

Westcor Dual CPLs & Policy Jackets Updated 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

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History

Date	Details
May, 2022	Updated Screen Shots
October, 2021	Updated
March. 2018	Global Deployment

Introduction

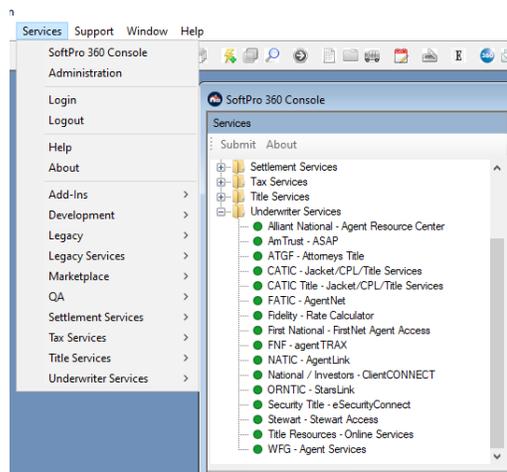
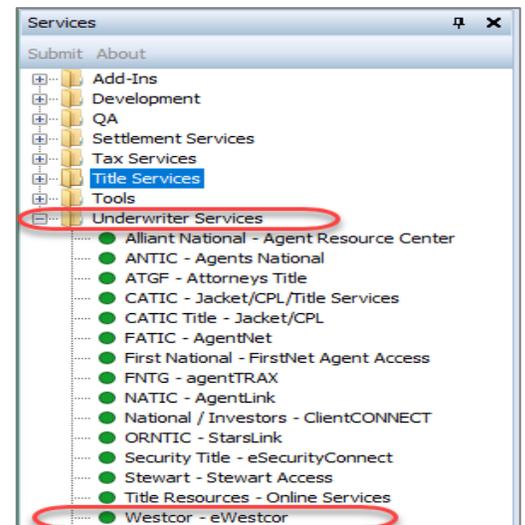
The **Westcor** service in SoftPro 360 allows you to submit data from your ProForm order to request Closing Protection Letters and Policy Jackets and receive those products back into your order

Accessing into Westcor

Open the order you are using to create your Westcor order

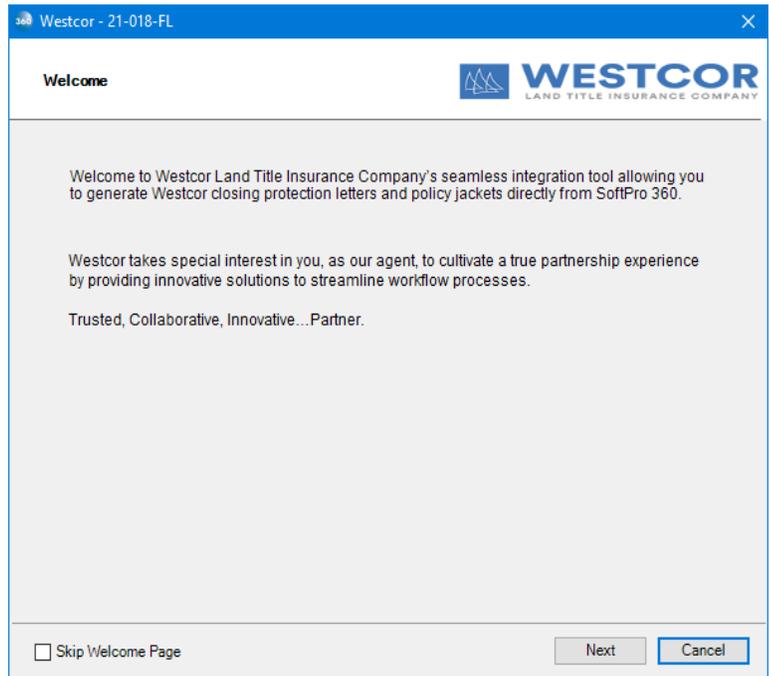
NOTE: Westcor automatically links to the open, active order and pulls data from the order for the product request. If you do not have an order open when logging into Westcor, you will be prompted to select the applicable order.

