

Westcor – Title Search User Guide

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Introduction

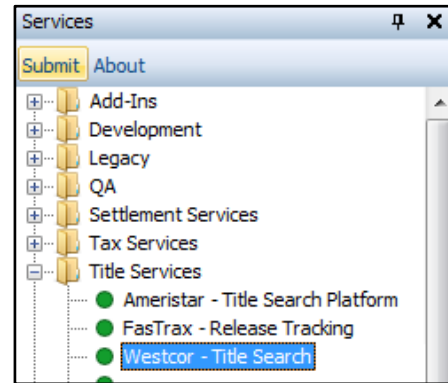
The Westcor Title Search Integration with SoftPro 360 automates the delivery and receipt of the following products:

- **TSR/Respa Commitment**
- **Commitment – NON-RESPA**
- **Refinance**
- **Ownership and Encumbrance (O & E)**
- **Foreclosure Commitment**
- **Foreclosure Report**
- **Plat Search**
- **Modification Update**
- **Miscellaneous**
- **Ownership Only**
- **REO Commitment**
- **Commercial Commitment**
- **Express Commitment**

Launching Westcor

Access from the 360 Services Menu

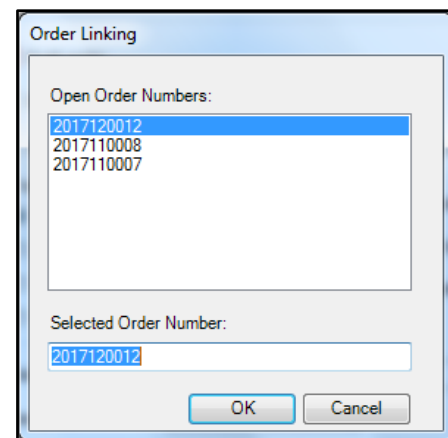
From the **360 → Services** menu, double-click **Westcor – Title Search** located under the Tools folder. This will open the Order Linking screen



Order Linking

From the **Order Linking** screen, select the ProForm order to be sent to Westcor

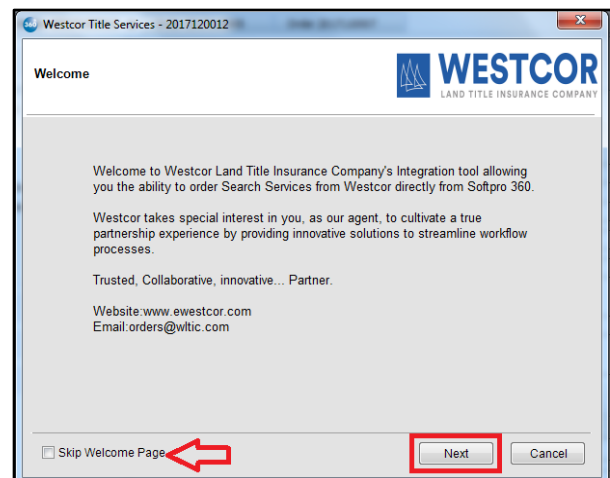
All orders that are currently opened will be listed in the Open Order Numbers pane. The selected Order Number field will populate with the current active ProForm order. You may select an order from any of the open orders, or you may choose to overwrite the Selected Order Number field with an order that is not currently open. Once you have confirmed an order to link, click **OK** to continue to the Welcome screen.



Welcome

From the **Welcome** screen, click **Next** and go to the Login screen

Click the **“Skip Welcome Page”** checkbox to bypass this screen during future sessions.



Logging In

The **Login** screen requires you to enter a **valid username** and **password**. Check **“Remember Me”** to log in automatically when you launch the product in future sessions. Click **Login** to continue to the Issuing Office screen.

Issuing Office

After clicking **Next** on the Login screen, you will navigate to the Issuing Office screen where you can view and select an agency for the ProForm order you selected.

