

SOFTPRO SELECT

November 2024

RELEASE NOTES



Testing Release Date: November 1, 2024
Production Release Date: November 11, 2024



TABLE OF CONTENTS

- ALL STATES/SITES..... 7
- INTEGRATIONS..... 7
 - Rate Validation Tool*..... 7
 - smartview Accounting Forms*..... 7
 - Title Search Export*..... 8
- REPORTS..... 9
 - Commitment/Policy Status - Alternate*..... 9
 - IBA Detail by Bank and Escrow & ProTrust version*..... 9
 - Month by Month Production Summary*..... 9
 - Opened/Closed Orders with Contact Search*..... 9
 - Order Tasks by Order Date*..... 9
 - Order Tasks by Task Dates*..... 10
 - Orders by {Selection}*..... 10
 - Settlement Statements HUD & CDF*..... 10
 - Statistical Report*..... 10
 - Transaction Activity Audit*..... 11
- ARIZONA..... 12
 - DOCUMENTS..... 12
 - Escrow..... 12
 - Endorsement Addendum*..... 12
- CALIFORNIA..... 13
 - DOCUMENTS..... 13
 - Escrow..... 13
 - Affidavit (Transfer Tax - San Francisco)*..... 13
 - Commission Docs (2)*..... 13
 - EI Bulk In Interest of Time (Generic)*..... 13
 - Laguna Hills HOA (Third-Resale-Application) (16)*..... 13
 - Laguna Hills HOA (United-Resale) (22)*..... 14
 - Security Agreement and Promissory Note - Personal Property (consisting of 4 pages)*..... 14
 - Updated HCDs (2)*..... 14
 - INTEGRATIONS..... 15
 - CSS Commercial Import Tool*..... 15
 - Rate Validation Tool*..... 15
- PHRASE(S)..... 17



RELEASE NOTES

NOVEMBER 2024

- EI phrases revised for alignment (NOCAL ONLY)*..... 17
- New EI Phrase (NOCAL ONLY)*..... 17
- REPORTS 18
 - Master Settlement Statement (SubEscrow)*..... 18
- COLORADO..... 19
 - DOCUMENTS..... 19
 - Escrow 19
 - Affidavit (Scrivener's Error)* 19
 - Credit Card Payments - Courtesy Payoff* 19
 - TC Release*..... 19
- FLORIDA..... 20
 - INTEGRATIONS 20
 - smartview Auto Document Generation*..... 20
 - smartview Default Folder Tool* 20
 - smartview DocSave* 20
- HAWAII 21
 - DOCUMENTS..... 21
 - Escrow 21
 - Certificate of Trust*..... 21
- ILLINOIS 22
 - DOCUMENTS..... 22
 - Escrow 22
 - File to File Wire Transfer*..... 22
 - Letter (Listing - Absentee Owner)* 22
 - Statutory Short Form Power of Attorney for Property* 22
 - Title 23
 - Zoning - Completed Improvement Non-Conforming Use and Structure - NEW* 23
 - Zoning - Non-Conforming Structure - NEW*..... 23
 - Zoning - Non-Conforming Structure - Old Version REMOVED*..... 23
 - Zoning - Non-Conforming Use - Old Version REMOVED* 23
- INDIANA..... 24
 - DOCUMENTS..... 24
 - Escrow 24
 - Sewer Charges Request NWI*..... 24
- MARYLAND 25
 - DOCUMENTS..... 25
 - Escrow 25



RELEASE NOTES

NOVEMBER 2024

Private Well Certification 25

MICHIGAN 26

DOCUMENTS..... 26

Title 26

MI Mort 2-06 - Assignment of Rents (Contained in Insured Mortgage) Endorsement 26

