

# Conestoga

## User Guide Standard or Enterprise Version

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# Table of Contents

## Table of Contents

<i>History &amp; Introduction</i>	4
<i>Accessing Conestoga</i>	4
<i>Logging into Conestoga</i>	5
<i>Agent Selection Screen</i>	5
<i>Title Service Screen</i>	6
<i>Product Selection Screen</i>	6
<i>Commitment Jacket Request</i>	6
<i>Closing Protection Letter Request</i>	7
<i>Policy Jacket Request</i>	8
<i>Editing or Voiding a CPL or Jacket</i>	9

## History

Date	Details

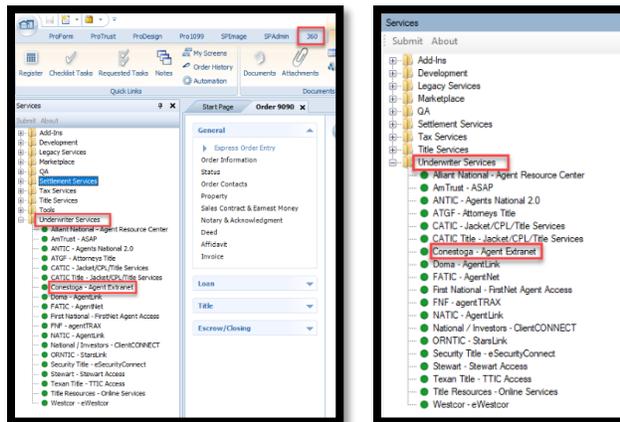
## Introduction

The Conestoga integration with SoftPro 360 will allow ordering of Conestoga products using the data within ProForm. SoftPro 360 will be able to create a Conestoga file corresponding to information in the ProForm order and enable ordering Closing Protection Letters and Policy Jackets through Conestoga. All available without having to leave the SoftPro workspace, helping to facilitate a more efficient workflow by reducing or eliminating the duplication of data.

## Accessing Conestoga

From the Select toolbar:

1. Click SoftPro 360 Console
2. Select the Services Menu
3. Click the Underwriter Services folder to expand
4. Double-click **Conestoga – Agent Extranet**

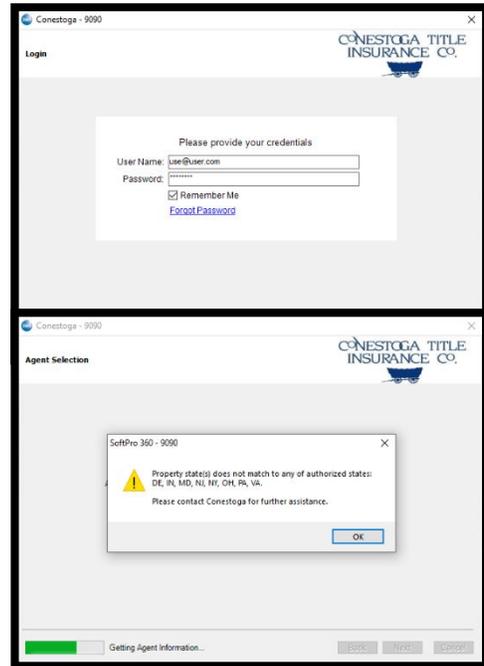


- The Welcome screen appears providing information on the Conestoga vendor. The **Skip Welcome Screen** checkbox will prevent the Welcome screen from being shown in the future when opening Conestoga.
- Click the **Cancel** button to exit the Conestoga process or **Next** to launch the Conestoga integration product.



