

# Managing AgentNet Transactions within the Impact/SQL Widget SoftPro 360

## How to Submit a Transaction to AgentNet

First American Title Insurance Company's **AgentNet** application allows agents to order **Closing Protection Letters, Back Title** and **Policy Jackets** via the Impact/SQL widget SoftPro 360. **AgentNet** can also be used to request an **SDN Search** and to request **Rates and Fees** from First American Title Insurance Company.

The user is referred to the "**Impact and SoftPro 360 – General User Introduction**" document for basic information on the SP360 widget. It is assumed, in this documentation, that the user is familiar with the SP360 widget.

The **SoftPro 360** widget should be opened and the **New Product** button should be clicked. The **SoftPro 360 New Product** screen will present. Depending on the number of products available it might be helpful to use the **Filter** field to narrow down the listing to locate the **FATIC - AgentNet** product. In the sample below, "Fat" was entered in the **Filter** field, thus narrowing the selection list to only the product shown. To select the product, simply double-click on "**FATIC - AgentNet**" or alternatively, highlight "**FATIC - AgentNet**" and then click on the **OK** button.

SoftPro 360 New Product	<b>—</b>
i Filter: Fat	

Order Linking	
Open Order Numbers:	
SP361474	
Selected Order Number:	
SP361474	
OK Cancel	

The **Order Linking** dialog will be presented on your screen, as shown here.

If you have an Impact/SQL file open on your desktop, it will be presented in the **Order Linking** dialog. The active order will be highlighted and entered in the **Selected Order Number** field. You could type in another file's number into the **Selected Order Number** field, but be careful not to get confused as to the file with which you are working.

If you do not have a file open on your desktop, you may type a file number into the **Selected Order Number** field. The full file number,

including leading zeros, must be entered. "1234" will not work if the file number is "00001234".

NOTE: The **Property State** must have been entered, in the Impact/SQL file order to login to **AgentNet**.

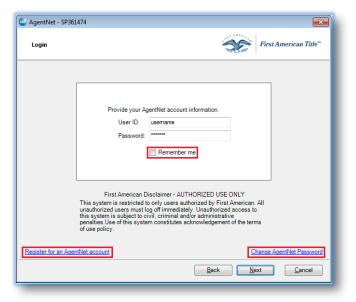
Once the file that is to be transacted with **AgentNet** is identified in the **Selected Order Number** field, click on **OK** to continue. Clicking on **Cancel** will terminate the order process.

The first time you place an order, the **AgentNet Welcome** screen is presented, as shown below. It provides you with information about **AgentNet**. Note that the Impact/SQL file number identified on the **Order Linking** screen is presented at the top of the **Welcome** screen.

😔 AgentNet - SP361474	×
Welcome	First American Title*
AgentNet®, First American's convenient platform for title agents, time-saving tools and increase title production efficiency.	is now integrated with SoftPro 360 to provide
By using AgentNet through SoftPro 360, agents can:	
Generate approved CPLs, policy jackets and policy numbers	that are auto-loaded into both systems
Calculate First American rates and fees	
Search Specially Designated Nationals (SDN)	
Search back title (where available)	
Minimize paper forms, re-keying and remittence errors	
Retain consistent data across systems	
Order searches and commitments	
For additional information, please contact:	
Agency Service Center First American Title Insurance Company (866) 701-3361	
agencysupport@firstam.com	
Velcome Page	Next Cancel

You may choose to skip this screen in the future by clicking on the **Skip Welcome Page** option (it is checked by default). Click on **Next** to continue.

The next screen presented is the **Login** screen. The **Login** screen requires your **AgentNet User ID** and **Password**.



Agents that have not registered can click the **"Register for an AgentNet account"** link and follow the prompts to register. This documentation will assume you have gone through the registration process.

Users can change their **AgentNet Password** by clicking on the **"Change AgentNet Password"** link. Checking the **Remember Me** checkbox will skip the login screen on subsequent uses.

After entering your **User ID** and **Password**, click **Next** to continue.

If you have access to multiple firms the **Firm Selection** screen will show a list of your available options. Select the firm, and click **Next** to continue. This firm selection determines the accounts and offices that are displayed.

AgentNet - AGNETNETDEMO-1006	X
Firm Selection	First American Title"
Please select the firm that you would like to use:	
Fim	
6413500 - SoftPro Test Firm	
6416579 - SoftPro Test Firm 2	
	Back Next Cancel

If you have multiple accounts, the **Underwriter Selection** screen will show a list of your available accounts. Select the account, and click **Next** to continue.

nderwriter Selection	First American Ti
lease select the office an	d underwriter that you would like to use:
Office	Underwriter
SoftPro MIDWEST Office	First American Title
SoftPro MIDWEST Office	Ohio Bar Title
elected Office/Underwrite	er.
elected Office/Underwrite First American Title SoftPro MIDWEST Office 987 Sample Drive, Suite Champaign, IL 13115	

The next screen presented is the **Title Services** screen. This is the screen from which products will be ordered.

The **Title Services** screen shows existing AgentNet transactions that are associated with the linked Impact/SQL file. In the screen shot below, no products have been ordered for the selected file.

