

# Doma Closing Protection Letter User Guide

---

November 2023

# Copyright and Licensing Information

Copyright © 1987–2024 by SoftPro, Raleigh, North Carolina.

No part of this publication may be reproduced in any form without prior written permission of SoftPro. For additional information, contact SoftPro, 4800 Falls of Neuse Road, Raleigh, NC 27609, or contact your authorized dealer.

Microsoft, Windows, and MS–DOS are registered trademarks of Microsoft Corporation in the United States and/or other countries. WordPerfect is a registered trademark of Corel Corporation. Crystal Reports is a registered trademark of SAP AG. HP LaserJet is a registered trademark of Hewlett Packard Development Company, L.P. GreatDocs is a registered trademark of Harland Financial Solutions Incorporated. RealEC Technologies, Inc. is majority owned by Lender Processing Services. All other brand and product names are trademarks or registered trademarks of their respective companies.

## IMPORTANT NOTICE – READ CAREFULLY

Use of this software and related materials is provided under the terms of the SoftPro Software License Agreement. By accepting the License, you acknowledge that the materials and programs furnished are the exclusive property of SoftPro. You do not become the owner of the program but have the right to use it only as outlined in the SoftPro Software License Agreement.

All SoftPro software products are designed to ASSIST in maintaining data and/or producing documents and reports based upon information provided by the user and logic, rules, and principles that are incorporated within the program(s). Accordingly, the documents and/or reports produced may or may not be valid, adequate, or sufficient under various circumstances at the time of production. UNDER NO CIRCUMSTANCES SHOULD ANY DOCUMENTS AND/OR REPORTS PRODUCED BE USED FOR ANY PURPOSE UNTIL THEY HAVE BEEN REVIEWED FOR VALIDITY, ADEQUACY AND SUFFICIENCY, AND REVISED WHERE APPROPRIATE, BY A COMPETENT PROFESSIONAL.

# Table of Contents

|   |    |
|---|----|
| Introduction .....                            | 4  |
| Accessing Doma .....                          | 5  |
| Select a ProForm Order for Title Search ..... | 5  |
| Welcome Screen .....                          | 6  |
| Logging into Doma .....                       | 6  |
| Agency/Underwriter Selection Screen.....      | 7  |
| Title Service Screen .....                    | 7  |
| File Information Screen .....                 | 8  |
| Available Products Screen.....                | 9  |
| Requesting a CPL.....                         | 10 |
| Covered Party Information Screens .....       | 10 |
| Lender Information Screen .....               | 11 |
| Buyer/Borrower Information Screen .....       | 11 |
| Seller Information Screen.....                | 12 |
| Reviewing Received Products from Doma .....   | 13 |
| Editing a CPL.....                            | 14 |
| Voiding a CPL.....                            | 14 |

