

SOFTPRO SELECT

December 2024

RELEASE NOTES



Testing Release Date: November 22, 2024
Production Release Date: December 9, 2024

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ALL STATES/SITES

DOCUMENTS

Escrow

<i>UCC document title updates (6)</i>			
New/Mod Change Request	Requested By CT Orange County	Incident No.	TFS No. 842214
Updating the document title in the tree to make it easier to identify each form.			
Affected item(s): SSCORPD0300.doc - UCC 1 Form SSCORPD0301.doc - UCC 1 Addendum SSCORPD0302.doc - UCC 1 Additional Party SSCORPD0303.doc - UCC 3 Form SSCORPD0304.doc - UCC 3 Addendum SSCORPD0305.doc - UCC 3 Additional Party			

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Title

ALTA 3.3 - Zoning - Completed Improvement - Legal Non-Conforming Use 2024
ALTA 10.2 - Collateral Assignment
ALTA 10.3 - Collateral Assignment and Date Down
ALTA Short Form Expanded Coverage Residential Loan Policy-Assessments Priority 2021
ALTA Short Form Expanded Coverage Residential Loan Policy-Current Assessments 2021

New/Mod	Requested By	Incident No.	TFS No.
Change Request	Form Filing		844569

As per Form Filing, two new endorsements, "ALTA 10.2 - Collateral Assignment" and "ALTA 10.3 - Collateral Assignment and Date Down" will soon be available.

An updated/Revised version of the "ALTA 3.3 - Zoning - Completed Improvement - Legal Non-Conforming Use 2024" will also soon be available, as per Form Filing.

In addition, the 2021 Short Form Expanded policies have been updated with revised language for the item 6 preamble, as well as revised language at the top of Schedule B.

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INTEGRATIONS

Smartview Default Folder Tool			
New/Mod	Requested By	Incident No.	TFS No.
New			
<p>** ALL SITES EXCEPT FL / NCS</p> <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. This is a permission based tool.</p> <p>Related document: Default Folder Tool – Creating the Smartview Folder Mapping</p>			

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Smartview DocSave			
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 on the Documents tab to merge multiple documents into one, the user can now download the document from smartview and the document auto-formats when editing.</p>			

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REPORTS

<i>Group Property Statement (CSS) (Master, Buyer, Seller)</i>			
New/Mod	Requested By	Incident No.	TFS No.
New Request	FNT CA		841235
<p>New version of the CSS Property Statements allowing you to pick which properties are included. These versions have the same options and format as the existing property statements. An additional prompt will be shown asking which properties to include instead of a single property. Only shown in the documents tree (when added) if the order has multiple properties.</p> <p>Affected item(s): SSCORPD3011.spdoc - Group Property Statement (CSS)</p>			

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<i>Opened/Closed Orders with Contact Search</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	CO ADM		841252
<p>Updated as follows:</p> <ol style="list-style-type: none"> Created a "Expanded - Buyers - Sellers Contact Info" Excel version. It will show contact information for joint individuals. When a Buyer or Seller are Organizations, the Corporate Officer's contact Information will pull. <p>Affected item(s): SSCORP5297.rpt - Opened/Closed Orders with Contact Search</p>			

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<i>Settlement Statement (HTML)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Fix	Reports		842579
<p>Fixed error generated when "Print consumers signatures only" option is checked."</p> <p>Affected item(s): SSCORPD5454.spdoc</p>			

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<i>Transaction Activity</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	PacNW IT		841384
<p>Added option "Receipt + Inc Wire (3rd party)" which excludes lender's funds.</p> <p>Affected item(s): SSCORP0018.rpt - Transaction Activity</p>			

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<i>Weekly Summary of Business Worksheet</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	Reports Team		841353
<p>Updated weeks for 2025.</p> <p>Affected item(s): SSCORP5247.rpt - Weekly Summary of Business Worksheet</p>			

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<i>Workflow Productivity</i>			
New/Mod Change Request	Requested By CPFs Admin	Incident No.	TFS No. 843354
Added Commercial/Residential field to Excel export.			
Affected item(s): SSCORP5392.rpt - Workflow Productivity			

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CALIFORNIA

DOCUMENTS

Escrow

<u>2025 593s</u>			
New/Mod Change Request	Requested By CA	Incident No.	TFS No. 842903
In addition to the 2024 593 forms, the 2025 593 forms are now available as well.			
Affected item(s): SCA0002523.doc - 593 Form (2025) - Tax Statement SCA0002523.doc - 593 Form (2025) - Tax Statement (Refi) SCA0002529.doc - 593 Form Instructions (2025) - Tax Statement SCA0002370.doc - 593-V Form (2025) - Payment Voucher			

