

# agentTRAX User Guide

260

August, 2022

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# **Table of Contents**

History	4
Introduction	4
Accessing	4
Selecting the Company/Underwriter	6
Starter Search	8
Submitting the Initial Request	8
Automation	10
Patriot Search	11
Submitting the Initial Request	11
Automation	13
Closing Protection Letters	14
Submitting the Initial Request	14
Editing a Closing Protection Letter	17
Canceling (Voiding) a Closing Protection Letter	19
High Liability Approval Request	21
Adding Document(s)	23
Editing a Submitted Request	25
Canceling a Request	28
Creating the Policy Jacket(s)	29
Endorsements: Matched versus Unmatched	31
Reviewing the Policy Jacket(s)	34
Authorized Signatory: Printing a signature image on the Jacket	35
Submitting Final Policy Documents	36
Adding Document(s)	37

## History

Date	Version	Details
August, 2022		Added instructions for Patriot Search, Updated instructions for High Liability Approval.
March, 2022		Added instructions for printing the Authorized Signatory image on the policy jacket.
October, 2021		Original release

## Introduction

The agentTRAX application allows you to order Closing Protection Letters, Policy Jackets, perform Patriot searches, perform Starter searches, obtain High Liability Approvals while in your SoftPro order. The application pulls information from your SoftPro order into agentTRAX eliminating duplicate entry.

## Accessing

From the **360 Services** menu, double-click **FNTG – agentTRAX** located under the **Underwriter Services** folder.



- 1. Select the Services tab
- 2. Click the Underwriter Services folder to expand
- 3. Double-click **Underwriter Services**
- 4. From the Order Linking window
  - a. If no order is open, enter the corresponding order in the **Selected Order Number** field

Order Linking
Open Order Numbers:
Selected Order Number:
Enter order number here
OK Cancel

b. If a single order is open and not active, the order number is shown in the Open Order Numbers field and the Selected Order Number field

Order Linking	
Oran Order Numbers	
ETPA19.05193	
Order number is automatically populated as Selected Order Number	)
Selected Order Number:	
FTPA19-05193	
OK Cancel	

NOTE: The **Selected Order Number** field can be overwritten with an order that is not open.

- c. If multiple orders are open and no orders are active, all order numbers appear in the Open Order Numbers field and the first order is displayed in the Selected Order Number field. Highlight an order in the Open Order Numbers field to select the applicable order
- 5. Press the **OK** button to continue

**NOTE**: If an order is active, the order is automatically linked and these screens are bypassed.

Order Linking	
Open Order Numbers: FTPA19-05193 FTPA19-05194	
First order number is automatically populated as Selected Order Number	)
Selected Order Number:	
OK Cancel	

# Selecting the Company/Underwriter

The Company/Underwriter Selection window opens showing **companies that are available** and identifies if the Company/Underwriter **can issue a CPL and/or Policy Jacket** for the **Property State** entered in your SoftPro order.

The default setting is to group the Companies alphabetically by those that can.

- issue the Jacket and the CPL
- only issue the CPL
- only issue the Jacket

ompany/Underwrit	er Selection			IENTTRAX
lease select the comp Company	any and underwriter	ter that you would like to use: Address	JacketAccess	CPLAccess
Foley & Lardner, LLP	CTIC	111 N Orange Ave Ste 1800	1	~
Foley & Lardner, LLP	CTIC	100 N Tampa St Suite 2700	1	1
Foley & Lardner, LLP	CTIC	111 N Orange Ave Suite 18	1	1
Foley & Lardner, LLP	CTIC	2 S Biscayne Blvd Ste 1900	1	1
Foley & Lardner, LLP	FNTIC	1 Independent Dr Ste 1300	1	1
Foley & Lardner, LLP	FNTIC	111 N Orange Ave Suite 18	1	1
Foley & Lardner, LLP	FNTIC	111 N Orange Ave Ste 1800	4	1
Foley & Lardner, LLP	FNTIC	100 N Tampa St Ste 2700	1	1
Foley & Lardner, LLP	CLTIC	1 Independent Dr Ste 1300	1	1
Hill, Ward & Hende	FNTIC	101 E Kennedy Blvd Ste 37	1	4
Integrity Title, Inc.	FNTLW	1356 N Federal Hwy	1	4
Vacation Title Serv	CTITT	9002 San Marco Ct Bldg 10	1	× )
Foley & Lardner, LLP	CLTIC	100 N Tampa St Ste 2700	×	<ul> <li></li> <li></li> </ul>
Adams and Reese LLI	CLTIC	150 2nd Ave N Ste 1700	1	X

NOTE: The columns can be sorted in ascending or descending order by single clicking on any of the column headers (i.e., **Company** or **Underwriter**).

- a. Click the column headers to sort
- b. Click the **Refresh Data** button to return to the original view

	Please select the company and under	writer that you	would like to use:		
(	Company A	Underwriter	Address	JacketAccess	CPLAccess
	Adams and Reese LLP	CLTIC	150 2nd Ave N Ste 1700	<ul> <li>Image: A set of the set of the</li></ul>	<b>~</b>
~	Adams and Reese LLR	ENTIC	101 F Kennedy Blvd Ste 40	- Joner	
~	Hill, Ward & Nendon of, PA	mentile_	T⊳=-rkennedy Blvd Ste 37		
(	Refresh Data		[	Next	Close

- 6. Highlight the applicable entry.
- 7. Click the **Next** button

entrivax - FTPA19-05194					
ompany/Underwriter Selec	tion			NTTRA) cu On Track & On Time	
ease select the company and	underwriter that you	would like to use:	JacketAccess	CPLAccess	
Adams and Reese LLP	CLTIC	150 2nd Ave N Ste 1700		V	T
Adams and Reese LLP	FNTIC	101 E Kennedy Blvd Ste 40	1	1	1
Adams and Reese LLP	CTIC	101 E Kennedy Blvd Ste 40	1	1	
Foley & Lardner, LLP	CTIC	111 N Orange Ave Ste 1800	1	1	
Foley & Lardner, LLP	CTIC	100 N Tampa St Suite 2700	1	-	D
Foley & Lardner, LLP	CTIC	111 N Orange Ave Suite 18	1	~	1

- Agent Name to be shown, check the applicable radio button. This screen will only appear if the issuing agent has a DBA defined.
- 9. Click the **Next** button



From the Title Services window,

10. Click the **Add Product** button to open the **Available Products** window

Title Services	
Action Product Type Recipient Insured	Amount Status Created
Add Product	
	Back Next Clos
	Keeping You On Track & O
Starter Search Perform Starter Search	Patriot Search Perform Patriot Search
High Liability Approval Request A High Liability Approval is required on this file.	Closing Protection Letter Create a new CPL
	Doligy Image Upload