NEVADA 27

DOCUMENTS..... 27

Escrow 27

Annexation - Presley Place 27

Buyer to Pay Commission..... 27

Demand Private with Request for Partial Reconveyance 27

Open Order Sheet- FNT..... 27

INTEGRATIONS 28

Rate Validation Tool..... 28

NEW JERSEY 30

INTEGRATIONS 30

Deposit Transfer Tool 30

NEW MEXICO..... 31

DOCUMENTS..... 31

Escrow 31

Affidavit (and Agreement) 31

Letter (Purchase Insured Explanation) 31

INTEGRATIONS 32

smartview Auto Document Generation..... 32

NEW YORK..... 33

INTEGRATIONS 33

Deposit Transfer Tool 33

OHIO 34

DOCUMENTS..... 34

Escrow 34

File Cover - Enterprise 34

Request for Legal Description Review (Ottawa County)..... 34

OKLAHOMA 35

DOCUMENTS..... 35

Escrow 35

Earnest Money Receipt and Disclosure 35



RELEASE NOTES

NOVEMBER 2024

<i>Escrow Agreement (Real Estate Tax)</i>	35
<i>Uniform Abstract Certificate (CCA)</i>	35
OREGON	36
DOCUMENTS.....	36
Escrow	36
<i>Important Notice to New Property Owners</i>	36
<i>Verification of Commission</i>	36
INTEGRATIONS	37
<i>Rate Validation Tool</i>	37
PHRASE(S)	39
<i>New EI Phrase</i>	39
TEXAS	40
DOCUMENTS.....	40
Escrow	40
<i>Agreement (Indemnity - Gap)</i>	40
<i>Medicaid (MERP) Form</i>	40
<i>Request to Remove Specific Mineral Exceptions</i>	40
Title	41
<i>TLTA Form Filing effective 11/1/2024</i>	41
REPORTS	42
<i>Workflow Productivity</i>	42
WASHINGTON.....	43
DOCUMENTS.....	43
Escrow	43
<i>Deed of Trusts (6)</i>	43
<i>Master Real Estate Excise Tax Affidavits (6)</i>	43
<i>Promissory Note (LPB 28A-05) (2)</i>	43
NCS	44
DOCUMENTS.....	44
Escrow	44
<i>Personal Undertaking (General)</i>	44
<i>Wire Account Notifications (2)</i>	44
INTEGRATIONS	45
<i>smartview Default Folder Tool</i>	45
<i>smartview DocSave</i>	45
REPORTS	46
<i>New/Updated Lookup Codes – Buyers and Sellers</i>	46



RELEASE NOTES

NOVEMBER 2024

Transaction Form..... 46
Weekly Summary of Business Worksheet..... 46
SERVICELINK..... 47
DOCUMENTS..... 47
Escrow 47
Affidavit (Seller's Closing - Nexpoint) 47
TECHNICAL NOTES (FOR LOCAL IT/SUPPORT) 48

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.

[Back to Table of Contents](#)

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**.

[Back to Table of Contents](#)

Title Search Export			
New/Mod Mod	Requested By	Incident No.	DEVOPS No.
<p>**ALL STATES EXCEPT SERVICE LINK</p> <p>This release includes:</p> <ul style="list-style-type: none"> > 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. <p>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.</p> <p>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.</p> <p>RESOLVED: Blank Commitment Effective Dates throwing error when publishing.</p> <p>RESOLVED: Blank Title Office Contacts throwing an error when publishing.</p>			

[Back to Table of Contents](#)



REPORTS

<i>Commitment/Policy Status - Alternate</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	Lib Title Admin		839899
<p>1. Updated name so it can be available for other operation.</p> <p>2. Updating Excel options as follows:</p> <ul style="list-style-type: none"> a. Standard = Current output for All First b. Informational = Alternate Columns 			
<p>Affected item(s): SSCORP5600.rpt - Commitment/Policy Status - Alternate</p>			

[Back to Table of Contents](#)

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

[Back to Table of Contents](#)

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

[Back to Table of Contents](#)

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

[Back to Table of Contents](#)

<i>Order Tasks by Order Date</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	Reports Team		831344
<p>Updated Programming Notes.</p>			
<p>Affected item(s): SSCORP5475.rpt - Order Tasks by Order Date</p>			

[Back to Table of Contents](#)



