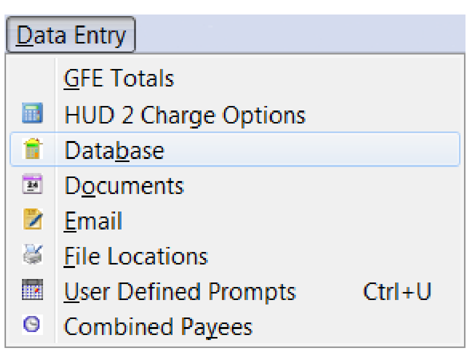
The Fund Underwriter Service

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.

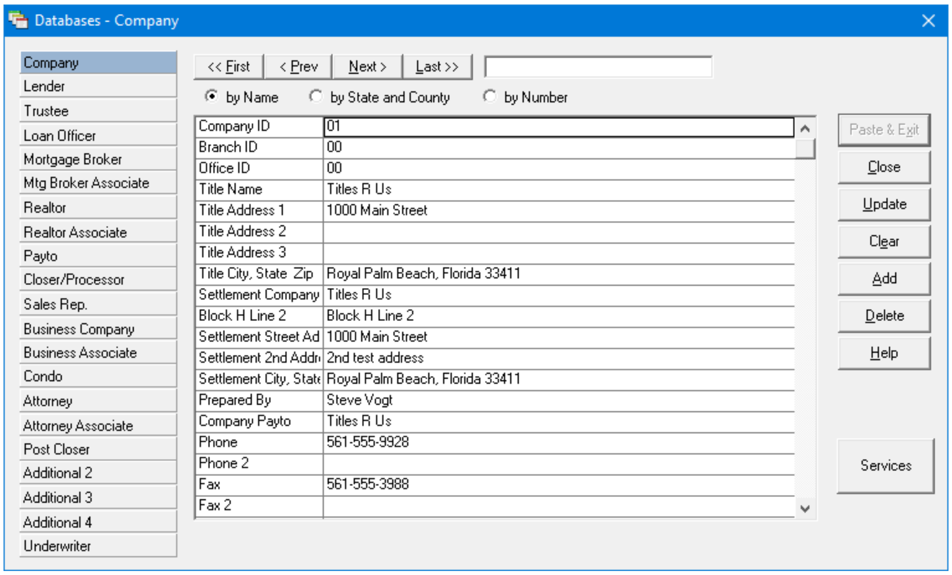
Initializing The Fund's Underwriter Service

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.



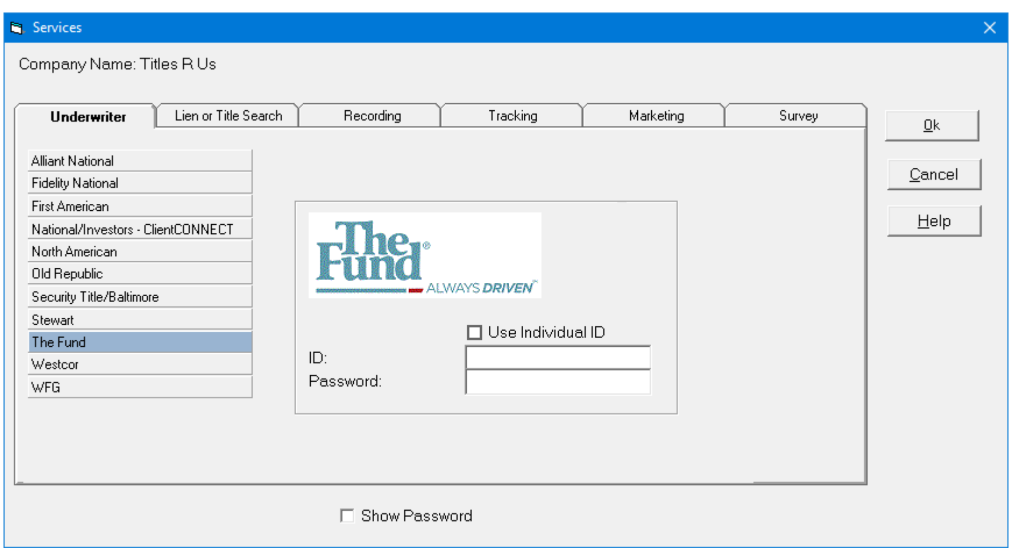
- Click on ***Database*** or press **B**. The ***Databases*** dialog box will be displayed with the ***Company*** database presented first.



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.

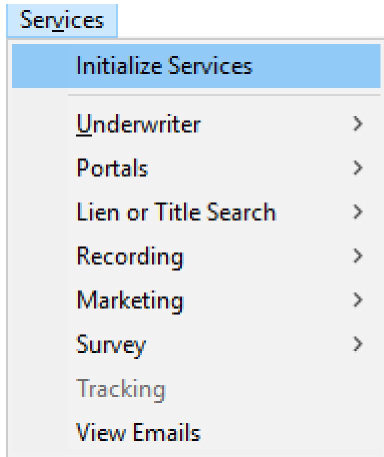
- Click Ok or press **ALT + O** to save the initialization and close the ***Services*** dialog box.

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.

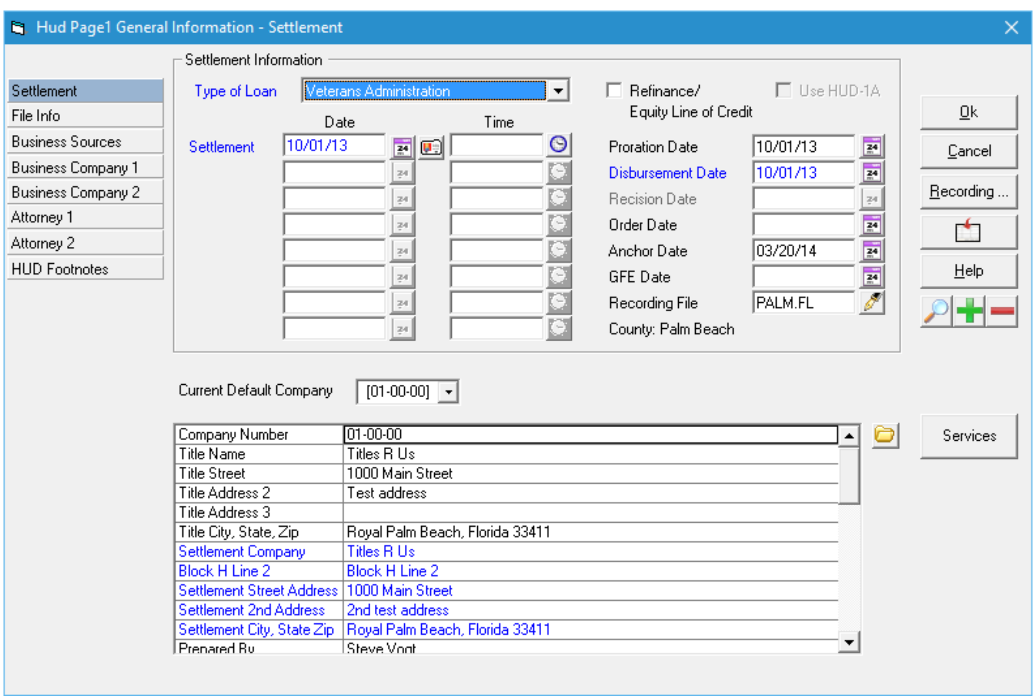
- Click on ***Services*** on the menu bar or press **ALT + V**. The ***Services*** drop-down menu will be displayed.

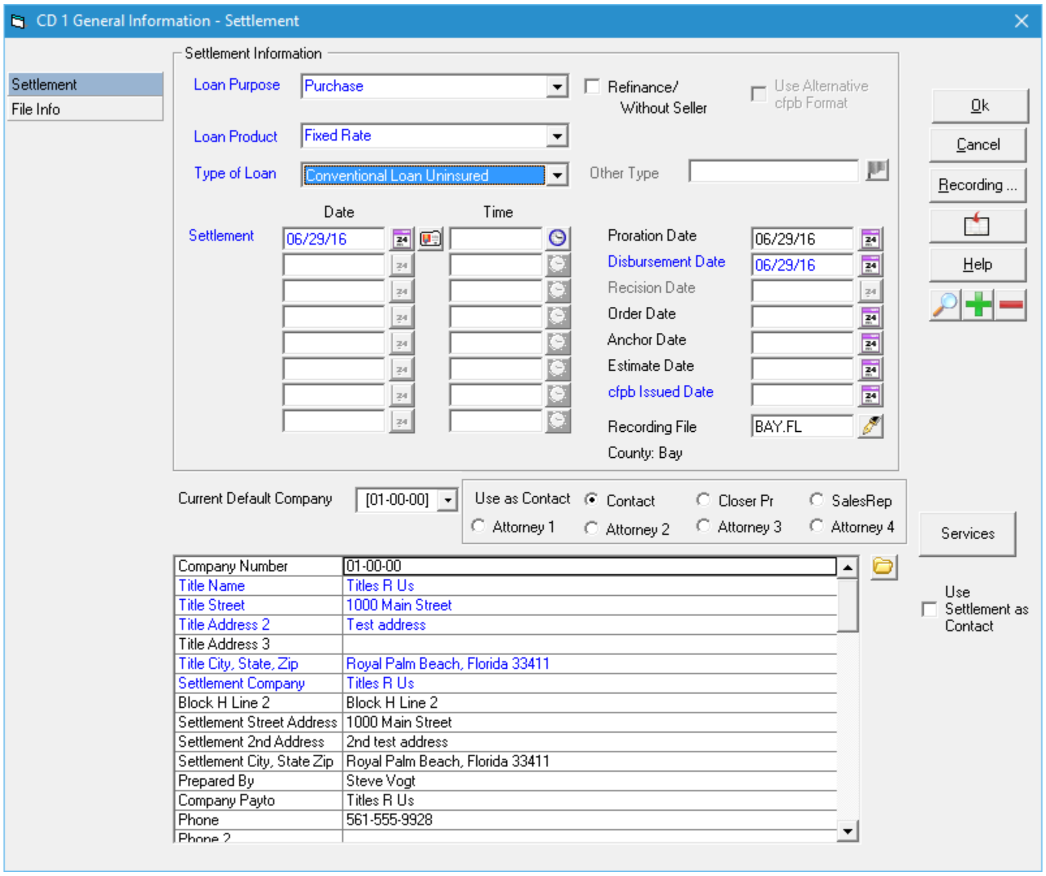


- Click on ***Initialize Services***. The ***Services*** dialog box will be displayed.

- You can also click on the ***Initialize Services*** toolbar button  to access the ***Services*** dialog box.

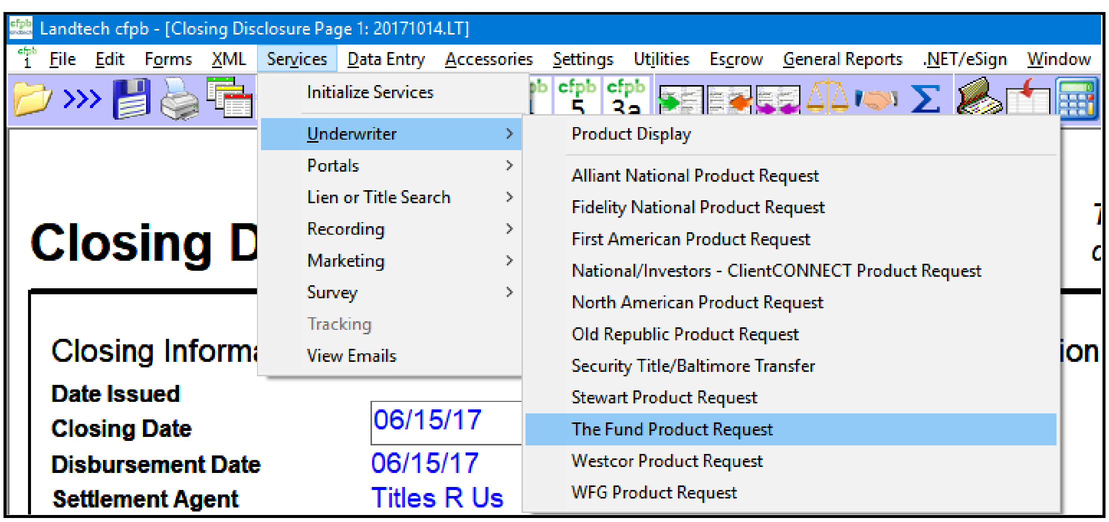
- And finally, there is a button labeled ***Services*** on the ***Settlement*** screen of the ***HUD Page 1 General Information*** dialog box in ***Landtech XML*** and the ***Settlement*** screen of the ***CD 1 General Information*** dialog box in ***Landtech cfpb*** that will enable you to gain access 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***.



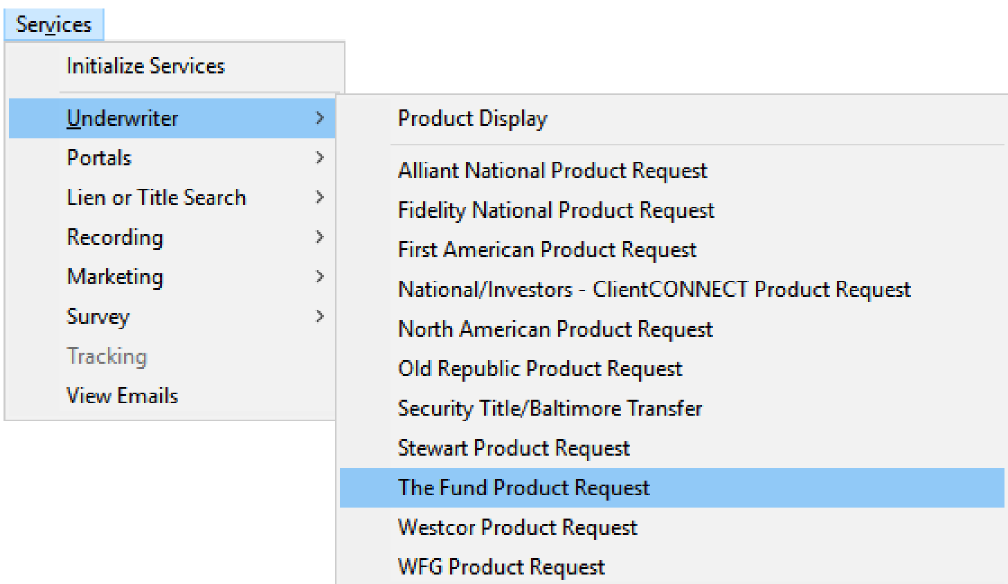
The Fund Product Request

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:

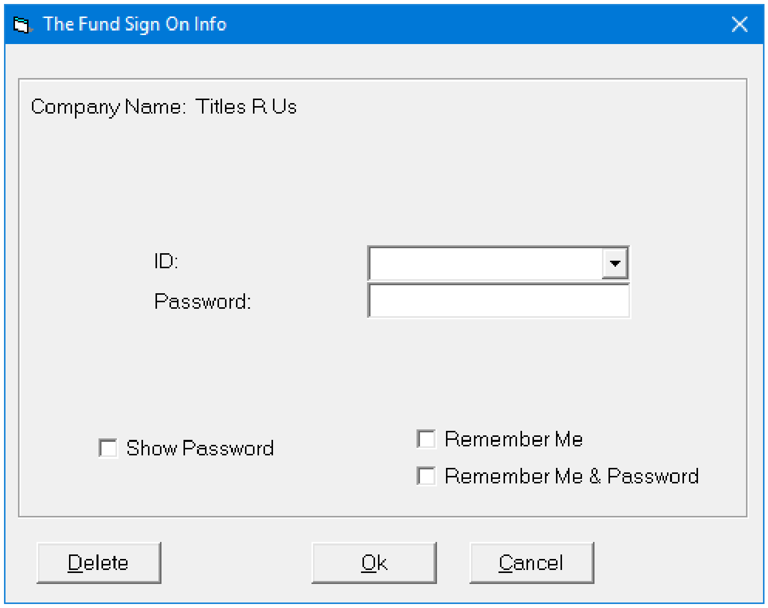
- Click on ***Services*** on the menu bar or press **ALT** + **V**. The ***Services*** drop-down menu is displayed.

