

SOFTPRO SELECT

April 2025

RELEASE NOTES



Testing Release Date: April 4, 2025
Production Release Date: April 14, 2025



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ALL STATES/SITES

DOCUMENTS

Escrow

<i>Affiliated Business Arrangement Disclosure</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	Merrisha Herndon CT		860803
Replace hardcoded signature lines with signatures from contact for all CA operations.			
Affected item(s): SSCORPD5927.doc - Affiliated Business Arrangement Disclosure Statement			

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<i>Assignee Instructions</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	FNF Corporate		857637
Updated to add prompt to control whether or not to show the 1099-M paragraph "ASSIGNOR ACKNOWLEDGES....THERE WILL BE A 1099 MISC FILED...".			
Affected item(s): SSCORPD5527.doc - Assignee Instructions SSCORPD5938.doc - Assignee Instructions			

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<i>Third Party Deposit Language (5)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	Settlement		860144
Updated language on documents to reflect: I hand you herewith, or I will be depositing , my check... I have wired, or will wire , \$ _____ to your... Also, for FWAC profiles in CA, "...along with any subsequent funds from the undersigned..." has been added to the first paragraph of EI - Third Party Deposit (both letter and legal versions).			
Affected item(s): SSCORPD1840.doc - EI - Third Party Deposit SSCORPD1840.doc - EI Third Party Deposit SSCORPD5367.doc - EI - Third Party Deposit (Legal) SSCORPD5367.doc - EI Third Party Deposit (Legal) SSCORPD5448.doc - EI - Third Party Deposit - Multiple Parties SSCORPD5448.doc - EI Third Party Deposit - Multiple Parties SSCORPD5451.doc - EI - Third Party Deposit - Multiple Parties (Legal) SSCORPD5451.doc - EI Third Party Deposit - Multiple Parties (Legal) SSCORPD5962.doc - Wire Account Notification with Third Party Depositor (NCS - Commercial)			

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Title

<i>ALTA Commitment 2021</i>			
New/Mod Change Request	Requested By Various	Incident No.	TFS No. 860497
The 2021 Commitment documents have been updated to suppress PROFORMA from printing on Schedule A, item 2, under "Policy to be issued:" for the Amount of Insurance of the policies.			

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INTEGRATIONS

<i>SAFe Audit (Lakehouse)</i>			
New/Mod New	Requested By	Incident No.	TFS No.
<p>**ALL STATES (EXCEPT AL/ CT/ HI/ MA/ ME/ MD/ NC/ PA/ SC/ VA/ WVA)</p> <p>Installation of SAFeAudit (Lakehouse) v1.5.3.0.</p> <p>The integration provides the ability to send available data seamlessly from SoftPro Select when changes occur in the Select order, trust account, ledger, or transactions to FNF Azure Lakehouse for use in auditing, customer insights, fraud prevention, etc.</p>			

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REPORTS

<i>1099-S Exceptions by Branch, Escrow Officer/Closer</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	Reports Team		856332
Updated name for parameter "Show Seller Notes" to "Show Notes in Seller Contact," to make it easier to identify the note location.			
Affected item(s): SSCORP0001.rpt - 1099-S Exceptions by Branch, Escrow Officer/Closer			

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<i>Customer Report Card (NOV)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Fix	Reports Team		855983
Corrected typo in header (Refiance instead of Refinance).			
Affected item(s): SSCORP5452.rpt - Customer Report Card (NOV)			

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<i>Escrow Trial Balance</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	FNT LA OAC		856055
Added "Commercial / Residential filter dropdown parameter.			
Affected item(s): SSCORP0003.rpt - Escrow Trial Balance			

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<i>Funds Flow Summary</i>			
New/Mod	Requested By	Incident No.	TFS No.
Fix	Mid-Atl Comm Counsel		858367
Corrected the header sub-title, when Pending transactions are selected it was showing as "Posted Only".			
Affected item(s): SSCORPD5863.spdoc - Funds Flow Summary			

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<i>Opened/Closed Orders by {Selection}</i>			
New/Mod	Requested By	Incident No.	TFS No.
Troubleshooting	Addie Hunter		858610
Updated Programming Notes for greater clarification on how Title Revenue, Endorsement Revenue and Total Revenue are affected by selecting any of the 'Sales Rep....' groupings.			
Affected item(s): SSCORP5154.rpt - Opened/Closed Orders by {Selection}			

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<i>Opened/Closed Orders by {Selection}</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	CT IL Admin		855988
Added Project Name column at the end of the Excel Export.			
Affected item(s): SSCORP5154.rpt - Opened/Closed Orders by {Selection}			

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<i>Order Log</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	NCS NY Ops		859382
Updatead as follows:			
<ol style="list-style-type: none"> 1. Added additional options to the 'Format for Excel export:' parameter. Modified how the way the 'Format for Excel export:' and 'Commercial format:' parameters function. 2. Added "Daily Calendar" Excel export for CT NY NCS. 			
Affected item(s): SSCORP5091.rpt - Order Log			

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<i>Order Tasks by Order Date</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	Escrow Connect Admin		858856
Added Excel Option "Excel-Escrow Connect" with some existing columns and 3 new ones.			
Affected item(s): SSCORP5475.rpt - Order Tasks by Order Date			

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<i>Order Tasks by Task Dates</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	Escrow Connect Admin		858859
Added Excel Option "Excel-Escrow Connect" with some existing columns and 3 new ones.			
Affected item(s): SSCORP5474.rpt - Order Tasks by Task Dates			

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<i>Orders By Contact</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	PacNW IT		856348
Added a "Participants-Ext-Excel Only" option and a new dropdown parameter to be able to include or exclude Marketing Source Contacts.			
Affected item(s): SSCORP5280.rpt - Orders By Contact			

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Orders by Current Profile

New/Mod	Requested By	Incident No.	TFS No.
Change Request	Reports Team - PacNW IT		856072

Added asterisk and footer note to indicate if a file is Commercial.

Affected item(s):

SSCORP5034.rpt - Orders by Current Profile

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Transaction Form

New/Mod	Requested By	Incident No.	TFS No.
Troubleshooting	PacNW IT		860400

Fixed the Escrow Holder verbiage that was getting cut off at the end, with some transactions.

Affected item(s):

SSCORP5002.rpt - Transaction Form

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ARIZONA

DOCUMENTS

Escrow

<i>Deed of Trust Assignment of Rents</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	CT AZ	INC250092286	858467
Item 19 is now optional and if chosen to show on document, there will be a prompt for the years.			
Affected item(s): AZD1172.doc - Deed of Trust Assignment of Rents			

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<i>EPU doc requests</i>			
New/Mod	Requested By	Incident No.	TFS No.
New Request	AZ EPU	INC250127814	860507
Created EPU versions, please render to view.			
Affected item(s): AZD1313.doc - Letter (HOA Information Request - EPU) AZD1317.doc - Assessment (City)			

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<i>Letter (Critical Dates - Review)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	FT AZ		858668
If there is no EMD or the EMD is \$0.00, the paragraph beginning with "In connection with the above referenced transaction..." will be suppressed.			
Affected item(s): AZD1277.doc - Letter (Critical Dates - Review)			

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<i>Notice of Completion - Fulton</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	FT Phoenix	INC250096633	859383
New document, please render to view.			
This will be placed in the Fidelity Phoenix Documents>Escrow.			
Affected item(s): AZD1481.doc - Notice of Completion - Fulton			

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<i>Trust Certification (Blank)</i>			
New/Mod	Requested By	Incident No.	TFS No.
New Request	FT Arizona		860563
New document, please render to view.			
Affected item(s): AZD1470.doc - Trust Certification (Blank)			

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CALIFORNIA

DOCUMENTS

Escrow

<i>Affidavit (Death of Trustee) (4)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	CA	INC250075789	857652
Updated prompt and language in paragraph #2.			
Affected item(s): SCA0000017.doc - Affidavit (Death of Trustee) SCA0002647.doc - Affidavit (Death of Trustee) with PCOR SCA0002827.doc - Affidavit (Death of Trustee) Generic SCA0002828.doc - Affidavit (Death of Trustee) Generic with PCOR			

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<i>Assignment of Funds</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	LT CA	INC250074750	857657
Added prompt for net proceeds being remitted to allow for the words "NET PROCEEDS" to render to the form.			
Affected item(s): SSCORPD5384.doc - Assignment of Funds			

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<i>Confirmation of Time Periods</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	Santa Barbara	INC240441155	860188
Added an additional prompt for a contingency removal date.			
Affected item(s): SCA0002882.doc - Confirmation of Time Periods			

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<i>Credit Line-Equity Line Freeze-Payoff Authorization to Escrow</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	CT CA	INC250121204	860225
Updated language, please render to view.			
Affected item(s): SCA0000108.doc - Credit Line-Equity Line Freeze-Payoff Authorization to Escrow			

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[EI Assignment of Interest Instructions](#)

New/Mod	Requested By	Incident No.	TFS No.
Change Request	FNF Corporate		857643
Updated to add prompt to control whether or not to show the 1099-M paragraph "ASSIGNOR ACKNOWLEDGES....THERE WILL BE A 1099 MISC FILED...".			
Affected item(s): SCA0000033.doc - EI Assignment of Interest Instructions			

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[EI Commercial Sale \(EIS\)](#)

New/Mod	Requested By	Incident No.	TFS No.
Change Request	CT Alameda		859680
Updated language per request for "362 Lafayette" profiles, please render to view.			
Affected item(s): SCA0000315.doc - EI Commercial Sale (EIS)			

