Managing agentTRAX Transactions within the Impact/SQL Widget SoftPro 360

How to Submit a Transaction to agentTRAX

The **agentTRAX** application allows Fidelity National Title Group (FNTG) agents to order Policy Jackets and Closing Protection Letters (CPL) via the Impact/SQL widget SoftPro 360.

Policy jackets should be requested <u>after</u> the commitment/prelim has been prepared and the policies to be issued have been identified.

Both the Policy Jackets and Closing Protection Letters will be returned into the **User Attachments** module, in Impact/SQL, assigned to the file they were ordered for.

The agentTRAX service can be found in the SoftPro360 **New Product** menu under the **Underwriter Services** heading. Double click **FNTG - agentTRAX**, or highlight it and click **OK** to place an order.
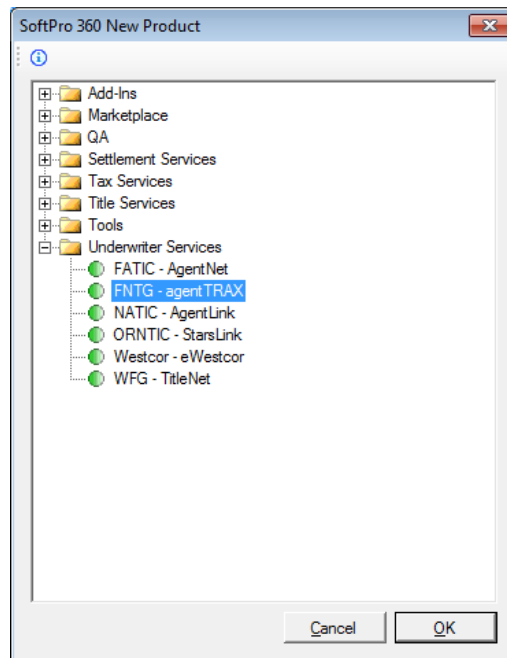
If an Impact/SQL file is open on the desktop, it will be listed in the **Order Linking** dialog that is presented to the user, as shown below. The active order will be highlighted and entered in the **Selected Order Number** field. If this is not the order that the user wishes to order a product for, the **Selected Order Number** field can be overwritten with an order that is not currently open. Click **OK** to continue.
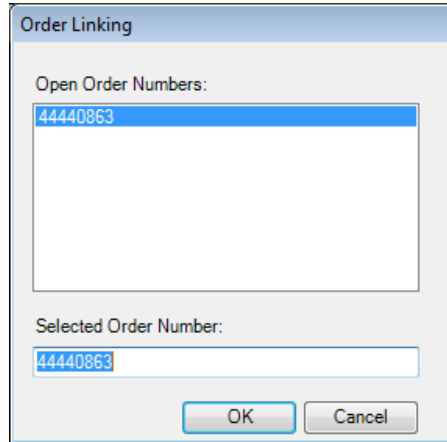
The **Login** screen requires an **agentTRAX User ID** and **Password**. In addition, the Property State must have been entered within the Impact/SQL file before attempting to log into agentTRAX. If a user checks the **Remember me** checkbox, the first time they log in, they will not need to enter their User ID and Password on future orders. Agents who have not registered will need to contact their agency representative. If credential assistance is needed we have provided a phone number and email address for the **agentTRAX Help Desk** on the **Login** screen. Click the **Next** button to continue.
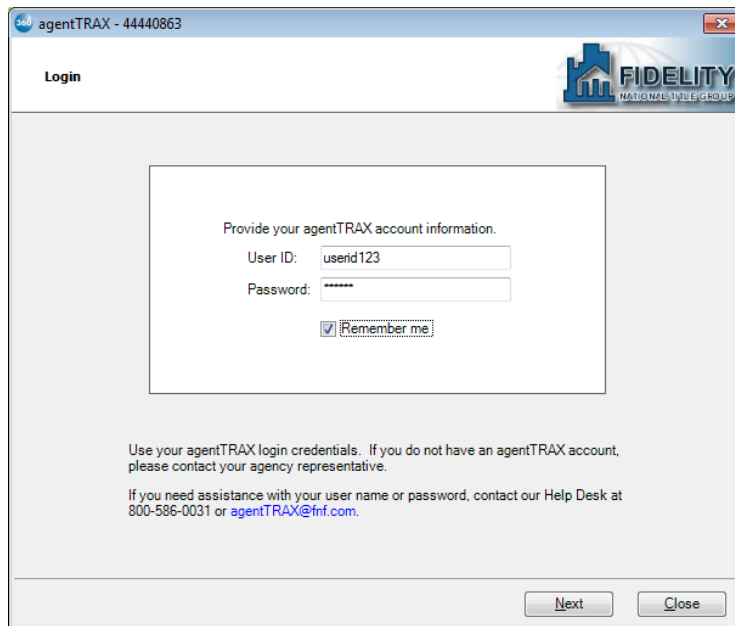
The **Company/Underwriter Selection** screen will be presented if the logged-in user's account is affilitated with more than one Company/Underwriter combination. It will show a list of all available companies/underwriters. Highlight the desired company/underwriter and click **Next** to continue.

If the logged-in user's account provides for the ordering of CPL's, the **Additional Agent Information** screen will show available options for names that should appear on the printed CPL. Select the **DBA** (Doing Business As), **Legal Name**, or **Both** option by clicking on the button next to each available selection. To continue, click **Next**.
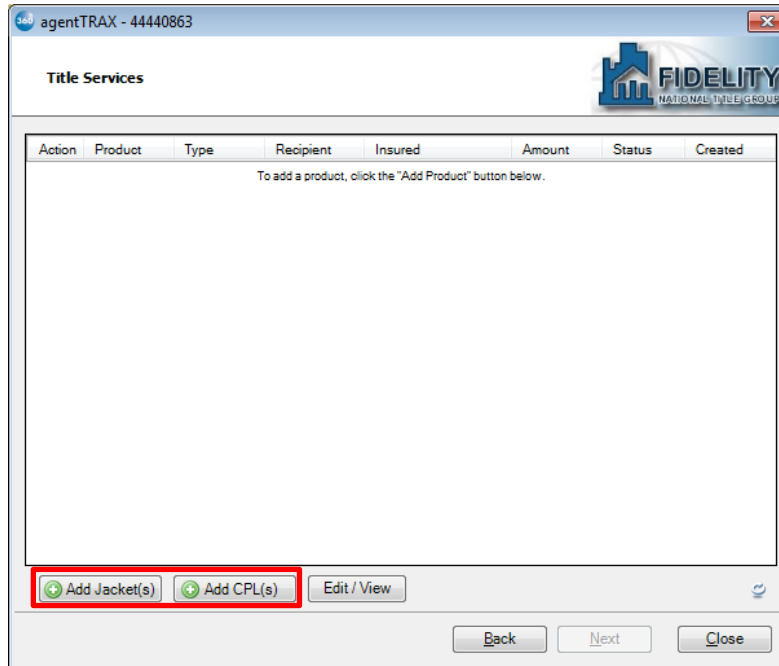
The **Title Services** screen shows the agentTRAX transactions that are associated with the linked Impact/SQL file, if any. In the screen shot below, there are no associated transactions. To order an agentTRAX Jacket, click the **Add Jacket(s)** button. To order an agentTRAX CPL, click the **Add CPL(s)** button.

