

Westcor Dual CPLs & Policy Jackets User Guide

June 2024

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Table of Contents

History.....	4
Accessing Westcor	5
Logging into Westcor	6
Creating a Westcor Base Order	7
Ordering a Closing Protection Letter	7
Ordering a Policy Jacket	9
Endorsements	10
Updating a Jacket.....	11
Canceling a CPL or Jacket	12
Sending Updated Order Information to Westcor	12

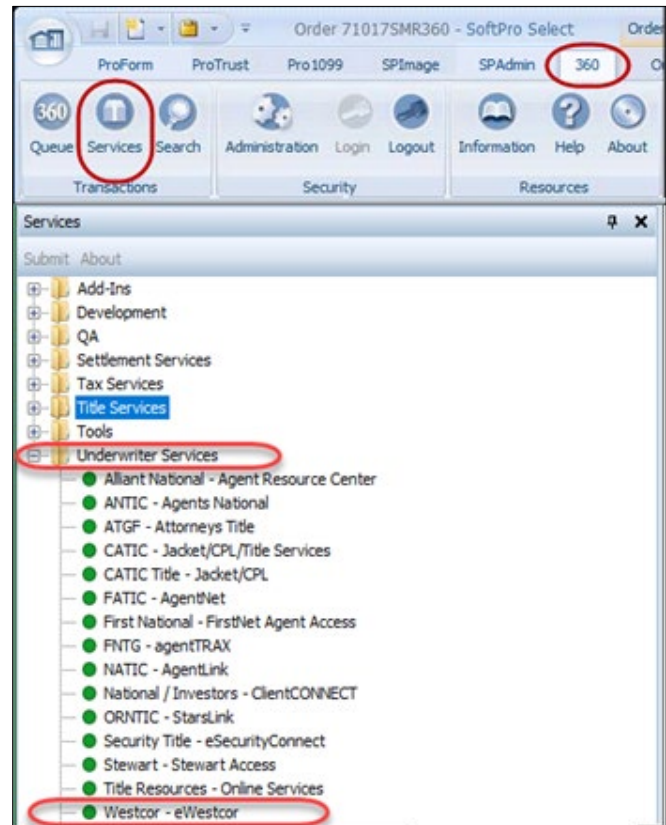
History

Date	Version	Details
April 2024	2.1	<p>In this release,</p> <ul style="list-style-type: none">- Logo updated- Property link added to Title Services- Updated Agent Number selection to include additional information in grid format- Endorsements<ul style="list-style-type: none">○ Matching ProForm○ Ability to enter remittance value○ Suggested premium shown for endorsements
June 2024	2.1	History grid added

Accessing Westcor

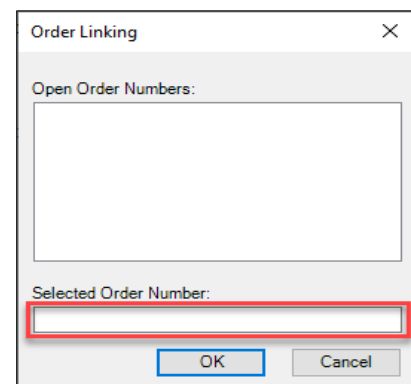
From the **360** ribbon,

1. Select the **Services** button
2. Click the **Underwriter Services** folder to expand
3. Double-click **Westcor – eWestcor**



