

“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

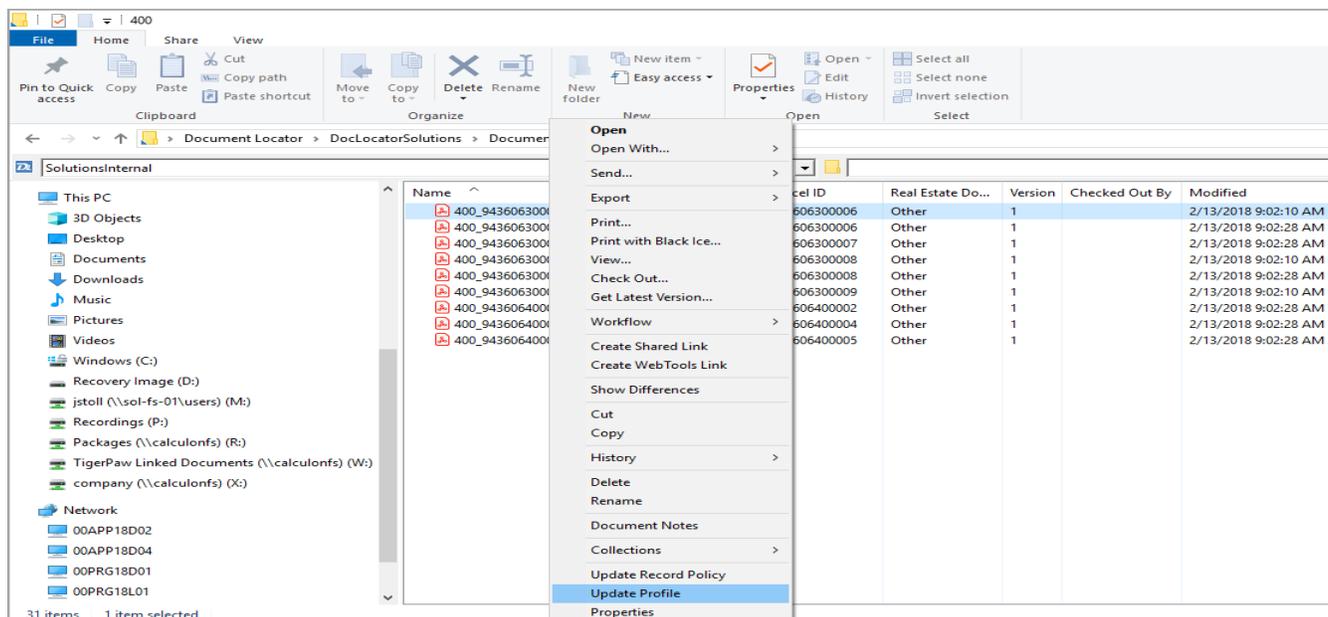
Workflow will automatically run to do a Move and Rename based on the property updated (will run in a couple of minutes)

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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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.

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

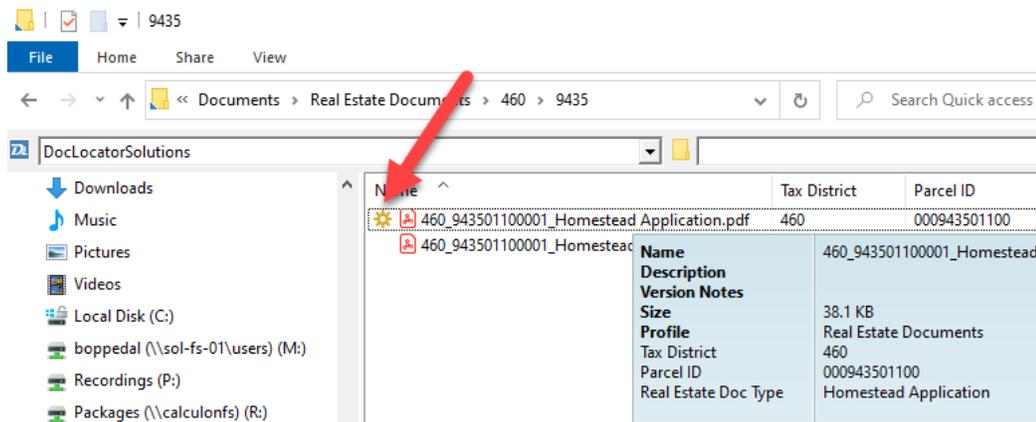
OK Cancel

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.

