

agentTRAX

USER GUIDE

OCTOBER 17, 2019

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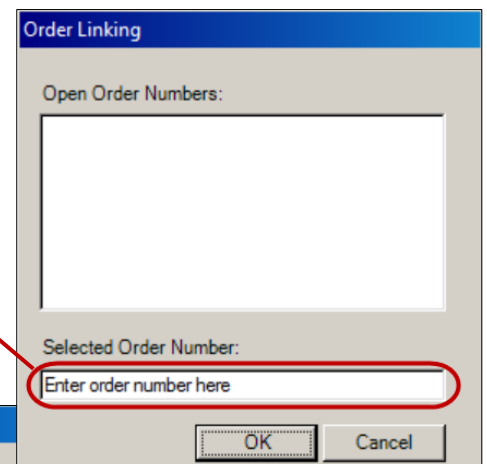
The agentTRAX application allows you to order Closing Protection Letters, Policy Jackets, obtain High Liability Approvals while in your SoftPro order. The application pulls information from your SoftPro order into agentTRAX eliminating duplicate entry.

Accessing agentTRAX

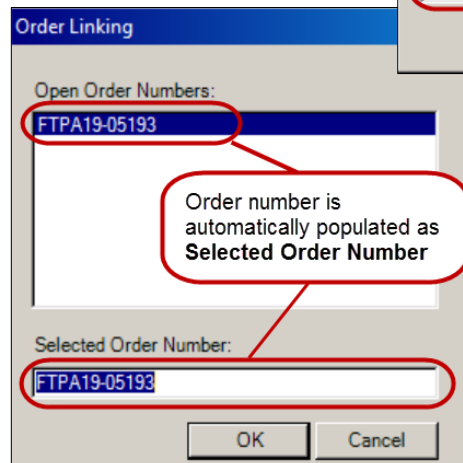
You do not need to have an order open to access agentTRAX.

From the 360 ribbon,

1. Select the Services button
2. Click the Underwriter Services folder to expand
3. Double-click FNTG – agentTRAX
4. From the Order Linking window,
 - › If no order is open, enter the corresponding order in the Selected Order Number field



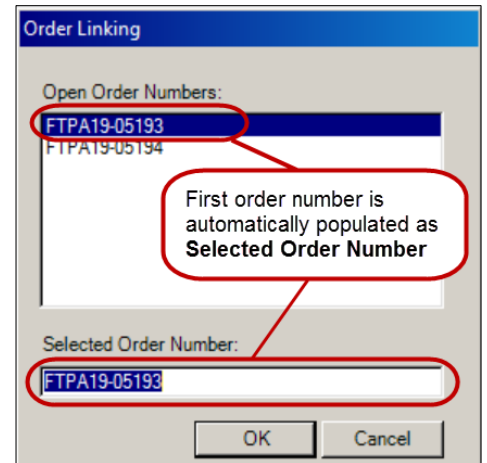
- › If a single order is open, the order number is shown in the Open Order Numbers field and the Selected Order Number field



NOTE: The Selected Order Number field can be overwritten with an order that is not open.

- › If multiple orders are open, all order numbers appear in the Open Order Numbers field and the first order is displayed in the Selected Order Number field
 - a) Highlight an order in the Open Order Numbers field to select the applicable order

5. Press the OK button to continue



Selecting the Company/Underwriter

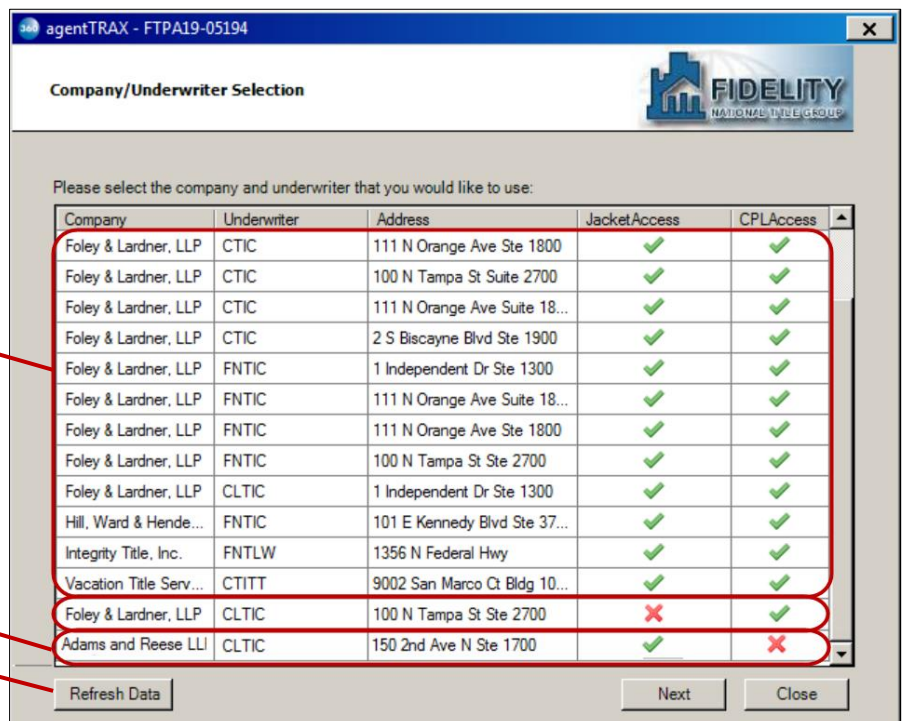
The Company/Underwriter Selection window opens showing companies that are available and identifies if the Company/Underwriter can issue a CPL and/or Policy Jacket for the Property State entered in your SoftPro order.

The default setting is to group the Companies alphabetically by those that can,

- › issue the Jacket and the CPL

- › only issue the CPL

- › only issue the Jacket



NOTE: The columns can be sorted in *ascending* or *descending* order by any of the column headers (i.e. *Company* or *Underwriter*).

1. Click the *title field* to sort
2. Click the Refresh Data button to return to the original view

Company	Underwriter	Address	JacketAccess	CPLAccess
Adams and Reese LLP	CLTIC	150 2nd Ave N Ste 1700	✓	✓
Adams and Reese LLP	FNTIC	101 E Kennedy Blvd Ste 40...	✓	✓
Hill, Ward & Henderson, PA	FNTIC	101 E Kennedy Blvd Ste 37...	✓	✓

6. Highlight the applicable entry
7. Click the Next button

Company	Underwriter	Address	JacketAccess	CPLAccess
Adams and Reese LLP	CLTIC	150 2nd Ave N Ste 1700	✓	✓
Adams and Reese LLP	FNTIC	101 E Kennedy Blvd Ste 40...	✓	✓
Adams and Reese LLP	CTIC	101 E Kennedy Blvd Ste 40...	✓	✓
Foley & Lardner, LLP	CTIC	111 N Orange Ave Ste 1800	✓	✓
Foley & Lardner, LLP	CTIC	100 N Tampa St Suite 2700	✓	✓
Foley & Lardner, LLP	CTIC	111 N Orange Ave Suite 18...	✓	✓

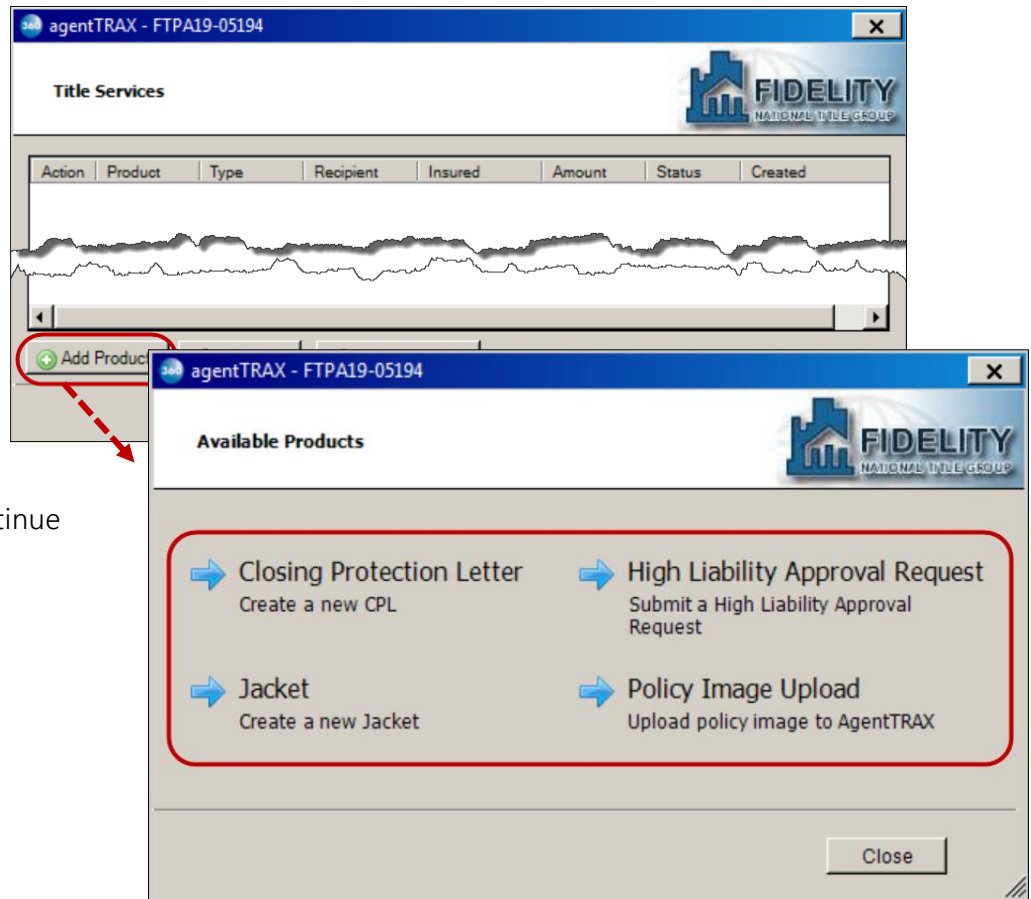
8. Agent Name to be shown, check the applicable radio button
9. Click the Next button

Agent Name to be shown as:

DBA
 Legal Name
 Both

From the Title Services window,

10. Click the Add Product button to open the Available Products window.



11. Click a Product link to continue

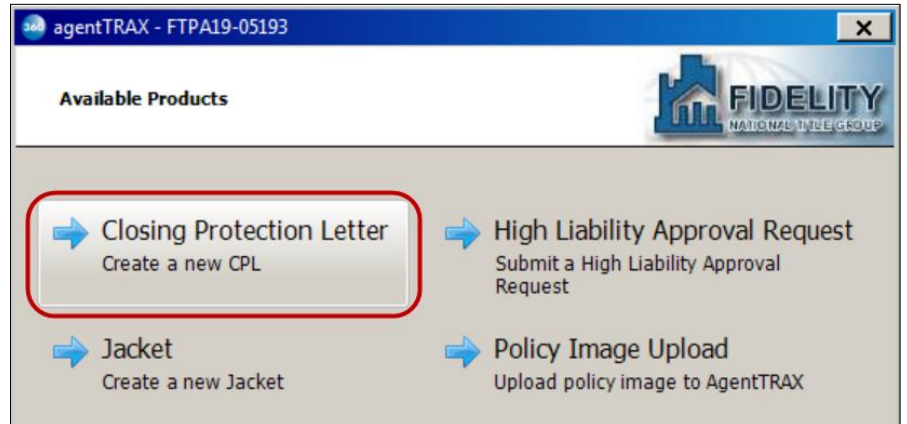
Follow the steps in the corresponding section

- › Closing Protection Letter – continue to next page
- › Jacket – skip to page
- › High Liability Approval Request – skip to page
- › Policy Image Upload – skip to page