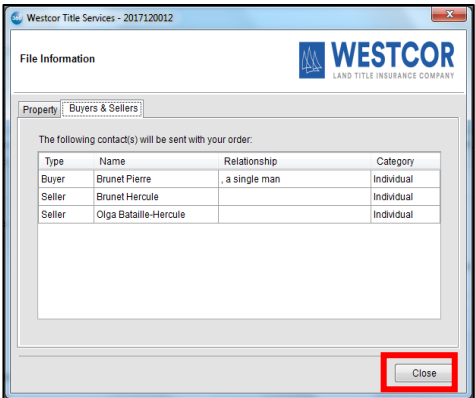
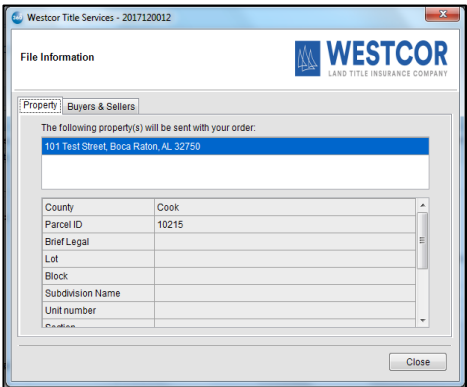
| Number | Name | Address |
|-----------|----------------------|--|
| IP1003.01 | SoftPro Title Agency | 300 South Orange Avenue ORLANDO, FL... |
| IP1003.02 | SoftPro Abstracting | 230 North Broad Street Philadelphia, PA 1... |
| IP1003 | SoftPro Vendor | 4800 Falls of Neuse Rd., Raleigh, NC 27... |

Product and Lender Section

From the Issuing Office screen, you will navigate to the **Product and Lender Selection** Screen where you can view the order information pulled from your ProForm order.

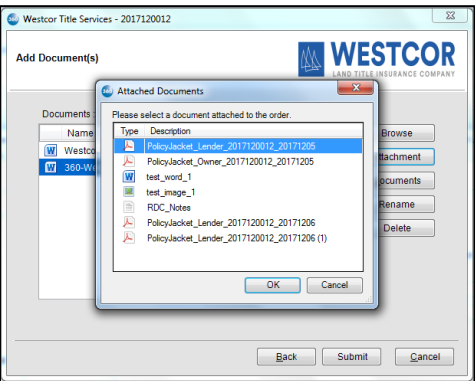
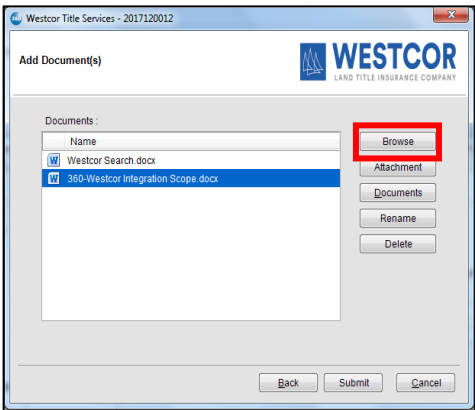
Additional Information

On clicking “Additional Information” on the Product and Lender Selection screen, you will navigate to the **File Information** screen where you can view the property(s) and contacts (Buyers and Sellers) details pulled from your ProForm order. Click on **Close** to return to the Product and Lender Selection screen.

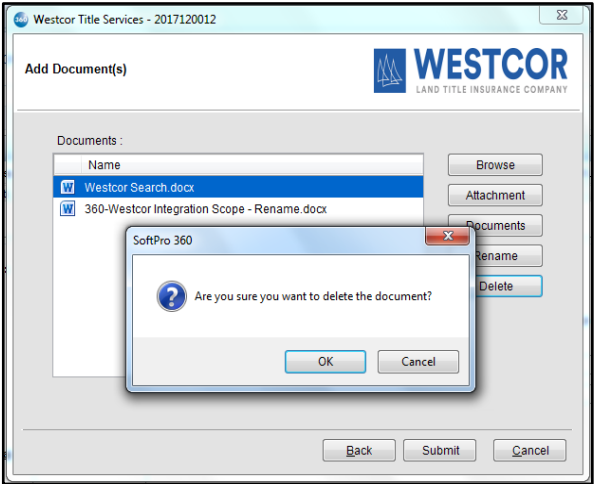
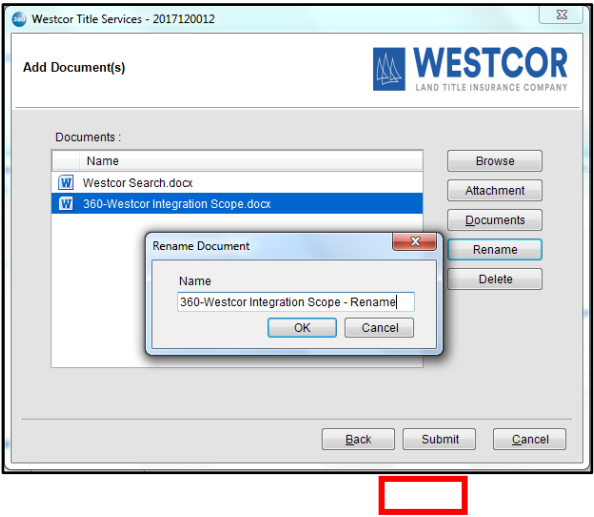


