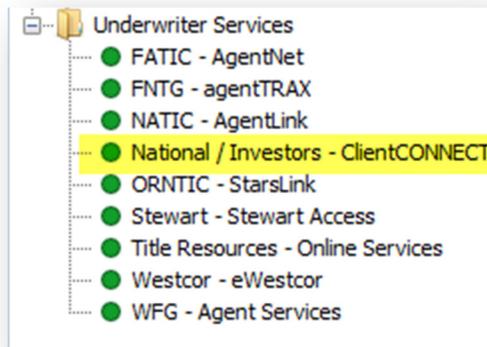


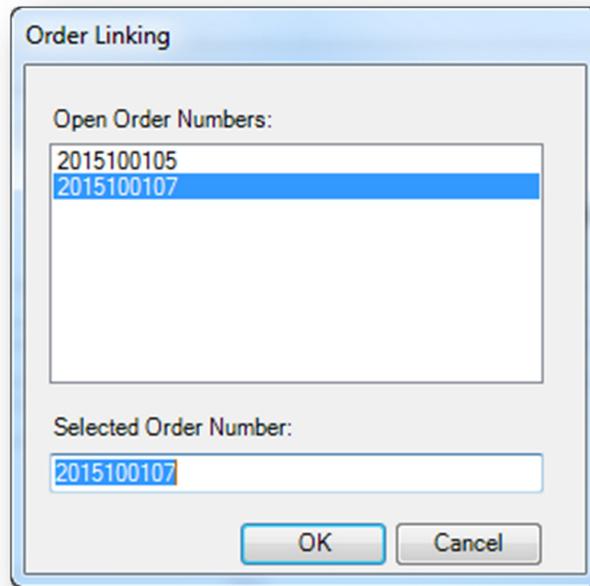
## Managing National/Investor's Title Insurance Transactions in SoftPro 360

