

Calyx Point

Integrated with Stewart

User Guide
August 4, 2022



Table of Contents

Introduction.....	3
Prerequisites	4
Username and Password Setup	4
Access to Email.....	4
Launching the Interface	5
Using Calyx Point	7
Logging In	7
Requesting Access	7
Placing an Order	9
Send Documents with Place Order	10
Send Messages with Place Order.....	12
Stewart Rate Calculator	14
Calculating Fees	14
Cancel Orders.....	17
Send Documents (Stewart)	18
Receive/Import Documents.....	20
Send Messages	21
Receive Messages.....	22
Technical or Transactional Support.....	23
Request Technical Support.....	23
Thank You.....	23

Introduction

This document walks you through how to use the *Stewart Title Company* interface within the *Calyx Point* application, to **Place Orders** and **Obtain Disclosure Fees**.

This integration between **Stewart** and **Calyx Point** allows users to place an order with **Stewart** and access *Stewart Rate Calculator* to calculate fees and transfer Calyx Point for display on the Fees Worksheet. In addition, users will be able to send/receive documents and messages with Stewart.

Deployment Date: August 4, 2022

Prerequisites

Username and Password Setup

An on-boarding process is required for lenders to be set up to use the *Stewart Title Company* interface in *Calyx Point*. Before this integration can be used, an account with Stewart must be created with the names of users who will use the integration. Your Stewart Representative will provide you with the necessary form, or you can access the form here – (Please link to the Lender Integration Page) as shown below to request access to this interface.

Access to Email

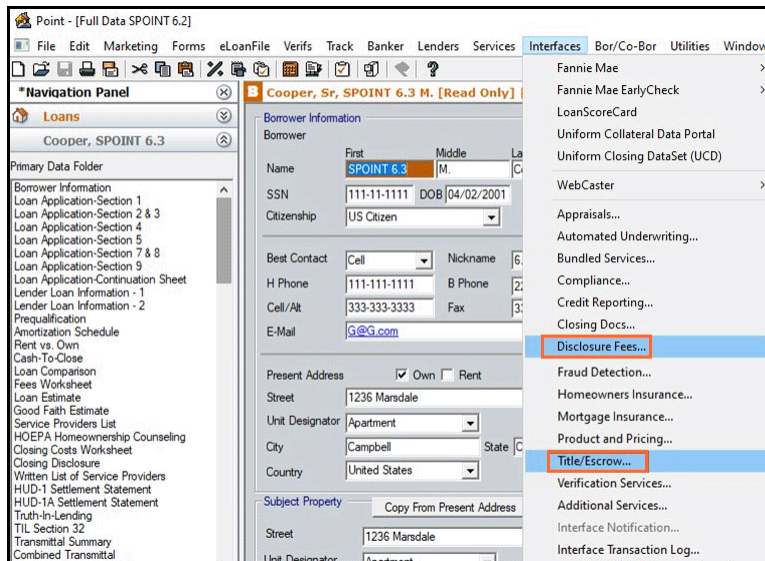
A *Desktop Email Client* application, such as **Microsoft Outlook** must be installed to use the [Request](#) links within the interface.

Launching the Interface

Once the integration is setup, you can import the fee data from **Stewart Rate Calculator** into **Calyx Point**.

Steps

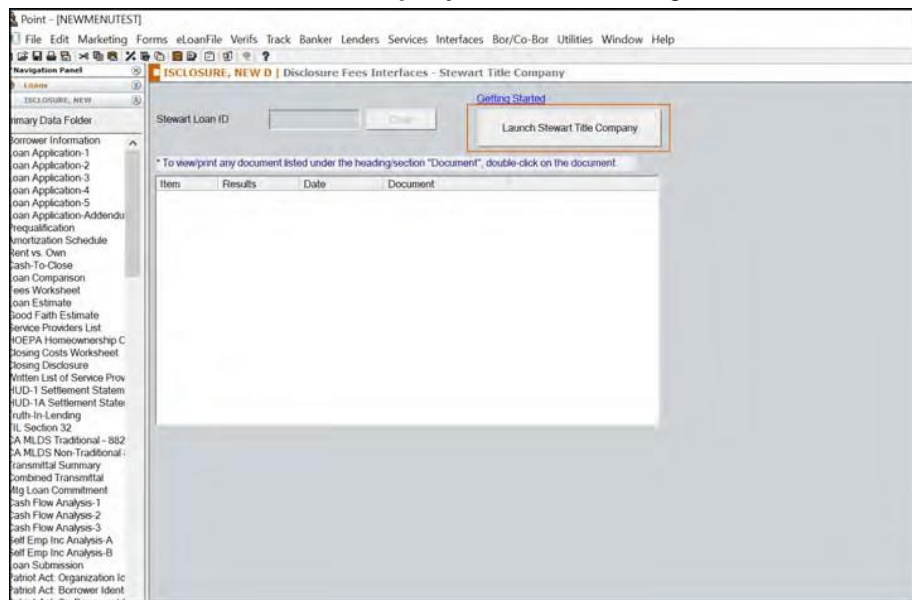
1. From the *Calyx Point* menu bar, click the **Interfaces** drop-down from the top menu.
2. Click **Title/Escrow** or **Disclosure Fees**.



