

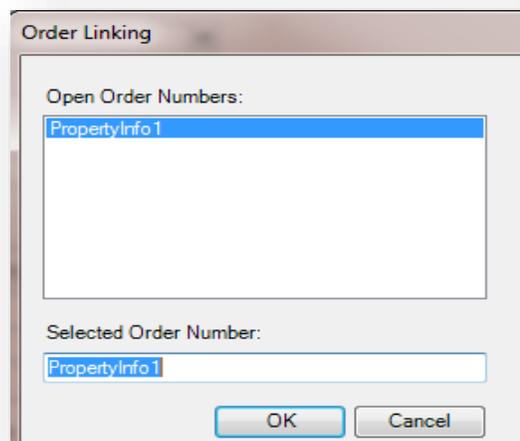
Managing Stewart – Orders Gateway Transactions in SoftPro 360

How to Submit a Transaction

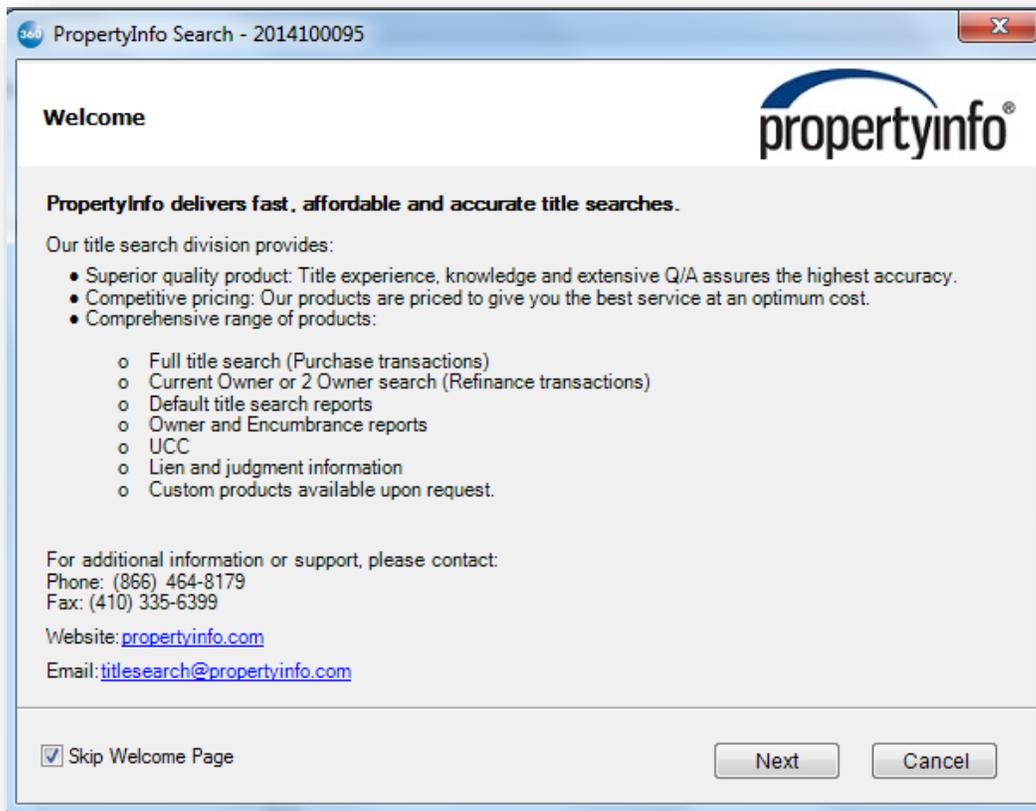
Stewart – Orders Gateway (PropertyInfo) can be found in the SoftPro 360 Products menu under Title Services.



