

# 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

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Escrow

*Closing Letter (8)*

<b>New/Mod</b> Change	<b>Requested By</b> Softpro User Group #21	<b>Incident No.</b>	<b>TFS No.</b> 769503
--------------------------	--------------------------------------------------	---------------------	--------------------------

Added an option to choose Via Courier, Via Standard Mail or Via Overnight Mail above the addressee.

**Date:** June 1, 2023  
**Escrow No.:** JM CD Test 2023-MGS  
**Borrower(s):** Bryan B. Buyer and Brenda B. Buyer  
**Seller(s):** Samuel S. Seller and Samantha S. Seller  
**Property:** 100 Property Avenue  
 Property City, CA 55555

**Affected item(s):**  
 Closing Letter  
 Closing Letter (Selling Agent-Broker)  
 Closing Letter (Buyer-Borrower)  
 Closing Letter (Lender)  
 Closing Letter (Listing Agent-Broker)  
 Closing Letter (Mortgage Broker)  
 Closing Letter (Multiple Agents)  
 Closing Letter (Seller)

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*Settlement Statements (CDF/HUD)*

<b>New/Mod</b> Change	<b>Requested By</b> Config	<b>Incident No.</b>	<b>TFS No.</b> 762663
--------------------------	-------------------------------	---------------------	--------------------------

Updated to sort proration lines to show County Taxes first, followed by City, Assessments, any additional prorations, etc.

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Title

<a href="#">ALTA JR1 - Residential Limited Coverage</a>			
New/Mod Change	Requested By	Incident No.	TFS No.
	CA FT San Diego		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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<a href="#">2021 ALTA Commitments, Policies, Endorsements</a>			
New/Mod Change	Requested By	Incident No.	TFS No.
	FNTG Form Filing		716428
<p>The following new 2021 ALTA title products are being made available (if applicable*) for issuance in SoftPro Select for states where the forms have been filed: (For states that file with modifications, these will be available 'w-[ST] Mod'.)</p> <ul style="list-style-type: none"> <li>· ALTA Commitment 2021</li> <li>· ALTA Short Form Commitment 2021*</li> <li>· ALTA Owner's Policy 2021</li> <li>· ALTA Homeowner's Policy of Title Insurance 2021</li> <li>· ALTA Loan Policy 2021</li> <li>· ALTA Expanded Coverage Residential Loan Policy-Assessments Priority 2021*</li> <li>· ALTA Expanded Coverage Residential Loan Policy-Current Assessments 2021*</li> <li>· ALTA Short Form Expanded Coverage Residential Loan Policy-Assessments Priority 2021*</li> <li>· ALTA Short Form Expanded Coverage Residential Loan Policy-Current Assessments 2021*</li> <li>· ALTA Short Form Residential Loan Policy-Assessments Priority 2021*</li> <li>· ALTA Short Form Residential Loan Policy-Current Assessments 2021*</li> <li>· Multiple corresponding 2021 ALTA revised Endorsements</li> <li>· New ALTA 34.1 - Identified Exception &amp; Identified Risk Coverage Endorsement</li> <li>· New ALTA 47 series - Operative Law Endorsements*</li> </ul> <p>*Note: Several ALTA Expanded and Short Form products are being made available only as approved by individual states' underwriting counsel.</p> <p>Endorsement Note: For purposes of enabling the appropriate Custom Fields to be displayed for each of the new 2021 version endorsements, the "-06" designation will continue to appear in the Code field only. This is a technical requirement only and the "-06" will not appear in the Description or print anywhere on the 2021 version endorsement forms.</p>			

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REPORTS

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

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

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

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

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Outstanding Checks			
<b>New/Mod</b> Change	<b>Requested By</b> CO HTC Admin	<b>Incident No.</b>	<b>TFS No.</b> 769800
Added the Payee code to be concatenated with the Payee PDF. New Payee Code column, Excel export.			
<b>Affected item(s):</b> Outstanding Checks			

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Posted Wires/Processed WMA			
<b>New/Mod</b> Change	<b>Requested By</b> FNT LA OAC	<b>Incident No.</b>	<b>TFS No.</b> 768039
Added the option to group by 'Bank.' When this grouping is selected, the Bank column will be replaced with the Reference Number column.			
<b>Affected item(s):</b> Posted Wires/Processed WMA			

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SPAdmin-Custom Source of Business Export and Missing Fields			
New/Mod Change	Requested By	Incident No.	TFS No.
	RMSS FNTG Admin		767554
Updated the County Operation name for:  FKCO = TTC/CTI KENNEWICK FKRE = TTC/CTI KENNEWICK  <b>Affected item(s):</b> SSCORP5255.rpt – SPAdmin-Custom Source of Business Export SSCORP5268.rpt – SPAdmin-Custom Source of Business Export-Missing Fields			

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ARIZONA

DOCUMENTS

Escrow

*Closing Letter (8)*

<b>New/Mod</b> Change	<b>Requested By</b> Softpro User Group #21	<b>Incident No.</b>	<b>TFS No.</b> 769518
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Added an option to choose Via Courier, Via Email, Via Overnight, or Via Standard Mail above the addressee.

100 Escrow Office Street  
EO City, CA 54545  
Phone: (800)777-4444 / Fax (800)444-7777

**Date:** June 1, 2023  
**Escrow No.:** JM CD Test 2023-MGS  
**Borrower(s):** Bryan B. Buyer and Brenda B. Buyer  
**Seller(s):** Samuel S. Seller and Samantha S. Seller  
**Property:** 100 Property Avenue  
Property City, CA 55555

**Via Standard Mail**  
Samuel S. Seller and Samantha S. Seller  
123 Seller Fwd Street  
Slr Fwd City, CA 55555

**Affected item(s):**  
Closing Letter  
Closing Letter (Buyer-Borrower)  
Closing Letter (Lender)  
Closing Letter (Listing Agent-Broker)  
Closing Letter (Mortgage Broker)  
Closing Letter (Seller)  
Closing Letter (Selling Agent-Broker)

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*Letter (Equifax Credit Watch)*

<b>New/Mod</b> Change	<b>Requested By</b> LT Arizona	<b>Incident No.</b>	<b>TFS No.</b> 768296
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Hyperlink revised:

- Lost Wallet Assistance, if your wallet is lost or stolen, and one-stop assistance in canceling and reissuing credit, debit and personal identification cards.

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:

Redemption URL: <http://www.equifax.com/activate/>  
Activation Code(s): 12345

**Affected item(s):**  
Letter (Equifax Credit Watch)

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Title

<a href="#">ALTA Commitments (2)</a>			
<b>New/Mod</b> Change	<b>Requested By</b> CTI AZ FNTG-Phoenix	<b>Incident No.</b>	<b>TFS No.</b> 769411
Schedule B, Part I - Requirements has been updated to automatically include the following item: 6. Compliance with Company policies relating to absentee owners, if applicable.			
Note: Order templates will be updated so user added Requirements will now begin with number 7.			
<b>Affected item(s):</b> ALTA Commitment 2016 (AZ) ALTA Commitment 2021 (AZ)			

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

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REPORTS

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

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<a href="#">Opened/Closed/Canceled Orders by Reps w/Agents</a>			
<b>New/Mod Change</b>	<b>Requested By</b> FNT Agency Admin	<b>Incident No.</b>	<b>TFS No.</b> 765752
Added Revenue data.			
<b>Affected item(s):</b> Opened/Closed/Canceled Orders by Reps w/Agents			

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CALIFORNIA

DOCUMENTS

Escrow

<a href="#">Bulk - Notice to Creditors &amp; Intention to Transfer AB</a>			
<b>New/Mod</b> Change	<b>Requested By</b> State Counsel	<b>Incident No.</b>	<b>TFS No.</b> 769870
Seller Signatures have been removed per State Counsel instruction.			
<b>Affected item(s):</b> Bulk - Notice to Creditors & Intention to Transfer AB			

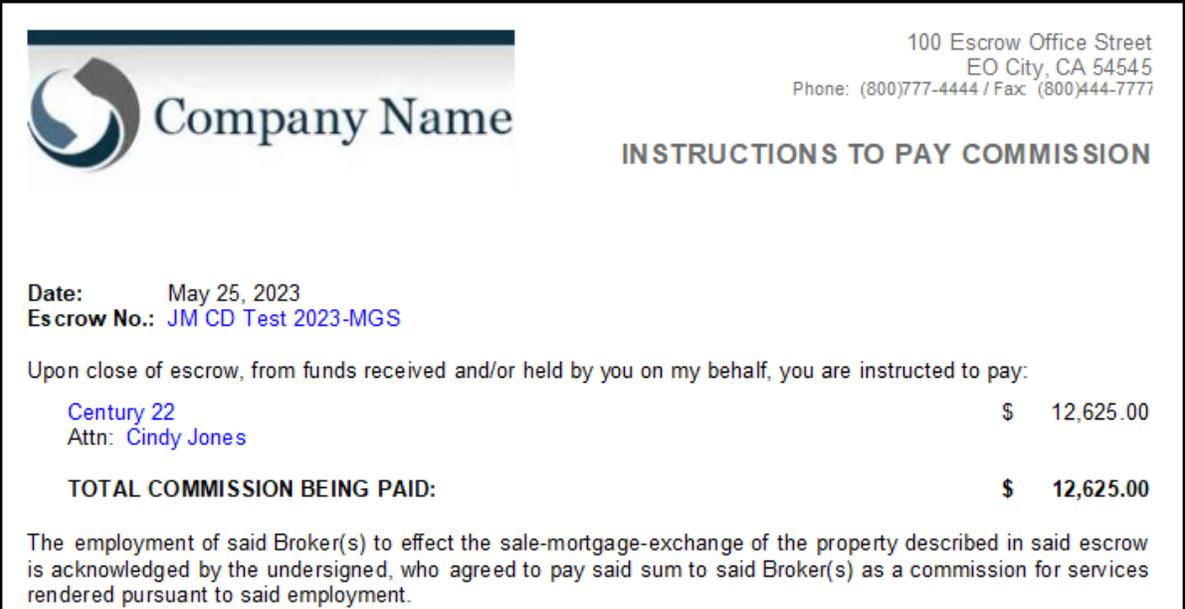
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<a href="#">Closing Disclosures</a>			
<b>New/Mod</b> Change	<b>Requested By</b> TT LA / Config	<b>Incident No.</b>	<b>TFS No.</b> 768411
For TT LA, the header name will pull from the SA name short field.			
<b>Affected item(s):</b> Borrower Closing Disclosure Form (CDF) Borrower Closing Disclosure Form (CDF) Buyer Closing Disclosure Form (CDF) Buyer Closing Disclosure Form (CDF) Closing Disclosure Form (CDF) Closing Disclosure Form (CDF) Seller Closing Disclosure Form (CDF) Seller Closing Disclosure Form (CDF)			