### How to Submit a Transaction to National/Investor's Title Insurance

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

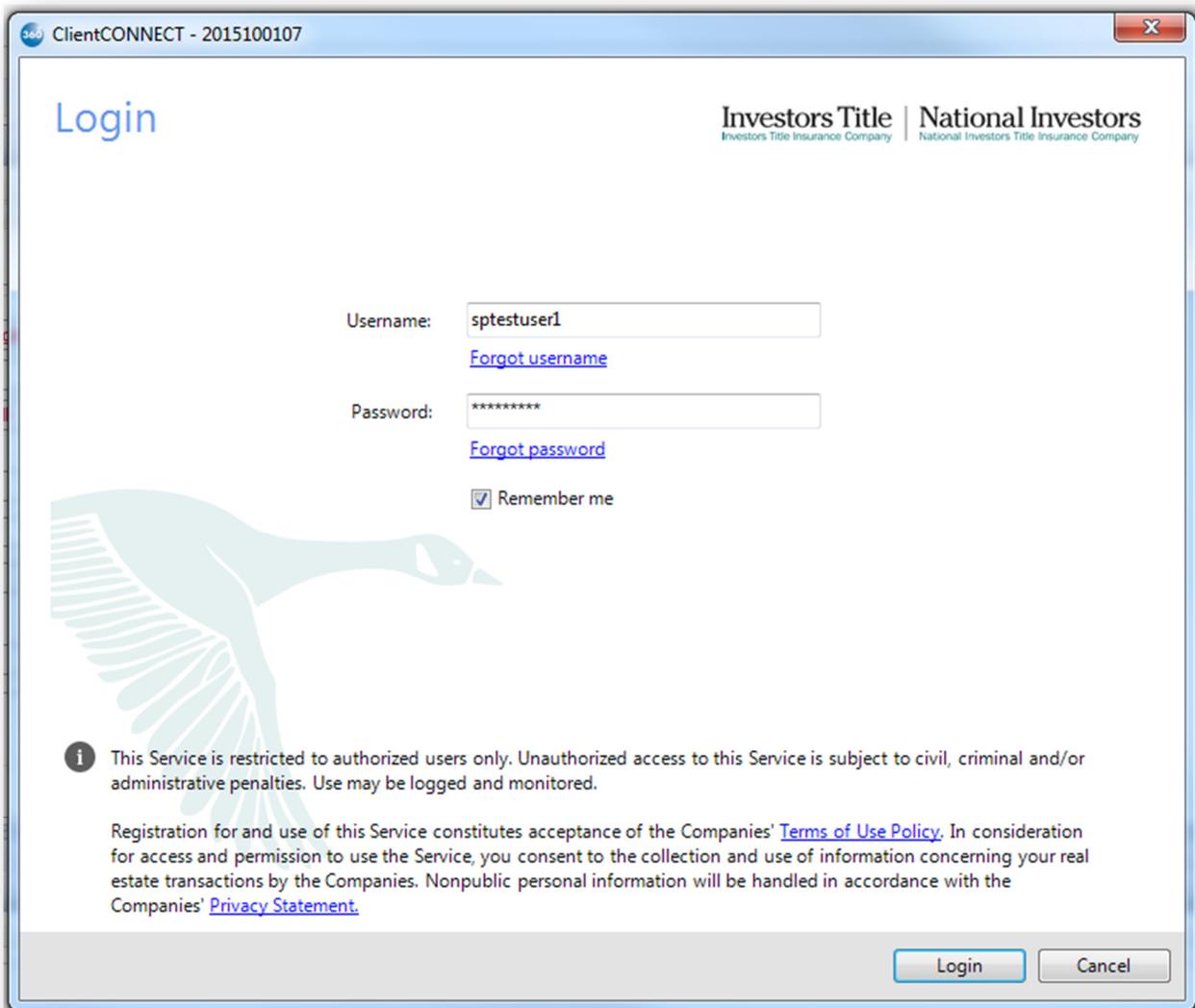


If a ProForm order(s) is opened, it will be listed in the Order Linking dialog. The active order will be highlighted and entered in the Selected Order Number field. Any of these open orders can be selected or the Selected Order Number field can be overwritten with an order that is not currently open.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



The Login screen requires an National/Investor's Title Insurance User ID and Password. The Property State must be entered within the ProForm order to log into National/Investor's 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 you launch the National/Investor's Title Insurance - ClientCONNECT service.



If credential assistance is needed you may Click on the blue links "Forgot username" or "Forgot password" to launch the National/Investor's Title Insurance Client Connect in your web browser where you may resolve authentication and access issues.

