Westcor
Dual CPLs & Policy Jackets
User Guide

June 2024

Copyright and Licensing Information

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History

| Date	Version	Details
April 2024	2.1	In this release, - Logo updated - Property link added to Title Services - Updated Agent Number selection to include additional information in grid format - Endorsements o Matching ProForm o Ability to enter remittance value o 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**
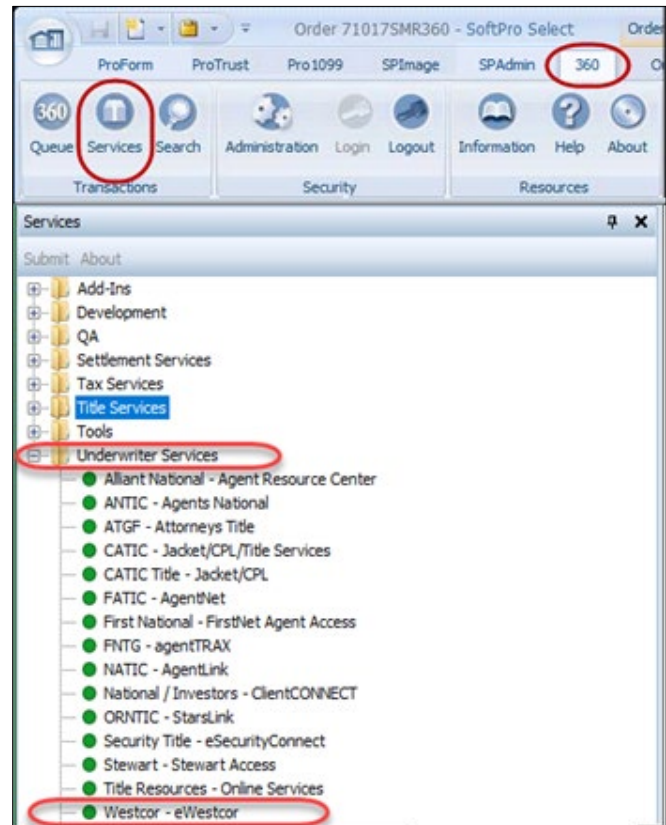
The **Order Linking** window displays to connect the integration.

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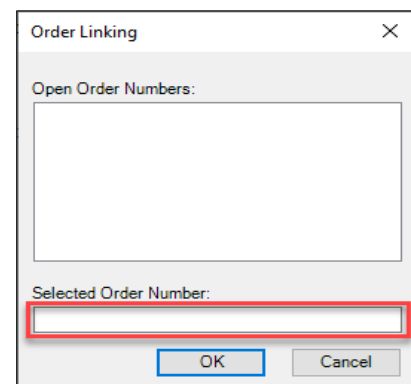
Once a ProForm Order is linked, the **Welcome** screen displays.

