



ProForm User Guide

SoftPro Select 4.0 | Friday, August 21, 2015

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Table of Contents

SoftPro Select Overview	6
Resources.....	6
User Logins.....	7
Using SoftPro Select Help	8
ProForm Start Page Overview.....	8
Getting Around SoftPro	12
Print Preview.....	16
GoTo.....	17
Create New Item Menu	17
Creating a New Order	17
Reserving Orders.....	19
Closing an Order	21
Overlaying an Order.....	21
Searching for an Order.....	23
Wildcards	24
Renaming an Order.....	26
Overlaying Requirements and Exceptions.....	26
Overlaying Order Contacts	27
Workflow	29
Completing Assigned Tasks.....	30
Assign Step.....	32
My Orders Tab	32
Queues.....	35
Workflow Order Manager	36
Work Lists	38
Templates	44
Creating a New Template	45
Applying a Template	46
What Can You Do with ProForm?	46
ProForm Start Page Overview.....	47
ProForm Search Page.....	51
Formula Editor	51
Lookup Tables	54
Auto-Lookup Method for Retrieving Lookup Entries.....	55
Resolving Field Codes and Formulas.....	56

Using F2 in a Key Field	57
Filtering Entries.....	57
Adding Lookup Entries.....	60
Editing Lookup Entries	61
Updating Entries Using Insert Entry.....	61
Deleting Lookup Entries.....	62
Duplicate Entries.....	62
Cascading Entries	63
Using Prompts in Lookups	63
Express Order Entry	63
Order Information.....	66
Status	67
Property	69
Notary & Acknowledgment	73
Deed.....	74
Adding a Deed.....	76
Deleting a Deed	76
Affidavit.....	77
Invoice.....	77
Register	79
Adding Property.....	83
Viewing Properties.....	83
Deleting Property.....	84
Requested Tasks	85
Working with Multiple Properties	86
Order Notes	87
Searching for a Note	88
Attachments	89
Adding Attachments	92
Loan Charges (800)	93
Loan Funding Summary	95
Loan Information & Funding Overview	96
Loan Information & Funding.....	97
Loan Terms & Payments	99
Title Screens Overview	102
Title Legal Description	102
Preliminary Title Search & Opinion.....	103
Existing Liens.....	106

Title Insurance Premiums	109
Default Splits.....	116
Commitment - Schedule A.....	117
Adding a Commitment.....	120
Commitment - Schedules B1, B2	120
Adding Requirements or Exceptions	121
Importing Requirements and Exceptions	125
Numbering Requirements and Exceptions	126
Deleting Requirements and Exceptions.....	126
Commitment for Title Insurance (Schedule D)	127
Final Title Opinion.....	128
Policy - Schedule A.....	129
Policy - Schedules B1, B2	130
Endorsements.....	132
Additional Title Charges.....	134
Escrow/Closing Screens Overview	135
City/Town Taxes.....	136
County Taxes.....	138
Assessments.....	145
Additional Taxes.....	151
Express HUD, Page 1	157
Express HUD, Page 2	157
Express HUD-1, Page 3.....	158
Commissions (700).....	160
Loan Charges (800)	164
Prepaid Loan Charges (900).....	166
Escrows (1000).....	168
Title Charges (1100).....	169
Recording Charges (1200).....	171
Additional Charges (1300)	174
Disbursements to Others (1500)	175
Buyer/Borrower Debits (100)	176
Buyer/Borrower Credits (200)	176
Seller Debits (500).....	177
Seller Credits (400).....	178
Order Transactions	179
Order Balance	182
Policy Instructions.....	183

HUD Line Grid	185
Escrow Instructions.....	186
Rent Schedule Overview	190
Rent Schedule	191
Adding a Rent Schedule	193
Prorating Rent.....	194
Escrow Agreement.....	194
Seller Proceeds and 1099-S	195
HOA Charges and Prorations	197
Options.....	198
Task Summary Overview	204
Checklist Tasks Overview	205
Checklist Tasks	205
Adding a Checklist Task.....	207
Requested Tasks	207
Adding a Requested Task.....	208
Editing a Requested Task.....	209
Deleting a Requested Task.....	209
Order Contacts.....	209
Contact Details.....	210
Adding an Order Contact	216
Deleting an Order Contact.....	217
Emailing Order Contacts	218
Formula Editor	219
Documents.....	222
View Ribbon.....	223
Edit Ribbon.....	224
Print Preview.....	225
Distributing Documents.....	226
Saving Documents	228
Printing Documents	232
Emailing Documents	233
Licensing	237
SoftPro Sales	238
SoftPro Solution Center	238

SoftPro Select Overview

SoftPro Select is the most complete office solution for the real estate and title industries. See [what you can do](#) with SoftPro Select and [inquire](#) today about switching to Select from SoftPro Standard/Enterprise Editions.

The SoftPro Select family of products offer solutions at each level of your needs:

ProForm

ProForm is the leader in title insurance order and closing automation. Enter order data to produce professional closing and title insurance forms. Manage order tasks and run reports to track your business. Customize screens for your workflow.

ProTrust

ProTrust is the choice for trust account management and reconciliation. Works seamlessly with your ProForm data. Print daily and monthly reports according to your criteria.

Pro1099

With Pro1099, your 1099-S filing is now automated. Pro1099 will produce your yearly IRS 1099-S submission file using the data you enter once in ProForm.

SPImage

SPImage enables you to scan documents and associate them with your ProForm orders — making it easy to view images, archive complete files and retrieve when needed.

SPAdmin

SPAdmin is the security module of SoftPro .NET. With it, you manage SoftPro users and their permissions, adjust global program preferences, and create Lookup tables.

Resources

Online

- SoftPro Select on the Internet: www.softprocorp.com
- mySoftPro login: www.softprocorp.com/mySoftPro/mySoftProLogin.asp
- Register with mySoftPro to access the support knowledge base, document downloads, and more.

Support

- [SoftPro Solution Center](#)
- **(800) 848-0143**
- Monday to Friday from 8:00 A.M. to 5:30 P.M. EST
- Platinum-level support hours: Monday to Friday from 8:00 A.M. to 10:00 P.M. EST, Saturday 11:00 A.M. to 2:00 P.M. EST

Sales

- Call your SoftPro representative to register for platinum support service or inquire about products
- [SoftPro Select Sales](#)
- **(800) 848-0143**
- Monday to Friday from 8:30 A.M. to 5:30 P.M. EST
- sales@softprocorp.com

User Logins

Users can be set up in SPAdmin with a choice of log in types: **Windows** or **Custom**. Custom logins are not required, but can provide another layer of security and account flexibility.

Windows Login

SoftPro Select user authentication occurs when the user logs onto Windows. No additional password is required to access SoftPro Select.

Custom Login

1. In order to access SoftPro Select for the first time, users will be required to create a new password. Upon opening SoftPro Select, the Login dialog appears.



2. Enter the user name. Click **Create**.
3. The **Create New Password** dialog appears. Enter the new password in the **New password field**. Reenter it in the **Retype password field**.
4. Click **OK**. The new password will now be associated with the user name.



5. To change the password at a later time, press **Change** when logging in to SoftPro Select. You will then be prompted to create a new password.



Using SoftPro Select Help

There are several ways to find what you are looking for:

- Click the **Contents** tab to browse for a topic.
- Click the **Index** tab to search for a topic.
- Click the **Search** tab to search the help system for a keyword.
- Click links and **Related Topics** buttons to navigate to other topics.
- Click **Hide/Show** to hide or show the Table of Contents pane. By default, when you click back to the application with SoftPro Select Help open, the Table of Contents pane will hide. Click back on the help window to show the Table of Contents pane.
- To minimize the help window, click on it to show the Table of Contents pane and then click the minimize button.

SoftPro Select Context-Sensitive Help

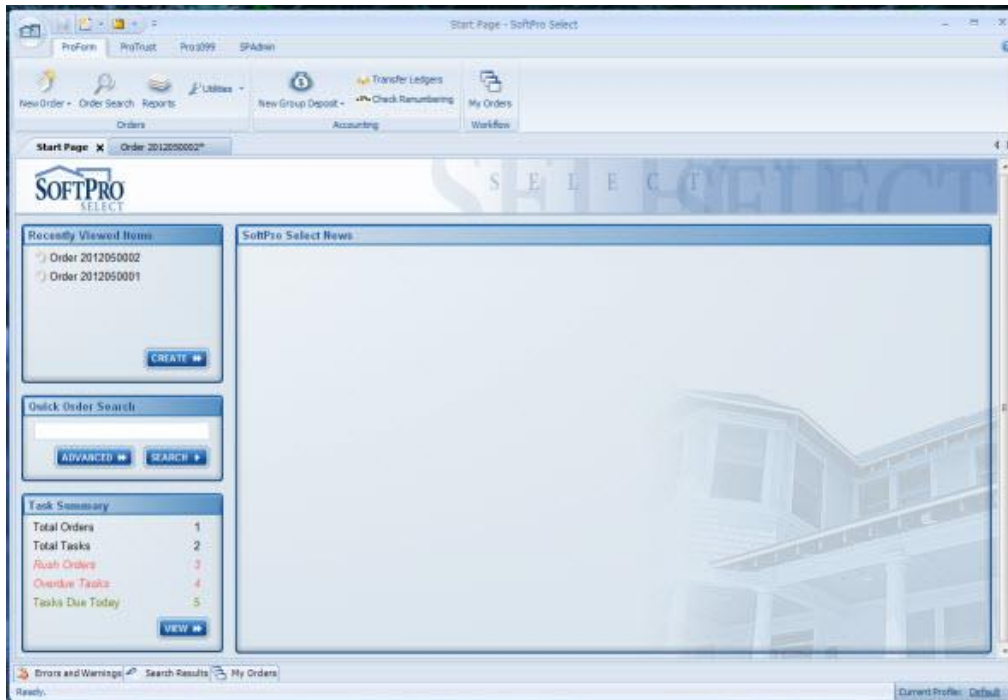
Press **F1** to get help for the currently selected field or dialog. Or, click **Help**, then **Current Selection** on the menu.

SoftPro Select Solution Center

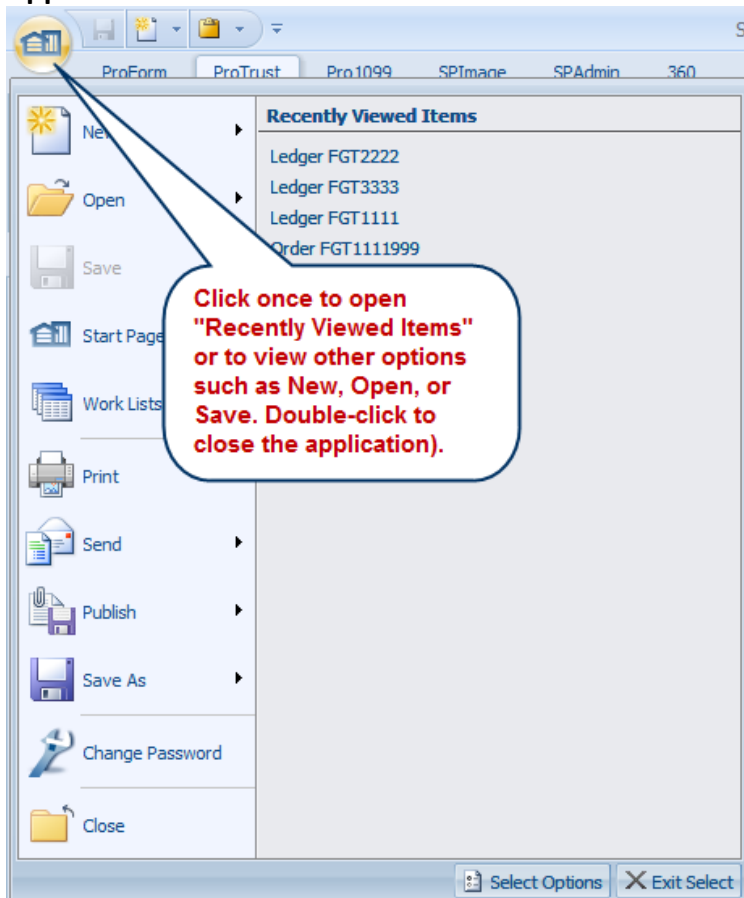
Call (800) 848-0143 to contact the SoftPro Select Solution Center. See [SoftPro Solution Center](#) for more information.

ProForm Start Page Overview

When ProForm is launched, the **ProForm Start Page** provides a starting point to conduct common actions (for example, opening an order, creating a new order, searching for orders, etc.) and a summary of assigned orders and/or tasks to be worked on.