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[HOA Demand Request](#)

New/Mod	Requested By	Incident No.	TFS No.
Change Request	CTC CA	INC250109686	859683
2nd page RE section will always pull the HOA name regardless of the contact chosen at rendering.			
Affected item(s): SCA0000137.doc - HOA Demand Request			

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[Memorandum of Termination of Occupancy Agreement](#)

New/Mod	Requested By	Incident No.	TFS No.
Change Request	Laguna Hills		858089
Updated to render for sellers instead of buyers.			
Affected item(s): SCA0003234.doc - Memorandum of Termination of Occupancy Agreement			

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[SCA0000064 - EI CAR Amendment \(EIS\)](#)

New/Mod	Requested By	Incident No.	TFS No.
Change Request	Settlement		860105
Language updated to "If we issue a check at close of escrow:"			
Affected item(s): SCA0000064.doc - EI CAR Amendment (EIS)			

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[SCA0000106.doc - EI Sale \(EIS\)](#)

New/Mod	Requested By	Incident No.	TFS No.
Change Request	Settlement		859929
Adding Escrow Office name to opening paragraph to establish "Escrow Holder" please render document in full.			
Affected item(s): SCA0000106.doc - EI Sale (EIS)			

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[Third Party Deposit Language \(2\)](#)

New/Mod	Requested By	Incident No.	TFS No.
Change Request	Settlement		860158
Updated language on documents to reflect: I hand you herewith, or I will be depositing , my check... I have wired, or will wire , \$_____ to your...			
Affected item(s): SCA0002989.doc - EI Third Party Deposit - Lender Funding SCA0003252.doc - EI Third Party Return Money to Depositor			

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[WireSafe Fraud Alerts \(7\)](#)

New/Mod	Requested By	Incident No.	TFS No.
Change Request	CT SoCal	INC250109907	859948
Created a prompt that asks for an amount to be wired (if any known) and if the users leave it blank then the document will not change, if they enter the amount then it will pull to the form next to the bank name with the label AMOUNT TO BE WIRED \$_____.			
Affected item(s): 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)			

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Escrow/Title

<i>CLTI NCS Doc Requests</i>			
New/Mod Change Request	Requested By CLTI CA NCS	Incident No.	TFS No. 860396
Added Assignee and Seller signatures.			
Affected item(s): SCA0002864.doc - Assignment of Buyer			

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File Details Screens

New/Mod Mod	Requested By Justin Martin	Incident No.	TFS No.
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The File Details screen has been updated to include the Number of days file is open field.

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

- > SoCal EPRO Screens LT
- > SoCal Escrow Screens LT
- > SoCal Title Screens LT

⏪ ⏩ File Details *Informational Only DO NOT EDIT SCREEN*

File Information

File #:	<input type="text"/>	Escrow Officer:	<input type="text"/>	Sales Price:	<input type="text"/>
Opening Date:	<input type="text"/>	Status:	<input type="text"/>	Loan Amount:	<input type="text"/>
Settlement Date:	<input type="text"/>	Type:	<input type="text"/>	Number of days file is open:	<input type="text"/>
Property:	<input type="text"/>				

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REPORTS

<i>Data Download</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	FNT SD Admin		856241
Updated as follows:			
<ol style="list-style-type: none"> 1. Changed the L3 fields to pull from the 'M' contact 2. Relabeled L3 headers to 'Mortgage Broker' 			
Affected item(s):			
SSCORP5577.rpt - Data Download			

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<i>Settlement Statements (HUD & CDF)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	Boutique Escrow Ops		859366
Updated to show the SA Payee's Nickname or Short name depending on the profile for the Boutique Escrows			
Affected item(s):			
SSCORPD1823.rpt - Individual Settlement Statement, Legal			
SSCORPD1824.rpt - Individual Settlement Statement, Letter			
SSCORPD5460.rpt - Individual Settlement Statement, Legal (CDF)			
SSCORPD5461.rpt - Individual Settlement Statement, Letter (CDF)			

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COLORADO

DOCUMENTS

Escrow

<i>International Wire Out Supplement</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	CO OAC		860585
Updated to reflect the reason for funds sent for international wires.			
Affected item(s): COD1136.doc - International Wire Out Supplement			

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<i>Letter (Unable to Issue Policy - Title)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	FNT CO	INC250084466	857969
Updated 120 days to 90 days.			
Affected item(s): COD1012.doc - Letter (Unable to Issue Policy - Title)			

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<i>Power of Attorney (3)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	Heritage Title	INC250114257	859670
Added (POA) to the tree titles for easy access.			
Affected item(s): COD1186.doc - Power of Attorney - Buyer (POA) COD1223.doc - Power of Attorney - Seller (POA) COD1277.doc - Power of Attorney - Refinance (POA)			

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GEORGIA

DOCUMENTS

Title

<i>ALTA 14.1 - Future Advance - Knowledge 2021</i> <i>ALTA 14.1-06 - Future Advance - Knowledge</i>			
New/Mod Change Request	Requested By GA Counsel	Incident No.	TFS No. 859649
At the direction of Georgia State Counsel, the ALTA 14.1[and -06] - Future Advance - Knowledge endorsement has been removed from availability, as this is not applicable in the state of Georgia.			

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HAWAII

DOCUMENTS

Escrow

<i>Form Contractor Indemnity Agreements (2)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	TG HI		857660
Forms have been modified with revised signature blocks, an update to our title company address as well as an additional provision.			
Affected item(s): HID1356.doc - Form Contractor Indemnity Agreement Full Release HID1355.doc - Form Contractor Indemnity Agreement Subordination			

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<i>Form N-848</i>			
New/Mod	Requested By	Incident No.	TFS No.
New Request	FT HI		860186
New document, please render to view.			
Affected item(s): HID1449.doc - Form N-848			

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<i>Form Owner or Developer Indemnity Agreement</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	TG HI		857663
Forms have been modified with revised signature blocks, an update to our title company address as well as an additional provision.			
Affected item(s): HID1358.doc - Form Owner or Developer Indemnity Agreement			

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ILLINOIS

DOCUMENTS

Escrow

<i>Assignee Instructions</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	FNF Corporate		857641
Updated to add prompt to control whether or not to show the 1099-M paragraph "ASSIGNOR ACKNOWLEDGES....THERE WILL BE A 1099 MISC FILED...".			
Affected item(s): ILD0187.doc - Assignee Instructions			

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<i>O'Hare Title Disclosure Form</i>			
New/Mod	Requested By	Incident No.	TFS No.
New Request	CT IL	INC250075990	857967
New document, please render to view.			
Document will be placed in the following tree: 1-FNF Illinois CT Metro Documents Package (2/26/15)>Title>Commitment			
Affected item(s): ILD0624.doc - O'Hare Title Disclosure Form			

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<i>Wire Fraud Checklists (2)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	FT Metro	INC250103367	859581
Various updates, please render to view.			
Affected item(s): SSCORPD5635.doc - Wire Fraud Checklist SSCORPD5650.doc - Wire Fraud Checklist (Prompt)			

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RELEASE NOTES

APRIL 2025

Title

<i>Tenant Opportunity to Purchase Block (606) Endorsement</i>			
New/Mod New Request	Requested By IL State Counsel	Incident No.	TFS No. 859569
The Tenant Opportunity to Purchase Block (606) Endorsement is now available for issuance on properties in the state of Illinois.			

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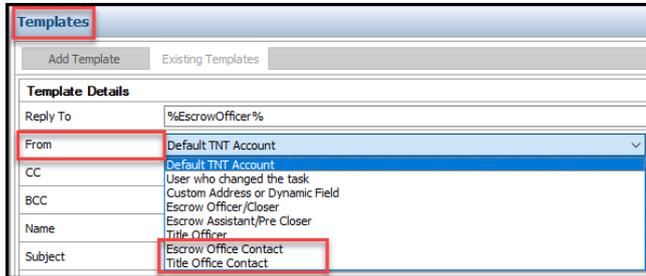
Task Notification Tool

New/Mod Mod	Requested By	Incident No.	TFS No.
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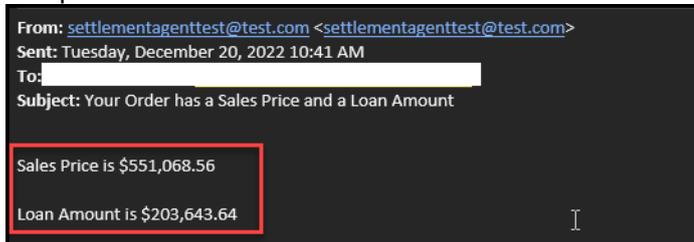
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- Added:
 - Two Dynamic Fields – **TitleOfficeContactEmail** (order.title.office.email) and **EscrowOfficeContactEmail** (order.escrow.office.email)
 - Templates Screen

- two additional **From** options: **Escrow Office Contact** and **Title Office Contact**



- **Sales Price** and **Loan Amount** now appear in currency when used in Template.



