

# landtech



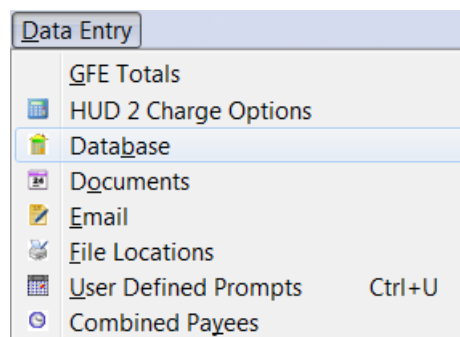
## The Fund Underwriter Service

*Landtech* provides built-in integration with The Fund Title Insurance Company's web based underwriter service. This enables you to access their web based service from within *Landtech* to request and receive Closing Protection Letters (CPL), title insurance policy jackets, commitments and title searches.

### Initializing The Fund's Underwriter Service


To activate The Fund's underwriter service in *Landtech*, you must enter your login credentials. These are provided by The Fund. To do so, you will need to access the *Company* database.

- Click on *Data Entry* on the menu bar or press **ALT + D**. The *Data Entry* drop-down menu will be displayed.



- Click on **Database** or press **B**. The **Databases** dialog box will be displayed with the **Company** database presented first.

There is a button located on the lower right of the **Company** database dialog box labeled **Services**. Clicking this button will display a dialog box enabling you to enter your login credentials for The Fund’s underwriter service.

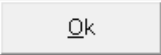
- To enter your login credentials, click . The **Services** dialog box will be displayed with **Underwriter** as the first tab.
- Click on the **The Fund** button to display The Fund Title Insurance Company’s initialization screen.

The Fund underwriter service may require a unique set of login credentials for each user. If this is the case, all you have to do is click on the **Use Individual ID** check box to activate The Fund underwriter service. Each user will then be prompted for their login credentials each time they access **The Fund Product Request** facility.

However, fields for login credentials are provided here in the event there should only be one set of login credentials for your office to access The Fund underwriter service. If this is the case, you can enter your login credentials here and these login credentials will always be used to access The Fund underwriter service. You will not be prompted to enter your login credentials each time you access the **The Fund Product Request** facility.

- If you are entering your login credentials here, click on the **ID** text box and enter your logon ID.
- Click on the **Password** text box and enter your password.
- If you would like to see the password as you enter it, click on the **Show Password** check box. Doing so will help to ensure that you have entered your password correctly.

**Note:** The **Show Password** check box will only be available the first time you enter your login credentials. Once you save the credentials by closing the **Services** dialog box, you will no longer have the option to see your password.

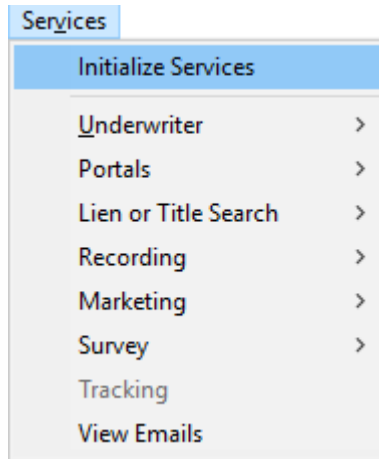
- Click  or press **ALT + O** to save the initialization and close the **Services** dialog box.


**Note:** If you currently request title products from The Fund's web service through their web site, the login credentials you use should work seamlessly here. Therefore, use the same login credentials when initializing or accessing The Fund's web service through **Landtech**.

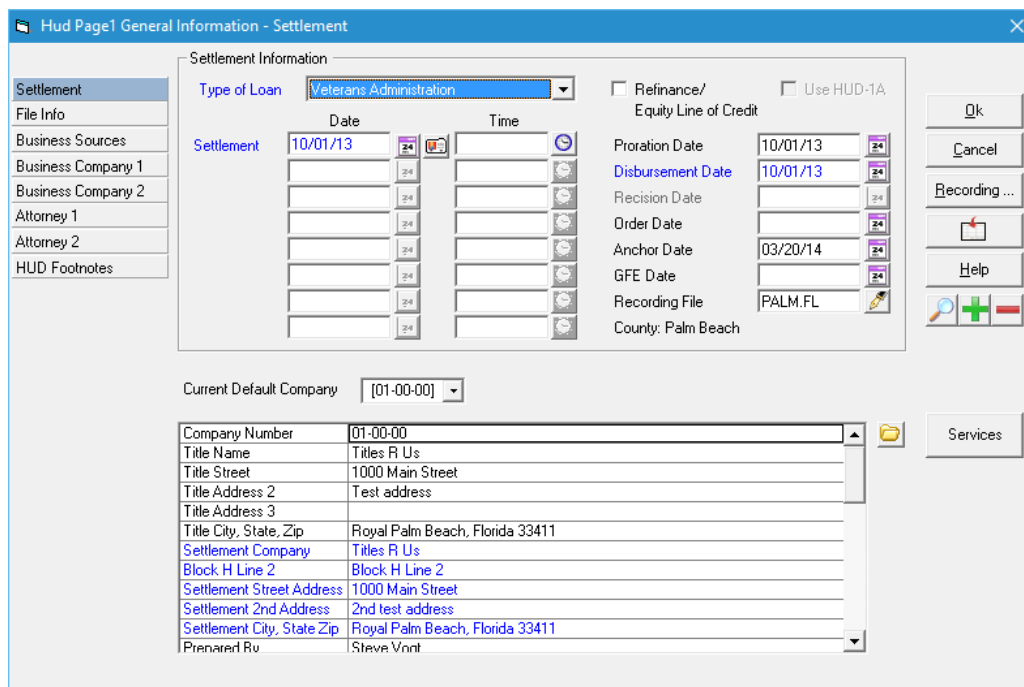
This initializes The Fund for the selected company only. If you have additional companies in your database that need to be initialized for access to The Fund underwriter service, select the company or companies in the **Company** database and repeat the initialization process explained above for each company. This only needs to be done one time for each company.

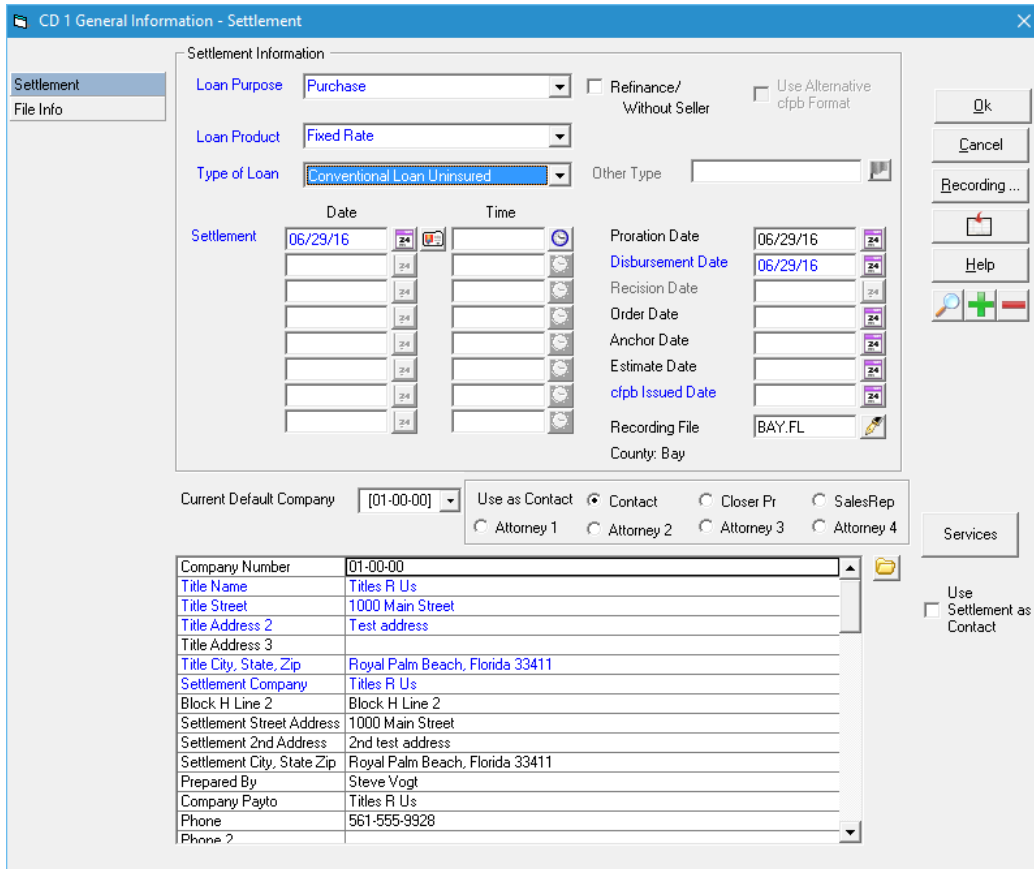
If you are in a closing file, there are a couple of additional ways you can access the **Services** dialog box.

- Click on **Services** on the menu bar or press **ALT + V**. The **Services** drop-down menu will be displayed.



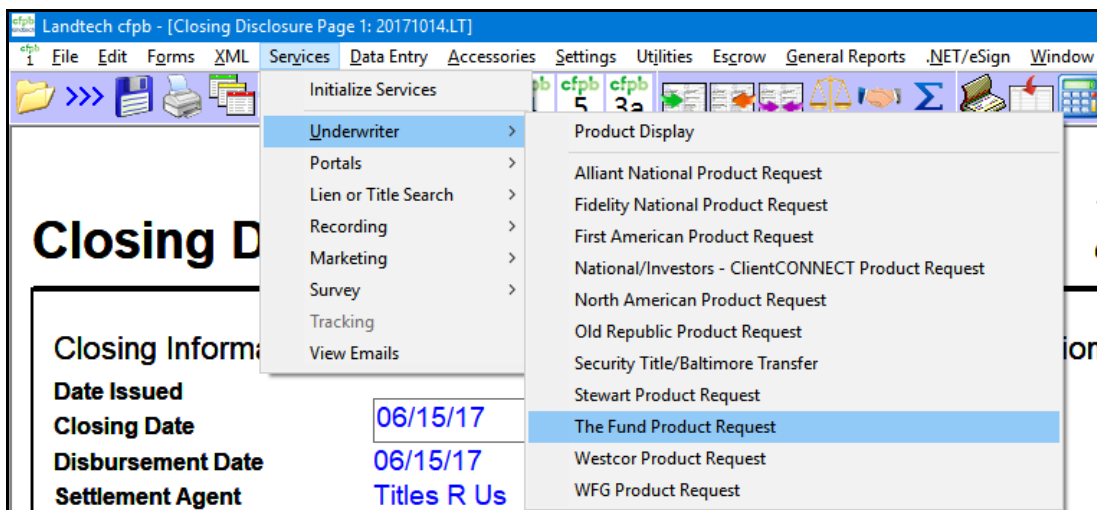
- Click on **Initialize Services**. The **Services** dialog box will be displayed.
- You can also click on the **Initialize Services** toolbar button  to access the **Services** dialog box.
- And finally, there is a button labeled **Services** on the **Settlement** screen of the **HUD Page 1 General Information** dialog box in **Landtech XML** and the **Settlement** screen of the **CD 1 General Information** dialog box in **Landtech cfpb** that will enable you to gain access to the **Services** dialog box.





