

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**

NOTE: Products provided by the Westcor Title Plant vary from state to state. Some of the products noted above may not be available outside of the State of Florida.

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:

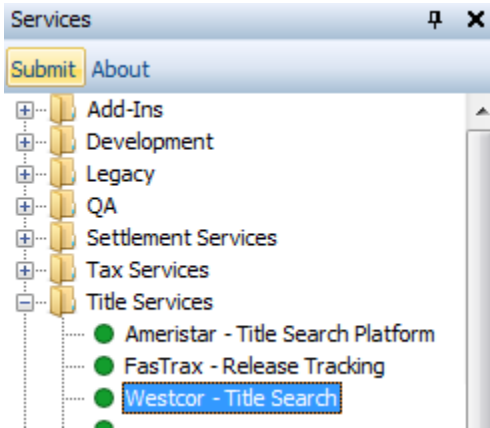


Figure 1 - SoftPro 360 Services Menu

Order Linking

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

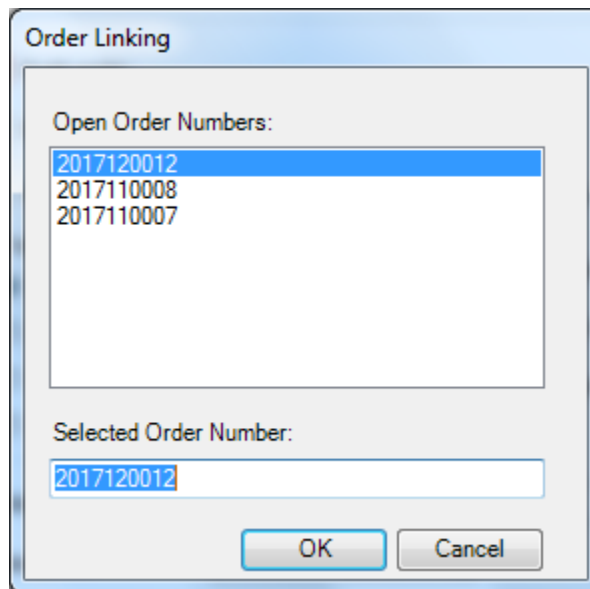


Figure 2 - Order Linking Screen

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:

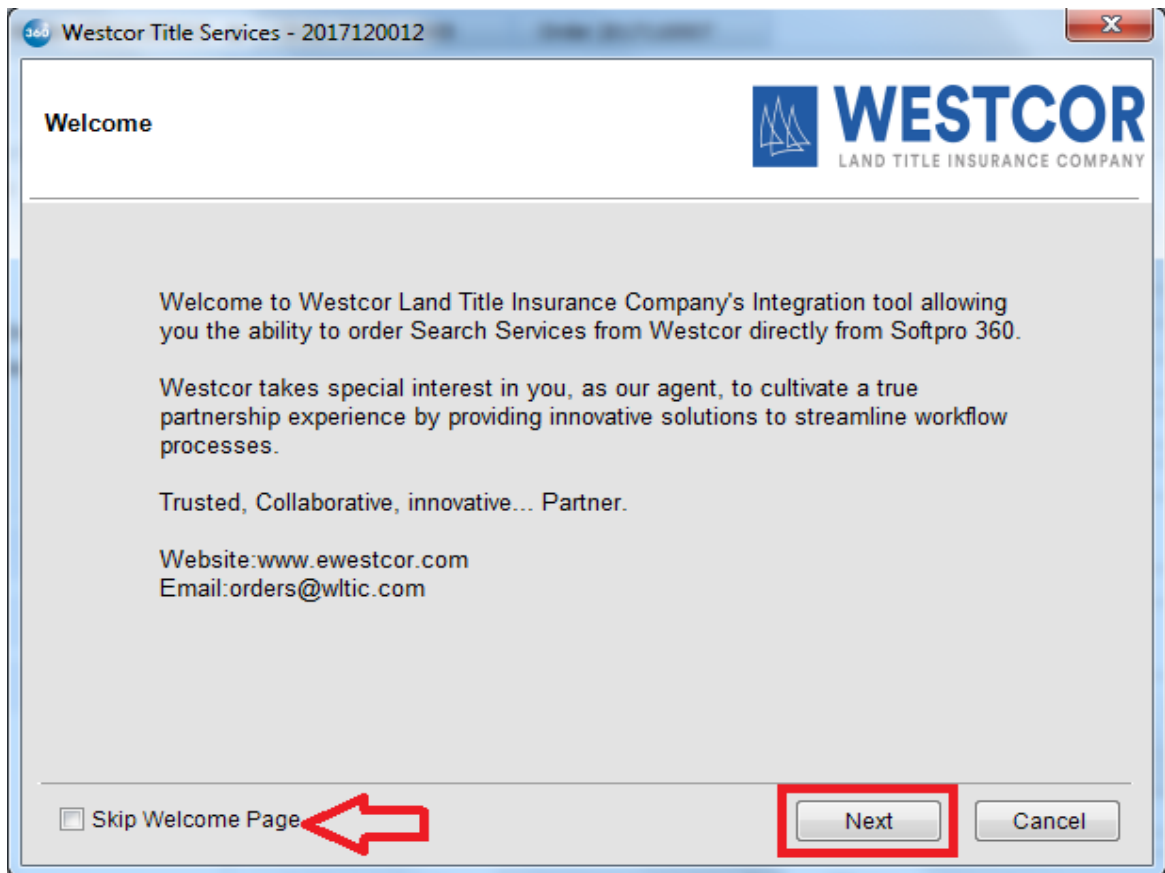
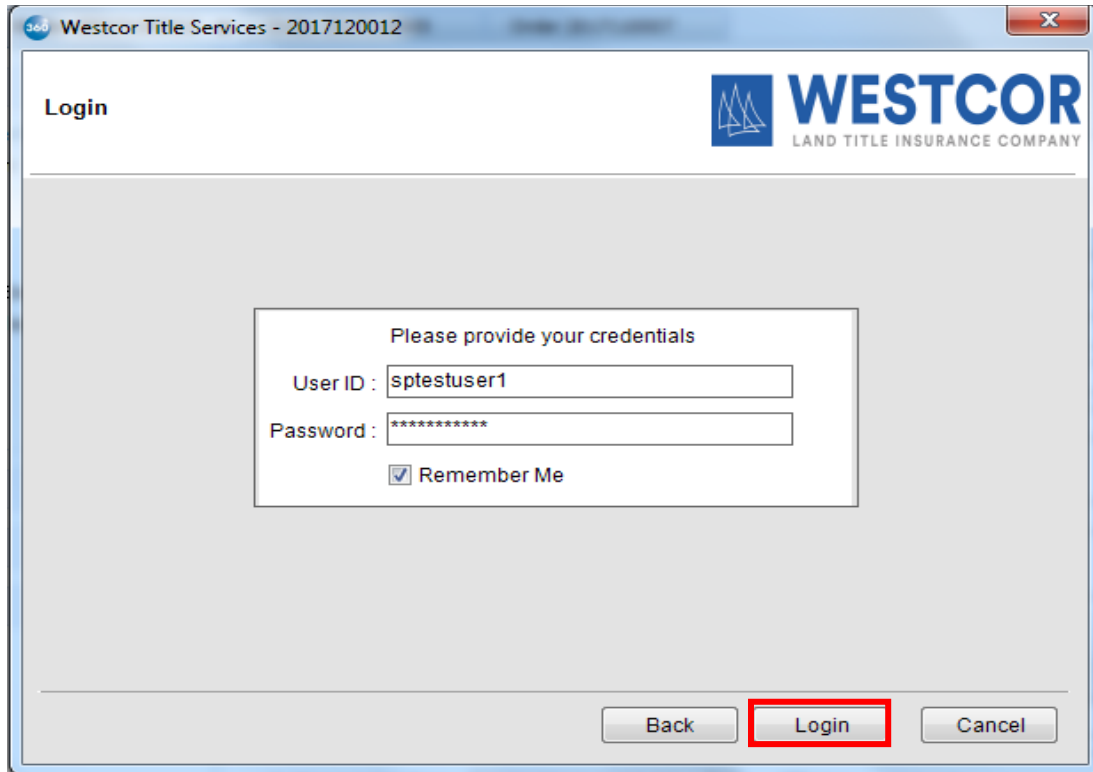


Figure 3 - Welcome Screen

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

Logging In

The **Login** screen requires you to enter a valid **EWestcor** user name 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:



Westcor Title Services - 2017120012

Login

WESTCOR
LAND TITLE INSURANCE COMPANY

Please provide your credentials

User ID : sptestuser1

Password : *****

Remember Me

Back Login Cancel

Figure 4 - Login Screen

NOTE: If you do not have a EWestcor user name and password or are experiencing issues with your given credentials, please contact your Westcor Agency Representative.

