

First National Title User Guide

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History

Date	Details
2/21/2017	Initial User Guide
2/22/2022	Updated CPL Information

Introduction

The First National Title integration with SoftPro 360 allows seamless ordering of First National Title products within ProForm. In this version, SoftPro 360 will create a First National Title file corresponding to a ProForm Order and enable the ordering CPLs and Policy Jackets through First National Title, as well as edit/void those that have been created through the Order. This is accomplished without leaving the SoftPro workspace, helping to facilitate a more efficient workflow by reducing or eliminating the duplication of data entry.

Benefits/Features

Users will be able to perform the following:

Closing Protection Letter (CPL)

- Request a CPL through First National directly from a ProForm Order
- View the contents of a CPL
- Copy the contents of a CPL to a clipboard
- Accept and attach a CPL to a ProForm Order
- Edit a CPL created from a ProForm Order

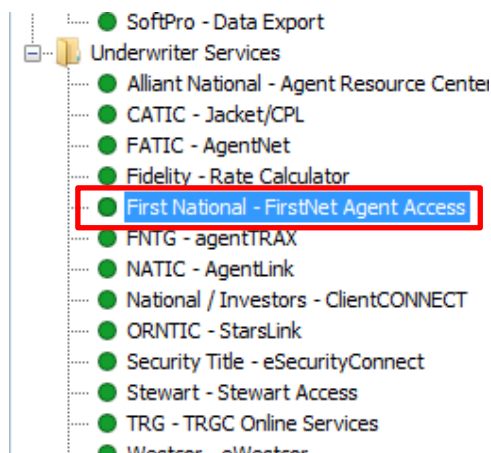
Policy Jackets

- Request a Policy Jacket through First National Title directly from a ProForm Order
- View the contents of a Jacket
- Accept and attach a Policy Jacket to a ProForm Order
- Void a Policy Jacket created from a ProForm Order

Launching First National Title

Access from the 360 Services Menu

From the **360 - Services Menu**, double-click **First National – FirstNet Agent Access** located under the **Underwriter Services** folder. This will open the **Order Linking** screen:

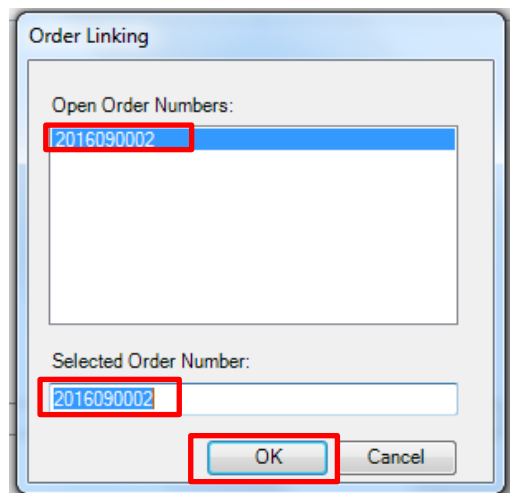


Select a ProForm Order for Your Search

From the **Order Linking** screen, specify the Order which requires a service:

All the Orders that are currently opened in the 360 session will be listed in the **Open Order Numbers** pane. The **Selected Order Number** field will automatically populate with the currently active ProForm Order.

- Selecting an Order from the list will automatically display in the **Selected Order Number** field or manually enter the desired Order number.
- Click **OK** button to navigate to the **Welcome** screen.

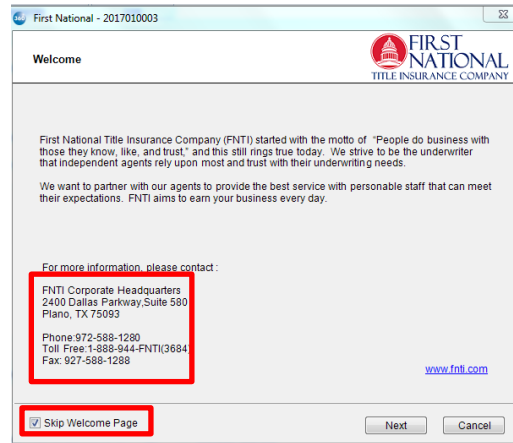


Welcome Screen

The **Welcome** screen provides a summary of the product & First National Title's contact information:

Click **Next** to navigate to the **Login** screen.

