# Managing Property Insight within SoftPro 360

In order to help maintain a streamlined closing process the ability now exists to interact with Property Insight directly from the SoftPro product. Property Insight seamlessly pulls the property information from the Proform order allowing a quicker order submission to TitlePoint. Within TitlePoint, merely select the desired Worksheet, which can be accepted back into the ProForm order.

Chicago and Fidelity Metro will have the ability to request Tax only orders and Datedowns in addition to the existing functionality. Tax only and Datedowns will be ordered using the TitlePoint website. Please see the section titled Tax only and Datedown Orders for additional details on how to use this new functionality.

Property Insight can be found in the SoftPro 360 Products menu under the Service titled Title Services and the product titled TitlePoint.
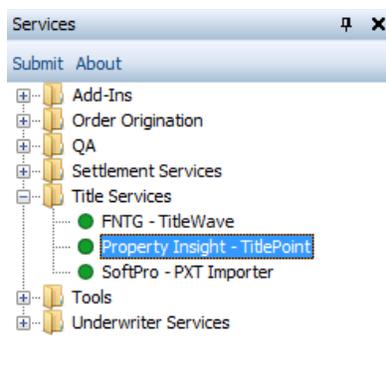

If ProForm order(s) are already opened , they will be listed in the Order Linking dialog. The active order will be highlighted and entered in the Selected Order Number field. Select from any of the open orders, or overwrite the Selected Order Number with an order that is not currently open. Click OK once the order number is correct.
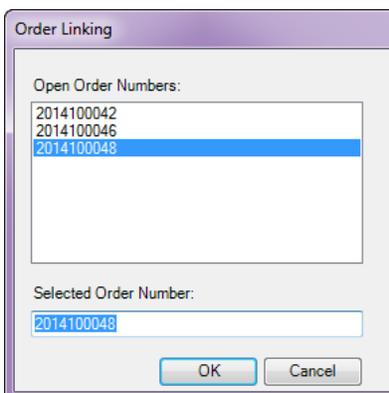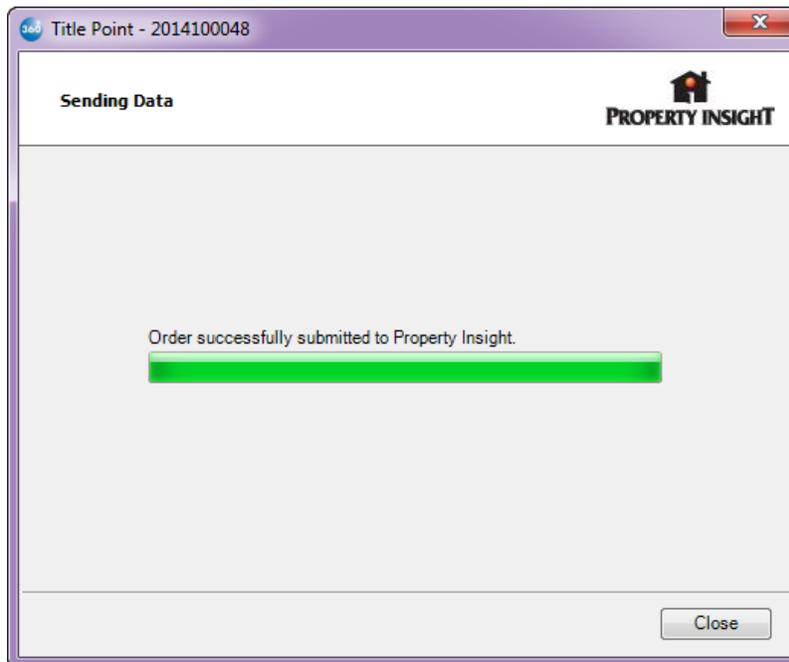
Managing Property Insight

