Sync User Guide
V1.0

June 11, 2019

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Introduction

This document provides steps on how to use Sync to send a title search or a bringdown request to a provider that you select and how to receive the results of those requests returned from the provider.

Launching Sync

Access from the 360 Services Menu

From the **360 → Services** menu, double-click **Sync – Powered by SoftPro** located under the **Title Services** folder. This will open the **Order Linking** screen:
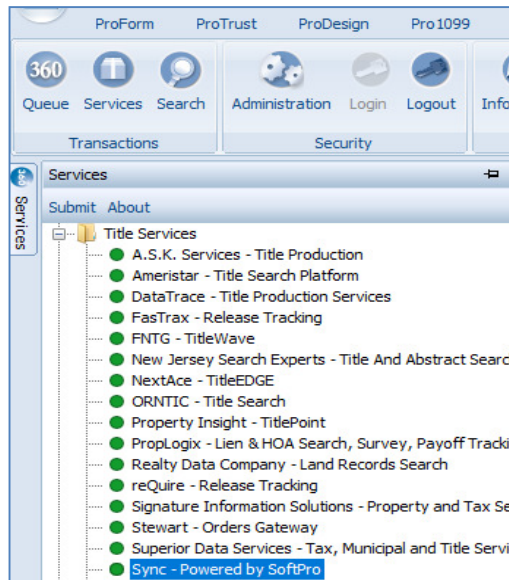
Figure 1 - SoftPro 360 Services Menu

Linking a ProForm Order

From the **Order Linking** screen, select the ProForm order that will be sent to the title provider you select in Sync.
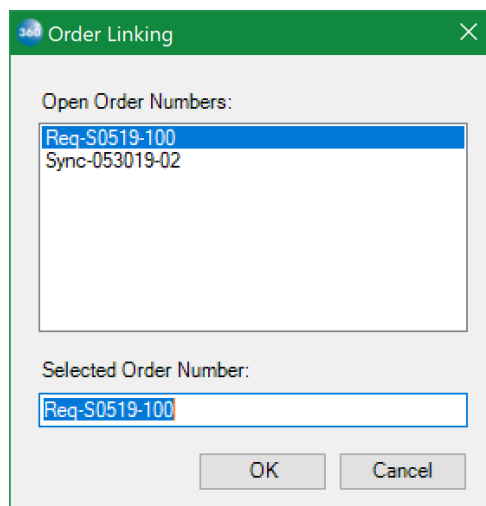
Figure 2 – Order Linking Screen

Requesting a Title Search

Specifying Order Data

The **Order Services** screen will display. Specify the information needed for your request.

Figure 3 – Request Summary Screen for a New Title Search

- **Service Provider** – Select a title provider from the list.
  - ○ If you are a first-time user of Sync, no providers will display in the drop down, and you must click **Add New** to add the providers you wish to send your request.
  - ○ You must know the provider's serial number, and they must be registered with SoftPro as a valid title provider for Sync.
  - ○ You can add up to 10 providers, which will remain as options for any order you use with Sync going forward. If you add another provider to a list that already has 10 provider options, then the least recently used will be dropped from the list. By default, the last provider you used will be selected.

Figure 4 – Add Service Provider Screen

- **Provider Details** – Displays the email and website addresses of the provider you select.
- **Service** – Will always display as "Order Title" for this version of Sync.
- **Product** – Select from a list of title products offered by the provider.
- **Ordered by** – Select who is placing this request. If your order is in Select, it will select what you have designated as the **Escrow office** in your order by default. Otherwise, it will be blank.
- **Contact email** – Select at least one or more points of contact for the provider.
  - The email addresss selected will receive notifications when the results of a title search or bringdown request have been returned to you in 360, or if the provider has rejected or canceled your request.
  - Your 360 user email address will be selected by default.
  - You can add an email address by entering it in the last line of the grid next to the checkbox with no contact.
- **Notes** – Manually add instructions or comments about your order. Check **Add to ProForm Notes** to automatically add your notes to your ProForm order upon submitting your request.
- **Add Documents Link** – See the **Add Documents** section.