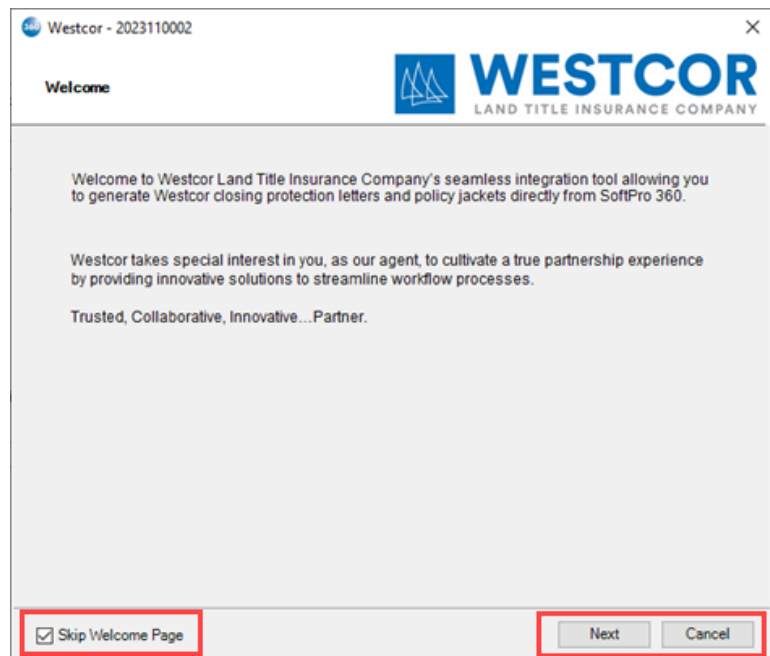
The **Order Linking** window displays to connect the integration.

4. Link an order
 - a. If no order is open, enter the corresponding order in the **Selected Order Number** field
 - b. If an order is open, the Integration populates the **Open Order Numbers** with the active order and automatically links to the order for you
5. Click the **OK** button to continue



Once a ProForm Order is linked, the **Welcome** screen displays.

6. You can check the **Skip Welcome Page** check box to skip having the **Welcome** screen display each time you log into Westcor
7. Click the **Next** button to continue or **Cancel** to exit the integration

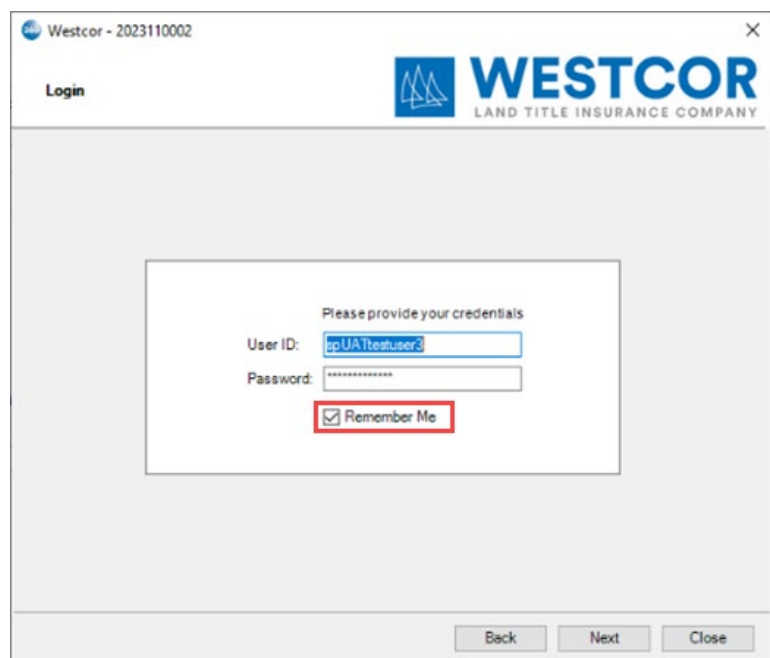


Logging into Westcor

8. From the **Westcor Login** window, enter your login credentials

HINT: If you check the **Remember Me** check box you are automatically logged in the next time you use the program.

9. Click the,
 - **Next** button to continue
 - **Back** button to return to the **Welcome** screen
 - **Close** to exit the integration



Creating a Westcor Base Order

From the **Title Services** screen, the first time you login to Westcor with a new ProForm order, you must select and send your **Agent Number** to Westcor to create a base order. This must be done prior to submitting a product request.

1. Click the **Agent Number: None** link to select your **Agent Number**
2. Click the **OK** button to send the information to Westcor to create the base order
3. Click the **Property** link to adjust the property address if needed

NOTE: A message is displayed reminding you to add the Agent Number. You cannot add a product until this is done as the buttons are disabled.

Westcor - 2024010008

Title Services

Property: [Address 1, Adams, TN, 37010](#) Agent Number: [none](#)

Product	Type	Insured	Amount	Status	Created On	Action
To add a product, click the "Add Product" button below.						