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

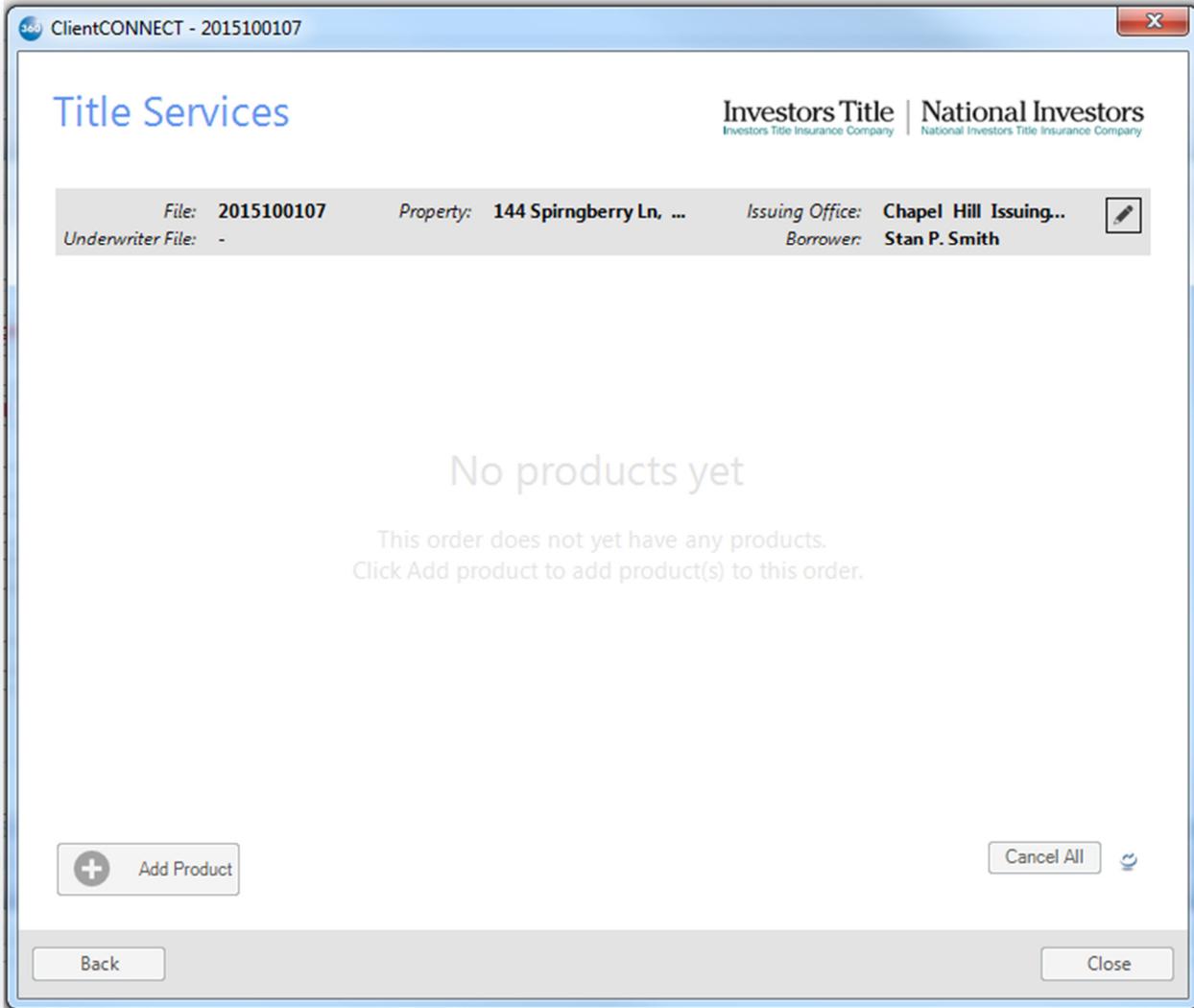
If your account has access to multiple Issuing Offices, you will be presented with the Issuing Office Screen. This Screen will display the available issuing offices in which can be used for your ProForm Order. Highlight the desired Issuing Office and **click Next** to continue.

The screenshot shows a software window titled "ClientCONNECT - 2015100107". The main heading is "Issuing Office". In the top right corner, there are logos for "Investors Title" and "National Investors". Below the heading, a grey bar contains the following information: "File: 2015100107", "Property: 144 Spingberry Ln, ...", "Issuing Office:", "Underwriter File: -", and "Borrower: Stan P. Smith". The main area is titled "Choose an Issuing Office for this Order" and contains a list of six options, each followed by "(CPL Display Name)": "Chapel Hill Issuing Office", "Fayetteville Issuing Office", "Raleigh Issuing Office", "Harrisonburg Issuing Office" (which is highlighted with a light blue background), "Roanoke Issuing Office", and "Richmond Issuing Office". At the bottom of the window, there are two buttons: "Back" on the left and "Close" on the right.

