

SOFTPRO SELECT

November 2024

RELEASE NOTES



Testing Release Date: November 1, 2024

Production Release Date: November 11, 2024

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ALL STATES/SITES

INTEGRATIONS

Rate Validation Tool

New/Mod Mod	Requested By	Incident No.	DEVOPS No.
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This release includes:

- › Support for Underwriter code to be read from SoftPro custom field.
If a value is present in the SPS custom field, the value for the underwriter is picked up from this field. If the custom field is empty, the value for the underwriter code is picked up from the lookups.

Custom Field Properties

RESOLVED: Skip Rates Verification link in the Property View is disabled when unsupported policy code is added.

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smartview Accounting Forms

New/Mod New	Requested By	Incident No.	TFS No.
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****ALL STATES EXCEPT FL, ID, MT, OR, WA.**

Installation of smartview Accounting Forms v1.5.2.0.

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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[Title Search Export](#)

New/Mod Mod	Requested By	Incident No.	DEVOPS No.
----------------	--------------	--------------	------------

****ALL STATES EXCEPT SERVICE LINK**

This release includes:

- › If the published **Document Name** in Select contains the word “prelim”, send **Document_Type = Prelim** in the XML.
- › If the **Document_Type = Owners Policy** or **Loan Policy**, send the **Policy_Printed_Doc_ID** aka FNF Policy Sequence Number in the submitted XML.
- › Internal file storage folder names specified in the **InternalFileShareBase** config setting location to include the ProForm order number.
- › Added granular logging around file transfers to the FTP site, available at debug level.
- › No longer sending Acreage field data as vendor cannot accept a string entry.
- › Added Signatures to install files.
- › Installer no longer populating data in the **DocumentConfig** or **DocumentComponentConfig** Db tables.

RESOLVED: Documents not categorized by the integration are being sent to Property Insights.

Only documents of a supported category are uploaded, even when merged with other documents of an unsupported category.

RESOLVED: Merged Prelim document not passing through to Select.

Fix ensures all merged documents containing the word “Prelim” appropriately pass through to Select’s **Publish to Order** screen.

RESOLVED: Blank Commitment Effective Dates throwing error when publishing.

RESOLVED: Blank Title Office Contacts throwing an error when publishing.

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REPORTS

<i>IBA Detail by Bank and Escrow & ProTrust version</i>			
New/Mod Change Request	Requested By PacNW IT	Incident No.	TFS No. 838153
Added option to group by 'Trust Account' and Report Programming Notes.			
Affected item(s): SSCORP5022.rpt - IBA Detail by Bank and Escrow			

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<i>Month by Month Production Summary</i>			
New/Mod Change Request	Requested By MidSoud TN & KY Admin	Incident No.	TFS No. 837315
Added Marketing Source Lookup Code to the Excel export.			
Affected item(s): SSCORP5472.rpt - Month by Month Production Summary			

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<i>Opened/Closed Orders with Contact Search</i>			
New/Mod Change Request	Requested By LT SoCal Admin	Incident No.	TFS No. 837269
Added checkbox parameter to include LB/SB License numbers, when checked, the Excel exports will have a column with their license numbers.			
Affected item(s): SSCORP5297.rpt - Opened/Closed Orders with Contact Search			

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ARIZONA

DOCUMENTS

[Escrow](#)

<i>Endorsement Addendum</i>			
New/Mod Change Request	Requested By CT AZ	Incident No. INC240402647	TFS No. 839644
Added system date to pull to the signature section.			
<u>Affected item(s):</u> AZD1323.doc - Endorsement Addendum			

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CALIFORNIA

DOCUMENTS

Escrow

<i>Commission Docs (2)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	FT NoCal		840650
Various updates. Please render to view.			
Affected item(s): SCA0001004.doc - Broker's Demand SCA0000327.doc - Commission - Seller			

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<i>Security Agreement and Promissory Note - Personal Property (consisting of 4 pages)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	FNT NoCal	INC240373437	838456
Various updates. Please render to view.			
Affected item(s): SCA0000274.doc - Security Agreement and Promissory Note - Personal Property (consisting of 4 pages) nka Security Agreement and Promissory Note - Personal Property			

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INTEGRATIONS

CSS Commercial Import Tool

New/Mod New	Requested By	Incident No.	TFS No.
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Installation of CSS Commercial Import v1.18.0.0.

