

# SOFTPRO SELECT

March 2025

RELEASE NOTES



Testing Release Date: February 28, 2025  
**Production Release Date: March 10, 2025**



TABLE OF CONTENTS

ALL STATES/SITES..... 8

DOCUMENTS..... 8

    Escrow ..... 8

*Assignor Tax Information for 1099-MISC* ..... 8

INTEGRATIONS ..... 9

*Enhanced Order Creation* ..... 9

*Smartview Accounting Forms* ..... 10

*Smartview Auto Document Generation* ..... 11

REPORTS ..... 12

*Commitment/Policy Status* ..... 12

*Customer Report Card* ..... 12

*Escrow Trial Balance* ..... 12

*Escrow Trial Balance - Compact* ..... 12

*Escrow Trial Balance (with IBA Balances)* ..... 12

*Funds Flow Summary* ..... 13

*New Orders By Branch* ..... 13

*Opened/Closed Orders with Contact Search*..... 13

*Opened/Closed Orders with Contact Search*..... 13

*Order Count/Revenue Summary*..... 13

*Settlement Statements (CSS)* ..... 14

*SPAdmin-Custom Source of Business Export*..... 14

*SPAdmin-Custom Source of Business Export-Missing Fields* ..... 14

*Template Applied*..... 14

ALABAMA ..... 15

    INTEGRATIONS ..... 15

*Deposit Transfer Tool* ..... 15

*ValueCheck LinkIt*..... 15

CALIFORNIA..... 16

    DOCUMENTS..... 16

        Escrow ..... 16

*(EIS) Documents* ..... 16

*EI Authorization to Pay Bills* ..... 16

*EI Refi - 1 Page (esign)*..... 17

        Escrow/Title..... 18

*Substitution of Trustee Full Reconveyance (RECON-SUB)*..... 18



**RELEASE NOTES**

**MARCH 2025**

Title ..... 19

*CLTA Preliminary Report Form 2006 and 2023 (SoCal)* ..... 19

*CLTA Preliminary Report Form 2006 and 2023 (CA - SOCAL)* ..... 19

REPORTS ..... 20

*Closings by Post Date - FNT LA* ..... 20

*EPU Reports*..... 20

*Opened/Closed Orders by {Selection} - FNT LA* ..... 20

*Opened/Closed Orders by Branch, Escrow Officer* ..... 20

*Policy Fallout* ..... 20

*Settlement Statements*..... 21

COLORADO..... 22

    DOCUMENTS..... 22

        Escrow ..... 22

*Builder's Outline of Procedures and Approval*..... 22

*Cashier's Check Request*..... 22

*Certificate of Permanent Location for a MH* ..... 22

*Credit Card Payments - Courtesy Payoff* ..... 22

*Release of DOT No Evidence (2024) (2)*..... 22

    INTEGRATIONS ..... 23

*ValueCheck Property Search (Address Validation Tool)* ..... 23

CONNECTICUT ..... 24

    INTEGRATIONS ..... 24

*Deposit Transfer Tool* ..... 24

*ValueCheck LinkIt*..... 24

DELAWARE ..... 25

    DOCUMENTS..... 25

        Title ..... 25

*DTIRB Form Filing of ALTA Forms Adopted 4-2-2024* ..... 25

FLORIDA..... 26

    DOCUMENTS..... 26

        Escrow ..... 26

*Mortgage Deed (Balloon Mortgage)* ..... 26

    INTEGRATIONS ..... 27

*Smartview Accounting Forms* ..... 27

HAWAII ..... 28

    DOCUMENTS..... 28

        Phrase(s)..... 28



**RELEASE NOTES**

**MARCH 2025**

- New EI Phrase* ..... 28
- ILLINOIS ..... 29
  - DOCUMENTS ..... 29
    - Escrow ..... 29
      - Direction to Pay Cook County Taxes (ACH)* ..... 29
      - WireSafe Fraud Alerts (7)* ..... 29
- REPORTS ..... 30
  - Order Export* ..... 30
- INDIANA ..... 31
  - DOCUMENTS ..... 31
    - Escrow ..... 31
      - ABA (Homebase Title)* ..... 31
      - Agreement (Dry Closing)* ..... 31
- MAINE ..... 32
  - INTEGRATIONS ..... 32
    - Deposit Transfer Tool* ..... 32
    - ValueCheck LinkIt* ..... 32
- MARYLAND ..... 33
  - INTEGRATIONS ..... 33
    - Deposit Transfer Tool* ..... 33
    - ValueCheck LinkIt* ..... 33
- MASSACHUSETTS ..... 34
  - INTEGRATIONS ..... 34
    - Deposit Transfer Tool* ..... 34
    - ValueCheck LinkIt* ..... 34
- MY SCREENS ..... 35
  - Various Screens* ..... 35
- MICHIGAN ..... 37
  - DOCUMENTS ..... 37
    - Escrow ..... 37
      - ABAs ..... 37
      - Date Change (5)* ..... 37
      - Indemnity Personal Undertaking ML (2)* ..... 37
      - Record Title Search and Title Search Update* ..... 37
- MISSOURI ..... 38
  - DOCUMENTS ..... 38
    - Escrow ..... 38



