



## 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 AtClose search interface. There are two input fields labeled 'Order#' and 'Loan#'. The search field contains the text 'fatic-17'. To the right of the search field is a magnifying glass icon, a document icon, and a dropdown menu with a question mark.

2. Select the **Transactions** tab

The screenshot shows the order view for 'ORDER > VIEW : FATIC-17 (In Progress), Lori smith, Test FATIC Client'. There 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

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

4. Select **Vendor Assignments**

The screenshot shows the order view for 'ORDER PRODUCT > VIEW : Title Commitment - Refinance (Order: FATIC-17 )'. There 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 'Add New Assignment' form. It has fields for 'Office Phone' and 'Home Phone', each with a main input field and an 'Ext' field. At the bottom right, there is a red-bordered button labeled 'Add New Assignment' and a blue 'Actions' button.

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

The screenshot shows the 'Assignment Information' form. The '\* Vendor Product' dropdown menu is open, showing several options. 'Nationwide - Clear2Go' is highlighted in blue. Other options include 'Nationwide - 1 Owner Search - Commitment', 'Nationwide - Deed Prep', 'Nationwide - Deed Prep rush', and 'Nationwide - Document Copies'.



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

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 |  |

[More](#)

**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.