

## TitleFusion / The Fund Integration

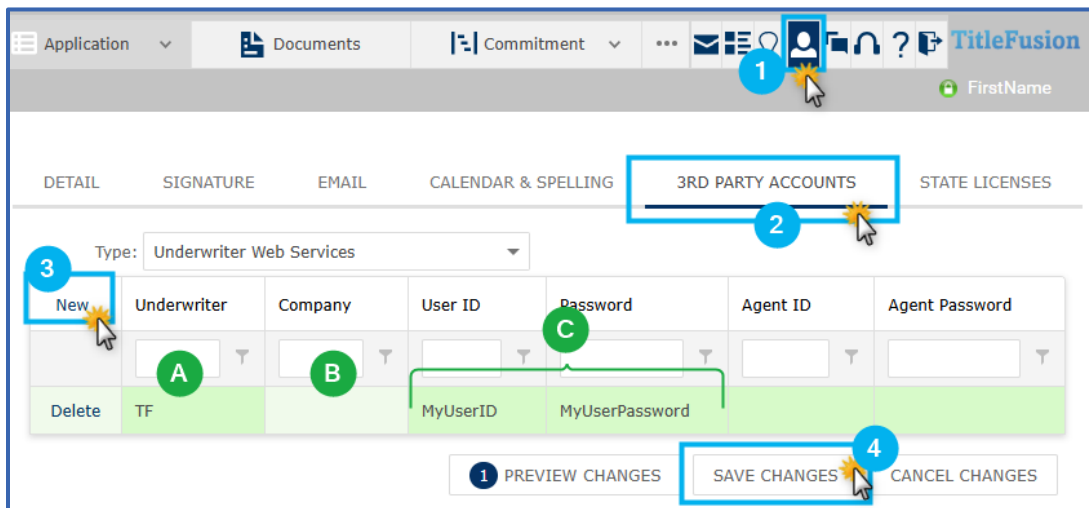
When The Fund's user credentials and file requirements are satisfied, users may request the following services through the integration: Title Searches, CPL requests, and Jacket requests.

### Requirements

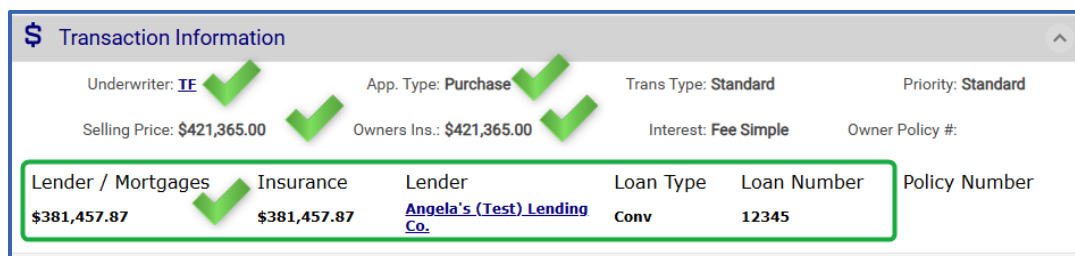
- Each user's credentials for The Fund **MUST** be added to the user's **3<sup>rd</sup> Party Accounts** section of **User Details**.

To add or edit underwriter user credentials:

- Select the **User Details** icon in the TitleFusion utility bar.
- Select the **3<sup>rd</sup> PART ACCOUNTS** tab.
- With **Underwriter Web Services** selected in the **Type** field, select the **New** button.
  - Underwriter:** Select TF (Old Republic National Title / The Fund)
  - Company** (not required): Select a company if the login is utilized for only one company
  - Key-in the **User ID** and (User) **Password**
- Select **SAVE CHANGES** at the bottom of the table



- The following **Application** information is required:
  - Transaction Information:** **App. Type**, **Selling Price/Owners Insurance** (if applicable); The Fund (TF) must be selected as the **Underwriter**; and all **Loan/Lender Insurance** details (if applicable).



Lender / Mortgages	Insurance	Lender	Loan Type	Loan Number	Policy Number
\$381,457.87	\$381,457.87	Angela's (Test) Lending Co.	Conv	12345	

- **Property Information:** **Property Mailing City**, five-digit **Zip Code**, **State**, **County**, **Property Type**, **Residential Type** (if applicable)

**Property Information**

Address: Shalimar FL, 32579 ✓  
 County: Okaloosa ✓  
 Municipality: Shalimar  
 Parcel: Parcel#1  
 Deed Bk: ✓  
 Property Type: Residential - 1 Family ✓  
 Deed Pg: Instr  
 Property Use:  
 Condo:  
 Assessment Total: \$0.00  
 Assessment, Land: \$0.00  
 Plat #: Filing Date: Filed Ma

