///^stewart

Calyx Point
Integrated with Stewart
User Guide
July 23, 2021

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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: July 23, 2021

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.
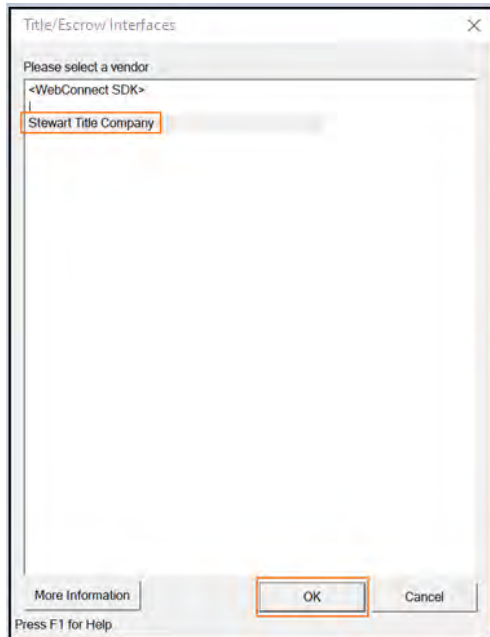
Launching the Interface

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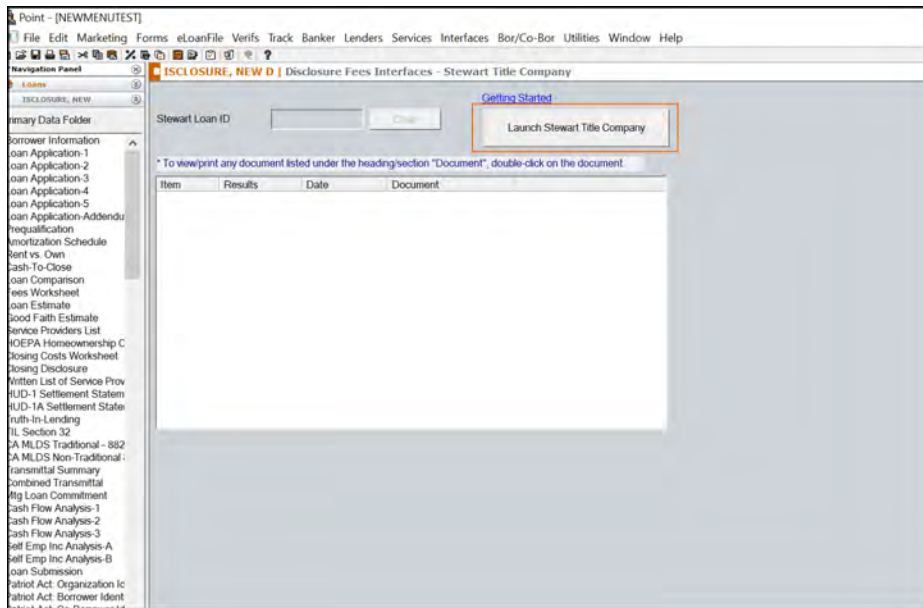
Steps

1. From the *Calyx Point* menu bar, click the **Interfaces** drop-down from the top menu.
2. Click **Title/Escrow** or **Disclosure Fees**.
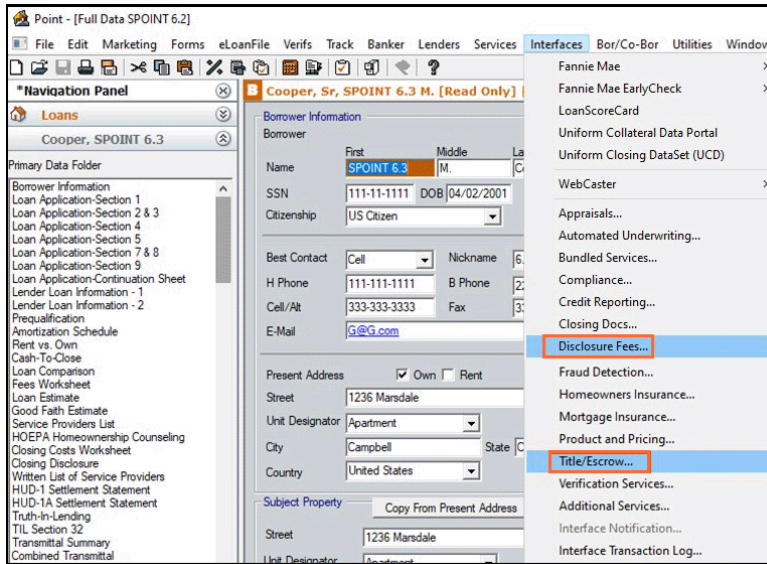
3. From the *Title/Escrow Interfaces* pop-up, select **Stewart Title Company**. Click **OK**.

