

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 <u>Request links</u> 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.

Title/Escrow Interfaces	\times
Please select a vendor	
<webconnect sdk=""></webconnect>	
Stewart Title Company	
More Information OK Cancel	
Press F1 for Help	

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.

stewart			
		Request Access	Request Technical Support
Use	name		
Pas	word		
	Remember me?		
	Log in		
stewart			
Trademarks are the property of their respective owners.			
Privacy Policy, Terms of Use, Protecting Customer Information			

Requesting Access

Use the steps to request access to Calyx Point.

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

stewart				
			Request Access	Request Technical Support
Us Pa	sername assword	C Remember me?		
Stewart © 2020 Stewart Title Guaranty Company. All Rights Reserved. Trademarks are the property of their respective owners.				
Privacy Policy Terms of Use Protecting Customer Information				

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

\triangleright	То	Lenderregistration
Send	Cc	
	Subject	Request Access for Calyx Point to Stewart integration
Please comp	plete the follow	ing information to be setup as a Calyx Point to Stewart integration user.
Stewart Rej Stewart Rej	presentative Na presentative En	me: nail:
All below in	formation is re	quired:
ls your com Lender	pany setup in P Broker	oint as: Both
Company Ir Name: Address:	nformation:	
NMLS No. f	or COMPANY:	
Company C Contact Pho	ontact Name: one Number:	
Users: (Ple 1. 2. 3.	ease provide Fu	lName, UserName and Email of each user. Passwords will be sent to all new users.)

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.

Slewari	•	Request reclinica	Log
Place Order Get Pricing Quote			
Messages Please place order.		Get Pricing Place O	rder Cancel Or
Office Information	Borrowers	Loan Information	
Stewart Centralized Title Services 500 North Broadway Suite 900	Borrower: SPOINT 7.7 Cooper CoBorrower:	Loan Number: Loan Type: Loan Purpose;	6521478554 FHA Refinance
St. Louis MO 63102 844-573-5082	Property Information Address: 213 Montgomery	Loan Amount: Purchase Price:	850000
	Los Gatos CA County: Santa Clara	Estimated Closing: Escrow File Number:	07/30/2021
Documents Communications Add Document	0		
Name	Date	Status	
	No documents are available.		
		View Download	Import to CalyxPoi
✓stewart			

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.

Place Order Get Pricing Quote	Stewart Lo. Welcome calyxuser	an ID: 4ED7433B-88FA-430F-80D9-82762ADDBC06 701 Request Technical Support Log Out
All Borrowers must have First Name, Last Name Messages Please place order. Select Office Stewart Centralized Title Services 500 North Broadway Suite 900 St. Louis M0 63102 844-573-5082 @ Centralized Local Office Locate Office	e, Email, Address, City, State and Zrp Borrowers Borrower: Don R Cooper JR. CoBorrower: Property Information Address: 346 Bellaire Los Gatos CA 95030 County: Santa Clara	Place Order Cancel Order Get Pricing User Guide Loan Number: 2020080027 Loan Type: Conventional Loan Amount: \$700,000.00 Purchase Price: \$800,000.00 Estimated Closing: 10/11/2020 Escrow File Number:
Documents () Communications () Add Document		
Name	Date No documents are available.	Status

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 V to expand the screen. Click **Browse**.

- Office Information	- Borrowers -		- Loan Information -	
Onice mornation	Donowers		Loan mornation	
Stewart Centralized Title Services	Borrower:	SPOINT 7.7 Cooper	Loan Number:	6521478554
500 North Broadway	CoBorrower:		Loan Type:	FHA
Suite 900			Loan Purpose:	Refinance
St. Louis MO 63102	Property Info	mation —	Loan Amount:	850000
844-573-5082	Addross	212 Montromen	Purchase Price:	
	Address.		Estimated Closing	07/30/2021
		LUS GAIOS CA	Estimated closing.	01/30/2021
	County:	Santa Clara	Escrow File Number:	
Add Document Select Document Description	t* Don	Browse	Send D	ocument 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.

