

CLOSESIMPLE + SOFTPRO

AN INSIDE LOOK AT THE INTEGRATION
[WHITE PAPER]

Paul Stine
Co-Founder

CloseSimple
215 Kentucky Ave S
Minneapolis, MN 55426

612-743-4453
www.closesimple.com
paul@close-simple.com

close-simple™

TABLE OF CONTENTS

Why CloseSimple Exists	1
CloseSimple + SoftPro Overview	2
How CloseSimple Integrates	3
Features	4
Texting with CloseSimple & SoftPro	5
Emailing with CloseSimple & SoftPro	7
SoftPro and the CloseSimple Client Portal	8
Implementation Process	9
Administering your Program	10
1CloseSimple vs. SoftPro Task Notification	
Tool (TNT) vs. SoftPro Live	11
More Questions & Next Steps	12

WHY CLOSESIMPLE EXISTS

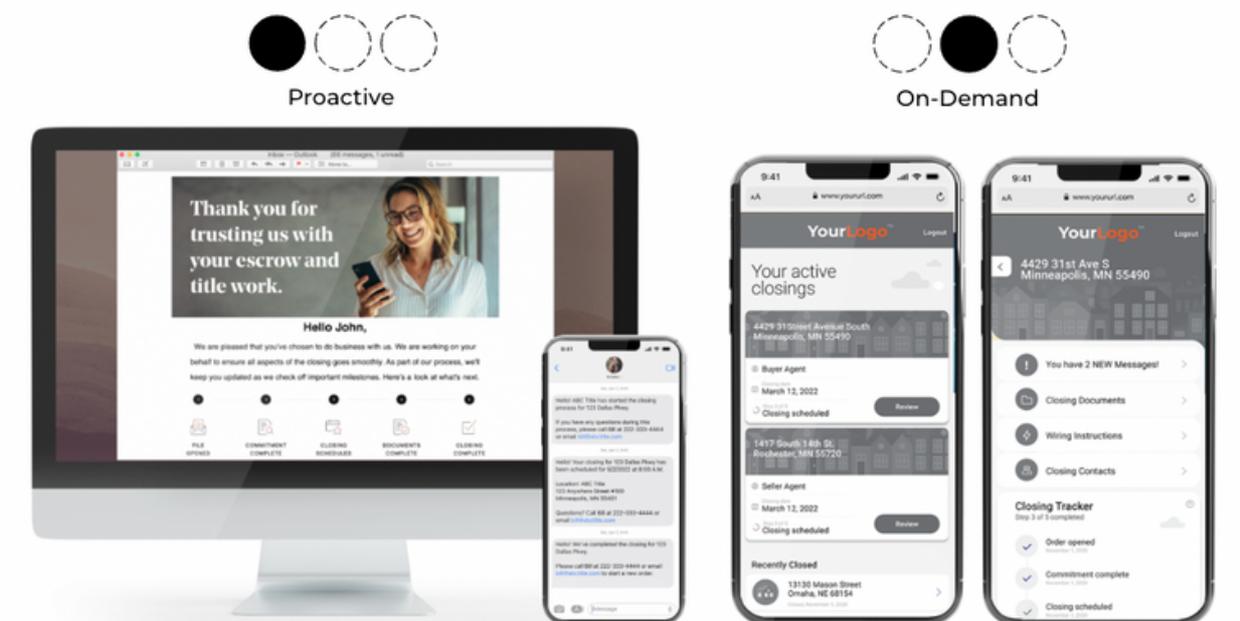
One of biggest complaints at the end of any real estate transaction is the lack of communication. This is particularly true once the purchase agreement is in place and the transaction moves into the closing process. Why? Because it's really hard to provide a seamless, well-communicated closing experience, keep ALL of the parties (Buyers, Sellers, Realtors, Lenders, Attorneys, etc.) in the loop, and do it at scale across every order.

In an attempt to keep service level high, most Title/Escrow Companies and Real Estate Attorneys end up resorting to a reactive customer experience strategy that results in their Escrow Staff and/or Paralegals answering the phone and email all day long, jumping from status update request to status update request. In short, it becomes extremely reactive.