This integration allows for the creation of new orders for each row in a Microsoft Excel workbook. The CSS Import Tool uses the Lookup tables beginning with the name "CSS Import Mapping" as the mapping table between the Excel workbook and Select Order fields.

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Rate Validation Tool

New/Mod Mod	Requested By	Incident No.	DEVOPS No.
-----------------------	---------------------	---------------------	-------------------

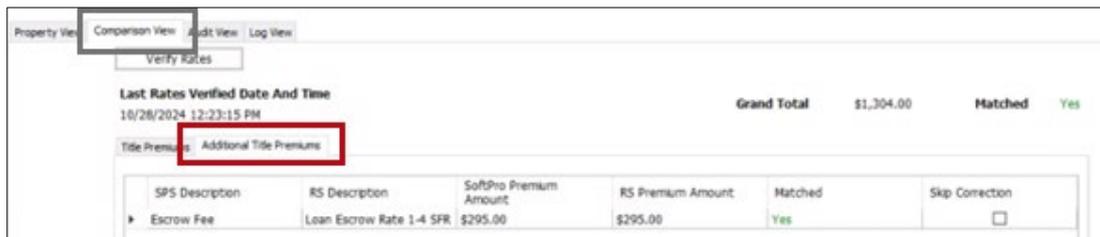
This release includes:

- › Upgrade to Feature 5.0

NOTE: This feature requires configuration. Reach out to FNFRatesTeam@softprocorp.com for a demo/configuration.

The ability to compare the escrow/ancillary supported charges from Rate Services to the charges being collected in the SoftPro order.

- » The **Comparison View** now includes a new tab, **Additional Title Premiums**, which includes the escrow/ancillary supported charges from Rate Services. This tab is always visible but is only accessible when Feature 5.0 is enabled. Navigation between the **Title Premiums** and **Additional Title Premiums** tabs is always available when applicable charges are being compared.



- » If escrow/ancillary supported charges,
 - Align with charges from Rate Services – the **Comparison View** tab continues to open on the **Title Premiums** tab.
 - Does not align with charges from Rate Services – the **Comparison View** tab opens on the **Title Premiums** tab with a **Pull** button (upper right) indicating which premium tabs do not match.

Rate Validation Tool

New/Mod Mod	Requested By	Incident No.	DEVOPS No.
-----------------------	---------------------	---------------------	-------------------



- **Pull Title & ATC Rates** - Title and Escrow/ancillary charges do not match
- **Pull Title Rates** - Only Title premiums do not match
- **Pull ATC Rates** - Only Escrow/ancillary charges do not match



- » Overwrite rates in Select order

Clicking the **Pull** button, updates the SoftPro order by pulling in the corresponding rate(s) from Rate Services and quiets the utility if the order is in a re-verification state.

If you choose not to overwrite the Select rates, the **Verify Rates** button is still available to keep the rates and provide a justification.

- » Skipping Correction

The **Additional Title Premiums** tab allows the user to skip overwriting individual charges that do not match when using the **Pull** button.

Check the applicable entry to avoid overwriting the charge(s) in Select.



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RELEASE NOTES

NOVEMBER 2024

PHRASE(S)

<u>El phrases revised for alignment (NOCAL ONLY)</u>			
New/Mod Change Request	Requested By FT NoCal	Incident No.	TFS No. 840877
<u>Code: comm02 / Commission being Paid by Seller</u> <u>Code: comm03 / Commission being Paid by Buyer</u>			
Revised so the amounts are now aligned.			

