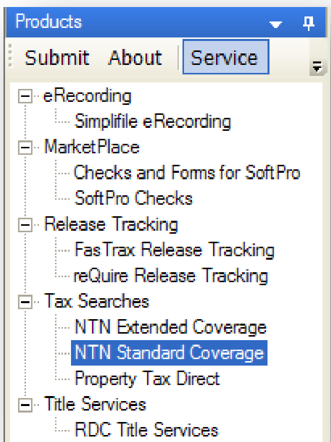
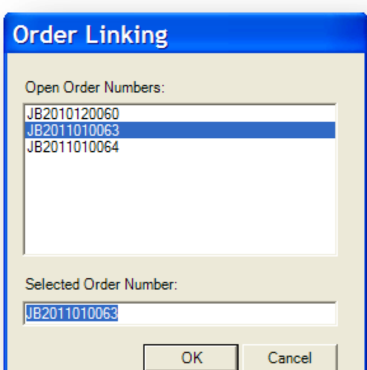
Managing National TaxNet Standard Coverage Transactions in SoftPro 360

How to submit a transaction to National TaxNet

National TaxNet Standard Coverage can be found under the service **Tax Searches**. Double click on **NTN Standard Coverage**, or highlight and click the **Submit** button to submit a transaction to this vendor.

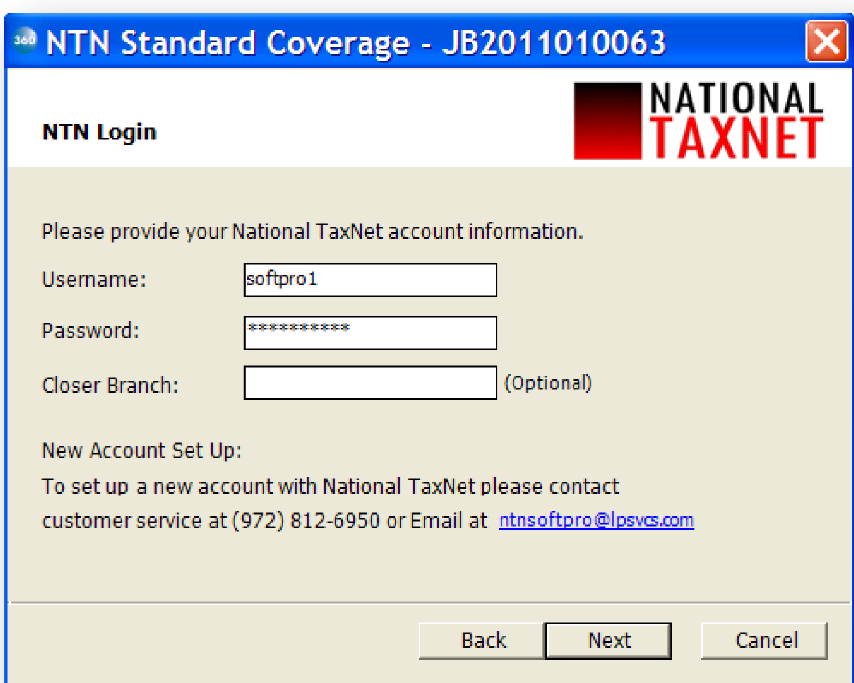


If you already have ProForm order(s) open, they will be listed in the **Order Linking** dialog. The current active order will be highlighted and entered in the **Selected Order Number** field. You can select any of these orders, or you can type your ProForm Order number that is not currently open in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

