

WFG National Title - Title Search User Guide

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Introduction

WFG National Title's Title Search product, allows agents to order Title Search products via SoftPro 360. The WFG National Title - Title Search integration with SoftPro 360 provides users with the ability to seamlessly place orders for WFG - Title Search's products and receive the results of those orders within SoftPro 360. Users will be able to submit an order, track the status of their requests and receive documents from WFG - Title Search all from within SoftPro 360.

Features

WFG National Title - Title Search users can:

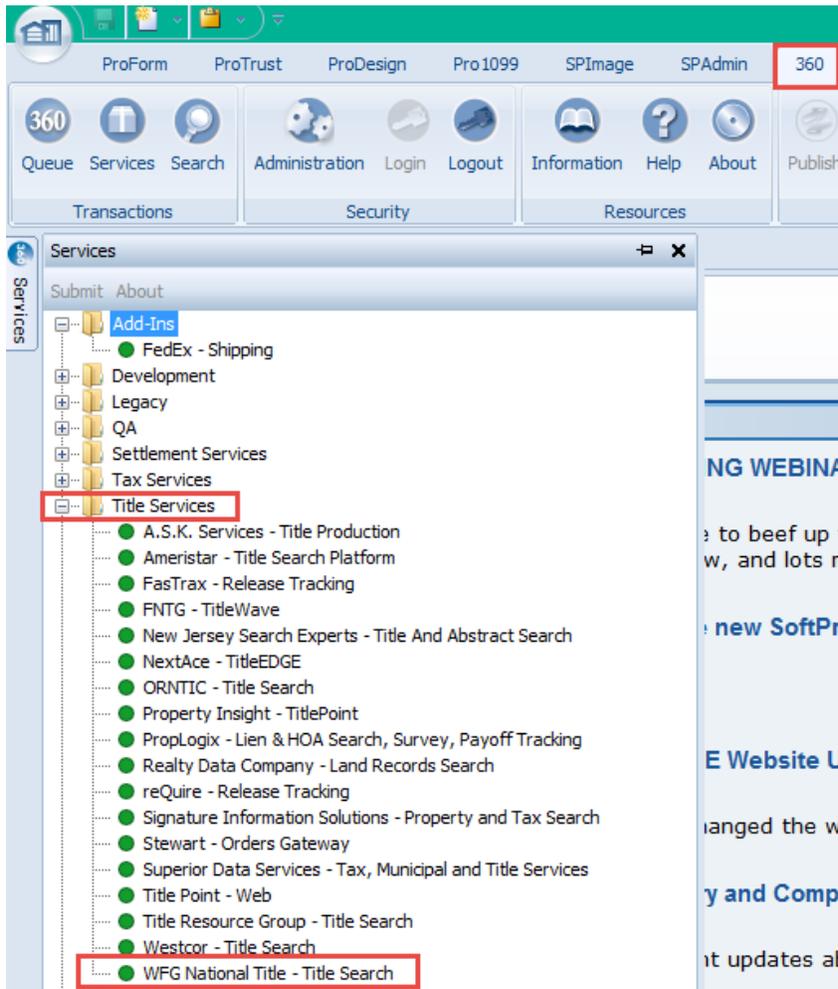
- Request WFG National Title - Title Search products.
- Track the status of their requests.
- Preview documents returned from WFG National Title - Title Search.
- Accept and attach documents to an order.

**** ONLY one (1) request/transaction per ProForm order can be submitted to WFG National Title via the WFG National Title – Title Search product in 360.**

Launching WFG National Title - Title Search

Access From The 360 Services Menu

From the **360** → **Services** menu, double-click **WFG National Title - Title Search** located under the **Title Services** folder. This will open the product.



Order Linking

The active ProForm order is automatically linked to the **WFG National Title – Title Search** service.

