

# agentTRAX User Guide

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August, 2022

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## History

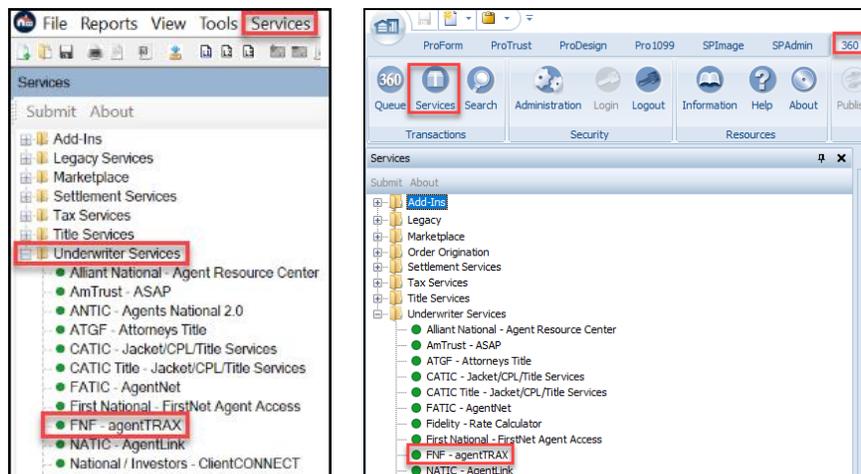
Date	Version	Details
August, 2022		Added instructions for Patriot Search, Updated instructions for High Liability Approval.
March, 2022		Added instructions for printing the Authorized Signatory image on the policy jacket.
October, 2021		Original release

## 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

The screenshot shows the 'Order Linking' dialog box. The 'Open Order Numbers' field is empty. The 'Selected Order Number' field contains the placeholder text 'Enter order number here' and is highlighted with a red circle. The 'OK' and 'Cancel' buttons are visible at the bottom.

- 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

The screenshot shows the 'Order Linking' dialog box. The 'Open Order Numbers' field contains 'FTPA19-05193'. The 'Selected Order Number' field also contains 'FTPA19-05193'. A red callout box points to the 'Selected Order Number' field with the text: 'Order number is automatically populated as Selected Order Number'. The 'OK' and 'Cancel' buttons are visible at the bottom.

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.

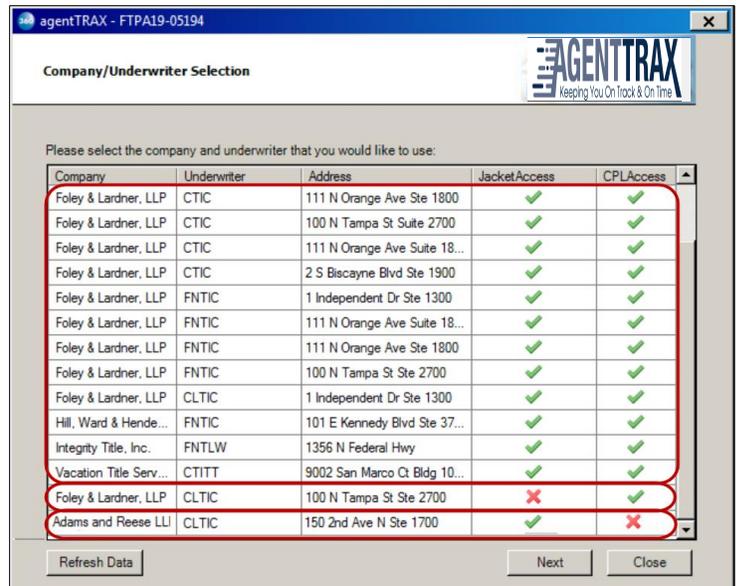
The screenshot shows the 'Order Linking' dialog box. The 'Open Order Numbers' field contains 'FTPA19-05193' and 'FTPA19-05194'. The first order, 'FTPA19-05193', is highlighted in the list. The 'Selected Order Number' field also contains 'FTPA19-05193'. A red callout box points to the 'Selected Order Number' field with the text: 'First order number is automatically populated as Selected Order Number'. The 'OK' and 'Cancel' buttons are visible at the bottom.

## 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.

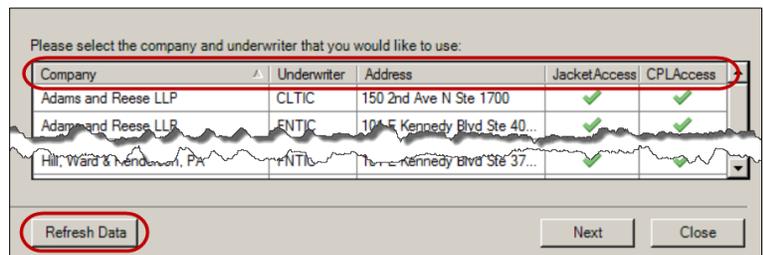
The default setting is to group the Companies alphabetically by those that can.

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

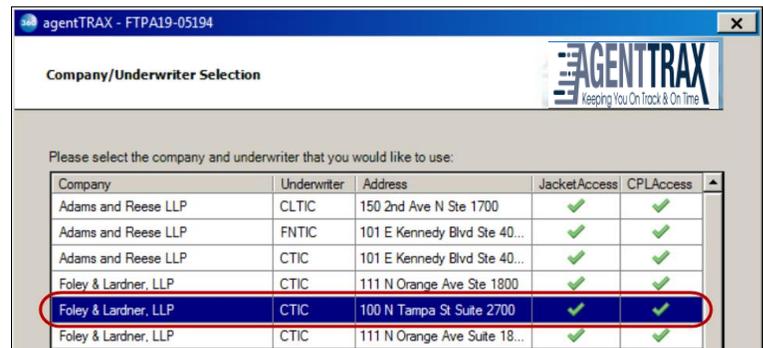


NOTE: The columns can be sorted in ascending or descending order by single clicking on any of the column headers (i.e., **Company** or **Underwriter**).

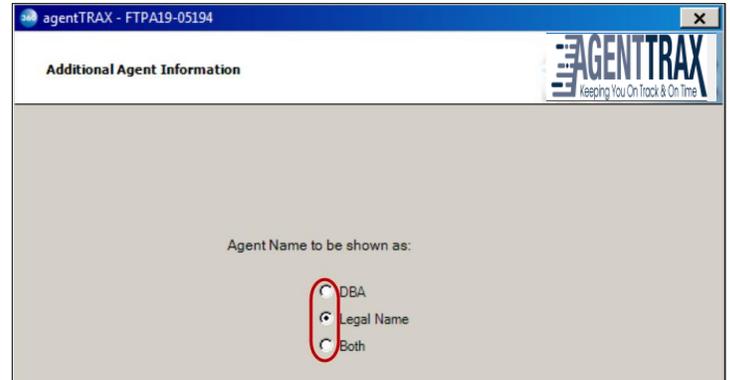
- Click the **column headers** to sort
- Click the **Refresh Data** button to return to the original view



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

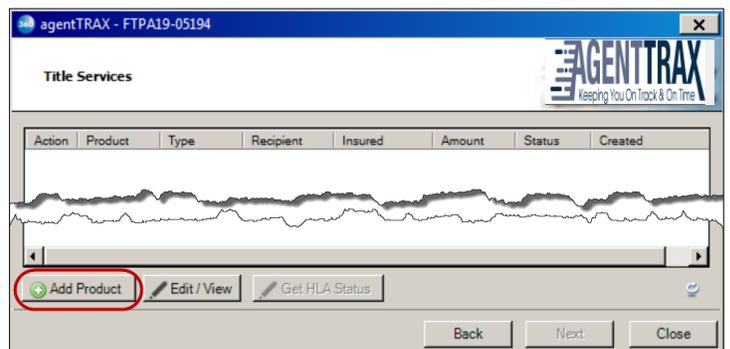


8. **Agent Name to be shown**, check the applicable **radio** button. This screen will only appear if the issuing agent has a DBA defined.
9. Click the **Next** button

