

# Municipal Data Services User Guide

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## History

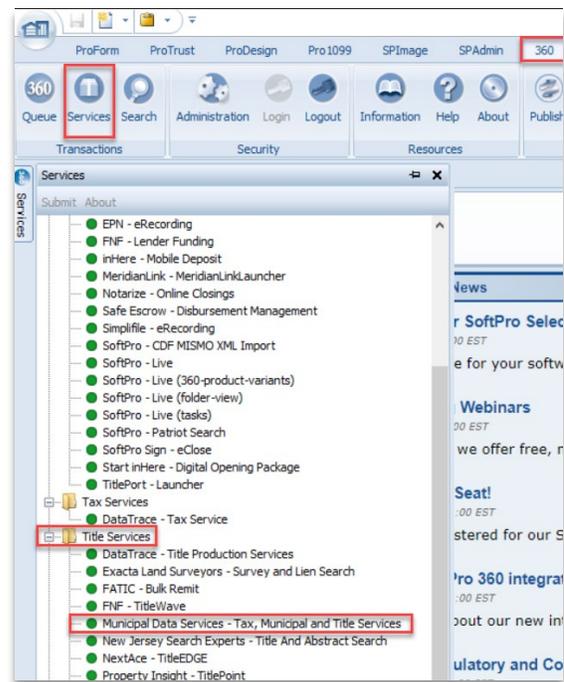
Date	Version	Details
March 2023	1.0	Initial User Guide

## Introduction

Our mission at Municipal Data Services is to provide our clients with accurate and accessible information in a timely manner in preparation for the transfer of real properties on an individual or corporate scale. We are always striving to deliver products and solutions that help title agents reduce turn time and provide these services with our strong commitment to customer service, administered by our dedicated, highly trained staff and our emphasis on individualized service.

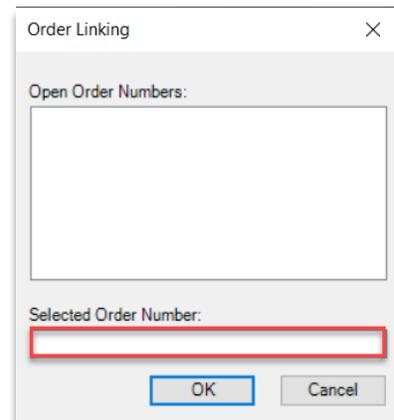
## Accessing From The 360 Services Menu

From the **360 Services** menu, double-click **Municipal Data Services–Tax, Municipal and Title Services** located under the **Title Services** folder. This opens the **Order Linking** screen.



## Select a ProForm Order for the Search

A ProForm Order must be linked to each transaction. If a ProForm order(s) are not open, the **Order Linking** dialog box displays. Enter the order number for the file to be linked in the **Selected Order Number** field and click **OK**.



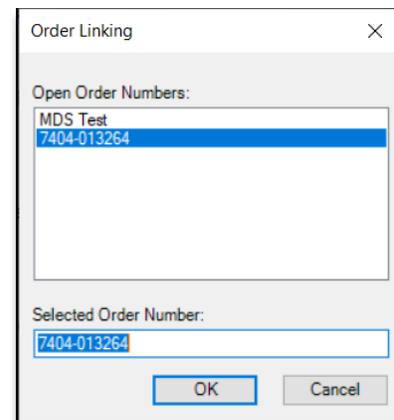
Order Linking

Open Order Numbers:

Selected Order Number:

OK Cancel

If multiple ProForm orders are open when the integration is accessed, the **Order Linking** dialog box displays, showing the **Open Order Numbers**. Select the order number to be linked to the transaction and click **OK**.



Order Linking

Open Order Numbers:

MDS Test  
7404-013264

Selected Order Number:

7404-013264

OK Cancel

If only one ProForm order is open when the integration is accessed, the transaction automatically links to that order and the **Order Linking** dialog box does not display.

## Welcome Screen

The **Welcome** screen provides a summary of the product and a link to the Municipal Data Services website.

