



TrackerPro
TitleWave Integration
User Guide

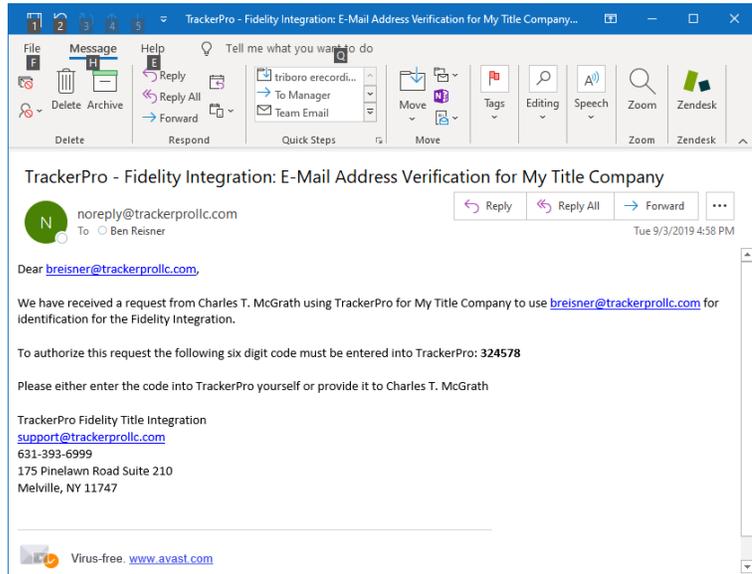
Revised: 12/10/2019

Identification

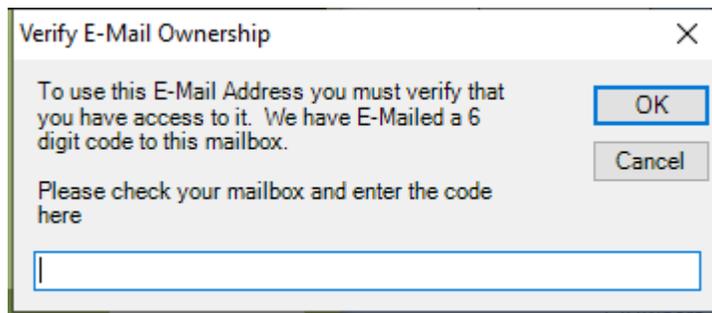
You will identify yourself to the TitleWave Integration by using an E-Mail address. Typically, this will be your own E-Mail address, however it is possible that multiple people at your organization share an E-Mail Address.



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.

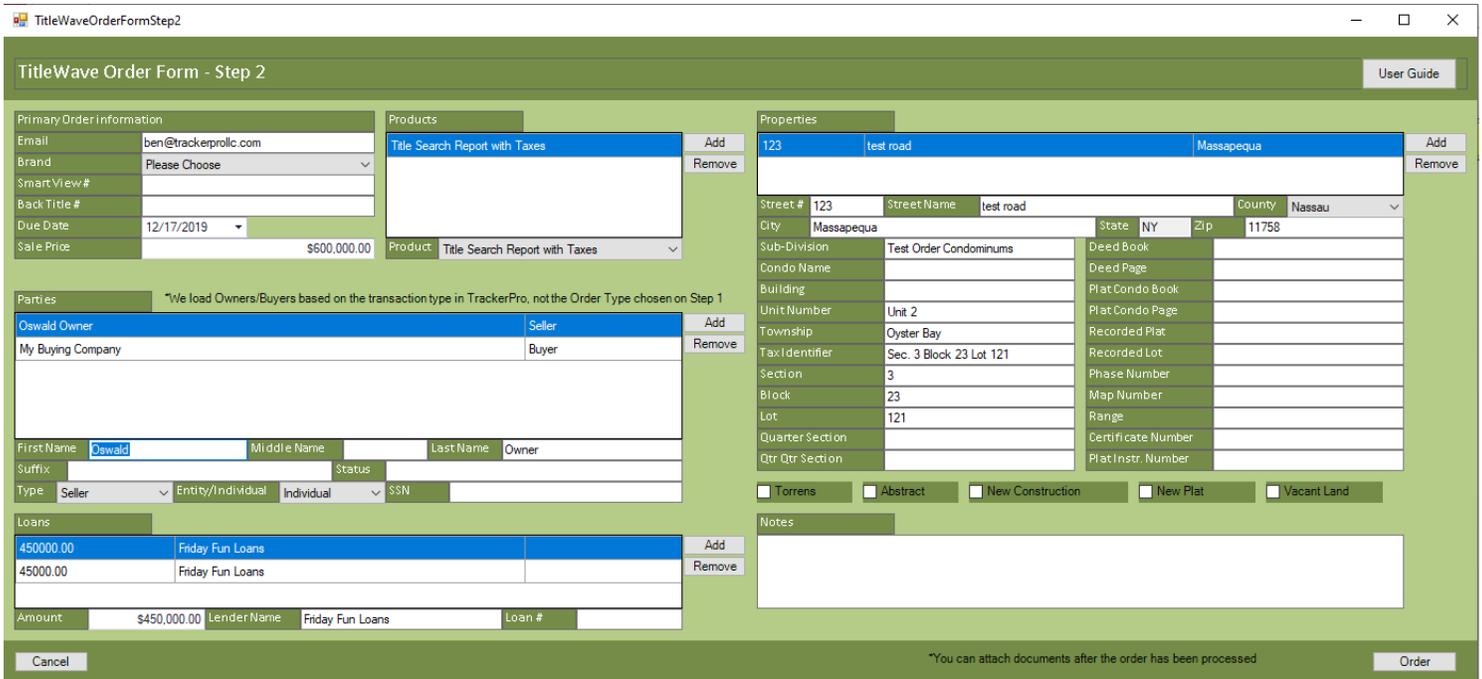
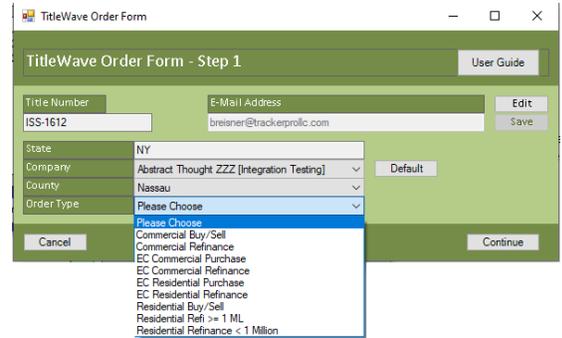
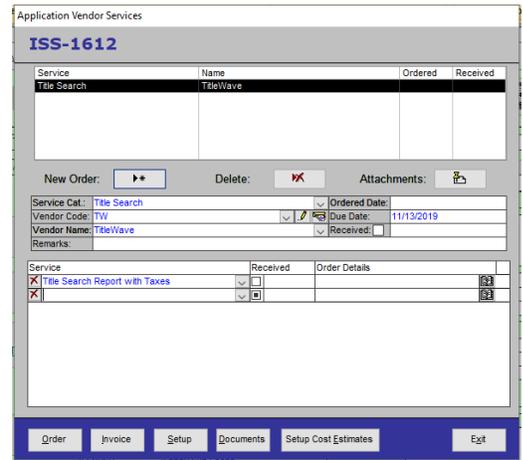
New TitleWave Orders

