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

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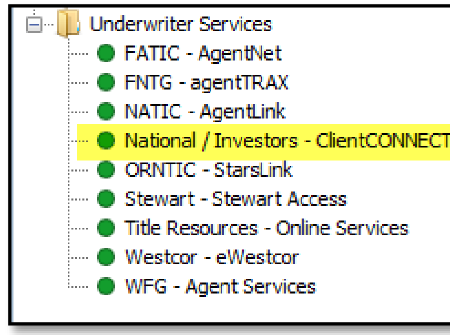
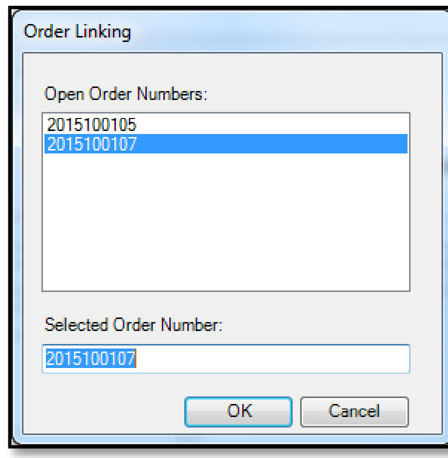
## How to Submit a Transaction to National/Investors Title Insurance

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.




## 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.

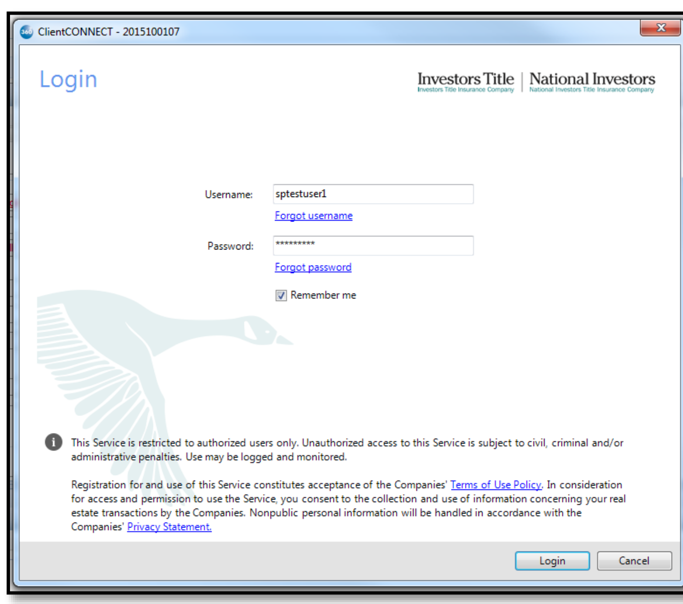



## Login Screen

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.

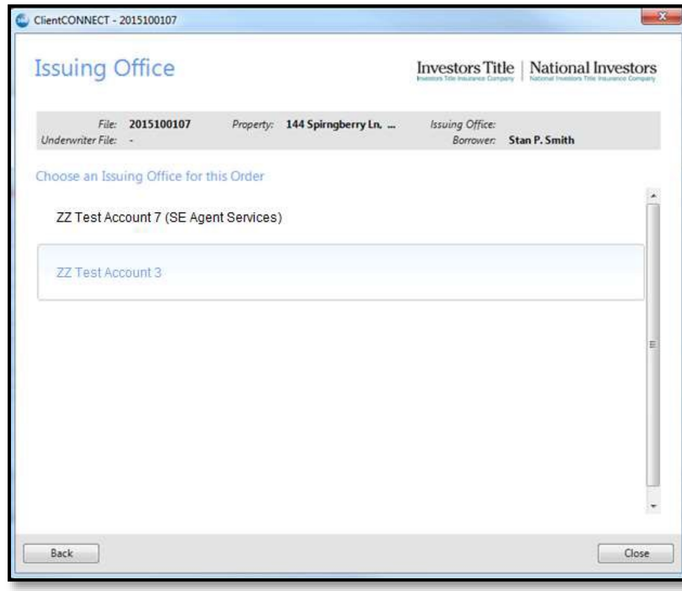
If credential assistance is needed you may click the applicable link, **Forgot username** or **Forgot password,** to launch the National/Investors Title Insurance Client Connect in your web browser where you may resolve authentication and access issues.



