Mortgage Cadence: Collaboration Center User Guide

March 2019

(Last revised 1/22/21)

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A New Transaction in the 360 Queue

To request title and settlement services, a lender creates a Message in Collaboration Center, attaches a Title Order.xml File and sends it to you using your email address. You will receive an email from Mortgage Cadence with the names of the Lender and the person who sent the Message. You will also see a **New** transaction in your 360 Queue.

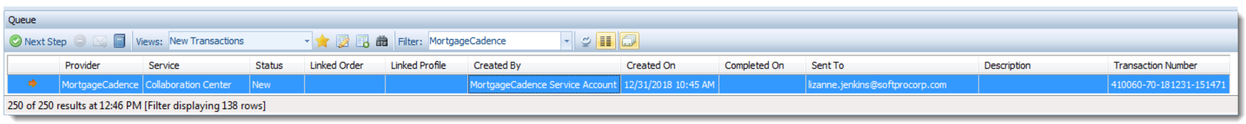


Figure 1. 360 Queue: New Transaction

User Tip: Create a New View to display only New orders sent to you and add it to your Favorite Views to quickly find your New orders.

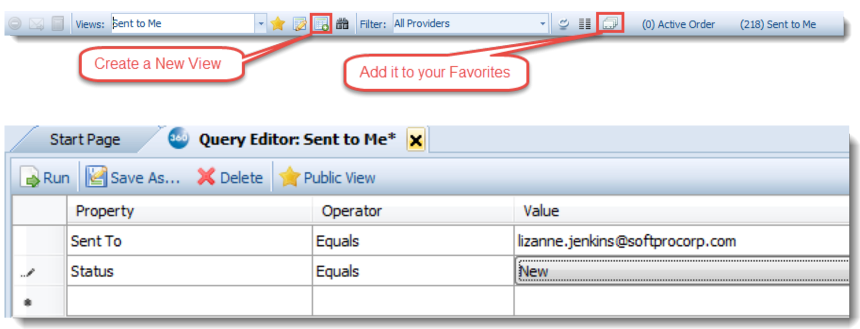


Figure 2. User Tip: Add a New View to Your Favorites

Select the **New** transaction and Next Step or double-click on the transaction to access the order data. The first time you access the Mortgage Cadence service, a **Login** screen opens for you to enter you Collaboration Center **Username** and **Password**.

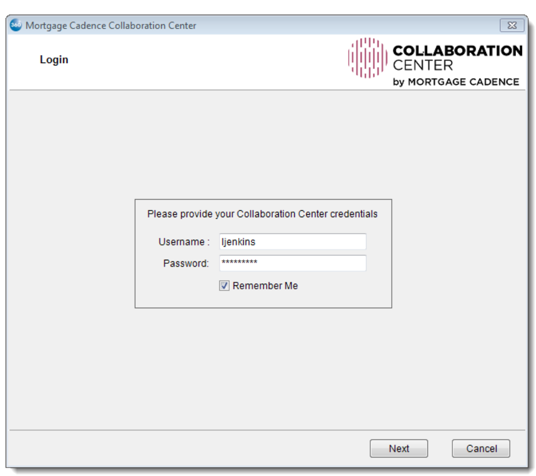


Figure 3. Login Screen

If you check the **Remember Me** checkbox, you won't be prompted for your credentials the next time you open a Mortgage Cadence transaction. If you later change your Collaboration Center password, or if Mortgage Cadence required you to change it but you haven't done so, this message is displayed:

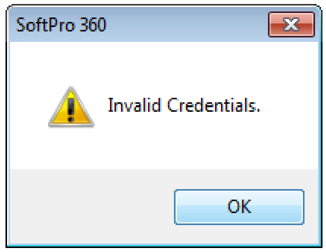
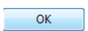


Figure 4. Error Message: Invalid Credentials

Click  to close the message box and enter the correct Username and Password combination.

The Review Screen

Once your Username and Password have been authenticated by Collaboration Center, the Review screen opens:

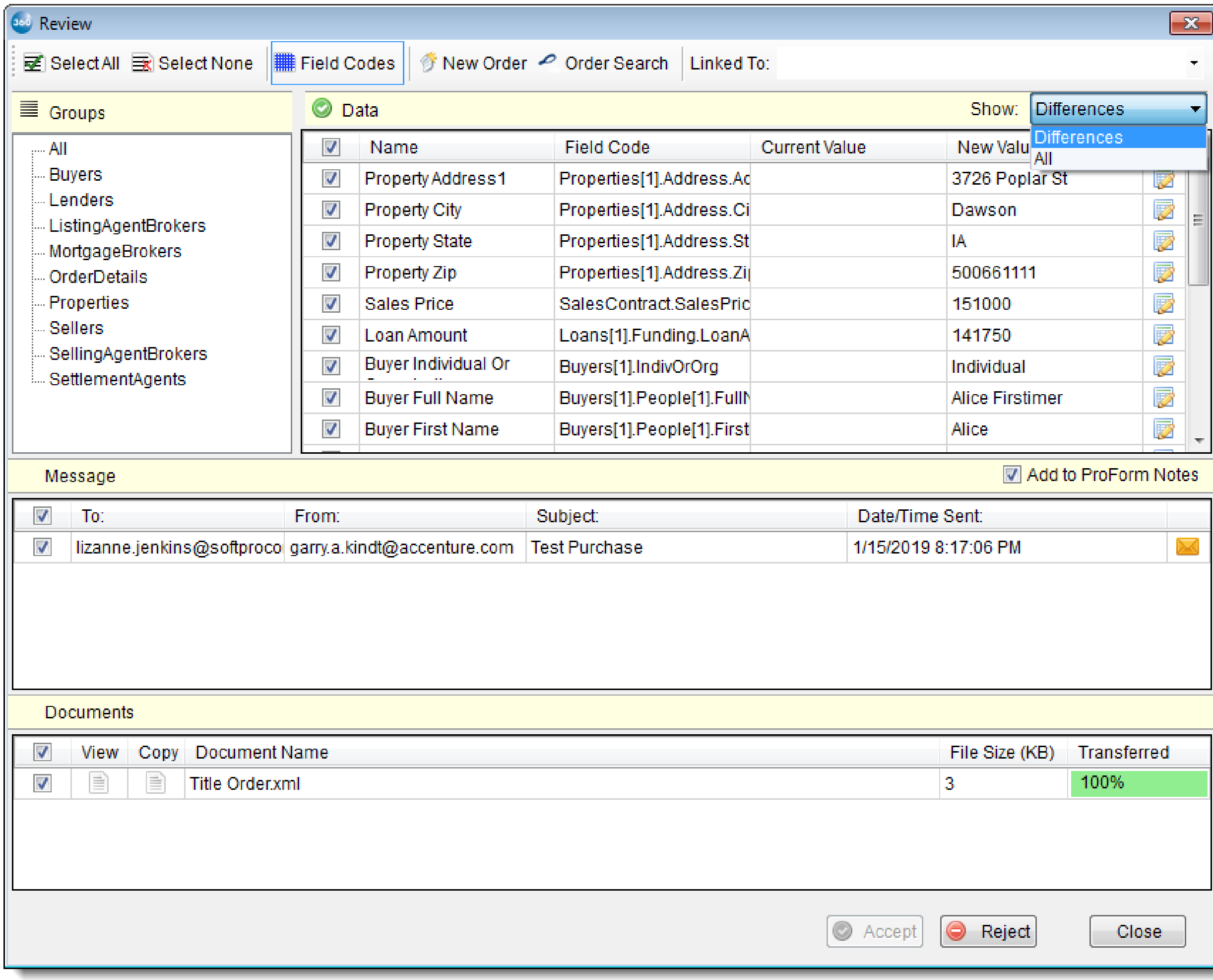
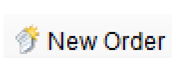


Figure 5. The Review Screen

Linking to a ProForm Order

The New transaction must be linked to a ProForm order by one of the following methods:

1. *Creating a new order*

   Selecting 

 opens the **New Order** screen in ProForm.