11. Click a Product link to continue

Follow the steps in the corresponding section

- Starter Search <u>click here</u>
- Patriot Search <u>click here</u>
- Closing Protection Letter <u>click here</u>
- High Liability Approval Request <u>click here</u>

- Jacket <u>click here</u>
- Policy Image Upload <u>click here</u>

## **Starter Search**

#### **Submitting the Initial Request**

1. Click the Starter Search link



- 2. From the **Starter Search Parameters** window, select at least one parameter in order to enable the **Search** button.
  - a) **County** dropdown is editable as necessary.
  - b) Once the parameter is selected, the Value can be edited only when you Include the Field.
  - c) **Street Type** is an editable dropdown ensuring the proper value is used in the search.
  - d) Document Type can be changes to restrict the search results to Owner, Loan or Other document types.
  - e) Document Category can be edited to Policy, Preliminary Reports or Commitments.

MentTRA	AX Starter Search - 09152021 arch Parameters		× AGENTTRAX Keeping You On Track & On Time
County I	Miami-Dade	~	0 fields selected
(*) Suppor	rts wildcard search		
Please se	elect at least one of the follow	ving attributes to start search:	
Include	Field	Value	^
	Street Number *	3116	
	Street Name *	West 72nd	
	Street Type	ST	~
	City *	Miami Lakes	
	Zip	33018	
	Subdivision/Condo Name	Terrace View	
	Date From(mm/dd/yyyy)		
	Date To(mm/dd/yyyy)		
	Property ID Number (APN)	Parcel#1	
	Map Book		
	Map Page		×
Documen	t Type All v [	Occument Category All	✓ Match Full Text ✓
			Search Cancel

- f) Match field can be adjusted to Full Text and Exact Match.
- g) Click the **Search** button to initiate the search.

		Prope	rty ID Number (/	(PN)	Parcel#1					Τ
		Map B	look							
		Map P	age							~
D	ocumen <sup>4</sup>	t Type	All	~	Document Category	All	~	Match	Full Text	~

If no results are found, you will have the opportunity to change your search parameters

Include	Field	Value		
	Street Number *	3116		
	Street Nam SoftPr	o 360	×	
	Street Type		~	
	City *			_
	Zip 🗸	No results found. Please update your sear	ch parameters.	
	Subdivision			
	Date From			
	Date To(mr		OK	
	Dranash ID Mumb	as (ADN) Descelled		-

- 4. If results are found the **Starter Search Results** screen is displayed giving you the opportunity to review the results before ordering documents.
  - Each column is sortable ascending or descending by clicking on the column header.
  - b) Search Again to modify your search parameters to repeat the process.
  - c) Or select up to 5 items to **Order Documents** for the results.
  - d) Click **Order Documents** view documents for the selections

🥺 Age	ntTRAX Starter Sear	ch - 0915202						
Starte	er Search Result	5				You On Tra	CRAX ck & On Time	$\langle$
View	Address	Policy Type	Category	Policy Number	Subdivision	Lot/Unit	Effective Date	î
	861 NE 72ND TER	LOAN	Commitment	NULL	NEW BELLE MEADE	27	3/15/2000	
	1679 W 72ND ST	OWNERS	Commitment	NULL	FLAMINGO LAKE	62	10/15/2004	
	910 NE 72ND TER	LOAN	Commitment	NULL	NEW BELLE MEADE	12	7/25/2003	
	1674 W 72ND ST	LOAN	Commitment	NULL	LAKE ROYALL EAST - ADDITION 2	114	11/9/2002	
	3535 W 72ND ST	OTHER	Commitment	NULL	BEAR - SECTION 3	20	2/14/2005	
	1494 W 72ND ST	OTHER	Commitment	NULL	LAKE ORLEANS	16	2/7/2005	
	910 NE 72ND TER	LOAN	Commitment		NEW BELLE MEADE	12	4/25/2003	~
1 Docu	ment Selected (5 ma	x)				430	results return	ned
				Search Again	Order Docume	ents	Cancel	

- 5. The **Review Starter Search** screen will allow you to view or copy the document before you Accept or Reject the results.
  - a) The **File Name** indicates the policy type and property address
  - b) Check the individual check box for the corresponding documents or the All check box to accept all document(s)

From the Review window you can,

- Click the **View** icon to view the Starter Document on screen
- Click the **Copy** icon; this copies the document to the clipboard

3	🗟 Revi	ew Star	er Sear	ch - 09152021			×
5	🐔 Sele	ctAll 🗏	ele:	ct None			
	🗊 Do	cument	s				
[	$\checkmark$	View	Сору	File Name	File Size (KB)	Transferred	
	$\square$	J.		LOAN_861 NE 72ND TER	84	100%	
l							
				O Acce	ot 🥥 Reject	Cancel	

NOTE: A copy of the document is also saved to the Order **Attachments** screen.

c) Clicking the Cancel button or closing this window by clicking the X will return you to the Title Services screen where you will have the opportunity to Edit/View and return back to the Review Starter Search screen

3	agent	TRAX - 0915202	21					×
	Title	Services						INTERNET AND A CONTRACT AND A CONTRA
	Action	Product	Туре	Recipient	Insured	Amount	Status	Created
1	۲.	Starter Search					Ready	10/15/2021 4:25 P
	<							>
_	🛈 Add	Product 🥖	Edit / View	🖉 Get HLA S	itatus			Ű
						Back	Next	Close

#### Automation

The Starter Search product comes with Submit and Accept Automation allowing the user to set up custom triggers to automatically perform a Starter Search. The automated search will perform a search of an **exact** match of the property address. If no results are found, the search will fail displaying the appropriate error message. The user will then need to manually perform the search adjusting the search parameters for that transaction.

Perform a 360 Action		×
<b>2</b> ↓ □		
✓ General		
Service	FNF - Starter Search	
Service Action	Submit order	
<ul> <li>Service Action Settings</li> </ul>		
Agent ID	44444.1.22.56	
General		
	ОК	Cancel

## **Patriot Search**

## Submitting the Initial Request

1. Click the Patriot Search link



- 2. From the **Patriot Search Select Contacts** window, select at least one contact in order to enable the **Search** button.
  - a. Contact list contains all Buyers and Sellers in the order and they are all checked by default. If a search is not needed on a specific Buyer or Seller, uncheck the associated box.
  - **b.** Click the **Search** button to initiate the search.