3. From the *Title/Escrow Interfaces* pop-up, select **Stewart Title Company**. Click **OK**.



4. Click **Launch Stewart Title Company** to launch the integration screen. Place Order and Fee Quote Interface.



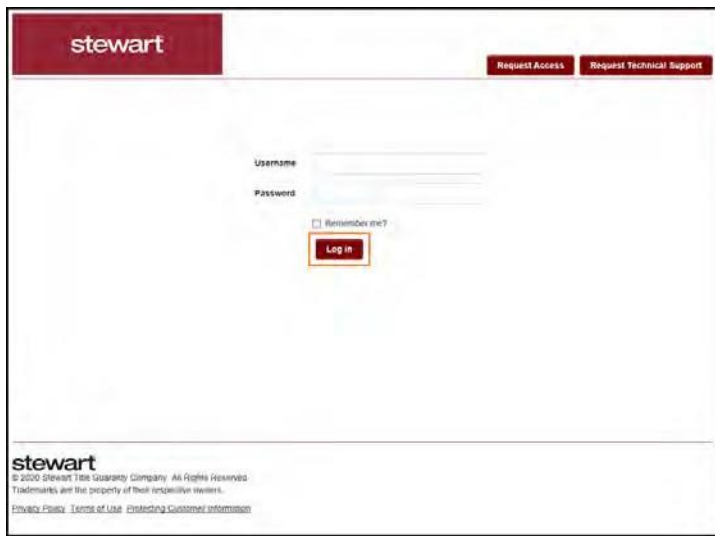
Using Calyx Point

Logging In

Use these steps to login to **Calyx Point**.

Steps

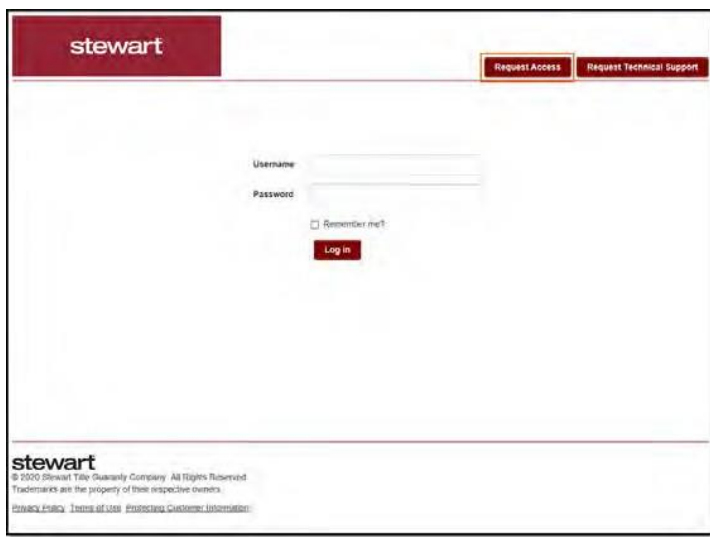
1. Enter your **Calyx Point** login credentials and then click **Login**.
2. (Optional) Select the *Remember Me?* checkbox to save the username for re-entry while your point session is active.




Requesting Access

Use the steps to request access to **Calyx Point**.

1. Click the **Request Access** button.



2. Outlook will open with the pre-populated information. Complete the remaining fields, and then click **Send**.

 Send	To	Lenderregistration
	Cc	
Subject Request Access for Calyx Point to Stewart integration		
<p>Please complete the following information to be setup as a Calyx Point to Stewart integration user.</p> <p>Stewart Representative Name: Stewart Representative Email:</p> <p>All below information is required:</p> <p>Is your company setup in Point as: Lender ____ Broker ____ Both ____</p> <p>Company Information: Name: Address:</p> <p>NMLS No. for COMPANY:</p> <p>Company Contact Name: Contact Phone Number:</p> <p>Users: (Please provide FullName, UserName and Email of each user. Passwords will be sent to all new users.) 1. 2. 3.</p>		

Placing an Order

With the interface open, complete the following steps to **Place Order** from the **Stewart Interface**.

Steps

1. Select **Stewart Title** in **Calyx Point**.
2. The Stewart Title landing page has the option to **Place an Order** or **Get Pricing Quotes**. The *Place Order* tab will be selected by default and some details of the loan will be visible.

Stewart Loan ID: 4ED7435B-88FA-430F-80D9-92762ADD8C06
Welcome calyxuser01 [Request Technical Support](#) [Log Out](#)

[Place Order](#) [Get Pricing Quote](#)

Messages
Please place order: [Get Pricing](#) [Place Order](#) [Cancel Order](#)

Office Information
Stewart Centralized Title Services
500 North Broadway
Suite 900
St. Louis MO 63102
844-473-5082

Borrowers
Borrower: SPOINT 77 Cooper
CoBorrower:

Property Information
Address: 213 Montgomery
Los Gatos CA
County: Santa Clara

Loan Information
Loan Number: 6021476564
Loan Type: FHA
Loan Purpose: Refinance
Loan Amount: 850000
Purchase Price:
Estimated Closing: 07/02/2021
Escrow File Number:

Documents [Add Document](#)
Name Date Status
No documents are available
[View](#) [Download](#) [Report to Calyx Point](#)

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Trademarks are the property of their respective owners.

Note: If you need help, you can view the **User Guide** located beside **Get Pricing** for support.

3. An order needs some mandatory information to process. If this information is missing from the loan details, an **error message** will appear on the top. Close the **Stewart Title** page and go back to **Calyx Point** to enter the missing information. Then re-launch the **Stewart Title** page again from **Calyx Point**.

