



## Clear2Go Service Order – Process in AtClose

Clear2Go reports can be requested for your AtClose file via automation when the AtClose order is created, or manually by adding a Clear2Go assignment to an existing AtClose order. For best results, please make sure the following fields are completed: Borrower's full name and SSN, property address, APN, lender name, and loan amount.

### Manual Clear2Go Requests

1. Access your order by searching for its number at the top of the AtClose window

The screenshot shows the top of the AtClose window with a search bar. The search bar has two tabs: 'Order#' and 'Loan#'. The 'Order#' tab is selected, and the text 'fatic-17' is entered in the search field. A magnifying glass icon is to the right of the search field, and a blue circular button with a question mark and a dropdown arrow is to the right of the magnifying glass.

2. Select the **Transactions** tab

The screenshot shows the AtClose interface with the header 'ORDER > VIEW : FATIC-17 (In Progress), Lori smith, Test FATIC Client'. Below the header are four tabs: 'Details', 'Contact', 'Transactions', and 'Shared'. The 'Transactions' tab is highlighted with a red box.

3. Scroll down to the **Products** section and select the commitment transaction's record row

Products			
Product Category	Product	Bundle	Service Center
Title	Title Commitment - Refinance		First American Title Insurance Company

4. Select **Vendor Assignments**

The screenshot shows the AtClose interface with the header 'ORDER PRODUCT > VIEW : Title Commitment - Refinance (Order: FATIC-17 )'. Below the header are four tabs: 'Details', 'Vendor Assignments', 'Product Delivery', and 'Shared'. The 'Vendor Assignments' tab is highlighted with a red box.

5. Select **Add New Assignment**

The screenshot shows the AtClose interface with the 'Add New Assignment' button highlighted with a red box. The button is located at the bottom right of the form, next to an 'Actions' button. Above the button are fields for 'Office Phone' and 'Home Phone', each with a text input field and an 'Ext' field.

6. Select **Nationwide – Clear2Go** in the **Vendor Product** field

The screenshot shows the AtClose interface with the 'Vendor Product' dropdown menu open. The dropdown menu is located below the 'Add New Assignment' button. The menu items are: 'Nationwide - 1 Owner Search - Commitment', 'Nationwide - Clear2Go', 'Nationwide - Deed Prep', 'Nationwide - Deed Prep rush', and 'Nationwide - Document Copies'. The 'Nationwide - Clear2Go' option is highlighted with a blue background.

7. Click **Save** to place your order**NOTE:** The manual Clear2Go assignment will display in the list indicating your order is placed.

Vendor Assignments							
<input type="checkbox"/> Show Inactive Assignment(s)							
Vendor #	Vendor Name	Product	Borrower	Assigned Date	Due Date	Status	
		1 Owner Search - Commitment				Unassigned	
125	First American Title insurance Company	Clear2Go		08/04/2023 13:15:29	08/04/2023 13:15:29	Assigned	

## Clear2Go Request Automation

Clear2Go request automation requires setup support from AtClose. If your automation is set up, after you enter an order in AtClose, you can verify that a Clear2Go report has been requested:

## 1. Access your order by searching for its number at the top of the AtClose window

Order#

Loan#

fatic-17

2. Select the **Shared** tab

ORDER > VIEW : FATIC-17 (In Progress), Lori smith, Test FATIC Client

Details

Contact

Transactions

Shared

3. Review the Clear2Go automated order information on the **Notes** page

ORDER > VIEW : FATIC-17 (In Progress), Lori smith, Test FATIC Client

Details

Contact

Transactions

Shared

Notes

Attachments

Issues

Send Event

Link Orders

Merge Orders

Search Criteria

☐ Show Inactive Notes

Category	Note Type	Note	Entered By	Date	
User	Clear2Go Note	aws-ip Integration, placed an order from AgentNet on 08/04/2023 10:15:33 AM PST. Agent's contact info is: testingagent@gmail.com or +17146978273. AgentNet	Workflow	08/04/2023 13:15:37	

**NOTE:** If you don't see a note for an automatic Clear2Go order after your AtClose order is created, then your automation is not set up yet. Contact AtClose support for details.

## Update an Order

Updates are not available for the automated Clear2Go Report. If your file information changes, or the report expires, please order a second Clear2Go report on the same file.