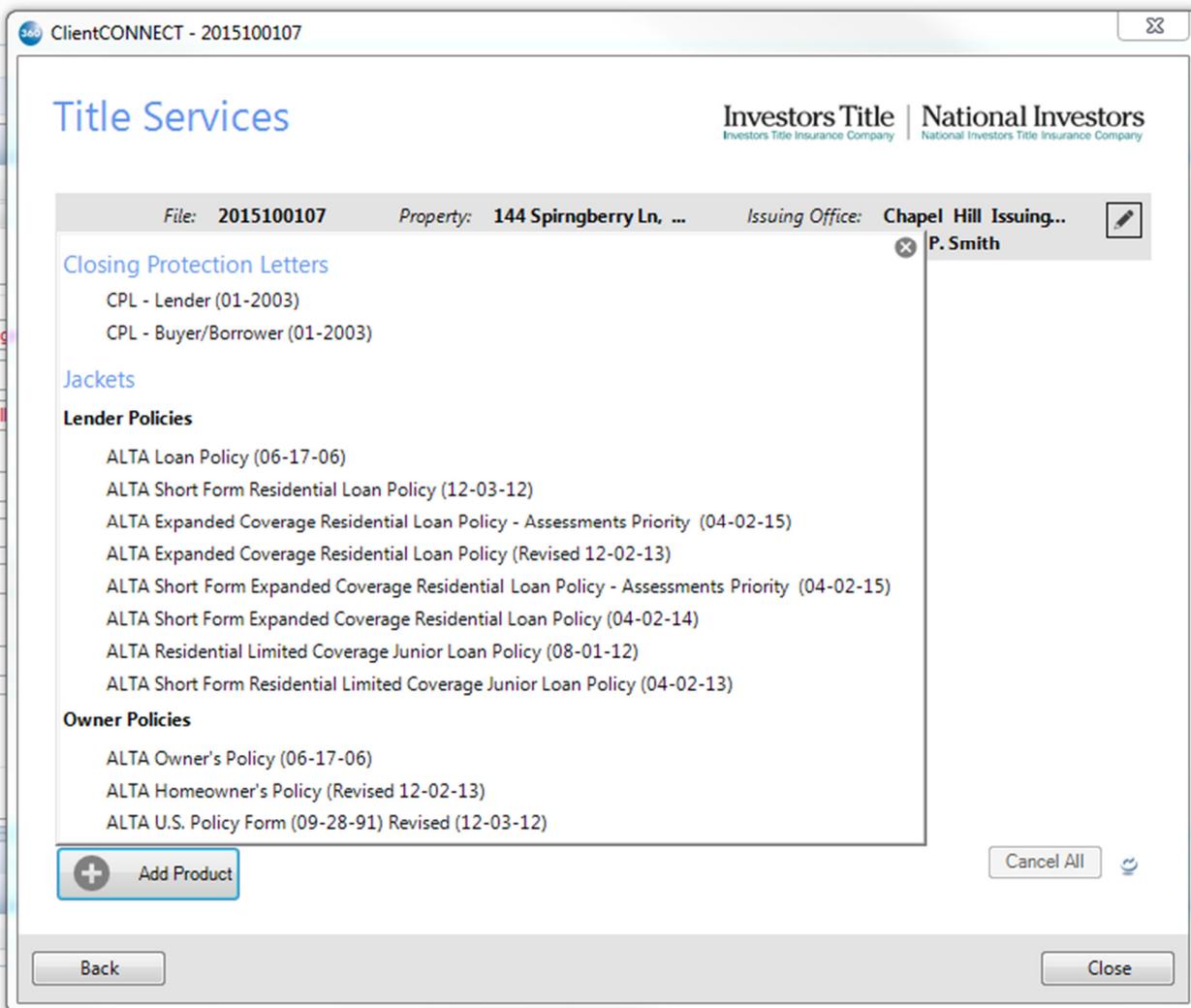
The Title Services screen shows the National/Investor's Title Insurance transactions that are associated with the linked ProForm order. To order an National/Investor's Title Insurance service, **click the Add Product** button.