Stewart Loan ID: 4ED7435B-88FA-430F-80D9-92762ADD8C06
Welcome calyxuser01 [Request Technical Support](#) [Log Out](#)

[Place Order](#) [Get Pricing Quote](#)

[Add Document](#) [Cancel Order](#) [Get Pricing](#) [User Guide](#)

Messages
Please place order: [Place Order](#) [Cancel Order](#)

Select Office
Stewart Centralized Title Services
500 North Broadway
Suite 900
St. Louis MO 63102
844-573-5082
☒ Centralized ☐ Local Office [Local Office](#)

Borrowers
Borrower: Dan R Cooper JR
CoBorrower:

Property Information
Address: 345 Bellaire
Los Gatos CA 95030
County: Santa Clara

Loan Information
Loan Number: 2020080027
Loan Type: Conventional
Loan Purpose: Purchase
Loan Amount: \$700,000.00
Purchase Price: \$800,000.00
Estimated Closing: 10/11/2020
Escrow File Number:

Documents [Add Document](#)
Name Date Status
No documents are available

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4. For **HELOC Loans**, additional steps are required:
 - When the **HELOC Indicator** is selected in Calyx Point

<input checked="" type="checkbox"/> Conventional <input type="checkbox"/> FHA <input type="checkbox"/> VA <input type="checkbox"/> USDA/RHS <input type="checkbox"/> Other	<input checked="" type="checkbox"/> Primary <input type="checkbox"/> Secondary <input type="checkbox"/> Investment Gross Rent <input type="text"/> Occ Rate <input type="text" value="75"/> %	<input checked="" type="checkbox"/> First Mtg <input type="checkbox"/> Second Mtg <input type="checkbox"/> Simultaneous Second <input checked="" type="checkbox"/> HELOC QM Finding QM Date and Time
--	---	--

- The Stewart Integration page shows **HELOC** as the Loan Type.
- Two new required options will appear:

stewart Loan Number: 4190 Account: CalyxVnr [Request Technical Support](#) [Close](#)

[Place Order](#) [Get Pricing Quote](#)

Messages
Please place order.

[Get Pricing](#) [Place Order](#) [Cancel Order](#)

[User Guide](#)

Select Office

Stewart Centralized Title Services
Stewart Title Guaranty Company
500 North Broadway
Suite 900
St. Louis MO 63102
844-573-5082

☒ Centralized
☐ Local Office

[Locate Office](#)

Borrowers

Borrower: Mianna Tapio
CoBorrower:

Property Information

Address: 77 83rd Ave N
Coon Rapids MN 55448
County: ANOKA

Loan Information

Loan Number: 4190

Loan Type: HELOC
☒ Insured ☐ Uninsured

Loan Purpose: Refinance
Loan Amount: 50000.00
Purchase Price:
Estimated Closing:
Escrow File Number:

[Documents](#) [Communications](#)

[Add Document](#)

Name	Date	Status
No documents are available.		

[View](#) [Download](#)

- **Insured** - Title Insurance is need on this loan
- **Uninsured** - Title Search Only (ie – Property Report, Owner & Encumbrance Report aka O&E, etc) – no Title Insurance

5. For **Reverse Loans**, additional steps are required:
 - For **Loan Type** in Calyx Point is *Other*

<input type="checkbox"/> Conventional <input type="checkbox"/> FHA <input type="checkbox"/> VA <input type="checkbox"/> USDA/RHS <input checked="" type="checkbox"/> Other	<input checked="" type="checkbox"/> Primary <input type="checkbox"/> Secondary <input type="checkbox"/> Investment Gross Rent <input type="text"/> Occ Rate <input type="text" value="75"/> %
---	---

- Stewart Integration Page shows *Other* as the **Loan Type**.
- A required option will appear:
 1. Select **Reverse** if Loan is a *Reverse Mortgage*

The screenshot displays the Stewart Integration Page. At the top, the Stewart logo is on the left, and the Loan Number (4190) and Account (CalyxVnr) are on the right, along with buttons for 'Request Technical Support' and 'Close'. Below the header, there are buttons for 'Place Order' and 'Get Pricing Quote'. A 'Messages' section contains a placeholder text 'Please place order.' and buttons for 'Get Pricing', 'Place Order', and 'Cancel Order'. A 'User Guide' link is also present. The main content area is divided into three sections: 'Select Office', 'Borrowers', and 'Loan Information'. The 'Select Office' section lists 'Stewart Centralized Title Services' and 'Stewart Title Guaranty Company' with a 'Locate Office' button. The 'Borrowers' section shows 'Borrower: Mianna Tapio' and 'CoBorrower:'. The 'Loan Information' section shows 'Loan Number: 4190', 'Loan Type: Other' (with 'Reverse' selected), 'Loan Purpose: Refinance', 'Loan Amount: 50000.00', 'Purchase Price:', 'Estimated Closing:', and 'Escrow File Number:'. Below these sections are 'Documents' and 'Communications' tabs. The 'Documents' tab shows an 'Add Document' button and a table with columns 'Name', 'Date', and 'Status'. The table is currently empty, displaying 'No documents are available.' and 'View' and 'Download' buttons.

Send Documents with Place Order

Use the steps below to send documents with **Place Order**:

Steps

1. In *Place Order*, click the **Documents** tab.
2. From the *Documents* tab, click the Caret Symbol ▼ to expand the screen. Click **Browse**.