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<a href="#">Closing Letter (8)</a>			
<b>New/Mod</b> Change	<b>Requested By</b> Softpro User Group #21	<b>Incident No.</b>	<b>TFS No.</b> 769518
Added an option to choose Via Courier, Via Email, Via Overnight, or Via Standard Mail above the addressee.			
<b>Affected item(s):</b> Closing Letter Closing Letter (Buyer-Borrower) Closing Letter (Lender) Closing Letter (Listing Agent-Broker) Closing Letter (Mortgage Broker) Closing Letter (Seller) Closing Letter (Selling Agent-Broker)			

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<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.									
 <p><b>INSTRUCTIONS TO PAY COMMISSION</b></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 border="0"> <tr> <td>Century 22</td> <td style="text-align: right;">\$ 12,625.00</td> </tr> <tr> <td>Attn: Cindy Jones</td> <td></td> </tr> <tr> <td><b>TOTAL COMMISSION BEING PAID:</b></td> <td style="text-align: right;"><b>\$ 12,625.00</b></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	\$ 12,625.00	Attn: Cindy Jones		<b>TOTAL COMMISSION BEING PAID:</b>	<b>\$ 12,625.00</b>
Century 22	\$ 12,625.00								
Attn: Cindy Jones									
<b>TOTAL COMMISSION BEING PAID:</b>	<b>\$ 12,625.00</b>								
<b>Affected item(s):</b> SCA0002987.doc - Commission Instruction (New)									

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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.			
<b>Affected item(s):</b> Daily Recording Sheet			

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<i>MH Park Request</i>			
<b>New/Mod Change</b>	<b>Requested By</b> FNT Alameda Contra Costa	<b>Incident No.</b>	<b>TFS No.</b> 767837
Added new question.			
<div style="border: 1px solid black; padding: 5px;"> <p><b>NEW OWNER INFORMATION:</b>     <a href="#">Bryan B. Buyer</a> and <a href="#">Brenda B. Buyer</a></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: <a href="#">June 2, 2023</a></p> </div>			
<b>Affected item(s):</b> MH Park Request			

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<i>Note Installment (Interest Included)</i>			
<b>New/Mod Change</b>	<b>Requested By</b> CT SoCal	<b>Incident No.</b>	<b>TFS No.</b> 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 <a href="#">Escrow Office Name</a>, a <a href="#">California</a> corporation, herein called Trustee <b>and is given and accepted as a portion of the purchase price.</b></p> </div>			
<b>Affected item(s):</b> 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><a href="https://www.boe.ca.gov/proptaxes/pdf/sample-boe502a.pdf">https://www.boe.ca.gov/proptaxes/pdf/sample-boe502a.pdf</a></p> <p><b>Affected item(s):</b>            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><b>Affected item(s):</b>            Policy Writeup</p>			

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<i>Settlement Statements (CDF)</i>			
New/Mod Change	Requested By	Incident No.	TFS No.
	TT LA / Config		768361
<p>For TT LA, the text "Title -" will be removed when the CDF file is marked as commercial. Also, the name to show in the header will be TT LA SA short name.</p> <p><b>Affected item(s):</b>            Individual Settlement Statement, Legal (CDF)            Individual Settlement Statement, Letter (CDF)            Settlement Statements</p>			

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<i>Settlement Statements (CDF/HUD)</i>			
New/Mod Change	Requested By Config	Incident No.	TFS No. 764699
CDF/HUD settlement statements are available in the tree as "Final" which will default the status to "Final" status.			
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.			
<b>Affected item(s):</b> Settlement Statements			

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<i>Signing Confirmations (2)</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.			
<b>Affected item(s):</b> Buyer Signing Confirmation Seller 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.				
<b>ESCROW STATUS SHEET</b>				
<p>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</p> <p>Seller(s): Samuel S. Seller and Samantha S. Seller            Address: 1 Seller Crmt Address, Seller Crmt City, CA 32852            Home Phone: (409)222-3334      Business: (409)333-2222      Cell: (409)444-5555            Email: Seller1Email@email.com</p> <p>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</p> <p>Title Co.: Title Office Name            Title Officer: Joseph D Kirby</p>				
	NEED	Requested or Prepared	Received	REMARKS
Initial Deposit Check / Credit Card / Wire				
Tax Clearance				
Title Insurance Prelim				
Estoppel				
<b>Affected item(s):</b> SCA0002988.doc - Status Sheet (New)				

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Title

<i>CLTA Preliminary Report (3)</i>			
<b>New/Mod</b> Change	<b>Requested By</b> FNT Los Angeles	<b>Incident No.</b>	<b>TFS No.</b> 767157
Per CA State Counsel, removing the word "FORM" from the header of the Preliminary Report.			
<div style="border: 1px solid black; padding: 10px;"> <p><b>PRELIMINARY REPORT</b></p> <hr/> <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <p>Issued By:</p>  </div> <div style="width: 45%; text-align: right;"> <p>Prelim Number:</p> <div style="border: 1px solid black; padding: 10px; width: fit-content; margin: 0 auto;"> <p><b>COM111111</b></p> </div> </div> </div> </div>			
<p><b>Affected item(s):</b>            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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MY SCREENS

*Order Contacts / Property Address (Project) Screen*

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

<b>New/Mod</b> Mod	<b>Requested By</b> Karen Benelli	<b>Incident No.</b>	<b>TFS No.</b>
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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' screen with the following fields:

- Transaction type:
  - Purchase
  - Refinance
  - Equity
  - Other
- Commercial  
 Construction  
 Cash sale  
 Out of county
- Order type:
- Product type:
- Policy type:

Below the form is a 'Notes (0)' section with an 'Ownership profile' dropdown set to 'Default\Support - ILWI'. At the bottom, the 'smartview Order No.' field is highlighted with a red circle.

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

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' interface. At the bottom of the form, there is a section for 'Notes (0)'. Below the notes, there is a dropdown menu for 'Ownership profile' set to 'Default\Support - CA'. At the very bottom, the 'smartview Order No.' field is highlighted with a red oval, indicating its new position.

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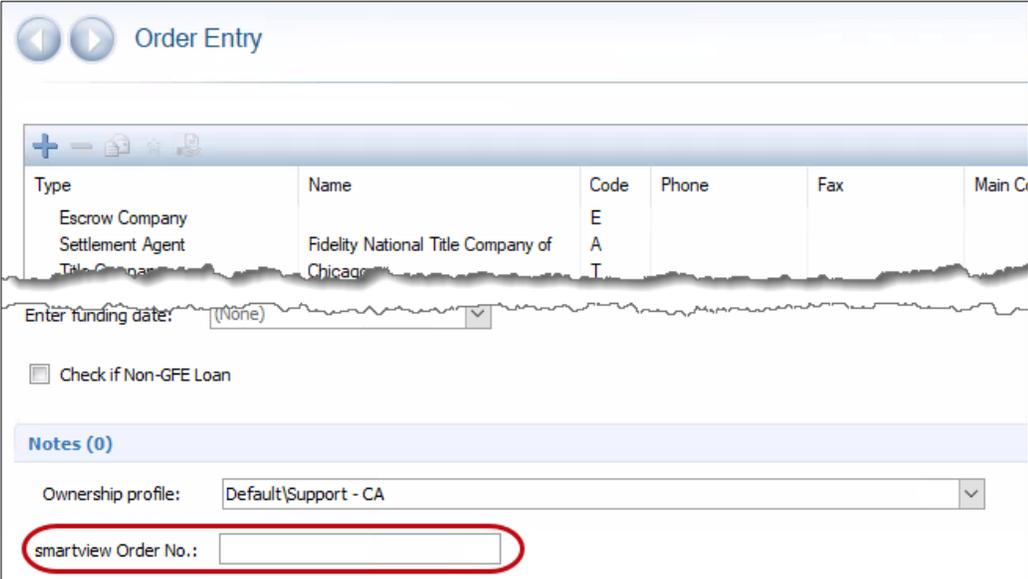
*Order Entry Screen*

<b>New/Mod</b> Mod	<b>Requested By</b> Karen Benelli	<b>Incident No.</b>	<b>TFS No.</b>
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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 bottom, the 'smartview Order No.' field is highlighted with a red circle. The interface includes a table with columns: Type, Name, Code, Phone, Fax, and Main C. The table contains one row: Escrow Company, Fidelity National Title Company of Chicago, E, A, T. Below the table are fields for 'Enter funding date:' (set to '(None)'), a checkbox for 'Check if Non-GFE Loan', a 'Notes (0)' section, and an 'Ownership profile:' dropdown menu set to 'Default\Support - CA'.

