

- 4800 Falls of Neuse Road, Suite 400
- Raleigh, NC 27609
- Sales & Service: 800-848-0143
- Email: sales@softprocorp.com
- Web: www.softprocorp.com

Managing WFG National Title Insurance Company Transactions in SoftPro 360

How to Submit a Transaction

WFG National Title Insurance Company, an underwriter that issues Closing Protection Letters and Jackets can be found in the SoftPro360 Services menu under Underwriter Services.



If you already have ProForm Order(s) open, they will be listed in the **Order Linking** dialog. The active order will be highlighted and entered in the **Selected Order Number** field. You have the ability to select from any of these orders, or you may choose to overwrite the **Selected Order Number** with an order that is not currently open. Click **OK** to continue.

Order Linking		
Open Order Numb	ers:	
CD-201804121		
CD-201004121		
Selected Order Nu	mber:	
CD-201804121		
	OK	Cancel



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The Welcome screen provides you with information about **WFG National Title Insurance Company**. You may choose to skip this screen in the future by clicking on the **Skip Welcome Page** option. Click **Next** to continue.

Welcome		WFG Nation	al Title Insurance ton Financial Group company
As part of WFG's co excited to announc service allows Age existing software; t estate transactions.	mmitment to collaborate wit e our eJackets Web Service nts to generate eJackets and thereby eliminating duplicate	h our customers at every opportu along with the existing e-CPL We CPLs quickly and seamlessly wit data entry, and reducing time and	nity, we are b Service. This hin their I cost of real
The Williston Financial real estate transact required to close a loar integrated technologies processes. WFG incre- costly hierarchical orga	Group family of businesses (WFG tions. By focusing on the client and/or transfer real property ow s. WFG provides efficient high qu ases closing rates. By minimizing o nrization.	are dedicated to taking time a and their processes, WFG compres nership. By empowering industry pr ality products and services. By ena corporate infrastructure, WFG avoit and the service of the service of the service of the service of the corporate infrastructure, WFG avoit the service of the service	nd cost out of ses the time ofessionals with bling client ds operating a
For additional information	tion, please contact: cup Ste 350		
Villiston Financial Gro 12909 SW 68th Pkwy, Portland, Oregon 9722 (877) 840-0841	23		

The Login screen requires you to enter your User ID and Password provided by **WFG National Title Insurance Company**. The **Remember me** check box will allow you to automatically login the next time you launch this product. Click **Next** to continue.

🥯 WFG - CD-201804121	×
Login	WFG National Title Insurance Company withing Function
	Provide your account information. User ID: CplWebTestAcct
	Password:
Request WFG Access	
	Back Next Cancel



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The **Title Services** screen will show all **WFG National Title Insurance Company** transactions related to this order. To order a product, click the green **Add Product** icon.

WFG - Ti	CD-2018041	21		(WFG Nat	ional Title Insurance Comp William Financia (Group company
Action	Product	Туре	Insured	Amount	Status	Created On
			To add a product, click th	e "Add Product" button bek	ow.	
💿 A	dd Product	Edit / Vi	ew			ç
				Back		Close

How to order a Closing Protection Letter

To order the Closing Protection letter click the **Closing Protection Letter** on the **Available Products** screen.

🥯 WFG -	CD-201804121 X
Av	railable Products
-	Closing Protection Letter Attach a new Closing Protection Letter to your ProForm order.
→	Jacket Attach a new jacket to your ProForm order.
	Close

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🥯 WFG - Closing Protectio	n Letter - CD-201804121		×	
Closing Protection	Letter / NC	WFG National Title Insurance Compu a Willisten Flauxial Group company		
Select Letter Type:	Transaction \vee	Loan Number: 0417	2017 ~	
Transaction Amount:	400000			
Borrowers:	Cookie Monster			
Property Address:	378 Sunflower St Raeford, NC 28376			
		Next	Cancel	

The Lender Selection screen will show the Lender information from your ProForm Order. Check to indicate if you want to send the letter to the Lender via Fax or Email and choose your Lender Clause. Click Next to continue.

WFG - Closing Protection Letter - CD-201804121		×
Lender Selection	WF	G National Title Insurance Company a Willister Financial George company
Selected Lender:	Attn:	ITEST SoftPro Lender Demo
ITEST SoftPro Lender Demo CI 1	Phone:	(999) 999-9999
20E Greenway Plaza	Fax:	<u> </u>
Houston TX 77046	Email:	
Send to Lender Via Fax Send to Lender Via Email		
Lender Clause: its successors and/or assigns		~
Ba	ck	Next Cancel

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The Attorney screen will allow you to select your Attorney from the list provided by **WFG National Title Insurance Company**. Once you have selected the attorney then click **Submit**.

WFG - Closing Protection Letter - CD-201	804121 ×
Approved Attorney Selection	WFG National Title Insurance Company Willing Francial Goog company
Select Attorney:	1888 Results Returned
Your Agency A. Chance Wilkinson A. Gregory Schell A. L. Collins A. L. Collins A. Travis Ellis Aaron B. Anderson Abbie Baynes	~
Selected Attorney:	Send to Attorney Via Fax
, NC	agencysupport@wfgnationaltitle.com
	Back Submit Cancel

Your data will be sent to WFG National Title Insurance Company.

🥯 WFG - Closing Protection Letter - CD-20180	4121 ×
Order Progress	WFG National Title Insurance Company a Wilson Francia Group company
Sending data to WFG	
	Back Next Cancel



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WFG National Title Insurance Company will immediately return the Closing Protection letter. The Review Transaction screen allows you to View or Copy the document(s). Click Accept to add the document to your ProForm Order. The document(s) will be available to you via the Attachments icon located on the Order ribbon. The Close button will close the Review Transaction screen.

