

# Doma User Guide

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May 2024

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## History

Date	Version	Details
09/18/2023	v1.0	User Guide for the Global Release of “Doma – Title Search” for SoftPro 360

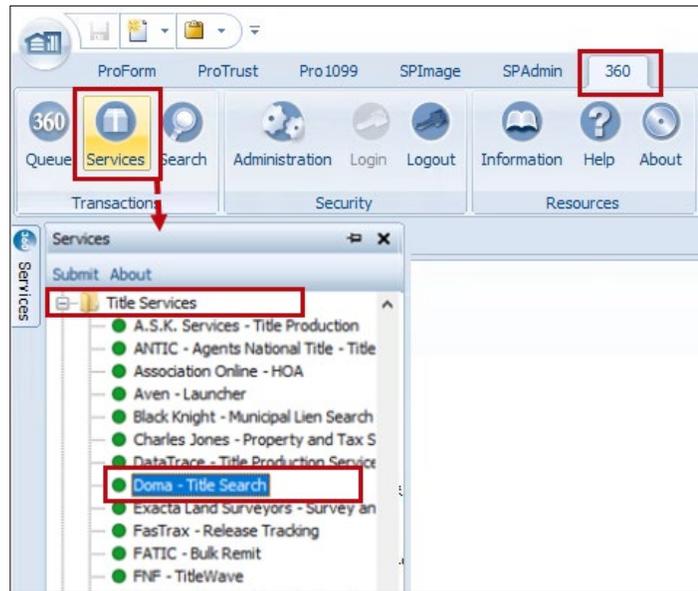
## Introduction

Doma Title Insurance is one of America’s most financially sound underwriters with a fast, simple, and transparent underwriting process. Doma is delighted to partner with agents to offer their customers powerful protection backed by a company with demonstrated financial strength, attentive service, and uncompromising standards.

## Accessing

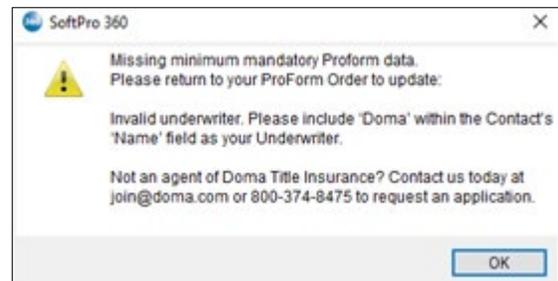
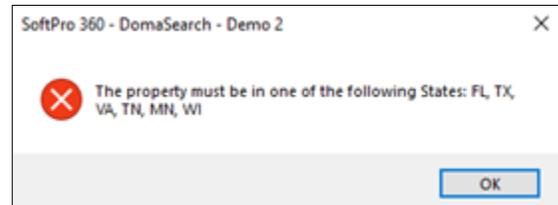
From the **360** ribbon, click the **Services** button to open the **Services** tab.

1. Click the **Title Services** folder to expand
2. Double-click the **Doma – Title Search** entry



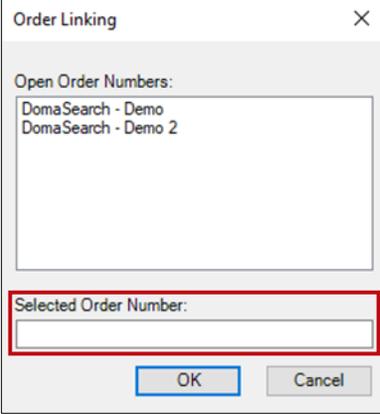
**NOTE:** When ordering your title search through Doma,

- All properties in the order must be in the same state to access this product. If not, an error message displays requesting the ProForm Order contain properties in the same state.
- The property must be in a state supported by Doma. If not, an error message displays identifying the supported states.
- If Doma is not the underwriter, a message displays informing the user how Doma can help them as an underwriting company.



