

# SOFTPRO SELECT

## RELEASE NOTES



DECEMBER, 2018

Testing Release Date: December 6, 2018

Production Release Date: December 21, 2018



# DECEMBER RELEASE NOTES

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# DECEMBER RELEASE NOTES

## ALL STATES/SITES

### DOCUMENTS

#### Escrow

##### CDF Forms

NEW/MOD MOD	REQUESTED BY WA	FOOTPRINTS No(s).	TFS No(s). 505827	FILE NAME (NEW ITEMS ONLY)
<ul style="list-style-type: none"> <li>• If more than one buyer/borrower exists in the order "Print Signatures on Attachment page" checkbox will default as checked               <ul style="list-style-type: none"> <li>○ SSCORPD5466.rpt - Closing Disclosure Form (CDF): if more than one buyer/borrower exists in the order default checkbox "Print Signatures on Attachment page" as checked.</li> <li>○ SSCORPD5467.rpt - Borrower Closing Disclosure Form (CDF)</li> <li>○ SSCORPD5468.rpt - Buyer Closing Disclosure Form (CDF)</li> </ul> </li> <li>• If more than one seller exists in the order default print seller signature drop down to "Attachment"               <ul style="list-style-type: none"> <li>○ SSCORPD5469.rpt - Seller Closing Disclosure Form (CDF)</li> </ul> </li> </ul>				

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##### Corporate/Consolidated Invoice

NEW/MOD MOD	REQUESTED BY NCS DC	FOOTPRINTS No(s).	TFS No(s). 501617	FILE NAME (NEW ITEMS ONLY)
<ul style="list-style-type: none"> <li>• Invoice will use "InvoiceCustomTitle_FNF#" to change the title on the invoice.               <ul style="list-style-type: none"> <li>○ Prompt - only prompt for this value when the custom field is populated</li> <li>○ When entered Invoice will print the value entered in the custom field</li> <li>○ "INVOICE" will still be printed if not used.</li> </ul> </li> </ul>				

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##### CSS Statements

NEW/MOD MOD	REQUESTED BY TX	FOOTPRINTS No(s).	TFS No(s). 501018	FILE NAME (NEW ITEMS ONLY)
<ul style="list-style-type: none"> <li>• Added new logic that if the section name has "TBD" in the title all charges in that section will show as TBD on the statement where the line item has a value (actual charge or user entered 0.00)</li> <li>• Property label override – use the <a href="#">SSHeader_PropertyLabel_FNF#</a> custom field (order context) to change the property label in the header. Use the field if populated. Same as HUD/CDF version</li> </ul>				

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# DECEMBER RELEASE NOTES

<b>CSS Statements</b>				
NEW/MOD MOD	REQUESTED BY TX	FOOTPRINTS No(s).	TFS No(s). 501018	FILE NAME (NEW ITEMS ONLY)
<ul style="list-style-type: none"> <li>Added new logic that if the section name has "TBD" in the title all charges in that section will show as TBD on the statement where the line item has a value (actual charge or user entered 0.00)</li> <li>Property label override – use the <a href="#">SSHeader_PropertyLabel_FNF#</a> custom field (order context) to change the property label in the header. Use the field if populated. Same as HUD/CDF version</li> </ul>				

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<b>EI - Third Party Deposit</b> <b>EI - Third Party Deposit (Legal)</b> <b>EI - Third Party Deposit - Multiple Parties</b> <b>EI - Third Party Deposit - Multiple Parties (Legal)</b>				
NEW/MOD Mod	REQUESTED BY FT Alameda - Contra Costa	FOOTPRINTS No(s).	TFS No(s). 503800	FILE NAME (NEW ITEMS ONLY)
<p>Revised to show address and phone number in the signature section (for Buyers only).</p> <p><u>Also affects like named documents without the hyphen in the title:</u>            EI Third Party Deposit            EI Third Party Deposit (Legal)            EI Third Party Deposit - Multiple Parties            EI Third Party Deposit - Multiple Parties (Legal)</p>				

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<b>Settlement Statements</b>				
NEW/MOD MOD	REQUESTED BY CORP	FOOTPRINTS No(s).	TFS No(s). 504073	FILE NAME (NEW ITEMS ONLY)
<p>HTML Settlement Statements</p> <ul style="list-style-type: none"> <li>Added a new custom field drop down that will be used to default the paper size. Default on drop down will be letter as that is the current default on the all statements.</li> <li>Each office will be able to set their paper size in the template.               <ul style="list-style-type: none"> <li>Initial default/CF is blank or not templated</li> <li>CSS - initial default is Letter</li> <li>HUD/CDF - initial default is Legal</li> </ul> </li> <li>Custom field name {{Order.SSPaperSize_FNF#}}</li> </ul>				

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<b>Information Collection Form</b>				
NEW/MOD Mod	REQUESTED BY Settlement	FOOTPRINTS No(s).	TFS No(s). 503794	FILE NAME (NEW ITEMS ONLY)
<p>Various updates per Settlement's directive. Revised to match the version provided in Escrow Technical Memorandum #172-2016.</p>				



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## Open Order Sheet (Sales)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	CT Portland		503413	

Added the phone number for the 'Corporate Officer/Signees' for buyer/borrower and seller contacts.

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## Outgoing Wire List

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
MOD	NCS IL		503775	

- Updated date from using ChangedOn (trust date) to UserPostedOn (transaction date)
- If profile path contains '%\NCS\Chicago%', then report will suppress the date column on the document.

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# DECEMBER RELEASE NOTES

## REPORTS

### 1099-S Exceptions

NEW/MOD MOD	REQUESTED BY GA NCS	FOOTPRINTS No(s).	TFS No(s). 503767	FILE NAME (NEW ITEMS ONLY)
<ul style="list-style-type: none"> <li>Updated parameter screen to use a from and through date in place of the year.               <ul style="list-style-type: none"> <li>from date default = 1st day of current year</li> <li>to date default = current date</li> </ul> </li> </ul>				

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### Automation Exceptions

NEW/MOD NEW	REQUESTED BY CORP	FOOTPRINTS No(s).	TFS No(s). 501211	FILE NAME (NEW ITEMS ONLY) SSCORP5379.rpt – Automation Exceptions
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**General:**

Title – Automation Exceptions

Tree location – Exception Reports

**Parameters:**

- date from
  - default to 1<sup>st</sup> day of current month
- date through
  - default to prior business day
- Group by drop down
  - Branch, Escrow Officer (default)
  - Branch, Title Officer
  - Branch, Received by
- Branch picklist
- Show report programming notes
- Report comments

**Groups:**

- Based on drop down above

**Columns:**

- Order Number
- Automation Process
  - Name of the process
- Exception Reason
  - Use the description column found in the Core.AutomationLog table. This is the same description that is displayed on the order history.

**Totals:**

- Exception totals per group and report

**Sorting:**

- Alphabetically by groups, then order number

**Logic:**

- Look for all orders with an automation process run during the date range.
- Return all order where one or more automation processes exceptions are found and the process was not later completed
- Return each exception as a separate row.