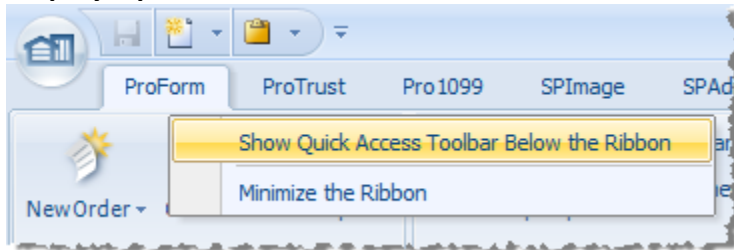


Application Button



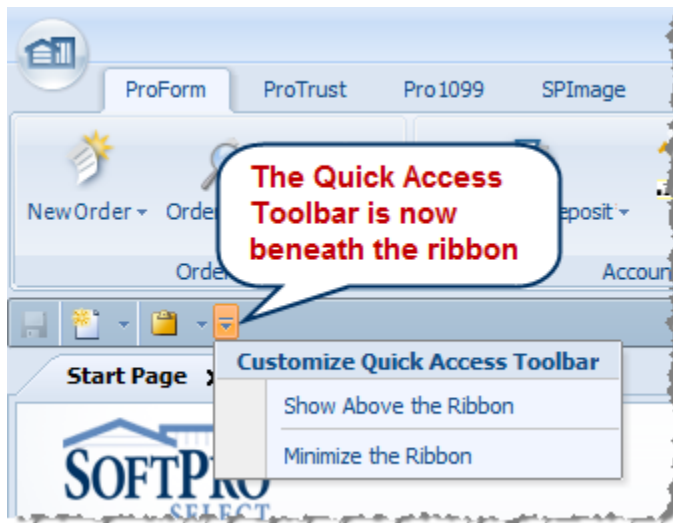
Clicking the application button once displays the following options: **New, Open, Save, Start Page, Print, Change Password, Close and Recently Viewed Items**. Double-clicking the application button closes SoftPro Select. The Recently Viewed Items list displays recently opened ProForm orders & templates, ProTrust ledgers and Pro1099 records.

Display Options

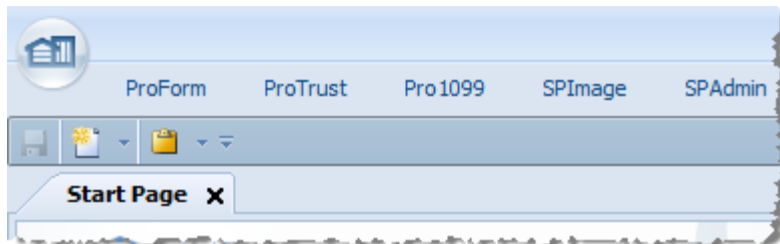


Right-click anywhere in the “ribbon” (the big blue bar) to customize the view. Options include:

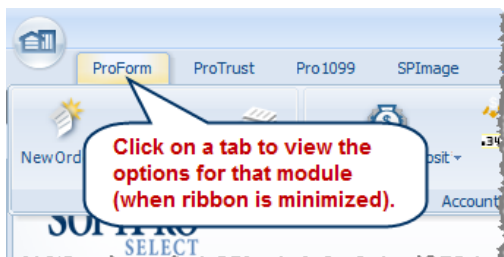
- displaying the **Quick Access Toolbar** (the bar that displays the **Save**, **New** and **Paste** icons) below the ribbon,



- or minimizing the ribbon.



To view the ribbon again, click on one of the tabs to view the ribbon for that module,



or right-click again and un-check “**Minimize the Ribbon**”.

Profile View

The current profile now displays at the bottom right-hand corner of the screen. If you are associated with multiple profiles, click on the profile hyperlink to change profiles. Prior to changing profiles all active tabs must be closed. For example, close all open Orders or Ledgers.

Current Profile: [Default](#)

Quick Order Search



The image shows a 'Quick Order Search' dialog box. It has a title bar with the text 'Quick Order Search'. Below the title bar is a search input field. At the bottom of the dialog, there are two buttons: 'ADVANCED' with a right-pointing arrow and 'SEARCH' with a right-pointing arrow.

To search for an order, enter search information in the **Quick Order Search** field. The search engine searches through buyer name, seller name, lender name, order number, property address and settlement date fields simultaneously. **The asterisk * wildcard** is allowed and is beneficial when searching for orders, narrowing search results, or when only partial names are known.

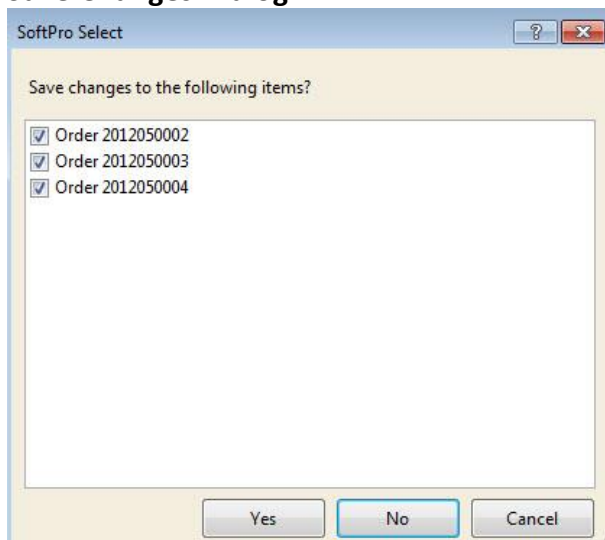
Search Results Bar

Until performing a search in Pro1099, ProForm or ProTrust, the **Show results from** field is blank. Once a search is performed, the **Show results from** field defaults to the last item searched for. For example, perform a search in ProForm Orders and ProTrust Ledgers, and they display in the Show results from field. Filter the search results in the Search Results bar. To filter the results, select one of the options from the list. The results display in the grid below.



The image shows a 'Search Results' bar. It has a title bar with the text 'Search Results'. Below the title bar, there is a dropdown menu labeled 'Show results from:' with 'ProTrust Ledgers' selected. Below the dropdown, there is a list of search results: 'Search Results: 9 re', 'ProForm Orders', and 'ProTrust Ledgers'. The 'ProTrust Ledgers' item is highlighted in yellow. Below the list, there is a 'Ledger' label.

Save Changes Dialog



The image shows a 'Save Changes Dialog' box. It has a title bar with the text 'SoftPro Select'. Below the title bar, there is a question mark icon and a close button. The main area of the dialog contains the text 'Save changes to the following items?'. Below this text, there is a list of items with checkboxes: 'Order 2012050002', 'Order 2012050003', and 'Order 2012050004'. All three checkboxes are checked. At the bottom of the dialog, there are three buttons: 'Yes', 'No', and 'Cancel'.

If more than one order, ledger or 1099 record is open and the user tries to close SoftPro Select, the Save Changes dialog prompts the user to save changes before closing the application. Check the orders to save and click **Yes**. Click **No** to close SoftPro Select without saving the items displayed in the dialog. Click **Cancel** to continue working in SoftPro Select.

If attempting to save an order or 1099 record that contains warnings, the dialog prompts you to view the warnings. Click **Yes** to view the warnings or **No** to close the application without viewing the warnings.

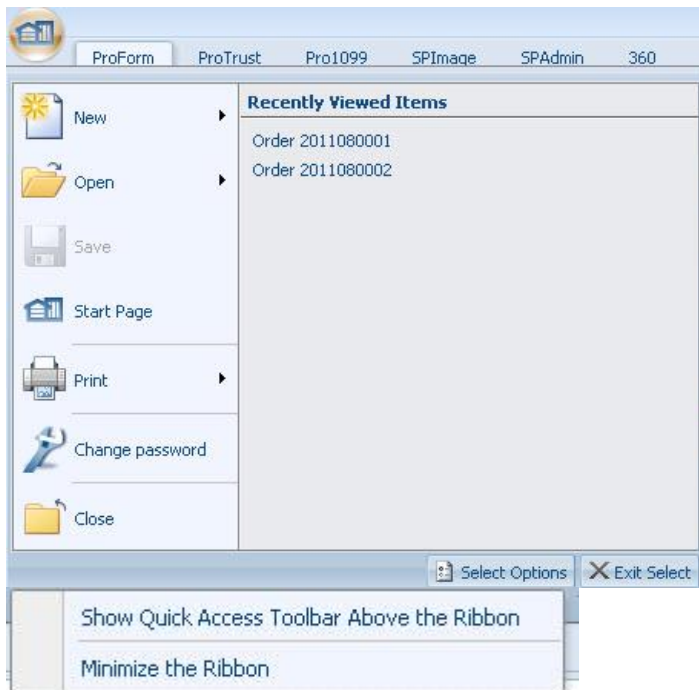
Getting Around SoftPro

This is a guide to the SoftPro Select desktop. It will help you become accustomed to the SoftPro Select layout and help you to understand how to access features and screens throughout SoftPro.

Menus and Toolbars

The menus and toolbars provide access to SoftPro Select features.

FILE OPTIONS



This is the **application button**.

Double-click the application button to exit SoftPro Select.

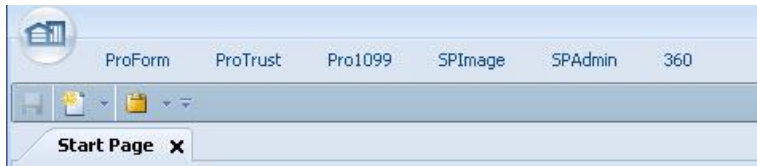
Clicking the application button once displays the following options: **New, Open, Save, Start Page, Print, Close and Recently Viewed Items**.

Double-clicking the application button closes SoftPro Select.

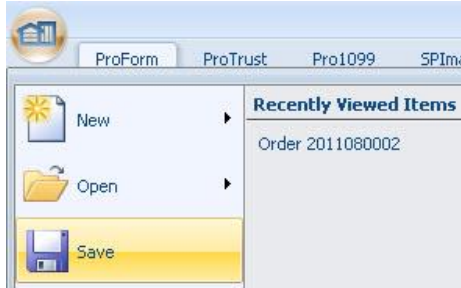
You can right-click anywhere in the "ribbon" (the big blue bar) to customize the view.

Options include:

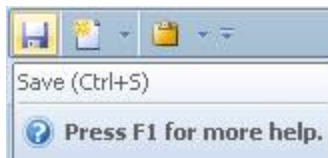
- Displaying the Quick Access Toolbar (the bar that displays the Save, New and Paste icons) below the ribbon,



- or minimizing the ribbon.



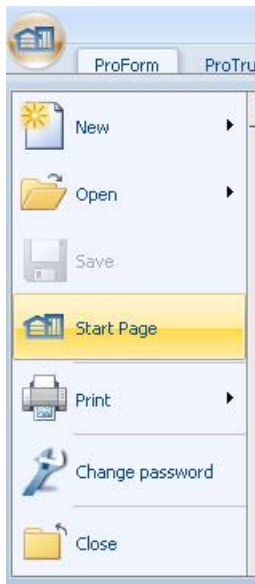
You can save an order two different ways,
Click the application button, then click **Save**,



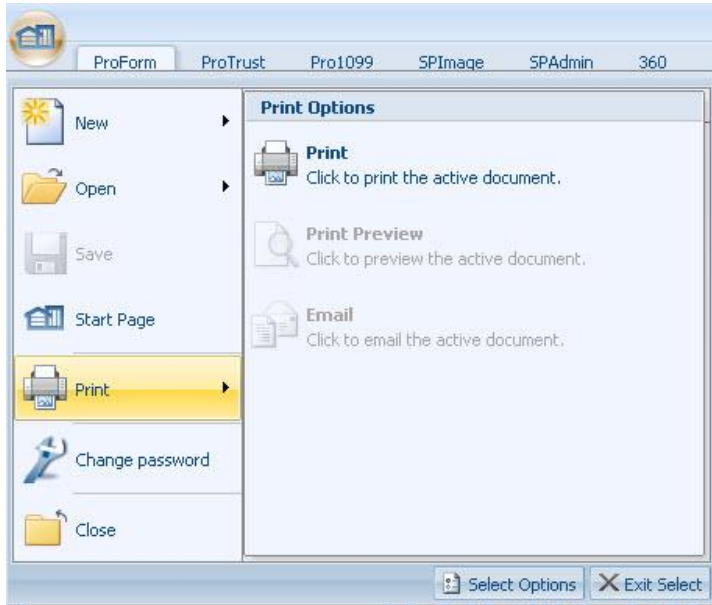
or click the **Save** icon on the toolbar.



