

# FATIC - AgentNet CPL User Guide

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July, 2023

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## History

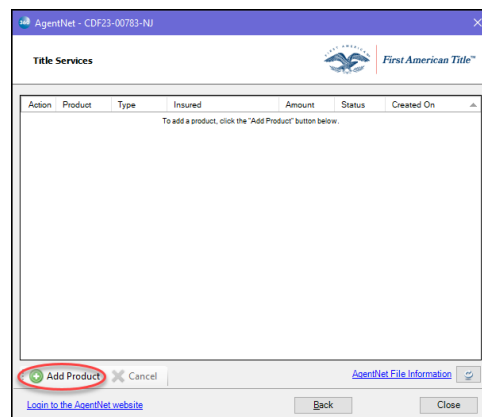
Date	Details
July 2023	Separating user guides per-product

## Introduction

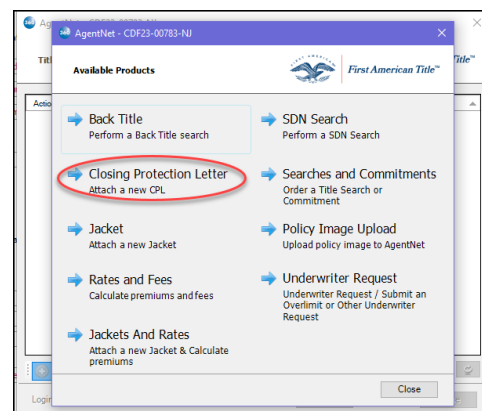
Using the ProForm order's information, this Closing Protection Letter (CPL) product will allow a user to simultaneously order and receive a CPL without leaving the integration.

## Requesting a Closing Protection Letter

1. To order a Closing Protection Letter, click the **Add Product** icon at the bottom of the **Title Services** screen.



2. On the **Available Products** screen, select **Closing Protection Letter**.



- The highlighted data will pre-populate the **Closing Protection Letter** screen from the ProForm Order.

If there are multiple loans the ProForm order, select the Lender needing a CPL.

If there are multiple parties needing CPLs, selections can be made by checking or unchecking the **Covered** check box(es).

Additional options are available to be selected as needed. Once all selections have been made, click **Next**.

**Note:** Available options on CPL screens are determined by the AgentNet credentials used to log in along with the property state

- The highlighted data will pre-populate the **Lender Selection** screen from the ProForm Order.

Note: The Lender Clause information is retrieved from the Order Contact screen in ProForm.

The fields on this screen can be overwritten. Any changes to the information on this screen will **NOT** write back to the Order.

Information from this screen can be saved for future use by selecting the **Save to "My Lenders" list on AgentNet** check box.

Click **Next** to advance to the Settlement Provider screen.

- In States where approved attorneys are required, an **Attorney** screen will populate the default Attorney from AgentNet or an Attorney can be searched from a list by entering their name and city.


Click **Search/Submit** to continue.

- The **Settlement Provider Selection** screen lists all available settlement agents.

The fields on this screen can **NOT** be overwritten.

Click **Submit** to proceed.

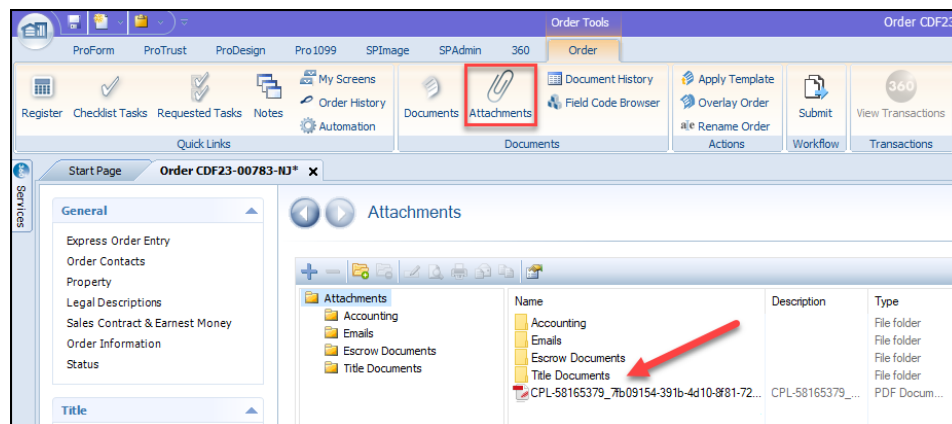
- Once the order is processed, any documents requested will populate in the **Review Documents** screen.

