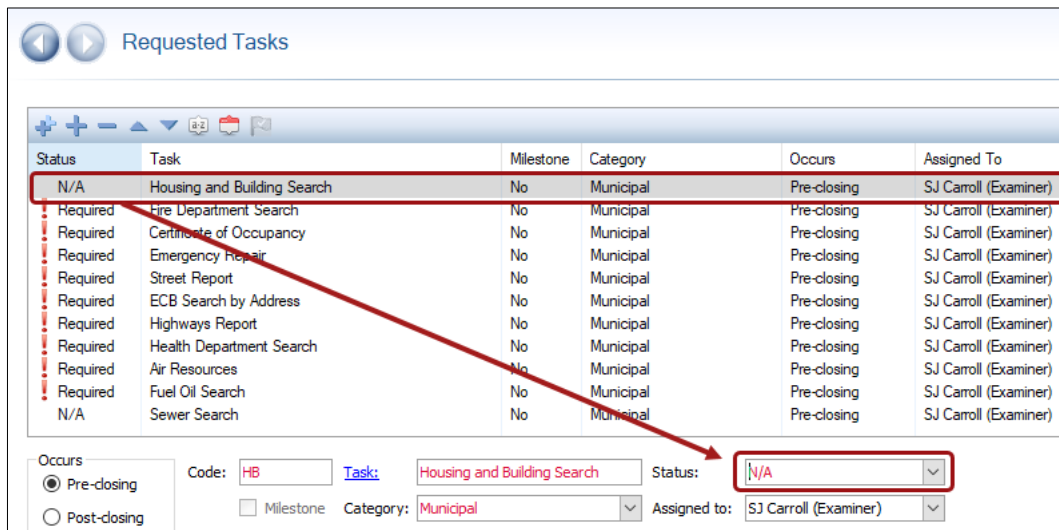


## Ordering Municipal Searches

Follow the steps when it is necessary to order municipal search(es).

Once the order is opened, from the **Order** ribbon,

1. Click the **Requested Task** button to view the possible municipal searches
2. If a Municipal search,
  - › is not needed for this transaction,
    - a) Select the entry in the grid
    - b) From the **Status** drop-down, select **N/A**



Status	Task	Milestone	Category	Occurs	Assigned To
N/A	Housing and Building Search	No	Municipal	Pre-closing	SJ Carroll (Examiner)
Required	Fire Department Search	No	Municipal	Pre-closing	SJ Carroll (Examiner)
Required	Certificate of Occupancy	No	Municipal	Pre-closing	SJ Carroll (Examiner)
Required	Emergency Repair	No	Municipal	Pre-closing	SJ Carroll (Examiner)
Required	Street Report	No	Municipal	Pre-closing	SJ Carroll (Examiner)
Required	ECB Search by Address	No	Municipal	Pre-closing	SJ Carroll (Examiner)
Required	Highways Report	No	Municipal	Pre-closing	SJ Carroll (Examiner)
Required	Health Department Search	No	Municipal	Pre-closing	SJ Carroll (Examiner)
Required	Air Resources	No	Municipal	Pre-closing	SJ Carroll (Examiner)
Required	Fuel Oil Search	No	Municipal	Pre-closing	SJ Carroll (Examiner)
N/A	Sewer Search	No	Municipal	Pre-closing	SJ Carroll (Examiner)

Occurs: ☒ Pre-closing ☐ Post-closing

Code:  Task:  Status:

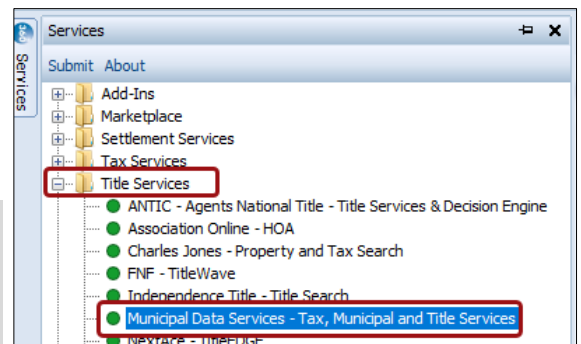
☐ Milestone Category:  Assigned to:

- › is requested by SJ Carroll follow your normal process of emailing the request
- › is requested by Municipal Data Services continue to the next section

From the **360** tab,

1. Click the **Services** button
2. Locate and expand the **Title Services** folder
3. Double-click the **Municipal Data Services – Tax, Municipal and Title Services** entry
4. Place your order for the applicable searches

**NOTE:** Refer to the job aid, [SoftPro 360 - Municipal Data Services User Guide](#), if detailed steps are needed for placing an order with Municipal Data Services.