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
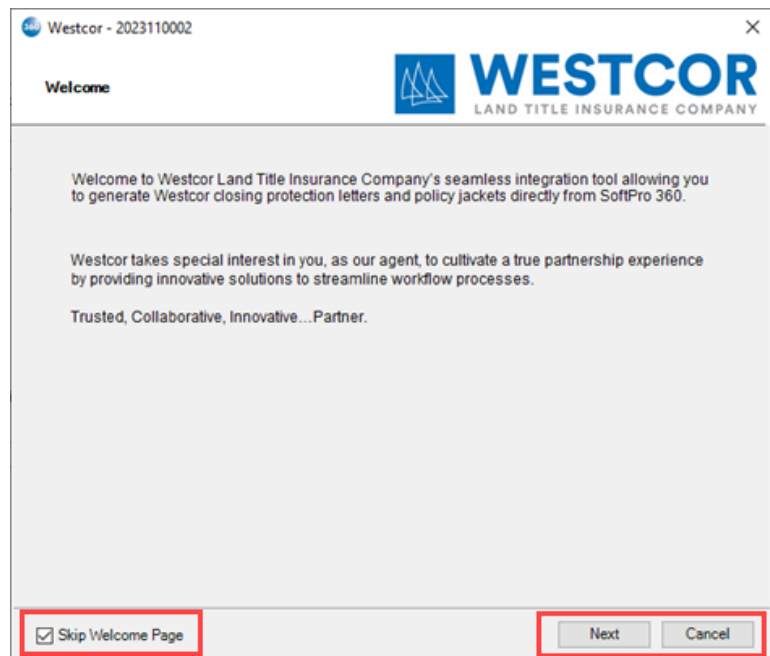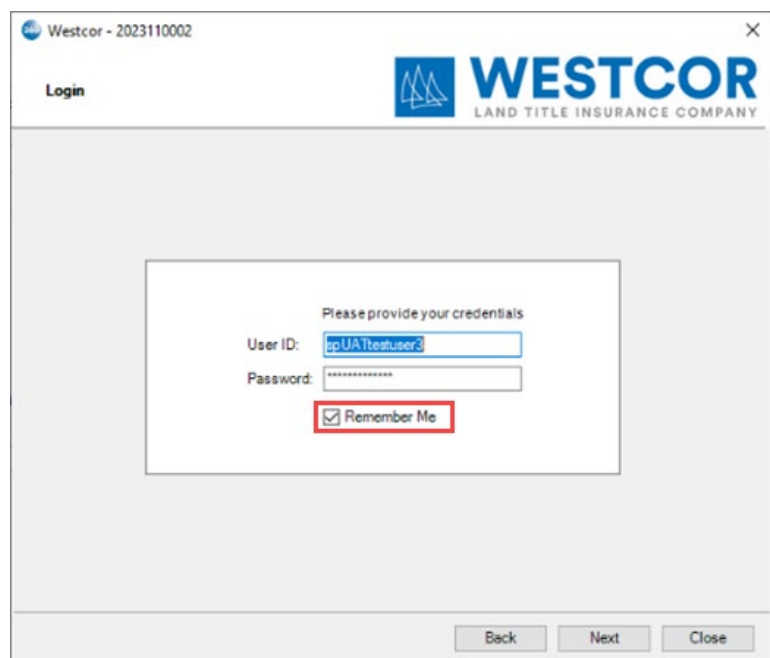
Logging into Westcor

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.

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.

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

7. Click the **Submit** button to continue to review your CPL

8. From the **Review Closing Protection Letter** window, 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

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**.
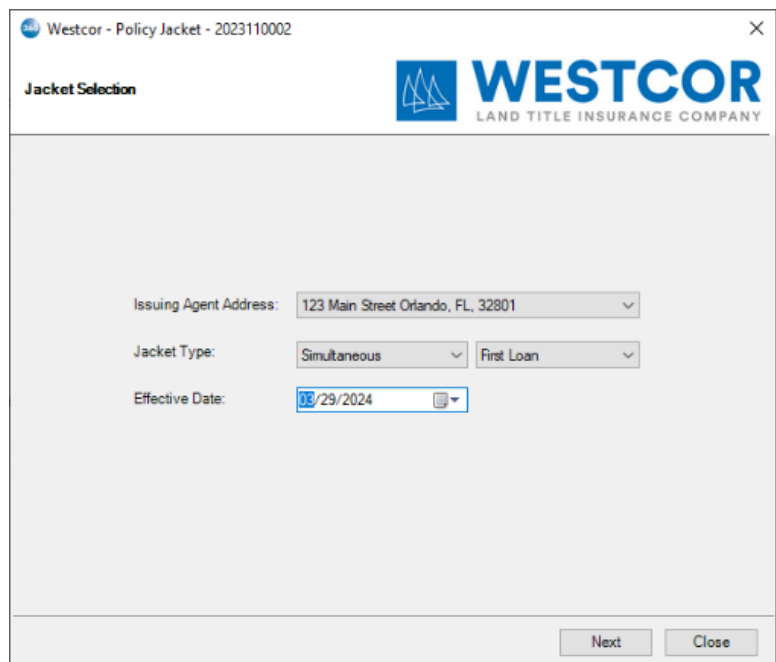
Ordering a Policy Jacket

