

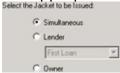




## Order Jackets and Calculate Premiums in SoftPro 360®

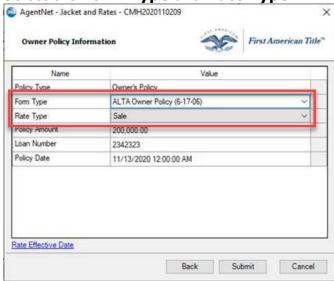
Learn how to generate eJackets and calculate rates and fees for Title Policy premiums in one seamless process using the SoftPro 360° integration with AgentNet°. You must have completed the appropriate endorsement mapping prior to using this feature. Jackets/Rates combo works for the initial creation 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
- Jackets And Rates
   Attach a new Jacket & Calculate premiums
- **3.** Select the **Jacket** to calculate premiums for the appropriate policy



4. Click Next

5. Select the Form Type and Rate Type



**NOTE:** Make changes to the fields as necessary

- **6.** Click Next to repeat step 5 for any remaining jackets
- 7. Click Submit

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 <u>Transaction Code</u> <u>Set-up</u> 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.



**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



**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 Accept

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

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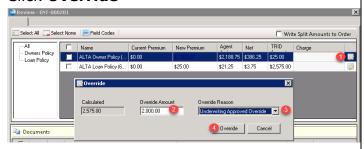




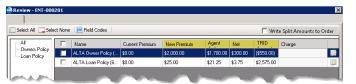


# Optional Enter an Override

- 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 <u>auto-populate</u> transaction codes, you must

select the appropriate AgentNet transaction code that matches your Softpro file statistical code.

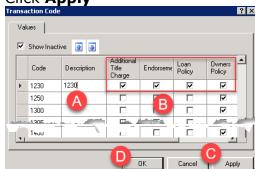
**NOTE**: This feature is **ONLY** available in SoftPro Select.

#### Beginning from **SPAdmin** tab:



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



- 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:

