



# Closers' Choice<sup>®</sup> Integrations

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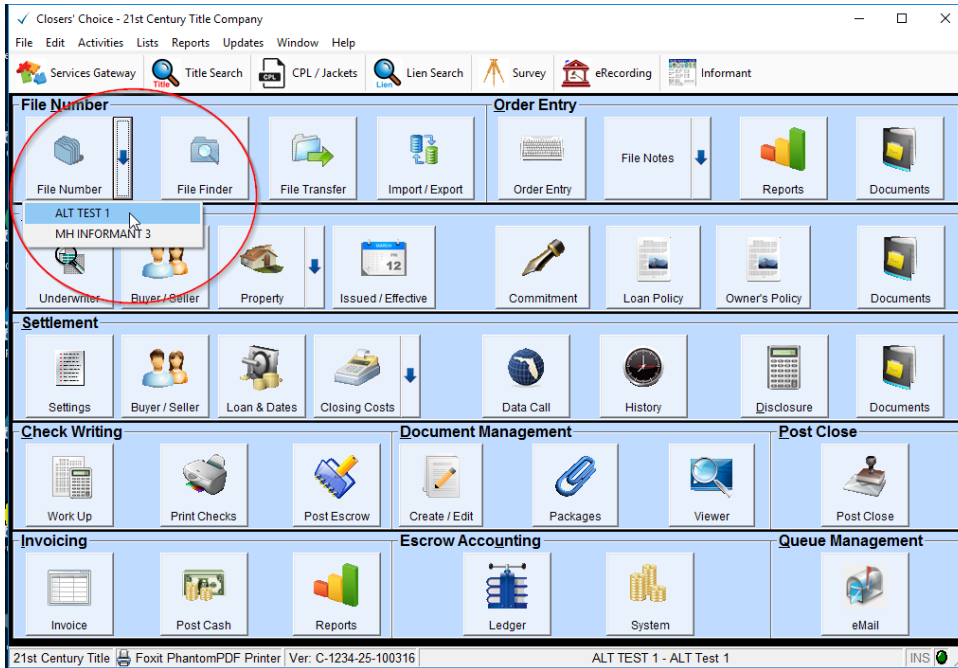
## User Guide

Provided by

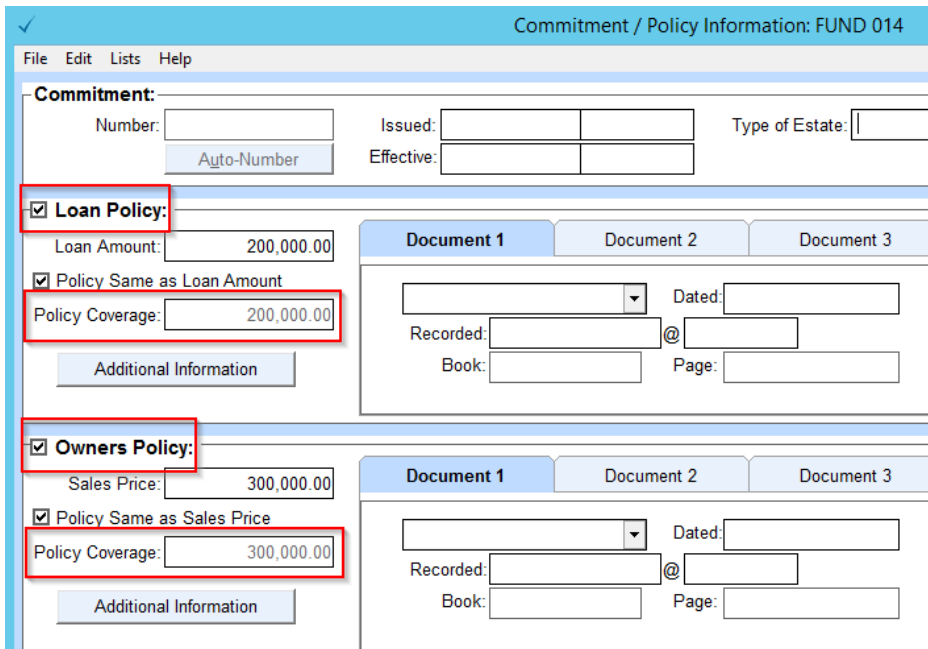
*Closers' Choice*<sup>®</sup>

## THE FUND TITLE SEARCH INSTRUCTIONS

1. From the Main Screen of Closers' Choice, open the File you wish to use as you normally would or create a file and input the information you have available. Make sure all parties have their contact information filled out (first and last name, street address, zip code, phone number, etc.)



2. Also make sure to have your policy information filled out appropriately in the Issued/Effective screen of Closers' Choice, namely the Policy check box and the Policy Coverage amounts.



Commitment / Policy Information: FUND 014

File Edit Lists Help

**Commitment:**  
Number:  Issued:  Type of Estate:   
 Effective:

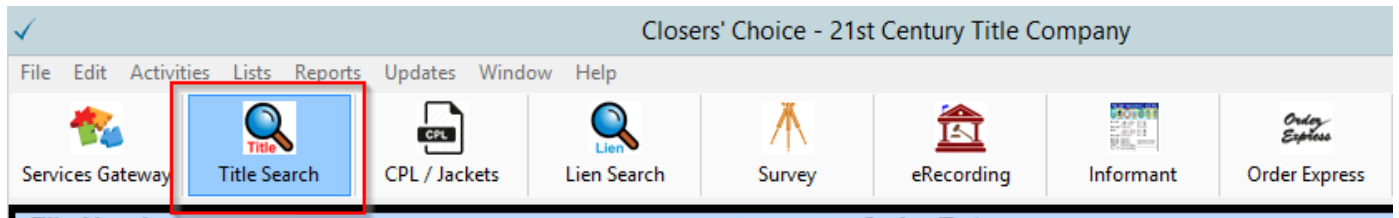
**Loan Policy:**  
Loan Amount:   
 Policy Same as Loan Amount  
Policy Coverage:

**Document 1** Document 2 Document 3  
Dated:   
Recorded:  @   
Book:  Page:

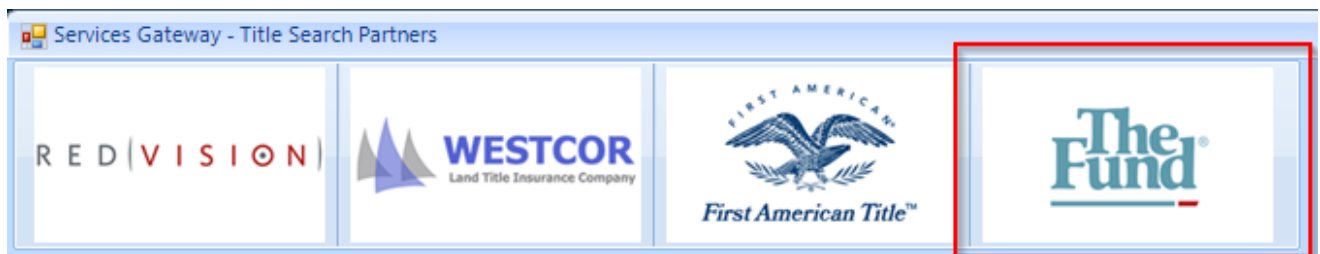
**Owners Policy:**  
Sales Price:   
 Policy Same as Sales Price  
Policy Coverage:

**Document 1** Document 2 Document 3  
Dated:   
Recorded:  @   
Book:  Page:

3. Select the "Title Search" Button on the Closers' Link Services Gateway toolbar.



4. A new window will appear with the Title Search companies available to choose from. Select The Fund.



5. A pop-up screen will appear if this is your first time using The Fund through the Services Gateway. Enter the credentials requested by The Fund. These credentials are provided to you by The Fund. If you do not have credentials, contact The Fund. You should not need to enter the credentials after this initial time. Please see steps 6 and 7 below if you are unsure of what your Member ID is.

Credentials

Please set your TheFund Credentials

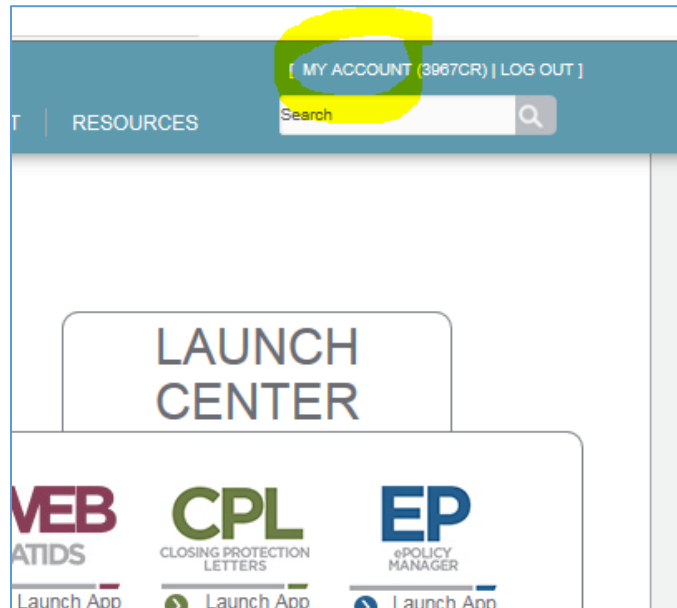
User Name:

Password:

Member ID:

Save

6. If you are unsure of your Member ID, please log on to The Fund's website at [www.thefund.com](http://www.thefund.com). Once there, select "My Account" from the top right hand corner.



7. Below the "Edit User Information" title is your User ID, followed by a number in parentheses. The number in the parentheses is your Member ID. Please enter this, in its entirety, in the Member ID field in Closers' Choice.



8. Once you enter in your credentials, the Title Search order form window will now appear.

The screenshot shows a web application window titled "Services Gateway - Title Search (TheFund) - FUND 202". On the left is the "The Fund" logo. The main form area includes:

- Order Type:** A dropdown menu currently showing "Residential - Commitment & Policy A&B, Re".
- Need By:** A date field set to "04/26/2017".
- Search From:** An empty dropdown menu.
- Remarks / Special Requests:** A text input field with up and down arrow controls.
- Attach Documents:** A section with a checkbox labeled "Affidavit - Death Certificate.RTF" and a document icon.
- Get Title Search:** A button located at the bottom right of the form area.

Below the form is a section titled "Title Search Orders" containing a table with the following columns: Order ID, OrderNumber, Created Date, and Package Status. The table is currently empty.

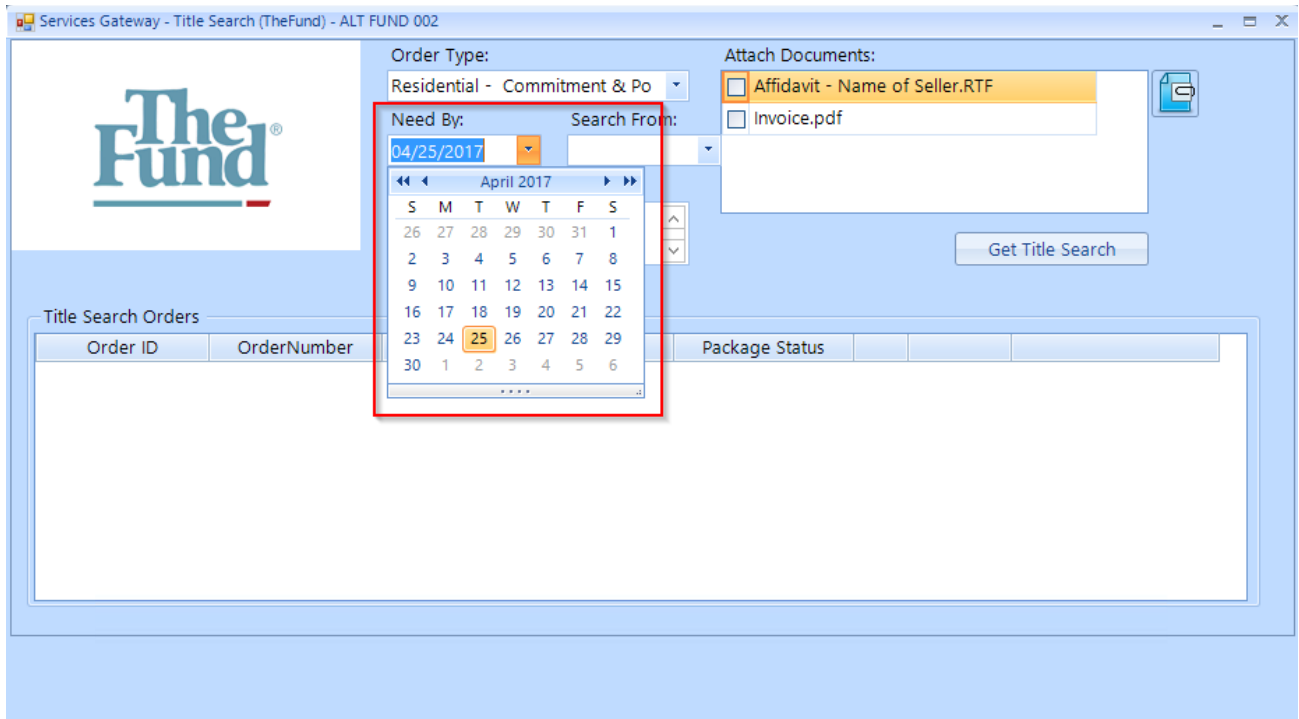
9. Select the drop-down menu for Order Type and make your selection.