For information on ordering a Jacket, please see pages 5 – 17 of this document.

For information on ordering a CPL, please see pages 18 – 25 of this document.

How to Submit a Request for Policy Jackets to agentTRAX

After clicking on the **Add Jacket(s)** button, on the **Title Services** screen, the **Property Information** screen is presented. The **Property Information** screen will pull file data on the property address and county. If the **County** entered on the file is not spelled correctly or is otherwise not recognized by agentTRAX then the County drop down can be used to select the appropriate County. The system will require a **Property Type** to be selected from the drop down list provided on that field. Once all required data has been provided, the user should click **Next** to continue.

The **Jacket Selection** screen is then presented and provides the option of selecting **Simultaneous**, **Lender**, **Owner** or **Other** as a type of **Jacket to be Issued**. If the Impact/SQL file has multiple loans, the **Lender** "**First Loan**" drop down will be enabled allowing a selection of the **First**, **Second** or **Third** loan.

Note: When **Simultaneous** is selected, the next screen will be for the selection of the Owner's Policy followed by screens to select the Loan Policy.

If **Lender** is selected, the next screen will be the selection of the Loan Policy.

If **Owner** is selected, the next screen will be the selection of the Owner's Policy.

If **Other** is selected, the next screen will be the selection of the Other Policy.

Once the desired selection has been made, click **Next** to continue.

In certain jurisdictions a **Jacket Rate Selection** screen will provide a list of available rate codes for a policy.   Highlight the desired rate code then click **Next** to continue.
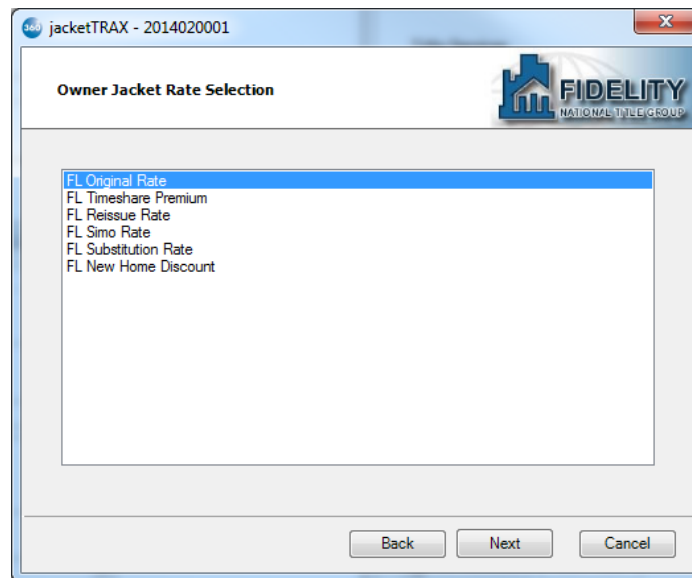

Other jurisdictions will be directed to the **Jacket Type Selection** screen which can be found on Page 7 of this guide.

The **Jacket Form Selection** screen will appear once the **Jacket Rate** has been selected on the **Jacket Rate Selection** screen (above) Highlight the desired **Jacket Form** and click **Next** to continue. After clicking continue, the next screen will be the **Jacket Information** screen which can be found on page 7 of this guide.
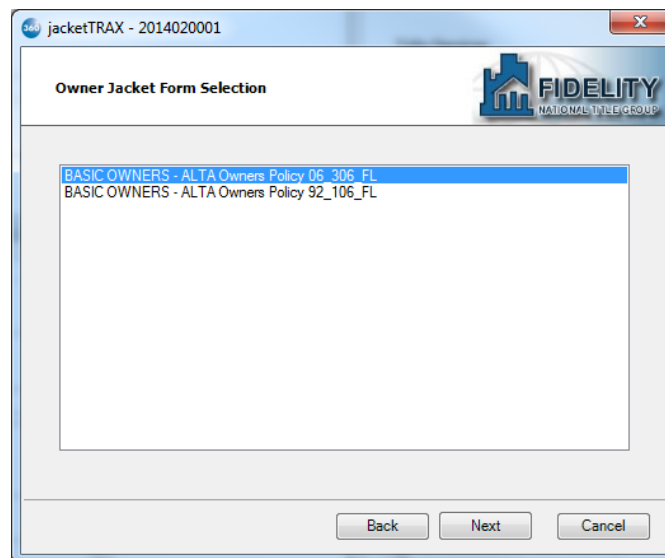
The **Owner** (or **Lender**) **Jacket Type Selection** screen provides a list of all available Jacket types that can be selected. The list displayed is based upon credentials, Company/Underwriter and property state. Highlight the desired Policy then click **Next** to continue.
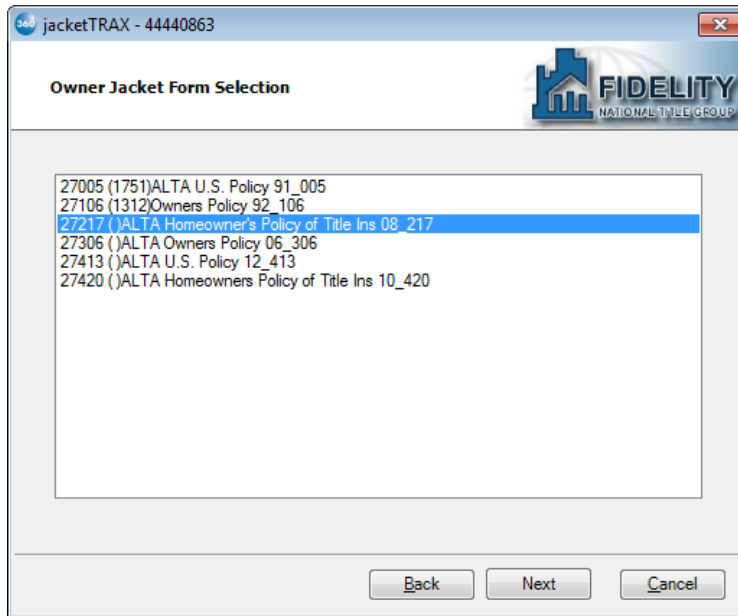

Based upon the type of jacket selected, the **Owner** (or **Lender**) **Jacket Information** screen will display applicable fields needed to create the jacket. If entered into the Impact/SQL file, the data will seemlessly flow to the appropriate fields. All fields allow the user to manually enter text. The data available to be worked will vary by policy selected. Click **Next** to continue once all fields have been addressed.
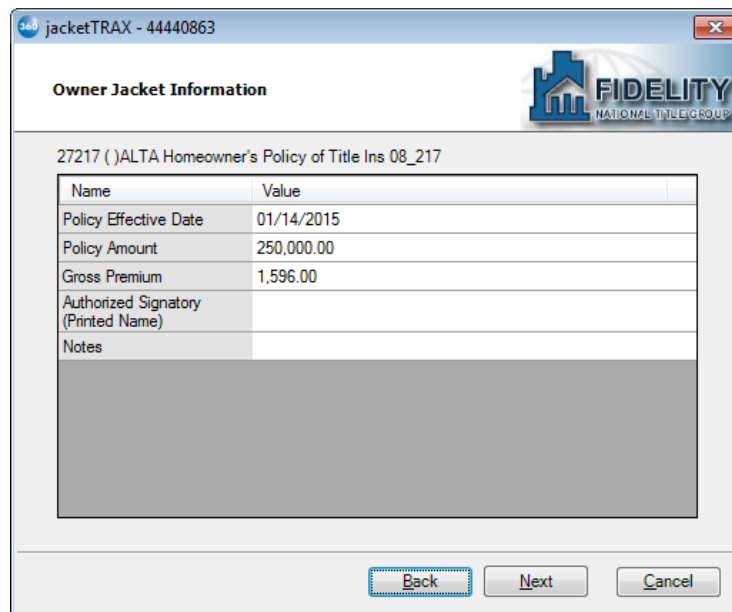
Remember, if **Simultaneous** was the **Jacket Selection**, then a pair of Lender screens like those above will follow the Owner versions.

