

# **Using Collaboration Center with Stewart Title**

User Guide  
*December 2024*



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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](#).



### 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](mailto:lenderregistration@stewart.com).

© 2020 Stewart. All rights reserved. | (800) STEWART | stewart.com | 9/4 Collaboration Center User Setup | Form

### *Browser Compatibility*

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

# Launching Collaboration Center

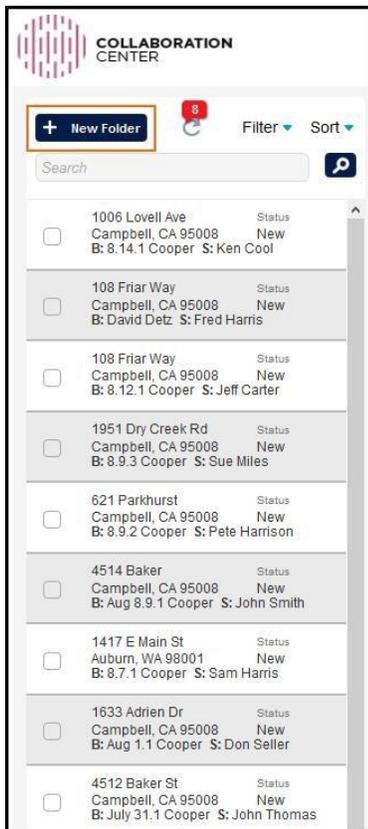
To get started, log into Collaboration Center with the credentials provided to you by the Collaboration Center team. Once logged in, you can open an Order with Stewart Title.

## Opening an Order with Stewart Title

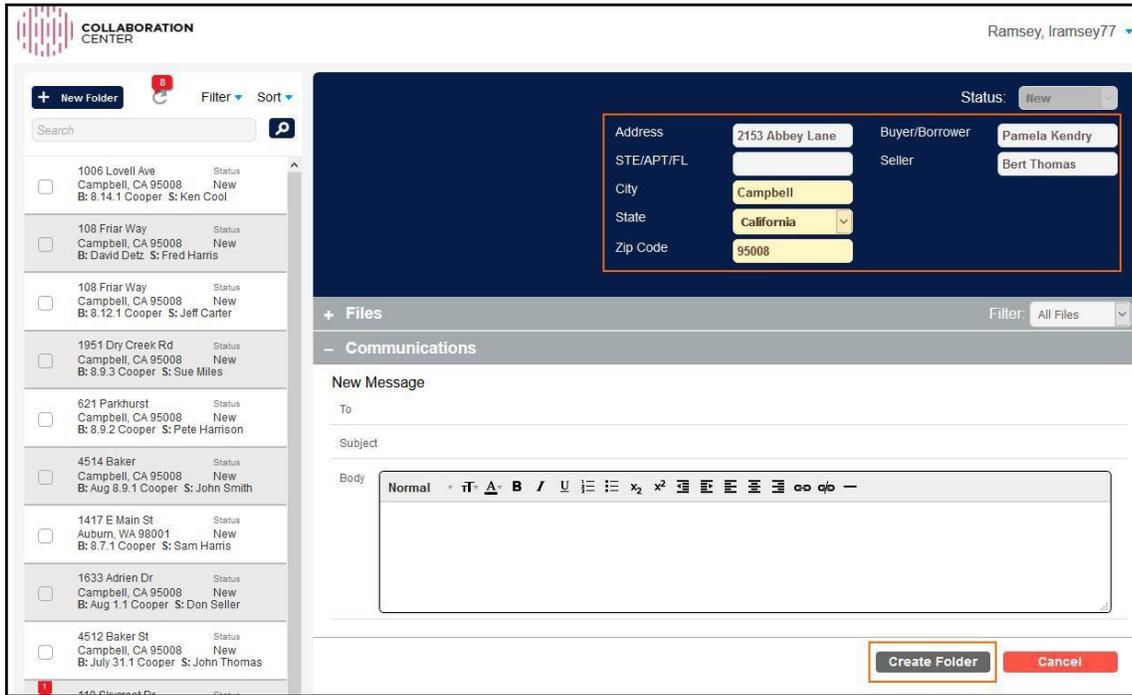
Follow these steps to open an Order with Stewart Title:

### Steps

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



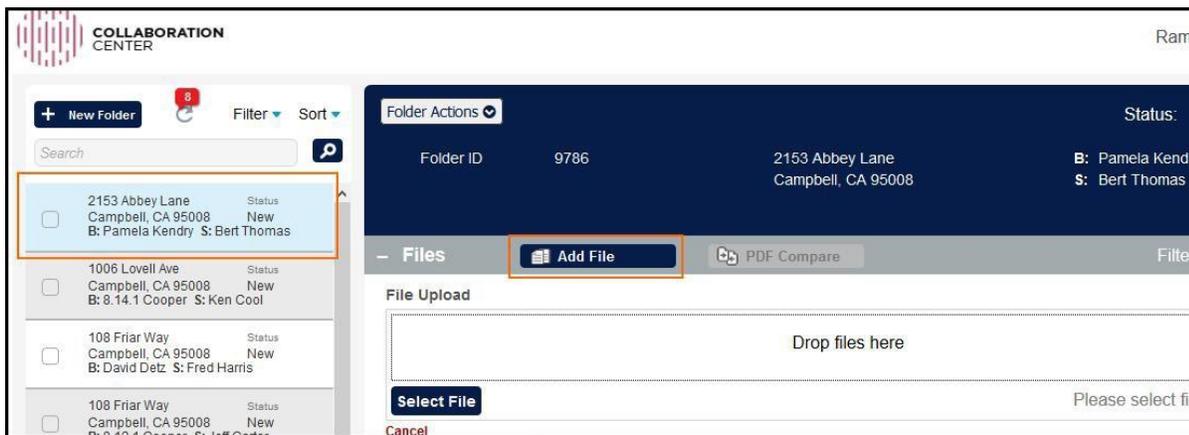
2. Complete these fields:



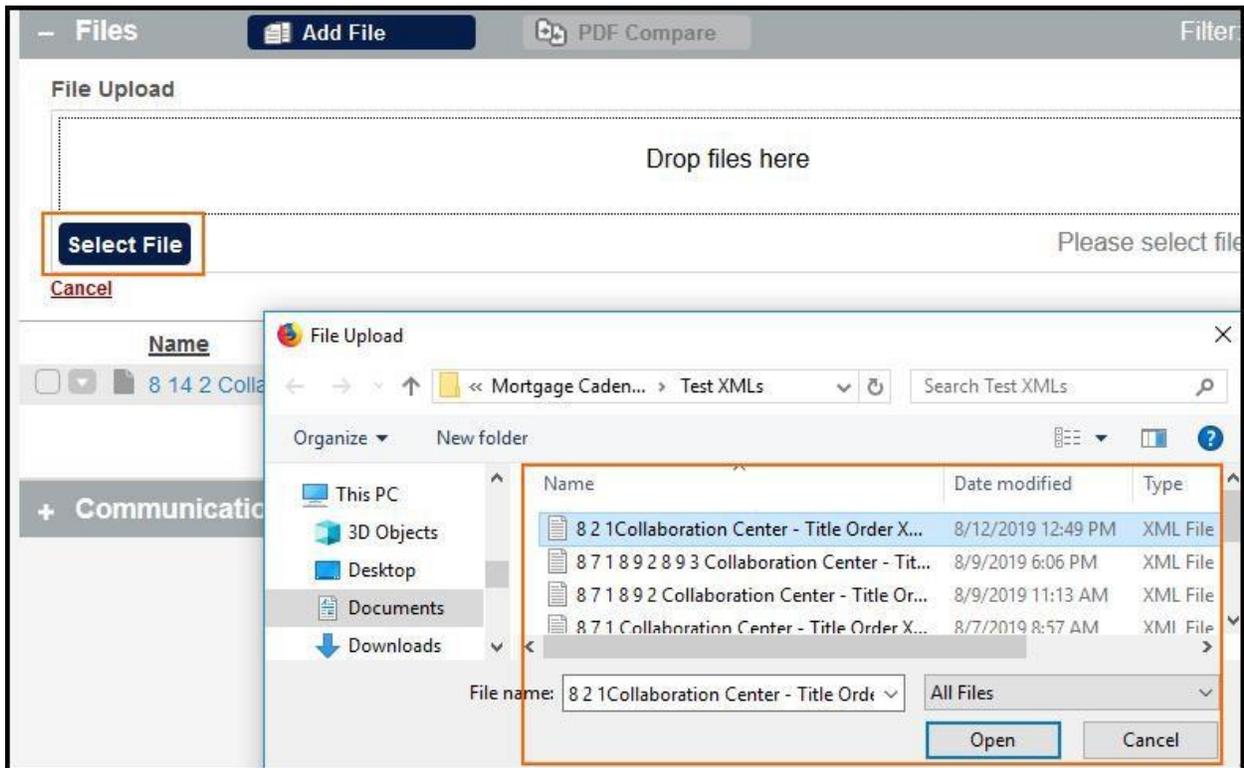
- **Property Address** in the *Address* field.
- **Buyer/Borrower's name** in the *Buyer/Borrower* field.
- **Seller's name** in the *Seller* field.
- **City** in the *City* field.
- Select the **State** from the *State* drop-down menu.
- **Zip Code** in the *Zip Code* field.

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

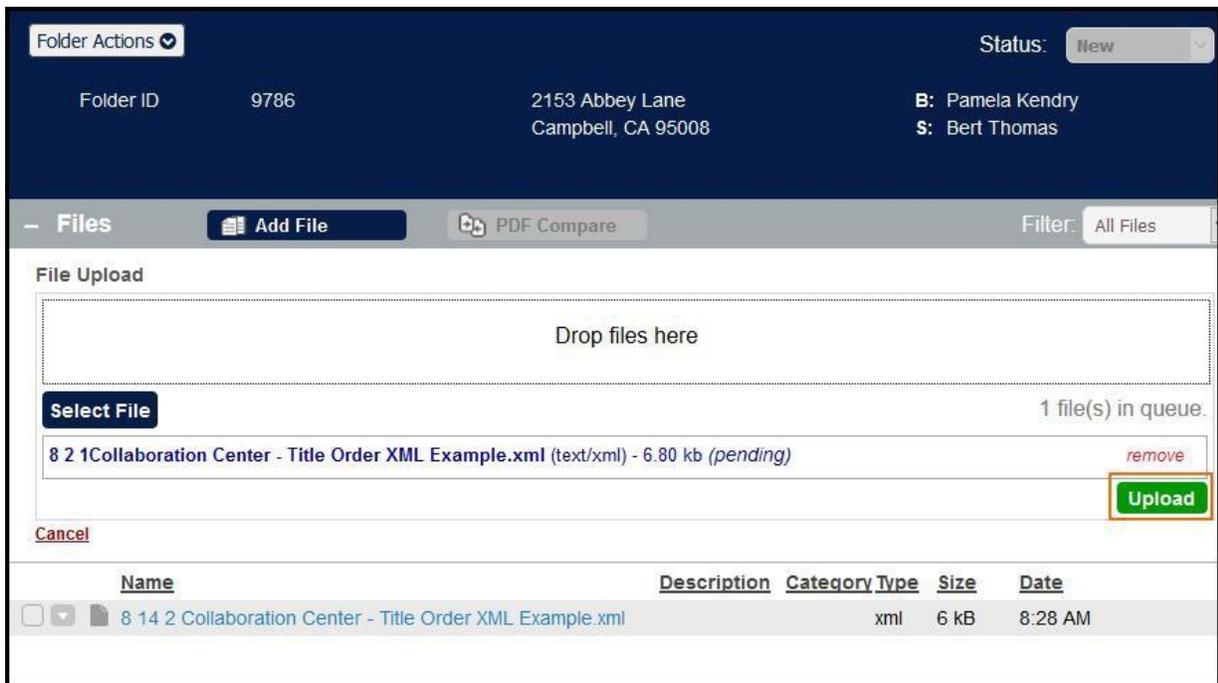
4. Next, add files or documents to the folder created. To do, simply select the folder from the left menu and click on **Add File**.