Closing Protection Letters

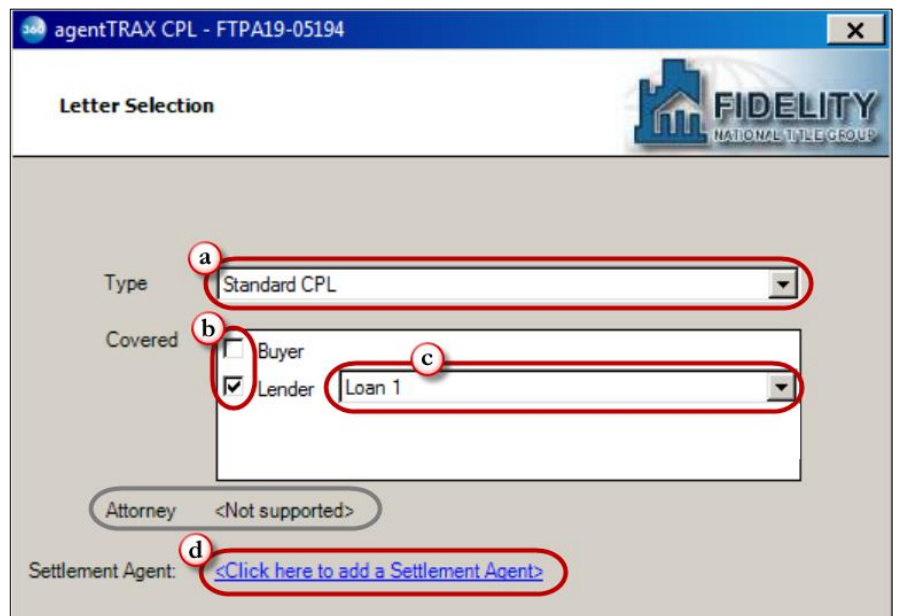
Submitting the Initial Request

1. Click the Closing Protection Letter link



2. From the Letter Selection window, verify or select the,

- a) Type – the type of Letter available is determined by the state of the Agent's ID; the default is Standard CPL
- b) Covered – the available parties (Lender, Buyer and Seller) is determined by the Type of Letter
 - » If Type = Agent in Good Standing the available parties is Lender
 - » If Type = Standard Letter, the available parties is Lender, Buyer and/or Seller (depending upon the type of transaction)



- c) If your order has more than one loan, select the loan

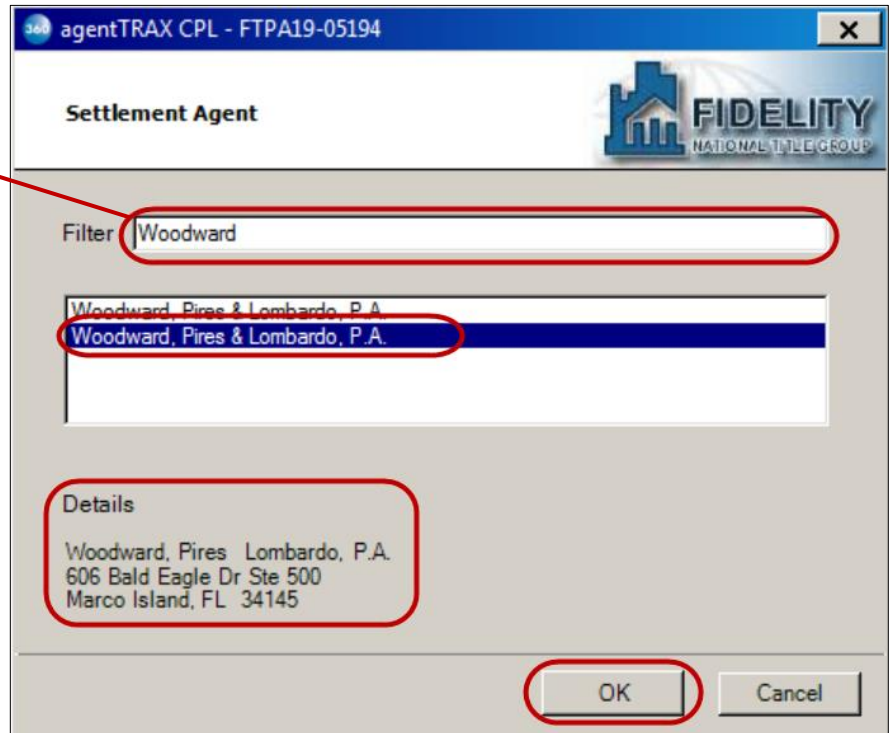
NOTE: Attorney – shows <Not supported> based on your profile settings; reach out to your Sales Representative or the agentTRAX helpdesk if you need access to the approved attorney list.

- d) Settlement Agent – click the <Click here to add a Settlement Agent> link

3. Select an approved Settlement Agent

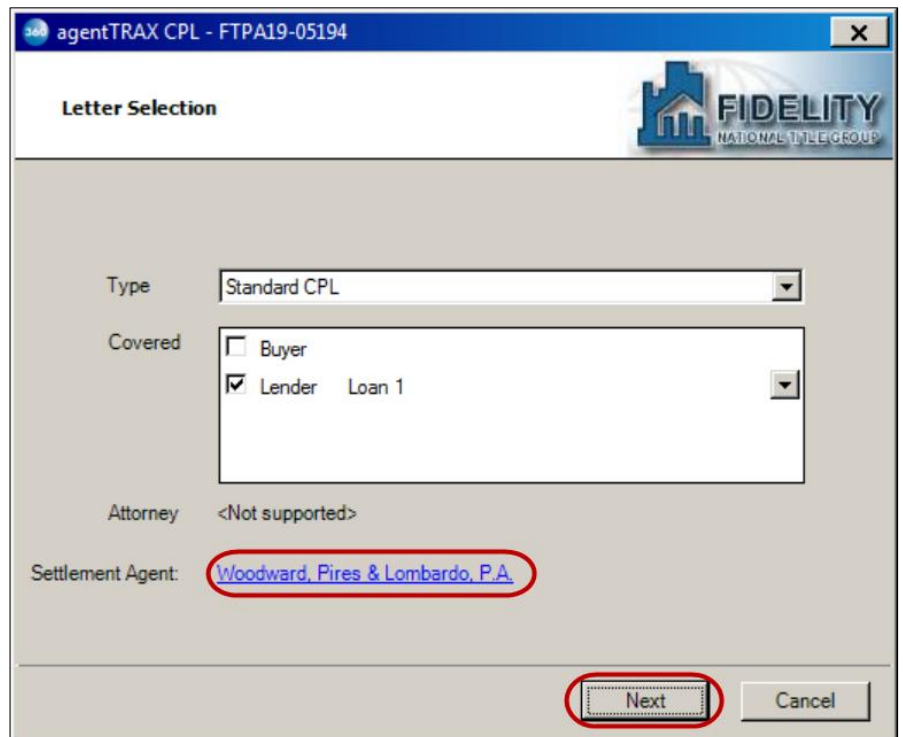
HINT: Use the Filter field if you know the name or part of the name of the Settlement Agent to quickly locate the entry. The list filters as you type.

4. Verify Details to confirm your selection is correct
5. Click the OK button



The Settlement Agent shows your selection on the Letter Selection window.

6. Click the Next button



7. From the CPL Information window,
 - a) Verify the information shown; the information is pulled from your SoftPro order but may be changed if needed
 - b) Lender Clause, select from the drop-down, if needed
 - c) Click Submit

NOTE: Any information changed here does not write back to your SoftPro order.

Once the request is submitted, the Review Closing Protection Letter(s) window is shown listing the requested CPL(s).

8. Check the individual check box for the corresponding CPL or the All check box to accept all CPL(s)

From the Review window you can,

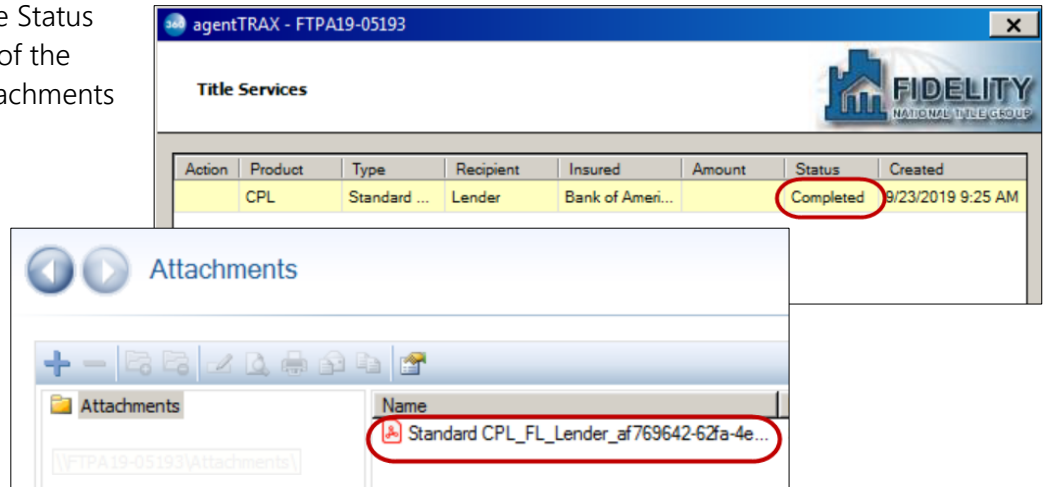
- > Click the View icon to view the CPL on screen
- > Click the Copy icon; this copies the CPL to the clipboard

NOTE: A copy of the document is also saved to the Order Attachments screen.

View	Copy	File Name	File Size	Transferred
<input checked="" type="checkbox"/>		Standard CPL_FL_Lender_f17d8bd4-0959...	77483	100%

9. Click the Accept button

The Title Services window shows the Status updated to Completed and a copy of the document is saved to the order Attachments screen.



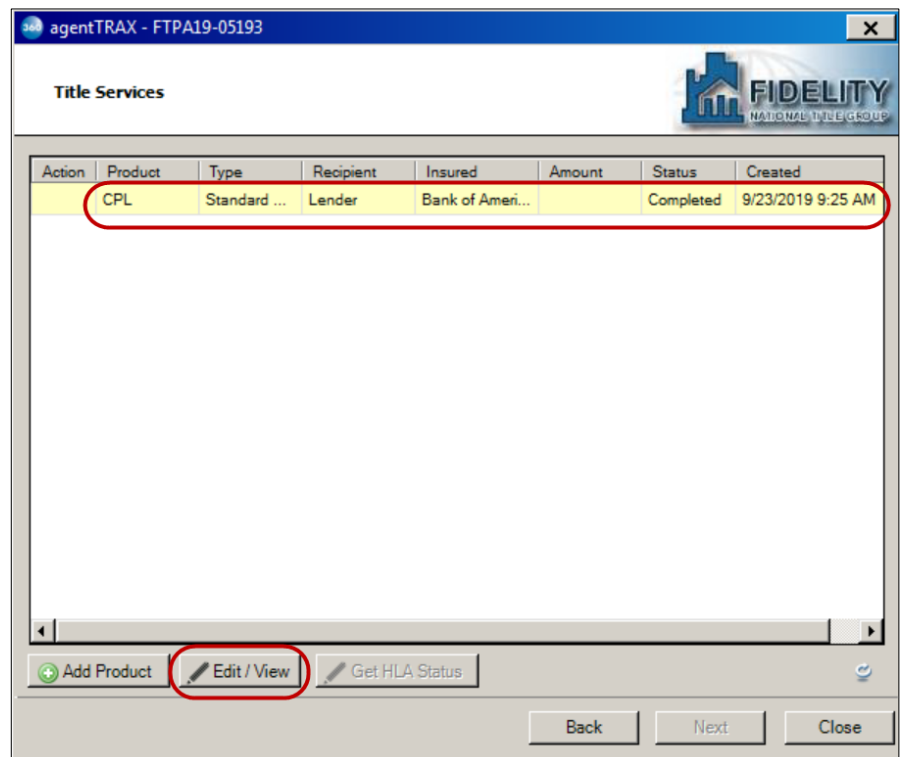
Editing a Closing Protection Letter

From the Title Services window, you can edit an active (not canceled) Closing Protection Letter.

