LendingQB Integration with Stewart

User Guide

July 12, 2022

Table of Contents

Introduction **3**
Prerequisites 3
Username and Password Setup 4
Access to Email 4
Browser Compatibility 4
Quotes for Title Fees – Closing Cost Fee Setup 5
Documents – Setup 7
Documents – Setup StewartAPI Employee to import directly into EDocs 8
Launching the Interface **9**
Placing an Order **10**
Finding an Office 11
Send Documents with Place Order 13
Send Messages with Place Order 15
Calculating Fees **19**
Documents **26**
Sending Documents in Place Order 26
Cancel Orders 3
Send Messages **5**
Receive Messages **6**
Technical or Transactional Support **7**
Request Technical Support 7
Thank You 7

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**.

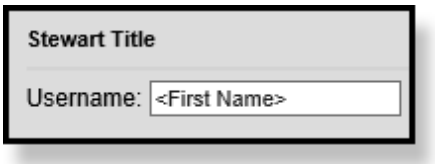
Prerequisites

Stewart Unique ID and Stewart Title Integration Access Setup

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

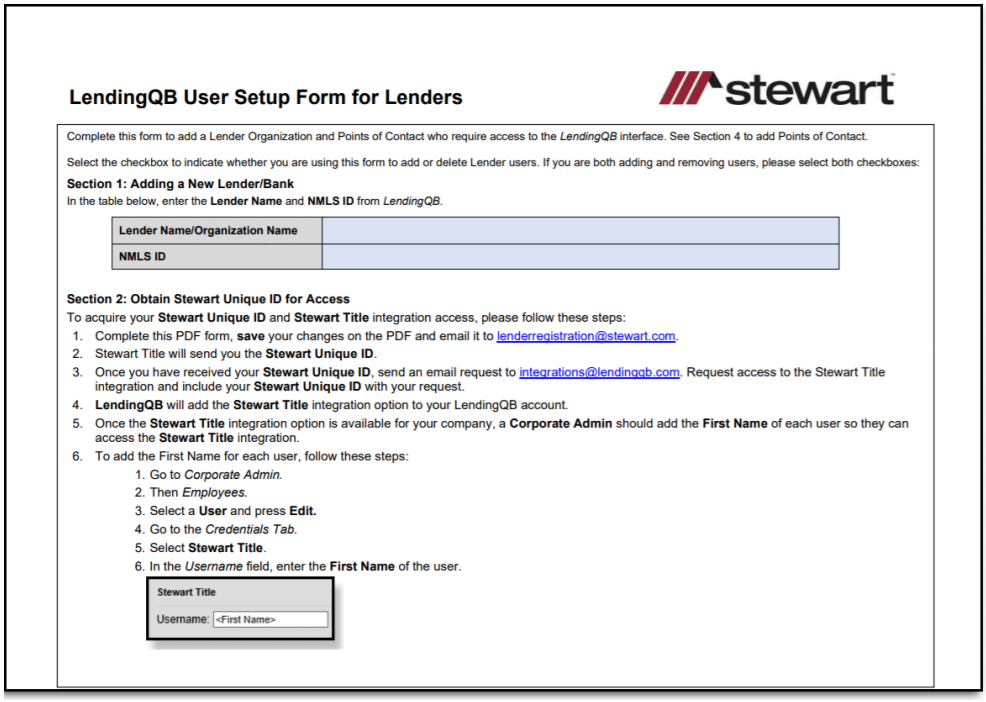
Steps

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



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

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

C - Services You Can Shop For

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

3. 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.

E - Taxes And Other Government Fees

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

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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	☐	☑	Import-OE-3	B6	H	☐	☐	Title	☐	☐		☑	Blank
1311	☐	☑	Import-TF-10	B6	H	☐	☐	Title	☐	☐		☑	Blank
1312	☐	☑	Import-TF-11	B6	H	☐	☐	Title	☐	☐		☑	Blank
1313	☐	☑	Import-TF-12	B6	H	☐	☐	Title	☐	☐		☑	Blank
1314	☐	☑	Import-TF-13	B6	H	☐	☐	Title	☐	☐		☑	Blank
1315	☐	☑	Import-TF-14	B6	H	☐	☐	Title	☐	☐		☑	Blank
1316	☐	☑	Import-TF-15	B6	H	☐	☐	Title	☐	☐		☑	Blank
1317	☐	☑	Import-TF-16	B6	H	☐	☐	Title	☐	☐		☑	Blank
1307	☑	☐	Import-OE-1	B6	H	☐	☐	Title	☐	☐		☑	Other Fee
1308	☑	☐	Import-OE-2	B6	H	☐	☐	Title	☐	☐		☑	Other Fee
1310	☑	☐	Import-TF-9	B6	H	☐	☐	Title	☐	☐		☑	Other Fee
1304	☑	☐	Other 3	B6	H	☐	☐	Surveyor	☐	☐		☑	Other Fee
1305	☑	☐	Other 4	B6	H	☐	☐	Title	☐	☐		☑	Other Fee
1306	☑	☐	Other 5	B6	H	☐	☐	Title	☐	☐		☑	Other Fee
1103	☑	☐	Owner's title insurance	B5	H	☐	☐	Title	☐	☐		☐	Title Owners Coverage Premium

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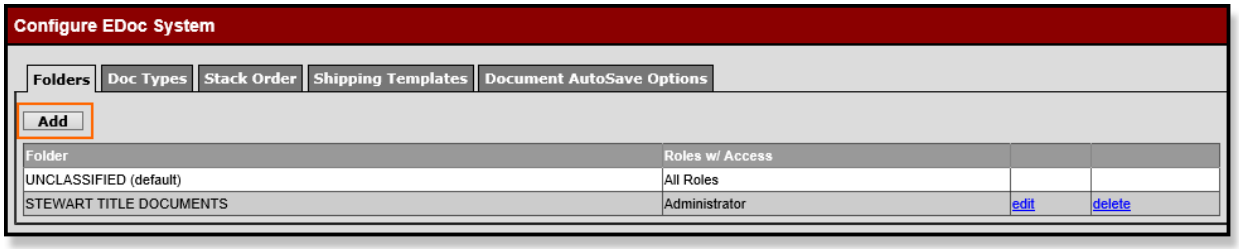
All information must be **correctly** entered in the *Description/Memo fields* or the integration will not work properly. **Predefined Title Fees** will map accordingly. If you check any checkboxes, they will not be overwritten.

Documents – Setup

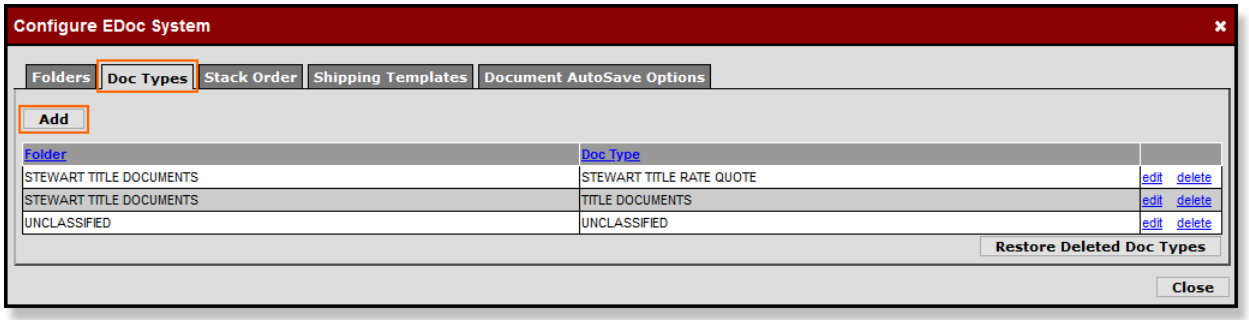
Complete the following steps to properly setup a folder for all Stewart documents in **LendingQB**:

Steps

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



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

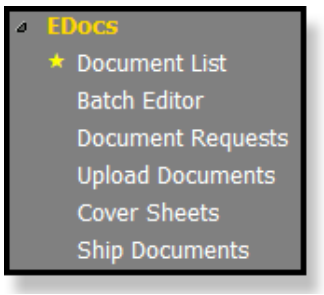


4. Select the Folder **STEWART TITLE DOCUMENTS**.
5. Name the Doc Type as **STEWART TITLE RATE QUOTE**.
6. Name the Doc Type as **TITLE DOCUMENTS**.
7. Select **Close**.

Documents – Setup StewartAPI Employee to Import Directly into EDocs

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.

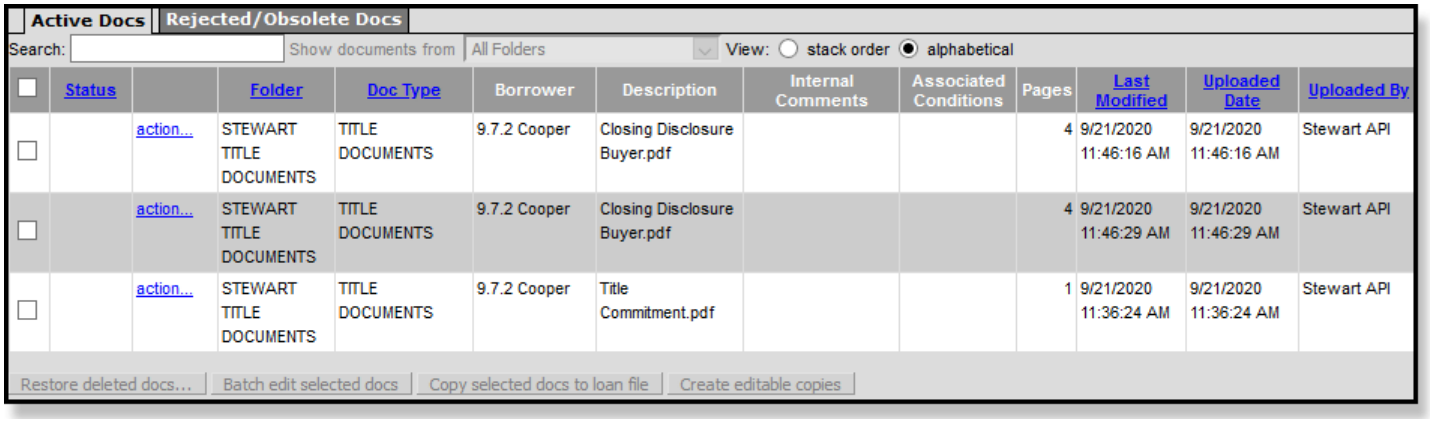
The documents will appear in the EDocs section.



Document List screen

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

Note: These documents will appear in **LendingQB EDocs** and also on the **Stewart Integration** page.



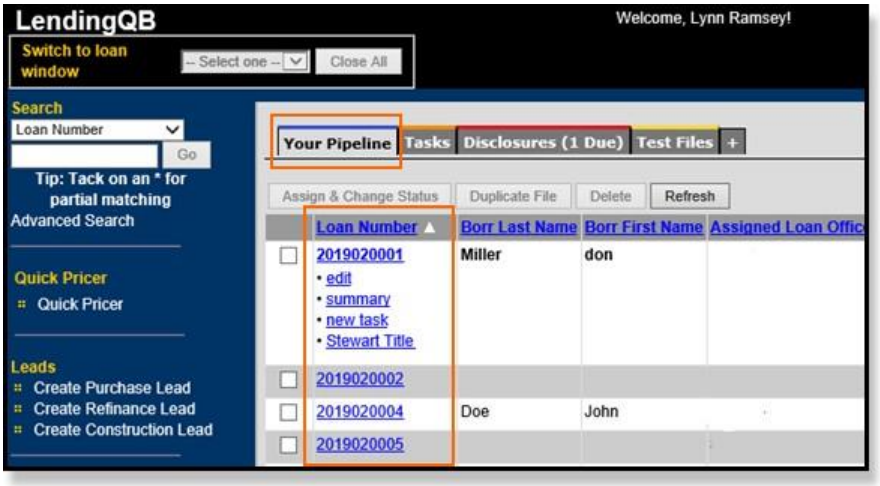
Status		Folder	Doc Type	Borrower	Description	Internal Comments	Associated Conditions	Pages	Last Modified	Uploaded Date	Uploaded By
	action...	STEWART TITLE DOCUMENTS	TITLE DOCUMENTS	9.7.2 Cooper	Closing Disclosure Buyer.pdf			4	9/21/2020 11:46:16 AM	9/21/2020 11:46:16 AM	Stewart API
	action...	STEWART TITLE DOCUMENTS	TITLE DOCUMENTS	9.7.2 Cooper	Closing Disclosure Buyer.pdf			4	9/21/2020 11:46:29 AM	9/21/2020 11:46:29 AM	Stewart API
	action...	STEWART TITLE DOCUMENTS	TITLE DOCUMENTS	9.7.2 Cooper	Title Commitment.pdf			1	9/21/2020 11:36:24 AM	9/21/2020 11:36:24 AM	Stewart API

Launching the Interface

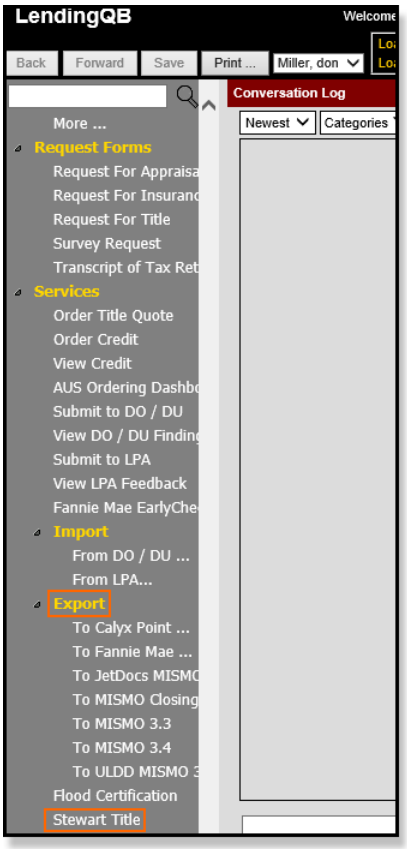
Once the integration is setup, you are ready to **Place Order** with Stewart Title or import **Fees** from **Stewart Rate Calculator** into **LendingQB**.

