

# General Title Insurance Company Policy Jacket User Guide

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4800 Falls of Neuse Road, Suite 600 | Raleigh, NC 27609  
p (800) 848-0143 | f (919) 755-8350 | [www.softprocorp.com](http://www.softprocorp.com)

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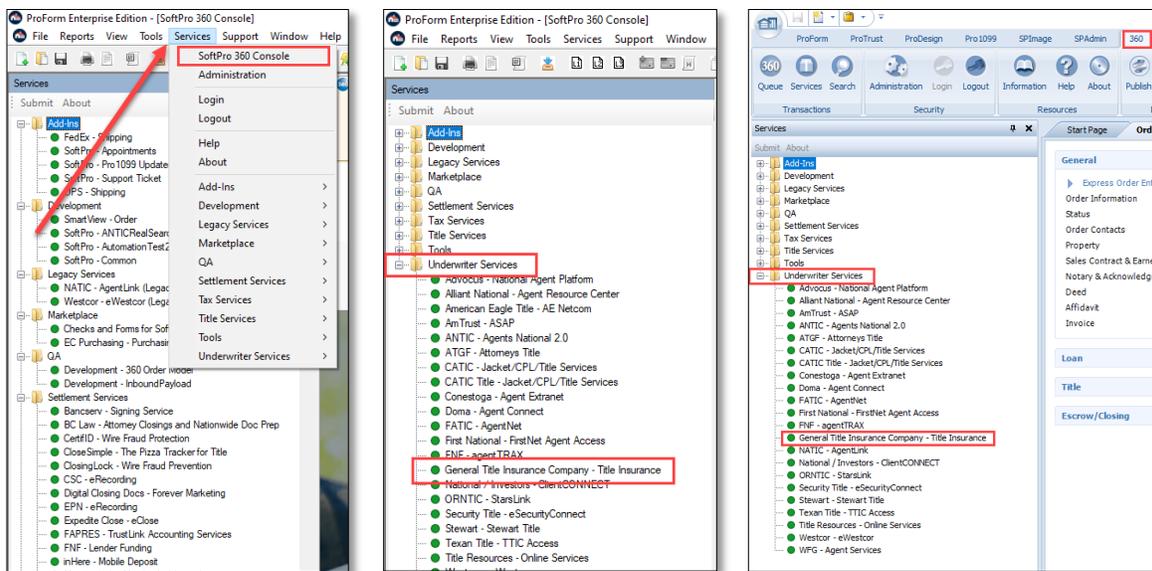
## Introduction

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.

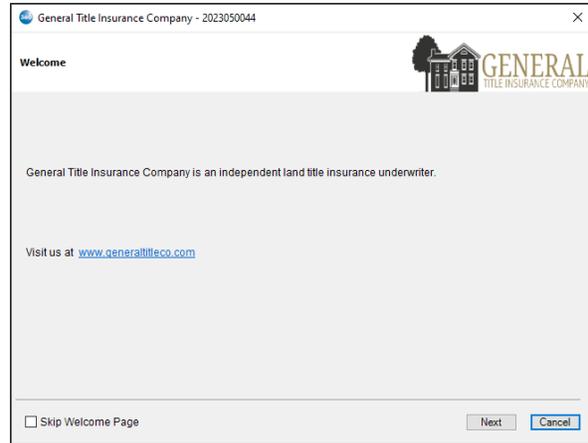
## Accessing General Title Insurance Company

From the Select toolbar:

1. Select the Services tab.
2. Click the Underwriter Services folder to expand.
3. Double-click **General Title Inc.**

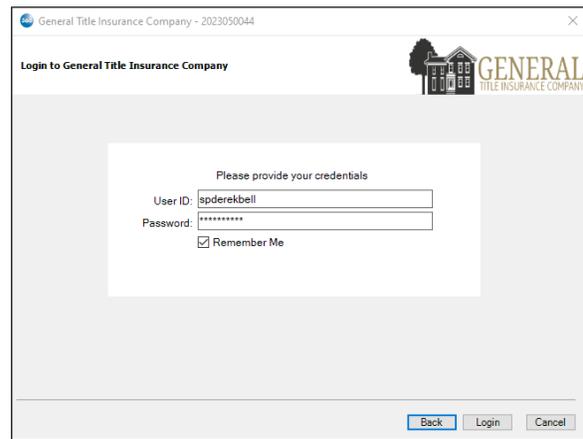


- The Welcome screen appears providing information on the General Title Integration.
- The **Skip Welcome Screen** checkbox will prevent the Welcome screen from being shown in the future when opening General Title.
- Click the **Cancel** button to exit the General Title process.
- Click the **Next**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