📦 File Upload		
\leftarrow \rightarrow \checkmark \uparrow \square \rightarrow Thi	s PC > Desktop > 1-Test Documents	
Organize 👻 New folde	r	
1.0.11	Name	Date modified
V P Quick access	🗐 ALTA Short FM Expnd Ln Sch B 102204 T2	7/24/2020 12:52 PM
	👃 ALTA Short FM Expnd Ln Sch B 102204 T2	7/24/2020 12:56 PM
ALBQ 🛪	Closing Disclosure Buyer_2	7/24/2020 12:52 PM
1-Test Documen 🖈	👃 Curative	7/24/2020 12:52 PM
🚽 DocRepositoryPr 🖈	🔒 Order Request	7/24/2020 12:52 PM
👆 Downloads 🛛 🖈	👃 Title Order Request	7/24/2020 12:52 PM
StewartIntegratic 🖈	🔒 Title Commitment	7/24/2020 12:52 PM
Schema 🖈	🕭 URLA	7/24/2020 12:52 PM

4. Click Send Document.

- Office Information	- Borrowers -		 - Loan Information	
	Donowers		Loan mormation	
Stewart Centralized Title Services	Borrower:	SPOINT 7.7 Cooper	Loan Number:	6521478554
500 North Broadway	CoBorrower:		Loan Type:	FHA
Suite 900			Loan Purpose:	Refinance
St. Louis MO 63102	- Property Infor	mation	Loan Amount:	850000
844-573-5082	r topolity into		Burchase Bries	
	Address:	213 Montgomery	Purchase Price:	
		Los Gatos CA	Estimated Closing:	07/30/2021
	County:	Santa Clara	Escrow File Number:	
Add Document Select Documen Descripti *Each document cannot exceed 20 MB	nt *	Browse	Send D	locument
Name	No	Date	 Status	\$
			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**.

1	Lender Web Integrations	h	for
5	Message(s) will be sent when Place Order is selected.	L	.oai L
		ок -	oar
	Address: 22814 Crosted Lark Ct	Pur	.oai rch

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.

Documents 1 Communications 0		
Add Document 🗸		
Name	Date	Status
Power of Attorney.pdf	07/19/2021	Pending (Place Order)
		View Download Import to CalyxPoint

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.

Documents Communications		
Add Message 🔺		
Subject * Message *	RUSH Need Title Commitment by 9/1/20.	Send Message Clear

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

1	Lender Web Integrations			nfo
ľ	Message(s) will be sent when Place Order is selected.			Loa
I		0	к	.oa
				Loa

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.

Documents 1	Communications			
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)
Lynn	RUSH	Need hat communeit by <i>a lize</i> .	00/21/2020 03:03:55 FW	View Messa

- 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.

slewart		Welcome calyxuse	r01 Request Technical	Support Log Out
Place Order Get Pricing Quote				
- Messages		G	et Pricing Place Ord	er Cancel Order
- Office Information Stewart Centralized Title Services 500 North Broadway Suite 900 St. Louis MO 63102 844-573-5082	Borrowers Borrower: SPOINT 7. CoBorrower: Property Information — Address: 213 Montg Los Gatos	7 Cooper	Coan Information Loan Number: (Loan Type: Loan Purpose: Loan Amount: Purchase Price: Estimated Closing: (521478554 FHA Refinance 550000 77/30/2021
Documents Communications	County: Santa Clar	2	Escrow File Number:	
Add Document 🗸		Date	Status	
	No documents a	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**.

	towart	Stewart Loan ID: 4ED7433B-88FA-430F-80D9-92				
5		welcome calyxusero1 Request recritical	support			
ace Order	Get Pricing Quote					
			Push F			
	Buyer Close Sheet Seller Net She	Title & Escrow Fee Estimate	- usin			
	Property Location	Los Gatos, CA. Santa Clara				
	Transaction Type	Refinance				
	Loan Amount	\$850,000.00				
	Title Insurance Premium		*			
	Endorsements/ Other Products	Select Products	*			
	Title Service Fees	Select Settlement Office	*			
	Recording Fees and Transfer Taxes	Select Fee and Tax Questions	*			
	Create Estimate	New Estimate				
	oreate Estimate	New Estimate				
DISCLAIN Stewart T other info	IER: itle Guaranty Company and its suppliers (collectively STGC) rmation made available on this web site. Nevertheless beca	take reasonable measures to ensure the quality of the data ause of the possibility of human, computer, or mechanical e	and the rror,			
whether t does not errors or site.	yy our sources or by others, STGC does not guarantee the a make any express or implied warranties with regard to the omissions or for the results obtained from the use of such i	accuracy, adequacy, or completeness of any information he use of the Stewart Rate Calculator and shall not be respons information. You should verify all information obtained from	rein. STG0 ible for ar this web			
The charg risks are i	es set forth herein may vary and additional charges will be	made when unusual conditions of title are encountered, whether the second s	nen specia			

