First National
User Guide (v1.0)

February 21, 2017

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Introduction

The First National integration with SoftPro 360 will allow you to seamlessly order First National products within ProForm. In this version, SoftPro 360 will create a First National file corresponding to your ProForm Order and enable you to order CPLs and Policy Jackets through First National, as well as edit/void those that you've created through the Order. This is accomplished without leaving your SoftPro workspace, helping to facilitate a more efficient workflow by reducing or eliminating the duplication of data.

Benefits/Features

Users will be able to perform the following:

Closing Protection Letter (CPL)

- Request a CPL through First National directly from your Order.
- View the contents of a CPL.
- Copy the contents of a CPL to your clipboard.
- Accept and attach a CPL to your Order.
- Edit a CPL created from your Order.

Policy Jackets

- Request a Policy Jacket through First National directly from your Order.
- View the contents of a Jacket.
- Accept and attach a Policy Jacket to your Order.
- Void a Policy Jacket created from your Order.

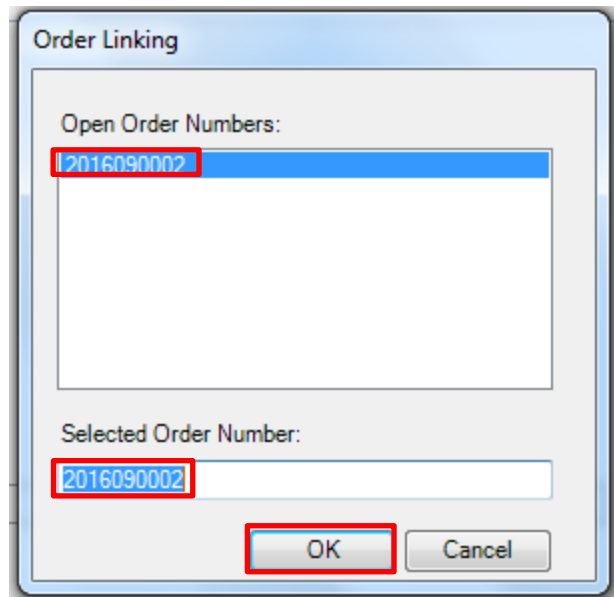# Launching First National

Access from the 360 Services Menu

From the **360 - Services Menu**, double-click **First National – FirstNet Agent Access** located under the **Underwriter Services** folder. This will open the **Order Linking** screen:
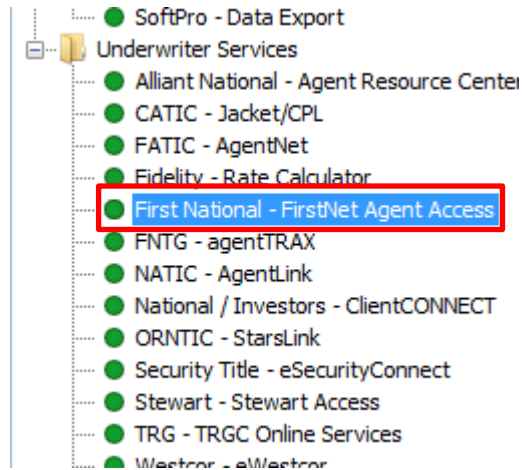
Select a ProForm Order for Your Search

From the **Order Linking** screen, you can specify the Order whose contacts you want to search:

- All the Orders that are currently opened in your 360 session will be listed in the **Open Order Numbers** pane. The **Selected Order Number** field will automatically populate with the currently active ProForm Order.
- You may **select an Order** from the list which will **automatically display** in the **Selected Order Number** field or you can manually enter the desired Order number.
- Click **OK** to navigate to the **Welcome screen**.

Welcome Screen

The **Welcome** screen provides a summary of the product & First National's contact information:
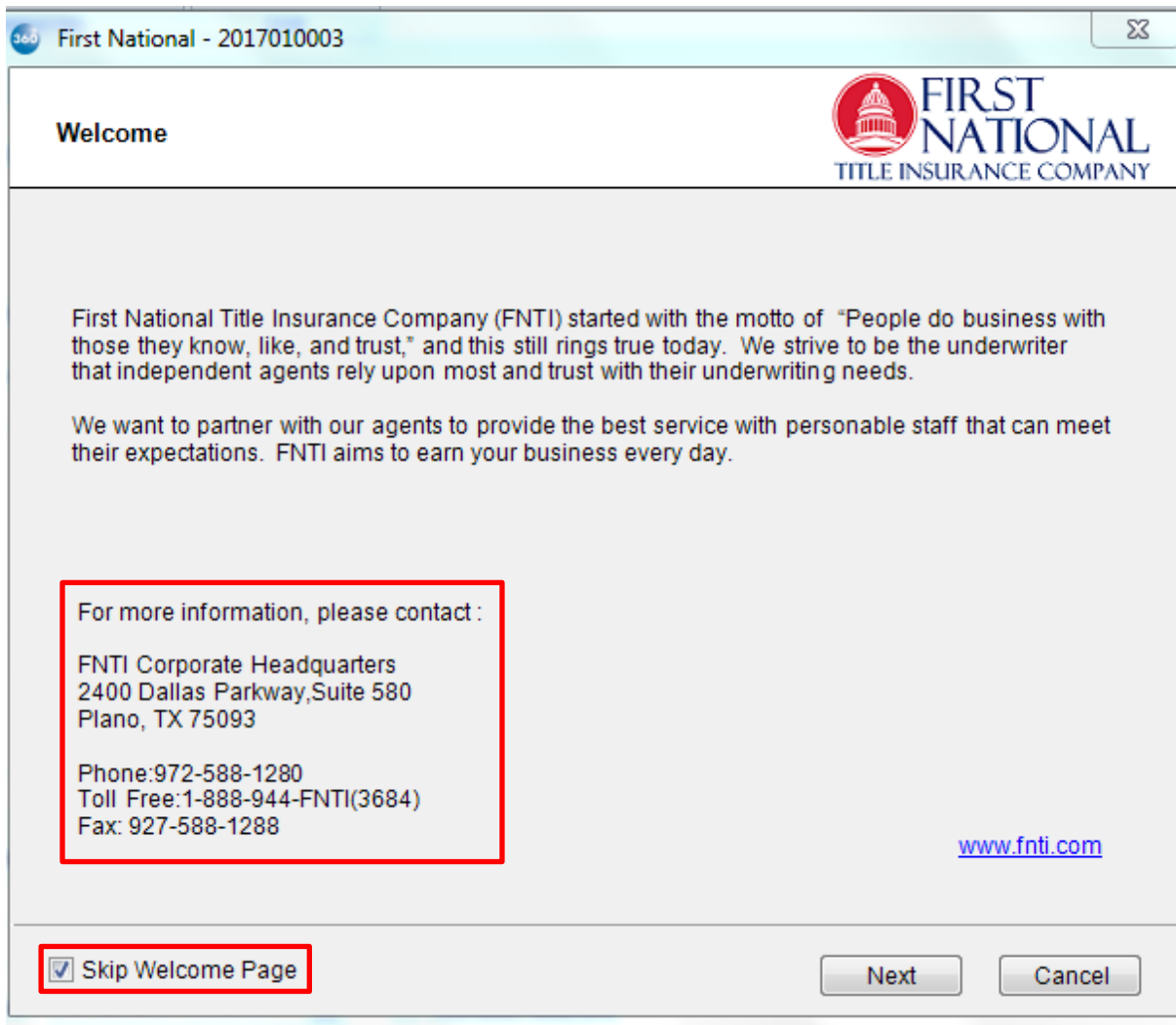
- Click **Next** to navigate to the **Login** screen.
  - Click the **Skip Welcome Screen** checkbox to bypass for future sessions.