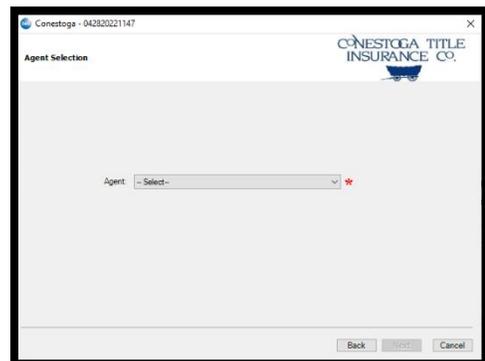
## Logging In to Conestoga

- The **Login** screen requires to enter a valid Conestoga username and password.
  - Check the **“Remember Me”** to login automatically when the Conestoga product in future sessions.
  - Click **Next** to enter to the Conestoga Integration.
- 
- If the SoftPro Order Property State does not match any of Conestoga’s authorized states, you will receive an error message.



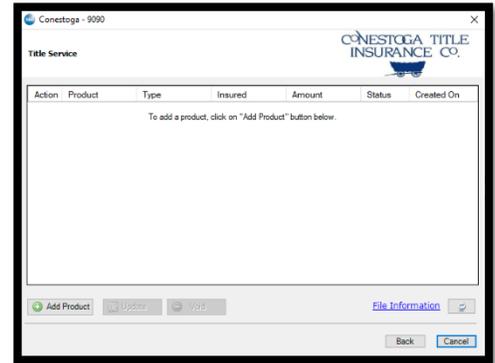
## Agent Selection Screen

- Select the appropriate Agent for this order. This is a required selection.
- If one Agent is returned, user will bypass this screen automatically.
- Click **Next** to launch Title Services Selection Screen.



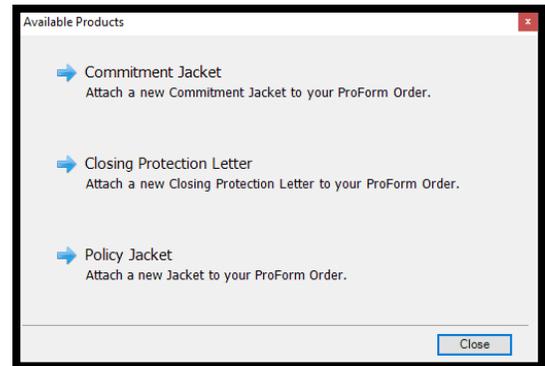
## Title Service Screen

- Select **Add Product** to order Commitment, Closing Protection Letter, or Policy Jacket.



## Product Selection Screen

- Select **Commitment Jacket** to generate a Commitment Jacket.
- Select **Closing Protection Letter** to navigate you to the **CPL Information** screen.
- Select **Policy Jacket** to navigate you to the **Jacket Selection** screen.

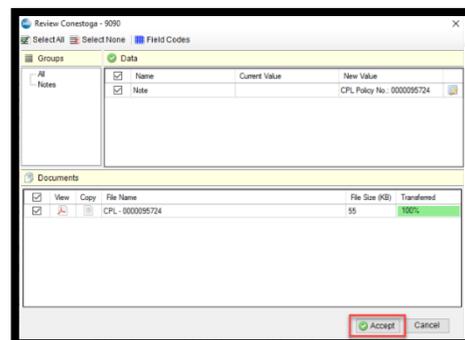


## Commitment Jacket Request

If Commitment Jacket was selected, a request is sent to Conestoga to generate and will return the Jacket for your acceptance. User will click on the paper icon under Action to be taken to the review screen to approve the document.



- Click **Accept** to import the data and documents into the corresponding order. You will be taken back to the Title Services screen and the status will be changed to **Completed**.



## Closing Protection Letter Request

If Closing Protection Letter was selected, the CPL Information screen will display with the following fields.

- CPL Coverage
  - Select the covered party of the CPL to send to Conestoga.
  - By default, lender is selected and non-editable.
- Branch
  - Select from a list of branches provided by Conestoga.
- Approved Attorney
  - Select from a list of Approved Attorney's provided by Conestoga.
- Click **Cancel** to exit the Form Detail Screen.
- Click **Next** to proceed to the Lender Information Screen.

## Lender Information Screen

This information populates based on the loan chosen in the loan drop down. The fields will pull from the ProForm order.

