

Attorneys Title Guaranty Fund, Inc. User Guide (v1.0)

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Table of Contents

Introduction	5
ATGF Integration	6
Access from the 360 Services Menu	6
Order Linking	6
Welcome	7
Login Screen	8
Submitting an Order	9
Title Services Screen.....	9
File Information Screen	10
Add Product Launcher Screen	13
Order Products from ATGF’s EPIC Portal	15
Order a Product – CPL, Commitment, Policy Jacket.....	15
360 Order Queue	19
Review Screen - Accepting Documents and Data	20

Table of Figures

Figure 1–SoftPro 360 Services Menu	6
Figure 2–Order Linking Screen	6
Figure 3–Welcome Screen	7
Figure 4–Login Screen	8
Figure 5–Invalid State Notification	8
Figure 6–360 Title Services Screen	9
Figure 7–File Information -> Property Details	10
Figure 8–File Information -> Order Contacts	11
Figure 9–File Information -> Product Details.....	12
Figure 10–Eligibility Question Screen	13
Figure 11–Intermediary Screen Displaying Import Data from SoftPro.....	14
Figure 12– EPIC File.....	15
Figure 13–Issuing a Commitment	16
Figure 14–Notification of Successful Issuance.....	16
Figure 15–Button to Remit Commitment to SoftPro.....	17
Figure 16–Issuing a Policy	17
Figure 17–Notification of Successful Issuance.....	18
Figure 18–SoftPro 360 Queue: After Submitting an Order.....	19
Figure 19–SoftPro 360 Queue: When 360 Receives Remit.....	19
Figure 20–Title Services Screen -> Ready Status	20
Figure 21–Details Screen	21
Figure 22–Review Screen.....	22
Figure 23–Details Screen -> All products Accepted	23
Figure 24–Title Services Screen -> Transaction Status = Accepted.....	24
Figure 25–360 Queue -> Transaction Status = Accepted.....	24
Figure 26–Order Attachments	25

Introduction

The ATGF Integration with SoftPro 360 automates the delivery and receipt of the following products:

- Closing Protection Letter (CPL)
- Policy Jackets
- Commitments

If you choose to order products from ATGF, your ProForm data will be submitted in a transaction to ATGF and you will be redirected to ATGF's EPIC website where you will be able to order/issue any one or all of the products listed above based on the ProForm data you submitted and any additional information you choose to add or update while in EPIC. Once the products are successfully issued, they will be delivered to 360 where you'll be able to accept documents and specified data back to your ProForm order.

ATGF Integration

Access from the 360 Services Menu

From the **360** → **Services** menu, double-click **ATGF – Attorneys Title** located under the **Underwriter Services** folder. This will open the Order Linking screen:

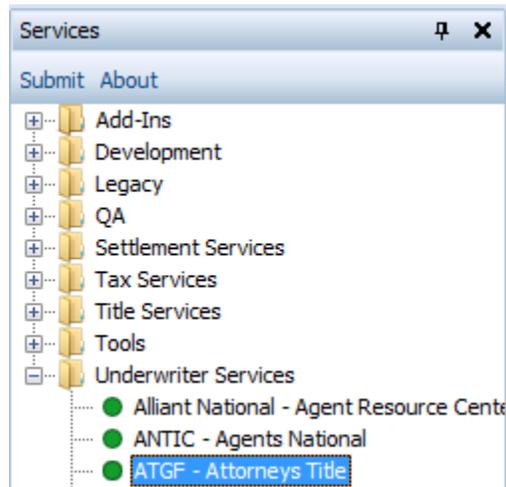


Figure 1–SoftPro 360 Services Menu

Order Linking

From the **Order Linking** screen, select the ProForm order to be sent to ATGF:

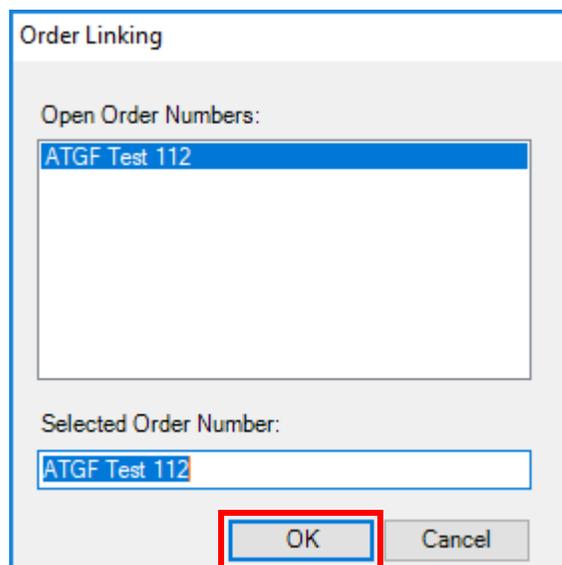


Figure 2–Order Linking Screen

- All orders that are currently opened will be listed in the Open Order Numbers pane. The selected Order Number field will populate with the current active ProForm order. You may select an order from any of the open orders, or you may choose to overwrite the Selected Order Number field with an order that is not currently open. Once you have confirmed an order to link, click **OK** to continue to the Welcome screen.

