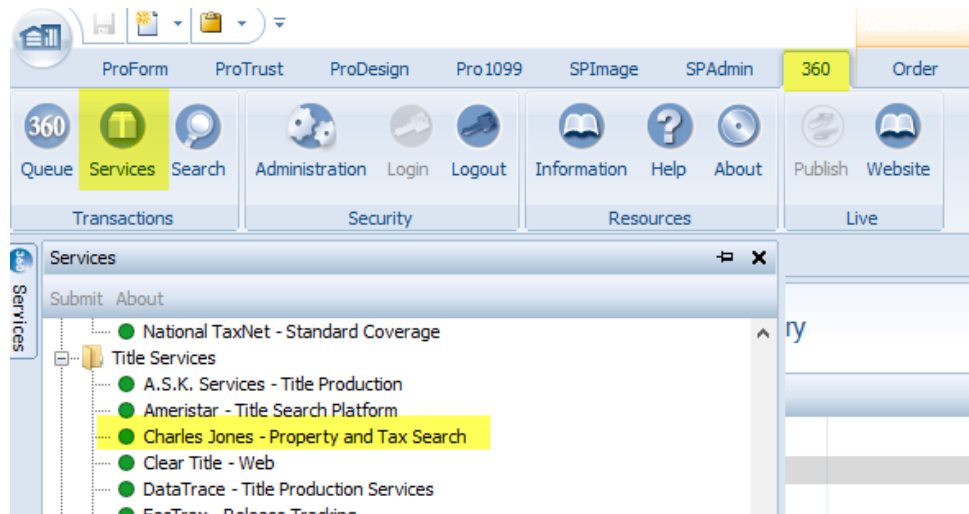


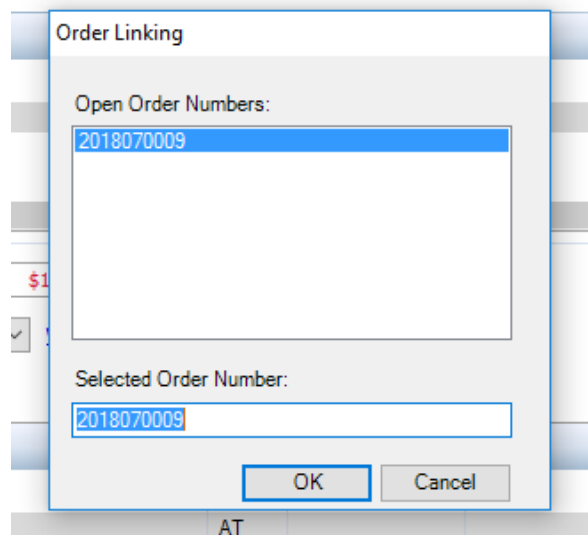
Managing Charles Jones Orders in SoftPro 360

How to submit an order to Charles Jones

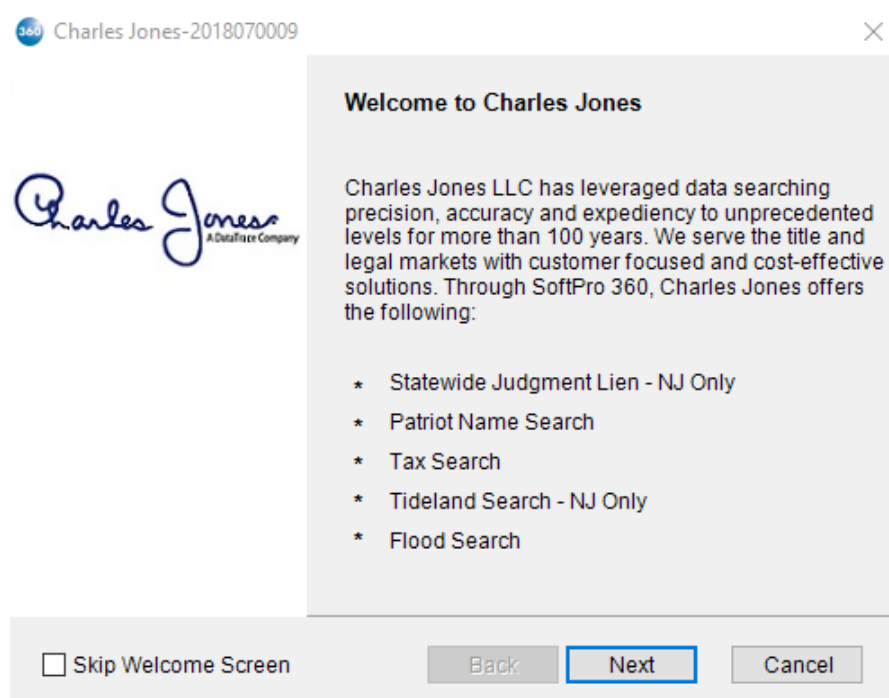
Charles Jones, a title services vendor, can be found under the service **Title Services**. Double click on **Charles Jones**, or highlight and click on the **Submit** button, to submit a transaction to this vendor.



