

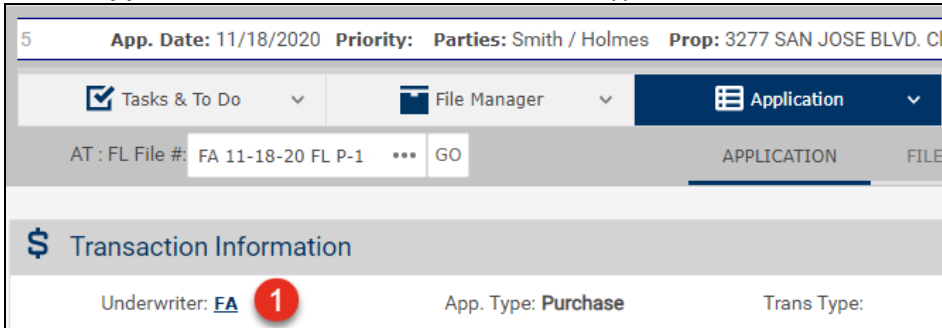


## CPL - Request in TitleFusion

Learn how to request a CPL from your TitleFusion file using the AgentNet® integration.

### Access the Integration

1. On the **Application** screen, click the **Underwriter** hyperlink



### Select Firm, Office, and Underwriter

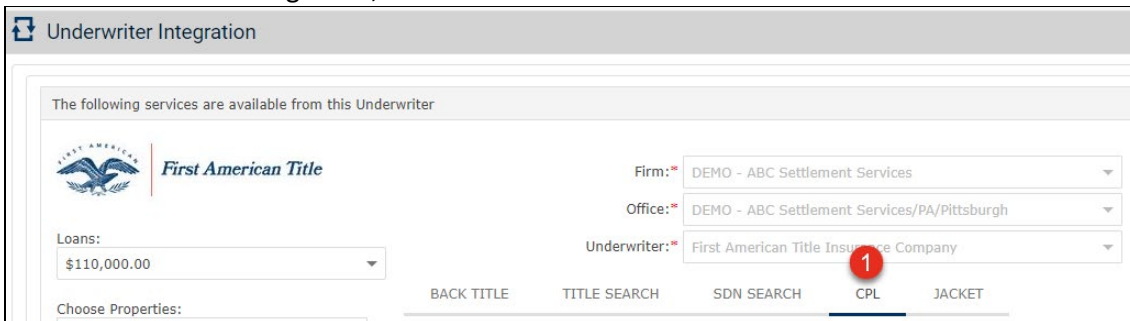
1. If applicable, select the **Firm** in the drop-down list
2. If applicable, select the **Office** in the drop-down list
3. If applicable, select the **Underwriter** in the drop-down list



**NOTE:** If you have previously submitted a request for a product or service for the file, these options will be grayed out.

