



# Old Republic Closing Protection Letter 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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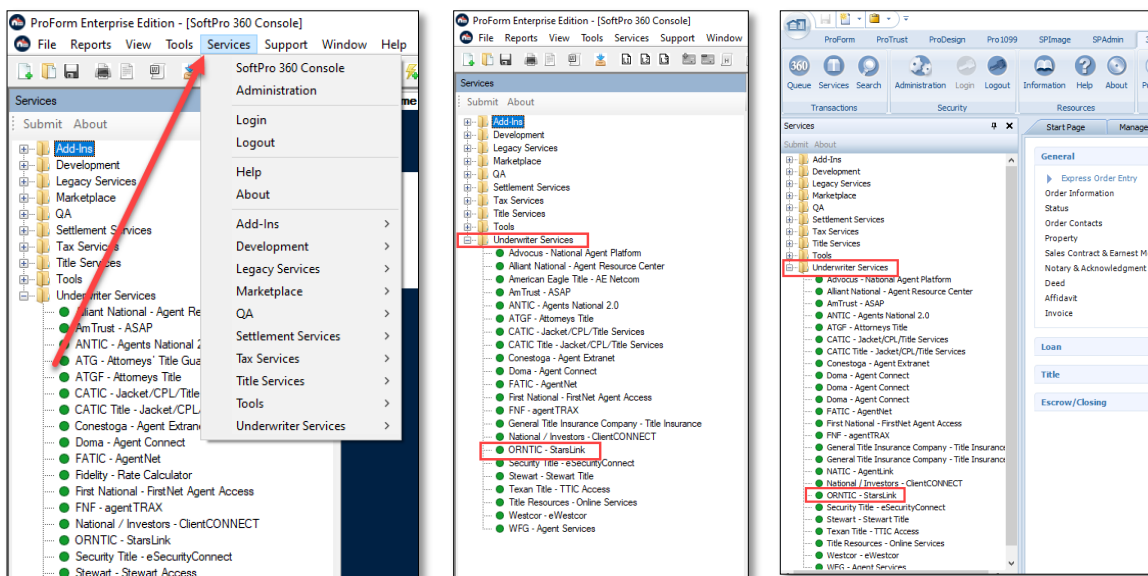
## Introduction

The Old Republic integration with SoftPro 360 will allow ordering of Old Republic products using the data within ProForm. SoftPro 360 will be able to create an Old Republic file corresponding to information in the ProForm order and enable ordering Policy Jackets along with CPLs through Old Republic. Additionally, users can update and void existing CPLs and Jackets. All available without having to leave the SoftPro workspace, helping to facilitate a more efficient workflow by reducing or eliminating the duplication of data.

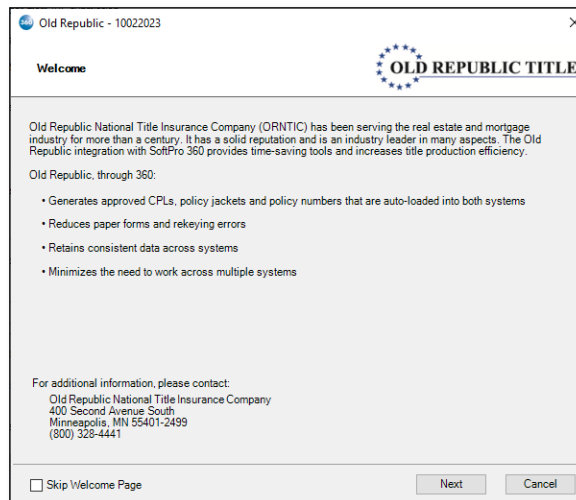
## Accessing Old Republic

From the Select toolbar:

1. Select the Services tab.
2. Click the Underwriter Services folder to expand.
3. Double-click **Old Republic**.



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





## Title Services Screen

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

- View a list of the CPLs and/or Policy Jackets that have been ordered.
- Order a CPL or Jacket.
- Void and issued product.
- View order data that has been sent to Old Republic.
- A table will display the products ordered from Old Republic and will provide the following information for each CPL and Jacket:

### Action:

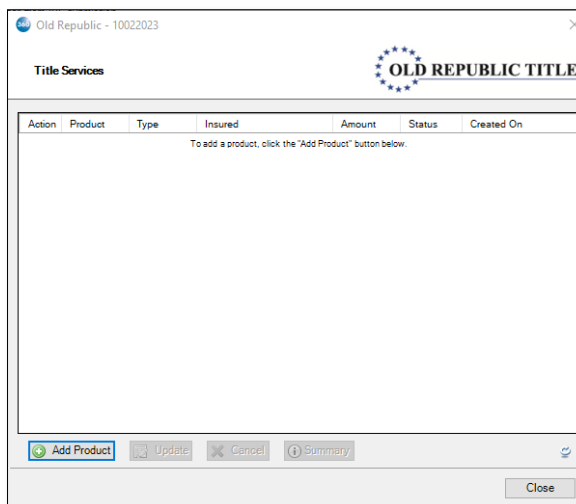
-  **Review**: 360 has received the CPL or Jacket from Old Republic (**Status = Ready**) and it is ready for the user to review and accept. Clicking the icon will display the **Review** screen, available options are review and accept the product.
- **Red Exclamation Mark** : The request submitted to Old Republic 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 Old Republic. For CPLs, the value will always be **Closing Protection Letter**. For Jackets, the value will always be **Policy Jacket**.

**Type**: Displays the type of product ordered. If CPL is requested, it will display the Selected Type (OH24).

**Insured**: Insured Party

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



**Status:**

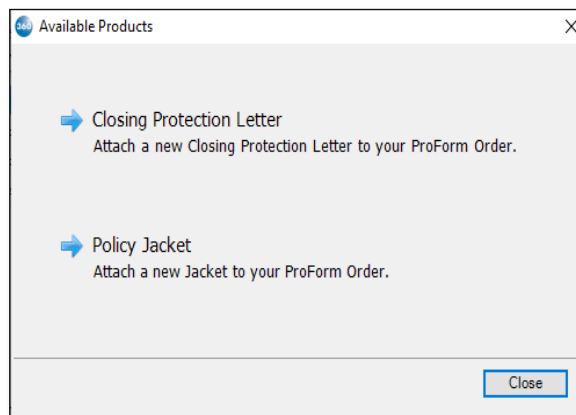
- **Ready:** 360 has received the remitted document from Old Republic and is ready for review and accept (attach to the order).
- **Completed:** The remitted product was accepted and attached to the order.
- **Rejected:** An error occurred with the submission of the request.
- **Canceled:** The product was voided.

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

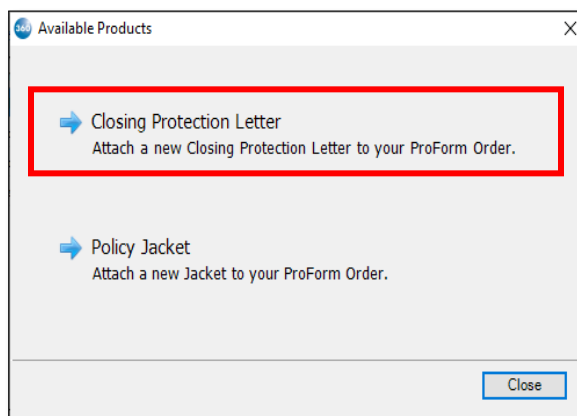
- To **sort** the data, click on a column heading. Click once to sort in ascending order and click again to sort in descending order.
- The **Add Product** button is available to order a CPL or Jacket, respectively.
- To **update** an issued product, highlight a transaction that is in **Completed** status and click the **Update** button.
- To **cancel** an issued product, highlight a transaction that is in **Completed** status and click the **Cancel** button.
- To view the order data that we are sending to Old Republic, click the File Information screen.

## Available Products Screen

- Select **Closing Protection Letter** to navigate you to the **Login** screen.
- Select **Policy Jacket** to navigate you to the **Property Information** screen.
- Click **Close** to return to the **Summary** Screen.



## Requesting a CPL



## Logging into Old Republic

- The **Login** screen requires to enter a valid Old Republic username and password.
- Check the “**Remember Me**” to login automatically when the Old Republic product launches in future sessions.
- Click **Login** to enter to the Old Republic Integration.
- Click **Back** to return to the **Welcome** Screen.
- Click **Cancel** to exit the Old Republic Integration.

## Closing Protection Letter Screen

- After CPL is selected, the **Closing Protection Letter** screen is displayed.
- Addressee
  - This dropdown will display available options returned from Old Republic; it will default to – Select.
  - Required
- Select the Type
  - This dropdown is dependent on the Addressee selection. The values are returned from Old Republic; it will default to – Select.
  - Required
- Pertains To:
  - To pull all buyers separated by and.
  - Required
- Property
  - To display 1<sup>st</sup> property listed in the ProForm Order.
- Include all of the Agency Branch Offices on this letter
  - Check this box to include all of the Agency Branch Offices on your letter request.
- Include Branch Office on this letter:
  - This dropdown will display available options returned from Old Republic.
- Click **Next** to continue to the **Selected Addressee** screen.
- Click **Cancel** to return to the **Summary** screen.
- Click **Back** to return to the **Login** screen.

