"Solutions" Image Services Changing a Profile Property in Real Estate Documents

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Introduction

The purpose of this document is to illustrate the process for changing a profile property on a Real Estate Document.

Summary Process

Open Document Locator Locate the appropriate document Right click, select Update Profile Enter in the correct information in the value column Workflow will automatically run to do a Move and Rename based on the property updated (will run in a couple of minutes)

Verify document is named correctly, is in the correct folder and has the correct information when the workflow is complete.

Detail Process

Single Document

Locate your document, right click and select "Update Profile."

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31 items 1 item selected		Properties						

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In this window, enter in the correct and necessary information. You may have more properties—such as Date, Claimant, etc depending on the setup of your county's profile.

Real Estate Documents			
Property	Value		Required
Tax District	640	_	-
Parcel ID	000943501100001		~
Real Estate Doc Type	Homestead Application		× .
Disallowed Year			

Once you have entered the correct information, select Ok to continue.

Update Auto Generated properties	
 Update Bates Number properties Only update property values that changed 	
	OK Cancel

Once a profile property is changed, the Move and Rename workflow will start automatically. It typically will run within a few minutes. The gear icon to the left of the file name indicates it is running. The workflow will move the file to the correct folder location if necessary and rename the file based on the properties entered.

***If the Move and Rename Workflow does not run, please contact our office.

"Solutions" Image Services **Changing a Profile Property in Real Estate Documents** 📕 | 🌛 🔚 🖛 | 9435 Home Share View > 460 > 9435 v ē Search Quick access (S DocLocatorSolutions 🕹 Downloads ۸ Tax District Parcel ID A60_943501100001_Homestead Application.pdf Music 460 000943501100 * A60_943501100001_Homestead Name Pictures 460_943501100001_Homestead Description Videos Version Notes 38.1 KB Size 🎬 Local Disk (C:) Profile Real Estate Documents 🛫 boppedal (\\sol-fs-01\users) (M:) Tax District 460 Parcel ID 000943501100 👳 Recordings (P:) Real Estate Doc Type Homestead Application 👳 Packages (\\calculonfs) (R:)

Once the Workflow is complete, verify that the document is properly named and located in the correct folder.

Multiple Documents at Once

Locate and highlight multiple documents to change to the <u>same</u> profile property at once. Right click and select "Update Profile."

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Clients			Show Differences	
Recorder			Copy	
Creative Cloud Files			History	>
OneDrive			Delete	
This PC			Rename	
3D Objects			Document Notes	
Desktop			Collections	>
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Downloads		-	Update Profile	
31 items 1 item selected			Properties	

Enter the correct property information. Ensure the "Only update property values that changed" box is checked.

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			-
Property	Value		Required
Tax District			
Parcel ID			×
Real Estate Doc Type	Homestead Application	•	×
Disallowed Year			
Update Auto Generated pro	perties		
Update Auto Generated proj Update Bates Number prope	perties rties		

Click Ok to continue.

Once this window opens, ensure that the **only** property showing is the one you want to change/update.



Click Yes to continue.

Once a profile property is changed, the Move and Rename workflow will start automatically. It typically will run within a few minutes. The gear icon to the left of the file name indicates it is running. The workflow will move the file to the correct folder location if necessary and rename the file based on the properties entered.

Once all Workflows are complete, verify that the documents are properly named and located in the correct folder.