

Accuair / The Fund Integration

When The Fund's user credentials and transaction 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 [Profile](#).

To add or edit underwriter user credentials:

- Select [Your Profile](#).
- Scroll down to the Connected Accounts section.
- In the **Underwriter** tab 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 company
 - Key-in the **User ID** and (User) **Password**
 - Select [SAVE CHANGES](#) at the bottom of the table

The screenshot shows the user profile page for Shannon Staiger. The 'Connected Accounts' section is expanded to show the 'Underwriter' tab. A table with columns for Underwriter, Company, User ID, Password, Agent ID, and Agent Password is displayed. A 'New' button is in the top left of the table. A dropdown menu is open under the 'Underwriter' column, showing 'TF (Old Republic National)' selected. The 'User ID' and 'Password' fields are highlighted with green boxes and labeled 'C'. The 'SAVE CHANGES' button at the bottom of the table is highlighted with a green box and labeled 'D'. A red callout box points to the user's profile picture with the text 'Your Profile'.

- The following [Transaction Dashboard](#) information is required:
 - [Transaction Information:](#) App Type / Purpose, Selling Price/Owners Insurance (if applicable); The Fund (TF) must be selected as the Underwriter

Transaction Information

Sales Price	\$421,365.00	✓	Purpose	Purchase	✓
Trans Type	Standard		UW	TF	✓

- o **Loan Information:** All Loan Details (if applicable)

Loan Information

Loan \$	\$381,457.87	✓	Loan #	1162515010	
Lender	Angela's (Test) Lending Co.	✓	Email		Phone

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

Property Information (Multiple)

Address	800 Plew Avenue Shalimar FL 32579	✓✓✓	Municipality		
County	Okaloosa	✓	Type	Commercial	✓
Parcel	Parcel#1				

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

Party Details ADD SAVE

Entity, Estate or Trust

First/Middle Name: ✓

Last Name: ✓

Status: _____ Proposed Tenancy: _____

Mailing CREATE

Current Mailing address: ✓ CC

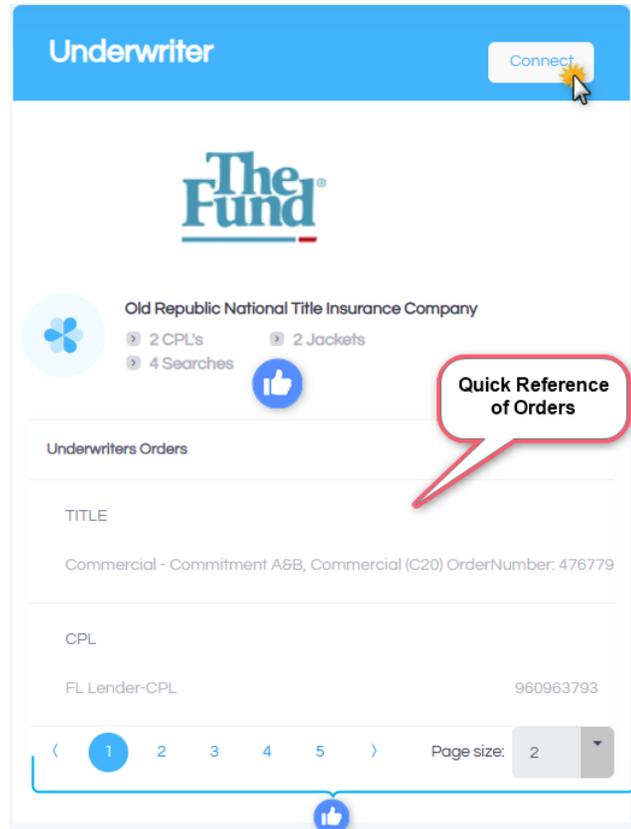
Future Mailing address: CC

Collective Names: ✓ CC SAVE CHANGES

Connect to the Underwriter Integration

The **Underwriter** tile summarizes the products and orders requested for the current transaction.

