

TitleLogix User Guide

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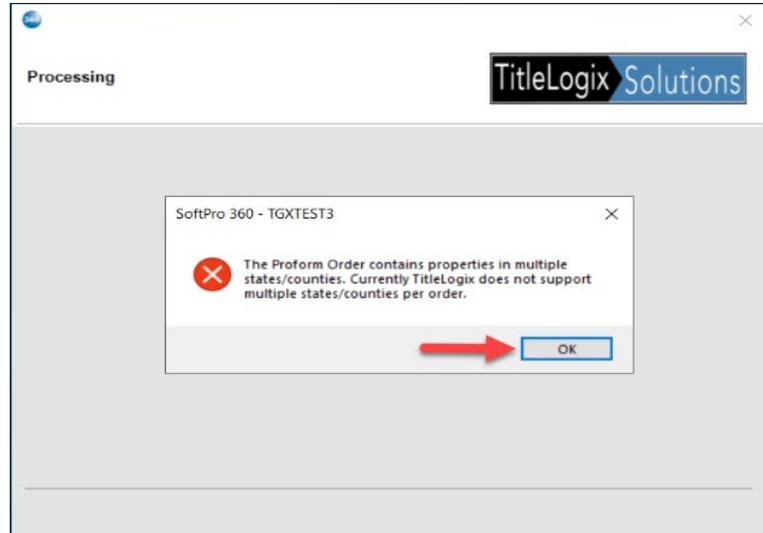
Introduction

TitleLogix provides statewide production in Texas of Tax Certificates and HOA Certificates for Title Companies and Agents.

Accessing

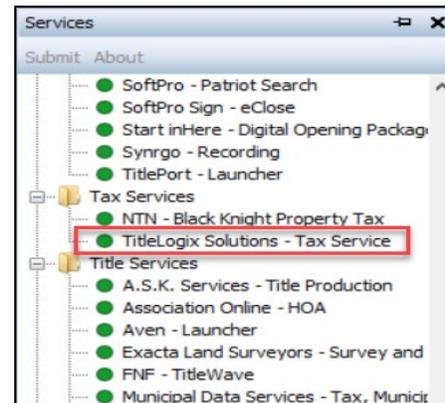
Prior to accessing the TitleLogix Solutions integrations, if multiple properties exist in the order, verify all properties are in the same county.

If multiple properties in different counties are present in the ProForm order, the integration displays an error message citing TitleLogix does not support multiple states/counties per order.



From the ProForm toolbar,

1. Select the **Services** tab
2. Click the **Tax Services** folder to expand
3. Double-click the **TitleLogix Solutions – Tax Services** entry



The **Order Linking** screen displays to connect the integration.

1. Link an order
 - a. If no order is open, enter the corresponding order in the **Selected Order Number** field
 - b. If an order is open, the Integration populates the **Open Order Numbers** with the active order and automatically links to the order for you
2. Click the **OK** button to continue

To see more information about TitleLogix Solutions, highlight **TitleLogix Solutions – Tax Service** and click **About**.

Click **OK** to exit the **About** screen.

Once a ProForm Order is linked, the **Welcome** screen displays.

1. You can check the **Skip Welcome Page** check box to skip having the **Welcome** screen display each time you log into the integration.
2. Click the **Next** button to continue or **Cancel** to exit the integration.

Logging into TitleLogix Solutions

- The **Login** screen requires a valid username and password be entered.
- Check the **Remember Me** check box to login automatically when launching the integration in future sessions.
- Click the
 - » **Login** button to continue
 - » **Back** to return to the **Welcome** screen
 - » **Cancel** to exit the integration

Customer Page

Upon successfully logging into the integration, users are directed to the **Customer Page** screen. On this screen, users have the option to select the customer they are placing an order for, as well as the corresponding branch for that customer.

- Single customer / single branch - The customer and branch entries are defaulted.
- Multi-customer / multi-branch – The user selects the customer and branch from the respective drop-down.

Click the **Next** button to continue.