Soft	Pro - 2022070065		×
Patrio	ot Search Select (	Contacts	Reeping You On Track & On Time
Prope	erty Address : 1	865 Selva Marina Drive, Atlantic Be	ach, FL, 32233
Selec	t at least one Cor	ntact :	
	Code	First Name	Last Name/Organization
	В	Amelia	Franklin
	в	Wilbur	Alred
$\checkmark$	S	Jane	Anderson
$\checkmark$	S	Bill	Anderson
$\checkmark$	S		Seller Company
			Search Cancel

- The Review Patriot Search screen will allow you to view or copy the documents before you Accept or Reject the results.
  - a. The **File Name** indicates the contact type; Individual Buyer or Seller and Entity Buyer or Seller.
  - b. The word MATCH will be part of the File Name if a match was found. The word NOMATCH will be part of the File Name if there were no match found.

From the Review window you can,

- Click the View <sup>Mail</sup> icon to view the Search results document on screen
- Click the Copy icon to place a copy of the document in the clipboard
- Accept or Reject the documents. If you Accept the documents, a copy will be saved in the Order Attachments.
  - c. Clicking Accept, Reject, or Cancel button or closing this window by clicking the X will return you to the Title Services screen where you will have the opportunity to submit another search. If you accepted the documents and one had a match, an exclamation point will appear in the Action column alerting the user of the match.

🂩 agent	TRAX - 202208	0091				-=\(	× CNITTDAV
Title	Services						Ding You On Track & On Time
Action	Product	Туре	Recipient	Insured	Amount	Status	Created
1	Patriot Search					Completed	8/10/2022 11:28 AI
<							>
🕢 Add	Product	'Edit /View	Get HLAS	Status			ల్ల
					Back	Next	Close

d. Additionally, if a match was found, an indicator will appear in the SoftPro 360 transaction queue.

1	Queue					
	📀 Next Ste	ep 🔘 🖂 🗐	Views:	Active Orde	r 👻	🚖 🛃 🗟 📸
		Provider	Servi	ce	Description	Status
	< ?	FNF	Patrio	tSearch	МАТСН	Completed

#### Page 12 | 37

#### March, 2022

	View	Copy	File Name	File Size (KB)	Transferred
7	A		IndBuver 2021030002 22-02-806-33-34 NOMATCH.pdf	107	100%
2	A		IndSeller_2021030002_22-02-806-33-34 MATCH.pdf	107	100%

#### Automation

The Patriot Search product comes with Submit and Accept Automation allowing the user to set up custom triggers to automatically obtain a Patriot Search report of Buyers and Sellers in the order. Even though there are multiple ways to alert that a Match was found, some users may prefer to create a task in the order to indicate an additional alert. Here are a couple of ways to accomplish that.

- Trigger based on Description in the SoftPro 360 queue.
  - a. Set up two Accept Automation processes based on the value in the Description column. One would look for the word "MATCH" in the description, the other would look for "NOMATCH".
- 2. Use a code snippet to interrogate the report names (as shown in item 3 above) looking for MATCH or NOMATCH. Contact the SoftPro Implementation Team for assistance in creating the code snippet.

New Automation Process	?	×
General Other		
Category:	~	·
Name:		
Description:	< >	
Last Modified On: (none)		
Last Modified By: (none)		
Rule:	Edit	
When a <u>FNF - PatriotSearch</u> 360 transaction is updated and 360 transaction status is <u>'Ready'</u> and 360 transaction description contains <u>'MATCH'</u> then do the following: perform a <u>FNF - PatriotSearch</u> 360 action and perform <u>specific</u> actions on the order add a <u>Patriot Search</u> task		
Enable this process		
OK Cancel	Ap	ply

# **Closing Protection Letters**

#### Submitting the Initial Request

- 1. Click the **Closing Protection Letter** link
- 2. From the **Letter Selection** window, verify or select the,
  - **Type** the type of Letter available is determined by the state of the Agent's ID; the default is Standard CPL
  - b. Covered the available parties (Lender, Buyer and Seller) are determined by the Type of Letter
    - If Type = Agent in Good Standing the available party is Lender
    - If Type = Standard Letter, the available parties are Lender, Buyer and/or Seller (depending upon the type of transaction)
  - c. If your order has more than one loan, select the loan



🧀 agentTRAX CPL - FTPA19-05194	×
Letter Selection	REEPING YOU ON FLOCK & ON TIME
Type Standard CPL	
Lender Loan 1	
Attorney <not supported=""> Settlement Agent:</not>	

NOTE: **Attorney** – shows **<Not supported>** based on your agentTRAX profile settings; reach out to your Sales Representative or the agentTRAX helpdesk if you need access to the approved attorney list

d. Settlement Agent (optional)- click the <Click here to add a Settlement Agent> link

3. Select an approved Settlement Agent

HINT: Use the **Filter** field if you know the name or part of the name of the Settlement Agent to quickly locate the entry. The list filters as you type.

- 4. Verify **Details** to confirm your selection is correct
- 5. Click the **OK** button

🥹 agentTRAX CPL - FTPA19-05194	x
Settlement Agent	Keephg You On Track & On Time
Filter Woodward	
Woodward, Pires & Lombardo, P.A. Woodward, Pires & Lombardo, P.A.	
Details Woodward, Pires Lombardo, P.A. 606 Bald Eagle Dr Ste 500 Marco Island, FL 34145	
	OK Cancel

Letter Selection		Keeping You On Track & On T
Туре	Standard CPL	
Covered	☐ Buyer 17 Lender Loan 1	
Attorney	<not supported=""></not>	
Settlement Agent:	Woodward, Pires & Lombardo, P.A.	

The **Settlement Agent** shows your selection on the **Letter Selection** window.

6. Click the **Next** button

- 7. From the **CPL Information** window,
  - a. Verify the information shown; the information is pulled from your SoftPro order but may be changed if needed

NOTE: Any information changed here does not write back to your SoftPro order.

- b. Lender Clause, select from the drop-down, if needed
- c. Click Submit

CPL Information	
File Number	FTPA19-05194
Buyer/Borrower Name	John Smith
Lender Name	First Ever Savings and Loan
Lender Clause	
Lender Attention	
Lender Address 1	4800 Dream Home Place
Lender Address 2	
Lender Zip Code	27609
Lender City	Raleigh
Lender State	NC
Loan Number	
Property Additional Data	
Property Street Address	100 W. Laurel St., Ste 103
n · ~	r

Once the request is submitted, the **Review Closing Protection Letter(s)** window is shown listing the requested CPL(s).