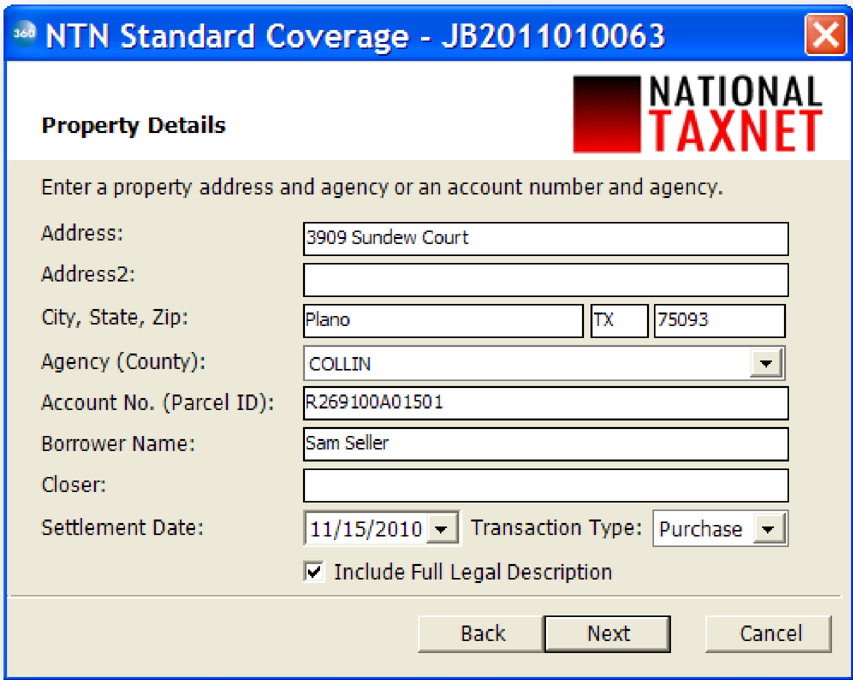


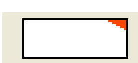
The Welcome screen provides basic information for **National TaxNet**. Click **Next** to continue to the next screen.

Enter your Username and Password and Closer Branch if applicable. Click **Next** to continue.



The **Property Details** screen will populate the fields based on the data entered into your ProForm order. **National TaxNet** requires that a valid Account Number (Parcel ID) and Agency (County) or a valid Property Address and Agency (County) be provided to submit the transaction. You may edit or add additional information on the screen if necessary. Click **Next** to continue to the next screen.



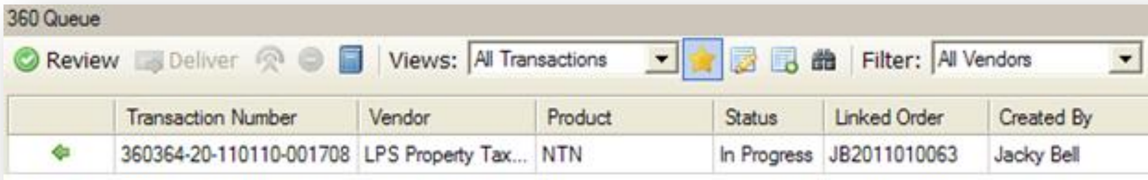

Tip: Any field that contains a red triangle in the top right corner as shown here is a required field and must be filled-in to be able to continue submitting the order.

National TaxNet requires either the **Closer** and **Settlement Agent** or the **Examiner** and **Title Company** be entered in order to submit a transaction. Click **Submit** to continue.

The **Confirmation** dialog will appear once the transaction has been successfully submitted to **National TaxNet**. Click **Finish**.

Transaction confirmation

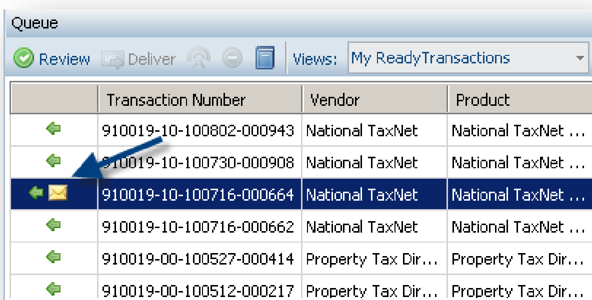
Your **National TaxNet** transaction will appear in your SoftPro 360 queue with a status of **In Progress** to indicate that your transaction has been received and is being processed.



