





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

- Rates and Fees
 Click
 Calculate premiums and fees
- Select the Jacket to calculate premiums for the appropriate policy



- 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 Setup section for details.

Accept and Import Premiums

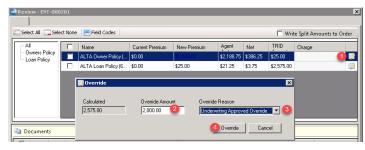
- Confirm information on the Review screen is accurate NOTE: Any premium checked will overwrite any current premium residing in your file. ONLY check the boxes for data you wish to import and overwrite.
- 2. In the **Documents** section, click to view the **Summary** document
- 3. Click to close the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

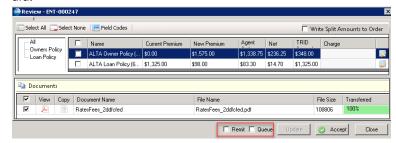


NOTE: Updated amounts are displayed in the **New Premium**, **Agent**, **Net** and **TRID** columns.

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.



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Transaction Code Set-up

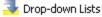
SoftPro Select® users in **Texas**, **New Mexico** and **New York** can populate transaction codes to statistical codes in your **ProForm** file. To <u>auto-populate</u> transaction codes, you must select the appropriate AgentNet transaction code that matches your Softpro file statistical code.

NOTE: This feature is ONLY available in SoftPro Select.

Beginning from SPAdmin tab:



- 1. Click Configuration
- 2. In the **Management Console** window, select

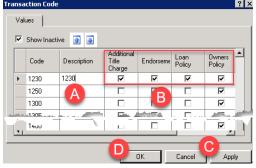


3. In the Drop-down List screen, select



- 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



- D. Click OK
- 5. Click in the Main Menu
- 6. Select X 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: 1230

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