Welcome

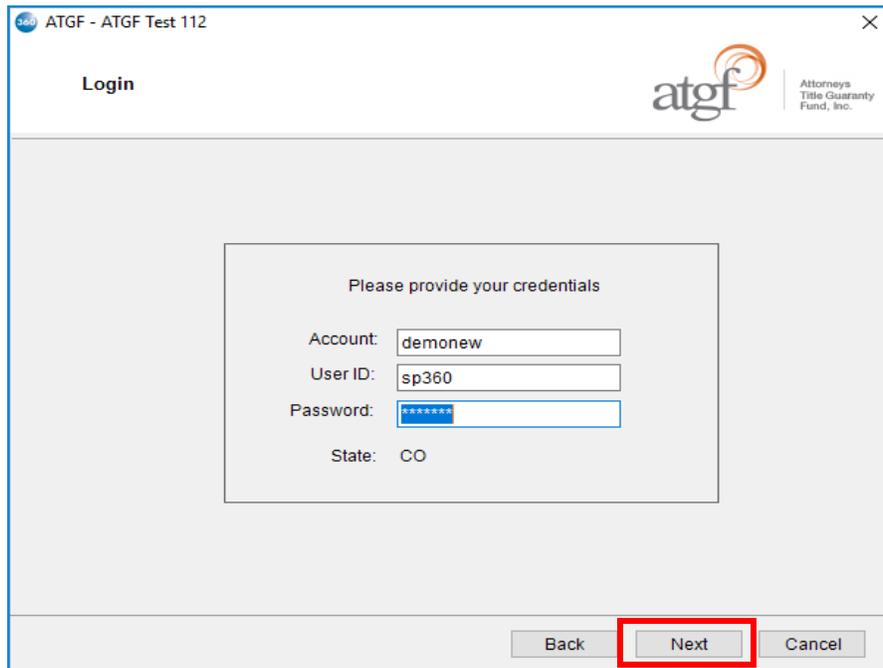
From the **Welcome** screen, click **Next** and go to the Login screen. Click the **Skip Welcome Page** checkbox to bypass this screen during future sessions.



Figure 3–Welcome Screen

Login Screen

The **Login** screen requires you to enter your **Account**, **User ID** and **Password**. This should be the same account and credential information that you would use to log in to ATGF's **EPIC** system. The **State** field will display a read-only value of the property state from your ProForm order. Clicking **Next** will take you to the Title Services Screen.



The screenshot shows a web browser window titled "ATGF - ATGF Test 112". The page has a "Login" header and the ATGF logo (Attorneys Title Guaranty Fund, Inc.). The main content area contains a form titled "Please provide your credentials" with the following fields:

- Account:
- User ID:
- Password:
- State:

At the bottom of the form are three buttons: "Back", "Next" (highlighted with a red box), and "Cancel".

Figure 4–Login Screen

You will receive a notification if ATGF is unable to perform the import for the property state in your ProForm order. In this case, you will be prevented from continuing until you change the state in your ProForm order to a valid state.

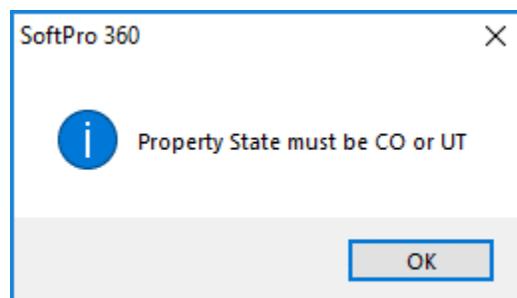


Figure 5–Invalid State Notification

Submitting an Order

Title Services Screen

After clicking **Next** on the Welcome screen, you will navigate to the 360 **Title Services** screen. From here, you'll be able to:

- Navigate to EPIC to order one or more of the following ATGF products: CPL, Policy Jacket and/or Commitment.
- View data from your ProForm order that will be submitted to ATGF to order a product.
- View the 360 transactions that were generated when requesting products from ATGF.
- View the specific products that were issued under each of the 360 transactions.

