



Closing Protection Letter – Process in Settlor

Learn how to generate a Closing Protection Letter (CPL) using the AgentNet® Integration.

Request CPL

After a title commitment is created, to generate the closing protection letter document in your Settlor file:

1. Click the file number on the Settlor dashboard
2. Click **Documents**

The screenshot shows the Settlor dashboard for 'Danielle's Dashboard' with file number '8000026'. A red circle labeled '1' points to the 'Admin' dropdown menu. A second red circle labeled '2' points to the 'Documents' option within the 'Admin' dropdown menu. The dashboard also displays a 'Virtual Standup' section with a 'New Sticky Note' button and a 'Notes' section with 'Seller Scheduling', 'Buyer Scheduling', 'Requirements', and 'Processing Steps'.

3. Click **Closing Protection Letter**

The screenshot shows the 'Documents' page for file '4567 FIRST AMERICAN TEST FILE DRIVE, Reno, NV 89523 (SU8000029)'. The page includes a 'Custom Packages' section with a '+ Add Document(s)' button and a 'Standard Packages' section with buttons for 'ESignature', 'RON', 'Cover Sheets', 'Document Options', 'Delete', 'Publish', and 'Add to Package'. The 'Closing Protection Letter' button is highlighted with a red box.

NOTE: The CPL Request window displays information pulled in from the file. Required fields are red.



4. Select the corresponding **Loan ID** for the CPL

NOTE: The loan number, address, and covered parties are pulled into the request from the file; these are editable if needed.

5. Click the red **X** icons to remove unneeded CPLs from the request

6. Select the type of **Underwriter CPL Form**

7. Edit address information if needed

8. Click **Save Changes**

CPL Request

Underwriter:

First American Title Insurance Company

Loan ID:

123456789 - Wells Fargo

Loan number:

123456789

Covered Parties

Covered Person

Bob Buyer (Buyer/Borrower)

Alternate Name

If applicable

+ New Row

Covered Person

Wells Fargo (Lender - New Loan - Primary)

Alternate Name

If applicable

+ New Row

Underwriter CPL ID:

The unique ID given to this CPL by the underwriter (if applicable)

Addressee:

Wells Fargo (Lender - New Loan - Primary)

Underwriter CPL Form:

Standard (Lender - New Loan)

Addressee Alternate Name:

WELLS FARGO

Attention:

The attention line to use during delivery.

☐ Is International

Address:

1234 Wells Fargo Way

Address 2:

Apartment, suite, unit, building, floor, etc... If entering a foreign address, use multiple lines

Zip:

80111

City:

Englewood

State:

CO - Colorado

Close

Save Changes

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NOTE: The document is created in the Settlor file and in AgentNet. In Settlor, the CPL displays in the **Documents** list under **Processing Documents**.

Documents 4567 FIRST AMERICAN TEST FILE DRIVE, Reno, NV 89523 (SU8000029)

+ Add Document(s) ✓ Upload a Document Pretype Closing Protection Letter Deliver Selected Print Selected

ESignature RON Cover Sheets Document Options Delete Publish Add to Package

View Deleted Documents

☐ Documents

☐ Settlement Statements and HUDS

☐ Buyer Settlement Statement created Last Wednesday (06/28) by System + Add Comments
Sort from Document is (40, 999, 0)

☐ Seller Settlement Statement created Last Wednesday (06/28) by System + Add Comments
Sort from Document is (40, 999, 0)

☐ Processing Documents

☐ Insured Closing Letters uploaded Today (07/03) by Danielle Bonneau
Borrower(s) / Buyer(s)
Sort from Document Type is (120, 999, 0)

☐ Insured Closing Letters uploaded Today (07/03) by Danielle Bonneau
Lender
Sort from Document Type is (120, 999, 0)

9. Click its hyperlink to preview the CPL.

Settlor Danielle's Dashboard 8000029 Admin Apps Queues Accounting EA A/R Financial HOA Disbursing

Documents 4567 FIRST AMERICAN TEST FILE DRIVE, Reno, NV 89523 (SU8000029)

