

# TrackerPro

## **TitleWave Integration**

**User Guide** 

Revised: 12/10/2019

### Identification

You will identify yourself to the TitleWave Integration by using an E-Mail address. Typically, this will be your own E-Mail address, however it is possible that multiple people at your organization share an E-Mail Address.

Since you are authenticating with an E-Mail address only, without a password, you will have to verify that you are permitted to use that E-Mail address. We will do that by sending a 6-digit code to that E-Mail Address when you first try and use that E-Mail Address.

Assuming you have access to that mailbox directly you can enter the code yourself, however if that mailbox belongs to somebody else you must get them to give you the code.





#### A few notes

• This integration includes the entire Fidelity family including TitleWave and the Underwriters such as Fidelity, Commonwealth, Chicago, and others.

### **New TitleWave Orders**

- Create your order for TitleWave in the Vendor Orders section of the Application just as you would with any other Vendor Order. The Vendor should be named 'TitleWave' and should be set to Deliver Via: DirectWeb. When you click Order on this screen, or your send the order using the Send Form, the TitleWave integration windows will open automatically.
- 2) Step 1 of the TitleWave integration will prompt you for the State, Company, County, and the Order Type.

If your E-Mail Address gives you access to multiple Companies, you should ensure the proper company is chosen. There is an option to set the Company as the Default, which means for this installation of TrackerPro that Company will automatically be chosen.



💀 TitleWave Order Fo	rm		-		×
TitleWave Orde	er Form - Step 1			User G	uide
Title Number ISS-1612	E-Mail Address breisner@trackerprollc.com				Edit Save
State Company County Order Type	NY Abstract Thought ZZZ [Integration Testing] Nassau Please Choose	Def	ault		
Cancel	Please Choose Commercial Buy/Sel Commercial Refnance EC Commercial Perhase EC Commercial Perhase EC Residential Perhase EC Residential Perhase Residential Refnance Residential Refnance <1 Million			Conti	nue

The available Order Types will vary based upon the Company, the State, and the County, and you will have to select the correct Order Type each time you place an order.

 Step 2 of the TitleWave integration will show you all the information that will be passed to TitleWave to create the order. If all the information is accurate you can click Order to proceed. Most of the fields are self-explanatory but please look at the next page for some detailed information about some of the fields.

🔢 TitleWaveOrderFor	mStep2							-	$\Box$ $\times$
TitleWave Orde	er Form - Step 2								User Guide
Primary Order informa	ation	Products		Properties					
Email	ben@trackerprollc.com	Title Search Report with Taxes	Add	123	test road		Mass	apequa	Add
Brand	Please Choose 🗸 🗸		Remove						Remove
Smart View #									
Back Title #				Street # 123	Street Name	est road	04-4- NV	County Nassau	~
Sale Price	12/1//2019 •	Product Table L D. A. M. T		Sub-Division	ua Tart Ordan Candani		state NY ZIP	11/58	
oure mile	\$600,000.00	Title Search Report with Taxes		Condo Name	Test Order Condom	nums D	eed Page		
			~ .	Building		PI	lat Condo Book		
Parties	"We load Owners/Buyers based on the tr	ansaction type in TrackerPro, not the Order Type chosen o	n Step I	UnitNumber	Unit 2	PI	lat Condo Page		
Oswald Owner		Seller	Add	Township	Oyster Bay	Re	ecorded Plat		
My Buying Company		Buyer	Remove	TaxIdentifier	Sec. 3 Block 23 Lot	121 Re	ecorded Lot		
				Section	3	Pł	hase Number		
				Block	23	M	1ap Number		
				Lot	121	R	ange		
First Name Oswald	Middle Name	Last Name Owner	-	Quarter Section		Ce	ertificate Number		
Suffix	Status		1	Qu Qu secuon			racinsu. Number		
Type Seller	Entity/Individual Individual N	× SSN	]	Torrens	Abstract	New Construction	New Plat	Vacant Land	
Loans				Notes					
450000.00	Friday Fun Loans		Add						
45000.00	Friday Fun Loans		Remove						
Amount	\$450,000.00 Lender Name Friday Fun Loa	ns Loan #	1						
Cancel			_		*You can a	ttach documents after	the order has been proc	cessed	Order

**Brand** – This dropdown will contain the Underwriters that TitleWave has associated with your account, which they refer to as 'Brand'. It will attempt to automatically choose the Underwriter for the current file, but that will only work if the name is the same. For Example if you have 'Chicago Title Guarantee

Company' selected in TrackerPro and their system lists 'Chicago Title Insurance Company' then it will not automatically select that Underwriter and you should manually choose it.