The **Endorsements Included with Policy** screen displays a list of all endorsements available. Check the required endorsements and enter a **Gross Premium**. To only see endorsements selected, click the 'Display All' drop down and click 'Display Selected'. The bottom of the screen is blank in an Impact/SQL environment; you must select the endorsements on the top half of the screen or this information will not be sent to agentTRAX.   Click **Next** to continue.
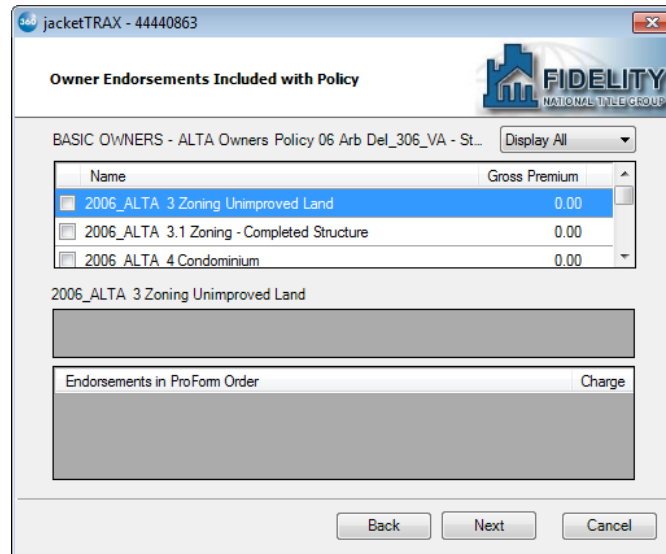
The **Other Fees** screen will display any additional fees that may need to be included with the Jacket, in selected jurisdictions. The gross premium should be entered into the **Gross Premium** column. Click **Next** to continue.
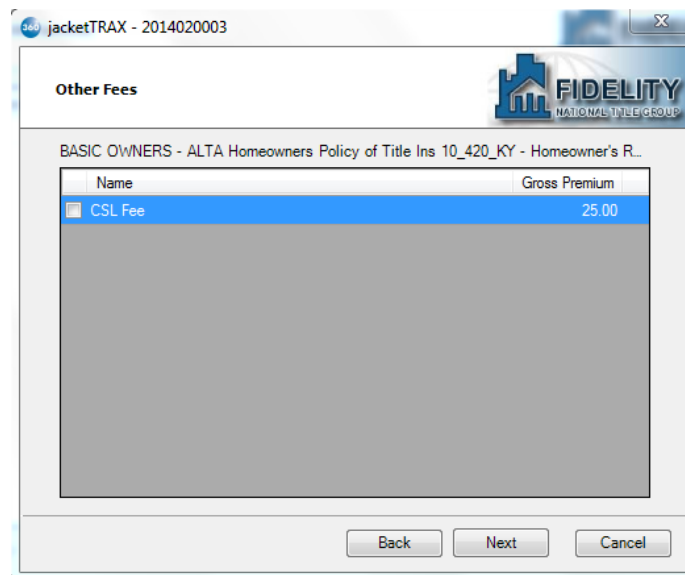
The **Optional Information** screen is available to enter a **Check Amount** and **Check Number**. If that data is available, enter it, then click the **Submit** button to order the Policy Jacket(s). An **Order Progress** screen will be displayed next in all cases except when additional tax data is needed in Kentucky. Please proceed to page 10 of this document for the **Order Progress** screen when additional tax data for Kentucky is not needed.

The **KY Tax Information** screen will only be displayed if agentTRAX is unable to calculate the premium taxes on the policies/endorsements issued in the state of Kentucky. The KY tax information screen will attempt to populate the **County Tax** and **City Tax** fields. If no values are available, use the manucipalities dropdown for County and City.   Enter the city and county taxes. Click **Next** to continue.

An **Order Progress** screen will be displayed while the data is being sent to agentTRAX.
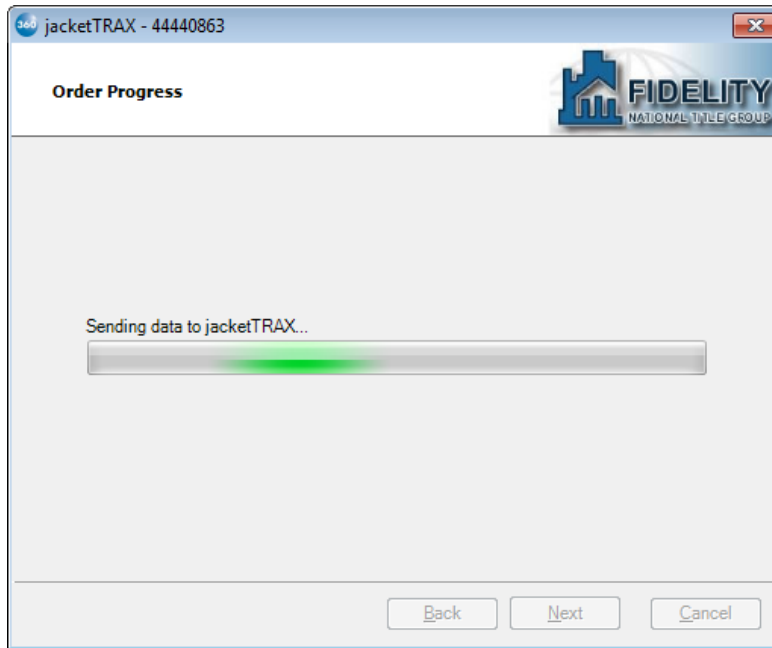
agentTRAX will immediately return the jacket(s) and present the **Review** screen. The **Review** screen displays the document(s) and jacket number(s) returned. Click the **Accept** button, at the bottom of the screen, to add the document(s) and jacket number(s) back into the Impact/SQL file. The jackets will be loaded into **User Attachments** for the file, and the jacket/policy number(s) will be added to the **Create Policy** screen, as shown on the next page.
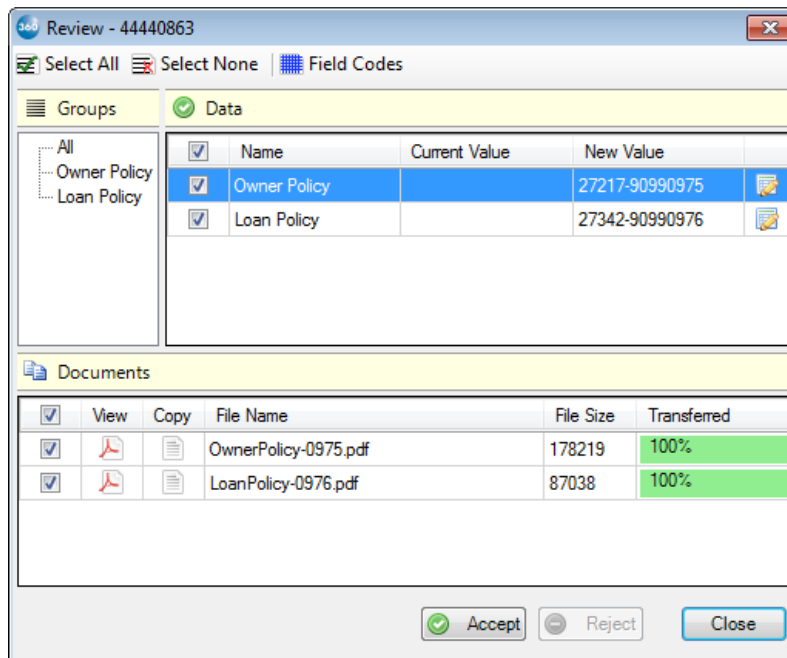
After clicking Accept, the user will be returned to the **Title Services** screen, where the newly worked product will display, once the screen refreshes, as shown on the next page.

