

ATG - Attorney's Title Guaranty Fund, Inc. User Guide Standard or Enterprise Version

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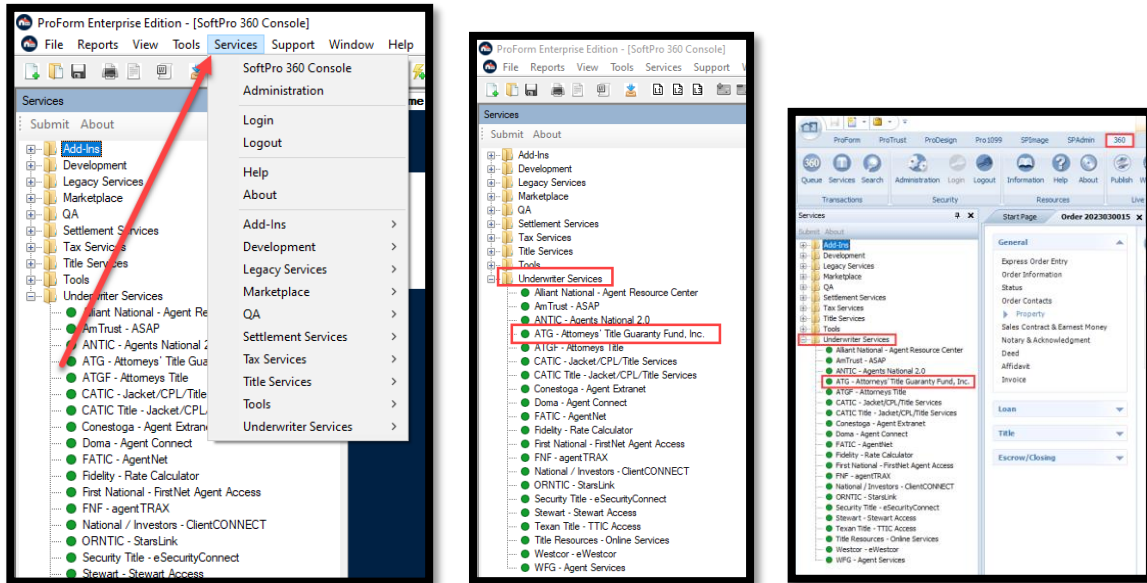
Introduction

The ATG integration with SoftPro 360 will allow ordering of ATG products using the data within ProForm. SoftPro 360 will be able to create a ATG file corresponding to information in the ProForm order and enable ordering Policy Jackets along with CPLs through ATG. Additionally, users can update and void existing CPLs and Jacket. All available without having to leave the SoftPro workspace, helping to facilitate a more efficient workflow by reducing or eliminating the duplication of data.

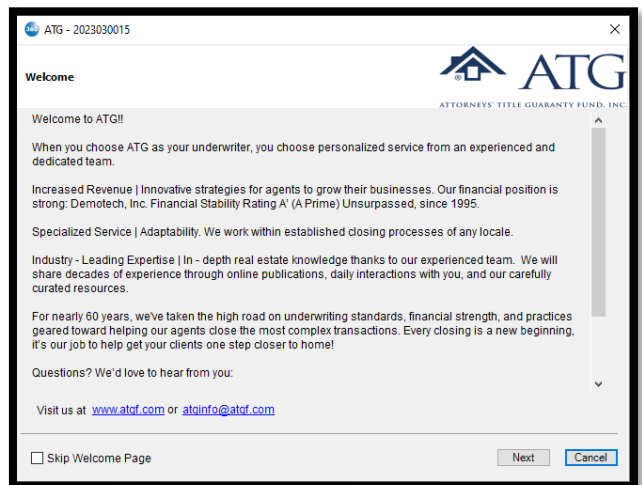
Accessing ATG - Attorney's Title Guaranty Fund, Inc.

