

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 <u>here</u>.

		tewart
Collaboration Center User Setup Fo	rm for Lenders	
Complete this form to add a Lender Organization, Point of Collaboration Center.	Contact, and Collaboration Center Org ID (if Available) for S	Stewart setup with the
Adding a New Lender/Bank and Stewart Title In In the table below, please enter the fields below:	tegration 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 acquire the Stewart Title integration access, please com lenderregistration@stewart.com.	plete this PDF form, save your changes on the PDF and ema	iil it to
© 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:

	COLLABORATION		Ramsey, Iramsey77 🔻
(+ N	lew Folder Filter 🔹 Sort 🔹	SI	atus: New 🗸
Searc	sh 📃 🔎	Address 2153 Abbey Lane Buyer/Borrower	Pamela Kendry
0	1006 Lovell Ave Status Campbell, CA 95008 New B: 8.14.1 Cooper St Ken Cool	STE/APT/FL Seller City <mark>Campbell</mark>	Bert Thomas
0	108 Friar Way Status Campbell, CA 95008 New B: David Detz S: Fred Harris	State California V 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	
	4514 Baker Status Campbell, CA 95008 New B: Aug 8.9.1 Cooper S: John Smith	Body Normal ∗ πT∗ <u>A</u> ∗ B/ 및 注⊟ x₂ x² 强 판 판 표 Ξ co qo —	
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		, li
0	4512 Baker St Status Campbell, CA 95008 New B: July 31.1 Cooper S; John Thomas	Create Folder	Cancel
1	110 Classreet Dr. Classe		

- **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					Ram
+ •	lew Folder Pilter	 Sort - 	Folder Actions 🛇			Status:
Searc	sh	2	Folder ID	9786	2153 Abbey Lane	B: Pamela Kendr
0	2153 Abbey Lane Stal Campbell, CA 95008 Ner B: Pamela Kendry S: Bert Tho	v nas			Campuen, CA 95000	3. Den Hiumas
L	1006 Lovell Ave Stat	us	– Files	Add File	PDF Compare	Filter
	Campbell, CA 95008 Net B: 8.14.1 Cooper S: Ken Cool	V	File Upload			
	108 Friar Way Stai Campbell, CA 95008 Ne B: David Detz S: Fred Harris	us V			Drop files here	
0	108 Friar Way Stal Campbell, CA 95008 Net Pt 8 12 1 Connets St. Leff Contex	us V	Select File Cancel			Please select file

- Files	🗐 Add File	PDF Compare		Filte
File Upload				
		Drop files he	re	
Select File			Plea	se select fi
Name		« Mortgage Caden » Test XMLs	✓ Õ Search Test XMLs	< م
	Organize 🔻 Ne	w folder		
Communicat	This PC	Name 8 2 1 Collaboration Center 8 7 1 8 9 2 8 9 3 Collaboration C 8 7 1 8 9 2 Collaboration C	Date modified - Title Order X 8/12/2019 12:49 PM ion Center - Tit 8/9/2019 6:06 PM enter - Title Or 8/9/2019 11:13 AM	Type XML File XML File XML File
	🖶 Downloads	File name: 8 2 1 Collaboration Center	Title Order X 8///2019 8:57 AM	Cancel

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.

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 1Collaboratio	on Center - Title Order	XML Example.xml (text/xml) - 6.80 kb (pending)	remove								
Cancel			Upload								
Name		Description 0	Category Type Size Date								
8 14 2 0	Collaboration Center - T	Fitle Order XML Example.xml	xml 6 kB 8:28 AM								

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**.

