



## Table of Contents

Adding a Folder to a User Tree.....	3
Adding a new folder: .....	3
Copying a folder from the SoftPro tree:.....	3
Adding a Document to a User Tree .....	4
Copying a document from the SoftPro tree: .....	4
Deleting a Document in the User Tree.....	4
Viewing and Editing Document Properties in the User Tree.....	5
To view document properties:.....	5
To edit document properties: .....	5
How to use the Import/Export Utility .....	6
Exporting tables from the .mdb file: .....	6
Importing rates using a .txt file: .....	6
Title Insurance Rates in the Look-up Tables .....	8
Deleting title insurance rates from the Underwriter/Policy Look-up table:.....	8
Using the Tax Screen Proration Calculators on HUDs and CDFs .....	9
Using Prorations on HUDs .....	10
Debit from Buyer(s) and Credit to Seller(s), can be found on lines 109/110 .....	10
Credit to Buyer(s) and Debit from Seller(s), can be found on lines 213/214 .....	10
Split a fee and having both Buyer(s) and Seller(s) pay their prorated amount and cut a check to the Payee .....	11



Using Prorations on CDFs .....	11
Debit from Buyer(s) and Credit to Seller(s), can be found in Section K on Page 3 of the CDF .....	11
Credit to Buyer(s) and Debit from Seller(s), can be found in Section L on Page 3 of the CDF .....	12
Second and Third Loans on HUDs .....	13
Earnest Money Deposits .....	14
Entering Earnest Money Deposit .....	14
Earnest Money held by Broker .....	14
Broker bringing all of the Earnest Monies to closing: .....	14
Broker is Retaining Earnest Money which is more than their Commission, paying difference directly to Seller.....	14
Entering Recording Fees on a HUD .....	15
Entering City/County and/or State Tax Stamps on a HUD.....	16
Entering Recording Fees on a CDF .....	17
Entering City/County and/or State Tax Stamps on a CDF .....	18
Policy Premium, Dates, & Numbers on a HUD.....	19
Policy Premium, Dates, & Numbers on a CDF .....	20
How to Create a CPL using 360.....	21
How to Void or Edit a CPL using 360.....	21
Using the Hot Spotting functionality in ReadyDocs.....	22



## Adding a Folder to a User Tree

---

You can add folders to a User tree to organize your documents or reports any way you like. You can copy a folder and all its contents from the SoftPro tree.

### Adding a new folder:

1. Click on Tools in the Menu Bar
2. Click on ReadyDocs Manager
3. Select a folder in the User tree. The new folder will be placed inside (below) the folder you select.
2. Click **Insert New Folder**. A folder named **New Folder** will appear. A text box will appear around the **New Folder** name.
3. Enter a name for the folder in the text box. **NOTE:** You do not have to name the folder at this point. You can always rename a folder.
4. Press **Enter**. Select the folder and use the **Up** arrow button to position it where you want.

### Copying a folder from the SoftPro tree:

1. Select the folder that you want to copy in the SoftPro tree. Select the folder by clicking its name or folder icon . The folder will become highlighted when it is selected.
2. Click the **Copy** button.
3. Click the destination folder in the User tree.
4. Click the **Paste** button.

When you copy a folder from the SoftPro tree to the User tree, all of the contents of the folder will come with it.

**TIP:** In addition to creating your own folders using the **Insert New Folder** button, you can drag-and-drop an entire folder from the SoftPro tree to the User tree.

1. Click the folder you want in the SoftPro tree.
2. Drag it to the destination folder while holding the mouse button down.
3. Release the mouse button when the destination folder becomes highlighted.

When you copy a folder from the SoftPro tree to the User tree, all of the contents of the folder will come with it. After dropping the folder, select the folder and use the **Up** arrow button to position it where you want it.



## Adding a Document to a User Tree

---

There are two ways to add a document to a User tree. You can copy a document from the SoftPro tree, or use the Insert Document button. After adding a document to a folder in the User tree, you can position it where you want it in the folder using the **Up** and **Down** buttons.

### Copying a document from the SoftPro tree:

1. Select the document that you want to copy in the SoftPro tree. Select the document by clicking its name or document icon. The document will become highlighted when it is selected.
2. Click the **Copy** button.
3. Click the destination folder in the User tree.
4. Click the **Paste** button. The document will appear inside (below) the folder. If there are other documents in the destination folder, the new document will be placed at the bottom of the list. Select the document and click the **Up** button to position it where you want it in the folder.

