



USER GUIDE FOR STEWART TITLE GUARANTY COMPANY INTEGRATION FOR CPL & POLICY JACKET

HOW-TO ADD STEWART TITLE GUARANTY COMPANY CREDENTIALS IN SNAPCLOSE

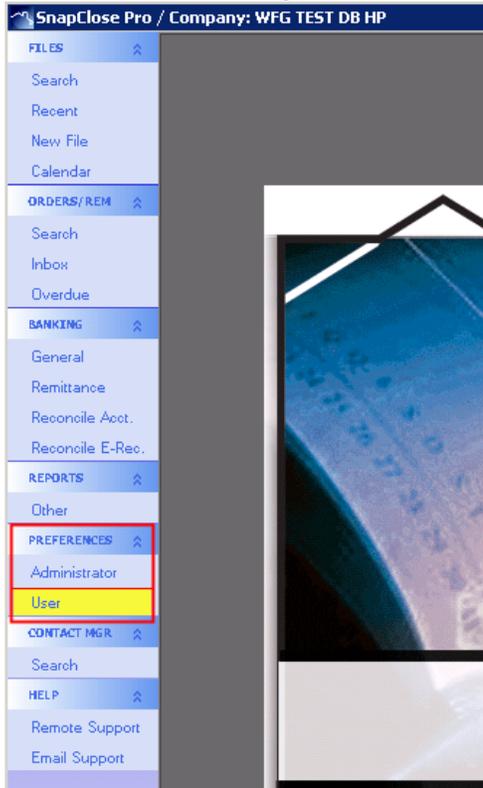
STEP 1:

Open the program and sign in with your SnapClose username & password & click [OK]

A dialog box titled "Please Log In" with a light blue background. It contains three input fields: "Username:" with the text "UserName", "Password:" with a masked password "*****", and "Company:" with a dropdown menu showing "Comerstone Abstract, LLC". There is a checkbox for "Save My Login Information" which is unchecked. At the bottom are "OK" and "Cancel" buttons. The version number "v. 1.6.6.119" is visible in the bottom right corner.

STEP 2:

Note the left-hand navigation column, under **Preferences** click on the link labeled **User**



STEP 3:

Note the User section labeled Partner Integration Settings. Click the down arrow and choose Stewart Title Guaranty Company by selecting "**STEWART**" under Partner Integration Settings

A dialog box titled "Partner Integration Settings" with a light blue background. It features a "Partner:" dropdown menu with "STEWART" selected, highlighted in yellow, and a red box around the dropdown arrow. Below are "User Name:" and "Password:" input fields. A "Save/Update" button is located at the bottom right.

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STEP 4:

Enter your Stewart Title Guaranty Company [User Name] & [Password], then click [Save/Update]

Partner Integration Settings

Partner: STEWART

User Name: STEWART@stewarttitle.com

Password: *****

Save/Update

****Note, repeat steps 1 through 4 for each SnapClose user utilizing integration for Stewart Title Guaranty Company***

HOW-TO ADD STEWART TITLE GUARANTY COMPANY AS AN UNDERWRITER ON A FILE IN SNAPCLOSE

STEP 1:

Open or create a file; making sure to add the file's Profile tab data including:

- Lender** party and enter a [Loan Number] to be included on the requested form(s) and
- Underwriter** set to [Stewart Title Guaranty Company]

Branch: CMS Title Agency (Rumson)

Underwriter: Stewart Title Guaranty Company

File Status: System Generated

STEP 2:

Enter a [Closing Date:] as this date is mandatory for generating the CPL and/or Policy Jacket, if the closing date has not been determined – add Today's Date from the Closing Date drop down arrow

Closing Information

Closing Date: 05/30/2017 9:00 AM

Closer:

Notary:

Closing Place: None

Closing Completed.:

**Note; you may always change the [Closing Date] at any time in SnapClose*

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USER GUIDE FOR STEWART TITLE GUARANTY COMPANY INTEGRATION FOR CPL & POLICY JACKET