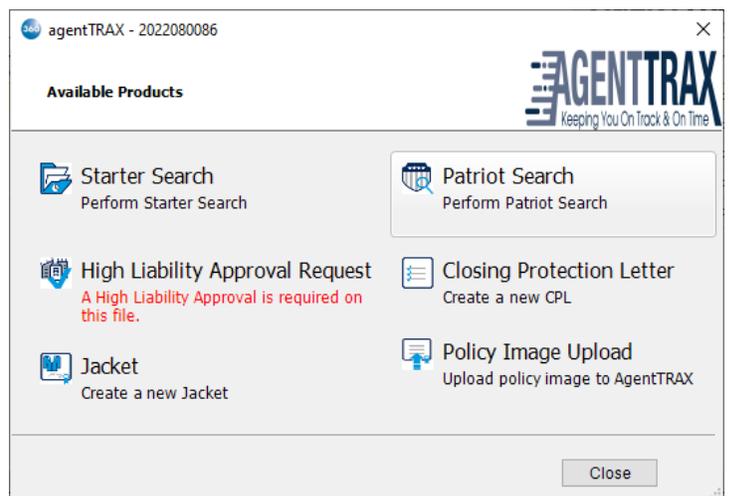


From the **Title Services** window,

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



11. Click a **Product link** to continue



Follow the steps in the corresponding section

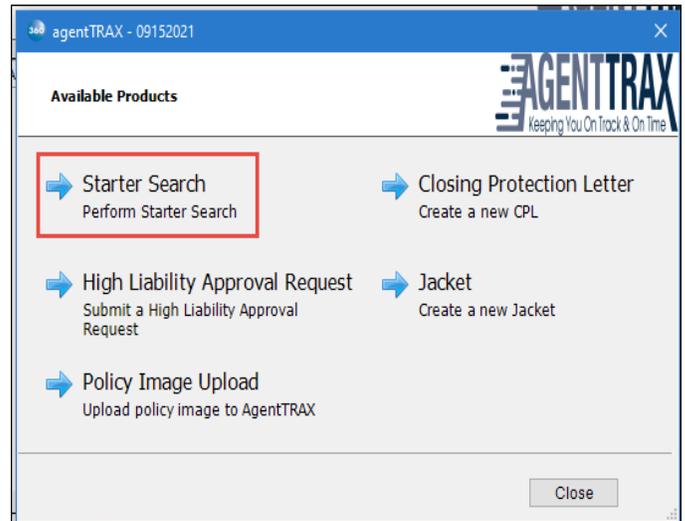
- **Starter Search** – [click here](#)
- **Patriot Search** – [click here](#)
- **Closing Protection Letter** – [click here](#)
- **High Liability Approval Request** – [click here](#)

- **Jacket** – [click here](#)
- **Policy Image Upload** – [click here](#)

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

AgentTRAX Starter Search - 09152021

Starter Search Parameters

County: Miami-Dade (0 fields selected)

(\*) Supports wildcard search  
Please select at least one of the following attributes to start search:

Include	Field	Value
<input type="checkbox"/>	Street Number *	3116
<input type="checkbox"/>	Street Name *	West 72nd
<input type="checkbox"/>	Street Type	ST
<input type="checkbox"/>	City *	Miami Lakes
<input type="checkbox"/>	Zip	33018
<input type="checkbox"/>	Subdivision/Condo Name	Terrace View
<input type="checkbox"/>	Date From(mm/dd/yyyy)	
<input type="checkbox"/>	Date To(mm/dd/yyyy)	
<input type="checkbox"/>	Property ID Number (APN)	Parcel#1
<input type="checkbox"/>	Map Book	
<input type="checkbox"/>	Map Page	

Document Type: All | Document Category: All | Match: Full Text

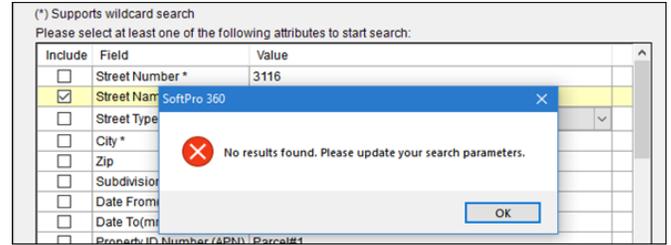
Search Cancel

<input type="checkbox"/>	Property ID Number (APN)	Parcel#1
<input type="checkbox"/>	Map Book	
<input type="checkbox"/>	Map Page	

Document Type: All | Document Category: All | Match: Full Text

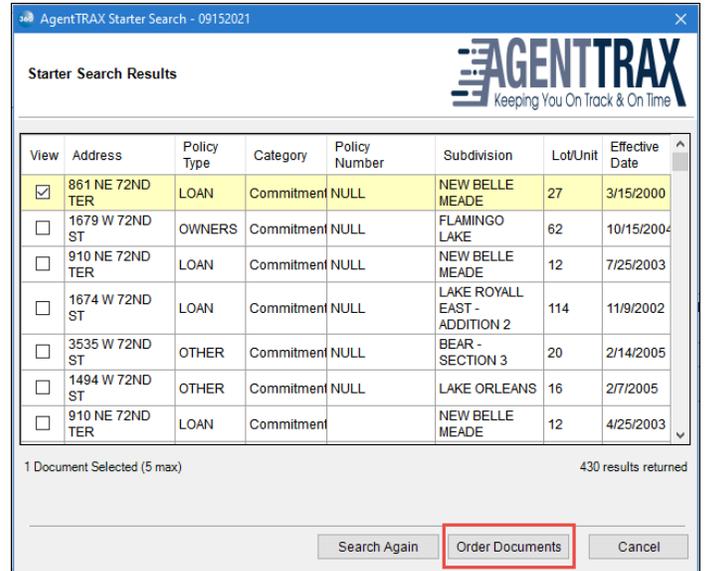
Search Cancel

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



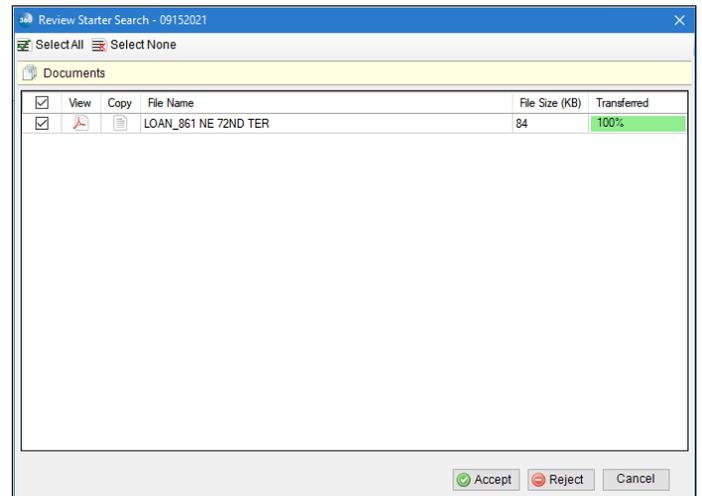
4. If results are found the **Starter Search Results** screen is displayed giving you the opportunity to review the results before ordering documents.

- a) 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



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)

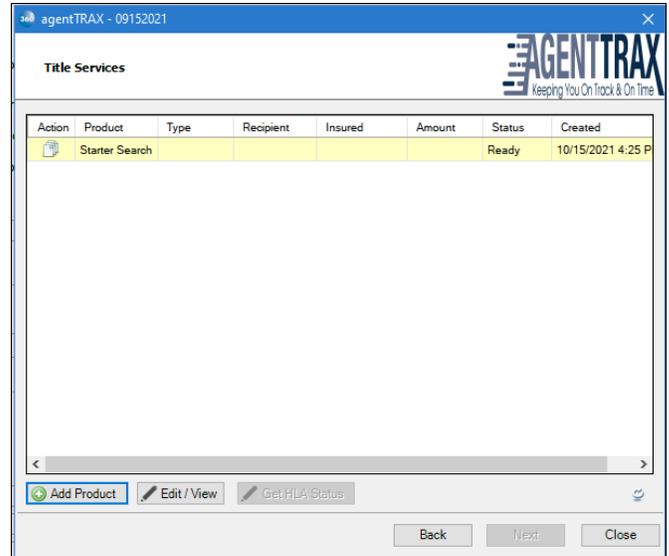


From the **Review** window you can,

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

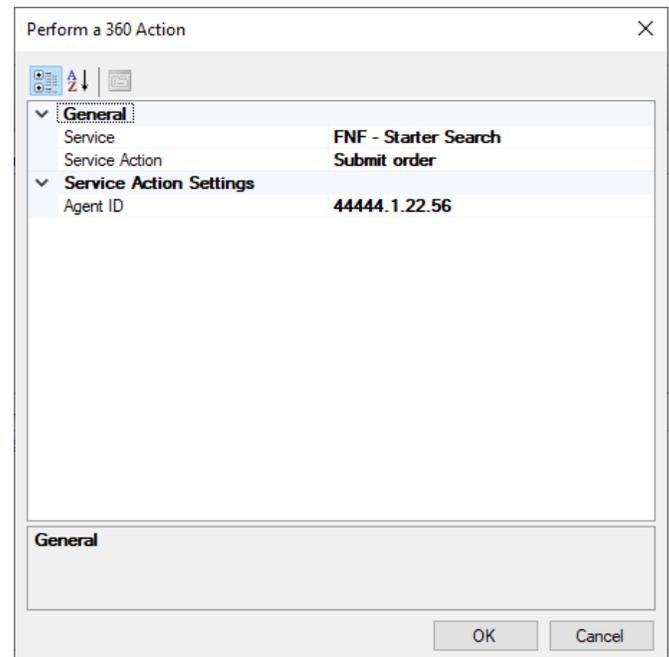
NOTE: A copy of the document is also saved to the Order **Attachments** screen.