Adding Documents

Clicking the **Add Documents** link on the Order Services screen will navigate you to the **Add Documents** screen where you can attach documents to be sent along with your order to the provider you select. You can **browse** and select the document from your system, or you may select any documents **already attached** to your ProForm order.
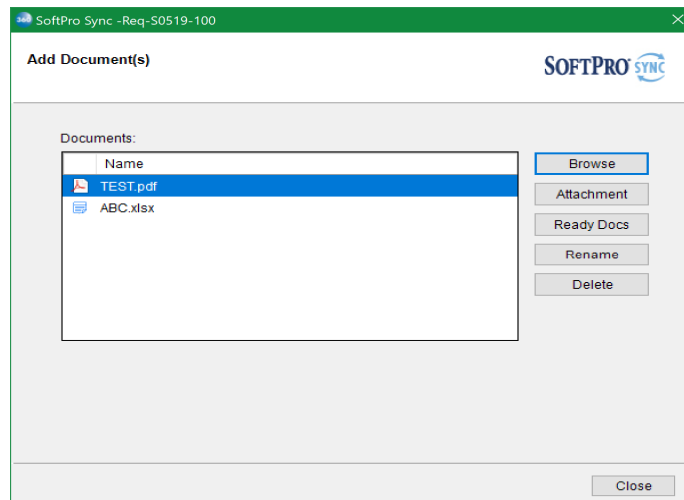
Figure 5 – Add Documents Screen

Figure 6 – Add Documents Screen –> Browsing for Documents

Figure 7 – Add Documents Screen –> Adding Attached Documents from your Order

You can also **rename** or **delete** any attachment by selecting the document and performing the desired action. Once you have added the desired documents to your order, click **Close** to return to the **Order Services** screen.
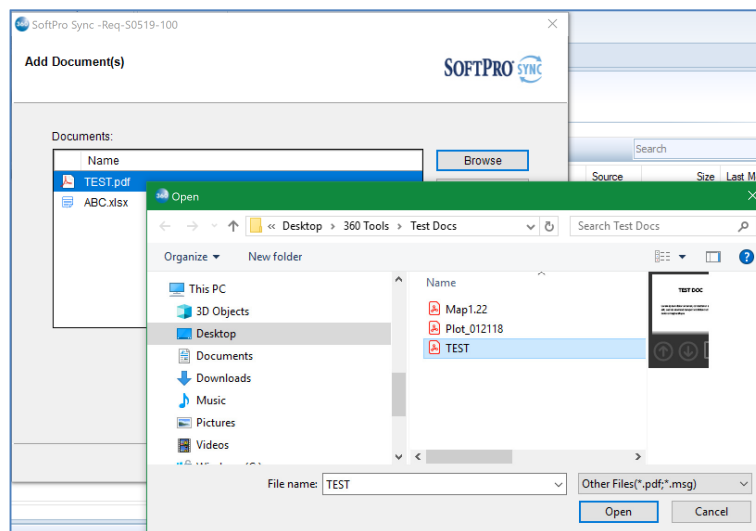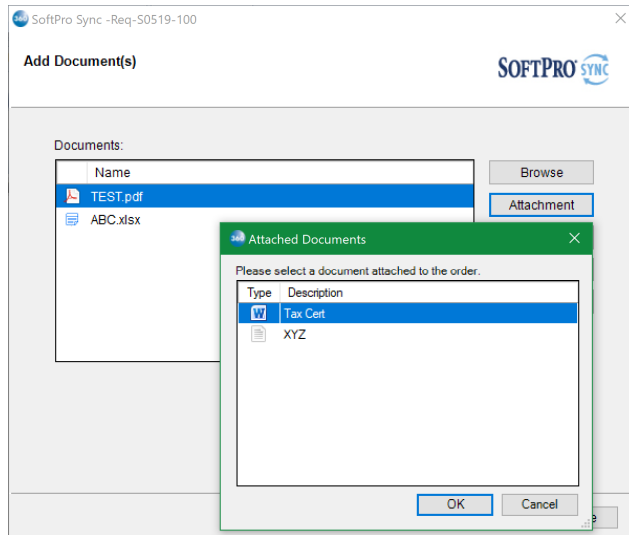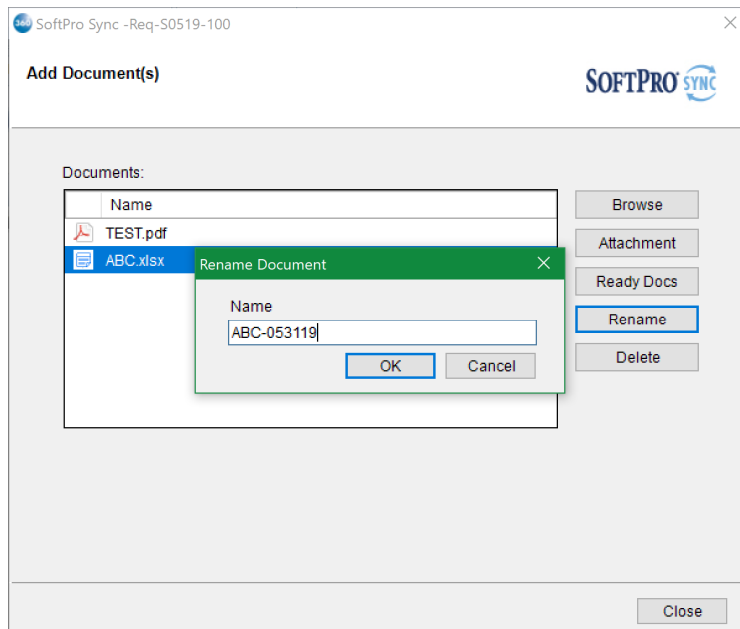