**RELEASE NOTES**

**MARCH 2025**

*Affidavit (Notary)* ..... 38

*Authorization and Direction of Funds* ..... 38

*Certification of Trust - Generic* ..... 38

*Certification of Trust - Generic* ..... 38

*Durable Power of Attorney* ..... 38

*Stop Payment Request* ..... 39

*WireSafe Fraud Alerts (2)* ..... 39

NEBRASKA..... 40

DOCUMENTS..... 40

    Title ..... 40

*SE 554 - Maximum Actual Loss (KS, MO, NE)*..... 40

NEVADA ..... 41

DOCUMENTS..... 41

    Escrow ..... 41

*Disclosure Related to Escrowed Funds*..... 41

*Grant Bargain and Sale Deed with DOV (Nevada)*..... 41

*Solar Acknowledgment* ..... 41

REPORTS ..... 42

*Opened/Closed Orders* ..... 42

*Title Product Exceptions* ..... 42

NEW YORK..... 43

DOCUMENTS..... 43

    Escrow ..... 43

*Bankruptcy Search (Syracuse)*..... 43

*Endorsement Request Form* ..... 43

    Title ..... 44

*Master Commitment (NNY)*..... 44

NORTH CAROLINA ..... 45

INTEGRATIONS ..... 45

*Deposit Transfer Tool* ..... 45

*ValueCheck LinkIt*..... 45

REPORTS ..... 46

*Order Count and Revenue by Attorney Payee Code*..... 46

OHIO..... 47

DOCUMENTS..... 47

    Escrow ..... 47

*Add eSign to Tree Titles (15)* ..... 47



**RELEASE NOTES**

**MARCH 2025**

*New Order Sheet* ..... 47

OREGON ..... 48

DOCUMENTS..... 48

Escrow ..... 48

*Construction Disbursement Agreement*..... 48

*Els (2)* ..... 48

*Instructions (Preparation of Deed)* ..... 48

*Instructions (Prepare Note and Trust Deed)*..... 48

*Instructions (Prepare Unsecured Note)* ..... 48

PENNSYLVANIA..... 49

INTEGRATIONS ..... 49

*Deposit Transfer Tool* ..... 49

*ValueCheck LinkIt*..... 49

SOUTH CAROLINA..... 50

INTEGRATIONS ..... 50

*Deposit Transfer Tool* ..... 50

*ValueCheck LinkIt*..... 50

TEXAS ..... 51

DOCUMENTS..... 51

Escrow ..... 51

*Affiliated Business Arrangements (2)* ..... 51

UTAH ..... 52

DOCUMENTS..... 52

Escrow ..... 52

*Letter (Seller Financing Payment)*..... 52

VIRGINIA ..... 53

INTEGRATIONS ..... 53

*Deposit Transfer Tool* ..... 53

*ValueCheck LinkIt*..... 53

WASHINGTON..... 54

DOCUMENTS..... 54

Escrow ..... 54

*Dedication for Subdivision Platting*..... 54

*Power of Attorney POA Instructions*..... 54

WEST VIRGINIA ..... 55

INTEGRATIONS ..... 55

*Deposit Transfer Tool* ..... 55



**RELEASE NOTES**

**MARCH 2025**

*ValueCheck LinkIt*..... 55

LIBERTY TITLE..... 56

    REPORTS ..... 56

*MMP Orders* ..... 56

*Title Grading* ..... 56

NCS ..... 57

    DOCUMENTS..... 57

        Escrow ..... 57

*Payment Transmittal form by Property (4)*..... 57

MY SCREENS ..... 58

*Property Screen*..... 58

REPORTS ..... 59

*CO SoftPro Summary* ..... 59

*Invoice Statement* ..... 59

*Loan Statement* ..... 59

*NY Application* ..... 59

*Order Exceptions* ..... 60

*Transaction Form*..... 60

*Transaction Form*..... 60



ALL STATES/SITES

DOCUMENTS

Escrow

<a href="#"><i>Assignor Tax Information for 1099-MISC</i></a>			
<b>New/Mod</b> Change Request	<b>Requested By</b> Settlement	<b>Incident No.</b>	<b>TFS No.</b> 857194
Updated email to 1099assignments@fnf.com.			
<b>Affected item(s):</b> SSCORPD0264.doc - Assignor Tax Information for 1099-MISC			

[Back to Table of Contents](#)



INTEGRATIONS

*Enhanced Order Creation*

New/Mod Mod	Requested By	Incident No.	TFS No.
<p>**ALL SITES (EXCEPT OR)</p> <p>This release includes:</p> <ul style="list-style-type: none"><li>• Removal of templates from Search Results when looking for duplicate orders.</li></ul> <p>RESOLVED: Column sort (^) icon position persists between searches.</p> <p>RESOLVED: State removed from Search screen in multi-property file Search Results.</p> <p>RESOLVED: Duplicate Properties Warning message displays where orders have only one property.</p> <p>RESOLVED: Search Results dialog box displaying in upper-left corner versus center of screen.</p> <p>RESOLVED: When multiple monitors are used, the Search Results dialog box displays in the center of the screen of the default (primary) monitor versus the monitor where Select is opened.</p>			

[Back to Table of Contents](#)

*Smartview Accounting Forms*

New/Mod Mod	Requested By	Incident No.	TFS No.
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\*\*ALL SITES (EXCEPT FL)

This release includes:

- Increase logging statements.
- Process entries in the aaf.DocumentsQueue table, *Order is invalid or Empty*.  
AutoAccountingForms.RetryTimePeriodMinutes configurable attribute has been updated from 2 minutes to 5 minutes.
- The tool has been updated to use the new Default Folder v2.0.0.0 release for sending documents to the correct folder.
- Entries written to the Accounting Forms queue and lot table will now reference Accounting Summary instead of Disbursement Summary.
- Security vulnerability addressed.
- The Accounting Summary report name changed to Disbursement Summary.

RESOLVED: Duplicate entries written to the **aaf2.ApplicationLog** table, *Order is invalid or Empty*.

RESOLVED: Error written to the Event viewer without notifying the user the document did not publish.

A message displays identifying the failed Document and the document will need to be manually published to Smartview and Attachments.

RESOLVED: Transaction form and Accounting Summary not being published to Order Attachments when a character not supported by Select existed in the name.

RESOLVED: Documents are not published to Order Attachment or a significant delay experienced.

RESOLVED: Issue where the user was presented with a message that forms were being published and sometimes received error messages that forms could not be published.

RESOLVED: Select closing when a user not assigned to an order's owning profile opened and closed the related ledger in ProTrust.

RESOLVED: An error is thrown when an accounting user is reposting erroneously voided checks and is not assigned to the check printing manager where the checks were originally printed.

RESOLVED: Memory issue where orders, not open in UI, had a hook to AutoAccountingForms after Ledger Transfers have been processed.

[Back to Table of Contents](#)



<i>Smartview Auto Document Generation</i>			
<b>New/Mod</b>	<b>Requested By</b>	<b>Incident No.</b>	<b>TFS No.</b>
New			
<p>**ALL SITES (Except FL/NM)</p> <p>Installation of Smartview Auto Document Generation v1.4.2.0.</p> <p>This integration allows for the automatic generation of selected documents in SoftPro Select and subsequent publication of those documents by leveraging the Default Folder functionality to the Select Order Attachments and the corresponding Smartview folder mapped in the Default Folder application.</p> <p>The integration is available only after the operation has met with SoftPro Configuration to determine when and which documents are to be activated.</p>			

[Back to Table of Contents](#)



REPORTS

<i>Commitment/Policy Status</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	CT Ven Admin		855491
Added Order and Product Type to the Excel export.			
<b>Affected item(s):</b> SSCORP5378.rpt - Commitment/Policy Status			

[Back to Table of Contents](#)

<i>Customer Report Card</i>			
New/Mod	Requested By	Incident No.	TFS No.
Fix	Pac NW IT		855351
Fixed Typo for "Refinance".			
<b>Affected item(s):</b> SSCORP5256.rpt - Customer Report Card			

[Back to Table of Contents](#)

<i>Escrow Trial Balance</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	CLT NY NCS		854625
Added option to group by bank.			
<b>Affected item(s):</b> SSCORP0003.rpt - Escrow Trial Balance			

[Back to Table of Contents](#)

<i>Escrow Trial Balance - Compact</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	CLT NY NCS		854627
Adding option to group by bank.			
<b>Affected item(s):</b> SSCORP5609.rpt - Escrow Trial Balance - Compact			

[Back to Table of Contents](#)

<i>Escrow Trial Balance (with IBA Balances)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	CLT NY NCS		854630
Adding option to group by bank.			
<b>Affected item(s):</b> SSCORP5025.rpt - Escrow Trial Balance (with IBA Balances)			

[Back to Table of Contents](#)



## RELEASE NOTES

## MARCH 2025

### Funds Flow Summary

New/Mod	Requested By	Incident No.	TFS No.
Change Request	FNTG Comm Counsel		855483
Added "ALL pending Transactions only" option.			
<b>Affected item(s):</b> SSCORPD5863.spdoc - Funds Flow Summary			

[Back to Table of Contents](#)

### New Orders By Branch

New/Mod	Requested By	Incident No.	TFS No.
Change Request	UT CT NCS		855402
Added "Alternate" checkbox parameter; when checked the format changes and includes Listing and Selling Agents, and property address.			
<b>Affected item(s):</b> SSCORP5186.rpt - New Orders By Branch			

[Back to Table of Contents](#)

### Opened/Closed Orders with Contact Search

New/Mod	Requested By	Incident No.	TFS No.
Change Request	Jay West		855791
Added 'Property State' to 'Excel export - Buyers Info Only'.			
<b>Affected item(s):</b> SSCORP5297.rpt - Opened/Closed Orders with Contact Search			

[Back to Table of Contents](#)

### Opened/Closed Orders with Contact Search

New/Mod	Requested By	Incident No.	TFS No.
Change Request	Pac NW IT		854633
Updated the Excel Standard version to add Agent people contacts phone number columns after columns AB and AE respectively. If more than one, they will be concatenated.			
<b>Affected item(s):</b> SSCORP5297.rpt - Opened/Closed Orders with Contact Search			

[Back to Table of Contents](#)

### Order Count/Revenue Summary

New/Mod	Requested By	Incident No.	TFS No.
Fix	FNT OR Admin / FNFi Rpt Team Admin		854614
Fixed entries that are at the end of the page and were also displaying in the next page depending on the group.			
<b>Affected item(s):</b> SSCORP5092.rpt - Order Count/Revenue Summary			

[Back to Table of Contents](#)



## RELEASE NOTES

## MARCH 2025

### Settlement Statements (CSS)

New/Mod	Requested By	Incident No.	TFS No.
Fix	Config		855554

Updated to have the 'Amended' statuses function like the (None) document status, where the sigs go in the next page after totals.

