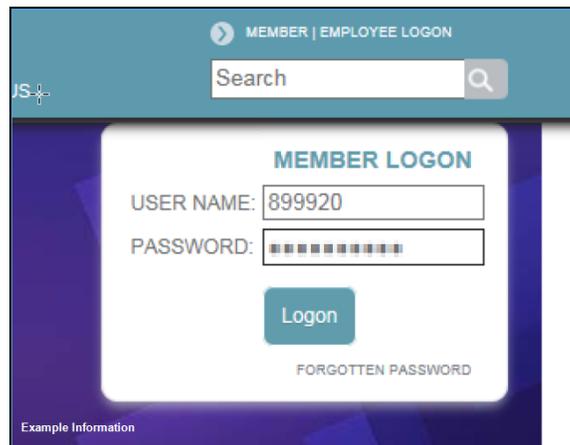


The Fund

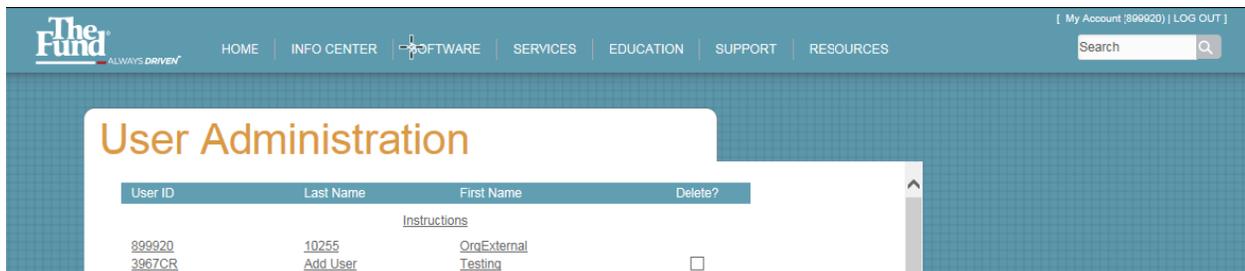
Ordering CPLs and Jackets

Get Set Up to Order through Closers' Choice

1. Make sure your office administrator has set up access for users to order through the integration. **Please note:** The following steps are from The Fund and subject to change. The office administrator needs to log on to The Fund's website using their administrator credentials.

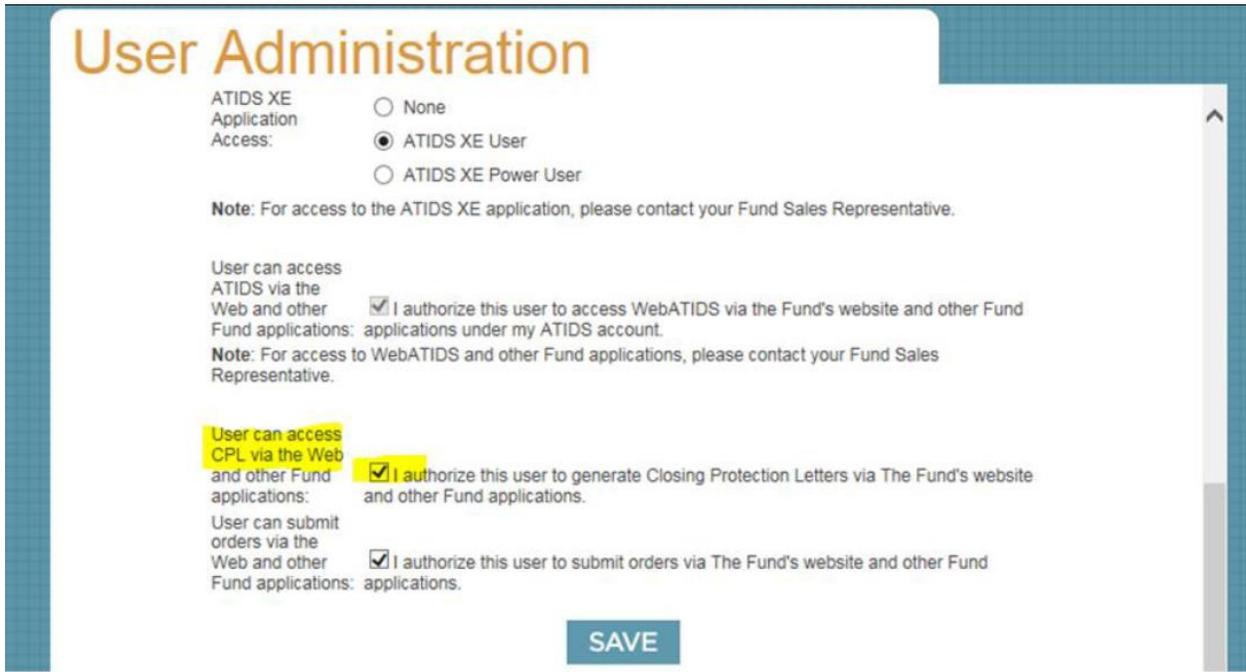


2. Upon logging in, the administrator will see a list of users to select from. They will need to make the appropriate adjustments for each user that will be using the integration. Click on the User ID to open the user's information.



User ID	Last Name	First Name	Delete?
899920	10255	OrgExternal	
3967CR	Add User	Testing	<input type="checkbox"/>

3. To be able to use the CPL integration, scroll down, almost to the bottom of the page to a menu option that reads “User can CPL via the web and other Fund applications.” Make sure to click the check box next to the option “I authorize this user to generate Closing Protection Letters via the Fund’s website and other Fund applications.”



User Administration

ATIDS XE Application Access: None ATIDS XE User ATIDS XE Power User

Note: For access to the ATIDS XE application, please contact your Fund Sales Representative.

User can access ATIDS via the Web and other Fund applications: I authorize this user to access WebATIDS via the Fund’s website and other Fund applications under my ATIDS account.

Note: For access to WebATIDS and other Fund applications, please contact your Fund Sales Representative.

User can access CPL via the Web and other Fund applications: I authorize this user to generate Closing Protection Letters via The Fund’s website and other Fund applications.

User can submit orders via the Web and other Fund applications: I authorize this user to submit orders via The Fund’s website and other Fund applications.

SAVE

4. To be able to receive policy jackets through the integration, under the “User Access Rights” heading, find the sub-section named “Doubletime eSolutions Access.” Select the radio button for the option that says, “Electronic Delivery of Fund Forms.”

User Administration

Edit User Information

(see below for instructions)

User ID: 3967CR (899920)
(User IDs and Passwords are case-sensitive)

Password:

Confirm Password:

Email:

Confirm Email:

First Name:

Last Name:

User Role in the Organization

Please tell us about your role(s) in your office. You may choose multiple roles, if necessary.

Attorney Member Paralegal
 Office Manager Technical Contact
 Other

User Access Rights

User can access FundNet:

DoubleTime eSolutions Access:

- None
- Commitment Number Request Only
- Electronic Delivery of Fund Forms

User can access DoubleTime's Electronic Payment service

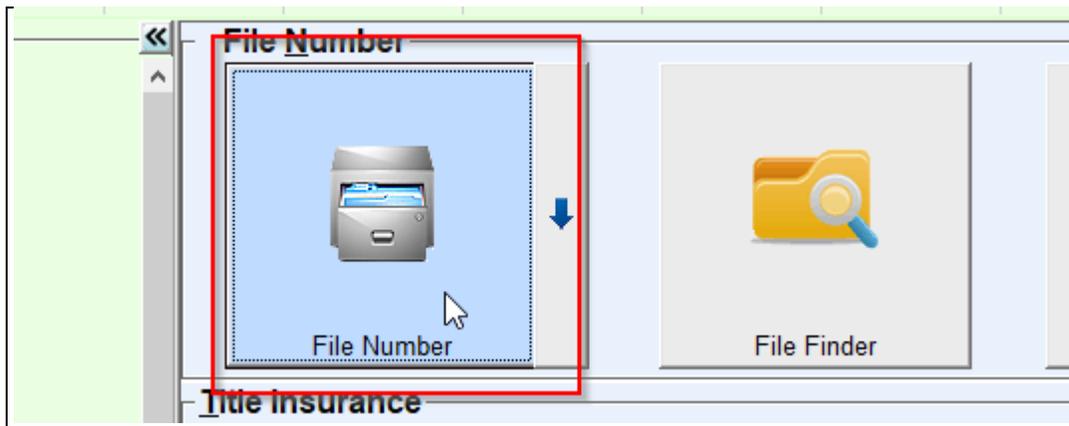
AUTHORIZATION FOR ELECTRONIC PAYMENTS: By granting user access to the Attorneys' Title Fund Services, LLC, Electronic Payment service in DoubleTime or any other Attorneys' Title Fund Services, LLC electronic payment service, you are giving permission to this user to authorize Attorneys' Title Fund Services, LLC to initiate an electronic debit to the financial account the user specifies in the amount the user requests.