## Select a ProForm Order for Title Search

Each Search request must be linked to a ProForm Order. If a ProForm order is already open and active, the active order is automatically 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:

- DomaSearch - Demo
- DomaSearch - Demo 2

Selected Order Number:

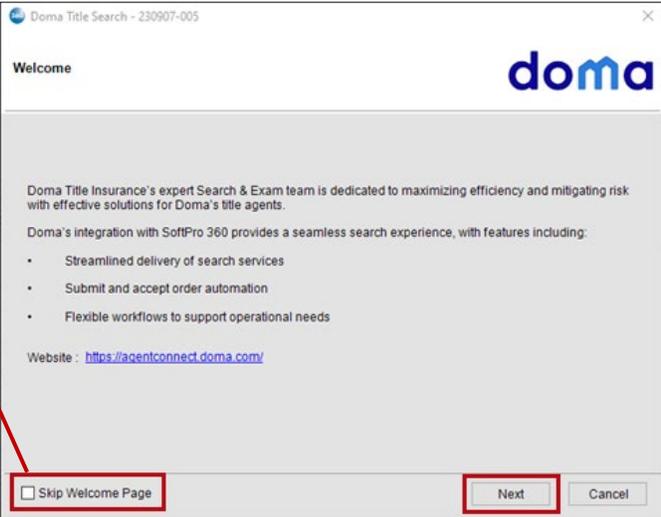
OK Cancel

## Welcome Screen

After a ProForm Order is linked, the **Welcome** screen displays.

You can check the **Skip Welcome Page** check box to skip having the **Welcome** screen display each time you log into Doma.

Click the **Next** button to continue.



Doma Title Search - 230907-005

Welcome

doma

Doma Title Insurance's expert Search & Exam team is dedicated to maximizing efficiency and mitigating risk with effective solutions for Doma's title agents.

Doma's integration with SoftPro 360 provides a seamless search experience, with features including:

- Streamlined delivery of search services
- Submit and accept order automation
- Flexible workflows to support operational needs

Website: <https://agentconnect.doma.com/>

Skip Welcome Page

Next Cancel

## Logging into Doma

The Login screen requires a valid **User Name** and **Password**.

**NOTE:** If needed, use the **Need Help Logging In** link to send an email requesting assistance with login credentials.

Check the **Remember Me** check box to automatically log in when launching the product in future sessions.

Click the **Login** button to continue to the **Agency/Branch Selection** screen.

## Agency/Branch Selection Screen

- Select the appropriate Agent Connect **Agency Name** for this order. This is a required selection.
- Select the appropriate Agent Connect **Branch** for this order. This is a required selection.
- **Enter an email address to receive status notification** each time data and/or documents are ready to be accepted. This is not a required field.

Click the **Back** button to return to the log in screen or **Next** to launch **Property and Product Selection** screen

## Property and Product Selection

The **Product and Property Selection** screen allows the user to select the **Search Type**, **Product Type**, **Transaction Type**, and **Buyer / Seller Contacts**.

The user can optionally **Add Documents**, **Notes** and a **Requested Due Date** before submitting a request.

Any item marked with an asterisk is required.

- **Property Address:** Information for the properties added within the ProForm order populate the fields.  
**NOTE:** Any needed changes to the property information must be made within the ProForm order.
- **Search Type:** Select search type to be submitted with request.
- **Product Type:** Select product type to be submitted with request
- **Buyers:** Select Buyers to be submitted with request.
- **Sellers:** Select Sellers to be submitted with request.
- **Requested Due Date:** Select the date to be submitted with request.
- **Transaction Type:** Select transaction type to be submitted with request.
- **Notes:** Add a note to send with the request; the **Add to ProForm Notes** check box is checked by default.

**Special Rules:** If the **Product Type** is,

- **Purchase**, at least one Seller is required
- **Refinance**, at least one Buyer is required
- **PIR / Info Commit**, at least one Buyer is required

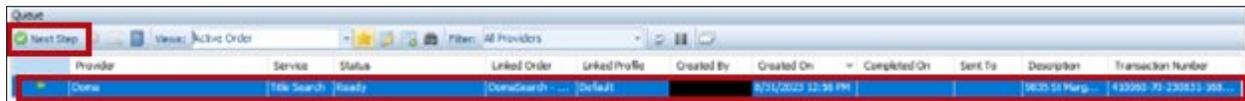
Once submitted, the 360 **Queue** is updated to show the **Status** as **In Progress**.

Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On	Completed On	Sent To	Description	Transaction Number
Doma	Title Search	In Progress	DomaSearch - ...	Default		8/31/2023 12:56 PM			9835 St Marg...	410060-70-230831-168...

## Accepting Data & Document(s)

In the 360 **Queue** the transaction **Status** is updated to show as **Ready** when data and documents have been sent from Traditional Title Search. This indicates a response has been received and is ready to be reviewed.

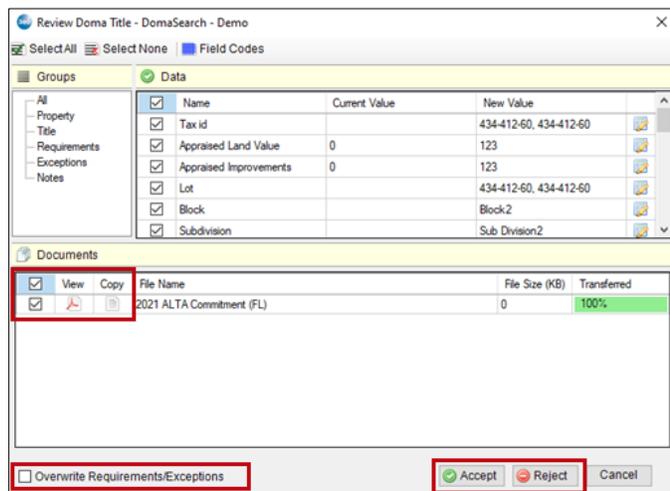
With the corresponding transaction highlighted, click the **Next step** button to review the data and documents.



## 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 Doma - Title Search on screen.
- **Copy:** Save a copy of the document to the clipboard.
- **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.
- **Accept:** Attach the document(s) to the Select order.
- **Reject:** Reject the documents once reviewed if information is incorrect or needs changes.



The accepted documents will be saved as **Attachments** to the ProForm order.

## Accepting Multiple Response Sends from Doma

When Doma sends multiple, individual responses for your order (e.g., Doma sends documents one after another), return to the **360 Queue** after accepting the first response of data and documents.

In the **360 Queue**, the transaction **Status** shows as **Ready** again. This indicates that another response has been received and is ready to be reviewed. The transaction will continue to show as **Ready** until you reviewed all responses.

## Rejecting a Transaction

Upon review of the of the documents, you have the ability to **Reject** the documents if the information is incorrect or needs any changes. Enter the **Reject Reason** (this is a required field). Notes are added to the ProForm Notes by default.

The transaction status is updated to **In Progress** so Doma can re-submit order fulfillment.

## Bringdown Request

From the **360 Queue** users can request a Bringdown for a transaction that has already been **Accepted**.

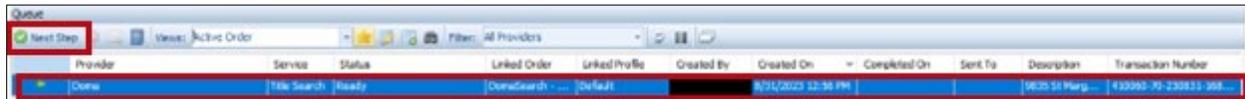
Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On	Completed On	Sent To	Description	Transaction Number
Doma	Title Search	Accepted	DomaSearch - ...	Default		8/31/2023 12:56 PM			9835 St Marg...	410060-70-230831-168...

1. Highlight the corresponding transaction.
2. Click the **Next Step** button to open the **Bringdown Request** screen.
  - Enter new / update **Settlement Date** (required).
  - Add **Notes** and additional documents if needed when submitting a Bringdown Request.
3. Click the,
  - **Submit** button; the transaction **Status** updates to **In Progress** in the **360 Queue**
  - **Cancel** button and you are returned to the **360 Queue** without requesting the bringdown

## Accepting Bringdown Data & Document(s)

In the **360 Queue** the transaction **Status** is updated to show as **Ready** when Bringdown data and documents have been sent from Doma. This indicates a response has been received and is ready to be reviewed. Doma will send the complete search data set and attached documents as part of the Bringdown response.