From the Select toolbar:

1. Select the Services tab.
2. Click the Underwriter Services folder to expand.
3. Double-click **ATG - Attorney's Title Guaranty Fund, Inc.**



- The Welcome screen appears providing information on the ATG Integration.
- The **Skip Welcome Screen** checkbox will prevent the Welcome screen from being shown in the future when opening ATG.
- Click the **Cancel** button to exit the ATG process.
- Click the **Next** to launch the ATG integration.



Logging into ATG

- The **Login** screen requires to enter a valid ATG username and password.
- If you do not remember your password, you can click on the **“Forgot Password”**
- Check the **“Remember Me”** to login automatically when the ATG product launches in future sessions.
- Click **Login** to enter to the ATG Integration.
- Click **Back** to return to the **Welcome** Screen.
- Click **Cancel** to exit the ATG Integration.

Agent Information Screen

- The Agent Information Screen will allow you to review/enter Agent Information.
 - Name
 - Enter the Name of the Agent.
 - This field is required.
 - Number
 - Enter the Number of the Agent.
 - This field is required.
 - Email
 - Enter the Email of the Agent.
 - Phone
 - Enter the phone number of the Agent.
 - Street
 - Enter the Street of the Agent.
 - This field is required.
 - City
 - Enter the City of the Agent.
 - This field is required.
 - State
 - Select the State of the Agent.
 - This field is required.
 - Zip Code
 - Enter the Zip Code of the Agent.
 - This field is required.
 - Remember Me
 - Check to use this data each time the ATG Product launches in future sessions.



- Click the **Cancel** button to exit the ATG process.
- Click the **Next** button to launch **Summary** Screen.
- Click the **Back** button to return to the **Login** Screen.

Summary Screen

From the **Summary** screen, the following features are available:

- View a list of the CPLs and/or Policy Jackets that have been ordered.
- Order a CPL or Jacket.
- Void and issued product.
- View order data that has been sent to ATG.
- A table will display the products ordered from ATG and will provide the following information for each CPL and Jacket:

Action:

-  **Review**: 360 has received the CPL or Jacket from ATG (**Status = Ready**) and it is ready for the user to review and accept. Clicking the icon will display the **Review** screen, available options are review and accept the product.
- **Red Exclamation Mark** : The request submitted to ATG encountered an error and no product was created. Hover over the exclamation mark or double-click it to view a description of the error.

Product: The type of product requested from ATG. For CPLs, the value will always be **Closing Protection Letter**. For Jackets, the value will always be **Policy Jacket**.

Type: Displays the type of product ordered. If CPL is requested, it will display the Covered Party (Lender, Buyer/Borrower, or Seller). If Jacket is requested, it will display the Policy Type selected (Simultaneous, Lender, Owner, Other – Guarantee, Commitment or Binder).

Insured: Insured Party

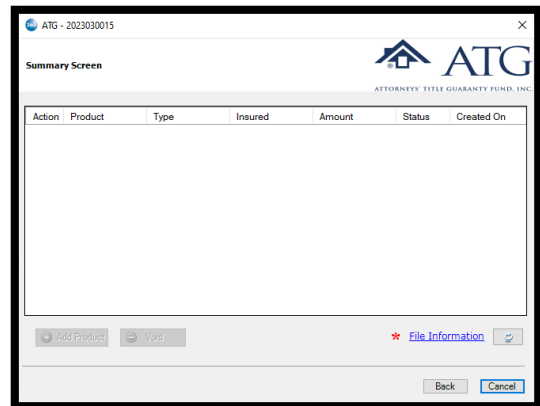
Amount: Liability amount will appear for the policy jackets only.

Status:

- **Ready:** 360 has received the remitted document from ATG and is ready for review and accept (attach to the order).
- **Completed:** The remitted product was accepted and attached to the order.
- **Rejected:** An error occurred with the submission of the request.
- **Canceled:** The product was voided.

Created On: Date and time stamp of when the product was generated.

- To **sort** the data, click on a column heading. Click once to sort in ascending order and click again to sort in descending order.
- The **Add Product** button is available to order a CPL or Jacket, respectively.
- To **update** an issued product, highlight a transaction that is in **Completed** status and click the **Update** button.
- To **cancel** an issued product, highlight a transaction that is in **Completed** status and click the



Void button.