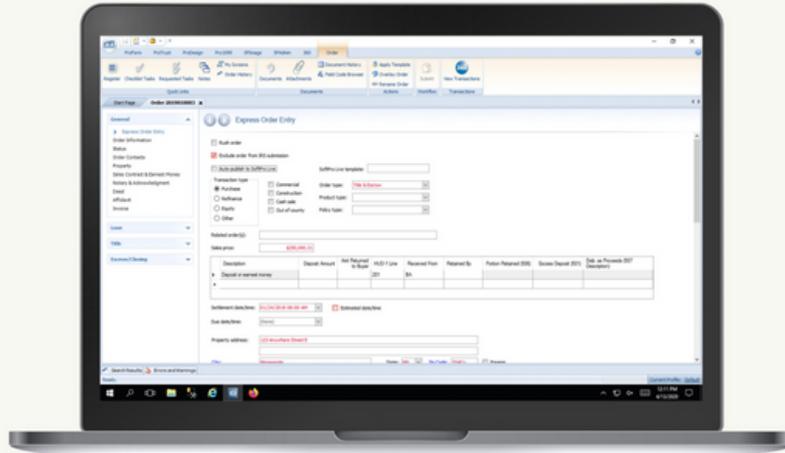
At CloseSimple, we help our client shift into a communication strategy that focuses on proactive communication and on-demand solutions for all parties:



The result is a comprehensive digital solution that integrates tightly with SoftPro to deliver Proactive Email & Text message updates, a branded, on-demand Client Portal, and of course, The Pizza Tracker for Title®



CLOSESIMPLE + SOFTPRO OVERVIEW



SoftPro launched the CloseSimple SoftPro 360 integration in March of 2019. Since then, hundreds of thousands of orders have been processed, helping countless buyers, sellers, real estate agents, and lenders stay better connected.

Let's take a look at how CloseSimple helps title and escrow companies on SoftPro communicate during the closing with automated text messages, customized / branded emails, the Pizza Tracker for Title™ timeline, and our Client Portal.

“

I was looking for a solution to streamline the process & track the progress of a file for clients. CloseSimple did both.



Shonna Cardello

President

White Rose Settlement Services, Inc.

HOW CLOSESIMPLE INTEGRATES

CloseSimple is a full SoftPro 360 integration & can be utilized in 2 ways:

1. Automated

The vast majority of CloseSimple clients who utilize the SoftPro integration use it in a fully automated configuration. Because CloseSimple utilizes a 360 integration, it can use a simple automation process that triggers off task completion, file status, document upload, or anything built-in to the native SoftPro automation processing.

Pros: Adoption is immediate & consistent (regardless if you're currently utilizing tasks or automation. Many of our customers were not utilizing ANY automation prior to working with us) and it's super easy for users.

Cons: Less control for users in terms of customizing the content that's being delivered. However, our capabilities to customize the communications even in a fully automated setup continue to evolve, and perhaps more critical: in today's market, speed and accuracy reign supreme.

2. Manual access through SoftPro 360 Services.

If you're currently using the SoftPro Standard or Enterprise platforms, you'll need to use CloseSimple manually. The other scenario in which a client may choose "Manual" is if the escrow staff requires the ability to edit messages before they are sent.

Pros: Many escrow officers & processors like to "be the ones who hit send," and have more control over their communications. The CloseSimple interface, accessible through SoftPro 360 Services provides that control.

Cons: Requires the user to think, and usage isn't as controllable from a management perspective.

See a full video overview of the CloseSimple + SoftPro integration at closesimple.com/softpro

FEATURES

Pricing

- Unlimited Monthly Orders included in all pricing tiers
 - Unlimited Monthly Emails included in all pricing tiers
 - Unlimited Texts included in all pricing tiers
- (see pricing at closesimple.com/pricing for more details)

User Experience

- Full Automation through the 360 platform
- Access to the CloseSimple Admin Platform to easily edit your CloseSimple program

