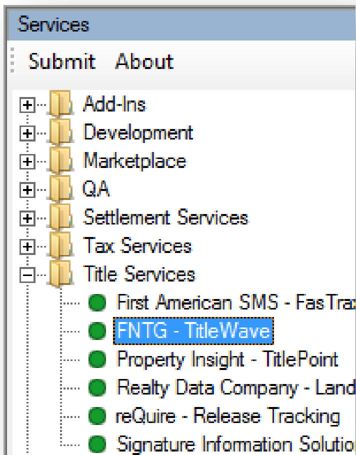
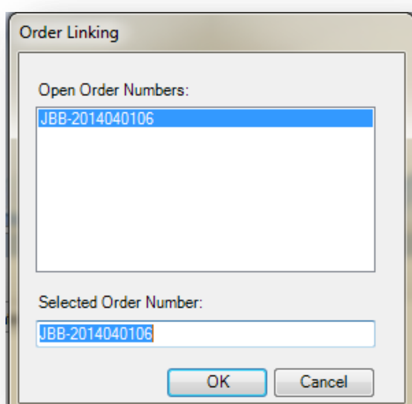
Managing TitleWave Transactions in SoftPro 360

How to Submit a Transaction

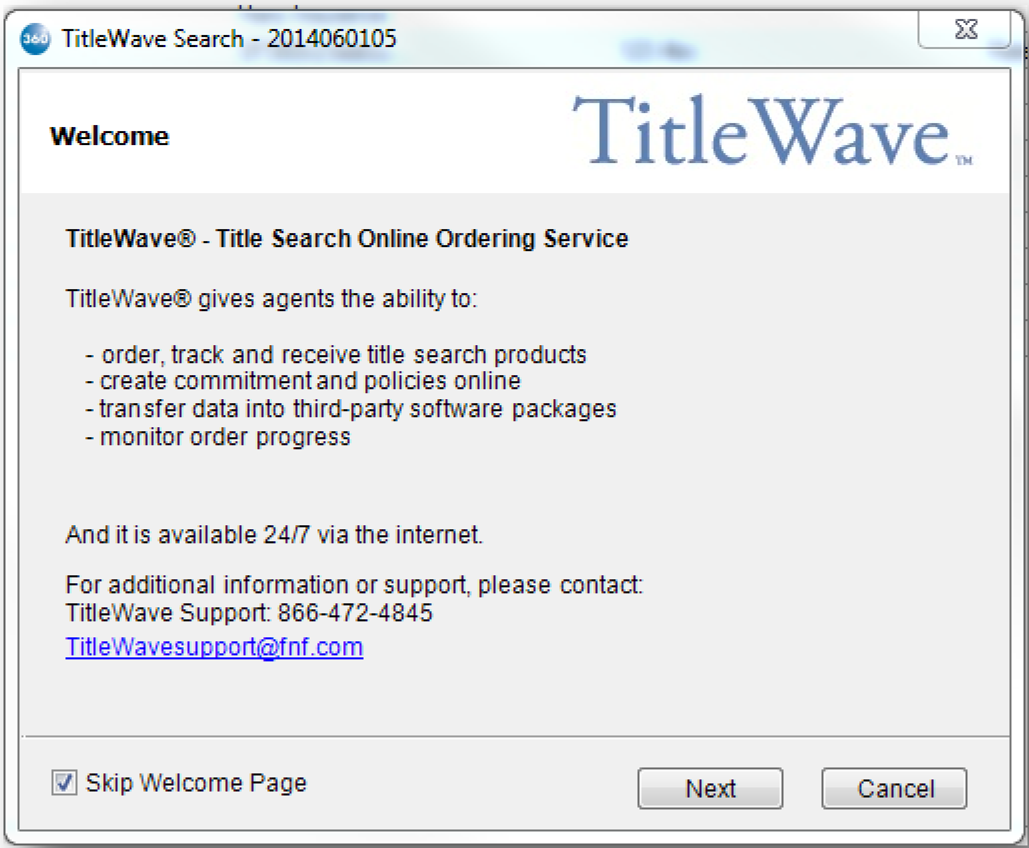
TitleWave can be found in the SoftPro360 Products menu under Title Services.



