

SOFTPRO SELECT

August 2024

RELEASE NOTES



Testing Release Date: August 2, 2024
Production Release Date: August 12, 2024



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Escrow

<i>Assignor Tax Information for 1099-MISC</i>			
New/Mod Change Request	Requested By Settlement	Incident No.	TFS No. 827278
Removed company and department numbers.			
Affected item(s): SSCORPD0264.doc - Assignor Tax Information for 1099-MISC			

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Commission Clarification Documents (3)

New/Mod New Request	Requested By Settlement	Incident No.	TFS No. 827800
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Due to a settlement agreement the National Association of REALTORS® entered with the Department of Justice, documents have been revised and added to provide a clear understanding of who is authorized to provide instructions as to the payment of real estate commission and to ensure they have the proper authorization to pay real estate commissions. Please refer to tech memo 128-2010 for details on the lawsuit and full explanations of each document.

COMMISSION CLARIFICATION - LISTING BROKERAGE:

- Paying commission from Seller(s) final proceeds.
- Showing Listing Brokerage commissions and acknowledgements.
- Seller signs.

Upon the close of the above referenced escrow, Escrow Holder will pay from the proceeds due Seller(s) the following disbursement:

The Listing Agency \$ 13,000.00
 1000 Listing Way
 Anywhere, CA 99999
 Attn: Lisa T. Lister

TOTAL COMMISSION BEING PAID: \$ 13,000.00

THIS ASSIGNMENT PROVIDES FOR THE DISBURSEMENT OF SAID COMMISSION TO THE BROKER(S) BY ESCROW HOLDER UPON CLOSE OF ESCROW. THESE ESCROW COMMISSION INSTRUCTIONS MAY NOT BE AMENDED OR REVOKED WITHOUT THE WRITTEN CONSENT OF THE BROKER(S) HEREIN.

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

 James Jones _____
Date

 Jessica Jones _____
Date

LISTING BROKER ACKNOWLEDGMENT:
 THE UNDERSIGNED HEREBY ACKNOWLEDGE RECEIPT OF A COPY HEREOF.

The Listing Agency

 Broker's Signature _____
Date

License No. _____

Affected item(s):
 SSCORPD5536.doc - Commission Clarification - Listing Brokerage

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Commission Clarification Documents (continued)

COMMISSION CLARIFICATION - SELLING/BUYER BROKERAGE (Seller version):

- Paying commission from Seller(s) final proceeds.
- Showing Selling Brokerage commissions and acknowledgements.
- Seller signs.

Upon the close of the above referenced escrow, Escrow Holder will pay from the proceeds due Seller(s) the following disbursement:

The Selling Agency 1000 Selling Way Anywhere, CA 99999 Attn: Sammy T. Selling	\$ 9,700.00
--	-------------

TOTAL COMMISSION BEING PAID:	\$ 9,700.00
-------------------------------------	--------------------

THIS ASSIGNMENT PROVIDES FOR THE DISBURSEMENT OF SAID COMMISSION TO THE BROKER(S) BY ESCROW HOLDER UPON CLOSE OF ESCROW.

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

_____	_____
James Jones	Date

_____	_____
Jessica Jones	Date

SELLING BROKER ACKNOWLEDGMENT:
THE UNDERSIGNED HEREBY ACKNOWLEDGE RECEIPT OF A COPY HEREOF.

The Selling Agency

_____	_____
Broker's Signature	Date

License No. _____

Affected item(s):

SSCORPD5536.doc - Commission Clarification - Selling-Buyer Brokerage

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Commission Clarification Documents (continued)

COMMISSION CLARIFICATION - SELLING/BUYER BROKERAGE (Buyer version):

- Paying commission from Buyer(s) final proceeds.
- Showing Selling Brokerage commissions and acknowledgements.
- Buyer signs.

Upon the close of the above referenced escrow, Escrow Holder will pay from the Buyer(s) the following disbursement:

The Selling Agency \$ 9,700.00
1000 Selling Way
Anywhere, CA 99999
Attn: Sammy T. Selling

TOTAL COMMISSION BEING PAID: **\$ 9,700.00**

THIS ASSIGNMENT PROVIDES FOR THE DISBURSEMENT OF SAID COMMISSION TO THE BROKER(S) BY ESCROW HOLDER UPON CLOSE OF ESCROW.

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

Ben Buyer _____
Date

Betty Buyer _____
Date

SELLING BROKER ACKNOWLEDGMENT:
THE UNDERSIGNED HEREBY ACKNOWLEDGE RECEIPT OF A COPY HEREOF.

The Selling Agency

Broker's Signature _____
Date
License No. _____

Affected item(s):
SSCORPD5536.doc - Commission Clarification - Selling-Buyer Brokerage

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Commission Clarification Documents (continued)

COMMISSION CLARIFICATION:

- Escrow Holder pays commission due to Listing Broker.
- Selling Brokerage commission.
- Listing Brokerage and Selling Brokerage both sign.

Upon the close of the above referenced escrow, Escrow Holder will pay from the commission due the listing broker the following disbursement:

The Selling Agency 1000 Selling Way Anywhere, CA 99999 Attn: Sammy T. Selling	\$ 9,700.00
TOTAL COMMISSION BEING PAID:	\$ 9,700.00

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

LISTING BROKER ACKNOWLEDGMENT:

The Listing Agency

Broker's Signature
License No. _____

Date

SELLING BROKER ACKNOWLEDGMENT:

THE UNDERSIGNED HEREBY ACKNOWLEDGE RECEIPT OF A COPY HEREOF.

