

## Conestoga User Guide Standard or Enterprise Version

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Details

#### **History**

Date

#### 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.

Welcome	CONESTOGA TITLE INSURANCE CO.
There When It Matters Most Consetupati The Issurance Co. Its mod films a status, legal and instruction communities with from our emphasis on building relationships genet Estranetic Intergraded with SORPho 360 • Order OFLs to be generated and relative • Update or transport CPL is whon needed • Order policy jackets to be generated and on For assistance call 800-732-3555 or email: j	nost tusted names in the title insurance industry, providing real reliable title insurance since 1972. Conestopa's success comes through service, experience and financial security. Conestopa's eliminating the need to ne-key data already entered in SoftPro- into your SoftPro order stumed into your SoftPro order arrowets Reconstructific.com
Skip Welcome Page	Net Core

### 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.

Login		INSURANCE CO.
		Please provide your credentials
	User Name:	use@user.com
	Password:	
	1	Remember Me
		Forgot Password
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#### 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.

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 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**.

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Accept Ca

### **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 noneditable.
- 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



		CONESTOGA TITLE
ender miorinación	i screen	INDOM INCL. C
Loan :	Loan 1 V Loan Number : 1234567	
Lender Name :	Hedges Mortgage LLC	
Address 1 :	123 Main Street	
Address 2 :		
City :	Warren State : MI	Zip : 48035
Attention :		
Email :	LO@test.com	Email Lender
Buyer/Borrower :	Keith Kerney and Julie Cleaver	
Seller:	Seller Last and Seller Last1	

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#### **Policy Jacket Request**

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

- Jacket Type
  - o 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.

#### **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.

🚳 Review Conestoga	- 9090	0		×
Groups	Data	•		
All Notes	Name Note	Current Value	New Value CPL Policy No.: 00	100095724
Documents	1			
View Copy	File Name CPL - 0000095724		File Size (KB) 55	Transferred 100%
			C Accept	Cancel

CONESTOGA

5/2/2022 2:21 PM 5/2/2022 2:21 PM

4/28/2022 2:33 PI

Eile Information 🥥 Back Cancel

### 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.

itle Ser	vice				INSURA	NCE CO.
Action	Product	Туре	Insured	Amount	Status	Created On
	Jacket	Owner			Completed	5/2/2022 2:57 PI
	CPL	Lender	Hedges Mortgage		Completed	5/2/2022 2:49 P
	Jacket	Owner			Canceled	5/2/2022 2:21 P
	CPL	Multiple			Canceled	5/2/2022 2:21 P
	Commitment	Commitment			Canceled	4/28/2022 2:33
					Tile Inf	annation .

on Product

Add Product Detailed Update

Туре

#### 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.