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# DECEMBER RELEASE NOTES

Closed Orders by Revenue Operation				
NEW/MOD MOD	REQUESTED BY NCS WA	FOOTPRINTS No(s).	TFS No(s). 501484	FILE NAME (NEW ITEMS ONLY)
<ul style="list-style-type: none"> <li>• For each group total number of closed orders will be shown after the name of each group</li> <li>• Added a new option to group by drop down "Branch, Title Officer"</li> <li>• Added a new checkbox parameter called "Commercial Format:" and defaulted to unchecked unless profile path contains "%\NCS\' then defaulted to checked. Placed between "Include sales rep on marketing source only" checkbox and commercial/residential filter drop down.               <ul style="list-style-type: none"> <li>○ When commercial checkbox is checked do the following:                   <ul style="list-style-type: none"> <li>▪ Include CRRAR Rev field {{Order.CRRARRev_FNF#}}in Title Revenue Column (add note to footer it is included)</li> <li>▪ Columns to display:                       <ul style="list-style-type: none"> <li>• Order Number</li> <li>• Trans. Type {{Order.TransactionType}}</li> <li>• Order Type {{Order.Type}}</li> <li>• Prod. Type {{Order.ProductType}}</li> <li>• Prop. Type {{Order.Properties.Use}} (concatenant if more than one, comma seperated)</li> <li>• Prop. State {{Order.Properties.Address.State}} (concatenant if more than one, comma separated)</li> <li>• Closed Date</li> <li>• Sales Rep</li> <li>• Marketing Source Co.</li> <li>• Main Contact (main contact of marketing source)</li> <li>• Title Rev.</li> <li>• Escrow Rev.</li> <li>• Other Rev.</li> <li>• Referral Rev.</li> <li>• Total Rev.</li> </ul> </li> </ul> </li> </ul> </li> </ul>				

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Commitment/Policy Status				
NEW/MOD NEW	REQUESTED BY CT CA	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY) SSCORP5378.rpt - Commitment/Policy Status
<p><b>General:</b>            Title – Commitment/Policy Status            Tree location – Title Reports</p> <p><b>Parameters:</b></p> <ul style="list-style-type: none"> <li>• Report Type drop down               <ul style="list-style-type: none"> <li>○ Opened (default)</li> <li>○ Closed</li> <li>○ Opened and Closed</li> </ul> </li> <li>• date from               <ul style="list-style-type: none"> <li>○ default to 1<sup>st</sup> day of current month</li> </ul> </li> <li>• date through               <ul style="list-style-type: none"> <li>○ default to prior business day</li> </ul> </li> <li>• Commitment/Policy Type drop down               <ul style="list-style-type: none"> <li>○ Commitment (default)</li> </ul> </li> </ul>				



# DECEMBER RELEASE NOTES

- When selected report will search for commitments
  - Policy
    - When selected report will search for policies
- Commitment/Policy Status drop down
  - Outstanding (default)
    - Looks for commitment/policy where the date selected below is NULL
  - Completed
    - Looks for commitment/policy where the date selected below has a value
- Status Date drop down - Search the order to find any commitment or policy (based commitment/policy drop down) where date is NULL or Completed (based on Commitment/Policy Status drop down)
  - Issued Date
    - {{ Order.Title.TitleProducts.IssueDate}} OR  
{{Order.Title.TitleInsuranceCalculations.LoanPolicy.IssueDate}} &  
{{Order.Title.TitleInsuranceCalculations.OwnersPolicy.IssueDate}}
  - Effective Date (default)
    - {{Order.Title.TitleProducts.EffectiveDate}} OR  
{{Order.Title.TitleInsuranceCalculations.LoanPolicy.EffectiveDate}} &  
{{Order.Title.TitleInsuranceCalculations.OwnersPolicy.EffectiveDate}}
  - Completed Date
    - {{ Order.Title.TitleProducts.CompletedDate}} OR  
{{Order.Title.TitleInsuranceCalculations.LoanPolicy.CompletedDate}} &  
{{Order.Title.TitleInsuranceCalculations.OwnersPolicy.CompletedDate}}
- Group by 1 drop down
  - Branch (default)
  - Escrow Officer
  - Title Officer
  - Sales Rep
  - None
- Group by 2 drop down
  - None
  - Title Officer (default)
  - Escrow Officer
  - Sales Rep
  - Marketing Source Company
- Excel Export checked box, default to unchecked
- Branch Picklist
- Escrow Officer Picklist
- Title Officer Picklist
- Show report programming notes
- Report comments

## Groups:

- Based on drop down above

## Columns:

- Order Number
- Received Date
- Settlement Date
- Commitment or Policy {Status} Date
  - Show the title based on selections in Commitment/Policy Type and Status Date drop down's
  - EG: Commitment Effective Date or Commitment Issued Date or Commitment Completed Date and same with policy
- Commitment Number or Policy Number
  - Based on Commitment/Policy Type drop down selection
  - EG: Commitment Number if Commitment is selected in Commitment/Policy Type drop Title Officedown



# DECEMBER RELEASE NOTES

- Title Office
  - If profile path contains '%\NCS%', then show Name, Lookup code, City and State of contact selected as title office {{Order.Title.Office}}, else show as Name and Lookup code
    - EG NCS: Chicago Title (CTR500) Raleigh, NC
    - EG All Others: Chicago Title (CTR500)
- Title Officer
  - {{Order.Title.Officer.FullName}}
- Buyer
  - Show all buyers, {{Order.BuyerData.NamesWithAnd}}
- Seller
  - Show all sellers, {{Order.SellerData.NamesWithAnd}}
- Property Address
  - Show all property addresses, {{Order.Properties.Address.FullAddress}}, associated with the commitment or policy
  - On excel export split this into separate columns as {{.Address1Address2}}, {{.City}}, {{.State}}, {{.Zip}}
- Property County
  - Show county of all property addresses, {{Order.Properties.Address.County}}, of the property address associated with the commitment or policy
- Property Type/Use
  - If profile path contains '%\NCS%', then return {{Order.Properties.Use}}, else show {{Order.Properties.Type}}

**Totals:**

- Per group
  - Order count – unique count of orders
  - Product Count – number of commitments or polices returned.
    - Note: this county might be higher than order numbers if an order has more than 1 commitment or policy being returned on the report

**Sorting:**

- Alphabetically by group(s)
- Order Number

**Logic:**

- Return all orders in the date range that are opened and/or closed, **AND**
- Has commitment **OR** policy that **IS** or **IS NOT** completed based the date (issue, effective, or completed) selected within the orders returned
- Show each commitment or policy in the order as a separate row
- Report will exclude orders where the order status {{Order.Status}} = 'Duplicate'

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## Construction Disbursement Exceptions

NEW/MOD MOD	REQUESTED BY CORP	FOOTPRINTS No(s).	TFS No(s). 504983	FILE NAME (NEW ITEMS ONLY)
<ul style="list-style-type: none"> <li>• Bug found in Select where users can self-approve a draw if a revenue contact is present.               <ul style="list-style-type: none"> <li>◦ Added new exception called "Self Approved Draw" if the user who approved the draw is also listed as a user who created or edited the draw.</li> </ul> </li> </ul>				

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## CRRAR Revenue Amount

NEW/MOD MOD	REQUESTED BY NCS Pitt	FOOTPRINTS No(s).	TFS No(s). 504130	FILE NAME (NEW ITEMS ONLY)
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# DECEMBER RELEASE NOTES

- Added Branch Picklist to parameter screen. Inserted under the format details for excel export checkbox.