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



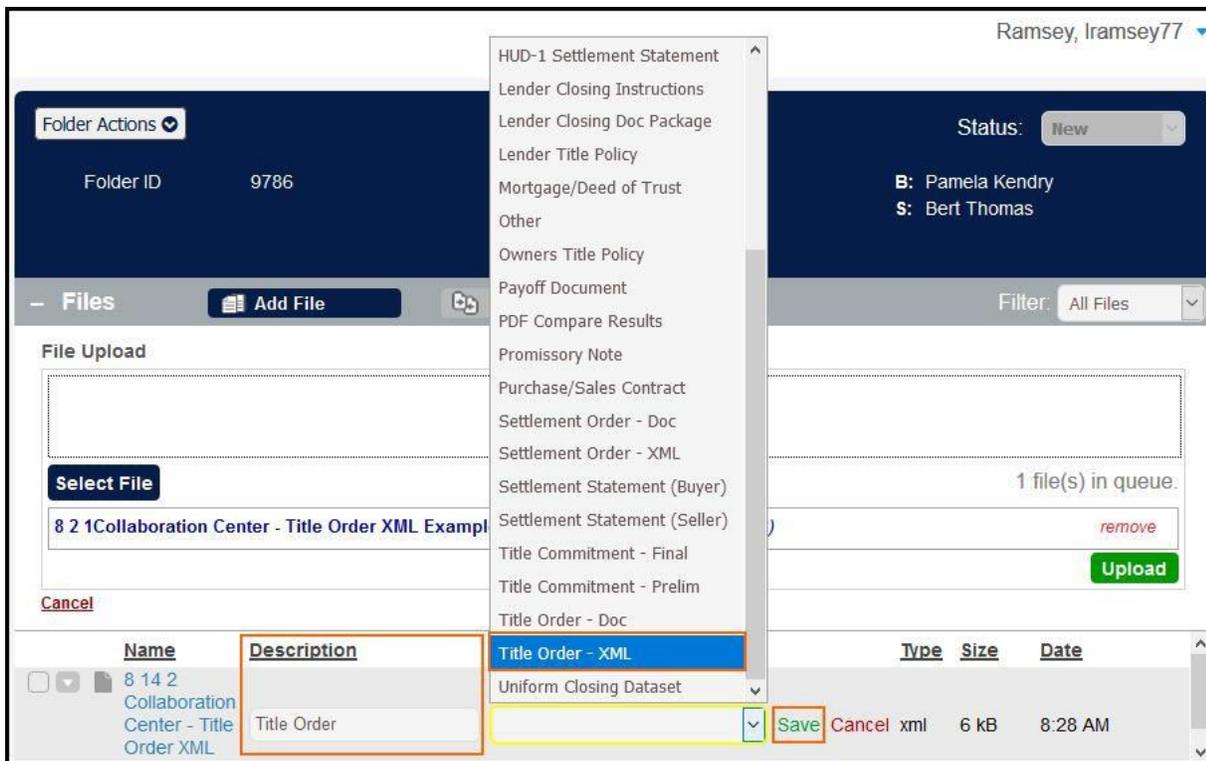
6. The file you selected display in the menu. Click on **Upload**. The file will show up in the lower menu.



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**.





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

664 W Sunnyoaks Ave  
Campbell, CA 95008

Status: New

**B:** 8.20.1 Cooper  
**S:** Bill James

---

**Files**

+ Add File PDF Compare

Filter: All Files ▼

Name	Description	Category	Type	Size	Date
<input type="checkbox"/> testdoc.doc	Signed Loan Package	Funding Package	doc	69 kB	8/26/2019 1:25 AM
<input type="checkbox"/> 8 20 1 Collaboration Center - Title Order XML Example.xml	Title 2	Title Order - XML	xml	6 kB	8/20/2019 10:14 AM

---

**Communications**

+ New Message Chat Folder Contacts

<input type="checkbox"/>		From: <input type="text"/>	To: <input type="text"/>	Test doc	8/26/2019 1:37 AM
<input type="checkbox"/>		From: <input type="text"/>	To: <input type="text"/>	test doc	8/26/2019 1:35 AM
<input type="checkbox"/>		From: <input type="text"/>	To: <input type="text"/>	Signed Loan Package - Test	8/26/2019 1:30 AM
<input type="checkbox"/>		From: <input type="text"/>	To: <input type="text"/>	Sunny Oaks New Order - New Order	8/20/2019 10:15 AM
<input type="checkbox"/>		From: <input type="text"/>	To: <input type="text"/>	ATTN Required :: Title Order Status	8/20/2019 10:12 AM
<input type="checkbox"/>		From: <input type="text"/>	To: <input type="text"/>	664 W Sunnyoaks Ave Order - New C	8/20/2019 10:12 AM

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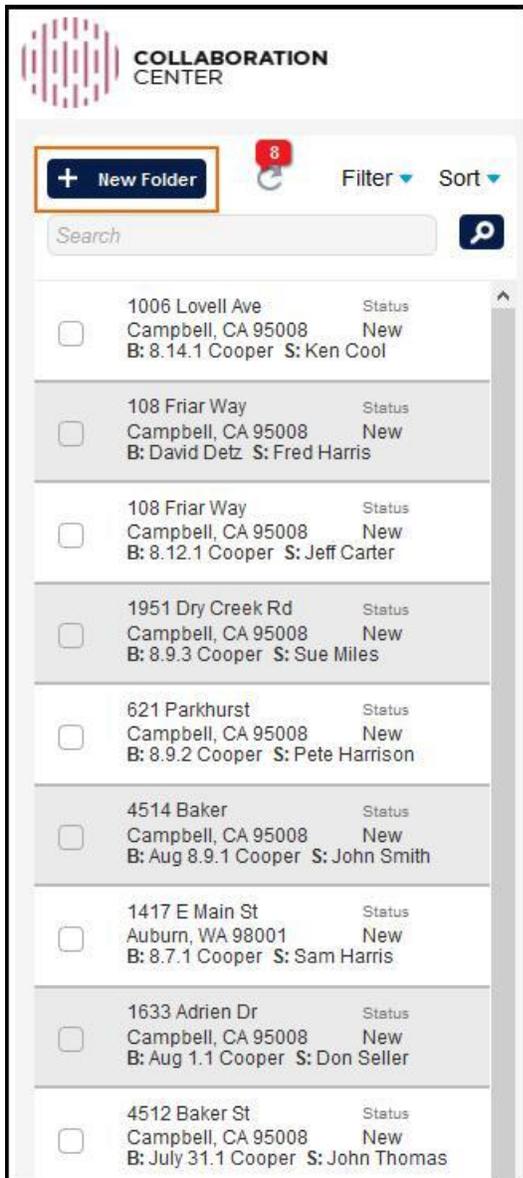
# Opening an Order with Stewart Title using Mortgage Cadence Order (API) for Title and Closing Order

Follow these steps to open an Order with Stewart Title using Mortgage Cadence Order (API):

Please place the **Title Order first**, follow up the **Closing Order**.