If a ProForm order(s) is already open, it will be listed in the Order Linking dialog. The active order will be highlighted and entered in the Selected Order Number field. Any of the order listed can be selected or the Selected Order Number can be overwritten with an order that is not currently open. Click OK to continue.

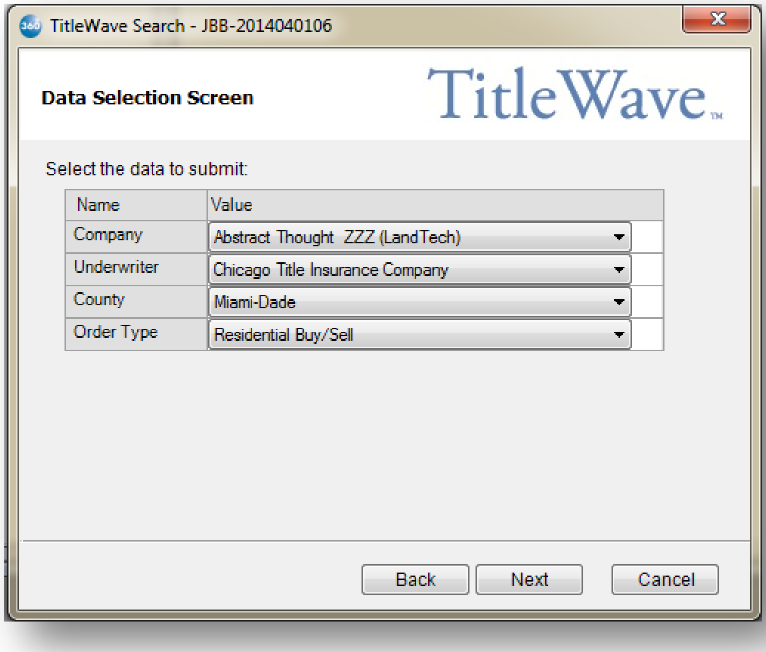


The Welcome screen provides a brief description about TitleWave along with TitleWave's support contact information. This screen may be skipped in the future by clicking on the Skip Welcome Page option. Click Next to continue.

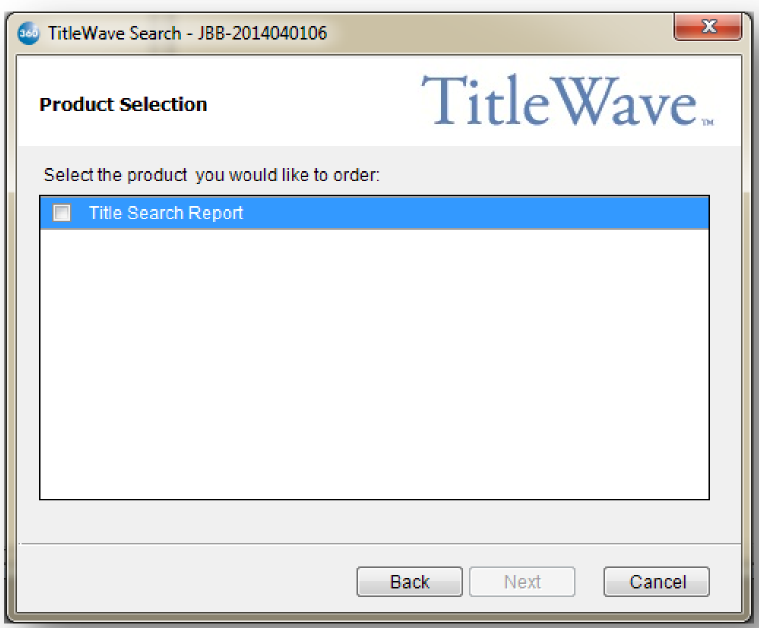


The Login screen requires a User ID provided by TitleWave. If the Remember me check box is selected the User ID will be saved and login will be automatic the next time the product is launched. Click Next to continue.

