



## **Welcome to WFGAgent!**

The revamped, supercharged Agent Management System (AMS2) we told you about is up and running! It's everything we described — faster, more efficient and user-friendly — an enhanced version of the AMS you've been using, with more functionality and time-saving features we think you'll appreciate.

The attached job aids describe the new features and explain how to use them. Your password for the existing platform will also work for the new one. For now, you can use the old AMS, but give the new AMS a try! You can access it at <http://www.wfgsecure.com/AMS2>.

The flexible system provides you with three possibilities for creating your CPL and eJacket services.

- 1)** You can create a CPL or eJacket as a stand-alone function in AMS2. Once the CPL or Jacket is generated, a new file will be created, allowing you the option to create further services from the new file.
- 2)** You can create a file now and add services at a later time.
- 3)** You can still utilize your production system to create eJackets and/or CPLs. The only time you would need to access AMS2 is to cancel the file and the services that you created from your production system.

The navigation is easy! Functions are user-friendly! The information is comprehensive and most important, the site is yours. Explore it. Explore it some more. Use it. If you have any questions or any problems logging on, contact Agency Support at [agencysupport@willistonfinancial.com](mailto:agencysupport@willistonfinancial.com) or **1-877-840-0841** for help.

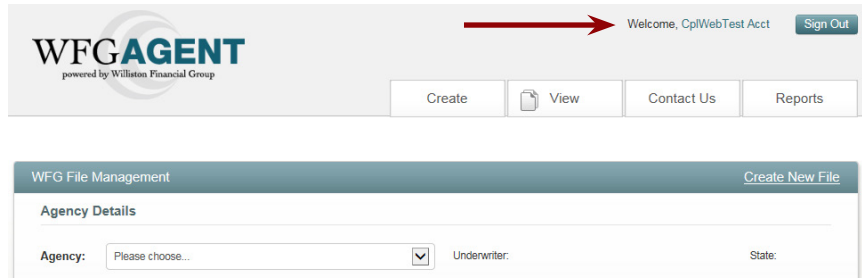
## Adding a CPL or eJacket to a file

The purpose of this document is to provide step-by-step instructions to add a CPL or eJacket to an existing file.

### 1. Logging In

In your web browser, go to **<https://wfgsecure.com/AMS2>**. Once you arrive at the log in page, use your current credentials to sign in.

*Note: Once you have logged in for the first time, you will be able to change your assigned password. In the upper right-hand corner, click on the hyperlink for your name. You will be directed to the Change Password page.*

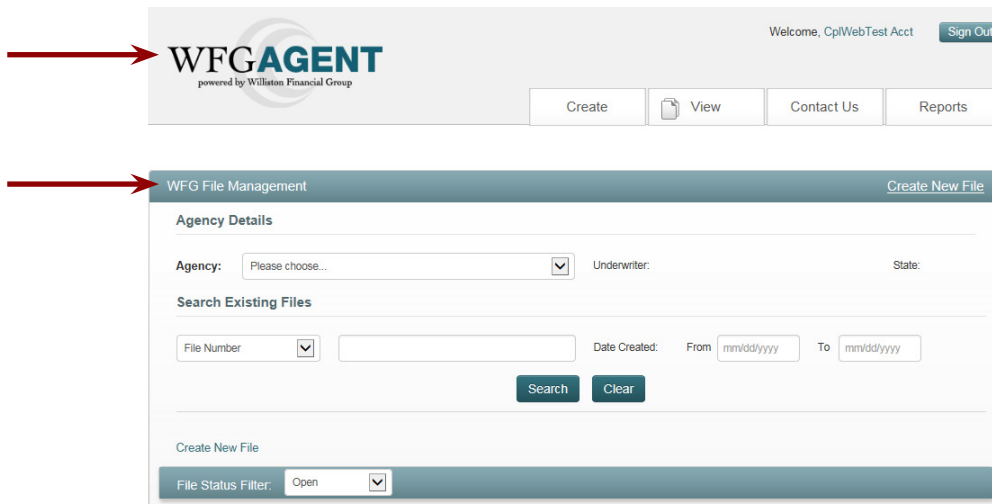


The screenshot shows the WFGAGENT login page. At the top left is the WFGAGENT logo with the text "powered by Williston Financial Group". To the right of the logo is a red arrow pointing to the text "Welcome, CplWebTest Acct" and a "Sign Out" button. Below the logo is a navigation bar with buttons for "Create", "View", "Contact Us", and "Reports". The main content area is titled "WFG File Management" and includes a "Create New File" link. Under "Agency Details", there is a dropdown menu for "Agency" (currently showing "Please choose..."), a text field for "Underwriter", and a text field for "State".

### 2. Main Landing

Once logged in, you will see the **WFG File Management** window.