- 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



## Automation

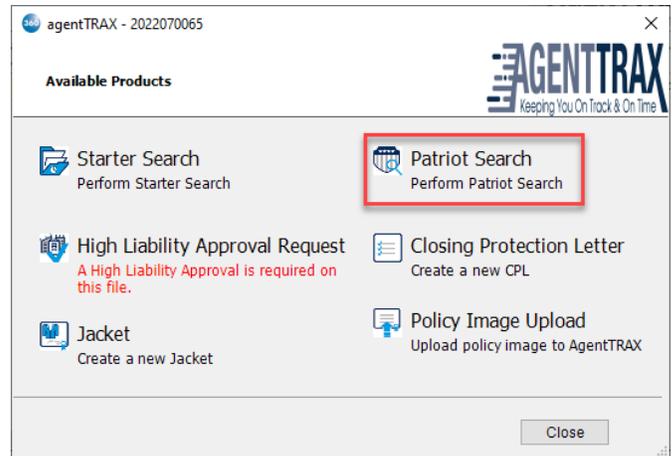
The Starter Search product comes with Submit and Accept Automation allowing the user to set up custom triggers to automatically perform a Starter Search. The automated search will perform a search of an **exact** match of the property address. If no results are found, the search will fail displaying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



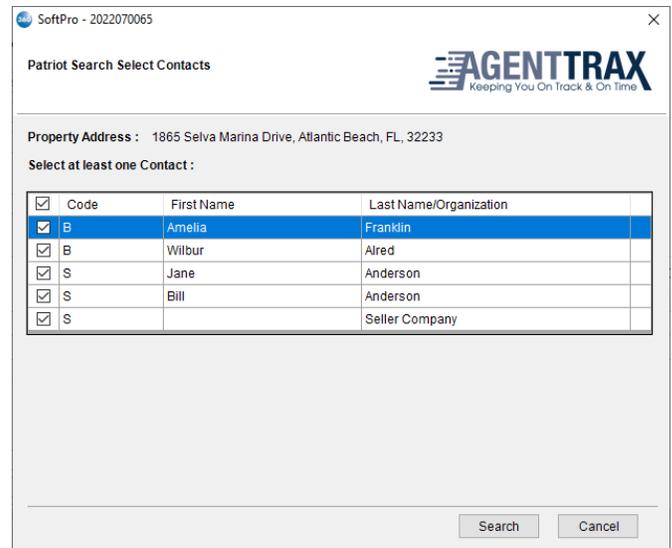
## Patriot Search

### Submitting the Initial Request

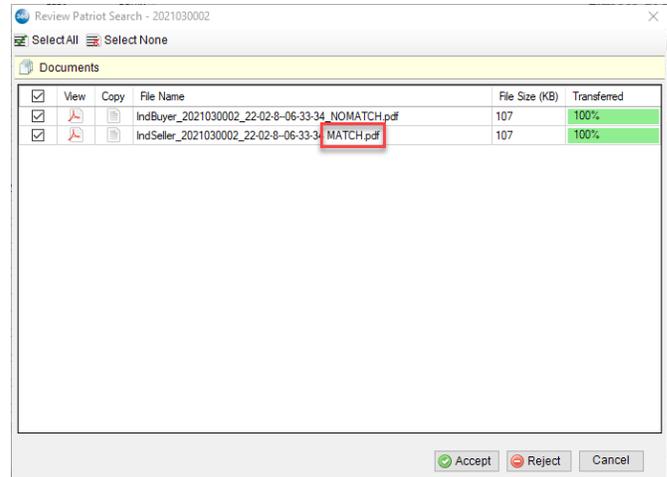
1. Click the **Patriot Search** link



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.



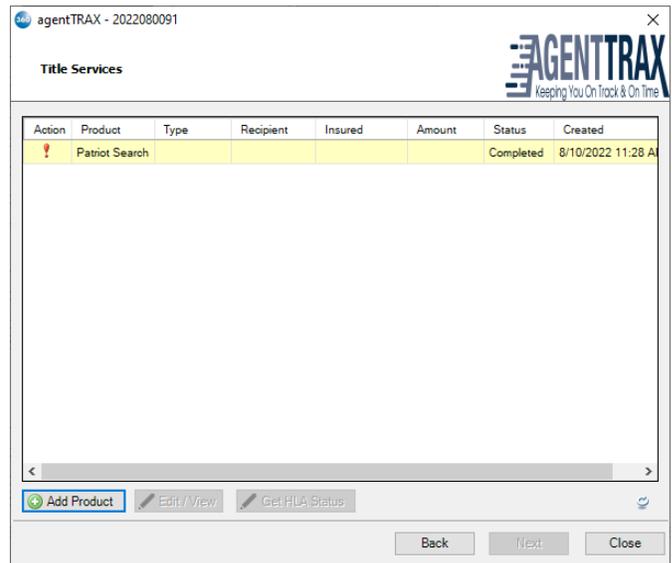
3. The **Review Patriot Search** screen will allow you to view or copy the documents before you Accept or Reject the results.
  - a. The **File Name** indicates the contact type; Individual Buyer or Seller and Entity Buyer or Seller.
  - b. The word **MATCH** will be part of the **File Name** if a match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



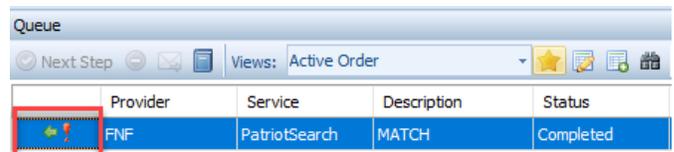
From the **Review** window you can,

- Click the **View** 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.



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



## 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.

1. 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.

The screenshot shows a 'New Automation Process' dialog box with the following details:

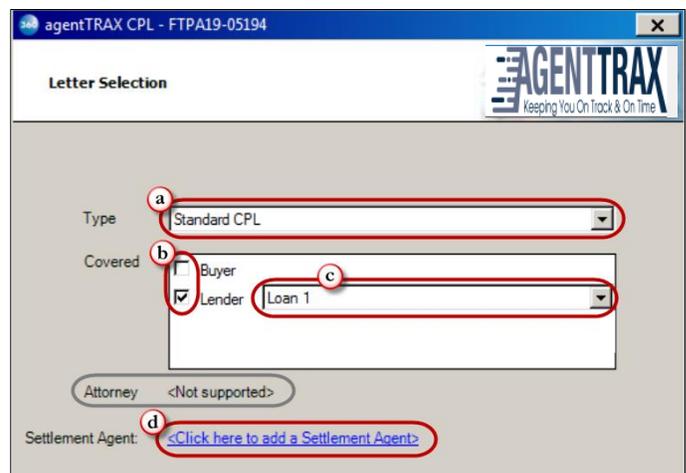
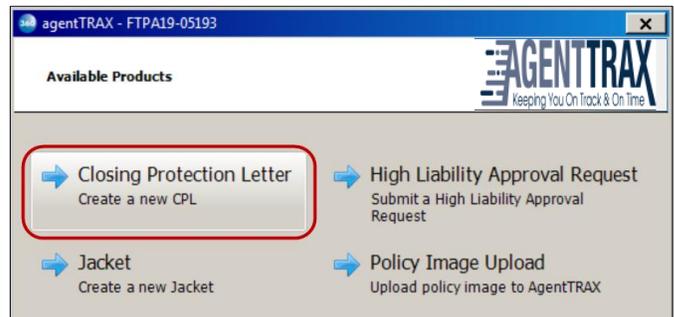
- General Tab:**
  - Category: (dropdown menu)
  - Name: (text field)
  - Description: (text field)
  - Last Modified On: (none)
  - Last Modified By: (none)
  - Rule: (text area with 'Edit' button)
- Rule Content:**

When a [FNF - Patriot Search](#) 360 transaction is updated and 360 transaction status is ['Ready'](#) and 360 transaction description contains ['MATCH'](#) then do the following:  
perform a [FNF - Patriot Search](#) 360 action and perform [specific](#) actions on the order add a [Patriot Search](#) task
- Enable this process:**
- Buttons:** OK, Cancel, Apply

## Closing Protection Letters

### Submitting the Initial Request

1. Click the **Closing Protection Letter** link
2. From the **Letter Selection** window, verify or select the,
  - a. **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



**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

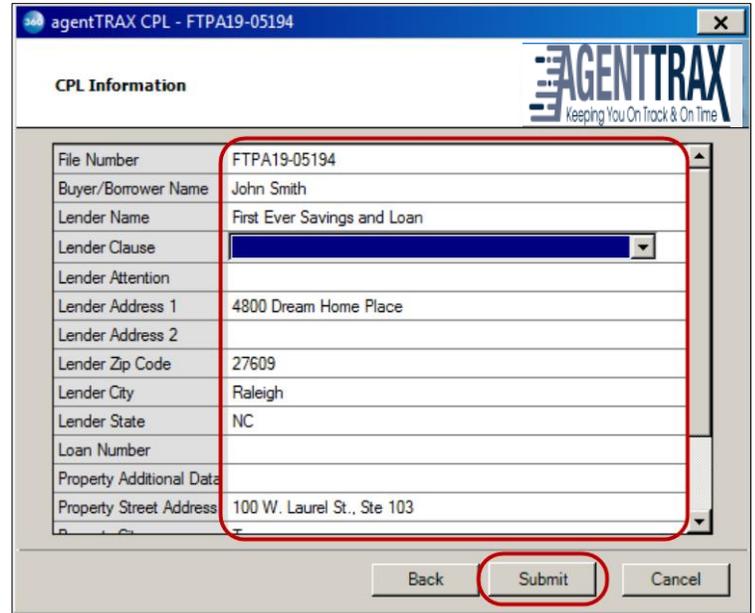
The **Settlement Agent** shows your selection on the **Letter Selection** window.

