

# American Eagle Policy Jacket User Guide

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January 2024

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## History

Date	Version	Details
January, 2024	1.0	Original Release

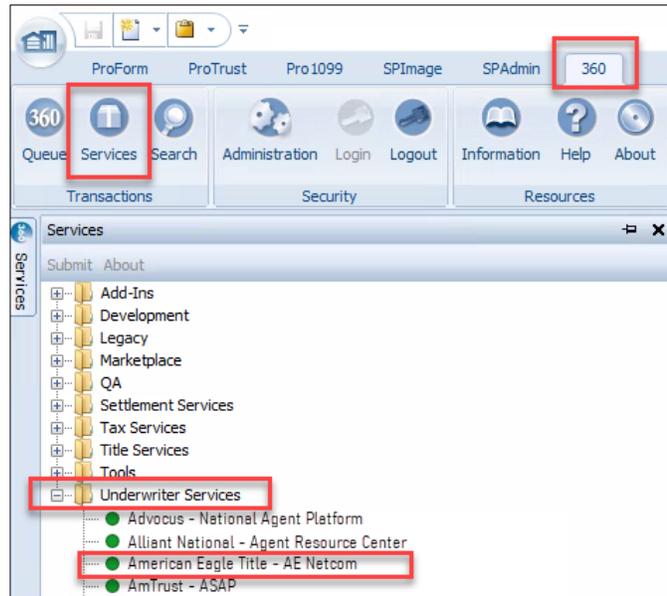
## Introduction

The American Eagle integration with SoftPro 360 allows 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 Policies 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

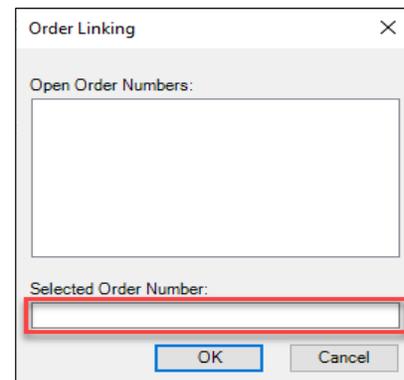
From the Select toolbar:

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



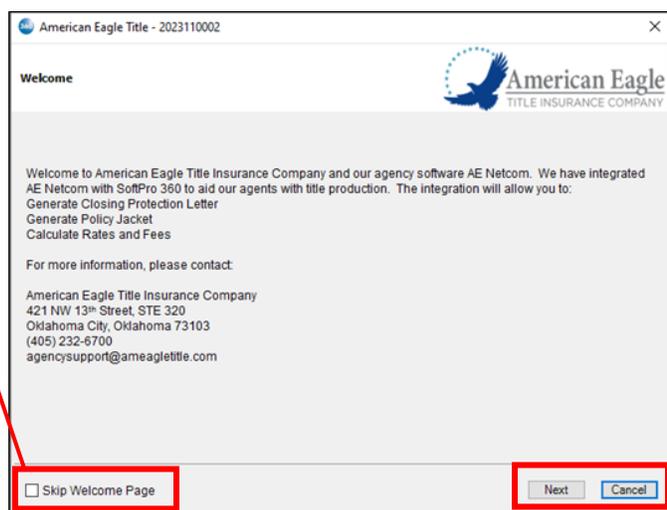
The **Order Linking** window displays to connect the integration.

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



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

- You can check the **Skip Welcome Page** check box to skip having the **Welcome** screen display each time you log into American Eagle Title.
- 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

## Validate Mandatory ProForm Data Screen

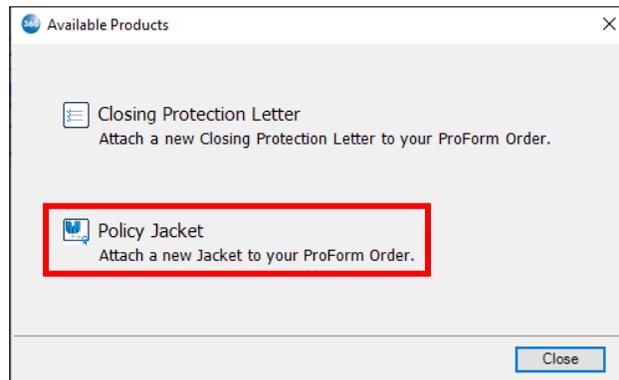
The **Validate Mandatory ProForm Data** screen displays the property states of the ProForm order that do not match any returned from American Eagle for the logged in user.

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



## Available Products Screen

- Select **Policy Jacket** to navigate to the **Property Information** screen.
- Click **Close** if you wish 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

Click **Next** to continue to the **Policy Selection Information** screen.

## Policy Selection Screen

The **Policy Selection** screen displays allowing the user to select the policy(s) to request from American Eagle.

- Click **Back** to return to the Property Information screen.
- Click **Next** to proceed to the Policy Information and Lender Information screens.
- Click **Cancel** to return to the Summary screen.

