

American Identity Group User Guide

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4800 Falls of Neuse Road, Suite 600 | Raleigh, NC 27609
p (800) 848-0143 | f (919) 755-8350 | www.softprocorp.com

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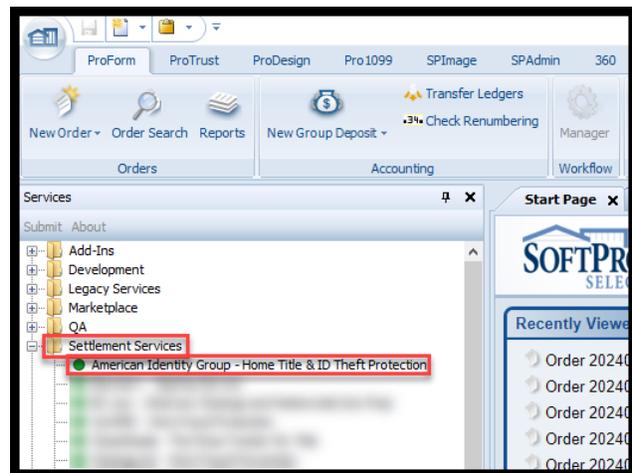
Introduction

American Identity Group allows users to order Home Title and Identity Theft Protection via SoftPro 360. The American Identity Group integration with SoftPro 360 provides users with the ability to seamlessly place orders for American Identity Products directly from SoftPro 360 without having to leave your SoftPro workspace, helping to facilitate a more efficient workflow by reducing or eliminating the duplication of data.

Accessing

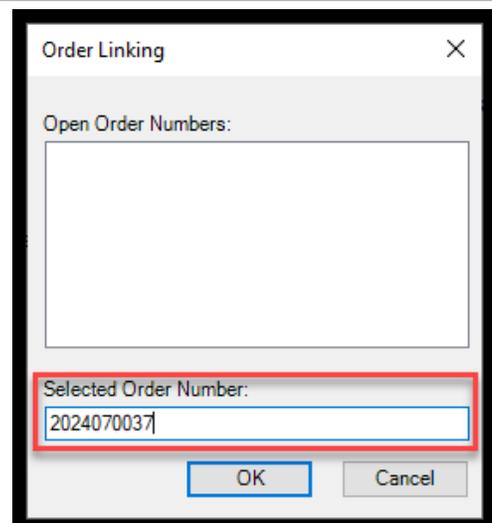
From the 360 toolbar

1. Select the Services tab.
2. Click the Settlement Services folder to expand.
3. Double-click **American Identity Group – Home Title & ID Theft Protection**.



Selecting a ProForm Order

Each transaction must be linked to a ProForm Order. If orders are currently open, the Active order will automatically be linked. If there aren't any open orders, the order number can be entered in the Selected order Number field of the Order Linking screen. Once the order is confirmed, click ok.



Products Screen

The **Products** screen allows a user to select the Home Title & Identity Theft Protection product and enter the price it was sold to the customer. Only one product can be ordered at a time.

- **Product:** List of the products offered by American Identity Group.
- **Price as Sold:** Field to enter the price the user sold the product to the customer by the user.
- **Suggested Retail Price:** The suggested price to be charged to the customer by the user.
- **AIG Wholesale Cost:** The price American Identity Group will charge the user.

Action	Product	Price as Sold	Suggested Retail Price	AIG Wholesale Cost
<input checked="" type="radio"/>	Home Title & ID Theft Protection 1 Year		\$108.00	\$54.00
<input type="radio"/>	Home Title & ID Theft Protection 2 Years		\$216.00	\$108.00
<input type="radio"/>	Home Title & ID Theft Protection 3 Years		\$324.00	\$162.00
<input type="radio"/>	Home Title & ID Theft Protection 4 Years		\$432.00	\$216.00
<input type="radio"/>	Home Title & ID Theft Protection 5 Years		\$540.00	\$270.00
<input type="radio"/>	Home Title & ID Theft Protection 6 Years		\$648.00	\$324.00
<input type="radio"/>	Home Title & ID Theft Protection 7 Years		\$756.00	\$378.00
<input type="radio"/>	Home Title & ID Theft Protection 8 Years		\$864.00	\$432.00

Information Screen

The **Information** screen allows the user to choose the individual the product is for by selecting a contact from the ProForm order by using the dropdown. To select an individual not listed in the ProForm order, users can select **Other** from the dropdown and manually enter the information.