Agent	Vet - SP3614	74					x
Title 9	Services				X	First American Title"	
Action	Product	Туре	Insured	Amount	Status	Created On	
			To add a product, click	the "Add Product" button I	below.		
Ad	Id Product	💢 Cancel			A Agent	Net File Information	
	AgentNet Pa			Back		Close	
Change	Agentivel Fa	Samond			`	Close	

**NOTE:** To view the Impact/SQL file data supplied to **AgentNet** click the **AgentNet File Information** link located at the bottom right of the screen. This will display the Borrowers' Names, Vesting language, Sellers, Property Address, and Legal Description. The Property Type drop-down box located on this screen is a required field.

Data Submittee	to AgentNet First Ameri	can Title™
Property Type		<del>0</del> - ^
Borrowers	Harold Night	
Vesting	Harold Night, An unmarried man	=
Sellers/Owners	Steve Coleman	
Property Address	456 Somewhere Ave Phoenix, AZ 85029	
County	Maricopa	
Lot	124	
Block		
Section		
Unit		-

**NOTE 2**: The **A Warning** icon, in front of the **AgentNet File Information** link, lets the user know that some required file data is missing. Use the link to open the **Data Submitted to AgentNet** screen

In this sample situation, the **Property Type** entered into the Impact/SQL file was not automatically matched with the options available, and so the user must complete the **Property Type** entry by selecting an option from the drop-down list provided. The options are **Residential (1-4 family)** and **Non-Residential (all other)**. After updating the data, click on **Close** to return to the **Title Services** screen.

Once all required fields have been completed, the  $m{\varDelta}$ 

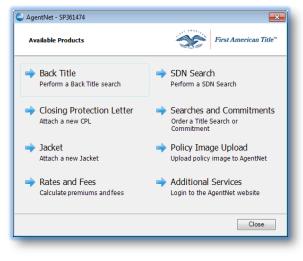
Warning icon will no longer present on the Title Services screen.

To order an **AgentNet** product, click the **Add Product** button, at the bottom left of the **Title Services** screen.

Click on **Cancel** to exit the **Title Services** screen. If you **Cancel**, you will be asked if you are cancelling the **Selected Product** or the **AgentNet File**. Select the desired option.

# How to Submit a Request for Back Title to AgentNet

The **Add Product** button will bring up the **Available Products** screen, where you can select the product you wish to order, by clicking on the label for each.



🕹 A	gentNet	- Back Title - SP361474		×
E	Back Titl	e Search	First American	n Title™
S	Select up	to 6 fields to search by:	2 of 6 fields set	ected
[	Include	Field	Value	*
		APN	555-66-777	
		Last Name		
		Street #	456	=
	<b>V</b>	Street Name	Somewhere Ave	
	<b>V</b>	City	Phoenix	
		Zip Code	85029	
		Condo/Subdivision Name	Happy Acres	
		Unit/Lot #	124	
		Block/Square		
		Section/Acreage		-
			· · · · · · · · · · · · · · · · · · ·	
			Back Search Ca	ncel
	_			

To order **Back Title**, where available, click on **Back Title** on the **Available Products** screen. The **Back Title Search** screen will be presented, with data values pulled from the file identified when logging in. It allows you to select up to six fields by which to search. Check the **Include** box for the desired fields, then click **Search** to continue.

The **Back Title Search Results** screen will show all matching results – on either the **Back Title** or **TRD (Title Resource Database)** tabs, as appropriate. Check the **Select** box then click the **Order** button to retrieve the selected **Back Title**.

-	et - Back Title - itle Search Resu	Its		First Americ	an Title <sup>™</sup>
	Back Title and cli	ck Order to view:		1	
Back Title Select	e TRD Date	StreetNo	StreetName	CityName	^
		13334	WINDSOR AVE	Goodyear	
	12/10/2007	13352	WINDSOR	Goodyear	
	12/10/2007	13352	WINDSOR	Goodyear	
	11/1/2002	13375	WINDSOR	Goodyear	
<b>V</b>	6/28/2011	13395	WINDSOR	Goodyear	
	6/28/2011	13395	WINDSOR	Goodyear	
	6/27/2005	13573	WINDSOR	Goodyear	
•	6/27/2005	13573	WINDSOR	Goodyear	
2 Documer	nts Selected (10 m	nax)	200 Results F	Returned (368 Doc	uments)
			Back C	<u>)</u> rder	<u>C</u> ancel

**AgentNet** will immediately return the selected **Back Title(s)**. The **Review Documents** screen will allow you to view or copy the document(s) by clicking on the appropriate icons. Click the **Accept** button to add the document(s) to your Impact/SQL file.

•	-				3	<u> </u>
F	Review D	ocumen	ts	2	First.	American Title™
<b>V</b>	View	Сору	Document Name	File Name	File Size	Transferred
	×		BT-59171_f205bf4	BT-59171_f205bf4	169.37 KB	100%
<b>V</b>	×	Ē	BT-59194_bf9bc9a	BT-59194_bf9bc9a	785.44 KB	100%
				Back	Accept	Cancel

The document(s) will be available to you in your **User Attachments** widget where it may be printed, emailed or published to a document retention system.

# How to Submit a Request for a Closing Protection Letter to AgentNet

To order a **Closing Protection Letter**, click the **Add Product** icon at the bottom of the **Title Services** screen; then, on the **Available Products** screen click on the **Closing Protection Letter** option.

