



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 or **1-877-840-0841** for help.

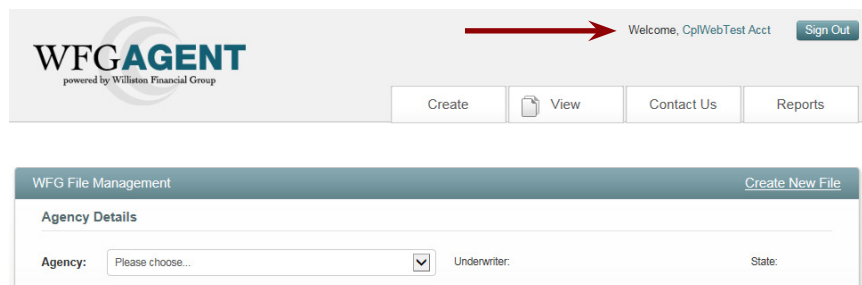
Stand - Alone

The purpose of this document is to provide step-by-step instructions to create a CPL or Jacket without using an existing file. Once the CPL or Jacket is generated, a file will be created.

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.

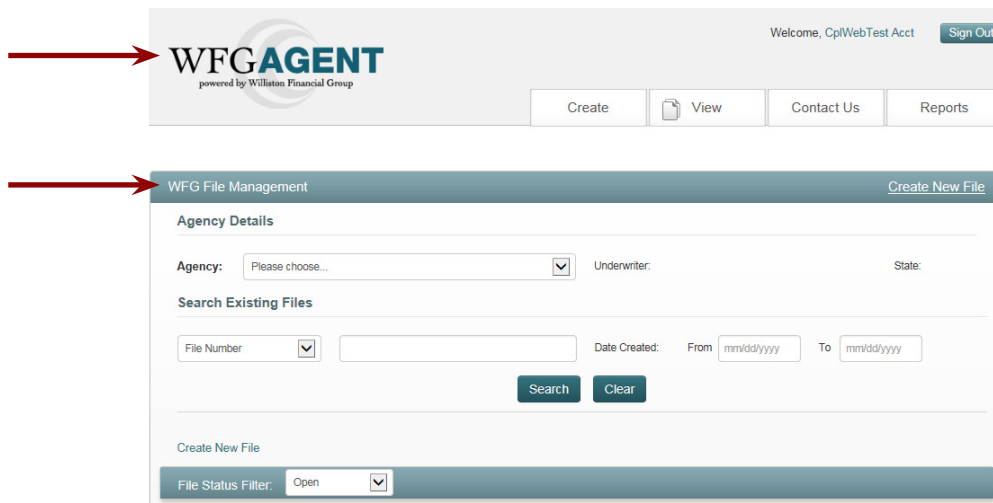


The screenshot shows the WFGAGENT login page. At the top left is the WFGAGENT logo with the tagline "powered by Williston Financial Group". To the right of the logo is a red arrow pointing to the text "Welcome, CplWebTest Acct" and a "Sign Out" button. Below the logo is a navigation bar with buttons 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 form with fields for "Agency" (a dropdown menu with "Please choose..." selected), "Underwriter", and "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 tagline "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 form with fields for "Agency" (a dropdown menu with "Please choose..." selected), "Underwriter", and "State". Below this is a section titled "Search Existing Files" with a form for "File Number" (a dropdown menu with "Please choose..." selected), "Date Created" (with "From" and "To" date pickers), and "Search" and "Clear" buttons. At the bottom, there is a "Create New File" section with a "File Status Filter" dropdown menu set to "Open".

3. Create CPL

Once you are viewing the **WFG File Management window**, your agency will automatically default in the **Agency window**.

Once you see your agency, hover over the **Create Tab** and click **CPL**.

The screenshot shows the WFGAGENT File Management interface. At the top, there's a header with the WFGAGENT logo and a 'Sign Out' button. Below the header is a navigation bar with buttons for 'Create', 'View', 'Contact Us', and 'Reports'. A dropdown menu is open under 'Create', showing options for 'CPL', 'Create OTL Request', and 'Jacket'. Below this is the 'WFG File Management' section, which includes 'Agency Details' with an 'Agency' dropdown menu, 'Search Existing Files' with a search bar and date filters, and a 'Create New File' section with a 'File Status Filter' dropdown menu.

Once you click on **CPL**, the **Generate Closing Protection Letter** will display.

All of the bolded fields are required: **File Number**, **Address**, **Borrower/Buyer Name**, and **Lender**.


