

Stewart Now Release Notes June 9, 2019 Version 2.6



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Stewart Now 2.6 Release Notes

Stewart Now 2.6 includes added functionality, enhancements and fixes. This document provides users with a brief introduction to new features and functionality implemented with this release and any defects that have been corrected.

Deployment Date: June 9, 2019

New in This Release

An overview of new features and modifications to Stewart Now 2.6 Release include:

- Addition of View As feature, to make changes on client's account on their behalf.
- Embedment of Stewart Rate Calculator (SRC) into Stewart Now.
- Update of Stewart's Corporate Office address on Property Profile Report.
- Multiple changes to Order Origination.
- Multiple bug and defect fixes.

Stewart Now Enhancements

View As – For Stewart Employees, BDOs, Escrow Officers

Stewart Employees, Business Development Officers, and Escrow Officers now have the option to mimic a user, particularly any party that they are working with on an Order (*Realtor, Lender*). The View As feature will allow you to make changes to your client's profile on their behalf. These changes include changing profile pictures, notifications, and communications.

You can access this feature in one of two ways:

- From Contacts
- From the Order's Snapshot page

Method 1

Steps

Follow these steps to View As a user from Contacts.

1. Log into your account.

	ACTIVITY STREAM - ALL View Activity from: All + up to: Today	Find a Property
	Stream Something Ø Add a link	Create a Net Sheet
	Order Origination (order source) opened an order. About Hours ago - Order Opened 1708 Nambe Ave ME, Albuquerque, NM 87123,	Find a recorded document
William Hanna	Snapshot Details Escrow/Title Status Comments	Contacts
Last Login	Pin to Top	S
5/21/2019 at 9:30 AM	Order Origination opened an order for Cj Montgomery (order source). About 21 hours ago - Order Opened	See all
Profile Completion Progress	1117 Broadmoor Dr , Dayton, OH 45419,	former of
	▼ Snapshot Details Escrow/Title Status Comments ▼	Orders Opened Monthly +
6 %	Pin to Top	3 67% - 9 This Month Last Month

2. From the top-right menu, select Contacts.



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



4. Click View As.

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

- 5. You will see the contact's dashboard where you can make changes on their behalf.
 - Stream Something Add a link Order Origination opened an order for Cj Montgomery (order source). About 21 hours ago - Order Opened 1117 Broadmoor Dr , Dayton, OH 45419, Rachel Rall Snapshot | Details | Escrow/Title Status | Comments * Pin to Top Last Login: 5/21/2019 at 10:05 AM Order Origination opened an order for Cj Montgomery (order source). 4/11/2019 8:52 AM - Order Opened 4/11/2019 8:52 AM - Order Op Profile Completion Progress 929 Buccaneer Dr #20-3 , Schaumburg, IL 60173, Snapshot Details Escrow/Title Status Comments ſ * Pin to Top 3 % Order Origination opened an order for Cj Montgomery (order source). 3/22/2019 10.12 AM - Order Opened Complete 3607 Brook Run Dr , Des Moines, IA 50317, Completion Tips * Snapshot Details Escrow/Title Status Comments Add a Photo . Add a Company Logo Pin to Top Tell Others About Yourself Stewart Title The Plat Map has been created with a property address of 16430 Willingham Way, Houston, TX 77095 on 2/12/2019 at 4:53 PM by Robun Kartolo. Activity Stream 2/12/2019 4:53 PM - Orders All Pin to Top Orders Order Origination opened an order for Cj Montgomery (order source). 2/12/2019 1 48 PM - Order Opened Properties 508 Powers Ave , Madison, WI 53714, Messages Snapshol Details Escrow/Title Status Comments . Profiles Pin to Top Connections Order Origination opened an order for Cj Montgomery (order source). 2/12/2019 8 26 AM - Order Oneged 2202 Gilbert Rd , Madison, WI 53711, Snapshot Details Escrow/Title Status Comments Pin to Top
- 6. To stop Viewing As this person, you will need to log off from the top right.

\bigcirc	Rachel Rall Account Manager			
\bigcirc	View Profile			
Messages				
Q Contacts				
දරු Settings				
E Logoff				

Logging off redirects you to your Dashboard.

Method 2

Steps

Follow these steps to View As a user from the Order's Snapshot page.