After clicking OK on the Order Linking screen the Identity Screen will be displayed. The Requestor Identity code must be entered into the text box before progression to the next screen. Once entered, the Requestor Identity will be saved for future transactions.
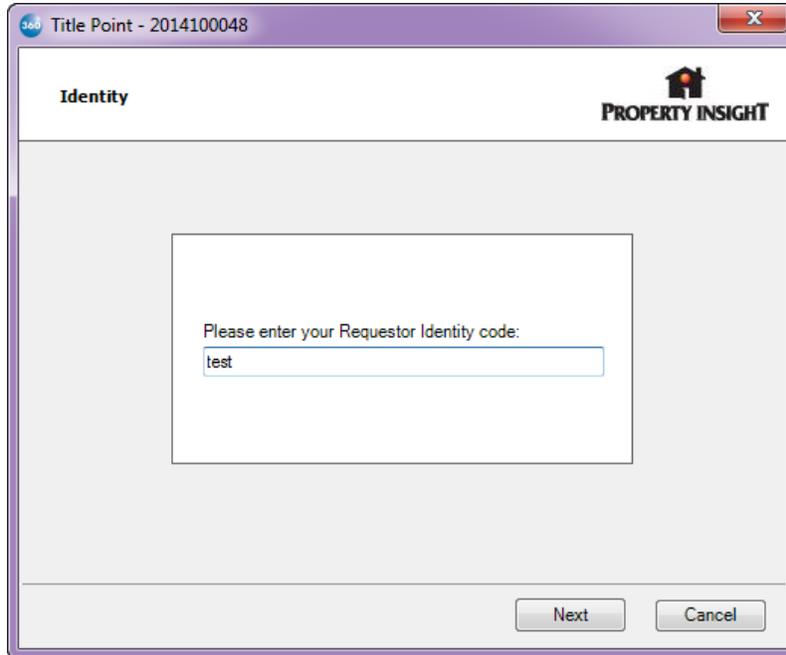
After clicking Next on the Identity screen, SoftPro 360 will send the property data from the ProForm order to Property insight and a progress bar will appear.

The SoftPro 360 Queue will update with a new Property Insight transaction in an 'In Progress' status. Valid 'State' and 'County' fields are required in the ProForm order. Note: If 'Processing' status is

displayed instead, it indicates the transaction was not successfully submitted from SoftPro 360 to TitlePoint. If 'Rejected' status is displayed instead, it indicates invalid data in the ProForm order, e.g. Property Address is for State of California, however the County is not a valid county in California.

Selecting a Worksheet

To search for a Worksheet open TitlePoint's website and search for the ProForm order by entering the order number into an Orders text box then clicking Begin Search.

The ProForm order number will appear under the Recent Activity section. To open the available Worksheets, click Starter.
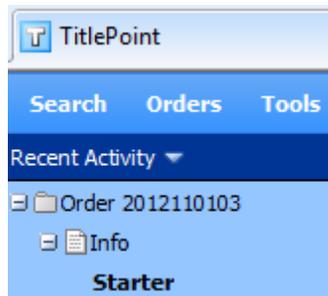
When there is more than 1 Starter, a specific Starter can also be selected on the Order page to navigate to the available Worksheets, click "Starter - <Property Address>" listed within the 'Datedown Item'.

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The Starter Search Results screen will display and list all available Worksheets that match the data submitted from the ProForm order through SoftPro 360. View a Worksheet by clicking on a specific Worksheet link.

After clicking the Worksheet link the Worksheet will open and display the General Order Information, the Vesting, the Legal description, the Schedule A, the Schedule BI and; if available, the Notes. To Export the Worksheet to SoftPro 360 click the Save/Export button in the bottom left corner of the Worksheet screen. More than one Worksheet can be exported to a transaction by individually clicking each Worksheet on the Starter Search Results page and clicking the Save/Export button.

## Accepting the Worksheet into the ProForm Order

The Property Insight transaction will automatically update to a 'Ready' status in the SoftPro 360 queue, indicating that the data can be accepted into the ProForm order. Either highlight the 'Ready' transaction or click the Review button.