**TIP:** Instead of using the **Copy** and **Paste** buttons, you can drag-and-drop a document from the SoftPro tree to a folder in the User tree. If there are other documents in the destination folder, the new document will be placed at the bottom of the list. Select the document and click the **Up** button to position it where you want it in the folder.

## Deleting a Document in the User Tree

---

1. Browse for and select the document you want to delete.
2. Click **Delete**. A warning message displays.
3. Click **Yes** to delete the document.

**NOTE:** Other copies of the document elsewhere in the User tree will not be deleted. Only the copy you select will be deleted.



## Viewing and Editing Document Properties in the User Tree

---

Each document in the User tree has three properties that can be viewed or edited:

- **Document Name:** The name of the document that appears in the User tree.
- **Document Path:** The drive, directory, and folder in which the document file is stored on the computer.
- **Document Type:** The security assignment for a document. Select **Unrestricted** if access to a document is not to be limited. Otherwise, select the tab or ProForm component that the document is to be associated with (Order Tracking, Title Insurance, HUD-1 & Closing, NC Bar Forms, Truth-in-Lending, and Greatland/State Documents).

If the associated tab or component is disabled on the ProForm **Preferences** dialog box, the document will be [restricted](#). You cannot view or print restricted documents.

### To view document properties:

1. Browse for and select the document in the User tree.
2. Click **Properties**. A **View Properties** dialog box displays listing the document name, path, and type.
3. Click **OK** to close the **View Properties** dialog box.

### To edit document properties:

You cannot edit the properties of any document in the SoftPro tree. To edit the properties of a document, you must copy it to the [User tree](#) and click edit.

1. Browse for and select the document in the User tree.
2. Click **Edit**. The **Edit Properties** dialog box displays listing the document name, path, and type.
3. Edit the properties as necessary.
4. Click **OK** to close the **Edit Properties** dialog box.



## How to use the Import/Export Utility

---

You can export tables from your .mdb file to create a .txt or import file by using the lkupimex.exe.

### Exporting tables from the .mdb file:

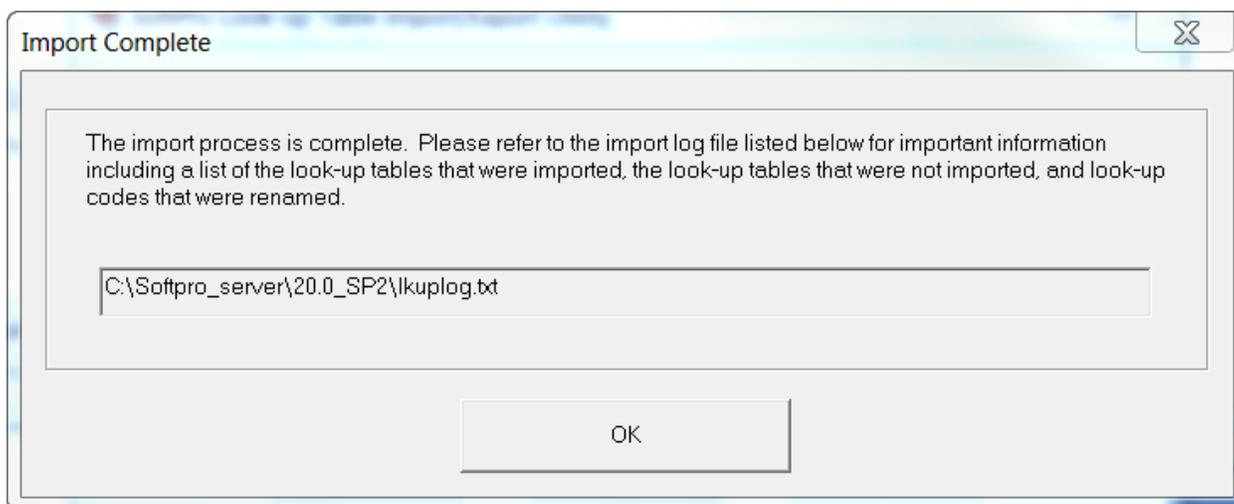
1. Find the lkupimex.exe in your program folder (i.e. C:\Program Files (x86)\SoftPro20.0\_SP2).
2. Double click on the lkupimex.exe file to run it.
3. Click on the “Export Look-up Tables to a file” and click “OK”.
4. Select your Export Type – HUD, GFE or CDF – from the drop down list and click “OK”.
5. Choose the tables that you wish to export: COUNTY, DISLKUP, LPRTLKUP AND POLCLKUP and click “OK”.
6. At this point, it will ask you where you want to save the .txt file. Save it to your computer in a location of your choice.