*Note: If at any time you would like to return to this page, you can click the **WFG AGENT** icon in the upper left-hand corner.*

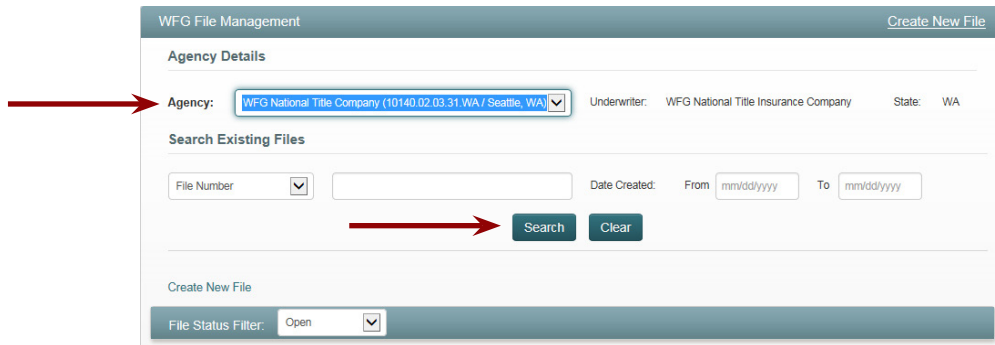


The screenshot shows the WFG File Management main landing page. At the top left is the WFGAGENT logo with the text "powered by Williston Financial Group". To the right of the logo is a red arrow pointing to the text "Welcome, CplWebTest Acct" and a "Sign Out" button. Below the logo is a navigation bar with buttons for "Create", "View", "Contact Us", and "Reports". The main content area is titled "WFG File Management" and includes a "Create New File" link. Under "Agency Details", there is a dropdown menu for "Agency" (currently showing "Please choose..."), a text field for "Underwriter", and a text field for "State". Below this is a "Search Existing Files" section with a "File Number" dropdown menu, a text input field, a "Date Created" section with "From" and "To" date pickers (both showing "mm/dd/yyyy"), and "Search" and "Clear" buttons. At the bottom, there is a "Create New File" section with a "File Status Filter" dropdown menu (currently showing "Open").

### 3. File Management

Once you are viewing the **WFG File Management** window, the agency you have access to will automatically default in the **Agency Tab**.

When you see your agency listed, hit **Search**. This will automatically show all of the open files.



WFG File Management [Create New File](#)

**Agency Details**

Agency: WFG National Title Company (10140.02 03.31 WA / Seattle, WA) ▼ Underwriter: WFG National Title Insurance Company State: WA

**Search Existing Files**

File Number ▼  Date Created: From  To

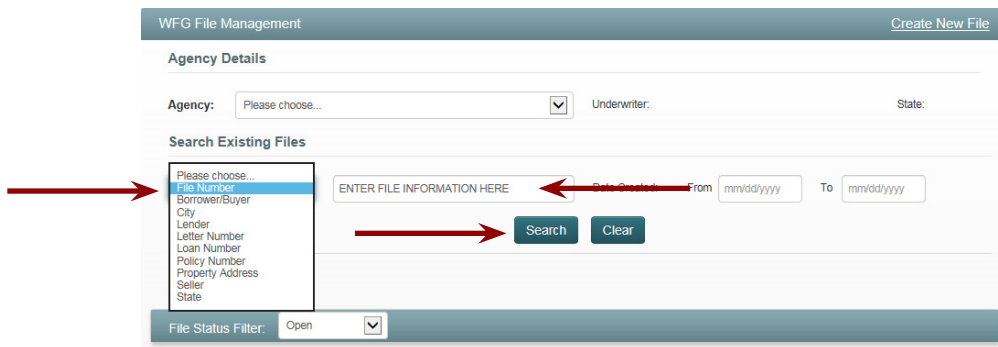
Create New File

File Status Filter: Open ▼

If you would like to search for a specific file you can select any of the available options from the **Drop Down Tab** and then enter the **File Number** in the space provided.

Click **Search**.