 Check the individual check box for the corresponding CPL or the All check box to accept all CPL(s)

From the **Review** window you can,

- Click the **View** icon to view the CPL on screen
- Click the **Copy** icon; this copies the CPL to the clipboard

NOTE: When **Accept** is clicked, a copy of the document is saved to the order's **Attachments**.

9. Click the Accept button

The **Title Services** window shows the **Status** updated to **Completed** and a copy of the document is saved to the order **Attachments** screen.

	•	
🧀 agentTRAX CPL - FTPA19-05194		×
Review Closing Protection Letter(s)	-AG Keepir	ENTTRAX 19 You On Track & On Time
Documents		
View Copy File Name	File Size	Transferred
Standard CPL_FL_Lender_f17d8bd4-0959	77483	100%
	Accept	Close

	🥹 agent	TRAX - FTPA	19-05193					×
atus	Title	Services					AGEN	ITTRAX
е 🛛	Anting	Deadurat	Tures	Desision	Income		Status	
nents	Action	CPL	Standard	Lender	Bank of Ameri	Amount	Completed	9/23/2019 9:25 AM
Attack	nments							
+ - 6 6 .	2 🚨 🖶	é la 🚰						
Attachments		Name A Stan	dard CPL_FL_Le	nder_af769642-6	ža-4e)			
\\FTPA19-05193\Atta	achments\			_				

## **Editing a Closing Protection Letter**

From the Title Services window you can edit an active (not canceled) Closing Protection Letter.

 With the applicable order open, access the Title Services window; refer to Steps 1-9 (here) if needed

The Title Services window shows all agentTRAX activity for the corresponding order.

- 2. Highlight the applicable CPL
- 3. Click the Edit/View button

💩 agent	TRAX - FTPA	19-05193					>	<
Title	Services						GENTTRAX eeping You On Track & On Time	
Action	Product	Туре	Recipient	Insured	Amount	Status	Created	٦
(	CPL	Standard	Lender	Bank of Ameri		Completed	9/23/2019 9:25 AM	1
								1
1								
🕞 Add	Product	Edit / View	🖉 Get HL	A Status			<u>ي</u>	
				[	Back	Next	Close	

The **CPL Summary** window shows data from the original Closing Protection Letter.

4. Click the Edit button

PL Summary	E Keeping You On Track & Or
Document ID	35801015
Status	Active
etter Type	CPL
Drder	FTPA19-05193
Recipient	Lender
nsured Name	Bank of America, NA
nsured Address	120 W. Laurel St., Ste 103 Tampa Hillsboro
State	FL
County	Hillsborough
Date	9/23/2019
Inderwriter	CTIC
ile Number	FTPA19-05193

NOTE: The **Document History** button allows you to view when and who created or modified the document. 5. Enter new data as needed

NOTE: Changes made here do **not** write back to your order.

6. Click the Submit button

agentTRAX CPL - FTI	→¬¬¬¬¬¬¬¬¬¬¬¬¬¬¬¬¬¬¬¬¬¬¬¬¬¬¬¬¬¬¬¬¬¬¬¬
CPL Information	
File Number	FTPA19-05193
Buyer/Borrower Name	Allen Jones
Lender Name	Bank of America, NA
Lender Clause	
Lender Attention	
Lender Address 1	9000 Southside Blvd.
Lender Address 2	
Lender Zip Code	32256
Lender City	Jacksonville
Lender State	FL
Loan Number	
Property Additional Da	ta
Property Street Addres	s 120 W. Laurel St., Ste 103
	(
Title Services	
Title Services	Recipient Insured Amount Status Created
Title Services	Recipient Insured Amount Status Created
Title Services	Recipient Insured Amount Status Created Lender Bank of Ameri Ready 9/23/2019 9:25 AM tTRAX CPL - FTPA19-05193
Title Services	
Title Services	Recipient Insured Amount Status Created L. Lender Bank of Ameri Ready 9/23/2019 9:25 AM ETRAX CPL - FTPA19-05193 Rew Closing Protection Letter(s) Interview Closing Protection Letter(s)
Title Services	Recipient Insured Amount Status Created     Lender Bank of Ameri Ready 9/23/2019 9:25 AM      tTRAX CPL - FTPA19-05193     tew Closing Protection Letter(s)     tew Closing Protection Letter(s)
Title Services	Recipient       Insured       Amount       Status       Created          Lender       Bank of Ameri       Ready       9/23/2019       9:25 AM         ItTRAX CPL - FTPA19-05193       Iteration       Status       Stat
Title Services	Recipient       Insured       Amount       Status       Created          Lender       Bank of Ameri       Ready       9/23/2019 9:25 AM         ItrAX CPL - FTPA19-05193       Iteration       Iteration       Iteration         iew Closing Protection Letter(s)       Iteration       Iteration       Iteration         uments       Vew       Copy       File Name       File Size       Transferred         Image: Standard CPL_FL_Lender_af769642-62fa       77550       100%
Title Services	Recipient       Insured       Amount       Status       Created          Lender       Bank of Ameri       Ready       9/23/2019 9:25 AM         tTRAX CPL - FTPA19-05193       P         kew Closing Protection Letter(s)       Status       Created         uments       File Name       File Size       Transferred         Image: Standard CPL_FL_Lender_af769642-62fa       77550       100%
Title Services	Recipient       Insured       Amount       Status       Created          Lender       Bank of Ameri       Ready       9/23/2019 9:25 AM         tTRAX CPL - FTPA19-05193       P         iew Closing Protection Letter(s)       P       P         uments       View       Copy       File Name       File Size       Transferred         View       Copy       File Name       File Size       Transferred         Image: Standard CPL_FL_Lender_af 769642-62/a       77550       100%
Title Services	Recipient       Insured       Amount       Status       Created          Lender       Bank of Ameri       Ready       9/23/2019 9:25 AM         tTRAX CPL - FTPA19-05193       P         iew Closing Protection Letter(s)       P       P         uments       View       Copy       File Name       File Size       Transferred         View       Copy       File Name       File Size       Transferred         Image: Standard CPL_FL_Lender_af 769642-62fa       77550       100%
Title Services	Recipient       Insured       Amount       Status       Created          Lender       Bank of Ameri       Ready       9/23/2019       9:25 AM         tTRAX CPL - FTPA19-05193       Image: Cosing Protection Letter(s)       Image: Cosing Protection Letter(s)       Image: Cosing Protection Letter(s)         uments       Image: Copy       File Name       File Size       Transferred
Title Services	Recipient       Insured       Amount       Status       Created          Lender       Bank of Ameri       Ready       9/23/2019       9:25 AM         tTRAX CPL - FTPA19-05193       Image: Cosing Protection Letter(s)       Image: Cosing Protection Letter(s)       Image: Cosing Protection Letter(s)         uments       Image: Copy       File Name       File Size       Transferred         Image: Standard CPL_FL_Lender_af769642-62fa       77550       100%
Title Services	Recipient       Insured       Amount       Status       Created          Lender       Bank of Ameri       Ready       9/23/2019       9:25 AM         ITRAX CPL - FTPA19-05193       Image: Cosing Protection Letter(s)       Image: Cosing Protection Letter(s)       Image: Cosing Protection Letter(s)         Itements       Image: Cosing Protection CPL_FL_Lender_af769642-62fa       Transferred         Image: Cosing Color CPL_FL_Lender_af769642-62fa       77550       100%
Title Services	Recipient       Insured       Amount       Status       Created          Lender       Bank of Ameri       Ready       9/23/2019       9:25 AM         tTRAX CPL - FTPA19-05193       Image: Comparison of Compari
Title Services	Recipient       Insured       Amount       Status       Created          Lender       Bank of Ameri       Ready       9/23/2019 9:25 AM         ITRAX CPL - FTPA19-05193       Image: Comparison of Comparis

