

Association Online User Guide

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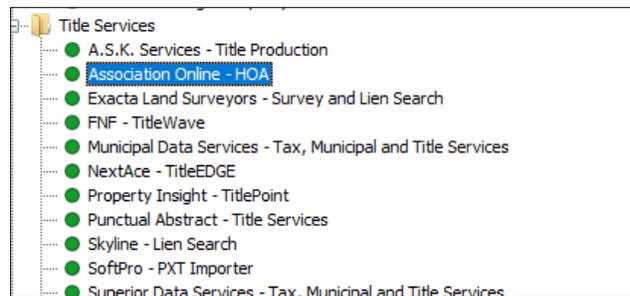
Introduction

Association Online Services allows agents to order Title Search products via SoftPro 360. The Association Online Services integration with SoftPro 360 provides users with the ability to seamlessly place orders for Association Online 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 Association Online Services all from within SoftPro 360.

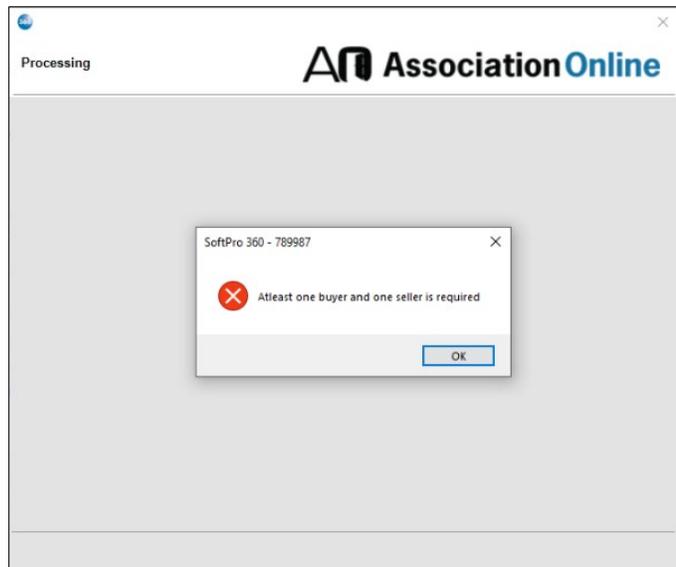
Accessing

From the **360 Services** menu, double-click **Association Online 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 **Association Online Services – Title Search**

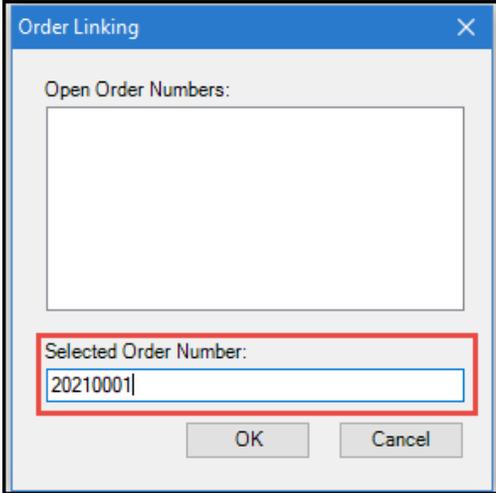


If the user does not have at least one buyer and one seller, the user will not be able to enter the integration.



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**:



Order Linking

Open Order Numbers:

Selected Order Number:

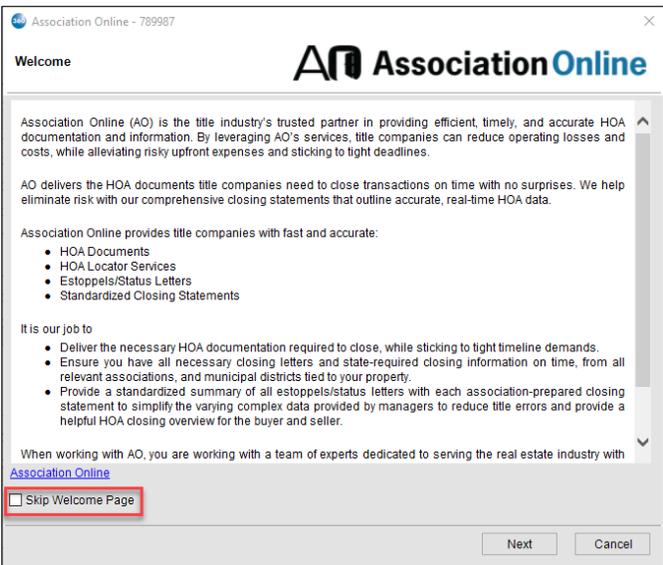
20210001

OK Cancel

Welcome Screen

After the user enters the integration, a Welcome Screen displays.

