

Managing Title Resources Guaranty Company Transactions in SoftPro 360

How to Submit a Transaction to Title Resources - Online Services

The **Title Resources - Online Services** application, allows agents to order Letters and Policy Jackets via SoftPro 360. Title Resources - Online Services can be found in the SoftPro360 Services menu under Underwriter Services. Double click **Title Resources - Online Services**, or highlight it and click **Submit** to place an order.



If a ProForm order(s) is opened, it will be listed in the **Order Linking** dialog. The active order will be highlighted and entered in the Selected Order Number field. Any of these open orders can be selected or the Selected Order Number field can be overwritten with an order that is not currently open.

Click **OK** to continue.

Open Order N	umbers:		
2015070016			
elected Orde	r Number:		
015070016			
010010010			_
	0	Canad	

The Welcome screen provides you with information about **Title Resources Guaranty Company**. You may choose to skip this screen in the future by clicking on the Skip Welcome Page option. Click Next to continue.

Welcome		RESO	JRCES
Title Resources is pleased to offer or Our Agents can easily: • Create closing protection lett • Generate policy jackets and • Edit closing protection letters • Increase title production effic • Avoid double entry across m	ur Agents a convenient integrati ters and good standing letters policy numbers s eiency ultiple systems	on with SoftPro 360.	
Please visit our website for First T For more information: Title Resources Guaranty Comp 8111 LBJ_Freeway, Suite 1200	Time User Registration or to re	set your password.	
Dallas, TX75251 800-526-8018 www.TitleResources.com ICL@TitleResources.com		Nex	t Cancel

The Login screen requires you to enter your user ID and password provided by **Title Resources Guaranty Company**. Your User ID and Password will be remembered when the '**Remember Me**' checkbox is checked.

Login	RESO	URCES
	Provide your Title Resources credentials User ID: SoftproUser? Password:	
First Time User Reg	stration Back N	ext Cancel

The Title Services screen will show all **Title Resources – Onine Services** transactions related to this order. Title Resources Guaranty Company offers services to order both Letters and Policy Jackets.

Title	Services				LE SO	URCE	S
ction	Product	Туре	Insured	Amount	Status	Created On	
			To add a product, click th	ne "Add Product" button bek	ow.		
A	dd Product					Edit\ Void	<u>ي</u>
				Back		Clo	se

To order a Letter, click the green Add Product icon.



Choose "Letters" to attach a new Protection Letter or Good Standing Letter to your ProForm order.

Ordering Title Resources - Online Services Letters

After clicking Letters, if you have access to multiple Agents, you will be presented with the **Agent Selection Screen**



Select the appropriate Agent and Click **Next** to proceed to the Letter Information Screen.

Letter Information Screens

The **Letter Information Letter** screen will allow you to select the type of letter you want to request. The Loan Number; Transaction Amount; Borrowers' Names; and Property Address will populate from the ProForm Order. Select the parties that apply for the selected letter and click Next to continue.

Letter Informa		RCES
Agent Information:	ABC Title Company USA	
Selected Type:	Select One	• *
Property Address o	r Legal Description:	
4800 Falls of Neu	se Rd, Houston, TX, 77001	•
Select all parties th	at apply for the letter type selected:	
Party(s):	Lender Borrower Buyer Seller	*
	Back Next	Cancel

Please Note: edits to fields in the Title Resources – Online Services product will not be saved back to your ProForm Order.

Depending on the parties that apply to the letter type selected, you will be presented with the **Buyer/Borrower Information Screen** and/or **Seller Information Screen** and/or **Lender Information Screen**.

The **Buyer/Borrower Information** screen will allow the buyer information to be added. Click Submit to continue.

Buyer/Borrowe	r Information	R	TLE ESOURCI	ES®
Buyer Information:				
Bob P. Buyer		Fax:	(888) 555-1234	
1234 Connection S	reet	Email:	buyeremail@email.com	
Newport	TX 12345]		
		-	(r	_
		Fax: Email:		
Send to Borrowe	r Via Fax Send to I	Fax: Email: Borrower Via I		

Please Note: edits to fields in the Title Resources – Online Services product will not be saved back to your ProForm Order.

The **Seller Information** screen will allow the seller information to be added. Click Submit to continue.

Seller Information		LE SOUF	RCES
Seller Information: Sammy Seller 73 W. Flagler Street Miami FL 33130 Send to seller Via Fax Send to seller Via Email	Fax: (88 Email:	8) 555-5555	
	Back	Submit	Cancel

Please Note: edits to fields in the Title Resources – Online Services product will not be saved back to your ProForm Order.

The Lender Information screen will allow the lender information to be added. Click Submit to continue.