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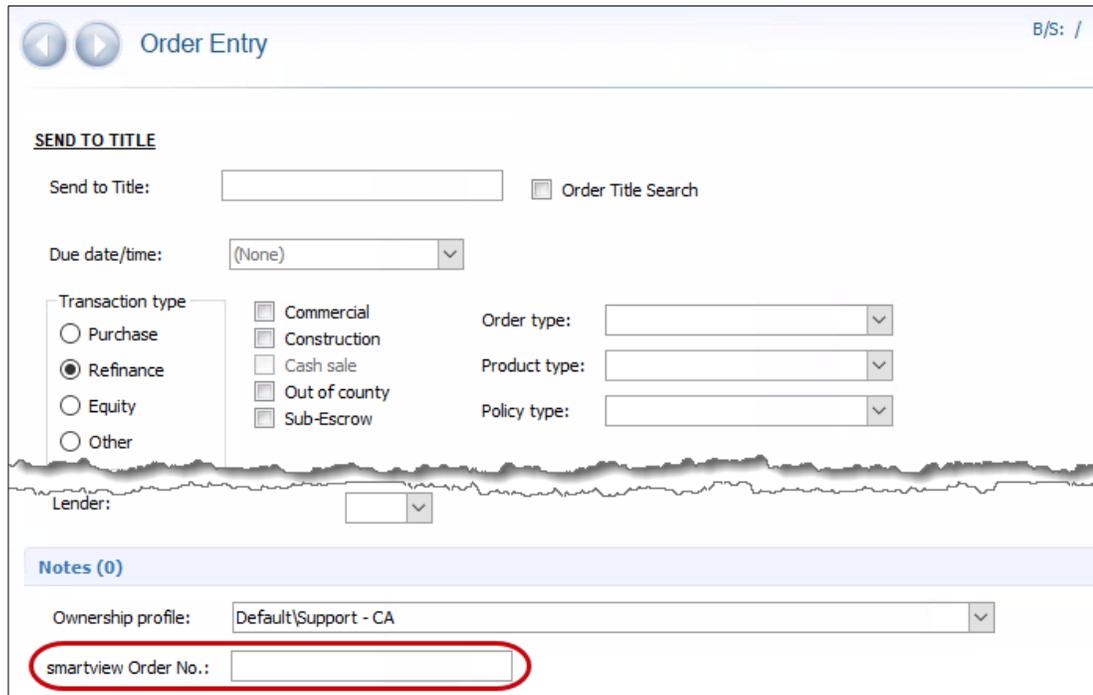
[Open Order Entry](#)

<b>New/Mod</b> Mod	<b>Requested By</b> Karen Benelli	<b>Incident No.</b>	<b>TFS No.</b>
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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' interface. At the bottom of the form, the 'smartview Order No.' field is highlighted with a red circle. Other visible fields include '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)', and 'Ownership profile'.

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*Supplemental Report Screen*

<b>New/Mod</b> Mod	<b>Requested By</b> Karen Benelli	<b>Incident No.</b>	<b>TFS No.</b>
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A new custom field, Original Preliminary Report Date (if other than Effective Date), has been added to the bottom of the **Supplemental Report** screen.

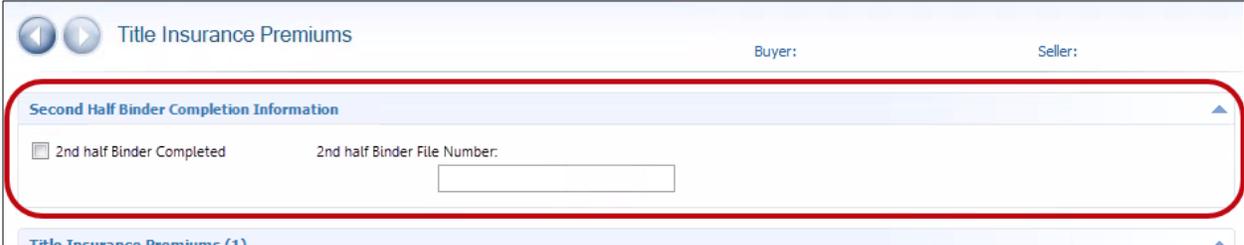
This change is visible when one of the following **My Screens** is selected:

- > **SoCal Title Screens Impact to SPS**
- > **SoCal Title Screens Impact to SPS TT**

The screenshot shows the 'Order Entry' interface with the following elements:

- Navigation arrows and 'Order Entry' title.
- Checkbox:  Auto-publish to SoftPro Live
- Text field: SoftPro Live template: [ ]
- Transaction type section:
  - Purchase
  - Refinance
  - Equity
  - Other
- Additional transaction types:
  - Commercial
  - Construction
  - Cash sale
  - Out of county
- Order type: [ ]
- Product type: [ ]
- Policy type: [ ]
- Notes (0) section with Ownership profile: Default\Support - CA
- smartview Order No.:** [ ] (highlighted with a red circle)

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<i>Title Insurance Premiums Screen</i>			
New/Mod	Requested By	Incident No.	TFS No.
Mod	Karen Benelli		
<p>The <b>Title Insurance Premiums</b> screen has been modified to include the <b>Second Half Binder Completion Information</b> section. The new section includes a:</p> <ul style="list-style-type: none"> <li>&gt; <b>2<sup>nd</sup> half Binder Completed check box</b></li> <li>&gt; <b>2<sup>nd</sup> half Binder File Number field</b></li> </ul> <p>This change is visible when one of the following <b>My Screens</b> is selected:</p> <ul style="list-style-type: none"> <li>&gt; <b>CA – Foreclosure Dept</b></li> <li>&gt; <b>CA – Commercial</b></li> <li>&gt; <b>CA – Commercial CSS</b></li> <li>&gt; <b>Northern CA – All Screens</b></li> <li>&gt; <b>Northern CA – Commercial Screens</b></li> <li>&gt; <b>Northern CA – DSC Screens</b></li> <li>&gt; <b>Northern CA – EPU Screens</b></li> <li>&gt; <b>Northern CA – Escrow Screens</b></li> <li>&gt; <b>Northern CA – FT SAC Commercial 010</b></li> <li>&gt; <b>Northern CA – Policy Screens</b></li> <li>&gt; <b>Northern CA – RLC Screens</b></li> <li>&gt; <b>Northern CA – Title Screens</b></li> <li>&gt; <b>PIRT Title</b></li> <li>&gt; <b>SoCal All Screens</b></li> <li>&gt; <b>SoCal Commercial Screens</b></li> <li>&gt; <b>SoCal Escrow Screens</b></li> <li>&gt; <b>SoCal Out of State Orders</b></li> <li>&gt; <b>SoCal Payoff Screens</b></li> <li>&gt; <b>SoCal Policy Screens</b></li> <li>&gt; <b>SoCal Production Screens</b></li> <li>&gt; <b>SoCal Sub Escrow Screens</b></li> <li>&gt; <b>SoCal Title Screens</b></li> </ul>			
			

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PHRASE(S)

<i>Revised EI Phrase</i>								
<b>New/Mod Change</b>	<b>Requested By</b> CA	<b>Incident No.</b>	<b>TFS No.</b> 770603					
Prompt replaced:								
<table border="1" style="width: 100%;"> <tr> <td style="width: 15%;">Code</td> <td style="width: 45%;">Name</td> <td rowspan="2" style="text-align: center; vertical-align: middle;"><b>Replaced prompt to pull in the Sales Price</b></td> </tr> <tr> <td>amend05</td> <td>AMENDED PURCHASE PRICE/SALESPRICE/CONSIDERATION</td> </tr> </table> <p><b>AMENDED PURCHASE PRICE:</b> Seller and Buyer hereby authorize and instruct Escrow Holder to amend the purchase price herein to <b>Seven Hundred Fifty Thousand And No/100 Dollars (\$750,000.00).</b></p> <p>Escrow Holder is further instructed to adjust all applicable costs and expenses calculated upon the basis of the purchase price including but not limited to the following: commission, owner's title policy premium, escrow fee, documentary transfer tax, etc.</p>				Code	Name	<b>Replaced prompt to pull in the Sales Price</b>	amend05	AMENDED PURCHASE PRICE/SALESPRICE/CONSIDERATION
Code	Name	<b>Replaced prompt to pull in the Sales Price</b>						
amend05	AMENDED PURCHASE PRICE/SALESPRICE/CONSIDERATION							

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<i>Revised EI Phrase</i>									
<b>New/Mod Change</b>	<b>Requested By</b> Ticor	<b>Incident No.</b>	<b>TFS No.</b> 770000						
Revised text:									
<table border="1" style="width: 100%;"> <tr> <td style="width: 15%;">Code</td> <td style="width: 45%;">Name</td> <td></td> </tr> <tr> <td>prop02</td> <td>PROPERTY DISCLOSURE REPORT</td> <td></td> </tr> </table> <p><b>BEFORE</b></p> <p><b>PROPERTY DISCLOSURE REPORT:</b> Buyer is to be provided with a Property Disclosure Report issued on subject property prior to the close of escrow. It is acknowledged that the representations made in the Natural Hazard Disclosure Report are based upon information provided by an independent third party, pursuant to California Civil Code Section 1102.4. It is further acknowledged that Escrow Holder HAS NOT and WILL NOT verify the information contained in said report and all parties to this escrow hereby hold Escrow Holder harmless from any losses which may be sustained as a result of any errors or inaccuracies in the information contained in the Natural Hazard Disclosure Report. Per the instruction of the Listing/Selling Agent, Escrow Holder is authorized and instructed to order said report and to pay for same from the net proceeds due the Seller at the close of escrow.</p> <p><b>AFTER</b></p> <p><b>PROPERTY DISCLOSURE REPORT:</b> Seller shall provide Buyer with a Property Disclosure Report issued on subject property prior to the close of escrow. It is acknowledged that the representations made in the Natural Hazard Disclosure Report are based upon information provided by an independent third party, pursuant to California Civil Code Section 1102.4. It is further acknowledged that Escrow Holder HAS NOT and WILL NOT verify the information contained in said report and all parties to this escrow hereby hold Escrow Holder harmless from any losses which may be sustained as a result of any errors or inaccuracies in the information contained in the Natural Hazard Disclosure Report. <b>Last sentence removed.</b></p>				Code	Name		prop02	PROPERTY DISCLOSURE REPORT	
Code	Name								
prop02	PROPERTY DISCLOSURE REPORT								

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REPORTS

Closing by Post Date			
<b>New/Mod Change</b>	<b>Requested By</b> FNT SD Admin	<b>Incident No.</b>	<b>TFS No.</b> 765940
Updated logic and formatting.			
<b>Affected item(s):</b> Closing by Post Date			