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<u>New El Phrase (NOCAL ONLY)</u>			
New/Mod New Request	Requested By FNT Sacramento	Incident No.	TFS No. 840878
Two new phrases added:			
<u>Code: assume01 / Assignee</u>			
FORMAL ASSUMPTION OF EXISTING LOAN: Buyer will assume the existing first <i>Deed of Trust</i> of record dated [Pulls Note date] , recorded [PROMPT (Enter Deed of Trust Recording Date)] as Instrument No. [PROMPT (Enter Deed of Trust Instrument No)] Official Records, County of [Pulls Property County] .			
Said <i>Deed of Trust</i> was executed by [Pulls Mortgagor] , as <u>Trustor</u> , in favor of [Pulls Mortgagee] , as <u>Beneficiary</u> , securing a <i>Note</i> in the original amount of \$[Pulls Original principal amount] .			
TERMS RELATED TO EXISTING LOAN:			
* The current unpaid Principal Balance of said Note is \$[Pulls Unpaid principal amount]			
* Interest is payable at the rate of [PROMPT (Enter Deed of Trust Interest Rate)] percent per annum and is paid to date of [PROMPT (Enter Deed of Trust Paid to Date)] .			
* Note is payable in monthly principal and interest installments of \$[PROMPT (Enter Deed of Trust Monthly Installment Amount)] with the next installment due on [PROMPT (Enter Deed of Trust Next Installment Due Date)] .			
[PROMPT (Enter Date for Installment paid from Seller Proceeds)] installment in the amount of \$[PROMPT (Enter Amount of Seller Installment)] and any late charge applicable thereto shall be paid from Seller's proceeds at close of escrow to bring said loan current. REGARDLESS OF SELLER'S PAYMENT OF THE [Pulls Month from Date entered above] 1st PAYMENT, ESCROW HOLDER IS NOT TO ADJUST THE PRINCIPAL BALANCE DEBIT/CREDIT HEREIN BETWEEN SELLER AND BUYER BY THE AMOUNT OF PRINCIPAL REDUCTION INCLUDED IN SAID [Pulls Date entered above] PAYMENT.			
Escrow holder is hereby instructed to prorate interest on the loan from date of escrow of escrow to [PROMPT (Enter Date for Proration)] and debit Buyer/credit Seller for same.			
[PROMPT (Enter Date for Installment paid from Buyer Proceeds)] installment in the amount of \$[PROMPT (Enter Amount of Buyer Installment)] shall be collected and paid from funds deposited by Buyer at close of escrow.			
APPROVAL OF NOTE, DEED OF TRUST, ETC.: The undersigned Buyers hereby acknowledge receipt, approval and acceptance of copy of the existing Note and Deed of Trust for said loan being assumed herein.			
BENEFICIARY STATEMENT: Escrow Holder shall obtain a Beneficiary Statement from the existing Lender/Beneficiary confirming the above stated unpaid principal balance, payment information and condition of said existing loan. Said statement shall also provide for Beneficiary's acceptance of the notice of transfer of ownership of subject property and Beneficiary's waiver of any acceleration in payment of said Note by reason of the transfer of ownership. Seller and Buyer shall be provided a copy of same for approval prior to close of escrow.			
NO ASSUMPTION AGREEMENT: The parties hereto acknowledge to Escrow Holder that they have elected not to have an assumption agreement or other such documentation prepared by an attorney in connection with this loan assumption and the existing lender has not provided one in connection herewith. Nevertheless, the parties hereby authorize and instruct escrow holder to proceed with the consummation of this transaction in accordance with the instructions given herein.			
<u>Code: assume02 / Assumption - Lender Approval</u>			
ASSUMPTION - LENDER APPROVAL: Buyer is assuming the liability of the existing loan as if they were the original makers thereof. You are instructed to notify the lender of record as to the desires of the parties herein with respect to the assumption of said loan and to procure from said lender the necessary documents to relieve seller of any further liability as the original maker of said loan and of any indemnity obligations that seller may have with lender. Buyer acknowledges that the terms of the note may be modified by the lender and that buyer's execution of any modification and/or assumption agreement is to be deemed as their approval of the terms and conditions contained therein.			

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REPORTS

<i>Master Settlement Statement (SubEscrow)</i>			
New/Mod Change Request	Requested By LT SoCal Admin	Incident No.	TFS No. 835960
Updated to show Payoff Sections first for LT SoCal.			
Affected item(s): H_SubEscrow_SettlementStatement_Details_FNF.spdoc			

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COLORADO

DOCUMENTS

Escrow

<i>Affidavit (Scrivener's Error)</i>			
New/Mod Change Request	Requested By Heritage Title	Incident No. INC240413520	TFS No. 840222
Annette Miller has been changed to Annette Young. Connie Malonson, Jennifer Williams, Jill Thatcher and Matthew Chambers have been deleted. Sandy Plaven has been added.			
Affected item(s): COD1062.doc - Affidavit (Scrivener's Error)			

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<i>TC Release</i>			
New/Mod Change Request	Requested By CT CO	Incident No.	TFS No. 839711
Updated drop down to add Kristina Wendling.			
Affected item(s): COD1130.doc - TC Release			

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FLORIDA

INTEGRATIONS

<i>smartview Auto Document Generation</i>			
New/Mod	Requested By	Incident No.	TFS No.
New			
<p>Installation of smartview Auto Document Generation v1.3.3.0.</p> <p>This integration allows for the automatic generation of selected documents in SoftPro Select and subsequent publication of those documents to the Select order Attachments and the corresponding smartview order.</p>			