---

You can import rates, requirements and exceptions into your .mdb file (database) by using the lkupimex.exe.

### Importing rates using a .txt file:

1. Find the lkupimex.exe in your program folder (i.e. C:\Program Files (x86)\SoftPro20.0\_SP2).
2. Double click on the lkupimex.exe file to run it.
3. Choose “Import Look-up Tables from a file” and click “ok”.
4. Browse to the .txt file that you wish to import and highlight that .txt file.
5. Click “Open”. The import process will run and you will get the message below:



6. Click “ok”. If you have additional .txt files to import, follow the same procedure above. If you don't have additional .txt files that you wish to import, click “Cancel” in the SoftPro Look-up Table Import/Export Utility.



Once you have imported your .txt files, you will make sure that your files imported properly:

7. Go to the root of SoftPro (i.e. C:\Softpro\_server\20.0\_SP2) and view the lkuplog.txt to make sure that everything imported properly.

**Note: Be aware of the following message:**

Look-up Table: COUNTY

Database Table: COUNTY

Number of Records Imported: 47

Columns Not Imported. The following columns exist in the database table being imported but not in the target database table:

1204SlrPay

1204PayTo

1205Desc

1205SlrPay

1205PayTo

This may mean that data did not transfer over correctly. (Possibly the structure wasn't updated?)

**On the other hand, if you see this:**

Look-up Table: POLCLKUP

Database Table: UNDERWRITER\_POLICYCODE

Number of Records Imported: 17

Columns Not Imported. The following columns exist in the database table being imported but not in the target database table:

LP\_BaseCoverageOn\_2

LP\_RateTable\_2

LP\_MultiplierPct\_2

LP\_PlusMinusAmount\_2

LPSplit\_RateTable\_2

LPSplit\_MultiplierPct\_2

LPSplit\_PremiumTo\_2

LP\_BaseCoverageOn\_3

LP\_RateTable\_3

LP\_MultiplierPct\_3

LP\_PlusMinusAmount\_3

LPSplit\_RateTable\_3

LPSplit\_MultiplierPct\_3

LPSplit\_PremiumTo\_3

This is because the text file was created from an earlier version of SoftPro (before we added 2<sup>nd</sup> & 3<sup>rd</sup> Screens/fields). This is something that you won't need to worry about.



## Deleting Title Insurance Rates in the Look-up Tables

---

You can delete rates that are not necessary in a database from the lookup tables in ProForm.

### Deleting title insurance rates from the Underwriter/Policy Look-up table:

1. Go to the Policy Premium, Dates, & Number screen in ProForm.
2. Press F9 in the Underwriter/Policy Look-up Code field.
3. Highlight the Policy that you wish to delete by clicking in the column to the left of the policy type that you wish to delete so that the entire line item is highlighted.
4. Click on the Delete Entry button in the list of buttons at the bottom of the screen.

**Note: Do NOT press the Delete Table button. (This will delete the entire table that you are working in.)**

5. Click on the Close button in the list of buttons at the bottom of the screen.



## Using the Tax Screen Proration Calculators on HUDs and CDFs

---

HUD: Using the City/Town Taxes (Screen 1), County Taxes (Screen 2), and Assessments (Screen 3) will allow you to prorate the Buyer(s) and Seller(s) portions of taxes and send the amounts to the CDF.

CDF: Using the City/Town Taxes (Screen 6), County Taxes (Screen 7), and Assessments (Screen 8) will allow you to prorate the Buyer(s) and Seller(s) portions of taxes and send the amounts to the CDF.