Clicking on the Review button will open the Review screen and display the data captured from the Worksheet. The checkbox which appears next to the Name label must be checked for all data to be imported into the ProForm order. By default each and every box is checked.
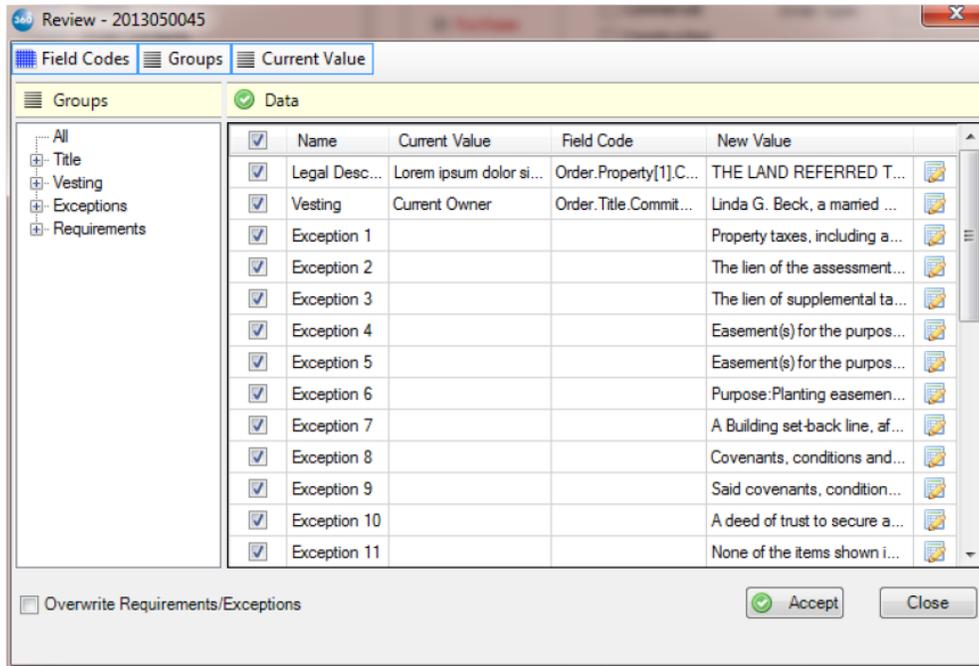
Data listed in the 'Current Value' exists in the ProForm order and the 'New Value' column lists data returned by Title Point. Checking the 'Overwrite Requirements/Exceptions' checkbox will overwrite the 'Current Value' with the 'New Value'. Note: This is specific to Requirements and Exceptions.
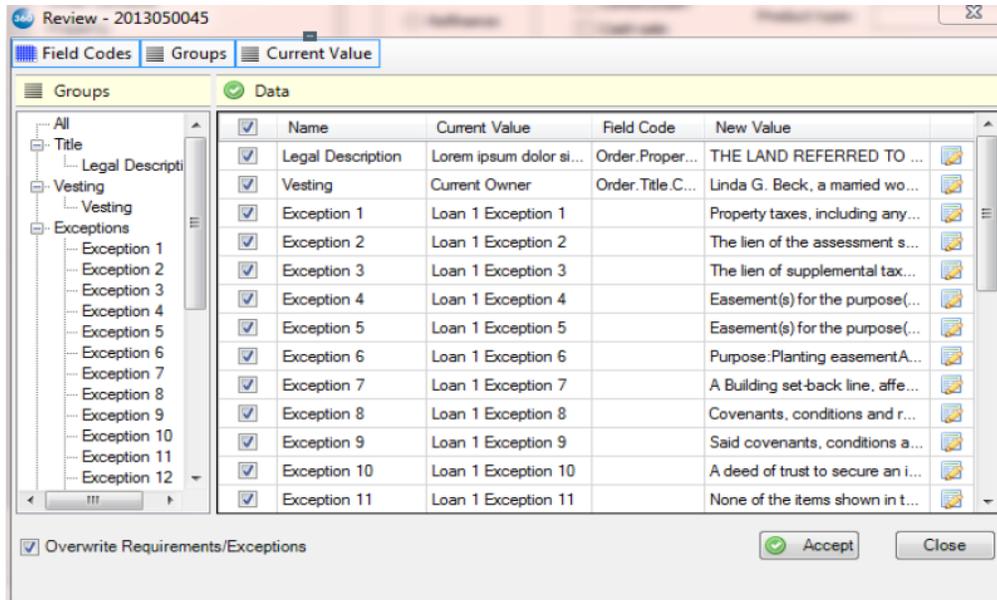

