

SOFTPRO SELECT

June 2023
RELEASE NOTES



Testing Release Date: June 1, 2023
Production Release Date: June 12, 2023

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ALL STATES/SITES

DOCUMENTS

Escrow

<i>Settlement Statements (CDF/HUD)</i>			
New/Mod Change	Requested By Config	Incident No.	TFS No. 762663
Updated to sort proration lines to show County Taxes first, followed by City, Assessments, any additional prorations, etc.			

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Title

<i>ALTA JR1 - Residential Limited Coverage</i>			
New/Mod Change	Requested By CA FT San Diego	Incident No.	TFS No. 767048
<p>The ALTA JR1 endorsement has been modified to enable item 4.b. (for the Mortgage/Deed of Trust) to pull in Exceptions entered on the Endorsements screen if the custom field "Monetary liens, other than insured mortgage, affecting title - OR leave blank to select exceptions" is left empty.</p> <p>If both the custom field is blank and there are no exceptions added for the endorsement on the Endorsements screen, NONE will print for item 4.b., as usual.</p>			

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REPORTS

1099 Data Export			
New/Mod Change	Requested By Corp 1099 Accounting	Incident No.	TFS No. 767547
Updated logic and formatting.			
Affected item(s): 1099 Data Export			

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1099-Misc Detail			
New/Mod Change	Requested By Corp 1099 Accounting	Incident No.	TFS No. 767851
Updated logic and formatting. Added a new Excel export option.			
Affected item(s): 1099-Misc Detail			

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Commissions by Sales Rep			
New/Mod Change	Requested By Security Title Agency Admin	Incident No.	TFS No. 765925
Added a parameter to include Sale and Refi counts.			
Affected item(s): Commissions by Sales Rep			

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In Process Pipeline Report			
New/Mod Change	Requested By FNTA Admin	Incident No.	TFS No. 767051
Updated Brief and Standard versions to show the Marketing Source Contact.			
Affected item(s): In Process/Pipeline Orders			

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ARIZONA

DOCUMENTS

Escrow

Letter (Equifax Credit Watch)			
New/Mod Change	Requested By LT Arizona	Incident No.	TFS No. 768296
Hyperlink revised:			
<ul style="list-style-type: none"> Lost Wallet Assistance, if your wallet is lost or stolen, and one-stop assistance in canceling and reissuing credit, debit and personal identification cards. <p>You must complete the enrollment process by May 26, 2023. We urge you to consider enrolling in this product, at no cost to you. In order to do so, you will need to use the following:</p> <p>Redemption URL: http://www.equifax.com/activate/</p> <p>Activation Code(s): 12345</p>			
Affected item(s):			
Letter (Equifax Credit Watch)			

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Title

<i>ALTA Commitments (2)</i>							
New/Mod Change	Requested By CT Phoenix	Incident No.	TFS No. 767637				
For CT Phoenix only: Revised the Commitment to show the Escrow Officer on Schedule A for Title Only orders.							
<table border="1"> <tr> <th>ISSUING OFFICE:</th> <th>FOR SETTLEMENT INQUIRIES, CONTACT:</th> </tr> <tr> <td>Title Officer: Sandy L Moore Chicago Title Insurance Company 236 Quarry Road Tempe, AZ 99999</td> <td>Escrow Officer: Joseph D Kirby JKirby@notreal.com Chicago Title Insurance Company 236 Quarry Road Tempe, AZ 99999 Main Phone: (800)777-4444 Main Fax: (800)444-7777</td> </tr> </table>		ISSUING OFFICE:	FOR SETTLEMENT INQUIRIES, CONTACT:	Title Officer: Sandy L Moore Chicago Title Insurance Company 236 Quarry Road Tempe, AZ 99999	Escrow Officer: Joseph D Kirby JKirby@notreal.com Chicago Title Insurance Company 236 Quarry Road Tempe, AZ 99999 Main Phone: (800)777-4444 Main Fax: (800)444-7777	<p>Order Number: CD Order Test Loan Number: 12315114 Property Address: 1030 First Street, City1, AZ 24124</p>	
ISSUING OFFICE:	FOR SETTLEMENT INQUIRIES, CONTACT:						
Title Officer: Sandy L Moore Chicago Title Insurance Company 236 Quarry Road Tempe, AZ 99999	Escrow Officer: Joseph D Kirby JKirby@notreal.com Chicago Title Insurance Company 236 Quarry Road Tempe, AZ 99999 Main Phone: (800)777-4444 Main Fax: (800)444-7777						
Affected item(s): ALTA Commitment 2016 (AZ) ALTA Commitment 2021 (AZ)							

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REPORTS

FNT Admin Dump Report			
New/Mod Change	Requested By FNTA Admin	Incident No.	TFS No. 767294
Updated formatting and rev calculation changes.			
Affected item(s): FNT Admin Dump Report			

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Opened/Closed/Canceled Orders by Reps w/Agents			
New/Mod Change	Requested By FNT Agency Admin	Incident No.	TFS No. 765752
Added Revenue data.			
Affected item(s): Opened/Closed/Canceled Orders by Reps w/Agents			

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CALIFORNIA

DOCUMENTS

Escrow

<i>Commission Instruction</i>							
New/Mod	Requested By	Incident No.	TFS No.				
New	CA Timeshare	INC210448291	766474				
New documents. Please render to view in full.							
 <div style="float: right; text-align: right;"> <p>100 Escrow Office Street EO City, CA 54545 Phone: (800)777-4444 / Fax: (800)444-7777</p> </div> <p>INSTRUCTIONS TO PAY COMMISSION</p> <p>Date: May 25, 2023 Escrow No.: JM CD Test 2023-MGS</p> <p>Upon close of escrow, from funds received and/or held by you on my behalf, you are instructed to pay:</p> <table style="width: 100%; border: none;"> <tr> <td style="width: 80%;">Century 22 Attn: Cindy Jones</td> <td style="text-align: right; width: 20%;">\$ 12,625.00</td> </tr> <tr> <td>TOTAL COMMISSION BEING PAID:</td> <td style="text-align: right;">\$ 12,625.00</td> </tr> </table> <p>The employment of said Broker(s) to effect the sale-mortgage-exchange of the property described in said escrow is acknowledged by the undersigned, who agreed to pay said sum to said Broker(s) as a commission for services rendered pursuant to said employment.</p>				Century 22 Attn: Cindy Jones	\$ 12,625.00	TOTAL COMMISSION BEING PAID:	\$ 12,625.00
Century 22 Attn: Cindy Jones	\$ 12,625.00						
TOTAL COMMISSION BEING PAID:	\$ 12,625.00						
Affected item(s): Commission Instruction							

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<i>Daily Recording Sheet</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change	FNTG Lenders Direct		767841
Revised to pull the escrow officer's email to the top right of the document.			
Affected item(s): Daily Recording Sheet			

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<i>MH Park Request</i>			
New/Mod Change	Requested By FNT Alameda Contra Costa	Incident No.	TFS No. 767837
Added new question.			
<div style="border: 1px solid black; padding: 5px;"> <p>NEW OWNER INFORMATION: Bryan B. Buyer and Brenda B. Buyer</p> <p>Space Rent Amount: \$ _____ Due Through Escrow: <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Additional Charges Due from New Owner, if any, to be paid through Escrow: \$ _____ (please state "NONE" if none)</p> <p>Description of Charges Due: _____</p> <p>Buyer Park Approved: <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Rental/Lease Agreement Signed and Approved: <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p>Estimated Closing Date: June 2, 2023</p> </div>			
Affected item(s): MH Park Request			

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<i>Note Installment (Interest Included)</i>			
New/Mod Change	Requested By CT SoCal	Incident No.	TFS No. 767239
Updated language for seller financing.			
<div style="border: 1px solid black; padding: 5px;"> <p>Each payment shall be credited on interest then due, at the rate of _____ Percent (_____ %) per annum, and the remainder on principal; and interest shall thereupon cease upon the principal so credited. Should default be made in payment of any installment when due the whole sum of principal and interest shall become due at the option of the holder of this Note. Principal and interest payable in lawful money of the United States. If action be instituted on this Note I promise to pay such sum as the Court may fix as attorney's fees. This Note is secured by a Deed of Trust to Escrow Office Name, a California corporation, herein called Trustee and is given and accepted as a portion of the purchase price.</p> </div>			
Affected item(s): Note Installment (Interest Included)			