- To view the order data that we are sending to ATG, click the File Information screen.

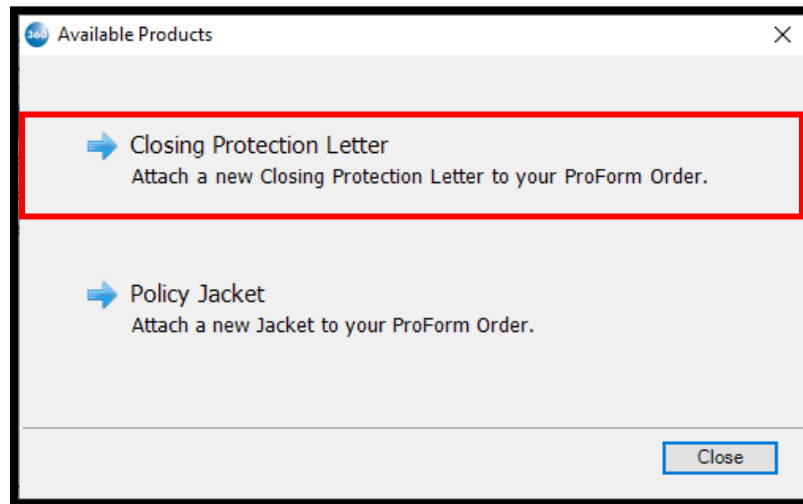
File Information Screen

- The File Information screen will display to review Property Address information, Service Type, and Category Type. These fields are **Not** editable.
- Select the Property Address for this order.
 - This drop-down will default to the first address listed in the ProForm order.
 - This drop-down will display the first five address listed in the ProForm order.
 - Address 1, Address 2, City, State, and Zip will populate with the Property Address selection for review.
- Service Type
 - Options are returned from ATG.
 - Selection Default is Mortgage.
 - This is a required field.
- Category Type
 - Options are returned from ATG.
 - This is a required field.
- Click the **Cancel** button to exit the **File Information** Screen.
- Click the **Save** button to send this information to ATG.

Available Products Screen

- Select **Closing Protection Letter** to navigate you to the **CPL Information** screen.
- Select **Policy Jacket** to navigate you to the **Jacket Selection** screen.
- Click **Close** to return to the **Summary** Screen.

Requesting a CPL



CPL Information Screen

If Closing Protection Letter (CPL) was selected, CPL Information Screen will display next.

- CPL Type
 - Select the CPL Type to send to ATG.
 - By default, CPL Types returned from ATG will be selected.
 - Selections can be modified.
 - This is required.
- Purchase Price
 - This value is pulled from the Sales Price in the ProForm Order.
 - This field is required.
- Closing Date
 - This value is pulled from the Settlement Date/Time from the ProForm Order.
 - This field is required.
- IsBifurcated
 - By default, No is selected, however; this may be changed to Yes if Closing Member information needs to be sent with the request to ATG.
 - Closing Member Number
 - Enter a Closing Member and click on Lookup to obtain the information from ATG. If the closing member exists, Name, Email, Phone, Street, City, State, and Zip will auto populate from ATG.
- Click **Cancel** to exit the CPL Screen
- Click **Next** to proceed to enter to the Covered Party Screens selected in CPL Type.

The screenshot shows the 'CPL Information Screen' form. At the top right is the ATG logo. The form contains the following fields and controls:

- CPL Type:** Three checkboxes: Lender, Buyer/Borrower, Seller.
- Purchase Price:** Text box containing '\$345,000.00'.
- Closing Date:** Date picker showing '12/05/2023'.
- IsBifurcated:** Radio buttons for 'Yes' and 'No' (selected).
- Closing Member Number:** Text box with a 'Lookup' button to its right.
- Name:** Text box.
- Email:** Text box.
- Phone:** Text box with a format mask () _ - _ _.
- Street:** Text box.
- City:** Text box.
- State:** Dropdown menu.
- Zip:** Text box with a format mask _ - _ _.