Login Screen

The **Login** screen requires you to enter your **User ID** and **Password** that's been provided by First National. The **Remember me** check box will allow you to automatically log in the next time you launch this product.
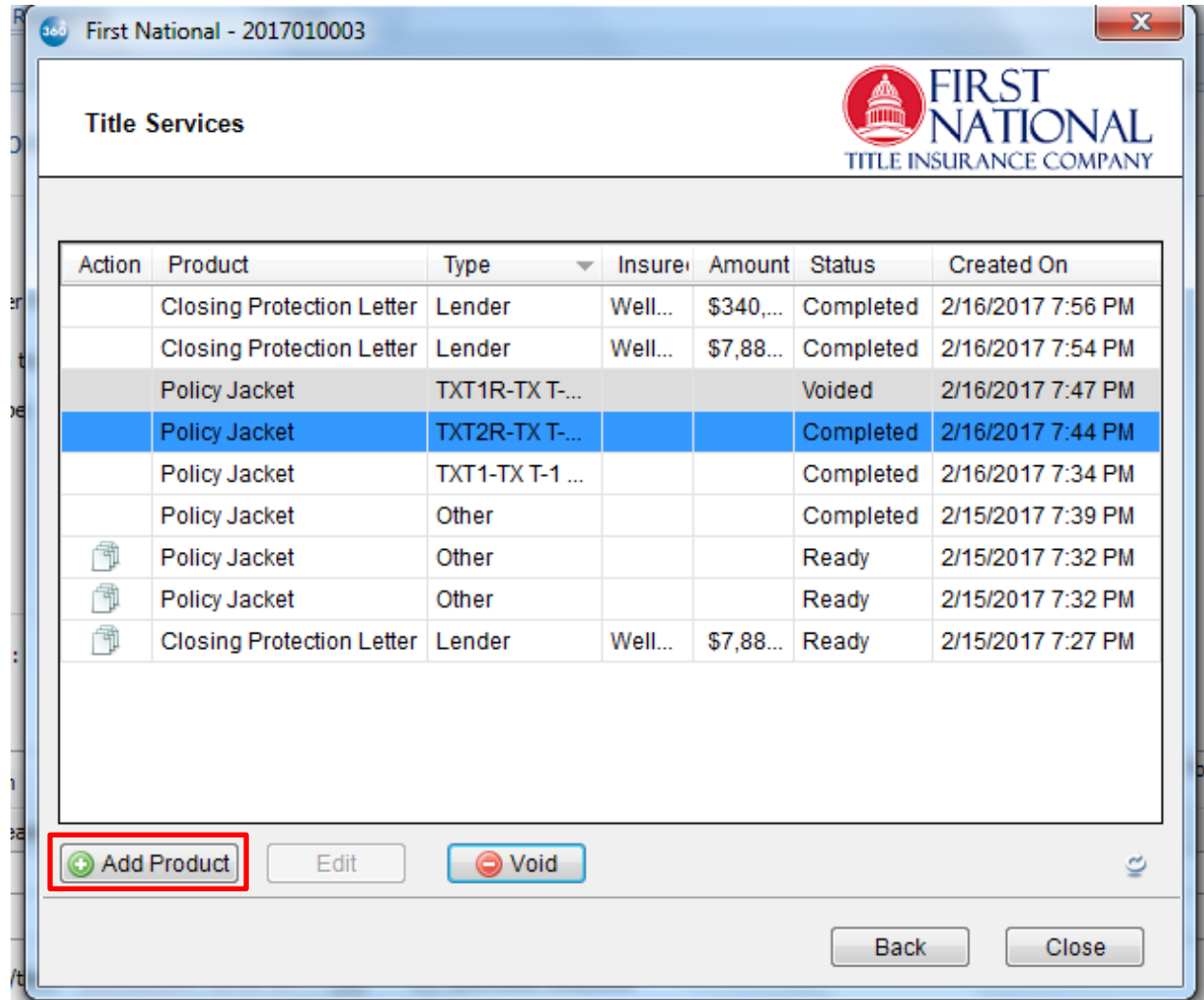
- Click **Next** to continue to the **Title Services** screen.
- **Back** button allows you to go back to previous screen; this action is standard across all the screens in the Integration.
- **Cancel** button will close the Product; this action is standard across all the screens in the integration.