Office Information

Stewart Centralized Title Services
500 North Broadway
Suite 900
St. Louis MO 63102
844-573-5092

Borrowers

Borrower: SPOINT 7.7 Cooper
CoBorrower:

Property Information

Address: 213 Montgomery
Los Gatos CA
County: Santa Clara

Loan Information

Loan Number: 8821478554
Loan Type: FHA
Loan Purpose: Refinance
Loan Amount: 850000
Purchase Price:
Estimated Closing: 07/30/2021
Escrow File Number:

Documents Communications

Add Document

Select Document *
Description

*Each document cannot exceed 20 MB

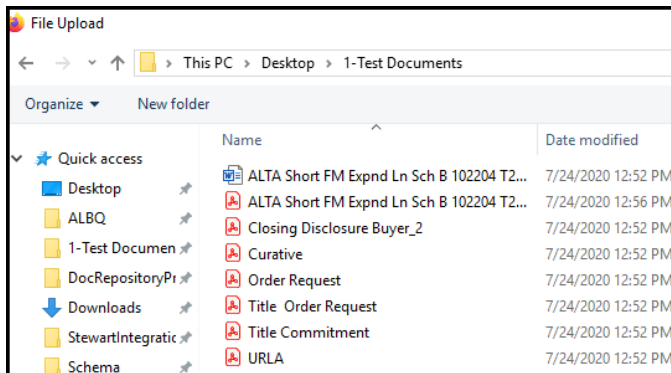
Send Document Clear

Name Date Status

No documents are available.

View Download Import to CalyxPoint

3. Select your document and enter the *Description* (optional). You must add a document before the order is initiated if you want the document to go with the Order.



4. Click **Send Document**.

Office Information Stewart Centralized Title Services 500 North Broadway Suite 900 St. Louis MO 63102 844-573-5082	Borrowers Borrower: SPOINT 7.7 Cooper CoBorrower:	Loan Information Loan Number: 6521478554 Loan Type: FHA Loan Purpose: Refinance Loan Amount: 850000 Purchase Price: Estimated Closing: 07/30/2021 Escrow File Number:
Property Information Address: 213 Montgomery Los Gatos CA County: Santa Clara		

Documents

Communications

Add Document

Select Document *

Browse...

Description

*Each document cannot exceed 20 MB

Send Document

Clear

Name	Date	Status
No documents are available.		

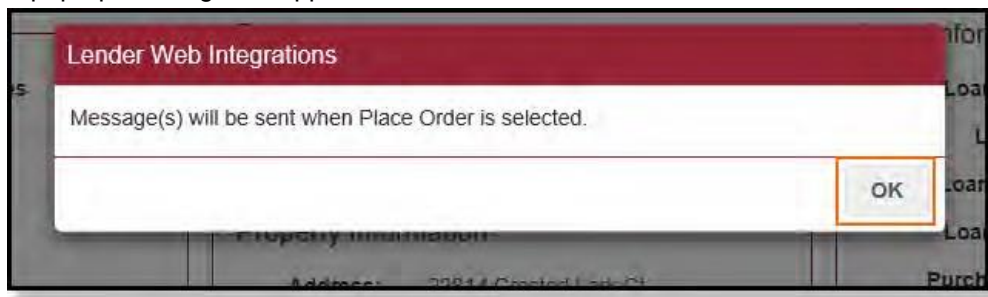
View

Download

Import to CalyxPoint

Note: Documents can also be sent after the **Escrow File Number** comes back.

1. A pop-up message will appear. Documents will be sent when **Place Order** is selected. Click **OK**.



- The status on the document screen will be set to **Pending (Place Order)** or **Pending (Escrow #)** until an escrow number comes back from Stewart.

The screenshot shows a web interface with two tabs: 'Documents' (active) and 'Communications'. Below the tabs is a red bar with 'Add Document' and a dropdown arrow. A table below has columns for 'Name', 'Date', and 'Status'. The first row shows 'Power of Attorney.pdf', '07/19/2021', and 'Pending (Place Order)'. At the bottom right are buttons for 'View', 'Download', and 'Import to CalyxPoint'.

Name	Date	Status
Power of Attorney.pdf	07/19/2021	Pending (Place Order)

Send Messages with Place Order

Use the steps below to send messages with **Place Order**.

Steps

- In *Place Order*, click the **Communications** tab.
- From the **Communications** tab, click the **Caret Symbol** ▼ to expand the screen. You must add a document before the order is initiated.
- In the *Subject* field, enter your subject. In the *Message* field, type in the message.
- Click **Send Message**.

The screenshot shows the 'Communications' tab active. Below it is a red bar with 'Add Message' and an upward arrow. The form has a 'Subject' field with 'RUSH' and a 'Message' field with 'Need Title Commitment by 9/1/20.'. At the bottom right are buttons for 'Send Message' and 'Clear'.

- A pop-up message will appear. Click **OK**.

The screenshot shows a pop-up message box with a red header 'Lender Web Integrations'. The message text says 'Message(s) will be sent when Place Order is selected.'. There is an 'OK' button at the bottom right.

- The **Status** on the Message screen will be set to **Pending (Place Order)** or **Pending (Escrow #)** until an **Escrow Number** comes back from ResWare.

Documents 1

Communications 1

Add Message ▾

Sender	Subject	Message	Date	Status
Lynn	RUSH	Need Title Commitment by 9/1/20.	08/27/2020 03:03:55 PM	Pending (Place Order)

View Message

- Once all details are finalized, you can now to place the order. Click on **Place Order**.
- The page will refresh, and you will receive an assigned escrow file number. This number will take some time to show up.

Stewart Rate Calculator

Calculating Fees

With the interface open, you have the option to **Calculate Fees** from the **Stewart Rate Calculator** and receive a quote.