The **Closing Protection Letter** screen will allow you to select the type of Closing Protection Letter (CPL) you want to request. The **Closing Date**, **Loan Number** and **Loan Amount** will populate from the Impact/SQL file. If you have multiple loans in the Impact/SQL file, select the applicable one from the dropdown and the loan amount will correspond. If available, select the covered party(s) by checking the appropriate box, in the **Covered** column, and select the address that should show on the Closing

Closing F	Protection Lett	er / AZ			Fire Fire	st Americai	n Title"
		First Americ	an 1	Title Insurance Compar	ıy		
Select the	Type: Standard		Ŧ	Loan Number	: 69823-1	2699	-
Closing Da	te: 07/03/20	)17		Loan Amount		150,0	00.00
Covered	Party	Address T	уре	Line 1	Line 2	City	Sta
<b>V</b>	Lender		•				
<b>v</b>	Buyer/Borrower	Current	-	123 Anywhere Str		Fort Gain	GA
	Seller	Property	•	456 Somewhere		Phoenix	AZ
•							- F
-	otection Letter O Firm Locations o			🔲 Use Miss	ouri CPI		
List I	Firm Signatories	on Attachm	ent	Alternate File	No:		

Protection Letter by using the **Address Type** drop-down box provided. Click on **Next** to continue.

**Note:** Available options on CPL screens are determined by the AgentNet credentials used to log in, along with the Property State.

The **Lender Selection** screen will display the **Lender** from the Impact/SQL file (labeled "ProForm" in the **Source** column) and any Lenders stored within the AgentNet "My Lenders" list. Highlight the Lender to be covered on the CPL, enter the **Lender Clause** and click **Submit** to continue.

**NOTE:** There must be an address entered on the file for the Lender.

**NOTE 2:** Checking **Save to "My Lenders" list on AgentNet** will save the selected lender in AgentNet.

Lender Selection		First American Ti	tle™
Source Name		City	*
ProForm Bank of the West		Walnut Creek	=
AgentNet Bank of America		Raleigh	
AgentNet Network Funding, LP		Fleming Island	
AcostNot Rade National Rade		Calumbus	Ŧ
Selected Lender:	Attn:	Manon Williams	
Bank of the West	Phone:	(925) 975-3878	
Mortgage Operations Center, 1450 Treat Blvd Walnut Creek, CA 94509	Fax:	(925) 256-1497	
	Email:		
Lender Clause: Bank of the West, ISAOA, ATIMA			
Save to "My Lenders" list on AgentNet			
	Back	Submit Cance	1

Where applicable, the **Approved Attorney Selection** screen will allow you to select your default Attorney from **AgentNet** or you can search for an Attorney by entering their name and city. Click **Search/Submit** to continue.

W AgentNet - Closing Protection Letter - AGNETNE	TDEMO-1006
Approved Attorney Selection	First American Title"
Use Default Attorney SoftPro 987 Sample Drive Suite 100 Tampa, FL 12112	
Search for Attorney	
Attorney Name: Attorney City: Attorney State: NC	
Bi	uck Submit Cancel

AgentNet will immediately return the Closing Protection Letter(s) and present the **Review Closing Protection** Letter(s) screen.

Sending data to AgentNet	

Review	ew - SP	361474			×
Review Closing Protection Letter(s)					
Doc	ument	s			
View	Сору	Document Name	File Name	File Size	Transferred
A		CPL-25002552_4c72e670	CPL-25002552_4c72e670	264247	100%

The **Review Closing Protection Letter(s)** screen allows you to view the document(s) by clicking on the Adobe Acrobat<sup>®</sup> icon to the left of each listing, under the **View** column heading.

You can copy the document to your Windows Clipboard, by clicking on the document icon under the **Copy** column heading.

Click on the **Accept** button to add the document(s) to your Impact/SQL file.

The document(s) will be available in your **User Attachments** widget where it may be printed, emailed or published to a document retention system.

E <u>A</u> dd Document	5 🕶	≽ Print Selected 🛛 🛃 Email Selected 📑 Publish Selected 📑 Remove All		
SP360004 SP360106	*	✓ Document	Date Added	
SP360115 SP360115 SP360437 SP360641 SP361464 SP361464 SP361465 SP361466 SP361474	Ŧ	✓ CPL-25002552_4c72e670-d572-483f-a3ad-537f60763c81	2/1/2017 10:12 AM	<u>i</u> đ

## How to Request a Jacket from AgentNet

To order a Jacket, click the Add Product icon at the bottom of the Title Services screen. On the Available Products screen, select Jacket. The Add/Select Policies screen will allow you to choose from Loan (if there are multiple loans they will be available in the Loan drop-down), Owner, or Guarantee jackets. Policies may be selected or removed by clicking on the Add Policy or Remove Selected Policy button. Make your selection(s) and click on the Next button to continue.

🥹 AgentN	et - Policy Jacket - SP361474			×
Add/Se	elect Policies		First American Ti	tle™
Add/Sel	ect Jackets to be issued:			
Include	e Jackets		Loan	
	Loan	•	First Loan 💌	
	Owner	-	-	
	Guarantee	-		
Add	Policy Remove Selected Policy	-		
			<u>N</u> ext <u>C</u> ance	

The **Jacket Type Selection** screen will be presented and allow you to select the type of Jacket. The options provided are based on your **AgentNet** account. Make your selection and click on the **Next** button to continue.