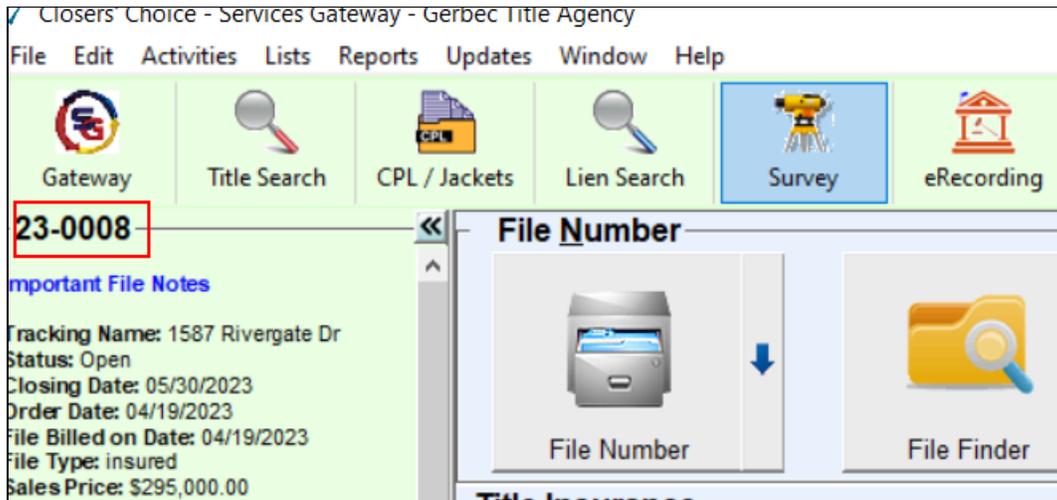
User can access ePolicyManager on FundNet

5. Make sure to save your changes by clicking the Save button on the bottom of the screen before closing. Make any changes to any other users before logging off the Fund's website. Your users can now proceed to the next steps in Closers' Choice to order CPLs and Jackets.

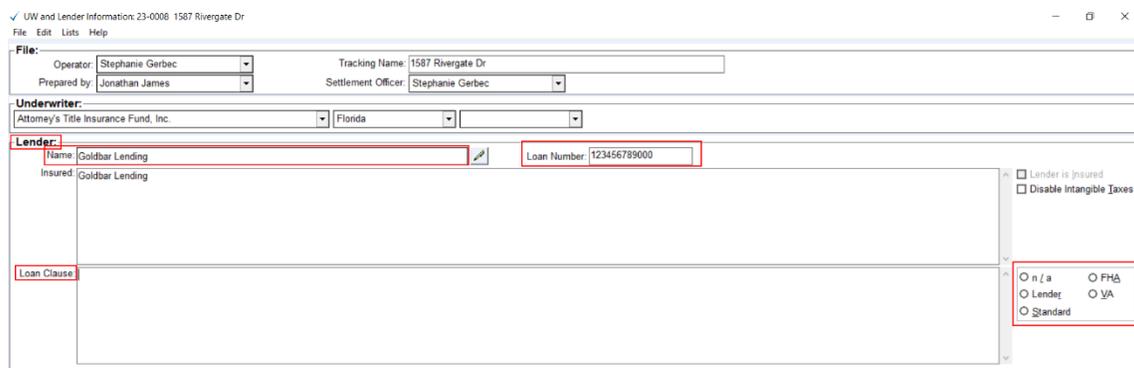
Information in Your File

1. From the main screen of Closers' Choice, open the file you wish to use or create a new file and input the information available.





2. If you are ordering a Lender's CPL (Closing Protection Letter), make sure to have your Lender's name, address, loan clause and a loan number entered in your file. You can do this from the Underwriter button on the main screen. When entering in your loan clause as provided by the lender on the file, you can type it in manually or select using the available radio buttons to choose from a loan clause associated with your lender's entry in address book or the pre-typed options.



3. If your lender has a specific CPL address, they want to use that is different from the address you have on file for your lender already, click on the pen icon next to the lender's name field. In the window that appears you can enter or update the CPL information for this file. **Note:** If you wish to edit the CPL address for this file only, you can exit out of this window when done. If you wish to update your address and use this CPL address in the future, click on the green "Update Address Book" button.

Edit Lender: 23-0008 1587 Rivergate Dr

Lender Additional Contacts

Member Quick Name: GOLDBAR Update Address Book

Name: Goldbar Lending

Address: 1998 Main Street

City: Jacksonville State: Florida Zip: 32258-__

ST Lic.: NMLS ID:

Contact Information

Name: Sasha King

Office: (904) 111-1111 Ext: eMail: sking@goldbar.com

Cell: ST Lic.:

Fax: NMLS ID:

CPL Information

Name: Goldbar Lending

Address: 1998 Main Street

City: Jacksonville State: Florida Zip: 32258-__

4. Select your underwriter on the file before ordering your CPLs or policy jackets. This is a **required** step.

UW and Lender Information: 23-0008 1587 Rivergate Dr

File Edit Lists Help

File: Operator: Stephanie Gerbec Tracking Name: 1587 Rivergate Dr

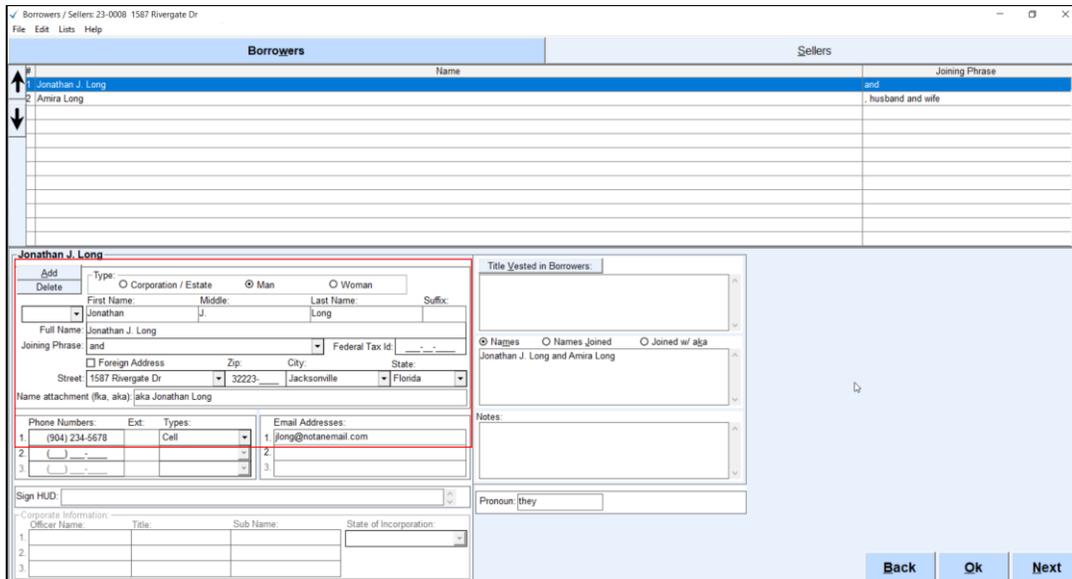
Prepared by: Jonathan James Settlement Officer: Stephanie Gerbec

Underwriter: Attorney's Title Insurance Fund, Inc. Florida

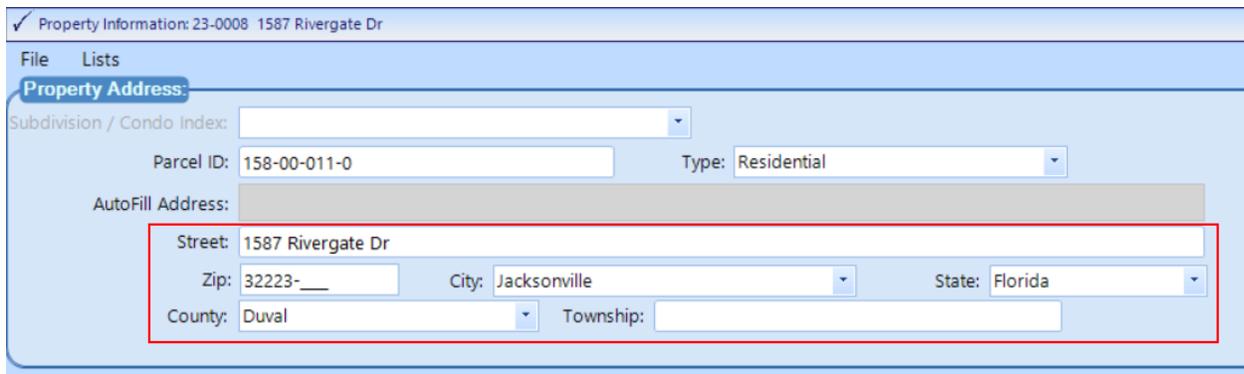
Lender: Name: Goldbar Lending Loan Number: 123456789000

Insured: Goldbar Lending

5. Enter your buyer's and seller's information.



6. Verify that you have all your property information in the property screen, especially the street address, city, state, and zip code.



