipality	Phoenix		

Note: Edits made here will not update your ProForm Order

OK Cancel

PropertyInfo Search - SP361465

File Information 

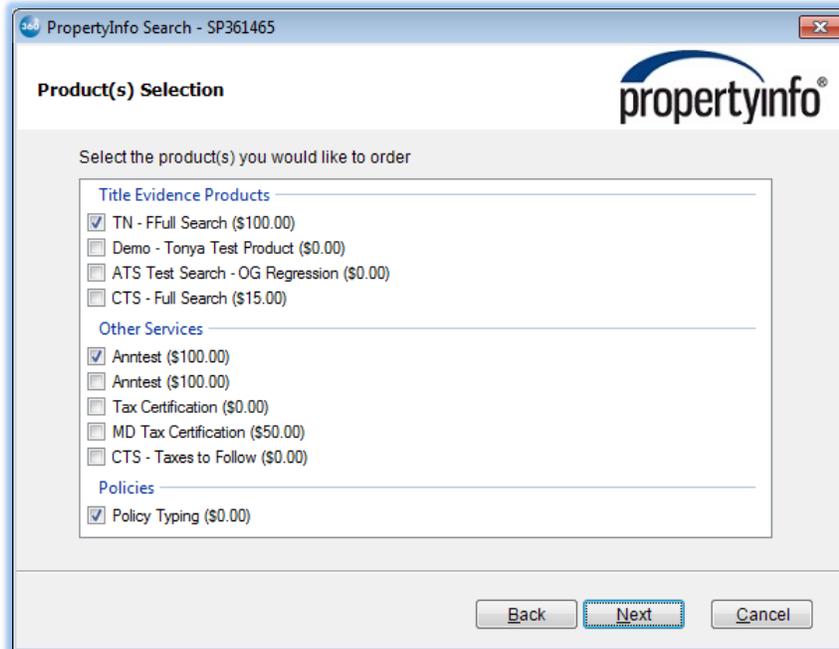
The following information will be sent with your order

Property Type	Single Family Dwelling		
Address	456	Somewhere Ave	
City/ State/ Zip	Phoenix	AZ	85029
Sales Price	180000.00		
Loan 1			
Loan Amount	150000.00		
Lender Name	Bank of the West		
APN/ Parcel ID	123-2-45-678		
Subdivision	Happy Acres		
Lot	154		
Unit			
Municipality	Phoenix		

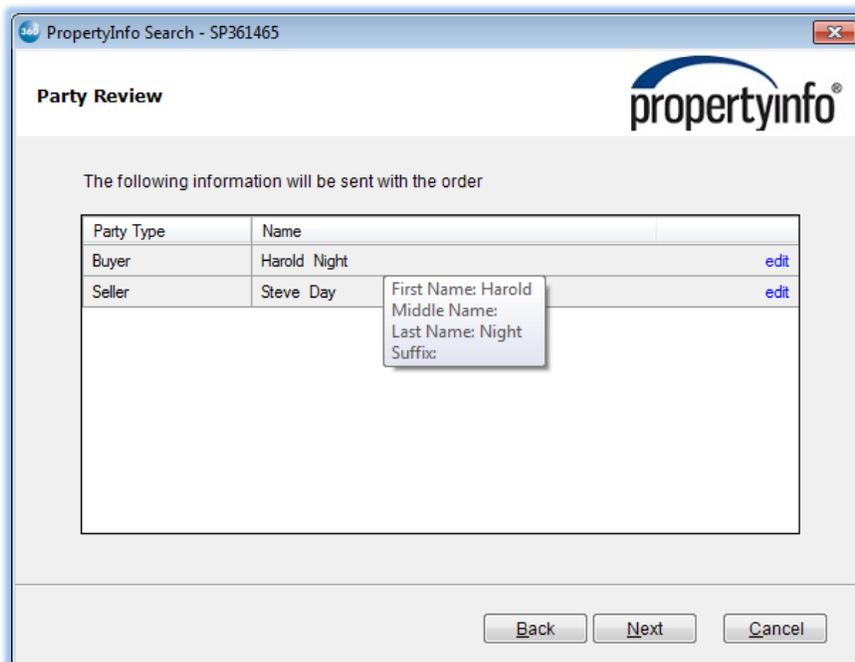
Note: Edits made here will not update your ProForm Order