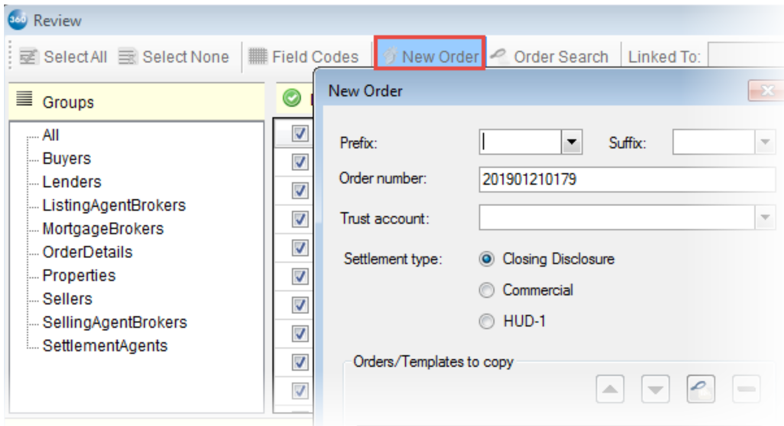


Figure 6. Order Linking: New Order

2. *Searching for an existing order*

Selecting Order Search opens the Order Search screen in ProForm.

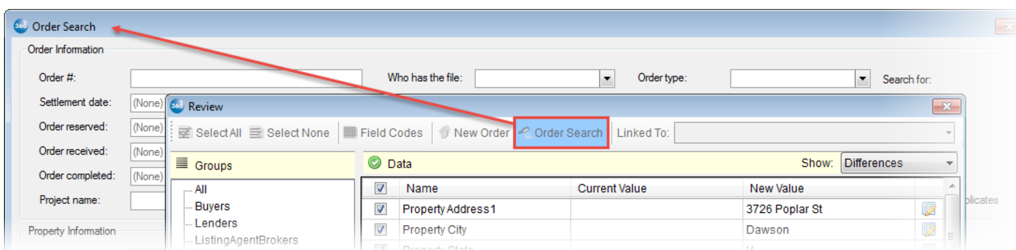


Figure 7. Order Linking: Order Search

3. *Linking to an open order*

Select the dropdown arrow in Linked To: to link the New transaction to one of your open orders.

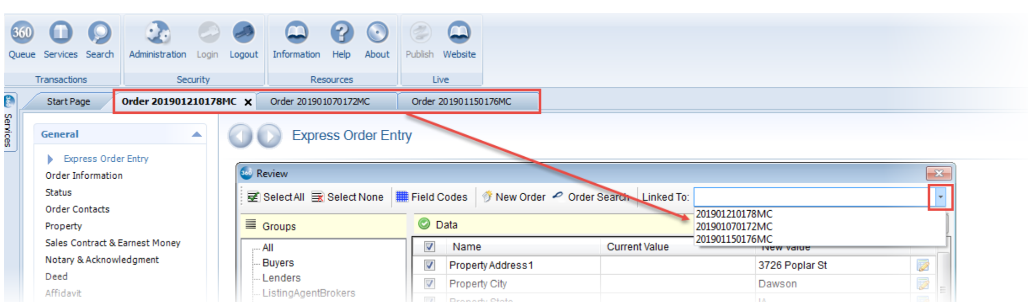


Figure 8. Order Linking: Open Orders

Linking an order to the transaction may take several seconds as 360 also is uploading the data from the linked order into the Current Value fields in the Review screen.

Once an order is linked, 

becomes enabled so that you can import the **Data**, **Message** and **Documents** into the linked ProFrom order.

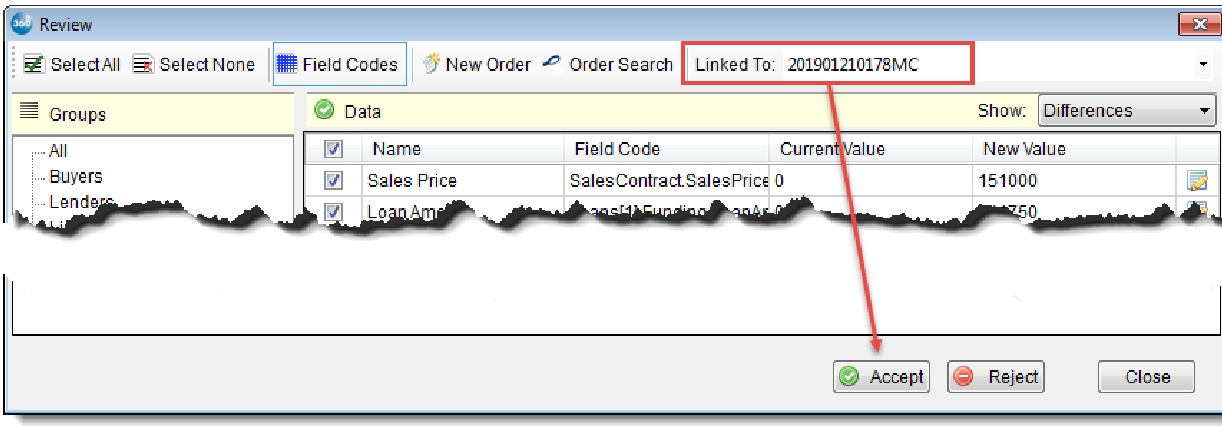


Figure 9. Order Linking Enables Accept Button

<u>Data Section</u>

The top of the **Review** screen displays the loan data for the new order. Once an order has been linked, the **Current Value** column displays the data, if any, in the linked order. The **New Value** column displays the data that has been sent from the lender. By default, all the data that is different from what is in your linked order displays when you link the transaction to a ProForm Order.

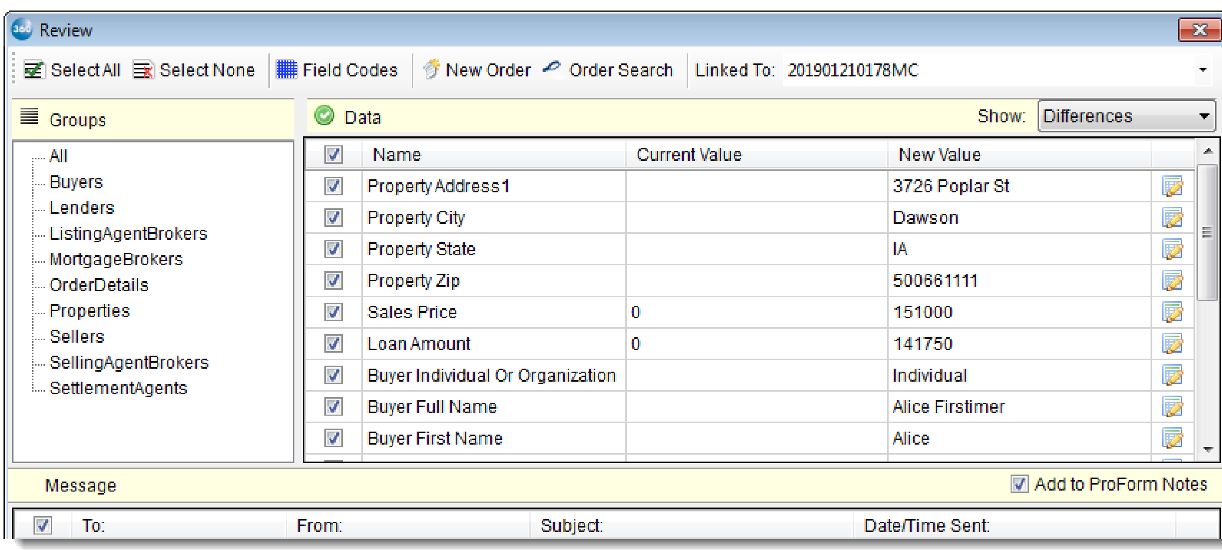
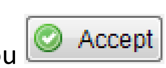


Figure 10. Review Screen: Data section

Also, by default, all the data is checked to be imported into the linked order when you 

it.

Before accepting, however, you can review the data using the scroll bar on the right or by using the **Group** tree on the left.