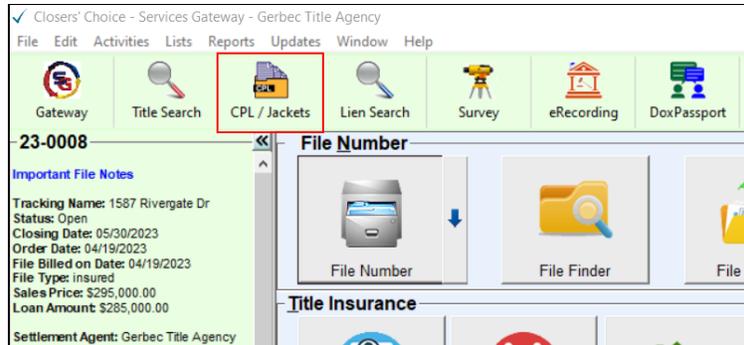
- In your issued/effective window, make sure you have selected the checkbox for what types of policies you will be issuing on your file, as applicable. Enter in the coverage amount as well or select the checkbox to pull in the same amount as the sales price/loan amount.

<input checked="" type="checkbox"/> Loan Policy: Loan Amount: <input type="text" value="285,000.00"/> <input checked="" type="checkbox"/> Policy Same as Loan Amount Policy Coverage: <input type="text" value="285,000.00"/> <input type="button" value="Additional Information"/>	<table border="1"> <tr> <th>Document 1</th> <th>Document 2</th> <th>Document 3</th> </tr> <tr> <td colspan="3"> <input type="text"/> Dated: <input type="text"/> Recorded: <input type="text"/> @ <input type="text"/> Book: <input type="text"/> Page: <input type="text"/> </td> </tr> </table>	Document 1	Document 2	Document 3	<input type="text"/> Dated: <input type="text"/> Recorded: <input type="text"/> @ <input type="text"/> Book: <input type="text"/> Page: <input type="text"/>		
Document 1	Document 2	Document 3					
<input type="text"/> Dated: <input type="text"/> Recorded: <input type="text"/> @ <input type="text"/> Book: <input type="text"/> Page: <input type="text"/>							
<input checked="" type="checkbox"/> Owners Policy: Sales Price: <input type="text" value="295,000.00"/> <input checked="" type="checkbox"/> Policy Same as Sales Price Policy Coverage: <input type="text" value="295,000.00"/> <input type="button" value="Additional Information"/>	<table border="1"> <tr> <th>Document 1</th> <th>Document 2</th> <th>Document 3</th> </tr> <tr> <td colspan="3"> <input type="text"/> Dated: <input type="text"/> Recorded: <input type="text"/> @ <input type="text"/> Book: <input type="text"/> Page: <input type="text"/> </td> </tr> </table>	Document 1	Document 2	Document 3	<input type="text"/> Dated: <input type="text"/> Recorded: <input type="text"/> @ <input type="text"/> Book: <input type="text"/> Page: <input type="text"/>		
Document 1	Document 2	Document 3					
<input type="text"/> Dated: <input type="text"/> Recorded: <input type="text"/> @ <input type="text"/> Book: <input type="text"/> Page: <input type="text"/>							

- For ordering your jackets, you are **required** to have an effective date filled out in the issued/effective window.

<table border="1"> <tr> <th>Document 1</th> <th>Document 2</th> <th>Document 3</th> </tr> <tr> <td colspan="3"> <input type="text"/> Dated: <input type="text"/> Recorded: <input type="text"/> @ <input type="text"/> Book: <input type="text"/> Page: <input type="text"/> </td> </tr> </table>	Document 1	Document 2	Document 3	<input type="text"/> Dated: <input type="text"/> Recorded: <input type="text"/> @ <input type="text"/> Book: <input type="text"/> Page: <input type="text"/>			<table border="1"> <tr> <th colspan="2">Policy</th> </tr> <tr> <td>Number:</td> <td><input type="text"/></td> </tr> <tr> <td>Issued:</td> <td><input type="text"/></td> </tr> <tr> <td>Effective:</td> <td><input type="text" value="Jul 27, 2023 12:20:45 PM"/></td> </tr> </table>	Policy		Number:	<input type="text"/>	Issued:	<input type="text"/>	Effective:	<input type="text" value="Jul 27, 2023 12:20:45 PM"/>
Document 1	Document 2	Document 3													
<input type="text"/> Dated: <input type="text"/> Recorded: <input type="text"/> @ <input type="text"/> Book: <input type="text"/> Page: <input type="text"/>															
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Document 1	Document 2	Document 3													
<input type="text"/> Dated: <input type="text"/> Recorded: <input type="text"/> @ <input type="text"/> Book: <input type="text"/> Page: <input type="text"/>															
Policy															
Number:	<input type="text"/>														
Issued:	<input type="text"/>														
Effective:	<input type="text" value="Jul 27, 2023 12:20:51 PM"/>														

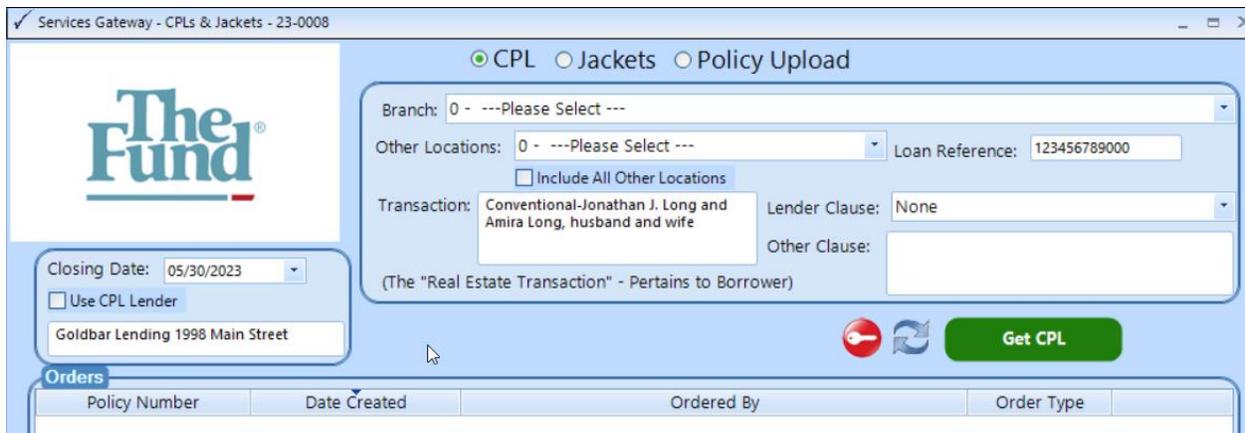
- Select the CPL /Jackets button from the Services Gateway toolbar at the top of the main screen of Closers' Choice.