- **Buyer/Seller Information:** Identify the party as a **Company** (Entity, Estate or Trust) (if applicable), **First** and **Last Name** OR **Company Name** and **Company Rep**, **Collective Names**, 2 lines **Current Mailing Address** (Line 1: Street Number and Street Name; Line 2: City, State and Zip Code)

Buyer Information - TF-15010A

Company	Last Name / Company Name	First / Middle / Company Rep.	Social	D.O.B.	Maiden
1 <input type="checkbox"/>	Buyer	Samantha			
2 <input type="checkbox"/>	Buyer	Sydney			
3					
4					

Name: Samantha Buyer and Sydney Buyer, domestic partners CC

Mailing Address: 100 South Broad Street Philadelphia, Pennsylvania, 19102 CC  
 Future Mailing Address CC

Tel.: (856) 111-2222 Mobile:

Email: buyers@yahoo.com Alt. Tel / Fax:

Multiple email addresses can be added with a semicolon Web Password: CC

## Access the Underwriter Integration

Access the underwriter integration by selecting the hyperlink in the **Transaction Information** section of the Application screen.

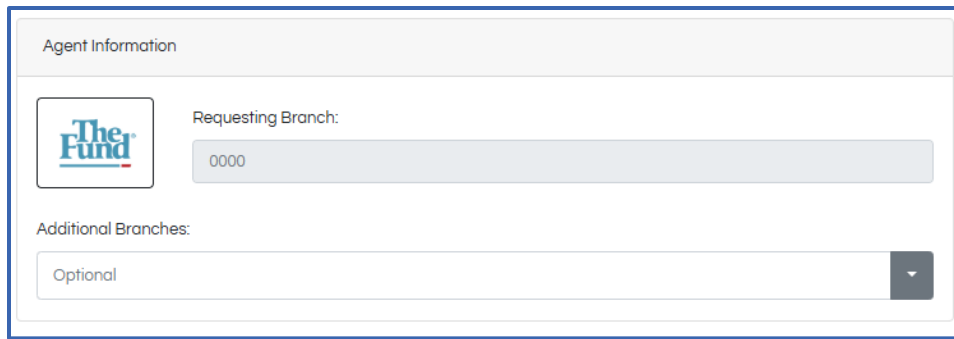
**\$ Transaction Information**

Underwriter: [TF](#) App. Type: Purchase  
 Selling Price: \$421,365.00 Owners Ins.: \$421,365.00


## Agent Information

**Requesting Branch:** Displays the branch associated with user's credentials.

**Additional Branches:** May be selected for requesting products, if applicable.



Agent Information

 Requesting Branch:

0000

Additional Branches:

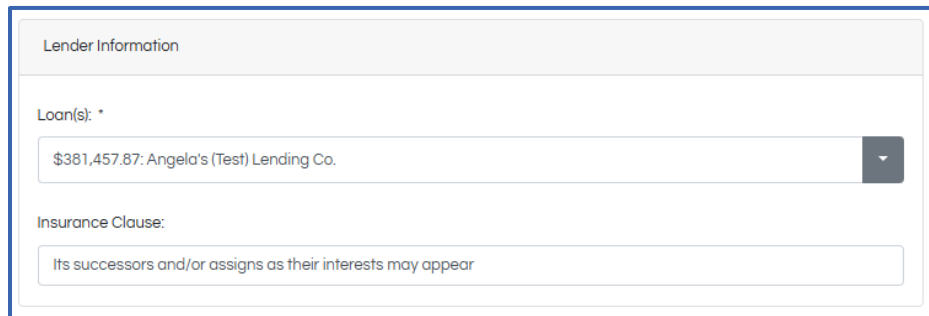
Optional

## Lender Information

**Loan(s):** Select the loan from the drop-down to associate with products being requested (ex. Lender CPL or Mortgagee Policy Jacket).

### Insurance Clause:

- When available, the Ins. Clause from the Lender phonebook entry is defaulted; otherwise “Its successors and/or assigns as their interests may appear” will display.
- Users may edit the language as needed prior to creating products.



Lender Information

Loan(s): \*

\$381,457.87: Angela's (Test) Lending Co.