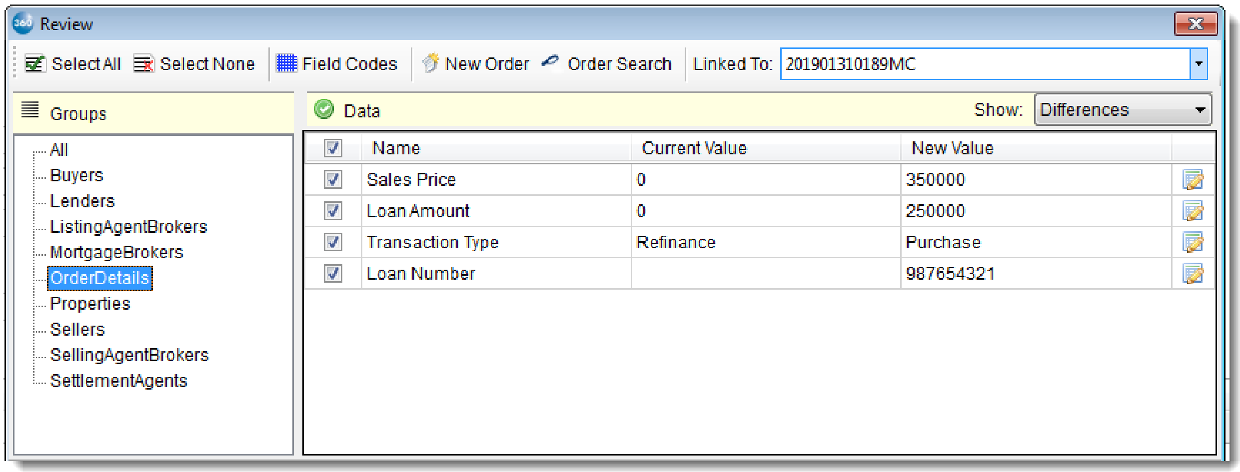


Figure 11. Review Screen: Group filter

Clicking the 

button adds a column to show the field code path for the field into which the New Value will be imported.

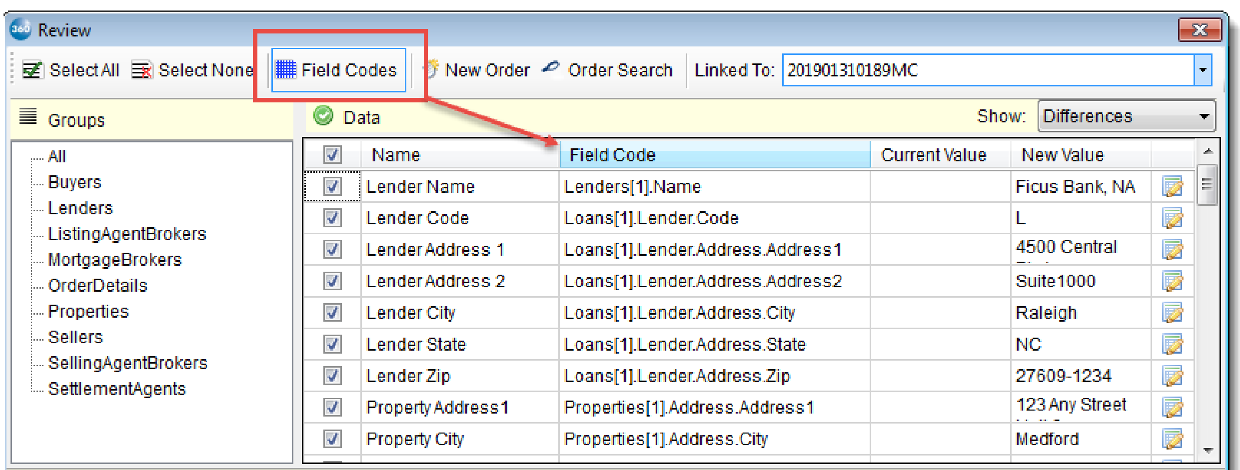
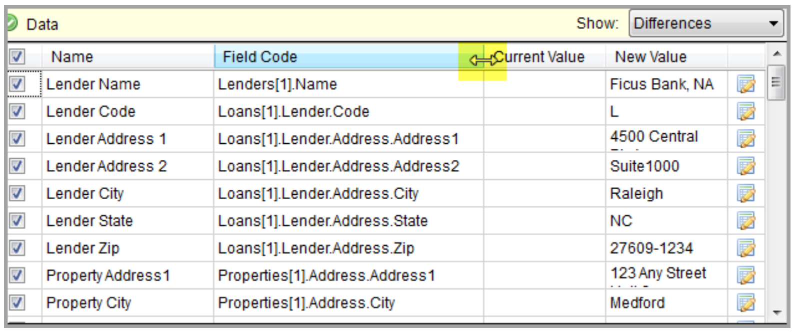


Figure 12. Review Screen: Field Codes

User Tip: Increase or decrease the column width to see the full Field Code path by hovering your mouse over the column line in the header. When your cursor turns into a double arrow, click and drag the column border as needed.



Message Section

The Message section of the Review screen shows the message or messages that have been sent to you and members of your organization as set up in Collaboration Center.

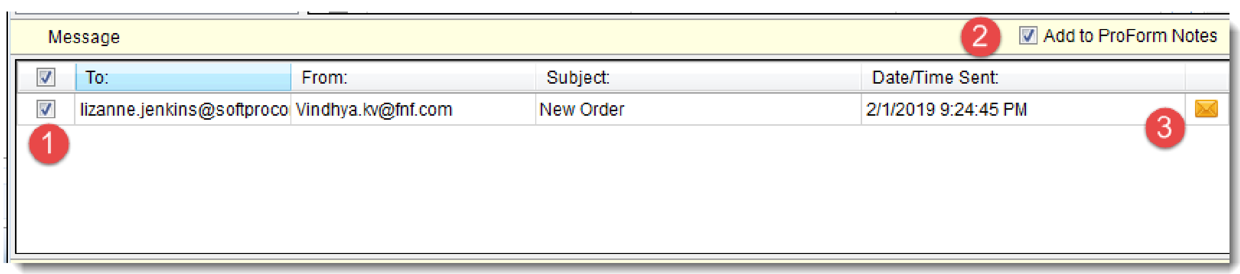


Figure 13. Review Screen: Message section

By default, the messages are selected (1) to be imported into Notes (2) in the linked order. You can uncheck messages individually (1) to not import specific messages into Notes, or uncheck the Add to ProForm Notes checkbox (2) to not import all messages into Notes.

Clicking on the icon (3) opens the message.

