



eRemittance in SnapClose

The purpose of this document is to provide detailed instructions on how to electronically remit policy premiums to First American using the SnapClose integration with AgentNet®.

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Prerequisites

The following requirements must be met in order to electronically remit to First American in SnapClose.

- SnapClose Version 1.7.1.25 or later is required. Contact SnapClose Technical Support at Email: techsupport@snapclose.com or by phone at 877-476-2725-Option #2 to set up your appointment for SnapClose to be installed.
- AgentNet credentials properly entered in your User profile in SnapClose
- Generate a "Default Invoice Charges" report in SnapClose and provide to First American in order for First American to have your endorsements appropriately mapped

eRemit Files

Follow the steps in this section to electronically remit to First American in SnapClose.

1. Click **Remittance** in the left menu under **Banking**
2. Select the appropriate **State** from the dropdown menu
3. Select "First American Title Insurance Company" from the **Underwriter** dropdown menu
4. Make the appropriate Date type and range selections from the **Criteria Range**
NOTE: To remit a specific file, select a Branch and enter a **File Number**
5. Confirm the box next to **Ready to Remit** is checked
6. Click [View Results](#)
7. Check the boxes to the left of the file(s) you wish to remit and also highlight the lines for each selection
NOTE: Files should not contain any warning (see the FAQ section for additional information)

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SnapClose / Company: Amazon Cloud DB 5 / BANKING - Remittance

2 State: NJ Underwriter: 3 First American Title Insurance Company (Marlton)

Criteria Range: 4 Type: Closing Date From: 10/01/2019 To: 10/31/2019

5 = Remitted = UW Remitted = Partially Remitted = UW Warning = Not Remitted = UW Not Ready

6 View Results

	e-remit ready	e-remit status	File Number	First Co	Property Type	Transaction Type	Premium Type	Interest
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		NJ-1054	ATLANTIC	Residential	Purchase	Simul Standard	Fee Simple
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		NJ-1057	CAMDEN	Residential	Purchase	Simul Standard	Fee Simple
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		NJ-1063	BURLINGTON	Residential	Purchase	Simul Standard	Fee Simple
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		NJ-1068	ATLANTIC	Residential	Purchase	Simul Standard	Fee Simple
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		NJ-1069	ATLANTIC	Residential	Purchase	Simul Standard	Fee Simple
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		JTNJ-102519-HiLo	BURLINGTON	Residential	Purchase	Simul Standard	Fee Simple
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		JTNJ-102519-No	ESSEX	Residential	Purchase	Simul Standard	Fee Simple
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		NJ-1074	BURLINGTON	Residential	Purchase	Simul Standard	Fee Simple
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		JTNJ-102819-a	ESSEX	Residential	Purchase	Simul Standard	Fee Simple
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		JTNJ-102819-B	ESSEX	Residential	Purchase	Simul Standard	Fee Simple
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		NJ-1075	PASSAIC	Residential	Purchase	Simul Standard	Fee Simple
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		JTNJ-103019-D	BURLINGTON	Residential	Purchase	Simul Standard	Fee Simple

8. Hover your cursor over the files to remit, right-click with your mouse and select **E-Remit (First American)**
- NOTE:** Your selections must be highlights and the boxes to the left checked in order to remit them.

Right-click context menu options:

- Print Check and Mark as Remitted
- Handwrite Check and Mark as Remitted
- Wire Transfer and Mark as Remitted
- Mark as Remitted
- Mark as Unremitted
- Print Report
- E-Remit (First American)**
- Print Payment Transmittal Sheet (First American)
- Print E-Remittance Check and Create Transmittal Report (First American)
- Print E-Remittance Check (First American)
- Check Selected
- Uncheck Selected

9. Confirm the remittance details in the confirmation window and click **OK**

Remit

You are about to remit the following items.

File Number: JTNJ-102519-HiLoanAmt -
 Title - Simultaneous Issue - \$0.00
 NJ Survey Endorsement - \$0.00
 Closing Service Letter - \$75.00
 ALTA 6.2-06 Variable Rate/Negative Amortization - \$0.00
 ALTA 9-06 Restrictions, Encroachments, Minerals - \$0.00
 ALTA 8.1-06 Environmental Protection Lien - \$0.00
 NJ Secondary Mortgage Market Endorsement - \$0.00
 Title - Loan Policy Premium - \$301.95
 Total amount for file JTNJ-102519-HiLoanAmt - \$376.95

File Number: JTNJ-102519-No CPL Charge -

These file(s) will be E-Remitted to First American and recorded in Snapclose.
 Any remittance update for these file(s) need to be completed in AgentNet.

OK **Cancel**

10. A window will appear confirming successful eRemittance. Click **OK**

11. In the next popup window choose which next step you wish to take and click **OK**

NOTE: You may choose to **Print Payment Transmittal Sheet**, **Print E-Remittance Check**, **Print E-Remittance Check and Create Transmittal Report** or **None**



Successfully E-Remitted to First American

☒ Print Payment Transmittal Sheet
☐ Print E-Remittance Check
☐ Print E-Remittance Check and Create Transmittal Report
☐ None

OK Cancel

Print Transmittal Sheet

To print your transmittal sheet for submitting to First American along with your checks, follow the steps below beginning from the **Remittance** page with the appropriate Date range selected.

