

# 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 <u>here</u>.

Compl Collab	ete this form to add a Lender Organization, Point of Co poration Center.	ntact, and Collaboration Center Org ID (if Available) for	Stewart setup with the
Addin In the t	ng a New Lender/Bank and Stewart Title Integrable below, please enter the fields below:	gration Access	
	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 acq lenderr	uire the <b>Stewart Title</b> integration access, please comple registration@stewart.com.	te this PDF form, <b>save</b> your changes on the PDF and er	nail it to

#### **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:

	COLLABORATION CENTER		Ramsey, Iramsey77 🔹
+ I Searc	New Folder 8 Filter - Sort -	Address 2153 Abbey Lane Buyer/Borrower	atus: New
0	1006 Lovell Ave Status Campbell, CA 95008 New B: 8.14.1 Cooper S: Ken Cool	STE/APT/FL Seller City Campbell	Bert Thomas
0	108 Friar Way Status Campbell, CA 95008 New B: David Detz S: Fred Harris	State California Y Zip Code 95008	
0	108 Friar Way Status Campbell, CA 95008 New B: 8.12.1 Cooper S: Jeff Carter	+ Files	Filter: All Files
0	1951 Dry Creek Rd Status Campbell, CA 95008 New B: 8.9.3 Cooper S: Sue Miles	- Communications New Message	
0	621 Parkhurst Status Campbell, CA 95008 New B: 8.9.2 Cooper S: Pete Harrison	To Subject	
0	4514 Baker Status Campbell, CA 95008 New B: Aug 8.9.1 Cooper S: John Smith	<sup>Body</sup> Normal · π· <u>A</u> ·B/U≣ ⊟ x₂ x² 理 판 판 표 Ξ σο φο —	
0	1417 E Main St Status Auburn, WA 98001 New B: 8.7.1 Cooper S: Sam Harris		
	1633 Adrien Dr Status Campbell, CA 95008 New B: Aug 1.1 Cooper S: Don Seller		
0	4512 Baker St Status Campbell, CA 95008 New B; July 31.1 Cooper S; John Thomas	Create Folde	Cancel
1	110 Playerent Dr. Claim		

- 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.

		COLLABORATION CENTER	4					Ram
6	- Ne	w Folder	Filter 🔻	Sort 🔻	Folder Actions 🛇			Status: (
s	earch	8		م	Folder ID	9786	2153 Abbey Lane Campbell, CA 95008	B: Pamela Kendr S: Bert Thomas
C		2153 Abbey Lane Campbell, CA 95008 B: Pamela Kendry S: B	Status New Bert Thomas					
<u> -</u>	_	1006 Lovell Ave	Status		– Files	Add File	PDF Compare	Filter
		Campbell, CA 95008 B: 8.14.1 Cooper S: K	New en Cool		File Upload			
0	<u>ן</u>	108 Friar Way Campbell, CA 95008 B: David Detz S: Fred	Status New Harris	1			Drop files here	
C		108 Friar Way Campbell, CA 95008	Status New		Select File Cancel			Please select file

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

– Files	Add File		DF Compare			Filter
File Upload						
			Drop files here			
Select File					Please	e select fil
Name 8 14 2 Colla	Sile Upload	« Mo	ortgage Caden→ Test XMLs	, to Se	earch Test XMLs	× م
	Organize 🔻 Ne	ew folde	ēr:			
+ Communicatic	<ul> <li>This PC</li> <li>3D Objects</li> <li>Desktop</li> <li>Documents</li> <li>Documents</li> </ul>	~	Name 8 2 1 Collaboration Center - Title ( 8 7 1 8 9 2 8 9 3 Collaboration Center 8 7 1 8 9 2 Collaboration Center - 8 7 1 Collaboration Center - Title	Order X nter - Tit Title Or Order X	Date modified 8/12/2019 12:49 PM 8/9/2019 6:06 PM 8/9/2019 11:13 AM 8/7/2019 8:57 AM	Type XML File XML File XML File XML File
		File na	ame: 8 2 1Collaboration Center - Title O	)rd€ ∼	All Files	√ Cancel

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

Folder Actions 🛇			Status: New 🗸
Folder ID	9786	2153 Abbey Lane Campbell, CA 95008	B: Pamela Kendry S: Bert Thomas
– Files	🗐 Add File	PDF Compare	Filter: All Files
File Upload			
		Drop files here	
Select File			1 file(s) in queue.
8 2 1Collaborati	on Center - Title Order X	KML Example.xml (text/xml) - 6.80 kb (pendir	ng) remove
Cancel			Upload
Name		Description	<u>Category Type</u> Size Date
8 14 2	Collaboration Center - Ti	itle Order XML Example.xml	xml 6 kB 8:28 AM

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

1	Name	Description Category Type	Size	Date	^
	8 14 2 Collaboration Center - Title Order XML Example.xml	xml	6 kB	8:28 AM	
Edit					
🖪 Send					X
📋 Delete	TIONS New Message Chat	Folder Contact	S		

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**.

