

# CPL USER MANUAL

letterTRAX has had a makeover! You will find a fresh, sleek look that is friendly and intuitive to create letters. Now you can edit, void and view the history of letters created. The new functionality also allows for multiple letters to be created at the same time.

**Fidelity National Title Group**

**7/23/2014**

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## OBJECTIVE

### Understanding how to use the new CPL functionality in FNTG's National Agency Website

This functionality can be accessed by logging into agentTRAX and selecting the letterTRAX icon.



## AGENT SELECTION

Selection of the desired agent differs slightly in that we ask you to provide the state of the agent first. Once the additional selections of Company, Address and Underwriter are made your agent id or CLUP is displayed for your reference:

Agent Selection		Bold Fields Required	
State:	FL	Company:	Foley & Lardner, LLP, Lawyers Ti...
Underwriter:	CTIC	Name Options:	<input checked="" type="checkbox"/> Legal Name <input type="checkbox"/> DBA (Florida Title Agency)
		Address:	1 Independent Dr Ste 1300, Jac...
		CLUP:	4660.3.72.09 <input checked="" type="checkbox"/> Use as default

If you wish to use a certain agent id as a default, check the Use as default checkbox and this agent will automatically load upon subsequent login. If you wish to change the default, make the applicable selections and recheck the box.

## CREATING A DOCUMENT

Enter the file number that you wish to create a document in and click the SEARCH button.

File Number:

Generate New Document:

Form Type:

Recipient Type:  Lender  Buyer  Seller

The document type will default to CPL and the Form Type will default to Standard CPL. You can change the default Form Type if desired.

The available selections are based on the state and underwriter selected in the agent selection section above.

Select the desired recipient type(s). Most form types will default the recipient type to Lender. However, you can add or change as appropriate if available.

Clicking on the CREATE CPL button after the selection of the form and recipient types will present the data fields for completion.

The Header of this screen contains Form Details on the left and Property information on the right.

Form Details:

Form Details:	
Agent Name:	Foley & Lardner, LLP
CLUP:	4660.3.81.09
File Number:	test32614
Form Type:	Standard CPL
Recipient Type:	Lender

Property Information: Enter the street address and zip code for the property being covered by the issued CPL. The city and county will auto populate using the zip code lookup. The state will default to the state selected as part of the agent selection above. All fields can be updated as needed.

If you are issuing a letter to the buyer or seller recipient types, you will have the ability to check the **USE AS** box if you wish to use the property address as the CPL address for those parties. The data fields will be automatically populated when checked.

The **Additional Covered Property Info** field is provided in the event that you need to enter additional identifying information for the property address or if additional addresses/properties are being covered.

Property Information:		Bold Fields Required	
<b>Street Address:</b>	339 Aldrup Way	<b>Zip:</b>	32746
<b>City:</b>	Lake Mary	<b>State:</b>	FL
<b>County:</b>	Seminole	<b>Use As:</b>	<input checked="" type="checkbox"/> Buyer Addr
<b>Additional Covered Property Info:</b>	Tax id - 1232-25-25342-01 - Lot 24 Chase Groves Subdivision		

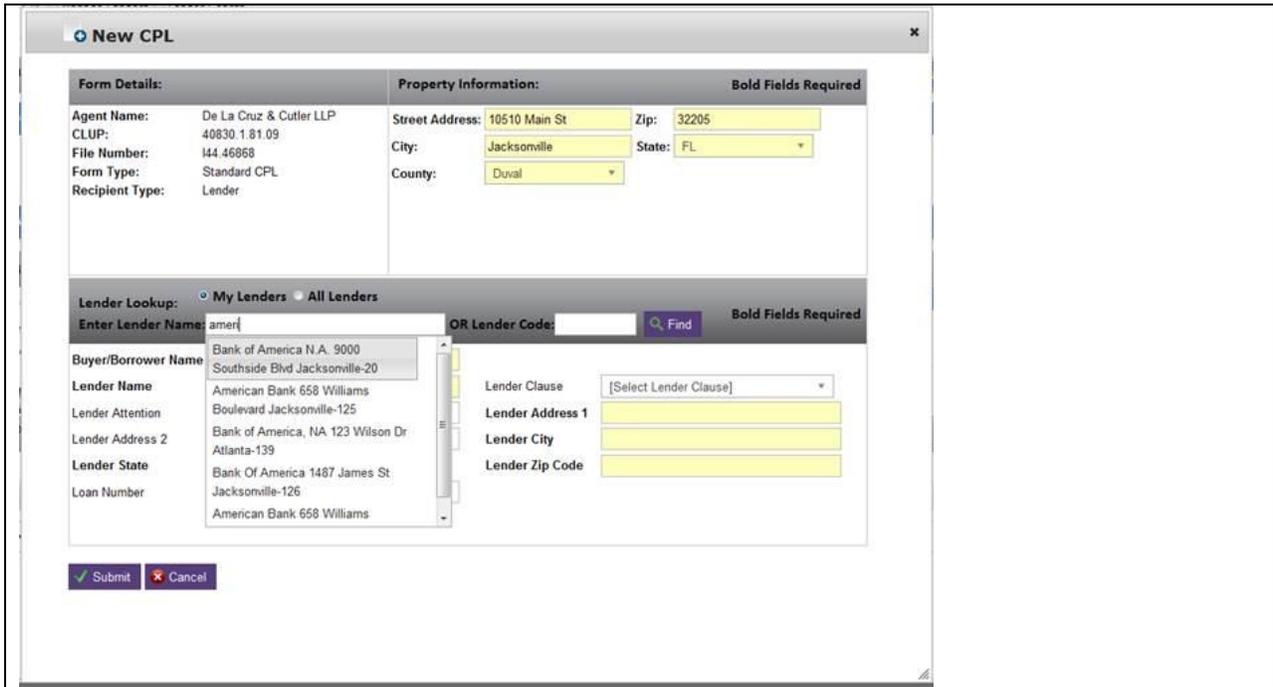
If you are a TitleWave user and you have entered a file number matching a TitleWave order, this data will be populated for you to minimize rekeying.