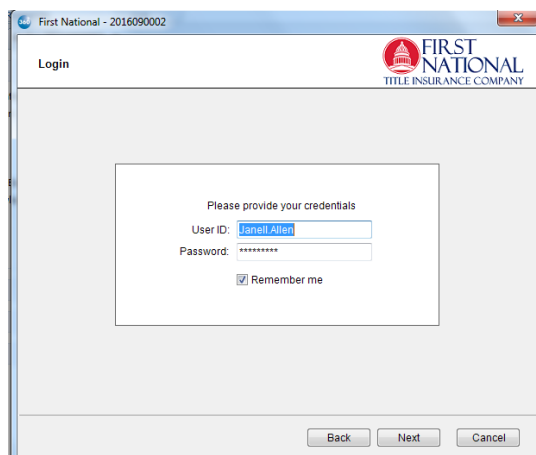
Click the **Skip Welcome Screen** checkbox to bypass for future sessions.



Login Screen

The **Login** screen requires a **User ID** and **Password** that has been provided by First National Title. The **Remember me** check box will bypass this screen and automatically log in the next time the product is launched.



- Click **Next** to continue to the **Title Services** screen.
- **Back** button will go back to previous screen; this action is standard across all the screens in the Integration.
- **Cancel** button will close the Product; this action is standard across all the screens in the integration.

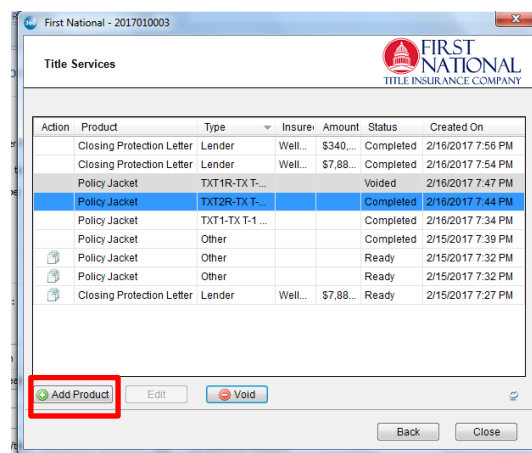


Submitting a CPL Request

Title Services Screen

The **Title Services** screen displays a table that lists all the CPLs and Policy Jackets that have been generated for an Order along with the following information (column headings) for each CPL or Policy Jackets:

- **Action:**
 - **Paper Icon** : The CPL/Jackets have not been attached to the Order (**Status = Ready**). Clicking the icon will navigate you to the **Review Letter** screen where you will be able to complete this action.
 - **Red Question Mark** : The CPL/Jacket request encountered an error, and no CPL/Jackets was created. You can hover over the question mark or double-click it to view a description of the error.
 - **No icon displayed**: CPL/Jackets has been voided (**Status = Voided**) or CPL/Jackets has been attached to the Order (**Status = Completed**).
- **Product**: The type of product requested from First National Title. The value will be **Closing Protection Letter** or **Policy Jacket**.
- **Type**: The type of CPL that was generated (i.e. **Lender**) Or The Type of Policy Jacket generated (i.e. **TXT2R-TX T-2R Short Form Residential Loan Policy**)
- **Insured**: The name of the individual or entity covered by the CPL.
- **Amount**:
 - For a Lender CPL, this value is the loan amount.
 - For a Jacket, the value will be Coverage Amount.
- **Status**:
 - **Ready**: The CPL or Jacket was generated but has not been attached to the Order.
 - **Completed**: The CPL or Jacket was generated and attached to the Order.
 - **Rejected**: An error occurred with the CPL or Jacket submission.
 - **Voided**: The CPL or Jacket was canceled/voided.
- **Created On**: Date and time stamp of when the CPL or Jacket was generated.



