PropLogix Search Integration
User Guide v1.0

April 2018

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Table of Contents

Introduction

The PropLogix Integration with SoftPro 360 automates the delivery and receipt of below products:

- **Municipal Lien Search**
- **Association Estoppels**
- **Survey**
- **Payoff Tracking**

Launching PropLogix

Access from the 360 Services Menu

From the **360 → Services menu**, double-click **PropLogix – Lien and HOA Search, Survey, Payoff Tracking** located under the **Tools -> Title Services** folder. This will open the Order Linking screen:
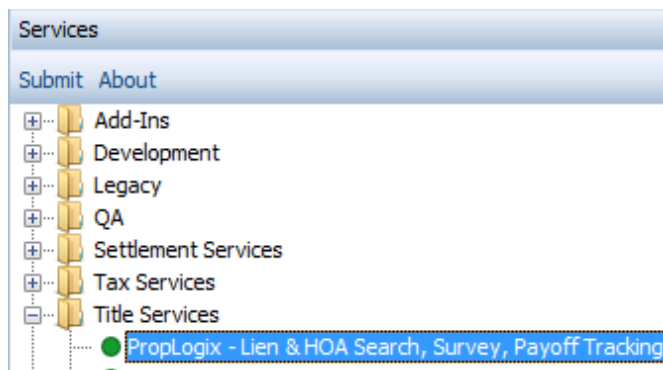
Figure 1 - SoftPro 360 Services Menu

Order Linking

From the **Order Linking** screen, select the ProForm order to be sent to Westcor:
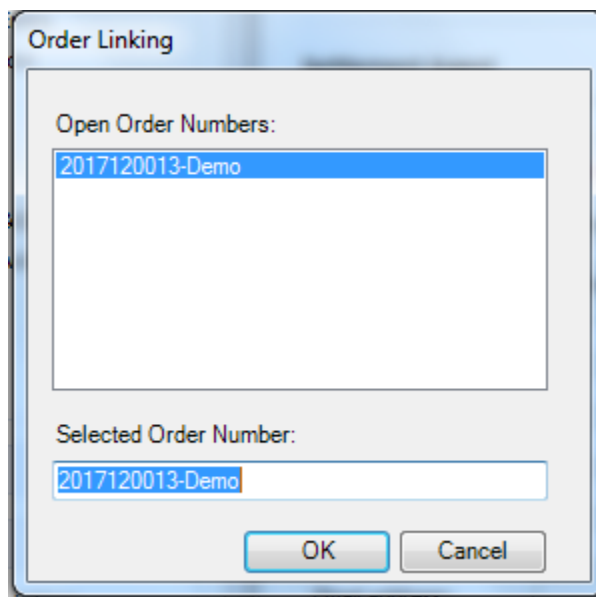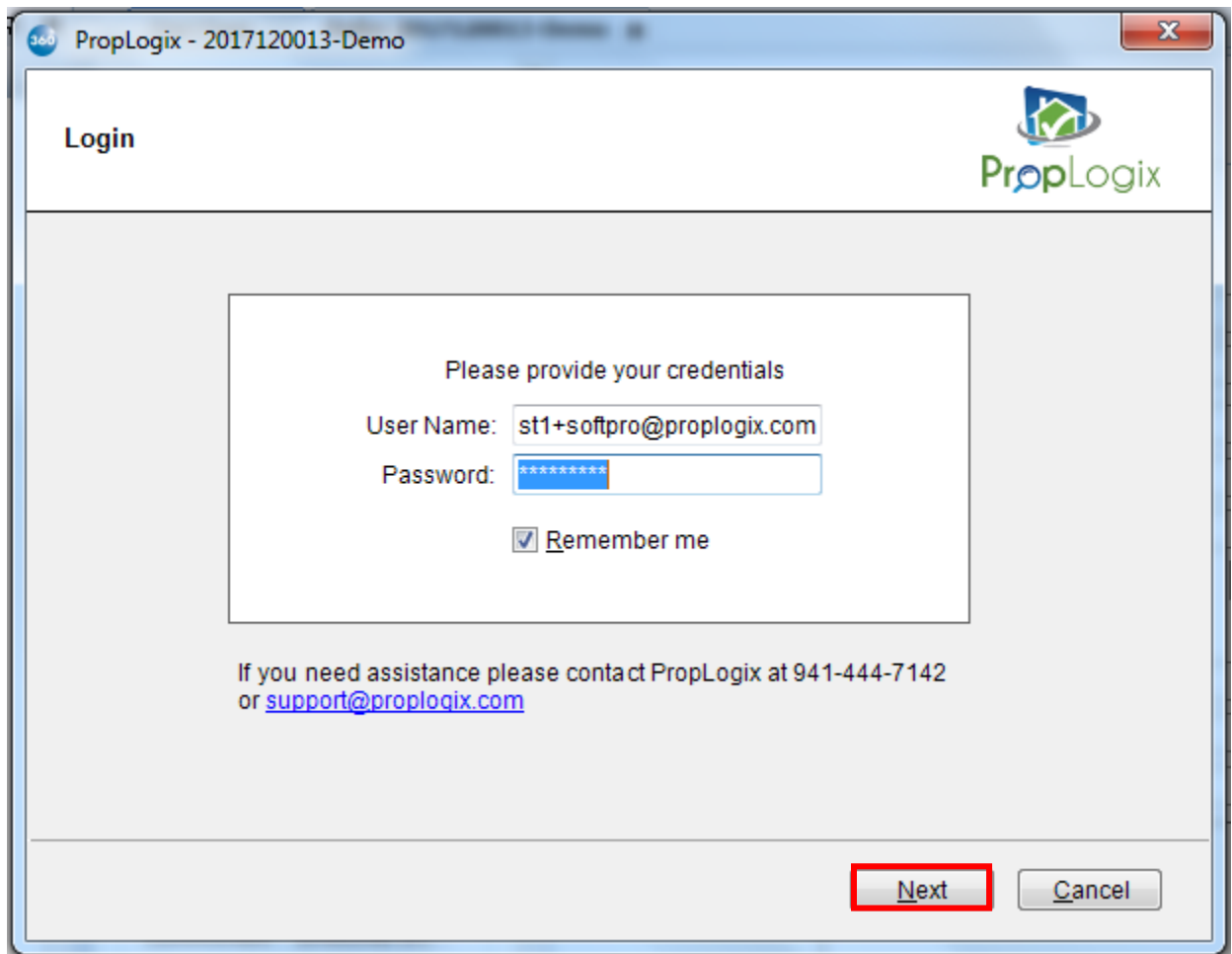
Figure 2 - Order Linking Screen