**Data Fields:**

The data fields presented are based on the form and recipient type(s) selected. The fields that are required will have a shaded background and a bold label.

**Lender Information** will be saved to the global database as well as your My Lenders address book as letters are created.

In order to search for a lender using the **MY LENDERS** option (default selection) begin typing in the lender name field and a dropdown of the available lenders in your address book will appear for selection. Click on the desired lender and the data entry fields will be populated automatically.

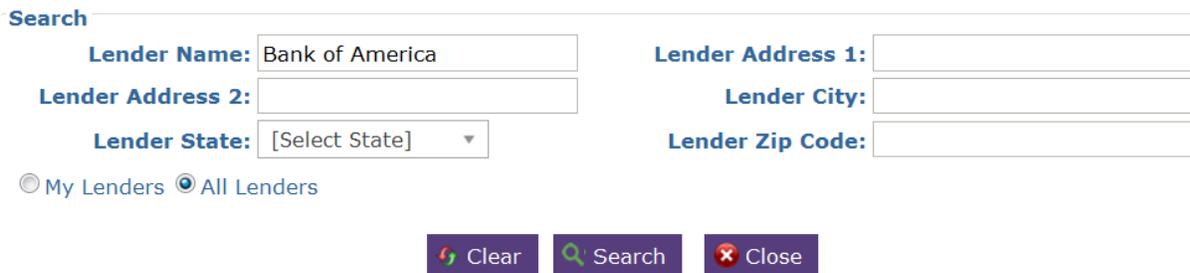


To search for a lender using the Lender Code – simply type the code in the provided field and hit the find button. The lender data will again be populated automatically.

In order to search for a lender, using the “**All Lenders**” option – select the All Lenders option and then enter the lender name and click on the Find button.



Notice that you do not have to enter the entire lender name to get results. If you wish to further filter the results you can enter additional information in the fields provided and clicking on the Search button.



If no match found, close and complete lender fields as indicated, upon letter creation lender will be added to database for future selection.

To select the lender from the result set, simply click on the lender code. The selected lender information will automatically be populated in the data fields.

Showing 1 - 8 of 16 total results

Lender Code	Lender Name	Lender Address	City, State, Zip
<a href="#">5</a>	B&B Bank	101 Main St.	Somecity, WA 92932
<a href="#">6</a>	B&B Bank	101 Main St.	Somecity, WA 92932
<a href="#">47</a>	Bank of Alabama	9 Plaza Blvd	Jacksonville, FL 12345
<a href="#">23</a>	Bank of Alabama	87 Main St	Birmingham, AL 35125
<a href="#">20</a>	Bank of America N.A.	9000 Southside Blvd Ste 700	Jacksonville, FL 32257
<a href="#">37</a>	Bank of America N.A.	9000 Southside Blvd #700	Jacksonville, FL 32256
<a href="#">44</a>	Bank of America N.A.	1 Plaza Blvd	Atlanta, GA 30324
<a href="#">21</a>	Bank of America N.A.	9 Plaza Blvd	Atlanta, GA 30324

Once the required fields are completed, click on SUBMIT.

After completing the process of printing or emailing, you will be returned to the file and the grid will show the created document(s). You can take any desired/available action on the document from this grid.