1. From the **360** ribbon, click the **Services** button
2. Locate the **Underwriter Services** folder
3. Double-click the **Westcor – eWestcor** menu option



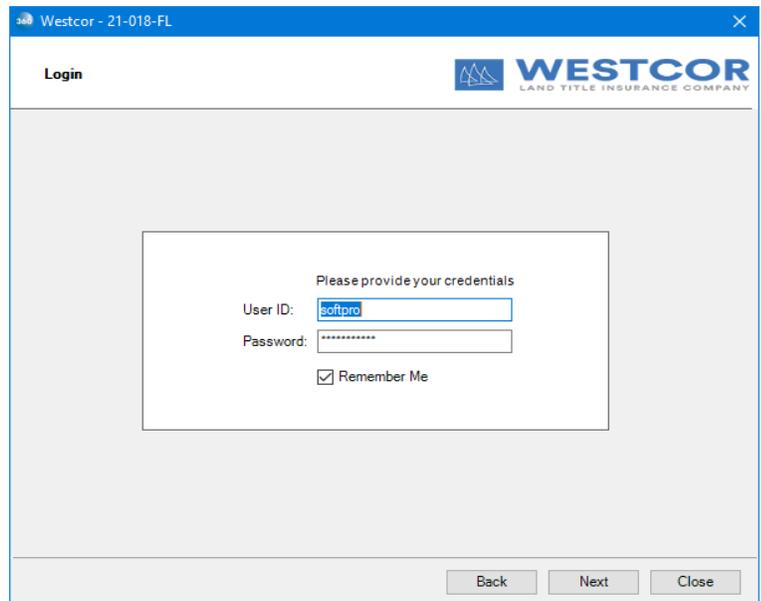
Logging into Westcor

1. On the **Welcome** screen, check the **Skip Welcome Page** if you want to skip this page on subsequent logins.
2. Click **Next**.



3. From the **Westcor Login** window, enter your login credentials; click **Next**.

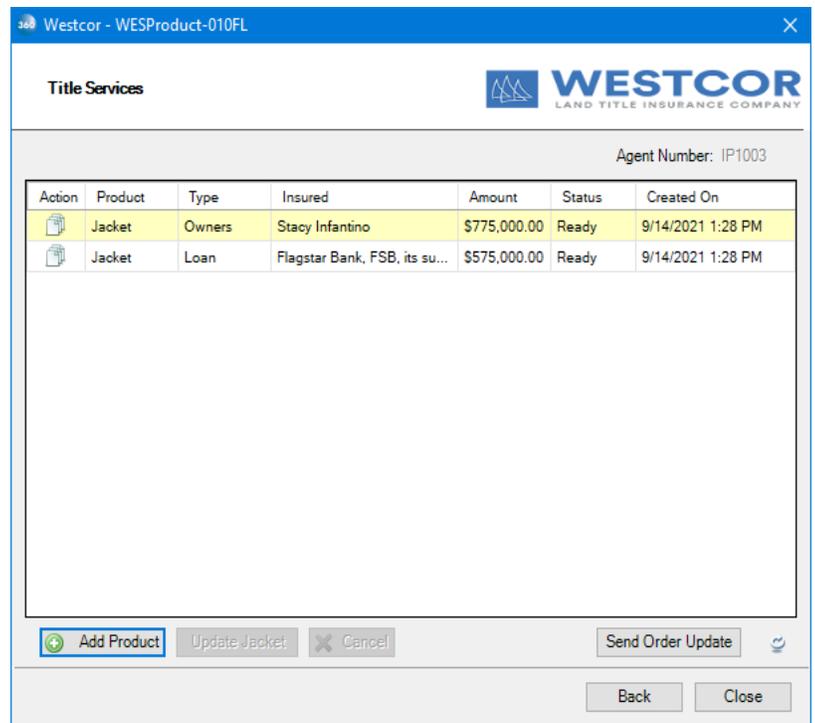
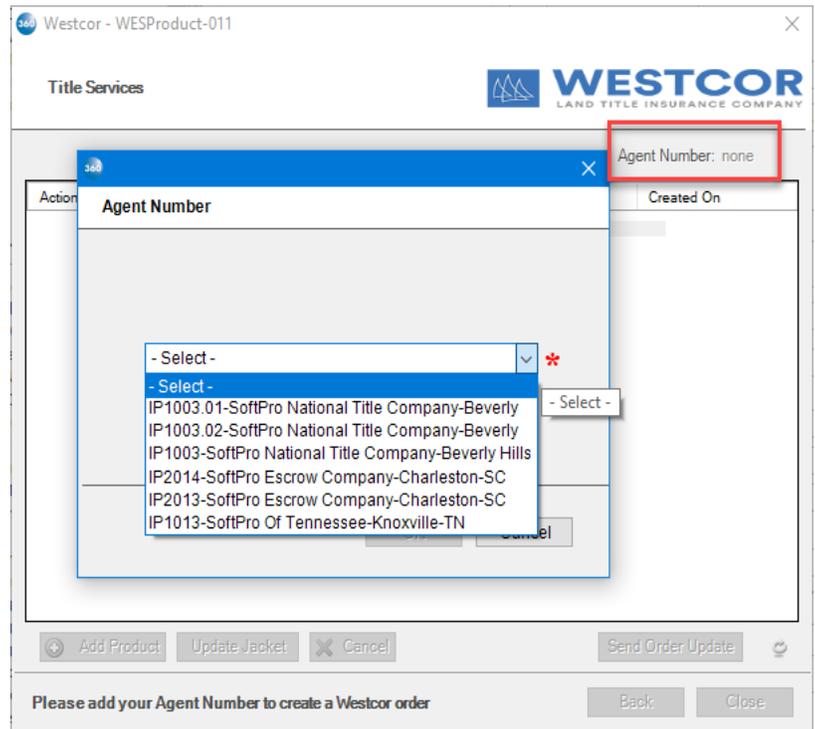
HINT: If you check the **Remember me** check box you are automatically logged in the next time you use the program.