**Note:** Accessing the *Services* dialog box from within a closing file will initialize The Fund underwriter service for the company selected in the closing file only. If additional companies need to be initialized, you will need to use the method described previously.

Once initialized, the *Product Display* and *The Fund Product Request* items become available and ready for use on the Underwriter menu under the *Services* menu bar item in *Landtech*.

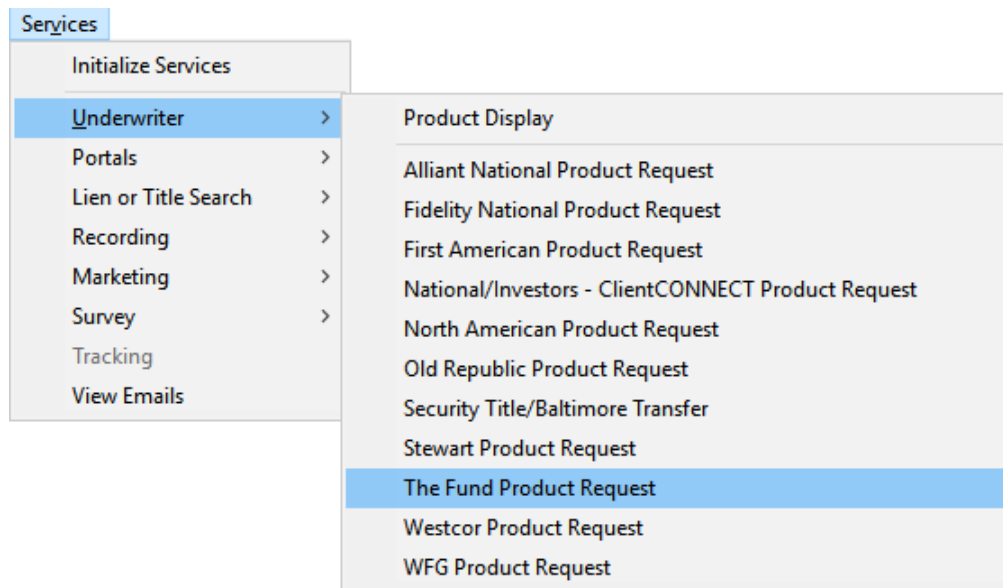


## The Fund Product Request

*The Fund Product Request* enables you to request and receive Closing Protection Letters (CPL), title insurance policy jackets, commitments and title search results from The Fund's web based service through *Landtech*.

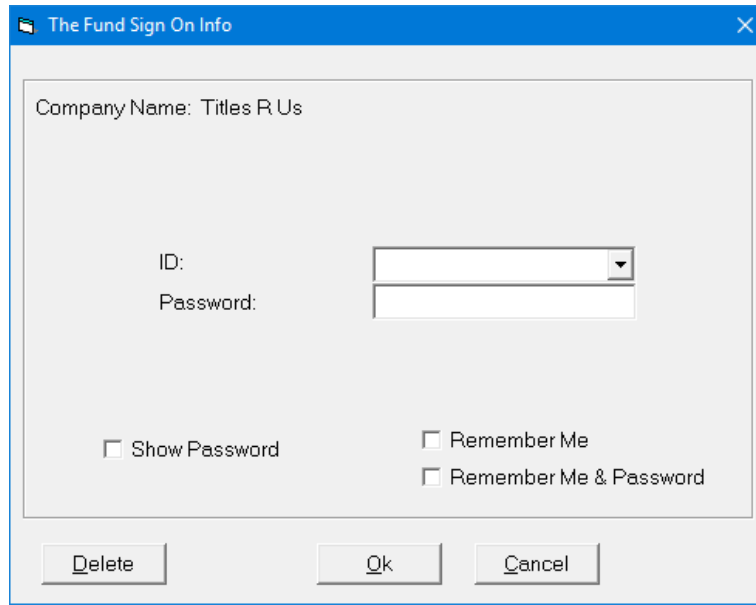
To request a product from The Fund's web service:

- Click on *Services* on the menu bar or press **ALT + V**. The *Services* drop-down menu is displayed.
- Position the mouse pointer on *Underwriter* or press **U**. The *Underwriter* menu will be displayed.



- Click on *The Fund Product Request*.

If each user must have unique login credentials, you will be prompted to enter your login credentials in order to access the product request facility.



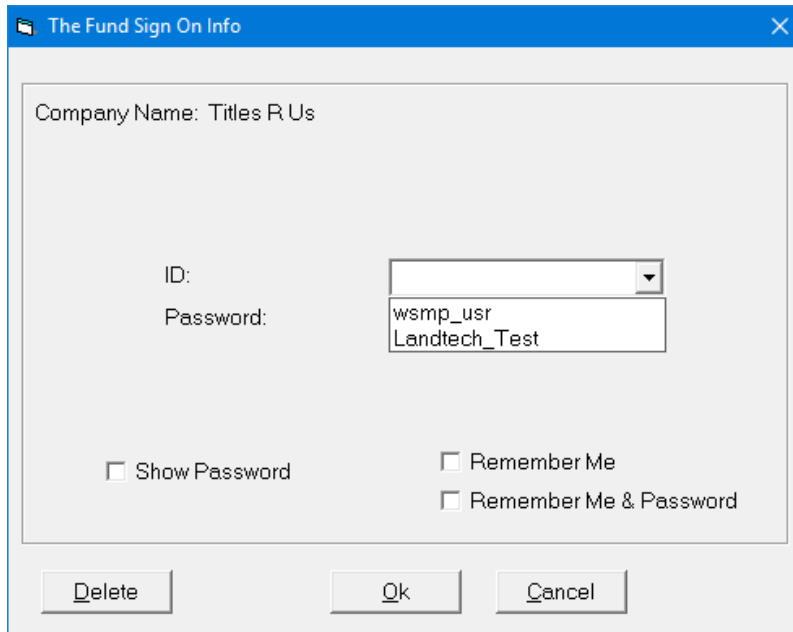
- Enter your login ID in the **ID** text box.
- Enter your password in the **Password** text box.
- If you would like to see the password as you enter it, click on the **Show Password** check box. Doing so will help to ensure that you have entered your password correctly.



**Note:** The **Show Password** check box will only be available the first time you enter your login credentials. Once you save the credentials, you will no longer have the option to see your password.

- If you would like the program to remember your login ID so that you do not have to enter it every time, click on the **Remember Me** check box. From this point forward, each time you access the product request facility, your login ID will be loaded automatically. However, you will still have to enter your password.
- If you would like the program to remember your login ID and password, click on the **Remember Me & Password** check box. From this point forward, each time you access the product request facility, your login ID and password will be loaded automatically.

If you have used more than one set of login credentials to access the The Fund product request facility, you can then use the drop-down list to select the desired login ID.

- Click on the down arrow  next to the **ID** text box.



- Click on the desired login ID.
- If you want to delete a login ID, select it from the drop-down list and click on the  button or press **ALT + D**.
- Once you have entered or selected your login credentials, click  or press **ALT + O** to continue. The Fund's product request screen will be displayed.



Landtech The Fund Integration

The Fund ALWAYS DRIVEN

The Fund Agent Web Site  
Landtech Title Insurance and Endorsements

File: File Number: 20171018 Login ID: wsmpr\_usr

Property  
Property Type: Residential  
Address 1: 15780 73rd Street North  
Address 2:  
City: Loxahatchee State: FL Zip: 33470  
County: Palm Beach  
Legal Desc: Lot 3, Block 10, The Acreage, Palm Beach County, Florida

Lender  
Lender Name: Bank of America, NA  
Lender Address 1: 1500 Central Ave.  
Lender Address 2:  
City: Atlanta State: GA Zip: 30032  
Long Name:

Agent Information  
Name: Titles R Us Contact: Bob Smith  
Address 1: 1000 Main Street Address 2:  
City: Royal Palm Beach State: Florida Zip: 33411  
Email: bsmith@titlesrus.com Phone: 5615554322 Fax: 5615556844

CPL Products Jackets

Loan  
Loan Purpose: Purchase Closing Date: 3/15/2018 Sales Price: \$400,000.00  
Loan Number: M-2013849201 Loan Amount: \$350,000.00

CPL Branches  
Main Branch: Test Number(Do Not Mail Orlando 32862)  
Optional Branches:  
Available Optional Branches  
 Test Number(Do Not Mail Orlando 32862)  
 Test Number(Do Not Prepare Product Orlando 11111)  
 Dwana Abbott(The Fund Headquarters Do Not Prepare Product Miami 33016)  
 Test Number(Do Not Prepare Product Miami 33010)  
 Test Number(Do Not Prepare Product Orlando 32822)  
 Test Number(Do Not Prepare Product Tampa 33618)  
 Test Number(Do Not Prepare Product Ft Lauderdale 33309)  
Get CPL

Update CPL  
Active Reference Number: View CPLs

Borrower

Party Type	Last Name	First Name	Middle Name	Company Name	Long Name	Status
INDIVIDUAL	Johnson	Jake				
INDIVIDUAL	Johnson	Sara				his wife
INDIVIDUAL	Harper	Charles				
INDIVIDUAL	Harper	Jane				his wife

Seller

Party Type	Last Name	First Name	Middle Name	Company Name	Long Name	Status
INDIVIDUAL	Smith	James				
INDIVIDUAL	Smith	Nancy				his wife
INDIVIDUAL	Smith	Harry				a single man

Version: 1.0.0.1m View All Close

The information shown in the **Property**, **Lender**, **Agent Information**, **Borrower** and **Seller** sections is pulled automatically from the current open closing file.

There are two links in the upper right area of the screen provided for convenience. The first one is a direct link to the The Fund's web site. Therefore, you can click on the **The Fund Agent Web Site** link and go directly to the The Fund's web site from within **Landtech**.

The second link is a summary form of the title insurance and endorsement premiums that were entered in the closing file in **Landtech**. Clicking on the **Landtech Title Insurance and Endorsements** link will display the form shown below.