File Number:

Generate New Document:

Form Type:

Recipient Type:  Lender  Buyer

**Property Information:**

Street Address: 1820 Smith St      City: Jacksonville  
 State: FL      Zip: 32254  
 County: Duval

**Documents**

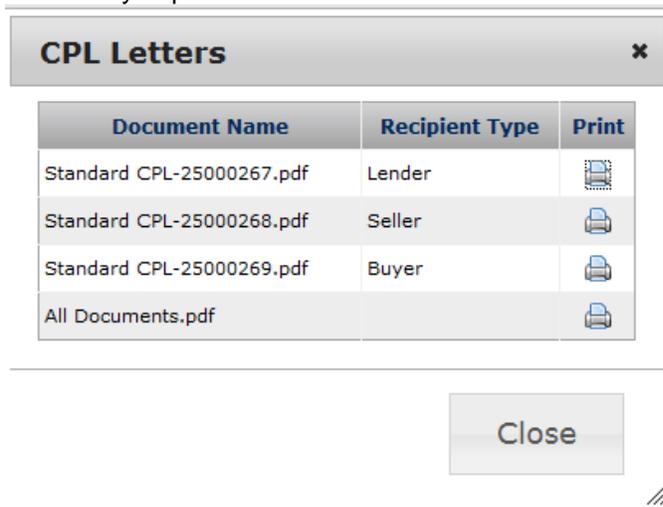
File Number	Property Address
test	1820 Smith St Jacksonville FL 32254

Document View/Print	Insured Name	Form Name	Status	Last Modified (EST)	Recipient Type	Action
<a href="#">26000556</a>	Fidelity	Standard CPL	Active	6/2/2014 12:17:17 PM	Lender	  

## PRINTING A DOCUMENT

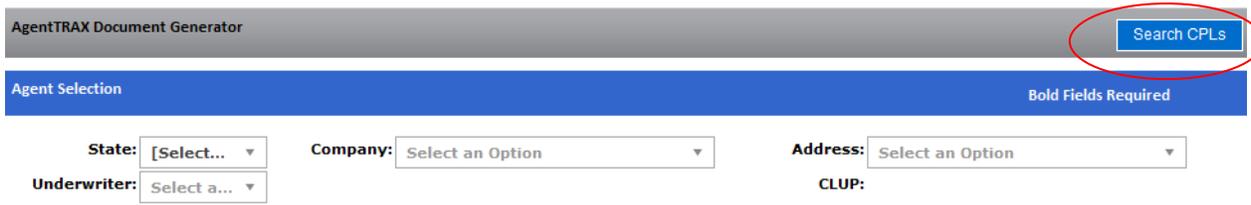
If you have created a letter for more than one recipient, the print dialog will allow you to select each letter individually to print and/or email.



Select the All Documents option if you wish to print all created letters at once.

## SEARCHING FOR A DOCUMENT

To search for a document that you have created, click on the SEARCH CPLs button located in the upper right hand corner of the Document Generator screen.



Once Search CPLs is selected the following parameters are presented.

agentTRAX Document Search

State [Select a State] ▼	Company Select an Option ▼
File Number [Text Field]	Address Select an Option ▼
Property Street Address [Text Field]	Underwriter Select an Option ▼
Insured [Text Field]	Document Type [Select a Document Type] ▼
Create Date [Calendar] to [Calendar]	Form Type Select an Option ▼
Document Number [Text Field]	Document Status [Select a Status] ▼

 Search  Clear

STATE is a required field for all searches. Along with state any combination of the remaining parameters may be selected to refine the search.

The results grid will be populated below and any available action can be taken from this screen.

File Number	Property Address
test32614	123 Main Street Sanford Baker FL 32773

Document View/Print	Insured Name	FormName	Status	Created On (EST)	RecipientType	Action
<a href="#">25000269</a>	Mickey Mouse	Standard CPL	Active	3/27/2014 11:36:50 AM	Buyer	  
<a href="#">25000268</a>	Donald Duck	Standard CPL	Active	3/27/2014 11:36:50 AM	Seller	  
<a href="#">25000267</a>	Bank of America	Standard CPL	Active	3/27/2014 11:36:48 AM	Lender	  

## EDIT CPL

The EDIT icon  is available so long as the document is in an ACTIVE status. Clicking on the Edit icon will load the previously entered information for this document in order for you to make any necessary corrections or updates.