The Selling Agency

Broker's Signature
License No. _____

Date

Affected item(s):

SSCORPD5961.doc - Commission Clarification

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<i>DSG Updates (8)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	DSG	INC240293286 / INC240293272 / INC240293224 / INC240293224 / INC240293037 / INC240293000	829063
Various updates to match versions provided. Please render to view in full.			
<u>Affected item(s):</u> SSCORPD5778.doc - Letter (DSG) SSCORPD5947.doc - Letter (DSG Resign) SSCORPD5951.doc - Letter (DSG Interplead Notice) SSCORPD5952.doc - Letter (DSG Status - Purchase) SSCORPD5953.doc - Letter (DSG Status - Holdback) SSCORPD5956.doc - Letter (DSG EMD Release - 120 Day Notice) CO Only SSCORPD5957.doc - Letter (DSG General Enclosures) SSCORPD5958.doc - DSG Review Sheet			

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Title

ALTA 33-06 - Disbursement

New/Mod Change Request	Requested By CA\SOC	Incident No.	TFS No. 828884
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The ALTA 33-06 Disbursement endorsement has been modified to provide an additional field for item 3 to enable amended Schedule B items to be shown for Part I and Part II. As standard, users may either enter the information in the custom fields or can add Exceptions (Part I) and/or Subordinate Matters (Part II) on the Endorsements screen.

Note: Exception items may also be pulled in for item 2 Schedule A amendments, so a prompt is provided for both A and Schedule B Part I, however, Part II Subordinate Matters will simply pull in from the Endorsements screen without prompting.

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INTEGRATIONS

smartview Order Synch

New/Mod Mod	Requested By	Incident No.	TFS No.
<p>**Applicable to ALL STATES except FL.</p> <p>This release includes:</p> <ul style="list-style-type: none"> • Only a Property Unit number is sent to smartview when the value in Unit is not already within Address Line 1 or Address Line 2. • The following have been added: <ul style="list-style-type: none"> ○ Index added to the Order Synch log to allow for an easier purge process. Ability to index on the Date (versus reading every row in the table). ○ Mapping of the Select Other contact type to smartview Participant Roles. If the Select Other Contact exactly matches the smartview Participant Role, it is associated within smartview. <p>The available smartview Participant Roles for Other are:</p> <div data-bbox="379 925 716 1171" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p>Other Other - Customer Service Other - Home Warranty Other - Loan Processor Other - Notary Other - Radon Inspector Other - Relocation Company Other - Transaction Coordinator</p> </div> <p>An Other Contact containing the string Notary, is mapped to the Other – Notary in smartview.</p> <ul style="list-style-type: none"> • When a Fidelity operation has been configured to not have a new smartview order created when the ProForm Order’s Owing Profile has been revised, the ProForm Order remains linked to the existing smartview order, if one exists. <p>If a smartview Order does not exist when the Owing Profile is updated, a new smartview order is created in the Office ID of the revised Owing Profile.</p> <p>NOTE: If the user is not assigned in smartview to the Office ID of the revised Owing Profile, they will not be able to publish documents to that smartview order.</p> <ul style="list-style-type: none"> • When a Fidelity operation has been configured to not have a new smartview order created when the ProForm Order’s Owing Profile is revised, a Note is created in the smartview order each time it is revised.. 			

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REPORTS

<i>1099-S Exceptions by Branch, Escrow Officer/Closer</i>			
New/Mod Change Request	Requested By DSG Admin	Incident No.	TFS No. 827287
Updated Branch column label to "Branch Nickname" and added Branch column for the Excel export.			
Affected item(s): SSCORP0001.rpt - 1099-S Exceptions by Branch, Escrow Officer/Closer			

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<i>Closed Orders by Revenue Operation</i>			
New/Mod Change Request	Requested By FNT Vent Admin	Incident No.	TFS No. 825989
Updated Group by option to add "Branch, Transaction Type, Order Type".			
Affected item(s): SSCORP5276.rpt - Closed Orders by Revenue Operation			

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<i>Invoice Aging</i>			
New/Mod Change Request	Requested By TN/KY Agency	Incident No.	TFS No. 824691
Added "Customer-facing - Brief (enter dates)" version to the Report Type.			
Affected item(s): SSCORP5036.rpt - Invoice Aging			

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<i>Ledger Transfer Activity</i>			
New/Mod Change Request	Requested By LT SoCal Escrow Admin	Incident No.	TFS No. 824489
Updated to show EO & Branch data when the report is run for revenue ledger transfers.			
Affected item(s): SSCORP0017.rpt - Ledger Transfer Activity			

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<i>Opened/Closed Pipeline Commercial</i>			
New/Mod Change Request	Requested By Config Team & SW Ops	Incident No.	TFS No. 826784
Updated the Excel option to be a dropdown to accommodate the Southwestern CPF.			
Affected item(s): SSCORP5382.rpt - Opened/Closed Pipeline Commercial			

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Order Tasks by Order Date

New/Mod	Requested By	Incident No.	TFS No.
Change Request	Reports Team / Support		825953
Updated to add Branch Flash Code with improved performance for wider date ranges.			
Affected item(s): SSCORP5475.rpt - Order Tasks by Order Date			

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Order Tasks by Task Dates

New/Mod	Requested By	Incident No.	TFS No.
Fix	Reports Team/Support		825951
Updated to add Branch Flash Code with improved performance for wider date ranges.			
Affected item(s): SSCORP5474.rpt - Order Tasks by Task Dates			

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Settlement Statements (CSS)

New/Mod	Requested By	Incident No.	TFS No.
Change Request	Config		824664
Added "DNS:" logic as an option, to hide text in the RE: field. To do so, "DNS:" can be added before the text in question to suppress it from showing on the statements.			
Affected item(s): SSCORPD3006.spdoc - Master Statement (CSS) SSCORPD3007.spdoc - Buyer/Borrower Statement (CSS) SSCORPD3008.spdoc - Seller's Statement (CSS) SSCORPD3009.spdoc - Individual Statement (CSS) SSCORPD3010.spdoc - Property Statement (CSS)			

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Single Ledger Balance Report

New/Mod	Requested By	Incident No.	TFS No.
Change Request	Reports Team		819810
Updated Doc Tree version with a parameter to opt to show the new Transaction Note added in the register, per transaction.			
Affected item(s): SSCORP5119.rpt - Single Ledger Balance Report			