Note:

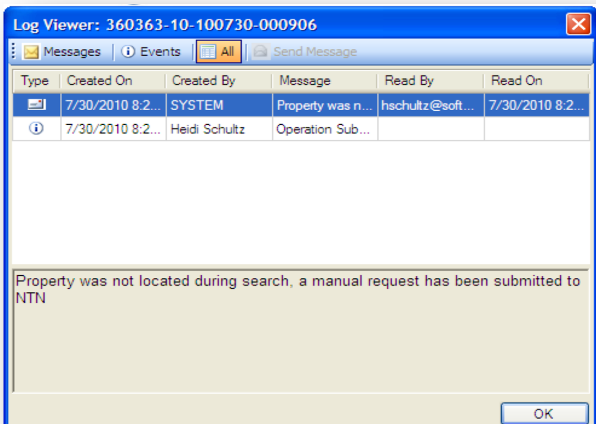
If the property information is not located immediately through the automated search process, **National TaxNet** will conduct a manual search to locate the property. The transaction status remains **In Progress** and the transaction will be processed as usual once the property is located.

A message icon will appear in your SoftPro 360 queue to notify you of this occurrence.



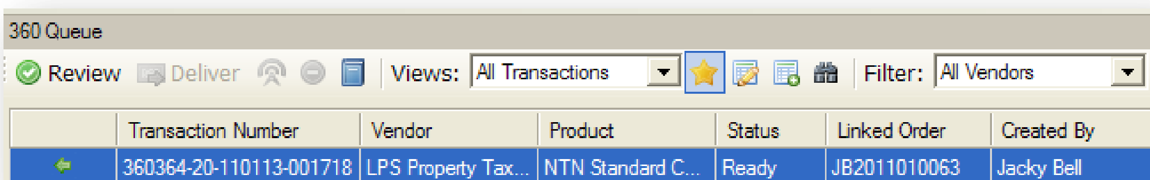
Highlight the transaction in your queue and click the **Log** button to view this message.

The **Log Viewer** will show you messages and the history for this transaction. Click **OK** to close the Log Viewer.

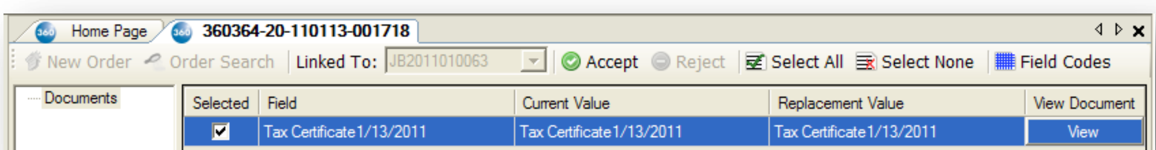


Reviewing and accepting your transaction

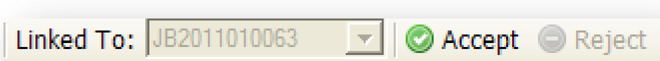
Your **National TaxNet** transaction will appear in your Queue with a Status of **Ready** to indicate that your transaction has been processed and is ready for your review. Double click on the transaction or highlight and click **Review** from the queue.



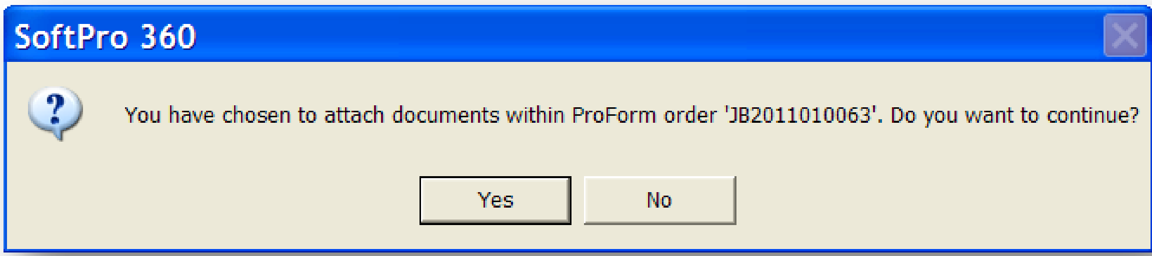
To view the Document(s) returned by the Vendor, click on the **View** button under the View Document column.