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<u>CT Orange doc change requests</u>			
New/Mod Change Request	Requested By CT SoCal Jeanette Haines	Incident No.	TFS No. 842126
Document updated to match for all SoCal Operations. Please render in full to review.			
Affected item(s): SCA0002630.doc - EI General Provisions - GP (Stock-Membership Sale) SCA0003251.doc - Vehicle Payoff Letter SCA0003252.doc - Third Party Return Money to Depositor SCA0003253.doc - FFE Fixed Asset List SCA0003254.doc - Bulk - Seller Closing Letter SCA0003255.doc - Bulk - Buyer Closing Letter SCA0003256.doc - MH - Buyer Closing Letter SCA0003257.doc - MH - Seller Closing Letter SCA0003258.doc - EI GP - Stock SCA0003259.doc - EI Closing Instructions (Dealership) (EIS) SCA0003260.doc - EI Wrap Instructions (SoCal) (EIS)			

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<u>E&Os (3)</u>			
New/Mod Change Request	Requested By CT/FT/TT SoCal	Incident No.	TFS No. 842636
Updated to most recently provided versions.			
Affected item(s): SCA0002555.doc - Corporate E&O Insurance - Chicago SCA0002572.doc - Corporate E&O Insurance - Fidelity SCA0003020.doc - Corporate E&O Insurance - Ticor			

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<i>Indemnity Forms (18)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	Susie Wrede	INC240441040	843675
<p>Added "The undersigned covenants and agrees to pay the Company all amounts so expended on demand, including, but not limited to, attorneys fees incurred with enforcing this agreement."</p> <p>Affected item(s): AZD1247.doc - Unsecured Indemnity Agreement COD1242.doc - FNF Unsecured Indemnity Agreement HID1242.doc - Unsecured Indemnity Agreement IND1338.doc - Personal Undertaking - Mechanic's Lien Language IND1370.doc - Affidavit (Indemnity) MID1299.doc - Indemnity Agreement (Construction Undertaking) MID1300.doc - Indemnity Agreement (Unsecured Indemnification Form) MID1360.doc - Residential Construction Indemnification MOD1162.doc - Agreement (Indemnity - General) NHD1018.doc - Construction Indemnity NOVD1158.doc - Indemnity Agreement (Mechanic's Lien) NVD1021.doc - Unsecured Indemnity Agreement OKD1328.doc - Agreement (Indemnity - General) SCA0002004.doc - Indemnity Agreement - Mechanic's Lien SCA0002824.doc - Contractor's Indemnity Subordination and Hold Harmless SCA0002888.doc - Unsecured Indemnity Agreement VTD0013.doc - Construction Indemnity WID0285.doc - Unsecured Indemnity Agreement</p>			

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<i>Separate Commission – Listing-Selling</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	FNT SoCal Newport Beach	INC240422317	842894
<p>Added the license number for the broker/agent.</p> <p>Affected item(s): SCA0002556.doc - Separate Commission – Listing-Selling</p>			

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<i>Vesting Explanation</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	NoCal	INC240437672	843671
<p>Added Domestic Partners column.</p> <p>Affected item(s): SCA0002754.doc - Vesting Explanation</p>			

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Escrow/Title

<i>Funds Due (Buyer-Seller)</i>			
New/Mod Change Request	Requested By LT SoCal	Incident No.	TFS No. 843835
Document now pulls amount due on Statement. Please render document in full to see changes.			
Affected item(s): SCA0002408.doc - Funds Due (Buyer-Seller)			

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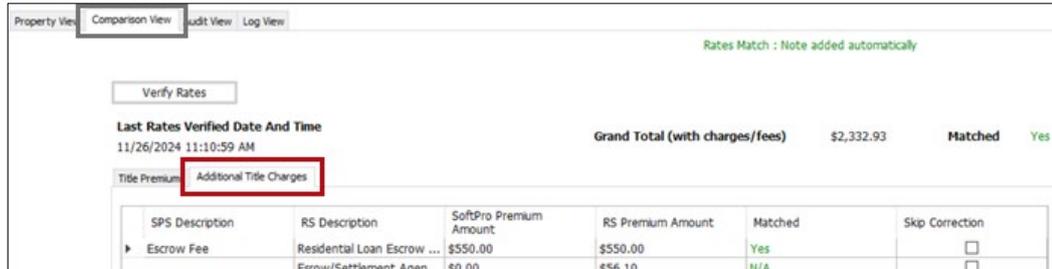
INTEGRATIONS

[Rate Validation Tool](#)

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

This release includes:

- > The name change of the **Additional Title Premiums** tab to **Additional Title Charges**.



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PHRASE(S)

Revised tax04 for NoCal

New/Mod Change Request	Requested By Santa Clara	Incident No. INC240458559	TFS No. 844694
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Prompt added for Decedent's Name:

Taxes - Escaped / Code: tax04

TAXES - ESCAPED: It is understood by the undersigned parties that any Escaped Taxes due by reason of the death of **[Pulls Preliminary Title Decedent Name if filled in; otherwise will Prompt]** should be transferred by the **[Pulls Property County]** County Tax Assessor's Office to the unsecured tax rolls upon the transfer of title and it should be the Seller's responsibility to pay said taxes. It is further understood that the Escaped Taxes due by reason of the death of **[Pulls Preliminary Title Decedent Name if filled in; otherwise will pull in Prompt answer from above]** shall be paid from the Seller's proceeds if an amount becomes available before the close of escrow without further instructions. **[Pulls Escrow Office Name]** is hereby held harmless from any liability in the event the Escaped Taxes are not transferred to the unsecured rolls.