Landtech The Fund Integration - Title Insurance And Endorsements

landtech Version: 1.0.0.1

File  
File Number: 20171018      Login ID: wmp\_usr

Property  
Property Type: Residential  
Address 1: 15780 73rd Street North  
Address 2:  
City: Lovahatchee      State: FL      Zip: 33470  
County: Palm Beach  
Legal Desc: Lot 3, Block 10, The Acreage, Palm Beach County, Florida

Owner's Premium  
Effective Date: 3/15/2018  
Coverage: 350,000.00  
Total Premium: 2,075.00  
Agent Premium: 1,452.50  
Underwriter Premium: 622.50

Loan Premium  
Effective Date: 3/15/2018  
Coverage: 400,000.00  
Total Premium: 2,075.00  
Agent Premium: 1,452.50  
Underwriter Premium: 622.50

Endorsement Title	Premium	Underwriter Due	Net Premium

Lender  
Lender Name: Bank of America, NA  
Lender Address 1: 1500 Central Ave.  
Lender Address 2:  
City: Atlanta      State: GA      Zip: 30032  
Long Name: Bank of America, NA  
Lender Clause:

Loan  
Loan Purpose: Purchase      Closing Date: 3/15/2018      Sales Price: \$400,000.00  
Loan Number: M-2013849201      Loan Amount: \$350,000.00

Agent Information  
Name: Titles R Us      Contact:  
Address 1: 1000 Main Street      Address 2:  
City: Royal Palm Beach      State: Florida      Zip: 33411  
Email:      Phone:      Fax:

Borrower

Party Type	Last Name	First Name	Middle Name	Company Name	Long Name	Status
INDIVIDUAL	Johnson	Jake				
INDIVIDUAL	Johnson	Sara				his wife
INDIVIDUAL	Harper	Charles				
INDIVIDUAL	Harper	Jane				his wife

Seller

Party Type	Last Name	First Name	Middle Name	Company Name	Long Name	Status
INDIVIDUAL	Smith	James				
INDIVIDUAL	Smith	Nancy				his wife
INDIVIDUAL	Smith	Harry				a single man

Close

This can be used as a reference as you request Closing Protection Letters, title searches, title insurance policy jackets and commitments. The form is separate so with multiple monitors you may move it to another monitor so it remains open while you request title products.


**Note:** The product request and title insurance and endorsements screens are in Windows Presentation Foundation (WPF) format and are scalable. You can adjust the size of the screen to your liking and the size will be remembered on subsequent openings.

The Fund's underwriter service has multiple components. You can request Closing Protection Letters from the **CPL** screen. You can submit an order for an initial title search from the **Products** screen. And you can request title insurance policy jackets and commitments from the **Jackets** screen.

## Requesting a Closing Protection Letter

- The **CPL** screen is displayed initially upon accessing the integration. Therefore, there is no need to select it if you are going to request a CPL. However, if you are on a different screen, then click on the **CPL** tab to display the **CPL** screen.
- The **CPL** screen contains the options available for the CPL request.

CPL	Products	Jackets								
<b>Loan</b> Loan Purpose: <b>Purchase</b> Closing Date: <b>3/15/2018</b> Sales Price: <b>\$400,000.00</b> Loan Number: <b>M-2013849201</b> Loan Amount: <b>\$350,000.00</b>										
<b>CPL Branches</b> Main Branch: <b>Test Number(Do Not Mail Orlando 32862)</b>										
Optional Branches: <table border="1"> <thead> <tr> <th>Available Optional Branches</th> </tr> </thead> <tbody> <tr><td><input type="checkbox"/> Test Number(Do Not Mail Orlando 32862)</td></tr> <tr><td><input type="checkbox"/> Test Number(Do Not Prepare Product Orlando 11111)</td></tr> <tr><td><input type="checkbox"/> Dwana Abbott(The Fund Headquarters Do Not Prepare Product Miami 33016)</td></tr> <tr><td><input type="checkbox"/> Test Number(Do Not Prepare Product Miami 33010)</td></tr> <tr><td><input type="checkbox"/> Test Number(Do Not Prepare Product Orlando 32822)</td></tr> <tr><td><input type="checkbox"/> Test Number(Do Not Prepare Product Tampa 33618)</td></tr> <tr><td><input type="checkbox"/> Test Number(Do Not Prepare Product Ft Lauderdale 33309)</td></tr> </tbody> </table>			Available Optional Branches	<input type="checkbox"/> Test Number(Do Not Mail Orlando 32862)	<input type="checkbox"/> Test Number(Do Not Prepare Product Orlando 11111)	<input type="checkbox"/> Dwana Abbott(The Fund Headquarters Do Not Prepare Product Miami 33016)	<input type="checkbox"/> Test Number(Do Not Prepare Product Miami 33010)	<input type="checkbox"/> Test Number(Do Not Prepare Product Orlando 32822)	<input type="checkbox"/> Test Number(Do Not Prepare Product Tampa 33618)	<input type="checkbox"/> Test Number(Do Not Prepare Product Ft Lauderdale 33309)
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<input type="checkbox"/> Test Number(Do Not Prepare Product Ft Lauderdale 33309)										
Update CPL		Get CPL								
Active Reference Number:		View CPLs								

- The information in the **Loan** section is pulled from the current open closing file in **Landtech**.
- The **Main Branch** field should contain your main office location. However, if it does not and there are other selections for the main branch, click on the down-arrow  to display a list of offices.

CPL	Products	Jackets																	
<b>Loan</b> Loan Purpose: <b>Purchase</b> Closing Date: <b>3/15/2018</b> Sales Price: <b>\$400,000.00</b> Loan Number: <b>M-2013849201</b> Loan Amount: <b>\$350,000.00</b>																			
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Test Number Ao&E Billing(Do Not Prepare Product Palm Beach 11111)																			
Test Number Ao&E Billing(Do Not Prepare Product Sarasota 11111)																			
Test Number Ao&E Billing(Do Not Prepare Product Milton 11111)																			
Test Number Ao&E Billing(Do Not Prepare Product Ft Lauderdale 11111)																			
Pcap - Leon Branch(Do Not Prepare Product Tallahassee 11111)																			
Test Number(Do Not Prepare Product Orlando 32862)																			
Test Number(Do Not Prepare Product Orlando 32862)																			
Test Number(Do Not Prepare Product Orlando 32862)																			
Update CPL		Get CPL																	
Active Reference Number:		View CPLs																	

- Select the desired office by clicking on it.
- If there is a branch office that you would like included in the CPL request, check the check box next to the desired branch office in the **Optional Branches** list. More than one branch office can be selected.

CPL	Products	Jackets																
<b>Loan</b> Loan Purpose: <a href="#">Purchase</a> Closing Date: <a href="#">3/15/2018</a> Sales Price: <a href="#">\$400,000.00</a> Loan Number: <a href="#">M-2013849201</a> Loan Amount: <a href="#">\$350,000.00</a>																		
<b>CPL Branches</b> Main Branch: <a href="#">Test Number X(899920 Testing Number Orlando 32862)</a>																		
Optional Branches: <table border="1" style="width: 100%;"> <thead> <tr> <th colspan="2">Available Optional Branches</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>Pcap - Leon Branch(Do Not Prepare Product Tallahassee 11111)</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>Test Number(Do Not Prepare Product Orlando 32862)</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Test Number(Do Not Prepare Product Orlando 32862)</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Test Number(Do Not Prepare Product Orlando 32862)</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Test Number(Do Not Prepare Product Orlando 32862)</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>Test Number X(899920 Testing Number Orlando 32862)</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Test Number(Do Not Prepare Product Orlando 32862)</td> </tr> </tbody> </table>			Available Optional Branches		<input type="checkbox"/>	Pcap - Leon Branch(Do Not Prepare Product Tallahassee 11111)	<input checked="" type="checkbox"/>	Test Number(Do Not Prepare Product Orlando 32862)	<input type="checkbox"/>	Test Number(Do Not Prepare Product Orlando 32862)	<input type="checkbox"/>	Test Number(Do Not Prepare Product Orlando 32862)	<input type="checkbox"/>	Test Number(Do Not Prepare Product Orlando 32862)	<input checked="" type="checkbox"/>	Test Number X(899920 Testing Number Orlando 32862)	<input type="checkbox"/>	Test Number(Do Not Prepare Product Orlando 32862)
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<input type="checkbox"/>	Test Number(Do Not Prepare Product Orlando 32862)																	
<input type="button" value="Get CPL"/>																		
<b>Update CPL</b> Active Reference Number: <input type="button" value="View CPLs"/>																		

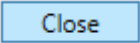
- Click on . The Closing Protection Letter will be displayed on your screen as well as downloaded in PDF format to the location on your computer specified in the **Digital Files Folder** section of the **Digital Files Access** setting under **Settings**.
- A reference number will appear in the **Update CPL** section.

CPL	Products	Jackets																
<b>Loan</b> Loan Purpose: <b>Purchase</b> Closing Date: <b>3/15/2018</b> Sales Price: <b>\$400,000.00</b> Loan Number: <b>M-2013849201</b> Loan Amount: <b>\$350,000.00</b>																		
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<input checked="" type="checkbox"/>	Test Number X(899920 Testing Number Orlando 32862)																	
<input type="checkbox"/>	Test Number(Do Not Prepare Product Orlando 32862)																	
<input type="button" value="Get CPL"/>																		
<b>Update CPL</b> Active Reference Number: <b>1000315</b>																		
<input type="button" value="View CPLs"/>																		

- You can view the CPL at any time by clicking on the  button. The **CPL History** dialog box will be displayed.