							R	amse	y, Iramsey	77 -
Folder Actions ID 9786		HUD-1 Settlement Statement Lender Closing Instructions Lender Closing Doc Package Lender Title Policy Mortgage/Deed of Trust Other Owners Title Policy	^			<b>В</b> : Ра <b>S</b> : Ве	S: New > endry as			
– Files 🗐 Add	- Files Add File						F	ilter:	All Files	
Select File								1 file	e(s) in queue	Je.
8 2 1Collaboration Center - Title Order XML Exampl		Settlement Statement (Seller) Title Commitment - Final Title Commitment - Prelim Title Order - Doc	)						remove Upload	
Name Desc	ription	Title Order - XML				Type	Size	Da	ite	^
Collaboration		Uniform Closing Dataset	¥							
Center - Title Title Order XML	Order		~	Save	Cancel	xml	6 kB	8:2	28 AM	~

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.

Folder Ad	ctions 👁		Status: New ×	
Fol	Folder ID     9786     2153 Abbey Lane     B: Pamela Kendry       Campbell, CA 95008     S: Bert Thomas			
– Files	Add File	DF Compare	Filter: All Files	
	Name	Description Category	<u>Type</u> <u>Size</u> <u>Date</u>	
	8 14 2 Collaboration Center - Title C Example.xml	rder XML Title Order Title Order -	XML xml 6 kB 8/14/2019 8:28 AM	
+ Com	munications 💌 New Message	Chat III Ea	Ider Contacts	
Nous Ma				
New Me	eusia@etawart.com			
10	susie@stewart.com			
Subject	New Order 2153 Abbey Lane			
Body	Normal ∗ πT∗ <u>A</u> ∗ B <i>I</i> <u>U</u> }Ξ			
	Please open Title on the attached Ti	tle Order XML.		
l	2			
@ 8 14	2 Collaboration Center Title Ord	or YML Example yml X		
0 0 14		or Ame Example. Ami	Send Message Cancel	

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

Note: For <u>Stewart Centralized Title customers only</u>, please use this email address: <u>ctstitleclosing@stewart.com</u> 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**.

+ Con	nmunications 📉 New Message 🦳 Chat 👪 Folder Contacts								
New Message To vusie@stewart.com									
Subject	New Order 2153 Abbey Lane								
Body	Normal ∗ πT∗ <u>A</u> ∗ B / U ≟≣ ≔ x <sub>2</sub> x <sup>2</sup> ⊡ E E E E E co c¢o —								
	Please open Title on the attached Title Order XML.								
6 8 14	2 Collaboration Center - Title Order XML Example.xml × Send Message Cancel								

- 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.

Folder Actions  Folder ID 11911			i.	664 W Sunnyoaks Ave Campbell, CA 95008				Status: New Status: B: 8.20.1 Cooper S: Bill James			
– Files	3	🗐 Add I	File	) PDF Compare				Filter: All Files	~		
	Na	me		Description	Category	<u>Type</u>	Size	Date	^		
	tes	tdoc.doc	Contor Title Order	Signed Loan Packa	ge Funding Package	e doc	69 kB	8/26/2019 1:25 AM			
	8 Z XM	L Example.xml	Center - Title Order	Title 2	Title Order - XML	xml	6 kB	8/20/2019 10:14 AM	1		
– Com	mu	nications 💽	New Message	Chat	K Folder	Contact	s				
× •	6	From:	To:	Te	est doc			8/26/2019 1:37 AM	^		
<b></b>	6	From:	To:	te	st doc			8/26/2019 1:35 AM			
<b>~</b>	6	From	To:	Signed Loan Package - Test 8/26/2019 1:30 AM							
<b>~</b> •	6	From:	To:	Sunny Oaks New Order - New Order 8/20/2019 10:15 Al							
-		From:	To:	A	ITN Required :: Title O	rder Sta	atus	8/20/2019 10:12 AM			
	6	From:	To:	66	64 W Sunnyoaks Ave O	rder - N	ew (	8/20/2019 10:12 AM	~		

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 <u>CustomerCare@stewart.com</u>.