If you already have ProForm order(s) open, they will be listed in the **Order Linking** dialog. The current active order will be highlighted and entered in the **Selected Order Number** field. You have the ability to select from any of these orders, or you may choose to overwrite the **Selected Order Number** with an order that is not currently open. Click **OK** to continue to the next screen.




The welcome screen will provide some basic information about **Charles Jones**. To skip this screen in the future, click the **Skip Welcome Screen** option at the bottom of the screen. Click **Next** to continue.



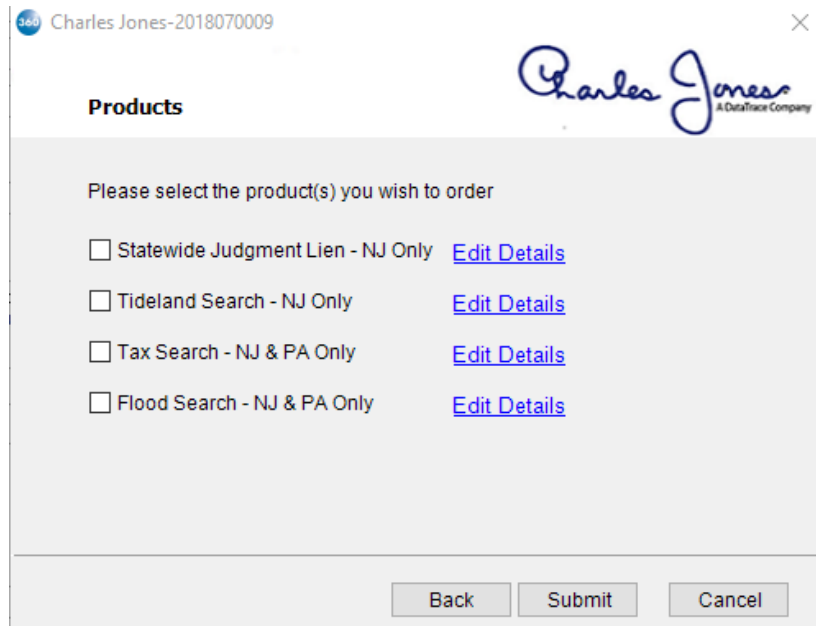
A software window titled "Charles Jones-2018070009" with a close button in the top right corner. The window displays a "Welcome to Charles Jones" message. On the left is the Charles Jones logo, which includes the text "Charles Jones" in a script font and "A DataTrac Company" in a smaller font below it. The main text area says: "Charles Jones LLC has leveraged data searching precision, accuracy and expediency to unprecedented levels for more than 100 years. We serve the title and legal markets with customer focused and cost-effective solutions. Through SoftPro 360, Charles Jones offers the following:" followed by a bulleted list: "Statewide Judgment Lien - NJ Only", "Patriot Name Search", "Tax Search", "Tideland Search - NJ Only", and "Flood Search". At the bottom, there is a checkbox labeled "Skip Welcome Screen", and three buttons: "Back", "Next" (which is highlighted with a blue border), and "Cancel".

Existing users enter your **Charles Jones** user name and password (and Firm Number if applicable). New users can contact customer service via email or the number listed. Click **Next** to continue.



A software window titled "Charles Jones-2018070009" with a close button in the top right corner. The window displays a "Charles Jones Login" screen. The Charles Jones logo is in the top right corner. The main heading is "Charles Jones Login". Below it, the text says "Provide your Charles Jones account information". There are three input fields: "Username:" with a text box, "Password:" with a text box and a red asterisk to its right, and "Firm Number:" with a text box. At the bottom, there is a message: "For assistance, contact Charles Jones Customer Service at 800-792-8888 or email custsrv@charlesjones.com". At the very bottom are three buttons: "Back", "Next", and "Cancel".

The **Products** screen will show you available products. Click **Edit Details** to review the required information for the selected product.