Landtech The Fund Integration: CPL History			
Action	Reference #	Status	Created Date
<a href="#">View</a>	1000315	Active	2/21/2018 10:24:11 AM

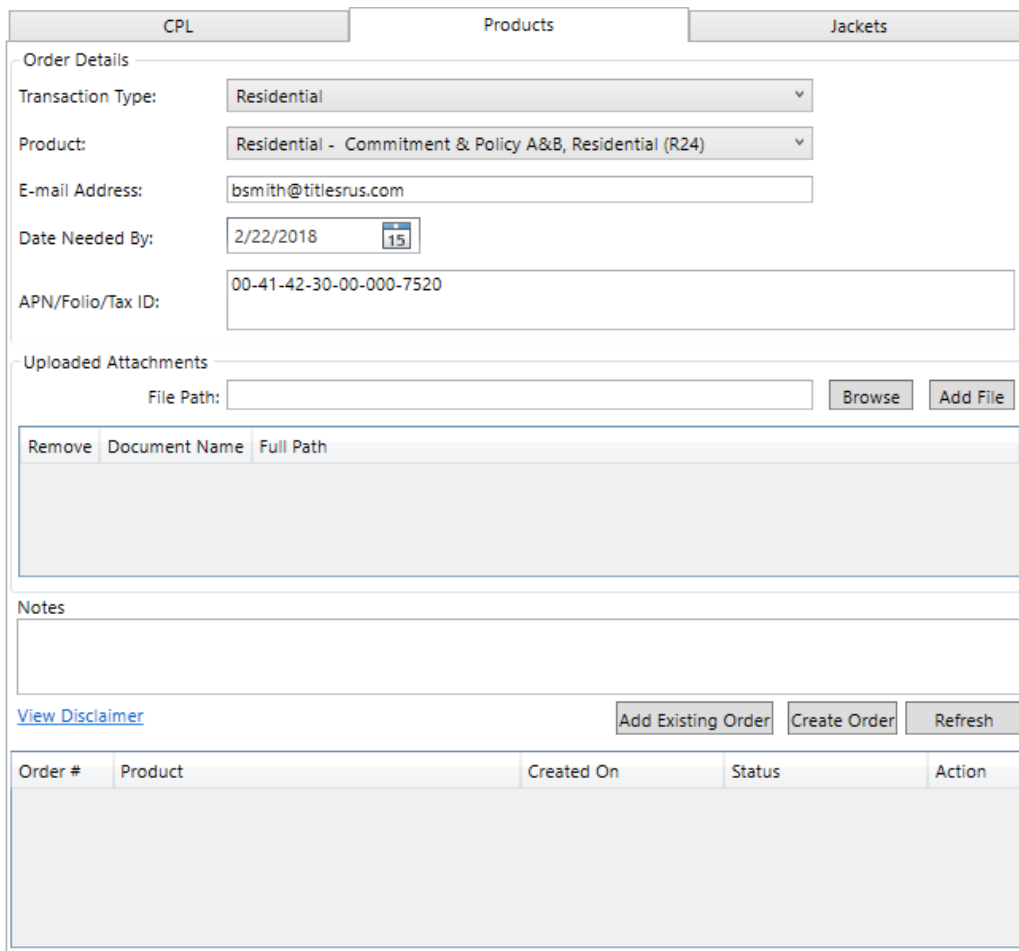
- The **CPL History** dialog box will list the current active CPL and any CPLs that may have been voided. Voided CPLs will have a status of **Inactive**.
- You can view the CPL by clicking on the **View** link.

- Click  to close the *CPL History* dialog box.

## Products

*Products* enables you to request a title search and receive initial title information for the transaction such as the legal description, exceptions and requirements.

- Click on the *Products* tab to display the *Products* screen. Here you will find the options available for submitting a title search order.




The screenshot shows the 'Products' tab selected. The form includes the following fields and controls:

- Transaction Type:** Residential (dropdown menu)
- Product:** Residential - Commitment & Policy A&B, Residential (R24) (dropdown menu)
- E-mail Address:** bsmith@titlesrus.com (text input)
- Date Needed By:** 2/22/2018 (calendar picker)
- APN/Folio/Tax ID:** 00-41-42-30-00-000-7520 (text input)
- Uploaded Attachments:** File Path: [ ] with 'Browse' and 'Add File' buttons.
- Table:**

Remove	Document Name	Full Path
- Notes:** [ ]
- Buttons:** View Disclaimer, Add Existing Order, Create Order, Refresh
- Table:**

Order #	Product	Created On	Status	Action

- To begin, select the type of transaction from the *Transaction Type* drop-down list. Click on the down-arrow  for the *Transaction Type* field to display the list of transaction types. Click on the desired transaction type to select it.

CPL	Products	Jackets		
<b>Order Details</b>				
Transaction Type:	Residential			
Product:	<div style="border: 1px solid black; padding: 2px;">           Residential            Commercial         </div>			
E-mail Address:	bsmith@titlesrus.com			
Date Needed By:	2/22/2018 <input type="button" value="15"/>			
APN/Folio/Tax ID:	00-41-42-30-00-000-7520			
<b>Uploaded Attachments</b>				
File Path:	<input type="text"/>	<input type="button" value="Browse"/> <input type="button" value="Add File"/>		
Remove	Document Name	Full Path		
<b>Notes</b>				
<a href="#">View Disclaimer</a>	<input type="button" value="Add Existing Order"/>	<input type="button" value="Create Order"/> <input type="button" value="Refresh"/>		
<b>Order #</b>	<b>Product</b>	<b>Created On</b>	<b>Status</b>	<b>Action</b>

- Select the type of search that you would like to order from the **Product** drop-down list. Click on the down-arrow  for the **Product** field to display the list of search products. Click on the desired search product to select it.

CPL	Products	Jackets
<b>Order Details</b>		
Transaction Type:	Residential	
Product:	Residential - Commitment & Policy A&B, Residential (R24)	
E-mail Address:	Residential - Commitment & Policy A&B, Residential (R24)	
Date Needed By:	2/22/2018 15	
APN/Folio/Tax ID:	00-41-42-30-00-000-7520	
<b>Uploaded Attachments</b>		
File Path:	<input type="text"/>	<input type="button" value="Browse"/> <input type="button" value="Add File"/>
<input type="button" value="Remove"/>	Document Name	Full Path
Notes		
<input type="text"/>		
<a href="#">View Disclaimer</a>	<input type="button" value="Add Existing Order"/>	<input type="button" value="Create Order"/> <input type="button" value="Refresh"/>
<b>Order #</b>	<b>Product</b>	<b>Created On</b> <b>Status</b> <b>Action</b>
<input type="text"/>		

**Note:** The search products will change based on the selection made for the transaction type.

The **E-mail Address** field contains the email address of a contact at your company that is to receive notifications and updates about the title search order. It will default to the email address for the contact in the **Settlement Agent** section on page 5 of the Closing Disclosure. However, if there is no contact information entered there, the email address for the **Closer/Processor** that was selected in the closing file will be used. If there is no contact information and no closer/processor selected, then the email address will default to the email address for the title company selected in the closing file. If no email address is available from any of these sources, the **E-mail Address** field will be blank.

- If there is no email address in the **E-mail Address** field, click in the **E-mail Address** field and enter an email address that you want notifications to go to. Only one email address is permitted.

**Note:** An email address is required. You will not be able to submit the order without one.

- If the email address showing in the **E-mail Address** field is not the correct email address, you can change it. Click in the **E-mail Address** field and enter the desired email address.



- The **Date Needed By** field defaults to the current day's date. The date can be changed if necessary. Click in the **Date Needed By** field and enter the date that you need to have the search results. You can also click on the calendar **15** icon and select the date from the pop-up calendar.

The screenshot shows a web application interface with three tabs: 'CPL', 'Products', and 'Jackets'. The 'Products' tab is active. The 'Order Details' section contains the following fields:

- Transaction Type: Residential
- Product: Residential - Commitment & Policy A&B, Residential (R24)
- E-mail Address: bsmith@titlesrus.com
- Date Needed By: 2/22/2018 (with a calendar icon)
- APN/Folio/Tax ID: (empty field)

The 'Uploaded Attachments' section includes a 'File Path:' field, a 'Browse' button, and an 'Add File' button. A calendar pop-up is displayed over the 'Date Needed By' field, showing 'February 2018' with the date '22' selected.

Below the attachments section is a 'Notes' field. At the bottom of the form are buttons for 'View Disclaimer', 'Add Existing Order', 'Create Order', and 'Refresh'.

Order #	Product	Created On	Status	Action

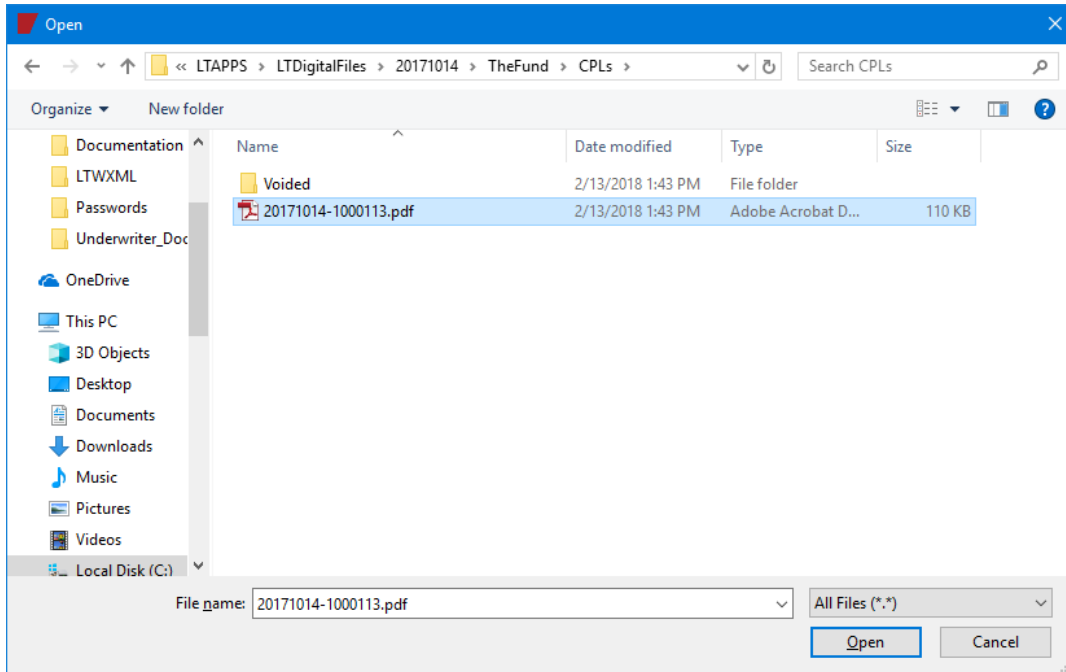
The **APN/Folio/Tax ID** field shows the Tax Parcel ID or Property Tax ID that was entered in the **Tax Parcel or Folio ID** field in the current open closing file. This information can be modified if necessary. If the property ID was not entered in the closing file, it can be entered here.

- If you need to add or change the property tax ID, click in the **APN/Folio/Tax ID** field and enter the desired property tax ID.

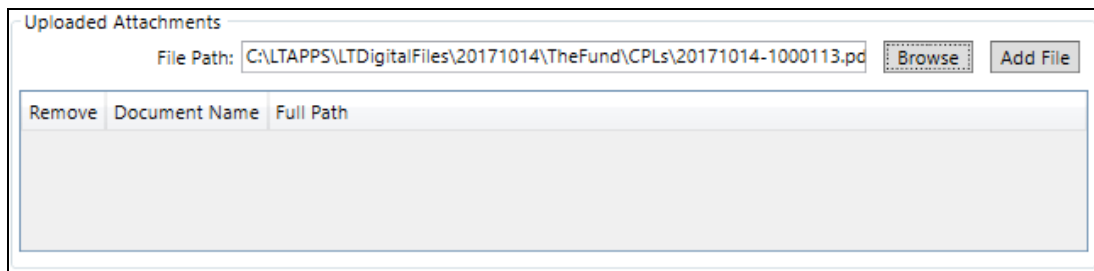
CPL	Products	Jackets		
<b>Order Details</b>				
Transaction Type:	Residential			
Product:	Residential - Commitment & Policy A&B, Residential (R24)			
E-mail Address:	bsmith@titlesrus.com			
Date Needed By:	3/1/2018			
APN/Folio/Tax ID:	00-41-42-30-00-000-7520			
<b>Uploaded Attachments</b>				
File Path:	<input type="text"/>	<input type="button" value="Browse"/> <input type="button" value="Add File"/>		
Remove	Document Name	Full Path		
<b>Notes</b>				
<input type="text"/>				
<a href="#">View Disclaimer</a>	<input type="button" value="Add Existing Order"/>	<input type="button" value="Create Order"/> <input type="button" value="Refresh"/>		
Order #	Product	Created On	Status	Action

If you need to include a document or documents as supporting information with your order, you can add them in the **Uploaded Attachments** section.