*Note: that this is a contained search so it will look for anything similar to what is entered. You can type a particular file number, part of a lender name or a policy number and the system will look for a match.*



WFG File Management [Create New File](#)

**Agency Details**

Agency: Please choose... ▼ Underwriter: State:

**Search Existing Files**

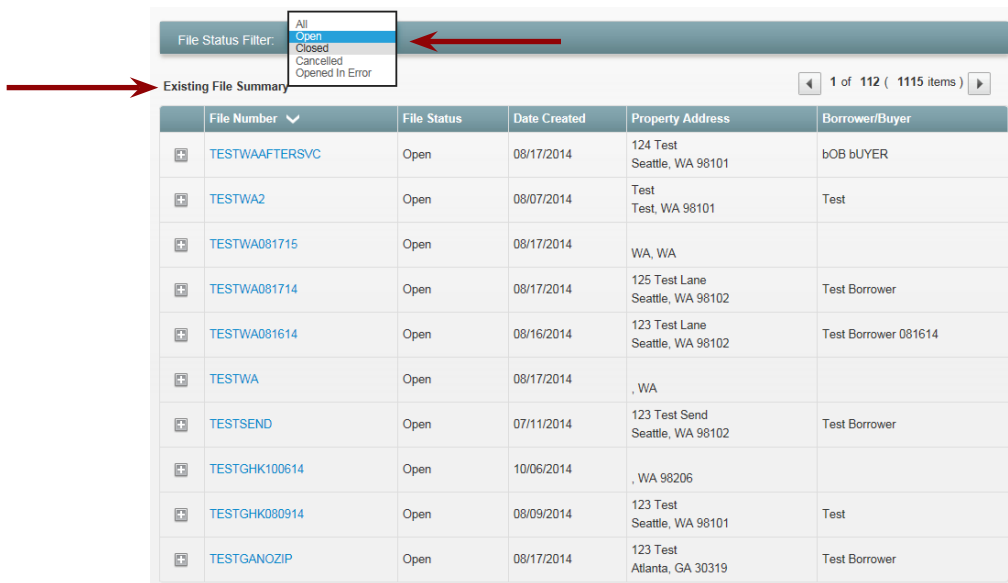
Please choose... ▼  File Number From  To

File Status Filter: Open ▼

The files listed in the grid are referred to as the **Existing File Summary**.

The file summary will default to showing the open files, but the **File Status Filter** will allow you to modify this depending on what you are looking for. The choices are: **All, Open, Closed, Cancelled, and Opened in Error**.

Each column is sortable by hovering over the column heading and clicking the arrow.



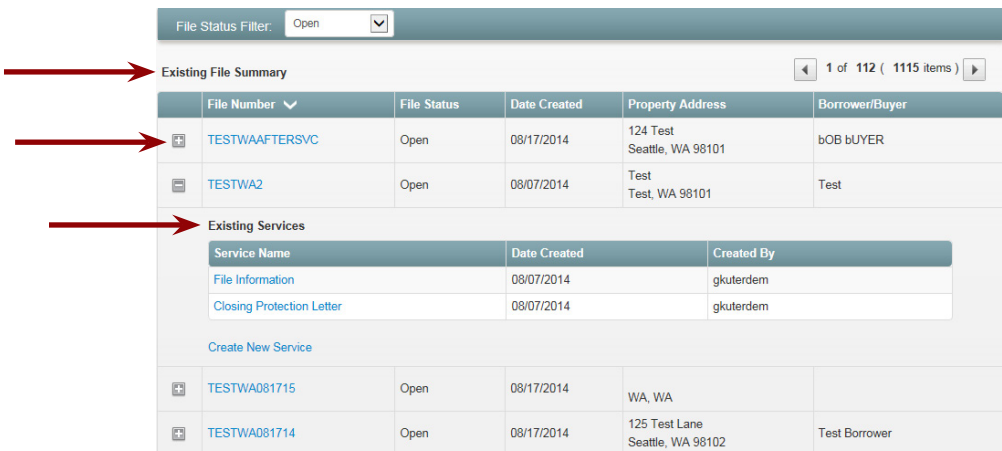
The screenshot shows the 'Existing File Summary' interface. A dropdown menu for 'File Status Filter' is open, showing options: All, Open (selected), Closed, Cancelled, and Opened in Error. A red arrow points to the 'Open' option. Another red arrow points to the 'Existing File Summary' label. The table below lists 10 files.

File Number	File Status	Date Created	Property Address	Borrower/Buyer
TESTWAAFTERSVC	Open	08/17/2014	124 Test Seattle, WA 98101	bOB bUYER
TESTWA2	Open	08/07/2014	Test Test, WA 98101	Test
TESTWA081715	Open	08/17/2014	WA, WA	
TESTWA081714	Open	08/17/2014	125 Test Lane Seattle, WA 98102	Test Borrower
TESTWA081614	Open	08/16/2014	123 Test Lane Seattle, WA 98102	Test Borrower 081614
TESTWA	Open	08/17/2014	, WA	
TESTSEND	Open	07/11/2014	123 Test Send Seattle, WA 98102	Test Borrower
TESTGHK100614	Open	10/06/2014	, WA 98206	
TESTGHK080914	Open	08/09/2014	123 Test Seattle, WA 98101	Test
TESTGANOZIP	Open	08/17/2014	123 Test Atlanta, GA 30319	Test Borrower

## 4. Existing Files

From the **Existing File Summary** screen, you can view existing files or services. Once the **Open Files** are listed, click the **plus sign** to see the list of **Existing Services**.

