Using Collaboration Center with Stewart Title

User Guide

September 2020

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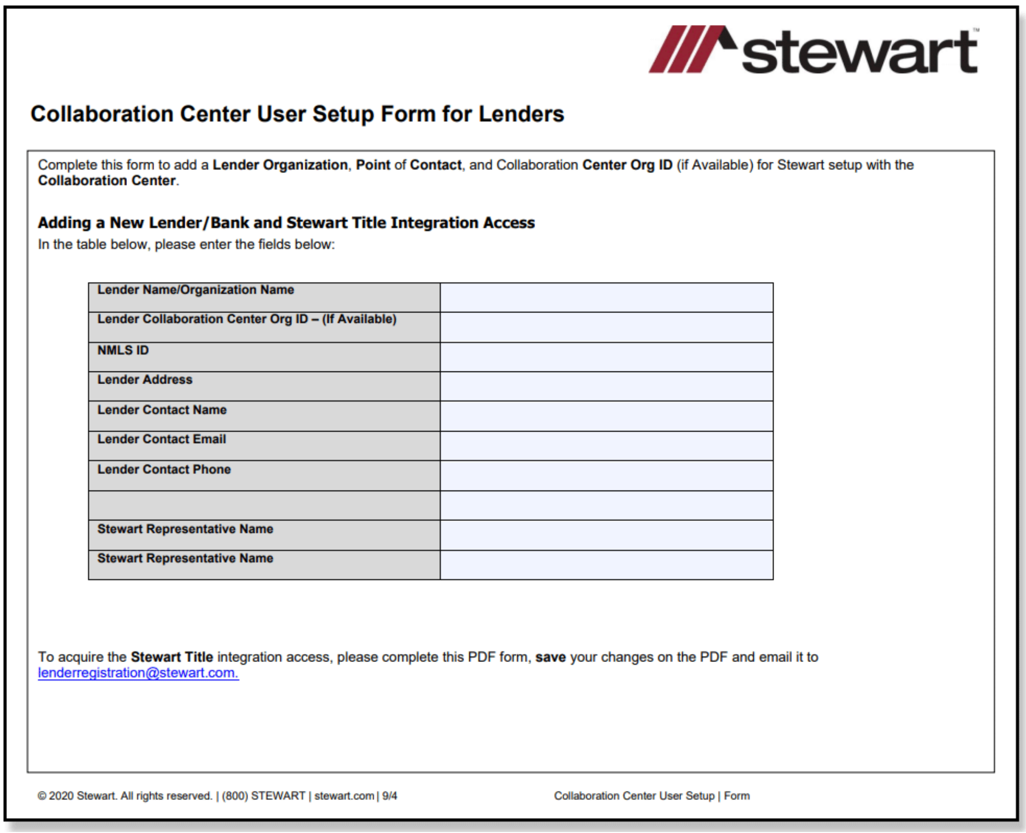
Introduction

This document walks you through how to set up your **Lenders** and use the **Stewart Title Company** interface in **Collaboration Center** to place orders.

Prerequisites

Lender Setup

An on-boarding process is required for Lenders to be set up properly to use the *Stewart Title Company* interface in *Collaboration Center*. Before this integration can be used, an account with Stewart must be created with the names of users who will submit orders. Your Stewart Representative will provide you with the necessary form, as shown below to request access to this interface. You can also view the form here.



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Collaboration Center User Setup Form for Lenders

Complete this form to add a **Lender Organization**, **Point** of **Contact**, and Collaboration **Center Org ID** (if Available) for Stewart setup with the **Collaboration Center**.

Adding a New Lender/Bank and Stewart Title Integration Access

In the table below, please enter the fields below:

Lender Name/Organization Name	
Lender Collaboration Center Org ID – (If Available)	
NMLS ID	
Lender Address	
Lender Contact Name	
Lender Contact Email	
Lender Contact Phone	
Stewart Representative Name	
Stewart Representative Name	

To acquire the **Stewart Title** integration access, please complete this PDF form, **save** your changes on the PDF and email it to lenderregistration@stewart.com.

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Browser Compatibility

Collaboration Center works best when opened in **Microsoft Internet Explorer 11** or **above**.