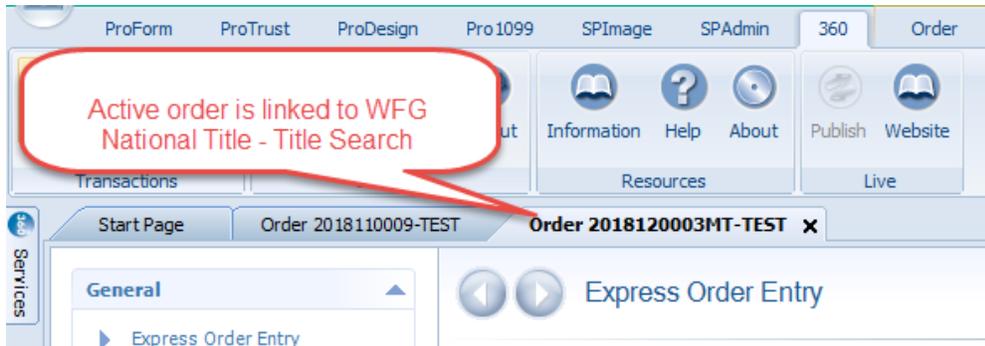


Figure 1 Select: Active Order

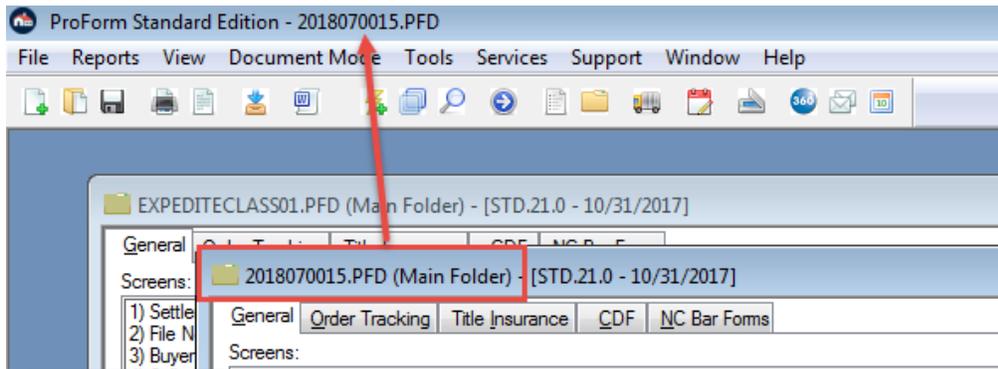
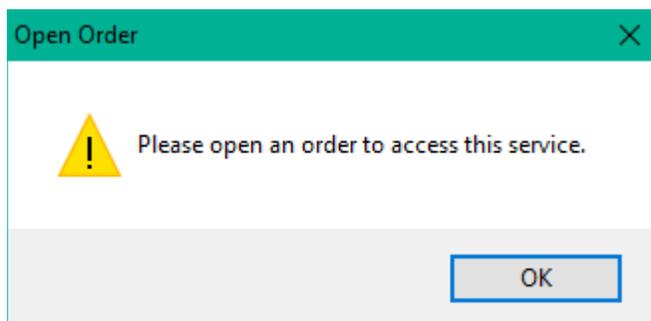


Figure 2 Classic: Active Order

- If more than one ProForm order is open, the top order is linked.
- If no order is open, the following message will be presented.



Login

The **Login** screen requires you to enter the **User ID** and **Password** provided to you by WFG National Title. The **Remember me** checkbox will allow you to automatically log in the next time you launch this product:

WFG National Title - 2018110009-TEST

Login

WFG National Title Insurance Company
a Williston Financial Group company

Please provide your credentials

User ID: testsoftpro

Password: *****

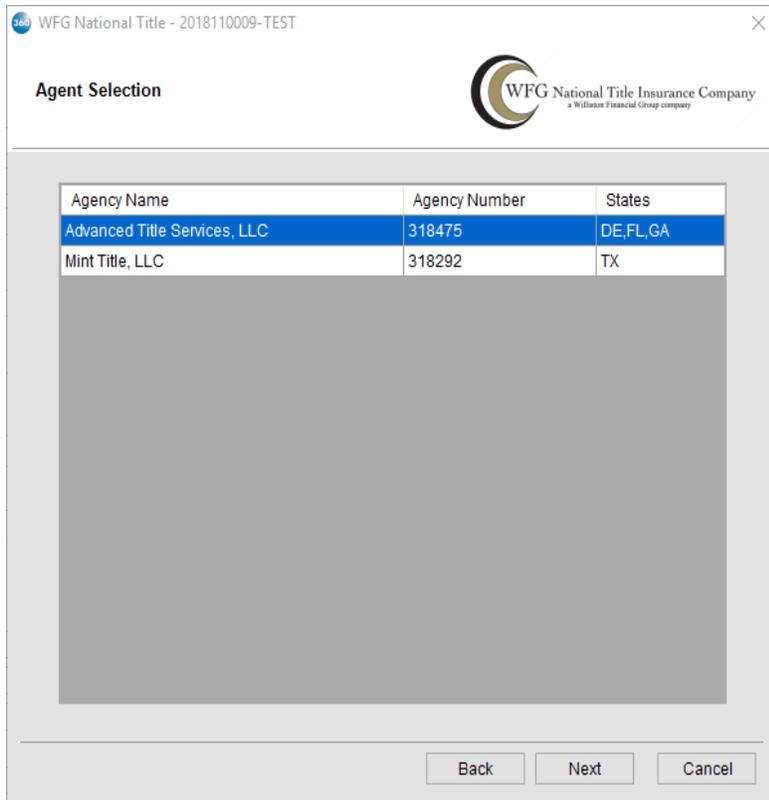
Remember Me

[Request WFG Access](#) Next Cancel

- Click **Next** to continue to the **Agent Selection** screen.

Agent Selection Screen

The **Agent Selection** screen provides a list of agencies available to the user. If the user is associated with more than one agency, the user will select the appropriate agency for the request.



Agency Name	Agency Number	States
Advanced Title Services, LLC	318475	DE, FL, GA
Mint Title, LLC	318292	TX

- Click **Back** to go to the Login screen.
- Click **Next** to continue to the **Data Selection** screen.
- Click **Cancel** to cancel the request.

Data Selection Screen

The **Data Selection** screen allows the user to select the **Property** (if multiple properties exist on the order), **City, State, Transaction Type, Property Type** and **Product** before submitting a request to WFG National Title. The user can also click **Add Documents** to attach documents to submit with the request to WFG National Title.

- **Property(s):** Information for the properties added within the ProForm order will populate into the fields. The first property listed in order will be listed by default.
 - Selecting a property will automatically display corresponding property information in property fields: Address, City, State, ZIP, Parcel ID, Brief Legal
 - Changes to Address 1, zip code, parcel ID and brief legal will have to be completed within the ProForm order.
- **City:** The city added for the property within the ProForm order will populate into the field.
- **State:** The state added for the property within the ProForm order will populate into the field.
- **County:** The county added for the property within the ProForm order will populate into the field.
 - A list of cities, states and counties will be available for the user to select if the city, state, or county entered in the ProForm order does not match the information associated with the zip code entered in the ProForm order (per WFG National Title records).

- **Transaction Type:** The transaction type selected within the ProForm order will populate this field. A list of transaction types specific to the Agency (selected on the Agent Selection) screen will be available for the user to select if the transaction type for a request is different than the selection made within ProForm (i.e. Search Package).
- **Property Type:** The property type selected within the ProForm order will populate this field. A list of property types specific to the Agency (selected on the Agent Selection screen) will be available for the user to select if the property type for a request is different from the selection made within ProForm (i.e. Builder).
- **Product:** A list of products specific to the Agency (selected on the Agent Selection screen) will be available for the user to select.
 - **Transaction Type, Property Type and Product fields are required.** The user cannot submit a request without a Transaction Type, Property Type or Product selected.
- **Notes:** Ability to add a note to include in the transaction. The Notes field is an optional field and any information added to the notes field is specific to the entire order.
 - **Add to ProForm Notes:** If the box is checked, the notes will be added to the ProForm order.
 - If multiple properties are added to the order, the property information for those properties will be shown in the Notes field. **** ONLY one (1) request/transaction per ProForm order can be submitted to WFG National Title via the WFG National Title – Title Search product in 360.**

WFG National Title - 20190100018 - MT - TEST
✕

Data Selection


Property:

Address 1:

City: State: Zip:

County: Parcel ID:

Brief Legal:

Transaction Type:

Property Type:

Product: Add to Proform Notes

Notes:

Additional Address 1-
Street Address: 1234 South Street, Austin, TX 73301

[Add Documents](#)
Back
Submit
Cancel

- The first property listed in order will be listed by default.