## *Introduction*

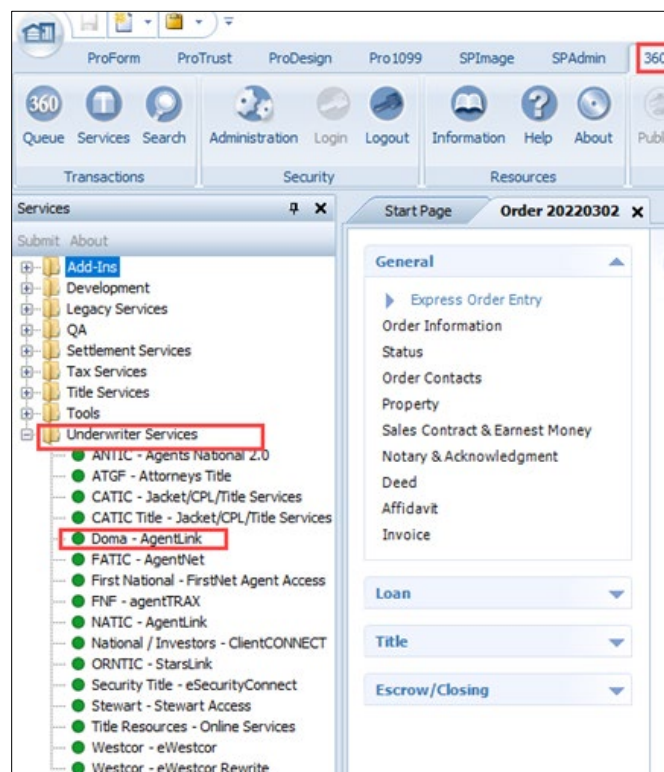
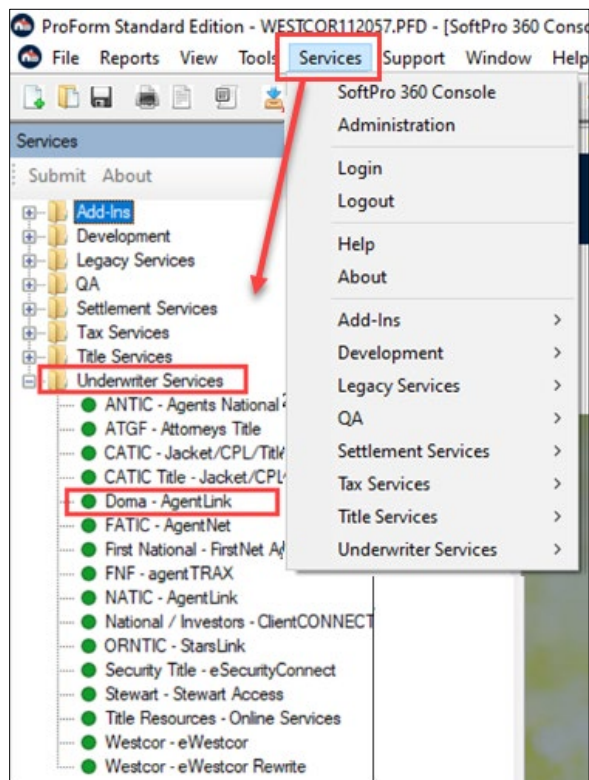
---

The Doma integration with SoftPro 360 allows ordering of Doma products using the data within ProForm. SoftPro 360 creates a Doma file corresponding to information in the ProForm order and enable ordering Policy Jackets along with CPLs through Doma. Additionally, users can update and void existing CPLs and Jackets. 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 Doma

From the **360** ribbon, click the **Services** button to open the **Services** tab.

1. Click the **Underwriter Services** folder to expand
2. Double-click the **Doma – AgentLink** entry



## Select a ProForm Order for Title Search

Each Search request must be linked to a ProForm Order. If a ProForm order is already open and active, the active order is automatically linked to the request. If no active order is open, enter the order number in the **Selected Order Number** field. Once the order is confirmed, click **OK**.

Order Linking

Open Order Numbers:

DomaSearch - Demo  
DomaSearch - Demo 2

Selected Order Number:

OK

Cancel

## Welcome Screen

After 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 Doma.

Click the **Next** button to continue.

## Logging into Doma

The Login screen requires a valid **User Name** and **Password**.

**NOTE:** If needed, use the **Need Help Logging In** link to send an email requesting assistance with login credentials.

Check the **Remember Me** check box to automatically log in when launching the product in future sessions.

Click the **Login** button to continue to the **Agency/Branch Selection** screen.

## Agency/Underwriter Selection Screen

Select the applicable,

- **Agency Name** for this order
- **Branch** for this order
- **Underwriter** for this order

All are required fields and once selected, the Next button is enabled.

Click the **Back** button to return to the log in screen or **Next** to launch **Title Services** screen



## Title Service Screen

From the **Title Services** screen, the following features are available:

- View a list of the CPLs that have been ordered
- Order a CPL
- Update an issued product
- Void an issued product
- View order data that has been sent to Doma

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

**Action:**

- **Review**  button: 360 has received the CPL from Doma (**Status = Ready**) and it is ready for the user to review and accept. Clicking the **Review** button displays the **Review** screen, where the user can review and accept the product.
- **Red Exclamation**  icon: The request submitted to Doma 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 Doma. For CPLs, the value will always be **Closing Protection Letter**.

**Type:** Displays the type of product ordered. If CPL is requested, it will display the covered party (Lender, Buyer/Borrower, or Seller).

