

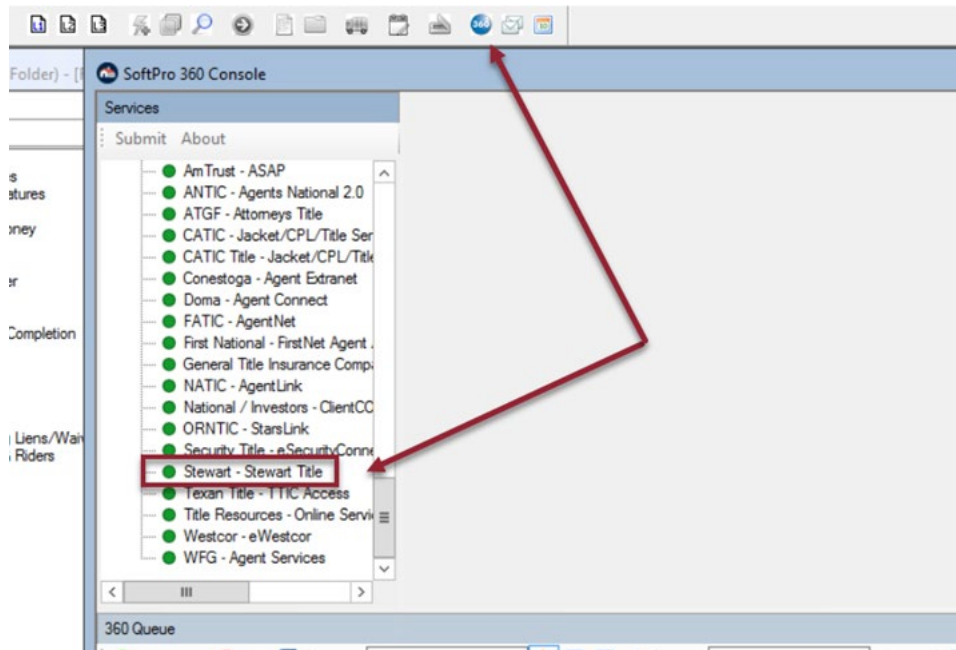
Stewart and SoftPro Integration- Jacket

Follow the steps below to utilize the Stewart integration with SoftPro to create a jacket.

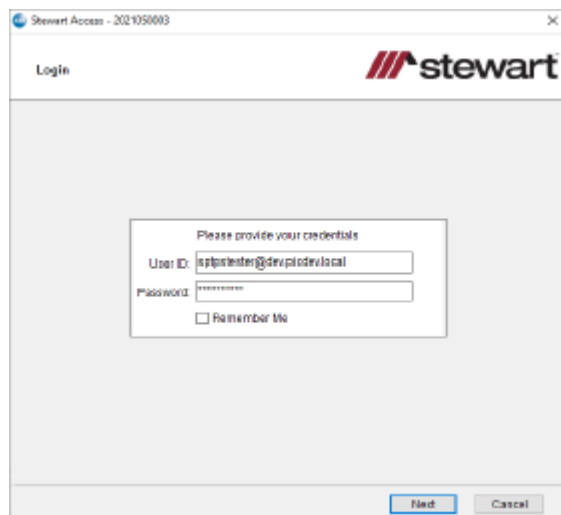
Note: This Quick Reference Card assumes a file has been entered and you are ready to issue a Jacket.

Steps

1. From the 360 Services menu, double-click **Stewart-Stewart Title** located under the Underwriter Services folder.



2. Enter your Stewart credentials. These may be saved by clicking **Remember Me**. Click **Login**.




Stewart and SoftPro Integration- Jacket

3. Click **Add Jacket**

Stewart Access - MSBDEMOVID

Title Services



Action	Product	Covered Party / Policy	Status	Created On
	Closing Protection Letter	Lender	Voided	7/6/2021 11:35 AM
	Policy Jacket	Owners	Voided	7/6/2021 11:52 AM
	Policy Jacket	Loan	Voided	7/6/2021 11:53 AM
	Closing Protection Letter	Lender	Completed	7/6/2021 4:20 PM

Add CPL

Add Jacket

Update

Void

Order Information

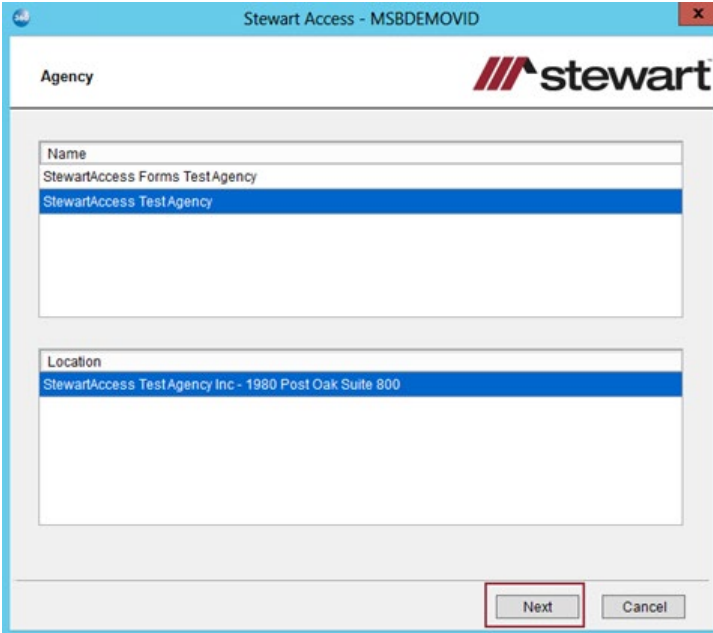
[StewartAccess Portal](#)

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Close

4. Enter **Agency Name and Location**

Stewart and SoftPro Integration- Jacket



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Agency

Name

StewartAccess Forms TestAgency

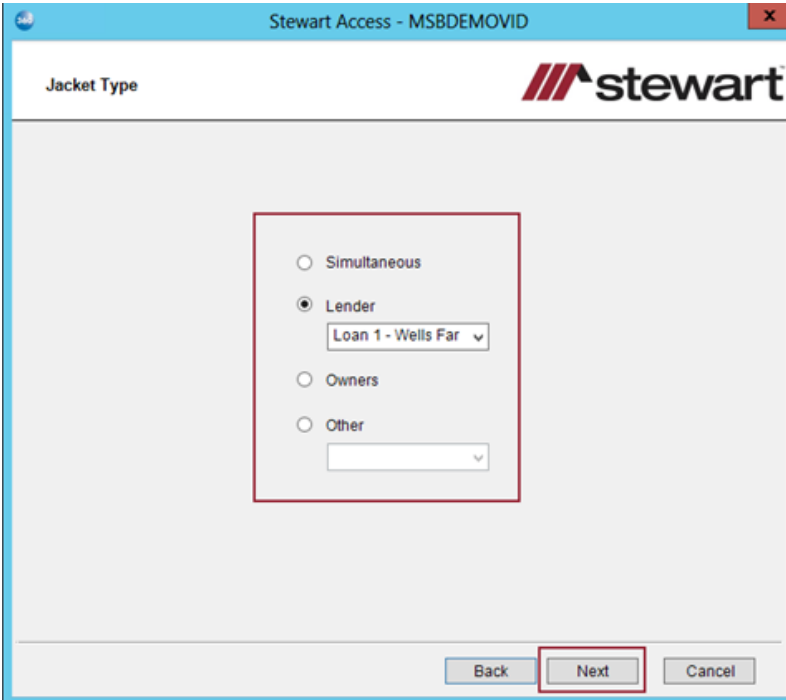
StewartAccess TestAgency

Location

StewartAccess TestAgency Inc - 1980 Post Oak Suite 800

Next Cancel

5. Select the **Jacket Type**. You may select **Simultaneous** to prepare both an Owners and Loan policy together. Click **Next**.



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Jacket Type

Simultaneous

☒ Lender

Loan 1 - Wells Far

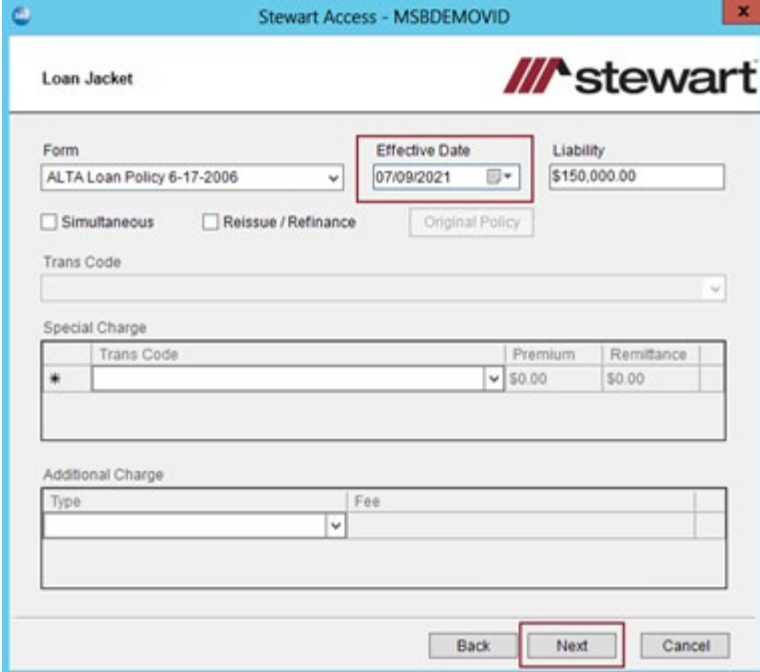
Owners

Other

Back Next Cancel

6. Enter an **Effective Date**. The policy liability will pull from the file if entered there. **Transaction Codes** are mapped except in TX, NM, and CT. Enter any **Special Charges** and **Additional Charges**, if applicable. Click **Next**.