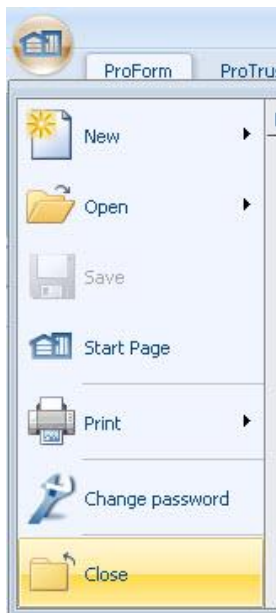
A progress bar at the bottom of the screen
indicates that the item is being saved.



Click the application button then **Start Page**
to open the start page.



Click the application button the **Print** for printing options.



Click the application button the **Close** to close an order.

EDIT OPTIONS



Click the clipboard button to use the editing options **Paste, Cut, Copy** and **Clear**.

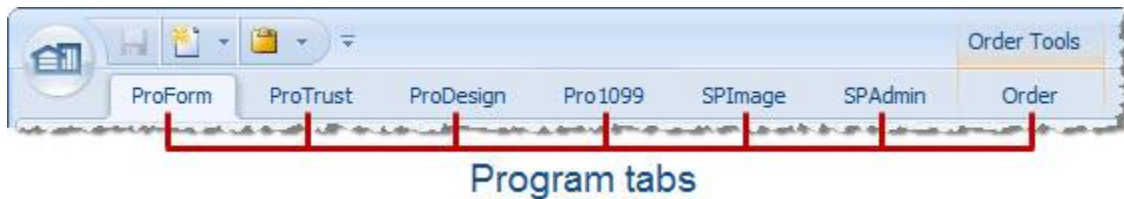
PROFILES



See [Changing Profiles](#)

Program Tabs

By default, ProForm will open and the [ProForm Start Page](#) appears on the desktop. Click [Program Tabs](#) to switch to other programs (ProTrust, Pro1099, ProIndx, ProDesign, or SPAdmin).



Action Icons

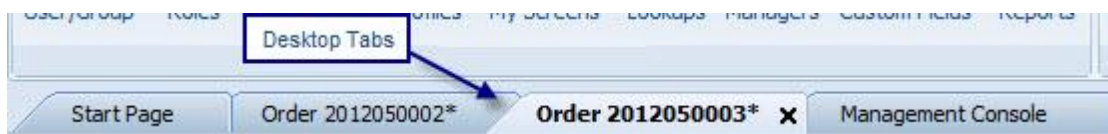
Below the Program Tabs is a row of Action icons. These will change depending on the Program Tab that is selected. Use the Action icons to access program features, like Reports and Group Deposits in ProForm. In SPAdmin, Action icons guide you to different areas of the Administrator.

When clicking an Action icon, a tab opens on the desktop. Several tabs may be open on the desktop for different orders, ledgers, or Action Icon features.



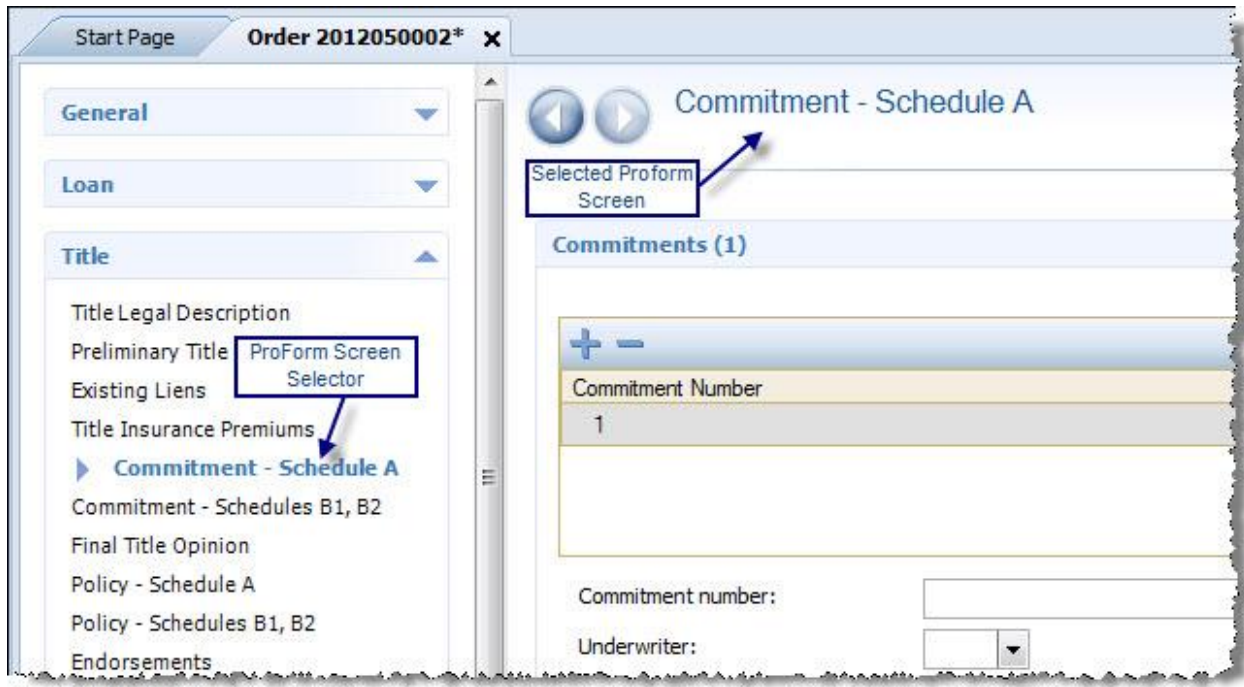
Desktop Tabs

When opening an order, clicking Reports or Group Deposits, or opening the Transfer Ledger Register, a tab appears on the desktop. Switch between orders in ProForm using the [Desktop Tabs](#).

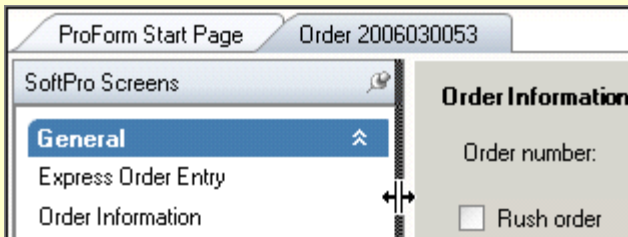


ProForm Screen Selector

When opening a ProForm order, the Screen Selector appears along the left side of the desktop. Select the screen to open using the Screen Selector. Screens are organized into General, Order Tasks, Title, and HUD-1 groups. Click group headings to show/hide screen lists. After selecting a screen, it opens on the desktop.



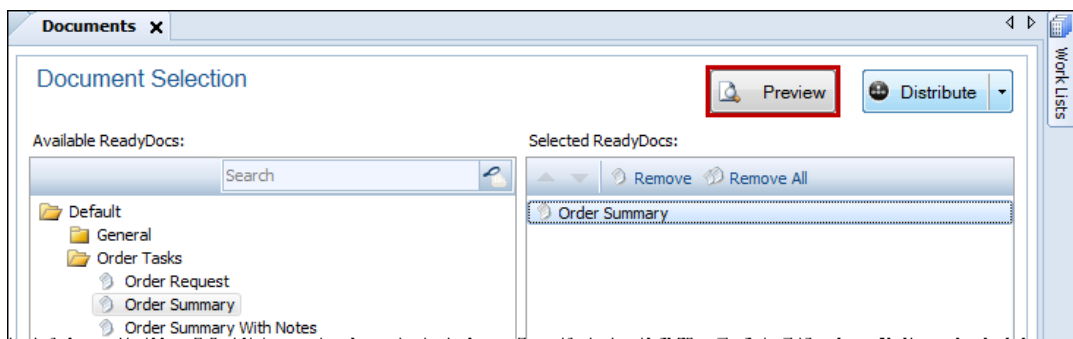
Tip: Resize the Screen Selector Pane by dragging its right border.



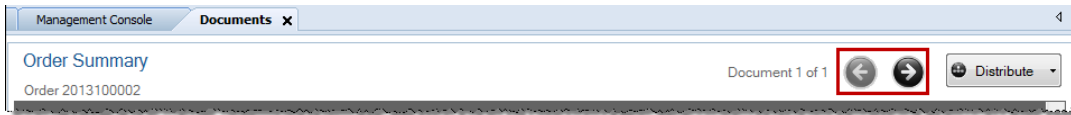
Print Preview

View an example of a document before you print, e-mail or save it. To access the Print Preview function:

1. From the **ProForm Order Tab**, select **Documents**.
2. From the **Available ReadyDocs** tree, select a document to preview.
3. Drag the document from the Available ReadyDocs pane to the **Selected ReadyDocs** pane.
4. Click the **Preview** button.



5. Click the **Forward** and **Backward** buttons to navigate document Preview.



GoTo






To go to a specific field in a specific screen in SoftPro Select, press **F6**. This opens the **GoTo** dialog. Search for a field by entering field codes (not case-sensitive, but spelling must be accurate). Enter the complete field code. Click **Go**. SoftPro Select goes to the corresponding field (as shown in the following image). **Note:** You cannot select a field, then press **F6** to view the field code. Refer to the Field Code Browser for accurate field codes. Users can also go to a specific field by selecting a field in the Field Code Browser; then double-clicking on it to go to the corresponding field in the browser.

Subscripts

For example if an order has 5 loans, users can jump to the 4th loan's amount by entering Order.Loan[4].LoanAmount. However, if that particular instance of the object does not exist, i.e., using Order.Loan[4].LoanAmount when there are only 2 loans, GoTo takes the user to the first instance. It does not display an error message.

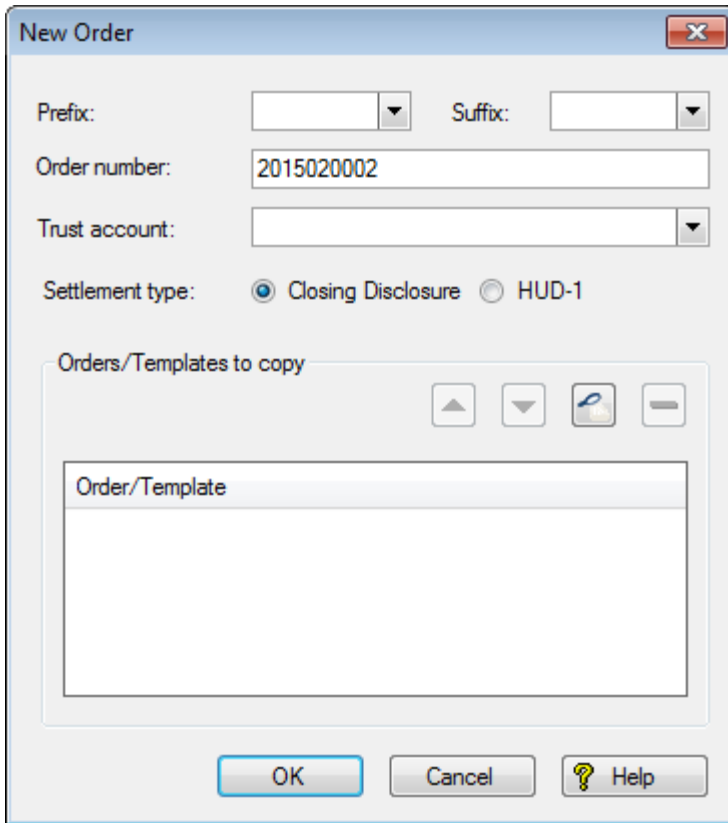
This also works for custom fields (which require the pound sign #). Users can also apply the hotspot xml file, "HotSpotOverrides.xml" which is editable -- enabling users to re-direct a hotspot and override screens and fields.

Create New Item Menu

	New Order	Create a new order. See Creating a New Order.	<u>CTRL+N</u>
	Reserve Order Numbers	Reserve Order Numbers. See Reserving Orders.	<u>CTRL+SHIFT+R</u>
	New Template	Create a new template. See Creating a New Template.	<u>CTRL+T</u>
	New Ledger	Create a new ledger. See Creating a New Ledger.	
	New 1099 Record	Create a new 1099 record. See Adding a New Record.	


Creating a New Order

1. Click **ProForm**, **New Order** then select **New Order**. The New Order dialog appears.





2. Select a **Prefix** and **Suffix** if required.
3. Enter a **Trust account**.
4. (Optional) To copy information from an existing order or template, click the **Search** button. See **Searching for an Order/Template to Copy** below for more. Users can copy multiple orders and templates.
5. Click **OK**.

Searching for an Order/Template to Copy

1. Click **Search** on the **New Order** dialog. 
2. Enter search criteria on the **Order Search** screen.
3. Click **Search**.
4. Select the order or template to copy on the **Search Results** screen (Select multiple orders using the **Ctrl** or **Shift** keys).
5. Click **OK**. The selected items appear on the **New Order** dialog.