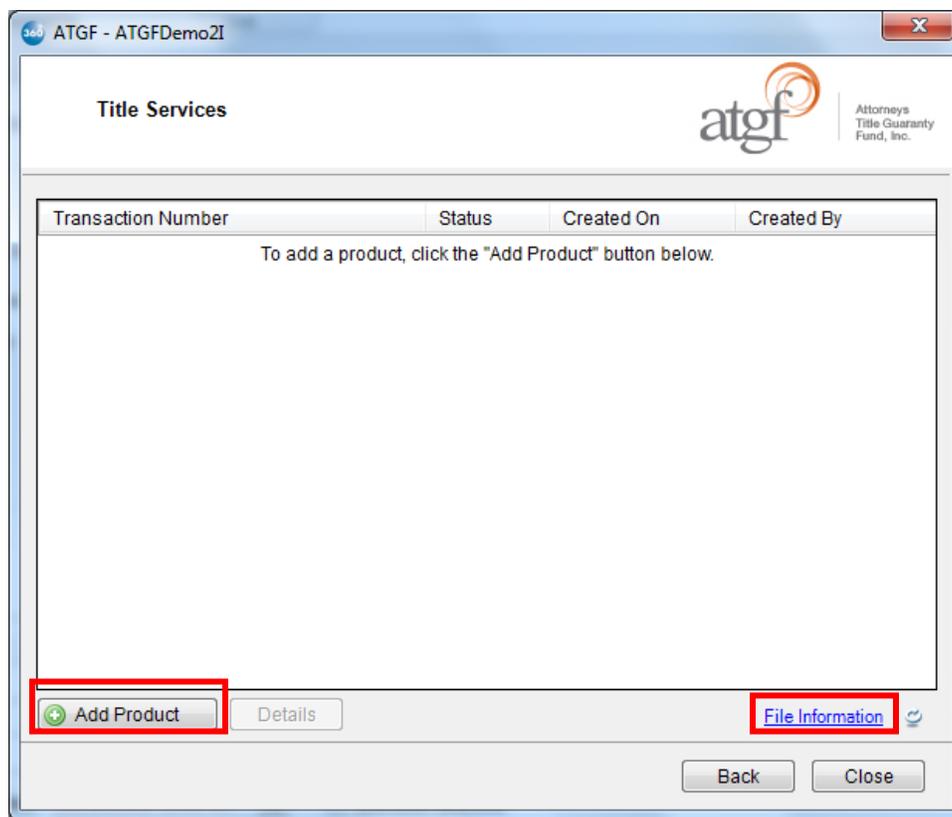


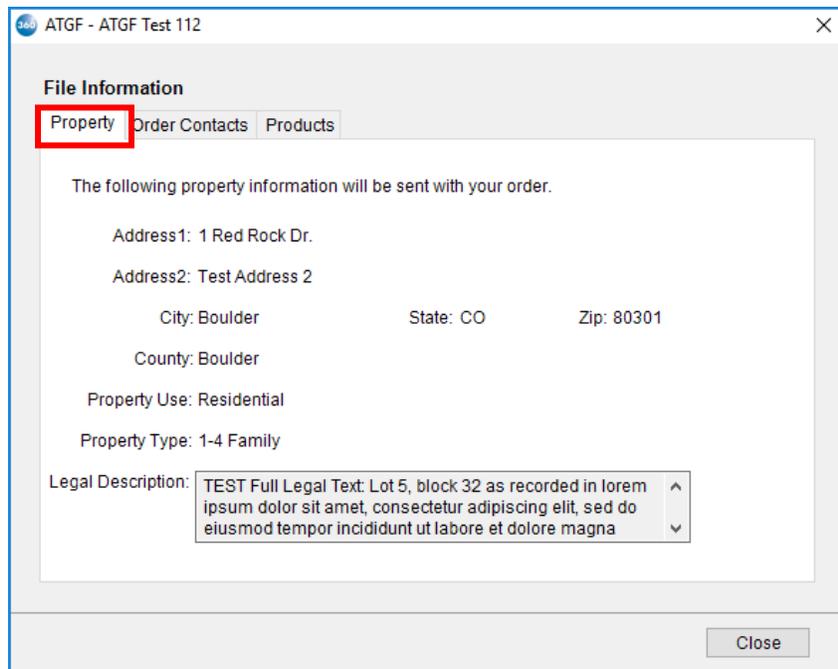
Figure 6–360 Title Services Screen

File Information Screen

The File Information screen will display information from your ProForm order that will be submitted to ATGF. This will help you view the data before submitting the product request to ATGF. Click **Close** to return to the Title Services screen.

Property Information

If you have multiple properties in your ProForm order, then only the first property listed in your order will display and will be sent to ATGF.



The screenshot shows a window titled "ATGF - ATGF Test 112" with a close button in the top right corner. The window contains a "File Information" section with three tabs: "Property", "Order Contacts", and "Products". The "Property" tab is selected and highlighted with a red box. Below the tabs, a message states: "The following property information will be sent with your order." The property details are listed as follows:

- Address1: 1 Red Rock Dr.
- Address2: Test Address 2
- City: Boulder State: CO Zip: 80301
- County: Boulder
- Property Use: Residential
- Property Type: 1-4 Family
- Legal Description: TEST Full Legal Text: Lot 5, block 32 as recorded in lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna

A "Close" button is located at the bottom right of the window.

Figure 7–File Information -> Property Details

Order Contacts

If the following contact types are available in your ProForm order, SoftPro 360 will send this information to ATGF: Buyer, Seller, Lender, Mortgage Broker, Settlement Agent, Listing Agent, and Selling Agent.

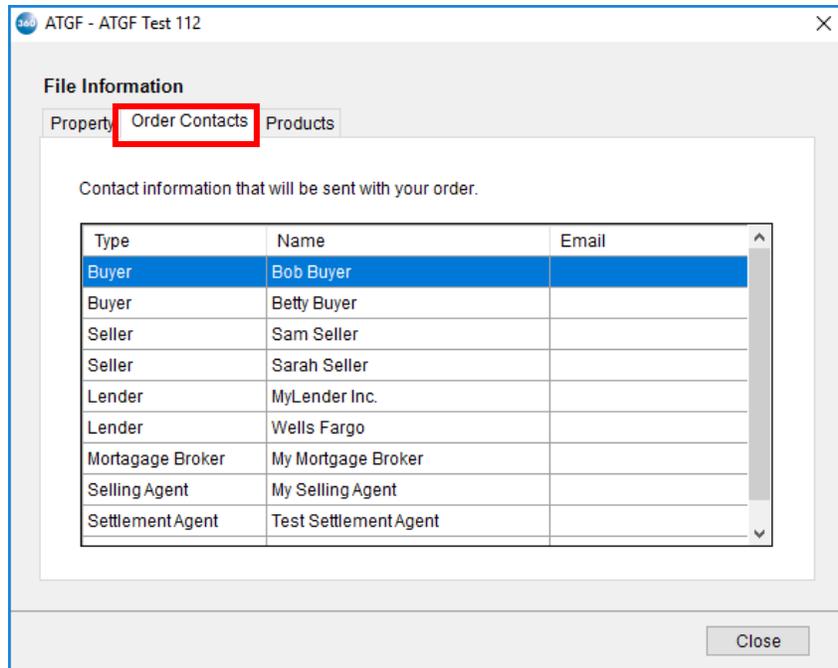


Figure 8–File Information -> Order Contacts

Products Information

The Products tab will display products that are currently in your ProForm order.