**Affected item(s):**

SSCORPD3006.spdoc - Master Statement (CSS)  
 SSCORPD3007.spdoc - Buyer/Borrower Statement (CSS)  
 SSCORPD3008.spdoc - Seller's Statement (CSS)  
 SSCORPD3009.spdoc - Individual Statement (CSS)  
 SSCORPD3010.spdoc - Property Statement (CSS)

[Back to Table of Contents](#)

### SPAdmin-Custom Source of Business Export

New/Mod	Requested By	Incident No.	TFS No.
Change Request	FNFi Rpt Admin		855356

Updated the County Manager and County Operation names for CTI Houston, FNT, CTI and TTC Greater Seattle, FNT and CTI Las Vegas.

**Affected item(s):**

SSCORP5255.rpt – SPAdmin-Custom Source of Business Export

[Back to Table of Contents](#)

### SPAdmin-Custom Source of Business Export-Missing Fields

New/Mod	Requested By	Incident No.	TFS No.
Change Request	FNFi Rpt Admin		855362

Updated the County Manager and County Operation names for CTI Houston, FNT, CTI and TTC Greater Seattle, FNT and CTI Las Vegas.

**Affected item(s):**

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

[Back to Table of Contents](#)

### Template Applied

New/Mod	Requested By	Incident No.	TFS No.
Change Request	Escrow Connect Admin		853063

Added Report Type dropdown parameter to select Open or Completed.

**Affected item(s):**

SSCORP5263.rpt - Template Applied

[Back to Table of Contents](#)



ALABAMA

INTEGRATIONS

<i>Deposit Transfer Tool</i>			
New/Mod	Requested By	Incident No.	TFS No.
New			
Installation of Deposit Transfer Tool v4.3.2.3.  Provides commercial escrow users the ability to transfer funds from a single order receiving funds to multiple corresponding orders using the same profile and trust account.			

[Back to Table of Contents](#)

<i>ValueCheck LinkIt</i>			
New/Mod	Requested By	Incident No.	TFS No.
New			
Installation of ValueCheck LinkIt v1.18.0.0.  Provides users the ability to link requirements, exceptions, and legal descriptions through a single step to documents stored in their corresponding Smartview orders.  <b>NOTE:</b> This integration is permission based and may not be enabled for all users.			

[Back to Table of Contents](#)



CALIFORNIA

DOCUMENTS

Escrow

<u>(EIS) Documents</u>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	Settlement		854747
Removing the CA license language from page 1 per Settlement.			
<p><b>Affected item(s):</b>            SCA0000064.doc - EI CAR Amendment (EIS)            SCA0000066.doc - CAR Acceptance Letter - Buyer            SCA0000066.doc - CAR Acceptance Letter - Seller            SCA0000082.doc - EI Deed in Lieu            SCA0000101.doc - EI Assignment of Promissory Note &amp; DT (EIS)            SCA0000103.doc - EI Lender's Escrow Instructions (Private Party) (EIS)            SCA0000104.doc - EI Loan (EIS)            SCA0000106.doc - EI Sale (EIS)            SCA0000311.doc - EI Wrap Instructions (EIS)            SCA0000312.doc - EI Bulk Sale of Business (EIS)            SCA0000313.doc - EI Bulk Sale of Business with Transfer of Liquor License (EIS)            SCA0000315.doc - EI Commercial Sale (EIS)            SCA0000316.doc - EI Dealer Sale of a New Manufactured Home (EIS)            SCA0000317.doc - EI No Dealer Sale of Manufactured Home (EIS)            SCA0000318.doc - EI Dealer Sale of a Used Manufactured Home (EIS)            SCA0000319.doc - EI Real Property and Manufactured Home (EIS)            SCA0000320.doc - EI Manufactured Home Loan            SCA0000321.doc - EI Refinance/Loan Manufactured Home            SCA0000322.doc - EI Bulk Alcoholic Beverage License Transfer (EIS)            SCA0001337.doc - EI Loan Modification            SCA0002225.doc - EI Dealer Sale Oasis Manufactured Home (EIS)            SCA0002537.doc - EI Sale HUD Division (EIS)            SCA0002626.doc - EI Bulk Transfer (EIS)            SCA0002627.doc - EI Bulk and Liquor License Transfer (EIS)            SCA0002868.doc - Escrow Acceptance Letter - MHP            SCA0002869.doc - Escrow Acceptance Letter - AIRCAR            SCA0002870.doc - Escrow Acceptance Letter - Attorney            SCA0002871.doc - EI Bill of Sale Personal Property (EIS)            SCA0002991.doc - EI Divestiture (EIS)            SCA0003102.doc - EI Escrow Instructions and GP (EIS)(NCS)            SCA0003118.doc - EI Vacant Land (CAR) (EIS)            SCA0003119.doc - EI Sale (Supp CAR-New Construction) (EIS)</p>			

[Back to Table of Contents](#)

<u>EI Authorization to Pay Bills</u>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	FNT NoCal	INC250042298	855403
Updated to work for other contact types of credit card or misc. payoff.			
<p><b>Affected item(s):</b>            SCA0000039.doc - EI Authorization to Pay Bills</p>			

[Back to Table of Contents](#)



## RELEASE NOTES

MARCH 2025

<a href="#">EI Refi - 1 Page (esign)</a>			
New/Mod	Requested By	Incident No.	TFS No.
New Request	LT SoCal		856870
New document. Please render to view.			
This will be placed in the same tree folders as "EI Refi - 1 Page (esign)".			
<b>Affected item(s):</b> SCA0003270.doc - EI Refi - 1 Page (esign)			

[Back to Table of Contents](#)



Escrow/Title

*Substitution of Trustee Full Reconveyance (RECON-SUB)*

<b>New/Mod</b> Change Request	<b>Requested By</b> State Counsel/ CT Orange	<b>Incident No.</b>	<b>TFS No.</b> 855746
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Additional language added:

And whereas the indebtedness secured, to be paid by the Deed of Trust above mentioned has been fully paid and/or satisfied.

**Affected item(s):**

SCA0000293.doc - Substitution of Trustee Full Reconveyance (RECON-SUB)

[Back to Table of Contents](#)



Title

<a href="#"><i>CLTA Preliminary Report Form 2006 and 2023 (SoCal)</i></a>			
<b>New/Mod</b> Change Request	<b>Requested By</b> Tracy Leonard	<b>Incident No.</b>	<b>TFS No.</b> 855411
Updating phone number in header for LT SoCal to be title office phone number.			
<b>Affected item(s):</b> SCA0002918.doc - CLTA Preliminary Report Form 2006 (CA - SOCAL) SCA0003004.doc - CLTA Preliminary Report Form 2023 (CA - SOCAL)			

[Back to Table of Contents](#)

<a href="#"><i>CLTA Preliminary Report Form 2006 and 2023 (CA - SOCAL)</i></a>			
<b>New/Mod</b> Change Request	<b>Requested By</b> Southwest NCS	<b>Incident No.</b>	<b>TFS No.</b> 857036
For NCS only, updating to show the Escrow Company's Reference number for Title Only orders.			
<b>Affected item(s):</b> SCA0002918.doc - CLTA Preliminary Report Form 2006 (CA - SOCAL) SCA0003004.doc - CLTA Preliminary Report Form 2023 (CA - SOCAL)			

[Back to Table of Contents](#)



REPORTS

<i>Closings by Post Date - FNT LA</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	FNT LA Acc Admin.		855349
Moved the Selling and Buying Agents to show in the same column and adding Escrow Company Column.			
<b>Affected item(s):</b> SSCORP5586.rpt - Closings by Post Date - FNT LA			

[Back to Table of Contents](#)

<i>EPU Reports</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	NoCal EPU Admin		851467
Updated tasks for NoCal.			
<b>Affected item(s):</b> SSCORP5149.rpt - EPU Task Summary/Productivity by County Manager SSCORP5150.rpt - EPU Task Summary/Productivity by Employee SSCORP5152.rpt - EPU Trends			

[Back to Table of Contents](#)