Submitting a CPL Request

Title Services Screen

From the **Title Services** screen, you can begin the process of requesting a CPL or Jacket from First National:

- The **Title Services** screen displays a table that lists all the CPLs and Policy Jackets that have been generated for an Order along with the following information (column headings) for each CPL or Policy Jackets:
    - **Action**:
        - **Paper Icon** : The CPL/Jackets has not been attached to the Order (**Status** = **Ready**). Clicking the icon will navigate you to the **Review Letter** screen where you will be able to complete this action.

- **Red Question Mark** ❗: The CPL/Jacket request encountered an error and no CPL/Jackets was created. You can hover over the question mark or double-click it to view a description of the error.
- **No icon displayed**: CPL/Jackets has been voided (**Status** = **Voided**) or CPL/Jackets has been attached to the Order (**Status** = **Completed**).

o **Product**: The type of product requested from First National. The value will be **Closing Protection Letter** or **Policy Jacket.**

o **Type**: The type of CPL that was generated (e.g. **Lender**) Or The Type of Policy Jacket generated (e.g. **TXT2R-TX T-2R Short Form Residential Loan Policy**)

o **Insured:** The name of the individual or entity covered by the CPL or Jacket.

o **Amount**:
- For a Lender CPL, this value is the loan amount.
- For a Jacket, the value will be Coverage Amount.

o **Status:**
- **Ready:** The CPL or Jacket was generated but has not been attached to the Order.
- **Completed:** The CPL or Jacket was generated and attached to the Order.
- **Rejected:** An error occurred with the CPL or Jacket submission.
- **Voided:** The CPL or Jacket was canceled/voided.

o **Created On:** Date and time stamp of when the CPL or Jacket was generated.

- To **sort** the data in the table by columns, click on a column heading (except for the **Action** header). Click once to sort in ascending order and again to sort in descending order.
- To **Edit** a CPL, Select the CPL transaction from Title Services screen and click **Edit**. This will allow you to **edit** the selected CPL.
- To **Void** a Jacket, Select the **Policy Jacket** from Title Services screen and click **Void**. This will display a confirmation message to void the jacket, click **Ok** to void the Jacket.
- To **order** a CPL or Jacket, click the **Add Product** button to navigate to the **Available Products screen.**
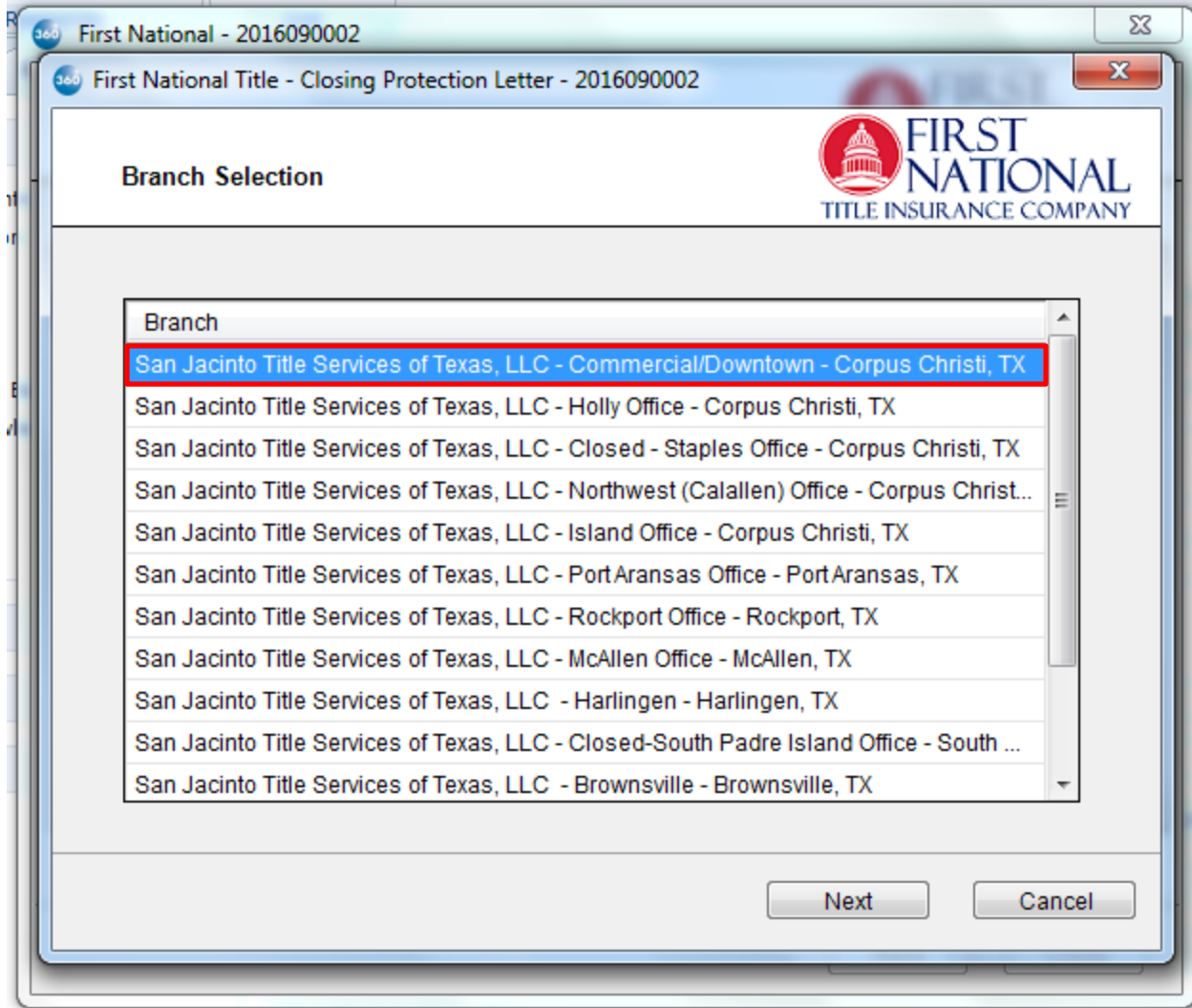
Available Products