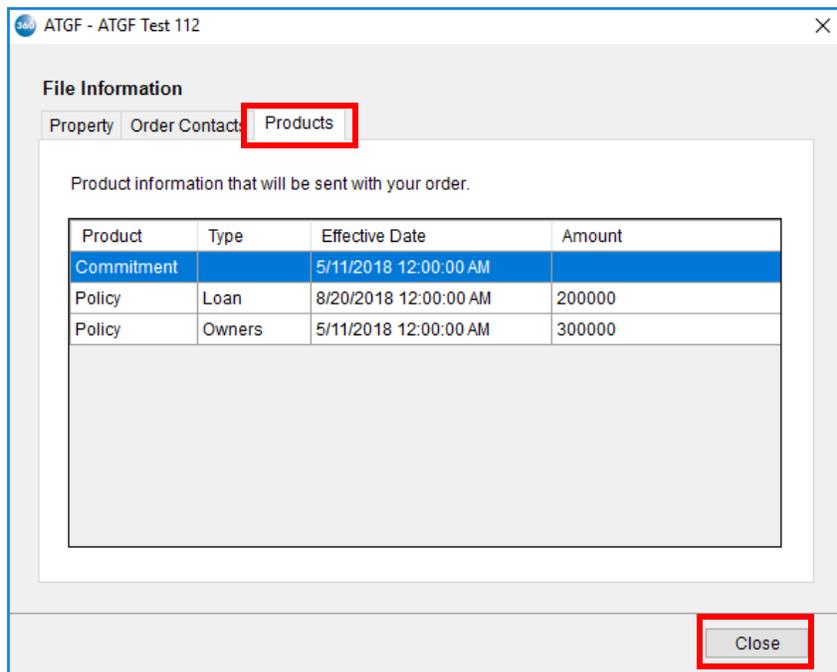


Figure 9–File Information -> Product Details

Add Product Launcher Screen

Clicking the **Add Product** button from the 360 Title Services screen will navigate you to the landing page on ATGF’s EPIC website where you will be able to issue products from their site. When you navigate to EPIC from your ProForm order, you will be prompted to answer an eligibility question. You will be prompted to answer this question every time you click *Add Product* for a ProForm order, but EPIC will only import your first answer for a particular order.

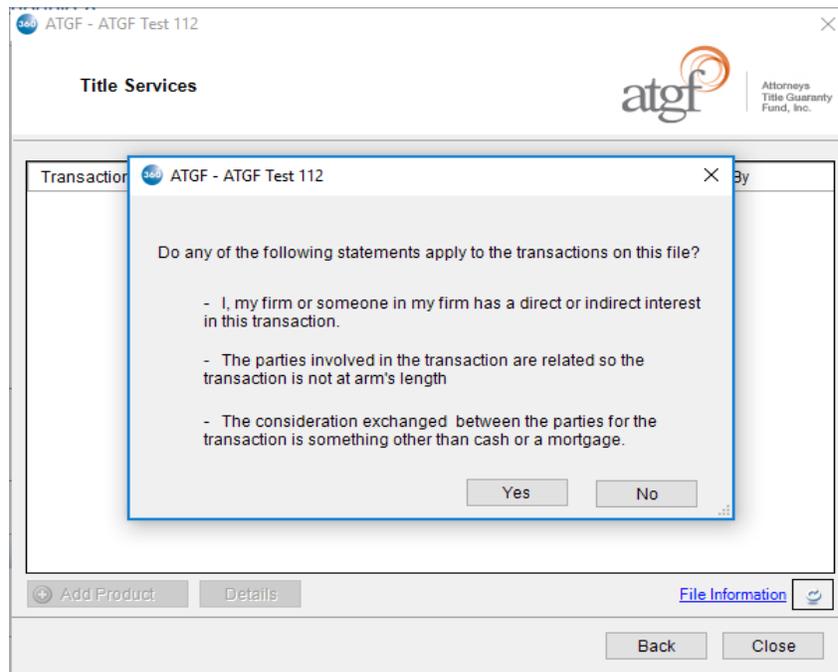


Figure 10–Eligibility Question Screen

- Once you are in the ATGF portal, you will land on the Summary Information screen prior to being taken to the EPIC file. The Summary Information screen displays your ProForm data imported from 360. You can review this data and add other information for your order. The tabs displayed on the left will also take you to screens with information that you can review and add data to as necessary. A red warning icon indicates that there is information on that screen that requires your attention.
- After reviewing your data, the **Go to EPIC file** tab will take you to the corresponding EPIC file that includes the data you have just reviewed.

The screenshot shows the ATGF Summary Information screen for File # ATGF Test 112. The interface includes a top navigation bar with 'File', 'Tools', 'Reports', 'Main', and 'Log Off' buttons, along with the ATGF logo and 'EPIC' branding. Below the navigation bar, there is a 'Current Login: demonew / SP360' indicator and a 'POLICY ISSUANCE TOOLBAR™' with a 'CPL' dropdown menu and buttons for 'Pre-Approve', 'Commitment', and 'Policies'. The main content area is divided into a left sidebar and a main panel. The sidebar contains links for 'Summary Information', 'Owner Policy Details', 'Lender Policy Details', 'Commitment', 'Endorsements', and 'Go to EPIC file' (highlighted with a red box). The main panel displays the following information:

Summary Information	
File Number	ATGF Test 112
Transaction Type	Purchase
Purchase Price \$	500,000.00
Policy Date	5/11/2018
Purchaser/Borrower	
Name	Bob Buyer
Name	Betty Buyer
Seller	
Name	Sam Seller
Name	Sarah Seller
Property Address	
Full Address	1 Red Rock Dr. Test Address 2, Unit 103-A, Boulder, Colorado 80301
Legal Description	
TEST Full Legal Text: Lot 5, block 32 as recorded in lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. lorem ipsum dolor sit amet, consectetur adipiscing elit. sed do eiusmod	
Property Information <input type="button" value="enter/edit"/>	
Interest Insured:	Property Use:
Fee simple	1-4 Residential
<input type="checkbox"/> Leasehold Indicator <input type="checkbox"/> Time Share <input type="checkbox"/> Conservation Easement <input type="checkbox"/> Easement Estate <input type="checkbox"/> Mobile/Manufactured Homes	
Changing property information may adjust your policy rate.	

Figure 11–Intermediary Screen Displaying Import Data from SoftPro

Order Products from ATGF's EPIC Portal

Order a Product – CPL, Commitment, Policy Jacket

Your EPIC file is now populated with the data from your ProForm order in both the **Policy** and **Exceptions / Endorsements** screens. You will be able to review and update data and issue a CPL, Commitment and/or Policy Jacket as you normally would in EPIC.

File #: ATGF Test 122

File Number: ATGF Test 122

Transaction ID: 410060-70-180820-109237Transaction

Transaction Type: Purchase

Purchase Price \$: 350,000.00

Purchaser/Borrower Name: Bruce Mesner, Betty Buyer

Seller Name: Steve McDougal

Policy Date: 8/20/2018

Lender Policy Details:

Lender	Loan #	Type	Policy #	Policy Amount	Construction Loan
MyLender Inc.	12312	Standard 2006	TBA	200,000.00	<input type="checkbox"/>

Figure 12– EPIC File

Example: Ordering a Commitment

- Click on the **Commitment** tab, then click **Issue New Commitment**.

