



Municipal Data Services User Guide

March 2023

4800 Falls of Neuse Road, Suite 600 | Raleigh, NC 27609
p (800) 848-0143 | f (919) 755-8350 | www.softprocorp.com

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History

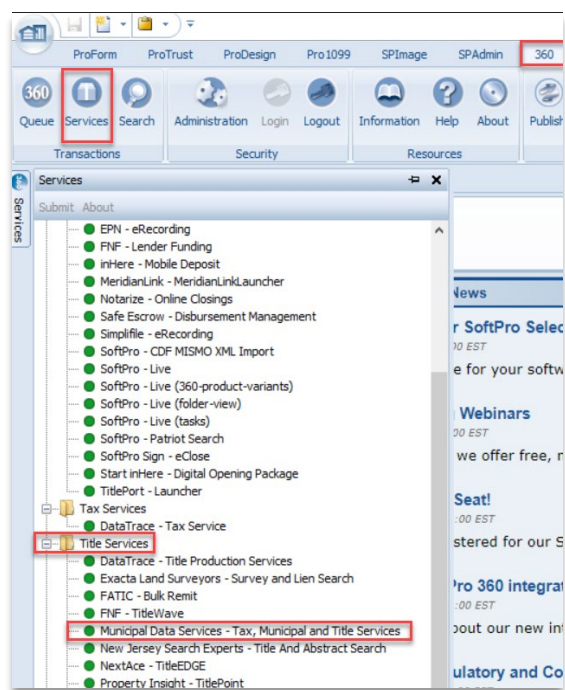
Date	Version	Details
March 2023	1.0	Initial User Guide

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.

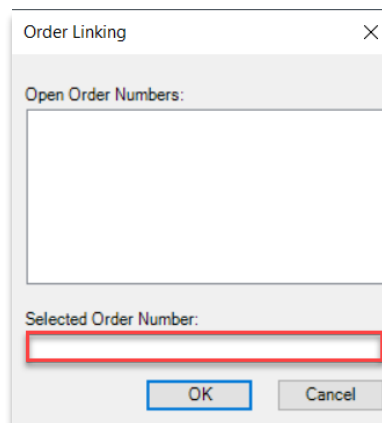
Accessing From The 360 Services Menu

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.



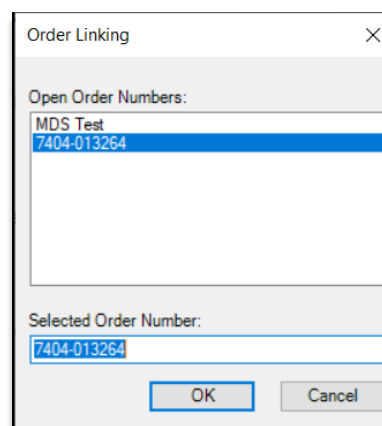
Select a ProForm Order for the Search

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**.



The 'Order Linking' dialog box is shown with a close button (X) in the top right corner. It contains two main sections: 'Open Order Numbers:' with an empty list box, and 'Selected Order Number:' with an empty text input field. At the bottom are 'OK' and 'Cancel' buttons. A red rectangle highlights the 'Selected Order Number' input field.

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**.



The 'Order Linking' dialog box is shown with a close button (X) in the top right corner. It contains two main sections: 'Open Order Numbers:' with a list box containing 'MDS Test' and '7404-013264' (the latter is selected with a blue highlight), and 'Selected Order Number:' with a text input field containing '7404-013264'. At the bottom are 'OK' and 'Cancel' buttons.

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.

MDS - MDS End To End

Welcome

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.

☐ Skip Welcome Page

Next Cancel

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.

MDS - MDS End To End

General Information

First and Last Name:

Email Address:

Due Date:

Notes:

Back Next Cancel

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.

Property Information

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

Address: 125 Main street

Town: New York State: NY

City: New York County: New York

Village:

District: Section:

Block: Lot:

Owner 1: Sally Seller

Owner 2:

Back

Property Information

Property: 234 Meriden st, New York, New York, NY 10024

Address: 234 Meriden st

Town: New York State: NY Zip: 10024-

City: New York County: New York

Village:

District: Section:

Block: Lot:

Owner 1: Sally Seller

Owner 2:

Back Next Cancel

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.

Status	Task	Milestone	Category	Occurs	Assigned To	Request Due
Required	Certificate of Occupancy	No	Municipal	Pre-closing	Municipal Data Service	