		Ramsey, Iramsey77 🔻
Folder Actions 🛇 Folder ID 9786	HUD-1 Settlement Statement Lender Closing Instructions Lender Closing Doc Package Lender Title Policy Mortgage/Deed of Trust Other	A Status: New Status: B: Pamela Kendry S: Bert Thomas
 Files Add File File Upload Select File 8 2 1Collaboration Center - Title Order XML Example 	Payoff Document PDF Compare Results Promissory Note Purchase/Sales Contract Settlement Order - Doc Settlement Order - XML Settlement Statement (Buyer) Settlement Statement (Seller) Title Commitment - Final	Filter: All Files
Cancel	Title Commitment - Prelim Title Order - Doc	
Name Description 8 14 2 Collaboration Center - Title Order Title Order	Title Order - XML Uniform Closing Dataset	Type Size Date Save Cancel xml 6 kB 8:28 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 A	ctions 오 der ID	9786	2153 Camp	Abbey Lane bell, CA 95008	Status: Hew Status: St					
– Files		Add File	D PDF Com	pare				Filter:	All Files	~
	Name			Description	Category	Type	Size	Date		^
	8 14 2 Co	llaboration Center - 7	Title Order XML	Title Order	Title Order - XML	xml	6 kB	8/14/20	19 8:2 <mark>8 A</mark> M	
	Example.x									
+ Com New Me To ? Subject	susie@stev	vart.com	ie	at	H Folder C	Contacts				_
Body	Normal	∗ д ∗В/ <u>Ч</u>	∐ }≣ I ≣ x ₂ x ² ⊡	DEX:	∎ e∋ e⁄∋ —					
	Please op	pen Title on the attacl	ned Title Order XML.							
@ 8 14	2 Collabo	ration Center - Title	e Order XML Examp	le.xml ×	s	end M	essage		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**.

+ Com	nmunicati	ions 盾	New	/ Messag	e		Chat				😃 Foldei	Contacts	ĺ.			
New M To ?	essage susie@stew	vart.com	Abbey	Lane												
Body	Normal Please op	∗ π ∗ <u>A</u> ∗ en Title o	B A	Y <u>U</u> }∃	E IE →	4₂ x² der XMI	3 I	ŒE	Ξ:	- GO	¢ –					
6 8 14	2 Collabo	ration Ce	enter -	Title Or	der XN	IL Exa	ample).xml	x		8	Send Mes	sage	с	ancei	

- 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 /	Action	s 🛇					S	tatus: New	
Folder ID 11911				664 W Sunny Campbell, CA	B: 8.20.1 Cooper S: Bill James				
– File	s	🗐 Add F	File 🕞	PDF Compare				Filter: All Files	<
	Na	me		Description	Category	Type	Size	Date	^
	tes	tdoc.doc		Signed Loan Pac	kage Funding Packag	je doc	69 kB	8/26/2019 1:25 AM	
	8 2 XM	20 1 Collaboration	Center - Title Order	Title 2	Title Order - XM	L xml	6 kB	8/20/2019 10:14 AM	· ~
– Con	nmu	inications 🔽	New Message	Chat	E Folder	Contact	s		
\geq	0	From:	To:		Test doc			8/26/2019 1:37 AM	^
	6	From:	To:		test doc			8/26/2019 1:35 AM	
\sim	6	From	To:	Signed Loan Package - Test 8/26/2019 1:3					
\leq	0	From:	To:	Sunny Oaks New Order - New Order 8/20/2019 10:1					
		From:	To:		ATTN Required :: Title	Order St	atus	8/20/2019 10:12 AM	
\sim	6	From:	To:		664 W Sunnyoaks Ave	Order - N	lew (8/20/2019 10:12 AM	~

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:

	COLLABORATION CENTER								H Lender, Hassan 🔻
+	New Folder	Filter • Sort •					Status: New	 Assigned To: Unassig 	ned
Sean	ch	٩	Address	2100 Bering Dr			Buyer/Borrower	Hassan	
	2100 Baring Dr	Ctatus	STE/APT/FL				Co-Borrower	Riaz	
•	Houston, TX 77056 B: Hassan	New	City	Houston			Seller		
	0152 Mun St	Chatan	State	Texas		~)			
	Houston, TX 77056 B: BB: S: SI R	New	Zip Code	77056					
	0151 Mar 0		County	Harris					
	Houston, TX 77056 B: BB S: SLR	New	+ Files	Add File					Filter: All Files 🗸
	0127 Sunday Dr Houston, TX 77056	Status New	+ Communicat	tions 🔛 New Message	Chat	H Folder C	ontacts		Filter: 🗛 🗸
	B:bb S:s							Create	Folder Cancel
	1153 Sunday Dr Houston, TX 77056	Status New							
	B: bb S: s		+ Orders	Create Order					
2	0952 Sunday Dr	Status							

- 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.

