

SOFTPRO SELECT

RELEASE NOTES



FEBRUARY, 2018

Testing Release Date: February 1, 2018

Production Release Date: February 16, 2018



FEBRUARY RELEASE NOTES

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FEBRUARY RELEASE NOTES

ALL STATES/SITES

DOCUMENTS

Escrow

1099-S Substitute Form

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	Kansas City	N/A	435193	

Minor adjustment to formatting to accommodate two properties on one page.

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EI - Disbursement (4)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	Kansas City	N/A	439042	

Added phone number and email address lines beneath the Forwarding Address line.

END OF INSTRUCTIONS

IN WITNESS WHEREOF, the undersigned have executed this document on the date(s) set forth below.

Bob L. Buyer	Date
Betty A. Buyer	Date

Forwarding Address:

Phone: _____

Email: _____

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FEBRUARY RELEASE NOTES

Exhibit Page - Choice Signatures (CSS)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	Kansas City	N/A	438193	

New prompt added to be able to select the Escrow Officer's signature:

Include lines for Escrow Officer's signature

IN WITNESS WHEREOF, the undersigned have executed this document on the date(s) set forth below.

Betty A. Buyer	Date
Bob L. Buyer	Date

Escrow Office Name

BY: _____ Date _____

Melissa G. Smith
Closing Specialist

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FEBRUARY RELEASE NOTES

Title

Generic Enclosure Letter - Title

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	Cleveland County Abstract	N/A	432538	

Revise signature to allow Cleveland County Abstract to choose the Title Officer.

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Master Commitment with Privacy Notice

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	Corporate Compliance	N/A	437767	

Added the Wire Fraud Notice to end of document.

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Master Preliminary Report

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	Corporate Compliance	N/A	437755	

Added the Wire Fraud Notice to end of document.

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FEBRUARY RELEASE NOTES

REPORTS

1099 Data Export

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
MOD			433187	
<ul style="list-style-type: none"> On parameter screen under settlement date through added picklist for Payer Tax ID 				

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Commissions by Sales Rep

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
MOD			43686	
<ul style="list-style-type: none"> Updated report parameter from "MKT info contains:" to "Mkt info (pager) contains:" 				

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Customer Report Card

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
MOD			437115	
<ul style="list-style-type: none"> Added new bank format: Fremont Bank 				

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Dormant Activity

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
MOD	CT IL		436166	
<ul style="list-style-type: none"> Added new grouping 'Trust Account, Settlement Agent, Escrow Officer/Closer' on parameter screen. This will pull the first settlement agent found in the file. Added to programming notes about this grouping and how it will pull the {{Order.SettlementAgent[1].name}} 				

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Dormant Ledgers

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
MOD	CT IL		436163	
<ul style="list-style-type: none"> Added new grouping 'Trust Account, Settlement Agent, Escrow Officer/Closer' on parameter screen. This will pull the first settlement agent found in the file. Add to programming notes about this grouping and how it will pull the {{Order.SettlementAgent[1].name}} Added column to excel export 'Settlement Agent and this will pull the first settlement agent found in the file. Added between Branch and escrow officer/closer. 				

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Dormant Ledger Exceptions

NEW/MOD MOD	REQUESTED BY CT IL	FOOTPRINTS No(s).	TFS No(s). 434207	FILE NAME (NEW ITEMS ONLY)
<ul style="list-style-type: none"> On parameter screen between branch and escrow office picklist added settlement agent lookup code picklist Added new grouping 'Trust Account, Settlement Agent, Escrow Officer/Closer' on parameter screen. This will pull the first settlement agent found in the file. Add to programming notes about this grouping and how it will pull the {{Order.SettlementAgent[1].name}} 				

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Invoice Aging

NEW/MOD MOD	REQUESTED BY CT NJ	FOOTPRINTS No(s).	TFS No(s). 435172	FILE NAME (NEW ITEMS ONLY)
<ul style="list-style-type: none"> Report will now exclude order templates from report 				

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Open/Closed Orders by Selection

NEW/MOD MOD	REQUESTED BY FT MI	FOOTPRINTS No(s).	TFS No(s). 433150	FILE NAME (NEW ITEMS ONLY)
<ul style="list-style-type: none"> On parameter screen add an option to search legal. <ul style="list-style-type: none"> Text search box label "Escrow Legal Description Contains" and search {{Order.Properties[1].EscrowLegal.Description}} Added between mkt info (pager) and use alternate bill codes paramters 				

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Order Tasks

NEW/MOD MOD	REQUESTED BY FT IL	FOOTPRINTS No(s).	TFS No(s). 435966	FILE NAME (NEW ITEMS ONLY)
<ul style="list-style-type: none"> In group 1 drop down please Added settlement agent to Group 1 dropdown <ul style="list-style-type: none"> if this option is selected orders will be group by 1st settlement agent in the order. Added verbiage on programming notes that this option looks to the first settlement agent in the office and is not the same as branch 				

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Outstanding Checks

NEW/MOD MOD	REQUESTED BY FT IN	FOOTPRINTS No(s).	TFS No(s). 434682	FILE NAME (NEW ITEMS ONLY)
<ul style="list-style-type: none"> Under "show ledger comment" checkbox add new parameter, new checkbox labeled "Show Register Notes:" If new checkbox is checked then show the register notes under the transactions as follows "Register Notes:" note date (created date) – note 				



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Order Exceptions				
NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
MOD			434198	
<ul style="list-style-type: none"> Added new state 'MN' to order exceptions report and apply same exceptions as 'OH' state Added new state 'NJ' to order exceptions report and apply same exceptions as 'OH' state + add ' Missing Buyer/TBD Buyer'. Added new state 'NY' to order exceptions report and apply same exceptions as 'OH' state 				

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Policy Fall Out				
NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
MOD	FT WA		438183	
<ul style="list-style-type: none"> Added the following parameter options to the parameter screen under the branch picklist <ul style="list-style-type: none"> Transaction Type picklist Order Type picklist Product Type picklist 				

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SPAdmin Group Member				
NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
MOD			435199	
<ul style="list-style-type: none"> Added report grand total. 				

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Trending by Selection				
NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
MOD			434688	
<ul style="list-style-type: none"> Updated report parameter from "Mkt info contains:" to "Mkt info (pager) contains:" and moved to show between "contact lookup code" text box and "Branch" picklist. 				

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FEBRUARY RELEASE NOTES

ARIZONA

DOCUMENTS

Escrow

LHC Sewer Request

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	Mohave	N/A	440917	

Updated to reflect the most recent version.

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Multiple documents

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	LoanCare Account / CT Mohave	N/A	436527	

Affected documents:

- Automated Disbursement Program Authorization - Payor
- Automated Disbursement Program Authorization - Recipient
- Buyer Account Servicing Form
- Lease Addendum
- LoanCare Fee Schedule
- LoanCare Transmittal Cover Page
- Memorandum (Impound Requirements)
- Memorandum (New Account with Note and Deed of Trust)
- Methods to Make a Payment
- Seller Account Servicing Form
- Standards for Lease-Rental Agreement

Updated logo to show LoanCare logo.

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REPORTS

Profit Center Recap				
NEW/MOD MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s). 439374	FILE NAME (NEW ITEMS ONLY)
<ul style="list-style-type: none">On Parameter screen set 'Include canceled order' as checked (TRUE) as default				

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FEBRUARY RELEASE NOTES

CALIFORNIA

DOCUMENTS

Escrow

Affidavit (Uninsured Deed)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	Settlement	N/A	435819	

Added Order No. and Property to top right of document.

UNINSURED DEED AFFIDAVIT DECLARATION OF CONVEYANCE

Order No.:	JM CD Test-JDK
Property:	1 Property Address City, CA 49503

This declaration is in connection with the deed recorded [December 4, 2017](#) as Instrument No. [12345](#) executed by the undersigned, a copy of which is attached for reference.

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Cashier's Check Request

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	CT SoCal	N/A	436253	

Revised to show correct Bank Name throughout document as well as to prompt user for the check information.

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FEBRUARY RELEASE NOTES

Commission Forms (Buyer/Seller Amended)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	CT SoCal	N/A	437658	

Added the language which indicates that the instruction cannot be amended or revoked without the broker's written consent.

Added to Commission - Buyer Amended

THIS ASSIGNMENT PROVIDES FOR THE DISBURSEMENT OF SAID COMMISSION TO THE BROKER(S) BY ESCROW HOLDER UPON CLOSE OF ESCROW. THESE ESCROW COMMISSION INSTRUCTIONS MAY NOT BE AMENDED OR REVOKED WITHOUT THE WRITTEN CONSENT OF THE BROKER(S) HEREIN.

Added to Commission - Seller Amended

I/WE HEREBY IRREVOCABLY ASSIGN TO THE BROKER(S) NAMED A PORTION OF MY SALES PROCEEDS IN AN AMOUNT EQUAL TO THE COMMISSION SET FORTH ABOVE. THIS ASSIGNMENT PROVIDES FOR THE DISBURSEMENT OF SAID COMMISSION TO THE BROKER(S) BY ESCROW HOLDER UPON CLOSE OF ESCROW. THESE ESCROW COMMISSION INSTRUCTIONS MAY NOT BE AMENDED OR REVOKED WITHOUT THE WRITTEN CONSENT OF THE BROKER(S) HEREIN.

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Demand - Institutional (NOCAL ONLY)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	NoCal	N/A	435187	

Revised to pull Escrow Assistant or Current User email when selected.

Escrow Status

Escrow office: Escrow officer/Closer:

Pre-closer/Escrow assistant:

Select who is signing the letter

- Escrow Assistant
- Current User
- Escrow Assistant
- Escrow Officer

Should you require any further information to process this request, please notify the undersigned immediately. PLEASE EMAIL YOUR DEMAND STATEMENT TO **SANDY.MOORE@EMAIL.COM** OR FAX TO **(111)222-3456**. Thank you for assisting us to comply with our escrow instructions.

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FEBRUARY RELEASE NOTES

Funding Request Letters (2)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	CT SoCal	N/A	438237	

Added date to top right section.