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ARIZONA

DOCUMENTS

Escrow

<i>Mitek Flyer (GCTA - LT)</i>			
New/Mod	Requested By	Incident No.	TFS No.
New Request	Grand Canyon Title Agency and Lawyers Title	INC240285141	827202
New document. Please render to view in full.			
Affected item(s): AZD1479.doc - Mitek Flyer (GCTA - LT)			

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<i>Payoff Authorization</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	System Admin		825802
Fixed typo to correctly reference "FNTG/NVEPUI".			
Affected item(s): SSCORPD5714.doc - Payoff Authorization			

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<i>Payoff Authorization (esign)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	FNTG EPU AZ		828256
Added new sentence: A photocopy or electronic signature on the authorization may be accepted as an original.			
Affected item(s): SSCORPD5654.doc - Payoff Authorization (esign)			

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CALIFORNIA

DOCUMENTS

Escrow

<i>Preliminary Report (2)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	Bay Area EPU		828253
Corrected to add the signer's names to the signature section.			
Affected item(s): SCA0002402.doc - Preliminary Report (2006) SCA0002997.doc - Preliminary Report (2023)			

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<i>Sale EI doc sweep</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	Lawyer's Title SoCal		826396
Updating to add Seller/Buyer names to page 1, please render in full.			
Affected item(s): SCA0000064.doc - EI CAR Amendment (EIS) SCA0000315.doc - EI Commercial Sale (EIS) SCA0000106.doc - EI Sale (EIS) SCA0002233.doc - EI Sale (Buyer and Seller) (EIS) SCA0002537.doc - EI Sale HUD Division (EIS)			

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<i>Terms of Privately Held Loan</i>			
New/Mod	Requested By	Incident No.	TFS No.
New Request	Central Coast		827449
New document for Central Coast offices only. Please render to view in full.			
Affected item(s): SCA0003189.doc - Terms of Privately Held Loan			

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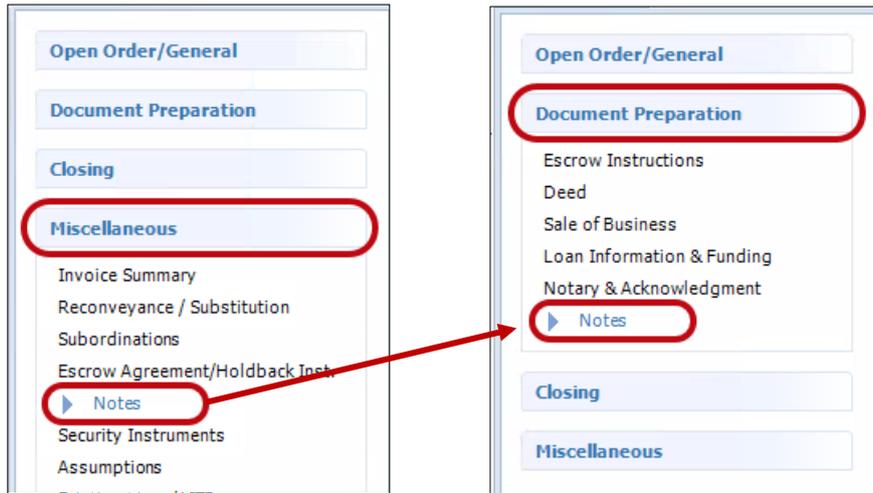
MY SCREENS

Notes Screen

New/Mod MOD	Requested By Kim Dawson	Incident No.	TFS No.
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The **Notes** screen has been moved from the **Miscellaneous** section to the **Document Preparation** section.

This change is visible when the **My Screens > SoCal Escrow Screens LT** is selected.



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REPORTS

<i>Builder Report</i>			
New/Mod	Requested By	Incident No.	TFS No.
New Request	CT SoCal Admin		827281
New Report for LT SoCal - Ventura.			
Affected item(s): SSCORP5607.rpt - Builder Report			

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<i>Data Download</i>			
New/Mod	Requested By	Incident No.	TFS No.
Fix	Reports		829239
Programming Notes corrected to read, Transaction Type "Other" excluded.			
Affected item(s): SSCORP5577.rpt - Data Download			

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<i>Data Download</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	Config Team		828240
Added column "Additional Description" for LT SoCal profiles only.			
Affected item(s): SSCORP5577.rpt - Data Download			

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<i>EPU Reports</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	LT SoCal Admin		816361
Updated as follows:			
<ol style="list-style-type: none"> 1. Added checkbox parameter "Use Requested Date." when Checked, tasks with a requested dated will show, instead of tasks with a completed date. 2. For LT SoCal, "CA-LTIC SoCal EPRO Tasks" tasks and columns have been updated. 			
Affected item(s): SSCORP5149.rpt - EPU Task Summary/Productivity by County Manager SSCORP5150.rpt - EPU Task Summary/Productivity by Employee SSCORP5152.rpt - EPU Trends			

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Orders by {Selection}

New/Mod Change Request	Requested By LT SoCal Admin	Incident No.	TFS No. 825980
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Updated for LT SoCal to look at Custom Field "**Order.AdditionalDescription_FNF#**" for "Title & Escrow" when the Order Type is "Title Only".

