



TitleWave

PURPOSE: To illustrate how to set up and use TitleWave inside ResWare.

Setup

Admin/Partners

- Click **New**.
- Enter a **Company Name** for the TitleWave partner, likely *TitleWave*.
- Select a **Partner Type** by clicking **Add**, likely *Searcher*.
- Click **Save**.

The screenshot shows the 'Edit Partner' interface. The 'Company Name' field is highlighted with a red box and contains the text 'TitleWave'. Below it, the 'Partner Types' section is also highlighted with a red box, showing a list with 'Searcher' selected and 'Add...' and 'Remove' buttons. Other visible fields include 'Company Abbreviation', 'Proper Company Name', 'Contact Information' (Phone Number, Fax Number, Email Address, Website, Pref. Comm.), 'Address' (Address 1, Address 2, ZIP, City, State, County), and 'Company Information' (Owned By, Parent Company, Documents).

- Highlight the partner and click **New** to add an employee.
- Enter a **First Name** and an **Email Address**.
- Assign a **Password** and set the **Expires** date to a date far into the future.
- Check the **Enabled** box in the *Website Access* area and enable the website roles for *Web Services: Add Documents*, *Web Services: Add Notes*, *Web Services: Update Partner*, and *Web Services: Get Partners*.
 - o NOTE: TitleWave will need to be given the username and password for this user.
- Click **Save**.



Edit Employee

Name
First Name: TitleWave
 Last Name: Partner
 Title:

Contact Information
 Phone Number:
 Cell Phone:
 Home Phone:
 Voicemail:
 Fax Number:
Email Address: titlewave@partner.com
 Pref. Comm.: Email

Time Zone
 (UTC-07:00) Mountain Time (US & Canada)

Send Documents As
 Attachments Weblinks

Office Access

OfficeID	Name	Default	Access
4	Aurora Office	<input type="checkbox"/>	<input checked="" type="checkbox"/>
3	Boulder Office	<input type="checkbox"/>	<input checked="" type="checkbox"/>
1	Default Office	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2	Fiddlers Green	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Partner Employee Created
 By: Adeptive Admin
 On: 5/19/2016 7:29 AM
 ID: 4670

Website Access
 Enabled
Username: titlewave@partner.com
 Override Username
Password: twpassword
 Expires: 5/19/2025
 Create/Reset Password
 Email to User
 Display on Screen
 Start Page: Home

Website Roles

Permit	RoleID	Name
<input type="checkbox"/>	79	View Shipping Information
<input type="checkbox"/>	61	View Signing Information
<input type="checkbox"/>	6013	Web Services: Add Actions
<input checked="" type="checkbox"/>	6005	Web Services: Add Documents
<input checked="" type="checkbox"/>	6002	Web Services: Add Notes
<input type="checkbox"/>	6009	Web Services: Add Partners
<input type="checkbox"/>	6015	Web Services: Add WebURL D
<input type="checkbox"/>	5027	Web Services: Bypass Address
<input type="checkbox"/>	6003	Web Services: Cancel Files
<input type="checkbox"/>	5023	Web Services: Estimate Costs
<input type="checkbox"/>	6016	Web Services: Expense Report
<input type="checkbox"/>	6012	Web Services: Get Actions
<input type="checkbox"/>	6007	Web Services: Get Custom Fie
<input type="checkbox"/>	6006	Web Services: Get Documents
<input type="checkbox"/>	6001	Web Services: Get Notes
<input type="checkbox"/>	6010	Web Services: Get Partners
<input type="checkbox"/>	69	Web Services: Order Placemer
<input type="checkbox"/>	6004	Web Services: Override Proper
<input type="checkbox"/>	6011	Web Services: Remove Partner
<input type="checkbox"/>	6014	Web Services: Search Files

Buttons: Help, Save, Reset, Close

Admin/General Setup/XML Clients

- Highlight *TitleWave* (XMLClientID = 29) and click **Edit**.
- Enter an **Outgoing Username** and an **Outgoing Password**.
 - o Both of these are unique per customer and will be provided by TitleWave.
- The **TitleWave Domain** should be *fnfglobal*.
- Enter a **TitleWave User ID**.
 - o This will be provided by TitleWave.
- Select a **Remote File Partner** by clicking **Search** and selecting a partner.
 - o This should be the partner created above.
 - o This partner will need to be on the file to use TitleWave.
- Select an **Incoming Document Type** by clicking **Search** and selecting a document type, such as *Other*.
 - o All incoming documents from TitleWave will be set to this document type.