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REPORTS

Data Download

New/Mod Change Request	Requested By LT SoCal Admin	Incident No.	TFS No. 841195
Updated for LT SoCal to include 'Escrow Rep' column.			
Affected item(s): SSCORP5577.rpt - Data Download			

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EPU Reports

New/Mod Change Request	Requested By NoCal	Incident No.	TFS No. 841090
Updated tasks for NoCal.			
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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Invoice Aging

New/Mod Change Request	Requested By Lenders Direct Admin	Incident No.	TFS No. 844049
Updated for Lenders Direct to show all invoices, regardless of posted ledgers.			
Affected item(s): SSCORP5036.rpt - Invoice Aging			

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COLORADO

INTEGRATIONS

Smartview Accounting Forms

New/Mod Mod	Requested By	Incident No.	TFS No.
This release includes: RESOLVED: Select closing when a user, not assigned to an order's owning profile, opened and closed the related Ledger in ProTrust.			

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Value Check Property Search

New/Mod Mod	Requested By	Incident No.	TFS No.
This release includes: <ul style="list-style-type: none">• Columns in the Search Results grid are now expandable.• Security vulnerability addressed.			

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REPORTS

EPU Reports

New/Mod	Requested By	Incident No.	TFS No.
Change Request	CO EPU Admin		841090
Updated tasks.			
<u>Affected item(s):</u> 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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FLORIDA

DOCUMENTS

Title

<i>Co-insurance language update for First Title</i>			
New/Mod Change Request	Requested By First Title of GA	Incident No.	TFS No. 844263
For First Title profiles only, updated the Coverage Amount language when using the ALTA 23.1 Endorsement.			
Affected item(s): FLD1376.doc - ALTA Loan Policy 2021 (FL) FLD1377.doc - ALTA Owner's Policy 2021 (FL)			

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INTEGRATIONS

Smartview Accounting Forms

New/Mod Mod	Requested By	Incident No.	TFS No.
<p>This release includes:</p> <p>RESOLVED: Issue where the user was presented with a message that forms were being published and sometimes received error messages that form could not be published.</p> <p>This occurs when closing a revenue ledger after using the Disburse Transferred Funds option to post the revenue disbursement. And only when one or more of the orders where the Ledger Transfer (-) originated from had an Order Status = Closed, Completed, or Canceled. The Aspose v9.2.1 has been embedded.</p>			

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Smartview Auto Document Generation

New/Mod Mod	Requested By	Incident No.	TFS No.
<p>This release includes:</p> <ul style="list-style-type: none"> - AutoDocGen calls into the Default Folder application's interface to fetch the expected default Smartview and Order Attachment folder for the Document name and Profile path combination and publish the document in question to the designated folders. <p>If the Order Attachment folder path specified in Default Folder application does not exist in the order, AutoDocGen resends the request to instead write to the main Attachment folder.</p> <p>If the Smartview folder path specified in Default Folder application does not exist, smartview writes the request to the root folder.</p> <p>If the Default Folder application is not installed, AutoDocGen writes an informational message to the logs and publishes documents to the main Attachment folder or root folder in Smartview.</p> <ul style="list-style-type: none"> - Enhancements for configuration setting validations and tooltips. 			

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ILLINOIS

DOCUMENTS

Escrow

<i>Attorney Preferences (2)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	CT Metro	INC240430824	842868
Added Attorney Preferences.			
Affected item(s): ILD0342.doc - Escrow Folder Cover Sheet ILD0615.doc - Escrow Cover Sheet (Commercial)			

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<i>Closing Confirmation (IL)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	Liberty Title		843669
Updated Katris Law Group address.			
Affected item(s): LIBD1124.doc - Closing Confirmation (IL)			

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Title

<i>CLTA 150 - Solar Endorsement 2022</i>			
New/Mod New Request	Requested By IL State Counsel	Incident No.	TFS No. 842088
The CLTA 150 - Solar Endorsement is now available for issuance on properties in the state of Illinois.			

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<i>Maximum Actual Loss Endorsement</i>			
New/Mod New Request	Requested By St. Louis Title	Incident No.	TFS No. 843724
A new "Maximum Actual Loss Endorsement" is now available for issuance on properties in the state of Illinois, as per direction of IL State Counsel.			

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Attorney Contact Screen

New/Mod Mod	Requested By Chris Reyes	Incident No.	TFS No.
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The following custom fields have been added to the **Attorney** Contact screen:

- > **Attorney Customer Type**
- > **Customer Preference**

This change is visible when the **My Screens > IL - NCS** is selected.