Please add your Agent Number to create a Westcor order

Ordering a Closing Protection Letter

Once the Agent Number is added and the Westcor order created, you can now submit your request.

4. From the **Title Services** window, click the **Add Product** button
5. Select **Closing Protection Letter** to open the **Closing Information** window

From the Closing Information window, you'll select/enter more specific information for your request.

Westcor - 2024010008

Available Products

☒ Closing Protection Letter
 Attach a new Closing Protection Letter to your ProForm order.

☐ Jacket
 Attach a new Jacket to your ProForm order.

Close

6. Select/enter the,

- Type** - lists the available Closing Protection Letters
- Lender** - pulls the lender(s) from your ProForm order
- Issued Date** - displays the current date by default and is not editable
- Covered Party(s)** - check boxes are greyed out if a covered party is not required
- Dual CPL** – selecting this in a request returns a CPL listing the title and settlement agents you specify on this screen
- Show Additional Agency Locations in CPL** - lists the branch addresses associated with the title agent (if applicable) on the addendum page of the CPL
- Policy Producing Agent** and **Policy Producing Agent Address** fields - displays the title agent information that you can select from
- Escrow Closing Agent** and **Escrow Closing Agent Address** fields – if the Dual CPL option is selected, the field are enabled and shows the settlement agent information selection to be displayed on the CPL.
- Additional Information** – (optional) information that will be shown at the top of the CPL.

7. Click the **Submit** button to continue to review your CPL8. From the **Review Closing Protection Letter** window, you can,

- View** – click the PDF icon to open the document
- Copy** – click the Copy icon to copy the document to the clipboard

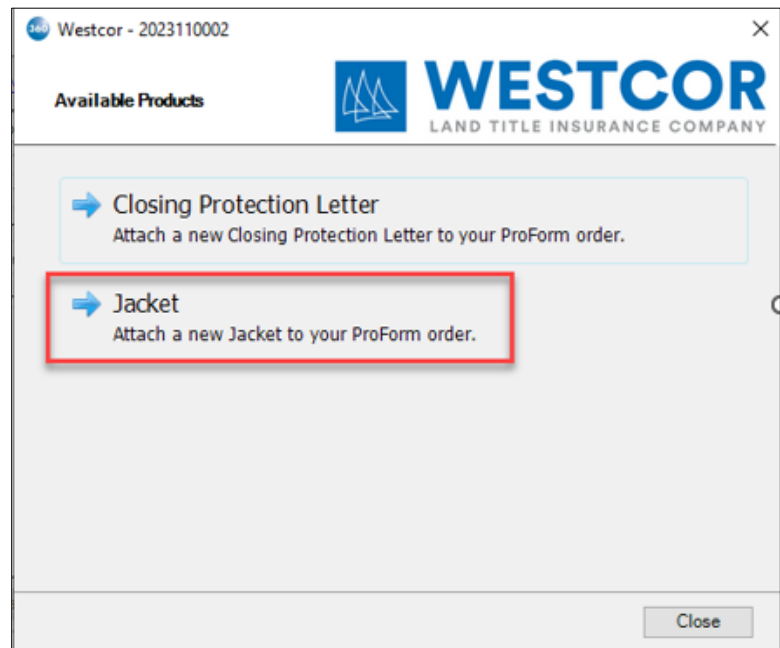
9. Click **Accept** to save the CPL to the **Attachments** in your ProForm order

NOTE: The CPL is selected by default. If it is de-selected, it will not be saved to your ProForm order when you click **Accept**.

View	Copy	Document Name	File Name	File Size	Transferred
		613362-3581358_CPL Single Trans W_Seller 2018 2.0	613362-3581358_CPL Single Trans W_Seller 2018 2.0.pdf	566.99 KB	100%

