

A.S.K. Services User Guide

October 1, 2024

Copyright and Licensing Information

Copyright © 1987–2024 by SoftPro, Raleigh, North Carolina.

No part of this publication may be reproduced in any form without prior written permission of SoftPro. For additional information, contact SoftPro, 4800 Falls of Neuse Road, Raleigh, NC 27609, or contact your authorized dealer.

Microsoft, Windows, and MS–DOS are registered trademarks of Microsoft Corporation in the United States and/or other countries. WordPerfect is a registered trademark of Corel Corporation. Crystal Reports is a registered trademark of SAP AG. HP LaserJet is a registered trademark of Hewlett Packard Development Company, L.P. GreatDocs is a registered trademark of Harland Financial Solutions Incorporated. RealEC Technologies, Inc. is majority owned by Lender Processing Services. All other brand and product names are trademarks or registered trademarks of their respective companies.

IMPORTANT NOTICE – READ CAREFULLY

Use of this software and related materials is provided under the terms of the SoftPro Software License Agreement. By accepting the License, you acknowledge that the materials and programs furnished are the exclusive property of SoftPro. You do not become the owner of the program, but have the right to use it only as outlined in the SoftPro Software License Agreement.

All SoftPro software products are designed to ASSIST in maintaining data and/or producing documents and reports based upon information provided by the user and logic, rules, and principles that are incorporated within the program(s). Accordingly, the documents and/or reports produced may or may not be valid, adequate, or sufficient under various circumstances at the time of production. UNDER NO CIRCUMSTANCES SHOULD ANY DOCUMENTS AND/OR REPORTS PRODUCED BE USED FOR ANY PURPOSE UNTIL THEY HAVE BEEN REVIEWED FOR VALIDITY, ADEQUACY AND SUFFICIENCY, AND REVISED WHERE APPROPRIATE, BY A COMPETENT PROFESSIONAL.

Table of Contents

Introduction	4
Launching A.S.K.	5
Access from the 360 Services Menu	5
Order Linking	5
Logging In	5
Submitting an Order	6
Specifying Order Data	6
Adding Documents	7
Tracking an Order After Submission	8
Opening a “Ready” Transaction	8
Working in the Review Screen	8
Viewing the Transaction Log	10
Updating an Order	11
Bringdown	11

Introduction

The A.S.K. Services Integration with SoftPro 360 allows users to seamlessly place orders for A.S.K. title products and receive the results of those orders within SoftPro 360. Features offered in the integration allow users to perform the following:

- Request A.S.K. title products
- Track the status of their requests
- View data returned from A.S.K.
- Preview documents returned from A.S.K.
- Accept and attach documents to their ProForm order
- Perform a bringdown/update on a title search

Launching A.S.K.

Access from the 360 Services Menu

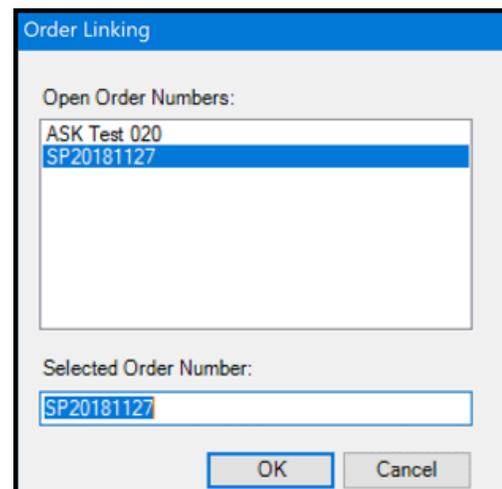
From the **360** → **Services** menu, double-click **A.S.K. Services – Title Production** located under the Title Services folder. This will open the Order Linking screen:



Order Linking

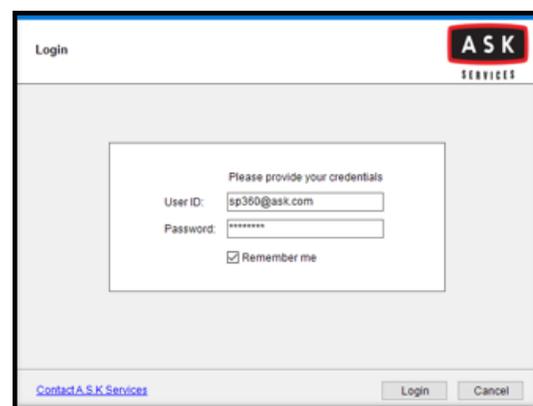
From the **Order Linking** screen, select the ProForm order to be sent to A.S.K.:

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 Login screen.



Logging In

The **Login** screen requires you to enter a valid **A.S.K. user name** and **password**. Check **“Remember Me”** to log in automatically when you launch the product in future sessions. If you do not currently have credentials, you will need to reach out to A.S.K. to get a user ID and password. Contact information can be found by clicking the **Contact A.S.K. Services** link which will take you directly to the A.S.K. Services website. Click **Login** to continue to the Data Selection screen:



Submitting an Order

Specifying Order Data

From the Login screen, navigate to the **Data Selection** screen where you will need to specify information for your order.

- **Ship To** – Select the appropriate office or person who is placing the order.
- **Product** – Select the title product you are requesting from A.S.K. Note that the products provided by A.S.K. will vary from state to state.
- **Property(s)** – Displays information for all properties in your order.
 - The minimum required fields for each property are: (1) Street Address or APN/Parcel ID, (2) State, (3) County and (4) City or Zip Code. If any of these values are missing, an error message will display upon login, and you will need to return to your ProForm order to add this information.
 - If the county in your order does not match any names listed in the County dropdown, you will be required to select one.
 - The checkbox next to each property allows you to indicate if it will be included in the order or not. At least one property must be submitted to A.S.K.
- **Notes** – Manually add instructions or comments about your order. Check **“Add to ProForm Notes”** to automatically add these notes to your ProForm order upon submitting your request.
- **Add Documents Link** – See the **Add Documents** section

A.S.K. Services - SP20181127

Data Selection

Ship To: Softpro region 1

Product: 2-Owner Search

Property(s):

<input checked="" type="checkbox"/>	Address	APN/Parcel ID	County
<input checked="" type="checkbox"/>	1234 Carriage Dr. Ann Arbor MI 48103	980082353	Mecosta
<input checked="" type="checkbox"/>	2101 Maple View Dr. Ann Arbor MI 48103		Mecosta

Notes: Add to ProForm Notes

[Add Documents](#)

Start Page Order SP20181127 x

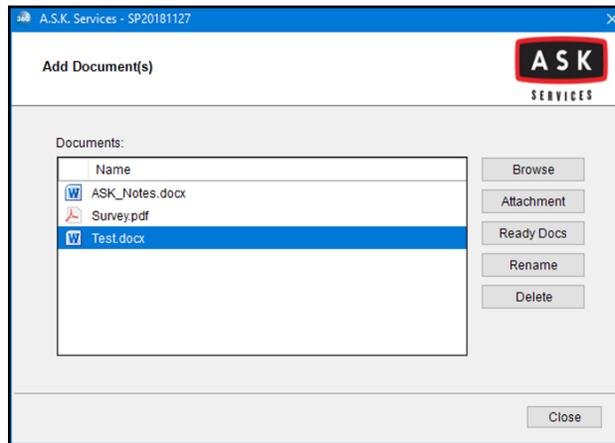
Express Order Entry

Notes (1)