Wayne Smith Leonard's Lending Services 1 Lender Funding Address Someplace, CA 86404	Date: February 12, 2018 Ref No.: LRN12345 Loan Amt: \$125,000.00 Escrow No.: JM CD Test-MGS Buyer(s): Bob L. Buyer and Betty A. Buyer Premises: 1 Property Address City, CA 49503
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Important Buyer Information

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	NoCal/SoCal	N/A	437651	

Updated 'FNT Insurance Services' to 'Stillwater Insurance Group' contact information.

3. INSURANCE: You should begin now to make arrangements to obtain fire and casualty insurance for your protection and for the protection of your lender (if any). Your lender will have specific requirements for fire insurance coverage and, if applicable, flood insurance coverage. Discuss those requirements with your lender. Contact your agent now, advise him of this transaction, and discuss your insurance needs with him so that he will be prepared to provide the necessary coverage prior to the close of escrow. In the event that you do not have an agent, or if you would like to obtain an additional quote, you can contact Stillwater Insurance Group , an agency affiliated with Escrow Office Name , located at 5385 Hollister Avenue, Building 13, Santa Barbara, CA 93111, phone (888)333-2120 or fax (888)877-6355, e-mail ins@stillwater.com .

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Info Sheet Info Sheet (Letter)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	NoCal/SoCal	N/A	437651	

Updated 'FNT Insurance Services' to 'Stillwater Insurance Group' contact information.

PLEASE COMPLETE, DATE, SIGN AND RETURN Stillwater Insurance Group can provide a free, no obligation homeowner insurance quote that meets all your mortgage requirements. Call today at toll-free (888)333-2120 to avoid any delays in your property's closing.
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FEBRUARY RELEASE NOTES

Title

Preliminary Report (6)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	Corporate Compliance	N/A	437748	

Affected documents:

- Preliminary Report
- Master Preliminary Report
- Preliminary Report - Mobilehome
- Preliminary Report - Mobilehome (Attachment One)

Added the Wire Fraud Notice to end of document.

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FEBRUARY RELEASE NOTES

REPORTS

Ledger Transfer Activity

NEW/MOD MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s). 439086	FILE NAME (NEW ITEMS ONLY)
<ul style="list-style-type: none">If profile state = CA, only show ledgers posted within the date range that have an amount greater than 0.00				

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FEBRUARY RELEASE NOTES

LOOKUP TABLES

Escrow Instruction Phrases (SOCAL ONLY)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	Settlement	N/A	435113	

Phrase remove per Settlement

Code	Name
reqnot02	NOTETD/REQUEST FOR NOTICE OF DELINQUENCY

REQUEST FOR NOTICE OF DELINQUENCY: Escrow Holder is authorized and instructed to prepare and record, at the close of escrow, a Request for Notice of Delinquency which will provide that the prior lien holder shall notify Beneficiary in the event of a default by Borrowers under the prior lien. Escrow Holder is instructed to charge the Borrowers at the close of escrow with all costs in connection with preparing and recording said Request for Notice of Delinquency and with the Forty and No/100 Dollar (\$40.00) charge to be paid and remitted to each prior lien holder.

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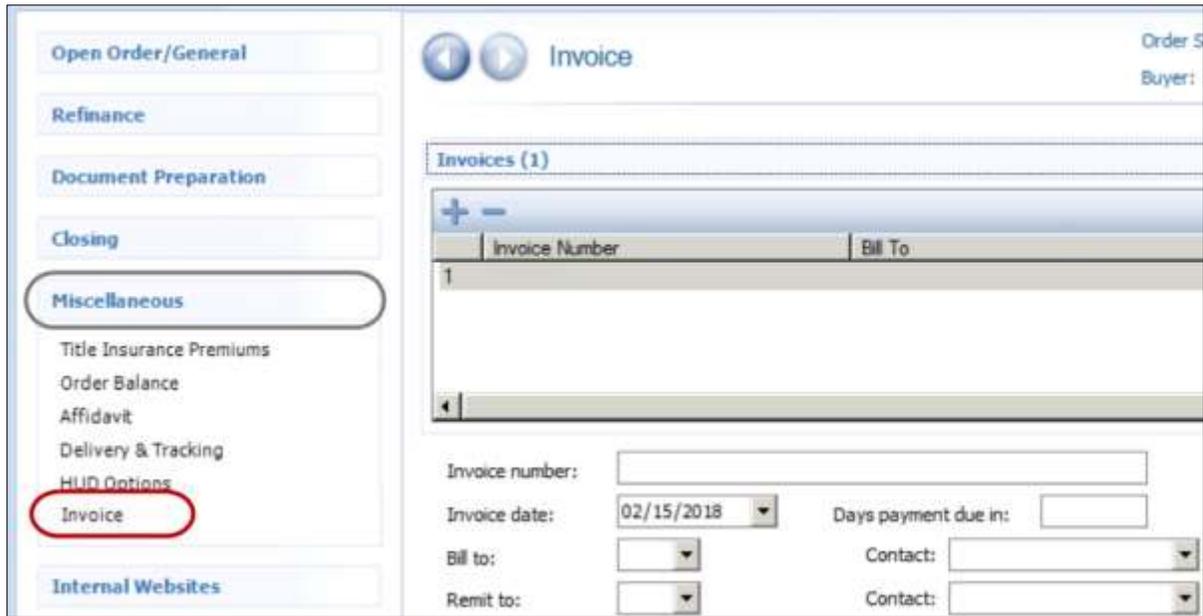
FEBRUARY RELEASE NOTES

MY SCREENS

Invoice Screen (NOCAL)

NEW/MOD Mod	REQUESTED BY Roberta Stone	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
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The Invoice screen has been added in the Miscellaneous screen set. It is available when using the My Screens, Northern CA – DSC Screens.



The screenshot displays the 'Invoice' screen within a software application. On the left, a sidebar menu is visible with the following items: 'Open Order/General', 'Refinance', 'Document Preparation', 'Closing', 'Miscellaneous' (highlighted with a red circle), 'Title Insurance Premiums', 'Order Balance', 'Affidavit', 'Delivery & Tracking', 'HUD Options', and 'Invoice' (circled in red). Below the sidebar is an 'Internal Websites' section. The main content area is titled 'Invoice' and includes a table with the following data:

Invoices (1)	
+	-
Invoice Number	Bill To
1	

Below the table, there are several input fields and dropdown menus:

- Invoice number:
- Invoice date: (dropdown)
- Days payment due in:
- Bill to: (dropdown)
- Contact: (dropdown)
- Remit to: (dropdown)
- Contact: (dropdown)

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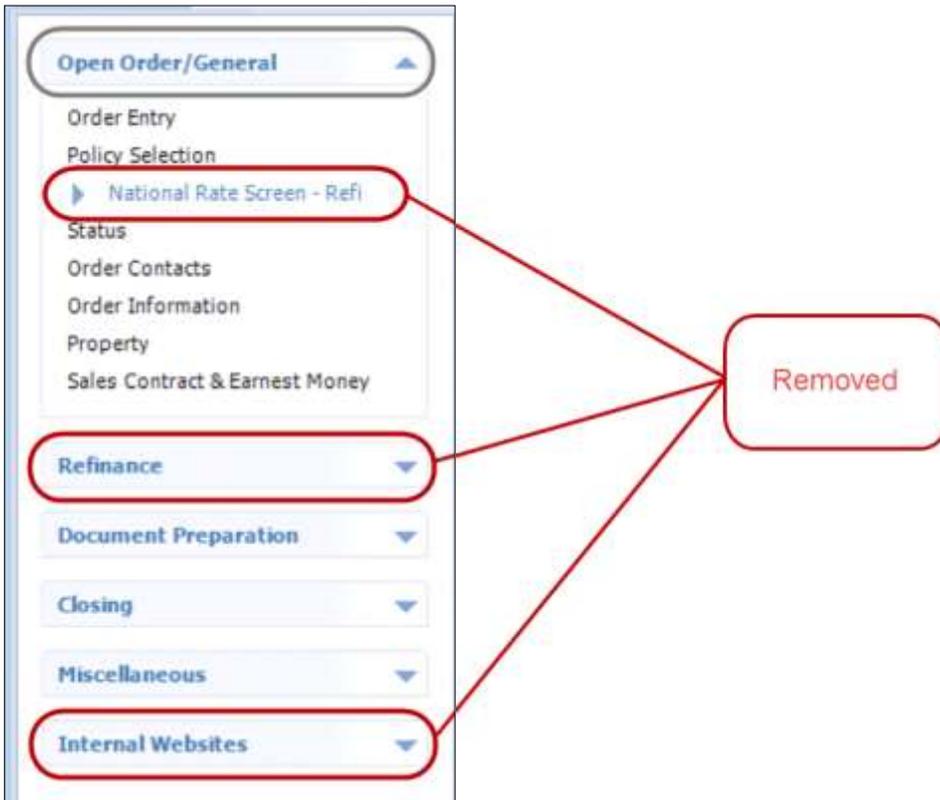
FEBRUARY RELEASE NOTES

Screens Removed for Out-of-State Orders (SOCAL)

NEW/MOD Mod	REQUESTED BY DJ Riedel	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
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The following screens have been removed for out-of-state orders:

- > Open Order/General screen set > National Rate Screen – Refi screen
- > Refinance screen set
- > Internal Websites screen set



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FEBRUARY RELEASE NOTES

FLORIDA

DOCUMENTS

Escrow

Letter (HOA Information Request)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	FT Maitland	N/A	438795	

Added the Settlement Agent's email:

*Please complete this request and [email it to EscrowOffice@email.com](mailto:EscrowOffice@email.com)
or fax to (800)222-3333 Attn: Sandy L. Moore*

MAINTENANCE FEES

Payments of \$_____ are made Monthly/Quarterly/Annually (Circle One)

A Late Payment fee of \$_____ will be charged on the _____.

Outstanding Balance: \$_____ as of: _____. Last Payment made: _____

Next Payment Due: _____ HOA Transfer fee: \$_____

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FEBRUARY RELEASE NOTES

HAWAII

DOCUMENTS

Title

Preliminary Report				
NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	Corporate Compliance	N/A	437757	
Added the Wire Fraud Notice to end of document.				