- 7. Click the **Action** icon
- 8. From the **Review** window, if multiple CPLs, check the corresponding check box for the edited CPL
- 9. Click the Accept button

The **Title Services** window shows the **Status** as **Completed**.

10. Click the **Close** button

🥯 ag	gent	TRAX - FTPA	19-05193						X
т	Title :	Services					Keep	ENTTR ving You On Track & C	AX In Time
_									
Ac	tion	Product	Туре	Recipient	Insured	Amount	Status	Created	
		CPL	Standard	Lender	Bank of Ameri		Completed	9/23/2019 9:2	25 AM
	<u></u>			~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~		~~~~			· · ·
$\bigcirc$	Add	Product	Edit / View	🥒 Get HLA	Status				õ
						Back	Next		ose

## **Canceling (Voiding) a Closing Protection Letter**

 With the applicable order open, access the Title Services window; refer to Steps 1-9 (<u>here</u>) if needed

The Title Services window shows all agentTRAX activity for the corresponding order.

- 2. Highlight the applicable CPL
- 3. Click the **Edit/View** button

IMPORTANT: Once canceled, a CPL
cannot be reinstated. You must
create a new CPL if needed.

🥺 agentTRAX - FTP	A19-05193						x
Title Services						DENTTRA	K
Arrian Destant	T	Desision	Lineard	0	C	Control	_
CPL	Standard	Lender	Bank of Ameri	Amount	Completed	9/23/2019 9:25 A	M
and a series	~~~		-			n an an h	1
1		~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	- march	$\sim$	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~~~	Ĩ
Add Product	🖊 Edit / View	🖉 Get HL	A Status			3	ల్ల
			1	Back	Next	Close	

4. From the **CPL Summary** window, click the **Void** button

Document ID	35801015
Status	Active
Letter Type	CPL
Order	FTPA19-05193
Recipient	Lender
Insured Name	Bank of America, NA
Insured Address	120 W. Laurel St., Ste 103 Tampa Hillsboro
State	FL
County	Hillsborough
Date	9/23/2019
Underwriter	CTIC
File Number	FTPA19-05193
Document History	Void Edit Clos
Cancel Letter	

5. When prompted click **Yes** to confirm cancellation

The **Title Services** window shows the **Status** as **Canceled**.

6. Click the **Close** button

March, 2022

## High Liability Approval Request

With agentTRAX, you can create and submit, edit, or cancel a High Liability Approval Request with information pulled from your order.

1. Access the Title Services window; refer to Steps 1-9 (here) if needed

From the Title Services window,

 Click the Add Product button to open the Available Products window.

Title Services						Keeping You On Track & (
Action Product	Туре	Recipient	Insured	Amount	Status	Created
				~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~		v
		-0				
Add Product	/ Edit / View	🖉 Get HL	A Status			
				Back	Nex	d Clo
) agentTRAX - 20 Available Produ	22080091 ucts					GENTTR
agentTRAX - 20 Available Produ	22080091 ucts Search			Patri	Dt Search	GENTTR phg You On Track & C
agentTRAX - 20 Available Produ	22080091 ucts Search tarter Searc	ch		Patrie Perfor	ot Search m Patriot Sea	CENTTR phg You On Trock & ( arch
agentTRAX - 20 Available Produ Starter S Perform Si High Lia A High Lia this file.	22080091 ucts Search tarter Searc bility Appro	ch Iproval Rei Ival is require	quest ed on	Patri Perfor	ot Search m Patriot Sea ng Protect a new CPL	SENTTR phg You On Track & C arch tion Letter

 Click the High Liability Approval Request link. The indication that the request is required is based on comparing the policy amounts with the issuing agent's contract liability.

- 4. The **High Liability Approval Request** window pulls the following information from your SoftPro order. Verify (or select) the,
  - a. Address shows the first property address from your order
  - b. **County**, if blank, select from dropdown; change if needed
  - c. **Property Type**, if blank, select from drop-down; change if needed
  - d. Requested Underwriter, if blank, select from drop-down; change if needed
  - e. Estimated Closing Date; change if needed

NOTE: If changes are made in fields populated with information from your SoftPro order, the new information does **NOt** write back to your order.

High Liability Approval Request	Keeping You O	n Track & On Tin
Address: 1515 SW Archer Road Gainesville FL 32601		
County:	Alachua	$\sim$
Property Type	1-4 Family Residential (in	cludir $\sim$
Requested UnderWriter	Rick Rivas	$\sim$
Estimated Closing Date	08/22/2022	
Does this transaction involve construction?	No ~	
Has construction commenced?	No ~	
Is mechanic's lien coverage requested?	Select V 🛠	
Brief description of transaction and improvement	S	

- f. Does this transaction involve construction defaults to,
  - i. Yes = Construction option is selected in SoftPro order
  - ii. No = Construction option is not selected in SoftPro order
- g. Has construction commenced defaults to,
  - i. Yes = Construction option is selected in SoftPro order
  - ii. No = Construction option is not selected in SoftPro order
- h. Is mechanical lien coverage requested = select from drop-down; this is a required field as indicated by the red asterisk
- i. **Brief description of transaction and improvements** = optional, enter as needed. This information will appear in the request submitted to AgentTRAX.
- 5. Click the **Next** button