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.

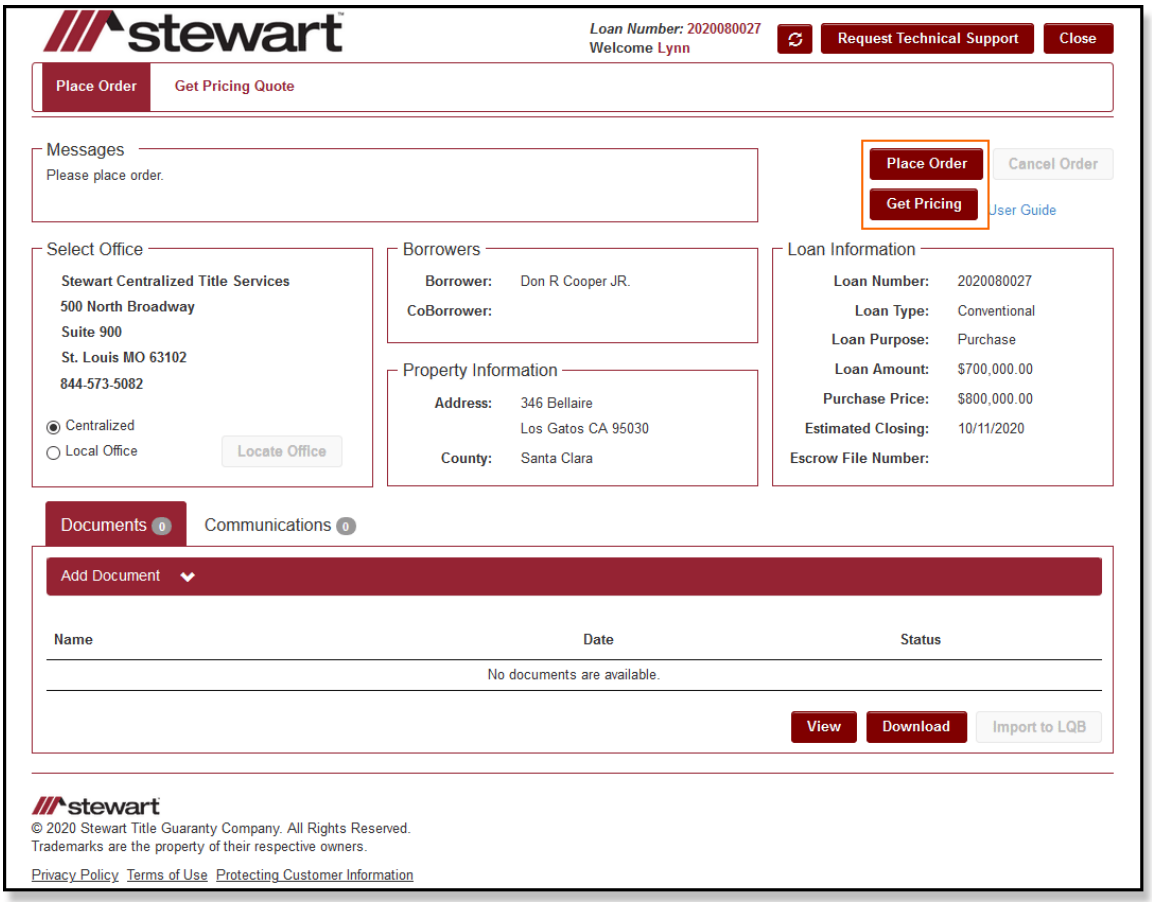


Placing an Order

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

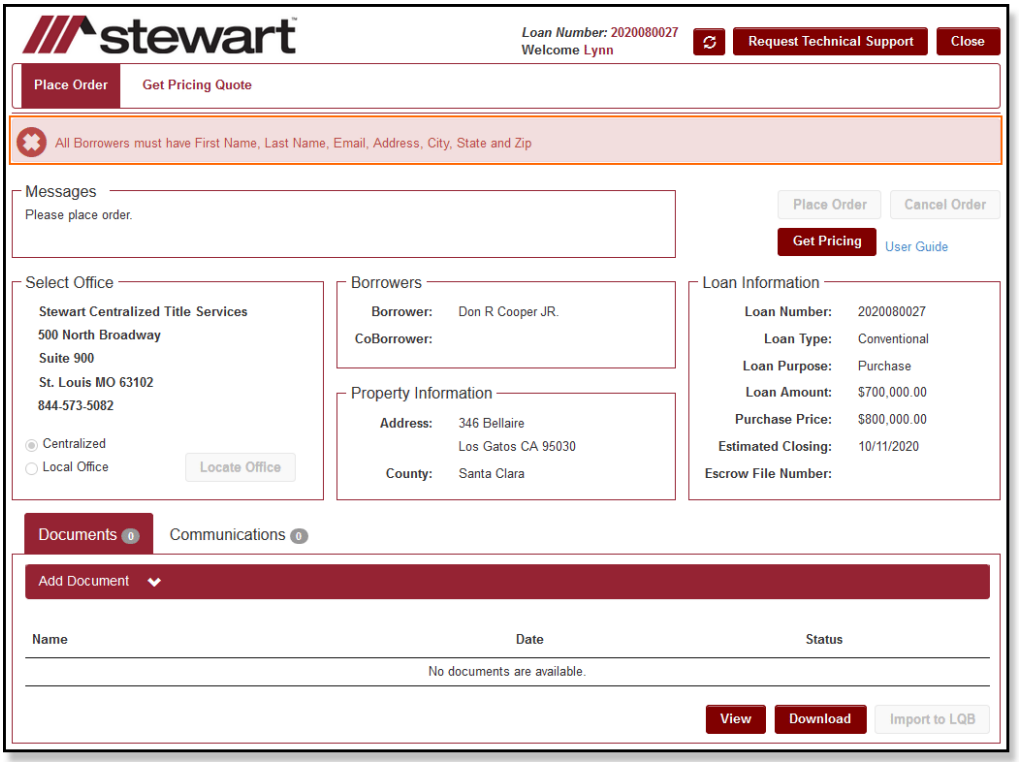
Steps

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.



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

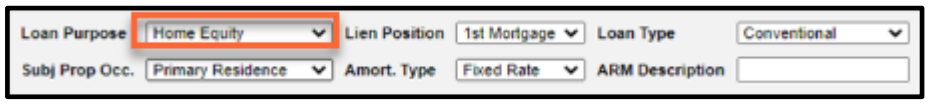
3. An order needs some mandatory information to process. If this information is missing from the loan details, an **error message** will appear on the top which will let you know what is missing. Close the Stewart Title page and go back to LendingQB to enter the missing information. Then re-launch the Stewart Title page again from LendingQB.



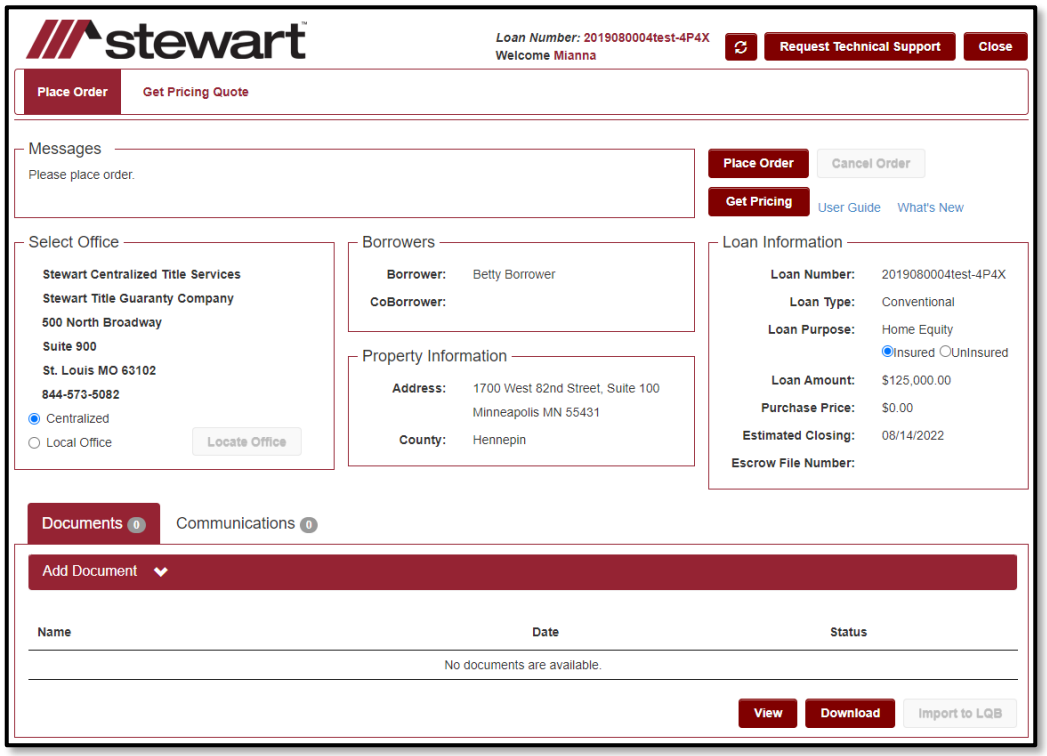
4. Depending on your access type, an office may be pre-selected. If not, you can use the **Locate Office** feature to select the office and place your **Title and Escrow** request.

5. For **Home Equity** Loans, additional steps are required:

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

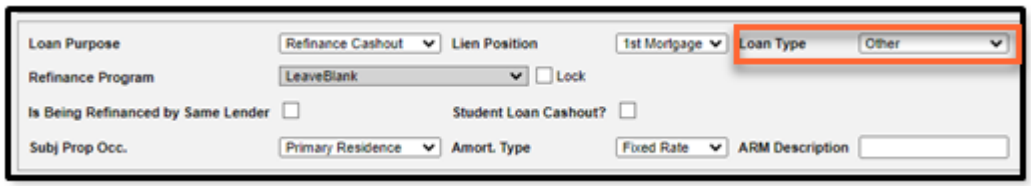


   - The Stewart Integration page shows **Home Equity** as the Loan Purpose.
   - Two new required options will appear:

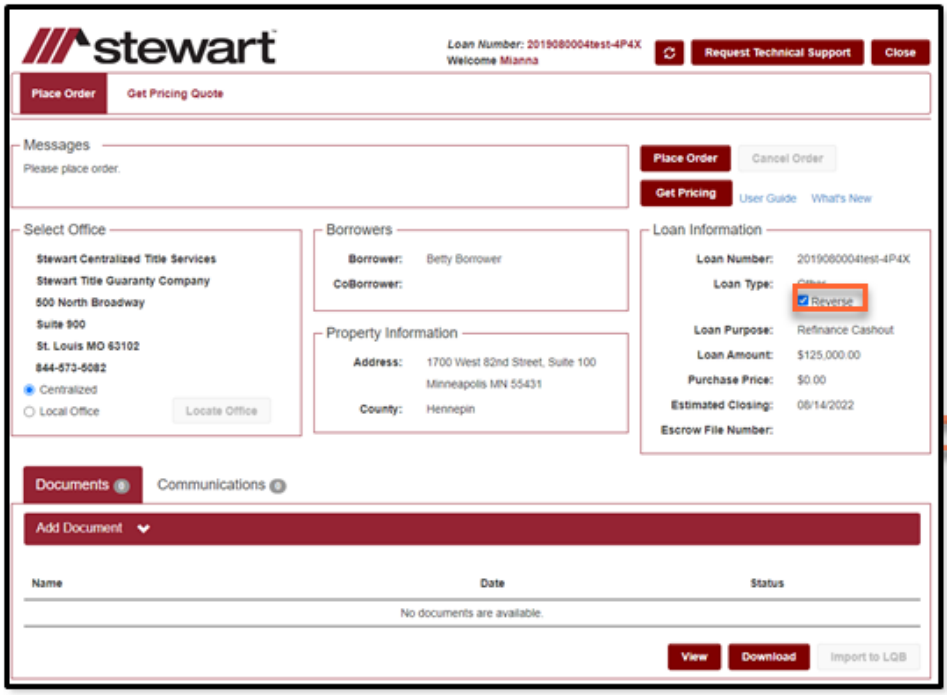


- **Insured** – Title Insurance is need on this loan
- **Uninsured** – Title Only, no insurance Title Search Only (ie – Property Report, Owner & Encumbrance Report aka O&E, etc) – no Title Insurance