Stewart and SoftPro Integration- Jacket



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Loan Jacket

Form: ALTA Loan Policy 6-17-2006

Effective Date: 07/09/2021

Liability: \$150,000.00

☐ Simultaneous ☐ Reissue / Refinance

Trans Code:

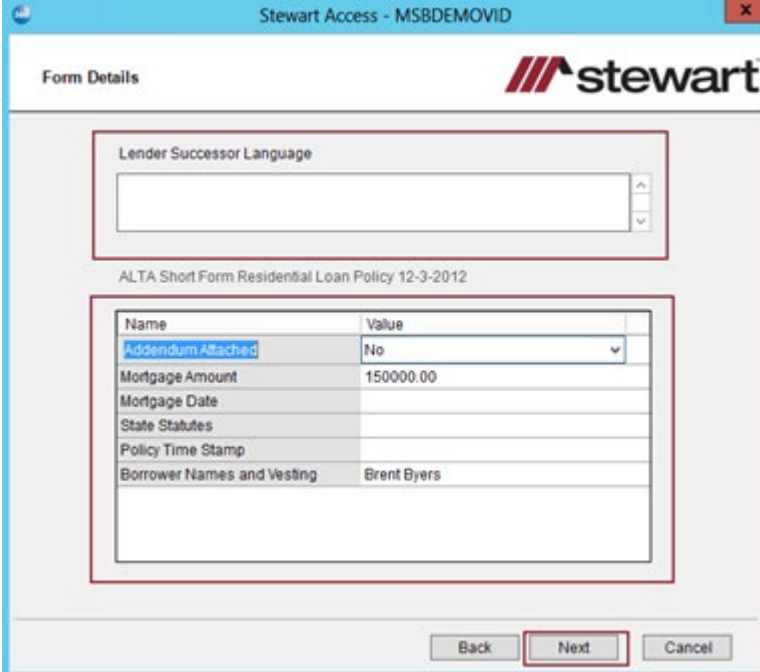
Special Charge

Trans Code	Premium	Remittance
*	\$0.00	\$0.00

Additional Charge

Type	Fee

- Enter **Lender Successor Language**, if needed. For Short Form Jackets, complete the **Form Details** grid. Click **Next**.



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Form Details

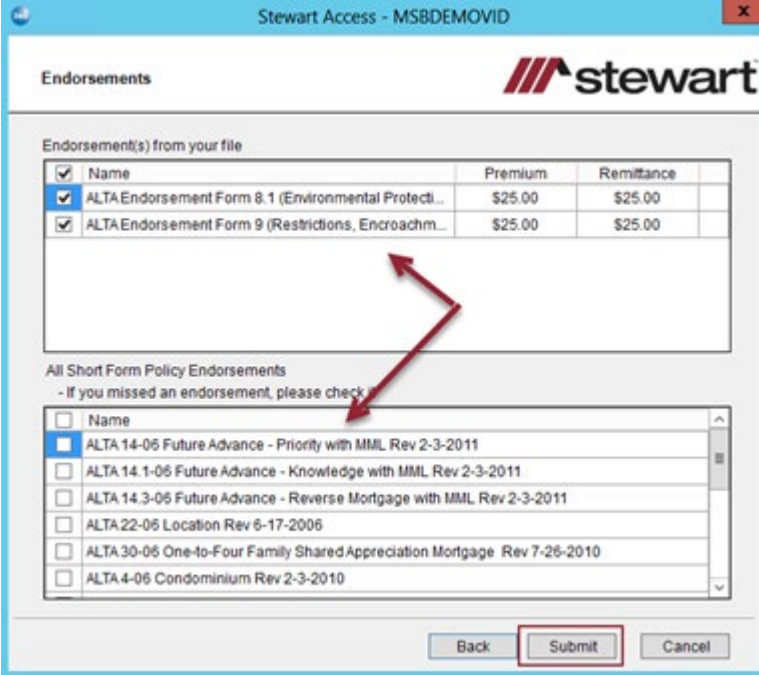
Lender Successor Language

ALTA Short Form Residential Loan Policy 12-3-2012

Name	Value
Addendum Attached	No
Mortgage Amount	150000.00
Mortgage Date	
State Statutes	
Policy Time Stamp	
Borrower Names and Vesting	Brent Byers

- Endorsements and Premiums entered in the file will populate the top grid. Select additional Endorsements from the bottom grid. Selecting here will check the boxes on the Short Form. Click **Submit**.

