

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

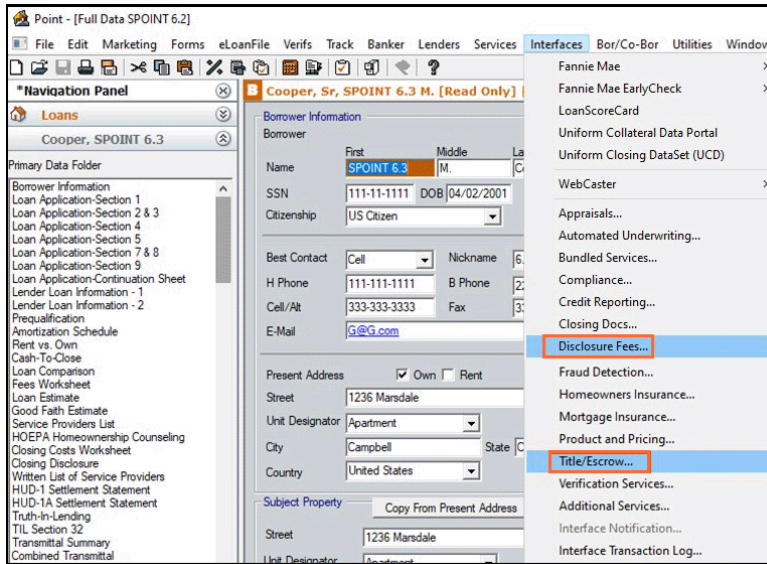
A *Desktop Email Client* application, such as **Microsoft Outlook** must be installed to use the [Request](#) links within the interface.

Launching the Interface

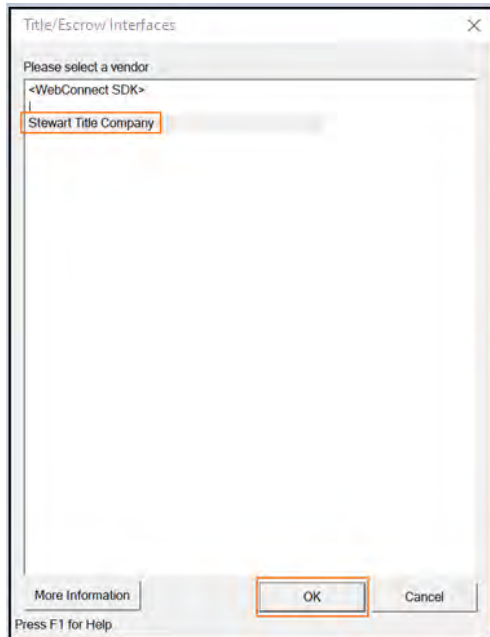
Once the integration is setup, you can import the fee data from **Stewart Rate Calculator** into **Calyx Point**.

Steps

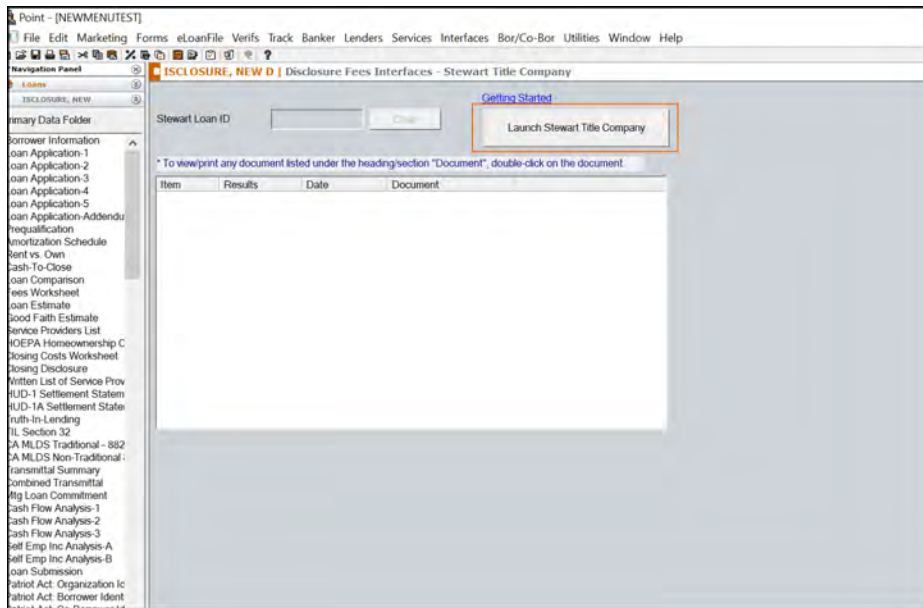
1. From the *Calyx Point* menu bar, click the **Interfaces** drop-down from the top menu.
2. Click **Title/Escrow** or **Disclosure Fees**.



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.



