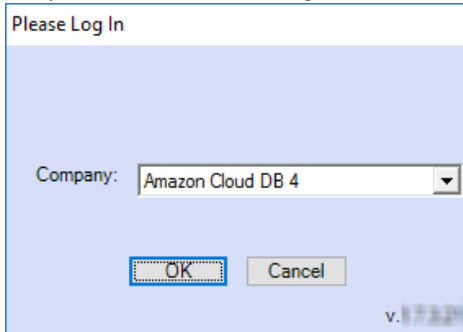


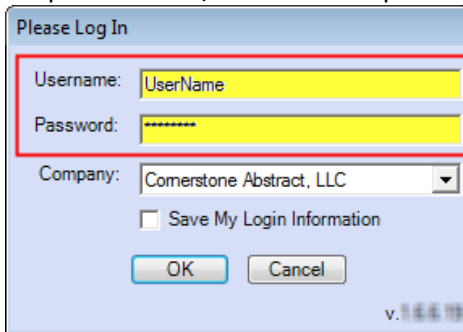
## HOW-TO ADD STEWART TITLE GUARANTY COMPANY CREDENTIALS IN SNAPCLOSE

### STEP 1:

SnapClose Cloud users log into the Cloud using you log in credentials and click [\[OK\]](#)

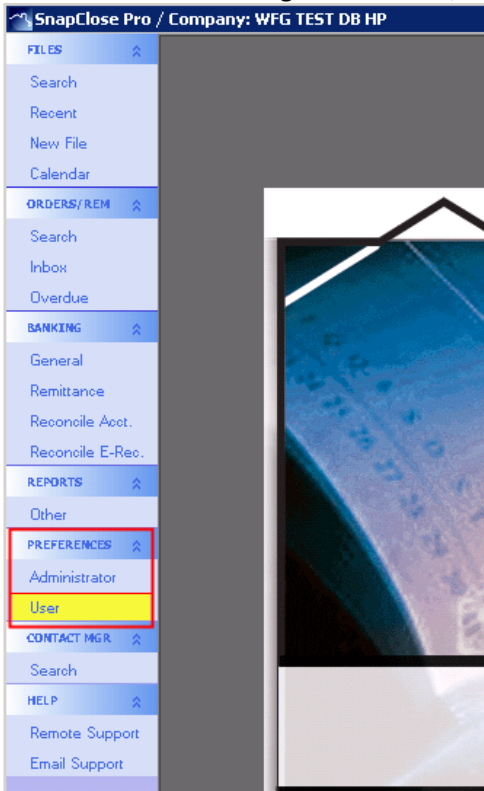


SnapClose Client/Server users open the program and sign in with your SnapClose username & password & click [\[OK\]](#)



### STEP 2:

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



(CONTINUED ON NEXT PAGE)



# USER GUIDE FOR STEWART TITLE GUARANTY COMPANY INTEGRATION 2.5

### 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

Partner Integration Settings

Partner: STEWART

User Name:

Password:

Save/Update

### STEP 4:

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

Partner Integration Settings

Partner: STEWART

User Name: JCTPS17E17E7P@Snap

Password: \*\*\*\*\*

Save/Update

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

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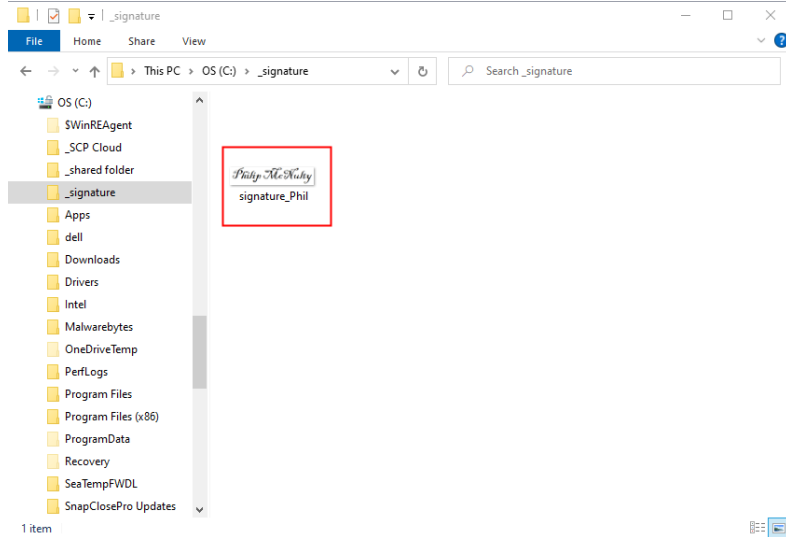


# USER GUIDE FOR STEWART TITLE GUARANTY COMPANY INTEGRATION 2.5

## HOW-TO ADD SIGNATURES STEWART TITLE GUARANTY COMPANY SIGNATURES IN SNAPCLOSE

### STEP 1:

Scan your signature and save it to a local folder on your computer.

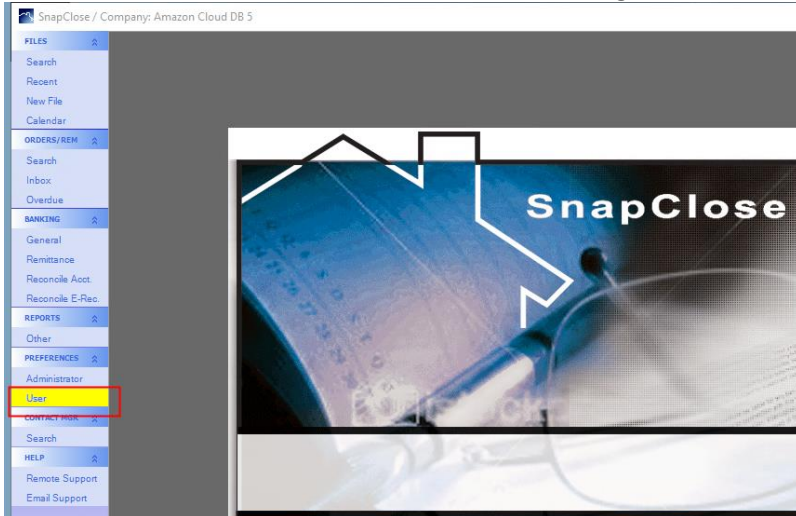


### STEP 2:

Log in to SnapClose as explained in Step 1 of [How-To Add Stewart Title Guaranty Company Credentials In SnapClose.](#)

### STEP 3:

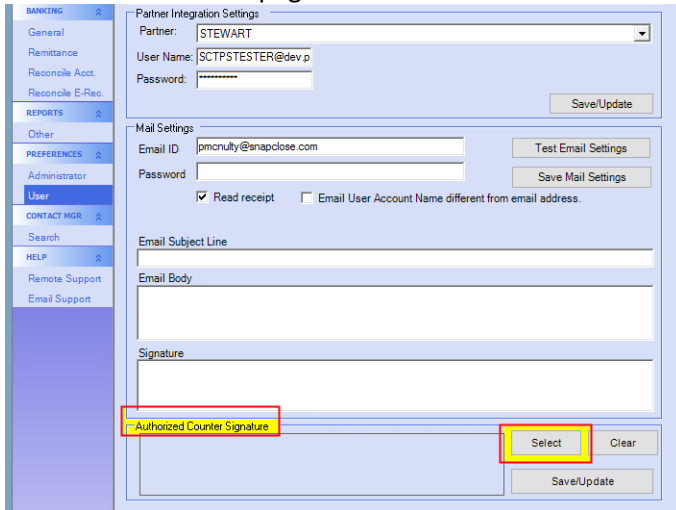
Click on the User link under the Preferences heading



(CONTINUED ON NEXT PAGE)

## STEP 4:

At the bottom of the page in the window labeled Authorized Counter Signature, click on [Select] button



## STEP 5:

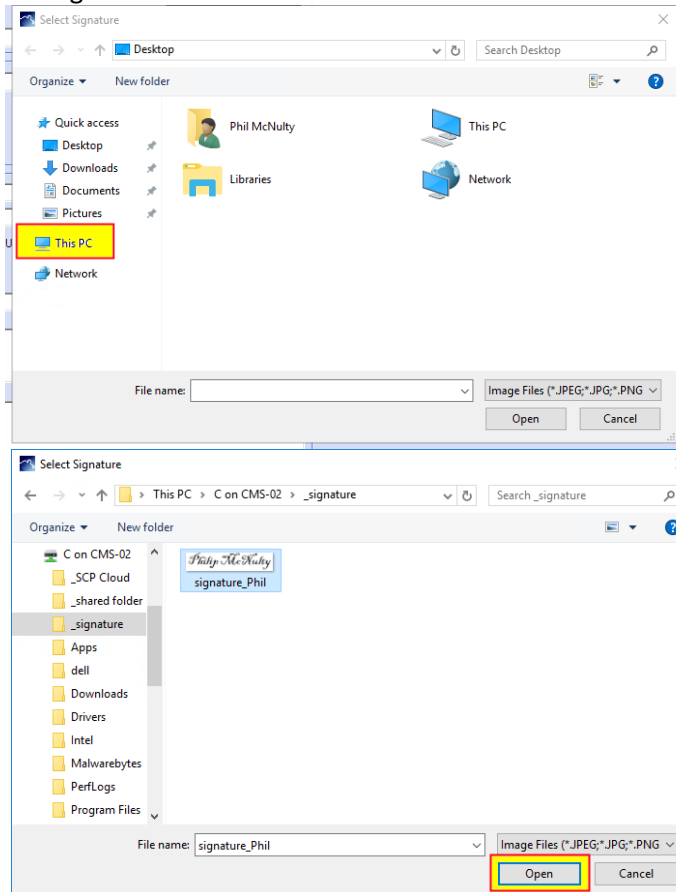
"Select Signature" window will open and select the folder where the scanned signature was saved & select the file and press open or double-click on the signature file