- Select an **Incoming Easement Type** by clicking **Search** and selecting an easement type, such as *Other*.
 - o All incoming easements from TitleWave will be set to this easement type.
- Select an **Incoming Lien Type** by clicking **Search** and selecting a lien type, such as *Other*.
 - o All incoming liens from TitleWave will be set to this lien type.
- Click **Add** in the *TitleWave Profiles* area to create a profile.
 - o These profiles are set up to service specific locations and order types and are used to send orders to TitleWave.

- Enter a **Name** for the profile.
- Select states that are covered in the **State Coverage** area by clicking **Add** and selecting a state or states.
- Select a **Company**.



- If this field doesn't populate, it means that the TitleWave UserID is not configured to service one or more of the locations selected. Please call TitleWave to gain access to the location.
- Select an **Order Type**.
 - If this field doesn't populate, it means that TitleWave isn't providing any order types in for the company selected. Please call TitleWave to obtain order types.
- Select a **Product Type**.
 - If this field doesn't populate, it means that TitleWave isn't providing any product types for the order type selected. Please call Title Wave to obtain product types.
- The **Brand** will automatically populate based on the information entered above.
- To refresh the selection options for a state, select the state and click **Fetch Data**. This will cause the **Company**, **Order Type**, and **Product Type** selections to retrieve any new data made available by TitleWave.
- Click **Save**.
- Repeat for each profile that is needed.

TitleWave Profile

Name:

Company:

State Coverage:

State
Maryland

Buttons: Add, Remove, Fetch Data

Order Type:

Product Type:

Brand:

Buttons: Help, Save, Reset, Close

Admin/Documents and Templates/Document Types

- Select a document type that was set above and click **Edit**.
- Check **Allow Upload for Partner Types**
 - If all partner types should be able to upload this document type, select **All**.
 - If only some partner types should be able to upload this document type, select **Selected**, click **Edit**, and select the appropriate partner types. The TitleWave partner must be able to upload this document type.



Edit Document Type

Document Type: Other

Max on File:

Document Upload ID:

Ordering Weight: 2

Package Barcode Type: None

Type When Hidden: None

Enabled

Default to Internal Only

Default as Approved

Snapshot Edited Attachments

Default Snapshots to Internal Only

Force a Default Document Name:

Always Send as Weblink

Default to Public

Default to Secured

Flag Emails for Encryption

Force Read Only on Website Download or when Emailed

Force Read Only

Read Only for Partner Types

All

Selected

Partner Type Add... Remove

Read Only for Partners

All

Selected

Partner Partner Type Add... Remove

Website

Allow upload for Partner Types All Selected Edit...

Notify on upload for Partner Types All Selected Edit...

Notification Coordinator Type: Not Set

Visible to Partner Types

All

Selected

Partner Type Add... Remove

Visible to Buyer/Seller/Customers

All

Selected

Buyer/Seller/Customer Add... Remove

Help Save Reset Close

Admin/Action Lists/Product Types

- Highlight a product type that will use TitleWave and click **Edit**.
- Click **Add** in the *XML* section.
- Select the *TitleWave* package and click **OK**.
- Click **Save**.



The screenshot shows three overlapping windows in the ResWare application:

- Administer Product Types:** A table listing various product types. The 'Purchase - With Loan' row is selected, and the 'Edit...' button is highlighted with a red box.
- Edit Product Type:** A form for editing the 'Purchase - With Loan' product type. The 'Name' is 'Purchase - With Loan' and the 'Display Name' is 'Standard Purchase'. The 'Action List' is 'Purchase with Lender'. The 'Services For' are 'Buyer' and 'Property Type: 1-4 Family'. The 'XML Package' dropdown is open, showing 'TitleWave' selected.
- Select XML Package:** A dialog box showing a list of XML packages. 'TitleWave' is selected and highlighted in blue. The 'OK' button is highlighted with a red box.