The Impact/SQL file information will be displayed on the **File Information** screen. The user may add, edit or update the values on the screen as required. Clicking on the **OK** button will return the user to the **Data Review** screen. **Please note that edits made on the File Information screen will NOT update the Impact/SQL file.**

Click **Next** on the **Data Review** screen to continue to the **Product(s) Selection** screen. This screen will display the available products based upon the values previously selected on the **Data Review** screen.



The user may select one or multiple products to order through **PropertyInfo**. However, only one product from each category (**Title Evidence Products**, **Other Services** or **Policies**) may be ordered. At least one product must be selected in order to proceed to the next screen. Click **Next** to continue to the **Party Review** screen seen here.



The **Party Review** screen presents the information for the relevant parties from the Impact/SQL file that will be sent to **PropertyInfo**. The user may place the cursor over the name for the Tool Tip to show the name as it appears (First/Middle/Last/Suffix). To edit a name, the user should click the blue **Edit** link to the right of the name that is to be edited. This will display the **Party Name Dialogue** where the data can be changed.

PropertyInfo Search - SP361465

Party Name Detail

propertyinfo®

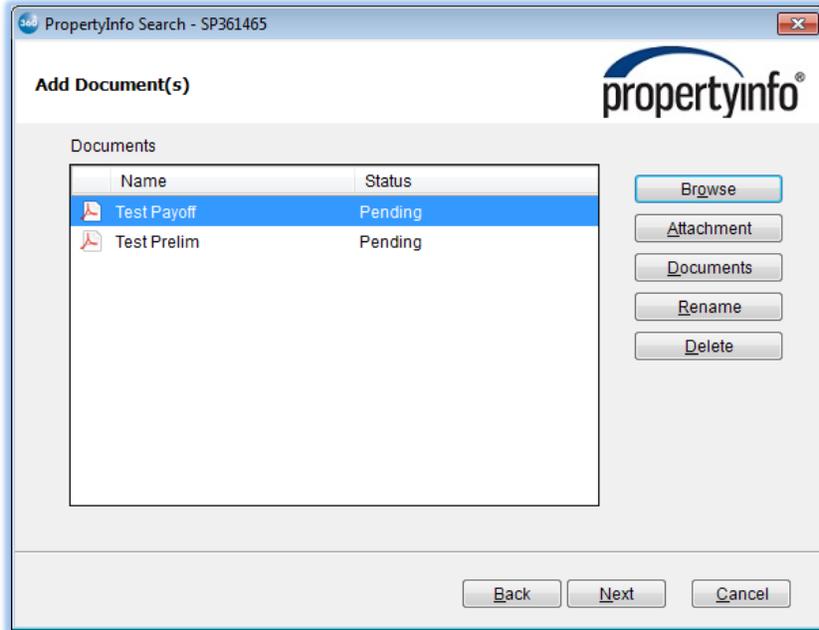
First Name	Middle Name	Last Name	Suffix
<input type="text" value="Harold"/>	<input type="text"/>	<input type="text" value="Night"/>	<input type="text"/>

Note: Edits made here will not update your ProForm Order

After any edits have been made, the user should click on the **OK** button to return to the **Party Review** screen. Clicking on the **Cancel** button will not save any edits that may have been done.