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## Escrow Closing Log

NEW/MOD MOD	REQUESTED BY NCS FT DC	FOOTPRINTS No(s).	TFS No(s). 504352	FILE NAME (NEW ITEMS ONLY)
<ul style="list-style-type: none"> <li>Added a new checkbox called "Commercial Format:" and inserted a format for excel export checkbox. defaulted to unchecked unless profile path contains '%\NCS\%' then default to checked</li> <li>When new commercial format box is checked display the following columns               <ul style="list-style-type: none"> <li>Order Number</li> <li>Sales Rep</li> <li>Marketing Source (currently called primary source)</li> <li>Seller/Buyer</li> <li>Property State - state of property 1</li> <li>OP Liability (sum of all owners policy coverage amount. if blank use sales price)</li> <li>LP Liability (sum of all lenders policy coverage amount. if blank use sum of loan amounts)</li> <li>Title Premium (currently called Total Premiums) - sum of all TP bill code + CRRAR Rev field</li> <li>Endorsement Premium (currently called Endorsement Fees) - sum of all END bill codes</li> <li>Escrow Fees - sum of ESC bill code</li> <li>Search &amp; Exam Fees - sum of SEA and SEA2 bill codes</li> <li>Total Fees - sum title premium, endorsement premium, escrow fees, and search &amp; exam fees</li> <li>Rev. Share - (currently called processing to others) sum of NBI &amp; NBE bill codes</li> <li>Net Income = Total Fees + Rev Share Income/expense</li> </ul> </li> </ul>				

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## In Process/Pipeline Orders

NEW/MOD MOD	REQUESTED BY NCS	FOOTPRINTS No(s).	TFS No(s). 504996	FILE NAME (NEW ITEMS ONLY)
<ul style="list-style-type: none"> <li>On the commercial format option layout added a new column (also show on excel export as well) called " Prop. Type" and pulls in the property use from property 1 {{Order.Properties [1].Use}}, placed between Trans type and order type columns</li> </ul>				

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## NCS Orders by Commission

NEW/MOD MOD	REQUESTED BY CW NCS TX	FOOTPRINTS No(s).	TFS No(s). 503944	FILE NAME (NEW ITEMS ONLY)
<ul style="list-style-type: none"> <li>If Profile path contains '%\NCS\TEXAS\DALLAS CPF\CLT%', then the 'NBE' bill code will show in other revenue column and use this in the sum for total.</li> </ul>				

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## Open/Closed Orders by Selection

NEW/MOD MOD	REQUESTED BY FT CA	FOOTPRINTS No(s).	TFS No(s). 504806	FILE NAME (NEW ITEMS ONLY)
<ul style="list-style-type: none"> <li>On parameter screen if commercial format = true, then on report added a new column called Prop. This new column will use and pull the property use of property 1 {{Order.Properties[1].Use}}               <ul style="list-style-type: none"> <li>On opened report show between prop state and open date</li> </ul> </li> </ul>				



# DECEMBER RELEASE NOTES

- On closed report show between prop state and closed date
- On the non-commercial format the report pulls liability to show the greater of owners or lenders. update this to pull the following
  - If owners liability is NULL, pull sales price
  - If lenders liability is NULL, pull sum of loan amounts
  - Logic will still retain the logic to only show the greater of the two.

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## Open/Closed Pipeline Commercial

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
NEW	NCS			SSCORP5382.rpt - Opened/Closed Pipeline Commercial

**General:**

New report based on SSCORP5347.rpt - Open/Closed Pipeline

Title – Opened/Closed Pipeline Commercial

Tree location – Order Reports folder in Commercial Tree

**Changes/Updates:**

- Parameter Screen Changes:
  - Remove commercial format checkbox
  - Note this will only have one format
  - Remove Liability Amounts dropdown
  - Report will only show
  - Remove Premium only checkbox
  - Report will show premium rev as a separate column
  - Group 1 drop down:
  - Default to escrow officer
  - Add title officer as an option in the drop down
- Columns removed:
  - Escrow Office
  - Title Office
  - Total Liability (see below where OP and LP will be separate columns)
  - Title Premium (see below where title and end premium will be one column)
  - End. Premium (see below where title and end premium will be one column)
- Columns added:
  - Marketing Source – pull in the name of the marketing source and show after escrow officer
  - Sales Rep – name of sales rep listed on the order and show after new marketing source column
  - Prop. Use – show property use of property 1 and show after sales rep
  - OP Liability – show the sum of all owners’ policy coverage amounts. If coverage amount is blank, pull in the sales price amounts
  - LP Liability – show the sum of all lenders policy coverage amounts. If coverage amount is blank, pull in the sum of loan amounts
  - Gross Premium – sum of all TP and END in the order, plus any CRRAR Rev field amounts `{{Order.CRRARRev_FNF#}}`
  - Shared Rev Income/Expense – show all NBI and NBE bill codes
  - Net Premium – sum of gross and shared rev. income/expense columns
  - Non-Premium Rev – all other bill codes that with a GL code starting with a 4 and not TP or END (or CRRAR Rev Field)
  - Gross Revenue – sum of net premium and non-premium rev columns
- Excel export updates:
  - Added in the following columns after settlement
    - Transaction Type
    - Order Type
    - Product Type



# DECEMBER RELEASE NOTES

- Show address as separate columns for all part
  - Address1Address2
  - City
  - State
  - Zip

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## Outstanding Checks

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
MOD	FT MI		504789	
<ul style="list-style-type: none"> <li>• Added a new column called Settlement date and will show between escrow officer/closed and trust date. This column is populated with {{Order.SettlementDate}}.</li> </ul>				

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## SPAdmin Custom Source of Business

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
MOD	CORP		504951	
<ul style="list-style-type: none"> <li>• Updated report logic and programming notes to exclude all orders from the following profile:           <ul style="list-style-type: none"> <li>○ Default\PIIL\ CT CPU\EPU-CTIL\CT Chicago Metro\FSWL\5205 Carol Stream Home Equity</li> </ul> </li> </ul>				

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## SPAdmin User/Group Permissions

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
MOD	CORP		504403	
<ul style="list-style-type: none"> <li>• On the parameter screen added a new checkbox called "Include SoftPro groups/users:" and defaulted to checked. Placed new checkbox under "Exclude 'NotGranted' permission" checkbox           <ul style="list-style-type: none"> <li>○ When this new box is unselected exclude any users who are part of group where group name contains '%SoftproCorp%'</li> </ul> </li> <li>• On the parameter screen added a new checkbox called "Include FNFI groups/users:" and defaulted to checked. Placed new checkbox under new exclude SoftPro users checkbox.           <ul style="list-style-type: none"> <li>○ When this new box is unselected exclude any users who are part of group where group name contains '%FNFI%'</li> </ul> </li> <li>• On the parameter screen added a new checkbox called "Include Local IT groups/users:" and defaulted to checked. Placed new checkbox under new exclude FNFI users checkbox.</li> <li>• Under user/group added new picklist called "Exclude groups/users:"           <ul style="list-style-type: none"> <li>○ When selected exclude any users who are part of any group that is selected. this will work the same as it does on the SPAdmin Users report</li> </ul> </li> </ul>				

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## SPAdmin Users

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
MOD	CORP		504402	
<ul style="list-style-type: none"> <li>• On the parameter screen added a new checkbox called "Include SoftPro users:" and defaulted to checked. Placed new checkbox under "Include blank cost centers" checkbox.           <ul style="list-style-type: none"> <li>○ When this new box is unselected exclude any users who are part of group where group name contains '%SoftproCorp%'</li> </ul> </li> </ul>				



# DECEMBER RELEASE NOTES

- On the parameter screen added a new checkbox called "Include FNFI users:" and defaulted to checked. Placed new checkbox under new exclude SoftPro users checkbox.
  - When this new box is unselected exclude any users who are part of group where group name contains '%FNFI%'
- On the parameter screen added a new checkbox called "Include Local IT users:" and defaulted to checked. Placed new checkbox under new exclude FNFI users checkbox.
  - When this new box is unselected exclude any users who are part of group where group name contains '%Local IT%', '%Local\_IT%' or '%LocalIT%'
- Report will cascade the user/group picklist based in the include active options and new check box (1 - 3)

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# DECEMBER RELEASE NOTES

## CALIFORNIA

### DOCUMENTS

#### Escrow

##### 593 Forms

NEW/MOD Mod	REQUESTED BY Settlement	FOOTPRINTS No(s).	TFS No(s). 503446	FILE NAME (NEW ITEMS ONLY)
2019 versions of the 593s are now available.				

