

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

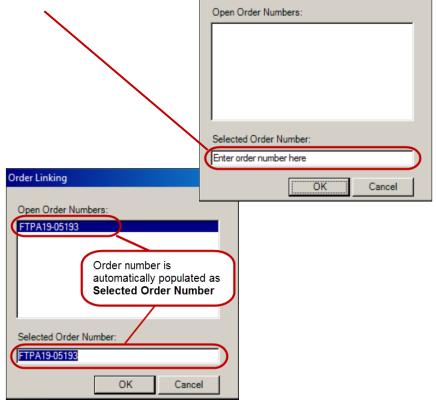
You do not need to have an order open to access agentTRAX.

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
     Open Order

 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

Order Linking	
Open Order Numbers: FTPA19-05193 FTPA19-05194	
First order number is automatically populated as Selected Order Number	
Selected Order Number:	
FTPA19-05193	
OK Cancel	

#### 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.

default setting is to group the	agentTRAX - FTP/			協	
npanies alphabetically by those that	Please select the	company and underwr	iter that you would like to use:		
1	Company	Underwriter	Address	JacketAccess	CPLAccess
> issue the Jacket and the CPL	Foley & Lardner,	LP CTIC	111 N Orange Ave Ste 1800	~	~
/ issue the Jacket and the CPL	Foley & Lardner,	LP CTIC	100 N Tampa St Suite 2700	1	1
	Foley & Lardner,	LP CTIC	111 N Orange Ave Suite 18	1	1
	Foley & Lardner,	LP CTIC	2 S Biscayne Blvd Ste 1900	1	1
	Foley & Lardner,	LP FNTIC	1 Independent Dr Ste 1300	1	1
	Foley & Lardner,	LP FNTIC	111 N Orange Ave Suite 18	1	1
	Foley & Lardner,	LP FNTIC	111 N Orange Ave Ste 1800		1
	Foley & Lardner,	LP FNTIC	100 N Tampa St Ste 2700	1	1
	Foley & Lardner,	LP CLTIC	1 Independent Dr Ste 1300	1	1
	Hill, Ward & Hend	le FNTIC	101 E Kennedy Blvd Ste 37	1	1
	Integrity Title, Inc	FNTLW	1356 N Federal Hwy	1	×
> only issue the CPL	Vacation Title Se	v CTITT	9002 San Marco Ct Bldg 10	~	4
y only issue the ere	Foley & Lardner,	LP CLTIC	100 N Tampa St Ste 2700	×	<ul> <li></li> <li></li> </ul>
> only issue the Jacket	Adams and Rees	LLI CLTIC	150 2nd Ave N Ste 1700	1	X
	Refresh Data			Next	Close



## **User Guide**

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

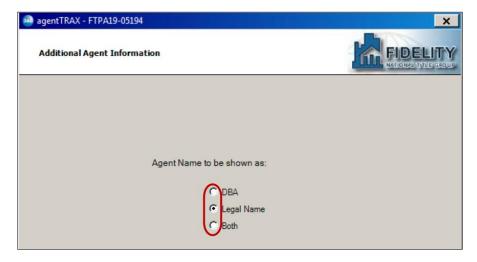
- 1. Click the *title field* to sort
- 2. Click the Refresh Data button to return to the original view

Company	△ Underwriter	Address	JacketAccess	CPLAccess
Adams and Reese LLP	CLTIC	150 2nd Ave N Ste 1700	×	
Adams and Reese LLR	ENTIC	101-E Kennedy Blvd Ste 40	- Vone	<ul> <li>Image: A start of the start of</li></ul>
Hill, Ward & Wendemon, PA	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	Ton - Kennedy Blvd Ste 37		~~~~