6. For **Reverse Loans**, additional steps are required:
   - When **Loan Type** in **LendingQB** is *Other*



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



Finding an Office

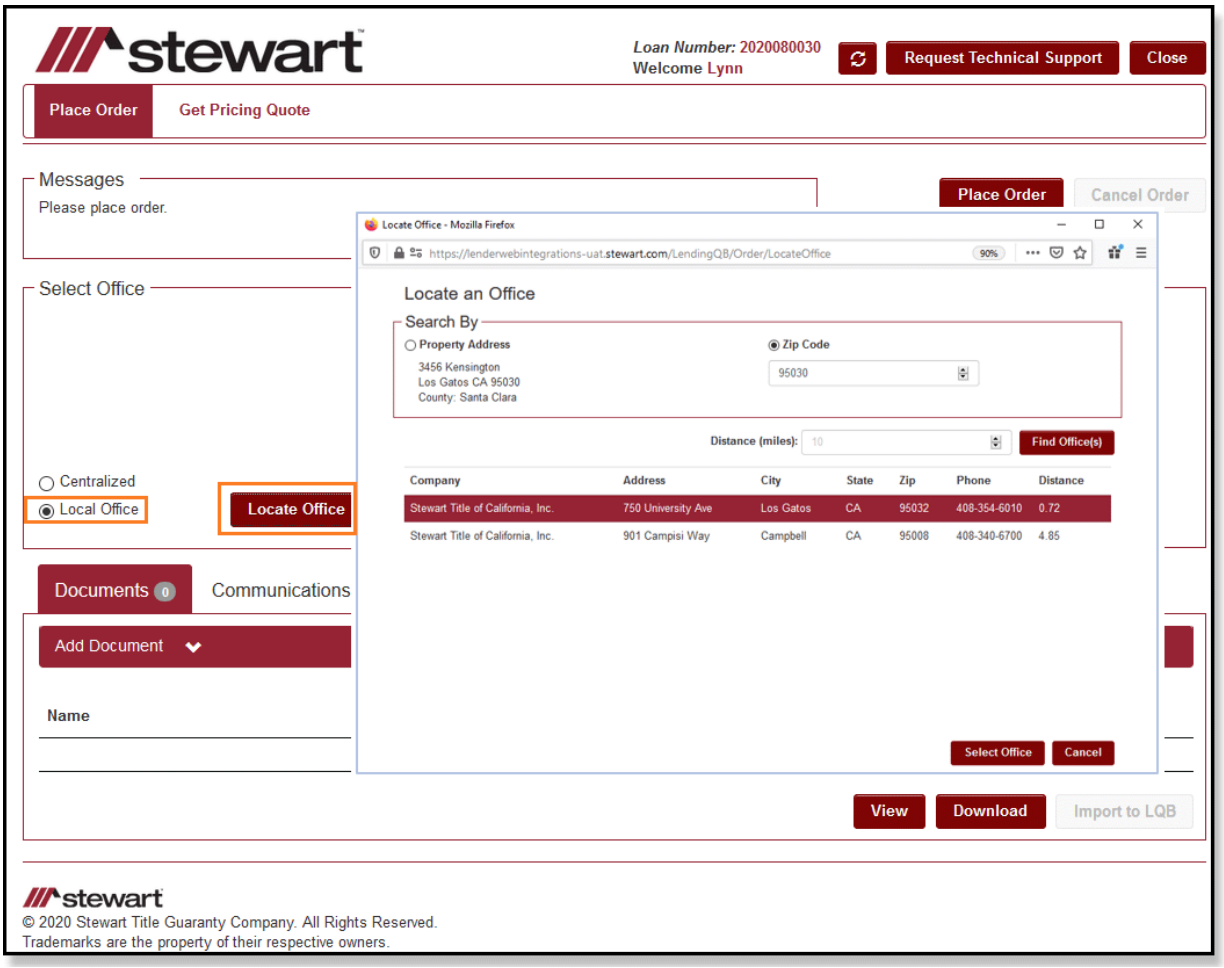
Complete the following steps to find an office:

Steps

1. Under *Locate Office,* click **Locate Office**.

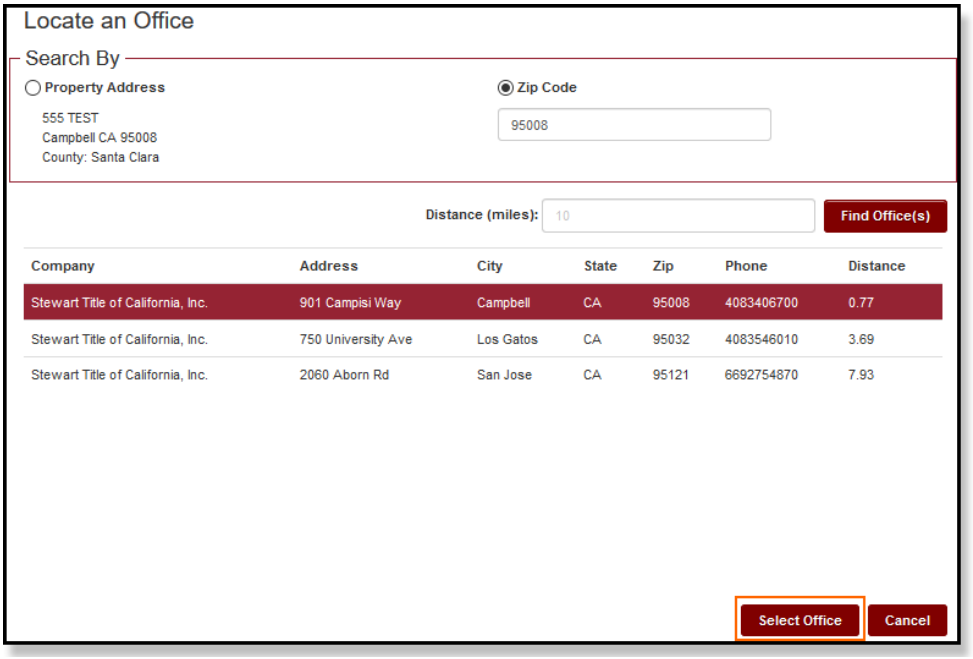
2. Select from either **Property Address** to search for an office close to the property, or **Zip Code** to search for an office within a Zip code area.

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)**.



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**.



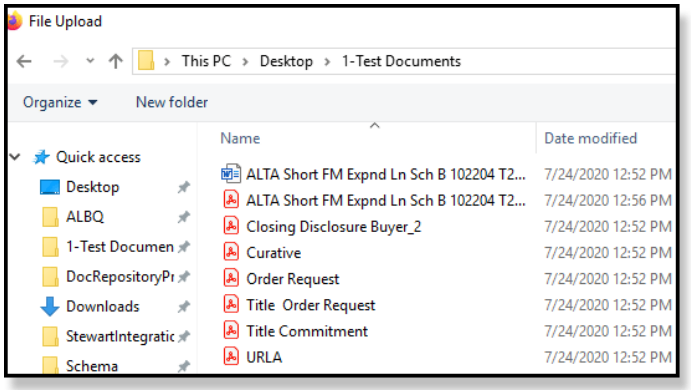
5. When an office is selected, its name and details will show up within the **Select Office** section. You may change this any time before placing the order.

Send Documents with Place Order

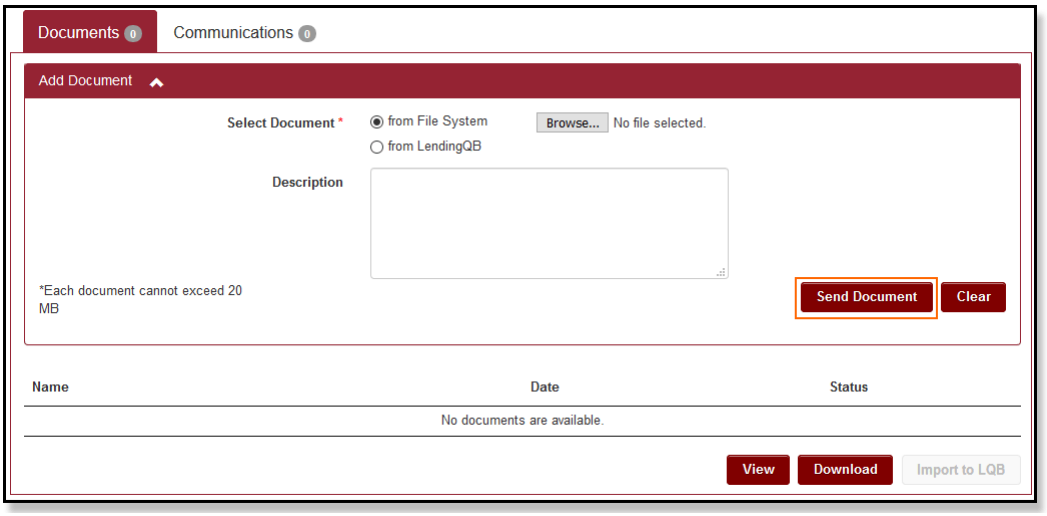
Use the steps below to send documents with **Place Order**:

Steps

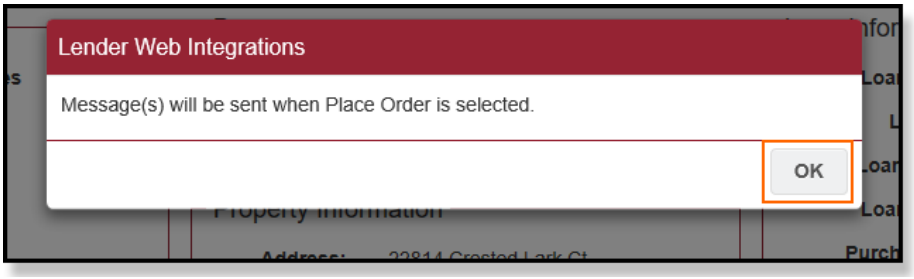
1. In *Place Order*, click the **Documents** tab.
2. From the *Documents* tab, click the Caret Symbol ⮟ to expand the screen.
3. Select the **Document Type** and enter the **Description** (optional). You must add a document before the order is initiated, by click on **Browse**.



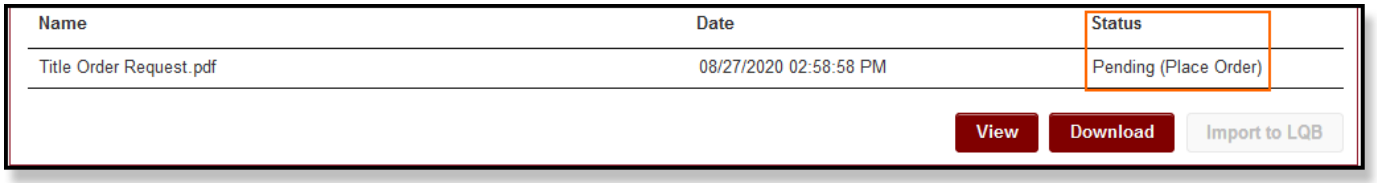
4. Click **Send Document**.



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

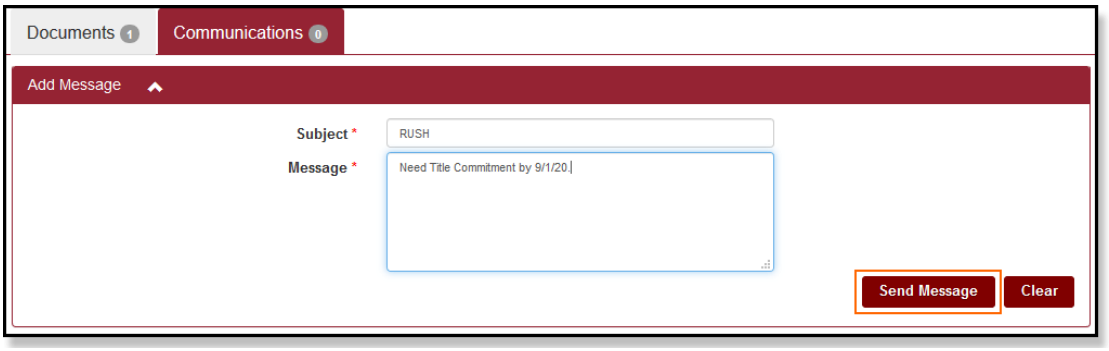


Send Messages with Place Order

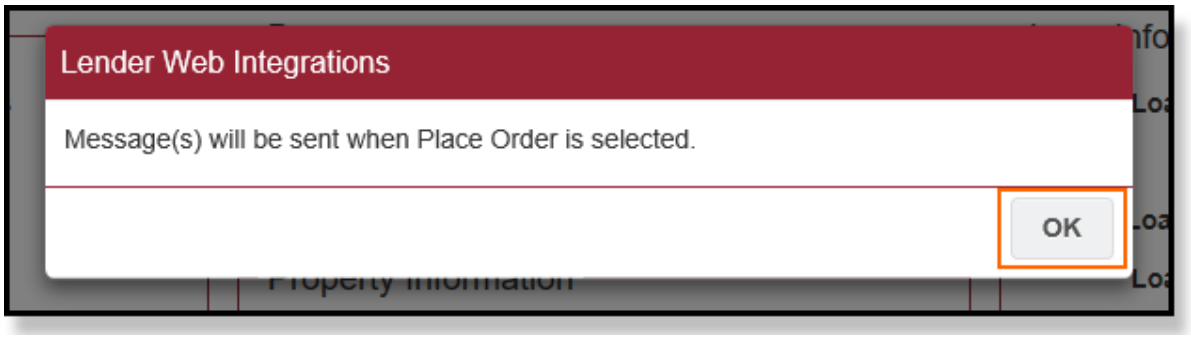
Use the steps below to send messages with **Place Order**:

Steps

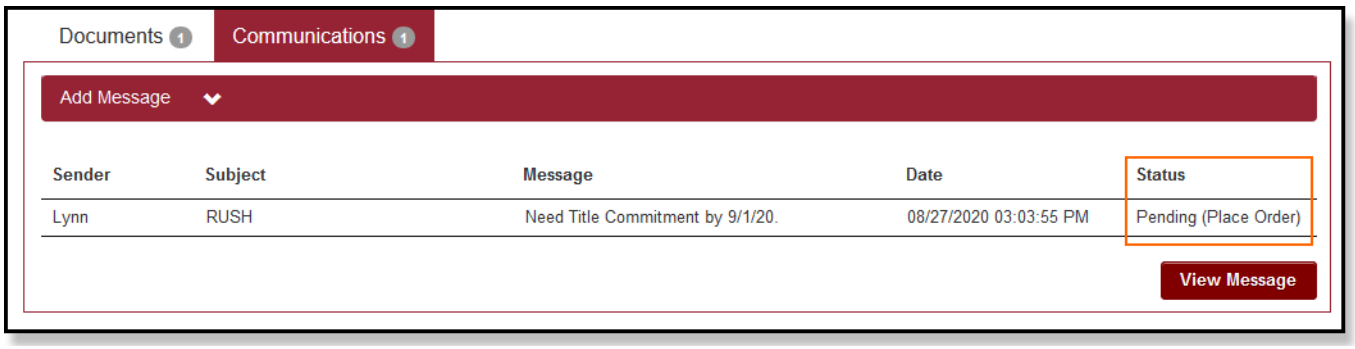
1. In *Place Order*, click the **Communications** tab.
2. From the **Communications** tab, click the Caret Symbol ⮟ to expand the screen. You must add a document before the order is initiated.
3. In the *Subject* field, enter your subject. In the *Message* field, type in the message.
4. Click **Send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