This screenshot is similar to the previous one, but the "Order Type" dropdown menu is open, showing a list of options. A red box highlights the dropdown menu. The options listed are:

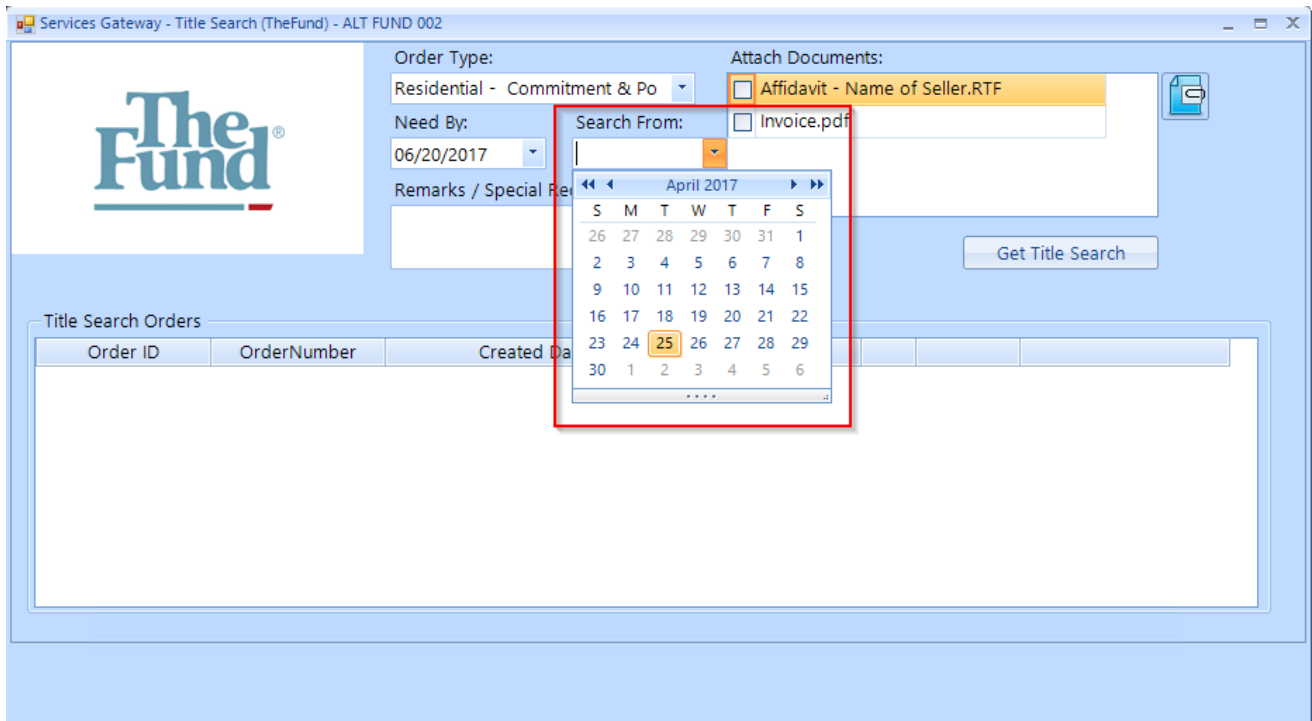
- Residential - Commitment & Policy A&B, Residential (R24)
- Residential - Commitment A&B, Residential (R20)
- Commercial - Commitment & Policy A&B, Commercial (C24)
- Commercial - Commitment A&B, Commercial (C20)

The "Attach Documents" section and "Get Title Search" button remain visible in the background.

- Select the drop-down menu next to the “Need By” field. A calendar will open. Select the date you need your title search documents by. The default date is the date you are entering the order.



- Select the drop-down menu next to the “Search From” field. A calendar will open. Select the date you want the title search to search from.



12. You can add any notes or requests to send to The Fund with your title search order in the “Remarks / Special Requests” field.

Services Gateway - Title Search (TheFund) - ALT FUND 002

**The Fund**

Order Type: Residential - Commitment & Po  
Need By: 06/20/2017 Search From: 01/05/2015

Remarks / Special Requests:  
Rush Order|

Attach Documents:  
 Affidavit - Name of Seller.RTF  
 Invoice.pdf

Get Title Search

Title Search Orders

Order ID	OrderNumber	Created Date	Package Status			
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13. You can attach any documents you wish to send with your Title Search order request. All documents previously saved in your file will show up in the “Attach Documents” field to choose from. If you have not saved the document you wish to save in your file yet, select the paperclipped document icon to browse for the document. Select the check box next to the title of the document to attach it with this title search request.

Services Gateway - Title Search (TheFund) - ALT FUND 002

**The Fund**

Order Type: Residential - Commitment & Po  
Need By: 06/20/2017 Search From: 01/05/2015

Remarks / Special Requests:  
Rush Order|

Attach Documents:  
 Affidavit - Name of Seller.RTF  
 Invoice.pdf

Get Title Search

Title Search Orders

Order ID	OrderNumber	Created Date	Package Status			
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- Verify the information you have ordered is correct. Once you are satisfied with your order information, select the “Get Title Search” button.

Services Gateway - Title Search (TheFund) - ALT FUND 002

**The Fund**

Order Type: Residential - Commitment & Po

Need By: 06/20/2017 Search From: 01/05/2015

Remarks / Special Requests: Rush Order

Attach Documents:
 

- Affidavit - Name of Seller.RTF
- Invoice.pdf

**Get Title Search**

Title Search Orders

Order ID	OrderNumber	Created Date	Package Status

- Once you have placed your order, you should now see you order in the “Title Search Orders” part of the screen. You should see the Order ID upon initially placing the order through the integration. Once our system receives a Fund Order Number from The Fund, the Fund Order Number column will display the Fund’s Order Number. Be sure to reference The Fund Order Number when contacting The Fund with any support questions. Your Package status also appears. At the time of placing your order, the Package Status reads as “In Process.”

Services Gateway - Title Search (TheFund) - FUND 003

**The Fund**

Order Type: Residential - Commitment & Po

Need By: 04/20/2017 Search From: [Empty]

Remarks / Special Requests: [Empty]

Attach Documents: [Empty]

**Get Title Search**

Title Search Orders

Order ID	OrderNumber	Created Date	Package Status		
3720	383098Q	4/17/2017 12:20:40 PM	In Process		Refresh Add Notes/Docs



16. When your order is ready, you should receive an email from The Fund. You'll go back into your file, select Title Search from the Services Gateway toolbar on the main screen of Closers' Choice, and select The Fund button. Your title search request window will appear. You will now see that the Package Status reads as "Complete." Select the "Refresh" button to import the data from The Fund into your Closers' Choice file.

Services Gateway - Title Search (TheFund) - FUND 005

**The Fund**

Order Type: Residential - Commitment & Po  
 Need By: 04/20/2017  
 Search From: [ ]  
 Remarks / Special Requests: [ ]

Attach Documents:  
 383110Q Fund Commitment.docx  
 Invoice.pdf  
 OR Book 26857 4767.pdf

Get Title Search

Order ID	OrderNumber	Created Date	Package Status	Add Notes/Docs
3730	383110Q	4/17/2017 4:11:52 PM	Complete	Refresh

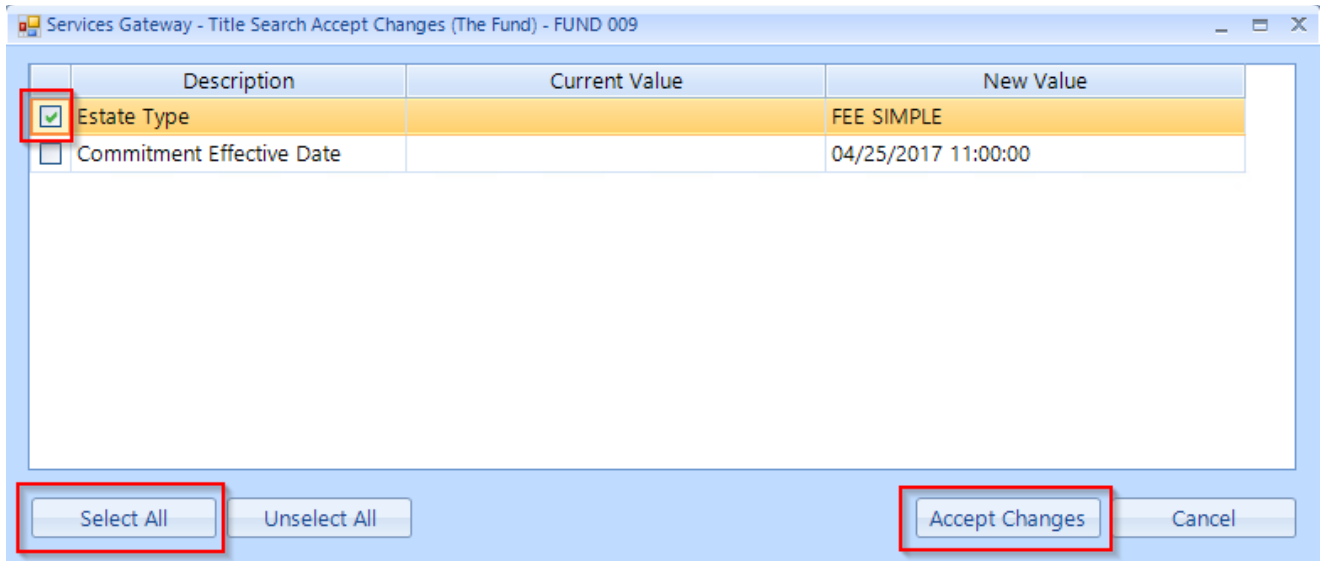
17. An "Accept Changes" screen will appear with three columns: Description, Current Value and New Value. The description column tells you what fields in your order the title search information may affect. The current value is what information you currently have in the file, prior to submitting the information to The Fund. The new value is the information that The Fund found as part of the title search, that you may want to add to your file.

Services Gateway - Title Search Accept Changes (The Fund) - FUND 009

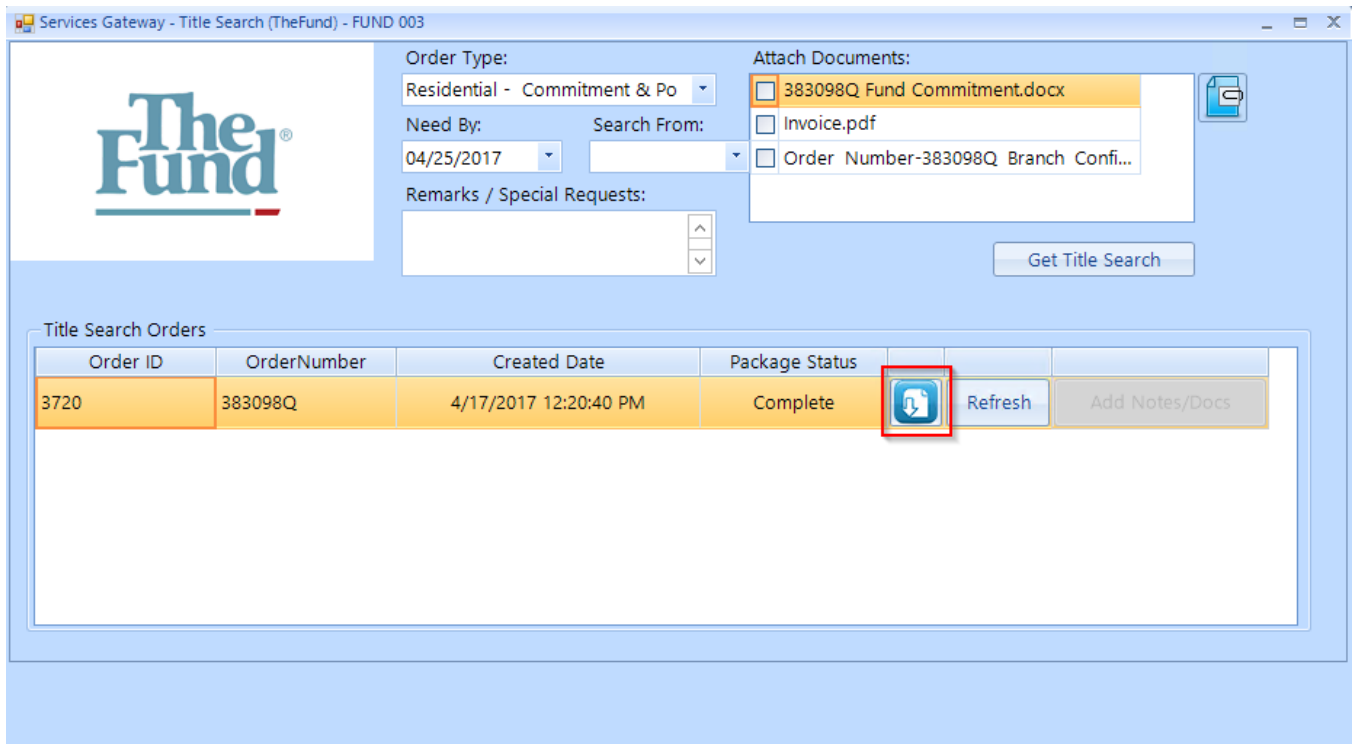
Description	Current Value	New Value
<input type="checkbox"/> Estate Type	[ ]	FEE SIMPLE
<input type="checkbox"/> Commitment Effective Date	[ ]	04/25/2017 11:00:00

Select All Unselect All Accept Changes Cancel

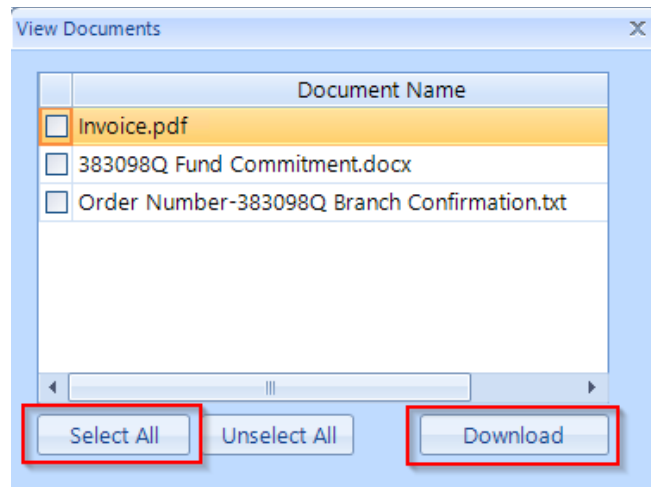
18. You can select all the fields to write over with the new data by selecting the “Select All” button in the bottom left-hand corner of the window, or you can select individual items by selecting the check box next to that item. Select “Accept Changes” to save the changes.