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**



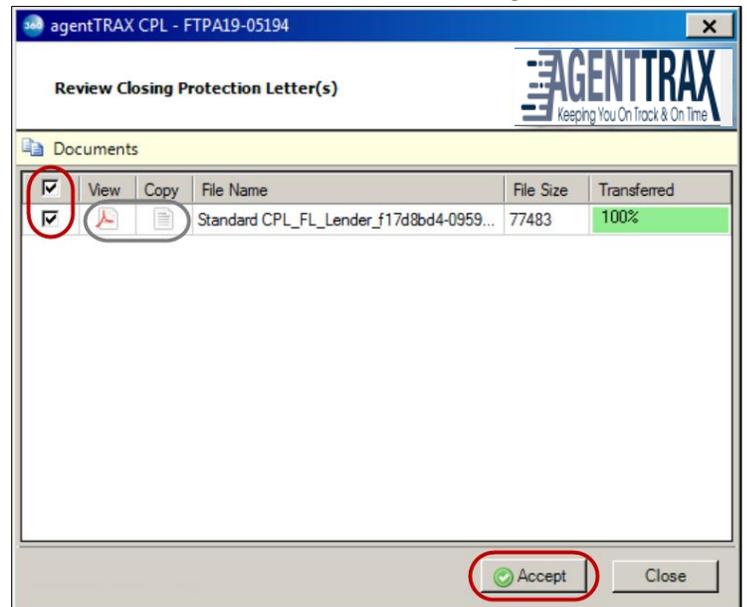
Once the request is submitted, the **Review Closing Protection Letter(s)** window is shown listing the requested CPL(s).

8. 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,

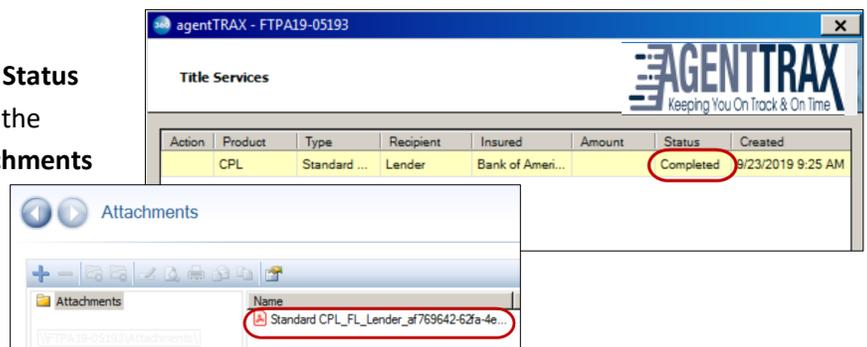
- Click the **View**  icon to view the CPL on screen
- Click the **Copy**  icon; this copies the CPL to the clipboard

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.



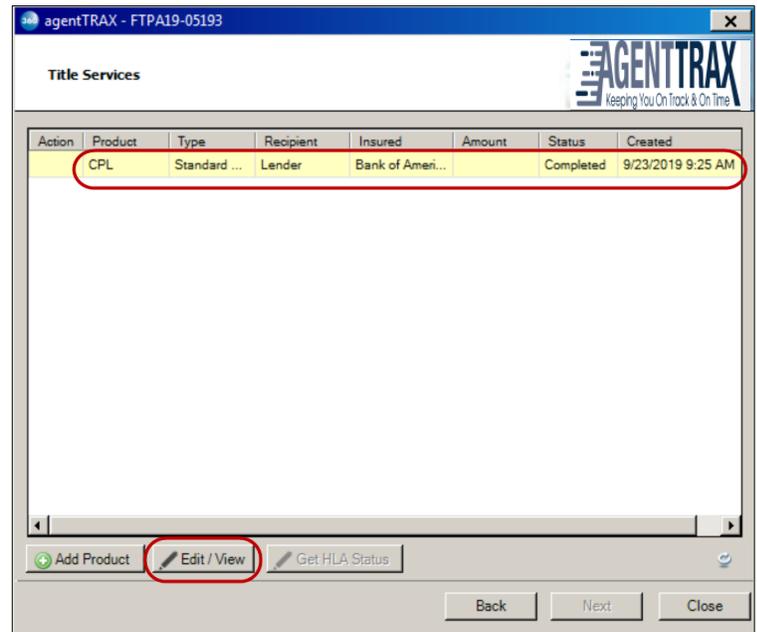
## Editing a Closing Protection Letter

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

1. 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.

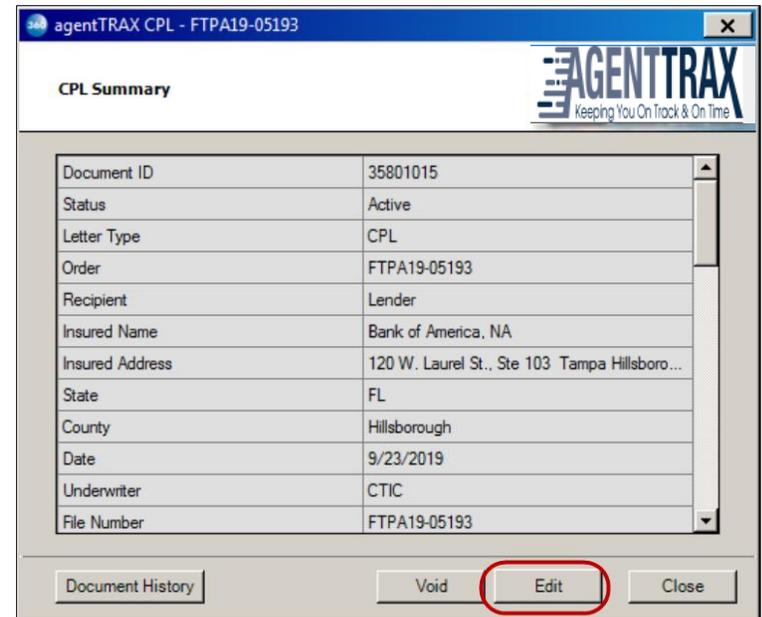
2. Highlight the applicable CPL
3. Click the **Edit/View** button