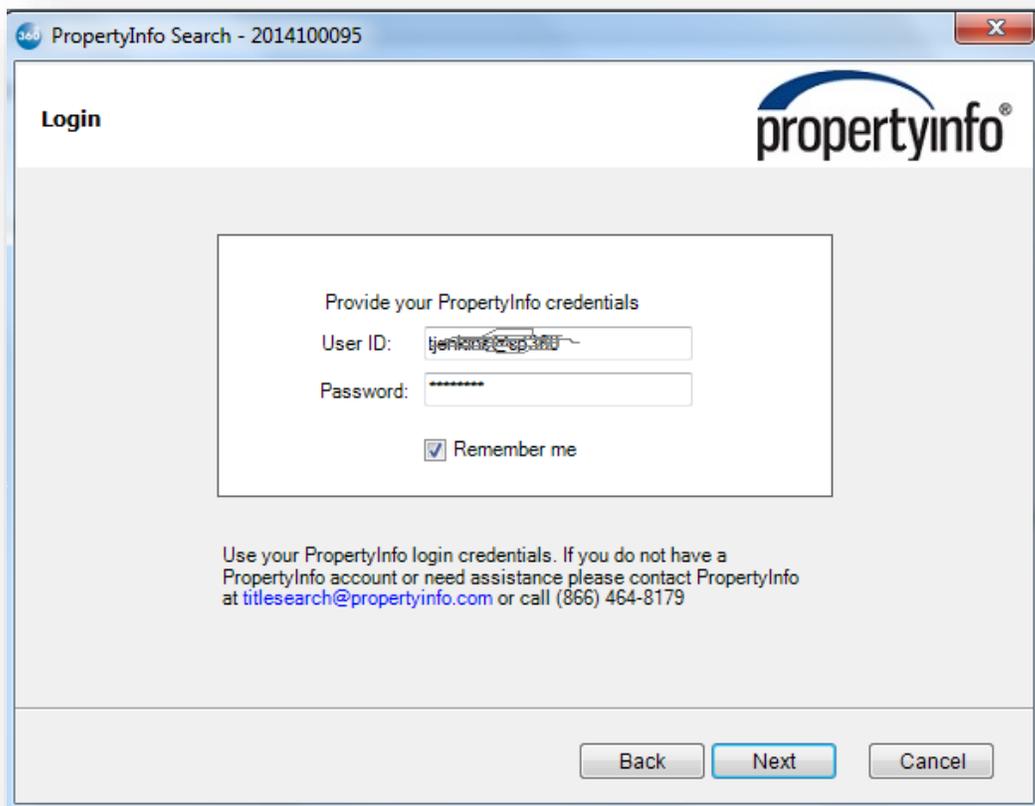
If a ProForm order is already open, it will be listed in the Order Linking dialog. The active order will be highlighted and entered in the Selected Order Number field. Any of the orders listed can be selected or the Selected Order Number can be overwritten with an order that is not currently open. Click OK to continue.



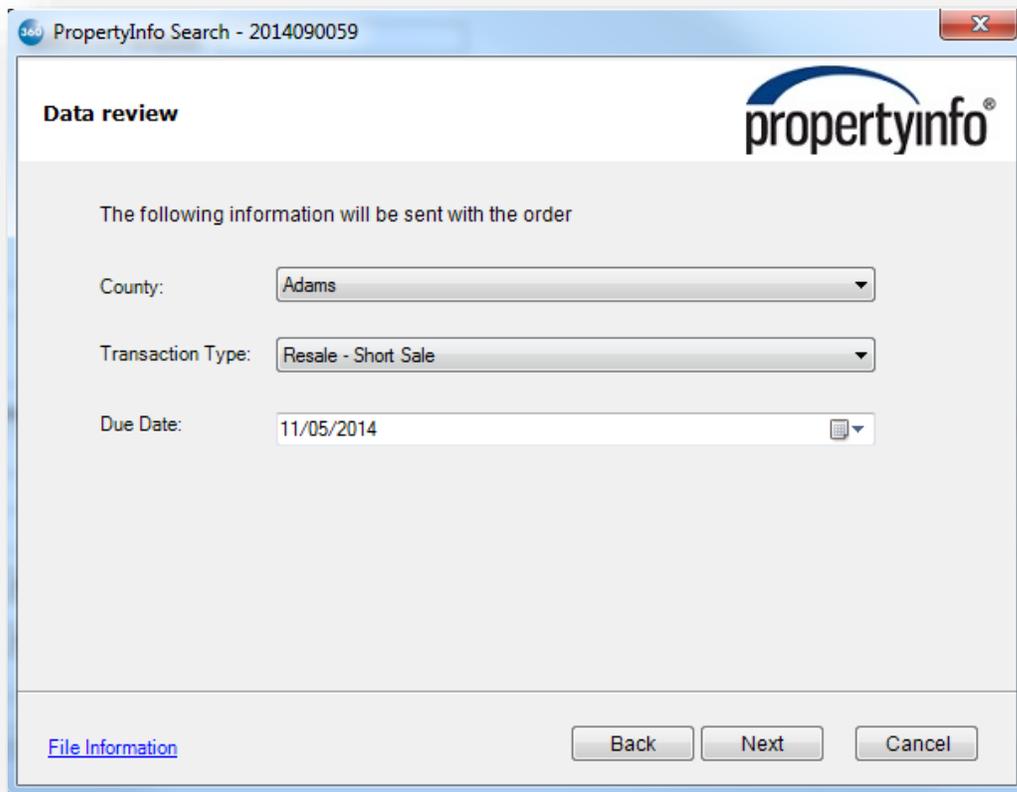
The Welcome screen provides a brief description about PropertyInfo along with PropertyInfo's support contact information. This screen may be skipped in the future by clicking on the Skip Welcome Page option. Click Next to continue.