## Steps

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



2. Complete these fields:

The screenshot shows the 'COLLABORATION CENTER' interface. On the left is a sidebar with a 'New Folder' button and a list of existing folders. The main area contains a form for creating a new folder. The form has the following fields and values:

Field	Value
Address	2100 Bering Dr
STE/APT/FL	
City	Houston
State	Texas
Zip Code	77056
County	Harris
Buyer/Borrower	Hassan
Co-Borrower	Riad
Seller	

Below the form are sections for 'Files', 'Communications', and 'Orders'. The 'Create Folder' button is highlighted with a red box.

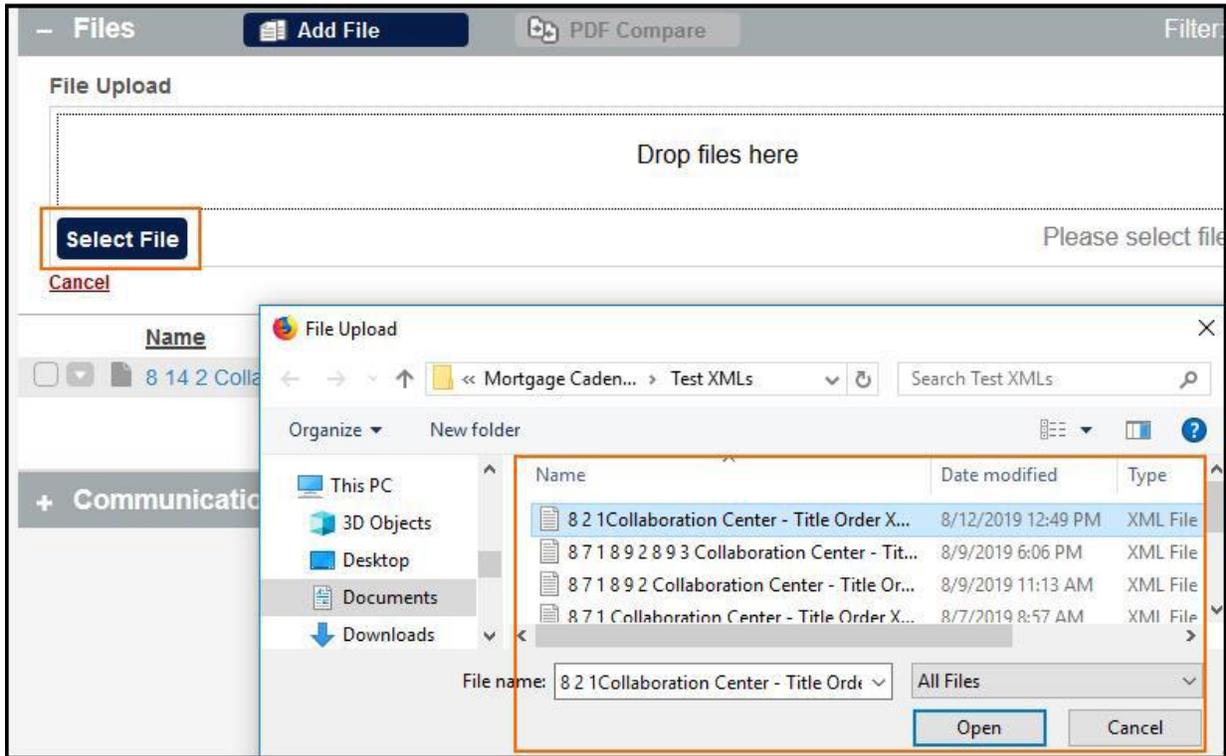
- **Property Address** in the *Address* field.
- **Buyer/Borrower's name** in the *Buyer/Borrower* field.
- **Seller's name** in the *Seller* field.
- **City** in the *City* field.
- Select the **State** from the *State* drop-down menu.
- **Zip Code** in the *Zip Code* field.

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

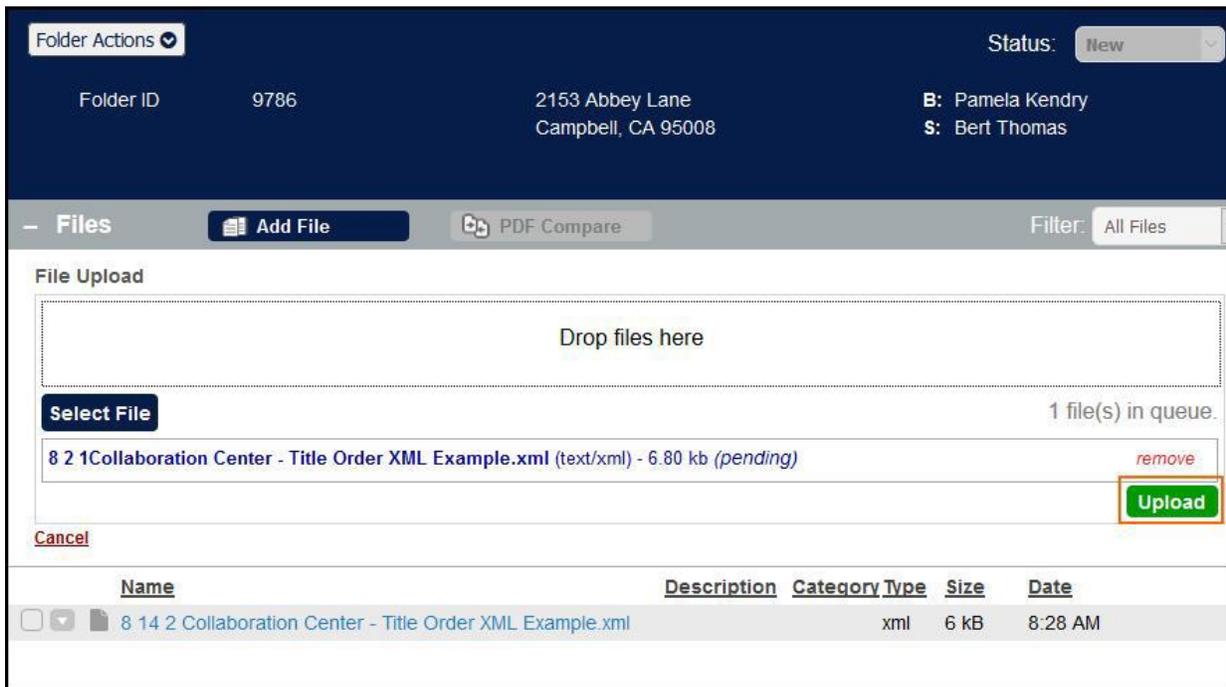
This screenshot is identical to the previous one, but the 'Create Folder' button is now highlighted with a red box, indicating it should be clicked.

