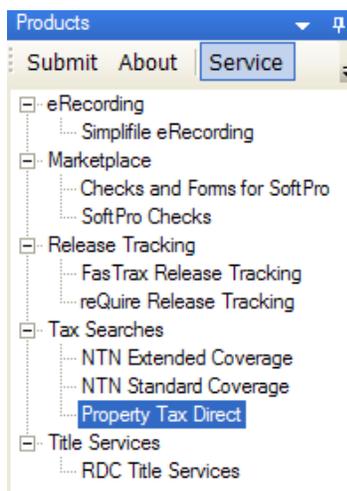


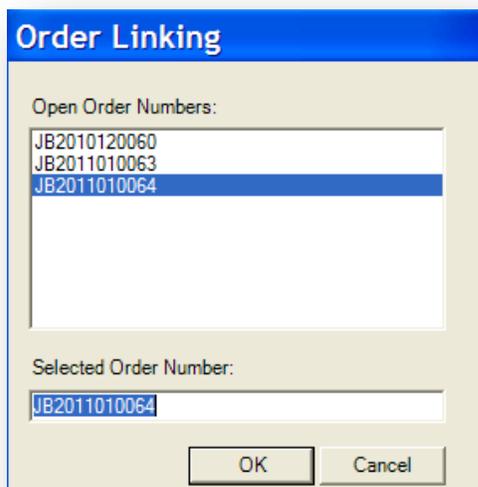
Managing Property Tax Direct transactions in SoftPro 360

How to submit a transaction to Property Tax Direct

Property Tax Direct can be found under the service **Tax Searches**. Double click **Property Tax Direct**, or highlight and click on the **Submit** button to submit a transaction to this vendor. Please replace screenshot with one where PTD is highlighted.



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 information that discloses fees and basic information for **Property Tax Direct**. Click **Next** to continue to the next screen.

Property Tax Direct

LPS
PROPERTY TAX SOLUTIONS
ALLOYER PROCESSING SERVICES COMPANY

Welcome to Property Tax Direct (PTD)
Fast and accurate property tax data on demand.

PTD provides comprehensive property tax data which includes:

- * Tax Agency Identification.
- * Parcel Number(s)
- * Tax Bill Data (both current and prior year taxes)
- * Collects at Closing Escrow Calculation

By submitting a property address, your order will be returned either instantaneously or within 48 hours if manual research is required (return time based on national averages and may vary in certain geographic areas).

Price per order:

All states except MA, NJ, NY, PA and TX.....	\$15.00
MA, NJ, NY, PA and TX	\$25.00

For questions or order status please contact us at
PTD-CustomerService@lpsvcs.com

Back Next Cancel

The **Property Information** screen will show the property address and the current owner in the ProForm order, you can manually enter or overwrite this information. Click **Next** to continue to the next screen.

Property Tax Direct- JB2011010064

Property Tax Direct
Enter property details

LPS
PROPERTY TAX SOLUTIONS
ALLOYER PROCESSING SERVICES COMPANY

Property Information

Address 1460 Waterside Drive

Address 2

City, State, Zip Dallas TX 75218

County Dallas

Current Owner Sam Seller

Back Next Cancel



Tip: Any field that contains a red triangle in the top right corner as shown here is a required field and must be filled-in to be able to continue submitting the order.

The first time a transaction is submitted to **Property Tax Direct**, you are required to fill in the **Billing Information** fields. You have the option to use Credit Card Information or an Account Number, if you have an existing account with **Property Tax Direct**. Upon submitting additional orders, if you have entered Credit Card information, you will only be required to fill in the CVV number for security reasons. Click **Submit** to continue to the next screen.