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FEBRUARY RELEASE NOTES

IDAHO

DOCUMENTS

Escrow

EI - Refinance (EIS)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	FT Boise	N/A	435810	

Updated verbiage for 'Consumer Debt Payment Disclaimer' section per Settlement:

BEFORE

CONSUMER DEBT PAYMENT DISCLAIMER

Fidelity Escrow Office Name is hereby authorized and instructed to pay the consumer loans (these are loans or debts not constituting a lien on the refinance/subject property) per Leonard's Lending Services and Chase Bank instructions. These debts include, but are not limited to, revolving accounts, unsecured loans, and vehicle loans; therefore, payment amounts will be taken directly from said lender's instructions or the account statements.

Fidelity Escrow Office Name shall be held harmless for any discrepancies in said amounts caused by additional payments and/or charges. All payments shall be in the form of a Fidelity Escrow Office Name trust account check and made payable to as per Lender's Instructions.

Borrower also understands, acknowledges and agrees that closing agent is NOT responsible for any additional interest due on their consumer debt(s) for the time it takes the check to reach their creditor.

_____ Initial _____ Initial _____ Initial _____ Initial

AFTER

Fee for each disbursement of an unsecured credit payoff
10.00

CONSUMER DEBT PAYMENT DISCLAIMER

CREDIT CARD PAYMENTS: As a condition of funding, the new lender requires certain credit card and installment accounts be paid through escrow. Borrower hereby agrees, prior to close of escrow, to provide actual statements of accounts required by lender to be paid.

In the event accounts have been paid in full or the balances reduced outside of this escrow written evidence of payment will be provided to escrow before close. A Ten And No/100 Dollar (\$10.00) fee will be charged for each disbursement of an unsecured credit payoff. Borrower understands the payments will be sent via regular first class mail.

Fidelity Escrow Office Name shall not be responsible and/or liable for any balances paid on the above accounts in excess or less than amounts currently owed, or for any late charge accruals. Borrower will hold Fidelity Escrow Office Name harmless and indemnify such against any losses or damages by reason of compliance with these instructions.

_____ Initial _____ Initial _____ Initial _____ Initial

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FEBRUARY RELEASE NOTES

EI - Purchase and Sale (EIS)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	FT Boise	N/A	435810	

Added 'Consumer Debt Payment Disclaimer' in the Disclosures area:

CONSUMER DEBT PAYMENT DISCLAIMER

Fee for each disbursement of an unsecured credit payoff
\$15.00

CREDIT CARD PAYMENTS: As a condition of funding, the new lender requires certain credit card and installment accounts be paid through escrow. Borrower hereby agrees, prior to close of escrow, to provide actual statements of accounts required by lender to be paid.

In the event accounts have been paid in full or the balances reduced outside of this escrow written evidence of payment will be provided to escrow before close. A Fifteen And No/100 Dollar (\$15.00) fee will be charged for each disbursement of an unsecured credit payoff. Borrower understands the payments will be sent via regular first class mail.

Fidelity Escrow Office Name shall not be responsible and/or liable for any balances paid on the above accounts in excess or less than amounts currently owed, or for any late charge accruals. Borrower will hold Fidelity Escrow Office Name harmless and indemnify such against any losses or damages by reason of compliance with these instructions.

_____ Initial _____ Initial _____ Initial _____ Initial

These instructions are effective for **thirty (30)** days from date hereof; and, thereafter, without written instructions to continue, you are authorized and instructed to cancel this escrow. I/We, jointly and severally, agree to pay your cancellation fee and all charges in connection therewith. In the event of cancellation of this escrow, all funds, except loan funds, shall be held subject to written cancellation instructions executed by all principals involved.

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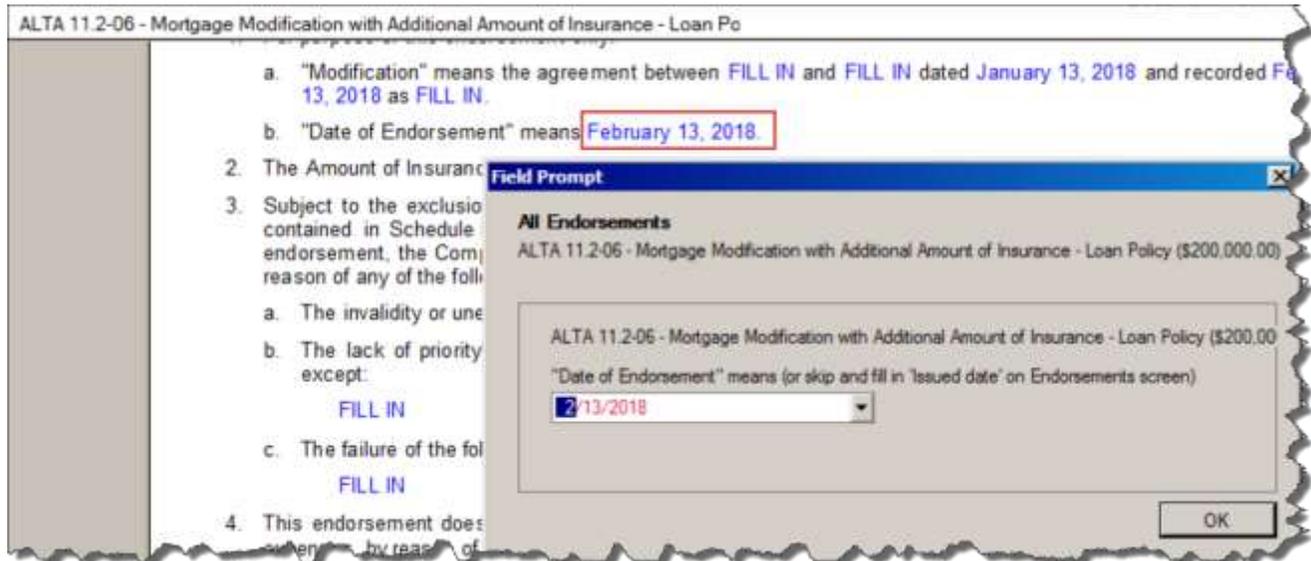
FEBRUARY RELEASE NOTES

Title

ALTA 11.2-06 - Mortgage Modification with Additional Amount of Insurance

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	FT Boise	N/A	436840	

The Date of Endorsement will continue to pull in from the Issued Date field if filled in on the Endorsements screen. However, if the Issued Date is not filled in on the Endorsements screen, the user will now be prompted when the endorsement is rendered to provide a date.



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FEBRUARY RELEASE NOTES

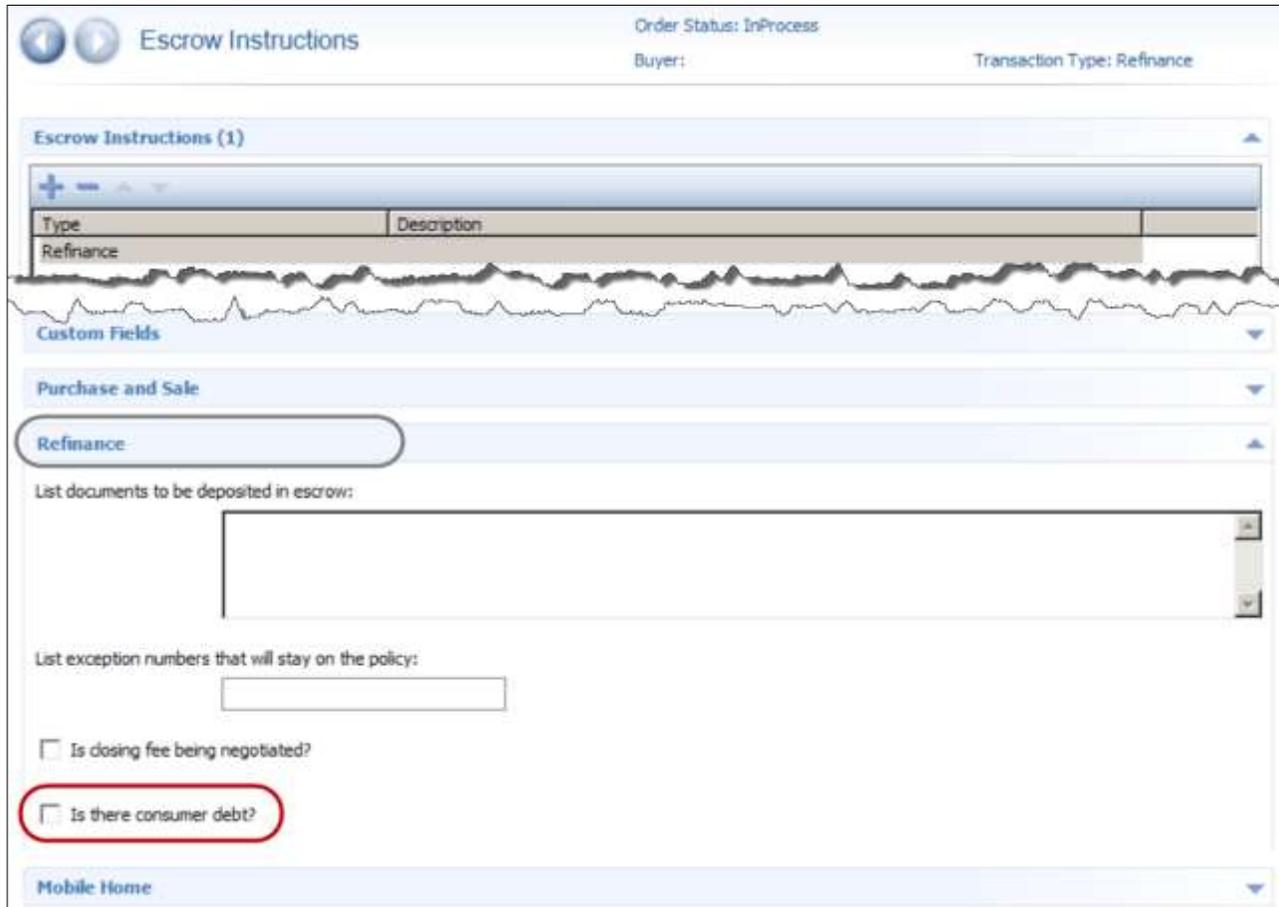
MY SCREENS

Escrow Instructions – Additional Field

NEW/MOD Mod	REQUESTED BY Carly Robidoux	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
----------------	--------------------------------	-------------------	------------	----------------------------