**Client/Server users skip to Step 7**

**Cloud Users Follow Instruction In Step 6 to open folder**

## STEP 6:

Select the drive labeled "This PC" that the signature folder is located & select the file and press open or double-click on the signature file



(CONTINUED ON NEXT PAGE)



# USER GUIDE FOR STEWART TITLE GUARANTY COMPANY INTEGRATION 2.5

## STEP 7:

Note, the signature in the Authorized Counter Signature box and press [Save/Update] button. You will now be able to enter the signature on the Stewart Title forms.

SnapClose / Company: Amazon Cloud DB 5 / PREFERENCES - User

**FILES**

- Search
- Recent
- New File
- Calendar

**ORDERS/REM**

- Search
- Inbox
- Overdue

**BANKING**

- General
- Remittance
- Reconcile Acct.
- Reconcile E-Rec.

**REPORTS**

- Other

**PREFERENCES**

- Administrator
- User**
- CONTACT MGR
- HELP
- Remote Support
- Email Support

**General Settings**

Version Number: v.1.7.3.16

Number of Files to Show on Recently Used (5 - 100):

Starting Location:

**FATIC Settings**

User Name:

Password:  Underwriter Code:

Office:

**Partner Integration Settings**

Partner:

User Name:

Password:

**Mail Settings**

Email ID:

Password:

Read receipt  Email User Account Name different from email address.

Email Subject Line:

Email Body:

Signature:

**Authorized Counter Signature**

*Philip McNulty*

(CONTINUED ON NEXT PAGE)



# USER GUIDE FOR STEWART TITLE GUARANTY COMPANY INTEGRATION 2.5

## 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:

- a) **Lender** party and enter a [Loan Number] to be included on the requested form(s) and
- b) **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*:] this date is mandatory for generating the **Policy Jacket**.

**\*Note for CPL, Commitment, Guarantee, and Binder Jackets no closing date is required.**

Closing Information	
Closing Date:	05/30/2011 9:00 AM
Closer:	
Notary:	
Closing Place:	None
Closing Completed.:	<input type="checkbox"/>

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

(CONTINUED ON NEXT PAGE)



# USER GUIDE FOR STEWART TITLE GUARANTY COMPANY INTEGRATION 2.5

## 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 side of the window

The screenshot shows the SnapClose interface with the 'Commitment' tab selected. At the bottom right, the 'CPL' button is highlighted with a red box. Other tabs include Profile, Orders & Reminders, Invoice, CD, 1099, Disburse, E-Record, Policy, Docs, Notes, Tasks, Courier, and Lender Exchange. Below the tabs are fields for 'Fill Using', 'Commitment Date', 'Time', 'Expiration Date', 'Email Alerts', and 'Create Document(s)'. At the bottom, there are checkboxes for 'Vesting', 'Legal/Property Description', 'Requirements', 'Exceptions', 'Mortgages', and 'Surveys', followed by the 'CPL' button and a 'Commitment' button.

### 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;

- Agency:** chose from drop-down list if more than one agency;
- Location:** chose from drop-down list if more than one location;
- Branch:** chose from drop-down list if more than one branch;
- 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;*
- Form:** drop-down arrow lists the CPL types available for the State of the property on the file
- If there is no additional Party and Lender Information including the Successor Language is correct; Click on [**Order CPL**] button

*Additional Steps are continued below*

The screenshot shows the 'Request CPL' window. The 'Agency' field is highlighted in yellow. The 'Location' and 'Branch' fields are also highlighted in yellow. The 'Covered Party' field is highlighted in yellow and has a red box around its dropdown arrow. The 'Form' field is highlighted in yellow and has a red box around its dropdown arrow. The 'Lender Information' section includes fields for Name, Address, City, State, and Zip. The 'Buyer/Borrower' section includes fields for Name and Seller/Owner. The 'Lender Successor Language' field is highlighted in yellow. The 'Order CPL' and 'Submit Date' buttons are highlighted in yellow and have a red box around them.

(CONTINUED ON NEXT PAGE)



# USER GUIDE FOR STEWART TITLE GUARANTY COMPANY INTEGRATION 2.5

## STEP 2-b [continued]:

*Additional information may be needed:*

- Lender Information: edit Lender information changes, as necessary
- Use the Lender Successor Language dropdown list to choose or change the Successor Language, as necessary
- Secondary Agency, Approved Attorney, Settlement Company, or None (default selection):** chose by selecting the appropriate radio button as to which applies to the CPL being ordered;  
*to review how these options work refer to Step 3 below*

The screenshot shows the 'Request CPL' form. The 'Lender Information' section is highlighted with a red box. It includes fields for Name (Franklin Templeton Bank & Trust, FSB), Address (3000 Leadenhall Road), City (Mount Laurel), State (NEW JERSEY), and Zip (08054). Below these fields is a dropdown menu for 'Select Lender Successor Language' with the text 'Its successors and/or assigns, as their interest may appear'. To the right, the 'Buyer/Borrower' and 'Seller/Owner' fields are also highlighted with a red box. The 'Buyer/Borrower' field contains 'Todd Franks, Gerry Franks' and the 'Seller/Owner' field contains 'Christine Perry, Parker Perry'. Below these fields are four radio button options: 'Secondary Agency', 'Approved Attorney', 'Settlement Company', and 'None'. The 'None' option is selected. At the bottom right, there are 'Order CPL' and 'Submit Date:' buttons.

## 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 one above, but with different highlights. The 'Loan #' (00036168) and 'Loan Amount' (\$300,000.00) fields are highlighted with a red box. The 'Buyer/Borrower' and 'Seller/Owner' fields are also highlighted with a red box. The 'None' radio button option is selected.

(CONTINUED ON NEXT PAGE)





# USER GUIDE FOR STEWART TITLE GUARANTY COMPANY INTEGRATION 2.5

SECONDARY AGENCY, APPROVED ATTORNEY, SETTLEMENT COMPANY, OR NONE (DEFAULT SELECTION)

### STEP 3A- {selecting the radio button option of "None"}:

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: Include All Branches
- Loan #: 00036168
- Loan Amount: \$300,000.00
- Covered Party: Lender
- Form: NJ Single Transaction CPL Lender, Purchaser, Lessee or I
- Lender Information: Name: Franklin Templeton Bank & Trust, FSB; Address: 3000 Leadenhall Road; City: Mount Laurel; State: NEW JERSEY; Zip: 08054
- Buyer/Borrower: Todd Franks, Gerry Franks
- Seller/Owner: Christine Perry, Parker Perry
- Radio buttons:  Secondary Agency,  Approved Attorney,  Settlement Company,  None
- Buttons: Order CPL (highlighted in yellow), Submit Date

"Order CPL" window comes up to confirm the Request has been processed, Click [OK]

The "Order CPL" window displays the following information:

- Message: Request has been processed successfully
- Button: OK

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 Agency
- Location: StewartAccess Test Agency Inc - 1980 Post Oak Suite 800
- Branch: Include All Branches
- Loan #: 00036168
- Loan Amount: \$300,000.00
- Covered Party: Lender
- Form: NJ Single Transaction CPL Lender, Purchaser, Lessee or I
- Lender Information: Name: Franklin Templeton Bank & Trust, FSB; Address: 3000 Leadenhall Road; City: Mount Laurel; State: NEW JERSEY; Zip: 08054
- Buttons: Void CPL, Submit Date: 5/7/2021, View CPL (highlighted in yellow)
- Bottom Button: Close (highlighted in yellow)

(CONTINUED ON NEXT PAGE)



# USER GUIDE FOR STEWART TITLE GUARANTY COMPANY INTEGRATION 2.5

## STEP 3B- {selecting the radio button option of "Secondary Agency"}:

- Secondary Agency window pops up;
- a) Click on [Search] for the Secondary Agency or
- b) Chose from the Favorites from the dropdown list
- c) Order the CPL by clicking on [Order CPL]

Request CPL

Agency: StewartAccess Test Agency Location: StewartAccess Test Agency Inc - 1980 Post Oak Suite 800  
Branch: Include All Branches

Loan #: 00311813841 Loan Amount: \$300,000.00 Covered Party: Lender Form: NJ Single Transaction CPL Lender, Purchaser, Lessee or I