Services

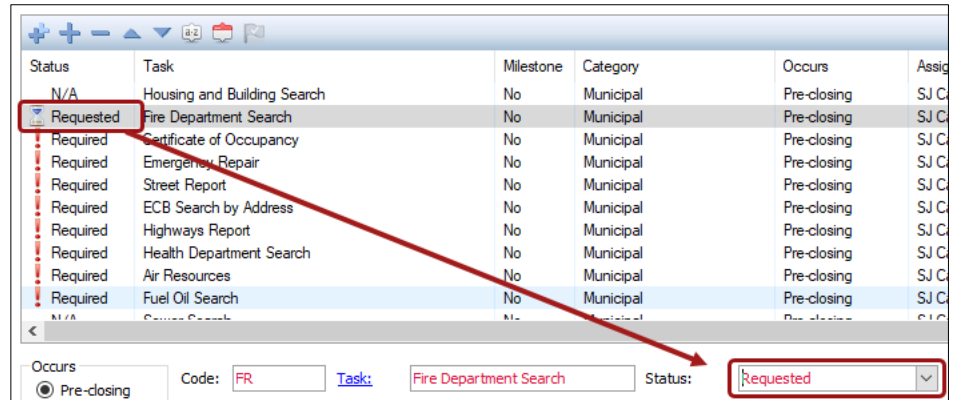
Submit About

- Add-Ins
- Marketplace
- Settlement Services
- Tax Services
- Title Services
  - ANTIC - Agents National Title - Title Services & Decision Engine
  - Association Online - HOA
  - Charles Jones - Property and Tax Search
  - FNF - TitleWave
  - Independence Title - Title Search
  - Municipal Data Services - Tax, Municipal and Title Services**
  - NEXACE - TitleEDGE

## Ordering Municipal Searches

Once the search orders are placed,

5. Select the corresponding Task in the grid
6. From the **Status** drop-down, select **Requested**
7. Repeat **steps 5-6** for each search ordered

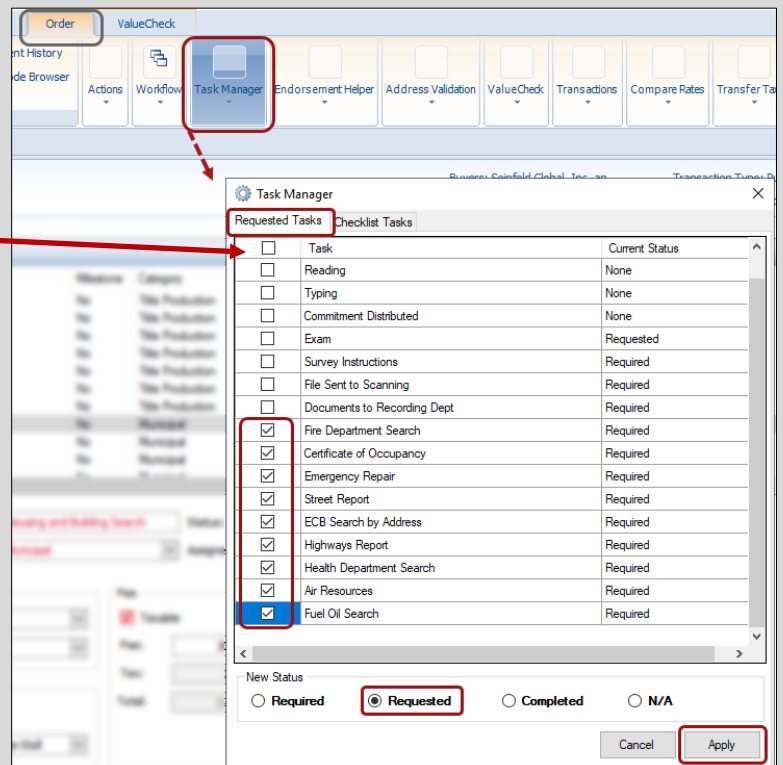


Status	Task	Milestone	Category	Occurs	Assign
N/A	Housing and Building Search	No	Municipal	Pre-closing	SJ C
Requested	Fire Department Search	No	Municipal	Pre-closing	SJ C
Required	Certificate of Occupancy	No	Municipal	Pre-closing	SJ C
Required	Emergency Repair	No	Municipal	Pre-closing	SJ C
Required	Street Report	No	Municipal	Pre-closing	SJ C
Required	ECB Search by Address	No	Municipal	Pre-closing	SJ C
Required	Highways Report	No	Municipal	Pre-closing	SJ C
Required	Health Department Search	No	Municipal	Pre-closing	SJ C
Required	Air Resources	No	Municipal	Pre-closing	SJ C
Required	Fuel Oil Search	No	Municipal	Pre-closing	SJ C
N/A	Survey Search	No	Municipal	Pre-closing	SJ C

