




Stewart Access – AIM+ CPL

Quick Reference Card


Create CPL

To create a Closing Protection Letter within AIM+, use the following steps:

Steps

1. After creating an order, click the **CPL Data Entry Group**.
2. Click **Create New CPL**. 

15053007 : Closing Protection Letter
Closing Protection Letter



CPL Order

Issuing Agency
 Alyeska Title Guaranty Agency, Inc.

CPL Date	CPL Number	Status	Covered Party	Lender	Buyer	Seller
8/25/2015	179527935	Void	Lender	Wells Fargo	Armand Brown	
9/13/2015 11:...		Draft				

CPL Date * 09/13/2015 State * AK Alaska Location * Lender Covered Party *

Form * Location Group Serial Number Status Draft Void Date

Data Entry Groups

- Order
- Properties
- Parties
- Title Charges
- Policies
- Documents
- Closing
- 1099-S
- Disbursements
- File Notes
- CPL**
- Credit Distribution
- Split Calculations
- Revenue Reporter



Note – All Buyer/Borrower, Seller, and Lender parties, as well as all properties are populated from the order.

3. Enter the **CPL Date**. This date cannot be more than 7 days from the current date.
4. Select the **Location**. This field may be auto-populated from Order Entry.
5. Select the **Covered Party**. Choose from, **Lender**, **Buyer/Borrower**, or **Seller**.



Note – The default is **Lender**.

6. Select the **Form** to be used from the picklist. Only forms specific to the Agency state will be shown.



Note – Since many of the CPL fields populate from the order; be sure to review the information for accuracy. This example demonstrates adding a Lender. The same steps are used to add Buyers and Sellers to the CPL




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7. Click the **Lender** tab.

The screenshot shows the 'Lender' tab interface. At the top, there is a navigation bar with a '1 of 1' indicator, a refresh icon, a delete icon, a currency icon, an 'Include' checkbox (highlighted with a red box), a 'Primary Lender' checkbox, and a 'Search' button. Below this are several input fields for lender information:

- Name *: Wells Fargo
- Address *: 123 Main St
- Attention To: [Empty]
- Branch: [Empty]
- Loan Number: 162158790
- City *: Houston
- Postal Code *: 77056
- State/Province *: TX, Texas
- County: [Empty]
- Country *: US, United States of America
- Phone: (555)555-5555
- Fax: [Empty]
- Email: [Empty]
- Successor Language: [Empty]
- Include Successor: [Empty]

8. Click the **Include** check box to add the Lender to the CPL.
9. If the Lender changes before issuing the CPL, change the Lender name in the Parties data entry group. Upon returning to this screen, select the Refresh icon  to pull the new Lender into the CPL. Any other new information, such as the Loan Number, will populate as well.
10. To search for the Lender in the Stewart Access database, enter information in the asterisked fields and select **Search**. The search will return any approved Lenders meeting the criteria entered in the asterisked fields.
11. If Successor language is needed, click the **Include Successor** check box and then select the language from the **Successor Language** picklist.



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12. Select the **Buyer/Borrower** tab.

13. Click the **Include** check box to add the Buyer/Borrower to the CPL.

14. If there is more than one Buyer/Borrower, select Include All to add all of the Parties to the CPL.

15. Select a Primary Buyer/Borrower.


16. Click the **Property Address Info** tab.

17. Click the **Include** checkbox to add the Property to the CPL.



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 **Note** – There can be more than one party or property listed. If multiple parties or properties need to appear on the CPL click the **Include All** checkbox to include all of them, or select individuals by navigating using the direction arrows



18. Click the **Preview/Save CPL**  icon to save all entries to the CPL.

CPL_Train : Closing Protection Letter
Closing Protection Letter


CPL Order

Issuing Agency
AIM Title Company

	CPL Date	CPL Number	Status	Covered Party	Lender	Buyer	Seller	Property Address
▶	1/13/2015 6:5...		Draft					

CPL Date * State * Location * Covered Party *
01/13/2015 TX Texas Title West Lender

Form * Location Group Serial Number Status Max Liability Void Date
Texas T-50 Lender Insured Closing Service Letter - Draft \$0.00

 **Note** - Information is not saved to the CPL until the **Preview/Save** icon is selected. Entries made to the CPL are not saved back to the Order

19. Click the **Issue**  button to Issue the CPL.

 **Note** – You are required to **Preview** the CPL before issuing the CPL.