

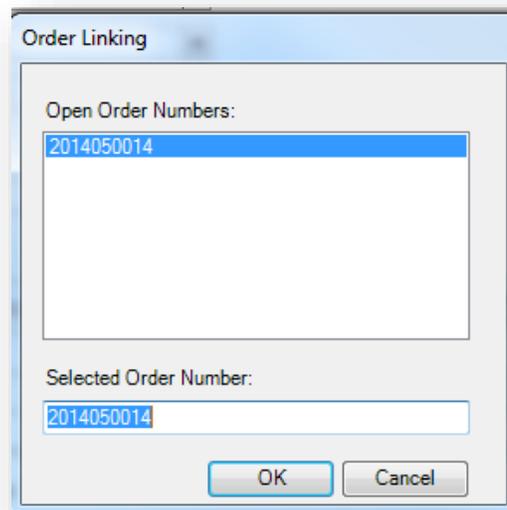
Managing DataTrace - Tax Service Transactions in SoftPro 360

How to submit a transaction to DataTrace – Tax Service

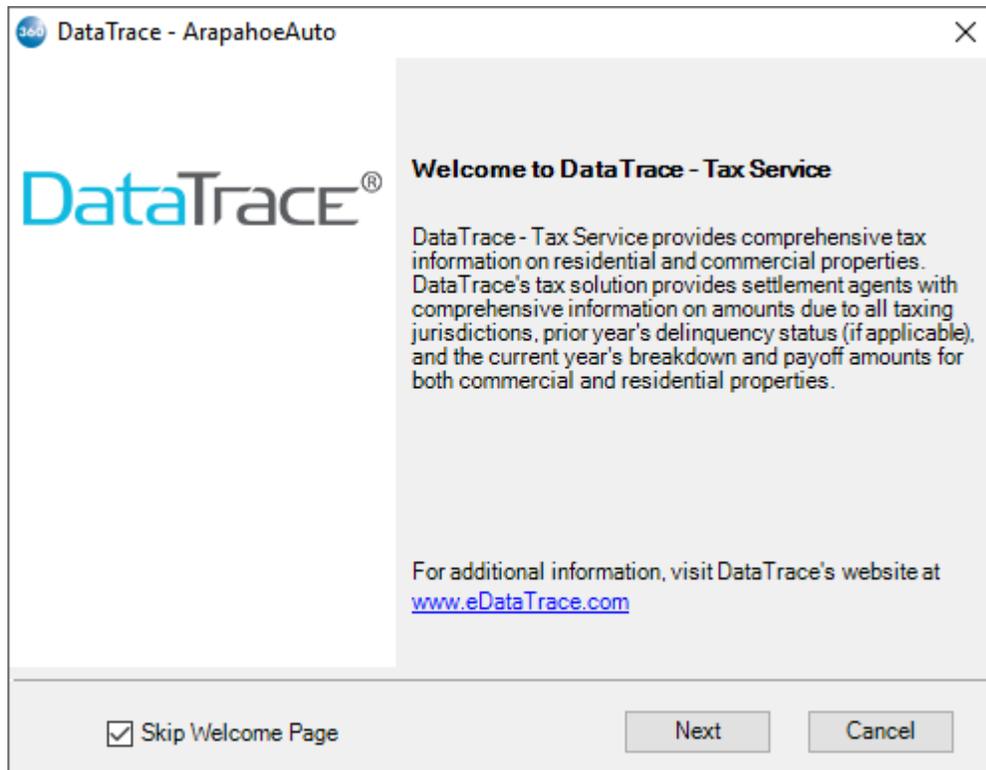
DataTrace – Tax Service can be found under the service **Tax Searches**. Double click on **DataTrace – Tax Service**, or highlight and click the **Submit** button to submit a transaction to this vendor.