The custom field, Is there consumer debt? has been added to the Escrow Instructions screen below the Refinance more/less bar. This field is available when using My Screens:

- > IDMT All Screens
- > IDMT Escrow Screens



The screenshot shows the 'Escrow Instructions' screen with the following details:

- Order Status: InProcess
- Buyer: [blank]
- Transaction Type: Refinance
- Escrow Instructions (1) table with columns: Type, Description
- Custom Fields section expanded to 'Purchase and Sale' and 'Refinance'
- Form fields for 'List documents to be deposited in escrow:' and 'List exception numbers that will stay on the policy:'
- Checkboxes:
 - Is closing fee being negotiated?
 - Is there consumer debt? (highlighted with a red circle)
- Mobile Home button at the bottom

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FEBRUARY RELEASE NOTES

ILLINOIS

DOCUMENTS

Escrow

Attorney Agent Disclosure Statement

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	Downstate IL	N/A	436679	

Removed checkbox for Seller/Owner and Buyer. Form now pulls in T1 and A contacts where required. When calculating "Other Fees", any "RCF" and "RSE" fees will be excluded.

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Deed Request (Curphey and Badger)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	FT RLC / FT Metro	N/A	435175	

Updated to reflect the most current version.

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Personal Undertaking

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	State Counsel	N/A	443204	

Added 2 new paragraphs provided by State Counsel.

Nothing contained herein shall be construed so as to obligate the Company to issue Title Insurance Policy, in the form requested herein. However, should the Company issue any such Title Insurance Policy, it will do so in reliance upon the undertaking of the undersigned and the issuance of such Title Insurance Policy shall be the consideration for the above undertaking by the undersigned.

The Company shall have the right at any time hereinafter, after notice to the undersigned below, when it shall deem necessary, expedient, desirable or of interest to do so, in its sole discretion, to pay, discharge, satisfy or remove from the title to said real estate all or any of the items set out above. The undersigned covenants and agree to pay the Company all amounts so expended on demand.

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WireSafe Fraud Alert - CT METRO ONLY

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	CT Metro	N/A	436327	

Modified to look to the closing location and pulls the correct Trust Account information to the form.

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FEBRUARY RELEASE NOTES

Title

Affidavit (Non-Imputation - Individual)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
New	IL Counsel	N/A	441625	ILD0488.doc

New document. Render to view complete document.



Company Name

**NON-IMPUTATION AFFIDAVIT
INDIVIDUAL**

STATE OF _____

COUNTY OF _____

Affidavit and Indemnity
(Affiant to be personally liable on indemnity, e.g. a general partner)

The undersigned, being first duly sworn, on oath, deposes and says the following:

1. The undersigned is _____ [title or capacity] of _____

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FEBRUARY RELEASE NOTES

Affidavit (Non-Imputation - Multiple Parties)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
New	IL Counsel	N/A	441625	ILD0487.doc

New document. Render to view complete document.



Company Name

NON-IMPUTATION AFFIDAVIT
MULTIPLE PARTIES

STATE OF _____

COUNTY OF _____

Affidavit and Indemnity

The undersigned, being first duly sworn, on oath, deposes and says the following:

- The undersigned is _____ [title or capacity] of
_____ [name of entity].
- To the best knowledge of the undersigned,

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Later Date Exam - Revised

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	State Counsel	N/A	436676	

Updated to reflect the most current version provided by State Counsel.

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FEBRUARY RELEASE NOTES

SE 242 - Encroachment - Right to Maintain Improvements

SE 271 - Encroachment (Diminution)

SE 272 - Encroachment (Municipality)

SE 290 - Restrictions 4a

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	State Counsel	N/A	438247, 439242	

The countersignature block is now omitted from on these four *Encroachment* endorsements regardless of residential or commercial transaction.

In addition, the following was modified for two of the encroachment endorsements at the direction of State Counsel:
SE 271 - Changed "diminution of the value of the security shown in Schedule A" to "diminution of the value of the Title".
SE 272 - Changed this to the same language used in SE 242 with the additional municipal language.

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FEBRUARY RELEASE NOTES

REPORTS

Title Production				
NEW/MOD MOD	REQUESTED BY FT IL	FOOTPRINTS No(s).	TFS No(s). 4390114	FILE NAME (NEW ITEMS ONLY)
<ul style="list-style-type: none"> • Added new excel export with the following columns in this order <ul style="list-style-type: none"> ○ Order number {{Order.Number}} ○ Title opened - use current reports definition ○ Title completed - user current report definition ○ Resi/Comm - if {{Order.IsCommercial}} = True show as 'Comm' and if {{Order.IsCommercial}} = False show as 'Resi' ○ Settlement Agent - {{Order.SettlementAgents[1].Name}}, name of 1st settlement agent in the order ○ Completed by - use current report logic ○ Alpha/Lambda/Zeta - IL logic existing in report as a column ○ Turn Time - use current logic ○ On Hold - use current logic 				

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FEBRUARY RELEASE NOTES

INDIANA

DOCUMENTS

Escrow

Agreement (Final Tax Proration - NW)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	CT IN	N/A	435817	

Created new prompt to make item #4 optional:

Include item 4 which certifies sellers have done nothing to cause removal or reduction of exemptions

3. We accept the adjustments for the tax proration shown on the Settlement Statement as final.
4. Further, the Seller(s) of the above referenced property certify that in the last sixteen (16) months they have not refinanced; recorded a new deed; filed exemption on another property; or vacated the property and no longer use it as a primary residence. The Seller(s) certify to the Buyer and Fidelity Escrow Office Name that they have done nothing to cause the removal or reduction of exemptions on this property.

IN WITNESS WHEREOF, the undersigned have executed this document on the date(s) set forth below.

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FEBRUARY RELEASE NOTES

REPORTS

Policy Production				
NEW/MOD MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s). 433088	FILE NAME (NEW ITEMS ONLY)
<ul style="list-style-type: none">• Added new IN Start:<ul style="list-style-type: none">○ Checklist Task Contains 'Policy Requested' , search for checklist task %Policy Requested%• Added new IN Stop:<ul style="list-style-type: none">○ Checklist Task Contains 'Policy Issued', search for checklist task %Policy Issued%				

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FEBRUARY RELEASE NOTES

KANSAS

DOCUMENTS

Title

Commitment

NEW/MOD Mod	REQUESTED BY CT Kansas City	FOOTPRINTS No(s). N/A	TFS No(s). 438327	FILE NAME (NEW ITEMS ONLY)
-----------------------	---------------------------------------	---------------------------------	-----------------------------	-----------------------------------

Vendor Fees added to the Commitment. For Missouri properties this was added below Schedule B. For Kansas or Nebraska properties, Vendor fees were added to Schedule A.

END OF SCHEDULE B - SECTION II

ESTIMATED CHARGES

Based upon the information available to the Company at this time, we estimate that you will pay as part of your residential real estate transaction the following premiums, charges and/or fees:

NRC Quote No.: 12345	OWNERS POLICY	LOAN POLICY
1. Title Insurance Premium	\$1,080.00	\$475.00
2. Search/Exam/Curative Svc	\$416.00	\$208.00
Total Cost for Above	\$1,496.00	\$683.00

for MO Property

Additional Title Charges

Description	Charge	Policy
Loan Search Fee - Missouri	\$100.00	Loan Policy
Owner's Search Fee - Missouri	\$200.00	Owner's Policy
Additional Tract Charge	\$75.00	Loan Policy
Additional Tract Charge	\$150.00	Owner's Policy
Vendor Search Fee	\$33.00	Loan Policy
Vendor Search Fee	\$66.00	Owner's Policy

SCHEDULE A

ORDER NO. MS Test MO 1

Property Ref.: 100 Property Street, Kansas City, KS 64101

- Effective Date: February 14, 2018 at 07:59 AM
- Policy or Policies to be issued:
 - ALTA Owner's Policy 2006**
 Proposed Insured: Brian T. Buyer and Brenda T. Buyer
 Policy Amount: \$300,000.00
 Premium: \$1,080.00
 Additional Tract Charge: \$150.00
 Vendor Search Fee: \$66.00
 - ALTA Loan Policy 2006**
 Proposed Insured: Lender Bank & Trust, Proposed Insured Clause
 Policy Amount: \$250,000.00
 Premium: \$475.00
 Additional Tract Charge: \$75.00
 Vendor Search Fee: \$33.00

For KS or NE Property

Additional Title Charges

Description	Charge	Policy
Additional Tract Charge	\$75.00	Loan Policy
Additional Tract Charge	\$150.00	Owner's Policy
Vendor Search Fee	\$33.00	Loan Policy
Vendor Search Fee	\$66.00	Owner's Policy



FEBRUARY RELEASE NOTES

MICHIGAN

DOCUMENTS

Escrow

Affidavit (Estate Tax)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	CT MI	N/A	436685	

Updated form to the latest version provided by the Compliance Manager.

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FEBRUARY RELEASE NOTES

Title

Endorsements				
NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	MI State Counsel	N/A	440861	
Removed the Endorsement charge from being listed on the Endorsements.				

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FEBRUARY RELEASE NOTES

Letter (Final Policy)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
New	FRS MI	N/A	437645	MID1276.doc

New document. Render to view complete document.



Fidelity National Title*
Insurance Company

900 Wilshire Dr., Ste. 107
Troy, MI 48084
Phone: (248)404-9793 / Fax: (248)404-9794

Bob L. Buyer and Betty A. Buyer
1 Buyer Fwd Address
City, MI 86401

Date: January 29, 2018
File No.: JM CD Test
Property: 1 Property Address
Troy, MI 49503

Dear Bob L. Buyer and Betty A. Buyer:

Enclosed please find your Owner's Title Insurance Policy insuring the title to the property you recently purchased.

