

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.

Order Linking	
Open Order Numbers: 2014100042	
2014100046 2014100048	
Selected Order Number:	
2014100048	
OK Cancel	

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.

🥶 Title Point - 20	14100048
Identity	PROPERTY INSIGHT
	Please enter your Requestor Identity code: test
	Next Cancel

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.

C	Queue													
🛇 Next Step 💿 🖂 📄 Views: Active Order 🔹 👉 🔂 🔂 🖬 Filter: Property Insight 🔹 🛫 🏢														
	Transaction Number		Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On					
	¢	410060-60-141028-00	Property Insight	TitlePoint	In Progress	2014100048	Default	Shelly Wilburn	10/28/2014 9					
	\$	410060-60-141028-00	Property Insight	TitlePoint	In Progress	2014100048	Default	Shelly Wilburn	10/28/20148					

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.

📊 TitlePoint	
Search Orders Tools	Combo Tor Property (Home) Invirance Inage (Starler)
Recent Activity 🖛	Find Orders
JOrder 2012110103 ⊞ _]Info JOrder 2012110102	Company Department Title Officer State County
🖲 🗋 Order 2012110101	Searth By
1 Crder 2012110098	Other (Address / Name (Det=)
Drder 2012110095	
	Orders
🗉 🧰 Order 2012110094	1. 2012110103 2. 3. 4.
🗉 🗀 Order XAT 12000309	5. 6. 7. 8.
🗄 🗀 Order 2012110157	9. 10. 11. 12.
🗩 🗀 Order 2012110156	13. 14. 15. 16.
	17. 18. 19. 20.
	Eegin Search

The ProForm order number will appear under the Recent Activity section. To open the available Worksheets, click Starter.

TitlePoint										
Search	Orders	Tools								
Recent Activity 👻										
🗆 🗀 Order 🛛	2012110103									
🖯 🖻 🗐 Info										
Sta	rter									

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'.

Search Orders Tools	Combo (Tax) (Property) (Name Instrument (Image (Starter			NEU	N MESSAGE 🕐 Help	User:spdev360 <u>[sign out]</u>	SUPPORT DESK 877-744-3375
Recent Activity 🔻	Order 2014100002								
⊐ □Order 2014100002									
∃ ⊡Tax	Creation Last Sea	rch	Company SoftBro Com	Department T	0	CRN	Starter Remarks	Status	Full Tax Ronding
	Comments:	014	Solutio corp	Training Dept	•	1921000000		Open	rending
Dorder 201410001711 (Full Tax: Viewe	commenca.								
± □Order 20141000611	🔻 Maintena	nce		▼ Add Searc	h		▼ [Oatedown Order	
nter 201410001511							0	Drier Diant Date	
∄ 🗇 Order 201410001411	Close	Order	Edit Order Info	Add Ta	x	Add Instru	ment O	Initial Plant Date	Run Datedown
🗉 🗀 Order 20141000160 (Full Tax: Pendin	(Goo	for Starter)		Add Pro Add Pa	perty rty Property	Add Combi			More Options
🗉 🗀 Order 20141000150 (Full Tax: Pendin	Delet	e Order		Add Na	me	Add Starte	er	(mm/dd/yyyy)	
n 🗇 🗇 Order 20141000140	(Not o Den	Good for Starter) Order				Add ProSig	pht		
∄ 🗇 Order 20141000130									
≝ ☐Order 2014100012	🔲 Datedown Item 🔻	🕒 Print 🔻	🖃 Email v	🔙 Sav	/e▼	📑 Merge	•	🗇 Delete	🗈 Full Tax
🗉 🗀 Order 20141000090 (Full Tax: Pendin	🖃 🗐 🔲 Order 2014100002				Pages	# Copies	State/County	Plant Date	From Date
	🗉 📄 🔲 Tax								
	29-03-109-01	2-0000					IL/Cook		
	Full (0 of 0 done): 29-03-109-012					IL/Cook		
	🖃 📄 🔲 Info								
	:≡ 🔲 ? 14110 Park	Ave/Dolton					II /Cook		

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.

