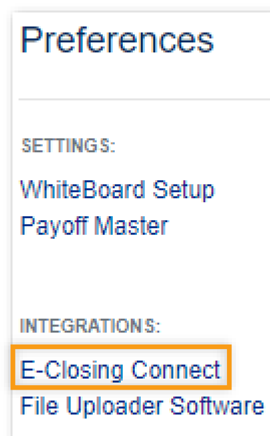
ClosingVue
The Fund Integration Guide

This guide will walk you through all aspects of The Fund integration, including setup, Generating CPLs and Policy Jackets, ordering and importing Fund Product Orders (BPO), Policy Uploads, and Remittance and Paying Invoices.

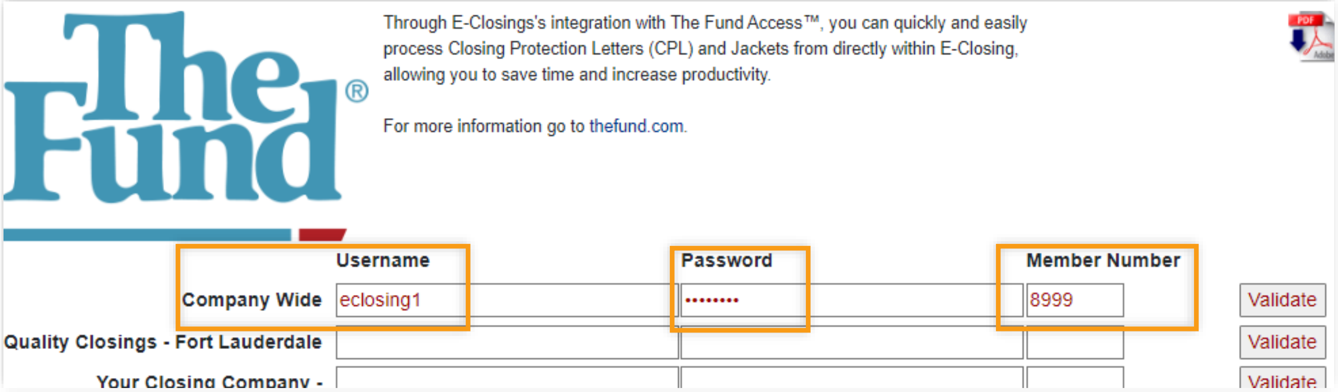
Guide Contents (click to jump ahead)

Setting up the Integration

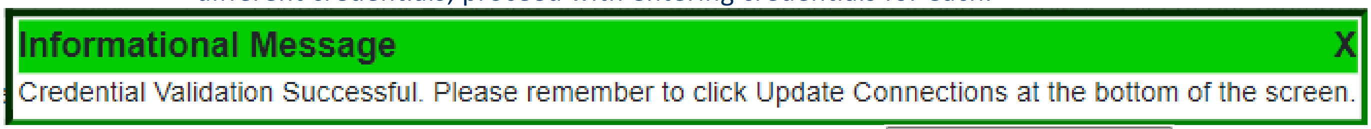
Start by heading to **Back Office** in the top menu.

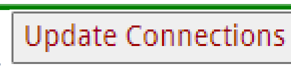


1. Under **Preferences,** select **E-Closing Connect**.
    - If you don't see E-Closing Connect as an option, you may need to change your user access under Users in Back Office.
2. Click **The Fund Logo**.
3. Enter your Fund credentials and Member Number into the Company Wide fields or if multiple company names are listed and each uses different credentials, see step four.
    - This is a single-user sign-on integration so you will use the same username and password you use when logging directly into The Fund.



4. Click **Validate.**
   - If your ClosingVue account is also set up with additional settlement agencies and each use different credentials, proceed with entering credentials for each.



5. Scroll to the bottom of the page and click **Update Connections**. 

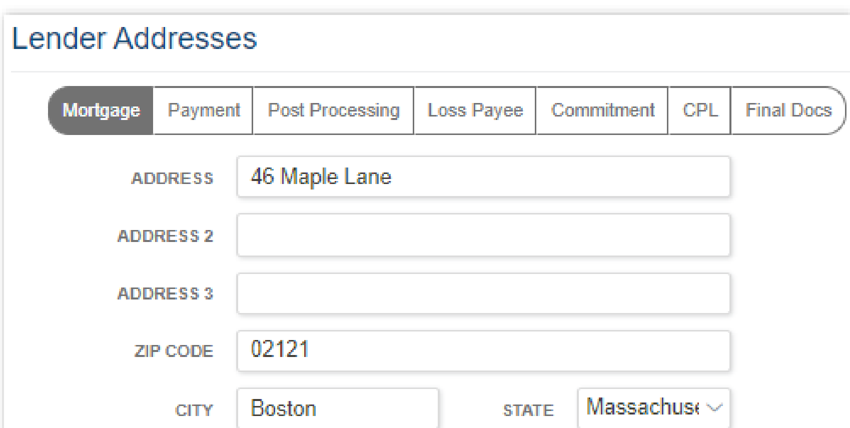
Each ClosingVue User on your account needs to repeat this process IF they use the Fund Integration.

Generating a CPL

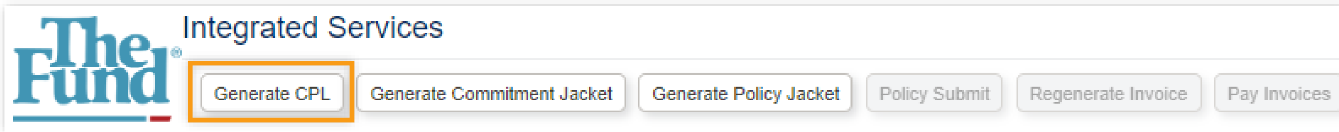
With the Fund integration, you can Generate and Update a CPL.