We want to congratulate you on your recent land purchase. Your Fidelity National Title Insurance Corp. Policy adds a dimension of security that you deserve as land owners.

This is a valuable document and should be kept in a secure place. If you should sell this property you may need to provide the new purchaser with a new Owner's Title Insurance Policy. This policy should be returned to Fidelity National Title Insurance Corp. and it may result in a cost saving credit for the new policy. If you have any questions regarding this policy please contact the policy department at (248)404-9793.

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Preliminary Title Report

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	Corporate Compliance	N/A	437759	

Added the Wire Fraud Notice to end of document.

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FEBRUARY RELEASE NOTES

MINNESOTA

DOCUMENTS

Escrow

Draw Summary

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
NEW	CT MN		430061	SSCORPD3012.spdoc - Draw Summary

New Report: Draw Summary

Location: MN Docs Tree

- Parameter screen
 - Drop down list of all construction draw. Default to most recent construction draw
 - Header (A)
 - "File Number:" = {{Order.Number}}
 - "Owner(s):" = {{Order.Buyers[1].Name}}, pull name of buyer/borrower 1
 - "General Contractors(2):" = {{Order.GeneralContractors[1].Name}}, pull name of General Contractor 1
 - "Property:" = {Order.Properties[1].Address.FullAddress}}, pull full address of property 1
- Body * - see below for grouping logic
 - "Draw Number:" = draw number select on parameter screen
 - "Project:" = {{Order.Project}}
 - "Approved BY:" = user name who approved draw selected
 - "On:" = date draw was approved on
 - "Agent Name:" = Name of payee
 - "Trade Code:" = Trade column from construction draw
 - "Draw Amount:" amount paid to contact on current draw
 - "Net Previous Paid:" = Previously paid column from current draw
 - "POC:" = POC column in current draw
 - "Lien Waiver:" = lien waiver from current draw
 - "Check Date:" = date of disbursement
- Summary
 - "Total Draw Amount:" = sum of current draw
 - "Receipts:" = sum of receipts associated with current draw
 - "Total Undisbursed:" = balance of draw

*-disbursement grouping: group by Contract Owner ({{{Order.GeneralContractors.ContractOwner}}} or {{{Order.Subcontractors.ContractOwner}}}) and bold name of Contract Owner, but if payee has no Contract Owner, print None in bold. Note that contact owner does not need to be a General Contract, but any contact in the file. Bold name of contract owner. Then list all the disbursements of sub-contracts to contract owner.

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FEBRUARY RELEASE NOTES

Lien Waiver Report

NEW/MOD NEW	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
<p>Title: Lien Waiver Report</p> <ul style="list-style-type: none"> • Parameter screen • “Construction Disbursement Payee” drop down <ul style="list-style-type: none"> ○ Options: <ul style="list-style-type: none"> ▪ All (default) ▪ General Contractor ▪ Only pull general contractor and sub-contractors • Header (A) – only show on page 1 of report <ul style="list-style-type: none"> ○ “Order Number:” = {{Order.Number}} ○ “Owner(S):” = {{Order.Buyers[1].Name}} <ul style="list-style-type: none"> ▪ Name of borrower 1 ○ “General Contractor(s):” = {{Order.GeneralContractors[1].Name}} <ul style="list-style-type: none"> ▪ Name of general contractor 1 ○ “Property Address:” = {{Order.Properties[1].Address.FullAddress}} <ul style="list-style-type: none"> ▪ Full address of property 1 ○ “Deposits Amount:” = Total of all deposits into all construction draws for order ○ “Order Project” = {Order.Project} display below property address • Body <ul style="list-style-type: none"> ○ Group by payee <ul style="list-style-type: none"> ▪ Payee Name and address ▪ “Role:” = order contact type, code ie Subcontractor (SC2) ▪ “Assigned to:” = contact owner name. suppress if contact type is a General Contractor ▪ Columns <ul style="list-style-type: none"> ▪ “Project” = draw description ▪ “Trade” = trade column from construction draw module ▪ Draw Amount” = payment amount on the construction draw ▪ “Total Paid” = total paid on current draw + previous draws ▪ “POC” = checkbox pulled from construction draw module ▪ “Lien Waiver” = lien waiver drop down value from construction draw module ▪ “Date Received” = comment column from construction draw module ○ Border <ul style="list-style-type: none"> ▪ Add border around each payees group of disbursements ▪ Add separator between each payee. This could be a darker boarder ▪ Don’t have page breaks in the middle of a payee. If draw list goes over one page, move to new page. • Footer (New section to be added) <ul style="list-style-type: none"> ▪ “Total Draws:” = highest draw number ▪ “Total Disbursed:” = sum of all disbursements across all draws • Add page number with the following format “Page 1 of 2” in the bottom right corner 				

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FEBRUARY RELEASE NOTES

FRS Tax Sheet

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
NEW	State Counsel	N/A	435179	MND1116.doc

New document. Render to view complete document.

Lien Search Name 100 Main Street, City, MN 15485 Phone: (800)333-4444 Fax: (801)333-4444	
File No.:	JM CD Test
Customer File No.:	RC123
Property Owner(s):	Sam E. Seller and Sally A. Seller
Property:	1 Property Address, City, MN 49503
Instructions:	
<ol style="list-style-type: none"> 1. If taxes will be prorated on a separate line on your Closing Disclosure Form for closing, they should be listed as a separate tax below. 2. Name and address of Tax Office should be who a check would be payable to and where that check would be mailed. 3. For each tax section, check all boxes that apply. 4. Please note by checking boxes if multiple tax types are paid together - (i.e. County includes county, school, city, etc.) 5. Provide information concerning any type of tax, assessment, supplemental or utility that could become lienable against the property and collected at time of closing. 6. Please attach any backup you deem appropriate. 	

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FEBRUARY RELEASE NOTES

Title

Endorsements				
NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
New	CT MN	N/A	436559	
New Endorsements added: SE 350/374 and SE384				

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FEBRUARY RELEASE NOTES

REPORTS

Monthly Disbursed Draws				
NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
NEW	CT MN		429668	SSCORP5335.rpt - Monthly Disbursed Draws
<p>General: Title – Monthly Disbursed Draws Tree location – Trust Accounting Folder</p> <p>Parameters:</p> <ul style="list-style-type: none"> • Construction draw disbursement date from <ul style="list-style-type: none"> ○ Default to 1st day of prior month • Construction draw disbursement date through <ul style="list-style-type: none"> ○ Default to last day of prior month • Show report programming notes • Report comments <p>Groups:</p> <ul style="list-style-type: none"> • Order Number <p>Columns:</p> <ul style="list-style-type: none"> • GF No.: = {{Order.Number}} • Draw # = draw number disbursement was from • Project = {{Order.Project}} • Disbursement Date = Check Date or Transaction Date for non-checks • Created By = user who created the draw • Total Draw Amount = sum of all receipts associated with draw • Total Disbursed = Sum of all disbursements in draw during the date range • Draw Balance = (total draw amount column) – (total disbursed column) • Escrow Balance = ledger balance of register (current balance) <p>Totals:</p> <ul style="list-style-type: none"> • Total number of draws <p>Sorting:</p> <ul style="list-style-type: none"> • Order Number <p>Logic:</p> <ul style="list-style-type: none"> • Report will show all files where a disbursement is made from a construction draw during the date range. 				

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Out of State Orders				
NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
NEW			430126	
<p>General: Title – Out of State Orders</p>				

Prepared By: ISG



FEBRUARY RELEASE NOTES

Tree location – MN Order Reports

Parameters:

- Received date from {{Order.ReceivedDate}}
- Received date through {{Order.ReceivedDate}}
- **Group 1 by drop Down**
 - **Options:**
 - **Branch (Default)**
 - **Escrow Officer**
 - **Escrow Assistant**
- **Group 2 by drop Down**
 - **Options:**
 - **Branch**
 - **Escrow Officer (Default)**
 - **Escrow Assistant**
- Show report programming notes
- Report comments

Groups:

- Branch
- Escrow Officer

Columns:

- Order Number {{Order.Number}}
- Transaction Type {{Order.TransactionType}}
- Order Type {{Order.Type}}
- Product Type {{Order.ProductType}}
- Property Address {{Order.Property.Address.FullAddress}}
 - List all address in file
- Title Office Address
 - Pull full address of contact selected as Title Office {{Order.Title.Office}}
- Escrow Office Address
 - Pull full address of contact selected as Escrow Office {{Order.Escrow.Office}}
- Revenue pull are fees payable to revenue contact and list as sum
 - If revenue is pending, add '*' and a note in the report footer that '*' means pending revenue

Totals:

- Branch Total
- Escrow Officer/Escrow Assistant
- Report total

Sorting:

- Order number

Logic:

- Show all orders received within the date range
- Out of State Logic
 - Property State and Title Office <> profile state or
 - Use property 1
 - Escrow Office State <> Profile and Property State = Profile State
 - Use property 1

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FEBRUARY RELEASE NOTES

Title Production				
NEW/MOD MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s). 433084	FILE NAME (NEW ITEMS ONLY)
<ul style="list-style-type: none">• Added new MN Start:<ul style="list-style-type: none">○ Checklist Task Contains 'Order processing completed' , search for checklist task %Order processing completed%○ Checklist Task Contains 'Examiner Assigned' , search for checklist task %Examiner Assigned%• Added new MN Stop:<ul style="list-style-type: none">○ Checklist Task Contains 'Examiner Assigned' , search for checklist task %Examiner Assigned%○ Checklist Task Contains 'Commitment out', search for checklist task %Commitment out%				

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FEBRUARY RELEASE NOTES

MISSOURI

DOCUMENTS

Escrow

Corporate Invoice				
NEW/MOD MOD	REQUESTED BY CT KS	FOOTPRINTS No(s).	TFS No(s). 435627	FILE NAME (NEW ITEMS ONLY)
<ul style="list-style-type: none"> • ATC with Bill code SEA associated to a policy that are sent to the same invoice are included in the policy detail <ul style="list-style-type: none"> ○ only applies to CSS order ○ only applies to owner profile: <ul style="list-style-type: none"> ▪ Default\PMO\CPU\CT Kansas City\711 Commercial ▪ Default\TXCTKC Training 				

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FEBRUARY RELEASE NOTES

Title

Commitment

NEW/MOD Mod	REQUESTED BY CT Kansas City	FOOTPRINTS No(s). N/A	TFS No(s). 438327	FILE NAME (NEW ITEMS ONLY)
-----------------------	---------------------------------------	---------------------------------	-----------------------------	-----------------------------------

Vendor Fees added to the Commitment. For Missouri properties this was added below Schedule B. For Kansas or Nebraska properties, Vendor fees were added to Schedule A.