**Insured:** Insured party

**Amount:** Liability amount is shown for the policy jackets only.

**Status:**

- **Ready:** 360 has received the remitted document from Doma 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 table data can be sorted by clicking the column heading. Click once to sort in ascending order, click again to sort in descending order.

The **Add Product** button is available to order a CPL

To **update** an issued product, highlight a transaction that is in **Completed** status and click the **Update** button.

To **cancel** an issued product, highlight a transaction that is in **Completed** status and click the **Void** button.

To view the order data being sent to Doma, click the **File Information** link.

## File Information Screen

The **File Information** screen displays populating the Agency Name, Branch, and Underwriter selected on the **Agency/Underwriter Selection** screen. These fields are **not** editable.



The user must select the

- **Transaction Type** (required selection)
- **Property Type** (required selection)
- **Property Address**
  - Defaults to the first address listed in the ProForm order.
  - **Address 1, Address 2, City, State, and Zip** populate with the **Property Address** selection for review.
- **County** (required selection)

The screenshot shows a web application window titled 'Doma - 20220302'. The 'File Information' section contains the following fields:

- Agency Name: States Title Agency, Inc.
- Branch: Arizona Sales Artemis
- Underwriter: North American Title Insurance Company
- Transaction Type: -- Select -- (marked with a red asterisk)
- Property Type: -- Select -- (marked with a red asterisk)
- Property Address: 155 W Johnston St, Rock hill, NC, 29730
- Address 1: 155 W Johnston St
- Address 2: (empty)
- County: -- Select -- (marked with a red asterisk)
- City: Rock hill
- State: NC
- Zip: 29730-\_\_\_\_

At the bottom right, there are 'Save' and 'Cancel' buttons. The 'Save' button is highlighted with a red box.

Click the **Save** button to send this information to Doma or the **Cancel** button to return to the **File Information** screen without submitting.

## Available Products Screen

- Select **Closing Protection Letter** to navigate you to the **CPL Information** screen.
- Click the **Close** button to continue

The screenshot shows a window titled 'Available Products'. It contains two main options, each with a blue arrow icon:

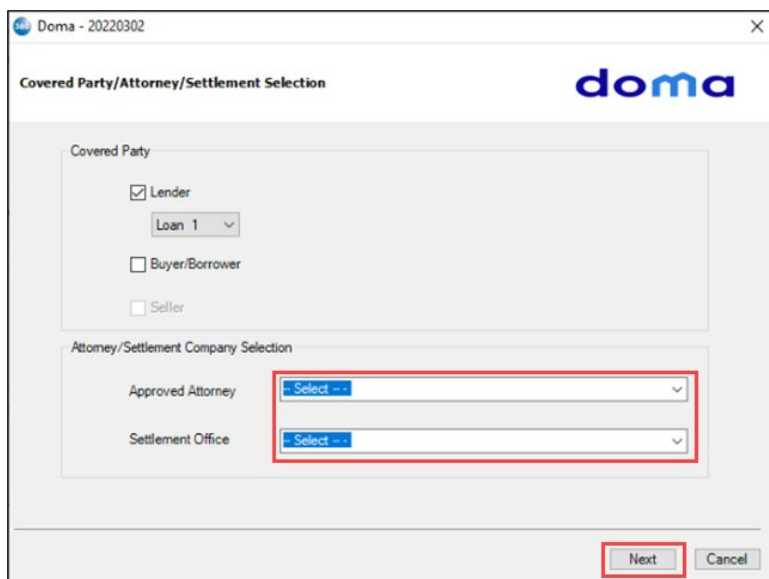
- Closing Protection Letter**  
Attach a new Closing Protection Letter to your ProForm Order.
- Policy Jacket**  
Attach a new Jacket to your ProForm Order.

At the bottom right, there is a 'Close' button, which is highlighted with a red box.

## Requesting a CPL

When the **Closing Protection Letter** is selected, the **Covered Party/Attorney/Settlement Selection** screen opens. From this screen the user must select the,

- **Covered Party** – check the corresponding check box for the covered party of the CPL to send to Doma; by default, **Lender** is selected.
- **Loan** drop-down – by default, the first loan in the order is selected.
- **Approved Attorney** – lists Approved Attorneys returned from Doma, if applicable.
- **Settlement Office** – lists Settlement Offices returned from Doma, if applicable.