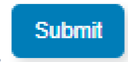
From within the file, expand the menu, and under Maintain File click on **Title Policy Information**.

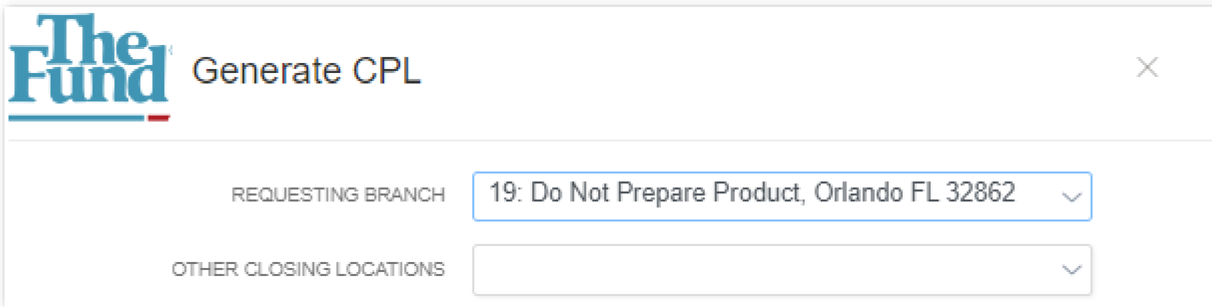
1. Make sure you've selected **Old Republic National Title Insurance/ATFS (The Fund)** from the **Underwriter** dropdown menu. To learn how to calculate a premium, check out the Title Policy video located in the Help Center.
   a. Make sure you add a **Lender** and verify that a CPL address is added in **Lender Addresses** on the Financial Information page.



2. Click **Generate CPL**.



3. Make selections from the dropdown menus in the next window, and click **Submit**. 



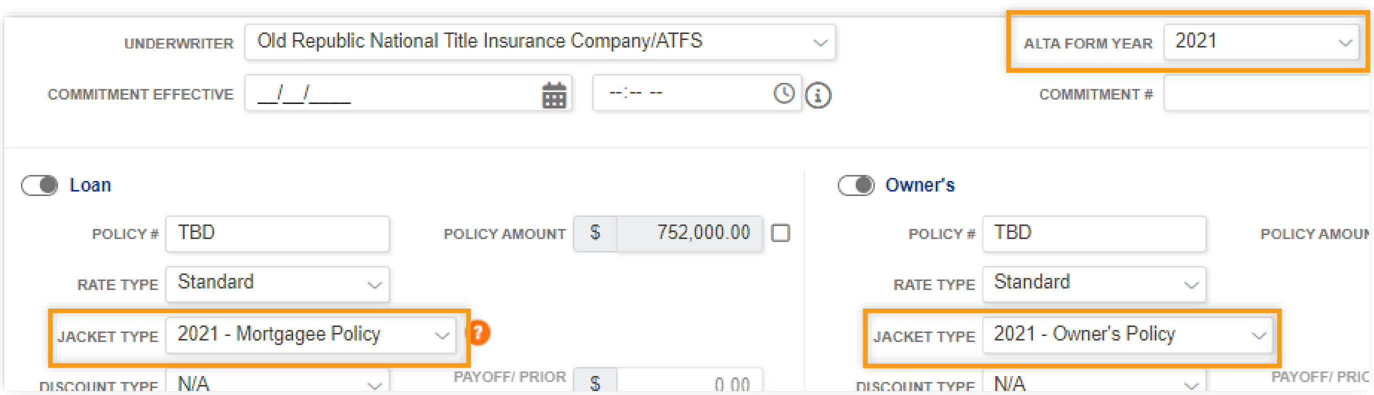
4. The CPL will pop up in another browser tab in PDF format.
5. A copy is automatically saved in Document Management to print at your convenience.

Generating Policy Jackets

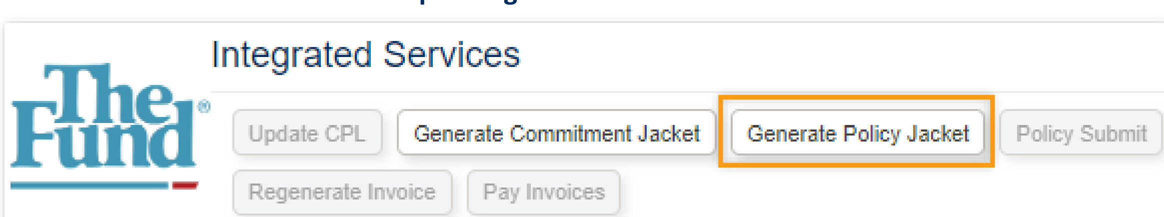
With **The Fund** integration, you can Generate the Policy Jacket(s).

From within the file, expand the menu ☰, and under Maintain File click on **Title Policy Information**.

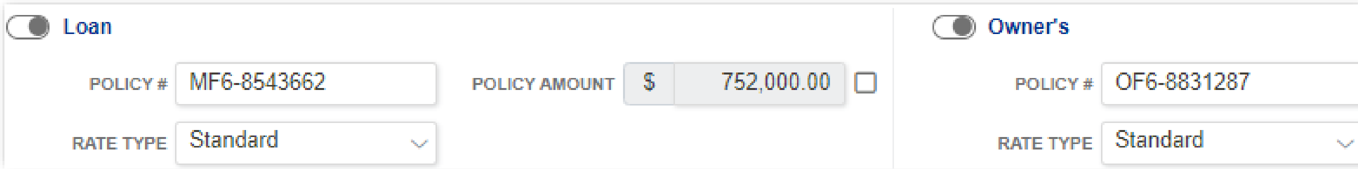
1. Select **Jacket Type** dropdown menus.
    a. Jacket Type Year must match ALTA Form Year.



