

Settlor/Stewart Integration

User Guide

January 1, 2024

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Administration

Note: The below administration requires admin-level permissions in Settlor.

Credentials

Stewart requires that credentials be utilized at the individual level rather than at the company or office level. These credentials are managed in the user's *Profile* under *External Logins*. Global or company-level credentials should not be used for Stewart.

Admins can set a user's credentials through *Admin > User Directory* by selecting a user and editing the *External Logins*. Select Stewart from the dropdown and select *Add Underwriter +*, then enter the user name and password as provided by Stewart. These credentials are sent in the CPL and jacket requests to Stewart.

External Logins

Available Underwriters

(Select Underwriter)

Add Underwriter +

Underwriter

STW - Stewart

Username

user@settlor.com

Password

password!

×

Revert

Submit

Enable Policy Integrations

In *System Administration > Underwriters*, select Stewart and complete the *Integration*, *Integration Credential*, and *Integration Confirmation* fields as provided by Sewart. Select the checkboxes for *Enable Policy Integrations* and *Enable CPL Integration*.

Note: There are separate test credentials used in non-prod environments. Only use production credentials in the production environment.

Title Integration Mappings

In *System Administration > Underwriters*, select *Manage Title Integration Mappings*.

Underwriters

New

Show 10 entries

Filter:

ID	Name	Abbreviation	Expiration Date	Manage Title Integration Mappings
4	Old Republic	ORT		Manage Title Integration Mappings
5	Stewart	STW		Manage Title Integration Mappings

Showing 11 to 12 of 12 entries

Previous

1

2

Next

Product Mapping

Under *Product Master*, select *+New* to add a new mapping between a Settlor *Product Master* ID and the corresponding *Integration Code* from Stewart. The state needs to be entered first before options will come up under the *Integration Code* section.

Product Master Mapping

Underwriter ID:

STW - Stewart

State:

CO - Colorado

Product Master:

AL6 - "ALTA" Loan Policy

Integration Code:

✓ (None Selected)

ALTA Loan Policy 7-1-21

ALTA Expanded Coverage Residential LP-Current Assessments 04-02-15

ALTA Limited Pre-Foreclosure Policy 12-3-2012

ALTA Loan Policy 6-17-2006

ALTA Loan Policy 6-17-2006 No Prefix

Close

Save Changes

Endorsement Mapping

Under *Endorsement Master*, select **+New** to add a new mapping between a Settlor *Endorsement Code* and the corresponding *Integration Code* from Stewart.

Endorsement Mapping ✕

Underwriter ID:
STW - Stewart

State:
CO - Colorado

Endorsement Code:
ALTA 10.1 - Endorsement ALTA 10.1 (Assignment and Date Down)

Integration Code:
ALTA 10.1 Assignment and Date Down 7-1-21

Close

Save Changes

The list of available endorsements in Settlor can be managed in *Title Rates > Endorsement Master*.

Agent and Location ID

The agent and location IDs can be managed at the office level or at the company level. The office level takes precedence over the company-level configuration. A company that has an office or set of offices with a different agent or location ID would have IDs set at the company level and different IDs configured for those offices. If all of the offices within a company have the same IDs, they only need to be configured at the company level.

Office Configuration

In *System Administration > Offices > Underwriter Fields* section, add in Stewart as the underwriter and specify the corresponding agent and location ID.

Note: this is used if a closing office is on the order.

Underwriter Fields

Underwriter	Agent ID	Location ID/Name	
STW - Stewart	StewartAccess Test Agency	StewartAccess Test Agency - 10333 Richr	<div>+New Row ✕</div>

Company Configuration

In *System Administration > Underwriters*, select the row for Stewart and configure *Company Details* with the corresponding *Agent ID* and *Location ID*. The credentials should be left blank and instead set at the individual user level.

Note: not having a *location ID/name* will cause an error if there is no closing office on an order or if the office on the order does not have these configurations in place.