END OF SCHEDULE B - SECTION II

ESTIMATED CHARGES

Based upon the information available to the Company at this time, we estimate that you will pay as part of your residential real estate transaction the following premiums, charges and/or fees:

NRC Quote No.: 12345	OWNERS POLICY	LOAN POLICY
1. Title Insurance Premium	\$1,080.00	\$475.00
2. Search/Exam/Curative Svc	\$416.00	\$208.00
Total Cost for Above	\$1,496.00	\$683.00

for MO Property

Additional Title Charges

Description	Charge	Policy
Loan Search Fee - Missouri	\$100.00	Loan Policy
Owner's Search Fee - Missouri	\$200.00	Owner's Policy
Additional Tract Charge	\$75.00	Loan Policy
Additional Tract Charge	\$150.00	Owner's Policy
Vendor Search Fee	\$33.00	Loan Policy
Vendor Search Fee	\$66.00	Owner's Policy

SCHEDULE A

ORDER NO. MS Test MO 1

Property Ref.: 100 Property Street, Kansas City, KS 64101

1. Effective Date: February 14, 2018 at 07:59 AM
2. Policy or Policies to be issued:
 - a. ALTA Owner's Policy 2006

Proposed Insured: Brian T. Buyer and Brenda T. Buyer
 Policy Amount: \$300,000.00
 Premium: \$1,080.00
 Additional Tract Charge: \$150.00
 Vendor Search Fee: \$66.00
 - b. ALTA Loan Policy 2006

Proposed Insured: Lender Bank & Trust, Proposed Insured Clause
 Policy Amount: \$250,000.00
 Premium: \$475.00
 Additional Tract Charge: \$75.00
 Vendor Search Fee: \$33.00

For KS or NE Property

Additional Title Charges

Description	Charge	Policy
Additional Tract Charge	\$75.00	Loan Policy
Additional Tract Charge	\$150.00	Owner's Policy
Vendor Search Fee	\$33.00	Loan Policy
Vendor Search Fee	\$66.00	Owner's Policy

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FEBRUARY RELEASE NOTES

REPORTS

Policy Production				
NEW/MOD MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s). 433088	FILE NAME (NEW ITEMS ONLY)
<ul style="list-style-type: none">• Added new MO Start:<ul style="list-style-type: none">○ Checklist Task Contains 'Policy Requested', search for checklist task %Policy Requested%%• Added new MO Stop:<ul style="list-style-type: none">○ Checklist Task Contains 'Policy Issued', search for checklist task %Policy Issued%				

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MONTANA

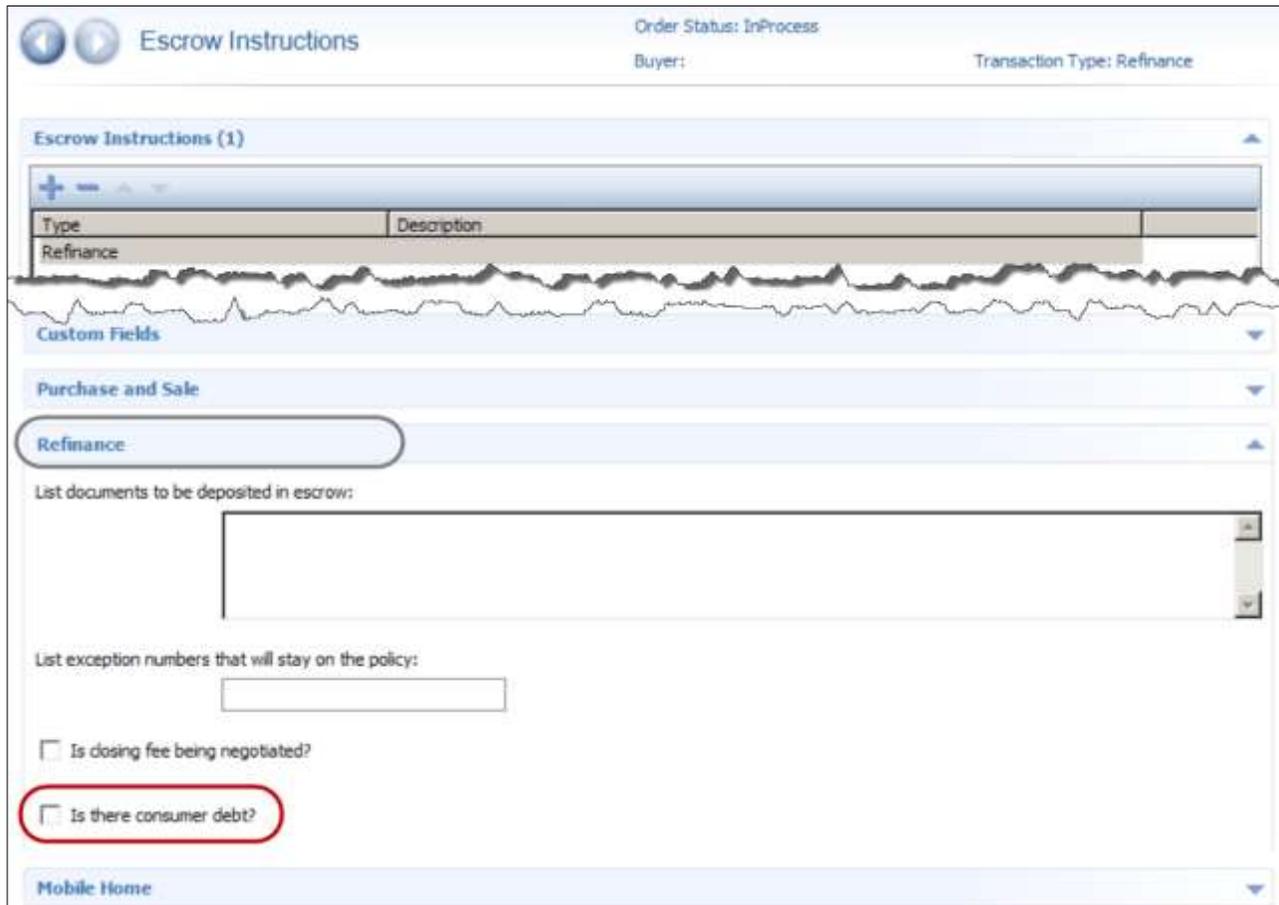
MY SCREENS

Escrow Instructions – Additional Field

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	Carly Robidoux			

The custom field, Is there consumer debt? has been added to the Escrow Instructions screen below the Refinance more/less bar. This field is available when using My Screens:

- > IDMT All Screens
- > IDMT Escrow Screens



The screenshot shows the 'Escrow Instructions' screen with the following details:

- Order Status: InProcess
- Buyer: [blank]
- Transaction Type: Refinance
- Escrow Instructions (1) table with columns: Type, Description
- Custom Fields section containing:
 - Purchase and Sale
 - Refinance (highlighted)
 - List documents to be deposited in escrow: [text area]
 - List exception numbers that will stay on the policy: [text area]
 - Is closing fee being negotiated?
 - Is there consumer debt? (highlighted with a red circle)
- Mobile Home [dropdown menu]

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FEBRUARY RELEASE NOTES

NEBRASKA

DOCUMENTS

Title

Commitment

NEW/MOD Mod	REQUESTED BY CT Kansas City	FOOTPRINTS No(s). N/A	TFS No(s). 438327	FILE NAME (NEW ITEMS ONLY)
-----------------------	---------------------------------------	---------------------------------	-----------------------------	-----------------------------------

Vendor Fees added to the Commitment. For Missouri properties this was added below Schedule B. For Kansas or Nebraska properties, Vendor fees were added to Schedule A.

END OF SCHEDULE B - SECTION II

ESTIMATED CHARGES

Based upon the information available to the Company at this time, we estimate that you will pay as part of your residential real estate transaction the following premiums, charges and/or fees:

NRC Quote No.: 12345	OWNERS POLICY	LOAN POLICY
1. Title Insurance Premium	\$1,080.00	\$475.00
2. Search/Exam/Curative Svc	\$416.00	\$208.00
Total Cost for Above	\$1,496.00	\$683.00

for MO Property

Additional Title Charges

Description	Charge	Policy
Loan Search Fee - Missouri	\$100.00	Loan Policy
Owner's Search Fee - Missouri	\$200.00	Owner's Policy
Additional Tract Charge	\$75.00	Loan Policy
Additional Tract Charge	\$150.00	Owner's Policy
Vendor Search Fee	\$33.00	Loan Policy
Vendor Search Fee	\$66.00	Owner's Policy

SCHEDULE A

ORDER NO. MS Test MO 1

Property Ref.: 100 Property Street, Kansas City, KS 64101

- Effective Date: February 14, 2018 at 07:59 AM
- Policy or Policies to be issued:
 - ALTA Owner's Policy 2006**
 Proposed Insured: Brian T. Buyer and Brenda T. Buyer
 Policy Amount: \$300,000.00
 Premium: \$1,080.00
 Additional Tract Charge: \$150.00
 Vendor Search Fee: \$66.00
 - ALTA Loan Policy 2006**
 Proposed Insured: Lender Bank & Trust, Proposed Insured Clause
 Policy Amount: \$250,000.00
 Premium: \$475.00
 Additional Tract Charge: \$75.00
 Vendor Search Fee: \$33.00

For KS or NE Property

Additional Title Charges

Description	Charge	Policy
Additional Tract Charge	\$75.00	Loan Policy
Additional Tract Charge	\$150.00	Owner's Policy
Vendor Search Fee	\$33.00	Loan Policy
Vendor Search Fee	\$66.00	Owner's Policy

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FEBRUARY RELEASE NOTES



FEBRUARY RELEASE NOTES

NEW MEXICO

DOCUMENTS

Escrow

Wire Information

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	FT NM	N/A	435812	

Added the WireSafe logo for "Title only" files.

