

Managing Stewart Transactions in SoftPro 360

How to Submit a Transaction

Stewart, an underwriter that issues Closing Protection Letters can be found in the SoftPro360 Products menu under **Stewart – Stewart Access** in Underwriter Services.



If you already have ProForm order(s) open, they will be listed in the Order Linking dialog. The active order will be highlighted and entered in the Selected Order Number field. You have the ability to select from any of these orders, or you may choose to overwrite the Selected Order Number with an order that is not currently open. Click **OK** to continue.

rder Linking	
Open Order Nur	mbers:
2014020001	
2014020002	
L	
Selected Order	Number:
2014020001	
	OK Cancel

The Welcome screen provides you with information about **Stewart**. You may choose to skip this screen in the future by clicking on the **Skip Welcome Page** option. Click **Next** to continue.

lome	S	stewa	art
wart, our top priority is helping your business g nderwriting expertise, unbeatable service or inn ated more than a century to enhancing the real e writer with the financial strength to handle your	row and helping you achi ovative technology, we're state transaction proces largest commercial and r	ieve your goals. Whethe a committed to your succ is. So rest assured, you residential deals.	r it's through cess. We've have an
Instant and hassle-free CPL processing For Agencies who use SoftPro for their title prod leaving SoftPro Funds from the lender are managed appropriatel Stewart ensures that the lender is free from any	uction system, they can i y jiability	now produce a Stewart (CPL without
dditional information, please contact: art Title Guaranty Company Post Oak Blvd., Suite 800, Houston, TX 77056 e: 1-800-729-1900			
iter an account			

The Login screen requires you to enter your user ID and password provided by **Stewart**. The **Remember me** check box will allow you to automatically login the next time you launch this product. Click **Next** to continue.

Login	stewar	ť
	Provide your Stewart Access account information. User ID: <u>softprouser1@dev picdev loca</u> Password: <u>******</u> V Remember me	
	Back Next Can	cel

The Title Services screen will show all **Stewart** transactions related to this order. To order a Closing Protection Letter, click the green **Add CPL** icon.

Title	Services			S	te	war	ť
Action	Product	Туре	Insured	Amount	Status	Created On	
			l o add a product, clic	ok the "Add CPL" button below			
0	Add CPL	Edit /	View		<u> </u>	File Information	()
				Back		Can	el

The File Information Screen will show you the relevant information being sent to Stewart.

	015110119
Information Sen	tto Stewart Access stewart
Property Type	Single Family Dwelling
Property Address	73 W. Flagler Street, Dallas, TX, 33130
Property Brief Legal	
Property Legal	A§ ALL THAT CERTAIN tract or parcel of land and premises situate,
Note: Edits made he	re will not update your ProForm Order. OK Cancel
Note: Edits made he	re will not update your ProForm Order. OK Cancel

The Agency Information screen will allow you to select your Agency from the list provided by **Stewart**. Select the Agency then click **Next** to continue.

Agency Information	etewart I
	Stevvart
Name	
Northern Title Company	
C Use Approved Attorney	
O Use Approved Automey	
 Use Secondary Agency 	
None	
Branch:	
None	
Include All Branches	
Include Group	
	Next Cancel

The CPL Information screen will allow you to select the type of Closing Protection Letter you want to request. To select the Covered Party, use the **Covered Party** dropdown to select from **Buyer/Borrower**, **Lender**, or **Seller**. Click **Next** to continue.

CPL In	formation		stev	Nar	ť
Covere	ed Party:			•	*
Form	Туре	Select		• *	
Prope	rty County	Dallas		•	
lote: Edits r	nade here will n	ot update your ProForm Or	der.		
			Back Next	Cancel	

If you have Selected **Buyer/Borrower** for your Covered Party, you will be presented with the Buyer/Borrower Information screen. The Buyer's name(s) and address will be defaulted from your ProForm Order.

Buyer/Borrow	er Information	S	τε	wa	rτ
Name 1:	Bob P. Buyer				
Name 2:					
Name 3:					
Name 4:					
Address:	123 Common Drive				
City/State/Zip:	Meriden		СТ	06417	
: Edits made here	e will not update your ProFo	orm Order.			
Edits made here	e will not update your ProFo	orm Order.			

You may edit the data in these fields or add additional Buyers/Borrowers as you need to.

If you have Selected **Seller** for your Covered Party, you will be presented with the Seller Information screen. The Seller's name(s) and address will be defaulted from your ProForm Order.

Seller Informa	tion	S	te	war
Name 1:	Smith P Smith			
Name 2:				
Name 3:				
Name 4:				
Address:	73 W. Flagler Street			
City/State/Zip:	Dallas		TX	33130
te: Edits made here	e will not update your ProF	orm Order.		
		Back	Submi	t Cancel

You may edit the data in these fields or add additional Sellers as needed.

