

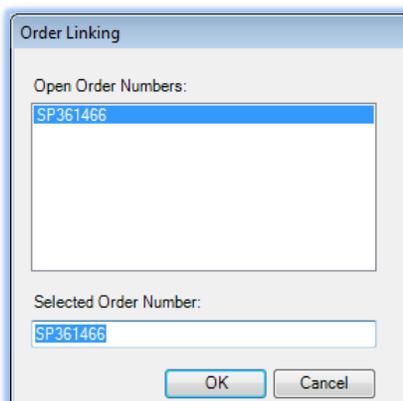
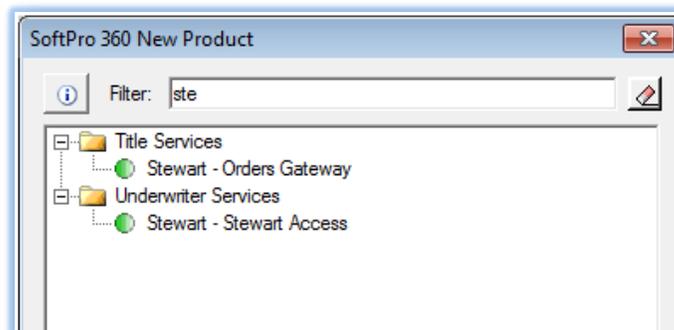
## Stewart Access within the Impact/SQL SoftPro 360 Widget

### Getting Started – How to Submit a Transaction

**Stewart Access** can be accessed via the Impact/SQL SoftPro 360 Widget. This documentation will assume that the user is familiar with the Impact/SQL SoftPro 360 widget.

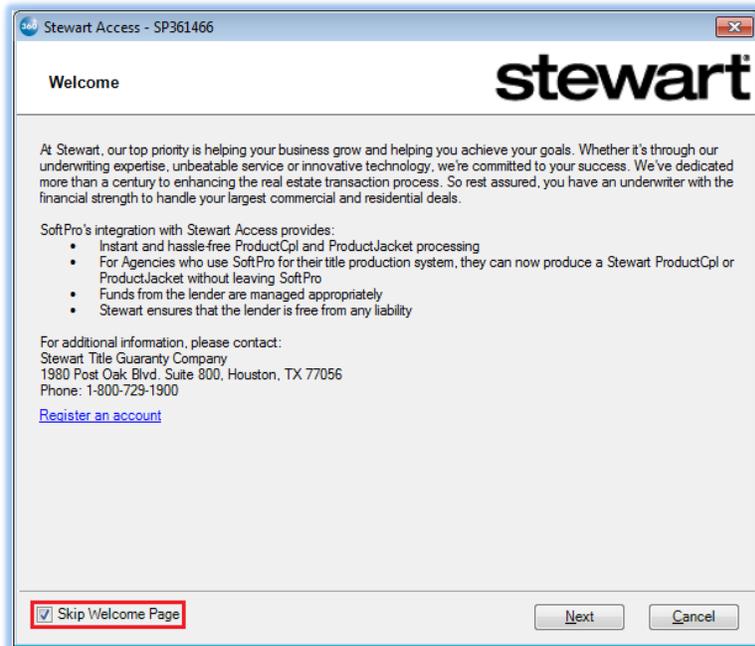
It is recommended that the file be opened on the user’s Impact/SQL desktop, but it is not mandatory.

The SoftPro 360 widget should be opened and the **New Product** button should be clicked. The **SoftPro 360 New Product** screen will present. **Stewart – Stewart Access** can be found under **Underwriter Services**. Depending on the number of products available it might be helpful to use the **Filter** field to narrow down the listing to locate the **Stewart – Stewart Access** product. In the sample below, “ste” was entered in the **Filter** field, thus narrowing the selection list to only the products shown. To select the product, simply double-click on “**Stewart – Stewart Access**” or alternatively, highlight “**Stewart – Stewart Access**” and then click on the **OK** button.