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

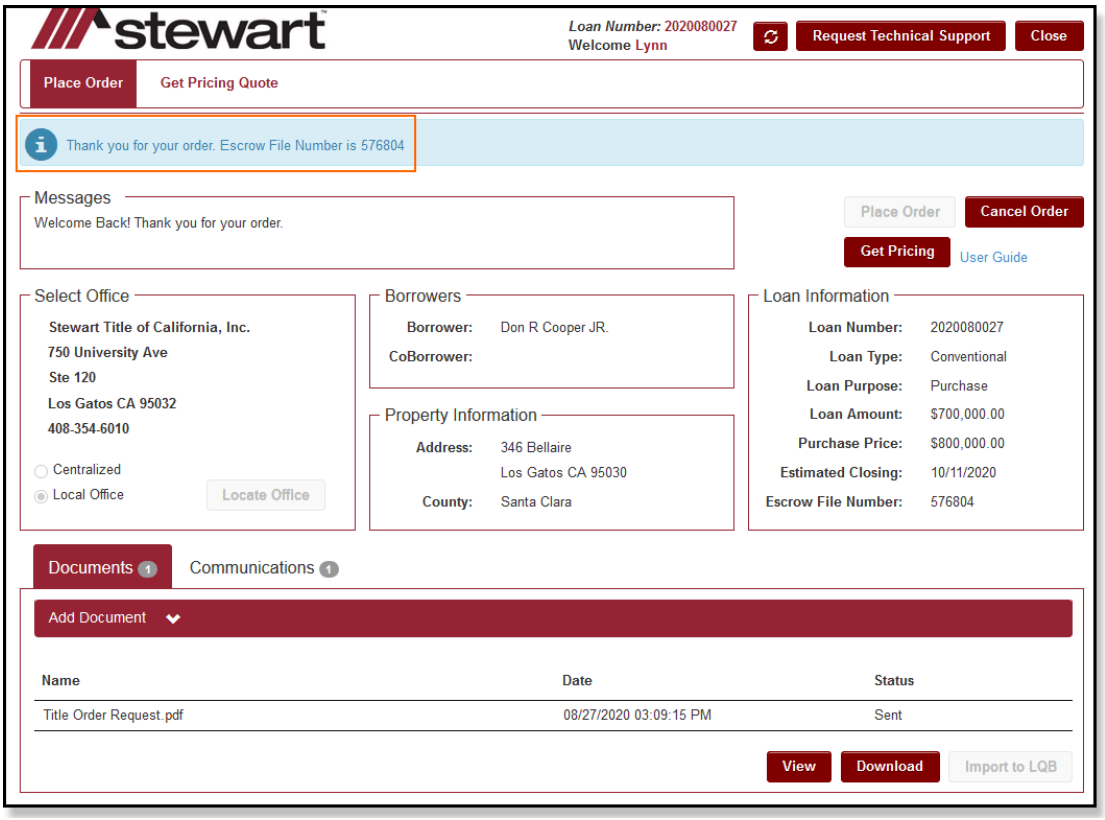


6. The **Status** on the Message screen will be set to **Pending (Place Order)** or **Pending (Escrow #)** until an **Escrow Number** comes back from ResWare.

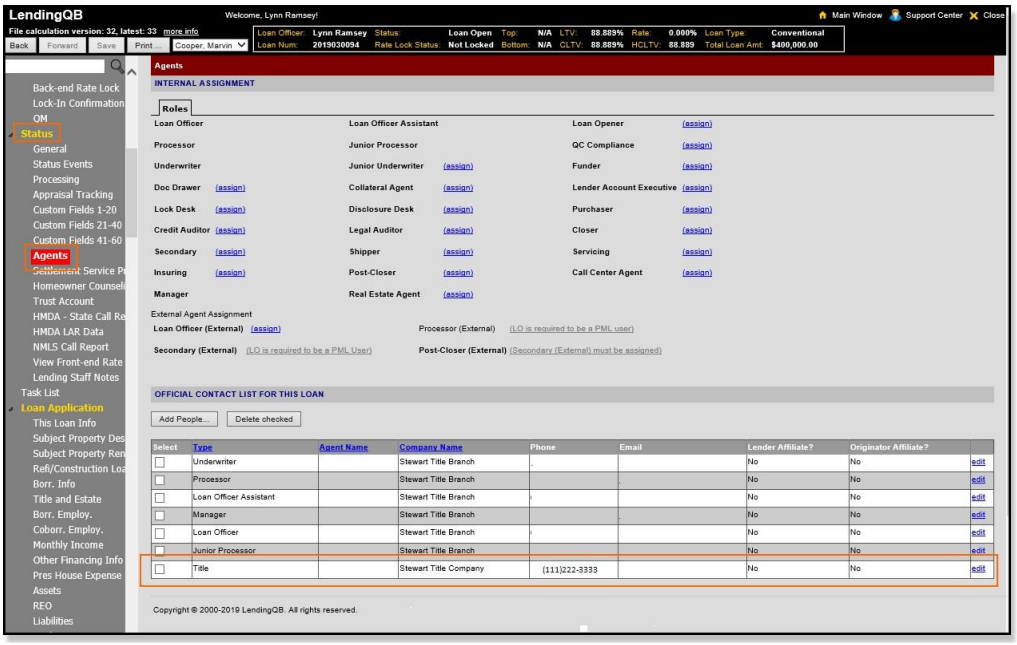


7. Once all details are finalized, you are now ready to place the order. To do this, click on **Place Order**.

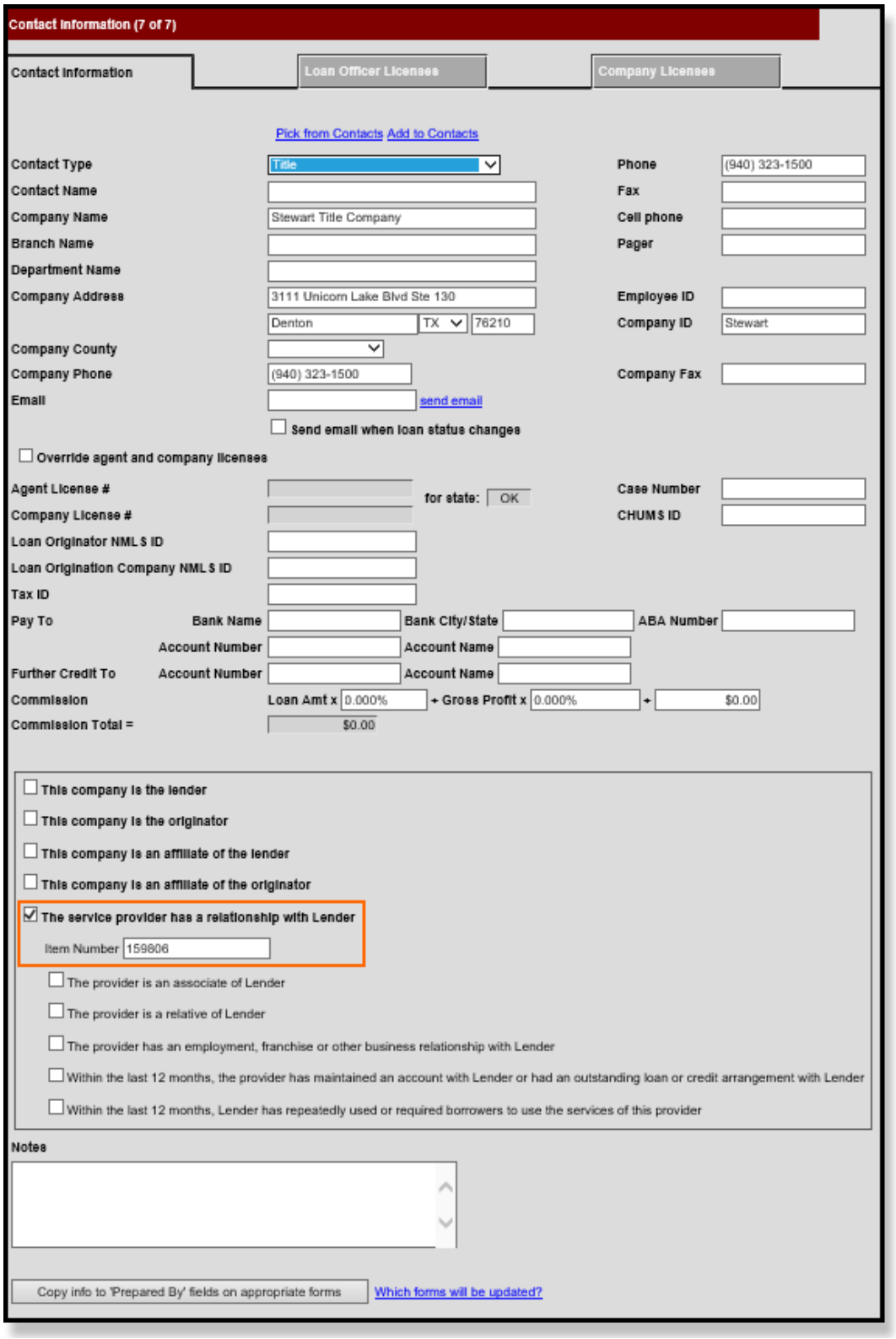
8. The page will refresh and you will receive an **Assigned Escrow File Number**. This number will take some time to show up.



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**.



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.



Calculating Fees

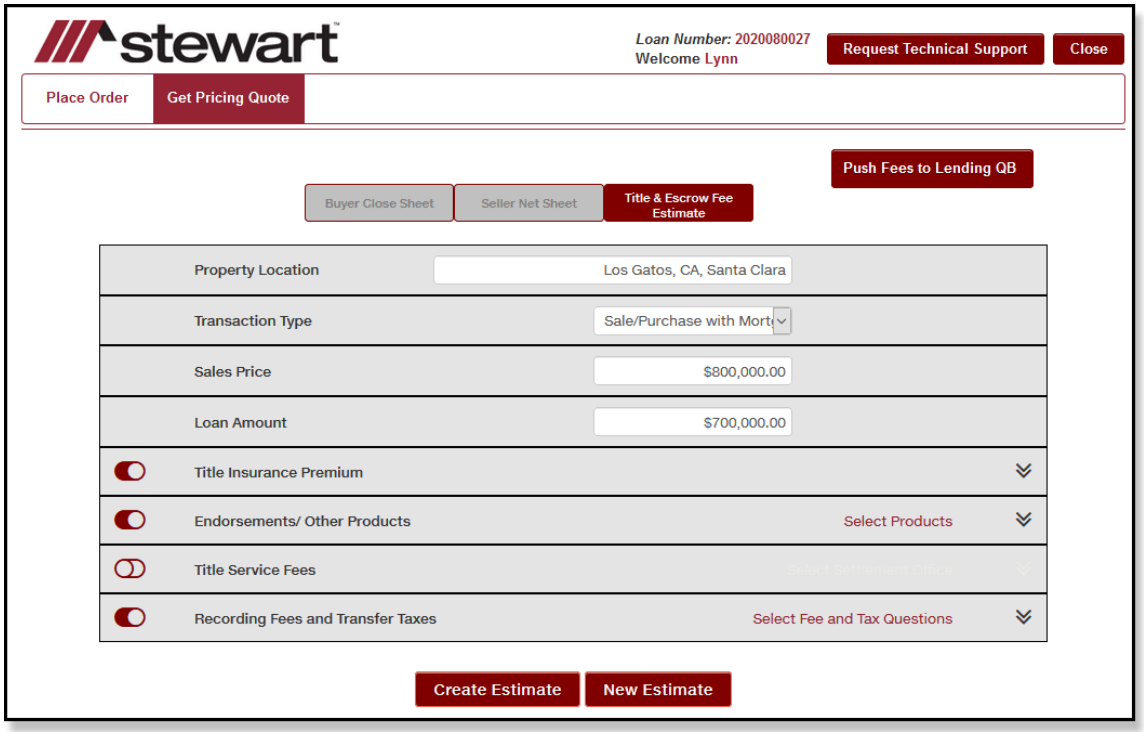
With the interface open, complete the following steps to **Calculate Fees** from the **Stewart Rate Calculator** and receive a quote.

