

## Updating or Terminating an Attorney Contact

Follow these steps to update the Attorney contact information when,

- › Data entry in SoftPro is completed | [Page 1](#)
- › Data entry in SoftPro is not completed | [Page 4](#)
- › Terminating | [Page 6](#)

### Submitting Changes

1. Send the attorney's Professional Liability Insurance policy to [approved.attorney@fnf.com](mailto:approved.attorney@fnf.com) if the,
  - › Firm has a name change
  - › Attorney has changed firms

NOTE: The Professional Liability Insurance policy is not required if submitting only an address change.

Include with your submission,

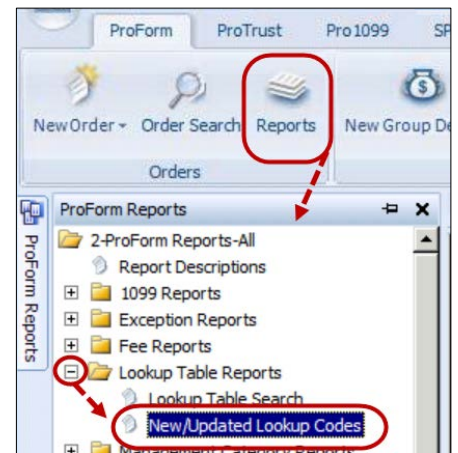
- › Attorney name
- › DBA/Firm name
- › Address; this cannot be a post office box
- › Phone
- › Fax
- › Attorney's email address

Continue to Step 2 in the appropriate section

### 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



## Updating or Terminating an Attorney Contact

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

**New/Updated Lookup Codes**

Order opened date from: (None)

Order opened date through: (None)

Lookup codes to display: NEW and UPD

Sort by: Order Number

Page break per branch:

Include closed/canceled orders:

Format for Excel export:

Branch:

- NOT ENTERED
- CT94 - Agency-CT
- CT194 - Agency-CTI
- CW11 - Wilmington-CW
- CW18 - Agency-CW
- CW19 - Greensboro-CW
- CW21 - Asheville-CW
- CW22 - Raleigh-CW
- CW23 - Charlotte-CW

Contact type:

- Abstractor
- Appraiser
- Attorney
- Builder
- Escrow Company

### Updating the Attorney in the Order

8. Open the order identified in the report

**Fidelity National Title Insurance Company**  
5950 Fairview Road, Suite 711  
Charlotte, NC 28210

**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**

Updated Contact: \*Page, Scrantom, Sprouse, Tucker  
Attorney 1111 Bay Avenue, Third Floor, ATTN: Kristina Reagan  
Columbus, GA 31902  
Phone: (706)243-4064  
Fax: (704\_596-9992  
Email: krr@pssif.com

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

9. Navigate to the **Order Contacts** screen
10. Double-click the **Attorney** placeholder
11. Click the **Lookup code** link
12. In the **Search** field, enter search criteria to find the existing attorney record
13. Make note of the **Lookup Code**; close the **Lookup Table** window

**Attorney**

11 [Lookup code:](#)

Name:

Short name:

Payee name:

Address:

UPD

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City of

1111 B

ATTN:

**Lookup Table - C - Attorney APPROVED - NC.FT**

Retrieve Entry Insert Entry Search scrantom 12

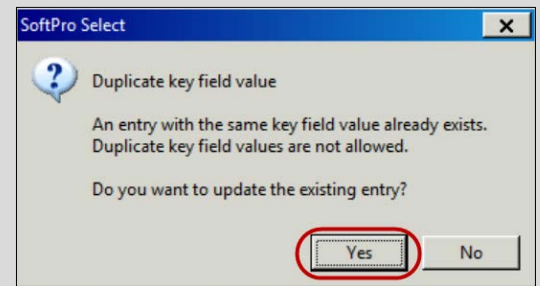
Found 1 match.


Lookup Code	Name	Payee Name	Address (line 1)
13 12345NC1	Page, Scrantom, Sprouse, T...	City of Oaks Law	1111 Bay Aven...

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14. In the **Lookup code** field, enter the **Lookup Code** noted above
15. Enter the updated Attorney information
16. Click the **Lookup code** link
17. Click the **Insert Entry** button

NOTE: If you are updating information but the **Lookup Code** remains the same, a **Duplicate key field value** message is displayed when the **Insert Entry** button is pressed. Click **Yes** to update the existing record with the new information.



18. Click the **Save**  icon
19. Close the **Lookup Table** window
20. **Save** your order

### Data Entry in SoftPro is Not Completed

#### Verifying the Attorney

2. Open your order

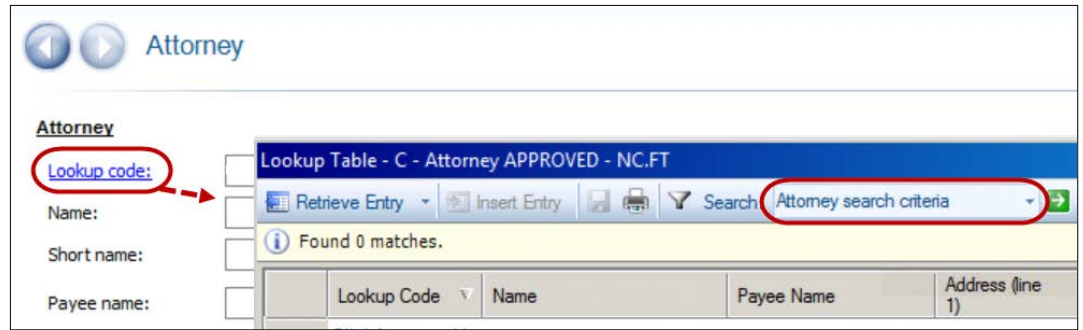
NOTE: If you have not already opened an order, you can use your Branch's **ApprovedAttorney** order to verify the attorney has not been added.