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

0	Title Service Fees	nine e natiogrand etterar 🕺
	Recording Fees and Transfer Taxes	Select Fee and Tax Questions
	Create Estimate	New Estimate

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

🧭 IMPORTANT

Name		
Company		
Email Address	someone@example.com	
Note	^	
	~	
Remember		
	Download Cancel	
<u></u>		

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.

G Back	Forward	Refresh	💩 Print	🛃 Save As	Exit Stewart Title Company
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8. From menu on the left, click Fees Worksheet.



The imported data will display.

land (2)							
	E Test, Mana T Fees Worksheet						
10 (N)					Borrower	Incore	
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roloei	•	•	\$		Borrower		
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Estimate			🛄 🖇	2,204.00	Multiple		
iders List	Document Preparation Fee	 Stewart Title of Californi 	3, \$	50.00	Borrower		
s Worksheet	Notary Fees	•	\$		Borrower		
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of Service Prov	Anomey	•	8		Dorrower		
tiement State	Lender's Title Insurance	 Stewart Title of Californi 	a,				
ding			- AL 4	1 167 00	Borrower		
aditional - 882					-		
on-Traditional i	Title - CLTA 110.9-06 Environmental Pi	Shewart Title of Californi	s, s	25.00	Borrower		
Summary	Title - Courier Fee 💌	 Stewart Title of Californi 	5 \$	20.00	Borrower		
mnitment	Title - Loan Service Feet Salew(Loan) -	 Stewart Title of Californi 	. «Г	275.00	Borrower	leečeEe	
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nayse z naysis 3	Title - Signing Agent Fee	 Stewart Title of Californi 	9, S	200.00	Borrower		
Analysis-A	•	•	\$		Borrower		
: Analysis-B		-		_	Destaura	Incore for	
Soon Organization Ic			•		Duriowei		
Borrower Ident	•	•	s		Borrower		
Co-Borrower Id	•	•	s		Borrower	Incore	
Insurance							
Disarti						GFE Section 6	
8	Pest Inspection Fee	•	\$	_	Borrower	ICCCCCC	
8			-	_			
Harketing 🛞	Loan Estimate Sur Providers List Pountfe & Ar	isstments Post Consumption Fees	OFF MM	Insurance	OM	Keen open	

Cancel Orders

Use the steps below to cancel orders through Stewart:

Steps

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

/// stewart			Stewar Welcome calyx	t Loan ID: 4ED7433B-88FA- user01 Request Technic	430F-80D9-92762ADDBC al Support Log Out
Place Order Get Pricing Quote					
Thank you for your order. Escrow File Number	er is NSWREF21323328				
Messages Welcome Back! Thank you for your order.				Get Pricing Place 0	Order Cancel Order
Office Information	Borrowers			- Loan Information	
Stewart Centralized Title Services	Borrower:	SPOINT 7.7 Cooper		Loan Number:	6521478554
Suite 900	CoBorrower:			Loan Type:	FHA
St. Louis MO 63102 844-573-5082	- Property Infor	mation		Loan Amount:	850000
	Address:	213 Montgomery		Purchase Price:	
	County:	Los Gatos CA Santa Clara		Estimated Closing: Escrow File Number:	07/30/2021 NSWREF21323328
Documents Communications Add Document)				
Name		Date		Status	
Power of Attorney.pdf		07/07/2021	07:40:17 PM	Sent	

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

Lender Web Integrations	
Are you sure you want to cancel order? All existing document(s) and message(s) will be removed.	:
Cancel	

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

Cancel O	order			
Pro	perty Address	22814 Crested Lark Ct Katy TX 77450	Loan Number Borrower	575144 Carol Snapka
	County	HARRIS	CoBorrower	
	Comments *	Application Denied		
				Submit 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.

