

Westcor – Title Search User Guide

60

Nov 2024

4800 Falls of Neuse Road, Suite 400 | Raleigh, NC 27609

p (800) 848–0143 | f (919) 755–8350 | <u>www.softprocorp.com</u>

Copyright and Licensing Information

Copyright © 1987–2024 by SoftPro, LLC

All rights reserved.

No part of this publication may be reproduced in any form without prior written permission of SoftPro. For additional information, contact SoftPro, 4800 Falls of Neuse Road Suite 600, Raleigh, NC 27609.

Microsoft and Windows are registered trademarks of Microsoft Corporation in the United States and/or other countries. Crystal Reports is a registered trademark of SAP AG. HP LaserJet is a registered trademark of Hewlett Packard Development Company, RealEC Technologies, Inc. is majority owned by ICE Mortgage Technology, Inc. All brands and product names are trademarks or registered trademarks of their respective companies.

IMPORTANT NOTICE - READ CAREFULLY

Use of this software and related materials is provided under the terms of the SoftPro Software License Agreement. By accepting the License, you acknowledge that the materials and programs furnished are the exclusive property of SoftPro. You do not become the owner of the program but have the right to use it only as outlined in the SoftPro Software License Agreement.

All SoftPro software products are designed to ASSIST in maintaining data and/or producing documents and reports based upon information provided by the user and logic, rules, and principles that are incorporated within the program(s). Accordingly, the documents and/or reports produced may or may not be valid, adequate, or sufficient under various circumstances at the time of production. UNDER NO CIRCUMSTANCES SHOULD ANY DOCUMENTS AND/OR REPORTS PRODUCED BE USED FOR ANY PURPOSE UNTIL THEY HAVE BEEN REVIEWED FOR VALIDITY, ADEQUACY AND SUFFICIENCY, AND REVISED WHERE APPROPRIATE, BY A COMPETENT PROFESSIONAL.

Table of Contents

Introduction4
Launching Westcor
Access from the 360 Services Menu5
Order Linking5
Welcome5
Logging In6
Issuing Office
6
Product and Lender Section
Additional Information7
Add Documents7
360 Order Queue9
Review Screen - Accepting Title Data and Documents9
Restrictive Covenants10
Update Order11
Cancel Order12

Introduction

The Westcor Title Search Integration with SoftPro 360 automates the delivery and receipt of the following products:

- TSR/Respa Commitment
- Commitment NON-RESPA
- Refinance
- Ownership and Encumbrance (O & E)
- Foreclosure Commitment
- Foreclosure Report
- Plat Search
- Modification Update
- Miscellaneous
- Ownership Only
- REO Commitment
- Commercial Commitment
- Express Commitment

Launching Westcor

Access from the 360 Services Menu

From the **360** \rightarrow **Services menu**, double-click **Westcor** – **Title Search** located under the Tools folder. This will open the Order Linking screen



Order Linking

From the Order Linking screen, select the ProForm order to be sent to Westcor

All orders that are currently opened will be listed in the Open Order Numbers pane. The selected Order Number field will populate with the current active ProForm order. You may select an order from any of the open orders, or you may choose to overwrite the Selected Order Number field with an order that is not currently open. Once you have confirmed an order to link, click **OK** to continue to the Welcome screen.

0	order Linking	
Γ	Open Order Numbers:	
	2017120012 2017110008 2017110007	
	Selected Order Number:	
	2017120012	
	OK Cancel	

Welcome

From the **Welcome** screen, click **Next** and go to the Login screen

Click the "**Skip Welcome Page**" checkbox to bypass this screen during future sessions.

Westcor Title Services - 2017120012	
Welcome	
Welcome to Westcor Land Title Insura you the ability to order Search Service Westcor takes special interest in you, partnership experience by providing in processes.	ance Company's Integration tool allowing s from Westcor directly from Softpro 360. as our agent, to cultivate a true novative solutions to streamline workflow
Trusted, Collaborative, innovative Pa Website:www.ewestcor.com Email:orders@wltic.com	rtner.
Skip Welcome Page	Next

Logging In

The **Login** screen requires you to enter a **valid username** and **password**. Check **"Remember Me"** to log in automatically when you launch the product in future sessions. Click **Login** to continue to the Issuing Office screen.