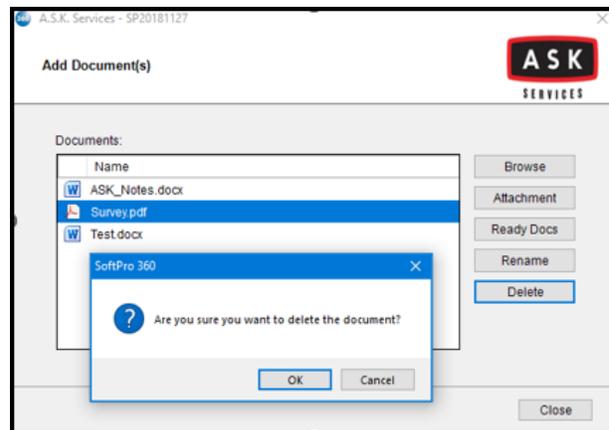
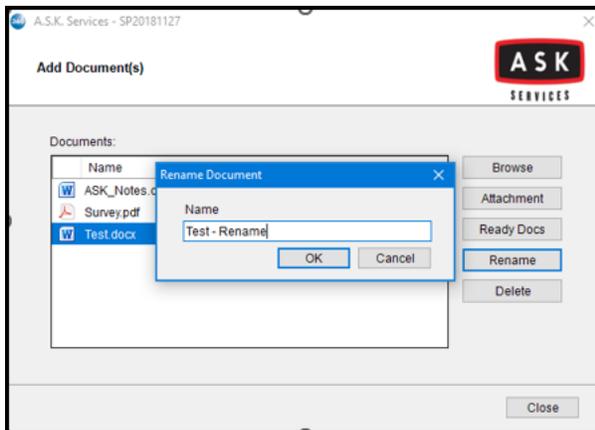
Created	Last Modified	Note
11/13/2018 10:...	Nory Pollock	To: A.S.K. Product Request: 2-Owner Search Note: Test notes

Adding Documents

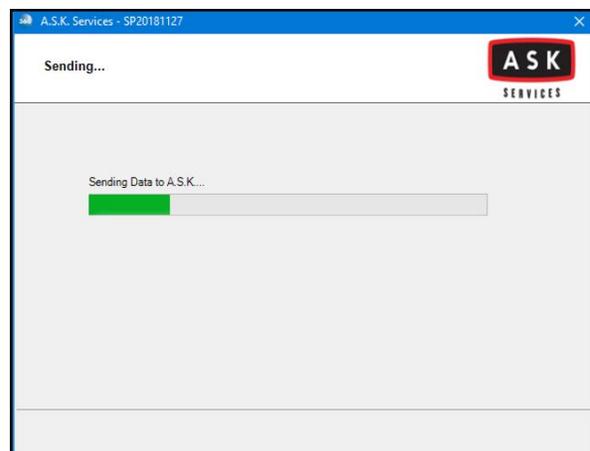
Clicking the **Add Documents** link on the Data Selection screen will navigate you to the “Add Documents” screen where you can attach documents to be sent along with your ProForm order to A.S.K. You can **browse** and select the document from your system, or you may select any documents **already attached** 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 **Close** to return to the “Data Selection” screen. Then, click **Submit** to send the order details to A.S.K. You will see the **Order Progress** screen which depicts that the order is being sent to A.S.K.



Tracking an Order After Submission

Opening a “Ready” Transaction

Within the SoftPro 360 queue, an **In Progress** transaction will be created when an order is submitted successfully to A.S.K. The **Linked Order** column will display your ProForm order number, and the **Description** column will display the property address. If you submitted more than one property in your order, each one will be reflected in the queue as separate transactions, allowing you to track when data and documents specific to each property are delivered to 360.