To make this screen prorate correctly you must have three things entered:

1. Status of Current Period Taxes
  - a. Click on the radio button to state the status of the tax payment for time of closing:
    - i. To be Paid by Buyer will give a credit to the Buyer(s) from the Seller(s)
    - ii. Pay/Paid by Seller will debit the Buyer(s) and credit the Seller(s)
2. Current Tax Period from
  - a. This is the full period for which you are prorating off of. If taxes are paid annually, it would show 01/01 Through 12/31. Quarterly would be the beginning date of that quarter (01/01) Through ending date of that quarter (03/31)
3. Real Property Tax Amount
  - a. Enter the amount that the proration is to be based on. That field will be in black text and it will flow down to Total Tax Amount and Escrows to be Based on Tax Amount fields.
    - i. If the Lender would like their escrows to be based on a different amount, the user can type that dollar figure into the Escrows to be Based on Tax Amount field and the escrows section on the HUD/CDF with divide the per month amount off of that amount and not the Real Property Tax Amount.

**NOTE: Please do NOT use the Assessments screen (Screen 3) for anything other than municipality or special taxes. The amounts in this screen will flow to the 1099 if the Status is Pay/Paid by Seller.**



## Using Prorations on HUDs

You can add prorations to certain HUD lines using the proration calculation box.

A screenshot of a software dialog box titled "Proration (2014100013.PFD)". The dialog box has a white background and a blue title bar. It contains several input fields: a dropdown menu, a dollar sign followed by a text box, "From: / /" and "Through: / /" followed by an equals sign and a text box, "Days of: " followed by a text box, a checkbox labeled "30 Day Months", "Which Includes \$:" followed by a text box, and "That" followed by two radio buttons labeled "Buyer" and "Seller", and the text "Must Pay".

There are three (3) options when using the proration box:

1. Debit from Buyer(s) and Credit to Seller(s), can be found on lines 109/110
2. Credits to Buyer(s) and Debits from Seller(s), can be found on lines 213/214
3. Split a fee and have both Buyer(s) and Seller(s) pay their prorated amounts and cut a check to the Payee.

### Debit from Buyer(s) and Credit to Seller(s), can be found on lines 109/110

There are 2 lines on the HUD that utilize this feature, Lines 109 and 110 on Screen 18: 100 Gross Amount Due from Borrower, located on HUD-1 & Closing Tab

0. Go to the Debit Proration line you would like to calculate the proration.
  1. Type in your line description exactly how you would like it to show up on the HUD.
  2. Enter full amount of charge in the Share of \$: box
  3. Enter the full date range of the charge (i.e. Yearly would be From: 01/01/2015 Through: 12/31/2015)

This will place the prorated portion on the Buyer(s) column and automatically put a credit on the Seller(s) side for that proration.

### Credit to Buyer(s) and Debit from Seller(s), can be found on lines 213/214

There are 2 lines on the HUD that utilize this feature, Lines 213 and 214 on Screen 19: 200s Amounts Paid by or in Behalf of Borrower, located on HUD-1 & Closing Tab

1. Go to the Credit Proration line you would like to calculate the proration.
  2. Type in your line description exactly how you would like it to show up on the HUD.
  3. Enter full amount of charge in the Share of \$: box
  4. Enter the full date range of the charge (i.e. Yearly would be From: 01/01/2015 Through: 12/31/2015)

This will place the prorated portion on the Buyer(s) column and automatically debit the Seller(s) side for that proration.



### Split a fee and having both Buyer(s) and Seller(s) pay their prorated amount and cut a check to the Payee

There are several lines in the 900 and 1300 Section that will take a full charge and prorate both the Buyer(s) and Seller(s) amount and pay the Payee the full amount.

1. Go to the Split Proration line you would like to calculate the proration.
2. Type in your line description exactly how you would like it to show up on the HUD.
3. Enter full amount of charge in the Split \$: box
4. Enter the full date range of the charge (i.e. Yearly would be From: 01/01/2015 Through: 12/31/2015)
5. If needed, enter an additional charge for either the Buyer or Seller to pay on top of the proration

### Using Prorations on CDFs

You can add prorations to any available lines on the Closing Disclosure Form on Page 3 by using the Calculation Type feature.

The screenshot shows a software window titled 'Line Detail (2015110011-CDF.PFD)'. The main window displays 'K. Due from Borrower at Closing' and 'Charges for Line 07'. It has a table with columns for Description, Re, DS, and Borrower. A 'Proration (2015110011-CDF.PFD)' dialog box is open over the table. The dialog box has a dropdown menu for Calculation Type set to 'Proration', a 'Details...' button, and fields for 'From' and 'Through' dates, 'Days of', and '30 Day Months'. It also has a 'Which Includes \$:' field and radio buttons for 'Buyer', 'Seller', and 'Must Pay'.