1. With the applicable order open, access the Title Services window; refer to Steps 1-9 (pages 1-4) if needed

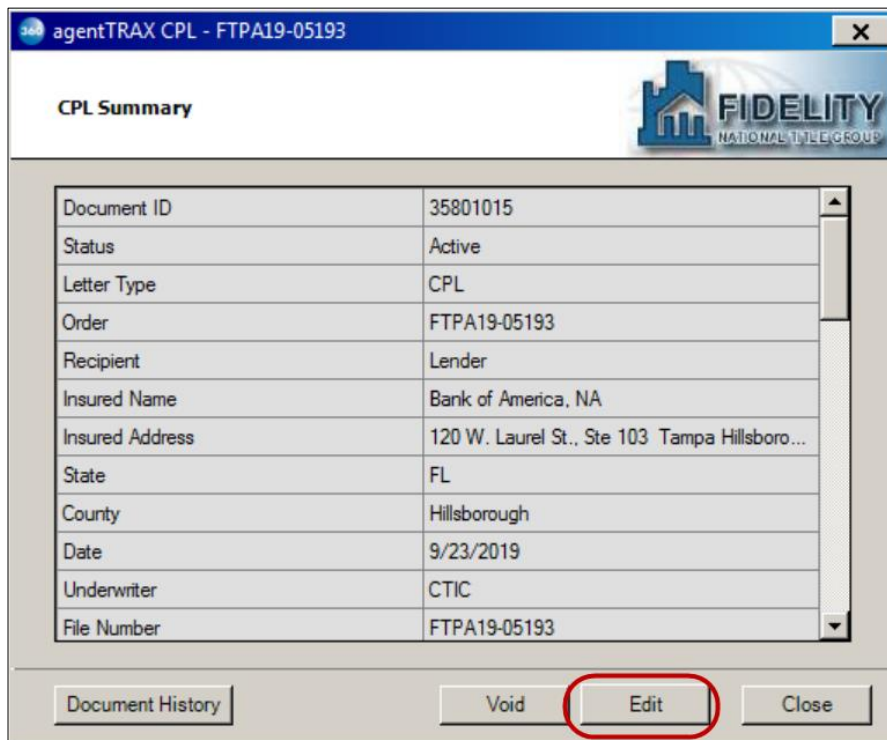
The Title Services window shows all agentTRAX activity for the corresponding order.

2. Highlight the applicable CPL
3. Click the Edit/View button



The CPL Summary window shows data from the original Closing Protection Letter.

4. Click the Edit button



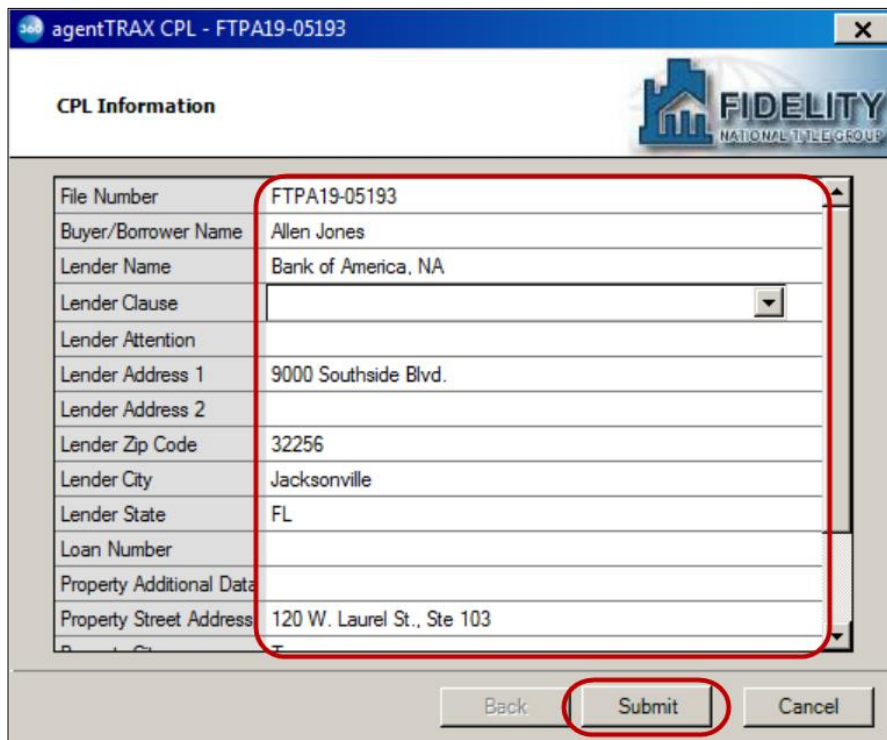
CPL Summary	
Document ID	35801015
Status	Active
Letter Type	CPL
Order	FTPA19-05193
Recipient	Lender
Insured Name	Bank of America, NA
Insured Address	120 W. Laurel St., Ste 103 Tampa Hillsboro...
State	FL
County	Hillsborough
Date	9/23/2019
Underwriter	CTIC
File Number	FTPA19-05193

NOTE: The Document History button allows you to view when and who created or modified the document.


5. From the CPL Information window, click the Edit button
6. Enter new data as needed

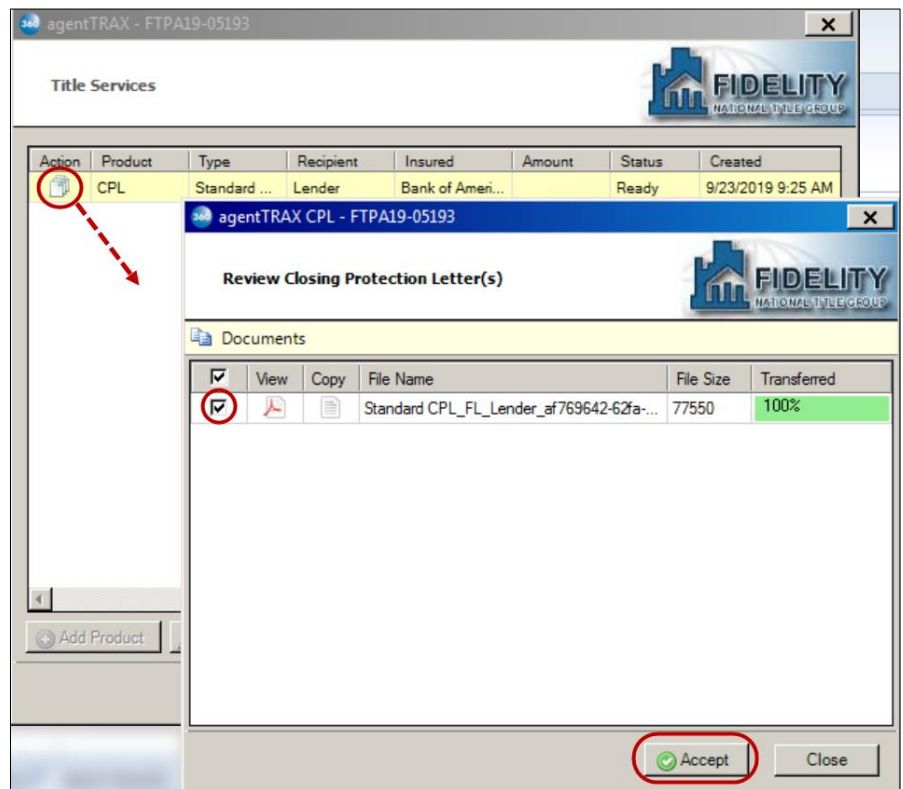
NOTE: Changes made here do **not** write back to your order.

7. Click the Submit button



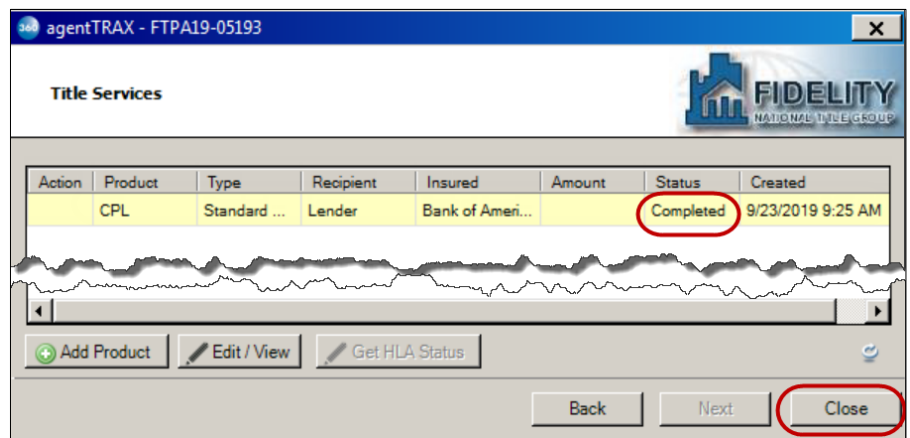
CPL Information	
File Number	FTPA19-05193
Buyer/Borrower Name	Allen Jones
Lender Name	Bank of America, NA
Lender Clause	
Lender Attention	
Lender Address 1	9000 Southside Blvd.
Lender Address 2	
Lender Zip Code	32256
Lender City	Jacksonville
Lender State	FL
Loan Number	
Property Additional Data	
Property Street Address	120 W. Laurel St., Ste 103

8. Click the Action  icon
9. From the Review window, if multiple CPLs, check the corresponding check box for the edited CPL
10. Click the Accept button



The Title Services window shows the Status as Completed.

11. Click the Close button



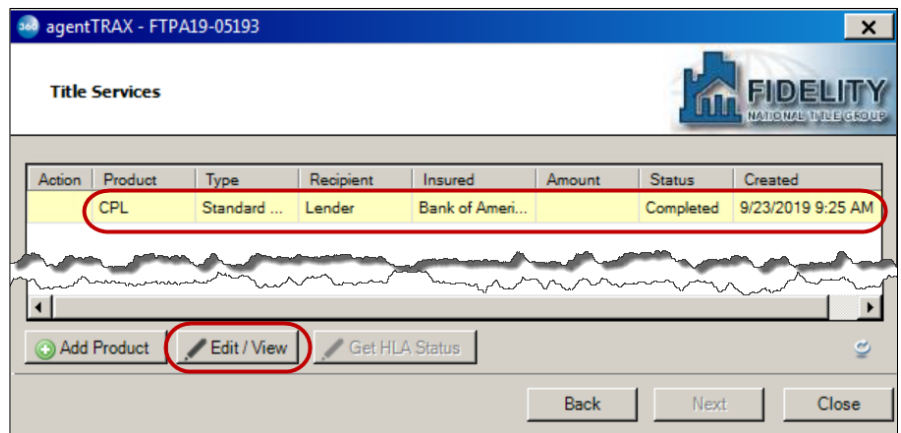
Canceling (Voiding) a Closing Protection Letter

IMPORTANT: Once canceled, a CPL cannot be reinstated. You must create a new CPL if needed.

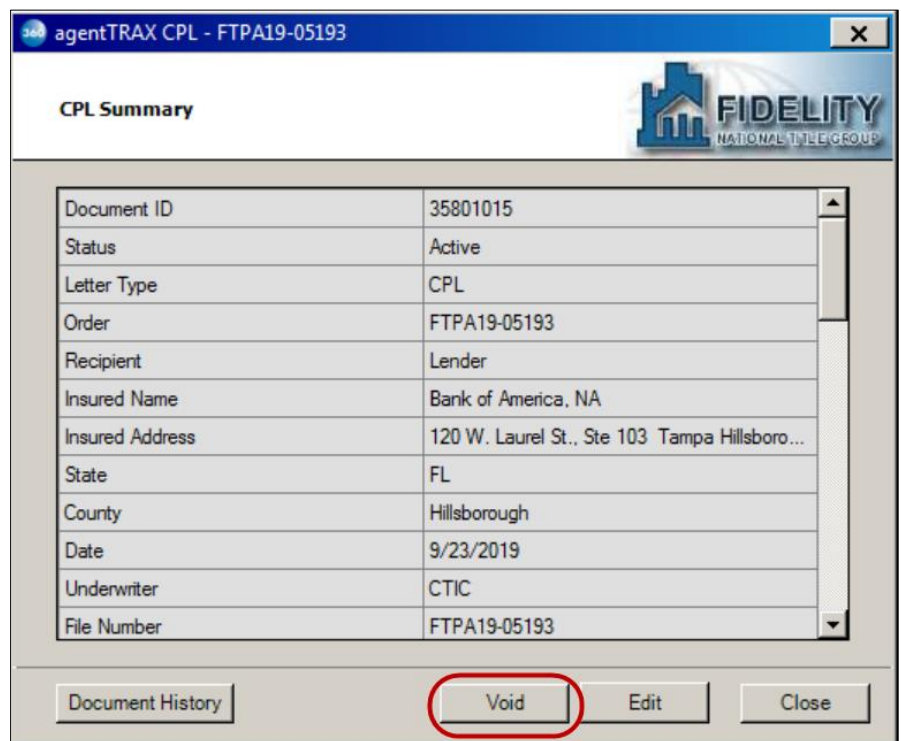
1. With the applicable order open, access the Title Services window; refer to **Steps 1-9** (pages 1-4) if needed

The Title Services window shows all agentTRAX activity for the corresponding order.