Add Documents

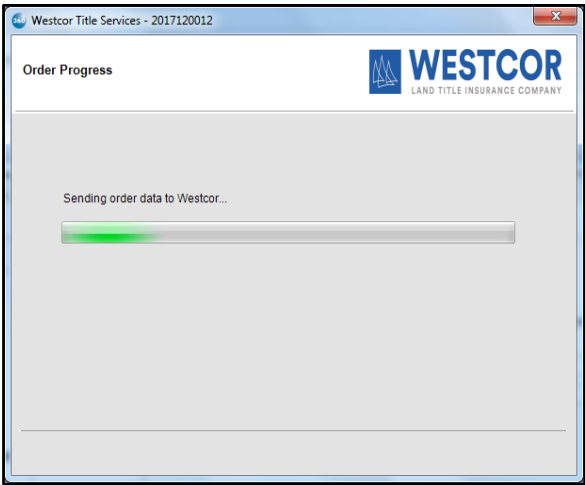
On clicking Next on the Product and Lender Selection screen, you will be navigated to the “Add Documents” screen where you can attach documents to be sent along with your ProForm order to Westcor. You can **browse** and select the document from your system, or you may select any documents **already attached** to your ProForm 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 **Submit** to send the order details to Westcor. You will see the **Order Progress** screen which depicts that the order is being sent to Westcor.



360 Order Queue

Within the SoftPro 360 queue, an **In Progress** transaction will be created when an order is submitted. The transaction will display the ProForm order number, which is the linked order.

| Queue | | | | | | | |
|---|----------|---------------------|-------------|-----------------------|----------------|------------------|-----|
| <input checked="" type="checkbox"/> Next Step | | Views: Active Order | | Filter: All Providers | | | |
| | Provider | Service | Status | Linked Order | Linked Profile | Created By | Cr |
| | Westcor | Title Search | In Progress | 2017120012 | Default | Viswanath Thalla | 1/1 |
| | Westcor | Title Search | Rejected | 2017120012 | Default | Viswanath Thalla | 1/1 |

When Westcor sends back title data and document(s), the transaction will update to a **Ready** status.

| Queue | | | | | | | |
|---|----------|---------------------|----------|-----------------------|----------------|------------------|-------------------|
| <input checked="" type="checkbox"/> Next Step | | Views: Active Order | | Filter: All Providers | | | |
| | Provider | Service | Status | Linked Order | Linked Profile | Created By | Created On |
| | Westcor | Title Search | Ready | 2017120012 | Default | Viswanath Thalla | 1/16/2018 3:16 PM |
| | Westcor | Title Search | Rejected | 2017120012 | Default | Viswanath Thalla | 1/16/2018 12:4... |

When you click **Next Step**, you may proceed to the Review Screen and review the title data and documents sent by Westcor.

Review Screen - Accepting Title Data and Documents

From the Review screen, you will be able to view and specify which data and document(s) returned by RDC that you want to include in your order.

The Data section will display the name of the field, the corresponding value currently in the linked order (Current Value) and the new value of that field returned from Westcor (New Value). The Documents section will display the products that were also returned from Westcor.

| Data | | |
|-------------------|--------------------------------|--------------------------------|
| Name | Current Value | New Value |
| Undewriter | Westcor Land Title Insuranc... | Westcor Land Title Insuranc... |
| Legal Description | Lot 23, Block 47, Lehigh Ac... | Lot 23, Block 47, Lehigh Ac... |
| Address 1 | 101 Test Street | 12 Willon Dr. None |
| City | Boca Raton | Boca Raton |
| Zip | 32616 | 55555 |
| APN/Parcel ID | 10215 | 19-44-27-10-00047.0230 |

| View | Copy | Document Name | File Name | File Size | Transferred |
|-------------------------------------|------|-----------------|---------------------|-----------|-------------|
| <input checked="" type="checkbox"/> | | test_word_1 | test_word_1.doc | 114.50 KB | 100% |
| <input checked="" type="checkbox"/> | | test_image_1 | test_image_1.tif | 47.37 KB | 100% |
| <input checked="" type="checkbox"/> | | Combined_Report | Combined_Report.pdf | 188.91 KB | 100% |
| <input checked="" type="checkbox"/> | | Westcor_Notes | Westcor_Notes.rtf | 0.23 KB | 100% |

☒ Overwrite Requirements/Exceptions

If the checkbox next to a data field is checked, then the New Value will overwrite the Current Value in the order when you click **Accept**. Similarly, if it is checked for a document, then that document will attach to the linked order. Otherwise, if the checkbox is unchecked, then the corresponding data and document will be ignored.