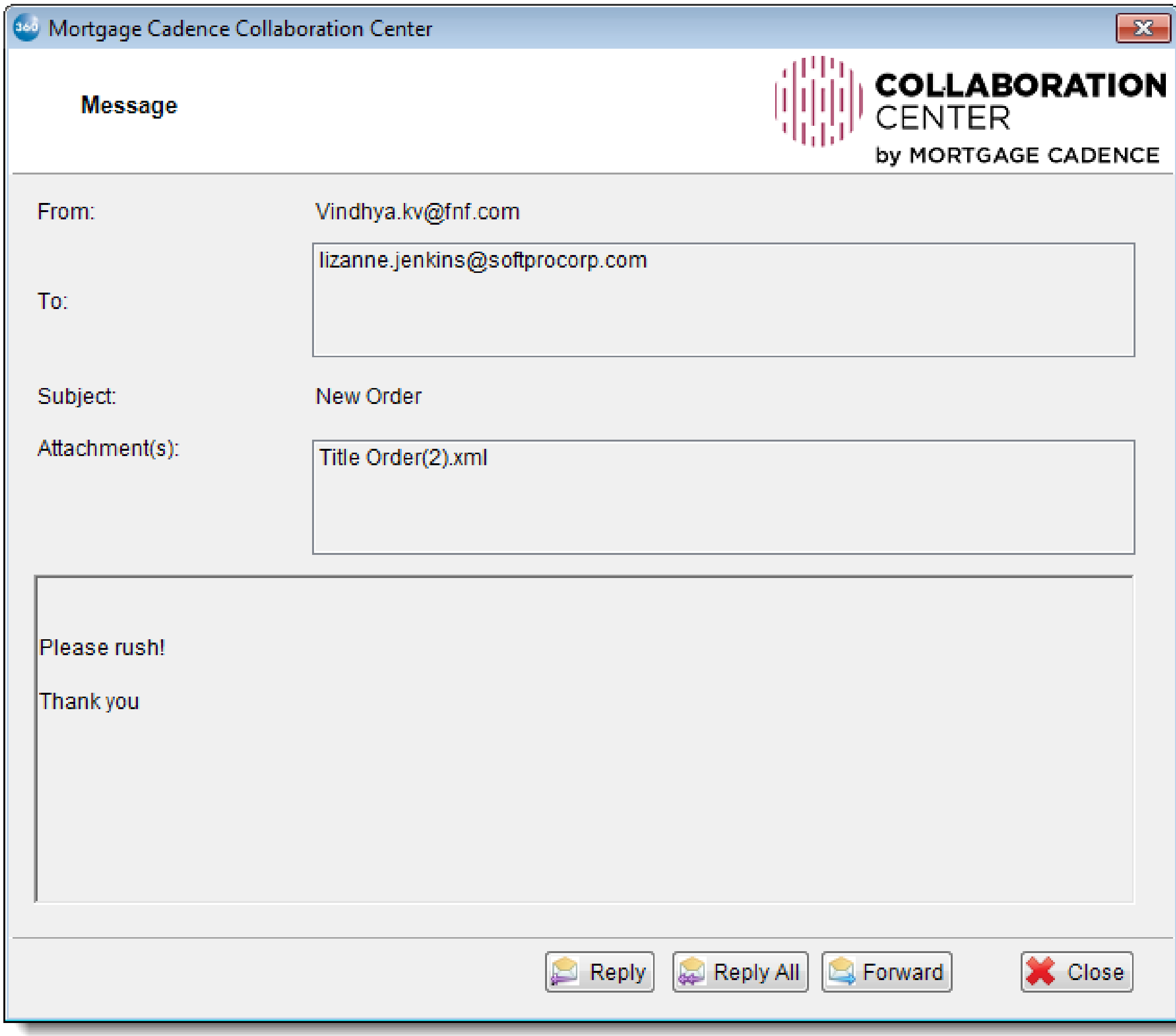


Figure 14. Message Screen

360 allows to you to Reply, Reply All or Forward the message in Collaboration Center before you have clicked Accept in the Review Screen. However, once you do so, Mortgage Cadence charges your organization for using Collaboration Center to receive the new order and messages through 360. Before proceeding with a message response, a warning Message will display:

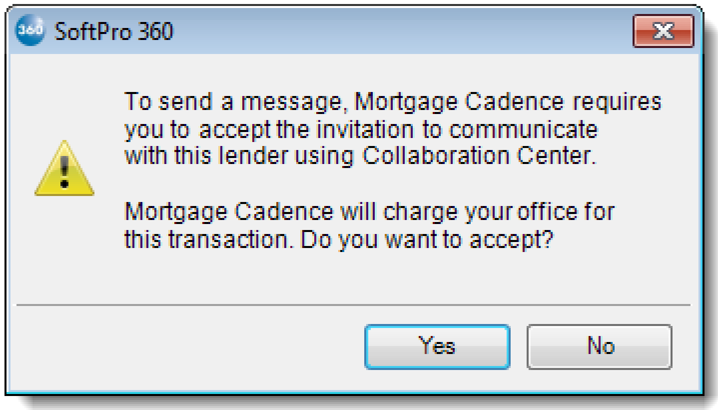


Figure 15. Warning: Mortgage Cadence charge

Clicking No, closes the warning message so that you can click Close to return to the Review screen. Clicking Yes opens a message screen where you can compose and send a response. Please see [Sending Messages](#) for more information on responding to a message.

Documents Section

For a New transaction, the Documents section of the Review screen displays the .xml document that contains the data displayed in the Data section. It will also display any other documents that the lender attached to the message. By default all documents are selected (1) for attaching to the linked order. Clicking on the View icon (2) opens the document in your default application for its document type. Clicking on the Copy icon (3) copies the document as an image and saves it to your clipboard.

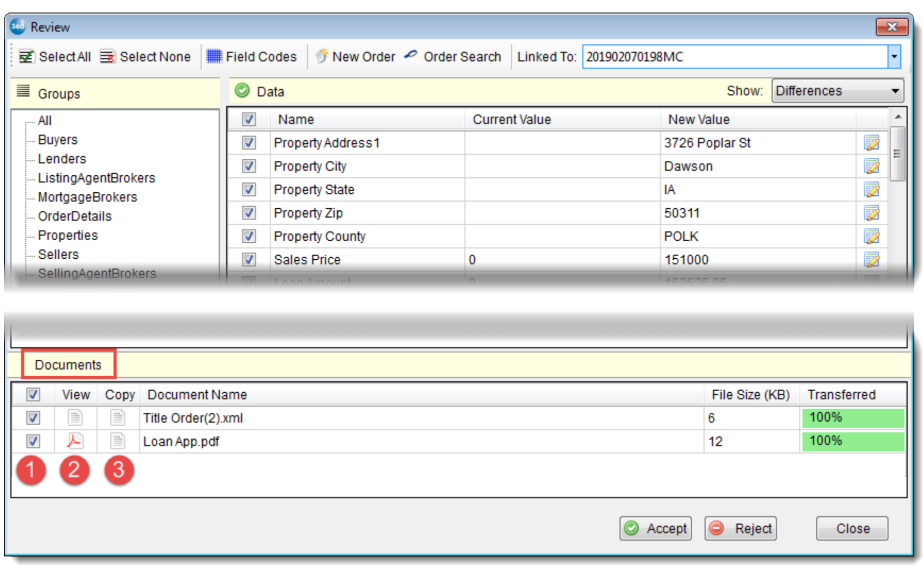


Figure 16. Review Screen: Documents

Accepting the New Order

To import the selected data, messages and documents into the linked order, click the Accept button. Once the importing has been completed, the Review screen will close and the transaction status will change to "In Progress".

Rejecting the New Order

To reject the order, click the Reject button. A warning message display will appear:

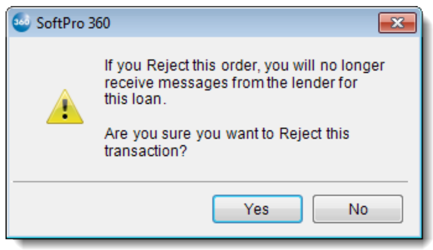


Figure 17. Reject: Confirmation Message

Clicking Yes sends a message to Collaboration Center that the order has been rejected. After the process has been completed, the transaction status will change to "Rejected."

Errors in the Review Screen

1. MISMO Error: This message may display while the Review Screen is downloading the data, messages and documents.

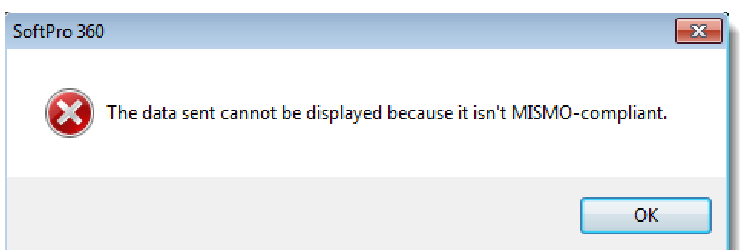


Figure 18. MISMO Error Message

The Title Order.xml sent with a new order request must be compliant with the MISMO, version 3.3. The Request File button in the Collaboration Center folder generates a MISMO compliant xml. Check with the lender to make sure this button was used to create the Title Order.xml document sent with the new order request.