- 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.

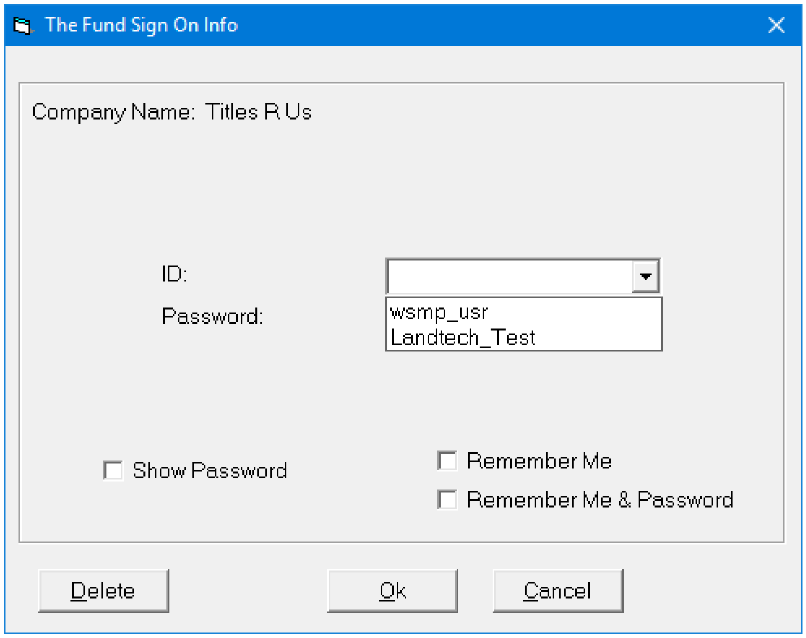
Note: The ***Show Password*** check box will only be available the first time you enter your login credentials. Once you save the credentials, you will no longer have the option to see your password.

- 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.

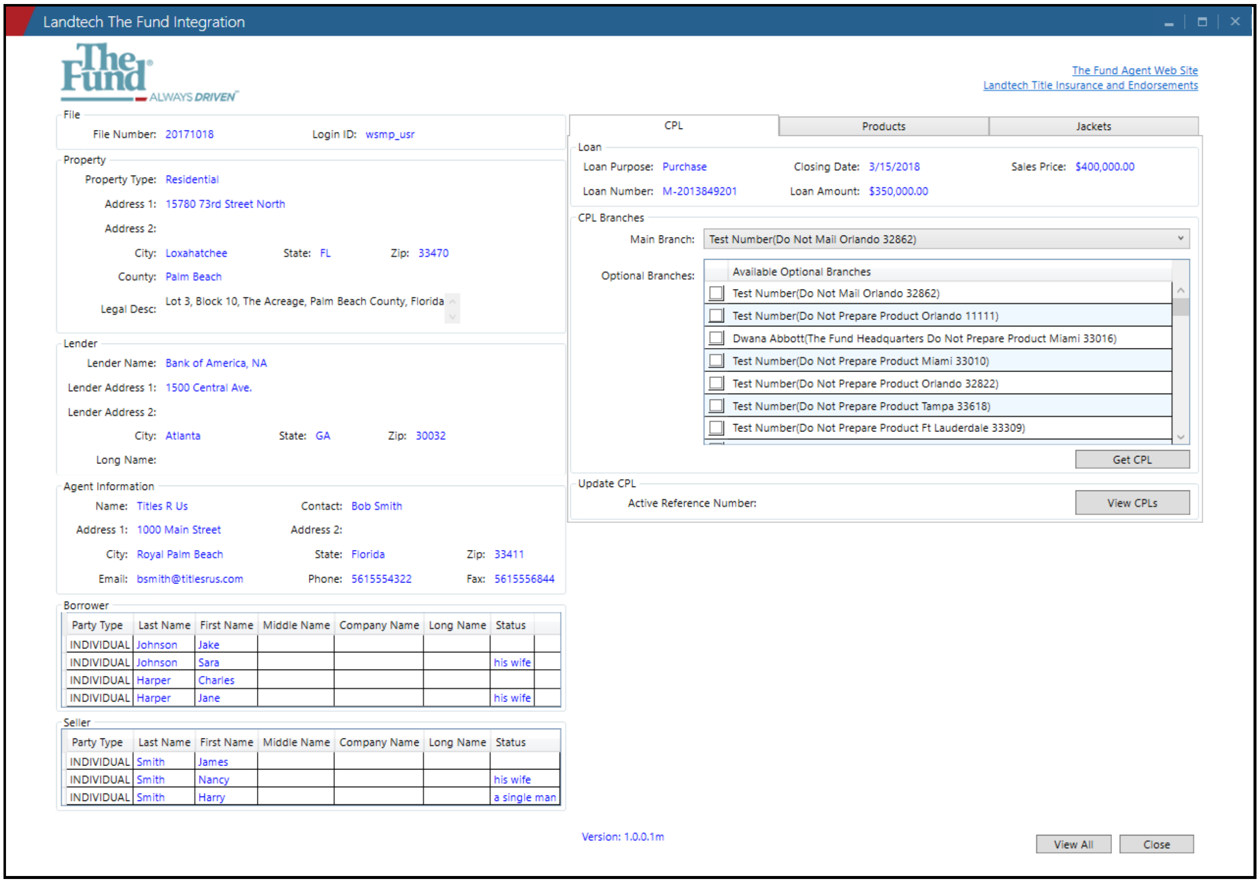
- If you would like the program to remember your login ID and password, click on the ***Remember Me & Password*** check box. From this point forward, each time you access the product request facility, your login ID and password will be loaded automatically.

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.



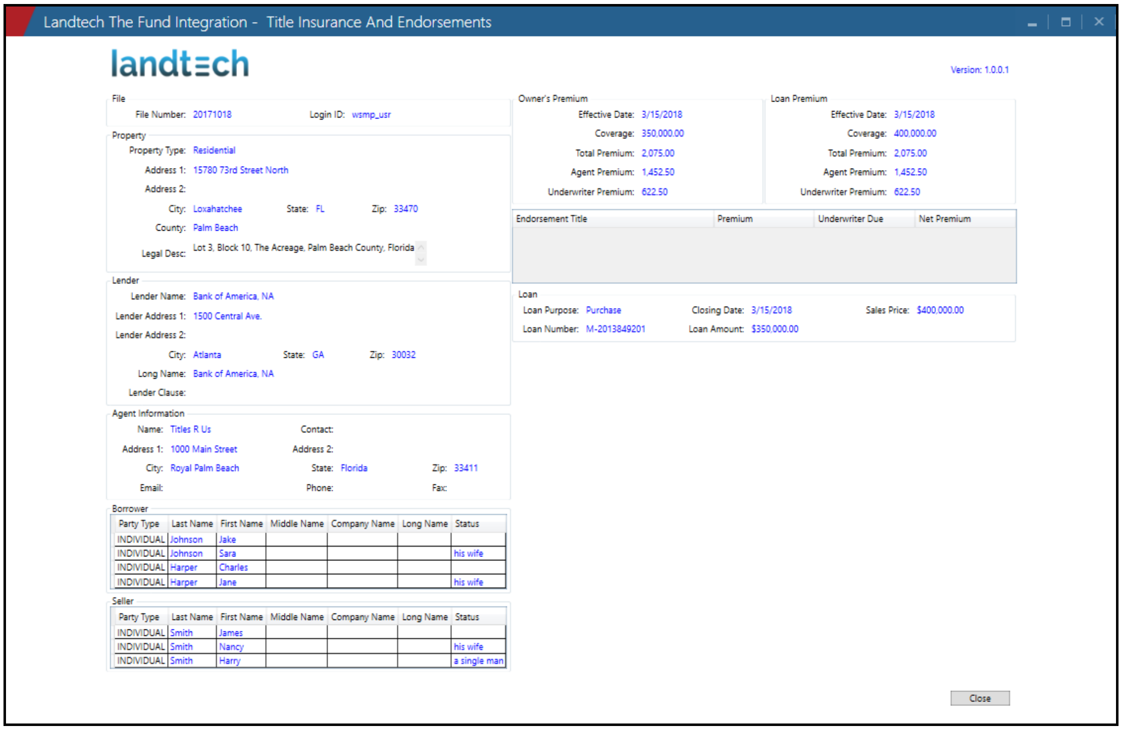
- Click on the desired login ID.
- If you want to delete a login ID, select it from the drop-down list and click on the Delete button or press **ALT** + **D**.
- Once you have entered or selected your login credentials, click Ok or press **ALT** + **O** to continue. The Fund's product request screen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



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.



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.

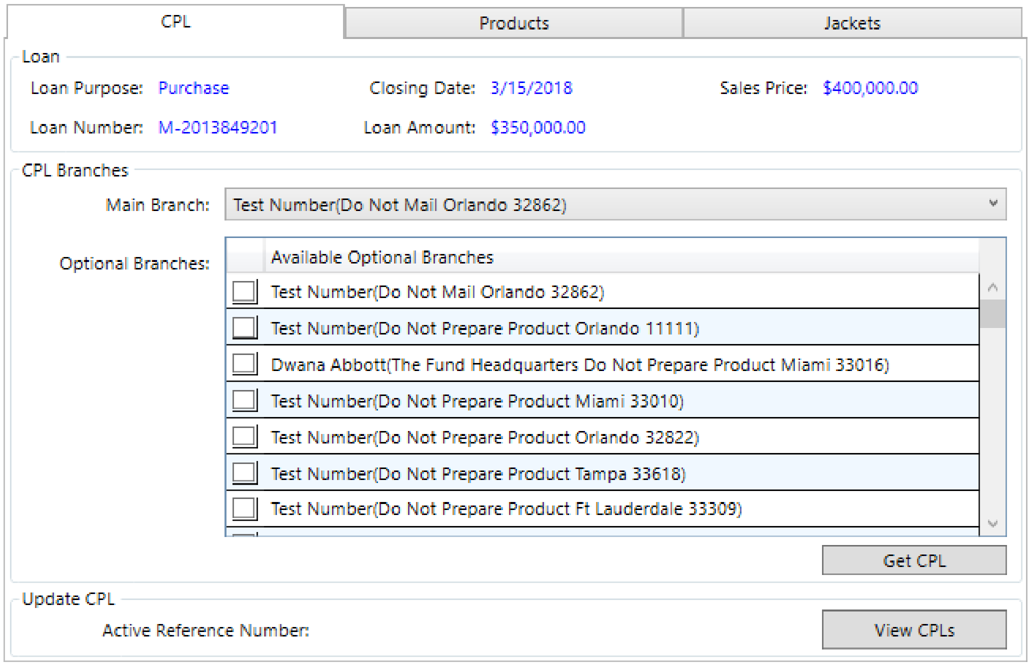
Note: The product request and title insurance and endorsements screens are in Windows Presentation Foundation (WPF) format and are scalable. You can adjust the size of the screen to your liking and the size will be remembered on subsequent openings.

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

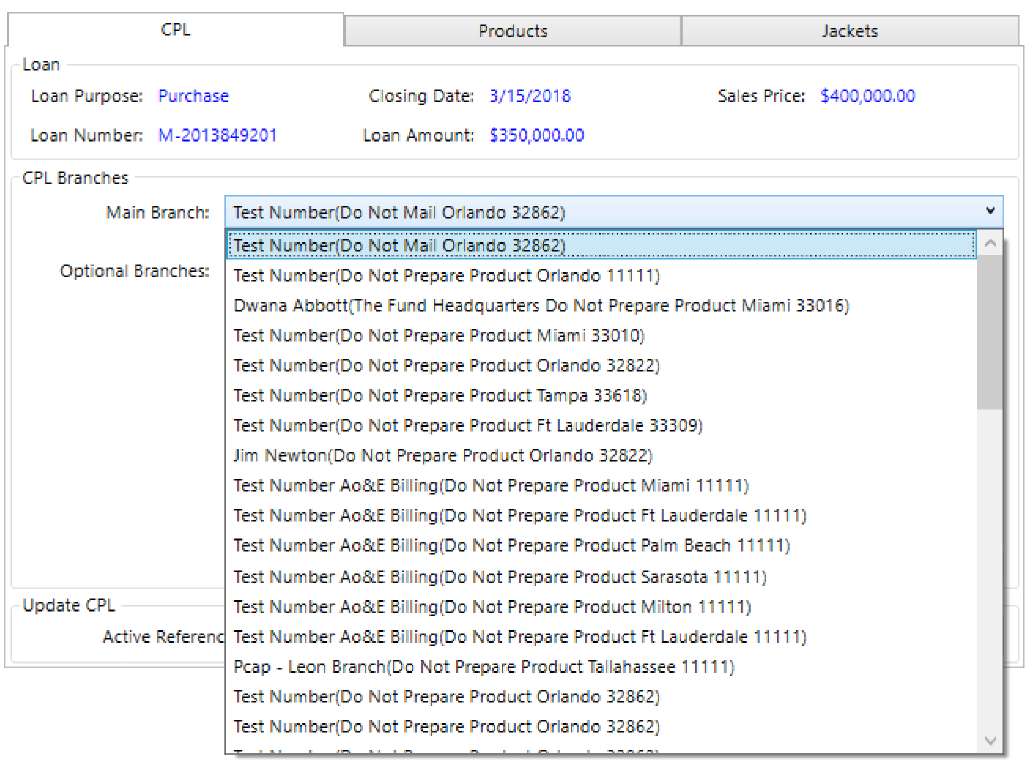
- The ***CPL*** screen is displayed initially upon accessing the integration. Therefore, there is no need to select it if you are going to request a CPL. However, if you are on a different screen, then click on the ***CPL*** tab to display the ***CPL*** screen.