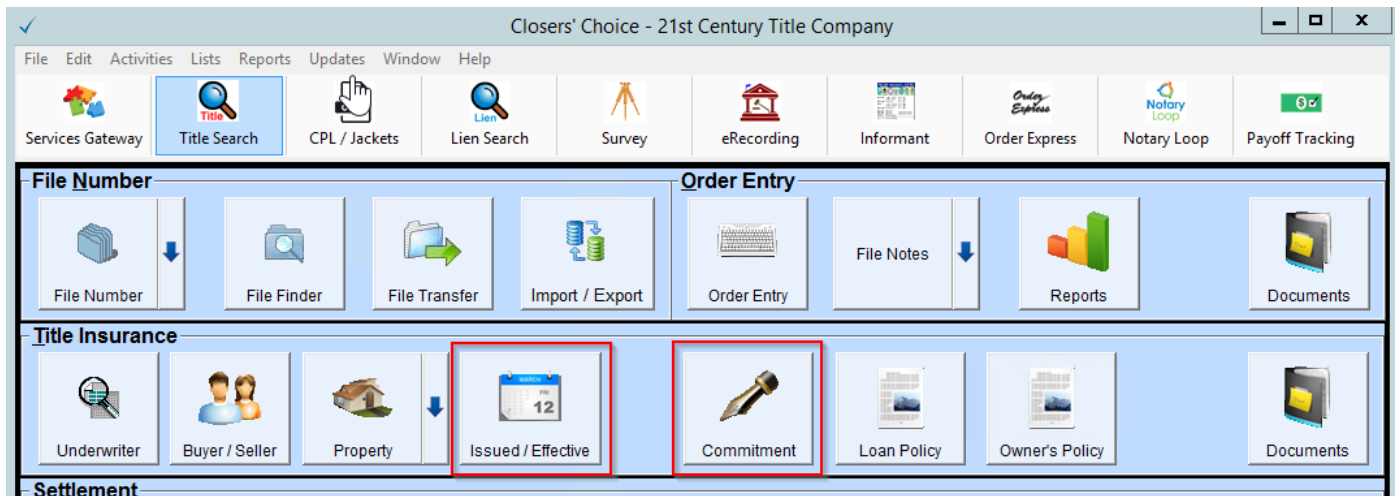
19. Select the blue download icon from the order screen to download your documents returned from The Fund.



20. You can select individual documents by selecting the check box next to that item, or select the “Select All” button at the bottom left-hand corner of the window. Then select “Download.” Your documents will now be saved in your Archived Docs for this folder.

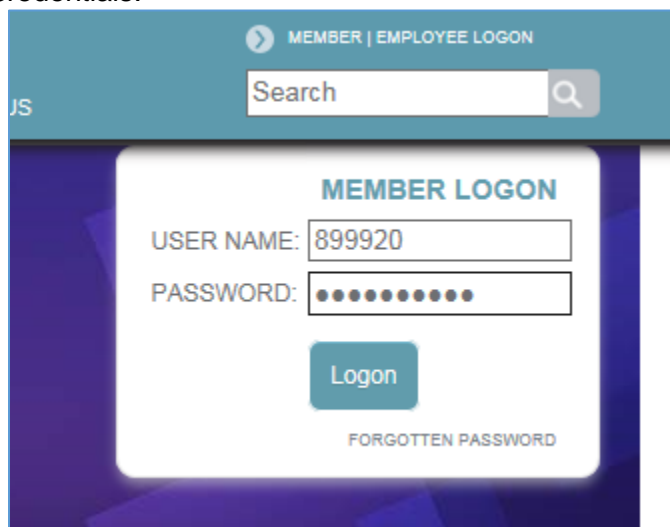


21. Review the data import by checking your Closers' Choice file. Depending on what The Fund sent back and you selected, pay particular attention to the Issued/Effective screen and the screens in the Commitment button in the Title Insurance row of your main page of Closers' Choice.



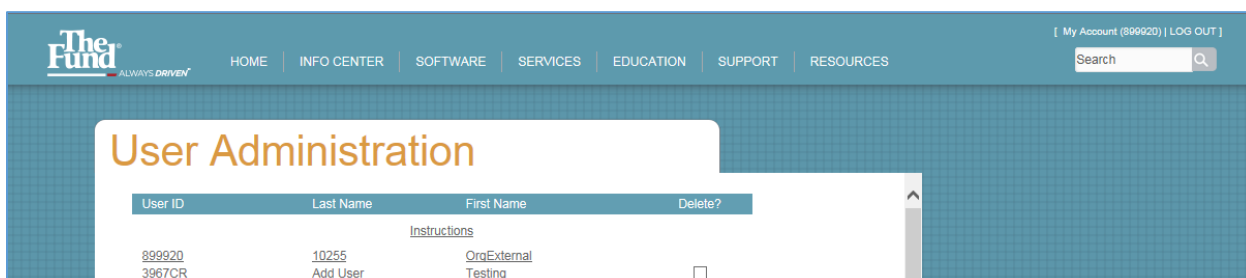
## THE FUND CPLs USER INSTRUCTIONS

1. First, make sure your office administrator sets up access for your users to use the integration. The office administrator needs to log on to the Fund's website using their administrator credentials.



The screenshot shows the 'MEMBER LOGON' page. At the top, there is a navigation bar with 'MEMBER | EMPLOYEE LOGON' and a search bar. Below the navigation bar, the main content area features a white box with the title 'MEMBER LOGON'. Inside this box, there are two input fields: 'USER NAME:' with the value '899920' and 'PASSWORD:' with a masked password of ten dots. Below the password field is a blue 'Logon' button and a link for 'FORGOTTEN PASSWORD'.

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



The screenshot shows the 'User Administration' page. The page has a teal header with the 'The Fund' logo and navigation links: HOME, INFO CENTER, SOFTWARE, SERVICES, EDUCATION, SUPPORT, and RESOURCES. A search bar is also present in the header. The main content area features a white box with the title 'User Administration' and a table of users.

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

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

**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.

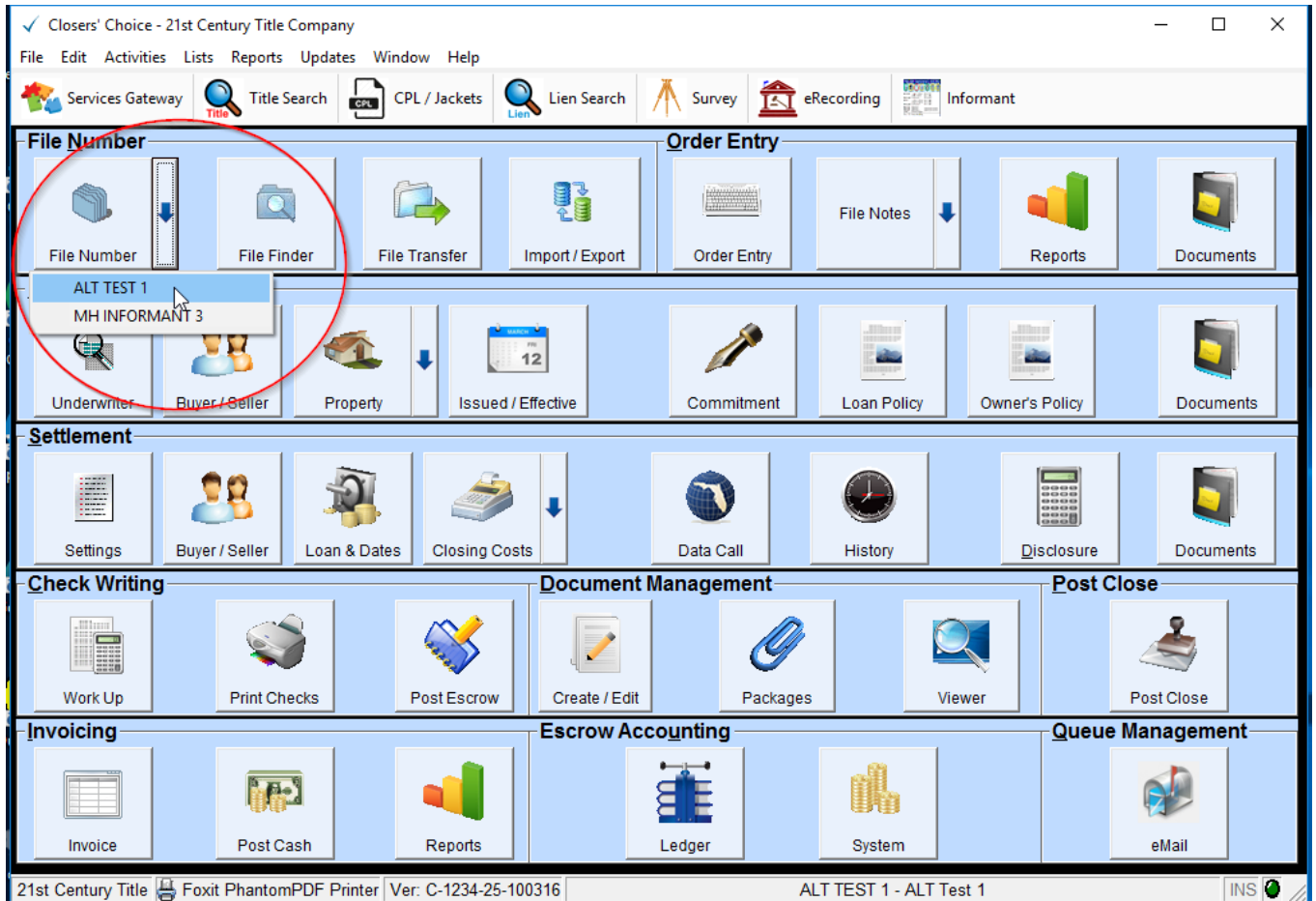
User can access CPL via the Web and other Fund applications:  I authorize this user to generate Closing Protection Letters via The Fund’s website and other Fund applications.

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. Make sure to save your changes by selecting the “Save” button at 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 their Policy Jackets.

5. From the Main Screen of Closers' Choice, open the File you wish to use as you normally would or create a file and input the information you have available.



6. Make sure you have entered information for your Buyer(s)/Seller(s).

**Borrowers** | Sellers

#	Name	Joining Phrase
1	Patricia Hensen	, an unmarried woman

**Patricia Hensen**

Add | Delete | Type:  Corporation / Estate  Man  Woman

First Name: Patricia Middle: Last Name: Hensen Suffix:

Full Name: Patricia Hensen

Joining Phrase: , an unmarried woman Federal Tax Id: - - -

Foreign Address Zip: 32257- City: Jacksonville State: Florida

Street: 63410 Dogwood Drive

Name attachment (fka, aka):

Phone Numbers: Ext: Types: Email Addresses: 1. pattyhensen@pattyhensen.net

Sign HUD:

Corporate Information: Officer Name: Title: Sub Name: State of Incorporation:

1. 2. 3.

Title Vested in Borrowers:

Names  Names\_Joined  Joined w/ aka

Patricia Hensen

Notes:

Pronoun: she

Use Informant User Name: Password: Auto Notices?