Integration-specific information

- Contacts integration: includes standard contacts from “Order Contacts” (meaning no double-data entry for recipients)
- Email integration: integrates seamlessly with Exchange, Office 365, and Gmail to send email directly through your email platform.
- Email encryption integration: CloseSimple integrates with most email encryption services
- Attach & send documents: easily send documents from SoftPro to your recipients

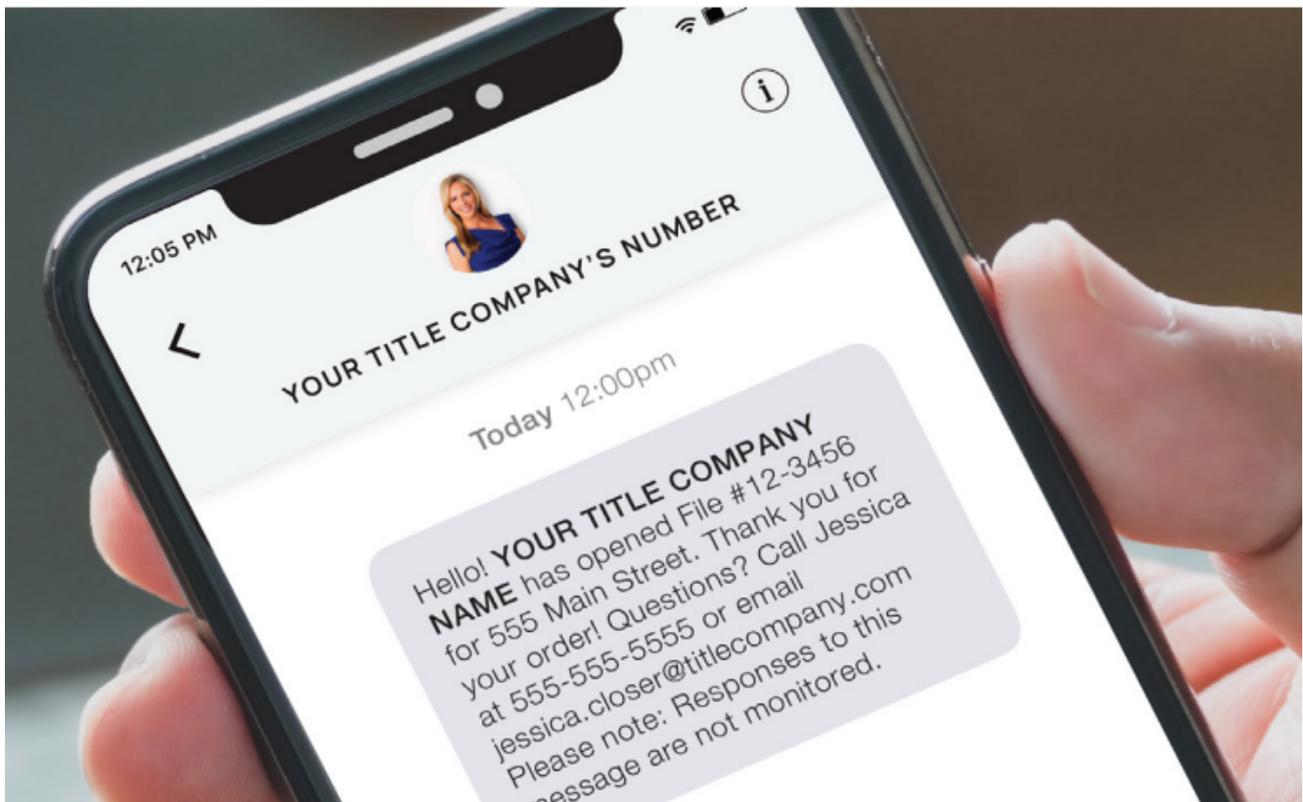
TEXTING WITH CLOSESIMPLE & SOFTPRO

In 2017, CloseSimple introduced the title industry to text messaging, creating the first ever integrated text platform sending text message notifications.

Then, in 2020, after sending hundreds of thousands of texts to keep people connected, we started integrating two-way texting solutions. Both are great options for title companies and work great with SoftPro, although we strongly recommend the one-way text messaging solution for any title company that is starting to use text messages during the closing process.

