

Managing National/Investors Client *CONNECT* Title Insurance in SoftPro 360 User Guide

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How to Submit a Transaction to National/Investors Title Insurance

The National/Investors Title Insurance Client*CONNECT* application allows agents to order Title Insurance Policy Jackets (Jackets) and Closing Protection Letters (CPLs) via SoftPro 360. **The National/Investors Title Insurance – Client***CONNECT* **service can be found in the SoftPro360 Services menu under Underwriter Services**. Double click the National/Investors entry or highlight it and click **Submit** to place an order.

🗄 📲 Underwriter Services
FATIC - AgentNet
FNTG - agentTRAX
🔵 NATIC - AgentLink
\cdots 🔵 National / Investors - ClientCONNECT
ORNTIC - StarsLink
Stewart - Stewart Access
Title Resources - Online Services
• Westcor - eWestcor
WFG - Agent Services

Order Linking

If a ProForm order(s) is opened, it will be listed in the **Order Linking** dialog. The active order will be highlighted and entered in the **Selected Order Number** field. Any of these open orders can be selected or the **Selected Order Number** field can be overwritten with an order that is not currently open. Click **OK** to continue.

Order Linking	
Open Order Numbers: 2015100105 2015100107	
Selected Order Number: 2015100107 OK Cancel	

Login Screen

The **Login** screen requires a National/Investors Title Insurance Username and Password. The Property State must be entered within the ProForm order to log into National/Investors Title Insurance. Agents who have not registered will need to contact their agency representative.

If you check "Remember me" the product will retain your Username and Password and log you in automatically the next time your launch the National/Investors Title Insurance – Client*CONNECT* service.

If credential assistance is needed you may click the applicable link, **Forgot username** or **Forgot password**, to launch the National/Investors Title Insurance Client Connect in your web browser where you may resolve authentication and access issues.



Once your Client*CONNECT* credentials are entered into the Login Screen, **Click Next** to continue.

Issuing Office

If your account has access to mulitple Issuing Offices, you will be presented with the **Issuing Office** screen. This screen will display the available issuing offices which can be used for your ProForm Order. Highlight the desired Issuing Office and click **Close** to continue.

ClientCONNECT - 2015100107	
Issuing Office	Investors Title National Investors
File: 2015100107 Property: 144 Spirngberry Ln Underwriter File: -	Issuing Office: Borrower: Stan P. Smith
Choose an Issuing Office for this Order	
ZZ Test Account 7 (SE Agent Services)	
ZZ Test Account 3	
	E
	*
Back	Close

The **Title Services** screen shows the National/Investors Title Insurance transactions that are associated with the linked ProForm order.

To order a National/Investors Title Insurance service, click the **Add Product** button.

ClientCONNECT - 2015100107				
Title Services		Investors Title Insurance Comp	le National Investors Title Insurance	Stors Company
File: 2015100107 Underwriter File: -	Property: 144 Spirngberry Ln,	Issuing Office: Borrower:	Chapel Hill Issuing Stan P. Smith	
Add Product			Cancel All	9
Back				Close

Ordering a Jacket or CPL

To order a Jacket or CPL, click the **Add Product** button at the bottom of the **Title Services** screen.

A list of available products will **expand** from the **Add Product** button. These products are grouped by product type.

NOTE: The grouping and list of available products varies from jurisdiction to jurisdiction.

Select the product you wish to order by clicking the product you wish to order.

If you have already ordered the same product on for that ProForm Order, you will be presented with the **Duplicate Product** dialog.

This dialog allows you to **Update Existing** product or **Add Another** of the same Client*CONNECT* product. You can also click **Cancel** to cancel the **Add Product** request.