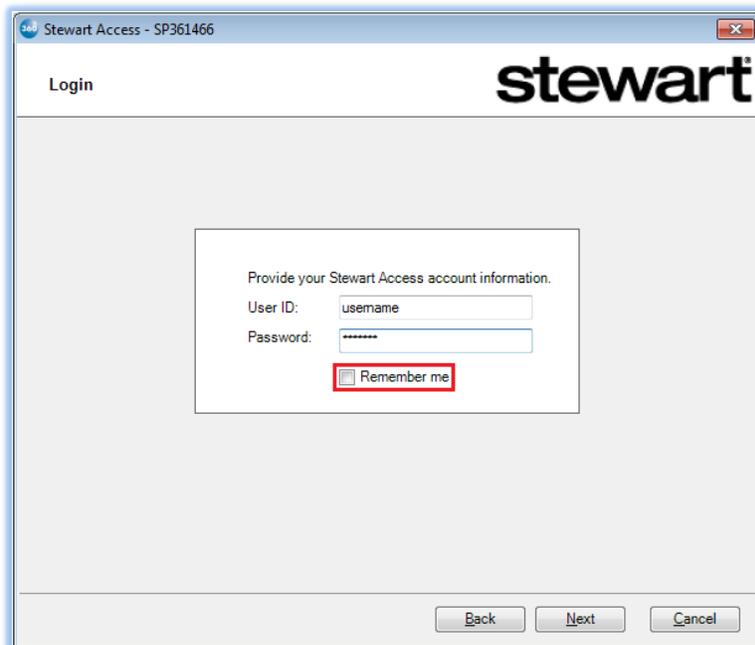


Assuming that the file for which rates are to be requested was open on the desktop, the **Order Linking** screen will present with the open file’s number pre-loaded on the screen. Should the file not have been opened on the desktop, the user should enter the file number in the **Selected Order Number** field. Once the file number is confirmed to be the one desired, click on the **OK** button or hit the **Enter** key to continue.

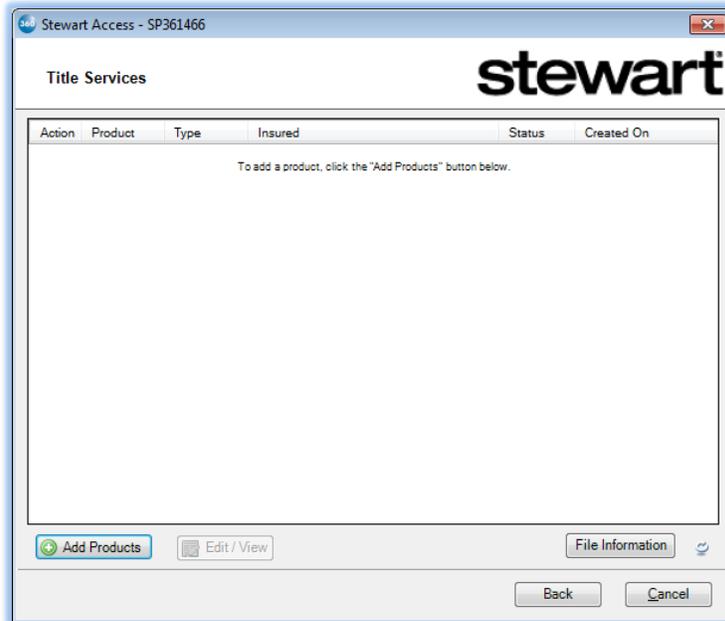
The **Welcome** screen provides information about **Stewart Access**. The user may choose to skip this screen in the future by clicking on the **Skip Welcome Page** checkbox to select it. Click **Next** to continue.



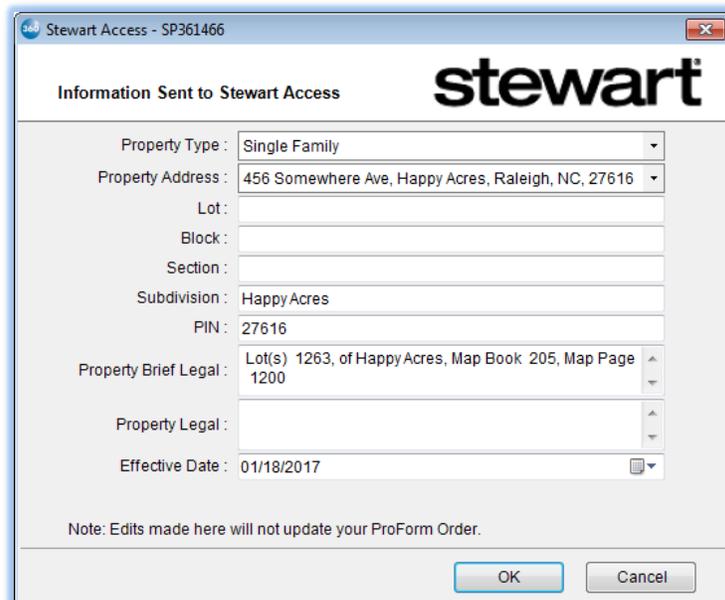
The user should enter their **Stewart Access User ID** and **Password** and click **Next** to continue. Checking the **Remember Me** checkbox will pre-enter the saved credentials on subsequent uses.



