



## 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

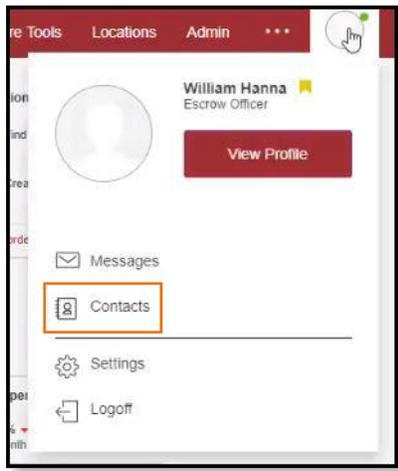
As a prerequisite, this feature is only available for Stewart employees, Business Development Officers (BDOs) and Escrow Officers.

### 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**.

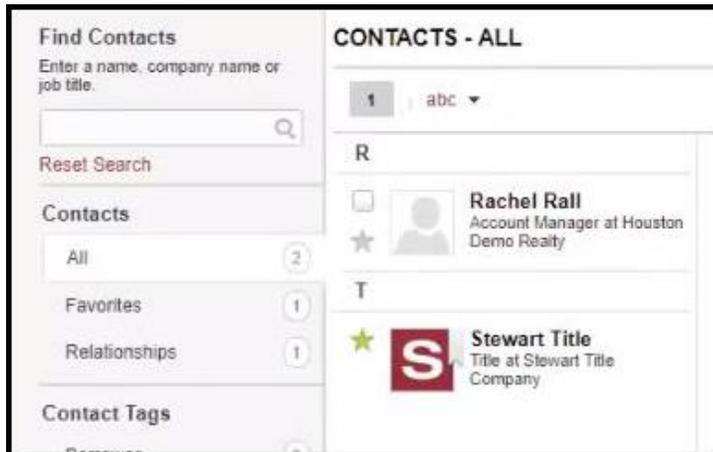




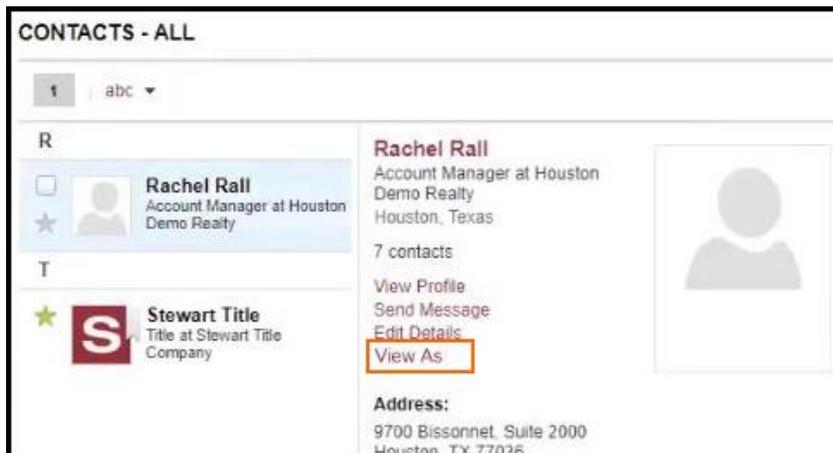
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3. Select the **person's name** that you want to represent.



4. Click **View As**.





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

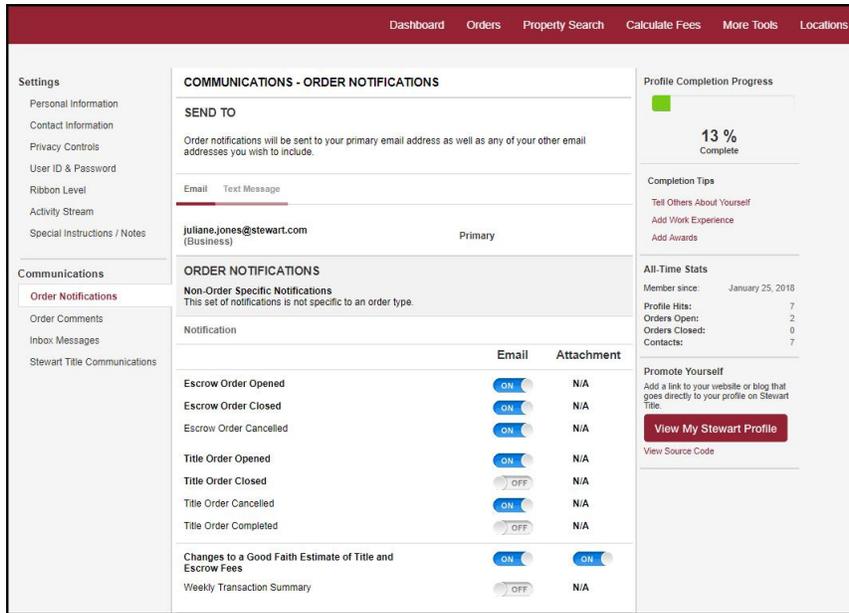
The screenshot displays a user profile for Rachel Rall. On the left, the profile includes a placeholder photo, the name "Rachel Rall", and a "Last Login" of 5/21/2019 at 10:05 AM. Below this is a "Profile Completion Progress" bar at 3% complete, with "Completion Tips" such as "Add a Photo", "Add a Company Logo", and "Tell Others About Yourself". The "Activity Stream" section on the left lists "All", "Orders", "Properties", "Messages", "Profiles", and "Connections". The main "ACTIVITY STREAM - ALL" section on the right shows a list of activities, including multiple "Order Origination" events for Cj Montgomery with various addresses and dates, and a "Stewart Title" notification about a Plat Map creation.