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

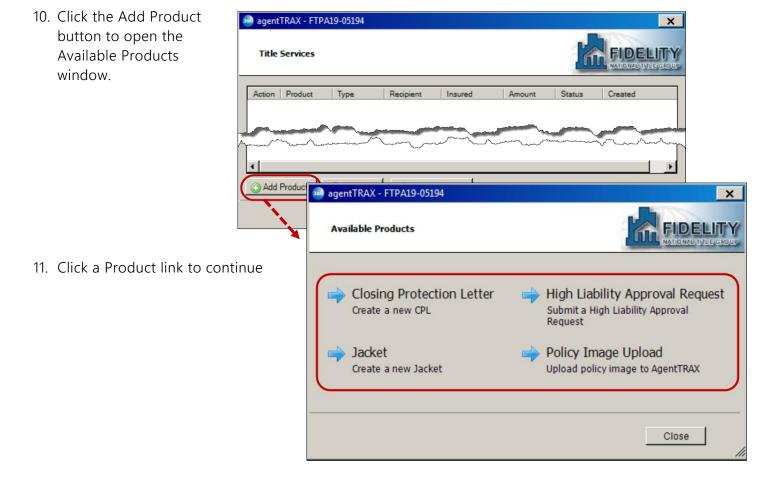
ompany/Underwriter Selec	tion				
lease select the company and Company	underwriter that you Underwriter	would like to use:	JacketAccess	CPLAccess	
	CLTIC	150 2nd Ave N Ste 1700	~	~	Г
	CLTIC FNTIC	150 2nd Ave N Ste 1700 101 E Kennedy Blvd Ste 40	1 1	× ×	
Adams and Reese LLP			× × ×	× × ×	
Adams and Reese LLP Adams and Reese LLP	FNTIC	101 E Kennedy Blvd Ste 40	> > > >	× × ×	
Adams and Reese LLP Adams and Reese LLP Adams and Reese LLP	FNTIC CTIC	101 E Kennedy Blvd Ste 40 101 E Kennedy Blvd Ste 40	> > > >	✓ ✓ ✓ ✓ ✓	

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





From the Title Services window,



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 determiend 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)

🧀 agentTRAX CPL - FTPA19-05194	×
Letter Selection	
Type Covered Buyer Covered	

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

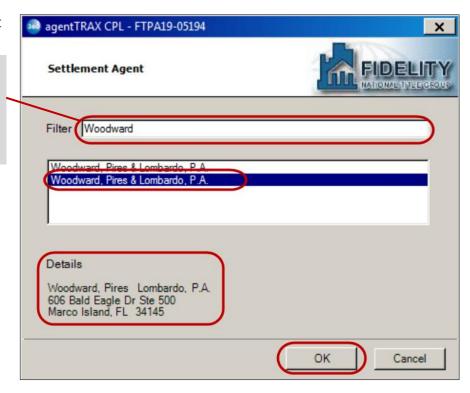
HINT: Use the Filter field if you know the name or part of the name of the Settlement Agent to quickly locate the entry. The list filters as you type.

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

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

6. Click the Next button



🥶 agentTRAX CPL	- FTPA19-05194	×
Letter Selectio	n	
Туре	Standard CPL	V
Covered	I Buyer I Lender Loan 1	
Attorney	<not supported=""></not>	
Settlement Agent:	Woodward, Pires & Lombardo, P.A.	
		Next Cancel



- 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

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

- b) Lender Clause, select from the drop-down, if needed
- c) Click Submit

CPL Information	
File Number	FTPA19-05194
Buyer/Borrower Name	John Smith
Lender Name	First Ever Savings and Loan
Lender Clause	<b>▼</b>
Lender Attention	
Lender Address 1	4800 Dream Home Place
Lender Address 2	
Lender Zip Code	27609
Lender City	Raleigh
Lender State	NC
Loan Number	
Property Additional Data	
Property Street Address	100 W. Laurel St., Ste 103
n	-

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

 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 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.