Creating a Base Westcor Order

1. From the **Title Services** screen, the first time you login to Westcor with a new ProForm order, you must select your **Agent Number** by clicking the **none** link.
2. Click **Next**.
3. Select your **Agent Number** and click **OK**.

Clicking **OK** will send information from your ProForm order to Westcor to create a base order, which is required before you can request a CPL or Jacket.



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Ordering a Closing Protection Letter

1. From the **Title Services** screen, click **Add Product** and select **Closing Protection Letter**.

2. From the **Closing Information** screen, make the following selections. If there is only one option, then it will be selected by default.

- **Type** will list the available Closing Protection Letters.
- **Lender** will pull the lender(s) from your ProForm order.
- **Issued Date** will display Today's date by default and is not editable.
- **Covered Party(s)** check boxes will be greyed out if a covered party is not required.
- Selecting **Dual CPL** in a request will return a letter that lists both the title and settlement agents you specify on this screen.
- **Show Additional Agency Locations in CPL** will list the branch addresses associated with the title agent (if applicable) on the addendum page of the CPL.
- **Policy Producing Agent & Address** fields will display title agent information that you can select from.
- The **Escrow Closing Agent & Address** fields will be enabled if you check the **Dual CPL** option. It will show settlement agent information that you select to display on a CPL.
- You can also specify **Additional Information** that will be shown at the top of the CPL.
- Please note: *Proposed Insurance Language* for the CPL
 - This information for the CPL pulls from the Proposed Insured Language field on the Commitment Schedule A screen.

The screenshot shows the 'Title Services' window for 'Westcor - WESProduct-011'. The 'Available Products' dropdown is open, showing two options: 'Closing Protection Letter' (highlighted with a red box) and 'Jacket'. Below the dropdown, the 'Add Product' button is also highlighted with a red box. The 'Closing Protection Letter' option includes the text: 'Attach a new Closing Protection Letter to your ProForm order.' The 'Jacket' option includes the text: 'Attach a new Jacket to your ProForm order.'