- The ***CPL*** screen contains the options available for the CPL request.



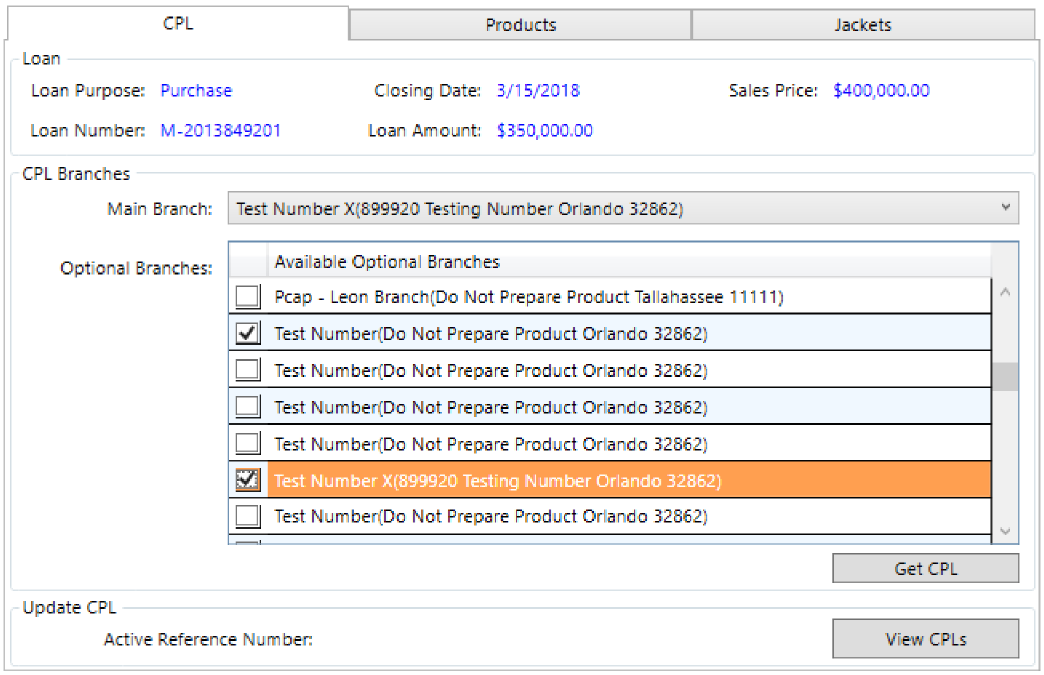
- The information in the ***Loan*** section is pulled from the current open closing file in ***Landtech***.

- 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.



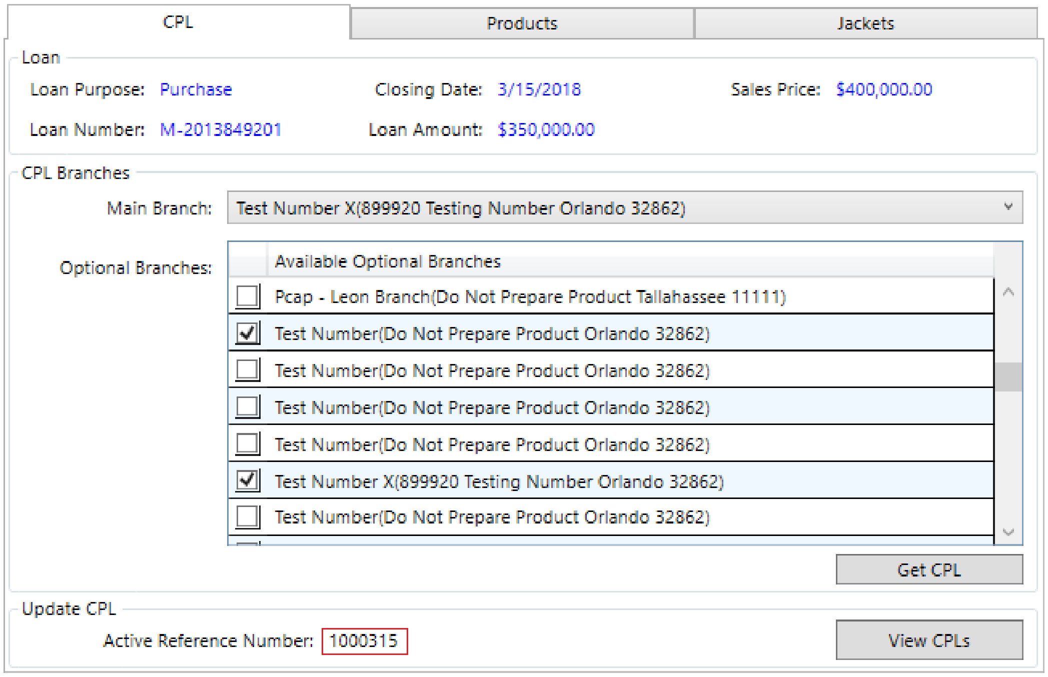
- Select the desired office by clicking on it.

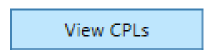
- If there is a branch office that you would like included in the CPL request, check the check box next to the desired branch office in the ***Optional Branches*** list. More than one branch office can be selected.

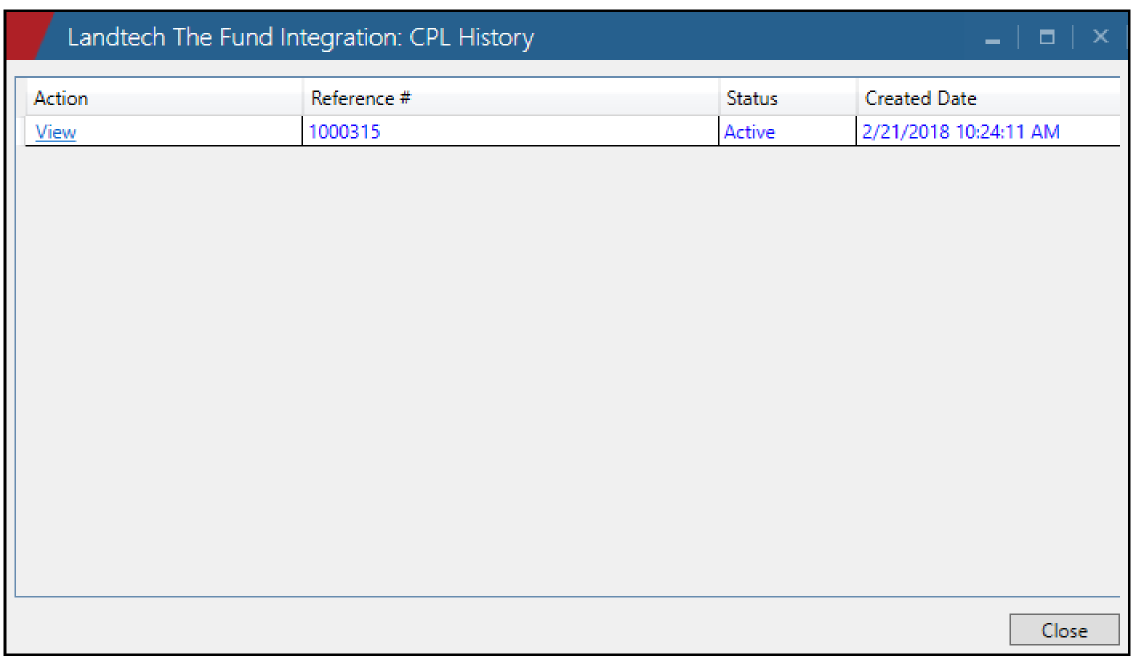


- Click on Get CPL. The Closing Protection Letter will be displayed on your screen as well as downloaded in PDF format to the location on your computer specified in the ***Digital Files Folder*** section of the ***Digital Files Access*** setting under ***Settings***.

- A reference number will appear in the ***Update CPL*** section.



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



- 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***.

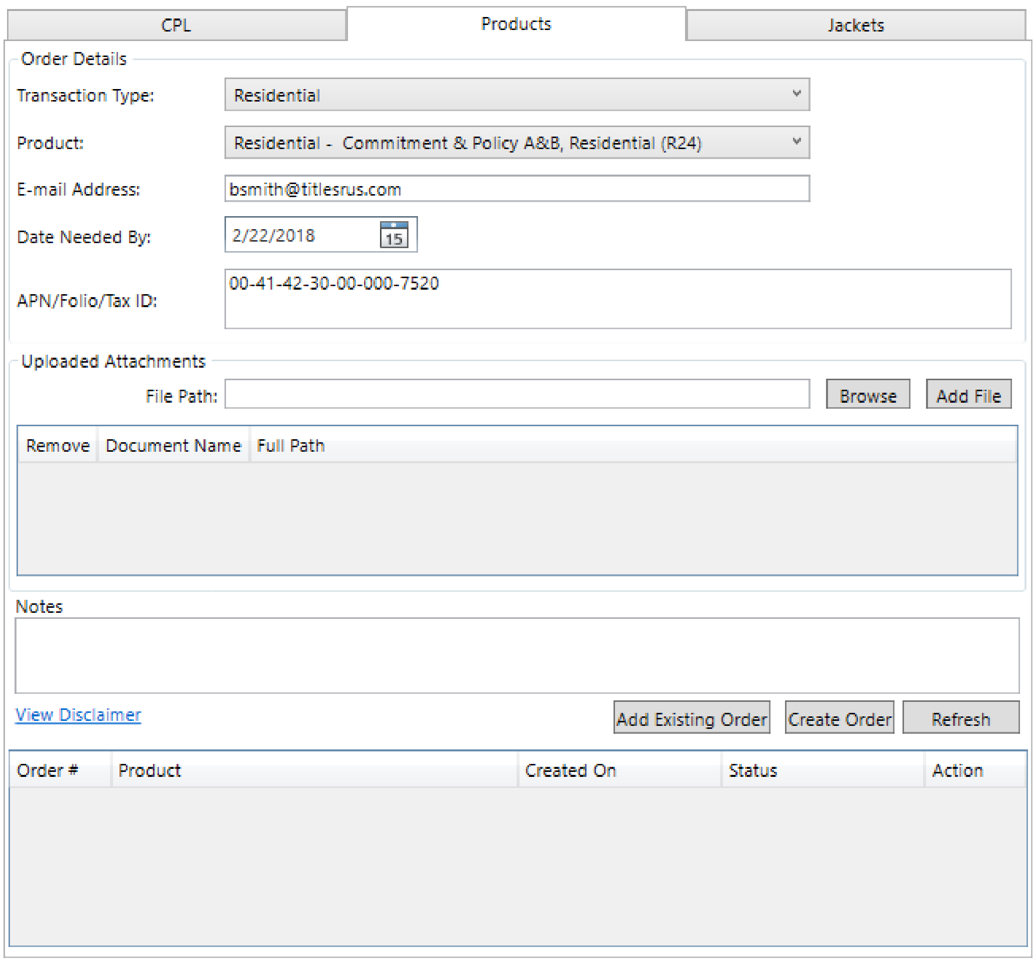
- You can view the CPL by clicking on the ***View*** link.