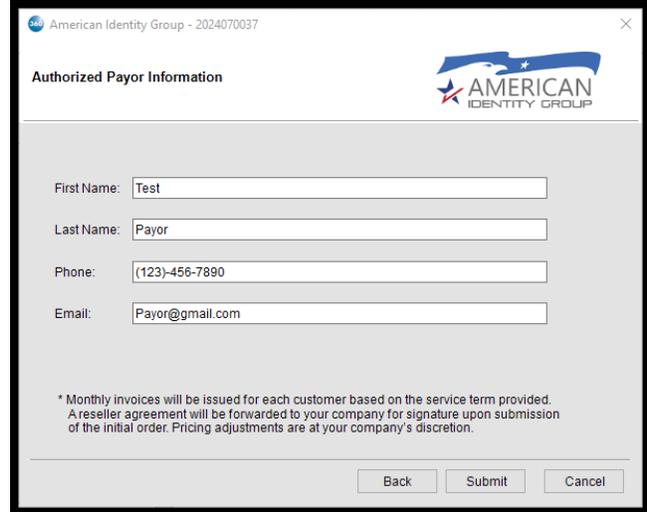
- **Account Holder Dropdown:** Choose the contact from the ProForm order to be associated with the product.
 - Users can choose **Other** to manually enter the information of an individual who is not listed in the ProForm order.
- **Address 1:** The first address line for the chosen contact will be populated from the ProForm order. Field can be manually entered if Other is chosen from the dropdown. Field can be edited within the integration.
 - Changes to the address line will not overwrite the ProForm order.
- **Address 2:** The second address line for the chosen contact will be populated from the ProForm order. Field can be manually entered if Other is chosen from the dropdown. Field can be edited within the integration.

- Changes to the address line will not overwrite the ProForm order.
- **City:** The city for the chosen contact will be populated from the ProForm order. Field can be manually entered if Other is chosen from the dropdown. Field can be edited within the integration.
 - Changes to the address line will not overwrite the ProForm order.
- **State:** The state for the chosen contact will be populated from the ProForm order. Field can be manually entered if Other is chosen from the dropdown. Field can be edited within the integration.
 - Changes to the address line will not overwrite the ProForm order.
- **Zip:** The zip code for the chosen contact will be populated from the ProForm order. Field can be manually entered if Other is chosen from the dropdown. Field can be edited within the integration.
 - Changes to the address line will not overwrite the ProForm order.
- **First Name:** The first name of the chosen contact will be populated from the ProForm order. Field can be manually entered if Other is chosen from the dropdown. Field can be edited within the integration.
 - Changes to the address line will not overwrite the ProForm order.
- **Last Name:** The last name of the chosen contact will be populated from the ProForm order. Field can be manually entered if Other is chosen from the dropdown. Field can be edited within the integration.
 - Changes to the address line will not overwrite the ProForm order.
- **Email:** The email address for the chosen contact will be populated from the ProForm order. Field can be manually entered if Other is chosen from the dropdown. Field can be edited within the integration.
 - Changes to the address line will not overwrite the ProForm order.
- **Phone:** The phone number for the chosen contact will be populated from the ProForm order. Field can be manually entered if Other is chosen from the dropdown. Field can be edited within the integration.
 - Changes to the address line will not overwrite the ProForm order.
- **DOB:** The date of birth for the chosen contact can be manually entered into the integration.

Authorized Payor Information Screen

The Authorized Payor Information screen allows the user to enter the authorized payor information where the monthly invoices will be sent for the products sold. This information will be cached after the first order to assist in a seamless user experience but can be edited at any time.

- **First Name:** The first name of the individual who will receive the monthly invoices.
- **Last Name:** The last name of the individual who will receive the monthly invoices.
- **Phone:** The phone number of the individual who will receive the monthly invoices.
- **Email:** The email of the individual who will receive the monthly invoices.



A screenshot of a web form titled "Authorized Payor Information" from American Identity Group. The form is displayed in a browser window with the URL "American Identity Group - 2024070037". The American Identity Group logo is in the top right corner. The form contains four input fields: "First Name" with the value "Test", "Last Name" with the value "Payor", "Phone" with the value "(123)-456-7890", and "Email" with the value "Payor@gmail.com". Below the fields is a disclaimer: "* Monthly invoices will be issued for each customer based on the service term provided. A reseller agreement will be forwarded to your company for signature upon submission of the initial order. Pricing adjustments are at your company's discretion." At the bottom right of the form are three buttons: "Back", "Submit", and "Cancel".

Order Confirmation

Once the order has been submitted to American Identity Group, the customer who had been signed up for the Home Title & Identity Theft Protection product will receive an email from American Identity Group confirming the purchase of the product.