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

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



- The file you selected is displayed in the menu. Click on **Upload**. The file will show up in the lower menu.

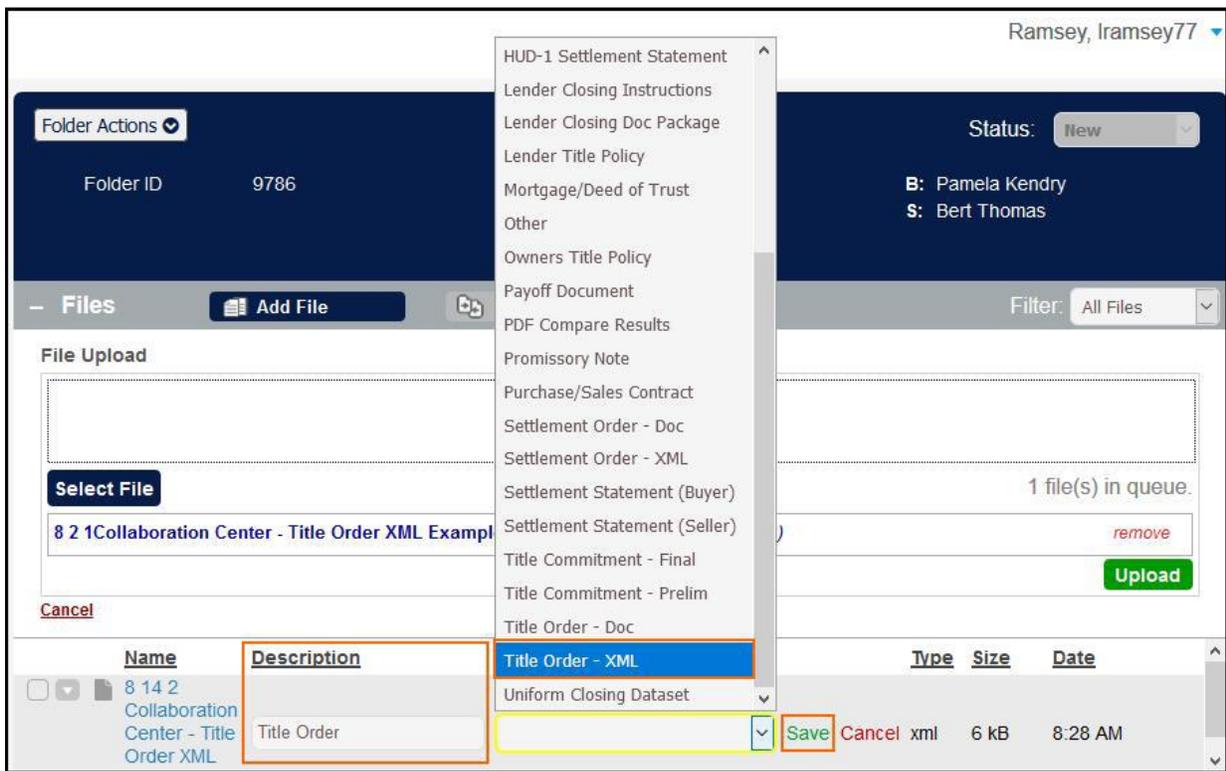


- From the lower menu, click on the down-arrow button and select **Edit**.



- 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**.

**Note:** While creating **Closing Order** if user select category other than Title Order – XML then the 'Title Order.xml' would not be available at Stewart end.



9. Click on **Create Order** button.

The screenshot shows the Collaboration Center interface. On the left, there is a folder view with a search bar and a list of folders. The main area on the right contains a form for creating an order. The form includes fields for Address (2100 Bering Dr), STE/APT/FL, City (Houston), State (Texas), Zip Code (77056), and County (Harris). There are also dropdown menus for Status (New) and Assigned To (Unassigned). Below the form, there are sections for Files, Communications, and Orders. The 'Create Order' button in the Orders section is highlighted with an orange box.

10. The **Order Services and Products** page will display.

The screenshot shows the 'Order Services and Products' page. At the top, it displays the 'Order For:' information: Folder ID: 67072, 2100 Bering Dr, Houston, TX 77056, and B: Hassan. Below this, there is a section with instructions: 'Create an order by selecting a category, choose an available provider, and then select the service and products. Orders will be sent to the email address the provider has on file. You can also send a copy of this order to a specific contact person's email address.' The page contains three dropdown menus: 'Select Loan Purpose' (Refinance), 'Select Category' (Select), and 'Select a Provider' (Select).

11. Select a *Loan Purpose, Category*, and then write **Stewart Title Company** as the *Provider*. Next, write **Stewart Title** for the branch location.

## Order Services and Products

---

**Order For:**  
Folder ID: 67072  
2100 Bering Dr  
Houston, TX 77056

B: Hassan

---

Create an order by selecting a category, choose an available provider, and then select the service and products. Orders will be sent to the email address the provider has on file. You can also send a copy of this order to a specific contact person's email address.