HOW TO CREATE THE STEWART TITLE GUARANTY COMPANY - CPL IN SNAPCLOSE

STEP 1 {GENERATING THE CPL}:

Click on the Commitment tab and click the button labeled [CPL] at the bottom right-hand side of the window

The screenshot shows the SnapClose interface with the 'Commitment' tab selected in the top navigation bar. Below the navigation bar, there are several input fields for 'Fill Using', 'Commitment Date', 'Time', and 'Expiration Date'. At the bottom of the window, there is a 'Show:' section with several checked checkboxes: 'Vesting', 'Legal/Property Description', 'Requirements', and 'Exceptions'. The 'CPL' button is highlighted with a red box.

STEP 2-a {REQUEST CPL WINDOW APPEARS}:

You will see all the data pulled from the file's Profile tab

However, there are a few items at the top of the window that needs to be selected by choosing the information from the drop-down lists;

- a) **Agency**: chose from drop-down list if more than one agency;
 - b) **Location**: chose from drop-down list if more than one location;
 - c) **Branch**: chose from drop-down list if more than one branch;
 - d) **Covered Party**: chose from drop-down list which party (Lender, Buyer/Borrower, etc.) the CPL is going to cover, note the covered parties are determined for the State of the property on the file;
 - e) **Form**: drop-down arrow lists the CPL types available for the State of the property on the file
- c) Click on [Order CPL] button

The screenshot shows the 'Request CPL' window. At the top, there are three drop-down lists: 'Agency' (StewartAccess Test Agency), 'Location' (StewartAccess Test Agency Inc - 1980 Post Oak Suite 800), and 'Branch' (Corp Admin Office). Below these, there are fields for 'Loan #', 'Loan Amount', 'Covered Party' (Lender), and 'Form' (NJ Single Transaction Closing Service Letter CSL). The 'Lender Information' section includes fields for Name, Address, City, State, and Zip. The 'Buyer/Borrower' and 'Seller/Owner' sections are also visible. At the bottom, there is an 'Order CPL' button and a 'Submit Date' field.

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STEP 2-b [continued]:

Additional information may be needed:

- Secondary Agency, Approved Attorney, None:** chose by selecting the appropriate radio button as to which applies to the CPL being ordered;
- Lender Information: enter any changes necessary for the Lender information being pulled from the Lender party as entered in the Profile tab

The screenshot shows the 'Request CPL' form with the following fields and values:

- Agency: StewartAccess Test Agency
- Location: StewartAccess Test Agency Inc - 1980 Post Oak Suite 800
- Branch: Corp Admin Office
- Loan #: 003158
- Loan Amount: 200000
- Covered Party: Lender
- Form: NJ Single Transaction Closing Service Letter CSL
- Lender Information:**
 - Name: Valley National Bank
 - Address: 1334 U.S. Highway 22 East
 - City: North Plainfield
 - State: NEW JERSEY
 - Zip: 07060
 - Lender Successor Language: Its successors and/or assigns
- Buyer/Borrower: Evelyn A. Cassidy, Thomas H. Cassidy
- Seller/Owner: Jonathan Price, Patricia Price
- Radio buttons: Secondary Agency, Approved Attorney, None
- Buttons: Order CPL, Submit Date

STEP 2-c [continued]:

Static Information from the file:

- Loan #:** pulled from the Lender party on the Profile tab, any changes necessary – go to the Profile tab, edit the Lender Loan #;
- Loan Amount:** pulled from the Lender party on the Profile tab, any changes necessary – go to the Profile tab, edit the Lender Principal Amount;
- Buyer/Borrower:** the names of the Parties as entered on the Profile tab, any changes necessary – go to the Profile tab and edit the parties
- Seller/Owner:** the names of the Parties as entered on the Profile tab, any changes necessary – go to the Profile tab and edit the parties

This screenshot is identical to the previous one, but with red boxes highlighting the 'Loan # 003158' and 'Loan Amount: 200000' fields.