The **Available Products** screen appears on click of **Add Product** button from Title Services screen. Click on **Closing Protection Letter** option to proceed to Branch Selection screen.
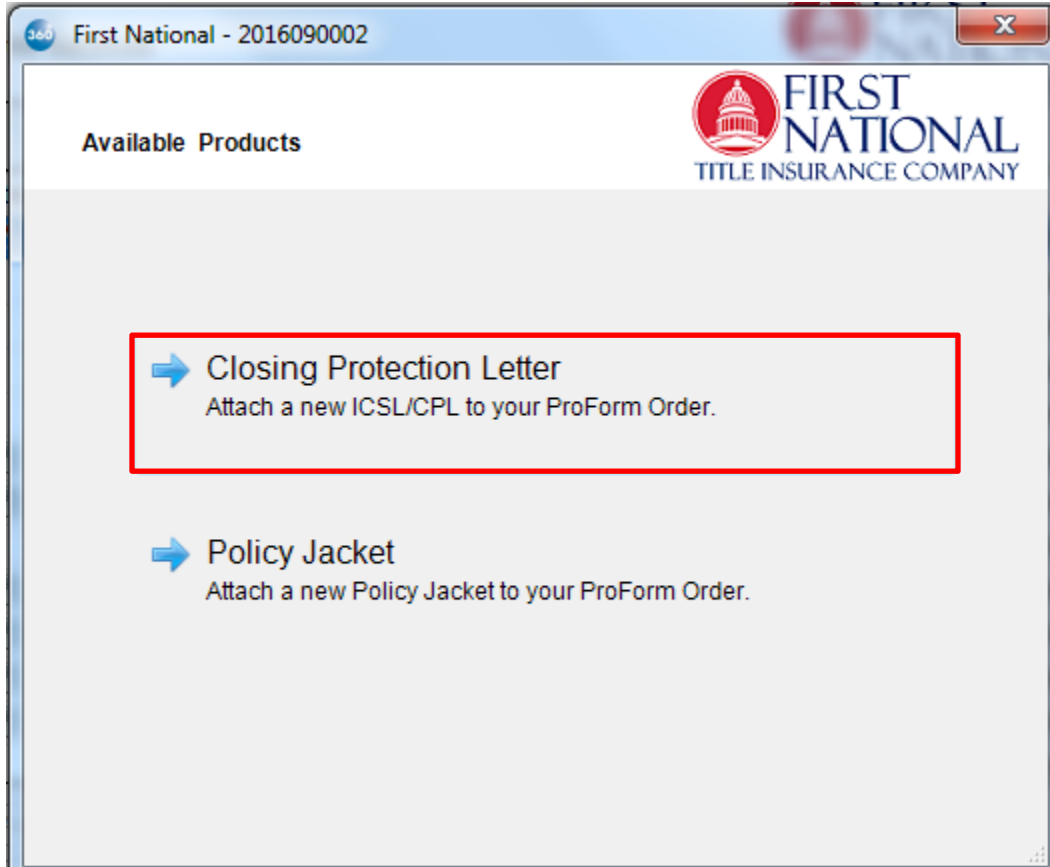
Selecting Branch

The **Branch Selection** screen lists all the branch offices assigned to you by First National and those which have the capability to issue a CPL:

- Select a Branch by clicking the desired Branch address in the list. Click **Next** to continue to the **CPL Information** screen.
- If only one Branch office is available, that Branch will be selected automatically and the application will bring you directly to the **CPL Information** screen.
- Click **Next** to continue to CPL Information screen.

Adding CPL Information

The **CPL Information** screen allows you to enter information needed to request all CPL types. Currently only Lender CPL is allowed.

- The **CPL Type** will be drop down and will be defaulted to **Lender** and non-editable.
- The selected **Branch** displays below the **CPL Type** as read-only text.
- The **Buyer/Borrower** field will display the buyer name that's in your Order. If there are multiple buyers in your Order, then their names will display together in this field. It will also display in the CPL you request. You can edit this field.
- The **Property** field will display the property address in your Order. If there are multiple properties, the first one listed in your Order will be selected and display by default. The drop-down will include the other properties as options that you can select.
- The selected **Property** will display its address in editable fields: **Address 1**, **Address 2**, **City**, **State**, and **Zip**.

- Click **Next** to continue to the Lender Information screen.

Adding Lender Information

The **Lender Information** screen allows you to enter information needed to request a **Lender CPL**.

- If your Order has multiple loans, the **Loan** field will reference each one by number. The first loan listed in the Order will correspond to **1** in the drop down; the second to **2**; the third to **3**, etc.
    - The information displayed in the other fields on this screen will change to correspond to the loan number you've selected in the **Loan** field.
- The following fields will display the corresponding values from your Order. You can also edit these fields on the screen:
    - **Loan Number**
    - **Loan Amount**
    - **Lender Name**

- ▪ **Address 1**
- ▪ **Address 2**
- ▪ **City**
- ▪ **State**
- ▪ **Zip**
- ▪ **Phone**
- ▪ **Fax**
- ▪ **Email**
- ▪ **Attention**
- Click **Submit** to send your Order request to First National. If successful, you will navigate to the **Review Letter** screen.