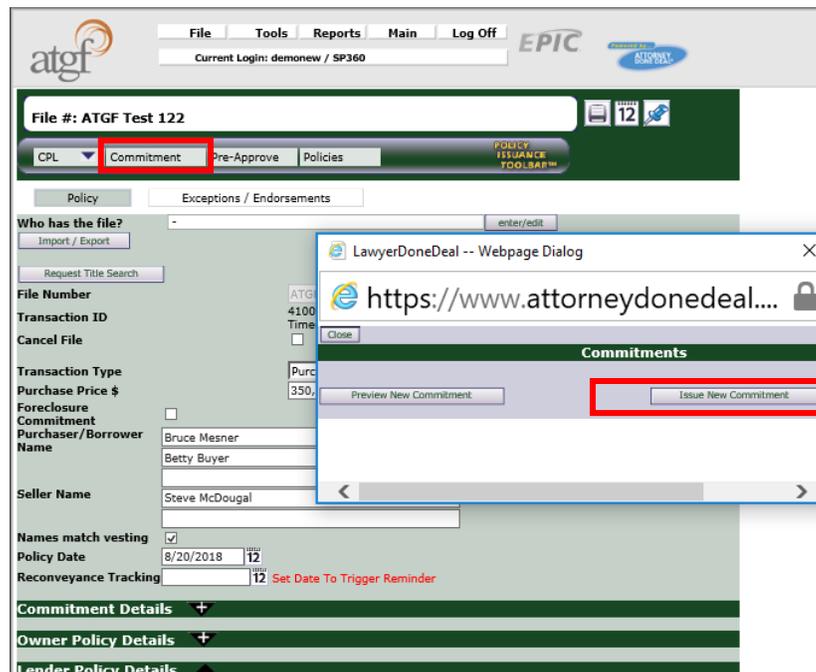


Figure 13—Issuing a Commitment

- Once it is issued successfully, click **OK**.

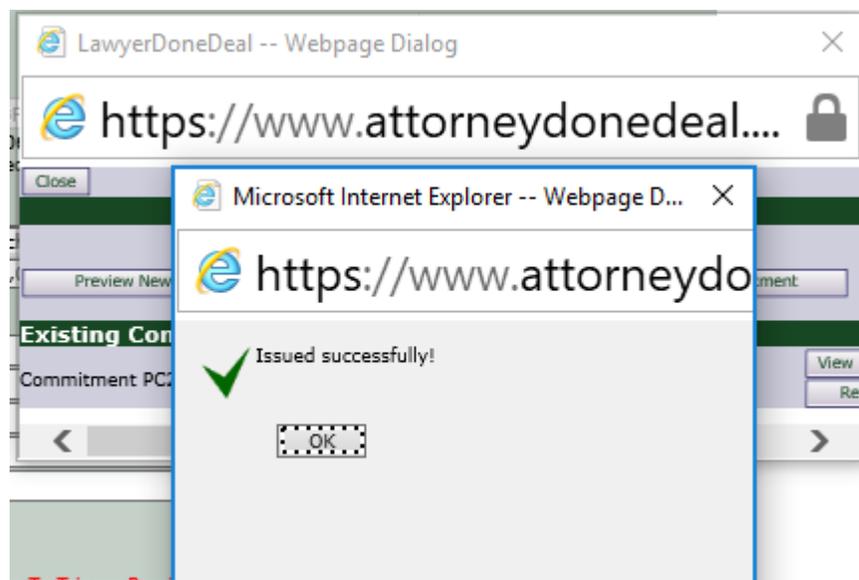


Figure 14—Notification of Successful Issuance

- Click the **Remit to SoftPro** button to send the policy to SoftPro 360.



Figure 15–Button to Remit Commitment to SoftPro

Example: Ordering a Policy

- Click **Policies** and then click **Issue and Remit Policies**.

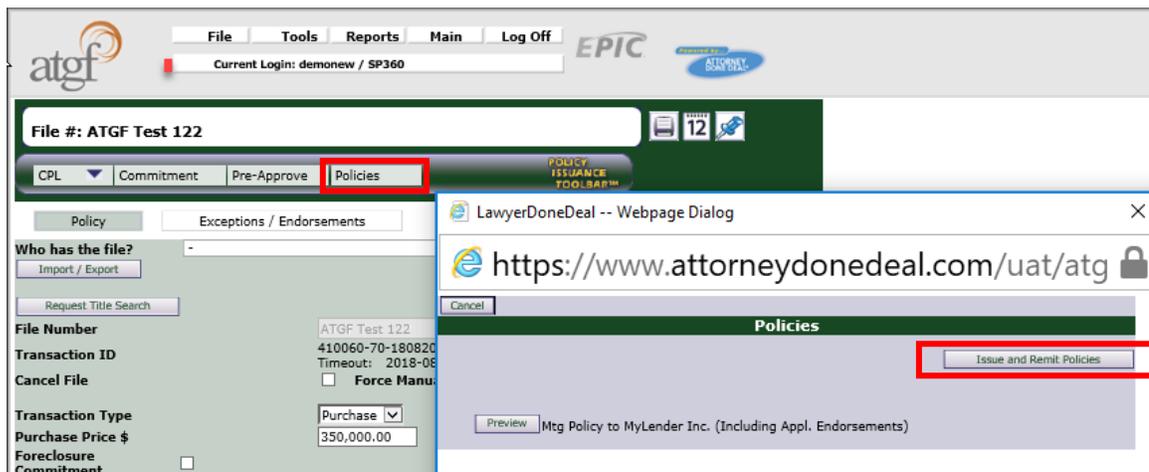


Figure 16–Issuing a Policy

- Issue the policy by clicking **OK**.