Action	Product	Type	Insured	Amount	Status	Created On
	Closing Protection Letter	Lender	Well...	\$340...	Completed	2/16/2017 7:56 PM
	Closing Protection Letter	Lender	Well...	\$7.88...	Completed	2/16/2017 7:54 PM
	Policy Jacket	TXT1R-TX T...			Voided	2/16/2017 7:47 PM
	Policy Jacket	TXT2R-TX T...			Completed	2/16/2017 7:44 PM
	Policy Jacket	TXT1-TX T-1 ...			Completed	2/16/2017 7:34 PM
	Policy Jacket	Other			Completed	2/15/2017 7:39 PM
	Policy Jacket	Other			Ready	2/15/2017 7:32 PM
	Policy Jacket	Other			Ready	2/15/2017 7:32 PM
	Closing Protection Letter	Lender	Well...	\$7.88...	Ready	2/15/2017 7:27 PM

To **sort** the data in the table by columns, click on a column heading (except for the **Action** header). Click once to sort in ascending order and again to sort in descending order.

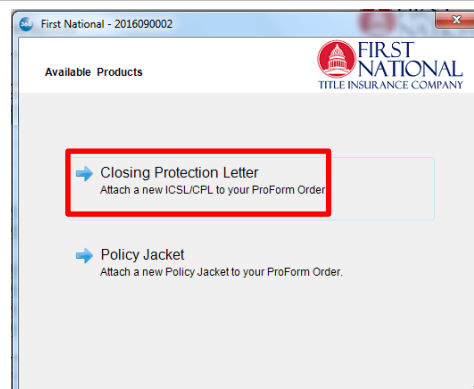
To **Edit** a CPL, Select the CPL transaction from Title Services screen and click **Edit**. This will allow you to **edit** the selected CPL.

To **Void** a Jacket, Select the **Policy Jacket** from Title Services screen and click **Void**. This will display a confirmation message to void the jacket, click **Ok** to void the Jacket.

To **order** a CPL or Jacket, click the **Add Product** button to navigate to the **Available Products** screen.

Available Products

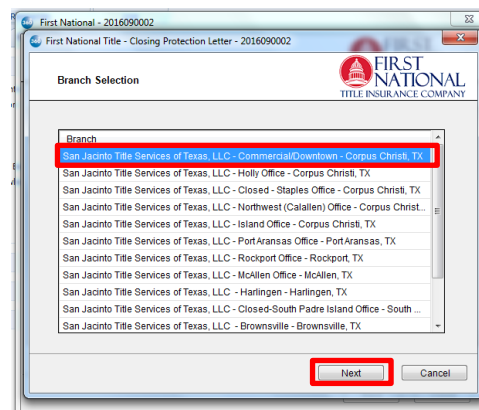
Click on **Closing Protection Letter** option to proceed to Branch Selection screen.



Selecting Branch

The **Branch Selection** screen lists all the branch offices assigned by First National Title and those which have the capability to issue a CPL:

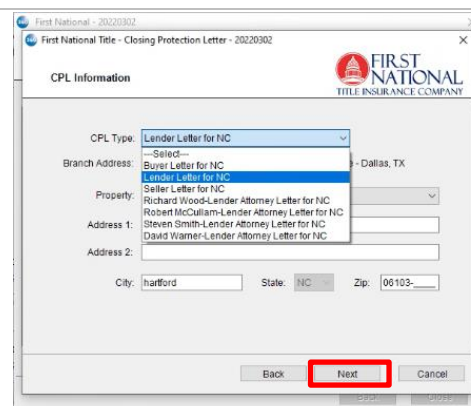
- Select a Branch by clicking the desired Branch address in the list. Click **Next** to continue to the **CPL Information** screen.
- If only one Branch office is available, that Branch will be selected automatically, and the application will bring you directly to the **CPL Information** screen.
- Click **Next** to continue to CPL Information screen.



Adding CPL Information

Information needed to request all CPL types permitted by that state can be entered on the **CPL Information** screen. If the account is associated with an approved attorney, the list of attorney letters will be available in the CPL Type drop-down list.

- The **CPL Type** is a drop down and will be defaulted to **Lender letter**, but can be changed as needed.



- The selected **Branch** displays below the **CPL Type** as read-only text. (You can use the back button to update the Branch, if needed)
- The **Property** field will display the property address in the ProForm Order. If there are multiple properties, the first one listed in the order will be selected and displayed by default. The drop-down will include the other properties in the order as options that can be selected. Note: If the order contained addresses for multiple states, the property list will be filtered based on the state of CPL Type selection.
- The selected **Property** will display in the fields below and can be edited. The property state field is not editable.
- Only 1 letter can be created at a time. If both a Lender and Buyer letter is needed, for instance, request the first one and then add the next CPL.
- Click **Next** to continue to the covered party details.

