

MeridianLink Mortgage Integration with Stewart

User Guide

July 3, 2025



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 **MeridianLink Mortgage** to import **Fee Quotes** from **Stewart Rate Calculator** and to obtain **Title Fees Quotes**.

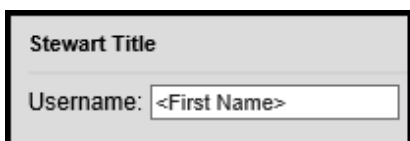
Prerequisites

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 **MeridianLink Mortgage 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@lendingqbb.com. Request access to the Stewart Title integration and include your **Stewart Unique ID** with your request.
5. **MeridianLink Mortgage** will add the **Stewart Title** integration option to your MeridianLink Mortgage 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



Stewart Title

Username: <First Name>

- To grant users API Access to Stewart Title:



Edit Employee

Employee Information | Originator Compensation | Credentials | **Services** | Roles | Relationships | Permissions | Licenses and IDs | System Access

Service Provider | Services | Account ID | Login | User Type

Add Credential

API Access

Configure API Access

Associate Vendors For API Access

<input checked="" type="checkbox"/>	Vendor
<input checked="" type="checkbox"/>	Stewart Title Company

Save Cancel

Username and Password Setup

An on-boarding process is required for lenders to be set up to use the *Stewart Title Company* interface in *MeridianLink Mortgage*. 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.

Access to Email

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>

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

Browser Compatibility

MeridianLink Mortgage 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 **MeridianLink Mortgage**:

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



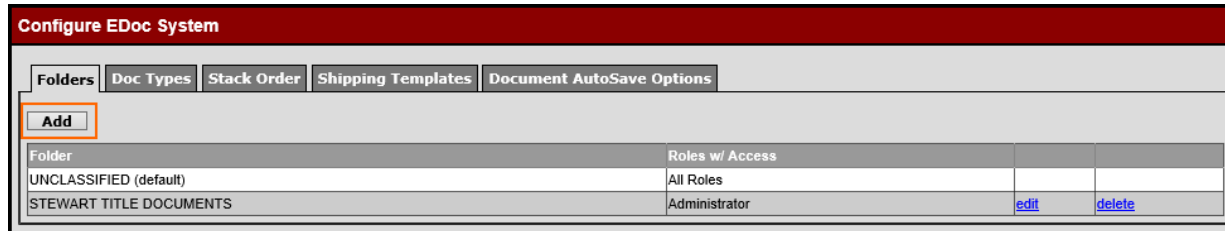
All information must be **correctly** entered in the *Description/Memo* fields or the integration will not work properly. **Predefined Title Fees** will map accordingly. If you check any checkboxes, they will not be overwritten.

Documents – Setup

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

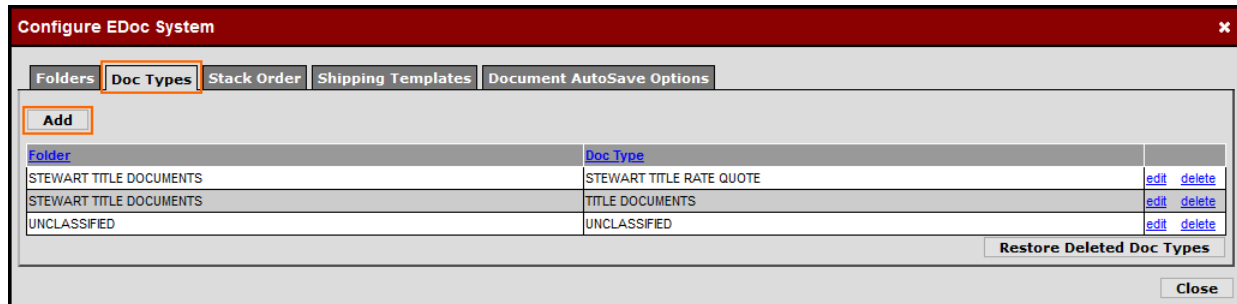
Steps

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



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

3. Select the *Doc Types* tab and click on **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 set up 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

