

# SOFTPRO SELECT

## RELEASE NOTES



MARCH, 2015

Testing Release Date: March 5, 2015

Production Release Date: March 20, 2015



# MARCH RELEASE NOTES

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# MARCH RELEASE NOTES

## REPORTS

**\*Modifications listed below are for SoftPro Select 3.0 unless otherwise noted\***

<b>Closed Orders</b>				
<b>NEW/MOD</b>	<b>REQUESTED BY</b>	<b>FOOTPRINTS No(s).</b>	<b>TFS No(s).</b>	<b>FILE NAME (NEW ITEMS ONLY)</b>
MOD	CT San Diego	N/A	240836	
<ul style="list-style-type: none"> <li>Added LTI revenue to pull with ESC revenue</li> <li>Added LTI under Escrow revenue in column header</li> </ul>				

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<b>Escrow Trial Balance</b>				
<b>NEW/MOD</b>	<b>REQUESTED BY</b>	<b>FOOTPRINTS No(s).</b>	<b>TFS No(s).</b>	<b>FILE NAME (NEW ITEMS ONLY)</b>
MOD	CT Chicago Metro	N/A	241116	
<ul style="list-style-type: none"> <li>Added free-text filter after Ledger comment contains for "Order number ends with" ---for example, if user enters "BC", then orders 123ABC and 987BC should be returned</li> </ul>				

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<b>Fee Ticket {Batch}</b>				
<b>NEW/MOD</b>	<b>REQUESTED BY</b>	<b>FOOTPRINTS No(s).</b>	<b>TFS No(s).</b>	<b>FILE NAME (NEW ITEMS ONLY)</b>
MOD	Houston OAC	N/A	245826	
<ul style="list-style-type: none"> <li>Added checkbox after Include bill code summary grid for "Include adjustment-only Fee Tickets"; default checked; when checked, include Fee Tickets with original posting date outside the date range but adjustments inside the date range (current functionality); when unchecked, only Fee Tickets with original posting date in the date range should be included</li> </ul>				

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<b>Fees by Selection</b>				
<b>NEW/MOD</b>	<b>REQUESTED BY</b>	<b>FOOTPRINTS No(s).</b>	<b>TFS No(s).</b>	<b>FILE NAME (NEW ITEMS ONLY)</b>
MOD	CT Ventura	N/A	236704	
<ul style="list-style-type: none"> <li>Added product type picklist</li> <li>Corrected typo on the Order transaction type picklist</li> <li>Updated Product Type column Excel export to display Product Type description, not code</li> <li>Added dropdown above Bill Code picklist for "Bill Code filter"; options are: All Bill Codes (default); Non-Revenue Bill Codes; Revenue Bill Codes</li> <li>Updated the Bill Code picklist based on the selection; the report should define "Revenue bill codes" based on the profile-specific revenue definition</li> <li>Added option to Group by drop down for "Settlement Agent" (display lookup code and company name when grouped by Settlement Agent contact)</li> </ul>				

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<b>IBA Detail by Bank and Escrow</b>				
<b>NEW/MOD</b>	<b>REQUESTED BY</b>	<b>FOOTPRINTS No(s).</b>	<b>TFS No(s).</b>	<b>FILE NAME (NEW ITEMS ONLY)</b>
MOD	CT Chicago Metro	N/A	241279	
<ul style="list-style-type: none"> <li>Added column after IBA Type for "Maturity Date"</li> <li>Added columns after Payee Name for: Misc Credit; Interest Credit; Misc Debit (show a total per Account Number, no new rows on the report)</li> <li>Added the above-requested columns (4 total) to the Excel export (in the same order as the non-Excel report)</li> <li>Added dropdown after IBA bank for "IBA status"; options are "Open and Closed" (default); "Open Only"; "Closed Only"</li> </ul>				

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<b>Lookup Table Search</b>				
<b>NEW/MOD</b>	<b>REQUESTED BY</b>	<b>FOOTPRINTS No(s).</b>	<b>TFS No(s).</b>	<b>FILE NAME (NEW ITEMS ONLY)</b>
MOD	CT Chicago Metro	N/A	247310	
<ul style="list-style-type: none"> <li>Separated lookup code from Name contact field in Excel export</li> </ul>				

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<b>New/Updated Lookup Codes</b>				
<b>NEW/MOD</b>	<b>REQUESTED BY</b>	<b>FOOTPRINTS No(s).</b>	<b>TFS No(s).</b>	<b>FILE NAME (NEW ITEMS ONLY)</b>
MOD	CT Chicago Metro	N/A	241126	
<ul style="list-style-type: none"> <li>Added checkbox after Include closed/canceled orders for "Format for Excel export"; default unchecked</li> </ul>				

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<b>Opened/Closed Orders by Selection</b>				
<b>NEW/MOD</b>	<b>REQUESTED BY</b>	<b>FOOTPRINTS No(s).</b>	<b>TFS No(s).</b>	<b>FILE NAME (NEW ITEMS ONLY)</b>
MOD	CT Chicago Metro	N/A	241122,235036	
<ul style="list-style-type: none"> <li>Added dropdown after Commercial/Residential filter for "In/Out of County filter"; options are "In County Only"; "Out of County Only"; "In and Out of County" (default)</li> <li>Updated report header and results per selection</li> <li>Added option to Group by for "Other Contact (select type below)"</li> <li>Added drop down for "Other contact-contact type group by" below "Group By", to select which "Other Contact" type to group by</li> <li>Corrected issue where Report Total row is not fully showing amounts over \$1 million</li> </ul>				

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<b>Order Count-Revenue Summary</b>				
<b>NEW/MOD</b>	<b>REQUESTED BY</b>	<b>FOOTPRINTS No(s).</b>	<b>TFS No(s).</b>	<b>FILE NAME (NEW ITEMS ONLY)</b>
MOD	CT Los Angeles	N/A	234777	
<ul style="list-style-type: none"> <li>Added options to Group 1 and 2 for "Commercial/Residential"</li> </ul>				

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<b>Overdraft Report</b>				
<b>NEW/MOD</b>	<b>REQUESTED BY</b>	<b>FOOTPRINTS No(s).</b>	<b>TFS No(s).</b>	<b>FILE NAME (NEW ITEMS ONLY)</b>
MOD	CT Chicago Metro	N/A	241109	
<ul style="list-style-type: none"> <li>Added "Group by" options for: "Settlement Agent, Escrow Officer/Closer" and "Escrow Officer/Closer"</li> <li>Updated existing "Group by" option from "Trust Account, Branch, Closer" to "Trust Account, Branch, Escrow Officer/Closer"</li> </ul>				

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<b>Policy Production</b>				
<b>NEW/MOD</b>	<b>REQUESTED BY</b>	<b>FOOTPRINTS No(s).</b>	<b>TFS No(s).</b>	<b>FILE NAME (NEW ITEMS ONLY)</b>
MOD	CT Chicago Metro	N/A	241124	
<ul style="list-style-type: none"> <li>Added option to "Group details by" for Settlement Agent</li> <li>Added dropdown &amp; picklist for Settlement Agent flash code/list of Settlement Agents (same as was added to the Trust Accounting reports)</li> </ul>				

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<b>Single Ledger Balance</b>				
<b>NEW/MOD</b>	<b>REQUESTED BY</b>	<b>FOOTPRINTS No(s).</b>	<b>TFS No(s).</b>	<b>FILE NAME (NEW ITEMS ONLY)</b>
MOD	HOU	N/A	246939	
<ul style="list-style-type: none"> <li>Added a check box parameter "Include zero balance adjustments" default unchecked after "Include pending transactions"</li> </ul>				