## How to Submit a Request for Title Products to National/Investor's Title Insurance – ClientCONNECT

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

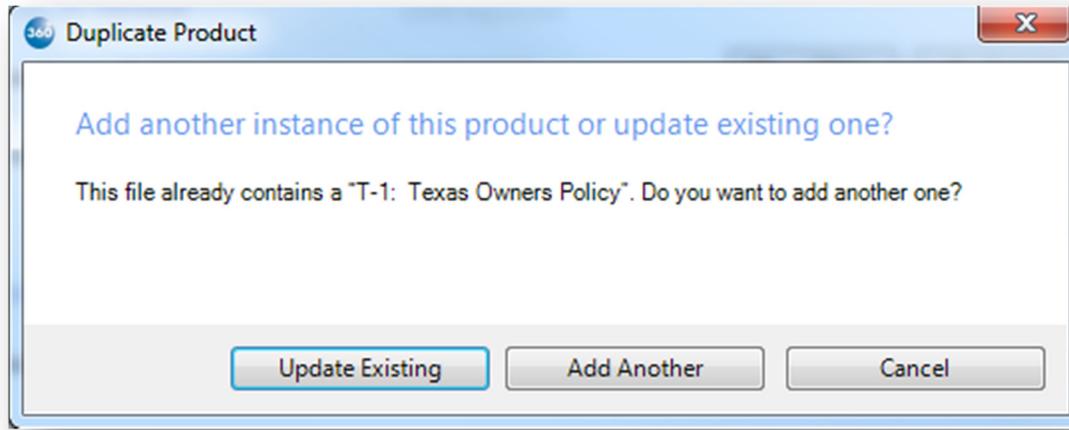


A list of available products will **popup** from the **Add Product** button. These product will be grouped by product type. Please note, the grouping and list of available products will vary from jurisdiction to jurisdiction.



Select the product you wish to order by **Clicking** on 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** the existing product or **Add Another** of that same CLIENTConnect product. You can also click **Cancel** to cancel the Add Product request.

## The 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 in which you have selected.

## Closing Protection Letters (CPL) Add Products Screen:

When ordering Closing Protection Letters (CPLs) you will be presented with a Add Products Screen with the necessary fields for the generation of the CPL:

ClientCONNECT - 2015100110

### Add Products

Investors Title | National Investors  
Investors Title Insurance Company | National Investors Title Insurance Company

File: 2015100110    Property: 144 Spingberry Ln, ...    Issuing Office: Harrisonburg Issuin...  
Underwriter File: ZZAD2015502857    Borrower: Stan P. Smith

#### Products to Request

T-50: Insured Closing Service - Lender

#### Product Details

Settlement Provider:	Bay Area Title Services, LLC	Property usage:	Residential
Buyer/borrower:	Stan P. Smith	Property address(es):	144 Spingberry Ln, ...
CPL coverage limit:	\$850,000.00	Loan number:	Optional
Loan amount:	\$123,456,978,777.00	Lender address:	4800 Falls of Neuse Rd, Raleigh, AL, 27601
Lender name:	Chase Manhattan Mortgage Corporation	Lender fax:	Optional
Lender email:	david.proctor@softprocorp.com	Attention:	Optional
Successor/clause:	ISAOA ATIMA		

[View all information being sent to underwriter](#)

