

Traditional Title Services User Guide (v1.0)

July, 2022

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History

Date	Details
07/05/22	Initial Draft

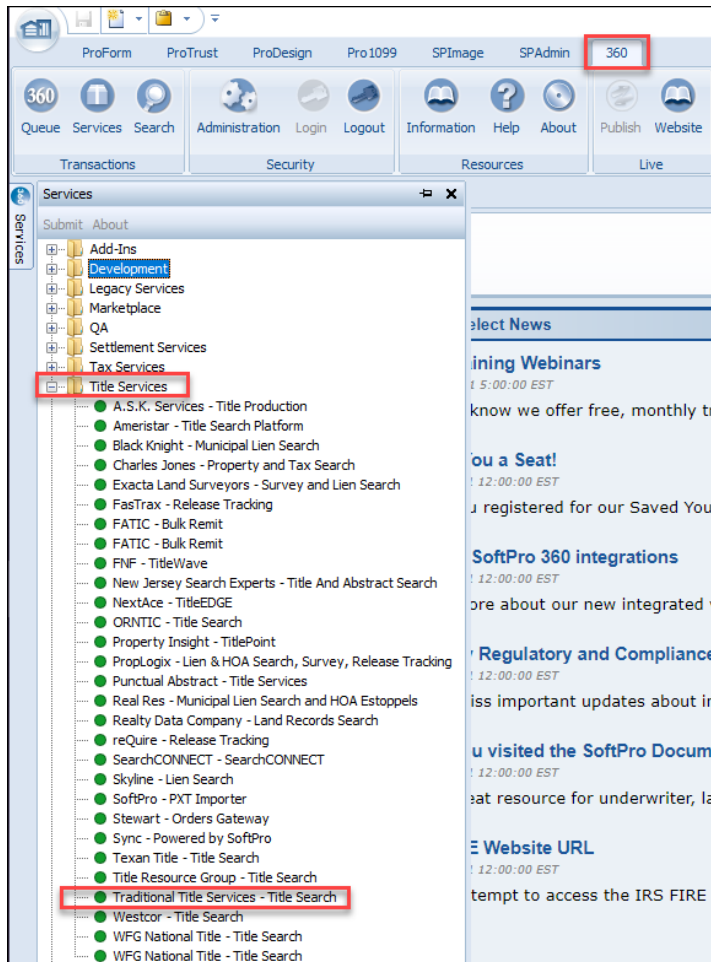
Introduction

Traditional Title Services allows agents to order Title Search products via SoftPro 360. The Traditional Title Services integration with SoftPro 360 provides users with the ability to seamlessly place orders for Traditional Title Services products and receive the results of those orders within SoftPro 360. Users will be able to submit an order, track the status of their requests and receive data/documents from Traditional Title Services all from within SoftPro 360.

Accessing

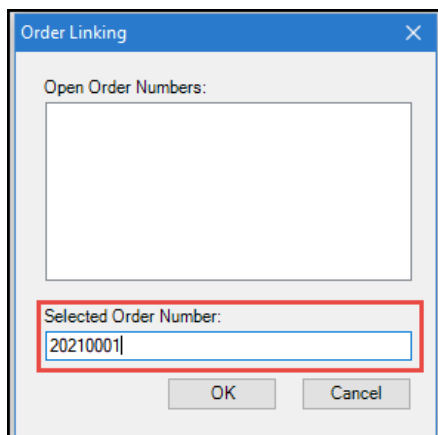
From the **360 Services** menu, double-click **Traditional Title Services** located under the **Title Services** folder. This will open the **Order Linking** screen:

1. Select the Services tab
2. Click the Settlement Services folder to expand
3. Double-click **Traditional Title Services – Title Search**