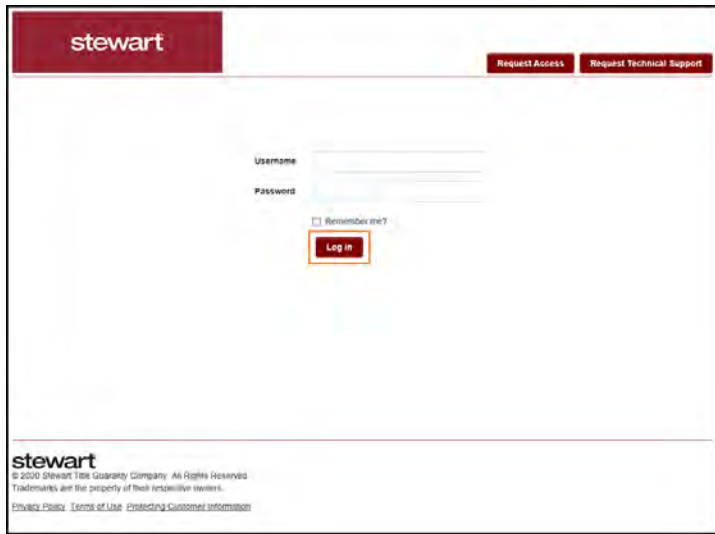
Using Calyx Point

Logging In

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

Steps

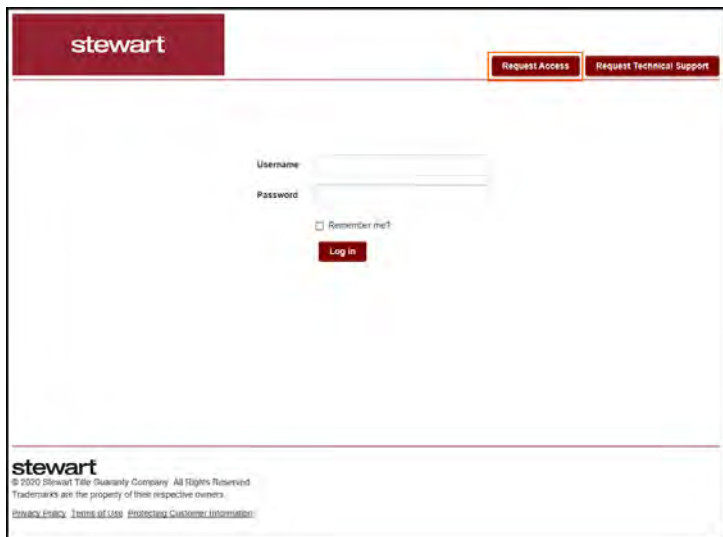
1. Enter your **Calyx Point** login credentials and then click **Login**.
2. (Optional) Select the *Remember Me?* checkbox to save the username for re-entry while your point session is active.




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**.

	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.

The screenshot shows the Stewart Title interface with the following details:

- Stewart Loan ID: 4ED7433B-88FA-430F-80D9-92762ADD8C06
- Welcome calyxuser01
- Request Technical Support | Log Out
- Place Order (selected) | Get Pricing Quote
- Messages: Please place order. Buttons: Get Pricing, Place Order, Cancel Order
- Office Information: Stewart Centralized Title Services, 500 North Broadway, Suite 900, St. Louis MO 63102, 844-573-5082
- Borrowers: Borrower: SPOINT 77 Cooper, CoBorrower: (empty)
- Property Information: Address: 213 Montgomery, Los Gatos CA, County: Santa Clara
- Loan Information: Loan Number: 6021476554, Loan Type: FHA, Loan Purpose: Refinance, Loan Amount: 85000, Purchase Price: (empty), Estimated Closing: 07/30/2021, Escrow File Number: (empty)
- Documents: Add Document dropdown, table with columns Name, Date, Status. Note: No documents are available. Buttons: View, Download, Report to Calyx Point
- Footer: © 2021 Stewart Title Guaranty Company. All Rights Reserved.

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**.

The screenshot shows the Stewart Title interface with an error message and updated loan details:

- Stewart Loan ID: 4ED7433B-88FA-430F-80D9-92762ADD8C06
- Welcome calyxuser01
- Request Technical Support | Log Out
- Place Order (selected) | Get Pricing Quote
- Error Message: All Borrowers must have First Name, Last Name, Email, Address, City, State and Zip.
- Messages: Please place order. Buttons: Place Order, Cancel Order, Get Pricing, User Guide
- Select Office: Stewart Centralized Title Services, 500 North Broadway, Suite 900, St. Louis MO 63102, 844-573-5082. Radio buttons for Centralized (selected) and Local Office.
- Borrowers: Borrower: Don R Cooper JR, CoBorrower: (empty)
- Property Information: Address: 346 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: (empty)
- Documents: Add Document dropdown, table with columns Name, Date, Status. Note: No documents are available.
- Footer: © 2021 Stewart. All right. | (800) STEWART | stewart.com | 7/21 | 9