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<b>Title Production Report</b>				
<b>NEW/MOD</b>	<b>REQUESTED BY</b>	<b>FOOTPRINTS No(s).</b>	<b>TFS No(s).</b>	<b>FILE NAME (NEW ITEMS ONLY)</b>
MOD	FT EPU, WA	N/A	246773	
<ul style="list-style-type: none"> <li>Added "Task Contains 'Commitment Delivered'" to the turn-time stop dropdown when state= IL</li> <li>Added Branch Flash Code picklist</li> </ul>				

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<b>Transaction Activity</b>				
<b>NEW/MOD</b>	<b>REQUESTED BY</b>	<b>FOOTPRINTS No(s).</b>	<b>TFS No(s).</b>	<b>FILE NAME (NEW ITEMS ONLY)</b>
MOD	CT Chicago Metro	N/A	241129	
<ul style="list-style-type: none"> <li>Changed "Group by branch then closer" checkbox to a dropdown</li> <li>Labeled as "Group by"; options are: "None" (default); "Branch, Escrow Officer/Closer"; "Settlement Agent, Escrow Officer/Closer", "Escrow Officer/Closer"</li> </ul>				

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<b>**Performance Improvements**</b>				
<b>NEW/MOD</b>	<b>REQUESTED BY</b>	<b>FOOTPRINTS No(s).</b>	<b>TFS No(s).</b>	<b>FILE NAME (NEW ITEMS ONLY)</b>
MOD	SoftPro	N/A	245799, 244930, 244924, 245840	
<ul style="list-style-type: none"> <li>Performance improvements made to the following reports, so they will render more quickly               <ul style="list-style-type: none"> <li>➢ Escrow Trial Balance</li> <li>➢ Fee Ticket –Batch</li> <li>➢ Orders Not Submitted</li> <li>➢ Title Production</li> </ul> </li> </ul>				

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# MARCH RELEASE NOTES

## CALIFORNIA

### DOCUMENTS

#### Escrow

#### Bulk - Notice to Creditors of Bulk Sale - NOCAL ONLY

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	FNT Shasta / Humbolt / Lassen / Butte	N/A	247896	

Modified so that Buyer signs if transaction is in Shasta/Humbolt/Butte/Lassen (EO lookup code contains SHA).

So far as known to the Buyer(s), all business names and addresses used by the Seller(s) for the three (3) years last past, if different from the above, are:

NONE

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

\_\_\_\_\_  
Brian T. Buyer

\_\_\_\_\_  
Date

\_\_\_\_\_  
Barbara T. Buyer

\_\_\_\_\_  
Date



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#### Deeds, Subordinations, etc

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	CT San Diego	N/A	244070	

This change applies to Southern California only. Coding changes were made so that the T2 reference number will appear on documents for Southern California (such as deeds, subordinations, etc) as requested.

#### RECORDING REQUESTED BY:

Fidelity

Order No.: 123456

Title No.: 123456

#### When Recorded Mail Document To:

Sam Buyer  
123456 Main Street  
Santa Barbara, CA 93101

The T2 reference number appears on the applicable documents for Southern California as requested.



SPACE ABOVE THIS LINE FOR RECORDER'S USE

**CONSENT TO EASEMENT**

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# MARCH RELEASE NOTES

- Demand - AITD
- Demand - Institutional
- Demand - Institutional w/ Authorization
- Demand - Lien for Spousal/Child Support
- Demand - Private
- Demand for Lien
- Demand for Lien - Private Party
- Demand for Release of Lien EDD
- Demand for Release of Lien FTB
- Demand Private with Request for Full Reconveyance

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	SoCal	N/A	242794	

Added "We are scheduled to pay off this lien on: (Settlement Date)" to the end of "An escrow has been opened..." paragraph. If there is not a Settlement Date in the order, then sentence will not print.

We are processing an escrow covering the above referenced property and loan number, more particularly described as:

SEE EXHIBIT "A" ATTACHED HERETO AND MADE A PART HEREOF

This loan is to be paid in full through this escrow. Please forward your demand for payment in full. **WE ARE SCHEDULED TO PAY OFF THIS LOAN ON: APRIL 30, 2015.**

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# MARCH RELEASE NOTES

## El Authorization to Pay Bills

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	CT SD	N/A	245647	

Revised to no longer prompt to select the number of bills which have data to fill out the information. Instead the document will pull the information from the HUD 1300's where the Payee is either Other (Credit Card) or Other (Misc. Payoff):

<input type="checkbox"/>	Other (Misc. Payoff)	Toyota Financial Services	02
<input type="checkbox"/>	Other (Credit Card)	Capital One	03

Line	Description	Re	Disclosure	Borrower	Seller	HUD-1 To Code	HUD-1 To Name
1301	Required services that you can s...						
1302	Capital One			1,300.00		03	Capital One
1303	Toyota			12,000.00		02	Toyota Financial Services

The address and Acct. No. pull from the Contact's information

Pay the following bills as shown below and mail them as indicated:

Payee:	Capital One	Acct. No.:	5555
Address:	1 Credit Card Lane, City, CA 11111	Amount:	\$ 1,300.00
Payee:	Toyota Financial Services	Acct. No.:	780497
Address:	450 Main Street, City, CA 98411-2288	Amount:	\$ 12,000.00

**NOTICE:** It is understood that Escrow Holder will be unable to close the transaction and remit the payments requested without the account numbers for the payments to be applied.

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# MARCH RELEASE NOTES

## EI CALFIRPTA Withholding Instructions

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	CT Tulare	N/A	245466	

Revised to add Property Address:

Jennifer McLaughlin, ISG  
 Chicago Title Company  
 1700 Stanford Ave., Suite 110  
 Modesto, WI 95350  
 Phone: (209)571-6300 Fax: (209)569-7255

Date: March 3, 2015  
 Escrow No.: 2011120240-JM-JM  
 Property: 1 Property Address  
 Atwood, CA 92811-1200

Pursuant to Section 18662 of the California Revenue and Taxation Code, Escrow Holder is hereby authorized and instructed as follows:

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## EI Escrow Instructions (Express)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	FNT San Luis Obispo	N/A	248762	

Revised to include the Escrow Acceptance signature block on the first page, as approved by Settlement:

These Escrow Instructions shall be effective upon signature by all parties, delivery of the fully signed agreement and acceptance by Escrow Holder. Escrow Holder does not provide legal or tax advice and has made no investigation or representations regarding the legal aspects of this transaction or compliance with state or federal laws regarding taxes, securities or any other matters. The parties should seek counsel for such matters from independent legal counsel and/or accounting or tax professionals.

Accepted by **Chicago Title Company**:

By: \_\_\_\_\_ Escrow No.: 2011120240-JM-JM

Date: \_\_\_\_\_ Escrow Officer: Jennifer McLaughlin

**Chicago Title Company** conducts escrow business under a Certificate of Authority No. 350 issued by the California Department of Insurance.

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# MARCH RELEASE NOTES

## Important Buyer Information

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	NoCal	N/A	247848	

Updated paragraphs 1 and 2

1. VESTING OF TITLE: The manner in which title to real property is held may have important estate planning and tax consequences; therefore, serious consideration should be given to this decision. Joint tenancy, community property (available only to **married couples**), and tenancy in common are ways in which title to real property is frequently held by individuals. Any questions or concerns as to the best way for you to hold title should be directed to your attorney or accountant. Please provide this information to your escrow officer when it has been determined.
2. PRELIMINARY CHANGE OF OWNERSHIP: (Required when any change of ownership occurs) Section 480 of the Revenue and Taxation Code of the State of California requires that a buyer of real property complete a Preliminary Change of Ownership statement, which is to be filed at the time that a grant deed is recorded. This form will be provided to you during the course of your escrow. In the event that the statement is not completed and presented at the time of the recording of the deed, the recorder will assess the buyer an additional Twenty and No/100 Dollars (\$20.00) to record the deed. **The failure to file a change in ownership statement within ninety (90) days from the date a written request is mailed by the assessor results in a penalty of either: (1) One Hundred and No/100 Dollars (\$100.00), or (2) Ten Percent (10%) of the taxes applicable to the new base year value reflecting the change in ownership of the real property or manufactured home, whichever is greater, but not to exceed Five Thousand and No/100 Dollars (\$5,000.00) if the property is eligible for homeowner's exemption or Twenty Thousand and No/100 Dollars (\$20,000.00) if the property is not eligible for the homeowner's exemption if that failure to file was not willful.**

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## Memorandum of Instructions to Pay Commission

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	Settlement	N/A	248902	

Modified to match Company-approved forms per Tech Memo 128-2010.