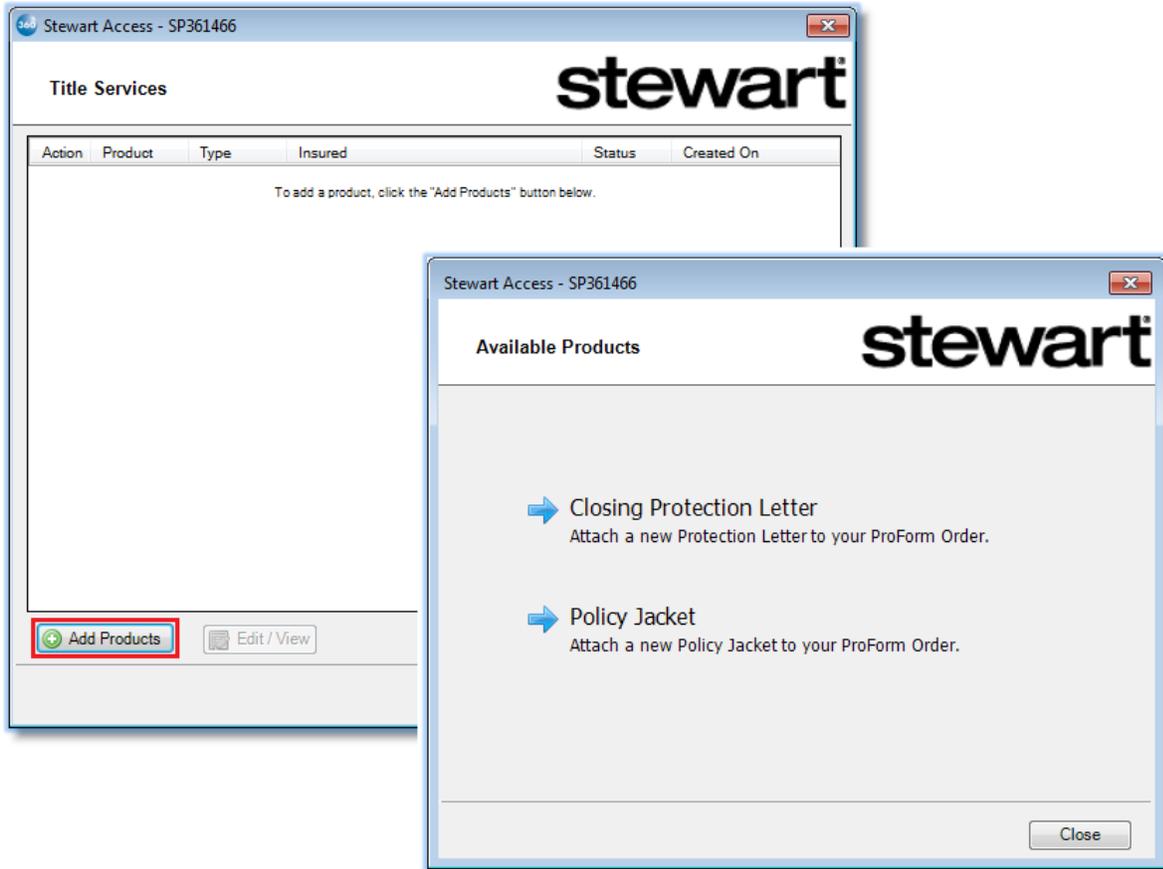
The **Title Services** screen will present a list of all **Stewart Access** products related to the Impact/SQL file. Closing protection letters and policy jackets may be ordered.



Clicking on the **File Information** button will display the relevant Impact/SQL file information on the **Information Sent to Stewart Access** screen. This data may be edited by the user, but **please note that edits made on the Information Sent to Stewart Access screen will NOT update the Impact/SQL file.** Click **OK** once the data is confirmed as correct.