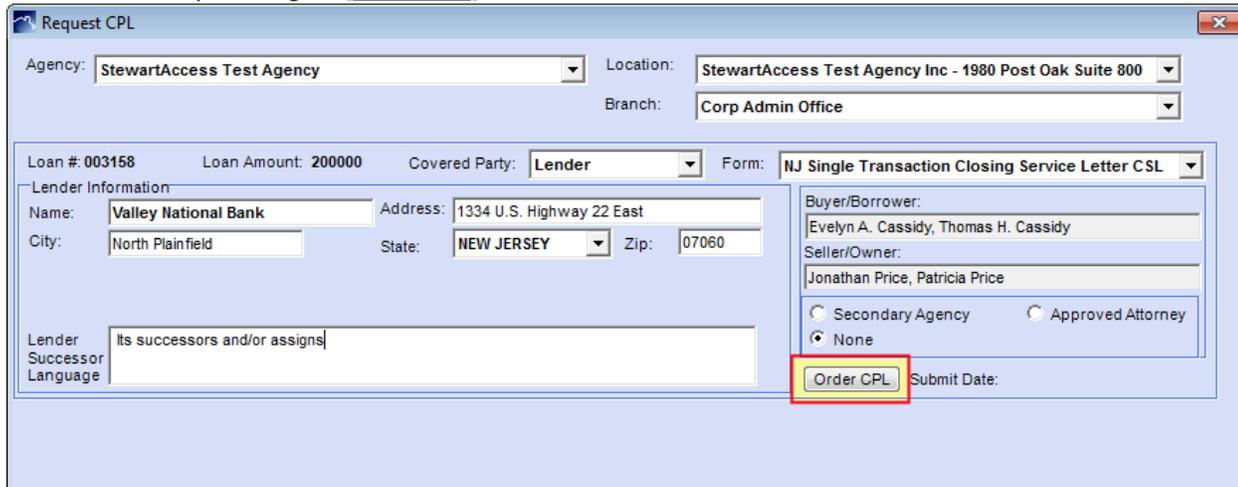
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STEP 3:

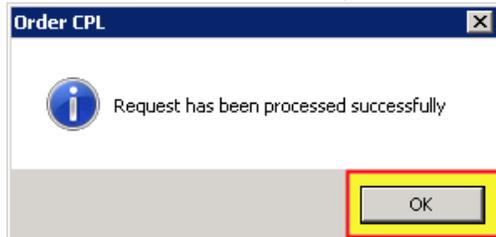
Order the CPL by clicking on [\[Order CPL\]](#)



The "Request CPL" window displays the following information:

- Agency: StewartAccess Test Agency
- Location: StewartAccess Test Agency Inc - 1980 Post Oak Suite 800
- Branch: Corp Admin Office
- Loan #: 003158, Loan Amount: 200000
- Covered Party: Lender
- Form: NJ Single Transaction Closing Service Letter CSL
- Lender Information:
 - Name: Valley National Bank
 - Address: 1334 U.S. Highway 22 East
 - City: North Plainfield
 - State: NEW JERSEY
 - Zip: 07060
- Buyer/Borrower: Evelyn A. Cassidy, Thomas H. Cassidy
- Seller/Owner: Jonathan Price, Patricia Price
- Options: Secondary Agency, Approved Attorney, None
- Buttons: [Order CPL](#) (highlighted), Submit Date:

"[Order CPL](#)" window come up to confirm the Request has been processed, Click [\[OK\]](#)



The "Order CPL" dialog box displays the following information:

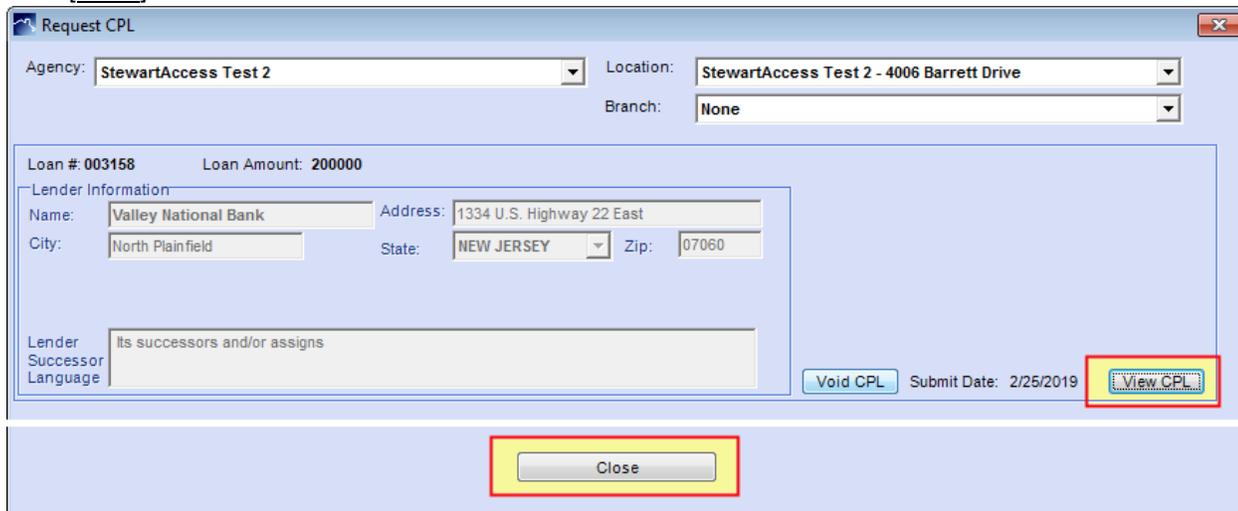
- Message: Request has been processed successfully
- Button: [OK](#) (highlighted)

STEP 4:

The CPL document is saved and can be opened in the Docs tab.

The CPL document can also be opened right from the "**Request CPL**" window by clicking on [\[View CPL\]](#)

Click [\[Close\]](#) to exit



The "Request CPL" window displays the following information:

- Agency: StewartAccess Test 2
- Location: StewartAccess Test 2 - 4006 Barrett Drive
- Branch: None
- Loan #: 003158, Loan Amount: 200000
- Lender Information:
 - Name: Valley National Bank
 - Address: 1334 U.S. Highway 22 East
 - City: North Plainfield
 - State: NEW JERSEY
 - Zip: 07060
- Buttons: [Void CPL](#), Submit Date: 2/25/2019, [View CPL](#) (highlighted)
- Bottom Bar: [Close](#) (highlighted)

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STEP 5:

[[Void CPL](#)] button

If you need to make any changes to the CPL, e.g. Borrower name(s), Lender, loan number, or even the property address, you need to make the change on the Profile tab first and then open the [[CPL](#)], then click on [[Void CPL](#)];

Void CPL window will open where a Reason radio button must be selected; click on [[Void CPL](#)] to complete the process

Then follow steps 2 through 4 to generate a new CPL with the updated information

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USER GUIDE FOR STEWART TITLE GUARANTY COMPANY INTEGRATION FOR CPL & POLICY JACKET

HOW TO CREATE THE STEWART TITLE GUARANTY COMPANY – OWNER POLICY JACKET IN SNAPCLOSE

STEP 1 {GENERATING THE POLICY JACKET}:

Click on the Policy tab;

- a) the "Policy Jacket" window will open; select the [Agency:] & [Location:] from the drop-down lists, if necessary
- b) click on [OK] to continue

Policy Jacket

Agency: StewartAccess Test 2

Location: StewartAccess Test 2 - 4006 Barrett Drive

OK Cancel

- b) "Owner Policy" section is at the top which includes the [Policy #] field which will automatically populate with the Policy Jacket number issued on the ordered Jacket
- c) "Loan Policies" section where like the Owner Policy includes the [Policy #] field which will automatically populate with the Policy Jacket number issued on the ordered Jacket