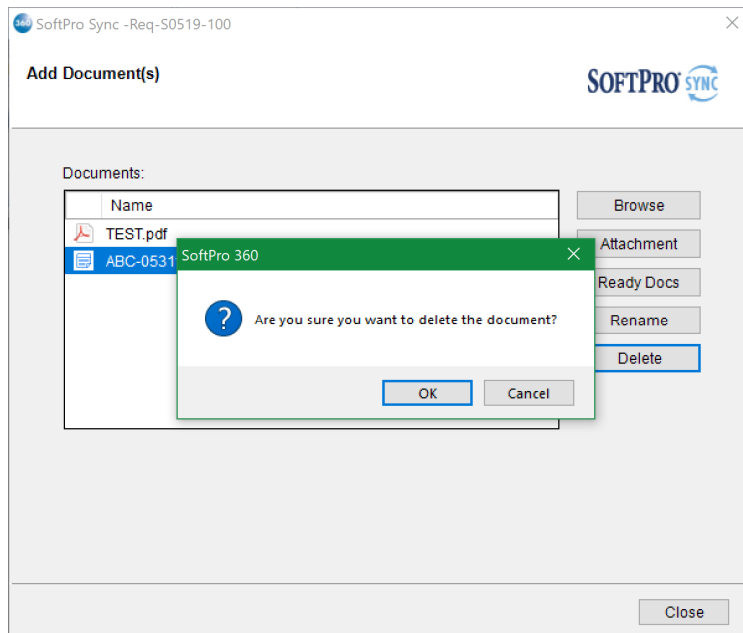*Figure 8 – Add Documents Screen –> Rename Document*

Figure 9 – Add Documents Screen –> Delete Document

Submitting the Request

Click **Submit** to send the order details to the title provider you selected. A notification will display once they receive the request. The provider will also receive an email notification that you have sent them a new order request. Click **OK** to return to your ProForm order and to track the transaction from the 360 Queue.

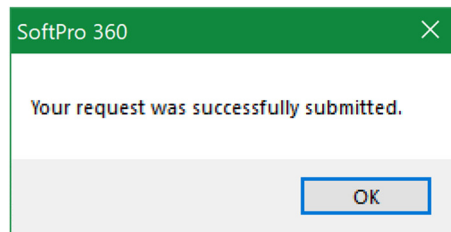*Figure 10 – Successful Submission of Title Search Request*

When an order is submitted successfully to the provider, a transaction is created in 360 and displayed in the Queue with an **In Progress** status. The **Linked Order** column will display the ProForm order number, and the **Description** column will display the property address being searched.