Reviewing the Requested CPL

After the data you've entered is sent to First National and if the submission is successful, the **Review Letter** screen will appear which allows you to access the CPL that was created.
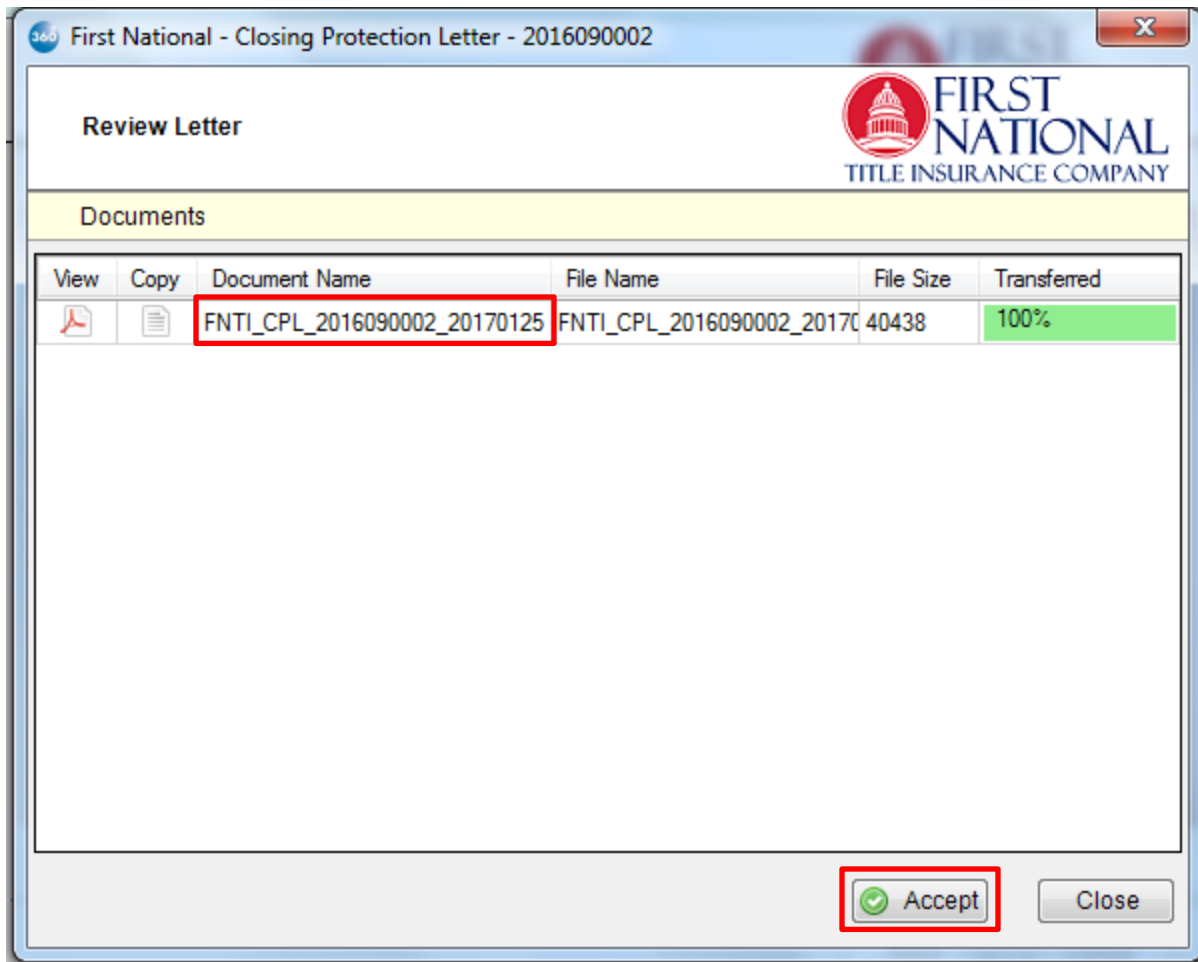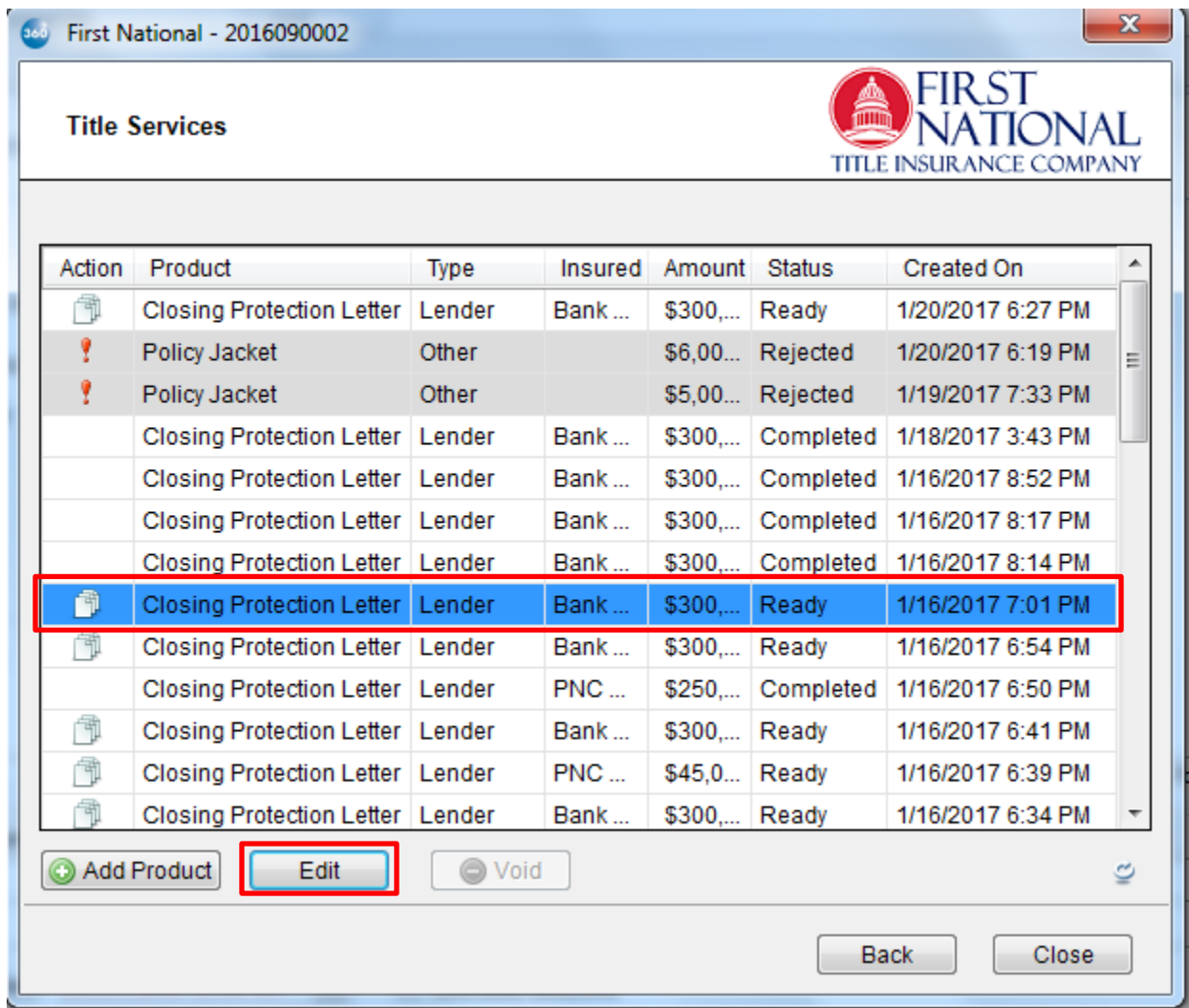
- To view the CPL, click the **PDF icon** in the **View** column.
- To copy the contents of the document to your clipboard, click the **document icon** in the **Copy** column.
- The CPL will have the same **Document Name** and **File Name**. The components of the name are formatted and will display as follows:
  - FNTI_CPL_*{Order Name}_{YYYYMMDD}*
    Example: **FNTI_CPL_FirstOrder22_20160602**
- The **Review Letter** screen also displays the **File Size** and the percent of the file that was t**ransferred** from First National.
- Click **Accept** to attach the CPL to your Order. You will automatically return to the **Title Services** screen and the CPL will have a status of **Completed**.
- If you **Close** without attaching your Order, you will return to the **Title Services** screen and the CPL will have a status of **Ready**.
- You will also be able to view the attached CPLs in your ProForm Order under the **Attachments** section of your **Order**.