At the bottom right, there are 'Next' and 'Cancel' buttons.

CPL Lender Information Screen

- If Lender was selected as a CPL Type, the Lender Information screen will display. This information populates based on the loan chosen in the Loan Selection dropdown. The following fields will pull from the ProForm order.
 - Loan Selection
 - This will display (up to 5) loans listed in the ProForm Order.
 - Loan Number
 - This will display the loan number of the loan selected in the Loan Selection dropdown.
 - This field is required.
 - Loan Amount
 - This will display the loan amount of the loan selected in the Loan Selection dropdown.
 - This field is required.
 - Lender name
 - This will display the lender name of the loan selected in the Loan Selection dropdown.
 - This field is required.
 - Address 1
 - This will display the address 1 of the loan selected in the Loan Selection dropdown.
 - This is a required field.
 - Address 2
 - This will display the address 2 of the loan selected in the Loan Selection dropdown.
 - City
 - This will display the city of the loan selected in the Loan Selection dropdown.
 - This is a required field.
 - State
 - This will display the state of the loan selected in the Loan Selection dropdown.
 - This is a required field.
 - Zip
 - This will display the zip of the loan selected in the Loan Selection dropdown.
 - This is a required field.
 - Email
 - This will display the email of the loan selected in the Loan Selection dropdown.
 - Phone
 - This will display the phone of the loan selected in the Loan Selection dropdown.
 - Buyer/Borrower – this will display all buyer/borrower names concatenated with an and.
Ex: John Smith and Suzy Smith

NOTE: If this screen is updated, it will **not** update in the ProForm Order.

- Click **Back** to return to the **CPL Information** Screen
- Click **Submit** to send the data to ATG.
- Click **Cancel** to return to the **Summary** Screen.

CPL Buyer/Borrower Information Screen

- If Buyer/Borrower was selected as a covered party, the Buyer/Borrower Information screen will display. The following fields will pull from the ProForm order.
 - Name
 - This will display all buyer/borrower names concatenated with an and.
 - Ex: John Smith and Suzy Smith
This field is required.
 - Address 1
 - This will display the address 1 of the first Buyer/Borrower listed in the ProForm Order.
 - This is a required field.
 - Address 2
 - This will display the address 2 of the first Buyer/Borrower listed in the ProForm Order.
 - City
 - This will display the city of the first Buyer/Borrower listed in the ProForm Order.
 - This is a required field.
 - State
 - This will display the state of the first Buyer/Borrower listed in the ProForm Order.
 - This is a required field.
 - Zip
 - This will display the zip of the first Buyer/Borrower listed in the ProForm Order.
 - This is a required field.
 - Email
 - This will display the email of the first Buyer/Borrower listed in the ProForm Order.
 - Phone
 - This will display the phone of the first Buyer/Borrower listed in the ProForm Order.
- **NOTE:** If this screen is updated, it will **not** update in the ProForm Order.
- Click **Back** to return to the **CPL Information** Screen
- Click **Submit** to send the data to ATG.
- Click **Cancel** to return to the **Summary** Screen.

ATG - 2023030015

Buyer/Borrower Information Screen

ATG
ATTORNEYS' TITLE GUARANTY FUND, INC

Name: First Last and First Last

Address 1: 19650 W Dunlap

Address 2:

City: Waddell

State: AZ

Zip: 85523

Email:

Phone:

Back Next Cancel

CPL Seller Information Screen

- If Seller was selected as a covered party, the Seller Information screen will display. The following fields will pull from the ProForm order.
 - Name
 - This will display all Seller names concatenated with an and.
 - Ex: John Smith and Suzy Smith
This field is required.
 - Address 1
 - This will display the address 1 of the first Seller listed in the ProForm Order.
 - This is a required field.
 - Address 2
 - This will display the address 2 of the first Seller listed in the ProForm Order.
 - City
 - This will display the city of the first Seller listed in the ProForm Order.
 - This is a required field.
 - State
 - This will display the state of the first Seller listed in the ProForm Order.
 - This is a required field.
 - Zip
 - This will display the zip of the first Seller listed in the ProForm Order.
 - This is a required field.
 - Email
 - This will display the email of the first Seller listed in the ProForm Order.
 - Phone
 - This will display the phone of the first Seller listed in the ProForm Order.
- **NOTE:** If this screen is updated, it will **not** update in the ProForm Order.
- Click **Back** to return to the **CPL Information** Screen
- Click **Submit** to send the data to ATG.
- Click **Cancel** to return to the **Summary** Screen.