1. Log into your account.



2. Open an Order's Snapshot page and select Contacts.

This Order	ORDER SNAPSH	Page Options				
Snapshot	1117 Broadmoor Dr, Dayton, OH 45419					
OrderTrac	Order Type: Pure Opened: 05/2	chase Order Ref # 20/2019 Est. Close Date:	06/19/2019		Recently Viewed Orders For your convenience, here is a list of	
Property Information	Property Information STEWART TITLE ORDERTRAC					
Comments	Order Opened Title Commitment/Preliminary Report Transaction C			Policy	929 Buccaneer Dr #20-3 Last viewed about 50 minutes ago	
					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.

This Order	1117 Broadmoor Dr, Dayton, OH 45419	Back To All Orders		Page Options		
Snapshot		t:	==	Add		
OrderTrac	SELLERS Greg Framer			Recently Viewed Orders		
Contacts	Hame /EEA/SEA/SEA/SEA/			your most recently viewed orders.		
Property Information	Mobile: - Email: framer@gmail3558.com			1117 Broadmoor Dr Last viewed about 4 minutes ago		
Comments	Edit Remove View As			929 Buccaneer Dr #20-3 Last viewed about 50 minutes ago		
	BUYERS			3607 Brook Run Dr Last viewed about 19 hours ago		
	Tammy Baker			508 Powers Ave Last viewed about 20 hours ago		
	Home: (258) 452-1463 Fax:			456 NO ROLE TEST Last viewed on 5/09/2019 at 10:35 AM		
	REAL ESTATE PROFESSIONALS					
	Rechel Rall Real Estate Professional at Houston Demo Realty Representing: Seller					
	Work: (713) 852-9654 Fax: - Mobile: - Email: info@houstondemorealty.com					

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

- ACTIVITY STREAM ALL

 View Activity from: All + up to: Today

 Image: Completion Progress

 3 %
- 4. You will see that contact's Dashboard where you can make changes on their behalf.

5. To stop Viewing As this person, you will need to log off from the top right.

\frown	Greg Framer 📕				
	View Profile				
Messages					
g Contacts					
දිරි} Settings					
← Logoff					

Complete

Completion Tips Add a Photo Add a Company Logo Tell Others About Yourself

Logging off redirects you to your Dashboard.

Stewart Rate Calculator – Integration Modifications

To lessen confusion when creating a Net Sheet in the Portal, we have streamlined the experience for our customers. Going forward, you will only see the **Stewart Rate Calculator**, which can be found on the top navigation in between **More Tools** and **Property Search**.

	Dashboard	Orders	Property Search	Stewart Rate Calculate	or More Tools	Locations	Admin	•••	
ACTIVITY STRE	AM - ALL		View Activity from	All ▼ up to: Today mini	Page Options				
Stream Som	ething			Ø Add a link	Stewart Rate	Calculator			
	N	lo activity	found		Find a recorded docume	ent			

Any request sent from Stewart Now to SRC will be tagged with a Reference ID known as SNW.

Property Profile Report – Updated Corporate Address

In the *Property Profile Report*, the address for Stewart's Corporate address has been changed to 1360 Post Oak Blvd., Suite 100, Houston, TX 77056.

Order Origination Business Source

The following changes were made related to **Order Origination** sources, for orders originating from ResWare:

- The Business Source Order Origination will not be displayed on the Contacts page in the Stewart Now website.
- The Account Manager Account-Manager Not-Provided will not be displayed on the Contacts page in the Stewart Now website.
- The Business Source Order Origination will not be displayed in the Participants/Order Contacts in the Stewart Now email notification.
- The Account Manager Account-Manager Not-Provided will not be displayed in the Participants/Order Contacts in the Stewart Now email notification.
- The Dashboard will still display Order Origination.

Defects

Weekly Summary Email - Formatting

Phone Numbers will be displayed with (xxx) xxx-xxxx format in the Weekly Summary Report, to resemble how numbers display in the *Contact* section of Stewart Now. The Sales Price field will have a \$ sign to indicate that it's a amount field.

User Redirection after Unsubscribing in Weekly Transaction Summary Email

When unsubscribing from the **Weekly Transaction Summary** email, you will be redirected to the *Order Notifications* page.

Stewart Track - Renamed

On the Stewart Now landing page, Stewart Track has been renamed to OrderTrac.

Display Orders (Single/Multiple) on Dashboard – External Users

When logging in to Stewart Now, if you have single or multiple orders, they will be displayed on the Dashboard.

Additional Information

Training

For additional information, training and documentation about Stewart Now, please see the <u>Stewart Now BDO Training</u> <u>Center</u> or the customer-facing <u>Stewart Now Training Center</u>.

Technical Support

For technical support, contact the Stewart Customer Care Center at 1.877.800.3132 or <u>StewartNowSupport@stewart.com</u>.