

American Eagle Closing Protection Letter User Guide

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History

Date	Version	Details
January, 2024	1.0	Original Release

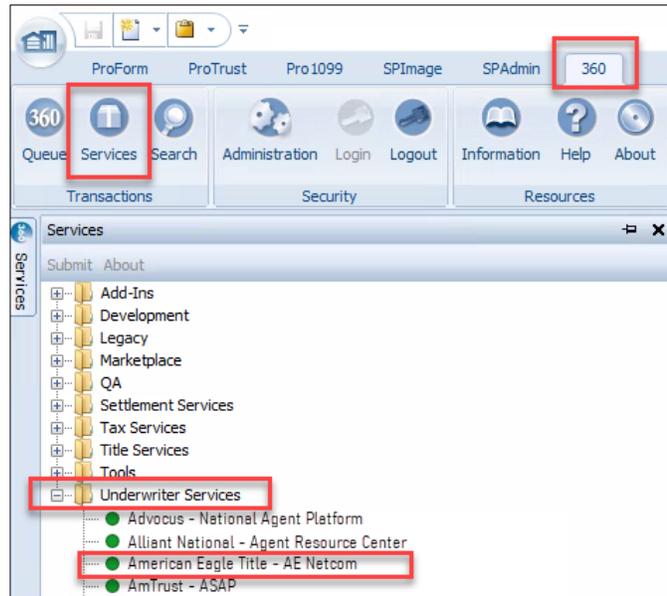
Introduction

The American Eagle integration with SoftPro 360 will allow you to seamlessly order American Eagle products within ProForm. In this version, SoftPro 360 will be able to create an American Eagle file corresponding to your ProForm Order and enable you to order CPLs through American Eagle as well as void those that you've created through the Order without leaving your SoftPro workspace, helping to facilitate a more efficient workflow by reducing or eliminating the duplication of data.

Accessing American Eagle

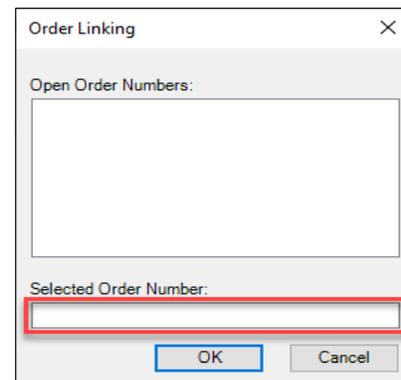
From the Select toolbar:

1. Select the Services tab
2. Click the **Underwriter Services** folder to expand
3. Double-click **American Eagle Title – AE Netcom**



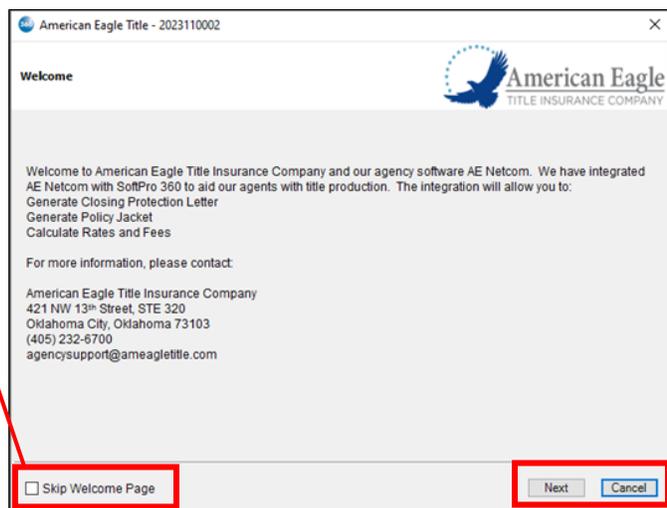
The **Order Linking** window displays to connect the integration.

4. Link an order
 - a. If no order is open, enter the corresponding order in the **Selected Order Number** field
 - b. If an order is open, the Integration populates the **Open Order Numbers** with the active order and automatically links to the order for you
5. Click the **OK** button to continue



Once a ProForm Order is linked, the **Welcome** screen displays.