Creating a Lender CPL

Information needed to request the **Lender CPL** can be entered on the **Lender Information** screen.

- If the ProForm Order has multiple loans, the **Loan** field will reference each one by number. The first loan listed in the Order will correspond to **1** in the drop down; the second to **2**; the third to **3**, etc.
 - The information displayed in the other fields on this screen will change to correspond to the loan number you've selected in the **Loan** field.
- The following fields will display the corresponding values from the ProForm Order. These fields can be edited on the screen:
 - **Loan Number**
 - **Loan Amount**
 - **Buyer/Borrower**
 - **Lender Name**
 - **Address 1**
 - **Address 2**
 - **City**
 - **State**
 - **Zip**
 - **Lender Clause**

The screenshot shows the 'Lender Information' window. At the top, it says 'First National Title - Closing Protection Letter - 20220302'. The 'Lender Information' section includes the following fields: Loan (dropdown with '1'), Loan Number (text box with '123'), Loan Amount (text box with '\$375,000.00'), Buyer / Borrower (text box with 'Derek Ball'), Lender Name (text box with 'Bank of America'), Address 1 (text box with '123 main street'), Address 2 (text box with 'suite 203'), City (text box with 'warren'), State (dropdown with 'MI'), Zip (text box with '48035'), Phone (text box with '() - - - - -'), Fax (text box with '() - - - - -'), Email (text box), Attention (text box), and Lender Clause (dropdown with 'Selected'). At the bottom, there are 'Back', 'Submit', and 'Cancel' buttons.

Creating a Buyer or Seller CPL

Information needed to request a **Buyer and Seller CPL** can be entered on the **Buyer and Seller Information** screen.



- The following fields will display the corresponding values from the ProForm Order. These fields can be edited on the screen:
 - **Insured Name**
 - **Address 1**
 - **Address 2**
 - **City**
 - **State**
 - **Zip**
 - **Phone**
 - **Email**
- Click **Submit** to send the Order request to First National Title. Once successful, navigate to the **Review Letter** screen.

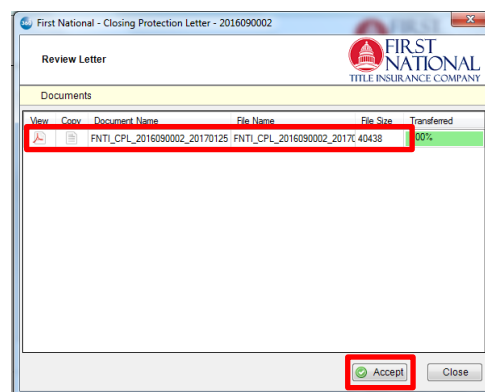
Creating an Attorney CPL

To create an attorney letter, simply select the attorneys name from the **CPL Type** drop-down. The Attorney details will not be visible, but the information will appear on the letter once generated. Add the lender information as indicated in the lender letter section of the user guide. If an attorney is not found in the list, contact First National Title support to have the profile configured.

Reviewing the Requested CPL

After the data is sent to First National Title and if the submission is successful, the **Review Letter** screen will appear which grants access the CPL that was created.

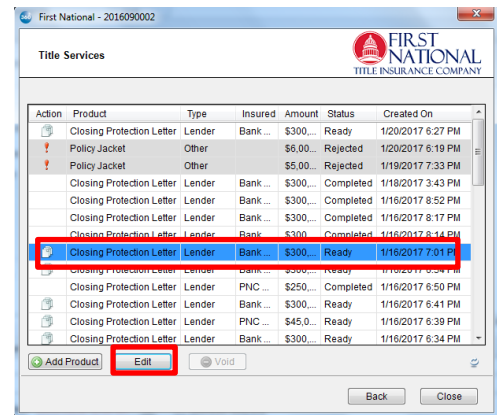
- To view the CPL, click the **PDF icon**  in the **View** column.
- To copy the contents of the document to the clipboard, click the **document icon**  in the **Copy** column.
- The CPL will have the same **Document Name** and **File Name**. The components of the name are formatted and will display as follows:
 - FNTI_CPL_{Order Name}_{YYYYMMDD}
 - Example: **FNTI_CPL_FirstOrder22_20160602**
- The **Review Letter** screen also displays the **File Size** and the percent of the file that was **transferred** from First National Title.
- Click **Accept** to attach the CPL to the ProForm Order. Once accepted, on the **Title Services** screen, the CPL will have a status of **Completed**.
- If **Close** is selected without attaching the ProForm Order, on the **Title Services** screen, the CPL will have a status of **Ready**.
- View the attached CPLs in the ProForm Order under the **Attachments** section of your **Order**.