RELEASE NOTES

NOVEMBER 2024

Order Tasks by Task Dates

New/Mod	Requested By	Incident No.	TFS No.
Change Request	Reports Team		831346
Updated Programming Notes.			
Affected item(s): SSCORP5474.rpt - Order Tasks by Task Dates			

[Back to Table of Contents](#)

Orders by {Selection}

New/Mod	Requested By	Incident No.	TFS No.
Change Request	8/27/24		839362
<ol style="list-style-type: none"> Added additional options to the "Report Type" parameter. Added "Disbursement Date" column to the Excel-All version. 			
Affected item(s): SSCORP5082.rpt - Orders by {Selection}			

[Back to Table of Contents](#)

Settlement Statements HUD & CDF

New/Mod	Requested By	Incident No.	TFS No.
Change Request	LT SoCal, PacNW IT		837172
<ol style="list-style-type: none"> Updated to show QI as needed, in header or footer, with or without signatures. OREGON only: updated Commissions verbiage for Estimated (Free quote) Updated Bill Code rev share combinations for CA NCS. <p>**PLEASE NOTE: For older files with QIs please reselect an option.</p>			
Affected item(s): SSCORPD1823.rpt - Individual Settlement Statement, Legal SSCORPD1824.rpt - Individual Settlement Statement, Letter SSCORPD5460.rpt - Individual Settlement Statement, Legal (CDF) SSCORPD5461.rpt - Individual Settlement Statement, Letter (CDF) SSCORPD5454.spdoc - Settlement Statements			

[Back to Table of Contents](#)

Statistical Report

New/Mod	Requested By	Incident No.	TFS No.
Change Request	PacNW IT		839254
<ol style="list-style-type: none"> Added free text "Policy Description Contains" field. This logic will look to the Policy "Description" field, in the Title Insurance Premiums screen. For WTE - OR show column for ESC bill code at the end of the report. 			
Affected item(s): SSCORP5272.rpt - Statistical Report			

[Back to Table of Contents](#)



RELEASE NOTES

NOVEMBER 2024

<i>Transaction Activity Audit</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	LT SoCal OAC		838240
Added a "Brief" Excel version.			
Affected item(s): SSCORP5545.rpt - Transaction Activity Audit			

[Back to Table of Contents](#)



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			

[Back to Table of Contents](#)



CALIFORNIA

DOCUMENTS

Escrow

<i>Affidavit (Transfer Tax - San Francisco)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	CT NoCal	INC240413758	840327
Updated to reflect most recent version.			
Affected item(s): SCA0002913.doc - Affidavit (Transfer Tax - San Francisco)			

[Back to Table of Contents](#)

<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			

[Back to Table of Contents](#)

<i>EI Bulk In Interest of Time (Generic)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	CT SoCal Jeanette Haines		840982
Document updated to match for all SoCal Operations. Please render in full to review.			
Affected item(s): SCA0002823.doc - EI Bulk In Interest of Time (Generic)			

[Back to Table of Contents](#)

<i>Laguna Hills HOA (Third-Resale-Application) (16)</i>			
New/Mod	Requested By	Incident No.	TFS No.
New Request	FNT Digital Officer		840789
New documents. Please render to view.			
Affected item(s): SCA0003212.doc - First and Final Inspection Report Request SCA0003213.doc - Resale Notification SCA0003214.doc - Notice of Closing SCA0003215.doc - Escrow Closing Notification and Transmittal Report SCA0003216.doc - Responsibility Agreement for Nonstandard Landscaping SCA0003217.doc - Owner-Membership Application SCA0003218.doc - Third Mutual Members Who Hold More Than One Membership SCA0003219.doc - Trust Facilities Fee SCA0003220.doc - Promissory Note SCA0003221.doc - Financial Statement and Credit Information SCA0003222.doc - Financial Assets SCA0003223.doc - Exhibit A SCA0003224.doc - Enjoying Your Life in Third Laguna Hills Mutual SCA0003225.doc - Last Minute Reminders SCA0003226.doc - Important Information for Third Laguna Hills Mutual SCA0003227.doc - Application for Co-Occupancy Permit			

[Back to Table of Contents](#)



