



Stewart Access Portal

Release Notes

June 10, 2016

Version 1.7

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Stewart Access 1.7 Release Notes

Stewart Access 1.7 includes additional functionality and enhancements. This document provides users with an introduction to new features and functionality implemented with this release.

Deployment Date: June 10, 2016

New in This Release

An overview of new features and modifications to Stewart Access 1.7 include:

- Agency users can now [cancel individual endorsements](#) on an **Issued Jacket** without having to cancel the entire **Jacket**.
- Users can now add a [Property to a CPL](#) without having to select a **Property Type** or **County**.
- [International addresses can now be added](#) to the **Buyer/Borrower** and **Seller** in both **CPL** and **Jackets**.
- A new [Favorites icon](#) has been added to the **Add Lender** dialog box in **File**, **CPL** and **Jackets**.

Cancelling Individual Endorsement on Issued Jackets

Agency users are now able to cancel an individual endorsement on an Issued Jacket without having to cancel the entire Jacket. In the past cancelling a Jacket would cancel all endorsements associated with the Jacket.

To cancel an individual endorsement on an Issued Jacket:

Steps

1. Go to the **Endorsements** tab on the **Issued Jacket**, then click the **Cancel** icon.

The screenshot shows the Stewart Access interface for policy 193501962, which is in an 'Issued' status. The 'Endorsements' tab is selected and highlighted with an orange box. Below the tabs, a table lists the endorsement details:

Endorsement	Liability	Actual Premium	Actual Remittance	Trans Code	Serial Number	Calculated
ALTA 17-06 Access and E...	\$500.00	\$100.00	\$50.00	505	193502031	\$0

A red 'X' icon is visible next to the first row in the table, indicating the cancellation action.

2. A second line will appear subtracting out the values for **Liability**, **Actual Premium**, and **Actual Remittance**. The **Status** will show as **Cancelled** on both lines.

The screenshot shows the Stewart Access interface after the cancellation. The 'Endorsements' tab now shows two rows, with the second row representing the cancelled endorsement. The 'Liability', 'Actual Premium', and 'Actual Remittance' columns for the second row are highlighted with an orange box, showing negative values. The 'Status' column for both rows is also highlighted with an orange box, showing 'Cancelled'.

Endorsement	Liability	Actual Premium	Actual Remittance	Trans Code	Serial Number	Calculated Remittance	Status	Cancel Date
ALTA 17-06 Access and E...	\$500.00	\$100.00	\$50.00	505	193502031	\$0	Cancelled	6/6/2016
ALTA 17-06 Access and E...	-\$500.00	-\$100.00	-\$50.00	505	193502031	\$0	Cancelled	6/6/2016

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Creating Property in CPL without Property Type and County

A **Property** record can now be added in **CPL** without the requirement of entering the **Property Type** and **County** on the **File**. These two fields are now optional when creating a **Property** record.

To add a Property record:

Steps

1. Go to the **Property** tab on the **CPL**, then click the **+** icon.

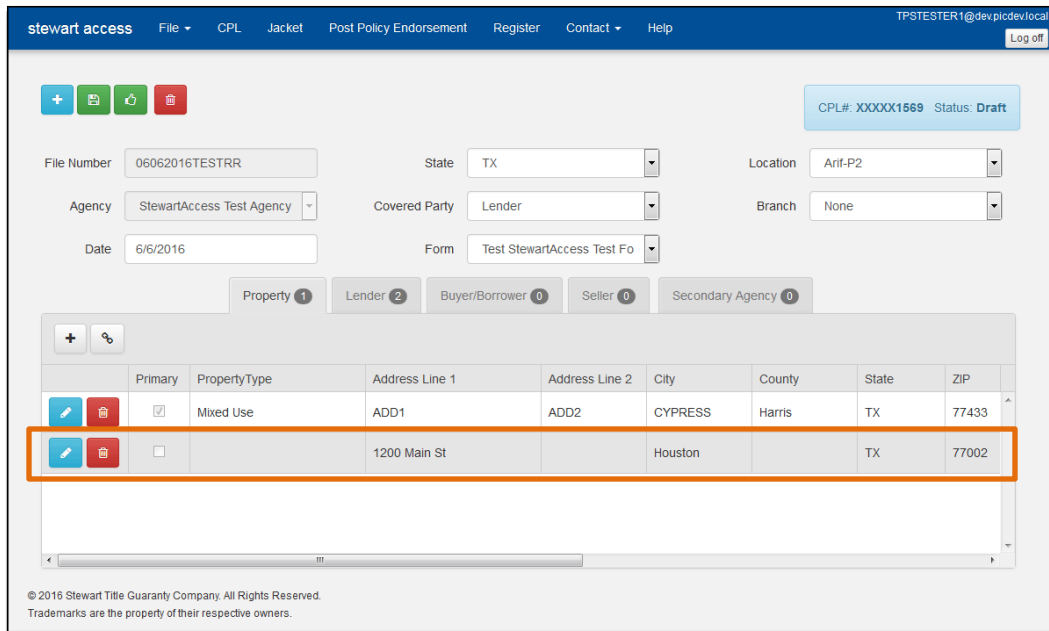
The screenshot shows the Stewart Access web application interface. At the top, there is a navigation bar with 'stewart access' and various menu items. Below the navigation bar, there are several input fields for file information: File Number (06062016TESTRR), State (TX), Location (Arif-P2), Agency (StewartAccess Test Agency), Covered Party (Lender), Branch (None), Date (6/6/2016), and Form (Test StewartAccess Test Fo). A blue box indicates 'CPL#: XXXXX1569 Status: Draft'. Below these fields, there are tabs for 'Property 1', 'Lender 2', 'Buyer/Borrower 0', 'Seller 0', and 'Secondary Agency 0'. The 'Property 1' tab is selected, and a table below it contains one property record. The table has columns for Primary, Property Type, Address Line 1, Address Line 2, City, County, State, and ZIP. The record shows 'Mixed Use' for Property Type, 'ADD1' for Address Line 1, 'ADD2' for Address Line 2, 'CYPRESS' for City, 'Harris' for County, 'TX' for State, and '77433' for ZIP. A '+' icon is highlighted in the top left of the table area.

Primary	Property Type	Address Line 1	Address Line 2	City	County	State	ZIP
<input checked="" type="checkbox"/>	Mixed Use	ADD1	ADD2	CYPRESS	Harris	TX	77433

2. Enter the property address. Both the **Property Type** drop-down and **County** fields are optional, so in this example we will leave them blank. Click **Save**.

The screenshot shows the 'Add Property' dialog box. It contains several input fields: File Number (06062016TESTRR), Agency (StewartAccess Test Agency Inc), Property Type (a blank drop-down menu), Address Line 1 (1200 Main St), Address Line 2 (a blank text box), County (a blank drop-down menu), City (Houston), State (TX), ZIP (77002), Country (USA), Lot (a blank text box), Block (a blank text box), Section (a blank text box), Subdivision (a blank text box), PIN (a blank text box), and Metes And Bounds (a blank text box). The 'Save' and 'Cancel' buttons are at the top right. The 'Property Type' and 'County' fields are highlighted with orange boxes.

- The new property will be added to the **CPL** and is listed on the **Property** tab.



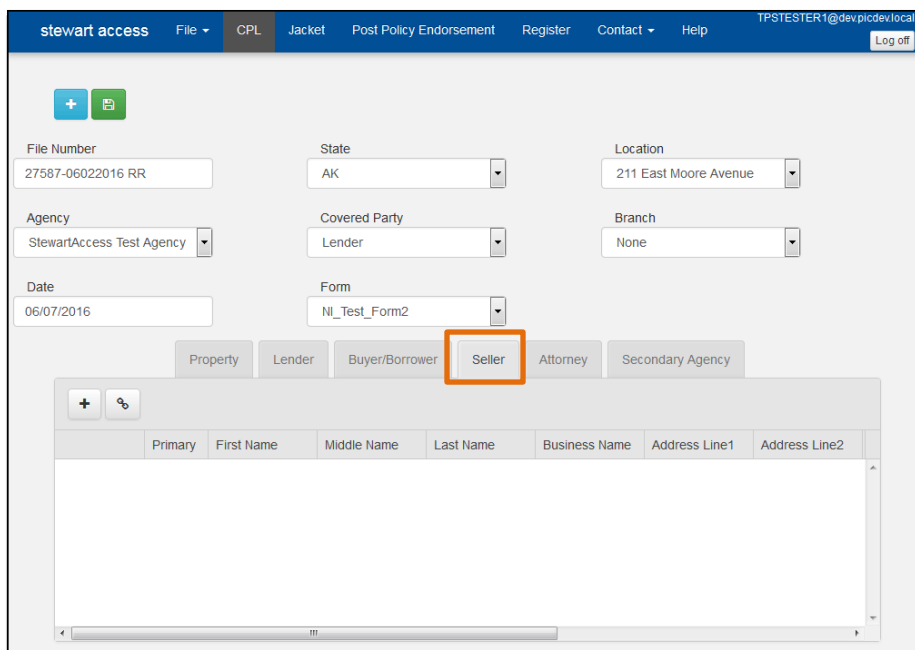
Associating International Buyer/Borrower and Seller Addresses in CPL and Jackets

