

LendingQB Integration with Stewart

User Guide

July 12, 2022



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Introduction

This document walks you through how to setup and use **LendingQB** to import **Fee Quotes** from **Stewart Rate Calculator** and to obtain **Title Fees Quotes**.

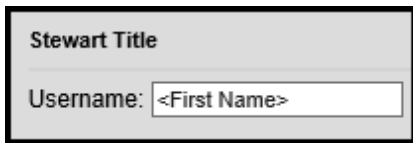
Prerequisites

Stewart Unique ID and Stewart Title Integration Access Setup

Follow these simple steps to acquire a **Stewart Unique ID**:

Steps


1. Download and complete the **LendingQB User Setup Form for Lenders** located [here](#).
2. Once you have completed the form, **save** your changes on the PDF and email it to lenderregistration@stewart.com.
3. Stewart Title will send you the **Stewart Unique ID**.
4. Once you have received your **Stewart Unique ID**, send an email request to integrations@lendingqb.com. Request access to the Stewart Title integration and include your **Stewart Unique ID** with your request.
5. **LendingQB** will add the **Stewart Title** integration option to your LendingQB account.
6. Once the **Stewart Title** integration option is available for your company, a **Corporate Admin** should add the **First Name** of each user so they can access the **Stewart Title** integration.
7. To add First Name for each user, follow these steps:
 - Go to *Corporate Admin*
 - Then *Employees*
 - Select a **User** and press **Edit**
 - Go to the *Credentials Tab*
 - Select **Stewart Title**
 - In the *Username* field, enter the **First Name** of the user



The screenshot shows a form titled "Stewart Title". Below the title, there is a label "Username:" followed by a text input field. Inside the input field, the text "<First Name>" is displayed as a placeholder.

Username and Password Setup

An on-boarding process is required for lenders to be set up to use the *Stewart Title Company* interface in *LendingQB*. Before this integration can be used, an account with Stewart must be created with the names of users who will submit fee quotes. Your Stewart Representative will provide you with the necessary form, as shown below to request access to this interface.

LendingQB User Setup Form for Lenders

Complete this form to add a Lender Organization and Points of Contact who require access to the *LendingQB* interface. See Section 4 to add Points of Contact.

Select the checkbox to indicate whether you are using this form to add or delete Lender users. If you are both adding and removing users, please select both checkboxes:

Section 1: Adding a New Lender/Bank
In the table below, enter the **Lender Name** and **NMLS ID** from *LendingQB*.

Lender Name/Organization Name	
NMLS ID	

Section 2: Obtain Stewart Unique ID for Access
To acquire your **Stewart Unique ID** and **Stewart Title** integration access, please follow these steps:

1. Complete this PDF form, **save** your changes on the PDF and email it to lenderregistration@stewart.com.
2. Stewart Title will send you the **Stewart Unique ID**.
3. Once you have received your **Stewart Unique ID**, send an email request to integrations@lendingqb.com. Request access to the Stewart Title integration and include your **Stewart Unique ID** with your request.
4. **LendingQB** will add the **Stewart Title** integration option to your *LendingQB* account.
5. Once the **Stewart Title** integration option is available for your company, a **Corporate Admin** should add the **First Name** of each user so they can access the **Stewart Title** integration.
6. To add the First Name for each user, follow these steps:
 1. Go to *Corporate Admin*.
 2. Then *Employees*.
 3. Select a **User** and press **Edit**.
 4. Go to the *Credentials Tab*.
 5. Select **Stewart Title**.
 6. In the *Username* field, enter the **First Name** of the user.

Stewart Title

Username: <First Name>

Access to Email

A *Desktop Email Client* application, such as Microsoft Outlook must be installed to use the request links within the interface.

Browser Compatibility

LendingQB can be used with **Microsoft Internet Explorer 11** or above, **Google Chrome**, and **Mozilla Firefox**.

Quotes for Title Fees – Closing Cost Fee Setup

Complete the following steps to properly setup **Closing Cost Fee** in **LendingQB**:

Steps

- Go to **Loan Programs/New Fee Type Setup** page.
- Scroll down to **Section C – Services You Can Shop For** and make the following changes:
 - For **Title Fees**:
 - Create entries for **Import-TF-1** through **Import-TF-8** in the **Description/Memo** field.
 - Please **uncheck Title checkboxes** for all eight entries since they will be automatically imported with **Title-** with the description.
 - For **Lender Endorsement**:
 - Create entries for **Import-LE-1** through **Import-LE-5** in the **Description/Memo** field.
 - Please **check Title checkboxes** for all five entries since **Title-** will not be imported with the description.

HUD Line	Title	Optional?	Description/Memo	GFE Box	Loan Est Sec	APR	FHA	Paid to	DFLP	TP	AFF	Can Shop	Mismo Type
1119	<input type="checkbox"/>	<input type="checkbox"/>	Import-TF-1	B6	C			Title				<input checked="" type="checkbox"/>	Blank
1120	<input type="checkbox"/>	<input type="checkbox"/>	Import-TF-2	B6	C			Title				<input checked="" type="checkbox"/>	Blank
1121	<input type="checkbox"/>	<input type="checkbox"/>	Import-TF-3	B6	C			Title				<input checked="" type="checkbox"/>	Blank
1122	<input type="checkbox"/>	<input type="checkbox"/>	Import-TF-4	B6	C			Title				<input checked="" type="checkbox"/>	Blank
1123	<input type="checkbox"/>	<input type="checkbox"/>	Import-TF-5	B6	C			Title				<input checked="" type="checkbox"/>	Blank
1124	<input type="checkbox"/>	<input type="checkbox"/>	Import-TF-6	B6	C			Title				<input checked="" type="checkbox"/>	Blank
1125	<input type="checkbox"/>	<input type="checkbox"/>	Import-TF-7	B6	C			Title				<input checked="" type="checkbox"/>	Blank
1129	<input type="checkbox"/>	<input type="checkbox"/>	Import-TF-8	B6	C			Title				<input checked="" type="checkbox"/>	Blank
1302	<input type="checkbox"/>	<input type="checkbox"/>	Pest inspection	B6	C			Pest Inspection				<input checked="" type="checkbox"/>	Pest Inspection Fee
1111	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Attorney fees	B4	C			Title				<input checked="" type="checkbox"/>	Attorney Fee
1102	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Closing/Escrow fee	B4	C			Title				<input checked="" type="checkbox"/>	Escrow Service Fee
1109	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Document preparation fee	B4	C			Title				<input checked="" type="checkbox"/>	Document Preparation Fee
1114	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Import-LE-1	B6	C			Title				<input checked="" type="checkbox"/>	Other Fee
1115	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Import-LE-2	B6	C			Title				<input checked="" type="checkbox"/>	Other Fee
1116	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Import-LE-3	B6	C			Title				<input checked="" type="checkbox"/>	Other Fee
1117	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Import-LE-4	B6	C			Title				<input checked="" type="checkbox"/>	Other Fee
1118	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Import-LE-5	B6	C			Title				<input checked="" type="checkbox"/>	Other Fee
1104	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Lender's title insurance	B4	C			Title				<input checked="" type="checkbox"/>	Title Lenders Coverage Premium
1110	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Notary fees	B4	C			Title				<input checked="" type="checkbox"/>	Notary Fee
1112	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Other 1	B6	C			Title				<input checked="" type="checkbox"/>	Other Fee
1113	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Other 2	B6	C			Title				<input checked="" type="checkbox"/>	Other Fee

- Scroll down to **Section E – Taxes and Other Government Fees** and make the following changes:
 - Create entries for **Import-TS-1** and **Import-TS-2** in **Description/Memo** field.
 - Please **uncheck Title checkboxes** for both entries as they are not **Title** fees.