RELEASE NOTES

NOVEMBER 2024

<i>Laguna Hills HOA (United-Resale) (22)</i>			
New/Mod	Requested By	Incident No.	TFS No.
New Request	FNT Digital Officer		840790
New documents. Please render to view.			
<p>Affected item(s): SCA0003228.doc - First and Final Inspection SCA0003229.doc - Resale Notification SCA0003230.doc - Escrow Closing Information SCA0003231.doc - Escrow Closing Notification and Remittance Report SCA0003232.doc - Responsibility Agreement for Nonstandard Landscaping SCA0003233.doc - Responsibility Agreement for Alterations SCA0003234.doc - Memorandum of Termination of Occupancy Agreement SCA0003235.doc - Shareholders Membership Application SCA0003236.doc - United Mutual Membership and Occupancy Requirements SCA0003237.doc - Golden Rain Foundation Trust Facilities Fees SCA0003238.doc - Promissory Note SCA0003239.doc - Financial Statement and Credit Information SCA0003240.doc - Financial Assets SCA0003241.doc - Exhibit A SCA0003242.doc - Residency Restrictions SCA0003243.doc - Instructions for Trustee Shareholder Membership SCA0003244.doc - Occupancy Agreement SCA0003245.doc - Addendum to Occupancy Agreement – Trustee Membership SCA0003246.doc - Stock Assignment Separate from Certificate SCA0003247.doc - Interim Dual Membership Agreement SCA0003248.doc - Memorandum of Occupancy Agreement SCA0003249.doc - Application for Co-Occupancy Permit</p>			

[Back to Table of Contents](#)

<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.			
<p>Affected item(s): SCA0000274.doc - Security Agreement and Promissory Note - Personal Property (consisting of 4 pages) nka Security Agreement and Promissory Note - Personal Property</p>			

[Back to Table of Contents](#)

<i>Updated HCDs (2)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	CA Dept. of Housing and Community Development		840080
Updated to reflect the most recent versions provided on the California Department of Housing and Community Development's website.			
<p>Affected item(s): SCA0000219.doc - MH Statement of Purchase Price Comm (HCD 479.7) SCA0002383.doc - MH Application for Replacement Insignia (HCD 416)</p>			

[Back to Table of Contents](#)

INTEGRATIONS

<i>CSS Commercial Import Tool</i>			
New/Mod	Requested By	Incident No.	TFS No.
New			
<p>Installation of CSS Commercial Import v1.18.0.0.</p> <p>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.</p>			

[Back to Table of Contents](#)

<i>Rate Validation Tool</i>			
New/Mod	Requested By	Incident No.	DEVOPS No.
Mod			
<p>This release includes:</p> <ul style="list-style-type: none"> › Upgrade to Feature 5.0 <ul style="list-style-type: none"> NOTE: This feature requires configuration. Reach out to FNFRatesTeam@softprocorp.com for a demo/configuration. <p>The ability to compare the escrow/ancillary supported charges from Rate Services to the charges being collected in the SoftPro order.</p> <ul style="list-style-type: none"> » 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.  <ul style="list-style-type: none"> » If escrow/ancillary supported charges, <ul style="list-style-type: none"> ○ 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.
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- **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.



[Back to Table of Contents](#)



RELEASE NOTES

NOVEMBER 2024

PHRASE(S)

<i>El phrases revised for alignment (NOCAL ONLY)</i>			
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.			

[Back to Table of Contents](#)

<i>New El Phrase (NOCAL ONLY)</i>			
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 [Pulls Assumption and Modification date recorded] as [Pulls Assumption and Modification place recorded information] Official Records, County of [Pulls Property County]. Said <i>Deed of Trust</i> was executed by [Pulls Mortgagor], <u>as Trustor</u> , in favor of [Pulls Mortgagee], <u>as 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 (Is payment being collected from Seller thru escrow?)] If Yes: [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 to [PROMPT (Enter Date for Proration)] and [PROMPT (Debit buyer/credit seller for interest?)]. If true will pull in 'debit Buyer/credit Seller' else 'credit Buyer/debit Seller' for same. 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. <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.			