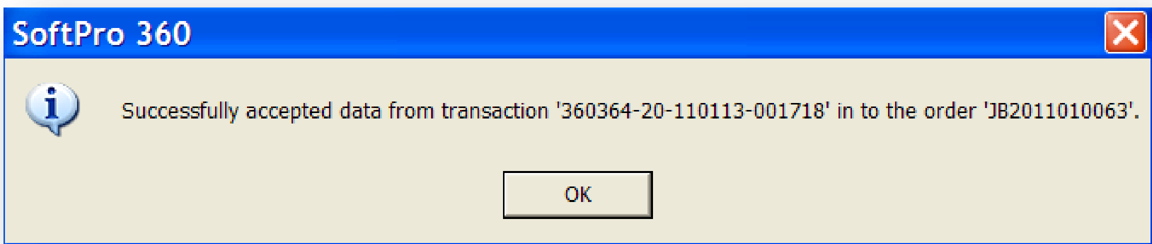
Once you have reviewed the document, click **Accept**.



Once you choose to **Accept** the document, the following message will appear. Selecting **Yes** will add the document to your ProForm order, selecting **No** will take you back to the review screen.



If you select **Yes**, you will receive the following confirmation. Click **Ok**.



The status of your transaction in the queue will update to **Accepted** and the **Description** column will show Certificate Received and the received date. This will allow you to order an updated Tax Certificate for this transaction.

Note:

Enterprise/Standard Users:

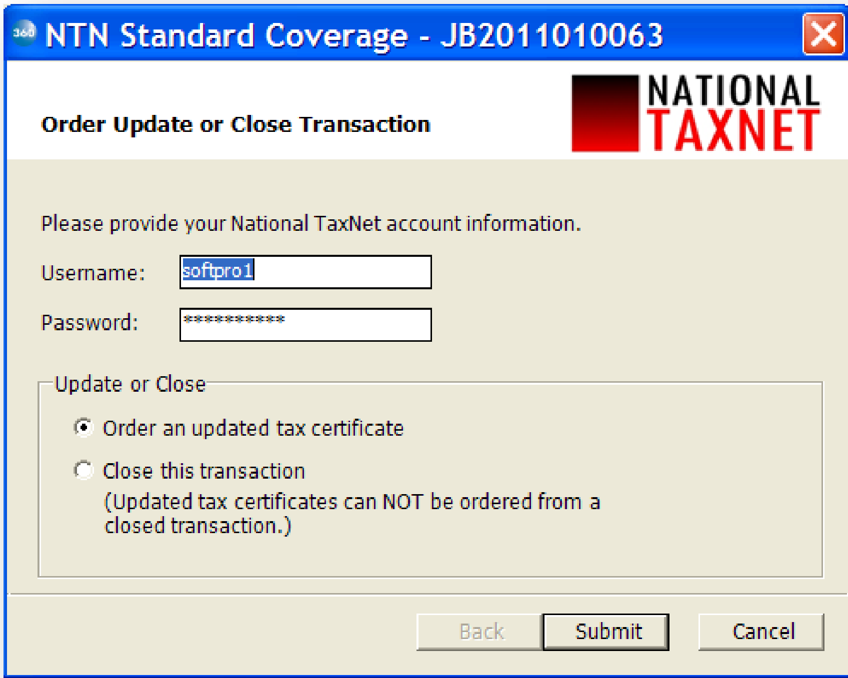
The document(s) will be available to you from within your ProForm order via the **SPImage** icon located on the ProForm menu bar.

Select Users:

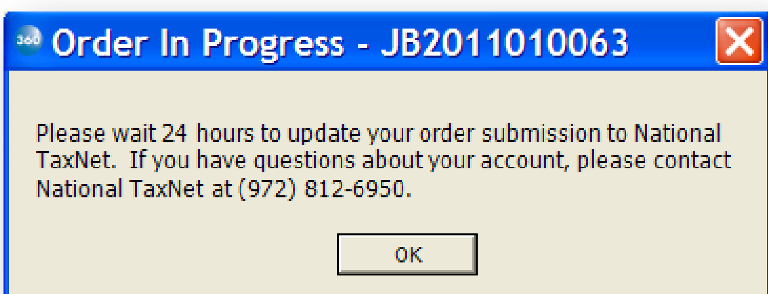
The document(s) will be available to you from within your ProForm order via the Documents tab under the Attachments and Document History hyperlink.

Requesting an updated tax certificate

To request an updated Tax Certificate, highlight the transaction in your SoftPro 360 queue and click the **Update** icon. Select 'Order an updated tax Certificate' and click the **Submit** button.