With the corresponding transaction highlighted, click the **Next step** button to review the data and documents.

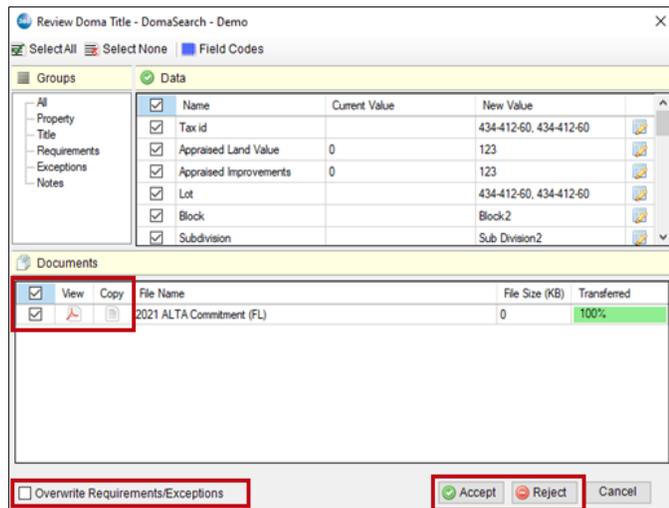


## Review Screen for Bringdown Responses

The **Review** screen allows the user to view, copy, and accept documents from the Bringdown update into the Select order.

From the **Review** screen, you may view the Bringdown data changes by comparing the **Current Value** to **New Value**.

Use the check boxes to make your selection of data and documents, accepting all of the data and documents or only a select few. The accepted documents are saved as **Attachments** to the ProForm order.



For Bringdown responses limited to updates to the Requirements/Exceptions, select the specific **Requirements** and **Exceptions** fields in the **Review** screen and check the **Overwrite Requirements/Exceptions** check box to override and replace the existing data in the transaction.

- **View:** View documents sent from Doma - Title Search on screen.
- **Copy:** Save a copy of the document to the clipboard.
- **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.
- **Accept:** Attach the document(s) to the Select order.
- **Reject:** Reject the documents once reviewed if information is incorrect or needs changes.

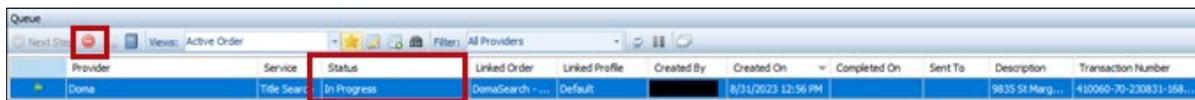
## Accepting Multiple Response Sends from Doma

When Doma sends multiple, individual responses for your order (e.g., Doma sends documents one after another), return to the **360 Queue** after accepting the first response of data and documents.

In the **360 Queue**, the transaction **Status** shows as **Ready** again. This indicates that another response has been received and is ready to be reviewed. The transaction will continue to show as **Ready** until you reviewed all responses.

## 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.



The screenshot shows a table with columns: Provider, Service, Status, Linked Order, Linked Profile, Created By, Created On, Completed On, Sent To, Description, and Transaction Number. A single row is visible with the following data: Provider: Doma, Service: Title Search, Status: In Progress, Linked Order: DomaSearch - ..., Linked Profile: Default, Created By: [redacted], Created On: 8/31/2023 12:36 PM, Completed On: [empty], Sent To: [empty], Description: 9825 St Marg..., Transaction Number: 410060-70-230831-168...

2. Highlight the corresponding transaction.
3. Click the **Cancel**  icon on the 360 **Queue** toolbar.
4. From the **Cancel Request** screen, clicking the
  - **Yes** button, the transaction status is updated to **Canceled** in the 360 **Queue**.
  - **No** button returns you to the **360 Queue** without cancelling the request.



The dialog box is titled "Cancel Request" and features the Doma logo in the top right corner. The main text asks, "Are you sure you want to cancel this request?". At the bottom right, there are two buttons: "Yes" and "No", both of which are highlighted with a red border.