🖦 AgentNet - Policy Jacket - SP361474	<b>•••</b>
Loan Jacket Type Selection	First American Title™
1.) Loan	
ALTA Expanded Cov Res Loan Policy (4.0/5.0)(4th Ger ALTA Expanded Cov Res Loan Policy (4.1/5.1)[4th Ger ALTA Loan Policy (6-17-06) ALTA Res Limited Cov Mortgage Mod (12-1-14) ALTA Res Litd Cov Jr Loan Policy (10-19-96) ALTA Shot Form Exp Cov Res Loan Policy (EAGLE Re ALTA Shot Form Exp Cov Res Loan Policy (EAGLE Re ALTA Shot Form Res Loan Policy (Rev. 6-16-07)(A&B)	n. EAGLE](Rev. 7-26-10) :v. 7-26-10) Sch B
Back	K Next Cancel

AgentNet - Policy Jac	:ket - SP361474		
Loan Jacket Inform	ation	S	First American Title"
1.) Loan - ALTA Expa	anded Cov Res Loan Policy (4	4.0/5.0)(4th Gen. E	AGLE)(Rev. 7-26-10)
Name	Value		
Loan Number	69823-12699		
Policy Amount	150,000.00		
Date of Policy	02/01/2017 10:51 AM		
Include Agent Addre	ss Yes		-
		Back Sub	omit <u>C</u> ancel

Based on the type of jacket you select, the Jacket Information screen will display applicable information from vour Impact/SQL file. Additional information, such as the Date of Policy, may be completed by using the calendar dropdown. Also based on the jacket selection, you may need to select endorsements to associate with the jacket. Once all required information is provided, click on the Submit button to continue.

**AgentNet** will immediately return the Jacket. The **Review Policies** screen allows you to view the document(s) and jacket number(s) that are returned. Click on the **Accept** button to add the document(s) and jacket number(s) to your Impact/SQL file. The document(s) will be available in your **User Attachments** widget where they may be printed, emailed or published to a document retention system.

🔤 Revi	iew - SP	361474				<b>—</b> ×
Re	Review Policies First American Title*					
📀 Po	licy Nu	mbers				Show Field Codes
<b>V</b>	Name		Curre	ent Value	New Value	
<b>V</b>	Loan Po	olicy			5020900-0010	623e 📝
	cument View	s Copy	Document Name	File Name	File Size	Transferred
<b>V</b>	A		LP-25002553_	LP-25002553pdf	189.98 KB	100%
					Accept	Close

Accepted jacket number(s) will be entered onto the policy(ies) in the **Create Policy** screen in Impact/SQL.

Create Policy					×
👍 <u>N</u> ew Polic	y 📝 Edit Policies 🛛 🚵 Print Selected	🖉 Email Selected  🗟 Pub	olish Selected		
Escrow File	#: SP361474		Branch: 001 - E	scrow Branch(ET	Mapped)
Title Offic	er:	Escrow	Officer: JHE-J	udith Hedges EO	
Property: 45	6 Somewhere Ave, Phoenix, AZ 85029		•	[	
Status	Policy Description	Policy Number	Pro Forma	Date	Amount
Pending	ALTA Lender's Policy	5020900-0010623E			150,000.00 🖉 🗙

# How to Request Rates & Fees from AgentNet

To order Rates and Fees for Policies, Endorsements and CPLs, click the **Add Product** icon at the bottom of the **Title Services** Screen. On the **Available Products** screen select **Rates and Fees**. The Rates and Fees product allows you to **price** products already ordered through **AgentNet**, such as CPLs and Policies. You can also receive a quote, or **pre-pricing** request, for products you have yet to order from **AgentNet**. In certain States, there are fees associated with the issuance of CPLs and in others there are not. You will only be presented with the CPL related screens if there are fees associated with the issuance of CPLs.

🥯 AgentNet - Rates and Fees	- SP361474			
Rates and Fees	First American Title"			
S	ielect products to be priced			
Policies				
	Closing Protection Letters			
	Ø Both			
	Back Next Cancel			

For **Pre-Pricing** requests in States where CPLs fees are applicable, the **Rates and Fees** screen will be presented. You will have the option to select whether to price **Policies**, **CPLs**, or **Both**.

#### **IMPORTANT NOTICE:**

Endorsements can only be priced if added to the Impact/SQL file. Add any endorsements you wish to price to your Impact/SQL file prior to launching the **AgentNet** product.

Make your selection and hit the **Next** button. In certain States different or multiple covered parties can be selected. If you select CPL or Both on

the previous screen and there is a choice of covered parties, you will be presented with the **Closing Protection Letter Information** screen.

🥹 AgentNet - Rates	AgentNet - Rates and Fees - SP361474			
Closing Protecti	Closing Protection Letter Information			
Letter Type	Standard	<b>•</b>		
Parties	Lender			
	Buyer/Borrower			
	Seller			
		Back Next Cancel		

Select the appropriate choice, among Lender, Buyer/Borrower, Seller, and then click the Next button at the bottom of the Closing Protection Letter Information screen.

On the **Jacket Selection** screen choose from **Simultaneous**, **Lender** (if you have multiple loans they will be available in the drop-down box) or **Owner** jackets. Click **Next** to continue.