Data listed in 'New Value' column is editable and can be individually modified. Modified text in the 'New Value' column will be saved & reflect changes once 'Accept' is clicked to process the transaction. Click on the 📝 'Edit/View' icon to either view or modify text.
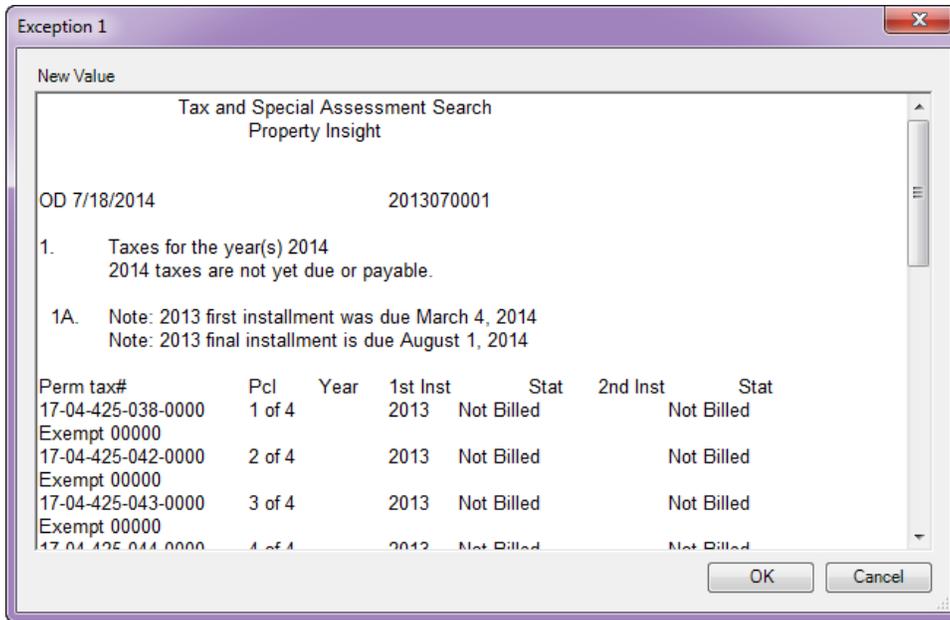
Once the 'Accept' button is clicked, the selected data on Review screen will be imported into the ProForm order. The SoftPro 360 transaction queue will display the status as 'Completed'.
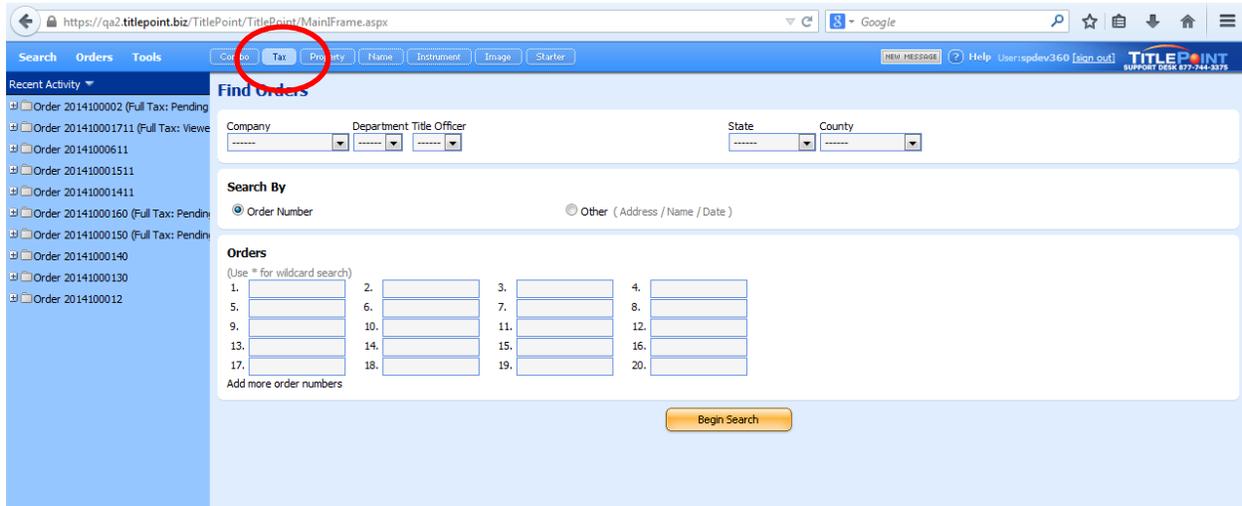