ClientCONNECT - 2015100107	22
Title Services Investors Title	National Investors
File: 2015100107 Property: 144 Spirngberry Ln, Issuing Office: C	Chapel Hill Issuing
Closing Protection Letters	
CPL - Lender (01-2003)	
CPL - Buyer/Borrower (01-2003)	
Jackets	
Lender Policies	
ALTA Loan Policy (06-17-06)	
ALTA Short Form Residential Loan Policy (12-03-12)	
ALTA Expanded Coverage Residential Loan Policy - Assessments Priority (04-02-15)	
ALTA Expanded Coverage Residential Loan Policy (Revised 12-02-13)	
ALTA Short Form Expanded Coverage Residential Loan Policy - Assessments Priority (04-02-15)	
ALTA Short Form Expanded Coverage Residential Loan Policy (04-02-14)	
ALTA Residential Limited Coverage Junior Loan Policy (08-01-12)	
ALTA Short Form Residential Limited Coverage Junior Loan Policy (04-02-13)	
Owner Policies	
ALTA Owner's Policy (06-17-06)	
ALTA Homeowner's Policy (Revised 12-02-13)	
ALTA U.S. Policy Form (09-28-91) Revised (12-03-12)	
Add Product	Cancel All 🛫
Back	Close

(Duplicate Product
	Add another instance of this product or update existing one? This file already contains a "T-1: Texas Owners Policy". Do you want to add another one?
	Update Existing Add Another Cancel

Product Information Screens

Once you have selected the product from list of available products, you will be presented with a **Add Products** screen. The layout and content of this screen will vary depending on the product you've selected.

Closing Protection Letters (CPL) Add Products Screen

When ordering Closing Protection Letters (CPLs) you will be presented with an **Add Products** screen with the nesessary fields for the generation of the CPL.

ClientCONNECT - 2023	040034		×
Add Produ	cts	Investors Title Inse	varice Company National Investors National Investors Title Insurance Company
File: 202 Underwriter File: -	3040034 Property: 123 Main Stre	et, Cli Issuing Bor	Office: HBI Title Services, I rower: First Last
Products to Reques	it		Product Suffix:
Product Details		1	
Settlement Provider:	United Title Agency Co., LLC	CPL coverage limit:	\$550,000.00
Buyer/borrower:	First Last	CPL Transaction Code:	- Select -
Loan amount:	\$550,000.00	Property usage:	Residential ~
Loan number:	JSH999999	Property address(es):	123 Main Street, Cli
Lender name:	Hedges Mortgage LLC]	456 april bubble, Cl 💿 🦷
Lender address:	123 Main Street, warren, KY, 48035 O	2	
Lender email:	Optional		
Lender fax:	Optional]	
Attention:	Optional]	
Successor/clause:	Smith Mortgage		
	View all information being sent to underwriter		
Back			Send Request Cancel

Property Address(es) Screen

To access the **Property Address(es)** screen, click

View icon located to the right of the **Property** address(es) text box (shown on the image above as **Item 1**) The **Property Address(es)** screen will allow you to edit the property information from your ProForm Order. All properties from your ProForm Order will be populated within the **Property Adddress(es)** screen.

You can also add additional properties to be associated with the product being ordered.

To add an additoinal property, click the **Add Another** button. Enter the street address and/or legal description for the property.

To include the newly added property with the product request, check the box next to the address in the **Addresses** field.

Property Address(es)	
Addresses:	Edit selected address: 144 Spingbery Ln
	Chapel Hill NC + 27517
	And/or edit legal description:
Add Another	Remove
	Ok Cancel

Lender Address Dialog

To review and adjust the Lender Address for the CPL, click on the

View icon located to the right of the **Lender address** text box (shown on the image above as **Item 2**) The **Lender Address** dialog will allow you to edit the lender address information from your ProForm Order.

💩 Lender Address	×
Edit address: 4800 Falls of Neuse Rd]
Raleigh AL V 27609]
Ok Cance	ا

Additional Information Being Sent to Underwriter

Along with the information contained on the **Add Product** screen, National/Investors Title Insurance will obtain additional information from the ProForm Order.

To view the additional information being sent to National/Investors Title Insurance Company, click on the **View all information being sent to underwriter** link. You will be presented with a list of the data being transmitted with the product request.

Add Products	ClientCONNECT - 2023	1040034			×		
Yie 20230001 Paparity 123 Main Street, C.L. Burnary Ere Last Defauer-infer Far Burnary Ere Last Product Sto Request Product Suffix Of Clander Product Suffix Product Suffix Product Suffix Defauer-inter Result Of Connectors Context Suffix Defauer-inter Result Product Suffix Defauer-inter Result <td>Add Produ</td> <td>cts</td> <td>Investo</td> <td>rs Title Nationa</td> <td>Investors</td> <td></td> <td></td>	Add Produ	cts	Investo	rs Title Nationa	Investors		
Policitis to Request Of Linder Policit Stof Request Beinemit Reoder: Beinemit Reoder: Die monoritie Lane monoritie Die monoritie Lane monoritie Die monoritie Lane monoritie Lane monoritie Lane monoritie Lane monoritie Lane monoritie Lane monoritie Laneit metrix Laneit effertigging Laneit metrix Laneit effertigging Laneit effertigging Laneit effertigging Laneit effertigging Laneit effertigging Laneit effertigging Laneit effertiggingin	File: 202 Underwriter File: -	2040034 Property: 123 Main Stree	et, Cl Inving Bo	Office: HBI Title Servic	m, L.		
OK Lenter Product 1s/file: Product Deckals Super learners Product 1s/file: Super learners Product 1s/file: Leader name Social annound: Social annound: Social annound: Leader name Social annound: Leader nami So	Products to Reques	at in the second s					
Product DetAils Buyer Ibarrawa Pred Tér Aperoy Cé. LLC Ci. coverage Init. Buyer Ibarrawa Pred Tér Aperoy Cé. LLC Ci. coverage Init. Lende House Stocome Stocome Stocome Lende House Stocome Lende House Stocome Lender House Stocome Stocome Fore House Lender House Stocome North Stocome Nore Information Stocome	CPC Lender			Product Suffix:	~		
Servicence Provide: Predet Tile Agency Co. LLC CPL converge inter. Service Buyer Iborrawse: Field Tile Agency Co. LLC CPL converge inter. Service Loan anound: Service Preperty usage Predet Tile Service Service Loan anound: Service Preperty usage Predet Tile Service Serv	Product Details						
Buyer bornsver First Lad CPL Transaction Cade Sale Loon smouth 555000.00 Property usage Feederad Conternation Sent to Underwriter Conternation Sent to Underwriter Lander name Feederaddress 23 Mea Struct OF 23 Mea Struct OF Purchase Conternation Type Purch	Settlement Provider	United Title Agency Co., LLC	O's coverage limit	8550.000.00			
Loter Bround: \$550.000.80 Property usage Property	Buyer/borrower:	First Land	CPL Transaction Code:	Select	1.0		
Laar in unritiest [HH99999] Laardier name Regeny addression Lander name Regeny addression Lander name Reference New all reference Reference New all reference Reference New all reference Reference Reference Reference <t< td=""><td>Loan amount</td><td>\$550,000.00</td><td>Property usage</td><td>Residential</td><td>Information Sent to Und</td><td>lenwriter</td><td>K</td></t<>	Loan amount	\$550,000.00	Property usage	Residential	Information Sent to Und	lenwriter	K
Lender neme Fedder Notgage LLC Order - Transaction Type Purchase Lender neme Data Sine, wenn KY, 4005 Order - Transaction Type Purchase Lender neme Data Sine, wenn KY, 4005 Order - Transaction Type Purchase Seccesser/statue Data Sine, wenn KY, 4005 Order - Transaction Type Purchase New all information bains set to underwriter Fedder Notgage Residential Property - Address 144 Spimgbeny Ln, Chapel Hill, TX, 27517 Property - Address 144 Spimgbeny Ln, Chapel Hill, TX, 27517 Property - Usage Residential Property - Usage Residential Property - EscrowDescription And known as being Sublot Number 40 Brownell Drive in Shady Grove Property - Parcel Id 16-C-068-E-02-040-0 Property - Lot Number 12345 Buyer - Address- Address-EdderssLine1 144 Spingbeny Ln Buyer Address-State NC Buyer Address-State NC Buyer Address-Zip 27510 Buyer Address-Zip 27510 Buyer Address-Zip 27510 Buyer Address-Zip 27510 Buyer Address-Zip 27510	Loan number:	J/5H000000	Property address(in):	123 Rain Streat, Cl 455 april tubble: Cl.			_