6. You can check the **Skip Welcome Page** check box to skip having the **Welcome** screen display each time you log into American Eagle Title.
7. Click the **Next** button to continue or **Cancel** to exit the integration.



Logging into American Eagle

- The **Login** screen requires a valid American Eagle username and password be entered.
- Check the **Remember Me** check box to login automatically when the launching American Eagle Title in future sessions.
- Click the
 - » **Next** button to continue
 - » **Back** to return to the **Welcome** screen
 - » **Cancel** to exit the American Eagle integration

Organization Selection Screen

The **Organization Screen** appears providing a list of the organizations for the American Eagle integration. You can check the **Remember Me** check box to select the organization automatically after the **Welcome** screen.

- Click **Next** to proceed to the **Summary** screen

ID	Name
4	Test Company
10	Another Company
298	SoftPro Integration

Validate Mandatory ProForm Data Screen

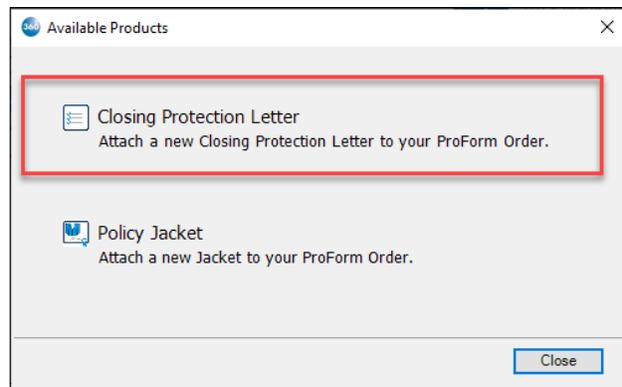
The **Validate Mandatory ProForm Data** screen displays the property states of the ProForm order that do not match any returned from American Eagle for the logged in user.

- Click the **Close** button to exit the American Eagle process and return to the ProForm Order to correct.



Available Products Screen

- Select **Closing Protection Letter** to navigate to the **CPL Information** screen.
- Click **Close** to return to the **Summary** screen.



Property Information Screen

The **Property Information Screen** displays property information entered in the ProForm order.

- **Property Address -**

Displays any properties in the ProForm order that match what was returned from American Eagle.

If there is only one property address that matches it defaults to that property, otherwise, it defaults to **-Select Property Address-** allowing the user to select the applicable property.

- **Property Type -** Displays a list of the **Property Types** returned from American Eagle. It will default to the Property Type for the selected property, if there is no Property Type selected for the property, it defaults to **-Select Property Type-** allowing the user to select an option.

- **Address 1**

- To pull Address 1 from ProForm of the selected Property Address
- Required

- **Address 2**

- To pull Address 2 from ProForm of the selected Property Address
- Required

- **City**

- To pull City from ProForm of the selected Property Address
- Required

- **County**

- To pull County from ProForm of the selected Property Address
- Required

- **State**

- To pull State from ProForm of the selected Property Address
- Required

- **Zip**

- To pull Zip from ProForm of the selected Property Address
- Required

The screenshot shows a web application window titled "American Eagle Title - 2023110002". The main content area is titled "Property Information Screen" and features the American Eagle Title Insurance Company logo. The form contains the following fields:

- Property Address:** A dropdown menu showing "123 test st, Armstrong, OK, 78338".
- Property Type:** A dropdown menu showing "Single Family".
- Address:** A text input field containing "123 test st".
- City:** A text input field containing "Armstrong".
- County:** A text input field containing "Kenedy".
- State:** A text input field containing "OK".
- Zip:** A text input field containing "78338-".

At the bottom right of the form, there are two buttons: "Next" and "Cancel".

Click **Next** to continue to the **CPL information** screen.

Issuing Office/Agent/Approved Attorney Screen

When **Closing Protection Letter (CPL)** is selected, the **Issuing Office/Agent/Approved Attorney** screen displays.

