



Mimicking a User in Stewart Now

Quick Reference Guide — July 2019

Overview

This document walks you through what you need to know to use the **View As** feature in Stewart Now to mimic another user, particularly a party that is working on an order such as a Realtor or Lender. When selected, **View As** allows you to make changes to your client's profile on their behalf. These changes include, updates to profile pictures, notifications, and communications.

You can access this feature one of two ways:

- From Contacts
- From the Snapshot page of an order

Prerequisite

As a prerequisite, this feature is only available for Stewart employees, Business Development Officers (BDOs) and Escrow Officers.

Using View As from Contacts

Complete these steps to use the View As feature from Contacts.

Steps

- 1. Log into Stewart Now.
- 2. From the top-right menu, select Contacts.







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3. Select the person's name that you want to represent.



4. Click View As.

JON TAG TS - ALL					
1	abc 💌				
R		Rachel Rall			
*	Rachel Rall Account Manager at Houston Demo Realty	Account Manager at Houston Demo Realty Houston, Texas			
Т		7 contacts			
* [Stewart Title Title at Stewart Title Company	Send Message Edit Details View As			
		Address: 9700 Bissonnet, Suite 2000			





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Notice the contact's dashboard where you can make changes on their behalf.







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5. To make changes to their Notifications for them, go to **Settings/Order Notifications**. Whatever changes you make here will be saved to their account.

	Dashboard	Orders F	Property Search	Calculate Fees	More Tools	Locations	
Settings	COMMUNICATIONS - ORDER NOTIFICATIONS			Profile Comple			
Personal Information Contact Information Privacy Controls	SEND TO Order notifications will be sent to your primary email address as well as any of your other email addresses you wish to include.				13 % Complete Completion Tips Tell Others About Yourself Add Work Experience		
Ribbon Level Activity Stream	Email Text Message juliane.jones@stewart.com (Busimess) Primary						
Special Instructions / Notes					Add Awards		
Communications Order Notifications	ORDER NOTIFICATIONS Non-Order Specific Notifications This set of notifications is not specific to an order type. Notification			All-Time Stats Member since: January 25, 2018 Profile Hits: 7			
Order Comments Inbox Messages				Orders Open: Orders Closed: Contacts:	2 0 7		
Stewart Title Communications		Email Attachment					
	Escrow Order Opened	ON	N/A	Add a link to your goes directly to y	i.		
	Escrow Order Cancelled	ON	N/A	View My Stewart Profile			
	Title Order Opened	ON	N/A	View Source Cod			
	Title Order Closed	OFF	N/A				
	Title Order Cancelled	ON (N/A				
	Title Order Completed	OFF	N/A				
	Changes to a Good Faith Estimate of Title and Escrow Fees	ON	ON (
	Weekly Transaction Summary	OFF	N/A				

6. To stop **Viewing As** this person, simply select **Logoff** from the top right menu.



Logging off redirects you to your Dashboard.





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Using View As from the Snapshot Page of an Order

Complete these steps to use the View As feature when working on the Snapshot page of an order.

Steps

- 1. Log into Stewart Now.
- 2. Open an Order's Snapshot page and select Contacts.

This Order	ORDER SNAPSHOT Back To All Orders			Page Options		
Snapshot	1117 Broadmoor Dr. Davton, OH 45419				-	
Detail OrderTrac	Order Type: Purc Opened: 05/2	Order Type: Purchase Order Ref #: Opened: 05/20/2019 Est. Close Date: 06/19/2019			Recently Viewed Orders	
Property Information	STEWART TITLE ORDERTRAC Title Order 295877			1117 Broadmoor Dr Last viewed about 4 minutes ago		
Comments				Dallar	929 Buccaneer Dr #20-3 Last viewed about 50 minutes ago	
	Gree Openeo	Title Commitment/Presiminary repon	Transaceon Comprese	Policy	3607 Brook Run Dr Last viewed about 19 hours ago	
				1	508 Powers Ave Last viewed about 20 hours ago	
	5/20/2019 12:57 PM		6/19/2019 (Est)		456 NO ROLE TEST Last viewed on 5/09/2019 at 10:35 AM	

3. Click View As.



- To confirm who you are representing, look under your name in the Contacts.
- If you're representing both parties (Buyer and Seller), then it will show up as Both.





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4. You will see that contact's Dashboard where you can make changes on their behalf.

	ACTIVITY STREAM - ALL	View Activity from: All - up to: Today		
	Stream Something	ØP Add a link:		
	No activ	vity found		
Greg Framer				
ast Login. 5/31/2019 at 9:45 AM				
Profile Completion Progress				
3 % Complete				
Completion Tips				
Add a Photo				
Add a Company Logo				
Tell Others About Yourself				





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	Dashboard	Orders Pr	roperty Search	Calculate Fees	More Tools	Location	
Settings	COMMUNICATIONS - ORDER NOTIFICATIONS			Profile Completion Progress			
Personal Information Contact Information Privacy Controls	SEND TO Order notifications will be sent to your primary email address as well as any of your other email addresses you wish to include.				13 % Complete Completion Tips Tell Others About Yourself Add Work Experience		
Ribbon Level Activity Stream Special Instructions / Notes	Email Text Message						
Communications Order Notifications	(Business) ORDER NOTIFICATIONS Non-Order Specific Notifications This set of notifications is not specific to an order type			All-Time Stats Member since:	18		
Order Comments Inbox Messages	Notification			Orders Open: Orders Closed: Contacts:	/ 2 0 7		
Stewart Title Communications	Escrow Order Opened Escrow Order Closed		N/A N/A	Promote Yours Add a link to your goes directly to yo Title.	1		
	Escrow Order Cancelled Title Order Opened	ON ON	N/A N/A	View My S View Source Cod			
	Title Order Closed Title Order Cancelled Title Order Completed	OFF ON OFF	N/A N/A N/A				
	Changes to a Good Faith Estimate of Title and Escrow Fees		(ON ()				
	Weekly Transaction Summary	OFF	N/A				

6. To stop Viewing As this person, simply select Logoff from the top right menu.

	Greg Framer 📕
	View Profile
Messages	
Contacts	7.3
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← Logoff	

Logging off redirects you to your Dashboard.