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

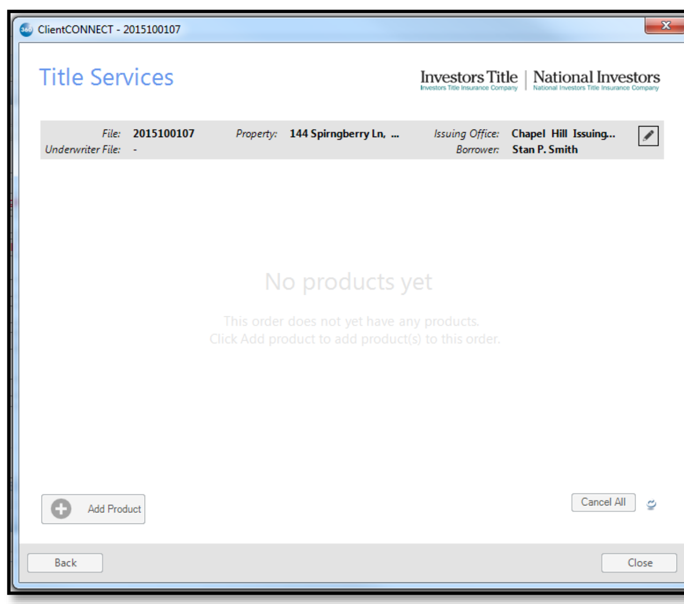
## Issuing Office

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.




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.



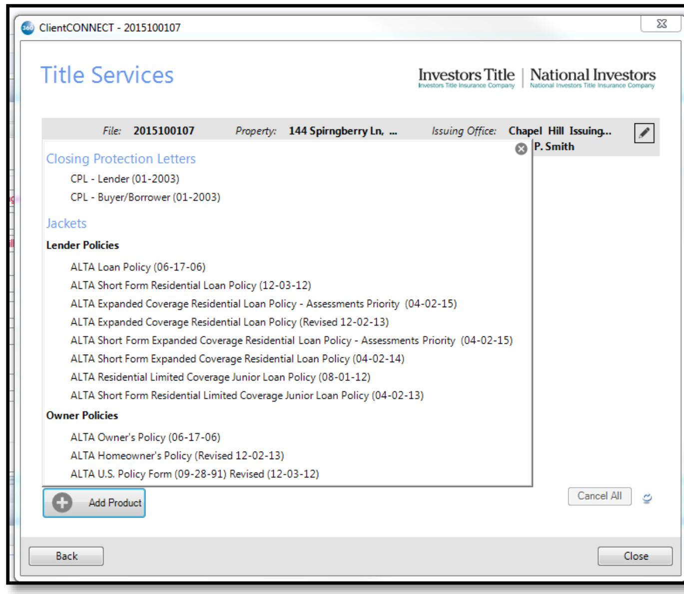
## Ordering a Jacket or CPL

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.

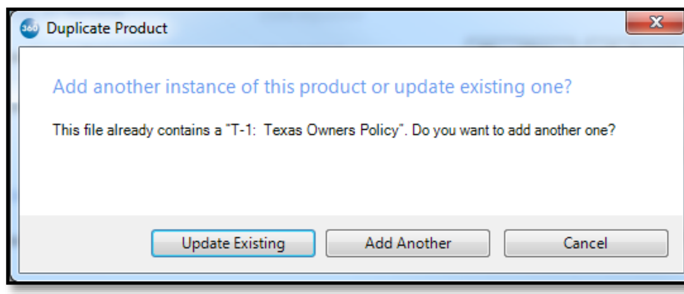
**NOTE**: The grouping and list of available products varies from jurisdiction to jurisdiction.

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.