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FEBRUARY RELEASE NOTES

REPORTS

1099-S Exceptions				
NEW/MOD MOD	REQUESTED BY FT NM	FOOTPRINTS No(s).	TFS No(s). 436628	FILE NAME (NEW ITEMS ONLY)
<ul style="list-style-type: none">• If SSN number begins with "000" will flag as exception "Invalid TAXID/SSN" exception.<ul style="list-style-type: none">○ Added sub-note to "Invalid TAXID/SSN" exception note on programming notes that this exception will include SSN's that begin "000" (zero, zero, zero)				

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FEBRUARY RELEASE NOTES

NORTH CAROLINA

DOCUMENTS

Escrow

Corporate Invoice				
NEW/MOD MOD	REQUESTED BY NC	FOOTPRINTS No(s). N/A	TFS No(s). 436519	FILE NAME (NEW ITEMS ONLY)
<ul style="list-style-type: none">• Invoice will suppress escrow office when for owning profile path of NC\FT.				

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FEBRUARY RELEASE NOTES

REPORTS

New Report				
NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)

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FEBRUARY RELEASE NOTES

OHIO

DOCUMENTS

Escrow

Wire Information

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	CT OH	N/A	436317	

Added language to the PLEASE NOTE section for Ohio operations:

PLEASE VERBALLY VERIFY THESE WIRE INSTRUCTIONS WITH (ESCROW OFFICER).

IF YOU RECEIVE ANOTHER EMAIL OR UNSOLICITED CALL PURPORTING TO ALTER THESE INSTRUCTIONS, PLEASE IMMEDIATELY CALL YOUR ESCROW OFFICER AT (ESCROW OFFICER'S PHONE NUMBER).

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FEBRUARY RELEASE NOTES

REPORTS

Orders by Selection				
NEW/MOD MOD	REQUESTED BY CT OH	FOOTPRINTS No(s).	TFS No(s). 435348	FILE NAME (NEW ITEMS ONLY)
<ul style="list-style-type: none"> • On export format = 'Excel-OH2' added the following three columns at the end of the excel export <ul style="list-style-type: none"> ○ 'Title Premium' = sum of all owners and lenders policy premium in the order {{Order.Title.TitleInsuranceCalculations.OwnersPolicy.PremiumCalculation.FinalPremium}} + {{Order.Title.TitleInsuranceCalculations.LoanPolicy.PremiumCalculation.FinalPremium}} ○ 'Endorsement Premium' = sum of all endorsement premium in the order (owners and lenders){{Order.Title.TitleInsuranceCalculations.LoanPolicy.Endorsements.ChargeCalculation.FinalCharge}} + +{{Order.Title.TitleInsuranceCalculations.OwnersPolicy.Endorsements.ChargeCalculation.FinalCharge}} ○ 'Total Premium' = sum of title premium and endorsement premium columns 				

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FEBRUARY RELEASE NOTES

OKLAHOMA

DOCUMENTS

Escrow

Affidavit (Owner's)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
New	Regional Counsel	N/A	435815	OKD1185.doc

New document. Render to view complete document.

OWNER'S AFFIDAVIT

STATE OF _____ Order No.: CarlyTest-NY-JDK

COUNTY OF _____

The undersigned, being first duly sworn on oath, hereby deposes and says that, to the best of his/her personal knowledge, the following statements are true and complete in every respect:

1. The undersigned is the [President of Seller Company, Inc.](#) ("Owner"), has personal knowledge of the facts stated herein, and is authorized to make this Affidavit on behalf of the Owner. The Owner is duly organized and validly existing under the laws of the State of [Oklahoma](#). The Owner is the fee owner of certain premises situated in the City of [Broken Arrow](#), County of [Tulsa](#), State of [Oklahoma](#) described in Commitment No. [48593439](#), NCS File No. [CarlyTest-NY](#).
2. No other persons have any interest and title, in equity or otherwise, in and to said premises except as hereinafter stated and the deponent is not holding title for another in fulfillment of any trust or agreement, or for the benefit of any other person, firm or corporation.

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FEBRUARY RELEASE NOTES

Policy Instructions

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	Cleveland County Abstract	N/A	435177	

Added space between labels/categories.



Company Name

POLICY INSTRUCTIONS

Branch: CCAO-005

File No.: JM CD Test-JDK

Closing: February 12, 2018

Buyer: Bob L. Buyer and Betty A. Buyer

Seller: Sam E. Seller and Sally A. Seller

Lender: Leonard's Lending Services
Chase Bank

County: Adams

Legal: Property 1 Commitment Legal goes here

Vesting: From commitment

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WireSafe Fraud Alert

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	CT OK	N/A	435182	

Added the privacy statement to end of document.

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FEBRUARY RELEASE NOTES

OREGON

DOCUMENTS

Escrow

Construction Liens CCB HPA

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
New	LT Portland	N/A	438241	ORD1465.doc

New document. Render to view complete document.

**NOTICE OF COMPLIANCE WITH THE
HOMEBUYER PROTECTION ACT (HPA)
(ORS 87.007)**

In compliance with Oregon law, the below mentioned **Seller** has selected to comply with the requirements of ORS 87.007.

1. ADDRESS or DESCRIPTION OF PROPERTY		
Address or Location	City, State	Zip Code
1 Property Address	Portland, OR	49503

2. DATE OF PURCHASE (CHOOSE ONE)
A. <input type="checkbox"/> ORS 87.007 (which include the provisions listed in part B of this form) does not apply to the sale of the above described Property .
B. <input type="checkbox"/> ORS 87.007 applies to the sale of the above described Property . Seller complied with ORS 87.007(2) by (check which <u>one</u> applies):
1. <input type="checkbox"/> Title Insurance as provided for in ORS 87.007(2)(a).
2. <input type="checkbox"/> Retained in Escrow not less than 25 percent of the sale price as provided for in ORS 87.007(2)(b).
3. <input type="checkbox"/> Bond or Letter of Credit as provided for in ORS 87.007(2)(c).
4. <input type="checkbox"/> Written Waivers received from every person claiming a lien as provided for in ORS 87.007(2)(d).
5. <input type="checkbox"/> Completed Sale After the Deadline for perfecting liens as provided for in ORS 87.007(2)(e).

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FEBRUARY RELEASE NOTES

EI - Sale (EIS)

EI - Sale (EIS - Legal)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	Western Title	N/A	435162	

Added prompt to allow user to choose whether or not to show the section shown.

Sale

Exclude disbursement instruction

If this prompt is checked, this section will no longer

TRANSFER All Net Proceeds, or \$ _____

TO: _____

ATTN: _____

Seller proceeds, or balance thereof, at closing shall be delivered as follows:

Mail Hold for Pick Up Deposit to Account:

Bank: _____

Account No.: _____

Account Name: _____

ABA Routing No.: _____

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Letter (Tax Payment Transmittal)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
New	Western Title	N/A	436683	ORD1464.doc

New document. Render to view complete document.

100 Main Street
Place, OR 92025
Phone: (800)111-2222 / Fax: (800)222-3333

Company Name

Bob Smith
Government Contact Name
100 Taxes Blvd
Someplace, OR 48545

Date: January 26, 2018
Title No.: T2
Escrow No.: JM CD Test-MGS
Seller(s): Sam E. Seller and Sally A. Seller
Property: 2 Property Address
Portland, OR 45785
Tax Acct: 22-890

To Whom It May Concern:

Enclosed please find our Check No. 980 in the amount of Four Thousand Five Hundred Seventy-Five And 25/100 Dollars (\$4,575.25) for payment of the above referenced tax account.

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FEBRUARY RELEASE NOTES

Notice (Completion)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	Western Title	N/A	440912	

Added the General Contractor, Subcontractor, Builder, Buyer, Seller, Other or Lender to be available in the signature section.

IN WITNESS WHEREOF, the undersigned have executed this document on the date(s) set forth below.

Dated: **February 8, 2018**

All About Gutters

Signature

By: **John L. Doe** _____

Print Name

Its: **GC** _____

Print Title

Please select who is to sign this form

Subcontractor

Builder

Buyer

General Contractor

Lender

Other

Seller

Subcontractor

Address: _____

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FEBRUARY RELEASE NOTES

Title

DHS Estate Administration

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	Western Title	N/A	440914	

Revised to show full SSN for the decedent.

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Preliminary Report

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	Corporate Compliance	N/A	437763	

Added the Wire Fraud Notice to end of document.

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Preliminary Report

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	Western Title	N/A	438781	

Added new coding to automatically pull in items from the Additional Charges screen that have a description of "Additional Charge to remove Standard Exception".

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FEBRUARY RELEASE NOTES

TEXAS

DOCUMENTS

Escrow

Affidavit (Refinance of Prior Home Equity Loan Compliance)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
New	State Underwriting Bulletin		436609	SSTXD00261.doc

New document. Render to view complete document.

REFINANCE OF PRIOR HOME EQUITY LOAN COMPLIANCE AFFIDAVIT (For Use In Insuring a Traditional Refinance of a Prior HEL Pursuant to Article XVI, §50 (f) (2), Texas Constitution)	
Date:	January 26, 2018
GF No.:	JJ TX Test
Underwriter:	Commonwealth Land Title Insurance Company
Title Agent:	Chicago Title Insurance Company
Owner and Spouse, if any (hereinafter "Affiant"):	Stephen T. Seller, Stephanie T. Seller, Second Seller and Third Seller
Lender:	Lender Bank & Trust
Property:	100 Property Street, Fort Worth, TX 76101
Affiant on oath swears that the following statements are true:	
1. I am the owner of the Property, or the spouse of Owner, I am over the age of eighteen (18) years, and I am fully competent to execute this affidavit.	