2. Click **Generate Jacket** and **Requesting Branch** in the next window.



3. Separate tab(s) will appear with the policy jacket(s).
4. The **Policy Number** will automatically be populated in the **Policy Number fields**.



5. The **Policy Jacket(s)** will be automatically saved in Document Management.

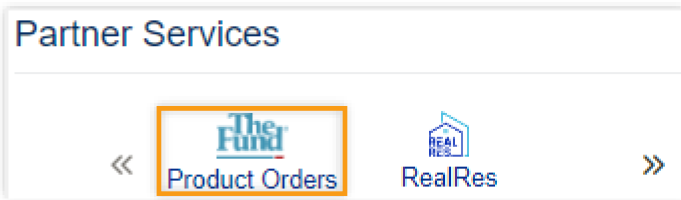
Fund Product Orders

The Fund integration offers the ability to place product orders, edit the order, import the search results, check the status of orders, and order an update.

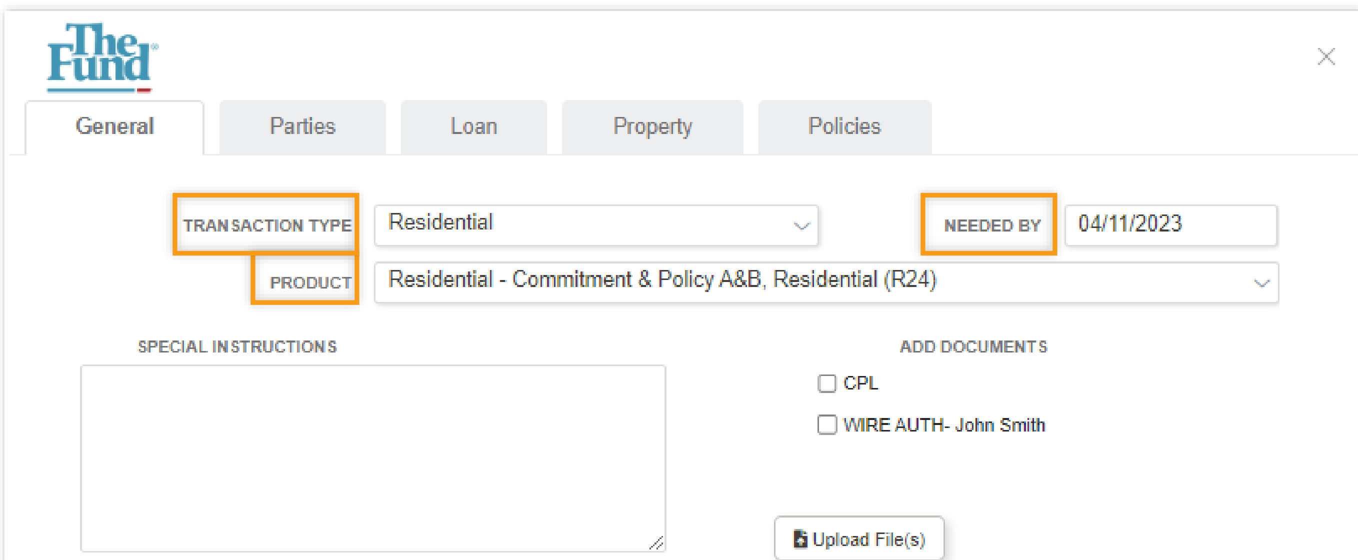
Placing an Order

From within the file, expand the menu ☰, and under Maintain File click on **Property Information**.

1. On the Property Information page, click on **The Fund Product Orders button**.



2. In the General tab, select the **Transaction Type**, **Product**, and **Needed By** (date when you need the search back).



