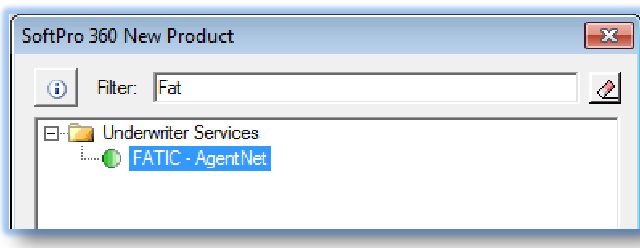
Managing AgentNet Transactions within the Impact/SQL Widget SoftPro 360

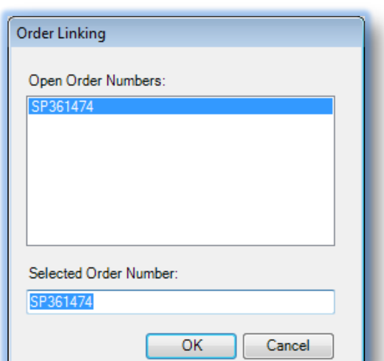
How to Submit a Transaction to AgentNet

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.





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

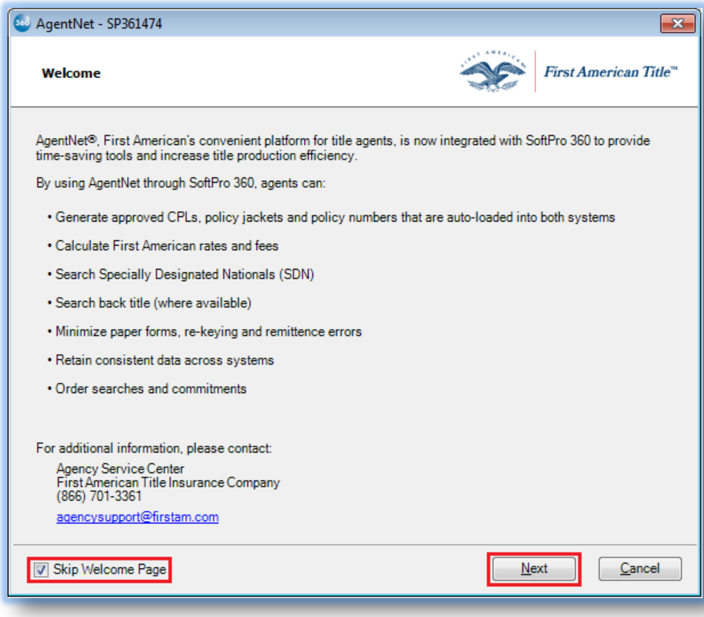
If you have an Impact/SQL file open on your desktop, it will be presented in the **Order Linking** dialog. The active order will be highlighted and entered in the **Selected Order Number** field. You could type in another file's number into the **Selected Order Number** field, but be careful not to get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

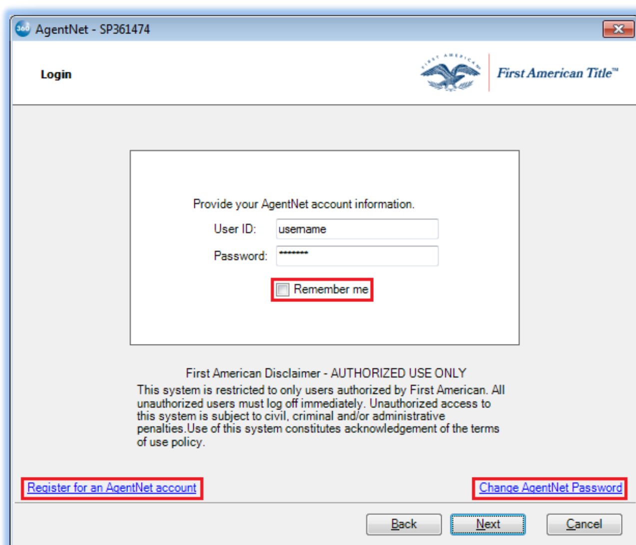
Once the file that is to be transacted with **AgentNet** is identified in the **Selected Order Number** field, click on **OK** to continue. Clicking on **Cancel** will terminate the order process.

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.



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**.

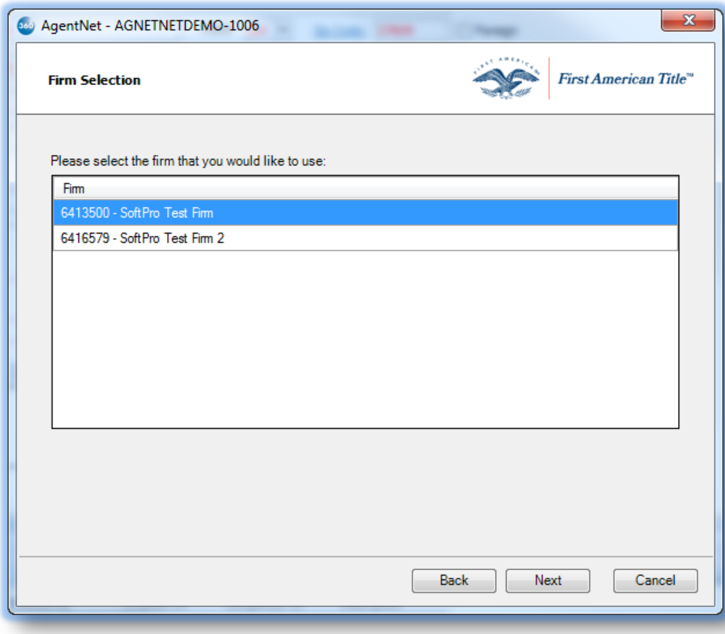


Agents that have not registered can click the **"Register for an AgentNet account"** link and follow the prompts to register. This documentation will assume you have gone through the registration process.

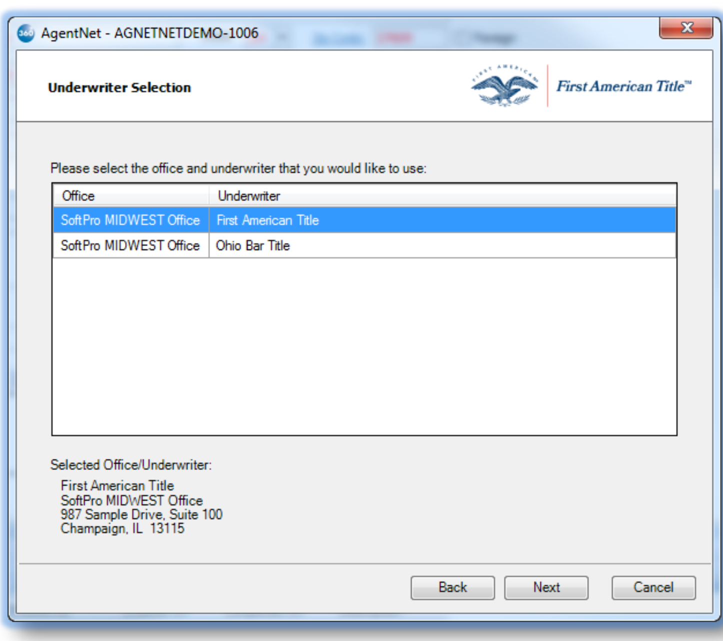
Users can change their **AgentNet Password** by clicking on the **"Change AgentNet Password"** link. Checking the **Remember Me** checkbox will skip the login screen on subsequent uses.

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.

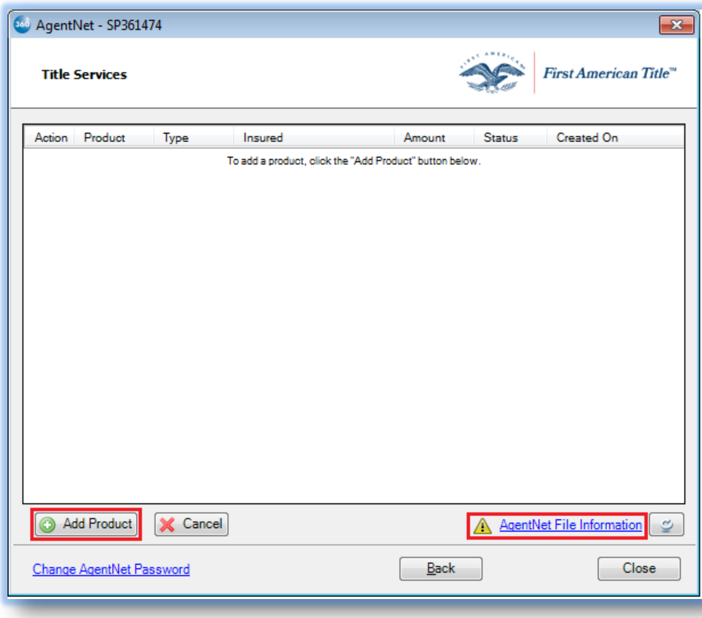


If you have multiple accounts, the **Underwriter Selection** screen will show a list of your available accounts. Select the account, and click **Next** to continue.

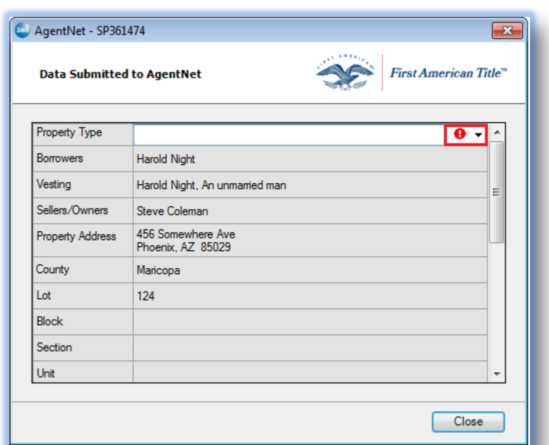


The next screen presented is the **Title Services** screen. This is the screen from which products will be ordered.

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.



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.



NOTE 2: The **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.