Lender state Contract Sales Price 123123.00 Lender state Contract Sales Price 123123.00 Seconsection Free Handberg Order - Contract Sales Price 123123.00 Seconsection Free Handberg Order - Settlement Date Property - Address Seconsection Free Handberg Property - Address 144 Spingberg Ln, Chapel Hill, TX, 27517 Property - Usage Residential Property - Usage Residential Property - Parcel Id 16-Cot88-E-02-040-0 Property - Lot Number 12345 Buyer - Address- Address-E-02-040-0 Property - Lot Number 12345 Buyer Address- State NC Buyer Address-State NC Buyer Address-Zip 27510 Buyer Address-Zip 27510 Buyer Address-Zip 27510 Buyer Address-Zip 27510 Buyer Address-Zip 27510 Buyer Address-Zip 27510	Lender name	Hedges Motgage LLC			Order - Transaction Type	Purchase	-
Lander trait Corder - Settlement Date From the construction of the mathematican barro set to underwriter Property - Address 144 Spimgberry Ln, Chapel Hill, TX, 27517 Property - Vusage Residential Property - Usage Residential Property - Parcel Id 16-C-068-E-02-040-0 Property - Lot Number 12345 Buyer - Address- AddressLine1 144 Springberry Ln Buyer Address- State NC Buyer Address- State NC Buyer Address- Zip 27510	Lender address	123 Man Steed, somer, KY, 43235 O			Order - Contract Sales Price	123123.00	-
Lander far: Decrete Property - Address 144 Spimgberry Ln, Chapel Hill, TX, 27517 Seconsection Fred Margage Residential View all infermation barro sert to adversater Property - Usage Residential Property - Parcel Id 16-C-068-E-02-040-0 Property - Lot Number Property - Name Stan P. Smith Buyer Address- City Carboro Buyer Address- State NC Buyer Address- Zip 27510	Lender erneit	External			Order - Settlement Date		- 1
Aintendion Decomposition Property - Usage Residential Property - Usage Residential Property - Escrow Description And known as being Sublot Number 40 Brownell Drive in Shady Grove Property - Parcel Id 16-C-068-E-02-040-0 Property - Varcel Id 16-C-068-E-02-040-0 Property - Name Stan P. Smith Buyer - Address-AddressLine1 144 Springberry Ln Buyer Address-State NC Buyer Address-Zip 27510 Buyer People - First name Stan D D D	Lender fax:	Optoral			Property - Address	144 Spimgberry Ln, Chapel Hill, TX, 27517	-
Second ended Property - Escrow Description And known as being Sublot Number 40 Brownell Drive in Shady Grove Property - Parcel Id 16-C-068-E-02-040-0 Property - Parcel Id 16-C-068-E-02-040-0 Property - Lot Number 12345 Buyer - Name Stan P. Smith Buyer Address-AddressLine1 144 Springberry Ln Buyer Address-State NC Buyer Address-Zip 27510 Buyer People - First name Stan Dev L No. H. H. Dev L No. H. H.	Attention	Optional			Property - Usage	Residential	-
Nax all retended bard sard builded sard sard sard sard sard sard sard sar	Successe/clause	Srith Mortgage			Property - EscrowDescription	And known as being Sublot Number 40 Brownell Drive in Shady Grove	-
Back Property - Lot Number 12345 Buyer - Name Stan P. Smith Buyer Address-AddressLine1 144 Springberry Ln Buyer Address-City Carboro Buyer Address-State NC Buyer Address-Zip 27510 Buyer People - First name Stan D D D	L	View all information being sent to underwriter			Property - Parcel Id	16-C-068-E-02-040-0	-
Buyer - Name Stan P. Smith Buyer Address- AddressLine1 144 Springberry Ln Buyer Address- City Carboro Buyer Address- State NC Buyer Address- Zip 27510 Buyer People - First name Stan	lavy.		100	Send Request	Property - Lot Number	12345	-
Buyer Address-AddressLine1 144 Springberry Ln Buyer Address-City Carboro Buyer Address-State NC Buyer Address-Zip 27510 Buyer People - First name Stan D D D D Close					Buyer - Name	Stan P. Smith	_
Buyer Address- City Camboro Buyer Address- State NC Buyer Address- Zip 27510 Buyer People - First name Stan					Buyer Address-AddressLine1	144 Springberry Ln	_
Buyer Address-State NC Buyer Address-Zip 27510 Buyer People - First name Stan					Buyer Address-City	Camboro	
Buyer Address-Zip 27510 Buyer People - First name Stan D D to M H # D Close					Buyer Address-State	NC	
Buyer People - First name Stan					Buyer Address-Zip	27510	
Close					Buyer People - First name	Stan	
Close							
						Close	