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<i>smartview Default Folder Tool</i>			
New/Mod	Requested By	Incident No.	TFS No.
New			
<p>Installation of smartview Default Folder Tool v2.0.2.0.</p> <p>The Default Folder Tool allows mappings to be established between SoftPro documents and reports and the smartview document repository folders.</p>			

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<i>smartview DocSave</i>			
New/Mod	Requested By	Incident No.	TFS No.
Mod			
<p>This release includes:</p> <ul style="list-style-type: none"> > Application updated to be compatible with the Default Folder application by leveraging the NuGet package which includes a DLL to call its interface. > The Default Folder DLL is now embedded within DocSave and loaded by it's assembly resolver to avoid a mismatch of version numbers for this DLL that might break functionality. > If DocSave is run in an environment that does not have the Default Folder application, the message, endpoint not found is written as an information message versus an error. > If DocSave is run in an environment where the *SmartViewDocSave – DocConversion and/or *SmartViewDocSave – SearchSmartViewOrder SPAdmin groups do not exist, a Warning is written instead of an Error. If a user isn't a member of one or both groups, an information message is written. <p>RESOLVED: Prior to v1.20.0.0 when a user published a document to smartview using the Publish as Word feature, the document was published as a Word document. However, when the user downloaded the published document and attempted to edit it from smartview, the document was not auto-reformatting causing text to overwrite existing text.</p> <p>When publishing individual documents as well as when using the Merge feature, the user can now download the document from smartview and the document auto-formats when editing.</p>			

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HAWAII

DOCUMENTS

Escrow

<i>Certificate of Trust</i>			
New/Mod Change Request	Requested By FT HI	Incident No.	TFS No. 838744
Added "as authorized by Hawaii law H.R.S. § 554D-1013."			
Affected item(s): HID1002.doc - Certificate of Trust			

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ILLINOIS

DOCUMENTS

Escrow

<i>File to File Wire Transfer</i>			
New/Mod New Request	Requested By CT Metro	Incident No.	TFS No. 838770
New document. Please render to view.			
Affected item(s): ILD0618.doc - File to File Wire Transfer			

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<i>Letter (Listing - Absentee Owner)</i>			
New/Mod Change Request	Requested By CT Metro	Incident No.	TFS No. 839382
Added Mitek logo and paragraph. Please render to view.			
Affected item(s): SSCORPD5923.doc - Letter (Listing - Absentee Owner)			

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<i>Statutory Short Form Power of Attorney for Property</i>			
New/Mod Change Request	Requested By St. Louis Title	Incident No.	TFS No. 838454
Various updates. Please render to view.			
Affected item(s): ILD0096.doc - Statutory Short Form Power of Attorney for Property			

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MICHIGAN

DOCUMENTS

Title

<i>MI Mort 2-06 - Assignment of Rents (Contained in Insured Mortgage) Endorsement</i>			
New/Mod New Request	Requested By FT MI	Incident No.	TFS No. 840834
A new MI Mort 2-06 "Assignment of Rents (Contained in Insured Mortgage)" endorsement is now available for issuance on properties in the state of Michigan.			

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NEVADA

DOCUMENTS

Escrow

<i>Annexation - Presley Place</i>			
New/Mod Change Request	Requested By LT Las Vegas	Incident No.	TFS No. 840704
Removed prompt and exhibit B referencing common elements.			
Affected item(s): NVD1467.doc - Annexation - Presley Place			

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<i>Buyer to Pay Commission</i>			
New/Mod Change Request	Requested By CT NV	Incident No. INC240400773	TFS No. 839651
For CT NV only - added logic to pull the amount paid by buyer to the agent and also added License No. and Expiration Date under the agent's signature.			
Affected item(s): NVD1252.doc - Buyer to Pay Commission NVD1252.doc - Buyer to Pay Commission (Selling Agent-Broker)			

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<i>Demand Private with Request for Partial Reconveyance</i>			
New/Mod New Request	Requested By NV EPUI	Incident No.	TFS No. 838742
New document. Please render to view.			
Affected item(s): NVD1470.doc - Demand Private with Request for Partial Reconveyance			

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<i>Open Order Sheet- FNT</i>			
New/Mod New Request	Requested By FNT NV	Incident No. INC240375372	TFS No. 838768
New document. Please render to view.			
Affected item(s): NVD1471.doc - Open Order Sheet - FNT			