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##### Affidavit (Death of Beneficiary)

NEW/MOD Mod	REQUESTED BY CT SoCal	FOOTPRINTS No(s).	TFS No(s). 505490	FILE NAME (NEW ITEMS ONLY)
Modified to pull a Jurat instead of an acknowledgment.				

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##### Deeds

NEW/MOD Mod	REQUESTED BY CA	FOOTPRINTS No(s).	TFS No(s). 508007	FILE NAME (NEW ITEMS ONLY)
Revised to look to the on screen field for "Transfer exempt verbiage 2nd Deed" for the 2nd rendered deed.				

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##### Demand - Institutional w/ Authorization

NEW/MOD Mod	REQUESTED BY Settlement	FOOTPRINTS No(s).	TFS No(s). 507988	FILE NAME (NEW ITEMS ONLY)
Removed "We are scheduled to pay off this loan on: <date>".				

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##### MH Specific Power of Attorney POA

NEW/MOD Mod	REQUESTED BY Santa Clara FT FSBC	FOOTPRINTS No(s).	TFS No(s). 504254	FILE NAME (NEW ITEMS ONLY)
Updated title in tree and footer to read "MH Specific Power of Attorney POA Instruction".				

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# DECEMBER RELEASE NOTES

## Request for Partial Reconveyance (RECON/SUB)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	Settlement		505507	
<p>Revised the document's language to read "A Partial Reconveyance will be made only upon presentation to the trustee of the original note(s) and the Deed of Trust securing same, and upon presentation of the Request properly signed, together with Partial Reconveyance fee." which removed "for endorsement" from the language. Also, removed the following sentence, "The making of such partial reconveyance shall be endorsed by you upon said note(s) and Deed of Trust which are herewith presented to you for that purpose."</p>				

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# DECEMBER RELEASE NOTES

## COMMERCIAL

### DOCUMENTS

#### Escrow

##### Customer Invoice

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
MOD	NCS BOS		504303	
Hard coded account name of bank to shows as "Commonwealth Land Title" when owning profile path contains '%\NCS\Boston%%'				

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##### New Order Request - GL

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	Great Lakes NCS		503722	
*Great Lakes NCS only*				
Replaced <a href="mailto:Caitlin.jacopin@fnf.com">Caitlin.jacopin@fnf.com</a> with <a href="mailto:lisa.bennett@fnf.com">lisa.bennett@fnf.com</a> in the "Commitment Delivery To" section.				

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# DECEMBER RELEASE NOTES

## REPORTS

Order Exceptions				
NEW/MOD MOD	REQUESTED BY CNS	FOOTPRINTS No(s).	TFS No(s). 502264	FILE NAME (NEW ITEMS ONLY)
<ul style="list-style-type: none"> <li>• When profile path contains '%\NCS\%' report will suppress exception 'Missing Reference # on Escrow Company'</li> <li>• When profile path contains '%\NCS\%', then report will update exception "Missing Title Company" as follows               <ul style="list-style-type: none"> <li>○ If Order Type = Title only look at T2 contact, else look at T</li> </ul> </li> <li>• Added Escrow Assistant to group 1 drop down</li> <li>• Exception messages were updated as follows               <ul style="list-style-type: none"> <li>○ If profile path contains '%\NCS\%', then updated the following</li> <li>○ Do not show any of the following until order received date is greater than 60 days                   <ul style="list-style-type: none"> <li>▪ Missing borrower (refi orders) or missing buyer/seller (sale orders)</li> <li>▪ Incomplete borrower (refi orders) or buyer/seller (sale orders) address information</li> <li>▪ Missing Buyer/TBD Buyer</li> <li>▪ Added new exception: Orders opened in the date range where property use {{Order.Property.Use}} is missing, show as 'Missing Property Use'</li> <li>▪ Suppress: 'Escrow Offices/Closer on Title Only Order' and "Title Officer/Examiner on Escrow Only Order"</li> <li>▪ Added new exception: Opened in the date range, order type {{Order.Type}} is Escrow Only and T2 {{Order.TitleCompanies[1].Name}} is NULL, flag as exception "Missing Title Company (T2)"</li> </ul> </li> </ul> </li> </ul>				

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Order Mix Summary				
NEW/MOD MOD	REQUESTED BY NCS DC	FOOTPRINTS No(s).	TFS No(s). 498632	FILE NAME (NEW ITEMS ONLY)
<ul style="list-style-type: none"> <li>• NCS Only: If profiles path contains '%\NCS\%', then an additional summary 'Property Use' was added and will show the property use {{Order.Property.Use}} for the opened and closed counts. This was placed at the end of the report under the property state shown for NCS offices</li> <li>• For the MTD and YTD graphs drop-downs removed property county and property state from the list. With too many options the graphing is hard to read.</li> </ul>				

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Title Production				
NEW/MOD MOD	REQUESTED BY NCS IL	FOOTPRINTS No(s).	TFS No(s). 501339	FILE NAME (NEW ITEMS ONLY)
<ul style="list-style-type: none"> <li>• Added new turn time start for IL:               <ul style="list-style-type: none"> <li>○ Task Contains "Send to CPU"</li> <li>○ Searches for checklist task contains '%Send to CPU%'</li> </ul> </li> <li>• Added new turn time stop for IL:               <ul style="list-style-type: none"> <li>○ Task Contains "Ready for Exam"</li> <li>○ Searches for checklist task contains "%Ready for Exam%"</li> </ul> </li> <li>• Updated "Service Level Percent Days" parameter to include 7. Currently report goes up to 7.</li> </ul>				

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# DECEMBER RELEASE NOTES

## FLORIDA

### DOCUMENTS

#### Escrow

#### Authorization (Survey Order)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	Wollinka Wikle		505080	

Revised item 2 to read as follows:

Payment for the survey shall be collected at closing. In the event the proposed transaction does not close as scheduled, <Escrow Office Name>, is authorized to use the purchaser's deposited escrow funds to pay the cost of the survey. If escrow funds are not available or are insufficient, the undersigned shall be responsible for the payment of any amounts owed to the surveyor/survey company.

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# DECEMBER RELEASE NOTES

## ILLINOIS

### DOCUMENTS

#### Escrow

#### WireSafe Fraud Alert

NEW/MOD Mod	REQUESTED BY CT Metro IL	FOOTPRINTS No(s).	TFS No(s). 504456	FILE NAME (NEW ITEMS ONLY)
----------------	-----------------------------	-------------------	----------------------	----------------------------

Added the following to the BMO VAR for CT Metro:

- CMLZ-0261
- CMLZ-5061
- CMLZ-3061
- CMLP-1136
- CMLP-5136
- CMJW-1107
- CMJW-1207
- CMJW-5207
- CMRLP-0202
- CMRL-5202
- CMRO-1756
- CMRO-0756
- CMRO-5756

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# DECEMBER RELEASE NOTES

## INDIANA

### DOCUMENTS

#### Escrow

#### Letter (Purchase Tax Proration)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	CT Indy Metro		506720	

Added new paragraph as item 6:  
 In the event that the tax parcel which affects the land to be conveyed includes other land, <Escrow Office Name> may rely upon the prorated tax amount for the current year payable in the following year which has been agreed to by Seller and Buyer in order to determine the Tax Amounts.

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#### Notice of Tax Parcel Split

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
New	CT Indy Metro		506726	IND1307.doc

New document. Render to view complete document.