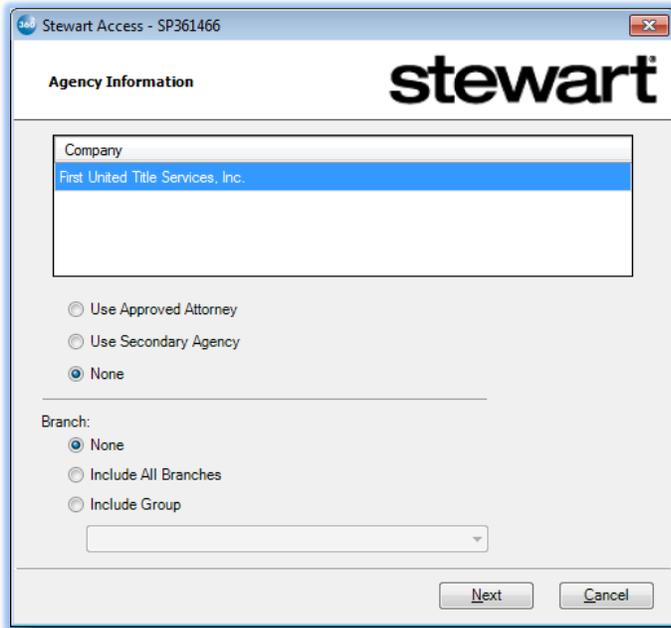


Click on the **Add Products** button to select which product to order. The **Available Products** screen will display and the user can select the desired product. Currently, only the **Closing Protection Letter (CPL)** product is available in Impact/SQL and will be discussed in the following pages.



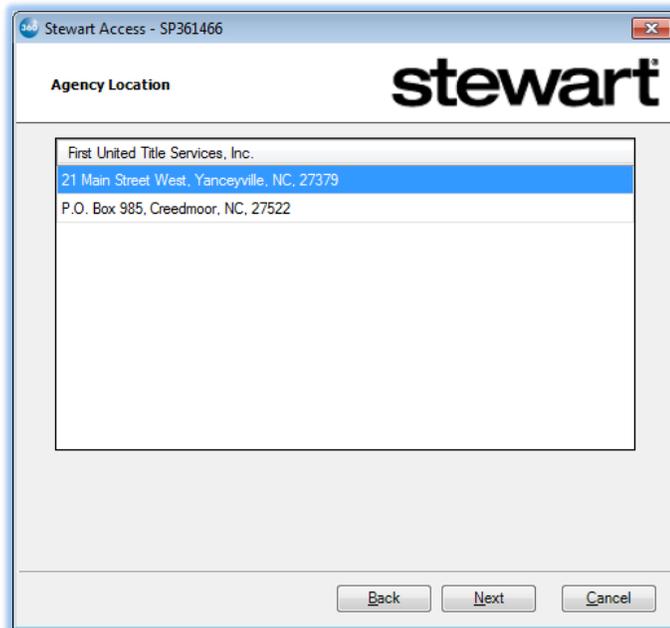
## Ordering a Closing Protection Letter (CPL)

To order a **Closing Protection Letter (CPL)**, click on that selection on the **Available Products** screen.



The **Agency Information** screen allows the user to select the agency or attorney from the list provided by Stewart Title Guaranty Company. Once the appropriate selections have been made, click the **Next** button to continue.

The **Agency Location** screen will allow the user to select the appropriate address for the agency previously selected. Clicking on the desired address will highlight the selection. Click the **Next** button to continue.



The **CPL Information** screen allows the user to select the type of Closing Protection Letter to request. Any field marked with a red asterisk \* will need to be completed before the user can continue. Clicking on the **Covered Party** drop down will present a list of parties from which to choose (**Buyer/Borrower**, **Lender** or **Seller**). The **Form Type** and **Property County** drop downs will also need to be used to complete the required information.

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**stewart**

CPL Information

First United Title Services, Inc. - 21 Main Street West, Yanceyville, ...

Covered Party:  \*

Form Type	--Select--	*
Property County	--Select--	*

Note: Edits made here will not update your ProForm Order.

Once all selections have been made, click **Next** to continue.

Stewart Access - SP361466

**stewart**

CPL Information

First United Title Services, Inc. - 21 Main Street West, Yanceyville, ...

Covered Party: Buyer/Borrower

Form Type	NC Insured Closing Services CPL Lender, Purchas...
Property County	Wake

Note: Edits made here will not update your ProForm Order.