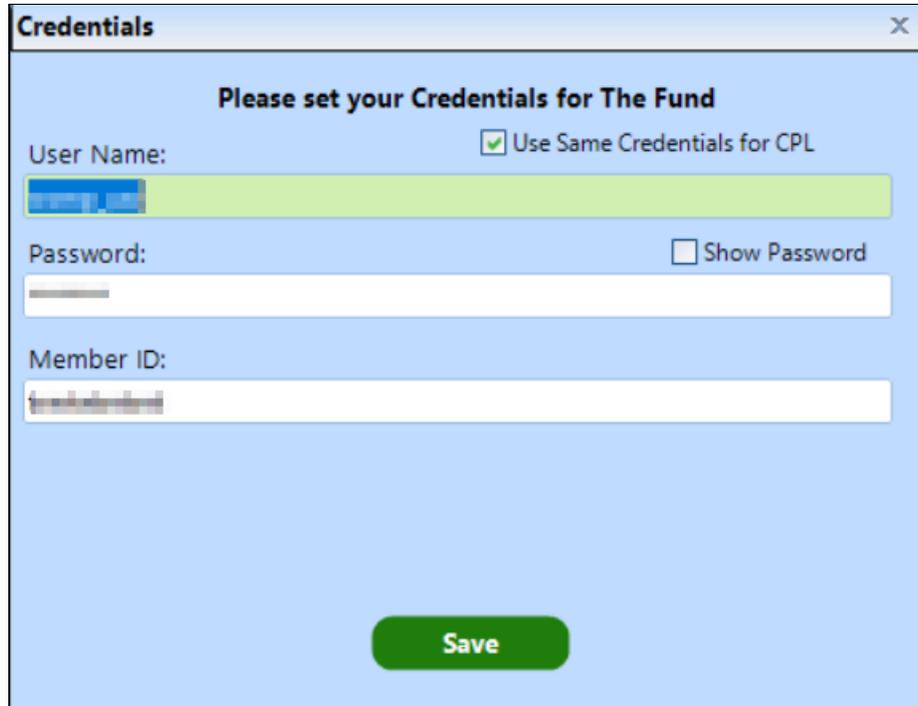
- A screen appears for you to choose which underwriter you will be ordering from. Select "The Fund" to order products from them.



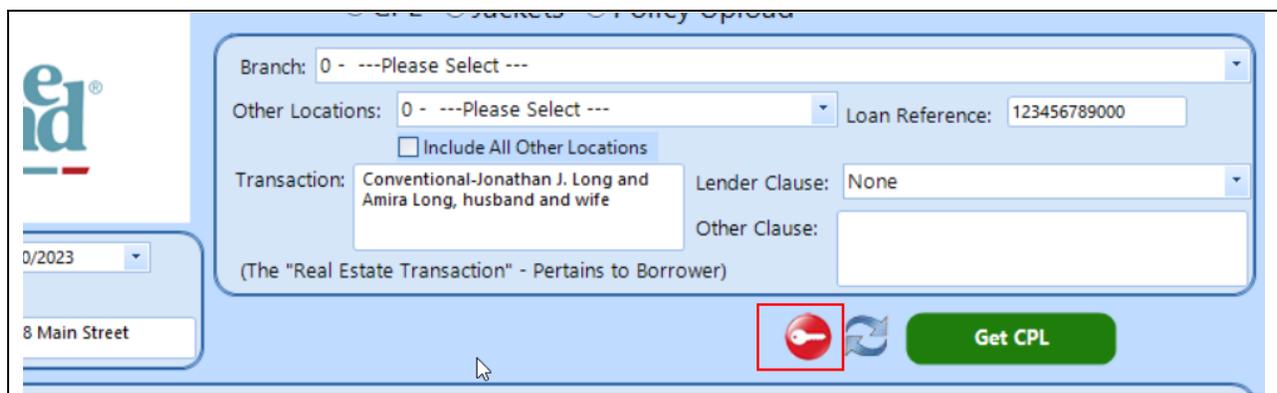
- The CPL/Jackets order form appears.



12. First time users will see a pop-up window. This is the 'Credentials' window. Enter in the credentials provided by The Fund. These are the credentials used to access the Fund's website. If you do not have these from The Fund, please contact them for assistance.

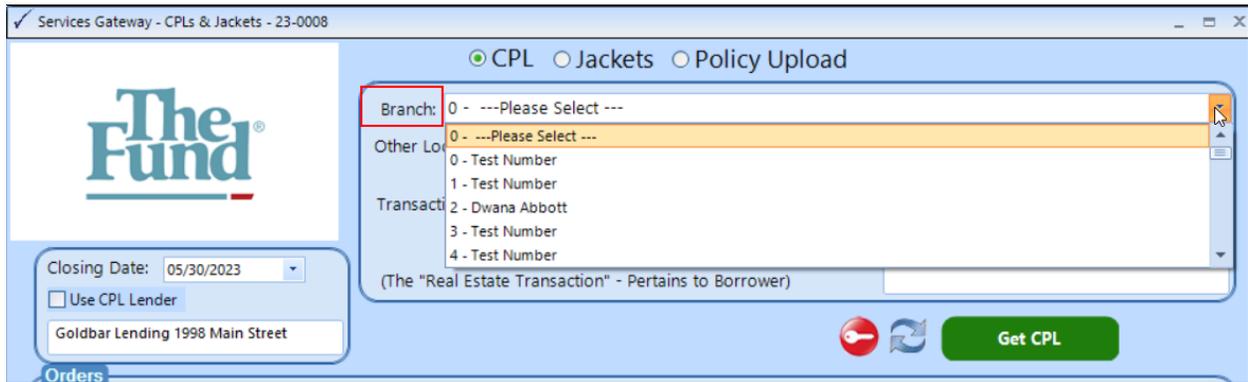


13. If you ever need to change or update your credentials, select the red key button on the order form. The pop up will appear again where you can update your credentials as necessary. Be sure to click save when finished.

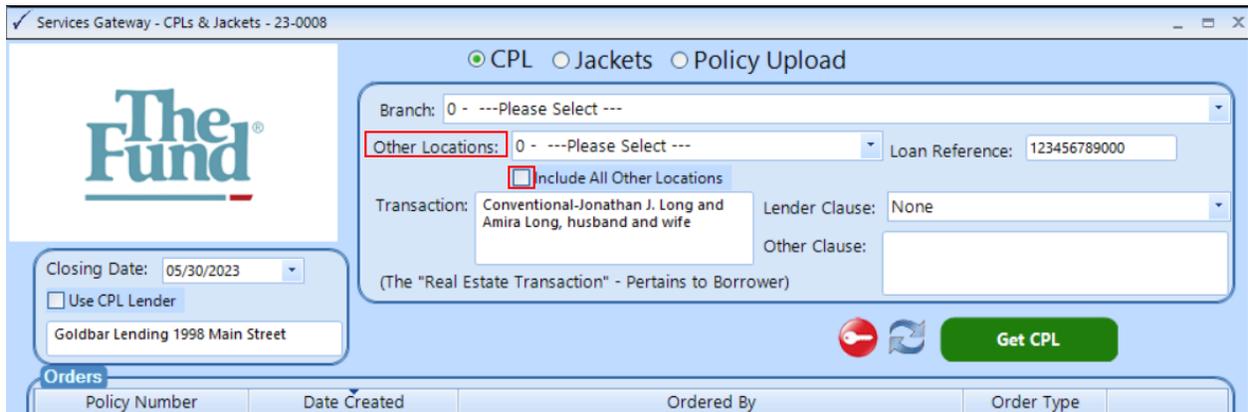


Ordering Closing Protection Letters

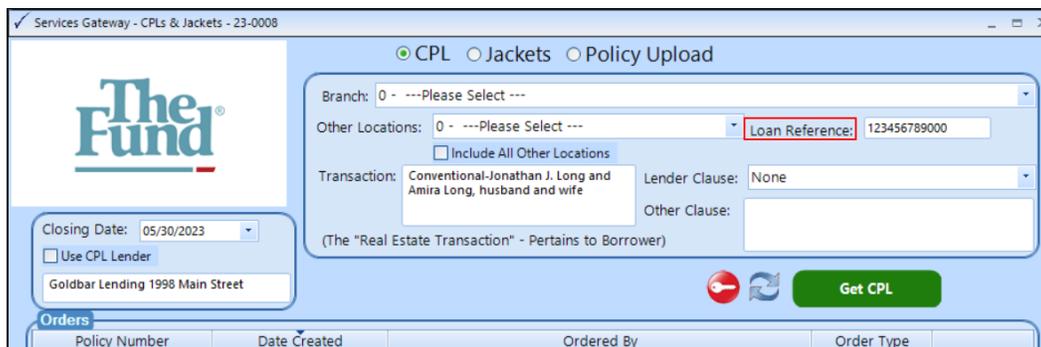
1. The order form window automatically opens to the CLP order form. If you have more than one branch office or office location, select your appropriate location from the 'branch' drop-down menu.