Stewart and SoftPro Integration- Jacket



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Endorsements

Endorsement(s) from your file

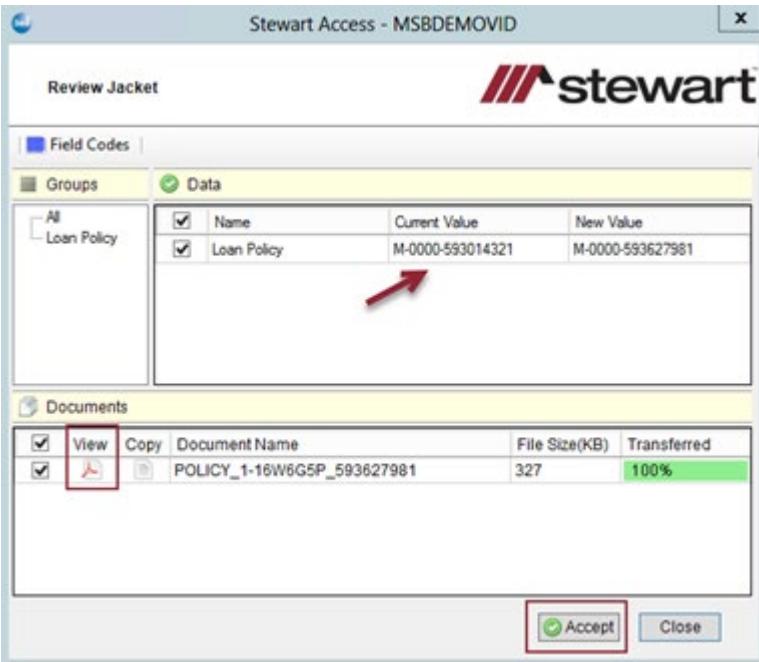
<input checked="" type="checkbox"/>	Name	Premium	Remittance
<input checked="" type="checkbox"/>	ALTA Endorsement Form 8.1 (Environmental Protecti...	\$25.00	\$25.00
<input checked="" type="checkbox"/>	ALTA Endorsement Form 9 (Restrictions, Encroachm...	\$25.00	\$25.00

All Short Form Policy Endorsements
- If you missed an endorsement, please check

<input type="checkbox"/>	Name
<input checked="" type="checkbox"/>	ALTA 14-06 Future Advance - Priority with MML Rev 2-3-2011
<input type="checkbox"/>	ALTA 14.1-06 Future Advance - Knowledge with MML Rev 2-3-2011
<input type="checkbox"/>	ALTA 14.3-06 Future Advance - Reverse Mortgage with MML Rev 2-3-2011
<input type="checkbox"/>	ALTA 22-06 Location Rev 6-17-2006
<input type="checkbox"/>	ALTA 30-06 One-to-Four Family Shared Appreciation Mortgage Rev 7-26-2010
<input type="checkbox"/>	ALTA 4-06 Condominium Rev 2-3-2010

Back Submit Cancel

9. The Jacket is rendered and listed in the **Review Jacket** top grid. Select the Adobe icon to view the Jacket. Click **Accept** to push the document into the file's document list.



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Review Jacket



Field Codes

Groups

Loan Policy

<input checked="" type="checkbox"/>	Name	Current Value	New Value
<input checked="" type="checkbox"/>	Loan Policy	M-0000-593014321	M-0000-593627981

Documents

<input checked="" type="checkbox"/>	View	Copy	Document Name	File Size(KB)	Transferred
<input checked="" type="checkbox"/>			POLICY_1-16W6G5P_593627981	327	100%


Accept Close

10. The jacket is now listed in the Title Services grid. Select the Jacket and click Update or Void to perform those functions.

Stewart and SoftPro Integration- Jacket

Stewart Access - MSBDEMOVID

Title Services



Action	Product	Covered Party / Policy	Status	Created On
	Policy Jacket	Loan	Completed	7/9/2021 5:52 AM
Closing Protection Letter		Lender	Voided	7/6/2021 11:35 AM
Policy Jacket		Owners	Voided	7/6/2021 11:52 AM
Policy Jacket		Loan	Voided	7/6/2021 11:53 AM
Closing Protection Letter		Lender	Completed	7/6/2021 4:20 PM

Add CPL

Add Jacket

Update

Void

Order Information

[Stewart Access Portal](#)

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