HUD Line	Title	Optional?	Description/Memo	GFE Box	Loan Est Sec	APR	FHA	Paid to	DFLP	TP	AFF	Can Shop	Mismo Type
1206	<input type="checkbox"/>	<input type="checkbox"/>	City tax stamps	B8	E			Other				<input type="checkbox"/>	Tax Stamp For City Mortgage
1204	<input type="checkbox"/>	<input type="checkbox"/>	County tax stamps	B8	E			Other				<input type="checkbox"/>	Tax Stamp For County Mortgage
1202	<input type="checkbox"/>	<input type="checkbox"/>	Deed recording fee	B7	E			Other				<input type="checkbox"/>	Recording Fee For Deed
1207	<input type="checkbox"/>	<input type="checkbox"/>	Import-TS-1	B8	E			Other				<input type="checkbox"/>	Blank
1208	<input type="checkbox"/>	<input type="checkbox"/>	Import-TS-2	B8	E			Other				<input type="checkbox"/>	Blank
1202	<input type="checkbox"/>	<input type="checkbox"/>	Mortgage recording fee	B7	E			Other				<input type="checkbox"/>	Recording Fee For Mortgage
1202	<input type="checkbox"/>	<input type="checkbox"/>	Release recording fee	B7	E			Other				<input type="checkbox"/>	Recording Fee For Release
1205	<input type="checkbox"/>	<input type="checkbox"/>	State tax stamps	B8	E			Other				<input type="checkbox"/>	Tax Stamp For State Mortgage

4. Scroll down to **Section H – Other** and make the following changes:

- For **Title Fees**:
 - i. Create entries for **Import-TF-10** through **Import-TF-16** in **Description/Memo** field.
 - ii. Please **uncheck Title checkboxes** for all six entries, they will be imported with **Title-**.
- For **Owner Endorsement**:
 - i. Create entries for **Import-OE-1** through **Import-OE-3** in the **Description/Memo** field.
 - ii. Please **check Title checkboxes** for **Import-OE-1, Import-OE-2** entries since **Title-** will not be imported in the description.

H - Other														
HUD Line	Title	Optional?	Description/Memo	GFE Box	Loan Est Sec	APR	FHA	Paid to	DFLP	TP	AFF	Can Shop	Mismo Type	
1309	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Import-OE-3	B6	H			Title				<input checked="" type="checkbox"/>	Blank	-
1311	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Import-TF-10	B6	H			Title				<input checked="" type="checkbox"/>	Blank	-
1312	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Import-TF-11	B6	H			Title				<input checked="" type="checkbox"/>	Blank	-
1313	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Import-TF-12	B6	H			Title				<input checked="" type="checkbox"/>	Blank	-
1314	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Import-TF-13	B6	H			Title				<input checked="" type="checkbox"/>	Blank	-
1315	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Import-TF-14	B6	H			Title				<input checked="" type="checkbox"/>	Blank	-
1316	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Import-TF-15	B6	H			Title				<input checked="" type="checkbox"/>	Blank	-
1317	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Import-TF-16	B6	H			Title				<input checked="" type="checkbox"/>	Blank	-
1307	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Import-OE-1	B6	H			Title				<input checked="" type="checkbox"/>	Other Fee	-
1308	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Import-OE-2	B6	H			Title				<input checked="" type="checkbox"/>	Other Fee	-
1310	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Import-TF-9	B6	H			Title				<input checked="" type="checkbox"/>	Other Fee	-
1304	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Other 3	B6	H			Surveyor				<input checked="" type="checkbox"/>	Other Fee	-
1305	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Other 4	B6	H			Title				<input checked="" type="checkbox"/>	Other Fee	-
1306	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Other 5	B6	H			Title				<input checked="" type="checkbox"/>	Other Fee	-
1103	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Owner's title insurance	B5	H			Title				<input type="checkbox"/>	Title Owners Coverage Premium	-



All information must be **correctly** entered in the *Description/Memo fields* or the integration will not work properly. **Predefined Title Fees** will map accordingly. If you check any checkboxes, they will not be overwritten.

Documents – Setup

Complete the following steps to properly setup a folder for all Stewart documents in **LendingQB**:

Steps

1. Go to **Configure EDoc Setup** under **Corporate Admin**.
2. Click **Add** and name the folder **STEWART TITLE DOCUMENTS**.

Configure EDoc System

Folders | Doc Types | Stack Order | Shipping Templates | Document AutoSave Options

Add

Folder	Roles w/ Access		
UNCLASSIFIED (default)	All Roles		
STEWART TITLE DOCUMENTS	Administrator	edit	delete

3. Select the *Doc Types* tab and click on **Add**.

Configure EDoc System

Folders | **Doc Types** | Stack Order | Shipping Templates | Document AutoSave Options

Add

Folder	Doc Type		
STEWART TITLE DOCUMENTS	STEWART TITLE RATE QUOTE	edit	delete
STEWART TITLE DOCUMENTS	TITLE DOCUMENTS	edit	delete
UNCLASSIFIED	UNCLASSIFIED	edit	delete

[Restore Deleted Doc Types](#)

Close

4. Select the Folder **STEWART TITLE DOCUMENTS**.
5. Name the Doc Type as **STEWART TITLE RATE QUOTE**.
6. Name the Doc Type as **TITLE DOCUMENTS**.
7. Select **Close**.

This will allow Lenders to setup the ability for Stewart documents to be imported directly into their **EDocs** section. Read this [QRC](#) for more details.

- ★ **EDocs**
 - Document List
 - Batch Editor
 - Document Requests
 - Upload Documents
 - Cover Sheets
 - Ship Documents

- Folder Name - STEWART TITLE DOCUMENTS
- Doc Type – TITLE DOCUMENTS
- Description – Name of document from Stewart

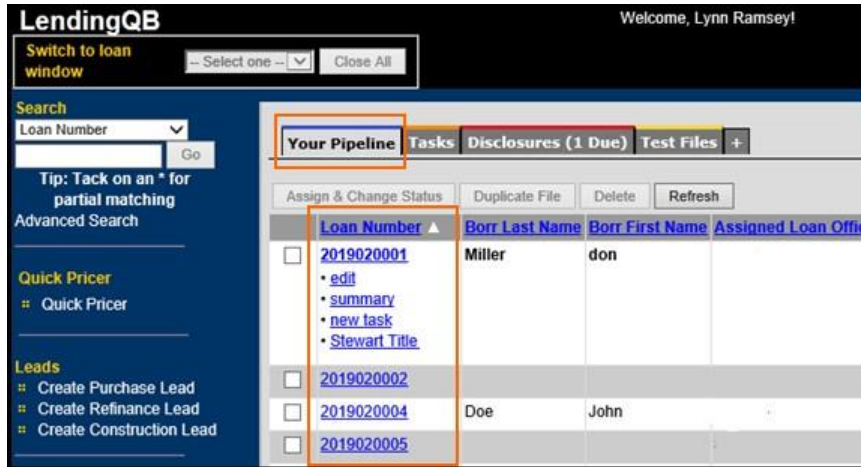
[illegible]

