

# SOFTPRO SELECT

## RELEASE NOTES



OCTOBER, 2017

Testing Release Date: October 5, 2017

Production Release Date: October 20, 2017



# OCTOBER RELEASE NOTES

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## ALL STATES/SITES

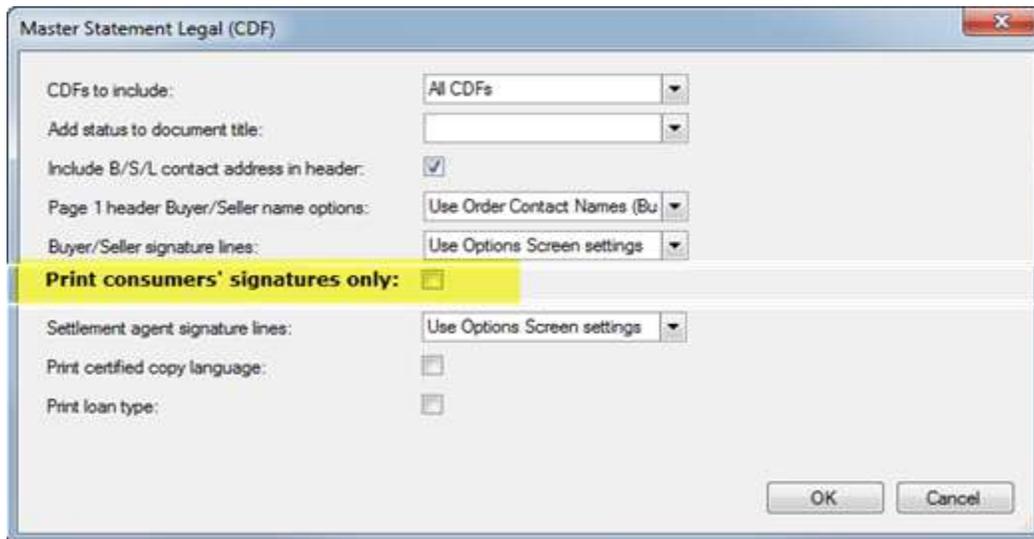
### DOCUMENTS

#### Escrow

#### CDF Master/Buyer Settlement Statements

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
413367	CORP		413367	

- New option added to the CDF Buyer/Master settlement statements
- Added a check box to "Print Consumers' Signatures Only:" and default to un-checked.



\* - once the new fields are available in SoftPro we will update this check box to default based on the signature selection from CDF page 5.

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#### Corporate Invoice Commercial

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
MOD	CORP		403441	

For 4.3 Commercial Orders added prompt for property selection:

- If order "is commercial" = true (or CSS settlement type) and properties > 1, invoice will show a picklist of properties for users to choose which properties will show on the invoice.

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# OCTOBER RELEASE NOTES

## Demand - Private

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
New	Settlement	N/A	414031	SSCORPD0360.doc

New document. Render to view complete document.



**CHICAGO TITLE  
COMPANY**

1001 Settlement Way, Suite 100  
Portland, OR 99999  
Phone: (800)555-1234 / Fax: (800)555-4321

Payoff Lender Bank  
1000 P and I Boulevard  
Beverly Hills, CA 90210

**Date:** October 3, 2017  
**Ref. No.:** PayoffRefNum11111  
**Escrow No.:** 2017040003RN-JDK  
**Borrower(s):** Stephen T. Seller and Stephanie T. Seller  
**Property:** 100 Property Street  
Portland, OR 97219

To whom it may concern,

We have an escrow involving real property upon which we understand you hold the beneficial interest under a deed of trust, originally executed by **Stephen T. Seller** and **Stephanie T. Seller**.

Said escrow provides that title will be conveyed to the buyer and your Trust Deed will remain a lien on the property.

Please fill in and sign the Beneficiary's Statement enclosed and return it together with any fire insurance policies you may hold, which policies will be returned to you at the close of escrow by the insurance agent.

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## Lost Check Indemnity

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	Wollinka Wikle Title	N/A	412952	

Removed verbiage at bottom that read "Any cost for the Stop Payment will be borne by ..."

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# OCTOBER RELEASE NOTES

## Reconveyance Cover Sheet

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	Centralized Recon Dept.	N/A	416030	

- 'Date of Payoff' will no longer prompt, but pull in the date from the posted disbursement to the Payoff Lender
- 'After Recording Return Reconveyance to' will pull in the Current Address if there is no Forwarding Address, and will now pull Borrower's Address for a Refi
- 'Exceptions from Preliminary Report/Commitment' will no longer prompt to select Exceptions, but instead pull in all of them

<b>Escrow No.:</b>	JM CD Test-MGS
<b>FULL RECONVEYANCE</b>	
<b>Date of Payoff:</b>	October 2, 2017
<b>Payoff Amt:</b>	\$15,000.00
<b>Lender Paid:</b>	Bank of America 1 Payoff Lender Street
<b>Loan No.:</b>	1234
<b>Property Address:</b>	1001 Property Address, City, OR 49503
<b>Tax Account No.:</b>	11-123 and 22-123
<b>Legal Description:</b>	SEE EXHIBIT "A" ATTACHED HERETO AND MADE A PART HEREOF
<b>After Recording Return Reconveyance to:</b>	Mortgagor Name 1 Seller Fwd Address Places, OR 45112

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# OCTOBER RELEASE NOTES

## WireSafe Fraud Alert

<b>NEW/MOD</b> Mod	<b>REQUESTED BY</b> FNT Sacramento	<b>FOOTPRINTS No(s).</b> N/A	<b>TFS No(s).</b> 415910	<b>FILE NAME (NEW ITEMS ONLY)</b>
-----------------------	------------------------------------------	---------------------------------	-----------------------------	-----------------------------------

Added functionality to allow two signors pull to the document when the contact is an organization.

Corporate officers/signees		
First Name	Middle Name	Last Name
Jane		Doe
John		Doe

### ACKNOWLEDGEMENT OF RECEIPT

Your signature below acknowledges receipt of this Wire Fraud Alert.

**Buyer 1**

**Buyer 2**

Signature

Signature

Jane Doe  
Printed Name

John Doe  
Printed Name

Address

Address

Date (800)111-2222  
Phone Number

Date (800)111-2222  
Phone Number

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# OCTOBER RELEASE NOTES

## REPORTS

### 1099-S Exceptions by Branch, Escrow Officer/Closers

NEW/MOD MOD	REQUESTED BY OR	FOOTPRINTS No(s).	TFS No(s). 416484	FILE NAME (NEW ITEMS ONLY)
Logic change <ul style="list-style-type: none"> <li>If gross proceeds = 0.00 and 1099-S Provided &amp; 1099-S Signed boxes are checked the file will not show on report.</li> <li>If the gross proceeds are 0.00 and no boxes are checked the currently existing error should still show that the property or services were not received</li> </ul>				

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### Batch Stale Dated Check Letter

NEW/MOD MOD	REQUESTED BY WA	FOOTPRINTS No(s).	TFS No(s). 413071	FILE NAME (NEW ITEMS ONLY)
Modified Letter Type: 'Due Diligence Letter #1' and 'Due Diligence Letter #2' Changes: <ul style="list-style-type: none"> <li>Verbiage Change: from 'Date:' to 'Date of Last Contact:'</li> <li>Date Change: 'Date of Last Contact' should pull Settlement Date - {{Order.SettlementDate}}</li> </ul>				

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### EPU Task Summary Reports

NEW/MOD MOD	REQUESTED BY CA FNT Socal	FOOTPRINTS No(s).	TFS No(s). 412310	FILE NAME (NEW ITEMS ONLY)
Added new tasks to display for " CA-FNT SoCal EPU Tasks"; <ul style="list-style-type: none"> <li>"EPU – Send E&amp;O" ; add after current "Update CPL -Refi"</li> <li>"EPU – Send Wire Instructions" add after new "EPU – Send E&amp;O" task.</li> </ul>				

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### Escrow Trial Balance

NEW/MOD MOD	REQUESTED BY FT WI	FOOTPRINTS No(s).	TFS No(s). 412764	FILE NAME (NEW ITEMS ONLY)
<ul style="list-style-type: none"> <li>Added settlement date between Order Date and Buyer/Borrower columns</li> </ul>				

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# OCTOBER RELEASE NOTES

## Open/Closed Orders by Selection

NEW/MOD MOD	REQUESTED BY CT Dallas	FOOTPRINTS No(s).	TFS No(s). 412330,415997	FILE NAME (NEW ITEMS ONLY)													
<p>On Parameter screen</p> <ul style="list-style-type: none"> <li>▪ Add new checkbox 'Include Rate Summary'               <ul style="list-style-type: none"> <li>○ When selected include rate summary at the end of the report with totals using the following breakdown.                   <ul style="list-style-type: none"> <li>▪ Transaction Type then,</li> <li>▪ Show each rate with report totals</li> </ul> </li> </ul> </li> </ul>																	
<div style="border: 1px solid green; padding: 2px; display: inline-block; margin-bottom: 10px;">Sample</div> <table border="1"> <thead> <tr> <th>Transaction Type</th> <th>Rate</th> <th>Total</th> </tr> </thead> <tbody> <tr> <td rowspan="2">Refi</td> <td>Tier 1/Centralized</td> <td>15</td> </tr> <tr> <td>Tier 2/Centralized</td> <td>12</td> </tr> <tr> <td rowspan="2">Purchase</td> <td>Tier 1/Centralized</td> <td>8</td> </tr> <tr> <td>Tier 2/Centralized</td> <td>17</td> </tr> </tbody> </table>					Transaction Type	Rate	Total	Refi	Tier 1/Centralized	15	Tier 2/Centralized	12	Purchase	Tier 1/Centralized	8	Tier 2/Centralized	17
Transaction Type	Rate	Total															
Refi	Tier 1/Centralized	15															
	Tier 2/Centralized	12															
Purchase	Tier 1/Centralized	8															
	Tier 2/Centralized	17															
<p>On excel export</p> <ul style="list-style-type: none"> <li>• Add Loan Type and the first Loan's loan percentage rate column</li> <li>• Add Lender Name column</li> </ul>																	