Submitting an Order

Issuing Office

Issuing Office Selection

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...

Figure 5 – Issuing Office Screen

Product and Lender Selection

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. Please be aware that most data points within the title search ordering process are pulling directly from your SoftPro 360 order and are read-only. To make any corrections on the read only data points, please refer back to the related ProForm order.

Westcor Title Services - 2017120012

Product and Lender Selection

Product

Product Type: TSR/Respa Commitment

Due Date: 01/19/2018 Sales Price: \$250,000.00

Notes: This is a test note for this order.

Lender

Loan: 1 Loan Amount: \$183,613.00

Loan Type: Conventional Uninsured

Lender: Plaza Home Mortgage, Inc.

Address: 252, Amerist Avenue

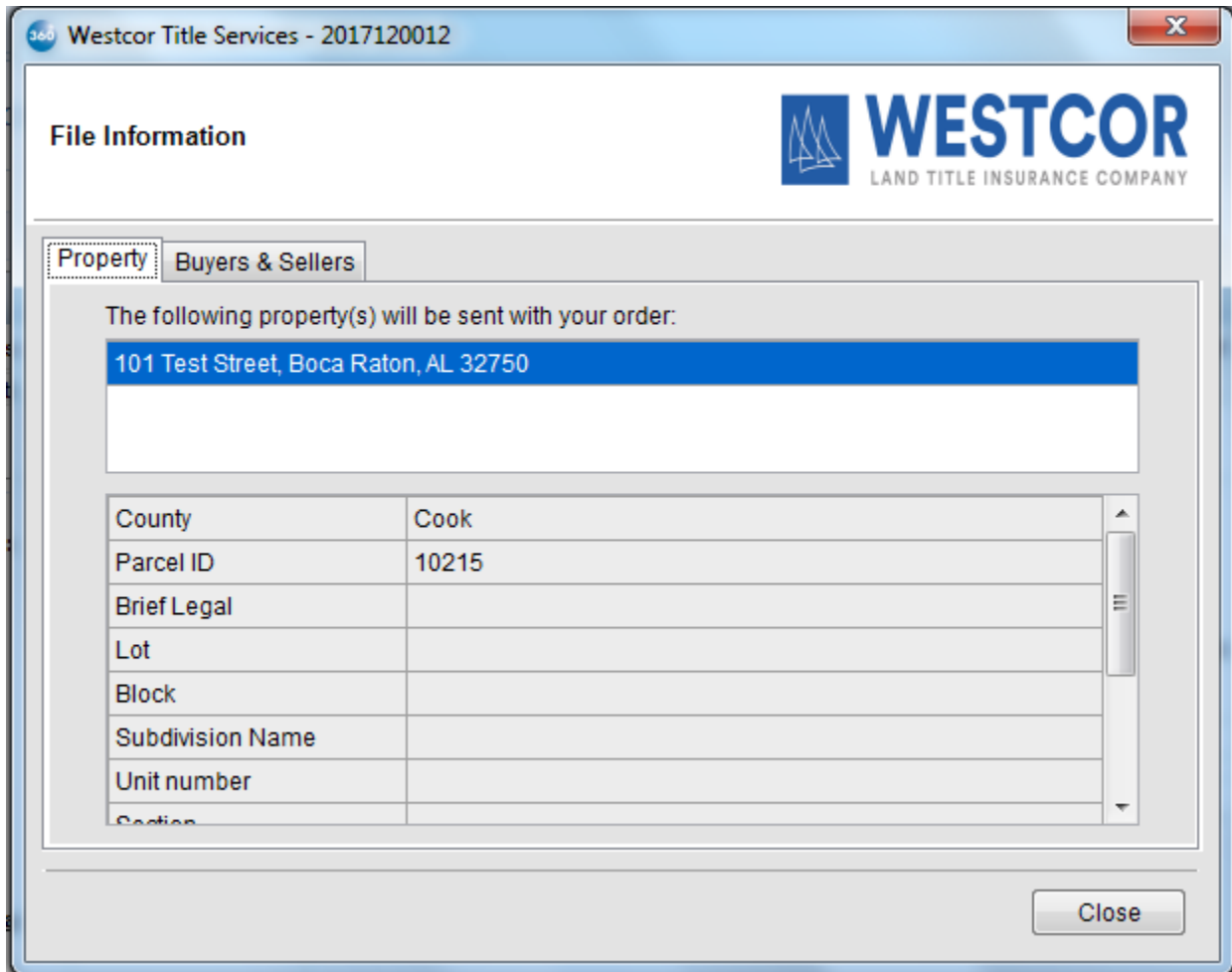
City: New York State: NY Zip: 12582-0048

[Additional Information](#) Back Next Cancel

Figure 6 – Product and Lender Selection Screen

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.



Westcor Title Services - 2017120012

File Information

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Property Buyers & Sellers

The following property(s) will be sent with your order:

101 Test Street, Boca Raton, AL 32750

County	Cook
Parcel ID	10215
Brief Legal	
Lot	
Block	
Subdivision Name	
Unit number	
Section	