<i>Opened/Closed Orders by {Selection} - FNT LA</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	FNT SoCal Escrow Admin		854508
Added EO/EA Limits logic for FNT SoCal Pasadena.			
<b>Affected item(s):</b> SSCORP5593.rpt - Opened/Closed Orders by {Selection} - FNT LA			

[Back to Table of Contents](#)

<i>Opened/Closed Orders by Branch, Escrow Officer</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	FNT SoCal Escrow Admin		854512
Added EO/EA Limits logic for FNT SoCal Pasadena.			
<b>Affected item(s):</b> SSCORP5242.rpt - Opened/Closed Orders by Branch, Escrow Officer			

[Back to Table of Contents](#)

<i>Policy Fallout</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	CT IE Title Admin		853073
Updated Canceled definition for CT IE (SoCal) to exclude all files with a status of Canceled in the date range			
<b>Affected item(s):</b> SSCORP5267.rpt - Policy Fallout			

[Back to Table of Contents](#)



## RELEASE NOTES

MARCH 2025

### Settlement Statements

<b>New/Mod</b> Change Request	<b>Requested By</b> CT SoCal	<b>Incident No.</b>	<b>TFS No.</b> 855499
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Updated for CT SoCal Master Settlement Statements will show as "Combined Settlement Statement" in the title

**Affected item(s):**

SSCORPD5454.spdoc - Settlement Statements

[Back to Table of Contents](#)

COLORADO

DOCUMENTS

Escrow

<i>Builder's Outline of Procedures and Approval</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	FNT CO	INC250070811	856872
Updated to most recently provided version for FT operations only.			
<b>Affected item(s):</b> COD1092.doc - Builder's Outline of Procedures and Approval			

[Back to Table of Contents](#)

<i>Cashier's Check Request</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	FT and CT CO	INC250073870; INC250075885	857068
Added 153 - Parker back for FT and added CTC-519-Greeley for CT.			
<b>Affected item(s):</b> COD1125.doc - Cashier's Check Request			

[Back to Table of Contents](#)

<i>Certificate of Permanent Location for a MH</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	CT CO	INC250061908	856147
Corrected acknowledgment.			
<b>Affected item(s):</b> COD1158.doc - Certificate of Permanent Location for a MH			

[Back to Table of Contents](#)

<i>Credit Card Payments - Courtesy Payoff</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	FT CO	INC250047166	855397
Removed paragraph and added new line per request. Please render to view.			
<b>Affected item(s):</b> COD1263.doc - Credit Card Payments - Courtesy Payoff			

[Back to Table of Contents](#)

<i>Release of DOT No Evidence (2024) (2)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	Colorado	INC250064051	856463
Updated to work off of the doc prep screen's information.			
<b>Affected item(s):</b> COD1364.doc - Release of DOT No Evidence (2024) COD1365.doc - Release of DOT No Evidence (2024) - Legal			

[Back to Table of Contents](#)

*ValueCheck Property Search (Address Validation Tool)*

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

- When importing a property in ValueCheck, if the Property Type matches the Select Property Type, the field value remains unchanged.
- When importing a property in ValueCheck, if the Property Type does not match the Select Property Type, the field value is replaced with the mapped value.
- If the imported property's type is not mapped to a Select Property Type, the field value remains unchanged.
- If the imported property's type is mapped to an invalid Select Property Type, the field value remains unchanged.
- If the imported property's type is mapped to an empty Select Property Type, the Select Property Type is updated based on the following conditions:
  - If no template is used and no Custom Order Rules (CORs) specify a Property Type, the Property Type is set to an empty value.
  - If a template with a specified Property Type is used, the Property Type is updated to match the template's Property Type.
  - If Custom Order Rules (CORs) with a specified Property Type are applied, the Property Type is updated to match the CORs Property Type. .
- If the imported property's type is mapped to a Select Property Type and doesn't match the order's type, the field value is replaced with the mapped value if on updating the property, not on new.
- A Warning message is shown in the event viewer if the Property Type Mappings Lookup Table is missing in the ValueCheck Address Validation tool.
- Warning messages updated for VC Property Type when not mapped and VC Property Type is mapped to an invalid Select Property Type.

[Back to Table of Contents](#)



CONNECTICUT

INTEGRATIONS

<i>Deposit Transfer Tool</i>			
New/Mod	Requested By	Incident No.	TFS No.
New			
Installation of Deposit Transfer Tool v4.3.2.3.  Provides commercial escrow users the ability to transfer funds from a single order receiving funds to multiple corresponding orders using the same profile and trust account.			

[Back to Table of Contents](#)

<i>ValueCheck LinkIt</i>			
New/Mod	Requested By	Incident No.	TFS No.
New			
Installation of ValueCheck LinkIt v1.18.0.0.  Provides users the ability to link requirements, exceptions, and legal descriptions through a single step to documents stored in their corresponding Smartview orders.  <b>NOTE:</b> This integration is permission based and may not be enabled for all users.			

[Back to Table of Contents](#)



DELAWARE

DOCUMENTS

Title

*DTIRB Form Filing of ALTA Forms Adopted 4-2-2024*

New/Mod New Request	Requested By DTIRB Form Filing	Incident No.	TFS No. 855662
------------------------	-----------------------------------	--------------	-------------------

The following new DTIRB (ALTA) endorsements are being made available for issuance in SoftPro Select for the state of Delaware:

- ALTA 42 - 2024 - Commercial Lender Group (DTIRB-69)
- ALTA 3.3 - 2024 - \*M\* - Zoning - Completed Improvements - Legal Non-Conforming Use (DTIRB-91)
- ALTA 32 - Construction Loan (DTIRB-92)
- ALTA 32.1 - Construction Loan - Direct Payment (DTIRB-93)
- ALTA 32.2 - Construction Loan - Insured's Direct Payment (DTIRB-94)
- ALTA 33-06 - Construction Loan - Disbursement (DTIRB-95)
- ALTA 10.2 - Collateral Assignment (DTIRB-96)
- ALTA 10.3 - Collateral Assignment and Date Down (DTIRB-97)
- ALTA 48 - Tribal Waivers and Consents (DTIRB-98)
- ALTA 14.1 - 2021 - Future Advance - Knowledge (DTIRB-99)

The following policy is being updated "as modified by DTIRB 04/01/2025)":

- ALTA Short Form Expanded Coverage Residential Loan Policy - Current Assessments 2021

Technical Corrections are in place for the following existing endorsements:

- Waiver of Arbitration (DTIRB-25)
- ALTA 3 - 2021 - \*M\* - Zoning - Unimproved Land (DTIRB-26)
- ALTA 14 - 2021 - Future Advance - Priority (DTIRB-29)
- ALTA 14.2 - 2021 - Future Advance - Letter of Credit (DTIRB-30)
- ALTA 14.3 - 2021 - Future Advance - Reverse Mortgage (DTIRB-42)

**Affected item(s):**

- COMD1017.doc - All Endorsements (Commercial)
- COMD1018.doc - All Mgmt Endorsements (Commercial)
- SSCORPD0792.doc - All Endorsements
- SSCORPD0894.doc - All Mgmt Endorsements

[Back to Table of Contents](#)



FLORIDA

DOCUMENTS

Escrow

<i>Mortgage Deed (Balloon Mortgage)</i>			
<b>New/Mod</b> Change Request	<b>Requested By</b> LCTG	<b>Incident No.</b> INC250064133	<b>TFS No.</b> 856305
Added marital status.			
<b>Affected item(s):</b> FLD1184.doc - Mortgage Deed (Balloon Mortgage)			

[Back to Table of Contents](#)

<i>Smartview Accounting Forms</i>			
New/Mod Mod	Requested By	Incident No.	TFS No.
<p>This release includes:</p> <p>RESOLVED: Memory issue where orders, not open in the UI, have a hook to AutoAccountingForms after Ledger Transfers have been processed.</p>			

[Back to Table of Contents](#)



HAWAII

DOCUMENTS

Phrase(s)