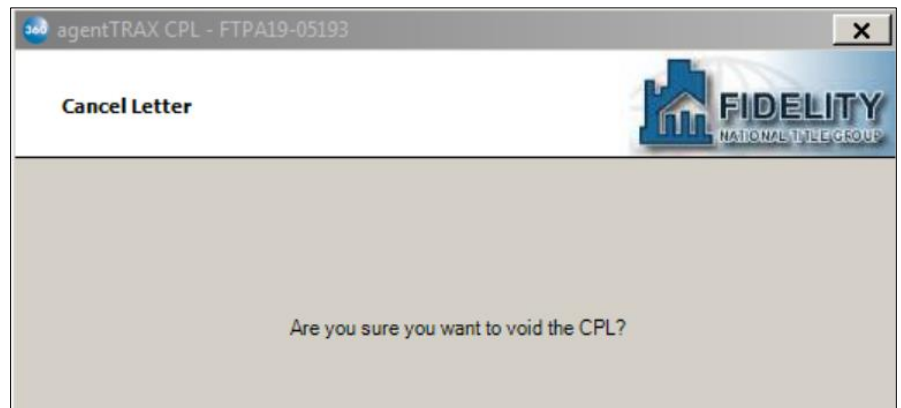
2. Highlight the applicable CPL
3. Click the Edit/View button



4. From the CPL Summary window, click the Void button



5. When prompted click Yes to confirm cancellation



The Title Services window shows the Status as Canceled.

6. Click the Close button

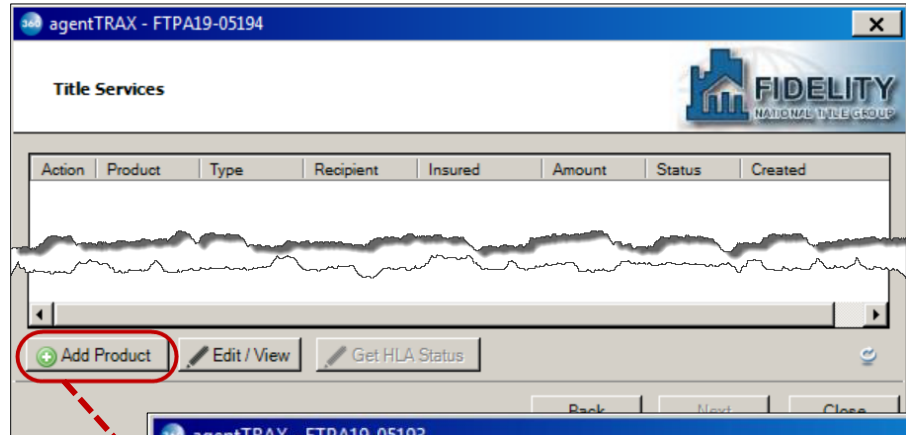
High Liability Approval Request

With agentTRAX, you can create and submit, edit or cancel a High Liability Approval Request with information pulled from your order.

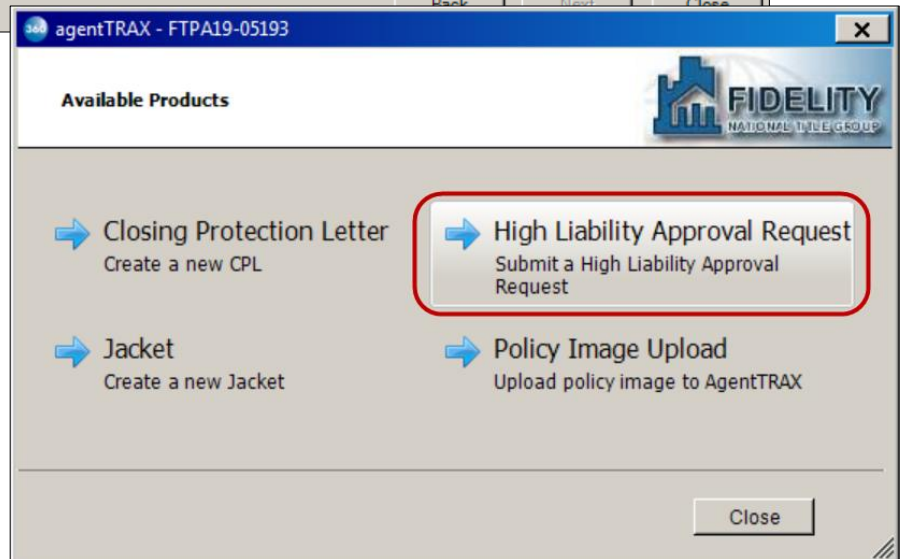
1. Access the Title Services window; refer to **Steps 1-9** (pages 1-4) if needed

From the Title Services window,

2. Click the Add Product button to open the Available Products window.



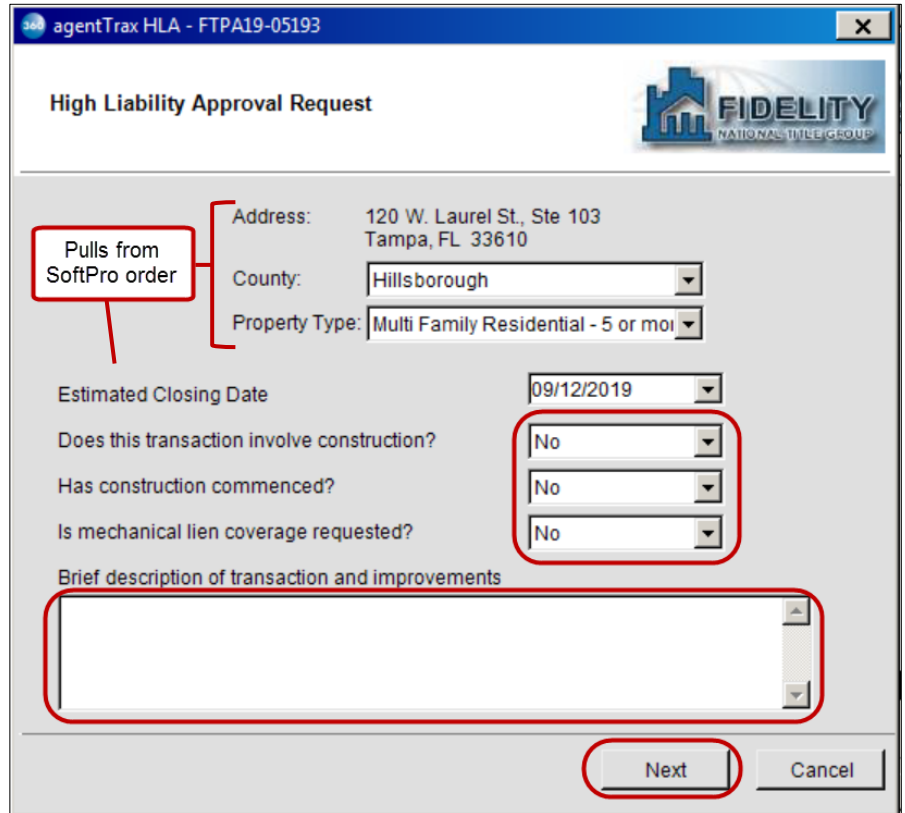
3. Click the High Liability Approval Request link



The High Liability Approval Request window pulls information from your SoftPro order.

4. Verify (or select) the,
 - a. Address shows the **first** property address from your order
 - b. County, if blank, select from drop-down; change if needed
 - c. Property Type, if blank, select from drop-down; change if needed
 - d. Estimated Closing Date; change if needed

NOTE: If changes are made in fields populated with information from your SoftPro order, the new information does **not** write back to your order.



agentTrax HLA - FTPA19-05193

High Liability Approval Request

FIDELITY NATIONAL TITLE GROUP

Address: 120 W. Laurel St., Ste 103
Tampa, FL 33610

County: Hillsborough

Property Type: Multi Family Residential - 5 or moi

Estimated Closing Date: 09/12/2019

Does this transaction involve construction? No

Has construction commenced? No

Is mechanical lien coverage requested? No

Brief description of transaction and improvements

Next Cancel

- e. Does this transaction involve construction defaults to,
 - i. Yes = Construction option is selected in SoftPro order
 - ii. No = Construction option is not selected in SoftPro order
 - f. Has construction commenced defaults to,
 - i. Yes = Construction option is selected in SoftPro order
 - ii. No = Construction option is not selected in SoftPro order
 - g. Is mechanical lien coverage requested = select from drop-down; this is a **required** field as indicated by the red asterisk
 - h. Brief description of transaction and improvements = optional, enter as needed
5. Click the Next button

6. From the High Liability Approval Order Information window, verify or select the,

- a. Contact = defaults to the user logged into 360; change if needed
- b. First Name, Last Name, Phone Number, Email Address = enter corresponding information (these are required fields)
- c. Policy grid
 - i. Policy Type – pulls from your SoftPro order
 - ii. Liability Amount – pulls from your SoftPro order
 - iii. Gross Premium = manually enter
 - iv. Net Premium = manually enter

d. Premium Details = optional, enter as needed

7. Click the Next button

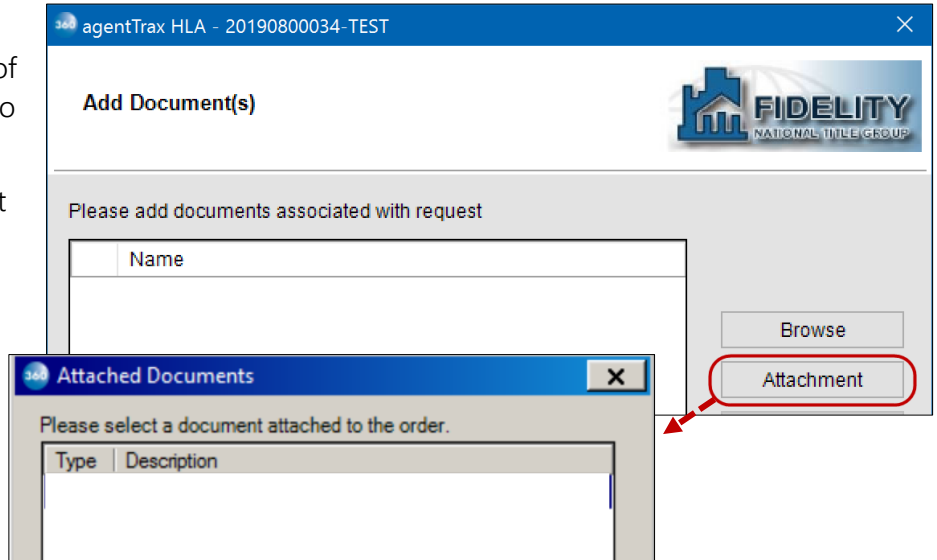
Adding Document(s)

NOTE: High Liability Approval requests **required** at least one document be submitted with the request.