Close

Figure 7 – File Information Screen -> Property Information

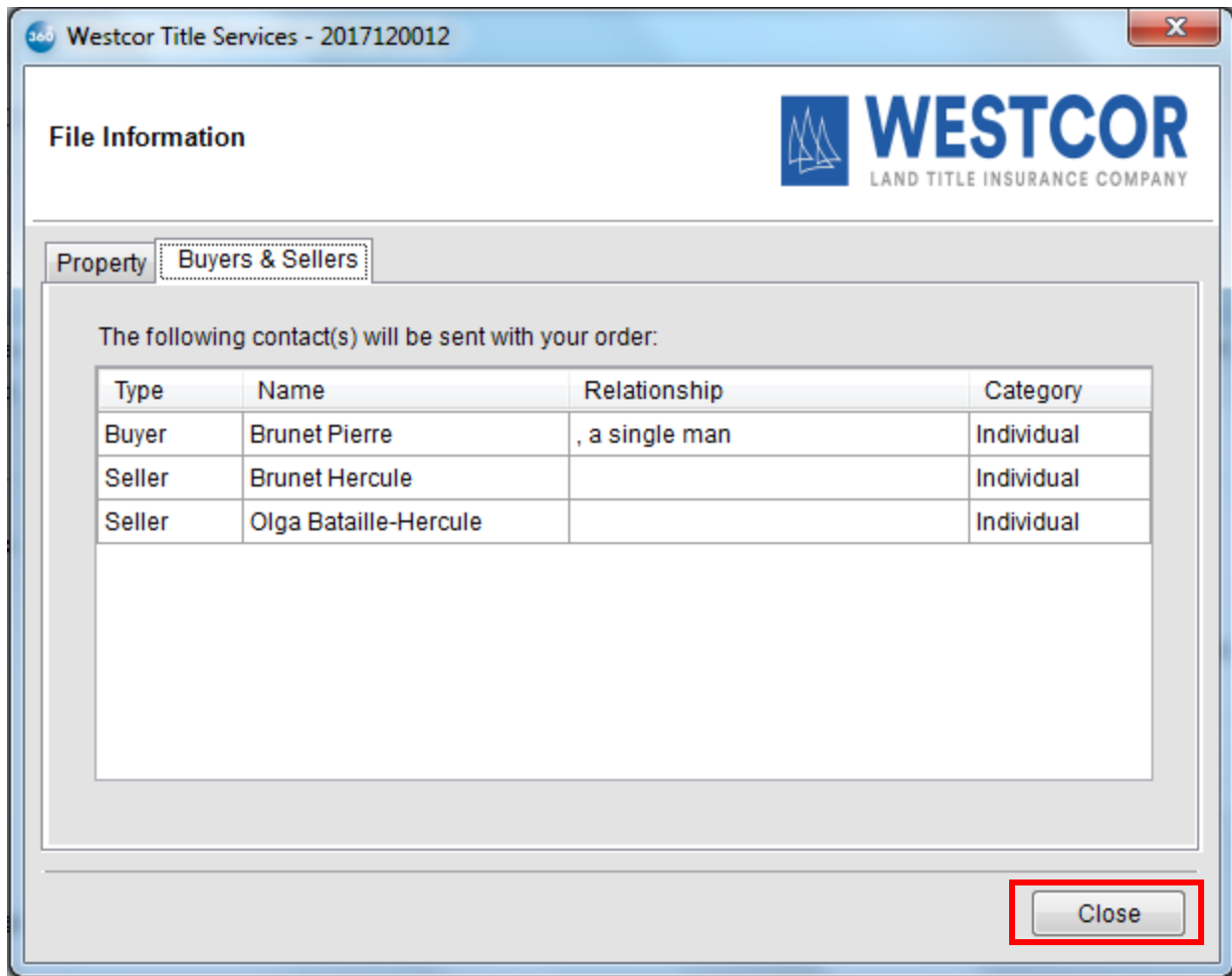


Figure 8 – File Information Screen -> Buyers and Sellers Information

Add Documents

Add Documents Section

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.