🥹 AgentNet - Rates and Fees - SP3614	174
Jacket Selection	First American Title"
Select the	e Jacket to be Issued:
	Simultaneous
	C Lender
	First Loan 👻
	Owner
	Back Next Cancel

If you selected **Lender** Policy on the **Jacket Selection** screen you will be presented with the **Loan Policy Information** screen. The screen will be populated with information from your Impact/SQL file. If **Pre-Pricing** request, the appropriate policy form to be priced from the **Form Type** drop-down in the middle of the screen will need to be selected. If **Post-Pricing** request, the Form Type will be displayed on the screen.

Policy Number 5	Loan Policy
Policy Number 5	Loan Policy
	5020900-0010623E
Form Type	ALTA Loan Policy (6-17-06)
Extended Coverage	No 👻
Policy Date (	02/01/2017
Rate Type E	Basic 💌
Coverage Amount 1	150,000.00
Endorsements E	END1
E	END2
Rate Effective Date	
	Back Next Cancel

Then select the appropriate Rate Type from the **Rate Type** drop-down. If **Pre-Pricing** request, you may modify the information contained on the screen. Click **Next** to continue.

If you have selected **Owner** Policy or **Simultaneous** on the **Jacket Selection** screen you will be presented with the **Owner's Policy Information** screen. The screen will be populated with information from your Impact/SQL order. If **Pre-Pricing** request, the approprate policy form to be priced from the **Form Type** drop-down in the middle of the screen will need to be selected. If **Post-Pricing** request, the Form Type will be displayed on the screen.

Then select the appropriate Rate Type from the **Rate Type** drop-down. If **Pre-Pricing** request, you may modify the information contained on the screen. Click **Submit** to continue.

📝 Rate Effective Date	
Rate Effective Date:	
(Optional - system uses and fees unless this date	Date of Policy for calculation of premium a is selected)
	OK Cancel

AgentNet - Rates and	I Fees - SP361474
Owners Policy Info	rmation First American Title"
Policy Type	Owner's Policy
Form Type	ALTA Homeowners Policy(4th Gen. EAGLE)(Rev. 2-3-10)
Policy Date	05/19/2017
Rate Type	Basic 🔹
Coverage Amount	180,000.00
Rate Effective Date	
	Back Submit Cancel

**OPTIONAL:** You may also select the blue link at the bottom lefthand corner of the screen to set the **Rate Effective Date**. If selected, you will be presented with the **Rate Effective Date** dialogue where you can enter the date for calculation of premium and fees. Click **OK** or **Cancel** to return to the **Policy Information** screen.

In the event that additional questions are needed to be answered to accurately price the products, you will be presented with the **Additional Questions** screen. The questions will be grouped by the product to which they pertain. Once the questions have been answered, you may click **Submit** to request your Rates & Fees.

AgentNet - Rates and Fees - 2014060786	×
Additional Questions	First American Title*
ALTA Owner Policy (6-17-06)	
ALTA Endorsement 3-06 (Zoning)	
Does a Reissue or Refinance credit apply to this endorsement?	Yes 🔻
Does a Simultaneous issue credit apply to this endorsement?	Yes ▼ ≡
ALTA Loan Policy (6-17-06)	
ALTA Endorsement 9-06 (Restrictions, Encroachments, Minerals - Loan Policy)	
Does a Reissue or Refinance credit apply to this endorsement?	Yes
Does a Simultaneous issue credit apply to this endorsement?	Yes 🔻
CPI Standard	· · · · · · · · · · · · · · · · · · ·
Back	Submit Cancel
DdCk	Calicer

🥶 AgentNet - Rates and Fees - SP361474	<b>•</b>
Endorsement Matching	First American Title"
AgentNet was unable to identify pricing for th following reasons:	e endorsements listed below due to the
<ol> <li>The endorsements are not configured prop</li> <li>The endorsements are not valid for the pol</li> </ol>	
Please contract ASC for assistance (866) 70	
END1 END2	
	Copy to Clipboard
	Back Next Cancel

If the product cannot match the endorsements from your Impact/SQL file or if those endorsements are not available for the Policy Forms to which they were attached, you will be presented with the **Endorsement Matching** screen. The screen will have instructions on how to resolve the issue and note exactly which Endorsements from your file were unable to be priced. Click **Next**.

**AgentNet** will immediately return the Rates & Fees for the products requested. The **Review** screen allows you to view the premium(s), fee(s), and document(s) that are returned. The **Review** screen has three Tabs on it, **Default**, **Override**, and **Document**. The State your Impact/SQL file is in will determine which Tab will be presented to you by default. Some users will have the **Default** Tab presented, others may have the **Override** Tab presented. Users can toggle between the tabs regardless of which tab was presented to them by default.

You can have the Split Amounts written to the Impact/SQL file by checking the **Write Split Amounts to Order** Check Box.

eview - SP361474 Default Override Docur	ment								×
🖾 Select All 📃 Select	Select All Select None Her Field Codes Write Split Amounts to Order								
All	<b>V</b>	Name	Calculated	Premium	Agent Amt	Net	TRID	Charge	
···· CPL ···· Owners Policy	<b>V</b>	CPL Standard (Lender)	\$25.00	\$25.00	\$0.00	\$25.00		Next Available Title Cha	
Loan Policy	1	CPL Standard (Lender)	\$25.00	\$25.00	\$0.00	\$25.00		Next Available Title Cha	
	1	ALTA Homeowners Poli	\$1,096.00	\$1,096.00	\$767.20	\$328.80	\$545.00		
	V	ALTA Expanded Cov R	\$715.00	\$715.00	\$500.50	\$214.50	\$1,266.00		2
							Update	Clo	se

You may **Override** the Premiums and Fees returned by **AgentNet** in two ways. On the **Default** Tab, you can Click on the **Edit** Icon on the far right of each Premium and Fee returned. This will bring up the **Override** Dialogue.