	CENTER								H Lender, Has	san 🔻
+ Sea	New Folder	Filter V Sort V	Address	2100 Bering Dr			Status: New Buyer/Borrower	Assigned To: Unassigned Hassan	1	3
	2100 Bering Dr Houston, TX 77056 B: Hassan	Status A	STE/APT/FL City State	Houston			Co-Borrower Seller	Riaz		
	9152 Mun St Houston, TX 77056 B: BB \$: SLR	Status New	Zip Code County	Texas 77056						
	9151 Mun St Houston, TX 77056 B: BB S: SLR	Status New	+ Files	Add File					Filter: All Files	~
	0127 Sunday Dr Houston, TX 77056 B: bb S: s	Status New	+ Communicat	ions 🔛 New Message	Chat	H Folder Co	ontacts	Create Ed	Filter: All	v
	1153 Sunday Dr Houston, TX 77056 B: bb S: s	Status New	+ Orders	Create Order				Citate i	Cancer	
3										

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.

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

– Files 📲	Add File	CB PDF Compare		Filte
File Upload				
		Drop files here		
Select File			Please	e select f
Name	6 File Upload	A tora Cala a Tatyon a R	T I VMI	>
0 0 0 14 2 COlla	Organize ▼ New fol	Ider	earch Test XIVILs	
- Communicatic	This PC 3D Objects Desktop Documents Downloads	Name 8 2 1 Collaboration Center - Title Order X 8 7 1 8 9 2 8 9 3 Collaboration Center - Tit 8 7 1 8 9 2 Collaboration Center - Title Or 8 7 1 Collaboration Center - Title 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 XMI File
	File	name: 821Collaboration Center - Title Orde 🗸 🛛	All Files	~ Cancel

6. The file you selected is displayed 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 S	: Pamela Kend : Bert Thomas	Iry
· Files	Add File	PDF Compare		Filte	All Files
File Upload					
		Drop files here			
Select File				1	file(s) in queue
8 2 1Collaboratio	n Center - Title Order X	(ML Example.xml (text/xml) - 6.80 kb (p	ending)		remove
Cancel					Upload
Name		Descrip	tion Category Type	Size Date	
		Ale Conten VIII Exemple and	vml	C HD 0-00	414

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

Name		Description	Category Type	Size	Date	~
8 14 2	Collaboration Center - Title Order XML Example.xml		xml	6 kB	8:28 AM	
Edit						
🖪 Send						~
📋 Delete	Chat		Folder Contacts			

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**.

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.

Folder Actions Folder ID	9786	HUD-1 Settlement Statement Lender Closing Instructions Lender Closing Doc Package Lender Title Policy Mortgage/Deed of Trust	^			B: Pa S: Be	R Statu Imela Ko ert Thon	amso s: (1 endry nas	ey, Iramse New	y77 -
– Files	Add File	Owners Title Policy Payoff Document PDF Compare Results Promissory Note Purchase/Sales Contract Settlement Order - Doc Settlement Order - XML					F	ilter:	All Files	
Select File 8 2 1Collaboration Cer Cancel	nter - Title Order XML Exampl	Settlement Statement (Buyer) Settlement Statement (Seller) Title Commitment - Final Title Commitment - Prelim Title Order - Doc	- 5)				1 THE	e(s) in que <i>remov</i> Uplo:	e ad
Name 8 14 2	Description	Title Order - XML Uniform Closing Dataset	Ĵ			<u>Type</u>	<u>Size</u>	D	ate	^
Collaboration Center - Title Order XML	Title Order	Terminal and a second	~	Save	Cance	l xml	6 kB	8:	28 AM	~

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

	COLLABORATION CENTER								HL Lender,	Hassan 🔻
+ Sea	New Folder	Filter • Sort •	Address	2100 Bering Dr			Status: New Buyer/Borrower	Assigned To:	Unassigned	
•	2100 Bering Dr Houston, TX 77056 B: Hassan	Status A	STE/APT/FL City State	Houston			Co-Borrower Seller	Riaz		
	9152 Mun St Houston, TX 77056 B: BB \$: SLR	Status New	Zip Code County	Texas 77056 Harris						
	9151 Mun St Houston, TX 77056 B: BB S: SLR	Status New	+ Files	Add File					Filter: All File	is 💙
	0127 Sunday Dr Houston, TX 77056 B: bb S: s	Status New	+ Communicati	ONS 🛛 New Message	Chat	HI Folder Co	ontacts		Filter: A	el
	1153 Sunday Dr Houston, TX 77056 B: bb S: s	Status New	+ Orders	Create Order						
2	0952 Supday Dr	Status								