ATG - 2023030015

Seller Information Screen

ATG
ATTORNEY'S TITLE GUARANTY FUND, INC

Name: Seller Smiddle SLast

Address 1: 123 Main Street

Address 2:

City: Clinton Township

State: IL

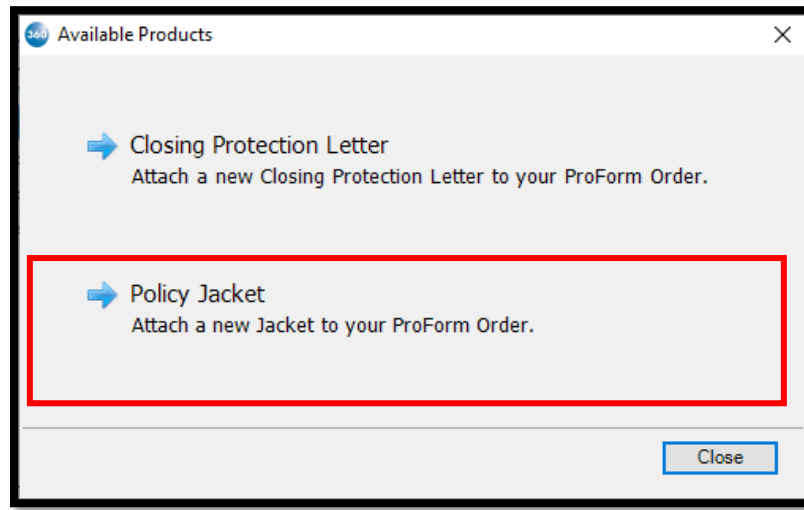
Zip: 48035

Email: derek.ball@softprocorp.com

Phone:

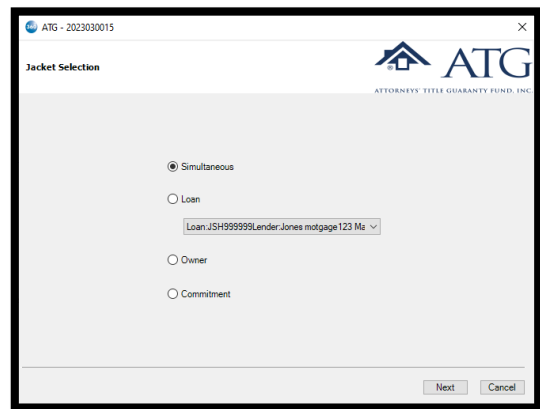
Back Submit Cancel

Requesting a Policy Jacket



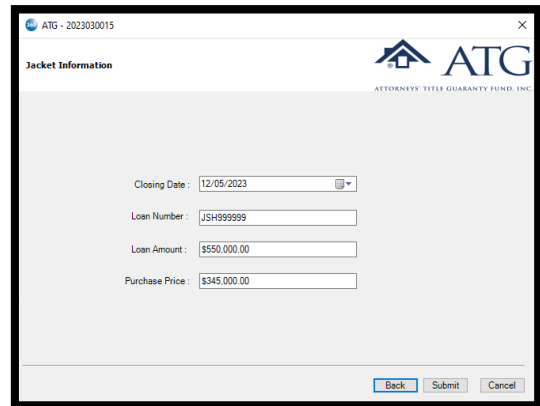
Policy Jacket Selection Screen

- If Policy Jacket was selected, Jacket Information Screen will display next.
- Simultaneous
 - Choose this to create a policy jacket for lender and owner. Choosing this option will display the Lender and Owner's Policy Screens.
- Lender
 - Choose this to create a lender policy jacket.
 - Loan drop-down
 - By default, the first loan in the order is selected.
- Owner
 - Choose this to create an owner policy jacket.
- Commitment
 - Choose this to create a Commitment policy jacket.
- Click **Next** to continue to the **Jacket Information** screen.
- Click **Cancel** to return to the **Summary** Screen.