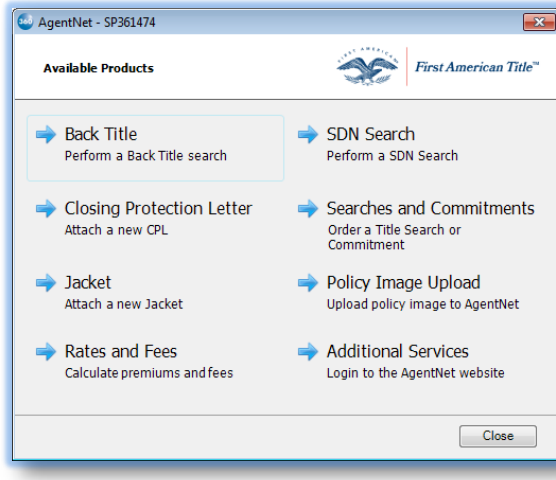
Once all required fields have been completed, the **Warning** icon will no longer present on the **Title Services** screen.

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

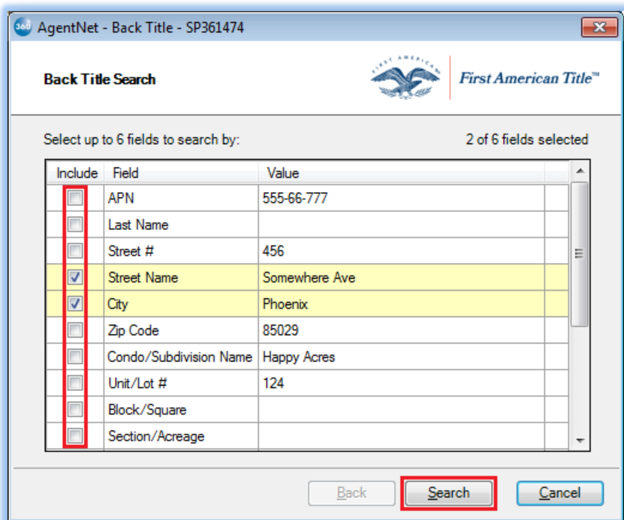
Click on **Cancel** to exit the **Title Services** screen. If you **Cancel**, you will be asked if you are cancelling the **Selected Product** or the **AgentNet File**. Select the desired option.

How to Submit a Request for Back Title to AgentNet

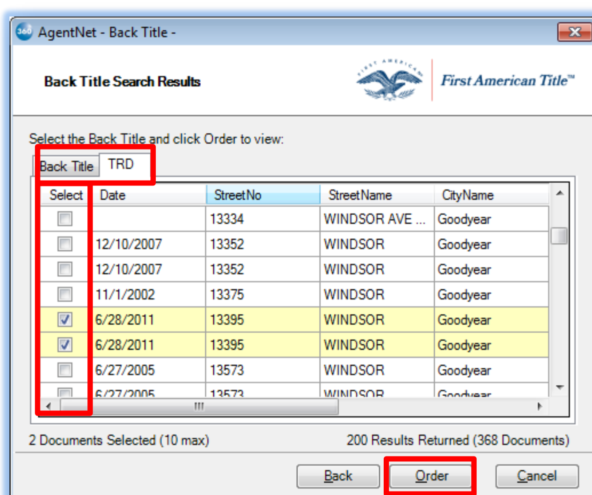
The **Add Product** button will bring up the **Available Products** screen, where you can select the product you wish to order, by clicking on the label for each.



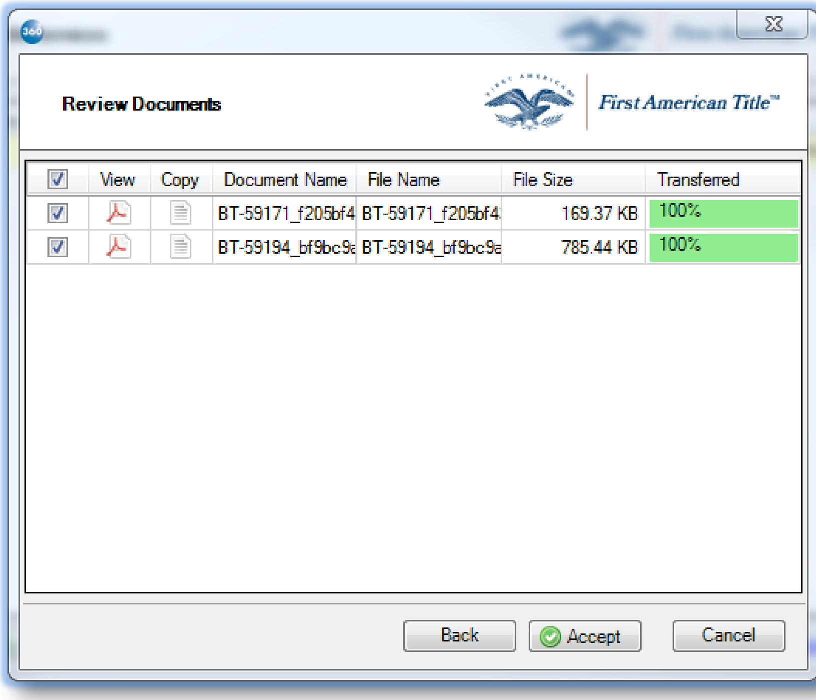
To order **Back Title**, where available, click on **Back Title** on the **Available Products** screen. The **Back Title Search** screen will be presented, with data values pulled from the file identified when logging in. It allows you to select up to six fields by which to search. Check the **Include**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



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

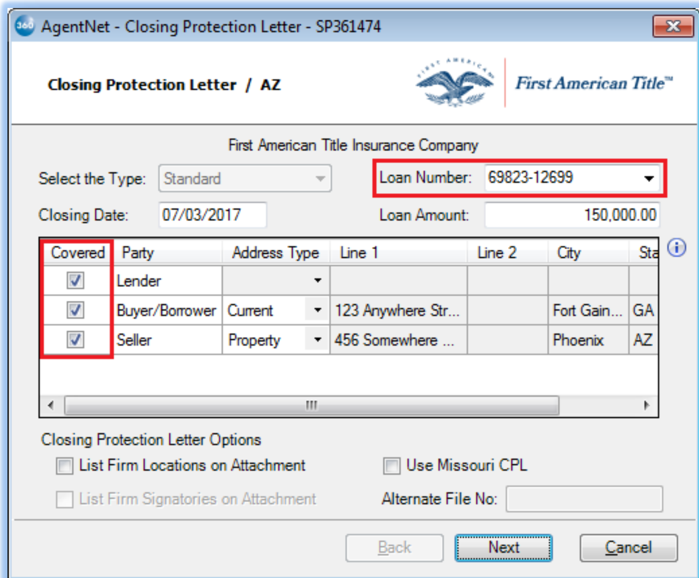


The document(s) will be available to you in your **User Attachments** widget where it may be printed, emailed or published to a document retention system.

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

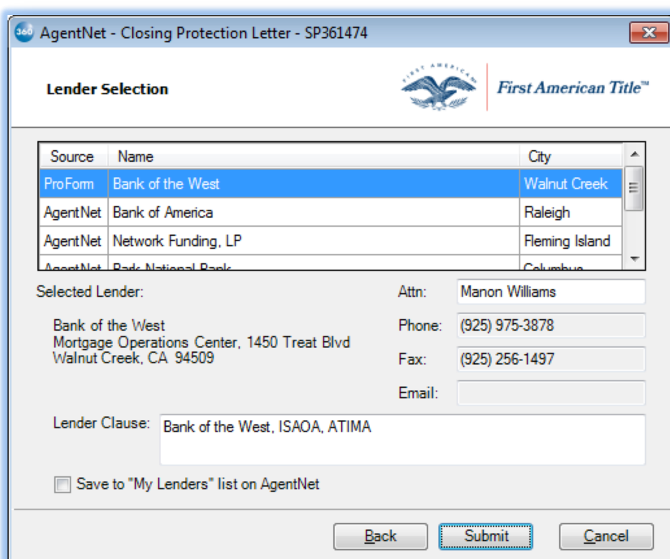


Note: Available options on CPL screens are determined by the AgentNet credentials used to log in, along with the Property State.

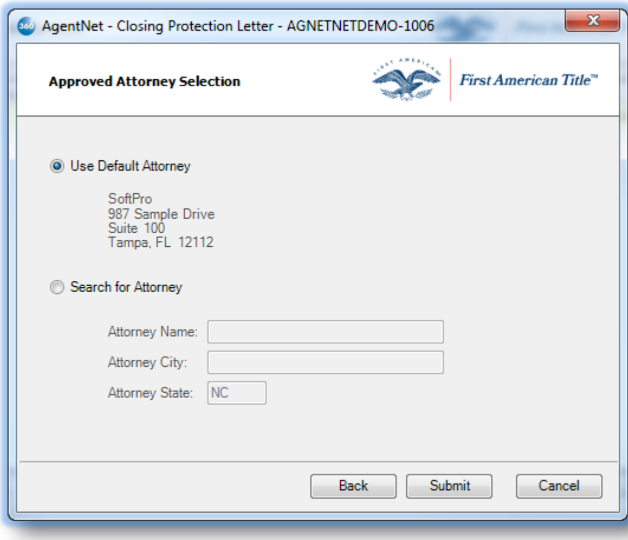
The **Lender Selection** screen will display the **Lender** from the Impact/SQL file (labeled "ProForm" in the **Source** column) and any Lenders stored within the AgentNet "My Lenders" list. Highlight the Lender to be covered on the CPL, enter the **Lender Clause** and click **Submit** to continue.

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

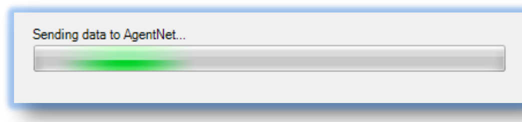
NOTE 2: Checking **Save to "My Lenders" list on AgentNet** will save the selected lender in AgentNet.

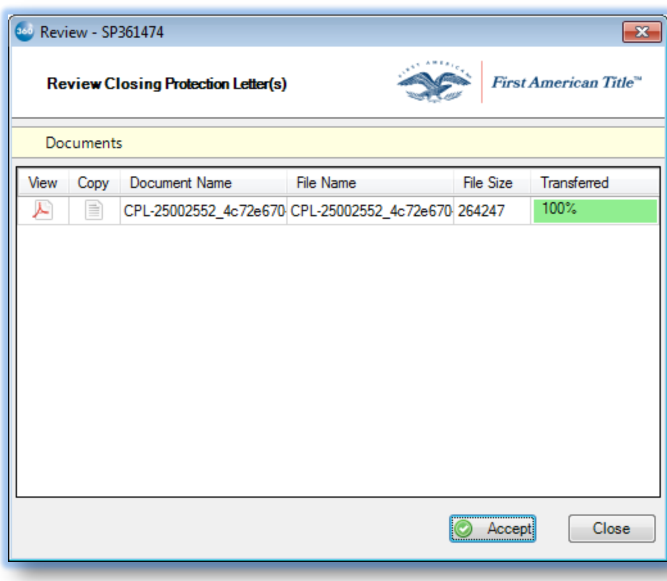


Where applicable, the **Approved Attorney Selection** screen will allow you to select your default Attorney from **AgentNet** or you can search for an Attorney by entering their name and city. Click **Search/Submit** to continue.