The screenshot shows the 'Attorney' contact form. At the top right, there are links for 'Order Stat' and 'Buyer:'. The form is divided into several sections:

- Attorney Section:** Contains fields for 'Lookup code', 'Name', 'Short name', 'Payee name', 'Address', 'City/State/Zip', 'County', 'Phone', 'Fax', 'Email address', 'Fee transfer ledger', 'Anticipate funds as', 'Anticipate disbursement as', 'Represents', and 'Divert fees to'. There are also checkboxes for 'Foreign', 'Include on revenue reports', 'Marketing source', and 'Commitment recipient'. Marketing representatives are listed as 'Marketing rep. 1', 'Marketing rep. 2', and 'Marketing rep. 3'. Other fields include 'Reference #', 'Tax ID/SSN', 'License #', 'ALTA ID', 'NMLS #', and 'CDF payee type'. A 'Save And Add New' button is present.
- Highlighted Fields:** A red box highlights two new fields: 'Attorney Customer Type' (a text input field) and 'Customer Preferences' (a multi-line text area).
- People Section:** A table at the bottom with columns for 'First Name', 'Middle Name', 'Last Name', 'Title', 'Email', and 'Phone'.

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INDIANA

DOCUMENTS

Title

ALTA 41-06 - Water(series) Endorsements
CLTA 150-06Solar Endorsement
SE 525 - Disbursement Endorsement
SE 526 - Disbursement Endorsement With Acknowledgement
SE 527- Modification Special Endorsement
SE 313 -Mortgage Add-On - WITHDRAWN

New/Mod	Requested By	Incident No.	TFS No.
New Request	IN Form Filing		843247

As per Indiana Form Filing effective December 11, 2024, the following endorsements are now available for issuance on properties in the state of Indiana:

- ALTA 41-06 - Water- Buildings Endorsement
- ALTA 41.1-06 - Water- Improvements Endorsement
- ALTA 41.2-06 - Water- Described Improvements Endorsement
- ALTA 41.3-06 - Water- Land Under Development Endorsement
- CLTA 150-06Solar Endorsement
- SE 525 - Disbursement Endorsement
- SE 526 - Disbursement Endorsement With Acknowledgement
- SE 527- Modification Special Endorsement

Note: The SE 313 -Mortgage Add-On endorsement is now Withdrawn and has been removed from availability. (The SE 312 - Mechanic's Lien endorsement was also Withdrawn and has not been available for selection.)

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Express Order Entry Screen

New/Mod Mod	Requested By Amy Schumann	Incident No.	TFS No.
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The **Notes** custom field has been added to the **Express Order Entry** screen.
This change is visible when the **My Screens > IN All Screens** is selected.

Express Order Entry

Rush order

Transaction type

Purchase

Refinance

Equity

Other

Commercial

Construction

Cash sale

Out of county

Order type:

Product type:

Policy type:

Additional Description:

Order / Escrow Status

Date/time escrow opened: Opened by:

Escrow status:

Date/time escrow closed: Closed by:

Escrow lock status:

Comments:

Escrow office: Escrow officer/Closer:

Pre-closer/Escrow assistant:

Title office: Title officer/Examiner:

Settlement date/time: Estimated date/time

Due date/time:

Related order(s):

Project name:

Notes:

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MARYLAND

DOCUMENTS

Escrow

<i>Affidavit (Baltimore City)</i>			
New/Mod New Request	Requested By Liberty Title	Incident No. INC240427743	TFS No. 842854
New document. Please render to view.			
Affected item(s): MDD1152.doc - Affidavit (Baltimore City)			

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<i>Wire Information</i>			
New/Mod Change Request	Requested By Liberty Title	Incident No. INC240431272	TFS No. 842863
Updated to remove reference to cashier's check.			
Affected item(s): SSCORPD1807.doc - Wire Information SSCORPD5330.doc - Wire Information (International)			

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MINNESOTA

DOCUMENTS

Title

<i>SE 516 - Minnesota General Endorsement (2024)</i>			
New/Mod New Request	Requested By MN Commercial Partners	Incident No.	TFS No. 843884
A updated/Revised version of the "SE 516 - Minnesota General Endorsement (2024)" is now available for issuance on properties in the state of Minnesota, as per Form Filing.			

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MISSOURI

DOCUMENTS

Escrow

<i>Certification of Trust - Generic</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	St. Louis Title	INC240424307	842857
Added acknowledgment.			
Affected item(s): MOD1247.doc - Certification of Trust - Generic			

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Title

<i>ALTA Commitment 2021 with Privacy Notice (MT)</i>			
New/Mod New Request	Requested By MT - FT Hamilton	Incident No.	TFS No. 844222
A new version of the 2021 Commitment that includes the Privacy Notice is now available to add to document trees for the state of Montana.			
Affected item(s): MTD0246.doc - ALTA Commitment 2021 with Privacy Notice (MT)			

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NEBRASKA

DOCUMENTS

Escrow

<i>Nebraska Real Estate Transfer Statement</i>			
New/Mod Change Request	Requested By CT Kansas City	Incident No. INC240446735	TFS No. 843799
Updated to reflect most recent version with Rev. date 10-2020.			
Affected item(s): NED1003.doc - Nebraska Real Estate Transfer Statement			

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NEVADA

DOCUMENTS

Escrow

<i>EI - Sale (EIS) (Reno)</i>			
New/Mod Change Request	Requested By NV	Incident No. INC240436327	TFS No. 842861
Added Crystal Bay to function same as Incline Village.			
Affected item(s): NVD1429.doc - EI - Sale (EIS) (Reno)			

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<i>LLC Consent Form</i>			
New/Mod Change Request	Requested By NV	Incident No.	TFS No. 842859
Added notary.			
Affected item(s): NVD1066.doc - LLC Consent Form			

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INTEGRATIONS

[Rate Validation Tool](#)

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

This release includes:

- > The name change of the **Additional Title Premiums** tab to **Additional Title Charges**.