[Back to Table of Contents](#)



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			

[Back to Table of Contents](#)



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)			

[Back to Table of Contents](#)

<i>Credit Card Payments - Courtesy Payoff</i>			
New/Mod Change Request	Requested By Settlement Support	Incident No. INC240421927	TFS No. 841357
Updated prompt "Enter the fee is more than 5 accounts to payoff" to "Enter the fee is more than 4 accounts to payoff".			
Affected item(s): COD1263.doc - Credit Card Payments - Courtesy Payoff			

[Back to Table of Contents](#)

<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			

[Back to Table of Contents](#)

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>			

[Back to Table of Contents](#)

<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>			

[Back to Table of Contents](#)

<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>			

[Back to Table of Contents](#)



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			

[Back to Table of Contents](#)



ILLINOIS

DOCUMENTS

Escrow

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

[Back to Table of Contents](#)

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

[Back to Table of Contents](#)

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

[Back to Table of Contents](#)



Title

Zoning - Completed Improvement Non-Conforming Use and Structure - NEW
Zoning - Non-Conforming Structure - NEW
Zoning - Non-Conforming Structure - Old Version REMOVED
Zoning - Non-Conforming Use - Old Version REMOVED

New/Mod New Request	Requested By IL State Counsel	Incident No.	TFS No. 841054
-------------------------------	---	---------------------	--------------------------

Two new endorsements "Zoning - Completed Improvement Non-Conforming Use and Structure" and "Zoning - Non-Conforming Structure" are now available for issuance on properties in the state of Illinois.

Note: At the direction of State counsel, the previous versions "Zoning - Non-Conforming Structure" and "Zoning - Non-Conforming Use" are removed.

[Back to Table of Contents](#)



INDIANA

DOCUMENTS

[Escrow](#)

Sewer Charges Request NWI			
New/Mod	Requested By	Incident No.	TFS No.
New Request	FT NWI		840696
New document. Please render to view.			
Affected item(s): IND1373.doc - Sewer Charges Request NWI			

[Back to Table of Contents](#)



MARYLAND

DOCUMENTS

[Escrow](#)

<i>Private Well Certification</i>			
New/Mod New Request	Requested By NCS Maryland and ServiceLink	Incident No. INC240396468	TFS No. 840311
New document. Please render to view.			
<u>Affected item(s):</u> MDD1151.doc - Private Well Certification			

[Back to Table of Contents](#)



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.			

[Back to Table of Contents](#)



NEVADA

DOCUMENTS

Escrow

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

[Back to Table of Contents](#)

<i>Buyer to Pay Commission</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	CT NV	INC240400773	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)			

[Back to Table of Contents](#)

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

[Back to Table of Contents](#)

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

[Back to Table of Contents](#)

Rate Validation Tool

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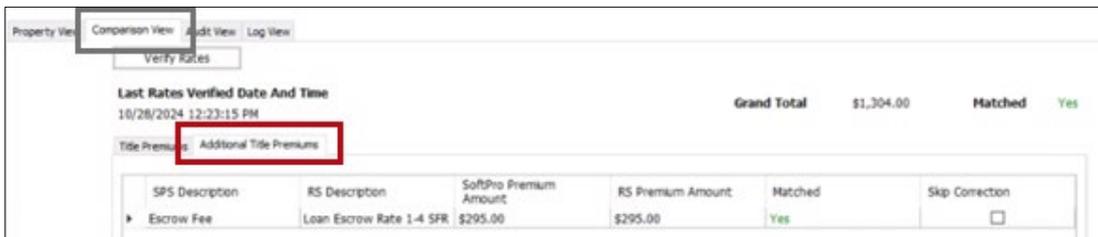
This release includes:

- › 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. A red box highlights this 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"/>

[Back to Table of Contents](#)



INTEGRATIONS

Deposit Transfer Tool

New/Mod New	Requested By	Incident No.	TFS No.
<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>			

[Back to Table of Contents](#)



NEW MEXICO

DOCUMENTS

Escrow

Affidavit (and Agreement)

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)			

[Back to Table of Contents](#)