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Rate Validation Tool

New/Mod Mod	Requested By	Incident No.	DEVOPS No.
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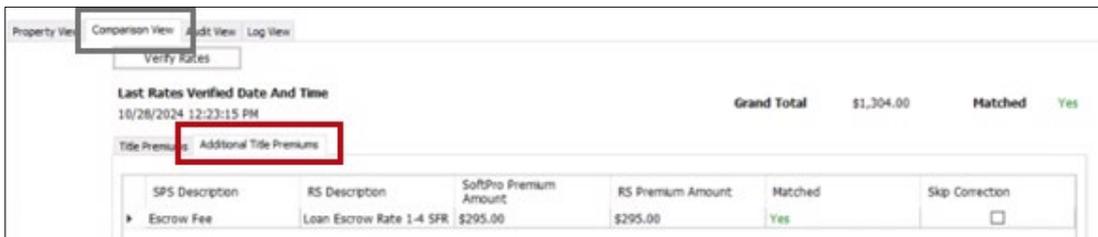
This release includes:

- › Upgrade to Feature 5.0

NOTE: This feature requires configuration. Reach out to FNFRatesTeam@softprocorp.com for a demo/configuration.

The ability to compare the escrow/ancillary supported charges from Rate Services to the charges being collected in the SoftPro order.

- › The **Comparison View** now includes a new tab, **Additional Title Premiums**, which includes the escrow/ancillary supported charges from Rate Services. This tab is always visible but is only accessible when Feature 5.0 is enabled. Navigation between the **Title Premiums** and **Additional Title Premiums** tabs is always available when applicable charges are being compared.



- › If escrow/ancillary supported charges,
 - Align with charges from Rate Services – the **Comparison View** tab continues to open on the **Title Premiums** tab.
 - Does not align with charges from Rate Services – the **Comparison View** tab opens on the **Title Premiums** tab with a **Pull** button (upper right) indicating which premium tabs do not match.



- **Pull Title & ATC Rates** - Title and Escrow/ancillary charges do not match
- **Pull Title Rates** - Only Title premiums do not match
- **Pull ATC Rates** - Only Escrow/ancillary charges do not match



- › Overwrite rates in Select order

Clicking the **Pull** button, updates the SoftPro order by pulling in the corresponding rate(s) from Rate Services and quiets the utility if the order is in a re-verification state.

Rate Validation Tool

New/Mod Mod	Requested By	Incident No.	DEVOPS No.
-----------------------	---------------------	---------------------	-------------------

If you choose not to overwrite the Select rates, the **Verify Rates** button is still available to keep the rates and provide a justification.

- » Skipping Correction

The **Additional Title Premiums** tab allows the user to skip overwriting individual charges that do not match when using the **Pull** button.

Check the applicable entry to avoid overwriting the charge(s) in Select.

The screenshot shows the 'Rate Validation Tool' interface. At the top, there are tabs for 'Property View', 'Comparison View', 'Audit View', and 'Log View'. Below these are buttons for 'Verify Rates' and 'Pull ATC Rates'. The 'Last Rates Verified Date And Time' is 10/3/2024 11:51:54 AM. The 'Grand Total (with charges/fees)' is \$5,270.00, with 'Matched' and 'No' counts. Below this is a table with columns: SPS Description, RS Description, SoftPro Premium Amount, RS Premium Amount, Matched, and Skip Correction. The 'Skip Correction' column contains checkboxes for each row.

SPS Description	RS Description	SoftPro Premium Amount	RS Premium Amount	Matched	Skip Correction
1031 Exchange	Exchange Service Fee (...)	\$250.00	\$250.00	Yes	<input type="checkbox"/>
CA Document Signing Fee	Miscellaneous Services - ...	\$100.00	\$150.00	No	<input checked="" type="checkbox"/>
FullEscrow With Owner	Residential Sale Escrow ...	\$1,446.00	\$1,446.00	Yes	<input type="checkbox"/>
FullEscrow With Owner	Residential Sale Escrow ...	\$1,446.00	\$1,446.00	Yes	<input type="checkbox"/>
IBA Fee	Miscellaneous Services - ...	\$50.00	\$50.00	Yes	<input type="checkbox"/>
Parcel Count	If the property being ns...	\$100.00	\$200.00	No	<input type="checkbox"/>