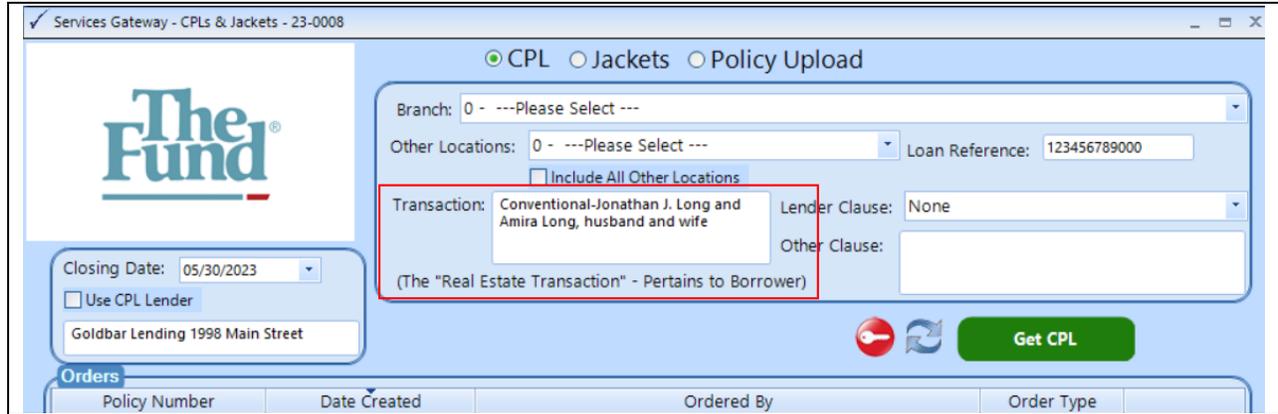
2. You can select another location from the "Other Locations" drop-down menu to print on the CPL or you can select the "include all other locations" checkbox.



3. The loan number on the file will pull into the loan reference field automatically.



- The transaction field should include the loan type from your file, along with the buyer's name and joining phrase as entered in your file. You can modify or add to this field if needed but note that it will not add or update that information on your file.



Services Gateway - CPLs & Jackets - 23-0008

CPL Jackets Policy Upload

Branch: 0 - ---Please Select ---

Other Locations: 0 - ---Please Select --- Loan Reference: 123456789000

Include All Other Locations

Transaction: Conventional-Jonathan J. Long and Amira Long, husband and wife

Lender Clause: None

Other Clause:

(The "Real Estate Transaction" - Pertains to Borrower)

Closing Date: 05/30/2023

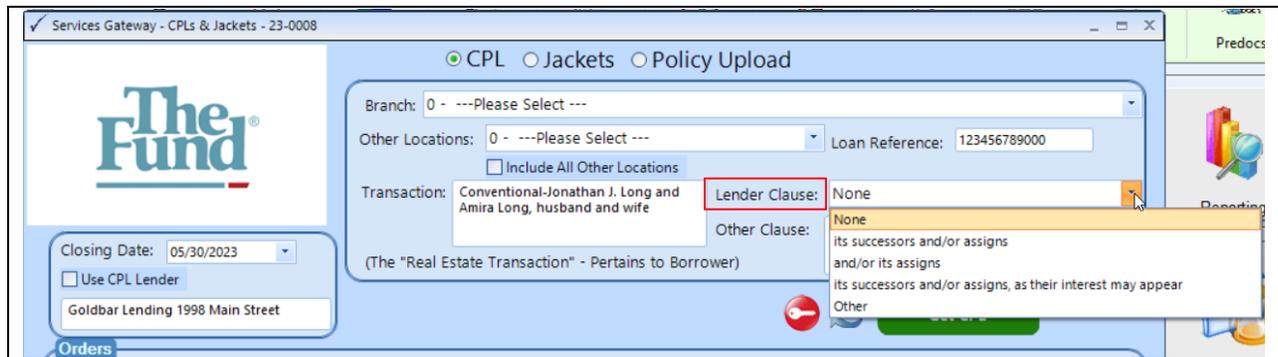
Use CPL Lender

Goldbar Lending 1998 Main Street

Get CPL

Policy Number	Date Created	Ordered By	Order Type
---------------	--------------	------------	------------

- Select your lender clause in the 'lender clause' drop-down menu.



Services Gateway - CPLs & Jackets - 23-0008

CPL Jackets Policy Upload

Branch: 0 - ---Please Select ---

Other Locations: 0 - ---Please Select --- Loan Reference: 123456789000

Include All Other Locations

Transaction: Conventional-Jonathan J. Long and Amira Long, husband and wife

Lender Clause: None

Other Clause:

(The "Real Estate Transaction" - Pertains to Borrower)

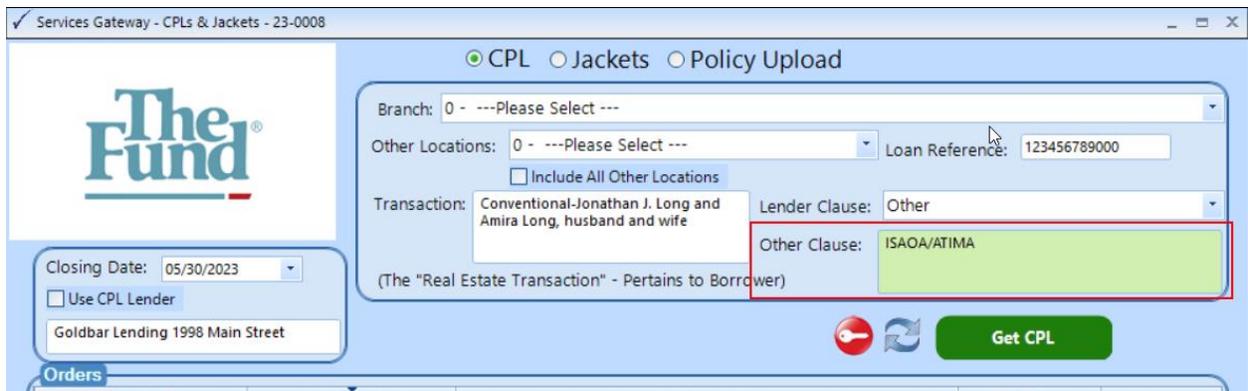
Closing Date: 05/30/2023

Use CPL Lender

Goldbar Lending 1998 Main Street

Get CPL

- If you selected 'Other' as the lender clause, add the wording to the other clause field below.



Services Gateway - CPLs & Jackets - 23-0008

CPL Jackets Policy Upload

Branch: 0 - ---Please Select ---

Other Locations: 0 - ---Please Select --- Loan Reference: 123456789000

Include All Other Locations

Transaction: Conventional-Jonathan J. Long and Amira Long, husband and wife

Lender Clause: Other

Other Clause: ISAOA/ATIMA

(The "Real Estate Transaction" - Pertains to Borrower)