#### NOTICE OF TAX PARCEL SPLIT

**Order No.:** IN123  
**Property:** 100 Property Address, City, OK 12345

Title Office Name has issued a title commitment under the above referenced number. The legal description of the land to be insured is attached hereto as Exhibit "A" ("Land"). The Land is affected by a tax parcel that includes more land than is being conveyed to the proposed purchaser. In order to prorate the tax obligations of the seller and purchaser, Title Office Name must be furnished an amount agreed upon by the seller and purchaser of the Land, in writing, in order to reflect the amount of prorated taxes for the year 2018, due and payable in 2019 in the settlement statement. Such agreed amount should be furnished to Title Office Name no later than five (5) business days prior to the scheduled closing. In the event that the actual tax amount varies from the amount provided, no adjustments will be made subsequent to the Closing Date nor will Title Office Name have any liability to the Buyer or Seller.

The best resource is to contact the county assessor the property is located in, or you can use the below link to Department of Government and Local Finance.

<https://www.in.gov/dlgf/4932.htm> (Tax Bill Calculator)

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# DECEMBER RELEASE NOTES

## MICHIGAN

### DOCUMENTS

#### Escrow

##### Record Title Search (CT)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	CT MI		508105	
Revised to pull the location from the TownCityTitle and TownCity.				

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##### Tax Proration

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	CT MI		505488	
Updated per diem date range to always show 01/01/current year - Settlement Date.				

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# DECEMBER RELEASE NOTES

## Title

### SE 446-06 - Construction Draw

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	FT MI Commercial	n/a	505311, 505312	

As directed by state counsel, the "Dated:" date for this endorsement is now labeled "Date issued:" and pulls in the Issued date from the Endorsements screen rather than the Effective date.

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# DECEMBER RELEASE NOTES

## MISSOURI

### DOCUMENTS

#### Escrow

#### Non-Imputation Questionnaire

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
New	CT Kansas City		505511	MOD1187.doc

New document. Render to view complete document.

#### NON-IMPUTATION QUESTIONNAIRE

1. What is the structure of the transaction?
2. Are we using our standard form of affidavit/indemnity?
3. What is the property used for?
4. Any reps and warranties in the PSA (especially limited)?
5. How long has the seller owned?

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# DECEMBER RELEASE NOTES

## Policy Date Down - Title Information

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
New	CT Kansas City		506702	MOD1188.doc

New document. Render to view complete document. This new document replaces the Date Down Form.



Company Name

POLICY DATE DOWN  
TITLE INFORMATION

FOR INTERNAL PURPOSES ONLY

File No.: JM CD Test-JDK

New Effective Date: December 13, 2018

Current Vested Owner: Bob L. Buyer and Betty A. Buyer, husband and wife

Status with Secretary of State: \_\_\_\_\_

Current Legal Description: Property 1 Commitment Legal goes here

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# DECEMBER RELEASE NOTES

## Title

### Commitment Approval Request

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	Underwriting Counsel   KS / MO / NE		508004	

Various changes made per State Counsel: Removed "Who will close the transaction?" and "Customer" sections in Part A. Added Type of Prior Owner's Policy, "Policy/File No." and "Amount" in Part B. Removed the "Or ..." section in Part B.

#### PART B - TO BE COMPLETED BY EXAMINER

##### Search/Examination Information:

1. Entire Period of Chain: Title was examined from: \_\_\_\_\_ to \_\_\_\_\_.

2. Prior Owner's Policy relied upon?  Yes  No

Owner's Policy

Lender's Policy

Previous Commitment

other type here

Underwriter: Policy Underwriter Owner's Policy No.: PolicyNo010101

Policy/File No.: priorpolicy99104

Date: November 26, 2018

Amount: \$27,899.00

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# DECEMBER RELEASE NOTES

## NEW YORK

### DOCUMENTS

#### Escrow

#### Agreement (Receipt and Deposit)

<b>NEW/MOD</b> Mod	<b>REQUESTED BY</b> FNT Albany	<b>FOOTPRINTS No(s).</b>	<b>TFS No(s).</b> 506178	<b>FILE NAME (NEW ITEMS ONLY)</b>
-----------------------	-----------------------------------	--------------------------	-----------------------------	-----------------------------------

Added phone number line to Buyer and Seller signature sections.

**AGREED TO:**

_____	_____
Signature of Depositor	Date
_____	Address: _____
Print Name of Depositor	_____
	Phone: _____
	SSN: _____
_____	_____
Signature of Depositor	Date
_____	Address: _____
Print Name of Depositor	_____
	Phone: _____
	SSN: _____

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# DECEMBER RELEASE NOTES

## NYD1604.doc - Receipt (Lyons - Closing)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
New	CTI N. NY (Lyons)		506863	NYD1604.doc

New document. Render to view complete document.

<b>Date:</b>	December 7, 2018
<b>Search No.:</b>	JM Witness Sweep
<b>Type:</b>	Search Type
<b>Sellers(s):</b>	Sam E. Seller and Susan Seller
<b>Buyers(s):</b>	Bob Buyer and Betty Buyer
<b>Property:</b>	100 Property Address, City, NY 12345

**Received From:**  
**ESCROW OFFICE NAME**

**Delivered To:**  
Title Office Name  
200 Title Office Address  
TO City, NY 12225

**PLEASE PRINT NAME AND FAX OR EMAIL  
THIS RECEIPT BACK TO US. THANK YOU.**

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# DECEMBER RELEASE NOTES

## Title

### Master Commitment (NNY)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	Corporate Counsel		504150	
Updated Schedule B requirements to only show hardcoded FinCen requirement if property(ies) is/are in one of 5 NYC Boroughs - Brooklyn, Bronx, Manhattan, Queens, Staten Island - in addition to existing criteria.				

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# DECEMBER RELEASE NOTES

## NORTH CAROLINA

### MY SCREENS

#### Title Insurance Premiums Screen

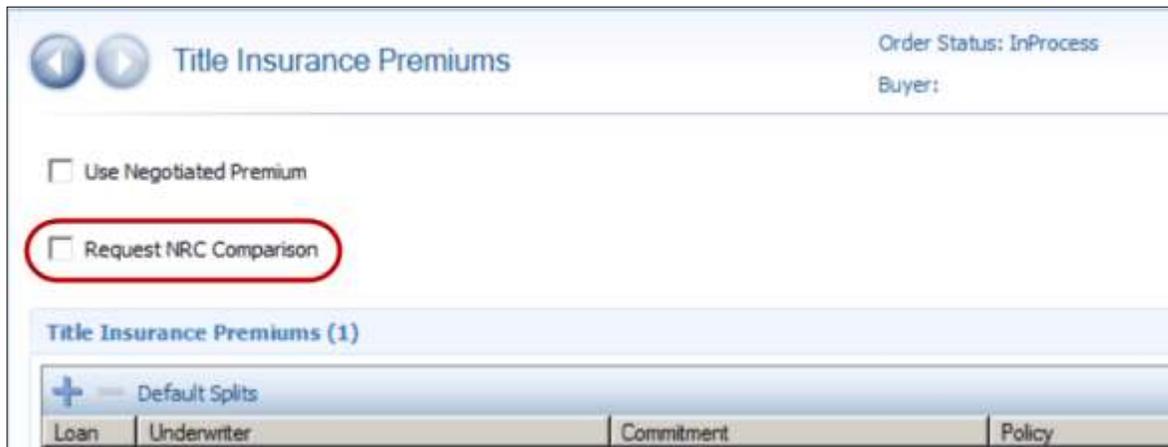
NEW/MOD Mod	REQUESTED BY Doug Gamlen	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
----------------	-----------------------------	-------------------	------------	----------------------------

A new field has been added to the Title Insurance Premiums screen,

- › Request NRC Comparison

These field is available when one of the following My Screens is selected

- › FT-North Carolina Screens
- › FT-North Carolina Screens – CSS
- › North Carolina Screens – Title
- › North Carolina Screens – Commercial
- › North Carolina Screens – Commercial – CSS



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# DECEMBER RELEASE NOTES

## OHIO

### DOCUMENTS

#### Escrow

#### File Cover CTT (Commercial)

NEW/MOD Mod	REQUESTED BY CT OH Comm.	FOOTPRINTS No(s).	TFS No(s). 503554	FILE NAME (NEW ITEMS ONLY)
----------------	-----------------------------	-------------------	----------------------	----------------------------

Updated Property section to show City, State, Zip, and County even if Address has not been entered.