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<i>PCOR Update</i>			
New/Mod Change	Requested By	Incident No.	TFS No.
	CA		768823
<p>Updated to reflect most recent version from the state BOE website.</p> <p>https://www.boe.ca.gov/proptaxes/pdf/sample-boe502a.pdf</p> <p>Affected item(s): Affidavit (Change of Trustee) with PCOR Affidavit (Death of Joint Tenant - Prompt) with PCOR Affidavit (Death of Joint Tenant) with PCOR Affidavit (Death of Life Tenant) with PCOR Affidavit (Death of Spouse - Prompt) with PCOR Affidavit (Death of Spouse) with PCOR Affidavit (Death of Trustee) Generic with PCOR Affidavit (Death of Trustee) with PCOR Affidavit (Successor Trustee) Generic with PCOR Affidavit (Successor Trustee) Other with PCOR Affidavit (Successor Trustee) with PCOR Affidavit (Surviving Domestic Partnership WROS) with PCOR Affidavit (Surviving Domestic Partnership) with PCOR Affidavit (Surviving Spouse CP) with PCOR Affidavit (Surviving Spouse CPWROS) with PCOR Grant Deed In and Out of Trust with PCOR Grant Deed In and Out of Trust with PCOR - SAC Grant Deed with PCOR Grant Deed with PCOR - SAC Interspousal Transfer Deed CP with PCOR Interspousal Transfer Deed CP with PCOR - SAC Interspousal Transfer Deed SC with PCOR Interspousal Transfer Deed SC with PCOR - SAC Interspousal Transfer Deed with PCOR Interspousal Transfer Deed with PCOR - SAC Preliminary Change of Ownership (PCOR - Addtl Info - Pg 3-4) Preliminary Change of Ownership (PCOR - All Pages) Preliminary Change of Ownership (PCOR - Form Only - Pg 1-2) Preliminary Change of Ownership (PCOR - Form Only - Pg 1-2) Preliminary Change of Ownership (PCOR) - SAC Quitclaim Deed with PCOR</p>			

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<i>Policy Writeup</i>			
New/Mod Change	Requested By	Incident No.	TFS No.
	CT SoCal		766478
<p>Added prompts for the endorsement notes and removed the Applies to Exception No. and Not Correct columns.</p> <p>Affected item(s): Policy Writeup</p>			

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<i>Settlement Statements (CDF/HUD)</i>			
New/Mod Change	Requested By	Incident No.	TFS No.
	Config		764699
<p>CDF/HUD settlement statements are available in the tree as "Final" which will default the status to "Final" status.</p> <p>FNT LA - Final version will default to no signatures for buyer/seller and settlement agent. This can be changed but always defaults to no signatures.</p> <p>Affected item(s): Master Statement, Legal (CDF)</p>			

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<i>Signing Confirmation</i>			
New/Mod Change	Requested By CT Sacramento	Incident No.	TFS No. 768038
Updated to have the date, time, location, notary and notary phone to prompt user for information.			
Affected item(s): Signing Confirmation			

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<i>Status Sheet</i>			
New/Mod New	Requested By CA Timeshare	Incident No. INC210448291	TFS No. 766474

New documents. Please render to view in full.

ESCROW STATUS SHEET				
Escrow No.:	JM CD Test 2023-MGS			
Escrow Officer:	Melissa G Smith			
Est. Close:	June 23, 2023			
Property:	100 Property Avenue, Property City, CA 55555			
Seller(s):	Samuel S. Seller and Samantha S. Seller			
Address:	1 Seller Crmnt Address, Seller Crmnt City, CA 32852			
Home Phone:	(409)222-3334	Business:	(409)333-2222	Cell: (409)444-5555
Email:	Seller1Email@email.com			
Buyer(s):	Bryan B. Buyer and Brenda B. Buyer			
Address:	555 Buyer Current Street, Byr Current City, CA 27609			
Home Phone:	(408)555-6677	Business:	(408)555-4433	Cell: (408)555-7777
Email:	Buyer1@email.com			
Title Co.:	Title Office Name			
Title Officer:	Joseph D Kirby			
	NEED	Requested or Prepared	Received	REMARKS
Initial Deposit Check / Credit Card / Wire				
Tax Clearance				
Title Insurance Prelim				
Estoppel				

Affected item(s):
Status Sheet

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MY SCREENS

Order Contacts / Property Address (Project) Screen

New/Mod Mod	Requested By Karen Benelli	Incident No.	TFS No.
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The **smartview Order No.** field has been moved to the bottom of the **Order Contacts / Property Address (Project)** screen.

This change is visible when one of the following **My Screens** is selected:

- > **Northern CA -EPU Screens**
- > **SoCal EPU Screens**

The screenshot shows the 'Order Contacts / Property Address (Project)' screen. At the bottom, the 'smartview Order No.' field is highlighted with a red circle. The screen includes various form fields and a table of contacts.

Type	Name	Code	Phone	Fax	Main C
Escrow Company		E			
Settlement Agent	Fidelity National Title Company of	A			
Title Company	Chicago	T			
Title Company	Chi	T2			
Title Company	Chicago Title Company	T3			

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<i>Order Entry Screen</i>			
New/Mod	Requested By	Incident No.	TFS No.
Mod	Karen Benelli		

The **smartview Order No.** field has been moved to the bottom of the **Order Entry** screen.

This change is visible when one of the following **My Screens** is selected:

- | | |
|---------------------------------------|----------------------------|
| > CA – Foreclosure Dept | > SoCal All Screens |
| > CA – Commercial | > SoCal Escrow Screens |
| > CA – Commercial CSS | > SoCal Payoff Screens |
| > Northern CA – All Screens | > SoCal Policy Screens |
| > Northern CA – FT SAC Commercial 010 | > SoCal Production Screens |
| > Northern CA – Policy Screens | > SoCal Title Screens |
| > PIRT Title | > |

The screenshot shows the 'Order Entry' interface. At the top, there are navigation arrows and the title 'Order Entry'. Below this, there are several form fields:

- Transaction type:** Radio buttons for Purchase, Refinance (selected), Equity, and Other.
- Checkboxes:** Commercial, Construction, Cash sale, and Out of county.
- Order type:** A dropdown menu.
- Product type:** A dropdown menu.
- Policy type:** A dropdown menu.

 Below these fields is a 'Notes (0)' section. Underneath the notes, there is an 'Ownership profile:' dropdown menu set to 'Default\Support - ILWI'. At the bottom of the form, the 'smartview Order No.:' field is highlighted with a red circle, indicating its new position at the bottom of the screen.

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Order Entry Screen

New/Mod Mod	Requested By Karen Benelli	Incident No.	TFS No.
-----------------------	--------------------------------------	---------------------	----------------

The **smartview Order No.** field has been moved to the bottom of the **Order Entry** screen.

This change is visible when one of the following **My Screens** is selected:

- > **Northern CA – Commercial Screens**
- > **SoCal – Commercial Screens**

The screenshot shows the 'Order Entry' screen with various form fields. At the bottom, the 'smartview Order No.' field is highlighted with a red circle. Other visible fields include 'Auto-publish to SoftPro Live', 'SoftPro Live template', 'Transaction type' (Purchase, Refinance, Equity, Other), 'Commercial', 'Construction', 'Cash sale', 'Out of county', 'Order type', 'Product type', 'Policy type', 'Ownership profile' (Default\Support - CA), and 'Notes (0)'.

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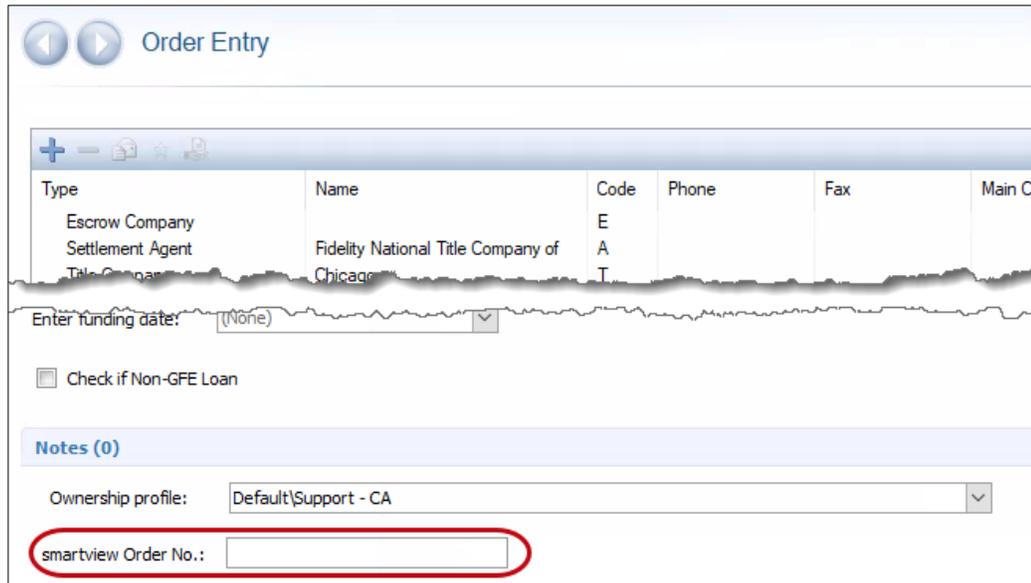
Order Entry Screen

New/Mod Mod	Requested By Karen Benelli	Incident No.	TFS No.
-----------------------	--------------------------------------	---------------------	----------------

The **smartview Order No.** field has been moved to the bottom of the **Order Entry** screen.