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## Orders by Selection

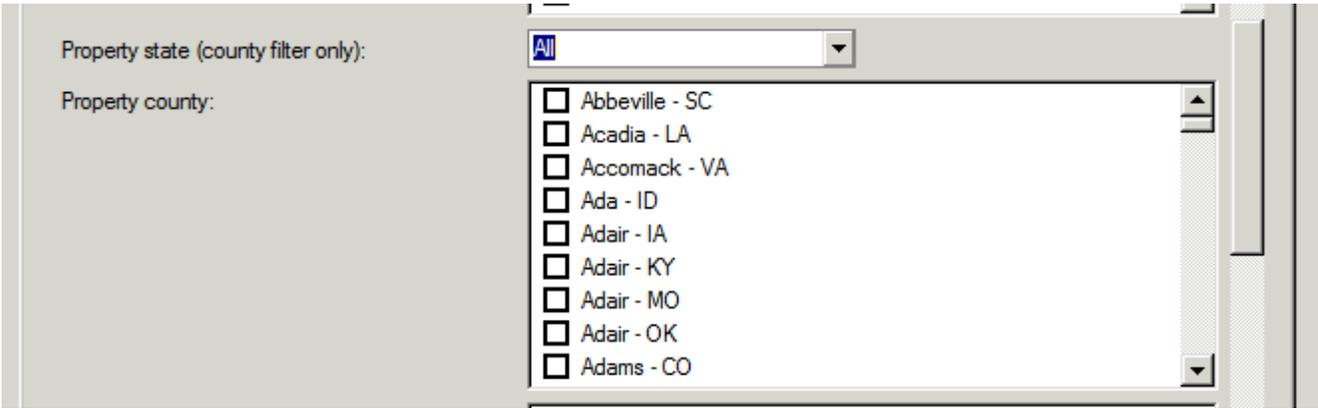
NEW/MOD MOD	REQUESTED BY CT IL, CA	FOOTPRINTS No(s).	TFS No(s). 413064, 410909,415999,412890	FILE NAME (NEW ITEMS ONLY)
<ul style="list-style-type: none"> <li>• Report will now show any pending amount for the orders being returned like the order log (ie removed the date restriction) when 'include pending revenue' box is checked. The posted logic would stay the same.</li> <li>• Added 'Rate' as an option to the group 1 and group 2 drop down.</li> <li>• Added new columns to Excel- All Columns format               <ul style="list-style-type: none"> <li>○ Policy Type</li> <li>○ Rate</li> </ul> </li> <li>• Update Excel- ALL and Excel- Brief               <ul style="list-style-type: none"> <li>○ If marketing main source email exists, then pull this email into column</li> <li>○ <i>else</i> if marketing source company email exists pull this email into column</li> <li>○ If neither exist value is blank</li> </ul> </li> </ul>				

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# OCTOBER RELEASE NOTES

<b>Orders by Status</b>				
NEW/MOD MOD	REQUESTED BY FT WI	FOOTPRINTS No(s).	TFS No(s). 412738	FILE NAME (NEW ITEMS ONLY)
<ul style="list-style-type: none"> <li>Between Status Date and Ledger Balance Column added 'Revenue Posted' column. This will show 'Yes' if revenue is posted or blank if not.</li> <li>Logic for revenue posted: a transfer is posted or an invoice is sent to a revenue contact</li> <li>Added note to footer to explain how revenue posted column will show yes if ledger transfer posted or invoice sent.</li> </ul>				

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<b>Orders Not Submitted</b>				
NEW/MOD MOD	REQUESTED BY WA	FOOTPRINTS No(s).	TFS No(s). 413067	FILE NAME (NEW ITEMS ONLY)
<ul style="list-style-type: none"> <li>Added 'Property State (county filter only)' and 'Property County' options on the parameter screen.</li> </ul>				
				

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<b>SPAdmin Custom Source Of Business</b>				
NEW/MOD MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s). 416037	FILE NAME (NEW ITEMS ONLY)
<ul style="list-style-type: none"> <li>Update the County Manager names for the following flash codes:               <ul style="list-style-type: none"> <li>FEUG = Randy Leeper</li> <li>FWTO = Maria Silvestri</li> </ul> </li> </ul>				

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# OCTOBER RELEASE NOTES

## ARIZONA

### DOCUMENTS

#### Title

#### Trustee's Sale Guarantee (AZ)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
New	CT Mohave	N/A	411634	G17S_TrustSa_AZ_xx_FNF

The Arizona TSG form has been updated to the 2017 version.

**TRUSTEE'S SALE**

---

Issued By:



**Fidelity National Title**  
Insurance Company

Guarantee Number:

**LoanPolNum-456**

SUBJECT TO THE EXCLUSIONS FROM COVERAGE, THE LIMITS OF LIABILITY AND OTHER PROVISIONS OF THE CONDITIONS AND STIPULATIONS HEREOF, FIDELITY NATIONAL TITLE INSURANCE COMPANY, a Florida corporation, herein called the Company

GUARANTEES the Assured against loss, not exceeding the liability amount stated in Schedule A, which the Assured shall sustain by reason of any incorrectness in the assurance which the Company hereby gives that, according to the public records, on the date stated in Schedule A,

1. The title to the estate or interest in the land described herein was vested in the vestee named in Schedule A, subject to the matters shown as Exceptions in Schedule B which Exceptions are not necessarily shown in order of their priority.
2. The names and addresses of persons who are entitled to a copy of the notice of sale pursuant to the provisions of A.R.S. Section 33-809 are shown herein; and
3. Said land is located in the county stated herein and, if designated, the newspaper or newspapers listed herein are acceptable for title insurance purposes for the publication of the notice of sale required in A.R.S. Section 33-808.

IN WITNESS WHEREOF, Fidelity National Title Insurance Company has caused this Guarantee to be signed and sealed as of the date of policy shown in Schedule A, the Guarantee to become valid when countersigned by an authorized signatory.

**XYZ Title Company**  
456 Title Way  
Anywhere, AZ 12345

Countersigned By: \_\_\_\_\_  
Authorized Officer or Agent

**Fidelity National Title Insurance Company**

By: \_\_\_\_\_  
  
President

Attest: \_\_\_\_\_  
  
Secretary



Trustee's Sale Guarantee (AZ) (08/17/2017) Printed: 10.18.17 @ 02:22 PM

Page 1 AZ---SPB-2750403-1--2017070004 - CP Test AZ



# OCTOBER RELEASE NOTES

## CALIFORNIA

### DOCUMENTS

#### Escrow

#### Affidavit (ALTA Home)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	State Counsel	N/A	414529	

Jurat added back to document (September change "rolled back" therefore footer date will once again reflect previous revision date of 9.10.15)

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#### Affidavit (Not Me)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
New	FT Santa Clara	N/A	414481	SCA0002588.doc

New document. Render to view complete document.

**NOT ME AFFIDAVIT**

**Escrow No.: JM CD Test-MGS**

The undersigned hereby affirms, under the penalty of perjury, that I/we are not the same person/persons named in that certain lien(s)/judgment(s) listed below. I/We are hereby affirming that we have no connection with, nor involvement with, the parties named in such lien(s)/judgment(s).

**Escrow Office Name** and **Underwriter Name** is requested to issue a policy of title insurance without taking exception to said matter and are relying on this signed affidavit.

I/We hereby hold **Escrow Office Name** and **Underwriter Name** harmless from any claim, costs, loss, responsibility, and liability which may arise should these assurances prove to be incorrect.

Name of Document	Recorded as
_____	Instrument No. _____

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# OCTOBER RELEASE NOTES

## Authorization to Publish Notice of Sale

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	Fresno Foreclosure Office	N/A	413295	

Revised to use the TIP Loan Coverage Amount for the Existing Lien Unpaid principal balance.

Loan:	1	Bank of America (\$125,000.00)
Policy lookup Code:	P06A_I_LoanPol	Coverage amount: \$125,000.00 <input type="checkbox"/> Coverage TBD
Policy version:	ALTA Loan Policy	

**YOUR TRUSTEE CANNOT PROCEED WITH THIS MATTER UNLESS THIS FORM HAS BEEN SIGNED AND RETURNED TO US WITH THE REQUESTED INFORMATION. PLEASE RETURN IT TO US AS SOON AS POSSIBLE.**

Publication of the notice of sale with respect to the above referenced matter can begin after [September 29, 2017](#) in order to publish we need signed approval from you to begin and we need to know of any funds advanced or received since this foreclosure started. As of the filing of the notice of default, we show a principal balance of **One Hundred Twenty-Five Thousand And No/100 Dollars (\$125,000.00)**. Please remit any deposit required.

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## Bulk - Statement re Consideration Deposited in Escrow - ABC-226

### Bulk - Statement re Consideration Deposited in Escrow - ABC-226 (Multiple Buyers)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	FT CA	N/A	414089	

Updated to match most recent version.

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# OCTOBER RELEASE NOTES

## Declaration of Default and Demand for Sale

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	Fresno Foreclosure Office	N/A	413106	

Revised to use the TIP Loan Coverage Amount for the Existing Lien Unpaid principal balance.