Address: 65 Address, Raleigh, NC 24343	
Purchase Price: \$456,789.00	Loan Amount: \$400,000.00
Property: APN/Parcel ID(s) 123-45-678-9	Akron, OH 11111, County of Test
Checklist (Seller)	Rcvd/Comp Checklist (Buyer)

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# DECEMBER RELEASE NOTES

## OREGON

### DOCUMENTS

#### Escrow

**Information Sheet (Buyer)**

**Information Sheet (Seller)**

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	WT Bend		508011	

Added Tax Deferred Exchange question.

Buyer version:

Will the subject property be your primary residence?  Yes  No

Are you or were you a member of the U.S. Armed Forces?  Yes  No

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

Company Name and Phone: \_\_\_\_\_

By signing below I agree to receive communications and documents relating to the above mentioned transaction via email transmission at this email address: buyer1@email.com

I/We hereby authorize creditors to provide payoff lien information to [Chicago Title Insurance Company](#) to facilitate our escrow transaction.

Seller version:

If yes, describe the work done and provide the name of builder, if any: \_\_\_\_\_

Are you or were you a member of the U.S. Armed Forces?  Yes  No

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

Company Name and Phone: \_\_\_\_\_

By signing below I agree to receive communications and documents relating to the above mentioned transaction via email transmission at this email address: seller1@email.com

Delivery to buyer(s) and seller(s) as used in this transaction, unless otherwise stated, may be effectuated by hand to the principal, regular mail, email or fax to any address for such principal provided in this information sheet. If delivered by regular mail, receipt is deemed to occur seventy-two (72) hours after such mailing. All documents,

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# DECEMBER RELEASE NOTES

## Title

### Combination Form Guarantee OTIRO 76 - Date-Down for Guarantee

<b>NEW/MOD</b> Mod	<b>REQUESTED BY</b> LT Portland	<b>FOOTPRINTS No(s).</b> n/a	<b>TFS No(s).</b> 508322	<b>FILE NAME (NEW ITEMS ONLY)</b>
-----------------------	------------------------------------	---------------------------------	-----------------------------	-----------------------------------

The Guarantee will now reflect the Customer Reference number of the Abstractor contact on Exhibit 1. (If there is no Reference number entered for the Abstractor on the contact screen the label will drop off.)

<b>FIDELITY NATIONAL TITLE INSURANCE COMPANY</b>		<b>GUARANTEE NO. LoanPolNum-456</b>
		<b>Customer Reference: AbstractREF# 123</b>
<b>EXHIBIT 1</b>		
Effective Date	Liability	Fee
at	\$40,000.00	\$250

Also, the OTIRO 76 Date Down endorsement will now reflect the Customer Reference number of the Abstractor contact if entered on the contact screen. Otherwise, the usual Order Reference information will be shown.

The total liability of the Company under said Guarantee and under this endorsement thereto shall not exceed, in the aggregate, the amount stated in said Guarantee.

**Customer Reference: AbstractREF# 123**

**Fidelity National Title Insurance Company**

Countersigned By:

\_\_\_\_\_  
Authorized Officer or Agent

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# DECEMBER RELEASE NOTES

## LOOKUP TABLES

<b>EI Phrases</b>			
<b>NEW/MOD</b> Mod	<b>REQUESTED BY</b> Western Title & Escrow	<b>FOOTPRINTS No(s).</b>	<b>TFS No(s).</b> 506136
<p>Phrases noted below now have the bold description added to the start of the phrase:</p> <ul style="list-style-type: none"> <li>asis02 ("AS IS" Extended Version)</li> <li>blb01 (Land Division)</li> <li>blb02 (Tax Proration - Senior Citizen's Exemption)</li> <li>blb03 (Bills Paid)</li> <li>blb04 (Application to Establish Ownership)</li> <li>blb05 (Application and Certification Exemption)</li> <li>blb06 (Historic Property)</li> <li>coll01 (Collection Setup)</li> <li>comm102 (Commercial Creditors)</li> <li>dor01 (DOR)</li> <li>dos01 (Due on Sale)</li> <li>farmd01 (Property Assessed as Farm or Forest Land)</li> <li>firpta03 (FIRPTA Withholding)</li> <li>hazins02 (Hazard Insurance Outside)</li> <li>hoa02 (HOA Delinquency)</li> <li>hoa03 (HOA No Contact)</li> <li>hoa04 (HOA Seller Adv No Contact)</li> <li>ltpmt01 (Late Payments)</li> <li>mh01 (MH Application)</li> <li>mh02 (MH Exempt)</li> <li>mh05 (MH No Title Insurance)</li> <li>mh06 (MH Park Approval)</li> <li>mh07 (MH Transfer)</li> <li>new03 (New - FHA)</li> <li>new07 (New - VA)</li> <li>nortpr01 (No Rent Prorations)</li> <li>prepay01 (No Prepayment)</li> <li>prptx01 (Prop Tax Disb Stop)</li> <li>rent01 (Rent Statement)</li> <li>simul01 (First Simultaneous Closing)</li> <li>simul02 (Second Simultaneous Closing)</li> <li>slrsp01 (Seller Supplemental)</li> <li>slrtbk01 (Seller Rent Back)</li> <li>txpro01 (Tax Prorations - Additional property)</li> <li>txpro02 (Tax Prorations - Construction)</li> <li>txpro03 (Tax Prorations - Segregated)</li> <li>txpro04 (Tax Prorations - Segregated Additional Property)</li> <li>txpro05 (Tax Prorations - Subdivision Lots)</li> <li>txpro06 (Tax Prorations - Subdivision Sqft)</li> <li>txpro09 (Tax Prorations - Taxes Not Yet Certified)</li> <li>txrecd01 (Tax Record Update)</li> <li>vetex01 (Veteran's Exemption)</li> </ul>			

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# DECEMBER RELEASE NOTES

## PENNSYLVANIA

### DOCUMENTS

#### Escrow

#### Record Owner and Lien Certificate

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	NCS Philly		503340	

Updated to pull Requirements entered on Endorsement screen as continued numbered items after those hardcoded on document.

<p><b>DESCRIPTION:</b></p> <p>[LEGAL DESCRIPTION ENTERED HERE]</p> <ol style="list-style-type: none"> <li>TAXES: [PROMPT]</li> <li>WATER AND SEWER RENTS: [PROMPT]</li> <li>MECHANICS AND MUNICIPAL CLAIMS: [PROMPT]</li> <li>MORTGAGES AND MORTGAGE RELATED DOCUMENTS: [PROMPT]</li> <li>JUDGMENTS: [PROMPT]</li> <li>BANKRUPTCIES FILED IN PENNSYLVANIA: [PROMPT]</li> <li><b>[REQUIREMENTS INSERTED HERE]</b></li> </ol> <p><b>EXCEPTIONS:</b></p> <p>[EXCEPTIONS INSERTED HERE]</p>
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# DECEMBER RELEASE NOTES

## Wire Information (NCS PITTSBURGH ONLY)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	NCS Pittsburgh		505934	

Removed "Cashier's Check" from "Funds to close" sentence for NCS Pittsburgh only.

**FRAUD ALERT! PLEASE READ**  
 THESE WIRE INSTRUCTIONS WILL NOT CHANGE  
 If you receive ANY communications attempting to change these instructions,  
 please immediately call your escrow officer at [\(412\)281-8080](tel:4122818080).

**Funds to close must be in the form of a Wire Transfer.**

Please take this form with you to your bank.