Editing a CPL

Edit a CPL that was previously created in the **Title Services** screen.

- Highlight the CPL transaction from the list and click the **Edit** button. On click of Edit button, **CPL Information** screen will appear to make any edits. The CPL type is not editable. If this action is required, the existing CPL needs to be **Voided** and a new CPL will need to be created. If the branch must be changed for this CPL, click the **“Back”** button.
- Click the Next button to continue to the information screen for the covered party of that CPL to make edits. Click **Submit** to generate the updated letter.



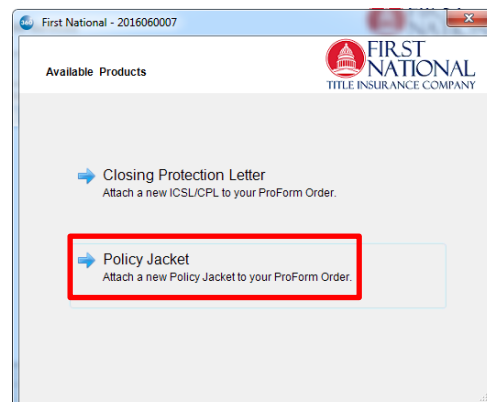
The screenshot shows the 'Lender Information' form with the following fields:

- Loan: 0
- Loan Number: []
- Loan Amount: \$1,231.00
- Buyer / Borrower: FBuyer Last
- Lender Name: name
- Address 1: 123 mains tree
- Address 2: []
- City: warren
- State: ID
- Zip: 48035-
- Phone: () -
- Fax: () -
- Email: []
- Attention: []
- Lender Clause: --Select--

The 'Submit' button at the bottom is highlighted with a red box.

Submitting a Jacket Request

To order a Jacket, click on the **Add Product** icon at the bottom left of the Title Services Screen, this will launch the **Available Products**. You can click on **Policy Jacket** icon to start ordering the Jacket.

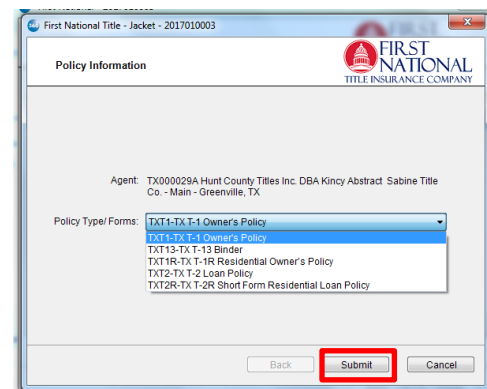


Policy Jacket Information

The **Policy Jacket Information** screen appears when the Policy Jacket option from Available Products screen is selected. The **Agent information** will be displayed on top as read only text. Select the required **Policy Type/Forms** from the dropdown and click **Submit** to order the Policy Jacket.



The **Policy Jacket Information** displays the information below.

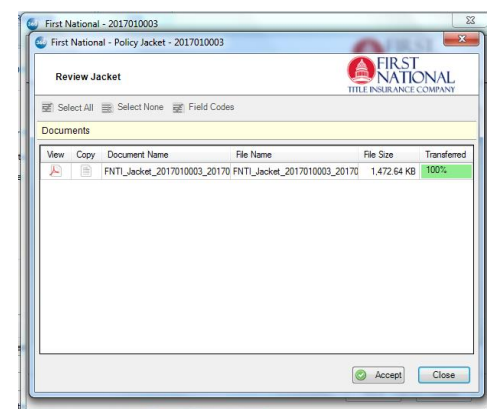
- The **Agent** Information on top as read only text.
- The **Policy Type/Forms** allows you to select the Policy Type.



Reviewing the Requested Jacket

After the data is sent to First National Title and if the submission is successful, the **Review Jacket** screen will appear which grants access the Jacket that was created.