**Lender Information**  
Name: Franklin Templeton Bank & Trust, FSB Address: 3000 Leadenhall Road  
City: Mount Laurel State: NEW JERSEY Zip: 08054  
Buyer/Borrower: Todd Franks, Gerry Franks  
Seller/Owner: Christine Perry, Parker Perry  
 Secondary Agency  Approved Attorney  
 Settlement Company  None  
Order CPL Submit Date:

Select Lender Successor Language  
Lender Successor Language: Its successors and/or assigns, as their interest may appear

**Secondary Agency**  
Favorites: Oceanside Title, Inc. - 4442 Lafayette Street Search Favorite  
Name: Oceanside Title, Inc. Address 1: 4442 Lafayette Street  
Address 2: City: Marianna State: FLORIDA Zip: 32446

Close

## STEP 3C- {selecting the radio button option of "Approved Attorney"}:

- Approved Attorney window pops up;
- a) Click on [Search] for the Approved Attorney or
- b) Chose from the Favorites from the dropdown list
- c) Order the CPL by clicking on [Order CPL]

Request CPL

Agency: StewartAccess Test Agency Location: StewartAccess Test Agency Inc - 1980 Post Oak Suite 800  
Branch: Include All Branches

Loan #: 00311813841 Loan Amount: \$300,000.00 Covered Party: Lender Form: NJ Single Transaction CPL Lender, Purchaser, Lessee or I

**Lender Information**  
Name: Franklin Templeton Bank & Trust, FSB Address: 3000 Leadenhall Road  
City: Mount Laurel State: NEW JERSEY Zip: 08054  
Buyer/Borrower: Todd Franks, Gerry Franks  
Seller/Owner: Christine Perry, Parker Perry  
 Secondary Agency  Approved Attorney  
 Settlement Company  None  
Order CPL Submit Date:

Select Lender Successor Language  
Lender Successor Language: Its successors and/or assigns, as their interest may appear

**Approved Attorney**  
Favorites: Archer & Greiner, P.C. (Nilufer DeScherer) - 700 A Search Favorite  
Approved Attorney: Archer & Greiner, P.C. Address 1: 700 Alexander Park  
Address 2: Suite 102 City: Princeton State: NEW JERSEY Zip: 08540

Close

(CONTINUED ON NEXT PAGE)



# USER GUIDE FOR STEWART TITLE GUARANTY COMPANY INTEGRATION 2.5

## STEP 3D- {selecting the radio button option of "Settlement Company"}:

Settlement Company window pops up;

- a) Click on [Search] for the Settlement Company or
- b) Chose from the Favorites from the dropdown list
- c) Order the CPL by clicking on [Order CPL]

The screenshot shows the 'Request CPL' window with the following details:

- Agency: StewartAccess Test Agency
- Location: StewartAccess Test Agency Inc - 1980 Post Oak Suite 800
- Branch: Include All Branches
- Loan #: 00311813841
- Loan Amount: \$300,000.00
- Covered Party: Lender
- Form: NJ Single Transaction CPL Lender, Purchaser, Lessee or I
- Lender Information: Franklin Templeton Bank & Trust, FSB, 3000 Leadenhall Road, Mount Laurel, NJ 08054
- Buyer/Borrower: Todd Franks, Gerry Franks
- Seller/Owner: Christine Perry, Parker Perry
- Radio buttons:  Secondary Agency,  Approved Attorney,  Settlement Company,  None
- Buttons: Order CPL, Submit Date: [Green box]
- Favorites: Sovereign Settlement Services, LLC - 4669 RT. 9 North, Howell, NJ 07331
- Search button: [Red box]
- Close button: [Bottom center]

## STEP 3E:

- a) "Order CPL" window comes up to confirm the Request has been processed
- b) The CPL document is saved and can be opened in the Docs tab.
- c) The CPL document can also be opened right from the "Request CPL" window by clicking on [View CPL]
- d) Click [Close] to exit

The screenshot shows the 'Request CPL' window with the following details:

- Agency: StewartAccess Test Agency
- Location: StewartAccess Test Agency Inc - 1980 Post Oak Suite 800
- Branch: Include All Branches
- Loan #: 00036168
- Loan Amount: \$300,000.00
- Covered Party: Lender
- Form: NJ Single Transaction CPL Lender, Purchaser, Lessee or I
- Lender Information: Franklin Templeton Bank & Trust, FSB, 3000 Leadenhall Road, Mount Laurel, NJ 08054
- Buttons: Void CPL, Submit Date: 5/7/2021, View CPL [Red box]
- Close button: [Bottom center, Red box]

(CONTINUED ON NEXT PAGE)

## STEP 4:

[**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**];

The screenshot shows the 'Request CPL' window. At the top, there are dropdown menus for Agency (StewartAccess Test Agency), Location (StewartAccess Test Agency Inc - 1980 Post Oak Suite 800), and Branch (Include All Branches). Below these are fields for Loan # (00036168), Loan Amount (\$300,000.00), Covered Party (Lender), and Form (NJ Single Transaction CPL Lender, Purchaser, Lessee or I). A 'Lender Information' section contains fields for Name (Franklin Templeton Bank & Trust, FSB), Address (3000 Leadenhall Road), City (Mount Laurel), State (NEW JERSEY), and Zip (08054). A 'Lender Successor Language' field contains the text 'Its successors and/or assigns, as their interest may appear'. At the bottom right, a 'Void CPL' button is highlighted with a red box. Other buttons include 'Submit Date: 5/7/2021' and 'View CPL'. A 'Close' button is at the bottom center.

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

The screenshot shows the 'Void CPL - 984304278' window. It has a 'Reason' section with four radio button options: 'Created in Error' (selected), 'Coverage Declined', 'Duplicate', and 'No longer applies'. At the bottom, a 'Void CPL' button is highlighted with a red box, and a 'Close' button is to its right.

"Void CPL" window come up to confirm the Request has been processed, Click [**OK**]

The screenshot shows the 'Void CPL - 988974995' window. It features an information icon and the text 'Request has been processed successfully'. An 'OK' button is located at the bottom center.

***Then follow steps 2 through 3 to generate a new CPL with the updated information***

(CONTINUED ON NEXT PAGE)



# USER GUIDE FOR STEWART TITLE GUARANTY COMPANY INTEGRATION 2.5

## HOW TO CREATE THE STEWART TITLE GUARANTY COMPANY – COMMITMENT JACKET IN SNAPCLOSE

### STEP 1 {GENERATING THE COMMITMENT JACKET}:

Click on the Commitment tab and click the button labeled [*Commitment*] at the bottom right-hand side of the window  
A Commitment Date must be entered to generate the Commitment Jacket

The screenshot shows the SnapClose software interface. At the top, there is a navigation bar with tabs: Profile, Orders & Reminders, Commitment, Invoice, CD, 1099, Disburse, E-Record, Policy, Docs, Notes, Tasks, Courier, Lender Exchange, and Title Order. The 'Commitment' tab is selected. Below the navigation bar, there is a form with fields for 'Fill Using', 'Commitment Date' (set to 05/07/2021), 'Time' (AM/PM), and 'Expiration Date'. There are also buttons for 'Email Alerts' and 'Create Document(s)'. At the bottom of the interface, there is a 'Show:' section with checkboxes for various document types: Vesting, Legal/Property Description, Requirements, Exceptions, Mortgages, Surveys, CPL, Commitment, Guarantee, and Binder. The 'Commitment' button is highlighted with a red box.

### STEP 2 {REQUEST COMMITMENT JACKET WINDOW APPEARS}:

Note; the signature that was entered in SnapClose, *see pages 3-5 for instructions*

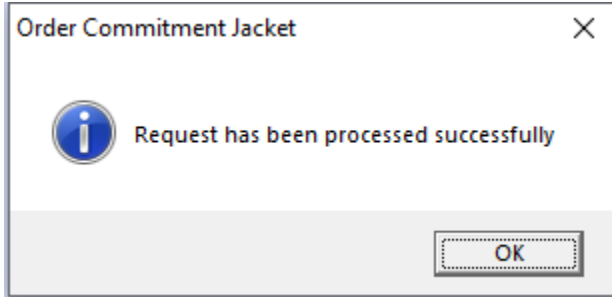
- Select the Agency from the dropdown list
- Select the Location from the dropdown list
- Select the Letter Type from the dropdown list
- If the signature was entered in SnapClose, it will automatically be entered
- If for any reason, you do not want the signature on the Commitment Jacket, you can press [Clear Signature]
- In the case where the signature was cleared, the signature can be added back by pressing [Add Signature]
- Press [Order Commitment Jacket] button to order and generate the document

The screenshot shows the 'Commitment Jacket' window. It has a title bar with a close button. Below the title bar, there are three dropdown menus: 'Agency' (StewartAccess Test Agency), 'Location' (StewartAccess Test Agency - 1980 Post Oak Suite 800), and 'Letter Type' (ALTA Commitment 8-1-2016). Below these is a large text area containing a signature 'Philip McNu'. To the right of the signature are two buttons: 'Add Signature' and 'Clear Signature'. At the bottom of the window, there is a button labeled 'Order Commitment Jacket' which is highlighted with a red box, and a 'Submit Date' field. A 'Close' button is located at the very bottom of the window.