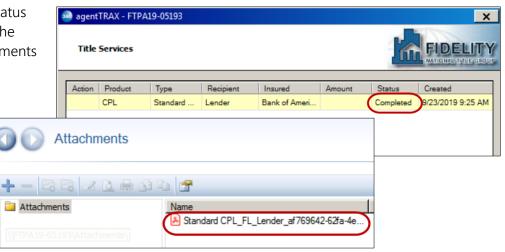
9. Click the Accept button

Review Closing I	FTPA19-05194 Protection Letter(s)		
Documents			
View Copy	File Name	File Size	Transferred
	Standard CPL_FL_Lender_f17d8bd4-0959	77483	100%



## **User Guide**

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

🥹 agentTRAX - F	TPA19-05193						×
Title Services	5						
Action Product	Туре	Recipient	Insured	Amount	Status	Created	
CPL	Standard	Lender	Bank of Ameri	Anount	Completed	9/23/2019 9	:25 AM
		1					
1							
Add Product	/ Edit / View	🖉 Get HL	A Status				్ల
			[	Back	Next		Close



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

**User Guide** 

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#### 8. Click the Action icon × Title Services FIDELITY 9. From the Review window, if multiple CPLs, check the corresponding on Product Туре Recipient Insured Amount Status Created check box for the edited CPL 9/23/2019 9:25 AM CPL Standard Lender Bank of Ameri. Ready agentTRAX CPL - FTPA19-05193 X 10. Click the Accept button Review Closing Protection Letter(s) FIDELIT Documents V View Copy File Name File Size Transferred (¬) Standard CPL\_FL\_Lender\_af769642-62fa-... 100% 77550 Accept Close

The Title Services window shows the Status as Completed.

11. Click the Close button

3	agent	TRAX - FTPA	19-05193						X
	Title	Services							
I	Action	Product	Туре	Recipient	Insured	Amount	Status	Created	
I		CPL	Standard	Lender	Bank of Ameri	(	Completed	9/23/2019 9:2	5 AM
Add Product / Let I / View / Get HLA Status									
1									

#### 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

agentTRAX User Guide

Title Services	FID UNITOUR
	lecipient Insured Amount Status Created ander Bank of Ameri Completed 9/23/201
Add Product Edit / View	Get HLA Status
agentTRAX CPL - FTPA19-05	193
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
Document History	Void Edit C
agentTRAX CPL - FTPA19-05	193
Cancel Letter	FIDE NATORAL

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.		🥺 agentTRAX -	FTPA19-05194	×
	button to open the Available Products window.	Title Service	25	
	window.	Action Product		Amount Status Created
			agentTRAX - FTPA19-05193	Rack Next Class
3.	Click the High Liability App Request link	roval	Available Products	
	Request link		Closing Protection Letter Create a new CPL	High Liability Approval Request Submit a High Liability Approval Request Policy Image Upload
			Create a new Jacket	Upload policy image to AgentTRAX
				Close

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 - F	TPA19-05193				×
High Liability A	pproval Reque	st			
Pulls from SoftPro order Estimated Closin Does this transac Has construction	g Date tion involve con:	Tampa, FL 3 Hillsboroug :: Multi Family			
Is mechanical lie Brief description			No	•	
					×
			C	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 = entercorresponding information (these are required fields)
- c. Policy grid

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- 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

agentTrax HLA - 20190800034-TEST	×
Add Document(s)	
Please add documents associated with request	

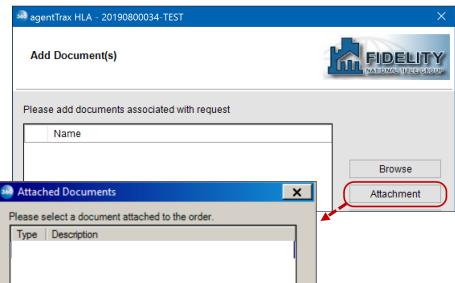
## 🥺 agentTrax HLA - FTPA19-05193

High Liability Approval Order Information

Contact: Susan	Rivera-Stoll
First Name: Susan	Last Name: Rivera-Stoll
Phone Number: (717) 20	9-1320 Email Address: susan.rivera-stoll@softpro
Policy Type	Liability Amount Gross Premium Net Premium
Loan Data from your order	1425500.00 Manually enter Premiums
Premium Details	
	Back Next Cancel



- > 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

SOFTPRO

- Rename button to enter a new document name
- > Delete button to remove the attachement
- 10. Click the Submit button if no changes are needed