Sending an order to TitleWave manually

File/XML tab

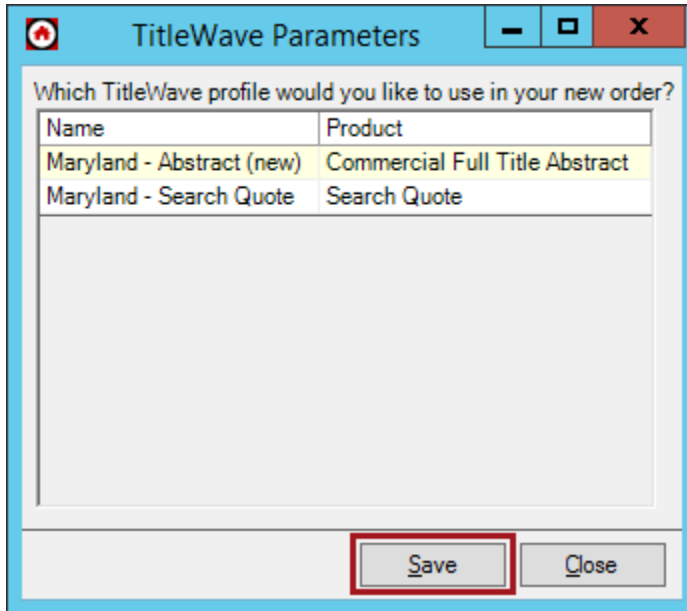
- Select *TitleWave: Order Submission* from the XML/Generic tab. This should be available as long as the TitleWave partner is on the file.
- Click **Send**.

The screenshot shows the ResWare application interface with the following details:

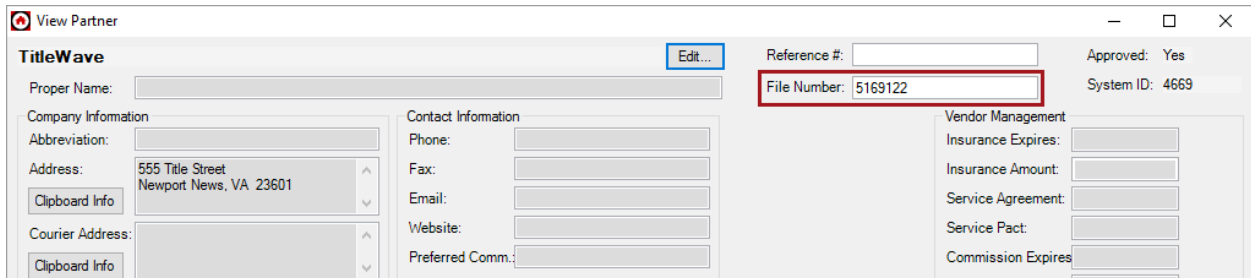
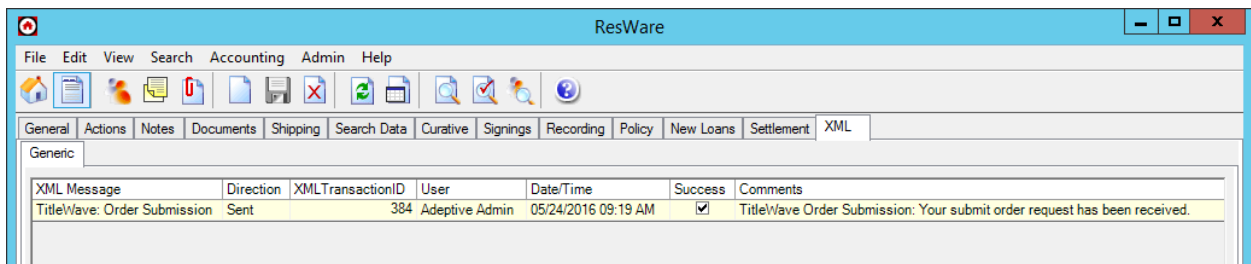
- Menu Bar:** File, Edit, View, Search, Accounting, Admin, Help.
- Toolbar:** Contains various icons for file operations and search.
- Tab Bar:** General, Actions, Notes, Documents, Phrases, Shipping, Search Data, Curative, Signings, Recording, Policy, New Loans, Settlement, Final Bill, Equities, Acquisition, **XML**, Receivables.
- XML Tab:** The 'Generic' sub-tab is selected. It contains a table with columns: XML Message, Direction, User, Date/Time, Success, Comments, and Remote ID.
- Dropdown Menu:** Opened from the 'XML Message' column, showing a list of options. 'TitleWave: Order Submission' is highlighted in blue.



- Select a profile to use and click **Save**.



- A confirmation that the order was received by TitleWave will be returned and displayed in ResWare and the file number in TitleWave's system will be displayed in the **File Number** field on the TitleWave partner on the file.

