

United Tax Services User Guide

February 2024

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History

Date	Details
02/14/2024	Initial Draft

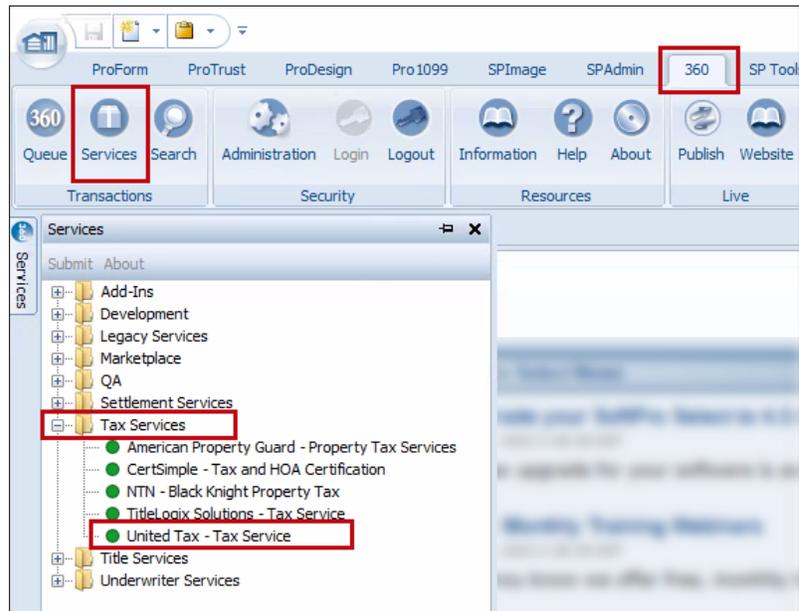
Introduction

The United Tax Services integration streamlines the tax ordering process for SoftPro 360 users. By integrating with 360, the users will have the ability to request tax information and obtain tax and HOA certs from United Tax Services.

Accessing United Tax Services

From the toolbar:

- Select the **Services** tab
- Double-click the **Tax Services** folder to expand
- Double-click **United Tax – Tax Service**



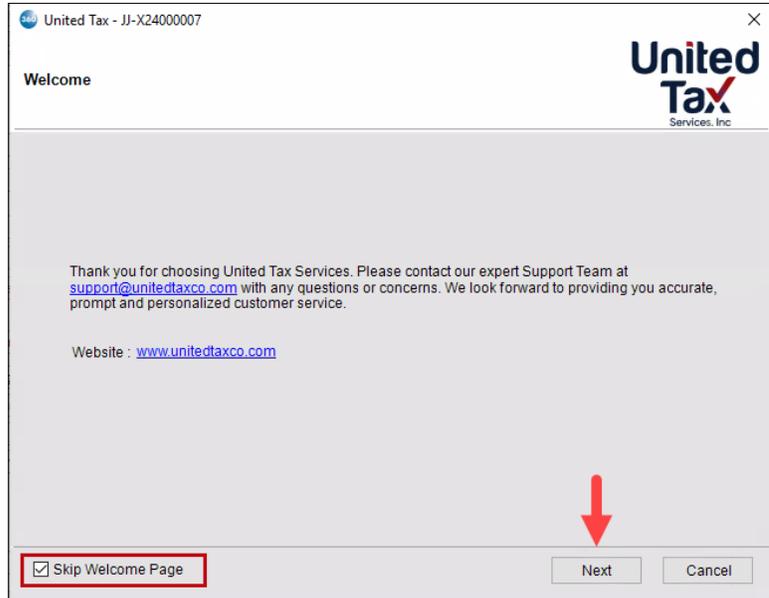
To see more information about United Tax Services, click the **United Tax – Tax Service** link.

Click **OK** to exit the **Service Information** screen.