If the data and documents are not accepted, the **Cancel** button closes the Review screen and no data or documents will be accepted. By clicking **Accept**, the transaction status will change to **Accepted** in the 360 transaction queue.

Note that if the checkbox next to “**Overwrite Requirements/Exceptions**” is *unchecked*, then the requirements and exceptions that are returned by Westcor will *append* to those that are already in the order. If it is checked, then they will overwrite the requirements and exceptions in the order. However, if there are, for example, two requirements that are returned from Westcor and there are five in the order, then only the first two of the five requirements in the order will be overwritten. The last three will remain in the order.

Restrictive Covenants

If the vendor as determined the data belongs to the “Recording information of Restrictive Covenants” field, the Review screen will display the Exception data as “**Restrictive Covenants**”.

Upon clicking **Accept**, the data will be mapped to the “Recording information of Restrictive Covenants” field, under **Custom Fields** in the **Commitment – Schedule A** Title section.

| Name | Current Value | New Value |
|-------------------------------|---------------|-----------------------------------|
| Effective Date | 05/02/2023 | 5/2/2023 12:00:00 AM |
| Ownership Interest | Fee Simple | Fee Simple |
| Current Owner | Sally Seller | Sally Seller |
| Restrictive Covenants | | Restrictions, dedications, res... |
| Requirements (7)/ Description | | Special Warranty Deed from... |
| Requirements (8)/ Description | | Provide an affidavit by cure... |

Before Clicking **Accept**:

After Clicking **Accept**:

Update Order

Transactions that have a status of **In Progress** and **Accepted** can be updated by highlighting the transaction and clicking on the **Next Step** button.

| Queue | | | | | | | |
|---|----------|--------------|----------|--------------|----------------|------------------|-------------------|
| <div> Next Step Views: Active Order Filter: All Providers </div> | | | | | | | |
| | Provider | Service | Status | Linked Order | Linked Profile | Created By | Created On |
| ➡ | Westcor | Title Search | Accepted | 2017120012 | Default | Viswanath Thalla | 1/16/2018 3:16 PM |
| ➡ | Westcor | Title Search | Rejected | 2017120012 | Default | Viswanath Thalla | 1/16/2018 12:4... |

When you click the **Next Step** button, you will be prompted to provide your login credentials on the login screen. If you had checked the “Remember Me” checkbox during order creation, then you will automatically be logged in to the Update screen.

On the **Update or Revision Request** screen, you will see the below items which you can update on your ProForm order:

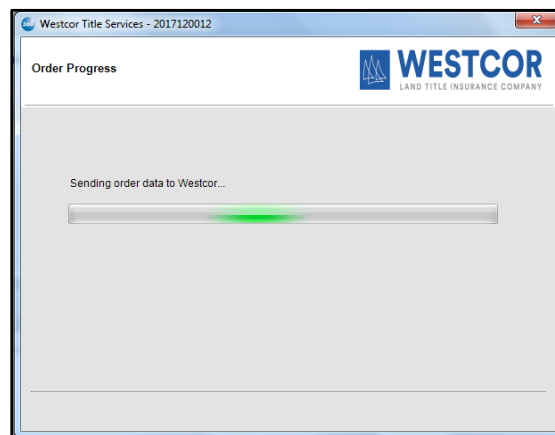
Update Request:

- **Update Type** – Select an update type from the below options:
 - Pre-Closing
 - Post-Closing
- **Closing Date** – Provide the new Closing Date.
- **Due Date** – Provide the new Due Date.
- **Notes** – Provide notes if any.

Revision Request:

- **Notes-** Provide revised notes.
 - The user has the option to submit revised notes. The 360 system will then transmit the revised notes along with the original submission request, with the Update type designated as Pre-Closing.

The order will be submitted to Westcor when you click the **Submit** button.



Upon a successful submit, the transaction status will change to “In Progress” in the 360 transaction queue.

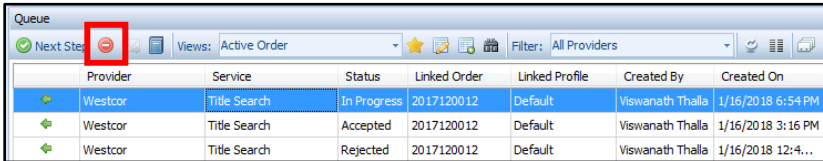
| Queue | | | | | | | |
|---|----------|--------------|-------------|--------------|----------------|------------------|-------------------|
| <div> Next Step Views: Active Order Filter: All Providers </div> | | | | | | | |
| | Provider | Service | Status | Linked Order | Linked Profile | Created By | Created On |
| ➡ | Westcor | Title Search | In Progress | 2017120012 | Default | Viswanath Thalla | 1/16/2018 3:16 PM |
| ➡ | Westcor | Title Search | Rejected | 2017120012 | Default | Viswanath Thalla | 1/16/2018 12:4... |

Note: When users update the Westcor Title Search Order and encounter the pop-up message displayed below, they are advised to contact Westcor.