- 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.

Login

The **Login** screen requires you to enter a **valid user name** and **password**. Check **"Remember Me"** to login automatically when you launch the product in the future sessions. Click **Login** to continue.

Figure 3 - Login Screen

Submitting an Order

Order and Submit Screen

Screen Overview

After clicking **Next** on the Login screen, you will navigate to the **Order and Submit** screen where you can view and select all available product that you wish to order.

Figure 4 – Order and Submit Screen

On this screen, you will be able to select and order product(s) for a particular property. You will also have an option to add additional email contacts or specific comments for PropLogix pertaining to your order.

- The **Property** dropdown will list down all the properties available in your SoftPro order. You will be able to select the property for which you want to order products.
- Depending on your property state, the **County** dropdown will display all relevant counties for that particular state. You can select the relevant county from the dropdown.

- **Additional Owners** is a textbox which allows you to name any additional owners of the property. You can add multiple owners by separating the names by a comma (,) operator.
- The **Products** section allows you to select one or more products that you want to order for the selected property. Select the checkboxes for products/sub products to order accordingly.
- Click on **Rush Order** checkbox if you want to classify this order as a rush order.
- The **Due Date** field allows you to select a due date for your order.
- The **Attach Documents** button redirects you to a documents screen wherein you can browse, attach and delete any documents that you want to send to PropLogix along with your order.
- **Additional Email Contacts** allow you to add multiple contact email Ids for your order. You can add multiple email contacts by separating the Ids via a comma (,) separator.
- **Comments** is a free text field. Here, you can input any instruction, information or message that you want to send to PropLogix along with your order request.
- **Submit** button is enabled when you select the relevant county for your property and select at least one product to be ordered.
- **Back** button will redirect you to the Login screen.
- **Cancel** button will close the integration and take you back to your SoftPro order.

Municipal Lien Search Product

For ordering a Municipal Lien Search for your property, you can select the checkbox for Municipal Lien Search on the Order and Submit screen.

Figure 5 – Order and Submit Screen -> Municipal Lien Search Product

- There are 5 sub-products that you can order under Municipal Lien Search:
  - o Taxes
  - o Code
  - o Permits
  - o Public Works
  - o Special Assessments
- Select the desired sub-product(s) and click on **Submit** to send the order request to PropLogix.

Association Estoppels Product

For ordering an Association Estoppels for your property, you can select the checkbox for Association Estoppels on the Order and Submit screen.