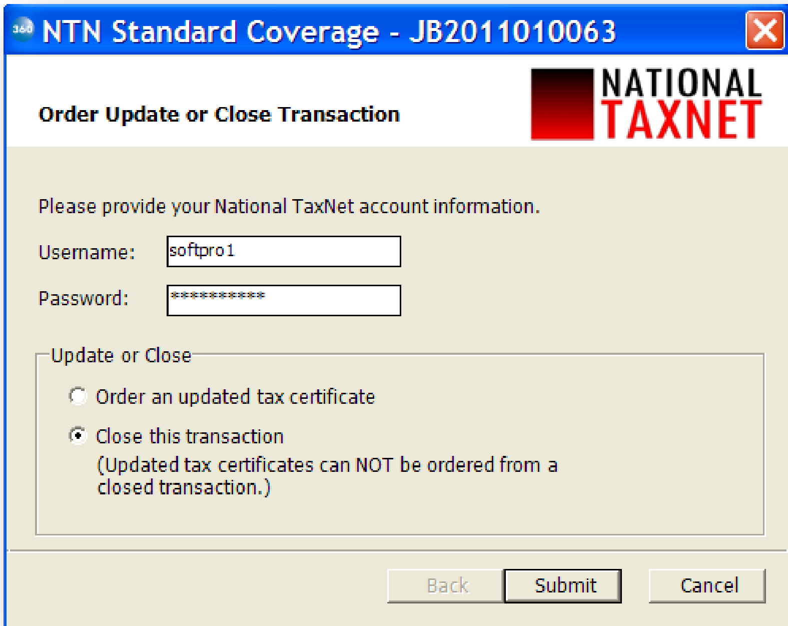


If you request an update for a transaction when you have not yet received an initial tax certificate, you will receive the following message. You will need to contact **National TaxNet** directly to process an update during this time period.

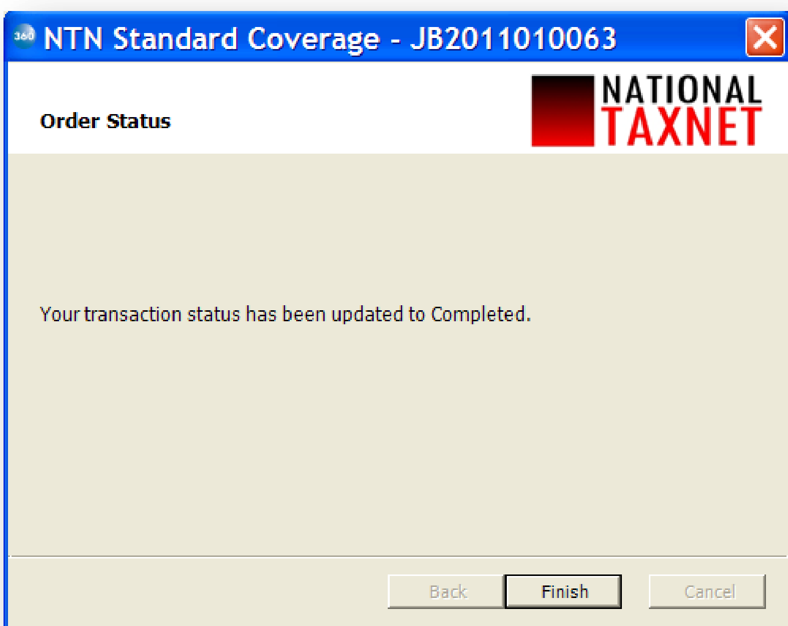


Closing the National TaxNet transaction

To mark a transaction as **Completed** in your SoftPro 360 queue, highlight the transaction and click on the **Update** button. Select the **Close this transaction** option and click **Submit**.



An Order Status dialog confirming the status change to **Completed** will appear. Your status for this transaction in your queue will be changed to **Completed**.



Additional information

Note: The ProForm "Closer" field will show in the **Sent To** column. This provides you with the ability to sort your SoftPro 360 Queue by the **Sent To** field to see transactions that were submitted on behalf of a specific closer. You may also create a custom view for the SoftPro 360 queue to show the **National TaxNet** transactions for a closer as well. To add this **Sent To** field to your 360 Queue, click on the **Queue Column** icon and select **Sent To**.