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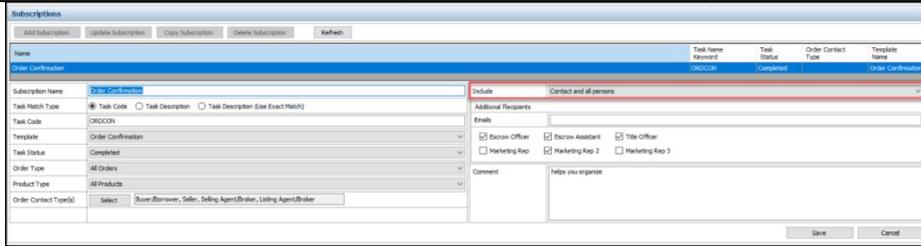
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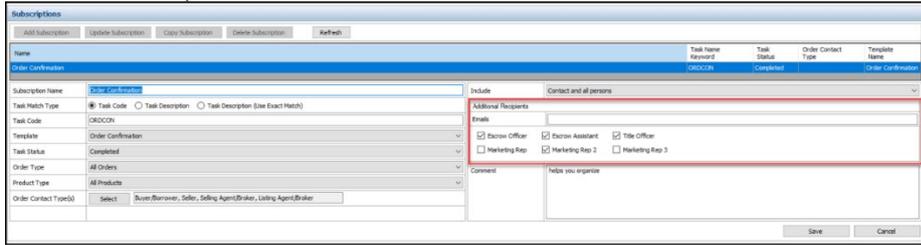
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New/Mod Mod	Requested By	Incident No.	TFS No.
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o Additional Recipients



- Added save validation to subscription: When a user selects Marketing Rep, Marketing Rep 2, or Marketing Rep 3 in a Subscription, require that Contact also be chosen in the Order Contact Type(s) field within the Subscription.
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REPORTS

<i>Disclosure Statement</i>			
New/Mod Change Request	Requested By MW IT	Incident No.	TFS No. 857779
Updated so when the Attorney Agent Split box is checked the "customer name" (which pulls from the Attorney contact) to populate in the indicated section of the document. When it is unchecked they would like it to stay blank.			
Affected item(s): ILD0227.spdoc - Disclosure Statement			

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INDIANA

DOCUMENTS

Escrow

<u>Agreement (Earnest Money)</u>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	FNF IN	INC250105034	859625
Added prompt for date. If not answered, will continue to render a blank line.			
Affected item(s): IND1088.doc - Agreement (Earnest Money)			

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<u>Instructions (Contract Assignee)</u>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	FNF Corporate		857645
Updated to add prompt to control whether or not to show the 1099-M paragraph "ASSIGNOR ACKNOWLEDGES....THERE WILL BE A 1099 MISC FILED...".			
Affected item(s): IND1166.doc - Instructions (Contract Assignee)			

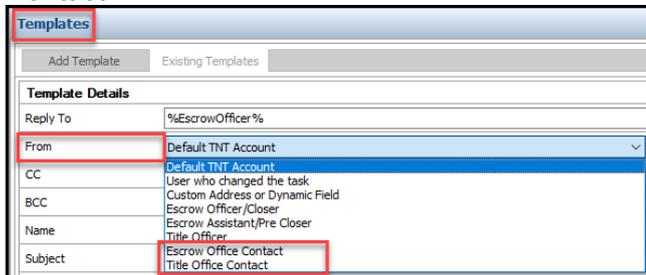
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Task Notification Tool

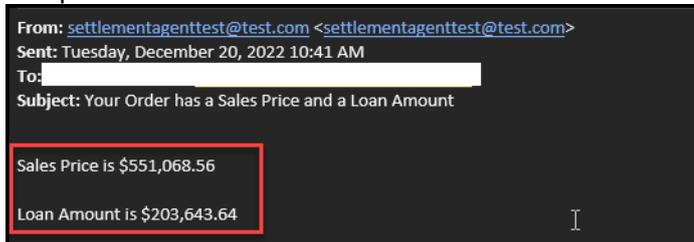
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All Screens

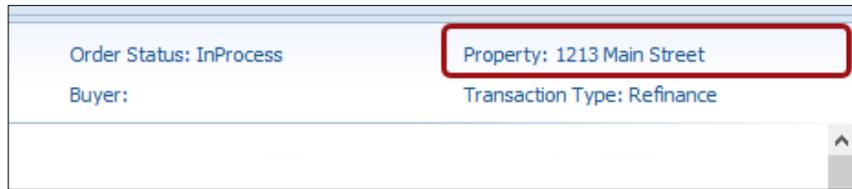
New/Mod	Requested By	Incident No.	TFS No.
Mod	Justin Cochran		

The Expressions have been modified to display the,

- > Property Address

These entries are visible when one of the following My Screens is selected:

- > IN All Screens
- > IN Commercial



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INTEGRATIONS

Rate Validation Tool

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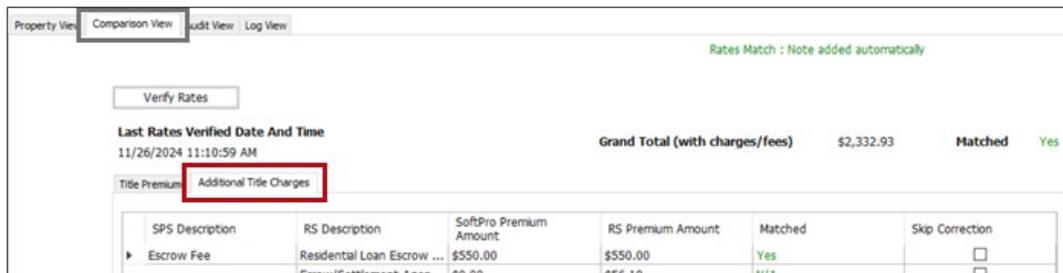
This release includes:

- › Upgrade to Feature 5.0

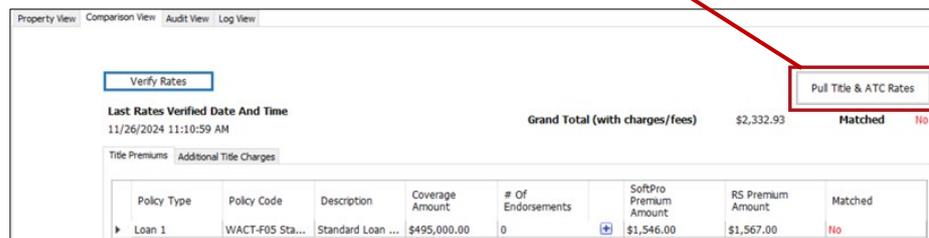
NOTE: This feature requires configuration. Reach out to FNFRatesTeam@softprocorp.com for a demo/configuration.

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.
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- » Overwrite rates in Select order

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

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 'Title Premiums' tab in the Rate Validation Tool. It features 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 'Matched' column shows 'Yes' for most items and 'No' for 'CA Document Signing Fee' and 'Parcel Count'. The 'Grand Total (with charges/fees)' is \$5,270.00.

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](#)



MICHIGAN

DOCUMENTS

Escrow

<i>Affidavit (Owner's - Commercial)</i>			
New/Mod Change Request	Requested By FT MI	Incident No. INC250079572	TFS No. 857650
Updated to use for any seller contact type, not just entities. Also, added back the ability to render this for the Borrower on refi transactions.			
Affected item(s): MID1357.doc - Affidavit (Owner's - Commercial)			

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<i>Affidavit (Property Transfer)</i>			
New/Mod Change Request	Requested By CT MI	Incident No. INC250131959	TFS No. 861052
Update to reflect most recent version.			
Affected item(s): MID1010.doc - Affidavit (Property Transfer)			

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<i>Survey Waiver</i>			
New/Mod Change Request	Requested By CT MI	Incident No. INC250093479	TFS No. 858469
Removed unnecessary check boxes.			
Affected item(s): MID1224.doc - Survey Waiver			

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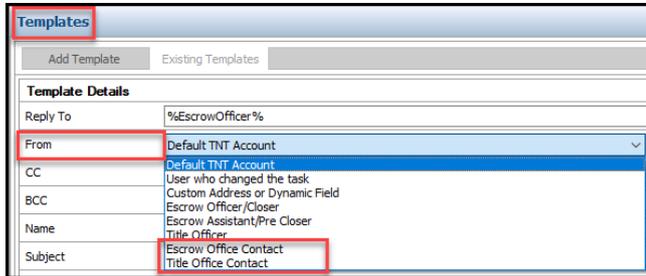
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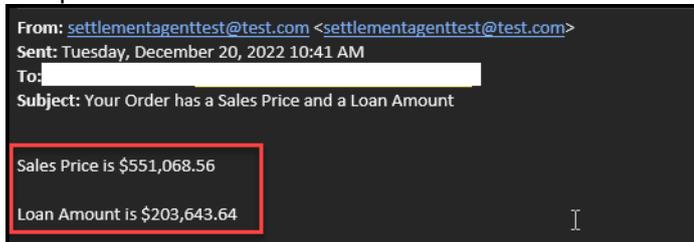
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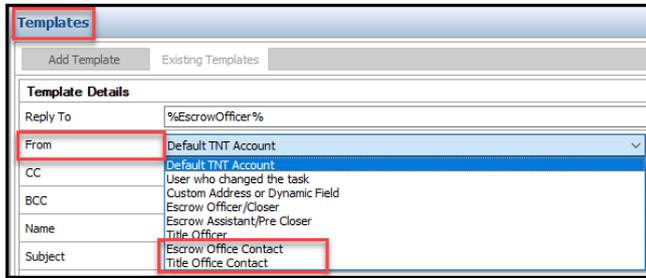
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RESOLVED: Email templates containing a dynamic field for a contact's reference # field not populating as expected.

RESOLVED: When incorrect EWSOAUH config settings were entered, logs appeared as if emails were sent successfully versus email send failure.

RESOLVED: Issue where subscriptions set for the Marketing Source and other contacts would only send the email to the Marking Source.