IF Additional Description shows "Title & Escrow" and the Order Type is "Title Only" then the file will be counted as "Title & Escrow"

Affected item(s):

SSCORP5082.rpt - Orders by {Selection}

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COLORADO

DOCUMENTS

Escrow

<u>CLDA/Builder Procedure updates</u>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	Heritage Title/Chicago Title CO		828330
<p>Updated for Chicago Title and Heritage Title only:</p> <ul style="list-style-type: none"> - Notice by Disburser and Builder's Outline of Procedures and Approval are optional additions to the Agreement (Construction Loan Disbursement). - Notice by Disburser changed to give a prompt for the General Contractor - Builder's Outline of Procedures and Approval has verbiage updates. <p>Affected item(s): COD1030.doc - Notice by Disburser COD1091.doc - Agreement (Construction Loan Disbursement) COD1092.doc - Builder's Outline of Procedures and Approval</p>			

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<u>EI - Holdback (EIS)</u>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	Heritage Title Co.	INC240274777	827190
<p>Updated to reflect the filing fee of \$150.00 and removed Address/Phone from the signature section.</p> <p>Affected item(s): COD1169.doc - EI - Holdback (EIS)</p>			

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<u>Tax Water and Assessment Agreement</u>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	Heritage Title		828311
<p>Added the following note for properties in the City and County of Denver:</p> <p>NOTE: For properties located in the City and County of Denver, Purchaser must contact Solid Waste Management at (303)446-3733 to set up an account.</p> <p>Affected item(s): COD1356.doc - Tax Water and Assessment Agreement COD1033.doc - Tax Water and Assessment Agreement (Legal)</p>			

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<u>Well Transfer Form with Instructions</u>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	Heritage Title		827296
<p>Added prompt asking user to include the "INSTRUCTIONS FOR TITLE COMPANIES/SETTLEMENT AGENTS" page.</p> <p>Affected item(s): COD1166.doc - Well Transfer Form with Instructions</p>			

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<i>WireSafe Fraud Alert with Wire Instructions (Lender Only) (CO)</i>			
New/Mod Change Request	Requested By Heritage Title Co.	Incident No.	TFS No. 827953
The Colorado Springs address has been updated from 1975 Research to 5755 Mark Dabling. The other Colorado Springs office has been removed along with the Delta/Montrose and Grand Junction offices.			
<u>Affected item(s):</u> COD1278.doc - WireSafe Fraud Alert with Wire Instructions (Lender Only) (CO)			

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ValueCheck Property Search

New/Mod Mod	Requested By	Incident No.	TFS No.
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This release includes the following:

- Functionality updated to include import of multiple properties
 - Importing new properties

New properties can be imported two ways:

- The **ValueCheck Property Search Results** dialog when an order does not contain existing properties.

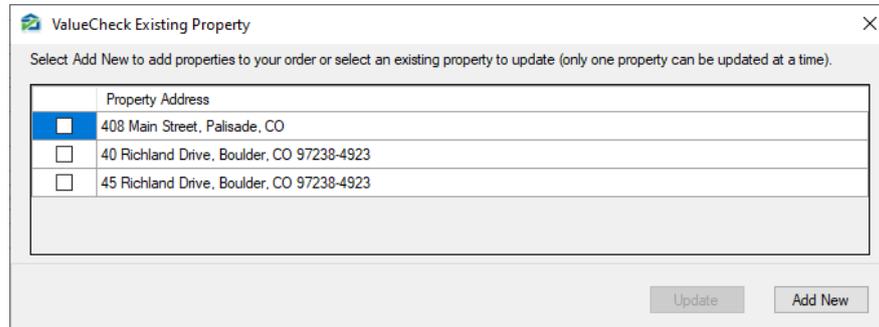
- The **ValueCheck Existing Properties** dialog when an order contains one or more existing properties.

- One or multiple properties can be imported simultaneously.
- When properties exist in the order, new properties will be added below the last property in the Properties grid.
- If “placeholder” properties exist in the order (i.e., Address Line 1 is not populated), new properties will be imported into those property objects before new property objects are added.

- Updating existing properties

ValueCheck Property Search

- The property to update must be selected from the **ValueCheck Existing Property** dialog.



- Once the property is selected in the grid the **Update** button is enabled; only one property can be updated at a time.

NOTE: If the **Add New** button is clicked when a property is selected, an error message is displayed citing, ***A property cannot be added when a property in the grid is selected to be updated.***

- Clicking the **Update** button opens the ValueCheck Property Search Result dialog and the user clicks the **Search** button to continue.
 - Only one property can be updated at a time. To update multiple properties, the user needs to update a property then launch the dialog again using the toolbar button to update the next property.
 - When a property is updated, the tool resets all supported ValueCheck fields and the new data is imported. Fields not supported by ValueCheck are not reset.
 - The **APN/Parcel ID**, **Tax/Map ID**, and **Escrow Brief Legal** check boxes are only reset if the associated check boxes are checked on the ValueCheck Property Search result dialog.
- Importing owners with multiple properties

Rules for importing owners when the order,

- Contains no existing properties and no existing contacts
 - One property – Order contacts are created
 - Multiple properties – Order contact(s) are created for the first property being imported; an Order Note is created listing all other properties and owners
 - Contains no existing properties but contains one or more contacts
 - One property – If the **Name** field is empty for one or more existing contacts, owner(s) are imported into those empty contacts before new contacts are created.
 - Multiple properties – If the **Name** field is populated, an **Order Note** is created listing the property and owners
 - Contains one or more existing properties – An order containing one or more existing properties, an **Order Note** is created
- Importing order note details with multiple properties

When an **Order Note** is created,

ValueCheck Property Search

- The full property address and it's respective owners are listed.
- If multiple properties are being imported, an empty line separates each property.
- The default settings are:
 - **Category** check boxes are checked for **Title** and **Escrow**
 - **Note Type = Information**
 - **Internal** check box is checked
 - **Display when order is opened** check box is checked - each time the order is opened the **Note Alerts** window is displayed.
 The **Do not display messages again** check box must be checked to prevent it from displaying.
- If the user's **Note** permission is set to **Deny**, the contents of the note in the **Edit Note** dialog is disabled.
- If the user's **Note Alert** permission is set to **Deny**, the **Display when order is opened** check box is defaulted as checked and is disabled. The message is displayed to all users each time the order is opened until a manager with permission to this check box clears the alert by checking the **Do not display messages again** on the Alert.

RESOLVED: Property address not populating until navigating to a different screen.

RESOLVED: Property address no longer populates in the Buyer/Borrower or Seller Contacts as Current Address or Forwarding Address when selected.