This change is visible when one of the following **My Screens** is selected:

- > **Northern CA – DSC Screens**
- > **Northern CA – RLC Screens**
- > **SoCal Out of State Orders**



The screenshot shows the 'Order Entry' interface. At the top, there are navigation arrows and the title 'Order Entry'. Below this is a table with columns: Type, Name, Code, Phone, Fax, and Main C. The table contains three rows of data:

Type	Name	Code	Phone	Fax	Main C
Escrow Company		E			
Settlement Agent	Fidelity National Title Company of	A			
Title Company	Chicago	T			

Below the table, there is a dropdown menu for 'Enter funding date:' with '(None)' selected. A checkbox labeled 'Check if Non-GFE Loan' is present and unchecked. A section titled 'Notes (0)' is visible. Below the notes, there is a dropdown menu for 'Ownership profile:' with 'Default\Support - CA' selected. At the bottom, the 'smartview Order No.:' field is highlighted with a red circle.

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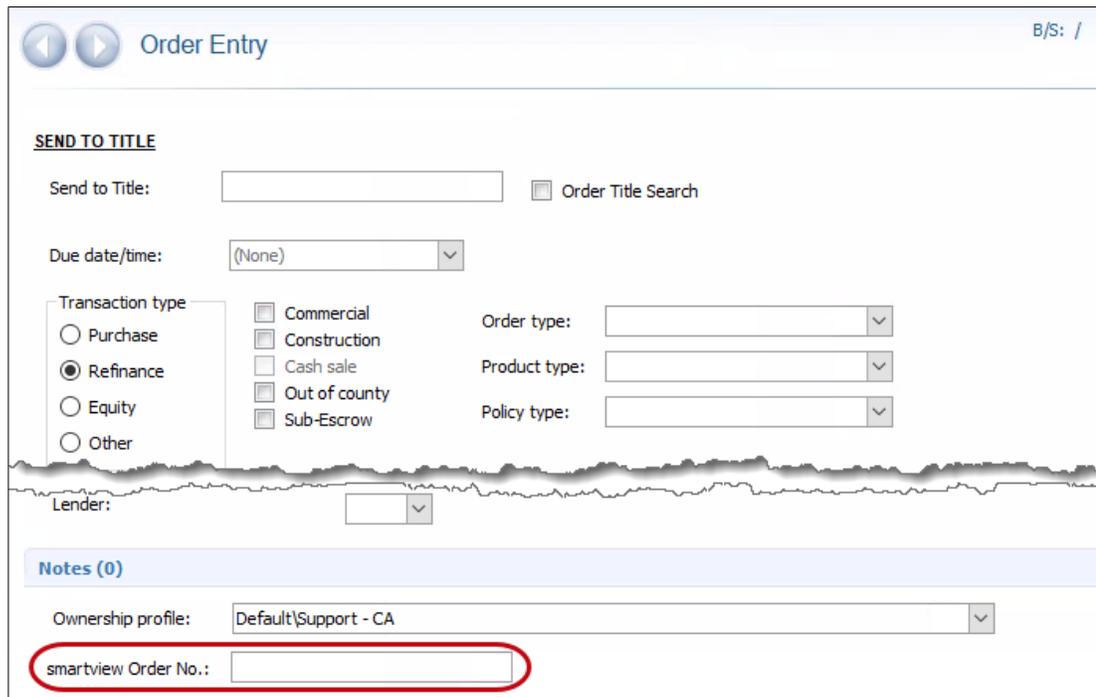
[Open Order Entry Screen](#)

New/Mod Mod	Requested By Karen Benelli	Incident No.	TFS No.
-----------------------	--------------------------------------	---------------------	----------------

The **smartview Order No.** field has been moved to the bottom of the **Order Entry** screen.

This change is visible when one of the following **My Screens** is selected:

- > **SoCal Escrow Screens Impact to SPS**
- > **SoCal Payoff Screens Impact to SPS**
- > **SoCal Title Screens Impact to SPS**



The screenshot shows the 'Order Entry' screen with the following fields and options:

- SEND TO TITLE**
 - Send to Title:
 - Order Title Search
- Due date/time:
- Transaction type:
 - Purchase
 - Refinance
 - Equity
 - Other
- Commercial
 - Construction
 - Cash sale
 - Out of county
 - Sub-Escrow
- Order type:
- Product type:
- Policy type:
- Lender:
- Notes (0)**
- Ownership profile:
- smartview Order No.:** (This field is circled in red in the screenshot)

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Title Insurance Premiums Screen

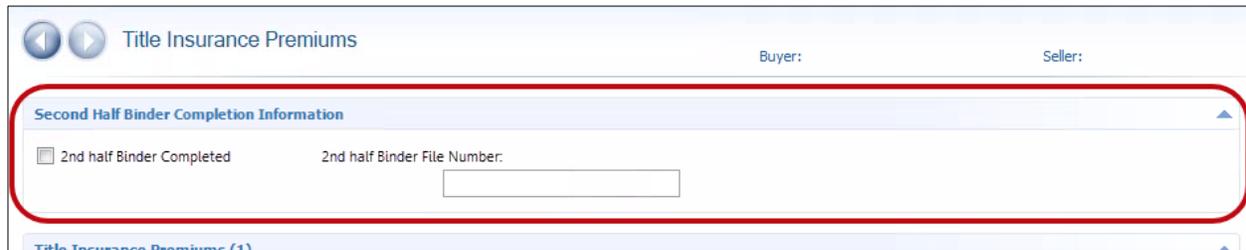
New/Mod	Requested By	Incident No.	TFS No.
Mod	Karen Benelli		

The **Title Insurance Premiums** screen has been modified to include the **Second Half Binder Completion Information** section. The new section includes a:

- > **2nd half Binder Completed check box**
- > **2nd half Binder File Number field**

This change is visible when one of the following **My Screens** is selected:

- | | |
|---------------------------------------|-----------------------------|
| > CA – Foreclosure Dept | > PIRT Title |
| > CA – Commercial | > SoCal All Screens |
| > CA – Commercial CSS | > SoCal Commercial Screens |
| > Northern CA – All Screens | > SoCal Escrow Screens |
| > Northern CA – Commercial Screens | > SoCal Out of State Orders |
| > Northern CA – DSC Screens | > SoCal Payoff Screens |
| > Northern CA – EPU Screens | > SoCal Policy Screens |
| > Northern CA – Escrow Screens | > SoCal Production Screens |
| > Northern CA – FT SAC Commercial 010 | > SoCal Sub Escrow Screens |
| > Northern CA – Policy Screens | > SoCal Title Screens |
| > Northern CA – RLC Screens | |
| > Northern CA – Title Screens | |



The screenshot shows the 'Title Insurance Premiums' screen. At the top, there are navigation arrows and the title 'Title Insurance Premiums'. Below the title, there are fields for 'Buyer:' and 'Seller:'. The main content area is titled 'Second Half Binder Completion Information' and is highlighted with a red border. Inside this section, there is a checkbox labeled '2nd half Binder Completed' and a text input field labeled '2nd half Binder File Number:'. Below the main section, there is a scrollable list titled 'Title Insurance Premiums (1)'.

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Title

<i>CLTA Preliminary Report</i>							
New/Mod Change	Requested By FNT Los Angeles	Incident No.	TFS No. 767157				
Per CA State Counsel, removing the word "FORM" from the header of the Preliminary Report.							
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td colspan="2" style="text-align: center;">PRELIMINARY REPORT</td> </tr> <tr> <td style="width: 60%; vertical-align: top;"> <p>Issued By:</p>  </td> <td style="width: 40%; vertical-align: top;"> <p>Prelim Number:</p> <div style="border: 1px solid black; padding: 10px; text-align: center; margin: 10px auto; width: 80%;"> <p>COM111111</p> </div> </td> </tr> </table>				PRELIMINARY REPORT		<p>Issued By:</p> 	<p>Prelim Number:</p> <div style="border: 1px solid black; padding: 10px; text-align: center; margin: 10px auto; width: 80%;"> <p>COM111111</p> </div>
PRELIMINARY REPORT							
<p>Issued By:</p> 	<p>Prelim Number:</p> <div style="border: 1px solid black; padding: 10px; text-align: center; margin: 10px auto; width: 80%;"> <p>COM111111</p> </div>						
<p>Affected item(s): CLTA Preliminary Report Form 2006 (CA - NOCAL) CLTA Preliminary Report Form 2006 (CA) DRAFT - CLTA Preliminary Report Form 2006 (CA)</p>							

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COLORADO

DOCUMENTS

Escrow

<i>Acknowledgment (Witness Required)</i>			
New/Mod	Requested By	Incident No.	TFS No.
New	Heritage Title		768235
New document. Please render to view in full.			
Mark of Principal: _____			
Name of Witness: _____		Name of Principal: _____	
Name of Witness: _____			
STATE OF COLORADO		}ss:	
COUNTY OF COUNTY			
The foregoing instrument was acknowledged before me this _____ day of _____, 20____, by _____, who signed by way of mark in the presence of this/these witness(es).			
		_____ Notary Public	
		_____ Print Name	
(Seal)		My commission expires: _____	

Affected item(s):
COD1357.doc - Acknowledgment (Witness Required) (New)

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<i>Affidavit (Supplemental)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change	Heritage Title		768279
Revised to remove the recording information for the death certificate when the "Recorded Simultaneous here" is selected.			
Affected item(s): Affidavit (Supplemental)			

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<i>Deed (Personal Representative's - Statutory)</i>			
New/Mod Change	Requested By Heritage Title	Incident No.	TFS No. 768283
Revised to look to the date of probate instead of the recording date field.			
Affected item(s): Deed (Personal Representative's - Statutory)			

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<i>Tax Water and Assessment Agreement (2)</i>			
New/Mod Change	Requested By Heritage Title	Incident No.	TFS No. 768276
Updated fee for taps to \$1,200.00.			
Affected item(s): Tax Water and Assessment Agreement Tax Water and Assessment Agreement (Legal)			

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MY SCREENS

Additional Title Charges Screen

New/Mod Mod	Requested By Phil Clark Kristin Hocker	Incident No.	TFS No.
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Additional Title Charges screen has been modified to show the **Rate Summary Responses** section open by default.