Occurs: ☒ Pre-closing ☐ Post-closing

Code: CO Task: Certificate of Occupancy

Milestone: ☐ Category: Municipal

Searches

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

☐ Apply Selections to All Properties

☐ Tax Details

☒ Municipal Details

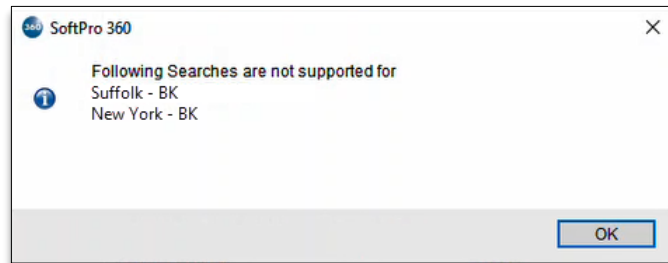
☐ Bankruptcy / Patriot Details

☐ New York State Corporate Services / Other Details

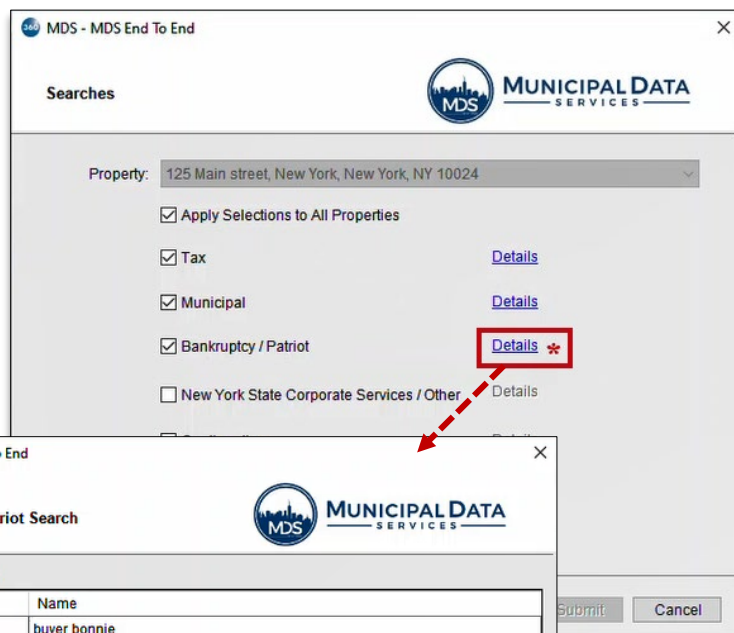
☐ Continuations Details

Back Submit Cancel

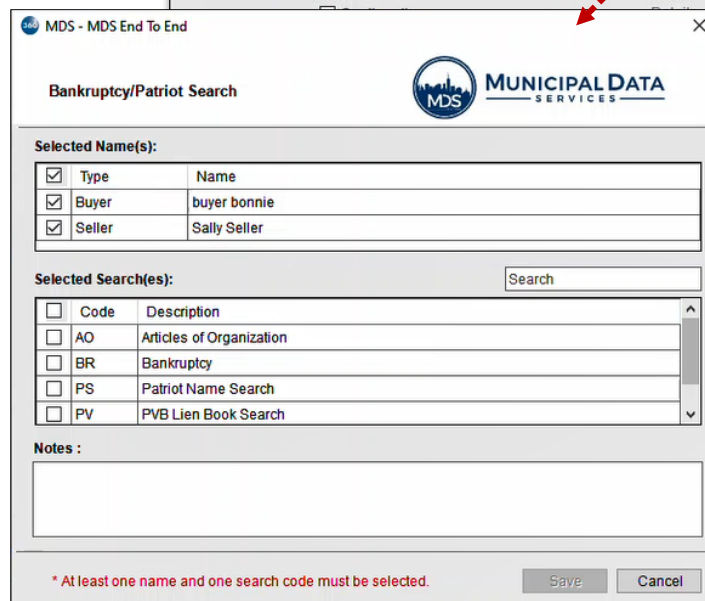
- If a task is not added to the **Requested Tasks** screen in the order, the option shows as unchecked, and the **Details** option is disabled. The user can manually check the box to select the option and open the **Details** screen.
- If a search is not supported for a county for one or more properties,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

Continuations Search

<input type="checkbox"/>	Code	Description
<input checked="" type="checkbox"/>	CN	ER Continue
<input type="checkbox"/>	SN	Sewer Continuation

Notes :

Municipal Search

Selected Search(es):

<input type="checkbox"/>	Code	Description
<input checked="" type="checkbox"/>	CO	Certificate of Occupancy
<input type="checkbox"/>	AR	Air Resource
<input type="checkbox"/>	BH	Building History
<input type="checkbox"/>	AC	Copy of Assessor's Card
<input type="checkbox"/>	FS	Copy of Final Survey
<input type="checkbox"/>	CP	Copy of Plans
<input type="checkbox"/>	CV	Copy of Violations
<input type="checkbox"/>	DH	Division of Housing and Community Renewal

Notes :

Save Cancel

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

Municipal Search

Selected Search(es):