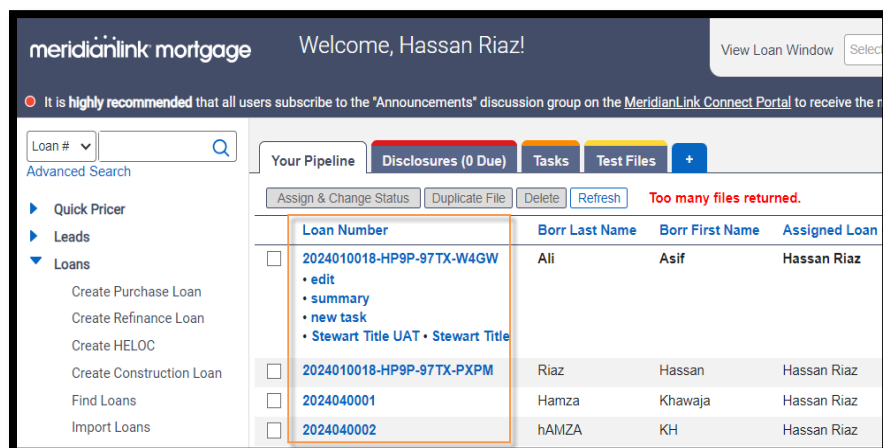
[illegible]

Launching the Interface

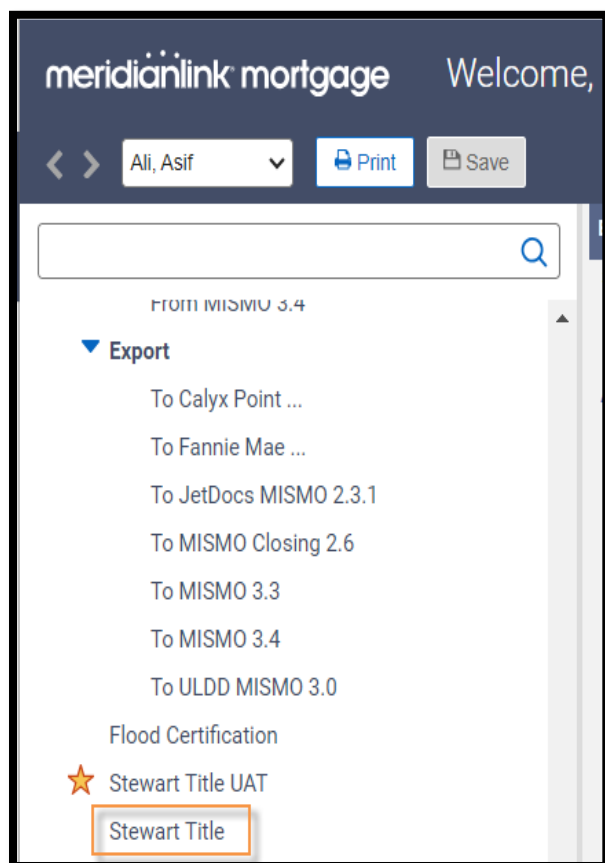
Once the integration is setup, you are ready to **Place Order** with Stewart Title or import **Fees** from **Stewart Rate Calculator** into **MeridianLink Mortgage**.

Steps

1. Log in to **MeridianLink Mortgage**.
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 **MeridianLink Mortgage**.
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 [v](#)

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.

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 MeridianLink Mortgage to enter the missing information. Then re-launch the Stewart Title page again from MeridianLink Mortgage.

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 states: 'All Borrowers must have First Name, Last Name, Email, Address, City, State and Zip'. Below this, there are sections for 'Messages', 'Select Office', 'Borrowers', 'Property Information', and 'Loan Information'. The 'Select Office' section shows 'Stewart Centralized Title Services' with address '500 North Broadway, Suite 900, St. Louis MO 63102, 844-573-5082' and radio buttons for 'Centralized' (selected) and 'Local Office'. The 'Borrowers' section shows 'Borrower: Don R Cooper JR.' and 'CoBorrower:'. The 'Property Information' section shows 'Address: 346 Bellaire, Los Gatos CA 95030' and 'County: Santa Clara'. The 'Loan Information' section shows 'Loan Number: 2020080027', 'Loan Type: Conventional', 'Loan Purpose: Purchase', 'Loan Amount: \$700,000.00', 'Purchase Price: \$800,000.00', 'Estimated Closing: 10/11/2020', and 'Escrow File Number:'. At the bottom, there are tabs for 'Documents' and 'Communications', and a table for documents with columns 'Name', 'Date', and 'Status'. The table is empty with the message 'No documents are available.' and buttons for 'View', 'Download', and 'Import to LQB'.

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 **MeridianLink Mortgage** shows *Home Equity*

The screenshot shows a form from MeridianLink Mortgage. The 'Loan Purpose' dropdown is set to 'Home Equity'. Other fields include 'Lien Position' set to '1st Mortgage', 'Loan Type' set to 'Conventional', 'Subj Prop Occ.' set to 'Primary Residence', 'Amort. Type' set to 'Fixed Rate', and 'ARM Description' is empty.