The Login screen requires a User ID and password provided by PropertyInfo. If the Remember me check box is selected the User ID and Password will be saved the next time the product is launched. Click Next to continue.



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 ProForm Order. If a match can not be made then a County will need to be selected from the drop down. Once all information is selected click Next to continue.



Should you wish to view or edit the File Information, select the Blue Hyperlink (File Information) in the Bottom Left on the Date Review Screen.

PropertyInfo Search - 2014090059

File Information 

The following information will be sent with your order

| | | | |
|------------------|-------------------------------|--------------|-------|
| Property Type | Single Family | | |
| Address | 132 | Smith Street | |
| City/ State/ Zip | Dallas | WI | 02500 |
| Sales Price | | | |
| Loan 1 | | | |
| Loan Amount | | | |
| Lender Name | | | |
| APN/ Parcel ID | 202530481900010710 | | |
| Subdivision | Remington - Phase 1 Tract 'F' | | |
| Lot | | | |
| Unit | | | |
| Municipality | Dallas | | |

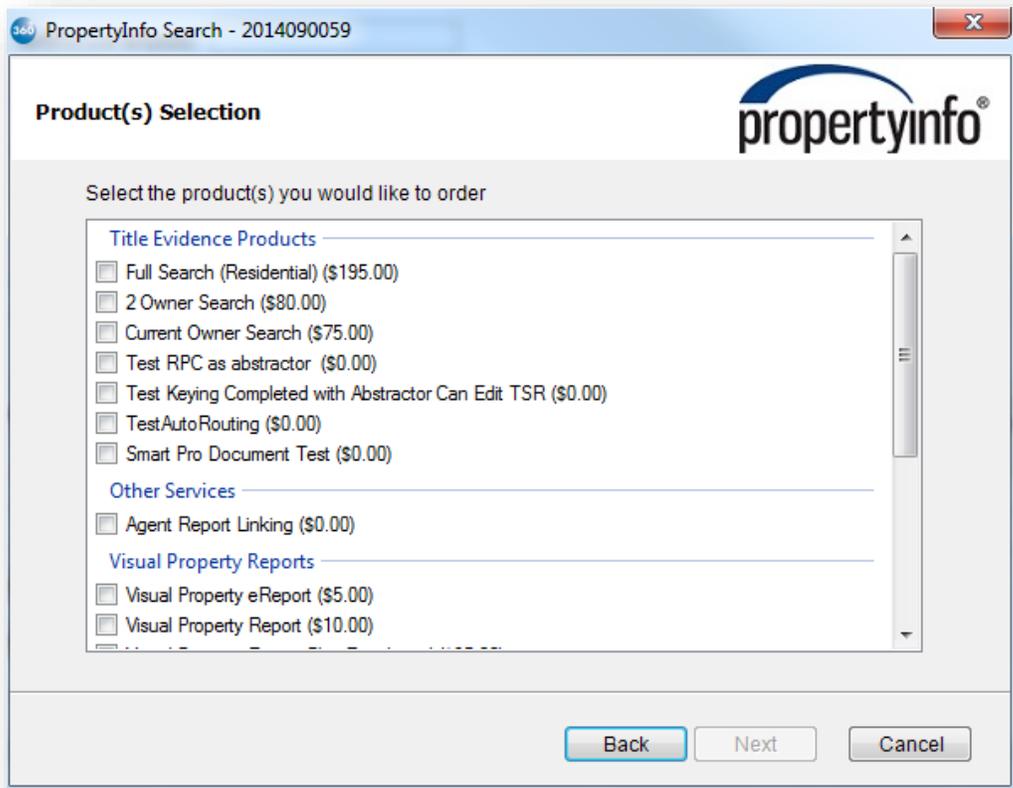
Note: Edits made here will not update your ProForm Order