Westcor Title Se	rvices - 2017120012
Login	
	Please provide your credentials User ID : Sptestuser1 Password : ********* Remember Me
	Back Login Cancel

Issuing Office

After clicking **Next** on the Login screen, you will navigate to the Issuing Office screen where you can view and select an agency for the ProForm order you selected.



Product and Lender Section

From the Issuing Office screen, you will navigate to the **Product and Lender Selection** Screen where you can view the order information pulled from your ProForm order.



Additional Information

On clicking **"Additional Information"** on the Product and Lender Selection screen, you will navigate to the **File Information** screen where you can view the property(s) and contacts (Buyers and Sellers) details pulled from your ProForm order. Click on **Close** to return to the Product and Lender Selection screen.



Westcor Title	Services - 2017120012		×
File Informat	ion	444	WESTCOR LAND TITLE INSURANCE COMPANY
Property Bu	yers & Sellers		
The follow	ving contact(s) will be sent with	your order:	
Туре	Name	Relationship	Category
Buyer	Brunet Pierre	, a single man	Individual
Seller	Brunet Hercule		Individual
Seller	Olga Bataille-Hercule		Individual
			Close

Add Documents

On clicking Next on the Product and Lender Selection screen, you will be navigated to the "Add Documents" screen where you can attach documents to be sent along with your ProForm order to Westcor. You can **browse** and select the document from your system, or you may select any documents **already attached** to your ProForm order.



Service Westcor Title Service	es - 2017120012	<u> </u>
Add Document(s)		
	Attached Documents	
Documents :	Please select a document attached to the order.	
Name	Type Description	Browse
W Westco	PolicyJacket_Lender_2017120012_20171205	Hachmant
W 360-W	PolicyJacket_Owner_2017120012_20171205	ttacnment
	W test_word_1	ocuments
	test_image_1	
	RDC_Notes	Kename
	PolicyJacket_Lender_2017120012_20171206	Delete
	PolicyJacket_Lender_2017120012_20171206 (1)	
	OK Cancel	
	.4	
	Back Submit	Cancel
	Dack	

You can also **rename** or **delete** any attachment by selecting the document and performing the desired action.



Once you have added the desired documents to your order, click **Submit** to send the order details to Westcor. You will see the **Order Progress** screen which depicts that the order is being sent to Westcor.

Westcor Title Services - 2017120012	×
Order Progress	WESTCOR LAND TITLE INSURANCE COMPANY
Sending order data to Westcor	

360 Order Queue

Within the SoftPro 360 queue, an **In Progress** transaction will be created when an order is submitted. The transaction will display the ProForm order number, which is the linked order.

Queue							
📀 Next St	ep 🤤 🖂 🗐 View	s: Active Order	+	🚖 📝 🗟 🃸	Filter: All Provider	s	-
	Provider	Service	Status	Linked Order	Linked Profile	Created By	Cr
\$	Westcor	Title Search	In Progress	2017120012	Default	Viswanath Thalla	1/1
\$	Westcor	Title Search	Rejected	2017120012	Default	Viswanath Thalla	1/1

When Westcor sends back title data and document(s), the transaction will update to a Ready status.

Queue							
🕑 Next St	ep 💿 🖂 🗐 View	s: Active Order	-	🚖 📝 🗔 🏙	Filter: All Providers	5	• 2 11 🗇
	Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On
\$	Westcor	Title Search	Ready	2017120012	Default	Viswanath Thalla	1/16/2018 3:16 PM
\$	Westcor	Title Search	Rejected	2017120012	Default	Viswanath Thalla	1/16/2018 12:4

When you click **Next Step**, you may proceed to the Review Screen and review the title data and documents sent by Westcor.

Review Screen - Accepting Title Data and Documents

From the Review screen, you will be able to view and specify which data and document(s) returned by RDC that you want to include in your order.

The Data section will display the name of the field, the corresponding value currently in the linked order (Current Value) and the new value of that field returned from Westcor (New Value). The Documents section will display the products that were also returned from Westcor.