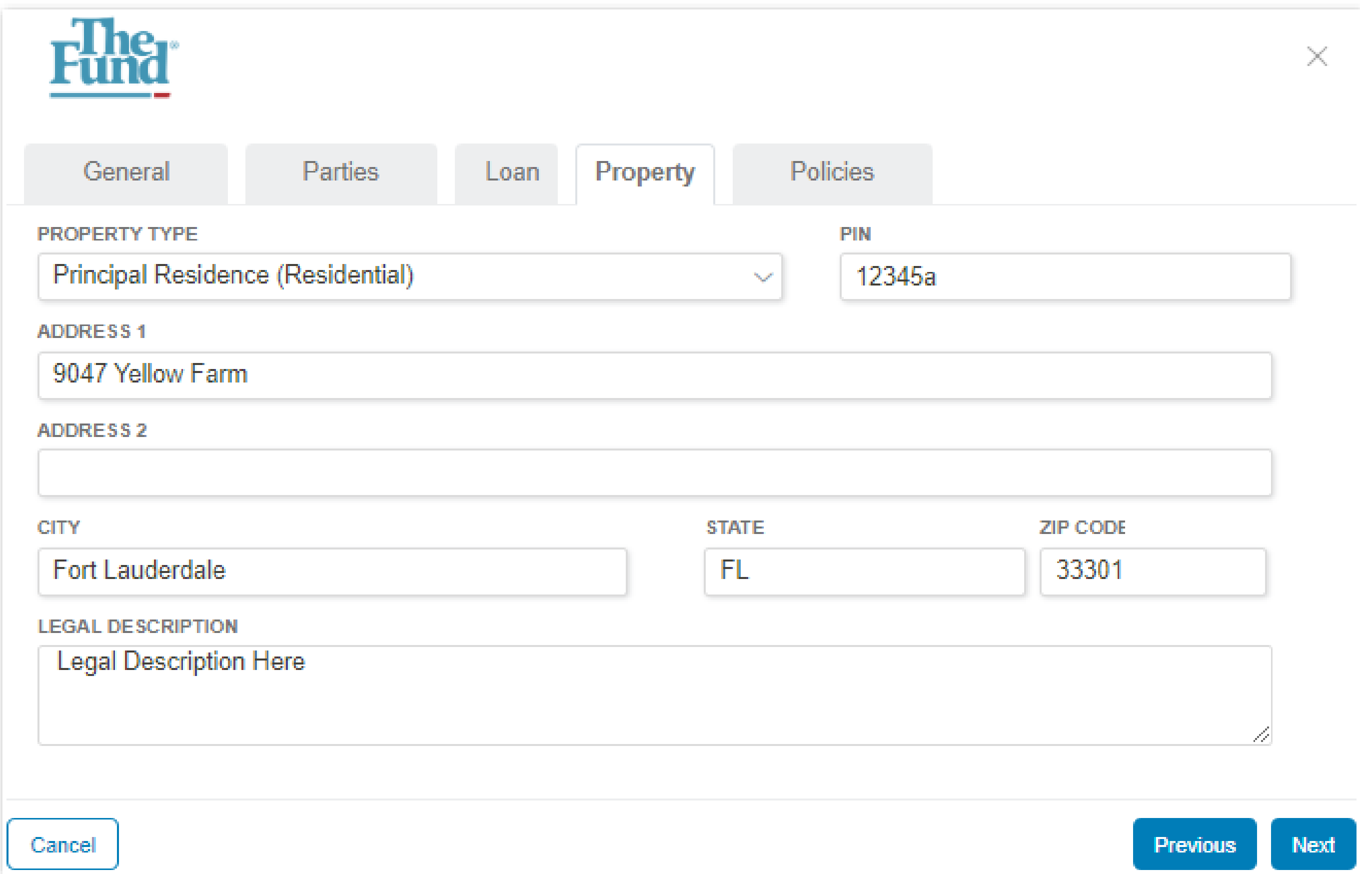
   - Note: Information from the file will not pull to the other tabs until you have filled in the three options from step two.
3. Additional text can be added to the **Special Instructions** field.
4. Documents can also be added to your order in two ways:
   - Documents already saved to the file (Scanned/Saved documents) will show under **Add Documents**. Use the checkbox ☐ to add selections to the order.

- To add a document that is not already saved to the file, click on the Upload File(s) **Upload Files** button and choose a document from your computer files. These documents will be automatically added to the Scanned/Saved Documents in Document Management.

5. Click **Next** Next – this will bring you to the other tabs.
6. The Buyer and Seller names, Property Information, Purchase Price, Loan Amount, Lender, and Legal

Description populate from your file to the details tabs. Use the **Next** button Next to review each tab. Fill out all necessary information in the fields.

- Only the **Primary Property** gets sent via the integration when placing an order. If this is a multiple property file, add any additional parcels as a Note and then follow up with The Fund to confirm they acknowledge those additional properties.
- You can edit the information on The Fund Integration Order tabs, but this will not revise any data in your ClosingVue file fields. It is best to fill out all pages under the Maintain File menu system first. Information first entered in Maintain File automatically populates to the corresponding fields on the order form.



7. Click **Submit Order** Submit when you're ready to send the order to The Fund. Once your order is placed, you will receive a message that your order was submitted successfully.

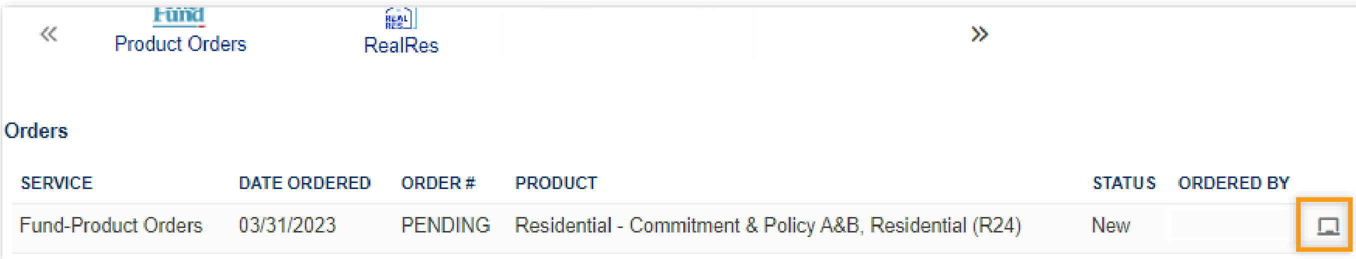
The product order has been submitted successfully. ✖

8. You'll be notified by email once your order is ready. Follow the steps below to Import the Results (pages 6-9).

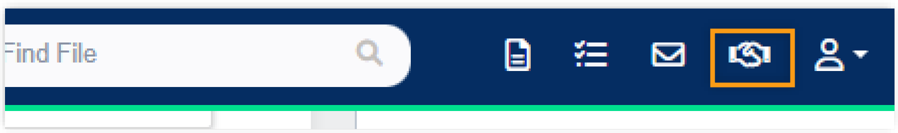
Import the Order

You should receive an email from the Fund after completion, which may contain a link to the **Industry Partners** page or you can navigate there from ClosingVue.
There are two ways to navigate to **Industry Partners** in ClosingVue:

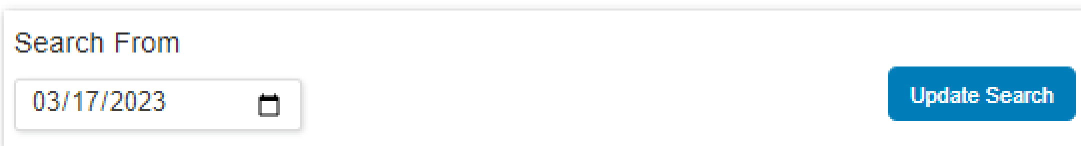
- On the Property Information page click on the **Whiteboard button** under **Orders**.