Once the required fields are entered, click **Generate Letter**.

The screenshot shows the 'Generate Closing Protection Letter' form. It includes sections for 'Agency Details' (with a checkbox to 'Include Agency in Cc'), 'Letter Type' (set to 'Transaction'), 'File Number' and 'Liability Amount' (both bolded and required), 'Property State' (set to 'WASHINGTON'), 'Address 1' (bolded and required), 'Address 2', 'Zip', 'City', and 'State' (set to 'WA'). There's also an 'Additional Letter Information' section with 'Loan Number', 'Borrower/Buyer Name(s)' (bolded and required), and a checkbox for 'View Frequently Used Lenders Only'. The 'Lender' dropdown menu is also bolded and required. At the bottom, there are 'Delivery Options' for 'Email Letter To' and 'Fax Letter To'. A red arrow points to the 'Generate Letter' button at the bottom left, and another red arrow points to the 'Generate Closing Protection Letter' title at the top left.

Once you click **Generate Letter**, you will be prompted by a confirmation message. Click **Ok**.

Message

Thank you for generating a Closing Protection Letter. The PDF will be processed and available shortly.

The letter number is 29D0A009. 

OK

You will be taken to the **WFG Services** page where you will see that the system automatically created a file for this service.

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:

123564

Property State:

WASHINGTON

Property Information

Property Type:

Residential

Address 1:

1234 Test Street

Address 2:

Zip:

98028

City:

Kenmore

State:

WA

County:

King

Short Legal:

Edit

Save

Cancel



File Info

CPL

Jackets

OTL

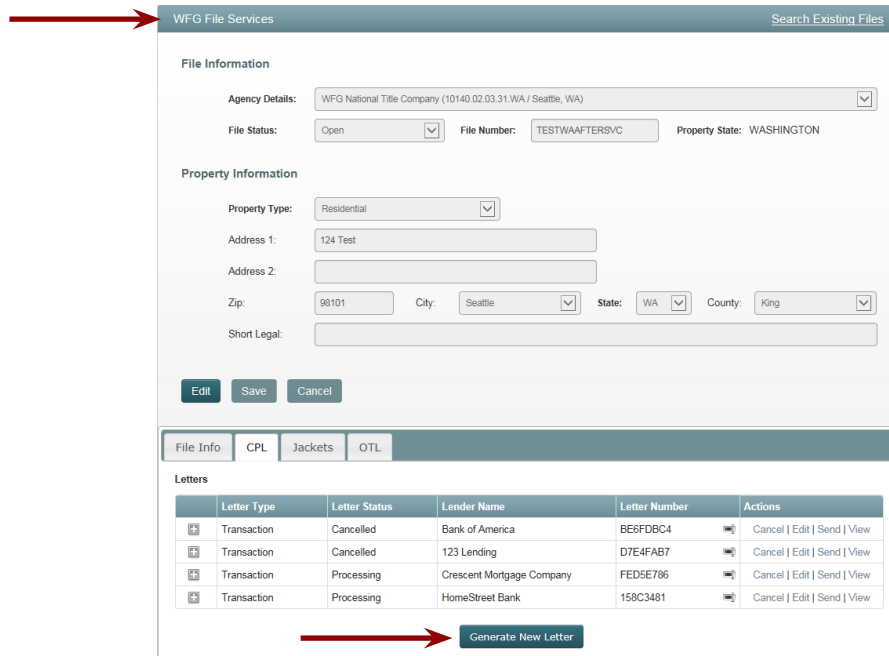
Letters

	Letter Type	Letter Status	Lender Name	Letter Number	Actions
	Transaction	Processing	HomeStreet Bank	29D0A009 	Cancel Edit Send View

Generate New Letter

4. Second CPL

In the event that you would like to do a second letter, click on CPL tab and then click **Generate New Letter** at the bottom of the **WFG Services** page.