Include	Policy	Loan/Owner
<input checked="" type="checkbox"/>	Loan	Loan 1 - Lender \$250,000.00 132246
<input type="checkbox"/>	Loan	Loan 2 - Lender \$50,000.00 963258741
<input type="checkbox"/>	Owner	Owner 1 - \$500,000.00
<input type="checkbox"/>	Commitment	

## Loan Policy Information Screen

If a Loan Policy is selected, the **Loan Policy Information Screen** displays.

From this screen select the,

- **Form Type**
  - Select the Policy **Form Type** to send to American Eagle.
  - Required
- **Effective Date** – pulls from the **Effective Date/Time** field in the ProForm order. This is a required field.
- **Liability Amount** – pulls from the **Policy Coverage Amount** field in the ProForm order. This is a required field.
- **Gross Premium** – pulls from the **Premium to Split** field in the ProForm order. This is a required field.

Endorsement	Gross Amount
<input checked="" type="checkbox"/> ALTA Endorsement 1-06 Street Assessments (6-17-06)	\$0.00
<input type="checkbox"/> ALTA Endorsement 3-06 Zoning Unimproved Land (6-17-06)	
<input type="checkbox"/> ALTA Endorsement 3.1-06 Zoning-Completed Structure (10-22-09)	
<input type="checkbox"/> ALTA Endorsement 3.2-06 Zoning - Land Under Development (04-02-12)	
<input type="checkbox"/> ALTA Endorsement 4-06 Condominium - Assessments Priority (2-3-10)	
<input type="checkbox"/> ALTA Endorsement 4.1-06 Condominium - Current Assessments (10-16-08)	

- **AETIC Premium** – pulls from the **Final Premium** field under the **Split** section in the ProForm order. This is a required field.
- **Endorsement**
  - Endorsements applicable to the policy can be selected by checking the corresponding check box.
  - The amount charged for the endorsement can be entered in the **Gross Amount** field; \$0.00 is an acceptable input. Required when endorsement check box is selected.
- Click **Back** to return to the **Policy Selection** screen.
- Click **Submit** to send the data to America Eagle.
- Click **Cancel** to return to the **Summary** screen.

## Owner Policy Information Screen

If an Owner Policy is selected, the **Owner Policy Information Screen** displays. From this screen select the,

- **Form Type** – select the policy Form Type to be sent to American Eagle. This is a required field.
- **Effective Date** – pulls from the **Effective Date/Time** field in the ProForm order. This is a required field.
- **Liability Amount** – pulls from the **Policy Coverage Amount** field in the ProForm order. This is a required field.
- **Gross Premium** – pulls from the **Premium to Split** field in the ProForm order. This is a required field.
- **AETIC Premium** – pulls from the **Final Premium** field under the **Split** section in the ProForm order. This is a required field.
- **Endorsement**
  - Endorsements applicable to the policy can be selected by checking the corresponding check box.
  - The amount charged for the endorsement can be entered in the **Gross Amount** field; \$0.00 is an acceptable input. Required when endorsement check box is selected.
- Click **Back** to return to the **Policy Selection** screen.
- Click **Submit** to send the data to America Eagle.

Endorsement	Gross Amount
<input checked="" type="checkbox"/> ALTA Endorsement 1-06 Street Assessments (6-17-06)	\$0.00
<input type="checkbox"/> ALTA Endorsement 3-06 Zoning Unimproved Land (6-17-06)	
<input type="checkbox"/> ALTA Endorsement 3.1-06 Zoning-Completed Structure (10-22-09)	
<input type="checkbox"/> ALTA Endorsement 3.2-06 Zoning - Land Under Development (04-02-12)	
<input type="checkbox"/> ALTA Endorsement 4-06 Condominium - Assessments Priority (2-3-10)	
<input type="checkbox"/> ALTA Endorsement 4.1-06 Condominium - Current Assessments (10-16-08)	

- Click **Cancel** to return to the **Summary** screen.

## Commitment Information Screen

If a Commitment is selected, the **Commitment Information Screen** displays. From this screen select the,

- **Form Type** – select the policy Form Type to be sent to American Eagle. This is a required field.
- **Effective Date** – pulls from the **Effective Date/Time** field in the ProForm order. This is a required field.
- Click **Back** to return to the **Policy Selection** screen.
- Click **Submit** to send the data to America Eagle.
- Click **Cancel** to return to the **Summary** screen.

## Policy Jacket Sending Screen

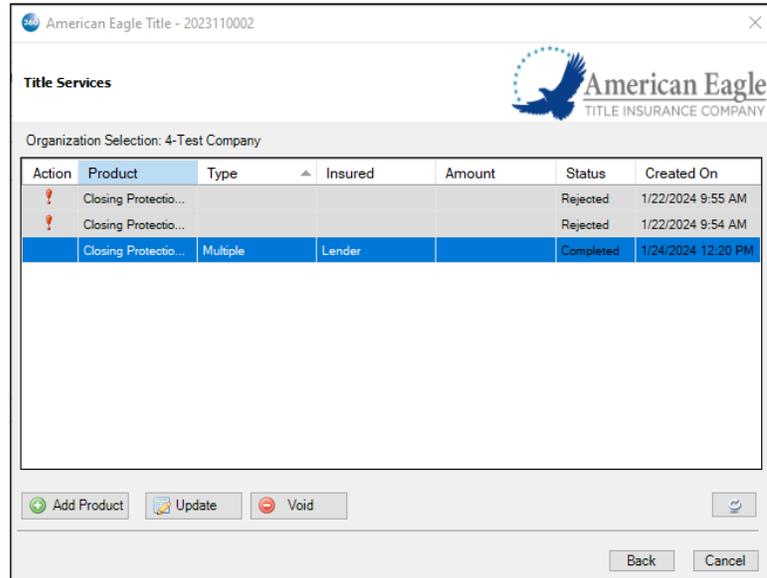
The **Sending** screen displays with a status bar when sending the product request to American Eagle.