### Debit from Buyer(s) and Credit to Seller(s), can be found in Section K on Page 3 of the CDF

Any available line can be easily turned into a proration line by clicking on the lines hyperlink and using the Calculation Type feature.

1. Go to CDF Page 3, Section K
2. Choose the line in which you would like to add a proration and click the coordinating hyperlink for that line number to the left of the grid.
3. Under Calculation Type, choose proration and click on the Details button.
4. Choose Computer Buyer's Share of
5. Enter the full amount of charge in the \$ box
6. Enter the full date range of the charge (i.e. Yearly would be From: 01/01/2015 Through: 12/31/2015)
7. Click the grey X to close out of the proration box
8. Choose the Credit/Debit drop down box and pick M.xx (Next available Line)

This will place the prorated portion on the Buyer(s) column and automatically put a credit on the Seller(s) side for that proration.



**Credit to Buyer(s) and Debit from Seller(s), can be found in Section L on Page 3 of the CDF**

Any available line can be easily turned into a proration line by clicking on the lines hyperlink and using the Calculation Type feature.

1. Go to CDF Page 3, Section L
2. Choose the line in which you would like to add a proration and click the coordinating hyperlink for that line number to the left of the grid.
3. Under Calculation Type, choose proration and click on the Details button.
4. Choose Computer Seller's Share of
5. Enter the full amount of charge in the \$ box
6. Enter the full date range of the charge (i.e. Yearly would be From: 01/01/2015 Through: 12/31/2015)
7. Click the grey X to close out of the proration box
8. Choose the Credit/Debit drop down box and pick N.xx (Next available Line)

This will place the prorated portion on the Buyer(s) column and automatically debit the Seller(s) side for that proration.



## Second and Third Loans on HUDs

---

You can enter second and third loans by using the 2<sup>nd</sup> and 3<sup>rd</sup> Loan buttons in the General Screens.

NOTE: Using these buttons will create multiple loans on one HUD, but will allow you to print separate Commitments and create separate Security Instruments.

1. Click the General Tab
2. Double-click Loan, Funding & ProTrust Screen
3. Click on 2<sup>nd</sup> Loan or 3<sup>rd</sup> Loan buttons at the top of the screen



## Earnest Money Deposits

---

General tab, Sales Price, Deposit/Earnest Money screen.

### Entering Earnest Money Deposit

1. Click on the General Tab
2. Double-click Sales Price, Deposit/Earnest Money screen.
3. Enter the amount of the Earnest Money in the Deposit/Earnest Money box.
4. Choose how Earnest Money is being held:
  - a. Incoming Fund will anticipate a third party check on the Disbursement Summary and in your ProTrust Ledger
  - b. Listing Agent; Selling Agent or Seller will automatically reduce the Earnest Money from the funds/proceeds of the holder of the Earnest Money
  - c. Settlement Agent will anticipate your office to receipt in the Earnest Money into your Ledger

### Earnest Money held by Broker

#### Broker bringing all of the Earnest Monies to closing:

If contract originally had the Broker holding the Earnest Money, but at closing they brought the full Earnest Money to the closing:

1. Click on the General Tab
2. Double-click Sales Price, Deposit/Earnest Money screen
3. Change the Deposit Retained by or Already Received by to Incoming Fund

This will anticipate a deposit to come into your account instead of reducing commission of a Broker.

#### Broker is Retaining Earnest Money which is more than their Commission, paying difference directly to Seller

If Broker is retaining the Earnest Money which is more than the amount of commission and they are going to give the difference directly to the Seller:

1. Click on the General Tab
2. Double-click Sales Price, Deposit/Earnest Money screen
3. Enter the total commission amount for that Broker in the Portion of Deposit Retained field
  - a. On a HUD: If the Broker is giving the difference directly to the Seller (rather than through the Settlement Agent), you must enter the amount of the excess deposit on line 501.

**NOTE:** On a CDF, this will automatically push the difference given to Seller on Line N.01.





## Entering City/County and/or State Tax Stamps on a HUD

This charge is based upon the formulas configured in the Recording & Transfer Fee Formulas within the 1200 Section Formulas box on 1200s Gov't Recording & Transfer Charges (Screen 12) on the HUD-1 & Closing Tab.