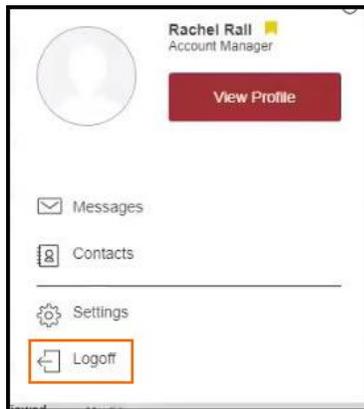
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- To make changes to their Notifications for them, go to **Settings/Order Notifications**. Whatever changes you make here will be saved to their account.



- 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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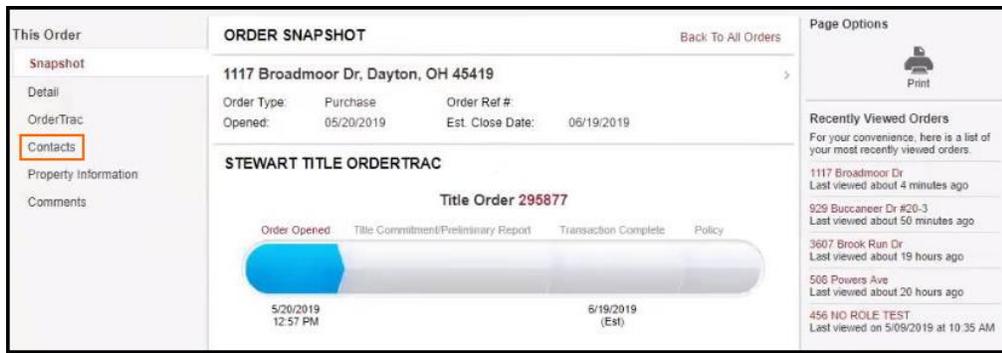
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### Using View As from the Snapshot Page of an Order

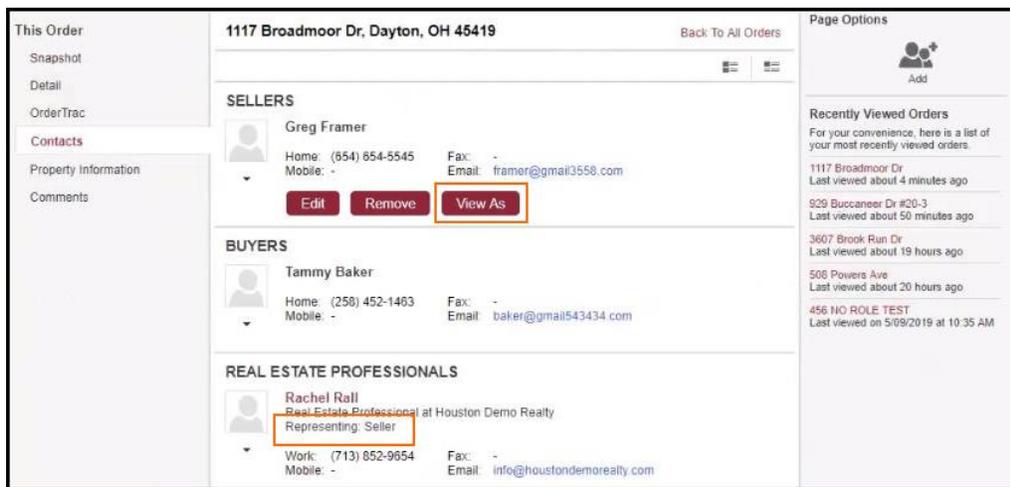
Complete these steps to use the View As feature when working on the Snapshot page of an order.