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# MARCH RELEASE NOTES

## MH Jr. Lienholder Demand MH Legal Owner Demand MH Legal Owner Demand w/ Approval

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	SoCal	N/A	242794	

Added "We are scheduled to pay off this lien on: (Settlement Date)" to the end of "An escrow has been opened..." paragraph. If there is not a Settlement Date in the order, then sentence will not print.

We are processing an escrow covering the above referenced property and loan number, more particularly described as:

SEE EXHIBIT "A" ATTACHED HERETO AND MADE A PART HEREOF

This loan is to be paid in full through this escrow. Please forward your demand for payment in full. **WE ARE SCHEDULED TO PAY OFF THIS LOAN ON: APRIL 30, 2015.**

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## Open Order Sheet - Outside Title Company - SOCAL ONLY

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	CT SD	N/A	253458	

Updated to include the Escrow Office name and the Escrow/Order No. on the top right. Also moved the second Title Company (T2) Reference No. to appear beside the Title Examiner's name on the top left of the document.

OPEN ORDER SHEET  
- OUTSIDE TITLE COMPANY

Changed placement of Escrow Office and Escrow/Order No. information as shown below. Also moved the second Title Company Reference No. (T2) to appear beside the Title Examiner's name.

Title Office:	<p>Title Company, LLC  <span style="background-color: yellow;">Sam Title (123456)</span>            Sam@titlecompany.com</p>	<p><span style="background-color: yellow;">Chicago Title Company</span>            Escrow/Order No:  <span style="background-color: yellow; font-size: 1.2em; font-weight: bold;">2015020300RBRefi</span></p>
Escrow Officer:	<p>Courtney Harty            courtney.harty@softpro.corp</p>	
Processor / Assistant:	<p>Carly Robidoux            carly.robidoux@softprocorp.com</p>	

**Please open new order as indicated below:**

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# MARCH RELEASE NOTES

## Separate Commission – Listing/Selling

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	Settlement	N/A	248902	

Modified to match Company-approved forms per Tech Memo 128-2010.

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# MARCH RELEASE NOTES

## Title

- CLTA 110.11.2-06 - Mortgage Modification with Additional Amount of Insurance
- CLTA 143-06 - Water - Buildings
- CLTA 143.1-06 - Water - Improvements
- CLTA 143.2-06 - Water - Described Improvements
- CLTA 143.3-06 - Water - Land Under Development
- CLTA 144-06 - Commercial Lender Group
- CLTA 145-06 - Anti-Taint
- CLTA 146-06 - Insured Mortgage Recording
- CLTA 147-06 - Tax Credit
- CLTA 147.1-06 - Tax Credit - Defined Amount

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
New	Underwriting	n/a	247697, 248832	Various E13C and E14C

Screenshot of One Example Only. Render in Test Site to See Full Version of Each.

**ENDORSEMENT - CLTA 144-06**      **COMMERCIAL LENDER GROUP**

Attached to Policy Number:

PolNum-789

Issued By:

CHICAGO TITLE INSURANCE COMPANY

Charge: \$250.00

1. The insurance provided by this endorsement is
  - a. subject to the Exclusions from Coverage, the Exceptions from Coverage contained in Schedule B, and the Conditions in the policy, and
  - b. only effective if the Land is not improved with a one-to-four family residential dwelling.
2. For the purposes of this endorsement only:
  - a. "Lender Group" means a group of lenders owning portions of the Indebtedness. The composition of the Lender Group may change by the addition or withdrawal of Participants during the term of the Insured Mortgage.
  - b. "Participant" means a member of the Lender Group, but does not include a non-insured obligor as described in Section 12(c) of the Conditions. A Participant is an Insured under the policy to the extent of its ownership of a portion of the Indebtedness, whether it acquires its portion of the Indebtedness on or after Date of Policy.
3. The Company insures against loss or damage sustained by the Insured by reason of:
  - a. The invalidity or unenforceability of the lien of the Insured Mortgage caused by transfers after the Date of Policy of portions of the Indebtedness by the Participants.
  - b. Loss of priority of the lien of the Insured Mortgage, which loss of priority is caused by transfers after the Date of Policy of portions of the Indebtedness by the Participants.
4. The Company reserves all rights and defenses as to any Participant that the Company would have had against any other Insured under the policy, unless the Participant acquired its portion of the Indebtedness as a purchaser for value without Knowledge of the asserted defect, lien, encumbrance, or other matter insured against by this policy.

This endorsement is issued as part of the policy. Except as it expressly states, it does not (i) modify any of the terms and provisions of the policy, (ii) modify any prior endorsements, (iii) extend the Date of Policy, or (iv) increase the Amount of Insurance. To the extent a provision of the policy or a previous endorsement is inconsistent with an express provision of this endorsement, this endorsement controls. Otherwise, this endorsement is subject to all of the terms and provisions of the policy and of any prior endorsements.

**Chicago Title Insurance Company**

Dated: October 19, 2014

Countersigned By:

AUTHORIZED  
SIGNATURE HERE

---

Authorized Officer or Agent

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CLTA 144-06-Commercial Lender Group      (10/2014)

CLTA 144-06-Commercial Lender Group      (10/2014)

Formal: 2017.12.05 10:04 AM

CA-PH0001190100004-0000-01-14021000010-00 000000

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# MARCH RELEASE NOTES

## Lender's Supplemental

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	CPF Fresno	n/a	248827	

The Lender's Supplemental report has been updated with an additional prompt to enable the user to specify an endorsement, as well as the type of property (a single family dwelling, etc.) if "company not aware of items" is selected in the drop-down.

The screenshots illustrate the following updates to the Lender's Supplemental report:

- Top Screenshot:** Shows the report header with the title "Lender's Supplemental" and "Escrow Company: The Escrow Company". Below this, it displays the order information: "Order: 2010090010-CP test CA, Purchase, settlement date 3/20/2015, received on 2/20/2015". A prompt asks to "Select whether company is aware of:" followed by a dropdown menu. The dropdown options are: "company not aware of items" (highlighted in red), "company not aware of items", "conveyance affecting land", and "no items shown".
- Middle Screenshot:** Shows the report content area. It includes the text "Loan Policy: Loan policy, LoanPolNum-456, 400000.00" and a prompt: "Enter name of endorsement (e.g., 'CLTA Endorsement Form 116-06', etc.)". Below this is a text input field with a red prompt: "fill in endorsement name".
- Bottom Screenshot:** Shows the report content area with the same loan policy information. The prompt is updated to: "Enter the type of property (e.g., 'a single family residence', etc.)". Below this is a text input field with a red prompt: "fill in type of property".

The above numbered report (including any supplements or amendments thereto) is hereby modified and/or supplemented to reflect the following additional items relating to the issuance of a Loan Policy.

The Company is not aware of any matters which would cause it to decline to attach **fill in endorsement name** to ALTA Loan Policy 2006 indicating that there is located on said land **fill in type of property** known as 12345 Property Street, San Jose, CA 95111.