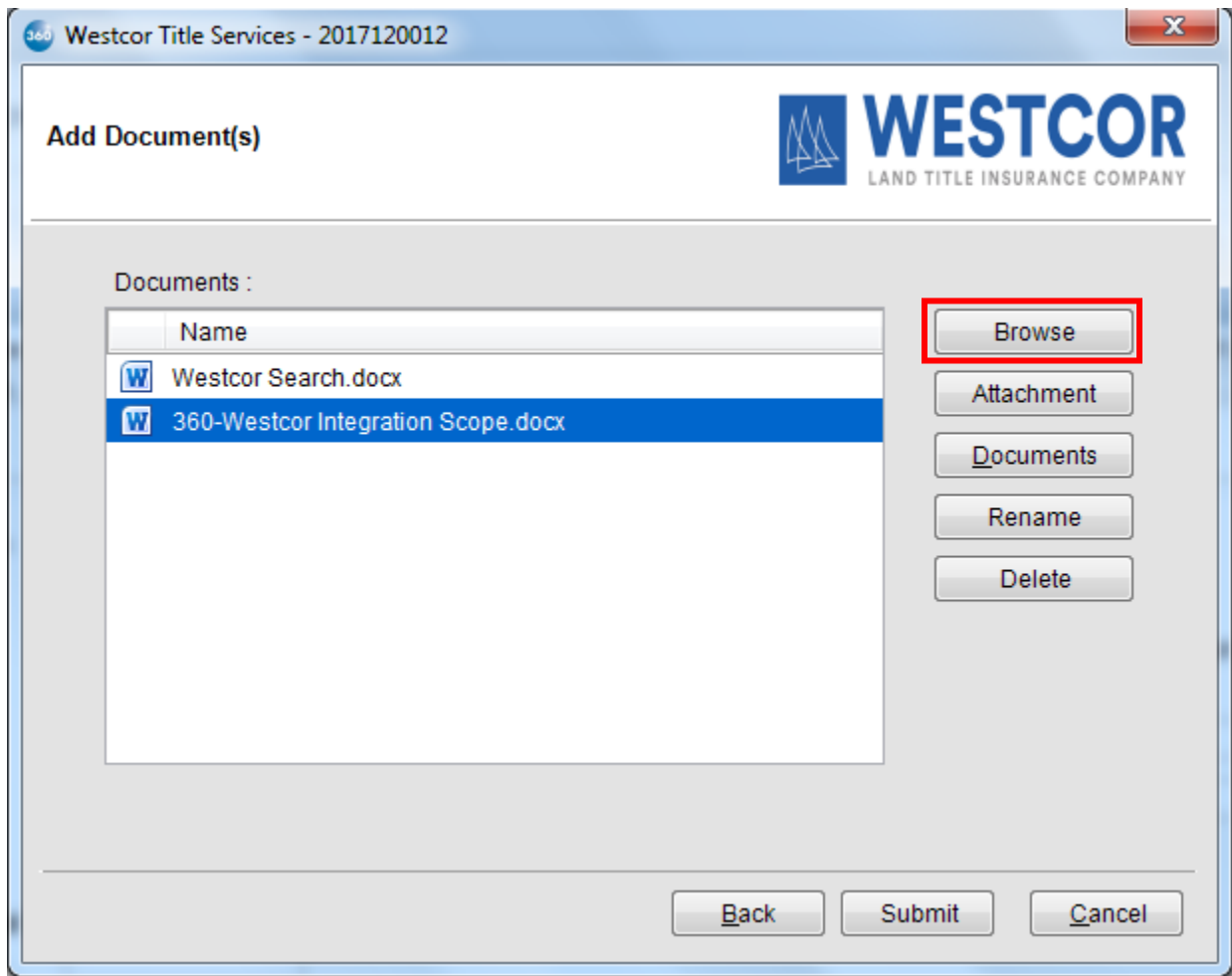


Figure 9 – Add Documents Screen -> Browse and Select Document

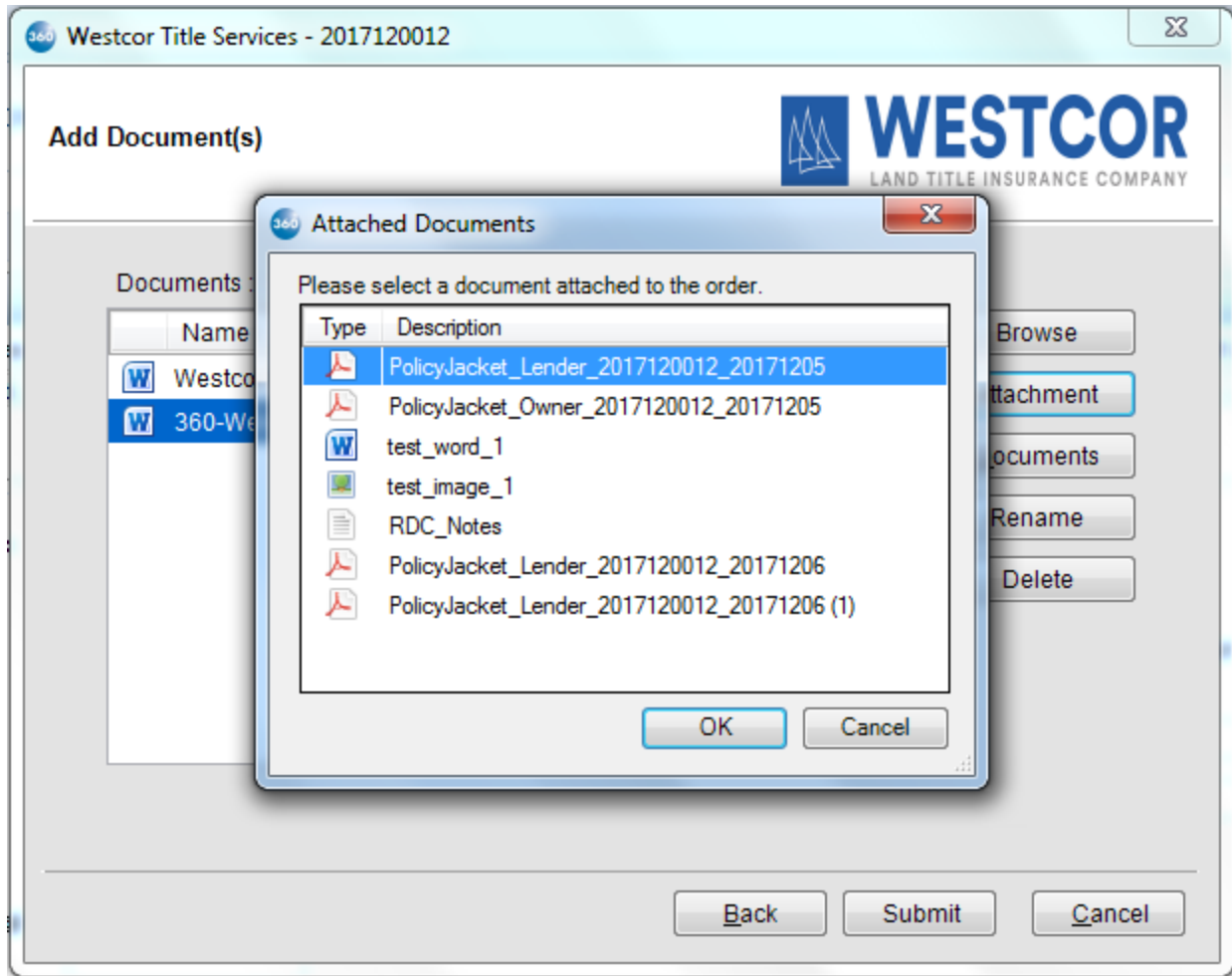


Figure 10 – Add Documents Screen -> Attachments available in ProForm Order

You can also **rename** or **delete** any attachment by selecting the document and performing the desired action.