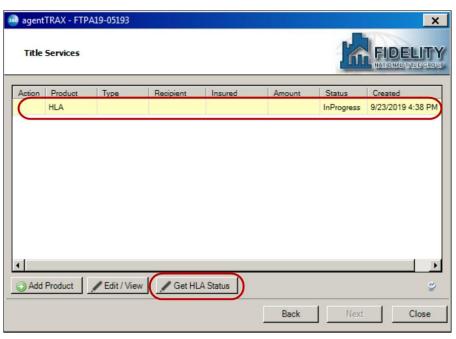
🥶 agentTrax HLA - FTPA19-05193	×
Add Document(s)	
Please add documents associated with request	
Name	
HLA- Sample.pdf	Browse Attachment Rename Delete
Back	Submit Cancel



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

36	agent	rax - 20190	0800034-TEST					×	
	Title	Services							
[	Action	Product	Туре	Recipient	Insured	Amount	Status	Created	
	(	HLA					InProgress	8/9/2019 4:11 PM	
	<							>	
	🕑 Add	Product	/ Edit / View	🖉 🖉 Get HLA	Status			Ű	



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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



Contact: Melissa T First Name: Melissa Phone Number: (919) 555 Policy Type Loan Owner	agentTrax HLA - 20190800034-TEST High Liability Approval Reque Address: County: Property T		
First Name: Melissa Phone Number: (919) 555 Policy Type Loan	Address: County:	agentTrax HLA - 20190800034-TEST	
Phone Number: (919) 555 Policy Type Loan	Address: County:	agentTrax HLA - 20190800034-TEST	
Policy Type Loan	Address: County:		
Loan		Add Document(s)	FIDELI
	Property T		NATIONAL TITLE
Owner			
Premium Details	Estimated Closing Date Does this transaction involve c Has construction commenced Is mechanical lien coverage re Brief description of transactior	Please add documents associated with request           Name	Browse Attachment Rename Delete

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

agent	rax - 2019	0800034-TE	ST				>
Title	Services						
Action	Product	Туре	Recipient	Insured	Amount	Status	Created
	HLA					InProgress	8/9/2019 4:11 PM
<							
< 🖸	Product	/ Edit / View	W Get HL	A Status		_	

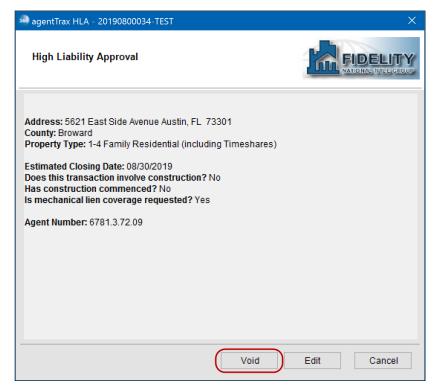


The High Liability Approval window shows the details of your original request.

3. Click the Void button

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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.

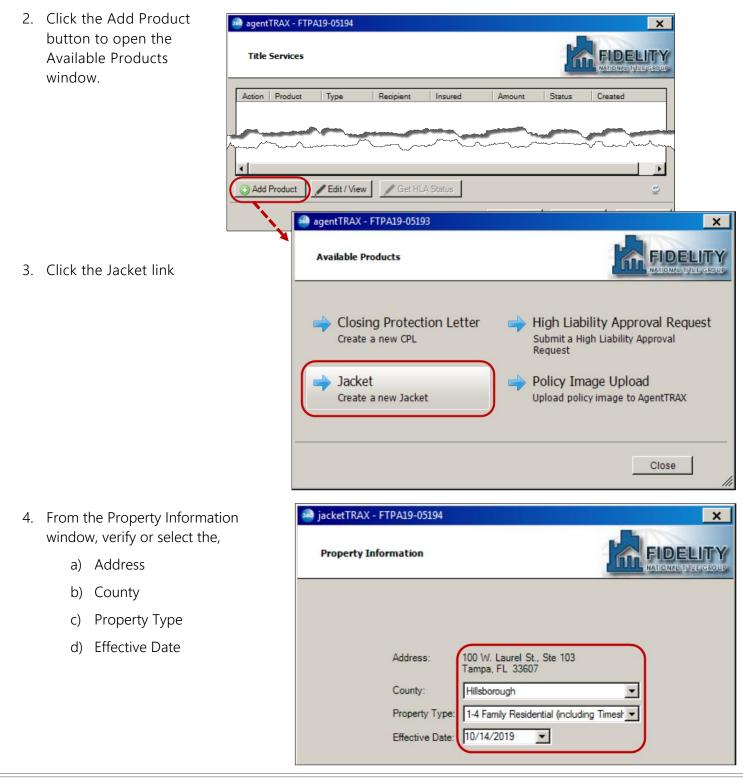
3	agent <sup>-</sup>	TRAX - 201	90800034-TEST						×
	Title	Services							
	Action	Product HLA	Туре	Recipient	Insured	Amount	Status Canceled	Created 8/9/2019 4:	11 PM
	<								>
	Add	Product	🖋 Edit / View	🖉 Get HLA	Status				ల్ల
						Back	Next	(	Close