Launching Collaboration Center

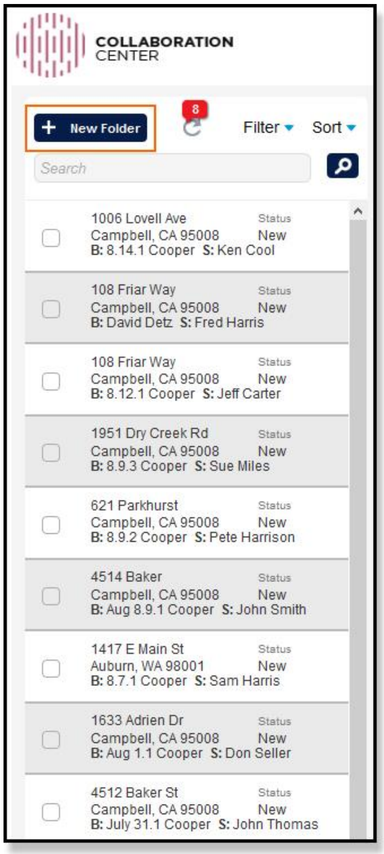
To get started, log into Collaboration Center with the credentials provided to you by the Collaboration Center team. Once logged in, you can open an Order with Stewart Title.

Opening an Order with Stewart Title

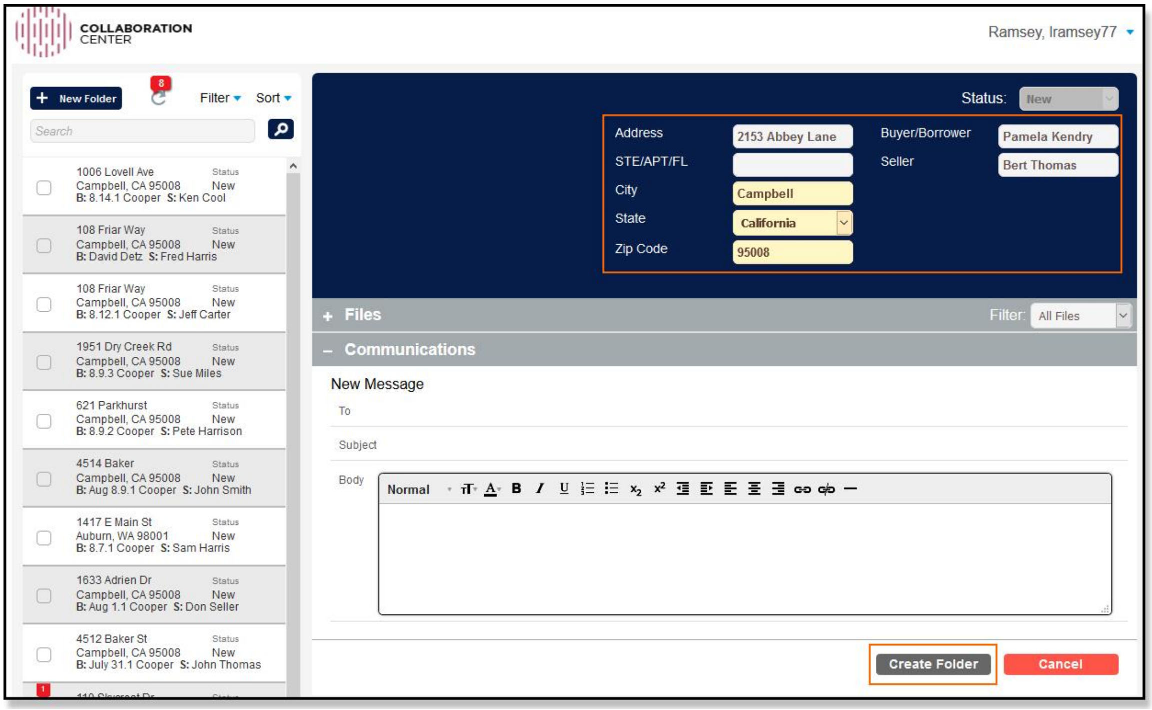
Follow these steps to open an Order with Stewart Title:

Steps

1. Start by creating a new folder. To do this, from the Home screen, click on **New Folder**.



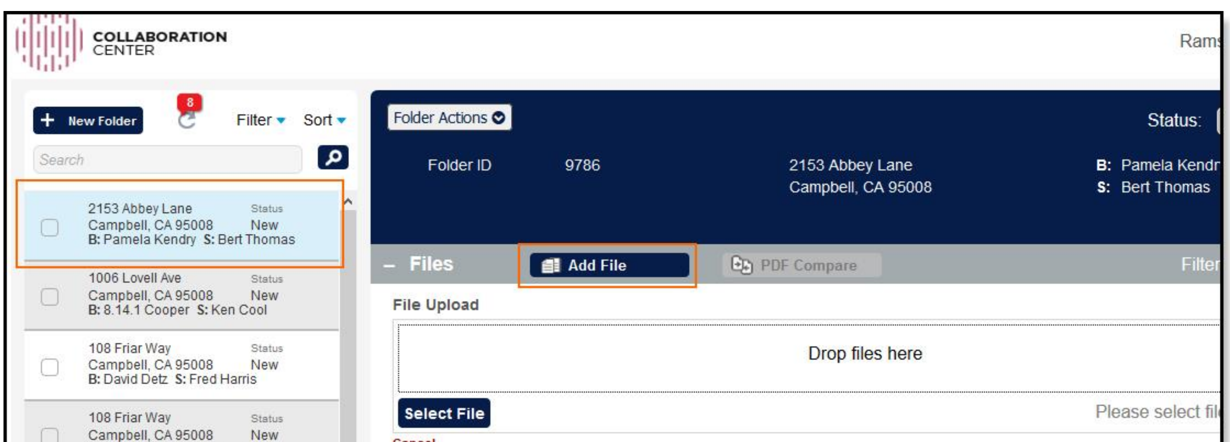
2. Complete these fields:



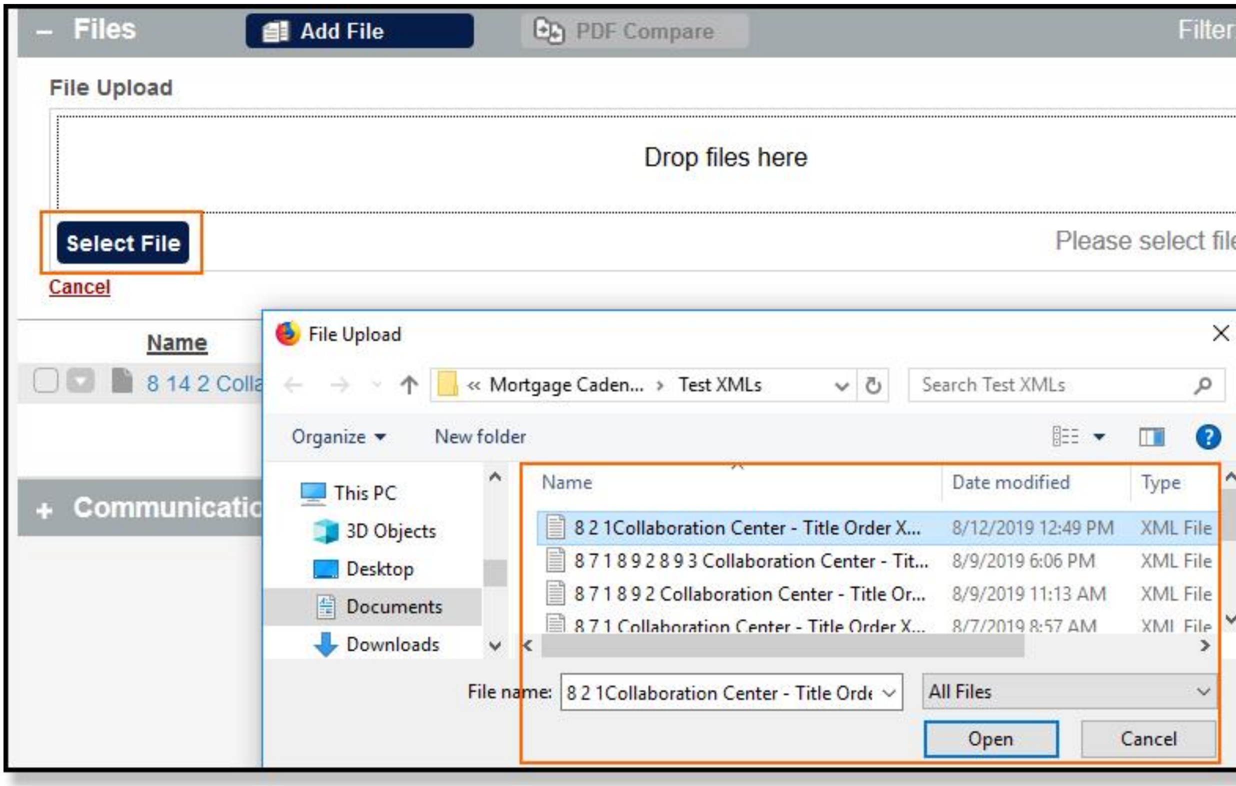
- **Property Address** in the *Address* field.
- **Buyer/Borrower's name** in the *Buyer/Borrower* field.
- **Seller's name** in the *Seller* field.
- **City** in the *City* field.
- Select the **State** from the *State* drop-down menu.
- **Zip Code** in the *Zip Code* field.