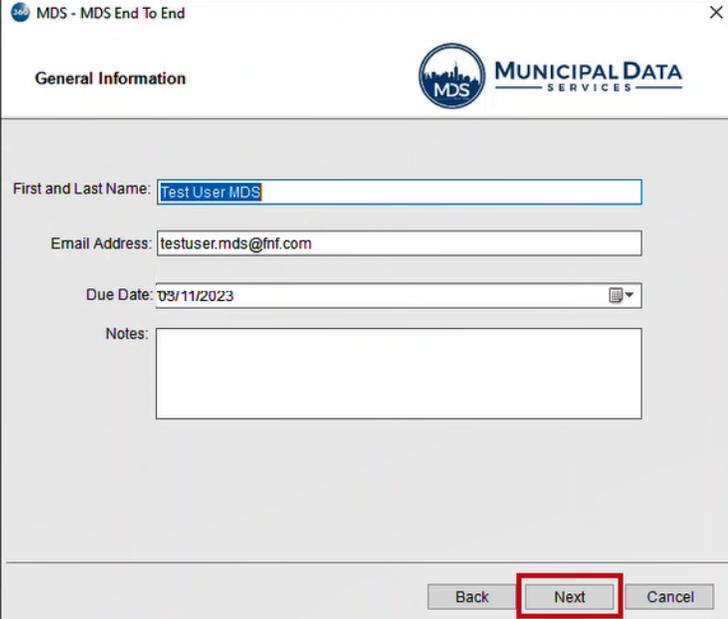
Checking the **Skip Welcome Screen** check box bypasses the Welcome screen in future sessions. Click **Next** to navigate to the **Login** screen.



The screenshot shows a window titled "MDS - MDS End To End" with a close button (X) in the top right corner. The window contains the "Welcome" screen. At the top left, it says "Welcome". To the right is the "MUNICIPAL DATA SERVICES" logo. Below the logo is a paragraph of text: "Our mission at Municipal Data Services is to provide our clients with accurate and accessible information in a timely manner in preparation for the transfer of real properties on an individual or corporate scale. We are always striving to deliver products and solutions that help title agents reduce turn time, and provide these services with our strong commitment to customer service, administered by our dedicated, highly trained staff and our emphasis on individualized service." At the bottom of the window, there is a checkbox labeled "Skip Welcome Page" and two buttons: "Next" and "Cancel". The "Skip Welcome Page" checkbox and the "Next" button are highlighted with red boxes.

## Login Screen

The **Login** screen requires the users first and last name, e-mail address and a due date. Notes can also be added in the Notes field.



The screenshot shows a window titled "MDS - MDS End To End" with a close button (X) in the top right corner. The window contains the "General Information" screen. At the top left, it says "General Information". To the right is the "MUNICIPAL DATA SERVICES" logo. Below the logo are four input fields: "First and Last Name:" with the text "Test User MDS", "Email Address:" with the text "testuser.mds@fnf.com", "Due Date:" with the text "03/11/2023" and a calendar icon, and "Notes:" with an empty text area. At the bottom of the window, there are three buttons: "Back", "Next", and "Cancel". The "Next" button is highlighted with a red box.

Click **Next** to navigate to the **Property Information** screen.