Select a ProForm Order for Title Search

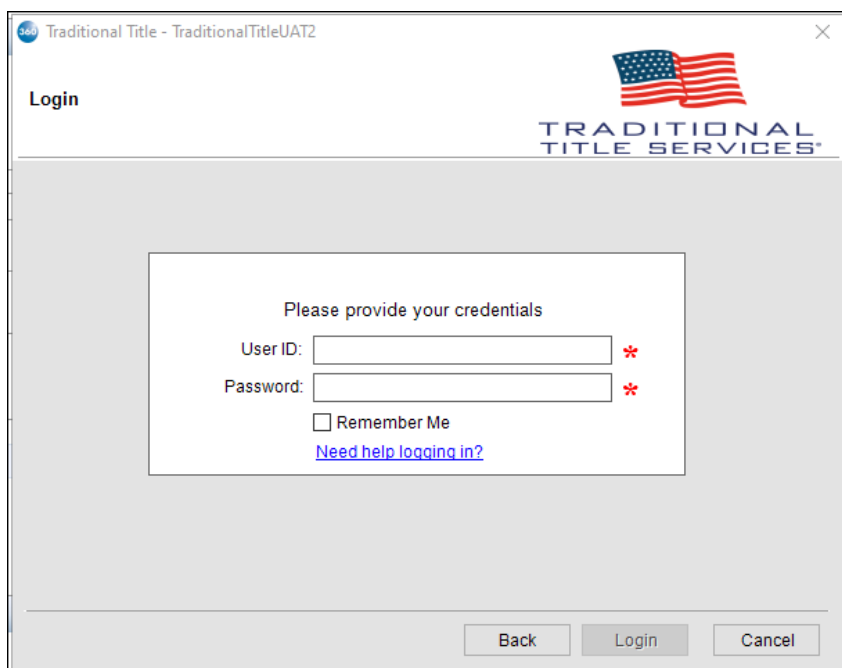
Each Search request must be linked to a ProForm Order. If a ProForm order already is open and Active, the Active order will automatically be linked to the request. If no Active order is open, enter the order number in the **Selected Order Number** field. Once the order is confirmed, click **OK**:

A screenshot of a Windows-style dialog box titled "Order Linking". It has a blue title bar with a close button (X). The dialog contains two text input fields. The first field is labeled "Open Order Numbers:" and is empty. The second field is labeled "Selected Order Number:" and contains the text "20210001". This second field is highlighted with a red rectangular border. Below the fields are two buttons: "OK" and "Cancel".

Logging in to Traditional Title Search

The login screen requires a valid **Username** and **Password**. Clicking on the '**Remember me**' check box will automatically log the user in when the product is launched in future sessions. If the user does not have a valid username and password they can click on the '**Need Help Logging In**' link which will open an email for the user to request assistance with login credentials.

Clicking on the **Login** button will continue to the **Property and Product Selection** Screen

A screenshot of a web application login screen. The title bar says "Traditional Title - TraditionalTitleUAT2". The page has a header with the "TRADITIONAL TITLE SERVICES" logo, which includes an American flag graphic. The main content area is titled "Login" and contains a form with the heading "Please provide your credentials". The form has two input fields: "User ID:" and "Password:", each followed by a red asterisk (*). Below these fields is a checkbox labeled "Remember Me" and a blue hyperlink that says "Need help logging in?". At the bottom of the page are three buttons: "Back", "Login", and "Cancel".

Order Summary Screen

The **Product and Property Selection** screen allows the user to select the **Property** (if multiple properties exist on the order), **Service Type**, **Transaction Type** and **Buyer / Seller Contacts**. User can also **Add Documents**, before submitting a request to Traditional Title Services.

Traditional Title - TraditionalTitleUAT2

Property and Product Selection

Search Type : ☒ Full ☐ Limited ☐ TaxSale/Resale *

Property Address

<input checked="" type="checkbox"/>	Address	City	Zip	County
<input checked="" type="checkbox"/>	244 Indial Lake Trail	Villa Rica	30180	Carroll

Buyers/Sellers

<input checked="" type="checkbox"/>	Code	Name
<input checked="" type="checkbox"/>	B	Bob Buyer