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

4. Click the **Edit** button

**NOTE:** The **Document History** button allows you to view when and who created or modified the document.

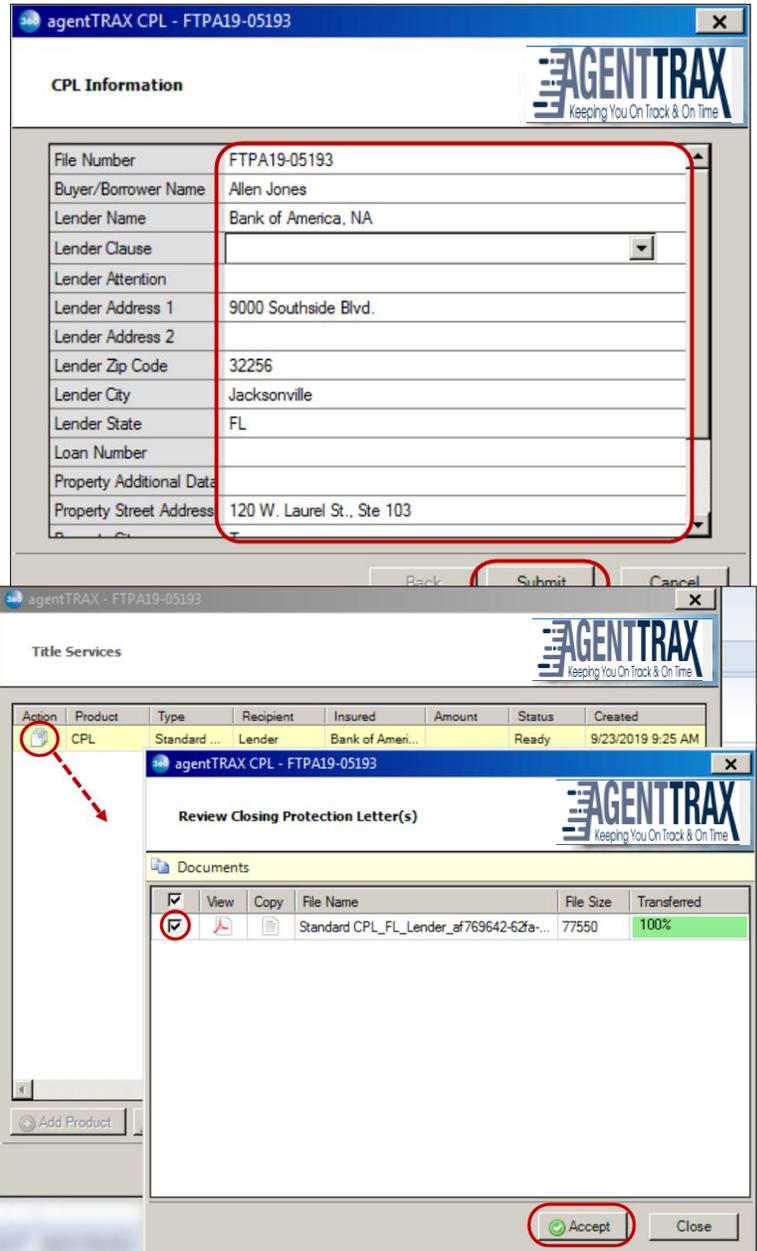


5. Enter new data as needed

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

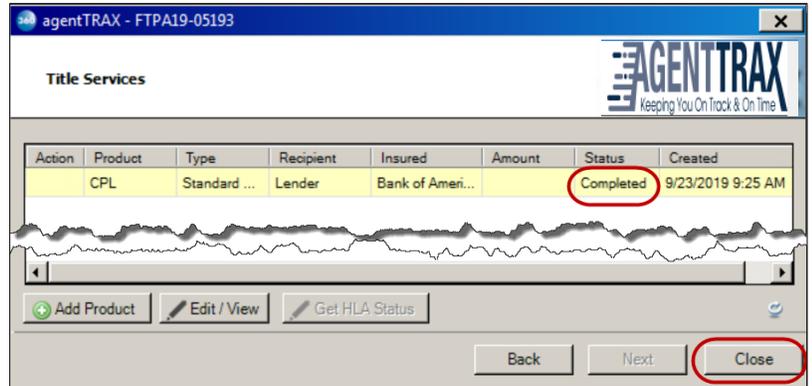
6. Click the **Submit** button

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



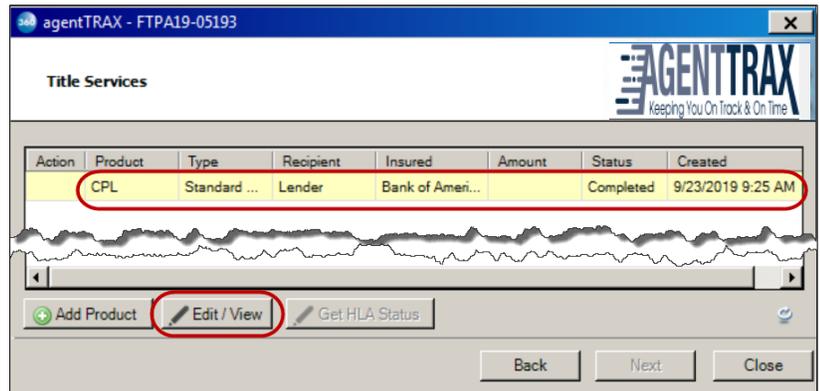
## Canceling (Voiding) a Closing Protection Letter

1. 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

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



- 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

- When prompted click **Yes** to confirm cancellation

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

- Click the **Close** button

Cancel Letter

Are you sure you want to void the CPL?

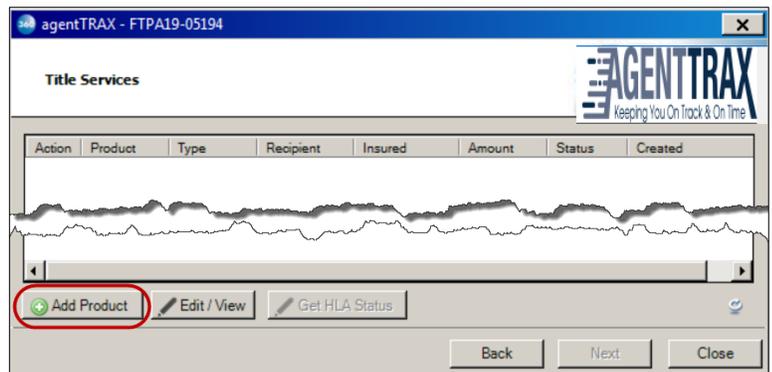
## High Liability Approval Request

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

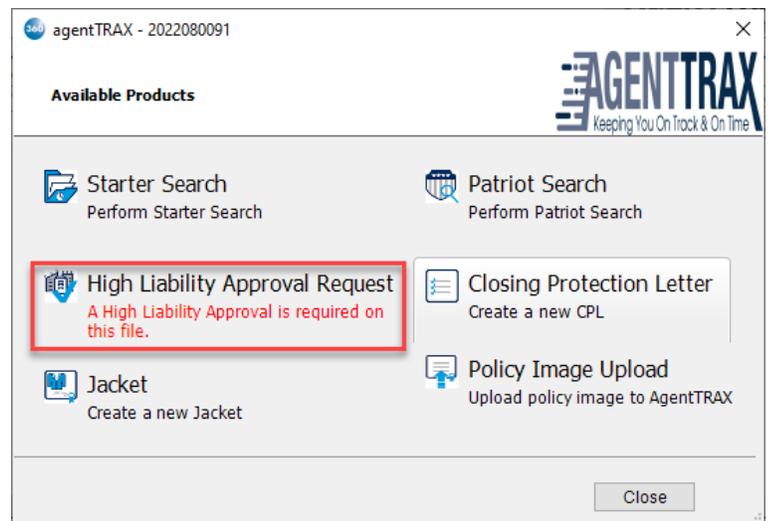
1. Access the **Title Services** window; refer to **Steps 1-9** ([here](#)) if needed

From the Title Services window,

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



3. 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 drop-down; 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.

- 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

Policy Type	Liability Amount	Gross Premium	Net Premium
Loan	1425500.00		

7. Click the **Next** button

## Adding Document(s)

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

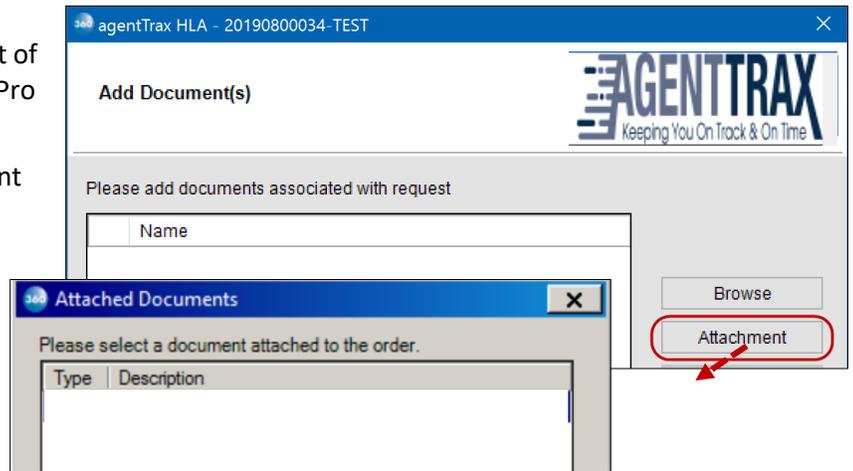
If from your local drive

- 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

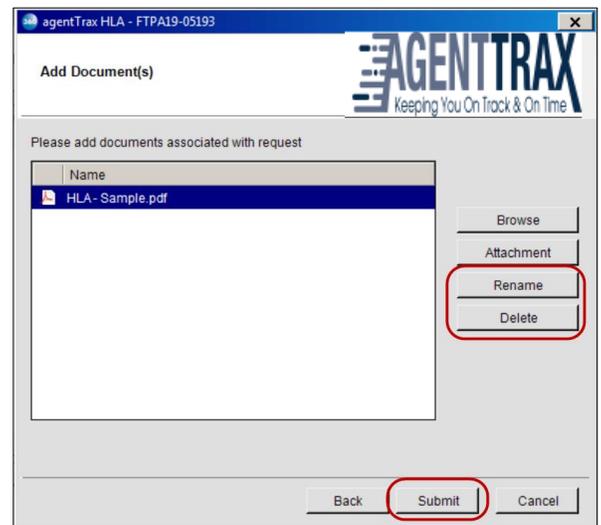
NOTE: High Liability Approval requests **require** at least one document be submitted with the request.

If from your **Attachment** folder in SoftPro

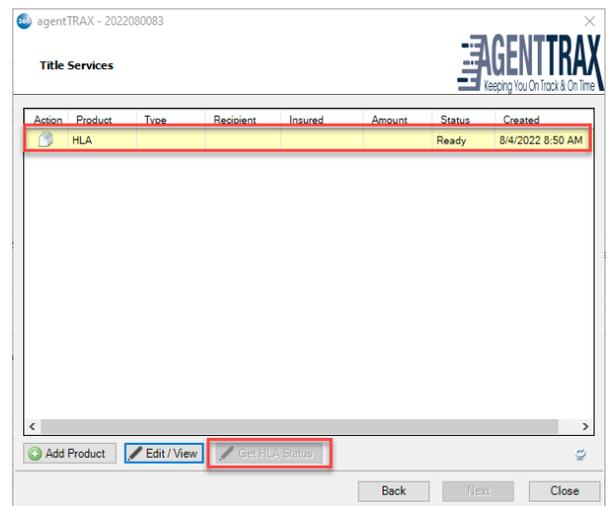
- a. Click the **Attachment** button; this opens the list of attachments in your SoftPro order
- b. Double-click the document you wish to submit



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.