Groups Data -All Exceptions -Requirements Tele ✓ Name Current Value New Value ✓ -Value ✓ Underwitter Westcor Land Tile Insuranc ✓ ✓ ✓ - Notes ✓ <th colspan="11"></th>											
Image: Participation Image: Participation Exceptions Requirements Notes Image: Participation Current Value New Value Image: Participation Ld 23, Block 47, Lehigh Ac Ld 23, Block 47, Lehigh Ac Ld 23, Block 47, Lehigh Ac Image: Participation Ld 23, Block 47, Lehigh Ac Ld 23, Block 47, Lehigh Ac Ld 23, Block 47, Lehigh Ac Image: Participation Ld 23, Block 47, Lehigh Ac Ld 23, Block 47, Lehigh Ac Ld 23, Block 47, Lehigh Ac Image: Participation Ld 23, Block 47, Lehigh Ac Ld 23, Block 47, Lehigh Ac Ld 23, Block 47, Lehigh Ac Image: Participation Ld 23, Block 47, Lehigh Ac Ld 23, Block 47, Lehigh Ac Ld 23, Block 47, Lehigh Ac Image: Participation Ld 23, Block 47, Lehigh Ac Ld 23, Block 47, Lehigh Ac Ld 23, Block 47, Lehigh Ac Image: Participation Ld 23, Block 47, Lehigh Ac Ld 23, Block 47, Lehigh Ac Image: Participation Image: Participation Doutined Ld 23, Block 47, Lehigh Ac Image: Participation Image: Participation Image: Participation Doutined File Name File Name File Size Transfer Image: Participation Doutined File Name File Size Transfer Image: Participation Doutined File Name File	Grou	ups		Oata							
Exceptions Notes Image: Construction of the image of th	Al			Name Name	Current Value	New Value		1			
Notes Image: Construint of the state of the	Bequirements Underwriter Westco				Westcor Land Title Insuranc	Westcor Land Title Insurance	o 🔯	1			
↓ Table ↓ Address 1 101 Test Street 12 Willion Dr. None ↓ Willion Dr. None	- Notes Legal Description Lot 23, Block 47, Lehigh Ac Lot 23, Block 47, Lehigh						r 🔯				
Vew Copy Boca Raton	- Title			Address1	101 Test Street	12 Willion Dr. None					
Image: Copy Documents Space Space <thspace< th=""> Space Space<</thspace<>				City	Boca Raton	Boca Raton Boca Raton					
Image: Construction of the state o				Zip	32616	32616 55555					
Documents File Name File Size Transfer V Vew Copy Document Name File Name File Size Transfer V W Istest_word_1 test_word_1doc 114.50 KB 100% V Image: 1 test_mage_1 test_mage_1 test_mage_1 filf 47.37 KB 100% V V Image: 1 Combined_Report Combined_Report 188.91 KB 100% V Image: 1 Westcor_Notes Westcor_Notes:ff 0.23 KB 100%	📝 APN/Parcel ID 10215 19-44-27-10-00047.0230 📝 🔻										
☑ Vew Copy Document Name File Name File Size Transfer ☑ ☑ Intest_word_1 test_word_1doc 114.50 KB 100% ☑ Image_1 test_word_1doc 114.50 KB 100% ☑ Image_1 test_mage_11 ff 47.37 KB 100% ☑ Image_1 test_mage_16 Feotogen 18.91 KB 100% ☑ Image_1 Combined_Report Combined_Report 23 KB 100%	Documents										
♥ ♥ ■ test_word_1 test_word_1doc 114.50 KB 100% ♥ ● ■ test_image_1 test_image_1if 47.37 KB 100% ♥ ▶ © Combined_Report Combined_Report 188.91 KB 100% ♥ ● ● Combined_Report 200% 23 KB 100%	V	View	Сору	Document Name	File Name	File Size	Transfe	erre			
Image Image 1 test_image <	V	W		test_word_1	test_word_1.doc	114.50 KB	100%				
Image: Combined_Report Combined_Report_pdf 188.91 KB 100% Image: Combined_Report_Notes Westcor_Notes.tf 0.23 KB 100%	V	test_image_1 test_image_1.tf 47.37 KB 100%									
Westcor_Notes Westcor_Notes.tf 0.23 KB 100%	V	۶L		Combined_Report Combined_Report.pdf 188.91 KB 100%							
	Vestcor_Notes Westcor_Notes.rtf 0.23 KB 100%										

If the checkbox next to a data field is checked, then the New Value will overwrite the Current Value in the order when you click **Accept**. Similarly, if it is checked for a document, then that document will attach to the linked order. Otherwise, if the checkbox is unchecked, then the corresponding data and document will be ignored.