Loan:	1	Bank of America (\$125,000.00)
Policy lookup Code:	P06A_L_LoanPol	Coverage amount: \$125,000.00 <input type="checkbox"/> Coverage TBD
Policy version:	ALTA Loan Policy	

**BREACH AND DEFAULT HAS OCCURRED FOR NON-PAYMENT OF THE FOLLOWING: The unpaid principal balance of One Hundred Twenty-Five Thousand And No/100 Dollars (\$125,000.00) together with accrued interest all due and payable under the terms of the note, together with late charges, impounds, advances, taxes, and assessments, and attorney's fees.**

By reason of this default the undersigned, who holds the beneficial interest, makes this declaration of default and elects to cause the trust property to be sold to satisfy the obligations secured by this Deed of Trust.

Now owing the unpaid sum of One Hundred Twenty-Seven Thousand And No/100 Dollars (\$127,000.00) with interest from September 29, 2017 on the unpaid principal balance of One Hundred Twenty-Five Thousand And No/100 Dollars (\$125,000.00) and all sums advanced or expended as per the terms of this Deed of Trust, together with interest as provided.

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# OCTOBER RELEASE NOTES

## Foreclosure Title Instructions

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	Fresno Foreclosure Office	N/A	413090	

Revised the unpaid principal balance to pull from the TIP loan coverage amount and the legal description now pulls from the commitment legal field.

Loan:	1	Bank of America (\$125,000.00)
<a href="#">Policy lookup Code:</a>	P06A_L_LoanPol	Coverage amount: \$125,000.00 <input type="checkbox"/> Coverage TBD
Policy version:	ALTA Loan Policy	

**Please furnish Trustee's Sale Guarantee with liability of One Hundred Twenty-Five Thousand And No/100 Dollars (\$125,000.00), three (3) copies of T.S.G. and record the Notice of Default.**

The Subject Deed of Trust recorded on [September 11, 2015](#) in [Recording Information](#) in the [County of Monmouth](#).

Property Description:

[Property 1 Commitment Legal](#)

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# OCTOBER RELEASE NOTES

## Letter (Beneficiary Transmittal)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	Fresno Foreclosure Office	N/A	413091	

Added prompts for checkboxes items. Revised NOD recording date to pull the Completed Date for the checklist task with Record Notice of Default in the name and now pulls the due date for the Set Sale checklist task for the 3 month expiration date.

Task: Record Notice of Default

Due: (None) ▼

Completed: 09/18/2017 12:00 AM ▼

Task: Set Sale

Due: 11/27/2017 12:00 AM ▼

Completed: (None) ▼

Include Notice of Default?

Include a Copy of Trustee's Sale Guarantee?

Add Memo and Trustee's Certification List?

Include Declaration of Default?

Include Acknowledgment and Declaration of Non-Military Service?

Enclosed is a copy of the Notice of Default. It recorded: September 18, 2017

Enclosed is your copy of the Trustee's Sale Guarantee Policy.

The notice of default recorded on September 18, 2017 and the three (3) month period prior to publication expires on November 27, 2017.

In the event we have not received payment prior to the end of the three (3) month period, we will send you statement of the estimated fees and costs to proceed with a sale and an instruction to sign and return to us, together with the payment of fees and costs for us to proceed with the sale. If you do not wish for us to proceed with setting a sale at the end of the three (3) months, we will expect payment for the fees and costs incurred to that date, less the deposit you have paid.

Address Memo and Trustee's Certification List. - Please complete, sign and return.

Declaration of Default. - Please sign and return.

Acknowledgment and Declaration of Non-Military Service. - Please sign and return.

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# OCTOBER RELEASE NOTES

## Notice of Trustee's Sale Under Deed of Trust

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	Fresno Foreclosure Office	N/A	413380	

Revised to use the TIP Loan Coverage Amount for the Existing Lien Unpaid principal balance.

Loan:	1	Bank of America (\$125,000.00)
<a href="#">Policy lookup Code:</a>	P06A_L_LoanPol	Coverage amount: \$125,000.00 <input type="checkbox"/> Coverage TBD
Policy version:	ALTA Loan Policy	

The undersigned Trustee disclaims any liability for any incorrectness of the property address and other common designation, if any, shown herein.

The total amount of the unpaid balance of the obligation secured by the property to be sold and reasonable estimated costs, expenses and advances at the time of the initial publication of the Notice of Sale is **One Hundred Twenty-Five Thousand And No/100 Dollars (\$125,000.00)**.

Said amount will increase until date of sale.

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# OCTOBER RELEASE NOTES

## Substitution of Trustee (Corporate Bond)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
New	CT Sacramento	N/A	414507	SCA0002833.doc

New document. Render to view complete document.

**RECORDING REQUESTED BY:**

Title Office Name

Title No.: T2 Ref

Escrow Order No.: JM CD Test

**When Recorded Mail Document To:**

Bob L. Buyer and Betty A. Buyer

1 Buyer Fwd Address

San Diego, CA 86401

APN/Parcel ID(s): 11-123

SPACE ABOVE THIS LINE FOR RECORDER'S USE

### SUBSTITUTION OF TRUSTEE

Pursuant California Civil Code Section 2941.7(f) and Accompanying Corporate Bond

WHEREAS, Mortgagor Name was the original Trustor, Trustee was the original Trustee, and Mortgagee was the original Beneficiary under that certain Deed of Trust dated \_\_\_\_\_ and recorded on \_\_\_\_\_, as \_\_\_\_\_ of \_\_\_\_\_ Official Records of Santa Clara County, State of California, and

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# OCTOBER RELEASE NOTES

## Title

**ALTA 18.2-06 - Multiple Tax Parcel**

**ALTA 46-06 - Option**

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
New	Form Filing	N/A	417604	E16A018_02_FNF, E15A046_00_FNF

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

**ENDORSEMENT - ALTA 18.2-06**

Issued By:



CHICAGO TITLE INSURANCE COMPANY

Charge: \$0.00

The Company insures against loss or damage sustained by the Insured by reason of those portions of the Land identified below not being assessed for real estate taxes under the listed Tax Identification Numbers or those Tax Identification Numbers including any additional land:

Parcel:	Tax Identification Numbers:
FILL IN	FILL IN

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:

Countersigned By:

\_\_\_\_\_

Authorized Officer or Agent

**MULTIPLE TAX PARCEL**

Attached to Owner's Policy Number:

**X2013100007 - CP Test WI**

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# OCTOBER RELEASE NOTES

## LOOKUP TABLES

### Payoff Contact – New Paydown Check box

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
New	Jeanette Haines	N/A	N/A	

If **“Paydown Loan”** box is checked it will now pull in new verbiage into Special Instructions field to indicate **“PayDOWN”**, if not checked it will pull in **“PayOFFCLOSE”**.

The screenshot displays the 'Payoff Lender' form with the following details:

- Lookup code:** 1STP5901
- Name:** 1st United Services Credit Union
- Short name:** 1st United Services Credit Union
- Payee name:** 1st United Services Credit Union
- Address:** ATTN: Real Estate Lending Dept., 5901 Gibraltar Drive, Pleasanton, CA 94588
- Phone:** (800)649-0193, **Fax:** (925)598-4844
- Reference #:** 2017-1

Two 'Outgoing Wire Information' sections are shown side-by-side:

- Left Section (Paydown Loan checked):** Special instructions: PayDOWN 2017-1 Sandy 4814 Wamblee Ave.
- Right Section (Paydown Loan unchecked):** Special instructions: PayOFFCLOSE 2017-1 Sandy 4814 Wamblee Ave.

Red dashed arrows point from the 'Paydown Loan?' checkbox in each section to its corresponding 'Special instructions' field.

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# OCTOBER RELEASE NOTES

## MY SCREENS

### National Rate Calculator Screen (MyScreens: SoCal Out of State Orders)

NEW/MOD New	REQUESTED BY Orange Co - RLC	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
----------------	---------------------------------	-------------------	------------	----------------------------

The National Rate Screen is now available for use with all residential transactions when the SoCal Out of State Orders MyScreens is selected.

**Open Order/General**

- Order Entry
- Policy Selection
- National Rate Screen**
- National Rate Screen - Refi
- State Specific Info
- Status
- Order Contacts

The screen provides information or prompts you with questions (similar to the National Rate Calculator) pertinent to the state of the insured property.

**National Rate Screen**

Order Status: InProcess  
 Buyer: Bobby Buyer  
 Transaction Type: Purchase

---

Type of Order:

Escrow Referral Percent:  %

Customer Name:

Alerts: 

You may select only an ALTA Standard policy  
Simultaneous Rate on Loan Policy is an estimate only based on the National Rate Calculator. Actual rate may be more or less than the amount shown

Owner's Premium:

Owner's Liability:

Owner's Pol Type:

Instructions: 

Is this transaction eligible for the Reissue Rate?

Click [HERE](#) to access the Job Aid.

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# OCTOBER RELEASE NOTES

## *AUTOMATION*

### 360 Sync Automation

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

SoftPro 360 Sync process allows an Escrow and a Title Operation, who do not share profiles, to exchange data and documents on out-of-county orders. Automation process eliminates the need to manually send and/or accept SoftPro 360 Sync Escrow transactions.

Use Link to access Job Aids

- [Escrow](#)
- [Title](#)

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# OCTOBER RELEASE NOTES

## FLORIDA

### DOCUMENTS

#### Escrow

#### Approval of Transfer and Certificate of Termination of First Right of Refusal

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
New	Professional Title	N/A	412532	FLD1307.doc

New document. Render to view complete document.