Copying Multiple Orders/Templates

Orders and templates are copied in the order in which they appear in the **Order/Templates** list. Use the buttons to move items up/down the list, search for additional items to copy, or delete items from the list.

	Move selected item up the list
	Move selected item down the list



Search for orders/templates to copy



Delete selected items from the list

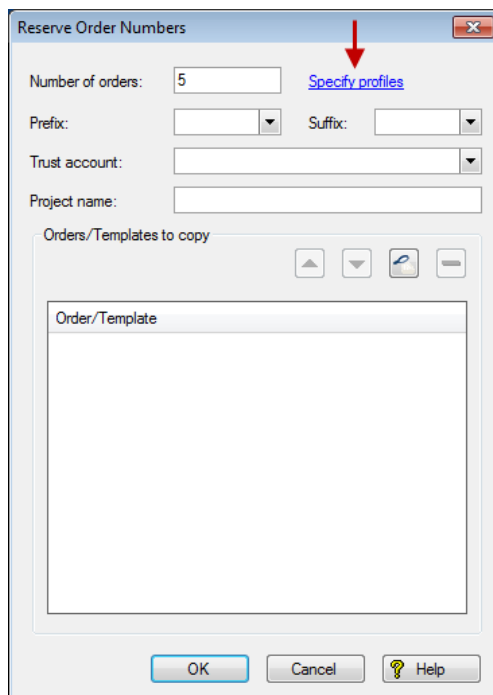
Reserving Orders

Users can reserve orders if granted permission to add orders and if currently using a profile with an "Auto" order number profile manager type where the order is auto-generated. (In other words, users cannot reserve orders if manually entering each order number).

1. Click **ProForm, New Order**, then select the **Reserve Order Numbers** from the drop-down menu (or press **Ctrl+Shift+R**).
2. The **Reserve Order Numbers** dialog appears. Enter the number of orders to reserve.
3. Select a prefix and suffix if required.
4. Enter a **trust account** (optional).
5. Enter a **project name** (optional), for example, Highgate Apartments, Seaside Condos, etc.
6. To copy information from an existing order or template, press **Search**. Multiple orders and templates may be copied.
7. Click **Yes** to reserve orders, click **No** to discontinue the process. Select **Yes** and the reserved orders are created.

Specifying Profiles

Users can reserve orders in other profiles. If granted access to only one profile, the Specify Profiles link will not be available. **If granted access to multiple profiles**, the Specify profiles link will be activated when the user inputs a number into the **Number of orders field**:



1. Click **Specify Profiles**. The Specify Profiles dialog opens.

Specify Profiles

Total number of orders: 5

Profiles	Orders
Default	1
Default\Northeast	1
Default\Northwest	1
Default\Southeast	1
Default\Southwest	1
»*	0

Total orders specified: 5

Remaining orders: 0

OK Cancel Help

2. The **Total number of orders** indicates the amount of orders you created in the **Reserve Orders** dialog.
3. By default, there is one row in the grid. In this row, the profile is the logged in profile's orders created as profile. Orders are the same as the total number of orders.
4. Click **OK** to specify profiles and return to the Reserve Orders dialog.
Note: Press **OK** only when the total orders specified is equal to the total number of orders. Remaining orders must equal 0.

The total orders specified indicates the sum of the orders entered in the grid. The remaining orders field indicates the difference between the total number of orders and the total orders specified. If the remaining amount of orders is a positive number, increase the number of orders specified in the grid. If the remaining amount of orders is a negative number, decrease the number of orders specified in the grid.

Searching for Reserved Orders

To search for and create a reserved order,

1. From the **ProForm** search screen, under the **Order information** bar, check the **Reserved** check box.

Search for:

Orders

Templates

Reserved

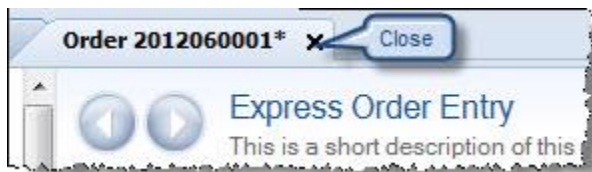
2. Users can also search by "**Order reserved dates**" or "**Project name**". Enter search information in the desired fields.
3. Click **OK**. Search results display.
4. Double-click on the reserved order. The **Create Order Number** dialog appears. Users can also highlight multiple reserved orders from the search results and select **Open** from the right-click menu. A Create Order Number dialog will appear for each reserved order.
5. Enter a trust account (if the profile requires a trust account code) to continue. To edit templates in the Create Order dialog, the user must be granted the "Templates to copy for reserved orders" permission. Click **OK** to continue.
6. Once saved, the order is no longer considered a reserved order.

Notes:

- Changes made to templates also apply to reserved orders.
- Reserved order cannot be overlaid.
- The report "**Reserve Order Numbers**" lists reserved orders.

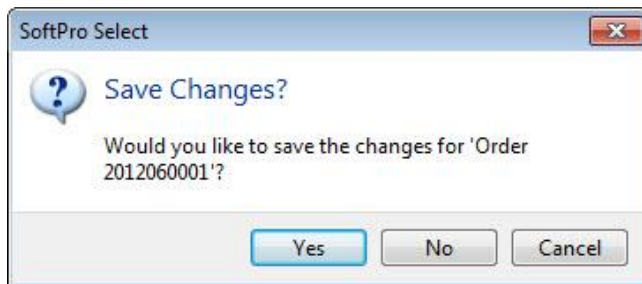
Closing an Order

1. To close the current order, click **File>Close**. Or, click the **Close** button.



Note: A prompt to save changes appears when closing an order.

2. Click **Yes** to save the most current changes and close the order.



Overlaying an Order

Users can overlay an order or template after an order has been created. To overlay:

1. From an open order, press **Overlay Order** on the Order ribbon. The Overlay Order dialog appears.

2. Click the **Search icon** to open the **Order Search** screen.
3. Users can search for other Select **Orders** or **Templates** to overlay. Input any desired filter data into the Order Search dialog and click Search to locate an order to overlay.

4. Select the desired order from the Search Results and click **OK**.
5. Under **Overlay Options**, select any areas of the order to overlay.

6. Click **OK**.

Searching for an Order

The main search is executed from the **ProForm Search** screen. From this screen, users can search for orders, templates, or reserved orders using a variety of different fields.

1. Enter search criteria into the appropriate [fields](#). Certain [wildcard](#) characters can be used in all fields except date and combo-box fields, although this is not required.
2. If a "beginning date" is entered in the date fields (ex. settlement date) but no end date, the system searches for all orders beginning with the entered date through all existing orders after

that date. For example, if a settlement date of 5/01/07 is entered, any orders with a settlement date of 5/01/07 and after appear in the results.

3. Conversely, if a "through date" is entered in the date fields but no beginning date, the system finds all orders matching the "end date" and all others before the end date. For example, enter a "through" date in the "order received" field, but no beginning date, and the program searches for any order with a received date of 5/01/07 and before 5/01/07.
4. Click **Search**.

Wildcards

The **asterisk (*)** and the **hyphen (-)** are the only wildcards available for search. Although wildcards are not necessary for search, it is possible to use these to narrow results.

The **asterisk** can be included immediately before or after a search term to represent unknown characters. For example:

- Searching **Rom*** would find records that contain a buyer name beginning with that letter combination, followed by any other letters. Possible results could include: **Romero, Romano, Roman, Romesburg**, etc.
- Searching ***son** would bring up results that end with **son**, such as : **Branson, Roberson, Gregson, Pearson**, etc.
- Simply searching for **mer** with no asterisk wildcard would yield a broader list of results. The search engine will interpret as "contains the letters **mer**" and bring up results that contain items that begin OR end with **mer**, such as: **Merkel, Merchant, Merrimon, Farmer, Beemer, Mortimer**, etc.

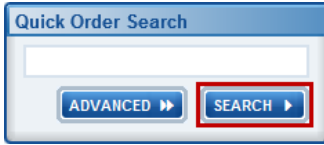
The **hyphen** input into a search field is treated like a space. This use of a hyphen as a "word separator" works as follows:

- Searching for **6018-mgh** is the same as searching for **6018 mgh**.
- Searching for **401** will pull up order number **SEA-213401-MM**.
 - Although **401** is in the middle of the order number above, it falls directly before a hyphen, and thus is considered the end of a word and can be searched for.
 - You could search for **213** and get the same order number, as these digits come directly after a hyphen.

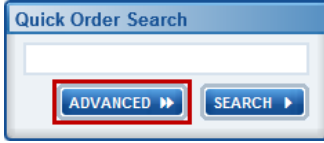
Search options

There are several places in ProForm where you might use the **asterisk** or **hyphen** wildcard characters to provide enhanced search results.

- **Quick Search** - Found on the left hand side of the **Start Page**. Although you don't have to use wildcards, since they are implied in the search itself, you may use a wild card at the beginning or ending of your search query. Quick Search searches the following fields: *Order Number, Address1* on all properties, and *Name* on all contacts:



- **Advanced Search** - Found on the left hand side of the start page. This button leads to the [ProForm Search](#) screen:



- **ProForm Search** - Accessed via the **New Order**, **Reserve Order Numbers**, **New Template**, **Order Search**, **Overlay Order**, and **Apply Template** options. Similar to the Quick search option, you don't have to use wildcards, since they are implied in the search itself. You may use a wildcard at the beginning or ending of your search query here, which allows for the searching of [many more fields](#) than the Quick Search option.

Order Information

Order #: Who has the file: Search for:

Settlement date: (None) through (None) Order status: Orders

Order reserved: (None) through (None) Escrow status: Templates

Order received: (None) through (None) Title status: Reserved

Order completed: (None) through (None) Loan #:

Project name: Mtg. ins. case #:

Property Information

Address:

City/State/Zip: Foreign

County:

APN/Parcel ID:

Lot: Subdivision/Tract:

Block: Section: Unit:

Tax/Map ID: Phase: Building:

Brief legal desc:

Book:

Page:

Map reference:

Recorded: (None) through (None)

Title Information

Policy #: Commitment #:

Contact Information

Contact type:

Code: Reference #:

Name: Payee name:

First name: Last name:

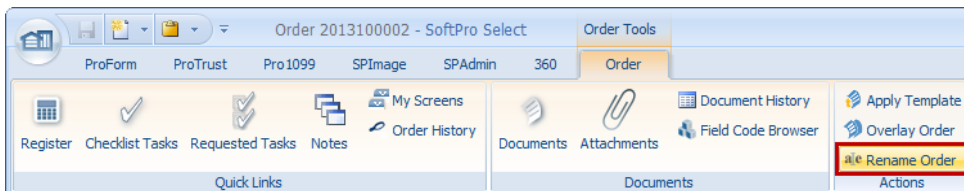
Renaming an Order

Users can rename an order if granted permission.

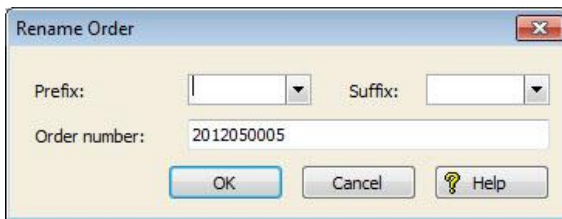
- If **Auto generate order number** is selected, the **Order number** text box will be pre-populated with the next available order number.
- If Auto generate order number is not selected, the Order number text box will be pre-populated with the current order number. As with the **New Order** dialog, the user will be limited to a 30-character order number, including any prefix or suffix selected.

To rename an order:

1. Click **Rename Order** on the Order tab



2. The **Rename Order** dialogue appears

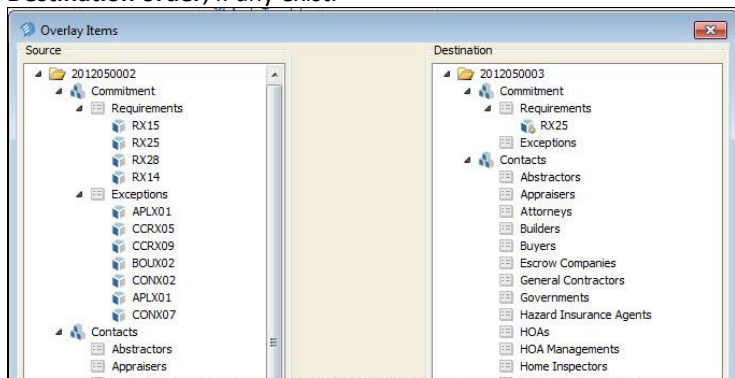


3. Enter any applicable changes.
4. Click **OK** to save.

Overlaying Requirements and Exceptions

Users can select from a list of requirements or exceptions and overlay them into an order. From an open order, press **Overlay Order** on the ribbon. Select or search for an order to overlay.