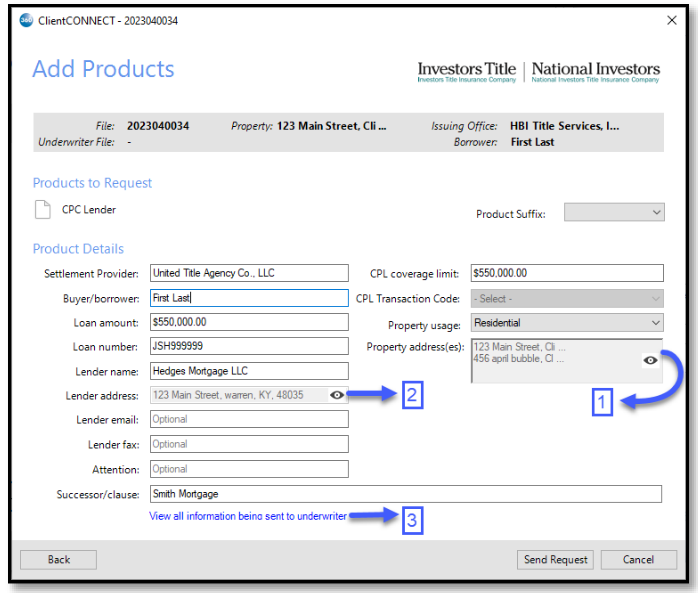



## Product Information Screens

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.



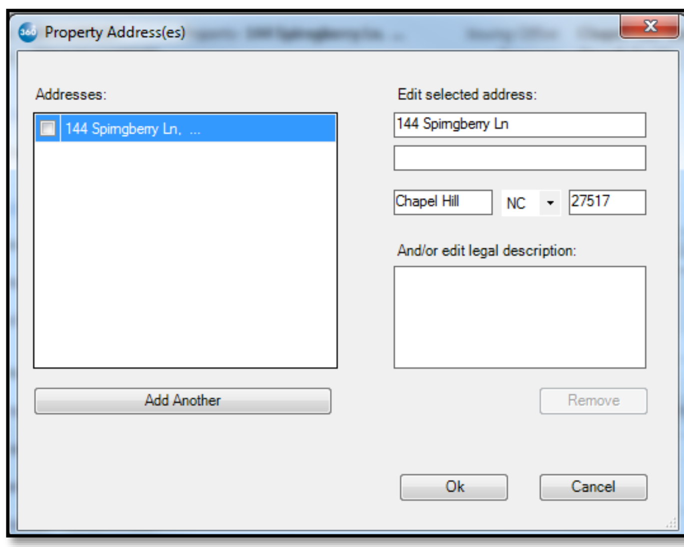

# Property Address(es) Screen

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.

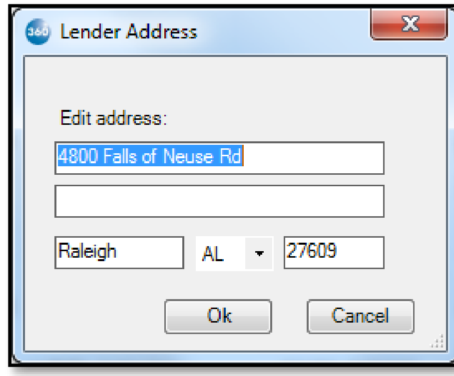
You can also add additional properties to be associated with the product being ordered.

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.