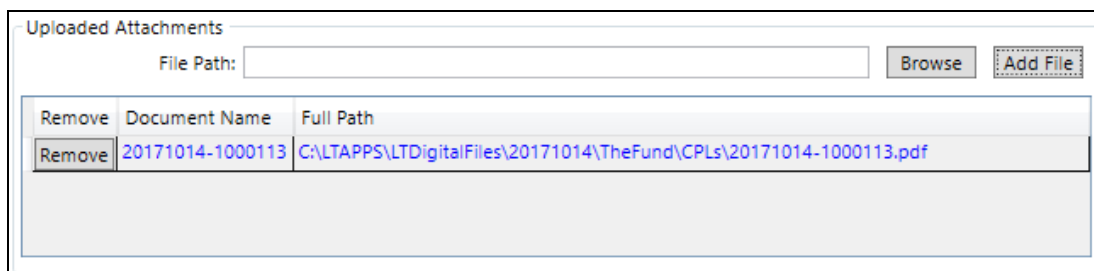
- Click  to attach a document. The **Open** dialog box will be displayed.



- Navigate to the desired location and select the document that you want to include.
- Click  to select the document. You will see the path to the document's location listed in the **File Path** field.



- Click  to add the document to the **Uploaded Attachments** list.



- If for some reason you no longer want to submit this document, you can remove it by clicking . It will no longer show in the documents list.

CPL      Products      Jackets

**Order Details**

Transaction Type: Residential

Product: Residential - Commitment & Policy A&B, Residential (R24)

E-mail Address: bsmith@titlesrus.com

Date Needed By: 3/1/2018

APN/Folio/Tax ID: 00-41-42-30-00-000-7520

**Uploaded Attachments**

File Path:

Remove	Document Name	Full Path
<input type="button" value="Remove"/>	20171014-1000113	C:\LTAPPS\LTDigitalFiles\20171014\TheFund\CPLs\20171014-1000113.pdf

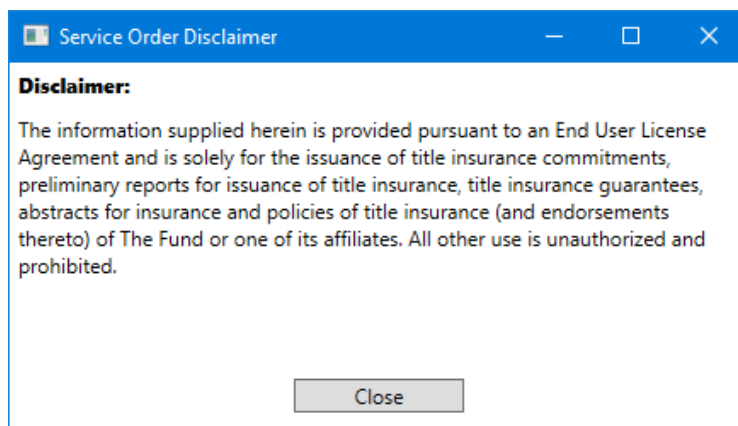
**Notes**

Please contact our office if you have any questions.

[View Disclaimer](#)     

Order #	Product	Created On	Status	Action
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- If you need to provide any additional information or special instructions for the order, click in the *Notes* field and enter the necessary information.
- If you click the *View Disclaimer* link, you will see the following disclaimer.



- Click  to close the disclaimer message.

- When you are ready to submit the order, click [Create Order](#). The order will be submitted and will appear in the order list.

CPL
Products
Jackets

**Order Details**

Transaction Type:

Product:

E-mail Address:

Date Needed By:

APN/Folio/Tax ID:

**Uploaded Attachments**

File Path:

Remove	Document Name	Full Path

**Notes**

Please contact our office if you have any questions.

[View Disclaimer](#)

Order #	Product	Created On	Status	Action
4264	20171018: Residential Commitment & Policy A&E	2/23/2018 10:38:12 AM	Processing	<a href="#">Import</a>

- The **Status** column will display the current status of the order. If you want to get an update on the status of your order, you can click [Refresh](#). If there has been a change to the status of your order, it will be reflected in the **Status** column.

Once an order has been processed and completed, you will receive an email notification that the order is ready for import.

- To retrieve the title search information, open the desired closing file in **Landtech** and then access The Fund integration by selecting the **The Fund Product Request** from the **Services** menu bar item as described previously.
- Click on the **Products** tab. You will see that the status of the order has been updated to **Ready for Import**. At this point, you can import the results into your **Landtech** closing file.

- Click the **Import** link in the **Action** column. You will see the results of the search order displayed.

Name	Search Results Value	Landtech Value	<input type="checkbox"/>
<b>Order</b>			
EffectiveDate	12/28/2017	03/15/2018	<input type="checkbox"/>
EffectiveTime	11:00:00 PM	12:00:00 AM	<input type="checkbox"/>
<b>Property</b>			
LegalDescription	Connecticut, shown on Parcel A on a map entitled "Property of	Lot 3, Block 10, The Acreage, Palm Beach County, Florida	<input type="checkbox"/>

There are three tabs containing all of the information that can be imported into **Landtech**.

The **Basic Information** tab consists of basic data for the order. The **Search Results Value** column contains the information returned from The Fund as a result of the search. The **Landtech Value** column shows what is currently in the closing file. Fields highlighted in orange indicate that the information returned from the search differs from the information contained in the current open closing file.

- If you want to import the information from the search results for a particular field into **Landtech**, click on the check box in the last column for that field. The information from the search will be imported and will overwrite the information in the **Landtech** closing file for that field.
- If you do not want to import the information from the search for a particular field, leave the check box for that field blank and that information will not be imported. The information already in the closing file will be retained.
- If you want to select all of the information from the search, click on the check box at the top of the last column and all items will be selected.

Name	Search Results Value	Landtech Value	
<b>Order</b>			
EffectiveDate	12/28/2017	03/15/2018	<input checked="" type="checkbox"/>
EffectiveTime	11:00:00 PM	12:00:00 AM	<input checked="" type="checkbox"/>
<b>Property</b>			
LegalDescription	Connecticut, shown on Parcel A on a map entitled 'Property of	Lot 3, Block 10, The Acreage, Palm Beach County, Florida	<input checked="" type="checkbox"/>

- Once you have selected the information that you want to import, click on the **Requirements Information** tab or the **Save & Continue** button to proceed to the requirements screen.

The **Requirements Information** screen contains all of the requirements that can be imported into the **Requirements** section of the **Landtech** closing file.

The ***Search Results Requirements*** section contains the requirements that were returned by The Fund as a result of the title search.

The ***Landtech Requirements*** section contains requirements that were entered into the current open ***Landtech*** closing file. This section will most likely be blank. However, if requirements were added to the closing file prior to executing this import function, they will be shown here.

The ***Requirements to Import*** section is where the requirements that you select for import will be displayed. These will be the requirements that will be imported into the ***Requirements*** section of the ***Landtech*** closing file.

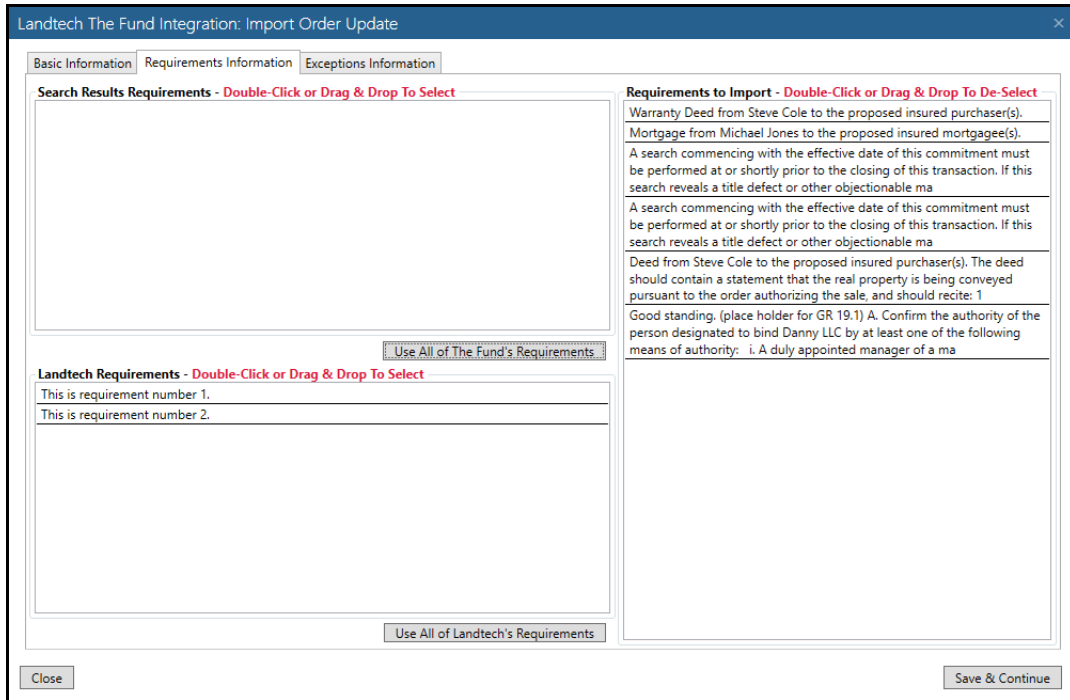
- If you want to import all of the requirements in the ***Search Results Requirements*** section, click on the **Use All of The Fund's Requirements** button. All of the requirements will be moved to the ***Requirements to Import*** section.
- If you want to only select certain requirements, you can either double-click on the requirement or you can drag it over to the ***Requirements to Import*** section and drop it there. Continue doing this until you have selected all of the requirements that you want.
- You can select multiple requirements by holding down the **CTRL** key or the **Shift** key while clicking on the desired requirements. You can then drag them all at once to the ***Requirements to Import*** section.