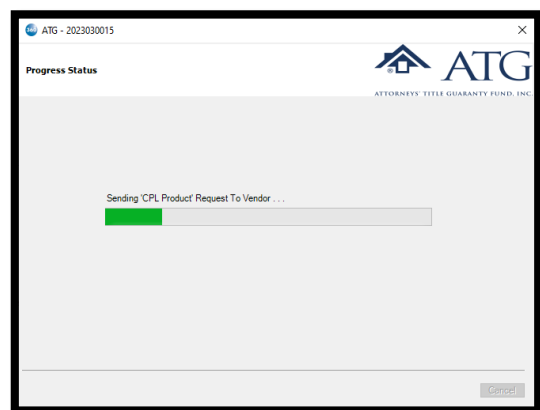
Policy Jacket Information Screen

- The Policy Jacket Information screen will display to review/edit the following information.
 - Closing Date
 - This value is pulled from the Settlement Date/Time from the ProForm Order.
 - This is a required field.
 - Loan Number
 - Loan Number will default to the loan amount of the first loan listed in the ProForm Order.
 - This is a required field.
 - Loan Amount
 - Loan Amount will default to the loan amount of the first loan listed in the ProForm Order.
 - This is a required field.
 - Purchase Price
 - Purchase Price will pull from the Sales Price from the ProForm Order.
- Click **Back** to return to the **Jacket Selection** Screen
- Click **Submit** to send the data to ATG.
- Click **Cancel** to return to the **Summary** Screen.



CPL/Policy Jacket Sending Page

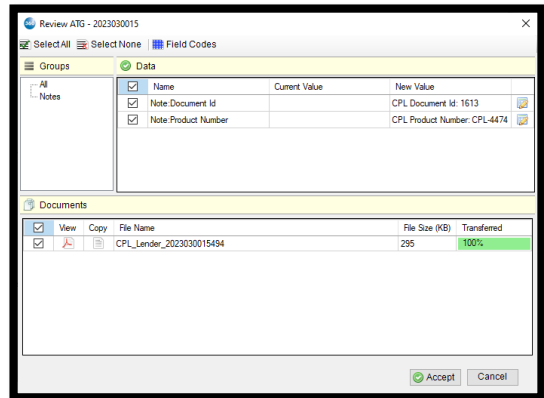
The Sending Page will display with a status bar when sending the product request to ANTIC RealSearch.



Reviewing CPL/Policy Jacket from ATG

When the status changes to Ready, user will click on the paper icon under Action to be taken to the review (next screen) to approve the document and data, if any, writing back to the SoftPro Order.

- Click Accept to import the data and documents into the corresponding order.
- CPL Information
 - CPL Document ID
 - This value will produce a note on the ProForm Order.
 - CPL Product Number
 - This value will product a note on the ProForm Order.
- Policy Jacket Information
 - Policy Type
 - This value will write to the Policy Type in the Title Insurance Premiums Screen.
 - Loan/Owner Policy
 - This value will write to the Policy Number of the associated Loan/Owner Policy.
 - Loan/Owner note
 - This value will product a note on the ProForm Order.



Voiding CPL or Jacket

From the **Summary** screen, you can edit a CPL or Jacket that you previously created from the Order.

- Highlight the CPL/Jacket transaction from the list that you want to edit and click the **Void** button.
- On click of **Void** button, you will be prompted “Are you want to want to void Jacket?”
 - Click Yes to send the void request to ATG.
 - Click No to return to the **Summary** screen.
- Once the void has been sent to ATG, you will see the Status has been changed to Canceled.