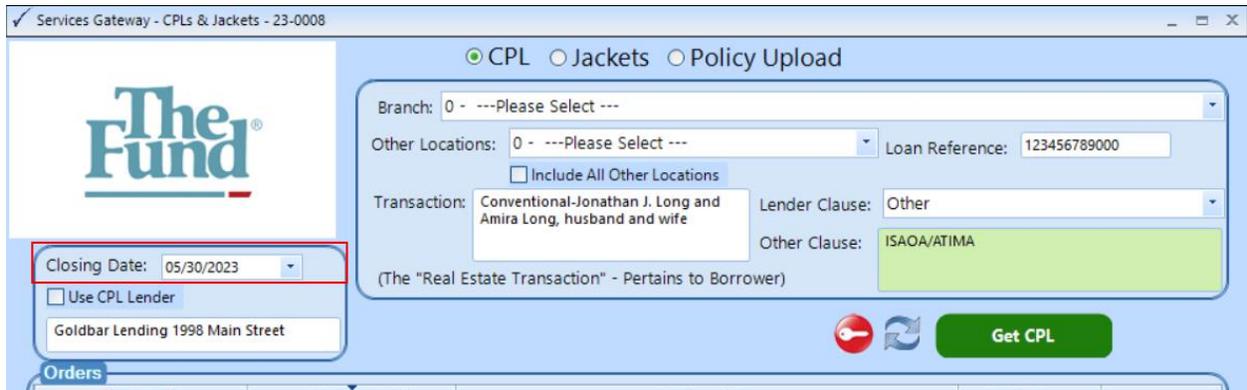
Closing Date: 05/30/2023

Use CPL Lender

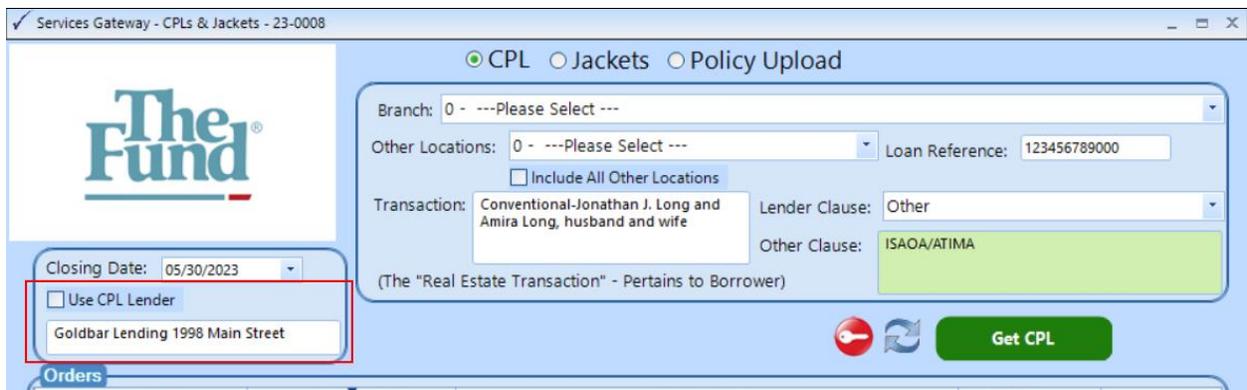
Goldbar Lending 1998 Main Street

Get CPL

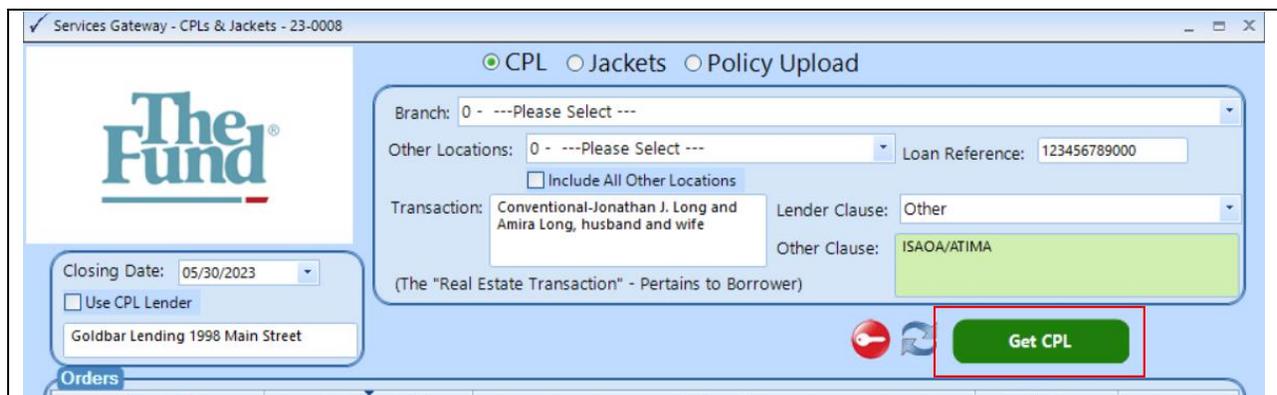
7. Your closing date will pull into the 'closing date' field.



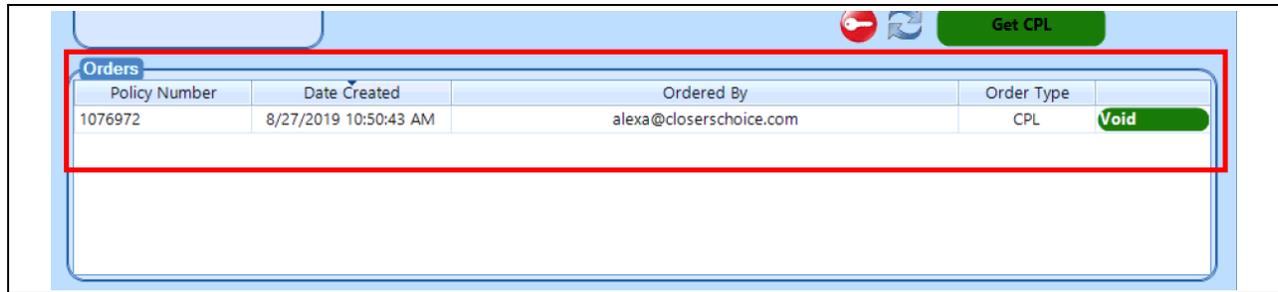
8. The lender's address will populate in the field below the closing date. If you prefer to use the CPL address entered in the address book, click the 'Use CPL lender' checkbox.



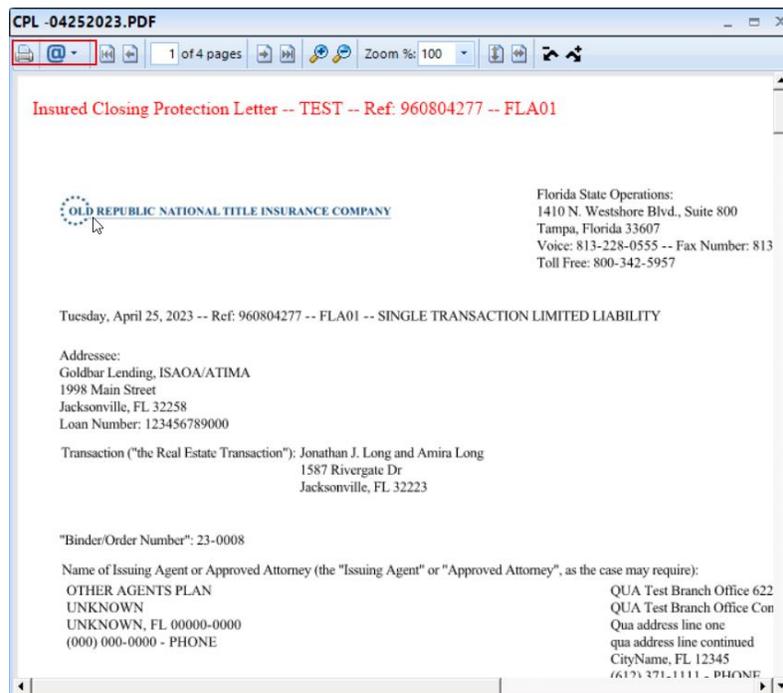
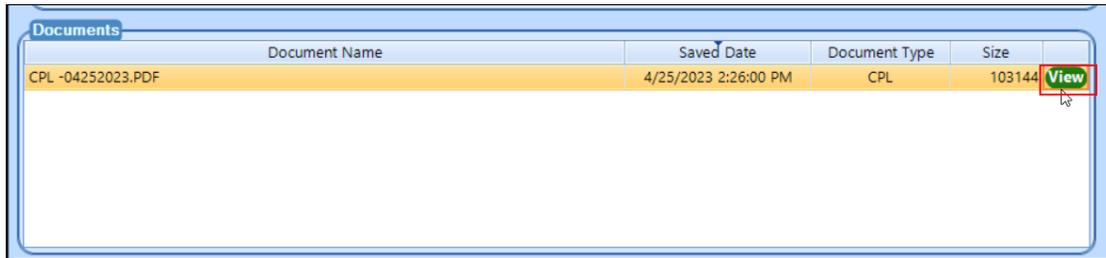
9. Once you have finished your selections, click the green 'Get CPL' button to place your order with the Fund.



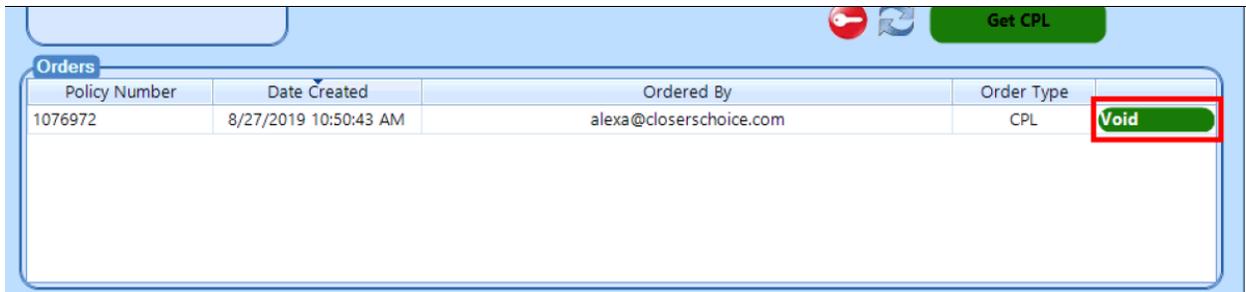
- Your CPL will now appear in the Orders section of this window. It will also be saved automatically in your saved documents in your file in Closers' Choice. You can print or email the CPL from there.