## Lender Address Dialog

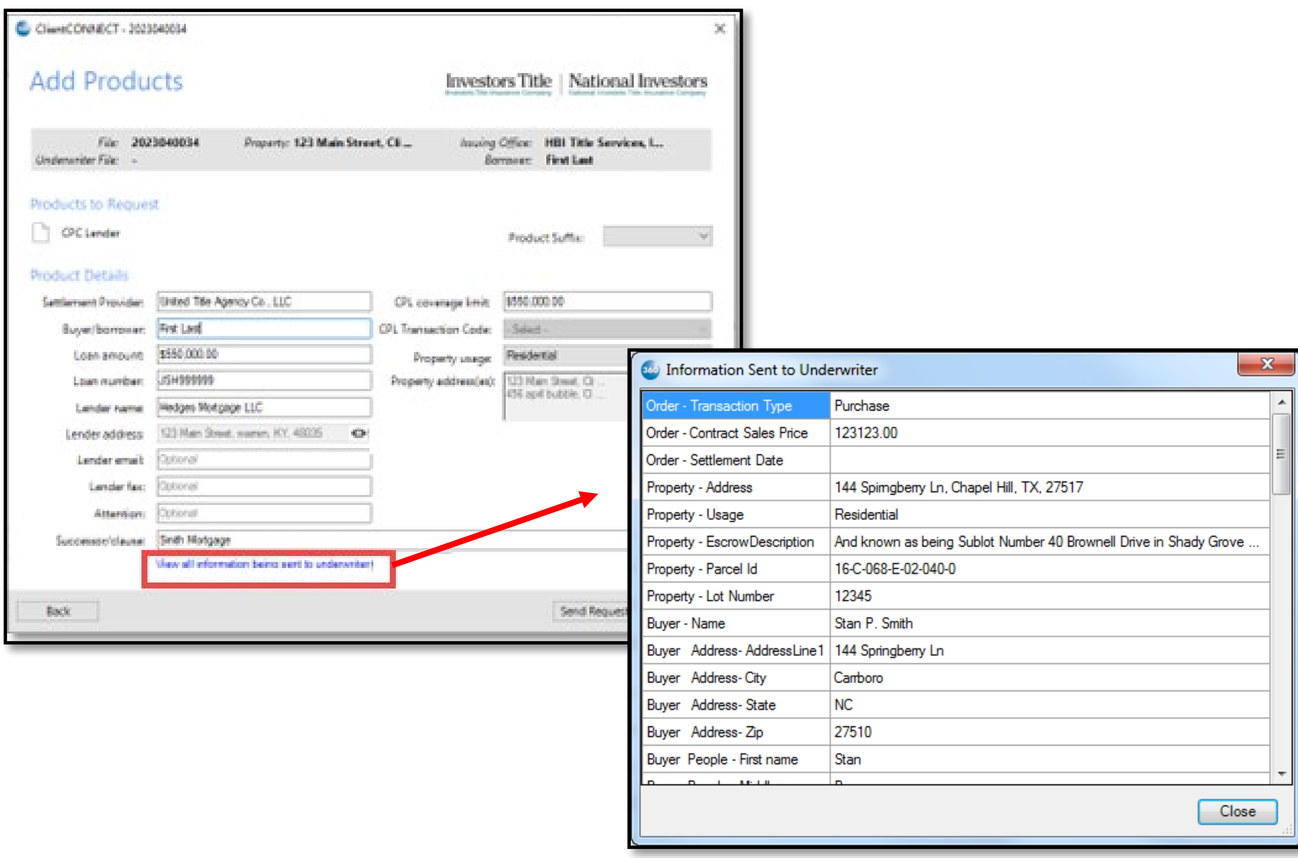



To review and adjust the Lender Address for the CPL, click on the **View** icon located to the right of the **Lender address** text box (shown on the image above as **Item 2**) The **Lender Address** dialog will allow you to edit the lender address information from your ProForm Order.

## 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.

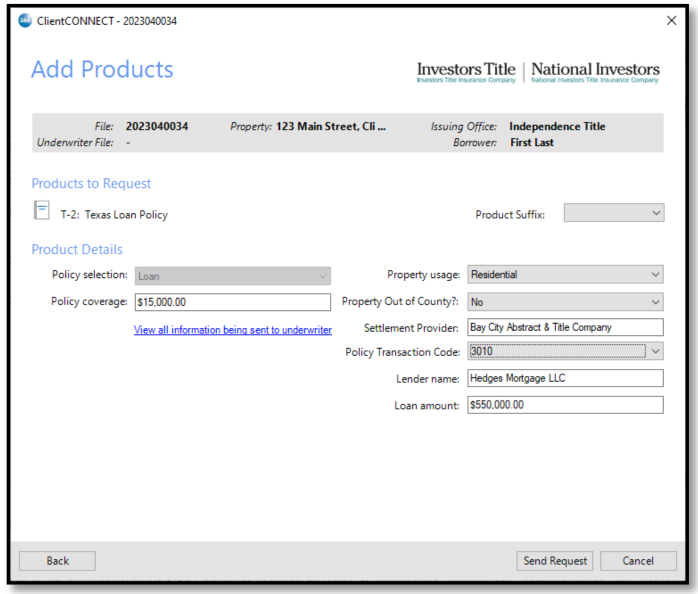


## Policy Jackets (Jackets) Add Products Screen

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.