This change is visible when one of the following **My Screens** is selected:

- > **CO-Construction Disb**
- > **CO-Construction Disb FNT**
- > **Co-Escrow**
- > **CO-Title-FNT HT CT CPF**

The screenshot displays the 'Existing Liens/Releases' screen. On the left, a navigation menu is visible with 'Releases' and 'Existing Liens/Releases' highlighted. The main content area features a table titled 'Existing Liens (1)' with the following data:

Priority	Borrower/Mortgagor	Lender/Mortgagee
1		

Below the table, there are form fields for 'Instrument type' (set to Mortgage), 'MERS registration #', and 'Mortgagor/Mortgagee Information' (Given by and In favor of).

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<i>Express Order Entry Screen</i>			
New/Mod Mod	Requested By Karen Benelli	Incident No.	TFS No.

The **smartview Order ID** field has been moved to the bottom of the **Express Order Entry** screen.

This change is visible when one of the following **My Screens** is selected:

- > **CO-Construction Disb**
- > **CO-Construction Disb FNT**
- > **CO-Escrow**
- > **CO-Title-FNT HT CT CPF**

The screenshot shows the 'Express Order Entry' interface. At the top, there are navigation arrows and the title 'Express Order Entry'. On the right, there are links for 'Order Stat' and 'Buyer:'. Below the title, there are several input fields and checkboxes:

- Rush order
- Auto-publish to SoftPro Live
- SoftPro Live template:
- Transaction type:
 - Purchase
 - Refinance
 - Equity
- Commercial
 Construction
 Cash sale
 Out of county
- Order type:
- Product type:
- Policy type:

 A horizontal separator line is present. Below it, there is a 'Notes (0)' section. Further down, there are:

- Ownership profile:
- Office Profile:
- smartVIEW Order ID:** (This field is circled in red in the original image)

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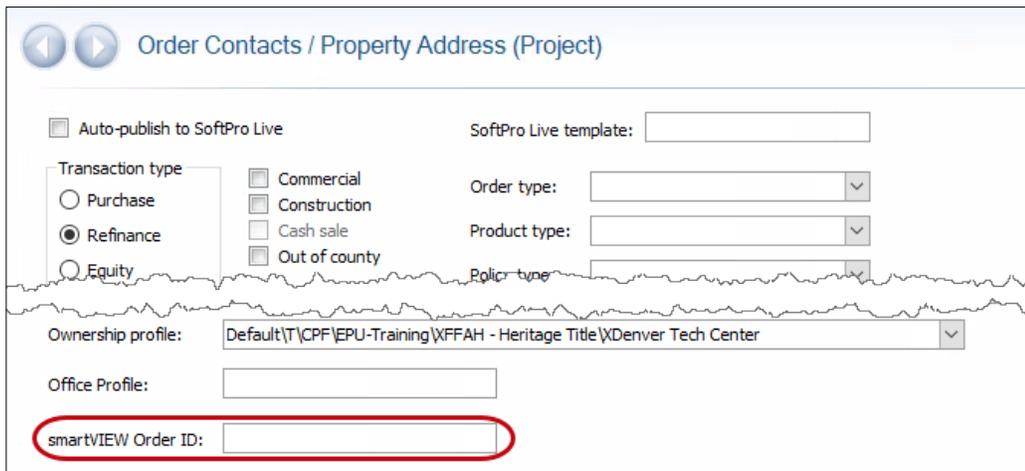
Order Contacts / Property Address (Project) Screen

New/Mod Mod	Requested By Karen Benelli	Incident No.	TFS No.
-----------------------	--------------------------------------	---------------------	----------------

The **smartview Order ID** field has been moved to the bottom of the **Order Contacts / Property Address (Project)** screen.

This change is visible when one of the following **My Screens** is selected:

- > **CO-OPU-FNT**
- > **EPU Screens**



The screenshot shows the 'Order Contacts / Property Address (Project)' screen with the following fields and options:

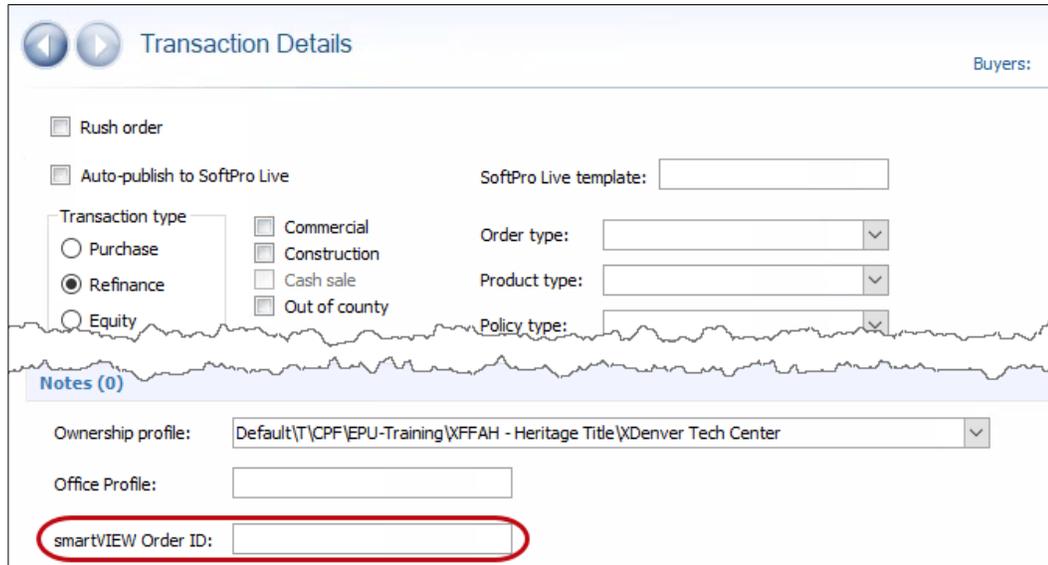
- Auto-publish to SoftPro Live
- SoftPro Live template:
- Transaction type:
 - Purchase
 - Refinance
 - Equity
- Commercial
- Construction
- Cash sale
- Out of county
- Order type:
- Product type:
- Policy type:
- Ownership profile:
- Office Profile:
- smartVIEW Order ID:** (circled in red)

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Transaction Details Screen

New/Mod Mod	Requested By Karen Benelli	Incident No.	TFS No.
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The **smartview Order ID** field has been moved to the bottom of the **Transaction Details** screen.
 This change is visible when the **My Screens > CO-Escrow-FNT** screen is selected.



The screenshot shows the 'Transaction Details' screen with the following fields and options:

- Rush order
- Auto-publish to SoftPro Live
- SoftPro Live template:
- Transaction type:
 - Purchase
 - Refinance
 - Equity
- Commercial
- Construction
- Cash sale
- Out of county
- Order type:
- Product type:
- Policy type:
- Notes (0)
- Ownership profile:
- Office Profile:
- smartVIEW Order ID:** (highlighted with a red circle)

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CONNECTICUT

MY SCREENS

Express Order Entry Screen

New/Mod Mod	Requested By Karen Benelli	Incident No.	TFS No.
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The **smartview Order** field has been moved to the bottom of the **Order Entry** screen.
 This change is visible when the **My Screens > Connecticut Screens** screen is selected.

The screenshot shows the 'Express Order Entry' interface. It includes a 'Rush order' checkbox, a 'Transaction type' section with radio buttons for Purchase, Refinance (selected), and Equity. There are also checkboxes for Commercial, Construction, Cash sale, and Out of county. Three dropdown menus are labeled 'Order type:', 'Product type:', and 'Policy type:'. Below these is a 'Notes (0)' section and an 'Ownership profile:' dropdown menu set to 'Default\Support Mid Atlantic'. At the bottom, the 'smartview Order' field is circled in red.