- 6. From the High Liability Approval Order Information window, verify or select the,
  - a. **Contact** = defaults to the user logged into **360**; change if needed
  - b. First Name, Last Name, Phone Number, Email Address = enter corresponding information (these are required fields)
  - c. Policy grid
    - i. **Policy Type** pulls from your SoftPro order
    - ii. Liability Amount pulls from your SoftPro order
    - iii. Gross Premium = manually enter
    - iv. Net Premium = manually enter
  - d. **Premium Details** = optional, enter as needed
- 7. Click the Next button

🧀 agentTrax HLA - FTPA19-05193	×
High Liability Approval Order Informatio	
Contact: Susan Rivera-Stoll	<b></b>
First Name: Susan	Last Name: Rivera-Stoll
Phone Number: (717) 209-1320	Email Address: susan.rivera-stoll@softproi
Policy Type Liability Amou Loan 142550 Data from your order	nt Gross Premium Net Premium 0.00 Manually enter Premiums
	Back Next Cancel

### Adding Document(s)

8. Select a document(s) to submit with your request

If from your local drive

- a. Click the **Browse** button; this opens the **File Explorer** window
- b. Navigate to the folder containing the document(s) to be submitted
- c. Double-click the document you wish to submit

NOTE: High Liability Approval requests require at least one document be submitted with the request.

Add Document(s)		
lease add documents associate	ed with request	
Name		

#### If from your Attachment folder in SoftPro

- a. Click the **Attachment** button; this opens the list of attachments in your SoftPro order
- b. Double-click the document you wish to submit

	300 agentTrax HLA - 20190800034-TEST		×
F	Add Document(s)	EAGENTTRAX Keeping You On Track & On Time	
	Please add documents associated with request		
	Name		
	Attached Documents	Browse	
Ple	ease select a document attached to the order.	Attachment	
	Type Description		

9. If needed, use the

**Rename** button to enter a new document name

**Delete** button to remove the attachment

10. Click the **Submit** button when all documents are ready to send.



11. Once submitted, the Title Services window shows the Status as InProgress until the HLA is Approved. As soon as the user receives an approval notification from agentTRAX, the Status on the Title Services window and will be automatically updated to Ready and the Get HLA Status button will be disabled.

💩 agent	TRAX - 2022	2080083				-3		× FDAV
Title	Services					- 3	AUCINI Keeping You On Tra	ck & On Time
Action	Product	Type	Recipient	Insured	Amount	Status	Created	
ß	HLA					Ready	8/4/2022 8	50 AM
<				_				>
O Add	Product	🖋 Edit / View	Get HL	A Status				ల్ల
					Back	Nex	ti (	Close

For requests created before 09/14/2022, when you receive an approval notification, the **Title Services** screen remains as **InProgress**,

- 1. Highlight the corresponding request
- 2. Click the **Get HLA Status** button to refresh the status

🥶 agentTRAX - FTP	A19-05193					×
Title Services					1k	
Action Product	Туре	Recipient	Insured	Amount	Status	Created
HLA					merogress	5/23/2018 4:30 PM
						NTTRAX
•						
O Add Product	/ Edit / View	Get HL	A Status			ý
				Back	Next	Close

#### **Editing a Submitted Request**

A submitted HLA request can be edited once submitted. If the **Status** shows as **Completed**, editing the request will change the status to **InProgress** and will require re-approval.

From the Title Services window,

- 1. Highlight the request you wish to edit
- 2. Click the Edit/View button

36	agent	rrax - 2019	0800034-TEST	ſ					×
	Title	Services					_ = 10		Y
[	Action	Product	Туре	Recipient	Insured	Amount	E Keepi	ing You On Track & On Time	
	$\square$	HLA					InProgress	8/9/2019 4:11 PM	
	•		4						2
l	🕑 Add	Product	Edit / View	Get HLA	A Status			9	2

The **High Liability Approval** window shows the details of your original request.

- 3. Click the Edit button
- 4. A dialog box will appear to confirm the edit request. Click **OK** to confirm you wish to edit
- 5. Make the necessary edits on the applicable window; the original request information is shown
  - a) High Liability Approval Request window
    - i. Overwrite original information as needed
    - ii. Click **Next** once edits are entered or if no edits are needed on this screen

🚧 agentTrax HLA - 20190800034-TEST	×
High Liability Approval	
Address: 5621 East Side Avenue Austin, FL 73301 County: Broward Property Type: 1-4 Family Residential (including Timeshares Estimated Closing Date: 08/30/2019 Does this transaction involve construction? No Has construction commenced? No Is mechanical lien coverage requested? Yes Agent Number: 6781.3.72.09	3)
Void	Edit Cancel

#### b) High Liability Approval Order Information window

- i. Overwrite original information as needed
- ii. Click Next once edits are entered or if no edits are needed on this screen
- c) Add Document(s); you are not required to add additional documents
  - i. Add a document(s) repeat steps in Adding Document(s) section, if needed
- 6. Click the Submit button

💀 agentTrax HLA - 2	0190800034-TES	г		×	<		
High Liability A	pproval Order		You On	TRAX			
		🔊 agentTrax HLA - 201908000	34-TEST				×
Contact:	Melissa Taylor				-3/		U V V D'
First Name:	Melissa	High Liability Approval	Reques	t		ILINII	KAX
Phone Number:	(919) 555-555				E Keep	ping You On Trac	ck & On Time 🔪
Policy Type	L	Addre	SS:	5621 East Side Ave Austin, FL 73301	enue		
Loan		Count	v:	Broward		~	
Owner		Prope	rtv Tvpe <sup>.</sup>	1-4 Family Reside	ntial (includir	10' ×	
Premium Detail	<u>8</u>	Estimated Closing Date Does this transaction invol Has construction commen Is mechanical lien coverag Brief description of transa	lve const iced? ge reque ction and	ruction? [ sted? [ limprovements	08/30/2019 No No Yes	· · · · · · · · · · · · · · · · · · ·	×
					C	Next	Cancel

			Keepin	g You On Track & On Time
Name	associated with re	equest		
				Browse
				Attachment
				Rename
				Delete

## **Canceling a Request**

From the Title Services window,

- 1. Highlight the request you wish to cancel
- 2. Click the Edit/View button



The **High Liability Approval** window shows the details of your original request.

- 3. Click the Void button
- 4. Click **OK** to confirm you wish to void (cancel) the request

agentTrax HLA - 20190800034-TEST	×
High Liability Approval	Excepting You On Track & On Time
Address: 5621 East Side Avenue Austin, FL 73301 County: Broward Property Type: 1-4 Family Residential (including Timeshares) Estimated Closing Date: 08/30/2019 Does this transaction involve construction? No Has construction commenced? No Is mechanical lien coverage requested? Yes Agent Number: 6781.3.72.09	
Void	Edit Cancel

The **Void** (cancel) request is submitted to agentTRAX and the **Status** is updated to show **Canceled**.