*Figure 11 – SoftPro 360 Queue –> In Progress Status*

Canceling a Request

You can cancel your request with the title provider as long as your transaction is in an **In Progress** status. From the 360 Queue, highlight the transaction and then click the red **Cancel** button from the 360 Queue's toolbar. This will open the **Cancel** screen.
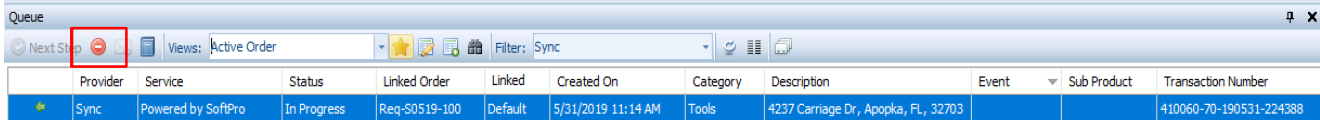
Figure 12 – SoftPro 360 Queue –> Cancel Button

Enter the reason for canceling your order and click **Submit**. The provider will receive an email notification for the cancellation.
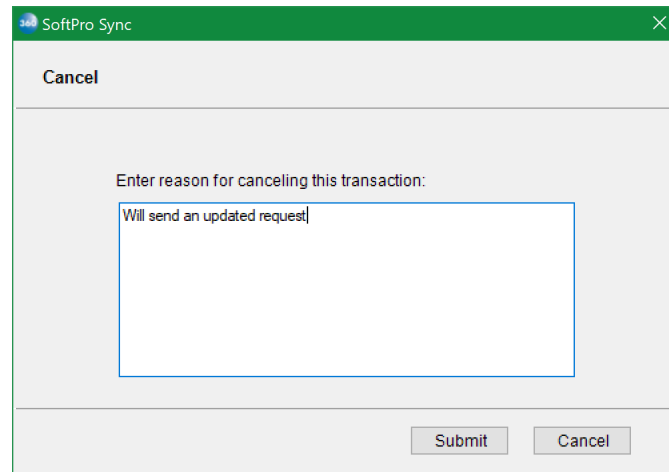
Figure 13 – Cancel Screen

The transaction status in your queue will update to **Canceled** as will the status of the provider's transaction.
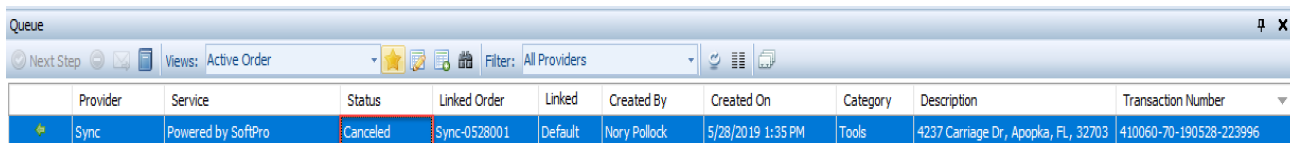
Figure 14 – SoftPro 360 Queue – Canceled Status

A provider may also choose to cancel a request that you have submitted to them. As a result, you will receive an email notification and your corresponding transaction will automatically be updated with a **Canceled** status.