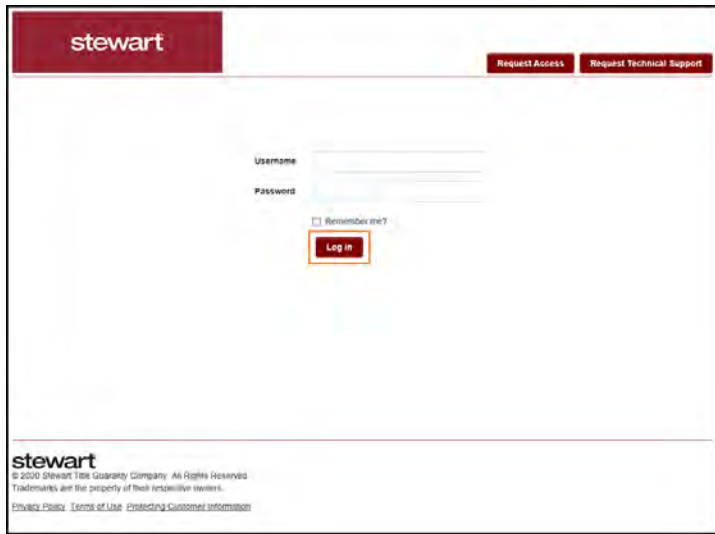4. Click **Launch Stewart Title Company** to launch the integration screen. Place Order and Fee Quote Interface.

Using Calyx Point

Logging In

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

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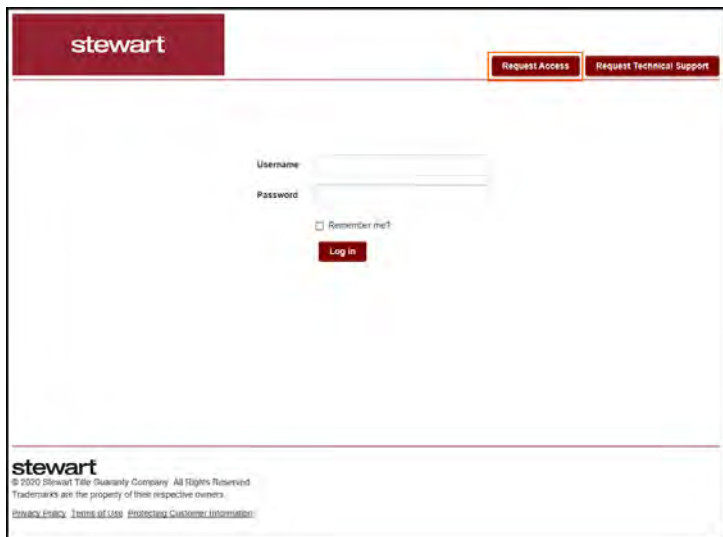
1. Enter your **Calyx Point** login credentials and then click **Login**.
2. (*Optional*) Select the *Remember Me?* checkbox to save the username for re-entry while your point session is active.

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

Please complete the following information to be setup as a Calyx Point to Stewart integration user.