If the Buyer/Borrower was selected as the Covered Party, the **Buyer/Borrower Information** screen will present. The Buyer name(s) and address will be pulled in from the Impact/SQL file. The data may be edited or additional data entered. **Please note that edits made on the Buyer/Borrower Information screen will NOT update the Impact/SQL file.**

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Buyer/Borrower Information **stewart**

Name 1:

Name 2:

Name 3:

Name 4:

Address:

City/State/Zip:

Note: Edits made here will not update your ProForm Order.

Likewise, if the Seller was selected as the Covered Party, the **Seller Information** screen will present. The Seller name(s) and address will be pulled in from the Impact/SQL file. The data may be edited or additional data entered. **Please note that edits made on the Seller Information screen will NOT update the Impact/SQL file.**

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## stewart

**Lender Information**

Lender Name:  Search

City, State, Zip: Phoenix AZ 85029

Source	Name	City
ProForm	Bank of the West	Walnut...

Selected Lender:  Loan No.: 123456789

Bank of the West Fax: (925) 256-1497

Mortgage Operations Center  Email:

Walnut Creek CA 94509 Attn: Manon Williams

Include Lender Successor Language:  Phone: (925) 975-3878

Include Secondary Lender

Note: Edits made here will not update your ProForm Order.

Back Submit Cancel

If the Lender was selected as the Covered Party, the **Lender Information** screen will present with the Impact/SQL file lender data pre-entered. Or, the user may search Stewart’s database of lenders by selecting a **State** from the drop down and then entering **two** or more of the following – **Lender Name**, **Lender City** or **Lender Zip Code** – then click the **Search** button. Any lender successor language that is necessary may be selected from the **Include Lender Successor Language** drop down. Any field with a **red asterisk \*** will need to be completed in order to continue. Once all data has been entered and confirmed, the user may click **Submit** to continue unless there is a Secondary Lender on the transaction. In this case, the user may select the **Include Secondary Lender** checkbox and then

click **Next** to proceed to the **Secondary Lender Information** screen.

The **Secondary Lender Information** screen is identical in look and functionality to the **Lender Information** screen. Like the previous screen, any second Lender data entered in the Impact/SQL Parties screen will be pre-entered. Once all data has been entered and confirmed, click **Submit** to continue.

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**Secondary Lender Information**

Lender Name:  Search

City, State, Zip: (None)

Source	Name	City
ProForm	Bank of the West	Walnut...
ProForm	Wells Fargo Home Mortgage	Phoenix

Selected Lender:  Loan No.: 689-98412

Wells Fargo Home Mortgage Fax: (602) 467-0608

630 E. Bell Road Email:

Phoenix AZ 85022 Attn: Sue Cantazaro

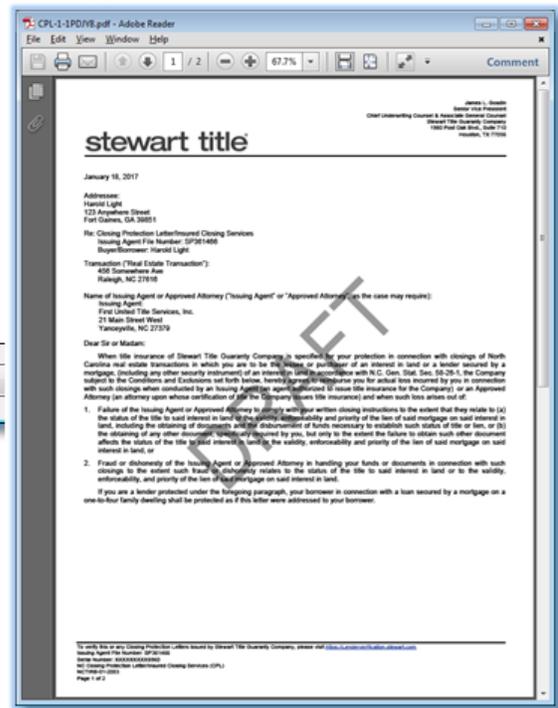
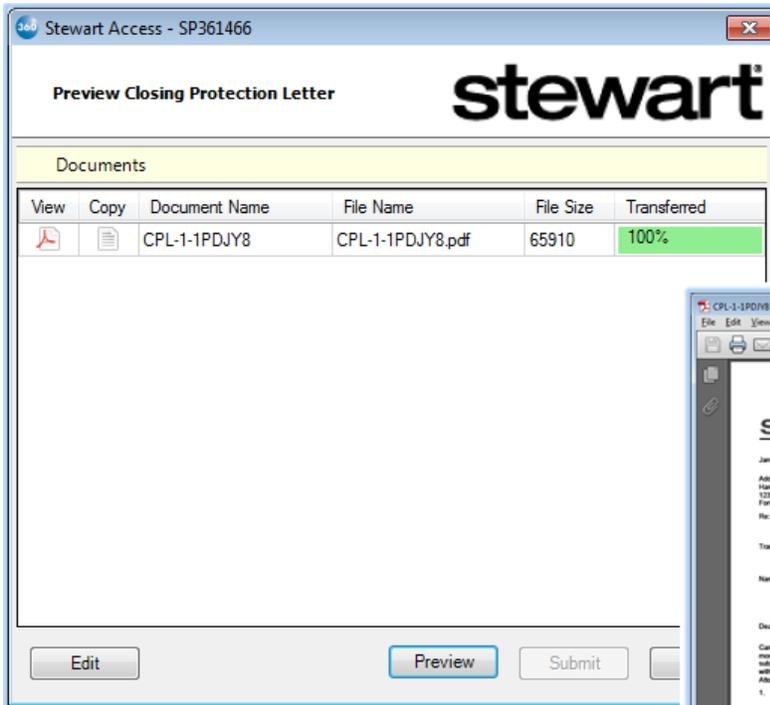
Include Lender Successor Language:  Phone: (602) 298-6772