Note: When calculating fees, the preferred browser for using the **Stewart Rate Calculator** is **Google Chrome**.

Steps

1. Click on the **Get Pricing Quote** or **Get Pricing** tab.

The screenshot shows the Stewart Rate Calculator interface. At the top, there's a header with the Stewart logo, a loan ID (4E07433B-88FA-430F-80D9-92762AD0BC06), and a welcome message (Welcome calyxuser01). Below the header, there are buttons for 'Place Order' and 'Get Pricing Quote'. The main content area is divided into several sections: 'Messages' (Please place order), 'Office Information' (Stewart Centralized Title Services, 500 North Broadway, Suite 900, St. Louis MO 63102, 844-975-0082), 'Borrowers' (Borrower: SPOINT 7.7 Cooper, CoBorrower:), 'Property Information' (Address: 213 Montgomery, Los Gatos CA, Country: Santa Clara), and 'Loan Information' (Loan Number: 6321478554, Loan Type: FHA, Loan Purpose: Refinance, Loan Amount: 850000, Purchase Price: 850000, Estimated Closing: 07/02/2021, Escrow File Number:). Below these sections, there are tabs for 'Documents' and 'Communications'. The 'Documents' tab is active, showing a table with columns for Name, Date, and Status. A message at the bottom of the table states 'No documents are available'.

2. The **Stewart Rate Calculator** screen displays with pre-populated information for *Property Location*; *Transaction Type*; *Loan Amount* and *Sales Price*. This was pre-populated according to the selected loan in **Calyx Point**.

The screenshot shows the Stewart Rate Calculator interface. At the top, there's a header with the Stewart logo, a loan ID (4E07433B-88FA-430F-80D9-92762AD0BC06), and a welcome message (Welcome calyxuser01). Below the header, there are buttons for 'Place Order' and 'Get Pricing Quote'. The main content area is divided into several sections: 'Messages' (Please place order), 'Office Information' (Stewart Centralized Title Services, 500 North Broadway, Suite 900, St. Louis MO 63102, 844-975-0082), 'Borrowers' (Borrower: SPOINT 7.7 Cooper, CoBorrower:), 'Property Information' (Address: 213 Montgomery, Los Gatos CA, Country: Santa Clara), and 'Loan Information' (Loan Number: 6321478554, Loan Type: FHA, Loan Purpose: Refinance, Loan Amount: 850000, Purchase Price: 850000, Estimated Closing: 07/02/2021, Escrow File Number:). Below these sections, there are tabs for 'Documents' and 'Communications'. The 'Documents' tab is active, showing a table with columns for Name, Date, and Status. A message at the bottom of the table states 'No documents are available'.

- Click **Create Estimate**. The *TRID Premiums, Endorsement Amounts, Title Service Fees, and Recording Fees/Transfer Taxes* can be imported into **Calyx Point**.

The screenshot shows a web interface with two main sections: 'Title Service Fees' and 'Recording Fees and Transfer Taxes'. Below these sections are two buttons: 'Create Estimate' and 'New Estimate'. The 'Create Estimate' button is highlighted with a red border.

- From the *Stewart Rate Calculator* screen, click **Download**.

The screenshot shows a 'Download' dialog box with fields for 'Name', 'Company', 'Email Address', and 'Note'. There is a 'Remember' checkbox and two buttons: 'Download' and 'Cancel'. The 'Download' button is highlighted with a red border.



IMPORTANT

For your records and to add other fees to Calyx Point, please click the **Download** button to save a copy of the quotes from the *Stewart Rate Calculator* to your local machine before exiting the screen.

- To import the **TRID Premiums, Endorsement Amounts, Title Service Fees, and/or Recording Fees/Transfer Taxes**, click on **Push Fees to Calyx**. Use the **PDF** copy of the quotes for your reference (if needed).
- A pop-up will display the **Current Value** of the fees in your loan and the **New Value** that will be imported. To import the new values into your loan, click **Yes**.

The screenshot shows a 'Loan Data Import' dialog box. It contains a table with columns 'Field Name', 'Current Value', and 'New Value'. The table lists various fees and their values. At the bottom, there is a 'Do not ask me again during this visit' checkbox and two buttons: 'Yes' and 'No'. The 'Yes' button is highlighted with a red border.

Field Name	Current Value	New Value
RESPA Fee GFE Disclosed Amount - H...		1167.00
RESPA Fee Required Provider Of Servic...		Stewart Title of C...
RESPA Fee Paid To Name - HUD line 1...		
RESPA Included In APR Indicator - HU...		
RESPA Allowable FHA Closing Cost Ind...		
RESPA Paid Outside Of Closing Indicat...		
RESPA Financed Indicator - HUD line 1...		
RESPA Fee GFE Disclosed Amount - H...	777.00	
RESPA Fee Required Provider Of Servic...		Stewart Title of C...
RESPA Fee Paid To Name - HUD line 1...		
RESPA Included In APR Indicator - HU...		
RESPA Allowable FHA Closing Cost Ind...		
RESPA Paid Outside Of Closing Indicat...		
RESPA Financed Indicator - HUD line 1...		
RESPA Fee GFE Disclosed Amount - H...	25.00	
RESPA Fee Item Description - HUD line...		Title - CLTA 110...
RESPA Fee Required Provider Of Servic...		Stewart Title of C...
RESPA Fee Paid To Name - HUD line 1...		
RESPA Included In APR Indicator - HU...		
RESPA Allowable FHA Closing Cost Ind...		
RESPA Paid Outside Of Closing Indicat...		
RESPA Financed Indicator - HUD line 1...		
RESPA Fee GFE Disclosed Amount - H...	136.70	
RESPA Fee Item Description - HUD line...		Title - CLTA 103...
RESPA Fee Paid To Name - HUD line 1...		Stewart Title of C...
RESPA Included In APR Indicator - HU...		