Stewart Representative Name:
Stewart Representative Email:

All below information is required:

Is your company setup in Point as:
Lender ____ Broker ____ Both ____

Company Information:
Name:
Address:

NMLS No. for COMPANY:

Company Contact Name:
Contact Phone Number:

Users: (Please provide FullName, UserName and Email of each user. Passwords will be sent to all new users.)
1.
2.
3.

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.

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**.

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**.

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.
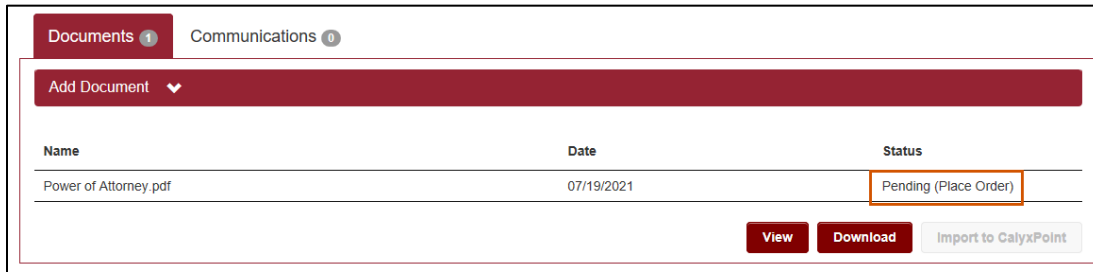
4. Click **Send Document**.

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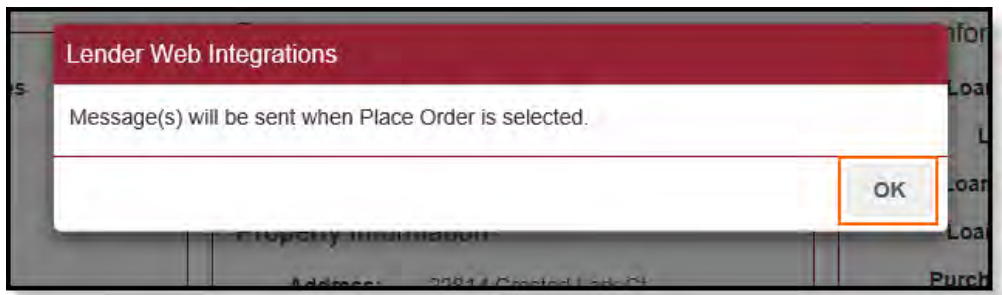
2. The status on the document screen will be set to **Pending (Place Order)** or **Pending (Escrow #)** until an escrow number comes back from Stewart.
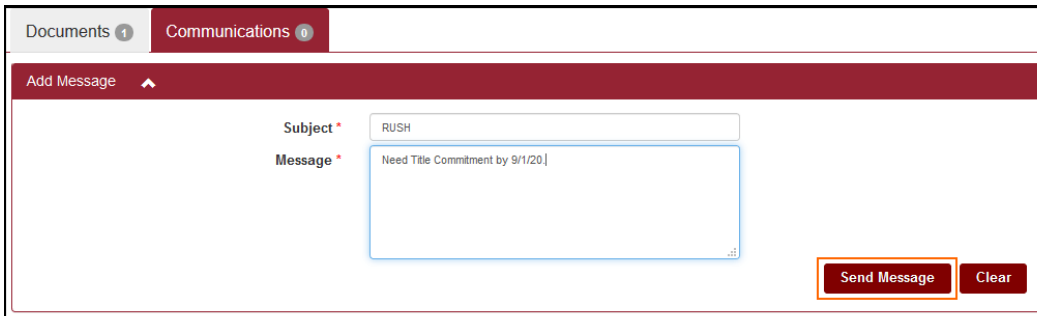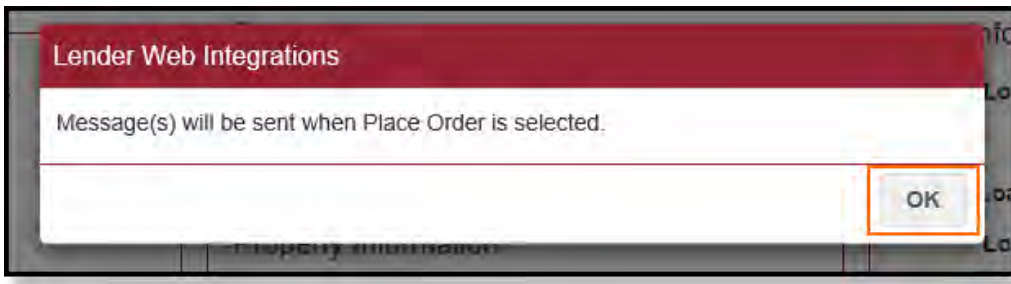

