Order and Accept Searches and Commitments in SoftPro 360®

Learn how to place and accept a new Searches and Commitments product in SoftPro 360®.
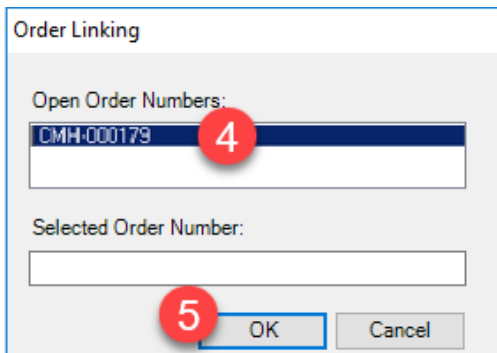
Place a New Order

Beginning from an open SoftPro file:

1. Click the **360** tab
2. Click **Services**

NOTE: The Services window opens with the available service files displayed.

3. Double-click ● FATIC - AgentNet from the **Underwriter Services** folder
4. In the **Order Linking** window, select the applicable order
5. Click **OK**

6. Click [Yes] to save your order if prompted

   NOTE: The **Welcome** page is displayed.

7. Select ☑ Skip Welcome Page
8. Click [Next]
9. In the **Login** window, enter your **AgentNet** user credentials
10. Click ☑ Remember me

    NOTE: Once you have logged into the AgentNet Integration you will not be prompted to enter your user credentials the next time you access the integration.

11. Click [Next]

    NOTE: The next screen will show the Title Services that have already been ordered on the file. If you have not ordered anything yet, this screen will be blank.

12. Click ⚠ AgentNet File Information , if needed to complete any required fields that are missing data

13. In the **AgentNet Title Services** window, click ⊕ Add Product

14. Click ➡ **Searches and Commitments**
    Order a Title Search or
    Commitment

15. Confirm and/or complete information in the **Data Review** window

16. Click [Next]

17. In the **Service Selection** window:
    A. Select an **Order Property Type** option
    B. Enter **Email** address(es)
       NOTE: The **Email Notification** field should include all addresses to receive **Order** and **Completed Search** notifications.

    C. Select a **Product**
    D. Click the **Search fees** acknowledgement checkbox
    E. Click **View Disclaimers**, if you choose
    F. Click **Next**

Service Selection   First American Title™

Order Property Type: Single Family Residence   (A) ▼

Email Notification: cheffner@firstam.com   (B)

Select Product(s):
(C) ☑ AgentNet Search Product
☐ Eagle Search Product
☐ Ownership & Encumbrances Report

(D) ☑ Search fees will be provided by the Agency Services office servicing your state. An additional agreement may be required.

(E) View Disclaimers

Back   (F) Next   Cancel

18. In the **Add Document(s) window**, click [Browse] to search and add a file, if needed
    NOTES:
    • **Browse** will allow you to choose a document from your computer.
    • **Attachment** will allow you to add a document from SPImage
    • **Documents** will allow you to add a ReadyDoc . **ReadyDoc** feature is only supported in **Standard** version at this time.

19. Click [Next] to view the **Add Note(s)** window

20. Click **New** to add a **Note** to the **Order**, if needed

21. Enter **Note(s)** into the **Text** section
NOTE: Additional land parcels can be added to the search order by including the details in the **Notes** section prior to submitting your order to AgentNet.

22. Click [Submit] to send the **Order** to **First American**

NOTE: A confirmation notifies you the order is successfully processed. Order will be sent to AgentNet.

23. Click [Close] to close the confirmation window

24. In the **Order Progress** window, click [Close]
NOTES:
- An order confirmation via email is sent to the email address(es) entered in the Email Notification field.
- Use [Status] in the **Title Services** screen to view the **Status**, **Service Order #**, **Contact** information, and **Progress** of the order. Order Status will show in the **Task** section.

Accept a New Order

1. Click [360 Queue]

2. Select **Searches and Commitments** in **Ready** status

3. Click **Next Step**

   NOTE: The **Import** screen is displayed showing data and documents, which are selected by default.

4. In the **Import Grid**:

   A. Compare the values from your file (current value) to the values that will be imported (new value)

      NOTE: Deselect values to remove the new value from the import, as needed.

   B. Edit the **New Value** by clicking [icon] , as needed

   C. In the **Documents** section, uncheck the document(s) you do not want to import

   D. Click **Overwrite Requirements/Exceptions** to deselect, if needed
      NOTE: If new **Requirements** or **Exceptions** phrases are returned, a checkbox to Overwrite Existing data may be selected. If deselected, new phrases will be appended to existing file phrases

5. Click [Accept] to import all information into your file
   NOTE: All checked items and documents are now available in the file and the **Status** displays as **Accepted**.

6. Click [Close] to close the dialog box for the selected item(s)

Job Aid: Order and Accept Searches and Commitments in SoftPro 360®_v1 | 05/19/2020　　　　4