3. Once all information has been entered, click on **Create Folder**.

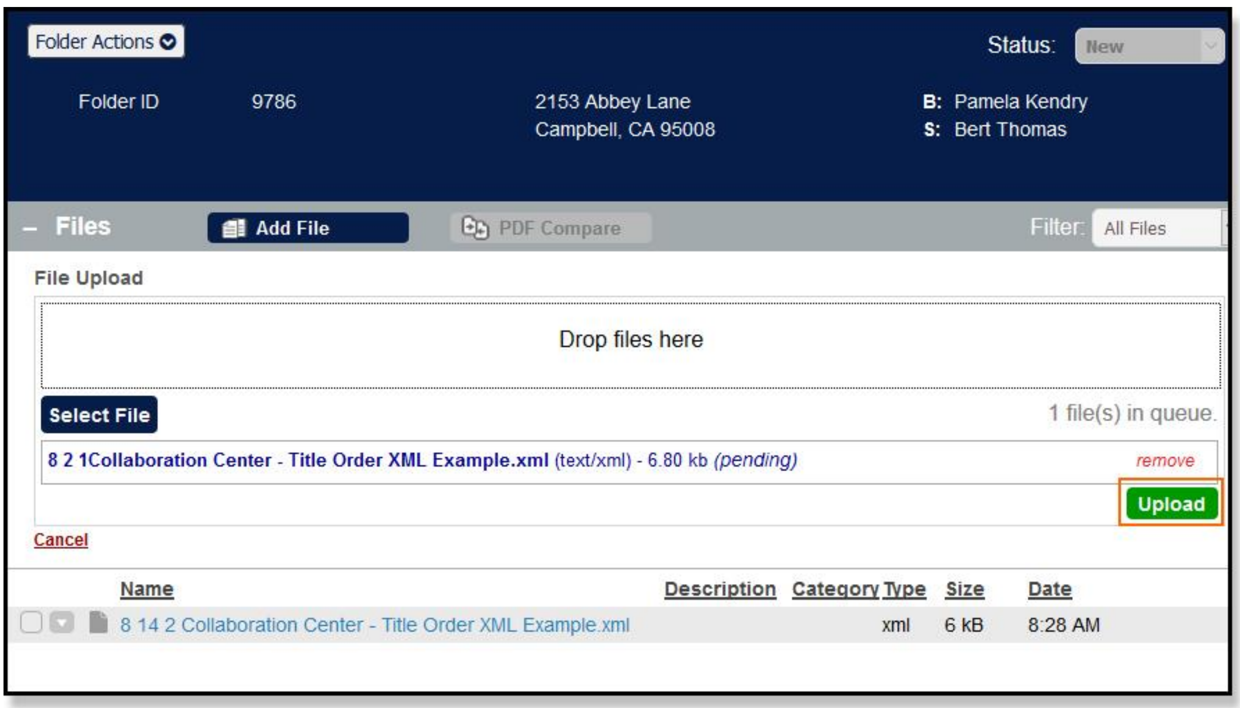
4. Next, add files or documents to the folder created. To do, simply select the folder from the left menu and click on **Add File**.



