

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.



Order Linking	
Open Order Numbers:	
SP361465	
Selected Order Number: SP361465	
OK Cancel	

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.

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 Full title search (Purchase transactions) Current Owner or 2 Owner search (Refinance transactions) Default title search reports Owner and Encumbrance reports UCC Lien and judgment information Custom products available upon request. For additional information or support, please contact: Phone: (866) 464-8179 Fax: (410) 335-6399 Website: propertyinfo.com Email: <u>titlesearch@propertyinfo.com</u> Welsome Page Next Cancel	 Superior quality product: Title experience, knowledge and extensive Q/A assu Competitive pricing: Our products are priced to give you the best service at ar Comprehensive range of products: 	res the highest accuracy. optimum cost.
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Website: property info.com Email: titlesearch@property info.com Image: Skip Welcome Page Next Cancel	For additional information or support, please contact: Phone: (866) 464-8179 Fax: (410) 335-6399	
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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.

🥹 PropertyInfo Sear	ch - SP361465	•
Login		propertyinfo
	Provide your PropertyInfo credentials User ID: usemame Password: Remember me Use your PropertyInfo login credentials. If you do not have a PropertyInfo account or need assistance please contact PropertyInfo account or need assistance please contact Propert at titlesearch@propertyInfo.com or call (866) 464-8179	ertyInfo
	<u>B</u> ack	Next <u>C</u> ancel

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 - Si	9361465	E
Data review		propertyinfo
The following info	rmation 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 - SF	2361465		[×				
Data review		pro	pertyinf	o"				
The following info	rmation will be sent with the o	rder						
County:	Maricopa		•	- 1				
Transaction Type:	Resale - New Loan		•	- 1				
Due Date:	02/01/2017			- 1				
		🥹 PropertyInfo Search -	SP361465	-				×
		File Information				p	roperty	vinfo®
		The following inform	mation will be sent w	vith your o	order	•		
		Property Type	Single Family Dwe	elling			-	•
File Information		Address	456	Sor	mewhere 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	Dhamain					-
		municipality	ribenix					*
		Note: Edits made h	nere will not update	your Prof	orm Order			
						0	К <u>С</u> а	ancel

le Information			pro	pertyinfo
The following infor	mation will be sen	t with your order		_
Property Type	Single Family D	welling		▼ ^
Address	456	Somewhere /	lve	
City/ State/ Zip	Phoenix	AZ	85029	
Sales Price	180000.00			=
Loan 1				•
Loan Amount	150000.00			
Lender Name	Bank of the We	est		
APN/ Parcel ID	123-2-45-678			
Subdivision	Happy Acres			
Lot	154			
Unit				
Municipality	Phoenix			Ŧ
Note: Edits made	here will not updat	e your ProForm Orde	er	

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. <u>Please note that edits made on the File Information screen will NOT update the Impact/SQL file.</u>

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.

😔 PropertyInfo Search - SP361465	—
Product(s) Selection	propertyinfo
Select the product(s) you would like to order	
Title Evidence Products	
TN - FFull Search (\$100.00)	
Demo - Tonya Test Product (\$0.00)	
ATS Test Search - OG Regression (\$0.00)	
CTS - Full Search (\$15.00)	
Other Services	
Anntest (\$100.00)	
Anntest (\$100.00)	
Tax Certification (\$0.00)	
MD Tax Certification (\$50.00)	
CIS-Taxes to Follow (\$0.00)	
Policies	
Policy Typing (\$0.00)	
	Back Next Cancel

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.

🕹 Prop	ertyInfo Search - S	P361465		—
Part	y Review			propertyinfo
	The following info	ormation will be sen	t with the order	
	Party Type	Name		
	Buyer	Harold Night		edit
			Middle Name: Last Name: Night Suffix:	
			Back	Next Cancel

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 Se	arch - SP361465						
Party Name De	etail	propert	yinfo°				
First Name Harold	Middle Name	Last Name Night	Suffix				
Note: Edits made here will not update your ProForm Order							
		<u>o</u> k <u>(</u>	<u>ancel</u>				

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.