**Personal checks, official checks, direct deposits and electronic transfers are not acceptable for use as closing funds. Your funds to close must be wire transferred to [Escrow Office Name](#).**

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# DECEMBER RELEASE NOTES

## PENNSYLVANIA – PA AGENCY

### MY SCREENS

#### Multiple Screen Changes

NEW/MOD Mod	REQUESTED BY Karen Benelli	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
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When the My screens selected is,

- › PA Commercial the following screens are no longer available in the Commitment section,
  - ›› Title Insurance Premiums
  - ›› Company Charges
  - ›› Endorsements
  - ›› Existing Liens
  
- › PA Title and Escrow the following screens are no longer available in the Commitment section,
  - ›› Title Insurance Premiums
  - ›› Endorsements
  
- › PA Title Only the following screens are no longer available in the Commitment section,
  - ›› Title Insurance Premiums
  - ›› Endorsements
  - ›› Company Charges



# DECEMBER RELEASE NOTES

## SERVICELINK

### DOCUMENTS

#### Escrow

#### Chase Deeds

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
New	ServiceLink		507729	See below

New deeds for Chase bank:

- SLD1099.doc - Arizona Quit Claim Deed (Chase)
- SLD1098.doc - Arizona Special Warranty Deed (Chase)
- SLD1096.doc - California Grant Deed (Chase)
- SLD1097.doc - California Quit Claim Deed (Chase)
- SLD1094.doc - New Mexico Special Warranty Deed (Chase)
- SLD1095.doc - New Mexico Quit Claim Deed (Chase)
- SLD1093.doc - Oregon Special Warranty Deed (Chase)
- SLD1092.doc - Oregon Quit Claim Deed (Chase)

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# DECEMBER RELEASE NOTES

## TEXAS

### DOCUMENTS

#### Escrow

#### Escrow Instructions (Interest Bearing Accounts)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	TX		505131	

Added Escrow Officer name and title fieldcodes under Escrow Office name.

<p><a href="#">ABC Settlement Agent</a>  <a href="#">Melissa G. Smith, Closing Specialist</a>  123 Settlement Street  Anywhere, TX 12345</p>	<p>DATE: November 27, 2018  ESCROW NO: <a href="#">2018050022 - CP Test TX-Org</a>  PROPERTY ADDRESS:  12345 Property Street  Anywhere, TX 12345</p>
<p><b>ESCROW INSTRUCTIONS</b>  (Interest Bearing Accounts)</p>	

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# DECEMBER RELEASE NOTES

## Non-Imputation Affidavit and Indemnity

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
New	TX		503435	SSTXD00279.doc

New document. Render to view complete document.

### Non-Imputation Affidavit and Indemnity

(For Purposes of Issuing the Texas T-24 or T-24.1 Endorsement)

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

1. The undersigned is **FirstOfficerTitle** of **Buying Corporation**.
2. To the best knowledge of the undersigned,
  - A. There are presently no defects in or liens, encumbrances or other claims against the title to the property described in the Commitment for Title Insurance No. **CommitmentNum11111**, having an Effective Date of **November 6, 2018**, issued by **Chicago Title Insurance Company** (hereinafter referred to as "the Company") other than as disclosed in exception Nos. **1.**, **2.** and **3.** on Schedule B of said commitment, other than the following (If none, state "None"); and:
 

**User can enter additional exceptions in this text box, or they can enter None. I have included additional text in this field so that I can properly test how this will wrap on the rendered document. HR goes here.**
  - B. There are presently no inchoate rights which may ripen into any defect, lien, encumbrance or claim against the title to said property except as may be created by any instrument or action required in Schedule C of said commitment, other than the following: (If none, state "None")
 

**User can enter the problems to be included on Schedule C in this text box with some additional text included in order to properly test how this will wrap on the rendered document. HR goes here.**
3. The undersigned makes these statements after having questioned all of the other partners/officers/directors

\*This document replaces "Agreement (Non Imputation Endorsement Indemnity)"\*

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# DECEMBER RELEASE NOTES

## REPORTS

Dallas CPF Daily Summary				
NEW/MOD MOD	REQUESTED BY TX	FOOTPRINTS No(s).	TFS No(s). 505909	FILE NAME (NEW ITEMS ONLY)
<ul style="list-style-type: none"><li>Removed the following exception:<ul style="list-style-type: none"><li>Commercial orders where product type description does not contain "Commercial" (suppressed if profile path contains '%\NCS\%')</li></ul></li><li>Report has been updated to flag any order as commercial if the commercial box is checked and not look at the product solely.</li></ul>				

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# DECEMBER RELEASE NOTES

## WASHINGTON

### DOCUMENTS

#### Escrow

#### Lummi Tribal Water and Sewer District Req

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	CT Bellingham		505499	

Updated to match most recent version provided.

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#### Master Real Estate Excise Tax Affidavit

#### Real Estate Excise Tax Affidavit

#### Real Estate Excise Tax Affidavit - Exempt

#### Real Estate Excise Tax Affidavit - Land Use

#### Real Estate Excise Tax Affidavit - Personal Property

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	WA		508108/508086	

Revised to use the "other use" field on the property screen to pull the 'Land Use Code(s)' - if this is empty then document will function as it did before.

Property

Property type:

Property use:  Land Use Codes here

Legal description of property (if more space is needed, you may attach a separate sheet to each page of the affidavit)

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

<b>5</b> Select Land Use Code(s): <a href="#">Land Use Codes here</a> Enter any additional codes: _____ <small>(See back of last page for instructions)</small>	<b>7</b> List all personal property (tangible and intangible) included in selling price. _____
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# DECEMBER RELEASE NOTES

## Snohomish County Advance Tax Request

<b>NEW/MOD</b> Mod	<b>REQUESTED BY</b> CT Everett	<b>FOOTPRINTS No(s).</b>	<b>TFS No(s).</b> 507541	<b>FILE NAME (NEW ITEMS ONLY)</b>
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Added custom field prompts to the highlighted sections.

TRANSACTION DATE: 11/09/18	REASON FOR REQUEST: <input type="checkbox"/> SALE <input type="checkbox"/> TRANSFER <input type="checkbox"/> BANKRUPTCY <input type="checkbox"/> CLOSURE <input type="checkbox"/> OTHER: _____		
IS THIS A REAL PROPERTY SALE ONLY? <input checked="" type="checkbox"/> YES <input type="checkbox"/> NO	REAL PROPERTY CURRENTLY LEASED? <input checked="" type="checkbox"/> YES <input type="checkbox"/> NO		
TENANT(S) REMAINING AT LOCATION? <input checked="" type="checkbox"/> YES <input type="checkbox"/> NO	TENANT(S) MOVING TO? _____		
TOTAL BUSINESS SALE PRICE: \$250,000.00	BUSINESS EQUIPMENT SALE PRICE: \$ _____		
LEASEHOLD IMPROVEMENTS: \$ _____	BUSINESS INTANGIBLES: \$ _____	OTHER: \$ _____	
ASSET DISPOSITION/BUSINESS CLOSURE DATE:			
<input checked="" type="checkbox"/> SOLD AT AUCTION	<input checked="" type="checkbox"/> SOLD PIECEMEAL	<input checked="" type="checkbox"/> JUNKED/DONATED	<input checked="" type="checkbox"/> ABANDONED AT SITE
<input checked="" type="checkbox"/> TRANSFERRED WITHIN COUNTY	<input checked="" type="checkbox"/> TRANSFERRED OUT OF COUNTY	<input checked="" type="checkbox"/> OTHER-EXPLAIN	<input checked="" type="checkbox"/> IN STORAGE PROVIDE SITE ADDRESS: _____