The Lender Information screen will show the Lender information from your ProForm Order as well allow you to **search** Stewart's database of lenders. You can search by entering the State of the Lender and one or more of the following, Lender Name, Lender City or Lender Zipcode.

Lender In	formation		st	ewar	t
Lender Na	me: chase			Search	
Source	Name			City	
ProForm SA	Chase Manhattan Bank Chase Home Finance [NE	W YORKJ		Houston New Y	
Selected L	ender:		Loan No.:	[*
Chase Mar	nhattan Bank		Fax:	<u></u>	
20E Green	way Plaza		Email:	email@softprocorp.com	
Houston	TX	77046	Attn:	SP360v2 testcust1 testcus	t
Include Lend	ler Successor Language:		Phone:	(555) 555-5555	
				-	
Include Seco	ondary Lender				
Note: Edits mad	e here will not update you	r ProForm Or	der.		

You may also select the appropriate Lender Successor Language if available in the appropriate dropdown. Should you wish to include a Secondary Lender, you can check **Include Secondary Lender** checkbox to proceed to the Secondary Lender Information screen.

Secondary Lender Information	st	ewar	ť ľ
Lender Name:		Search	M
City, State, Zip:	(None) 💌		
Source Name		City	*
ProForm Chase Manhattan Bank		Houston	
Selected Lender: Chase Manhattan Bank 20E Greenway Plaza Houston TX	Loan No.: Fax: Email: 77046 Attn:	() email@softprocorp.com SP360v2 testcust 1 testcust	*
Include Lender Successor Language:	Phone:	(555) 555-5555	
		-	
Note: Edits made here will not update your F	ProForm Order.		

Once you have selected the appropriate lender(s) and the appropriate options, and click ${\mbox{Submit}}$ to continue.

Stewart Access will not immediately return the Closing Protection letter. The Preview Closing Protection Letter screen allows you to view the **draft** of the CPL.

	Preview	Closing Protection Le	tter S	tev	vart
Acti	Docume	nts			
- 11	View Copy	Document Name	File Name	File Size	Transferred
- 11		CPL-1-1CTVSF	CPL-1-1CTVSF.pdf	81594	100%
6			Praview	Cubmit	
	Edit		Preview	Submit	Close

Click **Preview** to review the draft of the CPL. Once reviewed, you can click **Submit** to order the final version of the CPL.

20	Stewart Access - 2015110119
	Preview Closing Protection Letter Stewart
	Documents
	Stewart Access
	Sending order request to Stewart Access
	Edit Preview Submit Close
-	Dack Cancel

On the Review Closing Protection Letter screen, click **Accept** to add the document to your ProForm order.

If you do not accept the document and close the review screen, you can review and accept the transaction later by clicking on the hyperlink in the Product column on the Title Services screen.



CPL Document Transfer to ProForm Order

The document(s) will be available to all Standard and Enterprise users from within the ProForm order via the **SPImage** icon located on the ProForm Menu bar (a SPImage license is not required to access SPImage. SPImage will become unlocked for the order once a document is Accepted into the order via SoftPro 360).



For Select users, the document(s) will be available by clicking on the Attachments & Document History link located in the documents tab.

Image: Checklist Tasks Requested Tasks My Screens Image: Checklist Tasks Image: Checklist Tasks	ProForm F	ProTrust Pro 109	9 SPImage	SPAdmin 360	Order			
Quick Links Documents Actions Workflow	egister Checklist Tasks	Requested Tasks	Notes	History Documents	Attachments	Document History	 Apply Template Overlay Order Rename Order 	Submit
		Quick Links			Docum	ents	Actions	Workflow

Voiding Stewart Access Products

If the Product information needs to be voided, highlight the product to be voided and click **Edit/Void**. The CPL Information screen will appear and will contain a read only list of the product information.



If you choose **Void**, a pop-up Void CPL dialog will appear.

CPL Information	stewart
CPL Status: Issued	
CPL Date: Nov 3, 2015 CPL Serial No.: 182015786	
Cove Void CDI	
New New	
Chas Void Reason:	
Hous No longer applies	_
Prop	Void Cancel
Prop County, promos	
-	
	Void Cancel

You can select from the available reasons presented in the **Void Reason** drop down as to the reason for voiding/canceling the CPL. When completed, the product will appear in the Title Services window as Canceled.

Title	Services			S	stev	war	ť
Action	Product	Туре	Insured	Amount	Status	Created On	-
	Closing Protection Letter	TX T-50 In	Chase Manha		Completed	11/3/2015 9:25 AM	
	Closing Protection Letter	TX T-50 In	Chase Home		Canceled	11/3/2015 9:23 AM	
		View			ſ	File Information	~
	Add CPL	View				File Information	D)