- Click **Exit Stewart Title Company** to exit the interface.

The screenshot shows the Stewart Title Company interface with a navigation bar containing buttons: 'Back', 'Forward', 'Refresh', 'Print', 'Save As', and 'Exit Stewart Title Company'. The 'Exit Stewart Title Company' button is highlighted with a red border.

8. From menu on the left, click **Fees Worksheet**.

File Edit Marketing Forms eLoanFile Verifs Track Banker Lenders

Navigation Panel

- Loans
 - Test, Maria T
 - Primary Data Folder
 - Borrower Information
 - Loan Application-1
 - Loan Application-2
 - Loan Application-3
 - Loan Application-4
 - Loan Application-5
 - Loan Application-Addendum
 - Prequalification
 - Amortization Schedule
 - Rent vs. Own
 - Cash-To-Close
 - Loan Comparison
 - Fees Worksheet**
 - Loan Estimate
 - Good Faith Estimate
 - Service Providers List
 - HOEPA Homeownership C
 - Closing Costs Worksheet
 - Closing Disclosure
 - Written List of Service Prov
 - HUD-1 Settlement Statem
 - HUD-1A Settlement State
 - Truth-In-Lending
 - TIL Section 32
 - CA MLDS Traditional - 882
 - CA MLDS Non-Traditional
 - Transmittal Summary

Test, Maria T | Title/Escrow Interfaces

<Company Loan ID 632BA204-9207-
Label>

* To view/print any document listed under the head

Item	Results	Date
StewartQu...		11/28/2018 11...

The imported data will display.

[illegible]

Cancel Orders

Use the steps below to cancel orders through **Stewart**:

Steps

1. In the **Place Order** tab, click **Cancel Order**.

The screenshot shows the Stewart loan portal interface. At the top, the Stewart logo is on the left, and the loan ID '4ED7433D-88FA-420F-80D3-82782A0D6596' and user name 'Welcome calyxuser01' are on the right. Below the header, there are tabs for 'Place Order' and 'Get Pricing Quote'. A message box says 'Thank you for your order! Escrow File Number is NSWREF21323326'. Below this, there are buttons for 'Get Pricing', 'Place Order', and 'Cancel Order'. The 'Cancel Order' button is highlighted with a red border. The main content area is divided into three sections: 'Office Information' (Stewart Centralized Title Services, 500 North Broadway, Suite 900, St. Louis MO 63102, 844-873-8082), 'Borrowers' (Borrower: SPOINT 7.7 Cooper, CoBorrower:), and 'Loan Information' (Loan Number: 6521478554, Loan Type: FHA, Loan Purpose: Refinance, Loan Amount: \$50000, Purchase Price: \$50000, Estimated Closing: 07/30/2021, Escrow File Number: NSWREF21323326). At the bottom, there are sections for 'Documents' and 'Communications'. The 'Documents' section shows a table with columns 'Name', 'Date', and 'Status'. The first row is 'Power of Attorney.pdf', '07/07/2021 07:40:17 PM', and 'Sent'.

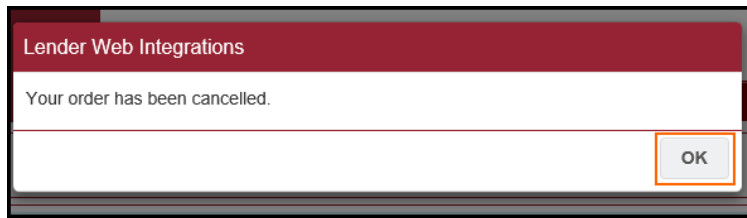
2. A pop-up message will appear which confirms if want to cancel the order. Click **OK**.

The screenshot shows a pop-up message box titled 'Lender Web Integrations'. The message text is 'Are you sure you want to cancel order? All existing document(s) and message(s) will be removed.' At the bottom right, there are two buttons: 'Cancel' and 'OK'. The 'OK' button is highlighted with a red border.

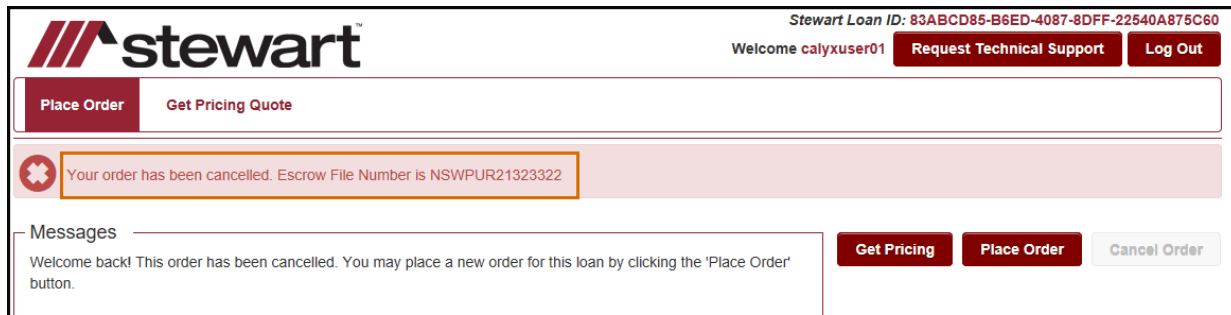
3. A **Cancel Order** window will appear. In the *Comments* field, enter your reason for cancellation. Click **Submit**.