RESOLVED: Max Task Status Time Lapse Configuration not working for all task status.



RELEASE NOTES

APRIL 2025

<i>Task Notification Tool</i>			
New/Mod Mod	Requested By	Incident No.	TFS No.
RESOLVED: When a subscription is set to send to Buyer contacts and the Contact Type is Organization and the subscription 'Include' detail is 'Contact and all persons', the People under the Buyer Organization contact who have email addresses not receiving a TNT email.			
RESOLVED: Insert button for inline images not shown in an email template.			
RESOLVED: Buyer or Seller Attorney in an email subscription preventing the Buyer or Seller Contact from receiving the email when all are part of the same subscription.			
RESOLVED: When copying a subscription, the associated template is not retained.			
RESOLVED: OAuth secret field became un-editable.			
RESOLVED: Dynamic fields could not be inserted into an email template for customers using Windows Server 2022.			
RESOLVED: Pressing the Tab key does not advance through the email template fields in sequential order.			
RESOLVED: Established default values for Order Type, Product Type and include within subscriptions and solved a Select crash related to some of these fields.			
RESOLVED: Insert button disabled for inserting an image into the email template.			

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MISSOURI

DOCUMENTS

Escrow

<i>Certification of Trust (760 ILCS 5-8.5) - Blank</i>			
New/Mod Change Request	Requested By St. Louis Title	Incident No. INC250118351	TFS No. 860006
Updated to have 2 signatures and notaries for St. Louis Title.			
Affected item(s): ILD0580.doc - Certification of Trust (760 ILCS 5-8.5) - Blank			

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<i>MOD1139 New Construction Indemnity</i>			
New/Mod Change Request	Requested By FT STL	Incident No.	TFS No. 860360
Hard coded notary language for FT STL.			
Affected item(s): MOD1139.doc - New Construction Indemnity			

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<i>Title Disclosure - Quote</i>			
New/Mod Change Request	Requested By St. Louis Title	Incident No. INC250093984	TFS No. 858472
"Wire Handling & Service Fee" has been added.			
Affected item(s): MOD1258.doc - Title Disclosure - Quote			

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<i>WireSafe Fraud Alerts (2)</i>			
New/Mod Change Request	Requested By St. Louis Title	Incident No. INC250076974	TFS No. 860509
Added Order Number to reference line for STL ops.			
Affected item(s): SSCORPD5541.doc - WireSafe Fraud Alert SSCORPD5627.doc - WireSafe Fraud Alert (eSign)			

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MONTANA

DOCUMENTS

Escrow

<i>Certificate of Completion</i>			
New/Mod Change Request	Requested By CT Billings	Incident No.	TFS No. 858245
Updated so the user can select any General Contractor or any Subcontractor or any Buyer or any Seller.			
Affected item(s): MTD0063.doc - Certificate of Completion			

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RELEASE NOTES

APRIL 2025

Title

<i>SE 98-06 - Patent Endorsement</i>			
New/Mod New Request	Requested By MT State Counsel	Incident No.	TFS No. 858343
The SE 98-06 -Patent Endorsement is now available for issuance on properties in the state of Montana.			

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INTEGRATIONS

Rate Validation Tool

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

This release includes:

- › Changes made for Final Take Out Loan Policy codes:
 - » MTFT-25-Final Take Out Loan-Standard Policy
 - » MTFT-26-Final Take Out Loan-Extended Policy
 - » MTFT-27-Final Take Out Loan-Short Form Policy
 - » MTFT-28-Final Take Out Loan-Expanded Policy
 - » MTFT-29-Final Take Out Loan-Short Form Expanded Policy
 - » MTCT-50-Final Take Out Loan-Standard Policy
 - » MTCT-51-Final Take Out Loan-Extended Policy
 - » MTCT-52-Final Take Out Loan-Short Form Policy

Data Points adjustments include:

- » **PostConstructionEligible** – *Is this a permanent policy subsequent to the issuance of a construction mortgage policy on this property?*

This data point defaults to **Yes** in the **Rate Summary** view when one of the above policy codes is selected.

- » **PriorPolicyPremium** – *Premium paid for the construction mortgage policy (excluding the surcharge for extended coverage, if any) (if the construction loan covers multiple lots, parcels or divisible tracts, the amount of premium allocated to the is transaction)*

The value reads from the **Prior Policy Coverage Amount** field of the first loan policy.

If a value is,

- › not found, **0** is shown in the **Rate Summary** view
- › is found, the amount is shown in the **Rate Summary** view

If the value is changed on the,

- › **Rate Summary** view, the amount is updated in the **Prior Policy Coverage Amount** field
- › **Prior Policy Coverage Amount** field, the amount is updated in the **Rate Summary** view

Products

Loan1 Policy

Is this a permanent policy subsequent to the issuance of a construction mortgage policy on this property? Yes No

Premium paid for the construction mortgage policy (excluding the surcharge for extended coverage, if any) (if the construction loan covers multiple lots, parcels or divisible tracts, the amount of premium allocated to this transaction)

NOTE: The above data points are not displayed in the Rate Summary view if the Policy code selection is not a Final Take Out Loan Policy.

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NEVADA

DOCUMENTS

Escrow

<i>HOA Demand Request</i>			
New/Mod Change Request	Requested By TT Reno	Incident No.	TFS No. 859579
Various updates, please render to view.			
Affected item(s): NVD1202.doc - HOA Demand Request			

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<i>International Wire Out Supplement</i>			
New/Mod Change Request	Requested By CO OAC	Incident No.	TFS No. 860585
Updated to reflect the reason for funds sent for international wires.			
Affected item(s): NVD1307.doc - International Wire Out Supplement			

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NEW JERSEY

INTEGRATIONS

<i>NY Transfer Tax Utility</i>			
New/Mod	Requested By	Incident No.	TFS No.
Mod			
<p>This release includes:</p> <ul style="list-style-type: none"> A new subfolder has been added to the Fee Schedule for the County Transfer Tax, (separating the County and City Tax Fee Schedules) and the gross-up calculation updated to incorporate the new County Transfer Tax. 			

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<i>Rate Validation Tool</i>			
New/Mod	Requested By	Incident No.	DEVOPS No.
New			
<p>This release includes:</p> <ul style="list-style-type: none"> Upgrade to Feature 5.0 <p>NOTE: This feature requires configuration. Reach out to FNFRatesTeam@softprocorp.com for a demo/configuration.</p> <p>The ability to compare the escrow/ancillary supported charges from Rate Services to the charges being collected in the SoftPro order.</p> <ul style="list-style-type: none"> The Comparison View now includes a new tab, Additional Title 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.  <ul style="list-style-type: none"> If escrow/ancillary supported charges, <ul style="list-style-type: none"> Align with charges from Rate Services – the Comparison View tab continues to open on the Title Premiums tab. Does not align with charges from Rate Services – the Comparison View tab opens on the Title Premiums tab with a Pull button (upper right) indicating which premium/charges do not match. 			

Rate Validation Tool

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

Property View | Comparison View | Audit View | Log View

Verify Rates

Last Rates Verified Date And Time: 11/26/2024 11:10:59 AM

Grand Total (with charges/fees): \$2,332.93

Matched: No

Pull Title & ATC Rates

Policy Type	Policy Code	Description	Coverage Amount	# Of Endorsements	SoftPro Premium Amount	RS Premium Amount	Matched
Loan 1	WACT-F05 Sta...	Standard Loan ...	\$495,000.00	0	\$1,546.00	\$1,567.00	No

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

Pull Title & ATC Rates

Pull Title Rates

Pull ATC Rates

» 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.

Property View | Comparison View | Audit View | Log View

Verify Rates

Last Rates Verified Date And Time: 10/3/2024 11:51:54 AM

Grand Total (with charges/fees): \$5,270.00

Matched: No

Pull ATC Rates

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

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



NEW MEXICO

DOCUMENTS

Escrow

<i>International Wire Out Supplement</i>			
New/Mod Change Request	Requested By CO OAC	Incident No.	TFS No. 860585
Updated to reflect the reason for funds sent for international wires.			
Affected item(s): NMD1241.doc - International Wire Out Supplement			

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NEW YORK

DOCUMENTS

Escrow

ATTORNEY			
New/Mod Change Request	Requested By CT Riverhead	Incident No. INC250099579	TFS No. 858841
Removed the first sentence "Available only for property in...".			
Affected item(s): NYD1300.doc - ATTORNEY			

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ATTORNEY			
New/Mod Change Request	Requested By First Nationwide	Incident No. INC250114079	TFS No. 860172
Removed "ALL that certain plot, piece or parcel of land, situate, lying and being:" from Schedule C and the word "GUARANTEED" from the title.			
Affected item(s): NYD1300.doc - ATTORNEY			

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First Nationwide Division Letters (2)			
New/Mod Change Request	Requested By First Nationwide Title	Incident No. INC250110400	TFS No. 859627
Updated to allow users to choose brand and to allow to choose multiple addressees.			
Affected item(s): NYD1855.doc - Letter (First Nationwide Division - FNTIS) NYD1927.doc - Letter (First Nationwide Division - FNTIC)			

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INTEGRATIONS

NY Transfer Tax Utility

New/Mod Mod	Requested By	Incident No.	TFS No.
<p>This release includes:</p> <ul style="list-style-type: none">• A new subfolder has been added to the Fee Schedule for the County Transfer Tax, (separating the County and City Tax Fee Schedules) and the gross-up calculation updated to incorporate the new County Transfer Tax.			

