



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.



Order Linking	
Open Order Numbers:	
SP361466	
Selected Order Number:	
SP361466	
OK Cancel	

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.

🕹 Stewart Access - SP361466 🛛 💽
Welcome stewart
At Stewart, our top priority is helping your business grow and helping you achieve your goals. Whether it's through our underwriting expertise, unbeatable service or innovative technology, we're committed to your success. We've decicated more than a century to enhancing the real estate transaction process. So rest assured, you have an underwriter with the financial strength to handle your largest commercial and residential deals. SoftPro's integration with Stewart Access provides: Instant and hassle-free ProductCpI and ProductJacket processing For Agencies who use SoftPro for their title production system, they can now produce a Stewart ProductCpI or ProductJacket without leaving SoftPro Funds from the lender are managed appropriately Stewart ensures that the lender is free from any liability
For additional information, please contact: Stewart Title Guaranty Company 1980 Post Oak Furd. Suite 800, Houston, TX 77056 Phone: 1-800-729-1900 Register an account
Skip Welcome Page Next Cancel

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.

Stewart Access - SP361466	
Login	stewart
	Provide your Stewart Access account information.
	User ID: usemame Password:
	Remember me
	<u>B</u> ack <u>N</u> ext <u>Cancel</u>

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.

Stewart	Access - SP	361466		etc	N∧/art
The s	Beivices	-		510	
Action	Product	Туре	Insured	Status	Created On
🕢 Add	Products	Edit / \	liew		File Information 🛫
				Bac	k <u>C</u> ancel

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 <u>please note that</u> <u>edits made on the Information Sent to Stewart Access screen will NOT update the Impact/SQL file.</u> Click **OK** once the data is confirmed as correct.

Stewart Access - SP361466		×			
Information Sent to St	ewart Access stewa	rť			
Property Type :	Single Family	•			
Property Address :	456 Somewhere Ave, Happy Acres, Raleigh, NC, 27616	•			
Lot :					
Block :					
Section :					
Subdivision :	Happy Acres				
PIN :	27616				
Property Brief Legal :	Lot(s) 1263, of Happy Acres, Map Book 205, Map Page 1200	* •			
Property Legal :		*			
Effective Date :	01/18/2017	-			
Note: Edits made here will not update your ProForm Order.					
	OK Car	ncel			

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.

🥹 Stewart Access - SP361466	x
Agency Information	stewart
Company	
First United Title Services, Inc.	
Use Approved Attorney	
Use Secondary Agency	
None	
Branch:	
None	
Include All Branches	
Include Group	
	· · · · · · · · · · · · · · · · · · ·
	<u>N</u> ext <u>Cancel</u>

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.

Stewart Access - SP361466	×
Agency Location	stewart
First United Title Services, Inc.	
21 Main Street West, Yanceyville, NC, 27379	
P.O. Box 985, Creedmoor, NC, 27522	
ſ	
	Pack Next Case

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.

🥹 Stewart Access - SP36146	6	×
CPL Information	stewar	ť
First United Title Services	s, Inc 21 Main Street West, Yanceyville,	
Covered Party:	-)*
Form Type	Select 🔻 🛠	
Property County	Select 👻 🛠	
Note: Edits made here will not u	update your ProForm Order. Back Next Cancel	

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



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. <u>Please note that edits made on the Buyer/Borrower Information</u> <u>screen will NOT update the Impact/SQL file.</u>

🥹 Stewart Access -	SP361466			—
Buyer/Borrowe	er Information	S	ste	wart
Name 1:	Harold Light			
Name 2:				
Name 3:				
Name 4:				
Address:	123 Anywhere Street			
City/State/Zip:	Fort Gaines		GA	39851
Note: Edits made here	will not update your ProFor	m Order.		
		<u>B</u> ack	Subm	it <u>C</u> ancel

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. <u>Please note that edits made on the Seller Information screen will NOT update</u> the Impact/SQL file.