Figure 6 – Order and Submit Screen -> Association Estoppels Product

- There are 2 options that you can select under Association Estoppels product:
  - o Buyer Approved
  - o In Collections
- Select the desired option and click on **Submit** to send the order request to PropLogix.
- The **question mark (?) icon** is for user's information regarding providing the Title Commitment along with the order request.

Survey Product

For ordering a Survey for your property, you can select the checkbox for Survey on the Order and Submit screen. The Survey product will be enabled on selection and clicking on the Survey hyperlink will redirect you to the Survey Information Screen.

Figure 7 – Order and Submit Screen -> Survey Product

- On the Survey Information screen, you will see the four tabs requesting certain information from the user. Populate necessary details from the **Survey Information Screen** and click on Submit to send the Survey request to PropLogix.

- **<u>Required:</u>** Here, you will be required to provide details regarding the **survey type, survey purpose, elevation certification and mortgage type.** All these fields are dropdowns and you can select your responses from the options available in the dropdowns.
- Click on the checkbox for **Title Commitment Review** if you want the title commitment to be reviewed.

Figure 8 – Order and Submit Screen -> Survey Product -> Survey Information -> Required Tab

- **Hard Copies:** Here, you can select the order contacts who should be receiving the hard copy of the survey report. PropLogix will be informed about the contacts who will be eligible to receive hard copy of the survey report.
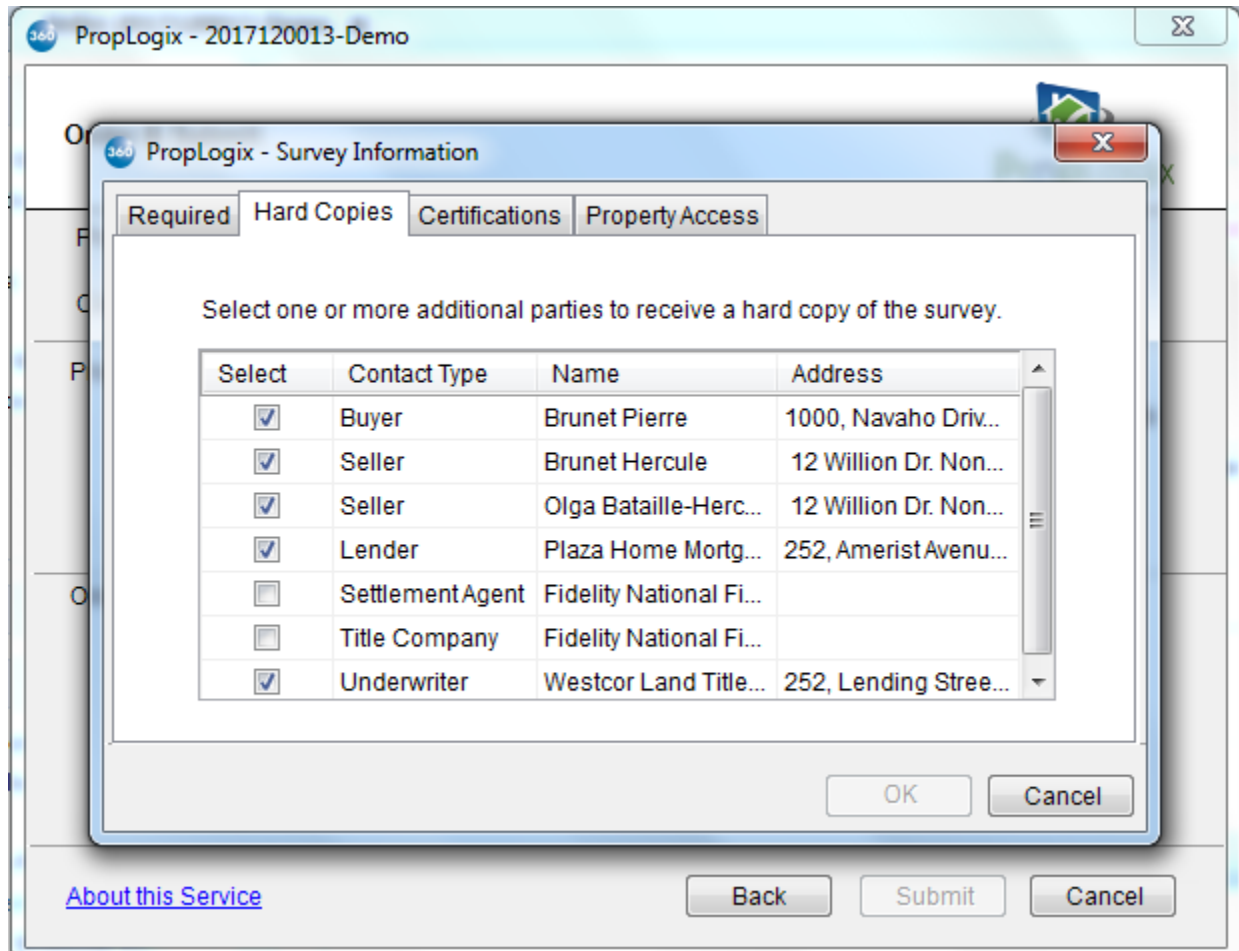
Figure 9 – Order and Submit Screen -> Survey Product -> Survey Information -> Hard Copies Tab