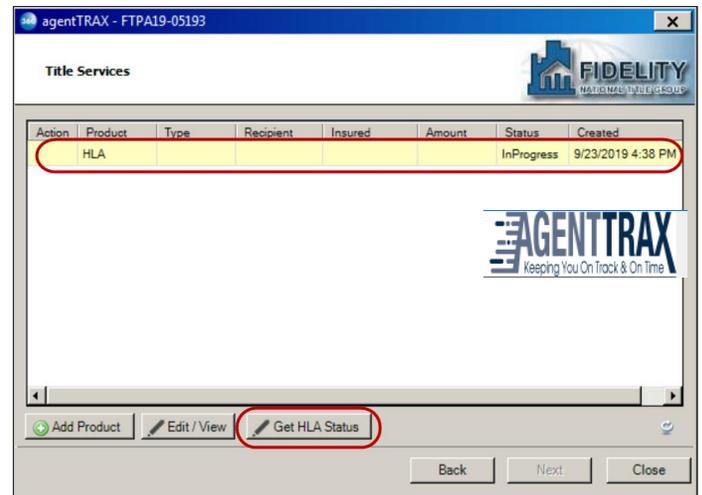


11. Once submitted, the **Title Services** window shows the **Status** as **InProgress** until the HLA is Approved. As soon as the user receives an approval notification from agentTRAX, the Status on the **Title Services** window and will be automatically updated to **Ready** and the **Get HLA Status**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



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

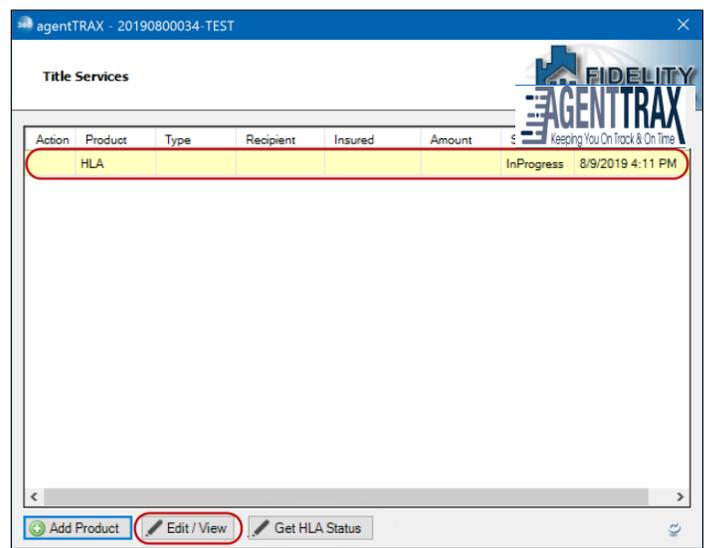


## Editing a Submitted Request

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



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
  - 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 - 20190800034 - TEST

**High Liability Approval**

**AGENTTRAX**  
Keeping 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

agentTrax HLA - 20190800034 - TEST

**High Liability Approval Order Information**

**AGENTTRAX**  
Keeping You On Track & On Time

Contact: Melissa Taylor  
 First Name: Melissa  
 Phone Number: (919) 555-5555

Policy Type: Loan  
 Owner: [Redacted]

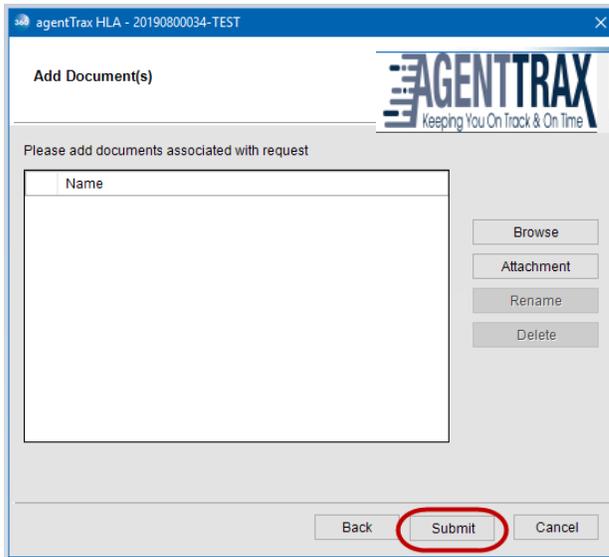
Premium Details: [Redacted]

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

Brief description of transaction and improvements: [Redacted]

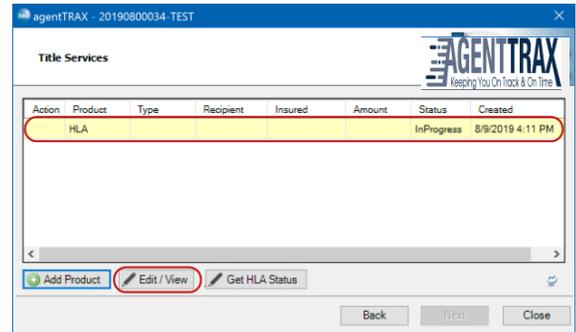
Next Cancel



## Canceling a Request

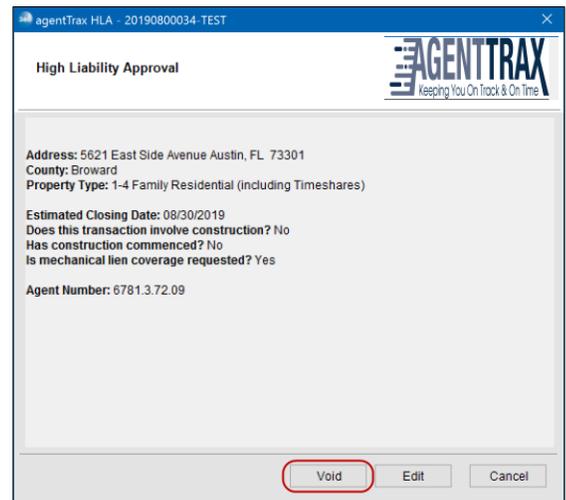
From the **Title Services** window,

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

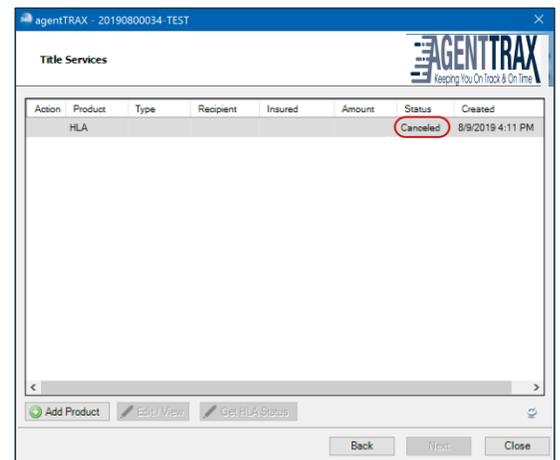


The **High Liability Approval** window shows the details of your original request.

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



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



## Automation

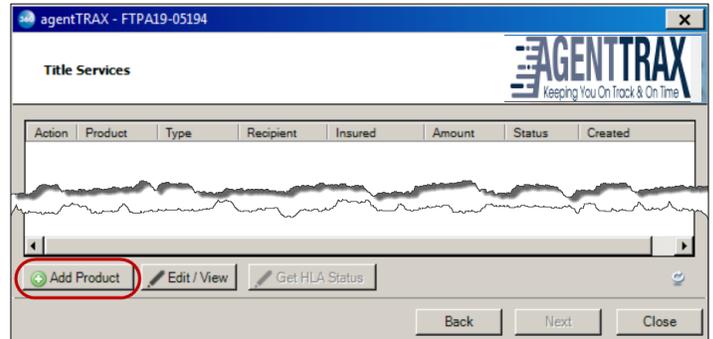
The HLA product comes with Accept Automation allowing the user to automatically accept the Approval document into the order.

## Creating the Policy Jacket(s)

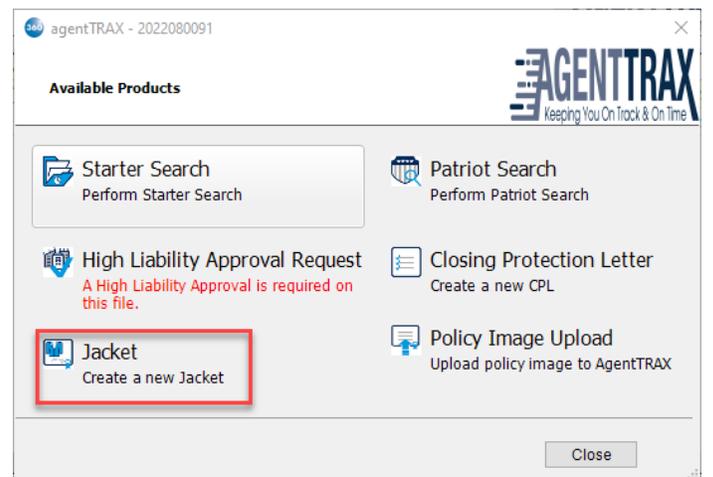
1. Access the **Title Services** window; refer to **Steps 1-9** ([here](#)) if needed

From the **Title Services** window,

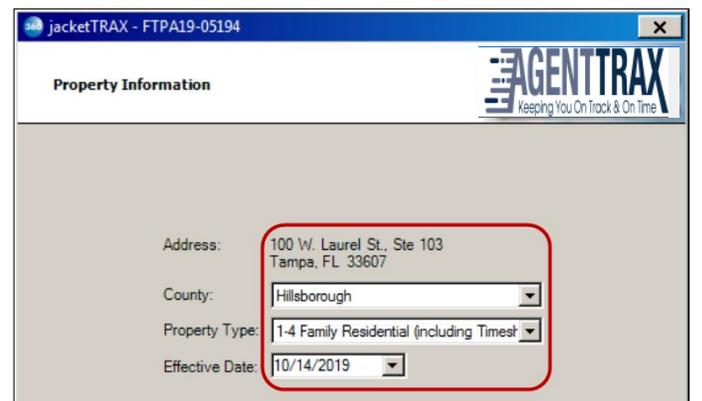
2. Click the **Add Product** button to open the **Available Products** window.