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
844-573-5082

Borrowers
Borrower: SPDINT 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: 07/05/2021
Escrow File Number:

Documents Communications

Add Document

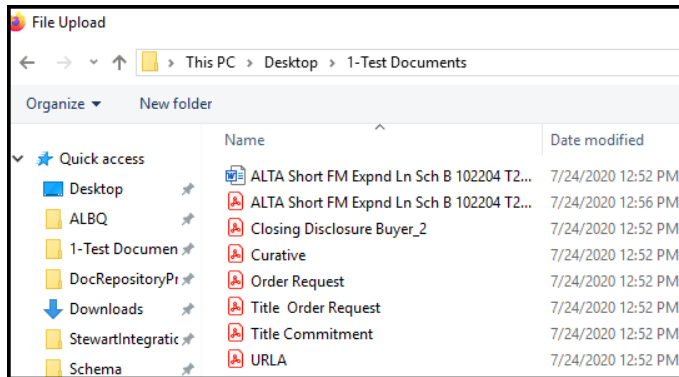
Select Document

Description

*Each document cannot exceed 20 MB

Name	Date	Status
No documents are available.		

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 0 Communications 0

Add Document ▲

Select Document *

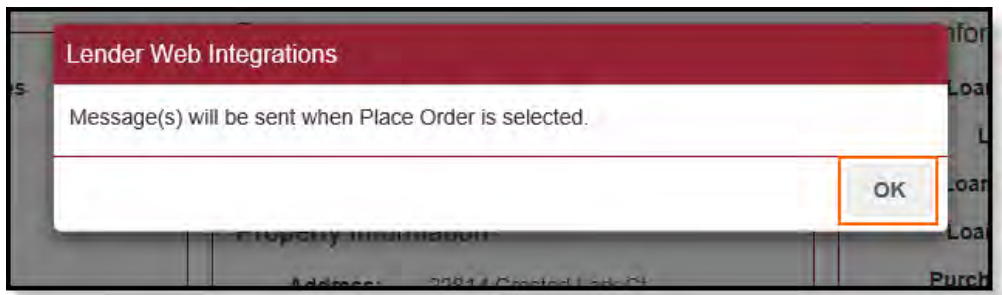
Description

*Each document cannot exceed 20 MB

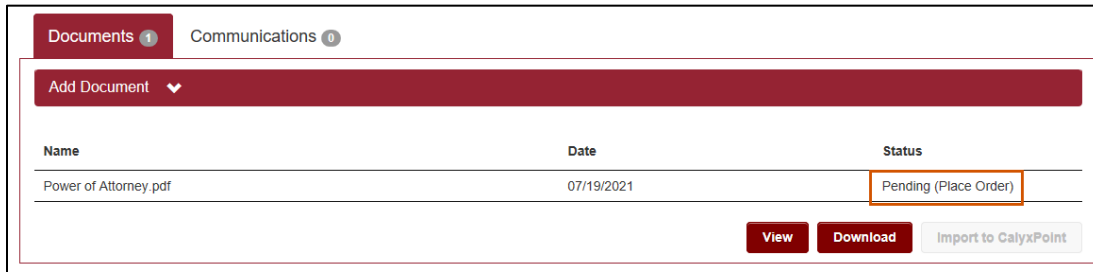
Name	Date	Status
No documents are available.		

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.

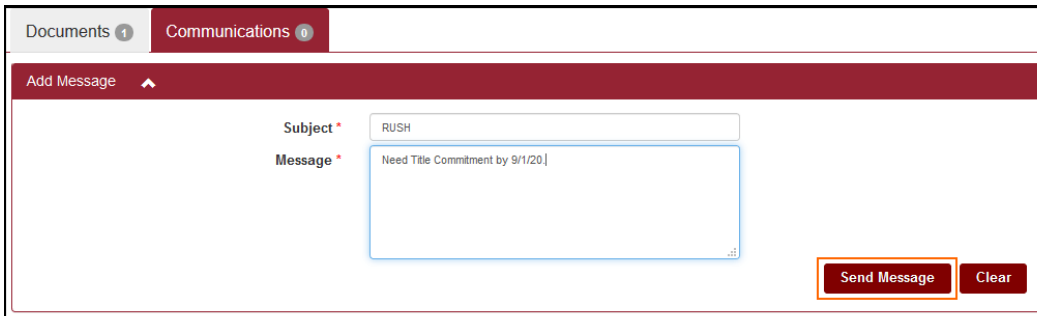


Send Messages with Place Order

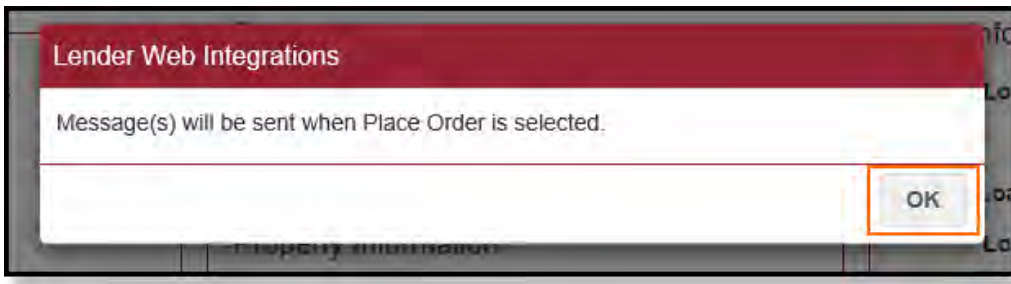
Use the steps below to send messages with **Place Order**.