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



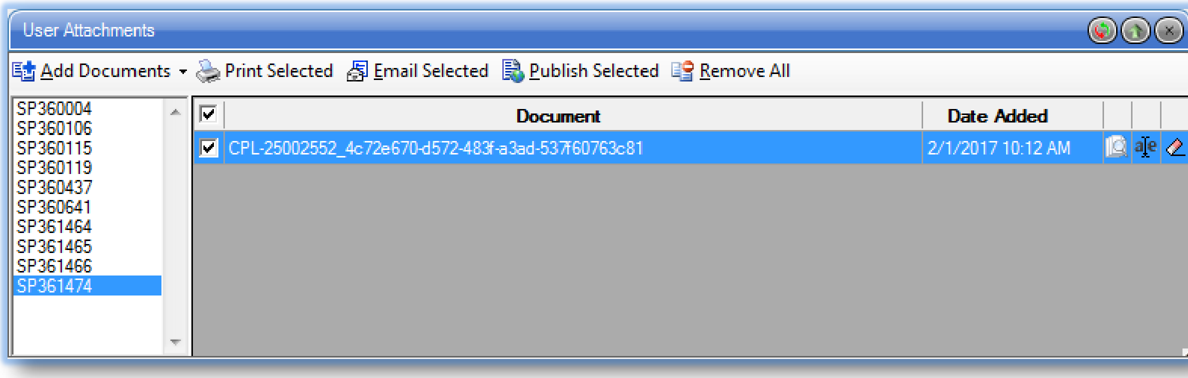


The **Review Closing Protection Letter(s)** screen allows you to view the document(s) by clicking on the Adobe Acrobat® icon to the left of each listing, under the **View** column heading.

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

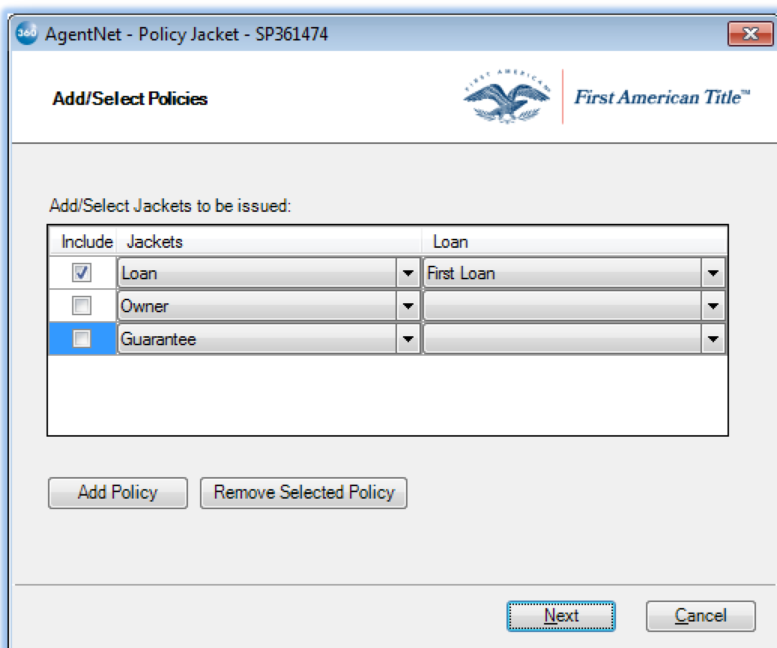
Click on the **Accept** button to add the document(s) to your Impact/SQL file.

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

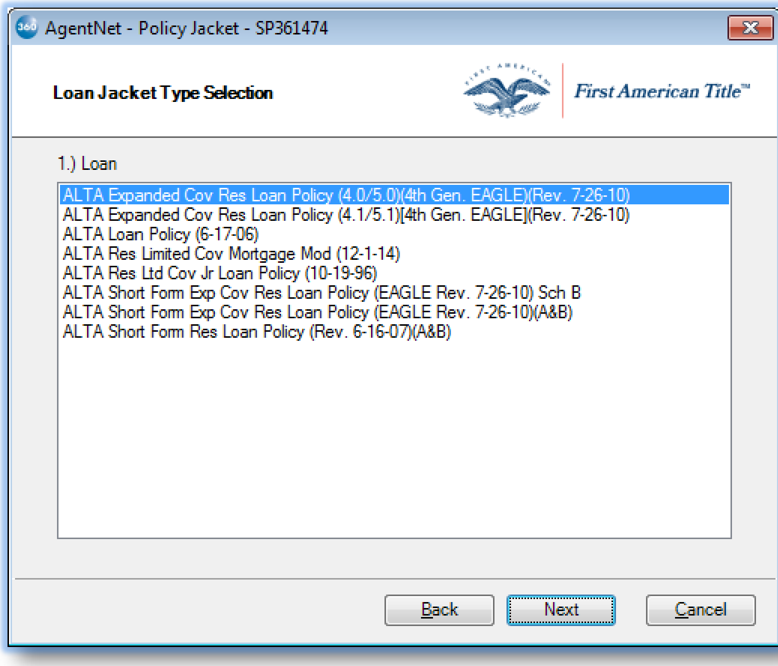


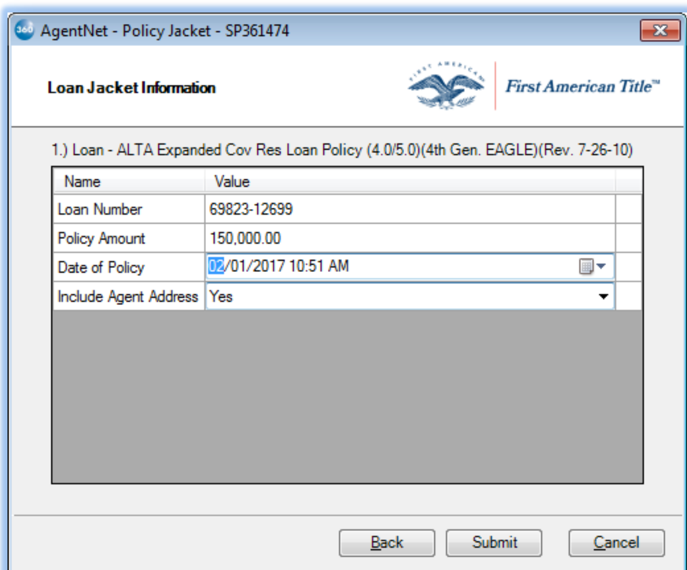
How to Request a Jacket from AgentNet

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.



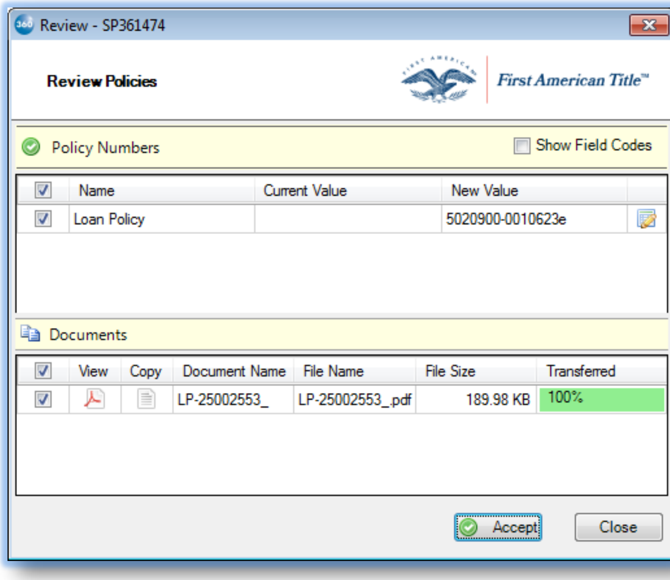
The **Jacket Type Selection** screen will be presented and allow you to select the type of Jacket. The options provided are based on your **AgentNet** account. Make your selection and click on the **Next** button to continue.



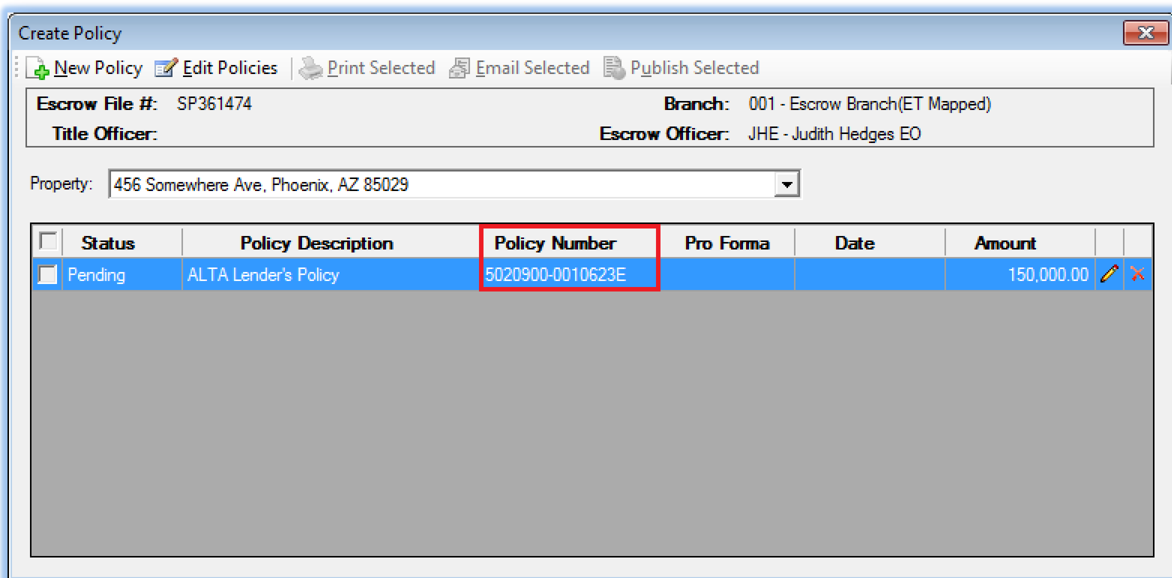


Based on the type of jacket you select, the **Jacket Information** screen will display applicable information from your Impact/SQL file. Additional information, such as the **Date of Policy**, may be completed by using the calendar drop-down. Also based on the jacket selection, you may need to select 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.

