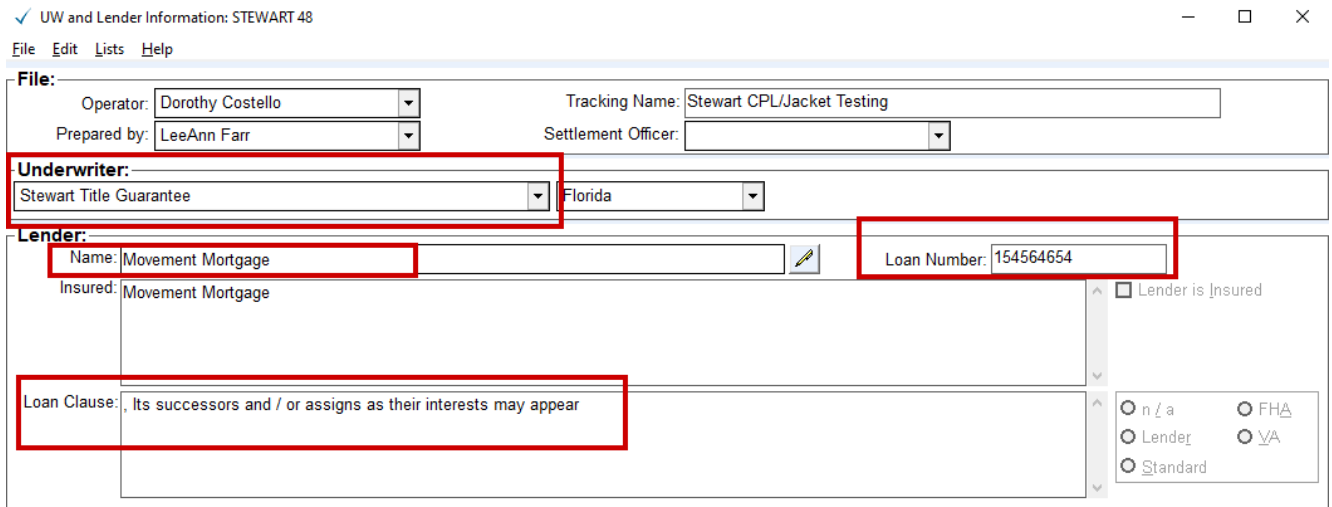# STEWART CPL USER INSTRUCTIONS

To use the integration, you need to make sure that you have Stewart Access setup. If you are **NOT** currently using it to get CPL's and Jackets you will need to contact your Stewart Title Rep and get upgraded first.

1. From the Main Screen of Closers' Choice, select the file you need to order a CPL for. Begin working through the second row of buttons on the main screen of Closers' Choice to complete your file.
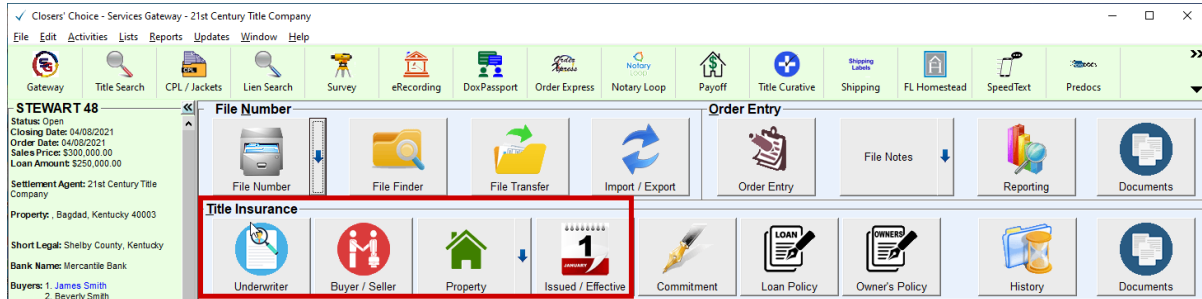
2. Make sure you have the underwriter selected as Stewart. Under the Lender section make sure you have your Lender Name, Loan Number and the lender Loan Clause is completed. In the Pencil Icon to the right of the lender name ✏ is where you can confirm your lender address. Also, in this screen you will have the ability at the bottom to enter in a different Lender Address for the CPL

Lender Information window

3. Complete your Buyer/Seller screens, as well as the Property screen.

Buyer/Seller Screen

Property Screen

4. Select the CPL/Jackets button from the Services Gateway toolbar at the top of the main screen of Closers' Choice.
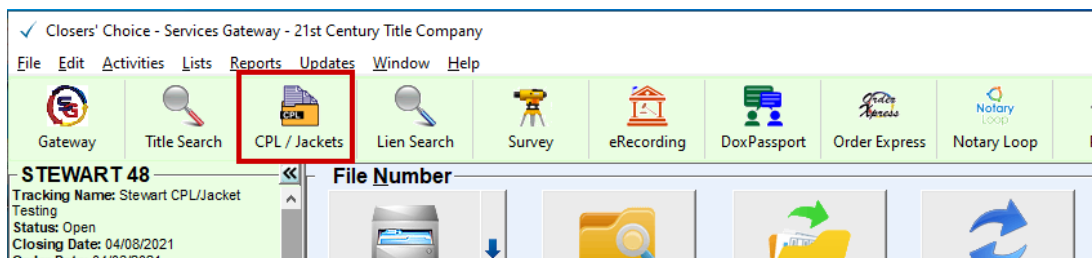
5. The CPL/Jacket window opens in your screen.