- 1) 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 you 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.

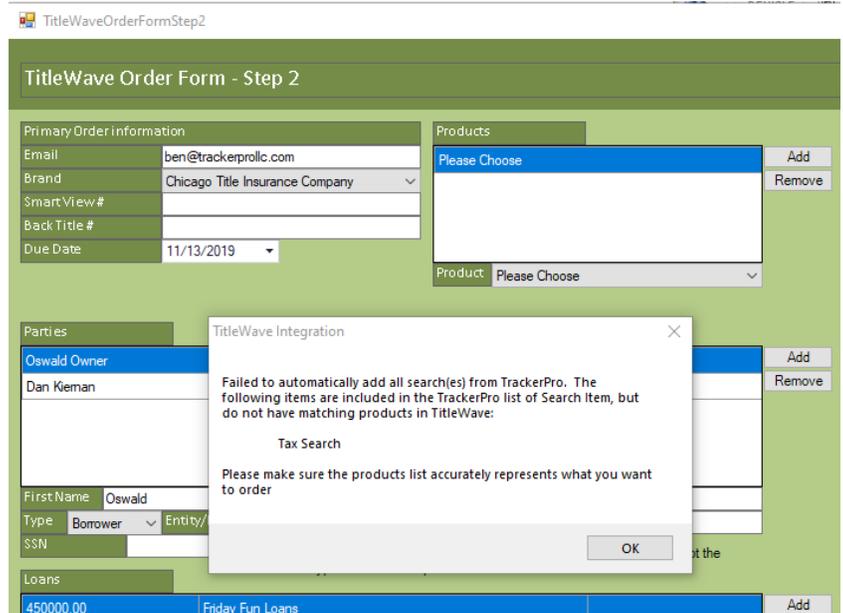
The available Order Types will vary based upon the Company, the State, and the County, and you will have to select the correct Order Type each time you place an order.

- 3) 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.



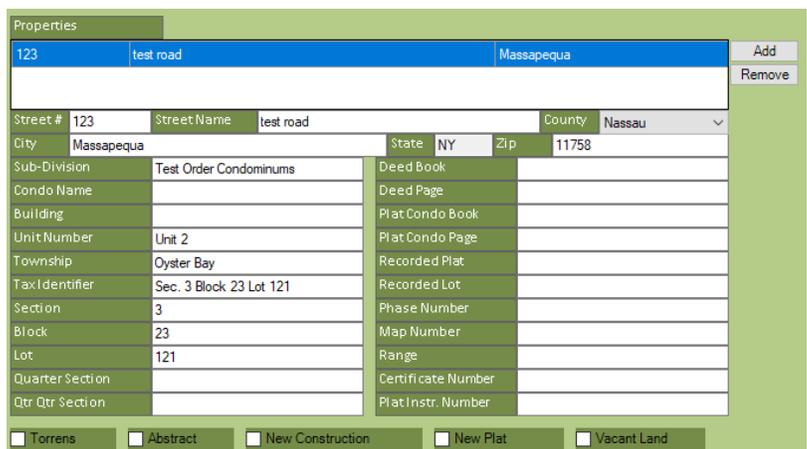
Brand – This dropdown will contain the Underwriters that TitleWave has associated with your account, which they refer to as ‘Brand’. It will attempt to automatically choose the Underwriter for the current file, but that will only work if the name is the same. For Example if you have ‘Chicago Title Guarantee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



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



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 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.