<i>New EI Phrase</i>			
<b>New/Mod</b> New Request	<b>Requested By</b> FT-HI	<b>Incident No.</b>	<b>TFS No.</b> 855315
<p><b>Code: norep01 / ACKNOWLEDGMENT OF NO REPRESENTATION</b></p> <p><b>ACKNOWLEDGMENT OF NO REPRESENTATION:</b> Both parties acknowledge and agree that they are not represented by real estate agents or brokers in this transaction. The Seller and Buyer have independently negotiated the terms of this sale and have chosen to proceed without the assistance of licensed real estate professionals.</p> <p><b>LEGAL ADVICE:</b> Both parties acknowledge that they have been advised to seek independent legal advice regarding this transaction. They understand that proceeding without real estate agents does not preclude them from consulting with attorneys or other professionals as needed.</p>			

[Back to Table of Contents](#)



ILLINOIS

DOCUMENTS

Escrow

<i>Direction to Pay Cook County Taxes (ACH)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	Chicago Metro	INC250047301	854875
Updated processing fee from \$3 to \$2 and added service fee of \$0.50.			
<b>Affected item(s):</b> ILD0292.doc - Direction to Pay Cook County Taxes (ACH)			

[Back to Table of Contents](#)

<i>WireSafe Fraud Alerts (7)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	CT Metro	INC250066578	856407
Added 5 additional Wells Fargo branches.			
<b>Affected item(s):</b> SSCORPD5541.doc - WireSafe Fraud Alert SSCORPD5616.doc - WireSafe Fraud Alert (International) SSCORPD5627.doc - WireSafe Fraud Alert (eSign) SSCORPD5680.doc - WireSafe Fraud Alert (Seller Only) SSCORPD5681.doc - WireSafe Fraud Alert (Lender Only) SSCORPD5702.doc - WireSafe Fraud Alert (Refi-Borrower) SSCORPD5808.doc - WireSafe Fraud Alert (International - esign)			

[Back to Table of Contents](#)



REPORTS

<i>Order Export</i>			
<b>New/Mod</b> Change Request	<b>Requested By</b> CT IL Sales Admin	<b>Incident No.</b>	<b>TFS No.</b> 854546
Added new Report Type 'Revenue-Details W Main Contact Info.' Merging the Revenue format with Revenue-Details columns plus new columns for Main Contact.			
<b>Affected item(s):</b> SSCORP5253.rpt - Order Export			

[Back to Table of Contents](#)



INDIANA

DOCUMENTS

Escrow

<a href="#"><i>ABA (Homebase Title)</i></a>			
<b>New/Mod</b> Change Request	<b>Requested By</b> CT IN	<b>Incident No.</b> INC250063949	<b>TFS No.</b> 856314
Removed rates from first page and added attachment.			
<b>Affected item(s):</b> IND1372.doc - ABA (Homebase Title)			

[Back to Table of Contents](#)

<a href="#"><i>Agreement (Dry Closing)</i></a>			
<b>New/Mod</b> Change Request	<b>Requested By</b> CT IN	<b>Incident No.</b> INC250048538	<b>TFS No.</b> 855405
Added checkbox prompts to choose conditions for dry closing.			
<b>Affected item(s):</b> IND1038.doc - Agreement (Dry Closing)			

[Back to Table of Contents](#)



MAINE

INTEGRATIONS

<i>Deposit Transfer Tool</i>			
New/Mod	Requested By	Incident No.	TFS No.
New			
Installation of Deposit Transfer Tool v4.3.2.3.  Provides commercial escrow users the ability to transfer funds from a single order receiving funds to multiple corresponding orders using the same profile and trust account.			

[Back to Table of Contents](#)

<i>ValueCheck LinkIt</i>			
New/Mod	Requested By	Incident No.	TFS No.
New			
Installation of ValueCheck LinkIt v1.18.0.0.  Provides users the ability to link requirements, exceptions, and legal descriptions through a single step to documents stored in their corresponding Smartview orders.  <b>NOTE:</b> This integration is permission based and may not be enabled for all users.			

[Back to Table of Contents](#)



MARYLAND

INTEGRATIONS

<i>Deposit Transfer Tool</i>			
New/Mod	Requested By	Incident No.	TFS No.
New			
Installation of Deposit Transfer Tool v4.3.2.3.  Provides commercial escrow users the ability to transfer funds from a single order receiving funds to multiple corresponding orders using the same profile and trust account.			

[Back to Table of Contents](#)

<i>ValueCheck LinkIt</i>			
New/Mod	Requested By	Incident No.	TFS No.
New			
Installation of ValueCheck LinkIt v1.18.0.0.  Provides users the ability to link requirements, exceptions, and legal descriptions through a single step to documents stored in their corresponding Smartview orders.  <b>NOTE:</b> This integration is permission based and may not be enabled for all users.			

[Back to Table of Contents](#)



MASSACHUSETTS

INTEGRATIONS

<i>Deposit Transfer Tool</i>			
New/Mod	Requested By	Incident No.	TFS No.
New			
Installation of Deposit Transfer Tool v4.3.2.3.  Provides commercial escrow users the ability to transfer funds from a single order receiving funds to multiple corresponding orders using the same profile and trust account.			

[Back to Table of Contents](#)

<i>ValueCheck LinkIt</i>			
New/Mod	Requested By	Incident No.	TFS No.
New			
Installation of ValueCheck LinkIt v1.18.0.0.  Provides users the ability to link requirements, exceptions, and legal descriptions through a single step to documents stored in their corresponding Smartview orders.  <b>NOTE:</b> This integration is permission based and may not be enabled for all users.			

[Back to Table of Contents](#)

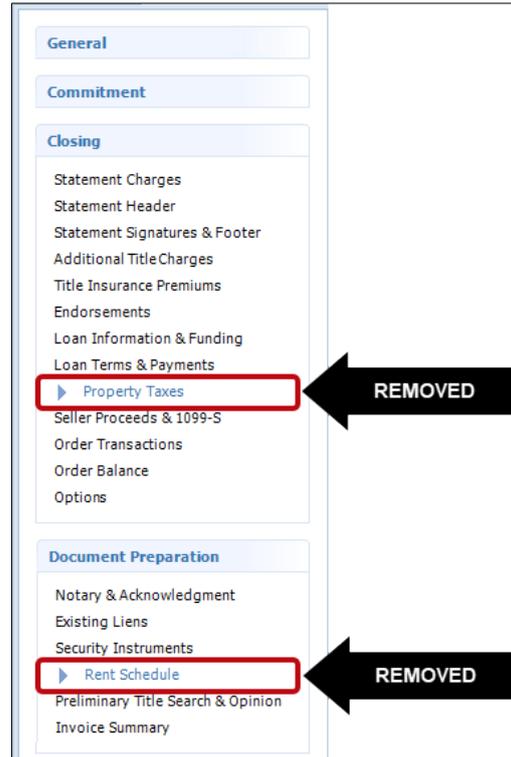
*Various Screens*

<b>New/Mod</b> Mod/New	<b>Requested By</b> Roberta Stone	<b>Incident No.</b>	<b>TFS No.</b>
---------------------------	--------------------------------------	---------------------	----------------

All changes are visible when the **My Screens > MA Agency Screens** is selected.