Launching the Interface

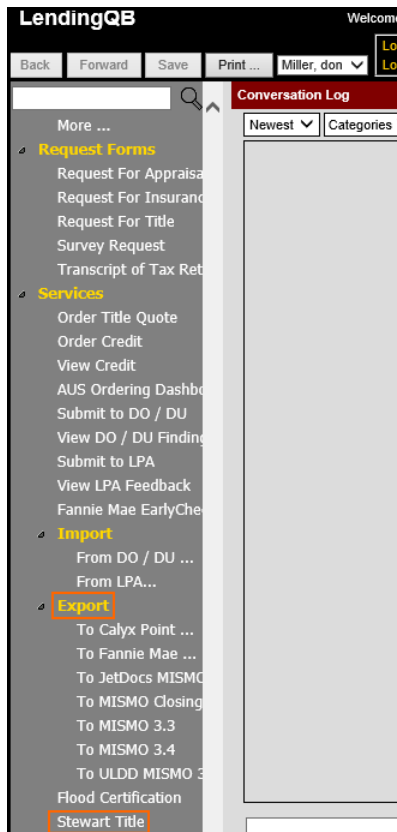
Once the integration is setup, you are ready to **Place Order** with Stewart Title or import **Fees** from **Stewart Rate Calculator** into **LendingQB**.

Steps

1. Log in to **LendingQB**.
2. Under the *Your Pipeline* tab, click on your Loan number and it expands.
3. Once you click on your Loan number, you can see the available options for that Loan.



4. Alternatively, you can go into your Loan and select **Stewart Title** under *Export* on the left navigation bar.



Placing an Order

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

Steps

1. Select **Stewart Title** in **LendingQB**.
2. The Stewart Title landing page have 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 Number: 2020080027 Welcome Lynn [Request Technical Support](#) [Close](#)

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

Messages
Please place order.

[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
☒ Centralized ☐ Local Office [Locate Office](#)

Borrowers
Borrower: Don R Cooper JR.
CoBorrower:

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:

Documents 0 Communications 0

Add Document ▼

Name	Date	Status
No documents are available.		

[View](#) [Download](#) [Import to LQB](#)

stewart
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Trademarks are the property of their respective owners.
[Privacy Policy](#) [Terms of Use](#) [Protecting Customer Information](#)



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

- 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 which will let you know what is missing. Close the Stewart Title page and go back to LendingQB to enter the missing information. Then re-launch the Stewart Title page again from LendingQB.

The screenshot shows the Stewart Title web application interface. At the top, the Stewart logo is on the left, and the loan number 2020080027 and user name Lynn are on the right. Below the header, there are buttons for 'Place Order' and 'Get Pricing Quote'. A red error message banner at the top states: 'All Borrowers must have First Name, Last Name, Email, Address, City, State and Zip'. The main form is divided into several sections: 'Messages' (with a 'Please place order.' message), 'Select Office' (showing 'Stewart Centralized Title Services' and a 'Locate Office' button), 'Borrowers' (with fields for 'Borrower' and 'CoBorrower'), 'Property Information' (with fields for 'Address' and 'County'), and 'Loan Information' (with fields for 'Loan Number', 'Loan Type', 'Loan Purpose', 'Loan Amount', 'Purchase Price', 'Estimated Closing', and 'Escrow File Number'). At the bottom, there are tabs for 'Documents' and 'Communications', and a table for 'Add Document' with columns for 'Name', 'Date', and 'Status'. The table currently shows 'No documents are available.' and has buttons for 'View', 'Download', and 'Import to LQB'.

- Depending on your access type, an office may be pre-selected. If not, you can use the **Locate Office** feature to select the office and place your **Title and Escrow** request.
- For **Home Equity** Loans, additional steps are required:

- When **Loan Purpose** in **LendingQB** shows *Home Equity*

The screenshot shows a portion of the LendingQB loan details form. The 'Loan Purpose' dropdown menu is highlighted with a red box and shows 'Home Equity' selected. Other fields visible include 'Lien Position' (1st Mortgage), 'Loan Type' (Conventional), 'Subj Prop Occ.' (Primary Residence), 'Amort. Type' (Fixed Rate), and 'ARM Description'.

- The Stewart Integration page shows **Home Equity** as the Loan Purpose.
- Two new required options will appear:

stewart Loan Number: 2019080004test-4P4X Welcome Mianna

[Request Technical Support](#) [Close](#)

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

Messages
Please place order.

[Place Order](#) [Cancel Order](#)
[Get Pricing](#) [User Guide](#) [What's New](#)

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: Betty Borrower
CoBorrower:

Property Information
Address: 1700 West 82nd Street, Suite 100
Minneapolis MN 55431
County: Hennepin

Loan Information
Loan Number: 2019080004test-4P4X
Loan Type: Conventional
Loan Purpose: Home Equity
☒ Insured ☐ Uninsured
Loan Amount: \$125,000.00
Purchase Price: \$0.00
Estimated Closing: 08/14/2022
Escrow File Number:

Documents **Communications**

[Add Document](#)

Name	Date	Status
No documents are available.		

[View](#) [Download](#) [Import to LQB](#)

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

6. For **Reverse Loans**, additional steps are required:

- When **Loan Type** in **LendingQB** is *Other*

Loan Purpose: Refinance Cashout Lien Position: 1st Mortgage **Loan Type: Other**

Refinance Program: LeaveBlank ☐ Lock

Is Being Refinanced by Same Lender: ☐ Student Loan Cashout?: ☐

Subj Prop Occ.: Primary Residence Amort. Type: Fixed Rate ARM Description:

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

The screenshot displays the Stewart Title user interface. At the top, the logo and navigation links are visible. The main content area is divided into several sections: Messages, Select Office, Borrowers, Property Information, and Loan Information. The 'Select Office' section includes a list of office locations and a 'Locate Office' button. The 'Borrowers' section shows the borrower's name. The 'Property Information' section displays the address and county. The 'Loan Information' section provides details about the loan, including the loan number, type, purpose, amount, and closing date. A red box highlights the 'Reverse' option under the 'Loan Type' section.

stewart

Loan Number: 2019080004test-4P4X
Welcome Mianna

[Request Technical Support](#) [Close](#)

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

Messages
Please place order.

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

[Get Pricing](#) [User Guide](#) [What's New](#)

Select Office

Stewart Centralized Title Services
Stewart Title Guaranty Company
500 North Broadway
Suite 900
St. Louis MO 63102
844-673-5082

☒ Centralized
☐ Local Office [Locate Office](#)

Borrowers

Borrower: Betty Borrower
CoBorrower:

Property Information

Address: 1700 West 82nd Street, Suite 100
Minneapolis MN 55431
County: Hennepin

Loan Information

Loan Number: 2019080004test-4P4X
Loan Type: [Other](#) [Reverse](#)
Loan Purpose: Refinance Cashout
Loan Amount: \$125,000.00
Purchase Price: \$0.00
Estimated Closing: 06/14/2022
Escrow File Number:

Documents [Communications](#)

[Add Document](#)

Name	Date	Status
No documents are available.		