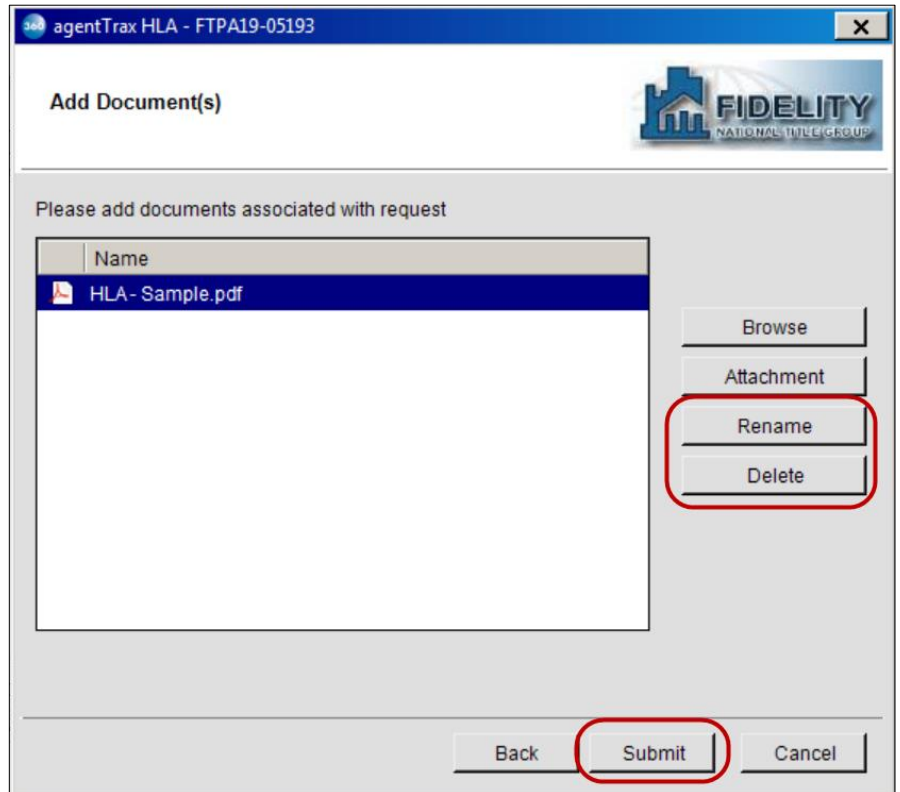
8. Select a document(s) to submit with your request

- > If from your local drive
 - a. Click the Browse button; this opens the File Explorer window
 - b. Navigate to the folder containing the document(s) to be submitted
 - c. Double-click the document you wish to submit

- › If from your Attachment folder in SoftPro
 - a. Click the Attachment button; this opens the list of attachments in your SoftPro order
 - b. Double-click the document you wish to submit



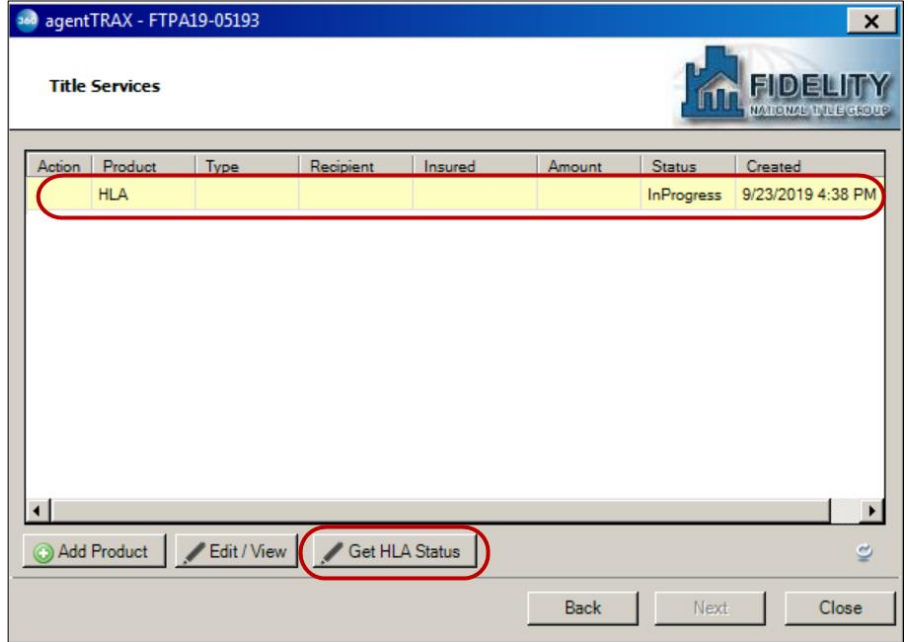
- 9. If needed, use the
 - › Rename button to enter a new document name
 - › Delete button to remove the attachment
- 10. Click the Submit button if no changes are needed



The Title Services window shows the Status as InProgress. agentTRAX checks every 24 hours for new approvals and updates the transactions accordingly.

If you receive an approval notification and the Title Services screen remains as InProgress,

1. Highlight the corresponding request
2. Click the Get HLA Status button to refresh the status

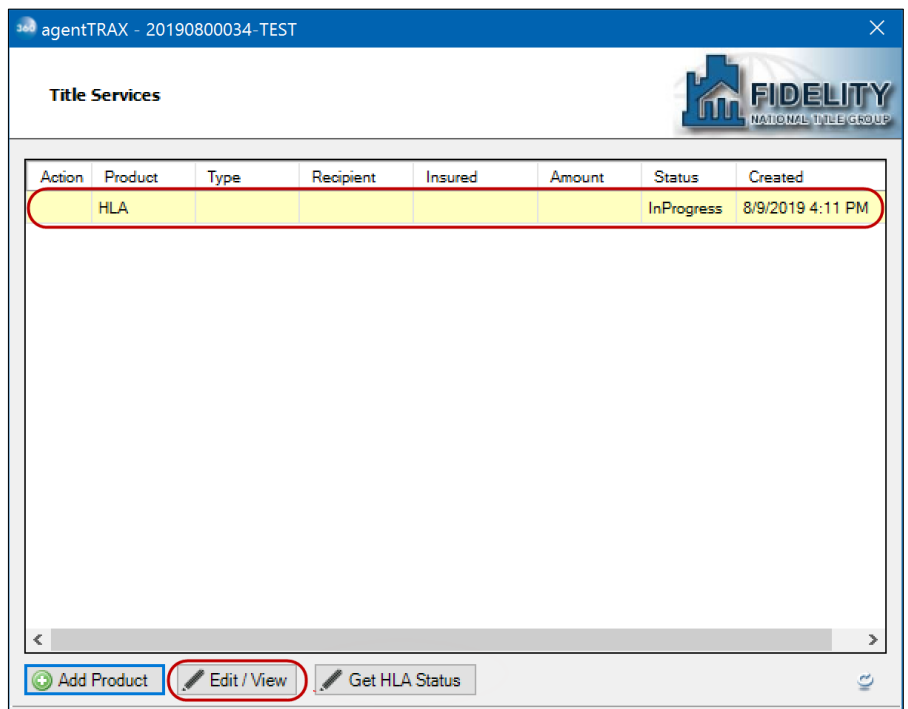


Editing a Submitted Request

A submitted HLA request can be edited once submitted and the Status shows as InProgress.

From the Title Services window,

1. Highlight the request you wish to edit
2. Click the Edit/View button



The High Liability Approval window shows the details of your original request.

3. Click the Edit button
4. Click OK to confirm you wish to edit

agentTrax HLA - 20190800034-TEST

High Liability Approval

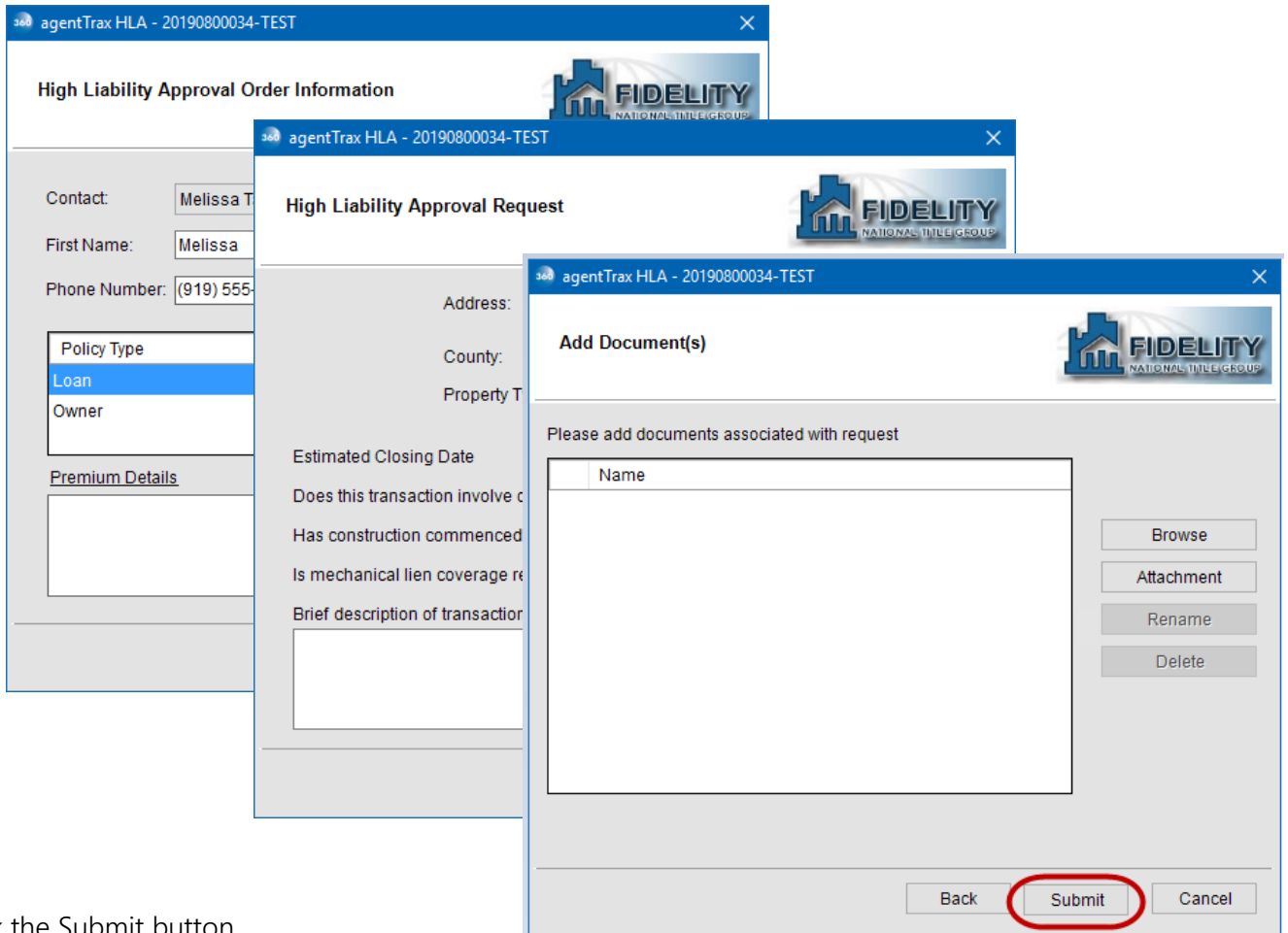
Address: 5621 East Side Avenue Austin, FL 73301
County: Broward
Property Type: 1-4 Family Residential (including Timeshares)

Estimated Closing Date: 08/30/2019
Does this transaction involve construction? No
Has construction commenced? No
Is mechanical lien coverage requested? Yes

Agent Number: 6781.3.72.09

Void Edit Cancel

5. Make the necessary edits on the applicable window; the original request information is shown
 - a) High Liability Approval Request window
 - i. Overwrite original information as needed
 - ii. Click Next once edits are entered or if no edits are needed
 - b) High Liability Approval Order Information window
 - i. Overwrite original information as needed
 - ii. Click Next once edits are entered or if no edits are needed
 - c) Add Document(s); you are not required to add additional documents
 - i. Add a document(s) – repeat steps in Adding Document(s) section, if needed