### Select CPL and Options

1. Under Underwriter Integration, select **CPL**

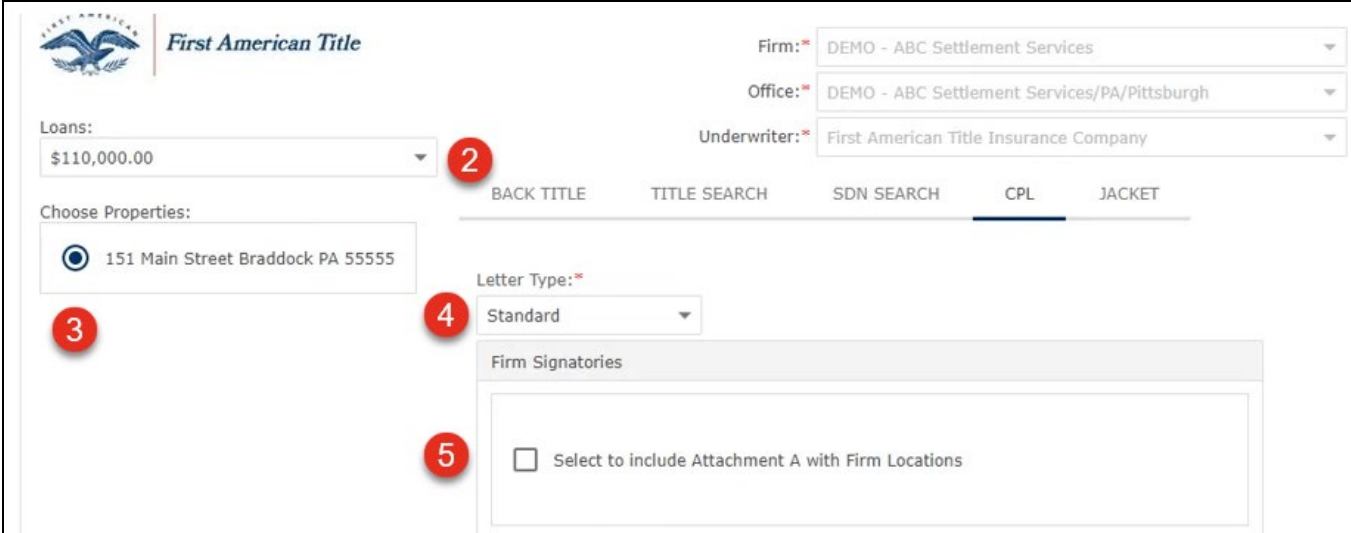


2. Select the loan, if applicable
3. Select the property, if applicable
4. Select the **Letter Type**

**NOTE:** Available options will depend on your region or state.



5. Click the checkbox to include Schedule A with multiple Firm Locations, if desired



First American Title

Firm: DEMO - ABC Settlement Services

Office: DEMO - ABC Settlement Services/PA/Pittsburgh

Underwriter: First American Title Insurance Company

Loans: \$110,000.00

Choose Properties:

151 Main Street Braddock PA 55555

Letter Type: Standard

Firm Signatories

☐ Select to include Attachment A with Firm Locations

## Enter Loan Information and Request CPL

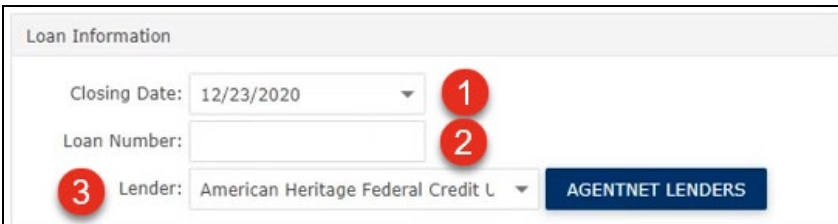
1. Select the **Closing Date**

**NOTE:** By default, the date pulls from the **Application** screen.

2. Enter the **Loan Number**

**NOTE:** The **Loan Number** will pull from **Application** if entered and is not a required field.

3. Verify the **Lender** information is accurate



Loan Information


Closing Date: 12/23/2020

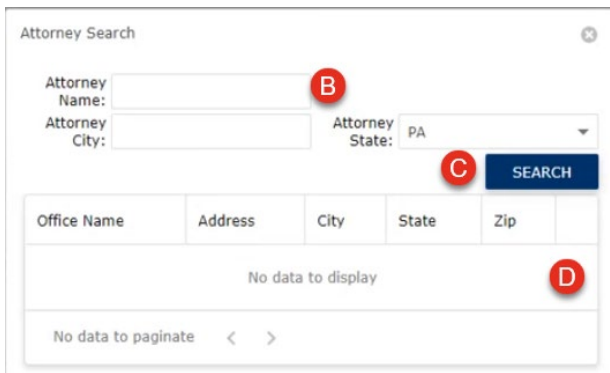
Loan Number:

Lender: American Heritage Federal Credit L

AGENTNET LENDERS

4. The **Approved Attorney** will default to agent office. To choose a different approved attorney:

- Click  to browse for an Attorney
- Enter search criteria
- Click **Search**
- Click **Select** to choose a result



Attorney Search

Attorney Name:

Attorney City:

Attorney State: PA

SEARCH

Office Name	Address	City	State	Zip
No data to display				

No data to paginate

5. Click **REQUEST CPL**

Additional Parties

4 Approved Attorney: ABC Settlement Services , 987 Sample Driv

\* If an Approved Attorney is not selected, AgentNet will use the firm's default attorney

Additional Party:

5

## 6. The CPL displays in the Underwriter Integration area

First American Title™

**CLOSING PROTECTION LETTER  
SINGLE TRANSACTION  
FIRST AMERICAN TITLE INSURANCE COMPANY**

"Addressee":

"Date": 1/25/2021

"Issuing Agent" or "Approved Attorney":  
ABC Settlement Services  
987 Sample Drive  
Suite 100  
Pittsburgh, PA 15205

"Real Estate Transaction":  
Seller: Sally Seller  
Buyer: Billy Buyer  
Street Address: 151 MAIN STREET, BRADDOCK, PA 55555

Closing Date: 1/26/2021  
Loan Number:  
File #:

Re: Closing Protection Letter

Dear Sir or Madame,

## NOTES:

- The CPL is added to the **Documents** screen.

Application	Documents	Commitment	Charges & Fees	Policy	Notes	AccuTitle
Jennifer						
Documents				Category	Last Modified	Modified By
CPL PA LENDER 19932192				CPL	01/25/2021 11:33 AM	JennFA

- A line item for the CPL is added to the grid in the bottom of the Underwriter Integrations area.