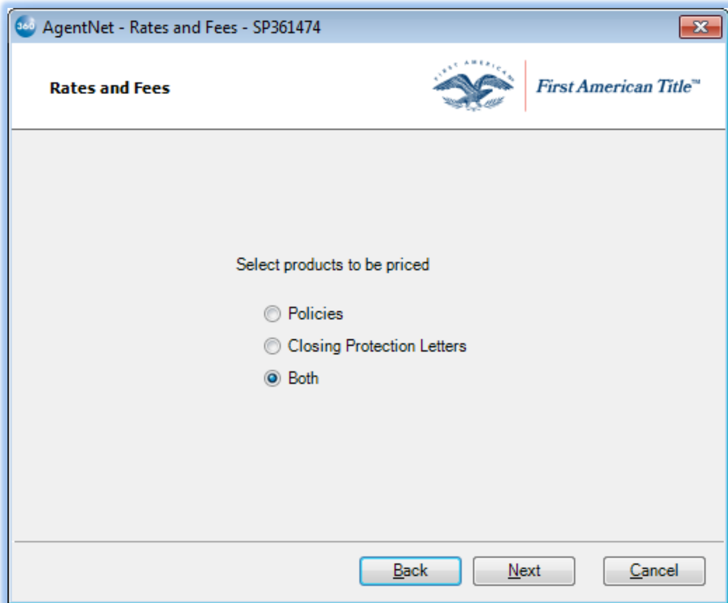


Accepted jacket number(s) will be entered onto the policy(ies) in the **Create Policy** screen in Impact/SQL.



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.

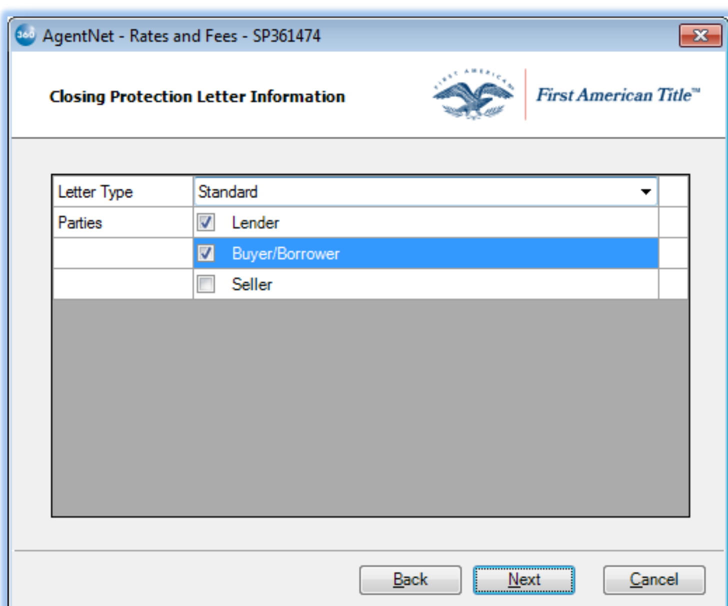


For **Pre-Pricing** requests in States where CPLs fees are applicable, the **Rates and Fees** screen will be presented. You will have the option to select whether to price **Policies**, **CPLs**, or **Both**.

IMPORTANT NOTICE:

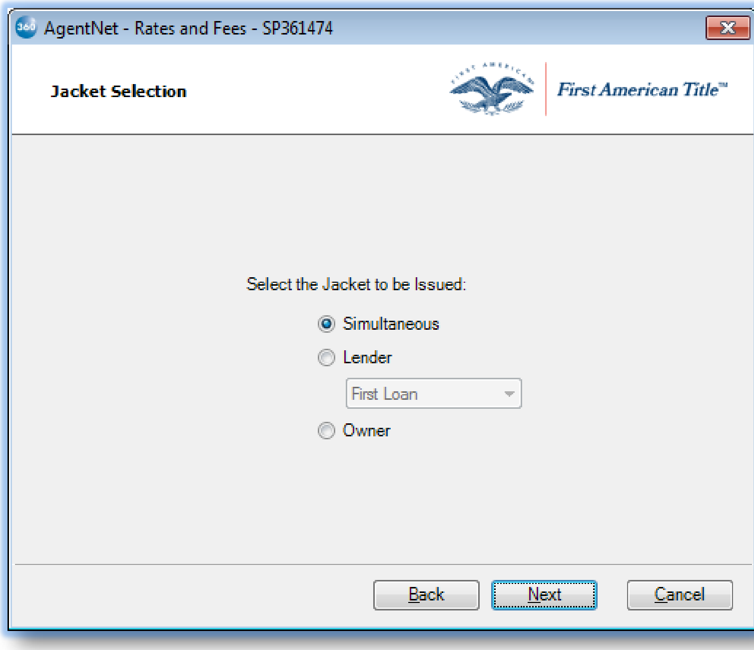
Endorsements can only be priced if added to the Impact/SQL file. Add any endorsements you wish to price to your Impact/SQL file prior to launching the **AgentNet** product.

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.

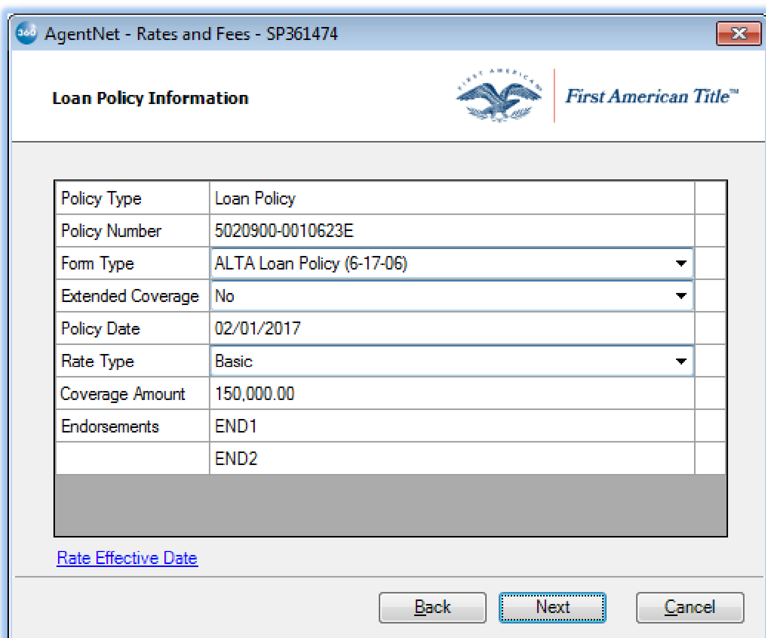


Select the appropriate choice, among **Lender**, **Buyer/Borrower**, **Seller**, and then click the **Next** button at the bottom of the **Closing Protection Letter Information** screen.

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.



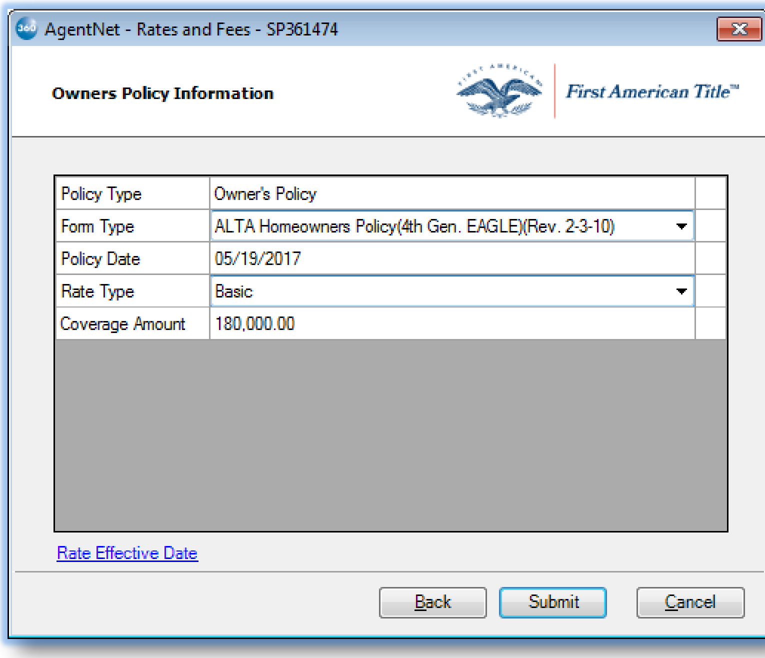
If you selected **Lender** Policy on the **Jacket Selection** screen you will be presented with the **Loan Policy Information** screen. The screen will be populated with information from your Impact/SQL file. If **Pre-Pricing** request, the approprate policy form to be priced from the **Form Type** drop-down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

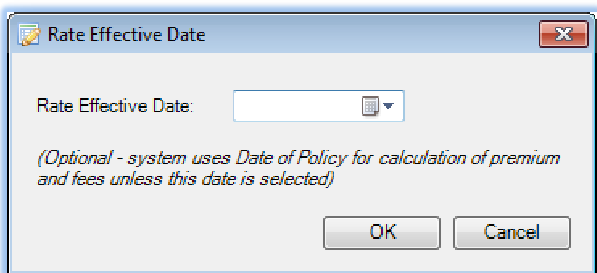


Then select the appropriate Rate Type from the **Rate Type** drop-down. If **Pre-Pricing** request, you may modify the information contained on the screen. Click **Next** to continue.

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.