### CHICAGO TITLE COMPANY

APPROVAL OF TRANSFER AND  
CERTIFICATE OF TERMINATION  
OF FIRST RIGHT OF REFUSAL

STATE OF \_\_\_\_\_

Escrow No.: 2017040003RN-JDK

COUNTY OF \_\_\_\_\_

The undersigned Jane Smithers, \_\_\_\_\_, of Sunny Meadows HOA, hereby certifies that the transfer of ownership by Stephen T. Seller and Stephanie T. Seller to Brian T. Buyer, Brenda T. Buyer and The Trust Company, in the real property located and recorded in Hillsborough County, Florida, more specifically described as:

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

was properly approved and the condominium association hereby relinquishes its first right of refusal as required by the Declaration of Condominium.

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Prepared By: ISG

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# OCTOBER RELEASE NOTES

## Check Request - New Smyrna Lien Search

<b>NEW/MOD</b> New	<b>REQUESTED BY</b> Professional Title	<b>FOOTPRINTS No(s).</b> N/A	<b>TFS No(s).</b> 412532	<b>FILE NAME (NEW ITEMS ONLY)</b> FLD1310.doc
-----------------------	----------------------------------------------	---------------------------------	-----------------------------	--------------------------------------------------

New document. Render to view complete document.



**CHICAGO TITLE  
COMPANY**

**CHECK REQUEST  
UPON FINAL PAYMENT**

Request Date: October 17, 2017

Rush:  Yes       No

Date Check Needed: \_\_\_\_\_

*\*ASAP\* not applicable*

Rush Reason (required if rush): \_\_\_\_\_

Payable To: Chicago Title Insurance Company

Remit to Address: 1001 Settlement Way, Suite 100  
Portland, FL 99999

Check Amount: \$25.00

Company	Operation	Function	GL Account	State Location Code*	Amount
01007	161154	300			\$25.00

\*State Location Code only required for Taxes, Licenses and Insurance Fees

Description of Service: City Lien Search – New Smyrna Beach

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# OCTOBER RELEASE NOTES

## Notice of Termination with Contractor's Affidavit

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	State Counsel	N/A	414446	

Revised language to match version provided by State Counsel.

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## Waiver and Release of Lien Upon Final Payment

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
New	Trident Title	N/A	416174	FLD1309.doc

New document. Render to view complete document.



### CHICAGO TITLE COMPANY

WAIVER AND RELEASE OF LIEN  
UPON FINAL PAYMENT

The undersigned lienor, in consideration of the final payment in the amount of One Thousand Two Hundred And No/100 Dollars (\$1,200.00), hereby waives and releases its lien and right to claim a lien for labor, services, or materials furnished to [Bill Williams](#) on the job of [Stephen T. Seller](#) and [Stephanie T. Seller](#) to the following described property:

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

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

Dated on this 17th day of October, 2017.

[General Contractor Company, Inc.](#)

\_\_\_\_\_  
Signature

By: [Gary T. Contractor](#) \_\_\_\_\_  
Print Name

Its: [Foreman](#) \_\_\_\_\_  
Print Title

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# OCTOBER RELEASE NOTES

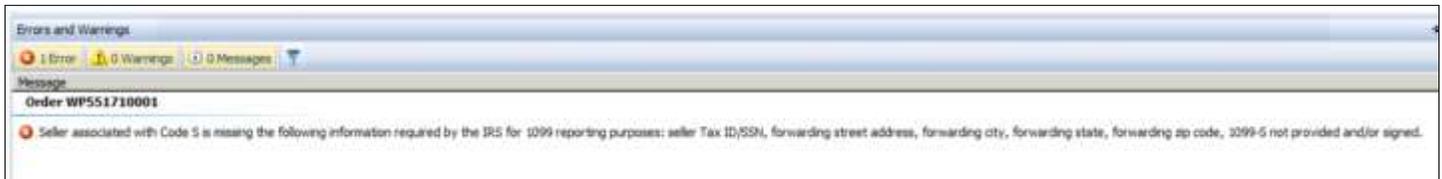
## CUSTOM ORDER RULE

### Missing 1099 Data

NEW/MOD MOD	REQUESTED BY LCT-Trident	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
----------------	-----------------------------	-------------------	------------	----------------------------

Custom Order Rule implemented when Seller 1099 information is missing. An error displays when saving the Order and prohibits the save until the information is entered.

The error message displayed states: ***Seller associated with Code S is missing the following information required by the IRS for 1099 reporting purposes: [list of missing information].***



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# OCTOBER RELEASE NOTES

## FIRST TITLE OF GEORGIA

### DOCUMENTS

#### Escrow

#### Deed (Special Warranty - MS HUD)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	First Title - MS	N/A	415974	

Revised to match original.

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# OCTOBER RELEASE NOTES

## SCREEN CHANGE

### Options Screen Change (MyScreens: First Title of Georgia – All Screens)

NEW/MOD MOD	REQUESTED BY FT of Georgia	FOOTPRINTS No(s). 418370	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
----------------	-------------------------------	-----------------------------	------------	----------------------------

Settlement Statement fields added to the **Options** Screen allows for customization of what is displayed on the Statement.

- › Text to overwrite Settlement Statement header 'Settlement Date' label
- › Text to overwrite Settlement Statement header 'Property' label
- › Text to overwrite Settlement Statement title  
(requires printer prompt Add status to document title be set to Custom)
- › Print settlement agent signature on CDF settlement statement  
(requires printer prompt Settlement agent signature lines be set to User Options Screen settings)



The screenshot shows the 'Options' screen with the following elements:

- Order Status: InProcess
- Buyer: [blank]
- Transaction Type: Purchase
- Use optional Closing Disclosure forms for transactions not involving seller (Refinance)
- Sort CDF page 2 lines descriptions alphabetically on order save
- CDF Page 4: [text input]
- CDF Page 5: [text input]
- Text to overwrite Settlement Statement header 'Settlement Date' label:** [text input]
- Text to overwrite Settlement Statement header 'Property' label:** [text input]
- Text to overwrite Settlement Statement title:** [large text area]
- Print settlement agent signature on CDF settlement statement

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# OCTOBER RELEASE NOTES

## HAWAII

### MY SCREENS

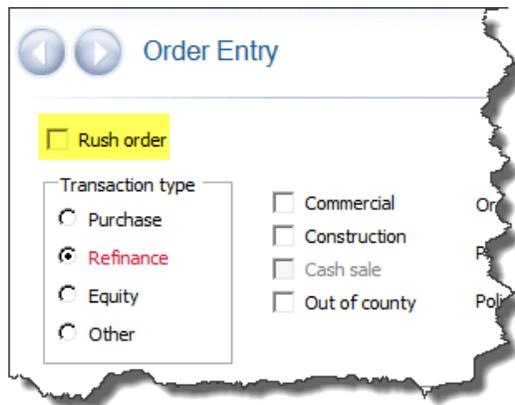
#### Escrow

#### Order Entry

NEW/MOD Mod	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s). 349311

Added the 'Rush Order' checkbox (aka Order.IsRush) to *the very top* of the Order Entry screen (in the Open Order/General category) in the following screen sets:

- HI All Screens
- HI Escrow Screens
- HI Title Screens



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# OCTOBER RELEASE NOTES

## REPORTS

<b>Invoice Exceptions</b>				
<b>NEW/MOD MOD</b>	<b>REQUESTED BY</b>	<b>FOOTPRINTS No(s).</b>	<b>TFS No(s).</b> 415506	<b>FILE NAME (NEW ITEMS ONLY)</b>
If Profile State = WA, OR, HI, ID, MT				
<ul style="list-style-type: none"><li>• New Exception: 'Un-Invoiced Title Only'<ul style="list-style-type: none"><li>○ Note: This is distinct from the existing Un-invoiced TO Order (distributed task) exception.</li><li>○ Logic: Order type = Title only and no sent invoices in the order</li><li>○ Suppressed 'Un-invoiced TO Order (distributed task) exception' for the same states above</li></ul></li></ul>				

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# OCTOBER RELEASE NOTES

## IDAHO

### REPORTS

<b>Invoice Exceptions</b>				
<b>NEW/MOD MOD</b>	<b>REQUESTED BY</b>	<b>FOOTPRINTS No(s).</b>	<b>TFS No(s).</b> 415506	<b>FILE NAME (NEW ITEMS ONLY)</b>
If Profile State = WA, OR, HI, ID, MT <ul style="list-style-type: none"> <li>• New Exception: 'Un-Invoiced Title Only'               <ul style="list-style-type: none"> <li>○ Note: This is distinct from the existing Un-invoiced TO Order (distributed task) exception.</li> <li>○ Logic: Order type = Title only and no sent invoices in the order</li> <li>○ Suppressed 'Un-invoiced TO Order (distributed task) exception' for the same states above</li> </ul> </li> </ul>				

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# OCTOBER RELEASE NOTES

## MY SCREENS

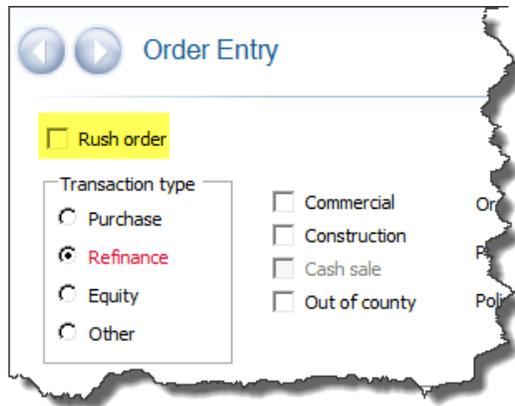
### Escrow

#### Order Entry

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).
Mod			349311

Added the 'Rush Order' checkbox (aka Order.IsRush) to *the very top* of the Order Entry screen (in the Open Order/General category) in the following screen sets:

- IDMT All Screens
- IDMT Title Screens



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# OCTOBER RELEASE NOTES

## ILLINOIS

### DOCUMENTS

#### Escrow

#### Personal Information Affidavit

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	Corporate Compliance	N/A	415050	

Added section for affiant's place of birth.