///stewart	Stewart Loan ID: 83ABCD85-B6ED-4087-8DFF-22540A875C60 Welcome calyxuser01 Request Technical Support Log Out
Place Order Get Pricing Quote	
Your order has been cancelled. Escrow File Number is NSWPUR21323322	
Messages Welcome back! This order has been cancelled. You may place a new order for this los button.	an by clicking the 'Place Order' Get Pricing Place Order Cancel Order

```
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.

C Office Information	- Borrowers -		- Loan Information -				
Stewart Centralized Title Services 500 North Broadway	Borrower: CoBorrower:	SPOINT 7.7 Cooper	Loan Number: Loan Type:	6521478554 FHA			
suite 900 St. Louis MO 63102 844-573-5082	 Property Infor Address: County: 	mation 213 Montgomery Los Gatos CA Santa Clara	Loan Purpose: Loan Amount: Purchase Price: Estimated Closing: Escrow File Number:	Refinance 850000 07/30/2021			
Documents Communications Add Document	Documents Communications Add Document						
Select Document Descriptio	Select Document * Browse Description						
"Each document cannot exceed 20 MB Clear							
Name 	No	Date	Status				
	NO	uocuments are available.	View Download	Import to CalyxPoint			

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

Lender Web Integrations	
Document has been sent.	
	ок

5. The document status will be sent.

Documents ④ Communications ①		
Add Document		
Select Document * Description	Browse	
*Each document cannot exceed 20 MB		Send Document Clear
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
		View Download Import to CalyxPoint

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.

Documents Communications		
Add Document		
Select Document * Description	Browse	
*Each document cannot exceed 20 MB		Send Document Clear
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
		/iew Download Import to CalyxPoint

- 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**.

Lender Web Integrations	
Point file has been successfully imported and document staus is updated for Stew Loan Id : C4A3BC68-C6BD-4302-801E-16E79E98CB7C	/art
	ок

4. The document status displays Imported.

Documents ④ Communicati	ions 💿		
Add Document			
Selec	t Document *	Browse	
*Each document cannot exceed 20 MB			Send Document Clear
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
			View Download Import to CalyxPoint

Stacking Order Image: Stacking Order Search Descriptions Search Descriptions Search Descriptions Search Descriptions Show Image: Norward Descriptions Image: Norward Descriptions Conventation Log Select Descriptions Select All Desclect All More Up Down View. Compare: Add. Edd: Delete Email Print Save A.S. Send/Retrieve. Package Stored Category Bornower Convention Description Package Type Package Type Package Date Received From Stored Dy 07/08/2021 IV All Other Tax Centricate_2pdf Stewart Lynn Rame 07/08/2021 IV All Other Tax Centricate_2pdf Stewart Lynn Rame 07/08/2021 IV All Image: Stewart Other Tax Centricate_2pdf Image: Stewart Lynn Rame 07/08/2021 IV All Image: Stewart Lynn Rame Image: Stewart Lynn Rame 0 Image: Stewart Image: Stewart Image: Stewart Image: Stewart Lynn Rame 0 Image: Stewart Imag	Stacking Order Search Decorptons Search Show IP hactive Package Type All eDiadosure Consent: Unknown Conventation Log Stack Altive Category Benower Conventation Door View Conventation Door Stack Active Category Benower Conventation Door View Convent Door View Conventation Door View Convent Conventation Door View Conventation Door View Log Package Type Door Door Door View Log Package Type Door Door Door Door Door <td< th=""><th>S Document</th><th>t Manag</th><th>gement</th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th><th></th></td<>	S Document	t Manag	gement									
Show I Package Type I Convention Log Bided Document(s) Select All Decelect All Move Up Down View Compare Adda. Edd Delete Email Print Save A.S. Send/Retrieve Package Saved Active Category Borrower Coloremet Type Package Type<	Show I headtwe Package Type A Conversation Log Select All Despect All Despect All Move Up Down View Compares Add. Edd. Detect Email Pirk Save As Send/Retreve Package Stored Adtive Category Borower Constraint pr Tax Certificate_2.pdf Frackage Type Package Typ	Stacking Order					-	Restack	Search	h Descriptions		Search	