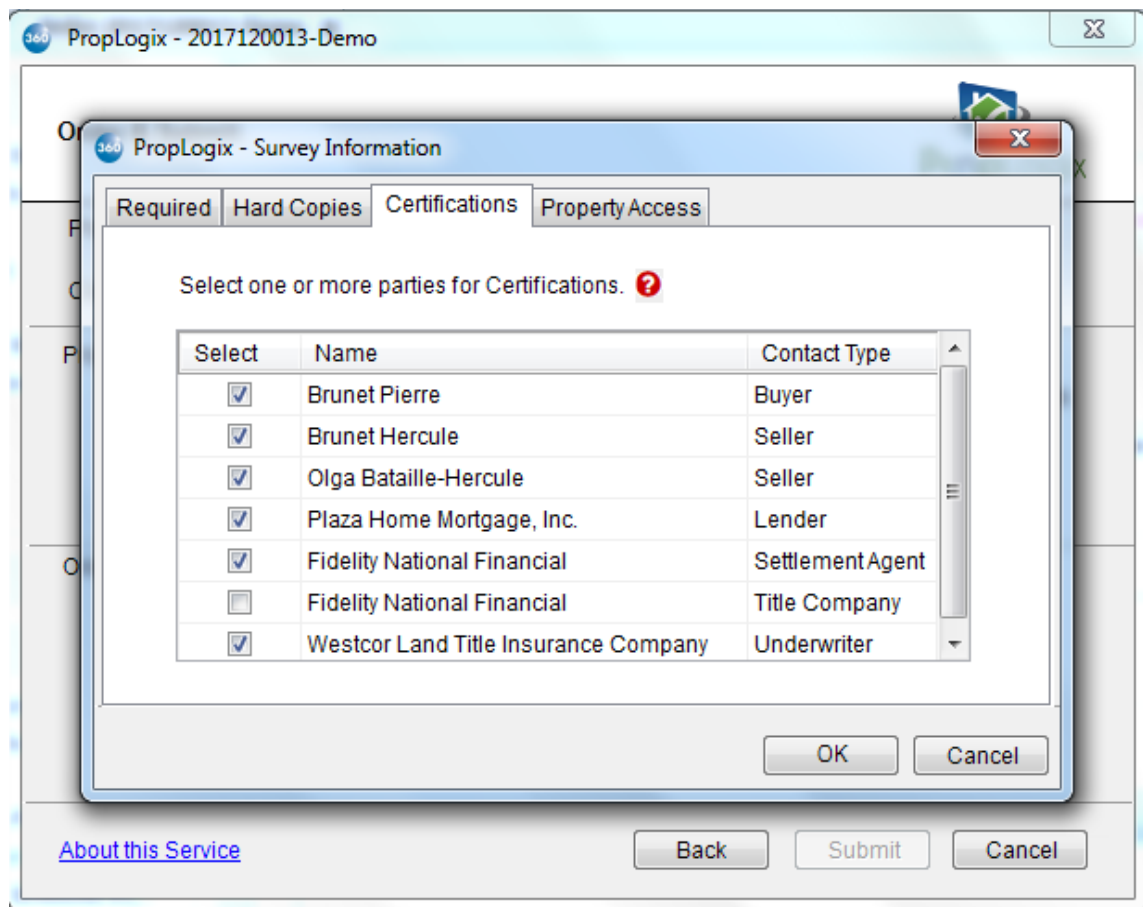- **Certifications:** Here, you can select the order contacts for certifications. PropLogix will be informed about the contacts who will be eligible for receiving certifications.

Figure 10 – Order and Submit Screen -> Survey Product -> Survey Information -> Certifications Tab

- **Property Access:** Here, you can provide the details for a contact (Name, Phone and Email) who has access to the property. The **Property Access Contact** dropdown lists the order contacts (buyers and sellers). **Survey Notes and Access Information** is a free text field for providing survey specific details. Click **OK** to save details provided on all tabs and close the survey information screen. Clicking **Cancel** will close the survey information screen without saving any details provided in any tabs.