Ordering Products

The **Review / Product Selection** screen,

- Populates the Property(s) from the ProForm order.
- Click the **Order Information** link to view Property(s) and Parties entered in the ProForm order.
- Select the desired Products,
 - **Tax Certificate**
 - **HOA Full**
 - **HOA Contact**
- Enter **Special Instructions** as needed
- Check the **RUSH** check box as needed
- **Estimated Closing Date** pulls from the ProForm Order but can be overwritten
- Click the **Add Documents** button to add documents to the order

TitleLogix Solutions - TGX11.13.2023

Review / Product Selection

Property(s):

Property Address	City County State Zip
1807 Danciff Dr	Dallas, Dallas, TX 75224
5342 Whispering Oaks Dr	Dallas, Dallas, TX 75236

Select the desired products for all properties:

<input checked="" type="checkbox"/>	Products
<input checked="" type="checkbox"/>	Tax Certificate
<input checked="" type="checkbox"/>	HOA Full
<input checked="" type="checkbox"/>	HOA Contact

Special Instructions:

RUSH Estimated Closing Date: 01/25/2024 12:00:00

Viewing Order Information

Click the **Order Information** link to view the properties and parties that will be sent with your order. If multiple properties exist in the ProForm order, the information can be accessed via the **Property** drop-down.

Click the **Close** button to return to the **Review / Product Selection** screen.

TitleLogix Solutions - TGXTEST1

Order Information

The following information will be sent with your order:

Property: 123 Main Street, Dallas, Dallas, TX, 75001

Item	Information to be Sent
County *	Dallas
State *	TX
Parcel Number	
Legal Description	

Parties:

Type	Name	Email
Buyer	Bobby Ewing	
Seller	J R Ewing	

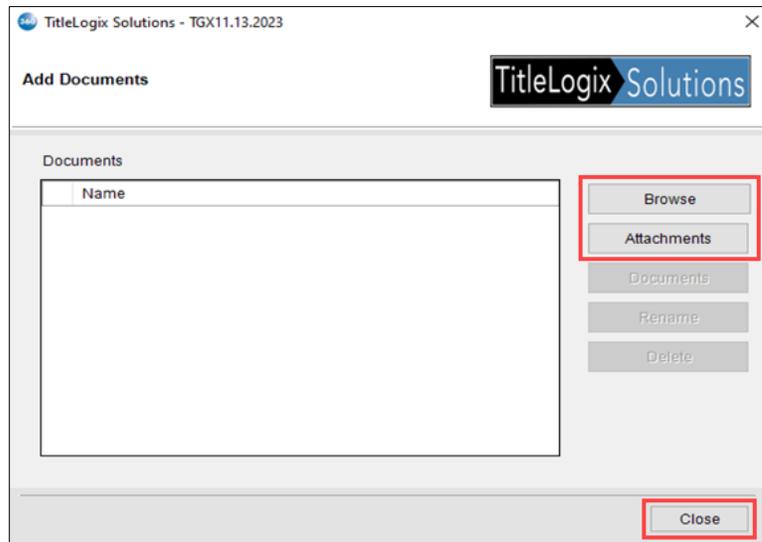
Adding Documents

Clicking the **Add Documents** button to select documents to be included in the submission.

- **Browse** - The ability to browse to a location on a local computer or network to add a document.
- **Attachments** - The ability to attach a document from SmartView.