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

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<i>Deeds of Trust (3)</i>			
New/Mod Change	Requested By	Incident No.	TFS No.
	FNT CO	INC230205191	769781
Under Item 2.1, updated to replace the First Payment date with the Settlement date.			
<div style="border: 1px solid black; padding: 5px;"> <p><b>2. Note; Other Obligations Secured.</b> This Deed of Trust is given to secure to Lender:</p> <p>2.1. the repayment of the indebtedness evidenced by Borrower's note (Note) dated <b>June 1, 2023</b>, in the principal sum Four Hundred Fifty Thousand And No/100 Dollars (\$450,000.00), with interest on the unpaid principal balance from <b>June 2, 2023</b>, until paid, at the rate of _____ Percent (____%) per annum, with principal and interest payable at <b>100 Address St., North Wales, CO 99999</b> or such other place as Lender may designate, in <b>monthly</b> payments of _____ Dollars (U.S. \$ _____) due on the <b>1st</b> day of each <b>month</b> beginning <b>June 2, 2023</b>; such payments to continue until the entire indebtedness evidenced by said Note is fully paid;</p> </div>			
<b>Affected item(s):</b> Deed of Trust TD72-8-10 Strict Due on Sale Deed of Trust TD73-8-10 Creditworthy Deed of Trust TD74-8-10 Assumable			

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<i>Letter (Unable to Issue Policy - Title)</i>			
New/Mod Change	Requested By	Incident No.	TFS No.
	Colorado Title Group		769127
Added additional language under the check box items.			
<div style="border: 1px solid black; padding: 10px;"> <p><input type="checkbox"/> Documents requested in Requirement _____ of the above referenced Commitment have not been received.</p> <p><input type="checkbox"/> Survey and/or lien affidavit has not been received.</p> <p><input type="checkbox"/> Other: _____</p> <p>Please be advised that Colorado law requires any lender receiving payment in full for a lien of record, either a Deed of Trust or a Mortgage, to release said encumbrance of record within One Hundred and Twenty (120) days. Failure to do so will result in moving Requirement No. _____ of your commitment to an exception on your final title policy.</p> <p>Sincerely,              Sandy L. Moore            Closing Specialist            SandraL.Moore@thisisnotreal.com</p> </div>			
<b>Affected item(s):</b> Letter (Unable to Issue Policy - Title)			

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

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MY SCREENS

*Additional Title Charges Screen*

<b>New/Mod</b> Mod	<b>Requested By</b> Phil Clark Kristin Hocker	<b>Incident No.</b>	<b>TFS No.</b>
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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, In favor of).

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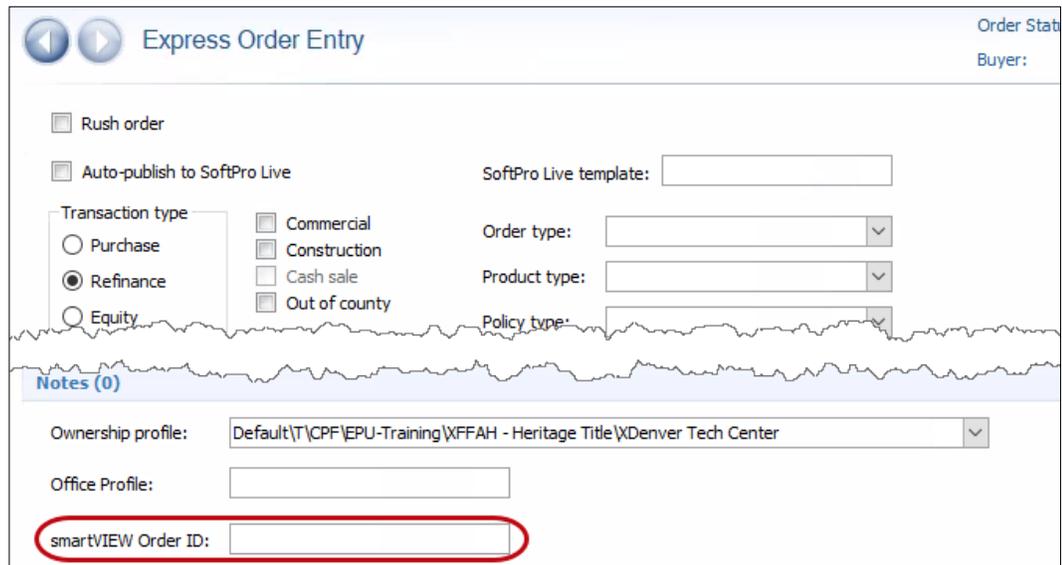
*Express Order Entry Screen*

<b>New/Mod</b> Mod	<b>Requested By</b> Karen Benelli	<b>Incident No.</b>	<b>TFS No.</b>
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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'. Below this, there are several input fields and checkboxes: 'Rush order', 'Auto-publish to SoftPro Live', 'SoftPro Live template', 'Transaction type' (with sub-options: Purchase, Refinance, Equity), 'Commercial', 'Construction', 'Cash sale', 'Out of county', 'Order type', 'Product type', and 'Policy type'. A 'Notes (0)' section is visible. Below the notes, there are fields for 'Ownership profile' (with a dropdown menu), 'Office Profile', and 'smartVIEW Order ID'. The 'smartVIEW Order ID' field is highlighted with a red circle.

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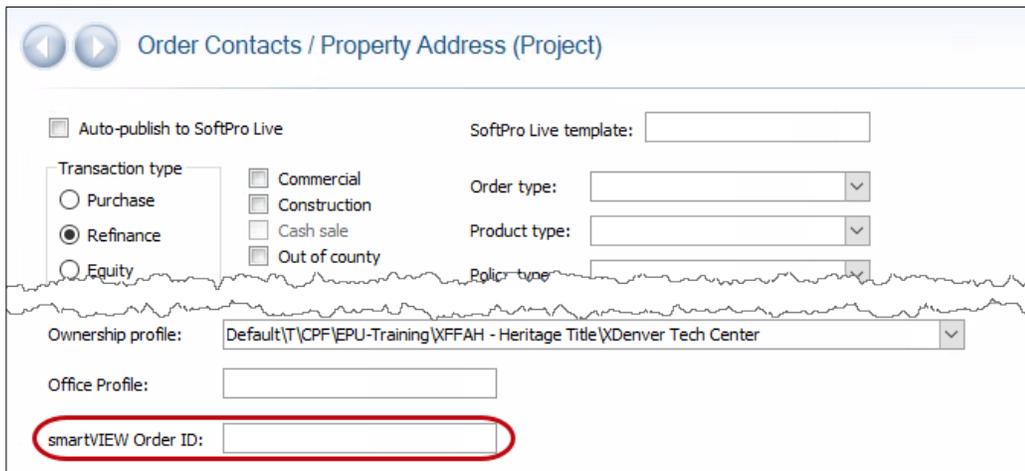
*Order Contacts / Property Address (Project) Screen*

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

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:

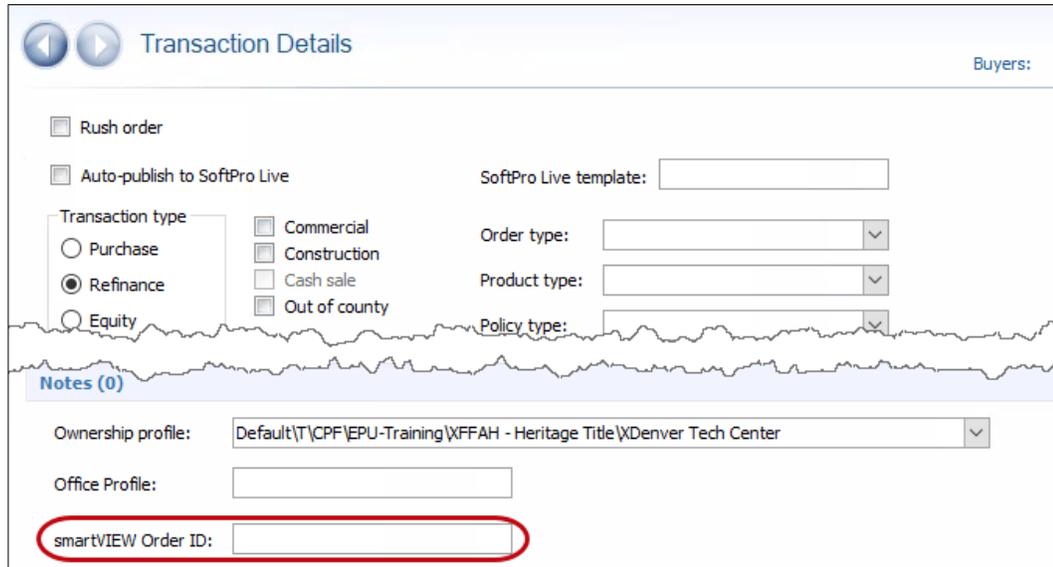
- Auto-publish to SoftPro Live
- SoftPro Live template:
- Transaction type:
  - Purchase
  - Refinance
  - Equity
- Commercial
- Construction
- Cash sale
- Out of county
- Order type:
- Product type:
- Policy type:
- Ownership profile:
- Office Profile:
- smartVIEW Order ID:**  (This field is circled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

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*Transaction Details Screen*

<b>New/Mod</b> Mod	<b>Requested By</b> Karen Benelli	<b>Incident No.</b>	<b>TFS No.</b>
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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:**

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CONNECTICUT

MY SCREENS

*Express Order Entry Screen*

<b>New/Mod</b> Mod	<b>Requested By</b> Karen Benelli	<b>Incident No.</b>	<b>TFS No.</b>
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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 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 circle.