- Click **Submit** to send your request to Conestoga. Submit will be activated when all required fields have data.
- Click **Back** to return to the CPL Information Screen.

- Click **Accept** to import the data and documents into the corresponding order. You will be taken back to the Title Services screen and the status will be changed to **Completed**

Name	Current Value	New Value
Note		CPL Policy No.: 000095724

View	Copy	File Name	File Size (KB)	Transferred
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CPL - 000095724	55	100%

## Policy Jacket Request

If Policy Jacket was selected, the user is to select which type of Jacket is being requested from Conestoga.

- Jacket Type
  - Jacket Type Selection is required
- Add
  - Select the number of Jackets you would like to request for Each Jacket Type.
- Existing
  - This displays how many Jackets have been request from Conestoga.
- Click **Submit** to send your request to Conestoga. Submit will be activated when all required fields have data.
- Click **Back** to return to the Form Detail Screen.

Jacket Type	Add	Existing
Standard Owner's Jacket	0	0
Standard Loan Jacket	0	0
Standard Loan Policy	0	0
Standard Owner's Policy	0	0
Enhanced Owner's Policy	0	0
Enhanced Loan Policy	0	0
Short Form Loan Policy	0	0

## Policy Jacket Sending Request

You will see the sending request screen after submitting your Policy Jacket request to Conestoga.

## Reviewing the received product from Conestoga

When the status changes to Ready, user will click on the paper icon under Action to be taken to the review to approve the document and data, if any, writing back to the SoftPro Order.

- Click Accept to import the data and documents into the corresponding order.

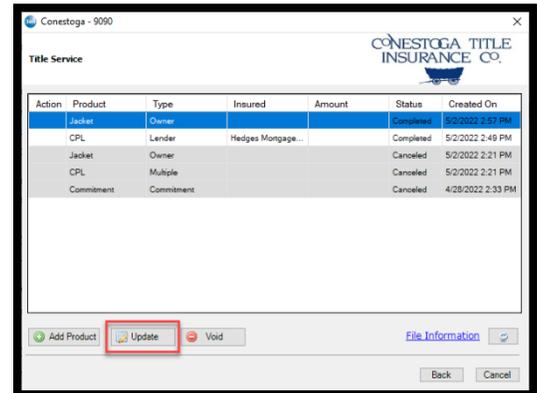
Name	Current Value	New Value
Note		CPL Policy No: 0000095724

View	Copy	File Name	File Size (KB)	Transferred
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CPL - 0000095724	55	100%

## Editing a CPL or Jacket

From the **Title Services** screen, you can edit a CPL or Jacket that you previously created from the Order.

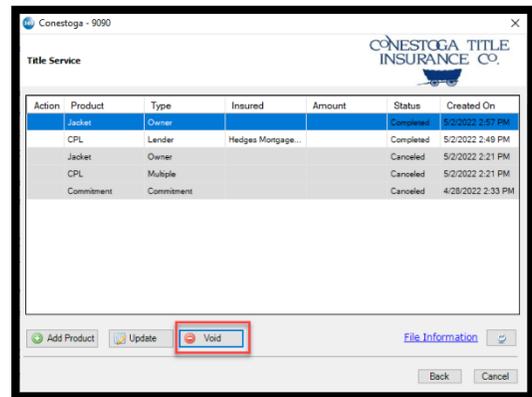
- Highlight the CPL/Jacket transaction from the list that you want to edit and click the **Update** button. You will then have the opportunity to update the data for the request.
- You can click **Submit** to generate the updated letter.



## Voiding a CPL or Jacket

From the **Title Services** screen, you can Void a CPL or Jacket that you previously created from the Order.

- Highlight the CPL/Jacket transaction from the list that you want to Void and click the **Void** button. You will have the opportunity to select a Void Reason for the request.
- You can click **Void** to send the Void to Conestoga.



- Click Yes, at the Are you sure want to Void jacket, if you want to proceed with the void.
- Click No, if you do not wish to voice the jacket and return to the Title Services Screen.