🥹 Stewart Access - SP361466			x		
Lender Information	st	ewar	ť		
Lender Name:		Search]		
City, State, Zip: Phoenix	AZ 🔻	85029			
Source Name		City			
ProForm Bank of the West		Walnut			
Selected Lender: Bank of the West Mortgage Operations Center	Loan No.: Fax: Email:	123456789 (925) 256-1497			
Walnut Creek CA 94509	Attn:	Manon Williams			
Include Lender Successor Language:	Phone:	(925) 975-3878			
Its Successors And/Or Assigns As Their Interest May	Appear	•			
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 \star 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.

🥶 Stewart Access - SP361466	×				
Secondary Lender Information	vart				
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-	2 0608				
630 E. Bell Road Email:					
Phoenix AZ 85022 Attn: Sue Canta	azaro				
✓ Include Lender Successor Language: Phone: (602) 298-	6772				
Its Successors And/Or Assigns 👻					
Note: Edits made here will not update your ProForm Order.	<u>C</u> ancel				

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.

🔤 Stewart Ac	cess - SP361466			—	1
Preview	Closing Protection Let	er S	tev	vart	
Docume	its				
View Copy	Document Name	File Name	File Size	Transferred	
	CPL-1-1PDJY8	CPL-1-1PDJY8.pdf	65910	100%	
Edit		Preview	Submit		Hotek take (a) Control (a)

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.

🕹 Stev	vart Aco	cess - SP361466			×			
Pre	view C	losing Protection Let	tter S	tev	vart			
Do	cumen	ts						
View	Сору	Document Name	File Name	File Size	Transferred			
A	Đ	CPL-1-1PDJY8	CPL-1-1PDJY8.pdf	65910	100%			
				Stewa	rt Access - SP361466			
				Ager	ncy Information		stewa	art
				Co	mpany			
				First	t United Title Services,	Inc.		
E	dit	1	Preview					
) Use Approved Attorn	iev		
_				C) Use Secondary Ager	ncy		
				۲	None			
				Branc	h:			
				۲	None			
) Include All Branches)		
							Next	<u>C</u> ancel



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

🕹 Stewart Access - SP361466 🛛 💌									
Review Closing Protection Letter Stewart									
Do	cument	ts							
View	Сору	Document Name	File Name	File Size	Transferred				
A		CPL-1-1PDJY8	CPL-1-1PDJY8.pdf	65832	100%				
				() Accent	Close				
				Accept	Close				

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.

User Attachments								
🞼 Add Documents 🗸 😓 Print Selected 🕼 Email Selected 🗟 Publish Selected 😫 Remove All								
SP360001		Document	Date Added					
SP360011	Ŀ	CPL-1-1PDJY8	1/18/2017 2:59 PM	🔯 aje 🖉				
SP360106 SP360115								
SP360119 SP360437								
SP360602 SP360641								
SP361464 SP361466								
-	-							

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.

🥹 Stewart	Access - SP361466	ß
CPL In	formation	stewart
CPL Stat CPL Date CPL Seri	us: Issued :: Jan 18, 2017 al No.: 103088960	
Covered Harol Vo	Dartylioc): vid CPL	
Buyer	Void Reason:	
Prope Count	Select Select Coverage Declined	*
	Created in Error Duplicate No longer applies	
		Void Cancel
_		

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

🥶 Stewart Access - SP361466 🛛 💽								
Title	Services			ste	wart			
Action	Product	Туре	Insured	Status	Created On 🔍			
	Closing Protection Letter	NC Insure	Harold Light	Canceled	1/18/2017 2:32 PM			
🛈 Ado	d Products Edit	/ View		[File Information			
				Back	<u>C</u> ancel			

SoftPro 360										
💿 💿 🔄 🗐 Views: Active Order 🔽 🚖 New Product 🏔 🍸 Filter:										
(1)	(1) Active Order (243) New Transac (250) Ready Trans									
	Provider	Status	Linked Order	Created By	Created On		Service			
\$	Stewart	Canceled	SP361466	Scott Chance	01/18/2017 02:32 PM	Closing Protection Letter		🐺 O		