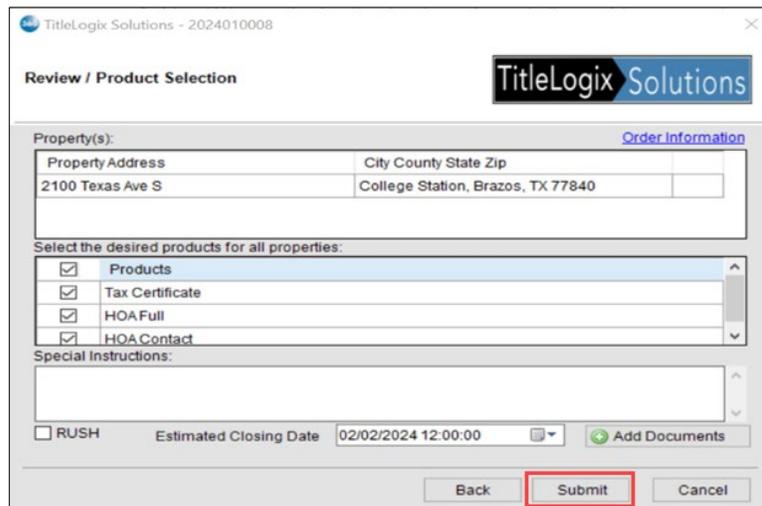
Once a document has been added, additional features are enabled.

- **Rename** - The ability to rename an added document.
- **Delete** - The ability to delete an added document.

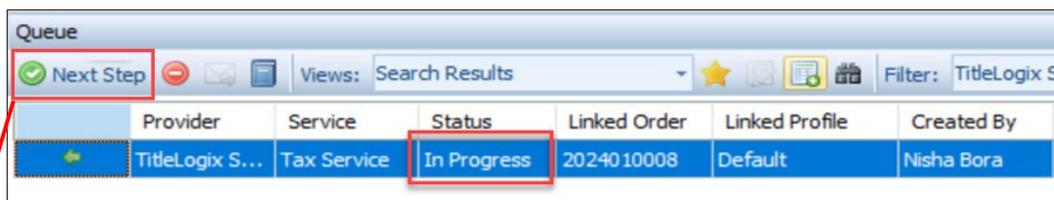


Click the **Close** button once all documents have been added.

From the **Review / Product Selection** screen you can click the **Submit** button to send the order to TitleLogix Solutions.



Once the order is submitted, the transaction is displayed in the **360 Queue** with a **Status** of **In Progress**.

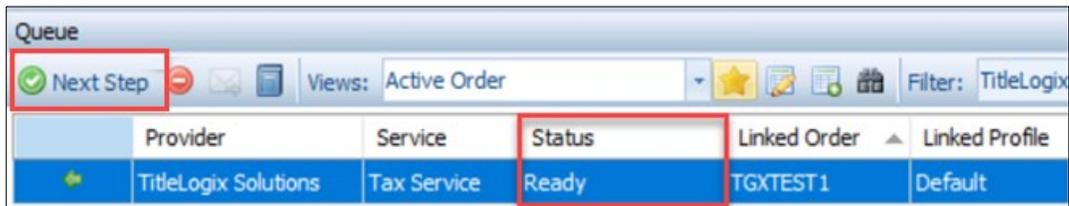


The **Next Step** button is enabled allowing users to edit/update attached documents from the **Add Documents** screen.

Receiving Products from TitleLogix Solutions

When a product is sent back from TitleLogix Solutions, the status updates to **Ready** in the **360 Queue**.

****NOTE** All products ordered may not be sent at the same time.**



Click the **Next Steps** button to open the **Review** screen. The **Review** screen displays the data and documents received for import from TitleLogix.

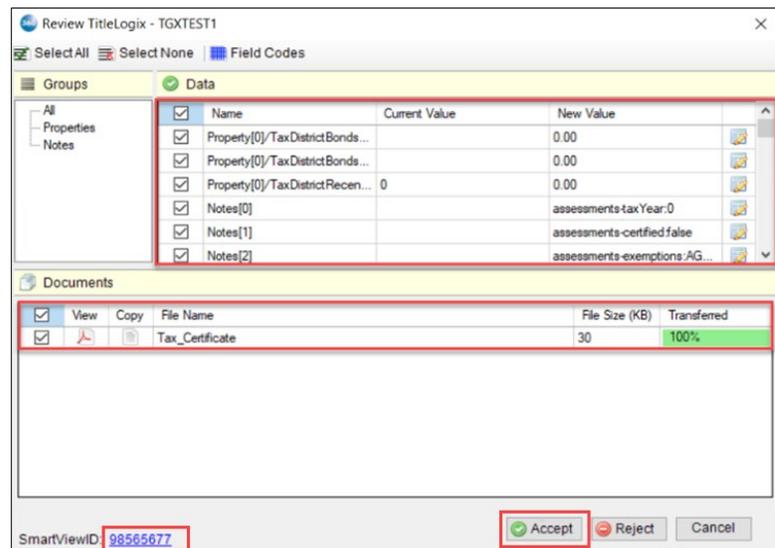
In our example, only the Tax Certificate has been received and the HOA Certificate will be sent in a subsequent remit.