Once the transaction has been **Accepted** the status of the transaction will update to **Completed**. Multiple jackets can be requested for the Impact/SQL file.
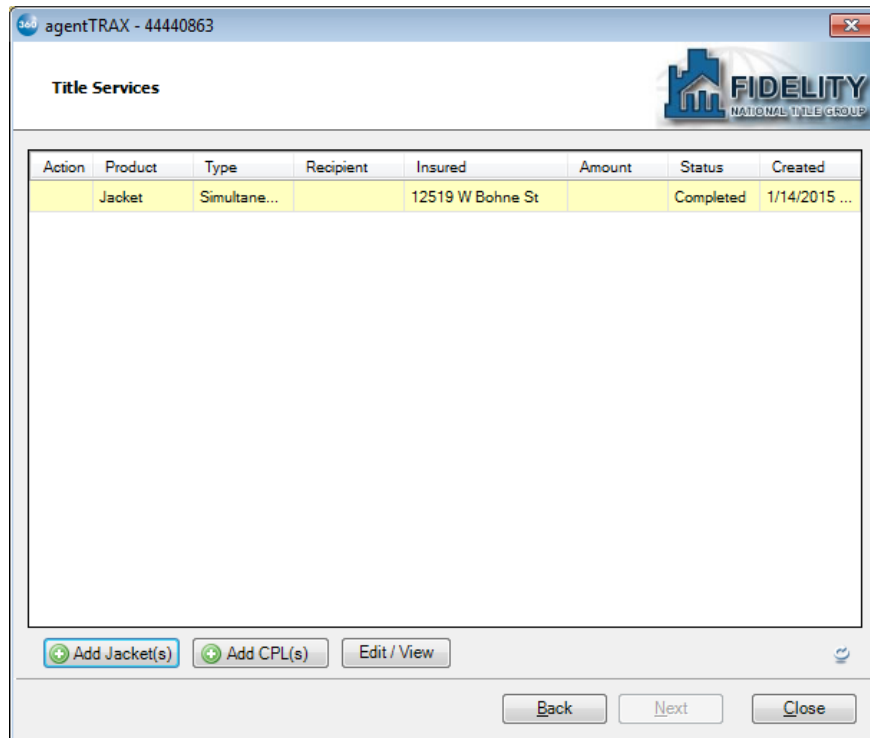
The jackets can be seen in the **User Attachments** widget, by selecting the file number from the tree on the left side of the widget.
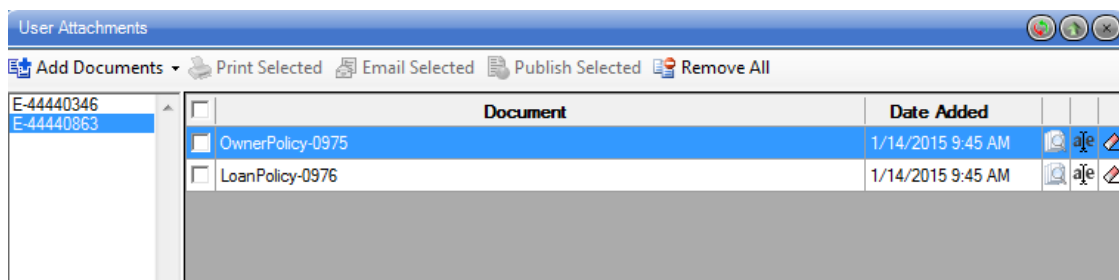
The **Policy Number**(s) from the returned jackets will now appear in the **Create Policy** screen.
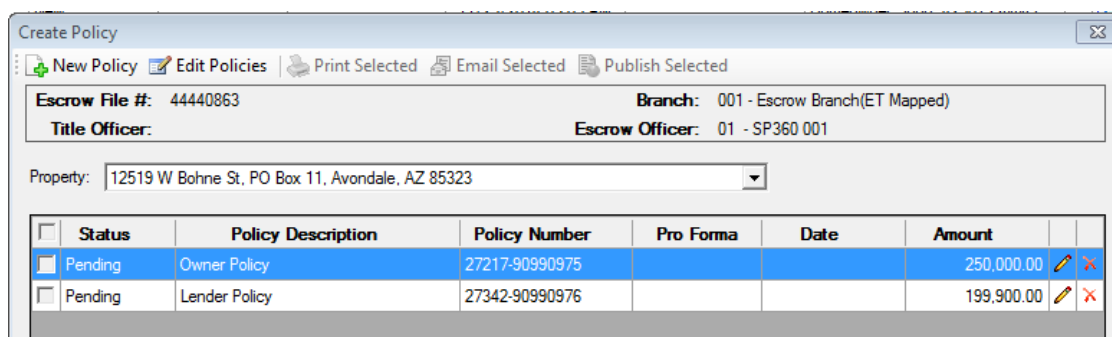
The **Logs** icon, in the Impact/SQL SoftPro 360 widget, displays a history of all actions for the highlighted transaction.

