SOFTPRO **360**

General Title Insurance Company
Closing Protection User Guide

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Introduction

The General Title integration with SoftPro 360 will allow ordering of General Title products using the data within ProForm. SoftPro 360 will be able to create a General Title file corresponding to information in the ProForm order and enable ordering Policy Jackets along with CPLs through General Title. Additionally, users can update and void existing CPLs and Jacket. 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 General Title Insurance Company

From the Select toolbar:

1. Select the Services tab.
2. Click the Underwriter Services folder to expand.
3. Double-click **General Title Inc.**
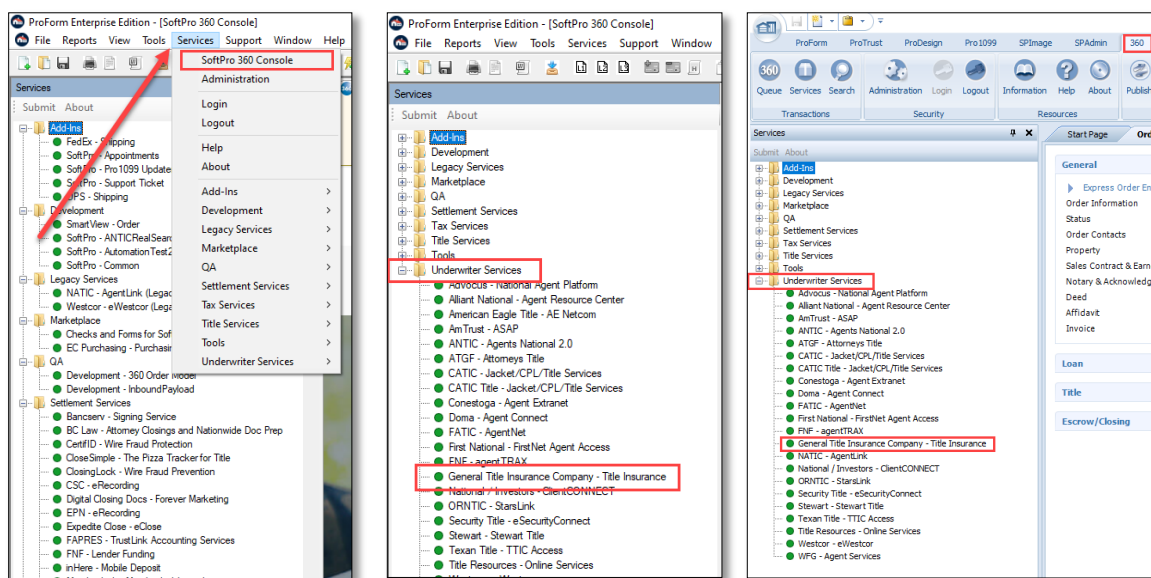
- The Welcome screen appears providing information on the General Title Integration.
- The **Skip Welcome Screen** checkbox will prevent the Welcome screen from being shown in the future when opening General Title.
- Click the **Cancel** button to exit the General Title process.
- Click the **Next** to launch the General Title integration.
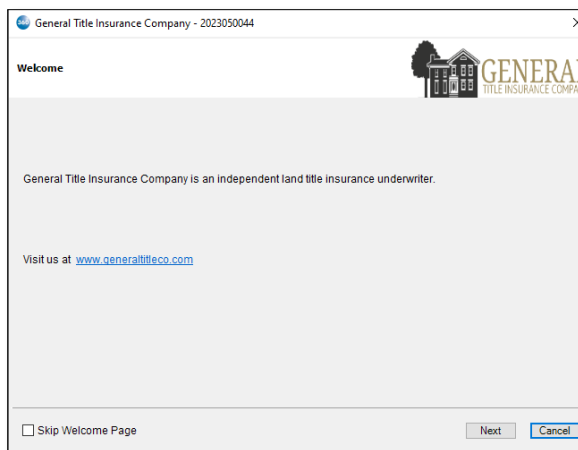
Logging into General Title