[View](#) [Download](#) [Import to LQB](#)

Finding an Office

Complete the following steps to find an office:

Steps

1. Under *Locate Office*, click **Locate Office**.
2. Select from either **Property Address** to search for an office close to the property, or **Zip Code** to search for an office within a Zip code area.

3. Select the distance. **10 miles** is selected as the default, but you can change this in the **Distance (miles):** drop down. After selecting the distance, click on **Find Office(s)**.

The screenshot shows the Stewart Title website interface. At the top, the Stewart logo is on the left, and the loan number 2020080030 and user name Lynn are on the right. Below the header, there are buttons for 'Place Order' and 'Get Pricing Quote'. The main content area is divided into sections: 'Messages' (with a 'Please place order.' message), 'Select Office', and 'Documents' (with an 'Add Document' button). The 'Select Office' section has radio buttons for 'Centralized' and 'Local Office' (selected), and a 'Locate Office' button. A modal window titled 'Locate Office - Mozilla Firefox' is open, showing a search form. The search form has a 'Search By' section with 'Property Address' selected and 'Zip Code' set to 95030. Below this, the 'Distance (miles)' dropdown is set to 10. A 'Find Office(s)' button is next to the distance dropdown. The modal also displays a table of office locations:

Company	Address	City	State	Zip	Phone	Distance
Stewart Title of California, Inc.	750 University Ave	Los Gatos	CA	95032	408-354-6010	0.72
Stewart Title of California, Inc.	901 Campisi Way	Campbell	CA	95008	408-340-6700	4.85

At the bottom of the modal, there are 'Select Office' and 'Cancel' buttons. Below the modal, there are 'View', 'Download', and 'Import to LQB' buttons. The footer of the page includes the Stewart logo and copyright information: '© 2020 Stewart Title Guaranty Company. All Rights Reserved. Trademarks are the property of their respective owners.'



You can also manually enter a value in the **Distance (miles):** field.

4. In the results, select your desired office and click on **Select Office**.

Locate an Office

Search By

☐ Property Address ☒ Zip Code

555 TEST
Campbell CA 95008
County: Santa Clara

95008

Distance (miles): 10 **Find Office(s)**

Company	Address	City	State	Zip	Phone	Distance
Stewart Title of California, Inc.	901 Campisi Way	Campbell	CA	95008	4083406700	0.77
Stewart Title of California, Inc.	750 University Ave	Los Gatos	CA	95032	4083546010	3.69
Stewart Title of California, Inc.	2060 Aborn Rd	San Jose	CA	95121	6692754870	7.93

Select Office **Cancel**

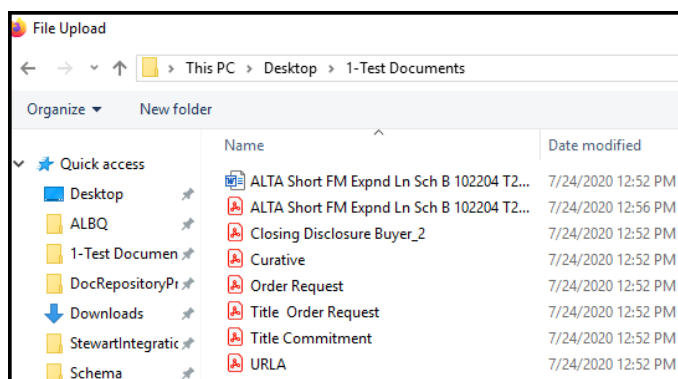
5. When an office is selected, its name and details will show up within the **Select Office** section. You may change this any time before placing the order.

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.
3. Select the **Document Type** and enter the **Description** (optional). You must add a document before the order is initiated, by click on **Browse**.



4. Click **Send Document**.

Documents Communications

Add Document

Select Document *

☒ from File System ☐ from LendingQB

Browse... No file selected.

Description

*Each document cannot exceed 20 MB

Send Document Clear

Name	Date	Status
No documents are available.		

View Download Import to LQB

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

Lender Web Integrations

Message(s) will be sent when Place Order is selected.

OK

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

Name	Date	Status
Title Order Request.pdf	08/27/2020 02:58:58 PM	Pending (Place Order)

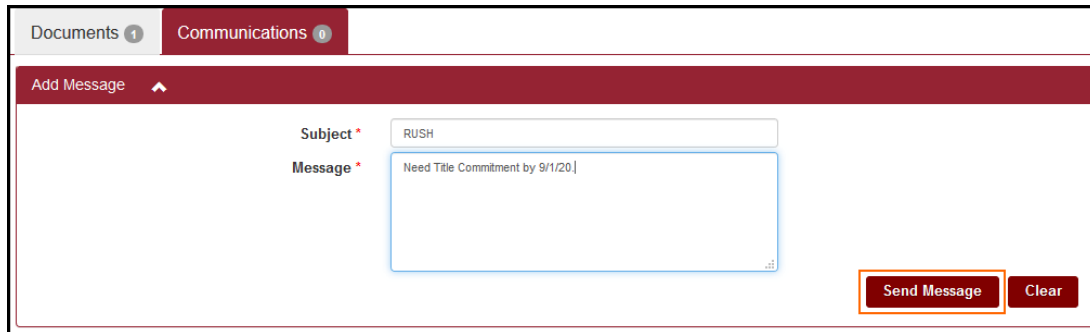
View Download Import to LQB

Send Messages with Place Order

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

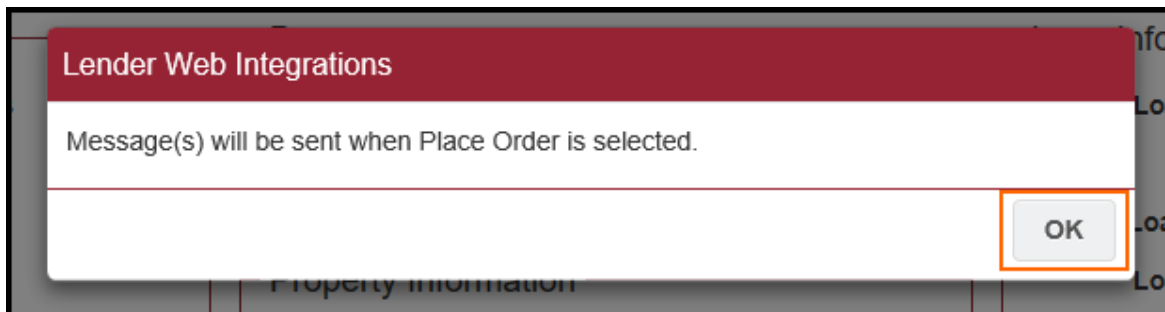
Steps

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**.