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

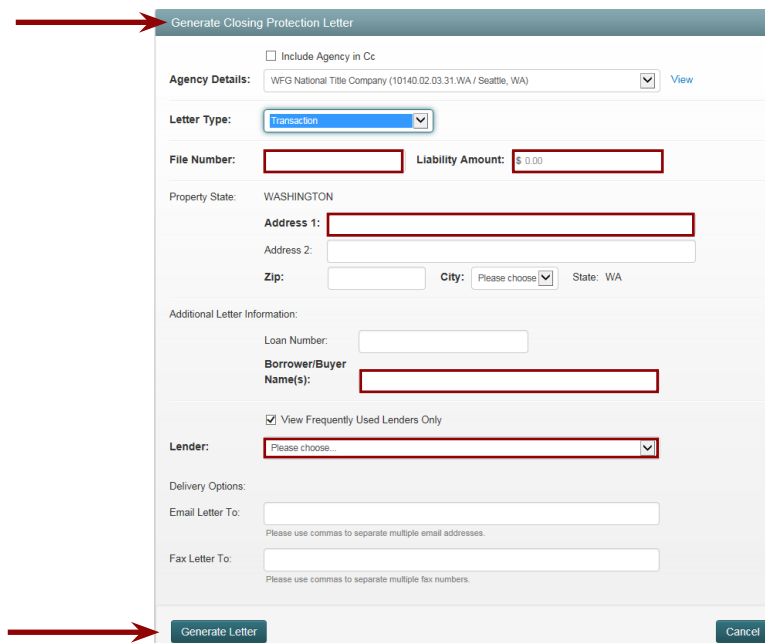
Letters

Letter Type	Letter Status	Lender Name	Letter Number	Actions
Transaction	Cancelled	Bank of America	BE6FDEC4	Cancel Edit Send View
Transaction	Cancelled	123 Lending	D7E4FAB7	Cancel Edit Send View
Transaction	Processing	Crescent Mortgage Company	FED5E786	Cancel Edit Send View
Transaction	Processing	HomeStreet Bank	158C3481	Cancel Edit Send View

Generate New Letter

All of the bolded fields are required: **File Number**, **Address**, **Borrower/Buyer Name**, and **Lender**.

Once the required fields are entered, click **Generate Letter**.



Generate Closing Protection Letter

☐ Include Agency in Cc

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

Letter Type: Transaction ▼

File Number: Liability Amount: \$ 0.00

Property State: WASHINGTON

Address 1:

Address 2:

Zip: City: Please choose ▼ State: WA

Additional Letter Information:

Loan Number:

Borrower/Buyer Name(s):

☒ View Frequently Used Lenders Only

Lender: Please choose... ▼

Delivery Options:

Email Letter To:
Please use commas to separate multiple email addresses.


Fax Letter To:
Please use commas to separate multiple fax numbers.

Generate Letter Cancel

Once you click **Generate Letter**, you will be prompted by a confirmation message. Click **Ok**.

Message

Thank you for generating a Closing Protection Letter. The PDF will be processed and available shortly.

The letter number is 29D0A009. 

OK

You will be taken to the **WFG Services** page where you will see that the system automatically created a file for this service.

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:

123564

Property Information

Property Type:

Residential

Address 1:

1234 Test Street

Address 2:

Zip:

98028

City:

Kenmore

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	Processing	HomeStreet Bank	29D0A009 	Cancel Edit Send View

Generate New Letter

5. Create Jacket

Once you are viewing the **WFG File Management** window, your agency will automatically default in the **Agency window**.

Once you see your agency, hover over the **Create Tab** and click **Jacket**.

The screenshot shows the WFGAGENT interface. At the top, there's a header with the logo and a 'Welcome, CplWebTest Acct' message with a 'Sign Out' link. Below the header is a navigation bar with buttons: 'Create', 'View', 'Contact Us', and 'Reports'. A dropdown menu is open under 'Create', showing options: 'CPL', 'Create OTL Request', and 'Jacket'. A red arrow points to the 'Jacket' option. Below the navigation bar is the 'WFG File Management' section, which is highlighted by a red arrow. It contains 'Agency Details' (Agency, Underwriter, State), 'Search Existing Files' (File Number, Date Created, Search, Clear), and a 'Create New File' button. At the bottom, there's a 'File Status Filter' set to 'Open'.

Once you click on Jacket, the **Generate Policy Jacket** screen will display.

All of the bolded fields are required: **Property Type**, **File Number**, **Liability amount**, **Jacket Type**, **Policy Date**, **Property State** and **State**.


Once the required fields are entered, click **Generate Jacket**.