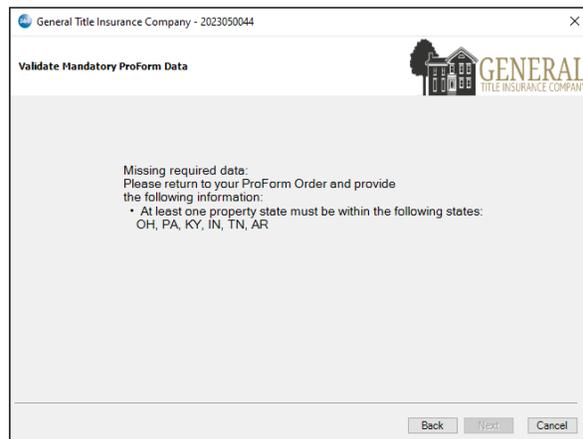
## Logging into General Title

- 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 Policy Jackets that have been ordered.
- Order a Policy Jacket.
- 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 Policy Jacket:

**Action:**

-  **Review**: 360 has received the Policy Jacket 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 Policy Jackets, the value will always be **Policy Jacket**.

**Type:** Displays the type of product ordered. Policy Jacket request will display the Policy Type selected (OP, LP, SF, etc.)

**Insured:** Insured Party

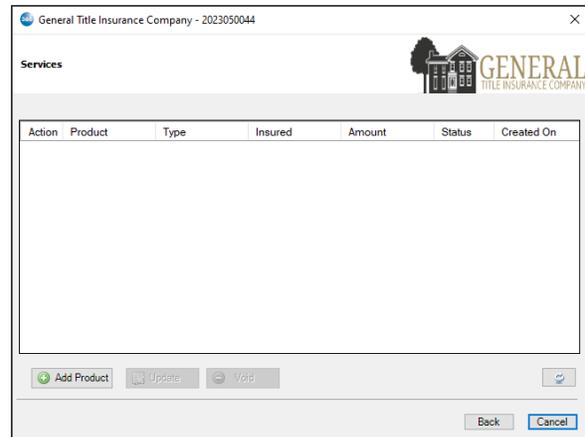
**Amount:** Liability amount will appear for the policy jackets only.

**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.

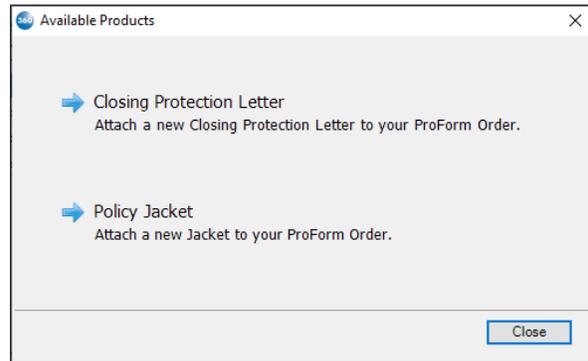
**Created On:** Date and time stamp of when the product was generated.

- 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 Policy 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.

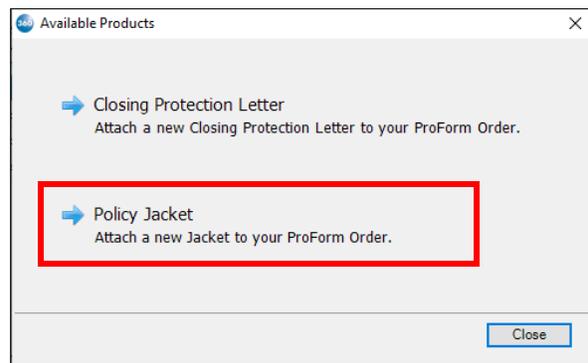


## Available Products Screen

- Select **Policy Jacket** to navigate you to the **Jacket Selection** screen.
- Click **Close** to return to the **Summary** Screen.



## Requesting a Policy Jacket



## Policy Property Information Screen

- After Policy Jacket 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 **Jacket Selection** screen.
- Click **Cancel** to return to the **Summary** Screen.

## Policy Jacket Selection Screen

The Policy Jacket Selection screen will display to review/edit the following information.

- Effective Date
  - This value is pulled from the Settlement Date/Time from the ProForm Order.
  - This is a required field.
- Jacket Selection 1
  - Jacket Selection 1 will default to – Select –.
  - Options for Jacket Selection 1 are returned from General Title.
  - This is a required field.
- Coverage Amount
  - Coverage Amount will pull from the ProForm order if an existing policy type matches what is selected in Jacket Selection 1.
  - This is a required field.
- Jacket Selection 2
  - Jacket Selection 2 is dependent on a selection in Jacket Selection 1.
  - Jacket Selection 2 will default to – Select –. Options for Jacket Selection 2 are returned from General Title.
  - This is a required field.
- Coverage Amount
  - Coverage Amount will pull from the ProForm order if an existing policy type matches what is selected in Jacket Selection 1.