#### Automation

The HLA product comes with Accept Automation allowing the user to automatically accept the Approval document into the order.

## **Creating the Policy Jacket(s)**

1. Access the **Title Services** window; refer to **Steps 1-9** (here) if needed

From the Title Services window,

- 2. Click the **Add Product** button to open the **Available Products** window.
- agentTRAX FTPA19-05194

   Title Services

   Action Product Type Recipient Insured Amount Status Created

   Add Product Edit / View Get HLA Status

   Back Next Close

3. Click the **Jacket** link



- Address:
  County:
  Property Type:
  Effective Date:
  10/14/2019
- 4. From the **Property Information** window, verify or select the,
  - a) Address
  - b) County
  - c) Property Type
  - d) Effective Date

- 5. Check the radio button for the Jacket to be issued
- 6. If a Lender policy and multiple loans, select the corresponding loan from the drop-down
- 7. Check the Proforma check box if applicable
- 8. Click the Next button



- 9. From the **Loan Jacket Rate Selection** window, highlight the applicable rate
- 10. Click the Next button

Jackelinan -	FTPA19-03194	X
Loan Jacket	Rate Selection	
Filter:		
BASIC LO	AN	2nd Loan Policy Rate
BASIC LOP	AN	Loan Policy rate
BASIC LOA	AN	Timeshare Premium FL
BASIC LOA	AN	Res Ltd Cov Mtge Mod Pol
REFINANCE	E LOAN	FNAS Title Production, Decision Engine
REISSUE 1	LOAN	Reissue Loan Rate - Non-Refinance
REISSUE 1	LOAN	Reissue Loan-Refinance
SIMULTAN	LOAN LOAN	FL Simo Rate
SUBSTITUT	TION LOAN	Substitution 3-4yrs-40%
SUBSTITUT	TION LOAN	Substitution 4-5 yrs-50%
SUBSTITUT	TION LOAN	Substitution 5-10 yrs-60%
SUBSTITUT	TION LOAN	Substitution less than 3yrs-30%

- 11. From the Loan Jacket Form Selection window, select the applicable Jacket Form
- 12. Click the Next button



#### 13. Verify the Loan Jacket Information

🥺 ja	cketTRAX - FTPA	19-05194	×
L	.oan Jacket Info	AGENTTRAX Keeping You On Track & On Time	
I	BASIC LOAN - AL	TA Loan Policy 06_307_FL - Loan Policy rate	
[	Name	Value	
	Policy Effective Date	10/14/2019	
	Policy Amount	1,010,000.00	
	Gross Premium	275.00	
	Authorized Signatory		
	Notes	Enter notes here	

## **Endorsements: Matched versus Unmatched**

The **Owners or Loan Endorsements Included with Policy** window shows matched and/or unmatched endorsements depending upon your selection.

Display All - shows a complete list of	🧀 jacketTRAX - FTPA19-05194	×
endorsements sent from AgentTRAX (matched and unmatched)	Loan Endorsements Included with Policy	GENTTRAX
Display Selected - shows only those endorsements that match the endorsements selected in your ProForm order	BASIC LOAN - ALTA Loan Policy 06_307_FL - Loan Policy rate	
<ul> <li>Matched endorsements are shown with a checked check box</li> </ul>	Code     Name     Gros     Gros     T1269R     2006_ALTA 2 Truth in Lending_Residential     11296R     2006_ALTA 4.1 Condominium with FL Modificatio      11200R     2006_ALTA 5.1 Planaed Litit Development with	25.00 25.00
<ul> <li>Display Unselected – shows endorsements selected in your order but unmatched to an AgentTRAX endorsement</li> </ul>	Code Name Charable Rate 25.00	25.00 × Match
NOTE: You cannot proceed until all <b>Unmatched Endorsements</b> are matched as noted by the <b>red asterisk</b> .	Back Next	Cancel

#### Unmatched Endorsements

If endorsements are shown in the **Unmatched Endorsements** grid, a red asterisk 📩 is shown indicating an action is required. You **MUSt** manually select (or match) each entry to an AgentTRAX endorsement to continue.

Page 31 | 37

×

- 1. Highlight an endorsement in the **Unmatched Endorsements** grid
- 2. Click the Match button

BASIC LOAN -	ALTA Loan Policy 06, 307, EL - Loan Policy rate	Dieplay All	-
Selected End	orsements	Dispidy Air	-
Code	Name	Gross Premium	
✓ 11269R	2006_ALTA 2 Truth in Lending_Residential	25.00	
T 11296R	2006_ALTA 4.1 Condominium with FL Modificatio	. 25.00	_
T 11300R	2006_ALTA 5.1 Planned Unit Development with	25.00	
T 11202P	2006 ALTA EVaiable Rate Mostagae Residentia	25.00	-
Unmatched E	ndorsements	Mat	ich
Code	Name	Charge	
ALTA 6-06	ALTA 6-06 - Variable Rate	25.00	
	Back	ext: Can	cel
+TRAX - FTP2	Back N4	ext Can	cel
tTRAX - FTP <i>I</i>	Back N4		cel
tTRAX - FTPA Match Endor	Back N4	ext Can	cel TR/
tTRAX - FTP <i>P</i> Match Endor	Back N4 A19-05194 sement	ext Can Can EAGENT Keeping You On Tirk	cel
tTRAX - FTPA Match Endor	Back N4 A19-05194 sement Endorsement - ALTA 6-06 (FL) ALTA 6-06 - Varia	ext Can	cel TR/
tTRAX - FTPA Match Endor Proform Order gentTrax Endo	Back N4 A19-05194 sement Endorsement - ALTA 6-06 (FL) ALTA 6-06 - Varia orsements :	ext Can EAGENT Keeping You On Tro ble Rate	cel TR/

drop-down, select the corresponding endorsement4. Click the **OK** button

3. From the agentTRAX Endorsements

- 5. Repeat **Steps 1-4** until all unmatched endorsements are matched

Once no endorsements are shown in the **Unmatched Endorsements** grid, the **Next** button becomes active.