Editing a CPL

From the **Title Services** screen, you can edit a CPL that you previously created from the Order.

- Highlight the CPL transaction from the list that you want to edit and click the **Edit** button. On click of Edit button, **CPL Information** screen will appear to make any edits, on click of Next **Lender information** screen will be displayed to make edits. You can click **Submit** on Lender information screen to submit edited CPL request.
- Navigation to Edit CPL: **Title Services Screen → Edit CPL → CPL Information screen → Lender Information screen → Submit.**

Submitting a Jacket Request

To order a Jacket, click on the **Add Product** icon at the bottom left of the Title Services Screen, this will launch the **Available Products**. You can click on **Policy Jacket** icon to start ordering the Jacket.
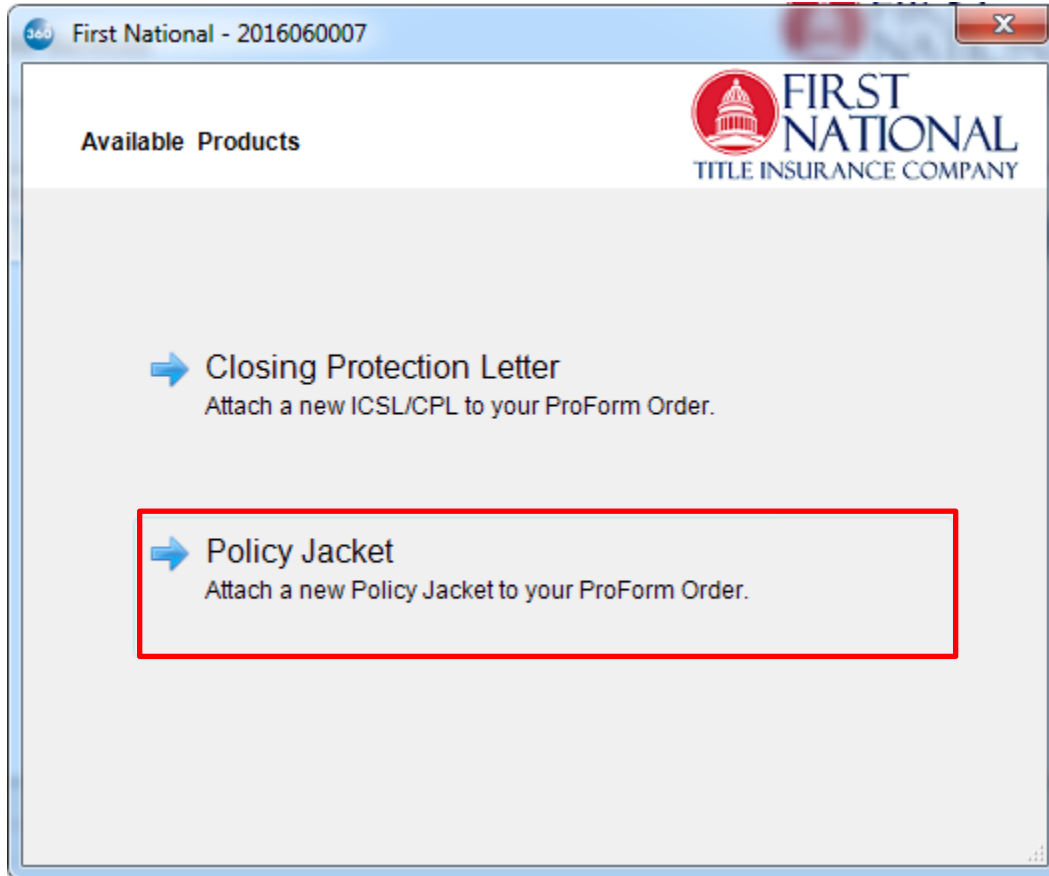
Policy Jacket Information

The **Policy Jacket Information** screen appears when you select Policy Jacket option from Available Products screen. The **Agent information** will be displayed on top as read only text. You can select the required **Policy Type/Forms** from the dropdown and click **Submit** to order the Policy Jacket.


The **Policy Jacket Information** displays the information below.

- The **Agent** Information on top as read only text.
- The **Policy Type/Forms** allows you to select the Policy Type.