Back Ok Next

7. Verify that you have all the necessary fields completed in the Property screen, particularly Property Street Address.

Property Information: ALT TEST 1 ALT Test 1

File Edit Lists Help

Services Gateway Title Search CPL / Jackets Lien Search Survey eRecording Informant

**Property Address:**

Subdivision / Condo Index: Add

Parcel ID: 65-98521 Type: Residential

Use Buyer Address  Use Seller Address

Street: 5252 Paradise Lane

City: Jacksonville State: Florida Zip: 32246- County: Duval Township:

**Plat / Map / Subdivision / Condominium:**

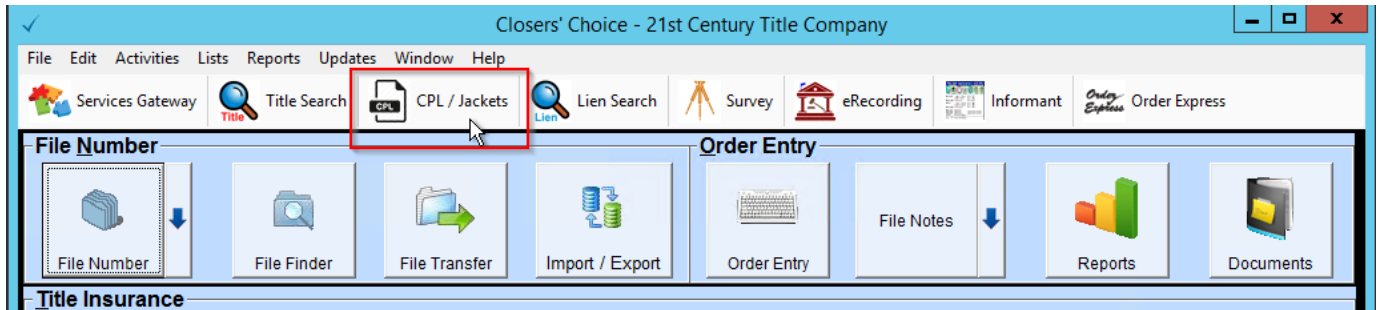
Lot Number(s): Block: Name: Unit: Week: Book: Page: Section: Township: Range: Short Form Legal: Duval County, Florida Refresh

**Taxes:** Tax Year: Taxes Shown on Search: City / Township Tax Base:

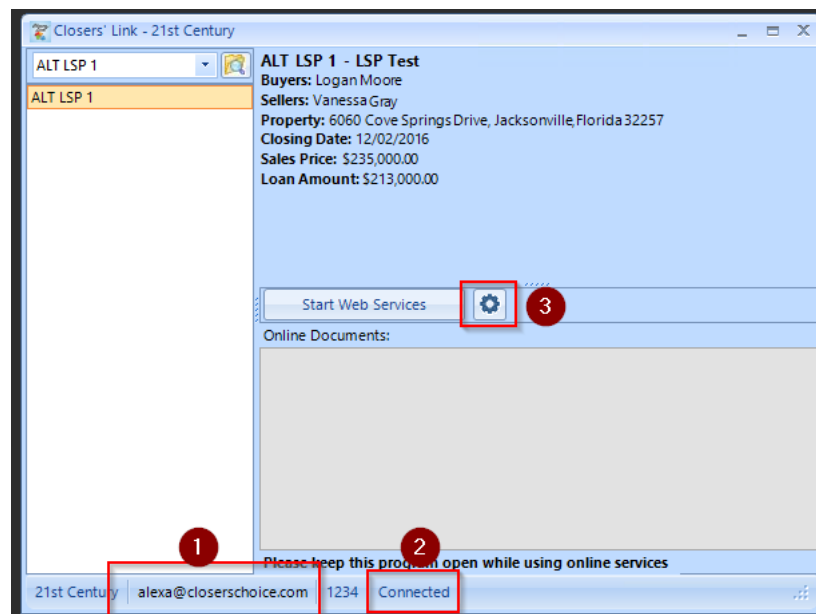
**Assessments:** Land: Improvements: Other: Total: Other Assessment Information:

Back Ok Next

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

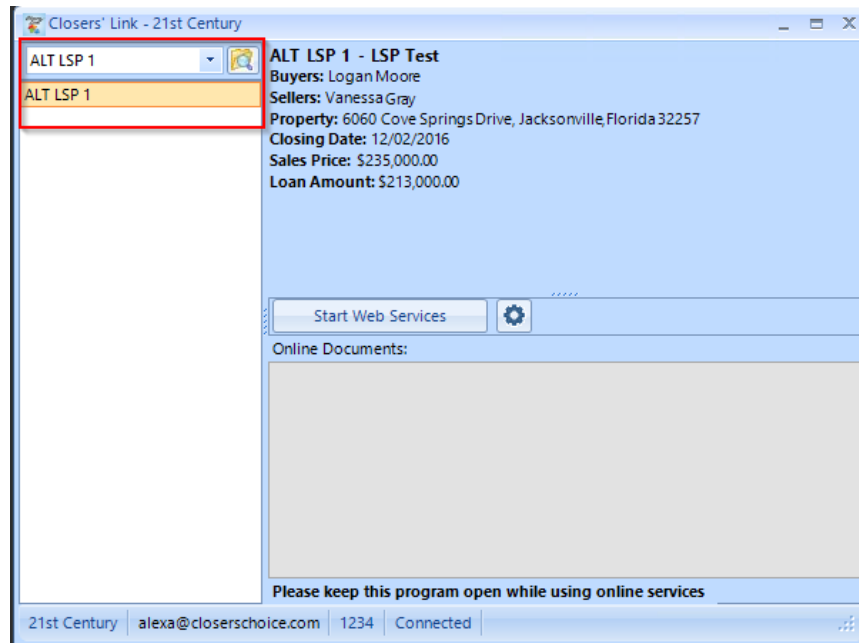


9. The Web Services window opens in your screen. You should always see your correct email address and the words "Connected" at the bottom of this window. If you do not, check the cog button in the middle of the screen next to the "Start Web Services" button to make sure your email and password for Services Gateway are correct. These are your credentials for Services Gateway only, not for the Closers' Choice program or for your underwriter.

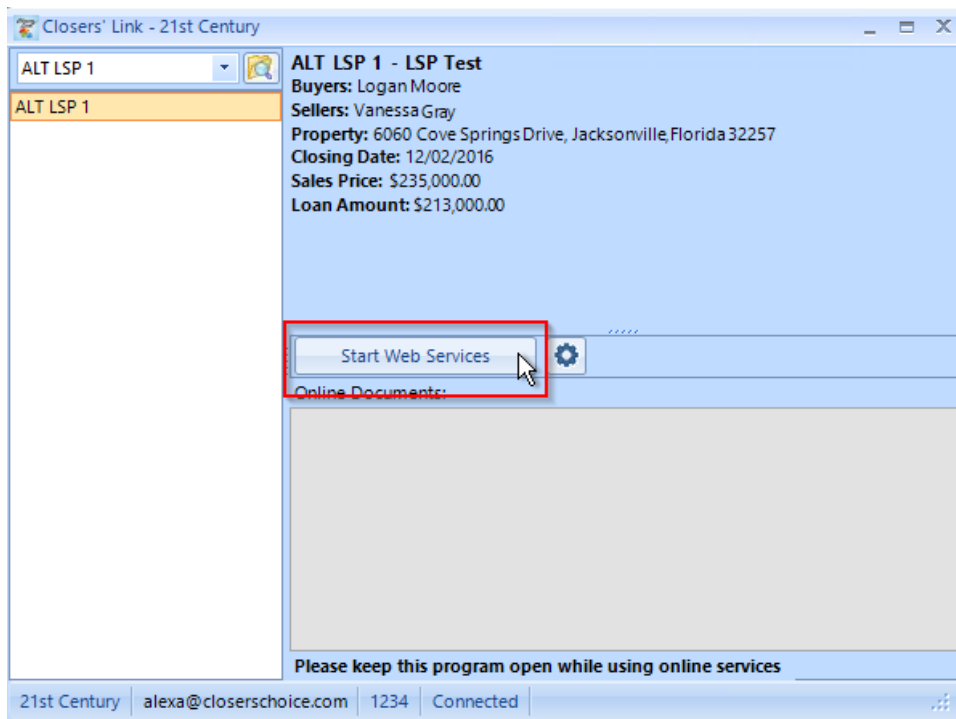




10. Select which file you need to order a CPL or Jacket for in the top left portion of the window. The most recent file you were working in should be the default selection. You can type in the file number, select the drop-down menu for your most recent files, or browse by hitting the magnifying glass icon.




11. Select the "Start Web Services" button in the middle of your screen.



12. You will be re-directed to the Closers' Link website in your default web browser. The main screen shows you all the file information. Anything in red text is an item that is missing from the file that the underwriter will require. You can edit your buyers' and sellers' on this page as well.

*ALT LSP 1 - closing on  
(12/02/2016 at 1:30pm )*




[Options...](#)

Search for files...

General	Buyers	Letters										
<p><b>Property:</b> 6060 Cove Springs Drive Jacksonville, Florida 32257</p> <p><b>County:</b> Duval <b>Township:</b> <b>Type:</b> Residential</p> <p><b>Short Legal:</b> Duval County, Florida</p> <p><b>Lender:</b> Big Bank Lending Inc. 10011 Southside Blvd Jacksonville Florida, 32210</p> <p><b>Loan Number:</b> 652598 <b>Loan Amount:</b> \$213,000.00 <b>Sales Price:</b> \$235,000.00</p>	<p style="text-align: center;"><b>Corp Name</b></p> <table border="1" style="width: 100%; border-collapse: collapse;"><tbody><tr><td style="text-align: center;"><a href="#">Edit</a></td><td style="text-align: center;"><input type="checkbox"/></td><td style="text-align: center;">Logan Moore</td></tr></tbody></table> <p style="text-align: center;"><b>Sellers</b></p> <table border="1" style="width: 100%; border-collapse: collapse;"><thead><tr><th style="text-align: center;">Corp Name</th></tr></thead><tbody><tr><td style="text-align: center;"><a href="#">Edit</a></td><td style="text-align: center;"><input type="checkbox"/></td><td style="text-align: center;">Vanessa Gray</td></tr></tbody></table> <p style="text-align: center;">&lt; &gt;</p>	<a href="#">Edit</a>	<input type="checkbox"/>	Logan Moore	Corp Name	<a href="#">Edit</a>	<input type="checkbox"/>	Vanessa Gray	<table border="1" style="width: 100%; border-collapse: collapse;"><thead><tr><th style="text-align: center;">Category</th><th style="text-align: center;">Type</th><th style="text-align: center;">Date Created</th></tr></thead><tbody></tbody></table>	Category	Type	Date Created
<a href="#">Edit</a>	<input type="checkbox"/>	Logan Moore										
Corp Name												
<a href="#">Edit</a>	<input type="checkbox"/>	Vanessa Gray										
Category	Type	Date Created										

13. Select the green "Options..." button in the top right-hand corner of the page to choose from the underwriters available.

*ALT LSP 1 - closing on  
(12/02/2016 at 1:30pm )*

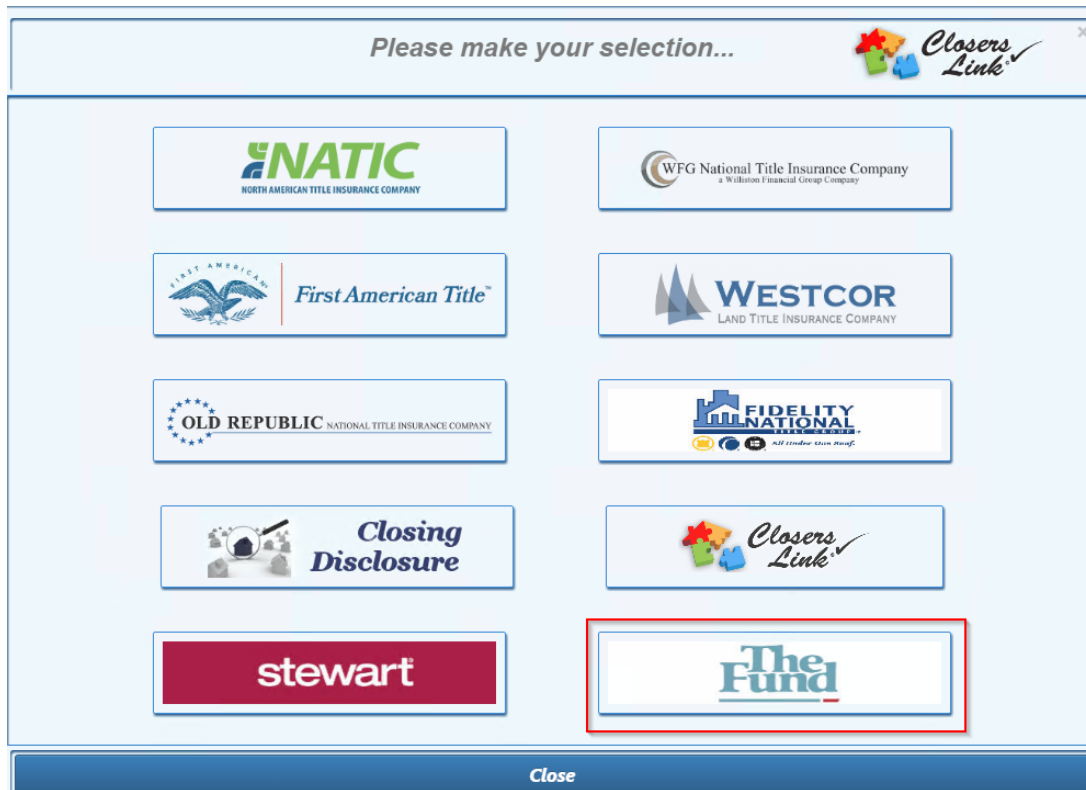


[Options...](#)