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DELAWARE

MY SCREENS

Order Entry Screen			
New/Mod Mod	Requested By Karen Benelli	Incident No.	TFS No.
<p>The smartview Order field has been moved to the bottom of the Order Entry screen. This change is visible when the My Screens > DE Commercial screen is selected.</p> <div data-bbox="323 567 1396 1022" data-label="Image"> <p>The screenshot shows the 'Order Entry' form with various fields. At the bottom, the 'smartview Order' field is highlighted with a red circle, indicating its new position.</p> </div>			

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HAWAII

DOCUMENTS

Escrow

<i>Indemnity Agreement (Mechanics' Liens)</i>			
New/Mod Change	Requested By	Incident No.	TFS No.
	FT HI		766469
Updated to reflect most recent version.			
Affected item(s): Indemnity Agreement (Mechanics' Liens)			

[Back to Table of Contents](#)

<i>Letter (Form D.1 - Parties in Possession)</i>			
New/Mod Change	Requested By	Incident No.	TFS No.
	Title Guaranty		768380
Document has been disabled in favor of "Letter (TG Form D.1 – Tenant Leases and Parties in Possession)".			
Affected item(s): Letter (Form D.1 - Parties in Possession)			

[Back to Table of Contents](#)

<i>Letter (HOA Closing - HI)</i>			
New/Mod Change	Requested By	Incident No.	TFS No.
	FT HI		768020
Updated to reflect current phone and email if the forwarding phone and email are not present.			
Affected item(s): Letter (HOA Closing - HI)			

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<i>Letter (TG Form D.1 – Tenant Leases and Parties in Possession)</i>			
New/Mod Change	Requested By	Incident No.	TFS No.
	Title Guaranty		768378
Added custom field prompt for signature section and adjusted to allow users to choose which properties to reflect.			
Affected item(s): Letter (TG Form D.1 – Tenant Leases and Parties in Possession)			

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<i>Letter (Title Endorsement Transmittal)</i>			
New/Mod Change	Requested By	Incident No.	TFS No.
	Title Guaranty		768372
Replaced hard coded text in 2nd paragraph with prompt asking for endorsement.			
Affected item(s): Letter (Title Endorsement Transmittal)			

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ILLINOIS

DOCUMENTS

Escrow

<i>Agreement (Construction Loan)</i>			
New/Mod Change	Requested By IL	Incident No. INC230170411	TFS No. 768256
Added the ability to pull the ALTA 32/33 version.			
Affected item(s): Agreement (Construction Loan)			

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<i>Construction Loan Escrow and Disbursement Agreement</i>			
New/Mod New	Requested By MidWest IT	Incident No.	TFS No. 766471

New document. Please render to view in full.



CONSTRUCTION LOAN ESCROW AND DISBURSEMENT AGREEMENT (GENERIC)

Escrow No.: MS CD 2022 IL FT-JDK

ARTICLE 1: GENERAL INFORMATION

<p>A. Owner/Borrower:</p> <p>Stephen T. Seller and Stephanie T. Seller 100 Property Street, Unit 100A Chicago, IL 60290</p> <p>Email: seller1@email.com</p>	<p>Attorney for Owner/Borrower:</p> <p>The Seller Law Firm 2000 Legal Eagle Way, Suite 2002 Any where, CA 99999</p> <p>Phone No.: (888)789-1000 Fax No.: (888)789-1111 Email: sellerlaw@email.com</p>
<p>B. Lender:</p> <p>Lender Bank & Trust 1000 Big Money Avenue, Suite 1000 Beverly Hills, CA 90210</p>	<p>Contact Person: Larry Lender Phone No.: (800)333-1000 Fax No.: (800)333-1111 Email: LenderBandT@email.com</p>
<p>C. Escrowee:</p> <p>Fidelity National Title Group 1000 Settlement Way, Suite 100 Settlement City, IL 99999</p>	<p>Contact Person: Joseph D Kirby Phone No.: (888)111-5555 Fax No.: (888)111-4321 Email: JKirby@notreal.com</p>
<p>D. Title Insurer:</p> <p>Fidelity National Title Insurance Company 1001 Title Way, Suite 100 Title City, IL 99999</p>	<p>Contact Person: Tammy Title Phone No.: (800)777-2468 Fax No.: (800)777-8642 Email: fnfic@email.com</p>
<p>E. Inspector/Architect</p> <p>Name: _____</p> <p>Address: _____</p> <p>_____</p> <p>_____</p>	<p>Contact Person: _____</p> <p>Phone No.: _____</p> <p>Fax No.: _____</p> <p>Email: _____</p>

Affected item(s):
ILD0567.doc - Construction Loan Escrow and Disbursement Agreement (New)

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<i>Payoff Wire Checklist</i>			
<i>Proceeds Wire Checklist</i>			
New/Mod Change	Requested By CT Metro	Incident No.	TFS No. 767236
Added 'Print Name' and 'Signature' to SENDER CHECKLIST and APPROVED CHECKLIST.			
<p>SENDER CHECKLIST Print Name: _____ Signature: _____</p> <p>Has there been a change to wire instructions? <input type="checkbox"/> Yes <input type="checkbox"/> No</p>			
<p>APPROVED CHECKLIST Print Name: _____ Signature: _____</p> <p><input type="checkbox"/> Sender Checklist completed, verify there has not been a change to wire instructions or a change from</p>			
<p>Affected item(s): Payoff Wire Checklist Proceeds Wire Checklist</p>			

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MINNESOTA

DOCUMENTS

Escrow

<i>Receipt Waiver ML</i>			
New/Mod Change	Requested By Commercial Partners Title	Incident No.	TFS No. 768365
Added legal description.			
Affected item(s): Receipt Waiver ML			

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Title

<i>Endorsement for Underlying Policy</i>			
New/Mod Change	Requested By MN FMIN	Incident No.	TFS No. 769044
A custom field has been added to identify the Mortgage Modification document to be recorded.			

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NEW YORK

DOCUMENTS

Escrow

<i>Cover Letter</i>			
New/Mod Change	Requested By NY	Incident No.	TFS No. 768042
Removed Christine Galvan's contact information and added Melissa Quinones.			
Affected item(s): Cover Letter			

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<i>Letter (Syracuse Transmittal)</i>			
New/Mod Change	Requested By NY	Incident No.	TFS No. 767839
Removed the "Please sign and return" verbiage.			
Affected item(s): Letter (Syracuse Transmittal)			

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<i>Order Confirmation (NCS)</i>									
New/Mod Change	Requested By NCS User Group Request #NCS0037	Incident No.	TFS No. 766964						
Form was revised to remove itemized charges.									
ORDER CONFIRMATION									
<table border="0"> <tr> <td>Title No.:</td> <td>123456789</td> </tr> <tr> <td>Date of Application:</td> <td>March 10, 2023</td> </tr> <tr> <td>Sales Representative:</td> <td>Renee Thornton 2204 Renee.Thornton@softprocorp.com</td> </tr> </table>				Title No.:	123456789	Date of Application:	March 10, 2023	Sales Representative:	Renee Thornton 2204 Renee.Thornton@softprocorp.com
Title No.:	123456789								
Date of Application:	March 10, 2023								
Sales Representative:	Renee Thornton 2204 Renee.Thornton@softprocorp.com								
TRANSACTION INFORMATION									
<table border="0"> <tr> <td>Notes: PreviousOrderNum123</td> <td>Owner Liability: \$499,900.00</td> </tr> </table>				Notes: PreviousOrderNum123	Owner Liability: \$499,900.00				
Notes: PreviousOrderNum123	Owner Liability: \$499,900.00								
Affected item(s): Order Confirmation (NCS)									

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NORTH CAROLINA

MY SCREENS

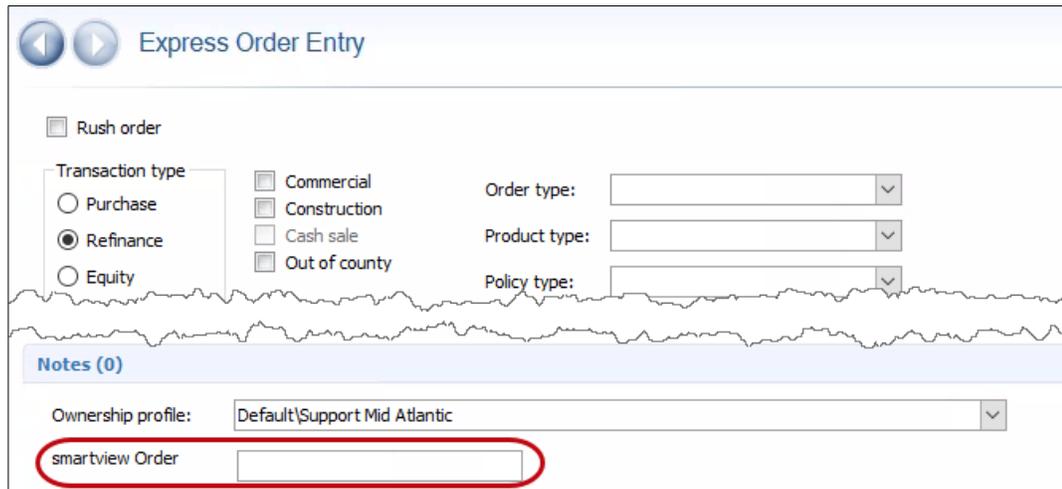
Express Order Entry Screen

New/Mod Mod	Requested By Karen Benelli	Incident No.	TFS No.
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The **smartview Order** field has been moved to the bottom of the **Order Entry** screen.