The document has also been updated with a fill in to enable the user to specify an endorsement if "no items shown" is selected in the drop-down.

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# MARCH RELEASE NOTES

**DO NOT USE - ALTA Residential Limited Coverage Junior Loan Policy 1996**  
**DO NOT USE - ALTA Short Form Residential Limited Coverage Junior Loan Policy 1996**  
**DO NOT USE - ALTA Short Form Residential Loan Policy 2007**  
**DO NOT USE - Short Form Residential Loan Policy 2006**  
**DO NOT USE - ALTA U.S. Policy**

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	Underwriting	n/a	248912	

As directed by Corporate Counsel, the outdated policy forms listed above should no longer be issued.

These obsolete policies have been marked as DO NOT USE in the Loan and Owner's Policy lookup tables (and have been sorted lower along with the existing older policies already marked as DO NOT USE):

Sort	PolicyLookupCode	Version
70	P92A_L_LoanPol	DO NOT USE - ALTA Loan Policy 1992
71	P06A_L_SFLoanP	DO NOT USE - ALTA Short Form Residential Loan Policy 2006
72	P70A_L_LoanEnd	DO NOT USE - ALTA Loan Policy with Endorsement Form 1 Coverage 1970
73	P92A_L_LeaseLn	DO NOT USE - ALTA Leasehold Loan Policy with Endorsement Form 1 Coverage 1992
74	P92A_L_LoanEnd	DO NOT USE - ALTA Loan Policy with Endorsement Form 1 Coverage 1992
75	P00A_L_SFLoanP	DO NOT USE - ALTA Short Form Residential Loan Policy 2000
76	P70A_L_LoanPol	DO NOT USE - ALTA Standard Loan Policy 1970
77	P96A_L_LmtJrLn	<b>DO NOT USE</b> - ALTA Residential Limited Coverage Junior Loan Policy 1996
78	P96A_L_SFLmtJr	<b>DO NOT USE</b> - ALTA Short Form Residential Limited Coverage Junior Loan Policy 1996
79	P07A_L_SFLoanP	<b>DO NOT USE</b> - ALTA Short Form Residential Loan Policy 2007
80	P06S_L_SFLoanP	<b>DO NOT USE</b> - Short Form Residential Loan Policy 2006

Sort	PolicyLookupCode	Version	BillCode	D-ReadyBloc C
01	P13A_O_HomeOwn	ALTA Homeowner's Policy of Title Insurance 2013	TP	P13A_O_HomeO
02	P14C_StanCov	CLTA Standard Coverage Policy 1990 (04-08-14)	TP	P14C_StanCov
03	P06A_O_OwnersP	ALTA Owner's Policy 2006	TP	P06A_O_Owner
04	P12A_O_USPolic	ALTA U.S. Policy 2012	TP	P12A_O_USPoli
05	B0AC_L_InteBin	CLTA Interim Binder	TP	B0AC_L_InteBir
07	P92A_O_OwnersP	DO NOT USE - ALTA Owner's Policy 1992	TP	P92A_O_Owner
08	P92A_O_LeaseOwn	DO NOT USE - ALTA Leasehold Owner's Policy 1992	TP	P92A_O_Lease
09	P91A_O_USPolic	<b>DO NOT USE</b> - ALTA U.S. Policy	TP	P91A_O_USPoli
10	P70A_O_OwnersP	DO NOT USE - ALTA Owner's Policy 1970	TP	P70A_O_Owner

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# MARCH RELEASE NOTES

## REPORTS

<b>EPU Task Summary/Productivity by County Manager</b>				
<b>NEW/MOD</b>	<b>REQUESTED BY</b>	<b>FOOTPRINTS No(s).</b>	<b>TFS No(s).</b>	<b>FILE NAME (NEW ITEMS ONLY)</b>
MOD	Division II NoCal EPU		246775	
<ul style="list-style-type: none"><li>• Added "PreDraw" task before "Draw"</li><li>• Did not separate purchase/refinance</li><li>• Did not adjust averages for EPU Utilization report</li></ul>				

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# MARCH RELEASE NOTES

## ILLINOIS

### DOCUMENTS

#### Escrow

#### Appointment Sheet

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	CT Metro	n/a	253797	

Updated the document with several new custom fields and removed the Escrow Brief Legal Description.

**APPOINTMENT SHEET**

Updated custom field to pull in name of individual who schedules the closing.

Order No.: 2014002398	Taken By: [Redacted]
Date of Closing: April 30, 2015	Date Scheduled: March 17, 2015
Time of Closing: 12:00 AM	Closer: Courtney Harty
Scheduled By: Sam Requestor	Phone: 7489
Order Type: Title & Escrow	Purchase Price: \$280,000.00

**APPOINTMENT SHEET**  
(continued)

**LENDER:**

Savings Bank 1234 Savings Street Albany, CA 94706 Phone: 888-123-4567      Fax: 887-123-4568 Email: bank@savings.com Loan No.: 0132456 Loan Amount.: \$225,000.00 Reference No.: 123456 Loan approved: March 17, 2015 Commitment Expires: March 20, 2015 Confirmed: _____ Date Confirmed: _____	<b>Contact: Larry Lender</b> 1234 Savings Street Albany, CA 94706 Phone: 888-123-4567      Fax: 888-123-1547 Cell: 887-123-4569 Email: larry@savingsbank.com
--	---

Replaced the custom fields in this section with blank lines.

**PROPERTY(IES):**

**1234 Main Street, Albany, IL 94707**

APN/Parcel ID(s): 123456	County: Cook
Tax/Map ID(s): 123456	Subj: [Redacted]
[Redacted]	Pr: [Redacted]
[Redacted]	Pr: [Redacted]

Comments: Closing Notes  
1234 Main Street Chicago, IL 60479

Removed the Escrow Brief Legal Description.

Removed the General Comments custom field and replaced it with two separate custom fields. One for Closing Notes, and the other for the Offsite Address.

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# MARCH RELEASE NOTES

## Exam Summary (North or Commercial)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	Commercial	n/a	253785	

This change only affects those operations that have a Cost Center Code FA83. For those operations, the title in the header and footer will read Exam Summary (Commercial) instead of Exam Summary (North). The verbiage regarding where to return the completed and signed Examination Summary was removed at the end of the document.

The undersigned hereby directs the typing of title insurance commitments in accordance with the above instructions.

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

**AGENT:**

\_\_\_\_\_  
Print Company Name

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

By: \_\_\_\_\_  
Print Name

Its: \_\_\_\_\_  
Print Title

For operations with Cost Center Code of "FA83", this statement is omitted.

Return completed and signed Examination Summary to (630)282-7315 or email to [nwexams@ctt.com](mailto:nwexams@ctt.com).

footer name will be "Exam Summary (Commercial)"

Exam Summary (North)  
ILD0354.doc / Updated: 03.18.15

Page 5

Printed: 03.18.15 @ 10:06 AM by MS  
IL-CT-FSWM-01080.225403-15ST00415SK

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## Initial Fee Quote

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	CT Metro		247618	

- Lender name will pull from the company name from the "L" contact (if any)
- Loan number will pull from the reference number from the "L" Lender contact (if any); if no Reference Number then use Loan 1 Number
- Added free-text field for "Owners Policy Seller Pay %" - default to 100.00 (might include decimal)
- Removed logic for 209/509

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# MARCH RELEASE NOTES

## Later Date Transmittal (Metro)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
New	CT Metro	n/a	253793	ILD0445.doc

New document. Render to view complete document.