- 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 **MeridianLink Mortgage** 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 Stewart logo is on the left, and the loan number '2019080004test-4P4X' and user name 'Welcome Mianna' are on the right. Navigation buttons include 'Place Order', 'Get Pricing Quote', 'Request Technical Support', and 'Close'. Below this is a 'Messages' section with a 'Please place order.' message. The main content area is divided into three columns: 'Select Office' on the left, 'Borrowers' and 'Property Information' in the middle, and 'Loan Information' on the right. The 'Select Office' column lists 'Stewart Centralized Title Services' and 'Stewart Title Guaranty Company' with a 'Locate Office' button. The 'Borrowers' column shows 'Borrower: Betty Borrower' and 'CoBorrower:'. The 'Property Information' column shows 'Address: 1700 West 82nd Street, Suite 100, Minneapolis MN 55431' and 'County: Hennepin'. The 'Loan Information' column shows 'Loan Number: 2019080004test-4P4X', 'Loan Type: Reverse' (highlighted with a red box), 'Loan Purpose: Refinance Cashout', 'Loan Amount: \$125,000.00', 'Purchase Price: \$0.00', 'Estimated Closing: 08/14/2022', and 'Escrow File Number:'. Below the main content area are 'Documents' and 'Communications' tabs. The 'Documents' tab shows an 'Add Document' button and a table with columns 'Name', 'Date', and 'Status'. The table is currently empty, with a message 'No documents are available.' at the bottom. At the very bottom, there are 'View', 'Download', and 'Import to LQB' buttons.

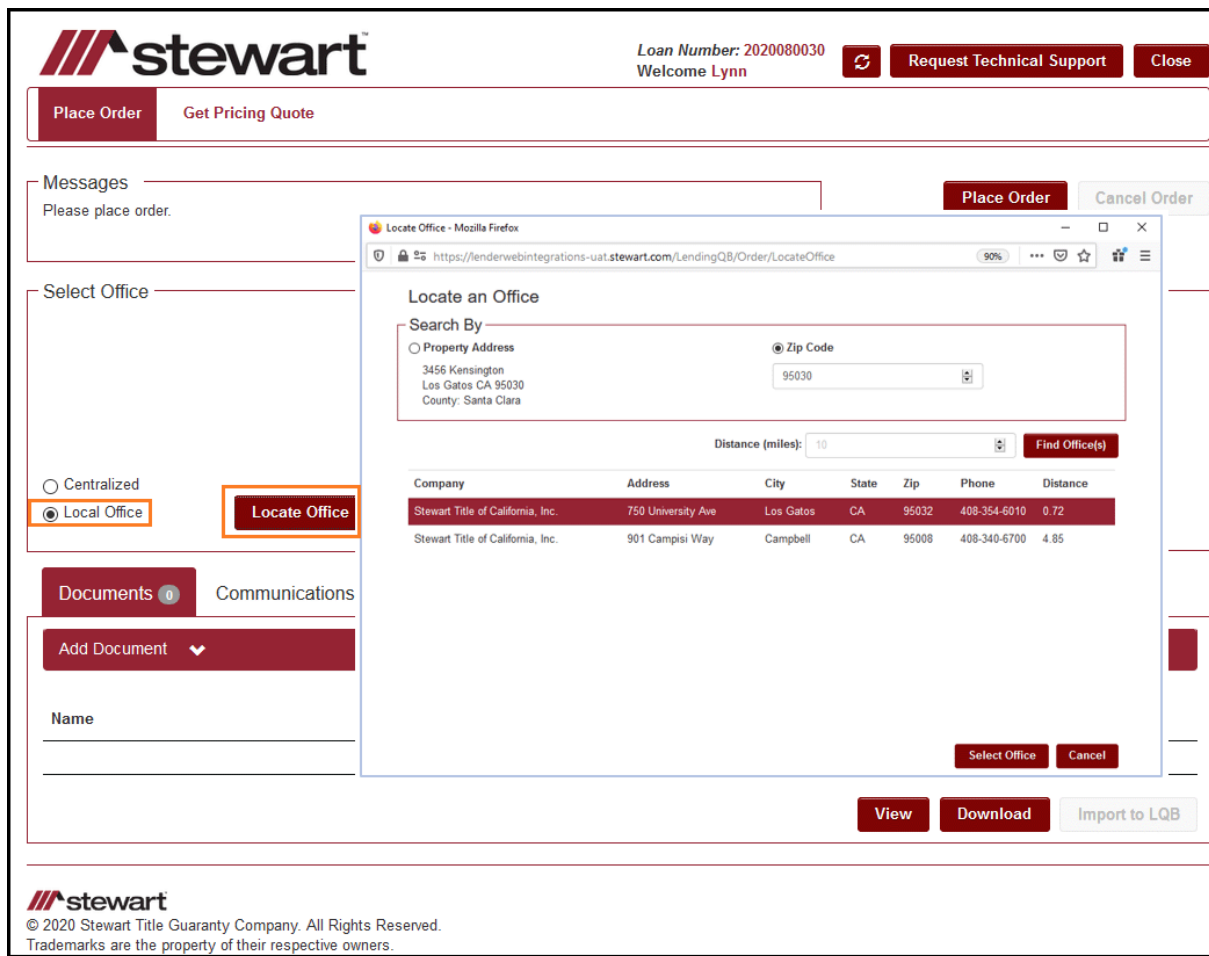
Finding an Office

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)**.