Policy Jackets (Jackets) Add Products Screen

When ordering Policy Jackets (Jackets) you will be presented with an Add Products screen with the nesessary fields for the generation of the Jacket.

You may edit the information on the screen and can also review the additional information being sent to the underwriter.

Should your ProForm Order contain multiple policies for that given policy type, e.g. Loan Policies or Owner's Policies, the **Policy selection** drop-down will be enabled and allows you to select the corresponding policy from your ProForm Order.

Underwrite	File: 1 er File: -	2023040034	Property: 123 Main St	r reet, Cli Issuing Bo	Office: Independe rrower: First Last	nce Title
Products	to Requ Texas Loa	uest an Policy			Product Suffix:	
Product D	Details				D. H. et	
Policy s	election:	Loan	~	Property usage:	Residential	
Policy c	overage:	\$15,000.00		Property Out of County?:	No	
		View all information b	being sent to underwriter	Settlement Provider:	Bay City Abstract & Ti	le Company
				Policy Transaction Code:	3010]
				Lender name:	Hedges Mortgage LL	C
				Loan amount:	\$550,000.00	

Submitting Product Requests

Once satisfied with the information contained on the **Add Product** screen, you may submit your request to National/Investors Title Insurance Company by clicking the **Send Request** button on the bottom right of the **Add Products** screen. This button will be enabled once all required information has been entered on this screen.

After a successful submission, you will be returned to the Title Services Screen.

Accepting Product Request

You may **Accept** the product into the order individually or as a group. You can accept the product into the order, by **clicking** the **Accept** button. Should you have multiple products to accept, you can click **Accept All** and all products that are ready to accept will be accepted into the ProForm Order.

ClientCONNECT - 2019050062		X
Title Services		Investors Title National Investors
File: 2019050062 Property: Underwriter File: ZZAA2015500597	132 Connection Stree Escrow Brief Legal t	Issuing Office: Chapel Hill Issuing Borrower: Robert P. Smith
Ready for You to Review		
T-1: Texas Owners Policy	10/15/2015	💿 View 🗸 Accept 🖋 📋
T-2: Texas Loan Policy	10/15/2015	💿 View 🗸 Accept 🖌 📋
		🗸 Accept All
Existing Products for this Order		
T-50: Insured Closing Servi	10/15/2015	💿 View 🖌 Update
Add Product		Cancel All 🥥
Back		Close

National/Investors Title Insurance will return the Jacket(s) and CPL(s) promptly. When a product has been accepted into the ProForm Order, the document(s) will be available to all Standard and Enterprise users from

within the ProForm order via the **SPImage** icon located on the ProForm Menu bar (a SPImage license is not required to access SPImage. SPImage will become unlocked for the order once a document is accepted into the order via SoftPro 360).

File View Document Mod	le Tools Services Window Help

For Select users, the document(s) will be available by clicking the **Attachments** button located on the **Order** tab.

1		Order Tools		Orde	er 2015100104123* - SoftPro Select
	ProForm ProTrust Pro1099 SPImage SPAdmin	360 Order			
egister	Checklist Tasks Requested Tasks Notes	Documents Attachments	Document History	 Apply Template Overlay Order Rename Order 	Submit
	Quick Links	Docume	ents	Actions	Workflow

The accepted jacket number(s) will be available within the ProForm order in the Policy Number field(s). In the event the Policy Number of the policy in the ProForm order has a value and does not match the new policy number, you will be presented with the **Policy Number Change** dialog.

You may replace the value in your ProForm Order with the new Policy Number by clicking the **Accept Update** button or click **Cancel** to keep the current value.