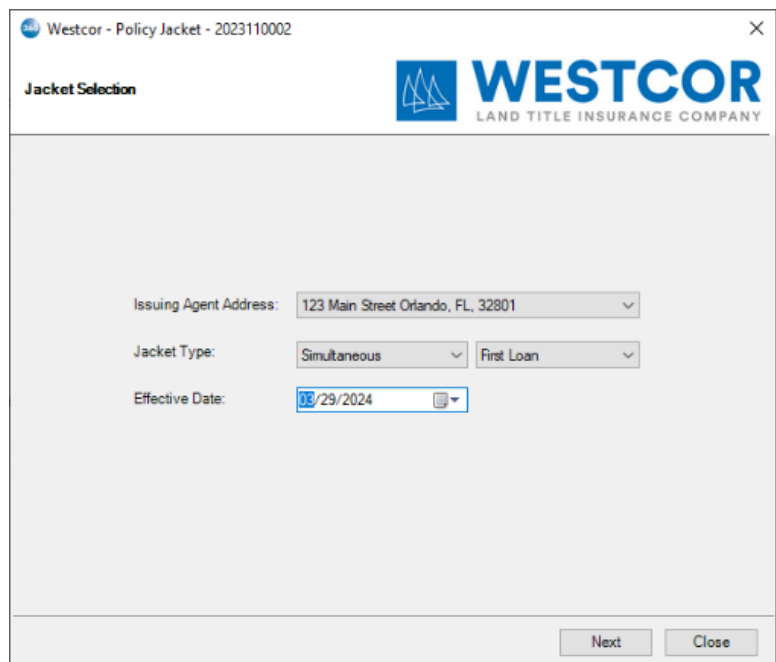
Ordering a Policy Jacket

1. From the **Title Services** window, click **Add Product** button
2. Select **Jacket** to open the **Jacket Selection** window



3. Select the,
 - a. **Issuing Agent Address** from the drop-down
If there is only one option, it is selected by default.
 - b. **Jacket Type**
Selecting **Loan or Simultaneous** requires the loan be identified (i.e., First Loan, Second Loan, etc.)
 - c. **Effective Date**

4. Click **Next**



5. Select/enter the **Jacket information**

- a. **Policy Form**
- b. **Rate Type**
- c. **Coverage** amount
- d. **Premium** amount
- e. **Split**
- f. **Remittance**
- g. **Codes**

6. Click **Next**

Westcor - Policy Jacket - 2023110002

Loan Jacket Information

WESTCOR LAND TITLE INSURANCE COMPANY

Policy Form: LP-13 - ALTA 2006 LP

Rate Type: Expanded

Coverage: \$250,000.00

Premium: \$600.00

Split: 15.00%

Remittance: \$90.00

Codes: 100

Back Next Close

Endorsements

From the **Endorsements** screen, you may select one or more endorsements needed for the policy.

1. Check the corresponding check box for each endorsement you wish to issue
2. For each endorsement you can,
 - a. Add or edit the **Code** associated with a selected endorsement
 - b. Enter a **Premium** amount
 - c. Enter a **Remittance** amount

If available, the **Westcor Suggested Premium** is displayed; this field is not editable.

3. Click **Submit** to open the **Review Policies** window

Westcor - Policy Jacket - 2023110002

Loan Endorsements Included with Policy

WESTCOR LAND TITLE INSURANCE COMPANY

ALTA 2006 LP

Display All



Selected	Name	Codes	Premium	Remittance	Westcor Suggested Premium
<input type="checkbox"/>	General		0.00	0.00	0.00
<input type="checkbox"/>	Variable Rate, FNMA 7 Year Balloon CLTA...	119.1	0.00	0.00	0.00
<input type="checkbox"/>	ALTA Form 1-06 Street Assessment (06/17...	1-06	0.00	0.00	0.00
<input type="checkbox"/>	ALTA 3-06 CLTA 123.1-06 Zoning Land O...	3-06	0.00	0.00	0.00
<input type="checkbox"/>	ALTA 7-06 CLTA 116.5-06 Manuf House ...	7-06	0.00	0.00	0.00
<input type="checkbox"/>	ALTA 7.1-06 CLTA 116.5.1-06 Manufactur...	7.1-06	0.00	0.00	0.00
<input type="checkbox"/>	ALTA 8.1-06 CLTA 110.9-06 Environmenta...	8.1-06	0.00	0.00	0.00
<input type="checkbox"/>	ALTA 11-06 CLTA 110.11-06 Mtg Mod w/ ...	11-06	0.00	0.00	0.00
<input type="checkbox"/>	ALTA Form 12-06 Aggregation Tie-In (06/1...	12-06	0.00	0.00	0.00
<input type="checkbox"/>	ALTA 17-06 CLTA 103.11-06 Access and ...	17-06	0.00	0.00	0.00
<input type="checkbox"/>	ALTA 17.1-06 CLTA 103.12-06 Indirect Ac...	17.1-06	0.00	0.00	0.00