Profile Orders & Reminders Commitment Invoice CD 1099 Disburse E-Record **Policy** Docs Notes Tasks Courier Lender Exchange

Owner Policy:

Amount \$300,000.00

Policy # Deed From

Effective Date Issued To

Document Date

Recorded Date Book Page Instrument #

Policy Jacket Type Submit Date

Order Jacket

Loan Policies:

Type	Lender	Amount	Policy#
Primary	Valley National Bank	\$200,000.00	

Policy # Mortgage From

Effective Date

Document Date

Recorded Date Book Page Instrument #

Policy Jacket Type Submit Date

Order Jacket

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STEP 2:

In the Owner Policy section, click on the drop-down arrow in the field labeled [*Policy Jacket Type*] and choose the Owner's Policy Jacket for which is applicable to the file.
(*Note, the list of owner's policy jackets are populated by Stewart Title Guaranty Company and may be different from the below list depending on the property's "State.")

The screenshot shows the 'Owner Policy' form with the following fields: Amount (\$300,000.00), Policy #, Deed From (Jonathan Price and Patricia Price, husband and wife), Effective Date, Issued To (Evelyn A. Cassidy and Thomas H. Cassidy, wife and husband), Document Date, Recorded Date (02/25/2019), Book, Page, Instrument #, and Policy Jacket Type. The Policy Jacket Type dropdown menu is open, showing options: (None), NJRB 1-10 U.S. Policy 4-15-2014, NJRB 1-15 Owners Policy 9-10-2007, and NJRB 1-16 Homeowners Policy 5-15-2014. A red box highlights the dropdown arrow and the list of options.

STEP 3:

After selecting the appropriate Owner's "Policy Jacket Type", Click on [*Order Jacket*] button

The screenshot shows the 'Owner Policy' form with the following fields: Amount (\$300,000.00), Policy #, Deed From (Jonathan Price and Patricia Price, husband and wife), Effective Date, Issued To (Evelyn A. Cassidy and Thomas H. Cassidy, wife and husband), Document Date, Recorded Date (02/25/2019), Book, Page, Instrument #, and Policy Jacket Type. The Policy Jacket Type dropdown menu is now closed, and the selected option is 'NJRB 1-15 Owners Policy 9-10-2007'. A red box highlights the 'Order Jacket' button.

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STEP 4:

The "Request Policy Jacket" window will appear, there are multiple data fields on this window to be completed. (*Note, mandatory fields are noted as red labels. The rest of the fields are requested but not mandatory.)

a) "Request Policy Jacket" window shows the Owner's Policy fields to be completed:

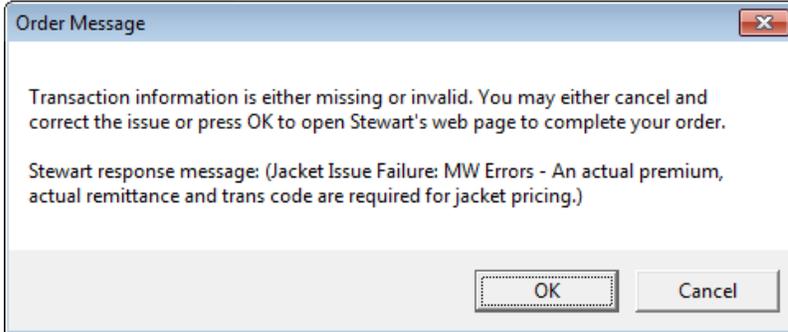
- 1) [Policy Amount:] – mandatory field will be populated with the Purchase Price of the file
- 2) [Effective Date:] – mandatory field will be populated with the closing date entered on the Profile Tab

**Note; there is an [Effective Date:] drop-down list that also includes the Recorded Date as an option, (if entered)*

- 3) [Actual Premium:] – mandatory field will need to be populated by the agent

**Note; the premiums are calculated on the Invoice tab and the premium amount is entered in this field*

- 4) [Actual Remittance:] – although not a mandatory field, it will need to be populated by the agent or the user will be advised to immediately go Stewart Title's website to complete the transaction upon clicking on the [Order Policy Jacket] button, via the "Order Message" as shown below