The screenshot shows a web application window titled "General Title Insurance Company - 2023050045". The main content area is titled "Jacket Selection" and features the General Title Insurance Company logo. The form contains the following fields and values:

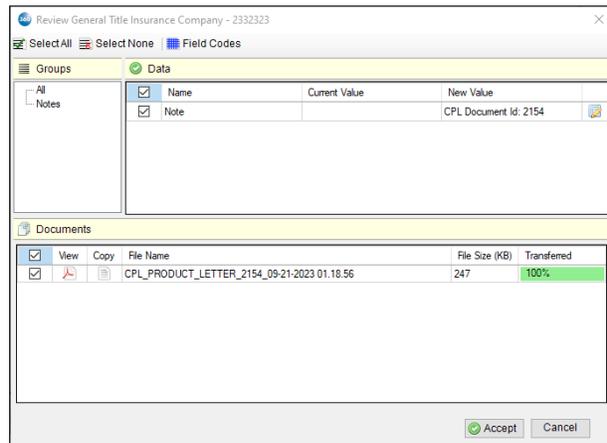
- Effective Date: 09/21/2023
- Jacket Selection 1: OP
- Coverage Amount: \$4,324.00
- Jacket Selection 2: LP
- Coverage Amount: \$25,000.00

At the bottom of the form, there are three buttons: "Back", "Next", and "Cancel".

- This is a required field.
- Click **Back** to return to the **Property Information Selection Screen**
- Click **Next** to continue to **Policy/Endorsement Information Screen**.
- Click **Cancel** to return to the **Summary Screen**.

## Policy/Endorsement Information Screen

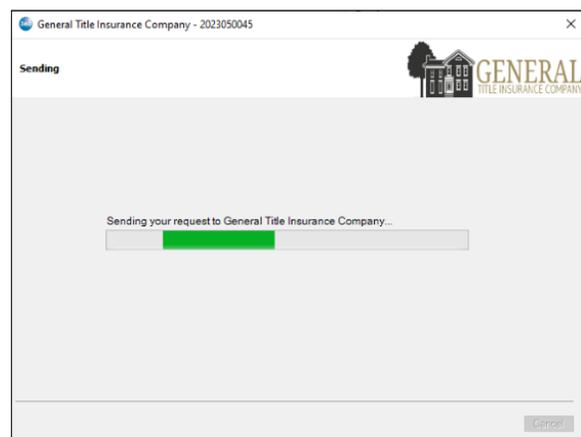
- The Policy/Endorsement Information screen will display to review/edit the following information.
  - Top Grid
    - This will display fields returned from General Title and map from ProForm if available.
  - Bottom Grid
    - This will display Endorsements returned from General Title and map from ProForm if available.



- Click **Back** to return to the **Policy Selection Screen**.
- Click **Submit** to submit your product request to General Title.
- Click **Cancel** to return to the **Summary Screen**.

## Policy Jacket Sending Page

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



## Reviewing Policy Jacket 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.
- Policy Jacket Information
  - Loan/Owner Policy Number
    - This value will write to the Policy Number of the associated Loan/Owner Policy.

Name	Value
Property Type	Residential
Policy Effective Date	09/21/2023 00:00
Policy Reissue	false
Policy State Tax Based Upon	City

Code	Endorsement
<input checked="" type="checkbox"/> ALTA8.1	ALTA 8.1-06 - Environmental Protection Lien
<input type="checkbox"/> CPLB	Closing Protection Letter
<input type="checkbox"/> ALTA3OP	ALTA 3 Zoning Vacant Land - Owners
<input type="checkbox"/> ALTA3LP	ALTA 3 Zoning Vacant Land - Lenders
<input type="checkbox"/> ALTA7	ALTA 7 Manufactured Housing Unit

## Voiding Policy Jacket

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

- Highlight the 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]?”
  - Click Yes to send the void request to General Title.
  - 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.

Action	Product	Type	Insured	Amount	Status	Created On
Jacket	OWNER	OP		\$32,323.00	Canceled	9/28/2023 5:57 AM
	CPL	MULTIPLE	Chase Bank, its s.	480000	Canceled	9/21/2023 1:18 PM

## Updating Policy Jacket

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

- Highlight the Policy Jacket transaction from the list that you want to edit and click the **Update** button.
- Policy Jacket Update
  - Upon click of the **Update** button, you will be taken through the Jacket Workflow
    - The following fields will be available for updating
      - Property Address1
      - Property Address2
      - Property City
      - Property County
      - Property Zip
      - Effective Date
      - Coverage Amount
      - Jacket Selection 2 (Only if this selection was not made with the original request)
      - Coverage Amount
      - Policy/Endorsement Information