The screenshot shows a web application window titled "WFG National Title - 20190100018 - MT - TEST". The window contains a "Data Selection" form for WFG National Title Insurance Company. The form fields are as follows:

- Property:** A dropdown menu with "5621 East Side Avenue, Austin, TX 73301" selected.
- Address 1:** A dropdown menu with "5621 East Side Avenue, Austin, TX 73301" selected and "1234 South Street, Austin, TX 73301" visible below it.
- City:** "Austin" (dropdown), **State:** "TX" (dropdown), **Zip:** "73301-" (text input).
- County:** "Travis" (dropdown), **Parcel ID:** (empty text input).
- Brief Legal:** "Brief Legal Description" (text input).
- Transaction Type:** "Resale" (dropdown).
- Property Type:** "Residential" (dropdown).
- Product:** "Purchase w/ Loan" (dropdown), with an unchecked checkbox for "Add to Proform Notes".
- Notes:** A text area containing "Additional Address 1- StreetAddress: 1234 South Street, Austin, TX 73301" (highlighted in yellow).

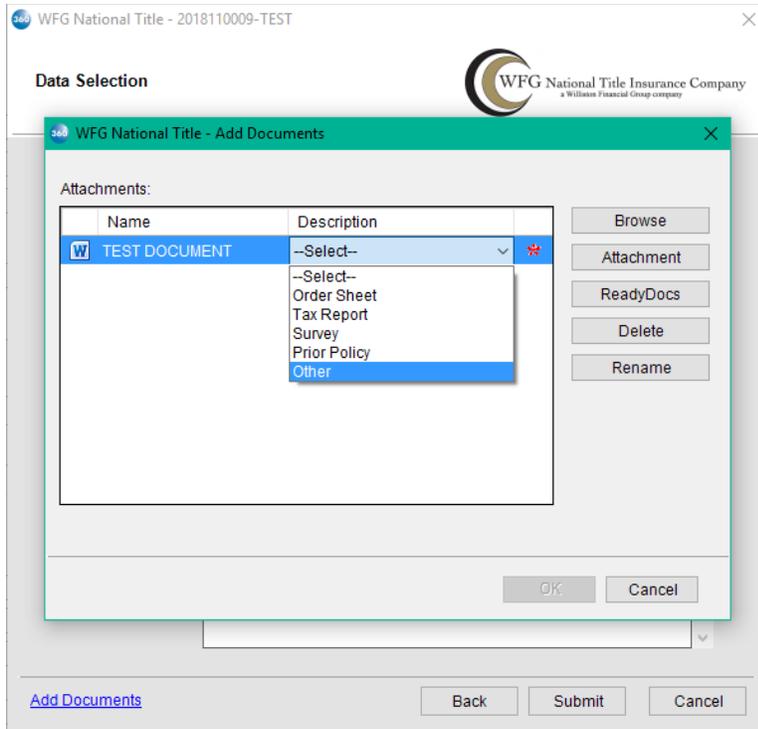
At the bottom of the form, there is a blue link "Add Documents" and three buttons: "Back", "Submit", and "Cancel".

- **Add Documents:** Click this link to add documents to be included in your request to WFG National Title - Title Search. See the [Adding Documents](#) section of this guide for more detail.

**** ONLY one (1) request/transaction per ProForm order can be submitted to WFG National Title via the WFG National Title – Title Search product in 360.**

Adding Document(s)

The **Add Document(s)** screen allows the user to attach documents before submitting the request to WFG National Title. After selecting documents, click **Close**:

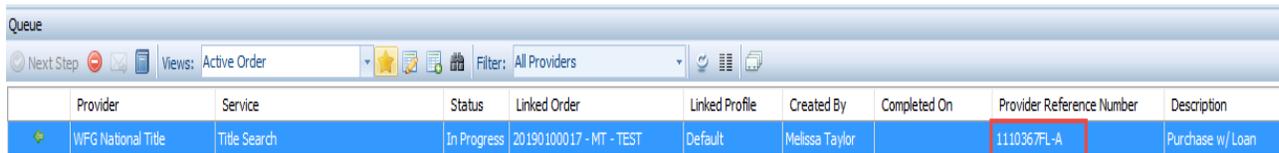


- **Browse:** Browse to find documents to submit.
- **Attachments:** Attach documents from the ProForm order.
- **ReadyDocs:** This button is not applicable to WFG National Title - Title Search transactions at this time.
- **Delete:** Delete documents from the list of documents before submitting.
- **Rename:** Rename the documents before submitting.

Once a document has been added to the request, the user will have to select the document type for each document. The user cannot submit a request without a Document Type selected for each document.

Accepting Data & Document(s)

In the 360 queue the transaction status will show as **'In Progress'** when a request has been sent to WFG National Title - Title Search. Upon receiving a request, WFG National Title will send the WFG File Number associated with the request. The WFG order number will update under the 'Provider Reference Number' column in the 360 queue.