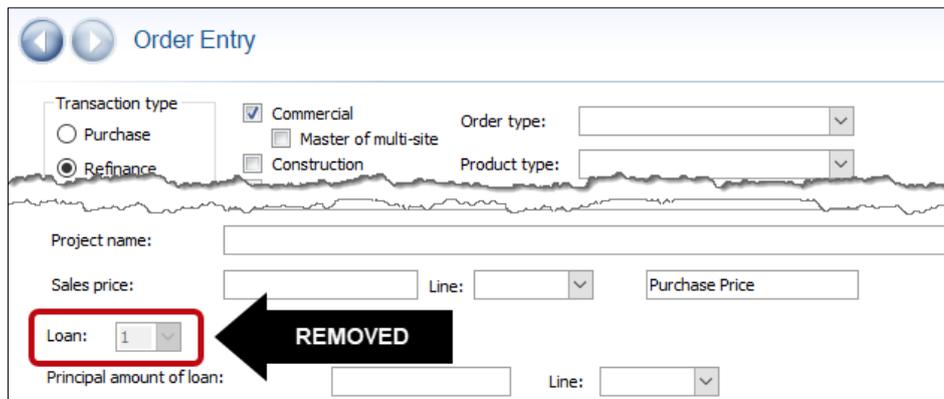
The following screens have been **removed**:

- > **Property Taxes** from **Closing** section
- > **Rent Schedule** from **Document Preparation** section



The following screens had fields added/removed as noted:

- > **Loan** selection drop-down has been removed from the **Order Entry** screen



Various Screens

<b>New/Mod</b> Mod/New	<b>Requested By</b> Roberta Stone	<b>Incident No.</b>	<b>TFS No.</b>
---------------------------	--------------------------------------	---------------------	----------------

- › The following fields have been added to the **Commitment – Schedule A** screen
  - » **Grantor**
  - » **Date Recorded**
  - » **Recording Information**

Commitment - Schedule A

Effective Date: (None)

**Ownership Interest**

B I U abc [icons] ABC

Fee Simple

interest in the land described in this commitment is owned, at the commitment date, by:

B I U abc [icons] ABC

Grantor: [text box]

Date Recorded: (None) Recording Information: [text box]

Requirements shown in this commitment must be met within [text box] after the commitment date.

- › The **Invoice title** field has been added to the **Invoice Summary** screen

Invoice Summary

Corporate/Consolidated invoice sorting – use on screen order

**Invoices (1)**

+	–	Invoice Number	Bill To
		1	

This invoice does not close the order

Invoice title: [text box]

[Back to Table of Contents](#)

MICHIGAN

DOCUMENTS

Escrow

<u>ABAs</u>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	CT MI		856572
New and revised ABAs.			
<b>Affected item(s):</b> MID1231.doc - Master ABA Disclosure			

[Back to Table of Contents](#)

<u>Date Change (5)</u>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	FT MI	INC250075266	857070
Updated for MI users to reflect to the date of closing rather than the system date.			
<b>Affected item(s):</b> SSCORPD0430.doc - FIRPTA - SIRS Cert of Non-Foreign Status (Individual) SSCORPD1895.doc - EI - Disbursement SSCORPD5366.doc - EI - Disbursement (Legal) MID1206.doc - Agreement (Deed Escrow - Commercial) MID1357.doc - Affidavit (Owner's - Commercial)			

[Back to Table of Contents](#)

<u>Indemnity Personal Undertaking ML (2)</u>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	CA		856604
Updated signatures to pull the person signing on behalf of an entity as an individual as well as signing for the entity itself.			
<b>Affected item(s):</b> SSCORPD5717.doc - Indemnity Personal Undertaking ML Contractor Form Limited 2024 SSCORPD5780.doc - Indemnity Personal Undertaking ML Exceptions 2024			

[Back to Table of Contents](#)

<u>Record Title Search and Title Search Update</u>			
New/Mod	Requested By	Incident No.	TFS No.
New Request	FT MI		857210
Record Title Search has been reinstated. Title Search Update has been added and revised to pull from the policy exceptions.			
This will be in the same tree folders as the Record Title Search.			
<b>Affected item(s):</b> MID1218.doc - Record Title Search MID1376.doc - Title Search Update			

[Back to Table of Contents](#)



MISSOURI

DOCUMENTS

Escrow

<i>Affidavit (Notary)</i>			
New/Mod	Requested By	Incident No.	TFS No.
New Request	St. Louis Title	INC250069494	856466
New document. Please render to view.			
This will be in the following tree folders: 1 - St. Louis Title>MO Docs>Closing-Seller.			
<b>Affected item(s):</b> MOD1266.doc - Affidavit (Notary)			

[Back to Table of Contents](#)

<i>Authorization and Direction of Funds</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	St. Louis Title	INC250074250	857213
For St. Louis Title, document will pull the T2 contact in the first paragraph instead of prompting.			
<b>Affected item(s):</b> MOD1230.doc - Authorization and Direction of Funds			

[Back to Table of Contents](#)

<i>Certification of Trust - Generic</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	St. Louis Title	INC250048646	855299
Added an additional blank signature and notary block.			
<b>Affected item(s):</b> MOD1247.doc - Certification of Trust - Generic			

[Back to Table of Contents](#)

<i>Certification of Trust - Generic</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	State Counsel	INC250073459	857056
Date line will render blank lines rather than the system date.			
<b>Affected item(s):</b> MOD1247.doc - Certification of Trust - Generic			

[Back to Table of Contents](#)

<i>Durable Power of Attorney</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	MO State Counsel	INC250062784	856151
Language updated per State Counsel. Please render to view.			
<b>Affected item(s):</b> MOD1126.doc - Durable Power of Attorney			

[Back to Table of Contents](#)



## RELEASE NOTES

MARCH 2025

### Stop Payment Request

New/Mod	Requested By	Incident No.	TFS No.
Change Request	St. Louis Title	INC250051042	855308
Added signature.			
<b>Affected item(s):</b> MOD1142.doc - Stop Payment Request			

[Back to Table of Contents](#)

### WireSafe Fraud Alerts (2)

New/Mod	Requested By	Incident No.	TFS No.
Change Request	St. Louis Title	INC250076974	857058
St. Louis operations only will now get 2 pages for these forms.			
<b>Affected item(s):</b> SSCORPD5541.doc - WireSafe Fraud Alert SSCORPD5627.doc - WireSafe Fraud Alert (eSign)			

[Back to Table of Contents](#)



NEBRASKA

DOCUMENTS

Title

<a href="#"><i>SE 554 - Maximum Actual Loss (KS, MO, NE)</i></a>			
<b>New/Mod</b> New Request	<b>Requested By</b> Form Filing	<b>Incident No.</b>	<b>TFS No.</b> 855844
A new SE 554 "Maximum Actual Loss (KS, MO, NE)" endorsement is now available for issuance on properties in the state of Nebraska.			
<b>NOTE:</b> This is currently filed only for the state of Nebraska. Once this endorsement is filed in Kansas and Missouri, it will be made available for issuance in those states.			

[Back to Table of Contents](#)



NEVADA

DOCUMENTS

Escrow

<i>Disclosure Related to Escrowed Funds</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	Corporate Counsel	INC250044411	855392
<p>Removed the opt out language that was available for Nevada users. Nevada regulations state funds must be handled in accordance with written instructions, therefore, at this time, some type of signature is needed (electronic or inked) to the form before the company can deposit funds into an IBA.</p> <p><b>Affected item(s):</b> SSCORPD5928.doc - Disclosure Related to Escrowed Funds</p>			

[Back to Table of Contents](#)

<i>Grant Bargain and Sale Deed with DOV (Nevada)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	CA State Counsel		855293
<p>Removed water rights language.</p> <p><b>Affected item(s):</b> SCA0002455.doc - Grant Bargain and Sale Deed with DOV (Nevada)</p>			

[Back to Table of Contents](#)

<i>Solar Acknowledgment</i>			
New/Mod	Requested By	Incident No.	TFS No.
New Request	LT Las Vegas		855290
<p>New document. Please render to view.</p> <p>This will be located in the "Instructions" tree folder.</p> <p><b>Affected item(s):</b> NVD1479.doc - Solar Acknowledgment</p>			

[Back to Table of Contents](#)



REPORTS

<i>Opened/Closed Orders</i>			
<b>New/Mod</b> Change Request	<b>Requested By</b> TT Reno Admin	<b>Incident No.</b>	<b>TFS No.</b> 855702
For TT Reno profiles, if the report is grouped by 'Sales Rep' include Bill Codes TP & END only, and if grouped by 'No Group' include bill codes TP & ESC only.			
<b>Affected item(s):</b> SSCORP5231.rpt - Opened/Closed Orders			

[Back to Table of Contents](#)