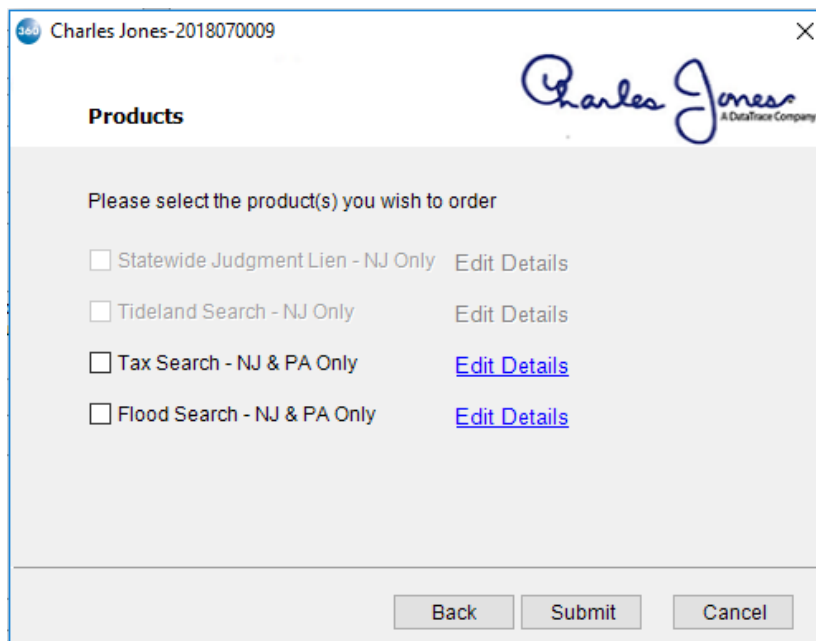


A screenshot of a web application window titled "Charles Jones-2018070009". The window features the Charles Jones logo (A DataTrac Company) in the top right corner. Below the title bar, the heading "Products" is displayed. The main content area contains the instruction "Please select the product(s) you wish to order" followed by four product options, each with an unchecked checkbox and an "Edit Details" link:

- ☐ Statewide Judgment Lien - NJ Only [Edit Details](#)
- ☐ Tideland Search - NJ Only [Edit Details](#)
- ☐ Tax Search - NJ & PA Only [Edit Details](#)
- ☐ Flood Search - NJ & PA Only [Edit Details](#)

At the bottom of the window, there are three buttons: "Back", "Submit", and "Cancel".

Note: The products **Statewide Judgment Lien** and **Tideland Search** are only available for NJ properties.



A second screenshot of the same "Charles Jones-2018070009" web application window. The layout is identical to the first screenshot, showing the "Products" section with the same four product options and "Edit Details" links. The "Back", "Submit", and "Cancel" buttons are also present at the bottom.

Note: The products **Statewide Judgment Lien** and **Tideland Search** will not be available for a PA order.

NOTE: * is a required field and must be filled in to continue to the next screen.

Statewide Judgment Lien Details for NJ Properties Only:

The **Statewide Judgment Lien Details** screen will show all buyers/borrowers (refinance) or all sellers (purchase) contact information, depending on the transaction type. You can select to add the **Patriot Search**, do an **Exact Name Search** and can also designate the **Search Period**.

Include	Name	Patriot Search	Exact Search
<input checked="" type="checkbox"/>	Mike Homes	<input type="checkbox"/>	<input type="checkbox"/>

Name: Mike Homes
Type: Individual
Qualifier: None
Search Period: Years: 20 Years
From: 8/ 1/1996 To: 8/ 1/2016
Comments:

Back Save Cancel

If you need to add additional Buyers/Borrowers or Sellers click on the **Add New Borrower or Seller** button, or the **Show all Borrower/Sellers** button.

Include	Name	Patriot Search	Exact Search
<input checked="" type="checkbox"/>	Mike Homes	<input type="checkbox"/>	<input type="checkbox"/>

Name: Mike Homes
Type: Individual
Qualifier: None
Search Period: Years: 20 Years
From: 8/ 1/1996 To: 8/ 1/2016
Comments:

Back Save Cancel

Add a new Borrower or Seller

Deposit (501)	Disb. as Proceeds (507 Description)
	Dep. disbursed as proceeds

Charles Jones-2018070009

Statewide Judgment Lien Details

Charles Jones
A DataTrac Company

Include	Name	<input type="checkbox"/> Patriot Search	<input type="checkbox"/> Exact Search
<input checked="" type="checkbox"/>	Mike Homes	<input type="checkbox"/>	<input type="checkbox"/>

Search Period

Name: Mike Homes

Type: Individual

Qualifier: None

Comments:

Years: 20 Years

From: 8/ 1/1996 To: 8/ 1/2016

Back Save Cancel

Show all Borrowers or Sellers

Deposit (501)	Disb. as Proceeds (507 Description)
	Dep. disbursed as proceeds

Tideland Product for NJ Only:

The **Tideland Property Details** screen will populate with the **State, County, Municipality, Owner, Street Address, Block, and Lot** in your ProForm order. Enter a **Qualifier** if applicable. Click **Next** to continue to the next screen.