Rejected Request by the Provider

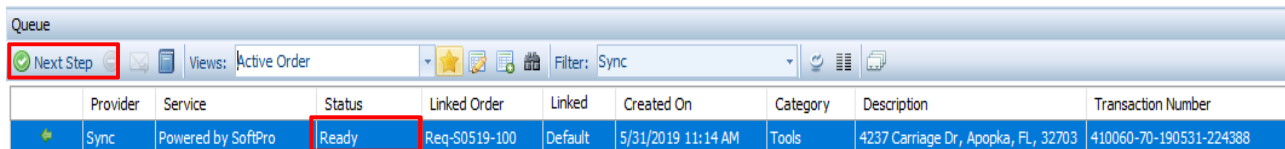A provider may choose to reject your request once they receive it but before they accept the data into their order. You will receive an email notification with a reason for their rejection and your transaction will be updated with a **Rejected** status.
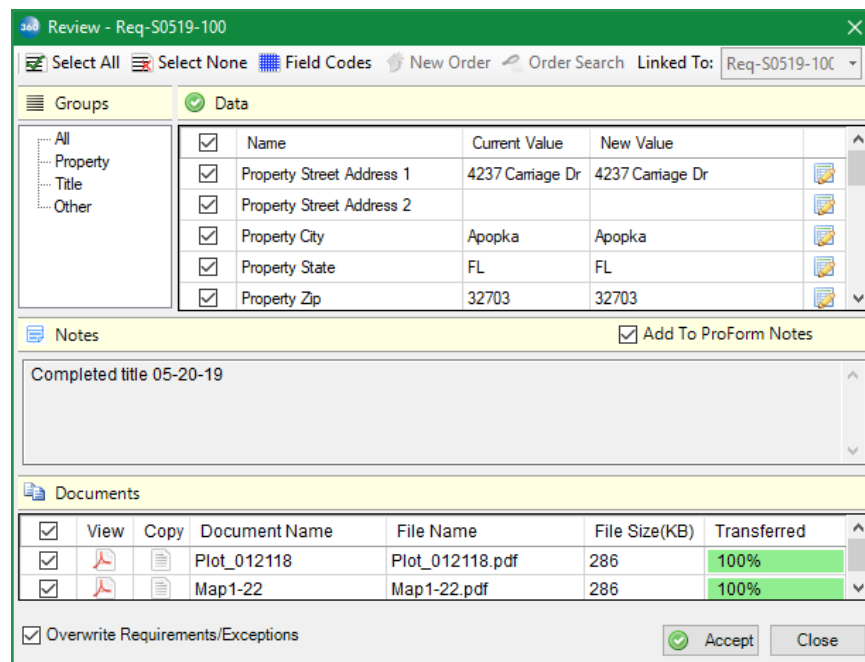
Receiving Title Search Results

Once the provider completes the title search and successfully sends you the data and documents via 360, you will receive an email notification, and the corresponding transaction in 360 will update to a **Ready** status. Highlighting the transaction and clicking **Next Step** will open the Review screen where you can view this information.

Figure 15 – SoftPro 360 Queue –> Ready Status

From the Review screen, you can view the title data and documents returned by the title provider and specify those that you want to include in your ProForm order.

Figure 16 – Review Screen of Remitted Title Data

- **Groups** – Displays the data tree. Selecting a branch of the tree will display only the data relevant to that branch.
- **Data** – Displays the **Current Value** for the field in your order and the **New Value** sent by the title provider. The New Value will overwrite the Current Value when you click **Accept**.
- **Notes** – Any comments added by the provider will display here. Check **Add to ProForm Notes** if you want to import it into your ProForm order notes for future reference.
- **Documents** – Displays the documents that you want to attach to your order**.** The **View** icon 📄 allows you to open and review the document prior to importing it into the order, and the **Copy** icon 📄 allows you to copy and paste the document to your desktop.
- **Overwrite Requirements/Exceptions** - Overwrites all the requirements and exceptions that currently exist in your order with those returned by the provider when you click **Accept**. Will be checked by default.

Click **Accept** to import the data and documents into your order. The transaction status will change to **Accepted** in the 360 queue. If you decide to not take any action at this time, click **Close** instead. Your transaction's status will remain **Ready**, and you will be able to return to the **Review** screen at a later time to accept the information.
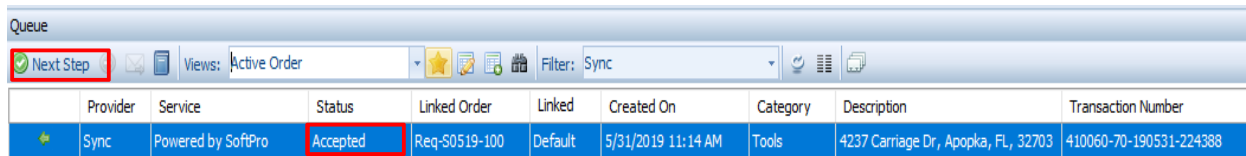