- 5) [Transaction Code:] – although not a mandatory field, it will need to be populated by the agent or the program will try to enter the transaction code, however if that is not possible the user will be directed to Stewart Title's website as noted above

(*Note, it is the agent's responsibility to review and make sure the correct information is entered.)

b) Press [Order Policy Jacket]

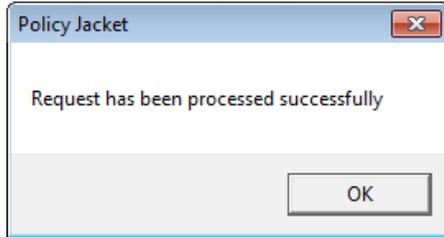
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STEP 5:

"Policy Jacket" request processed confirmation window and click [OK]



STEP 6:

[Policy #] populates automatically; [Policy Jacket Type] and [Submit Date] populates for reference

Owner Policy:				
Amount	\$300,000.00			
Policy #	O-0000-984347561	Deed From	Jonathan Price and Patricia Price, husband and wife	
Effective Date		Issued To	Evelyn A. Cassidy and Thomas H. Cassidy, wife and husba	
Document Date				
Recorded Date	02/25/2019	Book	Page	Instrument #
Policy Jacket Type	NJRB 1-15 Owners Policy 9-10-2007	Submit Date	2/25/2019 3:03 P	
Void Jacket		View Document		

STEP 7:

The Owner's Policy Jacket document is saved and can be opened in the Docs tab. The Owner's Policy Jacket document can also be opened right from the Policy Tab window by clicking on [View Document] button.

Owner Policy:				
Amount	\$300,000.00			
Policy #	O-0000-984347561	Deed From	Jonathan Price and Patricia Price, husband and wife	
Effective Date		Issued To	Evelyn A. Cassidy and Thomas H. Cassidy, wife and husba	
Document Date				
Recorded Date	02/25/2019	Book	Page	Instrument #
Policy Jacket Type	NJRB 1-15 Owners Policy 9-10-2007	Submit Date	2/25/2019 3:03 P	
Void Jacket		View Document		

STEP 8:

[**Void Jacket**] button

If you need to make any changes to the Owner's Policy Jacket, e.g. Policy Amount, Effective Date, Insured name(s), etc. you need to press [Void Jacket] and make any changes, SnapClose will delete the prior Owner's Policy Jacket in the Docs tab so there will be no duplicates.

Owner Policy:						
Amount	\$300,000.00					
Policy #	OP03064878	Deed From	Patricia Price, single woman			
Dated		Remitted Date		Issued To	Thomas H. Cassidy, single man	
Recorded		@		Book	Page	Inst #
Policy Jacket Type	Owners Policy Standard	Submit Date	2/25/2019 3:17 PM			
Void Jacket		View Document				

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STEP 8: (CONTINUED)

[**Void Jacket**] button

After clicking on the [**Void Jacket**] button, the Void Policy Jacket window will open where a [Void Reasons] radio button must be selected; click on [**Void Policy Jacket**] to complete the process

Void Policy Jacket - O-0000-984347561

Policy Jacket Type: NJRB 1-15 Owners Policy 9-10-2007

Void Reasons

- Cancelled Due to Revision
- Entered in Error
- Jacket Data or Type Changed
- Jacket Not Issued
- Transaction Cancelled
- Other

Void Policy Jacket Close

Then follow steps 2 through 5 to generate a new Owner's Policy Jacket with the updated information

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HOW TO CREATE THE STEWART TITLE GUARANTY COMPANY – LOAN POLICY JACKET IN SNAPCLOSE

STEP 1 {GENERATING THE POLICY JACKET}:

Click on the Policy tab;

- the "Policy Jacket" window will open; select the [Agency:] & [Location:] from the drop-down lists, if necessary
- click on [OK] to continue