The File Information hyperlink means a file has been created and the address information has been populated for this file.



The screenshot shows the 'Existing File Summary' interface. The 'File Status Filter' is set to 'Open'. A red arrow points to the 'Existing File Summary' label. Another red arrow points to the plus sign next to the 'TESTWA2' file. A third red arrow points to the 'Existing Services' section, which is expanded to show a list of services for 'TESTWA2'.

File Number	File Status	Date Created	Property Address	Borrower/Buyer
TESTWAAFTERSVC	Open	08/17/2014	124 Test Seattle, WA 98101	bOB bUYER
TESTWA2	Open	08/07/2014	Test Test, WA 98101	Test

Service Name	Date Created	Created By
File Information	08/07/2014	gkuterdem
Closing Protection Letter	08/07/2014	gkuterdem

Create New Service

File Number	File Status	Date Created	Property Address	Borrower/Buyer
TESTWA081715	Open	08/17/2014	WA, WA	
TESTWA081714	Open	08/17/2014	125 Test Lane Seattle, WA 98102	Test Borrower

## 5. Individually Cancel CPL

From the **Existing File Summary** screen, you can view existing files or services. Once the **Open Files** are listed, click the **plus sign** to see the list of **Existing Services**.

In the **Existing File Summary**, click the **Closing Protection Letter** hyperlink.

File Status Filter: Open

Existing File Summary 1 of 112 ( 1115 items )

File Number	File Status	Date Created	Property Address	Borrower/Buyer
TESTWAAFTERSVC	Open	08/17/2014	124 Test Seattle, WA 98101	BOB bUYER
TESTWA2	Open	08/07/2014	Test Test, WA 98101	Test

Existing Services

Service Name	Date Created	Created By
<a href="#">File Information</a>	08/07/2014	gkuterdem
<a href="#">Closing Protection Letter</a>	08/07/2014	gkuterdem

Create New Service

File Number	File Status	Date Created	Property Address	Borrower/Buyer
TESTWA081715	Open	08/17/2014	WA, WA	
TESTWA081714	Open	08/17/2014	125 Test Lane Seattle, WA 98102	Test Borrower

On the **CPL Tab**, you will see a row that is titled Actions. Here you are able to click the hyperlink, **Cancel**.

File Info CPL Jackets OTL

Letters Cancel All

Letter Type	Letter Status	Lender Name	Letter Number	Actions
Transaction	Assigned	Bank of America	BE4FDB04	<a href="#">Cancel</a>   <a href="#">Edit</a>   <a href="#">Send</a>   <a href="#">View</a>
Transaction	Cancelled	123 Lending	D7E4FAB7	<a href="#">Cancel</a>   <a href="#">Edit</a>   <a href="#">Send</a>   <a href="#">View</a>
Transaction	Processing	Crescent Mortgage Company	FED5E786	<a href="#">Cancel</a>   <a href="#">Edit</a>   <a href="#">Send</a>   <a href="#">View</a>

Generate New Letter

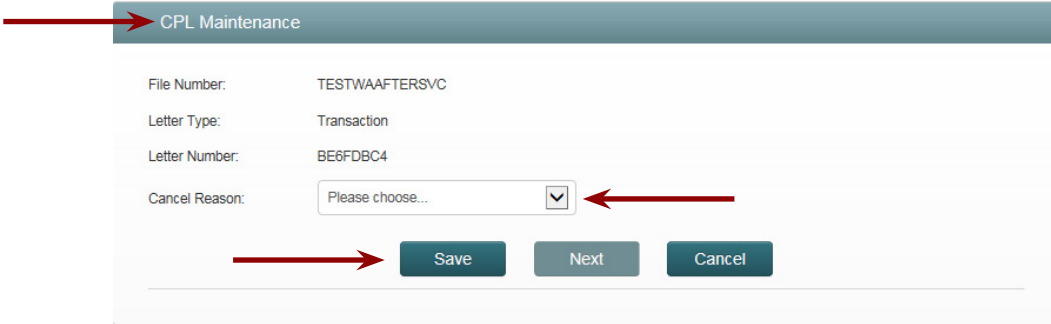
A message will display asking if you are sure you want to cancel the selected letter associated with the file. Click **Yes**.

**Confirmation**

Are you sure you want to cancel the selected letter associated with this file?

[Yes](#) [No](#)

Once you click Yes, you will be directed to the **CPL Maintenance** page. This is where you must select a **Cancel Reason** from the drop down. You will not be able to save or move on to the next file until you select your reason.