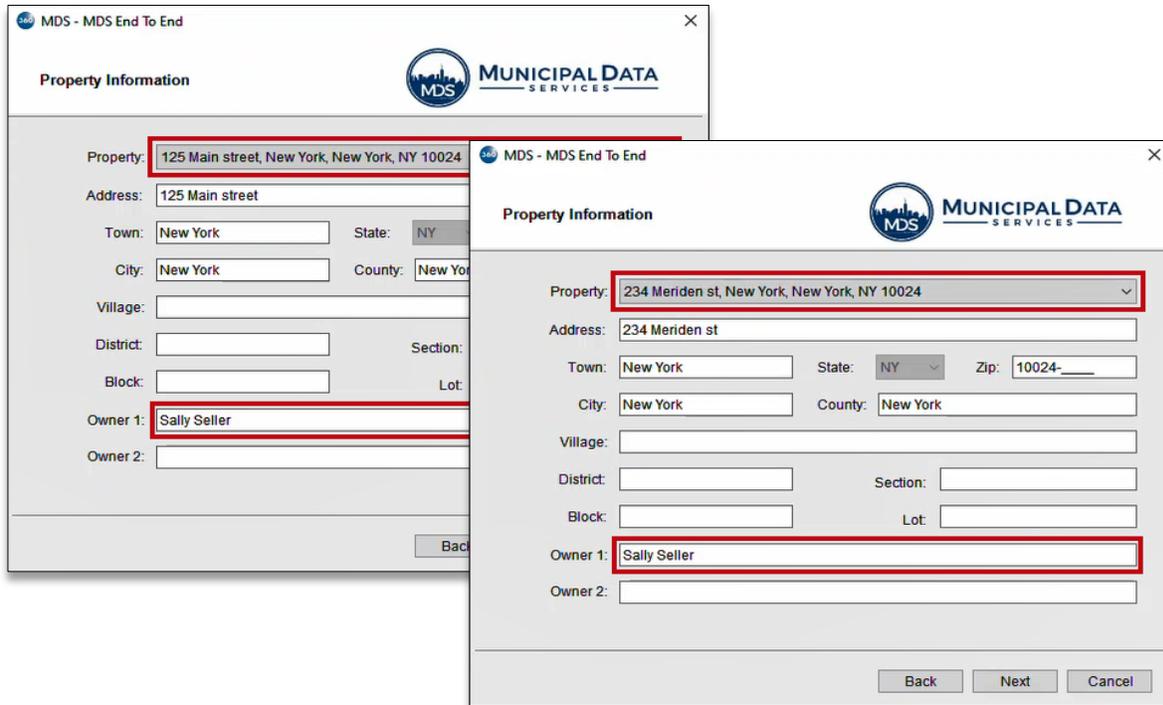
## Property Information Screen

The **Property Information** screen allows the user to select a property (if multiple properties exist on the order).

- **Address:** At least one property should be selected. The first property listed in the order should be selected by default. The user can submit a transaction for multiple properties at once. All properties are included under one transaction.
  - Selecting a property automatically displays the corresponding property information in the editable fields: **Address, Town/City, State, ZIP, County, Village, District, Block, Section, Lot.**

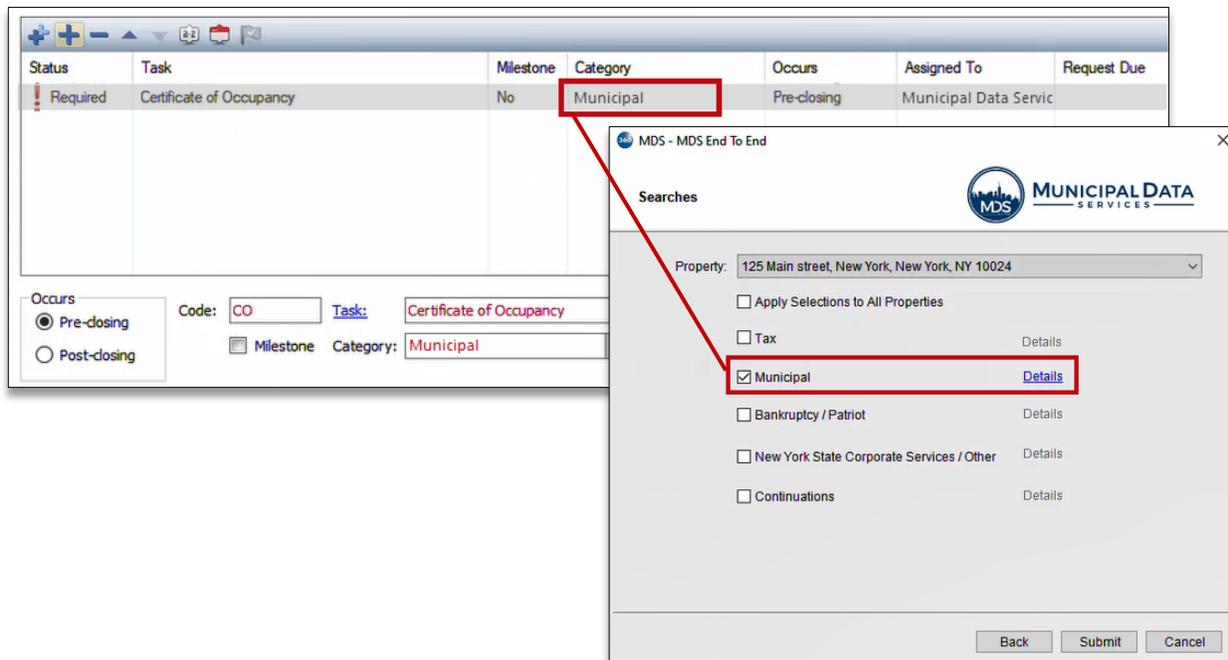
- **Owner 1:** Pulls seller information for 1stSeller added to the ProForm order.
  - Seller name(s) if transaction is a purchase OR Buyer/Borrower name(s) if it's a refinance.
  - If Seller is Organization, the organization name pulls through but not associated people.
- **Owner 2:** Pulls seller information for 2ndSeller added to ProForm order.
  - **Seller** name(s) if transaction is a purchase OR **Buyer/Borrower** name(s) if it's a refinance.
  - If **Seller** is **Organization**, the organization name pulls through but not associated people.