Figure 11 – Order and Submit Screen -> Survey Product -> Survey Information -> Property Access Tab

Add Documents Section

On clicking **"Attach Documents"** on the Order and Submit screen, you will be navigated to the "Attach Documents" screen where you can attach documents to be sent along with your ProForm order to PropLogix. You can **browse** and select the document from your system, you may select any documents **already attached** to your ProForm order or you can click **Delete** to cancel any attached document. You can select up to 4 documents and assign a unique **description** against each document. Click **OK** to attach the documents or click **Cancel** to return to order and submit screen without attaching the documents.

Figure 12 – Order and Submit Screen -> Attach Documents

Figure 13 – Attach Documents

Submit Order Data

Once you have selected the desired products and attached the documents to be sent to PropLogix, click on **Submit** button. This will send all your order data and documents to PropLogix to work on processing your order. The status of your transaction will be visible in the SoftPro 360 queue going forward.

Figure 14 – Submit Order Data
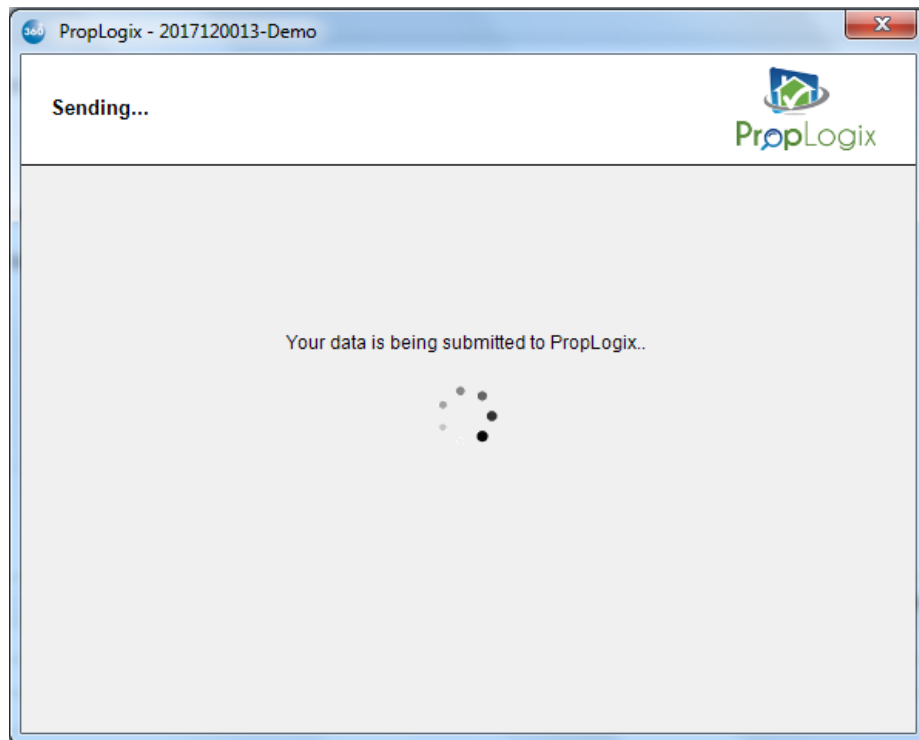
Figure 15 – Submit Order Data -> Submit in progress
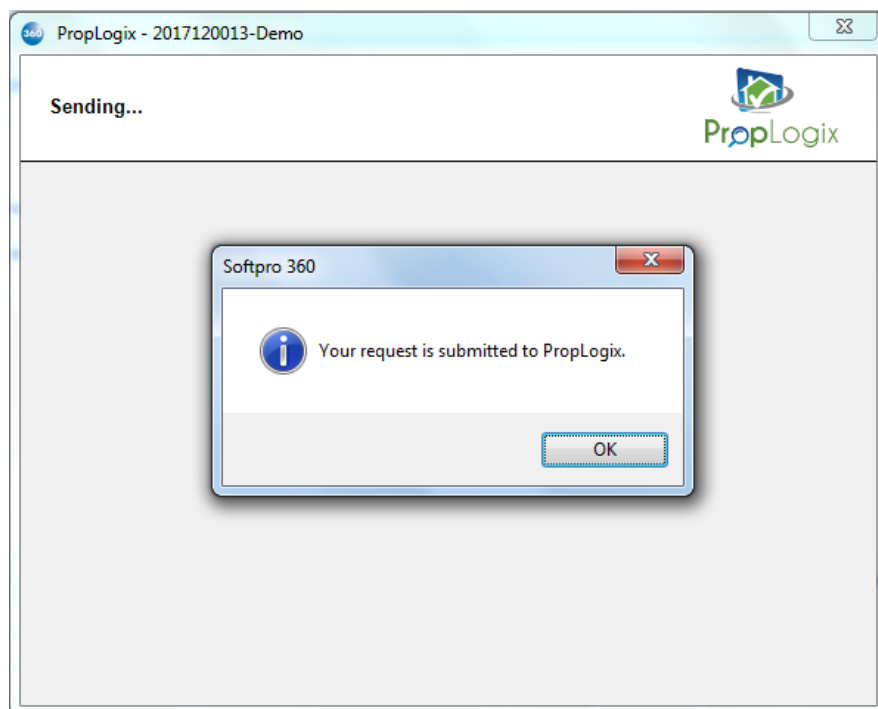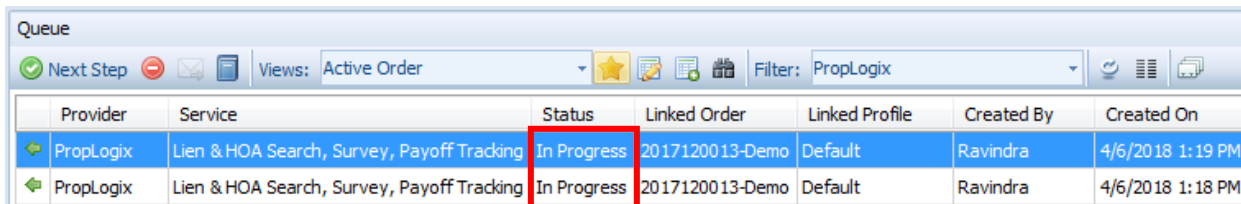
Figure 16 – Order Submitted to PropLogix