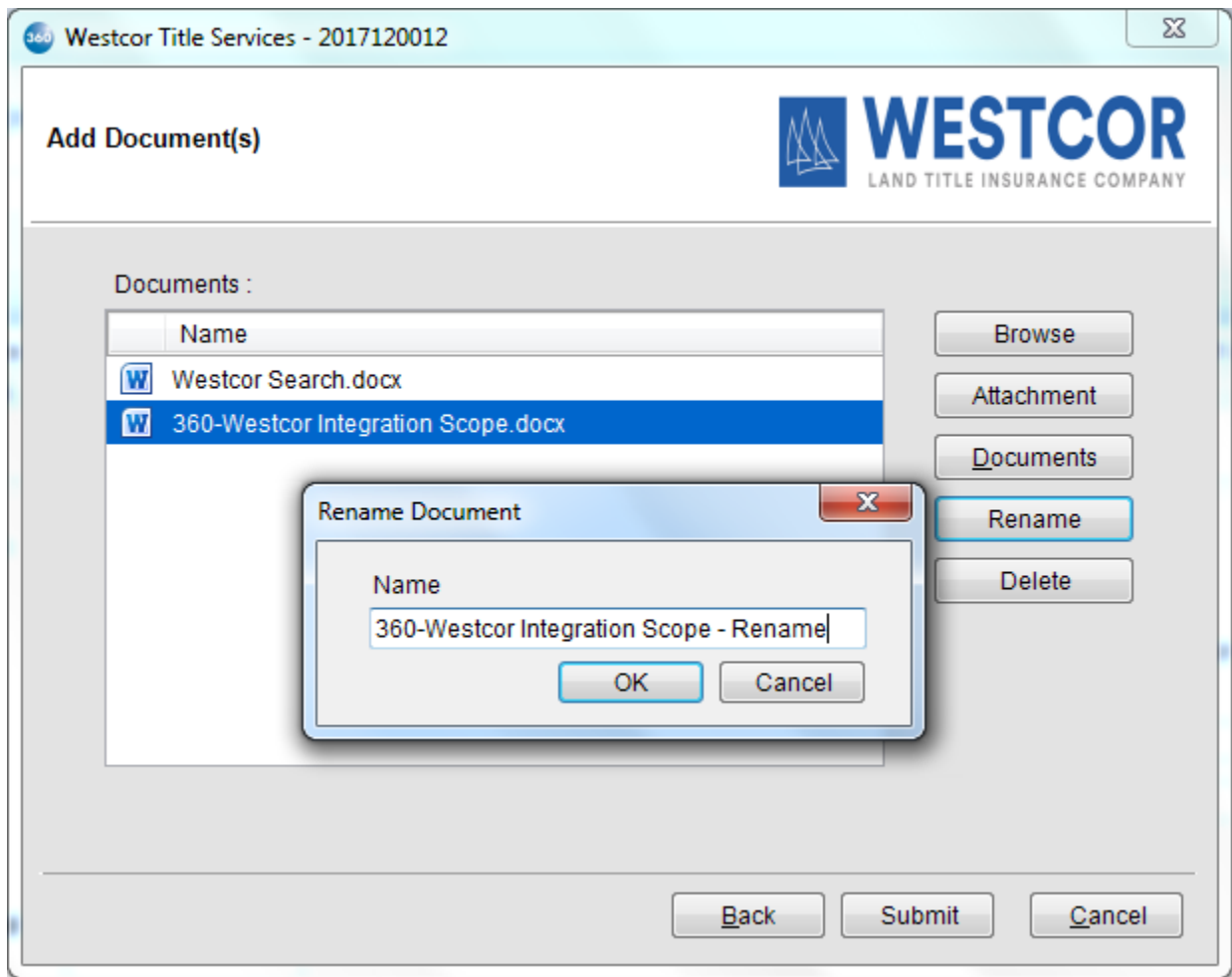


Figure 11 – Add Documents Screen -> Rename Document

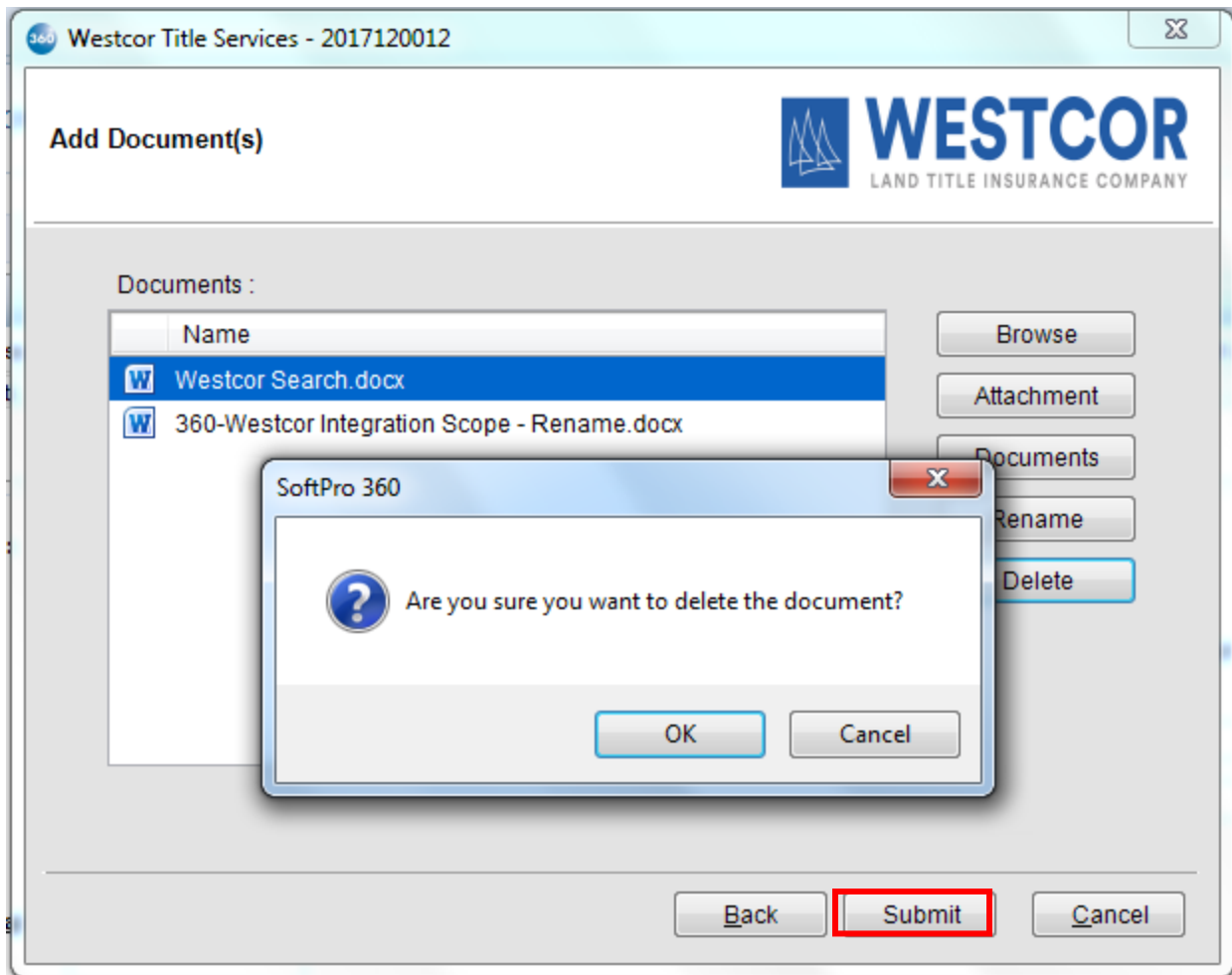


Figure 12 – Add Documents Screen -> Delete Document

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.

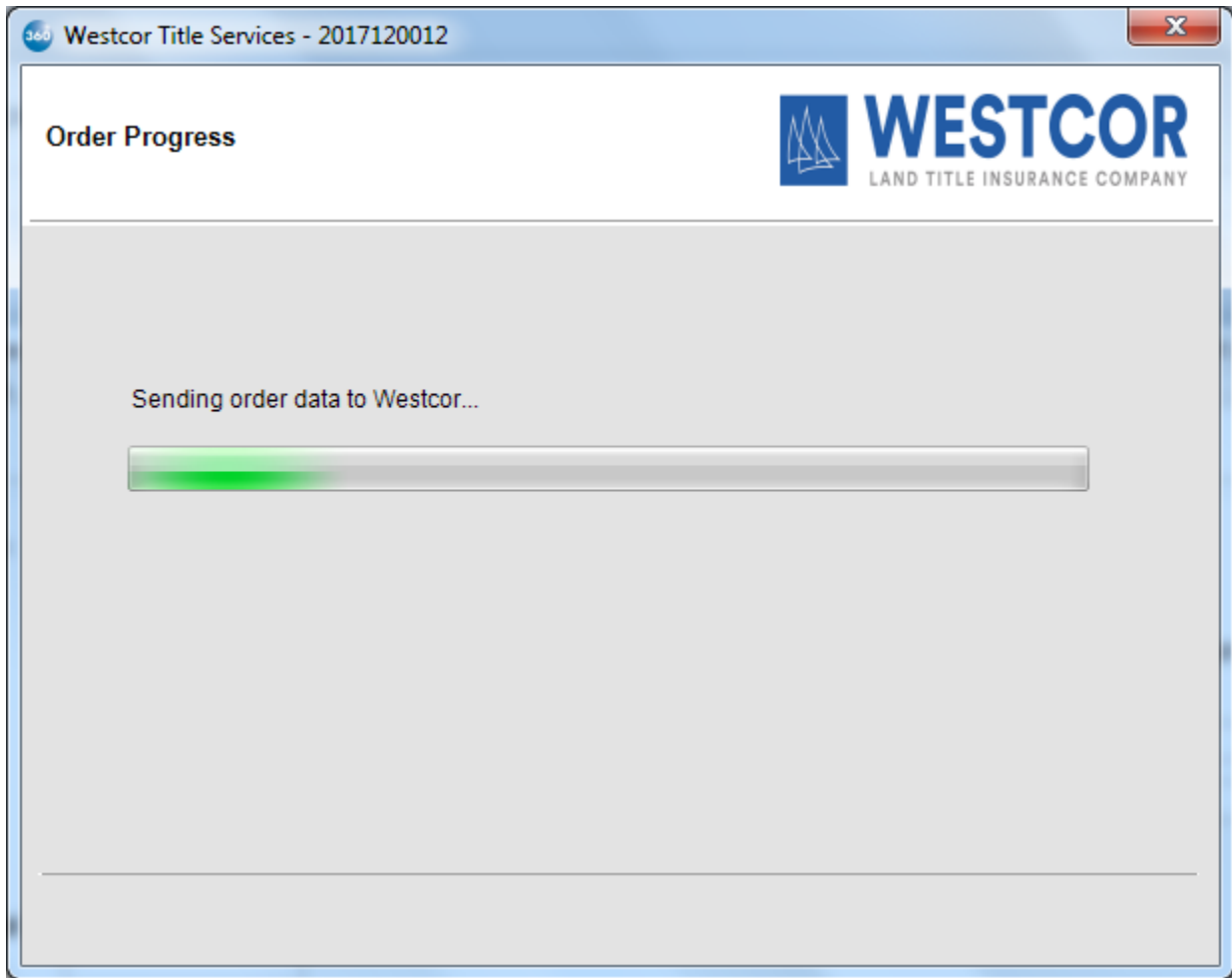
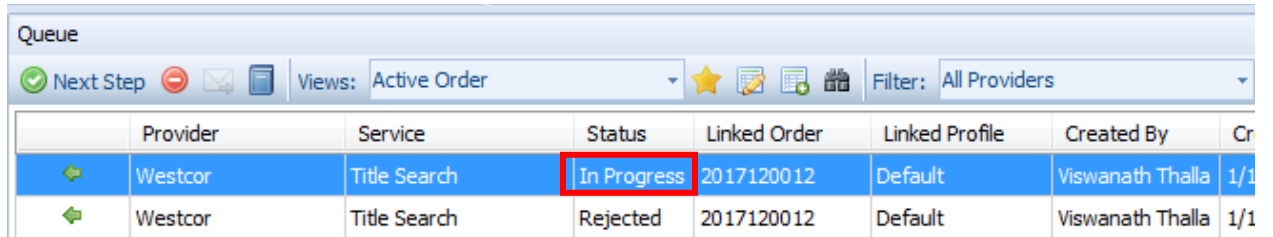


Figure 13 – Order Progress Screen

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.

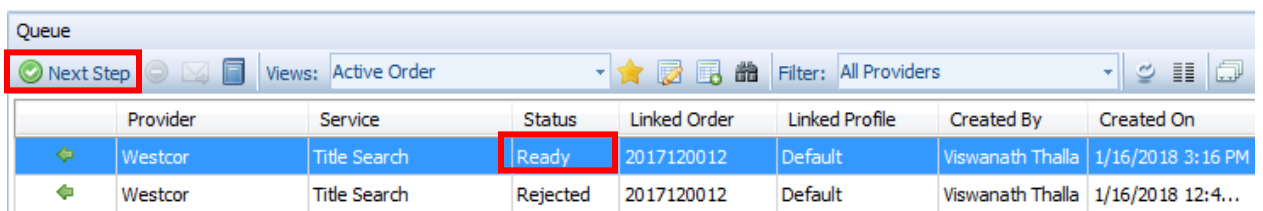


The screenshot shows the 'Queue' interface with a toolbar containing 'Next Step', a minus sign, an envelope icon, and a mobile phone icon. The 'Views' dropdown is set to 'Active Order' and the 'Filter' is 'All Providers'. The table below shows two transactions:

	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

Figure 14 - SoftPro 360 Queue: After Submitting an Order

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



The screenshot shows the 'Queue' interface with a toolbar containing 'Next Step', a minus sign, an envelope icon, and a mobile phone icon. The 'Views' dropdown is set to 'Active Order' and the 'Filter' is 'All Providers'. The table below shows two transactions:

	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...

Figure 15 - SoftPro 360 Queue: When 360 Receives Data & Documents

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.