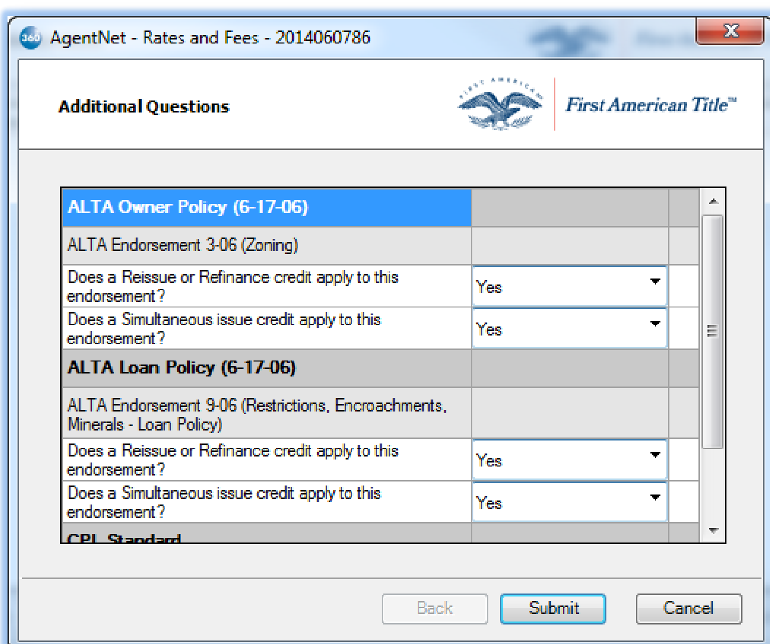
Then select the appropriate Rate Type from the **Rate Type** drop-down. If **Pre-Pricing** request, you may modify the information contained on the screen. Click **Submit** to continue.

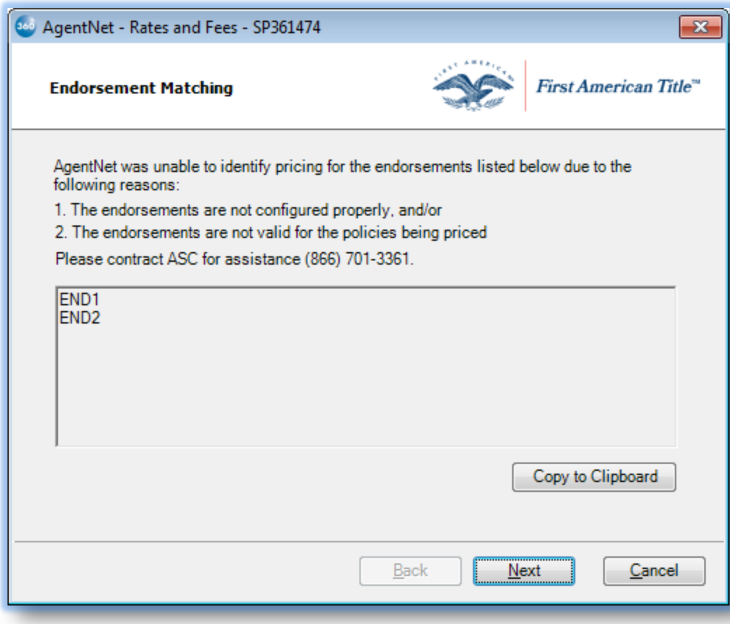




OPTIONAL: You may also select the blue link at the bottom lefthand corner of the screen to set the **Rate Effective Date**. If selected, you will be presented with the **Rate Effective Date** dialogue where you can enter the date for calculation of premium and fees. Click **OK** or **Cancel** to return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

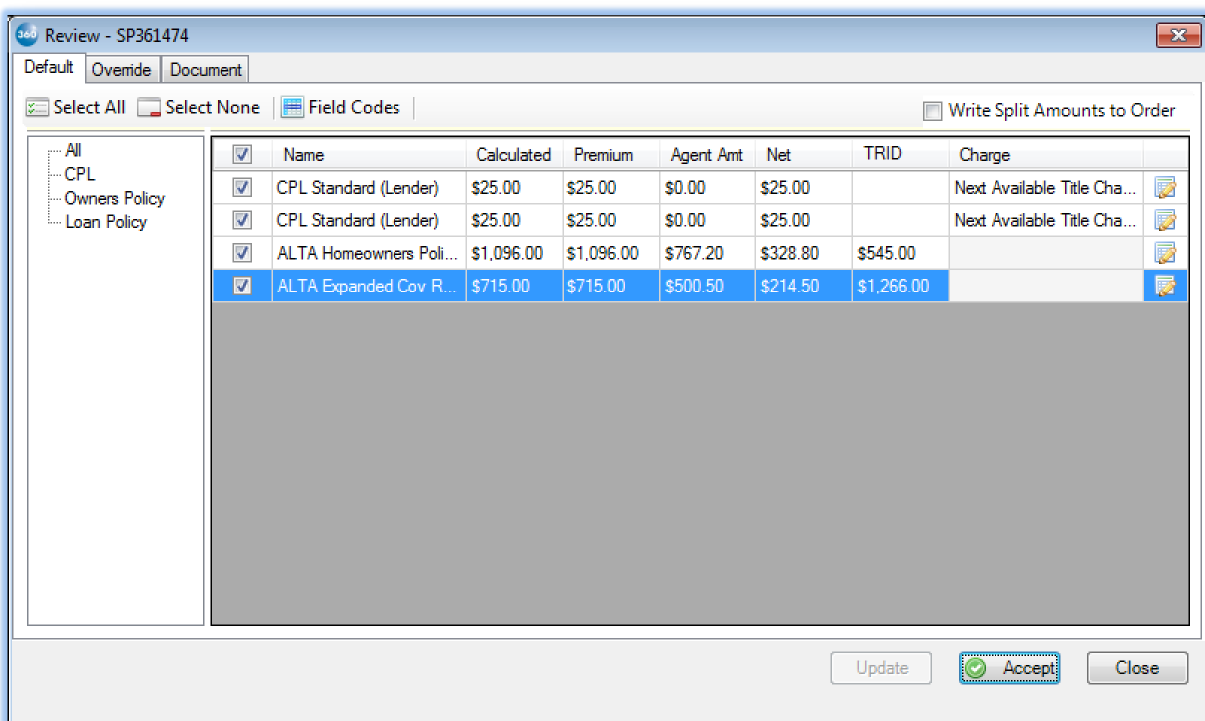




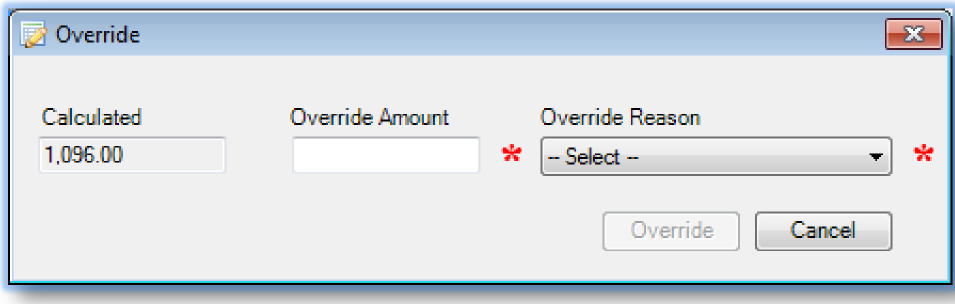
If the product cannot match the endorsements from your Impact/SQL file or if those endorsements are not available for the Policy Forms to which they were attached, you will be presented with the **Endorsement Matching** screen. The screen will have instructions on how to resolve the issue and note exactly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

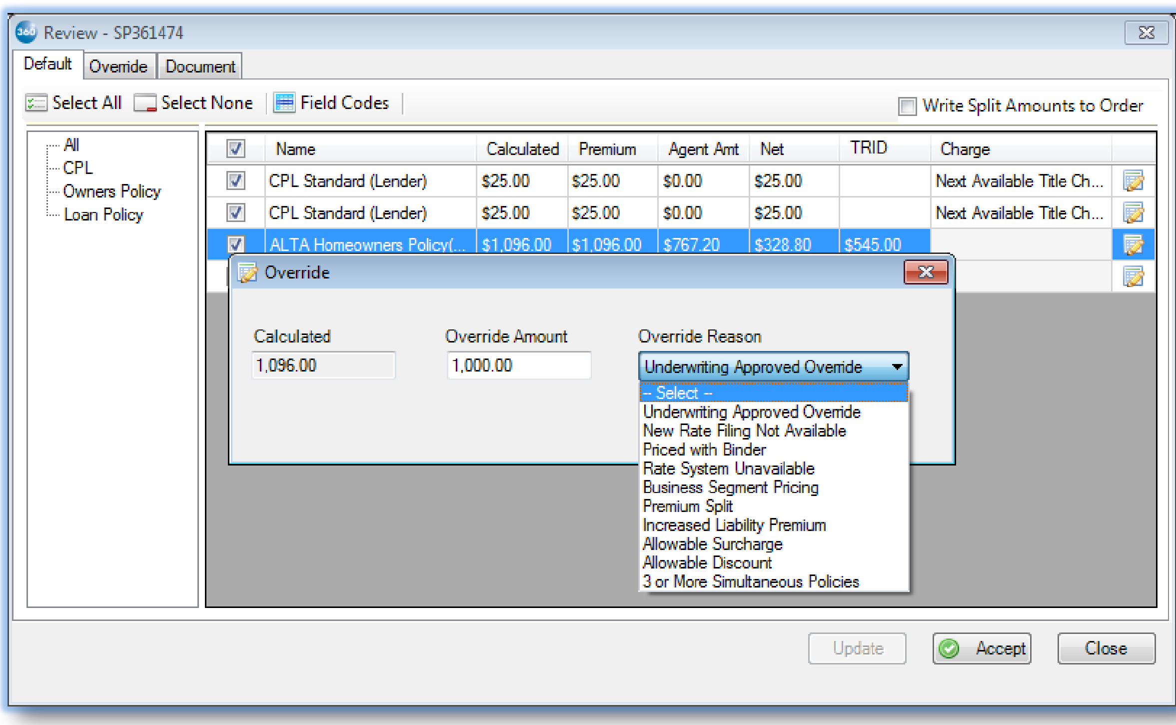
You can have the Split Amounts written to the Impact/SQL file by checking the **Write Split Amounts to Order** Check Box.