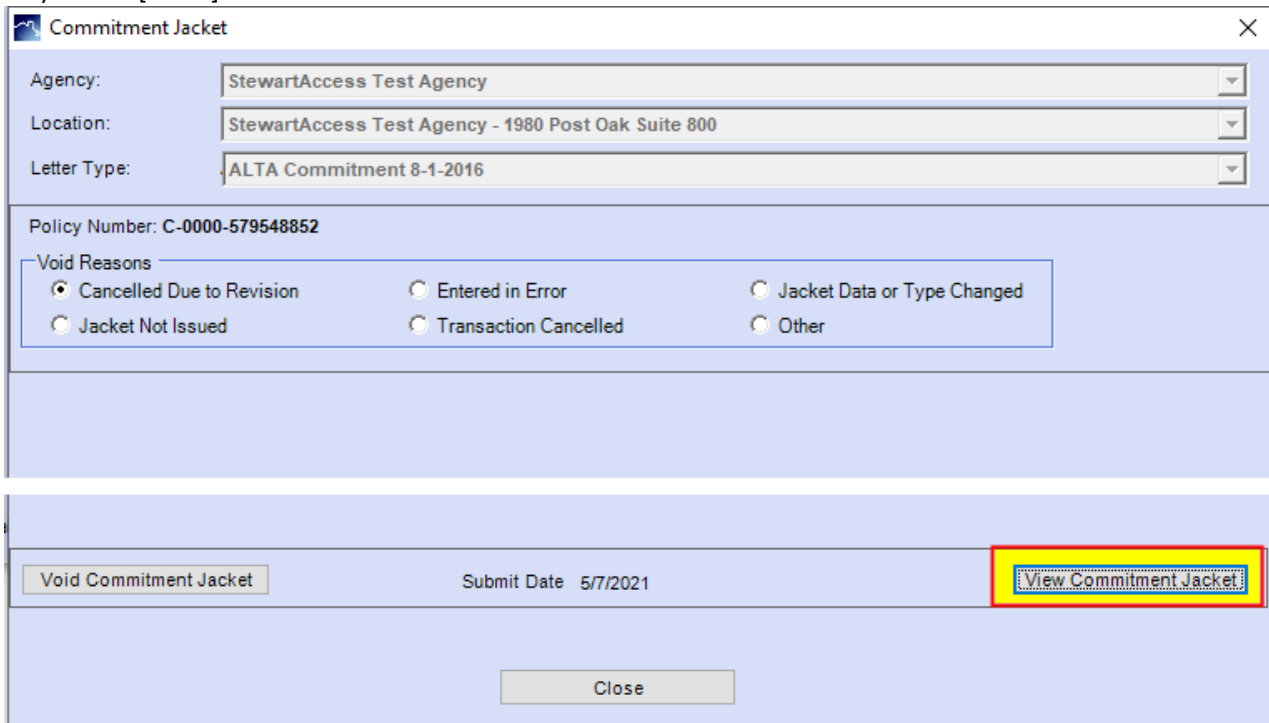
(CONTINUED ON NEXT PAGE)

### STEP 3 {GENERATED COMMITMENT JACKET WINDOW}:

"*Order Commitment Jacket*" window comes up to confirm the Request has been processed, Click [OK]



- a) The Commitment Jacket document is saved and can be opened in the Docs tab.
- b) The Commitment Jacket document can also be opened right from the "Request Commitment Jacket " window or by clicking on [View Commitment Jacket]
- c) Click [Close] to exit

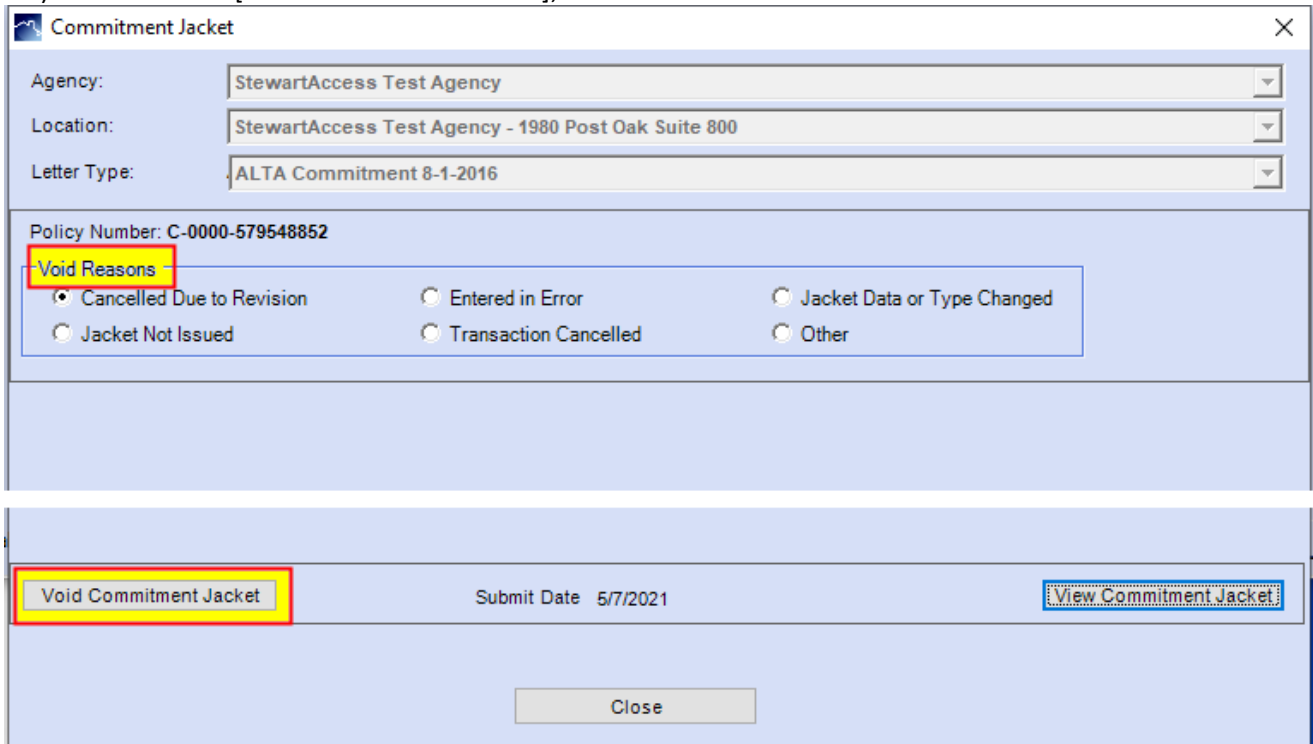


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**STEP 4:**

[**Void Commitment Jacket**] button

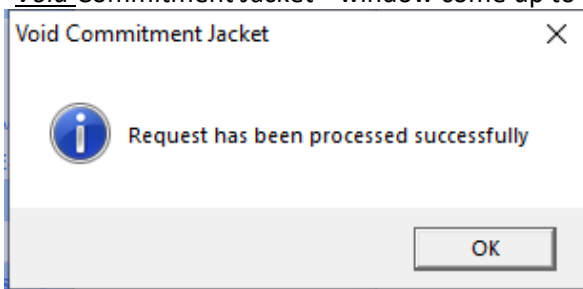
- a) If you need to make any changes to the Commitment Jacket, and after you make the change(s) in the file
- b) then open the [Commitment Jacket], click one of the "Void Reasons" radio button that would apply to the void
- c) then click on [Void Commitment Jacket];



The screenshot shows a window titled "Commitment Jacket" with a close button (X) in the top right corner. The window contains the following fields and options:

- Agency: StewartAccess Test Agency
- Location: StewartAccess Test Agency - 1980 Post Oak Suite 800
- Letter Type: ALTA Commitment 8-1-2016
- Policy Number: C-0000-579548852
- Void Reasons section with six radio buttons:
  - Cancelled Due to Revision
  - Entered in Error
  - Jacket Data or Type Changed
  - Jacket Not Issued
  - Transaction Cancelled
  - Other
- Buttons at the bottom:
  - Void Commitment Jacket (highlighted with a red and yellow border)
  - Submit Date 5/7/2021
  - View Commitment Jacket (dotted border)
  - Close

"Void Commitment Jacket " window come up to confirm the Request has been processed, Click [OK]



The screenshot shows a small window titled "Void Commitment Jacket" with a close button (X) in the top right corner. The window contains the following information:

- An information icon (i) followed by the text: Request has been processed successfully
- An OK button at the bottom right.