The Overlay Requirements or Exceptions displays as part of the Overlay Items dialogue as two tree views - the requirements and/or exceptions from the **Source order**, and the requirements and/or exceptions from the **Destination order**, if any exist.



You can drag and drop (or press **Add**) the following from the Source order tree to the Destination order tree:

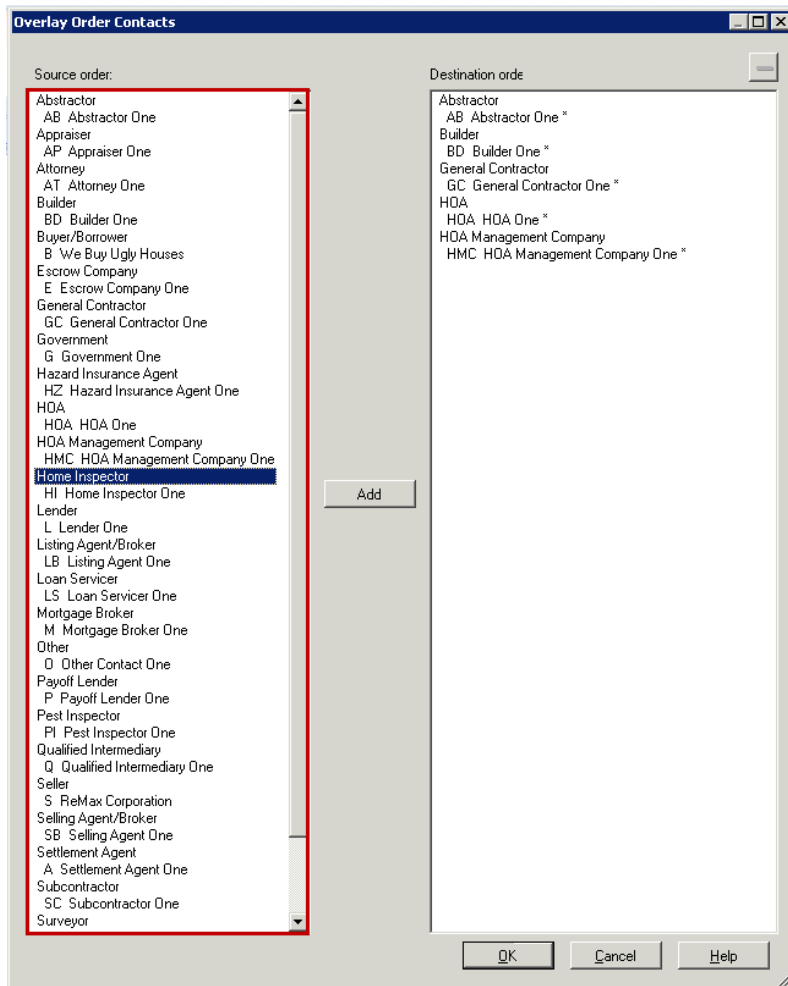
- individual items,
- all items related to a commitment by selecting the **Commitment** node,
- all items related to requirements by selecting the **Requirements** node,
- or all items related to exceptions by selecting the **Exceptions** node.

When dragging a parent requirement and/or exception, all associated requirements and/or exceptions are included. Items drop as indented onto whatever node users position them. If dropped directly on the Commitment, Exceptions, or Requirements nodes, the items append to the end of the applicable list.

Requirements can be dragged and dropped into the exceptions node and vice versa.

In the Destination order tree, reposition the requirements and/or exceptions using the move buttons or remove them if needed. Duplicates are allowed. Numbering reflects the numbering established for the destination order and is updated immediately within the tree. When completed, press **OK**, and the order is overlaid, writing in the requirements and/or exceptions as you determined in your destination order tree. The overlay process also takes into account the “**Include on Loan Policy**” or “**Owner’s Policy**” states.

Overlaying Order Contacts



Users can select from a list of order contacts and overlay them into an order. From an open order, press **Overlay Order** on the ribbon. Select or search for an order to overlay. Select **Order Contacts**. The **Overlay Order Contacts** dialog displays two list views:

1. Order contacts from the source order
2. Order contacts from the destination folder (if any exist)

These list views contain order contact types, codes and names. All Order contacts are available for overlay. In addition to drag and drop ability, the **Overlay Order Contacts** dialog includes an **Add** button. To add a contact, select it in the **Source order** and then click **Add**. This adds the selection as a new contact on the **Destination order**. To delete a contact in the Destination order, select it in the Destination order, then either use the keyboard Delete key or right-click and select the remove option.

Select more than one contact by pressing **SHIFT+CLICK** or **CTRL+CLICK**. Drag and drop the contacts anywhere in the destination order list view; the contact displays at the bottom of list for the applicable contact type with the appropriate contact code assigned.

Replace an existing order contact in the destination order by dropping an order contact directly onto another contact. If the order contact type matches, a prompt appears to confirm the replacement of the existing contact or insert a new contact. You can only replace an existing contact if there are no **“posted transactions”** or **“sent invoices”** associated with the contact.

New contacts display in the destination order list view with an asterisk (*) to indicate they are new. New contacts can only be removed from the destination order's list view.

When overlaying order contacts, the new contacts (along with their data values and associated people) are appended in the destination order. When replacing existing contacts, only the data values associated with the contact are updated, with the codes remaining intact. When replacing order contact people, if the people are referenced anywhere in the application (except as a main contact) they are skipped, leaving them in place and the new contacts are appended. A message indicates that the person could not be deleted and what items are referencing the person. If existing order contact people are not referenced they are deleted. Also excluded from the **Order Contacts Overlay** is the **Represents** field associated with Attorneys and Listing/Selling Agent/Brokers.

The Order Contact list views filter contacts based on the related permission - ProForm Order contact (Buyer/Seller) -Add or Edit or Order contact (Non-buyer/seller) - Add or Edit. If all of these permissions are not granted or denied, the Order Contacts checkbox on the **Overlay Order** dialog is disabled. When adding the contact people during overlay, if Non-buyer/seller - Person - Add or Edit is not granted or denied, a message will appear when the overlay is performed, **“Contact people cannot be overlaid because you do not have permission to add people”**.

Press **OK** on the **Overlay Order Contacts** dialog to return to the **Overlay Order** dialog with the Order Contacts. If canceled, the **Overlay Order - Order Contacts** checkbox becomes unchecked and the work will not be saved. Other items may then be overlaid on the **Overlay Order** dialog. Press **OK** to complete the overlay.

To create the list of order contacts to overlay into an order:

1. Select an individual or contact type in the source order list, drag it to the destination order list and drop it or use the **Add** button.
2. Replace existing contacts in the destination order by dragging and dropping a contact of the same type directly on the contact or select the contact in the destination and press the **Add** button.
3. Select a contact and press **Remove** to delete new contacts from the destination order.
4. Click **OK** to return to the **Overlay Order dialog**.
5. In the Overlay Order dialog, click **OK** to complete the overlay.

Workflow

Workflow enables users to track and control tasks and activities throughout the life of an order. With the Workflow manager, users can set up steps for an order from start to finish. Users are assigned to roles, which are then assigned to steps, ensuring that the step is performed according to job function.

Orders can be submitted to a workflow from the Workflow Order Manager or from an order. Once the workflow and steps are assigned, the step appears in the queue based on the role assignment to that step. Once a step is selected, users can perform any activity associated with that step, then submit it to the next step once it has been completed.

My Orders Panel



View Button

Click **View** to open another user's queue. This button is permission-controlled and is unavailable if the appropriate privileges are not granted. When clicked, a list of users will appear. Select the user to view their queue. The queues open as separate tabs in the tab strip. Tabs are named after the user name. Once the user is selected, the queue will remain open until the logged-in user closes it.

Manager Button

Click **Manager** to select orders from the [Workflow Order Manager](#) dialog.

Refresh All Button

This button refreshes the count and data on the active tab and on all other tabs.

Selecting a Step

Steps appear in the workflow queue based on the role assignment in the step. Select and start a step three different ways:

1. Select a step from [My Orders](#) tab.
2. Select a step from the [Queue](#) tabs.
3. Assign a step to a user in the Workflow Order Manager by selecting the order, **Action**, **Submit**, select the **Available Step**, and **Assign to User**.

Add to My Orders Button



1. When a step is selected from the queue and the Add to My Orders button is clicked or the step is assigned in the Workflow Order Manager, all tasks associated with that step are created in the order. This occurs even if there are duplicate tasks entered in the step. (This only occurs the first time the step is assigned to a user.)
2. When tasks are added, the following data is added for the task: the task name is entered in the step, status of Required, Assigned to field contains the user's name, and any due date formulas entered in the step are added.

Note: The **Occurs** field updates when adding tasks based on the due date comparison to the settlement date. All task data is user-entered except for the date fields because a formula is used to populate these fields.

1. Press **Cancel** from the workflow queue to cancel the step from being assigned. Tasks are not added.
2. Tasks are added even if the **order tasks add** permission is not granted.

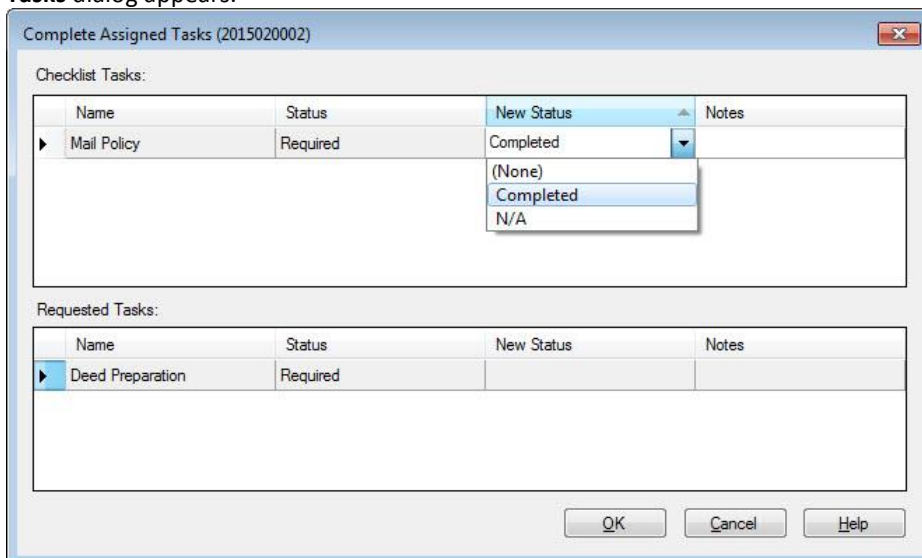
Completing Assigned Tasks

You can use the Complete Assigned Tasks dialog to complete workflow steps. Checklist tasks must be required status, and Requested tasks must be either "Required" or "Requested" status to appear in the Complete Assigned Tasks dialog. Tasks can also be completed when the order status is locked.

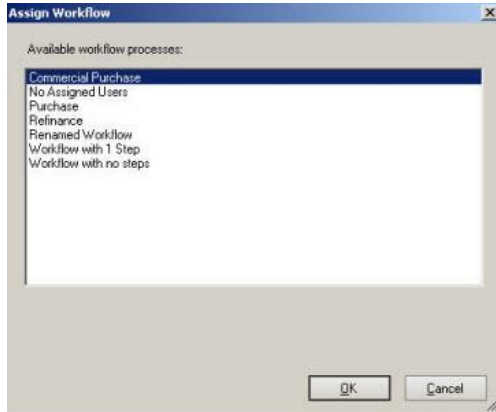
From one of the Queue tabs, highlight an order and click on the **Add to My Orders** button.



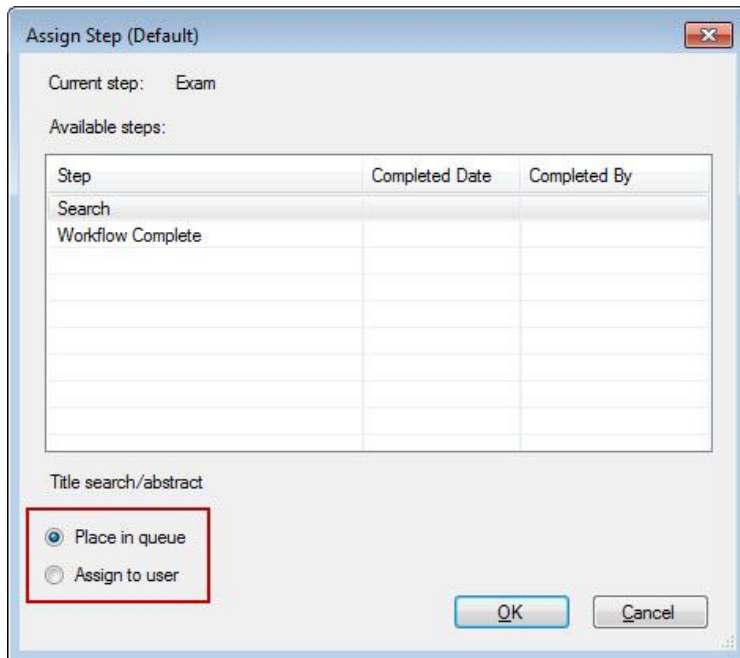
Highlight the order and click **Submit** on the ribbon or the tab on the My Orders pane. The **Complete Assigned Tasks** dialog appears.