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REPORTS

<i>Acknowledgment for Title Insurance</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	Config Team		857799
Updated as follows: <ol style="list-style-type: none">1. Fixed error when ampersand sign (&) is used, for example with CC&Rs2. Updated for Utica to show the FNF brand in the Disclosure section of the form. <p>Affected item(s): NYD1187.spdoc - Acknowledgment for Title Insurance</p>			

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<i>GFE - Cash Sheet</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	Config Team & Support		856776
Updated as follows: <ol style="list-style-type: none">1. Fixed error when ampersand sign (&) is used, for example with CC&Rs2. Updated for Utica to show the FNF brand in the Disclosure section of the form. <p>Affected item(s): NYD1117.spdoc - GFE - Cash Sheet</p>			

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OHIO

DOCUMENTS

Escrow

<i>Agreement (Escrow - Point of Sale)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	CT/FNT OH	INC250111512	859678
Updated the fee to \$100 in Section 4.			
Affected item(s): OHD1306.doc - Agreement (Escrow - Point of Sale)			

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<i>Agreement (Escrow)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	CT/FNT OH	INC250111470	859676
Updated the fee in Section 4 to \$100 and added "and/or Seller" to Section 6.			
Affected item(s): OHD1202.doc - Agreement (Escrow)			

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<i>Deed Request</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	CT OH	INC250075502	857053
Added prompts for deed type.			
Affected item(s): OHD1235.doc - Deed Request			

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<i>File Cover (Sheffield-Sandusky)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	FT OH	INC250098001	858670
Added "Legal Approval".			
Affected item(s): OHD1422.doc - File Cover (Sheffield-Sandusky)			

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<i>Funded Indemnity</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	CT/FNT OH	INC250111534	859674
Added new paragraph and deleted reference to exhibit.			
Affected item(s): OHD1219.doc - Funded Indemnity			

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RELEASE NOTES

APRIL 2025

Letter (Funds Held POS)			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	CT OH	INC250093101	858419
New document, please render to view.			
Tree Location: Escrow Documents>Letters			
Affected item(s): OHD1495.doc - Letter (Funds Held POS)			

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Letter (Revolving Credit Accounts Payment)			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	CTI Cleveland	INC250090617	858450
Updated to include the payee's name(s) with the amounts selected.			
Affected item(s): OHD1341.doc - Letter (Revolving Credit Accounts Payment)			

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New Order Sheet			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	FT NCS Great Lakes	INC250104491	859374
Property has been added and removed Closing Location.			
Affected item(s): OHD1112.doc - New Order Sheet			

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Escrow/Title

<i>OHD1139 - Deed (General Warranty)</i>			
New/Mod Change Request	Requested By CT OHIO	Incident No.	TFS No. 860649
Added (Grantee) label after Grantee names.			
Affected item(s): OHD1349.doc - Deed (General Warranty)			

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RELEASE NOTES

APRIL 2025

Title

<i>ALTA Homeowner's Policy of Title Insurance 2021 (OH)</i>			
New/Mod Change Request	Requested By OH State Counsel	Incident No.	TFS No. 859437
The ALTA Homeowner's Policy of Title Insurance 2021 (OH), has been corrected to reflect \$25,000 (not \$5,000) as the Maximum Dollar Limit for Covered Risk 21 shown on Schedule A.			
Affected item(s): OHD1485.doc - ALTA Homeowner's Policy of Title Insurance 2021 (OH)			

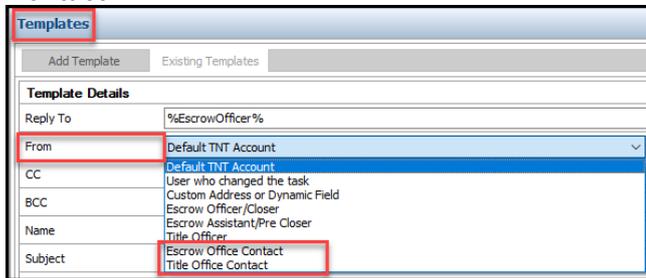
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Task Notification Tool

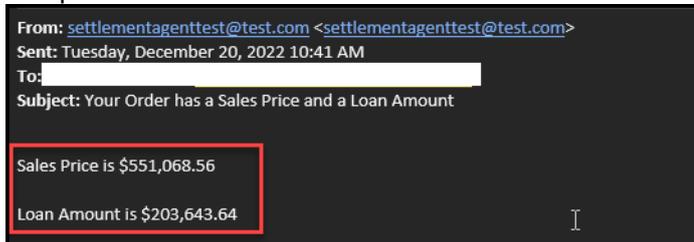
New/Mod	Requested By	Incident No.	TFS No.
Mod			

This release includes:

- Email – EWS OAuth option has been added to the Configuration in SPAdmin. The newly added option provides customers with another option when using Exchange Web Services (EWS).
- Added:
 - Two Dynamic Fields – **TitleOfficeContactEmail** (order.title.office.email) and **EscrowOfficeContactEmail** (order.escrow.office.email)
 - Templates Screen
 - two additional **From** options: **Escrow Office Contact** and **Title Office Contact**



- **Sales Price** and **Loan Amount** now appear in currency when used in Template.



- Subscription Screen – ability to choose multiple **Order Contact Types** when creating a Subscription. The **Order Contact Type(s)** chosen are shown in the text field to the right of the Select button and one email is sent to each of the selected Types.

Task Notification Tool

<p>New/Mod Mod</p>	<p>Requested By</p>	<p>Incident No.</p>	<p>TFS No.</p>
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- Additional logging added to gain more knowledge around a “General failure” exception written to the Event Log.
- Added logging statements in the **GeneralEmailClass**.
- Additional logging added for getting token, creating email message, and adding attachments.
- A new error message writes to the Event Log when an issue occurs that causes the service to stop, and the service will attempt to continue until completion.
- New functionality when an email is sent using a subscription with multiple order contacts chosen, a single email is sent to all order contacts on the subscription (versus a single email to each recipient). When a recipient responds to the email, the other parties do not receive the response.
- Previously the ‘AcquireTokenForClient’ api call asynchronously waiting for the task to complete and then return the results; changed to block the current thread until the result is available.
- Additional logging added and checked ‘null’ for Token and log the same.
- Emails now going out to,
 - Organization Contacts listed in Subscription

Task Notification Tool

New/Mod Mod	Requested By	Incident No.	TFS No.
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o Additional Recipients

- Added save validation to subscription: When a user selects Marketing Rep, Marketing Rep 2, or Marketing Rep 3 in a Subscription, require that Contact also be chosen in the Order Contact Type(s) field within the Subscription.
- Database Manager added to support upgrades from v2.16.1.43+ to latest release.
- Should an error occur when sending an email, the email address for the contact chosen in the **From** drop-down in the Template will populate in the event viewer message.
- Updated the configuration settings save message to read: *TNT configuration changes will take effect when the Select services are restarted.* So as not to cause confusion about changes being instant.
- Save validation added to subscription: Will require valid email address format for **Additional Recipient** field.
- Updated **Order Contact Type** column in subscriptions to display list of selected Contacts.
- Updated the serialized Queue Location Setting to mirror that of the Logs (separate file name vs. file path) for consistency.
- Updated the Log File Path settings to establish a default value.
- Several configuration setting labels updated to clarify their use and changed the Email Service Type and Log Level settings to a drop-down.
- Embedded the SoftPro.Common.Encryption2.DLL to load from memory.
- Created a stored procedure to be used for deleting the TNT schema as part of the uninstall process.
- Hardened the validation rules around supported email address formats.
- Removed validation of email addresses from the email send workflow. This ensures that if any one email address for the batch of contacts in a subscription is invalid, the message will still send and those with valid email addresses will receive the message.

RESOLVED: Issue where an exception error received when selecting a contact type in subscriptions.

RESOLVED: Issue where an error received when the parameter "From" cannot be an empty string. Parameter name: from.

RESOLVED: Issue where a negative number displaying in the Order Contact field on subscriptions.

RESOLVED: Log files inaccessible through SPAdmin.

RESOLVED: Email templates containing a dynamic field for a contact's reference # field not populating as expected.

RESOLVED: When incorrect EWSOAUH config settings were entered, logs appeared as if emails were sent successfully versus email send failure.

RESOLVED: Issue where subscriptions set for the Marketing Source and other contacts would only send the email to the Marking Source.

RESOLVED: Max Task Status Time Lapse Configuration not working for all task status.



RELEASE NOTES

APRIL 2025

Task Notification Tool

New/Mod Mod	Requested By	Incident No.	TFS No.
<p>RESOLVED: When a subscription is set to send to Buyer contacts and the Contact Type is Organization and the subscription 'Include' detail is 'Contact and all persons', the People under the Buyer Organization contact who have email addresses not receiving a TNT email.</p> <p>RESOLVED: Insert button for inline images not shown in an email template.</p> <p>RESOLVED: Buyer or Seller Attorney in an email subscription preventing the Buyer or Seller Contact from receiving the email when all are part of the same subscription.</p> <p>RESOLVED: When copying a subscription, the associated template is not retained.</p> <p>RESOLVED: OAuth secret field became un-editable.</p> <p>RESOLVED: Dynamic fields could not be inserted into an email template for customers using Windows Server 2022.</p> <p>RESOLVED: Pressing the Tab key does not advance through the email template fields in sequential order.</p> <p>RESOLVED: Established default values for Order Type, Product Type and include within subscriptions and solved a Select crash related to some of these fields.</p> <p>RESOLVED: Insert button disabled for inserting an image into the email template.</p>			

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OKLAHOMA

DOCUMENTS

Escrow

<i>Affidavit (Stray Instrument)</i>			
New/Mod Change Request	Requested By Smith Brother's Abstract	Incident No. INC250095424	TFS No. 858465
Updated document to reference correct Title.			
Affected item(s): OKD1226.doc - Affidavit (Stray Instrument)			

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Order Entry Screen

New/Mod Mod	Requested By Jonathan Gann	Incident No.	TFS No.
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The **Order Entry** screen has been updated to include the **Rush order** check box.
This change is visible when the **My Screens > AF – Smith Brothers** screen is selected.