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NEW JERSEY

INTEGRATIONS

<i>Deposit Transfer Tool</i>			
New/Mod	Requested By	Incident No.	TFS No.
New			
<p>Installation of Deposit Transfer Tool v4.3.2.3.</p> <p>This integration provides the ability to create and post Ledger Transfers to one or multiple orders. Users are able to transfer funds from a source order (order receiving lump sum incoming funds) to the corresponding destination order(s) (order receiving internal fund transfer). .</p>			

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NEW MEXICO

DOCUMENTS

Escrow

<i>Affidavit (and Agreement)</i>			
New/Mod Change Request	Requested By FT NM	Incident No.	TFS No. 839363
Updated to add a custom field prompt instead of using the affidavit screen.			
Affected item(s): NMD1018.doc - Affidavit (and Agreement)			

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<i>Letter (Purchase Insured Explanation)</i>			
New/Mod Change Request	Requested By NM	Incident No.	TFS No. 839629
Removed the prompt "Select who is signing the letter" and will pull the Title Officer for "Title only" files and the Escrow Officer for all other file types. This change is being made in order to apply the Auto Doc Gen functionality.			
Affected item(s): NMD1074.doc - Letter (Purchase Insured Explanation)			

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INTEGRATIONS

smartview Auto Document Generation

New/Mod New	Requested By	Incident No.	TFS No.
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Installation of smartview Auto Document Generation v1.3.3.0.

This integration allows for the automatic generation of selected documents in SoftPro Select and subsequent publication of those documents to the Select order Attachments and the corresponding smartview order.

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NEW YORK

INTEGRATIONS

<i>Deposit Transfer Tool</i>			
New/Mod	Requested By	Incident No.	TFS No.
New			
<p>Installation of Deposit Transfer Tool v4.3.2.3.</p> <p>This integration provides the ability to create and post Ledger Transfers to one or multiple orders. Users are able to transfer funds from a source order (order receiving lump sum incoming funds) to the corresponding destination order(s) (order receiving internal fund transfer). .</p>			

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OHIO

DOCUMENTS

Escrow

<i>File Cover - Enterprise</i>			
New/Mod Change Request	Requested By CT NOH	Incident No. INC240412923	TFS No. 840325
Revised "Investor" to "Lender".			
Affected item(s): OHD1489.doc - File Cover - Enterprise			

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<i>Request for Legal Description Review (Ottawa County)</i>			
New/Mod Change Request	Requested By CT OH	Incident No.	TFS No. 839380
Document now has editing functionality throughout.			
Affected item(s): OHD1491.doc - Request for Legal Description Review (Ottawa County)			

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OKLAHOMA

DOCUMENTS

Escrow

<i>Uniform Abstract Certificate (CCA)</i>			
New/Mod Change Request	Requested By CT OK	Incident No.	TFS No. 840304
Updated to add Canadian County OAB No.			
Affected item(s): OKD1005.doc - Uniform Abstract Certificate (CCA)			

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OREGON

DOCUMENTS

Escrow

<i>Important Notice to New Property Owners</i>			
New/Mod Change Request	Requested By WT Bend	Incident No.	TFS No. 838476
Updated the dates for the first 3 bulleted items.			
Affected item(s): ORD1146.doc - Important Notice to New Property Owners			

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<i>Verification of Commission</i>			
New/Mod Change Request	Requested By Western Title	Incident No.	TFS No. 838756
Added "Principal Broker Signature" label to the signature section.			
Affected item(s): ORD1457.doc - Verification of Commission			

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Rate Validation Tool

New/Mod Mod	Requested By	Incident No.	DEVOPS No.
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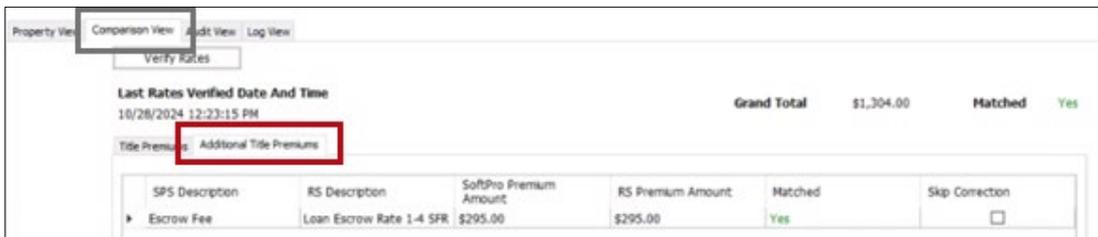
This release includes:

- › Upgrade to Feature 5.0

NOTE: This feature requires configuration. Reach out to FNFRatesTeam@softprocorp.com for a demo/configuration.