Select the tasks you want to submit. Click **OK**. The **Assign Workflow** dialog appears.



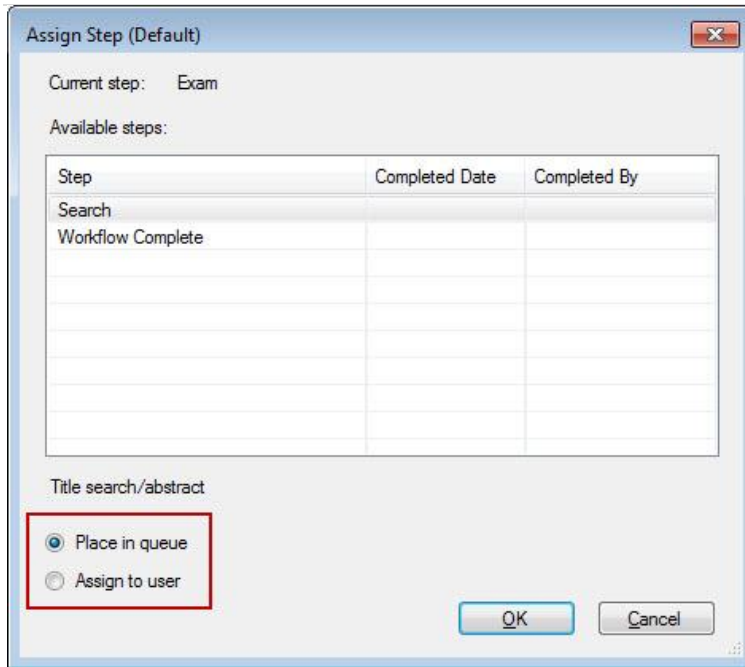
Select a workflow process. Click **OK**. The **Assign Step** dialog appears.



The Assign Step dialog allows you to either assign a step to yourself or assign a step to another user. To assign a step to yourself, click on the **Place in queue** radio button, highlight a step and click **OK**.

To assign a step to another user, click on the **Assign to User** radio button, highlight a step and click **OK**. If you select to assign the step to another user, the workflow will assign the order to that user, create any necessary tasks and assign those tasks to that user.

Assign Step



The Assign Step dialog allows you to either assign a step to yourself or assign a step to another user. To assign a step to yourself, click on the **Place in queue** radio button, highlight a step and click **OK**.

To assign a step to another user, click on the **Assign to User** radio button, highlight a step and click **OK**. If you select to assign the step to another user, the workflow will assign the order to that user, create any necessary tasks and assign those tasks to that user.

My Orders Tab

The tabs on the **ProForm Start Page** represent different user's queues. Users with appropriate permissions may open other users' orders/queues to view and filter the contents.



VIEW BUTTON

Click **View** to open another user's queue. This button is permission-controlled and is unavailable if the appropriate privileges are not granted. When clicked, a list of users will appear. Select the user to view their queue. The queues open as separate tabs in the tab strip. Tabs are named after the user name. Once the user is selected, the queue will remain open until the logged-in user closes it.

MANAGER BUTTON

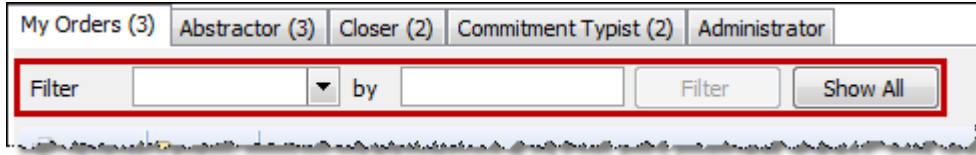
Click **Manager** to select orders from the [Workflow Order Manager](#) dialog.

REFRESH ALL BUTTON

This button refreshes the count and data on the active tab and on all other tabs. **F5** serves as a keyboard shortcut for this functionality.

USING FILTERS

The queue can be filtered to limit which orders are visible. See below for instruction on how to filter the queue. Click **Refresh** to refresh the queue. **Note:** When a filter is active, the Filter button is disabled.



All grids throughout SoftPro Select that contain a filter row at the top have been made more obvious. They are pale yellow and display, "click on this row to filter data by a column".

1. Select an item from the **Filter** drop-down menu, and type/make a selection from the **by** field.
Note: The asterisk * [wildcard](#) may be used.
2. Click the **Filter** button. Orders that meet the criteria specified appear.
3. You may use the **Show All** button to reveal all orders.

SHOW ALL BUTTON

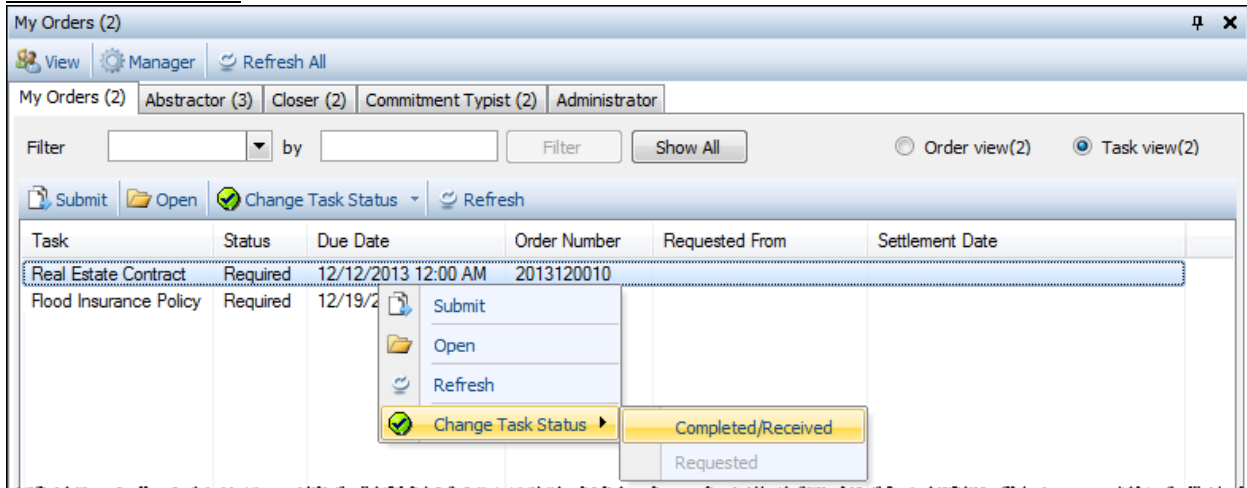
Click the **Show All** button to restore the view of all orders. The **Show All** button is disabled when a filter is not applied, and is enabled when a filter is applied.

ORDER VIEW AND TASK VIEW OPTIONS

The grid has the functionality of toggling between both views.

You can sort orders (Order View option) by **Task Due Date** in order to view the earliest due date of all tasks assigned to a step.

CHANGING TASK STATUS



The order does not have to be open to change the status field on tasks. Change the status of one or more tasks from multiple orders directly in the My Orders grid.

Two options are available on the Change Task Status button and context menu item:

- **Complete/Received:** The Completed/Received option is always available when Change Task Status is available.
- **Requested:** The Requested option is available only when all tasks selected are requested tasks, whether the current status is **Required** or **Requested**. If the current status of any selected task is **Requested**, that task will be ignored since there is no need to update that task.

Once you select one of these options, a message asking for confirmation to change the status appears. Click **Yes** to change the status, **No** to cancel. Select **Yes** and the order updates with the requested task status change. Select **No** and the order does not update.

The ProForm\Order\Order Tasks\Tasks Add or Edit permission must be granted in order for the Change Task Status drop-down button and context menu item to be available.

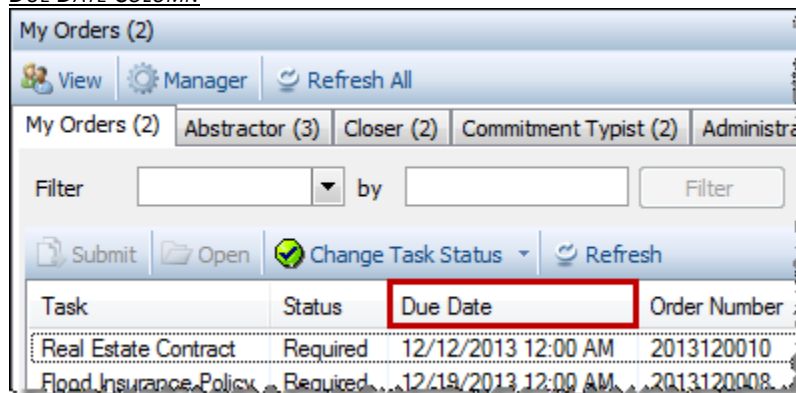
CHANGING TASK STATUS IN READ-ONLY AND LOCKED ORDERS

Once **OK** is clicked to change the task status, SoftPro Select attempts to lock each order. If the lock is successful, SoftPro Select updates the task status, saves the changes, and releases the lock. If the lock cannot be retrieved, a message, **Change Task Status cannot be completed. Order XXX is currently in use by user XXX. The task status for all tasks in this order cannot be changed at this time** displays. Click **OK** and the status is not changed. The message displays the order number in case multiple tasks have been selected in different orders. The message displays once for every order and not once for every task.

If the order is opened, the tasks update.

[Click here](#) for more information on Completing Assigned Tasks.

DUE DATE COLUMN



The Due Date column enables users to sort the column to easily view the earliest due date of assigned tasks.

SUBMIT, OPEN, CHANGE TASK STATUS AND REFRESH BUTTONS



Submit Button

Clicking the Submit button serves several purposes in the workflow process. If there are currently any tasks assigned to users in an order and the submit button is clicked when that order is highlighted in the My Orders grid, the [Complete Assigned Tasks](#) dialog appears. If the selected order is not yet in workflow, the [Assign Workflow](#) dialog appears. The [Assign Step](#) dialog appears if the order has already been submitted to workflow, but just a step is being submitted. A Workflow Complete message appears if the order is in a 1 step workflow and that step is

being submitted. This button is enabled in the ribbon when an order is open and will be disabled when the active tab is not **My Orders**.

Refresh Button

Click the Refresh button to refresh the list of orders and tasks with the current database data. This Refresh button only affects the tab **currently in view** and does not automatically refresh all tabs in the My Orders pane.

Open Button

Click the Open button to open the currently selected order(s) for editing. Double-clicking an order also opens it for editing.

Add to My Orders Button



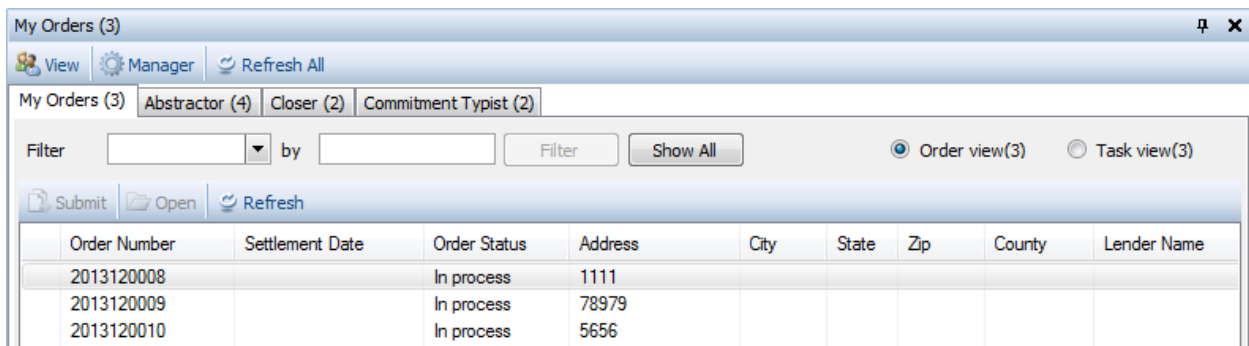
Click the Add to My Orders drop-down to access the following two options:

- **Add to My Orders** - order is removed from queue, assigned to current user and any tasks associated with the current user are created in the order and assigned to the current user.
- **Add to My Orders and Open** - this option functions the same as the Add to My Orders option but will additionally open all selected orders that were successfully added to My Orders.

