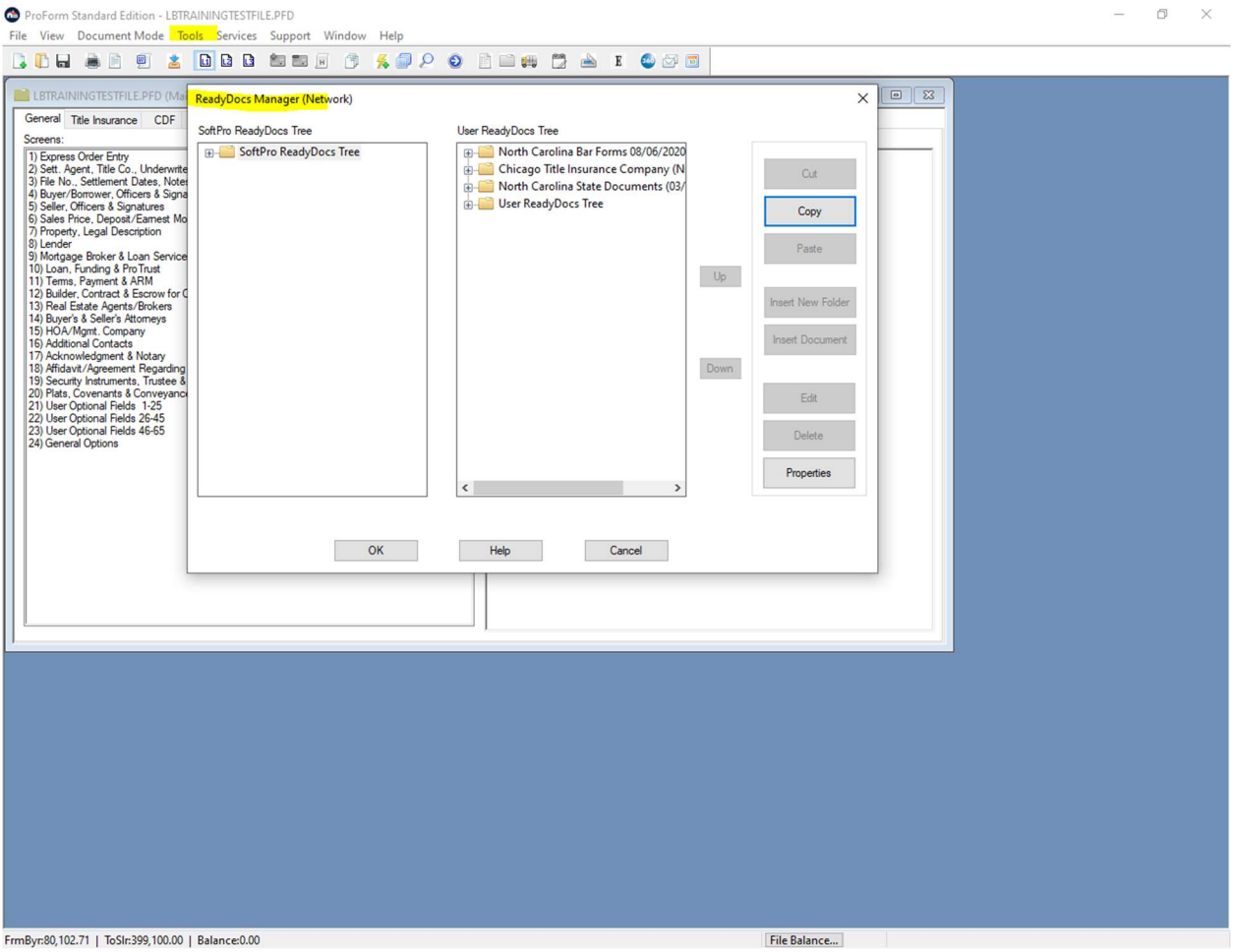
SoftPro Tips
Updating User Ready Docs Tree
Chicago Title-October 2023

The goal of this SoftPro tip is to help you organize the SPECIFIC documents your office normally disseminates for a particular type of transaction-Purchase, refinance, commercial, cash sale, etc. Rather than having to dig through all the folders and documents available in the program, this should be a big time saver when printing a closing package, emailing it, e-signing, etc.