Agency users now have the ability to enter international addresses for Buyer/Borrower and Seller records on the **File**, **CPL** and/or **Jacket**.

To enter an international address:

Steps

- Go to the **File**, **CPL** or **Jacket**. In this example, we will open the **CPL**.
- Select either the **Buyer/Borrower** or **Seller** tab. In this example, we will select the **Seller** tab.



3. Click the + icon to add a new **Seller**.

The screenshot shows the Stewart Access application interface. At the top, there is a navigation bar with the text "stewart access" and a "Log off" button. Below the navigation bar, there are several input fields and dropdown menus for file information: File Number (27587-06022016 RR), State (AK), Location (211 East Moore Avenue), Agency (StewartAccess Test Agency), Covered Party (Lender), Branch (None), Date (06/07/2016), and Form (NI_Test_Form2). Below these fields are tabs for "Property", "Lender", "Buyer/Borrower", "Seller", "Attorney", and "Secondary Agency". A table is displayed below the tabs, with a red box highlighting a "+" icon in the top left corner. The table has columns for "Primary", "First Name", "Middle Name", "Last Name", "Business Name", "Address Line1", and "Address Line2".

4. Select the **Is International Address** checkbox and enter the information for the **Seller**. Be sure to include the Seller's First and Last Name or Business Name and the full address. Then click **Save**.

The screenshot shows the "Add Seller" form in the Stewart Access application. At the top right, there are "Save" and "Cancel" buttons, with a red box highlighting the "Save" button. The form includes the following fields: File Number (27587-06022016 RR), Agency (StewartAccess Test Agency Inc), First Name, Middle Name, Last Name, Business Name (InfoSys), Address Line 1 (Gandhi Nagar), Address Line 2 (Plot # 12-90-8), City (Hyderabad), State (Andhra Province), ZIP (522202), and Country (INDIA). A red box highlights the "Is International Address" checkbox, which is checked.

5. The seller with an international address will be added to the **Seller** tab.

Primary	First Name	Middle Name	Last Name	Business Name	Address Line1	Address Line2
<input checked="" type="checkbox"/>				InfoSys	Gandhi Nagar	Plot # 12-90-8

Favorites Icon in CPL

A new **Favorites** icon has been added to the **Add Lender** dialog box that appears in the **File**, **CPL** and **Jacket**. This feature allows users to easily select **Approved Lenders** that they frequently associate with **Files**, **CPLs** and/or **Jackets**.

To select an **Approved Lender** that has been designated as a **Favorite**:

Steps

1. Go to the **File**, **CPL** or **Jacket**. In this example, we will open the **File**.
2. Click the drop-down in the **Lender** field.

Search: BZC 1-7 6-10 Demo StewartAccess Test Agency Inc

Property 3

Lender 2

Buyer/Borrower 2

Seller 0

- Click the + icon to add a **Lender**.