Occurs: ☒ Pre-closing Code: FR Task: Fire Department Search Status: Requested

**SOFTPRO SHORTCUT:** When you have multiple tasks to update, you can use the **Task Manager Wizard**.

1. From the **Order** ribbon, click the **Task Manager** button
2. Select the **Requested Tasks** tab
3. Check the corresponding check box for each Task to update; if all of the tasks are to be updated, click the check box in the header row
4. Check the applicable **New Status** radio button
5. Click **Apply** button



Task Manager

Requested Tasks Checklist Tasks

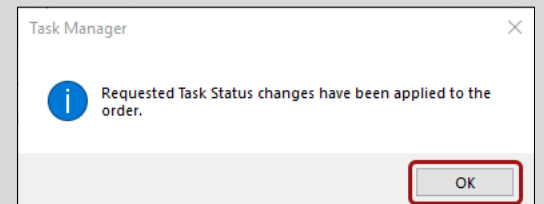
Task	Current Status
<input type="checkbox"/> Task	None
<input type="checkbox"/> Reading	None
<input type="checkbox"/> Typing	None
<input type="checkbox"/> Commitment Distributed	None
<input type="checkbox"/> Exam	Requested
<input type="checkbox"/> Survey Instructions	Required
<input type="checkbox"/> File Sent to Scanning	Required
<input type="checkbox"/> Documents to Recording Dept	Required
<input checked="" type="checkbox"/> Fire Department Search	Required
<input checked="" type="checkbox"/> Certificate of Occupancy	Required
<input checked="" type="checkbox"/> Emergency Repair	Required
<input checked="" type="checkbox"/> Street Report	Required
<input checked="" type="checkbox"/> ECB Search by Address	Required
<input checked="" type="checkbox"/> Highways Report	Required
<input checked="" type="checkbox"/> Health Department Search	Required
<input checked="" type="checkbox"/> Air Resources	Required
<input checked="" type="checkbox"/> Fuel Oil Search	Required

New Status: ☐ Required ☒ Requested ☐ Completed ☐ N/A

Cancel Apply

6. When prompted, click the **OK** button to confirm updates have been applied
7. Click the **x** (upper right) to close the **Task Manager wizard**

Now all of the tasks are updated at once.



Task Manager

Requested Task Status changes have been applied to the order.

OK

## Ordering Municipal Searches

When the Municipal searches are received,

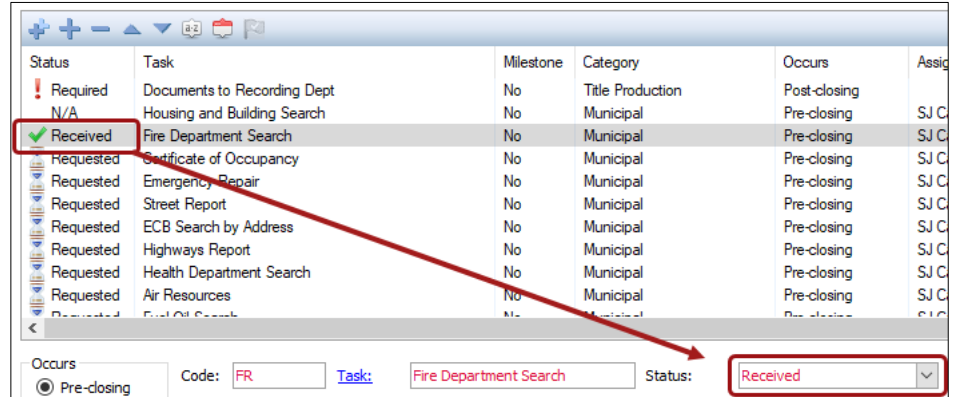
8. Navigate to the **Requested Tasks** screen

9. Update the task status; if updating,

› individual tasks

a) Highlight the corresponding task in the grid

b) Set **Status** to **Received**



Status	Task	Milestone	Category	Occurs	Assign
Required	Documents to Recording Dept	No	Title Production	Post-closing	
N/A	Housing and Building Search	No	Municipal	Pre-closing	SJ C
Received	Fire Department Search	No	Municipal	Pre-closing	SJ C
Requested	Certificate of Occupancy	No	Municipal	Pre-closing	SJ C
Requested	Emergency Repair	No	Municipal	Pre-closing	SJ C
Requested	Street Report	No	Municipal	Pre-closing	SJ C
Requested	ECB Search by Address	No	Municipal	Pre-closing	SJ C
Requested	Highways Report	No	Municipal	Pre-closing	SJ C
Requested	Health Department Search	No	Municipal	Pre-closing	SJ C
Requested	Air Resources	No	Municipal	Pre-closing	SJ C