#### Steps

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



3. Click **View As**.



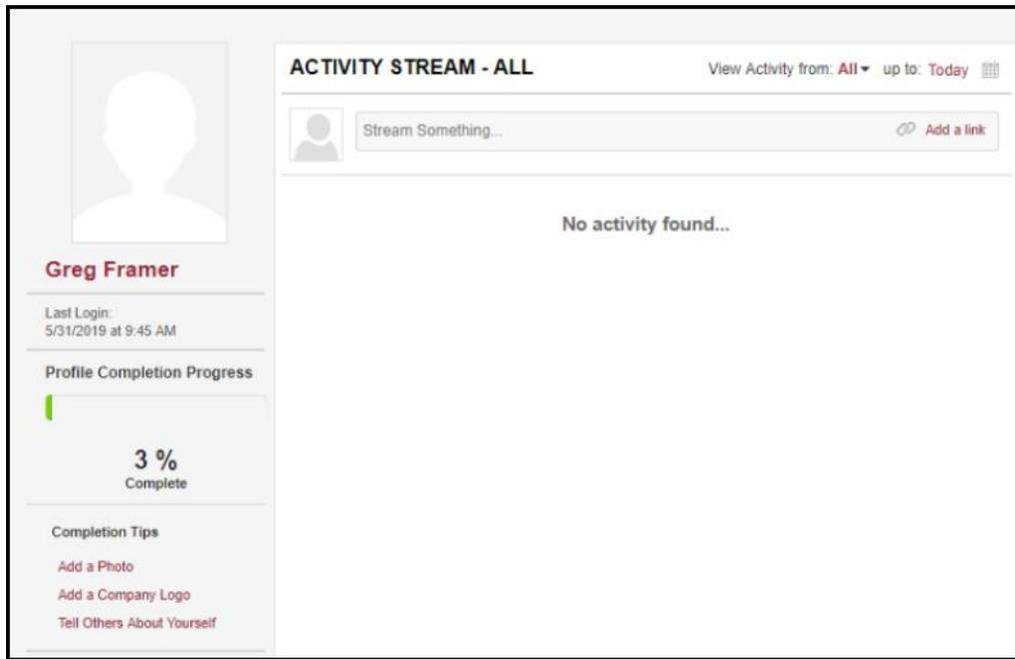
- To confirm who you are representing, look under your name in the Contacts.
- If you're representing both parties (**Buyer** and **Seller**), then it will show up as **Both**.



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

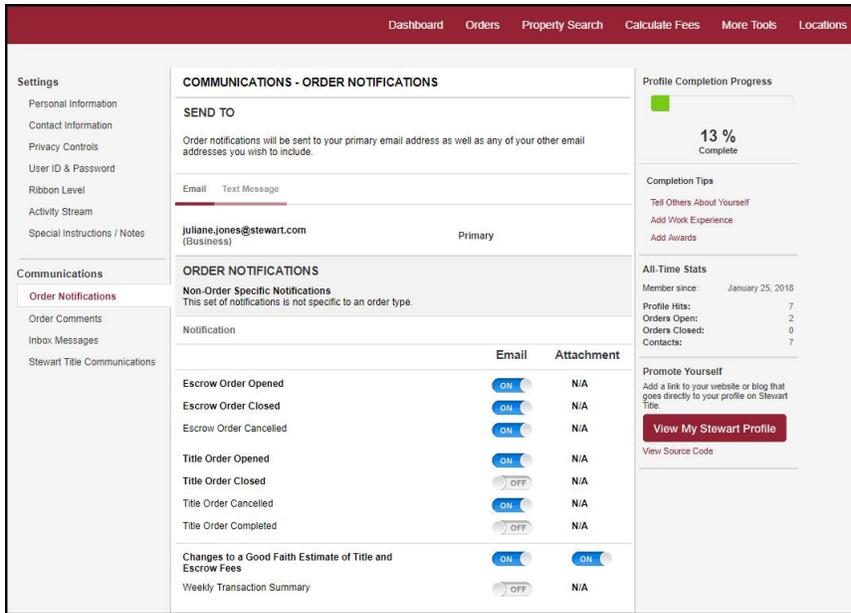




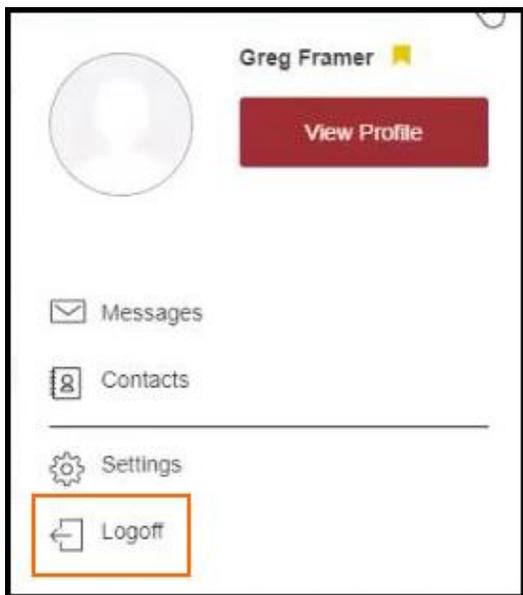
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