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MY SCREENS

Order Entry - Title Screen

New/Mod Mod	Requested By Adam Bailey	Incident No.	TFS No.
-----------------------	------------------------------------	---------------------	----------------

The **Rush order** check box has been added to the **Order Entry - Title** screen.
This change is visible when the **My Screens > Reno Title Screens** is selected.

The screenshot shows the 'Order Entry - Title' screen with several options. The 'Rush order' checkbox is circled in red. Other visible options include 'Exclude from NextAce', 'Auto-publish to ClosingsLIVE', and a 'Transaction type' section with radio buttons for Purchase, Refinance (selected), Equity, and Other. There are also checkboxes for Commercial, Construction, Cash sale, and Out of county, along with dropdown menus for Order type, Product type, and Policy type.

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Prelim/Commitment Screen

New/Mod Mod	Requested By Adam Bailey	Incident No.	TFS No.
-----------------------	------------------------------------	---------------------	----------------

The following fields have been added to the **Prelim/Commitment** screen:

- > **Effective Date**
- > **Effective Time**

This change is visible when the **My Screens > NV Title Screens** is selected.

The screenshot shows the 'Prelim/Commitment' screen. Two dropdown menus, 'Effective Date' and 'Effective Time', both set to '(None)', are circled in red. Below them is a section titled 'Commitments/Prelims (1)' with a 'Commitment/Prelim number:' field.

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NEW JERSEY

REPORTS

<i>Invoices</i>			
New/Mod Change Request	Requested By NJ FNJO Admin	Incident No.	TFS No. 841775
Updated as follows: 1. Defaulted 'Remit to' address for NJ FNJO to the Mercerville Address			
<u>Affected item(s):</u> SSCORPD5021.spdoc - Invoice SSCORPD3003.spdoc - Consolidated Invoice			

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INTEGRATIONS

Smartview Auto Document Generation

New/Mod Mod	Requested By	Incident No.	TFS No.
<p>This release includes:</p> <ul style="list-style-type: none">- AutoDocGen calls into the Default Folder application's interface to fetch the expected default Smartview and Order Attachment folder for the Document name and Profile path combination and publish the document in question to the designated folders. If the Order Attachment folder path specified in Default Folder application does not exist in the order, AutoDocGen resends the request to instead write to the main Attachment folder. If the Smartview folder path specified in Default Folder application does not exist, smartview writes the request to the root folder. If the Default Folder application is not installed, AutoDocGen writes an informational message to the logs and publishes documents to the main Attachment folder or root folder in Smartview.- Enhancements for configuration setting validations and tooltips.			

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OHIO

DOCUMENTS

Escrow

<i>DOSSS Form</i>			
New/Mod Change Request	Requested By CT NOH	Incident No.	TFS No. 843652
Adjusted to keep to one page.			
Affected item(s): OHD1231.doc - DOSSS Form			

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<i>File Cover CTT</i>			
New/Mod Change Request	Requested By CT OH	Incident No. INC240438528	TFS No. 842982
Added endorsements under lender and a line for Ashtabula deed approval.			
Affected item(s): OHD1244.doc - File Cover CTT			

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OKLAHOMA

DOCUMENTS

Escrow

<u>Recordables</u>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	OK	INC240424639	843517
Updated to recordable standards.			
<u>Affected item(s):</u>			
OKD1017.doc - Affidavit (No HOA)			
OKD1065.doc - Real Estate Mortgage			
OKD1089.doc - Promissory Note (Installment)			
OKD1155.doc - Affidavit (Mortgage Tax - Tulsa County)			
OKD1188.doc - Affidavit (Identity and Authorization)			
OKD1204.doc - Resolution (LLC)			
OKD1212.doc - General Release			
OKD1213.doc - Memorandum of Trust			
OKD1217.doc - Release of Note			
OKD1223.doc - Affidavit (Acceptance Pursuant to Transfer On Death)			
OKD1224.doc - Affidavit of Consent			
OKD1225.doc - Affidavit (Scriveners Error)			
OKD1226.doc - Affidavit (Stray Instrument)			
OKD1227.doc - Affidavit (Record Copy County Records)			
OKD1228.doc - Affidavit (Assignment of First Right of Refusal)			
OKD1229.doc - Agreement (Boundary Line)			
OKD1237.doc - Affidavit (ReRecording)			
OKD1242.doc - Mortgage Tax Information			
OKD1246.doc - Affidavit (Special Assessment)			
OKD1250.doc - Affidavit (Evidentiary)			
OKD1254.doc - Preliminary Lender Opinion			
OKD1266.doc - Assignment of Mortgage			
OKD1268.doc - Affidavit (Ownership)			
OKD1275.doc - Affidavit (Owner in Possession)			
OKD1276.doc - Affidavit (Concerning Encroachments)			
OKD1284.doc - Affidavit (Federal Estate Tax)			
OKD1297.doc - Release of Contract for Deed			
OKD1299.doc - Affidavit (Owner (Individual))			
OKD1330.doc - Affidavit (Non-Identity)			