6. At the top of the screen the option for CPL is defaulted
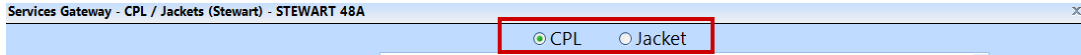
7. In the Agency, Location and Branch fields you can click the down arrow to make the appropriate selections.
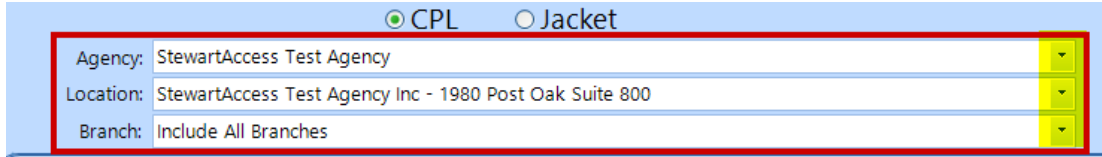
8. In the next section select your form type using the drop down arrow, then confirm your property type. If the property type in the property screen was selected as residential then residential will automatically be selected. All others will default to Commercial. Select the Covered Party for this CPL and then confirm the lender information. If you added a Lender CPL address as explained in number 2 above then when you click the Use CPL Lender Address it will populate the box with the address entered.

9. In the next section you have the ability to select either Approved Attorney, Secondary Agency or Settlement Company. Notice in the screen shot that eh settlement Company is gray. This is because in the either state where the property is located, or the Agency selected above does not have any settlement Companies assigned under it.
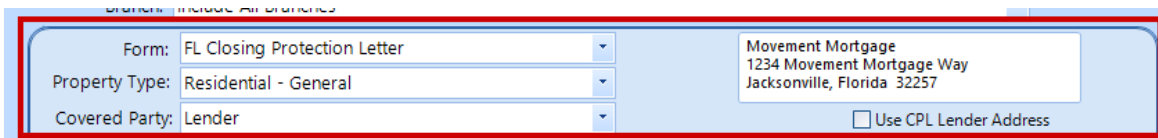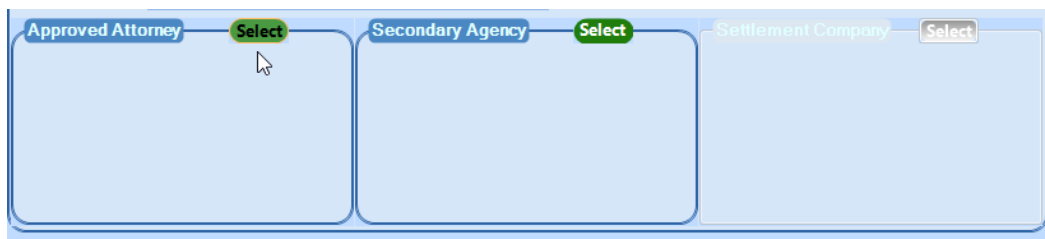

To Select one of the options in the screen shot above, click on the select button. The window opens with a search section above. If you want to enter in one or the other of the fields provided and click search it will limit the results to what was entered. Otherwise you can click the search button without entering any information and the full list of available offices will load. Click on the select button to select the office. You can also use the Favorite option on the right to designate this office as a favorite making it always appear at the top of your list when you select the Search button. To un select the office you would need to uncheck the option and the click the select button then go back to the search screen and it will remove the check option for that office.
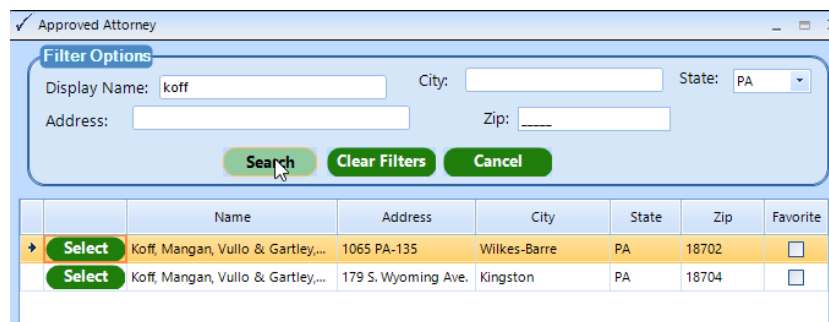
Once your office is selected the information will populate on the front screen. You have the option to clear the information or click select again to change it.

10. Once you have made all the selections click the Get CPL Button. The button will change to orange color confirming that you have clicked. The CPL will be returned and show the order placed in the Orders section and the document will automatically be saved in your file. In the Documents section you also could click view to see the results and confirm that the CPL is as requested.

11. If you need to change the CPL, you have the option to Revise. When choosing to revise a screen will load with the option that are available for revision. If the reason for the revision is not one of the options that are available, you can choose void.

On the Revision Screen you can make the necessary changes. Click Revise CPL will remove the original CPL and replace it with the new one. .

If Void is selected the window will open asking you to select a reason for the Void. Click the down arrow will allow you to select from the available reasons