- If you have a feature called Docs in Cloud turned on, you can view the CPL in the bottom Documents section of this same window. Click on the green View button. It will open in a new window where you can review it, print, and email it. It is still saved to your file automatically.

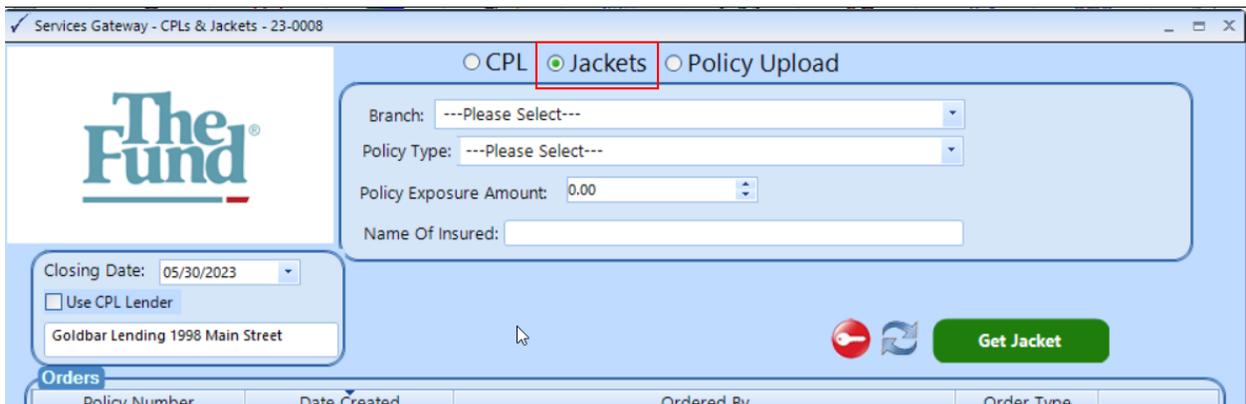


12. If you need to void your CPL, click on the green Void button. You can re-order your CPL afterwards if you need to.

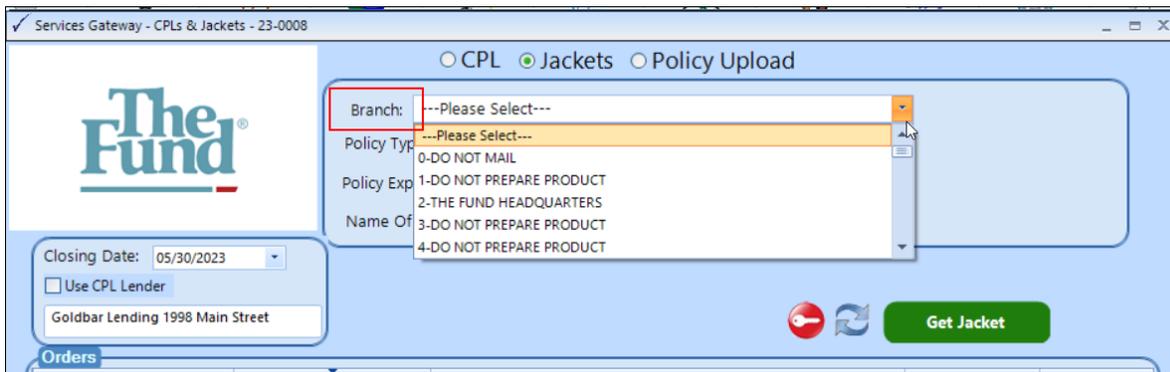


Ordering Policy Jackets

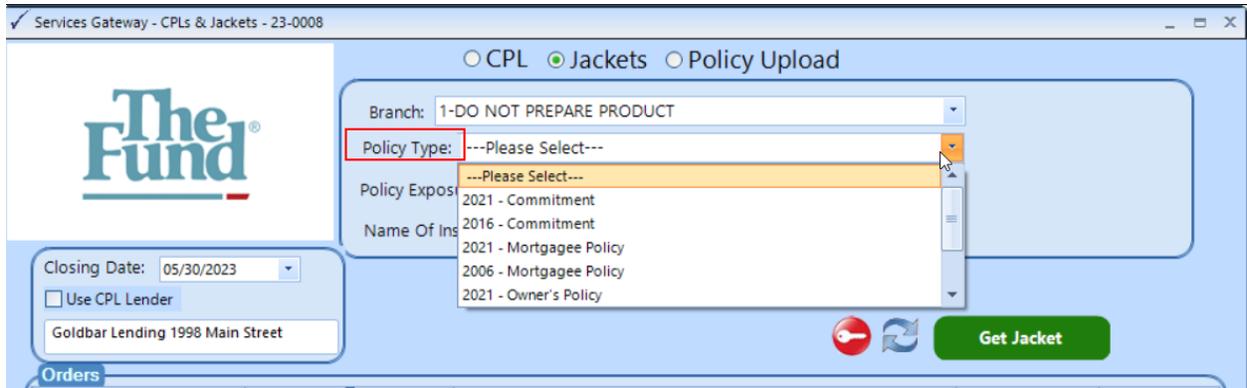
1. The jackets order form can be found directly to the right of the CPL option.



2. There are drop-down menus to interact with. Using the Branch drop-down menu, select your branch/office location from the list.



3. Select your policy type in the second drop-down menu.



Services Gateway - CPLs & Jackets - 23-0008

CPL Jackets Policy Upload

Branch: 1-DO NOT PREPARE PRODUCT

Policy Type: ---Please Select---

Policy Exposure: ---Please Select---

Name Of Insured: 2021 - Commitment
2016 - Commitment
2021 - Mortgagee Policy
2006 - Mortgagee Policy
2021 - Owner's Policy

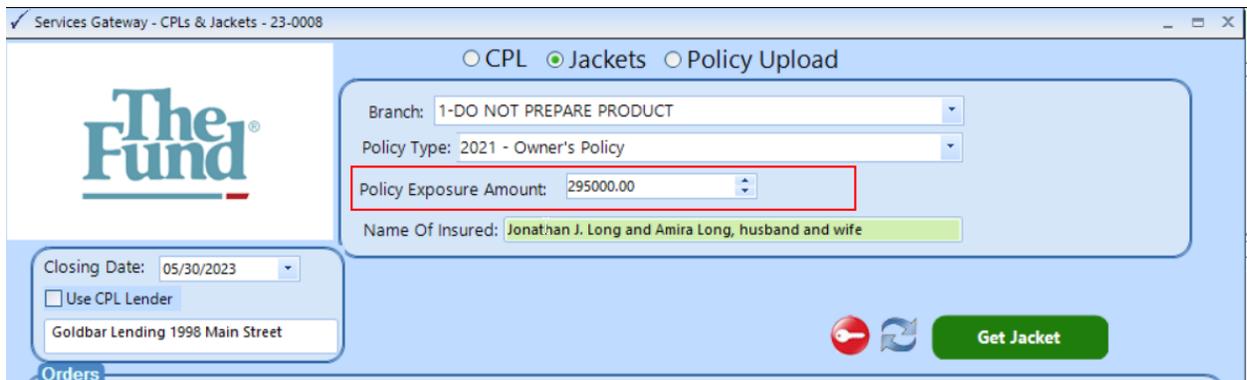
Closing Date: 05/30/2023

Use CPL Lender

Goldbar Lending 1998 Main Street

Get Jacket

4. The policy exposure amount should be pulled in now from your file's policy coverage amount, depending on which policy type you selected.