The ability to compare the escrow/ancillary supported charges from Rate Services to the charges being collected in the SoftPro order.

- › The **Comparison View** now includes a new tab, **Additional Title Premiums**, which includes the escrow/ancillary supported charges from Rate Services. This tab is always visible but is only accessible when Feature 5.0 is enabled. Navigation between the **Title Premiums** and **Additional Title Premiums** tabs is always available when applicable charges are being compared.



- › If escrow/ancillary supported charges,
 - Align with charges from Rate Services – the **Comparison View** tab continues to open on the **Title Premiums** tab.
 - Does not align with charges from Rate Services – the **Comparison View** tab opens on the **Title Premiums** tab with a **Pull** button (upper right) indicating which premium tabs do not match.



- **Pull Title & ATC Rates** - Title and Escrow/ancillary charges do not match
- **Pull Title Rates** - Only Title premiums do not match
- **Pull ATC Rates** - Only Escrow/ancillary charges do not match



- › Overwrite rates in Select order

Clicking the **Pull** button, updates the SoftPro order by pulling in the corresponding rate(s) from Rate Services and quiets the utility if the order is in a re-verification state.

Rate Validation Tool

New/Mod	Requested By	Incident No.	DEVOPS No.
Mod			

If you choose not to overwrite the Select rates, the **Verify Rates** button is still available to keep the rates and provide a justification.

» Skipping Correction

The **Additional Title Premiums** tab allows the user to skip overwriting individual charges that do not match when using the **Pull** button.

Check the applicable entry to avoid overwriting the charge(s) in Select.

The screenshot shows the 'Rate Validation Tool' interface. At the top, there are tabs for 'Property View', 'Comparison View', 'Audit View', and 'Log View'. Below these are buttons for 'Verify Rates' and 'Pull ATC Rates'. The 'Last Rates Verified Date And Time' is 10/3/2024 11:51:54 AM. The 'Grand Total (with charges/fees)' is \$5,270.00, with 'Matched' and 'No' counts. Below this is a table with columns: SPS Description, RS Description, SoftPro Premium Amount, RS Premium Amount, Matched, and Skip Correction. The 'Skip Correction' column contains checkboxes, with the second row (CA Document Signing Fee) checked. A red box highlights the 'Skip Correction' column.

SPS Description	RS Description	SoftPro Premium Amount	RS Premium Amount	Matched	Skip Correction
1031 Exchange	Exchange Service Fee (...)	\$250.00	\$250.00	Yes	<input type="checkbox"/>
CA Document Signing Fee	Miscellaneous Services - ...	\$100.00	\$150.00	No	<input checked="" type="checkbox"/>
FullEscrow With Owner	Residential Sale Escrow ...	\$1,446.00	\$1,446.00	Yes	<input type="checkbox"/>
FullEscrow With Owner	Residential Sale Escrow ...	\$1,446.00	\$1,446.00	Yes	<input type="checkbox"/>
IBA Fee	Miscellaneous Services - ...	\$50.00	\$50.00	Yes	<input type="checkbox"/>
Parcel Count	If the property being ns...	\$100.00	\$200.00	No	<input type="checkbox"/>

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PHRASE(S)

New EI Phrase			
New/Mod New Request	Requested By Ticor Title	Incident No.	TFS No. 838899
Code: txpro11 / TAX PRORATIONS - NONE NO PRORATION OF TAXES: The undersigned hereby instruct [Pulls Escrow Office Name] not to prorate real property taxes as a condition of escrow closing. Such prorations, if any, will be handled between the parties hereto outside of escrow.			

