

ProSuite™ and TCOL

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.

In order to use this feature, you will need an APIC account with a default credit card. [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!

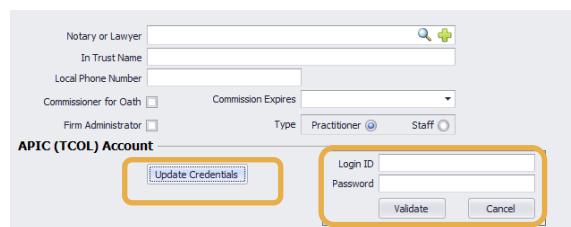
However you choose to setup your APIC account, once you have the necessary credentials, completing the initial setup is easy and should take only a few moments.

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.



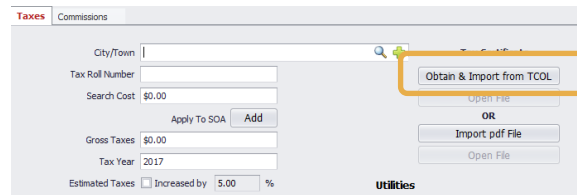
Note: The same Login ID and Password can be entered on multiple practitioners.

ORDERING A TAX CERTIFICATE

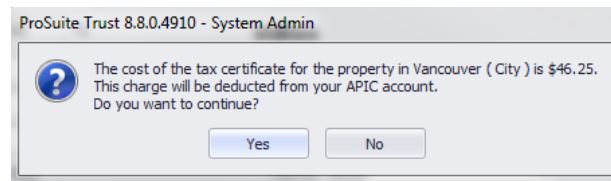
Data Completion

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.



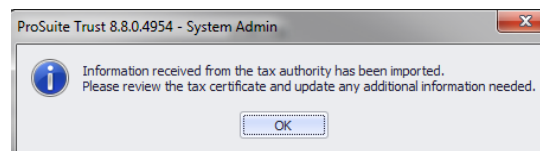
The cost of the tax certificate will be presented. Click *Yes* to confirm that this amount can be deducted from your APIC account.



Clicking *No* will cancel the order process.

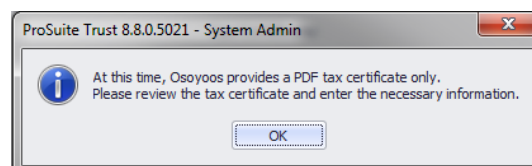
A PDF copy of the tax certificate will be obtained and saved in your ProSuite file matter folder (as defined in your User settings) on your local system.

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.

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.

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.

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