The screenshot shows the Stewart Access interface. At the top, there is a navigation bar with 'stewart access' and various menu items like 'File', 'CPL', 'Jacket', 'Post Policy Endorsement', 'Register', 'Contact', and 'Help'. The user is logged in as 'TPSTESTER1@dev.picdev.local'. Below the navigation bar, there is a search bar with 'BZC 1-7 6-10 Demo' and 'StewartAccess Test Agency Inc'. The main content area is divided into sections: 'Property' (3 items), 'Lender' (2 items), 'Buyer/Borrower' (2 items), and 'Seller' (0 items). The 'Lender' section contains a table with the following data:

Legal Name	Branch	Mailing Address	County	City	State	ZIP	Count
American Heri...	MAIN OFFICE	PO Box 580	Curry	Clovis	NM	88101-3861	USA
U.S. Bank, N.A.	SAN RAFAEL	5800 Northga...	Marin	San Rafael	CA	94903-6831	USA

A plus icon (+) is highlighted in the top left corner of the Lender section, indicating the option to add a new lender.

- Enter either the lender's **Legal Name**, **City** and **State** or enter its **ZIP** and **Country**. In this example we will enter the **ZIP** and **Country**. Then click the **Star** icon to search for the existing **Lender**.

The screenshot shows the 'Add Lender' dialog box overlaid on the Stewart Access interface. The dialog box has a title 'Add Lender' and 'Save' and 'Cancel' buttons. It contains the following fields:

- File Number:** BZC 1-7 6-10 Demo
- Agency:** StewartAccess Test Agency Inc
- Search By:** Legal Name, City, State, ZIP, Country
- ZIP:** 77433-3322
- Country:** USA
- Lender:** A dropdown menu with a star icon (★) highlighted, a magnifying glass icon (Q), and a plus icon (+). The dropdown menu is currently set to 'Please Select'.

The background shows the same Stewart Access interface as the previous screenshot, but it is dimmed to focus on the dialog box.

5. Click the drop-down arrow in the **Please Select** field and choose the **Favorite Lender**.

6. Click **Save**.

7. The **Favorite Approved Lender** will appear on in the **Lender** section of the **File**.

The screenshot shows the Stewart Access application interface. At the top, there is a navigation bar with the following items: "stewart access", "File", "CPL", "Jacket", "Post Policy Endorsement", "Register", "Contact", "Help", and a user profile "TPSTESTER1@dev.picdev.local" with a "Log off" button. Below the navigation bar is a search area with two search terms: "BZC 1-7 6-10 Demo" and "StewartAccess Test Agency Inc".

The main content area is divided into several sections:

- Property** (3 items)
- Lender** (3 items)
- Buyer/Borrower** (2 items)
- Seller** (0 items)

The **Lender** section is expanded, showing a table of lenders. The table has the following columns: Legal Name, Branch, Mailing Address, County, City, State, ZIP, and Count. The **Wells Fargo** entry is highlighted with an orange border.

Legal Name	Branch	Mailing Address	County	City	State	ZIP	Count
American Heri...	MAIN OFFICE	PO Box 580	Curry	Clovis	NM	88101-3861	USA
U.S. Bank, N.A.	SAN RAFAEL	5800 Northga...	Marin	San Rafael	CA	94903-6831	USA
Wells Fargo ...	529 & FRY	20440 Fm 52...	Harris	Cypress	TX	77433-3322	USA

Defects

- Portal-Jackets: **CPL Pricing** tab was remaining visible when user voided the **CPL** from **CPL Pricing** tab.
- Portal-Jackets/PPE: The liability was not getting a negative value in the reversal Line item when user cancelled a **Jacket** or **PPE**.
- Portal-PPE: An incorrect error message was displayed on **PPE** screen when user entered invalid date in **Original Policy** date field and clicked the **Save/Preview** button.
- Portal-Jackets: **CPL Pricing** tab was remaining visible when the user voided the **CPL** from **CPL Pricing** tab.
- Portal-Jackets/PPE: The liability was not getting a negative value in reversal **Line** item when user cancelled a **Jacket** or **PPE**.
- Portal - PPE: There was an **Unexpected Error** message upon saving the **PPE** request when the user entered the wrong/invalid **OPN** number.
- Portal-Jacket: Value in **Cancel Date** field on the **Endorsement** tab was not displayed when user cancelled a **Jacket**.

Additional Information

Training

More information about Stewart Access functionality is available in the Stewart Access Online Help. For additional training and documentation including Quick Reference Cards, please see the [Stewart Access Training Center](#).

Technical Support

For technical support, contact the Stewart Customer Care Center at 1.877.800.3132 or CustomerCare@stewart.com.