This affidavit for the confidential use of the [Chicago Title Insurance Company](#) will assist in determining whether certain matters of record affect the title under consideration, or whether they relate to other persons whose names are similar to those of the owner or former owners. Please draw a line through alternate statements which do not apply.

\_\_\_\_\_ certifies, avows and affirmatively represents that \_\_\_\_\_  
is the \_\_\_\_\_ of the premises described in the above order.  
(Owner, former owner, contract purchaser, etc.)

The affiant's social security no. is: xxx-xx- \_\_\_\_\_ 1.  has never been married  
The affiant's Date of Birth is: \_\_\_\_\_ 2.  the widow of \_\_\_\_\_  
3.  married to \_\_\_\_\_

The affiant's Place of Birth is: \_\_\_\_\_ said marriage having taken place in \_\_\_\_\_ and  
(City) \_\_\_\_\_ year  
(State) \_\_\_\_\_ whose maiden name was \_\_\_\_\_  
(Country) \_\_\_\_\_ See No. 1 below

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# OCTOBER RELEASE NOTES

## REPORTS

### Orders by Selection

NEW/MOD MOD	REQUESTED BY IL	FOOTPRINTS No(s).	TFS No(s). 412026	FILE NAME (NEW ITEMS ONLY)
----------------	--------------------	-------------------	----------------------	----------------------------

- Removed fields listed below from Excel -IL

<b>Settlement AgentLookup Code</b>	Only the primary settlement agent Code "A" (not multiple); otherwise I have to manually remove each month
<b>Settlement Agent Name</b>	Remove
<b>Settlement Agent Contact Lookup Code</b>	Remove
<b>Settlement Agent Contacts</b>	Remove
<b>Settlement Agent Contact Mkt Info</b>	Remove
<b>Settlement Agent Address</b>	Remove
<b>Settlement Agent Phone</b>	Remove
<b>Settlement Agent Fax</b>	Remove
<b>Settlement Agent Email</b>	Remove
<b>Settlement Agent Reference Number</b>	Remove

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# OCTOBER RELEASE NOTES

## INDIANA

### DOCUMENTS

#### Escrow

#### EI Disbursement

#### EI Disbursement (Legal)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	FNT NW Indiana	N/A	417376	

\*\*FNT NW Indiana only

Removed the checkbox for *Deposit in Local Bank*.

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#### Letter (Policy)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	FNT Indiana	N/A	412965	

- Revised the Date at the top right to pull the Closing Date instead of the Current Date
- If a Short Form Owner's Policy, "Recorded Deed" and "Endorsements" will no longer show
- Replaced the Signature Name, Title, and Email with 'The Staff of [Title Office Name]'

Bob L. Buyer and Betty A. Buyer  
1 Buyer Fwd Address  
Place, IN 86401

Date: **September 22, 2017**

Dear Bob L. Buyer and Betty A. Buyer:

Thank you for using Title Office Name. We appreciate the opportunity to serve your title needs. Please find enclosed the following:

OWNERS POLICY ITEMS: ORIGINAL TO OWNER

Policy No. 40 306 JM CD Test

ADDITIONAL OWNERS POLICY ITEMS:

[Additional items go here](#)

**Recorded Deed and Endorsements will not show for a Short Form Owner's Policy**

We look forward to serving you in the future. Should you have questions regarding your policy of title insurance, please call our Final Policy Department at (888)111-2222.

Sincerely,

**The Staff of Title Office Name**

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# OCTOBER RELEASE NOTES

## Title

**ALTA 18.2-06 - Multiple Tax Parcel**  
**ALTA 19.2-06 - Contiguity - Specified Parcels**  
**ALTA 46-06 - Option**

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
New	Form Filing	N/A	417608	E16A018_02_FNF, E15A019_02_FNF, E15A046_00_FNF

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

**ENDORSEMENT - ALTA 18.2-06**

Issued By:



CHICAGO TITLE INSURANCE COMPANY

Charge: \$0.00

The Company insures against loss or damage sustained by the Insured by reason of those portions of the Land identified below not being assessed for real estate taxes under the listed Tax Identification Numbers or those Tax Identification Numbers including any additional land:

Parcel:	Tax Identification Numbers:
FILL IN	FILL IN

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:

Countersigned By:

\_\_\_\_\_

Authorized Officer or Agent

**MULTIPLE TAX PARCEL**

Attached to Owner's Policy Number:

**X2013100007 - CP Test WI**

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# OCTOBER RELEASE NOTES

## REPORTS

<b>Commissions by Sales Rep</b>				
<b>NEW/MOD MOD</b>	<b>REQUESTED BY FT IN</b>	<b>FOOTPRINTS No(s).</b>	<b>TFS No(s). 412720</b>	<b>FILE NAME (NEW ITEMS ONLY)</b>
<ul style="list-style-type: none"><li>• On the parameter screen – added a text box to search by 'marketing source name contains'</li><li>• When profile State = IN, the escrow revenue = ESC + SEA</li><li>• Changed how the column pulls the escrow revenue and updated the footer note.</li></ul>				

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# OCTOBER RELEASE NOTES

## LANDCASTLE

### DOCUMENTS

#### Escrow

#### Shellpoint (Cover Sheet - Deed Package FL)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	LandCastle	N/A	413400	

Replaced old version with new.

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# OCTOBER RELEASE NOTES

## MICHIGAN

### *DOCUMENTS*

#### Escrow

<b>Purchaser's Satisfaction</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 MI	N/A	415978	
Revised document to match new version provided.				

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# OCTOBER RELEASE NOTES

## Title

**ALTA 18.2-06 - Multiple Tax Parcel**  
**ALTA 19.2-06 - Contiguity - Specified Parcels**  
**ALTA 46-06 - Option**

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
New	Form Filing	N/A	417605	E16A018_02_FNF, E15A019_02_FNF, E15A046_00_FNF

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

**ENDORSEMENT - ALTA 18.2-06**

Issued By:



CHICAGO TITLE INSURANCE COMPANY

Charge: \$0.00

The Company insures against loss or damage sustained by the Insured by reason of those portions of the Land identified below not being assessed for real estate taxes under the listed Tax Identification Numbers or those Tax Identification Numbers including any additional land:

Parcel:	Tax Identification Numbers:
FILL IN	FILL IN

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:

Countersigned By:

\_\_\_\_\_

Authorized Officer or Agent

**MULTIPLE TAX PARCEL**

Attached to Owner's Policy Number:

**X2013100007 - CP Test WI**

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# OCTOBER RELEASE NOTES

## REPORTS

<b>SPAdmin – Custom Source of Business Export</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	PCD		412693	
<ul style="list-style-type: none"><li>• Updated the report logic (and programming notes) to exclude orders with owning profile starting with:<ul style="list-style-type: none"><li>◦ <a href="#">\\Default\P\Michigan\CT\CPU\FXHN</a></li></ul></li></ul>				

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# OCTOBER RELEASE NOTES

## MONTANA

### DOCUMENTS

#### Escrow

#### Letter (Tax Withholding)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	Flathead Valley	N/A	414638	

Replaced hardcoded "first half" with prompt.

How much to pay to the County Treasurer

full year

At the request of [Bank of America](#), you are hereby instructed to withhold from the [buyer/borrower\(s\)](#) after the close of the above referenced escrow, the sum of Five Hundred Fifty And No/100 Dollars (\$550.00) which, upon receipt of the [2017](#) tax statement, you are instructed to pay to the [Orange](#) County Treasurer for the full year of the [2017](#) taxes. (This figure has been calculated based on the [2016](#) taxes.)

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# OCTOBER RELEASE NOTES

## REPORTS

### Invoice Exceptions

NEW/MOD MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s). 415506	FILE NAME (NEW ITEMS ONLY)
If Profile State = WA, OR, HI, ID, MT				
<ul style="list-style-type: none"><li>• New Exception: 'Un-Invoiced Title Only'<ul style="list-style-type: none"><li>○ Note: This is distinct from the existing Un-invoiced TO Order (distributed task) exception.</li><li>○ Logic: Order type = Title only and no sent invoices in the order</li><li>○ Suppressed 'Un-invoiced TO Order (distributed task) exception' for the same states above</li></ul></li></ul>				

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# OCTOBER RELEASE NOTES

## MY SCREENS

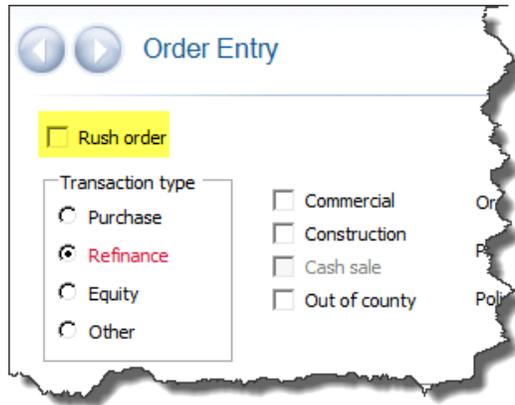
### Escrow

#### Order Entry

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).
Mod			349311

Added the 'Rush Order' checkbox (aka Order.IsRush) to *the very top* of the Order Entry screen (in the Open Order/General category) in the following screen sets:

- MT All Screens
- MT Escrow Screens
- MT Title Screens



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# OCTOBER RELEASE NOTES

## OHIO

### DOCUMENTS

#### Escrow

#### Escrow Trust Instructions (Earnest Money)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
New	CT Cleveland	N/A	416897	OHD1381.doc

New document. Render to view complete document.