The screenshot shows the 'Cancel Order' window. It has a red header bar with the text 'Cancel Order'. Below the header, there are fields for 'Property Address' (22814 Crested Lark Ct, Katy TX 77450), 'County' (HARRIS), 'Loan Number' (575144), 'Borrower' (Carol Snapka), and 'CoBorrower'. Below these fields, there is a 'Comments' field with a red asterisk and a text area containing 'Application Denied'. At the bottom right, there are two buttons: 'Submit' and 'Cancel'. The 'Submit' button is highlighted with a red border.

4. A pop-up window will display the message stating **Your order has been canceled**. Click **OK**.



5. In the **Place Order** tab, a message will display on the red bar confirming your order has been cancelled.



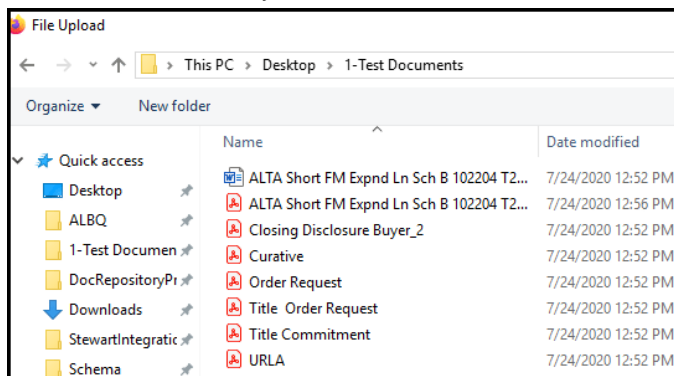
Note: Users may place an order again, if needed.

Send Documents (Stewart)

User the following steps to send documents to **Stewart**.

Steps

1. From the **Documents** tab, click the **Caret Symbol** ▼ to expand the screen.
2. Click **Browse**. Select your document and enter the description (optional).



3. Click **Send Document**.

Office Information Stewart Centralized Title Services 500 North Broadway Suite 900 St. Louis MO 63102 844-573-5082	Borrowers Borrower: SPOINT 7.7 Cooper CoBorrower: Property Information Address: 213 Montgomery Los Gatos CA County: Santa Clara	Loan Information Loan Number: 6521478554 Loan Type: FHA Loan Purpose: Refinance Loan Amount: 850000 Purchase Price: Estimated Closing: 07/30/2021 Escrow File Number:
--	---	---

Documents 4 **Communications** 1

Add Document ▲

Select Document *
 Description
 *Each document cannot exceed 20 MB

Name	Date	Status
No documents are available.		

4. A pop-up message will appear. Click **OK**.

Lender Web Integrations

Document has been sent.

5. The document status will be sent.

Documents 4 **Communications** 1

Add Document ▲

Select Document *
 Description
 *Each document cannot exceed 20 MB

Name	Date	Status
Tax Certificate_2.pdf	07/08/2021 09:06:01 PM	Imported
Loan Application.pdf	07/08/2021 10:00:18 PM	Sent
Title Commitment.pdf	07/08/2021 10:01:35 PM	Received
Deed.pdf	07/08/2021 05:18:00 PM	Sent

Receive/Import Documents

Use these steps below to receive and import documents from Stewart.

1. The document will appear in the **Documents** tab with a *Received* status.

The screenshot shows the 'Documents' tab in a web application. At the top, there are tabs for 'Documents' and 'Communications'. Below them is a section titled 'Add Document' with a 'Select Document' field and a 'Browse...' button. A 'Description' field is also present. A note states '*Each document cannot exceed 20 MB'. There are 'Send Document' and 'Clear' buttons. Below this is a table with columns 'Name', 'Date', and 'Status'. The table contains four rows: 'Tax Certificate_2.pdf' (Imported), 'Loan Application.pdf' (Sent), 'Title Commitment.pdf' (Received), and 'Deed.pdf' (Sent). The 'Received' status for 'Title Commitment.pdf' is highlighted with an orange box. At the bottom, there are 'View', 'Download', and 'Import to CalyxPoint' buttons.

Name	Date	Status
Tax Certificate_2.pdf	07/08/2021 09:06:01 PM	Imported
Loan Application.pdf	07/08/2021 10:00:18 PM	Sent
Title Commitment.pdf	07/08/2021 10:01:35 PM	Received
Deed.pdf	07/08/2021 05:18:00 PM	Sent

2. To import the *Received* document into **Calyx Point**, highlight the document you wish to import and click **Import to Calyx Point** button.
3. A pop-up appears. Click **OK**.