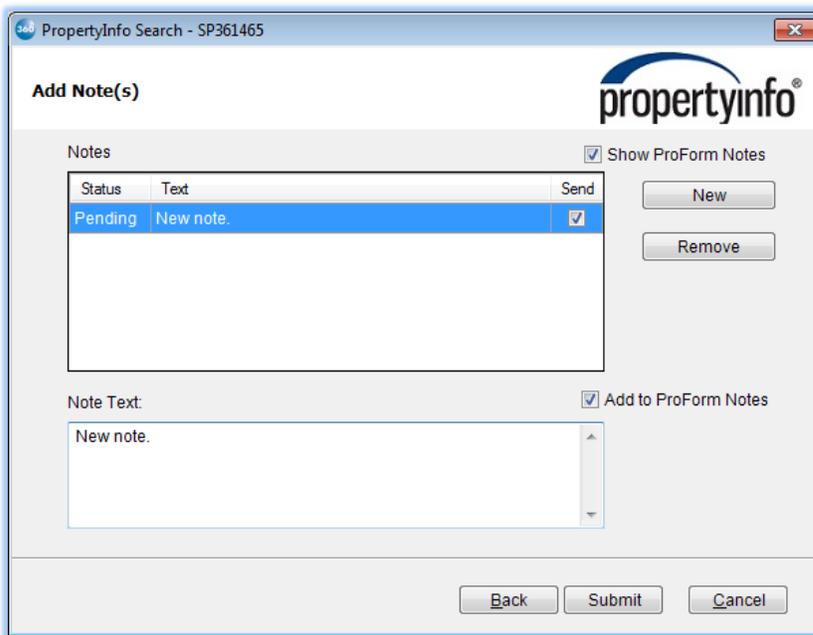
NOTE: Edits made on the Party Name Detail screen will NOT update the Impact/SQL file.

The user should then click **Next** to continue.



The **Add Document(s)** screen allows users to add documents to be submitted to **PropertyInfo**. Click the **Browse** button to browse out to a file/folder location. Click the **Attachment** button to select a document from the **User Attachments** widget. Click the **ReadyDoc** button to open an Impact/SQL document or smartView-stored (FNF sites only) document. The **Rename** button will rename the highlighted document while the **Delete** button will delete the highlighted document from the list. Once all desired documents have

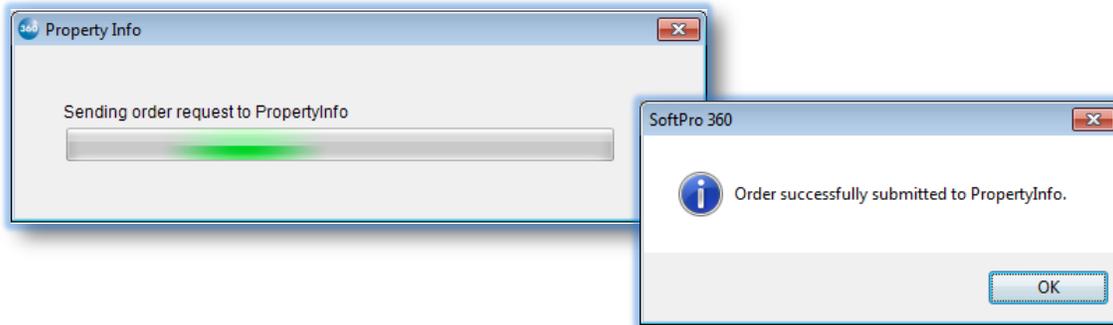
been added to the list, click **Next** to continue.



If desired, the user may add notes relating to the transaction by clicking the **New** button on the **Add Note(s)** screen. Enter the new note by clicking in the **Note Text** box and typing the note. The new note will be added to the **Notes** list.

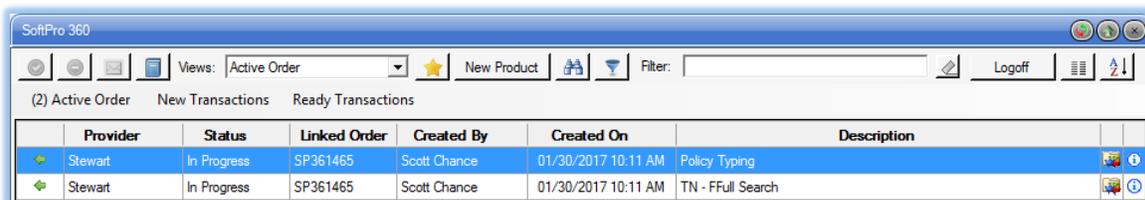
By default, the notes entered in the Impact/SQL file will also be displayed in the **Notes** list. The Impact/SQL notes may be hidden in the **Notes** list by unchecking the **Show ProForm Notes** checkbox.