Charles Jones-2018070009

Tideland Property Details

Charles Jones
A DataTrac Company

State: NJ

County: MORRIS

Municipality: ALL

Owner: Mike Homes

Street Address: 1512

Block: 5

Lot: 10

Qualifier:

Back Next Cancel

Select an option for **Include Map For**, and enter any special instructions. Click **Save** to return to the **Product Selection** Screen.

Charles Jones-2018070009

Charles Jones
A DataTrac Company

Tideland Search Details

Include Map For

☒ Claimed Properties Only

☐ Claimed & Unclaimed Properties

☐ No Map Required

Special Instructions:

Back Save Cancel

Tax Search for NJ or PA:

The **Tax Search Property Details** screen allows you to order a search for either PA or NJ. Depending on the state you select the information on the next screen will vary.

Charles Jones-2018070009

Charles Jones
A DataTrac Company

Tax Search Property Details

State: NJ

County: --Not Selected--

Municipality: ALL

Owner: Mike Homes

Street Address: 1512

Block: 5

Lot: 10

Qualifier:

Back Next Cancel

Charles Jones-2018070009

Tax Search Property Details

State: PA

County: MERCER

Municipality: ALL

Owner: Mike Homes

Street Address: 1512

Parcel Number:

Back Next Cancel

NJ Tax Search Screen

Select the **Certificate Style**, **Search Type**, **Date Needed** and enter any **Special Instructions**. Click **Save** to close this screen and return to the **Product Selection** screen. Click **Cancel** to cancel out of this screen and return to the **Product Selection** screen.

Charles Jones-2018070009

NJ Tax Search

Certificate Style

☒ Classic/Contemporary

☐ Traditional

Search Type

☒ Assessment Search ☒ Utility Search

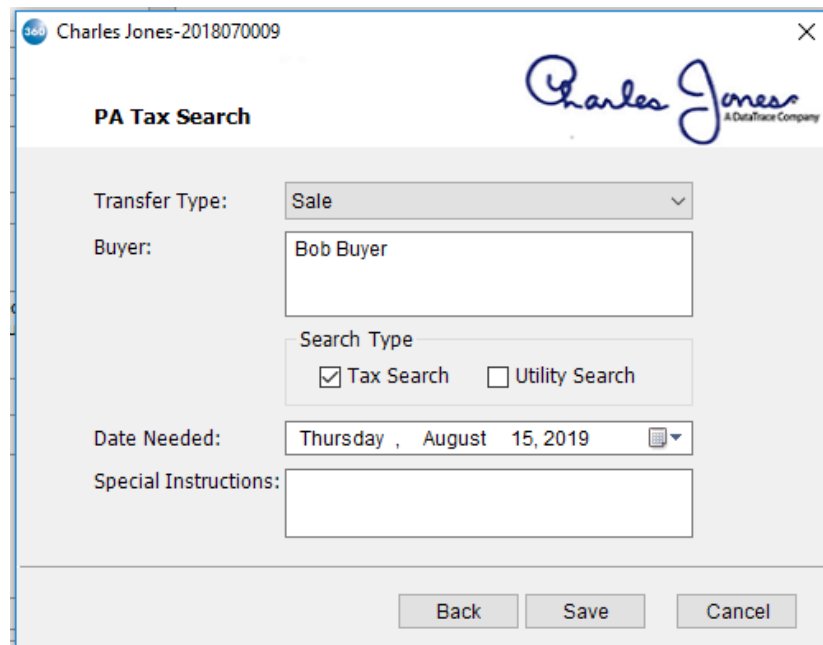
Date Needed: Monday , August 12, 2019

Special Instructions:

Back Save Cancel

PA Tax Search Screen

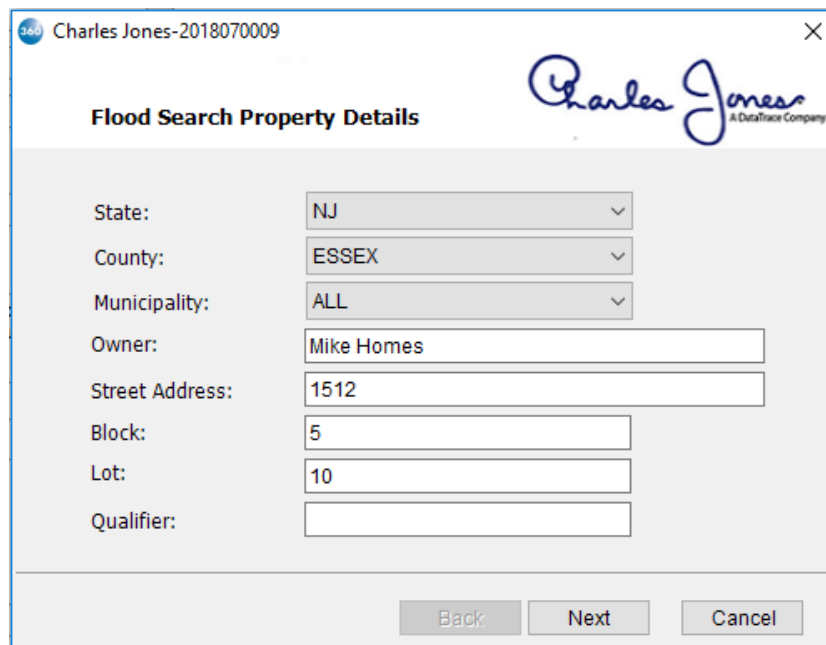
The **Transfer Type** and **Buyer** name will populate with information from your ProForm Order. Select the **Search Type**, **Date Needed**, and enter any **Special Instructions**. Click **Save** to return to the **Product Selection** screen.



The screenshot shows a software window titled "Charles Jones-2018070009" with a close button (X) in the top right corner. The window contains the "PA Tax Search" form. At the top right of the form is the "Charles Jones A DataTrac Company" logo. The form fields are: "Transfer Type:" with a dropdown menu showing "Sale"; "Buyer:" with a text box containing "Bob Buyer"; "Search Type" with two checkboxes, "Tax Search" (checked) and "Utility Search" (unchecked); "Date Needed:" with a date picker showing "Thursday , August 15, 2019"; and "Special Instructions:" with an empty text box. At the bottom of the form are three buttons: "Back", "Save", and "Cancel".

Flood Search for NJ Properties:

The **Flood Search Property Details** screen will populate the **State**, **County**, **Municipality**, **Owner**, **Street Address**, **Block**, and **Lot** in your ProForm order. Enter a **Qualifier** if applicable. Click **Next** to continue.



The screenshot shows a software window titled "Charles Jones-2018070009" with a close button (X) in the top right corner. The window contains the "Flood Search Property Details" form. At the top right of the form is the "Charles Jones A DataTrac Company" logo. The form fields are: "State:" with a dropdown menu showing "NJ"; "County:" with a dropdown menu showing "ESSEX"; "Municipality:" with a dropdown menu showing "ALL"; "Owner:" with a text box containing "Mike Homes"; "Street Address:" with a text box containing "1512"; "Block:" with a text box containing "5"; "Lot:" with a text box containing "10"; and "Qualifier:" with an empty text box. At the bottom of the form are three buttons: "Back", "Next", and "Cancel".

Verify the **Flood Search Type** and **Lender Information** then click **Save** to return to the **Product Selection** screen.

A screenshot of a software window titled 'Charles Jones-2018070009' with a close button in the top right. The window contains a form titled 'Flood Search Lender Details' with the Charles Jones logo in the top right. The form fields are: 'Flood Search Type' (dropdown menu showing 'Basic'), 'Lender Name' (text box with 'SoftPro Bank'), 'Lender Address' (text box with '123 Bank Lane'), 'Lender Address2' (empty text box), 'City, State, Zip' (three fields: 'Raleigh', 'NC', and '27613-'), 'Lender ID' (empty text box), 'Loan ID' (text box with '1112221515'), and 'Special Instructions' (empty text box). At the bottom are three buttons: 'Back', 'Save', and 'Cancel'.

Flood Search for PA Properties:

The **Flood Search Property Details** Screen will populate the **State, County, Municipality, Owner, Street Address, Block, and Parcel Number** in your ProForm order. Click **Next** to continue.

A screenshot of a software window titled 'Charles Jones-2018070009' with a close button in the top right. The window contains a form titled 'Flood Search Property Details' with the Charles Jones logo in the top right. The form fields are: 'State' (dropdown menu showing 'PA'), 'County' (dropdown menu showing '--Not Selected--'), 'Municipality' (dropdown menu showing 'ALL'), 'Owner' (text box with 'Mike Homes'), 'Street Address' (text box with '1512'), 'Zip' (text box with '06336'), and 'Parcel Number' (empty text box). At the bottom are three buttons: 'Back', 'Next', and 'Cancel'.