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.
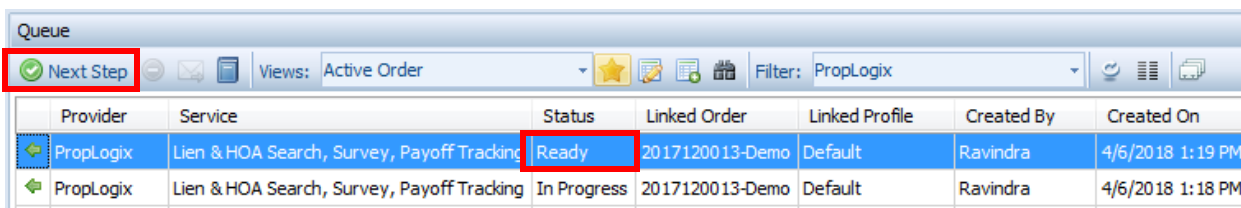

Figure 17 - SoftPro 360 Queue: After Submitting an Order

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

Figure 18 - SoftPro 360 Queue: When 360 Receives Documents

- On click of **Next Step,** you may proceed to the Review Screen and review the title documents sent by PropLogix.

Review Screen - Accepting Title Documents

From the **Review** screen, you will be able to view, copy and accept the documents sent from PropLogix. The accepted documents will be saved in your SoftPro order attachments:
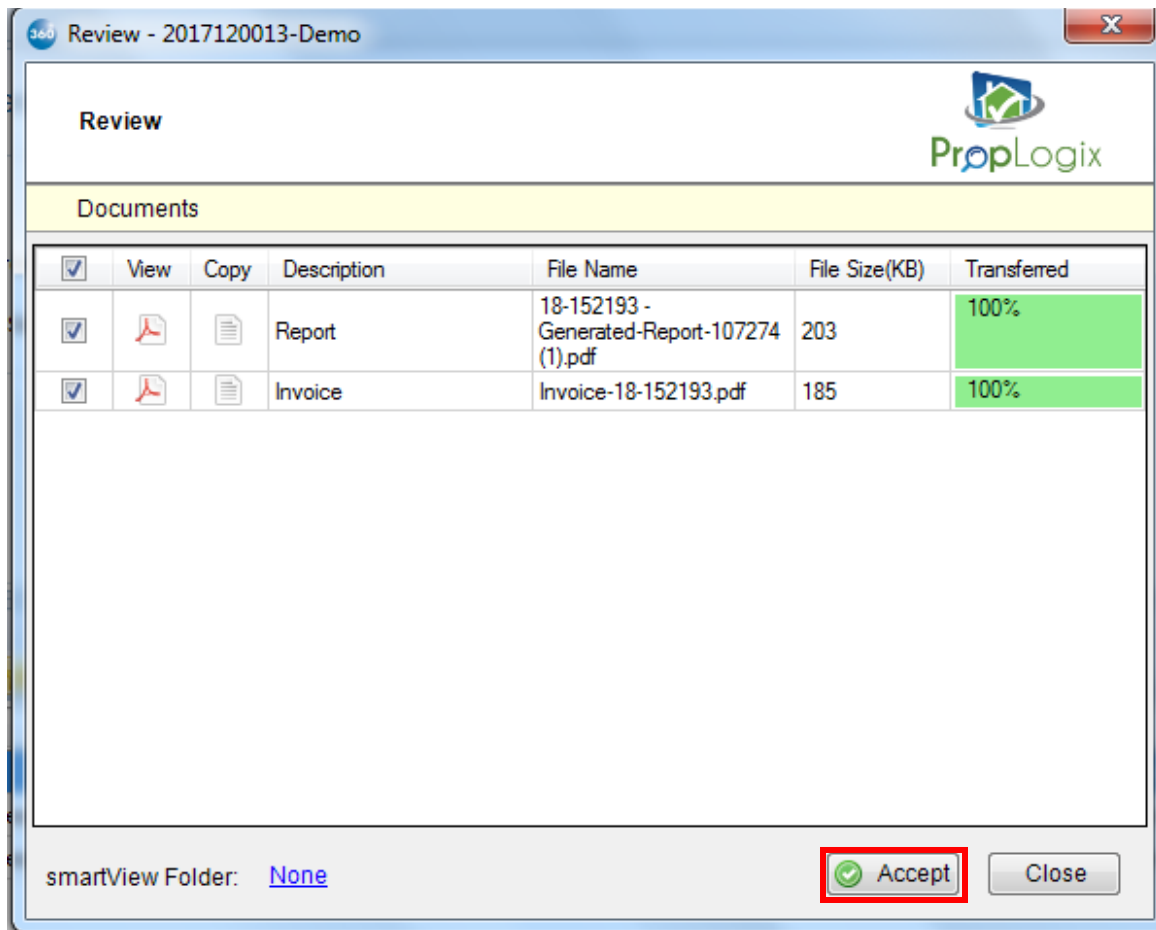

Figure 193 - Review Screen

- The Review screen allows document(s) to be viewed by clicking the **View** icon. Click **Accept** to add the document(s) to the linked ProForm order. The document(s) will be available from within the linked ProForm order by clicking on the **Attachments**. If the documents should not be