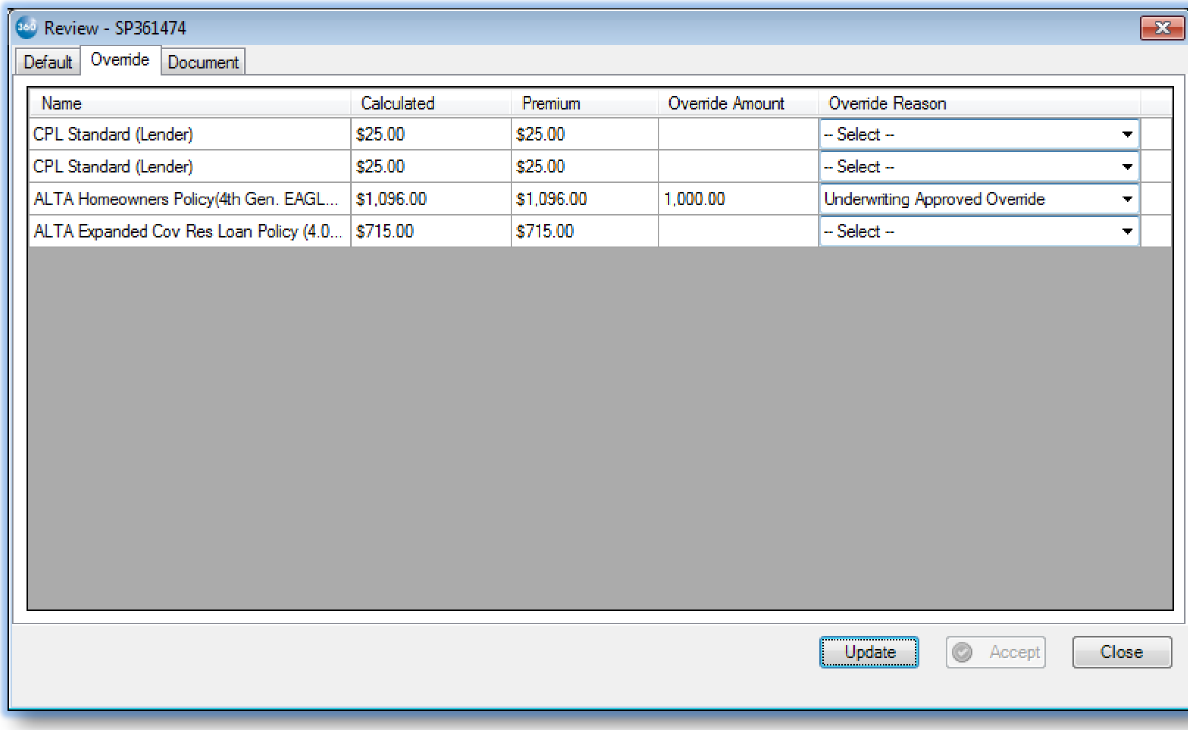
You may **Override** the Premiums and Fees returned by **AgentNet** in two ways. On the **Default** Tab, you can Click on the **Edit** Icon on the far right of each Premium and Fee returned. This will bring up the **Override** Dialogue.



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.

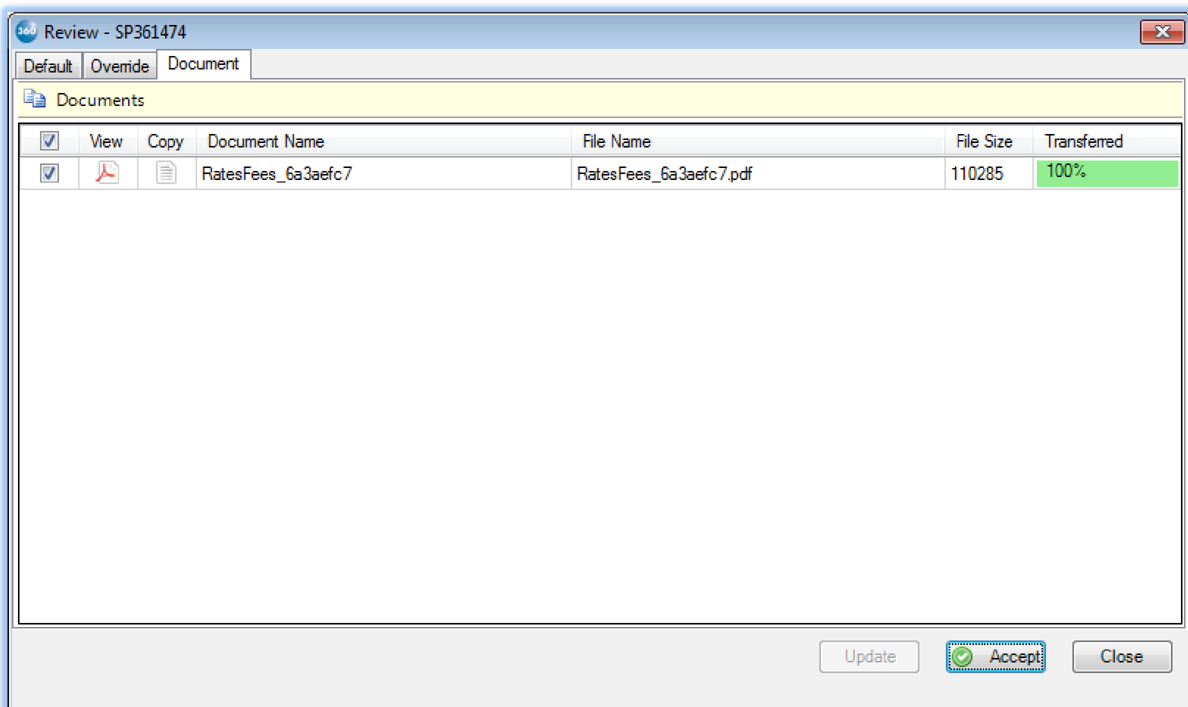


On the **Override** Tab, you can enter Override Amounts on each line and select the Override Reason and then Click **Update** to send the information to **AgentNet**.



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.

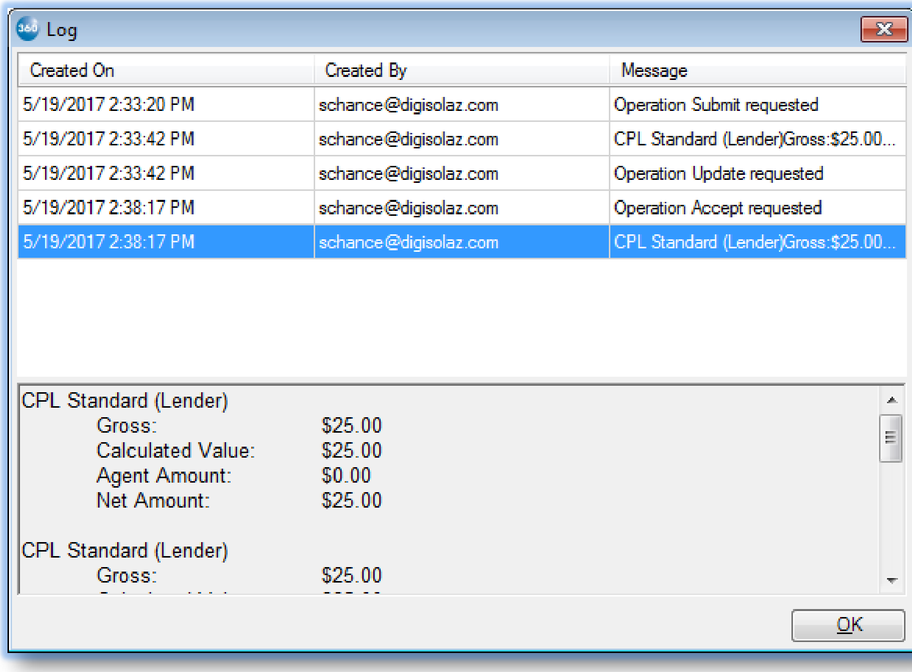
On the **Documents** Tab, you may view the Document returned from **AgentNet**. You may copy the PDF to your Clipboard by Selecting the **Copy** Icon. You may also view the PDF by Clicking on the **PDF** Icon.



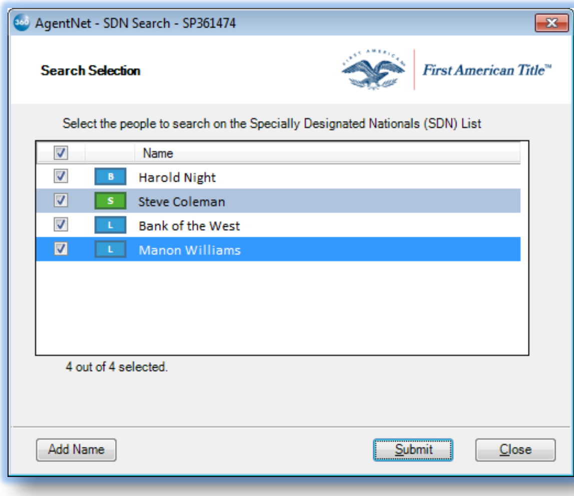
Click **Accept** to add the document, premium(s), fee(s) to your Impact/SQL file. The document(s) will be available in your **User Attachments** widget where they may be printed, emailed or published to a document retention system. Accepted jacket number(s) will be available within the Impact/SQL order.

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**.