LATER DATE TRANSMITTAL	
<b>Date:</b>	March 17, 2015
<b>To:</b>	Title Company, LLC
<b>Guarantee No.:</b>	123456
<b>Closer:</b>	Courtney Harty
<b>Escrow No.:</b>	2014080299RBCH
<b>Phone No.:</b>	7489
DO NOT CORRESPOND WITH THE TITLE APPLICANT; ALL QUESTIONS ARE TO BE DIRECTED TO THE CLOSER	
PLEASE PRINT OR TYPE INSTRUCTIONS	

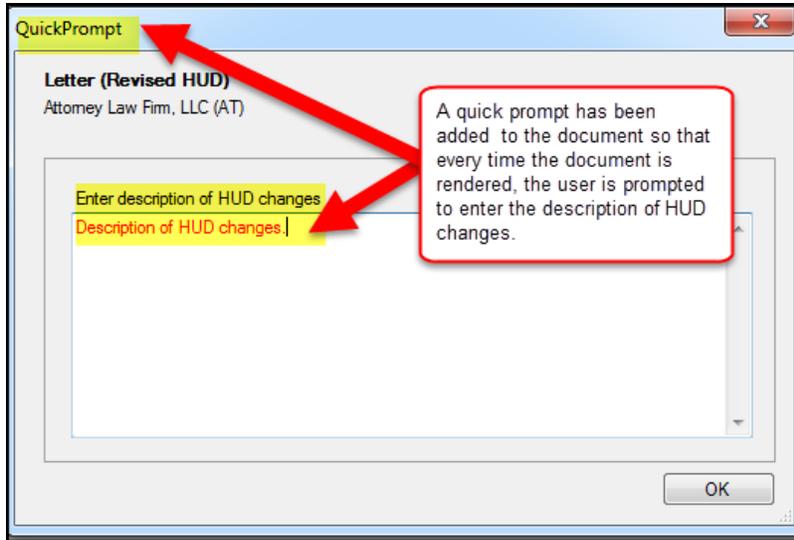
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# MARCH RELEASE NOTES

## Letter (Revised HUD)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	FT RLC	n/a	249562	

Updated the prompt for description of HUD changes in the document to be a quick prompt so that every time the document is rendered, the user is prompted.



To Our Valued Customer:

Enclosed, please find a revised HUD-1 for the above after the closing date. Please keep this copy for your records.

Thank you for choosing [Escrow Office](#)

Description of HUD changes.

The description entered in the quick prompt is stated on the document as shown here.

required to be made

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# MARCH RELEASE NOTES

## Personal Undertaking (Gap)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	CT Metro	n/a	248512	

Modified to now allow both Buyer and Seller signatures on the document.

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

### BORROWER(S):

\_\_\_\_\_  
Brian T. Buyer

\_\_\_\_\_  
Date

\_\_\_\_\_  
Brenda T. Buyer

\_\_\_\_\_  
Date

### SELLER(S):

\_\_\_\_\_  
Samuel T. Seller

\_\_\_\_\_  
Date

\_\_\_\_\_  
Samantha T. Seller

\_\_\_\_\_  
Date

\_\_\_\_\_  
Print Company Name

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

By: \_\_\_\_\_  
Print Name

Its: \_\_\_\_\_  
Print Title

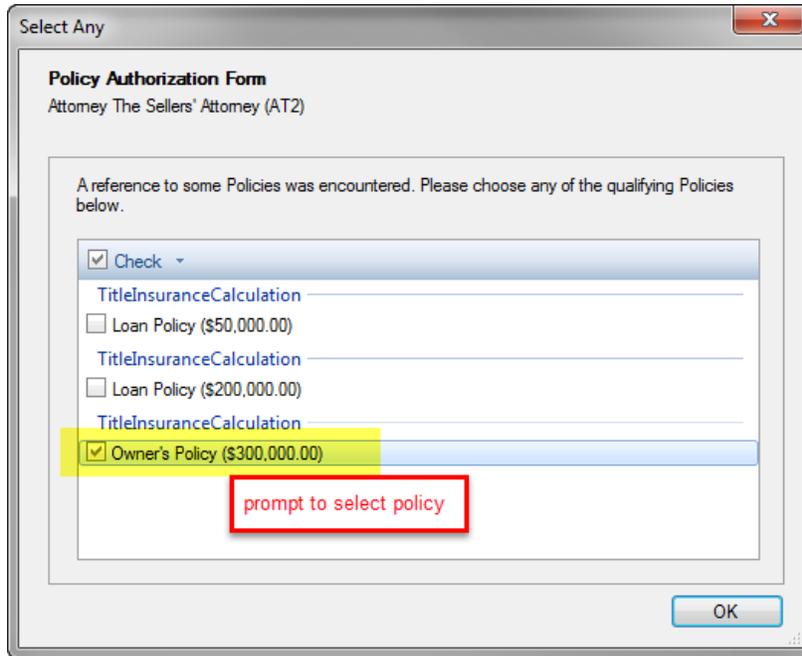
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# MARCH RELEASE NOTES

## Policy Authorization Form

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	CT Metro	n/a	249556	

Modified so that users can now choose between policies and if none are chosen, a blank line will print.



Select Any

**Policy Authorization Form**  
Attorney The Sellers' Attorney (AT2)

A reference to some Policies was encountered. Please choose any of the qualifying Policies below.

Check ▾

TitleInsuranceCalculation

Loan Policy (\$50,000.00)

TitleInsuranceCalculation

Loan Policy (\$200,000.00)

TitleInsuranceCalculation

Owner's Policy (\$300,000.00)

prompt to select policy

OK

You are hereby authorized to issue our commitment/policy under your number:

- Vacant
- Commercial
- Over-the-Limit

if no policy is selected, a blank line prints

In the amount of \_\_\_\_\_

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# MARCH RELEASE NOTES

## Recording Reconciliation Form

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	FT RLC	n/a	248366	

Replaced custom fields with new custom fields. Rather than checkboxes, users can now insert the number of each document type to be recorded.

Screen:

⏪ ⏩
Document Recordings

Enter number of deeds to be recorded:

Enter number of Quit Claim deeds to be recorded:

Enter number of mortgages to be recorded:

Enter number of assignments to be recorded:

Enter number of releases to be recorded:

Enter number of subordinations to be recorded:

Enter number of POAs to be recorded:

Enter number of Affidavits/Cert. to be recorded:

Enter number of additional docs to be recorded:

Select if Releases are to be recorded post closing

Document:

**CHECK DOCUMENTS TO BE RECORDED AT CLOSING:**

- 1      Deed(s)
- 2      Quit Claim Deed(s)
- 3      Mortgage(s)
- 4      Assignment(s)
- 5      Release(s)
- 6      Subordination(s)
- 7      Power of Attorney(s)
- 8      Affidavit(s)/Certificate(s)
- 9      Additional Doc(s)

Check off for any Releases to be Recorded Post Closing  
*\*Refund will be issued if not checked\**

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# MARCH RELEASE NOTES

## Split Sheet

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	CT Metro		247614	

### Owner's Policy and Loan Policy Splits

- Pulling from custom fields. (Screen shot sample attached)
  - The amount due to CTIC will be logic built into the report
- 2<sup>nd</sup> Loan Policies**
- No Splits are calculated at this time for the Agent. 100% gets paid to CTIC
  - Loan Policy Amount – Order.NatlRateFNF\_Loan2Liability\_FNFIL#
  - Loan Premium Amount – Order.NatlRateFNF\_Loan2Prem\_FNFIL#
- Endorsements**
- Using the current logic of hitting the Contracts Commission Report – CT Metro Lookup table
  - Additional Title Charges
  - Using the current logic

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## Title Indemnity Agreement (Metro)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	CT Metro	n/a	249572	

Changed title of document from Title Indemnity Agreement (FNT) to Title Indemnity Agreement (Metro).