- Anywhere in ClosingVue, click on the **Industry Partners button** and choose listed under **Product Order Status** The Fund.

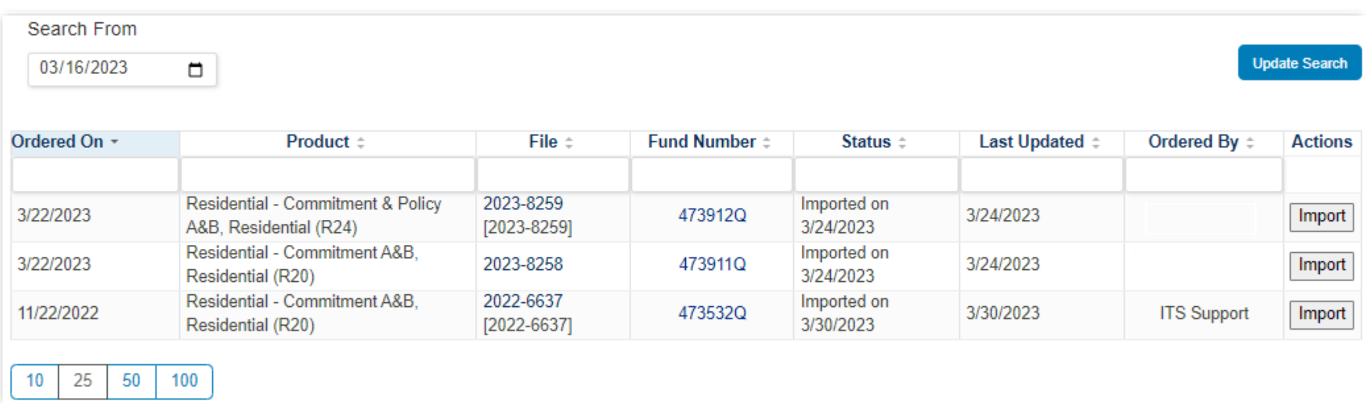


The default search parameter within the Fund Product Orders Whiteboard shows orders where the "last updated" date is within the last two weeks. You can manually change the date as far back as needed. It is not based on the ordered date.



On the right is the column **Actions**, which indicates when a new item is available. Clicking on **New** will allow you to import the Fund Product into your closing file.

The **Fund Number** is a hyperlink to the Branch Product Order Detail Report – which shows what was submitted in the initial order to The Fund.



Search From
03/16/2023
Update Search

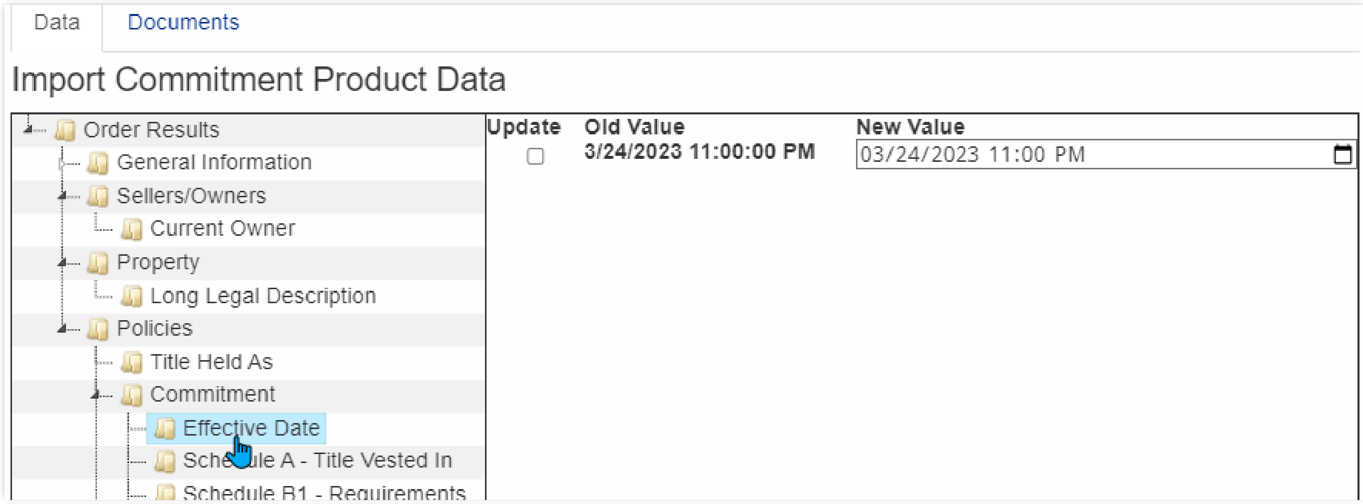
Ordered On	Product	File	Fund Number	Status	Last Updated	Ordered By	Actions
3/22/2023	Residential - Commitment & Policy A&B, Residential (R24)	2023-8259 [2023-8259]	473912Q	Imported on 3/24/2023	3/24/2023		Import
3/22/2023	Residential - Commitment A&B, Residential (R20)	2023-8258	473911Q	Imported on 3/24/2023	3/24/2023		Import
11/22/2022	Residential - Commitment A&B, Residential (R20)	2022-6637 [2022-6637]	473532Q	Imported on 3/30/2023	3/30/2023	ITS Support	Import

10 25 50 100

Select the item to import by clicking the **New button**; the **Import button** allows you to review and import again.

