



Virtual Project Sequence Utility

What is Fortis MergeIt?

MergeIt is designed for **mortgage brokers, lenders, title companies, automotive dealers, legal firms** and other organizations that require a simple way to pull Fortis documents from various Document Types or databases into one cohesive loan, title, deal jacket or legal packet that can be automatically delivered to a lender (e.g., Countrywide, Citibank, etc.) or service bureau.

MergeIt allows a user to enter one or several key values to retrieve Fortis documents from various Document Types - and export the result set into one cohesive TIFF or PDF file.

Additionally, the application can append a bar code cover page as the first page with data elements relating to the package, again in TIFF format. To achieve the most scalable functionality, the application supports the addition, deletion, and modification of cover page templates. This allows for additional lenders to have separate cover pages with different data and easily modify existing cover pages to support additional lender requirements. As defined, a single cover page is supported and can optionally be included in the export.

MergeIt also provides auto sorting of documents. For instance based on the lending, title or general deal jacket format - MergeIt can sort or sequence Fortis documents so certain predefined pages come before others. MergeIt automatically reorders pages to fit within your required virtual project format requirements.

MergeIt Target Market

- Mortgage lenders
- Mortgage brokers
- Title companies
- Financial services
- Legal
- Municipalities
- Automotive dealers
- Construction

What is the Business Case?

Part of the difficulty in managing mortgage loans is the paperwork and delivery of documents to lending institutions. With MergeIt, users within a mortgage company can quickly find all related documents throughout





Fortis within one single interface. The lender then gets the loan package in the order, format and delivery method they require which reduces post processing lending functions. The mortgagee then gets the loan quicker and each party within the process significantly reduces their overhead costs.

How Does it Work?

- With MergeIt, users type a docket, packet, title or loan number into a prompt and a .Net Web Service pulls all documents throughout the Fortis system and exports them in proper order to a single PDF or TIFF file and then uploads the file to an FTP site, network folder or presents the file in Adobe Acrobat for e-mailing.
- Export details are currently defined for the Countrywide and Citibank lending formats
 - This can be customized to meet your needs for a different lending institutions
- A web form allows for a loan number or series of loan numbers to be provided.
 - Additional elements on the form include export type (PDF or Tiff), and lender
- Authentication to the web form is controlled through Windows/IIS permissions.
- A single Fortis logon is used to authenticate to Fortis and perform the export(s).

MergeIt Process Flow

Customization

- Optionally, based on the lender an additional page will be added as page one to each file.
 - The new cover page contains data related to each loan number.
- Data for the cover page is pulled directly from a SQL Server data source

Requirements

- MergeIt is written using ASP.Net.
- The .Net Framework 2.0 and ASP.Net are required on the web server hosting the application.
- A Fortis LAN client installation is required on the server hosting the application.