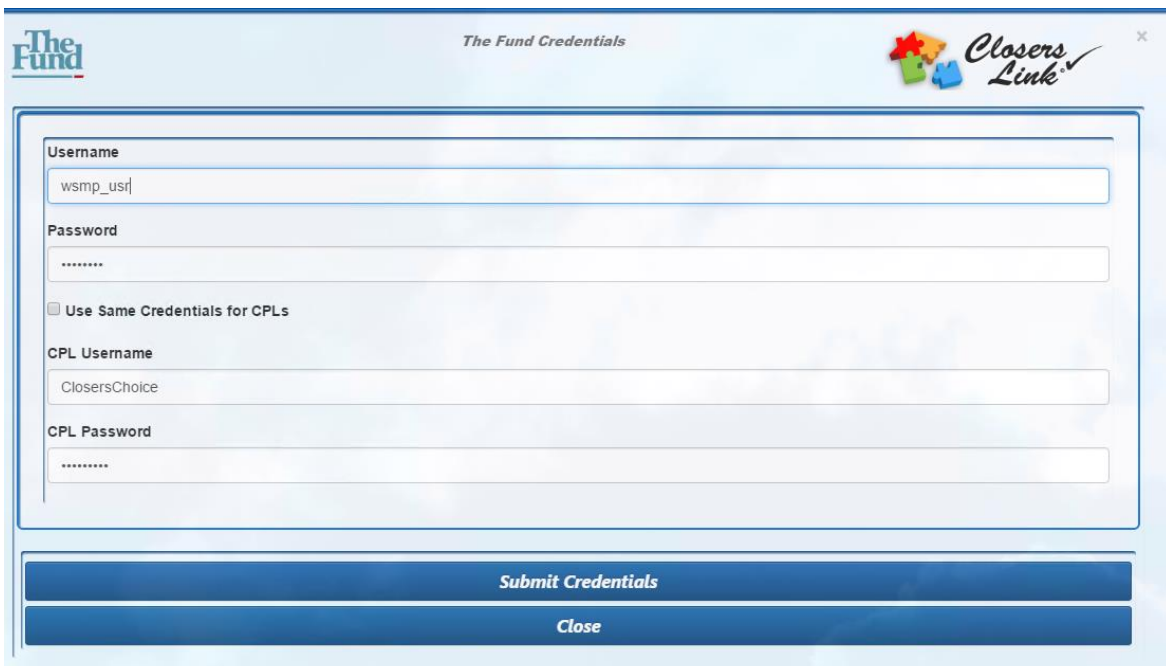
Search for files...

General	Buyers	Letters										
<p><b>Property:</b> 6060 Cove Springs Drive Jacksonville, Florida 32257</p> <p><b>County:</b> Duval <b>Township:</b> <b>Type:</b> Residential</p> <p><b>Short Legal:</b> Duval County, Florida</p> <p><b>Lender:</b> Big Bank Lending Inc. 10011 Southside Blvd Jacksonville Florida, 32210</p> <p><b>Loan Number:</b> 652598 <b>Loan Amount:</b> \$213,000.00 <b>Sales Price:</b> \$235,000.00</p>	<p style="text-align: center;"><b>Corp Name</b></p> <table border="1" style="width: 100%; border-collapse: collapse;"><tbody><tr><td style="text-align: center;"><a href="#">Edit</a></td><td style="text-align: center;"><input type="checkbox"/></td><td style="text-align: center;">Logan Moore</td></tr></tbody></table> <p style="text-align: center;">&lt; &gt;</p> <p style="text-align: center;"><b>Sellers</b></p> <table border="1" style="width: 100%; border-collapse: collapse;"><thead><tr><th style="text-align: center;">Corp Name</th></tr></thead><tbody><tr><td style="text-align: center;"><a href="#">Edit</a></td><td style="text-align: center;"><input type="checkbox"/></td><td style="text-align: center;">Vanessa Gray</td></tr></tbody></table> <p style="text-align: center;">&lt; &gt;</p>	<a href="#">Edit</a>	<input type="checkbox"/>	Logan Moore	Corp Name	<a href="#">Edit</a>	<input type="checkbox"/>	Vanessa Gray	<table border="1" style="width: 100%; border-collapse: collapse;"><thead><tr><th style="text-align: center;">Category</th><th style="text-align: center;">Type</th><th style="text-align: center;">Date Created</th></tr></thead><tbody></tbody></table>	Category	Type	Date Created
<a href="#">Edit</a>	<input type="checkbox"/>	Logan Moore										
Corp Name												
<a href="#">Edit</a>	<input type="checkbox"/>	Vanessa Gray										
Category	Type	Date Created										

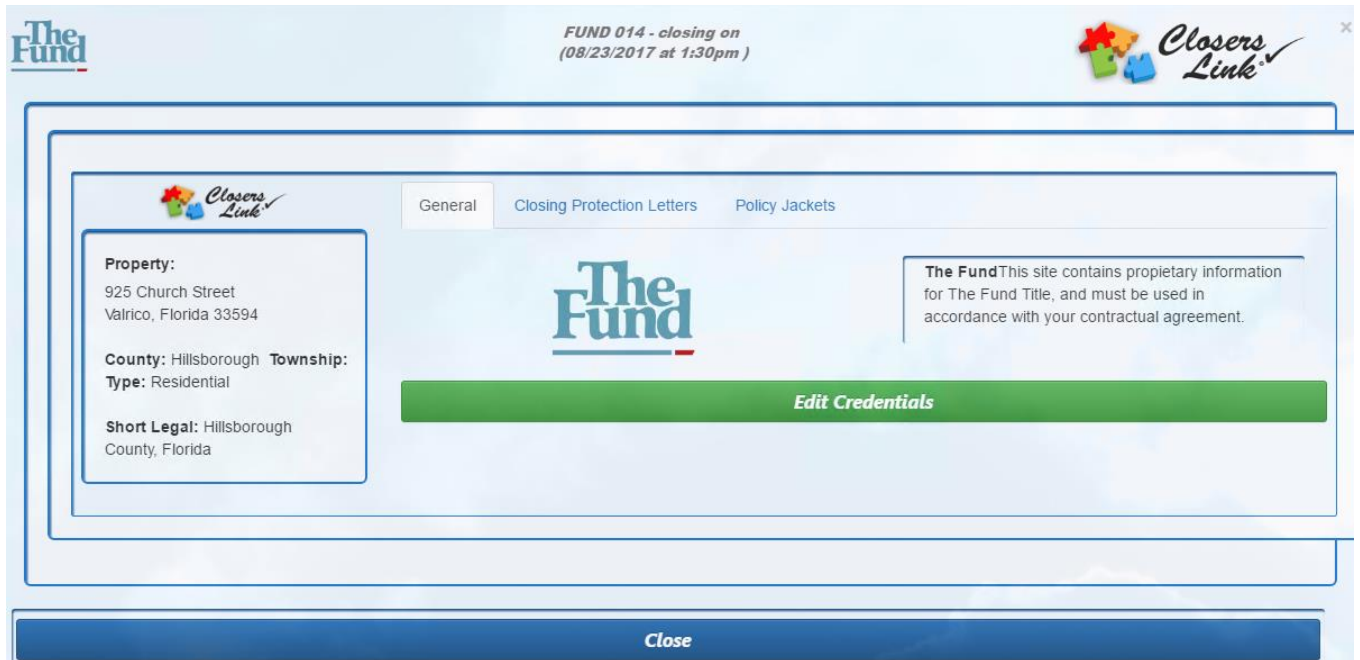
14. The list of underwriters appears in the next window. Select The Fund from the menu.



15. The next screen that opens will be the "Edit Credentials" screen, where first-time users will enter the credentials provided by The Fund. Make sure you see The Fund's logo in the upper left hand corner. If you do not see this logo, contact Closers' Choice to assist you. If you do not have Fund credentials, you will need to speak to The Fund directly.



16. If you ever need to check or change your credentials, select the “Edit Credentials” button on the General Tab of The Fund landing page. It will take you back to the same credentials screen as in Instruction #11 above.



17. The “Closing Protection Letters” tab is the tab next to the “General” tab on the screen. Clicking on this tab will list the selections you need to make to order a CPL.



18. The first section is the Agent section. You are required to complete the “Requesting Branch” field. Select from the Drop-Down menu to choose your branch.

The screenshot shows a software interface with three tabs: 'General', 'Closing Protection Letters', and 'Policy Jackets'. Below the tabs is a blue header labeled 'Agent'. Underneath, there are three input fields: 'Requesting Branch' (a dropdown menu with '20 Test Numbe' selected), 'Member File Reference' (an empty text box), and 'Loan Reference' (an empty text box). A red rectangular box highlights the 'Requesting Branch' dropdown menu.

19. You can add a Member File Reference or a Loan Reference to your CPL as well.

This screenshot is similar to the previous one, showing the 'Agent' section. In addition to the 'Requesting Branch' dropdown, the 'Member File Reference' and 'Loan Reference' text boxes are now highlighted with red rectangular boxes.

20. The next section is the Location section. Select from the “Other Locations” menu or check the box to “Include All Other Locations”

The screenshot shows a section titled 'Locations'. It contains an 'Other Locations' dropdown menu with '1 Test Number' selected. Below this is a checkbox labeled 'Include All Other Locations', which is checked.

21. Under the “Other Locations” field is the “Lender Information” field. Here, all of your Lender Information entered in your Closers’ Choice file will populate. Add additional information as needed, such as Lender Attention.

**Lender Information**

Lender Name James Lending Services

Lender Mortgagee Clause its successors and/or assigns

Lender Attention Frank Jones Lender Suite/Mail

Lender Address 54377 Deerwood Park

Lender Address Line 2

Lender ZipCode 32246 Lender City Jacksonville Lender State Florida

22. The last section is the “Property Information” section. Again, any information entered in your file in Closers’ Choice will automatically populate here for you. Add any additional information, such as “Transaction.” The “Transaction” field is required to obtain a CPL.

**Property Information**

Property Addresss 11 Highland Court

Address Line 2

Property ZipCode 33030 Property City Homestead Property State Florida

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

**Generate CPL**

**Closing Protection Letters**

23. When you are satisfied with your selections, select the green “Generate CPL” button.

**Property Information**

Property Address 11 Highland Court

Address Line 2

Property ZipCode 33030    Property City Homestead    Property State Florida

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

**Generate CPL**

**Closing Protection Letters**

24. You will see the “Closing Protection Letters” field in the bottom of your screen populate with your newly created CPL, along with a red Void button and a green “View” button.

**Generate CPL**

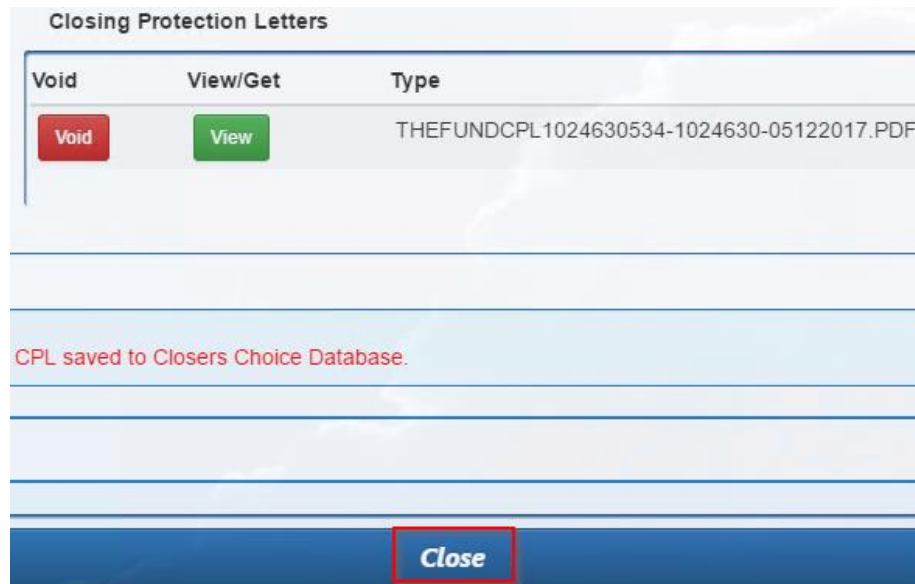
**Closing Protection Letters**

Void	View/Get	Type
<b>Void</b>	<b>View</b>	THEFUND CPL1024629856-1024629-05122017.PDF