## **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,

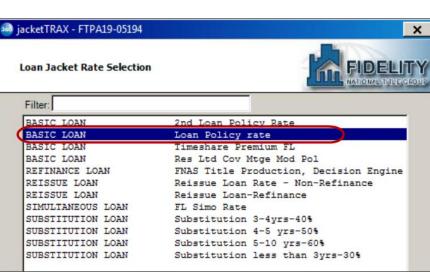




- 5. Check the radio button for the Jacket to be issued
- 6. If a Lender policy and multiple loans, select the corresponding loan from the drop-down
- 7. Check the Proforma check box if applicable
- 8. Click the Next button



- 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





## **User Guide**

13. Verify the Loan Jacket Information

jacketTRAX	- FTP/	A19-05194	×
Loan Jacke	et Info	ormation	
BASIC LOA	N - AL	TA Loan Policy 06_307_FL - Loan Policy rate	
Name		Value	
Policy Effect Date	ctive	10/14/2019	
Policy Amo	unt	1,010,000.00	
Gross Prem	nium	275.00	
Authorized Signatory			
Notes		Enter notes here	

#### **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 🧀 jacketTRAX - FTPA19-05194 > × endorsements sent from AgentTRAX Loan Endorsements Included with Policy (matched and unmatched) Display Selected - shows only those > BASIC LOAN - ALTA Loan Policy 06\_307\_FL - Loan Policy rate endorsements that match the Selected Endorsements endorsements selected in your Code Name Gross Premium 25.00 ProForm order 11269R 2006\_ALTA 2 Truth in Lending\_Residential 11296R 25.00 2006\_ALTA 4.1 Condominium with FL Modificatio ... Matched endorsements are shown 11300R 2006 ALTA 5.1 Planned Unit Development with . 25.00 with a checked check box 112020 2006 ALTA E Variable Pate Mortages 25.00 Match Unmatched Endorsements Display Unselected – shows > Code Name Charge \* endorsements selected in your order ALTA 6-06 ... ALTA 6-06 - Variable Rate 25.00 but unmatched to an AgentTRAX endorsement NOTE: You cannot proceed until all Unmatched Endorsements are matched Back Cancel 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

oan Endorse	ments Included with Policy		
BASIC LOAN - Selected End	ALTA Loan Policy 06_307_FL - Loan Policy rate lorsements	Display All	-
Code	Name	Gross Premium	-
▼ 11269R	2006_ALTA 2 Truth in Lending_Residential	25.00	
11296R	2006_ALTA 4.1 Condominium with FL Modificatio.	25.00	
11300R	2006_ALTA 5.1 Planned Unit Development with	. 25.00	
11202P	2006 ALTA E Variable Rate Motoaco Residentia	1 25.00	
Inmatched E	ndorsements	Matcl	h
Code	Name	Charge	
ALTA 6-06	ALTA 6-06 - Variable Rate	25.00	