The user may select the notes to be sent to **PropertyInfo** by checking the box in the **Send** column. Any new note added on this screen will by default be saved to Impact/SQL file notes unless the **Add to ProForm Notes** checkbox is unchecked. Click **Submit** to order the products from **PropertyInfo**.



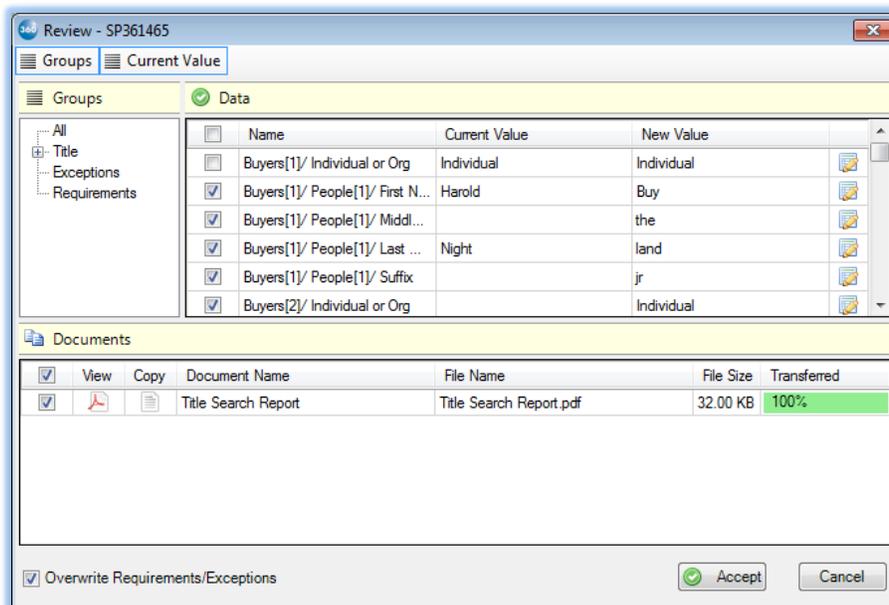
SoftPro 360 Queue

The transaction will appear in the SoftPro 360 queue with a status of **In Progress**. If the user has ordered multiple products, each product will have a unique transaction number linked to the same order and the **PropertyInfo** product name will be displayed in the description column.



How to Review a Transaction

Once **PropertyInfo** has completed the transaction, the status will change to **Ready** in the SoftPro 360 queue. The user should open the item to view the **Review** screen.