2. No data is displayed in the Review Screen:

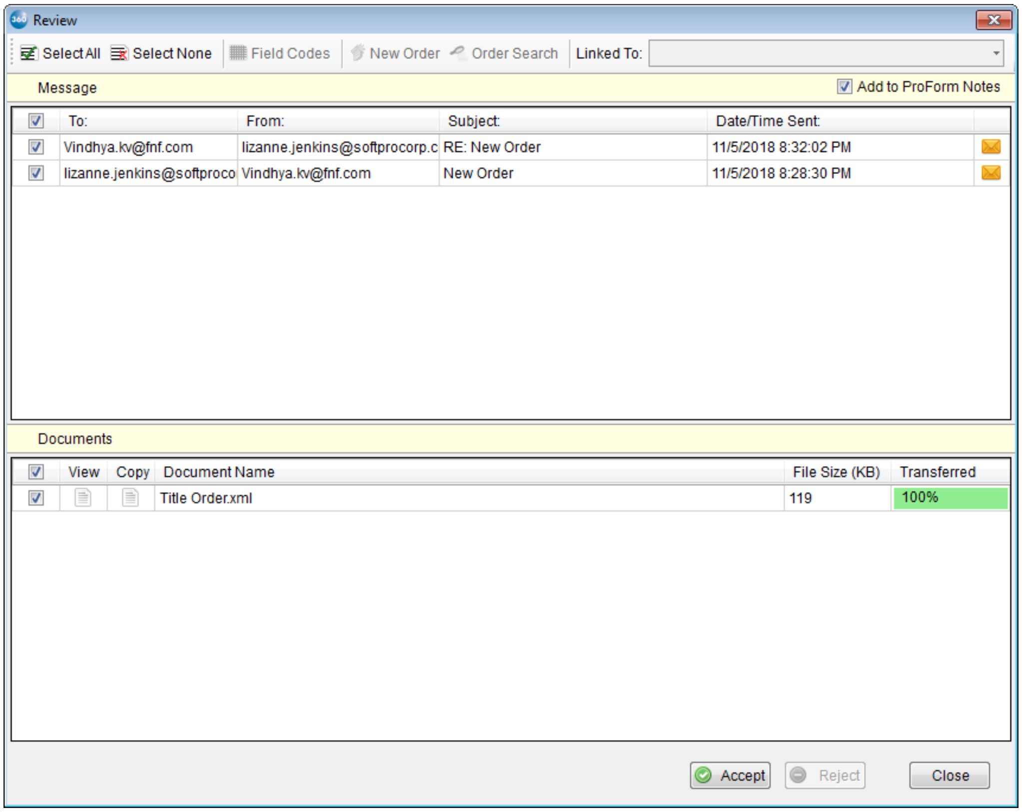


Figure 19. Review Screen: Missing Data

This can happen if the lender sends the Title Order.xml without the category "Title Order XML". Check with the lender to see if the attached xml had this category attached.

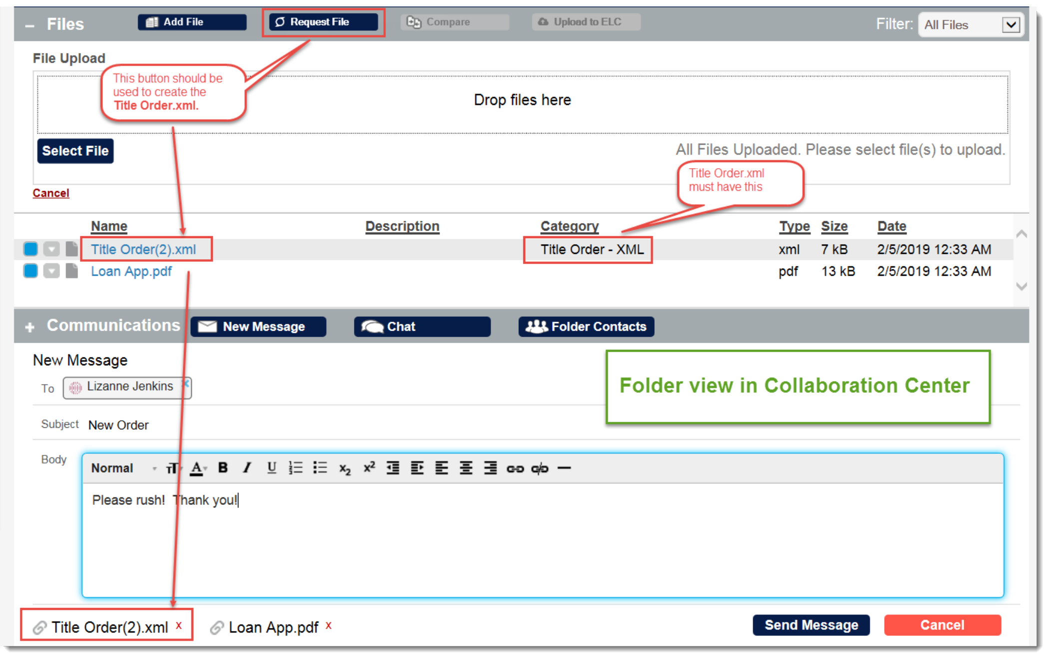


Figure 20. Collaboration Center: Folder Screen

Communicating with Lender

Sending a New Message

Select the transaction in the 360 Queue and Next Step, or double click on the transaction, to open the Summary screen.

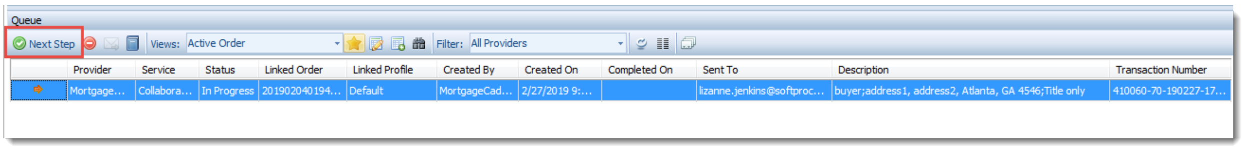


Figure 21. 360 Queue: Opening In Progress Transaction

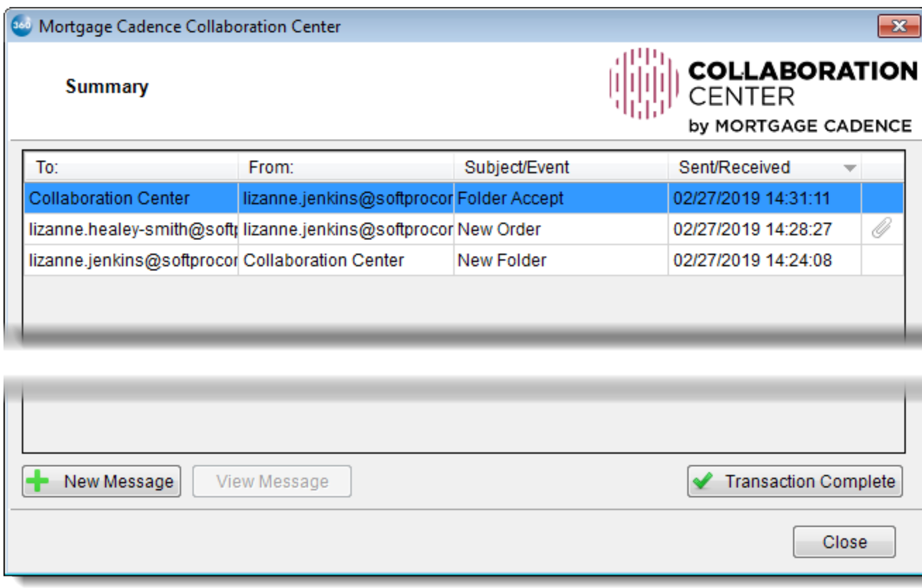


Figure 22. Summary Screen: New Message

Clicking New Message opens a New Message screen.