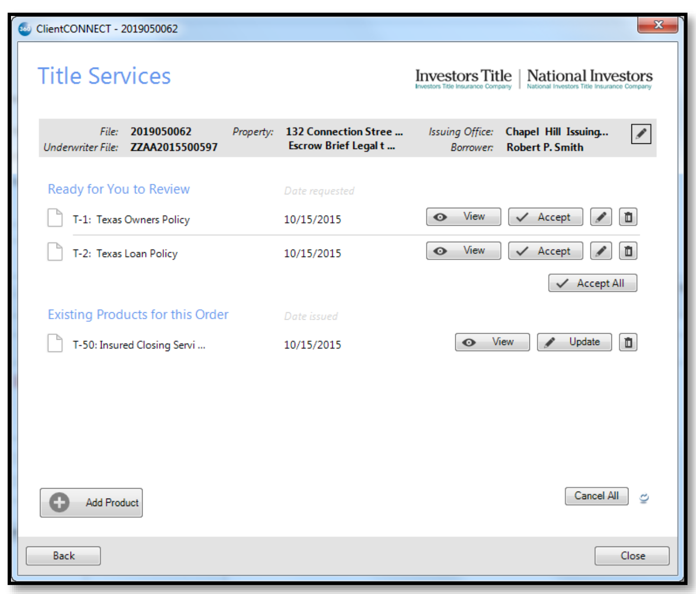

## Submitting Product Requests

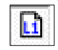
Once satisfied with the information contained on the **Add Product** screen, you may submit your request to National/Investors Title Insurance Company by clicking the **Send Request** button on the bottom right of the **Add Products** screen. This button will be enabled once all required information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

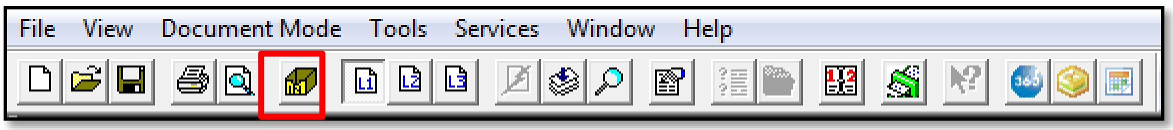
After a successful submission, you will be returned to the Title Services Screen.

## Accepting Product Request

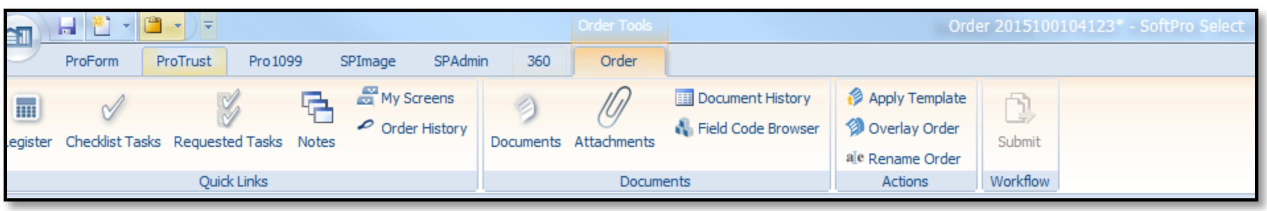
You may **Accept** the product into the order individually or as a group. You can accept the product into the order, by **clicking** the **Accept** button. Should you have multiple products to accept, you can click **Accept All** and all products that are ready to accept will be accepted into the ProForm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



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).

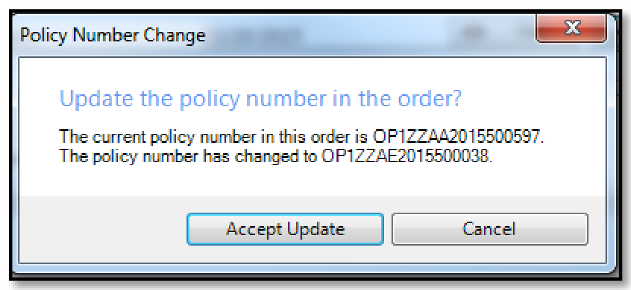



For Select users, the document(s) will be available by clicking the **Attachments** button located on the **Order** tab.