🥹 PropertyInfo Search - SP3614	65	EX
Add Document(s)		propertyinfo
Documents		
Name	Status	Browse
Est Payoff	Pending Pending	<u>Attachment</u> <u>D</u> ocuments <u>R</u> ename <u>D</u> elete
	<u>B</u> ack	<u>N</u> ext <u>C</u> ancel

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 onlv) 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.

🥶 PropertyInfo Search - SP361465	-X-
Add Note(s)	propertyinfo
Notes	Show ProForm Notes
Status Text Pending New note.	Send New Remove
Note Text: New note.	Add to ProForm Notes
	Back Submit Cancel

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.

SoftPro 360							
💿 💿 🔄 📄 Views: Active Order 🔽 🚖 New Product 🎮 🍷 Filter:							
tive Order New	Transactions	Ready Transactio	ons				
Provider	Status	Linked Order	Created By	Created On		Description	
Stewart	In Progress	SP361465	Scott Chance	01/30/2017 10:11 AM	Policy Typing		🐺 O .
Stewart	In Progress	SP361465	Scott Chance	01/30/2017 10:11 AM	TN - FFull Search		🥥
(360 Description (Constraint) tive Order New Provider Stewart Stewart	360 Image: Stewart Image: Stewart Image: Stewart Image: Stewart	360 Image: Status Image: Status Image: Status Linked Order Stewart In Progress Stewart In Progress SP361465	360 Image: Status Status Status Image: Status Image: Status Image: Status Image: Status Status Status Image: Status Image: Status Image: Status Image: Status Status Image: Status Status Image: Status Im	S60 Image: Second sec	360 Image: Status Stewart Image: Image: Status Stewart Image: Status Stewart Image: Status Stewart Image: Status Stewart Image: Status Status <th>Stewart In Progress SP361465 Scott Chance 01/30/2017 10:11 AM Tork Full Search</th>	Stewart In Progress SP361465 Scott Chance 01/30/2017 10:11 AM Tork Full Search

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.

😔 Review - SP361465 🛛 💽									
Groups Current Value									
📑 Groups 💿 Data									
All	Name	Name Current Value New Va		-					
Exceptions	Buyers[1]/ Individual or Org	Individual	Individual						
Requirements	Buyers[1]/ People[1]/ First N.	. Harold	Buy						
	Buyers[1]/ People[1]/ Middl		the						
	Buyers[1]/ People[1]/ Last	Night	land						
	Buyers[1]/ People[1]/ Suffix		jr						
	Buyers[2]/ Individual or Org		Individual	- 🧊					
Documents									
View Copy	Document Name	File Name	File Size Transf	erred					
	Ittle Search Report		32.00 KB 100%						
Overwrite Requirements/Exceptions Cancel Cancel									

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 in the Impact/SQL file.

The **Review** screen also allows documents to be viewed by clicking the \checkmark **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.

User Attachments								
🔢 Add Documents 🔻 🖕 Print Selected 📓 Email Selected 🖺 Publish Selected 😭 Remove All								
SP360001 SP360004 SP360011 SP360106 SP360115 SP360115 SP360119 CP360127	Document Document Title Search Report	Date Added 1/30/2017 10:40 AM	<u>i i i i i i i i i i i i i i i i i i i </u>					
SP360437 SP360602 SP360641 SP361464 SP361465 SP361466								

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 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.

PropertyInfo Search - SP361465				—		
Add Note(s)			propertyinfo			
	Notes				V S	how ProForm Notes
	Status Pending	Text Update request.			Send V	New
	Sent	New note.				Remove
	Note Text:					dd to ProForm Notes
	Update re	equest.			*	
_				<u>B</u> ack	Sub	mit <u>C</u> ancel

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.