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**.



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



- 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

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

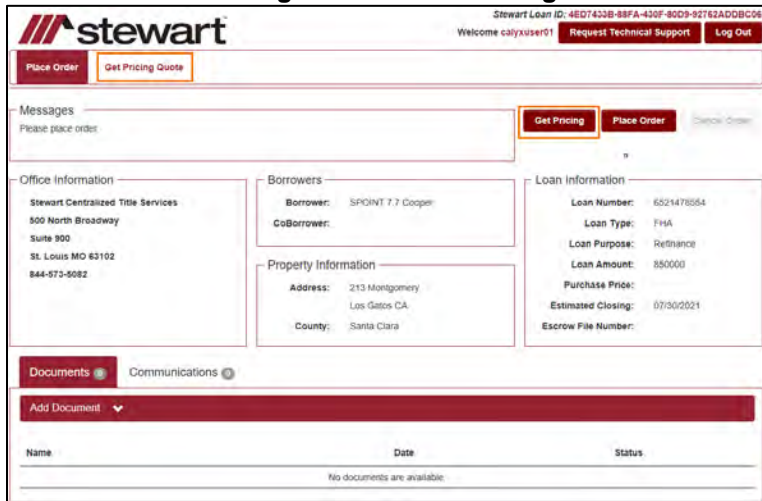
Calculating Fees

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**.

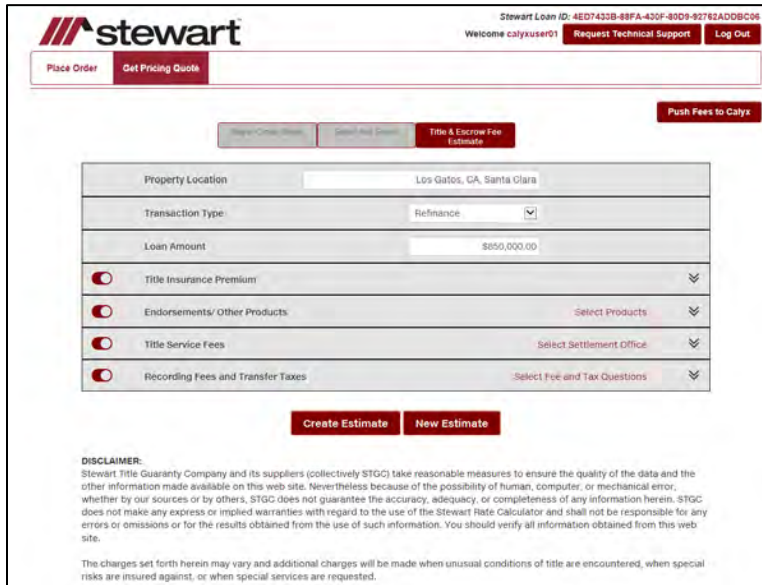
Steps

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



The screenshot shows the Stewart Rate Calculator interface. At the top, there is a header with the Stewart logo, a loan ID (4ED7433B-88FA-430F-80D9-92762ADD8C06), and a welcome message for user 'calyxuser01'. Below the header, there are two tabs: 'Place Order' and 'Get Pricing Quote'. The 'Get Pricing Quote' tab is selected. 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, 844-673-6882), 'Borrowers' (Borrower: SPOINT 7.7 Cooper, CoBorrower:), 'Property Information' (Address: 213 Montgomery, Los Gatos CA, County: Santa Clara), and 'Loan Information' (Loan Number: 6521478554, Loan Type: FHA, Loan Purpose: Refinance, Loan Amount: 850000, Purchase Price: , Estimated Closing: 07/30/2021, Escrow File Number:). Below these sections, there are tabs for 'Documents' and 'Communications'. The 'Documents' tab is selected, and there is a table with columns for 'Name', 'Date', and 'Status'. The table is currently empty, with a message '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 with a form for calculating fees. At the top, there is a header with the Stewart logo, a loan ID (4ED7433B-88FA-430F-80D9-92762ADD8C06), and a welcome message for user 'calyxuser01'. Below the header, there are two tabs: 'Place Order' and 'Get Pricing Quote'. The 'Get Pricing Quote' tab is selected. 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, 844-673-6882), 'Borrowers' (Borrower: SPOINT 7.7 Cooper, CoBorrower:), 'Property Information' (Address: 213 Montgomery, Los Gatos CA, County: Santa Clara), and 'Loan Information' (Loan Number: 6521478554, Loan Type: FHA, Loan Purpose: Refinance, Loan Amount: 850000, Purchase Price: , Estimated Closing: 07/30/2021, Escrow File Number:). Below these sections, there are tabs for 'Documents' and 'Communications'. The 'Documents' tab is selected, and there is a table with columns for 'Name', 'Date', and 'Status'. The table is currently empty, with a message 'No documents are available'. Below the table, there are two buttons: 'Create Estimate' and 'New Estimate'. Below the buttons, there is a disclaimer: 'DISCLAIMER: Stewart Title Guaranty Company and its suppliers (collectively STGC) take reasonable measures to ensure the quality of the data and the other information made available on this web site. Nevertheless because of the possibility of human, computer, or mechanical error, whether by our sources or by others, STGC does not guarantee the accuracy, adequacy, or completeness of any information herein. STGC does not make any express or implied warranties with regard to the use of the Stewart Rate Calculator and shall not be responsible for any errors or omissions or for the results obtained from the use of such information. You should verify all information obtained from this web site. The charges set forth herein may vary and additional charges will be made when unusual conditions of title are encountered, when special risks are insured against, or when special services are requested.'