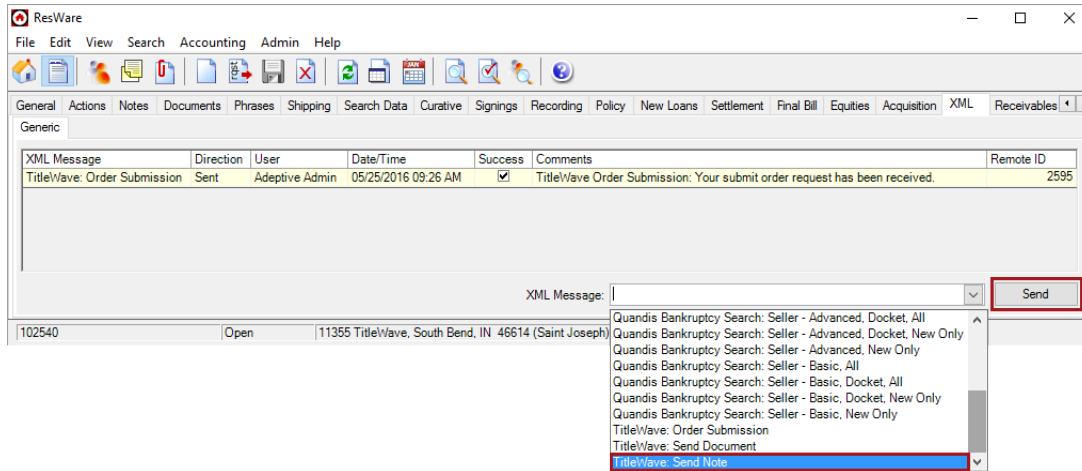




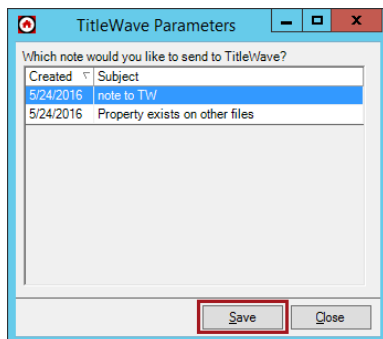
Sending notes and/or documents to TitleWave manually

File/XML tab

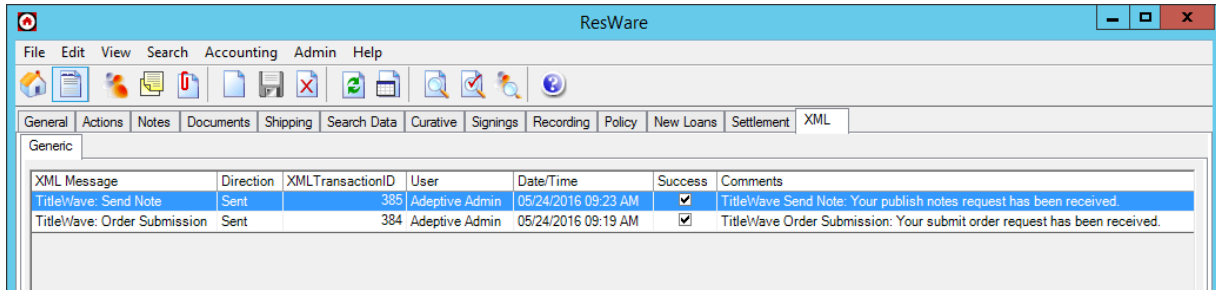
- Select *TitleWave: Send Note* from the **XML Message** drop down and click **Send**.
 - o NOTE: Notes can only be sent after TitleWave has received an order.