Send Messages with Place Order

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

Steps

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

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

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

7. Once all details are finalized, you can now to place the order. Click on **Place Order**.

8. The page will refresh, and you will receive an assigned escrow file number. This number will take some time to show up.
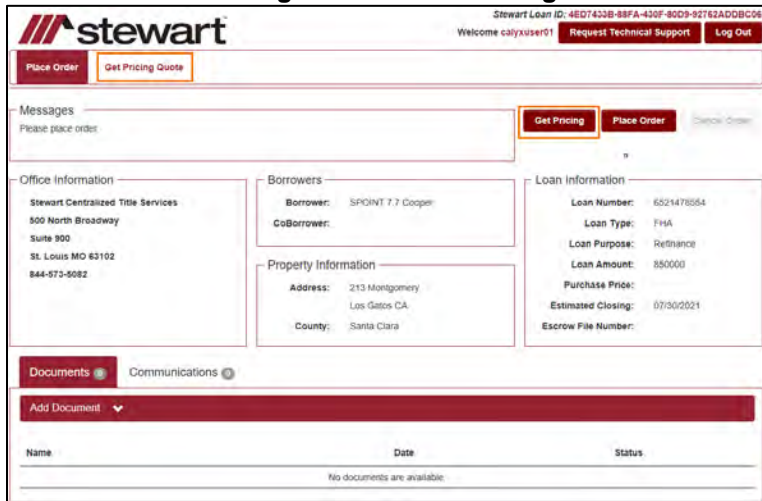
Stewart Rate Calculator

Calculating Fees

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

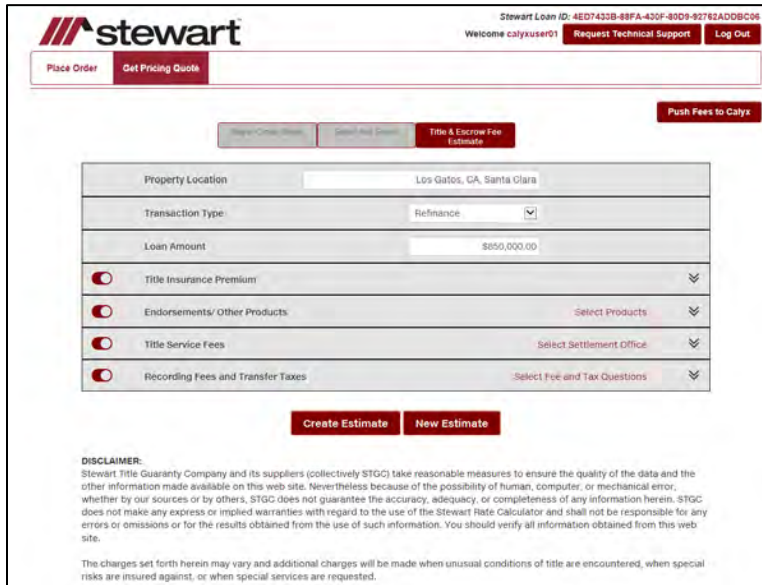**Note**: When calculating fees, the preferred browser for using the **Stewart Rate Calculator** is **Google Chrome**.