Title Resources - Letters - 2015110117	65	×
Lender Information		TLE ESOURCES
Selected Lender: Lender 1	Attn:	Bank of USA, NA
Chase Manhattan Bank, its successors and/	Fax:	(888) 555-5555
20E Greenway Plaza Houston TX 77046	Email:	david.proctor@softprocorp.com
Send to Lender Via Fax		
Send to Lender Via Email		
Lender Clause: Its successors and/or assigns as	their resp	ective interests may a
[Back	Next Cancel
	-	

Title Resources Guaranty Company will immediately return the letter. The Review Transaction screen allows you to view and accept the document(s).

	Revie	ew - 20	015070016	(Lund) on	-	
	Rev	view Le	etter	RE	LE SOU	RCES
	Doc	ument	5			
[v	/iew	Сору	Document Name	File Name	File Size	Transferred
	A		33BPL2015070016	33BPL2015070016.pdf	157750	100%
					Accep	t Close

You can Click the PDF Icon under the **View** column to view the Letter. Click **Accept** to add the document(s) back into the ProForm order.

When completed, the **Letter** will appear in the Title Services window as **Completed**.

Title	Services		(RE	ESO	URCES
Action	Product	Туре	Insured	Amount	Status	Created On
	Letters	Buyer/Purc	Bob Buyer		Completed	7/29/2015 10:22 AM
	udd Product					Frain Void 2

If you do not accept the document and close the review screen, you can review and accept the transaction later by clicking on the **Paper Icon** in the **Action** column on the Title Services screen.

Ordering Title Resources - Online Services Jackets

Policy Jackets may be ordered by clicking Add Product on the Title Services screen and then by clicking Jackets on the Available Products screen.



When Jackets is selected, the Jacket Selection screen will appear. Choose type of Jacket to be issued:

- Owner's Policy and Loan Policy
- Lender
- Owner
- Other

00116 - Jacket - 2015100116		
ion		
Select the Jacket to be Owner's Policy Lender First Loan Owner Other	e issued: y and Loan Policy ण	
(Back Next	Cancel
	0116 - Jacket - 2015100116 ion Select the Jacket to be © Owner's Policy © Lender First Loan © Owner © Other	• Jacket - 2015100116 ion Select the Jacket to be issued: • Owner's Policy and Loan Policy • Lender First Loan • Owner • Owner • Other

If you wish to order both an **Owner's Policy and Loan Policy** select the appropriate selection. You will be presented with options for ordering both Owner's Policies and Loan Policies.

If you wish to order a Loan Policy, select **Lender** Policy. You will be presented with options for ordering Loan Policies. Please note, your ProForm Order contain multiple loans, the dropdown will be enabled for you to select the loan relative to the policy allowing you to order the appropriate policy form.

If you wish to order an **Owner's** Policy select the appropriate selection. You will be presented with options for ordering Owner's Policies.

Should "Other" policies be available in your area, select **Other** Policy select the appropriate selection. You will be presented with options for ordering other policy forms.

Jacket Type Selection Screens

Select the Jacket Type from the "Loan Jacket Type Selection" or "Owner's Jacket Type Selection" window, depending on the Jacket chosen to be issued.

Owner's Jacket Type Selection screen will display available owner's policy jackets available. Please note this list of available jacket type will vary from jurisdiction to jurisdiction.



Loan Jacket Type Selection screen will display available loan policy jackets available. Please note the list of available jacket types will vary from jurisdiction to jurisdiction.

Title Resources - Jacket - 2015110118	
Loan Jacket Type Selection	TITLE RESOURCES
L - ALTA Loan Policy Policy of Title Insuran SFL - ALTA Short Form Residential Loan P SFL - ALTA Short Form Residential Loan P	nce 6/17/2006 (with Florida Modifications) olicy 6/16/2007 (FL mod)(Policy # Only) olicy 6/16/2007 (FL mod)(Must Complete Form)
	Back Next Cancel
	Back Close

Policy Information Screen

If you select a Jacket Type that requires additional information, you will be presented with the **Policy Information** screen. Fields present on this screen will be populated with information from your ProForm Order where available. You may edit the values for each field as you deem necessary.

Please Note: edits to fields in the Title Resources – Online Services product will not be saved back to your ProForm Order.

A red * will indicated that particular field is deemed **Required** in order to order that particular Jacket form. All required fields will need to be completed to activate the "**Submit**" button.

Policy Information	RESOURC	ES
SFL - ALTA Short Form Residential L	oan Policy 6/16/2007 (FL mod)(Must Complete For	m)
Name	Value	*
Agent File Number	2015110118	
Loan Number	1321546	E
Address Reference	73 W. Flagler Street, Miami, FL, 33130	
Street Address/Property Address	73 W. Flagler Street	
County and State	Miami.FL	
Amount of Insurance/Policy Amount	123,123.00	
Premium	5,889.00	
Mortgage Amount	1,325,546.00	
Mortgage Date	5	e
Date of Policy	10/08/2015	
Time of Policy		-
	Back Submit Ca	ncel

Please Note: edits to fields in the Title Resources – Online Services product will not be saved back to your ProForm Order.