(CONTINUED ON NEXT PAGE)



# USER GUIDE FOR STEWART TITLE GUARANTY COMPANY INTEGRATION 2.5

## HOW TO CREATE THE STEWART TITLE GUARANTY COMPANY – GUARANTEE JACKET IN SNAPCLOSE

### STEP 1 {GENERATING THE GUARANTEE JACKET}:

Click on the Guarantee tab and click the button labeled [*Guarantee*] at the bottom right-hand side of the window  
A Commitment Date must be entered to generate the Guarantee Jacket

The screenshot shows the SnapClose application interface. The 'Commitment' tab is selected and highlighted in yellow. Below the tabs, the 'Commitment Date' field is set to '05/07/2021' and is also highlighted in yellow. At the bottom of the interface, the 'Guarantee' button is highlighted in yellow.

### STEP 2 {REQUEST GUARANTEE JACKET WINDOW APPEARS}:

Note; the signature that was entered in SnapClose, *see pages 3-5 for instructions*

- Select the Agency from the dropdown list
- Select the Location from the dropdown list
- Select the Letter Type from the dropdown list
- Guarantee Jackets are State specific and each state may have additional information requested
- Note any label in red font color are mandatory fields and must have a value entered
- If the signature was entered in SnapClose, it will automatically be entered
- If for any reason, you do not want the signature on the Guarantee Jacket, you can press [Clear Signature]
- In the case where the signature was cleared, the signature can be added back by pressing [Add Signature]
- Press [Order Guarantee Jacket] button to order and generate the document

The screenshot shows the 'Guarantee Jacket' window. The 'Agency' is 'StewartAccess Test Agency', 'Location' is 'StewartAccess Test Agency Inc - 1980 Post Oak Suite 800', and 'Letter Type' is 'Ohio Final Judicial Report (Rev. 10/15/2004)'. The 'Liability' is '\$200,000.00', 'Actual Premium' is '\$1,000.00', and 'Actual Remittance' is '\$100.00'. The 'Search Date' is '05/07/2021'. A signature 'Philip McN...' is visible. At the bottom, the 'Order Guarantee Jacket' button is highlighted in yellow.

Endorsements	Premium	Remittance
<input type="checkbox"/> General Endorsement	\$0.00	\$0.00
<input type="checkbox"/> OH Final Judicial Report	\$0.00	\$0.00
<input type="checkbox"/> OH Preliminary Judicial Report Extended Coverage Rev 4-15-2010	\$0.00	\$0.00

(CONTINUED ON NEXT PAGE)

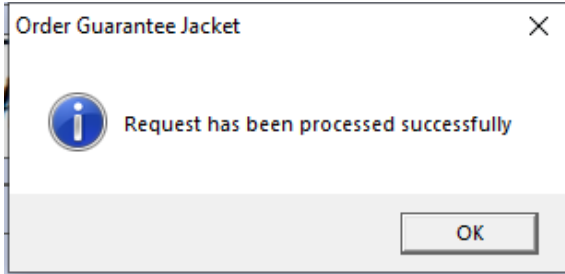




# USER GUIDE FOR STEWART TITLE GUARANTY COMPANY INTEGRATION 2.5

### STEP 3 {GENERATED GUARANTEE JACKET WINDOW}:

"Order Guarantee Jacket" window comes up to confirm the Request has been processed, Click [OK]



- a) The Guarantee Jacket document is saved and can be opened in the Docs tab.
- b) The Guarantee Jacket document can also be opened right from the "Request Guarantee Jacket " window or by clicking on [View Guarantee Jacket]
- c) Click [Close] to exit

(CONTINUED ON NEXT PAGE)

**STEP 4:**

[**Void Guarantee Jacket**] button

- a) If you need to make any changes to the Guarantee Jacket, and after you make the change(s) in the file
- b) then open the [Guarantee Jacket], click on one of the "Void Reasons" radio button that would apply to the void
- c) then click on [Void Guarantee Jacket];

"Void Guarantee Jacket " window come up to confirm the Request has been processed, Click [OK]

(CONTINUED ON NEXT PAGE)



# USER GUIDE FOR STEWART TITLE GUARANTY COMPANY INTEGRATION 2.5

## HOW TO CREATE THE STEWART TITLE GUARANTY COMPANY – BINDER JACKET IN SNAPCLOSE

### STEP 1 {GENERATING THE BINDER JACKET}:

Click on the Binder tab and click the button labeled [*Binder*] at the bottom right-hand side of the window  
A Commitment Date must be entered to generate the Binder Jacket

The screenshot shows the SnapClose application interface. The 'Commitment' tab is selected in the top navigation bar. Below the navigation bar, there are several input fields: 'Fill Using' (dropdown), 'Commitment Date' (calendar icon, value: 05/07/2021), 'Time' (radio buttons for AM/PM), 'Expiration Date' (calendar icon), 'Email Alerts' (checkbox), and 'Create Document(s)' (button). At the bottom of the interface, there is a 'Show:' section with several checkboxes (Vesting, Legal/Property Description, Requirements, Exceptions, Mortgages, Surveys) and a 'CPL' dropdown. The 'Commitment', 'Guarantee', and 'Binder' buttons are visible, with the 'Binder' button highlighted with a red box.

### STEP 2 {REQUEST BINDER JACKET WINDOW APPEARS}:

Note; the signature that was entered in SnapClose, *see pages 3-5 for instructions*

- Select the Agency from the dropdown list
- Select the Location from the dropdown list
- Select the Letter Type from the dropdown list
- Binder Jackets are State specific and each state may have additional information requested
- Note any label in red font color are mandatory fields and must have a value entered
- If the signature was entered in SnapClose, it will automatically be entered
- If for any reason, you do not want the signature on the Binder Jacket, you can press [Clear Signature]
- In the case where the signature was cleared, the signature can be added back by pressing [Add Signature]
- Press [Order Binder Jacket] button to order and generate the document

The screenshot shows the 'Binder Jacket' window. It contains the following fields and elements:

- Agency: StewartAccess Test Agency (dropdown)
- Location: StewartAccess Test Agency - 1980 Post Oak Suite 800 (dropdown)
- Letter Type: CLTA Interim Binder 11-4-16 (dropdown)
- Liability: \$333,000.00
- Actual Premium: \$1,000.00 (red text)
- Actual Remittance: \$100.00 (red text)
- Interim Binder To: [text input]
- Interim Binder Type of Policy: [text input]
- Interim Binder Number of Days: [text input]
- Interim Binder Endorsements to Issue: [text input]
- Signature: Philip McNu (handwritten signature)
- Add Signature (button)
- Clear Signature (button)
- Endorsements table:
 

Endorsements	Premium	Remittance
<input checked="" type="checkbox"/> CLTA Interim Binder Extension	\$0.00	\$0.00
- Order Binder Jacket (button, highlighted with a red box)
- Submit Date (text input)
- Close (button)

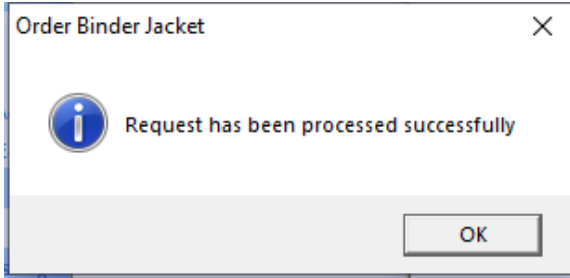
(CONTINUED ON NEXT PAGE)



# USER GUIDE FOR STEWART TITLE GUARANTY COMPANY INTEGRATION 2.5

### STEP 3 {GENERATED BINDER JACKET WINDOW}:

"*Order Binder Jacket*" window comes up to confirm the Request has been processed, Click [OK]



- a) The Binder Jacket document is saved and can be opened in the Docs tab.
- b) The Binder Jacket document can also be opened right from the "Request Binder Jacket " window or by clicking on [View Binder Jacket]
- c) Click [Close] to exit

Agency: StewartAccess Test Agency

Location: StewartAccess Test Agency - 1980 Post Oak Suite 800

Letter Type: CLTA Interim Binder 11-4-16

Liability: \$333,000.00    Actual Premium: \$1,000.00    Actual Remittance: \$100.00

Interim Binder To: \_\_\_\_\_

Interim Binder Type of Policy: \_\_\_\_\_

Interim Binder Number of Days: \_\_\_\_\_

Interim Binder Endorsements to Issue: \_\_\_\_\_

Policy Number: B-0000-579573071

Void Reasons

Canceled Due to Revision     Entered in Error     Jacket Data or Type Changed

Jacket Not Issued     Transaction Cancelled     Other

Submit Date 5/7/2021

Void Binder Jacket    View Binder Jacket    Close

(CONTINUED ON NEXT PAGE)

**STEP 4:**

[**Void Binder Jacket**] button

- a) If you need to make any changes to the Binder Jacket, and after you make the change(s) in the file
- b) then open the [Binder Jacket], click on one of the "Void Reasons" radio button that would apply to the void
- c) then click on [Void Binder Jacket];

Agency: StewartAccess Test Agency  
Location: StewartAccess Test Agency - 1980 Post Oak Suite 800  
Letter Type: CLTA Interim Binder 11-4-16

Liability: \$333,000.00    Actual Premium: \$1,000.00    Actual Remittance: \$100.00