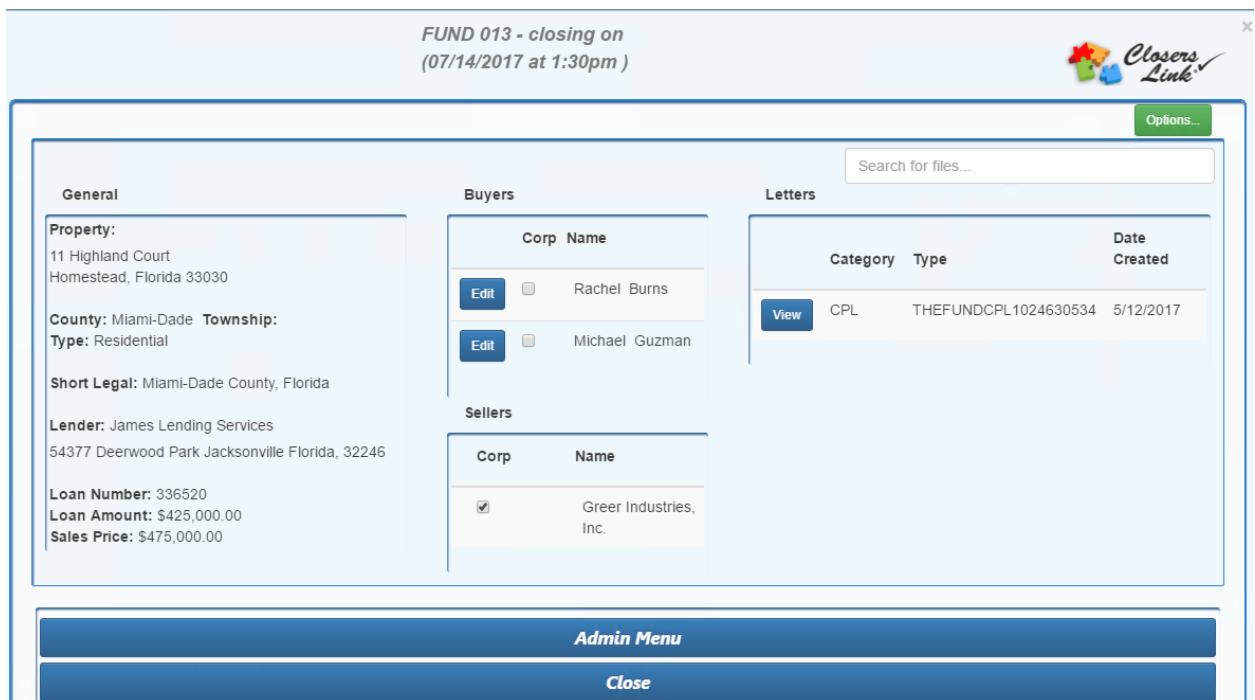
25. To view a CPL, select the green “View” button. The CPL will open in a new web browser tab. If it does not, check your pop-up blocker settings for your browser and try again.

26. To void a CPL, select the red “Void” button. The CPL will now be voided from your account.

27. When you are done placing your CPL orders for a file, select the “Close” button at the bottom of the window.



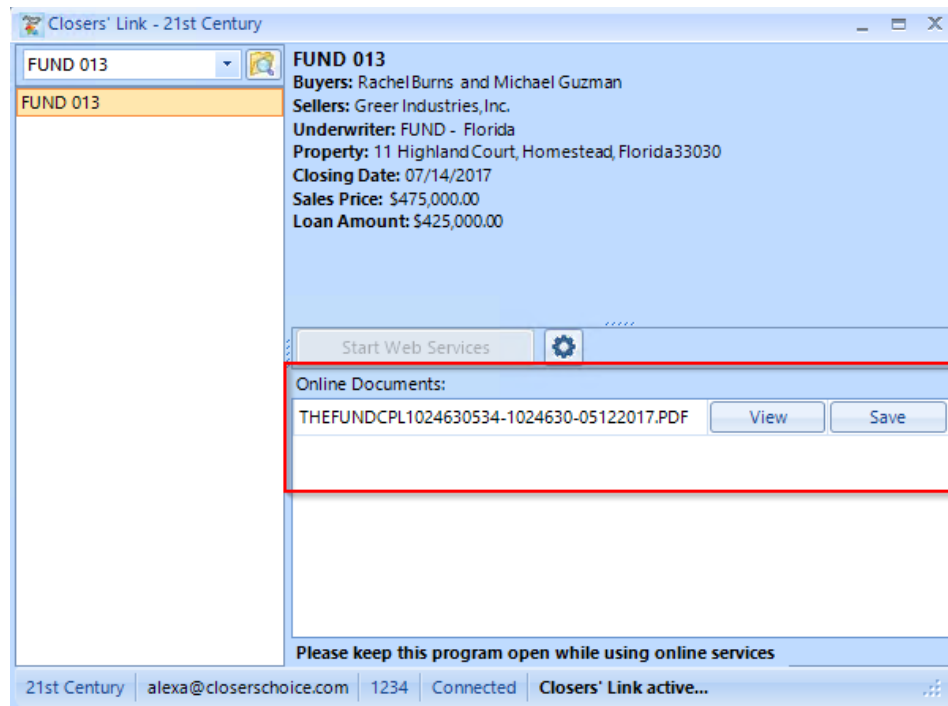
28. You’ll be redirected back to the main landing page for the file. On the far right-hand side, you will now see a list of the documents you ordered in the “Letters” field. You can view any of the documents from this screen.



29. Select the Close button on the bottom of the window to properly close out of the website. Make sure you see a message that says your session is no longer active.



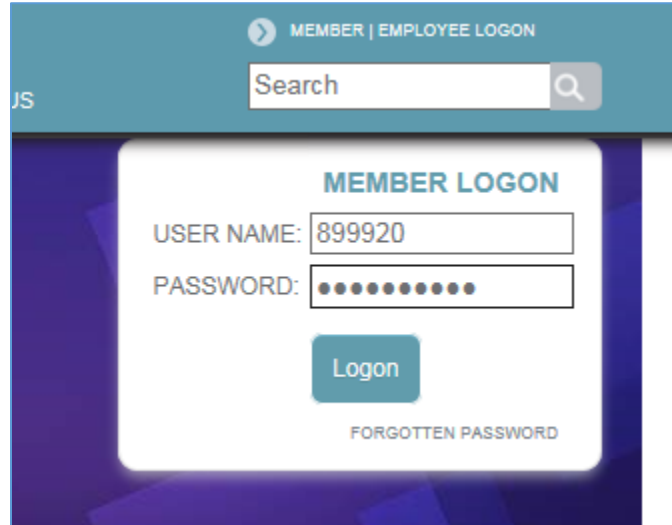
30. Close your web browser window. You will now see all the documents you ordered in the “Online Documents” field of the Web Services window. You can view and print or save these documents into your Closers’ Choice file from here.



31. You should leave this window open if you are ordering documents for more than one file. Note that only one user at a time can order CPLs and Jackets. Selecting the cog button in the middle of the window (to the right of the “Start Web Services” button) should enable the Start Web Services button again if it is grayed out.

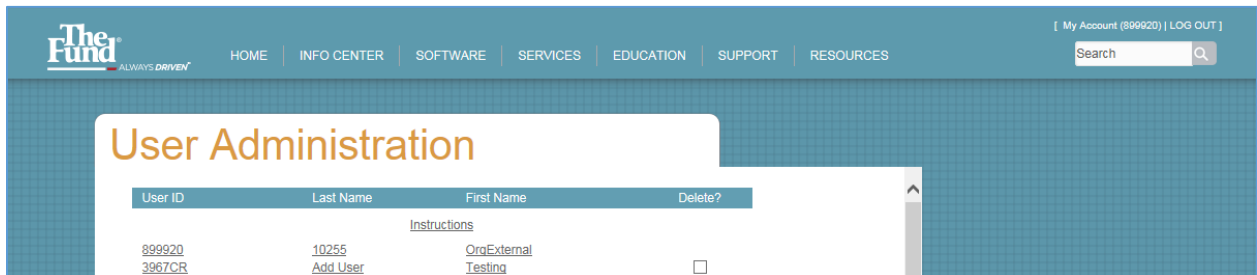
## THE FUND JACKETS USER INSTRUCTIONS

1. First, make sure your office administrator sets up access for your users to use the integration. The office administrator needs to log on to the Fund's website using their administrator credentials.



The screenshot shows the 'MEMBER LOGON' page. At the top, there is a navigation bar with 'MEMBER | EMPLOYEE LOGON' and a search bar. Below the navigation bar, the main content area features a white box with the title 'MEMBER LOGON'. Inside this box, there are two input fields: 'USER NAME:' with the value '899920' and 'PASSWORD:' with a masked password of ten dots. Below the password field is a blue 'Logon' button and a link for 'FORGOTTEN PASSWORD'.

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



The screenshot shows the 'User Administration' page. The page has a teal header with the 'The Fund' logo and navigation links: HOME, INFO CENTER, SOFTWARE, SERVICES, EDUCATION, SUPPORT, RESOURCES. There is also a search bar and a user account indicator: '[ My Account (899920) | LOG OUT ]'. The main content area features a white box with the title 'User Administration' and a table of users.

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

- To be able to receive Policies through the integration, under the “User Access Rights” heading, find the subsection called “DoubleTime eSolutions Access.” Select the radial 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: tfallon@thefund.com

Confirm Email: tfallon@thefund.com

First Name: Testing

Last Name: Add User

**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:

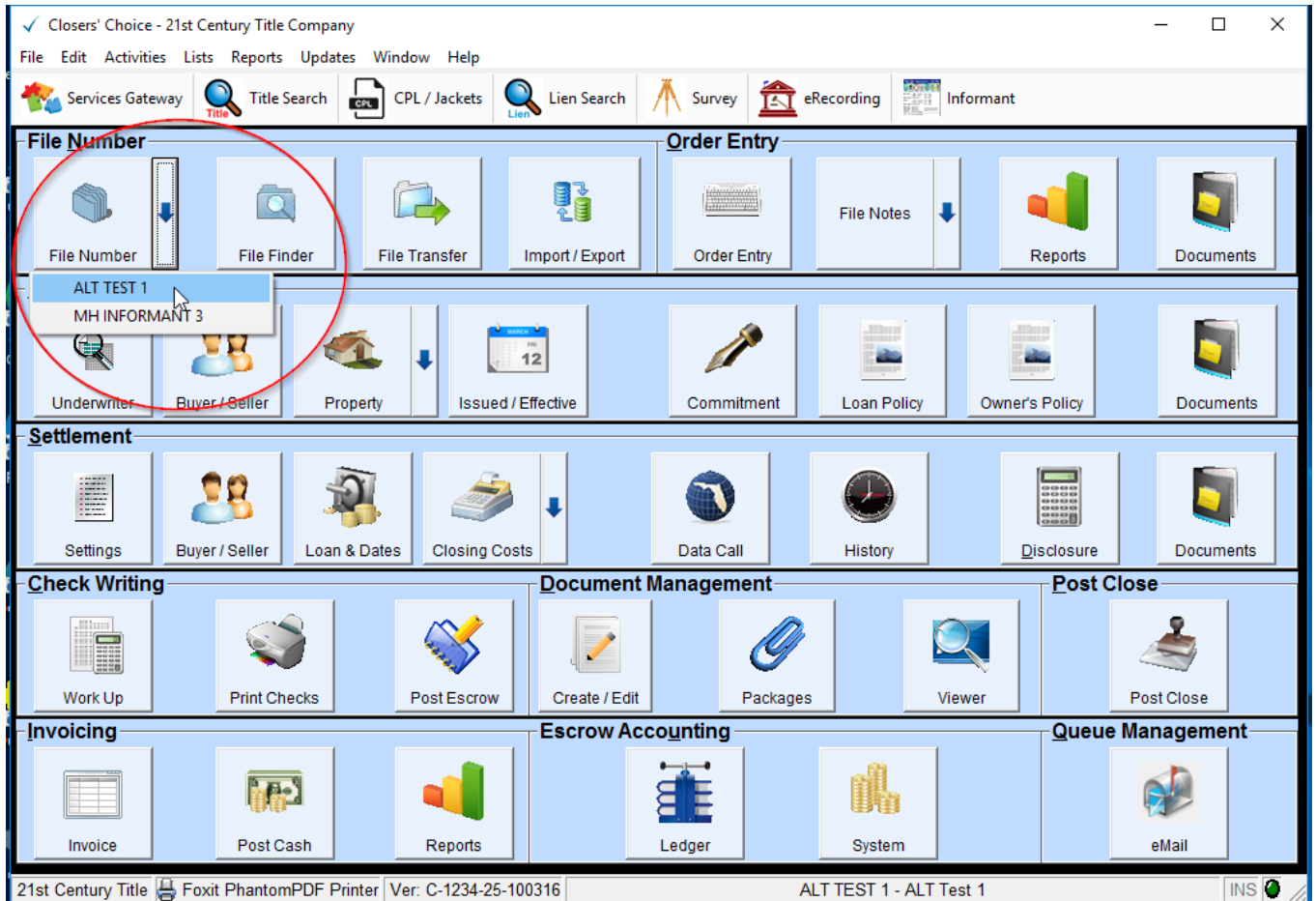
- None
- Commitment Number Request Only
- Electronic Delivery of Fund Forms**
- User can access DoubleTime's Electronic Payment service

**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

- Make sure to save your changes by selecting the “Save” button at 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 their Policy Jackets.