---

Select Loan Purpose

Refinance ▼

Select Category \*

Title and Closing Related Services ▼

Select a Provider \*

Stewart Title Company

Select a Branch Location \*

(683 mi) Stewart Centralized Title Services (National) - 500 North Broadway Suite 900 St. Louis, MO 63102

12. If a user would like to create **Title Order**, then select a product in the two categories.

Non-Insured Title:

### Non-Insured Title

---

Uninsured Home Equity

Property Report

Title and Escrow/Settlement:

### Title and Escrow/Settlement

---

Refinance

Purchase

Insured Home Equity

13. If a user would like to create a **Closing Order**, then select a product in the two categories.

Escrow/Settlement without Title:

The screenshot shows a form titled "Choose Product or Service" with a red asterisk. Below the title is the instruction "Select at least one product or service". Underneath, the category "Escrow/Settlement without Title" is listed. A box highlights two options: "Closing Only" with the subtext "Notary - No disbursement", and "Branch Banker Signing" with the subtext "Branch signing - with or without disbursement".

Title and Escrow/Settlement:

The screenshot shows a form titled "Title and Escrow/Settlement". A box highlights five options: "Refinance", "Purchase", "Insured Home Equity", "Closing Equity with Disbursements" (with subtext "Closing with disbursement (Branch or Notary)"), and "Closing Refi with Disbursements" (with subtext "Closing with disbursement (Branch or Notary)").

14. Provide the following information:

- Estimated Closing Date (Mandatory)
- Due Date (Optional)
- Contact Email Address (Optional)
- Comment (Optional)
- Attach File (Mandatory)

Estimated Closing Date \*

mm/dd/yyyy



Due Date

mm/dd/yyyy



Contact Email Address (optional) 