**ESCROW TRUST INSTRUCTIONS  
(EARNEST MONEY)**

Melissa G. Smith, Closing Specialist  
Escrow Office Name, Escrow Trustee  
100 Main Street, Suite 100  
Cleveland, OH 44114  
Phone: (800)111-2222 Fax: (800)222-3333

Date: October 11, 2017  
Escrow No.: JM CD Test-MGS

**CUSTOMER IDENTIFICATION:**

Seller(s): Sam E. Seller and Sally A. Seller  
Purchaser(s): Bob L. Buyer and Betty A. Buyer  
Property Address: 1001 Property Address, City, OH 49503  
Proposed Disbursement Date: October 16, 2017

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#### File Cover - Toledo

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	CT OH	N/A	415289	

Added email to the attorney contact information.

<b>Seller's Attorney:</b> Anderson & Anderson (888)333-2222 <a href="mailto:SellerAttorney@email.com">SellerAttorney@email.com</a>	<b>Buyer's Attorney:</b> Morgan & Morgan (888)333-4444 <a href="mailto:BuyerAttorney@email.com">BuyerAttorney@email</a>
---------------------------------------------------------------------------------------------------------------------------------------------	----------------------------------------------------------------------------------------------------------------------------------

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# OCTOBER RELEASE NOTES

## Letter (Loan Policy - JV)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	CT North Ohio	N/A	413394	

Added prompt for recording information and removed duplicate text from end of letter.

In connection with the above captioned transaction, enclosed herewith please find the following:

ALTA Loan Policy  
Mortgage recorded as  
Loan No.: L12345

Recording information goes here



Loan 1 Security Instrument
Recording Information
Recording information goes here

If you should have any questions or concerns, please do not hesitate to call me at the number listed above. Thank you for using Title Office Name. We look forward to working with you in the future.

~~We look forward to working with you in the future.~~

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# OCTOBER RELEASE NOTES

## Title

**ALTA 18.2-06 - Multiple Tax Parcel**

**ALTA 23.1-06 - Co-Insurance - Multiple Policies**

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
New	OTIRB Filing	N/A	417607	E16A018_02_FNF, E16A023_01

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

**ENDORSEMENT - ALTA 18.2-06**

Issued By:



CHICAGO TITLE INSURANCE COMPANY

Charge: \$0.00

The Company insures against loss or damage sustained by the Insured by reason of those portions of the Land identified below not being assessed for real estate taxes under the listed Tax Identification Numbers or those Tax Identification Numbers including any additional land:

Parcel:	Tax Identification Numbers:
FILL IN	FILL IN

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:

Countersigned By:

\_\_\_\_\_

Authorized Officer or Agent

**MULTIPLE TAX PARCEL**

Attached to Owner's Policy Number:

**X2013100007 - CP Test WI**

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# OCTOBER RELEASE NOTES

## MY SCREENS

### Greater Metro Taxes Screens

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
NEW	OH-Greater Metro	418372		

The **Greater Metro Taxes** screens are available when the **OH Title** profile is selected.

**Open Order/General**

**Greater Metro Taxes**

- City/Town Taxes
- County Taxes
- Assessments
- Additional Taxes

**Commitment**

The image shows four overlapping screenshots of the software interface, each representing a different tax screen. Red arrows originate from the 'Greater Metro Taxes' menu items and point to the corresponding screenshots:

- City/Town Taxes:** Shows a header with a left arrow and right arrow, and a title 'City/Town Taxes'. Below it, there are sections for 'Tax Status & Dates', 'City/Town taxes', 'Tax payment', and 'Current tax p'.
- County Taxes:** Shows a header with a left arrow and right arrow, and a title 'County Taxes'. Below it, there are sections for 'Tax Status & Dates', 'County taxes', 'Tax payment', and 'Current tax p'.
- Assessments:** Shows a header with a left arrow and right arrow, and a title 'Assessments'. Below it, there are sections for 'Tax Status & Dates', 'Assessments', 'Tax payment', and 'Current tax p'.
- Additional Taxes:** Shows a header with a left arrow and right arrow, and a title 'Additional Taxes'. Below it, there is a section for 'Additional Taxes (1)' with a table:
 

Description	Line	From	To
(Empty)			

 Below the table is a section for 'Tax Status & Dates' and a text input field for 'Additional taxes or other purpose:'.

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# OCTOBER RELEASE NOTES

## OKLAHOMA

### *DOCUMENTS*

#### Escrow

#### Generic Enclosure Letter - Title

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	CT Oklahoma	N/A	412850	

Revised so that if Policy Type is Owner's Only, the signature will now print on the document.

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# OCTOBER RELEASE NOTES

## OREGON

### DOCUMENTS

#### Escrow

#### DHS Estate Administration

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
New	Western Title	N/A	412888	ORD1456.doc

New document. Render to view complete document.

#### FOR TITLE COMPANY USE ONLY, THANK YOU.

Date: September 27, 2017

To: Anderson & Anderson  
Anderson Law Ln., New York, NY 00000

Sender: Title Office Name

Phone: (888)333-2222

Phone: (888)111-2222

Fax: (888)333-2244

Fax: (888)333-4444

RE: Order or Escrow No.: JM CD Test  
Property: 1001 Property Address, City, OR 49503

PLEASE REPLY REGARDING THE INFORMATION BELOW. IS THERE A CLAIM AGAINST THE ESTATE(S) OF THESE INDIVIDUALS?

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#### Form WC (Affirmation for Withholding on OR Real Property)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	Western Title	N/A	416952	

Revised to render for any/all sellers.

Please make one or more selections for each document below.

Check

Form WC (Affirmation for Withholding on OR Real Property)

Seller Sam E. Seller and Sally A. Seller (S)

Seller Susan A. Seller (S2)

Submit original form—do not submit photocopy.

Transferor first name, middle initial, and last name Susan A. Seller	Social Security no. (SSN)/FEIN of transferor	Transferor is (check one)	
Transferor spouse first name, middle initial, and last name	Spouse Social Security number (SSN)	<input type="checkbox"/> Individual	<input type="checkbox"/> C corporation
Transferor's address 1 Seller F wd Address	City City	State OR	ZIP code 49503

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# OCTOBER RELEASE NOTES

## Letter (Confirmation of Order Placed)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	Western Title	N/A	413035	

Various changes to document based off the Order Type of 'Title only' and 'Title & Subescrow'.

Order type:	Title only
Product type:	(None)
Policy type:	Title only
	Escrow only
	Title & Escrow
	Limited Coverage Product
	Other
	Title & Subescrow

Name document that has been ordered
Preliminary Title Report

Date to receive copies by
10/06/2017

**Date:** September 29, 2017  
**Order No.:** JM CD Test-JDK  
**Buyer(s):** Bob L. Buyer and Betty A. Buyer  
**Seller(s):** Sam E. Seller and Sally A. Seller  
**Property:** 1001 Property Address  
 City, OR 49503

Thank you for choosing **Title Office Name**. Your transaction has been opened under **order** no. JM CD Test-JDK. We have ordered a **Preliminary Title Report** and you will receive copies by **October 6, 2017**.

**Title Office Name** is dedicated to providing customers with quality professional service. Please contact us should you have any questions or need further assistance.

We look forward to serving your future **title** needs.

**Joseph D. Kirby, Closing Specialist**  
**Phone:** (888)111-1234 **Email address:** [joe.kirby@email.com](mailto:joe.kirby@email.com)

Choose contact for letter
Title Officer
Current User
Title Officer

**Notice:** Please be aware that due to the conflict between federal and state laws concerning the cultivation, distribution, manufacture or sale of marijuana, the Company is not able to close or insure any transaction involving Land that is associated with these activities.

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# OCTOBER RELEASE NOTES

## Letter (Demand Instructions)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	Western Title	N/A	412954	

Added prompt to accommodate listing other documents.

Field Prompt

**Letter (Demand Instructions)**  
Other Credit Card Company (O)

Other Credit Card Company (O)

List other documents to be listed

doc1  
doc2  
doc3

**Greetings**

We are handling a transaction in which your lien on the above referenced property will be paid in full. In order to complete the closing and payoff the balance due to you, we enclose the following documents for your signature:

1. Escrow Instructions for Payoff and Demand - please complete and sign as indicated
2. [Warranty Deed](#) - Must be signed before a Notary
3. doc1
4. doc2
5. doc3

Please return the executed documents via overnight delivery.

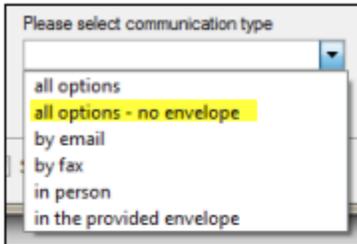
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# OCTOBER RELEASE NOTES

## Letter (Opening)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	FNT Portland	N/A	412963	

Added a "no envelope" selection to the drop-down prompt for the Buyer and Seller versions.



### Buyer Version:

Please take a moment to complete the enclosed information sheet and return it by **email, fax, or in person** to help us better serve you.

### Seller Version:

In order to expedite the closing, we ask that you complete the enclosed "Seller Information Sheet" and return it to us by **email, fax, or in person**. If you have a lease or rental agreement affecting the property, or if there are special matters not shown on the title report which you receive, please contact us immediately with this information.

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# OCTOBER RELEASE NOTES

## Personal Property Tax Transfer Notice

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
New	Western Title	N/A	414518	ORD1459.doc

New document. Render to view complete document.