The screenshot shows the 'Closing Information' form for 'Closing Protection Letter - WESProduct-011'. The form contains the following fields and values:

- Type: CPL Single Trans W_Seller 2018 Atty Nc
- Issued Date: 9/14/2021
- Lender: BNY Mellon, N.A. - Loan 123456
- Covered Party(s):
 - Buyer
 - Lender
 - Borrower
 - Seller
 - Other: [Empty field]
- Dual CPL:
- Show Additional Agency Locations in CPL:
- Policy Producing Agent: IP1003 - SoftPro National Title Company - Beverly Hills -
- Policy Producing Agent Address: 305 Sunset Blvd, Suite 3000, Beverly Hills, CA, 90210
- Escrow Closing Agent: IP2014 - SoftPro Escrow Company - Charleston - SC
- Escrow Closing Agent Address: 155 Darlington Avenue, Charleston, SC, 29403
- Additional Information: (Will show on top of CPL) [Empty text area]

Buttons: [Lender Information](#), Submit, Close

- The **Lender Information** hyperlink will allow you to change the Lender information, if needed.

After clicking **Submit**, the **Review Policies** screen will open to display the the CPL from Westcor.

- From the **Review Closing Protection Letter** screen, you can view the CPL by clicking the PDF icon or clicking the Copy icon to save the document to the clipboard.

By default, the CPL will be selected. If it is de-selected, then it will not be saved to your ProForm order when you click **Accept**.

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

<input checked="" type="checkbox"/>	View	Copy	Document Name	File Name	File Size	Transferred
<input checked="" type="checkbox"/>			555173_CPL Single Trans W_Seller 2018 Atty Name 2.0	555173_CPL Single Trans W_Seller 2018 Atty Name 2.0.pdf	552.69 KB	100%

At the bottom right, there are 'Accept' and 'Close' buttons.

Ordering a Policy Jacket

1. From the **Title Services** screen, click **Add Product** and select **Jacket**.

The screenshot displays the Westcor software interface. The top window is titled "Title Services" and shows a table of services. The "Add Product" button is highlighted with a red box. The bottom window is titled "Available Products" and shows two options: "Closing Protection Letter" and "Jacket". The "Jacket" option is highlighted with a red box. The "Jacket Selection" screen shows the following information:

Action	Product	Type	Insured	Amount	Status	Created On
	Closing Protection Letter	CPL Singl...	1445 Palm Way	\$575,000.00	Completed	9/14/2021 2:01 PM

Available Products

- Closing Protection Letter
Attach a new Closing Protection Letter to your ProForm order.
- Jacket
Attach a new Jacket to your ProForm order.

Jacket Selection

Issuing Agent Address: 155 Darlington Avenue Charleston, SC, 29403

Jacket Type: Simultaneous First Loan

Effective Date: 09/23/2021

Next Close

2. From the **Jacket Selection** screen, select the **Issuing Agent Address**. If there is only one option, then it will be selected by default.
3. Select the **Jacket Type**.
 - If **Loan** or **Simultaneous Jacket Type** is selected, specify which loan to use from your order (i.e., First Loan, Second Loan, etc.).
4. Select the **Effective Date**.
 - This will default from the ProForm Policy Schedule A, Effective date/time field.
5. Click **Next**.

6. From the **Loan Jacket Information** screen, select the **Policy Form**.
7. Select the **Rate Type**,
8. Enter the **Coverage** and **Premium** amounts.
 - Coverage Amount will default with the following information.
 - i. Loan Policy Coverage Amount
 - ii. Owner's Policy Coverage Amount
9. You may enter your **Split** and the **Remittance** will automatically calculate for you. If you have a specific code to identify the policy; it may be entered in the **Codes** field.
10. Click **Next**.

Westcor - Policy Jacket - WESProduct-011

Loan Jacket Information 

Policy Form: ALTA Loan Policy (6-17-06) ▾

Rate Type: Simultaneous ▾

Coverage: \$575,000.00

Premium: \$25.00

Split: 20 ▾

Remittance: \$5.00

Codes:

Back Next Close

Endorsements

1. From the **Endorsements** screen, you may select one or more endorsements needed for the policy.
2. You can add or edit the **Code** associated with a selected endorsement.
3. You can also enter a **Premium** amount for an endorsement.
4. Click **Submit**.