The View icon  allows a document to be viewed prior to accepting into the ProForm order.

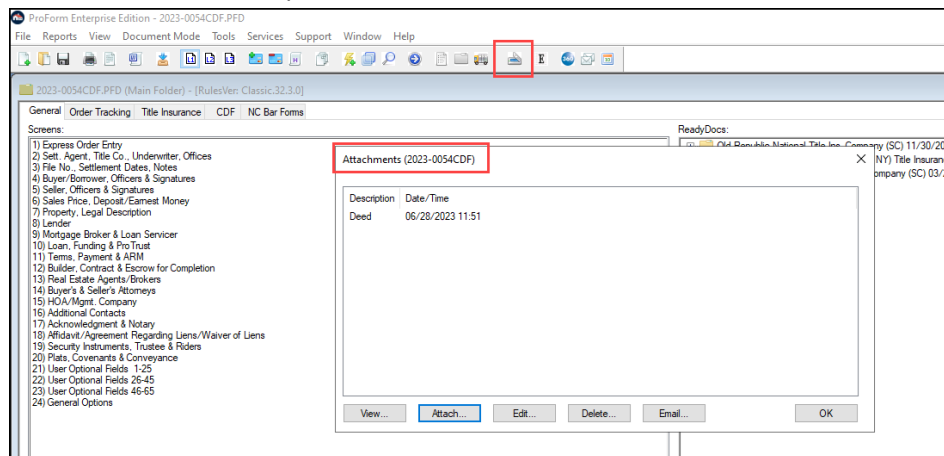
By clicking the **Accept** button, the documents will populate into the ProForm Order.

- The CPL document will be in the **Attachments** section on the order's ProForm Ribbon.

In SoftPro Select

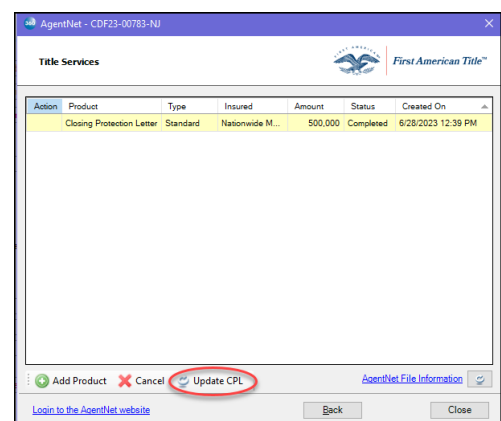


In SoftPro Standard or SoftPro Enterprise



## Updating a Closing Protection Letter

- To update a Closing Protection Letter, click the **Update CPL** icon at the bottom of the **Title Services** screen.



- The highlighted data will pre-populate the **Closing Protection Letter** screen from the ProForm Order.

Additional options are available to be selected as needed. Once all selections have been made, click **Next**.

AgentNet - CDF23-00783-NJ

AgentNet - Closing Protection Letter - CDF23-00783-NJ

First American Title Insurance Company

Select the Type: Standard Loan Number: 13456789

Closing Date: 07/28/2023 Loan Amount: 500,000.00

Covered Party Address Type Line 1 Line 2 City State Zip

☒ Lender

Closing Protection Letter Options

☐ Cash Sale ☐ Add Second Party

☐ List Firm Locations on Attachment ☐ Use Missouri CPL

☐ List Firm Signatories on Attachment Alternate File No: [ ]

Back Next Cancel

Login to the AgentNet website

- The highlighted data will pre-populate the **Lender Selection** screen from the ProForm Order.

Note: The Lender Clause information is retrieved from the Order Contact screen in ProForm.

The fields on this screen can be overwritten. Any changes to the information on this screen will **NOT** write back to the Order.

