

Title Data, Inc User Guide

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History

Date	Details
4/2022	Initial Release
4/2023	Updated to include Agency use

Introduction

Title Data, Inc., is the third largest maintainer of traditional, thick title plants in the United States, covering approximately 21 million Texas properties.

This integration consists of two parts, auto-ordering the run sheet and publishing starters back into the Title Data repository. Both processes will be handled via automation, with users not required to take any special actions to order run sheets or publish documents back to the Title Data, Inc., repository.

Automated Run Sheets

The first time an order is saved and meets certain criteria (All transaction types, Street Address (Number, Name, City, State, County, Zip) and/or Parcel ID and/or Legal Description, and a Seller or Buyer/Borrower First and Last Name) automation will trigger to order the run sheet. The run sheet will be returned by Title Data, Inc., and accept automation will trigger to upload the run sheet to the Attachments folder in the SoftPro Select order.

Automated Starter Upload

When certain document types are published from an order (Commitment, Loan Policy, Owners Policy, Short Form Policy), automation will trigger to upload the document to the Title Data, Inc., repository. If a single document is published, it will retain its name, i.e., Commitment. If multiple documents are merged before being published, the Documents package will be renamed to Documents (Doc Type) before being uploaded. For example, a merged document package containing a Commitment and an Invoice would be renamed to Documents (Commitment), since the Commitment is the qualifying document.

Manual Run Sheets

Run sheets can be ordered outside of the automated process by following the steps outlined below.

From the ProForm toolbar

Select the Services tab

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\bigcirc	ProForm	Pro	Trust ProDe	esign	Pro 1099	SPImage	SP	Admin	360	Order	
360 Queue	O Services	Q Search	20 Administration	Login	Logout	(C) Information	C Help	O About	Publish	Q Website	

Scroll to the Title Services folder

Double-click Title Data, Inc. – Process Starters



If there is not an open order in Select, the Order Linking pop up will appear. An order number can be entered in the Selected Order Number field and will open when the user clicks **OK**

Order Linking	×
Open Order Numbers:	
Selected Order Number:	
OK Cance	:1

Once the order is open, the Select Service screen will open. Property Details will be pre-populated from the Select Order. Click Request Auto Order to begin.

itle Data, Inc Process Starters - 20220	40067	
elect Service		TDI TITLE DA Excellence by Desig
Presente Data la		
Property		County Name
510 Monte Vista Drive, Dallas, TX, 75223	}	Dallas
Service Details		
Admin Screen	Request Auto Order	Upload Starters
Maintain Configuration	Order Run Sheet	Commitment/Policy Upload
Maintain Configuration	Order Run Sheet	Commitment/Policy Upload
Maintain Configuration	Order Run Sheet	Commitment/Policy Upload

At least one Buyer or Seller must be selected on the Select Parties and Submit Auto Order Screen. If not, an asterisk will appear and the Submit button will be greyed out.

۱ 🌑 ۱ S	fitle Da elect	ata, Inc Process Star	ters - 2022040067 nit Auto Order			× TLE DATA ellence by Design
	Partie	s to the transaction Contact Code	: (B-Buyer, S-Seller) 🔆 1 First Na	me	Last Name	
		S	Samuel		Seller	
					Sobmit	Cancel

Once a Buyer or Seller (Or both) is selected, click **Submit** to submit the auto order request.

elect	ata, Inc Process Star	ters - 2022040067 mit Auto Order		DA v Desig
Partie	s to the transaction	: (B-Buyer, S-Seller)		
	Contact Code	First Name	Last Name	-
	B	Robert	Buyer	

With the Select order still open, navigate to the 360 Queue. The **Active Order** view will show the transaction with a status of **In Progress**. The **Next Step** button is greyed out. Queue

Queue

Queue					
🕗 Next St	tep 🔘 🖂 🖡	Views: Active Order	*	襘 🛃 🗟 🃸	Filter: All Provide
	Provider	Service	Status	Linked Order 🔍 👻	Linked Profile
	Title Data,	Process Starters	In Progress	TDIBeta4	Default

When the run sheet has been returned, the status will change to **Ready**. Click **Next Step** to go to the **Review Screen**

The **Review Screen** shows the document being returned. To view the document, click the PDF icon under the View Column. Once ready, click **Accept** to import the run sheet to the **Attachments** screen.

📀 Next Ste	ep 🚽 🗐 🚺	Views: Active Order	×	🚖 🛃 🖏	Filter: All Provider
	Provider	Service	Status	Linked Order 🔍 👻	Linked Profile
\$	Title Data,	Process Starters	Ready	TDIBeta4	Default

SelectAll ≥ SelectNone Documents ✓ Vew Copy File Name File Size (KB) Transferred ✓ Pun Sheet 127 100%	Γ	🚳 Rev	view TDI	- TDIB	eta3						×
Documents Vew Copy Fie Name Fie Size (KB) Transferred Transferred To Run Sheet 127 100%	5	≩ Sele	ct All 🗏	🖹 Selec	t None						
Vew Copy File Name File Size (KB) Transferred		🔔 Do	cument	s							
Image: Run Sheet 127 100%			View	Сору	File Name				File Size (KB)	Transferred	
	I		F		Run Sheet			1	27	100%	
Cancel Cancel								 -	Accept	Cancel	

The document is now in the **Attachments** screen In the SoftPro Select order.