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

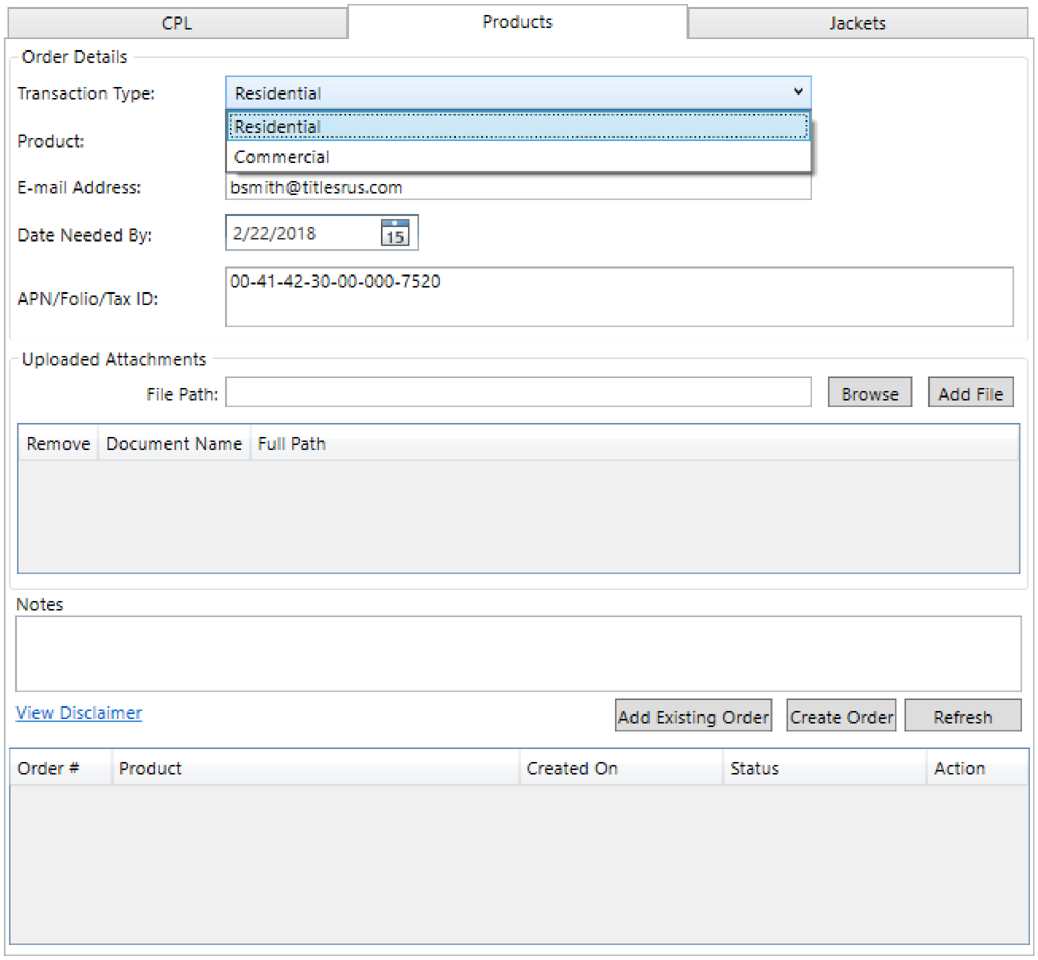
Products

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

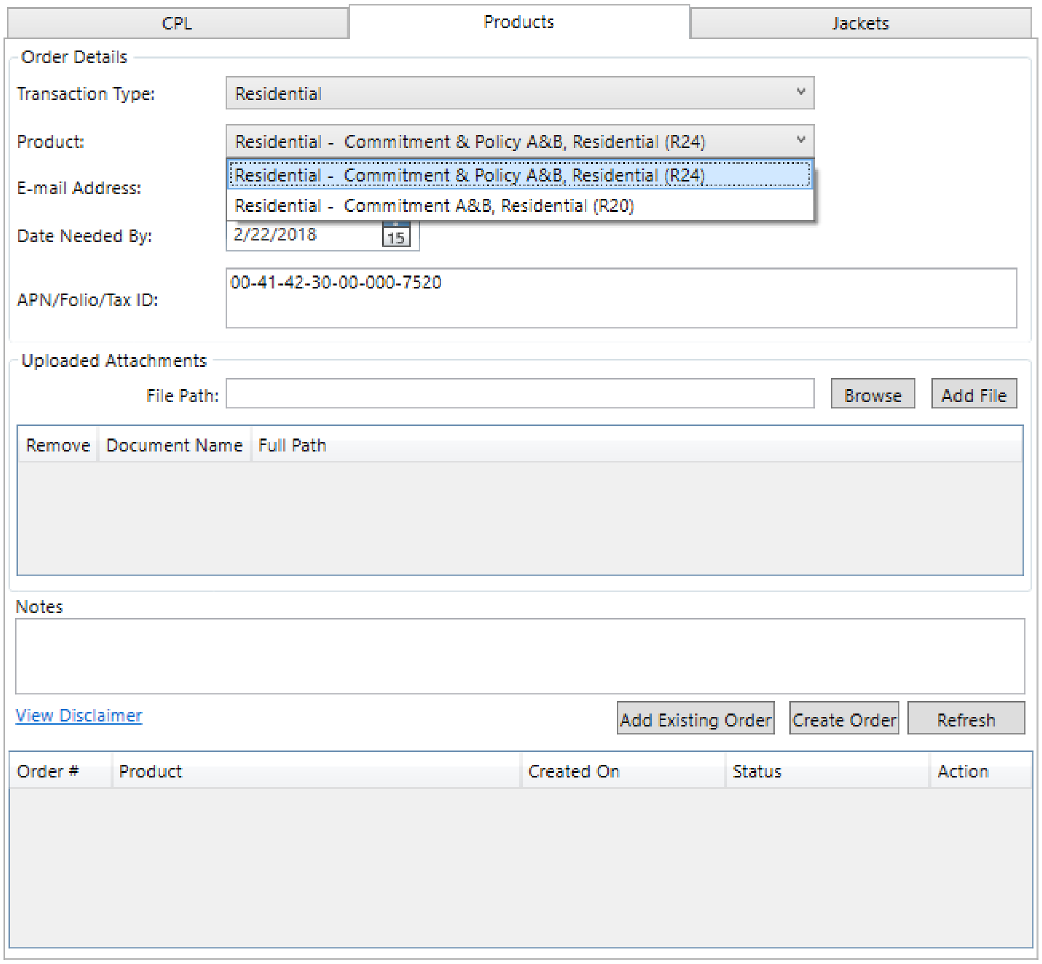
- Click on the ***Products*** tab to display the ***Products*** screen. Here you will find the options available for submitting a title search order.



- 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.



- 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.



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

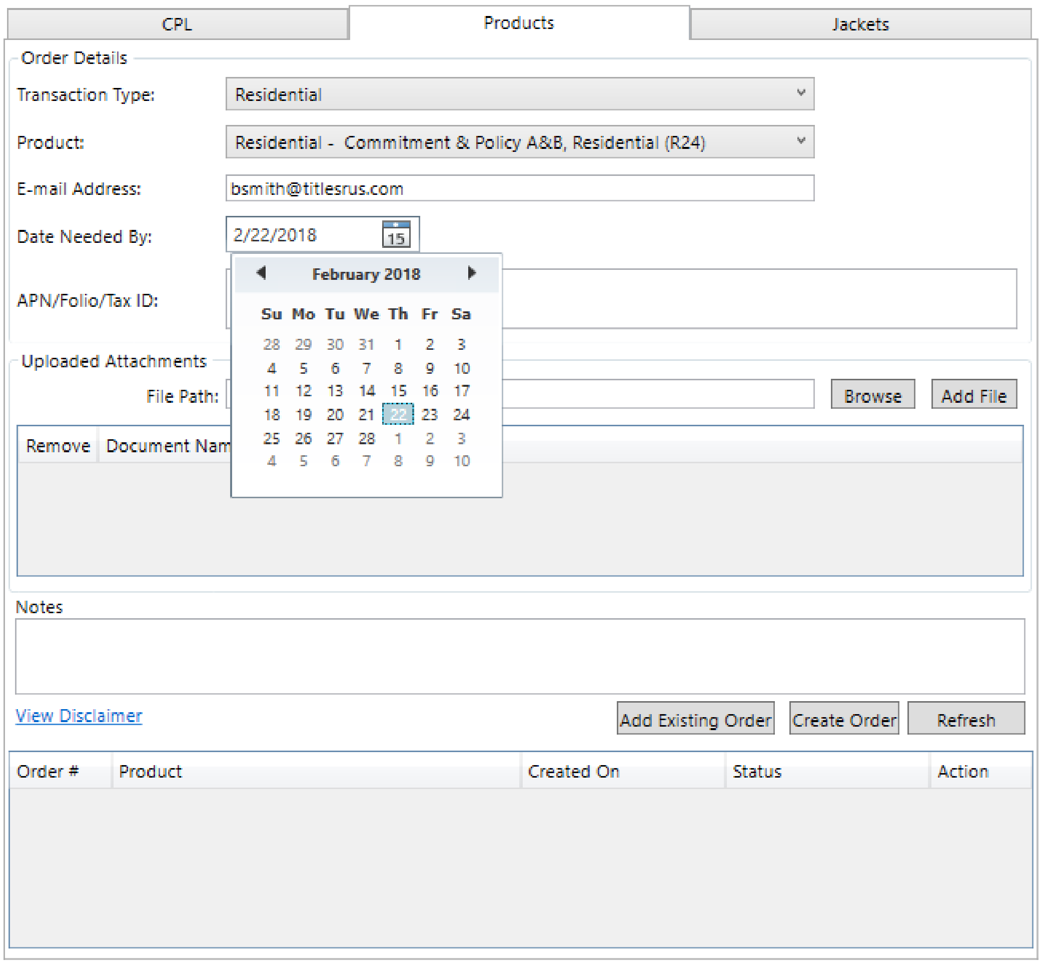
The ***E-mail Address*** field contains the email address of a contact at your company that is to receive notifications and updates about the title search order. It will default to the email address for the contact in the ***Settlement Agent*** section on page 5 of the Closing Disclosure. However, if 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.

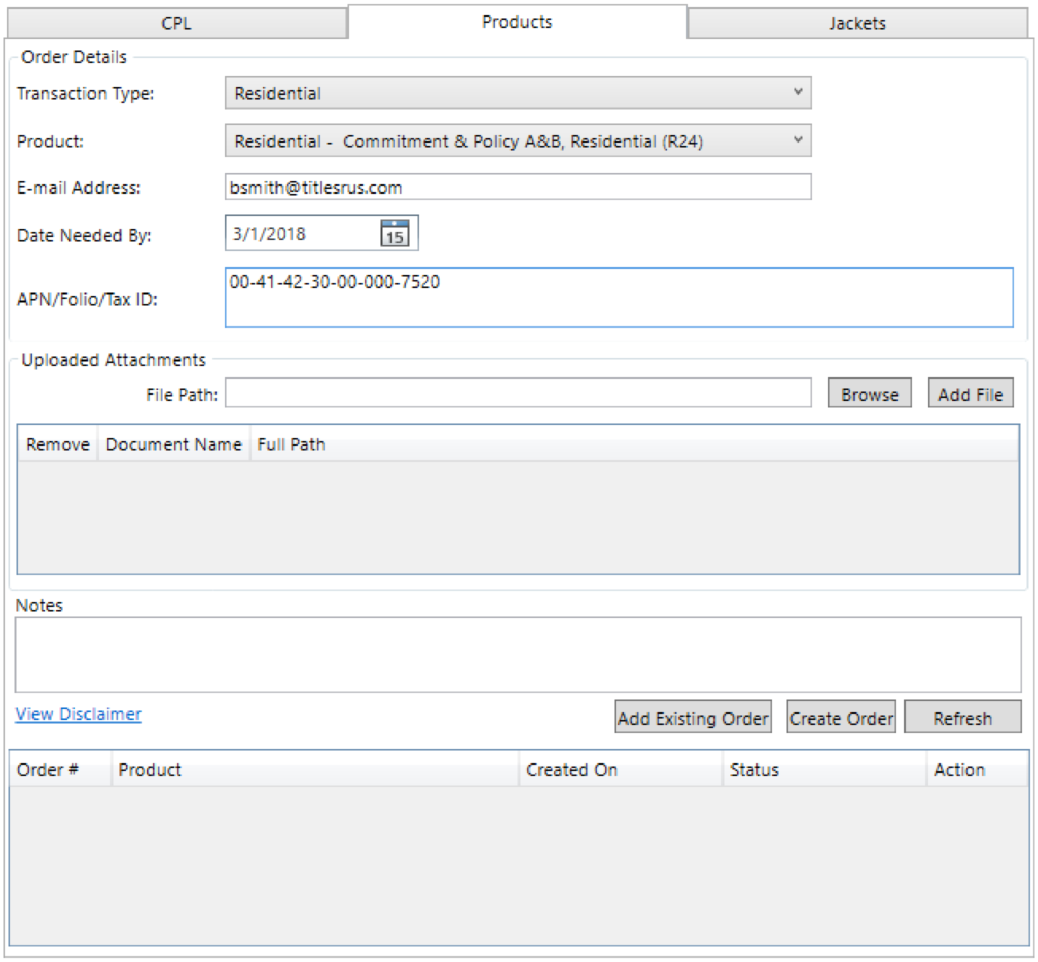
- If the email address showing in the ***E-mail Address*** field is not the correct email address, you can change it. Click in the ***E-mail Address*** field and enter the desired email address.

- 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  icon and select the date from the pop-up calendar.



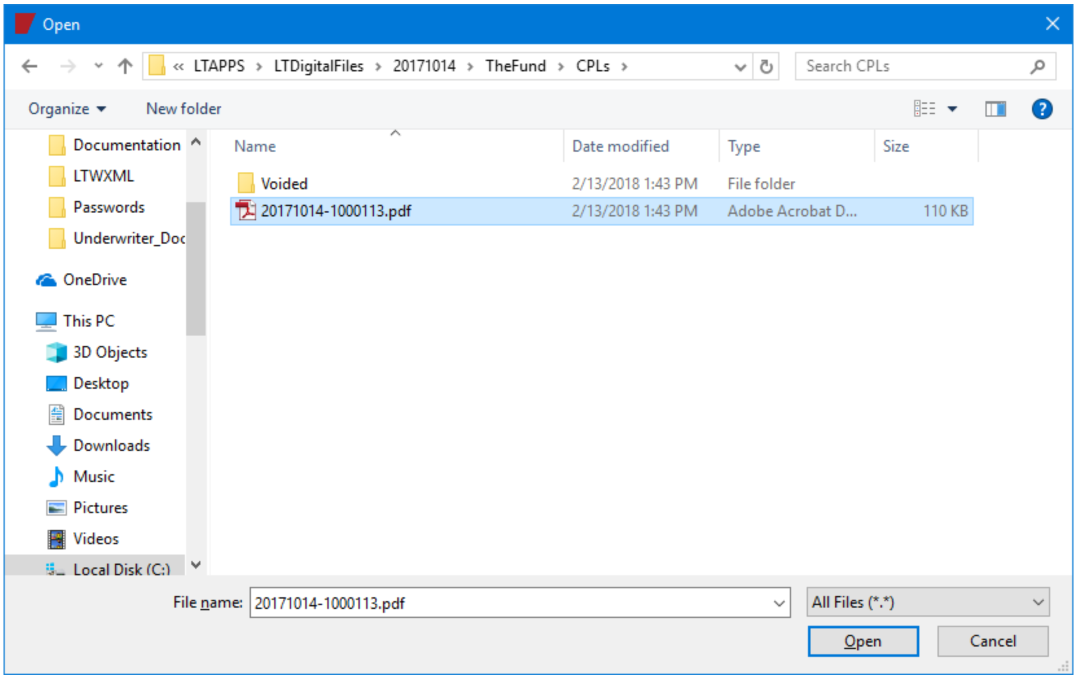
The ***APN/Folio/Tax ID*** field shows the Tax Parcel ID or Property Tax ID that was entered in the ***Tax Parcel or Folio ID*** field in the current open closing file. This information can be modified if necessary. If the property ID was not entered in the closing file, it can be entered here.

- 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.

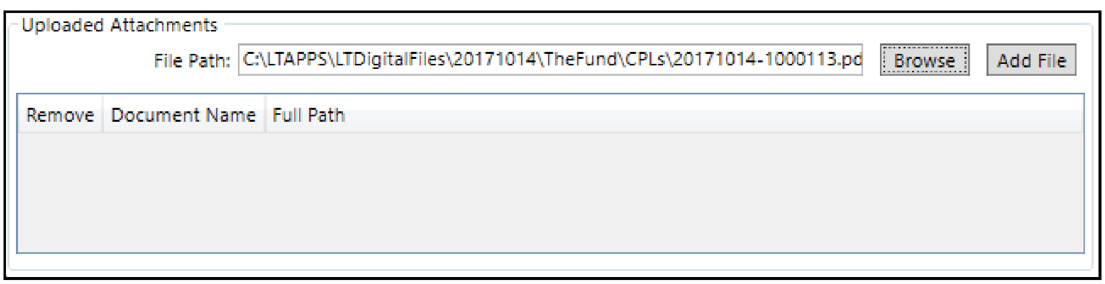


If you need to include a document or documents as supporting information with your order, you can add them in the ***Uploaded Attachments*** section.

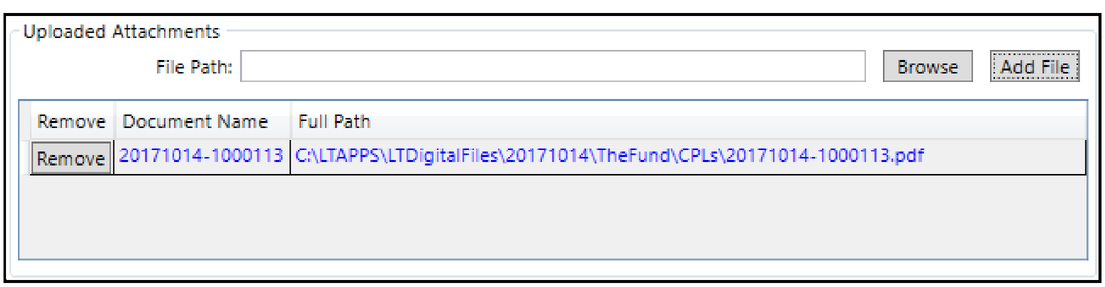
- Click Browse to attach a document. The ***Open*** dialog box will be displayed.