Log details can be viewed by clicking on the ⬜Log icon within the SoftPro 360 transaction queue's ribbon. The log displays the Submit, Remit and Accept status for a Completed transaction along with any error messages received.
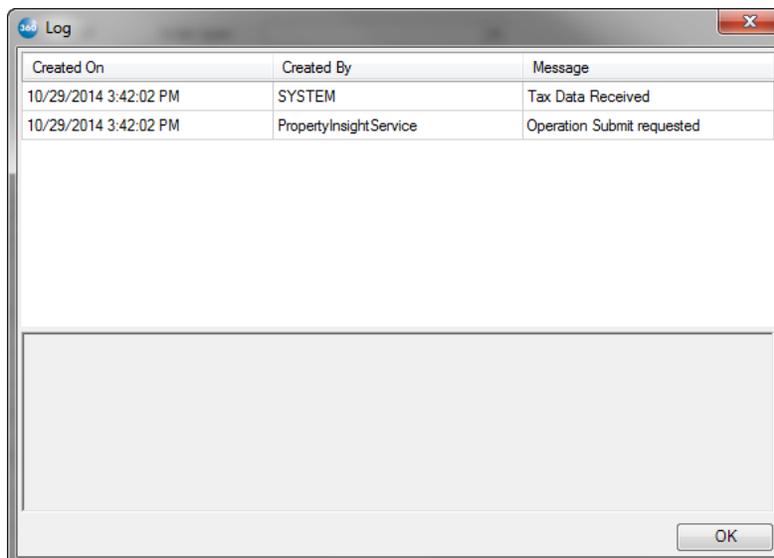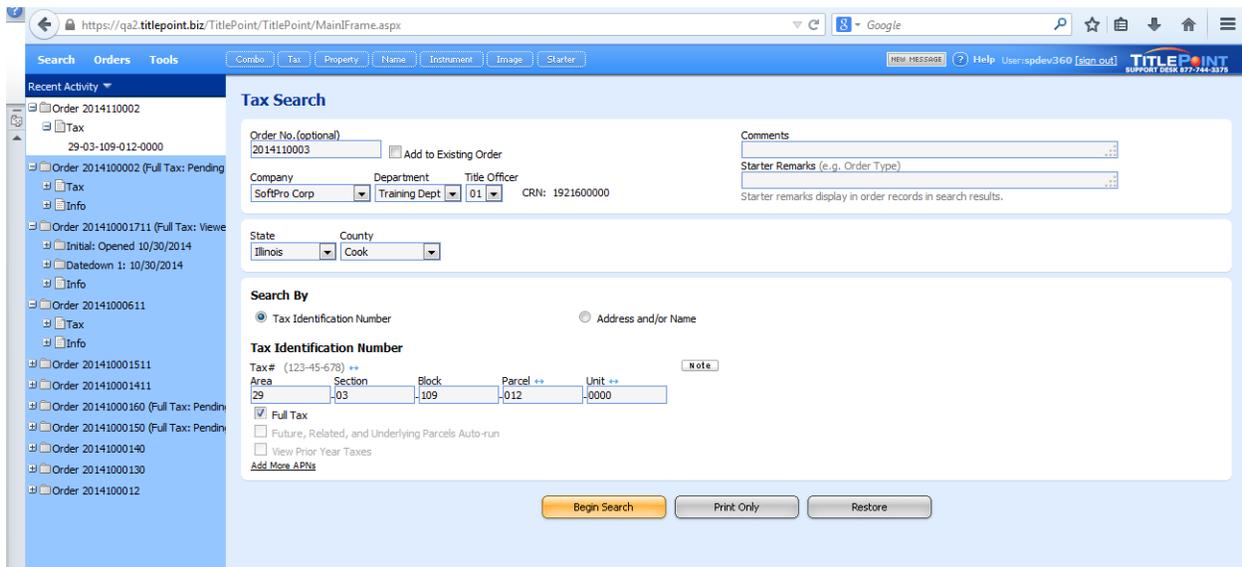
Requesting a Tax Only Order

If a starter is not needed, a tax only order request can be made by logging on to the Title Point website. It is not necessary to use the SoftPro 360 product to initiate a tax only order request; however a ProForm order must be created. After logging into the Title Point website, click on the Tax tab.

Enter the ProForm order number into the Order No. Field and enter in the Tax ID number or the property address in the Search By section. Click the 'Full Tax' Click Begin Search when complete.

After clicking Begin Search, the request is sent to the Tax Maintenance team for processing which usually takes 2 – 3 business days to process. Tax Results will be displayed on the screen under the Order Number in the Recent Activity section. The status of the request will also be shown. When the status reads 1 of 1 done, the order has been fulfilled by Tax Maintenance and is now available to be accepted into the ProForm order.

A Tax Only Request received from Title Point will create a New SoftPro 360 transaction in the 360 Queue. As soon as the transaction is received by SoftPro 360, the status is changed to 'Ready.' Open the SoftPro 360 queue. The linked ProForm order number will be displayed in the Linked To field in the 360 queue. After the order is located, either double click the transaction or highlight the transaction and click Next Step.