How to Edit, Void, and Reinstate a Policy in agentTRAX

A policy can be edited or voided within 30 days of the original submission date. To access a policy, follow the login steps found on pages 1 – 3 of this document. After logging in and selecting the company/underwriter, the **Title Services** screen will appear. All jackets and CPLs created for the Impact/SQL file will be displayed. To edit, void or reinstate a policy, highlight the desired policy and click **Edit/View**.
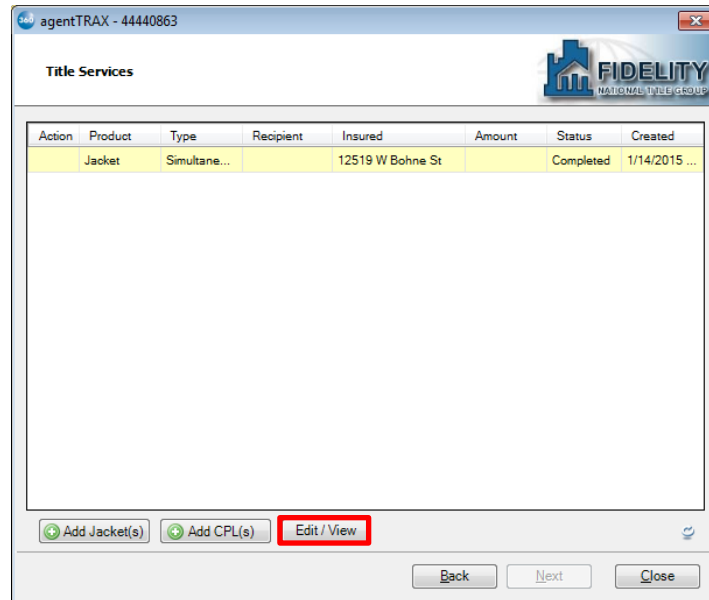
How to Edit a Policy in agentTRAX

The **Policy Information** screen will be displayed. To edit a policy, click **Edit**. A confirmation prompt will be presented asking **Do you wish to edit the policy?** Click **OK** to continue.
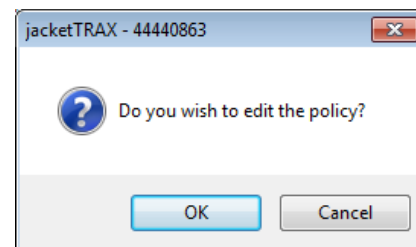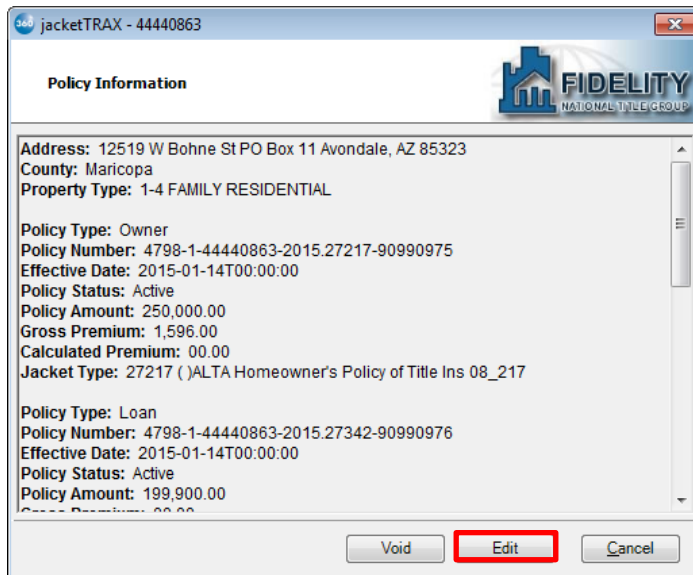
The following fields can be edited in a policy:

- Property Type
- County
- Policy Effective Date
- Policy Premium
- Gross Amount
- Authorized Signatory
- Notes
- Endorsement Gross Premium
- Endorsement Add/Delete
- Other Fee Premium
- Other Fee Add/Delete
- Additional Information
- Check Amount
- Check Number

Make corrections to the above fields and click next through each of the screens. To resubmit the policy, click **Submit** on the **Optional Information** screen.
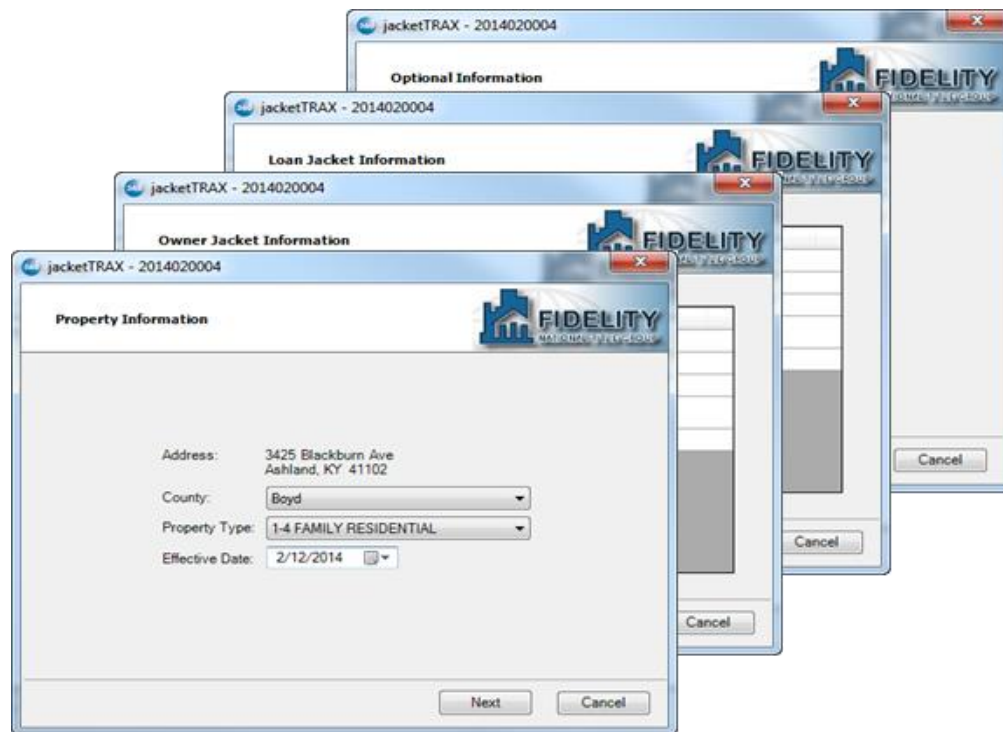

If other fields on the policy need to be changed, **Void** the policy and issue another policy in its place.