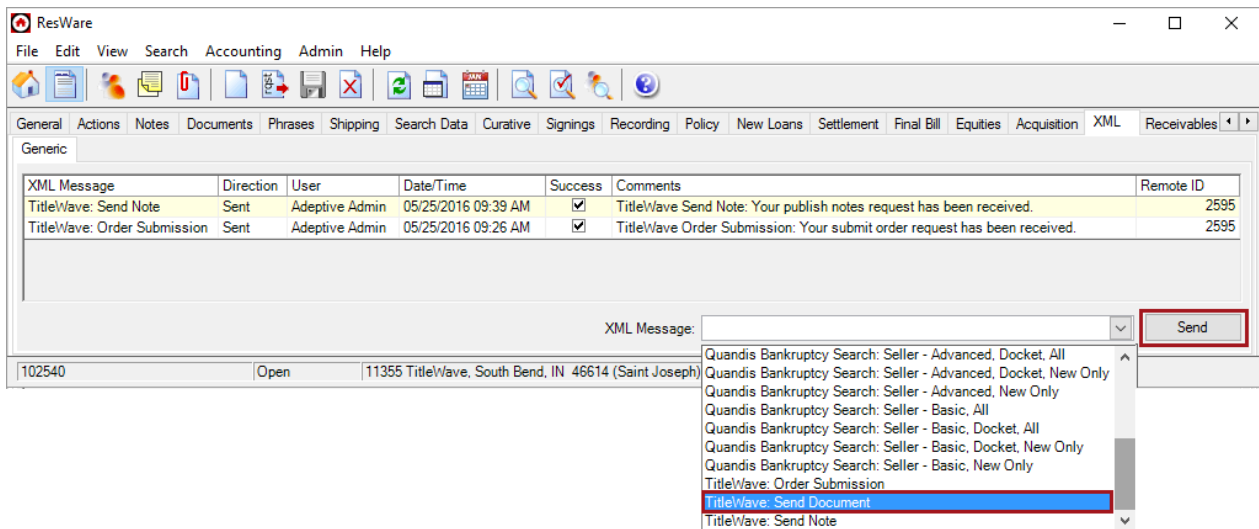
- Select a note to send to TitleWave and click **Save**.
 - o This list of available notes will populate from notes that are on the *Notes* tab of the file.



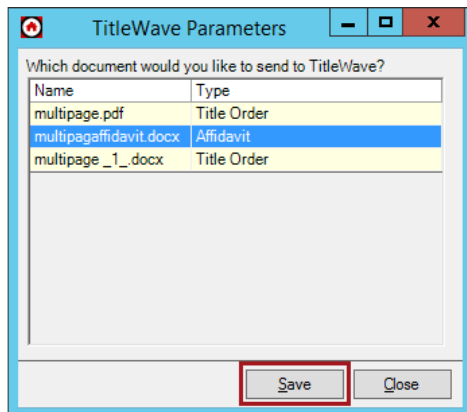
- A confirmation that the note was received will be returned and displayed.
 - o NOTE: If a document is attached to the note that is sent, only the note is sent; the document will need to be sent separately.



- Select *TitleWave: Send Document* from the **XML Message** drop down and click **Send**.
 - o NOTE: Documents can only be sent after TitleWave has received an order.



- Select a document to send to TitleWave and click **Send**.
 - o The list of available documents will populate from the *Documents* tab of the file.





- A confirmation that the document was received will be returned and displayed.
 - o NOTE: If a note is associated with the document that is sent, only the document will be sent; the note will need to be sent separately.

XML Message	Direction	XMLTransactionID	User	Date/Time	Success	Comments
TitleWave: Send Document	Sent	386	Adeptive Admin	05/24/2016 09:25 AM	✓	TitleWave Send Document: Your attach document request has been received.
TitleWave: Send Note	Sent	385	Adeptive Admin	05/24/2016 09:23 AM	✓	TitleWave Send Note: Your publish notes request has been received.
TitleWave: Order Submission	Sent	384	Adeptive Admin	05/24/2016 09:19 AM	✓	TitleWave Order Submission: Your submit order request has been received.