Insured Closing Letters

Insured Closing Letters Download

1 of 6 Automatic Zoom

First American Title™

**CLOSING PROTECTION LETTER
SINGLE TRANSACTION
First American Title Insurance Company**

"Addressee": Bob Buyer
12345 main
Denver, CO 80210

"Date": 7/3/2023

"Issuing Agent" or "Approved Attorney," as the case may require:
Security 1st Title of Nevada, LLC
9500 Hillwood Drive, Ste. 110
Las Vegas, NV 89134

"Real Estate Transaction":
Bob Buyer
4567 FIRST AMERICAN TEST FILE DRIVE
RENO, NV 89523

Closing Date: 8/28/2023
Loan #: 123456789
File #: SU8000029

Re: Closing Protection Letter

Dear Sir or Madame:

In consideration of Your acceptance of this letter, First American Title Insurance Company (the "Company"), agrees to indemnify You for actual loss of Funds incurred by You in connection with the closing of the Real Estate Transaction conducted by the Issuing Agent or Approved Attorney on or after the Date of this letter, subject to the Requirements and Conditions and Exclusions set forth below:



Edit CPL

1. Click the icon to the right of the CPL in the **Processing Documents** list

☐ **Processing Documents**

☐ **Insured Closing Letters** uploaded Today (07/03) by Danielle Bonneau

Borrower(s) / Buyer(s)

Sort from Document Type is (120, 999, 0)

☐ **Insured Closing Letters** uploaded Today (07/03) by Danielle Bonneau

Lender

Sort from Document Type is (120, 999, 0)

2. Edit CPL information
3. Click **Save Changes**

CPL Request

Underwriter:
First American Title Insurance Company

Loan ID:
123456789 - Wells Fargo

Loan number:
123456789

Covered Parties

Covered Person	Alternate Name	
Bob Buyer (Buyer/Borrower)	If applicable	
Wells Fargo (Lender - New Loan - Prime)	If applicable	

New Row

Underwriter CPL ID:
24643882

Cancel Reason:
Reason that this CPL is being cancelled

Addressee:
8304

Underwriter CPL Form:
Standard (Lender - New Loan)

Addressee Alternate Name:
WELLS FARGO

Attention:
The attention line to use during delivery.

☐ **Is International**

Address:
1234 Wells Fargo Way

Address 2:
Apartment, suite, unit, building, floor, etc... If entering a foreign address, use multiple lines

Zip: 80111 **City:** Englewood **State:** CO - Colorado

NOTE: The original CPL is voided, and the updated CPL replaces it. Preview the CPL to confirm changes.

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Void CPL

1. Click  beside the CPL in the **Processing Documents** list
2. Click 
3. Enter the **Cancel Reason**
4. Click **OK**

CPL Request

Underwriter: First American Title Insurance Company

Addressee: 8304

Loan ID: 123456789 - Wells Fargo

Underwriter CPL Form: Standard (Lender - New Loan)

Loan number: 123456789

Addressee Alternate Name: WELLS FARGO

Covered Parties

Covered Person	Alternate Name
Bob Buyer (Buyer/Borrower)	If applicable
Wells Fargo (Lender - New Loan - Primary)	If applicable

[+ New Row](#)

Underwriter CPL ID: 24643881

Zip: 80111 **City:** Englewood **State:** CO - Colorado

Cancel Reason: Reason that this CPL is being cancelled

Attention: The attention line to use during delivery.

Apartment, suite, unit, building, floor, etc... If entering a foreign address, use multiple lines

[Delete](#) [Close](#) [Save Changes](#)

Are you sure you wish to delete this record?

[Cancel](#) [OK](#)

NOTE: The CPL is voided through AgentNet. Click the **View Deleted Documents** link to access it in Settlor.

Settlor Danielle's Dashboard 8000029 Admin Apps Queues Accounting EA A/R Financial HOA Disbursing Search

Documents 4567 FIRST AMERICAN TEST FILE DRIVE, Reno, NV 89523 (SU8000029)

[+ Add Document\(s\)](#) [Upload a Document](#) [Pretype](#) [Closing Protection Letter](#) [Deliver Selected](#) [Print Selected](#)

[ESignature](#) [RON](#) [Cover Sheets](#) [Document Options](#) [Delete](#) [Publish](#) [Add to Package](#)

[View Deleted Documents](#)

☐ Documents