Letter (Purchase Insured Explanation)

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)			

[Back to Table of Contents](#)



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>			

[Back to Table of Contents](#)



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>			

[Back to Table of Contents](#)



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			

[Back to Table of Contents](#)

<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)			

[Back to Table of Contents](#)

OKLAHOMA

DOCUMENTS

Escrow

<u>Earnest Money Receipt and Disclosure</u>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	CT OK		841360
Added additional disclosure information.			
Affected item(s): OKD1034.doc - Earnest Money Receipt and Disclosure			

[Back to Table of Contents](#)

<u>Escrow Agreement (Real Estate Tax)</u>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	FirsTitle	INC240424599	841419
Added the seller's forwarding address.			
Affected item(s): OKD1137.doc - Escrow Agreement (Real Estate Tax)			

[Back to Table of Contents](#)

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

[Back to Table of Contents](#)



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			

[Back to Table of Contents](#)

<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			

[Back to Table of Contents](#)

INTEGRATIONS

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.



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- **Pull Title & ATC Rates** - Title and Escrow/ancillary charges do not match
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- › 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 for 'SPS Description', 'RS Description', 'SoftPro Premium Amount', 'RS Premium Amount', and 'Matched'. A 'Skip Correction' column is highlighted with a red box, containing checkboxes for each row. The table data is as follows:

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"/>

[Back to Table of Contents](#)



RELEASE NOTES

NOVEMBER 2024

PHRASE(S)

<i>New EI Phrase</i>			
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.			

[Back to Table of Contents](#)



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)			

[Back to Table of Contents](#)

<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			

[Back to Table of Contents](#)

<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			

[Back to Table of Contents](#)



Title

<i>TLTA Form Filing effective 11/1/2024</i>			
New/Mod New Request	Requested By TLTA	Incident No.	TFS No. 837098
TLTA form filings effective 11/1/2024.			

[Back to Table of Contents](#)



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			

[Back to Table of Contents](#)



WASHINGTON

DOCUMENTS

Escrow

<u>Deed of Trusts (6)</u>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	System Admin		840313
Revised to pull signatures from the correct field.			
Affected item(s): WA0000021.doc - Deed of Trust (LPB 22) WA00000930.doc - Deed of Trust (LPB 22) Letter WA0000022.doc - Deed of Trust-Short Form (LPB 20) WA00000932.doc - Deed of Trust-Short Form (LPB 20) Letter WA0000069.doc - Deed of Trust with Due on Sale and Due Date (LPB 22A) WA00000931.doc - Deed of Trust with Due on Sale and Due Date (LPB 22A) Letter			

[Back to Table of Contents](#)

<u>Master Real Estate Excise Tax Affidavits (6)</u>			
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.			
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)			

[Back to Table of Contents](#)

<u>Promissory Note (LPB 28A-05) (2)</u>			
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.			
Affected item(s): WA0000043.doc - Promissory Note (LPB 28A-05) WA00000980.doc - Promissory Note (LPB 28A-05) Letter			

[Back to Table of Contents](#)



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)			

[Back to Table of Contents](#)

<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)			

[Back to Table of Contents](#)

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>			

[Back to Table of Contents](#)

<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>			

[Back to Table of Contents](#)



REPORTS

New/Updated Lookup Codes – Buyers and Sellers

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

[Back to Table of Contents](#)

Transaction Form

New/Mod	Requested By	Incident No.	TFS No.
Change Request	CLTI NoCall Escrow Admin		839440
Included NCS NoCal in the logic to show the current user's signature for all receipt types.			
Affected item(s): SSCORP5002.rpt - Transaction Form			

[Back to Table of Contents](#)

Weekly Summary of Business Worksheet

New/Mod	Requested By	Incident No.	TFS No.
New Request	Implementation Team		839437
Updated to omit files with "Accommodation" as the "Additional Description" for NCS FNT CA.			
Affected item(s): SSCORP5247.rpt - Weekly Summary of Business Worksheet			

[Back to Table of Contents](#)



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)			

[Back to Table of Contents](#)



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.

[Back to Table of Contents](#)