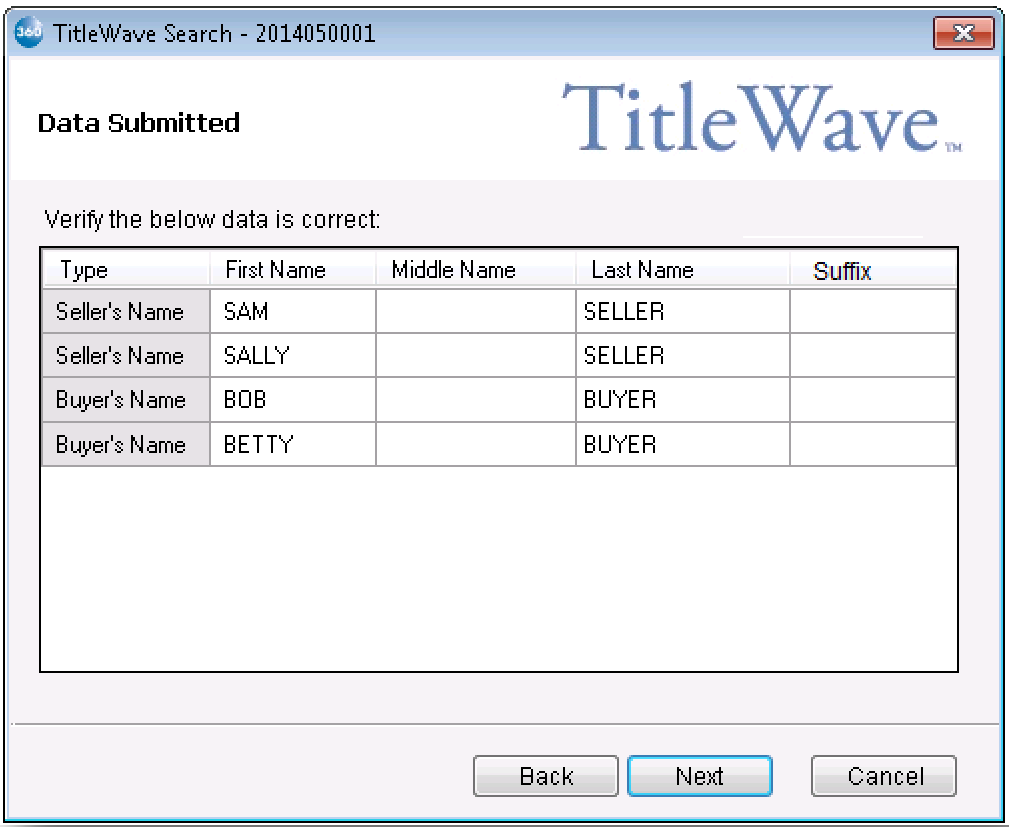
The Data Selection Screen allows the Company, Underwriter, County and Order Type to be selected. The County field will attempt to validate the County from the ProForm Order. If a match can not be made then a County will need to be selected from the drop down. Once all information is selected click Next to continue.