RESOLVED: When pulling in property information that includes Buyer/Borrower and Seller names that are organizations, the Organization Type reverts to Corporation and does not retain the original information selected in the order.

RESOLVED: The Property type is being updated on import.

RESOLVED: The Print as attachment check box for the legal description is unchecked on import.

RESOLVED: The Check to exclude Parcel and/or Tax ID from legal description changed from Yes to No.

RESOLVED: Fees tied to a property are removed (e.g., HOA Fees to Property 1) .

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PHRASES

<i>repr02 / Repair Escrow</i>			
New/Mod Change Request	Requested By Heritage Title Co.	Incident No. INC240274777	TFS No. 827190
Revised for the text in #7: Any remaining balance shall be disbursed to the depositing party at the following address: most recent address of such party shown on the records of the Escrow Agent.			

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INTEGRATIONS

<i>smartview Accounting Forms</i>			
New/Mod	Requested By	Incident No.	TFS No.
New			
Installation of smartview Accounting Forms v1.5.1.0.			
This integration allows for the automatic publication of transaction forms and reports when a transaction is posted or adjusted or the Order Status is changed to Closed or Completed .			

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GEORGIA

DOCUMENTS

Title

<i>ALTA 41-06 - Water - Buildings - REMOVED</i>			
<i>ALTA 41.1-06 - Water - Improvements - REMOVED</i>			
<i>ALTA 41.2-06 - Water - Described Improvements - REMOVED</i>			
<i>ALTA 41.3-06 - Water - Land Under Development - REMOVED</i>			

New/Mod	Requested By	Incident No.	TFS No.
Change Request	GA State Counsel		828196

At the direction of State Underwriting counsel, the ALTA 41-06 (Water) series of endorsements are being removed from availability for the state of Georgia where they were erroneously appearing. These are not filed endorsements for GA and counsel has specified that they do not apply to Georgia properties.

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HAWAII

DOCUMENTS

Escrow

<i>Demand (Maint-Assoc-Sewer)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	Title Guaranty		825639
<p>1. Items 1-6 change the work "for" to "per"; and after the word "to" add the word "Date:"</p> <p>2. Item 8 add "covering the period of _____"</p>			
<p>Affected item(s): HID1389.doc - Demand (Maint-Assoc-Sewer)</p>			

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<i>Escrow Instruction Without Title Insurance</i>			
New/Mod	Requested By	Incident No.	TFS No.
New Request	Title Guaranty		829102
<p>New document. Please render to view in full.</p>			
<p>Affected item(s): HID1447.doc - Escrow Instruction Without Title Insurance</p>			

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<i>Form IBA Instructions - Project</i>			
New/Mod	Requested By	Incident No.	TFS No.
New Request	Title Guaranty		827308
<p>New document. Please render to view in full.</p>			
<p>Affected item(s): HID1446.doc - Form IBA Instructions - Project</p>			

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<i>Letter (HOA Closing)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	FT Hawaii		827301
<p>Added statement referencing enclosures included.</p>			
<p>Affected item(s): SSCORPD1350.doc - Letter (HOA Closing)</p>			

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<i>Letter (Prelim Report to Seller-Seller Agent)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	Title Guaranty		827961
<p>Updated to remove the paragraph "Escrow needs the following information..." when the 'Need Payoff Lender's Name and Loan No.' prompt is checked. Also, changed "paper" to "paperwork".</p>			
<p>Affected item(s): HID1188.doc - Letter (Prelim Report to Seller-Seller Agent)</p>			

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RELEASE NOTES

AUGUST 2024

Letter (RPT Closing)			
New/Mod Change Request	Requested By FT HI	Incident No.	TFS No. 827958
Removed enclosures prompt.			
Affected item(s): HID1445.doc - Letter (RPT Closing)			

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REPORTS

<i>Hawaii Info Request Report</i>			
New/Mod New Request	Requested By HI Escrow Admin	Incident No.	TFS No. 822647
New Report for Hawaii Ops.			
Affected item(s): SSCORP5605.rpt - Hawaii Info Request Report			

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IDAHO

DOCUMENTS

[Escrow](#)

Assessment Request			
New/Mod Change Request	Requested By FT ID	Incident No.	TFS No. 828250
Updated email for the City of Kuna Assessment Request.			
Affected item(s): IDD1121.doc - Assessment Request			

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ILLINOIS

DOCUMENTS

Escrow

<u>Closing Confirmation (LT)</u>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	CT NW IN		829104
Added Michigan City to the dropdown selections for the closing location.			
Affected item(s): IND1022.doc - Closing Confirmation (LT)			

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<u>Money Market Account</u>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	St. Louis Title	INC240283237	827115
Updated escrow office name to prompt for St. Louis Title.			
Affected item(s): ILD0502.doc - Money Market Account			

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<u>Payoff Letter Authorization</u>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	CT Downstate	INC240301204	829082
Revised "Phone No.:" to "Lender Phone No.:"			
Affected item(s): ILD0077.doc - Payoff Letter Authorization			

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<u>Statutory Short Form Power of Attorney for Property</u>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	St. Louis Title		828307
Updated to match most recently provided version.			
Affected item(s): ILD0096.doc - Statutory Short Form Power of Attorney for Property			

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INDIANA

DOCUMENTS

Escrow

<i>ABA (Homebase Title)</i>			
New/Mod	Requested By	Incident No.	TFS No.
New Request	CT Indiana (Indy Metro)		827224
New document. Please render to view in full.			
Affected item(s): IND1372.doc - ABA (Homebase Title)			

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<i>Closing Info Request (FNT NWI)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	FT NW Indiana		827098
Added new custom fields, please render to view.			
Affected item(s): IND1357.doc - Closing Info Request (FNT NWI)			

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INTEGRATIONS

FNTG Order Placement

New/Mod New	Requested By	Incident No.	TFS No.
Installation of FNTG Order Placement Tool v1.14.0.0 This integration assists users in placing order with the FNTG external system.			