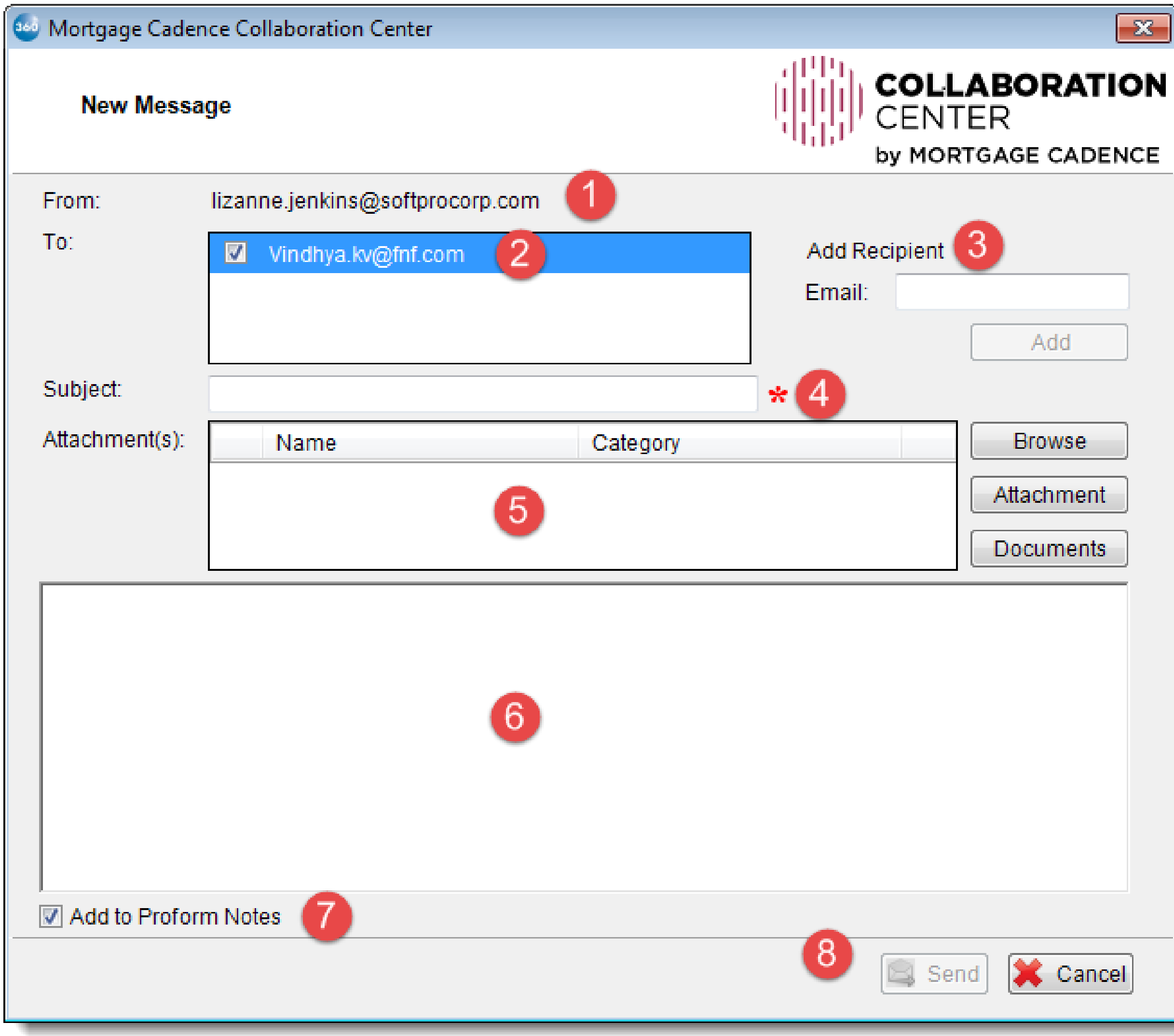


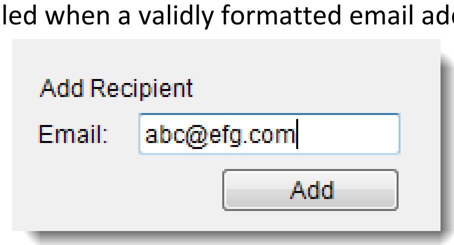
Figure 23. New Message Screen

(1) **From** is your 360 account email address.

(2) **To** section shows the email address(es) of anyone who has sent a message to 360 from Collaboration Center and are checked by default

(3) **Add Recipient** allows you to enter an email address that isn't already in the transaction. The 

button is enabled when a validly formatted email address is entered.



(4) **Subject** is required to send a message.

(5) Documents: You can add a document to the message.

a. Browse opens your desktop browser.

b. Attachment opens the a list of documents in the Attachments of your ProForm order, or if your order has a linked smartVIEW order, a screen with the smartVIEW folder tree and attachments will open.

c. Documents [Impact users only] opens the module for Impact document selection.

Adding a document displays the Collaboration Center document Category dropdown list. Selecting a Category is not required to send a Message.

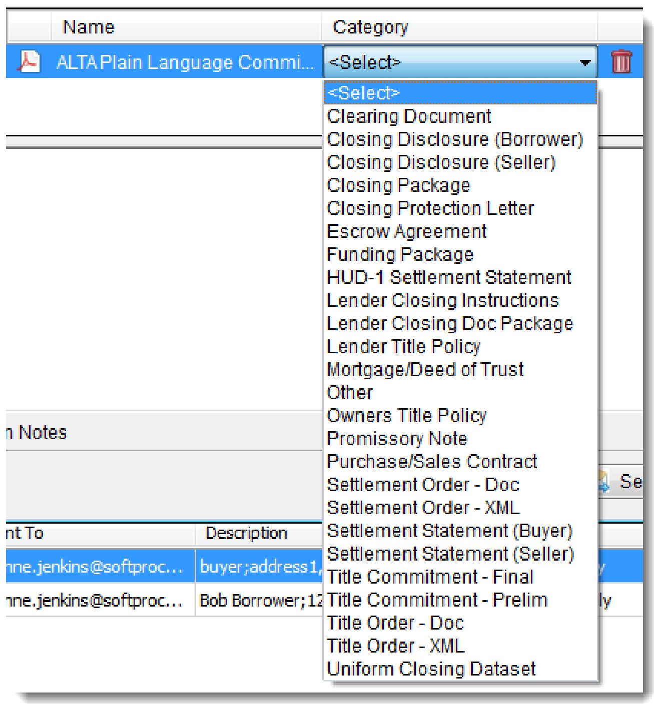


Figure 24. New Message Screen: Document Category

Clicking  deletes the document from the message.

(6) Message: You can enter a message in the text field using letters, numbers and punctuation marks. **Please note that image files, text formatting and special characters are not supported in this 360 service and may not appear in the message received in Collaboration Center or may cause unexpected data to be displayed.**

(7) Add to ProForm Notes checkbox is checked by default. This will send a summary of the message to the Order Notes when the message is sent.

(8) Send: The following conditions are required to enable Send:

a. A recipient has been checked in the **To:** section,

b. A **Subject** has been added, and

c. Either a **Document** has been attached, or a **Message** has been entered.

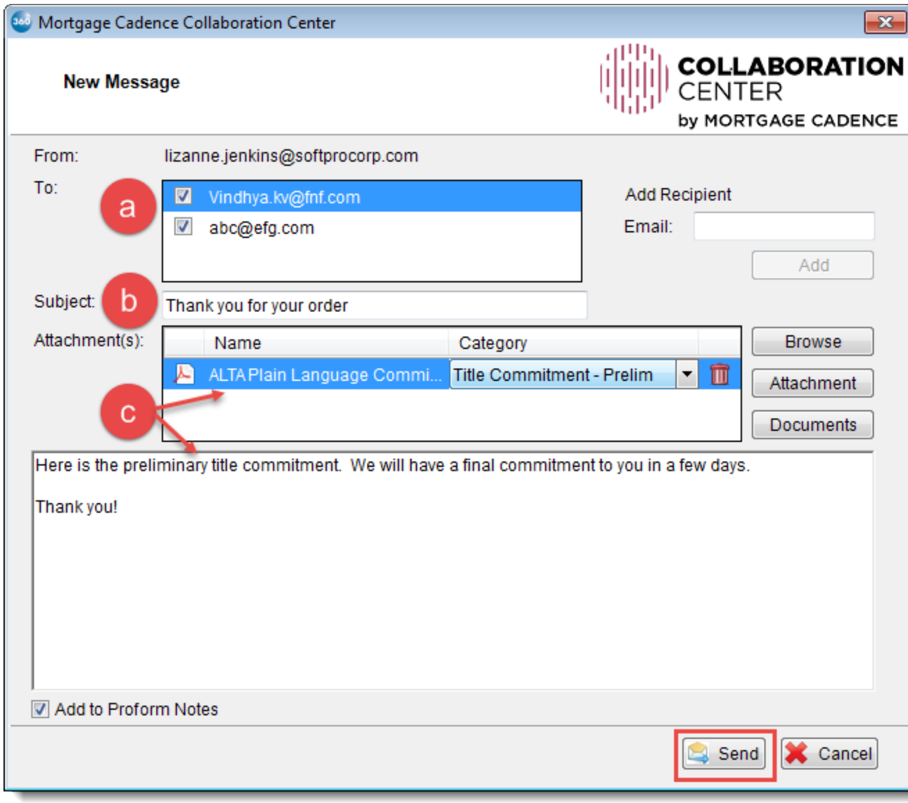
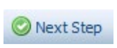
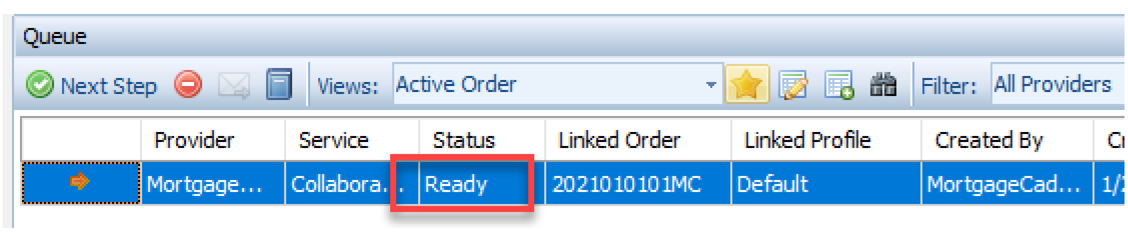


Figure 25. New Message Screen: Required Fields

Replying to a Message

When a lender sends a message, the transaction status in the 360 Queue changes to **Ready**. Clicking 

or double-clicking on the transaction, opens the Review Screen to display the message and any documents attached.