## Additional Applicant Information Screen

If Additional Applicant was selected, Additional Application Information Screen will display next.

- Add'l Applicant
  - This dropdown will display all buyers and sellers listed in the ProForm order.
  - Once a selection is made, the Name, Address, Address 2, City, State and Zip will pull from that contact.
  - If multi person selected, the information will pull from the first person listed.
  - This is required.
- Name
  - To pull Name from Add'l Applicant selection.
  - Required
- Address
  - To pull Address 1 from Add'l Applicant selection.
  - Required
- Address 2
  - To pull Address 2 from Add'l Applicant selection.
- City
  - To pull City from Add'l Applicant selection.
  - Required
- State
  - To pull State from Add'l Applicant selection.
  - Required
- Zip
  - To pull Zip from Add'l Applicant selection.
  - Required
- Email
  - Check if you want to send email information.
  - To pull Email from Add'l Applicant selection.
- Attn
  - Check if you want to send Attn information.
  - To pull Name from Add'l Applicant selection.
- Fax
  - Check if you want to send Fax information.
  - To pull Fax from Add'l Applicant selection.
- Phone
  - Check if you want to send Phone information.
  - To pull Phone from Add'l Applicant selection.
- Click **Submit** to send the CPL Request to Old Republic.
- Click **Cancel** to return to the **Summary** screen.



- Click **Back** to return to the **Closing Protection Letter** screen.

## Borrower Information Screen

If Borrower was selected, Borrower Information Screen will display next.

- Borrower
  - This dropdown will display all buyers listed in the ProForm order.
  - Once a selection is made, the Name, Address, Address 2, City, State and Zip will pull from that contact.
  - If multi person selected, the information will pull from the first person listed.
  - If only 1 borrower, it will default to that borrower.
  - This is required.
- Name
  - To pull Name from Borrower selection.
  - Required
- Address
  - To pull Address 1 from Borrower selection.
  - Required
- Address 2
  - To pull Address 2 from Borrower selection.
- City
  - To pull City from Borrower selection.
  - Required
- State
  - To pull State from Borrower selection.
  - Required
- Zip
  - To pull Zip from Borrower selection.
  - Required
- Email
  - Check if you want to send email information.
  - To pull Email from Borrower selection.
- Attn
  - Check if you want to send Attn information.
  - To pull Name from Borrower selection.
- Fax
  - Check if you want to send Fax information.
  - To pull Fax from Borrower selection.
- Phone

- Check if you want to send Phone information.
- To pull Phone from Borrower selection.
- Click **Submit** to send the CPL Request to Old Republic.
- Click **Cancel** to return to the **Summary** screen.
- Click **Back** to return to the **Closing Protection Letter** screen.

## Buyer Information Screen

If Buyer was selected, Buyer Information Screen will display next.

- Buyer
  - This dropdown will display all buyers listed in the ProForm order.
  - Once a selection is made, the Name, Address, Address 2, City, State and Zip will pull from that contact.
  - If multi person selected, the information will pull from the first person listed.
  - If only 1 buyer, it will default to that buyer.
  - This is required.
- Name
  - To pull Name from Buyer selection.
  - Required
- Address
  - To pull Address 1 from Buyer selection.
  - Required
- Address 2
  - To pull Address 2 from Buyer selection.
- City
  - To pull City from Buyer selection.
  - Required
- State
  - To pull State from Buyer selection.
  - Required
- Zip
  - To pull Zip from Buyer selection.
  - Required
- Email
  - Check if you want to send email information.
  - To pull Email from Buyer selection.
- Attn
  - Check if you want to send Attn information.
  - To pull Name from Buyer selection.

- Fax
  - Check if you want to send Fax information.
  - To pull Fax from Buyer selection.
- Phone
  - Check if you want to send Phone information.
  - To pull Phone from Buyer selection.
- Click **Submit** to send the CPL Request to Old Republic.
- Click **Cancel** to return to the **Summary** screen.
- Click **Back** to return to the **Closing Protection Letter** screen.

## Lender Information Screen

If Lender was selected, Lender Information Screen will display next.