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MICHIGAN

INTEGRATIONS

FNTG Order Placement

New/Mod New	Requested By	Incident No.	TFS No.
Installation of FNTG Order Placement Tool v1.14.0.0 This integration assists users in placing order with the FNTG external system.			

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MINNESOTA

INTEGRATIONS

FNTG Order Placement

New/Mod New	Requested By	Incident No.	TFS No.
Installation of FNTG Order Placement Tool v1.14.0.0 This integration assists users in placing order with the FNTG external system.			

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MISSOURI

DOCUMENTS

Escrow

<i>Affidavit (Marital Status)</i>			
New/Mod Change Request	Requested By Security Title	Incident No.	TFS No. 829100
Added date to the first paragraph.			
Affected item(s): MOD1072.doc - Affidavit (Marital Status)			

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<i>Escrow Indemnity</i>			
New/Mod New Request	Requested By St. Louis Title	Incident No.	TFS No. 827955
New document. Please render to view in full.			
Affected item(s): MOD1264.doc - Escrow Indemnity			

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<i>Marital Rights Waiver</i>			
New/Mod Change Request	Requested By St. Louis Title	Incident No.	TFS No. 829098
Document will render with the legal in the body for St. Louis title.			
Affected item(s): MOD1123.doc - Marital Rights Waiver			

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REPORTS

<i>SPAdmin-Custom Source of Business Export & Missing Fields</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	FNF i Reports Admin		824684
Updated as follows:			
<ol style="list-style-type: none">1. County Operation name for FSTL = ST LOUIS OPS2. County Manager name for FWAC and FSSE flash codes3. County Operation name for FLAT flash code4. Added new County Operation for FMON flash (FNT MONTANA SOUTH)			
Affected item(s):			
SSCORP5255.rpt - SPAdmin-Custom Source of Business Export			
SSCORP5268.rpt - SPAdmin-Custom Source of Business Export-Missing Fields			

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MONTANA

DOCUMENTS

Escrow

<i>Agreement (Construction Disbursement)</i>			
New/Mod Change Request	Requested By MT State Counsel	Incident No.	TFS No. 827472
New version of the document. Please render to view.			
Affected item(s): MTD0231.doc - Agreement (Construction Disbursement)			

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Title

ALTA Commitment 2016 (MT) ALTA Commitment 2021 (MT)			
New/Mod Change Request	Requested By MT	Incident No.	TFS No. 828867
Issuing Office information has been updated to pull in the name, phone and email from the Main Contact in the People grid for the Title Company contact, if present, otherwise it behaves as usual.			
Affected item(s): MTD0194.doc - ALTA Commitment 2016 (MT) MTD0209.doc - ALTA Commitment 2021 (MT)			

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REPORTS

SPAdmin-Custom Source of Business Export & Missing Fields

New/Mod Change Request	Requested By FNFi Reports Admin	Incident No.	TFS No. 824684
----------------------------------	---	---------------------	--------------------------

Updated as follows:

1. County Operation name for FSTL = ST LOUIS OPS
2. County Manager name for FWAC and FSSE flash codes
3. County Operation name for FLAT flash code
4. Added new County Operation for FMON flash (FNT MONTANA SOUTH)

Affected item(s):

SSCORP5255.rpt - SPAdmin-Custom Source of Business Export
SSCORP5268.rpt - SPAdmin-Custom Source of Business Export-Missing Fields

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RELEASE NOTES

AUGUST 2024



NEBRASKA

DOCUMENTS

[Escrow](#)

Affidavit (Form 521-AFF)			
New/Mod New Request	Requested By NE Counsel	Incident No.	TFS No. 829089
New document. Please render to view in full.			
Affected item(s): NED1007.doc - Affidavit (Form 521-AFF)			

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NEVADA

DOCUMENTS

Escrow

<i>Annexation - Presley Place</i>			
New/Mod	Requested By	Incident No.	TFS No.
New Request	NV		829095
New document. Please render to view in full.			
Affected item(s): NVD1467.doc - Annexation - Presley Place			

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<i>Payoff Authorization</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	System Admin		825802
Fixed typo to correctly reference "FNTG/NVEPUI".			
Affected item(s): SSCORPD5714.doc - Payoff Authorization			

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<i>Revocation of Deed Upon Death</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	TT Las Vegas		827112
Hardcoded the information for the percentage being transferred, the appropriate exemption for number 4 and the reason of the exemption.			
Affected item(s): NVD1062.doc - Revocation of Deed Upon Death			

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INTEGRATIONS

NY Tax Tool

New/Mod Mod	Requested By	Incident No.	TFS No.
<p>This release includes:</p> <ul style="list-style-type: none">The Property Type field on the Post NY Taxes dialog is a required field and only displays those Types that exist in the NY Tax Tool configured Property Type Categories as well as the Property Type drop-down list editor. <p>If the option in the Property Type field located on the Property screen is not a configured property type in the Property Type Categories, it will not default on the NY Taxes dialog. Updating the Property Type on the Post NY Taxes dialog, updates the Property Type field located on the Property screen.</p> <p>NOTE: The Integration version number (v4.0.0.0) has been updated to conform to the Custom Development version numbering (as opposed to the Select version number).</p>			

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NEW YORK

INTEGRATIONS

NY Tax Tool

New/Mod Mod	Requested By	Incident No.	TFS No.
<p>This release includes:</p> <ul style="list-style-type: none">The Property Type field on the Post NY Taxes dialog is a required field and only displays those Types that exist in the NY Tax Tool configured Property Type Categories as well as the Property Type drop-down list editor. <p>If the option in the Property Type field located on the Property screen is not a configured property type in the Property Type Categories, it will not default on the NY Taxes dialog. Updating the Property Type on the Post NY Taxes dialog, updates the Property Type field located on the Property screen.</p> <p>NOTE: The Integration version number (v4.0.0.0) has been updated to conform to the Custom Development version numbering (as opposed to the Select version number).</p>			