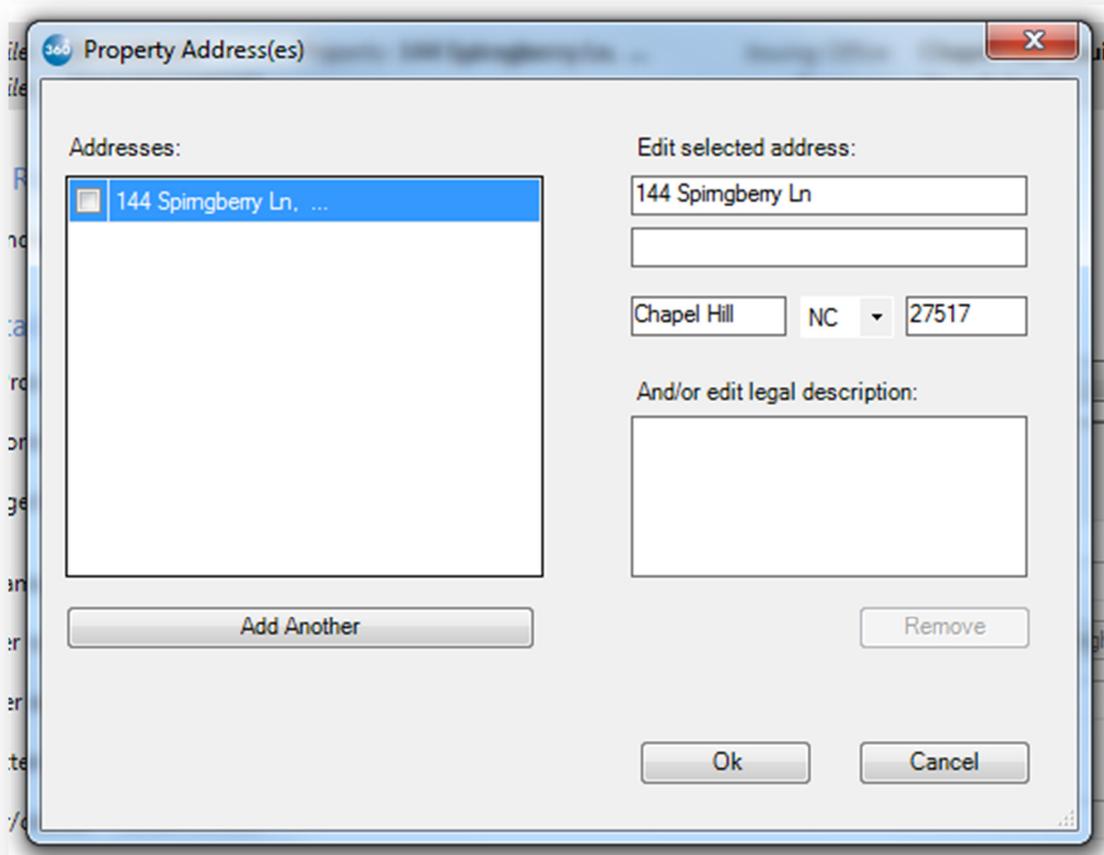
Back    Send Request    Cancel

## Property Address(es) Screen:

To access the Property Address(es) Screen, click on the Eye icon located on 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 Address(es) Screen.

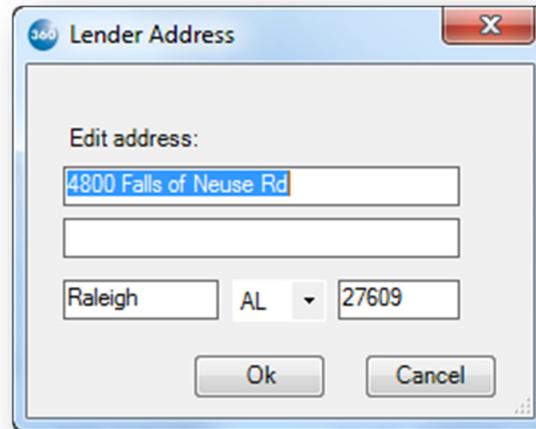
You can also add additional properties to be associated with the product being order. To add an additoinal property, **Click** the **Add Another** button.

You may enter the street address and/or legal description for the property.



## Lender Address Dialog:

To review and adjust the Lender Address for the CPL, click on the Eye icon located on 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.



The image shows a software dialog box titled "Lender Address". It contains a text input field with "4800 Falls of Neuse Rd" entered. Below it is another empty text input field. Underneath are three input fields: "Raleigh", "AL" with a dropdown arrow, and "27609". At the bottom are "Ok" and "Cancel" buttons.

## Additional Information Being Sent to Underwriter:

Along with the information contained in the Add Product Screen, National/Investor's Title Insurance will obtain additional information concerning the ProForm Order. To view the additional information being sent to National/Investor's Title Insurance Company, **click** on the blue link labeled "**View all information being sent to underwriter**" (shown on the image above as **Item 3**) You will be presented with a list of the data being transmitted with the product request.