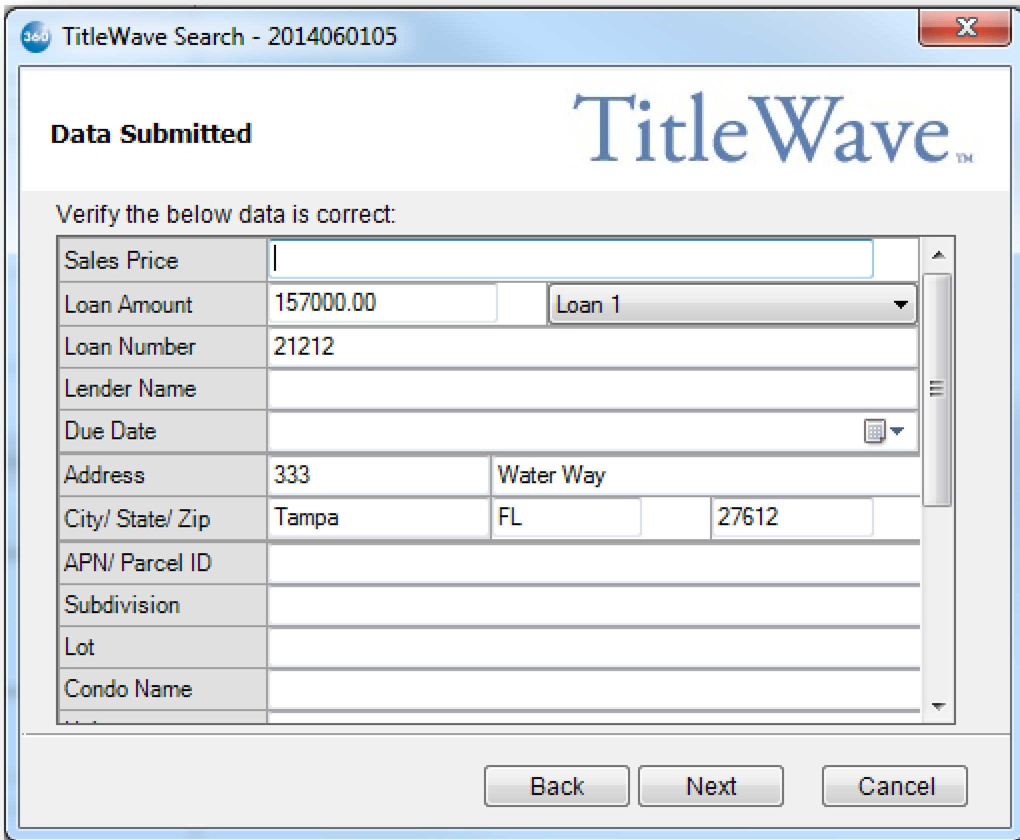
The Product Selection screen will display the available products based upon the values selected on the Data Selection screen above. Once a product has been selected click Next to continue.



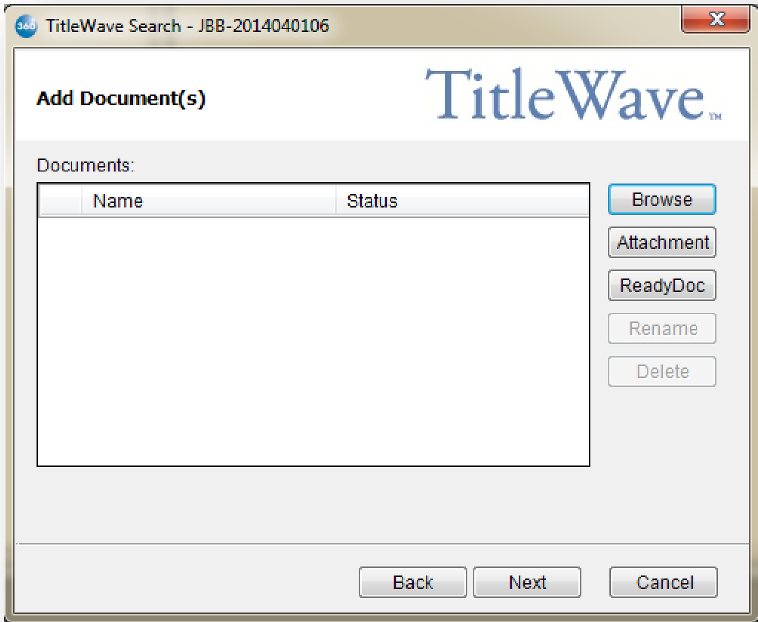
The first Data Submitted screen will show the Buyer's and Seller's name. Once the information has been verified click Next to continue.



The second Data Submitted screen will show the order information from the linked ProForm order. Information can be added or modified on this screen before submitting. The changes made will not change data in the linked ProForm order. Click Next to continue.