Services Gateway - CPLs & Jackets - 23-0008

CPL Jackets Policy Upload

Branch: 1-DO NOT PREPARE PRODUCT

Policy Type: 2021 - Owner's Policy

Policy Exposure Amount: 295000.00

Name Of Insured: Jonathan J. Long and Amira Long, husband and wife

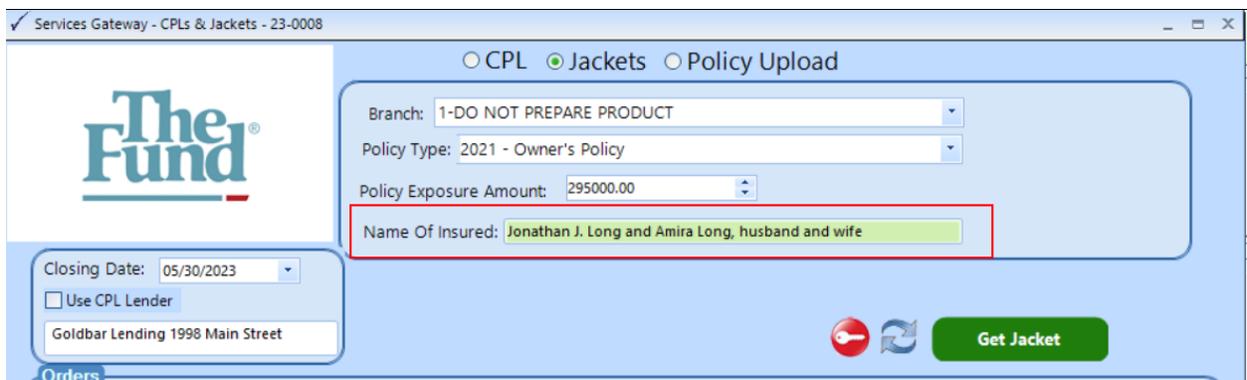
Closing Date: 05/30/2023

Use CPL Lender

Goldbar Lending 1998 Main Street

Get Jacket

5. The name of insured should now populate with the covered party, depending on which policy type you selected.



Services Gateway - CPLs & Jackets - 23-0008

CPL Jackets Policy Upload

Branch: 1-DO NOT PREPARE PRODUCT

Policy Type: 2021 - Owner's Policy

Policy Exposure Amount: 295000.00

Name Of Insured: Jonathan J. Long and Amira Long, husband and wife

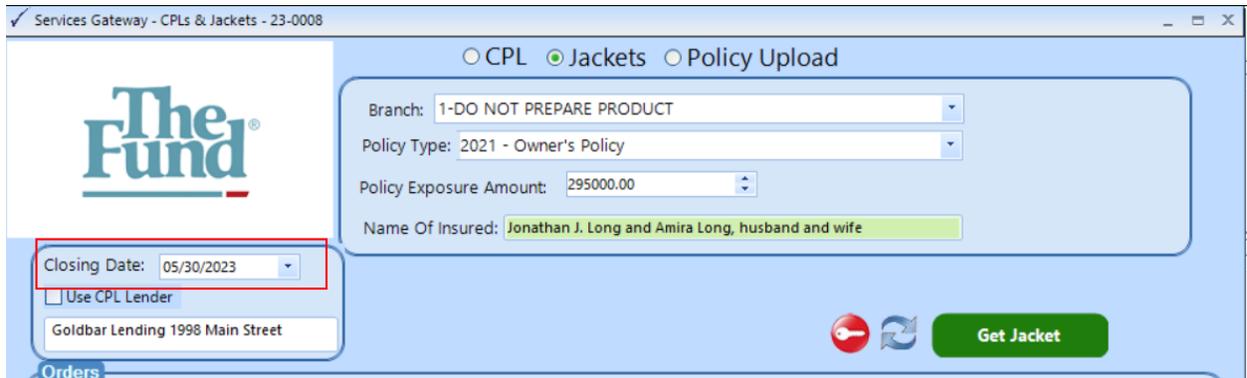
Closing Date: 05/30/2023

Use CPL Lender

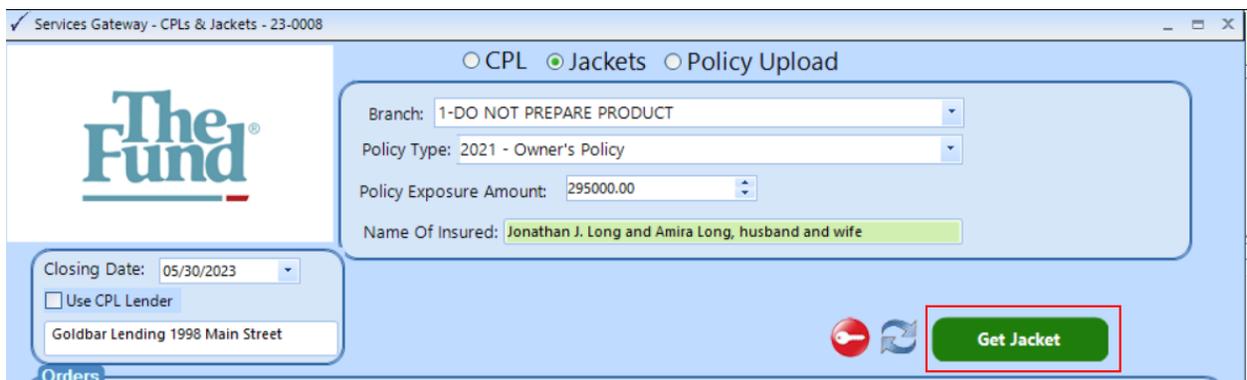
Goldbar Lending 1998 Main Street

Get Jacket

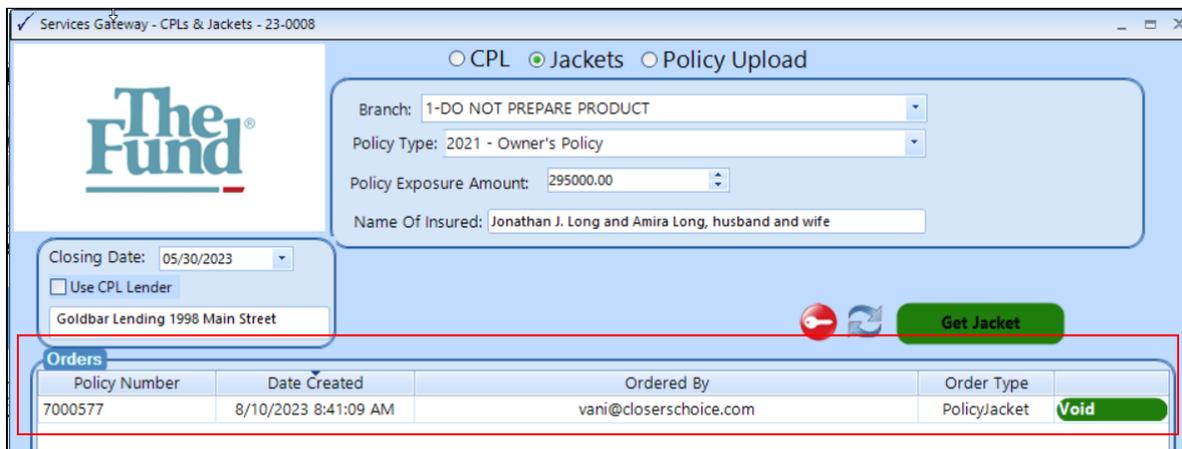
6. The closing date will populate into the closing date field automatically.



7. When you are satisfied with your selections, click the green 'Get Jacket' button.



8. Your policy jacket will now appear in the 'Orders' section of the window. Any documents generated will also be automatically saved in your Saved Documents in your file in Closers' Choice and can be accessed in the viewer or document generator. You can view, print, or email the jackets from there.



Policy Number	Date Created	Ordered By	Order Type	
7000577	8/10/2023 8:41:09 AM	vani@closerschoice.com	Policy/Jacket	Void

- If you have a feature called Docs in Cloud activated on your account, you can view the jacket(s) in the bottom of this same window in the 'Documents' section without leaving the screen. It will open a new window for you, and you can review, email, or print it out. It is still automatically saved to your file in Closers' Choice.

Document Name	Saved Date	Document Type	Size	
Jacket_owner_7000577.pdf	8/10/2023 8:41:08 AM	PolicyJacket	531524	View
CPL -04252023.PDF	4/25/2023 2:26:00 PM	CPL	103144	View

- If you need to void your jacket(s), click on the green void button. You can re-order your jacket(s) as necessary.

Services Gateway - CPLs & Jackets - 23-0008

 CPL
 Jackets
 Policy Upload



Branch: 1-DO NOT PREPARE PRODUCT

Policy Type: 2021 - Owner's Policy

Policy Exposure Amount: 295000.00

Name Of Insured: Jonathan J. Long and Amira Long, husband and wife

Closing Date: 05/30/2023

Use CPL Lender

Goldbar Lending 1998 Main Street




Policy Number	Date Created	Ordered By	Order Type	
7000577	8/10/2023 8:41:09 AM	vani@closerschoice.com	PolicyJacket	Void

