Pippin Title Search
User Guide

March 2025

Copyright and Licensing Information

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History

Date	Version	Details
03/18/2025		Initial Release

Introduction

Pippin Title Search integration with SoftPro 360 provides users the ability to seamlessly place orders for Pippin Title Search 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 Pippin Title Search all from within SoftPro 360.

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 **Pippin Title – Title Search (Commercial & Residential)** entry
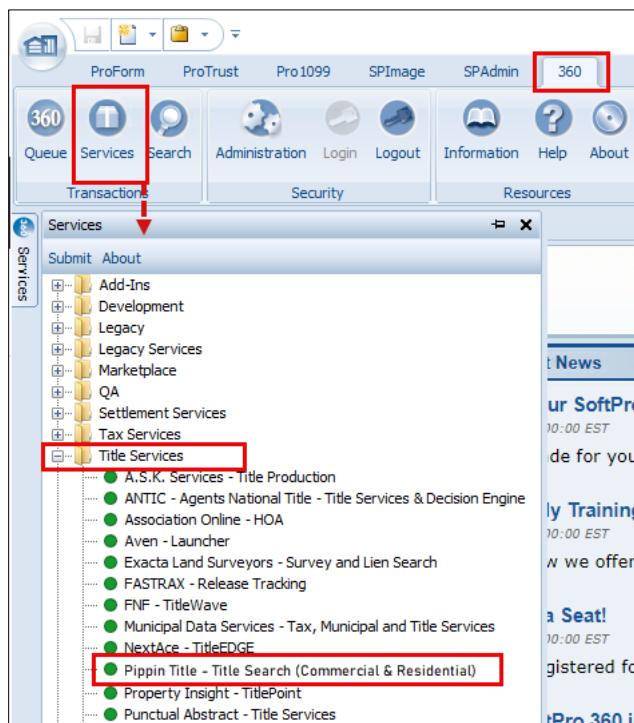
Select a ProForm Order for Title Search

Each Search request must be linked to a ProForm Order.

1. From the **Order Linking** window
   a. If no order is open, enter the corresponding order in the **Selected Order Number** field

b. If a single order is open, the order number is shown in the **Open Order Numbers** field and the **Selected Order Number**

NOTE: The **Selected Order Number** field can be overwritten with an order that is not open.

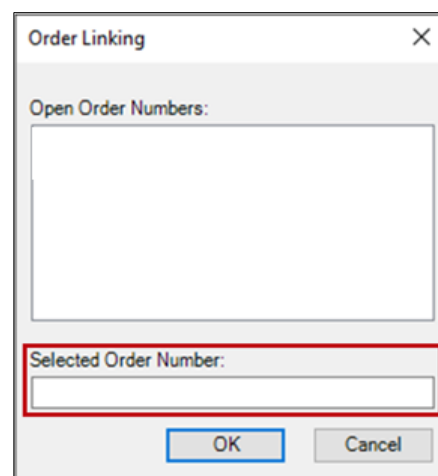c. If multiple orders are open, all order numbers appear in the **Open Order Numbers** field and the first order is displayed in the **Selected Order Number** field. Highlight an order in the **Open Order Numbers** field to select the applicable order

2. Press the **OK** button to continue

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 Pippin.

You must check the **I have read and accept the Terms & Conditions** check box to enable the Next button.

Click the **Next** button to continue.

Title Services Screen

The integration uses the SoftPro 360 user login information to log in and directly open the Pippin application. Users must have a Pippin account to utilize their service. Contact Pippin to establish and account if needed.

The user is presented with the **Title Services** window.

From here the user can,

- Submit a **New Search** request
- Submit a **Bringdown Search** request
- **Edit** an existing search request
- **Void** an existing search request
- **Order Tracker** to review that status of a search request

Click the **New Search** button to continue.

Property and Product Selection

The **Product and Property Selection** screen allows the user to review the information pulled in from the ProForm order and select the **Product Type** and provide additional information as needed.

If the ProForm order has multiple properties, you would then select the property to be searched from the **Property** drop-down list.
If a search is needed for the additional properties in the ProForm order, you would submit the first request and then repeat the process for each additional property to be searched.

As noted by the red asterisk, the **Product** selection is required to enable the **Next** button.

If data is entered in the ProForm order, fields populated from the order are:

- All **Property Information** fields
- **Settlement Date**
- **Sales Price**
- **Order Contact Information** fields

The pre-populated fields may be overwritten but the data does not write back to the ProForm order.

The user can optionally enter **Desired ETA** (populates with the current date), **Purpose**, **Sales Price**, **Years to Search.** and update any pre-populated fields.

Once the **Product** is selected, the **Next** button is enabled. Click **Next** to continue.