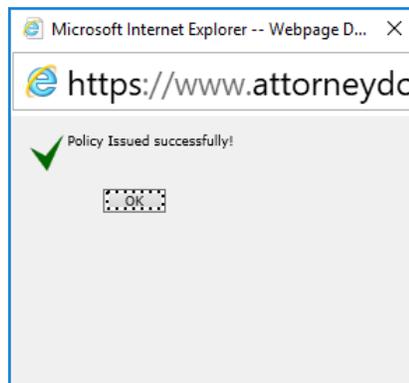
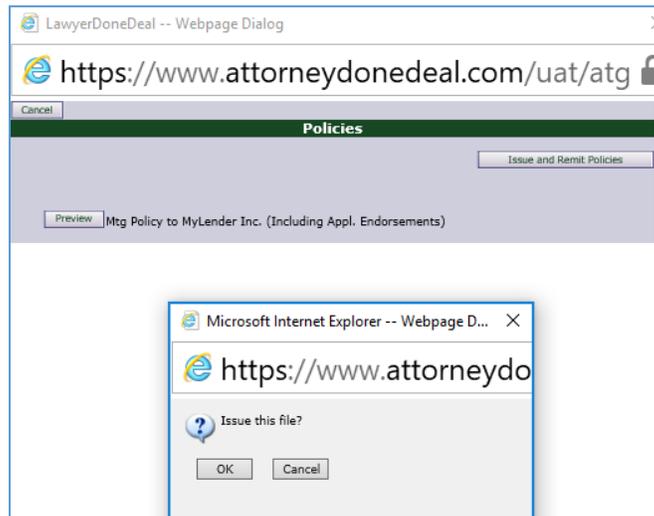


Figure 17–Notification of Successful Issuance

360 Order Queue

Within the SoftPro 360 queue, an **In Progress** transaction will be created when an order is submitted to ATGF. The transaction will display the ProForm order name, which is the linked order column.



The screenshot shows a software interface titled 'Queue'. At the top, there is a navigation bar with a 'Next Step' button (a green checkmark in a circle), a 'Views' dropdown menu set to 'Active Order', and a 'Filter' dropdown menu set to 'All Providers'. Below this is a table with the following columns: Provider, Service, Status, Linked Order, Linked Profile, Created By, and Created On. The table contains one row with the following data: Provider: ATGF, Service: CPL, Jacket and Commitment, Status: In Progress (highlighted with a red box), Linked Order: ATGFDemo2I, Linked Profile: Default, Created By: Ravindra, and Created On: 7/19/2018 3:40 PM.

Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On
ATGF	CPL, Jacket and Commitment	In Progress	ATGFDemo2I	Default	Ravindra	7/19/2018 3:40 PM

Figure 18–SoftPro 360 Queue: After Submitting an Order

- When ATGF remits the product documents and data fields to 360, the transaction will update to a **Ready** status.



The screenshot shows the same software interface as Figure 18. The 'Status' column in the table now displays 'Ready' (highlighted with a red box) instead of 'In Progress'. The 'Created On' timestamp has updated to 7/19/2018 4:10 PM.

Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On
ATGF	CPL, Jacket and Commitment	Ready	ATGFDemo2I	Default	Ravindra	7/19/2018 4:10 PM

Figure 19–SoftPro 360 Queue: When 360 Receives Remit

- On click of **Next Step**, you may proceed to the Title Services Screen to review and accept the documents sent by ATGF. You will need to re-login while accessing the order on 360. The status of the transaction will reflect as **Ready**.

Review Screen - Accepting Documents and Data

From the Title Services Screen, click on the **Details** button to redirect to the details screen and access the products you have ordered from ATGF's EPIC portal.

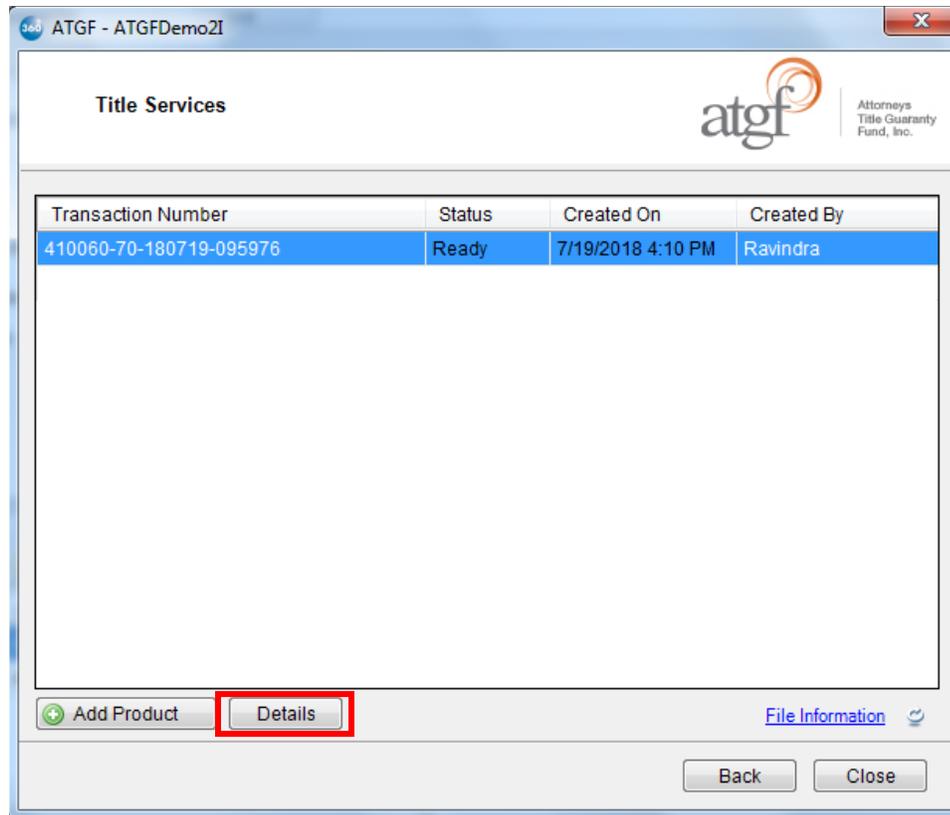


Figure 20–Title Services Screen -> Ready Status

- The details screen will display the products ordered by the user from EPIC. Double-click on any product or click on the icon under the Action column to redirect to the review screen.