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DELAWARE

MY SCREENS

<i>Order Entry Screen</i>			
<b>New/Mod</b> Mod	<b>Requested By</b> Karen Benelli	<b>Incident No.</b>	<b>TFS No.</b>
<p>The smartview Order field has been moved to the bottom of the Order Entry screen. This change is visible when the My Screens &gt; 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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DISTRICT OF COLUMBIA

DOCUMENTS

Title

<i>ALTA Loan and Owner's Policies - Co-Insurance</i>			
<b>New/Mod Change</b>	<b>Requested By</b> FT DC.Richmond	<b>Incident No.</b>	<b>TFS No.</b> 769673
<p>Per approval of state counsel, the Co-Insurance (ALTA 23-06) language has been updated and is now available to all DC operations.</p> <p>The language is now enclosed in parentheses and "total liability" has been replaced with "Aggregate Amount of Insurance".</p> <p>In addition, the prompted field to enter the Co-insuring Underwriter can either be filled in, as usual, or can be left empty, which will default the text "each Co-Insurer" to print on the document.</p> <p>Resulting language shown on the Policy is:  \$ _____ (which represents _____ % of the Aggregate Amount of Insurance of  \$ _____ reflected on the attached ALTA 23-06 Endorsement with  _____ )</p> <p>Resulting language shown for a policy on a Commitment is:  \$ _____ (which represents _____ % of the Aggregate Amount of Insurance of  \$ _____ to be reflected on the ALTA 23-06 Endorsement to be issued by  _____ and attached to the final policy)</p> <p><b>Affected item(s):</b>  ALTA Commitment 2016 (DC VA MD)  ALTA Commitment 2021 (DC VA MD)  ALTA Loan Policy 2006 (DC VA MD)  ALTA Loan Policy 2021 (DC VA MD)  ALTA Owner's Policy 2006 (DC VA MD)  ALTA Owner's Policy 2021 (DC VA MD)</p>			

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FLORIDA

REPORTS

Project Deposit Report			
<b>New/Mod</b> New	<b>Requested By</b> FNT Escrow Admin	<b>Incident No.</b>	<b>TFS No.</b> 767045
New Report for FNT.			
<b>Affected item(s):</b> SSCORP5584.rpt - Project Deposit Report (New)			

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GEORGIA

MY SCREENS

*Express Order Entry Screen*

<b>New/Mod</b> Mod	<b>Requested By</b> Karen Benelli	<b>Incident No.</b>	<b>TFS No.</b>
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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 > 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. Three dropdown menus are present for Order type, Product type, and Policy type. Below these is a 'Notes (0)' section, 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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HAWAII

CHECKS

TG HW Check Template			
<b>New/Mod</b> Change	<b>Requested By</b> IT Admin	<b>Incident No.</b>	<b>TFS No.</b> 766401
Updated to omit vesting data on the stub.			
<b>Affected item(s):</b> FNFCORP_TG_HI.rpt			

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DOCUMENTS

Escrow

*El - Cancel Instructions - Mutual*

<b>New/Mod Change</b>	<b>Requested By</b> FT HI	<b>Incident No.</b>	<b>TFS No.</b> 769148
-----------------------	------------------------------	---------------------	--------------------------

For **FT Hawaii ONLY** - updated the signature section for user to optionally reflect the Buyer's and/or Seller's Broker(s).

**SELLER(S):**

Samuel S. Seller \_\_\_\_\_ Date \_\_\_\_\_

Samantha S. Seller \_\_\_\_\_ Date \_\_\_\_\_

**BUYER'S BROKER READ, ACKNOWLEDGED AND APPROVED:**

By: \_\_\_\_\_ Signature \_\_\_\_\_ Date \_\_\_\_\_

**SELLER'S BROKER READ, ACKNOWLEDGED AND APPROVED:**

By: \_\_\_\_\_ Signature \_\_\_\_\_ Date \_\_\_\_\_

Select option for signature section (leave empty for none)

Both

Buyer's Broker

Seller's Broker

Skip remaining prompts

**Affected item(s):**  
El - Cancel Instructions - Mutual

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*Indemnity Agreement (Mechanics' Liens)*

<b>New/Mod Change</b>	<b>Requested By</b> FT HI	<b>Incident No.</b>	<b>TFS No.</b> 766469
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Updated to reflect most recent version.

**Affected item(s):**  
Indemnity Agreement (Mechanics' Liens)

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*Letter (Form D.1 - Parties in Possession)*

<b>New/Mod Change</b>	<b>Requested By</b> Title Guaranty	<b>Incident No.</b>	<b>TFS No.</b> 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)

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*Letter (HOA Closing - HI)*

<b>New/Mod Change</b>	<b>Requested By</b> FT HI	<b>Incident No.</b>	<b>TFS No.</b> 768020
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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 Title Guaranty	Incident No.	TFS No. 768378
Added custom field prompt for signature section and adjusted to allow users to choose which properties to reflect.			
<b>Affected item(s):</b> 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 Title Guaranty	Incident No.	TFS No. 768372
Replaced hard coded text in 2nd paragraph with prompt asking for endorsement.			
<b>Affected item(s):</b> Letter (Title Endorsement Transmittal)			

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IDAHO

DOCUMENTS

Escrow

<i>Deed (Personal Representative's)</i>			
<b>New/Mod</b> New	<b>Requested By</b> FT ID	<b>Incident No.</b>	<b>TFS No.</b> 769470
New letter sized version. Please render to view in full.			
<b>Affected item(s):</b> IDD1157.doc - Deed (Personal Representative's) (New)			

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<i>EI - Purchase and Sale (EIS)</i>			
<b>New/Mod</b> Change	<b>Requested By</b> FT ID	<b>Incident No.</b>	<b>TFS No.</b> 770049
Added prompt for making forwarding address optional for the Seller's signature.			
<b>Affected item(s):</b> EI - Purchase and Sale (EIS)			

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ILLINOIS

DOCUMENTS

Escrow

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

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<a href="#"><i>Construction Loan Escrow and Disbursement Agreement</i></a>			
<b>New/Mod</b> New	<b>Requested By</b> MidWest IT	<b>Incident No.</b>	<b>TFS No.</b> 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><b>A. Owner/Borrower:</b></p> <p>Stephen T. Seller and Stephanie T. Seller 100 Property Street, Unit 100A Chicago, IL 60290</p> <p>Email: <a href="mailto:seller1@email.com">seller1@email.com</a></p>	<p><b>Attorney for Owner/Borrower:</b></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: <a href="mailto:sellerlaw@email.com">sellerlaw@email.com</a></p>
<p><b>B. Lender:</b></p> <p>Lender Bank &amp; Trust 1000 Big Money Avenue, Suite 1000 Beverly Hills, CA 90210</p>	<p><b>Contact Person:</b> Larry Lender Phone No.: (800)333-1000 Fax No.: (800)333-1111 Email: <a href="mailto:LenderBandT@email.com">LenderBandT@email.com</a></p>
<p><b>C. Escrowee:</b></p> <p>Fidelity National Title Group 1000 Settlement Way, Suite 100 Settlement City, IL 99999</p>	<p><b>Contact Person:</b> Joseph D Kirby Phone No.: (888)111-5555 Fax No.: (888)111-4321 Email: <a href="mailto:JKirby@notreal.com">JKirby@notreal.com</a></p>
<p><b>D. Title Insurer:</b></p> <p>Fidelity National Title Insurance Company 1001 Title Way, Suite 100 Title City, IL 99999</p>	<p><b>Contact Person:</b> Tammy Title Phone No.: (800)777-2468 Fax No.: (800)777-8642 Email: <a href="mailto:fntic@email.com">fntic@email.com</a></p>
<p><b>E. Inspector/Architect</b></p> <p>Name: _____</p> <p>Address: _____</p> <p>_____</p> <p>_____</p>	<p><b>Contact Person:</b> _____</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>			
<b>New/Mod</b> Change	<b>Requested By</b> CT Metro	<b>Incident No.</b>	<b>TFS No.</b> 767236
Added 'Print Name' and 'Signature' to SENDER CHECKLIST and APPROVED CHECKLIST.			
<p><b>SENDER CHECKLIST</b>    Print Name: _____ Signature: _____</p> <p>Has there been a change to wire instructions?    <input type="checkbox"/> Yes    <input type="checkbox"/> No</p>			
<p><b>APPROVED CHECKLIST</b>    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><b>Affected item(s):</b> Payoff Wire Checklist Proceeds Wire Checklist</p>			

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INDIANA

DOCUMENTS

Title

<a href="#"><i>ALTA Owner's Policy 2021</i></a>			
<b>New/Mod Change</b>	<b>Requested By</b> FT IN	<b>Incident No.</b>	<b>TFS No.</b> 770053
<p>For FT Indiana only: Per approval of state counsel, the 2021 ALTA Owner's Policy has been updated to enable item 5 (endorsements incorporated by reference) to show on Schedule A.</p> <p>As with item 6 of the loan policy, this will default to always appear on the policy and if no applicable endorsements are selected to show (or if none have been added to the policy) it will show "NONE" under item 5.</p> <p>If item 5 should not show on the policy, it can be omitted by checking the "Check to remove item 5 list of endorsements from Schedule A of ALTA Owners policy" box under the Custom Fields bar (near the bottom of the custom fields) on the Policy Schedule A screen for the Owner's Policy.</p> <p><b><u>Affected item(s):</u></b> ALTA Owner's Policy 2021 (IN)</p>			

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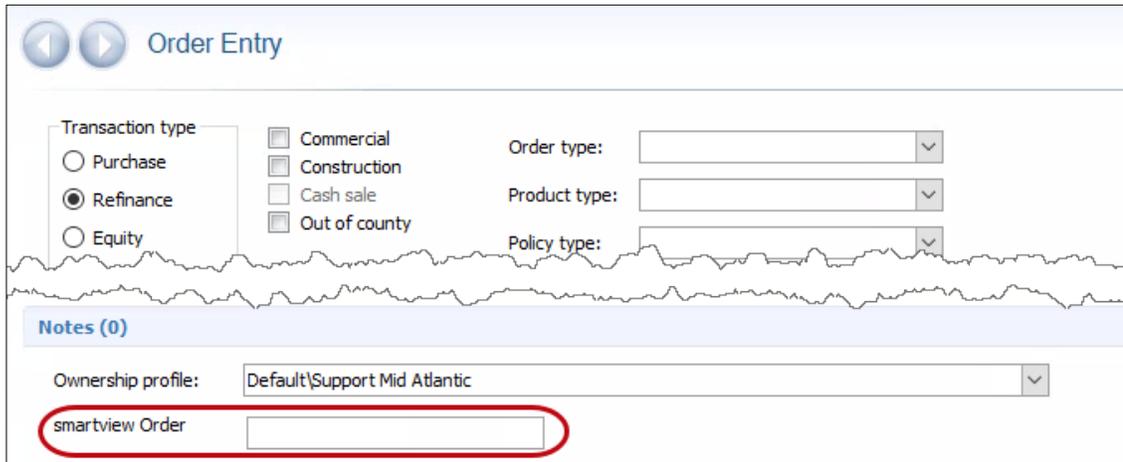
MAINE