If requirements had been entered in the closing file, they will be listed in the ***Landtech Requirements*** section. If you want to keep those requirements, you will need to select them. Otherwise, they will be overwritten when the requirements listed in the ***Requirements to Import*** section are imported. Therefore, they would need to be included in the requirements that are imported to retain them.

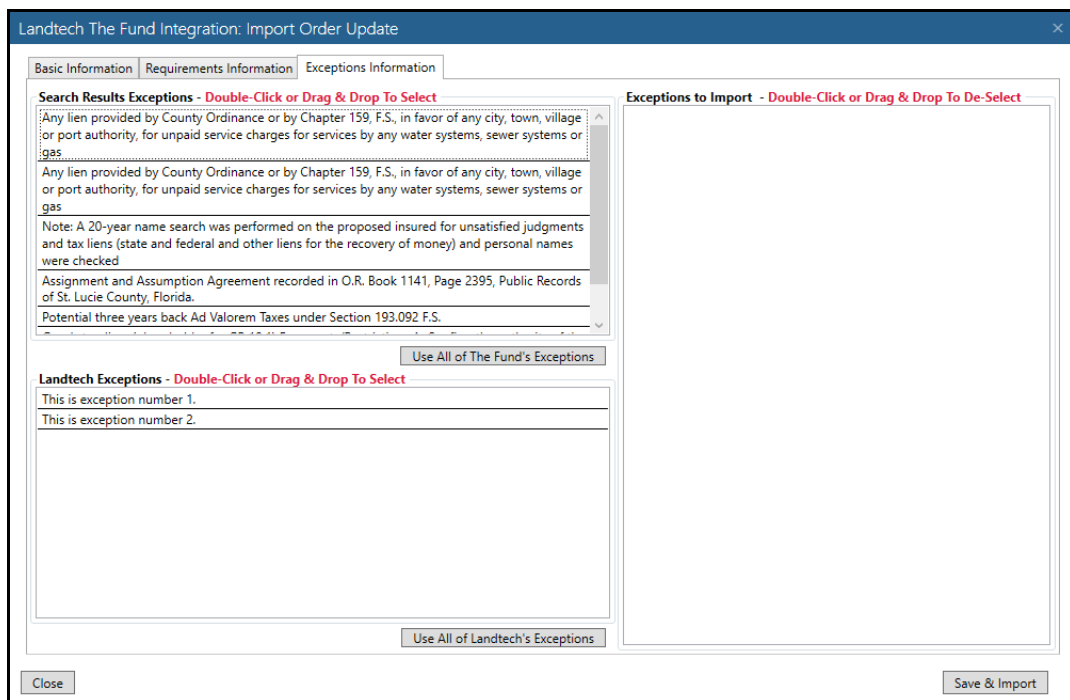
- If you want to include the ***Landtech*** requirements in the import, you can select them all by clicking on the **Use All of Landtech's Requirements** button.
- If you want to only select certain ***Landtech*** requirements, you can either double-click on the requirement or you can drag it over to the ***Requirements to Import*** section and drop it there. Continue doing this until you have selected all of the requirements that you want.
- You can select multiple requirements by holding down the **CTRL** key or the **Shift** key while clicking on the desired requirements. You can then drag them all at once to the ***Requirements to Import*** section.
- You can rearrange the order of the requirements in the ***Requirements to Import*** section if desired or necessary by clicking and dragging the requirement to the desired position in the list.



- If you want to remove a requirement from the **Requirements to Import** section, you can either double-click on it or you can drag it back to the section that it originated from and drop it there.



- When you have finished selecting requirements, click on the **Exceptions Information** tab or the **Save & Continue** button to proceed to the exceptions screen.



The *Search Results Exceptions* section contains the exceptions that were returned by The Fund as a result of the title search.

The *Landtech Exceptions* section contains exceptions that were entered into the current open *Landtech* closing file. This section will most likely be blank. However, if exceptions were added to the closing file prior to executing this import function, they will be shown here.

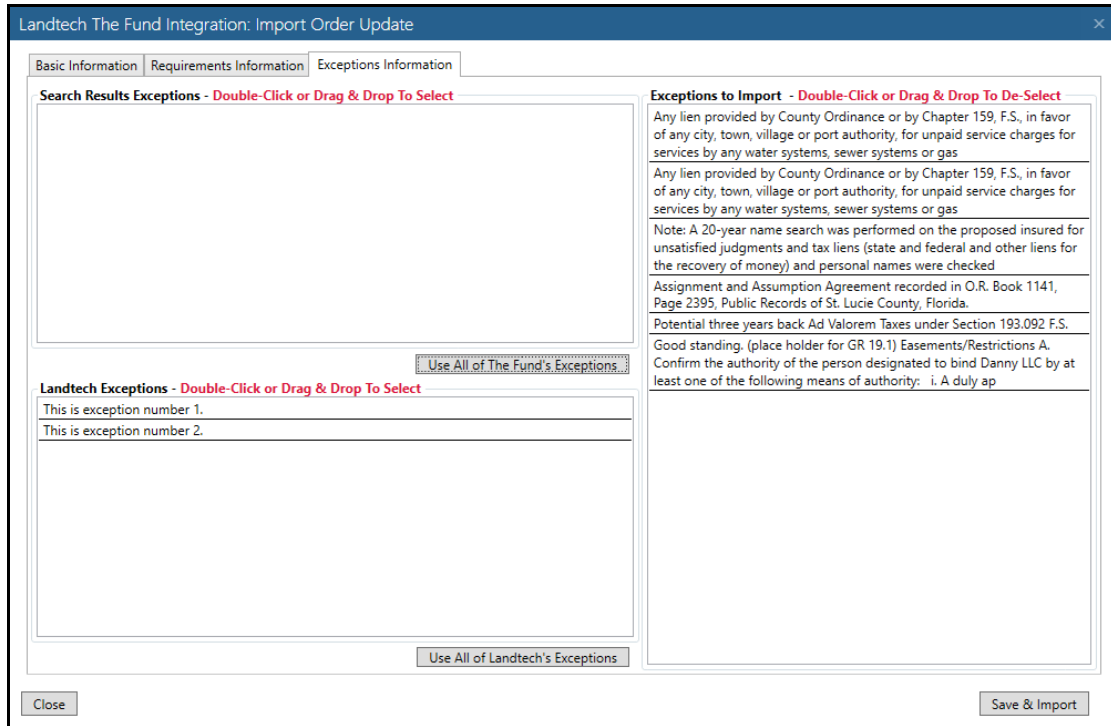
The *Exceptions to Import* section is where the exceptions that you select will be displayed. These will be the exceptions that will be imported into the *Exceptions* section of the *Landtech* closing file.

- If you want to import all of the exceptions in the *Search Results Exceptions* section, click on the [Use All of The Fund's Exceptions](#) button. All of the exceptions will be moved to the *Exceptions to Import* section.
- If you want to only select certain exceptions, you can either double-click on the exception or you can drag it over to the *Exceptions to Import* section and drop it there. Continue doing this until you have selected all of the exceptions that you want.
- You can select multiple exceptions by holding down the **CTRL** key or the **Shift** key while clicking on the desired exceptions. You can then drag them all at once to the *Exceptions to Import* section.

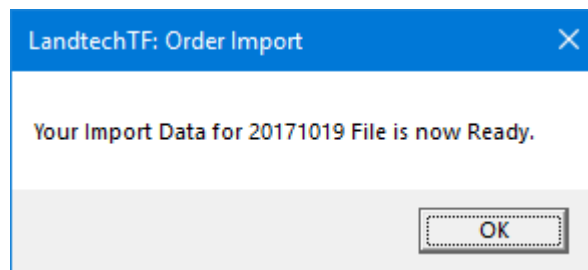
If exceptions had been entered in the closing file, they will be listed in the *Landtech Exceptions* section. If you want to keep those exceptions, you will need to select them. Otherwise, they will be overwritten when the exceptions listed in the *Exceptions to Import* section are imported. Therefore, they would need to be included in the exceptions that are imported to retain them.

- If you want to include the *Landtech Exceptions* in the import, you can select them all by clicking on the [Use All of Landtech's Exceptions](#) button.
- If you want to only select certain *Landtech* exceptions, you can either double-click on the exception or you can drag it over to the *Exceptions to Import* section and drop it there. Continue doing this until you have selected all of the exceptions that you want.
- You can select multiple exceptions by holding down the **CTRL** key or the **Shift** key while clicking on the desired exceptions. You can then drag them all at once to the *Exceptions to Import* section.
- You can rearrange the order of the exceptions in the *Exceptions to Import* section if desired or necessary by clicking and dragging the exception to the desired position in the list.

- If you want to remove an exception from the **Exceptions to Import** section, you can either double-click on it or you can drag it back to the section that it originated from and drop it there.



- When you have finished selecting exceptions, click the **Save & Import** button to continue. You will see the following message.



- Click **OK** to continue. You will be returned to the **Products** screen. Notice that the status now shows as **Imported**.

CPL	Products	Jackets		
Order Details				
Transaction Type:	Residential			
Product:	Residential - Commitment & Policy A&B, Residential (R24)			
E-mail Address:	steve@titlesrus.com			
Date Needed By:	2/28/2018			
APN/Folio/Tax ID:	00-41-42-30-00-000-7520			
Uploaded Attachments				
File Path:	<input type="text"/>	<input type="button" value="Browse"/> <input type="button" value="Add File"/>		
Remove	Document Name	Full Path		
Notes				
<input type="text"/>				
<a href="#">View Disclaimer</a>	<input type="button" value="Add Existing Order"/>	<input type="button" value="Create Order"/> <input type="button" value="Refresh"/>		
Order #	Product	Created On	Status	Action
4178	20171019: Externally Generated Package Map	2/23/2018 2:00:36 PM	Imported	<a href="#">Import</a>

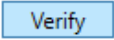

- When you save the current open closing file in **Landtech**, all of the information that you selected for import will be imported into the closing file.
- Notice that the **Import** link in the **Action** column is still active. If for some reason you need to import the information again, you can do so by clicking on the **Import** link and repeating the process.

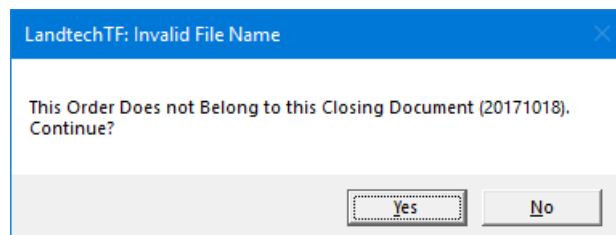
## Adding an Existing Order

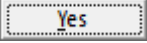
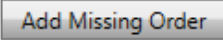
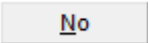
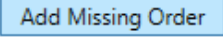
If you have requested a title search through The Fund's web site for a particular file and you would like to have that order added to the integration, you can do so using the **Add Existing Order** feature.