Start + Retrie	Starter Search Results + Retrieve Images Besults 1-1000 of 1000 Show Filter													
Results 1-1000 of 1000 Show Filter														
	• # •	Catego	ry Type		Date	Propert	y ID#		Address	Map Ref				
	• 1	Prelim	Othe	27		226-003	4-012-0000	503 SACRAM	0 CAREY RD , IENTO, CA 9583	5				
View:	Vesting	Legals	Exceptions	Worksheet	Order Number:	8117532	County: SACRA	MENTO	Source: Proper	ty Insight - NGS				
	▶ 2	Prelim	Othe	2r		225-151	0-083-0000	5169 N/ SACRAM	ANTUCKET WAY 1ENTO, CA 9583	, 5				
View:	Vesting	Legals	Exceptions	Worksheet	Order Number:	31112026	County: SACR	AMENTO	Source: Prope	rty Insight - NGS				
	▶ 3	Prelim	Othe	27		225-151	0-083-0000	5169 N/ SACRAM	ANTUCKET WAY 1ENTO, CA 9583	, 5				
View:	Vesting	Legals	Exceptions	Worksheet	Order Number:	31112026	County: SACR	AMENTO	Source: Prope	rty Insight - NGS				
	▶ 4	Prelim	Othe	2r		115-057	0-063-0000	7713 HAR SACRAM	VEST WOODS D IENTO, CA 9582	R , 8				
View:	Vestina	Legals	Exceptions	Worksheet	Order Number:	776018	County: SACRAN	IENTO	Source: Property	/ Insiaht - NGS				

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.

Image: Constraint of the second system of
Image: Select All Image: Select All <t< th=""></t<>
SELECT ALL SCHEDULE A > I1 Fee Estate > T1 A Lien Not Yet Payable > T5 PIQ - Tax Defaulted > T9 Possible Lien of Supplemental Taxes > FF Freeform Text - Regular Numbering
Image: Select All Image: Schedule A Image: Schedule BI Ima
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FF Freeform Text - Regular Numbering
E4 Easements on Tract Map
E1 Easement Created by Express Grant
E2 Easement Reserved in Conveyance
✓ → G12 Homestead Declaration
D1 Deed of Trust
D3 Assignment of Trust Deed
D1 Deed of Trust
V21 Possible Invalidity of Trust
✓ → NOTES
CA2 Owner does NOT qualify
A3 Endorsement Form 116 Information Note
✓ N2A No Deeds Within 24 Months
T4A Taxes for Proration - UNPAID
CA4 Request for Copy of CCRs Notice
V N14 Wiring Instructions - Generic
☑ ▶ N17 Notary Requirement

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.

Queue	Queue												
🖉 Next Step 💿 🖂 🖥 Views: Ready 🔹 🚖 🥀 🧖 🔀 🛱 Filter: Property Insight 🚽 🛫 🏢													
	Transaction Number	Provider	Service 🔺	Status	Linked Order	Linked Profile	Created By	Created On					
\$	410060-10-141022-026220	Property Insight	TitlePoint	Ready	2014100015-Task		Property Insight Service	10/22/2014 11:51 AM					
	410060-10-141022-026219	Property Insight	TitlePoint	Ready	2014100014-Task		Property Insight Service	10/22/2014 11:51 AM					
	410060-10-141022-026218	Property Insight	TitlePoint	Ready	2014100004-Task		Property Insight Service	10/22/2014 11:51 AM					
-			THE ST.	- I			a constraint of						

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.

🥯 Review - 2013050045			a further	1			٢
Field Codes 🗮 Groups	≣ Cu	rrent Value					
Groups	🕑 Da	ita					
All	V	Name	Current Value	Field Code	New Value		
⊕ litle ⊕ Vesting	1	Legal Desc	Lorem ipsum dolor si	Order.Property[1].C	THE LAND REFERRED T		
	1	Vesting	Current Owner	Order.Title.Commit	Linda G. Beck, a married		
	1	Exception 1			Property taxes, including a		Ξ
	V	Exception 2			The lien of the assessment		
	V	Exception 3			The lien of supplemental ta		
	V	Exception 4			Easement(s) for the purpos		-
	1	Exception 5			Easement(s) for the purpos		
	1	Exception 6			Purpose:Planting easemen		
	1	Exception 7			A Building set-back line, af		
	1	Exception 8			Covenants, conditions and		
	1	Exception 9			Said covenants, condition		
	1	Exception 10			A deed of trust to secure a		
	1	Exception 11			None of the items shown i		÷
Overwrite Requirements/	Exceptio	ons			Accept (lose	

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.