If the data and documents are not accepted, the **Cancel** button closes the Review screen and no data or documents will be accepted. By clicking **Accept**, the transaction status will change to **Accepted** in the 360 transaction queue.

Note that if the checkbox next to **"Overwrite Requirements/Exceptions"** is *unchecked*, then the requirements and exceptions that are returned by Westcor will *append* to those that are already in the order. If it is checked, then they will overwrite the requirements and exceptions in the order. However, if there are, for example, two requirements that are returned from Westcor and there are five in the order, then only the first two of the five requirements in the order will be overwritten. The last three will remain in the order.

Restrictive Covenants

If the vendor as determined the data belongs to the "Recording information of Restrictive Covenants" field, the Review screen will display the Exception data as "**Restrictive Covenants**".

Upon clicking Accept, the data will be mapped to the "Recording information of Restrictive Covenants" field, under Custom Fields in the Commitment – Schedule A Title section.

Exceptions			Name	Current Value				
- Exceptions Requirements				Current Value	New	Value		^
· · · · · · · · · · · · · · · · · · ·		\checkmark	Effective Date	05/02/2023	5/2/2	023 12:00:00 AM		
Notes		\checkmark	Ownership Interest	Fee Simple	Fee Si	mple		
· Title		\checkmark	Current Owner	Sally Seller	Sally S	eller		
		\checkmark	Restrictive Covenants		Restric	tions, dedications, re	s 😥	
	- 1	\sim	Requirements [7]/ Description		Specia	al Warranty Deed from	📝	
		\checkmark	Requirements [8]/ Description		Provid	e an affidavit by curre	🔯	~
Documents								
View Co	opy [Docume	nt Name	File Name		File Size	Transfe	rec
	N	lestcor_	Notes	Westcor_Notes.rtf		1.04 KB	100%	

Title 🔺			_							
	Properties:	6	Prope	erty Address		Legal Description				
Title Legal Description		► 5	6185	Retail Road		No Legal Description				
Preliminary Title Search & Opinion										
Existing Liens										
Title Incurance Premiume										
Commitment - Schedule A	Notes (0)									
Final Title Opinion	Custom Dalla									
Pillar file opinion	Custom Fields	Custom Heids								
Policy - Schedule A	Schedule B Requirements in	Schedule B Requirements included								
Policy - Schedules B1, B2										
Endorsements	Expiration time period:									
Additional Title Charges										
Escrow/Closing										
	Recording information of Restri	ctive Cove	enants:							
			_							

Before Clicking Accept:

cording information of Restrictive Covenants:	
	^
	\sim
After Clicking Accept:	
cording information of Restrictive Covenants:	
Restrictions, dedications, reservations, setbacks and easements, if any, as indicated and/or shown on that certain Plat recorded in Plat Book 34, at Pages 97 and 98, of the Public Records of Orange County, Florida. Restrictions, reservations, covenants and conditions pursuant to that certain instrument recorded to Official Records Book 4906, Page 4021, and any amendments, of the Public Records of Orange County, Florida, including the following: a) provides for a private charge assessment. Resolution of the Board of County Commissioners Establishing a Municipal Service Taxing Unit/Benefit Unit for Mainteance of Retention Pond(s) in Pershing Heights recorded in Official Records Book 502, Page 3817, of the Public Records of Orange County, Florida. Resolution of the Board of County Commissioners Establishing a Municipal Service Taxing Unit/Benefit Unit for Streetighting for Pershing Heights recorded in Official Records Book 502, Page 3817, of the Public Records of Orange County, Florida. Any lien provided by Chapter 159, Florida Statutes, in favor of any city, town, village or port authority for unpaid service charges for service by any water , sewer or gas system supplying the insured land.	*

Update Order

Transactions that have a status of **In Progress** and **Accepted** can be updated by highlighting the transaction and clicking on the **Next Step** button.

Queue	lueue							
🚫 Next Step 📄 🖂 📄 Views: Active Order 🗸 🚖 🎲 🞲 📸 Filter: All Providers						1	- 2 11 💭	
	Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On	
.	Westcor	Title Search	Accepted	2017120012	Default	Viswanath Thalla	1/16/2018 3:16 PM	
\$	Westcor	Title Search	Rejected	2017120012	Default	Viswanath Thalla	1/16/2018 12:4	

When you click the **Next Step** button, you will be prompted to provide your login credentials on the login screen. If you had checked the "Remember Me" checkbox during order creation, then you will automatically be logged in to the Update screen.