 **Edit CPL**
✕

Form Details:	Property Information:	Bold Fields Required
<b>Agent Name:</b> Bradley Arant Boulton Cummings LLP <b>CLUP:</b> 37321.1.82.01 <b>File Number:</b> test32614 <b>Form Type:</b> Standard CPL <b>Recipient Type:</b> Buyer	<b>Street Address:</b> <input type="text" value="123 Main Street"/> <b>City:</b> <input type="text" value="Sanford"/> <b>State:</b> <input type="text" value="FL"/> <b>Zip:</b> <input type="text" value="32773"/> <b>County:</b> <input type="text" value="Baker"/>	

Bold Fields Required			
Commitment Number:	<input type="text"/>		
<b>Buyer/Borrower Name</b>	<input type="text" value="Mickey Mouse"/>	<b>Buyer/Borrower Street Address</b>	<input type="text" value="333 Main Street"/>
<b>Buyer/Borrower City</b>	<input type="text" value="Kissimmee"/>	<b>Buyer/Borrower State</b>	<input type="text" value="FL"/>
<b>Buyer/Borrower Zip Code</b>	<input type="text" value="32755"/>		

 Save and Reprint
 Cancel

Once the desired changes are made, click on the SAVE AND REPRINT button.

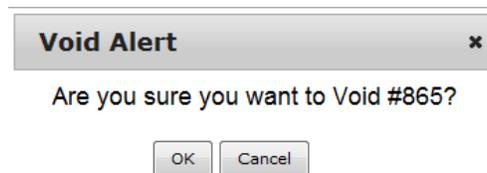
Note that only the latest version of the edited document will be available for selection in the document grid.

## VOID CPL

The VOID icon  is available so long as the document is in an ACTIVE status.

Document View/Print	Buyer/Borrowers Name	FormName	Status	Create Date	RecipientType	Action
<a href="#">865</a>	Mickey Mouse	Standard CPL	Active	01/22/2014	Lender	

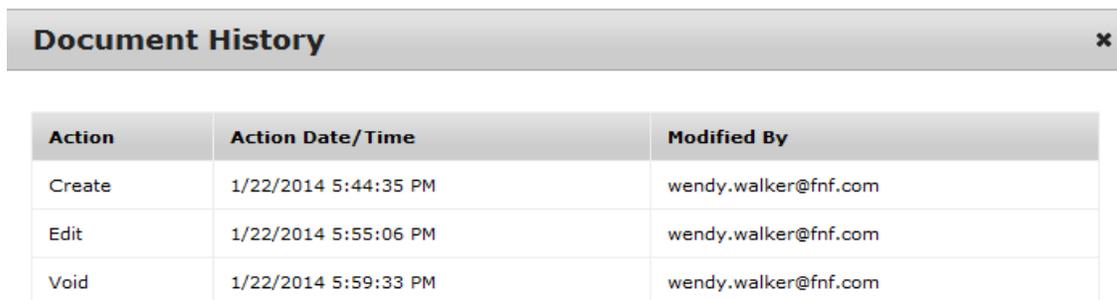
Clicking on the VOID icon will present a message asking for confirmation



A void letter can't be reinstated; a new letter must be generated if appropriate.

## DOCUMENT HISTORY

Selecting the Document History action icon  will present a window containing information on the selected document.



**Document History** ✕

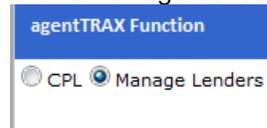
Action	Action Date/Time	Modified By
Create	1/22/2014 5:44:35 PM	wendy.walker@fnf.com
Edit	1/22/2014 5:55:06 PM	wendy.walker@fnf.com
Void	1/22/2014 5:59:33 PM	wendy.walker@fnf.com

In the sample above, you can see the CPL was created, edited and voided and by which user.

To close the window, click on the X located in the upper right hand corner.

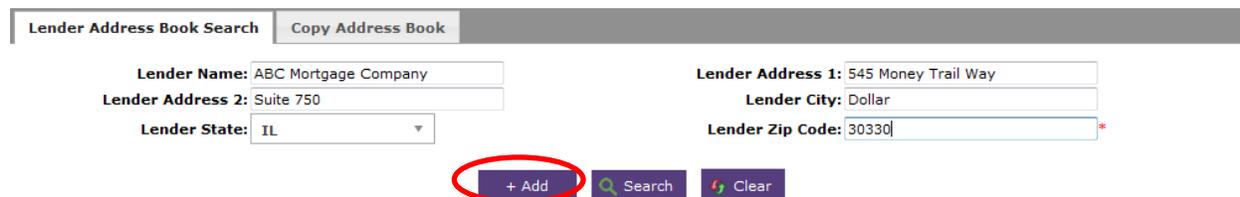
## MANAGE LENDERS

The ability to edit the lender information added to your My Lenders address book is provided by clicking on the Manage Lenders radio button located at the top left portion of the CPL screen.

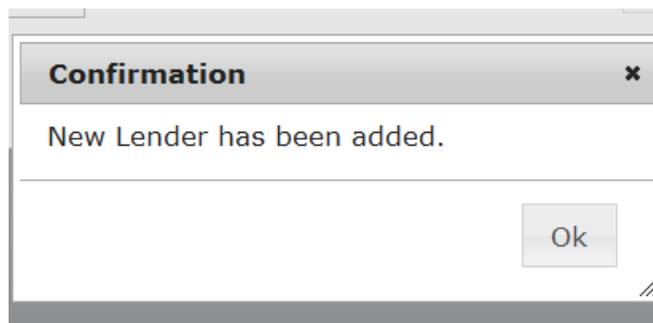


Lender Address Book Search provides the ability to add new lenders or search for and edit existing lender information.

To add a new lender, input all of the information in the provided fields and click on the Add button.



You will be provided with a message that the lender has been added to your address book.



To search for an existing lender, input as much of the known lender information and click on the Search button.

Lender Address Book Search
Copy Address Book

Lender Name:

Lender Address 2:

Lender State:

Lender Address 1:

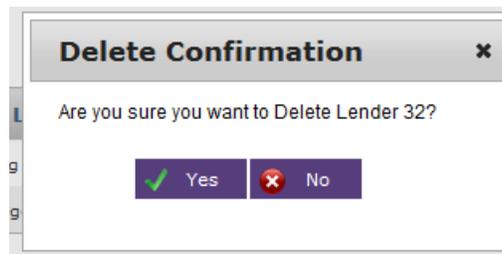
Lender City:

Lender Zip Code:

+ Add
🔍 Search
🗑 Clear

Select	Lender Code	Lender Name	Address	City, State, Zip
<a href="#">Edit</a> <a href="#">Delete</a>	32	ABC Lending Company	1001 Money Way Suite 500	Greenback, IL 33309
<a href="#">Edit</a> <a href="#">Delete</a>	33	ABC Mortgage Company	545 Money Trail Way Suite 750	Dollar, IL 30330

You can elect to Edit or Delete the lender by selecting the appropriate action under the Select options. If you select the Delete option, a confirmation message will appear before the deletion will occur.



And a confirmation of the deletion will be presented.



If you select the Edit option, you are presented with the lender fields to update. Once the desired changes are made, click on the Save button.

**Edit Lender Code 33**
✕

<b>Lender Name:</b> <input type="text" value="ABC Mortgage Company"/>	<b>Lender Address 1:</b> <input type="text" value="545 Money Trail Way"/>
<b>Lender Address 2:</b> <input type="text" value="Suite 750"/>	<b>Lender City:</b> <input type="text" value="Dollar"/>
<b>Lender State:</b> <input type="text" value="IL"/>	<b>Lender Zip Code:</b> <input type="text" value="30330"/>

A confirmation message that the edit has been performed will be presented.

**Confirmation**
✕

Lender Code has been successfully updated from 33 to 34

If you wish to copy a co-worker's address book, enter their email address in the field provided and select copy. This will add all their lenders to your address book and a confirmation message will be provided.

agentTRAX Function

CPL
 Manage Lenders
 Lender Search

Lender Address Book Search
Copy Address Book

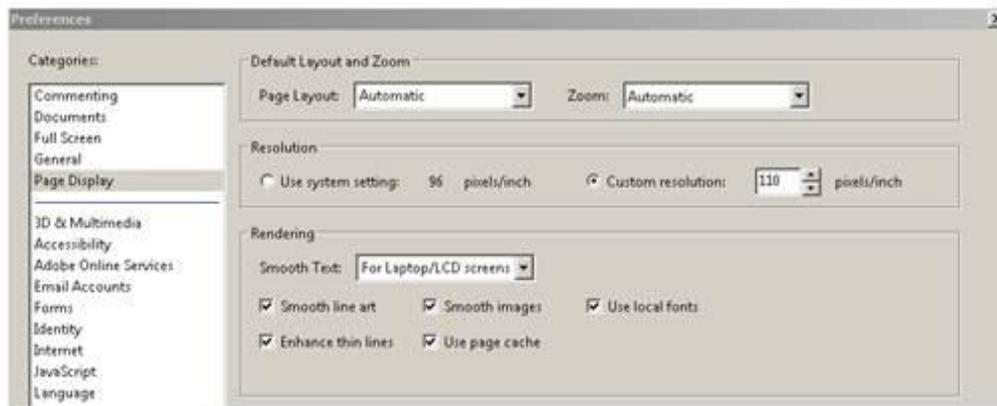
Enter User Email Address:

**Confirmation**
✕

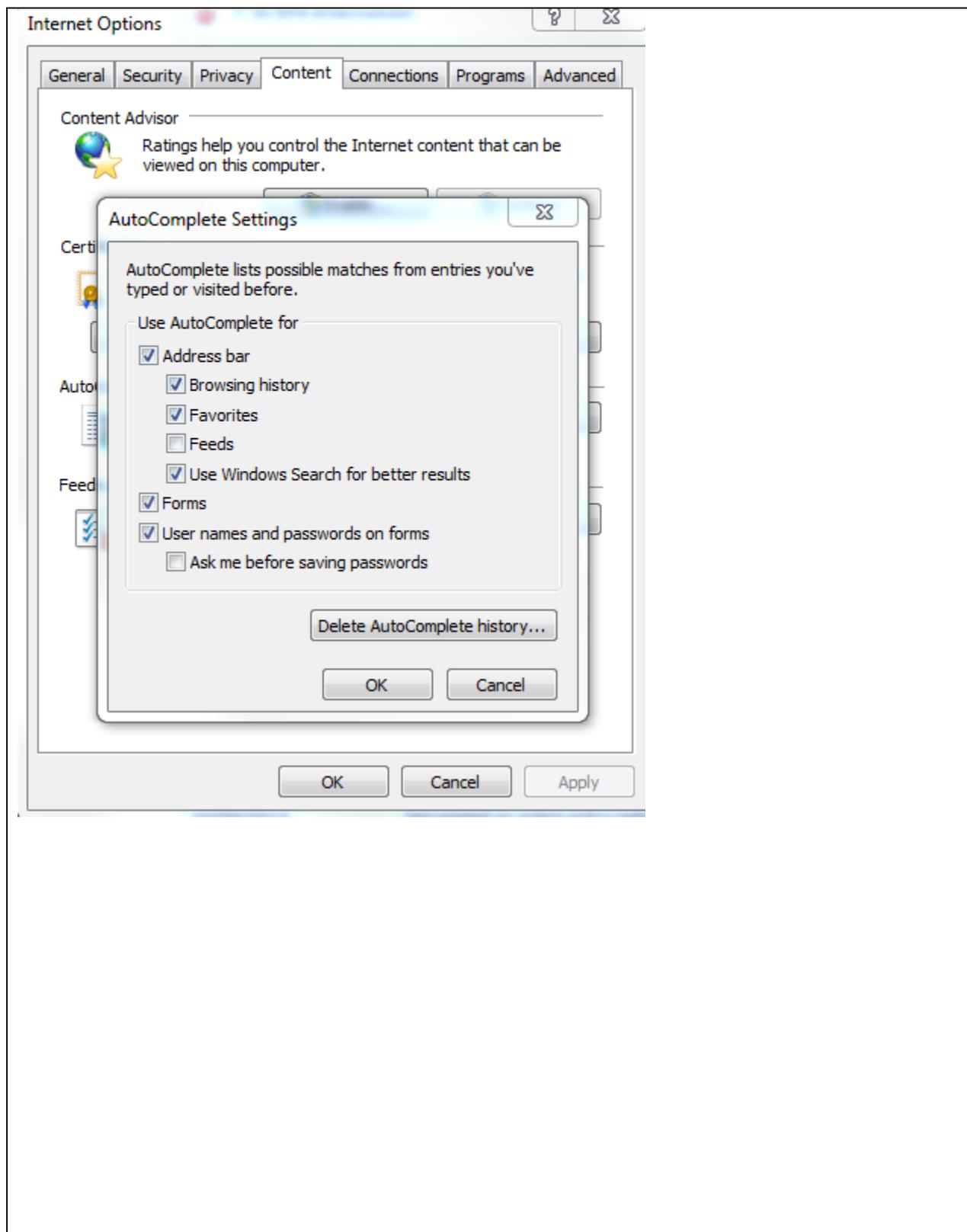
2 records have been successfully copied

## CPL FREQUENTLY ASKED QUESTIONS

1. Can I save the new CPL module URL as one of my favorites and go directly there?  
No. You must log into the new module via the agentTRAX website in order to be properly authenticated. If you try to bypass the agentTRAX login, you will get an error message saying "Token has expired".
2. My CPL is printing in a "funky" font. How do I correct this?  
In Adobe under Preferences, select Page display and select the checkbox to Use local fonts.



3. How do I enable the "Auto Fill" feature in Internet Explorer in order to be able to select previously entered information for the field?  
On the Internet Explorer menu select "Tools"  
Then Internet Options  
Select the Content tab  
Then click on the Settings button in the Auto Complete section  
Check the checkbox next to Forms  
Click OK



## OBTAINING A RATE QUOTE

Within the Document Generator, you now have the ability to obtain and store a Rate Quote from FNTG's National Rate Calculator (NRC).

To start a quote, ensure that you are in the desired file for the quote and select the Rate Quote option from the Generate New Document dropdown and click on the Create button.

File Number:

Generate New Document:

Property Information:		
Street Address:	1820 Smith St	City: Jacksonville
State:	FL	Zip: 32254
County:	Duval	

You will then be presented with the New Rate Quote screen as shown below.