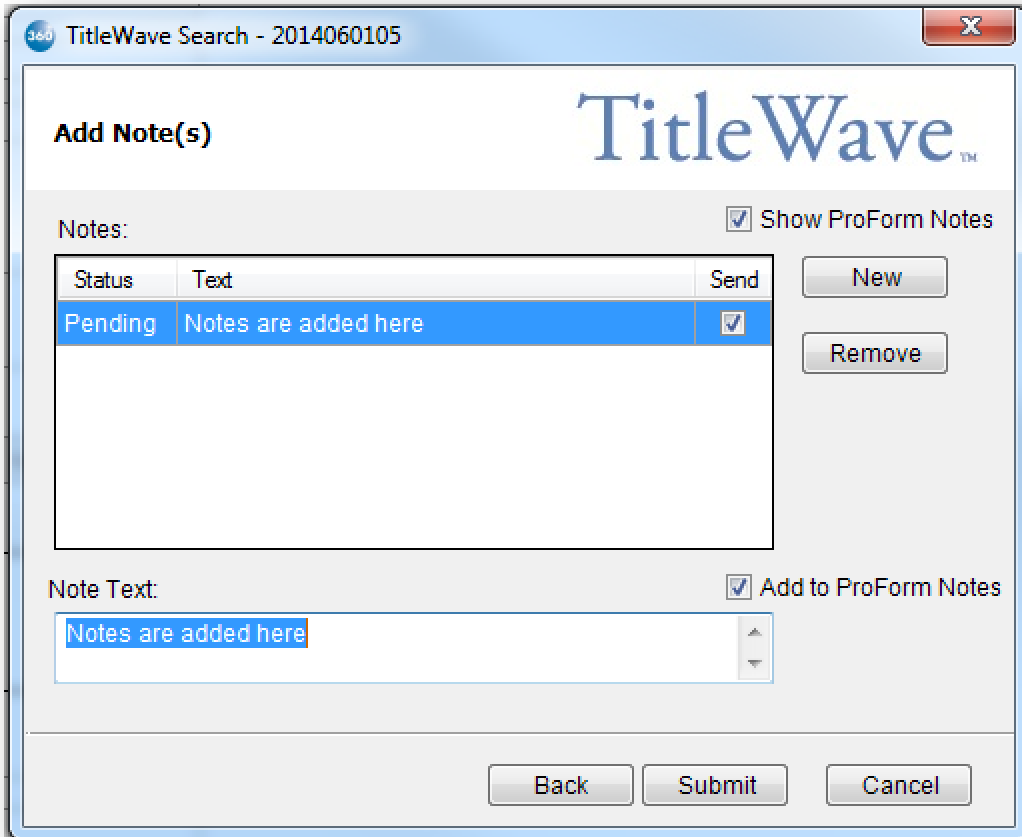


The Add Document(s) screen allows for a document to be attached and submitted. Once the document(s) is attached click Next to continue.

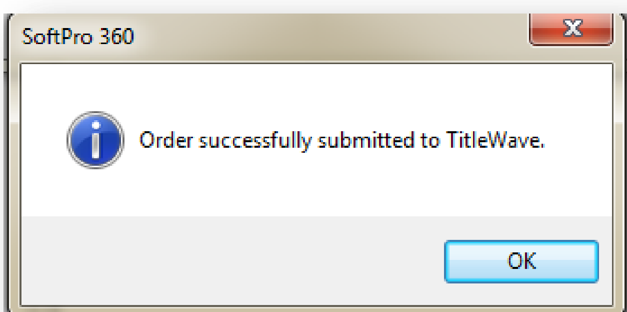


The Add Note(s) screen will allow for notes to be included in the order request. The Show ProForm Notes option will show any notes that are in the linked ProForm Order. Click New to add a new note the

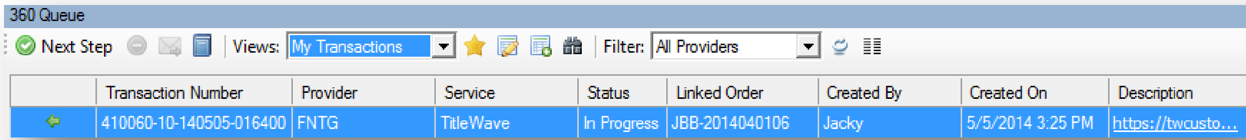
Add to ProForm Notes option is selected by default and will add the note to the ProForm Order. Click Submit to submit the request.



A Successful message will be received once the transaction is submitted. Click OK to close.