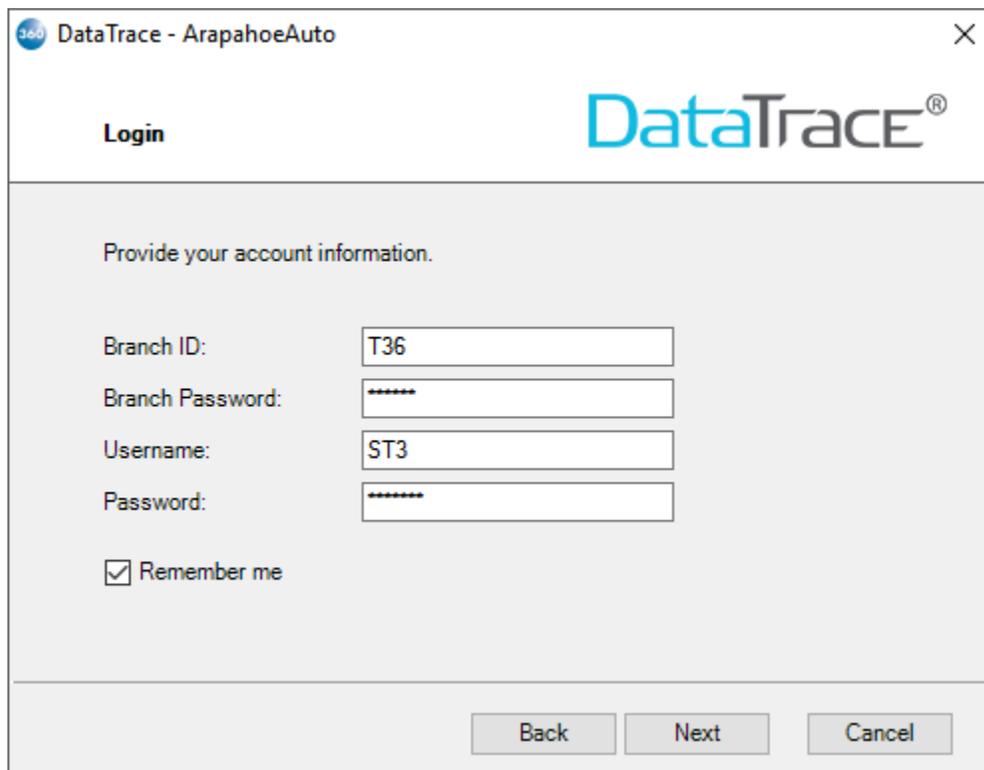
If you already have ProForm order(s) open, they will be listed in the **Order Linking** dialog. The current active order will be highlighted and entered in the **Selected Order Number** field. You can select any of these orders, or you can type your ProForm Order number that is not currently open in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



The Welcome screen provides basic information for **DataTrace**. Click **Next** to continue to the next screen.



Enter your and Branch ID, Branch Password, Username and Password. Click **Next** to continue.



The **Tax Search Information** screen will populate the fields based on the data entered into your ProForm order. Depending on the particular state and county in which the property resides, certain search options will be available. Select the appropriate search criteria and then click the "Submit" button. Should you select, "Locate Request or Manual Research", the "Submit" button will change to "Next" and you will proceed to the Locate Request or Manual Research screen. You may edit or add additional information on the screen if necessary. Click **Submit or Next** to continue to the next screen.

DataTrace - ArapahoeAuto

Tax Search Information DataTrace®

Property Address: 1512 E Mineral Pl,
Littleton, CO 80120

Tax ID # 032233338

Owner Name Seller Sam

Situs Street Number 1512

Situs Street Name Mineral

Manual Research

NOTE: Using Tax ID will increase the chances of an exact match.

Back Submit Cancel

 **Tip:** Any field that contains a red asterisk to the right of the field is a required field and must be filled-in to be able to continue submitting the order.

If the "Locate Request or the Manual Research" option is selected, the **Locate Request Service or the Manual Research** screen will be presented. The screen will be populated with data from the ProForm order. If the data present is satisfactory, then click submit.

DataTrace - ArapahoeAuto

Manual Research Request

DataTrace®

Buyer:

Seller:

Street Address:

Legal Description:

Order:

Tax ID:

Comments:

Transaction confirmation

Your **DataTrace** transaction will appear in your SoftPro 360 queue with a status of **In Progress** to indicate that your transaction has been received and is being processed.