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



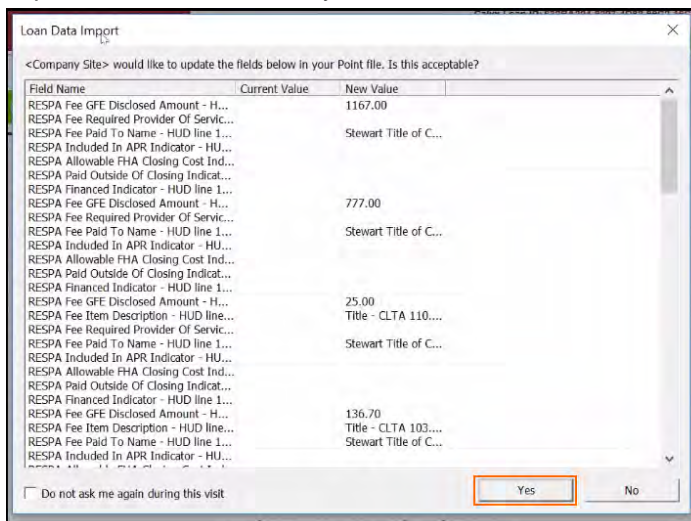
- From the *Stewart Rate Calculator* screen, click **Download**.



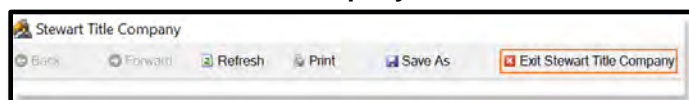
IMPORTANT

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.

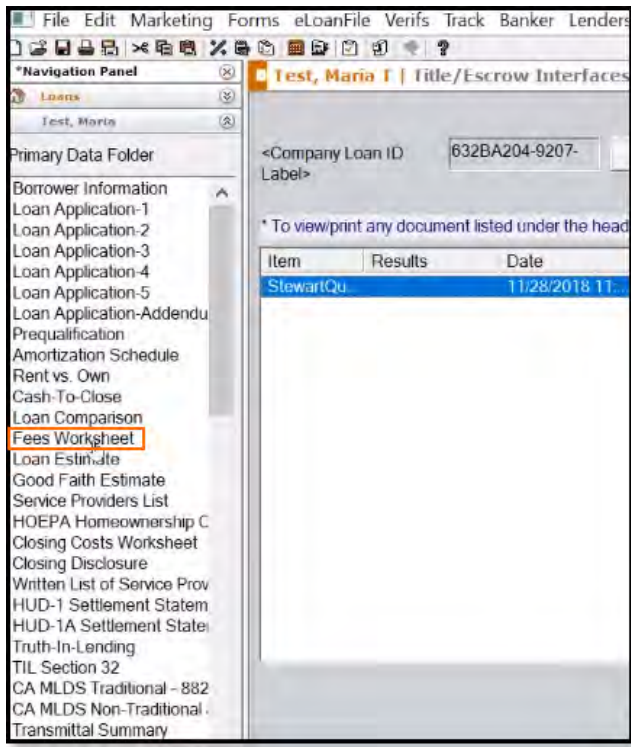
- To import the **TRID Premiums, Endorsement Amounts, Title Service Fees, and/or Recording Fees/Transfer Taxes**, click on **Push Fees to Calyx**. Use the **PDF** copy of the quotes for your reference (if needed).
- A pop-up will display the **Current Value** of the fees in your loan and the **New Value**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