Groups	🕑 Da	ata					
All	V	Name	Current Value	Field Code	New Value		1
- Title		Legal Description	Lorem ipsum dolor si	Order.Proper	THE LAND REFERRED TO		٦
- Vesting	V	Vesting	Current Owner	Order.Title.C	Linda G. Beck, a married wo		
Vesting	V	Exception 1	Loan 1 Exception 1		Property taxes, including any		
Exceptions Exception 1	V	Exception 2	Loan 1 Exception 2		The lien of the assessment s		
Exception 2		Exception 3	Loan 1 Exception 3		The lien of supplemental tax	2	
Exception 3		Exception 4	Loan 1 Exception 4		Easement(s) for the purpose(2	
Exception 4	V	Exception 5	Loan 1 Exception 5		Easement(s) for the purpose(
Exception 6	V	Exception 6	Loan 1 Exception 6		Purpose:Planting easementA		
Exception 7	V	Exception 7	Loan 1 Exception 7		A Building set-back line, affe		
Exception 9		Exception 8	Loan 1 Exception 8		Covenants, conditions and r		
Exception 10	v	Exception 9	Loan 1 Exception 9		Said covenants, conditions a		
Exception 11	V	Exception 10	Loan 1 Exception 10		A deed of trust to secure an i		
	V	Exception 11	Loan 1 Exception 11		None of the items shown in t		

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 P'Edit/View' icon to either view or modify text.

Exception 1					×
New Value					
Tax a	nd Special As Property Ir	ssessment Sea Isight	arch		
OD 7/18/2014		2013070	001		=
1. Taxes for the y 2014 taxes an 1A. Note: 2013 firs Note: 2013 fin	year(s) 2014 e not yet due st installment al installment	or payable. was due Marc is due August	h 4, 2014 : 1, 2014		
Perm tax#	Pcl Ye	ear 1st Inst	Stat	2nd Inst Stat	
17-04-425-038-0000 Exempt 00000	1 of 4	2013	Not Billed	Not Billed	
17-04-425-042-0000 Exempt 00000	2 of 4	2013	Not Billed	Not Billed	
17-04-425-043-0000	3 of 4	2013	Not Billed	Not Billed	
17.04.425.044.0000	A of A	2012	Not Pillod	Not Billod OK Ca	

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'.

	Queue									
	🖉 Review	Deliver 🙊 🕒 📘 🕔	/iews: Active Order	*	🊖 📝 🖪	箭 Filter:	Prop	erty Insight	- 🥥 💷	
		Transaction Number	Provider	Service	Status	Linked Order		Created By	Created On	Completed On
ľ	\$	410060-10-121108-005074	Property Insight	TitlePoint	Completed	2012110103		kathy cada	11/8/2012 1:50 PM	11/8/2012 3:00 PM

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.

🕹 Log		
Created On	Created By	Message
10/29/2014 3:42:02 PM	SYSTEM	Tax Data Received
10/29/2014 3:42:02 PM	PropertyInsightService	Operation Submit requested
		OK

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.

https://qa2.titlepoint.biz/T	tlePoint/TitlePoint/MainIFrame.aspx	⊽ C Soogle	▶ ☆ 自 ♣ 余 ☰	
Search Orders Tools	Cor bo Tax Projety Name Instrument		NEW MESSAGE	P Help User:spdev360 [sign out]
Recent Activity 🔻	Find on the			
Drder 2014100002 (Full Tax: Pendir	9			
🗄 🗂 Order 201410001711 (Full Tax: Viev	e Company Department Title Officer		State County	
∃ □Order 20141000611	• •		•	
∃ 🗇 Order 201410001511				
■ Corder 201410001411	Search By			
∄ 🗇 Order 20141000160 (Full Tax: Pend	in: Order Number	Other (Address / Name / D	Date)	
B Order 20141000150 (Full Tax: Pend	in			
∃ 🗇 Order 20141000140	Orders			
■ Corder 20141000130	(Use * for wildcard search)	3		
∃ 🗇 Order 2014100012	5 6	7. 8.		
	9, 10,	11. 12.		
	13. 14.	15. 16.		
	17. 18.	19. 20.		
	Add more order numbers			
		Be	anin Search	
			ginsearch	

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.

9	← A https://qa2.titlepoint.biz/Title	Point/TitlePoint/MainlFrame.aspx 🗸 C 🗧 - Google 🖌 🎓 🗧
	Search Orders Tools	Condo Ta: Broperty Name Instrument Image Stater
-	Recent Activity 🔫 🖃 🗇 Order 2014110002	Tax Search
•	 ☐ Tax 29-03-109-012-0000 ☐ Order 2014100002 (Full Tax: Pending ☐ Tax ☐ Tax ☐ Info 	Order No.(optional) Comments 2014110003 Add to Existing Order Company Department SoftPro Corp Training Dept v Training Dept v 01 v CRN: 1921600000
	Order 201410001711 (Full Tax: Viewe Dinitial: Opened 10/30/2014 Datedown 1: 10/30/2014 Taxes	State County Illinois 💌 Cook 💌
	Order 20141000611 Tax Info	Search By Tax Identification Number Address and/or Name Tax Identification Number
		Tax # (123-45-78) ++ Note Area Section Block Parcel ++ Unit ++ 29 -03 109 -012 -0000
		Full Tax Full Tax Future, Related, and Underlying Parcels Auto-run Wew Prior Year Taxes Ad More APMs
	# Order 2014100012	Begin Search Print Only Restore

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.