- **Agent/Approved Attorney**
 - Select the Issuing Agent/Attorney to send to American Eagle.
 - Required
 - **Issuing Office**
 - Select the Issuing Office to send to American Eagle.
 - Required
- Click **Back** to return to the **Property Information** screen.
 - Click **Next** to proceed to enter the **CPL Information** screen.
 - Click **Cancel** to return to the **Summary** screen.

The screenshot shows the 'Issuing Office/Agent/Approved Attorney Information Screen' in the American Eagle Title software. The window title is 'American Eagle Title - 2023110002'. The screen contains the following fields:

- Agent/Approved Attorney Selection:** A dropdown menu with '508 - SoftPro' selected.
- Issuing Office Information:**
 - Issuing Office:** A dropdown menu with 'Escrow Company' selected.
 - Name:** A text field containing 'Escrow Company'.
 - Address:** A text field containing '987 test st'.
 - City:** A text field containing 'Chandler'.
 - State:** A dropdown menu with 'AZ' selected.
 - Zip:** A text field containing '85224'.
 - Issuing Office's ALTA Registry Id:** An empty text field.

At the bottom right, there are three buttons: 'Back', 'Next', and 'Cancel'.

CPL Information Screen

From the **CPL Information Screen** you'll select the Form Type and Loan information.

- **Form Type**
 - Select the Transaction Type to send to American Eagle.
 - Required
 - **Loan Selection**
 - Loan Selection displays all of the loans associated with the ProForm order. Select from the drop-down.
- Click **Back** to return to the **Issuing Office/Agent/Approved Attorney** screen.
 - Click **Submit** to send the data to America Eagle.
 - Click **Cancel** to return to the **Summary** screen.

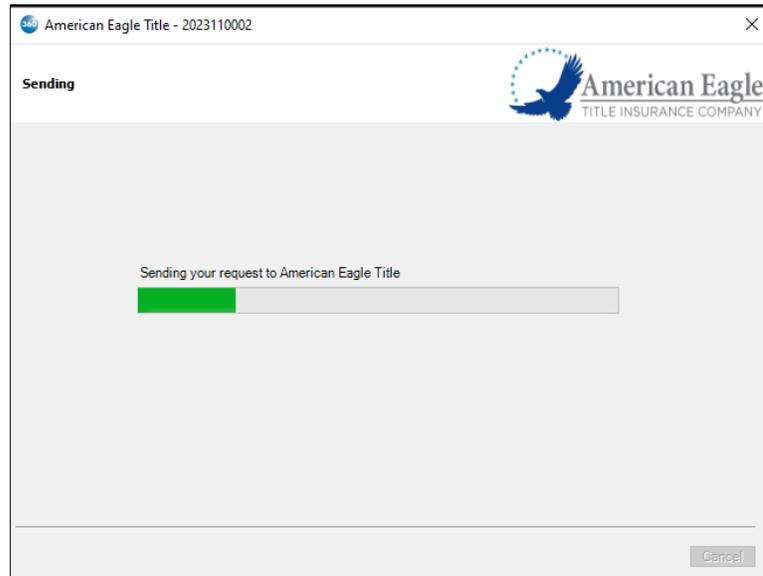
The screenshot shows the 'CPL Information Screen' in the American Eagle Title software. The window title is 'American Eagle Title - 2023110002'. The screen contains the following fields:

- Form Type:** A dropdown menu with 'ALTA CPL Single Transaction (04/02/2021)' selected.
- Closing Date:** A date field with '01/25/2024' and a calendar icon.
- Issue Date:** A date field with '01/25/2024' and a calendar icon.
- Buyer Name:** A text field containing 'John Smith'.
- Seller Name:** A text field containing 'Tom Hanks'.
- Lender Information:**
 - Loan Selection:** A dropdown menu with 'Lender \$250,000.00' selected.
 - Loan Number:** A text field containing '132246'.
 - Name:** A text field containing 'Lender'.
 - Address:** A text field containing '132 test st'.
 - City:** A text field containing 'Chandler'.
 - State:** A dropdown menu with 'AZ' selected.
 - Zip:** A text field containing '85224-_____'. Below it is an unchecked checkbox labeled 'ISAOA'.

At the bottom right, there are three buttons: 'Back', 'Submit', and 'Cancel'.