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TEXAS

DOCUMENTS

Escrow

<u>Agreement (Indemnity - Gap)</u>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	Elise Kitchens		839360
Updated to reflect the most recent version.			
Affected item(s): SSTXD00278.doc - Agreement (Indemnity - Gap)			

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<u>Medicaid (MERP) Form</u>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	Charter Title		838740
Updated to reflect the most recent version.			
Affected item(s): SSTXD00219.doc - Medicaid (MERP) Form			

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<u>Request to Remove Specific Mineral Exceptions</u>			
New/Mod	Requested By	Incident No.	TFS No.
New Request	CT Houston	INC240394058	838764
New document. Please render to view.			
Affected item(s): SSTXD00319.doc - Request to Remove Specific Mineral Exceptions			

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REPORTS

<i>Workflow Productivity</i>			
New/Mod Change Request	Requested By CPFs Admin	Incident No.	TFS No. 837250
Update for specific TX profiles so EO orders don't show or Canceled files that do not have a completed date for task "D. Typed/Completed."			
Affected item(s): SSCORP5392.rpt - Workflow Productivity			

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WASHINGTON

DOCUMENTS

Escrow

<i>Master Real Estate Excise Tax Affidavits (6)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	WA DOR		839631
Updated to reflect most recent version for sales/transfers after November 1, 2024.			
<p>Affected item(s): WA00001070.doc - Master Real Estate Excise Tax Affidavit (11/01/2024) WA00001074.doc - Master Real Estate Excise Tax Affidavit (11/01/2024) Exempt WA00000305.doc - Master Real Estate Excise Tax Affidavit (11/01/2024) Multi Deed WA00001075.doc - Master Real Estate Excise Tax Affidavit (11/01/2024) Multiple Affidavits WA00001072.doc - Master Real Estate Excise Tax Affidavit (11/01/2024) Multiple Location WA00000307.doc - MH Real Estate Excise Tax Affidavit (11/01/2024)</p>			

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<i>Promissory Note (LPB 28A-05) (2)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	System Admin		840307
Updated to look to the borrower's names on the Security Instrument screen.			
<p>Affected item(s): WA0000043.doc - Promissory Note (LPB 28A-05) WA00000980.doc - Promissory Note (LPB 28A-05) Letter</p>			

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NCS

DOCUMENTS

Escrow

<i>Personal Undertaking (General)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	CT NCS IL		838760
Added language referring to attorney's fees.			
Affected item(s): ILD0523.doc - Personal Undertaking (General)			

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<i>Wire Account Notifications (2)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	CT Portland NCS		838752
Added ACH note.			
Affected item(s): SSCORPD5545.doc - Wire Account Notification (NCS - Commercial) SSCORPD5937.doc - Wire Account Notification with Wire Fraud Alert Notice (NCS - Commercial)			

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INTEGRATIONS

<i>smartview Default Folder Tool</i>			
New/Mod	Requested By	Incident No.	TFS No.
New			
<p>Installation of smartview Default Folder Tool v2.0.2.0.</p> <p>The Default Folder Tool allows mappings to be established between SoftPro documents and reports and the smartview document repository folders.</p>			

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<i>smartview DocSave</i>			
New/Mod	Requested By	Incident No.	TFS No.
New			
<p>This release includes:</p> <ul style="list-style-type: none"> › Application updated to be compatible with the Default Folder application by leveraging the NuGet package which includes a DLL to call its interface. › The Default Folder DLL is now embedded within DocSave and loaded by it's assembly resolver to avoid a mismatch of version numbers for this DLL that might break functionality. › If DocSave is run in an environment that does not have the Default Folder application, the message, endpoint not found is written as an information message versus an error. › If DocSave is run in an environment where the *SmartViewDocSave – DocConversion and/or *SmartViewDocSave – SearchSmartViewOrder SPAdmin groups do not exist, a Warning is written instead of an Error. If a user isn't a member of one or both groups, an information message is written. <p>RESOLVED: Prior to v1.20.0.0 when a user published a document to smartview using the Publish as Word feature, the document was published as a Word document. However, when the user downloaded the published document and attempted to edit it from smartview, the document was not auto-reformatting causing text to overwrite existing text.</p> <p>When publishing individual documents as well as when using the Merge feature, the user can now download the document from smartview and the document auto-formats when editing.</p>			

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REPORTS

<i>New/Updated Lookup Codes – Buyers and Sellers</i>			
New/Mod New Request	Requested By NCS CT - Config Team	Incident No.	TFS No. 837001
New Report for SoCal NCS CT.			
Affected item(s): SSCORP5611.rpt - New/Updated Lookup Codes – Buyers and Sellers			

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SERVICELINK

DOCUMENTS

Escrow

<i>Affidavit (Seller's Closing - Nexpoint)</i>			
New/Mod New Request	Requested By ServiceLink	Incident No.	TFS No. 839698
New document. Please render to view.			
Affected item(s): SLD1107.doc - Affidavit (Seller's Closing - Nexpoint)			

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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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