How to Void a Policy in agentTRAX

The **Policy Information** screen will be displayed. To void a policy, click **Void**. A confirmation prompt will be presented asking **Are you sure you wish to void the policy?** Click **OK** to continue.
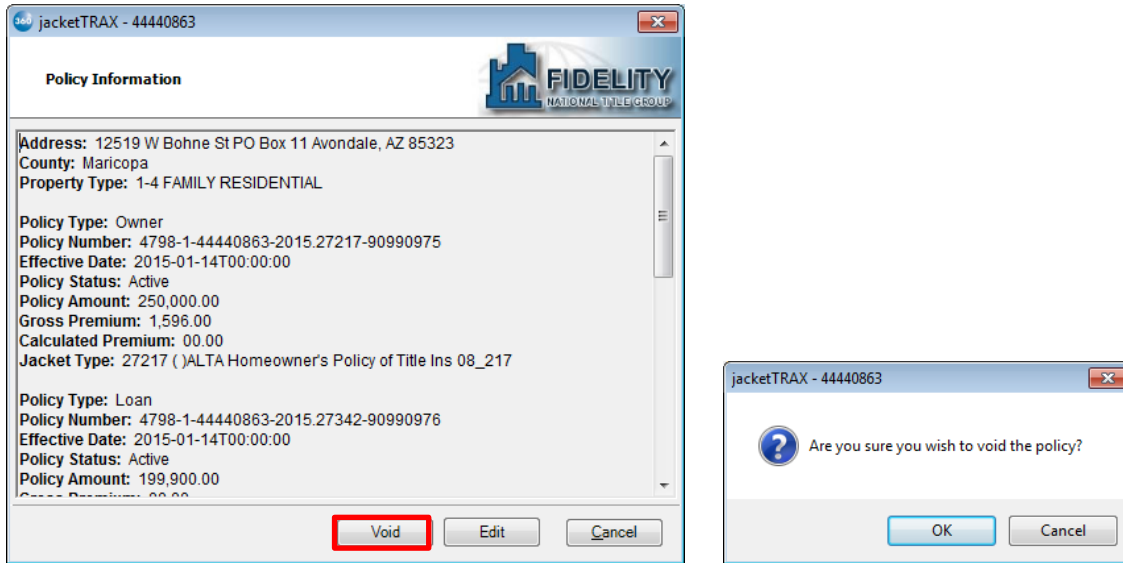
The Void Policy screen will be presented, on which the user should enter the reason for voiding the policy, then click on **Void** to continue – or **Cancel** if the policy is not to be voided.
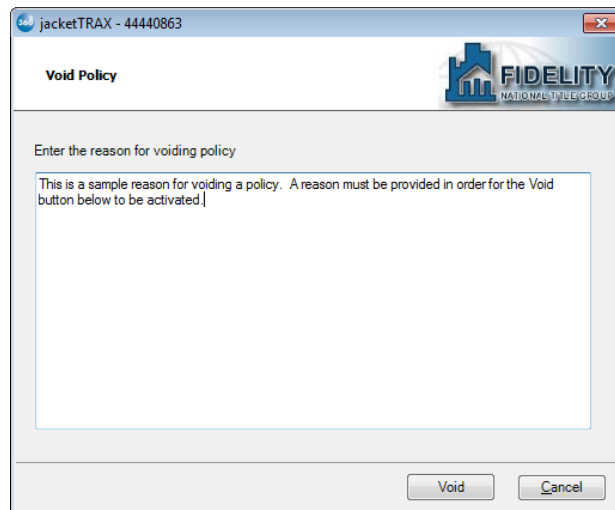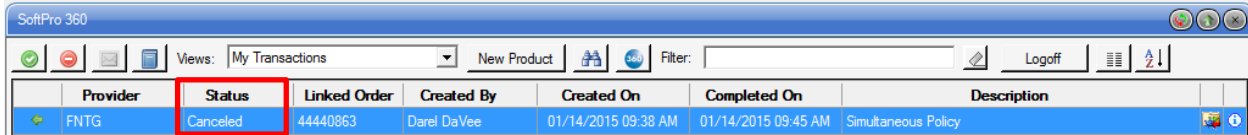

The **Order Progress** screen will appear while the void request is processed. The user will be returned to the **Title Services** screen upon completion and the **Status** on the order will change to **Canceled**.
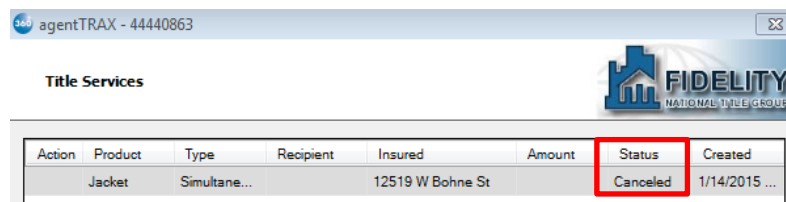
How to Reinstate a Policy in agentTRAX

When a transaction has been voided, the status will show **Canceled** on the SoftPro 360 Widget screen, as shown here.


If the user is logged out of agentTRAX, and wishes to reinstate a canceled policy, they can double-click on the entry on the SP 360 Widget screen and will be prompted to log back into agentTRAX, and will then be presented with the Title Services screen for the particular file.
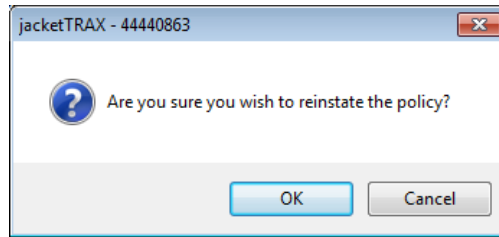
If the policy needs to be reinstated, click **Edit/View**.
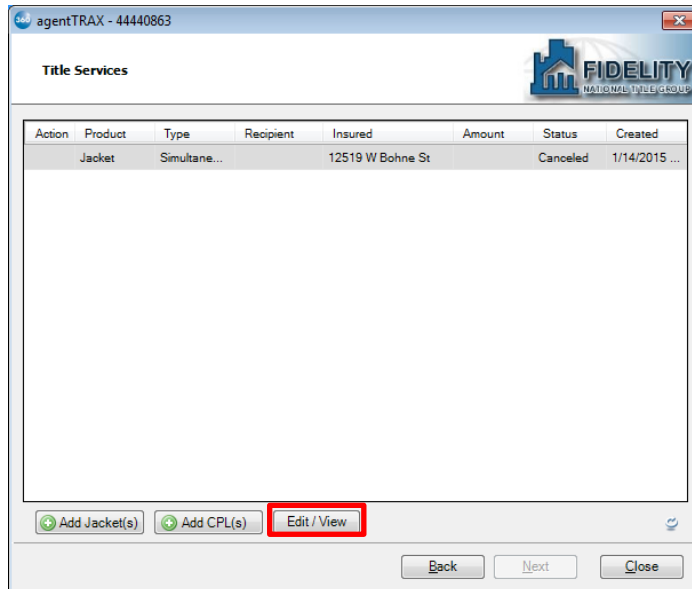
Upon selecting **Edit/View**, the **Policy Information** screen will appear. To reinstate the policy, click **Reinstate**.
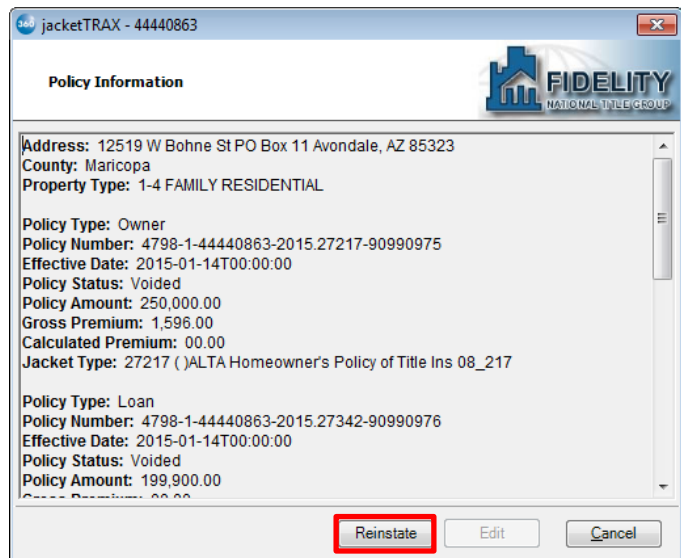
The **Reinstate Confirmation** screen will appear when the **Reinstate** button is clicked.