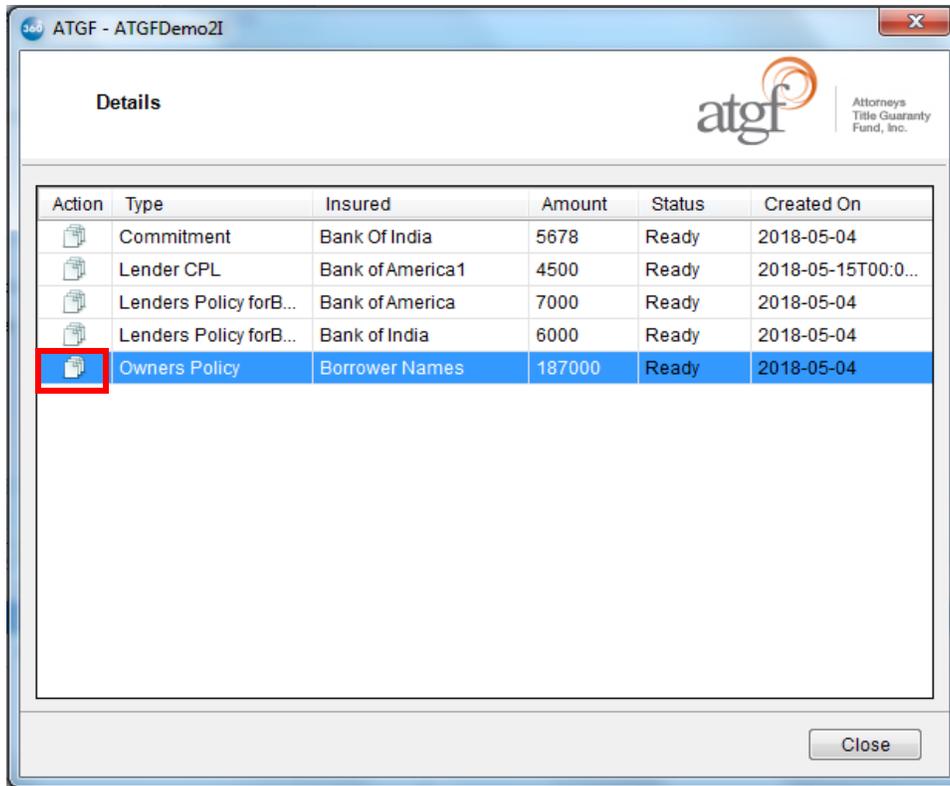


Figure 21–Details Screen

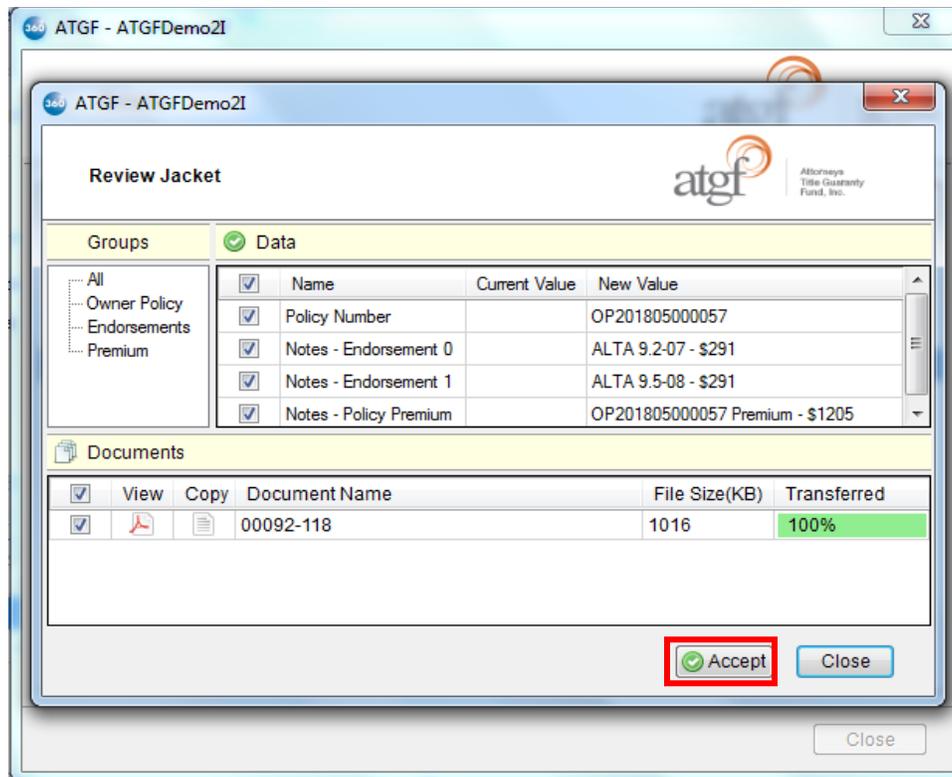


Figure 22–Review Screen

- From the **Review** screen, you will be able to view, copy and accept the documents and data sent from ATGF.
- The Review screen allows documents to be viewed by clicking the **View** icon. Click **Accept** to add the documents to the linked ProForm order. The documents will be available from within the linked ProForm order by clicking on the **Attachments**. If the documents should not be accepted, the **Cancel** button closes the Review screen and no documents will be accepted. On clicking **Accept**, the status of that product is changed to *Accepted* in the Details screen. On accepting all products remitted by ATGF, the statuses of all products and hence the transaction status then changes to *Accepted* in the Title Services screen as well as in the SoftPro 360 Queue.