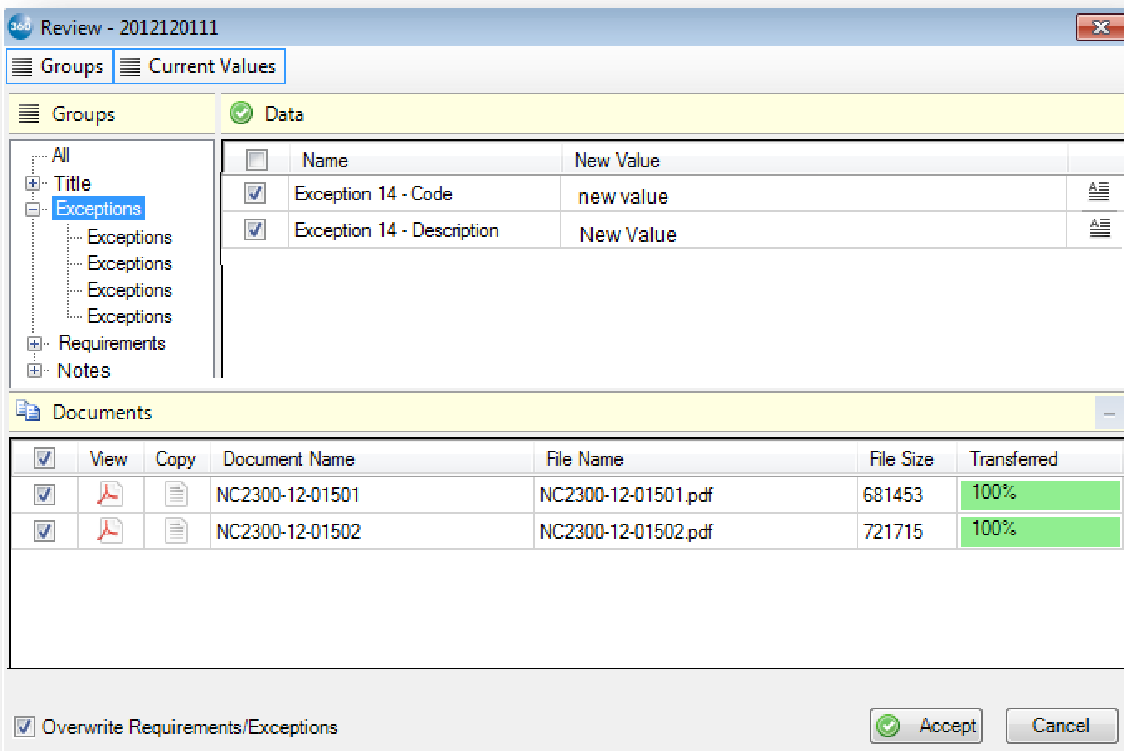


The transaction will appear in the SoftPro 360 Queue with a status of In Progress. The TitleWave order number will be reflected in the SoftPro 360 log. To update the transaction click Next Step to be taken to the document attachement screen to attach documents or add notes to the transaction. **** This TitleWave order number can also be added to the display view****



How to Review a Transaction

Once TitleWave has completed the transaction the status will change to Ready in the SoftPro 360 Queue. Highlight the transaction and click the Next Step Button or double click on the transaction to open the review screen.



TitleWave will return data and document(s) which will be visable on the Review Screen. The Review Transaction screen allows document(s) to be viewed by clicking the View icon. Click Accept to add the data and document(s) to the linked ProForm order. The document(s) will be available from within the linked ProForm order via the SPImage icon located on the ProForm Menu bar, or via SmartView. Or, for Select users, the document(s) will be available by clicking on the Attachments & Documents History link located in the documents tab. If the data and documents should not be accepted, the Cancel button closes the Review screen and no data or documents will be accepted.

The transaction will update to an Accepted status after clicking Accept. Although the transaction is in an Accepted status updates can still be sent and received by highlighting the transaction and either double clicking or clicking the Next Step icon. Incoming updates will change the status of the transaction to 'Ready' then back to 'Accepted' after the updates have been accepted. Updates are allowed up to one year from the order date.