5. Click on **Select File** and select the **XML** file you want to upload.

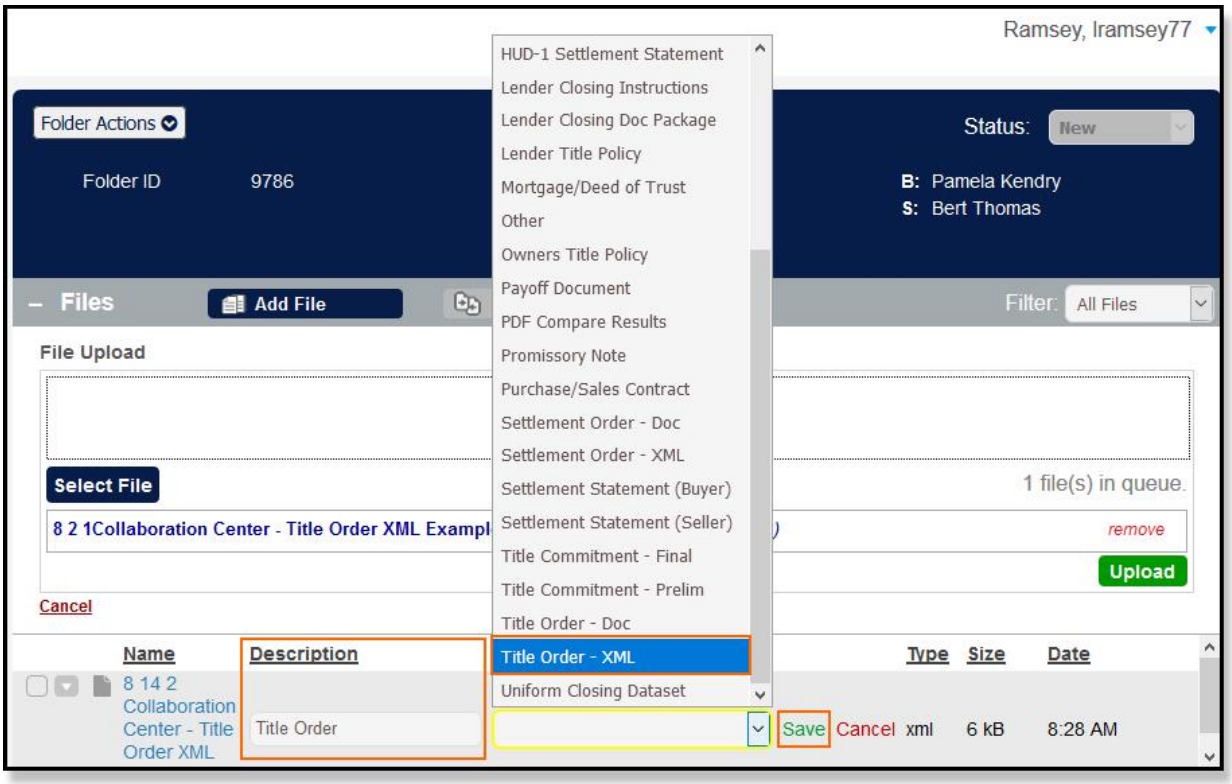


6. The file you selected display in the menu. Click on **Upload**. The file will show up in the lower menu.

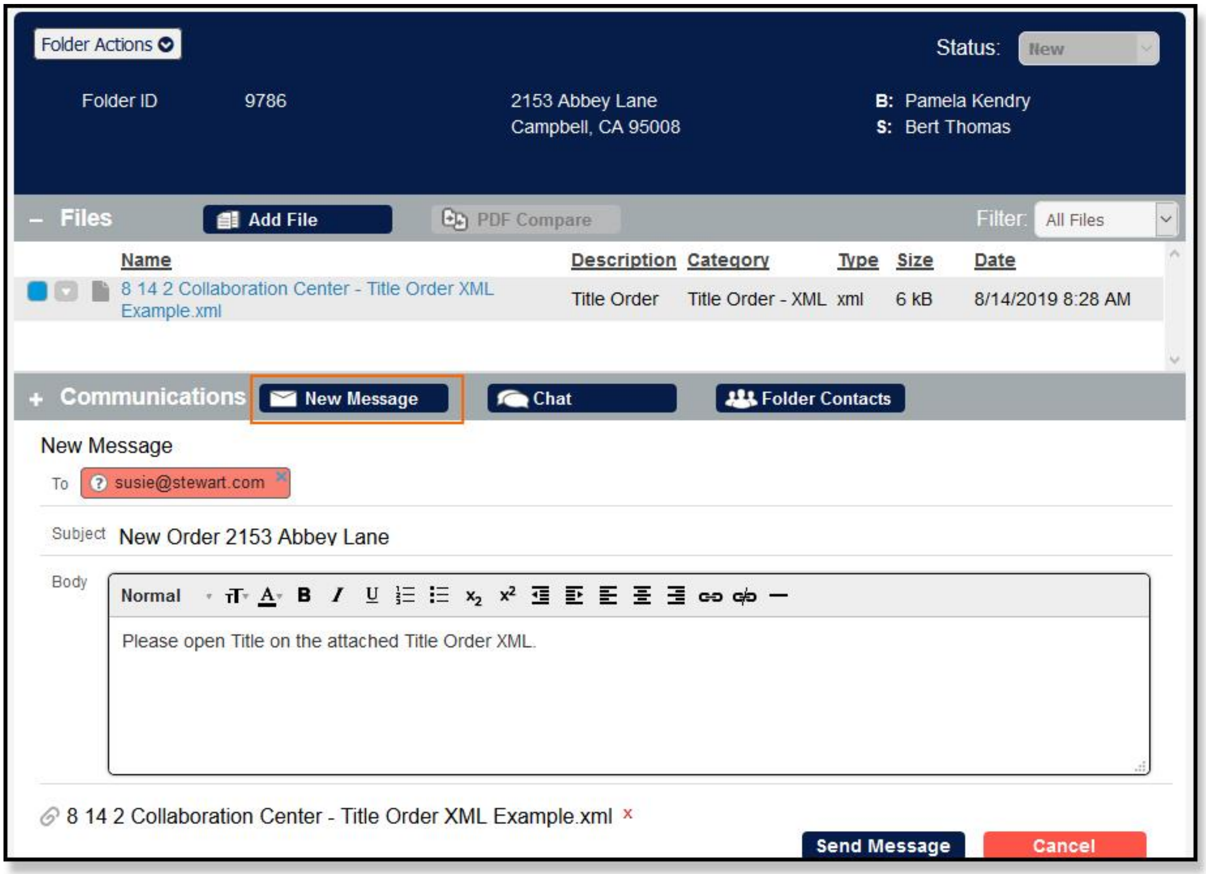


7. From the lower menu, click on the down-arrow button and select **Edit**.