Insurance Clause:

Its successors and/or assigns as their interests may appear

## Title Search

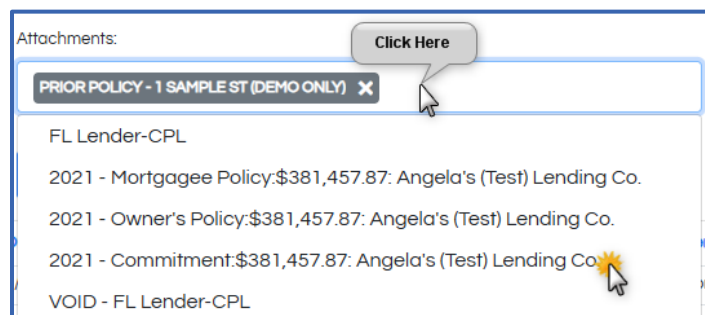
**Search Type:** Select the type of search from the options provided by The Fund in the drop-down.

*Note: Select the Update Branch Product to order updates for the file as often as needed.*

**Need by Date:** Defaults to 3 days from the current date; adjust as necessary

**Attachments** (optional): Items in the file's **Documents** section may be attached to the order

- Click inside the **Attachments** field and select the document(s) from the list to include with the order
- Click on the “x” to remove a document from being attached to the order.



Attachments:

**PRIOR POLICY - 1 SAMPLE ST (DEMO ONLY)** X

Click Here

FL Lender-CPL

2021 - Mortgagee Policy:\$381,457.87: Angela's (Test) Lending Co.

2021 - Owner's Policy:\$381,457.87: Angela's (Test) Lending Co.

2021 - Commitment:\$381,457.87: Angela's (Test) Lending Co.

VOID - FL Lender-CPL

**Notes:** Enter notes to be sent to The Fund with the order

- Notes submitted with orders will be recorded in the **Notes** section.

*Note: The Fund currently does not support searches for multiple properties in a single file. TitleFusion will automatically add a note with the additional property details when a file consists of multiple properties.*

**Submit Search Request:** Click the button to place the Title Search order

- Order details will be displayed in the grid.
- Orders may be managed/tracked in the **View Existing Orders** section of **Orders & Searches**.

Ordered Date	Due Date	Completed Date	Remarks	Return Code
2/6/2025 3:13:07 PM	2/9/2025 3:10:08 PM		Commercial - Update Branch Product (39B)	476779Q-4
2/5/2025 10:51:34 AM	2/8/2025 10:50:17 AM		Commercial - Update Branch Product (39B)	476779Q-3
2/5/2025 10:49:29 AM	2/8/2025 10:46:12 AM		Commercial - Update Branch Product (39B)	476779Q-2
1/16/2025 3:14:20 PM	2/3/2025 12:00:00 AM		Commercial - Commitment A&B, Commercial (C20)	476779Q

## Process Completed Title Search Orders

- Under the **Commitment** tab, select **XML Reports**.
- The **TITLE REPORTS** tab displays all title reports available to import. Search and/or select the **Title** to Import the desired report.

Title	Received From	Received On	Processed
CWA_FEB05_39B	TheFund	02/05/2025 04:41 PM	
CWA_FEB05_39B	TheFund	02/05/2025 04:38 PM	
CWA_FEB05_39B	TheFund	02/05/2025 04:34 PM	
CWA_ACCU13	TheFund	01/16/2025 03:11 PM	
TF-15004	TheFund	01/15/2025 06:00 PM	
FL-399-TF	TheFund	01/07/2025 10:08 AM	

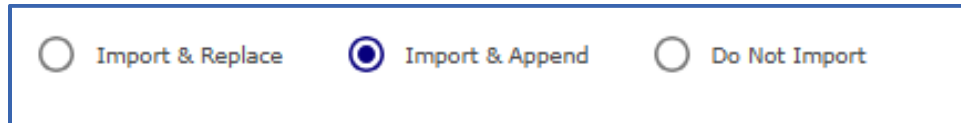
Page 1 of 10 (96 items) < 1 2 3 4 5 6 7 8 9 10 >

☒ Show New ☐ Show All DELETE REPORT

3. Use the radio buttons to manage information in each section to Import\*\*\*.

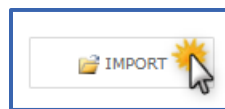
\*\*\* Note: The Fund does not return Standard E&Rs; users may use a set to easily add them to the file before importing & appending the title report's E&Rs.

- **Import & Replace** overrides any existing information in the corresponding section of the file.
- **Import & Append** adds the details to existing information in the corresponding section of the file.
- **Do Not Import** prevents report details from being included in the corresponding section of the file.



A horizontal row of three radio buttons. The first is labeled 'Import & Replace' and is unselected. The second is labeled 'Import & Append' and is selected (indicated by a blue dot). The third is labeled 'Do Not Import' and is unselected.

4. Select the **IMPORT** button at the bottom of the page. Supporting documents from the vendor will automatically be loaded to the file.