(Westcor Title Service	es - 20171200	12		×
	Login		4		STCOR LE INSURANCE COMPANY
		User ID: Password:	Please provide your credentials sptestuser1 		
	Ple	ease wait		Login	Cancel

On the **Update or Revision Request screen**, you will see the below items which you can update on your ProForm order:

Update Request:

- Update Type Select an update type from the below options:
 - o Pre-Closing
 - Post-Closing
- **Closing Date** Provide the new Closing Date.
- **Due Date** Provide the new Due Date.
- Notes- Provide notes if any.

Indate or Revision Request		MA	WFS	TCOR
puate of revision request		44	LAND TITLE INS	URANCE COMPANY
Update Req	quest 🔿 Rev	ision Reque	st	
Update Type: (Pre-Closing			
(O Post-Closing			
Closing Date:		*		
Due Date:		*		
Notes:	Î.		^	

Revision Request:

- Notes- Provide revised notes.
 - The user has the option to submit revised notes. The 360 system will then transmit the revised notes along with the original submission request, with the Update type designated as Pre-Closing.

Jpdate or Revision Request		WES LAND TITLE IN	STCOR
O Update Re	quest 💿 Revisio	on Request	
Update Type:	Pre-Closing		
Closing Date:			
Due Date:			
Notes:		^	
	L	~	

The order will be submitted to Westcor when you click the **Submit** button.

Westcor Title Services - 2017120012	×
Order Progress	WESTCOR LAND TITLE INSURANCE COMPANY
Sending order data to Westcor	

Upon a successful submit, the transaction status will change to "In Progress" in the 360 transaction queue.

Queue							
📀 Next St	ep 🔘 🖂 📋 View	s: Active Order	-	🚖 📝 🖪 📸	Filter: All Providers	;	- 2 11 🗇
	Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On
\$	Westcor	Title Search	In Progress	2017120012	Default	Viswanath Thalla	1/16/2018 3:16 PM
\$	Westcor	Title Search	Rejected	2017120012	Default	Viswanath Thalla	1/16/2018 12:4

Note: When users update the Westcor Title Search Order and encounter the pop-up message displayed below, they are advised to contact Westcor.

"The transaction you are trying to update was created on an older version of the Westcor/SoftPro integration. If you would like to order an update for this transaction, please send an email request to updates@wltic.com"

Cancel Order

Transactions that have a status of **In Progress** (after first Submit) can be canceled by highlighting the transaction and clicking on the **Cancel** button.

Queue	Queue								
📀 Next St	eş 🥥 🖾 🗐 View	s: Active Order	*	🚖 📝 🖪 🏙	Filter: All Providers	1	• 2 II 🗇		
	Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On		
\$	Westcor	Title Search	In Progress	2017120012	Default	Viswanath Thalla	1/16/2018 6:54 PM		
\$	Westcor	Title Search	Accepted	2017120012	Default	Viswanath Thalla	1/16/2018 3:16 PM		
	Westcor	Title Search	Rejected	2017120012	Default	Viswanath Thalla	1/16/2018 12:4		

The Cancel dialog will tell you that you must contact Westcor to cancel this transaction, and you must click **"I Agree"** to change the transaction status to **Canceled**.

Westcor Title Services - 2017120012	×
Cancel	WESTCOR LAND TITLE INSURANCE COMPANY
Please contact Westcor directly to cancel your trans within 360 will only remove the transaction from you your request to cancel.	action. Canceling this transaction from 7360 queue and will not notify Westcor of
	Submit Cancel

The status of the transaction in the SoftPro 360 queue will change to **Canceled**.

Westcor Title Services - 2017120012	X
Order Progress	
Cancelling Transaction from Queue	

Q	ueue							
Next Step 🔘 🖂 间 Views: Active Order			-	🚖 📝 🖪 🃸	Filter: All Providers	;	• 2 II 🗇	
		Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On
	\$	Westcor	Title Search	Canceled	2017120012	Default	Viswanath Thalla	1/16/2018 6:54 PM
	\$	Westcor	Title Search	Accepted	2017120012	Default	Viswanath Thalla	1/16/2018 3:16 PM