**NOTE:** If different owner names are necessary for each property, the owner names can be manually entered in the **Owner 1** and **Owner 2** fields. The owner names do not automatically update when changing the property in the drop down on the **Property Information** screen.



## Searches Screen

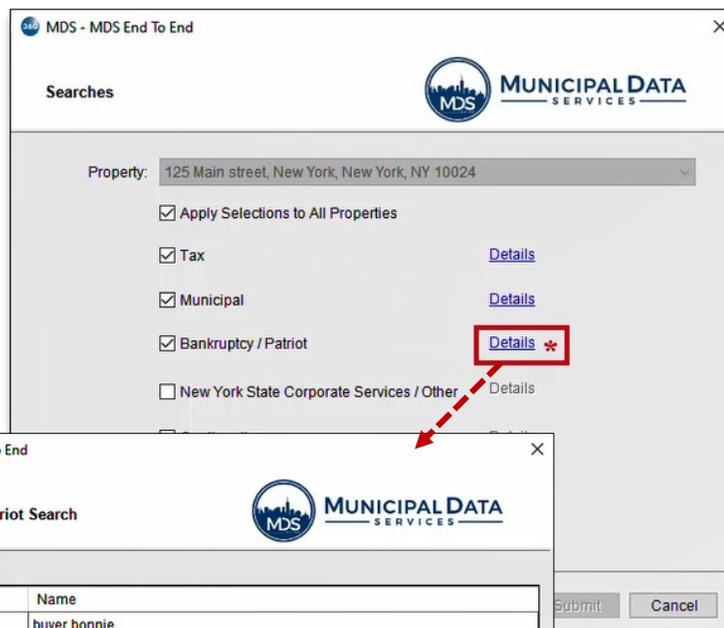
The **Searches** screen displays the various search options. If information was added to the **Requested Tasks** screen for the options in the ProForm order, the corresponding boxes are checked, and the **Details** link is active.



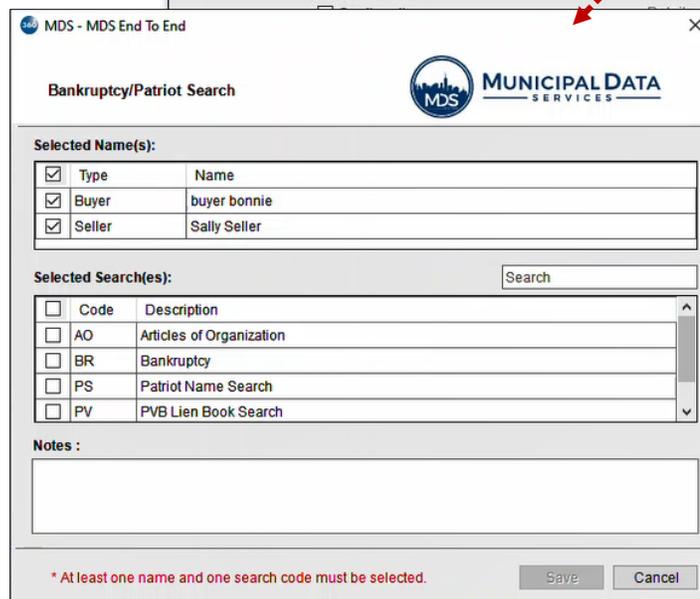
- If a task is not added to the **Requested Tasks** screen in the order, the option shows as unchecked, and the **Details** option is disabled. The user can manually check the box to select the option and open the **Details** screen.
- If a search is not supported for a county for one or more properties, an error message displays listing the county and the type of search that is not supported.