OK Cancel

The appropriate information concerning the ProForm Order will be displayed on the File Information Screen. You may edit or update the values listed on this screen as needed.

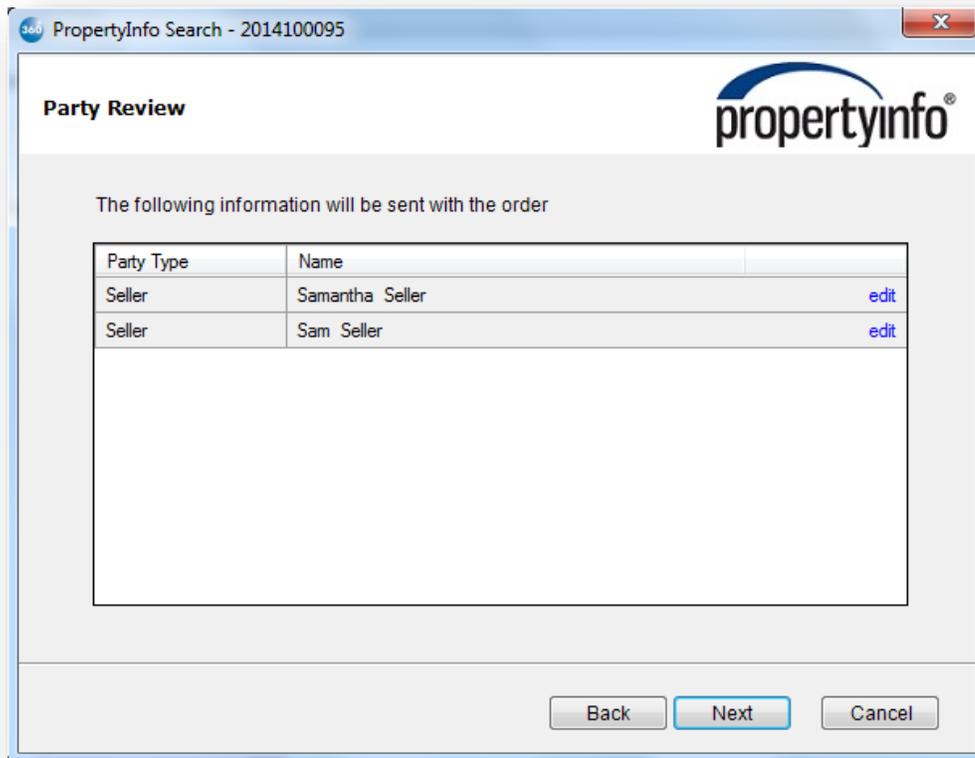
NOTE: Edits made on the File Information **will not** update your ProForm Order.

From the Data Review Screen, click "Next" to proceed to the the Product Selection screen. The Product Selection screen will display the available products based upon the values selected on the Data Selection screen above.



You may select one or multiple products to order through the PropertyInfo. At least one product needs to be selected in order to proceed to the next screen.

Once you have selected the desired products, Click “Next” to proceed to the Party Review screen.



You can view the relevant parties in the ProForm Order that will be sent to PropertyInfo if the requested product requires such information. To edit the the names being submitted, click the blue “edit” link to the right of the name you wish to edit. This will bring up the Party Detail Name dialogue.