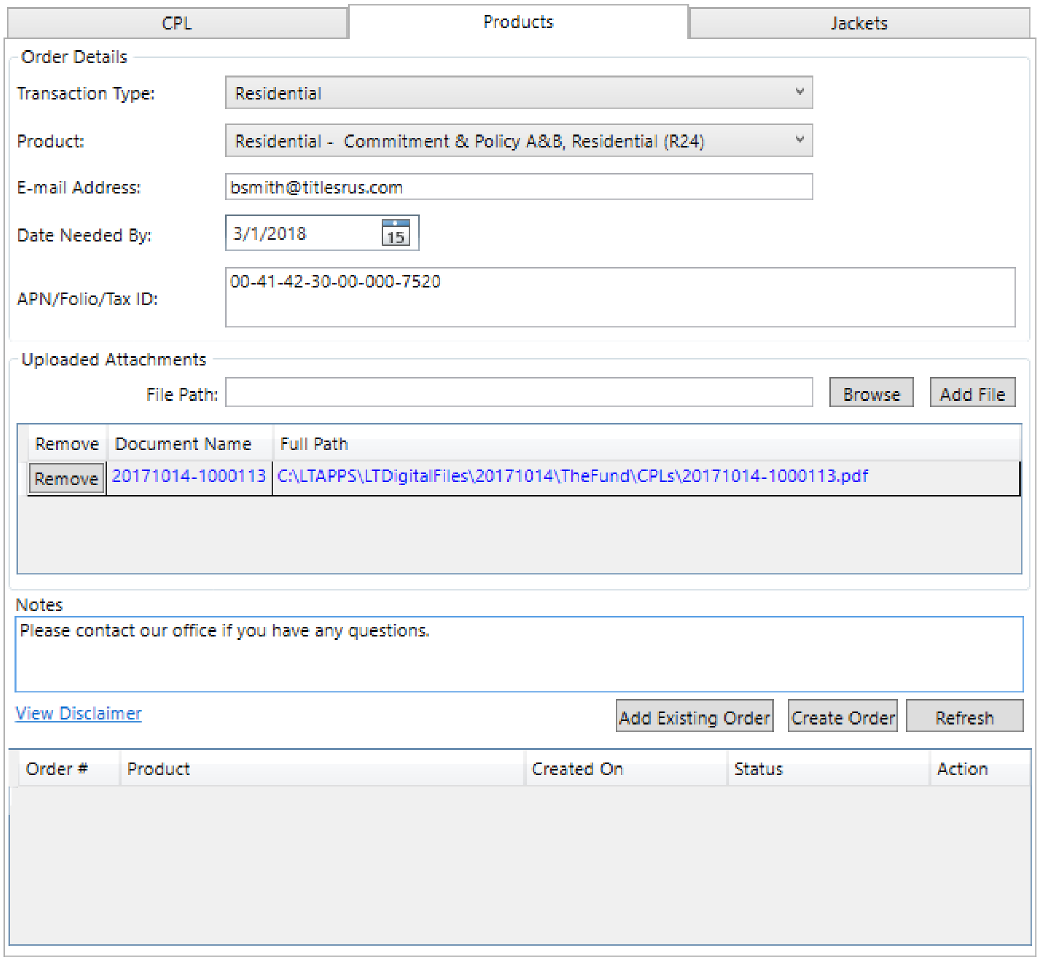
- Navigate to the desired location and select the document that you want to include.
- Click Open to select the document. You will see the path to the document's location listed in the ***File Path*** field.



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

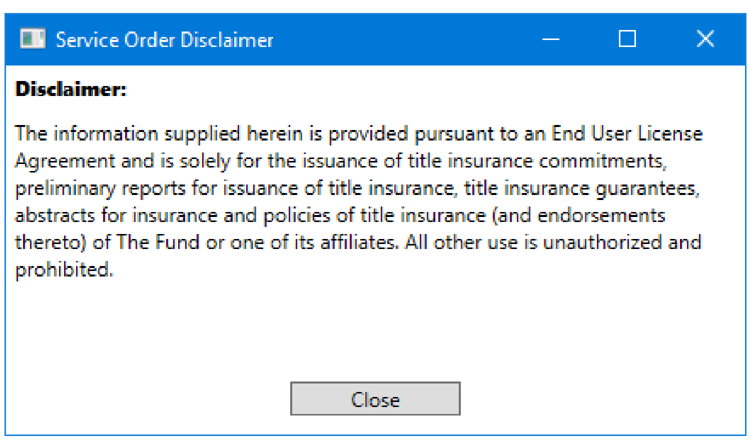


- If for some reason you no longer want to submit this document, you can remove it by clicking Remove. It will no longer show in the documents list.



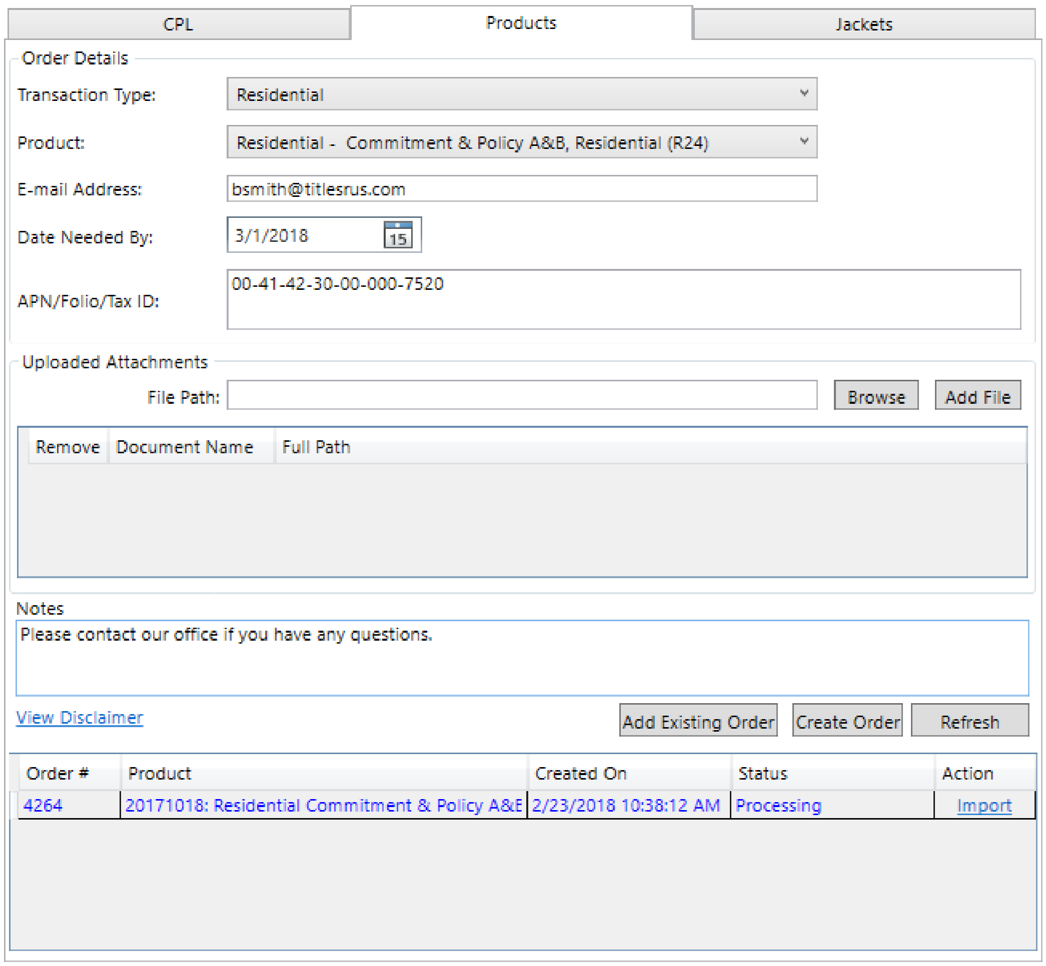
- If you need to provide any additional information or special instructions for the order, click in the ***Notes*** field and enter the necessary information.

- If you click the ***View Disclaimer*** link, you will see the following disclaimer.



- Click Close 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.



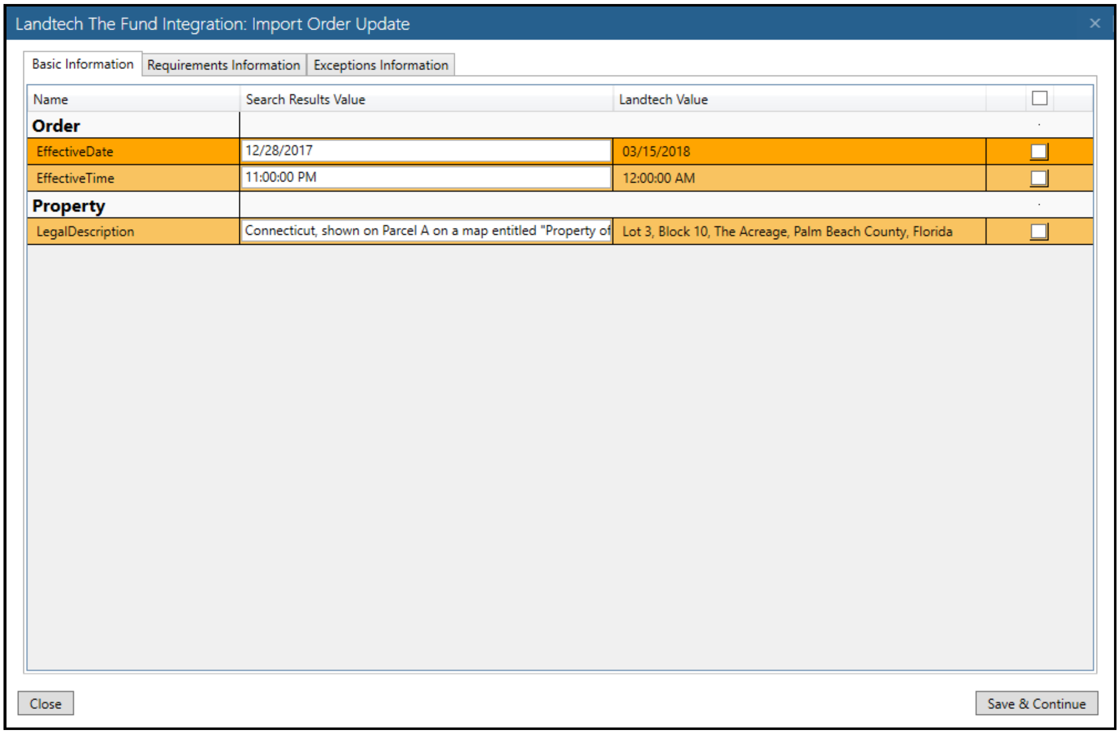
- The ***Status*** column will display the current status of the order. If you want to get an update on the status of your order, you can click Refresh. If there has been a change to the status of your order, it will be reflected in the ***Status*** column.

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.



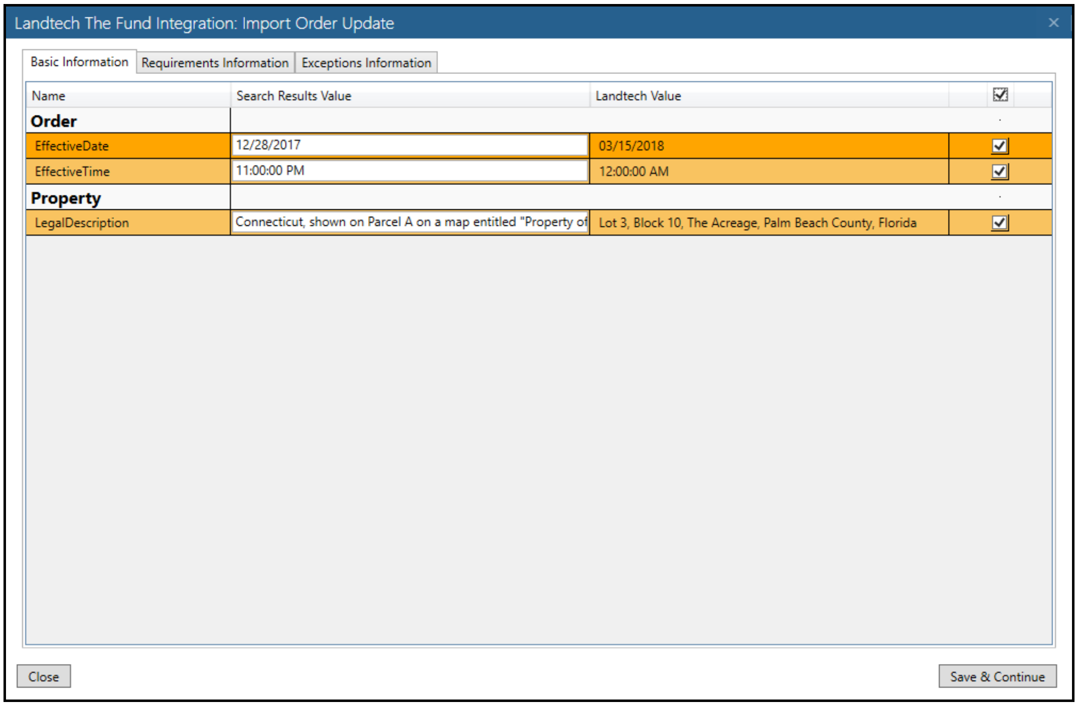
There are three tabs containing all of the information that can be imported into ***Landtech***.

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.

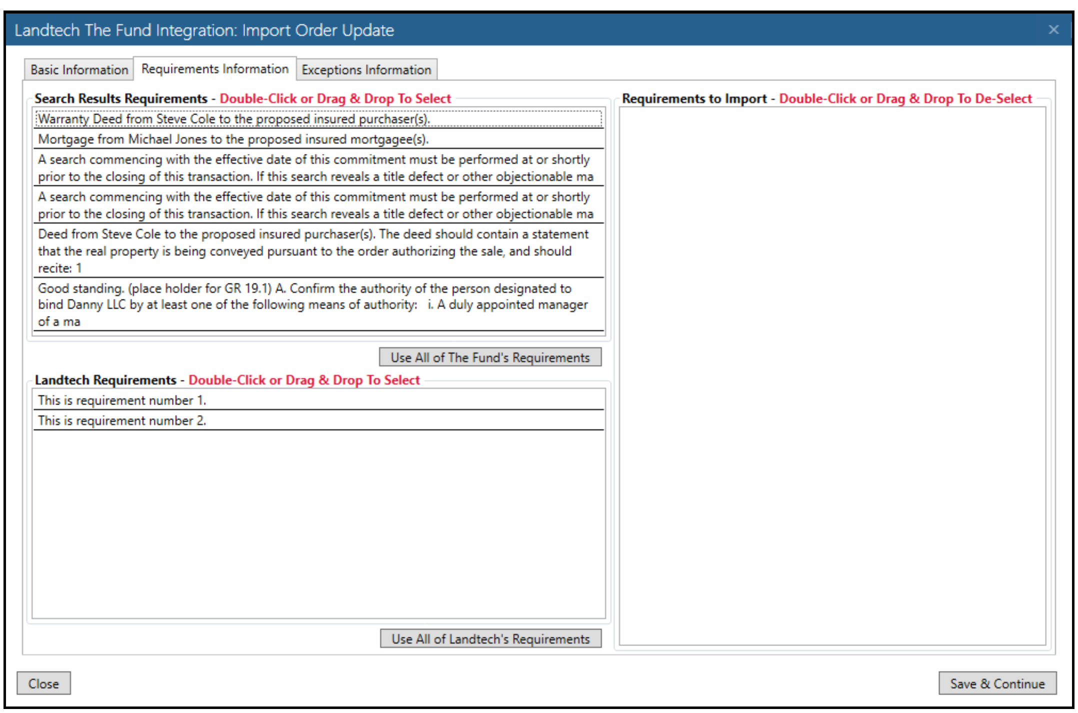
- If you do not want to import the information from the search for a particular field, leave the check box for that field blank and that information will not be imported. The information already in the closing file will be retained.