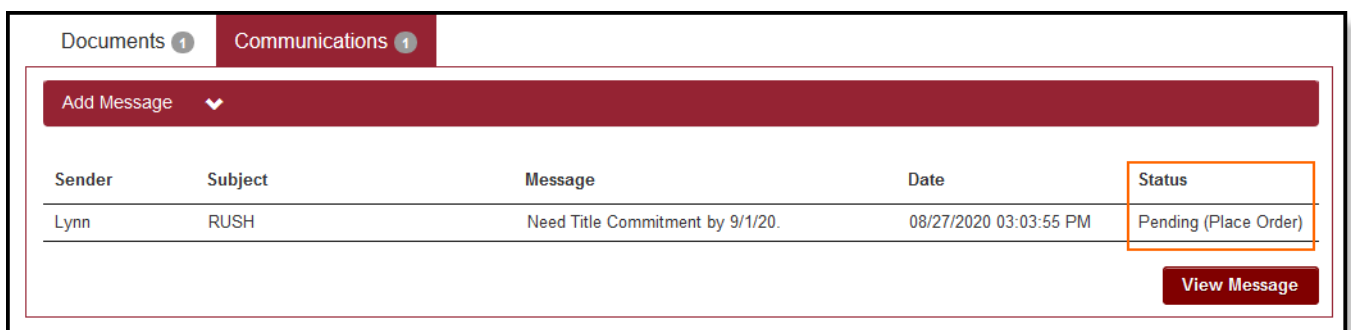
The screenshot shows the 'Add Message' form in the 'Communications' tab. The 'Subject' field contains 'RUSH' and the 'Message' field contains 'Need Title Commitment by 9/1/20.'. The 'Send Message' button is highlighted with an orange border.

5. A pop-up message will appear. Message(s) will be sent when **Place Order** is selected. Click **OK**.



The screenshot shows a pop-up message box with the title 'Lender Web Integrations'. The message text is 'Message(s) will be sent when Place Order is selected.' and the 'OK' button is highlighted with an orange border.

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.




The screenshot shows the 'Messages' list in the 'Communications' tab. The 'Add Message' button is collapsed. The table below shows a single message with the status 'Pending (Place Order)', which is highlighted with an orange border. The 'View Message' button is also visible.

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

7. Once all details are finalized, you are now ready to place the order. To do this, 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.




Loan Number: 2020080027
Welcome Lynn

Request Technical Support

Close

Place Order

Get Pricing Quote

 Thank you for your order. Escrow File Number is 576804

Messages

Welcome Back! Thank you for your order.

Place Order

Cancel Order

Get Pricing

User Guide

Select Office

Stewart Title of California, Inc.
750 University Ave
Ste 120
Los Gatos CA 95032
408-354-6010

☐ Centralized
☒ Local Office

Locate Office

Borrowers

Borrower: Don R Cooper JR.
CoBorrower:

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: 576804

Documents 1

Communications 1

Add Document

Name	Date	Status
Title Order Request.pdf	08/27/2020 03:09:15 PM	Sent

View

Download

Import to LQB

9. Click on Close and go back to LendingQB. The Stewart Office selected on your order will be added to your loan and will be displayed in **Agents** under **Status**.

LendingQB Welcome, Lynn Ramsey! Main Window Support Center Close

File calculation version: 32, latest: 33 more info
Back Forward Save Print Cooper, Marvin

Loan Officer: Lynn Ramsey Status: Loan Open Top: N/A LTV: 88.88% Rate: 0.000% Loan Type: Conventional
Loan Num: 281903094 Rate Lock Status: Not Locked Bottom: N/A CLTV: 88.88% HCLTV: 88.88% Total Loan Amt: \$400,000.00

Agents

INTERNAL ASSIGNMENT

Roles

Loan Officer	Loan Officer Assistant	Loan Opener	(assign)
Processor	Junior Processor	QC Compliance	(assign)
Underwriter	Junior Underwriter	Funder	(assign)
Doc Drawer	Collateral Agent	Lender Account Executive	(assign)
Lock Desk	Disclosure Desk	Purchaser	(assign)
Credit Auditor	Legal Auditor	Closer	(assign)
Secondary	Shipper	Servicing	(assign)
Insuring	Post-Closer	Call Center Agent	(assign)
Manager	Real Estate Agent		(assign)

External Agent Assignment
Loan Officer (External) (assign) Processor (External) (LO is required to be a PML user)
Secondary (External) (LO is required to be a PML user) Post-Closer (External) (Secondary (External) must be assigned)

OFFICIAL CONTACT LIST FOR THIS LOAN

Add People... Delete checked

Select	Type	Agent Name	Company Name	Phone	Email	Lender Affiliate?	Originator Affiliate?	
<input type="checkbox"/>	Underwriter		Stewart Title Branch			No	No	edit
<input type="checkbox"/>	Processor		Stewart Title Branch			No	No	edit
<input type="checkbox"/>	Loan Officer Assistant		Stewart Title Branch			No	No	edit
<input type="checkbox"/>	Manager		Stewart Title Branch			No	No	edit
<input type="checkbox"/>	Loan Officer		Stewart Title Branch			No	No	edit
<input type="checkbox"/>	Junior Processor		Stewart Title Branch			No	No	edit
<input type="checkbox"/>	Title		Stewart Title Company	(111)222-3333		No	No	edit

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10. You can click on **Edit** to see additional details. The **Escrow File Number** will appear in the Item Number field when **The service provider has a relationship with Lender** is checked.

Contact Information (7 of 7)

Contact Information

Loan Officer Licenses

Company Licenses

[Pick from Contacts](#) [Add to Contacts](#)

Contact Type

Title

Contact Name

Company Name

Stewart Title Company

Branch Name

Department Name

Company Address

3111 Unicorn Lake Blvd Ste 130

Denton

TX

76210

Company County

Company Phone

(940) 323-1500

Email

[send email](#)

☐

Send email when loan status changes

☐

Override agent and company licenses

Agent License #

for state:

OK

Company License #

Loan Originator NMLS ID

Loan Origination Company NMLS ID

Tax ID

Pay To

Bank Name

Bank City/State

ABA Number

Account Number

Account Name

Further Credit To

Account Number

Account Name

Commission

Loan Amt x 0.000%

+ Gross Profit x 0.000%

+ \$0.00

Commission Total =

\$0.00

☐ This company is the lender

☐ This company is the originator

☐ This company is an affiliate of the lender

☐ This company is an affiliate of the originator

☒ The service provider has a relationship with Lender

Item Number

159806

☐ The provider is an associate of Lender

☐ The provider is a relative of Lender

☐ The provider has an employment, franchise or other business relationship with Lender

☐ Within the last 12 months, the provider has maintained an account with Lender or had an outstanding loan or credit arrangement with Lender

☐ Within the last 12 months, Lender has repeatedly used or required borrowers to use the services of this provider

Notes

Copy info to 'Prepared By' fields on appropriate forms

[Which forms will be updated?](#)

Calculating Fees

With the interface open, complete the following steps to **Calculate Fees** from the **Stewart Rate Calculator** and receive a quote.




The preferred browser to open **Stewart Rate Calculator** with is **Internet Explorer 11**. Using any other internet browser may cause problems.

Steps

1. Select the **Get Pricing Quote** tab.

The *Stewart Rate Calculator* screen displays with pre-populated information for **Property Location**, and the **Transaction Type**. The information here will display according to the **Loan** you selected in LendingQB.