- Loan
  - This dropdown will display all loans listed in the ProForm order (a loan number must be listed in the loan information to display in the dropdown).
  - Once a selection is made, the Name, Address, Address 2, City, State and Zip will pull from that contact.
  - If multi person selected, the information will pull from the first person listed.
  - If only 1 loan, it will default to that loan.
  - This is required.
- Name
  - To pull Name from Loan selection.
  - Required
- Address
  - To pull Address 1 from Loan selection.
  - Required
- Address 2
  - To pull Address 2 from Loan selection.
- City
  - To pull City from Loan selection.
  - Required
- State
  - To pull State from Loan selection.
  - Required
- Zip
  - To pull Zip from Loan selection.
  - Required

Old Republic CPL - 10022023

**Lender Information Screen**

OLD REPUBLIC TITLE

Loan: JSH999999 Amount: \$875,000.00

Lender:

Name: [Redacted] \*

Address: 711 Tashanna Lane address 2  
Panama City FL 32409

Send to Lender Via:

☐ Email: Luis.Lenderson@test.com Attn: Luis Lenderson  
☐ Fax: ( ) - - Phone: (980) 399-6605

Back Next Cancel

- Email
  - Check if you want to send email information.
  - To pull Email from Loan selection.
- Attn
  - Check if you want to send Attn information.
  - To pull Name from Loan selection.
- Fax
  - Check if you want to send Fax information.
  - To pull Fax from Loan selection.
- Phone
  - Check if you want to send Phone information.
  - To pull Phone from Loan selection.
- Click **Next** to continue to the **Other Parties Information** screen.
- Click **Cancel** to return to the **Summary** screen.
- Click **Back** to return to the **Closing Protection Letter** screen.

## Other Parties Information Screen

If Lender was selected, Other Parties Information Screen will display next.

- Buyer
  - Check if you would like to send Buyer as Other Parties
  - Default to all buyer/borrower separated by and.
- Borrower
  - Check if you would like to send Borrower as Other Parties
  - Default to all buyer/borrower separated by and.
- Seller
  - Check if you would like to send Buyer as Other Parties
  - Default to all sellers separated by and.
- Add'l Applicant
  - Check if you would like to send Add'l Applicant.
  - Enter the Add'l Applicant to send with your CPL request.
- Click **Submit** to send the CPL Request to Old Republic.
- Click **Cancel** to return to the **Summary** screen.
- Click **Back** to return to the **Closing Protection Letter** screen.

## Seller Information Screen

If Seller was selected, Borrower Information Screen will display next.

- Seller
  - This dropdown will display all sellers listed in the ProForm order.
  - Once a selection is made, the Name, Address, Address 2, City, State and Zip will pull from that contact.
  - If multi person selected, the information will pull from the first person listed.
  - If only 1 seller, it will default to that seller.
  - This is required.
- Name
  - To pull Name from Seller selection.
  - Required
- Address
  - To pull Address 1 from Seller selection.
  - Required
- Address 2
  - To pull Address 2 from Seller selection.
- City
  - To pull City from Seller selection.
  - Required
- State
  - To pull State from Seller selection.
  - Required
- Zip
  - To pull Zip from Seller selection.
  - Required
- Email
  - Check if you want to send email information.
  - To pull Email from Seller selection.
- Attn
  - Check if you want to send Attn information.
  - To pull Name from Seller selection.
- Fax
  - Check if you want to send Fax information.
  - To pull Fax from Seller selection.
- Phone
  - Check if you want to send Phone information.
  - To pull Phone from Seller selection.
- Click **Submit** to send the CPL Request to Old Republic.

Old Republic CPL - 10022023

**Seller Information Screen**

OLD REPUBLIC TITLE

Seller: - Select -

Name: \*

Address: \*

Address 2:

City: \* State: \* Zip: \*

Send to Seller Via:

☐ Email: Attn:

☐ Fax: Phone:

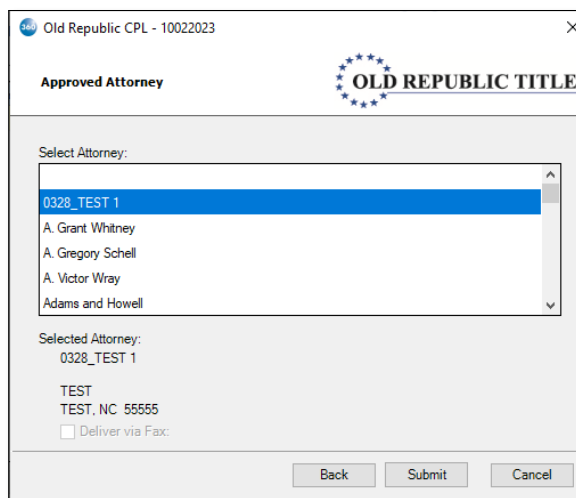
Back Submit Cancel

- Click **Cancel** to return to the **Summary** screen.
- Click **Back** to return to the **Closing Protection Letter** screen.