Information from this screen can be saved for future use by selecting the **Save to "My Lenders" list on AgentNet** check box.

AgentNet - CDF23-00783-NJ

AgentNet - Closing Protection Letter - CDF23-00783-NJ

First American Title

Lender Selection

Filter: [ ]

Source	Name	City
ProForm	Nationwide Mortgage	Cary
AgentNet	82	New York
AgentNet	82 Server_9119	New York
AgentNet	ABC Bank, 123	Camden, NJ

Address 1: 5508 Dillard Drive Attn: [ ]

Address 2: [ ] Phone: (919) 233-1221

City: Cary Fax: [ ]

State: NC Zip: 27809 Email: [ ]

Lender Clause: ISAOA/ATIMA

☐ Save to "My Lenders" list on AgentNet

Back Next Cancel

Login to the AgentNet website

Click **Next** to advance to the Settlement Provider screen.

- The **Settlement Provider Selection** screen lists all available settlement agents.

The fields on this screen can **NOT** be overwritten.

Click **Submit** to proceed.

AgentNet - CDF23-00783-NJ

AgentNet - Closing Protection Letter - CDF23-00783-NJ

First American Title

Settlement Provider Selection

Filter: [ ]

Source	Name	City
AgentNet	ABC Settlement Services, 987 Sample Drive, Pittsburgh	Pittsburgh
AgentNet	Adam Attorney	test city
AgentNet	Akhil Venugopal	[ ]

Name: [ ]

Full Name: ABC Settlement Services, 987 Sample Drive, Pittsburgh, PA, 15205

Address: 987 Sample Drive Suite 100

City/State/Zip: Pittsburgh PA 15205

Phone: ( ) - Fax: ( ) -

Email: [ ]


☐ Skip Closing Attorney

Back Submit Cancel

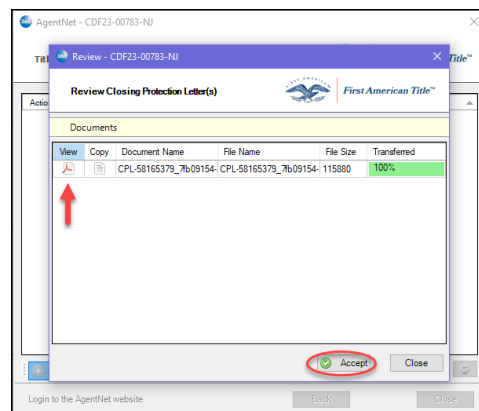
Login to the AgentNet website



5. Once the order is processed, any documents requested will populate in the **Review Documents** screen.

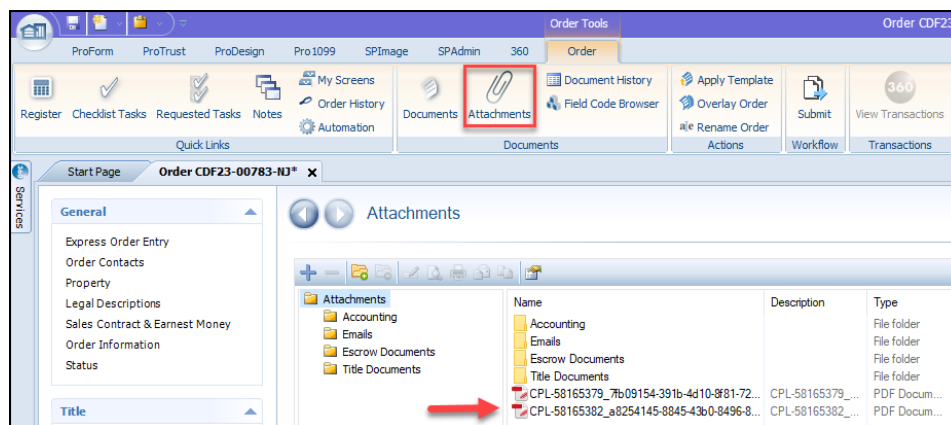
The View icon  allows a document to be viewed prior to accepting into the ProForm order.

By clicking the **Accept** button, the documents will populate into the ProForm Order.

