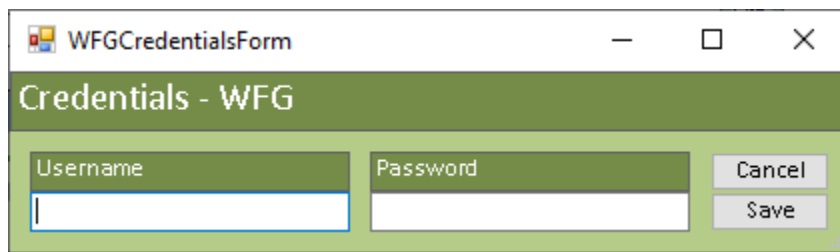


Williston Financial Group (WFG)

How-To Guide

Credentials

The first time you try to make an EJacket or a CPL you will be forced to enter your credentials. This is the same as the credentials you use to log into WFG's website. One set of credentials is saved per TrackerPro user per installation.

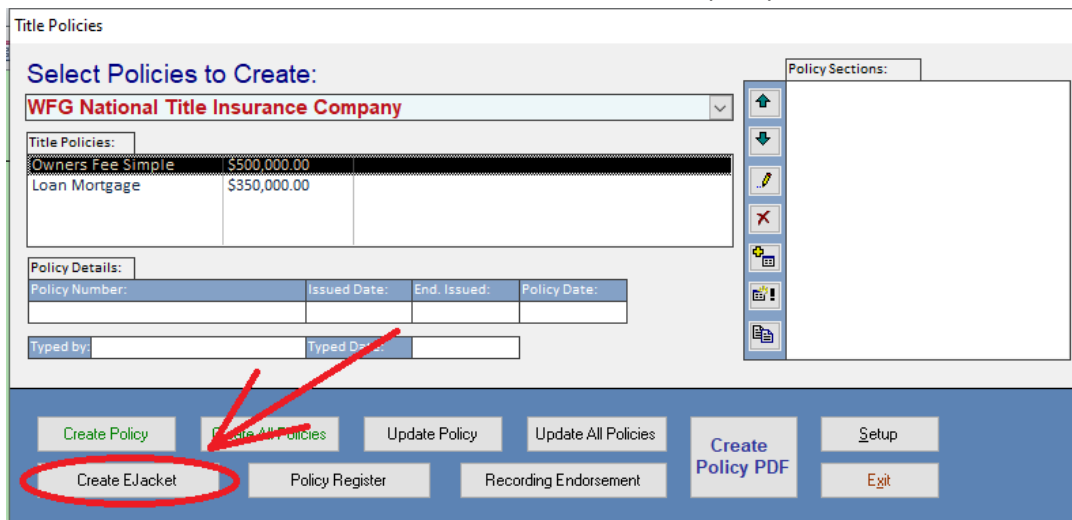


The screenshot shows a window titled "WFGCredentialsForm" with a green header "Credentials - WFG". It contains two input fields: "Username" and "Password". To the right of these fields are two buttons: "Cancel" and "Save".

You are now ready to make CPLs and EJackets. The process for each is very straightforward, and a full explanation is shown in this guide.

EJackets

- 1) To make an EJacket, click the Create EJacket button from within the Title Policy Documents window of TrackerPro. This will create the EJacket for the selected policy.



The screenshot shows the "Title Policies" window in TrackerPro. The window has a header "Select Policies to Create:" and a dropdown menu set to "WFG National Title Insurance Company". Below this is a table with two rows:

Title Policies:		
Owners Fee Simple	\$500,000.00	
Loan Mortgage	\$350,000.00	

Below the table is a "Policy Details:" section with fields for "Policy Number:", "Issued Date:", "End. Issued:", and "Policy Date:". There are also "Typed by:" and "Typed Date:" fields. On the right side, there is a "Policy Sections:" section with a list of sections and a toolbar with icons for up, down, edit, delete, add, and print. At the bottom of the window, there is a blue bar with several buttons: "Create Policy", "Create All Policies", "Update Policy", "Update All Policies", "Create Policy PDF", "Setup", "Create EJacket", "Policy Register", "Recording Endorsement", and "Exit". The "Create EJacket" button is highlighted with a red circle, and a red arrow points to it from the "Create All Policies" button.