## 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 Policy Jackets that have been ordered.
- Ability to view order data that has been sent to American Eagle.
- **Add Product:** allows you to order a Policy Jacket.
- **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 Policy Jacket:

- **Action:**
  - Review - 360 has received the Policy Jacket 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 jackets, the value will always be **Policy Jacket**.
- **Type:** Displays the type of product requested from American Eagle. If Policy Jacket is requested, it will display the type of Jacket requested.
- **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.

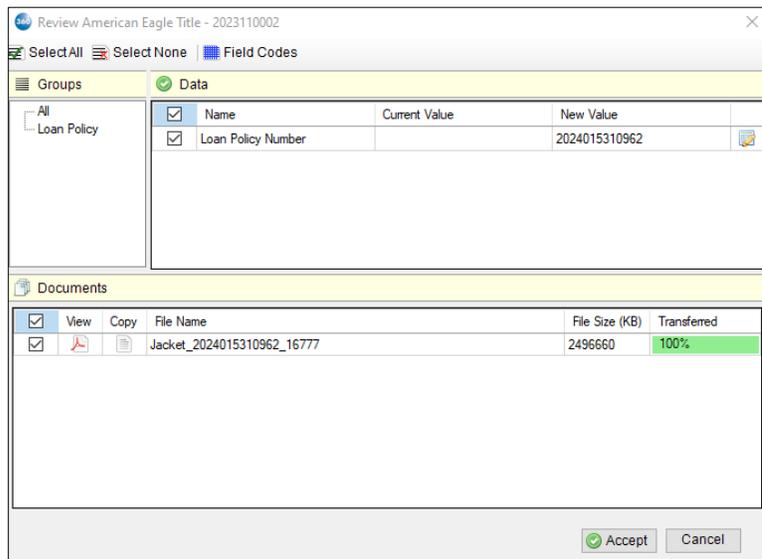
The data displayed in the table can be sorted by clicking the column header. Click once to sort in ascending order, click again to sort in descending order.

## Reviewing and Accepting Policy Jacket 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. When accepted, the Loan Policy Number writes back to the **Policy Number** field in the ProForm order.



The screenshot shows a window titled "Review American Eagle Title - 2023110002". It contains two main sections: "Data" and "Documents".

**Data Section:**

	Name	Current Value	New Value
<input checked="" type="checkbox"/>	Loan Policy Number		2024015310962

**Documents Section:**

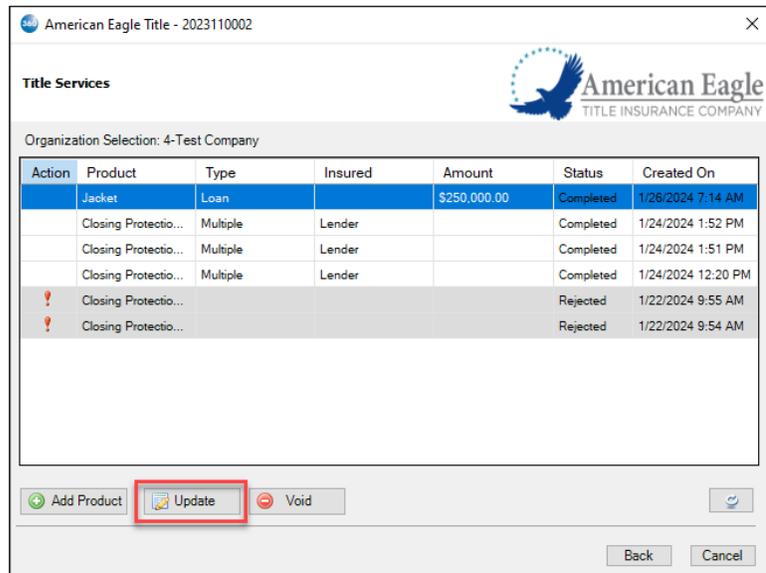
<input checked="" type="checkbox"/>	View	Copy	File Name	File Size (KB)	Transferred
<input checked="" type="checkbox"/>			Jacket_2024015310962_16777	2496660	100%

At the bottom right of the window, there are two buttons: "Accept" (with a green checkmark icon) and "Cancel".

## Updating Policy Jacket

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

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



## Voiding Policy Jacket

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

- Highlight the Policy Jacket transaction from the list that you want to edit and click the **Void** button.
- When prompted, “Are you sure you want to Void Jacket?”
  - 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**.