This change is visible when one of the following **My Screens** is selected:

- > **FT-North Carolina Screens**
- > **North Carolina Screens – Title**
- > **North Carolina Screens – Commercial**
- > **North Carolina Screens – Commercial – CSS**
- > **North Carolina Screens – Escrow**



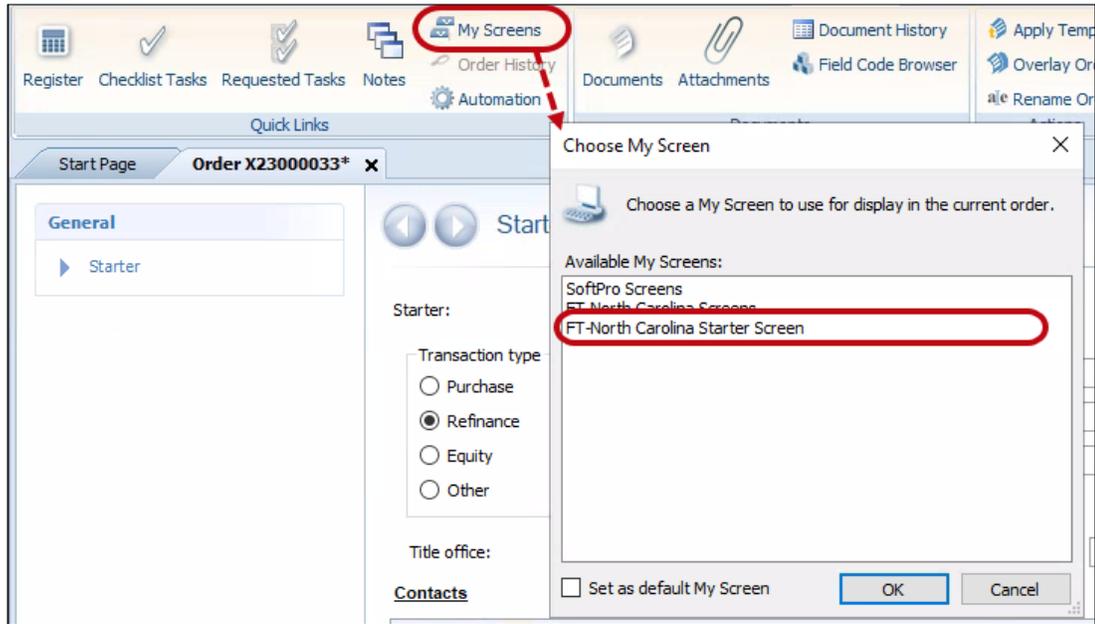
The screenshot shows the 'Express Order Entry' interface. It includes a 'Rush order' checkbox, a 'Transaction type' section with radio buttons for Purchase, Refinance (selected), and Equity. There are also checkboxes for Commercial, Construction, Cash sale, and Out of county. Three dropdown menus are labeled 'Order type:', 'Product type:', and 'Policy type:'. Below these is a 'Notes (0)' section and an 'Ownership profile:' dropdown menu set to 'Default\Support Mid Atlantic'. At the bottom, the 'smartview Order' field is highlighted with a red oval.

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My Screens

New/Mod Mod	Requested By Chris Barbour	Incident No.	TFS No.
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A new **My Screens** has been added: **FT-North Carolina Starter Screen**.



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Starter Screen

New/Mod Mod	Requested By Chris Barbour	Incident No.	TFS No.
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The **Starter** screen has been added to the **General** section.
 This change is visible when the **My Screens > FT-North Carolina Screens** is selected.

The screenshot displays the 'Starter' screen within the 'General' section. The left-hand navigation pane includes 'Express Order Entry', 'Property', 'Order Contacts', and 'Starter' (highlighted with a red circle). The main content area features a 'Starter' dropdown menu, a 'Transaction type' section with radio buttons for Purchase, Refinance, Equity, and Other, and a set of checkboxes for Commercial, Construction, Cash sale, and Out of county. To the right are dropdown menus for Order type, Product type, and Policy type. Below these are fields for Title office and Title officer/Examiner. At the bottom, a 'Contacts' table is shown with columns for Type, Name, Code, Phone, Fax, and Main Contact.

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REPORTS

Starters Report			
New/Mod Change	Requested By Config	Incident No.	TFS No. 767581
Added Sales Rep pick list and removed the Starters Requested column.			
Affected item(s): Starters Report			

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OHIO

DOCUMENTS

Escrow

<i>Affiliated Business Arrangement Disclosure Statement</i>			
New/Mod Change	Requested By ACT Title	Incident No.	TFS No. 768010
Updated to pull contact information.			
<u>Affected item(s):</u> Affiliated Business Arrangement Disclosure Statement			

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OKLAHOMA

DOCUMENTS

Escrow

<i>Signature Replacement (8)</i>			
New/Mod Change	Requested By CT OK	Incident No.	TFS No. 767226
Updated to reflect Alicia Cosby's signature.			
<p><u>Affected item(s):</u> Abstractor's Federal Court Cert Abstractor's Special Certificate Court Check and Interim Title Report Limited New Construction Abstract Certificate UCC and Federal Lien Certificate UCC Certificate Uniform Abstract Certificate (CTI) Written Gap</p>			

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OREGON

DOCUMENTS

Escrow

<i>Affidavit (ALTA)</i>			
<i>Affidavit (ALTA) Legal</i>			
New/Mod Change	Requested By Underwriting Counsel	Incident No.	TFS No. 769121
Documents have been disabled.			
Affected item(s): Affidavit (ALTA) Affidavit (ALTA) Legal			

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<i>Exceptions on Deeds (formatting fix)</i>			
New/Mod Change	Requested By OR	Incident No.	TFS No. 767241
Updated formatting so that when exceptions go to an Exhibit that there is proper spacing after each one.			
Affected item(s): Deed (Personal Representative's) Deed (Personal Representative's) Legal Deed (Statutory Special Warranty - Modified) Deed (Statutory Special Warranty - Modified) Legal Deed (Statutory Special Warranty - REO) Deed (Statutory Special Warranty - REO) Legal Deed (Statutory Special Warranty In Fulfillment of Contract) Deed (Statutory Special Warranty In Fulfillment of Contract) Legal Deed (Statutory Special Warranty) Deed (Statutory Special Warranty) Legal Deed (Statutory Warranty) Deed (Timber) Deed (Timber) Legal			

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PENNSYLVANIA

MY SCREENS

Order Entry Screen

New/Mod Mod	Requested By Karen Benelli	Incident No.	TFS No.
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The **smartview Order** field has been moved to the bottom of the **Order Entry** screen.

This change is visible when one of the following **My Screens** is selected:

- > **PA Commercial**
- > **PA Title and Escrow**
- > **PA Title Only**
- > **Pittsburgh Agency Screens**

The screenshot shows the 'Order Entry' screen with the following fields and options:

- Rush order
- Transaction type:
 - Purchase
 - Refinance
 - Equity
- Commercial
 Construction
 Cash sale
 Out of county
- Order type: [Dropdown]
- Product type: [Dropdown]
- Policy type: [Dropdown]
- Notes (0)
- Ownership profile: Default\Support Mid Atlantic [Dropdown]
- smartview Order** [Text Input Field - circled in red]

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SOUTH CAROLINA

MY SCREENS

Express Order Entry Screen

New/Mod Mod	Requested By Karen Benelli	Incident No.	TFS No.
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The **smartview Order** field has been moved to the bottom of the **Order Entry** screen.
 This change is visible when the **My Screens > South Carolina Screens - Title** screen is selected.

The screenshot shows the 'Express Order Entry' interface. It includes a 'Rush order' checkbox, a 'Transaction type' section with radio buttons for Purchase, Refinance (selected), and Equity. There are also checkboxes for Commercial, Construction, Cash sale, and Out of county. Three dropdown menus are present for Order type, Product type, and Policy type. Below these is a 'Notes (0)' section and an 'Ownership profile' dropdown set to 'Default\Support Mid Atlantic'. At the bottom, the 'smartview Order' field is highlighted with a red circle.

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TEXAS

DOCUMENTS

Escrow

<i>Closed-Canceled Order Information (SWACS)</i>			
New/Mod Change	Requested By SW Agency	Incident No.	TFS No. 768383
Updated the premium amount to look to the Final Premium fields.			
Affected item(s): Closed-Canceled Order Information (SWACS)			

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VIRGINIA / WEST VIRGINIA

MY SCREENS

Express Order Entry Screen

New/Mod Mod	Requested By Karen Benelli	Incident No.	TFS No.
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The **smartview Order** field has been moved to the bottom of the **Order Entry** screen.

This change is visible when one of the following **My Screens** is selected:

- > **VAWV Agency EscrowResi**
- > **VAWV EscrowComm**

The screenshot shows the 'Express Order Entry' interface. It includes a 'Rush order' checkbox, a 'Transaction type' section with radio buttons for Purchase, Refinance (selected), and Equity. There are also checkboxes for Commercial, Construction, Cash sale, and Out of county. Three dropdown menus are present for Order type, Product type, and Policy type. Below these is a 'Notes (0)' section. At the bottom, there is an 'Ownership profile' dropdown set to 'Default\Support Mid Atlantic' and a 'smartview Order' text input field, which is highlighted with a red circle.

