

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

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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.

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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.

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nten Password			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.

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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.

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	Title Insurance Agent	Stewart Title Guaranty Com	pany	00		
	Policy Number (s)	1				
	Effective Date					
	Cost	\$0.00	Apply to OTP A	bt		
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2-06-01	Stewart File No.	3575304	File Status *	Open 👻	
ase 201	Lawyer File No.	STG Purchase 2015	5-06-01 (Ca Closing Date *	6/30/2015	
3 Purch	Processed By	ProSuite roSuiteDe	/1		
s: STC	Lawyer				
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Survey	Office	Suite 700 - 123 From	nt Street West, Toronto, Ontario, M5J 2M2	2	
	NOTES				

Quick Reference Guide

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.

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Title Insurance Provider	Stewart Title						
Title Insurance Agent	Stewart Title Guaranty Company		1	29	0		
Policy Number(s)	M-7765 1796450						
Effective Date	June 30, 2015 •						
Cost	\$75.00	Remove from	n OTP Rem	we			
NextSTEPS Status	Ordered	File Number 3	585789				
Property Type	Keskensa singe namiy Uweling			•			
		C	ontinue To Orde	r Page			

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).

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Title Insurance	Stewart Title								
Title Insurance Provider	Stewart Title								
Title Insurance Agent	Stewart Title Guaranty Company			6	2	٥			
Policy Number(s)	M-7765 1796450								
Effect									
Cost	175.00	Apply	to OTP	Add					
NextSTEPS Status	Undered	Network	3585789						
Property Type	Residential Single Family Dwelling								
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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.

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Title Insurance Agent	Stewart Title Guaranty Company	6	39	•		
Policy Number(s)	M-7765 1796450					
Effective Date	June 30, 2015					
Cost	\$75.00	Apply to OTP Add				
NextSTEPS Status	Ordered	File Number 3585789				
Property Type	Residential Single Family Dwelling					
			-			

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.