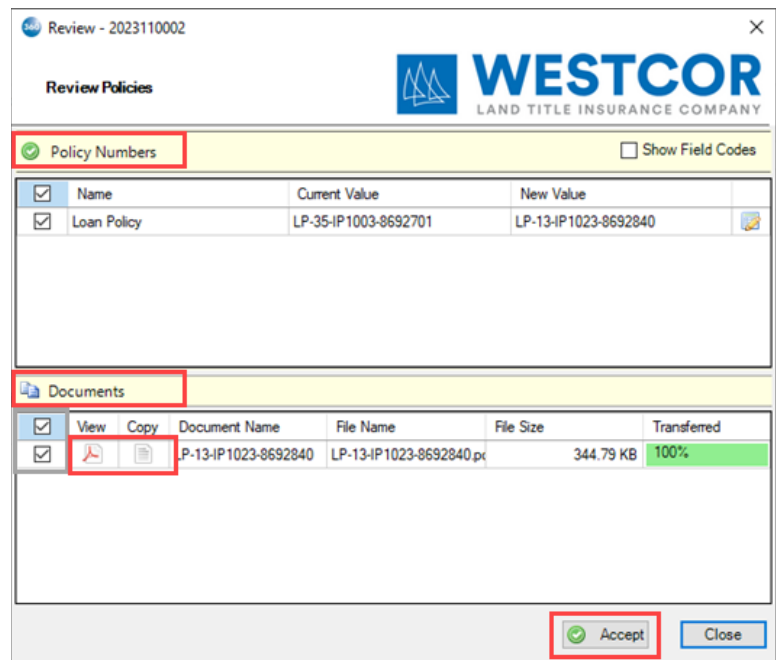
Notes: Any changes made to endorsements here will not update the ProForm order.

Back Next Cancel



From the **Review Policies** window, displays the policy number and jacket(s) requested.

The **Policy Numbers** section displays the **Current Value** (the data currently in the ProForm order) and the **New Value** (policy number corresponding returned from Westcor). Once accepted, this information is written to corresponding field in your ProForm order.

4. From the **Document** section you can,
 - a. **View** – click the PDF  icon to open the document
 - b. **Copy** – click the **Copy**  icon to copy the document to the clipboard
5. Click **Accept** to save the policy jacket to the **Attachments** and write the policy number to your ProForm order



Name	Current Value	New Value
Loan Policy	LP-35-IP1003-8692701	LP-13-IP1023-8692840

View	Copy	Document Name	File Name	File Size	Transferred
		LP-13-IP1023-8692840	LP-13-IP1023-8692840.pdf	344.79 KB	100%