Search Orders Tools	Combo Tax Property	Name Instrument In	nage Starter		NEW MESSAGE	P Help User:spdev360 [sign_out]
Search Parameters	Tax Search Results					
Tax Search	Full Tax Search 👻 💾 Print i	tesults 🔻 🖃 Email 🔻 🔚 Sa	we 🔻 Options 🔻			
IL / Cook	Tax Year: 2013			Tax ID: 29-03-109-012		Payments as of: 10/20/2014
29-03-109-012-0000 Chicago	Address: City:	14106 PARK AV DOLI	TON IL 60419-1031			Volume No: 194
▶ <u>Show Details</u> -	Assessed Owner(s):	KENNETH WATSON 🖉 Search All Owners 🖉				
۰ III ا	Search As:	Tax ID 29-03-109-01	<u>2</u> 🖉			
Recent Activity 🔻	Comment:					
Dorder 2014110005 (Full Tax: Pending	Installments					
Order 2014110004	Installments				a	105 D (
	Installment	Amount	Due Date	Amount Paid	Status	NSF Ker
🗆 🗀 Order 2014110002 (Full Tax: Pending	and	\$1,739.45	8/1/2014	\$1,739.45	PAID	
∃ 🔄 Tax	Current Year (2013) Tota	Bill: \$3,189,79	0/1/2014	\$1,450.54	FAID	
29-03-109-012-0000	Last Year (2012) Total Bil	l: \$3,162.63				
Full (0 of 0 done): 29-03-109-012	Open rior Years	Special Assessments	Back Taxes	Additional		
Dirder 2014100002 (Full Tax: Pending	0	0	0	0		
b _ Lax ∄ ≣ Info	Parcel Status: PERMANEN	T Property Sta	tus: TAXABLE			
□ Order 201410001711 (Full Tax: Viewe □ Initial: Opened 10/30/2014 □ Datedown 1: 10/30/2014 □ Info						

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.

🚳 Review - 2014100030	-	Carl Designed in cardinal state			×		
Field Codes 🔳 Groups	Current Value						
Groups	🛇 Data						
Al		Name	Current Value	New Value			
±- Exceptions	V	Exception 1		{{Tax and Special Asse	essm 🔯		
Overwrite Requirements/	Exception	IS		Accept	Close		

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.

Search	Orders	Tools		Combo)(Tax Property Name Instrumer
Recent Activ	Find		Ctrl+	-Shift+ F	rders
🗄 🗀 Order 🕯	Maintenar	nce			
Crder 1 ⊡Order 1	Non-Orde	r Maintenance	Ctrl+	-Shift+ 🖪	Department Title Offic
29-1	Datedown	ı	Ctrl+	-Shift+ D	
∃ Corder (Fallout				Ву
∃ 🗀 Order 2	014110002	(Full Tax: Com	plet	Orde	er Number
🗆 🗆 🗖 Tax					
29-0	3-109-012-	0000		Orders	
Full	(0 of 0 done	e): 29-03-109-0)12	(Use <u>*</u> fo	r wildcard search)

The Find Orders screen will be displayed. Enter in the ProForm order number that needs a Date Down and click Begin Search.

← ▲ https://qa2.titlepoint.biz/Title	Point/TitlePoint/MainIFrame.aspx 🗸 C 🔂 - Google 🖉 🎝 🖨 🖡 🚔	
Search Orders Tools	Conto Tax Property Name Instrument Image Starter Inter HESSORI (?) Help Userspidev360 [sign_out]	
Recent Activity 🤝 🖽 🗂 Order 2014110005 (Full Tax: Pending	Find Orders	
Gran 2014110004	Company Department Title Officer State County SoftPro Corp Training Dept 01	
	Search By	
Corder 2014110002 (Full Tax: Complet Tax	Order Number Other (Address / Name / Date)	
29-03-109-012-0000 Full (0 of 0 done): 29-03-109-012 Corder 2014100002 (Full Tax: Pending Order 201410001711 (Full Tax: Viewe Cinitial: Opened 10/30/2014 Cinitial: Opened 10/30/2014 Cinitial: Opened 10/30/2014 Cinitial: Opened 10/30/2014 Cinitial: Opened 10/30/2014	Orders (Jae "for wildcard search) 1 2014100611 2 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 Add more order numbers	
	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.