CPL Maintenance

File Number: TESTWAAFTERSVC

Letter Type: Transaction

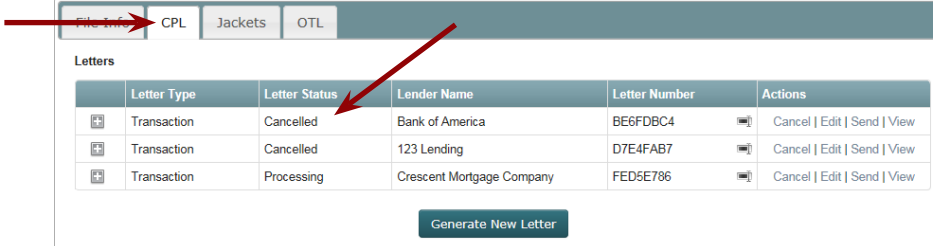
Letter Number: BE6FDBC4

Cancel Reason: Please choose... 

Save Next Cancel







Once you have saved your reason for cancelling the file, you will be taken back to the **WFG Services page/CPL Tab**.

The **Letter Status** is now cancelled.



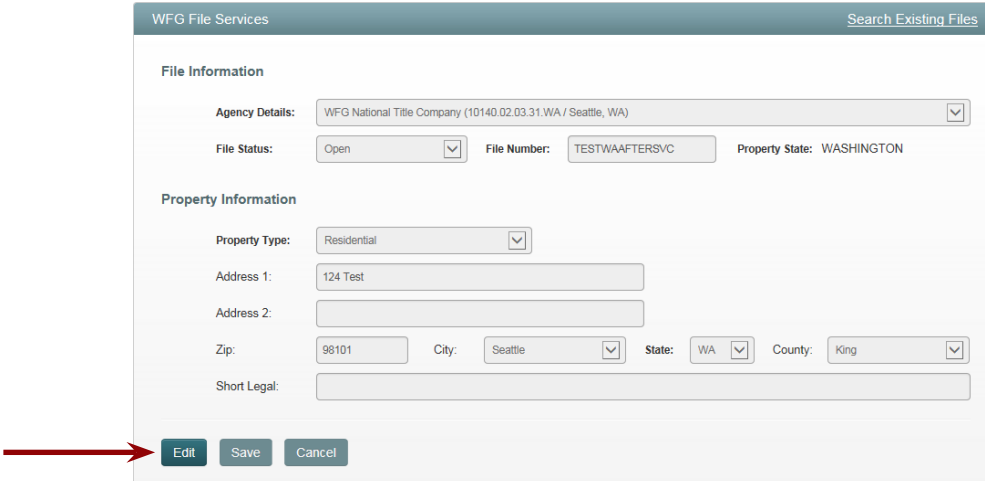
File Status: CPL Jackets OTL

Letters

	Letter Type	Letter Status	Lender Name	Letter Number	Actions
	Transaction	Cancelled	Bank of America	BE6FDBC4	 Cancel   Edit   Send   View
	Transaction	Cancelled	123 Lending	D7E4FAB7	 Cancel   Edit   Send   View
	Transaction	Processing	Crescent Mortgage Company	FED5E786	 Cancel   Edit   Send   View


Generate New Letter


To officially cancel the status of this file, Click **Edit** to enable to **File Status** drop down menu.




WFG File Services Search Existing Files

File Information

Agency Details: WFG National Title Company (10140.02.03.31.WA / Seattle, WA) 




File Status: Open  File Number: TESTWAAFTERSVC Property State: WASHINGTON

Property Information

Property Type: Residential 

Address 1: 124 Test

Address 2:

Zip: 98101 City: Seattle  State: WA  County: King 

Short Legal:

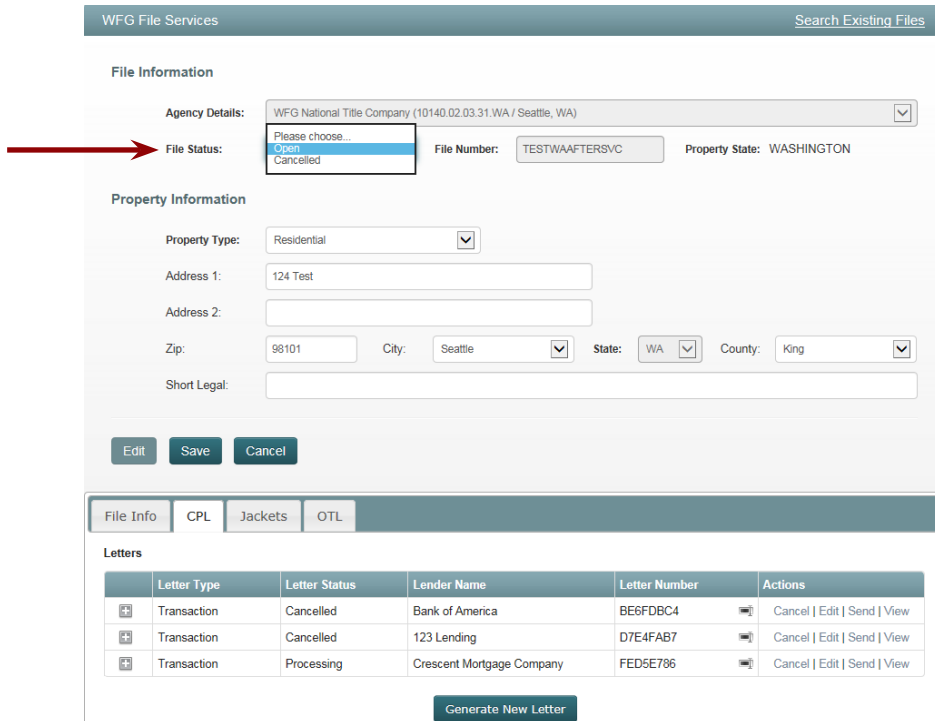
Edit Save Cancel

Then click the **File Status** drop down menu and select **Cancel**.

*Note: that you will change the status to Cancelled if there are services associated to the file.*

*If there are no services created and a title file cancelled, you will need to update the file status to **Opened In Error**.*

Click **Save**.



WFG File Services [Search Existing Files](#)

File Information

Agency Details: WFG National Title Company (10140.02.03.31.WA / Seattle, WA)

File Status: **Open** (Please choose... Open Cancelled) File Number: TESTWAAFTERSVC Property State: WASHINGTON

Property Information

Property Type: Residential

Address 1: 124 Test

Address 2:

Zip: 98101 City: Seattle State: WA County: King

Short Legal:

Edit Save Cancel

File Info CPL Jackets OTL

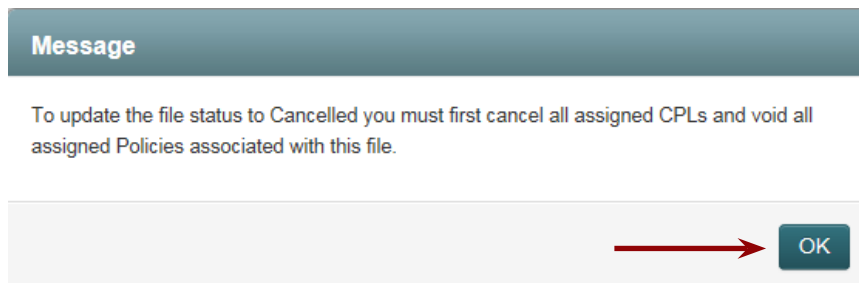
Letters

	Letter Type	Letter Status	Lender Name	Letter Number	Actions
+	Transaction	Cancelled	Bank of America	BE6FDBC4	Cancel   Edit   Send   View
+	Transaction	Cancelled	123 Lending	D7E4FAB7	Cancel   Edit   Send   View
+	Transaction	Processing	Crescent Mortgage Company	FED5E786	Cancel   Edit   Send   View

Generate New Letter

You will be prompted by a message letting you know that the File Record has been successfully updated.

Click **Ok**.



**Message**

To update the file status to Cancelled you must first cancel all assigned CPLs and void all assigned Policies associated with this file.

OK

## 6. Individually Cancel Jacket

From the **Existing File Summary** screen, you can view existing files or services. Once the **Open Files** are listed, click the **plus sign** to see the list of **Existing Services**.

In the **Existing File Summary**, click the **Jackets** hyperlink.

Existing File Summary 1 of 112 ( 1115 items )

File Number	File Status	Date Created	Property Address	Borrower/Buyer
TESTWAAFTERSVC	Open	08/17/2014	124 Test Seattle, WA 98101	BOB bUYER

Existing Services

Service Name	Date Created	Created By
File Information	08/17/2014	gkuterdem
Closing Protection Letter	11/03/2014	CplWebTestAcct
Policy Jacket	11/03/2014	CplWebTestAcct

Create New Service

File Number	File Status	Date Created	Property Address	Borrower/Buyer
TESTWA2	Open	08/07/2014	Test Seattle, WA 98101	Buyer Bob
TESTWA081715	Open	08/17/2014	WA, WA	
TESTWA081714	Open	08/17/2014	125 Test Lane Seattle, WA 98102	Test Borrower
TESTWA081614	Open	08/16/2014	123 Test Lane Seattle, WA 98102	Test Borrower 081614

On the **Jackets Tab**, you will see a row that is titled **Actions**. Here you are able to click the hyperlink, **Void**.