Company Details

Company	State	Agent Id	Location ID/Name	Credential	
STL - Settlor	(None Selected)	StewartAccess Tes	StewartAccess Tes	Stewart New Integration	✖
SFT - Security 1st Title	(None Selected)	StewartAccess Tes	StewartAccess Tes	Stewart New Integration	✖
CO700 - RGB, Inc., DBA Land Title Guara	(None Selected)	StewartAccess Tes	StewartAccess Tes	Stewart New Integration	✖

Appending Stewart’s Jacket to Policy

To utilize the jacket returned from Stewart as part of the policy, create a new policy document config that excludes the policy jacket (so starting at Schedule A). Then, in *System Admin > Commitment/Policy Document Configuration*, in the *Policy Document Information* section, click to edit the document and point the document record to the new policy document and check the *Use Underwriter Jacket* checkbox.

Policy Document Information

Document Id:

40 - ALTA Owner's Policy

☒ Use the Underwriter Jacket?

Remittance Report Format

A CSV format will need to be specified for the Underwriter Remittance Report generation by selecting *Stewart* in *System Admin > Underwriters > Stewart > Remittance Report Type*.

☐ Requests Policy

☐ Is International

Address:

1221 Stewart Cir

Overlimit Underwriter:

(None Selected)

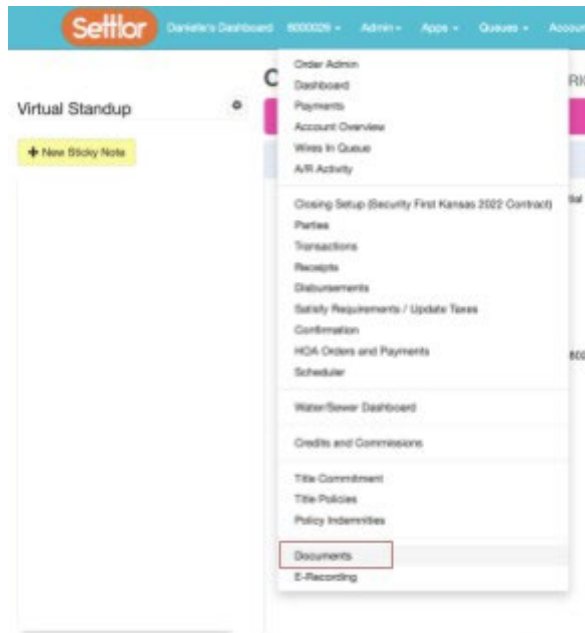
Remittance Report Type:

Stewart

Closing Protection Letter (CPL)

Request a CPL

To generate the closing protection letter document, click the order number dropdown in the top navigation menu and select *Documents*.



In the top menu of the *Documents* page, select *Closing Protection Letter*. This opens the *CPL Request* form.

Documents 123 MAIN STREET, DENVER, CO 80203 (RU350943TLA)

[+ Add Document\(s\)](#) ☒ [Upload a Document](#) [Pretype](#) [Closing Protection Letter](#) [Deliver Selected](#) [Print Selected](#)

[ESignature](#) [RON](#) [Cover Sheets](#) [Document Options](#) [Delete](#) [Publish](#) [Add to Package](#)

[View Deleted Documents](#)

☐ Documents

☐ Order Sheet [↑](#)

☐ [Order Sheet](#) [🔗](#) created Today (09/21) by System [🔔](#) [+ Add Comments](#)

Sort from Document is (170, 999, 0)

The *CPL Request* form displays information pulled in from the order and defaults field values based on the *CPL Type* selected. Note: the *CPL Type* field is not submitted to Stewart. If available, the address will pull in from *Party > Deliveries*. These fields are editable, and edits will not save back to the order.

CPL Request

CPL Type:

Seller

Loan number:

The loan number to use for the CPL

Covered Parties

Covered Person

Sally Seller (Seller/Owner)

Alternate Name

If applicable

+ New Row

+ New Row

Underwriter CPL ID:

The unique ID given to this CPL by the underwriter (if applicable)

Addressee:

Sally Seller (Seller/Owner)

Underwriter CPL Form:

CO SELLER (Seller/Owner)

Addressee Alternate Name:

Attention:

The attention line to use during delivery.

☐ Is International

Address:

123 Seller Address Road

Address 2:

Apartment, suite, unit, building, floor, etc... If entering a foreign address, use multiple lines in this field.

Zip:

80203

City:

Denver

State:

CO - Colorado

[Close](#)[Save Changes](#)

Select *Save Changes* to submit the CPL request. If the CPL request is successful, the document is available in the order in the *Documents > Processing Documents* section.