stewart Loan Number: 2020080030 Welcome Lynn Request Technical Support Close

Place Order Get Pricing Quote

Messages Please place order.

Place Order Cancel Order

Select Office

Centralized Local Office **Locate Office**

Documents Communications

Add Document

Name

Locate an Office

Search By

Property Address Zip Code

3456 Kensington Los Gatos CA 95030 County: Santa Clara 95030

Distance (miles): 10 Find Office(s)

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

Select Office Cancel

View Download Import to LQB

stewart

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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**

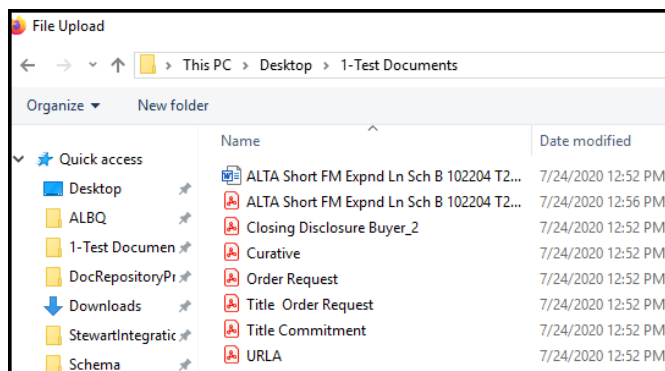
5. When an office is selected, its name and details will show up within the **Select Office** section. You may change this any time before placing the order.

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 No file selected.

Description

*Each document cannot exceed 20 MB

Name	Date	Status
No documents are available.		

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.

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**.

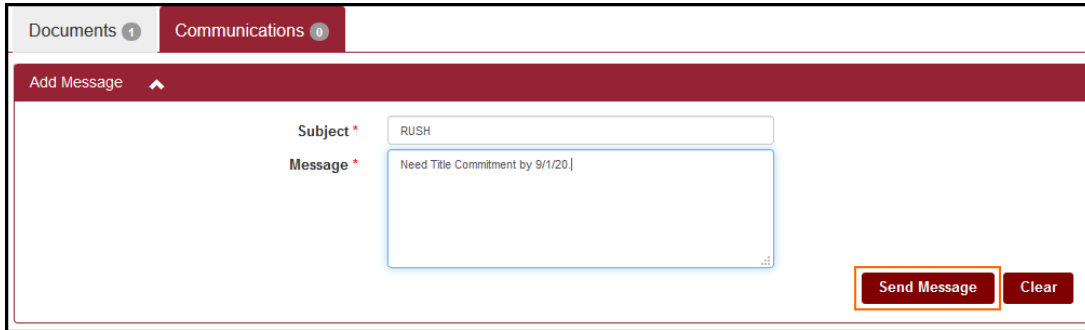
Name	Date	Status
Title Order Request.pdf	08/27/2020 02:58:58 PM	Pending (Place Order)

Send Messages with Place Order

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

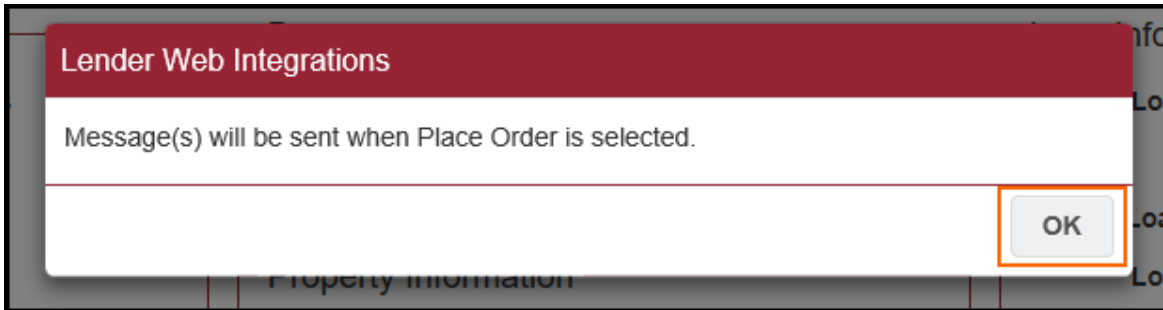
Steps

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**.