The 360 transaction is now completed in the queue



Manual Starter Upload

The process to manually upload starters to the Title Data repository is as follows:

From the Select Service screen, choose Upload Starters



On the **Documents** screen, click **Browse** to choose a document from the local machine or **Attachments** to upload a document from the SoftPro Select **Attachments** screen. Until a document is chosen, the Submit button will remain greyed out.

Title Data, Inc Process Starters - TDIBeta3			×
Documents			E DATA ce by Design
Documents			
Name	Туре	Brow	se
		Attachm	ients
		Docum	ents
		Rena	me
		Dele	te *
Upload your Commitment, Owner Polic Click on Submit when finished.	y, and Loan Policy on this screen.		
		Submit	Cancel

Once a document in chosen, select the **Type** from the drop-down menu. The Submit button will remain greyed out until a **Type** is chosen.

Documents		_
Name	Туре	Browse
Commitment_Example.pdf	-Select-	Attachments
_	Commitment Owner's Policy	Documents
	Loan Policy Short Form	Rename
	Short Politi	Delete

Up to three (3) documents can be uploaded at once. A fourth document upload attempt will trigger an error message.



Once the documents are chosen and Types are selected, click **Submit** to upload the documents.

Туре		
Туре		
		Browse
Commitment Owner's Policy	~ ~	Attachments
Loan Policy	~	Documents
		Rename
		Delete
	Owner's Policy	Owner's Policy 💛

The Order Progress screen will show the progress of the upload.

Title Data, Inc Process Starters - 2022070086	×
Order Progress	TDI TITLE DATA Excellence by Design
Sending order data to Title Data, Inc	

When the upload completes, the transaction in the 360 queue will show as "Completed". The process is complete.

Queue					
🖉 Next Ste	ep 🛛 🖂 🚺	Views: Active Order	•	🚖 📝 🔒 🏙	Filter: All Provider
	Provider	Service	Status	Linked Order 🔍	Linked Profile
. 🔶	Title Data,	Process Starters	Completed	TDIBeta3	Default

Adding New Profiles, TDI Codes and Counties

Note: Any time a new county, company code or profile is added, automation will need to be updated to incorporate the new information.

To add new profiles and/or counties, access the Admin Screen (Maintain Configuration) from the Select Service screen.

		Excellence by Desig
Property Details		
Property		County Name
6647 Aintree Circle, Dallas, TX, 75214		Dallas
ervice Details		
Admin Screen	Request Auto Order	Upload Starters
Service Details	Research State Order	

On the Counties tab, fill in the county name in the text box and click Add County. The application will indicate if the county already exists.

🚭 Title Data, Inc Process Starters - TDI	×
Admin Configuration Page	TITLE DATA Excellence by Design
Counties TDICodes Profiles AdminUsers	
Add County Dallas	
Delete County Name	
Bell Bell	
	Close
	Close

A message will indicate that the new county was added successfully



The new county will now show in the Add County tab

 Title Data, Inc Process Starters - TDI Admin Configuration Page 	X TITLE DATA Excellence by Design
Counties TDICodes Profiles AdminUsers	
Delete County Name	
1 Bell	
Dallas Dallas	
L	
	Close

To add a new TDI Company Code, click on the **TDICodes** tab, then click the **Add TDI Code** button.

🏐 Title Dat	a, Inc Process	Starters - TDI			×
Admin Co	onfiguratio	n Page		TDI TITLE D Excellence by D	ATA esign
Counties	TDICodes	Profiles AdminU	sers		
Add 1	DI Code	_			
View	Delete	TDI Code	Description		
_					
				Clo	se

Fill out the TDI Code, Description and Credentials, then click **Save**.

🥯 Add TDI Code		×
TDI Code:	Description Alamo Title	
SFTP Credentials		
Auto Order Username		
X0000000X		
Auto Order Password		

Upload Starters Username	2	
X0000000X		
Upload Starters Password		
•••••		
	Save Close	

A message will indicate the TDI code was added successfully



The new TDI code will now show in the TDICodes tab

😂 Tit	tle Data,	Inc Process	Starters - TDI			×
Adr	nin Cor	nfiguration	n Page		TITLE DA	TA gn
Co	unties	TDICodes	Profiles AdminUs	ers		
	Add TD	I Code				
	View	Delete	TDI Code	Description		
			AM	Alamo Title		
	2	T	JM	FNF Lawyers Title of Amarillo		
					Close	
					Close	

To add a new profile, click on the **Profiles** tab, select the TDI codes that will be associated with the profile, add the profile name in the text box and click **Add Profile**.

Note Multiple profiles can be associated with each TDI Code, but only one TDI code can be associated with each profile

Title Data, Inc Process Starters - TDI	×
Admin Configuration Page	TITLE DATA Excellence by Design
Counties TDICodes Profiles AdminUsers	Profile Name DefaultP\TXXAMA CPFILT\ESC\051
Delete TDI Code Profile Name	
	Close

A message will indicate the profile was added successfully



The new profile and the associated TDI code will now show in the Profiles tab

dmin Configuration Pag	rs - TDI	TDI TITLE DA Excellence by Desig
Counties TDICodes Prof	Select> v * Profile Name:	*
Delete TDI Code	Profile Name Default/P\TXIAMA CPF\LT\ESC\0514 Main	