Interim Binder To: \_\_\_\_\_  
Interim Binder Type of Policy: \_\_\_\_\_  
Interim Binder Number of Days: \_\_\_\_\_  
Interim Binder Endorsements to Issue: \_\_\_\_\_

Policy Number: B-0000-579573071

**Void Reasons**

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

Void Binder Jacket    Submit Date 5/7/2021    View Binder Jacket

Close

"Void Binder Jacket " window come up to confirm the Request has been processed, Click [OK]

Void Binder Jacket

**i** Request has been processed successfully

OK

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## USER GUIDE FOR STEWART TITLE GUARANTY COMPANY INTEGRATION 2.5

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# USER GUIDE FOR STEWART TITLE GUARANTY COMPANY INTEGRATION 2.5

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

### Generating Policy Jackets require a Closing Date to be entered on the Profile Tab

Closing Information  
 Closing Date: 05/07/2021 09:00 AM  
 Closer: Gimello, Chris  
 Notary: Koehl, Wayne  
 Examiner: DeCord, Joseph  
 Closing Place: None  
 Closing Completed

### 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 Agency  
 Location: StewartAccess Test Agency Inc - 1980 Post Oak Suite  
 OK Cancel

- c) "Owner Policy" section is at the top
- d) "Loan Policy" is the section below (Note; if multiple Lenders on the file they will also be entered)
- e) The Policy window will show the [Policy #] which will automatically populate with the Policy Jacket number issued on the ordered Jacket
- f) Insured parties are shown on the window also

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

Owner Policy:  
 Amount \$500,000.00  
 Policy # [Yellow]  
 Effective Date [Dropdown]  
 Document Date [Dropdown]  
 Recorded Date [Dropdown]  
 Policy Jacket Type [Dropdown]  
 Order Jacket [Input]  
 Deed From Scott D Greene and Jeanie A Greene, husband and wife  
 Issued To Linda L Greene and James P Greene, wife and husband  
 Book Type (None)  
 Book [Input] Page [Input] Instrument # [Input]  
 Submit Date [Input]

Loan Policies:  
 Type [Dropdown] Lender K Hovnanian American Mortgage, LLC Amount \$300,000.00 Policy# [Input]  
 Primary [Checked]  
 Policy # [Yellow] Mortgage From Linda L Greene and James P Greene, wife and husband  
 Effective Date [Dropdown] Book Type (None)  
 Document Date [Dropdown] Book [Input] Page [Input] Instrument # [Input]  
 Recorded Date [Dropdown] Submit Date [Input]  
 Policy Jacket Type [Dropdown] Order Jacket [Input]

(CONTINUED ON NEXT PAGE)



# USER GUIDE FOR STEWART TITLE GUARANTY COMPANY INTEGRATION 2.5

## NEW FEATURE ADDED FOR ORDERING POLICY JACKETS SIMULTANEOUSLY INCLUDING POLICY JACKET REVISIONS

### ADDED SIMULTANEOUS WINDOW AT THE BOTTOM OF THE POLICY TAB

- a) Ability to order All Policy Jackets Simultaneously by selecting the policy jackets description from the dropdown list
- b) Revise Policy Jackets
- c) Void Policy Jackets

Simultaneous:

**Request Policy Jacket** X

**Owner** K Hovnanian American Mortgage, LLC

---

Policy Jacket Type: **ALTA Loan Policy - FL - 6-17-2006** Policy #

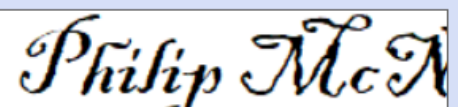
Policy Amount: 
Actual Premium: 
Effective Date:

Actual Remittance:

---

Successor Language:  
 None  
 Special Charges  
 Additional Charges

Clause:  
 Simultaneous  
 Refinance/Reissue



Endorsements	Premium	Remittance
<input checked="" type="checkbox"/> ALTA 4.1 Condo (Loan)	<input type="text" value="\$25.00"/>	<input type="text" value="\$7.50"/>
<input checked="" type="checkbox"/> ALTA 5.1 Planned Unit Development (Loan)	<input type="text" value="\$25.00"/>	<input type="text" value="\$7.50"/>
<input checked="" type="checkbox"/> ALTA 8.1-06 Environmental Protection Lien	<input type="text" value="\$25.00"/>	<input type="text" value="\$7.50"/>
<input checked="" type="checkbox"/> Endorsement Florida Form 9 [LP]	<input type="text" value="\$260.00"/>	<input type="text" value="\$78.00"/>

(CONTINUED ON NEXT PAGE)





# USER GUIDE FOR STEWART TITLE GUARANTY COMPANY INTEGRATION 2.5

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

### STEP 1:

- a) 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.
- b) \*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 and values:

Amount	\$500,000.00	Deed From	Scott D Greene and Jeanie A Greene, husband and wife
Policy #		Issued To	Linda L Greene and James P Greene, wife and husband
Effective Date		Book Type	(None)
Document Date		Book	
Recorded Date		Page	
Policy Jacket Type		Instrument #	

The 'Policy Jacket Type' dropdown menu is open, showing the following options:

- (None)
- ALTA Owners Policy - FL - 6-17-2006
- ALTA U. S. Policy 12-3-2012

### STEP 2:

- a) Optional entry of Recorded Date for entering the policy jacket date. Recorded Date is the default and the user has the ability to choose either the Closing Date or leave the Recording Date. If the Recording Date is not entered, then the Policy Date will default to the Closing Date.
- a) After selecting the appropriate Owner's "Policy Jacket Type", Click on [Order Jacket] button
- b) \*Note, after choosing the Owner's & Loan Policy jackets from the dropdown lists, the following windows will show when ordering the Policy Jackets from the New Simultaneous Window At The Bottom Of The Policy Tab

The screenshot shows the 'Owner Policy' form with the following fields and values:

Amount	\$500,000.00	Deed From	Scott D Greene and Jeanie A Greene, husband and wife
Policy #		Issued To	Linda L Greene and James P Greene, wife and husband
Effective Date		Book Type	(None)
Document Date		Book	
Recorded Date	05/07/2021	Page	
Policy Jacket Type	ALTA Owners Policy - FL - 6-17-2006	Instrument #	

The 'Order Jacket' button is highlighted with a red box.

(CONTINUED ON NEXT PAGE)



# USER GUIDE FOR STEWART TITLE GUARANTY COMPANY INTEGRATION 2.5

### STEP 3:

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.)

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

- a) [Policy Amount:] – mandatory field will be populated with the Purchase Price of the file
- b) [Actual Premium:] – mandatory field will be populated automatically\*  
\*Note; the Actual Premium is calculated on the Invoice tab and the premium amount is entered in this field. The Actual Premium field can be edited, if necessary.
- 3) [Actual Remittance:] – mandatory field will be populated automatically\*  
\*Note; the remittance is calculated and the remittance amount is entered in this field.  
The Actual Remittance field can be edited, if necessary.
- 4) [Effective Date:] – mandatory field will be defaulted with the Recorded Date and if not the Closing Date is populated and can be changed by clicking on the Recorded Date dropdown.  
\*Note if necessary; the Effective Date can be changed manually or click on the [Effective Date:] calendar drop-down to chose the date

### OWNER POLICY REQUEST POLICY JACKET WINDOW

Request Policy Jacket

Owner

Policy Jacket Type: T-1 Owners Policy of Title Insurance 1-3-2014 Policy #

Policy Amount: \$500,000.00 Actual Premium: \$2,940.00 Effective Date: 05/07/2021 Recorded Date

Actual Remittance: \$882.00

Transaction Code: Select Transaction Code

None  
 Special Charges  
 Additional Charges  
 Simultaneous  
 Refinance/Reissue

Philip McA

Add Signature Clear Signature

Endorsements	Premium	Remittance
<input checked="" type="checkbox"/> T-26 - Additional Insured	\$294.00	\$88.20
<input checked="" type="checkbox"/> T-3 - Completion of Improvements		

Order Policy Jacket Close

(CONTINUED ON NEXT PAGE)



# USER GUIDE FOR STEWART TITLE GUARANTY COMPANY INTEGRATION 2.5

## STEP 4:

Next section is state dependent and may have more information requested, e.g. Texas has a selection for policy Transaction Code where Florida and New Jersey do not.

