

Obtaining Approval and Adding a New Attorney

Follow these steps to obtain approval and add the approved Attorney when,

- › Data entry in SoftPro is completed | [Page 1](#)
- › Data entry in SoftPro is not completed | [Page 4](#)

Obtaining Approval for a New Attorney

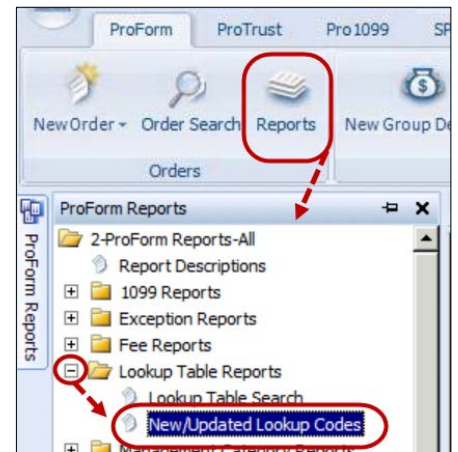
1. Send the attorney’s application and Professional Liability Insurance policy to approved.attorney@fnf.com

Once the attorney is entered in TRAX, you will receive an email from approved.attorney@fnf.com with the CLUP/Customer ID number.

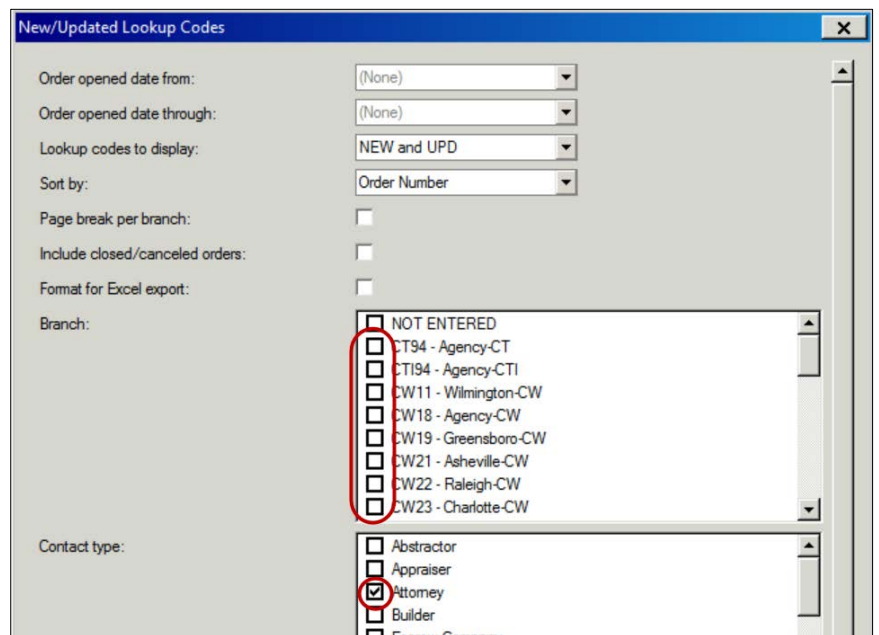
Data Entry in SoftPro is completed

Locating the Order in SoftPro

2. Click the **Reports** button
3. Expand the **Lookup Table Reports** folder
4. Double-click the **New/Updated Lookup Codes** report



5. Check your **Branch** check box
6. In the **Contact type**, check **Attorney** check box
7. Click the **OK** button to run the report



Obtaining Approval and Adding a New Attorney

Adding the Attorney to the Order

- Open the order identified in the report

Fidelity National Title Insurance Company
1410 Commonwealth Drive, Suite 204
Wilmington, NC 28403

New/Updated Lookup Codes
Order Contact Lookup Code = NEW or UPD/UPDATE

Contact Type: Attorney
Include Closed/Canceled Orders: No

BRANCH: FNT74 - Fidelity National Title Company, LLC - Charlotte-FNT

New Contact: *Page, Scrantom, Sprouse, Tucker
Attorney 1111 Bay Avenue, Third Floor, ATTN: Kristina Ragan
Columbus, GA 31902
Phone: (706)243-4064
Fax: (704)596-9992
Email: krr@psstf.com

Order Number: CH17000165
Closer:
Examiner: Christopher Eimer
Received Date: 12/04/17 09:00 am
Received By: Christopher Eimer

- Navigate to the **Order Contacts** screen

- Double-click the **Attorney** placeholder

- Click the **Lookup code** link

- In the **Search** field, enter search criteria to make sure the attorney does not already exist

Attorney

Lookup code: []

Name: []

Short name: []

Payee name: []

Lookup Table - C - Attorney APPROVED - NC.FT

Retrieve Entry | Insert Entry | Search: Attorney search criteria

Found 0 matches.

Lookup Code	Name	Payee Name	Address (line 1)
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- Press the **Enter** key

- Close the **Lookup Table** window

- Enter the Attorney information,

- In the **Lookup Code** field, enter the new code; the code is made up of
 - the first set of **CLUP** numbers (i.e., **CLUP** = 12345.1.81.33, you would enter **12345**)
 - the abbreviation for the licensing state

Attorney

Lookup code: 67890NC1

Name: []

Short name: []

Include on revenue reports
 Marketing source

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IMPORTANT: Create the **Lookup Code** using the abbreviation for the **approved** licensing state.