📝 Override				×
Calculated 1,096.00	Override Amount	*	Override Reason Select   Override Cancel	) <b>*</b>

You may enter an **Override Amount** and then must select the appropriate **Override Reason** from the drop-down provided. Then Click **Override** or **Cancel** to return to the **Review** screen.

Review - SP361474	ment							8
	t None   🗮 Field Codes						Write Split Amounts to Or	der
All CPL Owners Policy Loan Policy	CPL Standard (Lender)       ALTA Homeowners Policy(       Override       Calculated     Over	Calculated \$25.00 \$1,096.00 rride Amount 00.00	: O` U U N Pr R Pr In A A	Agent Amt \$0.00 \$0.00 \$767.20 verride Rease rederwriting Ar Select - nderwriting Ar we Rate Filmo Area System Ur usiness Segm emium Split creased Liabi lowable Surch lowable Surch lowable Disco or More Simul	oproved Over poroved Over to Not Availab der navailable ent Pricing lity Premium narge punt	ride le	Charge Next Available Title Ch Next Available Title Ch	
						Update	Accept Clos	e

On the **Override** Tab, you can enter Override Amounts on each line and select the Override Reason and then Click **Update** to send the information to **AgentNet**.

Name	Calculated	Premium	Override Amount	Override Reason	
CPL Standard (Lender)	\$25.00	\$25.00		Select	-
CPL Standard (Lender)	\$25.00	\$25.00		Select	-
ALTA Homeowners Policy(4th Gen. EAGL	\$1,096.00	\$1,096.00	1,000.00	Underwriting Approved Override	-
ALTA Expanded Cov Res Loan Policy (4.0	\$715.00	\$715.00		Select	-

If one or all of the premiums or fees have been overridden, the product will send the updated information to **AgentNet** for reporting and recalculation of Split Amounts.

On the **Documents** Tab, you may view the Document returned from **AgentNet**. You may copy the PDF to your Clipboard by Selecting the **Copy** Icon. You may also view the PDF by Clicking on the **PDF** Icon.

😔 Review - SP361474			<b>—</b>
Default Override Document			
Documents			
View Copy Document Name	File Name	File Size	Transferred
RatesFees_6a3aefc7	RatesFees_6a3aefc7.pdf	110285	100%
	Update	Accept	Close
	opulie		

Click **Accept** to add the document, premium(s), fee(s) to your Impact/SQL file. The document(s) will be available in your **User Attachments** widget where they may be printed, emailed or published to a document retention system. Accepted jacket number(s) will be available within the Impact/SQL order.

The Information returned from **AgentNet** can also be viewed in the **Log** of the SoftPro 360 Transaction. The **Log** can be accessed through the **SoftPro 360 Queue**.

Created On	Created By	Message
5/19/2017 2:33:20 PM	schance@digisolaz.com	Operation Submit requested
5/19/2017 2:33:42 PM	schance@digisolaz.com	CPL Standard (Lender)Gross:\$25.00.
5/19/2017 2:33:42 PM	schance@digisolaz.com	Operation Update requested
5/19/2017 2:38:17 PM	schance@digisolaz.com	Operation Accept requested
5/19/2017 2:38:17 PM	schance@digisolaz.com	CPL Standard (Lender)Gross:\$25.00.
CPL Standard (Lender)		
CPL Standard (Lender) Gross: Calculated Value: Agent Amount:	\$25.00 \$25.00 \$0.00	
Gross: Calculated Value: Agent Amount: Net Amount:	\$25.00	
Gross: Calculated Value: Agent Amount:	\$25.00 \$0.00	

Select the Transaction in the Queue for the Rates and Fees Service and then Click the Log Button.

## How to Submit a Request for an SDN (Specially Designated Nationals) Search

🥹 AgentNet - SDN Search - SP361474	
Search Selection	First American Title
Select the people to search on the Special	ly Designated Nationals (SDN) List
☑ Name	
Harold Night	
Steve Coleman	
Bank of the West	
🛛 💶 Manon Williams	
4 out of 4 selected.	
Add Name	Submit Close
Aud Name	Submit

To order an SDN Search, click the Add Product icon at the bottom of the Title Services screen. On the Available Products screen select SDN Search. The Search Selection screen will allow you to choose from parties and contacts in your Impact/SQL file to search against the U.S. Treasury's Specially Designated Nationals list. Buyers, Sellers, Lenders and Payoff Lenders will pull from your Impact/SQL file.

You can also manually add names to search by selecting the
Add Name button on the bottom left corner of the screen.
Enter the name and click on the Add button to add the party
to the search listing.

🥶 Add Name		×
Name John Doe		
John Doel	Add Car	icel

Once all parties have been identified on the **Search Selection** screen, click on the **Submit** button to continue.

AgentNet will immediately return the results of the search. The Search Results screen allows you to view the results and the document that is returned. Click on the Accept button to add the document to your Impact/SQL file. The document will be available in your User Attachments widget where it may be printed, emailed or published to a document retention system.