Adding Documents/Note

The **Documents/Note** screen allows the user to attach documents before submitting the request and/or provide additional information as needed in the **Add Note** field. The default is to **Add Note to Proform Order** as indicated by the checked check box; users my uncheck if desired.

User can click,

- **Browse:** Browse to find documents to submit.
- **Attachments:** Attach documents from the ProForm order.
- **Documents:** Select documents from the document repository (if using Impact).
- **Rename**: Rename added documents before submitting.
- **Delete:** Delete documents from the list of documents before submitting.

Click the **Submit** button to send your request to Pippin Title.

A message is displayed once the request has been successfully submitted. Clicking the **OK** button returns you to the **Title Services** window.
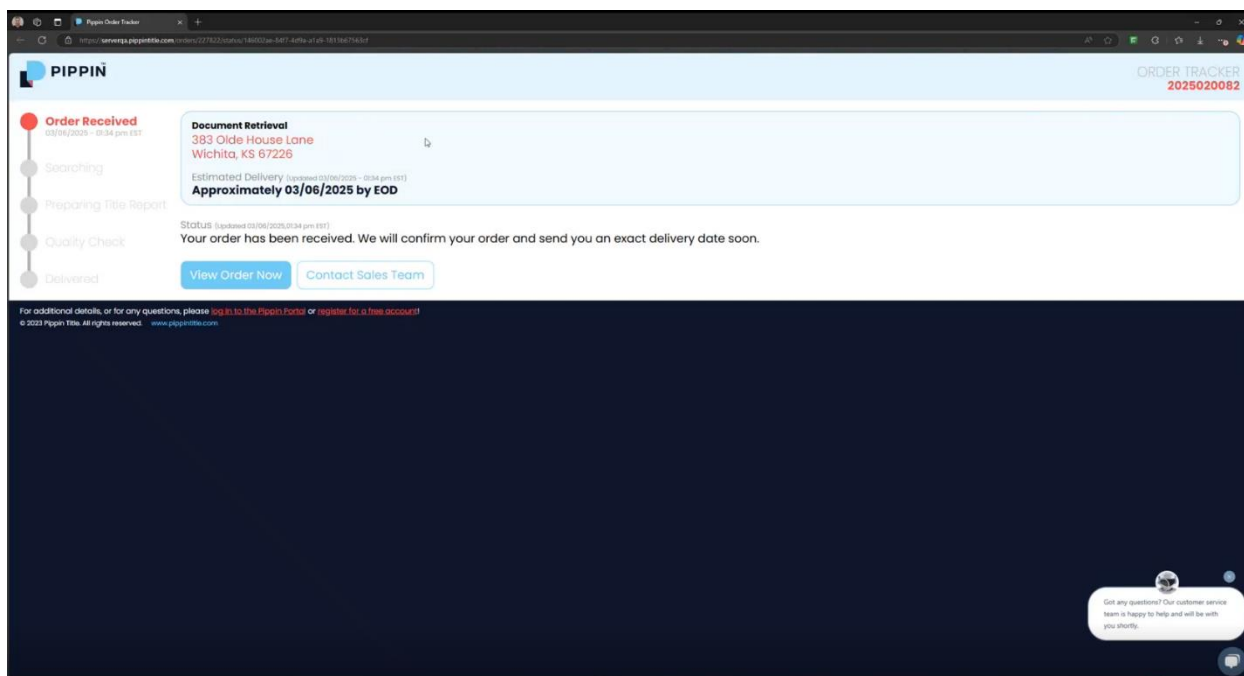
The **Status** shows the Pippin Title status as **Received**.

From here you can **Edit** or **Void** (cancel) the request while in **Received** status. Once the **Status** is updated to **Confirmed**, it can no longer be edited or cancelled.

The screen automatically refreshes whenever the application is opened.

You can also click the **Refresh** icon to refresh your submitted requests.

Click the **Order Tracker** button to open the Pippin website allowing you to view where in the process your request is.

Editing or Voiding a Request

As noted above, a request can only be edited or voided (canceled) if the Pippin Status shows as **Received**. Once the Status is updated to **Confirmed** it can no longer be edited or canceled.

Editing a Request

Clicking the **Edit** button opens the **Property and Product Selection** window (refer to the [Property and Product Selection](#) section).

As in the new submission process, the **Property and Product Selection** displays the information submitted to Pippin and can be edited from there. Updating fields on this window does not write information back to the ProFrom order.

Click **Next** to attach/remove additional document(s) or add/update a note from the original request.

Once all edits have been completed, click the **Submit** button to send the updated request to Pippin.

Voiding a Request

Clicking the **Void** button opens the **Void** window which requires you enter a Void Reason (as indicated by the red asterisk). Once the reason is entered, the **Submit** button is enabled. Click the **Submit** button to send the cancellation.

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 Pippin Title. 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 Pippin Title Search into the Select order.