- 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.



- 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.

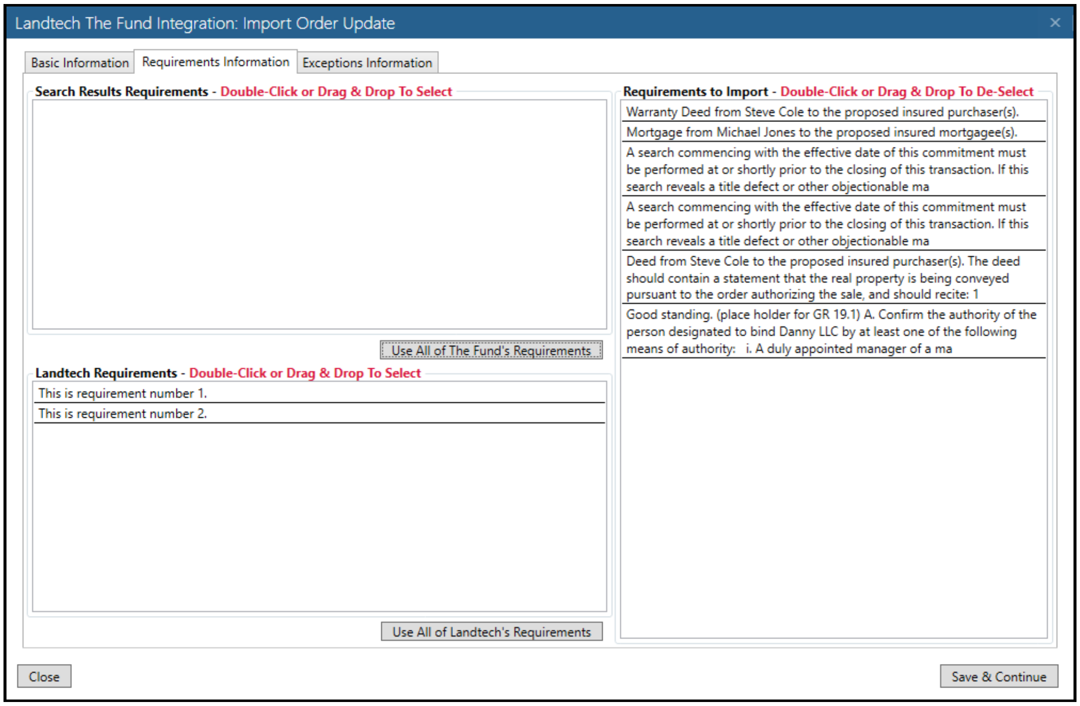
- If you want to include the ***Landtech*** requirements in the import, you can select them all by clicking on the Use All of Landtech's Requirements button.

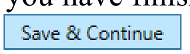
- If you want to only select certain ***Landtech*** requirements, you can either double-click on the requirement or you can drag it over to the ***Requirements to Import*** section and drop it there. Continue doing this until you have selected all of the requirements that you want.

- 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.

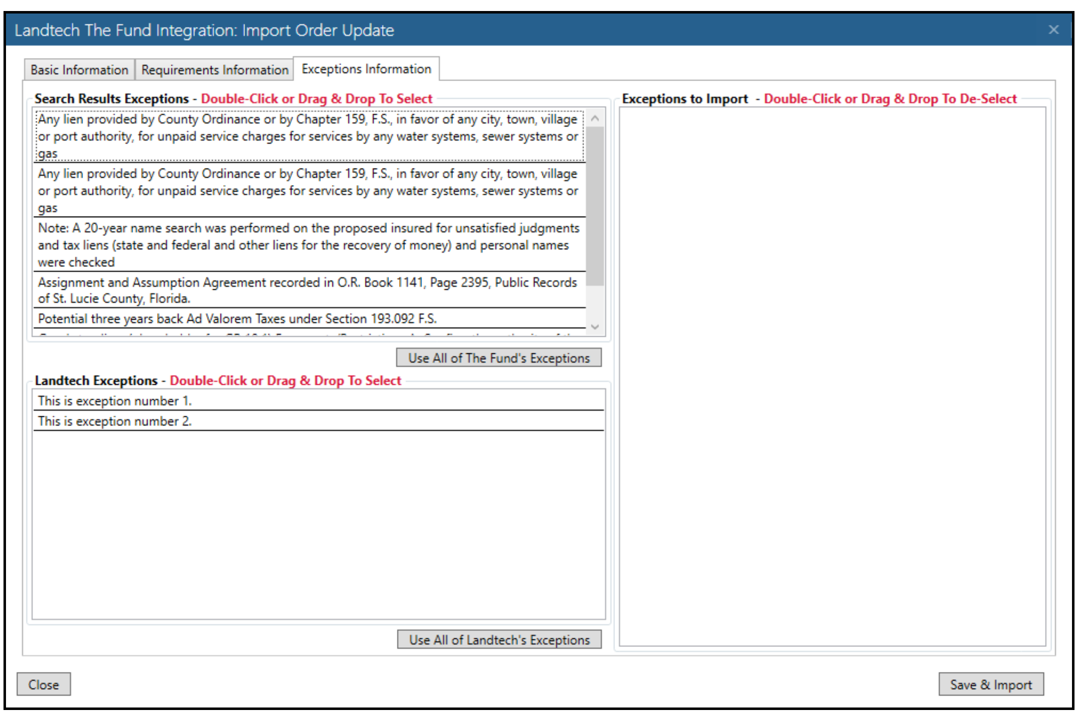
- You can rearrange the order of the requirements in the ***Requirements to Import*** section if desired or necessary by clicking and dragging the requirement to the desired position in the list.

- 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 

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.

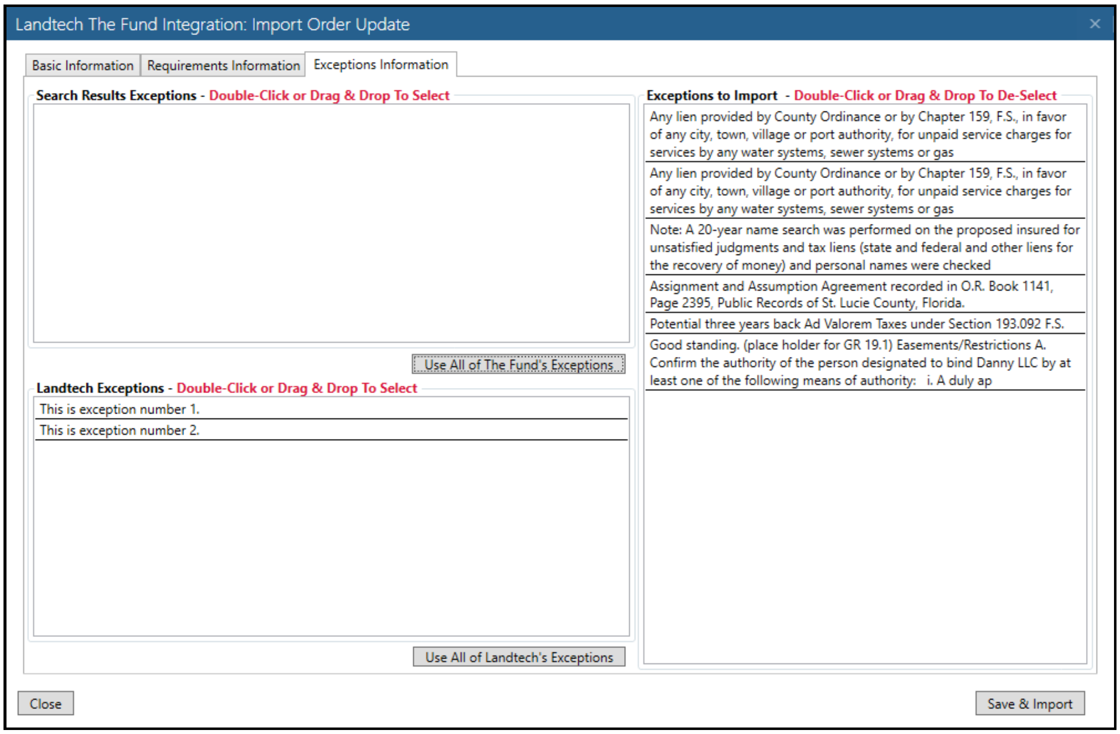
- If you want to include the ***Landtech Exceptions*** in the import, you can select them all by clicking on the [Use All of Landtech's Exceptions] button.

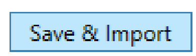
- If you want to only select certain ***Landtech*** exceptions, you can either double-click on the exception or you can drag it over to the ***Exceptions to Import*** section and drop it there. Continue doing this until you have selected all of the exceptions that you want.

- 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.

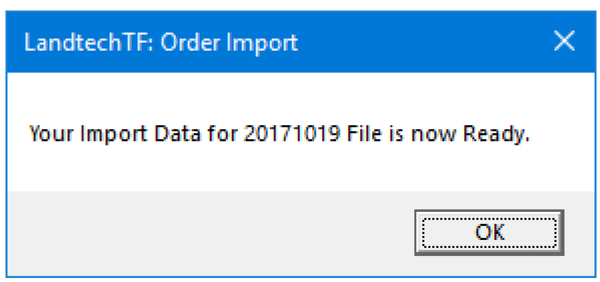
- You can rearrange the order of the exceptions in the ***Exceptions to Import*** section if desired or necessary by clicking and dragging the exception to the desired position in the list.

- 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.



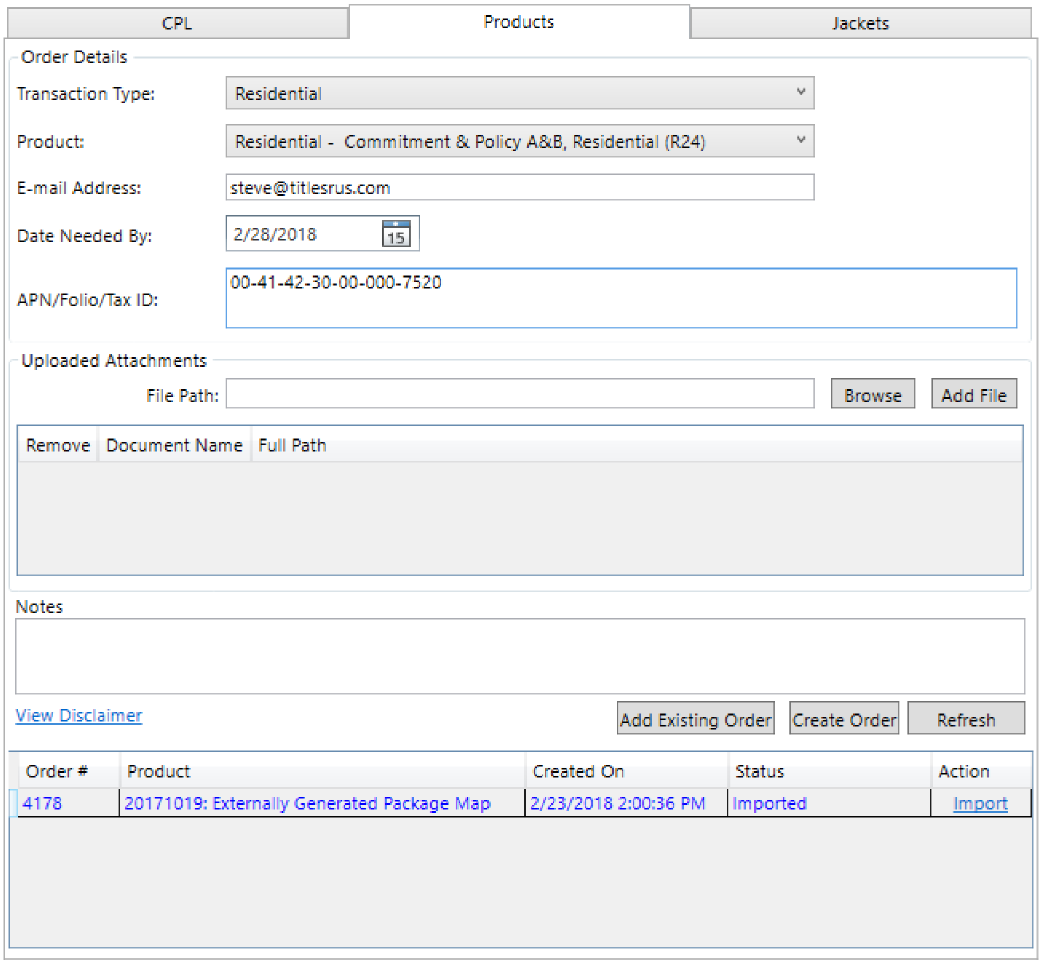
- When you have finished selecting exceptions, click the 

button to continue. You will see the following message.



- Click 

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



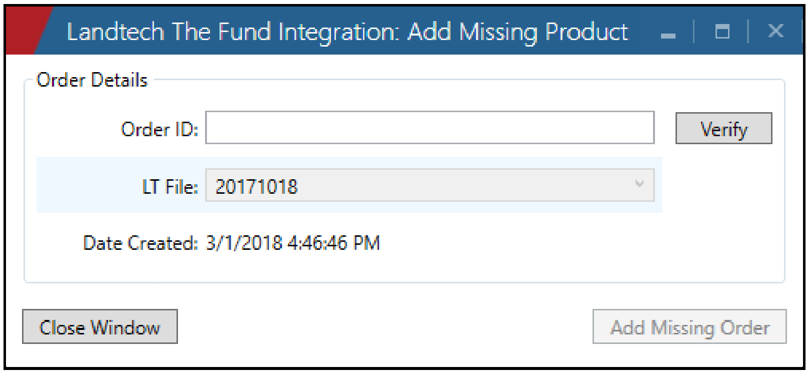
- When you save the current open closing file in ***Landtech***, all of the information that you selected for import will be imported into the closing file.