The screenshot shows the 'Express Order Entry' interface. At the top, there are navigation arrows and the title 'Express Order Entry'. Below this, a 'Rush order' checkbox is highlighted with a red rectangular box. Underneath, there are several sections: 'Transaction type' with radio buttons for Purchase, Refinance (selected), Equity, and Other; a list of checkboxes for Commercial, Master of multi-site, Construction, Cash sale, and Out of county; and three dropdown menus for Order type, Product type, and Policy type.

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OREGON

DOCUMENTS

Escrow

<i>Affidavit (Indemnity Agreement by Owner)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	Western Title and Escrow		860592
Blank lines shortened so they no longer wrap to the next line.			
Affected item(s): ORD1115.doc - Affidavit (Indemnity Agreement by Owner - Legal) ORD1526.doc - Affidavit (Indemnity Agreement by Owner)			

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<i>Instructions (Recording)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	NW System Admin		859577
Updated to filter the County name in the upper right to the first property.			
Affected item(s): ORD1470.doc - Instructions (Recording)			

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<i>ORD1457 - Verification of Commission</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	TT-Medford		860415
Removed checkbox option for delivery.			
Affected item(s): ORD1457.doc - Verification of Commission			

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Phrase(s)

New EI Phrase			
New/Mod New Request	Requested By Western Title & Escrow	Incident No.	TFS No. 858369
Code: ins03 / HAZARD/HOMEOWNER'S/CONTENT'S INSURANCE INSURANCE: Parties are aware that the underlying Lender may be notified of the sale of the property through existing or new hazard/homeowner's/content's insurance activity and are further aware that the Buyer and/or Seller may still need contents, hazard/homeowner's and/or other insurance to protect their interest in the property in the event of damage or destruction. However, Buyer and Seller have elected to handle insurance direct and outside of escrow and hereby relieve Escrow Agent of any and all responsibility, liability and risk of loss whatsoever from any and all matters pertaining thereto. Escrow Agent shall have no responsibility pertaining to insurance, including but not limited to Seller and/or underlying Lender being named as a lender loss payable; obtaining any evidence of such insurance or for payment of any premium. Seller should not cancel any existing policy without first consulting with his Insurance Agent. Parties are aware that insurance should be in place and paid for prior to recordation of this transaction.			

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INTEGRATIONS

Rate Validation Tool

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

- › Changes made for **OTIRO 87 – Policy Date Down**

Data Points adjustments include:

- » **EndorsementEffectiveDate** (SPS field - **IssuedDate**)
- » **PriorPolicyEffectiveDate** (SPS field – **EffectiveDate**)

The SPS fields populate when the Endorsement is selected in the Select Order.

Lookup Code: E110087_00_OR_L
 Code: OTIRO 087 Pro Forma
 Description: OTIRO 87 - Policy Date Down - To be issued within 90 days from Policy Date
 Transaction code: 4040 New liability amount:
 Issued date: 05/01/2025 Effective date: 04/01/2025

- » These data points are now displayed in the **Rate Summary** view in the **Endorsements** section.

Endorsements
 Loan1 Policy
 ✓ OTIRO 87 - Policy Date Down - To be issued within 90 days from Policy Date
 Endorsement Issue Date: 05/01/2025
 Date of prior policy: 04/01/2025

- » If the value is not entered in the SPS field, the questions are shown with a placeholder **(MM/DD/YYYY)**.
- » If the value is changed on the **Rate Summary** view, the corresponding SPS fields are updated.

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RHODE ISLAND

INTEGRATIONS

NY Transfer Tax Utility

New/Mod Mod	Requested By	Incident No.	TFS No.
<p>This release includes:</p> <ul style="list-style-type: none">• A new subfolder has been added to the Fee Schedule for the County Transfer Tax, (separating the County and City Tax Fee Schedules) and the gross-up calculation updated to incorporate the new County Transfer Tax.			

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TEXAS

DOCUMENTS

Escrow

<i>Affiliated Business Arrangement Disclosure Statements (2)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	Alamo Title	INC250086085	858660
Added sig blocks for TX users only.			
Affected item(s): SSCORPD5927.doc - Affiliated Business Arrangement Disclosure Statement SSCORPD5945.doc - Affiliated Business Arrangement Disclosure Statement (esign)			

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<i>Assignee Instructions</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	FNF Corporate		857648
Updated to add prompt to control whether or not to show the 1099-M paragraph "ASSIGNOR ACKNOWLEDGES....THERE WILL BE A 1099 MISC FILED..."			
Affected item(s): TXFNFESC_AssigneeInstructions.doc - Assignee Instructions			

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<i>Third Party Deposit Language</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	Settlement		860163
Updated language on documents to reflect:			
I hand you herewith, or I will be depositing , my check...			
I have wired, or will wire , \$ _____ to your...			
Affected item(s): TXFNFESC_ThirdPartyDepositEscrowInstructions.doc - Third Party Deposit Escrow Instructions			

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REPORTS

Order Tasks by Order Date

New/Mod Change Request	Requested By Dallas CPF Admin	Incident No.	TFS No. 856360
Updated as follows:			
<ol style="list-style-type: none"> 1. Added the 'Brand' to the Group 1 options and to the Excel export - All columns 2. Added order status column to the end of the Excel export - All columns 			
NOTE: Report is in Maintenance - additional parameters cannot be added.			
Affected item(s): SSCORP5475.rpt - Order Tasks by Order Date			

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Order Tasks by Task Dates

New/Mod Change Request	Requested By Dallas CPF Admin	Incident No.	TFS No. 856363
Updated as follows:			
<ol style="list-style-type: none"> 1. Added the 'Brand' to the Group 1 options and to the Excel export - All columns 2. Added order status column to the end of the Excel export - All columns 			
NOTE: Report is in Maintenance - additional parameters cannot be added.			
Affected item(s): SSCORP5474.rpt - Order Tasks by Task Dates			

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Task Turn-Time

New/Mod Change Request	Requested By Dallas CPF Admin	Incident No.	TFS No. 856353
Added "Brand" picklist and functionality for TX Ops.			
Affected item(s): SSCORP5423.rpt - Task Turn-Time			

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UTAH

DOCUMENTS

Escrow

<i>Affidavit (Successor Trustee)</i>			
New/Mod Change Request	Requested By Utah	Incident No. INC250075776	TFS No. 857633
Updated name of the document to "Affidavit (Surviving Trustee)".			
Affected item(s): UTD1015.doc - Affidavit (Successor Trustee) nka Affidavit (Surviving Trustee)			

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<i>Affidavit (Successor Trustee)</i>			
New/Mod New Request	Requested By UT	Incident No. INC250075776	TFS No. 857961
New document, please render to view.			
Document will be placed in the following tree: 1-Utah Documents>General>Affidavits			
Affected item(s): UTD1141.doc - Affidavit (Successor Trustee)			

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<i>International Wire Out Supplement</i>			
New/Mod Change Request	Requested By CO OAC	Incident No.	TFS No. 860585
Updated to reflect the reason for funds sent for international wires.			
Affected item(s): UTD1026.doc - International Wire Out Supplement			

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WASHINGTON

DOCUMENTS

Escrow

<i>Agent's Certification (POA Power of Attorney)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	WA		857635
Updated to allow users to pull other contacts in the file.			
Affected item(s): WA00001038.doc - Agent's Certification (POA Power of Attorney)			

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<i>Certification of No Operating Agreement for LLC</i>			
New/Mod	Requested By	Incident No.	TFS No.
New Request	CT/FT Vancouver		858653
New document, please render to view.			
Affected item(s): WA00001111.doc - Certification of No Operating Agreement for LLC			

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<i>MH Real Estate Excise Tax Affidavit (12/06/2024)</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	System Admin		858651
Updated seller's phones to pull from cell.			
Affected item(s): WA00000975.doc - MH Real Estate Excise Tax Affidavit (12/06/2024)			

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<i>Questionnaire</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	CT Everett		860165
Added question for remodeling.			
Affected item(s): WA00000983.doc - Questionnaire WA00000983.doc - Questionnaire (Buyer-Borrower) WA00000983.doc - Questionnaire (Seller)			

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RELEASE NOTES

APRIL 2025

REETAs (6)			
New/Mod Change Request	Requested By WA	Incident No.	TFS No. 859193
Updated to provide most recent versions.			
<u>Affected item(s):</u> WA00000305.doc - Master Real Estate Excise Tax Affidavit (04/01/2025) Multi Deed WA00000307.doc - MH Real Estate Excise Tax Affidavit (04/01/2025) WA00001070.doc - Master Real Estate Excise Tax Affidavit (04/01/2025) WA00001072.doc - Master Real Estate Excise Tax Affidavit (04/01/2025) Multiple Location WA00001074.doc - Master Real Estate Excise Tax Affidavit (04/01/2025) Exempt WA00001075.doc - Master Real Estate Excise Tax Affidavit (04/01/2025) Multiple Affidavits			

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Various Screens

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

The following Screen changes are visible for the **My Screen** selections shown.