File Info Jackets OTL Void All

Jackets

Jacket Type	Policy Status	Policy Number	Policy Date	Actions
Owners Policy Cover	Assigned	3155400-01496461	11/03/2014	Edit   Send   View   Void
ALTA Homeowner's Policy	Assigned	3159900-01496460	11/20/2014	Edit   Send   View   Void

Generate New Jacket

You will be prompted by a confirmation message asking you if you are sure you would like to void the selected policy jacket associated with the file.

Click **Yes**.

**Confirmation**

Are you sure you want to void the selected policy jacket associated with this file?

Yes No



Once you click **Yes**, you will be directed to the **Policy Jacket Maintenance** page. This is where you must select a **Cancel Reason** from the drop down. You will not be able to save or move on to the next file until you select your reason.

Policy Jacket Maintenance

File Number: TESTWAAFTERSVC

Jacket Type: Owners Policy Cover

Policy Number: 3155400-01496461

Void Reason: Please choose...

Save Next Cancel





Once you have saved your reason for cancelling the file, you will be taken back to the **WFG File Services** page.

The Policy Status is now **Voided**.

File InfoCPLJacketsOTL

Jackets

Void All

	Jacket Type	Policy Status	Policy Number	Policy Date	Actions
	ALTA Homeowner's Policy	Assigned	3159900-01496460 	11/20/2014	<a href="#">Edit</a>   <a href="#">Send</a>   <a href="#">View</a>   <a href="#">Void</a>
	Owners Policy Cover	Voided	3155400-01496461 	11/03/2014	<a href="#">Edit</a>   <a href="#">Send</a>   <a href="#">View</a>   <a href="#">Void</a>

Generate New Jacket

To officially cancel the status of this file, Click Edit to enable to File Status drop down menu.

WFG File Services Search Existing Files

**File Information**

Agency Details: WFG National Title Company (10140.02.03.31.WA / Seattle, WA)

File Status: Open File Number: TESTWAAFTERSVC Property State: WASHINGTON

**Property Information**

Property Type: Residential

Address 1: 124 Test

Address 2:

Zip: 98101 City: Seattle State: WA County: King

Short Legal:

Edit Save Cancel

Then click the **File Status** drop down menu and select **Cancel**.

*Note: that you will change the status to Cancelled if there are services associated to the file.*

*If there are no services created and a title file cancelled, you will need to update the file status to **Opened In Error**.*

Click **Save**.

WFG File Services
[Search Existing Files](#)

**File Information**

**Agency Details:** WFG National Title Company (10140.02.03.31.WA / Seattle, WA) ▼

**File Status:** Please choose...  
Open  
Cancelled

**File Number:** TESTWAAFTERSVC

**Property State:** WASHINGTON

**Property Information**

**Property Type:** Residential ▼

**Address 1:** 124 Test

**Address 2:**

**Zip:** 98101 **City:** Seattle ▼ **State:** WA ▼ **County:** King ▼

**Short Legal:**

Edit
Save
Cancel

File Info
CPL
Jackets
OTL

**Letters**

	Letter Type	Letter Status	Lender Name	Letter Number	Actions
	Transaction	Cancelled	Bank of America	BE6FDBC4	Cancel   Edit   Send   View
	Transaction	Cancelled	123 Lending	D7E4FAB7	Cancel   Edit   Send   View
	Transaction	Processing	Crescent Mortgage Company	FED5E786	Cancel   Edit   Send   View

Generate New Letter

You will be prompted by a message letting you know that the File Record has been successfully updated.

Click **OK**.

*Note: that once you make this change you will not be able to bring this file back.*

**Message**

To update the file status to Cancelled you must first cancel all assigned CPLs and void all assigned Policies associated with this file.

OK

## 7. Cancel All Services in a File

If you would like to cancel all of the letters associated with a certain file, click **Cancel All** on the **CPL Tab** and **Void All** on the **Jackets Tab**.

The screenshot shows two tabs: 'Letters' and 'Jackets'. In the 'Letters' tab, there is a table with columns: Letter Type, Letter Status, Lender Name, Letter Number, and Actions. The 'Actions' column contains links: 'Cancel | Edit | Send | View'. A red arrow points to the 'Cancel All' link in the top right corner of the 'Letters' tab. In the 'Jackets' tab, there is a table with columns: Jacket Type, Policy Status, Policy Number, Policy Date, and Actions. The 'Actions' column contains links: 'Edit | Send | View | Void'. A red arrow points to the 'Void All' link in the top right corner of the 'Jackets' tab.