- The **Login** screen requires to enter a valid General Title username and password.
- Check the **"Remember Me"** to login automatically when the General Title product launches in future sessions.
- Click **Login** to enter to the General Title Integration.
- Click **Back** to return to the **Welcome** Screen.
- Click **Cancel** to exit the General Title Integration.
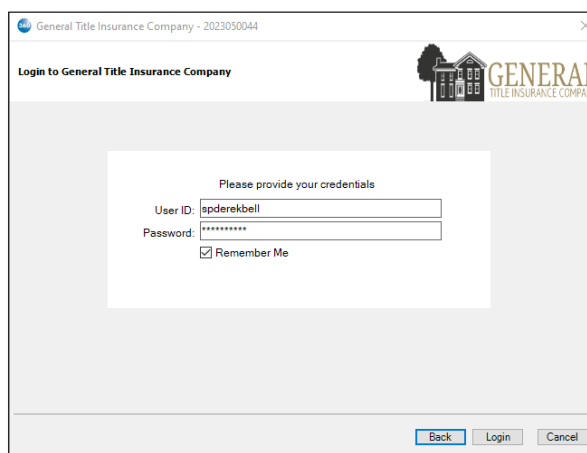
Validate Mandatory ProForm Data Screen

- The Validate Mandatory ProForm Data screen will display of the property states of the ProForm Order to not match any returned from General Title for the logged in user.
- Click the **Cancel** button to exit the General Title process.
- Click the **Back** button to return to the **Login** Screen.
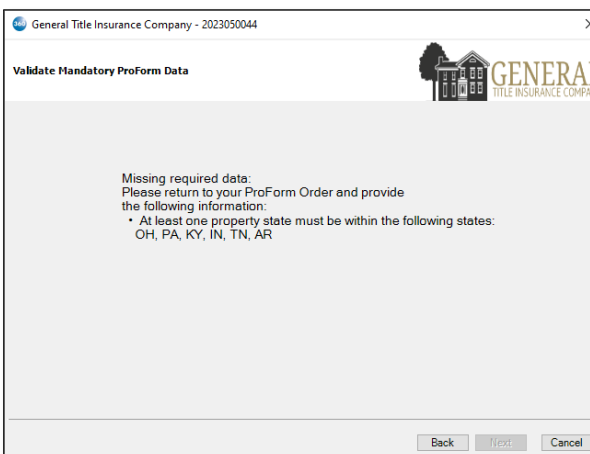
Summary Screen

From the **Summary** screen, the following features are available:

- View a list of the CPLs that have been ordered.
- Order a CPL.
- Void and issued product.
- View order data that has been sent to General Title.
- A table will display the products ordered from General Title and will provide the following information for each CPL:

  Action:
  - ✅ Review : 360 has received the CPL from General Title (**Status = *Ready***) and it is ready for the user to review and accept. Clicking the icon will display the **Review** screen, available options are review and accept the product.
  - **Red Exclamation Mark:** The request submitted to General Title 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 General Title. 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 will appear for the policy jackets only.
  Status:
  - ***Ready***: 360 has received the remitted document from General Title 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.
- To **sort** the data, click on a column heading. Click once to sort in ascending order and click again to sort in descending order.
- The **Add Product** button is available to order a CPL or Jacket, respectively.
- 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 that we are sending to General Title, click the File Information screen.
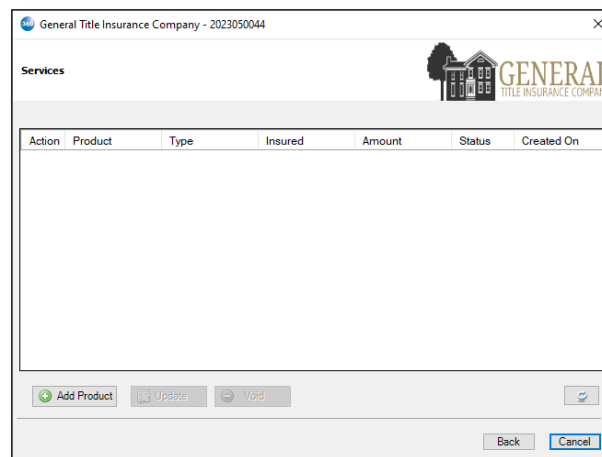
Available Products Screen