Include Secondary Lender

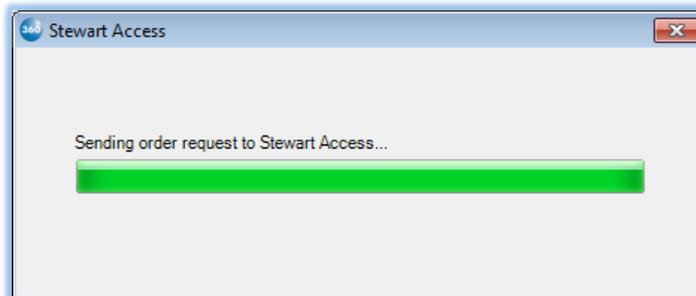
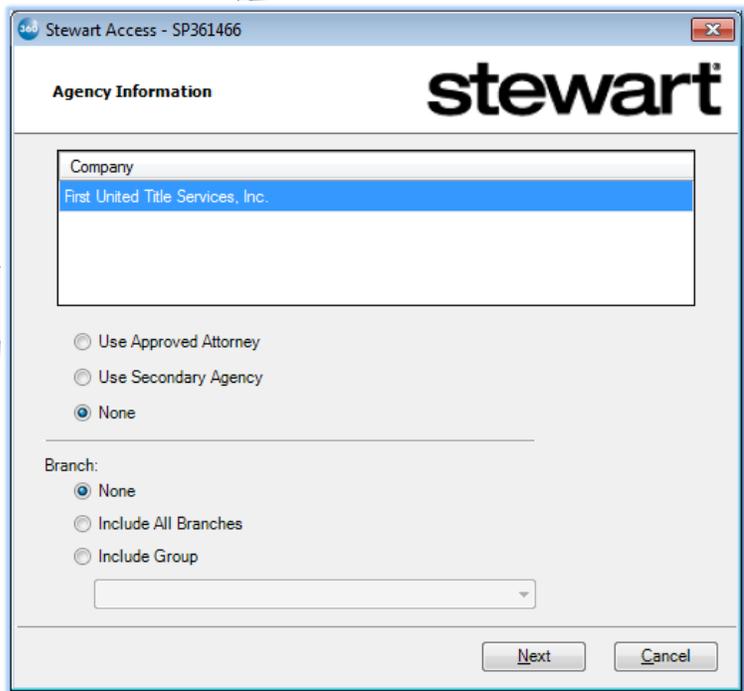
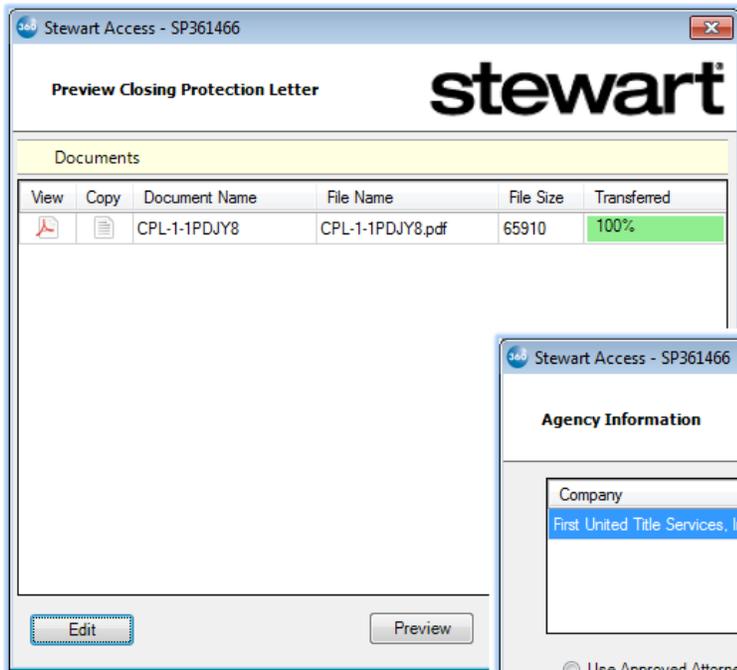
Note: Edits made here will not update your ProForm Order.