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

Steps

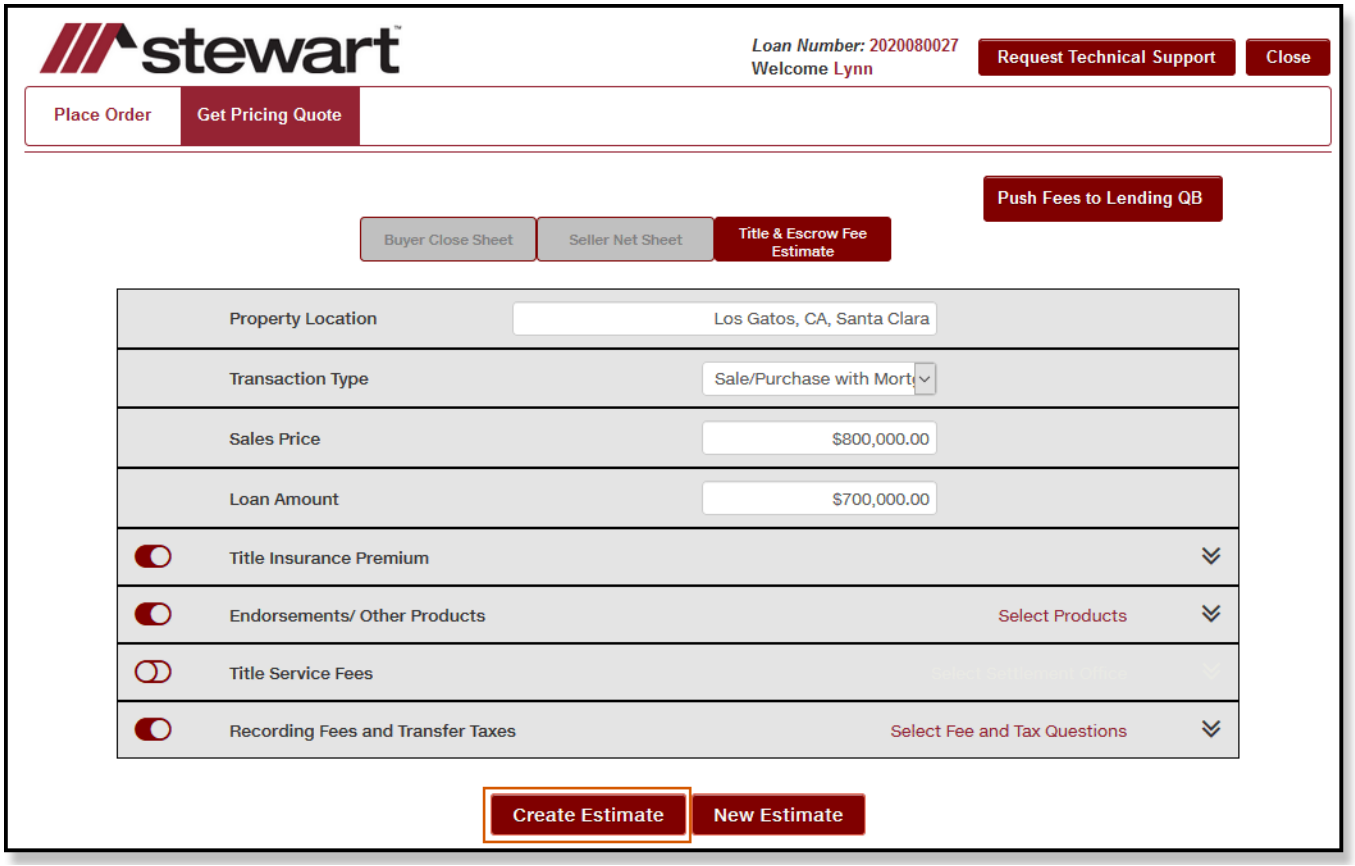
1. Select the **Get Pricing Quote** tab.

   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.

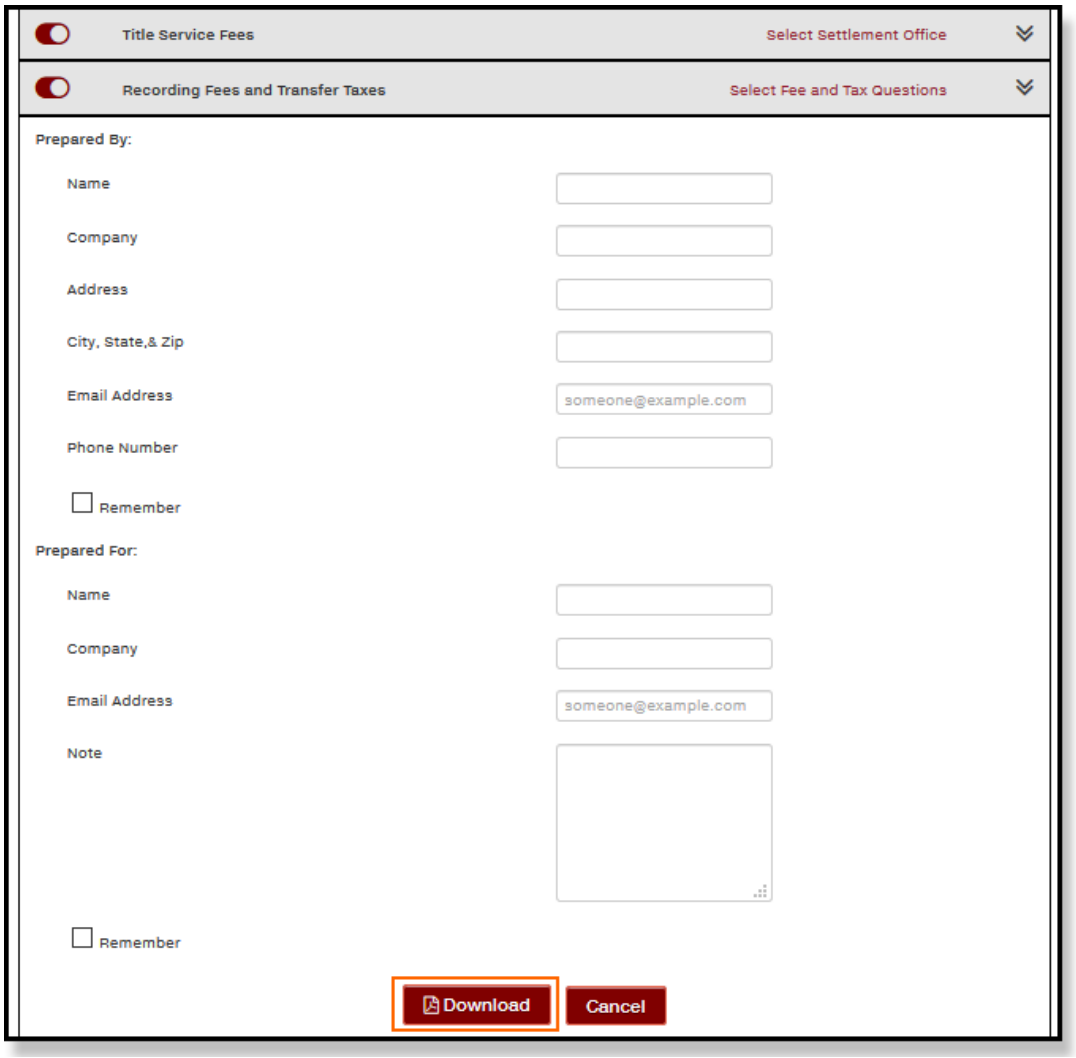


As of April 9, 2019, only **Sale/Purchase** or **Refinance** Transaction Types are available to select. Also, you do not need to enter information like **Street Address**, **Legal Description** or **Property Zip; Loan Amount** and **Sales Price** if the above highlighted fields are populated.

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**.

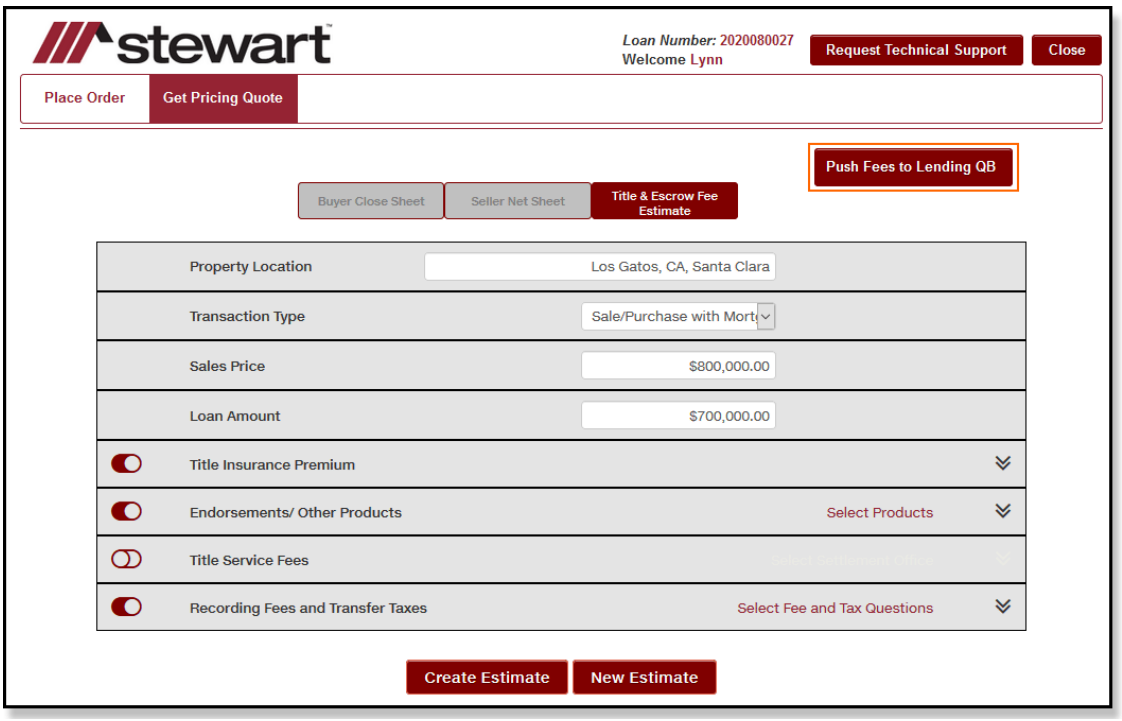


4. Once the estimates are created, click on **Download PDF** to receive a copy in your **EDocs**:

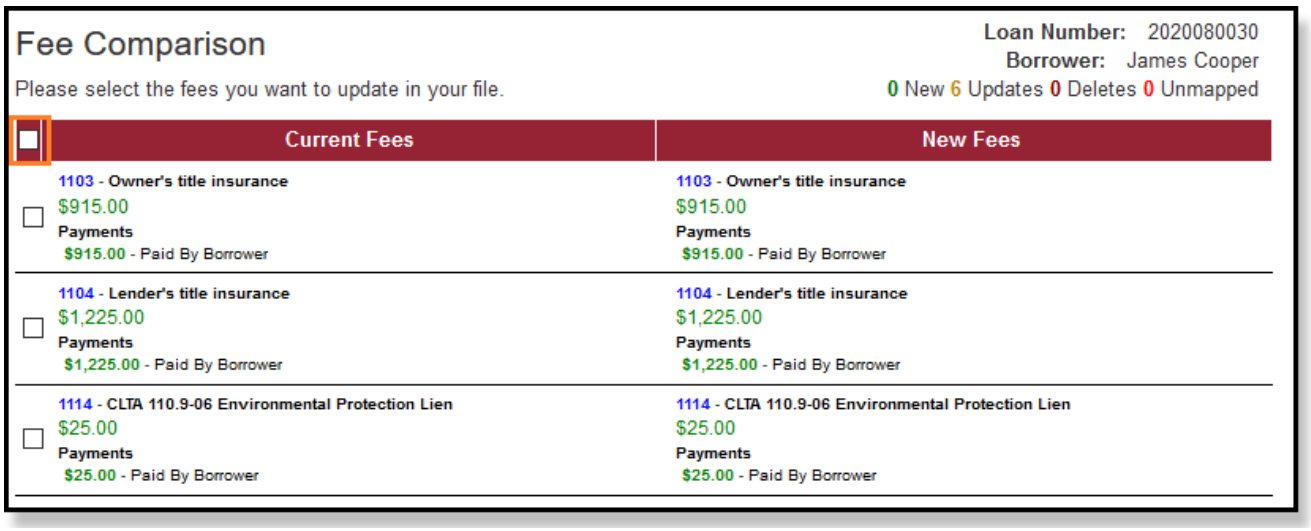


For your reference, click the **Download PDF** button to save a copy of the quotes from the *Stewart Rate Calculator* to your local machine before exiting the screen. This copy of the quotes will also be added to your **eDocs** folder in LendingQB when you import fees.

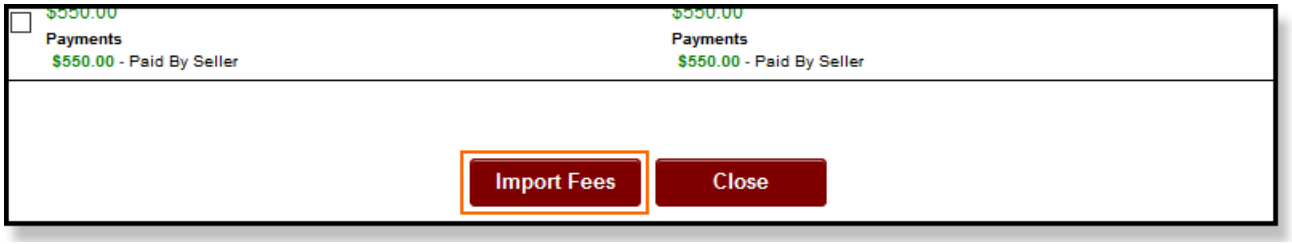
5. Click on **Push Fees to LendingQB** to import the following into LendingQB:
   - TRID Premiums
   - Endorsement Amounts
   - Title Service Fees
   - Recording Fees/Transfer Taxes



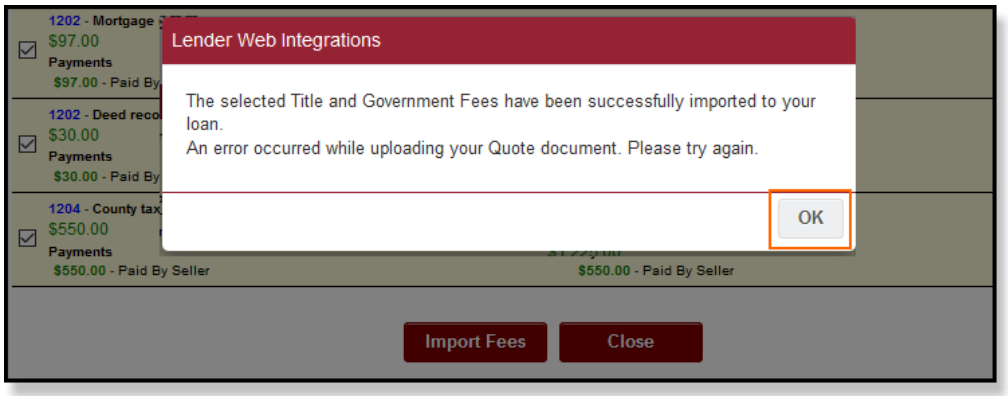
6. A pop-up window will display the **Fee Comparison** between the **Current Fees** in LendingQB and the **New Fees** (if selected) that will be imported.