**Products** – This area allows you to select which Product(s) you want to order from TitleWave. We will attempt to automatically populate this list based on what search items are selected in the Vendor Order in TrackerPro. If you have any items selected in TrackerPro that are not valid for TitleWave then it will prompt you to manually choose that item. Please note that the name must match exactly.

Primary Order info	ormation	Products	
Email	ben@trackerprollc.com	Please Choose	Add
Brand	Chicago Title Insurance Company	~	Remo
Back Title #			
Due Date	11/13/2019 -		
Parties	intervave integration	×	Add
Parties	incervave integration	X	
Parties Oswald Owner	nuewave integration	×	Add
Parti es Oswald Owner Dan Kieman	Failed to automatically add all	I search(es) from TrackerPro. The in the TrackerPro list of Search Item, but	Add Remov
Parties Oswald Owner Dan Kieman	Failed to automatically add all following items are included do not have matching produc	I search(es) from TrackerPro. The in the TrackerPro list of Search Item, but cts in TitleWave:	Add Remov
Parties Oswald Owner Dan Kieman	Failed to automatically add all following items are included do not have matching produc Tax Search	X I search(es) from TrackerPro. The in the TrackerPro list of Search Item, but cts in TitleWave:	Add Remo
Parties Oswald Owner Dan Kieman	Failed to automatically add all following items are included do not have matching produc Tax Search Please make sure the product	I search(es) from TrackerPro. The in the TrackerPro list of Search Item, but cts in TitleWave:	Add
Parti es Oswald Owner Dan Kieman	Failed to automatically add all following items are included do not have matching produc Tax Search Please make sure the products to order	I search(es) from TrackerPro. The in the TrackerPro list of Search Item, but cts in TitleWave: s list accurately represents what you want	Add
Parties Oswald Owner Dan Kieman First Name Oswa	Failed to automatically add all following items are included i do not have matching produc Tax Search Please make sure the product to order	I search(es) from TrackerPro. The in the TrackerPro list of Search Item, but ts in TitleWave: s list accurately represents what you want	Add Remo

**Parties** – This area will list all the Owners or Buyers from TrackerPro depending on the type of Transaction. Please note that it will populate them based upon the Transaction Type in TrackerPro as determined by the Policies in TrackerPro. If it is a Purchase Transaction, we will load the Owners from TrackerPro as 'Sellers' and the Buyers from TrackerPro as 'Borrowers'. If it is a Refinance Transaction, we will load the Owners from TrackerPro as 'Borrowers'. This behavior does not depend on the Order Type from Step 1.

**Properties** – Most of these fields are not relevant for most municipalities/transactions

123	t	est mad	Massapegua	Add
120				Remove
Street #	123	Street Name test road	County Nassau 🗸	
	Massapequ	a	State NY Zip 11758	
Sub-Divi		Test Order Condominums	Deed Book	
Condo N			Deed Page	1
Building			Plat Condo Book	
		Unit 2	Plat Condo Page	1
		Oyster Bay	Recorded Plat	
		Sec. 3 Block 23 Lot 121	Recorded Lot	
		3	Phase Number	
Block		23	Map Number	
		121	Range	1
Quarter			Certificate Number	
Qtr Qtr S			Plat Instr. Number	

### **Current TitleWave Orders**

Once your order has been created within TitleWave you will now see a Manage TitleWave Order button on the Vendor Orders screen when you have that order selected. Clicking this button will allow you to manage your existing order so that you can:

- 1) Send TitleWave a note
- 2) Send TitleWave a document
- 3) Order a Continuation (aka Bringdown)
- 4) Easily jump to this order on TitleWave's Website.

Sending TitleWave a note or a document is as simple as it sounds. If a TitleWave employee adds a note to your order you will receive that note in an email.