To confirm reinstating the policy, click **OK**. Enter in the reason for reinstating the policy and click on the **Reinstate** button, which will activate once a reason is entered.
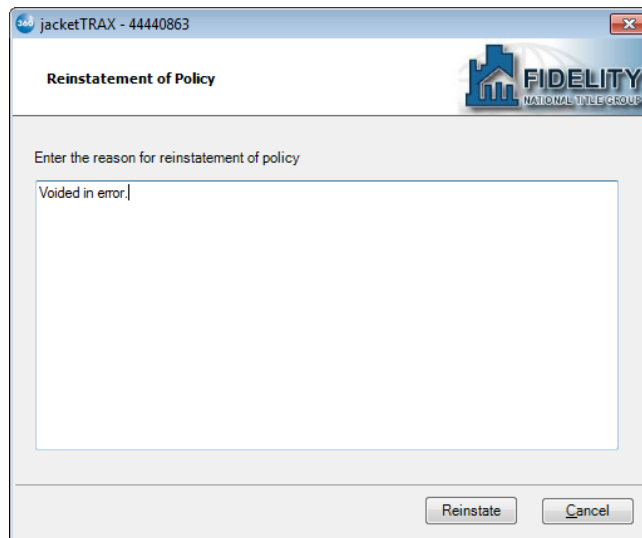
The user will be returned to the **Title Services** screen, and the **Status** on the order will, after a refresh, be reverted to **Completed**.
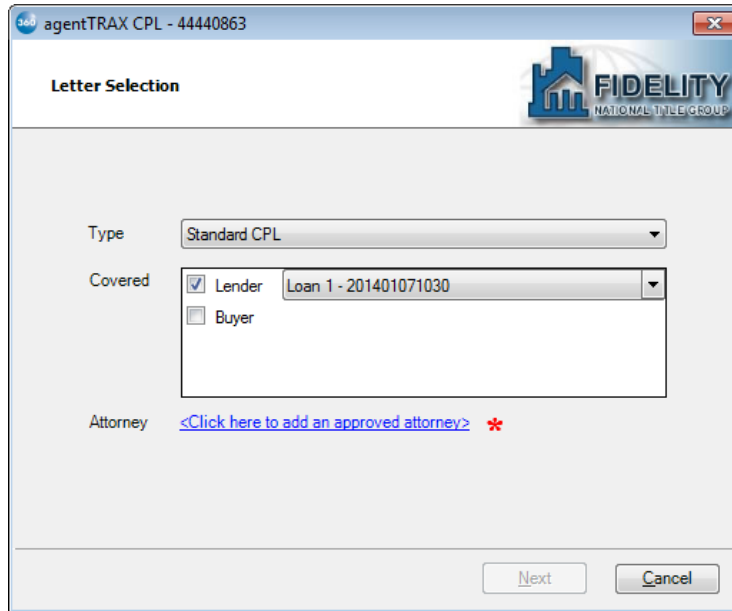
At this point, if no further agentTRAX work is to be done, on the selected Impact/SQL file, the **Close** button on the **Title Services** screen should be clicked to return to the Impact/SQL desktop.

How to Submit a Request for Closing Protection Letters to agentTRAX

Please refer back to the first four pages of this documentation to refresh your understanding on how to start the request for a CPL. The following discussion assumes that the initial request for a CPL has been made.

The **Letter Selection** screen will require a letter **Type** to be selected from the drop down. By default, the letter type is defaulted to **Standard CPL**. The state of the agent's ID determines what type of letter is available to the user. The letter Type will also determine which covered parties are available. Available covered parties are Lender, Buyer, and Seller. Lender is always checked by default.

If the Impact/SQL file has multiple loans, the Lender "**Loan**" drop down will be enabled allowing a selection of the First, Second or Third loan.

Note: The Attorney field may show <not supported> based on the users profile settings. If you need access to an "approved attorney" please contact your sales representative or the agentTRAX helpdesk for assistance.

Click **Next** to continue if an "approved attorney" is not mandatory.

In the screen shot above, the red asterisk (*) indicates an approved attorney must be selected, and the user should click on the link provided, and the screen shown on the next page will be presented.

The **Approved Attorney** screen will appear when the attorney link is clicked in the **Letter Selection** screen. To find an attorney, use the scroll bar on the right or begin typing the attorney's name or part of a name into the filter field. Once selected, the address of the attorney will be displayed in the details section at the bottom of the Approved Attorney screen. If the selected attorney has a DBA, the DBA checkbox will be available to be checked. Once complete, click **OK** to be returned to the **Letter Selection** screen.

The attorney selected in the **Approved Attorney** screen will now be displayed on the **Letter Selection** screen. If the attorney needs to be changed, click on the attorney's name to re-access the **Approved Attorney** screen.

Click **Next** to continue.

The **CPL Information** screen will be displayed. The fields to be verified/filled in on the **CPL Information** screen will depend on the covered parties selected in the **Letter Selection** screen. If Lender, Buyer, and Seller are selected, fields for all three letters will be displayed on the same screen. The information for the fields will be populated with data from the Impact/SQL file.

All fields are editable; however changes made here will not be saved back to the Impact/SQL file. Once all fields have been reviewed/updated, click **Submit** to continue.


An **Order Progress** screen will be displayed while the data is being sent to agentTRAX.