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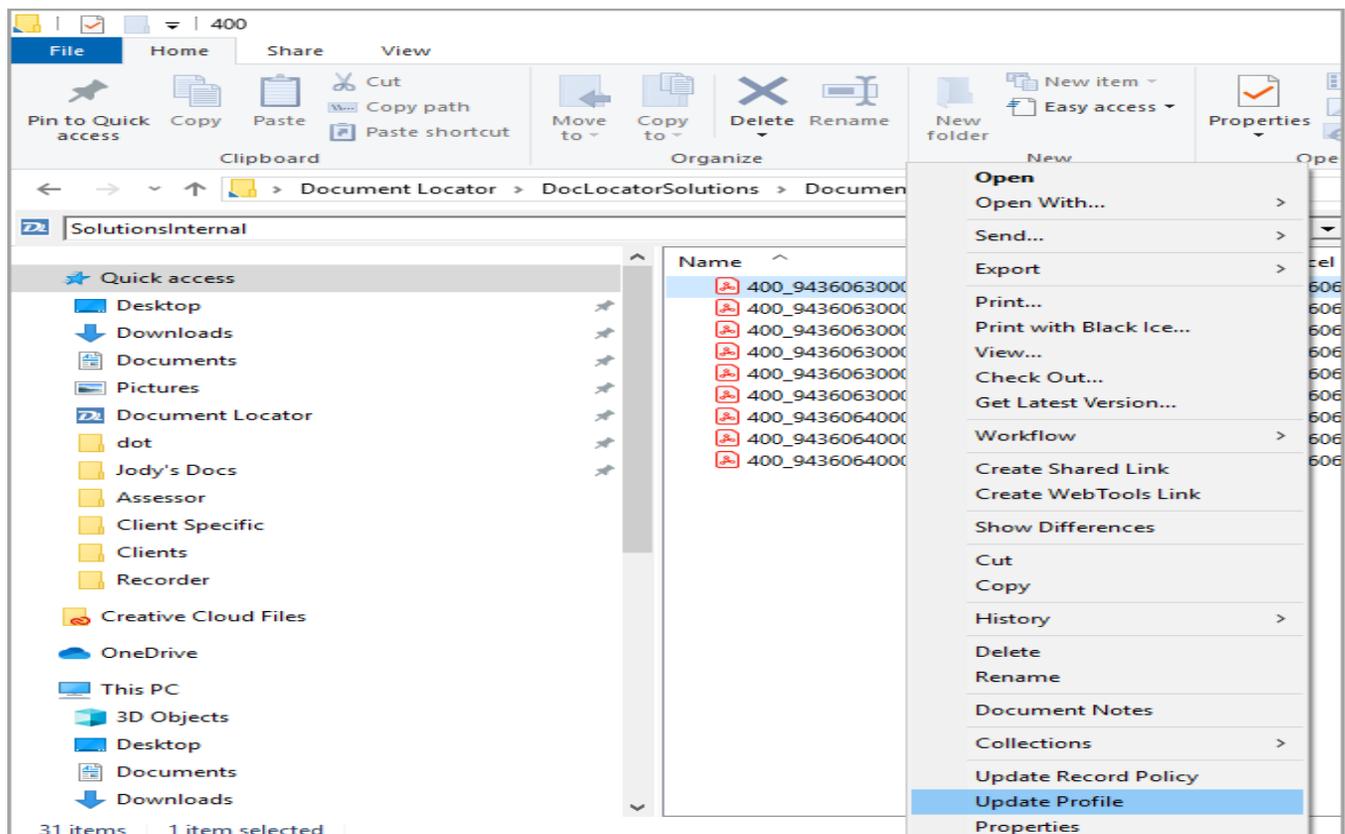
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Once the Workflow is complete, verify that the document is properly named and located in the correct folder.

Multiple Documents at Once

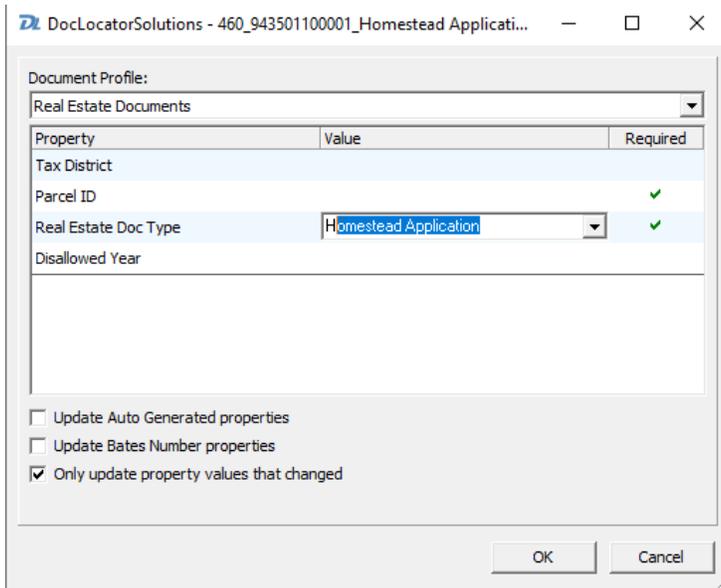
Locate and highlight multiple documents to change to the **same** profile property at once. Right click and select “Update Profile.”



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

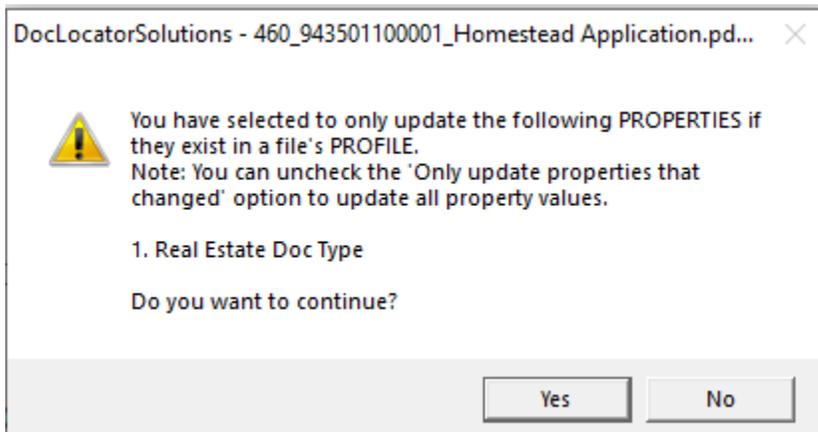
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Click Ok to continue.

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.