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

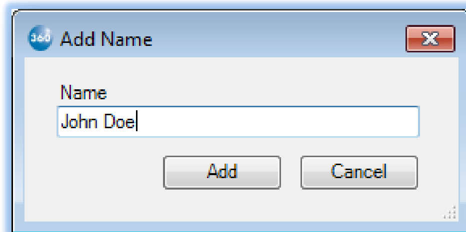


How to Submit a Request for an SDN (Specially Designated Nationals) Search



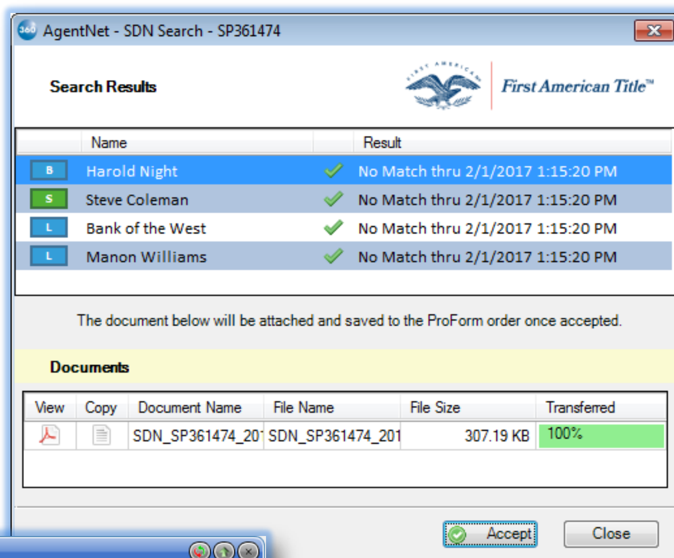
To order an **SDN Search**, click the **Add Product** icon at the bottom of the **Title Services** screen. On the **Available Products** screen select **SDN Search**. The **Search Selection** screen will allow you to choose from parties and contacts in your Impact/SQL file to search against the U.S.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

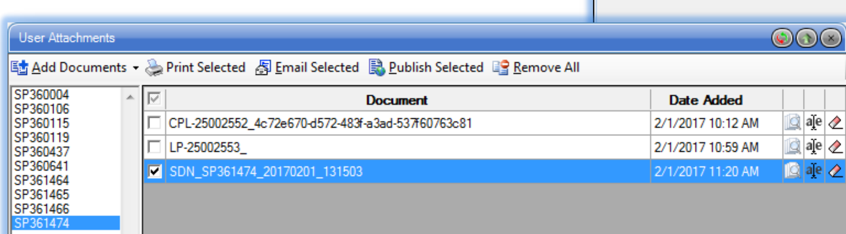
You can also manually add names to search by selecting the **Add Name** button on the bottom left corner of the screen. Enter the name and click on the **Add** button to add the party to the search listing.



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

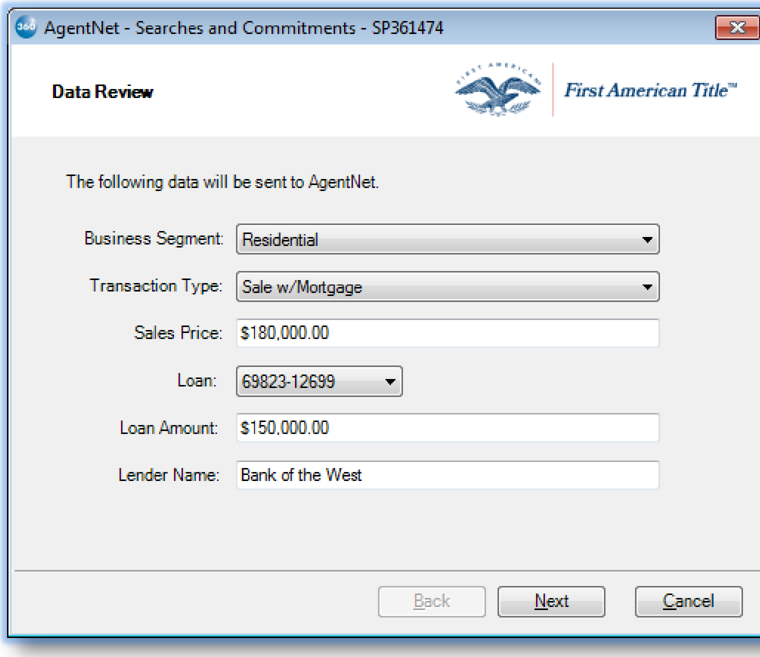
AgentNet will immediately return the results of the search. The **Search Results** screen allows you to view the results and the document that is returned. Click on the **Accept** button to add the document to your Impact/SQL file. The document will be available in your **User Attachments** widget where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



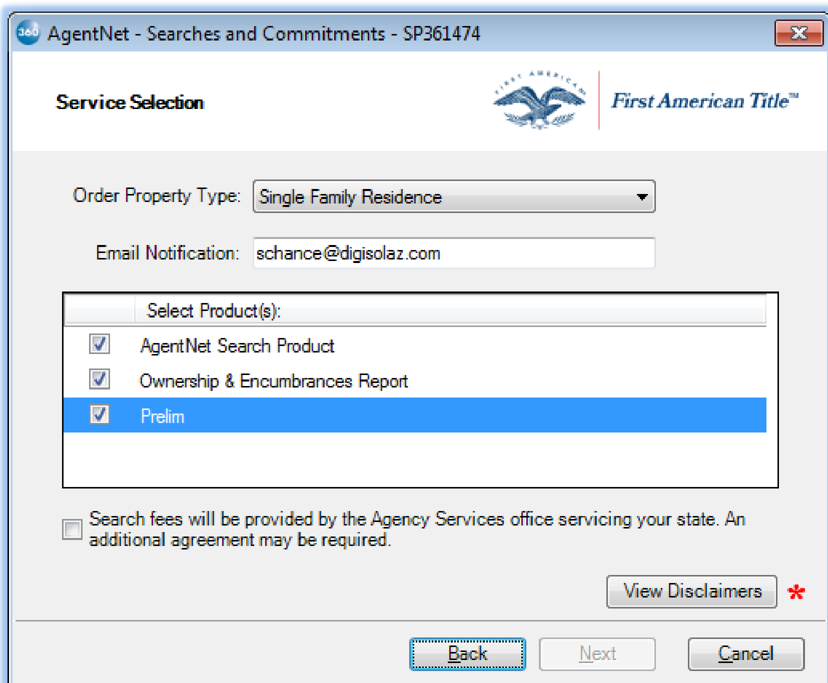


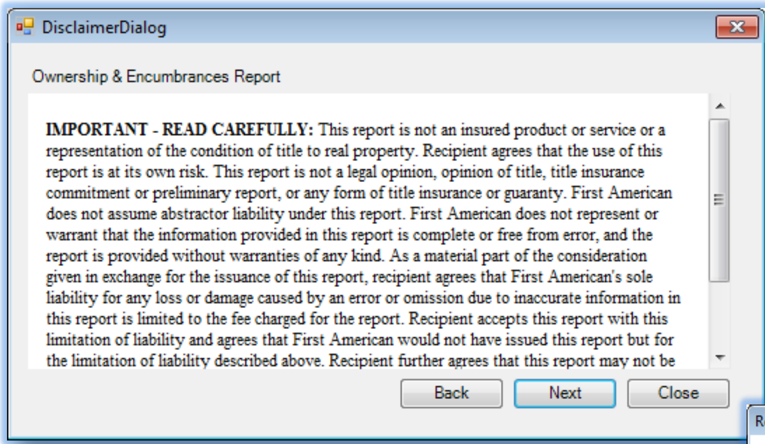
How to Request Searches and Commitments from AgentNet

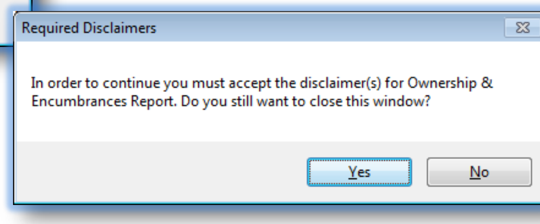
To order **Searches and Commitments**, click the **Add Product** icon at the bottom of the **Title Services** screen. On the **Available Products** screen select **SDN Search**. The **Data Review** screen will present with the fields pre-entered with data from your Impact/SQL file. Click **Next**.



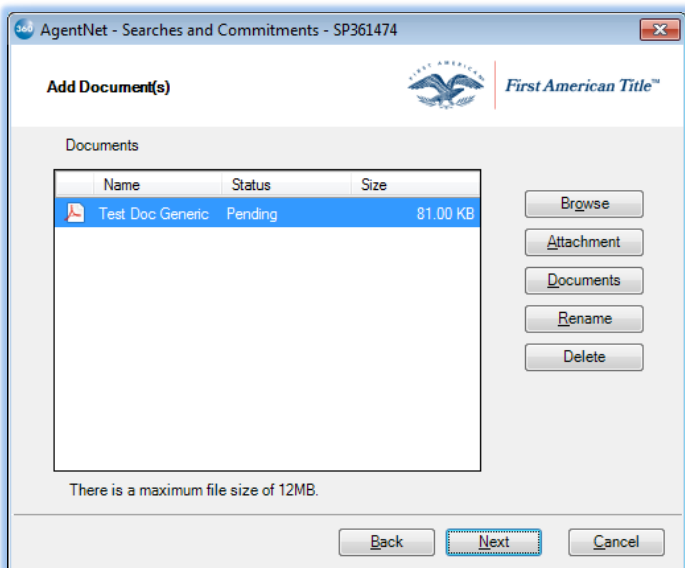
The **Service Selection** screen allows you to choose the products you want to order. The **Email Notification** field will need to be completed with a valid email address of the person to receive notifications from **AgentNet**. If you select **Ownership & Encumbrances Report**, you will need to click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



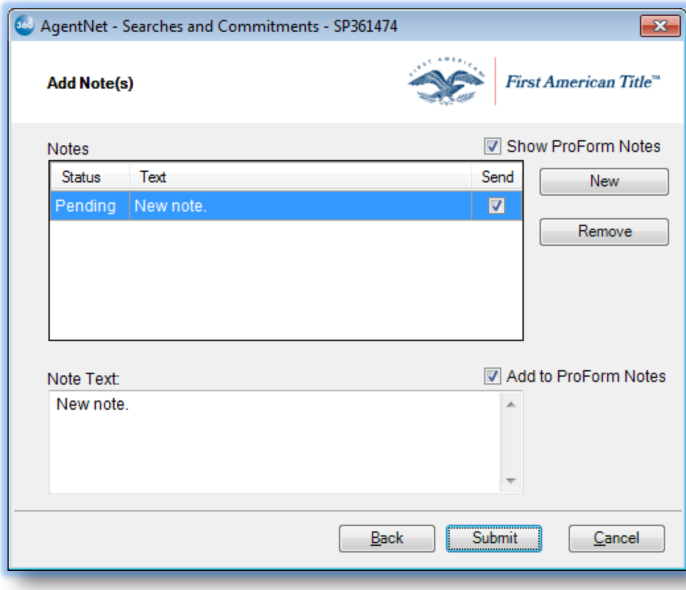




Click **Close** to return to the **Service Selection** screen. To proceed, acknowledge the statement "Search fees will be provided by the Agency Services office servicing your state. An additional agreement may be required" by checking the checkbox and then click **Next**.



