

Old Republic Title Search User Guide

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History

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

Introduction

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

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.

- 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**.

Order Linking		
Open Order Nu	umbers:	
201700015		
Selected Order	r Number:	
	ОК	Cancel

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.

Old Republic Title Search	ch - 2018030006-CD	F	×
Requestor Contact Ir	formation	‡ OLĮ	REPUBLIC TITLE
() Title	Company	○ Settlement Agent	O Escrow Company
Requestor:	The Reliable Title	Company	
Address 1:	1234 Main Street		
Address 2:			- Foreign
City:	Austin	State: TX ~	Zip: 12345
Agent Name:			*
Email Address:			*
Phone Number:	<u></u> *	Fax Number:	<u>. </u>
Prior File Nbr:			
			Next: Cancel

- 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.

Old Republic Title Se	earch - 2018030006-CDF		×
Title Services		* OL <u>D RE</u>	PUBLIC TITLE
Action Product	Property Address	Status	Created On
	To add a product, dick the "Add Product" b	utton below.	

- 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.

o 💿 Orc	ld Repub der Info	olic Title !	Search -		****	D REPUBL	> IC TITLE
Prope	rty Addre	55					
	Address	3		City	Zip	County	
	Property	No.1		Raleigh	27609	Wake	~
	Property	No.2		Raleigh	27609	Wake	~
	Property	No.3		Raleigh	27609	Wake	~
	Sele	ct any tw	vo loans for this o	rder:			
		Loan	Loan Number	Loan Amount	Lender		
		1	758888000	\$275,000.00	Bank of Am	erica	
					Back	Next	

- 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 Title Sea	rch - 2018030006-CDF X
Product and Provid	er Selection
Search Office:	-select an office- 🗸 \star
Address:	-select an office- Old Republic National Title Insurance Company, 123 Main St., Houst Old Republic National Title Insurance Company, 123 Main St., Houst
Contact:	Or Republic National The insurance company, 123 main St., House
Email:	
Phone Number:	() Fax: ()
Product:	-select product-
Due Date:	
	Back Next: Cancel

• 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.

	***	*
Notes		Show ProForm
Status	Text	Send New
Pending F	Property Type: Single Family	
Pending (Owners Full Names: Sally Seller	Remo
Pending B	Borrowers Full Names: Brandon Buyer, SoftPro	
Note Text:	e: Single Family	Add to ProForm
		~

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.
- Add Document(s)

 Documents

 Name

 Browse

 Atachment

 Documents

 Review Order Details

 Back

 Submit

 Cancel
- 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.

dd Document(s)	***** *****	REPUBLIC TITLE	
Documents			
Name	Old Republic - Title Search Order Detail	s ORNTIC -2018030006-CDF	
	Requestor Contact - Company	#1 Settlement Services	
	Requestor Contact - Address 1	1234 Main Street	
	Requestor Contact - City	Raleigh	
	Requestor Contact - State	NC	
	Requestor Contact - Zip	27609-	
	Requestor Contact - Name	Eric Urban	
	Requestor Contact - Email address	eurban@1settlementservices.com	
	Requestor Contact - Phone	(800) 559-6321	
	Property - Address (concatenated)	1234 Main Street, Austin, TX 07101	
	Property - Address 1	1234 Main Street	
	Property - City	Austin	
L	Property - State	TX	
	Property - Zip	07101	
	Property - County	Travis	
Review Order Detai	Property - Order Property Type	Single Family	

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.

🕑 Next Ste	ep 🛛 🖂 🗐 Vi	iews: Active Order	-	📝 🐻 🛗 Filter:	Ameristar	ج ي	
	Provider	Service	Product	Status	Linked Order	Linked Profile	Created By
\$	ORNTICTitle Search	TitleSearch		Ready	2017090001	Default	Melissa Taylor

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.

😔 Review - FL2018030074Pur 🛛 💌							
Groups 🔲 Curre	ent Value		Show: [Differences		-	
Groups	🕑 Data						
Al	Vame Name	Current Value	New Value			-	
- Detail	Service	Simultaneous	Undefined				
Commitment- Scl	Association	TLTA	ALTA		2		
Requirements	Current Owners	Sandra Smith Seller an	SellerF1 Sel	I SellerLast			
····· Exceptions	interestInLand	Bob E Buyer Sr and R	BuyerF1 Buy	ye BuyerL1			
4 III +	Legal Description	Lots Four (4), Five (5)	Long legal w	vill go here		Ŧ	
Documents							
View Cop	by Description	File Name	File Size	Transferre	d		
	PDF	ccTPACompleteClosingTM	PS 87359	100%			
🔲 Overwrite Requi	irements/Exceptions		💿 Ac	cept	ancel		

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.

	≣ Groups ≣ Cu	rent Value	Show: Differences
	Groups	🕝 Data	
	All	Name Current Value	New Value
	- Commitment's	Restrictive Covenant	THIS EXCEPTION IS H
	Contract Con		
	View C	ppy File Name	Transferred
		Commitment Form 4690FL - 22013559_1.RTF	100%
	Overwrite Req	irements/Exceptions	Accept Cancel
Invoice	ecording information of Restrictive Covenants:		
Loan	THIS EXCEPTION IS HEREBY DELE	ED IN ITS ENTIRETY	
Title			
Title Legal Description	tandby fees, taxes and assessments for year(s):	_	
Preliminary Title Search & O			
Existing Liens	Rule P-2 applies (Amendment of Exception to Area and	Boundaries)?	
Title Insurance Premiums Commitment - Schedule A			

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.



Start Page Order ORNTIC1012024 X			
General	Commitr	nent - Schedules B1, B2	
Express Order Entry Order Information Status Order Contacts	Numbering scheme: Begin Requirements at:	Edit Requirement or Exception Details Places	- 0 X
koperty Require Jales Contract & Earnest Money Require Notary & Acknowledgment	Requirements Requirements Requirement 2	Type: Exception V Show and docu nts. Code: V Show with num RK 2 B Z Li And V V C III 9 V V S	Show on document Include on loan policy Show with numbering Include on owner's policy Search P
Affidavit Invoice	Requirements	Requirements 2, disclosing HOA contact information of Official records.	recorded February 23, 2010 as 2014-148414
Loan 👻			
Title Legal Description Preliminary Title Search & Opinion Existing Liens			v
Title Insurance Premiums Commitment - Schedule A Commitment - Schedules 81, 82		Comment:	↓
Final Title Opinion Policy - Schedule A	Notes (0)		OK Help