Occurs: ☒ Pre-closing Code: FR Task: Fire Department Search Status: Received

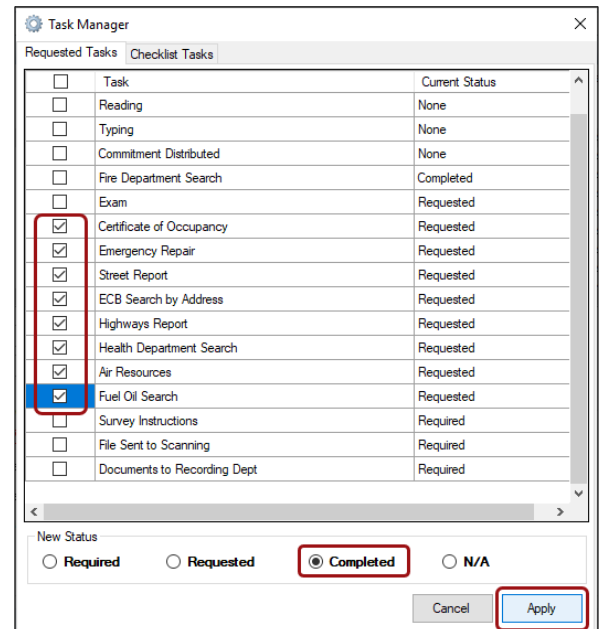
› multiple tasks using the **Task Manager Wizard**

a) click the **Task Manager** button

b) check the corresponding tasks

c) check the **Completed** radio button

d) Click **Apply** and close the wizard



Task Manager

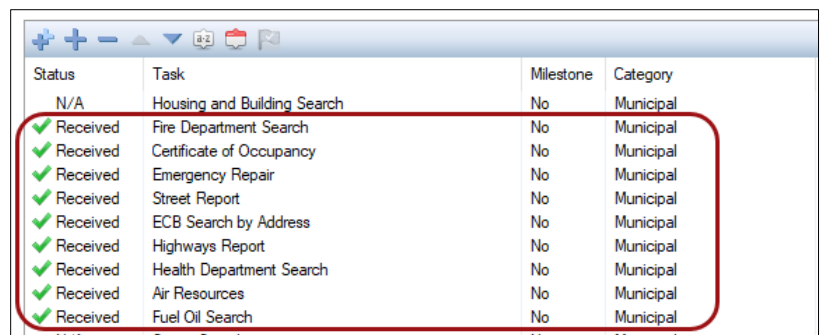
Requested Tasks Checklist Tasks

Task	Current Status
<input type="checkbox"/> Reading	None
<input type="checkbox"/> Typing	None
<input type="checkbox"/> Commitment Distributed	None
<input type="checkbox"/> Fire Department Search	Completed
<input type="checkbox"/> Exam	Requested
<input checked="" type="checkbox"/> Certificate of Occupancy	Requested
<input checked="" type="checkbox"/> Emergency Repair	Requested
<input checked="" type="checkbox"/> Street Report	Requested
<input checked="" type="checkbox"/> ECB Search by Address	Requested
<input checked="" type="checkbox"/> Highways Report	Requested
<input checked="" type="checkbox"/> Health Department Search	Requested
<input checked="" type="checkbox"/> Air Resources	Requested
<input checked="" type="checkbox"/> Fuel Oil Search	Requested
<input type="checkbox"/> Survey Instructions	Required
<input type="checkbox"/> File Sent to Scanning	Required
<input type="checkbox"/> Documents to Recording Dept	Required

New Status  
☐ Required ☐ Requested ☒ Completed ☐ N/A

Cancel Apply

The updated Tasks now show as **Received**.



Status	Task	Milestone	Category
N/A	Housing and Building Search	No	Municipal
Received	Fire Department Search	No	Municipal
Received	Certificate of Occupancy	No	Municipal
Received	Emergency Repair	No	Municipal
Received	Street Report	No	Municipal
Received	ECB Search by Address	No	Municipal
Received	Highways Report	No	Municipal
Received	Health Department Search	No	Municipal
Received	Air Resources	No	Municipal
Received	Fuel Oil Search	No	Municipal