The screenshot shows a document title 'Title Indemnity Agreement (Metro)' highlighted in yellow. A red arrow points from a red-bordered box containing the text 'Changed title of the document from Title Indemnity Agreement (FNT) to Title Indemnity Agreement (Metro).' to the new title. In the top right corner of the screenshot, there is a timestamp: 'Printed: 03-17-15 @ 09:26 AM by 2014080299RB'.

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# MARCH RELEASE NOTES

## Tract Search Report

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	FT Metro	n/a	249551	

Modified document to print both Requirements and Exceptions.

**4. WE FIND THE FOLLOWING RECORDED DOCUMENTS AND ADVERSE MATTERS:**

- Any facts, rights, interests, or claims that are not shown by the Public Records but that could be ascertained by an inspection of the Land or that may be asserted by persons in possession of the Land.
- Any lien or right to a lien for services, labor or material not shown by the Public Records.
- An assignment which purports to transfer the beneficial interest in the Land, and in any interest therein, thereof, the named assignor was not the record holder of the beneficial interest.  
  
Recording Date: November 14, 2014  
Recording No.: 123456
- It appears of record that one of the beneficiaries of said deed of trust is now deceased. The interest of the beneficiary named below should be terminated in the public records.  
  
Beneficiary:
- Any right or interest that others may have or claim in any of the fixtures or other equipment associated with the automobile service station located on the Land, including but not limited to any auto body service equipment or underground storage equipment.
- Any encroachment, encumbrance, violation, variation or adverse circumstance affecting the Title that would be disclosed by an accurate and complete land survey of the land and not shown by the Public Records.

**5. NAMES:**

Updated this section so that both Requirements and Exceptions listed in the Order will print.

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# MARCH RELEASE NOTES

## Wire Information

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	FT Metro	n/a	253774	

Modified document so that when the Escrow Office location is IL, new verbiage relating to the funds appears.

### For Reference Purposes:

**Seller(s):** Builder, LLC  
Sam Seller  
**Property:** 1234 Main Street  
Albany, IL 94707

New verbiage appears relating to wire transfer of funds when the Escrow Office is in IL.

**Funds \$50,000.00 and over must be in the form of a Wire Transfer.**

Please take this form with you to your bank.

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# MARCH RELEASE NOTES

## REPORTS

Initial Fee Quote				
NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
MOD	CT Chicago Metro		247618	
<ul style="list-style-type: none"> <li>Lender name will pull from the company name from the "L" contact (if any)</li> <li>Loan number will pull from the reference number from the "L" Lender contact (if any); if no Reference Number then use Loan 1 Number</li> <li>Added free-text field for "Owners Policy Seller Pay %" - default to 100.00 (might include decimal)</li> <li>Removed logic for 209/509</li> </ul>				

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Order Export				
NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
MOD	CT Chicago Metro		241253	
<ul style="list-style-type: none"> <li>Removed the "Include only Mkt Sources with a Rep" checkbox and all associated functionality</li> <li>Added report type for "Revenue-Details"; include same columns as the existing Revenue format, but do not group by Marketing Source; also, add column for Order Number</li> <li>On the Opened, Closed and Revenue-Details report types, added columns after Order Number for "Product Type" (display the product type description) and "Order Received By" (display full employee name)</li> <li>Added column after Marketing Source Address for Marketing Source Type (display contact type; e.g., lender, attorney, etc.)</li> </ul>				

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Split Sheet				
NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
MOD	CT Chicago Metro		247614	
<p><b>Owner's Policy and Loan Policy Splits</b></p> <ul style="list-style-type: none"> <li>Pulling from custom fields. (Screen shot sample attached)</li> <li>The amount due to CTIC will be logic built into the report</li> </ul> <p><b>2<sup>nd</sup> Loan Policies</b></p> <ul style="list-style-type: none"> <li>No Splits are calculated at this time for the Agent. 100% gets paid to CTIC</li> <li>Loan Policy Amount – Order.NatlRateFNF_Loan2Liability_FNFIL#</li> <li>Loan Premium Amount – Order.NatlRateFNF_Loan2Prem_FNFIL#</li> </ul> <p><b>Endorsements</b></p> <ul style="list-style-type: none"> <li>Using the current logic of hitting the Contracts Commission Report – CT Metro Lookup table</li> <li>Additional Title Charges</li> <li>Using the current logic</li> </ul>				

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# MARCH RELEASE NOTES

## MYSCREENS

### Document Recordings

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	FT RLC	n/a	248370	

Replaced custom fields with new custom fields. See Documents Project 248366.

◀ ▶

### Document Recordings

Enter number of deeds to be recorded:

Enter number of Quit Claim deeds to be recorded:

Enter number of mortgages to be recorded:

Enter number of assignments to be recorded:

Enter number of releases to be recorded:

Enter number of subordinations to be recorded:

Enter number of POAs to be recorded:

Enter number of Affidavits/Cert. to be recorded:

Enter number of additional docs to be recorded:

Select if Releases are to be recorded post closing

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# MARCH RELEASE NOTES

## NORTH CAROLINA

### DOCUMENTS

#### Escrow

- Funds Acknowledgment Letter - All Options
- Funds Acknowledgment Letter - Standard - Initial Funds
- Promissory Note Acknowledgement Letter

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	CTNC	N/A	253502	

Updated the Conditions of Escrow section to state \$250,000 instead of \$100,000 under Item 2.

- The Funds may be processed for collection in the normal course of business by Escrow Agent, who may commingle funds received by it with escrow funds of others in the regular escrow account at Wells Fargo Bank, or such other institution as maintained from time to time by Escrow Agent (hereinafter the "Depository"). The parties to this escrow agreement acknowledge that the use of such escrow accounts with some Depository institutions may result in the commingling of funds with other funds of such escrow accounts with some Depository institutions, which may result in the loss of an array of bank services, accommodations or other benefits by the parties to the escrow agreement. Its affiliates also may elect to enter into other business transactions with the Depository institution for other purposes from the Depository institution. All such services, accommodations and benefits shall be due to Escrow Agent, and Escrow Agent shall have no obligation to account to the parties to the escrow for the value of such services, accommodations or other benefits.
- Escrow Agent shall not be liable for any loss caused by the failure, suspension, inability to pay funds or accrued interest, bankruptcy or dissolution of the Depository. Parties to the Agreement acknowledge their familiarity with limitations on payments made on accounts in excess of \$250,000 and the cumulative effect of other accounts held or owned by the parties in the above named depository.

Amount changed from \$100,000 to \$250,000 in Item 2 of the Conditions of Escrow section.

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# MARCH RELEASE NOTES

## OREGON

### DOCUMENTS

#### Escrow

#### Letter (Line of Credit Authorization)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	FNT Portland	N/A	247283	

Added prompt to ask if Reconveyance will be sent to the Settlement Agent. If not checked, another prompt will offer the user a place to enter an alternate address. If prompt is checked, the Settlement Agent address will print.

Field Prompt

**Letter (Line of Credit Authorization)**  
Payoff Lender Payoff Lender Company (P)

Payoff Lender Payoff Lender Company (P)

Check if reconveyance will be sent to settlement agent

Field Prompt

**Letter (Line of Credit Authorization)**  
Payoff Lender Payoff Lender Company (P)

Payoff Lender Payoff Lender Company (P)

Enter the address where reconveyance should be sent

100 Main Street  
Portland, OR

Upon receipt of funds representing payment in full, you are to forward the full reconveyance to:

100 Main Street  
Portland, OR

Alternate address information is displayed on the document when prompt isn't checked.

If prompt had been checked:

Upon receipt of funds representing payment in full, you are to forward the full reconveyance to:

Escrow Office  
Courtney Harty, Documents Specialist  
101 Test Avenue  
Tulare, CA 93274

Settlement Agent address information is displayed if the prompt is checked.