If this check box is selected, the screen will no longer display for the user, and the user will be taken to the **Login** screen every time they open the integration.



Association Online - 789987

Welcome

AO Association Online

Association Online (AO) is the title industry's trusted partner in providing efficient, timely, and accurate HOA documentation and information. By leveraging AO's services, title companies can reduce operating losses and costs, while alleviating risky upfront expenses and sticking to tight deadlines.

AO delivers the HOA documents title companies need to close transactions on time with no surprises. We help eliminate risk with our comprehensive closing statements that outline accurate, real-time HOA data.

Association Online provides title companies with fast and accurate:

- HOA Documents
- HOA Locator Services
- Estoppels/Status Letters
- Standardized Closing Statements

It is our job to

- Deliver the necessary HOA documentation required to close, while sticking to tight timeline demands.
- Ensure you have all necessary closing letters and state-required closing information on time, from all relevant associations, and municipal districts tied to your property.
- Provide a standardized summary of all estoppels/status letters with each association-prepared closing statement to simplify the varying complex data provided by managers to reduce title errors and provide a helpful HOA closing overview for the buyer and seller.

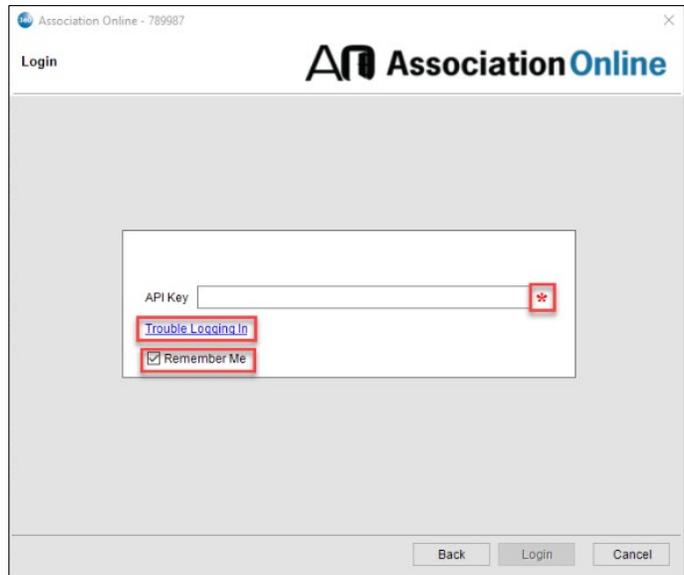
When working with AO, you are working with a team of experts dedicated to serving the real estate industry with [Association Online](#)

Skip Welcome Page

Next Cancel

Logging in to Association Online Search

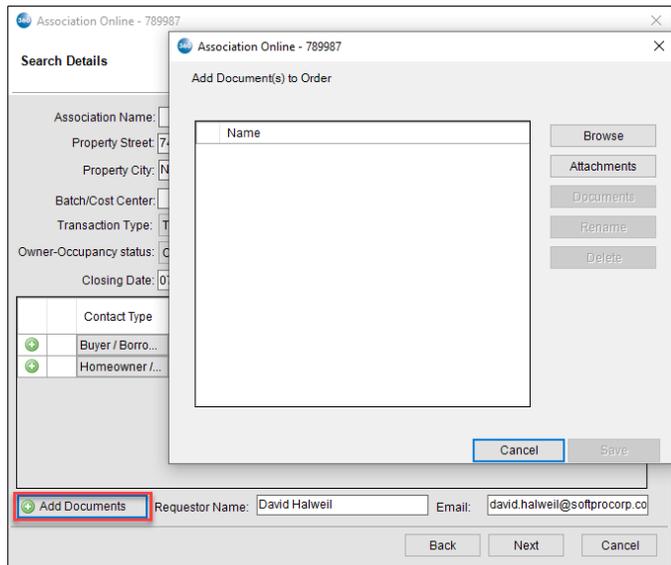
1. The **API Key** is required to login; this is provided by Association Online
2. Clicking the **Trouble Logging In** link will direct the user to a webpage for further assistance
3. Selecting the **Remember Me** check box will allow the API Key to be saved and automatically log the user in as long as the credentials are valid
4. Clicking the **Login** button opens the **Search Details** Screen



Search Details Screen

The **Search Details** screen allows the user to enter in the property and real-estate transaction information needed to complete the order such as Purchase Price, Transaction Type, Contact Types, etc. All required fields will have an asterisk next to it.