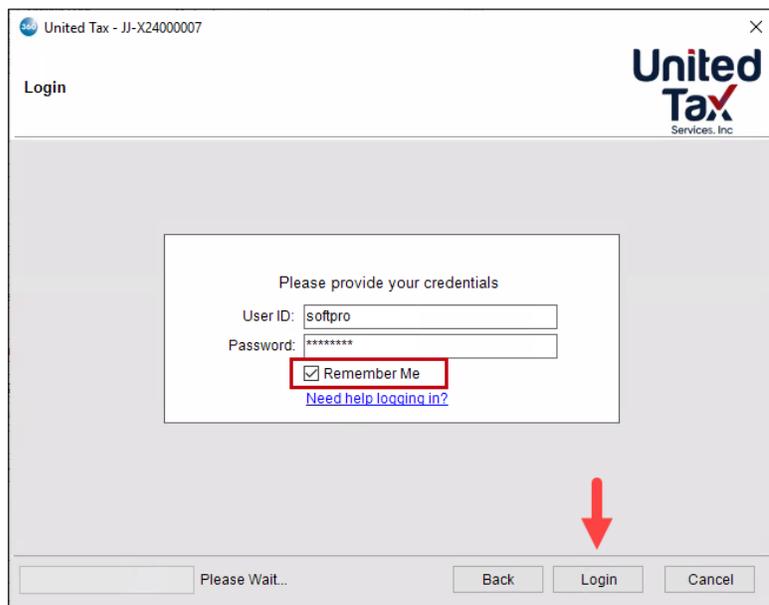
The **Welcome** screen displays.

- 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.



Logging into United Tax Service

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



Ordering Products

The **Review/Product Selection** screen shows **Property(s)**, **Products** and **Special Instructions**. There is also a check box for **RUSH** orders.

A tax product must be selected to activate the **HOA/NTP Products** selection and the **Submit** button.

United Tax - UnitedTax25

Review / Product Selection

Property(s)

Property Address	City State Zip
123 Main Street	Dallas, TX, 75001

Select the desired products for all properties :

Tax/Other Products: --Select-- *
 HOA/NTP Products: --Select-- *
 Special Instructions:

Estimated Closing Date:
 Rush
 Add to Proform Notes

Back Submit Cancel

Click the **Order Information** link to open the **Order Information** screen.

This shows Property and Party information. If multiple properties exist in the ProForm order, they can be accessed via the **Property** drop-down.

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

United Tax - UnitedTax25

Review / Product Selection

Property(s)

Property Address	City State Zip
123 Main Street	Dallas, TX, 75001

Order Information

The following information will be sent with your order

Property: 123 Main Street, Dallas, TX 75001

Item	Information to be sent
County	Dallas
Parcel Number	123-45-678
Legal Description	Lot 1, Block 2, Big Texas Subdivision

Parties:

Type	Name
Buyer	Buyerson, Robert

Closing Agent Name: Emily Escrow
 Closing Agent Email: emily@yahoo.net

Close

Click **Submit** to send the order to United Tax Services

The screenshot shows a software window titled 'United Tax - UnitedTax25' with a sub-header 'Review / Product Selection'. It contains a table for 'Property(s)' with columns for 'Property Address' and 'City State Zip'. Below this are dropdown menus for 'Tax/Other Products' (set to 'Tax Certificate'), 'HOA/NTP Products' (set to '--Select--'), and 'Estimated Closing Date' (set to '12/28/2023'). There are also checkboxes for 'Rush' and 'Add to Proform Notes'. At the bottom, there are 'Back', 'Submit', and 'Cancel' buttons. A red arrow points to the 'Submit' button.

Receiving Products from United Tax Services

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

Provider	Service	Status	Linked Order
United Tax	Tax Service	In Progress	UnitedTax25

When a product is sent back from United Tax Services, the status updates to **Ready**. Click **Next Step** to review the information returned.