📑 Add Documents 👻 🌦 Print Selected 🛛 😽 Email Selected 📑 Publish Selected 📑 Remove A

LP-25002553

CPL-25002552\_4c72e670-d572-483f-a3ad-537f60763c81

Document

🕹 Age	entNet - S	DN Sear	ch - SP3614	74					
Se	arch Re	sults					S	First	American Title
	Name					Result			
В		d Night				No Ma	tch thru 2/	1/2017	1:15:20 PM
S	Steve	Coleman	n		1	No Ma	atch thru 2/	1/2017	1:15:20 PM
L.	Bank d	of the We	est		~	No Ma	tch thru 2/	1/2017	1:15:20 PM
L	Mano	n Willia	ms		1	No Ma	atch thru 2/	1/2017	1:15:20 PM
	The doc	ument be	low will be a	attached	d and s	aved to	the ProForm	order or	nce accepted.
	ocuments	1				aved to		n order or	
Do View		Docume	elow will be a ent Name 2361474 201	File Na	ame		File Size	n order or 7.19 KB	nce accepted. Transferred 100%
View	Copy	Docume	ent Name	File Na	ame		File Size	7.19 KB	Transferred
View	Copy	Docume	ent Name	File Na	ame		File Size		Transferred
View	Copy	Docume	ent Name 2361474_201	File Na	ame		File Size	7.19 KB	Transferred
View	Copy	Docume SDN_SP	ent Name 2361474_201	File Na	ame		File Size	7.19 KB	Transferred
View	Copy	Docume SDN_SP	ent Name 2361474_201	File Na SDN_S	ame		File Size	7.19 KB	Transferred
View	Copy	Docume SDN_SP	ent Name '361474_20'	File Na SDN_S	ame		File Size	7.19 KB	Transferred

User Attachments

SP360004 SP360106 SP360115 SP360119 SP360437 SP360437 SP360441 SP361464 SP361464

SP361465 SP361466

## How to Request Searches and Commitments from AgentNet

To order Searches and Commitments, click the Add Product icon at the bottom of the Title Services screen. On the Available Products screen select SDN Search. The Data Review screen will present with the fields preentered with data from your Impact/SQL file. Click Next.

🥶 AgentNet - Searches and	d Commitments - SP361474
Data Review	First American Title"
The following data will	be sent to AgentNet.
Business Segment:	Residential
Transaction Type:	Sale w/Mortgage
Sales Price:	\$180,000.00
Loan:	69823-12699 🔹
Loan Amount:	\$150,000.00
Lender Name:	Bank of the West
	Back Next Cancel

The **Service Selection** screen allows you to choose the products you want to order. The **Email Notification** field will need to be completed with a valid email address of the person to receive notifications from **AgentNet**. If you select **Ownership & Encumbrances Report**, you will need to click on the **View Disclaimers** button and review the information presented before continuing.

🥌 AgentNet - Search	ies and Commitments - SP361474
Service Selection	First American Title™
Order Property	Type: Single Family Residence 🔻
Email Notifica	ation: schance@digisolaz.com
Select	Product(s):
Agent N	et Search Product
Owners	nip & Encumbrances Report
Prelim	
	ill be provided by the Agency Services office servicing your state. An evenent may be required.       View Disclaimers      Back    Next

🖳 DisclaimerDialog	
Ownership & Encumbrances Report	
IMPORTANT - READ CAREFULLY: This report is not an insured product or service or a representation of the condition of title to real property. Recipient agrees that the use of this report is at its own risk. This report is not a legal opinion, opinion of title, title insurance commitment or preliminary report, or any form of title insurance or guaranty. First American does not assume abstractor liability under this report. First American does not represent or warrant that the information provided in this report is complete or free from error, and the report is provided without warranties of any kind. As a material part of the consideration given in exchange for the issuance of this report, recipient agrees that First American's sole liability for any loss or damage caused by an error or omission due to inaccurate information in this report is limited to the fee charged for the report. Recipient accepts this report with this limitation of liability described above. Recipient further agrees that this report may not be Back Next Close	Required Disclaimers
	In order to continue you must accept the disclaimer(s) for Ownership & Encumbrances Report. Do you still want to close this window?
Click <b>Close</b> to return to the <b>Service Selection</b> screen. To proceed, acknowledge the statement "Search fees will be	<u>Y</u> es <u>No</u>

provided by the Agency Services office servicing your

state. An additional agreement may be required" by checking the checkbox and then click **Next**.

	let - Searches and ocument(s)	Commitments -	SP361474	Ô	<b>First American Title™</b>
Doc	uments				
	Name Test Doc Generic	Status Pending	Size	81.00 KB	Browse       Attachment       Documents       Hename       Delete
The	ere is a maximum fil	le size of 12MB.	<u>B</u> ack		ext <u>C</u> ancel

The Add Document(s) screen allows users to add documents to be submitted to AgentNet. Click the Browse button to browse out to a file/folder location. Click the Attachment button to select a document from the User Attachments widget. Click the ReadyDoc button to open an Impact/SQL document or only) smartView-stored (FNF sites document. The Rename button will rename the highlighted document while the Delete button will delete the highlighted document from the list. Once all desired documents have been added to the list, click Next to continue.

🥹 AgentNet - Searches and Commitments - SP361474	<b>•</b>
Add Note(s)	First American Title"
Notes	Show ProForm Notes
Status Text	Send New
Pending New note.	
	Remove
Nete Test	Add to ProForm Notes
Note Text:	Add to Floronn Notes
New Hole.	
	-
Bac	k Submit <u>C</u> ancel

If desired, the user may add notes relating to the transaction by clicking the **New** button on the **Add Note(s)** screen. Enter the new note by clicking in the **Note Text** box and typing the note. The new note will be added to the **Notes** list.