Scenario One:

The Attorney is licensed in North and South Carolina and has two locations: one in Charlotte, NC and one in Rock Hill, SC. The Attorney is only approved in North Carolina (TRAX Id 12345). The entries would be:

- » 12345NC1, for the Charlotte, NC location
- » 12345NC2, for the Rock Hill location

Two codes are setup because no licensing information is received for the South Carolina location; the Attorney is only approved for the North Carolina location.

Scenario Two:


The Attorney is licensed in North and South Carolina and two locations: one in Charlotte, NC and one in Rock Hill, SC. The Attorney is approved in North Carolina and South Carolina (TRAX Id 7890). The entries would be:

- » 7890NC1, for the Charlotte, NC location
- » 7890NC2, for the Rock Hill location
- » 7890SC1, for the Charlotte, NC location
- » 7890SC2, for the Rock Hill, SC location

Four codes are setup because licensing information is received and they are approved for both locations.

- b) From the **Marketing Rep** drop-down menu, select **HOUSE** or, if applicable, the marketing representative for your office

- c) From the **Represents** drop-down menu, select **BA**

- d) Click the **Lookup code** link
- e) Click the **Insert Entry** button
- f) Click the **Save**  icon
- g) **Close** the **Lookup Table** window

16. **Save** your order

Obtaining Approval and Adding a New Attorney

Data Entry in SoftPro is Not Completed

Verifying the Attorney

2. Open your order

NOTE: If you have not already opened an order, you can use your Branch's **ApprovedAttorney** order to verify the attorney has not been added.

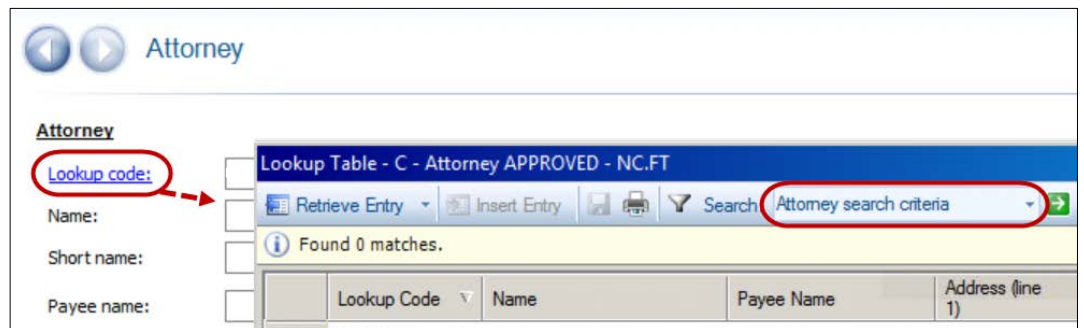
1. In the **Quick Order Search** field, enter *[branch initials]ApprovedAttorney* (e.g., Raleigh = **RA**ApprovedAttorney, Blowing Rock = **BR**ApprovedAttorney)
2. Continue with **Step 3**

3. Navigate to the **Order Contacts** screen

4. Double-click the **Attorney** placeholder

5. Click the **Lookup code** link

6. In the **Search** field, enter search criteria to make sure the attorney does not already exist



7. Press the **Enter** key

8. Close the **Lookup Table** window

Adding the Attorney to the Lookup Table

9. Enter the Attorney information,
 - a) In the **Lookup Code** field, enter the new code; the code is made up of
 - i. the first set of **CLUP** numbers (i.e., **CLUP** = 12345.1.81.33, you would enter **12345**)
 - ii. the abbreviation for the licensing state; refer to the IMPORTANT note above when entering
 - b) In the **Name** field, enter the Attorney's name
 - c) In the **Payee name** field overwrite with the Firm name
 - d) Enter the **Address, City/State/Zip, Phone, Email address**
 - e) From the **Marketing Rep** drop-down menu, select **HOUSE** or if applicable, the marketing representative for your office
 - f) In the **License #** field, enter the Attorney's state bar number
 - g) From the **Represents** drop-down menu, select **BA**

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Attorney

[Lookup code:](#) 67890NC1 Include on revenue reports

Name: **(b)** Enter Attorney Name Marketing source

Short name: Enter Attorney Name

Payee name: **(c)** Enter Firm Name Marketing rep.: **(e)** HOUSE

Address: **(d)** 123 Main Street Marketing rep. 2: Marketing rep. 3:

[City/State/Zip:](#) Raleigh NC 27697- Foreign Reference #:


Phone: 222-111-3333 Fax: 222-111-4444 Tax ID/SSN:

Email address: FirmName@yahoo.net License #: **(f)**

Fee transfer ledger: ...

Anticipate funds as: Receipt

Represents: **(g)** BA

- h) Click the **Lookup code** link
- i) Click the **Insert Entry** button
- j) Click the **Save**  icon
- k) **Close** the **Lookup Table** window

Attorney

Lookup code: 67890NC1

Name: En

Short name: En

Payee name: En

Lookup Table - C - Attorney APPROVED - NC.FT

Retrieve Entry Insert Entry Search:

Lookup Code	Name	Payee N
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17. **Save** your order