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NORTH CAROLINA

DOCUMENTS

[Escrow](#)

[EI - Interest Bearing Accounts \(2\)](#)

New/Mod	Requested By	Incident No.	TFS No.
Change Request	CT Charlotte		827094
Updated to include "Other" as an option for this form.			
Affected item(s): SSCORPD5445.doc - EI - Interest Bearing Accounts SSCORPD1844.doc - EI - Interest Bearing Accounts (Legal)			

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OHIO

DOCUMENTS

Escrow

<i>ACT ABA Enterprise</i>			
New/Mod New Request	Requested By CT OH	Incident No.	TFS No. 827987
New document. Please render to view in full.			
Affected item(s): OHD1483.doc - ACT ABA Enterprise			

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<i>ACT ABA OH CT TriCity</i>			
New/Mod New Request	Requested By CT OH	Incident No.	TFS No. 825430
New document. Please render to view in full.			
Affected item(s): OHD1482.doc - ACT ABA OH CT TriCity			

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<i>IBA Service Form (Capital One)</i>			
New/Mod New Request	Requested By CT OH	Incident No.	TFS No. 827965
New document. Please render to view in full.			
Affected item(s): OHD1484.doc - IBA Service Form (Capital One)			

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INTEGRATIONS

FNTG Order Placement

New/Mod New	Requested By	Incident No.	TFS No.
<p>Installation of FNTG Order Placement Tool v1.14.0.0</p> <p>This integration assists users in placing order with the FNTG external system.</p>			

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OKLAHOMA

DOCUMENTS

Escrow

<i>Affiliated Business Arrangement Disclosure Statements (2)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	CTI OK		827446
Added a text custom field for the ERecording Services.			
Affected item(s): SSCORPD5927.doc - Affiliated Business Arrangement Disclosure Statement SSCORPD5945.doc - Affiliated Business Arrangement Disclosure Statement (esign)			

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<i>Federal Court - Bankruptcy Check</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	FirsTitle		825428
Updated to pull buyer/borrower for refinances or when the seller is left empty.			
Affected item(s): OKD1295.doc - Federal Court - Bankruptcy Check			

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OREGON

DOCUMENTS

Escrow

<i>EI - Lender's (EIS) (2)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	WT Bend		829060
Added prompt to make the insurance paragraph optional.			
Affected item(s): ORD1441.doc - EI - Lender's (EIS) ORD1023.doc - EI - Lender's (EIS - Legal)			

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<i>Judgement Satisfaction (8)</i>			
New/Mod	Requested By	Incident No.	TFS No.
New Request	Ticor Title		827083
Created letter versions of these documents.			
Affected item(s): ORD1532.doc - Full Satisfaction (Judgment) ORD1254.doc - Full Satisfaction (Judgment) - Legal ORD1533.doc - Full Satisfaction (Support Judgment) ORD1475.doc - Full Satisfaction (Support Judgment) - Legal ORD1534.doc - Partial Satisfaction (Judgment) ORD1255.doc - Partial Satisfaction (Judgment) - Legal ORD1535.doc - Partial Satisfaction (Support Judgment) ORD1256.doc - Partial Satisfaction (Support Judgment) - Legal			

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<i>Notice (Completion)</i>			
New/Mod	Requested By	Incident No.	TFS No.
New Request	Western Title		827080
Created a letter version of this document.			
Affected item(s): ORD1513.doc - Notice (Completion)			

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UTAH

DOCUMENTS

Title

[Commitment update \(4\)](#)

New/Mod Change Request	Requested By FT and CT Utah	Incident No.	TFS No. 828296
----------------------------------	---------------------------------------	---------------------	--------------------------

Updating the Commitment to remove the Title Officer's name and phone number from the Issuing Office section on Schedule A for FT and CT Utah operation only.

ISSUING OFFICE:	FOR SETTLEMENT INQUIRIES, CONTACT:
<div style="border: 2px solid red; padding: 5px;"> <p>Title Office Name 1000 Title Avenue, Suite 500 Greenville, UT 99999 Mail Phone: (800)111-2222 Email: UT-FNT-TitleTeam@fnf.com</p> </div>	<p>Escrow Officer: Melissa G Smith Escrow Office Name 100 Escrow Office Street EO City, UT 54545 Phone: (888)222-3333 Fax: (888)444-5555 Main Phone: (800)777-4444 Email: msmith@email.email</p>

Affected item(s):

- UTD1002.doc - ALTA Commitment 2016 (UT)
- UTD1036.doc - ALTA Commitment 2016 (UT) without Jacket
- UTD1008.doc - ALTA Commitment 2021 (UT)
- UTD1037.doc - ALTA Commitment 2021 (UT) without Jacket

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WASHINGTON

DOCUMENTS

Escrow

<i>Affiliated Business Arrangement Disclosure Statement</i>			
New/Mod Change Request	Requested By TT Renton and CT Olympia	Incident No.	TFS No. 829093
Updated document for CT Olympia and TT Renton to reflect "document*" in place of "order*".			
<u>Affected item(s):</u> SSCORPD5927.doc - Affiliated Business Arrangement Disclosure Statement			

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Order Transactions Screen

New/Mod MOD	Requested By Penny Hoskins	Incident No.	TFS No.
-----------------------	--------------------------------------	---------------------	----------------

The **Stmt./HUD Amount** screen has been replaced with the **Order Transactions** screen.

