

## QUICK REFERENCE GUIDE: PROSUITE™ AND TCOL INTEGRATION



We are pleased to provide the ability to order tax certificates from TCOL directly from a ProSuite™ file. This great feature will eliminate up to 14 additional steps saving valuable time!

With just a few clicks, the necessary information from your ProSuite™ file will be sent to TCOL and a PDF version of the tax certificate will be returned and automatically placed in your file matter folder on your local system. If the municipality is using the new TCOL+ feature, data will also be obtained and will populate your *Taxes* tab saving you even more time.

**If your ProSuite™ billing method is credit card, no further action is required on your part to use this feature.** The cost of the tax certificate will be applied to the credit card that is vaulted in ProSuite™. Instructions on how to switch to credit card payment can be found on page 3.

Skip to the “**How to Order a Tax Certificate**” section on page 2 for ordering instructions.

### Further Steps for Invoice Customers Only

If your ProSuite™ billing method is invoice, in order to use this feature, you will need an APIC account with a default credit card saved to the account. [Click here](#) to register for an APIC account. You may wish to set up one APIC account to be used by all members of your firm or you may wish to set up separate accounts for each notary or lawyer at your firm. It's your choice!

Once you have the APIC credentials, completing the initial setup is easy and should take only a few moments.

### Practitioner Setup

You must have Administrator or Supervisor permissions in ProSuite™ to complete the practitioner setup. From the Main Menu ribbon, click the My Firm button and open the Firm Personnel tab. Select the practitioner you wish to setup.

### APIC Account (TCOL)

Click the **Update Credentials** button, enter the Login ID and Password for the APIC account and click **Validate**.

Setup is complete when you receive a confirmation message that the credentials are valid.

Note: The same Login ID and Password can be entered on multiple practitioners.

The screenshot shows a web form for setting up an APIC (TCOL) account. The form has several input fields: 'Notary or Lawyer' (with a search icon), 'In Trust Name', 'Local Phone Number', 'Commission Expires' (a dropdown menu), 'Firm Administrator' (checkbox), and 'Type' (radio buttons for 'Practitioner' and 'Staff'). Below these fields is a section titled 'APIC (TCOL) Account' containing an 'Update Credentials' button and a sub-form with 'Login ID' and 'Password' fields, and 'Validate' and 'Cancel' buttons.

## How to Order a Tax Certificate

### Data Completion

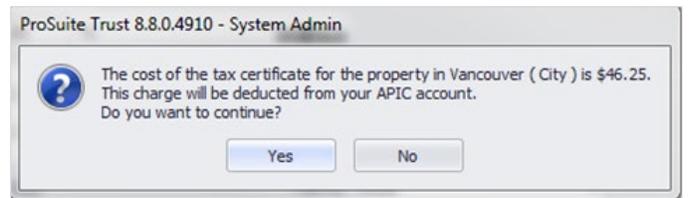
Whether your ProSuite™ billing method is credit card or invoice, the ordering process is the same. A valid PID number or MHR number must be entered in your ProSuite™ file before a tax certificate can be requested.

On the Taxes tab, click the **Obtain & Import from TCOL** button to submit a request for a tax certificate.

The cost of the tax certificate will be presented.

Click **Yes** to confirm that this amount can be deducted from your APIC account.

Clicking **No** will cancel the order process.



A PDF copy of the tax certificate will be obtained and saved in your ProSuite™ file matter folder (as defined in your user settings) on your local system.

If the municipality is using the new TCOL+ feature, data will be provided and will populate the ProSuite™ Taxes tab.

A message will display confirming that the information received from the tax authority has been imported.

If the municipality is not yet using the new TCOL+ feature data is not provided.

A message will display confirming that the PDF only was received from the tax authority.

Click **OK** to continue.



The cost of the tax certificate will populate the Search Cost field for all municipalities.

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The PDF version of the tax certificate will automatically open for your review.

Please note that not all municipalities provide all data. Some additional data entry may be required.

### How to switch your ProSuite™ billing from Invoice to Credit card

If you have not yet transitioned your billing method to credit card, we encourage you to make the switch to take advantage of additional billing and reporting features:

1. Consolidated billing, as payment is made using your ProSuite™ account
2. The cost of the tax certificate will appear on your Statement of Account
3. Your TCOL orders will be shown on your financial transaction summary-CC report

Switching to credit card is simple and only takes one minute. To switch to credit card, your firm administrator will need to access the **My Firm** tab > **Billing** tab > **Payment Method Management** and change the billing payment method to credit card.

### Support

For support with setup and use of this new feature please contact Do Process Customer Support at 1.866.367.7648 or [inquiries@doprocess.com](mailto:inquiries@doprocess.com).

For help with your APIC account, credentials, or tax certificate orders, please contact TCOL at 1.877.953.8253.