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Letter (HOA 60 Day)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
MOD	Charter Title Company		438800	

Added the borrower's names to the top right section.

Leonard's Lending Services 111 Lending Ln. Alamo, TX 86404	Date: February 1, 2018 GF#: FTIN-JM CD Test Borrower(s): Bob L. Buyer and Betty A. Buyer Property Address: 1 Property Address, City, TX 49503
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FEBRUARY RELEASE NOTES

Medical Certification (POA)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
MOD	Elise Kitchens		437626	

Revised document to pull the Settlement Agent addressee information.

EXHIBIT C MEDICAL CERTIFICATION (As to competency of Principal executing a Power of Attorney)	
<p>Melissa G. Smith, Closing Specialist Escrow Office Name 100 Main Street Place, TX 92025 Phone: (800)111-2222 Fax: (800)222-3333</p>	<p>Date: February 12, 2018 GF No.: FTIN-JM CD Test</p>

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FEBRUARY RELEASE NOTES

REPORTS

Dallas CPF Update/Policy Fallout

NEW/MOD MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
			436899	
<ul style="list-style-type: none"> Updated task to look for just "%Policy Typed%"(remove the "completed" part) 				

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HOI Data Sheet

NEW/MOD MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
	FT TX		433553	
<ul style="list-style-type: none"> On the export Owners Policy Premium (column J) and Lenders Policy Premium (column M) need to include the endorsements that are attached to their respective policies. <ul style="list-style-type: none"> Endorsements screen will show the endorsements per policy. Find total of all endorsements and add to the premium column for each policy. 				

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Opened/Closed Orders by Selection

NEW/MOD MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
	CT TX		438399	
<ul style="list-style-type: none"> If profile = Default\P\TX\South Texas CPF\HOU\CHARTER TITLE + Descendants, then do the following: <ul style="list-style-type: none"> Suppress: Title Officer/Examiner, Escrow Office and Ref. Number columns Separate Marketing Source/Mkt Info into three separate column as 'Marketing Source Name', 'Main Contact Name', 'Mkt Info' 				

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Order Exceptions

NEW/MOD MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
	CT TX		438417	
<ul style="list-style-type: none"> If profile = Default\P\TX\South Texas CPF\HOU\CHARTER TITLE + Descendants, report will do the following: <ul style="list-style-type: none"> 'Missing Buyer Current address' will be shown as an exception for closed orders only. Currently this shows for open. Updated and added to programming notes that the open exception doesn't apply to open order for Charter and the closed order exception is only for Charter Title. 'Missing Title Officer/Examiner' will be shown as an exception for closed orders only. Currently this shows for open. Updated and added to programming notes that the open exception doesn't apply to open order for Charter and the closed order exception is only for Charter Title. 				

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FEBRUARY RELEASE NOTES

Orders Not Submitted/Received

NEW/MOD MOD	REQUESTED BY CT TX	FOOTPRINTS No(s).	TFS No(s). 438406	FILE NAME (NEW ITEMS ONLY)
<ul style="list-style-type: none">Report will not include orders where owning profile = Default\P\TX\South Texas CPF\HOU\CHARTER TITLE\CHT\ESC\7655 Downtown				

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FEBRUARY RELEASE NOTES

MY SCREENS

Express Order Entry – Additional Field

NEW/MOD Mod	REQUESTED BY Lisa Simmons	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
----------------	------------------------------	-------------------	------------	----------------------------

The custom field, Resi/Comm Transaction Desc. has been added to the Express Order Entry screen. This field is available when using My Screens:

- > Texas Escrow Screens
- > TX Commercial CSS

The screenshot shows the 'Express Order Entry' interface. At the top, it displays 'Order Status: InProcess', 'Buyer:', and 'Transaction Type: Purchase'. Below this, there are sections for 'Transaction type' (with radio buttons for Purchase, Refinance, Equity, Other), 'Commercial' checkboxes (Commercial, Construction, Cash sale, Out of county), and 'Order type', 'Product type', and 'Policy type' dropdown menus. The 'Escrow Status' section includes 'Date/time escrow opened' (02/15/2018 09:34 AM) and 'Opened by' (Susan Rivera-Stoll). A 'Resi/Comm Transaction Desc.' field is highlighted with a red circle, and its dropdown menu is open, listing various property types such as '1-4 Family Residence', 'Apt. Building - Condo Project - Other Multi-Fam Reside...', 'Condo Unit', 'Hotel or Motel', 'Industrial Building', 'Multi-Use Building', 'Office Building', 'Other', 'Retail - Store, Shopping Center or Mall', 'Unimproved Commercial', 'Unimproved Land', and 'Unimproved Residential'. A 'Brand' dropdown menu is also visible below the escrow status section.

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FEBRUARY RELEASE NOTES

WASHINGTON

DOCUMENTS

Escrow

Closing Order and Recording Instructions

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	WA	N/A	437629	

Revised document to not rely on a Loan Policy amount in order to pull the Security Instruments to the document.

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Questionnaire

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	CT Vancouver	N/A	437642	

Added additional verbiage:

Will you be doing a Tax Deferred Exchange? Yes No If your answer is yes:

Company Name and Phone: _____

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Title

Master Commitment with Attachments

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	Corporate Compliance	N/A	442647	

Added the Wire Fraud Notice to document above the Privacy Statement.

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FEBRUARY RELEASE NOTES

REPORTS

EPU Task Summary/Productivity by County Manager				
NEW/MOD MOD	REQUESTED BY FT WA	FOOTPRINTS No(s).	TFS No(s). 434693	FILE NAME (NEW ITEMS ONLY)
<ul style="list-style-type: none"> • Added the following tasks to the task custom view (cvw_EPUPTaskList_FNF.view.sql) <ul style="list-style-type: none"> ○ Task Contain 'TC' and 'Title Clearing Requested' Look for "%Title Clearing Requested%" and %TC% ○ Task Contain 'TC' and 'Title Clearing In Process' Look for "%Title Clearing In Process%" and %TC% ○ Task Contain 'TC' and 'Title Clearing Update Requested' Look for "%Title Clearing Update Requested%" and %TC% ○ Task Contain 'TC' and 'Title Clearing Update In Process' Look for "%Title Clearing Update in Process%" and %TC% • Added all six tasks to show as total columns at the end of the report when task columns to display dropdown VEPU, Vancouver EPU has been selected on county manager report <ul style="list-style-type: none"> ○ Title Clearing Requested ○ Title Clearing In Process ○ Title Clearing Update Requested ○ Title Clearing Update In Process ○ Title Cleared & Returned to Escrow Unit ○ Title NOT Cleared & Returned to Escrow 				

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FEBRUARY RELEASE NOTES

WISCONSIN

REPORTS

3 Year Trending

NEW/MOD MOD	REQUESTED BY CT WI	FOOTPRINTS No(s).	TFS No(s). 436584	FILE NAME (NEW ITEMS ONLY)
<ul style="list-style-type: none"> Added a prompt between format for excel and contact file called "Commercial/Residential Filter" drop down with the following options <ul style="list-style-type: none"> Commercial and Residential (default) = return all orders Commercial Only = will only return orders where {{Order.IsCommercial}} checkbox = true Residential Only = will only return orders where {{Order.IsCommercial}} checkbox = false 				

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In Process Pipeline

NEW/MOD NEW	REQUESTED BY FT WI	FOOTPRINTS No(s).	TFS No(s). 437621	FILE NAME (NEW ITEMS ONLY) SSCORP5340.rpt - In Process/Pipeline Orders
<p>General: Title – In Process/Pipeline Orders Tree location – Order Report (WI and IN)</p> <p>Parameters:</p> <ul style="list-style-type: none"> Group by Drop-Down, with the following options <ul style="list-style-type: none"> Branch Branch, Escrow Officer Escrow Officer Marketing Source Company (default) Sales Rep-separated Sales Rep-combined None Commercial/Residential Filter dropdown, with the following options <ul style="list-style-type: none"> Commercial and Residential (default) Commercial Only = only return orders where {{Order.IsCommercial}} checkbox is true Residential Only = only return orders where {{Order.IsCommercial}} checkbox is false Include Pending Revenue Checkbox (default to be checked) Format results for excel checkbox Mkt source code or name contains text box Mkt Info (pager) contains text box Branch picklist Escrow officer picklist Sales Rep picklist Order type picklist Product Type picklist Transaction type picklist Show report programming notes Report comments <p>Groups:</p> <ul style="list-style-type: none"> Based on group by drop down 				



FEBRUARY RELEASE NOTES

Columns:

- Order number {{Order.Number}}
- Transaction Type {{Order.TransactionType}}
- Order Type {{Order.Type}}
- Product Type {{Order.ProductType}}
- Opened Date {{order.ReceivedDate}}
- Sales Rep = just pull in first sales rep
- Marketing Source (show all in the file)
- Mkt Info
- Revenue – show pending revenue with '*' and add note to footer that rev with '*' is pending
- Liability
- Order Status = {{Order.Status}}

Totals:

- Per group and report for the following
 - o Total Orders
 - o Total Transaction Type
 - o Total Order Type
 - o Total Product Type
 - o Total Revenue
 - o Total Liability

Sorting:

- Group by option first, then
- Order number
 - o If none is selected on group by drop down just sort by order number

Logic:

- Report will run for all order where order status {{Order.Status}} = In Process or Hold or Blank

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FEBRUARY RELEASE NOTES

TECHNICAL NOTES (FOR LOCAL IT/SUPPORT)

DOCUMENTS

Any new documents in this build are listed in the Title and/or Escrow User Release Notes. Due to the state-specific "All Documents" tree, these new documents are automatically available to the users upon the push to test or production.

However, those new documents may also need to be added to the operation specific tree(s) for packaging and other purposes. This is at your discretion.