

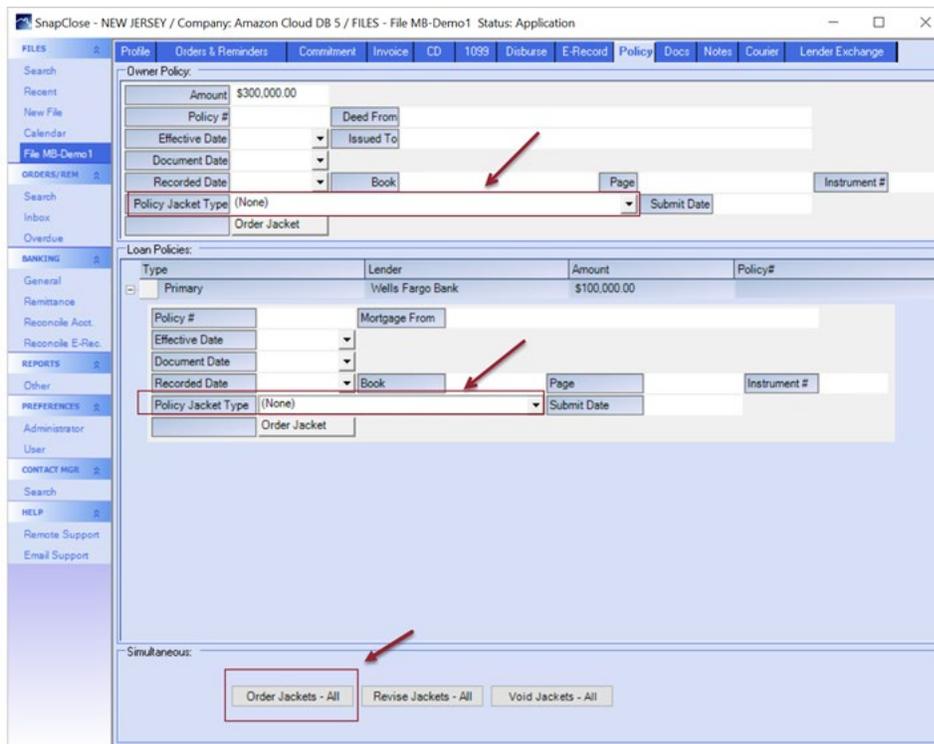
Stewart Access 2.5 and SnapClose - Jacket

Follow the steps below to access utilize the Stewart Access 2.5 integration with SnapClose.

Note: This Quick Reference Card assumes a file has been entered and you are ready to issue a CPL.

Steps

1. Click the **Policy** tab, then select the **Policy Jacket Type** for each policy needed. You may **Order Jacket(s)** separately or select **Order Jackets – All** to prepare and create them simultaneously.



The screenshot displays the SnapClose application interface. The main window title is "SnapClose - NEW JERSEY / Company: Amazon Cloud DB 5 / FILES - File MB-Demo1 Status: Application". The interface features a navigation menu on the left with categories like FILES, BANKING, REPORTS, PREFERENCES, CONTACT MGR, and HELP. The main content area has several tabs: Profile, Orders & Reminders, Commitment, Invoice, CD, 1099, Disburse, E-Record, Policy, Docs, Notes, Counter, and Lender Exchange. The "Policy" tab is active, showing a form for "Owner Policy" and "Loan Policies". The "Owner Policy" section includes fields for Amount (\$300,000.00), Policy #, Deed From, Effective Date, Issued To, Document Date, Recorded Date, Book, Page, Instrument #, Policy Jacket Type (None), and Submit Date. The "Loan Policies" section includes a table with columns for Type, Lender, Amount, and Policy#, and a form for Mortgage From, Effective Date, Document Date, Recorded Date, Book, Page, Instrument #, Policy Jacket Type (None), and Submit Date. At the bottom, the "Simultaneous" section contains buttons for "Order Jackets - All", "Revise Jackets - All", and "Void Jackets - All". Red arrows in the original image point to the "Policy Jacket Type" dropdown menu in both the "Owner Policy" and "Loan Policies" sections, and the "Order Jackets - All" button in the "Simultaneous" section.

On the following screen, your policy information will be displayed. Policy Premiums and Remittance amounts are displayed if entered or calculated in the Invoice tab.

Additionally, if an Electronic Signature has been created and saved in the User Setup area, that signature is displayed. One be added manually if desired.

Endorsements, Endorsement Premiums and Remittance information entered on the Invoice will appear in the Endorsement grid. Select the endorsements to be included and make any edits as necessary.