Back Submit Cancel

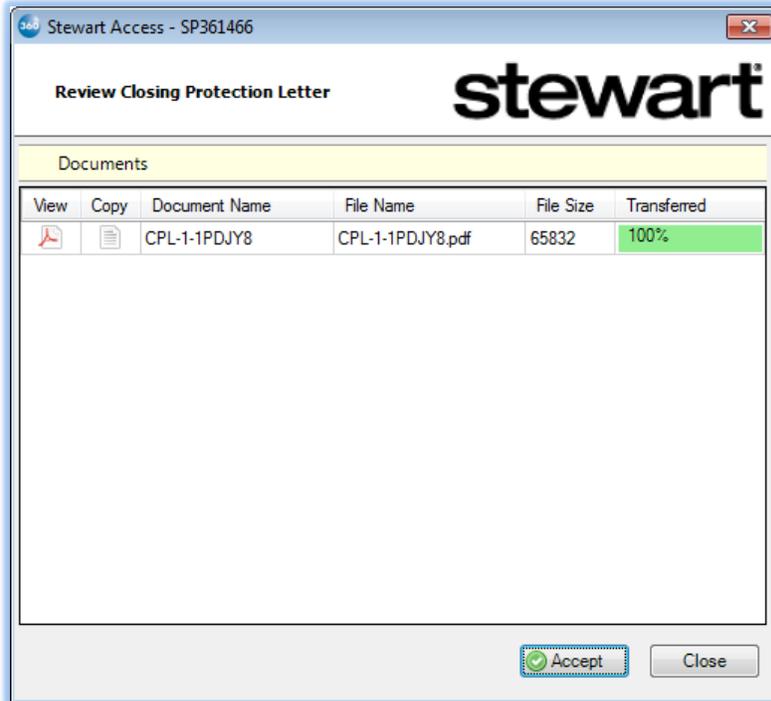
Stewart Access will not immediately return the Closing Protection Letter. The **Preview Closing Protection Letter** screen requires the user to preview a **draft** of the CPL by clicking on the **Preview** button. Once the draft has been previewed, clicking **Submit** will order the final version of the CPL.



Should the draft review reveal errors that need correcting, the user may click the **Edit** button to be returned to the initial entry screens, starting with the **Agency Information** screen. The user may click through the screens to find the data that requires editing, correct the data and **Submit** again for a new draft CPL. The user must then preview the new draft and then click **Submit** to order the final version of the CPL.