PropertyInfo Search - 2014100095

Party Name Detail

propertyinfo®

| First Name | Middle Name | Last Name | Suffix |
|------------|-------------|-----------|--------|
| Samantha | | Seller | |

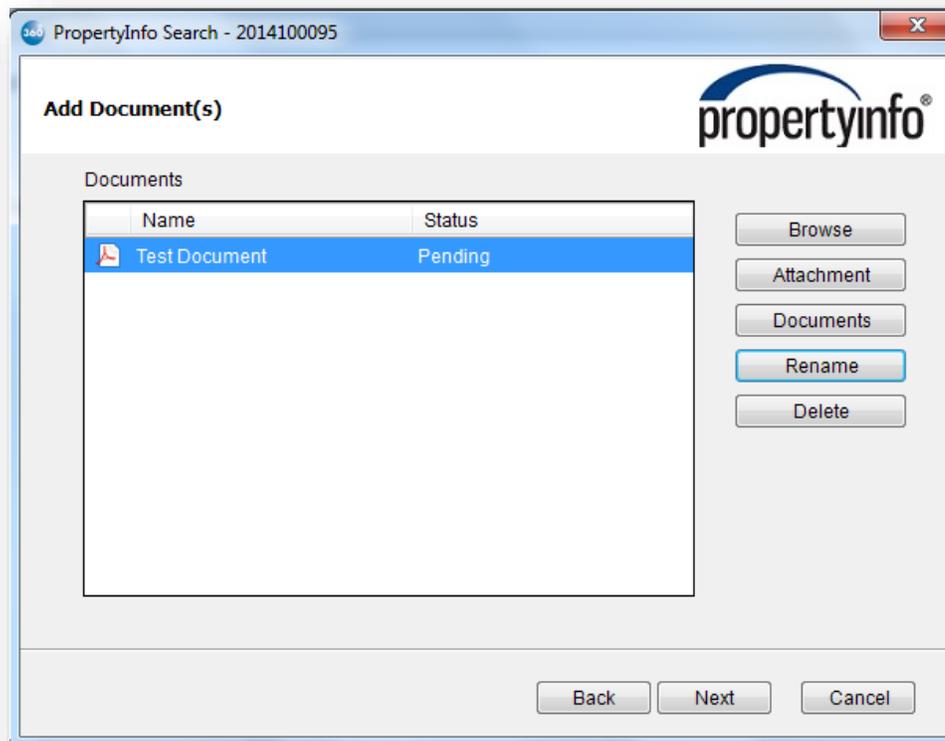
Note: Edits made here will not update your ProForm Order

OK Cancel

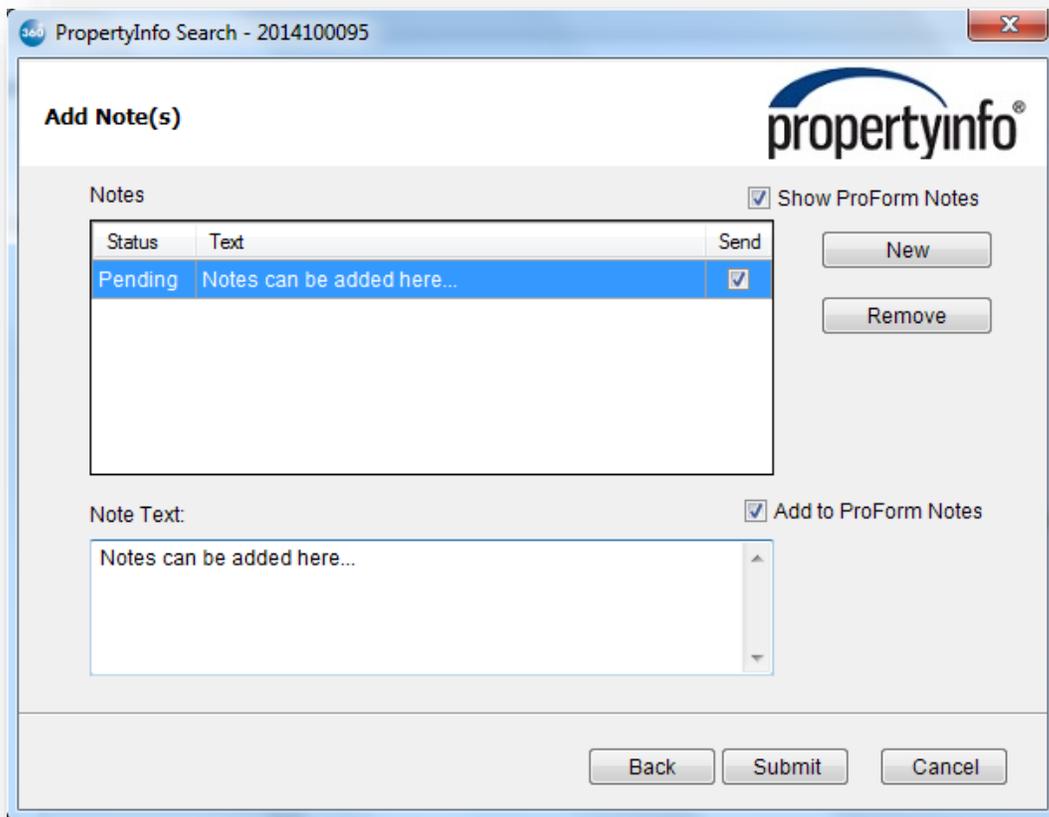
NOTE: Edits made on the File Information **will not** update your ProForm Order.