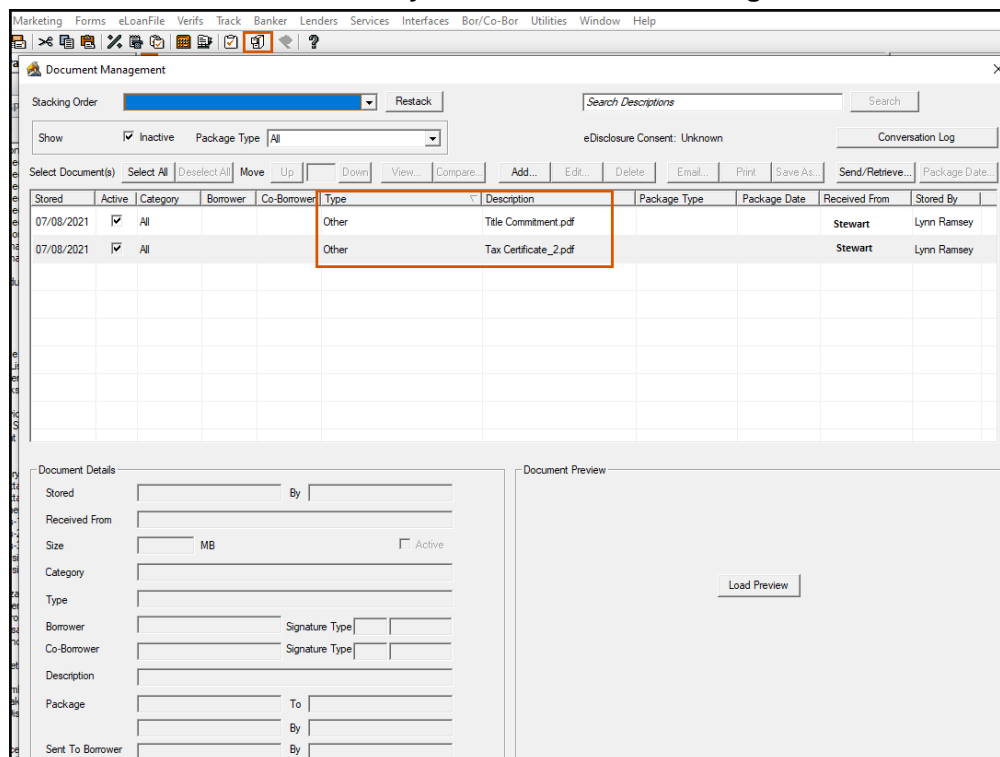
The screenshot shows a pop-up message titled 'Lender Web Integrations'. The message text reads: 'Point file has been successfully imported and document status is updated for Stewart Loan Id : C4A3BC68-C6BD-4302-801E-16E79E98CB7C'. There is an 'OK' button at the bottom right.

4. The document status displays *Imported*.

The screenshot shows the 'Documents' tab after the import. The 'Title Commitment.pdf' document now has a status of 'Imported', which is highlighted with an orange box. The 'Import to CalyxPoint' button is now visible at the bottom right of the table.

Name	Date	Status
Tax Certificate_2.pdf	07/08/2021 09:06:01 PM	Imported
Loan Application.pdf	07/08/2021 10:00:18 PM	Sent
Title Commitment.pdf	07/08/2021 10:01:35 PM	Imported
Deed.pdf	07/08/2021 05:18:00 PM	Sent

6. You can view the document in **Calyx Point's Document Management**.



Send Messages

Use the steps below to Send Messages after an order has been placed in **Stewart Integration**.

Steps

1. In the **Stewart Integration**, click the **Communications** tab.
2. From the **Communications** tab, click the **Carrot symbol ▼** to expand the screen.

Note: you must add a document before the order is initiated.

3. In the **Subject** field, type in a subject. In the **Message** field, type in a message.
4. Click **Send Message**.



- A pop-up window will appear stating **Message has been sent**. Click **OK**.



- The *Status* field in the *Message* screen will display the status.

Sender	Subject	Message	Date	Status
Calyx Point User	Test Msg 1	Sent with Place Order	07/16/2020 10:38:29 AM	Sent
Calyx Point User	Test Msg 2	Sent with Place Order	07/16/2020 10:38:30 AM	Sent
Calyx Point User	Test Msg for Order	Test Message after Order Sent	07/16/2020 12:37:30 PM	Sent

[View Message](#)

Receive Messages

Use the steps below to receive messages on orders through **Stewart**:

Steps

- In *Place Order*, click on the **Communications** tab.
- In the *Message* column, select the desired message.
- Click **View Message** to open the message.

Documents 6

Communications 5

Add Message

Sender	Subject	Message	Date	Status
User	Test Msg 2	Sent with Place Order	AM	Sent
Calyx Point User	Test Msg for Order	Test Message after Order Sent	07/16/2020 12:37:32 PM	Sent
Stewart	TEST to CP	TESTINGLynn RamseyLynn Ramsey@stewart.comESBResWare E2E Pre...	07/17/2020 10:29:17 AM	Received
Stewart	FW: Test RW to CP Action Note	Lynn RamseyLynn Ramsey@stewart.comESBResWare E2E PreProdpre...	07/17/2020 10:31:15 AM	Received

View Message

Technical or Transactional Support

For technical or transactional support click the links within the *Stewart Title Company* interface for assistance.



Important Note!

A *Desktop Email Client* application such as Microsoft Outlook must be installed to use the **Request Technical Support** link. Otherwise, please contact Stewart Customer Care for assistance at 1.877.800.3132 or CustomerCare@stewart.com.

Request Technical Support

For technical support questions, click **Request Technical Support** on the Login page to access *Stewart Customer Care* via email at CustomerCare@stewart.com. Technical Support can assist with questions regarding login and password information.

stewart

Request Access Request Technical Support

Username

Password

☐ Remember me?

Log in

stewart

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Thank You

We appreciate your business. We hope you find the *Stewart Title Company* interface easy to use for your needs. For further assistance, contact **Stewart Customer Care** at 1.877.800.3132 or CustomerCare@stewart.com.