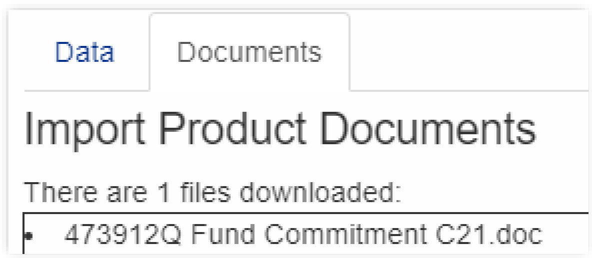
The **Import Window** will show all fields within the closing file that will be updated when the import is completed.

Each field can be reviewed by clicking on the field name (such as Current Owner, to reveal the owners Old Value and New Value). You can then keep the old value or approve the imported value. To accept the **New Value** use the **Update** checkbox ☐ .



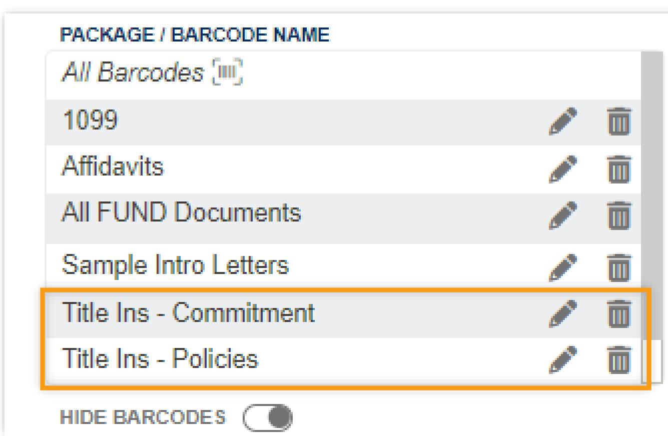
Clicking the **Next button** 

advances you to the next tab to view the documents that will be downloaded into your closing file. Select **Import Data** located at the bottom of the window, to complete the request and import the selected data and documents.



The order results and files are then successfully imported. The **search results** are directly imported into the Text Description/Commitment and Policy page and are displayed as bolded Titles in the Text Description box.

Manual edits can be made on that page, which carries to the Commitment in the **Title Ins – Commitment and Policy packages** in Document Management.



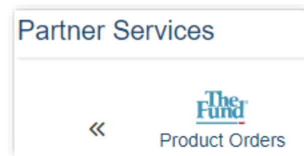
The field for the **Commitment Effective Date** is also filled in on the Title Policy page.

- Note: Imports of data can be repeated by clicking the **Import button** on the Product Orders Whiteboard.

Imported documents will be stored in the **Products folder** in Scanned/Saved Documents.

Check out the Help Center for the Text Description, Title Production, and Document Management videos/guides.

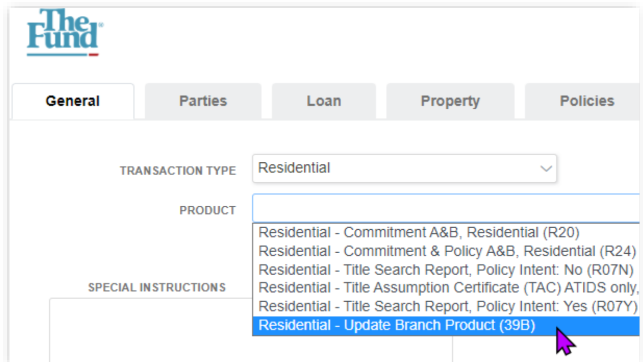
Order Update



To order an update of a BPO, navigate to the **Property Information** page and in the **Partner Services** section, click on **The Fund** - **Product Orders**.

An Update Order can only be made once the initial order has been returned and import has been completed for that file.

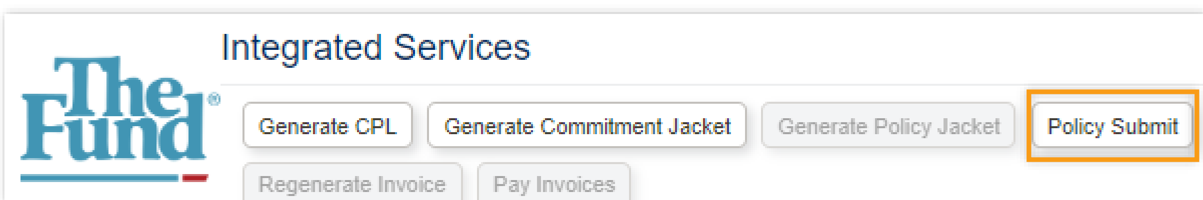
In the General tab, choose **Transaction Type**, **Product** - **Update Branch Product**, and **Previous Order**.
Add Documents and Special Instructions and review and revise the information in the information tabs. Click **Submit Order** when complete.