Reviewing the Requested Jacket

After the data you've entered is sent to First National and if the submission is successful, the **Review Jacket** screen will appear which allows you to access the Jacket that was created.
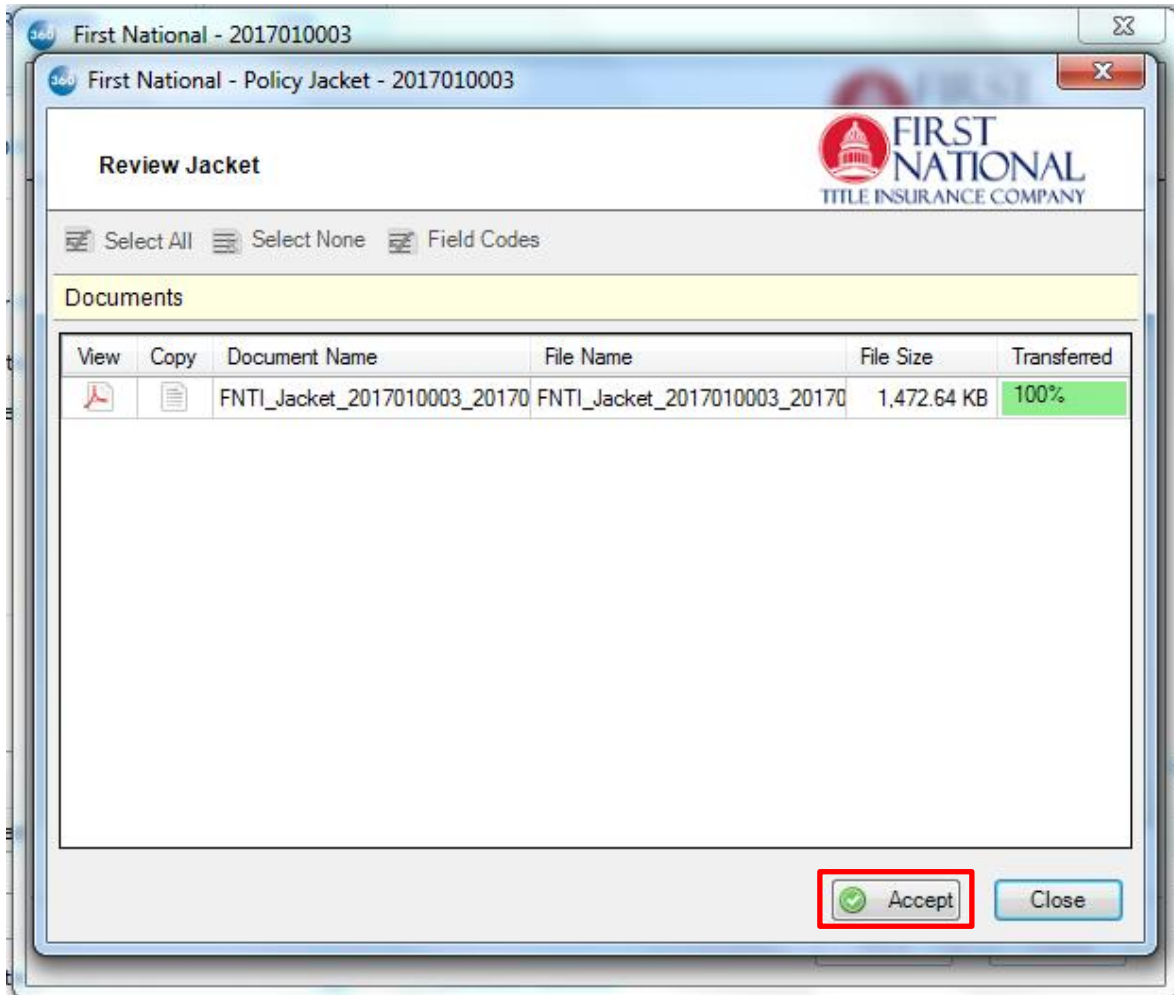
- To view the Jacket, click the **PDF icon** in the **View** column.
- To copy the contents of the document to your clipboard, click the **document icon** in the **Copy** column.
- The Jacket will have the same **Document Name** and **File Name**. The components of the name are formatted and will display as follows:
  - FNTI_Jacket_{*Order Name*}_{*YYYYMMDD*}

    Example: **FNTI_Jacket_FirstOrder22_20160602**
- The **Review Jacket** screen also displays the **File Size** and the percent of the file that was t**ransferred** from First National.
- Click **Accept** to attach the Jacket to your Order. You will automatically return to the **Title Services** screen and the Jacket will have a status of **Completed**.

- If you **Close** without attaching your Order, you will return to the **Title Services** screen and the Jacket will have a status of **Ready**.
- You will also be able to view the attached Jackets in your ProForm Order under the **Attachments** section of your **Order.**

Reviewing the Jacket when only Policy Number is returned

In some cases (e.g. **Short form Policy)** First National does not return the PDF and returns only the Policy Number to Softpro, in such cases the Policy Number will be written to ProForm's Order Notes. **The Review Jacket** Screen shall be displayed like below.

- On Click of **Accept,** the Order Number will be written to the ProForm's Order Notes.

Notes (2)

		Created	Last Modified	Note
		02/16/2017 09:13 PM	Kiran mallika	First National - New Order Accepted Policy Number: TXT2R-9899409 2/16/2017 10:27:43 AM
		02/16/2017 07:46 PM	Kiran mallika	First National - New Order Accepted Policy Number: TXT2R-9899411 2/16/2017 9:14:22 AM

Voiding a Policy

From the **Title Services** screen, you can void a Jacket that you previously created from the Order.