10. The Order Services and Products page will display.

Order Services and Pr	oducts	
Order For: Folder ID: 67072 2100 Bering Dr Houston, TX 77056	B: Hassan	
Create an order by selecting a category, choo Orders will be sent to the email address the p contact person's email address.	ose an available provider, and provider has on file. You can a	d then select the service and products. also send a copy of this order to a spe
Select Loan Purpose		
Refinance	~	
Select Category *		
Select	~	
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 P	roducts
Order For: Folder ID: 67072 2100 Bering Dr Houston, TX 77056	B: Hassan
Create an order by selecting a category, ch Orders will be sent to the email address the contact person's email address.	pose an available provider, and then select the service and products. provider has on file. You can also send a copy of this order to a specific
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 Service	s (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:



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:



Title and Escrow/Settlement:



- 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 (opt	ional) 🕄		
Comment			
You can also provide additional	details here.		
Attach Filo			
Allach File			
Attach File			

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

mm/dd/yyyy			
Due Date			
mm/dd/yyyy			
Contact Email Address (optional	Attach Files to Order		×
Comment	Select to attach files from the available list below.		
	Name	Category	Date
	Collaboration Center - Title Order XML.xml	Title Order - XML	9/9/2024 5:20 AM
	Upload Files ()		
You can also provide additional deta		Drop files here	
Attach File	Select File		Please select file(s) to upload.
N Attach File			
	Cancel		Attach
Cancel		Send Order 🖪	

- 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.

Attach File	
Attached Files	
Collaboration Center - Title Order XML.xml	
Cancel	Send Order 🖪

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

Attach File		
Attached Files Collaboration Center - Title Order XML.xml	圖	
		_
Cancel	Send Order 🚀	

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 Cen	tralized Title Services		
(National) Order Date	9/9/2024			
Status		Estimated Closing Date	Due Date	
New	~	9/9/2024	mm/dd/yyyy	
Reference # ((optional)			
Participants 🤅	•			
MR Mohsir	n Rizwan	C Stewart PreProd Central Tit	tle Services	
Commont				
Comment				
Attachments	; on Contor Tit	le Order XML 11 xml (Desc)		
Scollaboratio	on center - na			
🖋 Update (Order			Done
Order Histor	y 🗸			
	,			

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

Status	Estimated Closing D	ate *	Due Date	
New ~	9/9/2024	Ê	mm/dd/yyyy	
Reference # (optional)				
Destining of the				
Participants 💿				
MR Mohsin Rizwan $ imes$	SC Stewart PreProc	d Central	Title Services X	
Comment				
Any update on this file				
				12
Attachments				
S Collaboration Center - Titl	e Order XML 11.xml (D	lesc)		
Note: 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**.

-older Actions								
Folder ID: Date Created:	67075 9/9/2024 6:09 AM	Address: City/State/Zip:	3060 Muns St Houston, TX 77056		Buyer/Bo Co-Borro Seller:	rrower: BB wer: CB SLR		
Files	Add File					Filt	ter: All File	s 🗸
File Upload								
			Drop files here					
Ontract File					Inlanded P	lacase select	filo(a) to u	boolar
Select File				All File	es Uploaded. P	lease select	file(s) to u	ipload.
Select File				All File	es Uploaded. P	lease select	t file(s) to u	ipload.
Select File	files unloaded are only visible t	o you and the people you shar	e it with. Check the box to	All File	es Uploaded. P	lease select	t file(s) to u	pload. ▶
Select File	files uploaded are only visible t	o you and the people you shar	e it with. Check the box to	All File	es Uploaded. P	lease select	t file(s) to u	ipload. ►
Select File	files uploaded are only visible t	o you and the people you shar	e it with. Check the box to Description	All File	es Uploaded. P eone. <u>Type</u>	Size Dat	t file(s) to u	pload. ►
Select File	files uploaded are only visible t	o you and the people you shar	e it with. Check the box to Description Document	All File o share the files with some <u>Category</u> Affidavit	eone. Jype pdf	Size Dat 33KB 6:48	tfile(s) to u	ıpload. ►
Select File ancel Share Files: All Name Test1.pdf Collaboratic	files uploaded are only visible t	o you and the people you shar	e it with. Check the box to Description Document Desc	All File o share the files with some <u>Category</u> Affidavit Title Order - XML	es Uploaded. P eone. <u>Type</u> pdf xml	Size Dat 33KB 6:48 6KB 6:10	te 8 AM 0 AM	ıpload. ▶
Select File ancel Share Files: All Name Test1.pdf Collaboratic	files uploaded are only visible t m Center - Title Order XML 11.x	o you and the people you shar	re it with. Check the box to Description Document Desc	All File o share the files with some <u>Category</u> Affidavit Title Order - XML	es Uploaded, P eone. <u>Type</u> pdf xml	<u>Size Dat</u> 33KB 6:48 6KB 6:10	te 8 AM 0 AM	ıpload. ►
Select File ancel Share Files: All Name Test1.pdf Collaboratic Communicatio	files uploaded are only visible t m Center - Title Order XML 11.x ns Mew Message	o you and the people you shar cml	e it with. Check the box to Description Document Desc	All File o share the files with some <u>Category</u> Affidavit Title Order - XML	eone. Type pdf xml	Size Dat 33KB 6:44 6KB 6:10	te 8 AM 0 AM Filter: All	ıpload. ►
Select File Ancel Share Files: All Name Control Test: pdf Collaboratic Communicatio Communicatio Communicatio	files uploaded are only visible t in Center - Title Order XML 11.x NS Mew Message Iohsin To: Stewar	o you and the people you shar mi	e it with. Check the box to Description Document Desc State Contacts st 36206 - Title and Escrow	All File o share the files with some <u>Category</u> Affidavit Title Order - XML	es Uploaded, P eone. Type pdf xml der for Title and Es	Size Dat 33KB 6:48 6KB 6:10	te 8 AM 0 AM Filter: All 6:11	AM
Select File Cancel Share Files: All Name Test1.pdf Collaboratic Communicatio	files uploaded are only visible t in Center - Title Order XML 11.x IIS IN New Message fohsin To: Stewar Create Order	o you and the people you shar mi Chat t PreProd Order Reques	re it with. Check the box to <u>Description</u> Document Desc LL Folder Contacts st 36206 - Title and Escrow	All File o share the files with some <u>Category</u> Affidavit Title Order - XML	es Uploaded, P Bone. Type pdf xml der for Title and Es	Size Dat 33KB 6:48 6KB 6:10	te 8 AM 0 AM 6:11	AM

3. Click the pencil icon to Edit.

Folder Actions 🛇			Status:	New ~ Ass	igned To:	Unassig	gned			
Folder ID: Date Created:	67075 9/9/2024 6∶09 AM	Address: City/State/Zip:	3060 Muns St Houston, TX 77056			Buyer/Bo Co-Borro Seller:	orrower: ower:	BB CB SLR		
– Files	Add File							Filter:	All Files	~
File Upload										
			Drop files here							
Select File				All	Files Uplo	aded. P	lease s	elect file	e(s) to uplo	oad.
∢ <u>Cancel</u>										Þ
Cancel	filos unloadod aro only visiblo to v	ou and the people you share	a it with Chack the box	to share the files with s	000000					Þ
Cancel Share Files: All	files uploaded are only visible to y	ou and the people you share	e it with. Check the box	to share the files with s	omeone.					F
Cancel Share Files: All Name	files uploaded are only visible to y	ou and the people you shar	e it with. Check the box Description	to share the files with s	omeone.	Type	Size	Date		•
Cancel Share Files: All 1 Name Test1.pdf	files uploaded are only visible to y	ou and the people you shar	e it with. Check the box <u>Description</u> Document	to share the files with s <u>Category</u> Affidavit	omeone.	<u>Type</u> pdf	<u>Size</u> 33KB	<u>Date</u> 6:48 Al	M	•
Cancel Share Files: All 1 Name Test1.pdf Collaboratio	files uploaded are only visible to y n Center - Title Order XML 11.xml	ou and the people you shar	e it with. Check the box Description Document Desc	to share the files with s <u>Category</u> Affidavit Title Order - XML	omeone.	Type pdf xml	Size 33KB 6KB	Date 6:48 Al 6:10 Al	M	•
Cancel Share Files: All Name Test1.pdf Collaboratio	files uploaded are only visible to yon the second state of the sec	ou and the people you shar	e it with. Check the box Description Document Desc	to share the files with s <u>Category</u> Affidavit Title Order - XML	omeone.	<u>Type</u> pdf xml	<u>Size</u> 33KB 6KB	Date 6:48 Al 6:10 Al	M M	•
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Cancel Share Files: All Name Test1.pdf Collaboratio Communication Communication From: M	files uploaded are only visible to y n Center - Title Order XML 11.xml ns <u>New Message</u> Johsin To: Stewart Pr	ou and the people you share	e it with. Check the box Description Document Desc Lik Folder Contacts st 36206 - Title and Escro	to share the files with s <u>Category</u> Affidavit Title Order - XML ww/Settlement - Requestin	omeone.	Type pdf xml	<u>Size</u> 33KB 6KB	Date 6:48 AI 6:10 AI Fil	M M ter: All 6:11 AN	× •
Cancel Share Files: All Name Test1.pdf Collaboratio Communicatioo Communicatioo From: M Orders	files uploaded are only visible to y n Center - Title Order XML 11.xml ns New Message f iohsin To: Stewart Pr Greate Order	e Chat	e it with. Check the box Description Document Desc United States Desc De	to share the files with s <u>Category</u> Affidavit Title Order - XML w/Settlement - Requestin	omeone.	Type pdf xml	Size 33KB 6KB	Date 6:48 Al 6:10 Al Fit	M M 6:11 AN	
Cancel Share Files: All Share Files: All Test1.pdf Collaboratio Communication Communication Conders Service Name	files uploaded are only visible to y n Center - Title Order XML 11.xml ns Mew Message f ohsin To: Stewart Pr Create Order	ou and the people you share	e it with. Check the box Description Document Desc Us Folder Contacts st 36206 - Title and Escre	to share the files with s <u>Category</u> Affidavit Title Order - XML w/Settlement - Requestin	omeone. g order for T	Type pdf xml Title and E	Size 33KB 6KB scrc	Date 6:48 Al 6:10 Al Fil	M M 6:11 Al ate Act	• • • • • •
Share Files: All 1 Share Files: All 1 Name Test1.pdf Collaboratio Communication Corders Service Name Title and Escrow/	files uploaded are only visible to y n Center - Title Order XML 11.xml ns New Message ohsin To: Stewart Pr Create Order Provide Settlement Stewart C	ou and the people you share	e it with. Check the box Description Document Desc St 36206 - Title and Escro ational)	to share the files with s <u>Category</u> Affidavit Title Order - XML w/Settlement - Requestin Order ID 36206	omeone. g order for T Status New	Jype pdf xml Title and E	<u>Size</u> 33KB 6KB scrc st Stat	Date 6:48 Al 6:10 Al Fil	M M 6:11 AN ate Act	ions

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

Provider	Stewart Cen	tralized Title Services			
(National) Order Date	9/9/2024				
Status		Estimated Closing Date	Due Date		
New	~	9/9/2024	mm/dd/yyyy		
Reference #	(optional)				
Participants (9				
MR Mohsin	n Rizwan	C Stewart PreProd Central T	itle Services		
Comment					
					le
Attachments	5				
🗞 Collaborati	on Center - Titl	e Order XML 11.xml (Desc)			
🖋 Update (Order			Don	e
Order Histor	vv				

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

Attac	h Files to Order		×
Selec	to attach files from the available list below.		
	Name	Category	Date
	Test1.pdf	Affidavit	9/9/2024 6:48 AM
	Collaboration Center - Title Order XML 11.xml	Title Order - XML	9/9/2024 6:10 AM
Uploa	d Files 1		
	Drop files here		
Selec	t File		Please select file(s) to upload.
Can	cel		Attach

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

Comment	
	1.
Attachments	
Scollaboration Center - Title Order XML 11.xml (Desc	5)
Attached Files	
Test1.pdf	
·	
Note: 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**.

Folder Actions 🛇			Status:	New - Assig	gned To: Unass	igned			
Folder ID: Date Created:	67231 9/11/2024 1:50 PM	Address: City/State/Zip: County:	2100 Bering Dr Houston, TX 77056 Harris		Buyer/Borro Co-Borrowe	wer: Hass r: Riaz	an		
– Files 📔	Add File						Filter: All F	iles	~
Name			Description	Category	Туре	Size	Date		-
Collaboration	n Center - Title Order XI	ML.xml	Test	Title Order - XML	xml	6KB	1:51 PM		
– Communicatior	15 💌 New Message	Chat	# Folder Contacts				Filter:	All	Ţ
						_		50 014	
From: Ha	issan Io:	Stewart PreProd Order Req	uest 36334 - Title and Escrow	/Settlement - Requesting	order for Title and I	ESCIC	13	52 PM	-
– Orders	Create Order								
Service Name		Provider		Order ID	Status L	ast Statu	is Update	Action	s
Title and Escrow/S	Settlement	Stewart Centralized Title Services (National)	36334	New 9/	/11/2024 1	52 PM		

- 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.

Folder Actions 🛇		Status:	New 🗸 Assign	ned To: Unassigned		
Folder ID: 67231 Date Created: 9/11/2024	Address: 1:50 PM City/State/7 County:	2100 Bering Dr Zip: Houston, TX 77056 Harris		Buyer/Borrower: Ha Co-Borrower: Ri	assan az	
– Files 📑 Add File					Filter: All Files	~
Name		Description	Category	<u>Type</u> <u>Size</u>	Date	*
Collaboration Center - Tit	le Order XML.xml	Test	Title Order - XML	xml 6KB	1:51 PM	
						Ŧ
– Communications 🔀 New	w Message 🦳 Chat	USE Folder Contacts			Filter: All	~
From: Stewart Title Co	ompan To: Hassan, Stewart PrePro Order U	Jpdate 36334 - Title and Escrow	Settlement - Title and Escro	ow/Settlement Order 36	2:00 PM	•
📉 🗸 🔗 From: Hassan	To: Stewart PreProd Order R	Request 36334 - Title and Escrov	v/Settlement - Requesting o	order for Title and Escro	1:52 PM	Ŧ
- Orders Create Order						
Service Name	Provider	Orde	er ID Status	Last Sta	atus Update Acti	ons
Title and Escrow/Settlement	Stewart Centralized Title Services ((National) 3633	4 In Pr	ogress 9/11/2024	4 2:00 PM	

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

Folder Action Folder II Date Cre	s ⊘): 67231 ⊧ated: 9/11/2024 1:50 Pi	Ac M Ci Co	ddress: ity/State/Zip: ounty:	Sta 2100 Bering Dr Houston, TX 77056 Harris	ntus: New ~	Assigned To: Un Buyer/B Co-Borro	assign orrowei ower:	ed r: Hassan Riaz			
– Files	Add File							Fi	Iter: All F	iles	~
Nar	ne			Description	Category	Т	<u>pe</u>	Size Da	ate		-
	aboration Center - Title Orde	er XML.xml		Test	Title Order -	XML XI	nl 6	5KB 1:	51 PM		
– Commu	nications 🛛 New Mess	sage Chat		Elder Contact	5				Filter:	All	•
– –	From: Stewart Title Compan	To: Hassan, Stewart PrePro	Order Upda	te 36334 - Title and E	scrow/Settlement - Title	and Escrow/Settlement	Order (3€	2:0	02 PM	-
•	From: Stewart Title Compan	To: Hassan, Stewart PrePro	Order Upda	te 36334 - Title and E	scrow/Settlement - Title	and Escrow/Settlement	Order	36	2:0	00 PM	
🔤 🗸 🔗	From: Hassan	To: Stewart PreProd	Order Requ	est 36334 - Title and I	Escrow/Settlement - Re	equesting order for Title a	ind Esc	rc	1:	52 PM	-
- Orders	Create Order										
Service	Name	Provider			Order ID	Status	Las	t Status I	Jpdate	Action	ns
Title and	Escrow/Settlement	Stewart Centralized Title S	Services (Nat	ional)	36334	 Completed 	9/11/	/2024 2:02	PM		

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

Folder Actions 🛇				Status:	New ~ As	ssigned To: Unass	signed		
Folder ID: Date Created:	67231 9/11/2024 1:50 PM		Address: City/State/Zip: County:	2100 Bering Dr Houston, TX 77056 Harris		Buyer/Borro Co-Borrowe	ower: Hass er: Riaz	san	
– Files 🚺	Add File							Filter: All File	s 🗸
Name				Description	Category	Туре	e <u>Size</u>	Date	-
Collaboration	n Center - Title Order	XML.xml		Test	Title Order - XMI	L xml	6KB	1:51 PM	
– Communication	ns 🔛 New Messa	ge Chat		E Folder Contacts		5	dan Oʻ	Filter: All	~ ~
	tewart nite Company	0. Hassan, Stewart PrePr	0 Order Upda	ate 36334 - Title and Escro	W/Settlement - The and	Escrow/Settlement Or	der 3t	Z.04	PIVI
From: St	tewart Title Compan T	o: Hassan, Stewart PrePr	O Order Upda	ate 36334 - Title and Escro	w/Settlement - Title and	Escrow/Settlement Or	der 3€	2:02	PM
From: St	tewart Title Compan T	o: Hassan, Stewart PrePr	Order Upda	ate 36334 - Title and Escro	w/Settlement - Title and	Escrow/Settlement Or	der 3€	2:00	PM
🖿 🗸 🔗 From: Ha	assan T	o: Stewart PreProd	Order Requ	uest 36334 - Title and Escre	ow/Settlement - Reques	ting order for Title and	Escrc	1:52	PM 💂
– Orders	Create Order								
Service Name		Provider			Order ID	Status I	ast Stati	us Update 🛛 🖌	ctions
Title and Escrow/	Settlement	Stewart Centralized Tit	e Services (N	lational)	36334	Closed 9	/11/2024 2	::04 PM	

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

Folder Action	is 🖸			Statu	JS: New 🗸	Assigned To: Unas	signed		
Folder II Date Cre	D: 67231 eated: 9/11/2024 1:50 Pl	M C	Address: City/State/Zip: County:	2100 Bering Dr Houston, TX 77056 Harris		Buyer/Borr Co-Borrow	ower: Has: er: Riaz	san	
– Files	₫ Add File)						Filter: AI	l Files 🗸 🗸
Nai	me			Description	<u>Category</u>	Тур	e <u>Size</u>	Date	· · · · · · · · ·
Col	laboration Center - Title Orde	er XML.xml		Test	Title Order - >	KML xml	6KB	1:51 PM	
– Commu	nications 🏼 New Mess	sage 🔦 Chat		USE Folder Contacts				Filter:	All ~
✓ -	From: Hassan	To: Stewart PreProd	Order Upda	ate 36334 - Title and Esc	row/Settlement - Title a	nd Escrow/Settlement O	rder 3€		2:07 PM
- 🗠	From: Stewart Title Compan	To: Hassan, Stewart PrePr	Order Upda	ate 36334 - Title and Esc	row/Settlement - Title a	nd Escrow/Settlement O	rder 36		2:04 PM
– 🖌 –	From: Stewart Title Compan	To: Hassan, Stewart PrePr	Order Upda	ate 36334 - Title and Esc	row/Settlement - Title a	nd Escrow/Settlement O	rder 3€		2:02 PM
– 🖌 –	From: Stewart Title Compan	To: Hassan, Stewart PrePr	Order Upda	ate 36334 - Title and Esc	row/Settlement - Title a	nd Escrow/Settlement O	rder 3€		2:00 PM
~ 6	From: Hassan	To: Stewart PreProd	Order Requ	uest 36334 - Title and Es	crow/Settlement - Requ	uesting order for Title and	I Escrc		1:52 PM
– Orders	Create Order								
Service	e Name	Provider			Order ID	Status	Last Stat	us Update	Actions
Title and	Escrow/Settlement	Stewart Centralized Title	Services (Na	itional)	36334	× Cancelled	9/11/2024 2	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**.

Folder Actions ©						Assigned To:	Assigned To: Unassigned						
	Folder ID: Date Created:	66633 8/20/2024 5:05 PM		Address: City/State/Zip: County:	4011 Essex Ln Houston, TX 77027 Harris			Buyer/Borrower: Co-Borrower: Seller:	V D k				
-	Files 🚺	Add File									Filter: All F	iles	~
	Name					Description	Category		Туре	Size	Date		-
🗌 🔲 📓 Collaboration Center - Title Order XML.xml						Desc	Title Order - XML		xml	6KB	5:07 PM		
-	Communicatior	15 🖬 New Message	Chat His Folder Cont	tacts							Filter:	Received	v v
🛡 📷 😱 From: Stewart Title Compar. To: Vishal, Stewart PreProd. Order Update 35926 - Non-Insured Title - Non-Insured Title Order 35928 has been updated: Comment Added (see below) This ORG ID 20 need to be Onboard											5:5	0 PM	^
From: Stewart Title Compan To: Vishal, Stewart PreProd. Order Update 3926 - Non-Insured Title - Non-Insured Title Order 35220 has been updated: Status updated to - Onboarding Required Comment Added (see below) Thie ORG II 5-40 PM											-		
-	Orders	Create Order											
	Service Name	Provi	der			Order ID	Status		La	st Statu	s Update	Action	s
Ŵ	Non-Insured Title	Stewar	rt Centralized Title Services (National)			35926	Onboarding Required		8/2	0/2024 5:	50 PM	\geq	

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