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# MARCH RELEASE NOTES

## Letter (Misc. Payoff Demand)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	FNT Portland	n/a	249071	

Updated document to render with blank lines in the first paragraph.

I hand you herewith the following:

Items enclosed

You are hereby instructed to use the above document(s) and you hold  
 executing said document(s), the amount of \$ \_\_\_\_\_ plus interest on said balance at the rate of  
 \_\_\_\_\_ % per annum from \_\_\_\_\_ to date of close of escrow.

Blank lines render in the first paragraph of the document.

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## Letter (Payoff Enclosure)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	FNT Portland	n/a	248837	

Updated document to include outgoing wire information if applicable to the transaction.

Enclosed please find the following representing partial pay

Wire No. 12346 in the amount of \$25,000.00.

Terms enclosed

Wire information is pulled in when applicable.

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# MARCH RELEASE NOTES

## Multiple Documents

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	Internal Maint.	N/A	250418	

Modified titles (and footers) of following documents to remove the "/" and "&" symbols:

- Cover Page For High Liability and or Creditors' Rights Approval Request
- EI - Addition and or Amendment (EIS)
- EI Supplemental - Forest or Farm Use Land
- Letter (Demand Institutional with Approval)
- Letter (Demand Institutional without Approval)
- Letter (Fire Insurance and Lender Information Request Form)
- Letter (Payoff Request with Authorization)
- Letter (Preliminary Report - Inspection Approval)
- Promissory Note (All-Inclusive - Interest Included)
- Reinsurance Application Questionnaire
- Request (Full Reconveyance Indemnification of Lost Note and or Trust Deed)
- Request (Full Reconveyance without Extinguishment of Debt)
- Request (Full Reconveyance without Extinguishment of Debt and Appt. of Successor Trustee)
- Request (Full Reconveyance without Extinguishment of Debt Indemnification of Lost Trust Deed)
- Request (High Liability or Special Risk Approval)
- Special Power of Attorney (Buyer-Borrower)

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# MARCH RELEASE NOTES

## TEXAS

### DOCUMENTS

#### Escrow

##### Affidavit (Identity)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	AT Harris County	N/A	250067	

Updated so that "Texas" is no longer hard coded in the Affidavit under Item 2. Rather, the information is pulled in from the entry made in the Order on the Buyer/Borrower contact screen.

Affiant on oath swears that the following statements are true and within the personal knowledge of the Affiant:

- I am the Owner/Borrower of this affidavit. "Texas" is no longer hard coded in the document and renders with information completed in the Order on the Buyer/Borrower contact screen. and I am competent to execute
- My full name is John Smith. I reside at 1234 Buyer Way, in the City of Albany, Dallas County, Texas.

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##### Affidavit (T-47)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	FT Dallas	N/A	246343	

Changed Date from settlement date to current date.

Settlement date/time: 03/31/2015 01:00 AM

### T-47 RESIDENTIAL REAL PROPERTY AFFIDAVIT (May Be Modified as Appropriate for Commercial Transactions)

**Date:** March 3, 2015

**GF#:** ATCH-81F-ATCH15047668

**Name of Affiant(s):** Jose A San Miguel, III  
**Address of Affiant:** 46 Texian Trail, Angleton, TX 77515  
**Description of Property:** Lot(s): 22 Block: 1 Texian S/D  
 Brazoria County, Texas

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# MARCH RELEASE NOTES

## Commercial Flow Sheet

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	FNT Houston	N/A	248834	

This document was rolled back to its original version so that the flow sheet shows all individuals in the contact list. Render to view the complete document with all contacts listed.

COMMERCIAL FLOW SHEET	
<b>GF #:</b> 2014080299RB	
<b>Anticipated Closing Date:</b> April 30, 2015	
<b>Sales Price:</b> \$280,000.00	
<b>Property Address:</b> 1234 Main Street, Dallas, TX 75207 Dallas County	
<b>Purchaser:</b>	
John Smith and Mary Smith 1234 Buyer Way Albany 94706 Phone: 123-456-7890 Email: jsmith@gmail.com	

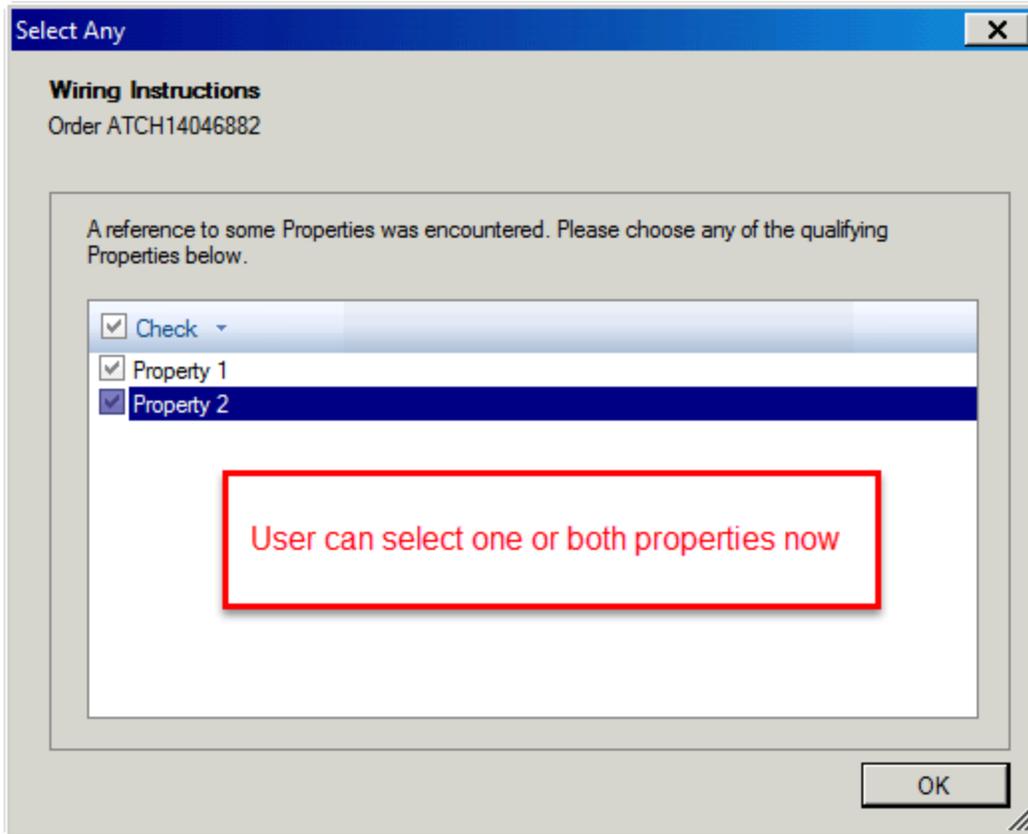
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# MARCH RELEASE NOTES

## Wiring Instructions

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	AT Austin	N/A	245575	

Changed current radio button prompt which allows user to select one property from a list to a multiple prompt which allows user to select all applicable properties.