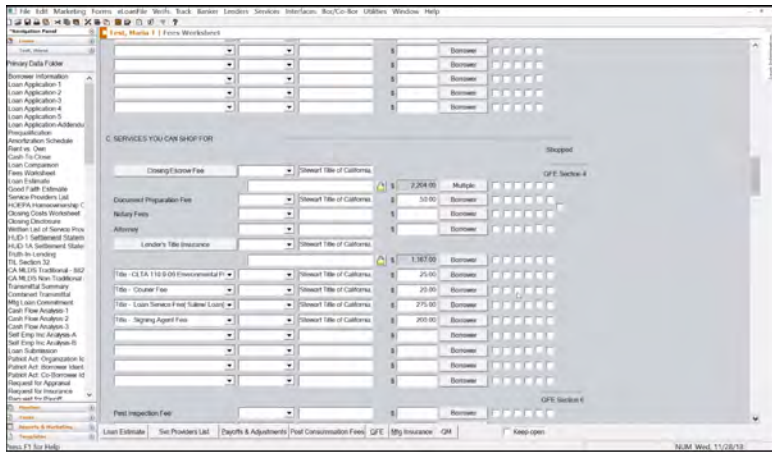
- Click **Exit Stewart Title Company** to exit the interface.



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**.

The screenshot shows the Stewart loan management interface. At the top, the Stewart logo is on the left, and the loan ID '4ED7433B-88FA-420F-80D9-82782AD0BC06' is on the right. Below the logo, there are tabs for 'Place Order' and 'Get Pricing Quote'. A message bar says 'Thank you for your order! Escrow File Number: NSWREF21323326'. The 'Messages' section contains 'Welcome Back! Thank you for your order.' and buttons for 'Get Pricing' and 'Cancel Order'. The 'Office Information' section lists 'Stewart Centralized Title Services' with address '500 North Broadway, Suite 900, St. Louis MO 63102, 844-573-5082'. The 'Borrowers' section lists 'Borrower: SPOINT 7.7 Cooper' and 'CoBorrower:'. The 'Property Information' section lists 'Address: 213 Montgomery, Los Gatos CA' and 'County: Santa Clara'. The 'Loan Information' section lists 'Loan Number: 6521478554', 'Loan Type: FHA', 'Loan Purpose: Refinance', 'Loan Amount: 850000', 'Purchase Price:', 'Estimated Closing: 07/30/2021', and 'Escrow File Number: NSWREF21323326'. At the bottom, there are sections for 'Documents' and 'Communications', with an 'Add Document' button and a table showing a document 'Power of Attorney.pdf' with date '07/07/2021 07:40:17 PM' and status 'Sent'.

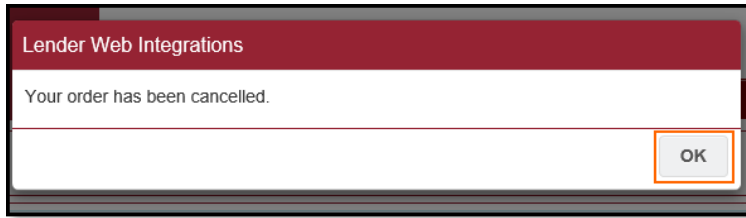
2. A pop-up message will appear which confirms if want to cancel the order. Click **OK**.

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

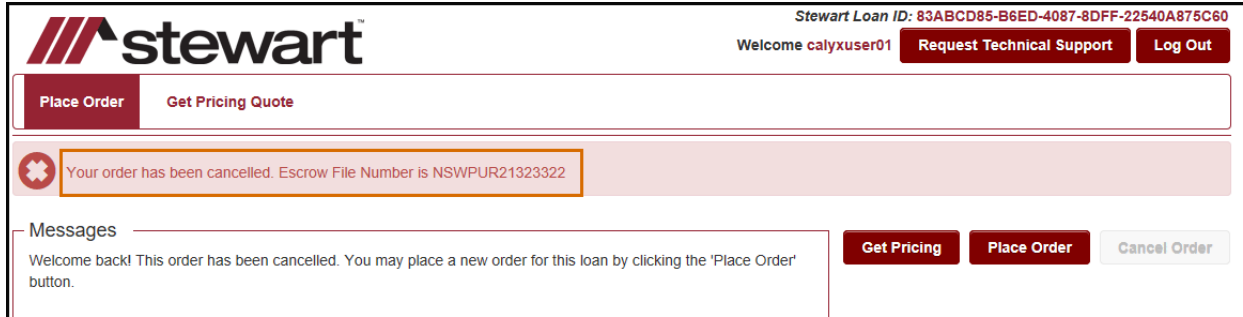
3. A **Cancel Order** window will appear. In the *Comments* field, enter your reason for cancellation. Click **Submit**.

The screenshot shows the 'Cancel Order' window. It displays the following information: 'Property Address: 22814 Crested Lark Ct, Katy TX 77450, County: HARRIS', 'Loan Number: 575144', 'Borrower: Carol Snapka', and 'CoBorrower:'. There is a 'Comments' field with the text 'Application Denied' entered. At the bottom of the window, there are two buttons: 'Submit' and 'Cancel'.