- 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

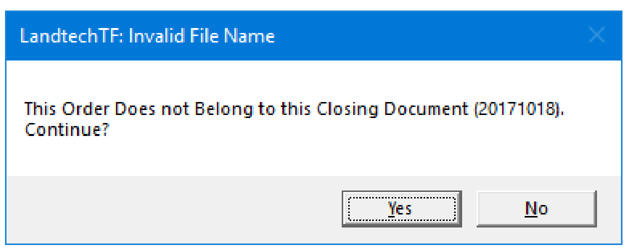
If you have requested a title search through The Fund's web site for a particular file and you would like to have that order added to the integration, you can do so using the ***Add Existing Order*** feature.

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

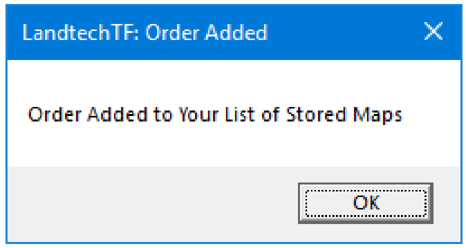


To add an existing order, you will need to know the order number or ID. To get this information you will need to log in to The Fund's web site and locate the order that you want to add. Note the order number associated with or assigned to the order.

- 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 Verify button.
- If the order is a valid order, the Add Missing Order 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 Yes or press **Y**. The Add Missing Order button will become active.
- If you do not want to add this existing order, click No or press **N**.
- Click Add Missing Order to add the existing order. You will see a confirmation that the order has been added.



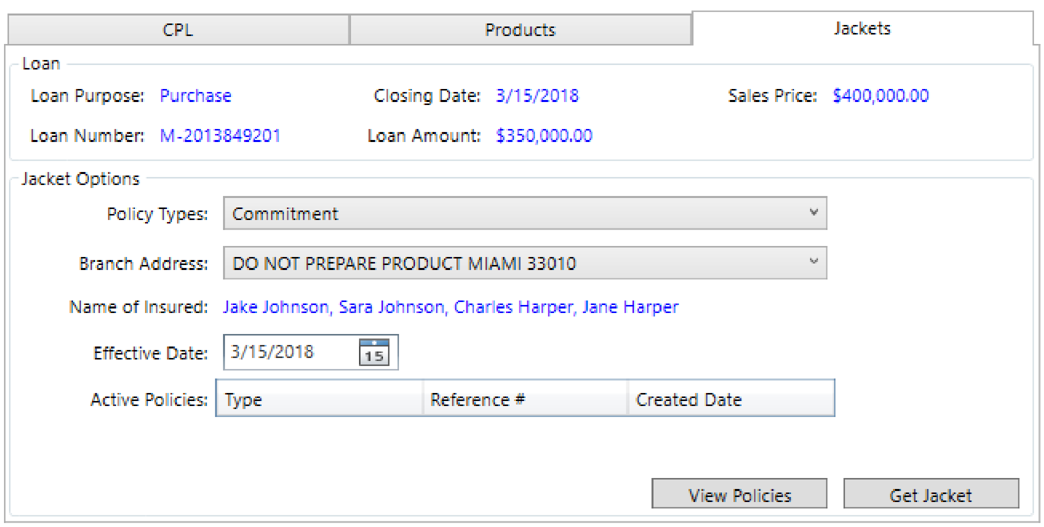
- Click . The order will now be listed on the ***Products*** screen.

Requesting Policy Jackets/Commitments

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

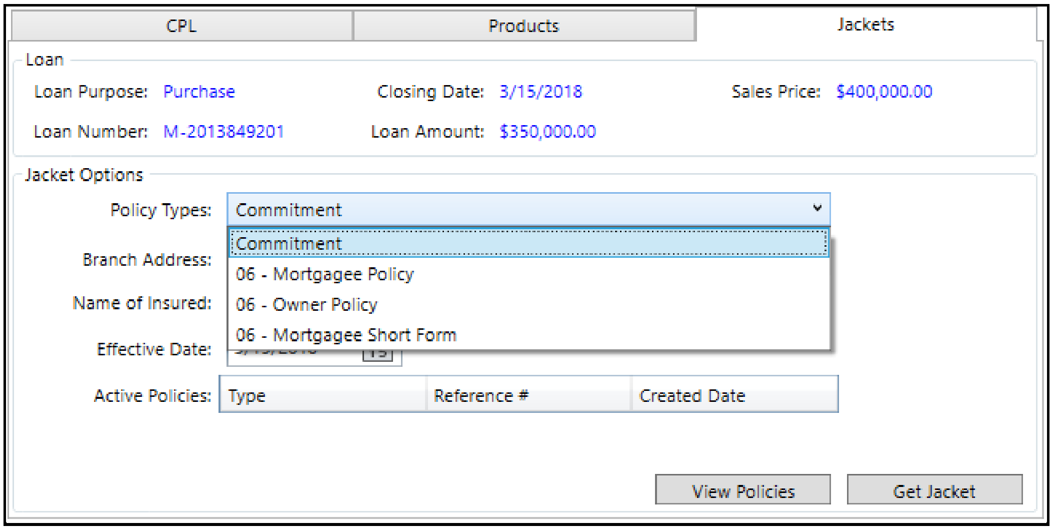
To request a policy jacket or commitment:

- 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.



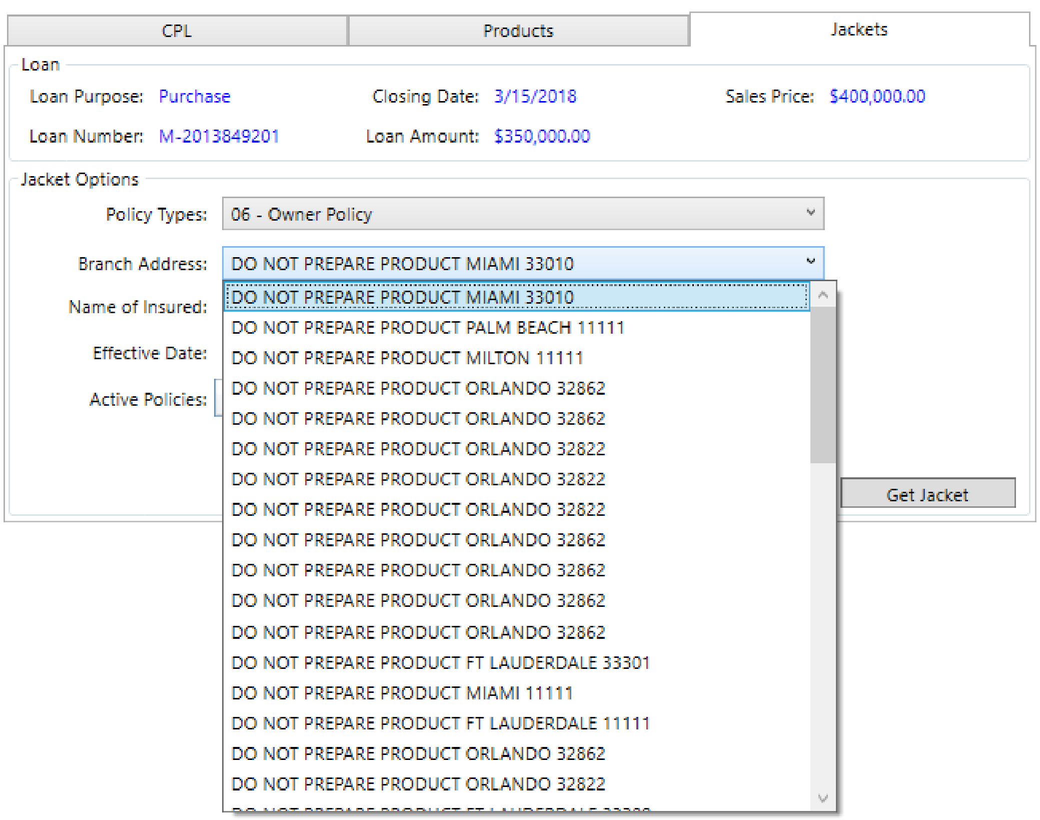
- The information in the ***Loan*** section is pulled from the current open closing file in ***Landtech***.

- In the ***Jacket Options*** section, begin by selecting the policy type.



- 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.

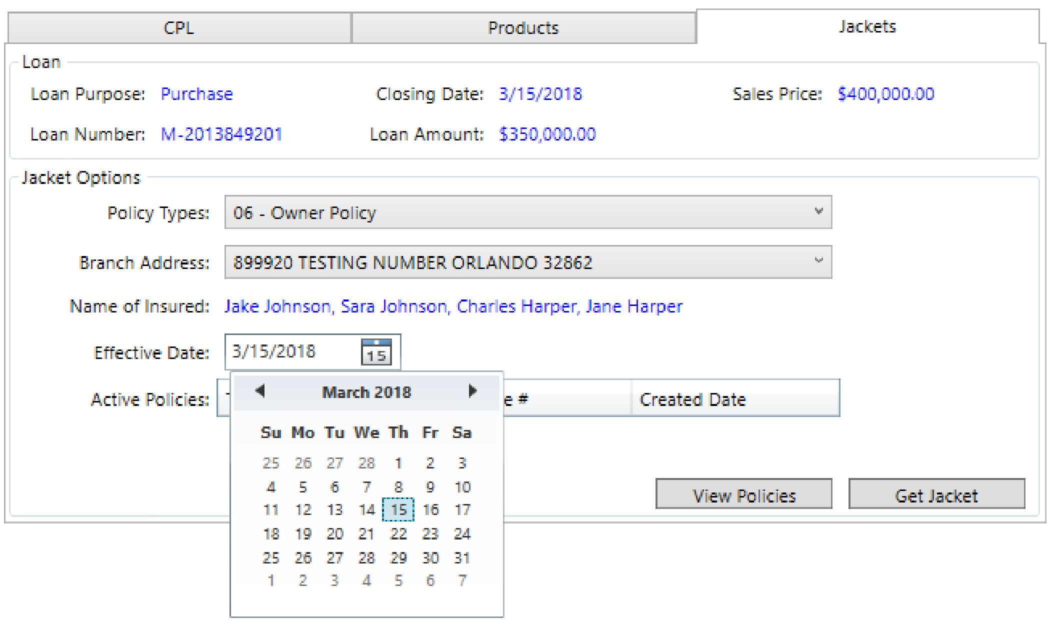
- The ***Branch Address*** field should contain your office location. However, if it does not and there are other selections for your office, you can select a different location. Click on the down-arrow for the ***Branch Address*** field to display the list of office locations. Click on the desired office location to select it.



- 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.

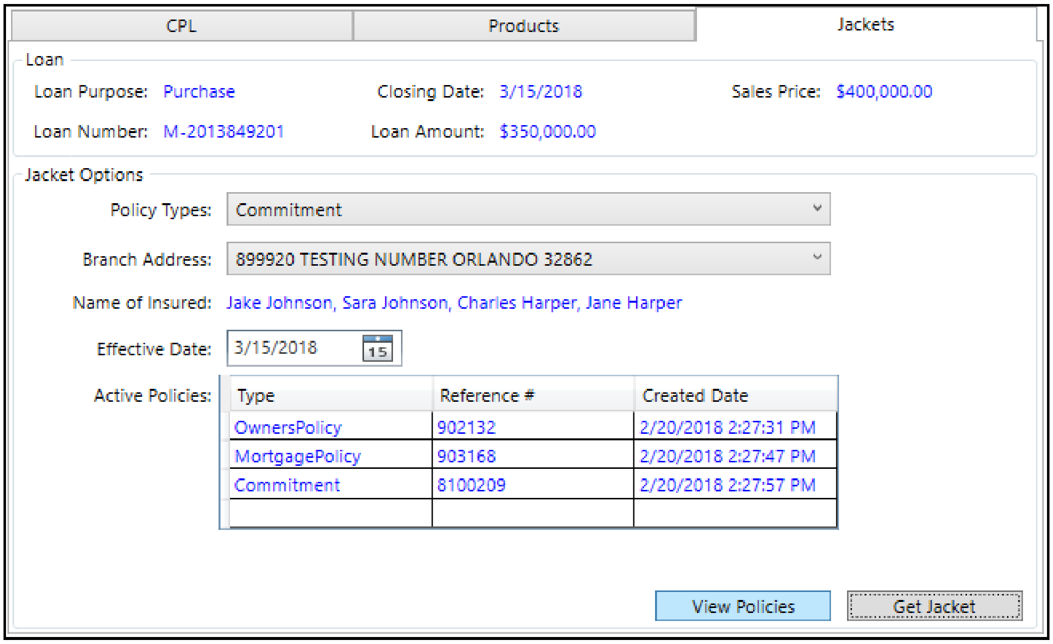
- The ***Effective Date*** field fills automatically with the closing or settlement date that was entered in the closing file. The date can be changed if necessary.

- 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.

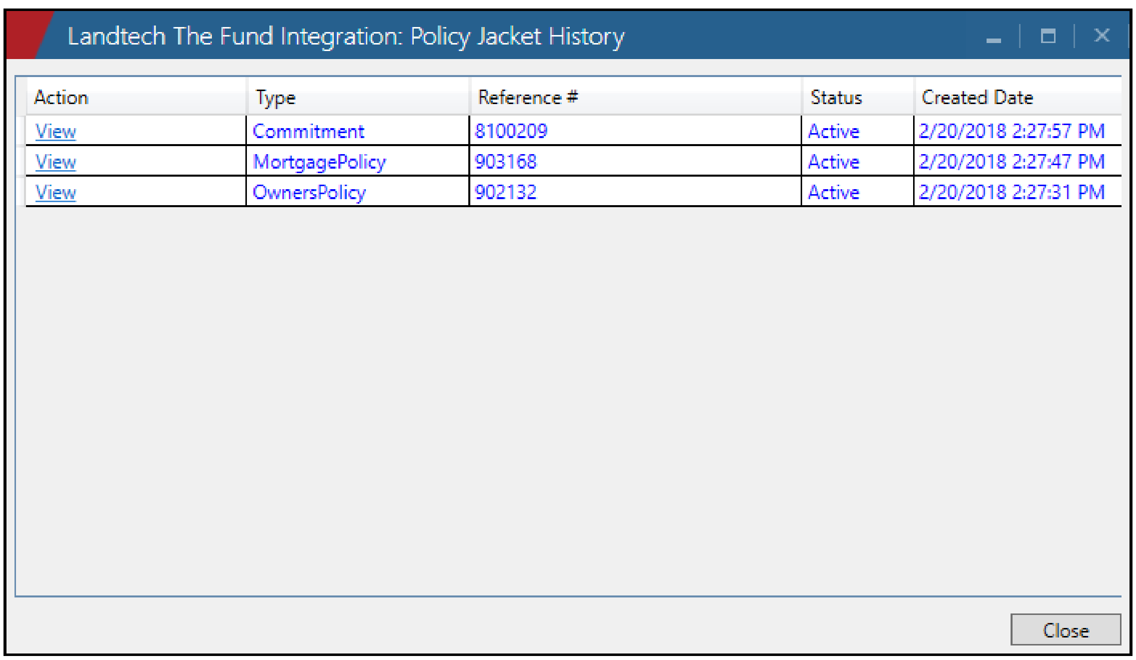


- Once you have selected the jacket type and specified all required information, click on the Get Jacket button. The policy jacket or commitment will be displayed on your screen as well as downloaded in PDF format to the location on your system specified in the ***Digital Files Folder*** section of the ***Digital Files Access*** setting under ***<u>S</u>ettings***.