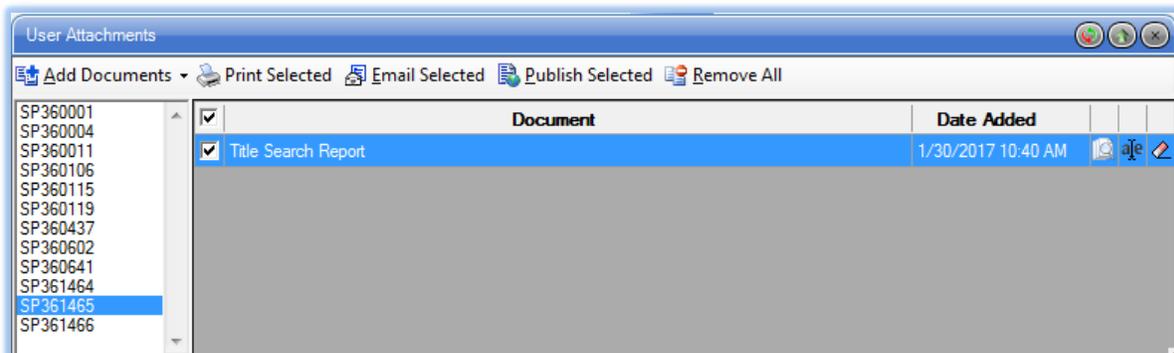


PropertyInfo will return data and documents which will be visible in the **Review** screen. The **All** label expands to display the Title, Exceptions, Requirements and Notes. The **Title** label expands to show all the title data the user can accept into the file. By default, the checkbox for any title data that has been edited, added or deleted in a particular field by **PropertyInfo** will be checked to alert the user of the change. Any field that the user does not wish to accept can be unchecked before clicking the **Accept** button. The existing Requirements and Exceptions in the Impact/SQL file can be overwritten by checking the **Overwrite Requirements/Exceptions** checkbox. By unchecking the box, the new Requirements and Exceptions displayed on the **Review** screen will added to the existing Requirements and Exceptions in the Impact/SQL file.

The **Review** screen also allows documents to be viewed by clicking the  **View** icon. Documents may be copied to the clipboard by clicking the  **Copy** icon. Click **Accept** to add the data and document(s) to the linked Impact/SQL file. Click **Cancel** to close the **Review** screen without accepting any data or documents.

NOTE: If the ordered product is one that does not require data or documents returned, the user will receive a blank **Review** screen.

Once the remits are accepted, the documents will be available in the user's **User Attachments** widget. From there, they may be printed, emailed or published to a document retention system.

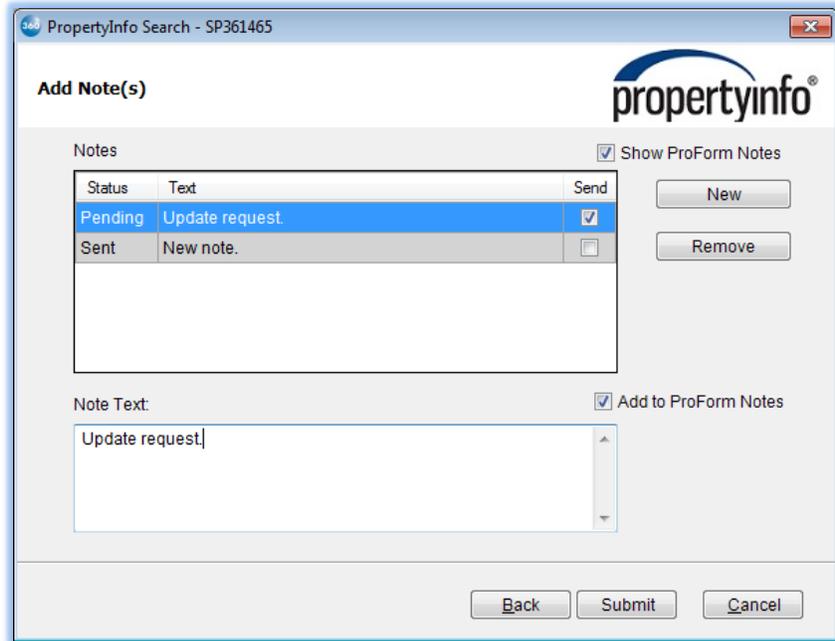


For databases that utilize a document retention system, users will typically receive a pop-up screen where they may send the document(s) directly to that system.

Request an Update

After clicking **Accept**, the transaction will update to an **Accepted** status in the SoftPro 360 queue. The user may trigger the **Update** functionality only when the transaction is in an **Accepted** status. This is done by either double-clicking on the transaction or highlighting it and clicking the  **Next Step** icon. The user will be directed to the **Update** screen where they will need to enter their **PropertyInfo** credentials unless the **Remember Me** checkbox was previously selected.

The user may send comments/requests for the updates by clicking on the **New** button on the **Add Note(s)** screen and entering the comment or request in the **Note Text** field. Click **Submit** to order the updates from **PropertyInfo**.



Status	Text	Send
Pending	Update request.	<input checked="" type="checkbox"/>
Sent	New note.	<input type="checkbox"/>

Once the update is submitted to **PropertyInfo**, the transaction status changes back to **In Progress**. Incoming updates will change the status to **Ready**, then once accepted, to **Accepted**. Updates can be sent up to one year from the original order date, at which time the transaction status will be set as **Completed** and no further updates or remits may be requested.