Steps

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

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**.

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


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

 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.

5. 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).

6. 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**.
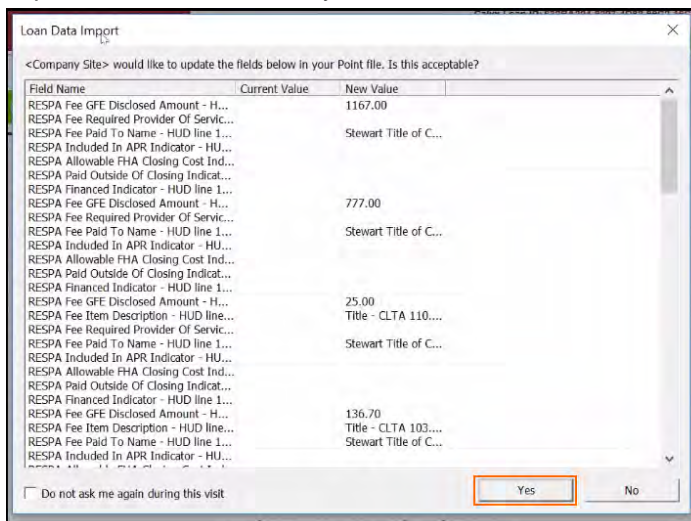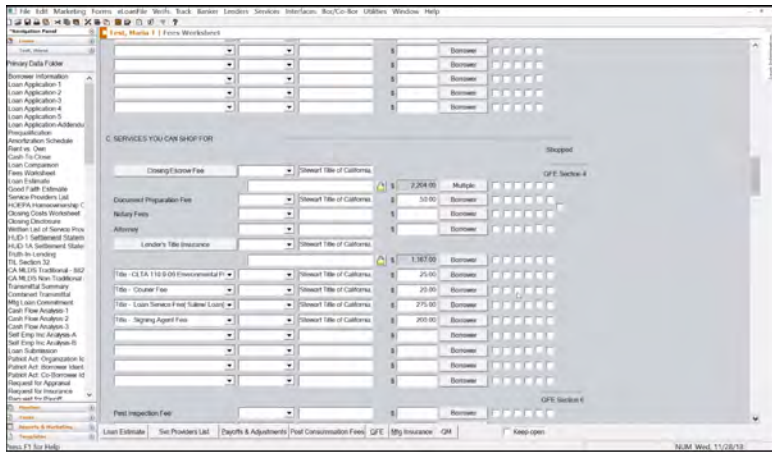

7. Click **Exit Stewart Title Company** to exit the interface.
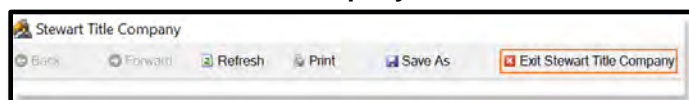
8. From menu on the left, click **Fees Worksheet**.
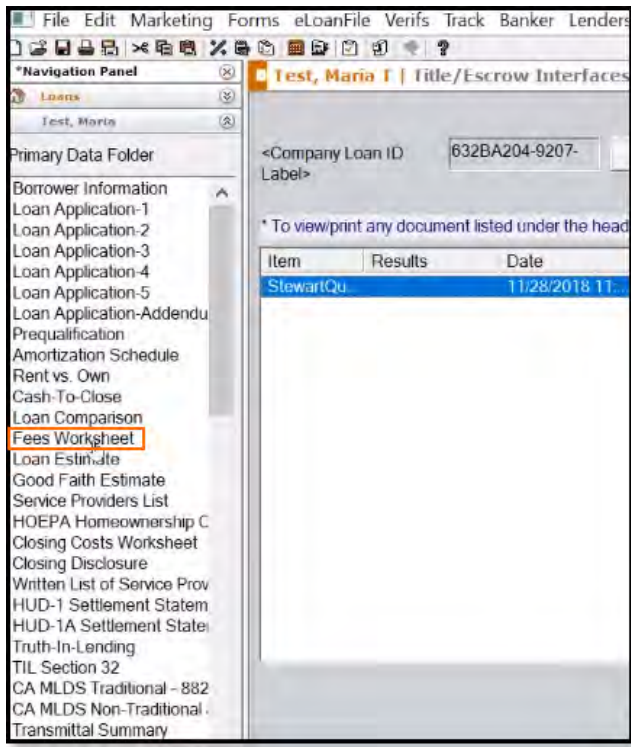
The imported data will display.