- 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

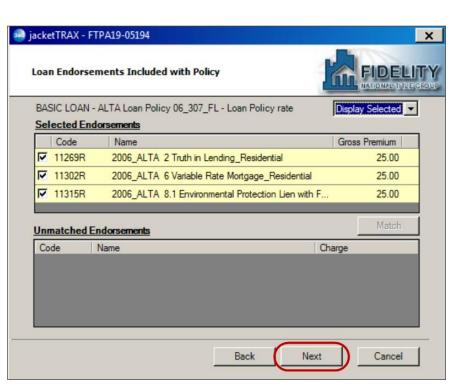


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Once no endorsements are shown in the Unmatched Endorsements grid, the Next button becomes active.

6. Click Next to continue

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



🥹 jack	etTRAX - FTPA19-05194	×
Oth	er Fees	
BAS	SIC LOAN - ALTA Loan Policy 06_307_FL - Loan Policy rate	
	Name	Gross Premium
	Buyer CPL Fee	25.00
	FL Surcharge	3.28
	FL-AGENCY OTHER INC	25.00
	FL-CSL	25.00
	FL-CTY TAX - NO COMM	
	FL-CTY TAX - NO COMM	
	FL-SEARCH FEE	
	FL-SEARCH FEE	
	FL-SURVEY	
	FL-SURVEY	-
	Back	Next Cancel



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

🥺 jacketTRAX - FTPA19-05194	x
Optional Information	
Check Amount: Check Number: Policy Gross Premium Endorsement Gross Premium Other Fees Gross Premium Other Fees Gross Premium \$ 03.28 Total Gross Amount: \$ 353.28	
	Back Submit Cancel

#### 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

	🛃 Select All 📑	Select N	one Field Codes	5		
rmation to	Groups	💿 Dat	ta			
	All	N	Name	Current Value	New Value	
be	i Loan Policy		Loan Policy	FTPA19-05194	7230709-215234854	
oftPro					, k	
Edit New Value : Lo	an Policy					x
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7230709-215234854	)					*

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modify the New Value as needed.

х

**User Guide** 



- 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

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🧟 Select All 📑 Select None 🛛 🎆 Field Codes									
Groups	🕑 Da	Data							
Al	<b>V</b>	Name	Current Value	New Va	alue				
Loan Policy		Loan Policy	FTPA19-05194	723070	9-215234854	7			
Documents									
View C	opy F	ile Name		File Size	Transferred				
	E La	anPolicy-4854.pdf		434574	100%				
			O Accept	Rei	ect Clos				
			Accept			~			

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

12. Click the Close button

🥯 agent	TRAX - FTP	A19-05194						×
Title	Services							
Action	Product	Туре	Recipient	Insured	Amount	Status	Created	
	Jacket	Loan		First Ever Sa	1,010,000	Completed	10/14/2019 10:2	24 AI
	CPL	Standard	Lender	First Ever Sa		Completed	9/20/2019 2:29	РМ
			1					
O Add	Product	🖉 Edit / View	🖉 Get Hl	A Status				<u>ల</u>
				[	Back	Next	Clos	e



## **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	🥮 agentTRAX - FTF	PA19-05194			×
	button to open the Available Products window.	Title Services				
	window.	Action Product	Type Recipient I	Insured Amount	Status Cre	eated
			agentTRAX - FTPA19-05193			×
3.	Click the Policy Image Uplo	ad link	Available Products			
			Closing Protectio	_	Submit a High Li Request	
		_	Create a new Jacket	-	Policy Image	Upload age to AgentTRAX
						Close



### 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
    - 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

🔊 agentTrax HLA - 20190800034-TEST	X
Add Document(s)	
Please add documents associated with request	
	Browse Attachment

agentTrax HLA - 2019080003	4-TEST	
Add Document(s)		
Please add documents assoc	iated with request	
Name		
		Browse
agentTrax Submit Final Polic	y - FTPA19-05194	×
Add Document(s)		
Please add documents and a	ssociate a policy	
Name	Policy	
📙 X17004851 - Policy w H	yper(Loan (7230709-215234	Browse Attachment Rename
		Delete