Provider	Service	Status	Linked Order	Category	Description	Transaction Number
A.S.K. Services	Title Production	In Progress	SP20181127	Title Services	2101 Maple View Dr. Ann Arbor MI 48103	410060-40-181206-149851
A.S.K. Services	Title Production	In Progress	SP20181127	Title Services	1234 Carriage Dr. Ann Arbor MI 48103	410060-40-181206-149850

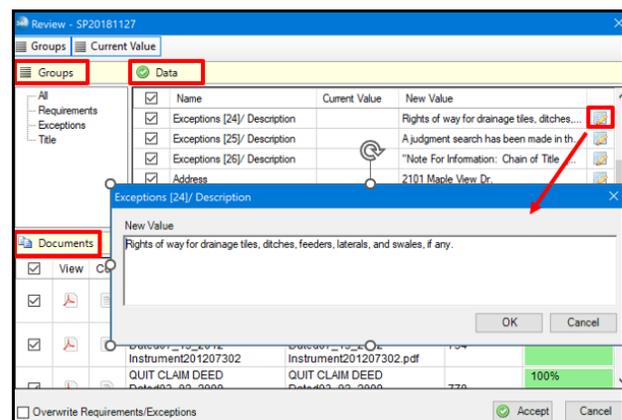
Once A.S.K. successfully returns title data and documents for a product request, the corresponding transaction will update to a **Ready** status. Clicking **Next Step** or double-clicking the transaction will open the Review screen where you can review this information and import it into your order.

Provider	Service	Status	Linked Order	Category	Description	Transaction Number
A.S.K. Services	Title Production	Ready	SP20181127	Title Services	2101 Maple View Dr. Ann Arbor MI 48103	410060-40-181206-149851
A.S.K. Services	Title Production	In Progress	SP20181127	Title Services	1234 Carriage Dr. Ann Arbor MI 48103	410060-40-181206-149850

Working in the Review Screen

From the Review screen, you can view the title data and documents returned by A.S.K. and specify those that you want to include in your ProForm order.

The **Groups** section of the screen displays the data tree. Selecting a branch of the tree will display only the data relevant to that branch. The **Data** section of the screen displays the name/description of each data item, the **Current Value** if it exists in the order, and the **New Value** sent by A.S.K. The **Edit** icon to the right of each line allows the user to open the **New Value** and edit it before importing it into the order.



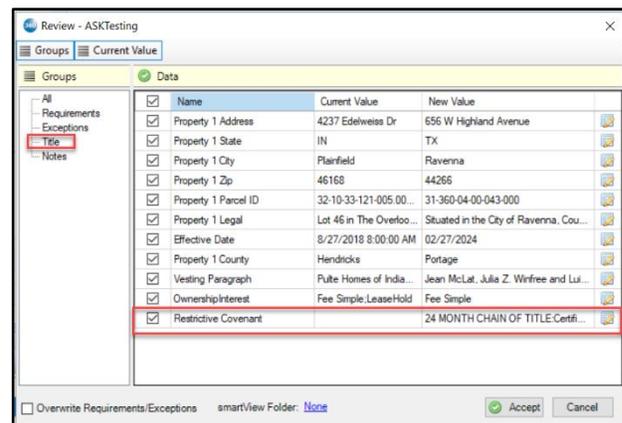
The **Documents** section of the Review screen displays the documents that may already be attached to your order's **Attachments**. The **View** icon  allows you to open and review the document prior to importing it into the order, and the **Copy** icon  allows you to copy and paste the document to your desktop.

By default, all documents and data are selected for import into the order. Any unchecked item will not be imported and will no longer be available for importing after the user clicks **Accept**. Clicking the **Accept** button sends the selected documents to your order's **Attachments**, and for any selected data, overwrites the Current Value with the New Value. Once the import is complete, the **Review** screen closes and the transaction status in the 360 Queue changes to **Accepted**.

