

ProSuite and Stewart Title NextSTEPS

Do you order Title Insurance from Stewart Title NextSTEPS? Do you order online and find yourself manually completing much of the same information that you have already entered into your ProSuite file?

We are pleased to provide you with the ability to order title insurance from Stewart Title's NextSTEPS directly from your ProSuite file. This feature automates the completion of many of the fields on the NextSTEPS website. Save valuable time and increase efficiency for your firm by eliminating duplicate data entry and reducing errors that may result in repetitive work.

In order to place Stewart Title NextSTEPS title insurance orders, Stewart Title requires that users and practitioners be registered with them. Users must obtain a username and password and practitioners must obtain a Profile ID from Stewart Title.

Once you have the necessary credentials, completing the initial setup is easy and should take only a few moments.

Practitioner Setup

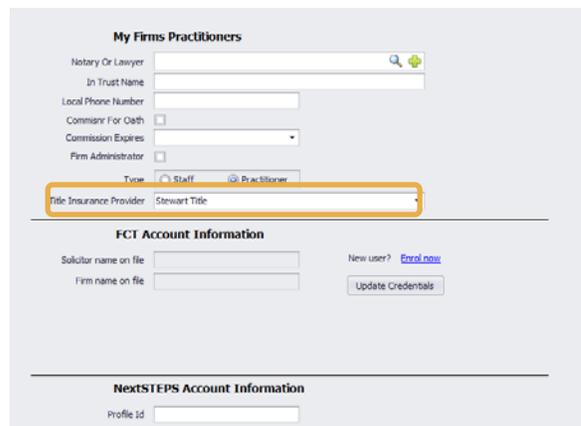
You must have Administrator or Supervisor permissions in ProSuite to complete the practitioner setup. From the Main Menu ribbon, click the My Firm button and open the Firm Personnel tab. Select the practitioner you wish to setup.

Title Insurance Provider

Select the practitioner's preferred title insurance provider from the Title Insurance Provider drop down.

The title insurance provider as selected here will automatically populate each new file opened for this practitioner.

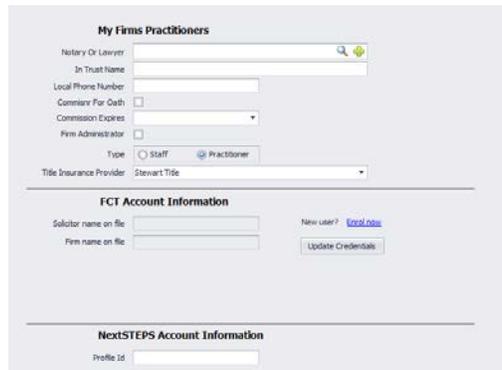
The title insurance provider can



easily be changed on a file by file basis if necessary.

Profile ID

Enter the practitioner's NextSTEPS Profile ID in the Profile ID field.



The screenshot shows a form titled "My Firms Practitioners" with several sections:

- History Or Lawyer:** Includes fields for "In Trust Name", "Local Phone Number", "Commission For Oath", "Commission Expires", and "Firm Administrator".
- Type:** Radio buttons for "Staff" and "Practitioner".
- Title Insurance Provider:** A dropdown menu for "Stewart Title".
- FCT Account Information:** Fields for "Solator name on file" and "Firm name on file", with a "New user? [Email now](#)" link and an "Update Credentials" button.
- NextSTEPS Account Information:** A field for "Profile ID".

User Setup

User setup can be completed by a firm Administrator or by the user.

As Administrator

From the Main Menu ribbon click the Firm Users button. Use the search field to locate the user you wish to setup. From the search results list, double click the appropriate user.

Click the Third Party Accounts Tab

Enter the User Name, Password and Confirm Password in the appropriate fields.



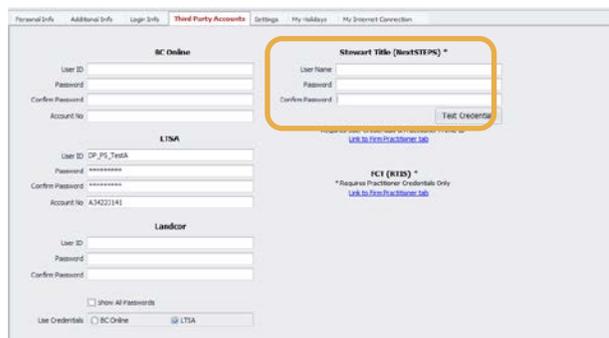
The screenshot shows the "Third Party Accounts" tab in a software interface. It features three main sections:

- BC Online:** Fields for "User ID", "Password", "Confirm Password", and "Account No".
- LISA:** Fields for "User ID", "Password", "Confirm Password", and "Account No".
- Stewart Title (NextSTEPS):** Fields for "User Name", "Password", and "Confirm Password", with a "TEST CREDENTIALS" button highlighted by a yellow box.
- FCT (RTS):** A note that it requires Practitioner Credentials Only, with a link to "Link to Firm Practitioner tab".

