





Closing Protection Letters – Process in Closers' Choice

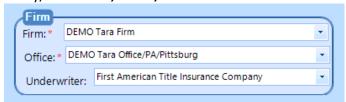
Learn how to generate, edit, view and void a Standard Closing Protection Letter from your Closers Choice file using the AgentNet® Integration.

Generate CPL



NOTE: The CPLs option is selected by default.

- 2. In the Services Gateway CPL & Jackets window:
- 3. Verify/select Firm, Office, and Underwriter



NOTE: **Firm** section (**Office** and **Underwriter**) might be disabled (greyed out) if you have previously ordered another product, such as a Title Search, for the same File.

- 4. Verify/select Firm Signatories:, if preferred
- 5. Select Covered Parties:
- 6. Verify/select Letter Type

NOTE: You can generate a **Blanket Letter Type** if permitted in your state.

7. Verify/select Lender Party

NOTES:

- Lender defaults to the Lender on File you entered into Closers Choice
- You can click Lenders to select a Lender from your AgentNet saved Lender Party list

 Or -
- You can click Use CPL Address
- 8. Verify/select Closing Date
- 9. Verify/enter Loan Number
- 10. Select appropriate option to search and add Additional Parties, if applicable



NOTE: States that require the use of an Approved Attorney see their default Attorney.

Get CPL

NOTE: The **Order** confirmation is displayed in the **Orders** section. **CPL** document is displayed in the **Documents** section of the Services Gateway – CPLs & Jackets screen.

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Optional Edit a CPL

To edit a CPL after it has been generated follow these steps:

- 1. Make the appropriate selections or changes to the order form in the Services Gateway CPLs & Jackets screen as needed NOTE: If you have just ordered a CPL, your selections on the order form will be retained. If you have ordered a subsequent CPL, the last CPL's selections will be on the order form. If you have left the integration ordering window, and returned, the order form will be reset to the defaults.
- 2. In the Orders section of the screen, click in next to the applicable CPL to update that CPL with the selections currently displayed on the order form

NOTE: The CPL document is voided; a new CPL is generated and displays a new Order Number and new Document. The new document is also automatically available in your Saved Documents in your file in Closers' Choice. The voided CPL will be removed from your Saved Documents in your file in Closers' Choice.

View a CPL

- 1. Select the document to view
- 2. Click to see the CPL document on screen

NOTES:

- All CPLs generated are also accessible from the Closers Choice main screen in the Documents section
- Remember to Void any duplicate CPLs in your files to avoid remittance issues if there are 2 open CPLs for the same file

Void a CPL

To void a CPL in Closers' Choice and AgentNet after it has been generated, follow these steps:

- 1. In the Orders section of the Services Gateway CPLs&Jackets screen, highlight the applicable CPL
- 2. Click Void
- 3. Click OK in the confirmation window