Letter Type	Letter Status	Lender Name	Letter Number	Actions
Transaction	Assigned	American Southwest Mortgage Corp ISAOA	BB360AC9	Cancel   Edit   Send   View
Transaction	Cancelled	Evergreen Moneysource Mortgage Company, ISAOA/ATIMA	8160D3D4	Cancel   Edit   Send   View
Transaction	Cancelled	American Southwest Mortgage Corp ISAOA	01B19B65	Cancel   Edit   Send   View

Generate New Letter

Jacket Type	Policy Status	Policy Number	Policy Date	Actions
ALTA Homeowner's Policy	Assigned	3159900-01496460	11/20/2014	Edit   Send   View   Void
Owners Policy Cover	Voided	3155400-01496461	11/03/2014	Edit   Send   View   Void

Generate New Jacket

You will receive a pop-up message asking if you are sure you would like to cancel all letters associated with this file. Click **Yes**.

**Confirmation**

Are you sure you want to cancel all letters associated with this file?

Yes No

Once you click **Yes**, you will be directed to the CPL Maintenance page. This is where you must select the Cancel Reason for all of the letters associated with the file. You will not be able to save or move on to the next file until you select your reason.

*Note: That the **Save** button will not enable until you have clicked next and selected a reason for each letter.*

**CPL Maintenance**

File Number: TESTSEND

Letter Type: Transaction

Letter Number: BB360AC9

Cancel Reason: Please choose...

Save Next Cancel

Once you have saved your reasons for cancelling the file, you will be redirected back to the **WFG File Services** page.

The **Letter Status** for all of the files should now be cancelled.

File InfoCPLJacketsOTL

Letters

	Letter Type	Letter Status	Lender Name	Letter Number	Actions
	Transaction	Cancelled	American Southwest Mortgage Corp ISAOA	BB360AC9	Cancel   Edit   Send   View
	Transaction	Cancelled	Evergreen Moneysource Mortgage Company, ISAOA/ATIMA	8160D3D4	Cancel   Edit   Send   View
	Transaction	Cancelled	American Southwest Mortgage Corp ISAOA	01B19B65	Cancel   Edit   Send   View

Generate New Letter

The next step to cancel the status of this file is to click **Edit** to enable the **File Status drop down** menu.

Then click the File Status drop down menu and select **Cancel**.

WFG File Services
[Search Existing Files](#)

File Information

Agency Details:
WFG National Title Company (10140.02.03.31.WA / Seattle, WA)

File Status:
Cancelled

File Number:
TESTSEND

Property State:
WASHINGTON

Property Information

Property Type:
Residential

Address 1:
123 Test Send

Address 2:

Zip:
98102
City:
Seattle
State:
WA
County:
Please choose...

Short Legal:

Edit

Save

Cancel

File Info
CPL
Jackets
OTL


**Letters**

	Letter Type	Letter Status	Lender Name	Letter Number	Actions
	Transaction	Cancelled	American Southwest Mortgage Corp ISAOA	BB360AC9	Cancel   Edit   Send   View
	Transaction	Cancelled	Evergreen Moneysource Mortgage Company, ISAOA/ATIMA	8160D3D4	Cancel   Edit   Send   View
	Transaction	Cancelled	American Southwest Mortgage Corp ISAOA	01B19B65	Cancel   Edit   Send   View

You will be prompted by a confirmation message asking you if you are sure you would like to change the file status to Cancelled. Click **Yes**.

**Confirmation**

Are you sure you want to change the file status to Cancelled on this file?




You will be prompted by a message letting you know that the File Record has been successfully updated. Click **OK**

*Note: that once you make this change you will not be able to bring this file back.*

**Message**

File Record has been successfully updated.



If you would like to cancel all of the **Jackets** associated with a certain file, click **Void All** on the **WFG File Services** screen and following the same steps as the CPL.

WFG File Services
[Search Existing Files](#)

**File Information**

Agency Details: WFG National Title Company (10140.02.03.31.WA / Seattle, WA)

File Status: Open

File Number: TESTWAAFTERSVC

Property State: WASHINGTON

**Property Information**

Property Type: Residential

Address 1: 124 Test

Address 2:

Zip: 98101

City: Seattle

State: WA


County: King

Short Legal:

File Info
CPL
Jackets
OTL

**Jackets**

	Jacket Type	Policy Status	Policy Number	Policy Date	Actions
<input type="checkbox"/>	ALTA Homeowner's Policy	Assigned	3159900-01496460	11/20/2014	<a href="#">Edit</a>   <a href="#">Send</a>   <a href="#">View</a>   <a href="#">Void</a>
<input type="checkbox"/>	Owners Policy Cover	Voided	3155400-01496461	11/03/2014	<a href="#">Edit</a>   <a href="#">Send</a>   <a href="#">View</a>   <a href="#">Void</a>


[Void All](#)