Click **Next** to enter information for the Covered Party selected here or click **Cancel** to exit the CPL screen.

## Covered Party Information Screens

The Covered Party Information screen opens depending upon the selection made on the prior screen Covered Party/Attorney/Settlement Selection screen: Lender, Buyer/Borrower or Seller for further inputs.

The information for the Covered Party populates with the data entered in the ProForm order. Each screen allows the user to enter additional notes to be submitted with the request.

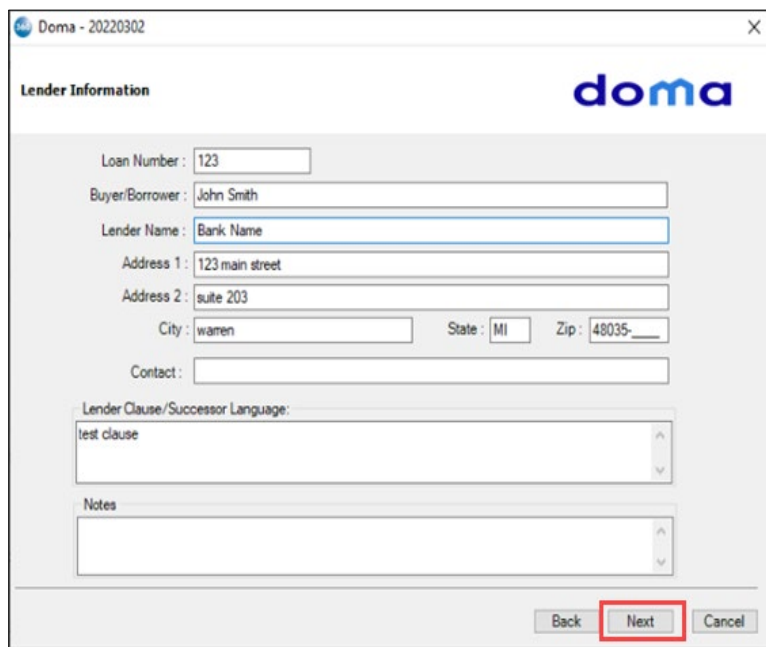
**NOTE:** If information is changed on the Information Screens, it does **NOT** write back to the ProForm order.

## Lender Information Screen

If **Lender** was selected as a covered party, the Lender Information screen opens with information populated based on the loan chosen on the **Covered Party/Attorney/Settlement Selection** screen.

The following fields pull data from the ProForm order.

- **Loan Number**
- **Buyer/Borrower** – this displays all buyer/borrower names concatenated with an “and” (i.e., John Smith and Suzy Smith)
- **Lender name** (required field)
- **Address 1**(required field)
- **Address 2**
- **City** (required field)
- **State** (required field)
- **Zip** (required field)
- **Lender Clause/Successor Language** – pulls from the Lender Contact screen
- **Notes** field is an optional field where the user can enter notes to send with the request to Doma



Click the **Next** button to send the data to Doma, click the **Back** button to return to the **Covered Party/Attorney/Settlement Selection** screen or **Cancel** button to return to the **Title Services** screen.

## Buyer/Borrower Information Screen

If the Buyer/Borrower is selected as a covered party, the Buyer/Borrower Information screen opens with information populated from the ProForm order.

- **Buyer/Borrower** displays all buyer/borrowers entered in the order.
- **Name** (required field)
- **Address 1** (required field)
- **Address 2**
- **City** (required field)
- **State** (required field)
- **Zip** (required field)
- **Notes** field is an optional field where the user can enter notes to send with the request to Doma

Doma - 20220302

**Buyer/Borrower Information**

Buyer/Borrower: Buyer

Name: John Smith

Address 1: 155 W Johnston St

Address 2:

City: Rock hill State: NC Zip: 29730-

Notes

Back Submit Cancel

Click the **Next** button to send the data to Doma, click the **Back** button to return to the **Covered Party/Attorney/Settlement Selection** screen or **Cancel** button to return to the **Title Services** screen.

## Seller Information Screen

If Seller was selected as a covered party, The Seller Information screen will display. The following fields will pull from the ProForm order.

