



Order Jackets and Calculate Premiums in SoftPro 360®

Learn how to generate eJackets and calculate rates and fees for Title Policy premiums in one seamless process using the SoftPro 360® integration with AgentNet®. You must have completed the appropriate endorsement mapping prior to using this feature. Jackets/Rates combo works for the initial creation of jackets only. If jackets already exist on the Title Services screen, they will need to be priced using the separate Rates and Fees service or voided prior to proceeding with Jackets and Rates combo

1. Click **Add Product** in the **Title Services** window



2. Click
3. Select the **Jacket** to calculate premiums for the appropriate policy

Select the Jacket to be Issued:

☒ Simultaneous

☐ Lender

☐ Owner

First Loan

4. Click
5. Select the **Form Type** and **Rate Type**

AgentNet - Jacket and Rates - CMH2020110209

Owner Policy Information

| Name | Value |
|---------------|-----------------------------|
| Policy Type | Owner's Policy |
| Form Type | ALTA Owner Policy (6-17-06) |
| Rate Type | Sale |
| Policy Amount | 200,000.00 |
| Loan Number | 2342323 |
| Policy Date | 11/13/2020 12:00:00 AM |

Rate Effective Date

Back Submit Cancel

NOTE: Make changes to the fields as necessary

6. Click to repeat step 5 for any remaining jackets
7. Click

NOTE: The order is sent to AgentNet

- Once submitted the system will determine if additional information to calculate premiums is required. If required, answer the questions, and

click 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.

8. Confirm information on the **Review** screen is accurate. Check the boxes next to the items you wish to add to your file.

Review - CMH2020110209

Select All Select None Field Codes Write Split Amounts to Order

| Name | Current Premium | New Premium | Agent Amt | Net | TRID Amount | Charge |
|--|-------------------|-------------------|-------------------|-----------------|-------------|-------------------------|
| <input checked="" type="checkbox"/> ALTA Loan Policy (L... | \$0.00 | \$0.00 | \$0.00 | \$0.00 | \$1,167.50 | |
| <input checked="" type="checkbox"/> ALTA Endorsement... | \$100.00 | \$100.00 | \$85.00 | \$15.00 | | |
| <input checked="" type="checkbox"/> ALTA Owner Policy... | \$1,595.00 | \$1,595.00 | \$1,355.75 | \$239.25 | \$427.50 | |
| <input checked="" type="checkbox"/> CPL Standard (Len... | \$125.00 | \$125.00 | \$0.00 | \$125.00 | | Next Available Title... |
| Total: | \$1,820.00 | \$1,820.00 | \$1,440.75 | \$379.25 | | |

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.

9. In the documents section click for the desired document to preview it

Documents

| View | Copy | Document Name | File Name | File Size | Transferred |
|-------------------------------------|------|-------------------|-----------------------|-----------|-------------|
| <input checked="" type="checkbox"/> | | LP-41397615_ | LP-41397615_.pdf | 194509 | 100% |
| <input checked="" type="checkbox"/> | | OP-41397616_ | OP-41397616_.pdf | 190539 | 100% |
| <input checked="" type="checkbox"/> | | RatesFees_50792b7 | RatesFees_50792b7.pdf | 110598 | 100% |

! Permit Queue Update Accept Close

NOTE: You can click to copy the document, enabling you to save the file in another location or paste it into an email.

10. Click

Your **AgentNet** file now has premiums calculated and policy eJackets available in the **Title Services** section of your ProForm file:

- The eJacket image(s) and Rates & Fees File Summary Document will be delivered to your Attachments in SoftPro



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 Amt, Net** and **TRID Amount** columns.

6. Click **Accept**

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
2. In the **Management Console** window, select
3. In the **Drop-down List** screen, select **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**

- 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: **1230**