CPL Sending Screen

The **Sending** screen displays with a status bar when sending the product request to American Eagle.

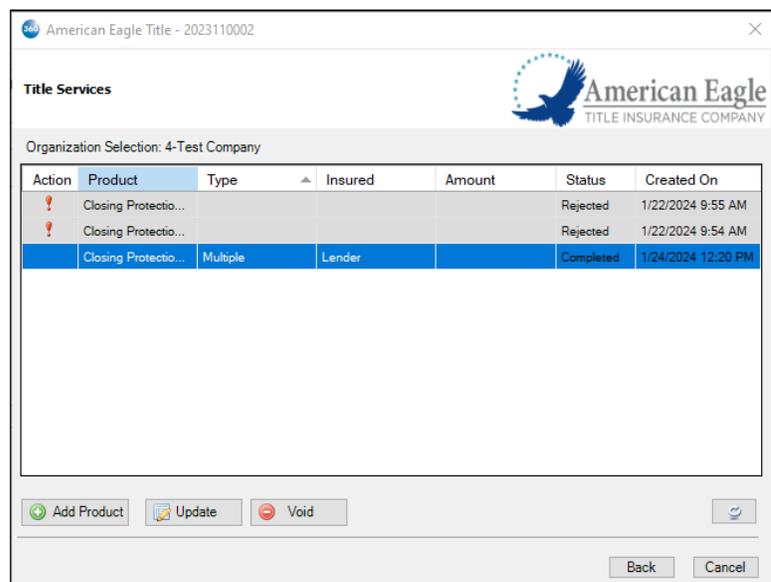


Title Services Screen

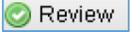
Once the product is received from **American Eagle Title**, the **Title Services** screen shows the **Status** as **Ready**.

The **Title Services** screen provides:

- A list of the CPLs that have been ordered.
- Ability to view order data that has been sent to American Eagle.
- **Add Product**: allows you to order a CPL.
- **Update**: allows you to update a **Completed** transaction.
- **Void**: allows you to cancel a **Completed** transaction.



A table displays the products ordered from American Eagle and provides the following information for each CPL:

- **Action:**
 -  - 360 has received the CPL from American Eagle (**Status = Ready**) and it is ready for the user to accept. Clicking the  icon displays the **Review** screen; available options are **Review** and **Accept** the product.
 - Red Exclamation Mark  - The request submitted to American Eagle encountered an error and no product was created. Hover over the exclamation mark or double-click it to view a description of the error.
- **Product:** The type of product requested from American Eagle. For CPLs, the value will always be **Closing Protection Letter**.
- **Type:** Displays the type of product requested from American Eagle. If CPL is requested, it will display the Covered Party (i.e., Lender, Buyer/Borrower or Seller).
- **Insured:** Insured Party.
- **Amount:** Liability amount appears for policy jackets only.
- **Status:**
 - **Ready:** 360 has received the remitted document from American Eagle and is ready for review and accept (attach to the order).
 - **Completed:** The remitted product was accepted and attached to the order.
 - **Rejected:** An error occurred with the submission of the request.
 - **Canceled:** The product was voided.
- **Created On:** Date and time stamp of when the product was generated.

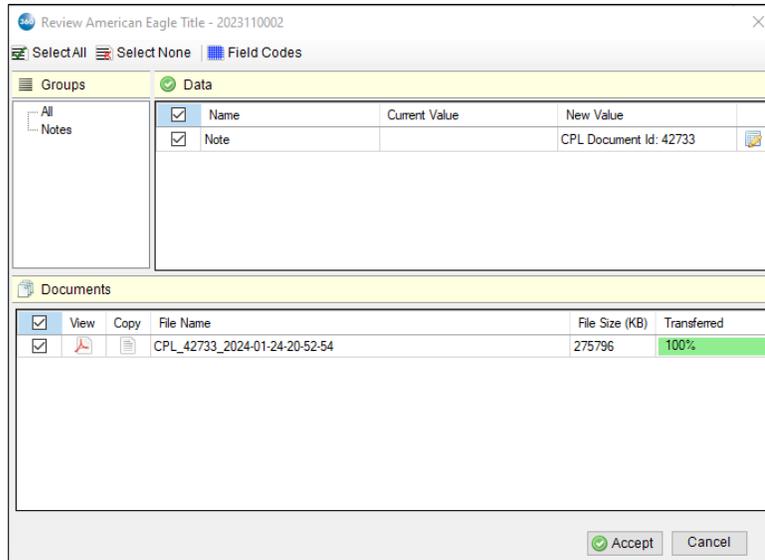
The data displayed in the table can be sorted by clicking the column header. Click once to sort in ascending order, click again to sort in descending order.