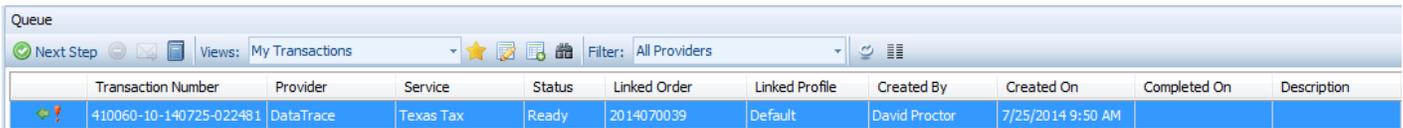
Transaction Number	Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On	Completed On	Description
410060-10-140610-019700	DataTrace	Texas Tax	Ready	1212124512	Default	David Proctor	6/10/2014 4:26 PM		
410060-10-140610-019699	DataTrace	Texas Tax	Ready	2014061090	Default	David Proctor	6/10/2014 4:25 PM		
410060-10-140610-019697	DataTrace	Texas Tax	Updated	2014061090	Default	David Proctor	6/10/2014 4:23 PM		Received Tax C...

Note:

If the property information is not located immediately through the automated search process, **DataTrace** will return either list of choices or report as to the status of the search. The transaction will turn to **Ready** and the transaction can be accessed by selecting the **Next Step** button.

Reviewing and accepting your transaction

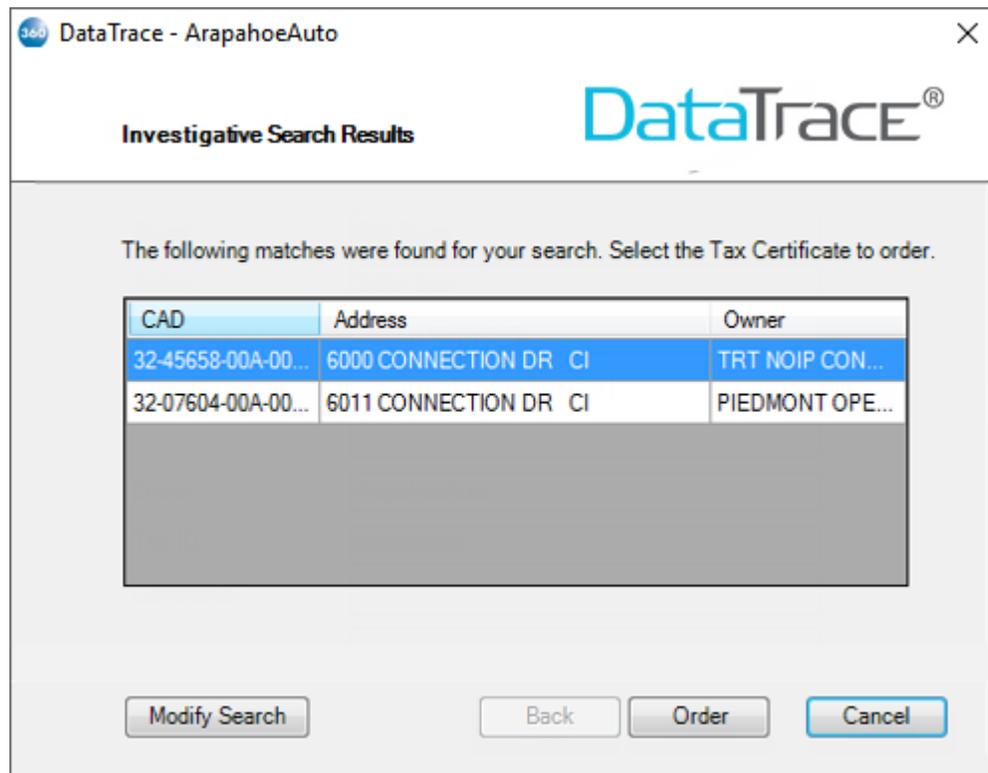
Your **DataTrace** transaction will appear in your Queue with a Status of **Ready** to indicate that your transaction has been processed and is ready for your review. Double click on the transaction or highlight and click **Next Step** from the queue.