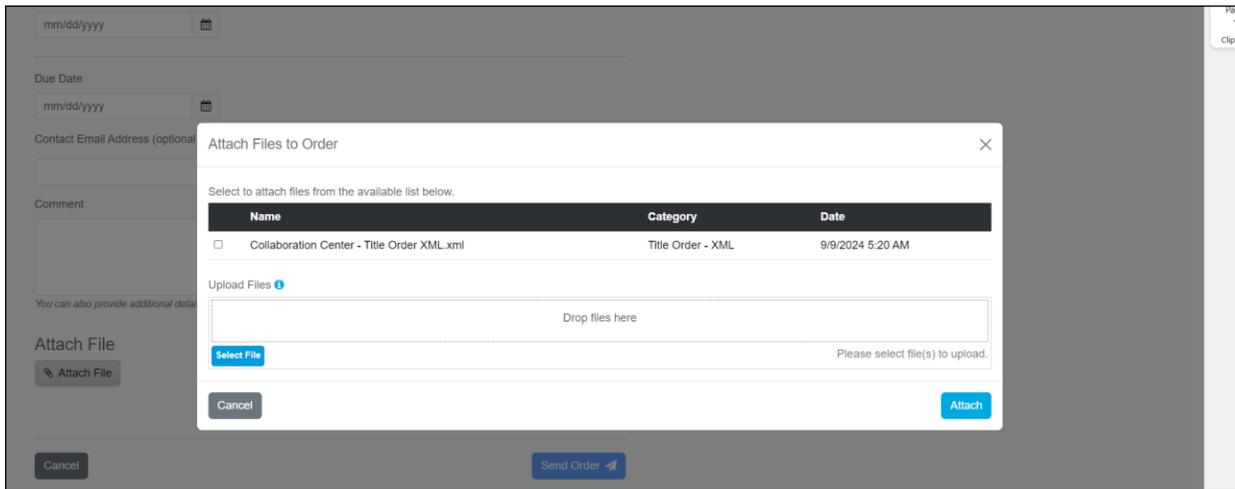
Comment

*You can also provide additional details here.*

Attach File

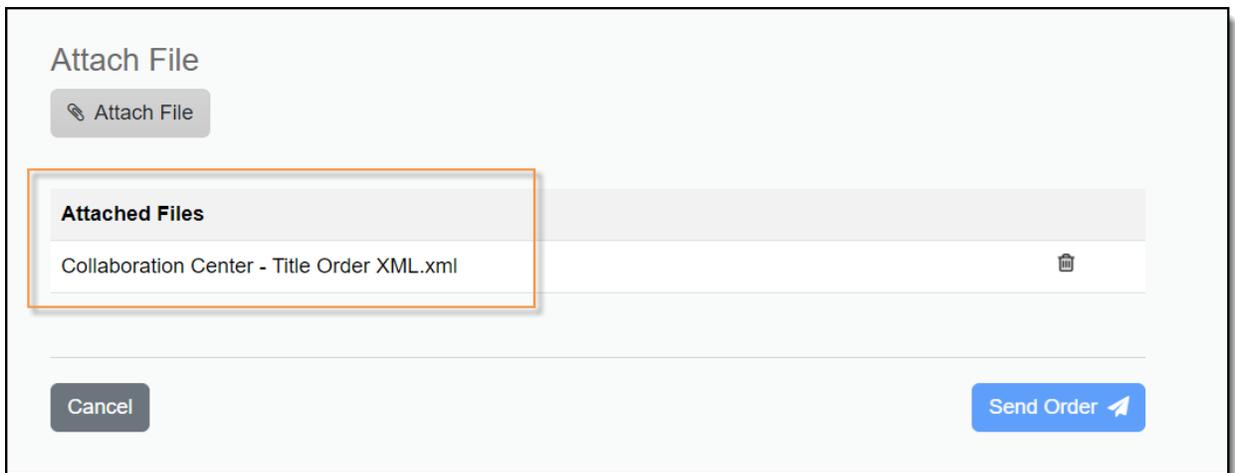
 Attach File

15. Clicking on **Attach file** will display the following pop-up window.

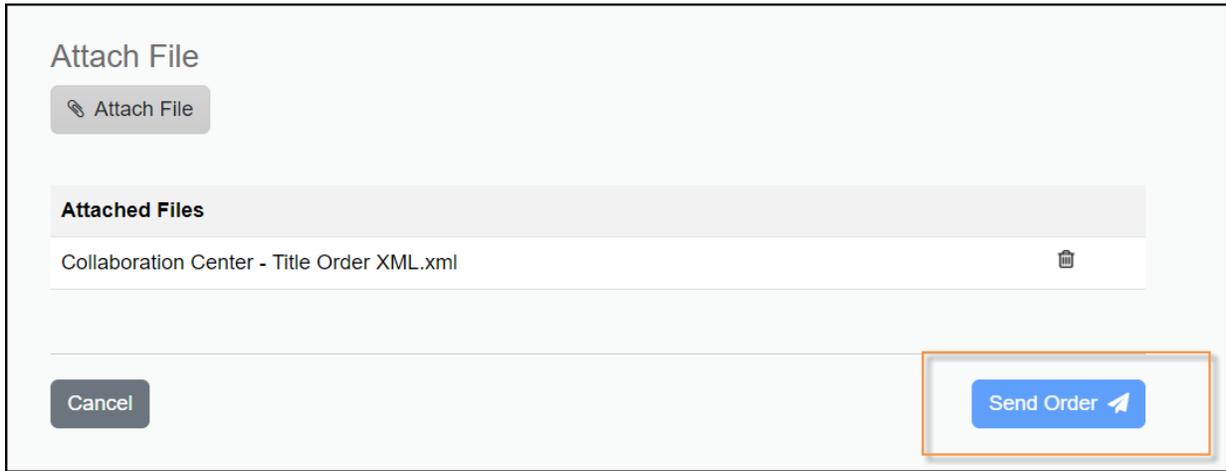


16. On this pop-up window, click **Select File** and choose your Title Order XML file. Finally, click **Attach**.

17. The uploaded file will be available under the **Attached File** section.



18. The order has been created and can be sent to Stewart Title by click **Send Order**.



The screenshot shows a dialog box titled "Attach File". At the top left, there is a button labeled "Attach File" with a paperclip icon. Below this is a section titled "Attached Files" which contains a single entry: "Collaboration Center - Title Order XML.xml" with a trash icon to its right. At the bottom left of the dialog is a "Cancel" button. At the bottom right is a blue "Send Order" button with a right-pointing arrow, which is highlighted by an orange rectangular box.

# Communicating with Stewart

You can communicate with Stewart Title by sending notes or documents.

## Using Notes

Notes can be sent from an open order:

### Steps

1. Open your order and click the **Update Order** button.

Provider **Stewart Centralized Title Services**  
(National)  
Order Date **9/9/2024**

---

Status Estimated Closing Date Due Date  
New

Reference # (optional)

Participants ⓘ  
MR Mohsin Rizwan SC Stewart PreProd Central Title Services

Comment

---

Attachments  
[Collaboration Center - Title Order XML 11.xml \(Desc\)](#)

Order History ▾

2. Type the message under **Comment** section.

Status: New

Estimated Closing Date: 9/9/2024

Due Date: mm/dd/yyyy

Reference # (optional)

Participants: MR Mohsin Rizwan, SC Stewart PreProd Central Title Services

**Comment**

Any update on this file

**Attachments**

Collaboration Center - Title Order XML 11.xml (Desc)

Attach File

Discard Changes

Send Update

3. Click **Send Update** to deliver a message to Stewart.

## Using Documents

You can also attach new documents to an open order and send them to Stewart Title.

### Steps

1. Open your order and upload your document.
2. Click the uploaded document to provide a **Description** and **Category** and click **Save**.

The screenshot displays the Stewart Title interface for document management. At the top, there are fields for Folder Actions, Status (New), and Assigned To (Unassigned). Below this, metadata is shown: Folder ID (67075), Date Created (9/9/2024 6:09 AM), Address (3060 Muns St, Houston, TX 77056), Buyer/Borrower (BB), Co-Borrower (CB), and Seller (SLR). The main section is titled 'Files' and includes an 'Add File' button and a 'Filter: All Files' dropdown. A 'File Upload' area contains a 'Drop files here' box, a 'Select File' button, and a 'Cancel' link. Below the upload area, there is a checkbox for 'Share Files'. A table lists the uploaded files:

Name	Description	Category	Type	Size	Date
Test1.pdf	Document	Affidavit	pdf	33KB	6:48 AM
Collaboration Center - Title Order XML 11.xml	Desc	Title Order - XML	xml	6KB	6:10 AM

Below the table, there are buttons for 'Communications' (New Message, Chat, Folder Contacts) and 'Orders' (Create Order). At the bottom, a message header shows 'From: Mohsin To: Stewart PreProd Order Request 36206 - Title and Escrow/Settlement - Requesting order for Title and Escr 6:11 AM'. A table at the very bottom lists order details:

Service Name	Provider	Order ID	Status	Last Status Update	Actions
Title and Escrow/Settlement	Stewart Centralized Title Services (National)	36206	New	9/9/2024 6:11 AM	[Envelope icon] [Pencil icon]

3. Click the pencil icon to **Edit**.

This screenshot is identical to the previous one, but it highlights the 'Actions' column in the bottom table, specifically the pencil icon used for editing the order details.

4. Click the **Update Order** button.

Provider **Stewart Centralized Title Services**  
(National)  
Order Date **9/9/2024**

---

Status Estimated Closing Date Due Date  
New

Reference # (optional)

Participants ?

Comment

---

Attachments  
[Collaboration Center - Title Order XML 11.xml \(Desc\)](#)

Order History

5. Check the checkbox of the file you uploaded and click **Attach**.

Attach Files to Order ✕

Select to attach files from the available list below.

Name	Category	Date
<input checked="" type="checkbox"/> Test1.pdf	Affidavit	9/9/2024 6:48 AM
<input type="checkbox"/> Collaboration Center - Title Order XML 11.xml	Title Order - XML	9/9/2024 6:10 AM

Upload Files [?](#)

Drop files here

[Select File](#) Please select file(s) to upload.

[Cancel](#) [Attach](#)

6. The file will be available in the **Attached Files** section. Click **Send Update**.

Comment

---

**Attachments**

[Collaboration Center - Title Order XML 11.xml \(Desc\)](#)

**Attached Files**

Test1.pdf 🗑️

[Attach File](#)

---

[Discard Changes](#) [Send Update](#)

7. Document will be delivered to Stewart Title.

# Status in Mortgage Cadence:

A user will see the following statuses when there are updates made to the file:

- When the order is placed, it appears as **New**.