Click **Submit** to send product order to Title Resources - Online Services.

A Progress Dialog will appear as the information is being sent to Title Resources - Online Services.

Title Resources - Jacket - 201	.5070016
Order Progress	RESOURCES
	м
	M
Sending data to Title Reso	ources
	Back Submit Cancel

The Review Jacket screen displays the Document Name and File Name with its file size and the percentage transferred. To view either document, click on the Adobe PDF option next to the Policy name. Or to copy either document to your clipboard, click on the button that looks like a document next to the Document Name.

Re	eview Ja	icket			TITLE	RCES
in and a set	ect All	🖹 Sele	ect None 🛛 🛄 Field Codes			
🔳 Gr	oups		📀 Data			
All			Name	Current Value	New Value	
Ov	vner's Po an Policy	licy	Owners's Policy Number		1113-0-2015110	118
20			Lender's Policy Number		1113-SFL-20151	10118
	ocumen View	ts	Dog meet Name	File Name	File Size	Transformed
	View	ts Copy	Document Name 1113-0-2015110118	File Name	File Size	Transferred
	View	ts Copy	Document Name 1113-0-2015110118 1113-SFL-2015110118	File Name 1113-O-2015110118.pdf 1113-SFL-2015110118.pdf	File Size 197889 76275	Transferred 100% 100%

Policy Review Screen

The accepted jacket number(s) will be available within the ProForm order in the Policy Number field(s) To finish, click Accept. The Order Progress pop-up should come back stating "Sending Data to ProForm". Once completed, the product will appear in your Title Services screen, showing the completed service.

			8
Acti	F	ESOU	RCES
Busy	X	<u></u>	
		New Value	
Sanding data to BroEarm		33-81143-20150	70016 🔯
Serung data to nor omit			
9			
View Copy Document Name	File Name	File Size	Transferred
👿 🔎 📄 33-81143-2015070016	33-81143-2015070016.pdf	160453	100%
0		-	
6		O Accep	t Close

When completed, the product will appear in the Title Services window as Completed.

Title	Services			RE	SO	JRCES
Action	Product	Туре	Insured	Amount	Status	Created On
	Letters	Closing Pr	Chase Manhattan Bank		Completed	11/2/2015 10:48 PM
	Jacket	Loan	Chase Manhattan Mortga	123,123	Completed	11/2/2015 11:18 PM
	Jacket	Owner			Completed	11/2/2015 11:18 PM
	dd Product)					
	dd Product					Editt Void 🖉

Letter and Jacket Document Transfer to ProForm Order

The document(s) will be available to all Standard and Enterprise users from within the ProForm order via the SPImage icon located on the ProForm Menu bar (a SPImage license is not required to access SPImage. SPImage will become unlocked for the order once a document is Accepted into the order via SoftPro 360).



For Select users, the document(s) will be available by clicking on the Attachments & Document History link located in the documents tab.

Conter History Conter H	
🖤 🖉 🖉 Order History 🖉 🖓 Overlay 🖉	nplate
	order
ster Checklist Tasks Requested Tasks Notes Documents Attachments alle Rename (Submit Order
Quick Links Documents Actions	Workflow

Editing Title Resources - Online Services Products

If the Product information needs to be edited, highlight the product to be edited and click Edit/Void. The Product Information screen will appear and will contain a read only list of the product information. Select Edit again to change the information displayed.



When Edit is selected, the screens for Jackets or CPLs (depends on the product type being edited) will be displayed with the current product information. Once editing is complete, the product will be updated and will be available in the list of products ordered.

Voiding Title Resources - Online Services Products

If the Product information needs to be voided, highlight the product to be voided and click Edit/Void. The Product Information screen will appear and will contain a read only list of the product information.



If you choose Void, a pop-up screen stating "Are you sure wanted to void policy?" will appear.

🥹 Title Resou	xces - 2015070016	5
Product		
Transaction I Policy Nume Agent Name Policy Name	Number: 410060-10-150729-031527 #: 33-81143-2015070016 DHI TILE OF CENTRAL TEXAS - TX : 81143 - TX Owner's Policy (T-1) 2/1/2010 SoftPro 360 Image: Comparison of the state of the	M M M
	Void Edit Close	
	Back	se

If "Yes" is selected, the Cancel Progress window will pop-up, sending data to Title Resources - Online Services.

т	Title Resources - Jacket - 2015	15070016
Acti	Cancel Progress	RESOURCES P
		M
	Sending data to Title Reso	M M M
0		Back Next Cancel
_		Back

When completed, the product will appear in the Title Services window as Canceled.