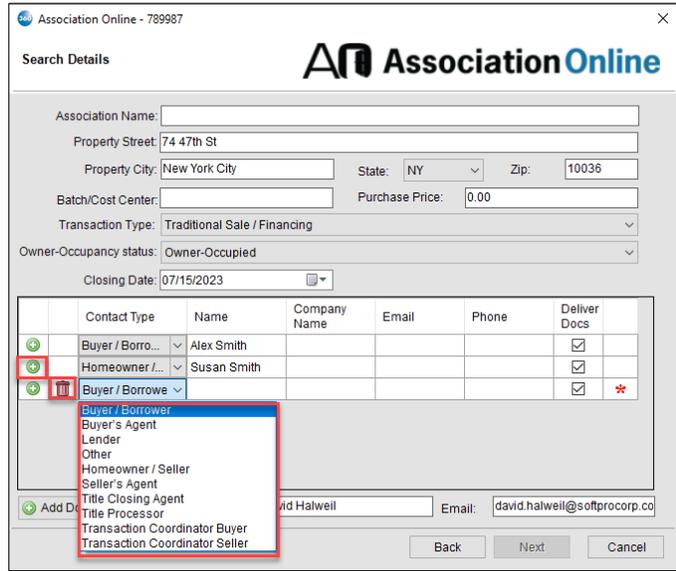
1. The user can click the **Add Documents** button to add Documents to the order either via their local computer (Browse), ProForm Attachments (Attachments), or their smartView folder (Documents).



2. User can also add a new Contact by clicking the **Add Contact**  icon and selecting a Contact Type from the drop-down list and click anywhere in the grid to add text under **Company Name** or **Email** as needed

a. The user can also delete the newly added contacts via the **Delete**  icon

NOTE: The Buyer and Seller are required and therefore you cannot delete those two Contact Types.



Association Online - 789987

Search Details

Association Name:

Property Street: 74 47th St

Property City: New York City State: NY Zip: 10036

Batch/Cost Center: Purchase Price: 0.00

Transaction Type: Traditional Sale / Financing

Owner-Occupancy status: Owner-Occupied

Closing Date: 07/15/2023

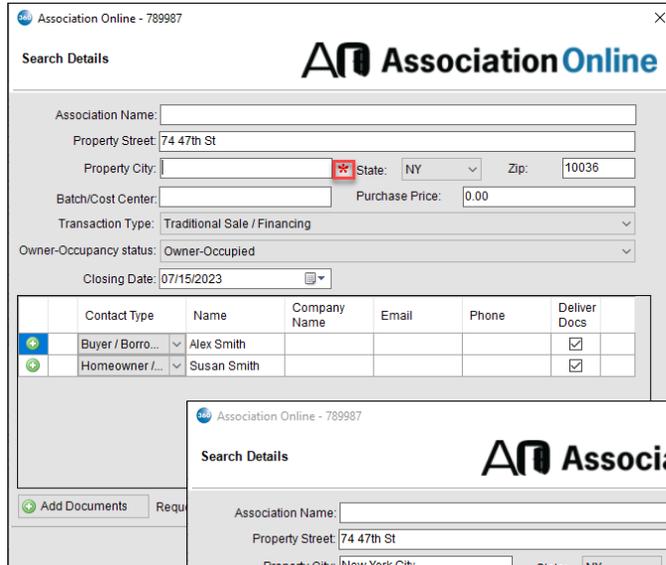
Contact Type	Name	Company Name	Email	Phone	Deliver Docs
Buyer / Borro...	Alex Smith				<input checked="" type="checkbox"/>
Homeowner / ...	Susan Smith				<input checked="" type="checkbox"/>
Buyer / Borrower					<input checked="" type="checkbox"/> *

Buyer / Borrower
Buyer's Agent
Lender
Other
Homeowner / Seller
Seller's Agent
Title Closing Agent
Title Processor
Transaction Coordinator Buyer
Transaction Coordinator Seller

Add Documents Requestor Name: David Halweil Email: david.halweil@softprocorp.co

Back Next Cancel

Required field example:



Association Online - 789987

Search Details

Association Name:

Property Street: 74 47th St

Property City: State: NY Zip: 10036

Batch/Cost Center: Purchase Price: 0.00

Transaction Type: Traditional Sale / Financing

Owner-Occupancy status: Owner-Occupied

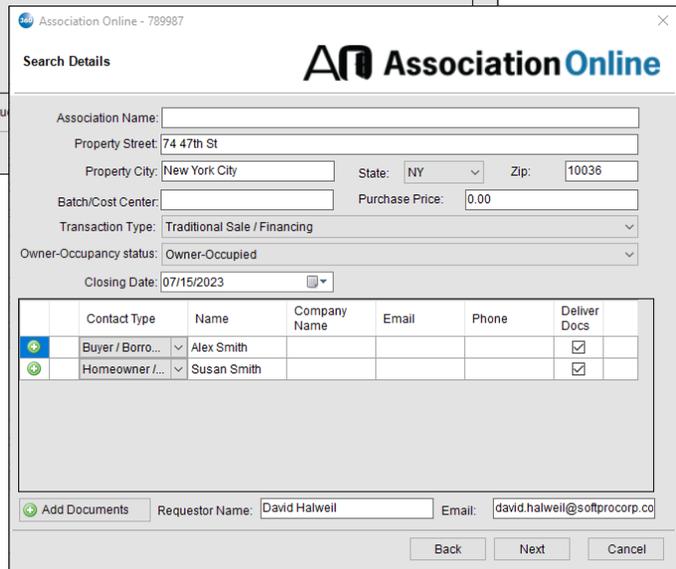
Closing Date: 07/15/2023

Contact Type	Name	Company Name	Email	Phone	Deliver Docs
Buyer / Borro...	Alex Smith				<input checked="" type="checkbox"/>
Homeowner / ...	Susan Smith				<input checked="" type="checkbox"/>

Add Documents Requestor Name: David Halweil Email: david.halweil@softprocorp.co

Back Next Cancel

All required fields completed example:



Association Online - 789987

Search Details

Association Name:

Property Street: 74 47th St

Property City: New York City State: NY Zip: 10036

Batch/Cost Center: Purchase Price: 0.00

Transaction Type: Traditional Sale / Financing

Owner-Occupancy status: Owner-Occupied

Closing Date: 07/15/2023

Contact Type	Name	Company Name	Email	Phone	Deliver Docs
Buyer / Borro...	Alex Smith				<input checked="" type="checkbox"/>
Homeowner / ...	Susan Smith				<input checked="" type="checkbox"/>

Add Documents Requestor Name: David Halweil Email: david.halweil@softprocorp.co

Back Next Cancel

- When all required fields are completed, clicking the **Next** button will navigate the user to the **Items Requested Page** screen

Items Requested Page Screen

The **Items Requested Page** screen allows the user to select the items they would like to request from Association Online.

- An asterisk will display as at least one of the items needs to be selected

- Selecting **HOA Documents Title Closing Package** will automatically select the following items:

- Budget
- Association Information Report
- By Laws
- Articles of Incorporation
- Covenants
- Rules/Regulations/Policies
- Financial Statements
- Board Meeting Minutes
- Annual Meeting Minutes

- 3. Selecting **Other** will require the user to enter in text in the free-text field below

The screenshot shows the 'Items Requested Page' in the Association Online system. The 'Select Items to Request' section has several checkboxes. The 'Other' checkbox is checked and highlighted with a red box. Below it is a text input field with a red asterisk icon, indicating it is required. Other options include 'HOA Documents Title Closing Package', 'Budget', 'Association Contact Information', 'Association Information Report', 'By Laws', 'Articles of Incorporation', 'Status Letter / Estoppel / Resale Cert', 'HOA Ledger', 'Lender Questionnaire', 'Covenants', 'Rules/Regulations/Policies', 'Financial Statements', and 'Board Meeting Minutes'. There are also fields for 'Status Letter Need by Date' (07/20/2023), 'Legal Description' (Commitment Legal), 'Special Instructions', and 'Notes'. At the bottom, there are 'Back', 'Submit', and 'Cancel' buttons.

- 4. Selecting **Status Letter / Estoppel / Resale Cert** then the **Legal Description** field is required

The screenshot shows the 'Items Requested Page' in the Association Online system. The 'Select Items to Request' section has several checkboxes. The 'Status Letter / Estoppel / Resale Cert' checkbox is checked and highlighted with a red box. Below it is a text input field with a red asterisk icon, indicating it is required. Other options include 'HOA Documents Title Closing Package', 'Budget', 'Association Contact Information', 'Association Information Report', 'By Laws', 'Articles of Incorporation', 'HOA Ledger', 'Lender Questionnaire', 'Covenants', 'Rules/Regulations/Policies', 'Financial Statements', and 'Board Meeting Minutes'. There are also fields for 'Status Letter Need by Date' (07/20/2023), 'Legal Description', 'Special Instructions', and 'Notes'. At the bottom, there are 'Back', 'Submit', and 'Cancel' buttons.