After clicking **Submit**, the **Review Policies** screen will open to display the policy number and the jacket from Westcor.

Selected	Name	Codes	Premium
<input checked="" type="checkbox"/>	General		0.00
<input type="checkbox"/>	ALTA Form 1-06 Street Assessment (06/17/06)	1-06	0.00
<input type="checkbox"/>	Secondary Mortgage Market		0.00
<input type="checkbox"/>	ALTA Form 3-06 Zoning (Land Only) (06/17/06)	3-06	0.00
<input type="checkbox"/>	ALTA 3.1-06 (Zoning-Completed Structure) Rev...	3.1-06	0.00
<input type="checkbox"/>	ALTA 3.2-06 Zoning-Land Under Development ...	3.2-06	0.00
<input type="checkbox"/>	ALTA 4-06 Condominium-Assessments Priority (...)	4-06	0.00
<input type="checkbox"/>	ALTA 4.1-06 Condominium - Current Assessmen...	4.1-06	0.00
<input type="checkbox"/>	ALTA 5-06 Planned Unit Development - Assess...	5-06	0.00
<input type="checkbox"/>	ALTA 5.1-06 Planned Unit Development - Cure	115.2	0.00

5. From the **Review Policies** screen, the policy number and jacket(s) you requested will display. You can view a jacket by clicking the **PDF** icon or clicking the **Copy** icon to save the document to your clipboard.
6. You can also copy the field code, if needed. Also, the integration will produce a policy number that allows Westcor to utilize the data captured in the ProForm order as an identifier within their own system.
7. Click **Accept** to save the jacket to the **Attachments** in your ProForm order and to write the policy number to your ProForm order.

By default, the checkboxes next to the policy number and jacket will be selected. If any are de-selected, then it will not be saved to your ProForm order when you click **Accept**.

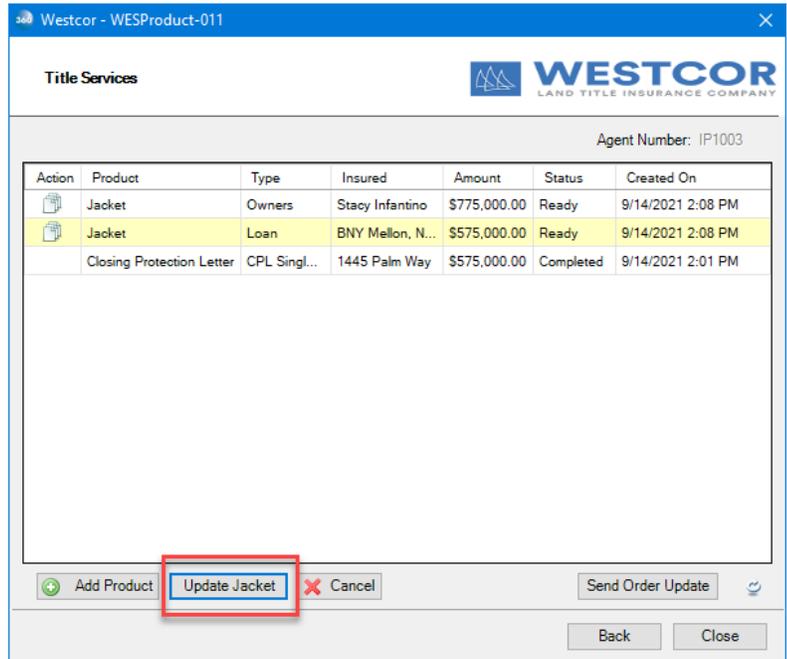
Policy Numbers	Name	Current Value	New Value
<input checked="" type="checkbox"/>	Loan Policy	484894165	LP-22-IP1003-8673792
<input checked="" type="checkbox"/>	Owner Policy	156465465	OP-6-IP1003-8673794

Documents	View	Copy	Document Name	File Name	File Size	Transferred
<input checked="" type="checkbox"/>			8673792	8673792.pdf	269.85 KB	100%
<input checked="" type="checkbox"/>			8673794	8673794.pdf	348.65 KB	100%