## Approved Attorney Screen

The Approved Attorney screen will allow you to select your default Approved Attorney from Old Republic. The selected attorney's contact information will display with the option to deliver via Fax, if available. If an Attorney in the list from Old Republic is present in the ProForm order, that Attorney will be selected by default.

- Click **Submit** to send the CPL Request to Old Republic.
- Click **Cancel** to return to the **Summary** screen.
- Click **Back** to return to the **Closing Protection Letter** screen.



Old Republic CPL - 10022023

Approved Attorney

OLD REPUBLIC TITLE

Select Attorney:

0328\_TEST 1

A. Grant Whitney

A. Gregory Schell

A. Victor Wray

Adams and Howell

Selected Attorney:

0328\_TEST 1

TEST

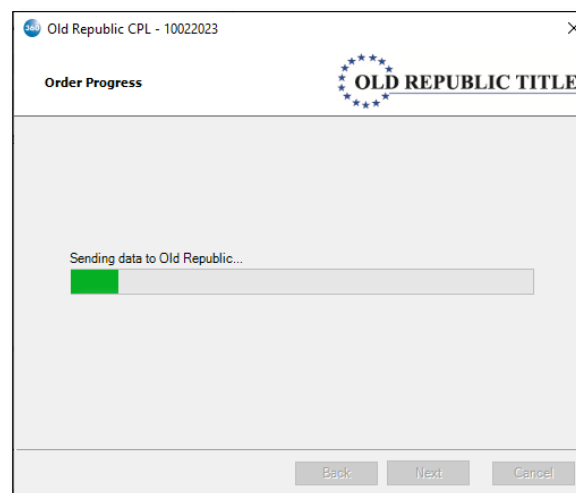
TEST, NC 55555

☐ Deliver via Fax:

Back Submit Cancel

## CPL Sending Page

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



Old Republic CPL - 10022023

Order Progress

OLD REPUBLIC TITLE

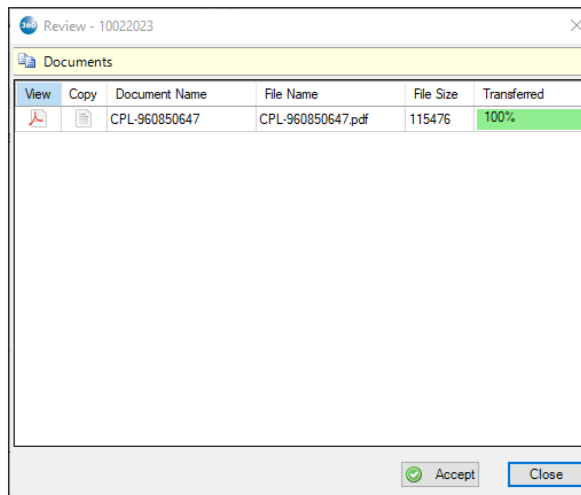
Sending data to Old Republic...

Back Next Cancel

## Reviewing CPL from Old Republic

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.

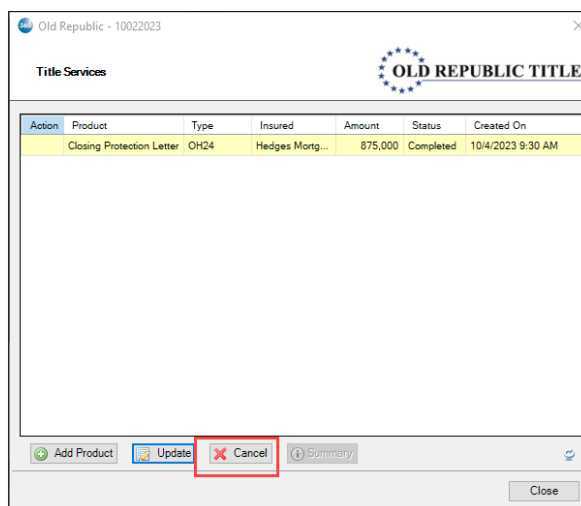
- Click Accept to import the documents into the corresponding order.



## Cancelling a CPL

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

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



- Upon click of the **Cancel** button, you will be prompted “Are you sure you to want to cancel this Closing Protection letter’?
  - Click **Yes** to send the cancel request to Old Republic .
  - Click **No** to return to the **Summary** screen.
- Once the void has been sent to Old Republic, 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.
  - Upon click of the **Update** button, you will be taken through the CPL Workflow.