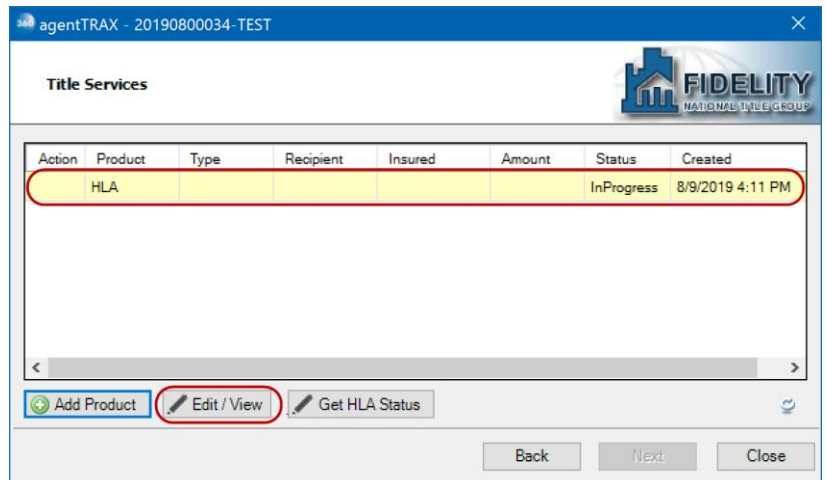


6. Click the Submit button

Canceling a Request

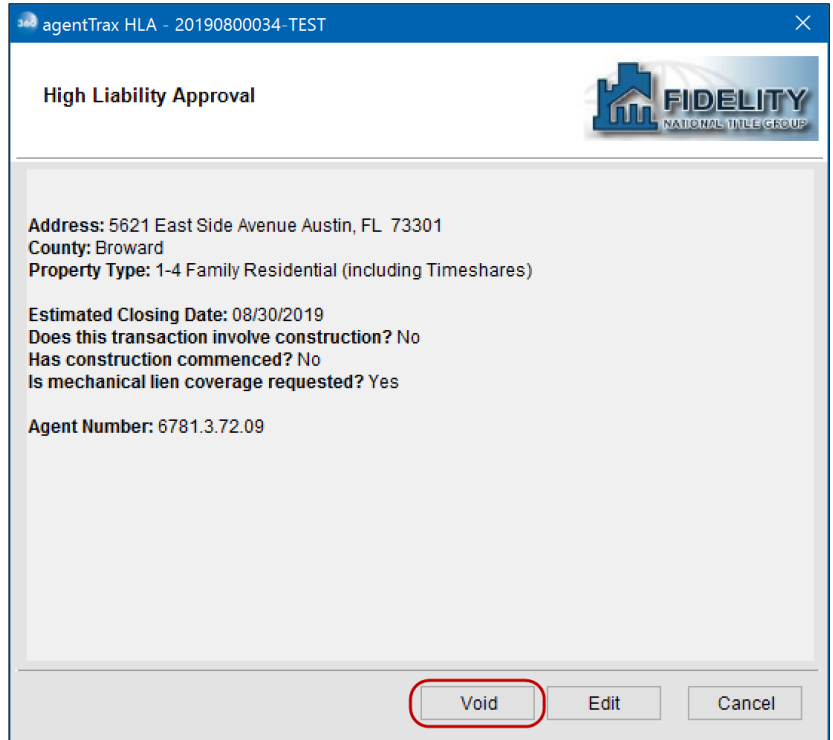
From the Title Services window,

1. Highlight the request you wish to cancel
2. Click the Edit/View button

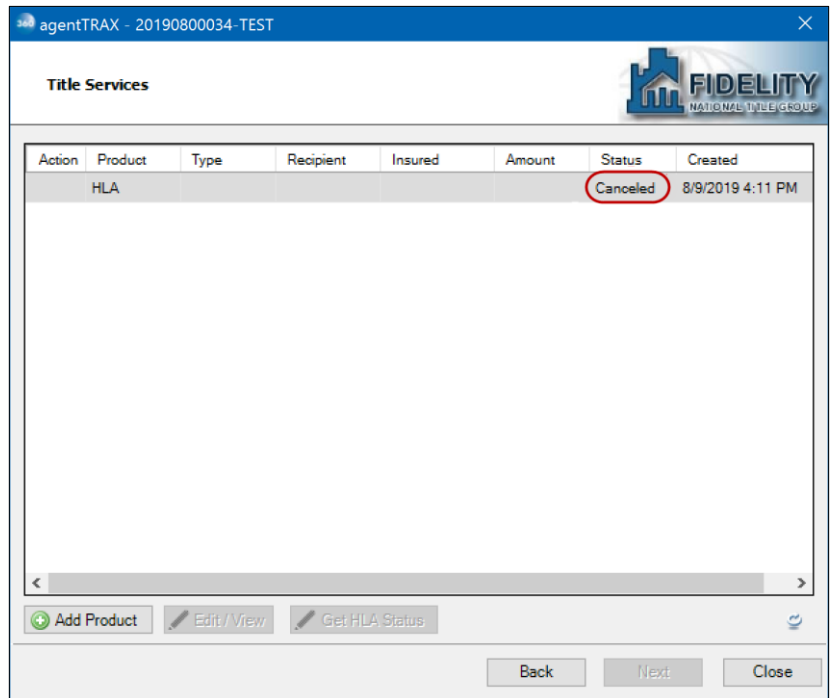


The High Liability Approval window shows the details of your original request.

3. Click the Void button
4. Click OK to confirm you wish to void (cancel) the request



The Void (cancel) request is submitted to agentTRAX and the Status is updated to show Canceled.

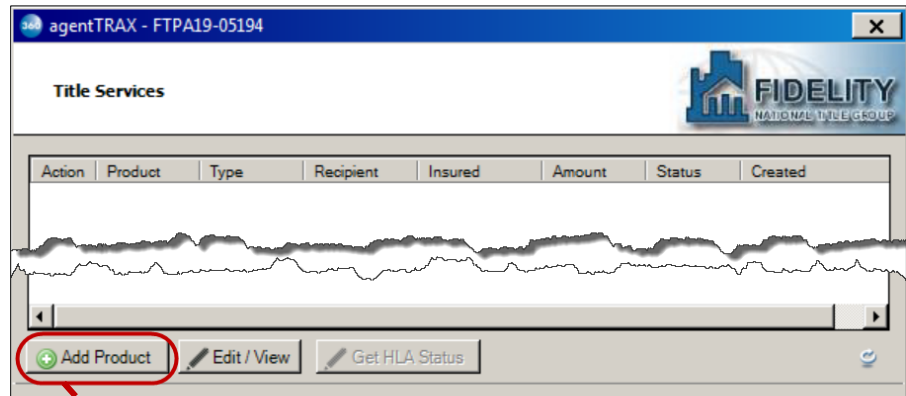


Creating the Policy Jacket(s)

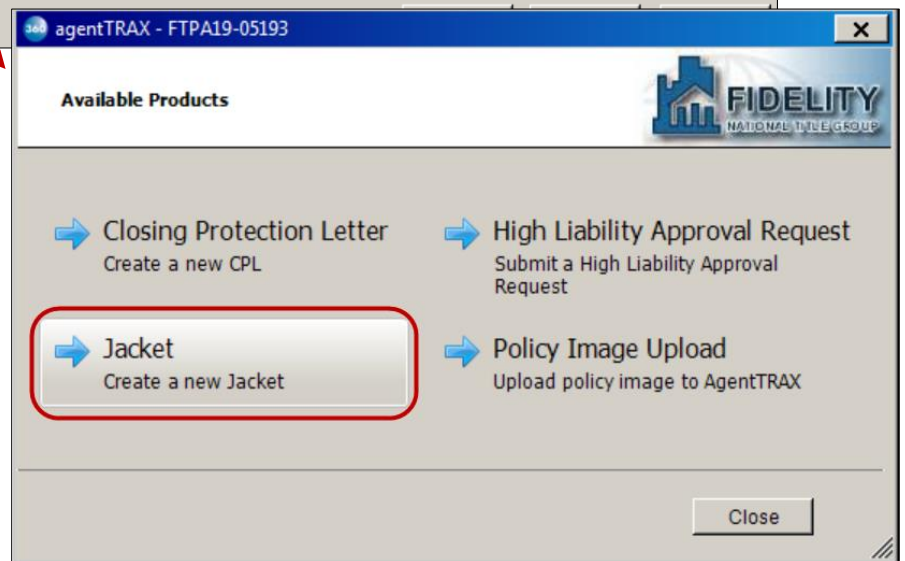
1. Access the Title Services window; refer to **Steps 1-9** (pages 1-4) if needed

From the Title Services window,

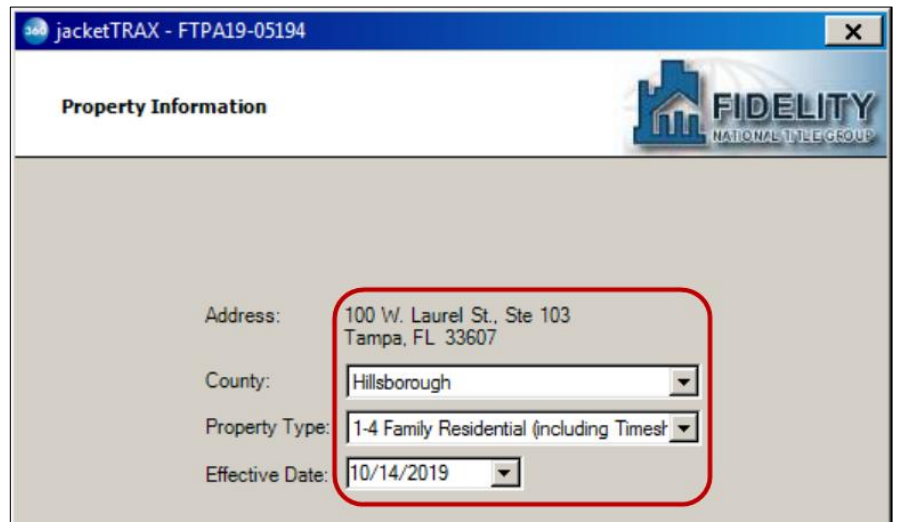
2. Click the Add Product button to open the Available Products window.



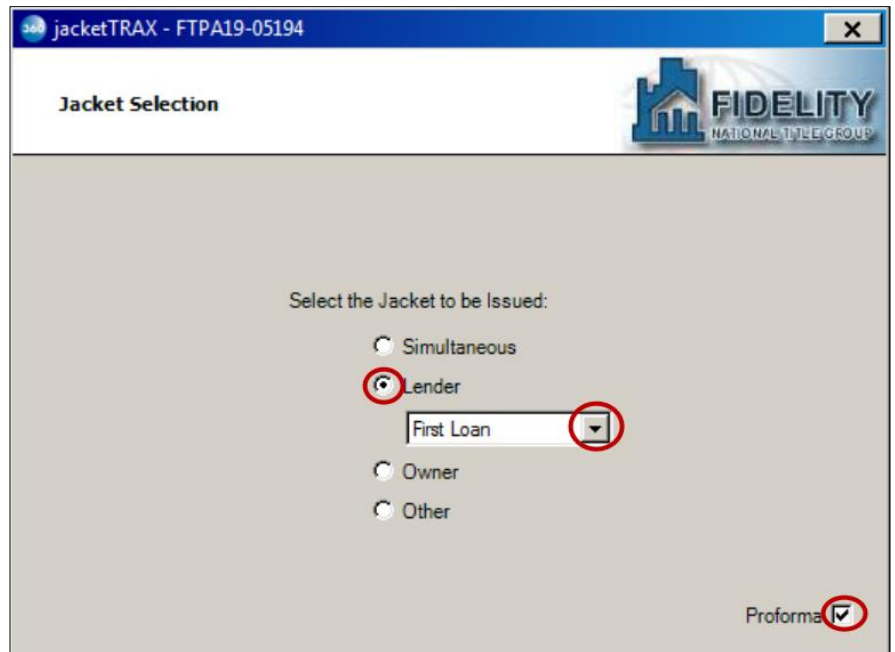
3. Click the Jacket link



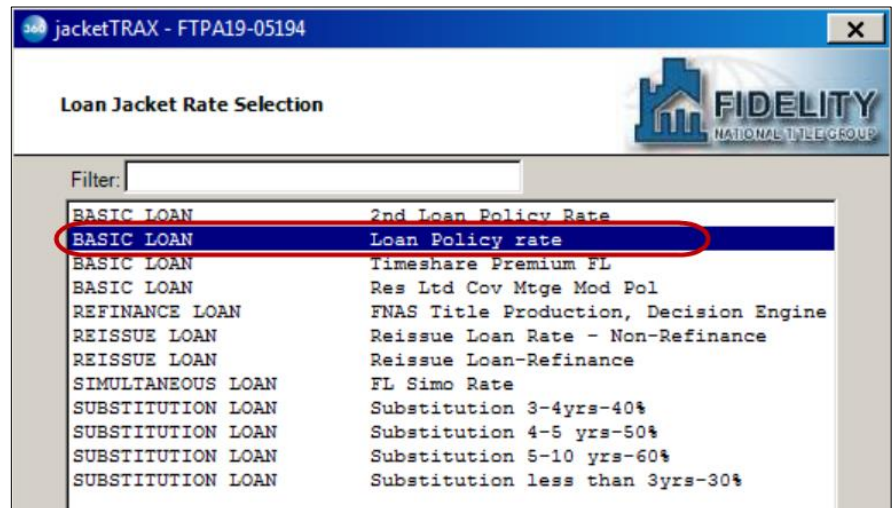
4. From the Property Information window, verify or select the,
 - a) Address
 - b) County
 - c) Property Type
 - d) Effective Date