Loan Number: 2020080027
Welcome Lynn

Request Technical Support

Close

Place Order

Get Pricing Quote

Buyer Close Sheet

Seller Net Sheet

Title & Escrow Fee Estimate

Push Fees to Lending QB

Property Location	Los Gatos, CA, Santa Clara
Transaction Type	Sale/Purchase with Mort
Sales Price	\$800,000.00
Loan Amount	\$700,000.00
<input checked="" type="checkbox"/> Title Insurance Premium	⌵
<input checked="" type="checkbox"/> Endorsements/ Other Products	Select Products ⌵
<input type="checkbox"/> Title Service Fees	
<input checked="" type="checkbox"/> Recording Fees and Transfer Taxes	Select Fee and Tax Questions ⌵


Create Estimate

New Estimate



As of April 9, 2019, only **Sale/Purchase** or **Refinance** Transaction Types are available to select. Also, you do not need to enter information like **Street Address**, **Legal Description** or **Property Zip**; **Loan Amount** and **Sales Price** if the above highlighted fields are populated.

2. Enter the following information in the fields related to the quote:
 - Loan Amount - Buyer/Seller Percentages (If Transaction Type is Purchase)
 - Sale Amount - Buyer/Seller Percentages (If Transaction Type is Purchase)
 - Endorsements
 - Select Office
 - Select Governmental Fees
3. Click on **Create Estimate**.



Loan Number: 2020080027
Welcome Lynn

Request Technical SupportClose

Place OrderGet Pricing Quote

Push Fees to Lending QB

Buyer Close SheetSeller Net SheetTitle & Escrow Fee Estimate

Property Location	Los Gatos, CA, Santa Clara
Transaction Type	Sale/Purchase with Mortgage
Sales Price	\$800,000.00
Loan Amount	\$700,000.00
<input checked="" type="checkbox"/> Title Insurance Premium	
<input checked="" type="checkbox"/> Endorsements/ Other Products	Select Products
<input type="checkbox"/> Title Service Fees	Select Fee and Tax Questions
<input checked="" type="checkbox"/> Recording Fees and Transfer Taxes	Select Fee and Tax Questions

Create EstimateNew Estimate

4. Once the estimates are created, click on **Download PDF** to receive a copy in your **EDocs**:

Title Service Fees

Select Settlement Office

Recording Fees and Transfer Taxes

Select Fee and Tax Questions

Prepared By:

Name

Company

Address

City, State,& Zip

Email Address

someone@example.com

Phone Number

☐ Remember

Prepared For:

Name

Company

Email Address

someone@example.com

Note

☐ Remember

Download

Cancel



For your reference, click the **Download PDF** button to save a copy of the quotes from the *Stewart Rate Calculator* to your local machine before exiting the screen. This copy of the quotes will also be added to your **eDocs** folder in LendingQB when you import fees.

5. Click on **Push Fees to LendingQB** to import the following into LendingQB:

- TRID Premiums
- Endorsement Amounts
- Title Service Fees
- Recording Fees/Transfer Taxes

The screenshot shows the Stewart Title website interface. At the top, there's a header with the Stewart logo, loan number 2020080027, and a welcome message to Lynn. Below the header, there are buttons for 'Place Order' and 'Get Pricing Quote'. A red box highlights the 'Push Fees to Lending QB' button. Below this, there are buttons for 'Buyer Close Sheet', 'Seller Net Sheet', and 'Title & Escrow Fee Estimate'. The main form contains fields for 'Property Location' (Los Gatos, CA, Santa Clara), 'Transaction Type' (Sale/Purchase with Mortgage), 'Sales Price' (\$800,000.00), and 'Loan Amount' (\$700,000.00). There are also sections for 'Title Insurance Premium', 'Endorsements/ Other Products' (with a 'Select Products' link), 'Title Service Fees', and 'Recording Fees and Transfer Taxes' (with a 'Select Fee and Tax Questions' link). At the bottom, there are 'Create Estimate' and 'New Estimate' buttons.

6. A pop-up window will display the **Fee Comparison** between the **Current Fees** in LendingQB and the **New Fees** (if selected) that will be imported.

The screenshot shows a 'Fee Comparison' pop-up window. It includes the loan number 2020080030 and the borrower's name, James Cooper. Below this, it shows the status: 0 New, 6 Updates, 0 Deletes, and 0 Unmapped. The main table compares 'Current Fees' and 'New Fees'. Each row has a checkbox for selection. The fees listed are: 1103 - Owner's title insurance (\$915.00), 1104 - Lender's title insurance (\$1,225.00), and 1114 - CLTA 110.9-06 Environmental Protection Lien (\$25.00). Each fee entry includes a 'Payments' section indicating it is 'Paid By Borrower'.

	Current Fees	New Fees
<input type="checkbox"/>	1103 - Owner's title insurance \$915.00 Payments \$915.00 - Paid By Borrower	1103 - Owner's title insurance \$915.00 Payments \$915.00 - Paid By Borrower
<input type="checkbox"/>	1104 - Lender's title insurance \$1,225.00 Payments \$1,225.00 - Paid By Borrower	1104 - Lender's title insurance \$1,225.00 Payments \$1,225.00 - Paid By Borrower
<input type="checkbox"/>	1114 - CLTA 110.9-06 Environmental Protection Lien \$25.00 Payments \$25.00 - Paid By Borrower	1114 - CLTA 110.9-06 Environmental Protection Lien \$25.00 Payments \$25.00 - Paid By Borrower

7. Check the select all checkbox or the select fees you want to import and click on **Import Fees**.

<input type="checkbox"/>	\$550.00 Payments \$550.00 - Paid By Seller	<input type="checkbox"/>	\$550.00 Payments \$550.00 - Paid By Seller
<div style="display: flex; justify-content: center; gap: 20px;"> <div style="border: 2px solid orange; padding: 5px; background-color: #f0f0f0;">Import Fees</div> <div style="background-color: #800000; color: white; padding: 5px 15px;">Close</div> </div>			

8. The **Fees** and **PDF Copy** will be imported into your LendingQB file and a pop-up will display informing you that the import was successful. Click **OK** to close this pop-up.

<input checked="" type="checkbox"/>	1202 - Mortgage \$97.00 Payments \$97.00 - Paid By Seller
<input checked="" type="checkbox"/>	1202 - Deed record \$30.00 Payments \$30.00 - Paid By Seller
<input checked="" type="checkbox"/>	1204 - County tax \$550.00 Payments \$550.00 - Paid By Seller

Lender Web Integrations

The selected Title and Government Fees have been successfully imported to your loan.
An error occurred while uploading your Quote document. Please try again.

OK

Import Fees


Close



When you import for the first time, there may not be any **Current Fees** in the left column. At times, there will be instances where LendingQB will not have a matching fee to be imported. These fees are deleted in LendingQB by **checking** the **selection checkbox**, or kept if you **do not check** the **selection checkbox**.