- When the box is manually checked, the user is required to click the **Details** link to select a code.

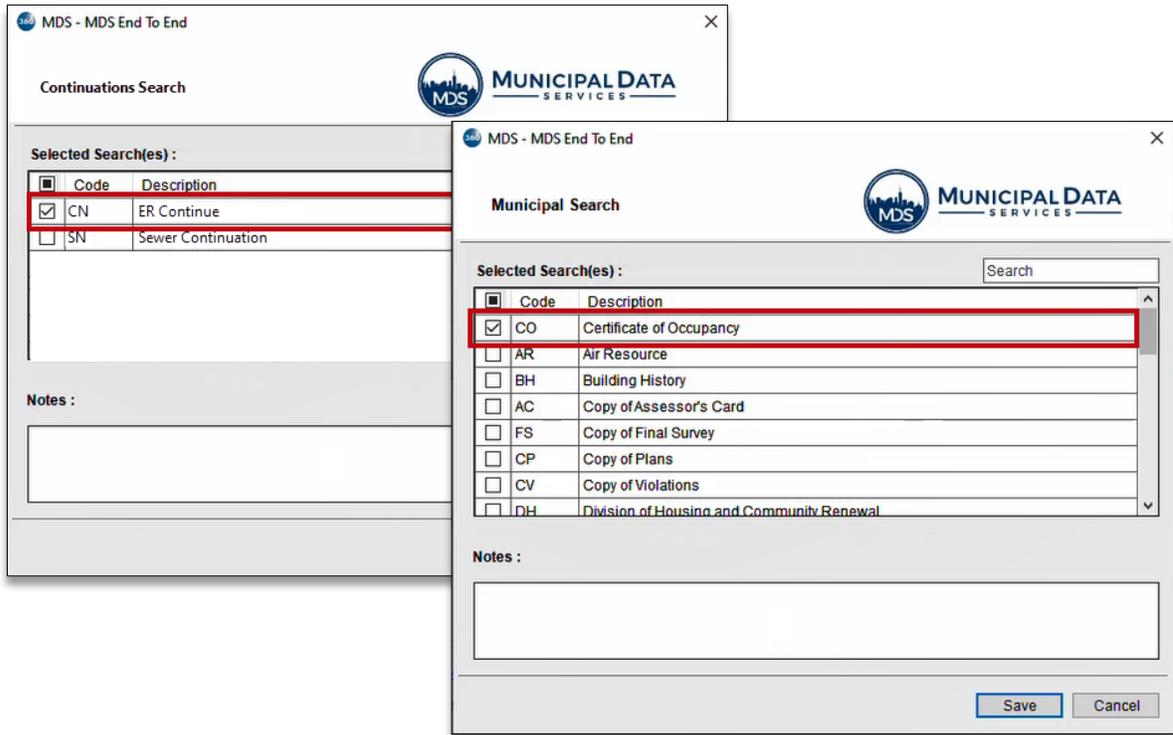


The **Details** screen allows the user to make additional selections for a particular search.

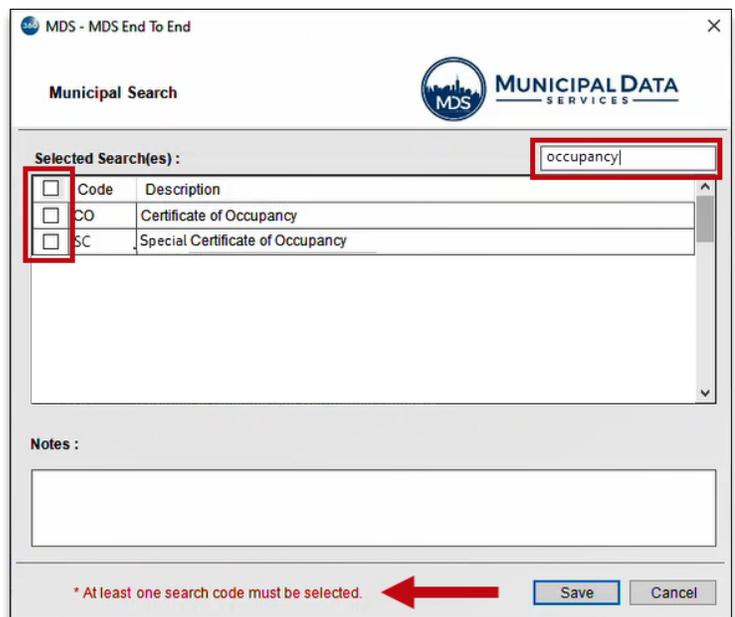


On the following screens the user can select the search(es) and add notes to all search(es) on the screen.