1. If the HUD does not show any figures in 1202 or 1203 automatically and Tax Stamps are applicable:
  - a. Check the 1200 Section Formulas box to see if any figures are in red text in the 1202 Deed or Mortgage boxes and/or 1203 Deed or Mortgage boxes. If Tax Stamps are not automatically pulling in:
    - i. Go to the 'City of' or 'County of' box in the Property screen.
    - ii. Press F9.
    - iii. Choose City or County from Table if individually listed or the State Structure.  
**Note:** If choosing the State Structure, they will then just override the name of the County to match the County of the Property.
    - iv. Go back to the 1200 Gov't Recording & Transfer Charges screen and click on the 1200 Section Formulas box to see if the recording formulas filled in
2. You can manually enter the Tax Stamps directly on the lines, under their applicable Tax Stamp type

**NOTE:** If Seller is paying these Tax Stamps, be sure that 100% is placed in the SlrPay box by each Tax Stamps.

<b>1202</b> City/County Tax/Stamps	Deed - POC: <input type="checkbox"/>	\$	225.70	SlrPay: <input type="checkbox"/>	%	225.70	
	Mortgage(s) - POC: <input type="checkbox"/>	\$		SlrPay: <input type="checkbox"/>	%	TIL: <input type="text"/>	
DS: <input type="text"/>	To: Register of Deeds	Re:				More...	
<b>1203</b> State Tax/Stamps	Deed - POC: <input type="checkbox"/>	\$		SlrPay: <input type="checkbox"/>	%	66.59	
	Mortgage(s) - POC: <input type="checkbox"/>	\$	66.59	SlrPay: <input type="checkbox"/>	%	TIL: <input type="text"/>	
DS: <input type="text"/>	To: Register of Deeds	Re:				More...	



## Entering Recording Fees on a CDF

---

This charge type is based upon the formulas configured on the Recording & Transfer Tax Formulas screen (Screen 18) on the CDF tab.

1. Click CDF Tab
2. Double-click on CDF Page 2 (Screen 2)
3. Click on the hyperlink to line E.01
4. Click on Details button beside Calculation Type: Recording Fee
5. Choose your Document Type to be Deed/Mortgage/Release
6. Put in your amount of Pages in the Pages column, this should automatically fill in the amount in the Total column.
  - i. If your Total column does not automatically pull in:
    - a. Go to Recording & Transfer Tax Formulas (Screen 18), on CDF tab.
    - b. If that screen is blank, the user may not have used the Lookup Table in the Property Screen, General Tab, in the 'County of' field or 'City of' field, depending on the Government Recording Structure.
    - c. Go to the 'City of' or 'County of' box in the Property screen.
    - d. Press F9.
    - e. Choose City or County from Table if individually listed or the State Structure. **Note:** If choosing the State Structure, they will then just override the name of the County to match the County of the Property.
    - f. Go back to the Recording & Transfer Tax Formulas (Screen 18) and verify the recording formulas filled in

## Entering City/County and/or State Tax Stamps on a CDF

This charge type is based upon the formulas configured on the Recording & Transfer Tax Formulas screen (Screen 18) on the CDF tab.

If the formula has been added to the template, users will see a calculation already populating into Line E.02. If users are not seeing this calculation:

1. Click on the hyperlink for Line E.02
2. Type a description to print on the CDF in the Desc: field
3. Verify that Calculation Type is set to Transfer Tax
4. Click Details
5. Choose Formula to use, including City/County, State, Other 1 or Other 2
6. Choose Document to base the Tax Stamp on: Deed or Mortgage
7. The calculation should automatically show in the Borrower (at Closing) column
  - a. If no calculation is pulling through, verify on Screen 18 Recording & Transfer Tax Formulas where the formula is pulling.

City/County Tax Stamps		Deed	500	
		Mortgage		
State Tax Stamps		Deed		
		Mortgage	1000	
Other Tax Stamps (1)		Deed		
		Mortgage		
Other Tax Stamps (2)		Deed		
		Mortgage		

8. Go back to CDF Page 2, Line E.02 to verify that calculation has pulled through
9. If you need additional Tax Stamp lines, click the <Click to add a row> line and repeat 1-7



## Policy Premium, Dates, & Numbers on a HUD

---

Title Insurance tab, Policy Premium, Dates, & Numbers (Screen 1) or HUD-1 & Closing Tab, 1101-1108 Title Charges (Screen 10).