Sending an order to TitleWave automatically

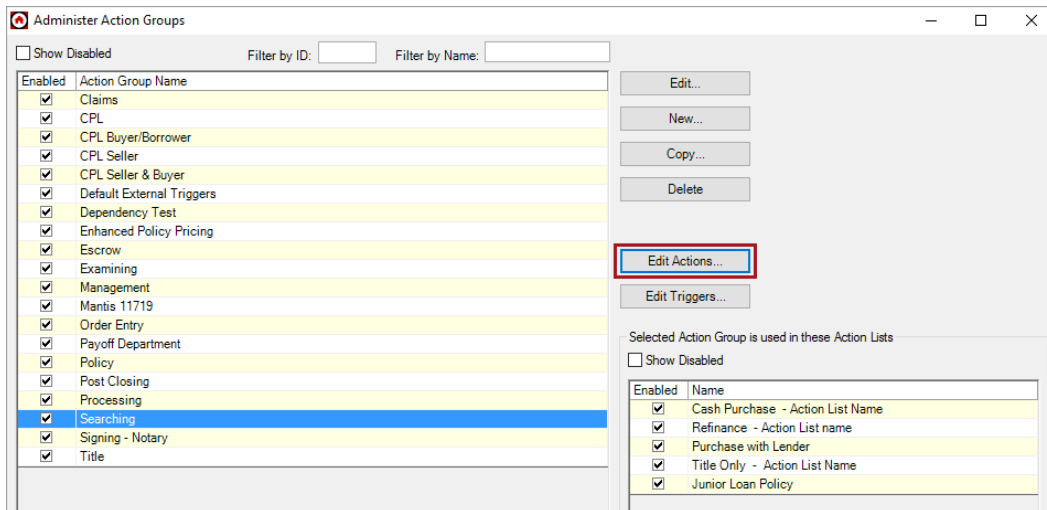
Admin/Action Lists/Global Actions

- Click **Add**.
- Enter an **Action Name**. This action will be used to send an order to TitleWave.
- Click **Save**.

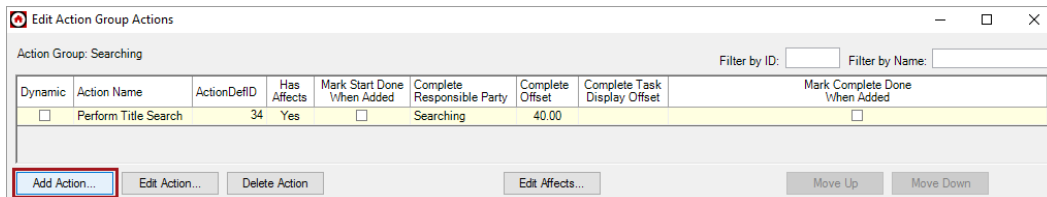
The image shows two screenshots from the ResWare application. The top screenshot is the 'Administer Global Actions' window, which contains a list of actions. A red box highlights the 'Add...' button on the right side of the list. The bottom screenshot is the 'Add Global Action' window, where the 'Action Name' field is filled with 'Send order to TitleWave' and is also highlighted with a red box. A red arrow points from the 'Add...' button in the top screenshot to the 'Add Global Action' window.

Admin/Action Lists/Action Groups

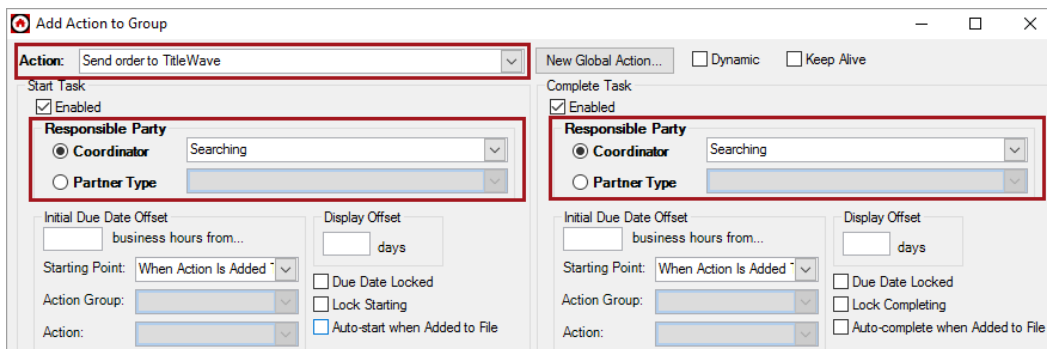
- Highlight the action group that should have the new action and click **Edit Actions**.



- Click **Add Action**.