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OREGON

DOCUMENTS

Escrow

<i>Resolution (LLC)</i>			
New/Mod Change Request	Requested By Penny Hoskins	Incident No.	TFS No. 842756
Updated "signor" to "signer".			
Affected item(s): ORD1519.doc - Resolution (LLC)			

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<i>Wire Account Notification with Wire Fraud Alert Notice (NCS - Commercial)</i>			
New/Mod Change Request	Requested By CT Portland	Incident No.	TFS No. 842760
Added "If you have any questions, please contact an employee listed below."			
Affected item(s): SSCORPD5937.doc - Wire Account Notification with Wire Fraud Alert Notice (NCS - Commercial)			

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INTEGRATIONS

Enhanced Order Creation

New/Mod New	Requested By	Incident No.	TFS No.
<p>Installation of Enhanced Order Creation v1.1.0.0.</p> <p>This integration provides the user with the ability at order creation to perform a duplicate order search before creating an order. From the search results, the user can continue to create a new order, create a new order and pull (limited) information into the new order from an existing order or open an existing order and forego creating a new order.</p> <p>Related document: Enhanced Order Creation – Using the Duplicate Order Search when Opening an Order.</p>			

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Rate Validation Tool

New/Mod Mod	Requested By	Incident No.	DEVOPS No.																		
<p>This release includes:</p> <ul style="list-style-type: none"> > The name change to the Additional Title Premiums tab to Additional Title Charges. <table border="1"> <thead> <tr> <th>SPS Description</th> <th>RS Description</th> <th>SoftPro Premium Amount</th> <th>RS Premium Amount</th> <th>Matched</th> <th>Skip Correction</th> </tr> </thead> <tbody> <tr> <td>Escrow Fee</td> <td>Residential Loan Escrow ...</td> <td>\$550.00</td> <td>\$550.00</td> <td>Yes</td> <td><input type="checkbox"/></td> </tr> <tr> <td></td> <td>Escrow/Settlement Agen...</td> <td>\$0.00</td> <td>\$56.10</td> <td>N/A</td> <td><input type="checkbox"/></td> </tr> </tbody> </table>				SPS Description	RS Description	SoftPro Premium Amount	RS Premium Amount	Matched	Skip Correction	Escrow Fee	Residential Loan Escrow ...	\$550.00	\$550.00	Yes	<input type="checkbox"/>		Escrow/Settlement Agen...	\$0.00	\$56.10	N/A	<input type="checkbox"/>
SPS Description	RS Description	SoftPro Premium Amount	RS Premium Amount	Matched	Skip Correction																
Escrow Fee	Residential Loan Escrow ...	\$550.00	\$550.00	Yes	<input type="checkbox"/>																
	Escrow/Settlement Agen...	\$0.00	\$56.10	N/A	<input type="checkbox"/>																

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RHODE ISLAND

DOCUMENTS

Title

<i>ALTA Homeowner's Policy of Title Insurance 2021 (RI)</i>			
New/Mod New Request	Requested By	Incident No.	TFS No. 842401
This form is a state and product-specific version of the 2021 ALTA Homeowner's Policy of Title Insurance to be used in lieu of Master Owner's Policy for faster document rendering.			
Affected item(s): RID1023.doc - ALTA Homeowner's Policy of Title Insurance 2021 (RI)			

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TENNESSEE

DOCUMENTS

Title

<i>Revolving Credit Endorsement A - Obligatory Advances (Majority Law)</i>			
<i>Revolving Credit Endorsement B - Obligatory Advances (Minority Law)</i>			
<i>Revolving Credit Endorsement C - Optional Advances (Majority Law)</i>			
<i>Revolving Credit Endorsement D - Optional Advances (Minority Law)</i>			
New/Mod New Request	Requested By TN State Counsel	Incident No.	TFS No. 843322
Four new Revolving Credit endorsements are now available for issuance on properties in the state of Tennessee, as per direction of TN State Counsel.			

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TEXAS

DOCUMENTS

Escrow

<i>Abstractor's Search</i>			
New/Mod Change Request	Requested By Houston	Incident No.	TFS No. 842718
Revised GF# to Order No. for CPF Houston.			
Affected item(s): TXFNFESC_AbtractorsReport.doc - Abstractor's Search			

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INTEGRATIONS

Rate Validation Tool

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

- › The **Endorsement Code T-02 SASONR – T-3 Amendment of Survey Exception** for T-1 (T-3 or Deletion) now shows in the **Comparison View** when added to an Owner’s Policy.

NOTE: The residential equivalent, **Code T-03 SASOR**, already shows.