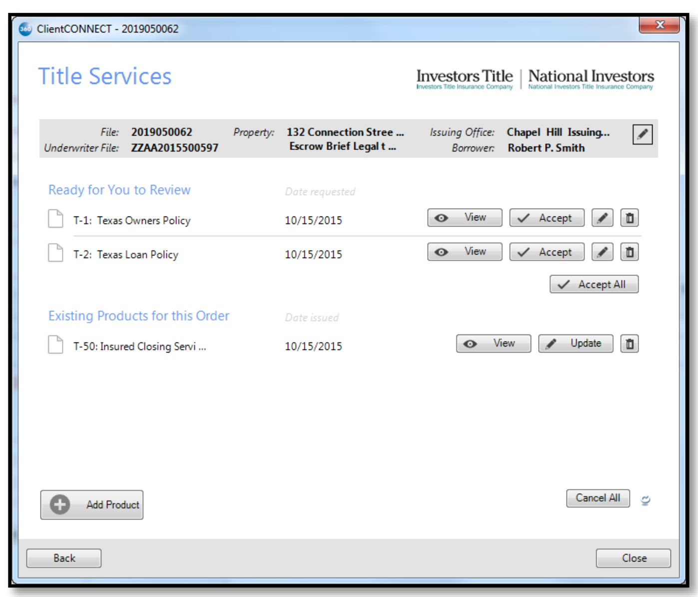

The accepted jacket number(s) will be available within the ProForm order in the Policy Number field(s). In the event the Policy Number of the policy in the ProForm order has a value and does not match the new policy number, you will be presented with the **Policy Number Change** dialog.

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.



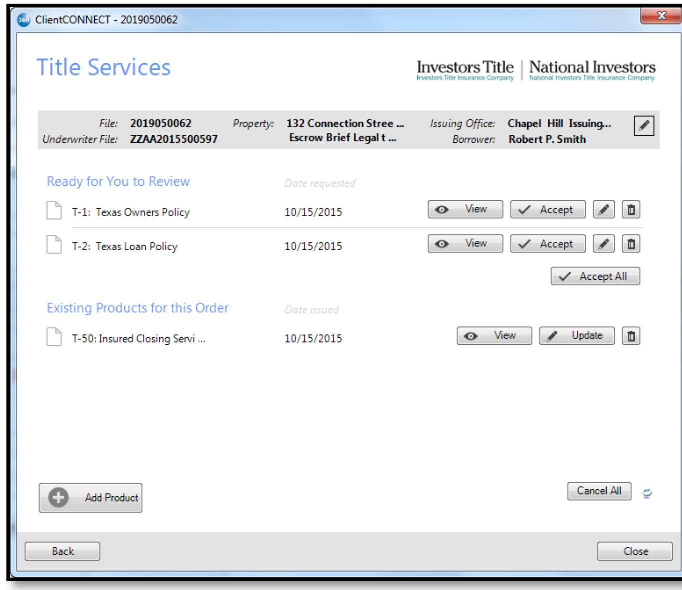

## Editing or Modifying a Product Request

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.

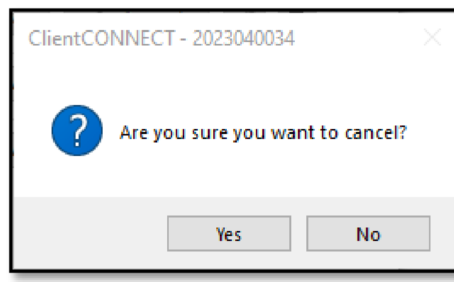


## Cancelling a Product Request

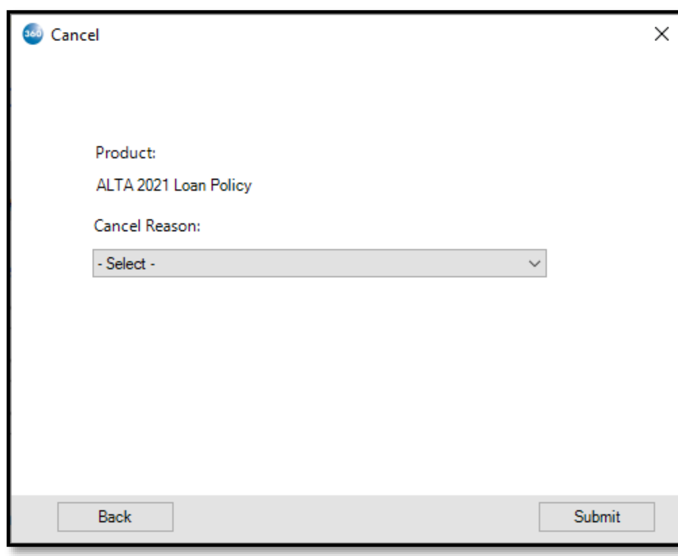
To void a specific product, after clicking the **Cancel** icon, you will be prompted to confirm the cancellation request. Click **Yes**, to proceed to the **Cancel Reason** screen, or **No,** to return to the **Title Services** screen.