1. From the **Title Services** window, click **Add Product** button

2. Select **Jacket** to open the **Jacket Selection** window
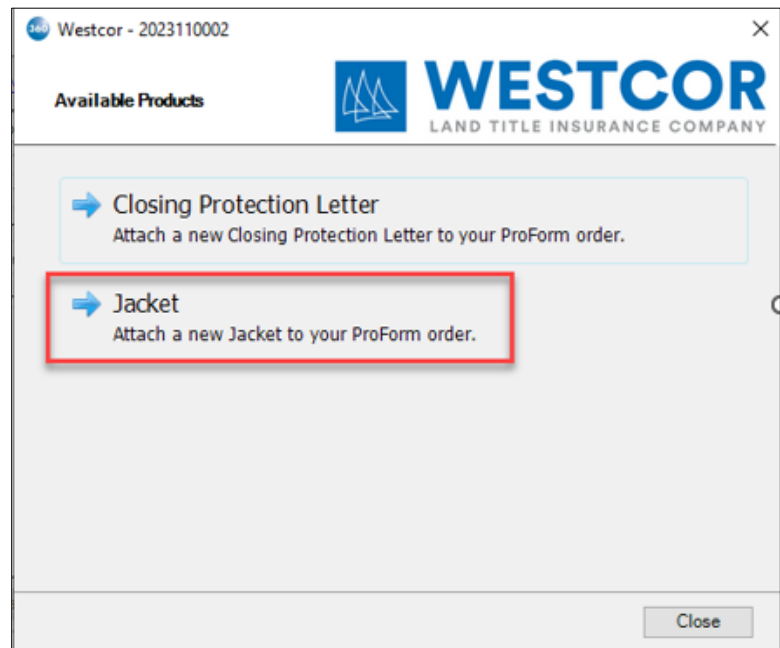
3. Select the,

   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**

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

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
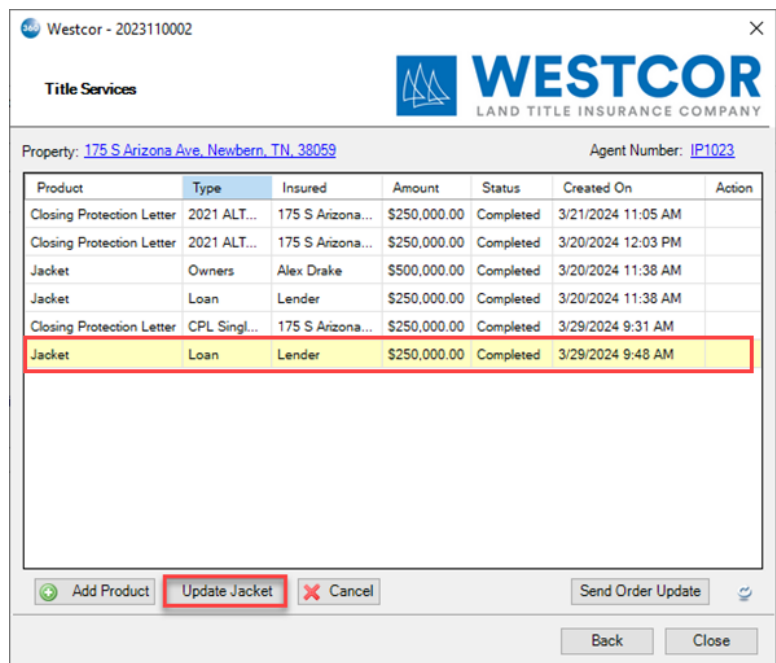
Updating a Jacket

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

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.

Sending Updated Order Information to Westcor

If you've made changes to your ProFrom 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.