- The user can select the desired search(es) on the **Details** screen.



- The user can also search for the type of search desired using the **Search** field. At least one search must be selected.



When all desired searches have been selected, click **Submit** to send the request to Municipal Data Services.

MDS - MDS End To End

Searches

Property: 125 Main street, New York, New York, NY 10024

Apply Selections to All Properties

Tax Details

Municipal [Details](#)

Bankruptcy / Patriot Details

New York State Corporate Services / Other Details

Continuations Details

Back Submit Cancel

## Multiple Property Searches

To select different searches for different properties in an order, select the first property from the drop-down on the **Searches** screen, then select the desired searches using the check boxes and **Details** screens.

MDS - MDS End To End

Searches

Property: 125 Main street, New York, New York, NY 10024

Apply Selections to All Properties

Tax Details

Municipal [Details](#)

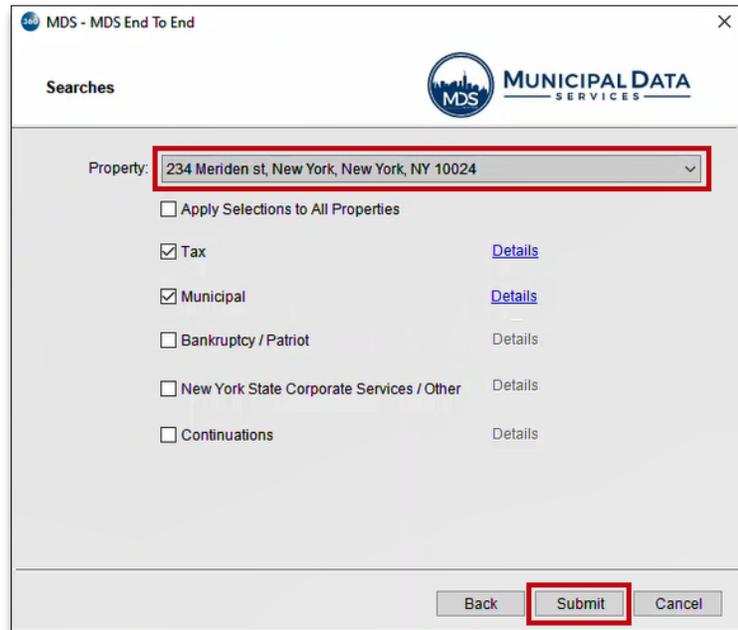
Bankruptcy / Patriot Details

New York State Corporate Services / Other Details

Continuations Details

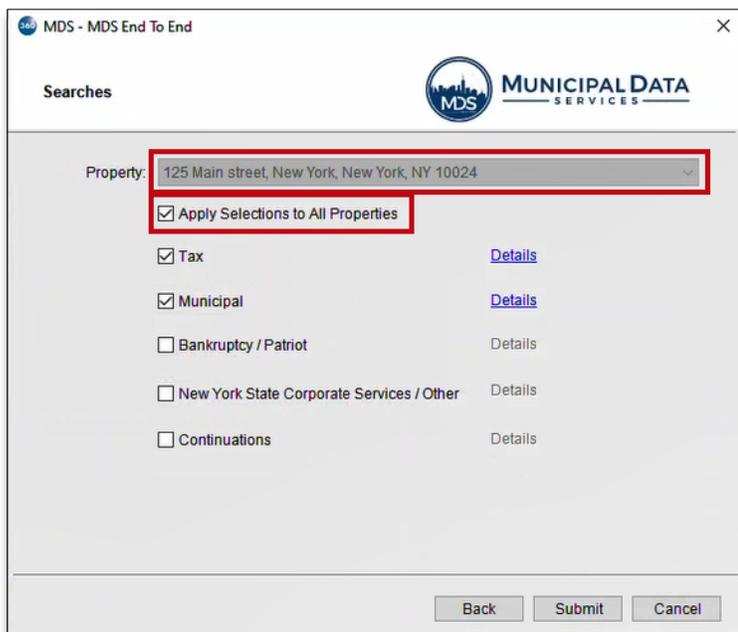
Back Submit Cancel

Once all searches are selected for the first property, select the second property from the drop-down list on the **Searches** screen. Repeat the process of selecting the desired searches. Once all properties and searches have been selected, click the **Submit** button to send the request to Municipal Data Services.