The screenshot shows a user interface for mortgage management. At the top, there are fields for 'Folder Actions', 'Status: New', and 'Assigned To: Unassigned'. Below this, there is a summary section with the following information:

- Folder ID: 67231
- Date Created: 9/11/2024 1:50 PM
- Address: 2100 Bering Dr, Houston, TX 77056, Harris County
- Buyer/Borrower: Hassan
- Co-Borrower: Riaz

The interface is divided into several sections:

- Files:** Contains a table with one file: 'Collaboration Center - Title Order XML.xml' (Test, Title Order - XML, xml, 6KB, 1:51 PM).
- Communications:** Shows a message from Hassan to Stewart PreProd regarding 'Order Request 36334 - Title and Escrow/Settlement - Requesting order for Title and Escr' at 1:52 PM.
- Orders:** Contains a table with one order:

Service Name	Provider	Order ID	Status	Last Status Update	Actions
Title and Escrow/Settlement	Stewart Centralized Title Services (National)	36334	New	9/11/2024 1:52 PM	[Envelope icon] [Pencil icon]

- When the order is accepted, it appears as **In Progress**.
- The **closing order** is auto accepted so it will appear as New and update quickly to In Progress.

This screenshot is similar to the first one, but the 'Status' of the order is now 'In Progress' and the 'Last Status Update' is '9/11/2024 2:00 PM'. The 'Communications' section now includes an 'Order Update' message from Stewart Title Compar to Hassan, Stewart PrePro at 2:00 PM.

Service Name	Provider	Order ID	Status	Last Status Update	Actions
Title and Escrow/Settlement	Stewart Centralized Title Services (National)	36334	In Progress	9/11/2024 2:00 PM	[Envelope icon] [Pencil icon]

- When the closing is complete, it appears as **Completed**.

The screenshot displays the Stewart Title software interface. At the top, there are fields for 'Folder Actions', 'Status: New', and 'Assigned To: Unassigned'. Below this, metadata is shown: Folder ID: 67231, Date Created: 9/11/2024 1:50 PM, Address: 2100 Bering Dr, City/State/Zip: Houston, TX 77056, County: Harris, Buyer/Borrower: Hassan, and Co-Borrower: Riaz.

The 'Files' section contains one file: 'Collaboration Center - Title Order XML.xml' with a description of 'Test', category 'Title Order - XML', type 'xml', size '6KB', and date '1:51 PM'.

The 'Communications' section shows three messages:
 

- From: Stewart Title Compar To: Hassan, Stewart PrePro Order Update 36334 - Title and Escrow/Settlement - Title and Escrow/Settlement Order 36334 2:02 PM
- From: Stewart Title Compar To: Hassan, Stewart PrePro Order Update 36334 - Title and Escrow/Settlement - Title and Escrow/Settlement Order 36334 2:00 PM
- From: Hassan To: Stewart PreProd Order Request 36334 - Title and Escrow/Settlement - Requesting order for Title and Escrow 1:52 PM

The 'Orders' section features a table with the following data:

Service Name	Provider	Order ID	Status	Last Status Update	Actions
Title and Escrow/Settlement	Stewart Centralized Title Services (National)	36334	Completed	9/11/2024 2:02 PM	[Envelope icon] [Pencil icon]

- When the file is closed, it appears as **Closed**.

This screenshot is identical to the one above, showing the same metadata, files, and communications. The primary difference is in the 'Orders' table, where the status of the order is now 'Closed' and the 'Last Status Update' is '9/11/2024 2:04 PM'.

Service Name	Provider	Order ID	Status	Last Status Update	Actions
Title and Escrow/Settlement	Stewart Centralized Title Services (National)	36334	Closed	9/11/2024 2:04 PM	[Envelope icon] [Pencil icon]

- When the order is cancelled, it appears as **Cancelled**.

The screenshot displays the Collaboration Center interface for a folder with ID 67231, created on 9/11/2024 at 1:50 PM. The address is 2100 Bering Dr, Houston, TX 77056, Harris County. The buyer/borrower is Hassan, and the co-borrower is Riaz. The status is set to 'New' and assigned to 'Unassigned'.

**Files:** A table with columns Name, Description, Category, Type, Size, and Date. One file is listed: 'Collaboration Center - Title Order XML.xml' with a description of 'Test', category 'Title Order - XML', type 'xml', size '6KB', and date '1:51 PM'.

**Communications:** A list of messages. The most recent is from Stewart Title Compar to Hassan, Stewart PrePro, dated 2:04 PM, with the subject 'Order Update 36334 - Title and Escrow/Settlement - Title and Escrow/Settlement Order 36334'.

**Orders:** A table with columns Service Name, Provider, Order ID, Status, Last Status Update, and Actions. One order is listed: 'Title and Escrow/Settlement' provided by 'Stewart Centralized Title Services (National)' with Order ID '36334'. The status is 'Cancelled' (highlighted in red), and the last status update is '9/11/2024 2:07 PM'.

- When a user attempts to place an order with a lender that is not set up with Stewart, the status message will display **Onboarding Required**.

The screenshot displays the Collaboration Center interface for a folder with ID 66633, created on 8/20/2024 at 5:05 PM. The address is 4811 Essex Ln, Houston, TX 77027, Harris County. The buyer/borrower is Vishal, the co-borrower is D, and the seller is K. The status is set to 'New' and assigned to 'Unassigned'.

**Files:** A table with columns Name, Description, Category, Type, Size, and Date. One file is listed: 'Collaboration Center - Title Order XML.xml' with a description of 'Desc', category 'Title Order - XML', type 'xml', size '6KB', and date '5:07 PM'.

**Communications:** A list of messages. The most recent is from Stewart Title Compar to Vishal, Stewart PrePro, dated 5:40 PM, with the subject 'Order Update 35926 - Non-Insured Title - Non-Insured Title Order 35926 has been updated: Status updated to - Onboarding Required Comment Added (see below) This ORG ID 20 need to be Onboard'.

**Orders:** A table with columns Service Name, Provider, Order ID, Status, Last Status Update, and Actions. One order is listed: 'Non-Insured Title' provided by 'Stewart Centralized Title Services (National)' with Order ID '35926'. The status is 'Onboarding Required' (highlighted in orange), and the last status update is '8/20/2024 5:50 PM'.

## Further Assistance

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](mailto:CustomerCare@stewart.com).