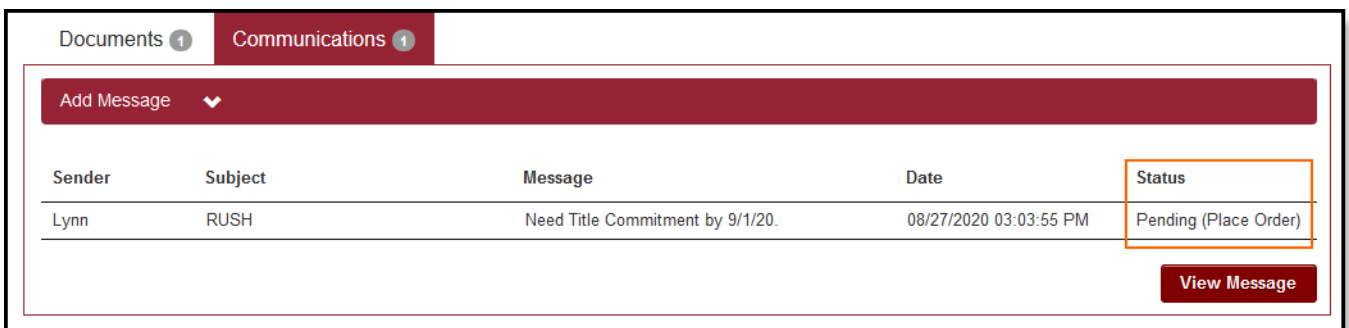
The screenshot shows the 'Add Message' form in the 'Communications' tab. The 'Subject' field contains 'RUSH' and the 'Message' field contains 'Need Title Commitment by 9/1/20.'. The 'Send Message' button is highlighted with an orange border.

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 titled '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)'. The 'View Message' button is highlighted with an orange border.

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 the 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 MeridianLink Mortgage. The Stewart Office selected on your order will be added to your loan and will be displayed in **Agents** under **Status**.

meridianlink mortgage Welcome, Mianna Tapio! Ready Assist Main Window MeridianLink Support Portal MeridianLink Connect Portal Knowledge Base Close

< > Cooper, Brian Print Save

Loan Officer	Loan Num	Status	Rate Lock Status	Top	Bottom	LTV	CLTV	HCLTV	Rate	Loan Type	Total Loan Amt
Mianna Tapio	22301250006	Loan Open	Not Locked	N/A	N/A	0.000	0.000	0.000	0.000%	Conventional	\$175,000.00

INTERNAL ASSIGNMENT

Roles		
Loan Officer	Tapio, Mianna (assign)	Loan Officer Assistant Tapio, Mianna (assign)
Processor	Tapio, Mianna (assign)	Junior Processor (assign)
Underwriter	(assign)	Junior Underwriter (assign)
Doc Drawer	(assign)	Collateral Agent (assign)
Lock Desk	(assign)	Disclosure Desk (assign)
Credit Auditor	(assign)	Legal Auditor (assign)
Secondary	(assign)	Shipper (assign)
Insuring	(assign)	Post-Closer (assign)
Manager	(assign)	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) (assign)

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"/>	Loan Opener	Mianna Tapio	Stewart Title Branch	(952) 562-6256	mtapio@stewart.com	No	No	edit
<input type="checkbox"/>	Processor	Mianna Tapio	Stewart Title Branch	(952) 562-6256	mtapio@stewart.com	No	No	edit
<input type="checkbox"/>	Loan Officer Assistant	Mianna Tapio	Stewart Title Branch	(952) 562-6256	mtapio@stewart.com	No	No	edit
<input type="checkbox"/>	Loan Officer	Mianna Tapio	Stewart Title Branch	(952) 562-6256	mtapio@stewart.com	No	No	edit
<input type="checkbox"/>	Title		Stewart Title Company	(713) 528-5007		No	No	edit
<input type="checkbox"/>	Escrow		Stewart Title Company	(713) 528-5007		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: Phone: (940) 323-1500

Contact Name: Fax:

Company Name: Stewart Title Company Cell phone:

Branch Name: Pager:

Department Name:

Company Address: 3111 Unicorn Lake Blvd Ste 130 Employee ID:

Denton TX 76210 Company ID: Stewart

Company County: Company Phone: (940) 323-1500 Company Fax:

Email: [send email](#)

☐ Send email when loan status changes

☐ Override agent and company licenses

Agent License #: for state: OK Case Number:

Company License #: CHUMS ID:

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: 159606

☐ 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?](#)

11. The **Escrow File Number** will appear in the Settlement Agent field on your Closing Disclosure.

meridianlink mortgage

Welcome, Mianna Tapio!