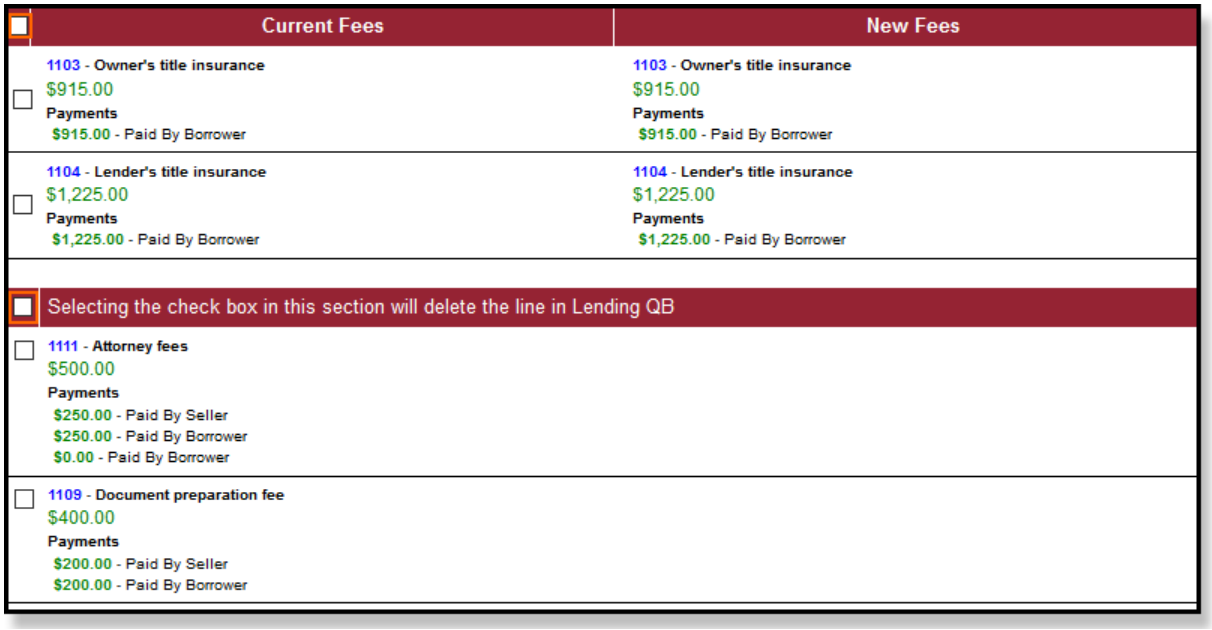
7. Check the select all checkbox or the select fees you want to import and click on **Import Fees**.



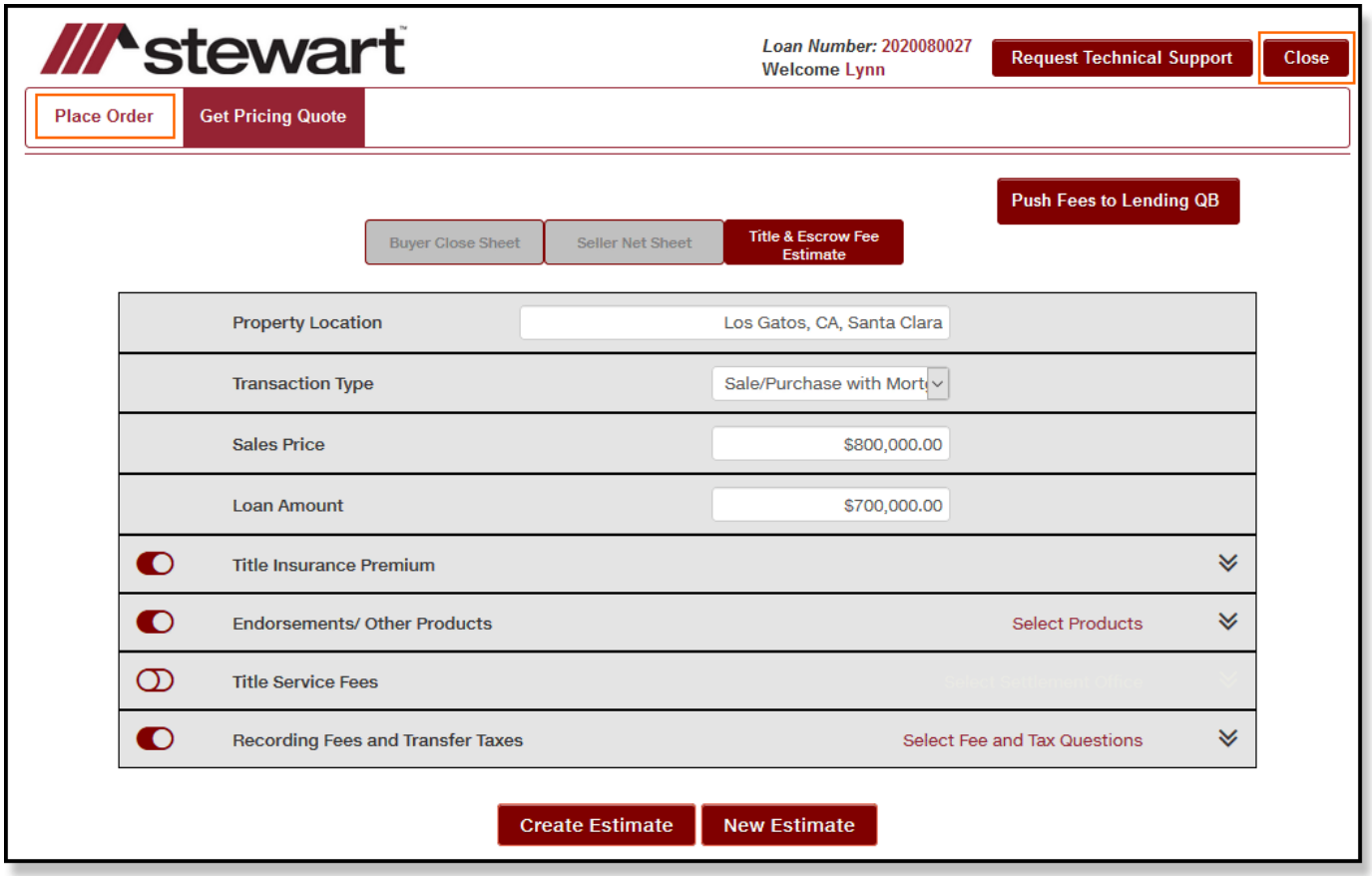
8. The **Fees** and **PDF Copy** will be imported into your LendingQB file and a pop-up will display informing you that the import was successful. Click **OK** to close this pop-up.



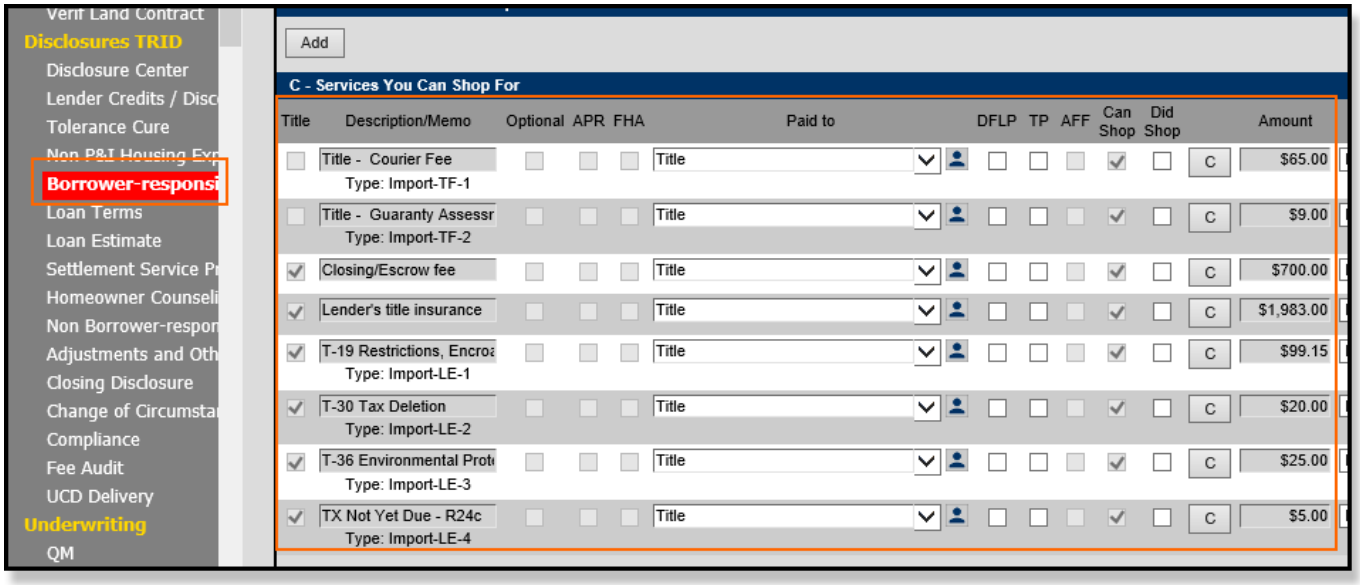
When you import for the first time, there may not be any **Current Fees** in the left column. At times, there will be instances where LendingQB will not have a matching fee to be imported. These fees are deleted in LendingQB by **checking** the **selection checkbox**, or kept if you **do not check**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



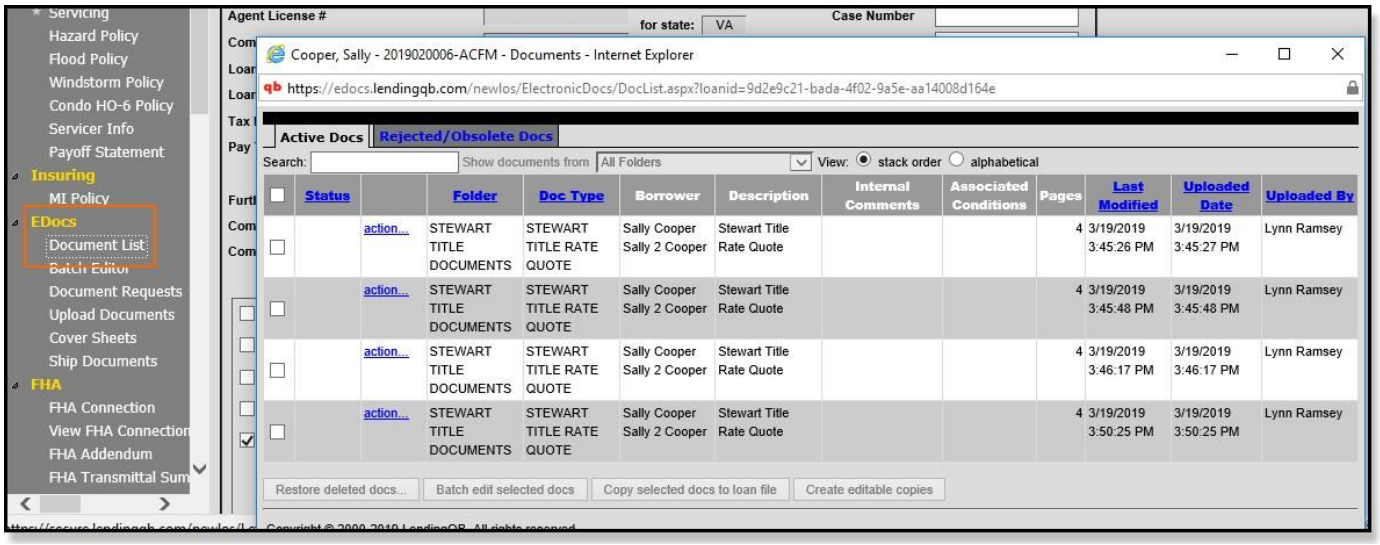
9. Select **Place Order** to place another order or **Close Application** to go back to LendingQB.



