



Stewart Access Closing Protection Letters (CPL)

User Guide

March 11, 2016

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Stewart Access – Closing Protection Letter

Before you begin:

Stewart Access performs best with the latest versions of Google Chrome and Internet Explorer. Mozilla's Firefox is NOT recommended.

Creating

To create a Closing Protection Letter inside the Stewart Access Portal, follow these steps:

Select **CPL** from the menu.



Enter **File Number**, **State**, **Covered Party**, and **Form**

Primary	Liability Amount	PropertyType	Address Line 1	Address Line 2	City	State	ZIP




The **Date** field will default to today's date.



The **Location** field will default the Agency's location. A **Branch** may be chosen from the picklist otherwise None will default.



Property Address

Select the **Property** tab, then click the **Add** icon .



NOTE: The Property **Address** is required to create a CPL.

Property		Lender	Buyer/Borrower	Seller	Attorney	Secondary Agency		
<div>+</div>								
PropertyType	Address Line 1	Address Line 2	City	State	ZIP	County	Country	Lc

Enter the Property **Address**, click **Save**.

Add Property

Save Cancel

File Number		Agency	
tmark4		StewartAccess Test Agency Inc	
Property Type	Address Line 1	Address Line 2	
Single Family Dwel ▼			
County	City	State	
Aleutians East ▼		AK ▼	
ZIP	Country		
	USA		
Lot	Block	Section	
Subdivision	PIN	Metes And Bounds	

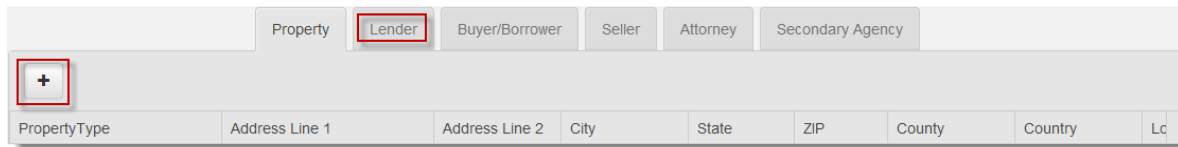



For multiple **Addresses**, duplicate the process above.

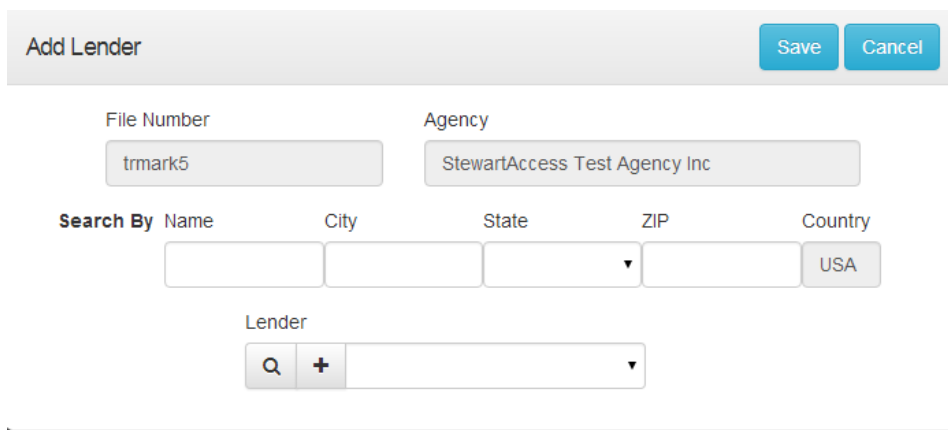



Lender


Select the **Lender** tab, then click **Add** .  NOTE: A Lender is required to create a CPL.

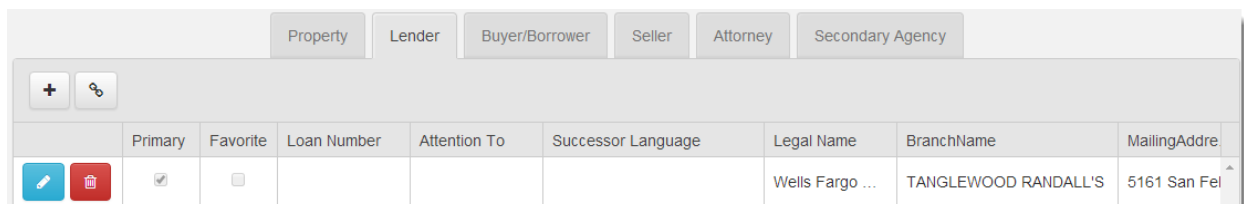


Enter the **Search By** criteria, click **Search**. 



Select the desired Lender from the picklist. If the Lender you desire is not listed, manually enter the Lender information by clicking the **Add** icon  and entering the information in the fields provided. Click **Save**. Add Additional Lenders by duplicating the process described above.

Lender information such as the Loan Number, Attention To and Successor Language by clicking the Edit icon .




The Primary checkbox is defaulted checked. NOTE: A CPL must have a Primary Lender indicated. If there is more than one Lender on a file, only one may be marked as Primary.




The Lender may be selected as a "Favorite". When marked, that Lender will appear at the top of the picklist thereafter.



If any information entered for a Lender requires editing after clicking **Save**, delete the existing record and create another one.



Buyer/Borrower

Select the **Buyer/Borrower** tab, and then click **Add.** 

Property		Lender		Buyer/Borrower	Seller		Attorney		Secondary Agency	
<div></div>										
PropertyType	Address Line 1	Address Line 2	City	State	ZIP	County	Country	Lc		

Enter the Buyer/Borrower name or Business Name and Address. Click **Save.**

Add Buyer/Borrower

Save Cancel

File Number

trmark4

Agency

StewartAccess Test Agency Inc

First Name

Middle Name

Last Name

Business Name

Address Line 1

Address Line 2

City

State

AK ▼

ZIP

Country

USA



For multiple Buyer/Borrowers, duplicate the process described above.



NOTE: If any information entered for a Buyer/Borrower requires editing after clicking **Save**, delete the existing record and create another one.



Seller

Select the **Seller** tab, and then click **Add**.

The screenshot shows a navigation bar with tabs: Property, Lender, Buyer/Borrower, **Seller** (highlighted with a red box), Attorney, and Secondary Agency. Below the tabs is a form with a '+' button in a box on the left and several input fields: PropertyType, Address Line 1, Address Line 2, City, State, ZIP, County, Country, and Lc.

Enter the Seller name or Business Name and **Address**. Click **Save**.

The 'Add Seller' form has a title bar with 'Add Seller' and 'Save'/'Cancel' buttons. It contains the following fields:

- File Number**: Input field with 'trmark5'.
- Agency**: Input field with 'StewartAccess Test Agency Inc'.
- First Name**, **Middle Name**, **Last Name**: Three separate input fields.
- Business Name**: Input field.
- Address Line 1**, **Address Line 2**, **City**: Three separate input fields.
- State**: Dropdown menu with 'AK' selected.
- ZIP**: Input field.
- Country**: Input field with 'USA'.



For multiple Sellers, duplicate the process described above.



NOTE: If any information entered for a Seller requires editing after clicking **Save**, delete the existing record and create another one.



Attorney

Select the **Attorney** tab, if needed. Click **Add**.



Property		Lender		Buyer/Borrower		Seller		Attorney		Secondary Agency	
<div>+</div>											
PropertyType	Address Line 1	Address Line 2	City	State	ZIP	County	Country	Lc			

Enter **Search By** criteria and click **Search**. Select desired **Approved Attorney** or **Individual Attorney** from the picklist.



Property		Lender		Buyer/Borrower		Seller		Attorney		Secondary Agency	
Attorney: Search by providing the State and either Name, City or Zip											
<div>Search By</div> <div> <div>Name</div> <div>City</div> <div>State</div> <div>ZIP</div> <div>Country</div> </div> <div> <div></div> <div></div> <div>▼</div> <div></div> <div>USA</div> </div>											
Approved Attorney				Individual Attorney							
Q				Q							

Secondary Agent

Select the **Secondary Agency** tab, if needed. Enter **Search By** criteria. Click **Search**.




Property		Lender		Buyer/Borrower		Seller		Attorney		Secondary Agency	
<div>+</div>											
PropertyType	Address Line 1	Address Line 2	City	State	ZIP	County	Country	Lc			

Select desired **Secondary Agency** from the picklist.

Property		Lender		Buyer/Borrower		Seller		Attorney		Secondary Agency	
Secondary Agency: Search by providing the State and either Location, City or Zip											
<div>Search By</div> <div> <div>Location</div> <div>City</div> <div>State</div> <div>ZIP</div> <div>Country</div> </div> <div> <div></div> <div></div> <div>▼</div> <div></div> <div>USA</div> </div>											
Agency Location											
Q											



Click **Save**  to view a draft version of the CPL.



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A CPL remains in draft mode until it is issued. The CPL serial number is masked until the CPL is issued.

CPL#: XXXXX5780 Status: Draft

File Number

trmark5

State

CO

Location

211 East Moore Avenue

Agency

StewartAccess Test Agenc

Party

Buyer/Borrower

Branch

None

Date

8/11/2015

Form

CPL Single Transaction

Property 1

Lender 1

Buyer/Borrower 2

Seller 0

Attorney 0

Secondary Agency 0


	Primary	First Name	Middle Name	Last Name	Business Name	Address Line1	Address Line2	City	State
<div><div></div><div></div></div>	<input checked="" type="checkbox"/>	Robert		Byers		123 Elm Ave		Madison	TN
<div><div></div><div></div></div>	<input type="checkbox"/>	Betty		Byers		123 Elm Ave		Madison	TN



Click **Generate** to Issue the CPL.

All CPLs are issued with a unique Stewart serial number appearing at the bottom of each page:

CPL Single Transaction
Serial Number: 0000178055780

To Cancel an existing CPL, click **Cancel**.  This action will cancel the generated serial number.



If you are re-issuing a CPL after cancelling, follow the steps for creating a new CPL.

Notes

Once a record has been saved for a Property Address, Lender, Buyer/Borrower Name, Seller Name, Attorney, or Secondary Agent, it is available for "association". This feature provides the ability to copy saved information into a record without re-keying.

To **Associate** a saved record, click the **Associate** icon  and choose a record. This is especially useful when creating a jacket after a CPL is generated.

Associate Property

Save

Cancel

File Number

Agency

State

CPL_004

StewartAccess Test Agency Inc

TX

Select	Property Type	Address Line 1	Address Lin
<input type="checkbox"/>	Agricultural Land	1234 Address St.	



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Searching

After logging in through the portal, the following Search window displays. This Search features provides the ability to search for existing files with CPLs that have been created in the Portal. Enter your **Search** parameters and click **Search**.

Search

File Number From

Agency To

Buyer/Borrower Seller Property

The **Search** results appear at the bottom of the **Search** window:

Search

File Number From

Agency To

Buyer/Borrower Seller Property

		File Number	Modified Date	Buyer/Borrower	Seller	Property
Detail	Product	marktestz	3/17/2016	Bob Buyer	Sam Seller	2204 Milan Ct
Detail	Product	F-K-1	3/17/2016			
Detail	Product	D-5	3/17/2016			
Detail	Product	56-Testing-2016	3/17/2016	Lance Elston		15121 Stewae St.
Detail	Product	423525	3/17/2016			TEST

1 2 3 4 5 6 7 8 9 10 ... 1 - 5 of 429 items

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Selecting the Detail or Product links provides additional information about the file:

		File	Modified Date	Buyer Borrower	Seller	Property
Detail	Product	MAK1001	8/6/2015	John Smith		2100 Century road

The **Detail** link provides a summary view of the Properties, Lenders , Buyer and Sellers for the selected file.

Search
MAK1001
StewartAccess Test Agency IncJennifer Test agency

Property 1

+

PropertyType	Address Line 1	Address Line 2	City	State	ZIP	County	Country	Lot
Multi-Unit Dwelling 2-4 Units	2100 Century road		Paradise	OH	70007	Ashland	USA	first

Lender 0

Buyer/Borrower 1

Seller 0



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The **Products** link provides a summary of the created documents for the file selected.

Search

ASHTEST

StewartAccess Test Agency Inc.Jennifer Test agency

Jacket 0

Create New Jacket

	Form Type	Date	Form	Serial Number	Status	Property Line 1	Lender	Buyer	
No items to display									

CPL 1

Create New CPL

	Covered Party	Date	Form	CPL Number	Status	Property Line 1	Lender	Buyer	
Detail	Lender	8/7/2015	CPL Single Transaction	177836600	Issued	5762 Joe St.	Wells Fargo Bank, N.A.	Show Money	
1 - 1 of 1 items									

Charges 0

Premium T...	Premium Sub Type	Description	Serial Number	Actual Premium	Actual Remittance	Fee	Calculated P
No items to display							

To search for Details and Products use the File menu at the top of the page:

stewart access

File

CPL

Jacket

Contact

TPSTESTER3@dev.picdev.local

Log off

Product

Detail

Search

File Number

Agency

StewartAccess Test Agency

Jacket

CPL

Charges

Search

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