When this window opens, the Order a Bringdown section will be populated with all the Products for this file that you could possibly order a Bringdown/Continuation for. You could select the Product if there were multiple Products and choose the type (for example: Closing Continuation). The Due Date/Time will populate automatically based on the Scheduled Closing.

Please note that we only allow 1 TitleWave order for each file in TrackerPro. If you create a new Vendor Order in TrackerPro for TitleWave on a file that already has one, whether you Order the search or click Manage TitleWave Order it will bring you to the Manage TitleWave Order

Title Search		N	ame tleWave			Ordered 11/5/2019	Received
New Ord	er: 🕨 *		Delete:	×	Attac	hments:	₽
Service Cat.:	Title Search			~	Ordered Date	11/5/2019	
Vendor Code	TW			V 🖉 💌	Due Date:	11/13/2019	
Vendor Name	TitleWave			\ \	Received:		
Ma	anage TitleWa	ave Order					
Service			Rece	ived C	rder Details		
X Tax Search	ı		$\sim$				62
×			$\sim$				69
<u>O</u> rder	Įnvoice	<u>S</u> etup	<u>D</u> ocuments	Setup Co	ost <u>E</u> stimates		E <u>x</u> it
<u>O</u> rder TitleWave Mana	Invoice Interv Ige Order Form anage Order	<u>S</u> etup Form	<u>D</u> ocuments	Setup Co	ost <u>E</u> stimates		E <u>x</u> it
Order TitleWave Mana itleWave M de Number 5-1605	Invoice	<u>S</u> etup Form	Documents	Setup Co	prolic.com		E <u>x</u> it User Guide Edit Save
Order	Invoice age Order Form	<u>S</u> etup Form	Documents	Setup Co	prolic.com		Exit User Guide Edit Save
Order TitleWave Mana itleWave M itle Number 5-1605 Id a Note New Note	Invoice age Order Form anage Or der	<u>S</u> etup Form	Documents	Setup Co	prolic.com		Exit User Guide Edit Save
Order TitleWave Mana ite Number 5-1605 Id a Note New Note Comment Comments	Invoice	Setup	Documents	Setup Co	prolic.com		Exit
Order TriteWave Mana itle Wave Mana itle Wave M te Number itle Number da Note tach a Document tach a Document comments der a Bringdown	Invoice	Setup	Documents	Setup Co	prolic.com		Exit
Order TitleWave Mana itleWave Mana itleWave M tech Number S-1605 dd a Note S-1605 dd a Note Comments Comments Comments Comments Comments Comments	Invoice ge Order Form anage Order	Setup Form	Documents	Setup Co	prolic.com		Egit User Guide Add Note Browse Attach Document
Order TitleWave Mana	Invoice	Setup Form	Documents	Meil Address Meil Address reisner@tracket	prole.com		Exit
Order TitleWave Mana TitleWave Mana Se Number Se Number Se Number Se Note Se Numerit Comments Comments Ger a Bringdown Product Ippe Dage Date	Invoice Invoic	Setup Form	Documents b	-Mail Address	prolic.com		Etxit
Order TitleWave Mana TitleWave Mana Safeto S	Invoice	Setup Form	Documents           E           B           B           B           B           B           B           B           B           B           B           B           B           B           B           B           B           B           B           B           B           B           B           B           B           B           B           B           B           B           B           B           B           B           B           B           B           B           B           B           B           B           B           B           B           B           B           B           B           B           B           B           B	-Mail Address -Mail Address reinner@tracke	prolic.com		Edut Add Note
Order  TriteWave Mana  itle Wave M  itle Number  itle Num	Invoice	Setup Form	Documents	Mail Address Mail Address reiserer@tracker	Prole.com		Exit

Application Vendor Services

screen. This is very convenient for Contin orders because TrackerPro will by default create a new Vendor Order, however from TitleWave's point of view it is not a new order and you need to Order a Bringdown for that search.

There are many aspects of the TitleWave system that are not currently supported through integration. This includes things such as modifying basic information about the file (name, address, etc...), converting a Title Search Report into a Commitment and then into a Policy, as well as Ordering additional products on an order. For these reasons we provide a button to easily bring you right to TitleWave's website so that you can do those tasks and more.