Ready AssistMain WindowMeridianLink Support PortalMeridianLink Connect PortalKnowledge BaseClose

<>Tapio, MiannaPrintSave

Loan Officer	Loan Num	Status	Rate Lock Status	Top	Bottom	LTV	CLTV	HCLTV	Rate	Loan Type	Total Loan Amt
Mianna Tapio	TEMPLATEMT-PNMC	Loan Open	Not Locked	N/A	N/A	100.000	100.000	100.000	0.000%	Conventional	\$300,000.00

Search

Favorites

General

Borr. Info

Borrower-responsible Closing Costs

Document List

This Loan Info

Settlement Service Provider List

Loan Estimate

Status Events

Stewart Title UAT

Closing Disclosure

Record Closing Disclosure data to archiveLast Disclosed Closing Disclosure archive: None

Closing Date

☐ 3/9/2024

Per-diem Interest Start Date

☐ 3/11/2024

Disbursement Date

☐ 3/11/2024

Settlement File#

NSWPUR24619565

Sale Price

\$300,000.00

Property

999 DEMO AVE

MinneapolisMN55441

Applicants

Mianna Tapio

999 DEMO AVE

Minneapolis, MN 55442

Sellers

Loan Term / Due (months)

360 / 360

Amortization Type

Fixed Rate

TRID Loan Purpose

Purchase

Loan Type

Conventional

Loan ID#

TEMPLATEMT-PNMC

MI Certificate ID

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 MeridianLink Mortgage.

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


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 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	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 MeridianLink Mortgage when you import fees.

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

The screenshot shows the Stewart Title website interface. At the top, the logo is on the left, and the loan number '2020080027' and user name 'Welcome Lynn' are on the right. 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 tabs 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 MeridianLink Mortgage and the **New Fees** (if selected) that will be imported.

The screenshot shows a 'Fee Comparison' pop-up window. At the top, the loan number '2020080030' and borrower name 'James Cooper' are displayed. Below this, a status bar shows '0 New 6 Updates 0 Deletes 0 Unmapped'. The main table compares 'Current Fees' and 'New Fees'. Each row includes a checkbox, a fee description, and the fee amount. The 'Current Fees' column shows fees for Owner's title insurance (\$915.00), Lender's title insurance (\$1,225.00), and CLTA 110.9-06 Environmental Protection Lien (\$25.00). The 'New Fees' column shows the same fees for the same descriptions.

	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

- 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: 10px 20px;">Close</div> </div>			

- The **Fees** and **PDF Copy** will be imported into your MeridianLink Mortgage 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
<input checked="" type="checkbox"/>	1202 - Deed reco \$30.00 Payments \$30.00 - Paid By
<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

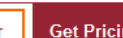


When you import for the first time, there may not be any **Current Fees** in the left column. At times, there will be instances where MeridianLink Mortgage will not have a matching fee to be imported. These fees are deleted in MeridianLink Mortgage by **checking** the **selection checkbox** or kept if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

<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 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	

selection checkbox.

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



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

10. In MeridianLink Mortgage, 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 sidebar menu with categories: Servicing, Insuring, EDocs, and FHA. The 'EDocs' category is expanded, and 'Document List' is highlighted. The main window shows a document list for loan 2019020006-ACFM. The list includes columns for 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 descriptions related to 'Stewart Title Rate Quote'. The interface also includes search bars, view options (stack order, alphabetical), and action buttons at the bottom.

Status	Folder	Doc Type	Borrower	Description	Internal Comments	Associated Conditions	Pages	Last Modified	Uploaded Date	Uploaded By
action...	STEWART TITLE DOCUMENTS	STEWART TITLE RATE QUOTE	Sally Cooper	Stewart Title Rate Quote			4	3/19/2019 3:45:26 PM	3/19/2019 3:45:27 PM	Lynn Ramsey
action...	STEWART TITLE DOCUMENTS	STEWART TITLE RATE QUOTE	Sally 2 Cooper	Stewart Title Rate Quote			4	3/19/2019 3:45:48 PM	3/19/2019 3:45:48 PM	Lynn Ramsey
action...	STEWART TITLE DOCUMENTS	STEWART TITLE RATE QUOTE	Sally Cooper	Stewart Title Rate Quote			4	3/19/2019 3:46:17 PM	3/19/2019 3:46:17 PM	Lynn Ramsey
action...	STEWART TITLE DOCUMENTS	STEWART TITLE RATE QUOTE	Sally 2 Cooper	Stewart Title Rate Quote			4	3/19/2019 3:50:25 PM	3/19/2019 3:50:25 PM	Lynn Ramsey