5. From the Main Screen of Closers' Choice, open the File you wish to use as you normally would or create a file and input the information you have available.



6. Make sure you have entered information for your Buyer(s)/Seller(s).

**Borrowers** | Sellers

#	Name	Joining Phrase
1	Patricia Hensen	, an unmarried woman

**Patricia Hensen**

Type:  Corporation / Estate  Man  Woman

First Name: Patricia Middle: Last Name: Hensen Suffix:

Full Name: Patricia Hensen

Joining Phrase: , an unmarried woman Federal Tax Id: - - -

Foreign Address Zip: 32257- City: Jacksonville State: Florida

Street: 63410 Dogwood Drive

Name attachment (fka, aka):

Phone Numbers: Ext: Types: Email Addresses: 1. pattyhensen@pattyhensen.net

Sign HUD:

Corporate Information: Officer Name: Title: Sub Name: State of Incorporation:

Use Informant:  User Name: Password: Auto Notices?

Back Ok Next

7. Verify that you have all the necessary fields completed in the Property screen, particularly Property Street Address.

Property Information: ALT TEST 1 ALT Test 1

File Edit Lists Help

Services Gateway Title Search CPL / Jackets Lien Search Survey eRecording Informant

**Property Address:**

Subdivision / Condo Index: Parcel ID: 65-98521 Type: Residential

Use Buyer Address Use Seller Address

Street: 5252 Paradise Lane

City: Jacksonville State: Florida Zip: 32246- County: Duval Township:

**Plat / Map / Subdivision / Condominium:**

Lot Number(s): Block: Name: Unit: Week: Book: Page: Section: Township: Range: Short Form Legal: Duval County, Florida Refresh

**Taxes:**

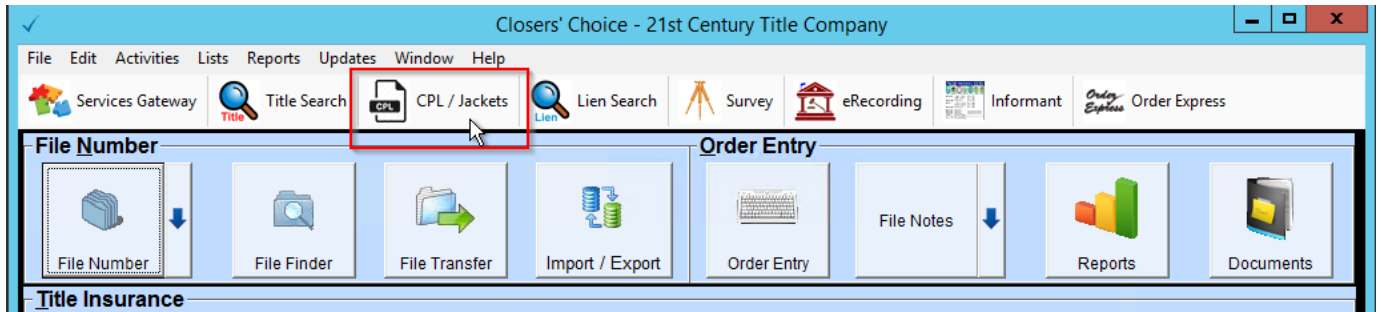
Tax Year: Taxes Shown on Search: City / Township Tax Base:

**Assessments:**

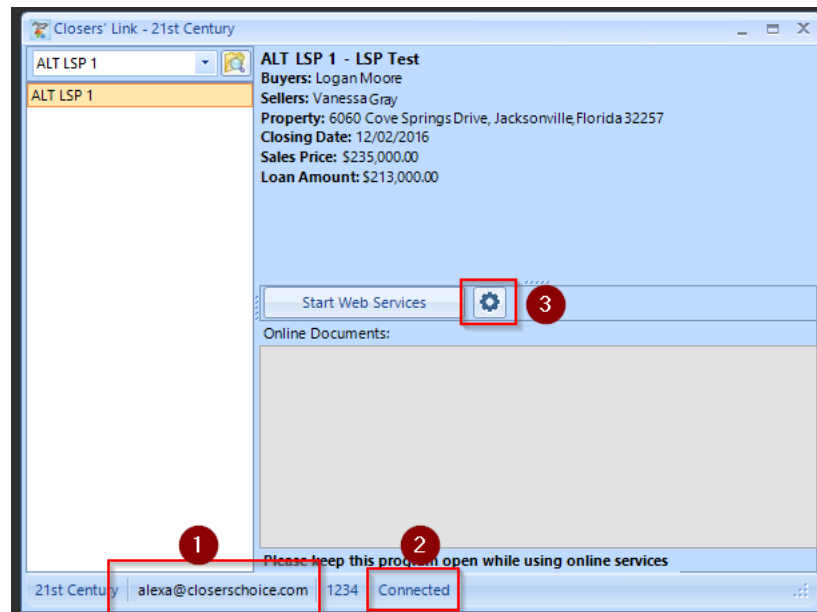
Land: Improvements: Other: Total: Other Assessment Information:

Back Ok Next

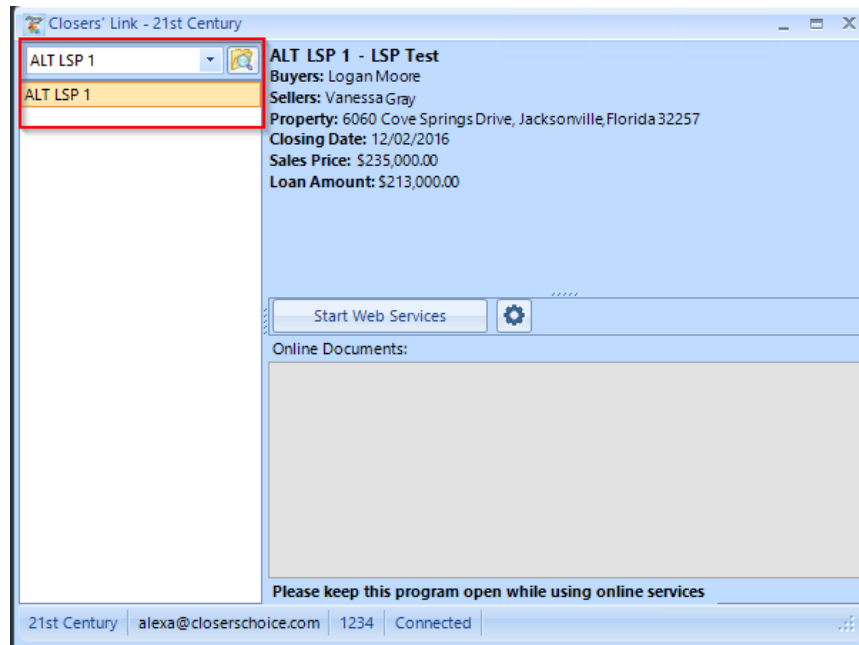
8. Select the CPL/Jackets button from the Services Gateway toolbar at the top of the main screen of Closers' Choice.



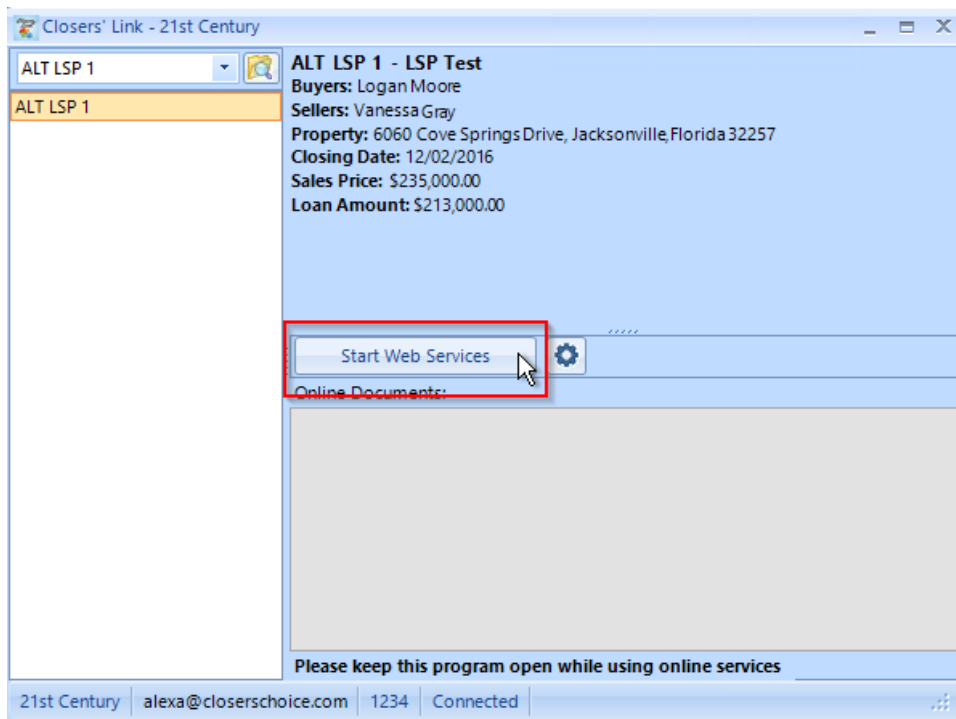
9. The Web Services window opens in your screen. You should always see your correct email address and the words "Connected" at the bottom of this window. If you do not, check the cog button in the middle of the screen next to the "Start Web Services" button to make sure your email and password for Services Gateway are correct. These are your credentials for Services Gateway only, not for the Closers' Choice program or for your underwriter.



10. Select which file you need to order a CPL or Jacket for in the top left portion of the window. The most recent file you were working in should be the default selection. You can type in the file number, select the drop-down menu for your most recent files, or browse by hitting the magnifying glass icon.




11. Select the "Start Web Services" button in the middle of your screen.



12. You will be re-directed to the Closers' Link website in your default web browser. The main screen shows you all the file information. Anything in red text is an item that is missing from the file that the underwriter will require. You can edit your buyers' and sellers' on this page as well.

*ALT LSP 1 - closing on  
(12/02/2016 at 1:30pm )*




[Options...](#)

Search for files...

General	Buyers	Letters												
<p><b>Property:</b> 6060 Cove Springs Drive Jacksonville, Florida 32257</p> <p><b>County:</b> Duval <b>Township:</b> <b>Type:</b> Residential</p> <p><b>Short Legal:</b> Duval County, Florida</p> <p><b>Lender:</b> Big Bank Lending Inc. 10011 Southside Blvd Jacksonville Florida, 32210</p> <p><b>Loan Number:</b> 652598 <b>Loan Amount:</b> \$213,000.00 <b>Sales Price:</b> \$235,000.00</p>	<p style="text-align: center;"><b>Corp Name</b></p> <table border="1" style="width: 100%; border-collapse: collapse;"><tbody><tr><td style="text-align: center;"><a href="#">Edit</a></td><td style="text-align: center;"><input type="checkbox"/></td><td style="text-align: center;">Logan Moore</td></tr></tbody></table> <p style="text-align: center;"><b>Sellers</b></p> <p style="text-align: center;"><b>Corp Name</b></p> <table border="1" style="width: 100%; border-collapse: collapse;"><tbody><tr><td style="text-align: center;"><a href="#">Edit</a></td><td style="text-align: center;"><input type="checkbox"/></td><td style="text-align: center;">Vanessa Gray</td></tr></tbody></table> <p style="text-align: center;">&lt; &gt;</p>	<a href="#">Edit</a>	<input type="checkbox"/>	Logan Moore	<a href="#">Edit</a>	<input type="checkbox"/>	Vanessa Gray	<table border="1" style="width: 100%; border-collapse: collapse;"><thead><tr><th style="width: 33%;">Category</th><th style="width: 33%;">Type</th><th style="width: 33%;">Date Created</th></tr></thead><tbody><tr><td colspan="3" style="height: 100px;"></td></tr></tbody></table>	Category	Type	Date Created			
<a href="#">Edit</a>	<input type="checkbox"/>	Logan Moore												
<a href="#">Edit</a>	<input type="checkbox"/>	Vanessa Gray												
Category	Type	Date Created												

13. Select the green "Options..." button in the top right-hand corner of the page to choose from the underwriters available.