- Seller drop-down displays all buyer/borrowers entered in the order.
- **Name** (required field)
- **Address 1** (required field)
- **Address 2**
- **City** (required field)
- **State** (required field)
- **Zip** (required field)
- **Notes** field is an optional field where the user can enter notes to send with the request to Doma

Doma - MC-Mismo-Test

**Seller Information**

Seller: Seller

Name: Seller Last

Address 1: 90 W broad st

Address 2:

City: columbus State: OH Zip: 43215-


Notes

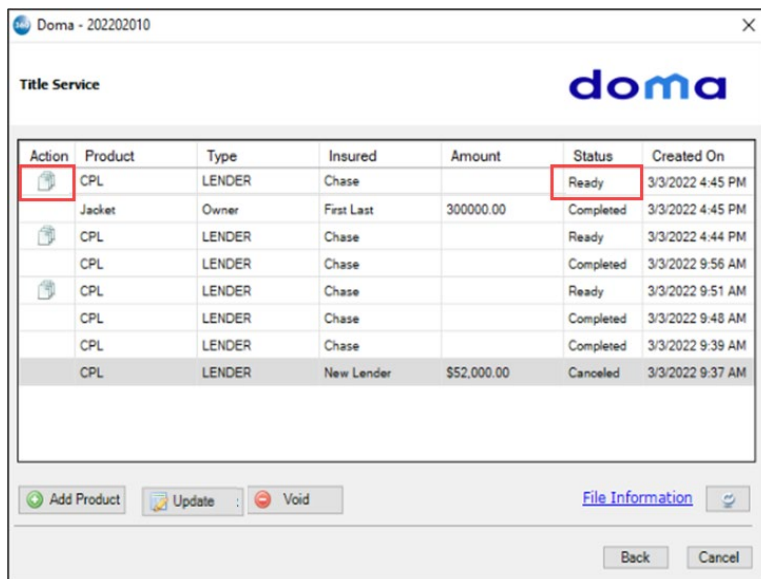
Back Submit Cancel




Click the **Next** button to send the data to Doma, click the **Back** button to return to the **Covered Party/Attorney/Settlement Selection** screen or **Cancel** button to return to the **Title Services** screen.

## Reviewing Received Products from Doma

The **Title Services** screen provides a list of the products that have been ordered to include those that are ready for review and acceptance into the ProForm order (**Status = Ready**).

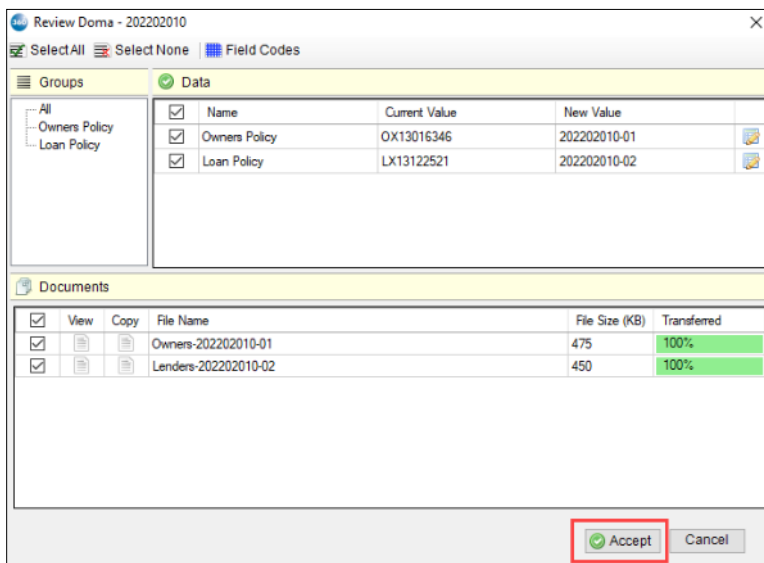
Open the **Review** screen by clicking the **Action**  icon for the corresponding entry.



