

# Old Republic Title Search User Guide

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## History

| Date              | Version | Details  |
|-------------------|---------|--|
| <b>02/28/2024</b> | V1.0    | Updated to add the Multiple Properties Enhancement       |
| <b>10/3/2024</b>  | V1.1    | Added enhancements (Hyperlink/Restrictive Covenant Data) |

## Introduction

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The Old Republic Title Search integration with SoftPro 360 provides users the ability to seamlessly place orders for Old Republic Title Search’s products & services and receive the results of those orders within SoftPro 360. Users will be able to submit an order, track the status of their requests and receive reports from Old Republic Title Search all from within SoftPro 360.

## Features

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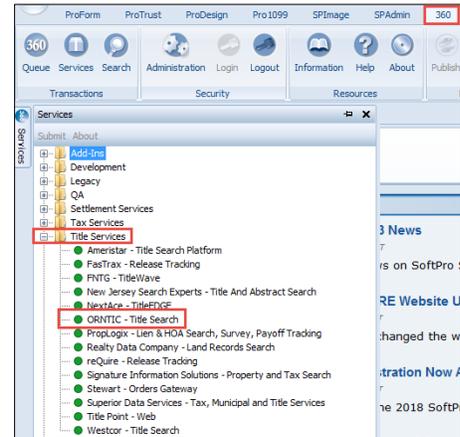
Old Republic Title Search users can:

- Request Old Republic Title Search products.
- Track the status of their requests.
- Preview documents returned from Old Republic Title Search.
- Accept and attach documents to an order.

## Access the Vendor Services

From the **360** toolbar:

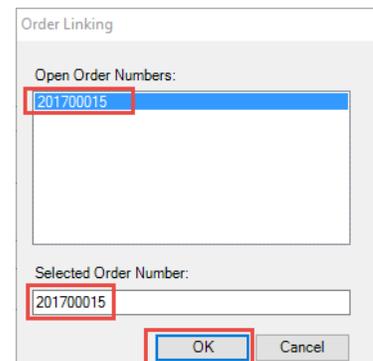
1. Select the **Services** button
2. Double-click the Title Services folder to expand
3. Double-click the **Old Republic Title Search** entry to open the **Order Linking** screen



## Select a ProForm Order for Your Search

You must link each transaction to a ProForm Order. Orders currently open are listed in the **Open Order Numbers** box with the current active order shown in the **Selected Order Number** field.

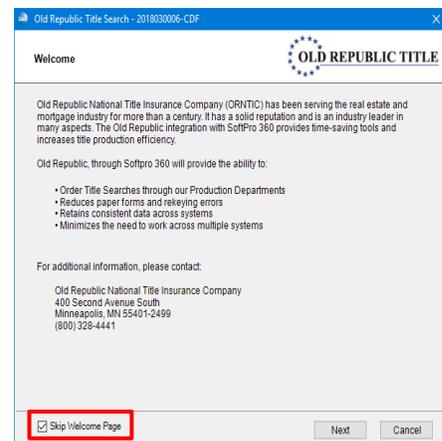
1. Select an order from the list to populate the **Selected Order Number** field or manually enter an order number.
2. Click **OK** to navigate to the **Welcome** screen.



## Welcome Screen

The **Welcome** screen provides a summary of the product & Old Republic Title Search's contact information. Click **Next** to navigate to the **Title Services** screen.

- You may click the **Skip Welcome Screen** checkbox to bypass this screen in future sessions.



## Title Services Screen

The **Title Services** screen allows the user to select or add **Property** (if multiple properties exist on the order) and then select a Product based on the **state** and **county** information entered for an order.

- **Add Product:** Select to add products to be submitted with request.
- **Update:** Select to update a request that has been sent to Old Republic including additional notes and documents.
  - Previously sent notes are displayed but not resent with the update.
- **Cancel:** Select to cancel a request. Canceling a request can only be performed **prior to** the time Old Republic has returned the request.
  - A request cannot be canceled when the transaction status is **Ready** or **Accepted**
  - A reason for the cancellation is required.
- **Summary:** Select to view information concerning the highlighted request.

## Requestor Contact Information

The **Requestor Contact Information** screen allows the user to provide the contact information for the person submitting the request.

- **Title Company, Settlement Agent, Escrow Company:** Information added for the selected contact within the ProForm order populates into the fields; this can be edited on screen.
- **Agent Name, Email Address, Phone Number:** Information added for the main contact person for the selected contact within the ProForm order populates into the fields; this can be edited on screen.
  - This information is required to submit a request and an asterisk shows the required information is missing. The user will not be able to submit the request until required information is completed.
- Click the **Next** button.

## Order Information

The **Order Information** screen provides the user with information pertaining to the property(s) added to the ProForm order.

- **Property Address:** If only one property is added to the order in ProForm, the property address defaults to the address fields. The user can submit a transaction for up to (5) properties at a time. One transaction is created for all properties submitted.
  - The property address cannot be edited on this screen. Any modifications to this information must be completed in the ProForm order.
  - The user can select a county if a county was not entered in the ProForm order or the county should be different than what was entered in the order.
- **Loans:** A maximum of (2) loans can be associated with a property.
- Click the **Next** button.

## Product and Provider Selection

The **Product and Provider Selection** screen provides the user with information pertaining to the property(s) added to the ProForm order.

- **Search Office:** The list of offices provided is based on a company's trading partner relationship with Old Republic and where the subject property is located.
  - Old Republic will provide the search office(s) available for processing an order and the product(s) available thru the selected office. If only one search office is available, the drop-down defaults to that office automatically.
  - Old Republic provides search office address, contact, email and telephone numbers for reference and convenience.
- Old Republic **Search Office**, **Product** and **Due Date** are all required as indicated by the red asterisk. The request cannot be submitted until the required information is completed.
- Click the **Next** button to continue.