+ New Rate Quote
x

<b>Agent Name:</b> Foley & Lardner, LLP, Lawyers Title <b>Exchange Center:</b> Exchange Center <b>CLUP:</b> 4660.3.72.09 <b>File Number:</b> TEST <b>Form Type:</b> Rate Quote	<b>Street Address:</b> <input type="text" value="1820 Smith St"/> <b>Zip:</b> <input type="text" value="32254"/> <b>City:</b> <input type="text" value="Jacksonville"/> <b>State:</b> <input type="text" value="FL"/> <b>County:</b> <input type="text" value="Duval"/>
--	---

**Bold Fields Required**

**READ THIS FIRST...it's as easy as 1-2-3**

1. When you click the Create Rate Quote button, the National Rate Calculator will open in a new Window or Tab.
2. Enter the information, create your quote, and print it if desired.
3. To return to this screen, simply close the National Rate Calculator window by clicking 'X' in the upper right corner.

If you have issued a CPL previously in the file, the property information will be completed and used to obtain the requested Rate Quote. If this is the first action in the file, the property information must be completed.

Once a property address is inserted – click on the Create Rate Quote button.

A new window will appear with FNTG's National Rate Calculator started.

The Quote Effective Date will default to today's date.

The Property Information and Underwriter will be pulled from your file.

The Order number will contain your file number.

General Info

Amounts

Endorsements

---

Start Over

---

Contact Us

Retrieve a quote:

**General Info**

**Info**

If the State and/or Underwriter you are looking for is not available in the lists below, it is either because this site does not yet support that State/Underwriter or because the Quote Effective Date you entered is not supported. To determine whether the State/Underwriter is supported, enter today's date as the Quote Effective Date.

In some cases, one or more FNF brand underwriters may not do business in a particular county, even though a premium is calculated for that underwriter/county. To find out if an underwriter does business in a county, **contact a local office.**

We apologize for any inconvenience this may cause you. For more information, please contact your local closing or title office.

**Quote Effective Date:**

Property Location: State\*

Property Location: County

Underwriter:

Order Number:

To ensure an accurate rate quote, please verify that the Quote Effective Date is correct.

Title charges in this state are the same in every county.

[\\*Click here to view the status of states not listed.](#)

Once all information is verified correct – click on the Next button.

Answer all presented questions in the Amounts, Owners Policy and Loan Policy sections

**Amounts**

Transaction Type?	<input type="text" value="Property Purchase (with or without financing)"/>
Purchase Amount/Value of Property?	<input type="text" value="\$250,000.00"/>
Amount of Loan #1	<input type="text" value="\$125,000.00"/>
Amount of Loan #2	<input type="text"/>
Amount of Loan #3	<input type="text"/>
Amount of Loan #4	<input type="text"/>
Amount of Loan #5	<input type="text"/>
Property Type	<input type="text" value="Residential"/>
Is this transaction eligible for the Concurrent Owner's & Mortgage rate?	<input checked="" type="radio"/> Yes <input type="radio"/> No <a href="#">More Info</a>
Is this transaction eligible for the Reissue Rate?	<input type="radio"/> Yes <input checked="" type="radio"/> No <a href="#">More Info</a>
Is this property a Timeshare?	<input type="radio"/> Yes <input checked="" type="radio"/> No

**Owners Policy Questions**

Which Policy Form are you using?	<input type="text" value="ALTA Owner's Policy with Florida Modific..."/>
Is this policy eligible for the New Home Purchase Discount?	<input type="radio"/> Yes <input checked="" type="radio"/> No <a href="#">More Info</a>

**Loan 1 Questions**

Which Policy Form are you using?	<input type="text" value="ALTA Loan Policy with Florida Modifications"/>
Enter the premium charge for the amount of Loan liability up to the amount of Owner's liability	<input type="text" value="\$25.00"/>

Next, click on the Endorsements button and select the all applicable endorsements.

- Florida Form 9 - Restrictions, Easements and Minerals
- SE-108 - Change of Partners, Members or Shareholders
- SE-109 - Florida Form 8.1 Environmental Lien
- Additional Interest
- Assignment of Mortgage
- Balloon Mortgage
- Change of Partners (Fairways)
- Construction Loan Up-Date
- Contiguity Endorsement
- Florida Master Endorsement
- Mortgage Modification and/or Future Advance Endorsement
- Navigational Servitude
- Policy Modification
- Reverse Mortgage
- Revolving Credit
- Shared Appreciation
- Survey

[Back to top](#)

Finish

Finish and Print

Once all endorsements have been selected, and any additional required information completed, click on the Finish button.

To return to the Document Generator application, simply close the NRC window by clicking on the X located in the upper right hand corner.

To save the Quote to your file, be sure to click on the Save Rate Quote Button.