Provider	Service	Status	Linked Order	Linked Profile	Created By	Completed On	Provider Reference Number	Description
WFG National Title	Title Search	In Progress	2019010017 - MT - TEST	Default	Melissa Taylor		1110367FL-A	Purchase w/ Loan

The transaction status will show as **'Ready'** when data and documents have been sent from WFG National Title - Title Search. The transaction status **'READY'** indicates a response has been received and is ready to be reviewed. The user will click **next step** to review the data and documents.



Provider	Service	Status	Linked Order	Linked Profile	Created By
WFG National Title	Title Search	Ready	2018110009-TEST	Default	Melissa Taylor

Review Screen

The **Review** screen allows the user to view, copy, and accept documents from WFG National Title - Title Search into the Select order.

Review - 2018050008 TEST

Groups | Current Value | Field Codes

Groups | Data

	Name	Current Value	New Value	
<input checked="" type="checkbox"/>	Name			
<input checked="" type="checkbox"/>	County	Travis	Sarasota	
<input checked="" type="checkbox"/>	Commitment Date	8/14/2018 5:00:00 AM	8/14/2018 5:00:00 AM	
<input checked="" type="checkbox"/>	Legal Description	LOT 22, BLOCK 57, CY...	LOT 22, BLOCK 57, CY...	
<input checked="" type="checkbox"/>	Title Vesting	James and Debora Ow...	James and Debora Own...	
<input checked="" type="checkbox"/>	Interest	LEASEHOLD	LEASEHOLD	
<input checked="" type="checkbox"/>	Property Type	Other	1-4 Family Residential	
<input checked="" type="checkbox"/>	Address		2705 Taheebo Way	

Notes Add to ProForm Note

Text

WFG Title Search - Note
Product Type ID: 2311
Agency ID: 731362

Documents

<input checked="" type="checkbox"/>	View	Copy	File Name	Transferred
<input checked="" type="checkbox"/>			SEARCH PACKAGE - CUSTOMER.pdf	100%

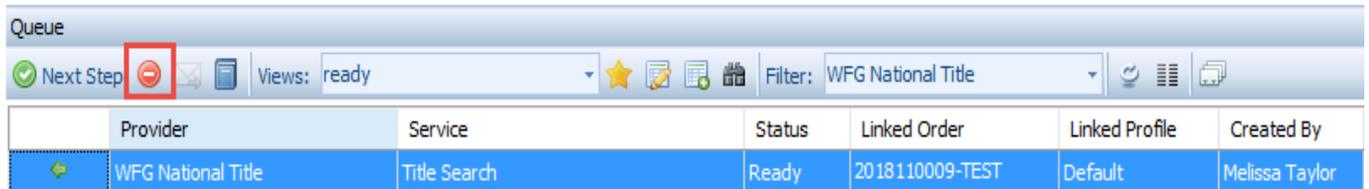
Overwrite Requirements/Exceptions

- **View:** View documents sent from WFG National Title - Title Search.
- **Copy:** Save a copy of the document to the clipboard.
- **Accept:** Accept and attach the selected data and document(s) into the Select order.
- **Overwrite Requirements/Exceptions:** When this option is checked, requirements and exceptions saved to the ProForm order will be removed and only the latest requirements and exceptions will be added to the ProForm order.

The accepted documents will be saved as attachments section of the ProForm order.

Canceling a Transaction

In the 360 queue the transaction status will show as 'ready' when data and documents have been sent from WFG National Title - Title Search. The transaction status will be 'READY' which indicates a response has been received and is ready to be reviewed. The user can click the cancel option to cancel the transaction within 360 when the transaction is in a 'ready' or 'in progress' status. To cancel the transaction with WFG National Title, the user will have contact WFG National Title to actually cancel the transaction.



The screenshot shows a software interface titled "Queue". It features a toolbar with a "Next Step" button (green checkmark), a "Cancel" button (red circle with minus sign, highlighted with a red box), and other icons. A "Views" dropdown menu is set to "ready". A "Filter" dropdown menu is set to "WFG National Title". Below the toolbar is a table with the following data:

	Provider	Service	Status	Linked Order	Linked Profile	Created By
	WFG National Title	Title Search	Ready	2018110009-TEST	Default	Melissa Taylor