**DEPARTMENT OF ASSESSMENT AND  
TAXATION PERSONAL PROPERTY TAX  
DEPARTMENT COUNTY OF PROP COUNTY**

**Escrow No.:** JM CD Test-MGS  
**Personal Property Tax Account No.:** 12345

Please consider this letter as a formal notice of the sale of the personal property located at:  
 1001 Property Address, City, OR 49503

Until further notice, all future correspondence in regards to the above referenced **Personal Property Tax Account(s)** should be forwarded to:

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## Power of Attorney Approval Form

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	OR	N/A	415294	

Document has been inactivated in favor of "Power of Attorney Approval Request".

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# OCTOBER RELEASE NOTES

## Satisfaction (Support - with Explanation)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
New	Western Title	N/A	414513	ORD1458.doc

New document. Render to view complete document.

### EXPLANATION SHEET FOR SATISFACTION OF SUPPORT

Oregon law (ORS 18.225) says that when a money award (like the child and/or spousal support award in your case) has been partially or fully satisfied, it is the obligee/judgment creditor's responsibility to file a satisfaction in the county where the support award was originally entered. A satisfaction is proof that money has been paid or the debt is no longer owed.

Since your support case is handled by the Oregon Child Support Program, you will need to send your satisfaction to the Department of Justice (DOJ) at the address listed below. DOJ will check its accounting records and send the satisfaction to the correct court. The court will only satisfy the amount DOJ authorizes. **Please Note:** You may only satisfy support that was due in the past. You cannot satisfy future support.

One (1) or more satisfaction form(s) is/are attached. Return one (1) form only. If we receive more than one (1) form from you we may not be able to process the request. If you have received more than one (1) form, you can use the information below, to decide which form is right for your case. **Please Note:** Once the satisfaction is filed in circuit court, the judgment or amount indicated will show permanently in the court's records as paid, and cannot be changed, except by a court in limited situations.

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# OCTOBER RELEASE NOTES

## Verification of Commission

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
New	Western Title	N/A	414510	ORD1457.doc

New document. Render to view complete document. This document will prompt for which contact(s) and renders the appropriate version.

**Document Selection**

Please make one or more selections for each document below.

Check

**Verification of Commission**

Listing Agent/Broker The Listing Agency (LB)

Listing Agent/Broker The Selling Agency (LB2)

Selling Agent/Broker The Selling Agency (SB)



Company Name

VERIFICATION OF INFORMATION  
LISTING AGENT

**Date:** September 29, 2017  
**Escrow No.:** JM CD Test-MGS  
**Escrow Officer:** Melissa G. Smith  
**Sales Price:** \$175,000.00  
**Seller Name:** Sam E. Seller and Sally A. Seller  
**Buyer Name:** Bob L. Buyer and Betty A. Buyer  
**Listing Broker:** Re/Max Sunquest  
**Selling Broker:** The Selling Agency  
**Property:** 1001 Property Address, City, OR 49503

**Seller Concessions:** \_\_\_\_\_



Company Name

VERIFICATION OF INFORMATION  
SELLING AGENT

**Date:** September 29, 2017  
**Escrow No.:** JM CD Test-MGS  
**Escrow Officer:** Melissa G. Smith  
**Sales Price:** \$175,000.00  
**Seller Name:** Sam E. Seller and Sally A. Seller  
**Buyer Name:** Bob L. Buyer and Betty A. Buyer  
**Listing Broker:** Re/Max Sunquest  
**Selling Broker:** The Selling Agency  
**Property:** 1001 Property Address, City, OR 49503

**Commission due to the undersigned Selling Realtor is:** \_\_\_\_\_

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# OCTOBER RELEASE NOTES

## Title

### Combination Form Guarantee

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	Western Title	N/A	411634	G17S_TrustSa_AZ_xx_FNF

If 'Leasehold Interest' is selected from the drop-down field on the Guarantee screen, the user will be prompted to enter the leasehold estate or interest when the doc is rendered.

Select type of estate or interest in the land which is covered by this Guarantee:

The screenshot shows the software interface for generating a document. A dropdown menu is open, showing three options: 'Fee Interest', 'Leasehold Interest' (highlighted in yellow), and 'Vendee's Interest'. A 'Field Prompt' dialog box is overlaid on the document preview. The dialog box title is 'Field Prompt' and it contains the text 'Master Guarantee (OR)' and 'Loan Policy (\$400,000.00)'. Below this, it says 'Enter leasehold estate or interest' and there is a text input field containing 'FILL IN'. At the bottom of the dialog box, there is a checkbox labeled 'Skip remaining prompts' and an 'OK' button. The document preview in the background shows the following text:

**FIDELITY NATIONAL TITLE**

Effective Date  
October 18, 2017 at 10:00

A. The Assured is:  
Leonard's Lending Services

B. The encumbrance to be encumbered is:  
FILL IN

C. The estate or interest in the land which is covered by this Guarantee is:  
FILL IN

D. Title to the estate or interest in the land is vested, as of the effective date, in:  
This is the Loan Pol Title Vesting

E. The Land referred to in this Guarantee is described as follows:  
SEE EXHIBIT "A" ATTACHED HERETO AND MADE A PART HEREOF

F. As of the effective date, the land covered by this Guarantee is subject to the following Exceptions:

(If 'Fee Interest' or 'Vendee's Interest' is selected from the drop-down, the document will still print "A fee" or "A vendee's interest in the contract referenced in Paragraph B above," respectively.)

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# OCTOBER RELEASE NOTES

## REPORTS

<b>Invoice Exceptions</b>				
<b>NEW/MOD MOD</b>	<b>REQUESTED BY</b>	<b>FOOTPRINTS No(s).</b>	<b>TFS No(s).</b> 415506	<b>FILE NAME (NEW ITEMS ONLY)</b>
If Profile State = WA, OR, HI, ID, MT				
<ul style="list-style-type: none"><li>• New Exception: 'Un-Invoiced Title Only'<ul style="list-style-type: none"><li>○ Note: This is distinct from the existing Un-invoiced TO Order (distributed task) exception.</li><li>○ Logic: Order type = Title only and no sent invoices in the order</li><li>○ Suppressed 'Un-invoiced TO Order (distributed task) exception' for the same states above</li></ul></li></ul>				

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# OCTOBER RELEASE NOTES

## MY SCREENS

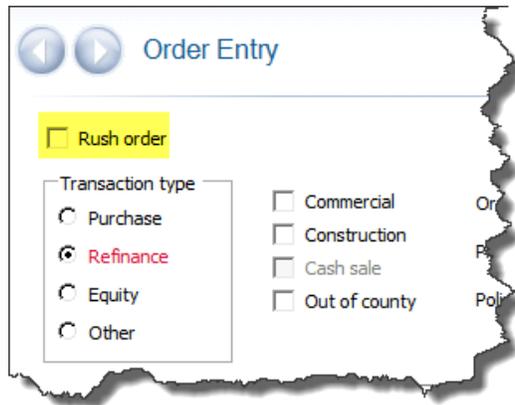
### Escrow

#### Order Entry

NEW/MOD Mod	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s). 349311
----------------	--------------	-------------------	----------------------

Added the 'Rush Order' checkbox (aka Order.IsRush) to *the very top* of the Order Entry screen (in the Open Order/General category) in the following screen sets:

OR All Screens  
OR Title Screens



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# OCTOBER RELEASE NOTES

## TEXAS

### DOCUMENTS

#### Escrow

##### Affidavit (T-47)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	LT and CT Amarillo	N/A	414365	

Revised document to show all buyer and seller names and addresses.

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##### Affidavit (Appraiser(s) and or Broker(s))

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	CT San Antonio	N/A	417050	

Revised functionality to allow users to pick between multiple properties.

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

Check -  
 Property 1  
 Property 2

### AFFIDAVIT OF APPRAISER(S) AND OR BROKER(S)

Date: October 11, 2017  
 GF#: SA1-JM CD Test  
 Seller/Lessor: Sam E. Seller, Sally A. Seller, and Susan A. Seller  
 Purchaser/Lessee: Bob L. Buyer and Betty A. Buyer  
 Affiant: \_\_\_\_\_  
 Property: 1 Property Address, San Antonio, TX 49503  
2 Property Address, San Antonio, TX 45784

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# OCTOBER RELEASE NOTES

## Affiliated Business Arrangement Disclosure Statement

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	West Texas Abstract	N/A	414398	

Changed fee per parcel from \$27.06 to \$27.00.

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## Certification of Durable Power of Attorney

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	Regional Counsel	N/A	416015	

Document has been updated to match the most recent version provided by State Counsel.

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## Order Exceptions

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
MOD	CT TX		413743	

- When Profile = Default\P\TX\South Texas CPF\SAN ANTONIO-CPF\CT + child prfiles report will the following exception
  - *Escrow Officer/Closer on Title Only order; remove Escrow Officer or change Order Type*

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# OCTOBER RELEASE NOTES

## Request for Absentee Notary Signup

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	LT and CT Amarillo	N/A	414362	

Added a prompt for "Check here if using Bancserv".

**Field Prompt**

**Request for Absentee Notary Signup**  
Buyer/Borrower Brian T. Buyer and Brenda T. Buyer (B)

---

Buyer/Borrower Brian T. Buyer and Brenda T. Buyer (B)

Check here if using Bancserv

The absentee notary is being provided at the request of the undersigned party and by the signing below that party agrees to pay for the services rendered.

---

Check here if using Bancserv

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## Request For Legal Papers

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	LT and CT Amarillo	N/A	414359	

Revised to remove the prompts.