*ALT LSP 1 - closing on  
(12/02/2016 at 1:30pm )*



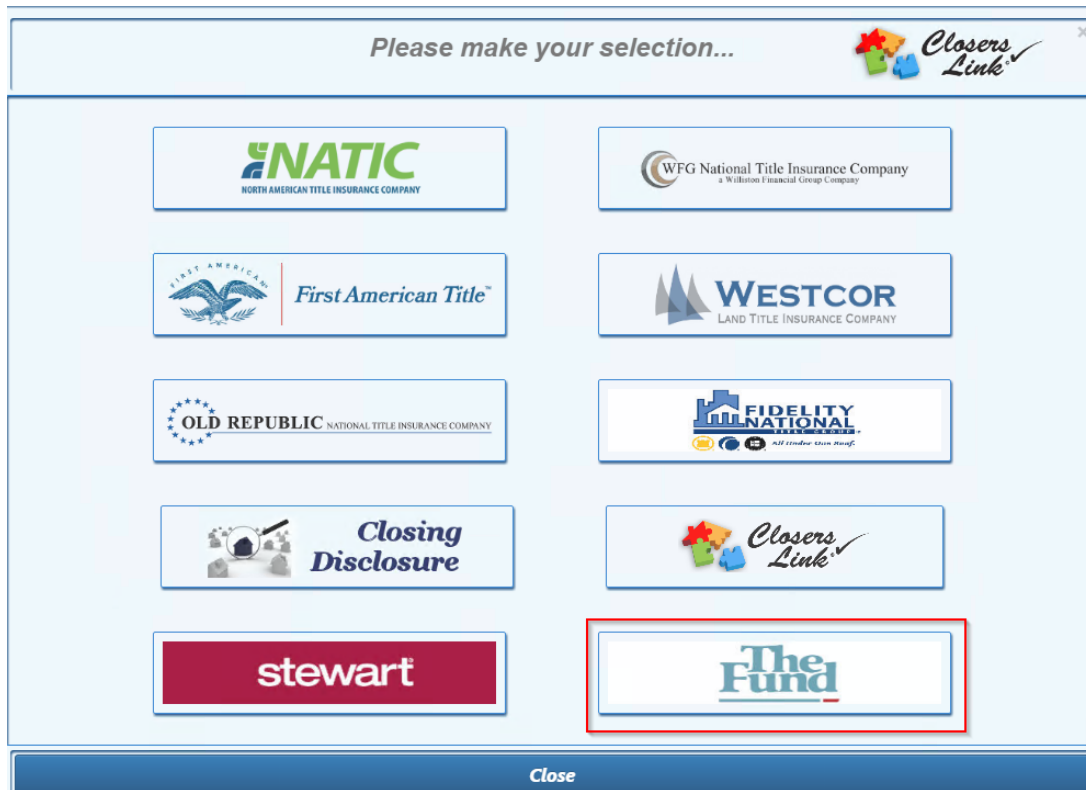
[Options...](#)

Search for files...

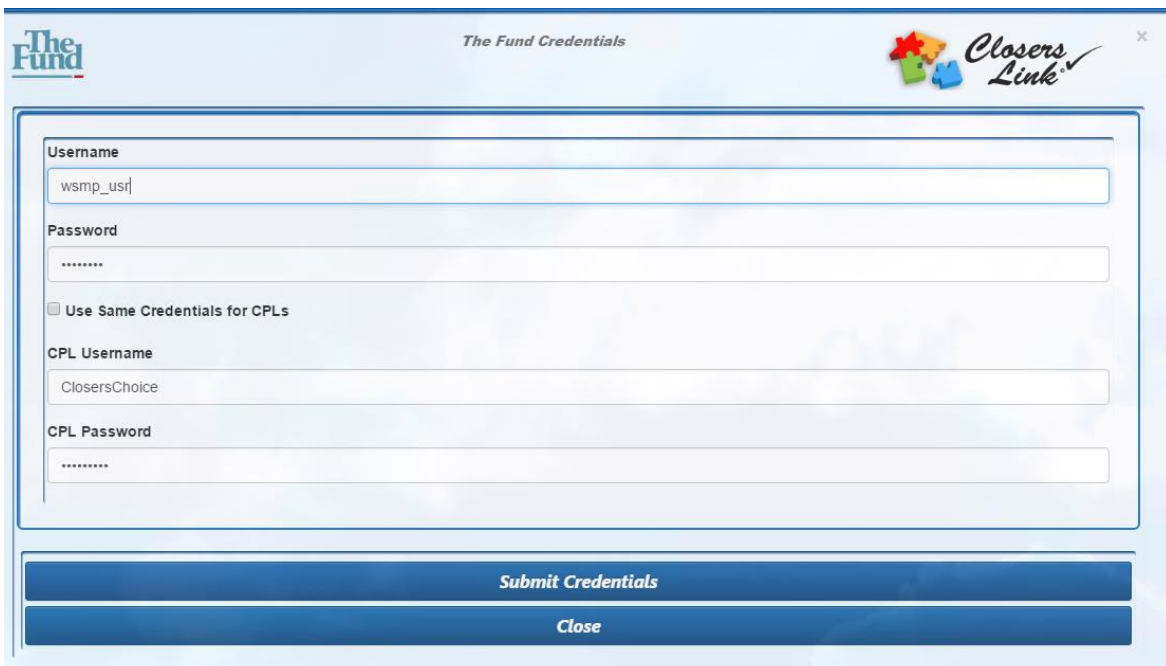
General	Buyers	Letters												
<p><b>Property:</b> 6060 Cove Springs Drive Jacksonville, Florida 32257</p> <p><b>County:</b> Duval <b>Township:</b> <b>Type:</b> Residential</p> <p><b>Short Legal:</b> Duval County, Florida</p> <p><b>Lender:</b> Big Bank Lending Inc. 10011 Southside Blvd Jacksonville Florida, 32210</p> <p><b>Loan Number:</b> 652598 <b>Loan Amount:</b> \$213,000.00 <b>Sales Price:</b> \$235,000.00</p>	<p style="text-align: center;"><b>Corp Name</b></p> <table border="1" style="width: 100%; border-collapse: collapse;"><tbody><tr><td style="text-align: center;"><a href="#">Edit</a></td><td style="text-align: center;"><input type="checkbox"/></td><td style="text-align: center;">Logan Moore</td></tr></tbody></table> <p style="text-align: center;">&lt; &gt;</p> <p style="text-align: center;"><b>Sellers</b></p> <p style="text-align: center;"><b>Corp Name</b></p> <table border="1" style="width: 100%; border-collapse: collapse;"><tbody><tr><td style="text-align: center;"><a href="#">Edit</a></td><td style="text-align: center;"><input type="checkbox"/></td><td style="text-align: center;">Vanessa Gray</td></tr></tbody></table> <p style="text-align: center;">&lt; &gt;</p>	<a href="#">Edit</a>	<input type="checkbox"/>	Logan Moore	<a href="#">Edit</a>	<input type="checkbox"/>	Vanessa Gray	<table border="1" style="width: 100%; border-collapse: collapse;"><thead><tr><th style="width: 33%;">Category</th><th style="width: 33%;">Type</th><th style="width: 33%;">Date Created</th></tr></thead><tbody><tr><td colspan="3" style="height: 100px;"></td></tr></tbody></table>	Category	Type	Date Created			
<a href="#">Edit</a>	<input type="checkbox"/>	Logan Moore												
<a href="#">Edit</a>	<input type="checkbox"/>	Vanessa Gray												
Category	Type	Date Created												



14. The list of underwriters appears in the next window. Select The Fund from the menu.



15. The next screen that opens will be the "Edit Credentials" screen, where first-time users will enter the credentials provided by The Fund. Make sure you see The Fund's logo in the upper left hand corner. If you do not see this logo, contact Closers' Choice to assist you. If you do not have Fund credentials, you will need to speak to The Fund directly.



16. If you ever need to check or change your credentials, select the “Edit Credentials” button on the General Tab of The Fund landing page. It will take you back to the same credentials screen as in Instruction #11 above.



17. The “Policy Jackets” tab is the tab next to the “General” tab on the screen. Clicking on this tab will list the selections you need to make to order a Jacket.



18. The first section is the File Information section. You are required to complete the “Branch Locations” field. Select from the Drop-Down menu to choose your branch. The rest of the fields should automatically populate from the data already entered in your Closers’ Choice file.

**File Information**

Branch Locations 2-THE FUND HEADQUARTERS ▾

Closing File Number THE FUND 101 Closing Date 08/30/2017

Property Address 149 Piper Avenue

Address line 2

City Jacksonville State FL Zip 32246 County Duval

Short Legal Description Duval County, Florida

19. The next section is the Policy Information section. Here, you are required to select a Policy Type from the drop-down menu. Only Policy Jackets are available through the integration at this time (Mortgagee and Owner). Commitment Jackets are not available through the integration currently, but can be ordered through The Fund’s website. Enter in the additional information in the remaining fields.

**Policy Information**

Policy Type 06 - Mortgagee Policy ▾

Policy Exposure Amount

Name of the Insured

Get Jacket

20. When you have reviewed your selections and are ready to order, select the green “Get Jacket” button at the bottom of the screen.

Policy Information

Policy Type: 06 - Mortgagee Policy

Policy Exposure Amount

Name of the Insured

Get Jacket

21. You will see the “Policy Jackets” field in the bottom of your screen populate with your newly created Jacket, along with a red Void button and a green “View” button.

Policy Jackets

Void	View/Get	Type
<a href="#">Void</a>	<a href="#">View</a>	THEFUNDJACKET8264151671-8264151-05192017.PDF

Jacket saved to Closers Choice Database.

22. To view a Jacket, select the green “View” button. The Jacket will open in a new web browser tab. If it does not, check your pop-up blocker settings for your browser and try again.
23. To void a Jacket, select the red “Void” button. The Jacket will now be voided from your account.
24. When you are done placing your Jacket orders for a file, select the “Close” button at the bottom of the window.

**Policy Jackets**


Void	View/Get	Type
<a href="#">Void</a>	<a href="#">View</a>	THEFUNDJACKET8264151671-8264151-05192017.PDF

Jacket saved to Closers Choice Database.

[Close](#)

25. You'll be redirected back to the main landing page for the file. On the far right-hand side, you will now see a list of the documents you ordered in the "Letters" field. You can view any of the documents from this screen.

FUND 013 - closing on  
(07/14/2017 at 1:30pm)



[Options...](#)

Search for files...

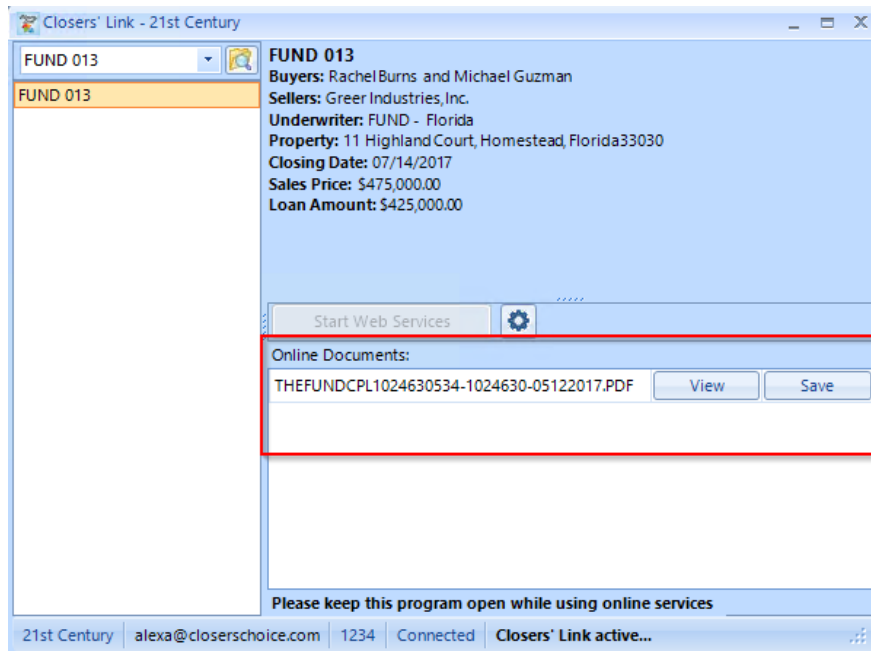
General		Buyers		Letters													
<b>Property:</b> 11 Highland Court Homestead, Florida 33030  <b>County:</b> Miami-Dade <b>Township:</b> <b>Type:</b> Residential  <b>Short Legal:</b> Miami-Dade County, Florida  <b>Lender:</b> James Lending Services 54377 Deerwood Park Jacksonville Florida, 32246  <b>Loan Number:</b> 336520 <b>Loan Amount:</b> \$425,000.00 <b>Sales Price:</b> \$475,000.00		<b>Corp Name</b>  <a href="#">Edit</a> <input type="checkbox"/> Rachel Burns  <a href="#">Edit</a> <input type="checkbox"/> Michael Guzman  <b>Sellers</b>  <table border="1"> <thead> <tr> <th>Corp</th> <th>Name</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td>Greer Industries, Inc.</td> </tr> </tbody> </table>		Corp	Name	<input checked="" type="checkbox"/>	Greer Industries, Inc.	<table border="1"> <thead> <tr> <th>Category</th> <th>Type</th> <th>Date Created</th> </tr> </thead> <tbody> <tr> <td><a href="#">View</a></td> <td>CPL</td> <td>THEFUNDCPL1024630534</td> <td>5/12/2017</td> </tr> </tbody> </table>			Category	Type	Date Created	<a href="#">View</a>	CPL	THEFUNDCPL1024630534	5/12/2017
Corp	Name																
<input checked="" type="checkbox"/>	Greer Industries, Inc.																
Category	Type	Date Created															
<a href="#">View</a>	CPL	THEFUNDCPL1024630534	5/12/2017														

**Admin Menu**

[Close](#)

26. Select the Close button on the bottom of the window to properly close out of the website. Make sure you see a message that says your session is no longer active.

27. Close your web browser window. You will now see all the documents you ordered in the "Online Documents" field of the Web Services window. You can view and print or save these documents into your Closers' Choice file from here.



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