## CPLs

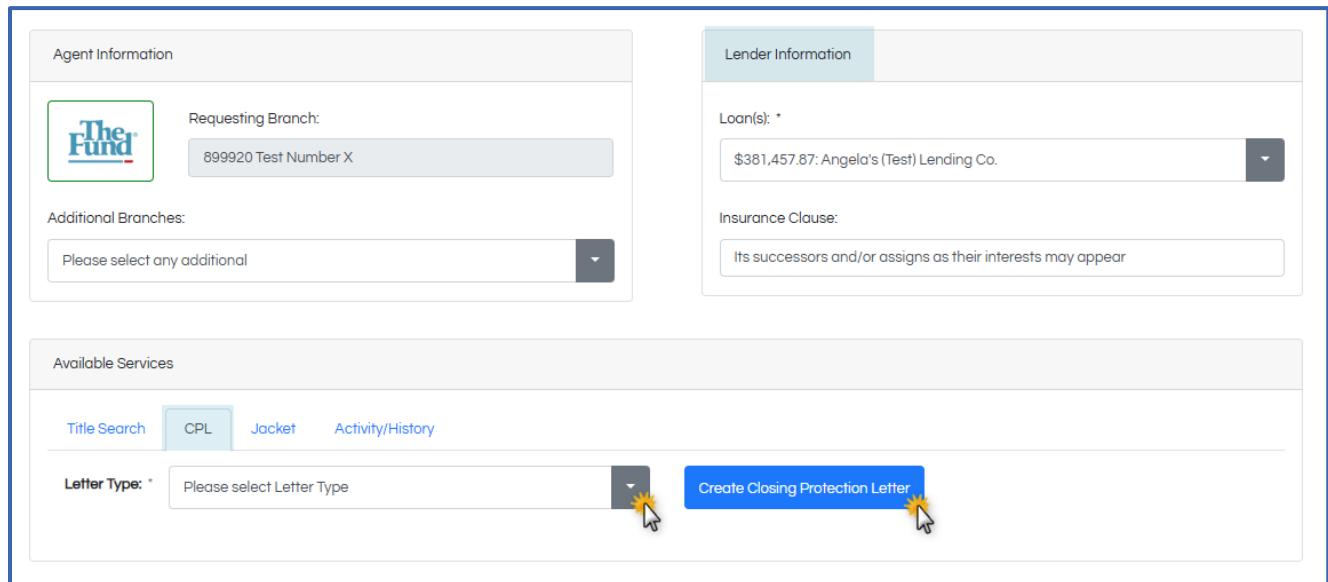
**Lender Information:** Select and/or modify details for the request.

**Letter Type:** Select the letter type.





**Create Closing Protection Letter:** Click the button to request the CPL

- Document Viewer displays the CPL
- Request details are recorded in **Activity/History**
- PDF is saved to **Documents**

*Note: Although a CPL cannot be manually voided, subsequent CPL requests for a file will automatically void the previous version.*



A screenshot of a web form for requesting a Closing Protection Letter (CPL). The form is divided into two main sections: 'Agent Information' and 'Lender Information'. The 'Agent Information' section includes a logo for 'The Fund' and a 'Requesting Branch' field with the value '899920 Test Number X'. Below this is an 'Additional Branches' dropdown menu. The 'Lender Information' section includes a 'Loan(s): \*' dropdown menu with the value '\$381,457.87: Angela's (Test) Lending Co.' and an 'Insurance Clause' field with the value 'Its successors and/or assigns as their interests may appear'. At the bottom of the form, there is an 'Available Services' section with tabs for 'Title Search', 'CPL', 'Jacket', and 'Activity/History'. The 'CPL' tab is selected. Below the tabs is a 'Letter Type: \*' dropdown menu with the value 'Please select Letter Type'. To the right of the dropdown is a blue button labeled 'Create Closing Protection Letter'. A mouse cursor is pointing at the button.

Available Services					
Title Search   CPL   Jacket   Activity/History					
ID	Activity	Description	Fund Reference	ORT Reference	
2798	2/6/2025 15:13:07	Commercial - Update Branch Product (39B) OrderNumber: 476779Q-4	476779Q-4	11349	
2794	2/5/2025 10:51:34	Commercial - Update Branch Product (39B) OrderNumber: 476779Q-3	476779Q-3	11333	
2793	2/5/2025 10:49:29	Commercial - Update Branch Product (39B) OrderNumber: 476779Q-2	476779Q-2	11332	
2786	1/30/2025 17:10:52	FL Lender-CPL <b>New (active) CPL</b>	2025-1000150	960964714	
2766	1/16/2025 15:36:10	2021 - Mortgagee Policy:\$381,457.87: Angela's (Test) Lending Co.	7060557	M21-7060557	
2765	1/16/2025 15:32:25	2021 - Owner's Policy:\$381,457.87: Angela's (Test) Lending Co.	7087202	O21-7087202	
2764	1/16/2025 15:28:12	2021 - Commitment:\$381,457.87: Angela's (Test) Lending Co.	7052343	C21-7052343	
2763	1/16/2025 15:21:12	FL Lender-CPL <b>Original CPL - automatically voided with new request</b>	2025-1000084	960963793	
2762	1/16/2025 15:14:20	Commercial - Commitment A&B, Commercial (C20) OrderNumber: 476779Q	476779Q	11178	