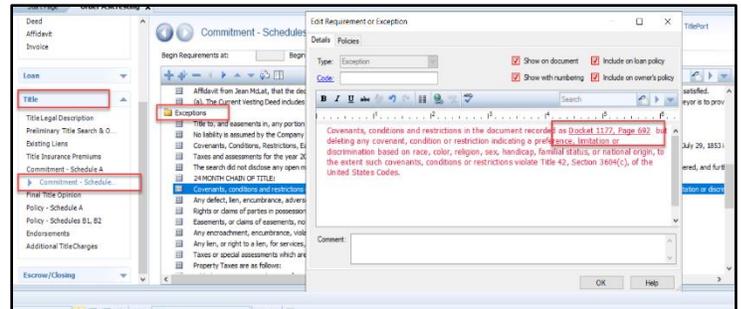
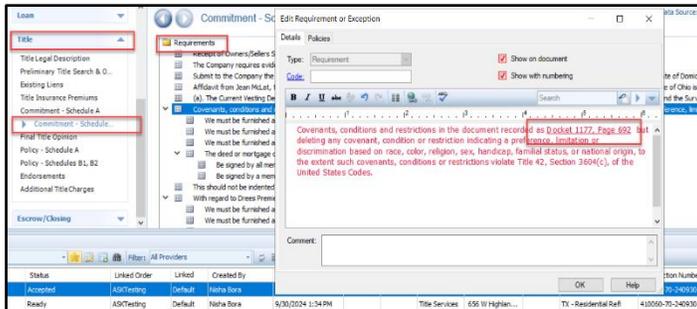
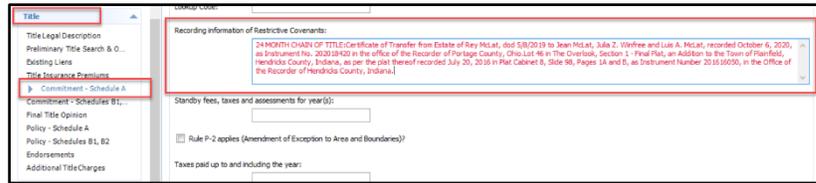
Note that if **“Overwrite Requirements/Exceptions”** is unchecked, the requirements and exceptions that are returned by A.S.K. will append to those that are already in the order. If it is checked, all the requirements and exceptions in the order will be overwritten.

If you choose to not accept any of the data and documents, click the **Cancel** button, and the Review screen will close. The transaction status will remain as **Ready**, which will allow you to return to the Review screen at a later time.

Note : When a Restrictive Covenant data is received and accepted for Texas properties, it will appear under the Title group on Review screen and saved in the proform order under Title- Commitment Schedule A, within the custom field.

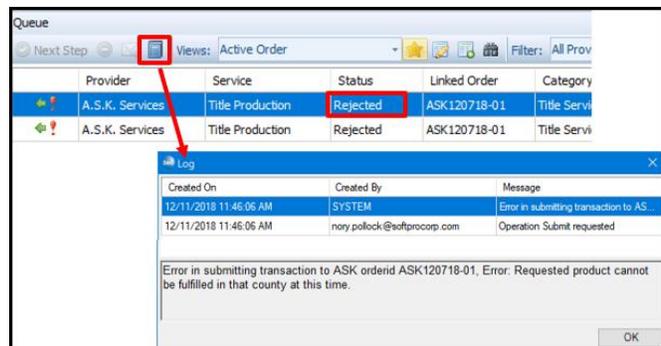


When a hyperlink URL is received and accepted in the requirements/exception, it will appear under Title- Commitment B1,B2 and users will have the ability to click on these hyperlinks to access the linked content directly.



Viewing the Transaction Log

To view a transaction's history, highlight the transaction and click the **Log** icon  from the 360 Queue. The Log will open and list a sequential record of all the transaction's activity beginning with the time you submitted your order to A.S.K. The most current activity will display at the top of the list.

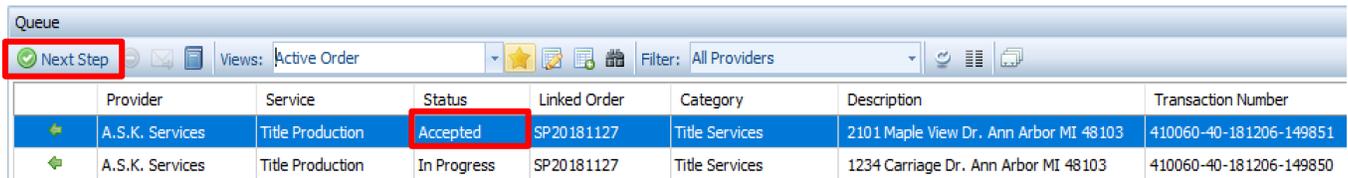


If your transaction has a **Rejected** status, the log will also provide the reason this transaction was rejected by A.S.K.