› **Washington Commercial CSS Screens**

Before

Open Order/General

- ▶ Order Entry
- Title Insurance Premiums
- Policy Selection
- Status
- Order Contacts
- Order Information
- Property
- Sales Contract & Earnest Money

Document Preparation

Settlement Statement

- Additional Title Charges
- Title Insurance Premiums
- Endorsements
- Prorations
- Property Taxes
- Rent Schedule
- Loan Information & Funding
- Statement Header
- Statement Charges
- Statement Signatures & Footer

Miscellaneous

- Order Balance
- Rent Schedule
- Affidavit
- Loan Terms & Payments
- Options
- Seller Proceeds & 1099-S
- Order Transactions

After

Open Order/General

- ▶ Order Entry
- Order Contacts
- Loan Information & Funding
- Sales Contract & Earnest Money
- Order Information
- Property
- Status
- Title Insurance Premiums

Document Preparation

Settlement Statement

- Additional Title Charges
- Prorations
- Property Taxes
- Loan Information & Funding
- Loan Terms & Payments
- Title Insurance Premiums
- Endorsements
- Seller Proceeds & 1099-S
- Statement Header
- Statement Charges
- Statement Signatures & Footer
- Order Transactions
- Order Balance
- Options

Various Screens

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

> **Washington Commercial Screens**

Before

Open Order/General

- ▶ Order Entry
- Title Insurance Premiums
- Policy Selection
- Status
- Order Contacts
- Order Information
- Property
- Sales Contract & Earnest Money

Document Preparation

Settlement Statement

- Additional Title Charges
- Title Insurance Premiums
- Endorsements
- Prorations
- Rent Schedule
- Loan Information & Funding
- Settlement Options

Miscellaneous

- Order Balance
- Rent Schedule
- Affidavit
- Loan Terms & Payments
- Options
- Seller Proceeds & 1099-S
- Order Transactions

After

Open Order/General

- ▶ Order Entry
- Order Contacts
- Loan Information & Funding
- Sales Contract & Earnest Money
- Order Information
- Property
- Status
- Title Insurance Premiums

Document Preparation

Settlement Statement

- Additional Title Charges
- Prorations
- Property Taxes
- Loan Information & Funding
- Loan Terms & Payments
- Title Insurance Premiums
- Endorsements
- Seller Proceeds & 1099-S
- Statement Header
- Statement Charges
- Statement Signatures & Footer
- Order Transactions
- Order Balance
- Options

Various Screens

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

> **Washington Escrow Screens**

Before

Open Order/General

- ▶ Order Entry
- Order Contacts
- Loan Information & Funding
- Sales Contract & Earnest Money
- Order Information
- Property
- Status
- Title Insurance Premiums
- Policy Selection

Document Preparation

Closing

- Additional Title Charges
- City/Town Taxes
- County Taxes
- Assessments
- Additional Taxes
- HOA Charges & Prorations
- Loan Information & Funding
- Loan Terms & Payments
- Title Insurance Premiums
- Endorsements
- Seller Proceeds & 1099-S
- CDF Pg1-Closing Info/Proj Pymts
- CDF Pg2-Sections A-J
- CDF Pg3-Sections K-N & Calc Ca...
- CDF Pg4-Loan Disclosure, AP, AIR
- CDF Pg5-Loan Calc, Other Disc...
- Delivery & Tracking
- Order Transactions
- Order Balance
- Options

Refinance

- Additional Title Charges
- Loan Information & Funding
- Loan Terms & Payments
- Title Insurance Premiums
- Endorsements
- CDF Pg1-Closing Info/Proj Pymts
- CDF Pg2-Sections A-J
- CDF Pg3-Sections K-N & Calc Ca...
- CDF Pg4-Loan Disclosure, AP, AIR
- CDF Pg5-Loan Calc, Other Disc...
- Delivery & Tracking
- Stmt./HUD Amounts
- Order Balance
- Options

Miscellaneous

After

Open Order/General

- ▶ Order Entry
- Order Contacts
- Loan Information & Funding
- Sales Contract & Earnest Money
- Order Information
- Property
- Status
- Title Insurance Premiums

Document Preparation

Closing

- Additional Title Charges
- City/Town Taxes
- County Taxes
- Assessments
- Additional Taxes
- Prorations
- Loan Information & Funding
- Loan Terms & Payments
- Title Insurance Premiums
- Endorsements
- Seller Proceeds & 1099-S
- CDF Pg1-Closing Info/Proj Pymts
- CDF Pg2-Sections A-J
- CDF Pg3-Sections K-N & Calc Ca...
- CDF Pg4-Loan Disclosure, AP, AIR
- CDF Pg5-Loan Calc, Other Disc...
- Delivery & Tracking
- Order Transactions
- Order Balance
- Options

Refinance

- Additional Title Charges
- Loan Information & Funding
- Loan Terms & Payments
- Title Insurance Premiums
- Endorsements
- CDF Pg1-Closing Info/Proj Pymts
- CDF Pg2-Sections A-J
- CDF Pg3-Sections K-N & Calc Ca...
- CDF Pg4-Loan Disclosure, AP, AIR
- CDF Pg5-Loan Calc, Other Disc...
- Delivery & Tracking
- Order Transactions
- Order Balance
- Options

Various Screens

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

› **Washington Screen List**

Before

Open Order/General

- ▶ Order Entry
- Title Insurance Premiums
- Status
- Order Contacts
- Order Information
- Property
- Sales Contract & Earnest Mo...

Document Preparation

Closing

- Additional Title Charges
- City/Town Taxes
- County Taxes
- Assessments
- Additional Taxes
- HOA Charges & Prorations
- Loan Information & Funding
- Loan Terms & Payments
- Title Insurance Premiums
- Endorsements
- Seller Proceeds & 1099-S
- CDF Pg1-Closing Info/Proj Py...
- CDF Pg2-Sections A-J
- CDF Pg3-Sections K-N & Calc...
- CDF Pg4-Loan Disclosure, AP...
- CDF Pg5-Loan Calc, Other DI...
- Delivery & Tracking
- Order Transactions
- Order Balance
- Options

Commitment

Policy

Guarantee

Invoicing

Title Misc

Refinance

Commercial

Payoff

Miscellaneous

After

Open Order/General

- ▶ Order Entry
- Order Contacts
- Loan Information & Funding
- Sales Contract & Earnest Mo...
- Order Information
- Property
- Status
- Title Insurance Premiums

Document Preparation

Closing

- Additional Title Charges
- City/Town Taxes
- County Taxes
- Additional Taxes
- Assessments
- Prorations
- Loan Information & Funding
- Loan Terms & Payments
- Title Insurance Premiums
- Endorsements
- Seller Proceeds & 1099-S
- CDF Pg1-Closing Info/Proj Py...
- CDF Pg2-Sections A-J
- CDF Pg3-Sections K-N & Calc...
- CDF Pg4-Loan Disclosure, AP...
- CDF Pg5-Loan Calc, Other DI...
- Delivery & Tracking
- Order Transactions
- Order Balance
- Options

Commitment

Policy

Guarantee

Invoicing

Title Misc

Refinance

- Additional Title Charges
- Loan Information & Funding
- Loan Terms & Payments
- Title Insurance Premiums
- Endorsements
- CDF Pg1-Closing Info/Proj Pymts
- CDF Pg2-Sections A-J
- CDF Pg3-Sections K-N & Calc Ca...
- CDF Pg4-Loan Disclosure, AP, AIR
- CDF Pg5-Loan Calc, Other Disc,...
- Delivery & Tracking
- Order Balance
- Options

Payoff

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REPORTS

EPU Task Summary/Productivity by County Manager

New/Mod Change Request	Requested By PacNW IT	Incident No.	TFS No. 858731
Updated 'Washington EPU Tasks' (and All EPU Tasks) to provide a column, for a Requested Task as "EPU - Post Closing - Final Policy".			
Affected item(s): SSCORP5149.rpt - EPU Task Summary/Productivity by County Manager			

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EPU Task Summary/Productivity by Employee

New/Mod Change Request	Requested By PacNW IT	Incident No.	TFS No. 858735
Updated 'Washington EPU Tasks' (and All EPU Tasks) to provide a column, for a Requested Task as "EPU - Post Closing - Final Policy".			
Affected item(s): SSCORP5150.rpt - EPU Task Summary/Productivity by Employee			

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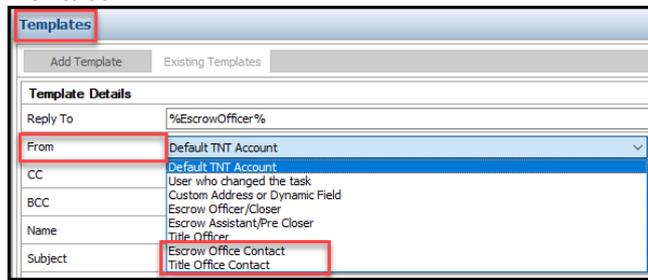
INTEGRATIONS

Task Notification Tool

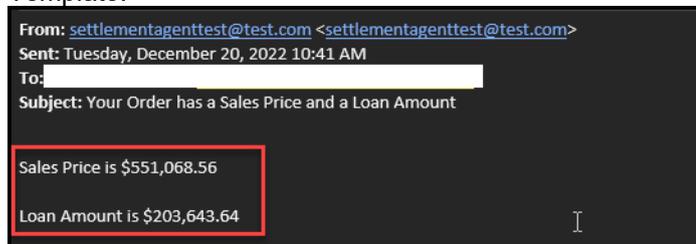
New/Mod Mod	Requested By	Incident No.	TFS No.
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This release includes:

- Email – EWS OAuth option has been added to the Configuration in SPAdmin. The newly added option provides customers with another option when using Exchange Web Services (EWS).
- Added:
 - Two Dynamic Fields – **TitleOfficeContactEmail** (order.title.office.email) and **EscrowOfficeContactEmail** (order.escrow.office.email)
 - Templates Screen
 - two additional **From** options: **Escrow Office Contact** and **Title Office Contact**



- **Sales Price** and **Loan Amount** now appear in currency when used in Template.