Verify the **Flood Search Type** and **Lender Information** then click **Save** to return to the **Product Selection** screen.

The screenshot shows a software window titled "Charles Jones-2018070009" with a close button (X) in the top right corner. The window contains the "Charles Jones A DataTrace Company" logo. The main heading is "Flood Search Lender Details". Below this, there are several input fields: "Flood Search Type:" with a dropdown menu showing "Basic"; "Lender Name:" with a text box containing "SoftPro Bank"; "Lender Address:" with a text box containing "123 Bank Lane"; "Lender Address2:" with an empty text box; "City, State, Zip:" with three separate boxes containing "Raleigh", "NC", and "27613-"; "Lender ID:" with an empty text box; "Loan ID:" with a text box containing "112221515"; and "Special Instructions:" with a large empty text box. At the bottom right, there are three buttons: "Back", "Save", and "Cancel".

You may select to order multiple products, then click **Submit**.

The screenshot shows a software window titled "Charles Jones-2018070009" with a close button (X) in the top right corner. The window contains the "Charles Jones A DataTrace Company" logo. The main heading is "Products". Below this, there is a text prompt: "Please select the product(s) you wish to order". There are four product options, each with a checked checkbox, a product name, a link to "Edit Details", and a green checkmark: "Statewide Judgment Lien - NJ Only", "Tideland Search - NJ Only", "Tax Search - NJ & PA Only", and "Flood Search - NJ & PA Only". At the bottom right, there are three buttons: "Back", "Submit", and "Cancel".

Each product ordered will show in the SoftPro 360 Queue as a separate transaction.

Queue							
Next Step		Views: Active Order		Filter: All Providers		(250) New Transact	
	Transaction Number	Provider	Service	Status	Linked Order	Linked Profile	Cre
➡	410060-30-190808-099584	Charles Jones	Property and Tax Search	In Progress	2018070009	Default	Kristi
➡	410060-30-190808-099583	Charles Jones	Property and Tax Search	In Progress	2018070009	Default	Kristi
➡	410060-30-190808-099582	Charles Jones	Property and Tax Search	In Progress	2018070009	Default	Kristi
➡	410060-30-190808-099581	Charles Jones	Property and Tax Search	In Progress	2018070009	Default	Kristi

How to Cancel a Charles Jones Transaction

While your transaction status is **In Progress**, you can **Cancel** the transaction. Highlight the transaction in the SoftPro 360 Queue and click the **Cancel** icon.



Transaction Number	Provider	Service	Status	Linked Order	Linked Profile	Cre
410060-30-190808-099584	Charles Jones	Property and Tax Search	In Progress	2018070009	Default	Kristi
410060-30-190808-099583	Charles Jones	Property and Tax Search	Ready	2018070009	Default	Kristi
410060-30-190808-099582	Charles Jones	Property and Tax Search	Ready	2018070009	Default	Kristi
410060-30-190808-099581	Charles Jones	Property and Tax Search	Ready	2018070009	Default	Kristi

The following message will appear. Select **I Agree** and click **Submit** to continue.

Charles Jones-2018070009

Cancel

This will cancel the transaction in your SoftPro 360 Queue only. To cancel the transaction with Charles Jones you must contact Charles Jones Customer Service at 800-792-8888.