Click Next to continue to the Add Documents screen.

The Add Document(s) screen allows for a document to be attached and submitted. Once the document(s) is attached click Next to continue.



You may add Note(s) relating to the product(s) if you wish, this can be done by clicking "New" on the Add Note(s) screen.

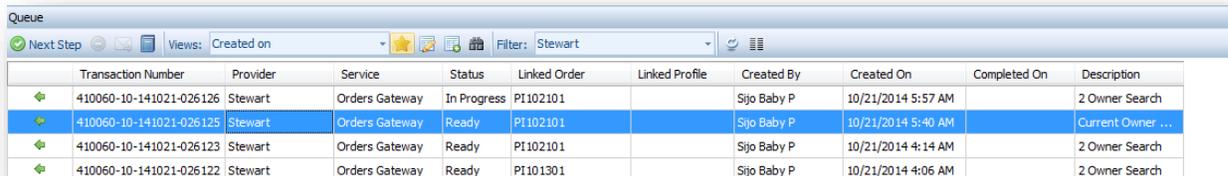


The notes added will be added to the ProForm Order notes. If you wish notes not to write to the ProForm Order, uncheck the “Add to ProForm Notes” checkbox.

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. The PropertyInfo product will be reflected in the description field. To update the transaction click Next Step to be taken to the document attachment screen to attach documents or add notes to the transaction.