Documents are saved to the,

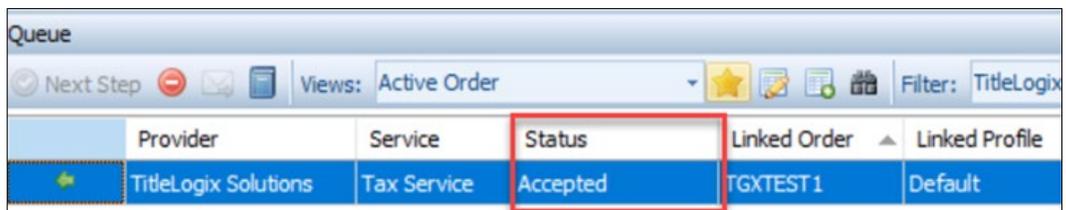
- **Attachments** of the ProForm order for non-smartview customers
- Smartview folder selected for smartview customers

The **SmartViewID** shows the folder where documents will

be stored. If none is shown, click the **SmartViewID** link to select the corresponding folder. The **SmartViewID** is only shown when the tool is configured for smartview.



Click the **Accept** button. The **360 Queue** updates the **Status** of the transaction to **Accepted**.

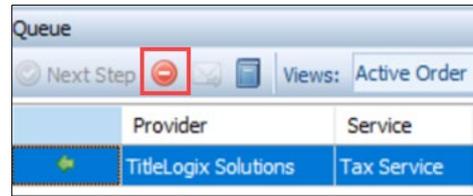


When additional products are sent from TitleLogix under the same request, the **Status** is updated yet again to **Ready**. Follow the process cited above to accept the additional data and/or documents.