Figure 17 – SoftPro 360 Queue –> Accepted Status

Requesting a Bringdown
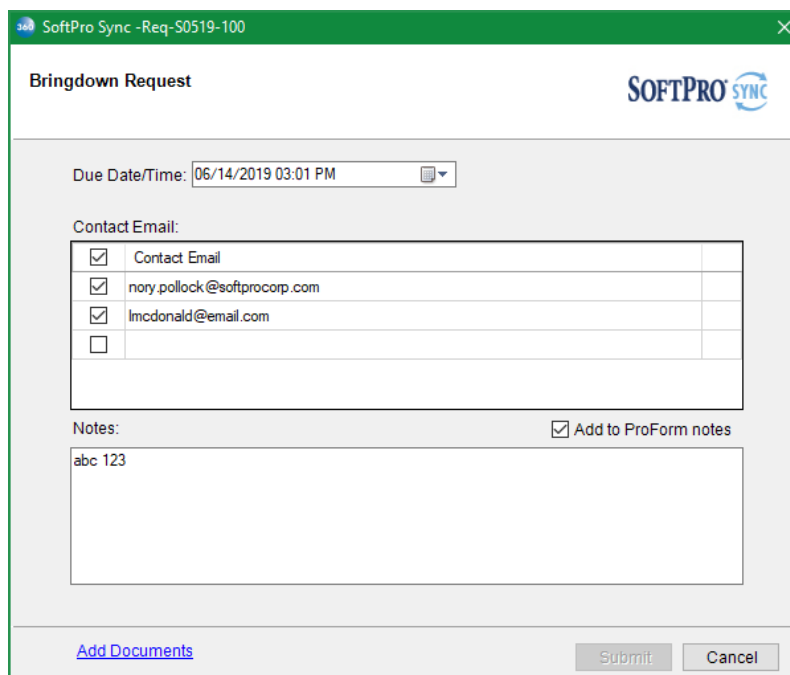
Specifying Bringdown Data

You can request an update to your order if the corresponding transaction has a status of **Accepted**. Highlight the transaction and click **Next Step**. This will open the **Bringdown Request** screen.

Figure 18 – SoftPro 360 Queue –> Opening the Bringdown Request Screen

- **Due Date/Time** – Select the due date and time you would like to receive the results of your request.
- **Contact Email** – Select the contacts for your request. The same email addresses displayed in the grid for the original submission will be displayed including those that were manually added. Selected contacts will receive email notifications when the results of the bringdown are returned to you via 360.
- **Notes** – Enter instructions about your order. Check **Add to ProForm Notes** to automatically add your notes to your ProForm order upon submitting your request.
- **Add Documents Link** – See the **Adding Documents** section.

Figure 19 – Bringdown Request Screen

Submitting the Bringdown Request

Click **Submit** to send the bringdown details to the title provider. A notification will display once they receive the request. The provider will also receive an email notification that you have sent them a bringdown request. Click **OK** to return to your ProForm order and to track the transaction from the 360 Queue.
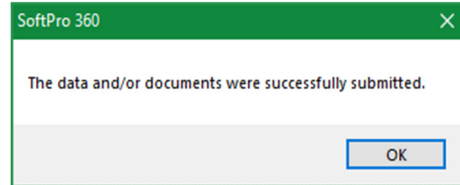
Figure 20 – Successful Submission of a Bringdown Request

The transaction status will update to **In Progress**.

Figure 21 – SoftPro 360 Queue –> In Progress Status of Bringdown Request

Canceling a Bringdown

Refer to the Canceling a Request section of this document for guidance on how to cancel a bringdown request.

Rejected Bringdown by Provider

Refer to the Rejected Request by the Provider section of this document for information on when a provider rejects a bringdown request.

Receiving Bringdown Results

Refer to the Receiving Title Search Results section of this document for guidance on how to receive and import bringdown results information into your order.