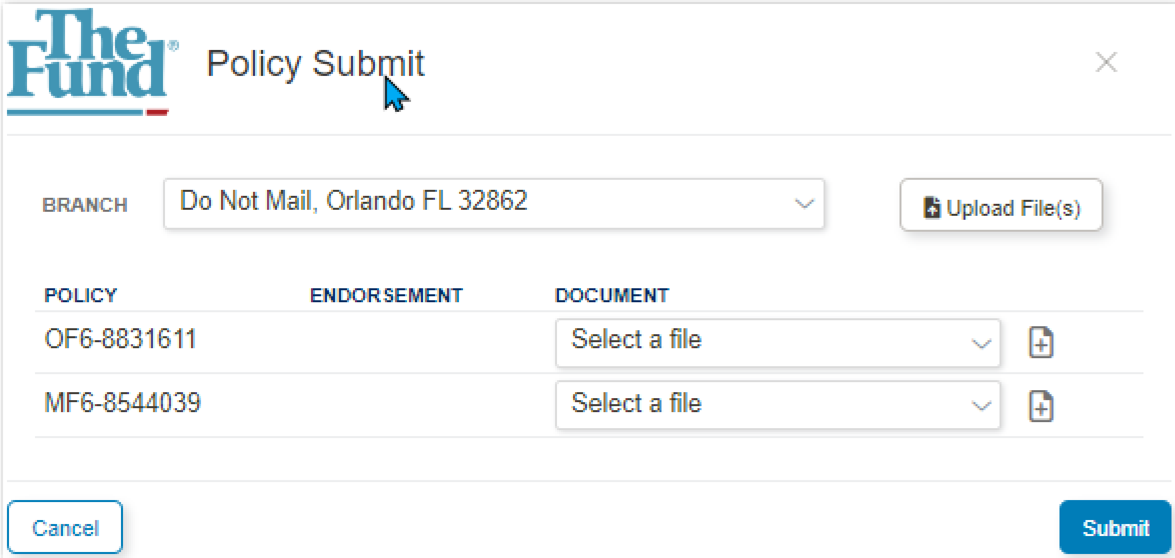
Upload Policy

To upload the policy to **The Fund**, navigate to Maintain File and select **Title Policy Information**. Note, the **Policy Submit** button won't be clickable until you've generated the Policy Jacket(s), and you will NOT be able to use the **Pay Invoices** button until you have uploaded the Policy.

1. Click the **Policy Submit** button.

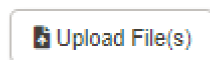


2. The policies will be listed; click **Select a File** to select the policy document file to upload.



There are multiple ways to select the policy to upload:

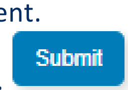
a. Documents saved to the file will show in the dropdown menu in the Document column; select the policy.

b. To add a document that is not saved to the file click on the 

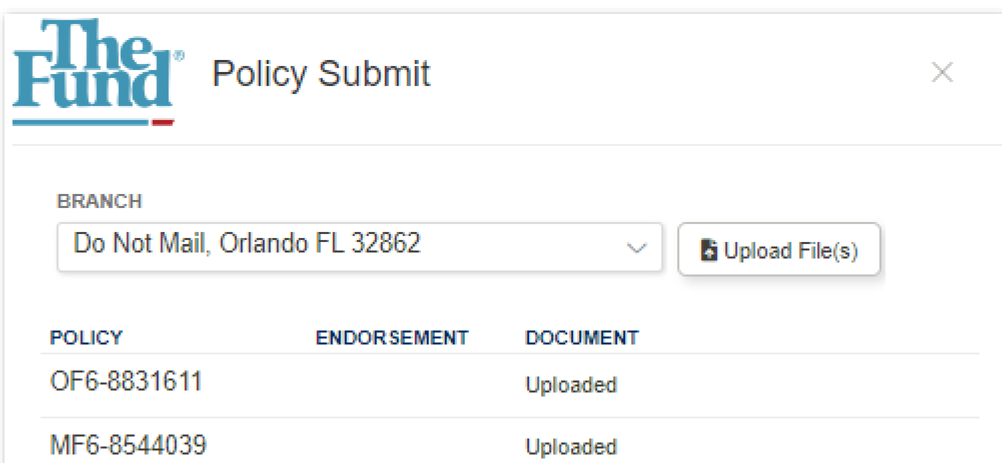
Upload Files button and choose from your computer files. The file is uploaded to your account in the Scanned/Saved documents. Choose it from the **Document** dropdown menu.

c. You can generate the document from ClosingVue by clicking the **Generate Document** button. This will automatically add the Policy template as your selection and save a copy in Document Management – Scanned/Saved Documents.

  - Note: It is recommended that you review the policies in Document Management before submitting. Check out the Document Management guide in the Help Center to learn how to generate a document.

3. Once document selections are made, click **Submit**. 

4. Once the upload is completed, an Invoice generates in another tab of your browser and a note appears on the Policy Submit window.

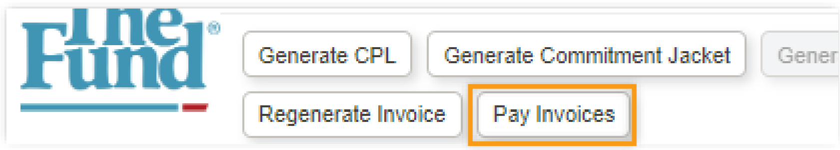


When all documents have been uploaded to the FUND, an Invoice will generate on the screen. If necessary, you can use the 'Regenerate Invoice' if the invoice needs to be reprinted.