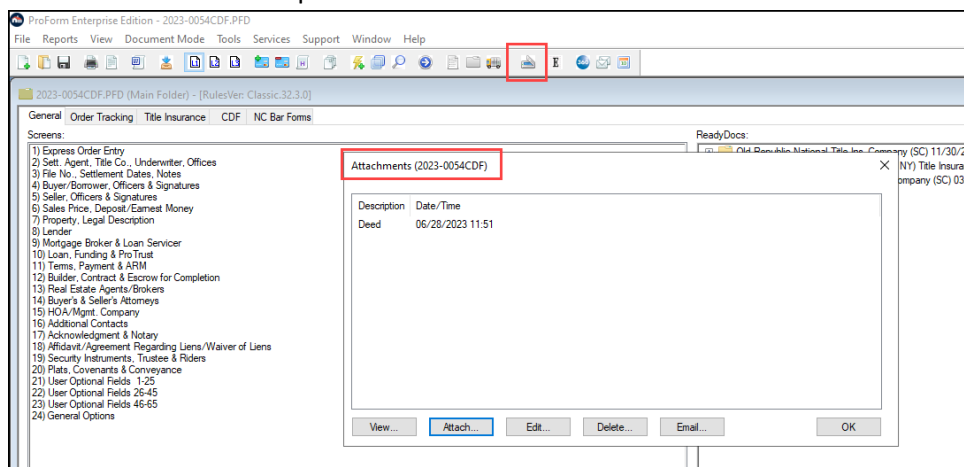


6. The new CPL document will be in the **Attachments** section on the order's ProForm Ribbon.

In SoftPro Select

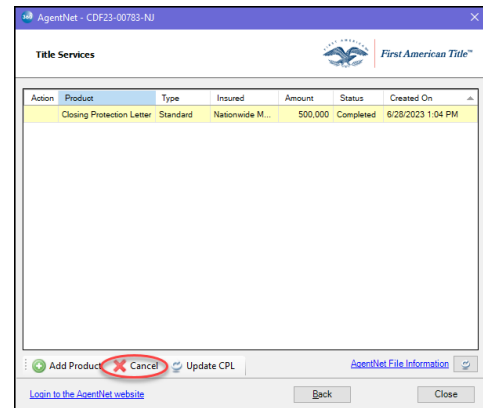


In SoftPro Standard or SoftPro Enterprise

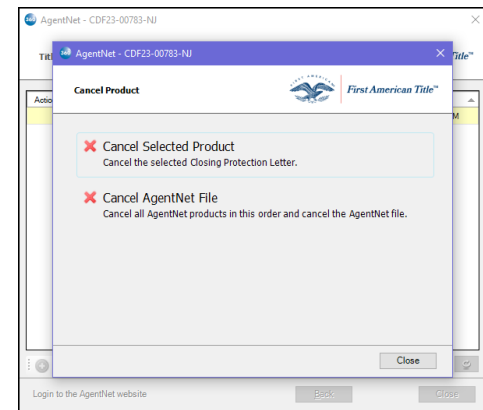


## Canceling a Closing Protection Letter

1. To update a Closing Protection Letter, click the **Cancel** icon at the bottom of the **Title Services** screen.

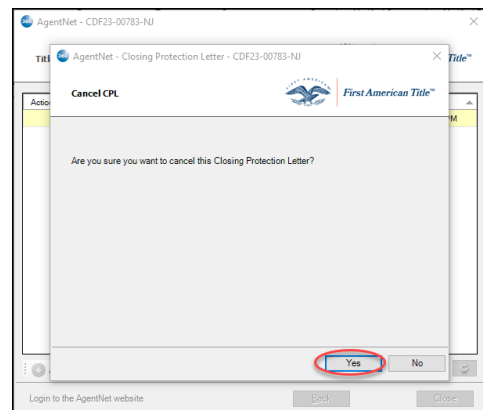


2. There is an option to only cancel the selected product or canceling the entire file. Select the option that applies.



7. A confirmation screen will populate based on the option selected.

Selecting **No** will close the window with no action taken.



Selecting **Yes** will cancel the item selected.