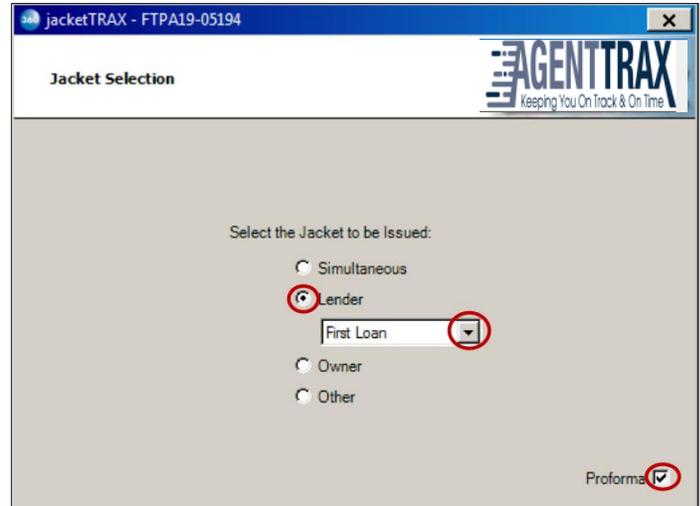
3. Click the **Jacket** link



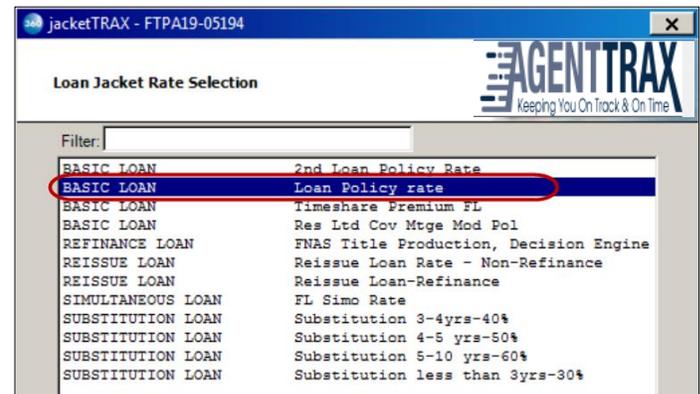
4. From the **Property Information** window, verify or select the,
  - a) **Address**
  - b) **County**
  - c) **Property Type**
  - d) **Effective Date**



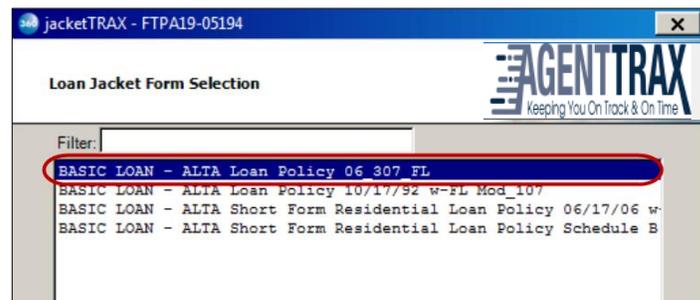
5. Check the radio button for the Jacket to be issued
6. If a Lender policy and multiple loans, select the corresponding loan from the drop-down
7. Check the Proforma check box if applicable
8. Click the Next button



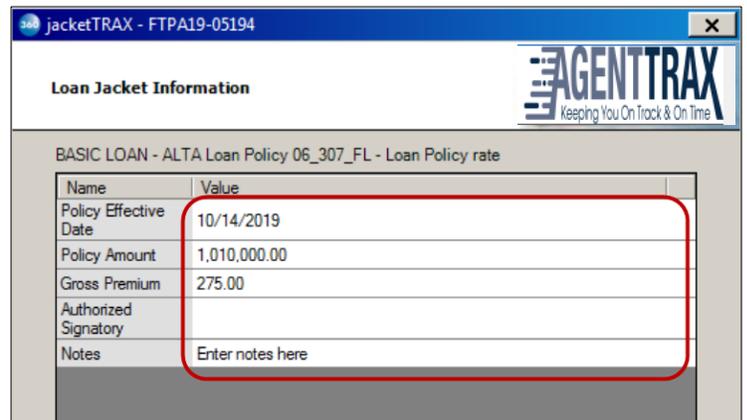
9. From the **Loan Jacket Rate Selection** window, highlight the applicable rate
10. Click the **Next** button



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



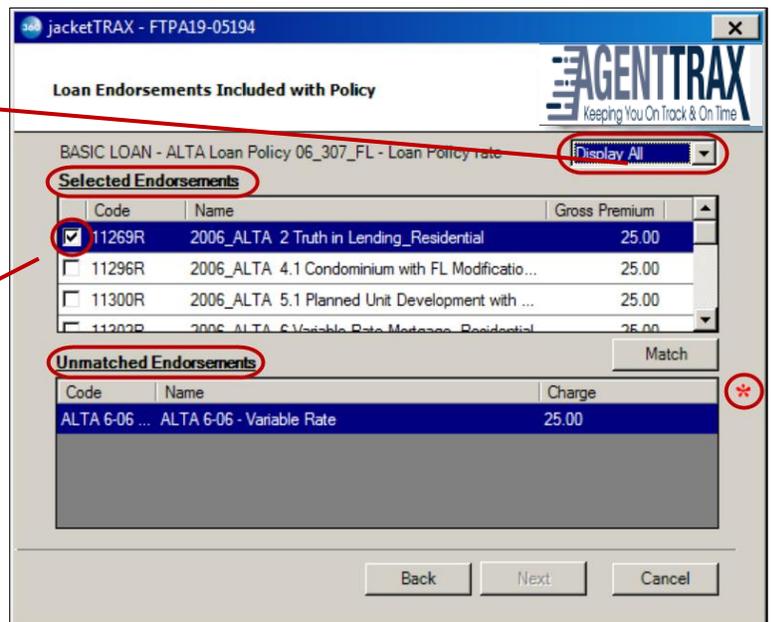
13. Verify the **Loan Jacket Information**



**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 endorsements sent from AgentTRAX (matched and unmatched)
- **Display Selected** - shows only those endorsements that match the endorsements selected in your ProForm order
- **Matched** endorsements are shown with a checked check box
- **Display Unselected** – shows endorsements selected in your order but **unmatched** to an AgentTRAX endorsement



NOTE: You cannot proceed until all **Unmatched Endorsements** are matched as noted by the **red asterisk**.

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.

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

Loan Endorsements Included with Policy

BASIC LOAN - ALTA Loan Policy 06\_307\_FL - Loan Policy rate Display All

**Selected Endorsements**

Code	Name	Gross Premium
<input checked="" type="checkbox"/>	11269R 2006_ALTA 2 Truth in Lending_Residential	25.00
<input type="checkbox"/>	11296R 2006_ALTA 4.1 Condominium with FL Modificatio...	25.00
<input type="checkbox"/>	11300R 2006_ALTA 5.1 Planned Unit Development with ...	25.00
<input type="checkbox"/>	11202R 2006_ALTA 6 Variable Rate Mortgage_Residential	25.00

**Unmatched Endorsements**

Code	Name	Charge
ALTA 6-06 ...	ALTA 6-06 - Variable Rate	25.00

Match

Back Next Cancel

3. From the **agentTRAX Endorsements** drop-down, select the corresponding endorsement
4. Click the **OK** button
5. Repeat **Steps 1-4** until all unmatched endorsements are matched

Match Endorsement

Proform Order Endorsement - ALTA 6-06 (FL) ALTA 6-06 - Variable Rate

AgentTrax Endorsements :

11302R 2006\_ALTA 6 Variable Rate Mortgage\_Residential

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

6. Click **Next** to continue

Loan Endorsements Included with Policy

BASIC LOAN - ALTA Loan Policy 06\_307\_FL - Loan Policy rate Display Selected

**Selected Endorsements**

Code	Name	Gross Premium
<input checked="" type="checkbox"/>	11269R 2006_ALTA 2 Truth in Lending_Residential	25.00
<input checked="" type="checkbox"/>	11302R 2006_ALTA 6 Variable Rate Mortgage_Residential	25.00
<input checked="" type="checkbox"/>	11315R 2006_ALTA 8.1 Environmental Protection Lien with F...	25.00

**Unmatched Endorsements**

Code	Name	Charge
------	------	--------

Match

Back Next Cancel

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

Name	Gross Premium
<input type="checkbox"/> Buyer CPL Fee	25.00
<input checked="" type="checkbox"/> FL Surcharge	3.28
<input type="checkbox"/> FL-AGENCY OTHER INC	25.00
<input type="checkbox"/> FL-CSL	25.00
<input type="checkbox"/> FL-CTY TAX - NO COMM	
<input type="checkbox"/> FL-CTY TAX - NO COMM	
<input type="checkbox"/> FL-SEARCH FEE	
<input type="checkbox"/> FL-SEARCH FEE	
<input type="checkbox"/> FL-SURVEY	
<input type="checkbox"/> FL-SURVEY	

Buttons: Back, **Next**, Cancel

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

Check Amount: \$

Check Number:

Policy Gross Premium \$ 275.00

Endorsement Gross Premium \$ 75.00

Other Fees Gross Premium \$ 03.28

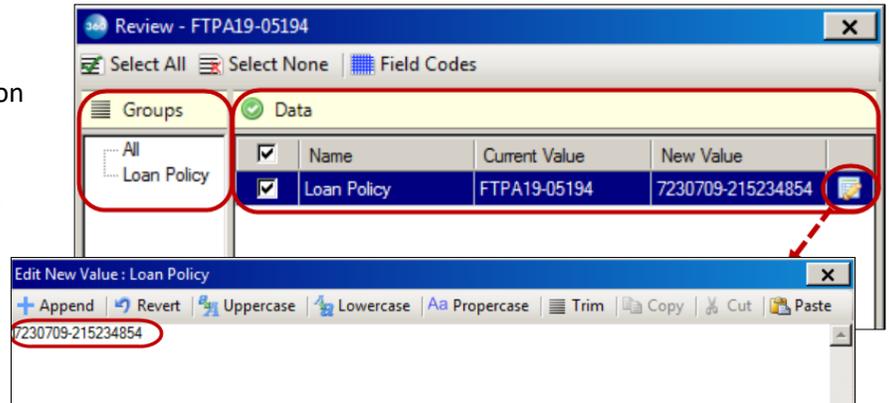
Total Gross Amount: \$ 353.28

Buttons: Back, **Submit**, Cancel

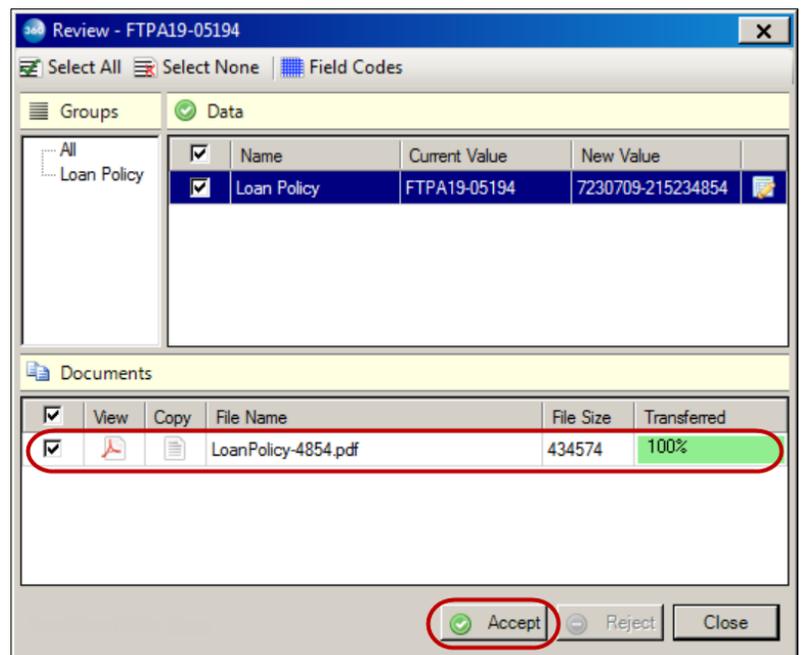
## Reviewing the Policy Jacket(s)

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.

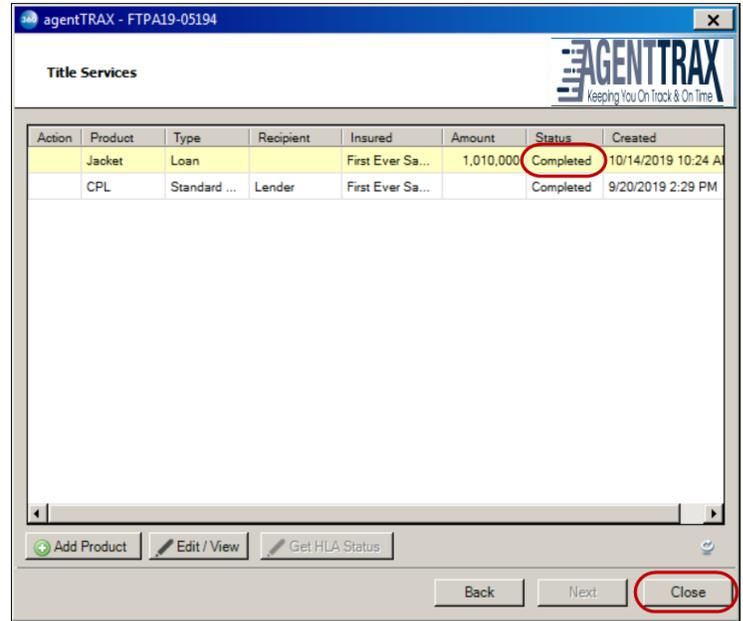


- **Documents** – shows the Policy Jacket(s) issued
    - View – allows you to view the document on screen
    - Copy – places a copy of the document on your Clipboard allowing you to paste it to another program
11. Click the **Accept** button



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

12. Click the **Close** button

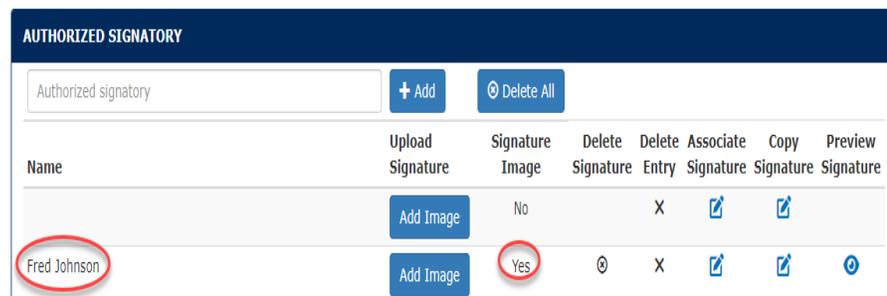


### Authorized Signatory: Printing a signature image on the Jacket

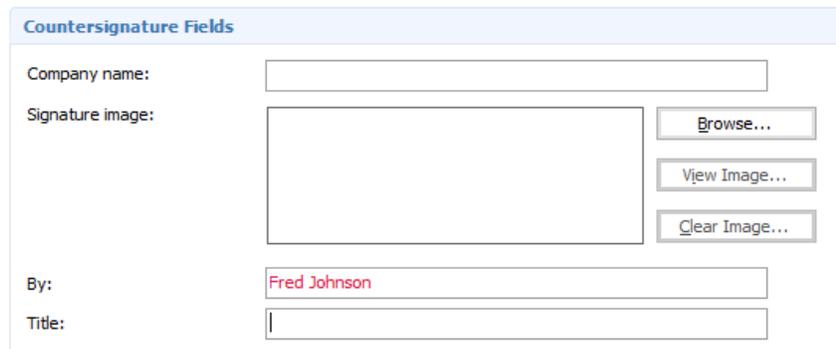
**Pre-requisite:** The user must have an image loaded in the AgentTRAX Preferences screen for this function to work

### AGENTTRAX PREFERENCES

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



1. 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.



- 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.

Name	Value
Policy Effective Date	10/14/2019
Policy Amount	1,010,000.00
Gross Premium	275.00
Authorized Signatory	Fred Johnson
Notes	Enter notes here

## Submitting Final Policy Documents

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

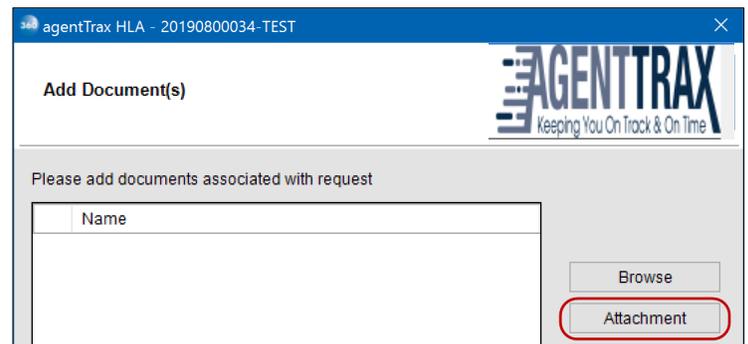
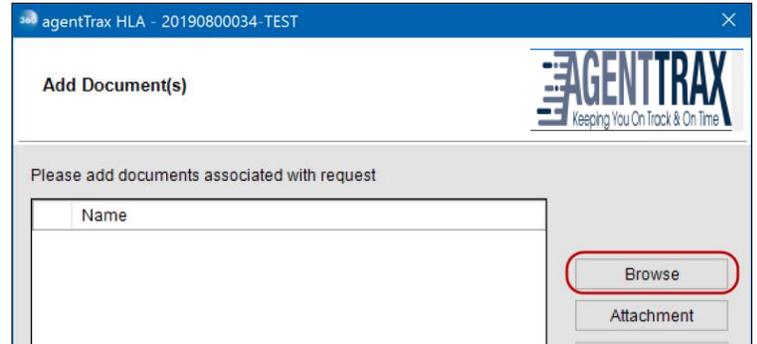
From the **Title Services** window,

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

- Click the **Policy Image Upload** link

## Adding Document(s)

4. Select your document(s)
  - 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
  - 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



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