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WASHINGTON

DOCUMENTS

Escrow

<i>Master Real Estate Excise Tax Affidavits (2023) (4)</i>			
New/Mod Change	Requested By WA	Incident No.	TFS No. 767843
Updated to reflect changes effective July 1st. Please render to view in full.			
<u>Affected item(s):</u>			
Master Real Estate Excise Tax Affidavit - Exempt (2023)			
Master Real Estate Excise Tax Affidavit (2023)			
Master Real Estate Excise Tax Affidavit (2023) Multiple Affidavits			
Master Real Estate Excise Tax Affidavit (2023) Multiple Location			

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PHRASE(S)

<i>Revised EI Phrase</i>							
New/Mod Change	Requested By CT-Everett	Incident No.	TFS No. 767036				
Revised text:							
<table border="1" style="width: 100%;"> <tr> <td style="width: 15%;">Code ▲</td> <td>Name</td> </tr> <tr> <td>holdbk04</td> <td>HOLDBACK FOR TAX PAYMENT (SELLER)</td> </tr> </table> <p>BEFORE</p> <p>HOLDBACK FOR TAX PAYMENT: Escrow Office Name is hereby instructed to holdback the sum of Two Thousand Five Hundred And No/100 Dollars (\$2,500.00) from Seller proceeds for payment of the 1st half of the 2023 property taxes. Said amount is to be held until such time as the county has posted the tax payment or April 30th - whichever comes first. If the tax payment has not posted by April 30th, Escrow Office Name is instructed to disburse the tax payment to the tax collector with no further responsibility or liability.</p> <p>AFTER</p> <p>HOLDBACK FOR TAX PAYMENT: Escrow Office Name is hereby instructed to holdback the sum of Two Thousand Five Hundred And No/100 Dollars (\$2,500.00) from Seller proceeds for payment of the 1st half of the 2023 property taxes. Said amount is to be held until such time as the county has posted the pending tax payment from the Seller or their reserve account, if applicable. If there is a reserve account and the underlying lender confirms that no payment will be made, Escrow Agent is instructed to disburse the tax payment to the tax collector with no further responsibility or liability.</p>				Code ▲	Name	holdbk04	HOLDBACK FOR TAX PAYMENT (SELLER)
Code ▲	Name						
holdbk04	HOLDBACK FOR TAX PAYMENT (SELLER)						

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WISCONSIN

DOCUMENTS

Escrow

<i>Escrow Instructions (Strict Joint Order #5)</i>			
New/Mod New	Requested By State Counsel	Incident No. INC230187106	TFS No. 768388
New document. Please render to view in full.			
			
<p>Affected item(s): WID0263.doc - Escrow Instructions (Strict Joint Order #5) (New)</p>			

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<i>Seller's Authorization</i>			
New/Mod Change	Requested By Penny Spangler	Incident No. INC230160054	TFS No. 767267
Removed the primary residence logic and left blank check boxes.			
<p>Affected item(s): Seller's Authorization</p>			

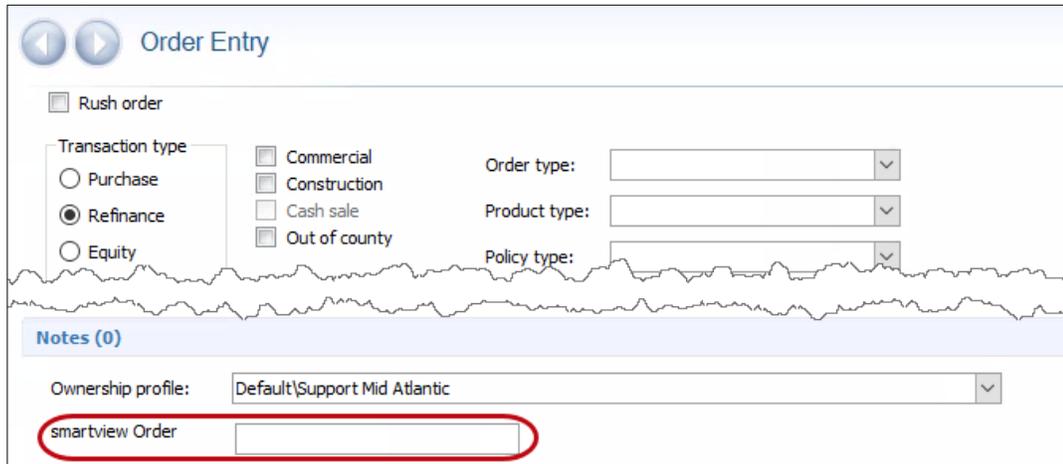
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ALMA AGENCY

MY SCREENS

<i>Order Entry Screen</i>			
New/Mod Mod	Requested By Karen Benelli	Incident No.	TFS No.

The **smartview Order** field has been moved to the bottom of the **Order Entry** screen.
 This change is visible when the **My Screens > ALMA** screen is selected.



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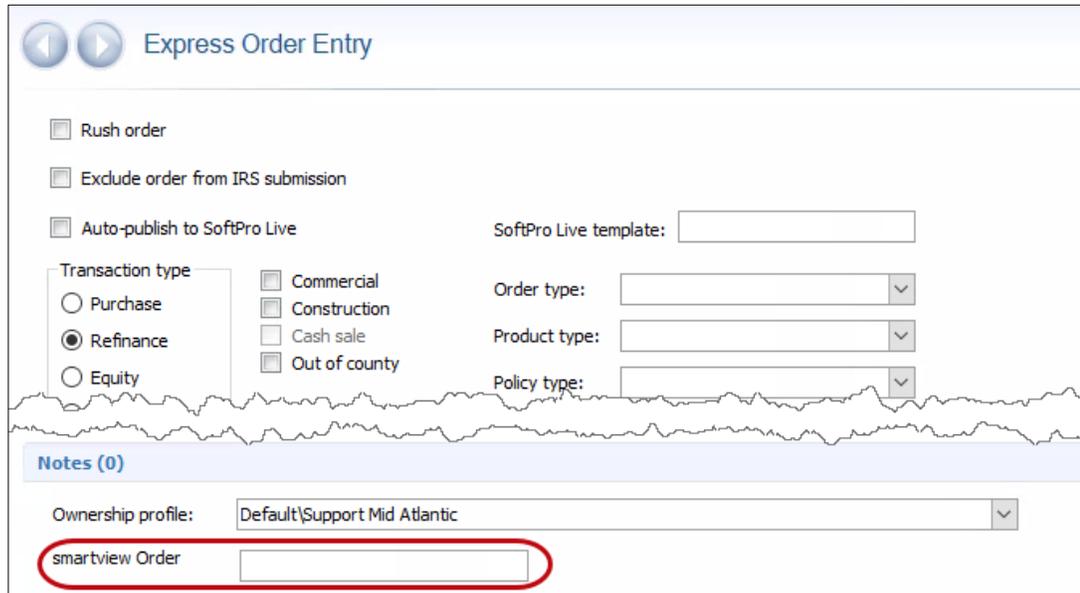
FNTG MARYLAND

MY SCREENS

Express Order Entry Screen

New/Mod Mod	Requested By Karen Benelli	Incident No.	TFS No.
-----------------------	--------------------------------------	---------------------	----------------

The **smartview Order** field has been moved to the bottom of the **Order Entry** screen.
 This change is visible when the **My Screens > FNT-Maryland CSS** screen is selected.



The screenshot shows the 'Express Order Entry' interface. It includes several sections:

- Checkboxes:** 'Rush order', 'Exclude order from IRS submission', and 'Auto-publish to SoftPro Live'.
- SoftPro Live template:** A text input field.
- Transaction type:** Radio buttons for 'Purchase', 'Refinance' (selected), and 'Equity'.
- Order type:** A dropdown menu.
- Product type:** A dropdown menu.
- Policy type:** A dropdown menu.
- Additional checkboxes:** 'Commercial', 'Construction', 'Cash sale', and 'Out of county'.
- Notes (0):** A section with a blue header.
- Ownership profile:** A dropdown menu showing 'Default\Support Mid Atlantic'.
- smartview Order:** A text input field at the bottom, which is circled in red in the original image.