“The transaction you are trying to update was created on an older version of the Westcor/SoftPro integration. If you would like to order an update for this transaction, please send an email request to updates@wltic.com”

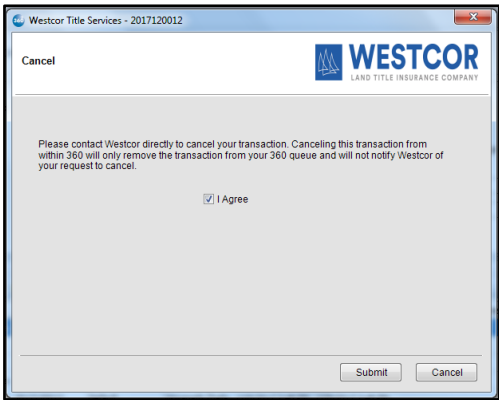
Cancel Order

Transactions that have a status of **In Progress** (after first Submit) can be canceled by highlighting the transaction and clicking on the **Cancel** button.



| | Provider | Service | Status | Linked Order | Linked Profile | Created By | Created On |
|--|----------|--------------|-------------|--------------|----------------|------------------|-------------------|
| | Westcor | Title Search | In Progress | 2017120012 | Default | Viswanath Thalla | 1/16/2018 6:54 PM |
| | Westcor | Title Search | Accepted | 2017120012 | Default | Viswanath Thalla | 1/16/2018 3:16 PM |
| | Westcor | Title Search | Rejected | 2017120012 | Default | Viswanath Thalla | 1/16/2018 12:4... |

The Cancel dialog will tell you that you must contact Westcor to cancel this transaction, and you must click **“I Agree”** to change the transaction status to **Canceled**.



Westcor Title Services - 2017120012

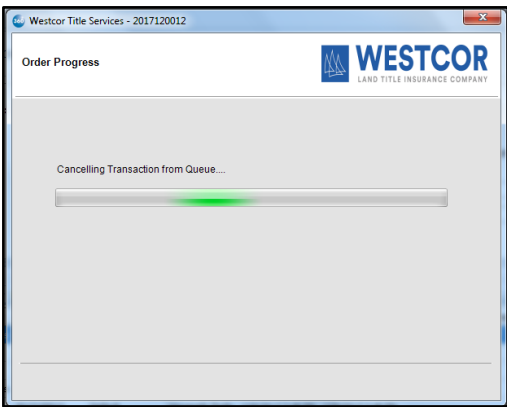
Cancel

Please contact Westcor directly to cancel your transaction. Canceling this transaction from within 360 will only remove the transaction from your 360 queue and will not notify Westcor of your request to cancel.

☒ I Agree

Submit Cancel

The status of the transaction in the SoftPro 360 queue will change to **Canceled**.

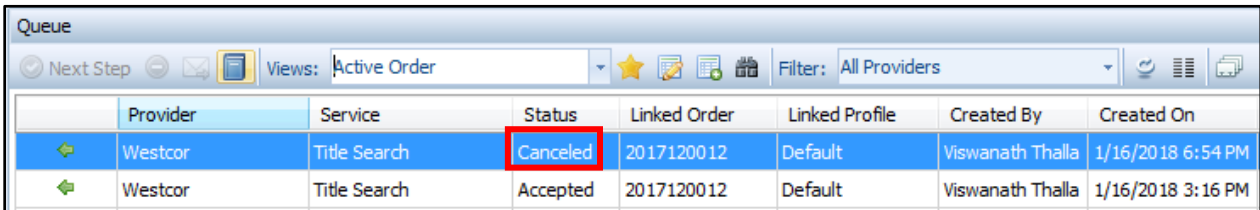


Westcor Title Services - 2017120012

Order Progress

Cancelling Transaction from Queue...

[Progress Bar]



| | Provider | Service | Status | Linked Order | Linked Profile | Created By | Created On |
|--|----------|--------------|----------|--------------|----------------|------------------|-------------------|
| | Westcor | Title Search | Canceled | 2017120012 | Default | Viswanath Thalla | 1/16/2018 6:54 PM |
| | Westcor | Title Search | Accepted | 2017120012 | Default | Viswanath Thalla | 1/16/2018 3:16 PM |