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

- › **Washington Commercial Screens** – located in the **Miscellaneous** screens section
- › **Washington Escrow Screens** – located in the **Closing** screens section
- › **Washington Screen List** – located in the **Closing** screens section

Order Transactions

CDF	Code	Name	Amount	Details
1	BA	Bobbi Buyer	\$1,229.40	From Buyer
1	SA	Sissy Seller	\$235.00	From Seller

Order Transactions

CDF	Code	Name	Amount
1	BA	Bobbi Buyer	\$1,229.40
1	SA	Sissy Seller	\$235.00

Σ

CDF	Code	Name
1	O2	Counters On Stand By
1	T2	Fidelity National Title Company of Washington, Inc.
1	A	Fidelity National Title Company of Washington, Inc.
1	O3	Notaries R Us

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REPORTS

<i>Order Count/Revenue Summary</i>			
New/Mod Change Request	Requested By PacNW IT	Incident No.	TFS No. 825638
Updated to remove Bill Codes SEA, RCN, PLT and PLO permanently for Vancouver when using "Use Alternate Bill Codes".			
Affected item(s): SSCORP5092.rpt - Order Count/Revenue Summary			

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WISCONSIN

DOCUMENTS

Title

<i>Commitment to Issue Mortgage Modification and Date Down (SE390-06)</i>			
New/Mod New Request	Requested By CT Wisconsin Commercial	Incident No.	TFS No. 827764
Updated to add a parcel reference field for #10.			

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<i>SE 393-06 - Modification and Date Down Endorsement</i>				
New/Mod Change Request	Requested By CT Wisconsin Commercial	Incident No.	TFS No. 827768	
Removed the "We should be furnished with the following:" section, per state counsel instruction.				
<table border="1"> <tr> <td> <p>7. Any claim of adverse possession or prescriptive easement first affecting the property since September 1, 2024.</p> <p>8. General taxes for the year 2021, unless a receipt showing full payment is presented.</p> <p>This endorsement is issued as part of the policy. Except as it expressly states, it does not (i) modify any of the terms and provisions of the policy, (ii) modify any prior endorsements, (iii) extend the Date of Policy, or (iv) increase the Amount of Insurance. To the extent a provision of the policy or a previous endorsement is inconsistent with an express provision of this endorsement, this endorsement controls. Otherwise, this endorsement is subject to all of the terms and provisions of the policy and of any prior endorsements.</p> </td> </tr> </table>				<p>7. Any claim of adverse possession or prescriptive easement first affecting the property since September 1, 2024.</p> <p>8. General taxes for the year 2021, unless a receipt showing full payment is presented.</p> <p>This endorsement is issued as part of the policy. Except as it expressly states, it does not (i) modify any of the terms and provisions of the policy, (ii) modify any prior endorsements, (iii) extend the Date of Policy, or (iv) increase the Amount of Insurance. To the extent a provision of the policy or a previous endorsement is inconsistent with an express provision of this endorsement, this endorsement controls. Otherwise, this endorsement is subject to all of the terms and provisions of the policy and of any prior endorsements.</p>
<p>7. Any claim of adverse possession or prescriptive easement first affecting the property since September 1, 2024.</p> <p>8. General taxes for the year 2021, unless a receipt showing full payment is presented.</p> <p>This endorsement is issued as part of the policy. Except as it expressly states, it does not (i) modify any of the terms and provisions of the policy, (ii) modify any prior endorsements, (iii) extend the Date of Policy, or (iv) increase the Amount of Insurance. To the extent a provision of the policy or a previous endorsement is inconsistent with an express provision of this endorsement, this endorsement controls. Otherwise, this endorsement is subject to all of the terms and provisions of the policy and of any prior endorsements.</p>				

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FIRST TITLE OF GEORGIA

DOCUMENTS

[Escrow](#)

Affidavit (Owner-Seller)			
New/Mod Change Request	Requested By First Title	Incident No.	TFS No. 827234
Various changes, please render to view in full.			
Affected item(s): FGD1042.doc - Affidavit (Owner-Seller)			

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LIBERTY TITLE

DOCUMENTS

Escrow

<i>Affidavit (Owner-Seller)</i>			
New/Mod Change Request	Requested By Liberty Title & Escrow Company	Incident No.	TFS No. 826147
Updated closing contacts to remove direct phone numbers and to update the phone number to verify wire instructions on document. Please render to view in full.			
Affected item(s): LIBD1124.doc - Closing Confirmation (IL)			

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INTEGRATIONS

NY Tax Tool

New/Mod Mod	Requested By	Incident No.	TFS No.
<p>This release includes:</p> <ul style="list-style-type: none"> The Property Type field on the Post NY Taxes dialog is a required field and only displays those Types that exist in the NY Tax Tool configured Property Type Categories as well as the Property Type drop-down list editor. <p>If the option in the Property Type field located on the Property screen is not a configured property type in the Property Type Categories, it will not default on the NY Taxes dialog. Updating the Property Type on the Post NY Taxes dialog, updates the Property Type field located on the Property screen.</p> <p>NOTE: The Integration version number (v4.0.0.0) has been updated to conform to the Custom Development version numbering (as opposed to the Select version number).</p>			

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NCS

DOCUMENTS

Escrow

<i>Third Party Deposits Sweep (4)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	Settlement		826636
Language for additional deposits along with principal acknowledgment and signatures has been added. Please render in full to view.			
Affected item(s): SSCORPD1840.doc - EI - Third Party Deposit SSCORPD5367.doc - EI - Third Party Deposit (Legal) SSCORPD5448.doc - EI - Third Party Deposit - Multiple Parties SSCORPD5451.doc - EI - Third Party Deposit - Multiple Parties (Legal)			

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<i>Wire Account Notification (NCS - Commercial)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	NCS Boston		829106
For NCS Boston only: Updated to have the option to reflect "none" for the customer name and remove the project reference field.			
Affected item(s): SSCORPD5545.doc - Wire Account Notification (NCS - Commercial)			

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NOVARE NATIONAL SETTLEMENT SERVICES

DOCUMENTS

Title

(Wyoming) Foreclosure Guarantee			
New/Mod New Request	Requested By Novare	Incident No.	TFS No. 828357
New document. Please render to view in full.			

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REPORTS

<i>Opened/Closed Order Export</i>			
New/Mod Change Request	Requested By Novare Admin	Incident No.	TFS No. 826358
Added Commercial/Residential column.			
Affected item(s): SSCORP5408.rpt - Opened/Closed Order Export			

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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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