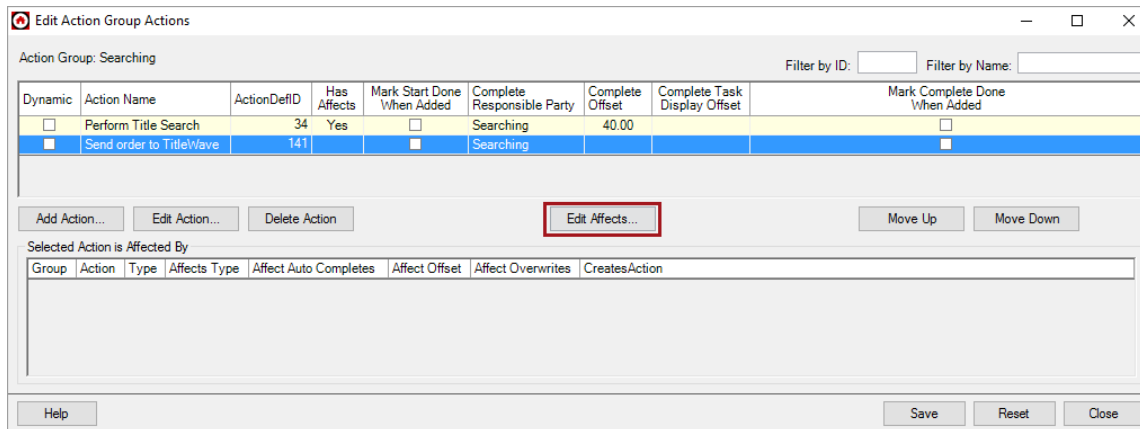


- Select the **Action** created above.
- Select a **Coordinator** for the start and complete of the action.
- Other options, such as *Auto-start when Added to File*, may be utilized, depending on what is needed to make the flow of the action group work for each customer.
- Click **Save**.

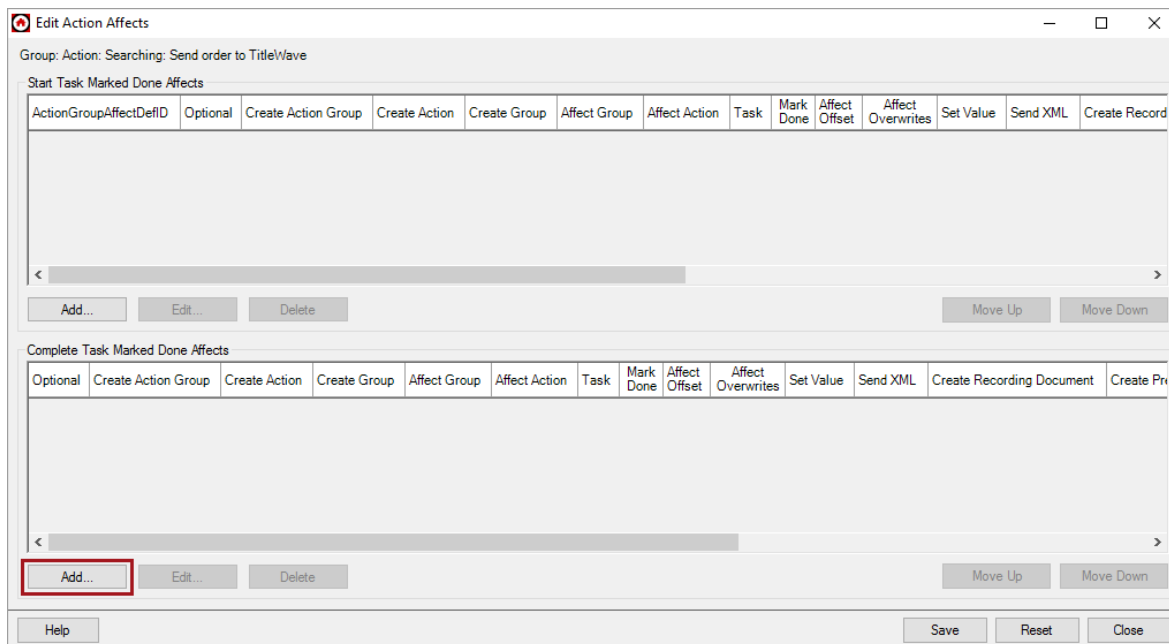




- Highlight the action that was just added and click **Edit Affects**.



- Click **Add** in either the *Start Task Marked Done Affects* or the *Complete Task Marked Done Affects* section.



- In 5 – *Marking Done Sends XML*, select the following:
 - o **XML:** *TitleWave: Order Submission*
 - o **Send To:** *Searcher*
 - o **Parameter:** The profile that should be used.
- Click **Save**.
- Repeat for additional profiles if necessary.



- Additional actions can be created if necessary. These actions can also be location-specific to assist in ensuring that the correct action/profile combination will be utilized on files.
- Create new actions for sending notes and documents using the steps above if notes and documents should also be sent automatically at various points throughout the life of the file.

Receiving data from TitleWave

File/XML tab

- The *XML* tab of the file will indicate that information has been received from TitleWave.