SPS Description	RS Description	SoftPro Premium Amount	RS Premium Amount	Matched	Skip Correction
Escrow Fee	Residential Loan Escrow ...	\$550.00	\$550.00	Yes	<input type="checkbox"/>
	Escrow/Settlement App...	\$0.00	\$56.10	N/A	<input type="checkbox"/>

- › When either of the Owner’s Endorsement Codes, **T-19.1** or **T-19.1_24**, are selected along with the **T-03 SASONR** or **T-03 SASOR** entry, the **Rate Summary View** tab shows the endorsement as being issued with the Amendment.

Rate Summary View (3) | Audit View

Title Premiums Escrow Premiums Title & Escrow Premiums Save & Close

General

How many ADDITIONAL chains of title are involved in the issuance of the policy(s) in this transaction?

Products

Owners Policy

Select the amendment(s) that apply to this form (if applicable) (T-03 SASOR for Residential and T-03 SASONR for Nonresidential) Yes No

Endorsements

Owners Policy

T-19.1 Restrictions, Encroachments, Minerals Endorsement-Owner's Policy - 2024

Select the amendment(s) that apply to this form (if applicable) (T-03 SASOR for Residential and T-03 SASONR for Nonresidential) Yes No

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REPORTS

Batch Stale Dated Check Letter

New/Mod Change Request	Requested By DSG Admin	Incident No.	TFS No. 843361
----------------------------------	----------------------------------	---------------------	--------------------------

Modified logic on Due Diligence Letter. Last month's logic change to the 'Stale Dated Letter' for the profiles below affected the Due Diligence Letter. This has been corrected.

- "\\Default\PTX\DAL CPF\CT' and all its child profiles
- "\\Default\PTX\DAL CPF\FT\ESC' and all its child profiles
- "\\Default\PTX\South Texas OAC \Central Texas CPF\SAN ANTONIO-CPF\CT\FT' and all its child profiles
- "\\Default\PTX\South Texas OAC \South Texas CPF\AT\FT\FT\R\ESC' and all its child profiles
- "\\Default\PTX\South Texas OAC \South Texas CPF\CT\R\ESC' and all its child profiles

Affected item(s):
SSCORP5237.rpt - Stale Dated Check Letter

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UTAH

DOCUMENTS

Escrow

<i>Letter (First Lien)</i>			
New/Mod New Request	Requested By UT	Incident No.	TFS No. 842914
New document. Please render to view.			
Affected item(s): UTD1136.doc - Letter (First Lien)			

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WASHINGTON

DOCUMENTS

Escrow

<i>Automatic Homestead Questionnaires (3)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	CT Seattle		842735
Updated to add new language to item 5. Please render to view.			
<p>Affected item(s): WA0000006.doc - Automatic Homestead Questionnaire - Buyer WA0000006.doc - Automatic Homestead Questionnaire - Seller WA00000914.doc - Automatic Homestead Questionnaire (Non-Party)</p>			

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<i>REETAs (12)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	Penny Hoskins		842726
Update to pull the 2nd individual's phone number if the first one is left empty. Also, both 11/1/2024 and 12/1/2024 versions are now available.			
<p>Affected item(s): WA00000305.doc - Master Real Estate Excise Tax Affidavit (11/01/2024) Multi Deed WA00000307.doc - MH Real Estate Excise Tax Affidavit (11/01/2024) WA00001070.doc - Master Real Estate Excise Tax Affidavit (11/01/2024) WA00001072.doc - Master Real Estate Excise Tax Affidavit (11/01/2024) Multiple Location WA00001074.doc - Master Real Estate Excise Tax Affidavit (11/01/2024) Exempt WA00001075.doc - Master Real Estate Excise Tax Affidavit (11/01/2024) Multiple Affidavits WA00000306.doc - MH Real Estate Excise Tax Affidavit (12/01/2024) WA00001036.doc - Master Real Estate Excise Tax Affidavit (12/01/2024) Multi Deed WA00001088.doc - Master Real Estate Excise Tax Affidavit (12/01/2024) WA00001089.doc - Master Real Estate Excise Tax Affidavit (12/01/2024) Multiple Location WA00001090.doc - Master Real Estate Excise Tax Affidavit - Exempt (12/01/2024) WA00001091.doc - Master Real Estate Excise Tax Affidavit (12/01/2024) Multiple Affidavits</p>			

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Title

<i>ALTA Commitment 2021 (WA)</i>			
New/Mod Change Request	Requested By WA Admin	Incident No.	TFS No. 844288
<p>For Washington operations (not NCS) Logic has been added to enable the Property Address reference to optionally appear at the top of Schedule A. The document will prompt when rendered to allow the user to omit the Property Address. If the prompt is checked the Property Address will not print, otherwise, it will show on Schedule A of the commitment.</p>			
<p>Affected item(s): WA00001078.doc - ALTA Commitment 2021 (WA)</p>			

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Rate Validation Tool

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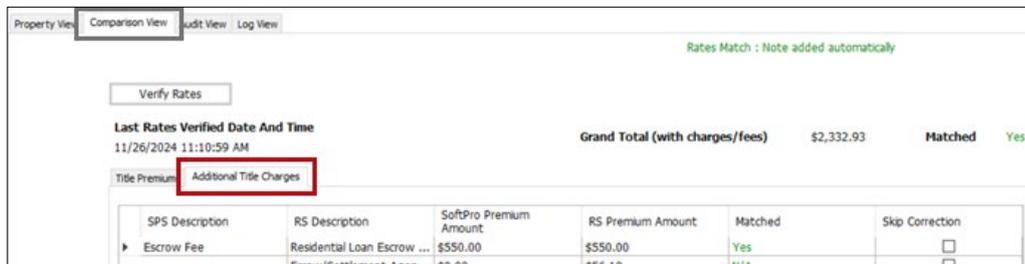
This release includes:

- › 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 Charges**, 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 Charges** 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/charges 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



Rate Validation Tool

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

» 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.