Reviewing CPL from American Eagle

Once the product is received from **American Eagle Title**, the **Title Services** screen shows the **Status** as **Ready**.

Click the **Action**  icon to open the **Review** screen and **Accept** the document and data, if any, writing back to the ProForm order.

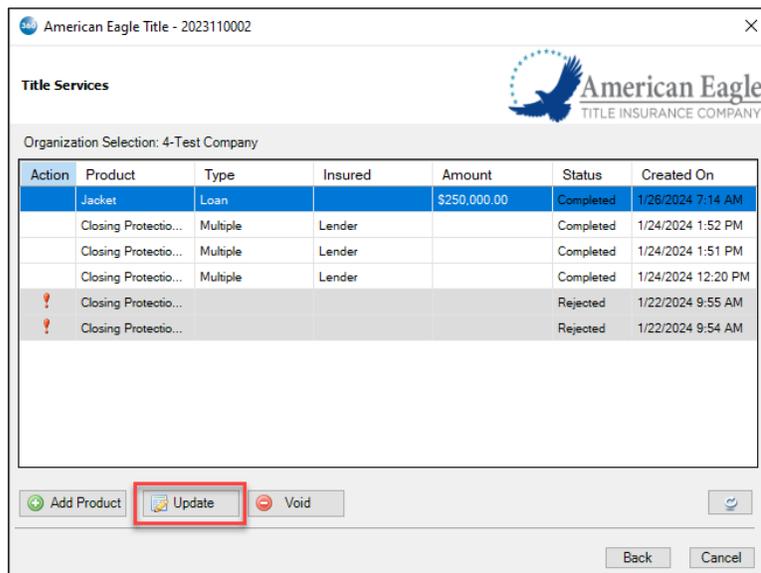
- Click **Accept** to import the data and documents into the corresponding order.
- CPL information
 - **CPL Document ID**
This value will produce a note in the ProForm Order.



Updating CPL

From the **Title Services** screen, you can edit a CPL you previously created from the order.

- Highlight the CPL transaction from the list that you want to edit and click the **Update** button.



Voiding CPL

From the **Title Services** screen, you can void a CPL that you previously created from the order.

- Highlight the CPL transaction from the list that you want to edit and click the **Void** button.
- When prompted, “Are you sure you want to Void Closing Protection Letter?”
 - Click **Yes** to send the void request to American Eagle.
 - Click **No** to return to the **Summary** screen.
- Once the void has been sent to American Eagle, the **Status** is changed to **Canceled**.

The screenshot shows the 'Title Services' interface for American Eagle Title Insurance Company. The window title is 'American Eagle Title - 2023110002'. The organization selection is '4-Test Company'. Below this is a table with the following data:

Action	Product	Type	Insured	Amount	Status	Created On
	Jacket	Loan		\$250,000.00	Completed	1/26/2024 7:14 AM
	Closing Protectio...	Multiple	Lender		Completed	1/24/2024 1:52 PM
	Closing Protectio...	Multiple	Lender		Completed	1/24/2024 1:51 PM
	Closing Protectio...	Multiple	Lender		Completed	1/24/2024 12:20 PM
!	Closing Protectio...				Rejected	1/22/2024 9:55 AM
!	Closing Protectio...				Rejected	1/22/2024 9:54 AM

At the bottom of the interface, there are buttons for 'Add Product', 'Update', 'Void', 'Back', and 'Cancel'. The 'Void' button is highlighted with a red box.