XML Message	Direction	XMLTransactionID	User	Date/Time	Success	Comments
ResWare: Receive Search Data	Received	379	First Titlewave	05/11/2016 12:31 PM	✓	Search Data received successfully on remote file 100098 (ID: 1098).
ResWare: Receive Search Data	Received	378	First Titlewave	05/11/2016 12:26 PM	✓	Search Data received successfully on remote file 100098 (ID: 1098).
TitleWave: Send Note	Sent	377	Adeptive Admin	05/11/2016 12:12 PM	✓	TitleWave Send Note: Your publish notes request has been received.
TitleWave: Send Note	Sent	376	Adeptive Admin	05/11/2016 12:10 PM	✓	TitleWave Send Note: Your publish notes request has been received.
TitleWave: Send Note	Sent	375	Adeptive Admin	05/11/2016 12:07 PM	✓	TitleWave Send Note: Your publish notes request has been received.
TitleWave: Send Document	Sent	374	Adeptive Admin	05/11/2016 12:07 PM	✓	TitleWave Send Document: Your attach document request has been received.
TitleWave: Order Submission	Sent	373	Adeptive Admin	05/11/2016 12:05 PM	✓	TitleWave Order Submission: Your submit order request has been received.

- If search data is received from TitleWave, the liens and easements will be added to the *Search Data* tab using the document types specified in the TitleWave setup.
 - The external trigger for *XML: Search Data Updated* can be configured to add an action to the file or affect an existing action on the file to notify the user that data has been received from TitleWave.



ResWare

File Edit View Search Accounting Admin Help

General Actions Notes Documents Phrases Shipping Search Data Curative Signings Recording Policy New Loans Settlement Final Bill Equities Acquisition XML Receivables

General Chain of Title/Taxes

Proposed Insured: Wells Fargo

Vesting: Title Wave

Property Address: 11355 TitleWave Parcel ID: 11111

Legal: South Bend Indiana 46614

Client's Comments/Special Instructions: comments/special instructions to display on file creation

Commitment Effective Date: [] Import... (Re)generate Commitment

Interest: FEE SIMPLE Leasehold: []

Loan Amount: \$125,000.00 Mortgagees: []

Loan Number: 12345 First Mortgagee: []

Typed Date: [] Second Mortgagee: []

Type	Date	Recorded	Language
Other			This is my first exception.
Other			This is my second exception.
Other			This is my third exception.
Other			This is my fourth exception.

Type	Flag	Is Tax Item	TaxID and Type	Date	Recorded	Amount	Holder	Against	Language	LienID
Other	<input type="checkbox"/>	<input type="checkbox"/>							This is my first requirement.	2973
Other	<input type="checkbox"/>	<input type="checkbox"/>							This is my second requirement.	2974
Other	<input type="checkbox"/>	<input type="checkbox"/>							This is my third requirement.	2975
Other	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>							This is my fourth requirement.	2976

102540 | Open | 11355 TitleWave, South Bend, IN 46614 (Saint Joseph) | Title Wave

- o Existing *Search Data* fields, such as the vesting, legal, leasehold, or commitment effective date, that did not contain data before receiving information from TitleWave will be updated with the data provided by TitleWave.
- o Existing *Search Data* fields that contained data when information was received from TitleWave will not be overwritten with the data from Titlewave; a note will be added to the *Notes* tab with information about which fields were updated and which fields were not updated.
- o NOTE: These notes should be carefully reviewed, as the user may have to manually update data that was not automatically updated.



Note [100098]

Author: First Titlewave
Date: 5/11/2016 12:31:01 PM
Type: XML

Subject: Receive Search Data Service

Note:

Volume="; Instrument="; Language="THIS IS MY THIRD EXCEPTION INITIALLY FROM TITLEWAVE"; Easement TypeName="; PolicyOnly="False"; IsAllCaps="False"; SortOrder="; RequiredFilled="True"; LienEasementSubcategoryID="; IsCommitmentPreparationPartner="

0 items were updated:

2 items were not updated:

1. Search Data not updated: Can't overwrite existing data. Search Data: ProposedInsured=" (is 'Wells Fargo'); CommitmentEffDate='5/9/2016 7:30:00 AM' (is '5/2/2016 7:30:00 AM'); PropertyParcelID1='TWTAXIDNO' (is '111111')
2. Primary Property not updated: No new data. Primary Property ID 1098

Internal Only File #: 100098

Send Log:

User	Date	Description
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Action Associations

Document Associations

Buttons: Add, Remove, Help, Save, Send, Save, Close, Close

- TitleWave can also send notes and documents to ResWare at any point during the life of the file.
 - o Notes will be added to the *Notes* tab.
 - o Documents will be added to the *Documents* tab as the document type specified in the TitleWave setup.
 - The external trigger for *Document Added* can be configured to add an action to the file or affect an existing action on the file to notify the user that a document has been received from TitleWave.