- All policy jackets and/or commitments that have been requested will be shown in the ***Active Policies*** list.



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

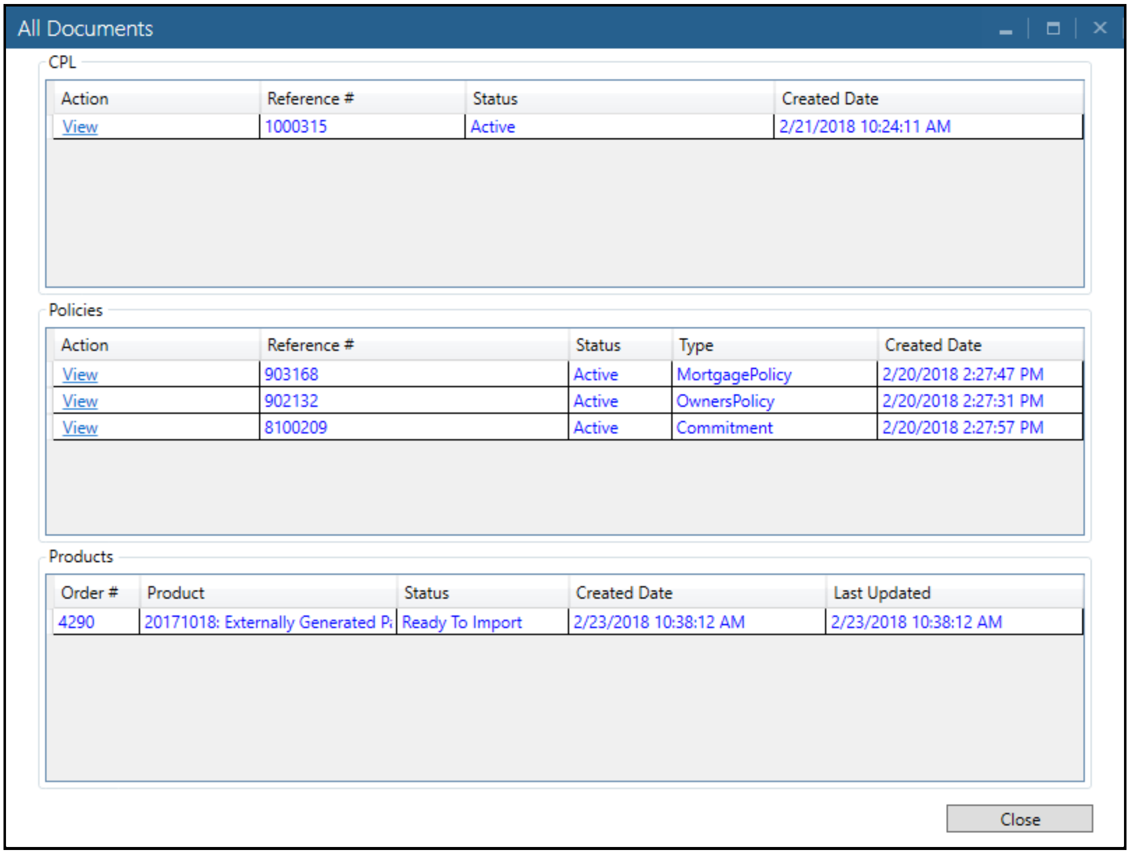


- To view a particular policy or commitment, click on the ***View*** link next to that policy or commitment.

- 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 View All button. The ***All Documents*** dialog box will be displayed.



- 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 Close to close the ***All Documents*** dialog box.

Closing The Fund Product Request

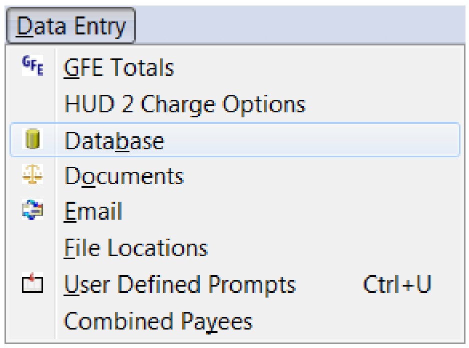
- When you have finished your product requests, click Close to close the product request screen.

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.

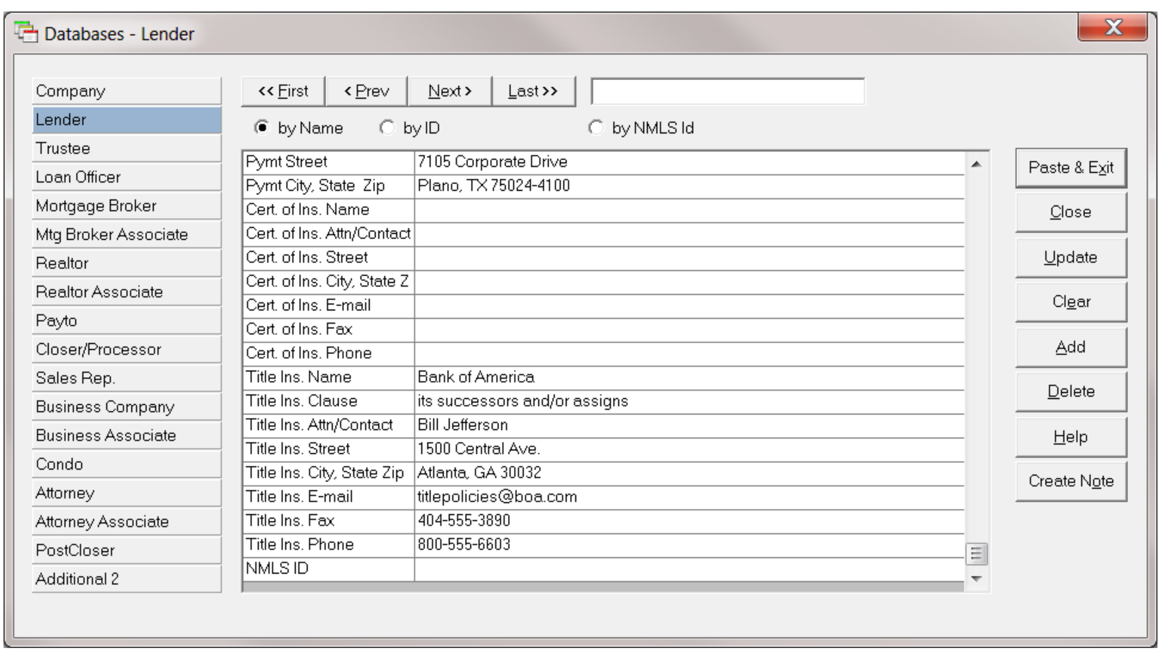
To do so:

- 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***.

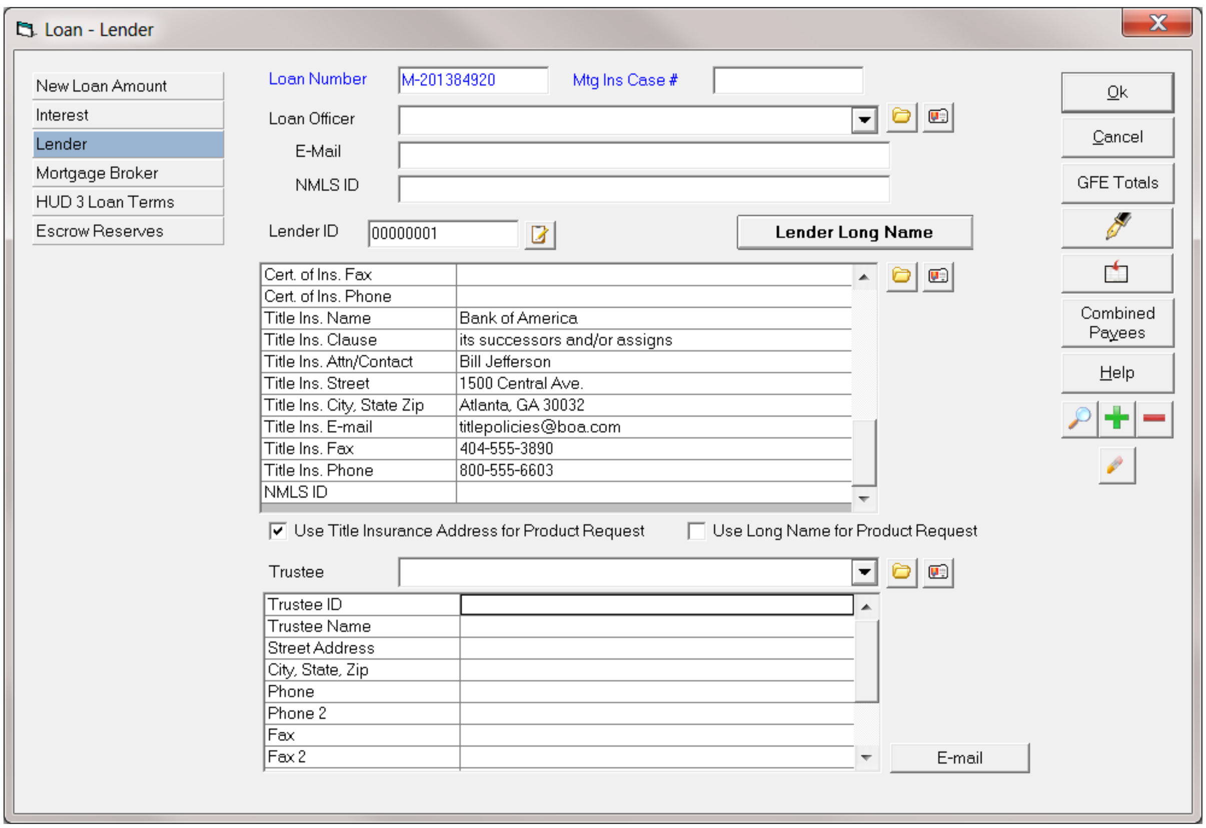


- Enter the information for the desired entity in the appropriate fields and click 

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.

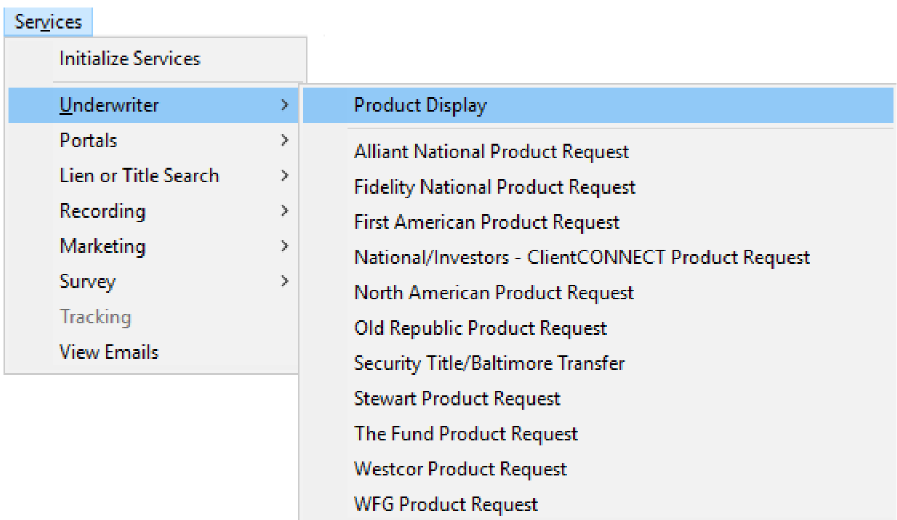
Product Display

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:

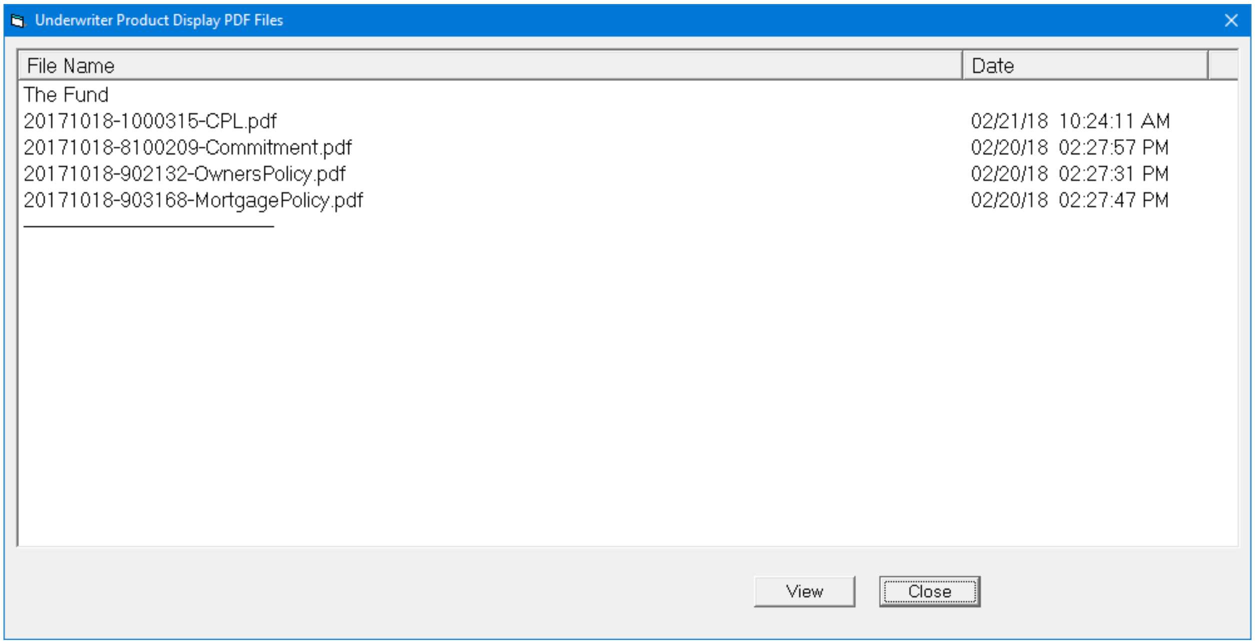
- Click on ***Services*** on the menu bar or press **ALT** + **V**. The ***Services*** drop-down menu is displayed.

- 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.



- Click on the desired document and click View. 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***.