- a) [Transaction Code:] – mandatory field to be populated by the user from the dropdown list

- b) [None, Special Charges\*, Additional Charges\*] – radio button selection to be selected when applicable  
\*Note; when Special Charges or Additional Charges is selected, additional OP section will open at the bottom of the window and use the scroll bar down to view

- 1) [Actual Premium:] – mandatory field that is populated by the agent
- 2) [Actual Remittance:] – mandatory field that is populated by the agent
- 3) [Transaction Code:] – mandatory field that is populated by selecting from the dropdown list

- c) [Simultaneous] – checkbox will be populated automatically when the file's transaction is set to Purchase\*  
\*Note; this checkbox may be unchecked as necessary
- d) [Refinance/Reissue] – checkbox will be populated automatically when the file's transaction is set to Refinance and in the case of the Owner's Policy the Reissue (*Original Policy*) information may apply but not mandatory
  - 1) [Policy #] – Original Policy Number entered; not a mandatory field
  - 2) [Liability] – Original Policy Liability entered; not a mandatory field
  - 3) [Effective Date] – Original Policy Effective Date entered; not a mandatory field
  - 4) [Underwriter] – mandatory field, underwriter is selected from the dropdown list
  - 5) [Form Type] – mandatory field, form type is selected from the dropdown list

- e) Signature will be set as entered in the User section (\*see pages 3-5 in this manual to add the signature)

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# USER GUIDE FOR STEWART TITLE GUARANTY COMPANY INTEGRATION 2.5

## STEP 5 - ENDORSEMENTS:

- a) [Endorsements] – All Owner's Policy endorsements included in SnapClose will automatically be listed
- b) Endorsements that are entered on the Invoice Tab as Line Item Charges will automatically be checked and enter the Endorsement Premium and Remittance amounts
- c) Agent may scroll the list of endorsements and manually check the appropriate Endorsement and manually enter the Endorsement Premium and Remittance

Endorsements	Premium	Remittance
<input checked="" type="checkbox"/> ALTA 16-06 Mezzanine Financing	\$680.00	\$102.00
<input checked="" type="checkbox"/> ALTA 3.1-06 Zoning (Owner's)	\$453.20	\$67.98
<input type="checkbox"/> ALTA 7-06 Manufactured Housing Unit (Owner's)	\$0.00	\$0.00
<input type="checkbox"/> NJ Arbitration Endorsement	\$0.00	\$0.00

## STEP 6 – ORDER POLICY JACKET:

- a) Press [Order Policy Jacket] button
- b) In the event that STG cannot match the SnapClose endorsement; an Additional Information box will appear to have the agent select the answer(s) to match the SnapClose endorsement to STG endorsement

Endorsements	Premium	Remittance
<input checked="" type="checkbox"/> T-26 - Additional Insured	\$294.00	\$88.20
<input checked="" type="checkbox"/> T-3 - Completion of Improvements		

Additional information is needed for this order. Please answer the following questions:

T-26 Additional Insured    0893-Additional Insured Endorsement

T-3 Assignment of Lien    0893-Additional Insured Endorsement  
 0890-Access Endorsement  
 0501-Amendment of Survey Exception for T-1R  
 0500-Amendment of Survey Exception for T-1  
 0010-Charge for Additional Chains of Title  
 0896-Co-Insurance  
 0550-Completion of Improvements and Survey  
 0806-Contiguity Endorsement

Actual Premium: \$1,000.00    Actual Remittance: \$30.00    Transaction Code: (8042) Commitment issued to F.D.I.C. and O.T.S.Commitment to

Actual Premium:    Actual Remittance:    Transaction Code: Select Transaction Code

Actual Premium:    Actual Remittance:    Transaction Code: Select Transaction Code

Order Policy Jacket    Close

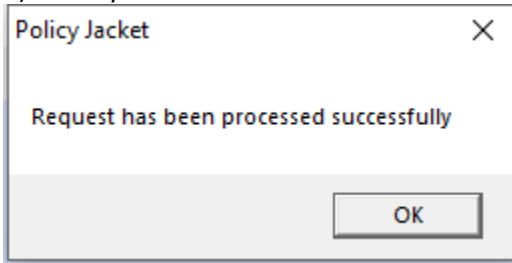
- c) After selecting the correct response, press [Order Policy Jacket] button

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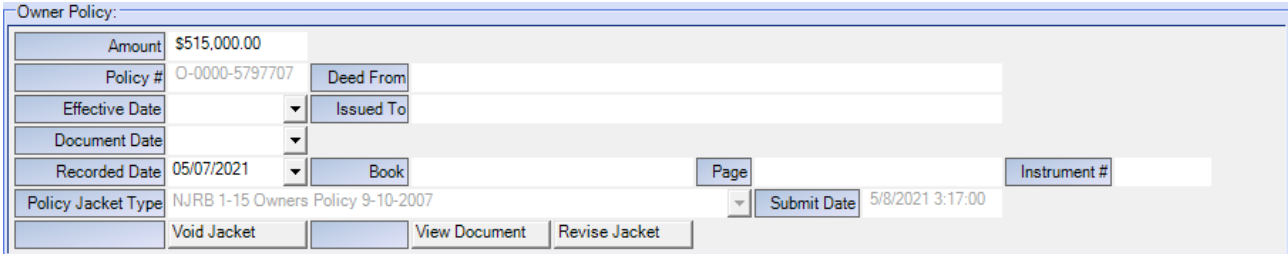
# USER GUIDE FOR STEWART TITLE GUARANTY COMPANY INTEGRATION 2.5

d) Policy Jacket confirmation window will pop up and press OK to complete

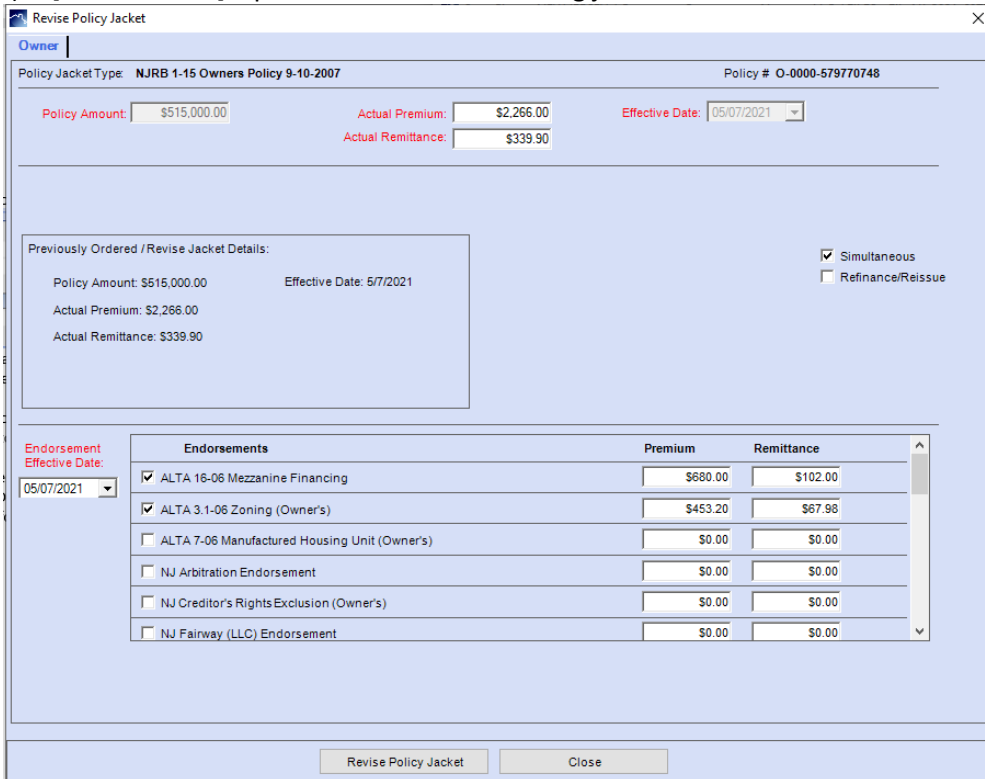


## STEP 7 – COMPLETED ORDER POLICY JACKET:

When the Owner's Policy Jacket has been generated, the following options are available



- a) Owner's Policy # is populated automatically and be disabled
- b) Policy Jacket Type selected will populate and be disabled
- c) Submit Date and Time will populate and be disabled
- d) [Void Jacket] – press this to Void the policy and reset to order a new policy jacket  
Note, the Void Policy Jacket – Void Reasons will show to have the reason be selected, then press [Void Policy Jacket] button to complete
- e) [View Jacket] – press to open the Policy Jacket document  
Note, the Policy Jacket document is also saved to the Docs tab
- f) [Revise Jacket] – press to revised the existing jacket information



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# USER GUIDE FOR STEWART TITLE GUARANTY COMPANY INTEGRATION 2.5

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

### STEP 1:

- a) In the Loan Policy section, click on the drop-down arrow in the field labeled [Policy Jacket Type] and choose the Loan's Policy Jacket for which is applicable to the file.
- b) \*Note, the list of Loan 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 'Loan Policies' form. At the top, there is a table with columns: Type, Lender, Amount, and Policy#. Below this, there are several input fields: Policy #, Mortgage From (Linda L Greene and James P Greene, wife and husband), Effective Date, Book Type (None), Document Date, Recorded Date, Book, Page, Instrument #, Policy Jacket Type (ALTA Loan Policy - FL - 6-17-2006), and Submit Date. A red box highlights the dropdown arrow next to the Policy Jacket Type field, which is open to show a list of options: (None), ALTA Short Form Residential Loan Policy - FL - 6-17-2006, ALTA Loan Policy - FL - 6-17-2006, and ALTA Residential Limited Coverage Mortgage Modification Policy 12-1-2014 - FL.