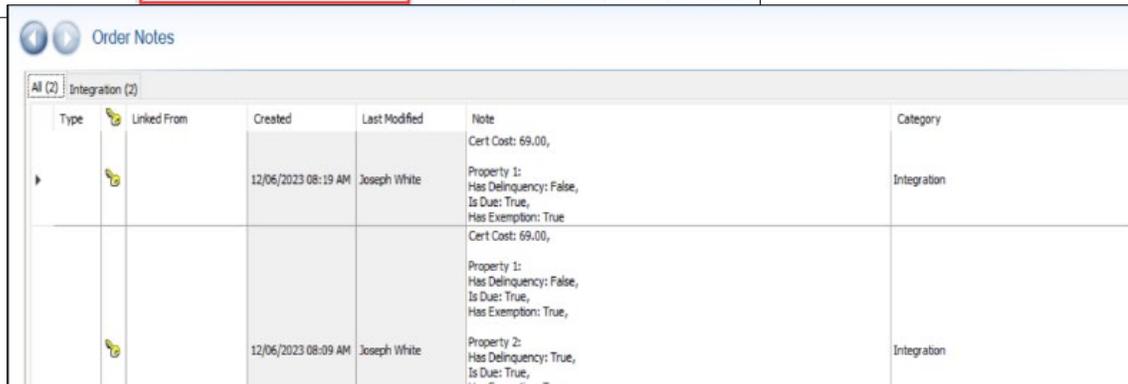
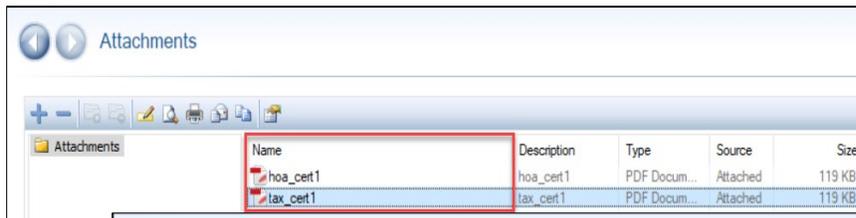
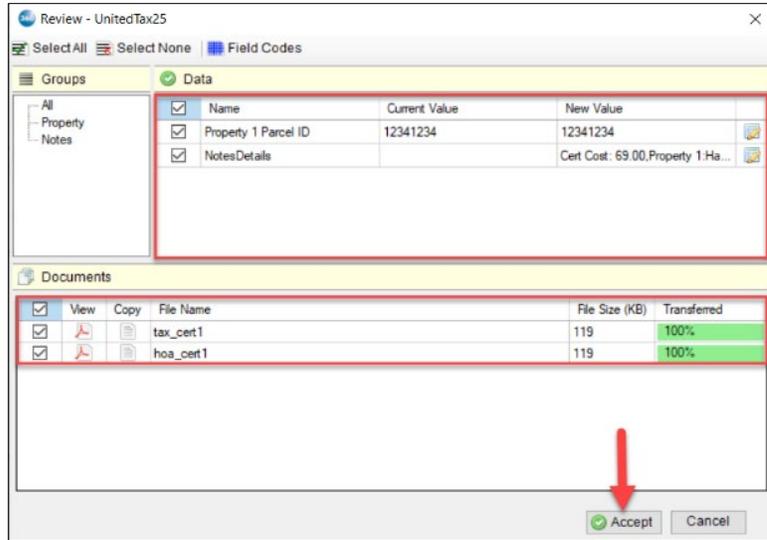
****NOTE** - All products ordered may not be sent at the same time.**

Provider	Service	Status	Linked Order
United Tax	Tax Service	Ready	UnitedTax25

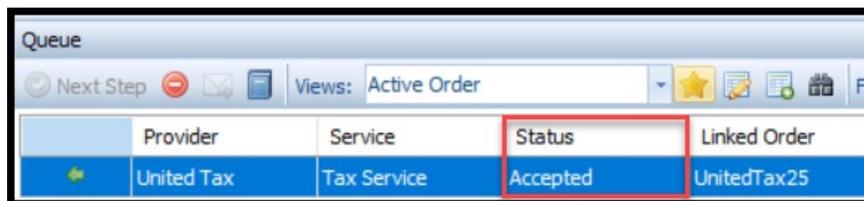
The **Review** screen shows the data and documents that will import to the ProForm order.

Click the

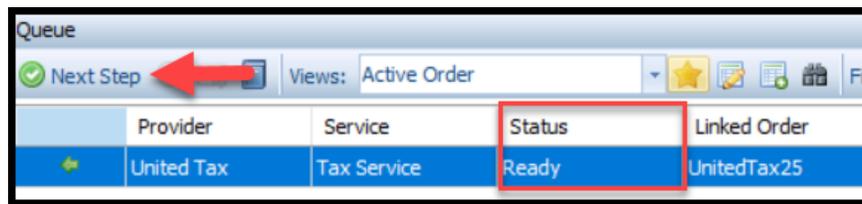
- **View**  icon to view the documents in PDF prior to importing.
- **Copy**  icon to save a copy of the document to the clipboard.
- **Accept** button to import the data and document(s) to the Select order
 - documents are saved to **Order Attachments**
 - data is written to **Order Notes**
- **Cancel** to return to the **360 Queue** without importing the data and documents.