agentTRAX will immediately return the CPL(s). The **Review Closing Protection Letter(s)** screen displays the document(s). Click **Accept** to add the document(s) to the **User Attachements** widget of the Impact/SQL file.
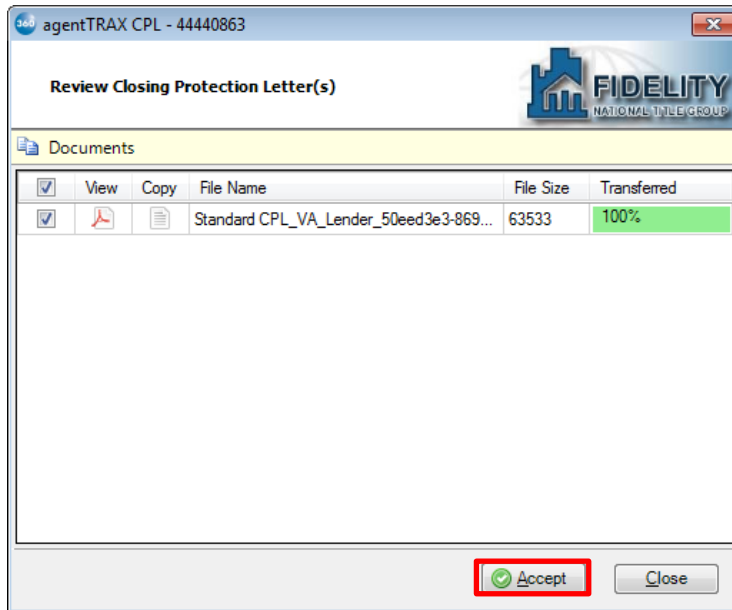
The **Title Services** screen will then be presented and, after a refresh, will reflect the **Status** of the CPL order as **Completed**.
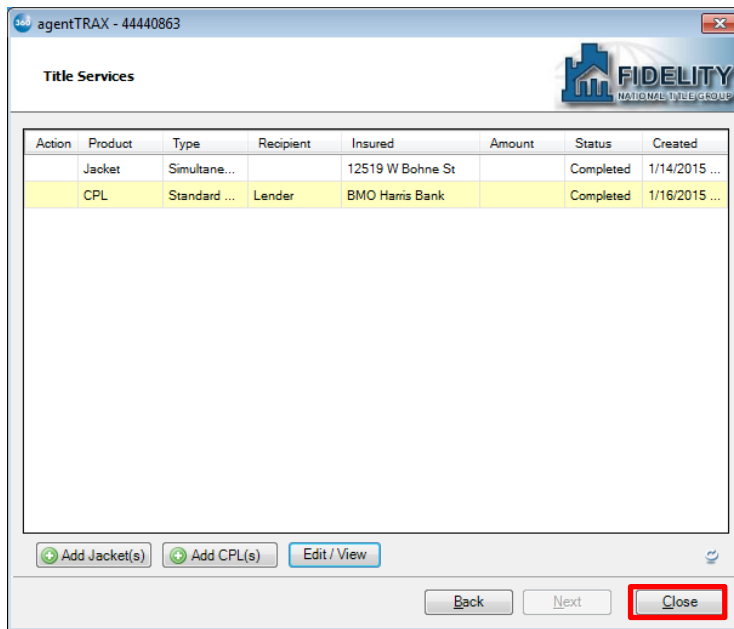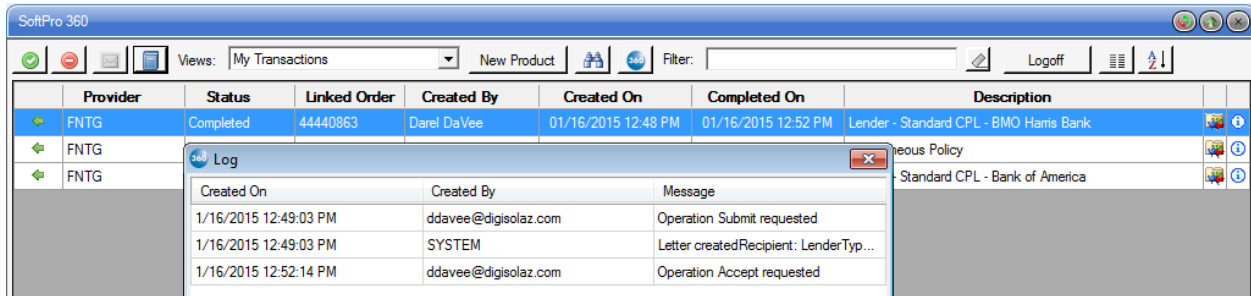

After the **Close** button is clicked, and the file is selected in the **User Attachments** wizard, the user will see the CPL listed there, where it can be printed, emailed, or published.
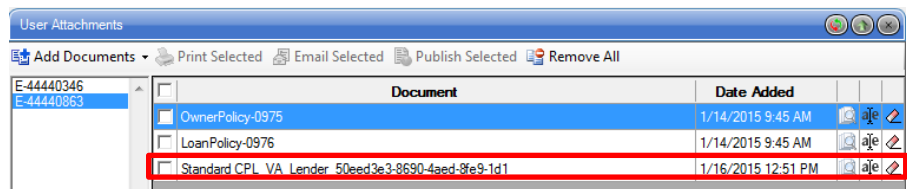
Once the transaction has been **Accepted** the status of the transaction will update to **Completed** on the SoftPro 360 Widget screen. Multiple CPLs can be requested for the Impact/SQL file.

If the transaction reflects a **Ready** status the ✅ **Next Step** icon is available or double clicking the transaction will take the user back to the **Review Closing Protection Letter(s)** shown earlier. The **Logs** 📘 icon displays a history of all actions for the highlighted transaction.
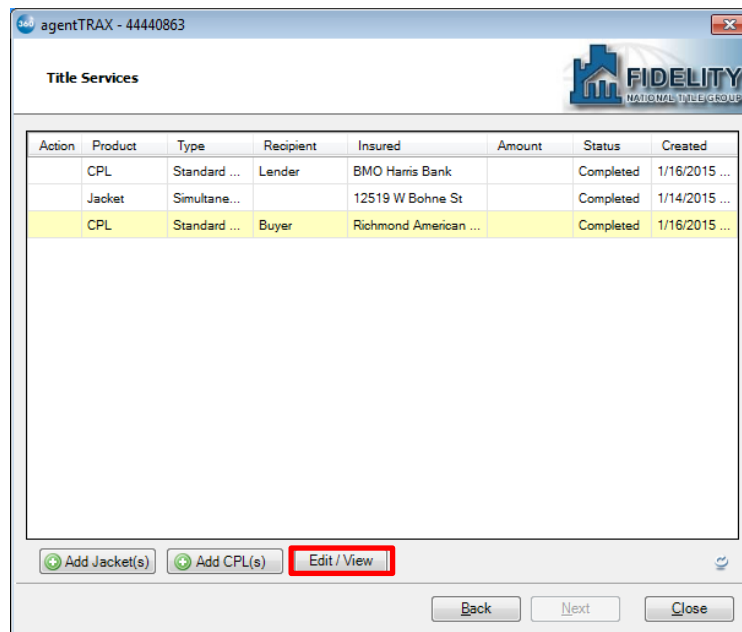

How to Edit and Void a Closing Protection Letter (CPL) in agentTRAX

A CPL can be edited or voided if it has an Active status in agentTRAX. To access a CPL, follow the log in steps found on pages 1 – 3 of this document. After logging in and selecting the company/underwriter, the **Title Services** screen will appear. All CPLs and jackets created for the order will be displayed. To edit or void a CPL, highlight the desired CPL and click **Edit/View**.

How to Edit a CPL in agentTRAX

The **CPL Summary** screen will be displayed. To edit a CPL, click **Edit**.

The **CPL Information** screen will appear when the **Edit** button is clicked.

The following fields can be edited in a CPL

Lender CPL	Buyer CPL	Seller CPL
• Property Street Address • Property City • Property State • Property Zip • Property County • Buyer/Borrower • Loan Number • Lender Name • Lender Clause • Lender Attention • Lender Address • Lender City • Lender State • Lender Zip	• Property Street Address • Property City • Property State • Property Zip • Property County • Buyer/Borrower • Buyer Address • Buyer City • Buyer State • Buyer Zip	• Property Street Address • Property City • Property State • Property Zip • Property County • Buyer/Borrower • Seller Name • Seller Address • Seller City • Seller State • Seller Zip

Make corrections to the above fields and click **Submit** to continue.

If fields other than these need to be changed on the CPL, the user should void the CPL and issue another CPL in its place.

How to Void a CPL in agentTRAX

To void a CPL, when the **CPL Summary** screen is displayed, click on the **Void** button.

The **Cancel Letter** screen will appear when the **Void** button is clicked. Click **Yes** to confirm voiding the CPL.

Note, once voided, a CPL cannot be reinstated. A new CPL will need to be created.

How to view Document History for a CPL in agentTRAX

To view the document history, when the **CPL Summary** screen is displayed, click on the **Document History** button.

Upon clicking the **Document History** button, the **Document History** screen will appear. To go back to the **CPL Summary** screen, click on the **Close** button.