### STEP 2:

- a) Optional entry of Recorded Date for entering the policy jacket date. Recorded Date is the default and the user has the ability to choose either the Closing Date or leave the Recording Date. If the Recording Date is not entered, then the Policy Date will default to the Closing Date.
- a) After selecting the appropriate Loan "Policy Jacket Type", Click on [Order Jacket] button
- b) \*Note, after choosing the Owner's & Loan Policy jackets from the dropdown lists, the following windows will show when ordering the Policy Jackets from the New Simultaneous Window At The Bottom Of The Policy Tab

The screenshot shows the 'Loan Policies' form with the Recorded Date field populated with '05/07/2021'. The Policy Jacket Type dropdown is now closed. A red box highlights the 'Order Jacket' button located below the Policy Jacket Type field.

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# USER GUIDE FOR STEWART TITLE GUARANTY COMPANY INTEGRATION 2.5

### STEP 3:

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.)

"Request Policy Jacket" window shows the Loan's Policy fields to be completed:

- a) [Policy Amount:] – mandatory field will be populated with the Loan Liability Amount of the file
- b) [Actual Premium:] – mandatory field will be populated automatically\*  
\*Note; the Actual Premium is calculated on the Invoice tab and the premium amount is entered in this field. The Actual Premium field can be edited, if necessary.
- 3) [Actual Remittance:] – mandatory field will be populated automatically\*  
\*Note; the remittance is calculated and the remittance amount is entered in this field.  
The Actual Remittance field can be edited, if necessary.
- 4) [Effective Date:] – mandatory field will be defaulted with the Recorded Date and if not the Closing Date is populated and can be changed by clicking on the Recorded Date dropdown.  
\*Note if necessary; the Effective Date can be changed manually or click on the [Effective Date:] calendar drop-down to chose the date

### LOAN POLICY REQUEST POLICY JACKET WINDOW

The screenshot shows the "Request Policy Jacket" window with the following fields and options:

- Policy Jacket Type:** T-2 Loan Policy of Title Insurance 1-3-2014
- Policy #:** (empty)
- Policy Amount:** \$300,000.00
- Actual Premium:** \$100.00
- Actual Remittance:** \$30.00
- Effective Date:** 05/07/2021
- Closing Date:** (dropdown)
- Transaction Code:** Select Transaction Code
- Successor Language:** Select Successor Language
- Clause:** Its successors and/or assigns, as their interests may appear
- Charges:**
  - None
  - Special Charges
  - Additional Charges
  - Simultaneous
  - Refinance/Reissue
- Signature:** Philip McN (with "Add Signature" and "Clear Signature" buttons)
- Endorsements Table:**

Endorsements	Premium	Remittance
<input checked="" type="checkbox"/> T-17 - Planned Unit Development	\$25.00	\$7.50
<input checked="" type="checkbox"/> T-31 - Manufactured Housing	\$20.00	\$6.00
- Buttons:** Order Policy Jacket, Close

(CONTINUED ON NEXT PAGE)





# USER GUIDE FOR STEWART TITLE GUARANTY COMPANY INTEGRATION 2.5

## STEP 4:

Next section is state dependent and may have more information requested, e.g. Texas has a selection for policy Transaction Code where Florida and New Jersey do not.

- a) [Transaction Code:] – mandatory field to be populated by the user from the dropdown list

- b) [None, Special Charges\*, Additional Charges\*] – radio button selection to be selected when applicable  
\*Note; when Special Charges or Additional Charges is selected, additional LP section will open at the bottom of the window and use the scroll bar down to view
  - 1) [Actual Premium:] – mandatory field that is populated by the agent
  - 2) [Actual Remittance:] – mandatory field that is populated by the agent
  - 3) [Transaction Code:] – mandatory field that is populated by selecting from the dropdown list

- c) [Simultaneous] – checkbox will be populated automatically when the file's transaction is set to Purchase\*  
\*Note; this checkbox may be unchecked as necessary
- d) [Refinance/Reissue] – checkbox will be populated automatically when the file's transaction is set to Refinance and in the case of the Loan Policy the Reissue (*Original Policy*) information may apply but not mandatory
  - 1) [Policy #] – Original Policy Number entered; not a mandatory field
  - 2) [Liability] – Original Policy Liability entered; not a mandatory field
  - 3) [Effective Date] – Original Policy Effective Date entered; not a mandatory field
  - 4) [Underwriter] – mandatory field, underwriter is selected from the dropdown list
  - 5) [Form Type] – mandatory field, form type is selected from the dropdown list

- e) Lender Successor Language Clause will be entered on the Profile tab but may be chosen from the "Select Successor Language" dropdown list or may be manually entered
- f) Signature will be set as entered in the User section (\*see pages 3-5 in this manual to add the signature)

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# USER GUIDE FOR STEWART TITLE GUARANTY COMPANY INTEGRATION 2.5

## STEP 5 - ENDORSEMENTS:

- a) [Endorsements] – All Loan Policy endorsements included in SnapClose will automatically be listed
- b) Endorsements that are entered on the Invoice Tab as Line Item Charges will automatically be checked and enter the Endorsement Premium and Remittance amounts
- c) Agent may scroll the list of endorsements and manually check the appropriate Endorsement and manually enter the Endorsement Premium and Remittance

Endorsements	Premium	Remittance
<input checked="" type="checkbox"/> T-17 - Planned Unit Development	\$25.00	\$7.50
<input checked="" type="checkbox"/> T-31 - Manufactured Housing	\$20.00	\$6.00

## STEP 6 – ORDER POLICY JACKET:

- a) Press [Order Policy Jacket] button
- b) In the event that STG cannot match the SnapClose endorsement; an Additional Information box will appear to have the agent select the answer(s) to match the SnapClose endorsement to STG endorsement

Endorsements	Premium	Remittance
<input checked="" type="checkbox"/> T-17 - Planned Unit Development	\$25.00	\$7.50
<input checked="" type="checkbox"/> T-31 - Manufactured Housing	\$20.00	\$6.00

Additional information is needed for this order. Please answer the following questions:

T-17 Planned Unit Development	<input type="text" value="0884-Planned Unit Development Endorsement"/>
T-31 Manufactured Housing	<input type="text" value="015 0884-Planned Unit Development Endorsement"/>

0887-Planned Unit Development Endorsement issued on two or more policies issued simultaneous o  
 0890-Access Endorsement  
 0893-Additional Insured Endorsement  
 0500-Amendment of Survey Exception for T-1  
 0700-Amendment of Tax Exception  
 700-Amendment of Tax Exception

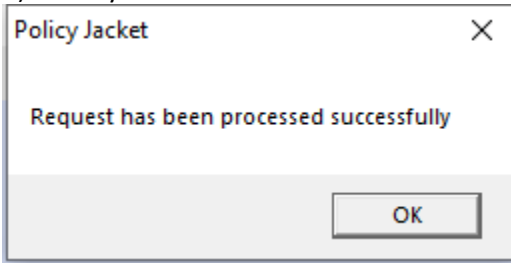
- c) After selecting the correct response, press [Order Policy Jacket] button

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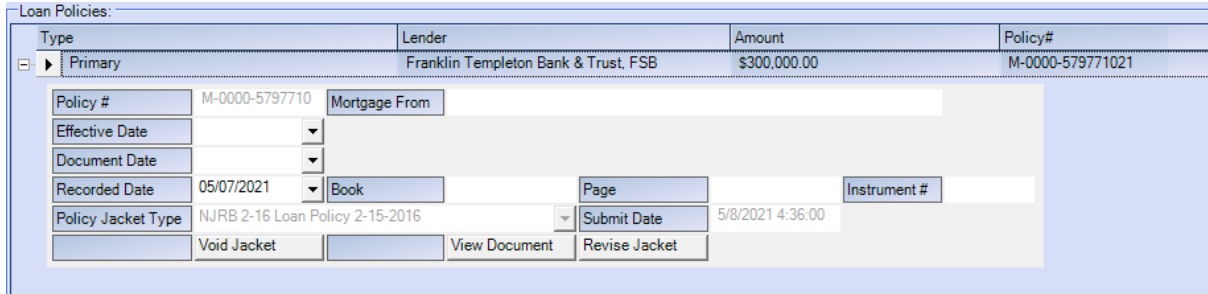
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d) Policy Jacket confirmation window will pop up and press OK to complete



### STEP 7 – COMPLETED ORDER POLICY JACKET:

When the Loan Policy Jacket has been generated, the following options are available



- a) Loan Policy # is populated automatically and be disabled
- b) Policy Jacket Type selected will populate and be disabled
- c) Submit Date and Time will populate and be disabled
- d) [Void Jacket] – press this to Void the policy and reset to order a new policy jacket  
Note, the Void Policy Jacket – Void Reasons will show to have the reason be selected, then press [Void Policy Jacket] button to complete
- e) [View Jacket] – press to open the Policy Jacket document  
Note, the Policy Jacket document is also saved to the Docs tab
- f) [Revise Jacket] – press to revised the existing jacket information