- "Owner Policy" section is at the top which includes the [Policy #] field which will automatically populate with the Policy Jacket number issued on the ordered Jacket
- "Loan Policies" section where like the Owner Policy includes the [Policy #] field which will automatically populate with the Policy Jacket number issued on the ordered Jacket

Amount	Policy #	Deed From	Issued To	Book	Page	Instrument #
\$300,000.00						

Type	Lender	Amount	Policy#
Primary	Valley National Bank	\$200,000.00	

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STEP 2:

In the Loan Policy section, click on the drop-down arrow in the field labeled "**Policy Jacket Type**" and choose the Policy Jacket for which is applicable to the file. The list of policy jackets are populated by Stewart Title Guaranty Company and may be different per property state.

Loan Policies:

Type	Lender	Amount	Policy#
Primary	Valley National Bank	\$200,000.00	

Policy # [] Mortgage From Evelyn A. Cassidy and Thomas H. Cassidy, wife and husband

Effective Date []

Document Date []

Recorded Date 02/25/2019 [] Book [] Page [] Instrument # []

Policy Jacket Type [] Submit Date []

(None)
NJRB 2-14 Short Form Expanded Residential Loan Policy 4-2-2014 - 2-15-2016
NJRB 2-16 Loan Policy 2-15-2016
NJRB 2-17 Expanded Coverage Residential LP - Current Asmts 2-15-16
NJRB 2-18 Short Form Expanded Coverage LP - Current Asmts 2-15-16
NJRB 2-19 Short Form Residential Loan Policy - Current Violations 2-15-2016
NJRB 2-20 ALTA Residential Limited Coverage Mortgage Modification Policy 12-1-2014

STEP 3:

After selecting the appropriate Loan [*Policy Jacket Type*], Click on [*Order Jacket*] button

Owner Policy:

Amount	\$300,000.00
Policy #	Deed From Jonathan Price and Patricia Price, husband and wife
Effective Date	Issued To Evelyn A. Cassidy and Thomas H. Cassidy, wife and husband
Document Date	
Recorded Date	02/25/2019 [] Book [] Page [] Instrument # []
Policy Jacket Type	NJRB 1-15 Owners Policy 9-10-2007 [] Submit Date []
[]	Order Jacket []

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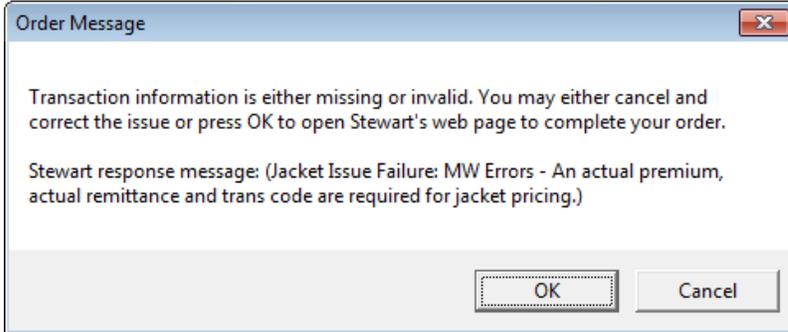


USER GUIDE FOR STEWART TITLE GUARANTY COMPANY INTEGRATION FOR CPL & POLICY JACKET

STEP 4:

The "Request Policy Jacket" window will appear, there are multiple data fields on this window to be completed. (*Note, mandatory fields are noted as red labels. The rest of the fields are requested but not mandatory.)

- a) "Request Policy Jacket" window shows the Owner's Policy fields to be completed:
 - 1) [Policy Amount:] – mandatory field will be populated with the Purchase Price of the file
 - 2) [Effective Date:] – mandatory field will be populated with the closing date entered on the Profile Tab
**Note; there is an [Effective Date:] drop-down list that also includes the Recorded Date as an option, (if entered)*
 - 3) [Actual Premium:] – mandatory field will need to be populated by the agent
**Note; the premiums are calculated on the Invoice tab and the premium amount is entered in this field*
 - 4) [Actual Remittance:] – although not a mandatory field, it will need to be populated by the agent or the user will be advised to immediately go Stewart Title's website to complete the transaction upon clicking on the [Order Policy Jacket] button, via the "Order Message" as shown below



- 5) [Transaction Code:] – although not a mandatory field, it will need to be populated by the agent or the program will try to enter the transaction code, however if that is not possible the user will be directed to Stewart Title's website as noted above

(*Note, it is the agent's responsibility to review and make sure the correct information is entered.)