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



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



Documents

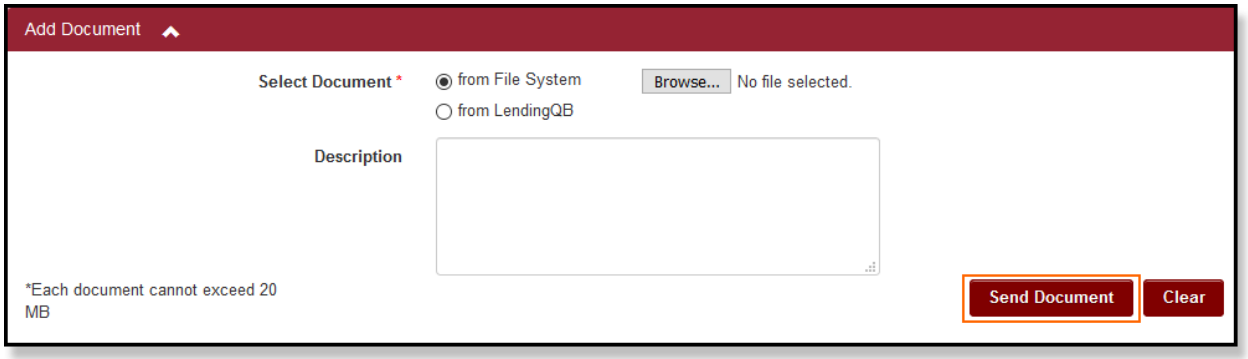
Stewart Title can send documents through the **Stewart Title Integration**. Follow these steps to do so:

Sending Documents in Place Order

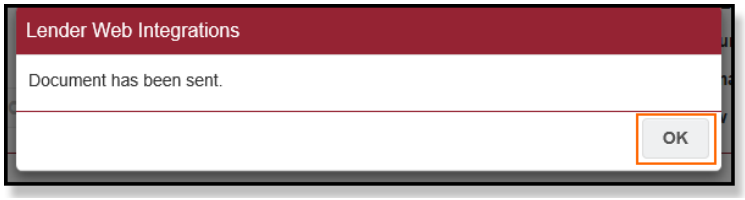
Use the steps below to send documents after an order is placed:

Steps

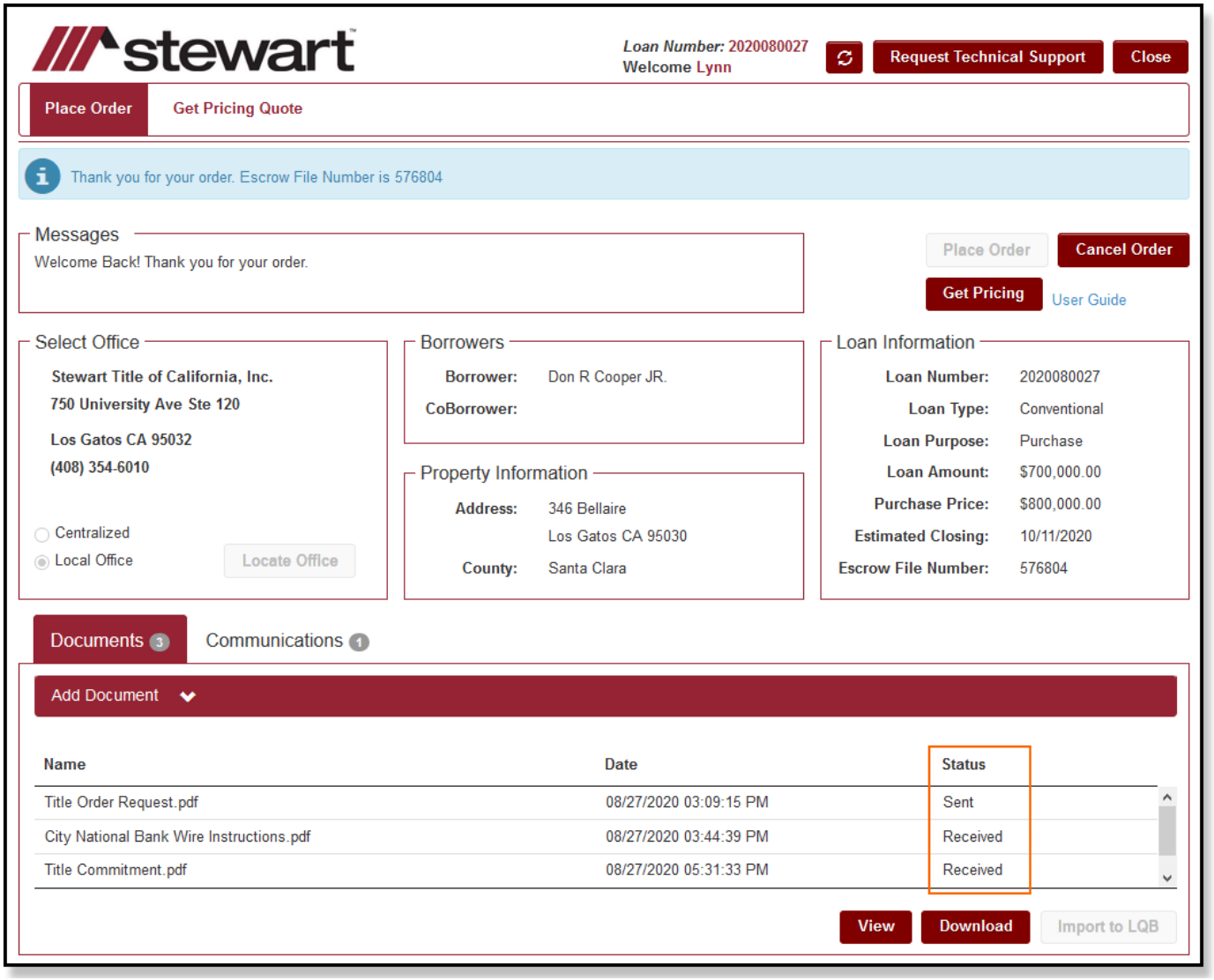
1. In *Place Order*, select the **Documents** tab.
2. From the *Documents* tab, click the Caret Symbol **^** to expand the screen. You must add a document before the order is initiated.
3. In the **Select Document** option, choose the **Document Type**.
4. In the *Description* field, insert a Description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



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

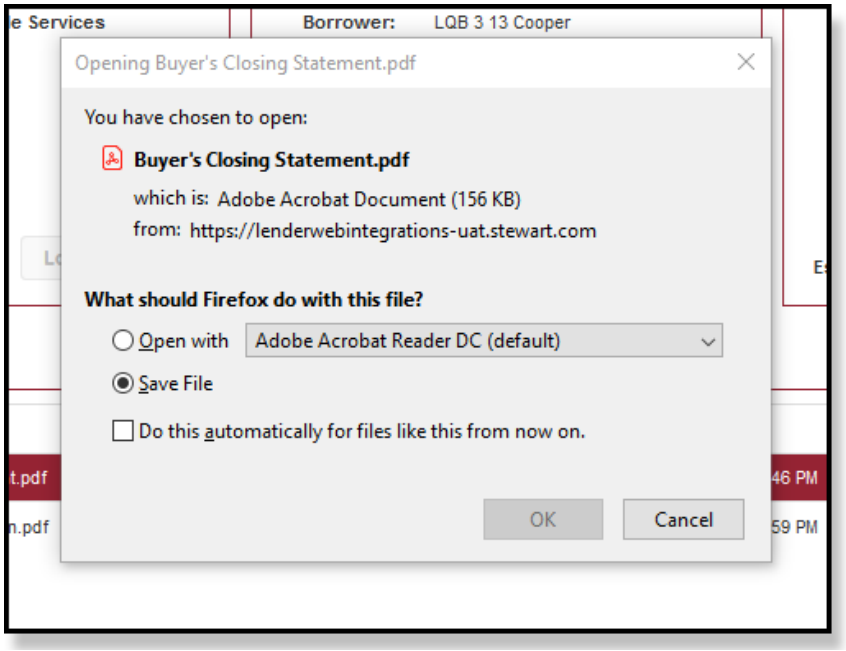


7. The Status on the Document screen will display the status of the document.



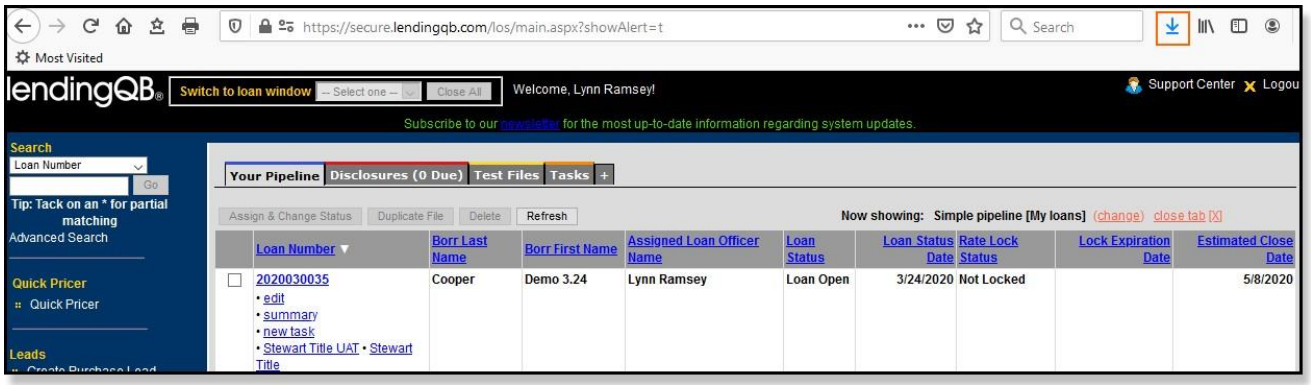
8. Here you will have three options. Click on **View** to view the document, or on **Download** to download the document to your computer. Clicking on **Import into LQB** will send it into your Loan in LendingQB.

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



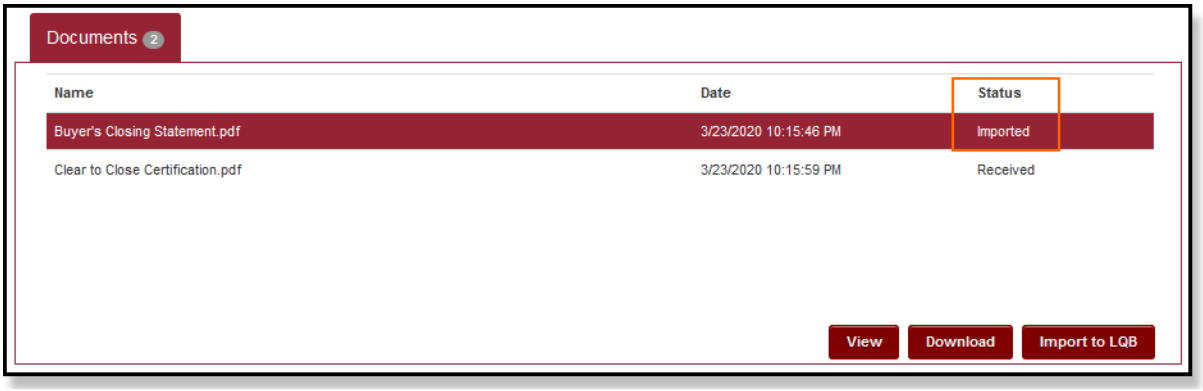
The screenshot above is taken when downloading with **Mozilla Firefox**. When using **Internet Explorer** or **Google Chrome**, you will see a different pop-up window but with the same options.

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

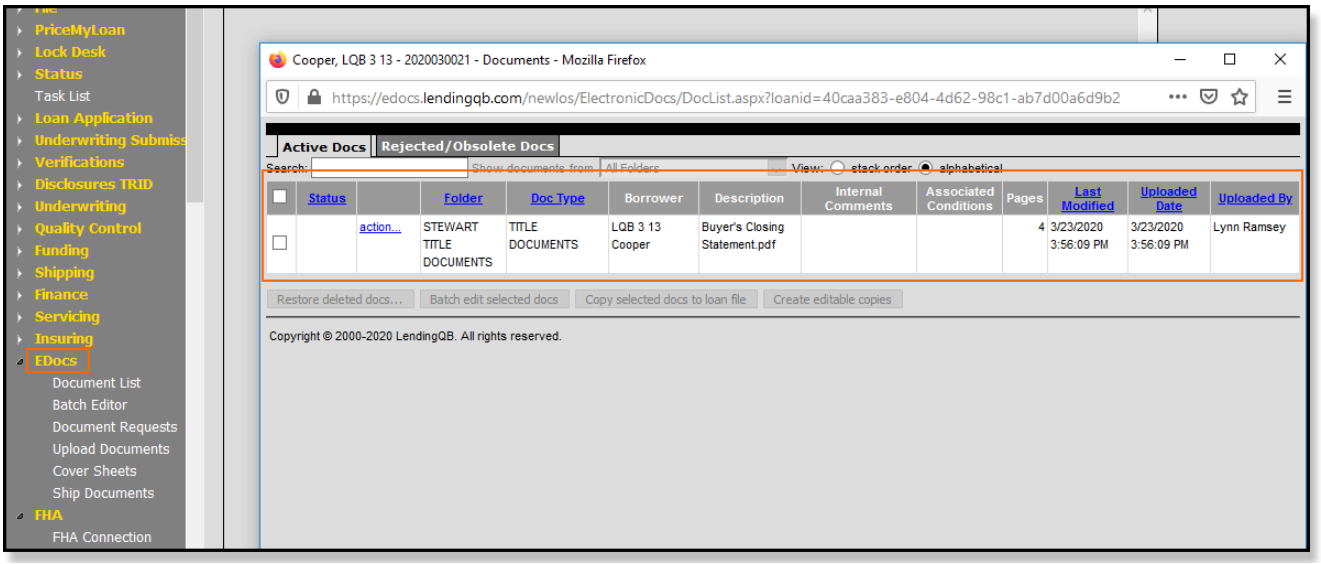


The screenshot above is taken when a document is finished downloading in **Mozilla Firefox**. When using **Internet Explorer** or **Google Chrome**, the downloaded file's notification will show up at the bottom of the screen.

11. When you click on **Import to LQB**, the **Status** of the document will change to **Imported**. You can import the documents multiple times.



12. Once imported, go back to your Loan in **LendingQB** and select **EDocs** from the menu on the left.
13. The imported document will display in **EDocs**.