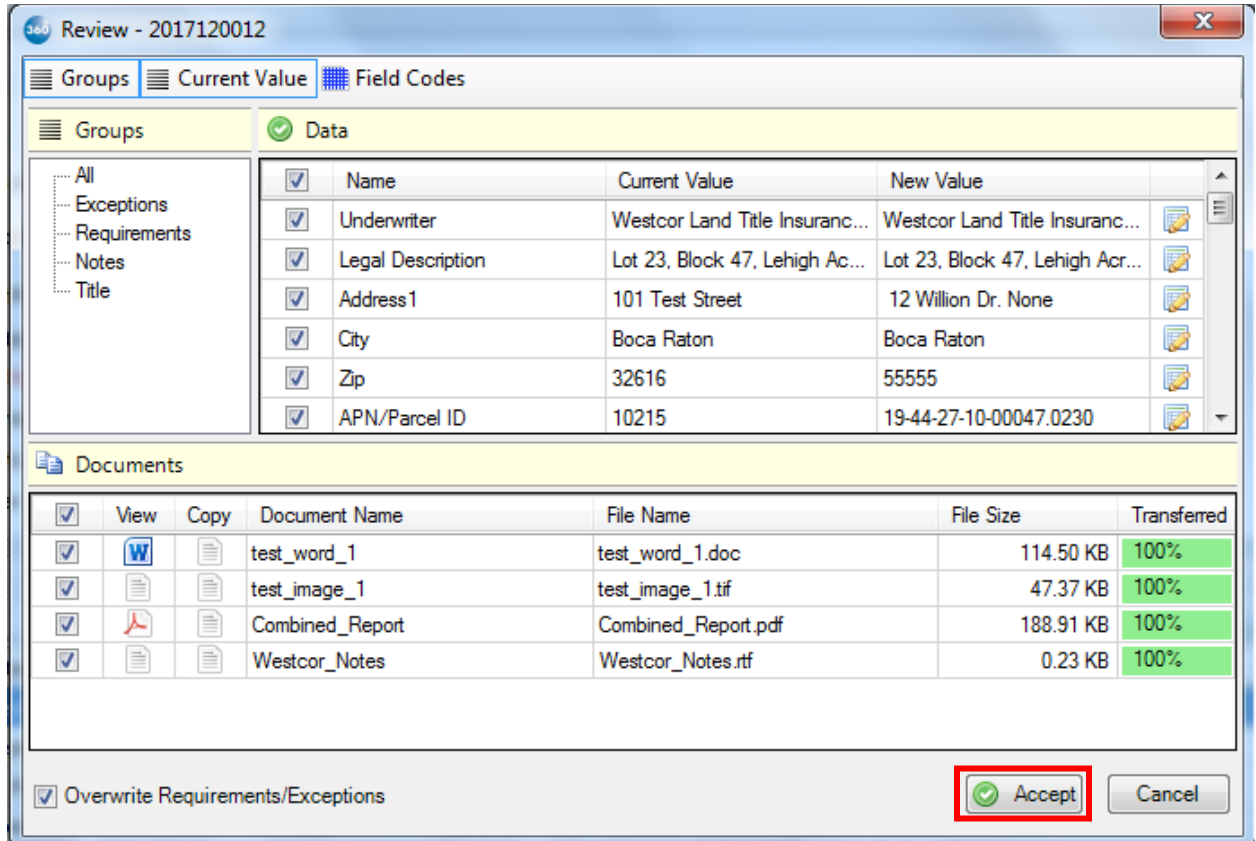


Figure 165 - Review Screen

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.

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.

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.



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...

Figure 176 – SoftPro 360 Queue: When 360 Accepts Data & Documents

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.

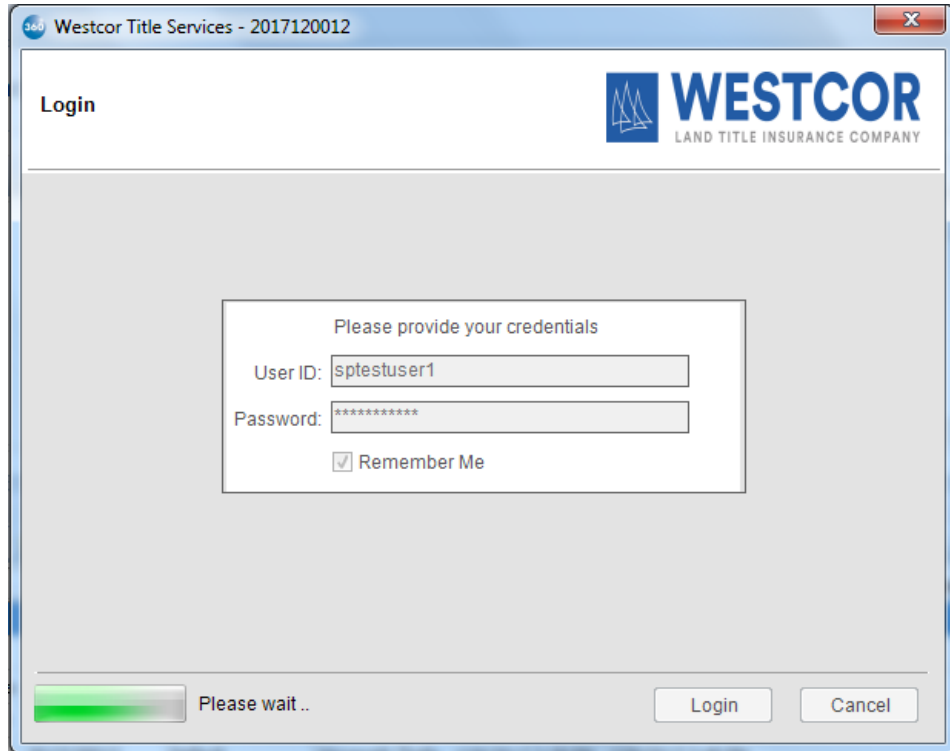


Figure 187 – Login Screen during Update Order

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

- **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.