- b) Press [Order Policy Jacket]

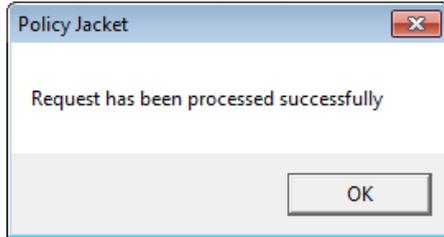
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USER GUIDE FOR STEWART TITLE GUARANTY COMPANY INTEGRATION FOR CPL & POLICY JACKET

STEP 5:

"Policy Jacket" request processed confirmation window and click [OK]



STEP 6:

[Policy #:] populates automatically; [Policy Jacket Type:] and [Submit Date:] populates for reference

Type	Lender	Amount	Policy#
Primary	Valley National Bank	\$200,000.00	

Policy # M-0000-984349671 Mortgage From Evelyn A. Cassidy and Thomas H. Cassidy, wife and husband

Effective Date [dropdown]
Document Date [dropdown]
Recorded Date 02/25/2019 Book Page Instrument #
Policy Jacket Type NJRB 2-16 Loan Policy 2-15-2016 Submit Date 2/25/2019 3:46 P
Void Jacket View Document

STEP 7:

The Loan Policy Jacket document is saved and can be opened in the Docs tab. The Loan Policy Jacket document can also be opened right from the Policy Tab window by clicking on [View Document] button.

Type	Lender	Amount	Policy#
Primary	Valley National Bank	\$200,000.00	

Policy # M-0000-984349671 Mortgage From Evelyn A. Cassidy and Thomas H. Cassidy, wife and husband

Effective Date [dropdown]
Document Date [dropdown]
Recorded Date 02/25/2019 Book Page Instrument #
Policy Jacket Type NJRB 2-16 Loan Policy 2-15-2016 Submit Date 2/25/2019 3:46 P
Void Jacket View Document

STEP 8:

[Void Jacket] button

If you need to make any changes to the Loan Policy Jacket, e.g. Policy Amount, Effective Date, Insured name(s), etc. you need to press [Void Jacket] and make any changes, SnapClose will delete the prior Loan Policy Jacket in the Docs tab so there will be no duplicates.

Type	Lender	Amount	Policy#
Primary	Valley National Bank	\$200,000.00	

Policy # M-0000-984349671 Mortgage From Evelyn A. Cassidy and Thomas H. Cassidy, wife and husband

Effective Date [dropdown]
Document Date [dropdown]
Recorded Date 02/25/2019 Book Page Instrument #
Policy Jacket Type NJRB 2-16 Loan Policy 2-15-2016 Submit Date 2/25/2019 3:46 P
Void Jacket View Document

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USER GUIDE FOR STEWART TITLE GUARANTY COMPANY INTEGRATION FOR CPL & POLICY JACKET

STEP 8: (CONTINUED)

[**Void Jacket**] button

After clicking on the [**Void Jacket**] button, the Void Policy Jacket window will open where a [Void Reasons] radio button must be selected; click on [**Void Policy Jacket**] to complete the process

Void Policy Jacket - M-0000-984349671

Policy Jacket Type: NJRB 2-16 Loan Policy 2-15-2016

Void Reasons

- Cancelled Due to Revision
- Entered in Error
- Jacket Data or Type Changed
- Jacket Not Issued
- Transaction Cancelled
- Other

Void Policy Jacket Close

Then follow steps 2 through 5 to generate a new Owner's Policy Jacket with the updated information