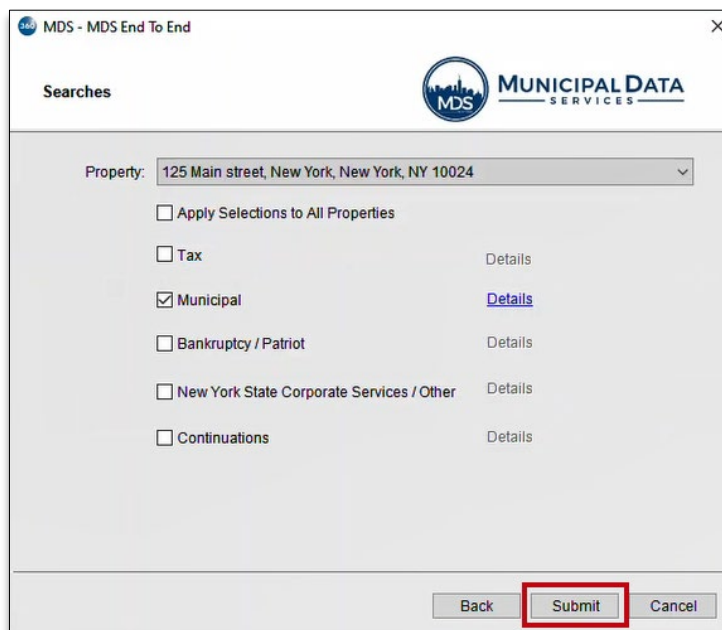
<input type="checkbox"/>	Code	Description
<input type="checkbox"/>	CO	Certificate of Occupancy
<input type="checkbox"/>	SC	Special Certificate of Occupancy

Notes :

* At least one search code must be selected.

Save Cancel

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

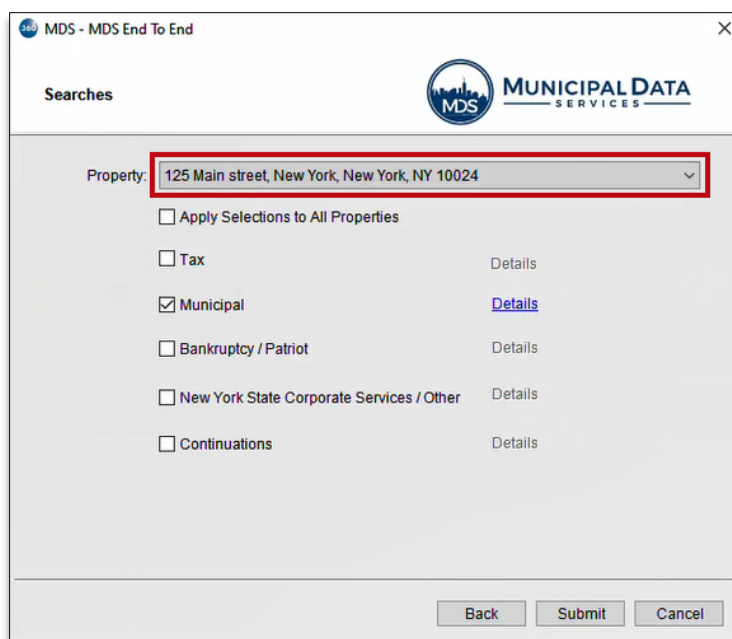
☐ New York State Corporate Services / Other Details

☐ 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.

MDS - MDS End To End

Searches

Property: 234 Meriden st, 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](#)

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.

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](#)

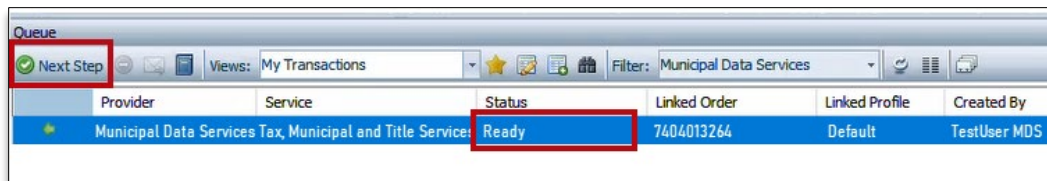
[Back](#) [Submit](#) [Cancel](#)

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

Queue						
Next Step Views: My Transactions Filter: Municipal Data Services						
Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On
Municipal Data Services Tax, Municipal and Title Services	In Progress	MDS Test	Default	TestUser MDS	3/17/2023 5:31	

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.

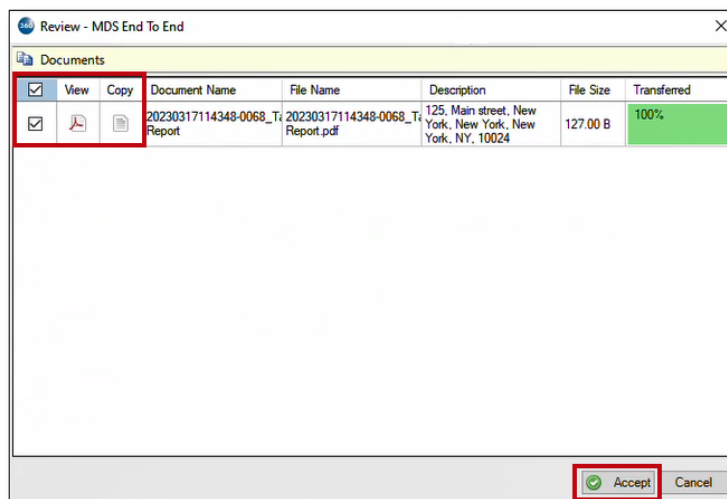


Review Screen

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.