MY SCREENS

*Order Entry Screen*

<b>New/Mod</b> Mod	<b>Requested By</b> Karen Benelli	<b>Incident No.</b>	<b>TFS No.</b>
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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, circled in red]

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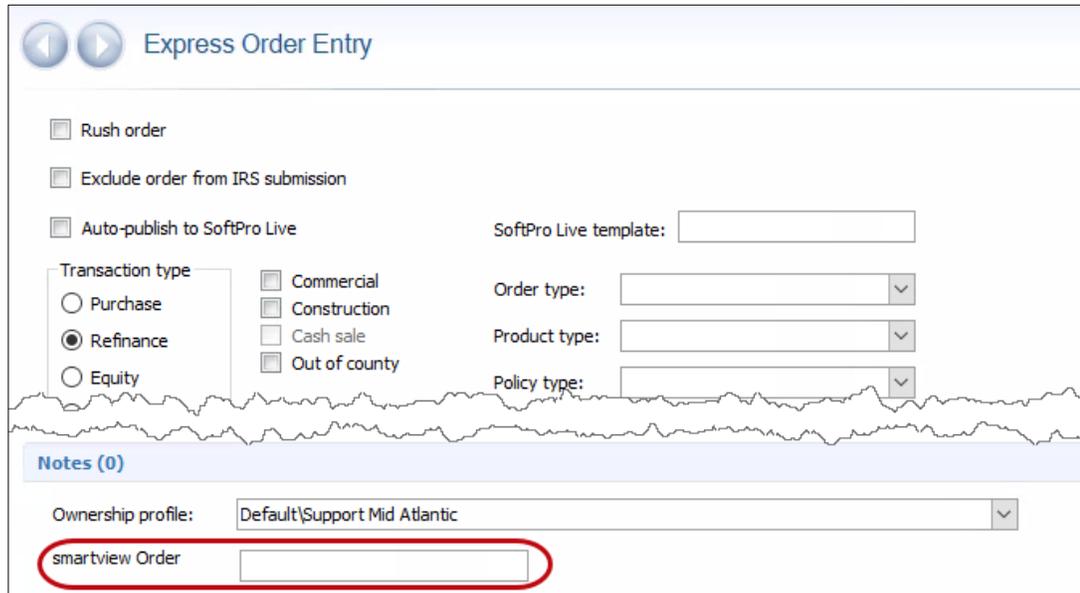
MARYLAND

MY SCREENS

*Express Order Entry Screen*

<b>New/Mod</b> Mod	<b>Requested By</b> Karen Benelli	<b>Incident No.</b>	<b>TFS No.</b>
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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 > FNT-Maryland CSS screen is selected.



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

- Rush order
- Exclude order from IRS submission
- 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:
- smartview Order:  (circled in red)

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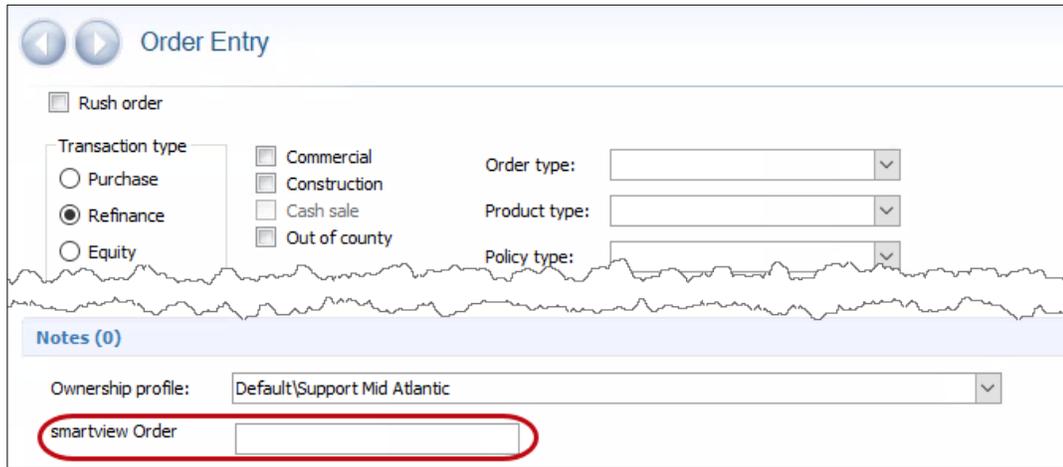
MASSACHUSETTS

MY SCREENS

*Order Entry Screen*

<b>New/Mod</b> Mod	<b>Requested By</b> Karen Benelli	<b>Incident No.</b>	<b>TFS No.</b>
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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 elements:

- Order Entry** header with navigation arrows.
- Rush order
- Transaction type** section:
  - Purchase
  - Refinance
  - Equity
- Additional checkboxes:
  - Commercial
  - Construction
  - Cash sale
  - Out of county
- Order type:  (dropdown)
- Product type:  (dropdown)
- Policy type:  (dropdown)
- Notes (0)** section
- Ownership profile:  (dropdown) with value 'Default\Support Mid Atlantic'
- smartview Order** field:  (circled in red)

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MINNESOTA

DOCUMENTS

Escrow

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

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Title

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

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NEVADA

DOCUMENTS

Escrow

<i>Closing Letter (8)</i>			
<b>New/Mod</b> Change	<b>Requested By</b> Softpro User Group #21	<b>Incident No.</b>	<b>TFS No.</b> 769518

Added an option to choose Via Courier, Via Email, Via Overnight, or Via Standard Mail above the addressee.

100 Escrow Office Street  
EO City, CA 54545  
Phone: (800)777-4444 / Fax: (800)444-7777

**Date:** June 1, 2023  
**Escrow No.:** JM CD Test 2023-MGS  
**Borrower(s):** Bryan B. Buyer and Brenda B. Buyer  
**Seller(s):** Samuel S. Seller and Samantha S. Seller  
**Property:** 100 Property Avenue  
Property City, CA 55555

**Via Standard Mail**  
Samuel S. Seller and Samantha S. Seller  
123 Seller Fwd Street  
Slr Fwd City, CA 55555

**Affected item(s):**

- Closing Letter
- Closing Letter (Buyer-Borrower)
- Closing Letter (Lender)
- Closing Letter (Listing Agent-Broker)
- Closing Letter (Mortgage Broker)
- Closing Letter (Seller)
- Closing Letter (Selling Agent-Broker)

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<i>Property Tax Withhold Instructions</i>			
<b>New/Mod</b> Change	<b>Requested By</b> NV	<b>Incident No.</b>	<b>TFS No.</b> 769158

Revised functionality to ask users who should be signing the form.

**Affected item(s):**

- Property Tax Withhold Instructions

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NEW YORK

DOCUMENTS

Escrow

<i>COOP INSURANCE-SEARCH</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change	Riverhead, NY		770051
Added "on unit only" to Mechanic's Liens.			
<div style="border: 1px solid black; padding: 10px;"> <p>Mechanic's Liens (only in County1 County, on unit only): NONE FOUND</p> </div>			
<b>Affected item(s):</b> COOP INSURANCE-SEARCH			

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

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

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<i>Order Confirmation (NCS)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change	NCS User Group Request #NCS0037		766964
Form was revised to remove itemized charges.			
<div style="border: 1px solid black; padding: 20px;"> <p style="text-align: right;"><b>ORDER CONFIRMATION</b></p>   <p>Title No.: 123456789  Date of Application: March 10, 2023  Sales Representative: Renee Thornton  2204  Renee.Thornton@softprocorp.com</p> <hr/> <p style="text-align: center;"><b>TRANSACTION INFORMATION</b></p> <p>Notes: PreviousOrderNum123                      Owner Liability: \$499,900.00</p> </div>			
<b>Affected item(s):</b> Order Confirmation (NCS)			

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NORTH CAROLINA

MY SCREENS

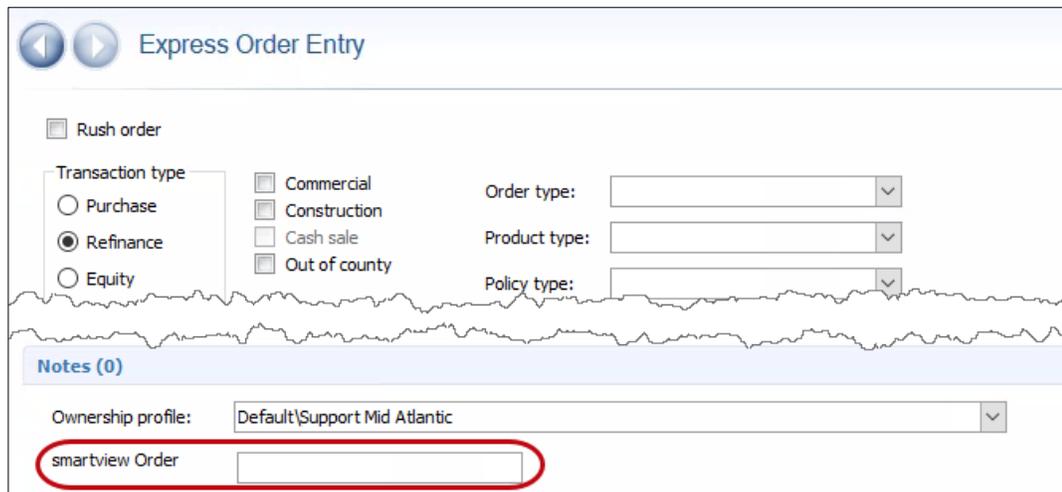
*Express Order Entry Screen*

<b>New/Mod</b> Mod	<b>Requested By</b> Karen Benelli	<b>Incident No.</b>	<b>TFS No.</b>
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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

