

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

Order Linking	×
Open Order Numbers:	
Selected Order Number:	
OK Ca	ncel

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.

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

Solutions - XOMTR-20-2021	×
Welcome	TitleLogix Solutions
<u>TitleLogix Solutions</u> , LLC has been formed for the purpose of art technology solutions to the title insurance industry.	creating and delivering state-of-the-
Utilizing Software as a Service (SaaS), TitleLogix has reimagir TitleLogix will deliver lower cost and time sensitive solutions to improved quality and title production efficiencies.	ned the title insurance workplace. age old problems that will result in
Led by Max Harris, TitleLogix Solutions is now open for busine information about our products and services and how our Saa business to compete and win in today's dynamic marketplace.	ess. We will soon be releasing more S technologies can arm your
Skip Welcome Page	Next Cancel

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

Please provide your credentials User Name: SoftproTestingUser Password: Remember Me	Login			Tit	
Please provide your credentials User Name: SoftproTestingUser Password: ************************************					olution
Please provide your credentials User Name: SoftproTestingUser Password: ************************************					
Please provide your credentials User Name: SoftproTestingUser Password: ************************************					
Please provide your credentials User Name: SoftproTestingUser Password: ************************************					
User Name: SoftproTestingUser Password: ************************************		P	lease provide your crede	entials	
Password:		User Name:	SoftproTestingUser		
Remember Me		Password:			
		(Remember Me		
Bud Look Borney				Paret	 C. Consult

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 / multibranch – The user selects the customer and branch from the respective drop-down.

Click the Next button to continue.

Customer Pag	ge	TitleLogix Solu	tion
	Please select a customer	~	
	Please select a branch		
	Default Branch	~	

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 •

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** dropdown.

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

ler Information			TitleLogix	Solution
The following info	ormation will be sent with	your order:		
Property: 123 Ma	ain Street, Dallas, Dallas,	TX, 75001		~
Item		Informatio	n to be Sent	^
County *		Dallas		
State *		TX		
Parcel Number				
Legal Descriptio	n			~
Parties:				
Туре	Name		Email	
Buyer	Bobby Ewing			
Seller	J R Ewing			

🥯 TitleLogix Solutions - TGX11.13.2023		×
Review / Product Selection	TitleLogix So	lutions
Property(s):	Orde	r Information
Property Address	City County State Zip	
1807 Dancliff Dr	Dallas, Dallas, TX 75224	
5342 Whispering Oaks Dr	Dallas. Dallas, TX 75236	
Select the desired products for all properties:		
Products		^^
HOA Contact		~
Special Instructions:		
RUSH Estimated Closing Date 0	1/25/2024 12:00:00	ocuments
	Back Submit	Cancel

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.

	TheLogix Solution
ocuments	
Name	Browse
	Attachments
	Documents
	Rename
	Delete

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.

ranart	(a)	Order Inform	atio
Prope	(s). tv Address	City County State Zip	ano
2100 T	exas Ave S	College Station, Brazos, TX 77840	1
\square	Products		Ĥ
NN	Products Tax Certificate HOA Full		Î
NNN	Products Tax Certificate HOA Full HOA Contact		
S S pecial	Products Tax Certificate HOA Full HOA Contact nstructions:		
9 9 9 9 9 9 9 9 9 9 9 9 9 9 9 9 9 9 9	Products Tax Certificate HOA Full HOA Contact nstructions:		
V V Pecial	Products Tax Certificate HOA Full HOA Contact Instructions:		

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

Vivext	t Step		views: 5	earch Results	· · · · · · · · ·		Filter: Intelogo
	P	rovider	Service	Status	Linked Order	Linked Profile	Created By
	Tit	tleLogix S	Tax Service	In Progress	2024010008	Default	Nisha Bora

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.

Queue					
🖉 Next St	tep 🥥 🖂 🗐 View:	s: Active Order		🚖 🛃 🗟 📾	Filter: TitleLogix
	Provider	Service	Status	Linked Order 🔺	Linked Profile
٠	TitleLogix Solutions	Tax Service	Ready	TGXTEST1	Default

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

All Name Propertys Notes Property[0]/TaxDistr Property[0]/TaxDistr	Current Value ictBonds	New Value 0.00		2	í
Properties Property[0]/TaxDistr Notes Property[0]/TaxDistr	ictBonds	0.00		Ì	
Property[0]/TaxDistr	ictBonds	0.00			
Dennet 101 (Ten Dista		0.00			
Property[u]/ TaxDistr	ictRecen 0	0.00		ø	
Notes[0]		assessments-tax Yea	ar:0	2	
Notes[1]		assessments-certifie	dfalse	ø	
Notes[2]		assessments-exemp	tions:AG	2	
View Copy File Name		File Size (KB)	Transferred		
Tax_Certificate		30	100%		

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.

Queue							
🔘 Next Sta	ep 🥥 🖂 🗐 Views	: Active Order	-	2 🗟 📾	Filter: TitleLogix		
	Provider	Service	Status	Linked Order 🔺	Linked Profile		
ج	TitleLogix Solutions	Tax Service	Accepted	TGXTEST1	Default		

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 Queue and click the Cancel icon. Next Step Views: Active Order Provider Service TitleLogix Solutions Tax Service When prompted, enter the reason TitleLogix Solutions - TGXTEST1 \times for the cancellation and click the TitleLogix Solutions **Cancel Transaction** Submit button. This will cancel the transaction in the SoftPro 360 Queue. Please fill out the reason for the cancellation below: Enter reason for cancellation. Submit Cancel

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

Queue								
O Next	Step 🔘 🖂 🗐 View	vs: Active Order	r	- 🚖 🛃 💼	Filter: TitleLogix			
	Provider	Service	Status	Linked Order 🔺	Linked Profile			
\$	TitleLogix Solutions	Tax Service	Canceled	TGXTEST2	Default			

Rejecting a Transaction

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

	oups		O Da	ata					
– All – Properties – Governments – HOAs			Name	Current Value	Ne	w Value			
			Property[0]/Parcels/Identific		000	0067371700000	0		
				Governments[0]/Name		Dal	as County		
Not	es			Governments[0]/Address/Ad		500	Elm Street, Suite	e 3300	1
				Governments[0]/Address/Zip		752	02		
				Governments[0]/Address/City		Dal	as		1
				Governments[0]/Address/St		TX			2
	View	Сору	File Na	me			File Size (KB)	Transferre	d
\square	A		HOA_C	ertificate-Copy(1)			30	100%	
\square	A		HOA_C	ertificate-Copy(2)			30	100%	
	ト		TGXTEST1_TGX_HOACert_Full_1698949451462		17	100%			

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

Reject Trar	sactio	TitleLogi	x Solutions
		This will reject the transaction in the Softpro 360 queue.Please out the reason for the rejection below.	e fill
	Enter	reason for rejecting the transaction.	^
			v
		Submit	Close

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

Queue							
🛇 Next Ste	🛇 Next Step 💿 🖂 📋 Views: Active Order 🔹 📩 👘 Filter: TitleLog						
	Provider	Service	Status	Linked Order 🔺	Linked Profile		
*	TitleLogix Solutions	Tax Service	Rejected	TGXTEST2	Default		