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

3. Navigate to the **Order Contacts** screen
4. Double-click the **Attorney** placeholder

## Updating or Terminating an Attorney Contact

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



### Updating the Attorney in 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

**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 approved for North Carolina only (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.

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- 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**

The screenshot shows the 'Attorney' form with the following fields and annotations:

- b**: Name field containing 'Enter Attorney Name'.
- c**: Payee name field containing 'Enter Firm Name'.
- d**: Address field containing '123 Main Street'.
- e**: Marketing rep. dropdown menu set to 'HOUSE'.
- f**: License # field.
- g**: Represents dropdown menu set to 'BA'.

Other visible fields include: Lookup code (67890NC1), Short name (Enter Attorney Name), City/State/Zip (Raleigh, NC, 27697-), Phone (222-111-3333), Fax (222-111-4444), Email address (FirmName@yahoo.net), and Anticipate funds as (Receipt).

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

21. **Save** your order

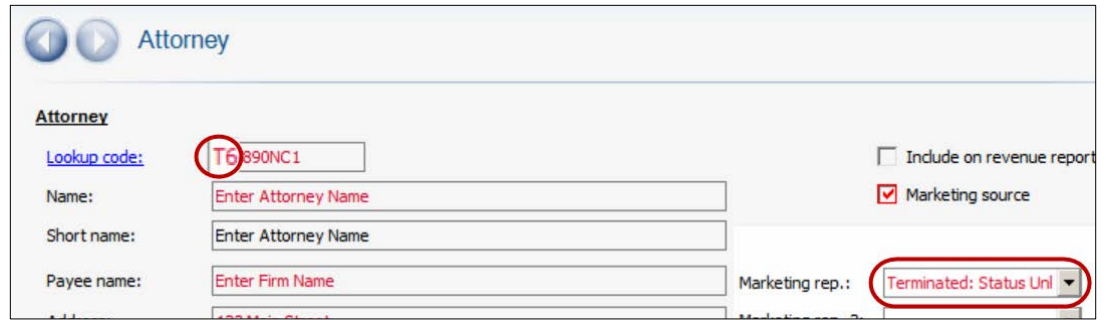
The screenshot shows the 'Attorney' form with a 'Lookup Table - C - Attorney APPROVED - NC.FT' window open. The 'Lookup code' field is circled in red, and the 'Insert Entry' button in the table toolbar is also circled in red.

### Terminating an Attorney

1. Navigate to the **Order Contacts** screen
2. Double-click the **Attorney** Contact entry

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3. In the **Lookup Code** field, insert the letter **'T'** before the code; this allows for a user to quickly see they are terminated and resolves the issue of the Attorney being pulled into another order

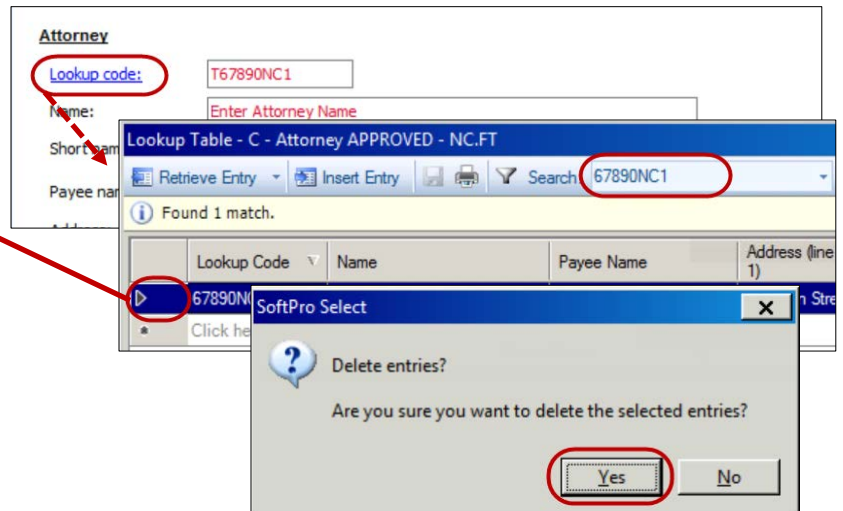


4. From the **Marketing rep** drop-down, select the reason for termination (i.e., **Terminated: Deceased**, **Terminated: Status Unknown**)

5. Click the **Lookup code** link

6. Search for the Attorney you wish to terminate

7. Click the left-most column, highlighting the entire record



8. Press the **Delete** key; click the **Yes** button

9. Close the **Lookup Table** window

10. When prompted, click **Yes** to save the changes

11. **Save** the order