Cancel Orders

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

Steps

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

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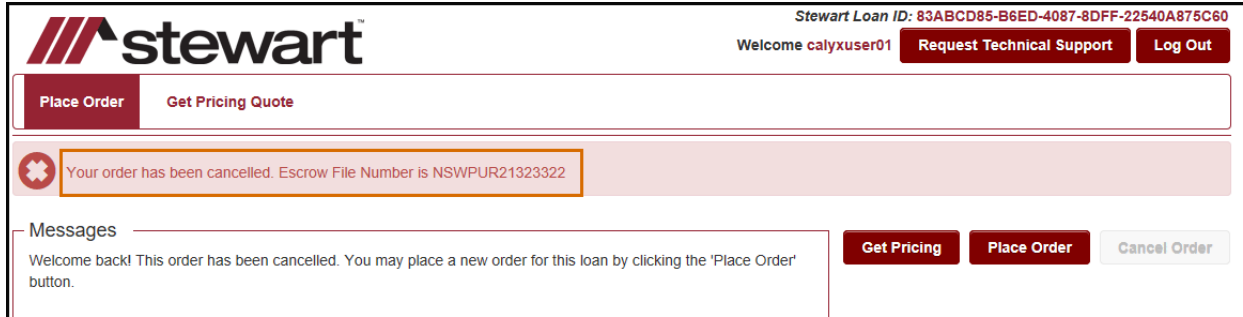

3. A **Cancel** Order window will appear. In the *Comments* field, enter your reason for cancellation. Click **Submit**.

4. A pop-up window will display the message stating **Your order has been canceled**. Click **OK**.
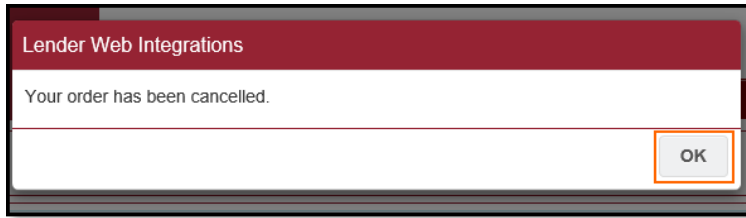
5. In the **Place Order** tab, a message will display on the red bar confirming your order has been cancelled.

Note: Users may place an order again, if needed.
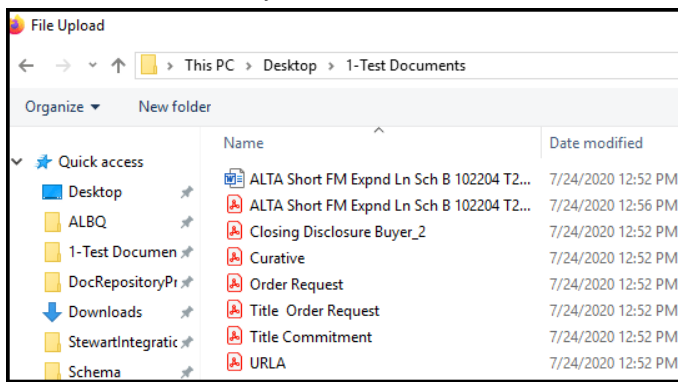
Send Documents (Stewart)

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**.