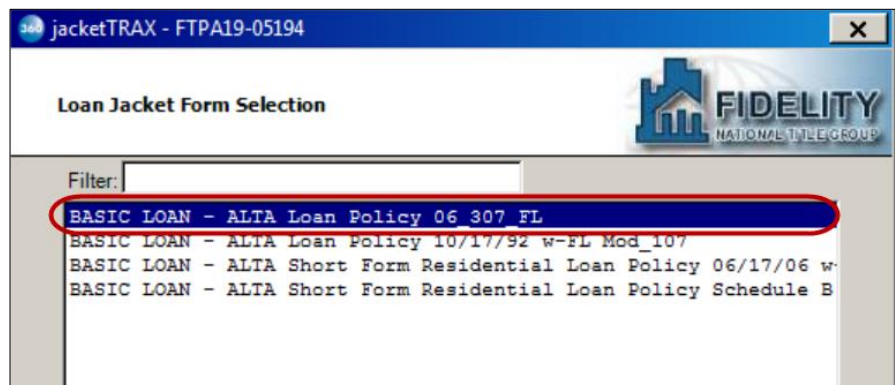
5. Check the radio button for the Jacket to be issued
6. If a Lender policy and multiple loans, select the corresponding loan from the drop-down
7. Check the Proforma check box if applicable
8. Click the Next button



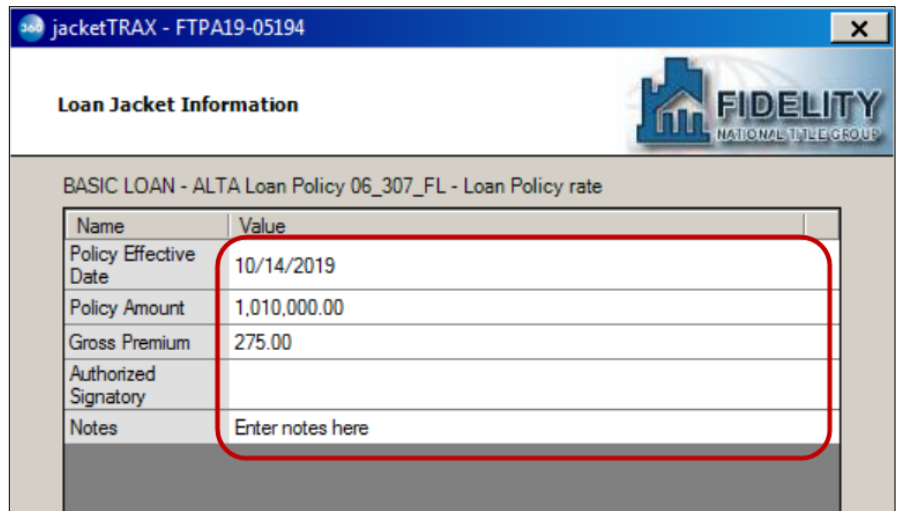
9. From the Loan Jacket Rate Selection window, highlight the applicable rate
10. Click the Next button



11. From the Loan Jacket Form Selection window, select the applicable Jacket Form
12. Click the Next button



13. Verify the Loan Jacket Information



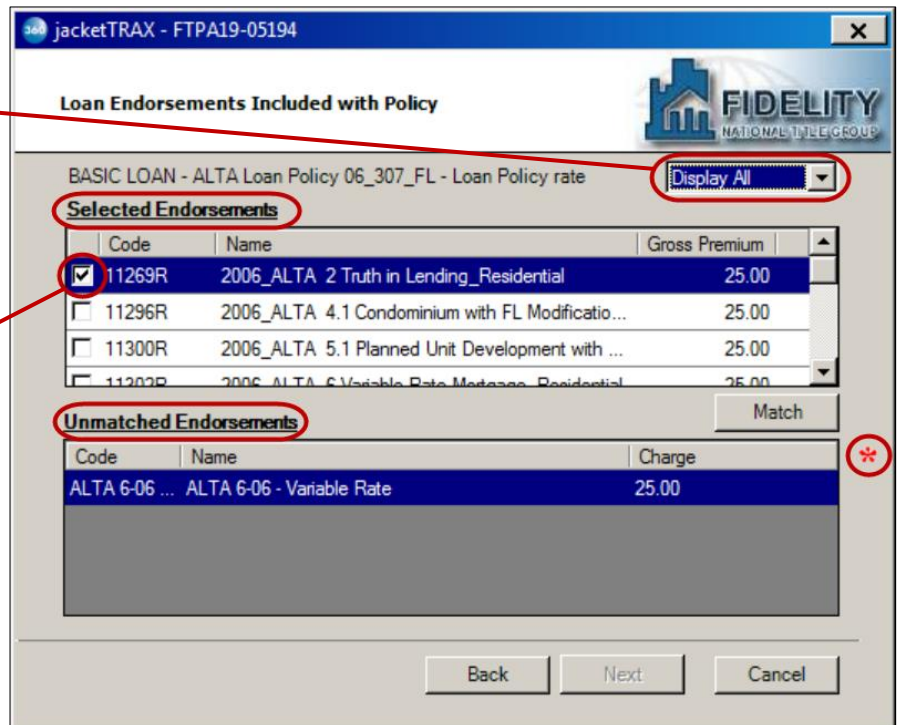
Endorsements: Matched versus Unmatched

The Owners or Loan Endorsements Included with Policy window shows matched and/or unmatched endorsements depending upon your selection.

- > Display All - shows a complete list of endorsements sent from AgentTRAX (matched and unmatched)
- > Display Selected - shows only those endorsements that match the endorsements selected in your ProForm order


Matched endorsements are shown with a checked check box

- > Display Unselected – shows endorsements selected in your order but unmatched to an AgentTRAX endorsement

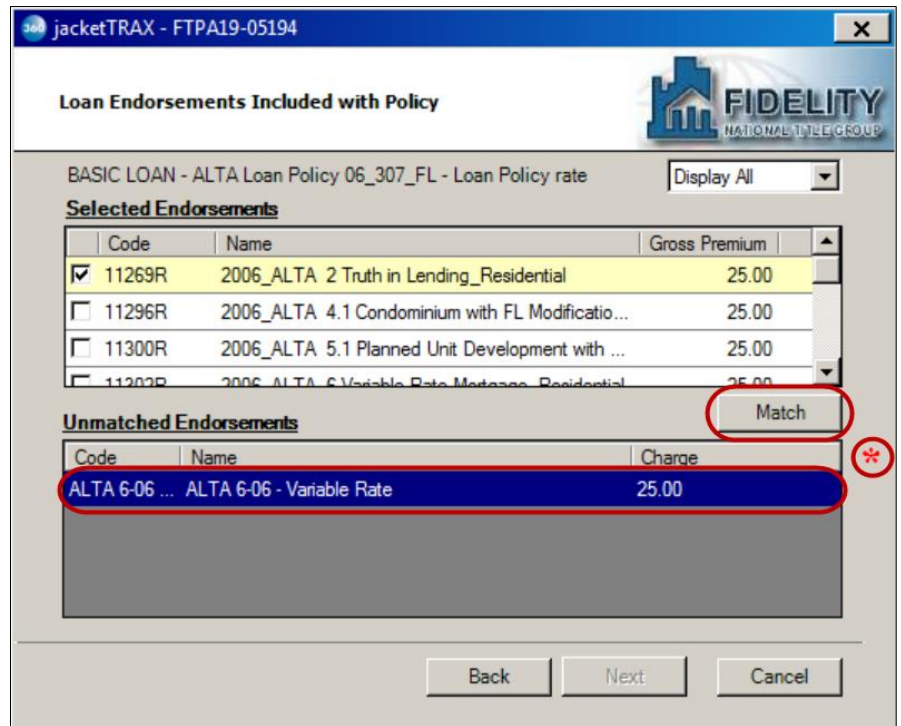


NOTE: You cannot proceed until all Unmatched Endorsements are matched as noted by the **red asterisk**.

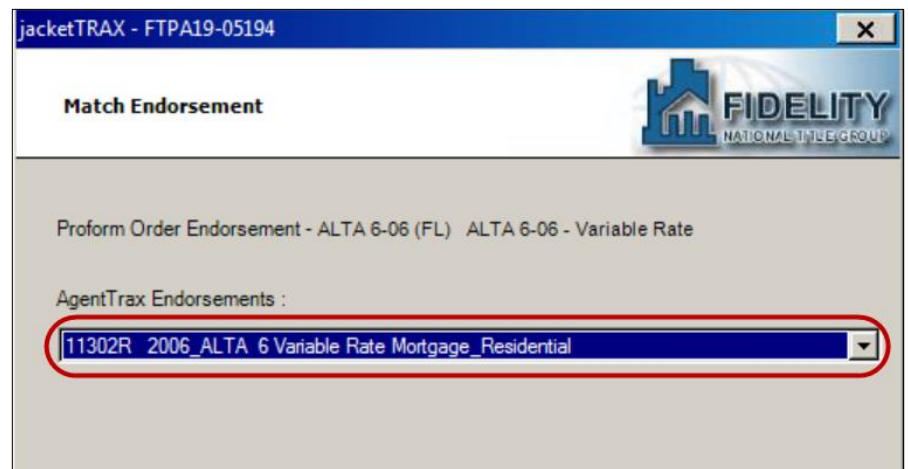
Unmatched Endorsements

If endorsements are shown in the Unmatched Endorsements grid, a red asterisk  is shown indicating an action is required. You **must** manually select (or match) each entry to an AgentTRAX endorsement to continue.

1. Highlight an endorsement in the Unmatched Endorsements grid
2. Click the Match button

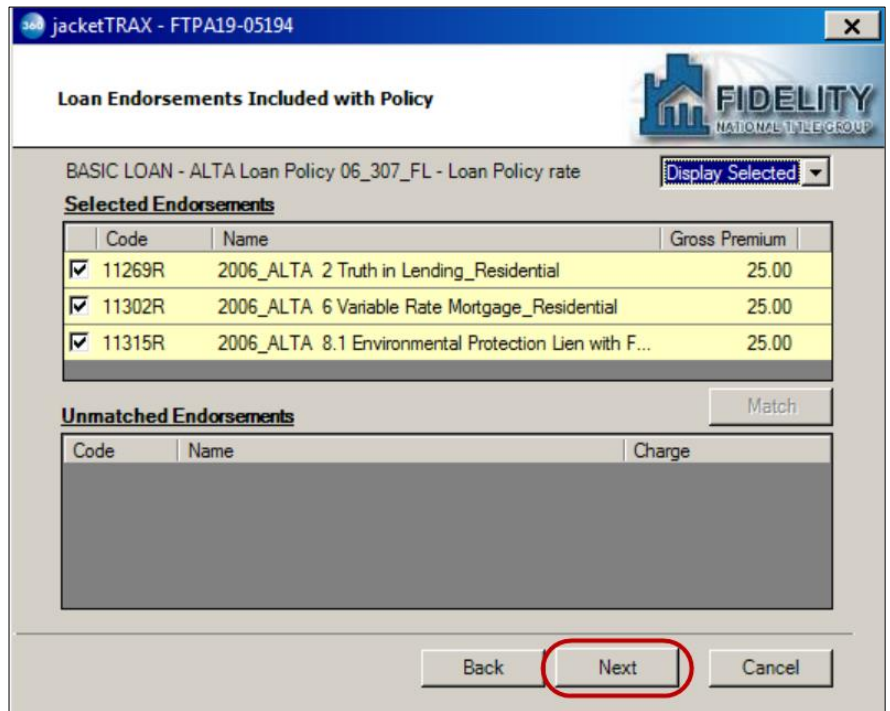


3. From the agentTRAX Endorsements drop-down, select the corresponding endorsement
4. Click the OK button
5. Repeat **Steps 1-4** until all unmatched endorsements are matched

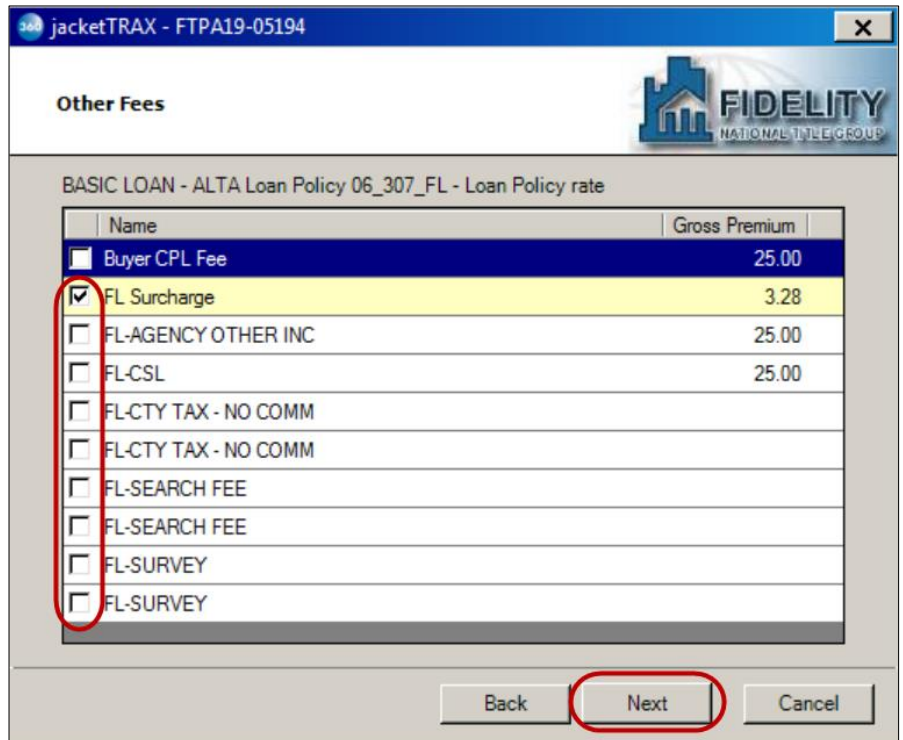


Once no endorsements are shown in the Unmatched Endorsements grid, the Next button becomes active.