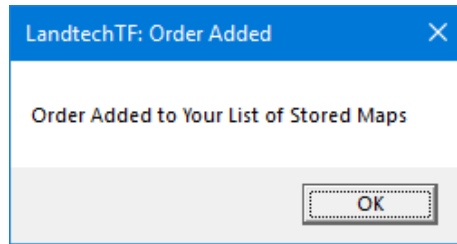
- To add an existing order, click on the **Add Existing Order** button. The **Add Missing Product** dialog box will be displayed.

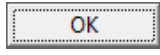
To add an existing order, you will need to know the order number or ID. To get this information you will need to log in to The Fund’s web site and locate the order that you want to add. Note the order number associated with or assigned to the order.

- Enter the order number in the **Order ID** field.
- The order must be verified to insure that it is a valid order. To do so, click the  button.
- If the order is a valid order, the  button will become active.
- If you attempt to add an existing order that is not associated with the closing file that you are working in, you will see the following message alerting you to that fact.



- If you would still like to add the existing order, click  or press **Y**. The  button will become active.
- If you do not want to add this existing order, click  or press **N**.
- Click  to add the existing order. You will see a confirmation that the order has been added.



- Click . The order will now be listed on the *Products* screen.

## Requesting Policy Jackets/Commitments

The *Jackets* screen enables you to request and receive title policy jackets and commitments.



To request a policy jacket or commitment:

- Click on the *Jackets* tab. The *Jackets* screen will be displayed. There you will see the options available for requesting a policy jacket or commitment.

A screenshot of the "Jackets" tab in a software application. The interface has three tabs: "CPL", "Products", and "Jackets", with "Jackets" being the active tab. The "Loan" section displays: Loan Purpose: Purchase, Closing Date: 3/15/2018, Sales Price: \$400,000.00, Loan Number: M-2013849201, and Loan Amount: \$350,000.00. The "Jacket Options" section includes: Policy Types: Commitment (dropdown), Branch Address: DO NOT PREPARE PRODUCT MIAMI 33010 (dropdown), Name of Insured: Jake Johnson, Sara Johnson, Charles Harper, Jane Harper, and Effective Date: 3/15/2018 (calendar). Below this is a table for "Active Policies" with columns for Type, Reference #, and Created Date. At the bottom right, there are two buttons: "View Policies" and "Get Jacket".

- The information in the *Loan* section is pulled from the current open closing file in *Landtech*.
- In the *Jacket Options* section, begin by selecting the policy type.

CPL	Products	Jackets												
<b>Loan</b>														
Loan Purpose: Purchase	Closing Date: 3/15/2018	Sales Price: \$400,000.00												
Loan Number: M-2013849201	Loan Amount: \$350,000.00													
<b>Jacket Options</b>														
Policy Types:	Commitment													
Branch Address:	Commitment													
Name of Insured:	06 - Owner Policy													
Effective Date:	06 - Mortgagee Short Form													
Active Policies:	<table border="1"> <thead> <tr> <th>Type</th> <th>Reference #</th> <th>Created Date</th> </tr> </thead> <tbody> <tr><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td></tr> </tbody> </table>		Type	Reference #	Created Date									
Type	Reference #	Created Date												
View Policies		Get Jacket												

- Click on the down-arrow  to display the **Policy Types** list. Click on the desired policy type to select it. You can request a commitment, a mortgagee policy or an owner's policy.
- The **Branch Address** field should contain your office location. However, if it does not and there are other selections for your office, you can select a different location. Click on the down-arrow  for the **Branch Address** field to display the list of office locations. Click on the desired office location to select it.

CPL	Products	Jackets
<b>Loan</b>		
Loan Purpose: Purchase	Closing Date: 3/15/2018	Sales Price: \$400,000.00
Loan Number: M-2013849201	Loan Amount: \$350,000.00	
<b>Jacket Options</b>		
Policy Types:	06 - Owner Policy	
Branch Address:	DO NOT PREPARE PRODUCT MIAMI 33010	
Name of Insured:	DO NOT PREPARE PRODUCT MIAMI 33010	
Effective Date:	DO NOT PREPARE PRODUCT PALM BEACH 11111	
Active Policies:	DO NOT PREPARE PRODUCT MILTON 11111	
	DO NOT PREPARE PRODUCT ORLANDO 32862	
	DO NOT PREPARE PRODUCT ORLANDO 32862	
	DO NOT PREPARE PRODUCT ORLANDO 32822	
	DO NOT PREPARE PRODUCT ORLANDO 32822	
	DO NOT PREPARE PRODUCT ORLANDO 32822	
	DO NOT PREPARE PRODUCT ORLANDO 32862	
	DO NOT PREPARE PRODUCT ORLANDO 32862	
	DO NOT PREPARE PRODUCT ORLANDO 32862	
	DO NOT PREPARE PRODUCT ORLANDO 32862	
	DO NOT PREPARE PRODUCT ORLANDO 32862	
	DO NOT PREPARE PRODUCT ORLANDO 32862	
	DO NOT PREPARE PRODUCT FT LAUDERDALE 33301	
	DO NOT PREPARE PRODUCT MIAMI 11111	
	DO NOT PREPARE PRODUCT FT LAUDERDALE 11111	
	DO NOT PREPARE PRODUCT ORLANDO 32862	
	DO NOT PREPARE PRODUCT ORLANDO 32822	
	DO NOT PREPARE PRODUCT FT LAUDERDALE 33301	

Get Jacket

- The **Name of Insured** field shows the insured party or parties. This information is pulled from the current open closing file in **Landtech**. The insured parties will change automatically based on the selection for policy type.
- The **Effective Date** field fills automatically with the closing or settlement date that was entered in the closing file. The date can be changed if necessary.
- To change the effective date, click in the **Effective Date** field and enter the desired date. You can also click on the calendar **15** icon and select the date from the pop-up calendar.

The screenshot displays a software interface with three tabs: CPL, Products, and Jackets. The 'Loan' section shows: Loan Purpose: Purchase, Closing Date: 3/15/2018, Sales Price: \$400,000.00, Loan Number: M-2013849201, and Loan Amount: \$350,000.00. The 'Jacket Options' section includes: Policy Types: 06 - Owner Policy, Branch Address: 899920 TESTING NUMBER ORLANDO 32862, Name of Insured: Jake Johnson, Sara Johnson, Charles Harper, Jane Harper, Effective Date: 3/15/2018 (with a calendar icon), and Active Policies: (with a table icon). A calendar pop-up for March 2018 is open, showing the 15th selected. At the bottom right are 'View Policies' and 'Get Jacket' buttons.

- Once you have selected the jacket type and specified all required information, click on the **Get Jacket** button. The policy jacket or commitment will be displayed on your screen as well as downloaded in PDF format to the location on your system specified in the **Digital Files Folder** section of the **Digital Files Access** setting under **Settings**.
- All policy jackets and/or commitments that have been requested will be shown in the **Active Policies** list.



CPL	Products	Jackets												
Loan														
Loan Purpose: <a href="#">Purchase</a>	Closing Date: <a href="#">3/15/2018</a>	Sales Price: <a href="#">\$400,000.00</a>												
Loan Number: <a href="#">M-2013849201</a>	Loan Amount: <a href="#">\$350,000.00</a>													
Jacket Options														
Policy Types:	<a href="#">Commitment</a> ▼													
Branch Address:	<a href="#">899920 TESTING NUMBER ORLANDO 32862</a> ▼													
Name of Insured:	<a href="#">Jake Johnson, Sara Johnson, Charles Harper, Jane Harper</a>													
Effective Date:	<a href="#">3/15/2018</a> <input type="text" value="15"/>													
Active Policies:	<table border="1"> <thead> <tr> <th>Type</th> <th>Reference #</th> <th>Created Date</th> </tr> </thead> <tbody> <tr> <td><a href="#">OwnersPolicy</a></td> <td><a href="#">902132</a></td> <td><a href="#">2/20/2018 2:27:31 PM</a></td> </tr> <tr> <td><a href="#">MortgagePolicy</a></td> <td><a href="#">903168</a></td> <td><a href="#">2/20/2018 2:27:47 PM</a></td> </tr> <tr> <td><a href="#">Commitment</a></td> <td><a href="#">8100209</a></td> <td><a href="#">2/20/2018 2:27:57 PM</a></td> </tr> </tbody> </table>		Type	Reference #	Created Date	<a href="#">OwnersPolicy</a>	<a href="#">902132</a>	<a href="#">2/20/2018 2:27:31 PM</a>	<a href="#">MortgagePolicy</a>	<a href="#">903168</a>	<a href="#">2/20/2018 2:27:47 PM</a>	<a href="#">Commitment</a>	<a href="#">8100209</a>	<a href="#">2/20/2018 2:27:57 PM</a>
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<a href="#">Commitment</a>	<a href="#">8100209</a>	<a href="#">2/20/2018 2:27:57 PM</a>												
<a href="#">View Policies</a>		<a href="#">Get Jacket</a>												

- You can view the policy jackets and commitments by clicking the [View Policies](#) button. The **Policy Jacket History** dialog box will be displayed.