Repeat for each policy.

Note: If preparing a Short Form, selecting the endorsement checkboxes will also select them on the policy jacket.

Once all selections or edits have been made, click **Order Policy Jacket**.

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Owner Policy:

Request Policy Jacket

Owner Wells Fargo Bank

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

Policy Amount: \$300,000.00 Actual Premium: \$1,375.00 Effective Date: 08/31/2021 Closing Date

Actual Remittance: \$206.25

None
 Special Charges
 Additional Charges
 Simultaneous
 Refinance/Reissue

Mark Bob
Add Signature Clear Signature

Endorsements	Premium	Remittance
<input type="checkbox"/> NJ Fairway (LLC) Endorsement	\$0.00	\$0.00
<input type="checkbox"/> NJ Fairway (Partnership) Endorsement	\$0.00	\$0.00
<input type="checkbox"/> ALTA 3.1-06 Zoning-Completed Structure (Owner's)	\$0.00	\$0.00

Order Policy Jacket Close

Short Form Loan Policy:

Request Policy Jacket

Owner Wells Fargo Bank

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

Policy Amount: \$300,000.00 Actual Premium: \$1,375.00 Effective Date: 08/31/2021 Closing Date

Actual Remittance: \$206.25

None
 Special Charges
 Additional Charges
 Simultaneous
 Refinance/Reissue

Mark Bob
Add Signature Clear Signature

Endorsements	Premium	Remittance
<input type="checkbox"/> NJ Fairway (LLC) Endorsement	\$0.00	\$0.00
<input type="checkbox"/> NJ Fairway (Partnership) Endorsement	\$0.00	\$0.00
<input type="checkbox"/> ALTA 3.1-06 Zoning-Completed Structure (Owner's)	\$0.00	\$0.00

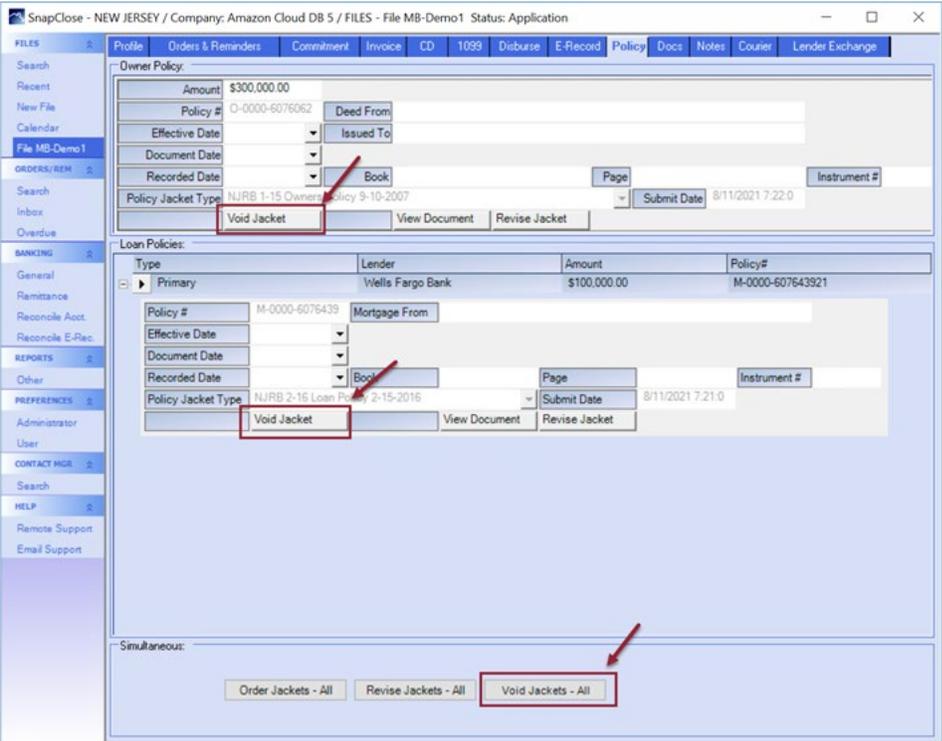
Order Policy Jacket Close

Stewart Access 2.5 and SnapClose - Jacket

Once your request is processed, the following screen appears. The policy serial numbers are displayed. Click **View Document** to download, print or email the document from the image rendered.



To void one or all jackets, click the appropriate option.



Stewart Access 2.5 and SnapClose - Jacket

Select a reason for voiding the policy then click **Void Policy Jacket**. This will need to be done for each policy.