- To view the Jacket, click the **PDF icon**  in the **View** column.
- To copy the contents of the document to the clipboard, click the **document icon**  in the **Copy** column.
- The Jacket will have the same **Document Name** and **File Name**. The components of the name are formatted and will display as follows:
 - FNTI_Jacket_{Order Name}_{YYYYMMDD}



Example: **FNTI_Jacket_FirstOrder22_20160602**

- The **Review Jacket** screen also displays the **File Size** and the percent of the file that was **transferred** from First National Title.
- Click **Accept** to attach the Jacket to the ProForm Order. Once accepted, on the **Title Services** screen, the Jacket will have a status of **Completed**.
- If **Close** is selected without attaching the ProForm Order, on the **Title Services** screen, the Jacket will have a status of **Ready**.
- View the attached Jackets in the ProForm Order under the **Attachments** section of the **Order**.

Reviewing the Jacket when only Policy Number is returned

In some cases (e.g., **short form Policy**) First National Title does not return the PDF and returns only the Policy Number to SoftPro, in such cases the Policy Number will be written to ProForm's Order Notes. **The Review Jacket** Screen shall be displayed like below.

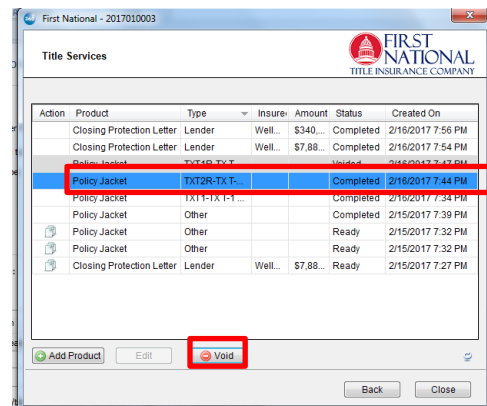
- On Click of **Accept**, the Order Number will be written to the ProForm's Order Notes.

Notes (2)				
		Created	Last Modified	Note
		02/16/2017 09:13 PM	Kiran malika	First National - New Order Accepted Policy Number: TXT2R-9899409 2/16/2017 10:27:43 AM
		02/16/2017 07:46 PM	Kiran malika	First National - New Order Accepted Policy Number: TXT2R-9899411 2/16/2017 9:14:22 AM

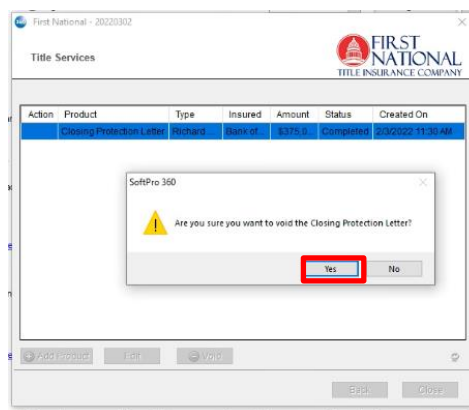
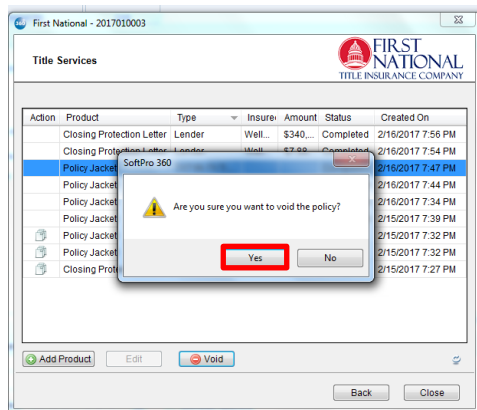
Voiding a Policy or CPL

A previously created Jacket or a CPL can be voided from the **Title Services** screen.

- To **Void** the Jacket or CPL that are in the state of **Ready** or **Completed**. Highlight the Jacket or CPL from the list and click on the **Void** button.



Once complete, a confirmation message is displayed in Title Services screen for Jackets or CPL. The option of **Yes** will **Void** the Policy Jacket or CPL, and on the Title Services screen, the Jacket or CPL transaction will be greyed out and the **Status** will change to **Voided**. Access is no longer available for this Jacket or CPL.



Note: Users belonging to same branch shall be able to **Void** the Jacket or CPL created by another user.