The screenshot shows the 'Generate Policy Jacket' form. It has two tabs: 'Policy Jacket' (selected) and 'Endorsements'. The form contains several fields: 'Agency Details' (Agency, Underwriter, State), 'File Number', 'Property Type', 'Jacket Type', 'Liability Amount', 'Policy Premium', 'Policy Date', 'Policy Time', 'Loan Number', 'Mortgage Date', 'Mortgage Amount', 'Property State', 'Address 1', 'Zip', 'City', 'State', 'County', 'Borrower/Buyer Name(s)', 'Insured Names', 'Insured Clause', 'Delivery Options', 'Email Jacket to', and 'Fax Jacket to'. Red boxes highlight the required fields: 'Property Type', 'File Number', 'Liability Amount', 'Jacket Type', 'Policy Date', 'Property State', and 'State'. A red arrow points to the 'Generate Jacket' button at the bottom left, and another red arrow points to the 'Policy Jacket' tab at the top left.

Once you click **Generate Letter**, you will be prompted by a confirmation message. Click **OK**.

Message

Thank you for generating an eJacket. The PDF will be processed and available shortly.

The policy number is 3159900-01496463. 

OK

You will be taken to the **WFG Services** page where you will see that the system automatically created a file for this service.

6. Second Jacket

In the event that you would like to do a second jacket, click on **Jackets Tab** and then click **Generate New Jacket** at the bottom of the **WFG Services** page.

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:

TESTWA081715

Property State:

WASHINGTON

Property Information

Property Type:

Residential

Address 1:

Address 2:

Zip:

City:

WA

State:

WA

County:

Short Legal:

Edit

Save



Cancel

File Info

CPL

Jackets

Jackets

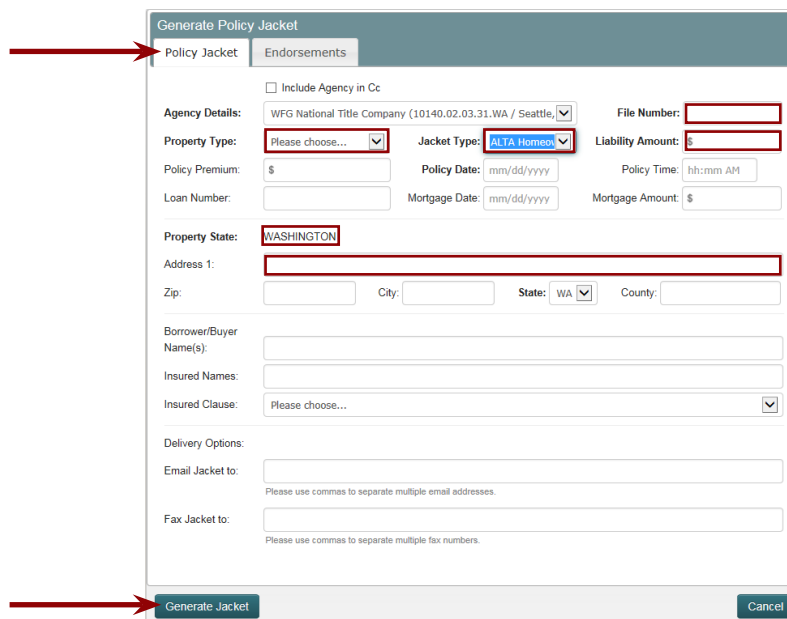
	Jacket Type	Policy Status	Policy Number	Policy Date	Actions
	Short Form Residential Loan Policy	Voided	3153400-01430717 	08/02/2014	Edit Send View Void

Generate New Jacket

Once you click on Jacket, the **Generate Policy Jacket** screen will display.

All of the bolded fields are required: **Property Type**, **File Number**, **Liability amount**, **Jacket Type**, **Policy Date**, **Property State** and **State**.

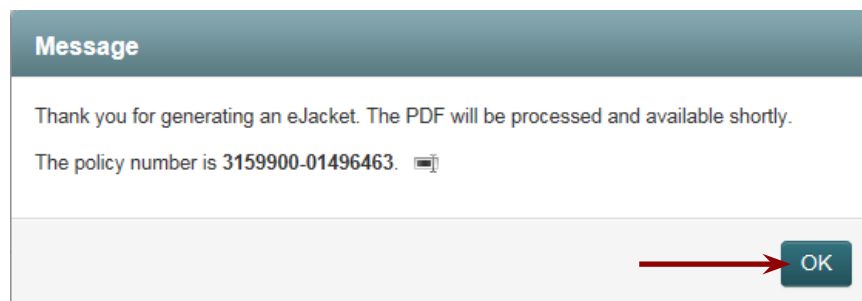
Once the required fields are entered, click **Generate Jacket**.