| Action  | Product | Type   | Insured    | Amount      | Status    | Created On       |
|---|---------|--------|------------|-------------|-----------|------------------|
|  | CPL     | LENDER | Chase      |             | Ready     | 3/3/2022 4:45 PM |
|   | Jacket  | Owner  | First Last | 300000.00   | Completed | 3/3/2022 4:45 PM |
|  | CPL     | LENDER | Chase      |             | Ready     | 3/3/2022 4:44 PM |
|   | CPL     | LENDER | Chase      |             | Completed | 3/3/2022 9:56 AM |
|  | CPL     | LENDER | Chase      |             | Ready     | 3/3/2022 9:51 AM |
|   | CPL     | LENDER | Chase      |             | Completed | 3/3/2022 9:48 AM |
|   | CPL     | LENDER | Chase      |             | Completed | 3/3/2022 9:39 AM |
|   | CPL     | LENDER | New Lender | \$52,000.00 | Canceled  | 3/3/2022 9:37 AM |

Buttons: Add Product, Update, Void, File Information, Back, Cancel

To approve the document and data, if any, writing back to the ProForm order, click **Accept** to import the data and documents into the corresponding order.







Select All | Select None | Field Codes

Groups: All, Owners Policy, Loan Policy

Data

|                                     | Name          | Current Value | New Value    |
|-------------------------------------|---------------|---------------|--------------|
| <input checked="" type="checkbox"/> | Owners Policy | OX13016346    | 202202010-01 |
| <input checked="" type="checkbox"/> | Loan Policy   | LX13122521    | 202202010-02 |

Documents

|                                     | View  | Copy  | File Name            | File Size (KB) | Transferred |
|-------------------------------------|---|---|----------------------|----------------|-------------|
| <input checked="" type="checkbox"/> |  |  | Owners-202202010-01  | 475            | 100%        |
| <input checked="" type="checkbox"/> |  |  | Lenders-202202010-02 | 450            | 100%        |

Buttons: Accept, Cancel

## Editing a CPL

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

- Highlight the CPL transaction you wish to edit.
- Click the **Update** button. You then have the opportunity to update the data for the request.
- Click **Submit** to generate the updated letter.

The screenshot shows the 'Doma - 202202010' window with the 'Title Service' tab. It contains a table with the following data:

| Action | Product | Type   | Insured    | Amount      | Status    | Created On       |
|--------|---------|--------|------------|-------------|-----------|------------------|
| Jacket | Jacket  | Lender | Chase      | 250000.00   | Ready     | 3/3/2022 4:45 PM |
| Jacket | Jacket  | Owner  | First Last | 300000.00   | Completed | 3/3/2022 4:45 PM |
| CPL    | CPL     | LENDER | Chase      |             | Ready     | 3/3/2022 4:44 PM |
| CPL    | CPL     | LENDER | Chase      |             | Completed | 3/3/2022 9:56 AM |
| CPL    | CPL     | LENDER | Chase      |             | Ready     | 3/3/2022 9:51 AM |
| CPL    | CPL     | LENDER | Chase      |             | Completed | 3/3/2022 9:48 AM |
| CPL    | CPL     | LENDER | Chase      |             | Completed | 3/3/2022 9:39 AM |
| CPL    | CPL     | LENDER | New Lender | \$52,000.00 | Canceled  | 3/3/2022 9:37 AM |
| CPL    | CPL     | LENDER | Chase      |             | Completed | 3/3/2022 9:34 AM |

Below the table are buttons: 'Add Product', 'Update' (highlighted with a red box), and 'Void'. There is also a 'File Information' link and 'Back' and 'Cancel' buttons at the bottom right.

## Voiding a CPL

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

- Highlight the CPL transaction you wish to void.
- Click the **Void** button

This screenshot is identical to the one above, showing the 'Doma - 202202010' window with the 'Title Service' tab and the same table of transactions. In this view, the 'Void' button is highlighted with a red box, while the 'Update' button is no longer highlighted.

- Select a **Void Reason** for the request (required).
- Click **Void** to send the request to Doma.

The screenshot shows a web application window titled "Doma - 202202010". The window has a "Void" label in the top left and the "doma" logo in the top right. The main content area contains the following fields:

- Product Name: CPL - LENDER
- Covered Party: Chase
- Date: 3/3/2022
- Void Reason: A dropdown menu is open, showing the following options:
  - Select --
  - Transaction Cancelled
  - Changed Underwriter
  - Changed Lender
  - Issued on Wrong File
  - Other

At the bottom right of the form, there are two buttons: "Void" and "Cancel". The "Void" button is highlighted.