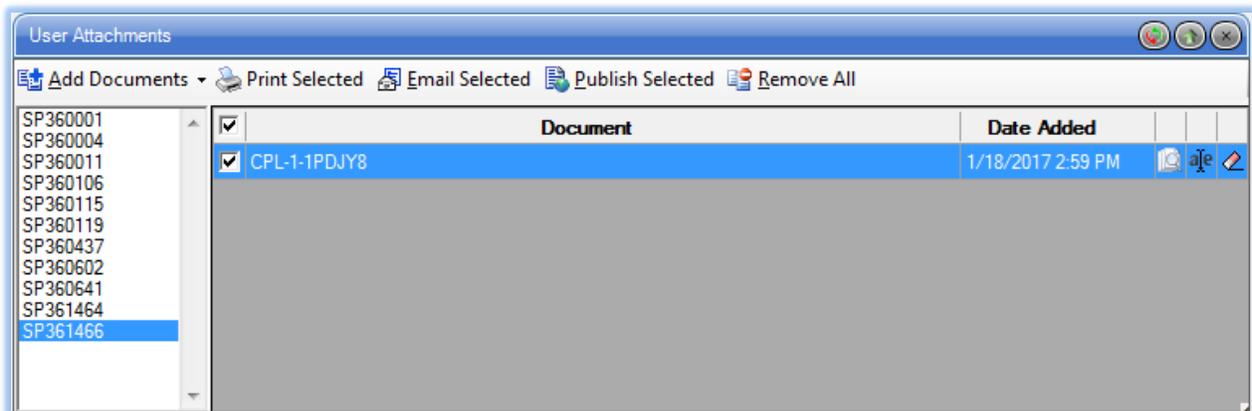


Click on **Accept** to add the CPL document to the Impact/SQL file.



## CPL Document Transfer to Impact/SQL

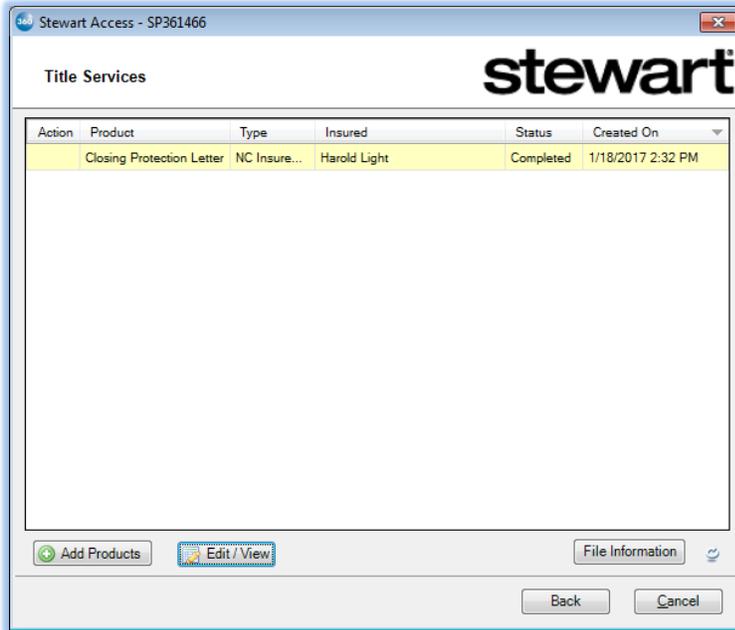
The CPL document will be available in the user's **User Attachments** widget. From there, the CPL may be printed, emailed or published to a document retention system.



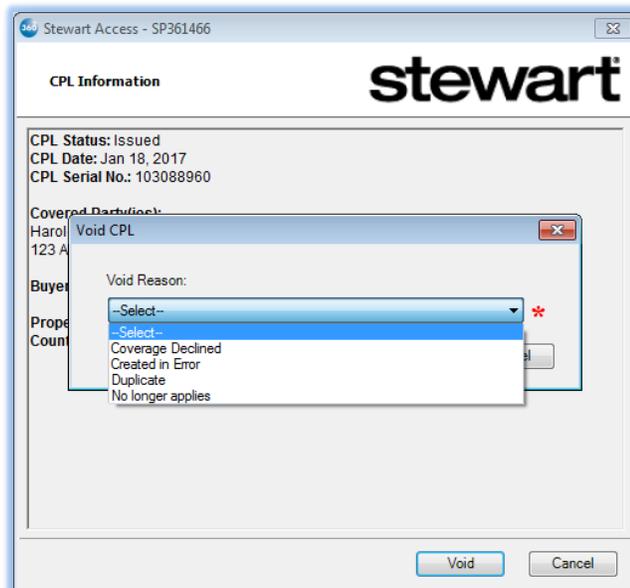
For databases that utilize a document retention system, users will typically receive a pop-up screen where they may send the CPL directly to that system.

## Voiding Stewart Access Products

If the product information needs to be voided, the user should log into the **Stewart Access** product from SoftPro 360. The **Title Services** screen will present with a read-only list of completed products. The user must highlight the desired entry and click **Edit/View**.



The **CPL Information** screen will display. Clicking **Void** will cause a **Void Reason** pop-up screen to appear. The user must choose a reason from the drop down, then click **Void** to complete the process.



When completed, the product will appear in the **Title Services** screen and the SoftPro 360 queue with a status of **Canceled**.