- Subscription Screen – ability to choose multiple **Order Contact Types** when creating a Subscription. The **Order Contact Type(s)** chosen are shown in the text field to the right of the Select button and one email is sent to each of the selected Types.

Task Notification Tool

<p>New/Mod Mod</p>	<p>Requested By</p>	<p>Incident No.</p>	<p>TFS No.</p>
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- Additional logging added to gain more knowledge around a “General failure” exception written to the Event Log.
- Added logging statements in the **GeneralEmailClass**.
- Additional logging added for getting token, creating email message, and adding attachments.
- A new error message writes to the Event Log when an issue occurs that causes the service to stop, and the service will attempt to continue until completion.
- New functionality when an email is sent using a subscription with multiple order contacts chosen, a single email is sent to all order contacts on the subscription (versus a single email to each recipient). When a recipient responds to the email, the other parties do not receive the response.
- Previously the ‘AcquireTokenForClient’ api call asynchronously waiting for the task to complete and then return the results; changed to block the current thread until the result is available.
- Additional logging added and checked ‘null’ for Token and log the same.
- Emails now going out to,
 - Organization Contacts listed in Subscription

Task Notification Tool

New/Mod Mod	Requested By	Incident No.	TFS No.
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o Additional Recipients

- Added save validation to subscription: When a user selects Marketing Rep, Marketing Rep 2, or Marketing Rep 3 in a Subscription, require that Contact also be chosen in the Order Contact Type(s) field within the Subscription.
- Database Manager added to support upgrades from v2.16.1.43+ to latest release.
- Should an error occur when sending an email, the email address for the contact chosen in the **From** drop-down in the Template will populate in the event viewer message.
- Updated the configuration settings save message to read: *TNT configuration changes will take effect when the Select services are restarted.* So as not to cause confusion about changes being instant.
- Save validation added to subscription: Will require valid email address format for **Additional Recipient** field.
- Updated **Order Contact Type** column in subscriptions to display list of selected Contacts.
- Updated the serialized Queue Location Setting to mirror that of the Logs (separate file name vs. file path) for consistency.
- Updated the Log File Path settings to establish a default value.
- Several configuration setting labels updated to clarify their use and changed the Email Service Type and Log Level settings to a drop-down.
- Embedded the SoftPro.Common.Encryption2.DLL to load from memory.
- Created a stored procedure to be used for deleting the TNT schema as part of the uninstall process.
- Hardened the validation rules around supported email address formats.
- Removed validation of email addresses from the email send workflow. This ensures that if any one email address for the batch of contacts in a subscription is invalid, the message will still send and those with valid email addresses will receive the message.

RESOLVED: Issue where an exception error received when selecting a contact type in subscriptions.

RESOLVED: Issue where an error received when the parameter "From" cannot be an empty string. Parameter name: from.

RESOLVED: Issue where a negative number displaying in the Order Contact field on subscriptions.

RESOLVED: Log files inaccessible through SPAdmin.

RESOLVED: Email templates containing a dynamic field for a contact's reference # field not populating as expected.

RESOLVED: When incorrect EWSOAUH config settings were entered, logs appeared as if emails were sent successfully versus email send failure.

RESOLVED: Issue where subscriptions set for the Marketing Source and other contacts would only send the email to the Marking Source.

RESOLVED: Max Task Status Time Lapse Configuration not working for all task status.



RELEASE NOTES

APRIL 2025

Task Notification Tool

New/Mod Mod	Requested By	Incident No.	TFS No.
<p>RESOLVED: When a subscription is set to send to Buyer contacts and the Contact Type is Organization and the subscription 'Include' detail is 'Contact and all persons', the People under the Buyer Organization contact who have email addresses not receiving a TNT email.</p> <p>RESOLVED: Insert button for inline images not shown in an email template.</p> <p>RESOLVED: Buyer or Seller Attorney in an email subscription preventing the Buyer or Seller Contact from receiving the email when all are part of the same subscription.</p> <p>RESOLVED: When copying a subscription, the associated template is not retained.</p> <p>RESOLVED: OAuth secret field became un-editable.</p> <p>RESOLVED: Dynamic fields could not be inserted into an email template for customers using Windows Server 2022.</p> <p>RESOLVED: Pressing the Tab key does not advance through the email template fields in sequential order.</p> <p>RESOLVED: Established default values for Order Type, Product Type and include within subscriptions and solved a Select crash related to some of these fields.</p> <p>RESOLVED: Insert button disabled for inserting an image into the email template.</p>			

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NCS

DOCUMENTS

Escrow

New Docs (2)			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	CT Long Beach NCS CA	INC250096261	860180
New documents, please render to view.			
Tree Placement: Escrow>Bulk			
Affected item(s): COMD1322.doc - Letter (Claims Denial) COMD1321.doc - Letter (Claims Acknowledgment)			

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Wire Account Notification (NCS - Commercial)			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	CT CA NCS	INC250095385	858448
Added "ACH Electronic Transfers will NOT be accepted. ACH will be rejected and returned."			
Affected item(s): SSCORPD5545.doc - Wire Account Notification (NCS - Commercial) SSCORPD5937.doc - Wire Account Notification with Wire Fraud Alert Notice (NCS - Commercial) SSCORPD5962.doc - Wire Account Notification with Third Party Depositor (NCS - Commercial)			

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INTEGRATIONS

CRRAR

New/Mod Mod	Requested By	Incident No.	TFS No.
<p>**This is an Accounting related enhancement and will be implemented at the direction of National Accounting in coordination with the OACs.**</p> <p>This release includes:</p> <ul style="list-style-type: none"> • Update error output to include Order numbers for invoice and ledger transfer transactions (when available). • Corrected build problems by inspecting .csproj and adding missing NuGet instructions. • Added Code Coverage Metrics for Unit Test Coverage. • Restore automatic versioning and licensing capabilities. • Logic added to the CRRAR XML Delivery server package to review the name of the revenue ledger during a cash push (aka disburse transferred funds). If the name is a prefix of, GCD, the cash push XML payload will have a deposit type of GCD. No change for cash pushes from other revenue ledgers; they remain FTD. <p>RESOLVED: Issue with Cash Push not outputting information in stage 2 – processing items retried from DQueue – when EnableCashPushLogging is in settings file and enabled.</p> <p>RESOLVED: Cash push logging issue where only the first of three expected messages were displaying.</p> <p>RESOLVED: When a user posts a charge to non-FNF contract (buyer/seller) there is nothing to send to <i>FNF CRRAR</i> causing an <i>“Exception occurred while handling Select notification ‘FDC.’ Notification is being discarded.”</i> error. Logic error assumes there will always be at least one charge to send. Now validate count of bucket items and safely handle zero items.</p>			

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REPORTS

<i>Closing Calendar</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	CTI NY NCS Admin - Imp/Config		859516
<p>" Excel Export - Custom Brief" will display a row for each closing date based on custom field 'ClosingDays_FNF#',</p> <p>Ex: If custom field has a value of 3, there will 3 entries for the order.</p> <p>The first entry is the Settlement Date, the 2nd is the next work day after that and the 3rd is the next work after the 2nd.</p> <p>Affected item(s): SSCORP5271.rpt - Closing Calendar</p>			

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<i>Closing Calendar</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	CTI NY NCS Admin - Imp/Config		857999
<p>Updated "Excel Export" parameter checkbox to a dropdown where"</p> <ul style="list-style-type: none"> a. NONE = Default b. Standard c. Custom Brief (will be used by CTI NY NCS) <p>Affected item(s): SSCORP5271.rpt - Closing Calendar</p>			

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<i>FNF Checks</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	CTI NCS NY & Config Team		858751
<p>Added an exception for CT NY, since all their checks must go out as Chicago Title Insurance Company, regardless of the brand</p> <p>Affected item(s): FNFCORP_DefaultCheck.rpt - FNF Default Check Template</p>			

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<i>Invoice</i>			
New/Mod	Requested By	Incident No.	TFS No.
Change Request	NY NCS Ops		859109
<p>Removed "Operation" for all NY NCS Ops.</p> <p>Affected item(s): SSCORPD3003.spdoc - Consolidated Invoice SSCORPD5021.spdoc - Invoice</p>			

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RELEASE NOTES

APRIL 2025

NY Application

New/Mod	Requested By	Incident No.	TFS No.
Change Request	CT/CLT/FT NY NCS		859048
Included miscellaneous updates for NY NCS ops.			
Affected item(s): NYD1030.spdoc - NY Application			

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Site Sheet

New/Mod	Requested By	Incident No.	TFS No.
New Request	CT NCS NY		859494
New report for CT NCS NY.			
Affected item(s): SSCORP5618.rpt - Site Sheet			

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