Steps:

- Open ProForm
- Open any file
- Go to the top tool bar
- TOOLS
- Then, ReadyDocs Manager
- The left side is the structure of the SoftPro ReadyDocs Tree
- The right side is your current documents tree setup



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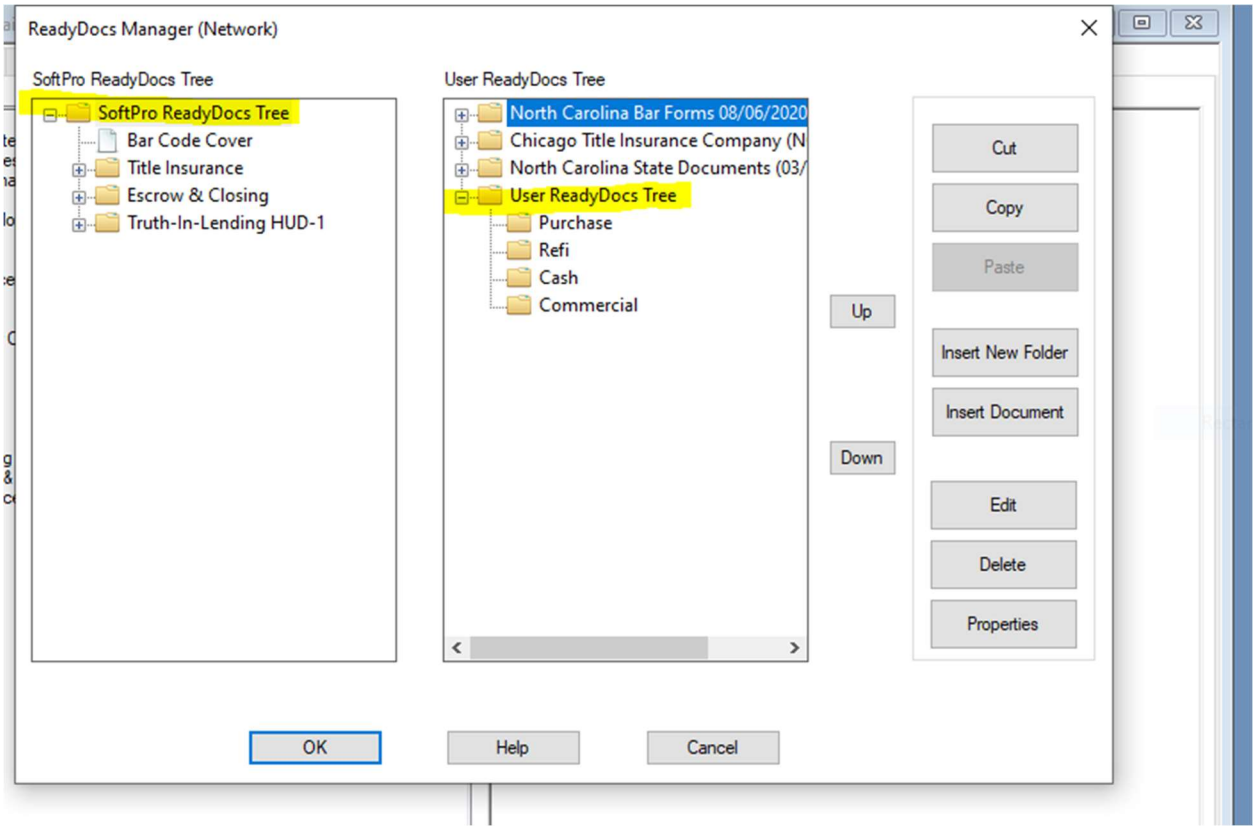
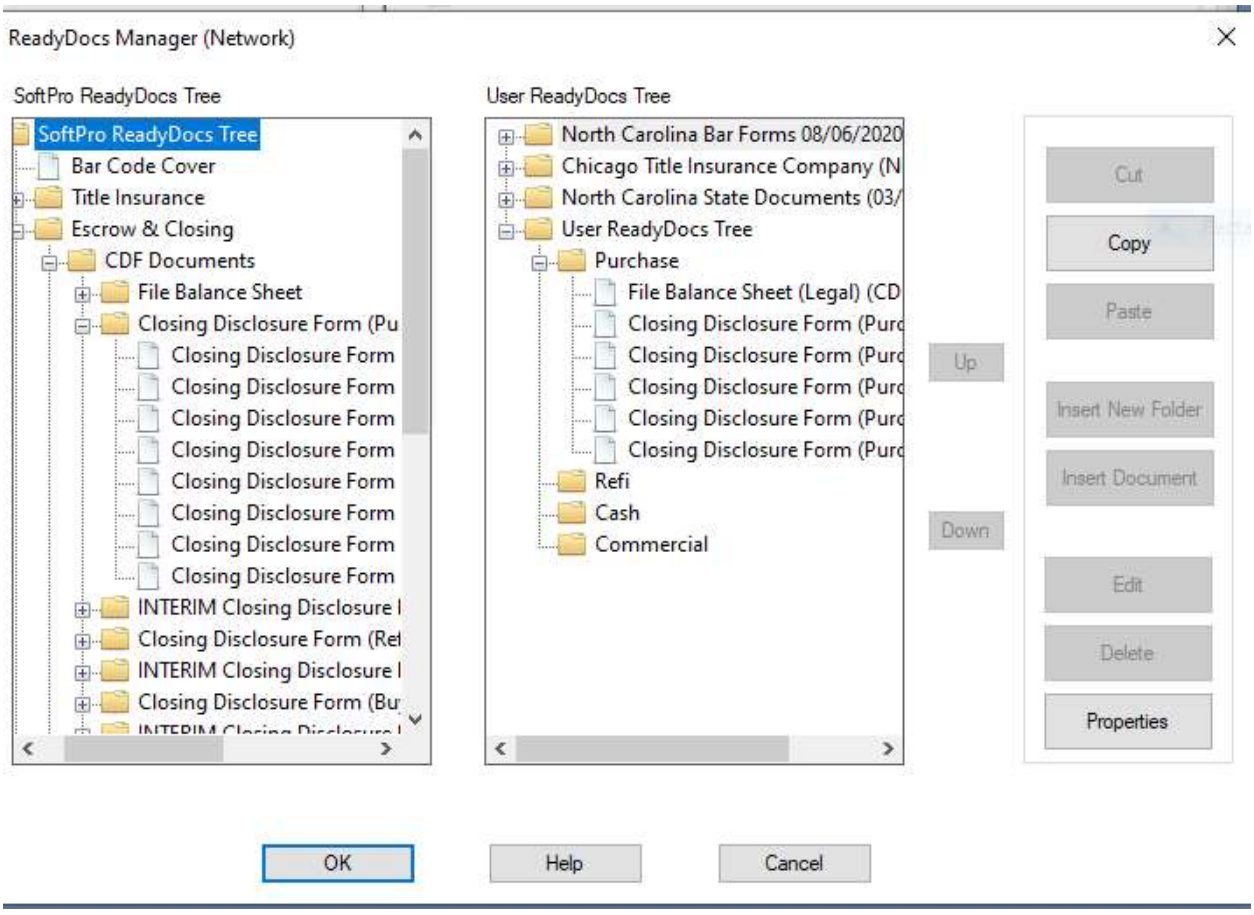
- Expand the USER READYDOCS TREE- this Is how you can organize your documents, versus the SoftProReadyDocs tree with thousands of documents included with the program
- A few folders are shown as examples
- Select INSERT NEW FOLDER and EDIT to give it the name you want, and move it UP and DOWN in the tree where it is most convenient for you.



- Once you have the structure of the tree in-place, select documents from the SoftPro ReadyDocs Tree on the left by expanding the folders, and dragging and dropping them into the correct folders
- Select UP or DOWN to move the documents where you want them in the folder
- In the example below of a purchase folder documents include all pages of the CD and a disbursements summary. You might need the ALTA Master Settlement Statement, etc.
- To start, list the documents you usually need when you print or email the closing package for each particular type of transaction. Create the structure of the tree and fill one folder to start. ***Select OK before exiting to save changes.***

- The structure of the tree will be shared between all users. Users can create folders In their name if they want something only they normally need.



- To see how much of a time-saver this will be, select PRINT from the top tool bar
- Either print or print to PDF (or select SoftPro PDF995 as the printer, which will also render the documents as a PDF)
- From the documents folders on the left side of the screen, select the folder to print (ie: Purchase)
- Drag and drop the folder to the right side of the screen or use the arrows to move it over
- Use the arrows to move it back if you selected the wrong folder
- Select OK. A box will pop-up to select the appropriate printer