Note: The document title is configurable in the *Documents* administration. Click

the document hyperlink to preview the CPL.

Documents 123 MAIN STREET, DENVER, CO 80203 (RU350943TLA)

+ Add Document(s)

✓

Upload a Document

Pretype

Closing Protection Letter

Deliver Selected

Print Selected

ESignature

RON

Cover Sheets

Document Options

Delete

Publish

Add to Package

[View Deleted Documents](#)

☐ Documents

☐ Processing Documents

☐ Insured Closing Letters

uploaded Today (09/21) by Danielle Bonneau

Sort from Document Type is (120, 999, 0)

+ Add Comments

Void a CPL

A CPL can be voided by either editing the existing CPL or by deleting the document.

Edit and Replace CPL

Select the edit (pencil) icon next to the CPL and modify the data in the form. Once changes are saved, the previous CPL is voided and moved to deleted documents, and the *Documents* list updates to display the new CPL. The *Cancel Reason* for the replaced CPL is auto-selected by the system.

Documents 123 MAIN STREET, DENVER, CO 80203 (RU350944TLA)

+ Add Document(s)

✓

Upload a Document

✎ Pretype

🛡 Closing Protection Letter

✉ Deliver Selected

🖨 Print Selected

ESignature

RON

📄 Cover Sheets

⚙ Document Options

✕ Delete






🔄 Publish

Add to Package ▾

[View Deleted Documents](#)

☐ Documents

☐ Processing Documents

☐ [Insured Closing Letters](#)   uploaded Today (09/21) by Danielle Bonneau    + Add Comments

Sort from Document Type is (120, 999, 0)

Deleting CPL Document

A CPL can be voided by either selecting the multi-select box next to the document and clicking *Delete* in the top bar or by editing the existing CPL and selecting the *Cancel Reason*, *Confirm Cancel*, and *Delete*.

CPL Request

CPL Type:
Seller

Loan number:
The loan number to use for the CPL

Covered Parties

Covered Person

Alternate Name

+ New Row

Sally Seller (Seller/Owner)

If applicable

+ New Row

Underwriter CPL ID:
960850446

Cancel Reason:
Coverage Declined

☒ Confirm Cancel

Addressee:
Sally Seller (Seller/Owner)

Underwriter CPL Form:
CO SELLER (Seller/Owner)

Addressee Alternate Name:

Attention:
The attention line to use during delivery.

☐ Is International

Address:
123 Seller Address Road

Address 2:
Apartment, suite, unit, building, floor, etc... If entering a foreign address, use multiple lines in this field.

Zip:
80203

City:
Denver

State:
CO - Colorado

Delete

Close

Save Changes

Policy Jacket

Request a Policy Jacket

Before a policy jacket can be requested, *Title Setup* (if enabled) and a commitment must first be completed.

In the order number dropdown, select *Title Policies* and scroll to the applicable policy. Select *Request Jacket*.

Policy Dashboard 444 Main Street, DENVER, CO 80232 (RU350961)

Place Order HoldCancel OrderEnable Overlimit\$ Invoice ProductsEdit Policy Exceptions+ New Owners Product+ New Loan Product

First "ALTA" Owner's Policy (STW - Stewart)

ExceptionsRequest JacketDeliverCreate New CommitmentPreview PolicyCopy ProductCopy from BackgroundPlace Hold

Distribution

Betty Buyer (Buyer/Borrower - Primary) - Proposed Insured

Buyer/Borrower
Betty Buyer
123 Main Street
Denver, CO 80203
Via: Electronic Mail
Blind Copy

Bob Buyer (Buyer/Borrower) - Proposed Insured

Buyer/Borrower
Bob Buyer
123 Main Street
Denver, CO 80203
Via: Electronic Mail
Blind Copy

Note: A *Policy Date* must be entered in the Schedule A section of the product in order to request a policy jacket. When complete, click *Submit* to request the policy jacket.

If the policy jacket is successfully created, the Stewart policy number will display in the header of the policy. Select *Preview Policy* to review the jacket and the appended policy from the Settlor system.