Updating a Jacket

1. From the **Title Services** screen, select a Jacket that you want to update.
2. Click **Update Jacket**.

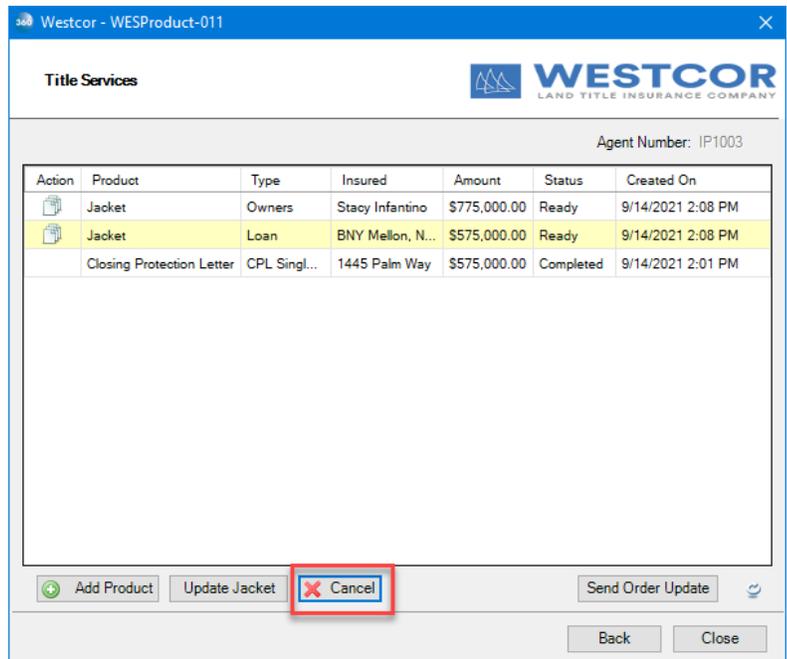
You will navigate to the **Jacket Selection** screen and walk through the same screens that were used to create the original jacket to make your updates.

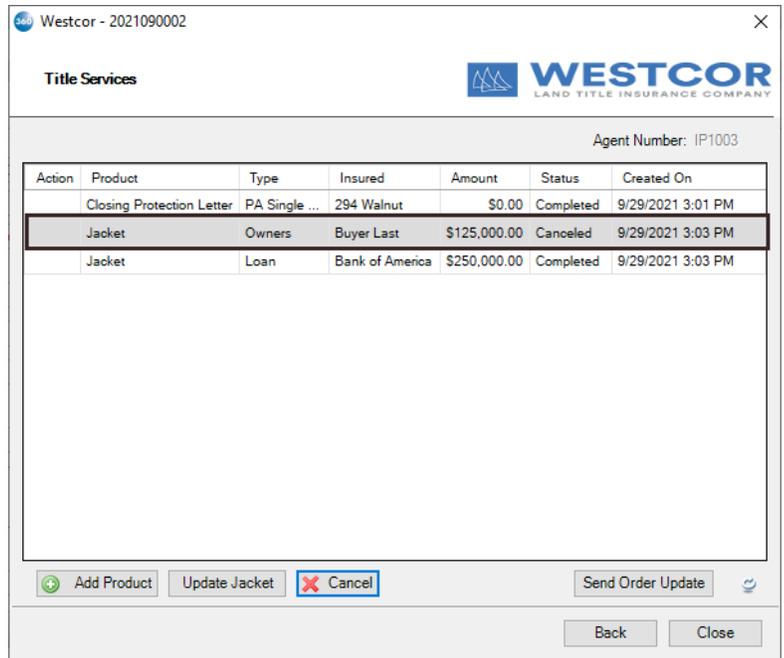


Canceling a CPL or Jacket

1. From the **Title Services** screen, select a Jacket or CPL that you want to cancel
2. Click **Cancel**.

You will be prompted to confirm that you want to cancel the product. Clicking **Yes** will submit the cancel request to Westcor.





Sending Updated Order Information to Westcor

1. From the **Title Services** screen, click **Send Order Update** if you have made changes to your ProForm order and would like to send these changes to Westcor. This action will update the base order in Westcor’s system to include the current information in your ProForm order.