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.



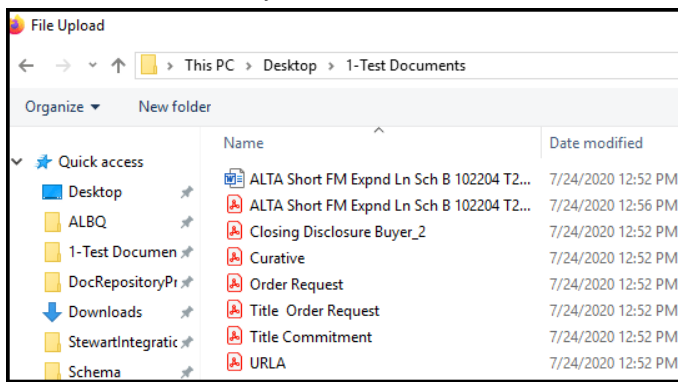
Note: Users may place an order again, if needed.

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:	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 4 Communications 0

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 0

Add Document ▲

Select Document *

Description

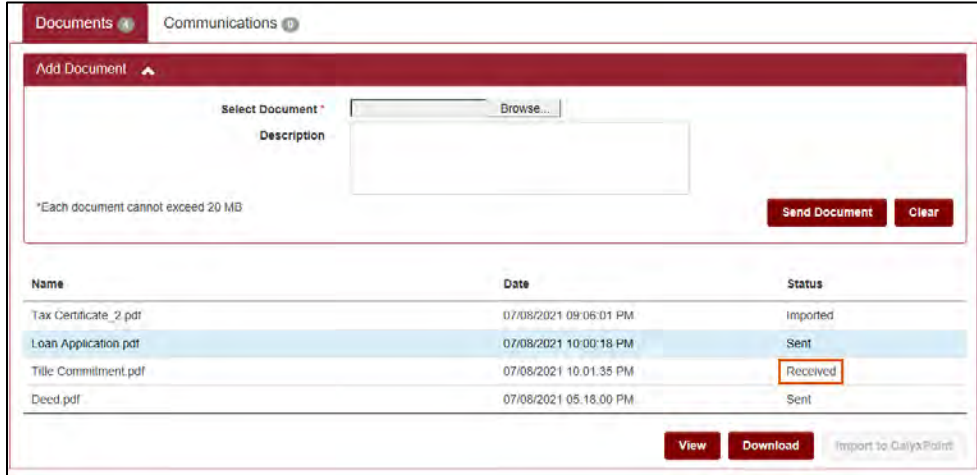
*Each document cannot exceed 20 MB

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	<input type="button" value="Sent"/>
Title Commitment.pdf	07/08/2021 10:01:35 PM	Received
Deed.pdf	07/08/2021 05:18:00 PM	<input type="button" value="Sent"/>

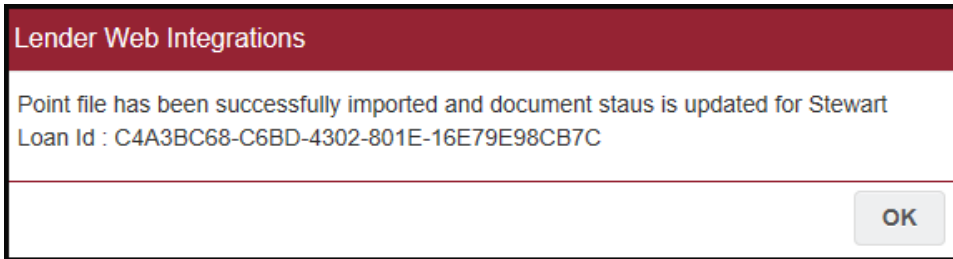
Receive/Import Documents

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

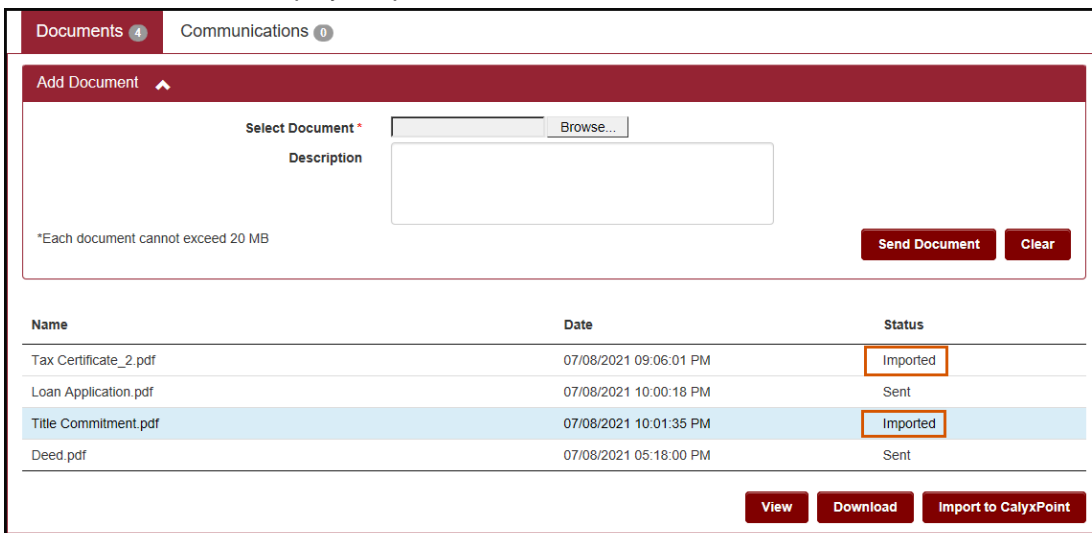
1. The document will appear in the **Documents** tab with a *Received* status.