8. In Edit, enter in the **Description** and select the **Category** as **Title Order – XML**. Only this category can be used and should always be selected each time opening an Order. To confirm, click on **Save**.



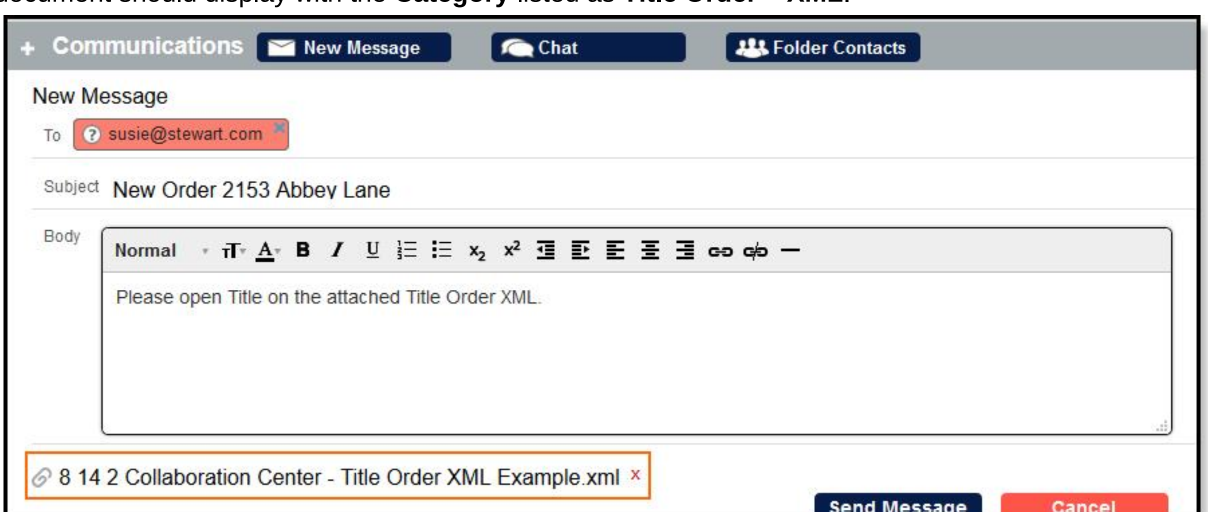
9. Now, the Order has been created and is ready to be sent to Stewart Title. To do this, click on **New Message** located next to the *Communications* heading.