## Add Note(s)

The **Add Note(s)** screen provides the user with information pertaining to the property(s) added to the ProForm order.

All requests submitted through the Old Republic Title Search integration are sent through Closing Market (Ramquest). There are some data items that are not part of Ramquest so the Old Republic Title Search integration automatically creates notes to send this information to Old Republic.

- **New:** The user can add a new note to submit with the request.
- **Remove:** The user can remove a note that they added to this screen. Notes automatically generated cannot be removed.
- **Add to ProForm Notes:** If this box is checked for the new note(s) added, the note(s) will be added to the notes section of the order within Select.
- **Note Text:** Shows the complete text of the highlighted note being sent.
- After reviewing, click the **Next** button.

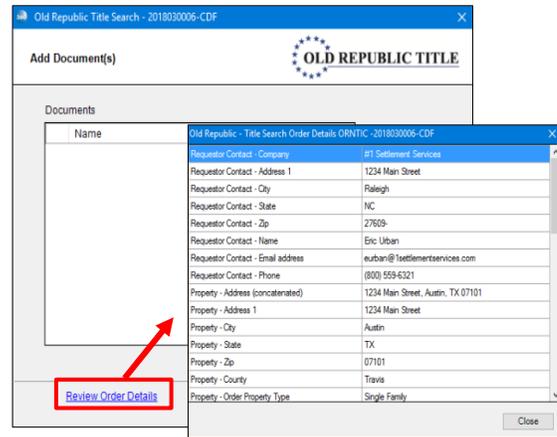
## Adding Document(s)

The **Add Document(s)** screen allows the user to attach documents before submitting to Old Republic Title Search.

- **Browse:** Browse out to your local drive to select documents to submit.
- **Attachments:** Attach documents from the ProForm order.
- **ReadyDocs:** This button is not applicable to Old Republic Title Search transactions at this time.
- **Rename:** Rename the documents before submitting.
- **Delete:** Delete documents from the list of documents before submitting.
- **Review Order Details:** Click this link to view information from your order that will be included in your request to Old Republic Title Search. The information displayed is read-only.
- After selecting documents, click **Submit**

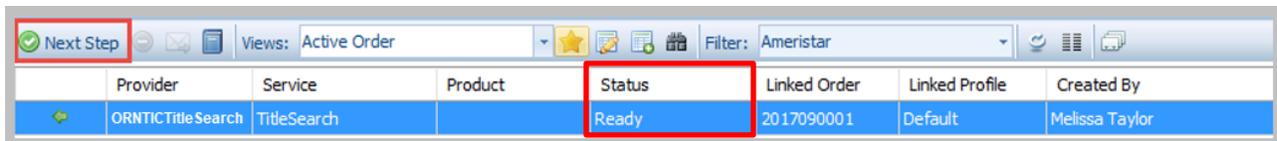
The **Review Order Details** screen is read-only and displays the additional order information that will be sent to Old Republic Title Search.

Click the **Close** button when done reviewing.



## Accepting Data & Document(s)

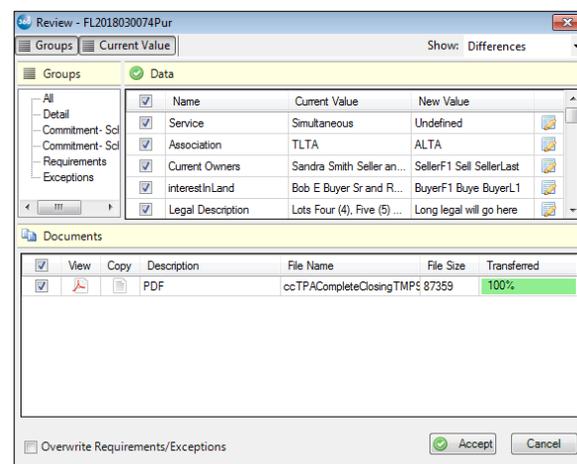
In the **360 Queue** the transaction status shows as **Ready** when data and documents have been sent from Old Republic Title Search. Click the **Next Step** button to review the data and documents.



## Review Screen

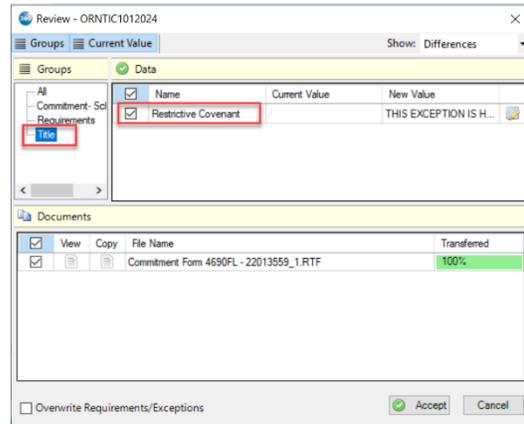
The **Review** screen allows the user to view, copy, and accept documents from Old Republic Title Search into the Select order.

- **View:** View documents sent from Old Republic Title Search.
- **Copy:** Save a copy of the document to the clipboard.
- **Accept:** Attach the document(s) to the Select order.
- **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.



The accepted documents are saved in **Attachments** in the ProForm order.

**Note:** When a Restrictive Covenant data is received and accepted for Texas properties, it will appear under the Title group on Review screen and saved in the proform order under Title- Commitment Schedule A, within the custom field.



When a hyperlink URL is received and accepted in the requirements/exception, it will appear under Title- Commitment B1,B2 and users will have the ability to click on these hyperlinks to access the linked content directly.