Property Tax Direct- JB2011010064

Property Tax Direct
Payment information

LPS
PROPERTY TAX SOLUTIONS
A LENDER PROCESSING SERVICES COMPANY

Billing Information

Name

Address

Address 2

City, State Zip

Phone

Email

Credit Card Information

Card Type

Card Number

Expiration Date

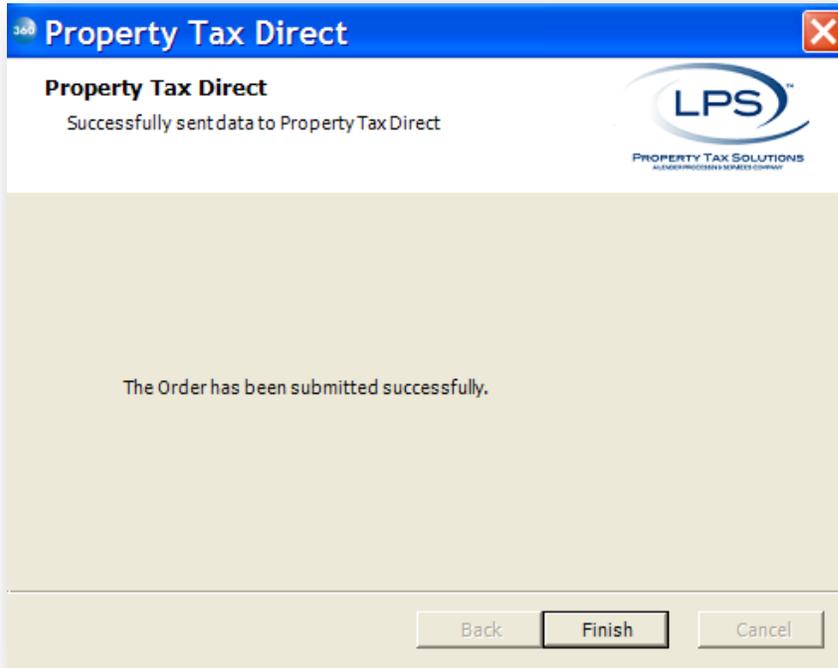
CVV Number

Or

Account Number

Back Submit Cancel

Once the transaction has been submitted, you will receive a confirmation message that your order has been submitted successfully. Click **Finish** to close the window.



the transaction will now appear in your SoftPro 360 queue as seen below with a Status of **In Progress**.

	360364-20-110106-001691	LPS Property Tax...	Property Tax Direct	In Progress
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Reviewing and accepting your transaction

Once your transaction has been processed by **Property Tax Direct**, the status will change to **Ready**. When the status is ready, you can double click this transaction or highlight and click **Review** from the queue.

360 Queue

Review Deliver [refresh] [minus] [plus] Views: All Transactions [star] [document] [calendar] [gift] Filter: All Vendors

	Transaction Number	Vendor	Product	Status	Linked Order	Created By
	360364-20-110110-001705	LPS Property Tax...	Property Tax Direct	Ready	JB2011010064	Jacky Bell

The information returned from **Property Tax Direct** will load on the transaction review screen. To view and accept the information received, select **Property 1** on the left side of the window. The **Replacement Value** is the information that has been received from **Property Tax Direct**. You can choose the information that you want to accept into the ProForm Order by checking and un-checking the **Selected** checkboxes. The selected **Replacement Value** will overwrite any information that appears as a **Current Value**. The current value is the current information in the applicable field for that ProForm Order.

Selected	Field	Current Value	Replacement Value
<input checked="" type="checkbox"/>	Address 1	1460 Waterside Dr	1460 Waterside Dr
<input checked="" type="checkbox"/>	City	Dallas	Dallas
<input checked="" type="checkbox"/>	State	TX	TX
<input checked="" type="checkbox"/>	Zip	75218	75218
<input checked="" type="checkbox"/>	County	Dallas	Dallas
<input checked="" type="checkbox"/>	Parcel ID	0052520C000010000	0052520C000010000

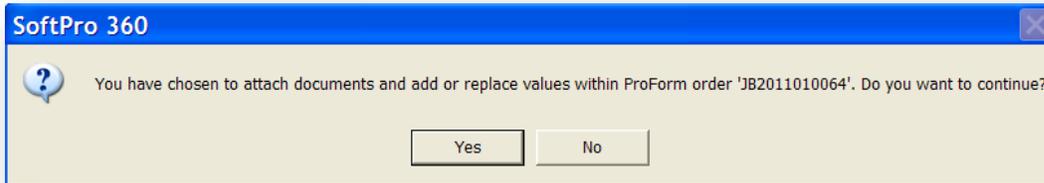
The editable flow text field will allow you to make changes to the **Replacement Value** prior to accepting the information into your ProForm order.

1460 Waterside Dr

To view Document(s) returned by the Vendor, click on the **Documents** option in the left window below **Property 1** and then choose the **View** button underneath the **View Documents** column.

Selected	Field	Current Value	Replacement Value	View Document
<input checked="" type="checkbox"/>	TaxProfile_3396750	Property Tax Profile_3396750	Property Tax Profile_3396750	View

Click **Accept** and the following message will appear. Selecting **No** will go back to the review screen to allow you to make additional edits, selecting **Yes** will apply all selected values to the ProForm order.



If you select **Yes**, you will receive the following confirmation. Click **OK** to continue.



The Status of your transaction in the SoftPro 360 Queue will then change to **Completed**.

The screenshot shows the "360 Queue" window. It has a toolbar with "Review" (checked), "Deliver", and other icons. The "Views" dropdown is set to "All Transactions" and the "Filter" dropdown is set to "All Vendors". Below the toolbar is a table with the following data:

	Transaction Number	Vendor	Product	Status	Linked Order	Created By
←	360364-20-110110-001705	LPS Property Tax...	Property Tax Direct	Completed	JB2011010064	Jacky Bell

The information accepted for your ProForm order will overwrite any existing data, and your document(s) will be available to you from within your ProForm order via the SPImage icon  located on the ProForm Menu bar. Or for Select users the documents will be available by clicking on the **Attachments & Documents History** link located in the documents tab.