Once accepted, the **360 Queue** is updated to show the **Status** as **Accepted**.



If additional products are sent from United Tax Services, the status will update to **Ready**, and the same process is followed to accept in the additional documents and/or data.

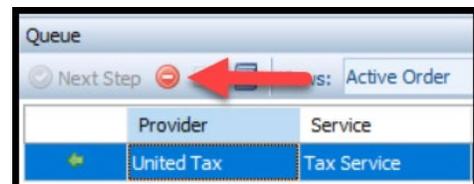


The screenshot shows a 'Queue' window with a toolbar at the top. A red arrow points to the 'Next Step' button. Below the toolbar is a table with the following data:

Provider	Service	Status	Linked Order
United Tax	Tax Service	Ready	UnitedTax25

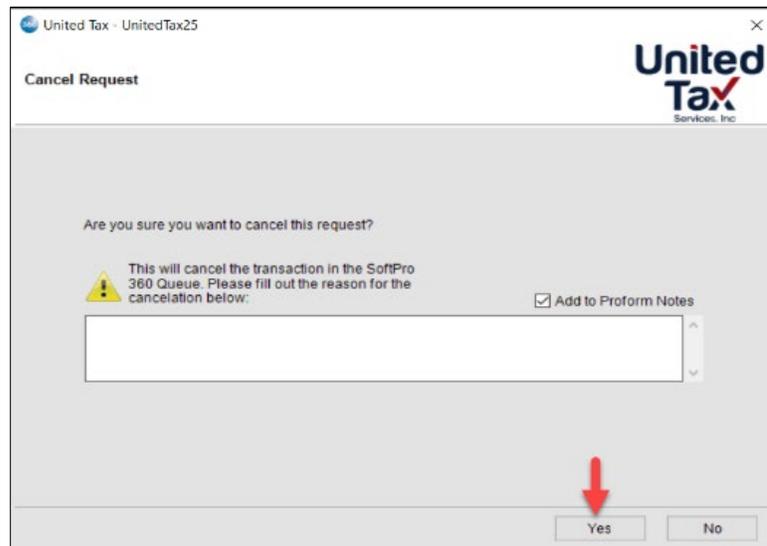
Canceling a Transaction

To cancel a transaction, click the **Cancel**  icon on the 360 Queue toolbar.



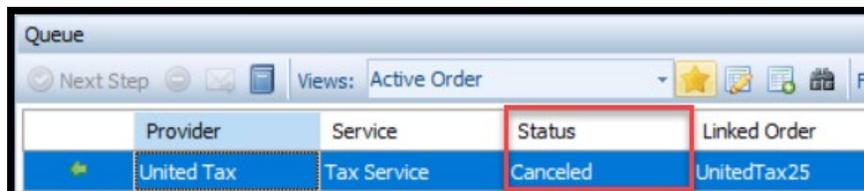
Enter the reason for the cancellation and click **Yes**.

When prompted, click **OK** to confirm submission of the cancellation request.



The screenshot shows a 'Cancel Request' dialog box from United Tax Services, Inc. The dialog asks: 'Are you sure you want to cancel this request?'. Below the question is a warning icon and text: 'This will cancel the transaction in the SoftPro 360 Queue. Please fill out the reason for the cancellation below:'. There is a text input field for the reason. A checkbox labeled 'Add to Proform Notes' is checked. At the bottom right, there are 'Yes' and 'No' buttons. A red arrow points to the 'Yes' button.

The transaction in the **360 Queue** is updated to show the **Status** as **Canceled**.



This screenshot shows the 'Queue' window after the cancellation. The 'Status' column for the transaction is now 'Canceled', highlighted with a red box. The table data is as follows:

Provider	Service	Status	Linked Order
United Tax	Tax Service	Canceled	UnitedTax25