Documents

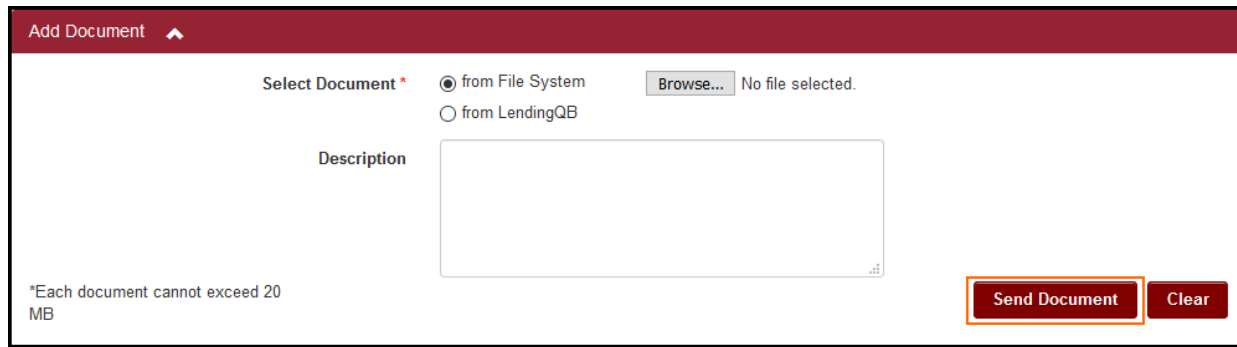
Stewart Title can send documents through the **Stewart Title Integration**. Follow these steps to do so:

Sending Documents in Place Order

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

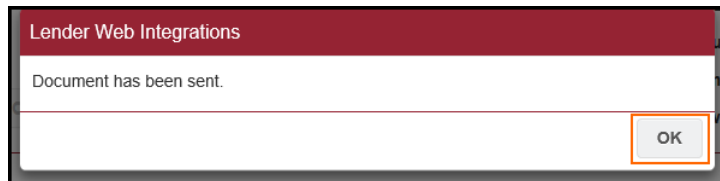
Steps

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. It contains a "Select Document" section with two radio buttons: "from File System" (selected) and "from LendingQB". Next to the "from File System" option is a "Browse..." button and the text "No file selected.". Below this is a "Description" label and a large text input field. At the bottom left, there is a note: "*Each document cannot exceed 20 MB". At the bottom right, there are two buttons: "Send Document" and "Clear".

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



The screenshot shows a pop-up message box titled "Lender Web Integrations". It contains the text "Document has been sent." and an "OK" button at the bottom right.