By default, the notes entered in the Impact/SQL file will also be displayed in the **Notes** list. The Impact/SQL notes may be hidden in the **Notes** list by unchecking the **Show ProForm Notes** checkbox. The user may select the notes to be sent to **AgentNet** by checking the box in the **Send** column. Any new note added on this screen will by default be saved to Impact/SQL file notes unless the **Add to ProForm Notes** checkbox is unchecked.

Click **Submit** to order the products from **AgentNet**.

e AgentNet - Searches and Commitments -	SP361474	<b>EX</b>
Order Progress	First Americ	an Title"
Sending data to AgentNet		
	Back Next	Cancel
	<u>Back</u>	

🥶 AgentNet - Searches and Commitments - SP361474	<b>EX</b>
Order Progress	First American Title"
The order(s) were successfully submitted to AgentNet.	
	Close

The completed product requests will be reflected on the Title Services screen as well as the SoftPro 360 widget.

	Net - SP361474					<u> </u>
Title	Services			1	×	First American Title"
Action	Product	Туре	Insured	Amount	Status	Created On
	Searches and Commitments	Prelim			In Progress	7/31/2017 2:59 PM
	Searches and Commitments	Ownership			In Progress	7/31/2017 2:58 PM
	Searches and Commitments	AgentNet			In Progress	7/31/2017 2:58 PM
	Id Product X Cancel	Status			AgentNe	et File Information

SoftPro (3) A	0 🖂 🔳	Views: Active 0	rder 👤	🚖 New Product 🏄 🍷 Filter:	🖉 Logoff	
	Status	Linked Order	Created On	Description	Service	
\$	In Progress	SP361474	07/31/2017 02:59 PM	4711 Prelim	Searches and Commitments	0 🐺
\$	In Progress	SP361474	07/31/2017 02:58 PM	4710 Ownership & Encumbrances Report	Searches and Commitments	i 🙀
\$	In Progress	SP361474	07/31/2017 02:58 PM	4709 AgentNet Search Product	Searches and Commitments	i 🙀

## How to Upload a Policy Image to AgentNet

To upload a title policy image to AgentNet, click the **Add Product** icon at the bottom of the **Title Services** screen. On the **Available Products** screen select **Policy Image Upload**.

The Add Document(s) screen allows users to add documents to be submitted to AgentNet. Click the Browse button to browse out to a file/folder location. Click the Attachment button to select a document from the User Attachments widget. Click the ReadyDoc button to open an Impact/SQL document or smartView-stored (FNF sites only) document. The Rename button will rename the highlighted document while the Delete button will delete the highlighted document from the list. Once all desired documents have been added to the list, click Submit to upload the document(s).

 AgentNet - Policy Image Upload - SP361474			<b>—</b>
Add Document(s)		Fir	st American Title™
Documents:			
Name	Status	Size	
Test Policy.pdf	Pending	82 KB	Br <u>o</u> wse
			Attachment
			Docu <u>m</u> ents
			Rename
			Delete
There is a maximum file size of 15 MB			
		<u>S</u> ubmit	<u>C</u> ancel

The uploaded policy will be saved in your **User Attachments** widget and for FNF sites, smartView as well. An entry will also be made in your SoftPro 360 widget.

User Attachments								$\overline{\mathbf{x}}$				
📑 Add Documents 👻	\$ Print Sel	ected 🚑 Em	ail Selected	Publish Selected	😫 Remove All							
SP360437			Do	cument		Date Added						
SP361464	CPL-250	02552_4c72e6	70-d572-483f-a3	ad-537f60763c81		2/1/2017 10:12 AM	🧕 🧕	2				
SP361465 SP361466	LP-2500	2553_				2/1/2017 10:59 AM	🧕 👔					
SP361474	SDN_SF	°361474_20170	201_131503			2/1/2017 11:20 AM	🧕 🧝	2				
	Test Pol					7/31/2017 3:18 PM	🔯 aje	2				
	SoftPre	o 360									<b>(</b> )	$\otimes$
		0	Views: Active C	Irder 💌	🔶 New Product 🛛 👫 🕎	Filter:				Logoff	_≣≣ <b>2</b> ↓	
	(3) A	ctive Order (	11) New/Ready									
		Status	Linked Order	Created On	Descriptio	n			Service			
	\$	In Progress	SP361474	07/31/2017 03:18 PM	Test Policy_20170731_18184160	2.pdf	Policy Ima	ge Upload	1			<b>0</b>

## How to Cancel a Transaction/File from AgentNet

To cancel a transaction, highlight the transaction on the **Title Services** screen then click the **Cancel** button.

Title	Services				×	First American Title™
Action	Product	Туре	Insured	Amount	Status	Created On
	Back Title				Accepted	7/2/2014 12:27 PM
	Closing Protection Letter	Standard	ABC Test Mort	123,456	Completed	7/2/2014 12:37 PM
	Jacket	Loan		870,000	Completed	7/2/2014 12:42 PM

To cancel the selected transaction click **Cancel Selected Product**.

To cancel the **AgentNet** file and all transactions associated with it, click **Cancel AgentNet File**.

