



Rates and Fees – Calculate Policies in SoftPro 360®

Learn how to calculate rates and fees for Title Policy premiums using the SoftPro 360® integration with AgentNet®. Contact your First American Representative to verify proper fee mapping has been completed prior to using the Rates and Fees Integration.

Calculate Rates and Fees

Beginning from the **AgentNet** interface in SoftPro 360®:

1. Click **Add Product** in the **Title Services** dialog box
2. Click **Rates and Fees**
Calculate premiums and fees
3. Select the **Jacket** to calculate premiums for the appropriate policy
Select the Jacket to be Issued:
☒ Simultaneous
☐ Lender
First Loan
☐ Owner
4. Select appropriate **Policy** types and **Rate** types, click **Next**
5. Click **Submit**

NOTES:

- Once submitted the system will determine if additional information to calculate premiums is required. If required, answer the questions, and continue to display calculated premiums in the Review screen.
- In select states, after running Rates & Fees calculation(s), if the Transaction Code matches an available Statistical Code, it will auto-populate to your **ProForm** file. See [Transaction Code Set-up](#) section for details.

Accept and Import Premiums

1. Confirm information on the **Review** screen is accurate
NOTE: Any premium checked will overwrite any current premium residing in your file. **ONLY** check the boxes for data you wish to import and overwrite.
2. In the **Documents** section, click to view the **Summary** document
3. Click to close the preview window
4. Click **Accept**

Your **AgentNet** file now has premiums calculated:

- The **AgentNet File Summary Document** will be delivered to your **Attachments** in SoftPro.

- If not, then you must re-calculate premiums again after you have generated policy jackets to ensure you are remitting on the correct data.

Optional - Enter an Override

1. In the **Review** screen, click
2. Enter the **Override Amount**
3. Select an **Override Reason** option
4. Click **Override**

5. Click **Update**

NOTE: Updated amounts are displayed in the **New Premium, Agent, Net** and **TRID** columns.

6. Proceed to step 4 under **Accept and Import Premiums**

Electronic Remittance

To electronically remit on the file or add it to the **Remittance Queue** in **AgentNet**, check the appropriate box. For additional training see- **Electronic Remittance** job aid.



Transaction Code Set-up

SoftPro Select® users in **Texas, New Mexico** and **New York** can populate transaction codes to statistical codes in your **ProForm** file. To auto-populate transaction codes, you must select the appropriate AgentNet transaction code that matches your Softpro file statistical code.

NOTE: This feature is **ONLY** available in SoftPro Select.

Beginning from **SPAdmin** tab:



1. Click [Configuration](#)
2. In the **Management Console** window, select Drop-down Lists
3. In the **Drop-down List** screen, select Transaction Code Policy
4. In the **Transaction Code** window:
 - A. Enter statistical code **Description**
 - B. Select **Additional Title Charge**, **Endorsement/Loan/ Owners Policy**, as applicable
 - C. Click **Apply**

Code	Description	Additional Title Charge	Endorsement	Loan Policy	Owners Policy
1230	1230	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
1250		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
1300		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
1305		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1400		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

- D. Click **OK**



5. Click in the Main Menu
6. Select [Exit Select](#)

NOTE: After you log in to SoftPro Select, you can now select your **Transaction Code(s)**.

7. In your ProForm file, select **Title Insurance Premiums**
8. In each applicable **Title Insurance Premiums** screen, select the appropriate Transaction code: