



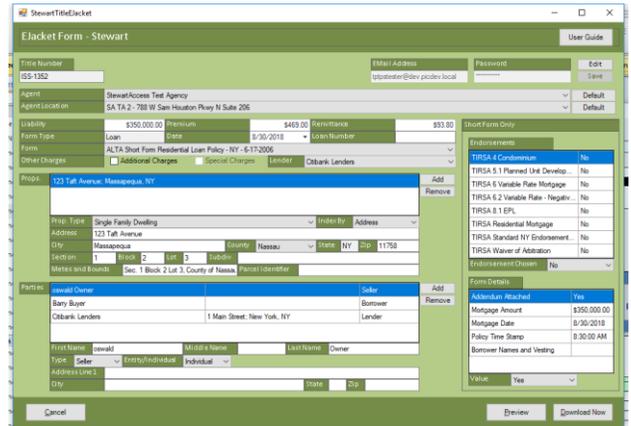
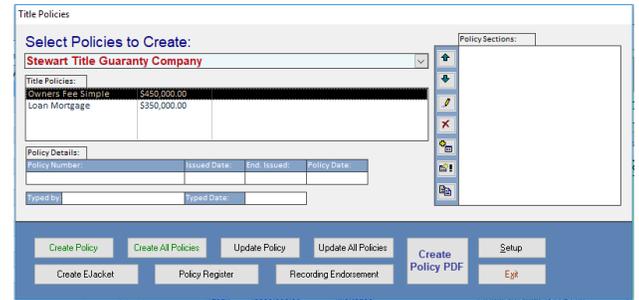
TrackerPro
TITLE INSURANCE SOFTWARE

TrackerPro
Stewart Title Integration
User Guide

Revised: 8/28/2018

EJackets

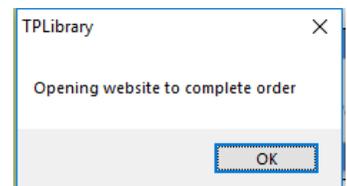
- 1) Click the Create EJacket button from within the Title Policy Documents window of TrackerPro. The Stewart Title Underwriter EJacket Form will open.
- 2) This screen allows the user to see the information that will be sent to Stewart Title. TrackerPro will auto-populate all fields necessary to create the EJacket. The user may override many of the settings. Note: The user can type anything into these fields however our suggestion is to always enter the correct information into the proper area of TrackerPro before opening the EJacket window so that all correct values will be displayed. **If the user adjusts something in the EJacket window, it will not change the values in any other areas of TrackerPro. It will only be used for the current EJacket order.**



Click the Download Now button. If this policy meets all of Stewart's requirements for issuing a policy the EJacket will be generated, downloaded and saved in the TrackerPro File Cabinet for the current application. The EJacket will also be added to the Title Policy Sections window so that they can be included when full Title Policy is created and, the Policy Number will automatically merge into all policy and endorsement documents.

There are 3 possible scenarios when you click Download Now.

- A) A Jacket is created and downloaded.
- B) The system might reject your submission immediately for certain criteria reasons. If so you will get a message detailing why this has been rejected, typically because of missing or invalid information.
- C) The system might require you to go to Stewart's website to complete the order, typically to request information that is not available to be sent through the integration. If this is the case you will get a popup signifying that and Stewart's website will open to a page for you to complete your order.



When you complete your order on the website you will receive an e-mail notifying you that we have received the Jacket instantly, and the Jacket will be available within TrackerPro within 10 minutes.

CPLs

- 1) Open the Edit Transactions window, select the Loan Policy for which the CPL will be issued and click the CPL button. This button may be labelled Closing Protection Letter or something similar depending on the state. As a reminder, CPLs are generated on Loan Policies only. The Underwriter Letter Form for Stewart Title will open. Note that Stewart does not support letters in NY state.
- 2) TrackerPro will auto-populate all fields necessary to create the CPL. When all of the information is correct you can just click Download Now button to generate the CPL.

Note: The user can type anything into these fields. However, our suggestion is to always enter the correct information into the proper area of TrackerPro before opening the CPL window. **If the user adjusts something in the CPL window, it will not change the value in any other area of TrackerPro. It will be used for the current CPL order only.**

- 3) Click the Download Now button. The CPL will be generated, downloaded and saved in the TrackerPro File Cabinet for the current application. The user may send the letter out as needed using any of the standard TrackerPro methods.

Note: The same 3 scenarios exist for CPLs, whereby the order might be:

- A) Successful
- B) Rejected and left at the CPL screen
- C) Forwarded to Stewart's website for completion

The screenshot shows the 'StewartTitleCPL' window with the following data:

Field	Value								
Title Number	ISS-1348								
EMail Address	ltpstester@dev.picdev.local								
Password	*****								
Agent	StewartAccess Test Agency								
Agent Location	StewartAccess Test Agency Inc - 1980 Post Oak Suite 800								
Covered Party	<input type="radio"/> Buyer / Borrower <input type="radio"/> Seller <input checked="" type="radio"/> Lender								
Form	NJ Single Transaction Closing Service Letter CSL								
Loan Number									
Date	8/29/2018								
Props.	123 Taft Avenue Unit. 123, Madison, NJ								
Prop. Type	Single Family Dwelling								
Address	123 Taft Avenue Unit: 123								
City	Madison								
County	Morris								
State	NJ								
Zip	07940								
Section									
Block	2								
Lot	3								
Subdiv.	1 bronxville owners corp								
Metes and Bounds	Block 2 Lot 3, County of Morris, State of NJ								
Parties	<table border="1"><tr><td>Oswald Owner</td><td>Seller</td></tr><tr><td>Bill Buyer</td><td>Borrower</td></tr><tr><td>1880 Bank</td><td>304 High Street; Cambridge, MD</td></tr><tr><td></td><td>Lender</td></tr></table>	Oswald Owner	Seller	Bill Buyer	Borrower	1880 Bank	304 High Street; Cambridge, MD		Lender
Oswald Owner	Seller								
Bill Buyer	Borrower								
1880 Bank	304 High Street; Cambridge, MD								
	Lender								
First Name	Oswald								
Middle Name									
Last Name	Owner								
Type	Seller								
Entity/Individual	Individual								
Address Line 1									
City									
State									
Zip									
Apvd. Atry./Sec. Agency	<input checked="" type="radio"/> None <input type="radio"/> Secondary Agency <input type="radio"/> Approved Attorney								