Policy Dashboard 444 Main Street, DENVER, CO 80232 (RU350961)

[Place Order Hold](#) [Cancel Order](#) [Enable Overlimit](#) [\\$ Invoice Products](#) [Edit Policy Exceptions](#) [+ New Owners Product](#) [+ New Loan Product](#)

First "ALTA" Owner's Policy O-9301-005256438 (STW - Stewart)

[Exceptions](#) [Cancel Jacket](#) [✉ Deliver](#) [Create New Commitment](#) [Preview Policy](#) [Copy Product](#) [Copy from Background](#) [Place Hold](#)

Distribution

Betty Buyer (Buyer/Borrower - Primary) - Proposed Insured [✎](#) [+ New Delivery](#)

Buyer/Borrower [✎](#)

Betty Buyer
123 Main Street
Denver, CO 80203
Via: Electronic Mail
Blind Copy

Bob Buyer (Buyer/Borrower) - Proposed Insured [✎](#) [+ New Delivery](#)

Buyer/Borrower [✎](#)

Bob Buyer
123 Main Street
Denver, CO 80203
Via: Electronic Mail
Blind Copy

Void a Policy Jacket

In the *Title Policies* page, select *Cancel Jacket*.

Policy Dashboard 444 Main Street, DENVER, CO 80232 (RU350961)

[Place Order Hold](#) [Cancel Order](#) [Enable Overlimit](#) [\\$ Invoice Products](#) [Edit Policy Exceptions](#) [+ New Owners Product](#) [+ New Loan Product](#)

First "ALTA" Owner's Policy O-9301-005256438 (STW - Stewart)

[Exceptions](#) [Cancel Jacket](#) [✉ Deliver](#) [Create New Commitment](#) [Preview Policy](#) [Copy Product](#) [Copy from Background](#) [Place Hold](#)

Distribution

Betty Buyer (Buyer/Borrower - Primary) - Proposed Insured [✎](#) [+ New Delivery](#)

Buyer/Borrower [✎](#)

Betty Buyer
123 Main Street
Denver, CO 80203
Via: Electronic Mail
Blind Copy

Bob Buyer (Buyer/Borrower) - Proposed Insured [✎](#) [+ New Delivery](#)

Buyer/Borrower [✎](#)

Bob Buyer
123 Main Street
Denver, CO 80203
Via: Electronic Mail
Blind Copy

In the *Cancel Policy Jacket* form, select a *Cancel Reason*. When complete, click *Submit*.

Cancel Policy Jacket

Are you sure you wish to cancel the following policy?

Product: "ALTA" Owner's Policy

Insured: Betty Buyer AND Bob Buyer

Coverage: \$100,000.00

Our Policy Number: O-9301-005256438

Underwriter Policy Number: O-9301-005256438

Cancel Reason

Entered in Error

Close

Submit

Once a policy jacket for a product is canceled, a new one can be created.

Note: Settlor does not currently support revisions.

Remittance Report

To generate a remittance report of CPLs, endorsements, and policies that are invoiced, navigate to the *A/R* tab in the top navigation bar and select *Underwriter Remittance Reporting*. The table on the right shows a history of previously generated reports that were created by selecting *Send Report*. Previous reports can be downloaded in a Quickbooks format or CSV.

To generate a new report, select the company, underwriter, and the date range. Select *Download CSV* to preview the new items including will include all unremitted policies, endorsements, and CPLs that will be remitted with *Send Report* is selected.

Send Report will:

- 1. Identify all unremitted policies, endorsements, and CPLs that have been invoiced or voided within the specified parameters (the same dataset as *Download CSV*)
- 2. Mark them all as remitted and produce a new remittance history row on the right table.
- 3. Download the report in the format specified in the underwriter admin.

Note: currently, the report does not automatically send to the underwriter.

If a policy is subsequently voided, it will appear in the next remittance report.

Underwriter Remittance Reporting

Company

CO700 - RGB, Inc., DBA Land Title Guarantee Company

Underwriter

STW - Stewart (8/11/2023)

Start Date:

09/01/2023

End Date:

Enter the ending date to re

Reporting 9/1/2023 through today for Stewart

Download CSV

Send Report

Start Date	End Date	Invoiced Premiums	Reported Premiums	
9/1/2023	11/15/2023	\$13,617.00	\$1,361.70	Download QuickBooks Download CSV Download Report
8/1/2023	8/11/2023	\$2,716.00	\$271.60	Download QuickBooks Download CSV Download Report