6. Click Next to continue



7. If Other Fees are applicable, check the corresponding check box
8. Click the Next button



9. Enter (or verify) Optional Information as needed
10. Click the Submit button

Reviewing the Policy Jacket(s)

The Review window displays,

- > Groups – lists of all Jackets requested
- > Data – shows specific information to the highlighted Jacket
 - » Name = policy type
 - » Current Value = SoftPro order number
 - » New Value = agentTRAX number

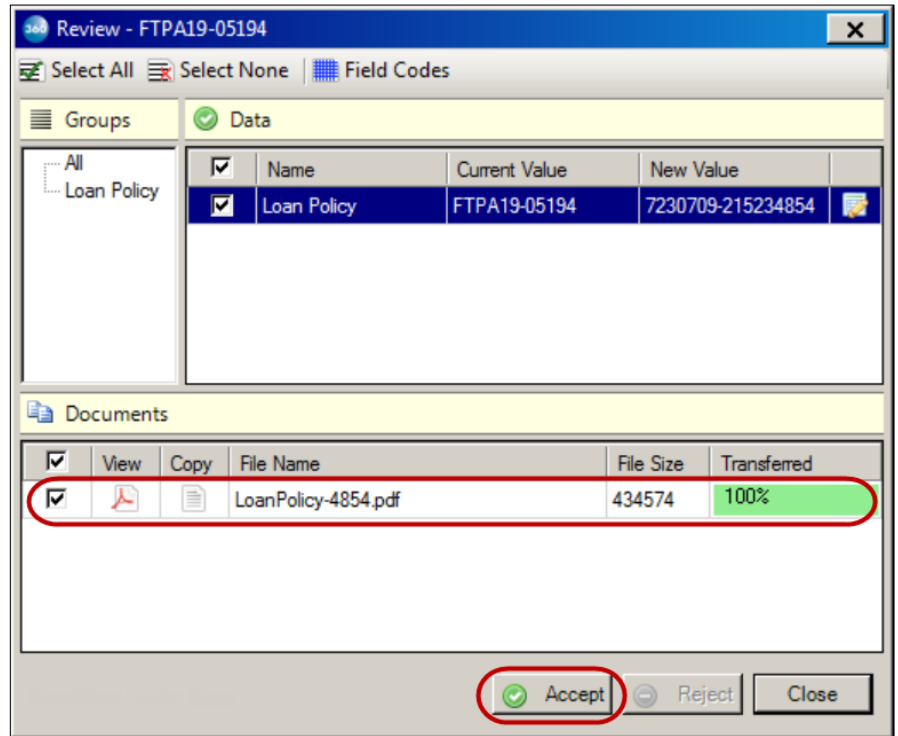
Click the Edit



icon to modify the New Value as needed.

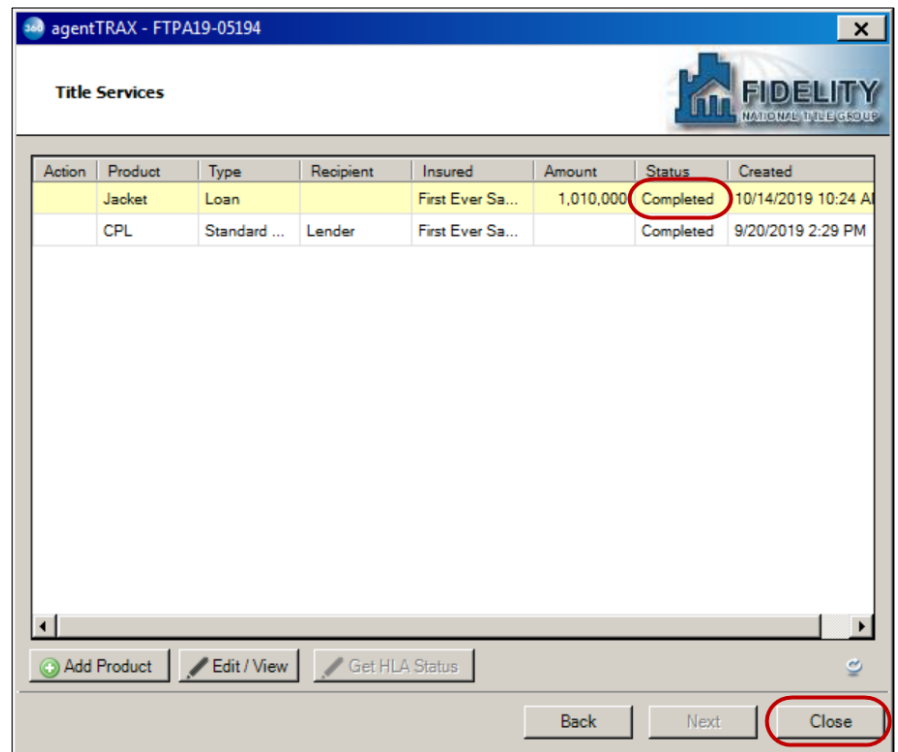
- › Documents – shows the Policy Jacket(s) issued
 - » View – allows you to view the document on screen
 - » Copy – places a copy of the document on your Clipboard allowing you to paste it to another program

11. Click the Accept button



The document is processed and the Title Services window shows the Status as Completed.

12. Click the Close button

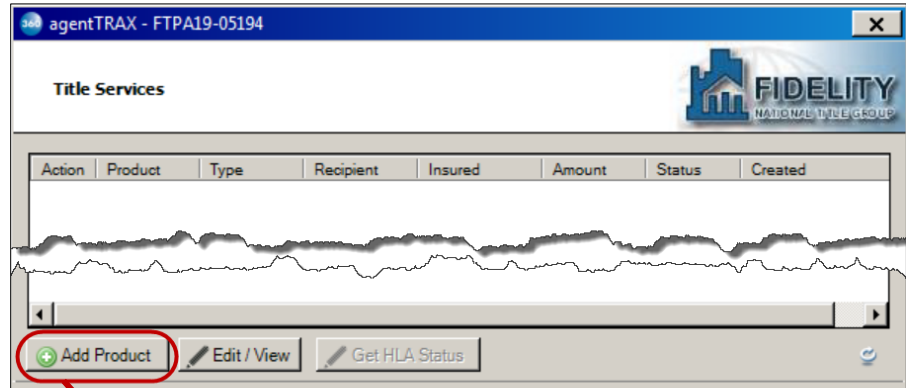


Submitting Final Policy Documents

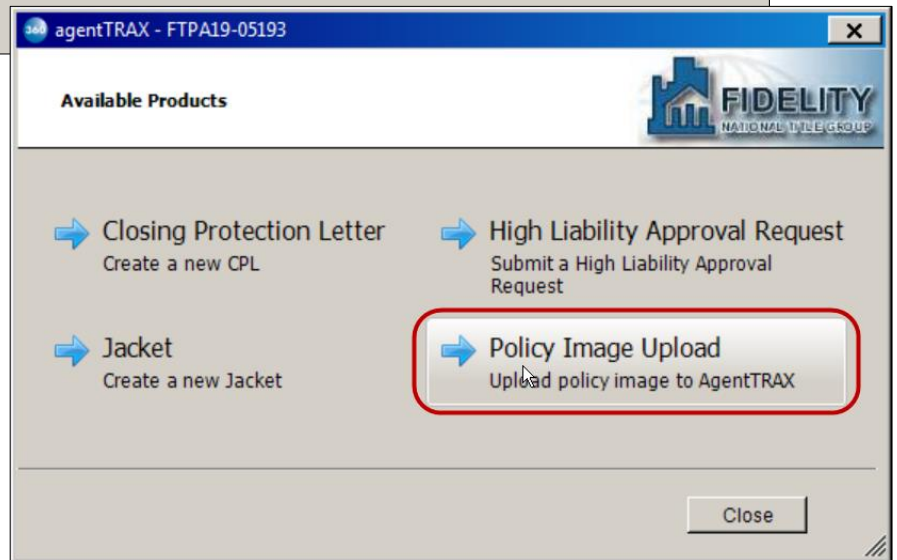
1. Access the Title Services window; refer to **Steps 1-9** (pages 1-4) if needed

From the Title Services window,

2. Click the Add Product button to open the Available Products window.

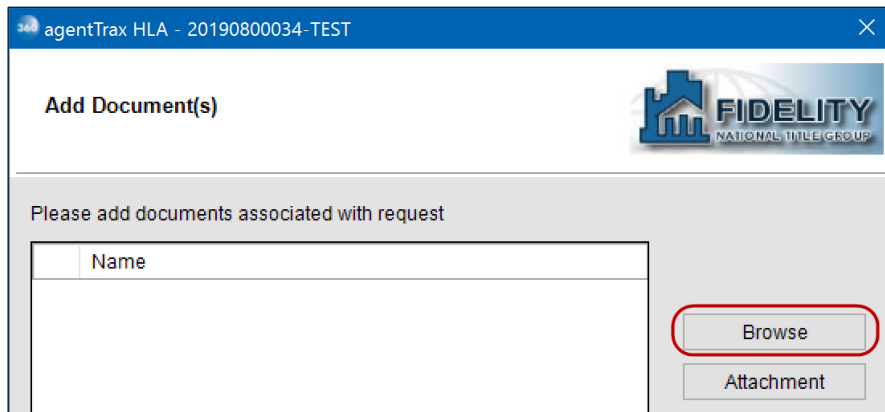


3. Click the Policy Image Upload link

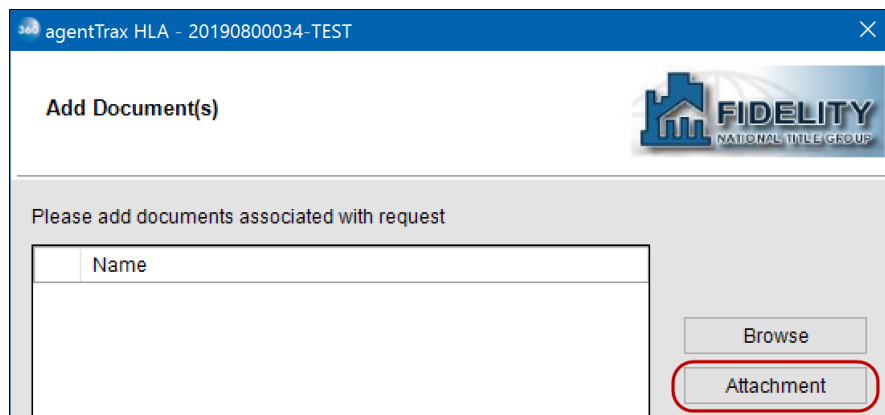


Adding Document(s)

4. Select your document(s)
 - › If from your local drive
 - a. Click the Browse button; this opens the File Explorer window
 - b. Navigate to the folder containing the document(s) to be submitted
 - c. Double-click the document you wish to submit



- › If from your Attachment folder in SoftPro
 - a. Click the Attachment button; this opens the list of attachments in your SoftPro order
 - b. Double-click the document you wish to submit



5. From the Policy drop-down, select the corresponding Policy
6. If needed, use the
 - › Rename button to enter a new document name
 - › Delete button to remove the attachment
7. Repeat **Steps 4-6** until all Policy documents are added
8. Click the Submit button