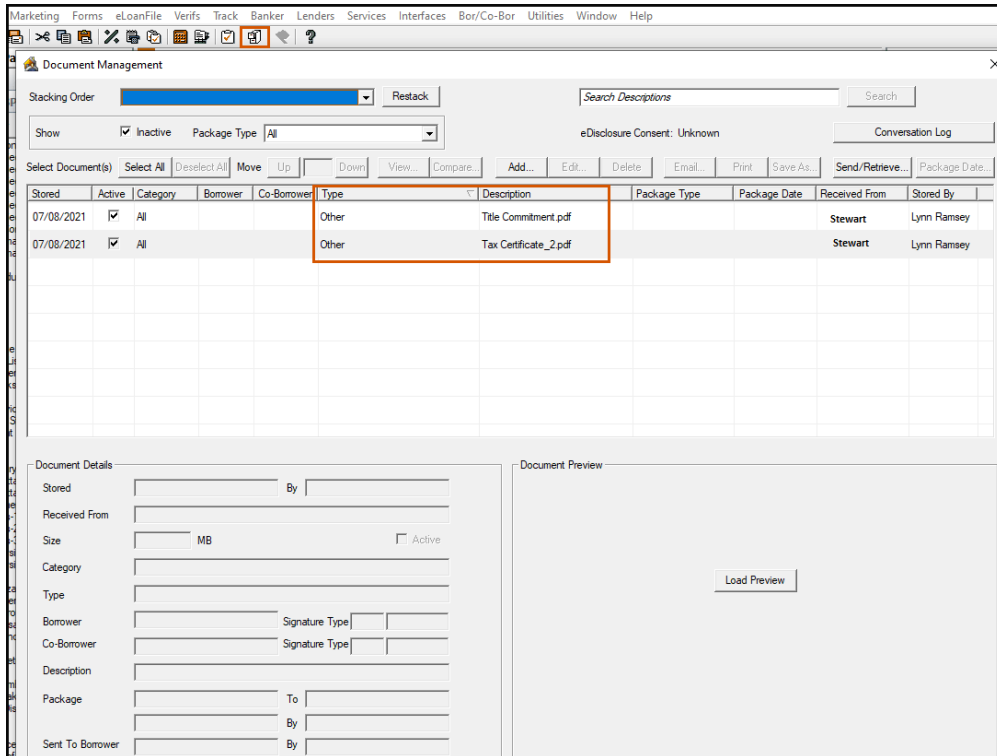
2. To import the *Received* document into **Calyx Point**, highlight the document you wish to import and click **Import to Calyx Point** button.
3. A pop-up appears. Click **OK**.



4. The document status displays *Imported*.



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



Send Messages

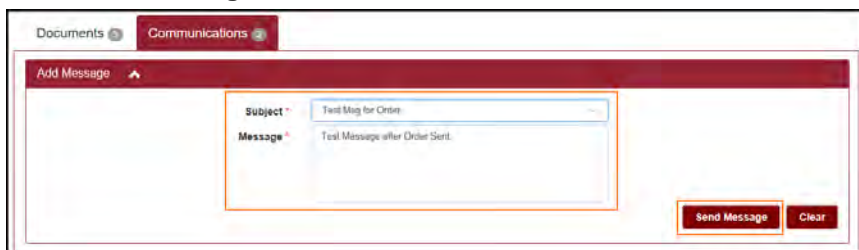
Use the steps below to Send Messages after an order has been placed in **Stewart Integration**.

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**.



- 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 1 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.

A screenshot of the Stewart Title Company login page. The page features a dark red header with the 'stewart' logo on the left. On the right side of the header, there are two buttons: 'Request Access' and 'Request Technical Support'. Below the header, the main content area contains a login form with fields for 'Username' and 'Password', a 'Remember me?' checkbox, and a 'Log in' button. At the bottom of the page, there is a footer with the 'stewart' logo, copyright information for 2020, and links for 'Privacy Policy', 'Terms of Use', and 'Protecting Customer 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.