<i>Title Product Exceptions</i>			
<b>New/Mod</b> Change Request	<b>Requested By</b> FNFi Rpts Team Admin	<b>Incident No.</b>	<b>TFS No.</b> 854577
Updated to EXCLUDE orders with owning profile starting with "Default\PAZ\CPF – Las Vegas\NVSTEP - Nevada" that have a product type of "Preliminary Report" or "Modification Loan/Note".			
<b>Affected item(s):</b> SSCORP5296.rpt - Title Product Exceptions			

[Back to Table of Contents](#)



NEW YORK

DOCUMENTS

Escrow

<i>Bankruptcy Search (Syracuse)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	CT Syracuse	INC250074312	857051
Various changes, please render to view.			
<b>Affected item(s):</b> NYD1093.doc - Bankruptcy Search (Syracuse)			

[Back to Table of Contents](#)

<i>Endorsement Request Form</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	CT Syracuse		856308
Document removed from system.			
<b>Affected item(s):</b> NYD1025.doc - Endorsement Request Form			

[Back to Table of Contents](#)



Title

<i>Master Commitment (NNY)</i>			
<b>New/Mod</b> Change Request	<b>Requested By</b> NY Utica	<b>Incident No.</b>	<b>TFS No.</b> 856178
The jacket/cover page of the Master Commitment (NNY) document has been modified to reflect the applicable Underwriter name reference after "Issued by:" when Leatherstocking Abstract is selected as the Title Office (with Lookup Code of UTI-[xxxx]).			
<b>Affected item(s):</b> NYD1149.doc - Master Commitment (NNY)			

[Back to Table of Contents](#)



NORTH CAROLINA

INTEGRATIONS

<i>Deposit Transfer Tool</i>			
New/Mod	Requested By	Incident No.	TFS No.
New			
Installation of Deposit Transfer Tool v4.3.2.3.  Provides commercial escrow users the ability to transfer funds from a single order receiving funds to multiple corresponding orders using the same profile and trust account.			

[Back to Table of Contents](#)

<i>ValueCheck LinkIt</i>			
New/Mod	Requested By	Incident No.	TFS No.
New			
Installation of ValueCheck LinkIt v1.18.0.0.  Provides users the ability to link requirements, exceptions, and legal descriptions through a single step to documents stored in their corresponding Smartview orders.  <b>NOTE:</b> This integration is permission based and may not be enabled for all users.			

[Back to Table of Contents](#)



REPORTS

*Order Count and Revenue by Attorney Payee Code*

<b>New/Mod</b> New Request	<b>Requested By</b> FT NC Admin	<b>Incident No.</b>	<b>TFS No.</b> 854289
New report for FNT NC.			
<b>Affected item(s):</b> SSCORP5616.rpt - Order Count and Revenue by Attorney Payee Code			

[Back to Table of Contents](#)



OHIO

DOCUMENTS

Escrow

<a href="#">Add eSign to Tree Titles (15)</a>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	OH		857100
Added "eSign" to tree titles.			
<p><b>Affected item(s):</b>            OHD1206.doc - Escrow Acceptance (Legal)            OHD1234.doc - ALTA 2021 vs. ALTA Homeowners (Rev. 09-01-14)            OHD1277.doc - Letter (Introduction - Buyer)            OHD1278.doc - Letter (Introduction - Seller)            OHD1296.doc - Required Information Sheet (Legal)            OHD1307.doc - Closing Protection Notice (CP-24.1)            OHD1325.doc - Why Title Insurance            OHD1393.doc - Agreement for Performance of Settlement Services            OHD1435.doc - Required Information Sheet            OHD1460.doc - ACT ABA OH            OHD1470.doc - Columbus-AT Letter (Introduction - Buyer)            OHD1470.doc - Columbus-AT Letter (Introduction - Seller)            OHD1472.doc - South Letter (Introduction - Buyer)            OHD1472.doc - South Letter (Introduction - Seller)            OHD1482.doc - ABA OH CT TriCity</p>			

[Back to Table of Contents](#)

<a href="#">New Order Sheet</a>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	FT NCS GL	INC250064433	856253
Various updates for Great Lakes profiles, please render to view.			
<p><b>Affected item(s):</b>            OHD1112.doc - New Order Sheet</p>			

[Back to Table of Contents](#)



OREGON

DOCUMENTS

Escrow

<i>Construction Disbursement Agreement</i>			
New/Mod	Requested By	Incident No.	TFS No.
New Request	Western Title		856868
New document. Please render to view.			
<b>Affected item(s):</b> ORD1538.doc - Construction Disbursement Agreement			

[Back to Table of Contents](#)

<i>Els (2)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	Escrow Admin		856530
Various changes, please render to view.			
<b>Affected item(s):</b> ORD1031.doc - EI - Preparation of Bargain and Sale Deed ORD1032.doc - EI - Preparation of Subordination Agreement			

[Back to Table of Contents](#)

<i>Instructions (Preparation of Deed)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	Escrow Admin		856528
Various changes, please render to view.			
<b>Affected item(s):</b> ORD1107.doc - Instructions (Preparation of Deed)			

[Back to Table of Contents](#)

<i>Instructions (Prepare Note and Trust Deed)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	WT Bend		856485
Various changes, please render to view.			
<b>Affected item(s):</b> ORD1075.doc - Instructions (Prepare Note and Trust Deed)			

[Back to Table of Contents](#)

<i>Instructions (Prepare Unsecured Note)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	Escrow Admin		856526
Various changes, please render to view.			
<b>Affected item(s):</b> ORD1076.doc - Instructions (Prepare Unsecured Note)			

[Back to Table of Contents](#)



PENNSYLVANIA

INTEGRATIONS

<i>Deposit Transfer Tool</i>			
New/Mod	Requested By	Incident No.	TFS No.
New			
Installation of Deposit Transfer Tool v4.3.2.3.  Provides commercial escrow users the ability to transfer funds from a single order receiving funds to multiple corresponding orders using the same profile and trust account.			

[Back to Table of Contents](#)

<i>ValueCheck LinkIt</i>			
New/Mod	Requested By	Incident No.	TFS No.
New			
Installation of ValueCheck LinkIt v1.18.0.0.  Provides users the ability to link requirements, exceptions, and legal descriptions through a single step to documents stored in their corresponding Smartview orders.  <b>NOTE:</b> This integration is permission based and may not be enabled for all users.			

[Back to Table of Contents](#)



SOUTH CAROLINA

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>Provides commercial escrow users the ability to transfer funds from a single order receiving funds to multiple corresponding orders using the same profile and trust account.</p>			

[Back to Table of Contents](#)

<i>ValueCheck LinkIt</i>			
New/Mod	Requested By	Incident No.	TFS No.
New			
<p>Installation of ValueCheck LinkIt v1.18.0.0.</p> <p>Provides users the ability to link requirements, exceptions, and legal descriptions through a single step to documents stored in their corresponding Smartview orders.</p> <p><b>NOTE:</b> This integration is permission based and may not be enabled for all users.</p>			

[Back to Table of Contents](#)



TEXAS

DOCUMENTS

Escrow

<a href="#"><i>Affiliated Business Arrangements (2)</i></a>			
<b>New/Mod</b>	<b>Requested By</b>	<b>Incident No.</b>	<b>TFS No.</b>
Change Request	CT San Antonio		855394
Added new custom field prompt for CT San Antonio users. Please render to view.			
<b>Affected item(s):</b> SSCORPD5927.doc - Affiliated Business Arrangement Disclosure Statement SSCORPD5945.doc - Affiliated Business Arrangement Disclosure Statement (esign)			

[Back to Table of Contents](#)



UTAH

DOCUMENTS

Escrow

[Letter \(Seller Financing Payment\)](#)

New/Mod	Requested By	Incident No.	TFS No.
New Request	FNT UT	INC250056495	855629
New document. Please render to view.			
This will be located in the 1-Utah Documents Tree, Folder: All Inclusive/Seller Financing.			
<b>Affected item(s):</b> UTD1140.doc - Letter (Seller Financing Payment)			

[Back to Table of Contents](#)



VIRGINIA

INTEGRATIONS

<i>Deposit Transfer Tool</i>			
New/Mod	Requested By	Incident No.	TFS No.
New			
Installation of Deposit Transfer Tool v4.3.2.3.  Provides commercial escrow users the ability to transfer funds from a single order receiving funds to multiple corresponding orders using the same profile and trust account.			