- Select **Closing Protection Letter** to navigate you to the **CPL Information** screen.
- Click **Close** to return to the **Summary** Screen.
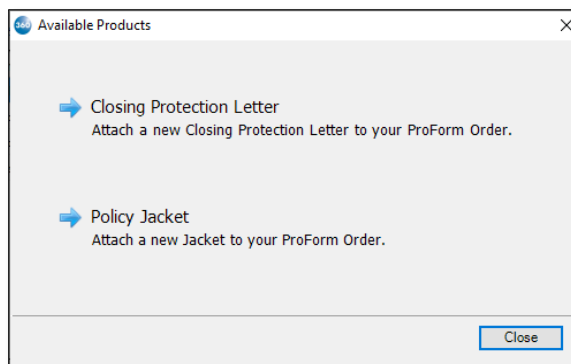
Requesting a CPL
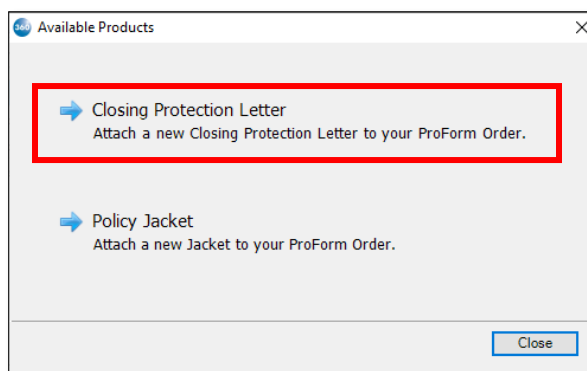
CPL Property Information Screen

- After CPL is selected, the Property Information Screen is displayed.
- Property Address
    - This dropdown will display any properties in the ProForm Order that match what was returned from General title. If there is only 1 property address that matches it will default to that property, otherwise, it will default to – Select Property Address -.
- Address 1
    - To pull Address 1 from ProForm of the selected Property Address.
    - Required
- Address 2
    - To pull Address 2 from ProForm of the selected Property Address.
    - Required

- City
  - To pull City from ProForm of the selected Property Address.
  - Required
- County
  - To pull County from ProForm of the selected Property Address.
  - Required
- State
  - To pull State from ProForm of the selected Property Address.
  - Read only field
- Zip
  - To pull Zip from ProForm of the selected Property Address.
  - Required
- Click **Next** to continue to the **CPL Information** screen.
- Click **Cancel** to return to the **Summary** Screen.

CPL Information Screen

If Closing Protection Letter (CPL) was selected, CPL Information Screen will display next.

- CPL Type
  - Select the CPL Type to send to General Title.
  - This is required.
- Loan Selection
  - Loan Selection will display all of the loans associated with the ProForm Order. If there are multiple, it will default to Select Loan otherwise it will default to the first loan.
  - This will display as Policy – Schedule A Purposed Insured, Loan Amount and Loan Number (Chase Bank, its successors and/or assigns as their $480,000.00 2309016499)
- Effective Date
  - This value is pulled from the Settlement Date/Time from the ProForm Order.
  - This field is required.
- Click **Cancel** to exit the CPL Screen
- Click **Next** to proceed to enter to the Covered Party Screens selected in CPL Type.

CPL Lender Information Screen

- If Lender was selected as a CPL Type, the Lender Information screen will display. This information populates based on the loan chosen in the Loan Selection dropdown.