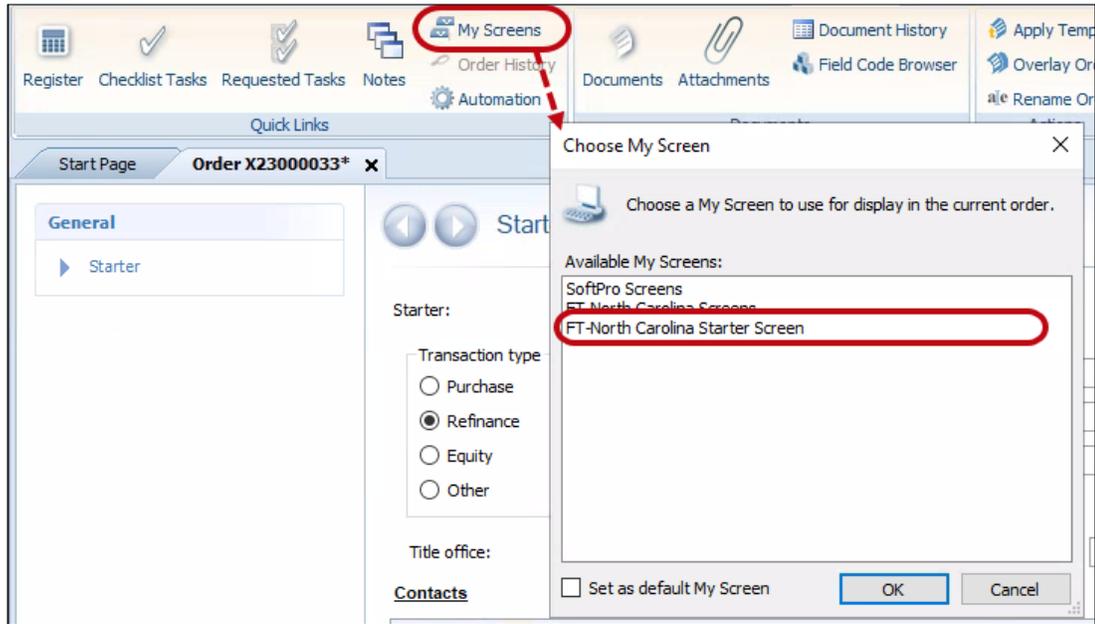


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*My Screens*

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



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*Starter Screen*

<b>New/Mod</b> Mod	<b>Requested By</b> Chris Barbour	<b>Incident No.</b>	<b>TFS No.</b>
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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 list of checkboxes for Commercial, Construction, Cash sale, and Out of county. To the right, there 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			
<b>New/Mod Change</b>	<b>Requested By Config</b>	<b>Incident No.</b>	<b>TFS No.</b> 767581
Added Sales Rep pick list and removed the Starters Requested column.			
<b>Affected item(s):</b> 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.			
<b>Affected item(s):</b> Affiliated Business Arrangement Disclosure Statement			

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<i>Affiliated Business Arrangement Disclosure Statements (3)</i>			
New/Mod New	Requested By CTNOH	Incident No.	TFS No. 769464
Updated the existing version to be entitled "ACT ABA Cleveland" and bring in the "FROM" contact from the file. A Toledo version and GMT version have also been added. Please render to view in full.			
<b>Affected item(s):</b> OHD1460.doc - ACT ABA Cleveland (New) OHD1461.doc - ACT ABA Toledo (New) OHD1462.doc - ACT ABA GMT (New)			

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<i>Escrow Trust Instructions Sole Order (Earnest Money)</i>			
New/Mod Change	Requested By CT OH	Incident No. INC220516346	TFS No. 769161
Revised "Trustee" to "Holder" in the below paragraph. Also, the "Investment" and "Notice of Opportunity to Earn Interest" paragraphs have been removed.			
<p>The parties to this escrow acknowledge that, the maintenance of escrow accounts with some depository institutions may result in Escrow Trustee or its affiliates being provided with bank services, accommodations, or other benefits by the depository institution. Escrow <b>Holder</b> or its affiliates also may elect to enter into other business transactions with or obtain loans for investment or other purposes from the depository institution. All such services, accommodations and other benefits shall accrue to Escrow <b>Holder</b> or its affiliates, and Escrow <b>Holder</b> or its affiliates shall have no obligation to account to the parties to the escrow for the value of such services, accommodations, or other benefits.</p>			
<b>Affected item(s):</b> Escrow Trust Instructions Sole Order (Earnest Money)			

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OKLAHOMA

DOCUMENTS

Escrow

<a href="#"><i>Signature Replacement (8)</i></a>			
<b>New/Mod</b> Change	<b>Requested By</b> CT OK	<b>Incident No.</b>	<b>TFS No.</b> 767226
Updated to reflect Alicia Cosby's signature.			
<b><u>Affected item(s):</u></b> 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			

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OREGON

DOCUMENTS

Escrow

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

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<i>Affidavit (Indemnity Agreement by Owner) (2)</i>			
<b>New/Mod</b> Change	<b>Requested By</b> State Counsel	<b>Incident No.</b>	<b>TFS No.</b> 768456
Letter sized version has been created. Revised part of the first paragraph to read "...described in that certain Preliminary Report or Commitment for Title Insurance...". Also now provides blank lines when the number of years is left blank, as well as items 1, 3, 4, 5 and 6. Lastly, a WARNING will render if the jurat field is empty.			
<b>Affected item(s):</b> Affidavit (Indemnity Agreement by Owner - Legal) ORD1526.doc - Affidavit (Indemnity Agreement by Owner) (New)			

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<i>Exceptions on Deeds (formatting fix)</i>			
<b>New/Mod</b> Change	<b>Requested By</b> OR	<b>Incident No.</b>	<b>TFS No.</b> 767241
Updated formatting so that when exceptions go to an Exhibit that there is proper spacing after each one.			
<b>Affected item(s):</b> 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

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

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' 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 circle.

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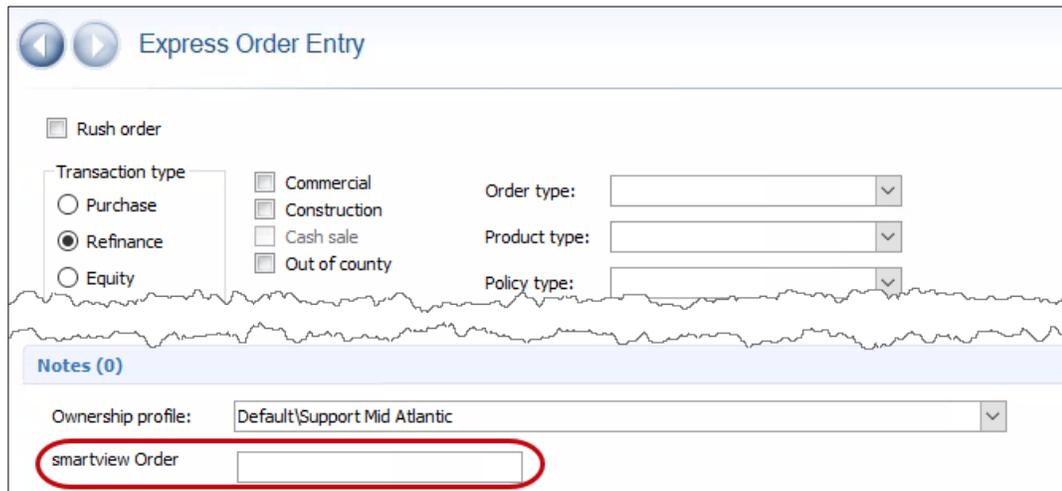
RHODE ISLAND

MY SCREENS

*Express Order Entry Screen*

<b>New/Mod</b> Mod	<b>Requested By</b> Karen Benelli	<b>Incident No.</b>	<b>TFS No.</b>
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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 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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SOUTH CAROLINA

MY SCREENS

*Express Order Entry Screen*

<b>New/Mod</b> Mod	<b>Requested By</b> Karen Benelli	<b>Incident No.</b>	<b>TFS No.</b>
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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. 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 circled in red, indicating its new position.

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TEXAS

DOCUMENTS

Escrow

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

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<i>Form T-00 (Verification of Services Rendered) Title Only - No Issue (Legal)</i>			
<b>New/Mod</b> Change	<b>Requested By</b> South TX and San Antonio TX	<b>Incident No.</b>	<b>TFS No.</b> 769144
Updated address for Section 1, Part 3:			
<div style="border: 1px solid black; padding: 5px;"> <p>3. INFORMATION ABOUT AGENT/ENTITY DOING THE WORK:</p> <p>Type of entity: <input checked="" type="checkbox"/> Texas Underwriter    <input type="checkbox"/> Texas Title Agent  <input type="checkbox"/> Texas Attorney at Law or Texas PC organized to provide legal services</p> <p>Name: <u>Chicago Title Insurance Company</u></p> <p>Address: <u>4600 Fuller Drive, Suite 400</u></p> <p>City, State/ZIP: <u>Irving, Texas 75038</u></p> <p>Firm ID Number or Texas State Bar Number: <u>91965</u></p> </div>			
<b>Affected item(s):</b> Form T-00 (Verification of Services Rendered) Title Only - No Issue (Legal)			

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VIRGINIA/ WEST VIRGINIA

MY SCREENS

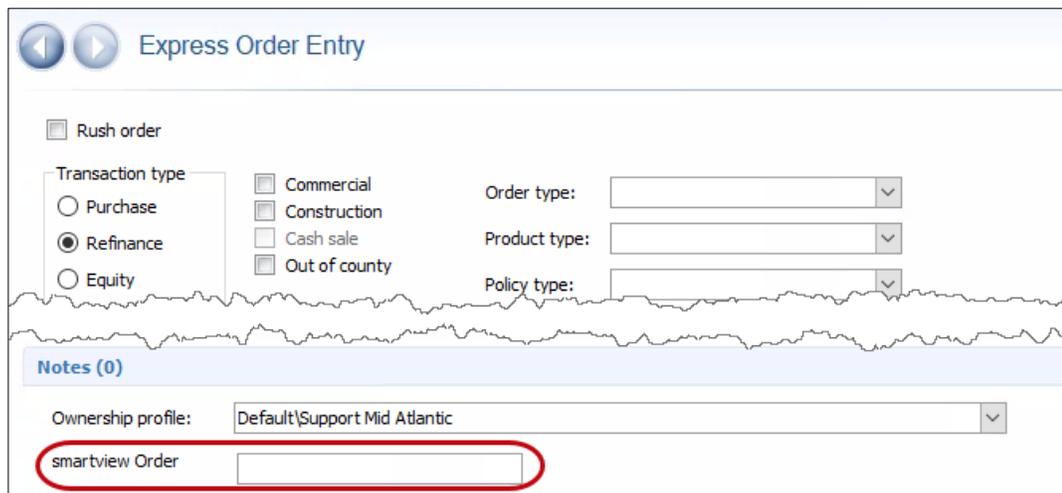
*Express Order Entry Screen*

<b>New/Mod</b> Mod	<b>Requested By</b> Karen Benelli	<b>Incident No.</b>	<b>TFS No.</b>
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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 oval.