<input type="checkbox"/>	Current Fees	New Fees
<input type="checkbox"/>	1103 - Owner's title insurance \$915.00 Payments \$915.00 - Paid By Borrower	1103 - Owner's title insurance \$915.00 Payments \$915.00 - Paid By Borrower
<input type="checkbox"/>	1104 - Lender's title insurance \$1,225.00 Payments \$1,225.00 - Paid By Borrower	1104 - Lender's title insurance \$1,225.00 Payments \$1,225.00 - Paid By Borrower
<input checked="" type="checkbox"/>	Selecting the check box in this section will delete the line in Lending QB	
<input type="checkbox"/>	1111 - Attorney fees \$500.00 Payments \$250.00 - Paid By Seller \$250.00 - Paid By Borrower \$0.00 - Paid By Borrower	
<input type="checkbox"/>	1109 - Document preparation fee \$400.00 Payments \$200.00 - Paid By Seller \$200.00 - Paid By Borrower	

9. Select **Place Order** to place another order or **Close Application** to go back to LendingQB.



Loan Number: 2020080027
Welcome Lynn

Request Technical Support
Close

Place Order
Get Pricing Quote

Buyer Close Sheet
Seller Net Sheet
Title & Escrow Fee Estimate

Push Fees to Lending QB

Property Location	Los Gatos, CA, Santa Clara		
Transaction Type	Sale/Purchase with Mortgage		
Sales Price	\$800,000.00		
Loan Amount	\$700,000.00		
<input checked="" type="checkbox"/> Title Insurance Premium			⌵
<input checked="" type="checkbox"/> Endorsements/ Other Products	Select Products		⌵
<input type="checkbox"/> Title Service Fees			
<input checked="" type="checkbox"/> Recording Fees and Transfer Taxes	Select Fee and Tax Questions		⌵

Create Estimate
New Estimate

- 10.** In LendingQB, you can view the imported fees in **Borrower-Responsible Closing Costs** under **Disclosure TRID**.

Borrower-response

Title	Description/Memo	Optional	APR	FHA	Paid to	DFLP	TP	AFF	Can Shop	Did Shop	Amount
<input type="checkbox"/>	Title - Courier Fee Type: Import-TF-1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Title	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	C \$65.00
<input type="checkbox"/>	Title - Guaranty Assessor Type: Import-TF-2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Title	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	C \$9.00
<input checked="" type="checkbox"/>	Closing/Escrow fee	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Title	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	C \$700.00
<input checked="" type="checkbox"/>	Lender's title insurance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Title	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	C \$1,983.00
<input checked="" type="checkbox"/>	T-19 Restrictions, Encroachment Type: Import-LE-1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Title	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	C \$99.15
<input checked="" type="checkbox"/>	T-30 Tax Deletion Type: Import-LE-2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Title	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	C \$20.00
<input checked="" type="checkbox"/>	T-36 Environmental Protection Type: Import-LE-3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Title	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	C \$25.00
<input checked="" type="checkbox"/>	TX Not Yet Due - R24c Type: Import-LE-4	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Title	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	C \$5.00

11. The imported Stewart Rate Calculator quote will be viewable in the **Stewart Title Documents** folder in **Document List** under **EDocs**.

The screenshot displays the LendingQB EDocs interface. On the left is a navigation menu with categories: Servicing, Insuring, EDocs, and FHA. The 'EDocs' category is expanded, and 'Document List' is highlighted. The main window shows a browser view of the EDocs system. At the top, there are fields for 'Agent License #', 'for state: VA', and 'Case Number'. Below this is a search bar and a 'Show documents from' dropdown set to 'All Folders'. The view is set to 'stack order'. A table lists documents with columns: Status, Folder, Doc Type, Borrower, Description, Internal Comments, Associated Conditions, Pages, Last Modified, Uploaded Date, and Uploaded By. Four documents are listed, all under the 'STEWART TITLE DOCUMENTS' folder, with 'Doc Type' as 'STEWART TITLE RATE QUOTE' and 'Description' as 'Stewart Title Rate Quote'. The first document is selected. At the bottom, there are buttons for 'Restore deleted docs...', 'Batch edit selected docs', 'Copy selected docs to loan file', and 'Create editable copies'.

Status	Folder	Doc Type	Borrower	Description	Internal Comments	Associated Conditions	Pages	Last Modified	Uploaded Date	Uploaded By
<input type="checkbox"/>	action...	STEWART TITLE DOCUMENTS	Sally Cooper	Stewart Title Rate Quote			4	3/19/2019 3:45:26 PM	3/19/2019 3:45:27 PM	Lynn Ramsey
<input type="checkbox"/>	action...	STEWART TITLE DOCUMENTS	Sally Cooper	Stewart Title Rate Quote			4	3/19/2019 3:45:48 PM	3/19/2019 3:45:48 PM	Lynn Ramsey
<input type="checkbox"/>	action...	STEWART TITLE DOCUMENTS	Sally Cooper	Stewart Title Rate Quote			4	3/19/2019 3:46:17 PM	3/19/2019 3:46:17 PM	Lynn Ramsey
<input checked="" type="checkbox"/>	action...	STEWART TITLE DOCUMENTS	Sally Cooper	Stewart Title Rate Quote			4	3/19/2019 3:50:25 PM	3/19/2019 3:50:25 PM	Lynn Ramsey

Documents

Stewart Title can send documents through the **Stewart Title Integration**. Follow these steps to do so:

Sending Documents in Place Order

Use the steps below to send documents after an order is placed:

Steps


1. In *Place Order*, select the **Documents** tab.
2. From the *Documents* tab, click the Caret Symbol ^ to expand the screen. You must add a document before the order is initiated.
3. In the **Select Document** option, choose the **Document Type**.
4. In the *Description* field, insert a Description (optional).
5. Click **Send Document**.

The screenshot shows a form titled "Add Document" with a caret symbol (^) to its right. The form has two radio buttons under the heading "Select Document *": "from File System" (which is selected) and "from LendingQB". To the right of the "from File System" radio button is a "Browse..." button and the text "No file selected.". Below the radio buttons is a text input field labeled "Description". At the bottom left of the form, there is a note: "*Each document cannot exceed 20 MB". At the bottom right, there are two buttons: "Send Document" and "Clear". The "Send Document" button is highlighted with an orange border.

6. A pop-up message will appear. Documents has been sent. Click **OK**.

The screenshot shows a pop-up message box with a dark red header that says "Lender Web Integrations". Below the header, the text "Document has been sent." is displayed. At the bottom right of the box, there is an "OK" button highlighted with an orange border.

7. The Status on the Document screen will display the status of the document.




Loan Number: 2020080027
Welcome Lynn

Request Technical Support

Close

Place Order

Get Pricing Quote

 Thank you for your order. Escrow File Number is 576804

Messages

Welcome Back! Thank you for your order.