1. Check the box next to Show Previously Remitted

2. Click **View Results**

NOTE: Files previously remitted meeting your criteria will appear in the list below

3. Check the box to the left of the files you wish to include in your **Transmittal Sheet**

State: NJ Underwriter: First American Title Insurance Company (Marlton)

Branch: File Number:

Criteria Range
Type: Closing Date From: 10/01/2019 To: 10/31/2019

☒ Show Previously Remitted
☐ Marked As Paid
☐ Ready to Remit

Select All Expand All Deselect All Collapse All

View Results

	e-remit ready	e-remit status	File Number	First County	Property Type	Transaction Type	Premium Type
<input type="checkbox"/>	<input type="checkbox"/>	Remitted	JTNJ-10219-A	BURLINGTON	Residential	Purchase	Simul Standard
<input type="checkbox"/>	<input type="checkbox"/>	Remitted	NJ-1052	CAPE MAY	Residential	Purchase	Simul Standard
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Remitted	NJ-1053	ESSEX	Residential	Purchase	Simul Standard
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Remitted	JTNJ-10719-A	BURLINGTON	Residential	Purchase	Standard
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Remitted	JTNJ-10719-B	BURLINGTON	Residential	Purchase	Simul Standard
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Remitted	JTNJ-10719-Refi	BURLINGTON	Residential	Refinance	Refinance
<input type="checkbox"/>	<input type="checkbox"/>	Remitted	NJ-1059	BERGEN	Residential	Purchase	Simul Standard

4. Hover your cursor over the files to remit, right-click with your mouse and select **Print Payment Transmittal Sheet (First American)**

TASKS

- My Tasks
- Overdue
- Due Today
- All Tasks (100)

BANKING

- General
- Remittance
- Reconcile Acct.
- Reconcile E-Rec.

REPORTS

- Other

PREFERENCES

- Administrator

Print Check and Mark as Remitted

Handwrite Check and Mark as Remitted

Wire Transfer and Mark as Remitted

Mark as Remitted

Mark as Unremitted

Print Report

E-Remit (First American)

Print Payment Transmittal Sheet (First American)

Print E-Remittance Check and Create Transmittal Report (First American)

Print E-Remittance Check (First American)

Check Selected

Uncheck Selected

NOTE: You may also select options to **Print E-Remittance Check and Create Transmittal Report** or simply **Print E-Remittance Check**



Frequently Asked Questions

What version of SnapClose contains eReport and Policy Upload?

- SnapClose version 1.7.1.25 or later

What are the setup requirements for using eReport and Policy Upload?

- a. SnapClose version 1.7.1.25 or later has been installed
- b. You must have valid AgentNet credentials
- c. You must have an AgentNet account set up in SnapClose
 1. Click on "User" under Preferences on the left-hand navigation column
 2. Under "FATIC Settings" enter the First American AgentNet "User Name" and "Password"
 3. Click the Save/Update button
 4. If the username and password are correct, the "Office" location will be populated
(*note, if not go back and remove the username & password, press Save/Update, redo steps 2 & 3)
 5. When the office location is correct, press Save/Update again
 6. Done and ready to use the First American Title Insurance Company / SnapClose integration
- d. You have contacted your First American representative or technical trainer to map the rates and endorsements

What files are available for eReport and Policy Upload?

- Files containing remittable products such as CPLs and eJackets

Is there a limit on the number of files remittable at one time?

- For bulk remittance, you can remit 50 files at a time


Can I single file remit and bulk remit?

- You can both single file remit and bulk remit by selecting the appropriate checkboxes and highlighting the file(s) you wish to remit

Can I reprint a transmittal sheet once I have remitted the file?

- Yes, by highlighting the files you wish to include on the transmittal sheet, right-clicking on them and selecting **Print Payment Transmittal Sheet (First American)**

What does it mean when I see a highlighted yellow column with a red asterisk?

- Files with an orange  under the "!" column indicate a warning specific for missing jackets, for instance, if it is a sale with mortgage and only one policy jacket is pulled at the time you wish to remit. There is a hover tip when you scroll your mouse over it and it will let you know what the issue is

What does it mean when my 'e-remit ready' column is highlighted in yellow or different colors?

- When your E-Remit Ready column is highlighted yellow, that is an indication of a potential remittance error. There is a hover tip for the error when you scroll over it that will provide further detail as to the potential error. You must resolve the error prior to remittance
- Files with the column highlighted red indicate files that are not ready to remit. Files that are highlighted green are ready for E-Remittance



I'm receiving a product mismatch error, what does that mean?

This indicates you have one of the following:

- a. A simultaneous policy file but only created one eJacket
- b. Created a CPL with no invoice charge
- c. A CPL invoice charge, but have not created the CPL

Why are there duplicate endorsements appearing in my AgentNet file?

- Issuing a short form loan policy jacket may result in duplicate endorsements appearing in your AgentNet file. The duplicate endorsements will contain a \$0 charge and should not be of concern. Premiums are eReportable with no error

What happens if I remitted a file in SnapClose and need to add and remit an additional Endorsement?

- You must log in to the AgentNet website, locate the file's Rates & Fees tab to add the additional endorsement, calculate the charge and Remit