## Jackets

**Effective Date:** Defaults to the file's selected Closing Date or the current date.


**Policy Type:** Select the jacket type for the order.

- If requesting a Mortgagee Policy, select details in the **Lender Information** section *prior* to requesting the jacket.

**Create Policy Jacket:** Click the button to request the Jacket.

- Document Viewer displays the Jacket
- Request details are recorded in **Activity/History**
- PDF is saved to **Documents**
- Commitment Jacket numbers are saved to the **Title Vested** section of the **Commitment** Module.
- Policy Jacket numbers are saved to the **Policy Recitals** section of the **Policy** Module.

Agent Information



Requesting Branch:

899920 Test Number X

Additional Branches:

Please select any additional

Lender Information

Loan(s): \*

\$381,457.87: Angela's (Test) Lending Co.

Insurance Clause:

Its successors and/or assigns as their interests may appear

Available Services

Title Search   CPL   Jacket   Activity/History

Effective Date: 02/03/2025 12:00 AM
Policy Type: \* ... Please select a form

Create Policy Jacket

Tasks & To Do

File Manager

Application

Documents

Commitment

Charges & Fees

ABC : FL

TF-15010A

GO

TITLE VESTED

REQUIREMENTS

EXCEPTIONS

ENDORSEMENTS

MORTGAGES

XML REP

CPN/Commitment Dates

Edit

LOAD FILE

Closing Protection Number:

Commitment Jacket Number: C21-7052422

Tasks & To Do

File Manager

Application

Documents

Commitment

Charges & Fees

Closing

Policy

TF : FL

TF-15010

GO

RECORDINGS

RECITALS

EXCEPTIONS

ENDORSEMENTS

CHARGES & FEES

CLOSING SYSTEM

CLOS

Edit

LOAD FILE

Policy Issued Date:

Deed Recital

Edit

Owner's Policy No.: O21-7087202

Recorded:

Mortgage Policy

Edit

Mortgage Policy: M21-7060557

Recorded:


Loan No.: 1162515010





## Voiding Jackets

- Jackets may **NOT** be voided through the integration.
- To void a Jacket, users **MUST** send an email to [formcontrols@thefund.com](mailto:formcontrols@thefund.com) & reference the Policy Jacket number.

## Activity/History

The following details are recorded for all products requested for the file through the integration:

- Activity:** Date and time the product was requested
- Description:** Product description
- Fund Reference:** Number associated with the request
- ORT Reference:** Serial number associated with the product (ex. Policy Jacket number)
- PDF**  icon: Click to view product in the Document viewer

Available Services					
Title Search   CPL   Jacket   Activity/History					
ID	Activity	Description	Fund Reference	ORT Reference	
2798	2/6/2025 15:13:07	Commercial - Update Branch Product (39B) OrderNumber: 476779Q-4	476779Q-4	11349	
2794	2/5/2025 10:51:34	Commercial - Update Branch Product (39B) OrderNumber: 476779Q-3	476779Q-3	11333	
2793	2/5/2025 10:49:29	Commercial - Update Branch Product (39B) OrderNumber: 476779Q-2	476779Q-2	11332	
2786	1/30/2025 17:10:52	FL Lender-CPL	2025-1000150	960964714	
2766	1/16/2025 15:36:10	2021 - Mortgagee Policy:\$381,457.87: Angela's (Test) Lending Co.	7060557	M21-7060557	
2765	1/16/2025 15:32:25	2021 - Owner's Policy:\$381,457.87: Angela's (Test) Lending Co.	7087202	O21-7087202	
2764	1/16/2025 15:28:12	2021 - Commitment:\$381,457.87: Angela's (Test) Lending Co.	7052343	C21-7052343	
2763	1/16/2025 15:21:12	FL Lender-CPL	2025-1000084	960963793	
2762	1/16/2025 15:14:20	Commercial - Commitment A&B, Commercial (C20) OrderNumber: 476779Q	476779Q	11178	