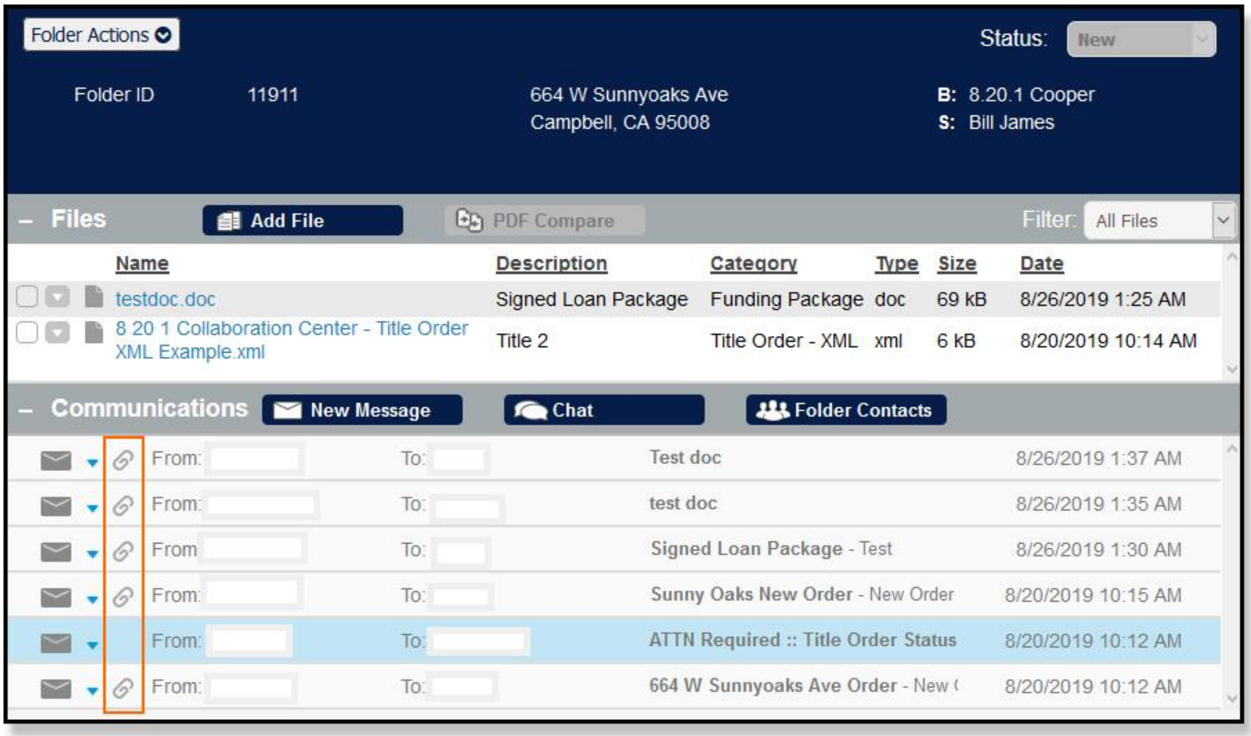
10. Compose the email. This includes adding a recipient with a *Stewart.com* **email address**, **email subject**, and the **email message** itself.

> **Note:** For **Stewart Centralized Title customers only**, please use this email address: ctstitleclosing@stewart.com to send order requests.

11. After your email is drafted, use the attach button to attach the file or document you wish to send. This file or document should display with the **Category** listed as **Title Order – XML**.



12. When finished, click on **Send Message** and your Order will be sent to Stewart Title.
13. You can communicate with Stewart using the **New Message** option. You can attach **Documents** to your messages.



We appreciate your business. We hope you find the integration with *Stewart Title Company* easy to use. For further assistance, contact Stewart Customer Care at 1.877.800.3132 or CustomerCare@stewart.com.