Information Sent to Underwriter	
Order - Transaction Type	Purchase
Order - Contract Sales Price	123123.00
Order - Settlement Date	
Property - Address	144 Spimgberry Ln, Chapel Hill, TX, 27517
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 - 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

Close

### Policy Jackets (Jackets) Add Products Screen:

When ordering Policy Jackets (Jackets) you will be presented with a Add Products Screen with the necessary 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 dropdown will be enabled and will allow you to select the corresponding policy from your ProForm Order.

ClientCONNECT - 2019050062

## Add Products

Investors Title | National Investors  
Investors Title Insurance Company | National Investors Title Insurance Company

File: 2019050062    Property: 132 Connection Stree ...    Issuing Office: Chapel Hill Issuing...  
 Underwriter File: ZZAA2015500597    Escrow Brief Le ...    Borrower: Robert P. Smith

### Products to Request

T-2: Texas Loan Policy

### Product Details

Settlement Provider:	<input type="text" value="Bay Area Title Services, LLC"/>	Property usage:	<input type="text" value="Residential"/>
Policy selection:	<input type="text" value="Loan, \$123,131.00"/>	Lender name:	<input type="text" value="Wells Fargo Home Loans"/>
Policy coverage:	<input type="text" value="\$123,131.00"/>	Loan amount:	<input type="text" value="\$123,313.00"/>

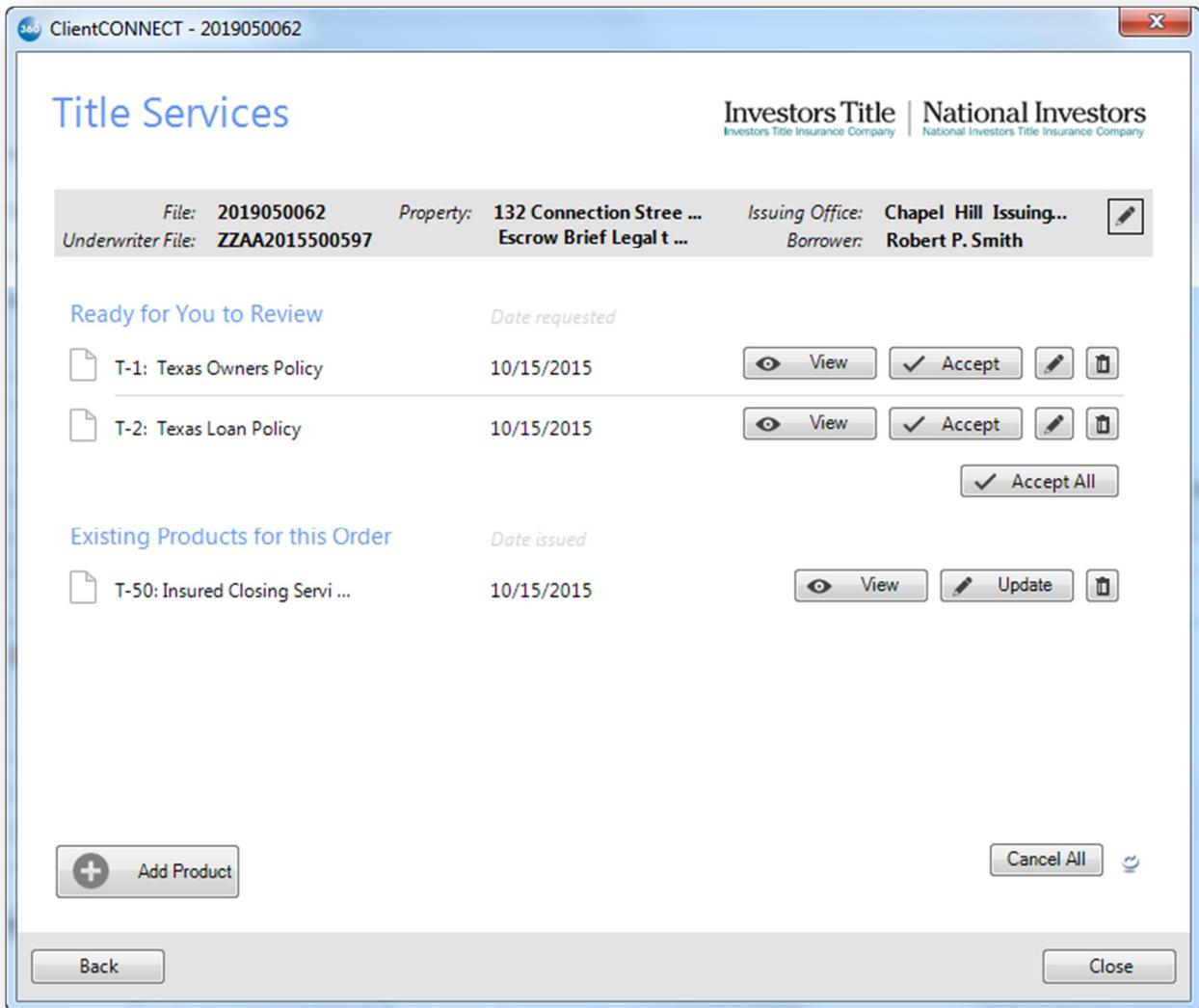
[View all information being sent to underwriter](#)