The following fields will pull from the ProForm order.
- o Name
    - ▪ Name will display the Policy – Schedule A Purposed Insured
    - ▪ This is required
- o Address 1
    - ▪ This will display the address 1 of the loan selected in the Loan Selection dropdown.
    - ▪ This is a required field.
- o Address 2
    - ▪ This will display the address 2 of the loan selected in the Loan Selection dropdown.
- o City
    - ▪ This will display the city of the loan selected in the Loan Selection dropdown.
    - ▪ This is a required field.
- o State
    - ▪ This will display the state of the loan selected in the Loan Selection dropdown.
    - ▪ This is a required field.
- o Zip
    - ▪ This will display the zip of the loan selected in the Loan Selection dropdown.
    - ▪ This is a required field.

NOTE: If this screen is updated, it will **not** update in the ProForm Order.

- Click **Back** to return to the **CPL Information** Screen
- Click **Next** to proceed to the next screen or **Submit** to send the data to General Title.
- Click **Cancel** to return to the **Summary** Screen.

CPL Buyer/Borrower Information Screen

- If Buyer/Borrower was selected as a covered party, the Buyer/Borrower Information screen will display.

The following fields will pull from the ProForm order.
  - o Buyer/Borrower
    - This will display all buyers with an option to select BA.
  - o Name
    - This will display all what was selected in the Buyer/Borrower drop down.
    - This field is required.
  - o Address 1
    - This will display the address 1 of the Buyer/Borrower selected in the Buyer/Borrower dropdown.
    - This is a required field.
  - o Address 2
    - This will display the address 2 of the Buyer/Borrower selected in the Buyer/Borrower dropdown.
  - o City
    - This will display the city of the Buyer/Borrower selected in the Buyer/Borrower dropdown.
    - This is a required field
  - o State
    - This will display the state of the Buyer/Borrower selected in the Buyer/Borrower dropdown.
    - This is a required field.
  - o Zip
    - This will display the zip of the Buyer/Borrower selected in the Buyer/Borrower dropdown.
    - This is a required field

NOTE: If this screen is updated, it will **not** update in the ProForm Order.

- Click **Back** to return to the **CPL Information** Screen
- Click **Next** to continue to the next screen or **Submit** to send the data to General Title.
- Click **Cancel** to return to the **Summary** Screen.

CPL 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.
- o Seller
    - ▪ This will display all Sellers with an option to select SA.
- o Name
    - ▪ This will display all what was selected in the Seller drop down.
    - ▪ This field is required.
- o Address 1
    - ▪ This will display the address 1 of the Seller selected in the Seller dropdown.
    - ▪ This is a required field.
- o Address 2
    - ▪ This will display the address 2 of the Seller selected in the Seller dropdown.
- o City
    - ▪ This will display the city of the Seller selected in the Seller dropdown.
    - ▪ This is a required field
- o State
    - ▪ This will display the state of the Seller selected in the Seller dropdown.
    - ▪ This is a required field.
- o Zip
    - ▪ This will display the zip of the Seller selected in the Seller dropdown.
    - ▪ This is a required field

NOTE: If this screen is updated, it will **not** update in the ProForm Order.

- Click **Back** to return to the **CPL Information** Screen
- Click **Next** to continue to the next screen or **Submit** to send the data to General Title.
- Click **Cancel** to return to the **Summary** Screen.

CPL Other Information Screen

- If Other was selected as a covered party, the Other Information screen will display.

The following fields will pull from the ProForm order.
- o Contact
  - ▪ This will display all buyers, sellers, and Lender contacts within the ProForm order.
- o Name
  - ▪ This will display all what was selected in the Contact drop down.
  - ▪ This field is required.
- o Address 1
  - ▪ This will display the address 1 of the Contact selected in the Contact dropdown.
  - ▪ This is a required field.
- o Address 2
  - ▪ This will display the address 2 of the Contact selected in the Contact dropdown
- o City
  - ▪ This will display the city of the Contact selected in the Contact dropdown
  - ▪ This is a required field
- o State
  - ▪ This will display the state of the Contact selected in the Contact dropdown
  - ▪ This is a required field.
- o Zip
  - ▪ This will display the zip of the Contact selected in the Contact dropdown
  - ▪ This is a required field

NOTE: If this screen is updated, it will **not** update in the ProForm Order.