Review Closing Protection Letter(s)					
Documents					
/iew	Сору	Document Name	File Name	File Size	Transferred
۶.		CPL_7e1f3769	CPL_7e1f3769.pdf	53185	100%

The Closing Protection letter will now appear in the **Title Services** screen. From here you can **Add Product, Edit/View** the letter, Go **Back**, or **Close**.

WFG -	CD-201804121			6			×
т	itle Services				WFG Natio	nal Title Insurance Con listor Financial Group company	npar
Action	Product	Туре	Insured	Amount	Status	Created On	
	Closing Protection Letter	Transaction	Cookie Monster	400,000	Completed	5/4/2018 10:51 AM	
۵ ک	dd Product Edit / V	liew					с)
				Back		Close	

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How to order a Jacket

To order a Jacket click Jacket on the screen.

Availa	ble Products		WFG Natio	nal Title Insurance C listor Financial Group company
I Cl Att	osing Protection L ach a new Closing Prot	etter ection Letter to	o your ProForm (order.
s 🔶 Ja Att	cket ach a new jacket to yo	ur ProForm ord	ler.	

This will allow you to select the **Jacket** to be issued. The selection will auto populate based on the type of policy shown in the ProForm Order. (Simultaneous/Lender/Owner/Other). Verify your selection and click **Next** to continue.

🥯 WFGJacket - CD-201804121	×
Jacket Selection	wWFG National Title Insurance Company
Select	the Jacket to be Issued:
	Simultaneous
	◯ Lender
	First Loan 🗸
	O Owner
	◯ Other
	Back Next Cancel



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The Jacket Type Selection screen will allow y	you to select	the type of Ja	acket. The op	tions provided are
based on your account. Click Next to continue.				

🐵 WFGJacket - CD-201804121	×
Owner	WHG National Title Insurance Company William Prawad Group company
ALTA Homeowner's Policy ALTA Homeowner's Policy (2013)	
	Back Next Cancel

Based on the type of jacket you select, the **Jacket Information** screen will display applicable information from your ProForm Order. Any additional required information will show a red asterisk * indicating you need to add the information to proceed. Also based on the jacket selection, you may need to select endorsements to associate with the jacket. Click **Next/Submit** to continue.

🥯 WFGJacket - CD-20180	4121	×	🥯 WFGJa	cket - CD-2018041	21			×
Owner Jacket Inform	nation	WFG National Title Insurance Company # Williams Franced Group company	Owne	r Endorsements :	Included with Policy	WFG Natio	onal Title Insu: Illiston Financial Group o	rance Company
ALTA Owner's Policy			ALTA	Owner's Policy				
Name	Value	^	Searc	h Endorsement			Dieplay All	~
FileNumber	CD-201804121						Dispidy / 4	
GrossPremium	0.00		[Description		Endorsem	entCharge	^
InsuredNames	Cookie Monster			IC CPL				
LiabilityAmount	500,000.00		🗆 N	IC Commitment		15.00		
OtherInfoFieldCaption1				oning-Completed Str	ucture	0.00		
OtherInfoFieldCaption2				oning-Unimproved L	and	0.00		~
OtherInfoFieldCaption3								
OtherInfoFieldCaption4			Endo	orsements in ProForm	n Order			Charge
OtherInfoFieldCaption5								
PolicyDate		*						
PolicyTime		¥						
		Back Next Cancel			В	ack Ne	ext	Cancel



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FG - Closing Protection Letter - CD-20180412		
Order Progress	WFG National Title Insur a Willides Financial Group of	rance Company
Sending data to WFG		

Your data will be sent to WFG National Title Insurance Company.

WFG National Title Insurance Company will immediately return the jacket(s). The **Review Transaction** screen allows you to view the document(s) and jacket number(s) that are returned. Click **Accept** to add the document(s) and jacket number(s) to your ProForm Order. The document(s) will be available to you from within your ProForm Order via the Attachments icon located on the Order ribbon.

The Close button will close the Review Transaction screen.

Note: You also have the ability to not accept the Policy numbers in the Data section by ¹ unchecking the box or editing the values brought in by clicking the ² edit icon.

🚳 Rev	iew - C[0-2018	04121						×
😴 Sele	ct All =	=) Sele	ct None	Field Code	5				
Gro	oups	C	Data					(2
All			Nar	me	Current Value		New Va	alue	
Loa	ner Polic an Policy	y [Own	ner Policy			315540	0-03442465	
	,		Loar	n Policy			316560	0-03442466	
	cument	s							
	View	Сору	File Na	me		Fil	e Size	Transferred	
	~		OwnerP	olicy-3155400-034	142465.pdf	31	3428	100%	
	1		LoanPo	licy-3165600-0344	2466.pdf	18	7721	100%	
					Accept	0	Reject	Clo	se



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The Jacket will now appear in the Title Services window. From here you can **Add Product, Edit/View**, Go **Back** or **Close**.

WFG -	CD-201804121					
Т	itle Services				WFG Natio	nal Title Insurance Comp Iistee Financial Group company
Action	Product	Туре	Insured	Amount	Status	Created On
	Closing Protection Letter	Transaction	Cookie Monster	400,000	Completed	5/4/2018 10:51 AM
	Jacket	Simultane	378 Sunflower		Completed	5/4/2018 11:28 AM
	dd Product Edit / V	fiew				ç