☐ I Agree

Back

Submit

Close

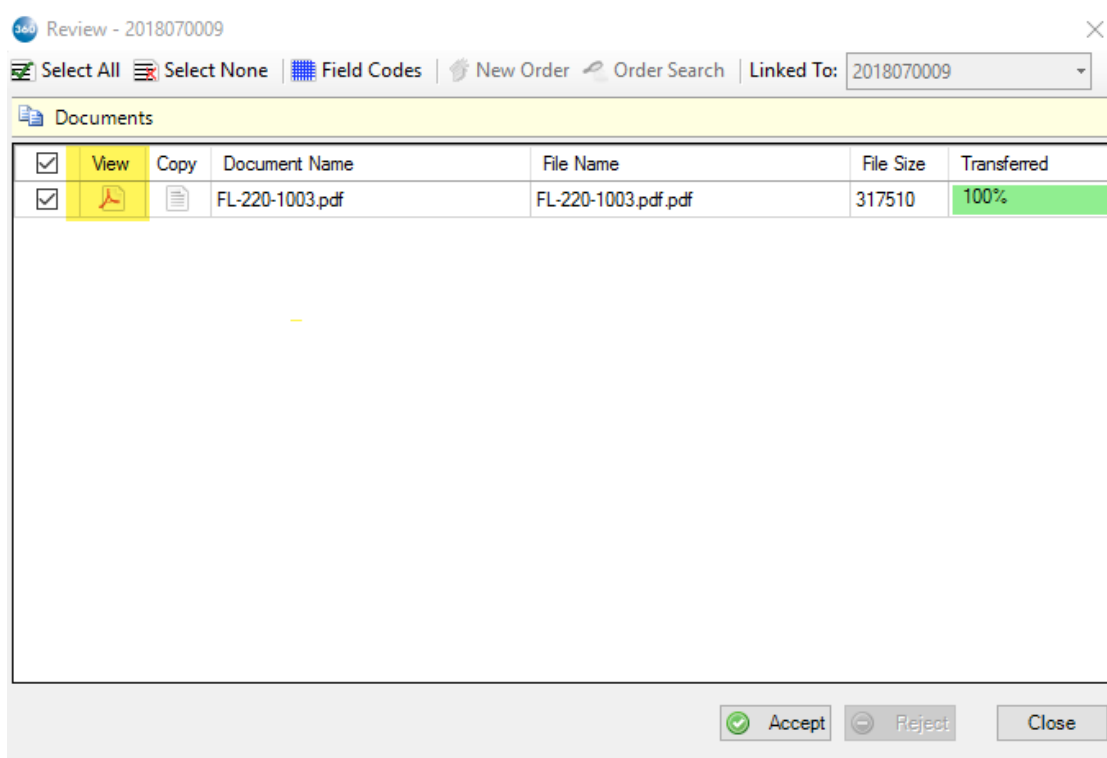
NOTE: This will only change the status in your SoftPro 360 Queue this will not cancel the transaction with Charles Jones, you will need to contact Charles Jones Customer Service to cancel the transaction with them.

Reviewing and accepting your transaction

Once your transaction has been processed by **Charles Jones**, the status in the SoftPro360 Queue will change to **Ready**. In your 360 Queue, you may double click the transaction to review and accept it:

Transaction Number	Provider	Service	Status	Linked Order	Linked Profile	Cre
410060-30-190808-099584	Charles Jones	Property and Tax Search	In Progress	2018070009	Default	Krist
410060-30-190808-099583	Charles Jones	Property and Tax Search	Ready	2018070009	Default	Krist
410060-30-190808-099582	Charles Jones	Property and Tax Search	Ready	2018070009	Default	Krist
410060-30-190808-099581	Charles Jones	Property and Tax Search	Ready	2018070009	Default	Krist

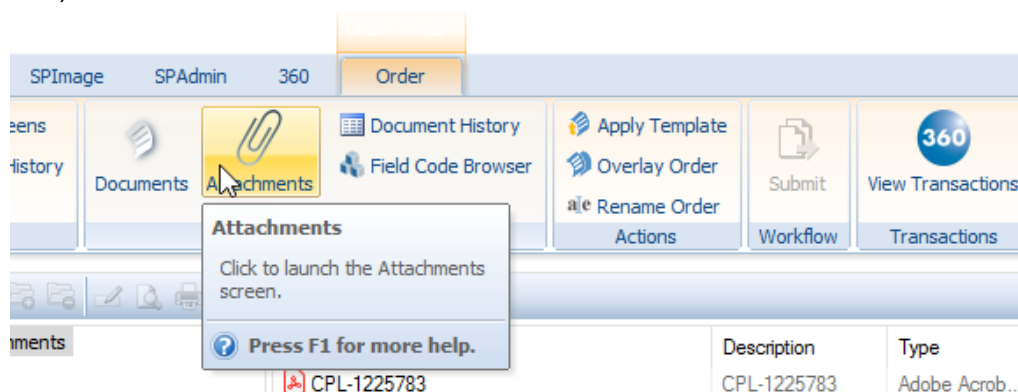
To view Document(s) returned by **Charles Jones**, double click the transaction, then at the **Review Screen**, click the **View** button:



You may View the documents and then click **Accept**, when finished viewing. The order status will be updated to **Accepted** in SoftPro 360 Queue:

➡	410060-30-190808-099586	Charles Jones	Property and Tax Search	Ready	2018070009
➡	410060-30-190808-099585	Charles Jones	Property and Tax Search	Accepted	2018070009
➡	410060-30-190808-099584	Charles Jones	Property and Tax Search	Ready	2018070009

The accepted document(s) will be available to you, within your ProForm order, by selecting **Order** from the Menu Bar, then **Attachments**:



Requesting an update

To request an update from the 360 Queue, you may double click the transaction or highlight the transaction and click **Next Step**. Either of these functions will open the **Update Screen**.