Click the Test Credentials button to verify that the correct credentials have been entered.

As User

From the Main Menu ribbon click the User button.



This screenshot is identical to the previous one, showing the "Third Party Accounts" tab. The "TEST CREDENTIALS" button for the Stewart Title (NextSTEPS) section is highlighted with a yellow box.

Click the Third Party Accounts Tab

Enter the User Name, Password and Confirm Password in the appropriate fields.

Click the Test Credentials button to verify that the correct credentials have been entered.

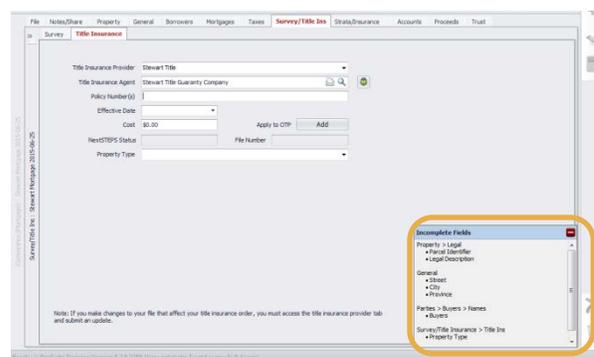
Ordering a Policy

Data Completion

Complete all information in your file as you normally would prior to accessing the Title Insurance tab.

If any of the information required by NextSTEPS is not completed, the Incomplete Fields popup will be displayed in the lower right hand corner of the screen.

This popup provides details of the screen and field names for the missing information and will remain visible throughout the file until all information is completed. The popup can be minimized.



All missing information must be completed before you can proceed to submit your title insurance order.

Submitting A Policy Order

When you are ready to submit an order, the [Continue To Order Page](#) button will become available on the Title Insurance screen.

Clicking this button will open the Stewart Title NextSTEPS tab, log you in and display the Stewart Title NextSTEPS online order form with the information from your ProSuite file already populated.

Once your order has been submitted, the Stewart Title file number and Status fields will be populated on the ProSuite Title Insurance tab.

Updating A Policy Order

If you have submitted a title insurance order but have not yet received the policy, and information that affects the order is changed in your ProSuite file, you must notify Stewart Title. Click on the [Continue To Order Page](#) button or the Stewart Title tab and the updated information will automatically populate the Stewart Title NextSTEPS fields. Navigate to the NextSTEPS Place Order tab and click the Update Order link.

Check Order Status

To see the current status of the title insurance order, simply click on the Title Insurance tab and review the NextSTEPS Status field.

Obtaining The Policy and Invoice

If the policy was issued immediately, all documents can be obtained before leaving the Stewart Title NextSTEPS screens.

If the policy was not available immediately, as soon as it becomes available, Stewart Title will send an email notification to the email address they have on file advising that the policy is ready for pickup.

To pick up the policy, in your ProSuite file go to the Survey/Title Ins tab > Stewart Title tab. Documents are available on the NextSTEPS documents tab.

ProSuite Fields Populated By Stewart Title

Title Insurance Cost

Once the NextSTEPS status is set to Ordered, the cost of the policy will be obtained from Stewart Title and will populate the Title Insurance screen.

The Add button will be selected automatically and ProSuite will apply this cost to the SOA or OTP (depending on file type).

This field is not editable by you but is updated by Stewart Title if changes are made to your order.

Policy Number

The policy number will be obtained from Stewart Title and will populate the Policy Number(s) field on the Title Insurance tab.

If there are multiple policy numbers, they will be entered in the field separated by commas.

This field is not editable by you but is updated by Stewart Title if changes are made to your order.

Cancelling a Policy Order

You must contact Stewart Title to cancel a policy order. If you cancel a policy order with Stewart Title, return to your Title Insurance tab and select another title insurance provider or the blank option from the Title Insurance Provider drop down. This will remove all reference to the Stewart Title order.

Support

For support with setup and use of this new feature please contact Do Process Customer Support at 416.322.6111, 1.866.367.7648 or inquiries@doprocess.com For help with Stewart Title's NextSTEPS enrollment, credentials or NextSTEPS order screens, please contact Stewart Title at 1.888.969.9101.