Westcor Title Services - 2017120012

Update

WESTCOR
LAND TITLE INSURANCE COMPANY

Update Type: Pre-Closing
 Post-Closing

Closing Date: 01/17/2018

Due Date: 01/18/2018

Back Submit Cancel

Figure 198 – Update Order Screen

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

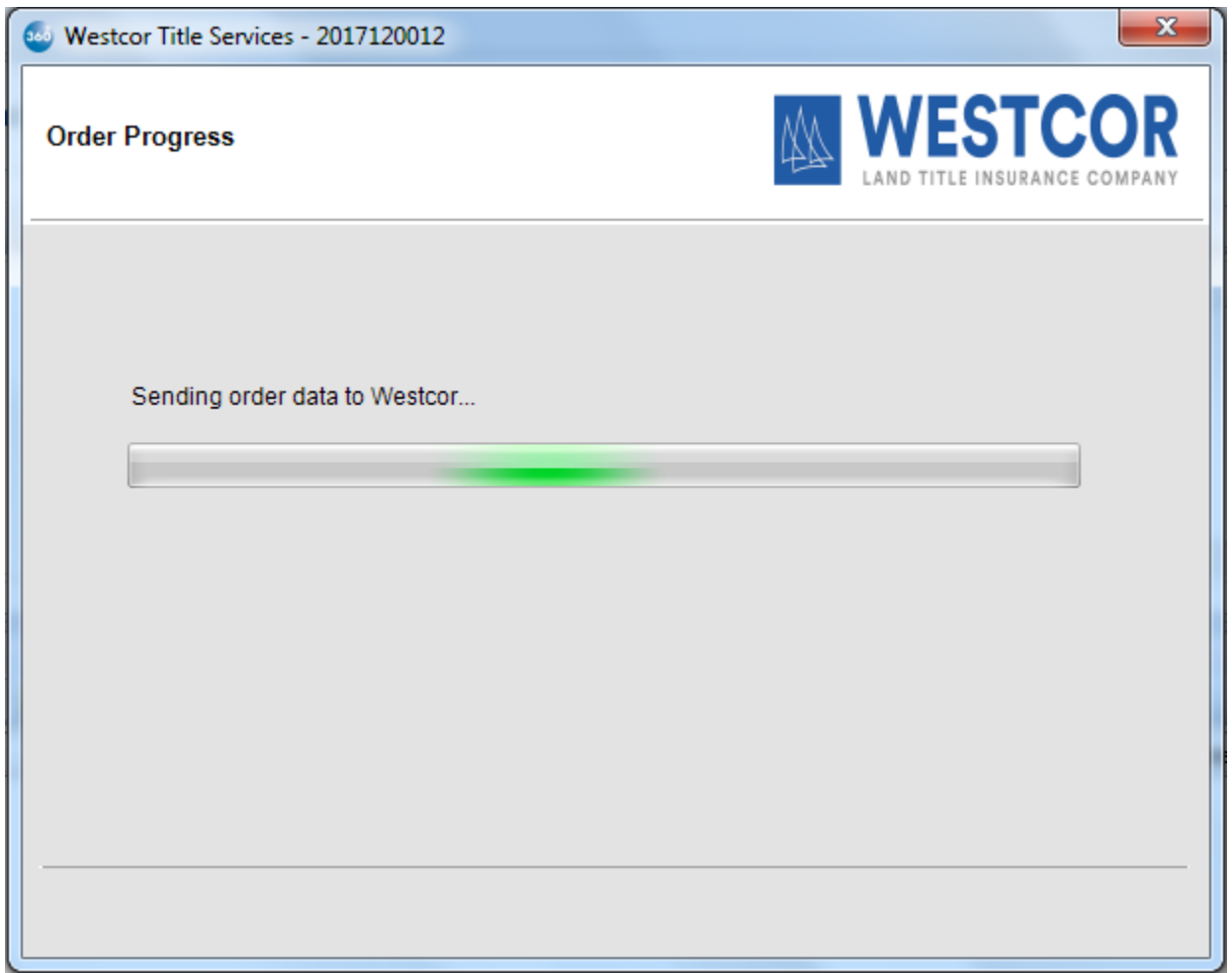


Figure 20 – Order Progress Screen

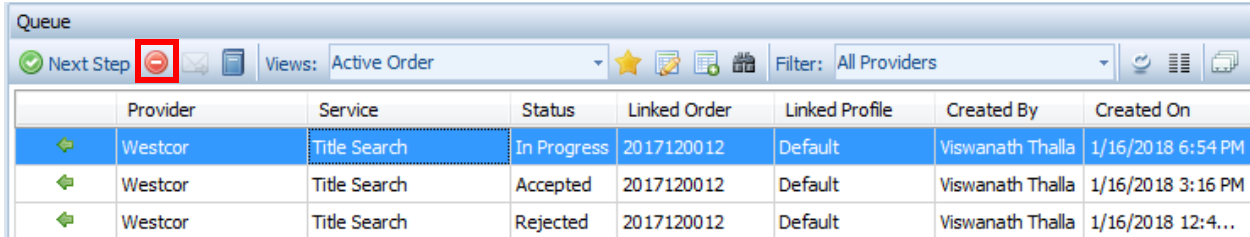
Upon a successful submit, the transaction status will change to “In Progress” in the 360 transaction queue.

Queue							
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...	

Figure 21 - SoftPro 360 Queue: After Submitting the update order request

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...

Figure 22 - SoftPro 360 Queue: After Submitting the order request

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**.