accepted, the Cancel button closes the Review screen and no documents will be accepted. On clicking Accept, the transaction status is changed to **Accepted** in the 360 transaction queue.

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.

Figure 204 – SoftPro 360 Queue: When 360 have accepted Documents

- On click of 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 be auto logged in to the **"Activity Details"** screen. Click "Update Order" button to make your updates to the order.
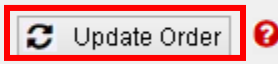

Figure 215 – Login Screen during Update Order

On the Update Order screen, you will see the below items which you can update on your ProForm order:

- o **Rush Order –** Checkbox to select if this is a rush order.
- o **Settlement Date** – Provide the new Settlement Date.
- o **Due Date** – Provide the new Due Date.
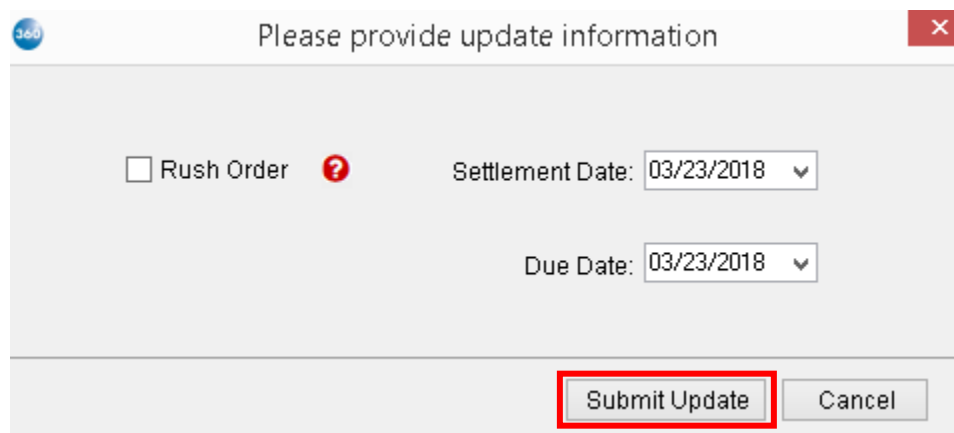- The order will be submitted to PropLogix on click on **Submit** button.