- You can **Void** the Jackets which are in the state of **Ready** or **Completed**. Highlight the Jacket from the list that you want to cancel and click on **Void** button.
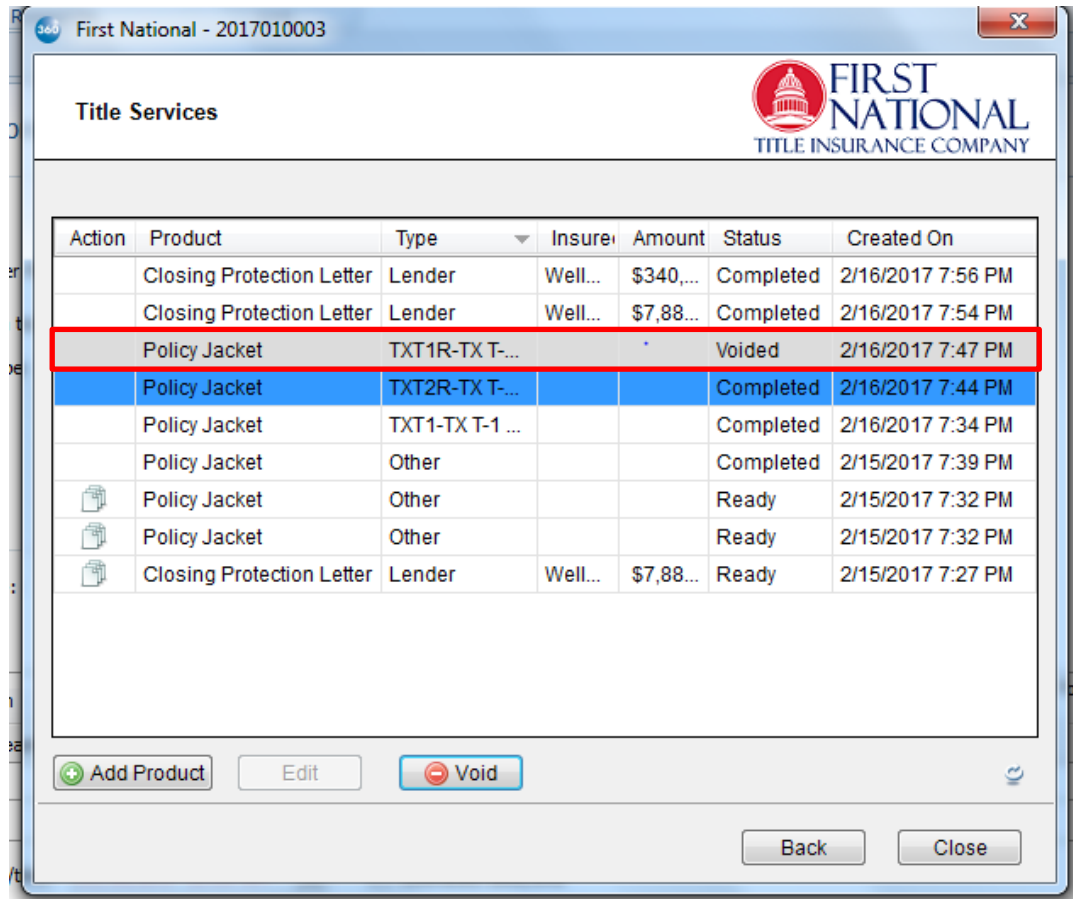
A confirmation message is displayed when you click on **Void** in Title Services screen for Jackets, if you click **Yes**, the Policy Jacket will be **Voided** and you will return to the Title Services screen where the Jacket transaction will be greyed out and the **Status** will change to **Voided**. You will no longer be able to access this Jacket.
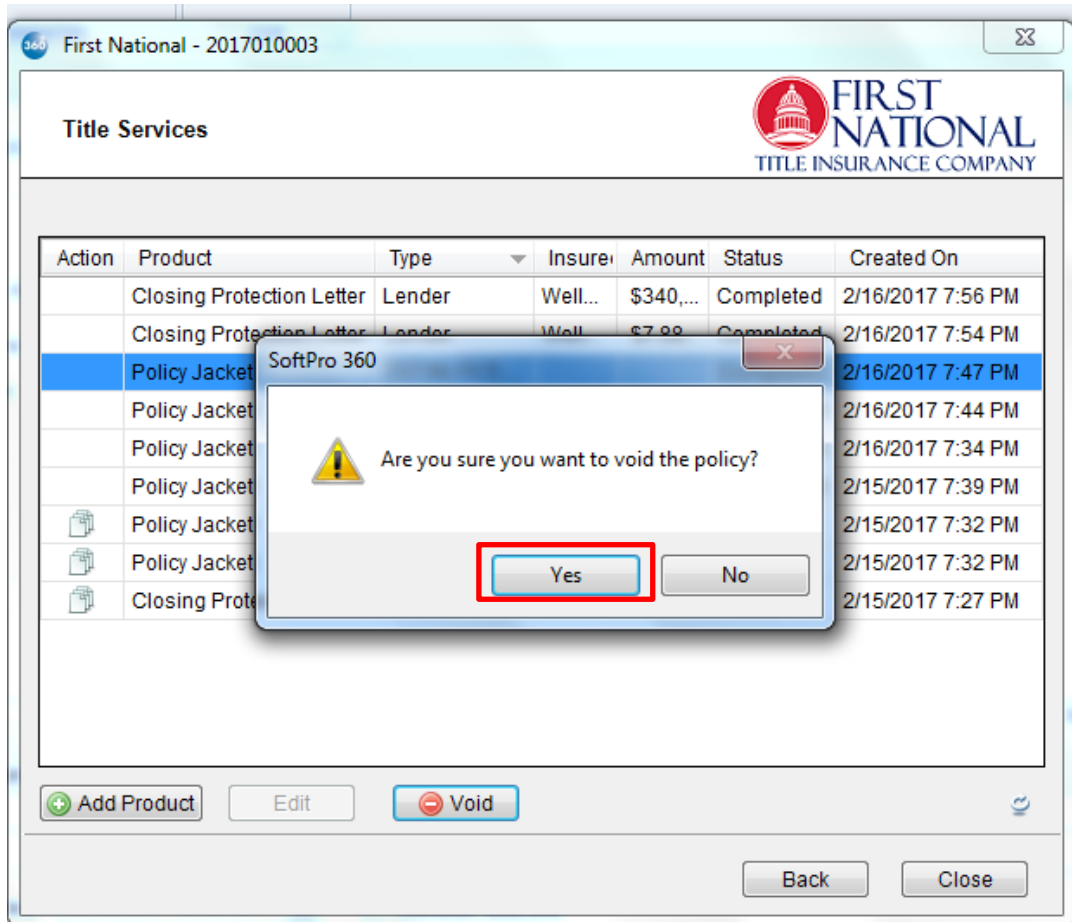
Note: Users belonging to same branch shall be able to **Void** the Jacket Created by another user.