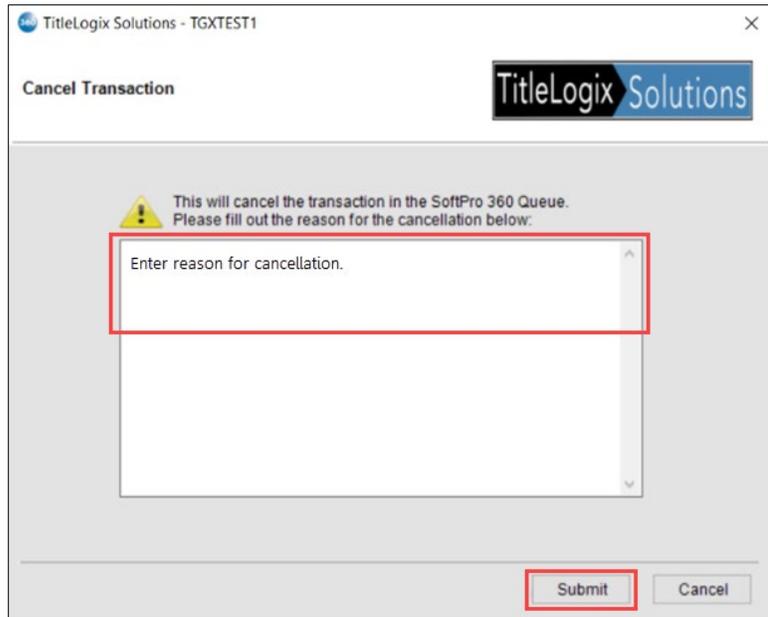
Canceling a Transaction

To cancel a transaction, highlight the transaction in the **360**

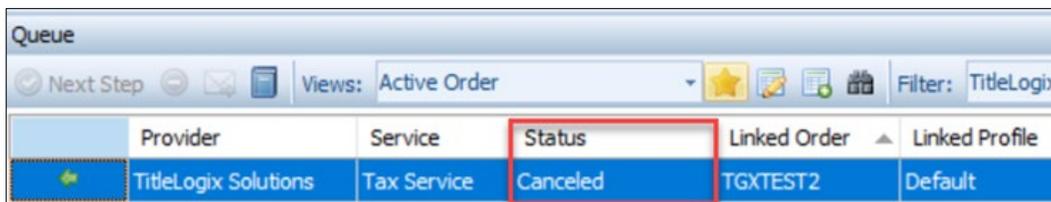
Queue and click the **Cancel**  icon.



When prompted, enter the reason for the cancellation and click the **Submit** button.

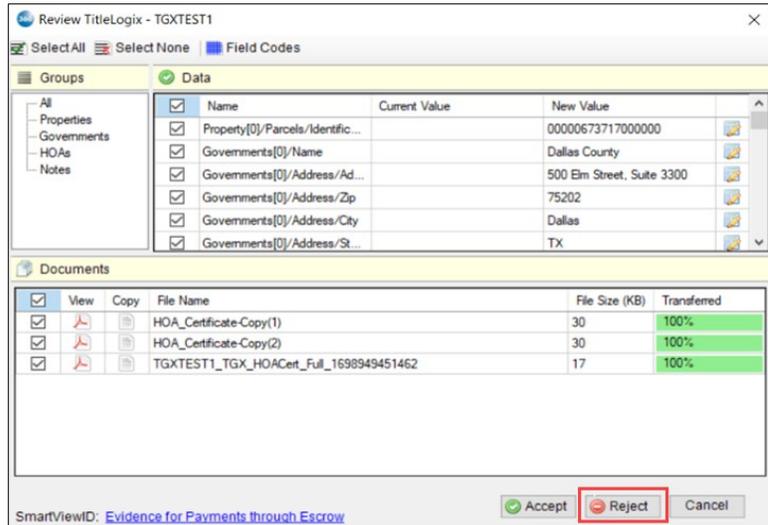


The **360 Queue** updates the **Status** of the transaction to **Canceled**.

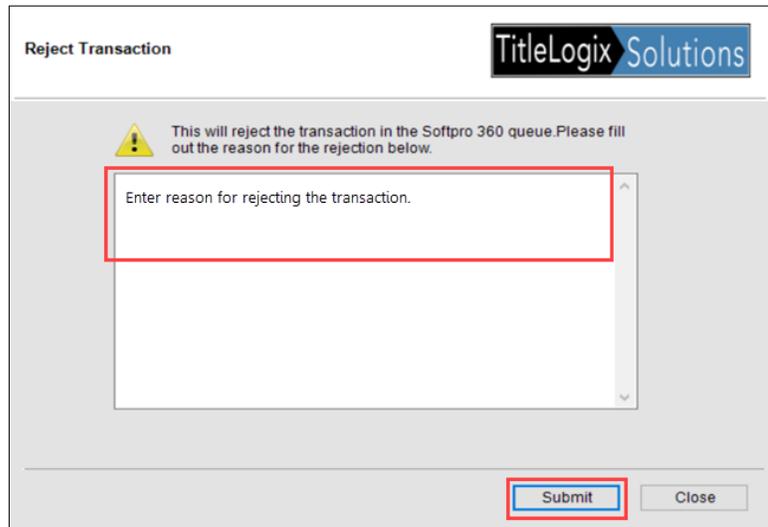


Rejecting a Transaction

To reject a transaction, click the **Reject** button on the **Review** screen.



When prompted, enter the reason for the rejecting the transaction and click the **Submit** button.



The **360 Queue** updates the **Status** of the transaction to **Rejected**.