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

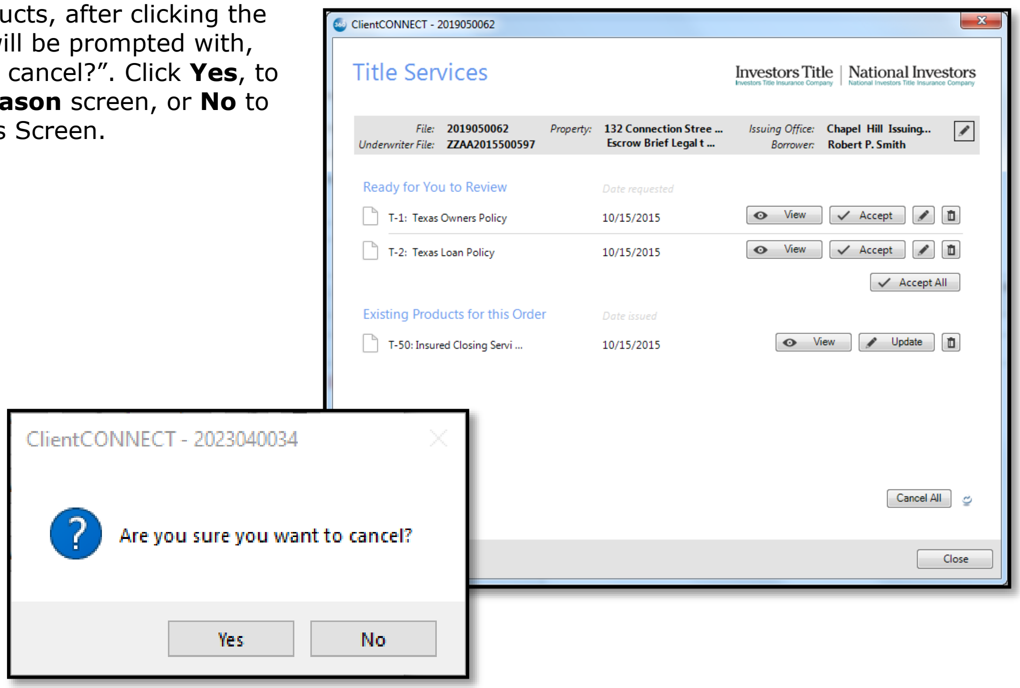



For Policy Jackets, you will be presented with a **Cancel** screen for a cancellation reason. Select a **Cancel Reason** returned by Investors Title. Click **Submit** to cancel the specific product to Investors Title.

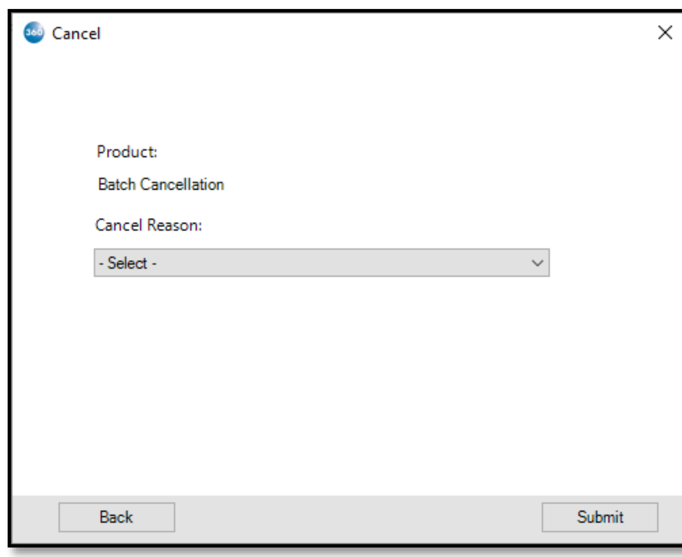


## Cancelling All Products

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.