The screenshot shows a 'Queue' window with a toolbar at the top containing 'Next Step', 'Views: My Transactions', and 'Filter: All Providers'. Below the toolbar is a table with the following data:

Transaction Number	Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On	Completed On	Description
410060-10-140725-022481	DataTrace	Texas Tax	Ready	2014070039	Default	David Proctor	7/25/2014 9:50 AM		

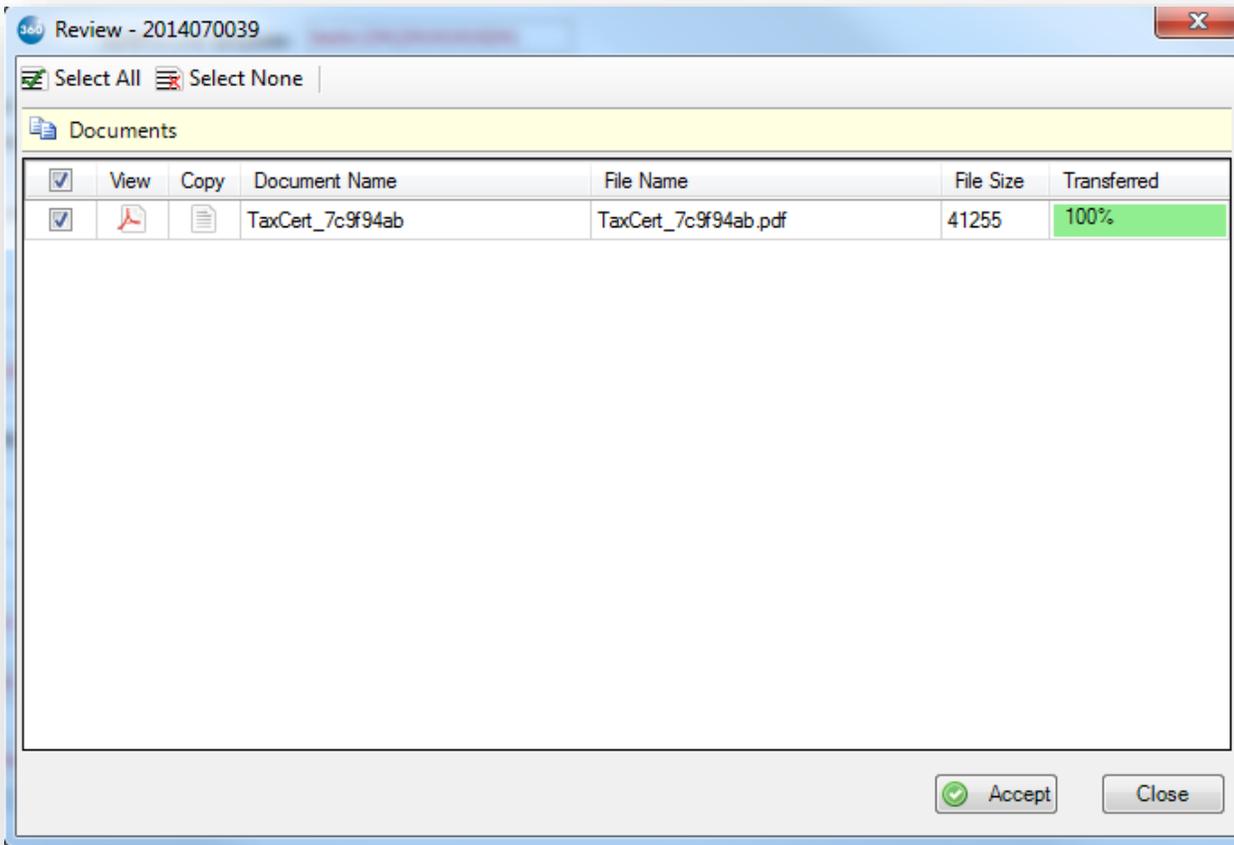
Should **DataTrace** fail to locate the particular parcel being searched, they may return results to choose from on the **Investigative Search Results** Screen. You may select the property you wish to order, then Click **Order** to order a tax certificate for that parcel.



Should the Search Results fail to return the desired results, select the **Modify Search** button and modify the search criteria and then resubmit to **DataTrace**.

Reviewing and accepting your transaction

The **Review Transaction** screen allows you to view the document(s). Click Accept to add the document(s) to your ProForm order. The document(s) will be available to you from within your ProForm order via the **SPIImage** icon located on the ProForm Menu bar. For Select users, the document(s) will be available by clicking on the **Attachments & Documents History** link located in the documents tab.



Note:

Enterprise/Standard Users:

The document(s) will be available to you from within your ProForm order via the **SPIImage** icon located on the ProForm menu bar.

Select Users:

The document(s) will be available to you from within your ProForm order via the Documents tab under the Attachments and Document History hyperlink.