This opens the Review Screen where the new message will appear. Clicking on the yellow envelope icon will open the message:

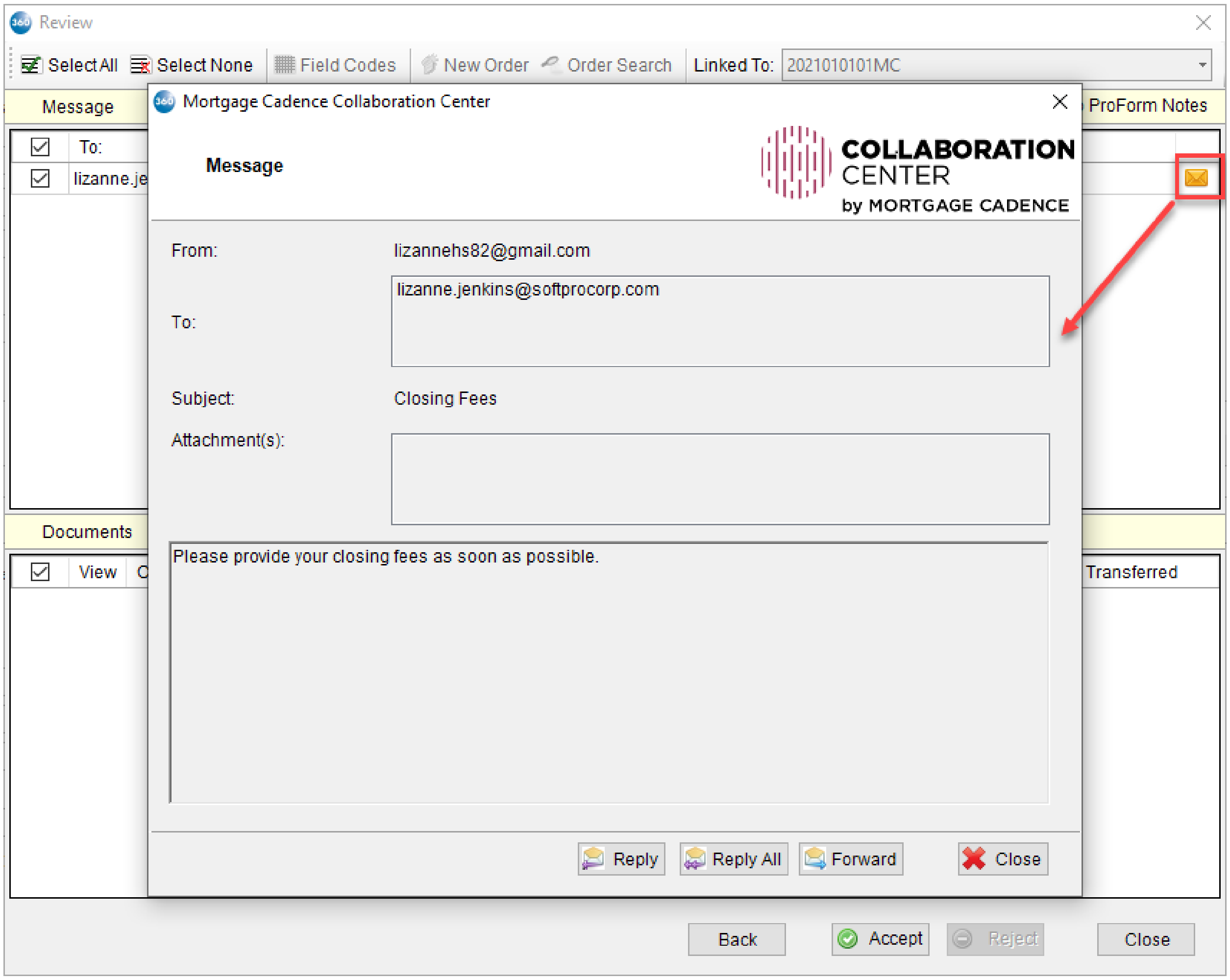


Figure 26. Opening New Message

Clicking **Reply All** will open a new **Reply All** message:

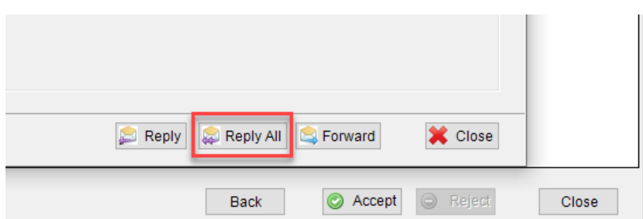


Figure 27. Reply All

From the **Reply All** message screen you can (1) add a Recipient on the fly, (2) attach documents and (3) add a message, then (4) **Send.**

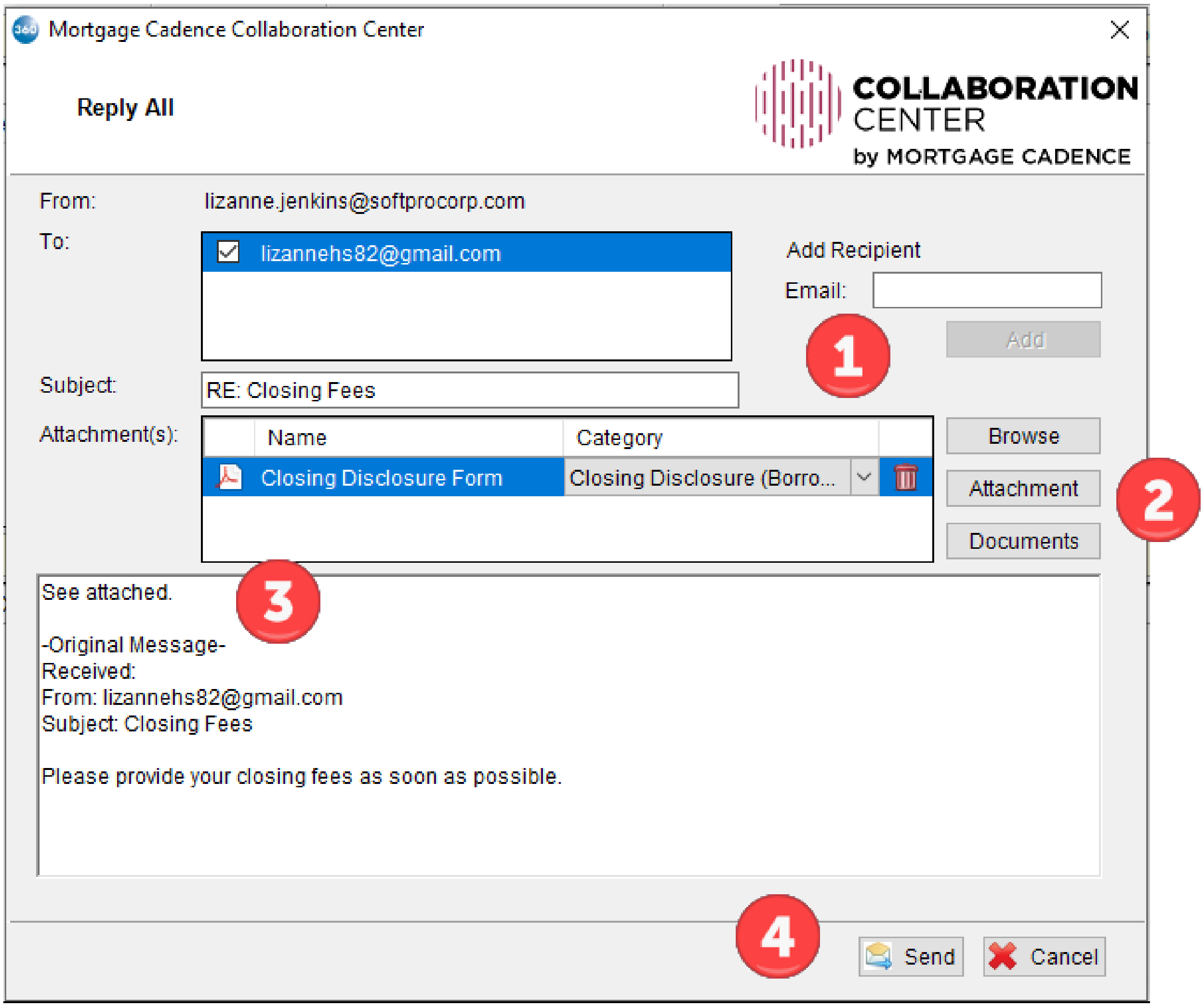


Figure 28. Reply All Screen

When **Accepted**, messages sent and received are recorded in the Order Notes.