- The WFG Ejacket Step 1 form will open. Assuming you've previously entered your Username and Password, you will only need to select your Agent and Jacket Type. TrackerPro will attempt to automatically select the Jacket Type, but you may need to adjust this on certain files. Each Agent is authorized to order Ejackets and CPLs for specific states. Once selected, the Agent can be saved as the default for the current file's state by clicking the Default button. Once Agent and Jacket Type are selected, you can click Continue to move onto step 2.

WFG Ejacket Step 1

EJacket - WFG - Step 1 User Guide

Title Number	ABC1988	Username	CplWebTestAcct	Password	*****	Edit
						Save
State	New York	Agent	Please Choose	Default		
Jacket Type	ALTA Loan Policy					

Cancel Continue

- The WFG Ejacket Step 2 form will open. The fields will populate automatically from other sections of TrackerPro. If some information does not match up exactly to a choice from WFG, such as the lender's Insured Clause or an Endorsement, you will receive a pop-up warning about it and the field will display as "Please Choose". You will have the choice to manually select a choice in the drop-down menu or submit the order without said Insured Clause or Endorsement.

WFG Ejacket Step 2

EJacket - WFG - Step 2 User Guide

Statistical Code	231 - Full Rate - Mortgage Policy - Issued Alone (Refi Or Subordinate Not Eligible for Discount)				
Insured Clause	its successors and/or assigns, as their interests may appear				
Liability Amount *	\$350,000.00	Policy Date *	3/27/2020	Mortgage Date	3/27/2020
Policy Premium	\$1,487.00	Policy Time	08:00 AM	Mortgage Amount	\$350,000.00
Loan Number	123456789				
Address Line 1	123 Colon Avenue				
Address Line 2		County	Nassau		
City	Westbury	State	NY	Zip	11590
Property Type *	Residential				

Parties	Name	Type	Action
	Owen Owner	Owner	Add
	Bank of America	Lender	Remove
			Up
			Down

Endorsements	Name	Type	Premium
	Standard New York Endorsement Loan	Standard New York Endorsement (Loan Policy)	
	Residential Mortgage Endorsement	Residential Mortgage Endorsement (1 to 4 Family)	
	Waiver of Arbitration Endorsement Loan	Waiver Of Arbitration Endorsement	
Endorsement	Standard New York Endorsement (Loan Policy)	Premium	\$0.00
Exception			

Cancel Download Now

* Indicates a required field

- 4) Note that while you can type anything they want into these fields, our suggestion is always to enter the correct information into the proper area of TrackerPro. This way, when you open the EJacket form, it will automatically pull in the correct values. **If you adjust something in the EJacket window it will not go sync back into any other area of TrackerPro. It will only be used for this one-time EJacket.**
- 5) When you click Download Now, the EJackets will be saved in the File Cabinet. It will also be added to the Title Policy Sections so it is automatically included when you view or print the Title Policy and the Policy Numbers will be saved into TrackerPro.

CPLs

- 1) To make a CPL, click the appropriate button within the Edit Transactions Window while a Loan Policy is selected. This button would be labelled Closing Protect Letter or Agent Letter, depending on the state. CPLs are only generated on Loan Policies.

Edit Title Insurance Policies

Title Policies:				Endorsements:	
Owners Policy	\$500,000.00	Fee Simple	\$2,033.00	Standard New York Endorsement	\$0.00
Loan Policy	\$350,000.00	Mortgage	\$446.00	Residential Mortgage Endors	\$50.00
				Waiver of Arbitration Endors	\$50.00