You will now see the Rate Quote saved to your file as follows:

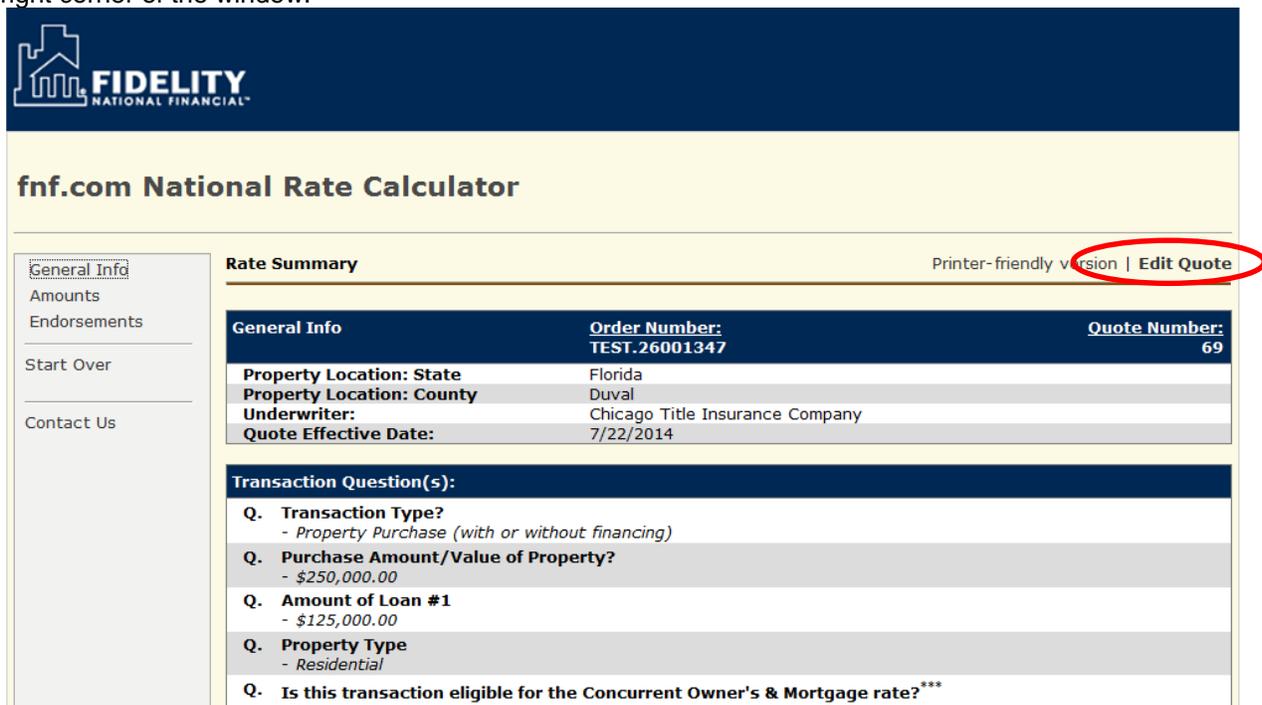
File Number	Property Address
TEST	1820 Smith St Jacksonville FL 32254

Document View/Print	Insured Name	Form Name	Status	Last Modified (EST)	Recipient Type	Action
<a href="#">69</a>		Rate Quote	Active	7/22/2014 1:35:33 PM		  
<a href="#">26000556</a>	Fidelity	Standard CPL	Active	6/2/2014 12:17:17 PM	Lender	  

You have the ability to Edit the quote by selecting the edit icon located to the right of the Rate Quote form.

The NRC window will open to the applicable quote. Select the Edit Quote option located in the upper right corner of the window.



**fnf.com National Rate Calculator**

Printer-friendly version | **Edit Quote**

General Info	Order Number:	Quote Number:
	TEST-26001347	69
Property Location: State	Florida	
Property Location: County	Duval	
Underwriter:	Chicago Title Insurance Company	
Quote Effective Date:	7/22/2014	

**Transaction Question(s):**

- Q. Transaction Type?  
- Property Purchase (with or without financing)
- Q. Purchase Amount/Value of Property?  
- \$250,000.00
- Q. Amount of Loan #1  
- \$125,000.00
- Q. Property Type  
- Residential
- Q. Is this transaction eligible for the Concurrent Owner's & Mortgage rate?\*\*\*

Make any desired edits, click on Finish and then close the NRC window. The newly edited quote will be saved to your file.

If you wish to view your Rate Quote, click on the Rate Quote id located to the left of the document grid.

File Number	Property Address
TEST	1820 Smith St Jacksonville FL 32254

Document View/Print	Insured Name	Form Name	Status	Last Modified (EST)	Recipient Type	Action
69		Rate Quote	Active	7/22/2014 1:35:33 PM		

If you wish to remove the Rate Quote from your file, click on the VOID icon located to the right of the document grid. This will remove the link to the quote in NRC. However, it will not remove the quote from the NRC itself.