Our 2-way Texting Integrations include:

- Quiq
- Ring Central
- Text Request
- Kenect



One-Way Texting vs. Two-Way Texting

- **Notifications (one-way):** One-way texting is great because it gives you the benefit of texting without adding any administrative/operational strain to your business.

Think of this like the text that you get from your doctor or dentist.

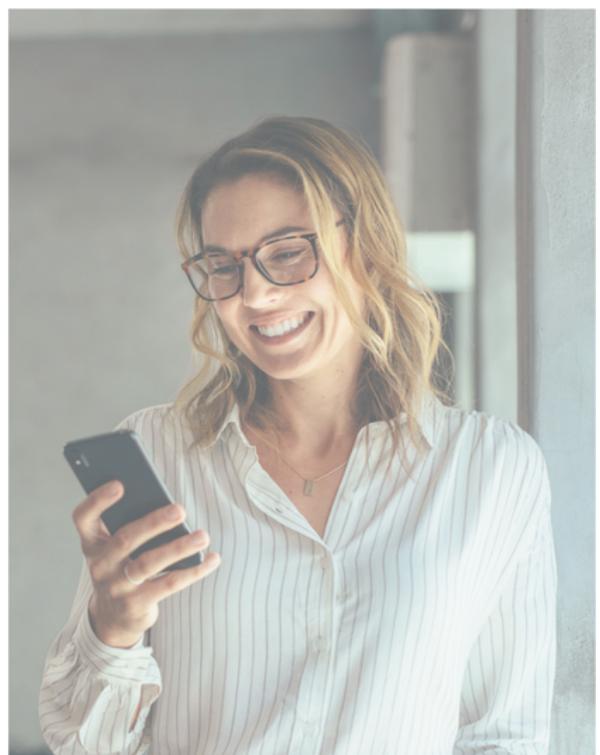
It is simply a notification or reminder about something coming up because you would call if you had any specific questions.

With the one-way text messaging your team will continue on like they always have, but with the ability to text customers because text messages naturally pierce through people's phones, ensuring your Realtors DID get that update.

- **Notifications + Two-Way Conversation:** Adding on the CloseSimple 2-Way texting to your implementation means not only that can you take advantage of texting from SoftPro, but you can continue on the conversation, providing a quick and easy way to get information from all of your different customers.

While this add-on requires a bit more shift in how your escrow staff is doing business (you will need to identify who will be replying and expectations on how long is an acceptable for each reply), it's an easy platform to implement and use.

See more at closesimple.com/texting



EMAILING WITH CLOSESIMPLE & SOFTPRO

ABC TITLE
EXPERTS OF MINNEAPOLIS



Thank you for trusting us with your escrow and title work.

Hello John,

We are pleased that you've chosen to do business with us. We are working on your behalf to ensure all aspects of the closing goes smoothly. As part of our process, we'll keep you updated as we check off important milestones. Here's a quick look at what's coming up next.

● ● ● ● ●

FILE OPENED COMMITMENT COMPLETE CLOSING SCHEDULED DOCUMENTS COMPLETE CLOSING COMPLETE

As we get started, we'd appreciate it if you took 2 minutes to watch this important video on wire fraud. We'll work together throughout the closing to ensure all funds end up in the right hands. Just remember that we will never ask for a change in wiring instructions leading up to the closing. Update me when you are done!



We encourage you to contact us at any time with questions or concerns you may have about our services, title insurance or the closing process. Thank you again for putting your trust in us.



Bill Svoboda
Co-Founder
bill@closeimple.com
612-805-4080
closeimple

While texting is the hot new thing, emailing continues to be necessary. It'd be pretty hard to explain an entire closing process just in text messages, and sending documents will always be needed. CloseSimple takes the security of your information very seriously, and has implemented an email delivery strategy that reflects that.