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

5. The document status will be 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.
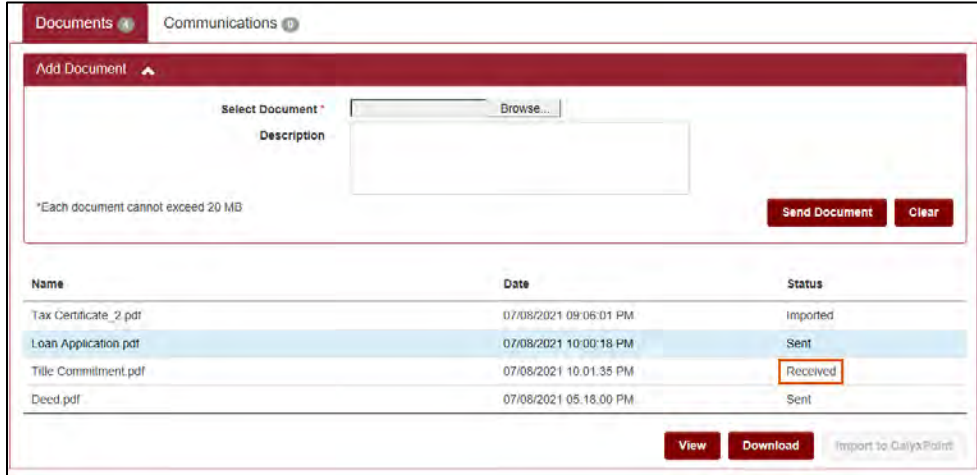
2. To import the *Received* document into **Calyx Point**, highlight the document you wish to import and click **Import to Calyx Point** button.

3. A pop-up appears. Click **OK**.

4. The document status displays *Imported*.
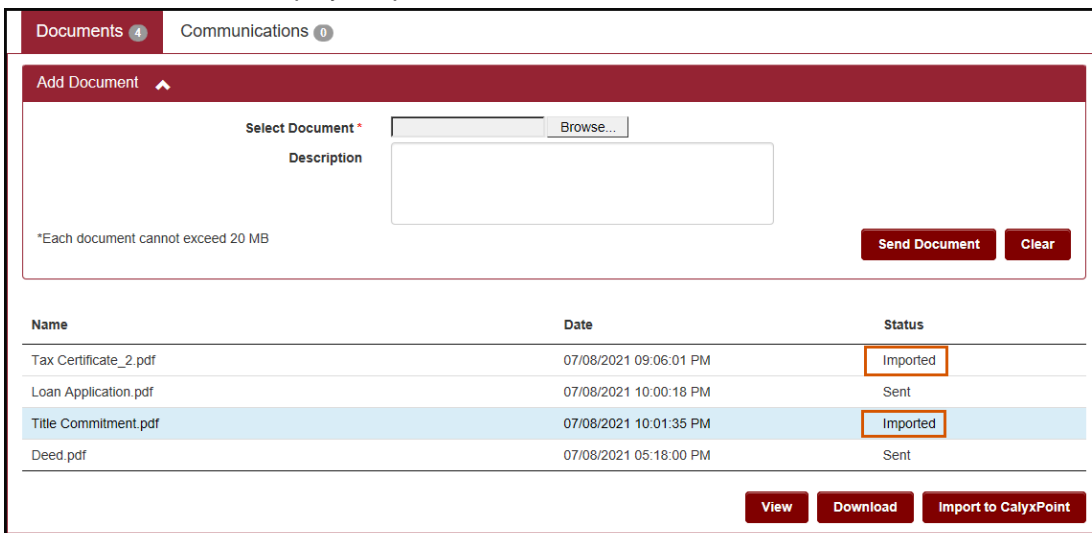
6. You can view the document in **Calyx Point's Document Management**.
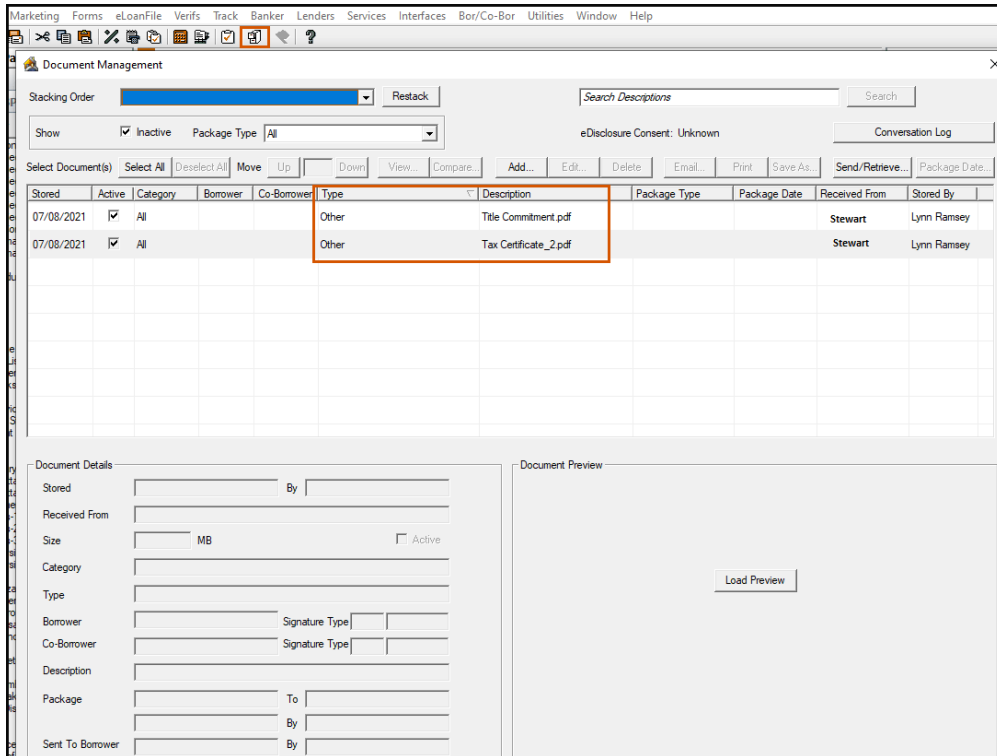
Send Messages

