

Title Resource Group - Title Search User Guide

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Introduction

Title Resource Group's Title Search product, allows agents to order Title Search products via SoftPro 360. The Title Resource Group - Title Search integration with SoftPro 360 provides users with the ability to seamlessly place orders for Title Resource Group - Title Search's products 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 documents from Title Resource Group - Title Search all from within SoftPro 360.

History

Date	Version	Details
June 27, 2024	1.0	Updated

Features

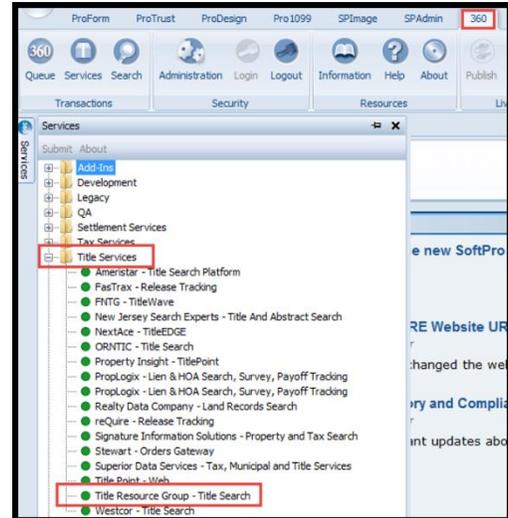
Title Resource Group - Title Search users can:

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

Launching Title Resource Group - Title Search

Access From The 360 Services Menu

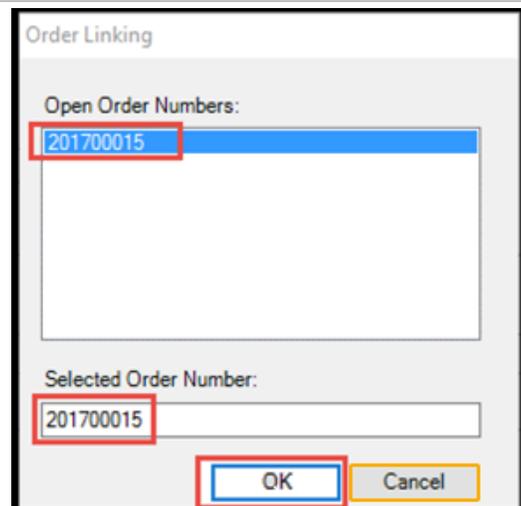
From the **360** → **Services** menu, double-click **Title Resource Group - Title Search** located under the **Title Services** folder. This will open the **Order Linking** screen:



Select a ProForm Order for Your Search

You must link each transaction to a ProForm Order. If you already have ProForm order(s) open, they will be listed in the **Order Linking** dialog. The **current active order** will be selected & appear in the **Selected Order Number** field. Once you have confirmed the order, click **OK**:

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 **Order Summary** screen.



Order Summary Screen

The **Order Summary** screen allows the user to select the **Product**, add a **Due Date**, select the contact ordering the product, select the **Property** (if multiple properties exist on the order) and **Add Documents**, before submitting a request to Title Resource Group.

- **Product:** Select to add product to be submitted with request.
- **Due Date:** User can add a due date to submit with the request; however, this information is not required.
- **Settlement Agent, Title Company, Escrow Company, Other:** Information added for the selected contact within the ProForm order will populate into the fields; however, if the user selects 'other', the user can enter information for that contact on this screen.
 - **Ordered by, Phone:** This information is required to submit a request and an asterisk will show that required information is missing. The user will not be able to submit the request until required information is completed.
- **Property(s):** Information for the properties added within the ProForm order will populate into the fields. The user can send a request for all properties or choose the property(s) to be submitted with the request.
 - Changes to the property information will have to be done within the ProForm order.
- **Commercial:** For Select users, this box will be checked if the ProForm order is marked as a commercial order. For Classic users, the user will check this box if the ProForm order is a commercial order.
- **Add Documents:** Click this link to add documents to be included in your request to Title Resource Group - Title Search. See the [Adding Documents](#) section of this guide for more detail.

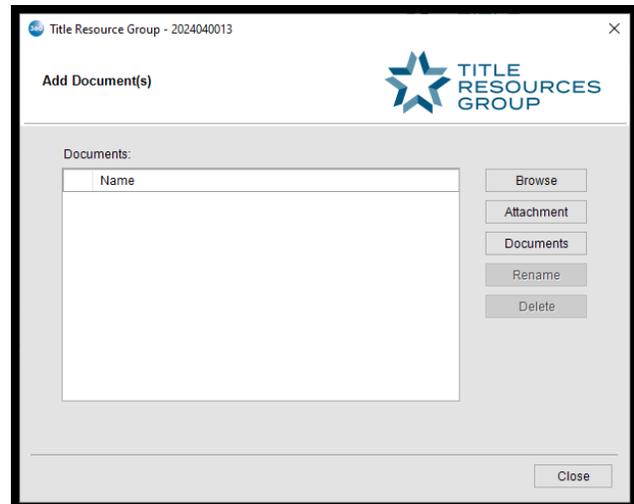
The screenshot shows the 'Order Summary' window for Title Resource Group. The window title is 'Title Resource Group - 2024040013'. The form contains the following elements:

- Product:** A dropdown menu set to 'Current Owner'.
- Due Date:** A date selection field.
- Settlement Agent:** Radio buttons for 'Settlement Agent', 'Title Company', 'Escrow Company', and 'Other'.
- Ordered by:** A text input field.
- Address:** Two stacked text input fields.
- City:** A text input field.
- State:** A dropdown menu.
- Zip:** A text input field.
- Phone:** A text input field with a placeholder '(123) 456-7891'.
- Property(s):** A table with columns 'Address', 'City State Zip', and 'County'. A 'Commercial' checkbox is to the right.
- Note:** A text area with an 'Add to Proform Notes' checkbox.
- Buttons:** 'Add Documents' (blue link), 'Submit', and 'Cancel'.

Adding Document(s)

The **Add Document(s)** screen allows the user to attach documents before submitting the request to Title Resource Group. After selecting documents, click **Close**:

- **Browse:** Browse to find documents to submit.
- **Attachments:** Attach documents from the ProForm order.
- **Documents:** This button is not applicable to Title Resource Group - Title Search transactions at this time.
- **Rename:** Rename the documents before submitting.
- **Delete:** Delete documents from the list of documents before submitting.



Accepting Data & Document(s)

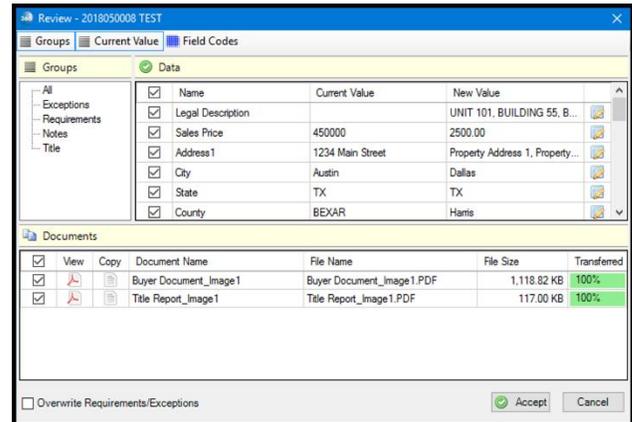
In the 360 queue the transaction status will show as 'ready' when data and documents have been sent from Title Resource Group - Title Search. The transaction status will be 'READY' which indicates a response has been received and is ready to be reviewed. The user will click **next step** to review the data and documents. Multiple remits sent by Title Resource Group will queue to ensure all data and documents are received in the transaction.

Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On	Category	Description
Title Reso...	Title Search	Ready	2024060025	Default	Alex Drake	6/25/2024 1:...	Title Services	Current Owner

Review Screen

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

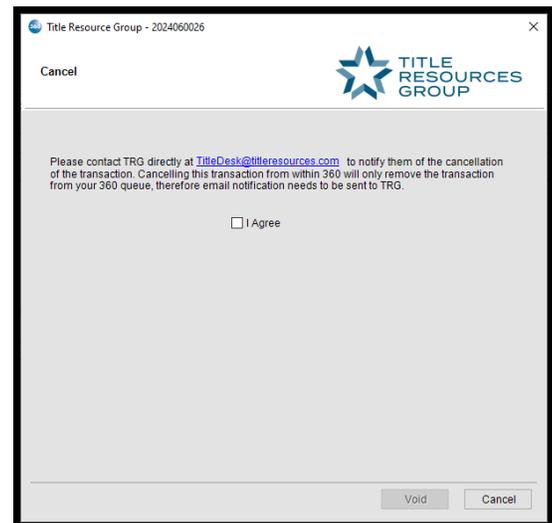
- **View:** View documents sent from Title Resource Group - Title Search.
- **Copy:** Save a copy of the document to the clipboard.
- **Accept:** Attach the document(s) to the Select order.
- **Overwrite Requirements/Exceptions:** When this option is checked, requirements and exceptions saved to the ProForm order will be removed and only the latest requirements and exceptions will be added to the ProForm order.



The accepted documents will be saved as attachments section of the ProForm order.

Canceling a Transaction

In the 360 queue the transaction status will show as 'ready' when data and documents have been sent from Title Resource Group - Title Search. The transaction status will be 'READY' which indicates a response has been received and is ready to be reviewed. The user can click the cancel option to cancel the transaction within 360 when the transaction is in a 'ready' or 'in progress' status. To cancel the transaction with Title Resource Group, the user will have contact Title Resource Group to actually cancel the transaction.



Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On	Category	Description	Transaction Number
Title Reso...	Title Search	Ready	2024060026	Default	Alex Drake	6/25/2024 1:...	Title Services	Current Owner	410060-40-240625-384368