

# 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.

Order Linking
Open Order Numbere:
PropertyInfo1
Selected Order Number:
PropertyInfo 1
OK Cancel

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.

Velcome	propertyinfo
PropertyInfo delivers fast, affordable and accurate title	searches.
Dur title search division provides: • Superior quality product: Title experience, knowledge and • Competitive pricing: Our products are priced to give you th • Comprehensive range of products:	extensive Q/A assures the highest accuracy. le best service at an optimum cost.
<ul> <li>Full title search (Purchase transactions)</li> <li>Current Owner or 2 Owner search (Refinance trans</li> <li>Default title search reports</li> <li>Owner and Encumbrance reports</li> <li>UCC</li> <li>Lien and judgment information</li> <li>Custom products available upon request.</li> </ul>	actions)
For additional information or support, please contact: Phone: (866) 464-8179 Fax: (410) 335-6399	
Website: <u>propertyinfo.com</u> Email: <u>titlesearch@propertyinfo.com</u>	
Skip Welcome Page	Next Cancel

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.

PropertyInfo Se	arch - 2014100095
	Provide your PropertyInfo credentials         User ID:       User ID:         Password:         Password:         Image: Remember me         Use your PropertyInfo login credentials. If you do not have a PropertyInfo account or need assistance please contact PropertyInfo at titlesearch@propertyinfo.com or call (866) 464-8179
	Back Next Cancel

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.

PropertyInfo Search - 20	14090059		
Data review		proper	tyinfo
The following info	rmation will be sent with the order		
County:	Adams	•	]
Transaction Type:	Resale - Short Sale		]
Due Date:	11/05/2014		
File Information		Back Next	Cancel
			_

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.

-			٩	roporcynno
The following infor	mation will be sent	with your order		
Property Type	Single Family	1		^
Address	132	Smith Street		
City/ State/ Zip	Dallas	WI	02500	
Sales Price				=
Loan 1				•
Loan Amount				
Lender Name				
APN/ Parcel ID	2025304819000	10710		
Subdivision	Remington - Pha	se 1 Tract 'F'		
Lot				
Unit				
Municipality	Dallas			
Note: Edits made I	here will not update	vour ProForm Order		
Note: Lans made	nere will not update	your nor onn order		

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.

oduct(s) Selection	propertyinfo
Select the product(s) you would like to order	
Title Evidence Products         Full Search (Residential) (\$195.00)         2 Owner Search (\$80.00)         Current Owner Search (\$75.00)         Test RPC as abstractor (\$0.00)         Test Keying Completed with Abstractor Can Edit TSR (\$0.00)         TestAutoRouting (\$0.00)         Smart Pro Document Test (\$0.00)         Other Services         Agent Report Linking (\$0.00)         Visual Property Reports         Visual Property Report (\$5.00)         Visual Property Report (\$10.00)	
Back	Next Cancel

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.

ty Review		propertyinfo
The following	information will be sent with the order	
Party Type Seller	Name Samantha Seller	adit
Seller	Sam Seller	edit
		Back Next Cancel

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						
propertyinfo						
Last Name Suffix Seller						
ır 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.

PropertyInfo Search - 201410009	5	X
Add Document(s)		propertyinfo
Documents		
Name          Image: Name      <	Status Pending	Browse Attachment Documents Rename Delete
	Bac	ck Next Cancel

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

dd Note(s)	propertyinfo
Notes	Show ProForm Notes
Status     Text       Pending     Notes can be added here	Send New Remove
Note Text: Notes can be added here	Add to ProForm Notes
	Back Submit Cancel

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 attachement screen to attach documents or add notes to the transaction.

🔊 Next S	tep 💿 🖂 🗐 Views: Cr	eated on	- 🚖 💆	🐻 🏙 Fi	ter: Stewart	-	<u> </u>			
	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.

Groups	🕑 D	ata						
🛛 Title 📉 📩		Name Current Value		New Value				^
- Buyers - Sellers - Lender - Property - Loans - Legal - Interest or Es		Buyers[1]/ People[1]/ First N.	One	One				
	Buyers[1]/ People[1]/ Middl         Buyers[1]/ People[1]/ Last         Buyers[1]/ People[1]/ Suffix         Buyers[1]/ Individual or Org		Two	Two	Two Buymore			
			Buymore	Buy				
			PHD	D PHD				
			Individual	Indi	Individual			
		Sellers[1]/ People[1]/ First N	Five	Five Five		ve		~
Documents	Docum	ant Nama	File Name		File Size	Transform	ud .	-
	Title Se	arch Beport	Title Search Beport odf		22 555 00 KB	100%	;u	
	1100 000	sion nopole			22,000.00110			

PropertyInfo will return data and document(s) which will be visable 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 will 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