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.
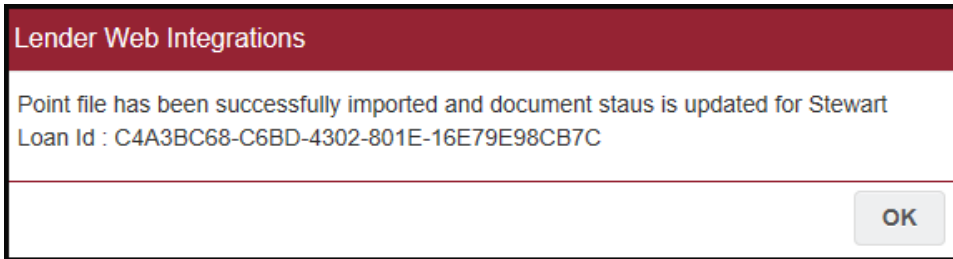2. From the **Communications** tab, click the **Carrot symbol** ▼ to expand the screen.

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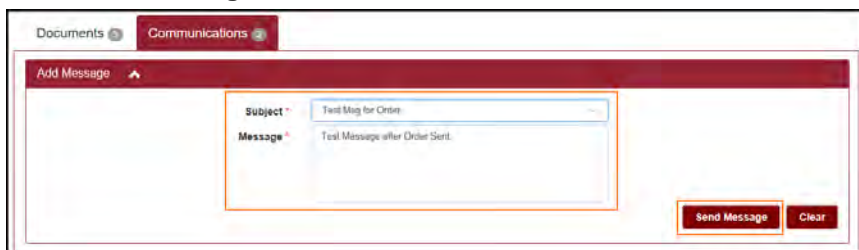
5. A pop-up window will appear stating **Message has been sent**. Click **OK**.

6. 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

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

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.