5. Selecting either **Property Information Report** or the **Unrecorded Liabilities/Municipal Lien Certificate** will require the user to select an item underneath either one of those categories
6. The **Status Letter Need By Date & Docs Need By Date** will always be one week ahead in the future
7. When all required fields are completed, clicking the **Submit** button sends the order to Association Online and displays a success message upon completion

Association Online - 789987

Items Requested Page

Association Online

Select Items to Request

HOA Documents Title Closing Package

Budget

Association Contact Information

Association Information Report

By Laws

Articles of Incorporation

Status Letter / Estoppel / Resale Cert

Status Letter Need by Date: 07/20/2023

Legal Description: Commitment Legal

Property Information Report

Basic Contact Report Amenities Closing Fees Asset Mgmt Account Status

Unrecorded Liabilities/Municipal Lien Certificate

Taxes Utilities Codes

Docs Need by Date: 07/20/2023

Back **Submit** Cancel

Association Online - 789987

Order Progress

Association Online

Sending Order to Association Online

SoftPro 360

Order submitted successfully!

OK

The transaction will display in the 360 Transaction **Queue** with a status of **In Progress**.

Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On	Completed On	Description	Transaction Number
Association Online	HOA	In Progr...	789987	Default	David Halweil	7/14/2023 11:52 AM		Status Letter / Estoppel / Resale C...	410060-60-230714-461142

Canceling the order

In the 360 queue the user can cancel with the order status of **In Progress**, **Ready**, or **Accepted** by clicking the **Cancel**  icon.

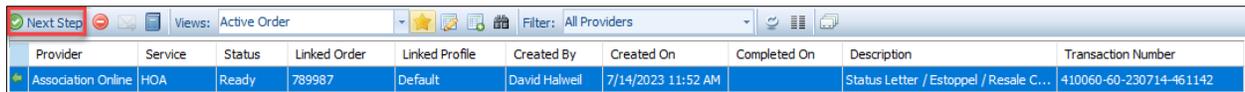


Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On	Completed On	Description	Transaction Number
Association Online	HOA	Ready	789987	Default	David Halwel	7/14/2023 11:52 AM		Status Letter / Estoppel / Resale C...	410060-60-230714-461142

The user will receive a notification requesting if the user is sure they wish to cancel the order and upon clicking **Yes**, the transaction will display a status of **Cancelled**.

Accepting Data & Document(s)

In the 360 queue the transaction status will show as **Ready** when data and documents have been sent from Association Online. 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.



Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On	Completed On	Description	Transaction Number
Association Online	HOA	Ready	789987	Default	David Halwel	7/14/2023 11:52 AM		Status Letter / Estoppel / Resale C...	410060-60-230714-461142

Review Screen

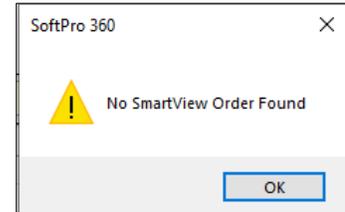
The **Review** screen allows the user to view, copy, and accept documents from Association Online into the Select ProForm Order.

- **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
- A smartview order must be created for the documents
 - The accepted documents will be saved in the smartview order

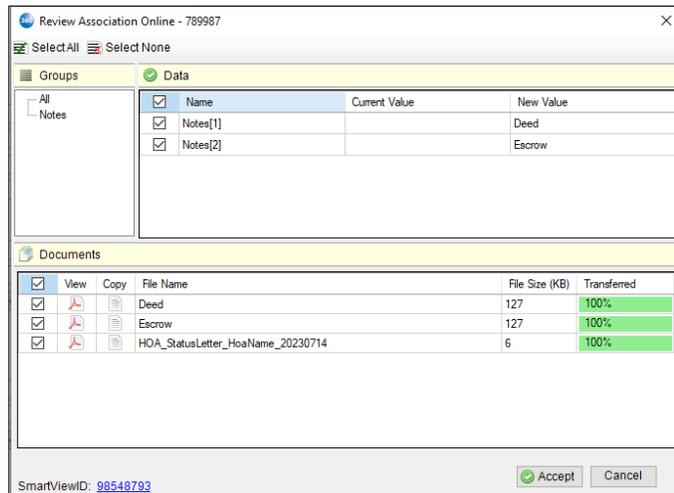
- The **Review** screen will detect to ensure you have a smartview order so you know to create one



- If one is not found, the following message will display



- If the user has a smartview order or has then created one, the user can proceed to **Accept** the data and documents.



- The transaction will display in the 360 Transaction **Queue** with a status of **Accepted**.

Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On	Completed On	Description	Transaction Number
Association Online	HOA	Accepted	789987	Default	David Halweil	7/14/2023 11:52 AM		Status Letter / Estoppel / Resale Cert	410060-60-230714-461142

NOTE: After 90 days of not receiving any data or documents from Association Online, the transaction status will update to **Completed**, meaning no further actions can be taken on that transaction.