Queue				
<div> Next Step Views: Active Order Filter: All Providers </div>				
	Transaction Number	Provider	Service	Status
➡	410060-30-190808-099585	Charles Jones	Property and Tax Search	Accepted
⬅	410060-30-190808-099584	Charles Jones	Property and Tax Search	Accepted

From the **Update Screen**, select **Order an Updated Report** and click **Next**.

Charles Jones-2018070009

Charles Jones

A DataTrace Company

Update

Provide your Charles Jones account information

Username: softpro

Password: ****

Firm Number:

Update or Close

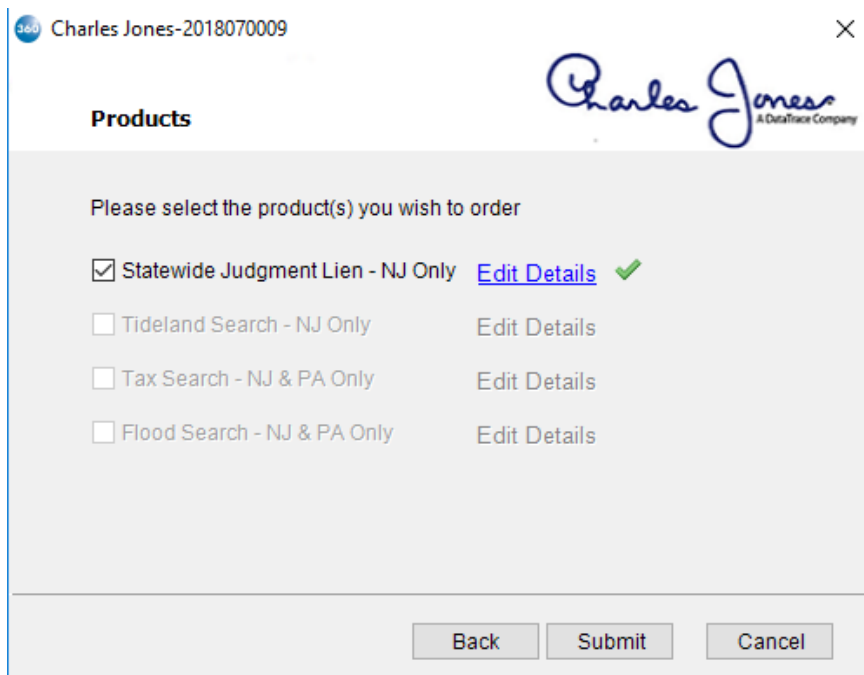
☒ Order an Updated Report
 ☐ Close this Transaction
(Updated reports can NOT be ordered from a closed transaction)

Back

Next

Cancel

Any Product(s) for which an update is available will be listed in the **Products Screen**. Select the products you wish to order and click **Submit**.



Charles Jones-2018070009

Products











Please select the product(s) you wish to order

- ☒ Statewide Judgment Lien - NJ Only [Edit Details](#) ✓
- ☐ Tideland Search - NJ Only [Edit Details](#)
- ☐ Tax Search - NJ & PA Only [Edit Details](#)
- ☐ Flood Search - NJ & PA Only [Edit Details](#)

Back Submit Cancel

Closing the Charles Jones Transaction

To mark a transaction as Closed in your SoftPro 360 queue, you may either double click the transaction or highlight the transaction and click **Next Step**. Either of these functions will open the **Update Screen**. Select the **Close this transaction** option and click **Submit**.

Queue				
<div>  Next Step    Views: Active Order     Filter: All Providers </div>				
	Transaction Number	Provider	Service	Status
	410060-30-190808-099585	Charles Jones	Property and Tax Search	Accepted
	410060-30-190808-099584	Charles Jones	Property and Tax Search	Accepted

360 Charles Jones-2018070009

Update

Provide your Charles Jones account information

Username:

Password:

Firm Number:

Update or Close

☐ Order an Updated Report

☒ Close this Transaction
(Updated reports can NOT be ordered from a closed transaction)

Back Submit Cancel

Your status for this transaction in your SoftPro 360 queue will be changed to **Completed**.

Queue				
Next Step Views: Active Order Filter: All Providers				
	Transaction Number	Provider	Service	Status
←	410060-30-190813-099759	ANTIC	ClosingProtectionLetter	In Progress
←	410060-30-190808-099586	Charles Jones	Property and Tax Search	Completed
←	410060-30-190808-099585	Charles Jones	Property and Tax Search	Accepted

NOTE: Updated reports cannot be ordered from a closed transaction.