[Back to Table of Contents](#)

<i>ValueCheck LinkIt</i>			
New/Mod	Requested By	Incident No.	TFS No.
New			
Installation of ValueCheck LinkIt v1.18.0.0.  Provides users the ability to link requirements, exceptions, and legal descriptions through a single step to documents stored in their corresponding Smartview orders.  <b>NOTE:</b> This integration is permission based and may not be enabled for all users.			

[Back to Table of Contents](#)



WASHINGTON

DOCUMENTS

Escrow

<i>Dedication for Subdivision Platting</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	CT Vancouver		854878
Removed the "Return to" section in the upper left.			
<b>Affected item(s):</b> WA00000847.doc - Dedication for Subdivision Platting			

[Back to Table of Contents](#)

<i>Power of Attorney POA Instructions</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	CT Seattle		855296
Updated to allow user to pull from other contacts in the file.			
<b>Affected item(s):</b> SSCORPD2036.doc - Power of Attorney POA Instructions			

[Back to Table of Contents](#)



WEST VIRGINIA

INTEGRATIONS

<i>Deposit Transfer Tool</i>			
New/Mod	Requested By	Incident No.	TFS No.
New			
Installation of Deposit Transfer Tool v4.3.2.3.  Provides commercial escrow users the ability to transfer funds from a single order receiving funds to multiple corresponding orders using the same profile and trust account.			

[Back to Table of Contents](#)

<i>ValueCheck LinkIt</i>			
New/Mod	Requested By	Incident No.	TFS No.
New			
Installation of ValueCheck LinkIt v1.18.0.0.  Provides users the ability to link requirements, exceptions, and legal descriptions through a single step to documents stored in their corresponding Smartview orders.  <b>NOTE:</b> This integration is permission based and may not be enabled for all users.			

[Back to Table of Contents](#)



LIBERTY TITLE

REPORTS

<i>MMP Orders</i>			
<b>New/Mod</b> New Request	<b>Requested By</b> Lib Title Admin	<b>Incident No.</b>	<b>TFS No.</b> 855645
New Report for Liberty Title to track MMP orders.			
<b>Affected item(s):</b> SSCORP5617.rpt - MMP orders			

[Back to Table of Contents](#)

<i>Title Grading</i>			
<b>New/Mod</b> Change Request	<b>Requested By</b> Lib Admin	<b>Incident No.</b>	<b>TFS No.</b> 853485
Reverted to grab all orders opened in the date range, whether there are curative tasks present or not.			
<b>Affected item(s):</b> SSCORP5613.rpt - Title Grading			

[Back to Table of Contents](#)



NCS

DOCUMENTS

Escrow

[\*Payment Transmittal form by Property \(4\)\*](#)

New/Mod	Requested By	Incident No.	TFS No.
New Request	CT NY NCS		857131

These are new versions that are designed to isolate the fees to only a particular property.

**Affected item(s):**

- COMD1317.doc - Payment Transmittal Form by Property (Branch) (Split Sheet)
- COMD1318.doc - Payment Transmittal Form by Property (Agency) (Split Sheet)
- COMD1319.doc - Payment Transmittal Form (Branch) by Property - Prompts (Split Sheet)
- COMD1320.doc - Payment Transmittal Form (Agency) by Property - Prompts (Split Sheet)

[Back to Table of Contents](#)

*Property Screen*

<b>New/Mod</b> Mod	<b>Requested By</b> Sally Smith	<b>Incident No.</b>	<b>TFS No.</b>
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The **Property** screen has been updated to include the following:

- > **Check to exclude Parcel and/or Tax ID from legal description** check box
- > **Custom Fields** more/less section

This change is visible when the **My Screens > GL Commercial CSS Screen** is selected.

The screenshot shows the 'Property' screen interface. At the top, there are navigation buttons and status information: 'Order Status: InProcess', 'Buyers:', 'Sellers:', and 'Transaction Type: Refinance'. Below this is a 'Properties (1)' section with a table containing one row with columns for Property Address, Site Number/Name, City/State/Zip, Lot(s), Subdivision, and Brief Legal. Below the table, there is a checkbox labeled 'Check to exclude Parcel and/or Tax ID from legal description' which is highlighted with a red box. Underneath are input fields for Lot number(s), Block, Section, and Phase. A 'Manufactured Housing' section is partially visible. At the bottom, the 'Custom Fields' section is expanded and highlighted with a red box, showing a search bar and a table with columns for Label and Value. The table contains several rows of custom fields such as 'Enter the recorded date of document recorded', 'Water district name', 'Enter recording information for recorded document', 'Tax rate per \$100', 'Subdivision Note', 'Tax projected rate per \$100', and 'Total amount of bonds approved'.

[Back to Table of Contents](#)



REPORTS

<a href="#"><i>CO SoftPro Summary</i></a>			
<b>New/Mod</b> Change Request	<b>Requested By</b> Config Team	<b>Incident No.</b>	<b>TFS No.</b> 855469
Added "Commercial Format" checkbox. When checked the report will show additional columns for EO 1 and 2 percentages.			
<b>NOTE:</b> Percentages for EO and EO 2 will be user entered in custom fields. The report will not calculate them.			
<b>Affected item(s):</b> SSCORP5433.rpt - CO SoftPro Summary			

[Back to Table of Contents](#)

<a href="#"><i>Invoice Statement</i></a>			
<b>New/Mod</b> New Request	<b>Requested By</b> CLT NY NCS	<b>Incident No.</b>	<b>TFS No.</b> 856462
New Invoice Statement for CLT NY NCS.			
<b>Affected item(s):</b> NYD5998.spdoc - Invoice Statement			

[Back to Table of Contents](#)

<a href="#"><i>Loan Statement</i></a>			
<b>New/Mod</b> New Request	<b>Requested By</b> CLT / CT NY NCS	<b>Incident No.</b>	<b>TFS No.</b> 855693
Adding new version of "Buyer/Borrower Statement (CSS)" as Loan Statement (CSS) - Buyer/Loan Sections version. It will pull in any section starting with "Loan - ", "Buyer - " or "All - ".			
<b>NOTE:</b> The dash (-) must be included after the Loan, Buyer or All section names. The statement title will default to "Loan Statement" but can be changed on the prompt screen when running the document. Buyer signature acknowledgment text can be added using "Loan statement acknowledgment text" custom field on the order context.			
<b>Affected item(s):</b> SSCORPD3007.spdoc - Buyer/Borrower Statement (CSS)			

[Back to Table of Contents](#)

<a href="#"><i>NY Application</i></a>			
<b>New/Mod</b> Change Request	<b>Requested By</b> CT/CLT/FT NY NCS	<b>Incident No.</b>	<b>TFS No.</b> 855882
Included miscellaneous updates for NY NCS ops.			
<b>Affected item(s):</b> NYD1030.spdoc - NY Application			

[Back to Table of Contents](#)



## RELEASE NOTES

## MARCH 2025

### Order Exceptions

New/Mod	Requested By	Incident No.	TFS No.
Change Request	Config		855517

Added exception "Payee Mismatch" if the payee behind the line does not match the payee in the "To" section (CSS).

**Affected item(s):**

SSCORP5160.rpt - Order Exceptions

[Back to Table of Contents](#)

### Transaction Form

New/Mod	Requested By	Incident No.	TFS No.
Change Request	FNT AZ NCS Admin		855564

Updated for FNT AZ to show the Transaction Date instead of the Trust Accounting Date for the Incoming Wire Form.

**Affected item(s):**

SSCORP5002.rpt - Transaction Form

[Back to Table of Contents](#)

### Transaction Form

New/Mod	Requested By	Incident No.	TFS No.
Change Request	NCS CA		845213

Updated to show Extended Memo data for G contacts only, for NCS Southwest operations.

**Affected item(s):**

SSCORP5002.rpt - Transaction Form

[Back to Table of Contents](#)