Here's our approach to email:

- **Integrate with your email platform:**

Tying into your Office 365, Exchange, or Gmail account ensures that your communications come from your domain

- **One point of connection:**

We keep things simple and secure with one entry point

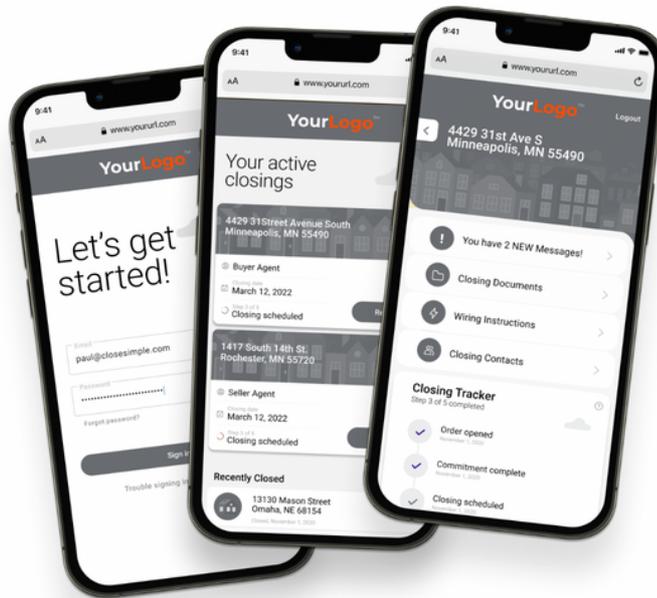
- **Your encryption service:**

Because we're tying directly into your email platform, we can pick up your existing encryption policies

- **Emails can be beautiful:**

We believe your communications are an amazing opportunity to showcase your brand, and we'll help you look amazing!

SOFTPRO + THE CLOSESIMPLE CLIENT PORTAL



Client Portal Overview:

The CloseSimple Portal provides one, easy-to-access location for your clients to get a full snapshot of what's happening on every transaction they're currently working on, and also those that have closed. Features of the portal include:

- Facial recognition for easy access
- Secure Messaging
- Secure Document Sharing
- Secure Document Requesting (take a picture and upload it directly to SoftPro)
- Secure Wiring instructions delivery
- Visibility to all Closing Contacts
- Status Tracker
- Closing Information

The Client Portal Integration with SoftPro:

The Client Portal utilizes the same full automation capabilities as the Email and Text notifications. Updates get added to the portal right alongside the email and text message updates. (See page 3 for more details on automation)

IMPLEMENTATION PROCESS

With a name like "CloseSimple," it better be simple, or we named it wrong. A typical onboarding takes 2-3 weeks, requires 3 Zoom calls and is led by a dedicated CloseSimple team member.



“

After receiving our email & text message updates, one real estate agent said they make 75% fewer calls to our Escrow office than other ones they work with ... with the help of CloseSimple I'm sure we will eventually get 100% of their business soon!"