Options applicable to the Selected Policy:		Options applicable to the Application:	
Policy Amount	\$350,000.00	Owners Policy Premium(s)	\$2,033.00
Policy Type	Mortgage	Loan Policy Premium(s)	\$446.00
Policy Premium	\$446.00	Total Endorsements	\$303.00
Policy Note		Prior Insurance for discounted rates	
Simo. Loan covers extra property	Not Applicable	Bulk Rates Apply	Not Applicable
Loan Number	123456789	Edit NYC Tax Aggregation	
Remittance Code	315	Invoice Remarks	
Contract Vendee or Option Premium Credit			
Closing Service Letter ID			
Taxable Amount (or New Money for CEMA)			
Existing Balance			
Mortgage Tax Options	Default		
WIS Transfer Tax Calc. Method for	Default (by Effective Date)		
State Transfer Tax Options			
State Special (Mentioned) Options			
Local Transfer Tax Options			

Agent Letter Rate Manual Cancel Exit

Rates Effective As Of: 2/15/2019 Calculation Effective Date As Of: 3/27/2020

- 2) The WFG Closing Protection Letter Step 1 form will open. The CPL system uses the same saved credentials as the EJacket system. Assuming you've previously entered your Username and Password you will only need to select Agent and Letter Type. If you've previously set an Agent as Default for this state (the CPL system uses the same Default Agent as the EJacket System), you will only need to verify the Letter type is correct and then click Continue.

WFG Closing Protection Letter Step 1

Closing Protection Letter - WFG - Step 1 [User Guide](#)

Title Number	ABC1988	Username	CplWebTestAcct	Password	*****	Edit
						Save
State	New York					
Agent	Test agent 2 - 11636.01.01.31.NY / Portland, OR (Active)			Default		
Letter Type	NY Authorization Letter					

Cancel Continue

- 3) The WFG Closing Protection Letter Step 2 form will open. The Attorney dropdown contains a list provided by WFG. When an attorney is selected, TrackerPro will query WFG's system for detailed information for the chosen attorney which is displayed in the bottom fields and cannot be modified. You can manipulate this attorney list by logging into WFG's website.

Important Note: Both the dropdown list of attorneys and any individual attorney details are cached by TrackerPro for one day to improve the speed of ordering subsequent CPLs that day. If you need to add a new attorney or modify an attorney from the list and order a CPL with the new or modified attorney, you should also order the CPL via the website. After a 24-hour period passes, TrackerPro will refresh the cached attorney information the next time you open this CPL form and the drop-down should include the changes you made to the attorney list.

WFG Closing Protection Letter Step 2

Closing Protection Letter - WFG - Step 2 User Guide

Liability Amount	\$350,000.00	Loan Number	123456789
Property Type *	Residential		
Address Line 1 *	123 Colon Avenue		
Address Line 2			
City *	Westbury	State *	NY Zip * 11590

Lender	Bank of America		
Company Name *	Bank of America	Attention	
Mortgagee Clause	its successors and/or assigns, as their interests may appear		
Address Line 1 *	175 Pinelawn Road	Phone	
Address Line 2		Fax	
City *	Melville	State *	NY Zip * 11747 Email

Borrower(s) *	Bob Buyer	Buyer	<input type="button" value="Add"/> <input type="button" value="Remove"/> <input type="button" value="Up"/> <input type="button" value="Down"/>	
	Bindy Buyer	Buyer		
	Betty Buyer	Buyer		
	Name	Bob Buyer	Type	Buyer

Attorney	Adam L. Hall - Browder, Overby, Hall & Michaud, PA - 153A Jefferson Church Road, King, NC 27021		
Full Name	Browder, Overby, Hall & Michaud, PA	Law Firm Name	Adam L. Hall
Address Line 1	153A Jefferson Church Road	Phone	336-983-6084
Address Line 2		Fax	8005070164
City	King	State	NC Zip 27021 Email edin.spjodic@authoritypartners.com

* Indicates a required field

- 4) All the remaining fields will populate automatically from various other sections in TrackerPro. While you can type anything you want into these fields, our suggestion is always to enter the correct information into the proper area of TrackerPro. This way, when you open the CPL form, it will automatically pull in the correct. **If you adjust something in the CPL window it will not sync back into any other area of TrackerPro. It will only be used for this one-time CPL.**
- 5) When you click Download Now, the CPL will be generated and saved in the File Cabinet. You can then send the letter out as needed using any of the standard TrackerPro methods.