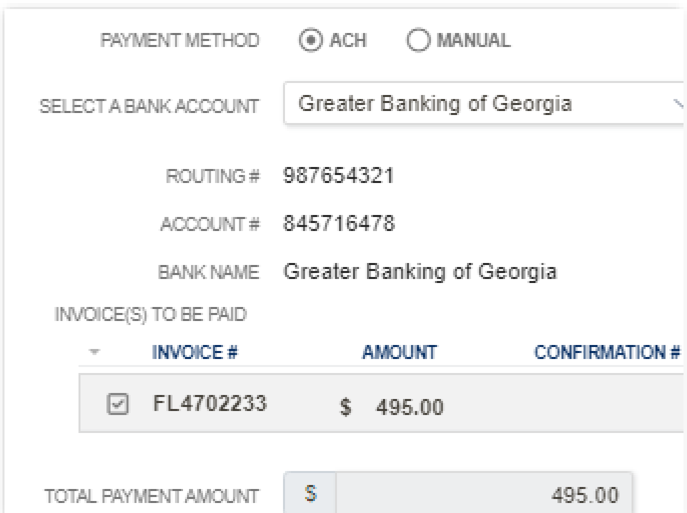
Pay Invoices

After policy submission, an invoice is generated and attached to the ClosingVue file. You can pay your invoice(s) in two areas:

The first way you can access your invoice(s) is directly within the file on the Title Policy Information page where the Title Policy was generated.



Click on the **Pay Invoices button**, and a new window will appear.

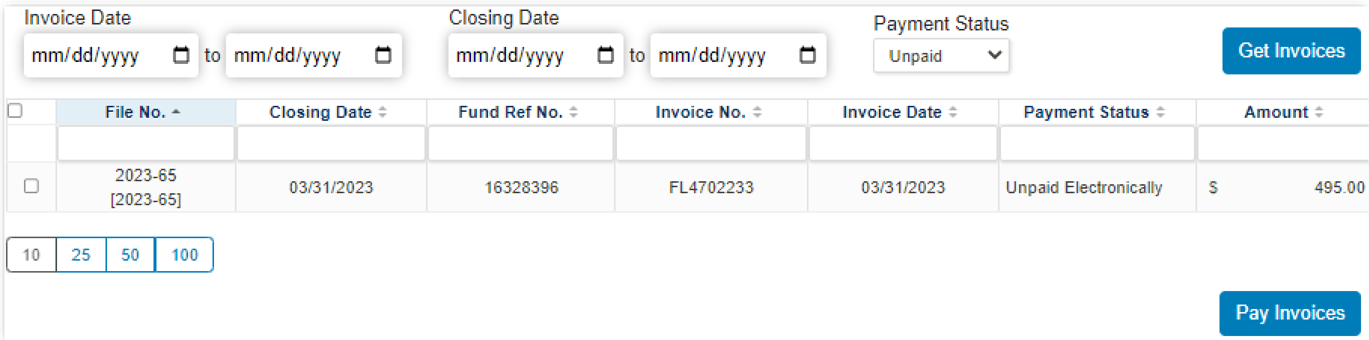


Use the checkbox ☑ to select the invoice you're paying and click **Submit**. 

A notice box will appear on the screen, letting you know the submission of the Invoice Payment has been completed.

The second location for invoice payment can be accessed anywhere in ClosingVue; click on the **Industry Partners button**. On the Partner page, click **Invoice Payment** in **The Fund** section.

> This brings you to the **Policy Payment Whiteboard**, where you can select as many of the policy invoices you wish to pay, sort through your invoices, and show the status of any payment.
>
> Click on the invoice you would like to pay and click **Pay Invoices** at the bottom.



A Pay Invoices box will appear. Select the appropriate Bank Account and click "Submit Payment" at the bottom of the screen.

A notice box will appear on the page, letting you know the submission of the Invoice Payment has been completed.

Frequently Asked Questions

The integration isn't working for me. The Title Policy page buttons are grey, and I can't order products. Did I set up the integration correctly?
The integration is set up in Back Office > E-Closing Connect (see page 1 instructions). You're entering the same credentials that you use to log into thefund.com (not your ClosingVue/E-Closing credentials). After trying again, and retyping without typos, if you can't **Validate**, make sure you can log into the Fund with the same credentials. If they aren't working for either program, it is recommended you reach out to Fund Support: 1-800-421-9378 / support@thefund.com.

Why can't I generate a CPL? I'm receiving this notice A lender must be selected and have a valid CPL address. *but I already added a Lender to this file.*
This is an easy fix! On the Financial Information page, scroll to the bottom of the page. Notice that there is a tab for different lender contacts/purposes. The **Lender CPL Address** must be added to generate a CPL.

You can type in the address here or the Contacts page. Check out the Contacts video in the Help Center for more information.

I'm in the Title Search Order Window, and it's not pulling file info to any tabs, like the Parties and Loan tabs.
To pull information to those tabs, you need to first make selections in three required fields on the General tab: **Transaction Type**, **Product**, and **Needed By**. Then click on the next tab or Next button, and information will show in the following tabs.

I had to order products directly on the Fund website for this file. Can I import results for an order placed outside ClosingVue?
You sure can! Reach out to the Fund and ask them to send you the results in XML or PXT format for ClosingVue. Then you will need a file in ClosingVue to import results into, so the first step would be to create a new file if you haven't already. Once you have the XML/PXT file, go to Maintain File and click **Upload Search Results**. Choose the file and Upload it. The Results will now be loaded for you in Text Descriptions.

I've made changes to fields on the Text Description page. When I generate the Commitment, it isn't reflecting any of those changes.

The Word copy in the Scanned/Saved Documents section imported over through the integration will not reflect changes made to the Text Description page or other file fields in ClosingVue after the order is placed and imported. Instead, generate the **Commitment in the Title Ins – Document Package**. It will show updated file data.