Belet All Destect All More Up Down View. Congare Add Edc Delete Email. Pint Save As. Send/Retreve Package Stored Active Category Borower Congare Add Edc Delete Email. Pint Save As. Send/Retreve Package 07/08/2021 IP All Other Tak Centificate 2.pdf Package Type Package Date Reserved From Save As. Send/Retreve Package 07/08/2021 IP All Other Tax Centificate 2.pdf Save As.	Belet All Destect All More Up Down View. Compare. Add. Edk. Detele Email. Print. Save As. Send Retrieve Package Date Received From Stored E Stored Active Category Borrower Compare Add. Edk. Detele Email. Print. Save As. Send Retrieve Package Date Received From Stored E 07/08/2021 IP All Other Take Commitment.pdf Image: Stored E Store E	Show		Inactive	Package Typ	>e All		•	eDisc	osure Consent: Unknown		Conve	ersation Log
Stored Active Category Borower Co-Borower Type Description Package Type Package Date Received From Stored by 07/08/2021 IF All Other Title Commitment pdf Stored Storeart Lynn Rama 07/08/2021 IF All Other Tas Cetficate_2pdf Stewart Lynn Rama 07/08/2021 IF All Other Tas Cetficate_2pdf Stewart Lynn Rama 07/08/2021 IF All Other Tas Cetficate_2pdf Stewart Lynn Rama 07/08/2021 IF All Other Tas Cetficate_2pdf Inclusion I	Stored Active Category Bernover Co-Benover Type Description Package Type Pa	elect Docume	nt(s)	elect All De	eselect All Mo	ve Up	Down	View Compare	Add Edit	Delete Email	Print Save As	Send/Retrieve	Package
07/09/2021 Image: stream of the commune t, pdf St	07/08/2021 V Al Other Tate Commitment pd stewart Lynn Ra 07/08/2021 V Al Other Tax Certificate_2.pdf Stewart Lynn Ra 07/08/2021 V Al Other Tax Certificate_2.pdf Stewart Lynn Ra 07/08/2021 V Al Other Tax Certificate_2.pdf Stewart Lynn Ra 0 Internet Stewart Internet Stewart Internet Stewart Internet Stewart Lynn Ra 0 Internet Stewart Internet Stewart Internet Stewart Internet Stewart Lynn Ra Stored Internet Stewart	Stored	Active	Category	Borrower	Co-Borrower	Туре	1	Description	Package Type	Package Date	Received From	Stored By
07/08/2021 Image: All control to the control to th	07/08/2021 Al Other Tax Certificate_2.pdf Stewart Lynn Ra Document Detais By Image: Stewart Lynn Ra Scred By Image: Stewart Lynn Ra Scred By Image: Stewart Lynn Ra Scred Stewart Lynn Ra Scred By Image: Stewart Lynn Ra Scred Stewart Lynn Ra Document Detais Image: Stewart Lynn Ra Document Detais Image: Stewart Lynn Ra Document Detais Image: Stewart Image: Stewart Scred By Image: Stewart Image: Stewart Document Detais Image: Stewart Image: Stewart Image: Stewart Scred MB Image: Stewart Image: Stewart Scred Signature Type Image: Stewart Image: Stewart Description Image: Stewart Image: Stewart Image: Stewart	07/08/2021	~	All			Other		Title Commitment.pdf			Stewart	Lynn Ramse
Document Details Stored By Received From Size MB Category Type Borower Signature Type Description	Document Detais	07/08/2021	~	All			Other		Tax Certificate 2.pdf			Stewart	Lynn Ramse
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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.

Documents 3 Communications 2		
Subje	e* Test Mag for Order × Test Message after Order Sent	Send Message Clear

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.

Documents (6 Communications (3		
Add Message	•			
Sender	Subject	Message	Date	Status
User	Test Msg 2	Sent with Place Order	AM	Sent
alyx 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	e 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
		6		View Messa

Technical or Transactional Support

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



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 <u>CustomerCare@stewart.com</u>.

Request Technical Support

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

stewart			
		Request Access	Request Technical Support
Usernam	•		
Passwor			
	Remember me?		
	Log in		
stewart			
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Privacy Policy Terms of Use 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 <u>CustomerCare@stewart.com</u>.