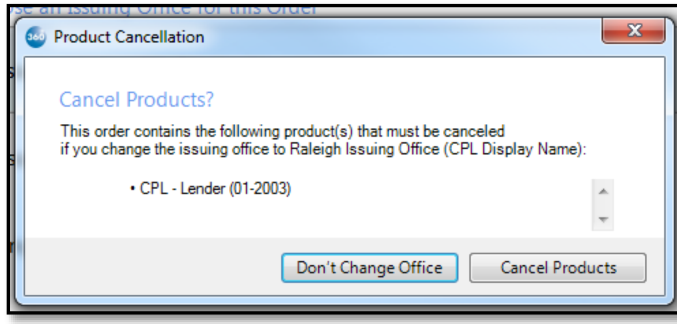



After clicking **Yes**, you will be presented with a **Cancel Screen** for a Batch Cancellation Reason. Select a Cancel Reason returned by Investors Title. The selected reason will be sent to Investors for each Policy Product requested. Click **Submit** to cancel the specific product to Investors Title.



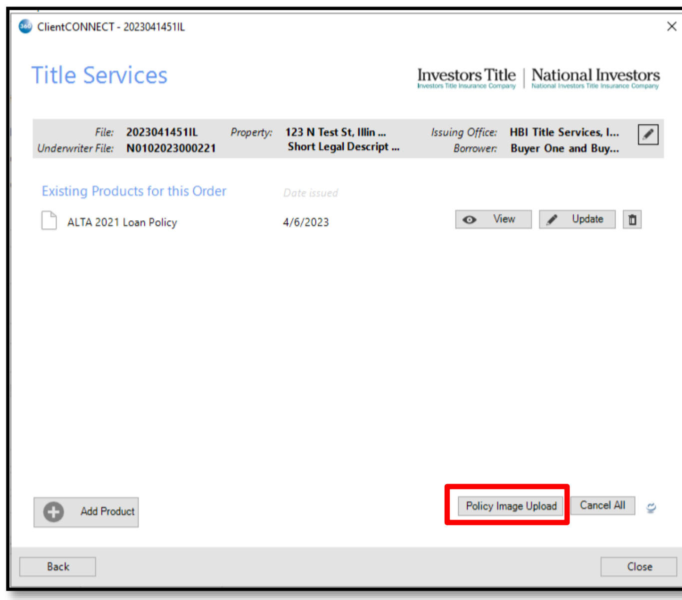
## Changing the Issuing Office After Products Have Been Ordered:

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

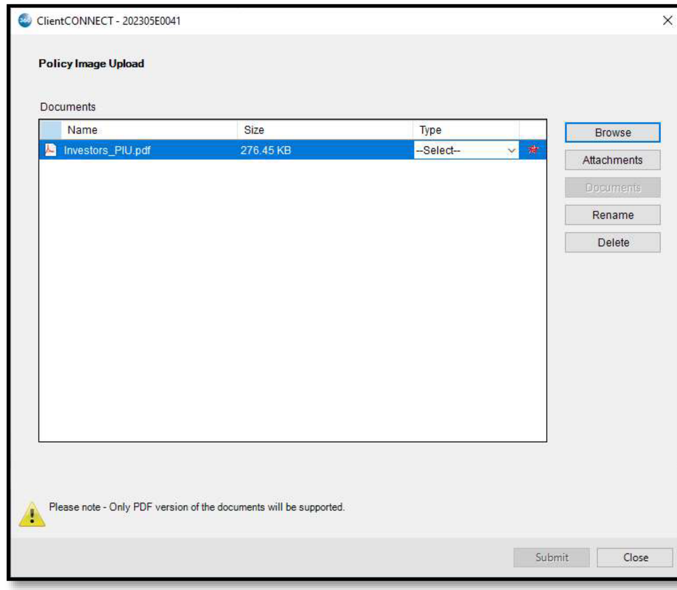
To send the Policy Image to Investors Title, use the **Policy Image Upload Button** on the **Title Services** screen. This button will be enabled when ALL Policy Requested are in the **ACCEPTED** status.




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


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.