Access the underwriter integration through the **Transaction Dashboard** by scrolling down to the **Underwriter** tile and selecting the **Connect** button.



Agent Information

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

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

The screenshot shows the 'Agent Information' form. It features a 'The Fund' logo on the left. The 'Requesting Branch' field contains the value '0000'. The 'Additional Branches' field is a dropdown menu currently showing '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 transaction as often as needed.

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

Attachments (optional): Items in the transaction’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:

SAMPLE SEARCH DOCS (DEMO ONLY) X

PRIOR POLICY - 1 SAMPLE ST (DEMO ONLY)

DEMO ONLY - TAX SEARCH

DEMO ONLY - NEW ORDER

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

- Notes submitted with orders will be recorded in **Transaction Notes**

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

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

- Order details will be displayed in the grid.
- Manage/track orders in **View Existing Products** found in the **Products** section of the Accuair menu.

Available Services

Title Search CPL Jacket Activity/History

Search Type: *
 ... Please select a Search type

Need by Date: 2/22/2025

Attachments:

Notes:

Submit Search Request

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 A5B, Commercial (C20)	476779Q

Process Completed Title Search Orders

1. In the Accuair menu, click **Commitment** and select **XML Reports**.
2. The **Ready Commitments** tab displays all title reports available to import. Search and/or select the **Title** to Import the desired report.

Documents Products Commitment Title Vested Requirements Exceptions Endorsements Prior Policy Info Time Tracking XML Reports

READY COMMITMENTS MANUAL XML IMPORT ACCUAIR TRANSACTION IMPORT

Show New Show All

Received Title Reports

Enter text to search...

<input type="checkbox"/>	Title	Sender	Received On	Processed
<input type="checkbox"/>	TESTFILEFEBO	TheFund	02/11/2025 04:33 AM	
<input type="checkbox"/>	CWA_FEB05_39B	TheFund	02/05/2025 04:41 PM	
<input type="checkbox"/>	CWA_FEB05_39B	TheFund	02/05/2025 04:38 PM	
<input type="checkbox"/>	CWA_FEB05_39B	TheFund	02/05/2025 04:34 PM	

3. Use the slider controls & 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 transaction.
- **Import & Append** adds the details to existing information in the corresponding section of the transaction.
- **Exclude** prevents report details from being included in the corresponding section of the transaction.

- Import & Replace
- Import & Append
- Exclude

4. Select **IMPORT** at the bottom of the page.

Note: Supporting documents from the vendor will automatically be loaded to your file upon import.



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 transaction will automatically void the previous version.

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

Letter Type: * Please select Letter Type

Create Closing Protection Letter

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 New (active) 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 Original CPL - automatically voided with new request	2025-1000084	960963793	
2762	1/16/2025 15:14:20	Commercial - Commitment A8B, Commercial (C20) OrderNumber: 476779Q	476779Q	11178	

Jackets

Effective Date: Defaults to transaction'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** section.
- Policy Jacket numbers are saved to the **Policy Recitals** section of the **Policy** section.

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

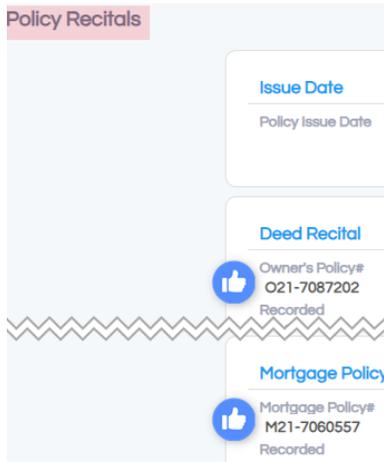
Effective Date: 02/03/2025 12:00 AM Policy Type: * ... Please select a form

Create Policy Jacket

Title Vested

Commitment Dates

Cover/Board Date	Commitment Issued	Revision#	Commitment Jacket#	Closing Protection#
			C21-7052343	



Voiding Jackets

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

Activity/History

The following details are recorded for all products requested for the transaction 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	Q21-7087202	
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	