Settlement Date: 07/22/2022

Transaction Type: -Select- *

☒ Add to Proform Notes

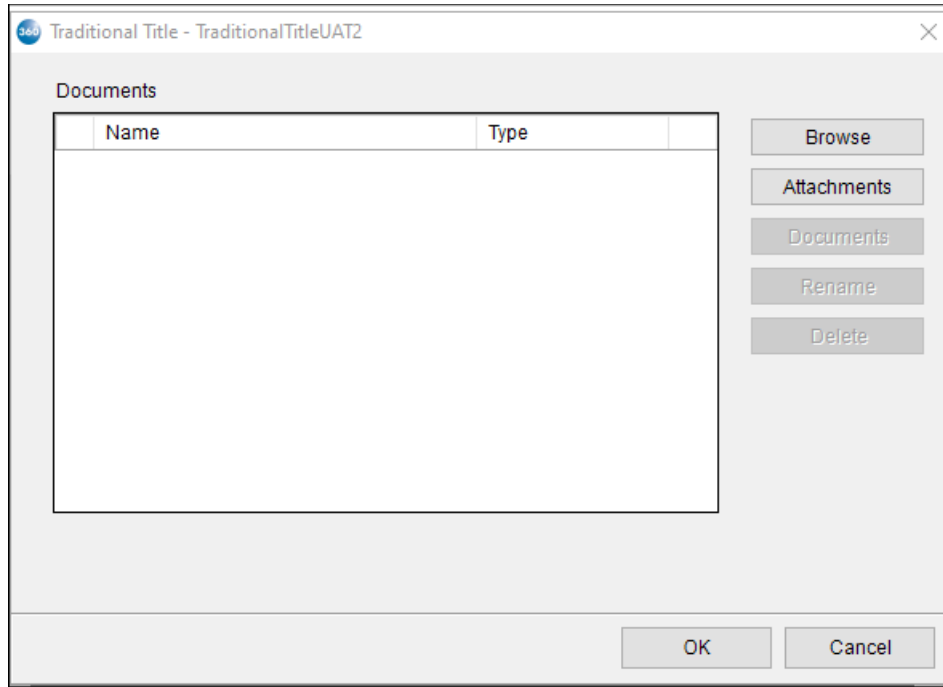
[Add Documents](#)

Back Submit Cancel

- **Property(s):** Information for the properties added within the ProForm order will populate into the fields.
 - Changes to the property information will have to be made within the ProForm order.
- **Settlement Date:** This date will auto populate from the date entered in the ProForm Order.
- **Search Type:** Select search type to be submitted with request.
- **Transaction Type:** Select transaction type to be submitted with request.
- **Notes:** Add a note to send with the request (Add to ProForm Notes is selected by Default)
- **Add Documents:** Click this link to add documents to be included in the request to Traditional Title Services. See the Attaching Document(s) section of this guide for more detail.

Attaching Document(s)

The **Add Document(s)** screen allows the user to attach documents before submitting the request to Traditional Title Services. After selecting documents, click **Close**:



- **Browse:** Browse to find documents to submit.
- **Attachments:** Attach documents from the ProForm order.
- **Documents:** This button is not applicable to Traditional Title Search transactions at this time.
- **Rename:** Rename the documents before submitting.
- **Delete:** Delete documents from the list of documents before submitting

Accepting Data & Document(s)

In the 360 queue the transaction status will show as **Ready** when data and documents have been sent from Traditional Title Search. The transaction status will be **Ready** which indicates a response has been received and is ready to be reviewed. The user will click **Next step** to review the data and documents.

Queue								
Next Step								
Views: Active Order								
Filters: All Providers								
Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On	Transaction Number	
Traditional...	Title Search	Ready	TraditionalTitleUAT3	Default	prashant cho...	6/22/2022 9:59 AM	410060-40-220622-232923	

Review Screen

The **Review** screen allows the user to view, copy, and accept documents from Traditional Title Search into the Select order.

- **View:** View documents sent from Traditional Title Search
- **Copy:** Save a copy of the document to the clipboard.
- **Accept:** Attach the document(s) to the Select order.
- **Overwrite Requirements/Exceptions:** When this option is checked, requirements and exceptions saved to the ProForm order will be removed and only the latest requirements and exceptions will be added to the ProForm order.