The Review Screen will be opened and will have the Tax Request order as the first Exception listed. To review the entire exception and make any edits, click the edit icon. When complete, click Accept and the exception will be saved to the ProForm order. Tax only orders will always be saved to the first exception in the exceptions section of the ProForm order. If any other exceptions existed before the Tax Only request is received; they will be moved down to the next exception slot.

Requesting a Date Down Order

Requesting a Date Down must be made by accessing the Title Point Website. To order a Date Down, an order must have previously been placed either via SoftPro 360 or by doing a Tax Only request. After logging into Title Point, click on Orders and select Date Down.
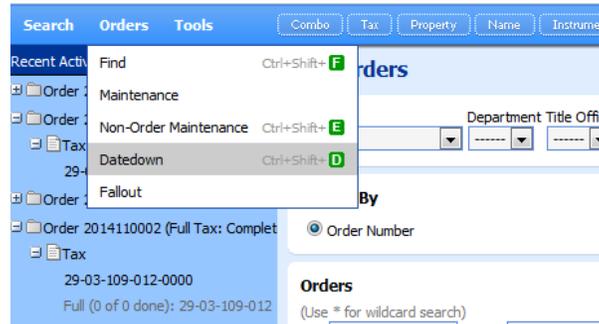

The Find Orders screen will be displayed. Enter in the ProForm order number that needs a Date Down and click Begin Search.
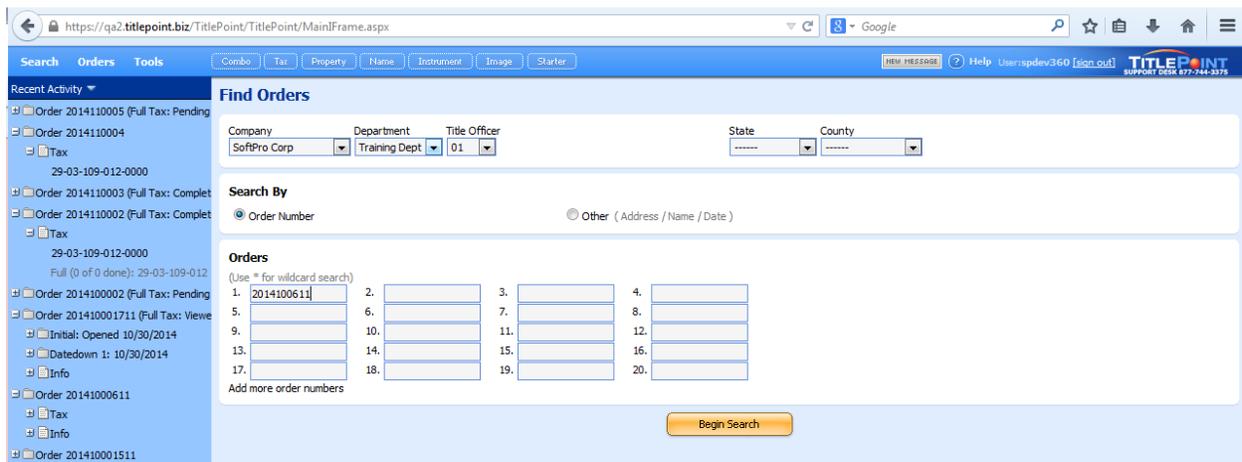
After clicking Begin Search, the request is sent to the Tax Maintenance team for processing which usually takes 2 – 3 business days to process. Date Down results will be displayed on the screen under the Order Number in the Recent Activity section. The date of the request will be displayed with a status of the request. When the status reads 1 of 1 done, the order has been fulfilled by Tax Maintenance and is now available to be accepted into the ProForm order.
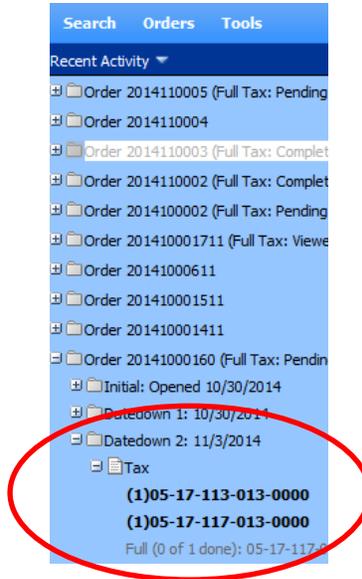
A Date Down received from Title Point will create a New SoftPro 360 transaction in the 360 Queue. As soon as the transaction is received by SoftPro 360, the status is changed to 'Ready.' The steps to accept the Date Down exception into ProForm are the same as accepting a Tax Only order request.