



## Closing Protection Letter – Process in SoftPro 360®

Learn how to generate and edit a Closing Protection Letter (CPL) from your ProForm file.

### Generate a Closing Protection Letter (CPL)

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

1. Click **Add Product** in the **Title Services** dialog box
2. Click **Closing Protection Letter**  
Attach a new CPL
3. In the **Closing Protection Letter** dialog box, verify information is accurate with correct options selected  
**NOTE:** You can add a second party if needed. See **Add 2<sup>nd</sup> Party** section for steps.

4. Click
5. In the **Lender Selection** dialog box, select appropriate **Lender**, if necessary

**AgentNet - Closing Protection Letter - 2019040141**

**Lender Selection**

Filter:

| Source   | Name                                | City    |
|----------|-------------------------------------|---------|
| ProForm  | Bank of Florida                     | Florida |
| AgentNet | SoftPro Lender - Collaboration Test | nowhere |
| AgentNet | SoftPro Lender - Collaboration Test | Raleigh |
| AgentNet | SoftPro Lender - Collaboration Test | Raleigh |

Address 1:  Attn:   
 Address 2:  Phone:   
 City:  Fax:   
 State:  Zip:  Email:   
 Lender Clause:

☒ Save to "My Lenders" list on AgentNet

#### NOTES:

- **Lender** defaults to the **Lender** you entered into **ProForm**. All **Lenders** stored in **AgentNet**® are also available.
- As you start typing the lender name into the **Filter** field, the list will be filtered to improve Lender selections from AgentNet.
- **Address** and **Lender Clause** information can be edited, if necessary.

6. Click **Next** to view the **Approved Attorney Selection** window

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

7. Use **Search for Attorney** to select an **Attorney**, if necessary

8. Click

9. Click to preview in the **Review Closing Protection Letter(s)** window

10. Click to close the preview window

11. Click **Accept** to accept the selected document

**NOTE:** CPL appears in the **Title Services** section and is added to the file's **Attachment** screen. You can access it any time you log into SoftPro® 360 and AgentNet. You can click to copy and save the document in another location or paste it into an email.



## Add 2nd Party

1. In the **Closing Protection Letter** dialog box:
  - A. Verify information is accurate with correct options selected
  - B. Click **Add Second Party** checkbox option
  - C. Click Next

2. In the **Second Party Selection** dialog box:
  - A. Select/enter appropriate search criteria
  - B. Click **Search**

**NOTE:** Search results are displayed on screen.

  - C. Select applicable **Second Party** option
  - D. Click **Next**

## Update Closing Protection Letter

Follow the steps below to update the issued Closing Protection Letter.

1. In the Title Services screen, click **Update CPL**

**NOTE:** The CPL screen appears with pre-filled information, such as lender, covered party, etc.

2. Follow steps 3-11 in Generate a [Closing Protection Letter \(CPL\)](#) to complete the update