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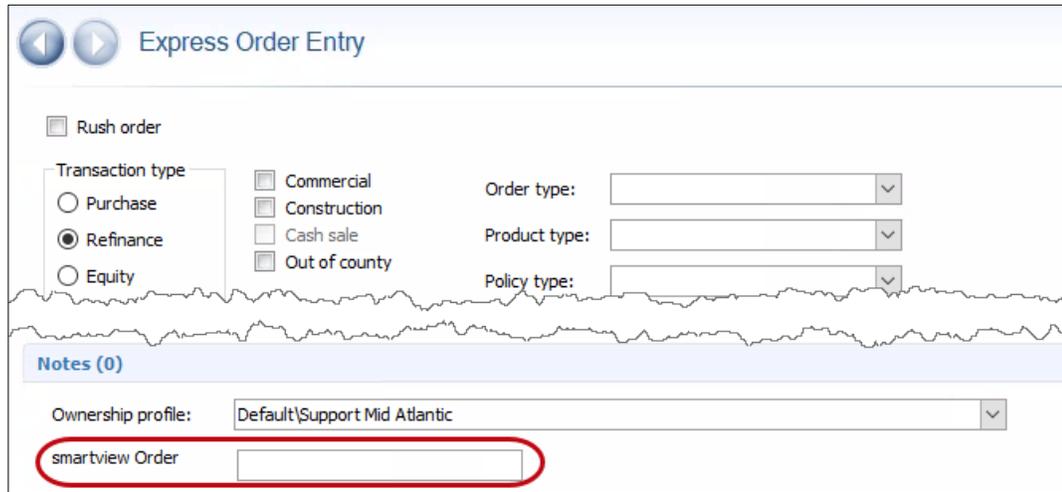
GEORGIA AGENCY

MY SCREENS

Express Order Entry Screen

New/Mod Mod	Requested By Karen Benelli	Incident No.	TFS No.
-----------------------	--------------------------------------	---------------------	----------------

The **smartview Order** field has been moved to the bottom of the **Order Entry** screen.
 This change is visible when the **My Screens > GA Agency Screens** screen is selected.



The screenshot shows the 'Express Order Entry' interface. It includes a 'Rush order' checkbox, a 'Transaction type' section with radio buttons for Purchase, Refinance (selected), and Equity. There are also checkboxes for Commercial, Construction, Cash sale, and Out of county. To the right are dropdown menus for Order type, Product type, and Policy type. Below these is a 'Notes (0)' section and an 'Ownership profile' dropdown set to 'Default\Support Mid Atlantic'. At the bottom, the 'smartview Order' field is highlighted with a red oval.

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LIBERTY TITLE

REPORTS

Pull Through Report - FNF UG # 260			
New/Mod New	Requested By Liberty Title/Rob Lailer	Incident No.	TFS No. 757042
New report for Liberty Title.			
Affected item(s): SSCORP5579.rpt_Pull Through (New)			

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MAINE AGENCY

MY SCREENS

Order Entry Screen

New/Mod Mod	Requested By Karen Benelli	Incident No.	TFS No.
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The **smartview Order** field has been moved to the bottom of the **Order Entry** screen.
 This change is visible when the **My Screens > Maine Agency Screens** screen is selected.

The screenshot shows the 'Order Entry' screen with the following fields:

- Transaction type:**
 - Purchase
 - Refinance
 - Equity
- Commercial
- Construction
- Cash sale
- Out of county
- Order type:** [Dropdown menu]
- Product type:** [Dropdown menu]
- Policy type:** [Dropdown menu]
- Notes (0)**
- Ownership profile:** [Dropdown menu] Default\Support Mid Atlantic
- smartview Order:** [Text input field, highlighted with a red circle]

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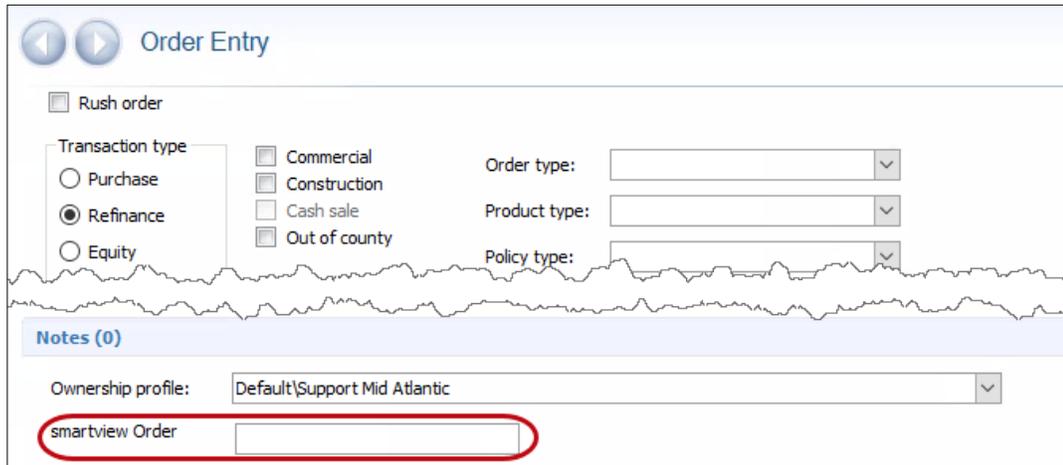
MASSACHUSETTS AGENCY

MY SCREENS

Order Entry Screen

New/Mod Mod	Requested By Karen Benelli	Incident No.	TFS No.
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The **smartview Order** field has been moved to the bottom of the **Order Entry** screen.
 This change is visible when the **My Screens > MA Agency Screens** screen is selected.



The screenshot shows the 'Order Entry' screen with the following fields and options:

- Rush order
- Transaction type:
 - Purchase
 - Refinance
 - Equity
- Commercial
 Construction
 Cash sale
 Out of county
- Order type:
- Product type:
- Policy type:
- Notes (0)
- Ownership profile:
- smartview Order** (This field is circled in red in the original image)

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NE AGENCY

MY SCREENS

Express Order Entry Screen

New/Mod Mod	Requested By Karen Benelli	Incident No.	TFS No.
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The **smartview Order** field has been moved to the bottom of the **Order Entry** screen.
This change is visible when the **My Screens > NE Title-Escrow Screens** screen is selected.

The screenshot shows the 'Express Order Entry' form. It includes a 'Transaction type' section with radio buttons for Purchase, Refinance (selected), and Equity. There are checkboxes for Commercial, Construction, Cash sale, and Out of county. Below these are dropdown menus for Order type, Product type, and Policy type. At the bottom, there is an 'Ownership profile' dropdown set to 'Default\Support Mid Atlantic' and a 'smartview Order' text input field, which is circled in red to highlight the change.

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Order Entry Screen

New/Mod Mod	Requested By Karen Benelli	Incident No.	TFS No.
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The **smartview Order** field has been moved to the bottom of the **Order Entry** screen.
This change is visible when the **My Screens > NE Agency - Disb** screen is selected.

The screenshot shows the 'Order Entry' form. It includes a 'Transaction type' section with radio buttons for Purchase, Refinance (selected), and Equity. There are checkboxes for Commercial, Construction, Cash sale, and Out of county. Below these are dropdown menus for Order type, Product type, and Policy type. At the bottom, there is an 'Ownership profile' dropdown set to 'Default\Support Mid Atlantic' and a 'smartview Order' text input field, which is circled in red to highlight the change.

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NOVARE NATIONAL SETTLEMENT SERVICES

DOCUMENTS

Escrow

<i>Cover Letter (Reasonable and Customary Fees)</i>			
New/Mod New	Requested By Novare	Incident No.	TFS No. 768032
New document. Please render to view in full.			
 Fidelity National Title <div style="float: right; text-align: right;"> 236 Quarry Road City1, CA 99999 Phone: (800)777-4444 / Fax: (800)444-7777 </div>			
<p>Dated: May 23, 2023</p> <p>Please note that I have reviewed the subject property closing and particularly the settlement statement fees for closing coordination as charged by Fidelity National Title Insurance Company as an example of the REO closings we have closed for Darrell Lee, Aaron Lee and Seller Trust. I have concluded that the closing coordination fees are reasonable and historically customary for the services provided.</p> <p>If you should have any additional questions regarding the fees being charged by Fidelity National Title Insurance Company, please feel free to contact me to discuss further.</p> <p>Sincerely,</p> <p><i>Joseph D Kirby</i> Joseph D Kirby Title Examiner JKirby@notreal.com</p>			
<p>Affected item(s): NOVD1229.doc - Cover Letter (Reasonable and Customary Fees) (New)</p>			

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REPORTS

Transaction Form			
New/Mod Change	Requested By NOV / Config	Incident No.	TFS No. 765719
Added the digital signature of the person who prints the form for the Incoming Wire/Direct Deposit Confirmation.			
Affected item(s): Transaction Form			

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Trial Balance – Closed			
New/Mod Change	Requested By Novare	Incident No.	TFS No. 768333
Updated to show orders based on closed status, not WSOB definition.			
Affected item(s): Trial Balance – Closed			

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RHODE ISLAND AGENCY

MY SCREENS

Express Order Entry Screen

New/Mod Mod	Requested By Karen Benelli	Incident No.	TFS No.
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The **smartview Order** field has been moved to the bottom of the **Order Entry** screen.
 This change is visible when the **My Screens > Rhode Island Agency** screen is selected:

The screenshot shows the 'Express Order Entry' interface. It includes a 'Rush order' checkbox, a 'Transaction type' section with radio buttons for Purchase, Refinance (selected), and Equity. There are also checkboxes for Commercial, Construction, Cash sale, and Out of county. Three dropdown menus are labeled 'Order type:', 'Product type:', and 'Policy type:'. Below these is a 'Notes (0)' section and an 'Ownership profile:' dropdown menu set to 'Default\Support Mid Atlantic'. At the bottom, the 'smartview Order' field is highlighted with a red oval.

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TECHNICAL NOTES (FOR LOCAL IT/SUPPORT)

Any new documents or reports 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 or reports 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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