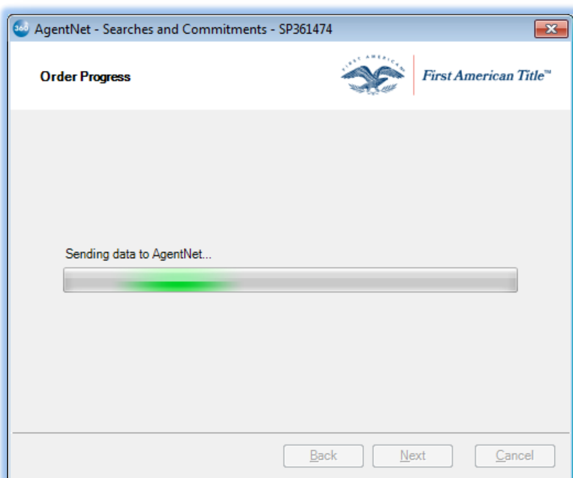
The **Add Document(s)** screen allows users to add documents to be submitted to **AgentNet**. Click the **Browse** button to browse out to a file/folder location. Click the **Attachment** button to select a document from the **User Attachments** widget. Click the **ReadyDoc** button to open an Impact/SQL 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 **Next** to continue.

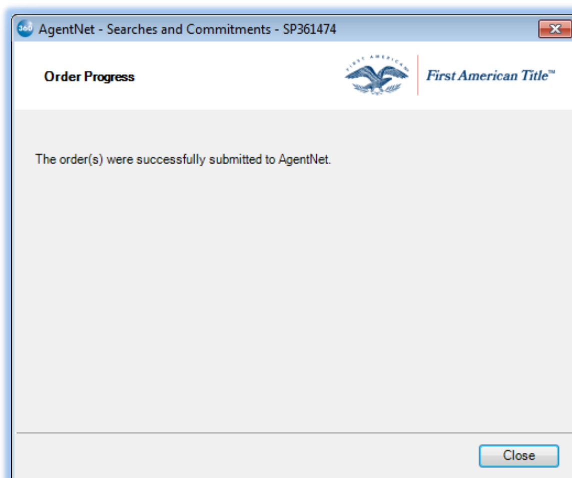


If desired, the user may add notes relating to the transaction by clicking the **New** button on the **Add Note(s)** screen. Enter the new note by clicking in the **Note Text** box and typing the note. The new note will be added to the **Notes** list.

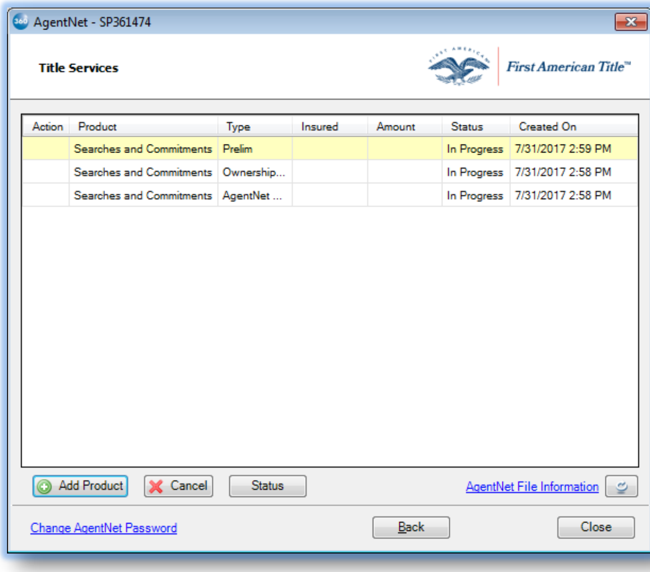
By default, the notes entered in the Impact/SQL file will also be displayed in the **Notes** list. The Impact/SQL notes may be hidden in the **Notes** list by unchecking the **Show ProForm Notes** checkbox. The user may select the notes to be sent to **AgentNet** by checking the box in the **Send** column. 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.

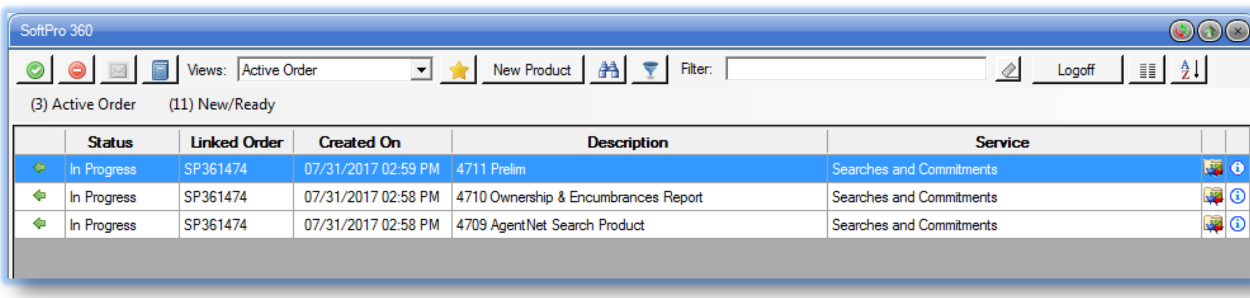
Click **Submit** to order the products from **AgentNet**.





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

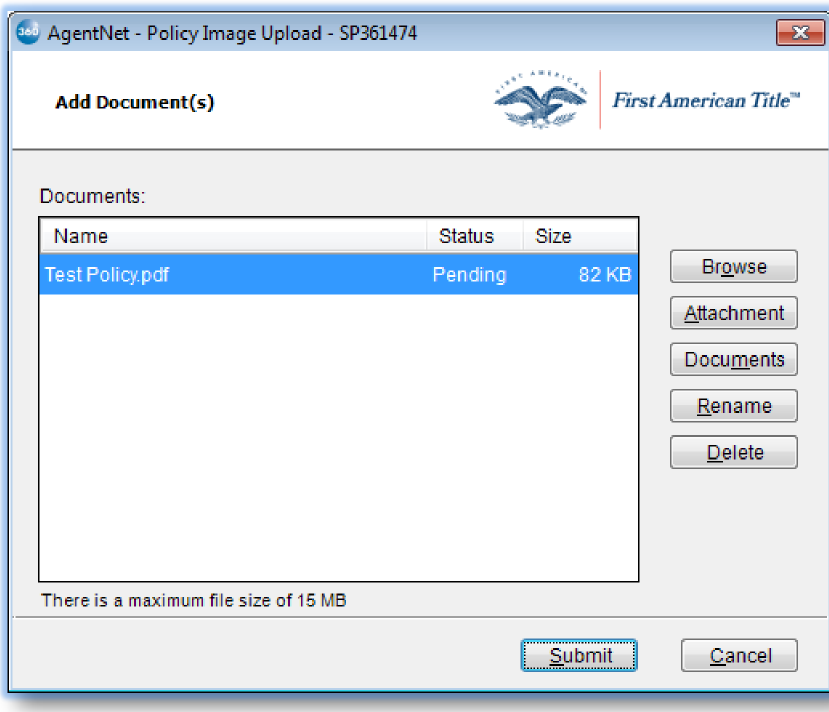




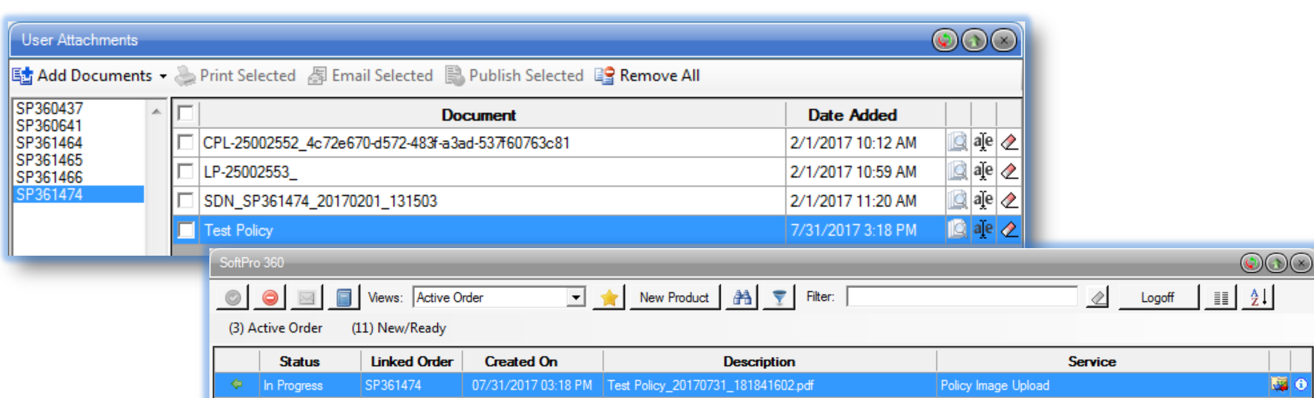
How to Upload a Policy Image to AgentNet

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).

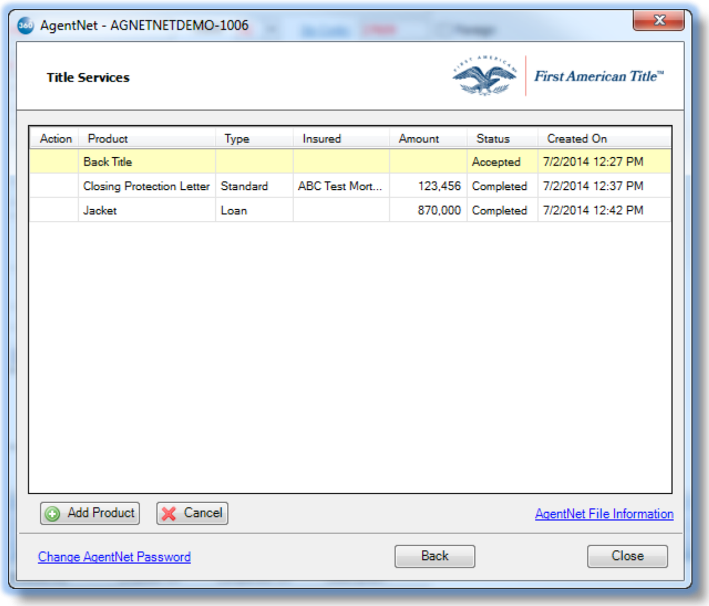


The uploaded policy will be saved in your **User Attachments** widget and for FNF sites, smartView as well. An entry will also be made in your SoftPro 360 widget.



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.



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

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