The screenshot shows the 'Generate Policy Jacket' form. A red arrow points to the 'Policy Jacket' tab. Another red arrow points to the 'Generate Jacket' button at the bottom. The form contains the following fields:

- ☐ Include Agency in Cc
- Agency Details: WFG National Title Company (10140.02.03.31.WA / Seattle, WA)
- File Number: [Redacted]
- Property Type: Please choose... (dropdown)
- Jacket Type: ALTA Homeowner (dropdown)
- Liability Amount: \$ [Redacted]
- Policy Premium: \$ [Redacted]
- Policy Date: mm/dd/yyyy
- Policy Time: hh:mm AM
- Loan Number: [Redacted]
- Mortgage Date: mm/dd/yyyy
- Mortgage Amount: \$ [Redacted]
- Property State: WASHINGTON
- Address 1: [Redacted]
- Zip: [Redacted] City: [Redacted] State: WA (dropdown) County: [Redacted]
- Borrower/Buyer Name(s): [Redacted]
- Insured Names: [Redacted]
- Insured Clause: Please choose... (dropdown)
- Delivery Options:
- Email Jacket to: [Redacted]
- Fax Jacket to: [Redacted]

Once you click **Generate Letter**, you will be prompted by a confirmation message. Click **OK**.



The screenshot shows a confirmation message box with the following text:

Message

Thank you for generating an eJacket. The PDF will be processed and available shortly.

The policy number is 3159900-01496463. 📄

At the bottom right, there is an 'OK' button, which is pointed to by a red arrow.

You will be taken to the **WFG Services** page where you will see that the system automatically created a file for this service.

7. Multiple Services

If you just created a file and you are still on the **WFG File Services** page, you can click **Search Existing Files**.

→ **WFG File Services** → [Search Existing Files](#)

File Information

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

File Status: Open [v] File Number: TESTWA081715 Property State: WASHINGTON

Property Information

Property Type: Residential [v]

Address 1: [text box]

Address 2: [text box]

Zip: [text box] City: WA State: WA [v] County: [text box]

Short Legal: [text box]

[Edit] [Save] [Cancel]

File Info | **CPL** | Jackets | OTL

Jackets

Jacket Type	Policy Status	Policy Number	Policy Date	Actions
Short Form Residential Loan Policy	Voided	3153400-01430717	08/02/2014	[Edit] [Send] [View] [Void]

[Generate New Jacket]

This will take you to the **WFG File Management** page. Click **Search** to refresh the **Existing File Summary**. This will pull in the file that was just created.

Note: Normally the existing file summary is sorted by File Number, but you change that option by clicking on the heading you wish to sort by.

→ **WFG File Management** [Create New File](#)

Agency Details

Agency: WFG National Title Company (10140.02.03.31.WA / Seattle, WA) [v] Underwriter: WFG National Title Insurance Company State: WA

Search Existing Files

File Number [v] [text box] Date Created: From [mm/dd/yyyy] To [mm/dd/yyyy]

[Search] [Clear]

Create New File

File Status Filter: Open [v]

→ **Existing File Summary** 1 of 112 (1116 items)

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

To view the new file you created, click **Date Created**.

Create New File

File Status Filter: Open

Existing File Summary 1 of 112 (1116 items)

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

Hover over the **Create** tab and click **CPL**.

WFGAGENT powered by Williston Financial Group

Welcome, CplWebTest Acct Sign Out

Create View Contact Us Reports

CPL

Create OTL Request

Jacket

WFG File Management Create New File

Agency Details

Agency: Please choose... Underwriter: State:

Search Existing Files

File Number Date Created: From To

Search Clear

Create New File

File Status Filter: Open

If the file exists, you can type in the **File Number** and **“Tab”** over to populate the address information.

To create a second CPL, type in the bold field and click **Generate Letter**.

The screenshot shows the 'Generate Closing Protection Letter' form. A red arrow points to the 'File Number' field, which contains 'TESTWA2'. Another red arrow points to the 'Generate Letter' button at the bottom left. The form includes sections for Agency Details, Letter Type, Property State, Address, Zip, City, State, Additional Letter Information, Lender, and Delivery Options.

Once you click **Generate Letter**, you will be prompted by a confirmation message. Click **OK**.

The screenshot shows a 'Message' box with the text: 'Thank you for generating a Closing Protection Letter. The PDF will be processed and available shortly. The letter number is 29D0A009.' A red arrow points to the 'OK' button at the bottom right.

You will be taken to the WFG File Services page where you will see that a new file has been created.