- **View:** View documents sent from Pippin - 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 Pippin

When Pippin sends multiple, individual responses for your order (e.g., documents sent 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.
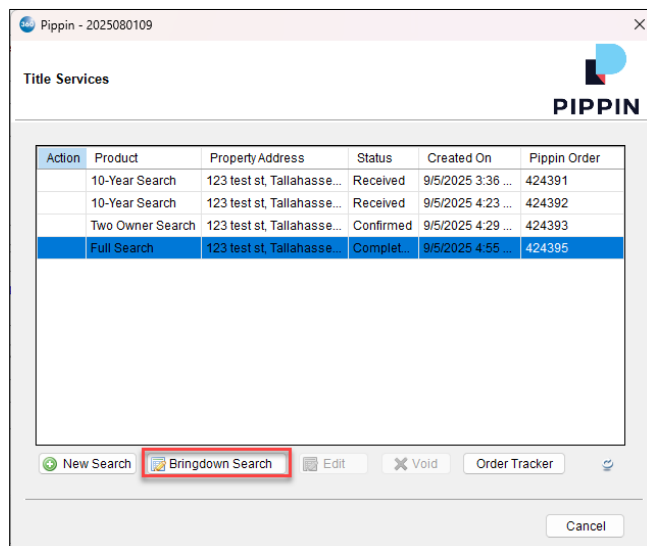
Bringdown Request

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

1. Highlight the corresponding transaction
2. Click the **Bringdown Search** button to open the **Update/Bringdown** screen

From the **Update/Bringdown** screen,

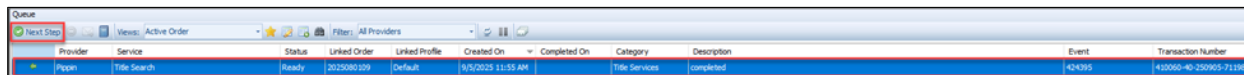3. Enter or update the,
   - **Property**
   - **County**
   - **Settlement Date**
   - **Need By Date**
4. Click the **Next** button to open the **Add Documents/Note** screen
   Add as needed.
5. Click the,
   - **Submit**; the transaction **Status** updates to **Received**
   - **Cancel** button and you are returned to the **360 Queue** without requesting the bringdown
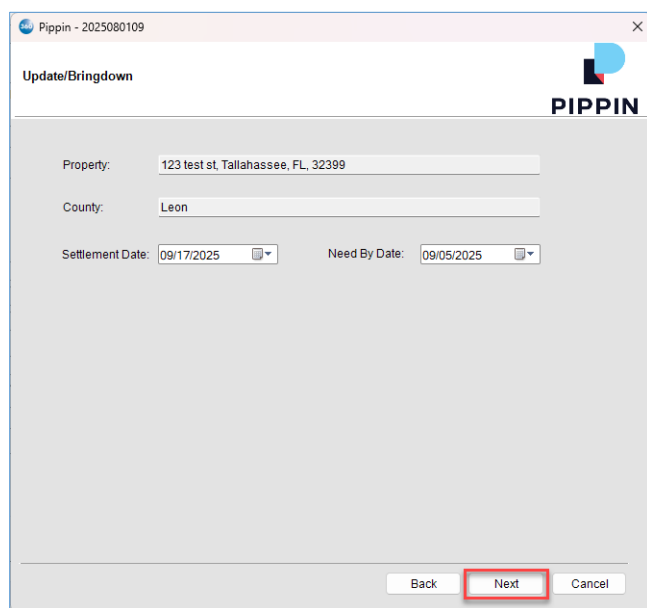
Accepting Bringdown Data & Document(s)

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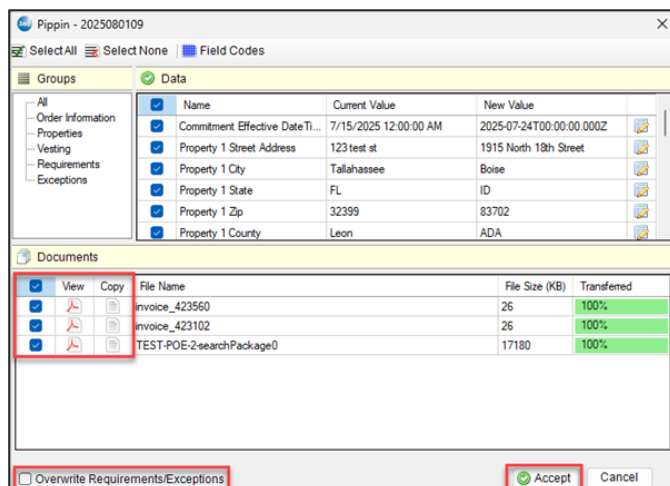

Review Screen for Bringdown Responses

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 Pippin - 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.