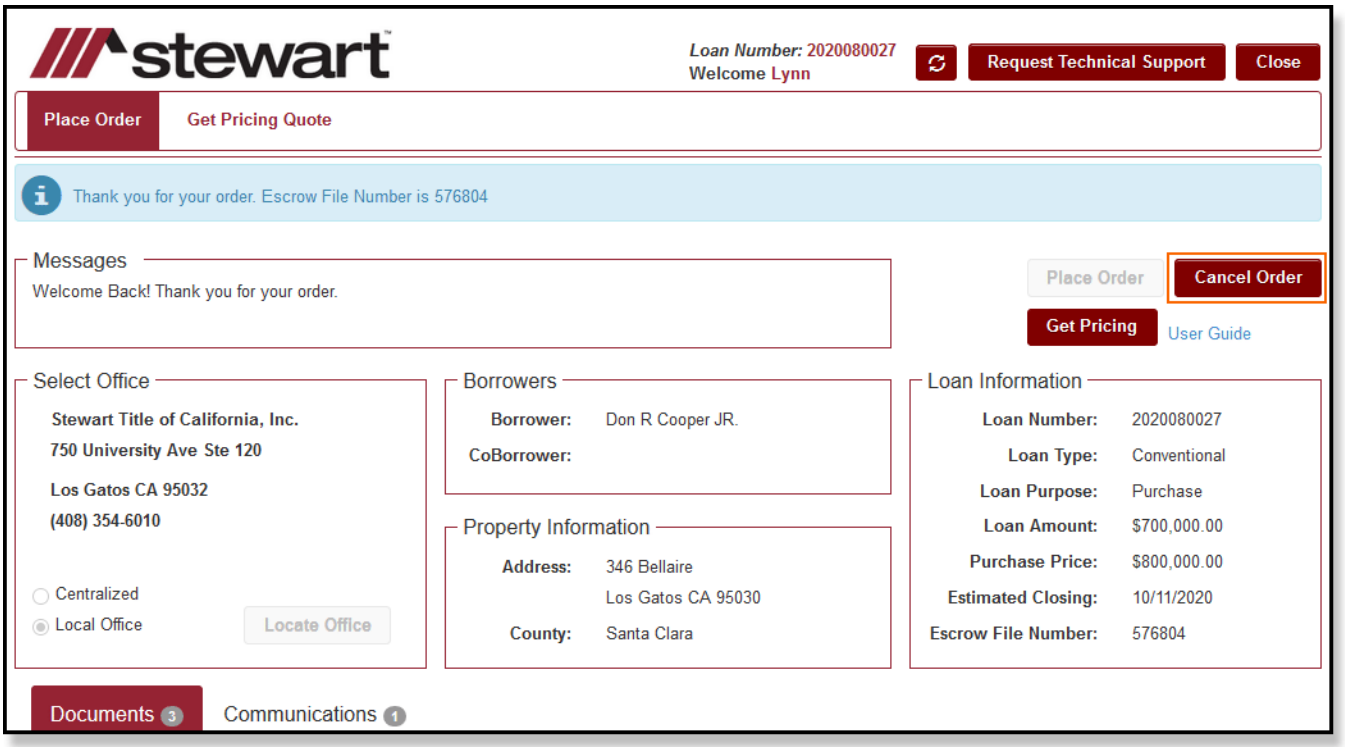


Cancel Orders

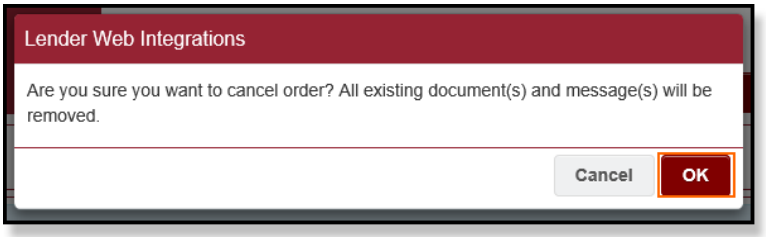
Use the steps below to cancel orders through **Stewart**:

Steps

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

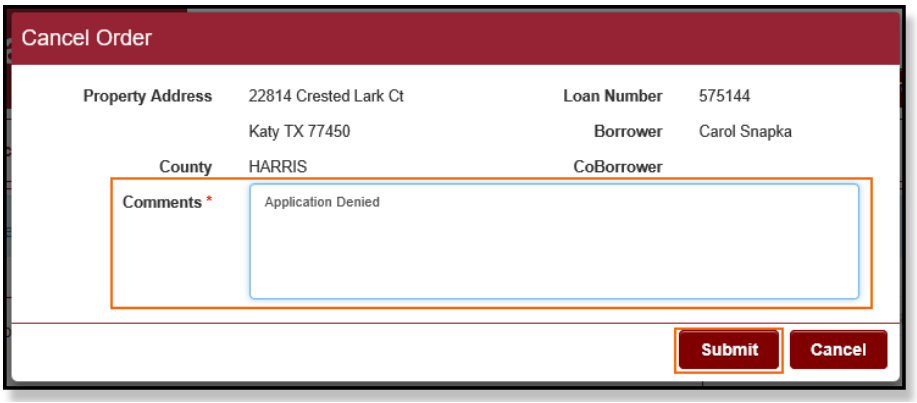


2. A pop-up message will appear which confirms if want to cancel the order. Click **OK**.

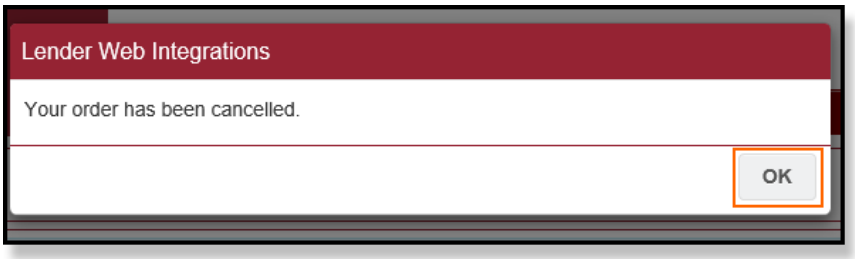


3. A **Cancel Order** window will appear.

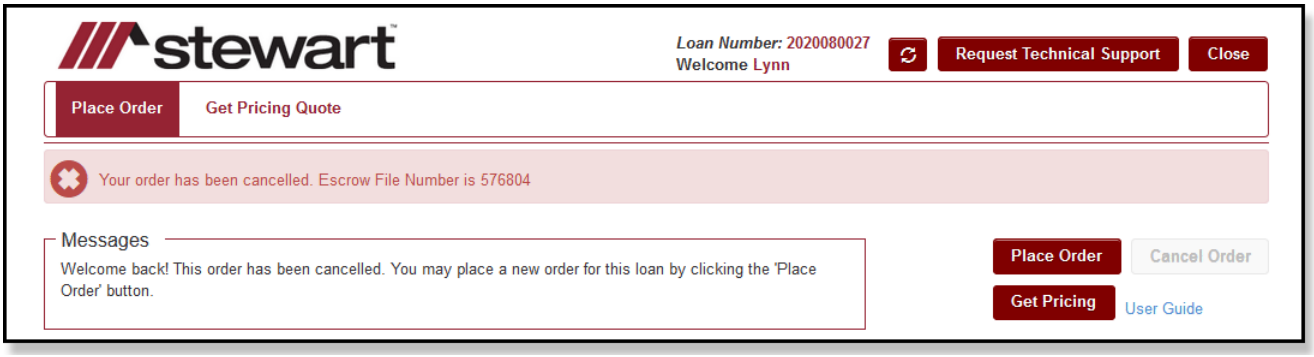
4. In the *Comments* field, enter your reason for cancellation. Click **Submit**.



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



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



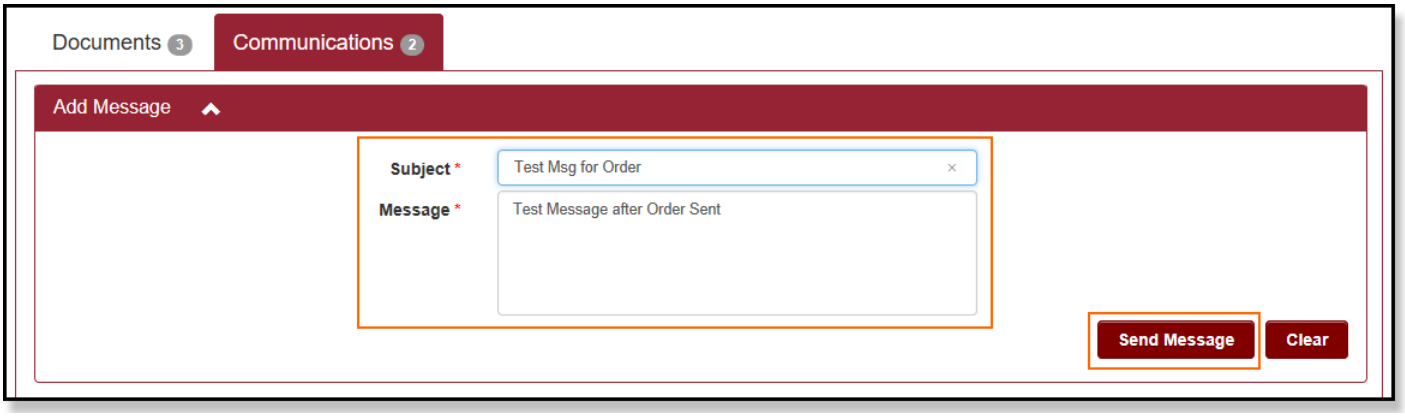
Note: Users may place an order again, if needed.

Send Messages

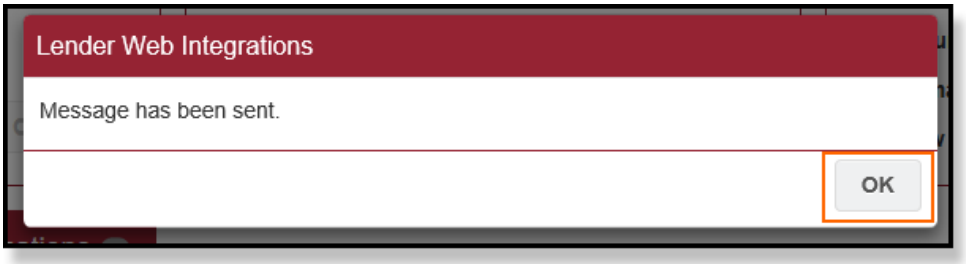
Use the steps below to send Messages after an order is placed:

Steps

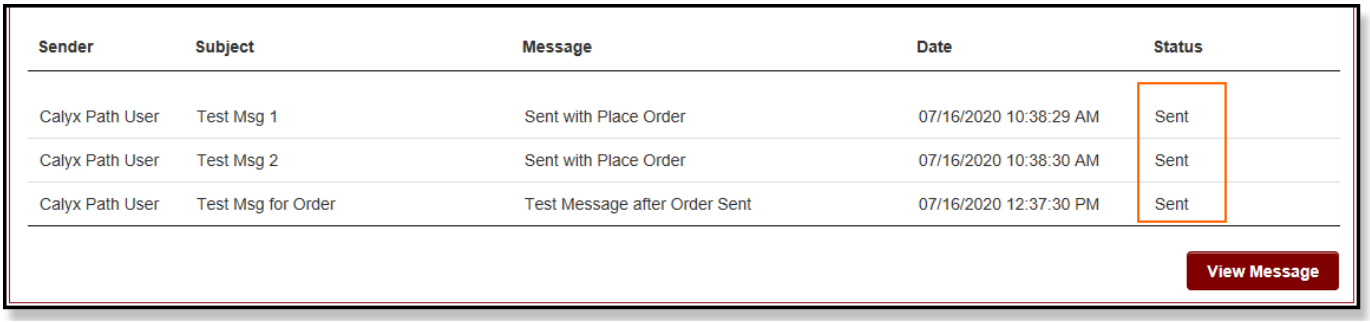
1. In the Stewart Integration, click on the **Communications** tab.
2. From the **Communications** tab, click the Carrot symbol ⮟ to expand the screen**.** You must add a document before the order is initiated.
3. In the *Subject* field, type in a subject.
4. In the *Message* field, type in a message.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



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

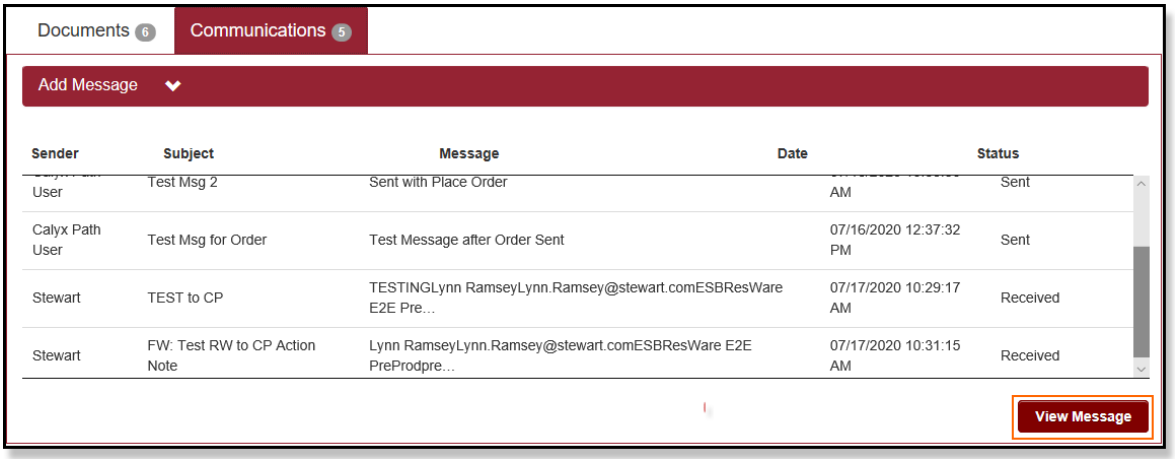
View Message

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.



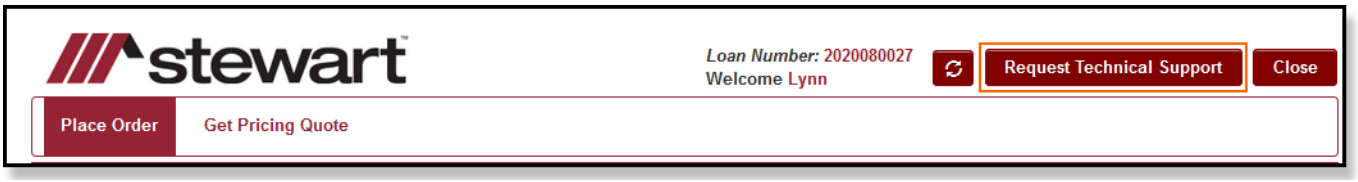
Technical or Transactional Support

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.