The screenshot shows the 'Additional Title Premiums' tab in the Rate Validation Tool. It displays a table with columns for SPS Description, RS Description, SoftPro Premium Amount, RS Premium Amount, and Matched status. A 'Skip Correction' column is highlighted with a red box, containing checkboxes for each row. The 'Verify Rates' and 'Pull ATC Rates' buttons are visible at the top.

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 ins...	\$100.00	\$200.00	No	<input type="checkbox"/>

Related document: [Rates – Verifying Rates \(Title/End/ATC\) Using Rate Services](#)



REPORTS

Pre-Listing Task Completed

New/Mod Change Request	Requested By PacNW IT	Incident No.	TFS No. 844664
Updated to look for tasks equal to "Pre-Listing Converted".			
Affected item(s): SSCORP5418.rpt - Pre-Listing Task Completed			

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WYOMING

DOCUMENTS

Title

ALTA Homeowner's Policy of Title Insurance 2021 (WY)			
New/Mod New Request	Requested By	Incident No.	TFS No. 842395
This form is a state and product-specific version of the 2021 ALTA Homeowner's Policy of Title Insurance to be used in lieu of Master Owner's Policy for faster document rendering.			
Affected item(s): WYD1011.doc - ALTA Homeowner's Policy of Title Insurance 2021 (WY)			

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LIBERTY TITLE

DOCUMENTS

Escrow

<i>Affidavit (Baltimore City)</i>			
New/Mod New Request	Requested By Liberty Title	Incident No. INC240427743	TFS No. 842854
New document. Please render to view.			
Affected item(s): MDD1152.doc - Affidavit (Baltimore City)			

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<i>Wire Information</i>			
New/Mod Change Request	Requested By Liberty Title	Incident No. INC240431272	TFS No. 842863
Updated to remove reference to cashier's check.			
Affected item(s): SSCORPD1807.doc - Wire Information SSCORPD5330.doc - Wire Information (International)			

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NCS

DOCUMENTS

Title

<i>Coinsurance Endorsement signatures</i>			
New/Mod Change Request	Requested By Atlanta NCS	Incident No.	TFS No. 843622
<p>For NCS Atlanta only, updating to show the countersignature image and name for the Issuing Co-insurer and additional Co-Insurers are a Fidelity Family Underwriters. If out of family, updated to show the blank signature block with SEE ATTACHED.</p>			
<p>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>Issuing Co-Insurer: Fidelity National Title Insurance Company, P.O. Box 45023, Jacksonville, FL 32232-5023</p> <p>  _____ Signature </p> <p> _____ Date <u>December 2, 2024</u> </p> <p>By: <u>John Doe</u> _____ Authorized Officer or Agent</p> <p>Co-Insurer: First American Title Insurance Company, 123 Underwriter Drive, Greenville SC 12345</p> <p> _____ SEE ATTACHED Signature </p> <p> _____ Date </p> <p>By: _____ _____ Print Name</p> <p>Its: _____ _____ Print Title</p>			

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REPORTS

<i>Commercial Starter Policy Extract</i>			
New/Mod	Requested By	Incident No.	TFS No.
New Request	NCS Atlanta Admin		830507
New Report for NCS Atlanta.			
Affected item(s): SSCORP5612.rpt - Commercial Starter Policy Extract			

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<i>Invoices</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	NCS FNT SoCal Admin, NCS PHX		841775
Updated as follows:			
<ol style="list-style-type: none"> 1. Removed operation for NCS PHX. 2. Updated for NCS SoCal AZ, UT to pull policy version for Guarantees. 			
Affected item(s): SSCORPD5021.spdoc - Invoice SSCORPD3003.spdoc - Consolidated Invoice			

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<i>Universal Revenue Sharing Deal Sheet (agent and branch)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Fix	NCS		843506
Corrected document error when escrow fees, recording fees or title exam/search fees has a comma entered.			
Affected item(s): SSCORPD3001.spdoc - Universal Revenue Sharing Deal Sheet (agent and branch)			

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PROPERTY TITLE & ESCROW

DOCUMENTS

Escrow

<i>Report of Title - Philadelphia Housing Authority</i>			
New/Mod	Requested By	Incident No.	TFS No.
New Request	Property Title & Escrow		842645
New document. Please render to view.			
<u>Affected item(s):</u> COMD1293.doc - Report of Title - Philadelphia Housing Authority			

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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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