Brynne DesMarteau-Ray
Escrow Operations Manager
Affirmative Escrow

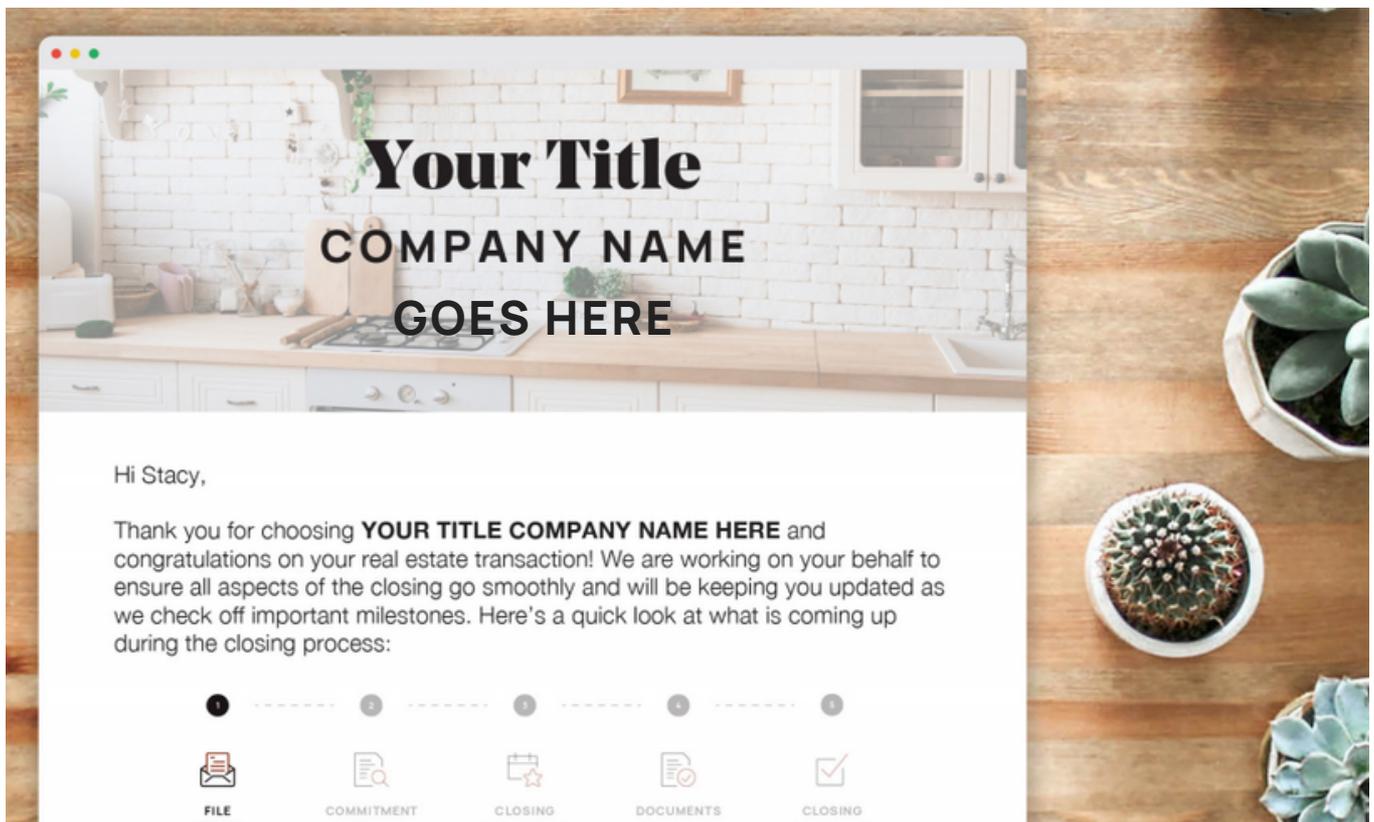
ADMINISTERING YOUR PROGRAM

While CloseSimple will hold your hand throughout the implementation process to design all of your program graphics and written content, you will also have access to our proprietary admin platform to self-manage your program.

And don't worry, our support team is always available at support@close-simple.com if you ever need help or have questions.

As part of your program, you will have full control over:

- Managing your graphics
- Managing your timelines (purchase, REFI, cash purchase, commercial, etc.)
- Managing your portal
- Managing text & email content
- Managing text & email recipients
- Configuring document attachments
- Managing your users



CLOSESIMPLE VS SOFTPRO TASK NOTIFICATION TOOL (TNT) & VS SOFTPRO LIVE

CloseSimple, SoftPro Live, and SoftPro Task Notification Tool all give you good options for delivering automated communications, documents, etc.

Here's a breakdown of some of the features of each platform:

	CloseSimple	SoftPro TNT	SoftPro Live
Task-driven Automated Email	✓	✓	✓
Deliver Documents	✓	✓	✓
The Pizza Tracker for Title [®]	✓		
Polished, branded emails	✓		
Text Messaging	✓		
Two-Way Text Messaging	✓		
Portal Access for Doc Sharing	✓		✓

One of the biggest differences between the SoftPro built-in options and CloseSimple is the implementation. CloseSimple is very unobtrusive to your existing setup. For most implementations there will be little to no impact to your current SoftPro setup.

Additionally, the CloseSimple onboarding team assigned to your onboarding will complete over 90% of the work to get you rolled out, including building and testing all of your automation processes.

MORE QUESTIONS OR NEXT STEPS

We'd love to answer them. Please contact paul@close-simple.com to discuss any integration or technical related questions.



Paul Stine
CloseSimple Co-Founder
612-743-4453
paul@close-simple.com