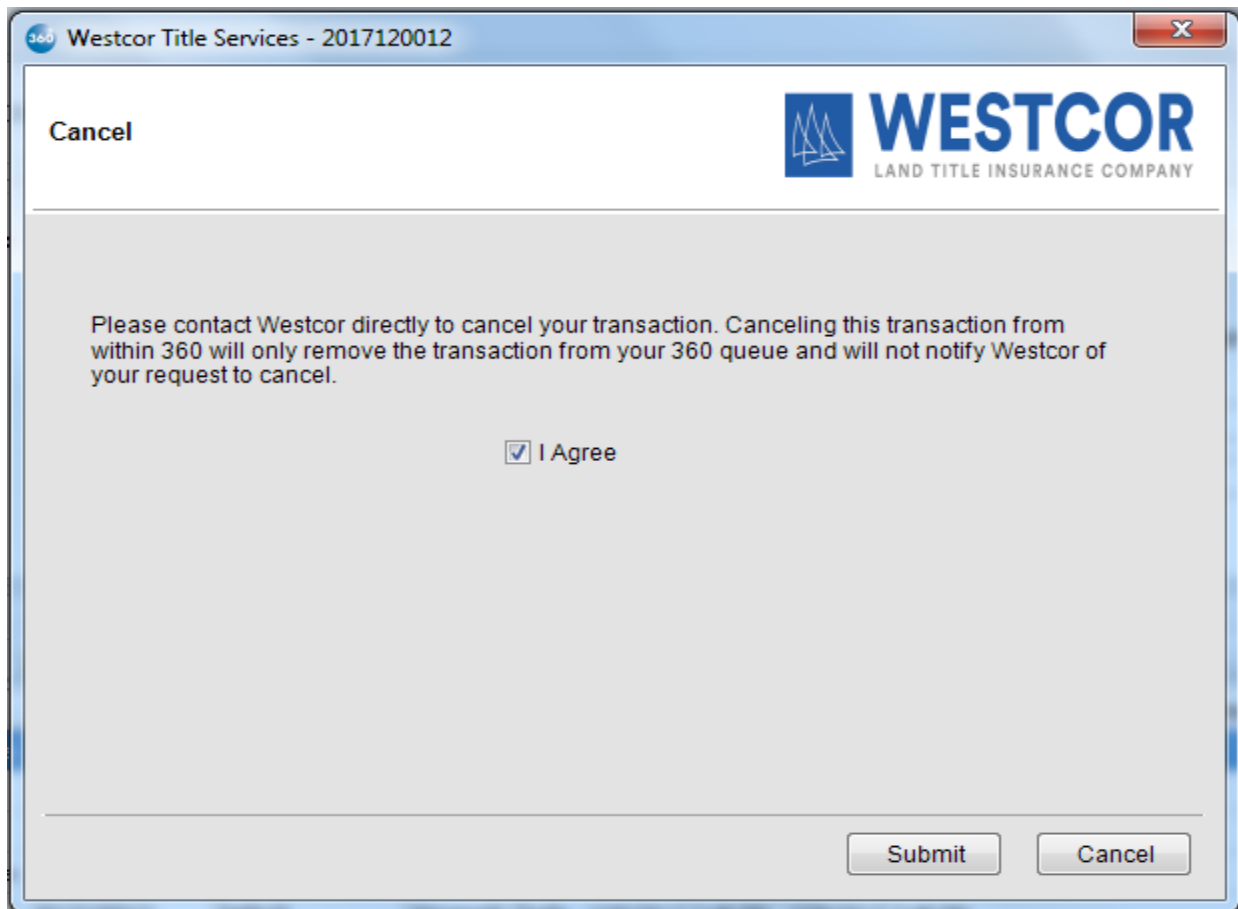


Figure 23 – Cancel Screen

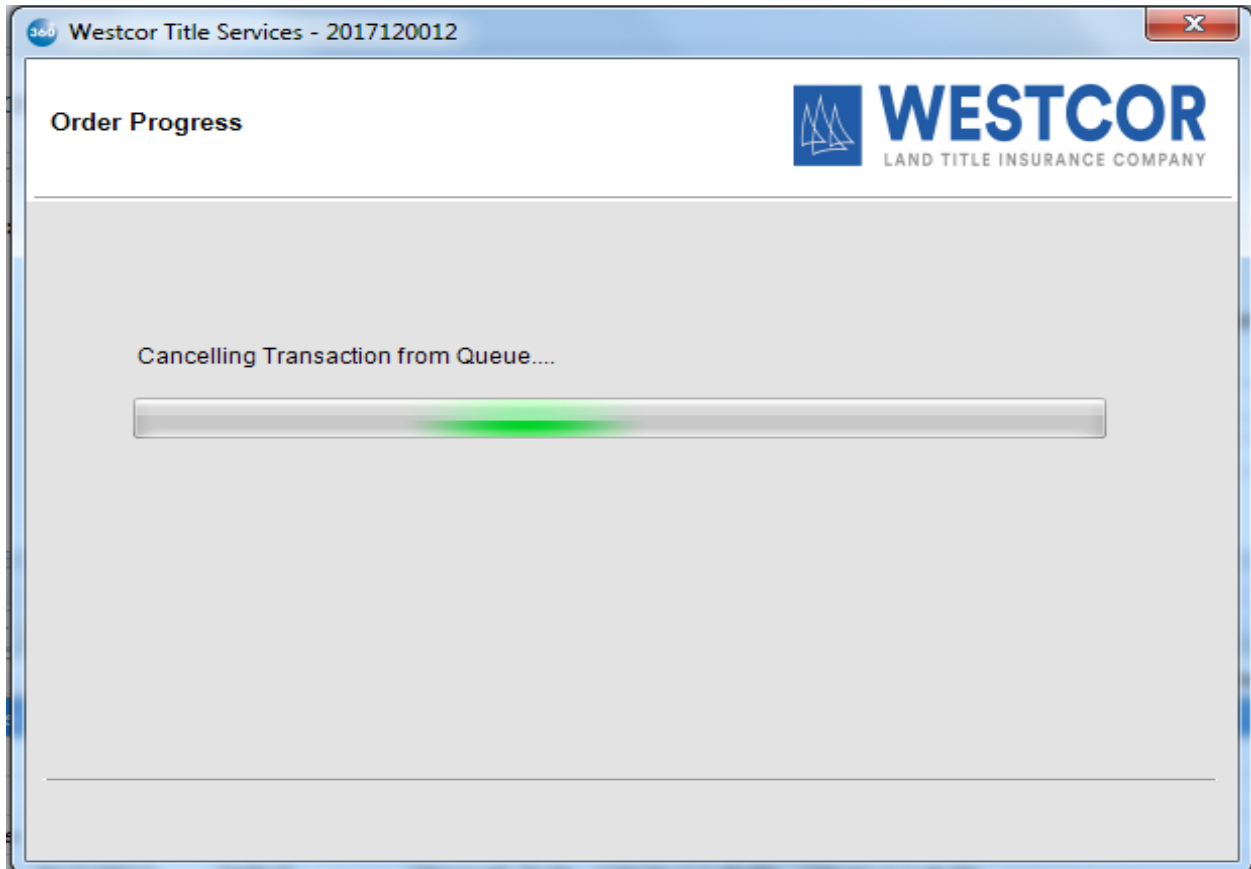


Figure 24 – Canceling order on SoftPro 360

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

Queue							
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	

FAQs

- 1. Can I request an update via SoftPro 360 from an order requested via the EWestcor website?**
No. A Pre-closing/Post-closing Update will need to be requested through the same method that the original request was placed.
- 2. Will there be any changes in how I obtain policy jackets and CPLs from Westcor?**
No, please continue to use the EWestcor Interface located under the Underwriter Services Menu in SoftPro 360 for CPLs and Policy Jackets.
- 3. Who do I have contact if I am unable to log in?**
If you have any questions regarding your login, please contact Westcor Customer Service at 855-429-5842 or email customerservice@wltic.com.
- 4. Will I be able to view my order in EWestcor if I place my request in SoftPro 360?**
Any order placed via SoftPro 360 is still viewable within the EWestcor website under Datavault.
- 5. Is there any required data when placing a Westcor Title Search request via SoftPro 360?**
Prior to placing a request, please make sure there is data noted in the fields below on your ProForm Order.

 - Buyer or Seller
 - Address
 - City
 - State
 - Zip
 - County
- 6. Will I still receive new order confirmation emails?**
Yes. Once the request is registered by the Westcor Title Plant, an email will be sent to the user who placed the request. The email will note your internal file number along with the Westcor Title Plant number.
- 7. Am I able to communicate to Westcor within SoftPro while my request is in process?**
Not at this time. If you have any questions or notes regarding an order in progress, please contact Customer Service at 855-429-5842 or email the Title Plant at orders@wltic.com.

8. Will I still receive an email confirmation when my order is completed?

Yes. Once the order is completed by the Westcor Title Plant an email will be sent containing documents related to the order. This email is more for informational purposes as both the commitment data and documents will be available to upload via SoftPro 360.

9. How do I request status on an order in progress requested via SoftPro 360?

If status is needed for an active order, please contact Customer Service at 855-429-5842 or email the Title Plant at orders@wltic.com.

10. Can I request title searches for Realty Data Company via Westcor Title Search?

Not at this time. The Westcor Title Search interface is currently unable to route requests to Realty Data.

11. Can I request commitment revisions via SoftPro 360?

Not at this time. Currently, the interface is only used for Title Search and Update Requests. If a revision is needed, please contact the plant via email at orders@wltic.com.

12. What does it mean when a request is “Rejected” in my SoftPro 360 Queue?

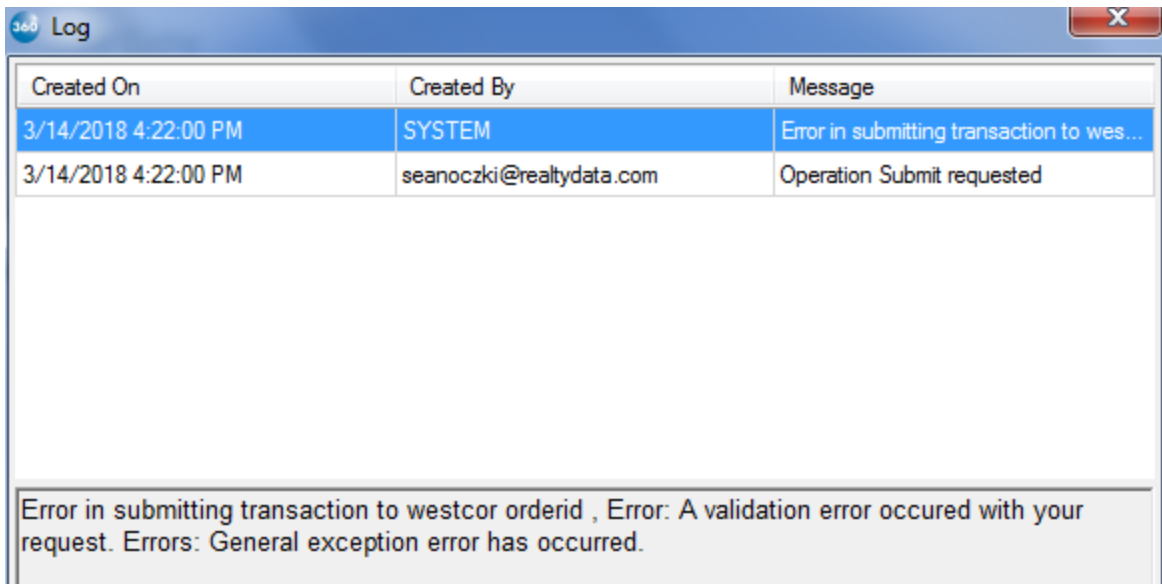
If you see an order in “Rejected” status in your SoftPro 360 Queue, click on the log book located at the top of the menu.

	Provider	Service	Status	Linked Order
←	Westcor	Title Search	In Progress	TEST1025
←	Westcor	Title Search	Rejected	TEST1025

Figure 26 – Order in Reject Status

Once clicked, highlight the message created by SYSTEM and view the message. Most messages will note errors within the property enter (ex. County/State combination does not match). If so, please correct your ProForm property entry and request the order again via the Westcor Interface in 360.

If the message is technical in nature (like below), please contact SoftPro Technical Support.



Created On	Created By	Message
3/14/2018 4:22:00 PM	SYSTEM	Error in submitting transaction to wes...
3/14/2018 4:22:00 PM	seanoczki@realtydata.com	Operation Submit requested

Error in submitting transaction to westcor orderid , Error: A validation error occured with your request. Errors: General exception error has occurred.

Figure 27– Order in Reject Status