Editing or Modifying a Product Request

If you wish to edit/modify the product prior to accepting the product into the ProForm order you can do so by clicking the **Edit** icon adjacent to the product.



SclientCONNECT - 2019050062		×
Title Services		Investors Title National Investors Industry I Industry Industry Title Investor Conjuny
File: 2019050062 Property Underwriter File: ZZAA2015500597	 132 Connection Stree Escrow Brief Legal t 	Issuing Office: Chapel Hill Issuing Borrower: Robert P. Smith
Ready for You to Review		
T-1: Texas Owners Policy	10/15/2015	O View ✓ Accept ✓
T-2: Texas Loan Policy	10/15/2015	So View ✓ Accept
		✓ Accept All
Existing Products for this Order		
T-50: Insured Closing Servi	10/15/2015	💿 View 🖋 Update 📋
Add Product		Cancel All 🖉
Back		Close

Cancelling a Product Request

To void a specific product, after clicking the

Cancel icon, you will be prompted to confirm the cancellation request. Click **Yes**, to proceed to the **Cancel Reason** screen, or **No**, to return to the **Title Services** screen.



For CPL Products, your request will be sent to Investors for cancellation.



For Policy Jackets, you will be presented with a **Cancel** screen for a cancellation reason. Select a **Cancel Reason** returned by Investors Title. Click **Submit** to cancel the specific product to Investors Title.

🥶 Cancel	×
Product:	
ALTA 2021 Loan Policy	
Cancel Reason:	
- Select -	
Back Su	bmit

Cancelling All Products

To void all requested products, after clicking the **Cancel All Button**, you will be prompted with, "Are you sure you want to cancel?". Click **Yes**, to proceed to the **Cancel Reason** screen, or **No** to return to the Title Services Screen.



After clicking **Yes**, you will be presented with a **Cancel Screen** for a Batch Cancellation Reason. Select a Cancel Reason returned by Investors Title. The selected reason will be sent to Investors for each Policy Product requested. Click **Submit** to cancel the specific product to Investors Title.

🤓 Cancel	×
Product:	
Batch Cancellation	
Cancel Reason:	
- Select -	*
Back	Submit

Changing the Issuing Office After Products Have Been Ordered:

Should you wish to change the Issuing Office after you have ordered products for that ProForm Order, you will be presented with a **Product Cancellation Dialog**. If you change the Issuing Office you must cancel all existing products that were issued under the prior Issuing Office.



Policy Image Upload

To send the Policy Image to Investors Title, use the **Policy Image Upload Button** on the **Title Services** screen. This button will be enabled when ALL Policy Requested are in the **ACCEPTED** status.

ClientCONNECT - 2023041451IL	×
Title Services	Investors Title National Investors
File: 2023041451IL Property: 123 N Test S Underwriter File: N0102023000221 Short Legal	t, Illin Issuing Office: HBI Title Services, I Descript Borrower: Buyer One and Buy
Existing Products for this Order Date issued Date issued ALTA 2021 Loan Policy 4/6/2023	O View ✓ Update □
Add Product	Policy Image Upload Cancel All
Back	Close

*A tooltip displays alerting the user why this button is disabled.

Add Product	Policy Image Upload Cencel All C Policies must be present and in Accepted or Completed status prior to Policy Image Upload - including updates.
Back	Close

Upon clicking the **Policy Image Upload Button**, you will be prompted with a **Policy Document Upload(s)** screen.

- At least 1 document is required to be uploaded.
- Warning Please Note Only PDF version of the documents will be supported and the file size alone or combined may not exceed 65mb.
- Document Type is a required field
 - This list is returned from Investors Title.

Click **Submit** to submit your request to National / Investors.

Submit is enabled after a document is uploaded and a Document Type is selected.

Click **Close** to return to the **Title Services Screen**.

Upon Submit, you will see a message returned from National / Investors.

realing	Size	Туре	Browse
Investors_PIU.pdf	276.45 KB	Select	✓ ★ Attachments
			Documents
			Rename
			Delete

G ClientCONNECT - 2023040003		×
Sending policy to Investor's Title		
2010/10 200		
Order submitted successfully.		
OK		
Back	Next	Close