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WASHINGTON

DOCUMENTS

Escrow

<i>Affidavit (Lost Note and or DOT)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change	WA		769153
Corrected typo in the 2nd paragraph from "which not" to "which will not".			
<b>Affected item(s):</b> Affidavit (Lost Note and or DOT)			

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<i>Assumption Demand (Private Party)</i>			
New/Mod	Requested By	Incident No.	TFS No.
New	WA		766480
New document. Please render to view in full.			
<b>Affected item(s):</b> Assumption Demand (Private Party)			

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<i>Form WC (Affirmation for Withholding on OR Real Property) (2023)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change	Ticor Title		770047
Edit options have been updated to unrestricted and a new custom field prompt has been added for the "Transferor is (check one)".			
<b>Affected item(s):</b> Form WC (Affirmation for Withholding on OR Real Property) (2023)			

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<i>Master Real Estate Excise Tax Affidavits (2023) (4)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change	WA		767843
Updated to reflect changes effective July 1st. Please render to view in full.			
<b>Affected item(s):</b> 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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<i>RE Agent Compensation Request</i>			
New/Mod Change	Requested By	Incident No.	TFS No.
	CT Everett		770042
Updated to add new prompt and Mail Check(s) to sections. Removed Compensation and Affiliate Fee section.			
<p>Please provide the requested information, sign the form or attach your Compensation Disbursement form, and return it as soon as possible by fax or email to the number/email provided below. Thank you for your prompt attention to this request.</p> <p><b>Amount of Earnest money you hold \$</b> _____</p> <p>Compensation Total = \$ _____ or _____ % of Sales Price, which is <b>\$505,000.00</b></p> <p>Split as follows:</p> <p>_____ % OR \$ _____ To: _____</p> <p><b>Mail Check(s) to:</b> _____</p> <p>Wire Transfer: <input checked="" type="checkbox"/> Include wire transfer section?</p> <p>Account Name: _____</p> <p>Receiving Bank: _____</p> <p>ABA No.: _____</p> <p>Account No.: _____</p>			
<p><b>Affected item(s):</b>            RE Agent Compensation Request            RE Agent Compensation Request (Listing)            RE Agent Compensation Request (Selling)</p>			

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<i>Release of Lien (LPB 60)</i>			
New/Mod Change	Requested By	Incident No.	TFS No.
	FT Tacoma		770038
Updated to reflect date and recording information from the existing liens screen.			
<p><b>Affected item(s):</b>            Release of Lien (LPB 60)</p>			

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PHRASE(S)

<i>Revised EI Phrase</i>							
<b>New/Mod Change</b>	<b>Requested By</b> CT-Everett	<b>Incident No.</b>	<b>TFS No.</b> 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><b>BEFORE</b></p> <p><b>HOLDBACK FOR TAX PAYMENT:</b> 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><b>AFTER</b></p> <p><b>HOLDBACK FOR TAX PAYMENT:</b> 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>			
<b>New/Mod</b> New	<b>Requested By</b> State Counsel	<b>Incident No.</b> INC230187106	<b>TFS No.</b> 768388
New document. Please render to view in full.			
<div style="border: 1px solid black; padding: 10px;"> <div style="display: flex; justify-content: space-between; align-items: center;">  <span style="font-size: 24px; font-weight: bold;">Company Name</span> </div> <div style="text-align: right; margin-top: 10px;"> <p><b>ESCROW INSTRUCTIONS</b> <b>(STRICT JOINT ORDER #5)</b></p> </div> <div style="margin-top: 20px;"> <p>Melissa G Smith, Closing Specialist Escrow Office Name, Escrow Agent 100 Escrow Office Street EO City, WI 54545 Phone: (800)777-4444 Fax: (800)444-7777</p> <p><b>Date:</b> May 31, 2023 <b>Escrow No.:</b> JM CD Test 2023-MGS</p> </div> <div style="margin-top: 10px;"> <p><b>CUSTOMER IDENTIFICATION:</b></p> <p>Property Address: 100 Property Avenue, Property City, WI 55555 Project Reference: Project Name Proposed Disbursement Date: June 2, 2023</p> </div> <div style="margin-top: 10px;"> <p><b>DEPOSITS:</b></p> <p><a href="#">Prompt for deposit information</a></p> </div> <div style="margin-top: 10px;"> <p><b>DELIVERY OF DEPOSITS:</b></p> <p>The above-referenced escrow deposits ("deposits") are deposited with the Escrow Agent to be delivered by it only upon the receipt of a joint order of the undersigned or their respective legal representatives or assigns.</p> <p>In no case shall the above-mentioned deposits be surrendered except upon the receipt of an order signed by the parties hereto, their respective legal representatives or assigns, or in obedience to the court order described below.</p> </div> </div>			
<b>Affected item(s):</b> WID0263.doc - Escrow Instructions (Strict Joint Order #5) (New)			

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

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ALMA AGENCY

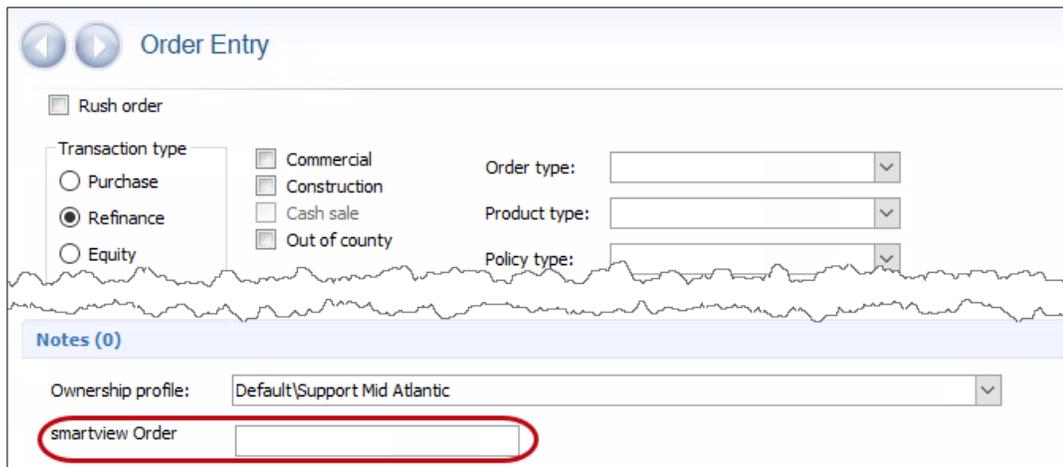
MY SCREENS

*Order Entry Screen*

<b>New/Mod</b> Mod	<b>Requested By</b> Karen Benelli	<b>Incident No.</b>	<b>TFS No.</b>
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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 > ALMA screen is selected.



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

- Order Entry** header with navigation arrows.
- Rush order
- Transaction type** section:
  - Purchase
  - Refinance
  - Equity
- Property type checkboxes:
  - Commercial
  - Construction
  - Cash sale
  - Out of county
- Order type:  (dropdown)
- Product type:  (dropdown)
- Policy type:  (dropdown)
- Notes (0)** section
- Ownership profile:  Default\Support Mid Atlantic (dropdown)
- smartview Order** field:  (circled in red)

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LIBERTY TITLE

REPORTS

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

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NCS

MY SCREENS

*Endorsements Screen*

<b>New/Mod</b> Mod	<b>Requested By</b> Atlanta	<b>Incident No.</b>	<b>TFS No.</b>
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The **Enter the [Issuing, first, second, third, etc.] Co-insurer's name and address** entries have been changed to a link to access the new **Co-Insurer Lookup Table** for each of the Co-Insurance custom fields for the following endorsements:

- > ALTA 23-06 (all states)
- > ALTA 23.1-06 (all states)
- > TIRBOP 1610
- > TIRBOP 1611
- > LATISSO 104
- > CLTA 114.3-06
- > CLTA 114.4-06
- > TIRSA Co-Insurance Endorsement
- > CO 114.3-06
- > T-48

The Co-Insurer name and address table varies depending upon the endorsement chosen.

These changes are visible when one of the following **My Screens** is selected:

- > AmeriTitle
- > BOS – NCS
- > CA NCS Screens
- > First Title of Georgia-All Screens
- > FNF NYC All Screens Insured
- > GA Commercial CSS
- > GA Clean Title
- > GL Commercial CSS
- > IL – NCS
- > IL – UCC
- > MN Commercial CSS
- > MN Escrow
- > MN Title
- > NCS Screens
- > OH Commercial
- > OH Commercial CSS
- > Residential
- > TX NCS Screens
- > Washington Commercial CSS Screens
- > Washington Escrow Screens
- > Washington Title Screens

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NE AGENCY

MY SCREENS

*Express Order Entry Screen*

<b>New/Mod</b> Mod	<b>Requested By</b> Karen Benelli	<b>Incident No.</b>	<b>TFS No.</b>
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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 '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. Below these are dropdown menus for Order type, Product type, and Policy type. A 'Notes (0)' section is present. 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*

<b>New/Mod</b> Mod	<b>Requested By</b> Karen Benelli	<b>Incident No.</b>	<b>TFS No.</b>
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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 also 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

*Cover Letter (Reasonable and Customary Fees)*

<b>New/Mod</b> New	<b>Requested By</b> Novare	<b>Incident No.</b>	<b>TFS No.</b> 768032
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New document. Please render to view in full.



**Fidelity National Title**

236 Quarry Road  
City1, CA 99999  
Phone: (800)777-4444 / Fax: (800)444-7777

**Dated:** May 23, 2023

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.

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.

Sincerely,

*Joseph D Kirby*  
**Joseph D Kirby**  
 Title Examiner  
[JKirby@notreal.com](mailto:JKirby@notreal.com)

**Affected item(s):**

NOVD1229.doc - Cover Letter (Reasonable and Customary Fees) (New)

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REPORTS

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

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

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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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