🥺 jacketTRAX - FTPA19-05194

6. Click Next to continue

oar	n Endorse	ments Included with Policy		AGENTTRA Keeping You On Track & On Tin
BAS		ALTA Loan Policy 06_307_FL - Loan Policy rate		Display Selected 💌
Sel	ected End	lorsements		
	Code	Name		Gross Premium
5	11269R	2006_ALTA 2 Truth in Lending_Residential		25.00
2	11302R	2006_ALTA 6 Variable Rate Mortgage_Resider	ntial	25.00
2	11315R	2006_ALTA 8.1 Environmental Protection Lien	with F	25.00
Jnn	natched E	indorsements	_	Match
Co	de	Name	Cha	arge

Page 32 | 37

- 7. If **Other Fees** are applicable, check the corresponding check box
- 8. Click the Next button



- 9. Enter (or verify) **Optional Information** as needed
- 10. Click the **Submit** button

Optional Information		E Keeping Yo	u On Trock & On Time
Check Amount	_		
Check Number:	_		
	_		
Policy Gross Premium \$ 275.00	_		
Endorsement Gross Premium \$ 175.00	_		
Other Fees Gross Premium \$ 03.28	_		
Total Gross Amount: \$ 353.28			

## **Reviewing the Policy Jacket(s)**

The Review window displays,

- **Groups** lists of all Jackets requested
- **Data** shows specific information to the highlighted Jacket
  - Name = policy type
  - Current Value = SoftPro order number
  - New Value = agentTRAX number

Click the **Edit** icon to modify the **New** 

Value as needed.

	🥺 Review - FTPA	19-0519	4		×
	🛃 Select All 📑	Select N	one 🛛 🛄 Field Codes	5	
n	Groups	💿 Da	ta		
	All	◄	Name	Current Value	New Value
	····· Loan Policy		Loan Policy	FTPA19-05194	7230709-215234854 📝
					1
Edit New	Value : Loan Policy				×
+ Appe	end 🛛 🌱 Revert 🛛 🏪 U	Ippercase	Aa Pro	opercase   🗮 Trim   🗎	Copy   🐰 Cut   🖺 Paste
7230709-3	215234854				

- Documents shows the Policy Jacket(s) issued
  - View allows you to view the document on screen
  - Copy places a copy of the document on your Clipboard allowing you to paste it to another program
- 11. Click the **Accept** button

💀 Review - FTPA	419-05194				×
🛃 Select All 🖹	Select None   📕 Field Code	25			
Groups	📀 Data				
All	Name Name	Current Value	New V	alue	
I Loan Policy	✓ Loan Policy	FTPA19-05194	723070	9-215234854	1
Documents					
View C	Copy File Name		File Size	Transferred	
	LoanPolicy-4854.pdf		434574	100%	
		Accept	🔵 Rej	ect Clos	e

The document is processed, and the **Title Services** window shows the **Status** as **Completed**.

12. Click the **Close** button

agent	TRAX - FTP	A19-05194						×
Title	Services						GENT eping You On Tra	CK & On Time
Action	Product	Туре	Recipient	Insured	Amount	Status	Created	
	Jacket	Loan		First Ever Sa	1,010,000	Completed	10/14/201	19 10:24 A
	CPL	Standard	Lender	First Ever Sa		Completed	9/20/2019	2:29 PM
Add	Product	.✓ Edit / View	Get HL	A Status				<u>ن</u>

## Authorized Signatory: Printing a signature image on the Jacket

**Pre-requisite**: The user must have an image loaded in the AgentTRAX Preferences screen for this function to work

### **AGENTTRAX PREFERENCES**

Use the form and options below to modify your user preferences. Most are only defaults and may be overridden when necessary.

AUTHORIZED SIGNATORY							
Authorized signatory	+ Add	🛞 Delete All					
Name	Upload Signature	Signature Image	Delete Signature	Delete Entry	Associate Signature	Copy Signature	Preview Signature
(	Add Image	No		x	Ľ	Ľ	
Fred Johnson	Add Image	Yes	۲	x	Ø	Ø	0

 Go to the Countersignature Fields section of the Policy-Schedule A page of the user's ProForm Order and enter a name in the field labeled By. This must be an exact match to the name set up in the AgentTRAX Preferences screen.

Countersignature Fields		
Company name:		
Signature image:	Browse	
	View Image	
	<u>C</u> lear Image	
By:	Fred Johnson	
Title:		

2. The name will appear in the Authorized Signatory field in the jacket information screen to print on the policy jacket.

**NOTE**: If the user has not entered a name as indicated in Step 1 above, the user can manually enter a name in this screen.



# **Submitting Final Policy Documents**

 Access the Title Services window; refer to Steps 1-9 (here) if needed

From the Title Services window,

- 2. Click the **Add Product** button to open the **Available Products** window.
- 3. Click the Policy Image Upload link

🥹 agentTRAX - FTPA	19-05194							×
Title Services							Ding You On Trac	RAX # & On Time
Action Product	Туре	Recipient	Insured		Amount	Status	Created	
		~~~~~					~~	
Add Product	/ Edit / View	🖉 Get HLA	Status					9
					Back	Next	t	Close
agentTRAX - 20 Available Prod	)22080091 ucts					Reep	SENT bing You On Tro	× TRAX xck & On Time
Starter Perform S	Search tarter Searc	h		R	Patriot Perform P	Search atriot Sea	arch	
High Lia A High Lia this file.	ability App ibility Approv	oroval Req val is required	uest d on	<u>;</u>	Closing Create a r	Protect new CPL	ion Let	ter
Jacket Create a r	new Jacket			Ţ	Policy In Upload po	mage U blicy imag	pload e to Ager	htrax
							Close	

Browse Attachment

## Adding Document(s)

- 4. Select your document(s)
- If from your local drive
  - a. Click the **Browse** button; this opens the **File Explorer** window
  - Navigate to the folder containing the document(s) to be submitted



- If from your **Attachment** folder in SoftPro
  - a. Click the **Attachment** button; this opens the list of attachments in your SoftPro order
  - b. Double-click the document you wish to submit

to cubmit	
LO SUDITIL	
🍻 agentTrax HLA - 20190800034-TEST	×
Add Document(s)	REEPING YOU ON Track & On Time
Please add documents associated with request	
	Browse

agentTrax HLA - 20190800034-TEST

Please add documents associated with request

Add Document(s)

Name

- 5. From the **Policy** drop-down, select the corresponding Policy
- 6. If needed, use the
  - Rename button to enter a new document name
  - > **Delete** button to remove the attachment
- 7. Repeat **Steps 4-6** until all Policy documents are added
- 8. Click the Submit button

Add Document(s)	
Please add documents and associate a policy Name Policy	
Name Policy	
👃 X17004851 - Policy w Hyper Loan (7230709-21523485 🚽	
Browse	
Attachment	1
Rename	٦
Delete	J