Updating an Order

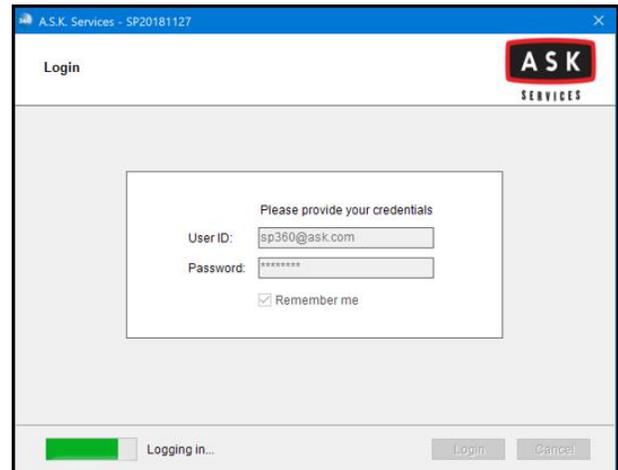
Bringdown

This integration also offers the ability to perform an update to your order. Specifically, a bringdown can be performed on a transaction that has a status of **Accepted** by highlighting the transaction and clicking the **Next Step** button.



Provider	Service	Status	Linked Order	Category	Description	Transaction Number
A.S.K. Services	Title Production	Accepted	SP20181127	Title Services	2101 Maple View Dr. Ann Arbor MI 48103	410060-40-181206-149851
A.S.K. Services	Title Production	In Progress	SP20181127	Title Services	1234 Carriage Dr. Ann Arbor MI 48103	410060-40-181206-149850

When you click **Next Step**, you will be prompted to provide your login credentials on the login screen. However, if you had checked the “Remember Me” checkbox during order creation, you will automatically be logged in and taken directly to the Bringdown Request screen.



A.S.K. Services - SP20181127

Login

ASK SERVICES

Please provide your credentials

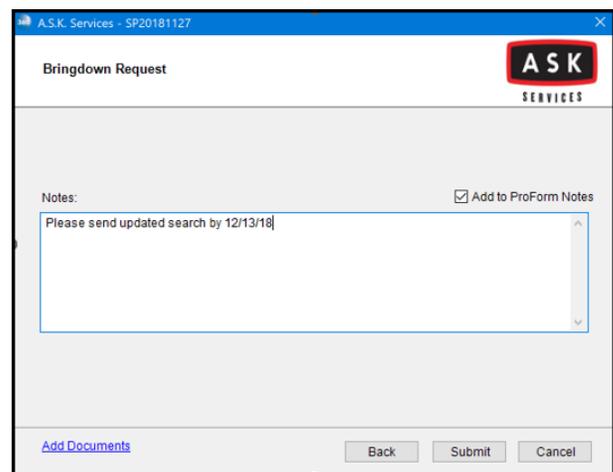
User ID:

Password:

Remember me

Logging in... Login Cancel

On the Bringdown Request screen, you can include specific instructions as well as documents and attachments (see Add Documents section) with your request to A.S.K. The “Add to ProForm Notes” option will also write the notes you include here to your ProForm order. The **Submit** button will send your bringdown request to A.S.K. For further details on how to track the status of your transaction, please go to the “Tracking an Order After Submission” section of this document.



A.S.K. Services - SP20181127

Bringdown Request

ASK SERVICES

Notes: Add to ProForm Notes

Add Documents Back Submit Cancel