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# OCTOBER RELEASE NOTES

## WASHINGTON

### DOCUMENTS

#### Escrow

**Statutory Warranty Deed (LPB 10)**

**Statutory Warranty Deed (LPB 10) (Letter)**

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	CT Kennewick	N/A	417260	

Revised functionality that keeps certain parts of the document together so that users can more easily edit the document to keep signatures and notary section to one page when needed.

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# OCTOBER RELEASE NOTES

## REPORTS

Invoice Exceptions				
NEW/MOD MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s). 415506	FILE NAME (NEW ITEMS ONLY)
If Profile State = WA, OR, HI, ID, MT <ul style="list-style-type: none"> <li>New Exception: 'Un-Invoiced Title Only'               <ul style="list-style-type: none"> <li>Note: This is distinct from the existing Un-invoiced TO Order (distributed task) exception.</li> <li>Logic: Order type = Title only and no sent invoices in the order</li> <li>Suppressed 'Un-invoiced TO Order (distributed task) exception' for the same states above</li> </ul> </li> </ul>				

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Order Exceptions				
NEW/MOD MOD	REQUESTED BY WA	FOOTPRINTS No(s).	TFS No(s). 412967	FILE NAME (NEW ITEMS ONLY)
<ul style="list-style-type: none"> <li>Added in new row under order number to show the following:               <ul style="list-style-type: none"> <li>Transaction type</li> <li>Order Type</li> <li>Product Type</li> </ul> </li> </ul> <p>EX: "Trans. Type: Purchase      Order Type: TE      Prod. Type: Resi. Sale/Re-Sale"</p> <ul style="list-style-type: none"> <li>Added "Missing lookup code on policy" to the closed order exceptions and apply same logic as this exception on the opened orders.</li> <li>Applied the following additional logic: <i>"Excludes Product Type of Uninsured, Wild Recording, Customer Service, Search Package, Lot Book Report, Chain of Title orders or Customer Service"</i></li> </ul>				

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# OCTOBER RELEASE NOTES

## MY SCREENS

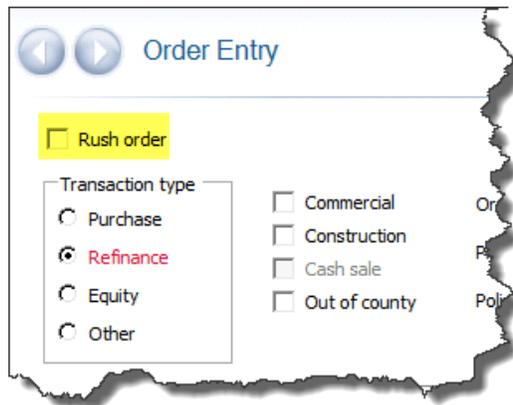
### Escrow

#### Order Entry

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).
Mod			349311

Added the 'Rush Order' checkbox (aka Order.IsRush) to *the very top* of the Order Entry screen (in the Open Order/General category) in the following screen sets:

- Washington Commercial Screens
- Washington Payoff Screens
- Washington Screen List
- Washington Title Screens



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# OCTOBER RELEASE NOTES

## LOOKUP TABLES

### Escrow Instruction Phrases

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).
Mod	Ticor	N/A	413974

New phrase added:

Code	Name
credit03	CREDIT CARD PAYMENTS

**CREDIT CARD PAYMENTS:** As a condition of funding, the new lender requires certain credit card and installment accounts be paid through escrow. [If Purchase 'Buyer' else '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 \$[PROMPT (Enter the credit card payment fee)] fee will be charged for each disbursement of an unsecured credit payoff. [If Purchase 'Buyer' else 'Borrower'] understands the payments will be sent via regular first class mail.

[Pulls 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. [If Purchase 'Buyer' else 'Borrower'] will hold [Pulls Escrow Office Name] harmless and indemnify such against any losses or damages by reason of compliance with these instructions.

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### Escrow Instruction Phrases

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).
Mod	CT-Everett	N/A	416341

New phrase added:

Code	Name
tax10	BUYERS PAYMENT OF TAXES - NO CHANGE NOTICE

**BUYERS PAYMENT OF TAXES DUE:** The Buyers herein will be responsible for payment of real estate taxes which will become due and payable on or before **November 30, 2017**.

Taxes due and payable on or before  
11/30/2017

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# OCTOBER RELEASE NOTES

## WISCONSIN

### DOCUMENTS

#### Escrow

#### Affidavit (Judgment Lien)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	CT WI	N/A	413729	

Revised to pick from Requirements on Schedule B.

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

Check ▾

RX22

RXD

RX27

J2

---

**LIST OF JUDGMENTS AND/OR LIENS REFERRED TO IN THE FOREGOING AFFIDAVIT:**

1. A judgment, for the amount, \$7,500.00, and any other amounts due, Debtor Name, debtor, Creditor Name, creditor, docketed September 4, 2015, at Orange County, in Circuit Court, Case No. 12345.

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# OCTOBER RELEASE NOTES

## El - Disbursement

### El - Disbursement (Legal)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	Dane County Title	N/A	415928	

\*\*This only affects orders where the EO name contains "Dane County"

Added "(a \$25.00 wire charge may be deducted from the funds)" and "(attach DEPOSIT TICKET)".

NET PROCEEDS DUE THE UNDERSIGNED to be:	<input type="checkbox"/> Wire Transfer (complete instructions below) (a \$25.00 wire charge may be deducted from the funds)
Disbursed as indicated:	<input type="checkbox"/> HOLD for Pick Up <input type="checkbox"/> Overnight Delivery (The actual charge for this service may be deducted from the funds)
<input type="checkbox"/> CALL when check is ready for Pick Up, Phone No. _____	
<input type="checkbox"/> Deposit in Local Bank (attach DEPOSIT TICKET)	
<input type="checkbox"/> Mail: (Complete Forwarding Mailing Address on next page)	

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### Special Assessment Form (Generic)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	Dane County Title	N/A	415291	

Revised to pull Title Company when the file is "Title Only".

<b>CERTIFICATION AS TO SPECIAL ASSESSMENTS</b>
(PLEASE COMPLETE AND RETURN AS SOON AS POSSIBLE TO: Title Office Name)
Order No.: JM CD Test <del>JDK</del>
WHEN COMPLETED RETURN TO: TitleOffice@email.com or fax to: (888)333-4444 Title Office Name 1 Title Office Street City, WI 70808 Closing Date: October 6, 2017

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# OCTOBER RELEASE NOTES

## Title

- ALTA 18.2-06 - Multiple Tax Parcel
- ALTA 19.2-06 - Contiguity - Specified Parcels
- ALTA 46-06 - Option

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
New	Underwriting	N/A	417606	E16A018_02_FNF, E15A019_02_FNF, E15A046_00_FNF

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

**ENDORSEMENT - ALTA 18.2-06**

Issued By:



CHICAGO TITLE INSURANCE COMPANY

Charge: \$0.00

The Company insures against loss or damage sustained by the Insured by reason of those portions of the Land identified below not being assessed for real estate taxes under the listed Tax Identification Numbers or those Tax Identification Numbers including any additional land:

Parcel:	Tax Identification Numbers:
FILL IN	FILL IN

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:

Countersigned By:

\_\_\_\_\_

Authorized Officer or Agent

**MULTIPLE TAX PARCEL**

Attached to Owner's Policy Number:

**X2013100007 - CP Test WI**

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# OCTOBER RELEASE NOTES

## REPORTS

### Order Exceptions

NEW/MOD MOD	REQUESTED BY WI	FOOTPRINTS No(s).	TFS No(s). 412967	FILE NAME (NEW ITEMS ONLY)
<ul style="list-style-type: none"> <li>• Added in new row under order number to show the following:               <ul style="list-style-type: none"> <li>○ Transaction type</li> <li>○ Order Type</li> <li>○ Product Type</li> </ul> </li> </ul> <p>EX: "Trans. Type: Purchase      Order Type: TE      Prod. Type: Resi. Sale/Re-Sale"</p> <p>When profile state = WI and Product Type is = 'Letter Report', 'Search Only' or 'UCC' do not apply the following exceptions</p> <ul style="list-style-type: none"> <li>• Open Order Exceptions:               <ul style="list-style-type: none"> <li>○ 'Missing marketing source checkbox'</li> <li>○ 'Missing lookup code on policy'</li> <li>○ 'Missing transaction code on policy'</li> <li>○ 'Missing Reference# on Escrow Company contact'</li> <li>○ 'Missing sales rep(s)'</li> <li>○ 'Missing sales rep(s) on the marketing source contact'</li> </ul> </li> <li>• Closed Order Exceptions:               <ul style="list-style-type: none"> <li>○ 'Missing Buyer Forwarding Address (TO orders excluded)'</li> <li>○ 'Missing Seller Forwarding Address (TO orders excluded)'</li> <li>○ 'Ledger Transfer/Sent Invoice occurred and escrow status is not Closed'</li> <li>○ 'Missing Policy Coverage - Closed orders with "Coverage TBD" not checked on      Owners/Loan Policy with no coverage amount'</li> <li>○ 'Missing Settlement Date includes orders without a settlement date entered and have at least one posted revenue transaction'</li> <li>○ 'Order funded with order status not closed/completed include orders that have "Order.Loans[1].FundingDate_FNF#" entered with the order status not closed or completed'</li> </ul> </li> <li>• Closed Order Exception Update               <ul style="list-style-type: none"> <li>○ Closed Order, Missing/Pending Revenue includes</li> </ul> </li> <li>• Added WI as part of the group of states with orders and 'Branch' in the special instructions</li> </ul>				

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# OCTOBER 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.

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