Back    Send Request    Cancel

### Submitting Product Requests:

Once satisfied with the information contained on the Add Product Screen, you may submit your request to National/Investor's 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 inputted into the Add Products Screen.

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



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.

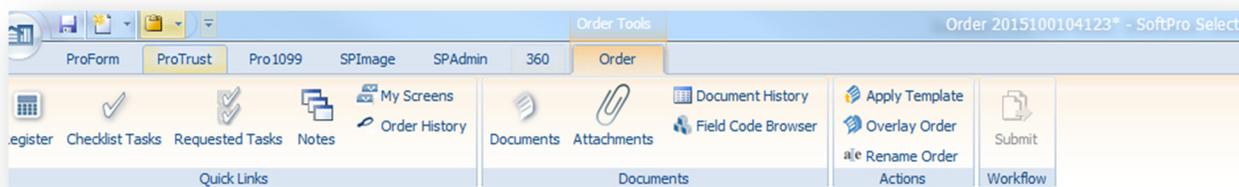
If you wish to **edit/modify** the product prior to accepting the product into the ProForm order you can do so by clicking on the **Pencil Icon** adjacent to the product.

If you wish to **cancel** or **void** the product, you can do so by clicking on the **Trashcan Icon** adjacent to the product. You can also cancel all products by **clicking** on the **Cancel All Button** located at the bottom right of the Title Services Screen.

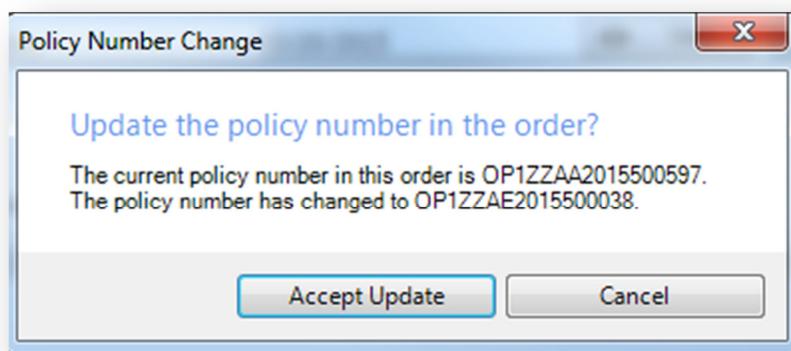
National/Investor's Title Insurance will return the Jacket(s) and CPL(s) promptly. When a product has been accepted into the ProForm Order, the document(s) will be available to all Standard and Enterprise users from within the ProForm order via the SPImage icon located on the ProForm Menu bar (a SPImage 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 on 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** on the **Accept Update Button** or you may hit **Cancel** to keep the current value.

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

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.