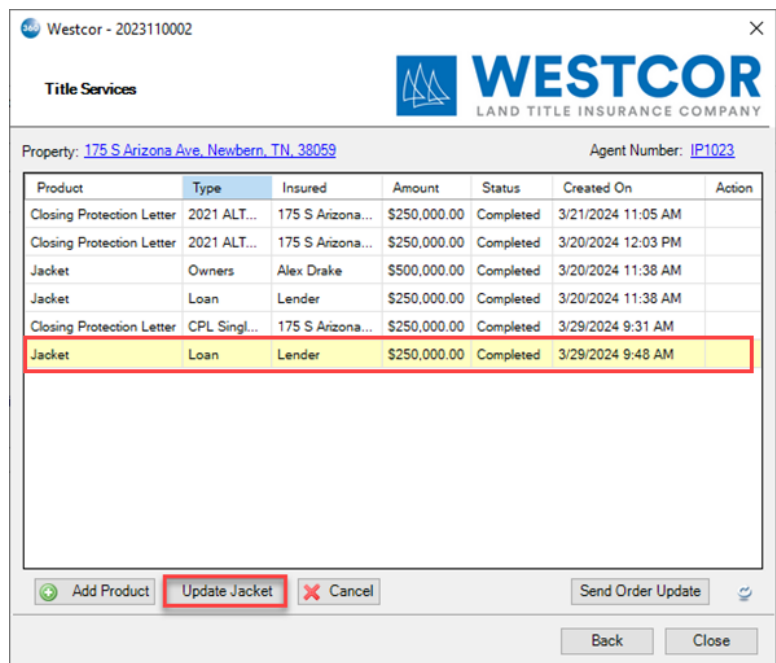
Updating a Jacket

From the **Title Services** window,

1. Select a Jacket you wish to update
2. Click the **Update Jacket** button

Once clicked, you are navigated to the **Jacket Selection** window.

3. Repeat **steps 3-6** in the **Ordering a Policy Jacket** section to enter needed updates



Product	Type	Insured	Amount	Status	Created On	Action
Closing Protection Letter	2021 ALT...	175 S Arizona...	\$250,000.00	Completed	3/21/2024 11:05 AM	
Closing Protection Letter	2021 ALT...	175 S Arizona...	\$250,000.00	Completed	3/20/2024 12:03 PM	
Jacket	Owners	Alex Drake	\$500,000.00	Completed	3/20/2024 11:38 AM	
Jacket	Loan	Lender	\$250,000.00	Completed	3/20/2024 11:38 AM	
Closing Protection Letter	CPL Singl...	175 S Arizona...	\$250,000.00	Completed	3/29/2024 9:31 AM	
Jacket	Loan	Lender	\$250,000.00	Completed	3/29/2024 9:48 AM	

Canceling a CPL or Jacket

From the **Title Services** window,

1. Select the Jacket or CPL you wish to cancel
2. Click the **Cancel** button
3. When prompted, click the **Yes** button to confirm the cancellation

The cancellation request is then submitted to Westcor.

Westcor - 2023110002

Title Services

Property: [175 S Arizona Ave, Newbern, TN, 38059](#) Agent Number: [JP1023](#)

Product	Type	Insured	Amount	Status	Created On	Action
Closing Protection Letter	2021 ALT...	175 S Arizona...	\$250,000.00	Completed	3/21/2024 11:05 AM	
Closing Protection Letter	2021 ALT...	175 S Arizona...	\$250,000.00	Completed	3/20/2024 12:03 PM	
Jacket	Owners	Alex Drake	\$500,000.00	Completed	3/20/2024 11:38 AM	
Jacket	Loan	Lender	\$250,000.00	Completed	3/20/2024 11:38 AM	
Closing Protection Letter	CPL Singl...	175 S Arizona...	\$250,000.00	Completed	3/29/2024 9:31 AM	
Jacket	Loan	Lender	\$250,000.00	Completed	3/29/2024 9:48 AM	

Buttons: Add Product, Update Jacket, **Cancel**, Send Order Update, Back, Close

Sending Updated Order Information to Westcor

If you've made changes to your ProForm order and would like to send these changes to Westcor, from the **Title Services** screen,

1. Click the **Send Order Update** button

This action updates the base order in Westcor's system to include the current information in your ProForm order.

Westcor - 2023110002

Title Services

Property: [175 S Arizona Ave, Newbern, TN, 38059](#) Agent Number: [JP1023](#)

Product	Type	Insured	Amount	Status	Created On	Action
Closing Protection Letter	2021 ALT...	175 S Arizona...	\$250,000.00	Completed	3/21/2024 11:05 AM	
Closing Protection Letter	2021 ALT...	175 S Arizona...	\$250,000.00	Completed	3/20/2024 12:03 PM	
Jacket	Owners	Alex Drake	\$500,000.00	Completed	3/20/2024 11:38 AM	
Jacket	Loan	Lender	\$250,000.00	Completed	3/20/2024 11:38 AM	
Closing Protection Letter	CPL Singl...	175 S Arizona...	\$250,000.00	Completed	3/29/2024 9:31 AM	
Jacket	Loan	Lender	\$250,000.00	Completed	3/29/2024 9:48 AM	

Buttons: Add Product, Update Jacket, Cancel, **Send Order Update**, Back, Close