- Click **Back** to return to the **CPL Information** Screen
- Click **Submit** to send the data to General Title.
- Click **Cancel** to return to the **Summary** Screen.

CPL Sending Page

The Sending Page will display with a status bar when sending the product request to General Title.
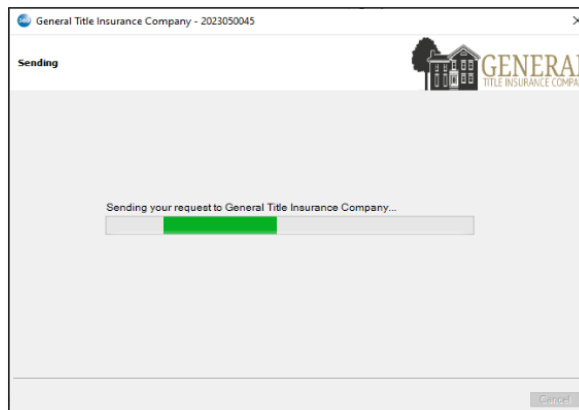
Reviewing CPL from General Title

When the status changes to Ready, user will click on the paper icon under Action to be taken to the review (next screen) 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.
- CPL Information
  - o CPL Document ID
    - ▪ This value will produce a note on the ProForm Order.
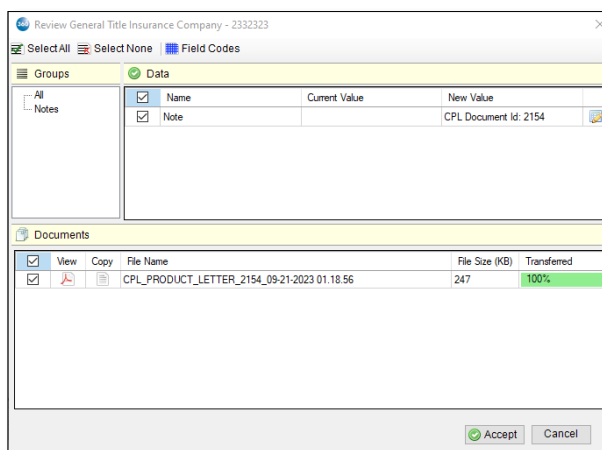
Voiding CPL

From the **Summary** screen, you can Void a CPL that you previously created from the Order.

- Highlight the CPL/Jacket transaction from the list that you want to edit and click the **Void** button.
- Upon click of the **Void** button, you will be prompted "Are you want to want to void [Product Type]?"
  - o Click Yes to send the void request to General Title.
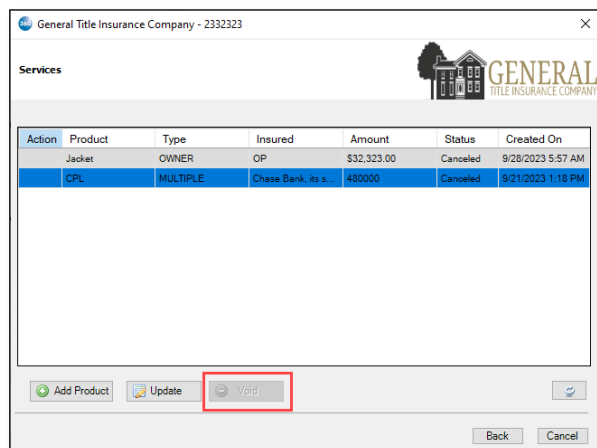
- o   Click No to return to the **Summary** screen.
- Once the void has been sent to General Title, you will see the Status has been changed to Canceled.

Updating CPL

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

- Highlight the CPL transaction from the list that you want to edit and click the **Update** button.