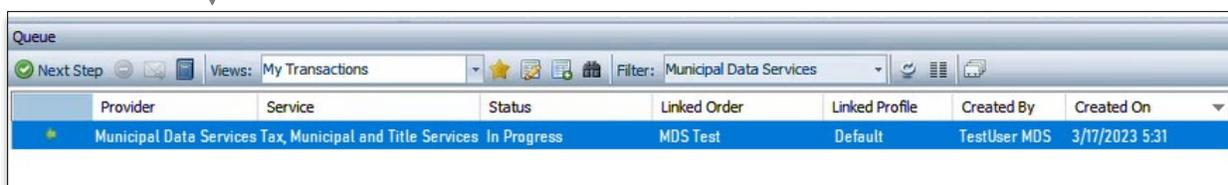


If the same searches are required for multiple properties, selecting the **Apply Selections to All Properties** check box applies all selected searches to all properties.

The **Property** drop down is then greyed out, as all searches are being applied to all properties.

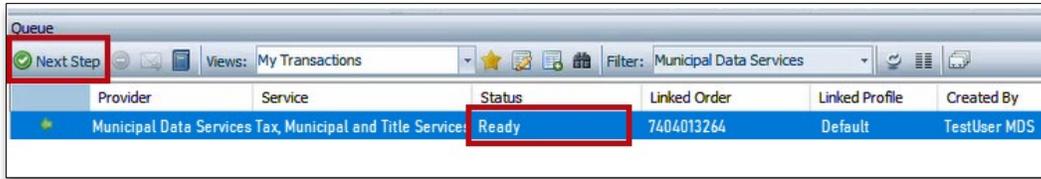


Once submitted, one transaction is created in the **360 Queue** for all properties.



## Accepting Documents

The **360 Queue** shows the transaction status as **Ready** when documents have been sent from Municipal Data Services. Click the **Next Step** button to review the documents.

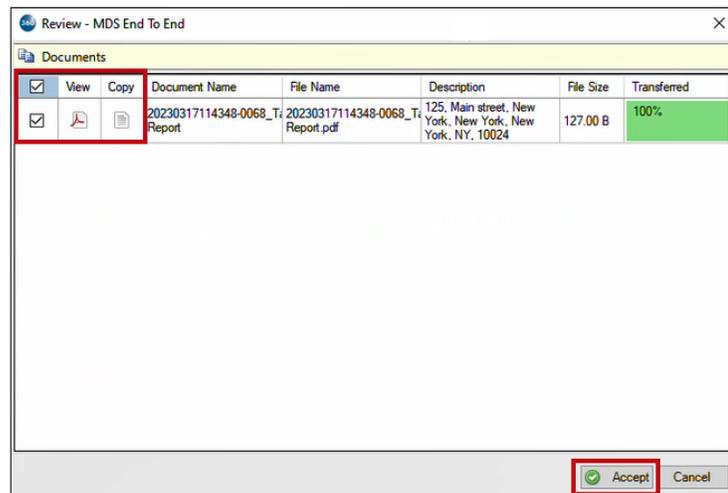


## Review Screen

The **Review** screen allows the user to view, copy, and accept documents from Municipal Data Services into the Select order.

- The check box should be checked for each document that you want to accept.

**NOTE:** If a user decides to uncheck a file(s) and accept the remaining files, the action cannot be undone. All unselected files are removed, and the user needs to request these files from Municipal Data Services again.



- View:** View received documents.
- Copy:** Save a copy of the document to the clipboard.
- Accept:** Attaches and saves the selected document(s) to smartview for FNF Direct Operations and to the Select Attachments for SoftPro customers.

**NOTE:** If multiple searches exist, they may not all be returned at the same time. The status in the 360 queue changes to **Ready** when additional data has been returned and is ready to accept.