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# DECEMBER RELEASE NOTES

## Reports

### Order Summary by Branch/Escrow Officer

NEW/MOD MOD	REQUESTED BY FT WA	FOOTPRINTS No(s).	TFS No(s). 502127	FILE NAME (NEW ITEMS ONLY)
----------------	-----------------------	-------------------	----------------------	----------------------------

Modified report with the following changes

- Opened/Closed Count Summary columns:
  - Opened & List Conv Column:
    - renamed column header to 'Opened T&E Refi.'
    - Count of files with Escrow Open Date in requested date range where Order Type is *Title & Escrow* and Transaction Type is *Refinance*.
- Opened EO
  - New column – placed between Opened T&E and MTD Opened
  - Count of files with Escrow Open Date in requested date range where Order Type is Escrow Only.
- Opened T&E
  - Renamed column header to 'Opened T&E Sale'
  - Count of files with Escrow Open Date in requested date range where Order Type is Title & Escrow and Transaction Type is Purchase.
- MTD Opened
  - Count of files with Escrow Open Date in requested date range where Order Type is Title & Escrow, Escrow Only or Title & SubEscrow
- MTD List Conv
  - Count of files with Escrow Open Date in requested date range and Date Order Received is any prior month.
- MTD Opened & List Conv
  - Sum of MTD Opened and MTD List Conv.
- Closed
  - Renamed column header to 'Opened TO w/ Closer'
  - Count of files with Escrow Open Date in requested date range where Order Type is Title Only and Escrow Officer (dropdown) is not empty/null.
- Closed T&E
  - Removed column
- MTD Closed
  - No change.
- MTD Purchase Order Summary columns: - remove this section header as well. All but one column is going to be removed. Newly named remain column go under Opened/Closed Count Summary
- Opened Count
  - Removed column
- % Opened
  - Removed column.
- Closed Count
  - Removed column
- % Closed
  - Renamed column header to 'MTD % Closed'
  - MTD Closed column / MTD Opened & List Conv column = MTD % Closed
- Revenue
  - Removed column
- MTD Revenue Summary columns:
  - Escrow
    - Consider Bill Codes ESC, SUB and DOC.
  - Title
    - No change.



## DECEMBER RELEASE NOTES

- Notary
  - Move column right to be shown to the right of Total column.
  - Consider Bill Codes NOTe and NOTeBS.
- Other
  - No change.
- Total
  - Sum of Escrow, Title and Other.
- Avg per Order
  - No change.

Updated excel export columns with the same changes, but left pre-populated excel formulas as placeholders where they exist and not changes to the additional columns displayed on excel not shown on PDF format  
Update programming notes with the above column and logic changes

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## WISCONSIN

### DOCUMENTS

#### Escrow

#### eTransfer Return Form Worksheet

NEW/MOD Mod	REQUESTED BY CT WI	FOOTPRINTS No(s).	TFS No(s). 497787	FILE NAME (NEW ITEMS ONLY)
----------------	-----------------------	-------------------	----------------------	----------------------------

Various changes, please see screenshots for details.

\*screenshot 1 of 2

**eTRANSFER RETURN FORM WORKSHEET**

**Company Name**

Grantor/Grantee coding works the same way, just showing how it will look for an Organization and an

County: Adams

Grantor Type: Corporation → Pulls the Seller

Grantor Name: Seller Corp

Grantor SS No.: 999-99-9999 → Hardcoded

Grantor Address: 1 Seller Fwd Address

Grantor Phone: (800)111-2222

Relationship: Corp/Shareholder/Subsidiary →

Ownership: Full →

Rights Retained: None →

Grantee Type: Individual → Pulls the Buyer

Grantee Name: Last Name: Buyer First Name: Bob and Betty → Names have been

Grantee SS No.: 999-99-9999 → Hardcoded

Grantee Address: 1 Buyer Fwd Address, Fwd City, WI 12345

Grantee Phone: (123)111-2222 → Will pull from Name 1. Forwarding

Tax Bill Address: Same as tax bill mailing address?  Yes  No

Parcel: Adams

Check:  All  Part of →

Parcel No.: 11-12345

Primary Residence:  Yes  No →  Select if property is primary residence

Physical Address: 100 Property Address, City, WI 12345

Property Type: →

Land Only

Land/Buildings

Condominium

Other:

# DECEMBER RELEASE NOTES

## eTransfer Return Form Worksheet (continued from previous page)

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	CT WI		497787	

Various changes, please see screenshots for details.

\*screenshot 2 of 2

**eTRANSFER RETURN FORM WORKSHEET**  
(continued)

Predominant Use: → Predominant Use  
Single Family  
Agricultural  
Commercial  
Manufacturing/Telephone Co.  
Miscellaneous  
Multi Family  
Single Family  
Time Share Unit  
Utility

Single Family  
 Time Share Unit  
 Multi Family No. of Units: \_\_\_\_\_  
 Agricultural  
 Commercial; explain: \_\_\_\_\_  
 Utility  
 Miscellaneous  
 Manufacturing/Telephone Co.

Total Acres: 300 → Total acres  
300

Feet of Water Frontage: 0

Transfer Type: Sale (Including Original Land Contract) → Transfer Type  
Sale (Including Original Land Contract)  
Deed in satisfaction of Land Contract  
Exchange  
Gift  
Other  
Sale (Including Original Land Contract)

Conveyance Date: November 9, 2018

Conveyance Document Types: Warranty/Condo Deed → Conveyance Document Types  
Warranty/Condo Deed  
Land Contract  
Other  
Quit Claim Deed  
Warranty/Condo Deed

Financing: → Financing  
Financial inst. - conventional  
Assumed existing financing  
Financial inst. - conventional  
Financial inst. - government  
No financing involved  
Obtained by seller  
Other Third party financing

No Financing Involved  
 Financial Institution - Conventional  
 Financial Institution - Government  
 Obtained From Seller  
 Assumed Existing Financing  
 Other Third Party Financing

Total value of real estate transferred and Value subject to fee: \$175,000.00

Value subject to a fee: \$750.00 → Value subject to fee  
\$750.00

Total value of real estate transferred Total value of real estate transferred  
\$175,000.00

Value of personal property transferred but excluded from total value of real estate transferred Value of personal property transferred but excluded from total value of real estate transferred  
\$1,000.00

Value of personal property transferred but excluded from total value of real estate transferred: \$1,000.00

Value of property exempt from local property tax included on total value real estate transferred: \$2,500.00 → Value of property exempt from local property tax included on total value real estate transferred  
\$2,500.00

Agent for Grantor:

Name: Mickey Mouse

Address: 1 Seller Current Address, Seller Current City, WI 12345

Phone No.: (800)111-2222

If the Seller is an Organization, the person associated with the Organization will pull (as shown). If the Seller is an Individual, there will

Agent for Grantee:

Name: \_\_\_\_\_

Address: \_\_\_\_\_

Phone No.: \_\_\_\_\_

If the Buyer is an Organization, the person associated with the Organization will pull. If the Buyer is an Individual, there will just be blank

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# DECEMBER RELEASE NOTES

## Secured Undertaking

NEW/MOD	REQUESTED BY	FOOTPRINTS No(s).	TFS No(s).	FILE NAME (NEW ITEMS ONLY)
Mod	CT Waukesha		503792	

Paid and delivered to address has been changed to show the 20825 Swenson Dr. address.

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# DECEMBER RELEASE NOTES

## REPORTS

Title Production				
NEW/MOD MOD	REQUESTED BY WI	FOOTPRINTS No(s).	TFS No(s). 505093	FILE NAME (NEW ITEMS ONLY)
<ul style="list-style-type: none"><li>When profile state = 'WI', orders where the order number begins with 'M' or 'NB' will be suppressed</li></ul>				

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# DECEMBER 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.