Item	Description	Reference	Vendor Order Number	Policy / Cert Number	Order Status	Requested By	Requested	Received	Voided		
CPL	Standard	LENDER	19932192	19932192	Complete	JennFA	1/25/2021 11:33:00 AM	1/25/2021 11:33:00 AM			



## 2<sup>nd</sup> Party/Additional Party CPL Option (if applicable)

1. Click to browse for an **Additional Party**

Additional Parties

Approved Attorney: ABC Settlement Services , 987 Sample Driv

\* If an Approved Attorney is not selected, AgentNet will use the firm's default attorney

Additional Party: **1**

2. Select the Additional Party's **Role**
3. Select the Additional Party's **License State**
4. Enter criteria in the search fields
5. Click **Search**
6. Click **Select** in the list to choose a result

Second Party

Role: -- Please Select -- **2** License State: --Please Select-- **3**

**Office Information**

Name: **4**

City: State: --Please Select-- County: Zip: **5** **SEARCH**

Office Name	Address	County	City	Office State	Zip
No data to display <b>6</b>					

No data to paginate < >

7. Click **REQUEST CPL**

Additional Parties

Approved Attorney: ABC Settlement Services , 987 Sample Driv

\* If an Approved Attorney is not selected, AgentNet will use the firm's default attorney

Additional Party: **7**

## Void CPL

1. Return to the underwriter integration page
2. Locate the CPL in the products grid at the bottom of the Underwriter Integration screen
3. Click the red **X** to void the CPL and move it to the Archive folder in the **Documents** screen

Item	Description	Reference	Vendor Order Number	Policy / Cert Number	Order Status	Requested By	Requested	Received	Voided			
CPL	Standard	LENDER	19932192	19932192	Complete	JennFA	1/25/2021 11:33:00 AM	1/25/2021 11:33:00 AM				




## Cancel Entire File

### 1. Click CANCEL ENTIRE FILE

Item	Description	Reference
Title Search	AgentNet Search Product ordered for 3249 Adams Ct Bensalem PA 19020	Sale w/Mortgage;Residential;AgentNet Search Product;Condominium
Jacket	ALTA Owner Policy (6-17-06)	Owner Policy
CPL	Standard	LENDER
CPL	Standard	LENDER
Back Title	Loan Policy	11/30/2015

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 CANCEL ENTIRE FILE


### 2. Click OK in the confirmation window

An embedded page at servicesgateway.titledesktop.com says

This will void ALL CPL and Jacket requests for this file! Continue?

### NOTES:






- A pop-up message confirms the file was deleted



**SUCCESS**

File Cancelled successfully

- The **Order Status** column in the item grid is updated

Item	Description	Reference	Vendor Order Number	Policy / Cert Number	Order Status	Requested By	Requested	Received	Voided			
Title Search	AgentNet Search Product ordered for 3249 Adams Ct Bensalem PA 19020	Sale w/Mortgage;Residential;AgentNet Search Product;Condominium	5190997		Cancelled	JennFA	2/3/2021 5:23:42 AM		2/3/2021 12:37:00 PM			
Jacket	ALTA Owner Policy (6-17-06)	Owner Policy		24770857	Cancelled	JennFA	2/2/2021 1:46:22 PM	2/2/2021 1:46:22 PM	2/3/2021 12:37:00 PM			
CPL	Standard	LENDER	19963014	19963014	Voided	JennFA	1/27/2021 4:46:00 PM	1/27/2021 4:46:00 PM	1/27/2021 5:22:00 PM			
CPL	Standard	LENDER	19963000	19963000	Cancelled	JennFA	1/27/2021 4:45:05 PM	1/27/2021 4:45:05 PM	2/3/2021 12:37:00 PM			
Back Title	Loan Policy	11/30/2015		50113420198402e	Cancelled	JennFA	1/25/2021 8:00:03 PM	1/25/2021 8:00:03 PM	2/3/2021 12:37:00 PM			



- All documents are voided and moved to the Archived folder on the **Documents** screen

		<input type="checkbox"/>	VOIDED 2/3/2021-ALTA Owner Policy (6-17-06) 5011442-0411464e	Policy	02/02/2021 01:46 PM
		<input type="checkbox"/>	VOID_CPL PA LENDER 19963014	CPL	01/27/2021 04:46 PM
		<input type="checkbox"/>	VOIDED 2/3/2021-CPL PA LENDER 19963000	CPL	01/27/2021 04:45 PM
		<input type="checkbox"/>	VOIDED 2/3/2021-BackTitle via First American Loan Policy	Search Results	01/25/2021 08:00 PM

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<input checked="" type="checkbox"/> Show Archived Documents (4)	Select all Documents	Mark Selected Docs NPI
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