Figure 226 – Update Order Screen

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

Figure 23 - SoftPro 360 Queue: After Submitting the update order request

Cancel Order

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

Figure 24 - SoftPro 360 Queue: After Submitting the order request

- The Cancel dialog will prompt you to confirm that you want to cancel this order. Click **OK** to confirm the cancellation. Order will be cancelled and the status will be changed to "**Canceled**" in the 360 queue.
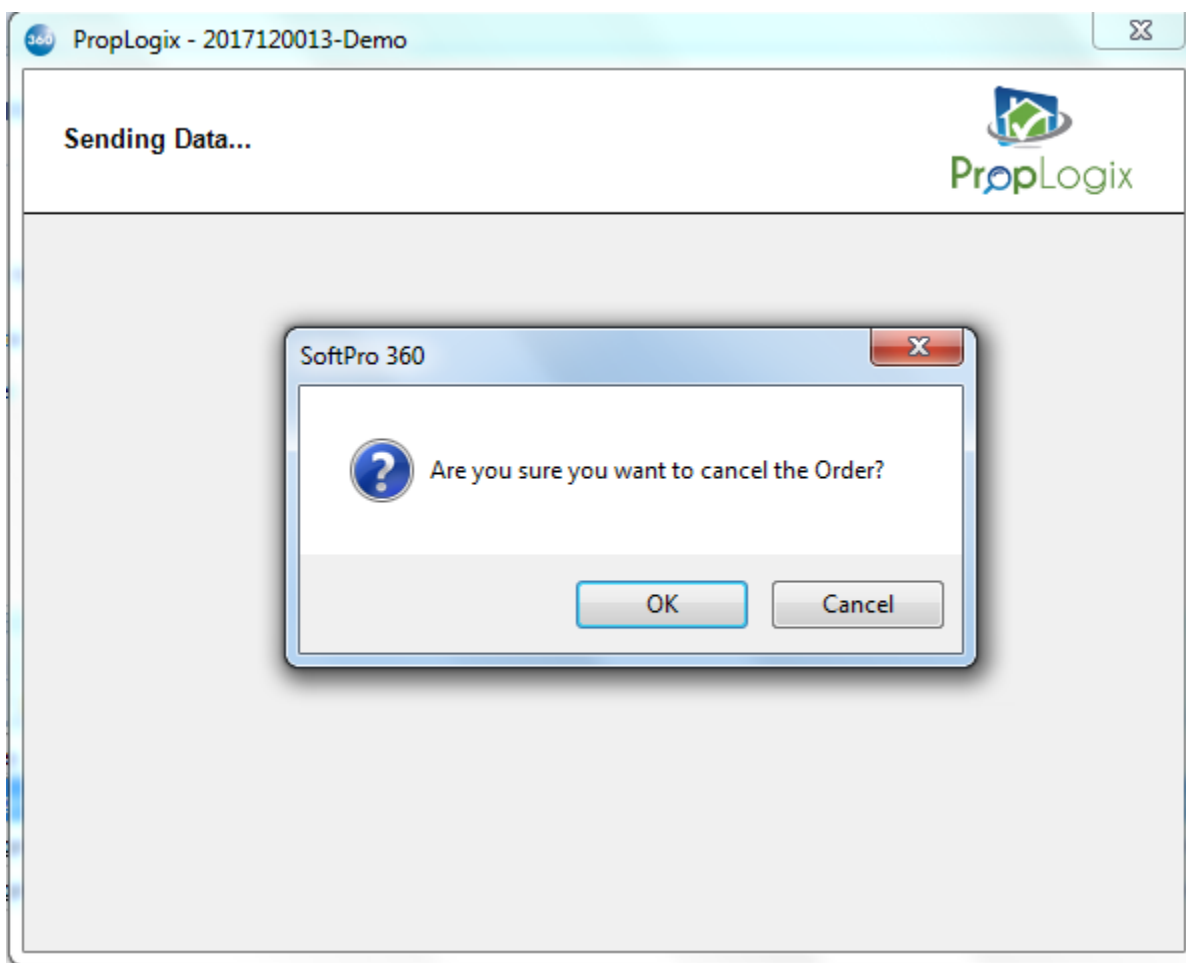

Figure 25 – Cancel Screen

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

Figure 26 – SoftPro 360 Queue: After cancelling the order