Date: March 3, 2015 GF#: ATCH14046882 Property Address: 117 Lasso, Angleton, TX 77515 117-A Lasso, Angleton, TX 77515	<div style="border: 1px solid red; padding: 2px; display: inline-block;">all selected addresses now print</div>
--	---

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# MARCH RELEASE NOTES

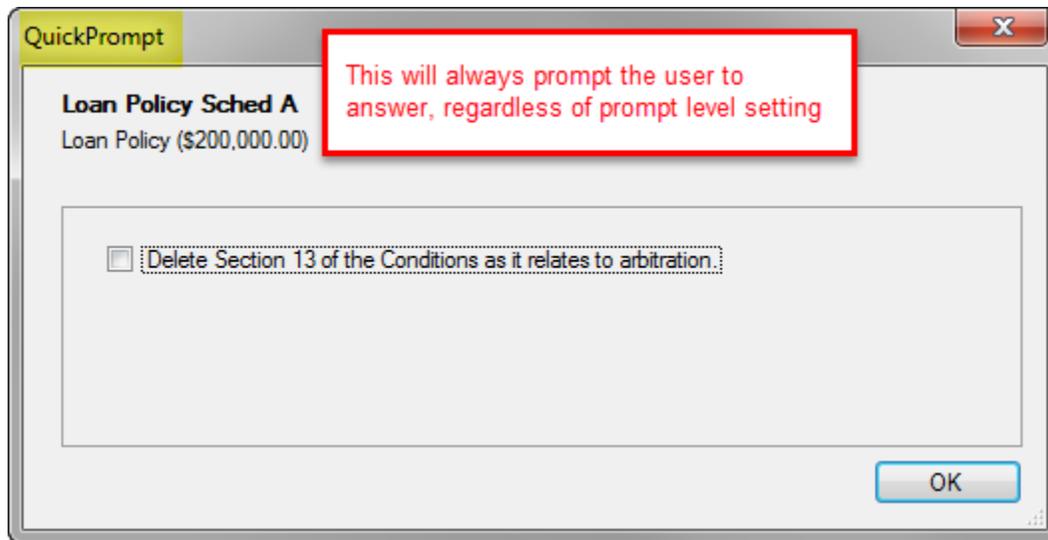
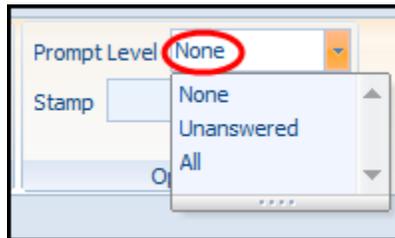
## Title

**Loan Policy of Title Insurance (T-2) - 2014**

**Texas Short Form Residential Loan Policy One-To-Four Family (T-2R) - 2014**

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	Houston CPF	N/A	250175	

Modified so that the Deletion of Arbitration checkbox is a quick prompt instead of a regular prompt. Regardless of the prompt level, the user will always get prompted to answer. For the Loan Policy of Title Insurance (T-2) - 2014, this is in addition to the Print Separate Vesting Exhibit prompt that was already set to be a quick prompt.



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# MARCH RELEASE NOTES

## WASHINGTON

### REPORTS

Order Exceptions				
NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
MOD	WA Renton		247716	
<ul style="list-style-type: none"><li>Do not show files as exceptions when "Title Only" is entered as the escrow officer.</li></ul>				

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# MARCH RELEASE NOTES

## WISCONSIN

### DOCUMENTS

#### Escrow

#### Affidavit (Construction Lien-Commercial)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	CT Wisconsin	N/A	249582	

Updated verbiage in Item 3 of document, "Tenants" section, to state the word "transaction" rather than "sale."

3. **Tenants.** The following tenants and renters occupy the Property. (Check One Box)

- There are **no** tenants.
- There are tenants, but all have left the Property or **will** leave as of \_\_\_\_\_.
- One or more tenants **will stay** after this **transaction** is closed. Their names are:  
\_\_\_\_\_  
\_\_\_\_\_

Verbiage in Item 3 now states "transaction" instead of "sale."

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# MARCH RELEASE NOTES

## SERVICELINK

### DOCUMENTS

#### Escrow

#### Agent Property Questionnaire

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	ServiceLink	N/A	250536	

Updated to include another area for HOA information. There are now two areas for HOA information on the document.

NAME OF HOA: \_\_\_\_\_

MANAGEMENT COMPANY: \_\_\_\_\_

PHONE NO.: \_\_\_\_\_

NAME OF HOA: \_\_\_\_\_

MANAGEMENT COMPANY: \_\_\_\_\_

PHONE NO.: \_\_\_\_\_

An additional area for HOA information is now included on the document.



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# MARCH RELEASE NOTES

## General Provisions

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	ServiceLink	N/A	250536	

Updated to include buyer and/or seller signature labels instead of only the buyer signature label. The document will prompt to ask which signature labels should be included on the document.

Select Any

**General Provisions**  
Order 2014080299RB

A reference to some Contacts was encountered. Please choose any of the qualifying Contacts below.

- Check ▾
- Buyer/Borrower John Smith and Mary Smith (B)
- Seller Builder, LLC (S)
- Seller Sam Seller (S2)
- Buyer/Borrower Corporation (B2)

Document prompts to ask which contacts should be used for the buyer and seller signature labels.

OK

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

**BORROWER(S):**

\_\_\_\_\_  
John Smith \_\_\_\_\_ Date

\_\_\_\_\_  
Mary Smith \_\_\_\_\_ Date

**SELLER(S):**

\_\_\_\_\_  
Builder, LLC \_\_\_\_\_ Date

BY: \_\_\_\_\_ Date  
Lenny Builder  
President

BY: \_\_\_\_\_ Date  
Larry Builder  
Vice President

BY: \_\_\_\_\_ Date  
Sam Builder  
Sr. Vice President

The contacts selected from the prompt will be included in the buyer and seller signature labels.



# MARCH RELEASE NOTES

## Listing Agent Disclosure

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
New	ServiceLink	N/A	250536	SLD1073.doc

New document. Render to view complete document.

101 Test Avenue Tulare, IL 93274 Phone: (559)555-1111 / Fax: (559)555-2222
<p>Dear Client:</p> <p>To enable us to handle your escrow in a timely manner, please provide us with the following information since the Seller does not have knowledge of property information.</p> <p><b>PLEASE PROVIDE ALL ASSOCIATION DOCUMENTS TO THE BUYERS. UPFRONT FEES ARE TO BE PAID BY LISTING AGENT. ESCROW CAN NOT REIMBURSE FOR DOCUMENT FEES ON THE HUD.</b></p> <p>1. The property is affected by a community association:      <input type="checkbox"/> YES   <input type="checkbox"/> NO</p> <p><b><u>MASTER ASSOCIATION:</u></b></p> <p>Management Company: _____</p> <p>HOA: _____</p> <p>Phone No.: _____ Fax No.: _____</p> <p>Email: _____</p>

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# MARCH RELEASE NOTES

## Title

### Deed (Special/Limited Warranty)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
New	ServiceLink	N/A	246405	MTD0001.doc

New document. Render to view complete document.

**This Instrument Prepared By:**

Law Firm, LLC  
1234 S. Main Street  
Albany, CA 94707

**After Recording Return To:**

John Smith and Mary Smith  
1234 Main Street  
Albany, CA 94707

**SPECIAL/LIMITED WARRANTY DEED**

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# MARCH 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.

<b>Commission - Buyer</b> <b>Commission - Buyer Amended</b> <b>Commission - Seller</b> <b>Commission - Seller Amended</b>			
NEW/MOD	ACTION REQUIRED	APPLICABLE STATES/SITES	FILE NAME (NEW ITEMS ONLY)
Mod	None		
Deactivated per Tech Memo 128-2010.			

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<b>Separate Memorandum of Inst to Pay Commission – Listing/Selling</b> <b>Total Commission - Seller</b>			
NEW/MOD	ACTION REQUIRED	APPLICABLE STATES/SITES	FILE NAME (NEW ITEMS ONLY)
Mod	Add to trees		
Please add Separate Memorandum of Inst to Pay Commission – Listing/Selling (SCA0002557) and Total Commission - Seller (SCA0002692) to CT-IE and CT-SD trees. (They were removed from CA-All tree per Tech Memo 128-2010.			

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