Created	Last Modified	Note	Category
01/22/2021 02:27 PM	Default Admin Account	To : lizannehs82@gmail.com From : lizanne.jenkins@softprocorp.com Subject : RE: Closing Fees See attached. -Original Message- Received: From: lizannehs82@gmail.com Subject: Closing Fees Please provide your closing fees as soon as possible.	Integration
01/22/2021 02:27 PM	Default Admin Account	To : lizanne.jenkins@softprocorp.com From : lizannehs82@gmail.com Subject : Closing Fees Please provide your closing fees as soon as possible.	Integration
01/22/2021 02:18 PM	Default Admin Account	To : lizanne.jenkins@softprocorp.com From : lizannehs82@gmail.com Subject : New Order Please rush!	Integration

Figure 29. Order Notes

Summary Screen

Double-clicking on the **In Progress** transaction in the 360 Queue or clicking **Next Step**, opens to the **Summary** screen where you can (1) create a **New Message,** (2) view a previous sent or received message, and (3) mark a **Transaction Complete**.

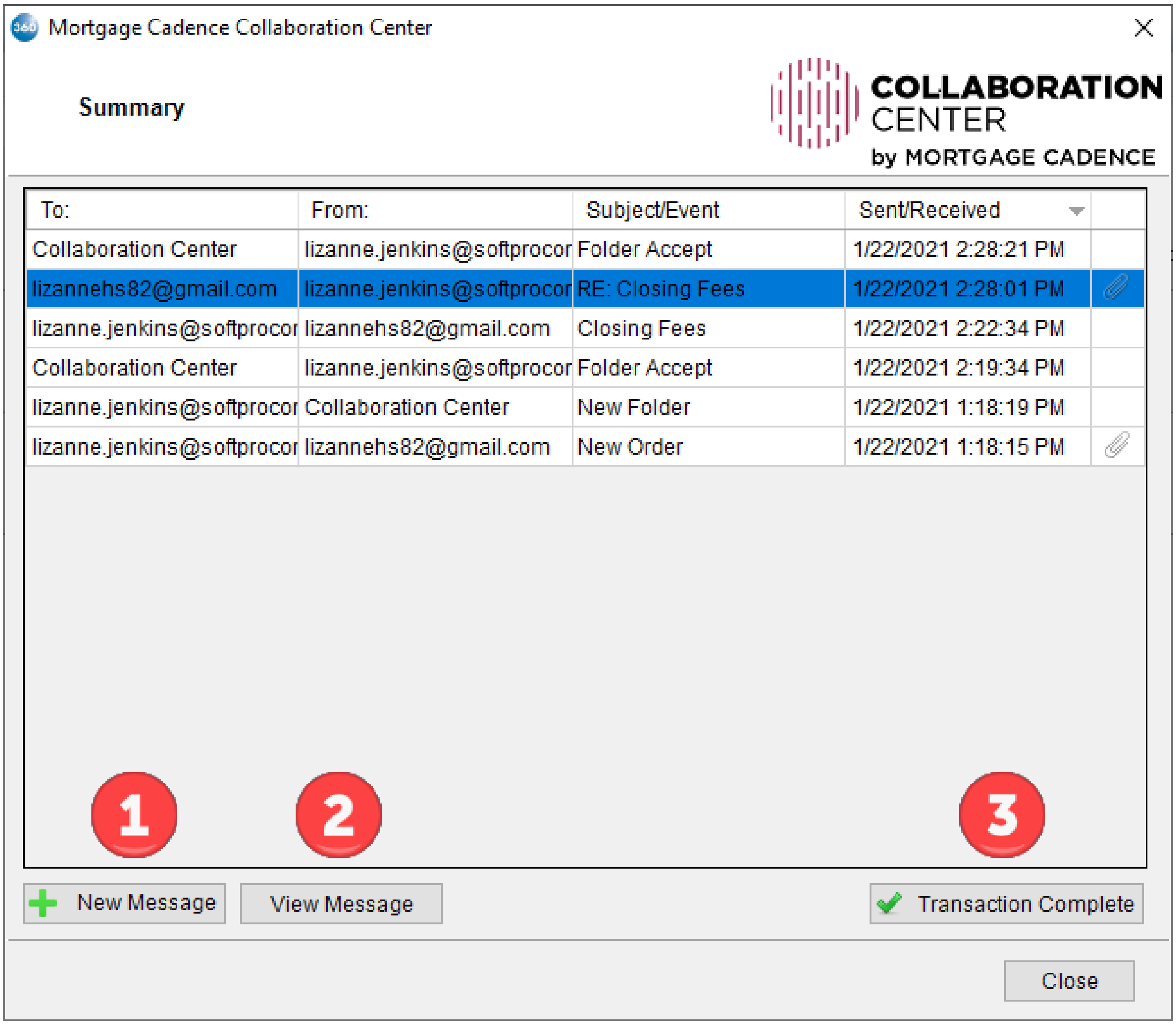
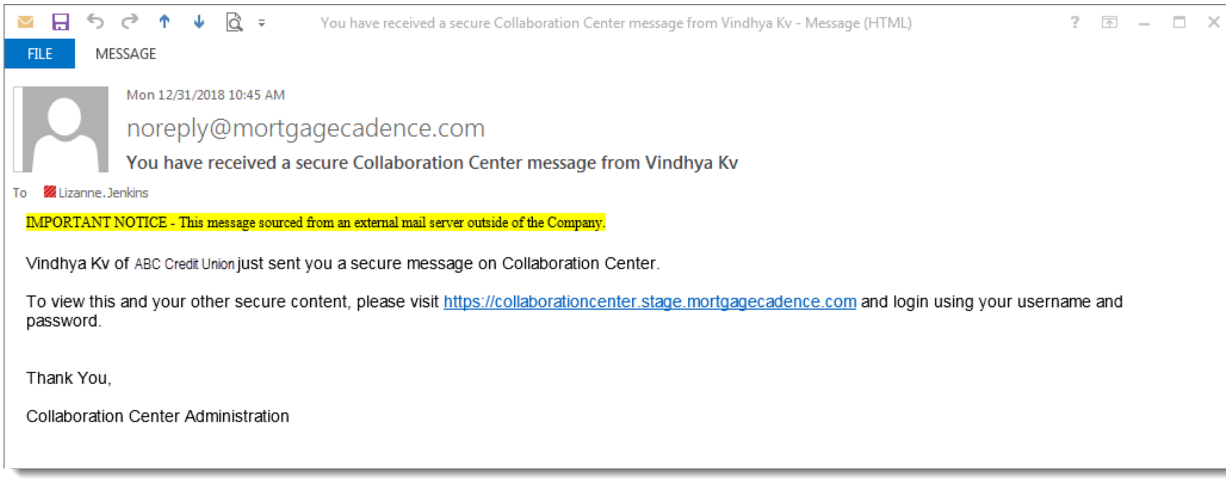


Figure 30. Summary Screen

Marking a **Transaction Complete** will end the life of the transaction so that the Summary Screen will no longer be accessible from the 360 Queue.

Appendix

Sample Email Notification from Mortgage Cadence


You have received a secure Collaboration Center message from Vindhya Kv - Message (HTML)

FILE MESSAGE

Mon 12/31/2018 10:45 AM

noreply@mortgagecadence.com

You have received a secure Collaboration Center message from Vindhya Kv

To Lizanne.Jenkins

IMPORTANT NOTICE - This message sourced from an external mail server outside of the Company.

Vindhya Kv of ABC Credit Union just sent you a secure message on Collaboration Center.

To view this and your other secure content, please visit https://collaborationcenter.stage.mortgagecadence.com and login using your username and password.

Thank You,

Collaboration Center Administration