Landtech The Fund Integration: Policy Jacket History

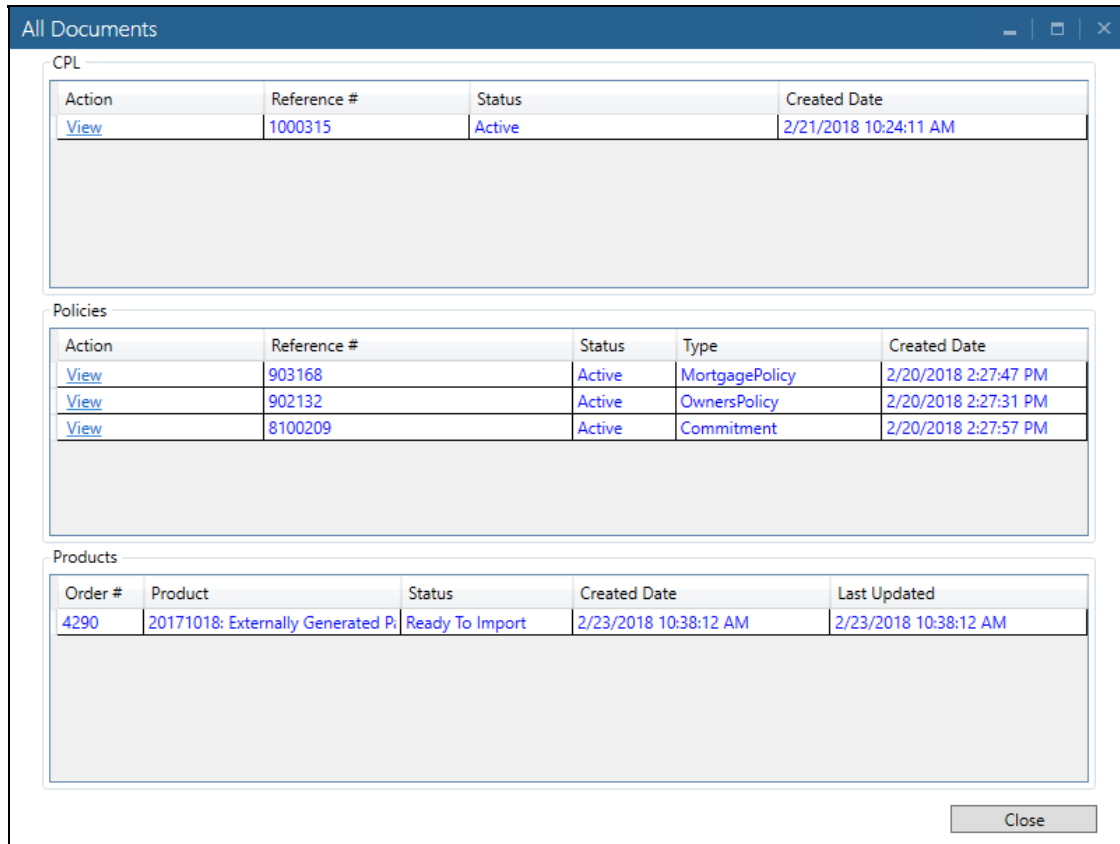
Action	Type	Reference #	Status	Created Date
<a href="#">View</a>	<a href="#">Commitment</a>	<a href="#">8100209</a>	<a href="#">Active</a>	<a href="#">2/20/2018 2:27:57 PM</a>
<a href="#">View</a>	<a href="#">MortgagePolicy</a>	<a href="#">903168</a>	<a href="#">Active</a>	<a href="#">2/20/2018 2:27:47 PM</a>
<a href="#">View</a>	<a href="#">OwnersPolicy</a>	<a href="#">902132</a>	<a href="#">Active</a>	<a href="#">2/20/2018 2:27:31 PM</a>

[Close](#)

- To view a particular policy or commitment, click on the **View** link next to that policy or commitment.
- Click [Close](#) to close the **Policy Jacket History** dialog box.

The policy number or numbers and commitment number generated by the jacket request will automatically be imported into the **Policy #** and **Commitment #** fields on the **Title Insurance** dialog box in **Landtech** for both the owner's and lender's policies.

- You can view all of the title products that you have requested at once by clicking on the  button. The **All Documents** dialog box will be displayed.



The screenshot shows a window titled "All Documents" with three sections:

**CPL**

Action	Reference #	Status	Created Date
<a href="#">View</a>	1000315	Active	2/21/2018 10:24:11 AM

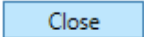
**Policies**

Action	Reference #	Status	Type	Created Date
<a href="#">View</a>	903168	Active	MortgagePolicy	2/20/2018 2:27:47 PM
<a href="#">View</a>	902132	Active	OwnersPolicy	2/20/2018 2:27:31 PM
<a href="#">View</a>	8100209	Active	Commitment	2/20/2018 2:27:57 PM

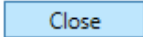
**Products**

Order #	Product	Status	Created Date	Last Updated
4290	20171018: Externally Generated P	Ready To Import	2/23/2018 10:38:12 AM	2/23/2018 10:38:12 AM

A "Close" button is located at the bottom right of the dialog box.

- The title products that you have requested and received will be listed by category.
- You can view a CPL, policy jacket or commitment by clicking on the **View** link in the **Action** column for the document that you want to view.
- Click  to close the **All Documents** dialog box.

## Closing The Fund Product Request

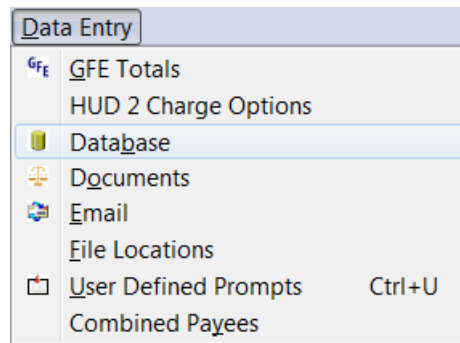
- When you have finished your product requests, click  to close the product request screen.

## Lender Information

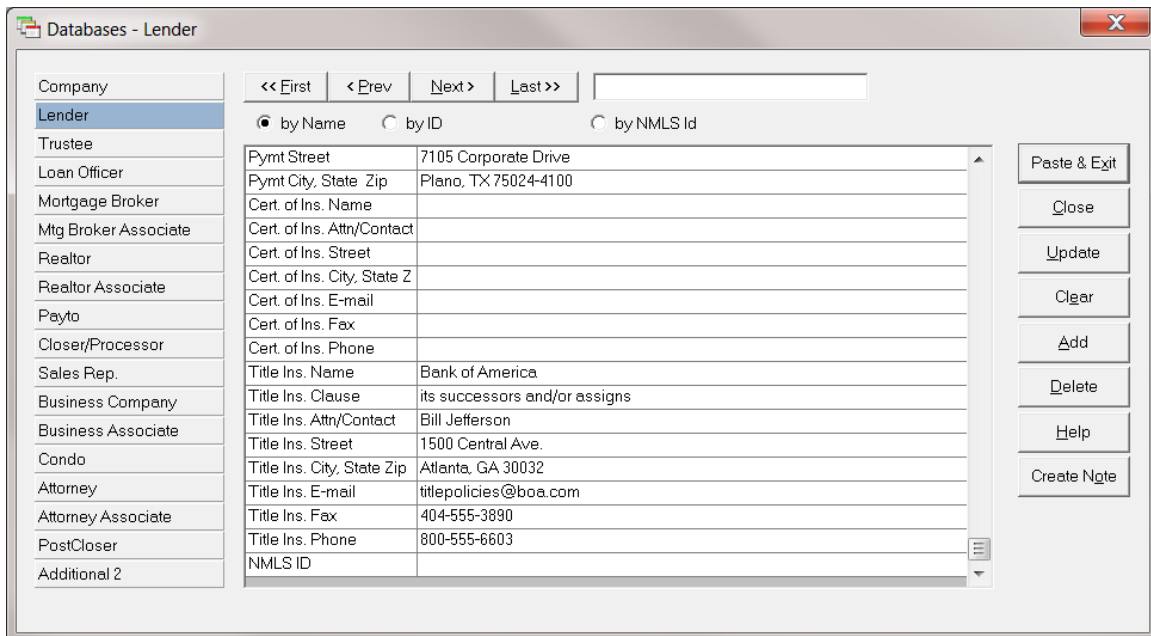
Normally the lender information is used to populate the **Lender** section of the product request screen. However, if you need a different entity in that section, such as a different office or location in the lender's organization, you can use the **Title Insurance** fields in the **Lender** database to provide the name and address of that entity.


To do so:

- Click on **Data Entry** on the menu bar or press **ALT + D**. The **Data Entry** drop-down menu will be displayed.



- Click on **Database** or press **B**. The **Databases** dialog box will be displayed.
- Click on the **Lender** button to display the **Lender** database. Scroll down to the fields labeled **Title Ins. Name**, **Title Ins. Clause**, **Title Ins. Attn/Contact**, **Title Ins. Street**, and **Title Ins. City, State Zip**, **Title Ins. E-mail**, **Title Ins. Fax**, and **Title Ins. Phone**.



- Enter the information for the desired entity in the appropriate fields and click  or press **ALT + U** to save the changes.

You will need to do this for each lender that needs an alternate entity for the product requests.

With these fields initialized, the **Lender** dialog box will display a check box labeled **Use Title Insurance Address for Product Request**. It will be checked by default. This will cause the **Lender** section of the product request screen to populate with the alternate entity.

If for some reason you do not want the alternate entity for the product request in a particular closing file, you can always uncheck this check box and the lender information will be used instead.

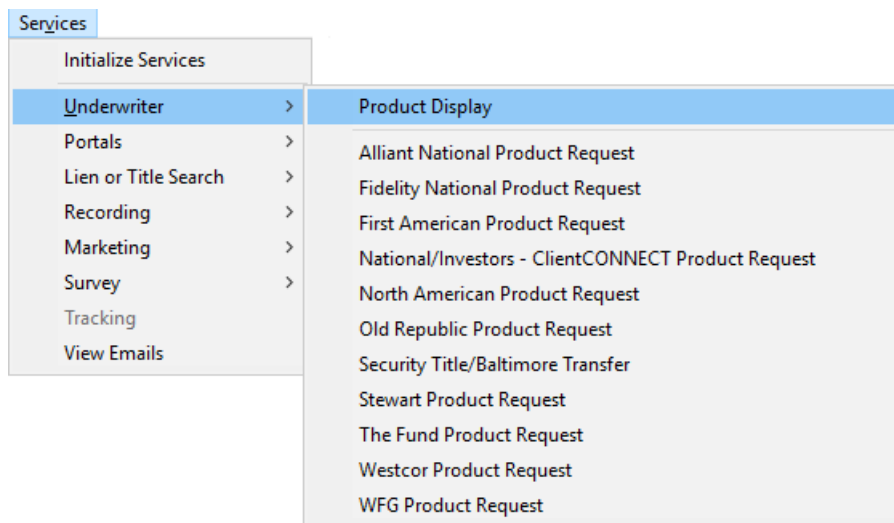
If you have entered a long name for the lender, the **Use Long Name for Product Request** check box will automatically be checked. This will cause the long name to be used in the product request. If you do not want to use the long name in the product request, uncheck the **Use Long Name for Product Request** check box.

## Product Display

*Product Display* enables you to view Closing Protection Letters, title insurance policy jackets and commitments downloaded through *The Fund Product Request* facility.

To view downloaded title products:

- Click on *Services* on the menu bar or press **ALT + V**. The *Services* drop-down menu is displayed.
- Position the mouse pointer on *Underwriter* or press **U**. The *Underwriter* menu will be displayed.



- Click on *Product Display*.
- A list of all title products downloaded for the current open closing file will be displayed.

File Name	Date
The Fund	
20171018-1000315-CPL.pdf	02/21/18 10:24:11 AM
20171018-8100209-Commitment.pdf	02/20/18 02:27:57 PM
20171018-902132-OwnersPolicy.pdf	02/20/18 02:27:31 PM
20171018-903168-MortgagePolicy.pdf	02/20/18 02:27:47 PM

- Click on the desired document and click . You can also double-click on the document. The document will open on your screen for viewing.

**Note:** *Product Display* will not be active if you are not in a closing file or if you have not initialized any of the underwriters available in the underwriter services in *Landtech*.