There are 2 different ways to access the Policy Premium Screen.

Title Insurance Tab:

1. Click the Title Insurance tab.
2. Double-click Policy Premium, Dates & Numbers screen (Screen 1)

HUD-1 & Closing Tab:

1. Click the HUD-1 & Closing tab.
2. Double-click 1101-1108 Title Charges

Once on your Policy Premium screen:

1. Click on the Underwriter/Policy Look-up Code field
2. Press F9
3. Find the correct Policy Code within your Look-up Table.

Note: The look-up table will automatically pull in your split with the Underwriter. Make sure that the Coverage Amounts for the Loan and Owners policy stay in 'Black Text' so if the Loan Amount and/or Sales Price change, it will automatically update and update any premiums



## Policy Premium, Dates, & Numbers on a CDF

---

Title Insurance tab, Policy Premium, Dates, & Numbers (Screen 2) or HUD-1 & Closing tab, 1101-1108 Title Charges (Screen 10).

There are 2 different ways to access the Policy Premium Screen.

Title Insurance Tab:

1. Click the Title Insurance tab.
2. Double-click Policy Premium, Dates & Numbers screen (Screen 2)

HUD-1 & Closing Tab:

1. Click the HUD-1 & Closing tab.
2. Double-click 1101-1108 Title Charges

Once on your Policy Premium screen:

1. Click on the Underwriter/Policy Look-up Code field
2. Press F9
3. Find the correct Policy Code within your Look-up Table.  
Note: The look-up table will automatically pull in your split with the Underwriter. Make sure that the Coverage Amounts for the Loan and Owners policy stay in 'Black Text' so if the Loan Amount and/or Sales Price change, it will automatically update and update any premiums
4. Show Full loan premium on CDF will automatically be checked off when the file is a CDF file, however if you see this unchecked please be sure to recheck it so that it will accurately reflect the premiums pursuant to the new CFPB regulations.



## How to Create a CPL using 360

---

A CPL can easily be created by using SoftPro 360 and AgentTrax. Navigate to: Services, Underwriter Services, FNTG – AgentTrax

1. With your file in ProForm open, go to Services in the top menu bar
2. Click on Underwriter Services
3. Click on FNTG – AgentTrax
4. Verify that the order in which you need the CPL is highlighted in the Order Linking box and click OK
5. AgentTrax Login page will open, enter your current User ID and Password
6. Highlight your company and underwriter that you are using in the Company/Underwriter Selection box, click Next to continue
7. Click the Add CPL(s)
8. If applicable, select any DBA, Legal Name or Both, Click OK
9. Choose the Type of CPLs that you want on the Letter Selection screen, Click Next
  - a. The Approved Attorney screen will appear when the attorney link is clicked in the Lender Selection. Once selected, the address and any DBA will be available to be checked. Once Complete Click OK
10. Verify all information that pulls into the CPL Information screen. All fields are editable, however will not be saved back to your ProForm order. Once all fields have been review/updated, click Submit to continue
11. Once the CPL has been processed, a Review screen will pop up, click Accept to add the CPL(s) back into your ProForm Order.
12. To view or print the CPL(s), click on the SPIImage icon  in your toolbar at the top of your ProForm.

## How to Void or Edit a CPL using 360

---

A CPL can easily be edited or voided if it is in Active Status.

1. Follow the login steps above
2. Highlight the CPL which you need to edit, void or reinstate and click Edit/View
3. The CPL Summary screen will be displayed, click Edit or Void
4. Make corrections to the fields that are editable and Click Submit to continue



## Using the Hot Spotting functionality in ReadyDocs

---

Using the ReadyDoc folders to the right of your File/Order tabs will allow you to put that specific document into Review mode (DocChek). This feature activates the ability to Hot Spot onto a certain piece of data on that document and when double-clicked, it will take you directly to the field where that text or number originated. A Hot Spot is any data that is in blue text or a red arrow on your pointer.

To edit data using Hot Spotting:

1. Double-click the document you want in the ReadyDocs window. The ReadyDoc selected will open on top of your ProForm desktop/file.
2. When you find something that needs to be edited or if you would like to see where that data is pulling from, Double-click on that area and the document will take you directly to the field where that information is pulling from.
3. Edit that data and press Esc to close that ProForm screen and it will return you to the ReadyDoc with the newly edited data.