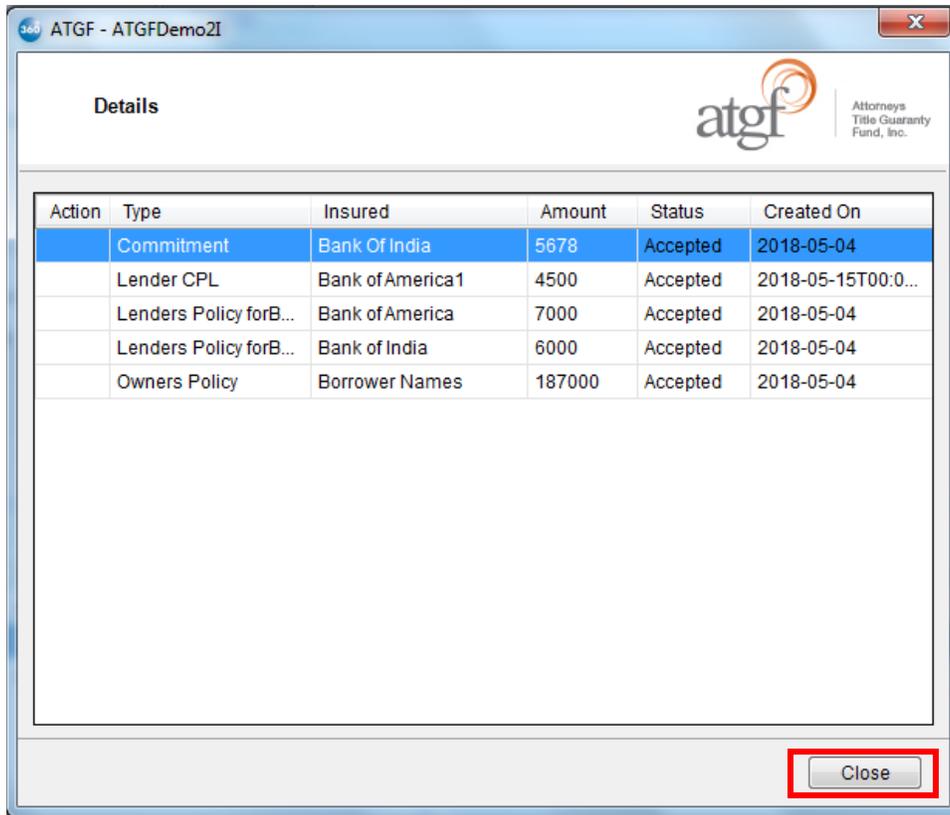


Figure 23–Details Screen -> All products Accepted

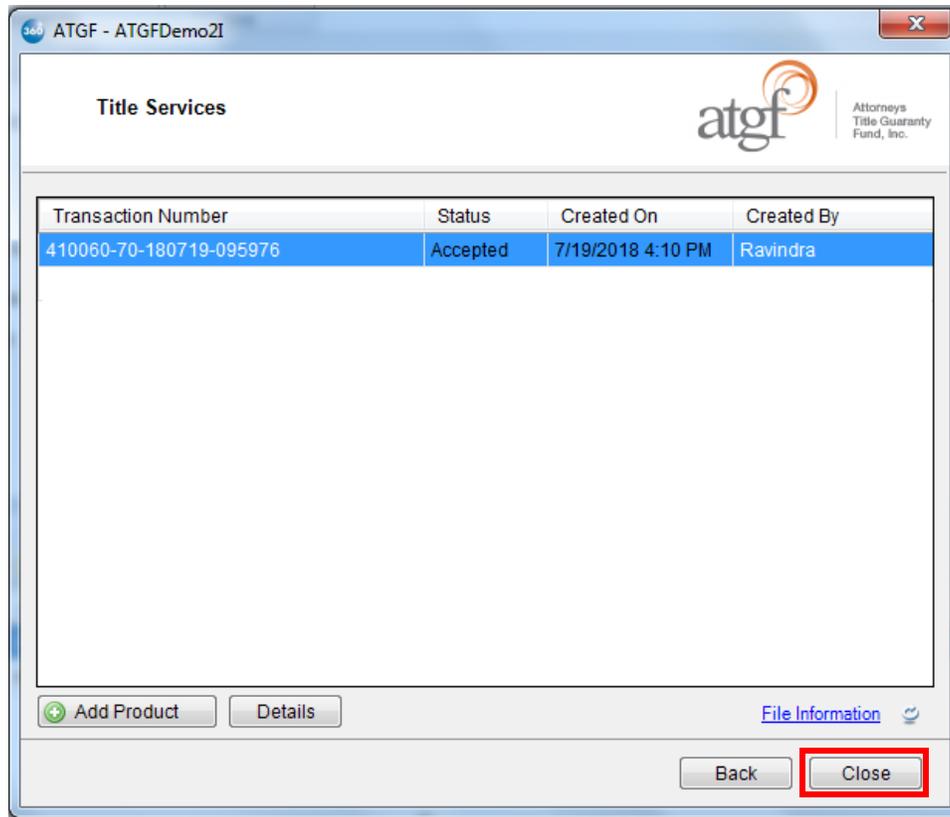


Figure 24–Title Services Screen -> Transaction Status = Accepted



Figure 25–360 Queue -> Transaction Status = Accepted

- The accepted documents will be saved in your SoftPro order attachments and can be used for future reference by accessing the concerned SoftPro order.

The screenshot shows the 'Attachments' section of the SoftPro 360 interface. The 'Attachments' menu item is highlighted with a red box. Below the navigation bar, there is a table listing the attachments.

Name	Description	Type	Source	Size
00092-118	00092-118	Adobe Acrob...	Attached	1,016 KB
00092-119	00092-119	Adobe Acrob...	Attached	99 KB
3177_PC201805000056	3177_PC20180...	Adobe Acrob...	Attached	69 KB
ABC	ABC	Adobe Acrob...	Attached	99 KB
CPL1	CPL1	Adobe Acrob...	Attached	48 KB

Figure 26–Order Attachments