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

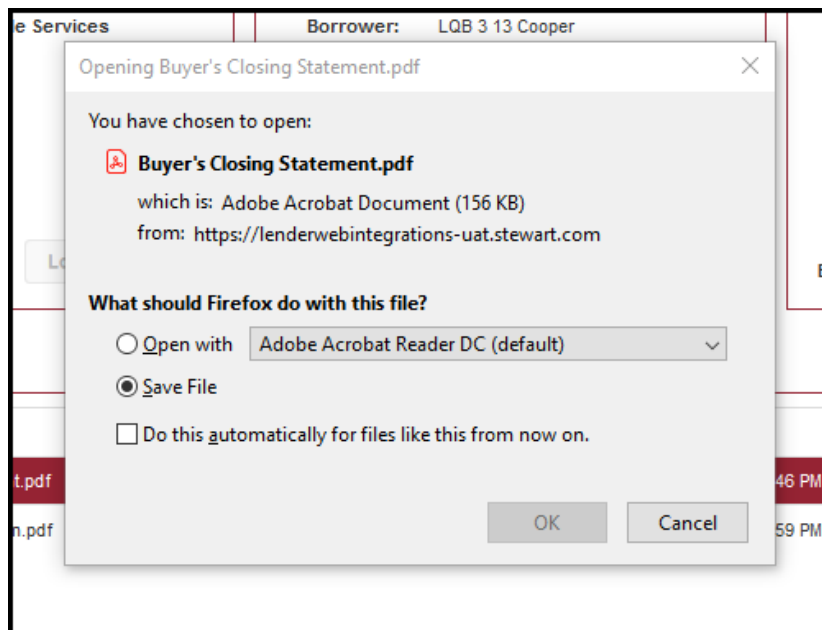
View

Download

Import to LQB

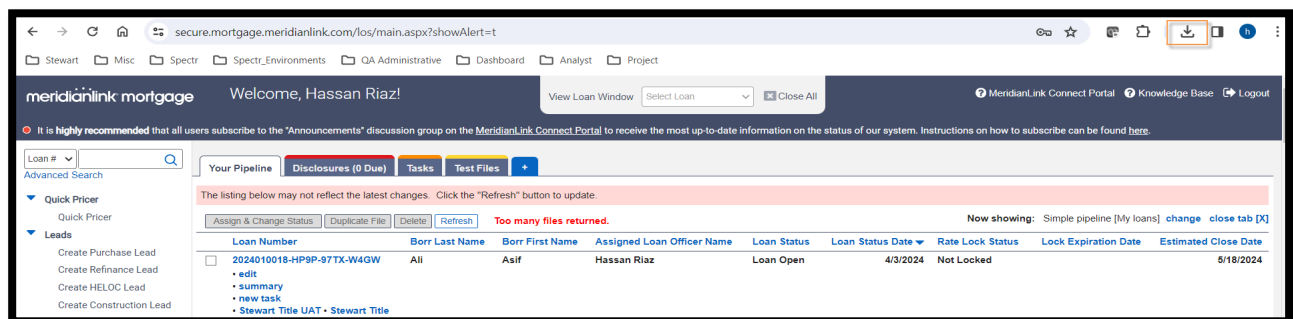
8. Here you will have three options. Click on **View** to view the document, or on **Download** to download the document to your computer. Clicking on **Import into LQB** will send it into your Loan in MeridianLinkMortgage.

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.

Documents 2		
Name	Date	Status
Buyer's Closing Statement.pdf	3/23/2020 10:15:46 PM	Imported
Clear to Close Certification.pdf	3/23/2020 10:15:59 PM	Received

View Download Import to LQB

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

The screenshot shows the MeridianLink Mortgage web application. The left sidebar contains a navigation menu with options like Windstorm Policy, Condo HO-6 Policy, Other Insurance 1 Policy, Other Insurance 2 Policy, Servicer Info, Payoff Statement, Insuring, MI Policy, **EDocs** (highlighted), Document List, Batch Editor, Upload Documents, Cover Sheets, Ship Documents, FHA, FHA Connection, View FHA Connection Results, FHA Addendum, and FHA Transmittal Summary.

The main content area displays a table of documents for loan 2024040001. The table has columns for Status, Folder, Doc Type, Borrower, Description, Internal Comments, Associated Conditions, Pages, Last Modified, Uploaded Date, and Uploaded By. Two documents are listed:

Status	Folder	Doc Type	Borrower	Description	Internal Comments	Associated Conditions	Pages	Last Modified	Uploaded Date	Uploaded By
action...	STEWART TITLE DOCUMENTS	STEWART TITLE RATE QUOTE	Khawaja Hamza	Stewart Title Rate Quote			1	4/3/2024 5:33:22 AM	4/3/2024 5:33:22 AM	Hassan Riaz
action...	STEWART TITLE DOCUMENTS	TITLE DOCUMENTS	Khawaja Hamza	Hoeck - FTBREF2475200.pdf			5	4/3/2024 5:54:21 AM	4/3/2024 5:54:21 AM	Subhash Krishnapatruni

Below the table, there are links for "Restore deleted docs", "Batch edit selected docs", "Copy selected docs to loan file", and "Create editable copies".

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 Title website interface. At the top, the Stewart logo is on the left, and the loan number '2020080027' and 'Welcome Lynn' are on the right. Below the logo, there are two tabs: 'Place Order' (active) and 'Get Pricing Quote'. A blue banner below the tabs says 'Thank you for your order. Escrow File Number is 576804'. On the right side, there are buttons for 'Place Order', 'Cancel Order' (highlighted with a red border), 'Get Pricing', and 'User Guide'. The main content area is divided into three sections: 'Select Office' (with address 'Stewart Title of California, Inc., 750 University Ave Ste 120, Los Gatos CA 95032, (408) 354-6010' and radio buttons for 'Centralized' and 'Local Office'), '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'). 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 inside says 'Are you sure you want to cancel order? All existing document(s) and message(s) will be removed.' At the bottom of the box, there are two buttons: 'Cancel' and 'OK' (highlighted with a red 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

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.

Documents6

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 RamseyLynn.Ramsey@stewart.comESBResWare E2E Pre...	07/17/2020 10:29:17 AM	Received
Stewart	FW: Test RW to CP Action Note	Lynn RamseyLynn.Ramsey@stewart.comESBResWare E2E PreProdpre...	07/17/2020 10:31:15 AM	Received

View Message

Technical or Transactional Support



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



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.

		Loan Number: 2020080027 Welcome Lynn			Request Technical Support	Close
Place Order	Get Pricing Quote					

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.