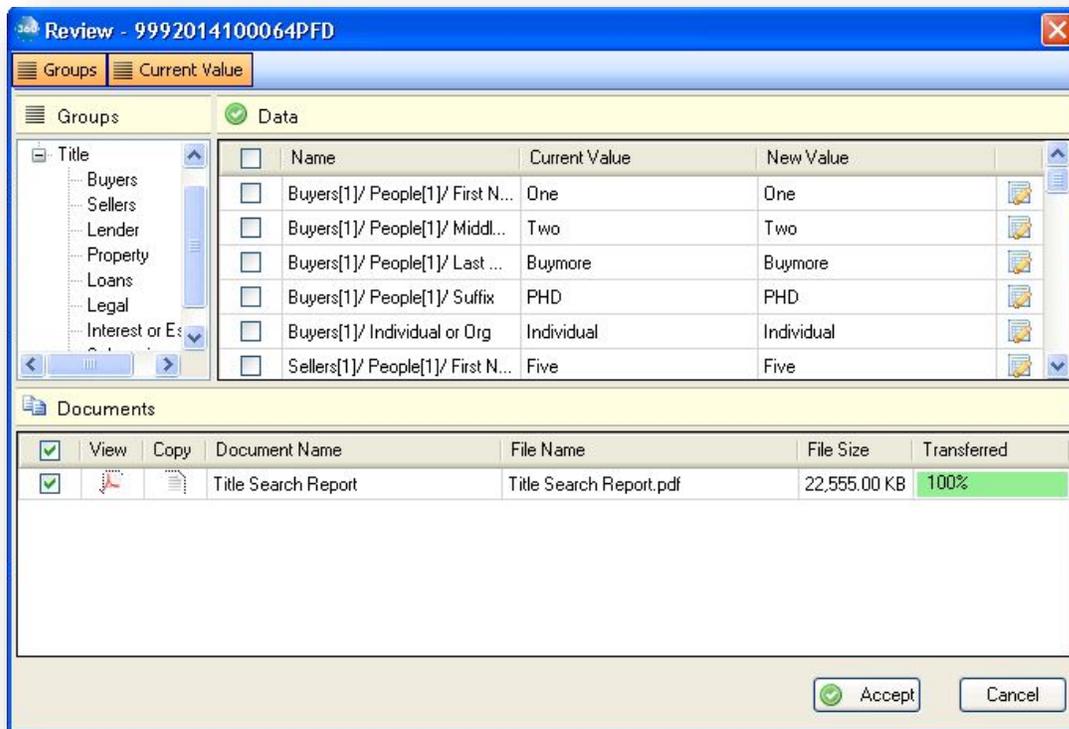


The screenshot shows the 'Queue' window in SoftPro 360. It features a toolbar with 'Next Step', 'Views: Created on', and a 'Filter: Stewart' dropdown. Below is a table with the following data:

| Transaction Number | Provider | Service | Status | Linked Order | Linked Profile | Created By | Created On | Completed On | Description |
|-------------------------|----------|----------------|-------------|--------------|----------------|-------------|--------------------|--------------|-------------------|
| 410060-10-141021-026126 | Stewart | Orders Gateway | In Progress | PI102101 | | Sijo Baby P | 10/21/2014 5:57 AM | | 2 Owner Search |
| 410060-10-141021-026125 | Stewart | Orders Gateway | Ready | PI102101 | | Sijo Baby P | 10/21/2014 5:40 AM | | Current Owner ... |
| 410060-10-141021-026123 | Stewart | Orders Gateway | Ready | PI102101 | | Sijo Baby P | 10/21/2014 4:14 AM | | 2 Owner Search |
| 410060-10-141021-026122 | Stewart | Orders Gateway | Ready | PI101301 | | Sijo Baby P | 10/21/2014 4:06 AM | | 2 Owner Search |

How to Review a Transaction

Once PropertyInfo has completed the transaction the status will change to Ready in the SoftPro 360 Queue. Highlight the transaction and click the Next Step Button or double click on the transaction to open the review screen.



The screenshot shows the 'Review - 9992014100064PFD' window. It has a 'Groups' tab and a 'Current Value' tab. The 'Data' section contains a table with the following data:

| <input type="checkbox"/> | Name | Current Value | New Value | |
|--------------------------|-----------------------------------|---------------|------------|--|
| <input type="checkbox"/> | Buyers[1]/ People[1]/ First N... | One | One | |
| <input type="checkbox"/> | Buyers[1]/ People[1]/ Middl... | Two | Two | |
| <input type="checkbox"/> | Buyers[1]/ People[1]/ Last ... | Buymore | Buymore | |
| <input type="checkbox"/> | Buyers[1]/ People[1]/ Suffix | PHD | PHD | |
| <input type="checkbox"/> | Buyers[1]/ Individual or Org | Individual | Individual | |
| <input type="checkbox"/> | Sellers[1]/ People[1]/ First N... | Five | Five | |

Below the data table is a 'Documents' section with a table:

| <input checked="" type="checkbox"/> | View | Copy | Document Name | File Name | File Size | Transferred |
|-------------------------------------|------|------|---------------------|-------------------------|--------------|-------------|
| <input checked="" type="checkbox"/> | | | Title Search Report | Title Search Report.pdf | 22,555.00 KB | 100% |

At the bottom right, there are 'Accept' and 'Cancel' buttons.

PropertyInfo will return data and document(s) which will be visible on the Review Screen. The Review Transaction screen allows document(s) to be viewed by clicking the View icon. Click Accept to add the data and document(s) to the linked ProForm order. The document(s) will be available from within the linked ProForm order via the SPImage icon located on the ProForm Menu bar, or for Select users, the document(s) will be available by clicking on the Attachments & Documents History link located in the documents tab. If the data and documents should not be accepted, the Cancel button closes the Review screen and no data or documents will be accepted.

Request an Update:

The transaction will update to an Accepted status after clicking Accept. Although the transaction is in an Accepted status updates can still be sent and received by highlighting the transaction and either double clicking or clicking the Next Step icon. Incoming updates will change the status of the transaction to 'Ready' then back to 'Accepted' after the updates have been accepted

Update

propertyinfo®

Order an update

Provide your PropertyInfo credentials

User ID:

Password:

Remember me

Back Next Cancel