Place Order

Cancel Order

Get Pricing

User Guide

Select Office

Stewart Title of California, Inc.
750 University Ave Ste 120
Los Gatos CA 95032
(408) 354-6010

☐ Centralized
☒ Local Office

Locate Office

Borrowers

Borrower: Don R Cooper JR.
CoBorrower:

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: 576804

Documents 3

Communications 1

Add Document

Name	Date	Status
Title Order Request.pdf	08/27/2020 03:09:15 PM	Sent
City National Bank Wire Instructions.pdf	08/27/2020 03:44:39 PM	Received
Title Commitment.pdf	08/27/2020 05:31:33 PM	Received

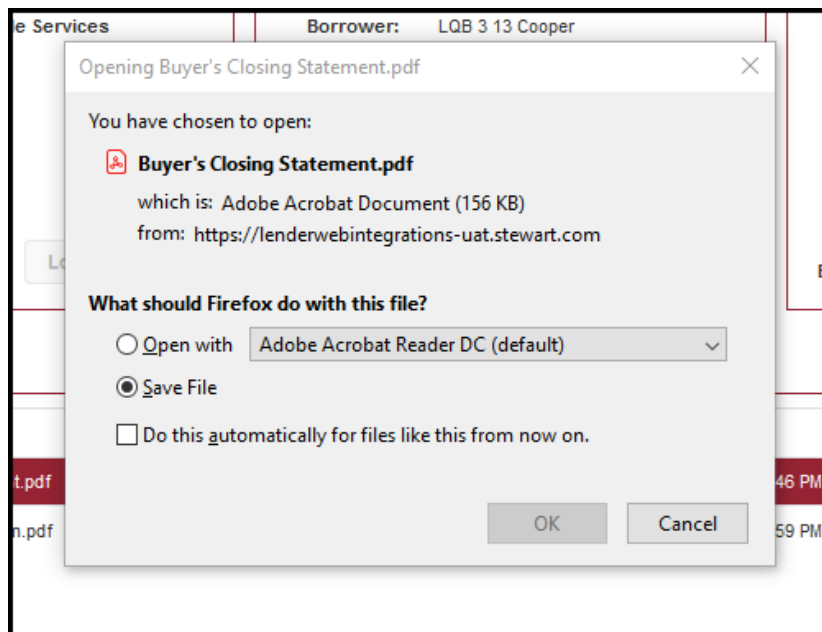
View

Download

Import to LQB

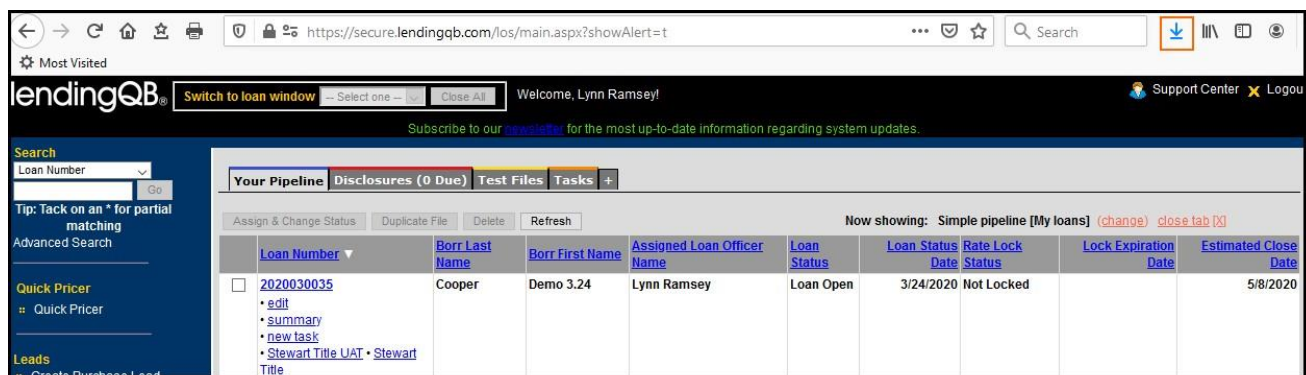
8. Here you will have three options. Click on **View** to view the document, or on **Download** to download the document to your computer. Clicking on **Import into LQB** will send it into your Loan in LendingQB.

9. Clicking on **Download** will display a pop-up window to download the document.



The screenshot above is taken when downloading with **Mozilla Firefox**. When using **Internet Explorer** or **Google Chrome**, you will see a different pop-up window but with the same options.

10. When the file is finished downloading, you can view them from the **Download** menu of your internet browser.



The screenshot above is taken when a document is finished downloading in **Mozilla Firefox**. When using **Internet Explorer** or **Google Chrome**, the downloaded file's notification will show up at the bottom of the screen.

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 Lender Web Integrations interface. At the top, the Stewart logo is on the left, and the loan number 2020080027 and user name Lynn are on the right. Below the logo, there are two tabs: 'Place Order' and 'Get Pricing Quote'. A message bar says 'Thank you for your order. Escrow File Number is 576804'. On the right, there are buttons for 'Place Order', 'Cancel Order' (highlighted with an orange border), 'Get Pricing', and 'User Guide'. The main content area is divided into three sections: 'Select Office' with a list of offices and a 'Locate Office' button; 'Borrowers' with fields for 'Borrower' (Don R Cooper JR.) and 'CoBorrower'; and 'Property Information' with fields for 'Address' (346 Bellaire, Los Gatos CA 95030) and 'County' (Santa Clara). On the right, there is a 'Loan Information' section with fields for 'Loan Number', 'Loan Type', 'Loan Purpose', 'Loan Amount', 'Purchase Price', 'Estimated Closing', and 'Escrow File Number'. At the bottom, there are buttons for 'Documents' (3) and 'Communications' (1).

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 reads: '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' (highlighted with an orange border).

3. A **Cancel Order** window will appear.

4. In the *Comments* field, enter your reason for cancellation. Click **Submit**.

Cancel Order

Property Address 22814 Crested Lark Ct
Katy TX 77450

Loan Number 575144
Borrower Carol Snapka

County HARRIS
CoBorrower

Comments * Application Denied

Submit Cancel

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

Lender Web Integrations

Your order has been cancelled.

OK

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

stewart Loan Number: 2020080027
Welcome Lynn Request Technical Support Close

Place Order Get Pricing Quote

Your order has been cancelled. Escrow File Number is 576804

Messages
Welcome back! This order has been cancelled. You may place a new order for this loan by clicking the 'Place Order' button.

Place Order Cancel Order
Get Pricing User Guide

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

Send Messages

Use the steps below to send Messages after an order is placed:

Steps

1. In the Stewart Integration, click on the **Communications** tab.
2. From the **Communications** tab, click the Carrot symbol ▼ to expand the screen. You must add a document before the order is initiated.
3. In the *Subject* field, type in a subject.
4. In the *Message* field, type in a message.
5. Click **Send Message**.

Documents 3 Communications 2

Add Message ^

Subject * Test Msg for Order x

Message * Test Message after Order Sent

Send Message Clear

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

Lender Web Integrations

Message has been sent.

OK

7. The Status on the Message screen will display the status.

Sender	Subject	Message	Date	Status
Calyx Path User	Test Msg 1	Sent with Place Order	07/16/2020 10:38:29 AM	Sent
Calyx Path User	Test Msg 2	Sent with Place Order	07/16/2020 10:38:30 AM	Sent
Calyx Path 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.

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Communications5

Add Message

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

View Message

Technical or Transactional Support

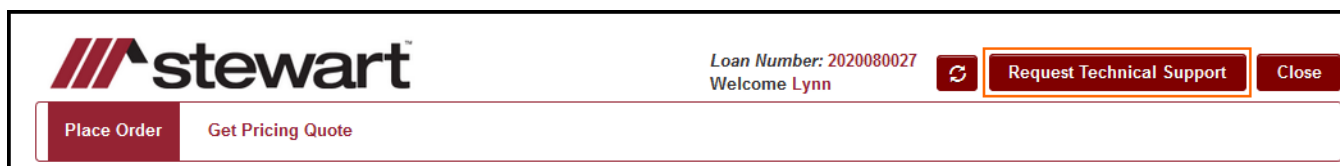
For technical or transactional support click the links within the *Stewart Title Company* interface for assistance.



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 Stewart Title 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.