The screenshot shows a window titled "Review Traditional Title- TraditionalTitleUAT3". It has a toolbar with "Select All", "Select None", and "Field Codes". Below the toolbar is a "Groups" sidebar with a tree view containing "All", "Property", "Title", "Requirements", and "Exceptions". The main area is a table with columns: "Name", "Current Value", "New Value", and a clipboard icon. The table contains 17 rows of data, including "Legal Description", "Subdivision", "Lot", "Parcel", "Tax id", "Commitment Effective Date", and various "Requirements" and "Exceptions". At the bottom, there is a checkbox labeled "Overwrite Requirements/Exceptions" and two buttons: "Accept" and "Cancel".

<input checked="" type="checkbox"/>	Name	Current Value	New Value	
<input checked="" type="checkbox"/>	Legal Description	All that tract or parcel of land ...	All that tract or parcel of land ...	
<input checked="" type="checkbox"/>	Subdivision	Cardinal Ridge	Cardinal Ridge	
<input checked="" type="checkbox"/>	Lot	15	15	
<input checked="" type="checkbox"/>	Parcel	13137D D028	13137D D028	
<input checked="" type="checkbox"/>	Tax id	13137D D028	13137D D028	
<input checked="" type="checkbox"/>	Commitment Effective Date	9/3/2012 8:00:00 AM	9/3/2012 8:00:00 AM	
<input checked="" type="checkbox"/>	Requirements[12]/Description		2012 County Taxes due 11/...	
<input checked="" type="checkbox"/>	Requirements[13]/Description		2012 City Taxes not yet due ...	
<input checked="" type="checkbox"/>	Requirements[14]/Description		2011 County Taxes paid on ...	
<input checked="" type="checkbox"/>	Requirements[15]/Description		2011 City Taxes paid on 11/...	
<input checked="" type="checkbox"/>	Requirements[16]/Description		2013 not yet due and payable.	
<input checked="" type="checkbox"/>	Requirements[17]/Description		Payment, Cancellation or sati...	
<input checked="" type="checkbox"/>	Requirements[18]/Description		Payment, Cancellation or sati...	
<input checked="" type="checkbox"/>	Requirements[19]/Description		Payment, Cancellation or sati...	
<input checked="" type="checkbox"/>	Requirements[20]/Description		NOTE: Final policy will includ...	
<input checked="" type="checkbox"/>	Exceptions[9]/Description		NOTICE: The laws of the Sta...	

☐ Overwrite Requirements/Exceptions Accept Cancel

The accepted documents will be saved as attachments section of the ProForm order.

Updating a Transaction


In the 360 queue users can request an update for a transaction that has already been **Accepted**.

1. Click on **Next Step**
2. In the **Update** Screen enter the new **Settlement Date**
3. Add a **Note** to submit with the update request (Optional)
4. Add a **Document** to submit with the update request (Optional)
5. Click **Submit**

Queue							
Next Step		Views: Active Order	Filter: All Providers				
Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On	Transaction Number
Traditional...	Title Search	Accepted	TraditionalTitleUAT2	Default	prashant cho...	6/22/2022 9:56 AM	410060-40-220622-232922

360 Traditional Title - TraditionalTitleUAT2

Update



Property Address :

Oxford1 GA 06478

Search Type :

limited

County :

Baker

Transaction Type :

Refinance

Settlement Date :

Notes:

☒ Add to Proform Notes

[Add Documents](#)

Submit

Cancel


Canceling a Transaction

The user can click the **Cancel** option to cancel the transaction within 360 when the transaction is in an **In Progress** status.

Queue							
Next Step			Views: Active Order		Filter: All Providers		
Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On	Transaction Number
Traditional...	Title Search	In Progress	TraditionalTitleUAT4	Default	prashant cho...	6/22/2022 10:02 AM	410060-40-220622-232924

360 Traditional Title - TraditionalTitleUAT4

Cancel Request



Are you sure you want to cancel this request?

Cancellation Reason(required): ☒ Add to Proform Notes

Yes

No