Note: Orders will not open if they have not been successfully assigned to My Orders for any reason (i.e. another user assigned it to their My Orders first).

Queues

Workflow queues are accessed from tabs in the **My Orders** panel. One tab will display for each role to which the user is assigned. Each tab displays the role name and the count of orders in the workflow queue for that role. The tabs cannot be closed by the user.



These tabs will only appear if:

- The **enable workflow** preference is enabled on the profile level in SPAdmin via **Security\Profiles**, then by selecting the **Other tab** and checking **Enable Workflow**
- The user is granted permission **ProForm\Workflow\workflows** from the tree in SPAdmin, and then selecting the **Profiles** tab.
- The user is a member of the workflow role.

The tabs display orders in the same format as previously shown in the Queue dialog:

Rush	Order Number	Workflow	Step	Date Submitted	Type	Product Type	Settlement Date	Order Status	Escrow Officer
	2013120002	Default	Search	12/05/2013 2:37 PM	Refinance			In process	
	2013120004	Default	Search	12/05/2013 3:33 PM	Refinance			In process	
	2013120009	Default	Search	12/05/2013 3:42 PM	Refinance			In process	
	2013120010	Default	Search	12/05/2013 3:42 PM	Refinance			In process	

Data can be sorted by each column header and headers can be dragged and dropped to rearrange the columns in any desired layout.

Adding an Order to My Orders

To add a step from a queue tab to the My Orders tab list, highlight the desired step and select the **Add to My Orders** drop-down on the My Orders panel. The drop-down contains two choices:

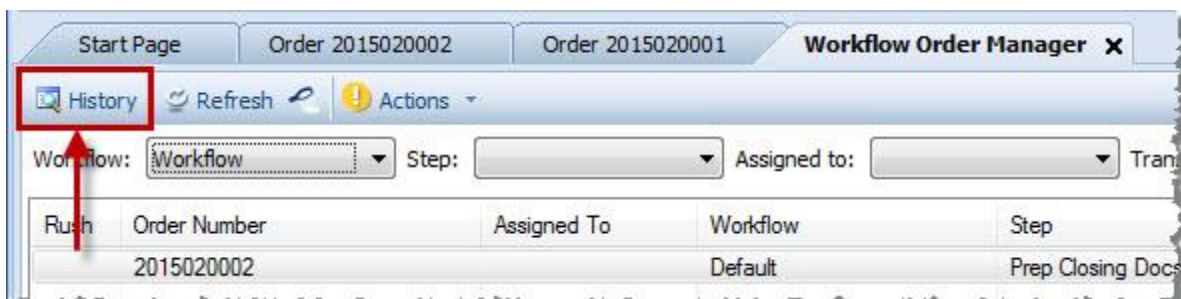
- **Add to My Orders** - order is removed from queue, assigned to the current user and any tasks associated with the current step are created in the order and assigned to the current user.
- **Add to My Orders and Open** - this option functions the same as the Add to My Orders option, but additionally opens all selected orders that were successfully added to My Orders.

Note: Orders do not open if they have not been successfully assigned to My Orders for any reason (i.e. another user assigned it to their My Orders first).

Workflow Order Manager

History

The **History** button displays a new window showing the history of the order as it has moved through the workflow process. If multiple orders are selected, a new window for each order is opened.

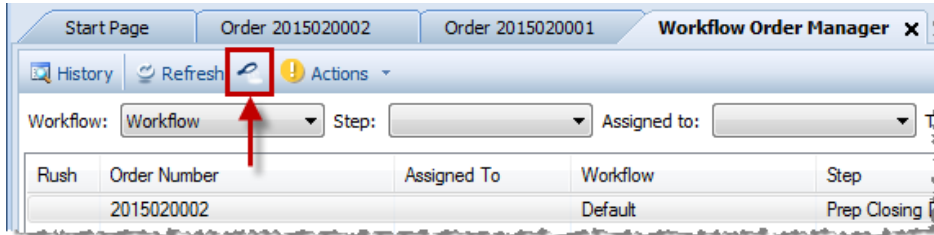


Refresh

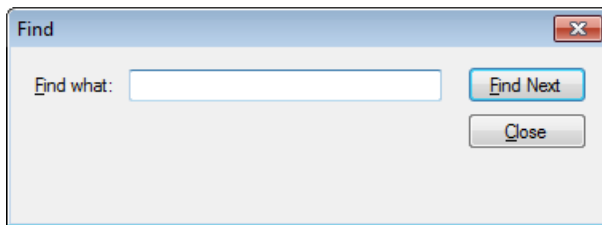
The **Refresh** button updates the listing from the database.

Search

The **Search** button will pull up a search dialog:



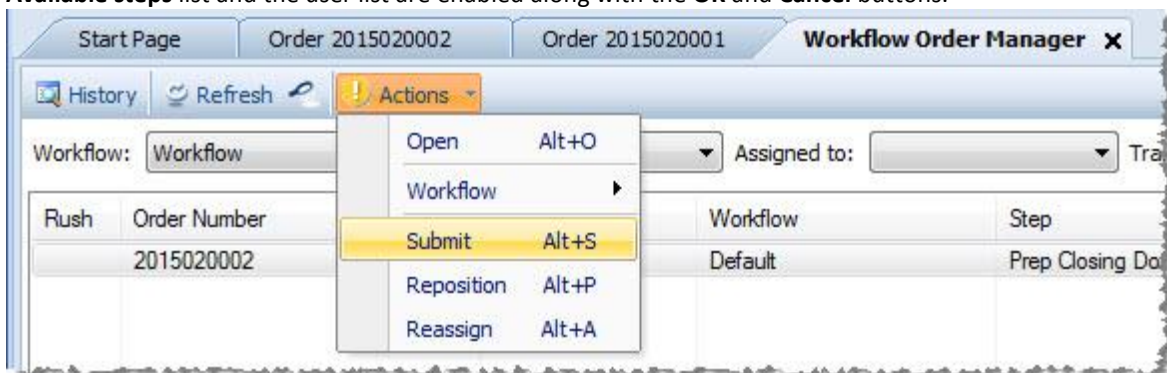
This feature will search and locate any matches in the results list and highlight the whole row. When **Find Next** is pressed, it will highlight the next row it finds that contains a match.



Action

The **Action** button is the point where the order can be controlled within the workflow. This menu button displays a drop-down menu when clicked (for example, Workflow, Submit, Reposition and Reassign).

When **Submit** is pressed, the bottom section of the screen becomes active. The **Available workflow processes**, **Available steps** list and the user list are enabled along with the **OK** and **Cancel** buttons.



The Submit allows the user to submit an order to a workflow as if it was submitted through the order screen by the owning user. This item is always active. If an order is selected that is not part of workflow, the system treats it as an initial submission. Multiple selections are allowed. **Note:** The list of available workflow processes changes depending on the profile assigned to the workflow.

When **Reposition** is pressed, the bottom section of the screen becomes active. Select one step within the order's current workflow to reposition it. The list then populates with available users to handle the order at the step.

- Select the **Place in queue** radio button, and the orders are placed in the step queue to be selected later by others.

- Select the **Assign to user** radio button, the list becomes active and users can select a single individual to receive the orders. Click **OK** to commit the change or **Cancel** to discard the changes.

Selecting **Reassign** is similar to Reposition except that a step cannot be selected to reposition the order.

Filters

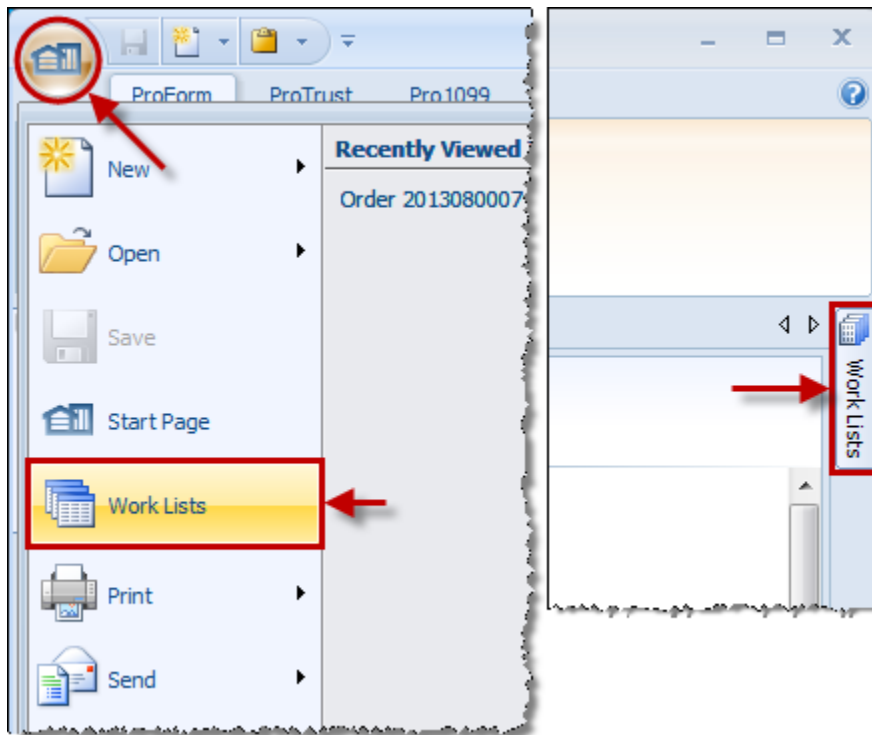
Workflow: Step: Assigned to: Trans. type:

The Manager has multiple filter fields to assist in locating the desired order. Select the filters desired from the available drop-downs and click the **Filter** button to activate your selections. Click **Show All** to return all results and reset the filters.


Work Lists

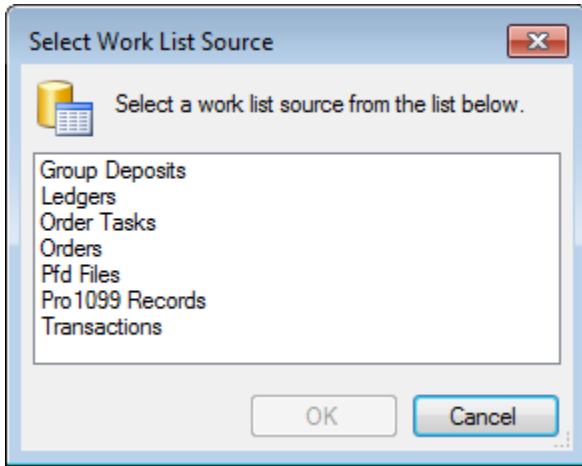
The **Work Lists** feature enables users to create and customize queries to organize their orders and queues, and allows them to save their settings, personalizing the program to best suit their needs.

- To access the Work Lists panel, select the list from the Work Lists tab on the far right side of the screen, or from the main program drop-down menu on the left side of the screen:

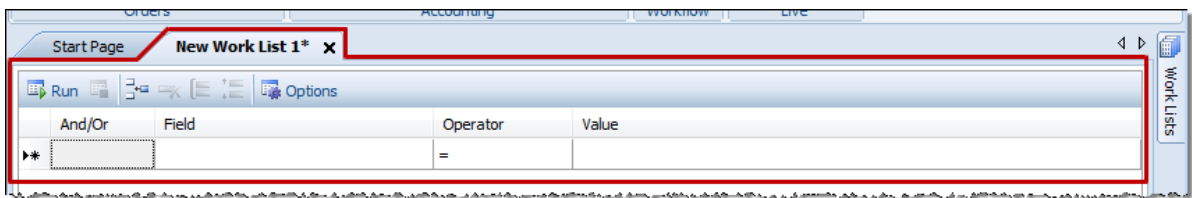


Creating Work Lists

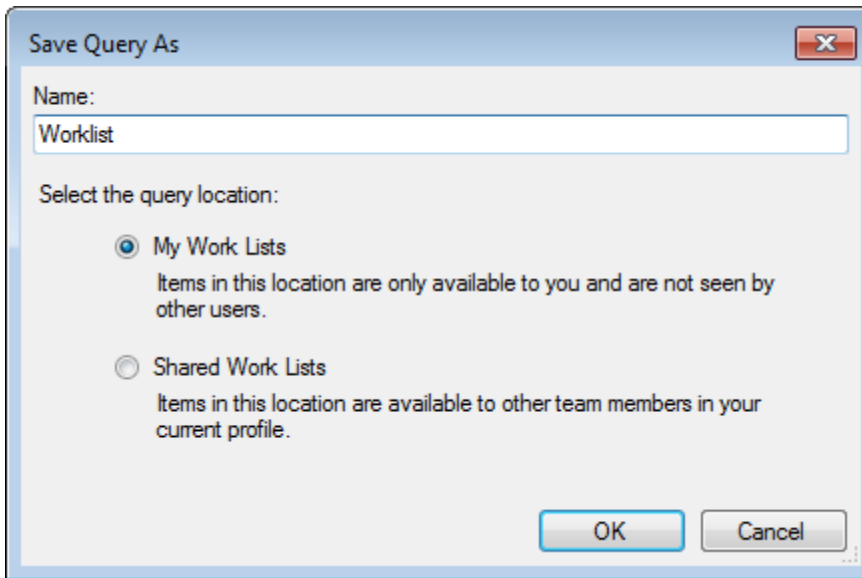
1. To add a new Work List query, click on the **New Query** button  to bring up the **Select Work List Source** dialog. Select a source from the list and press **OK**:



2. You will see a **New Work List** panel. Here is where you [build, edit, and save](#) work list queries. For detailed information, [read below](#):



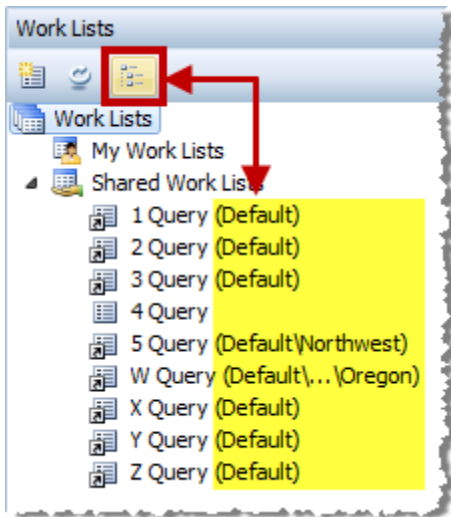
3. Once the query is complete, use the **Main Menu** or **Ctrl+S** to save the query. You will be prompted to create an **individual** or **shared** work list. **Note:** once a work list is saved, it may not be converted from a **My Work List** into a **Shared Work List**:



My Work Lists, Shared Work Lists, & Profile Paths

- **My Work Lists** are associated with individual users and will be available underneath the **My Work Lists** icon; work lists shown under the **Shared Work Lists** icon will display only those items which are accessible to the current user based on permissions set in SPAdmin.

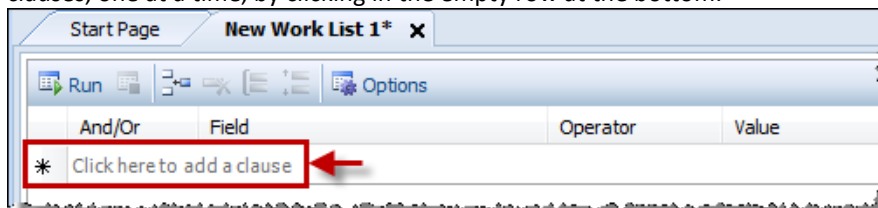
- The user may click **Show Profile Paths button** to show the profiles under which the shared work list(s) were created. These paths will only show **inherited work list profiles**; they will not display if the user is logged in to the profile where the work list was created.
- **For example**, this user can see that she has been given access to a number of work lists created under different profiles, but she is currently logged in to the profile that created **4 Query**:



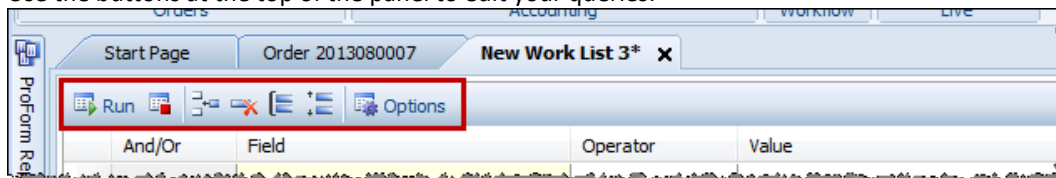
Queries

WORK LIST EDITOR

To locate specific orders or tasks that need to be addressed, create a query in the Work List panel. You may insert clauses, one at a time, by clicking in the empty row at the bottom:



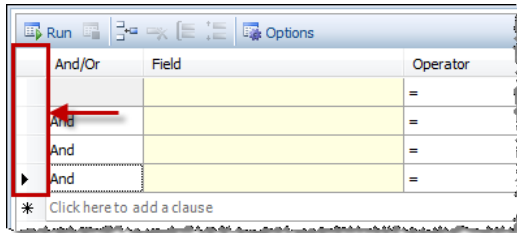
Use the buttons at the top of the panel to edit your queries:



The buttons function as follows:

- **Run:** Runs the query defined in the Work List editor and returns results based on the conditions defined in the clause
- **Stop:** Stops the active query from running.
- **Insert:** Inserts a new clause into the query. You may also click in the empty row at the bottom to insert a clause.
- **Delete:** Deletes a clause from the query.

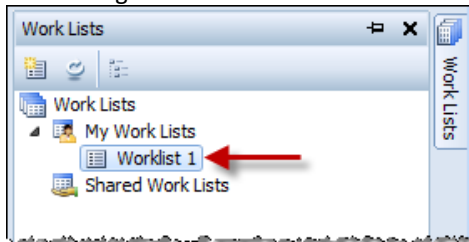
- **Group:** Groups two or more clauses in the query. Groupings function as a single unit separate from the rest of the query and are helpful when constructing complex queries. There are a couple of ways to select multiple rows for grouping. You must make your selections using the far left column in the panel:



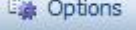
1. You may click and drag up or down to select several rows at once.
2. You may hold down the Ctrl key and click to select several individual rows.
3. You may press Shift and click two rows to select those rows and any in between.

Ungroup: Ungroups clauses in the query. In order for this button to work, you must have selected the entire group.

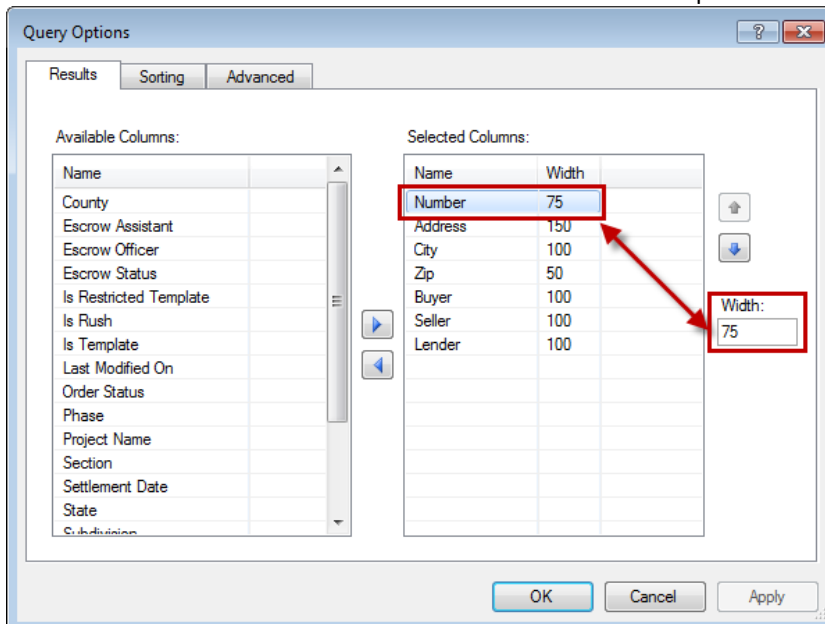
Rename: To rename a work list, click on the work list's name in the **Work Lists** panel. The field will become active and editing will be enabled:



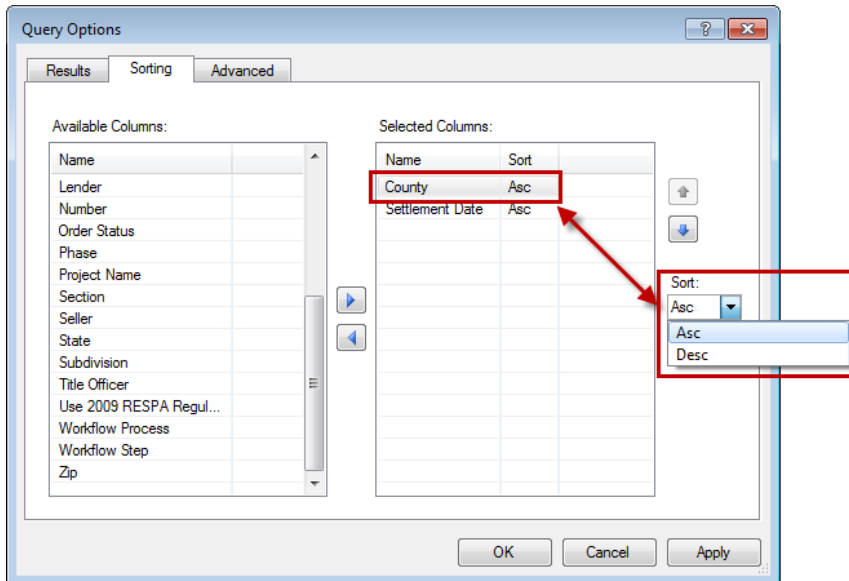
QUERY OPTIONS

Width & Sorting: The width and sorting of columns may be specified by selecting the Options button  and choosing either the Results or Sorting tab in the dialog box.

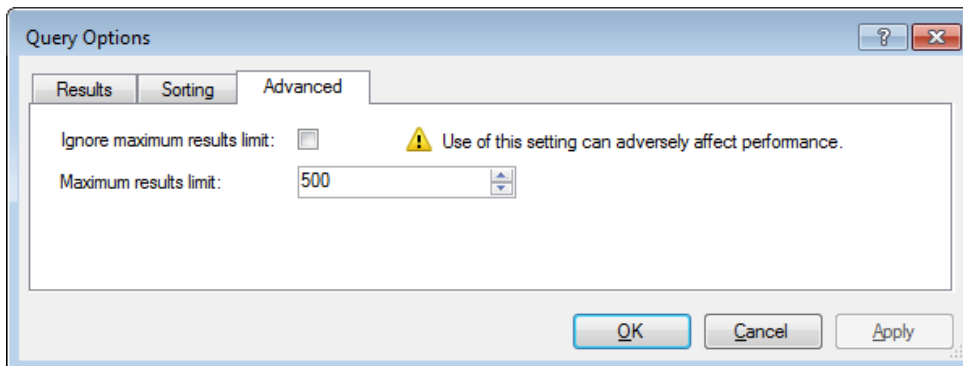
The **Results tab** is used to set the order in which the results are presented in the Work List Results pane.



The **Sorting tab** is used to set the order in which the results are presented in the Work List Results pane. In this screenshot, the program would first sort results by county. It would list these results in ascending order. Then, the program would further sort—within the county results—according to the settlement dates:



The **Advanced tab** enables the user to specify a Maximum search results limit up to 1 million. If the checkbox is checked, then the limit is ignored, and all matching results will be returned.



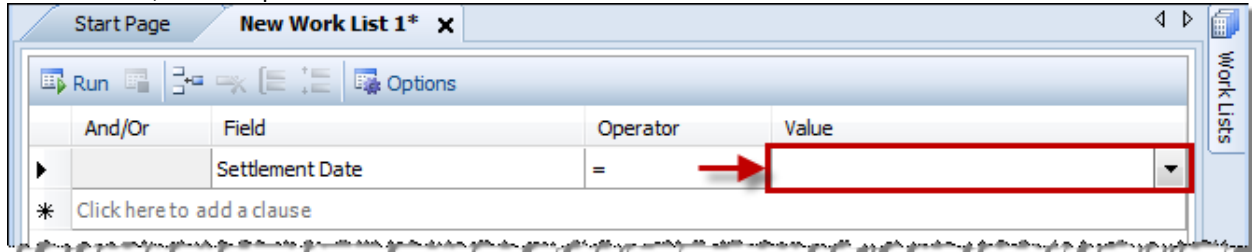
QUERY BUILDER

Field: The list shown within this column contains all of the searchable fields allowed in the Work List function. Use as many clauses and fields as needed to produce useful results. The more specific a query, the more focused the results returned.

Operator: The Operator further defines the field selection. Examples of operator choices are = (equal), <> (not equal to), > (greater than), < (less than), >= (greater than or equal to), <= (less than or equal to), In, Starts With, Ends With, Was Ever, Was Never, and Contains.

Value: Specifies the value that the user is looking for in the defined field. The query builder will allow users to search for fields with a blank or empty value. To do so, select the field, choose “=” (equal) or “<>” (not equal) as

the operator, and leave the value field blank. This allows you to find orders where a settlement date has not yet been entered, for example.



Adding a Query

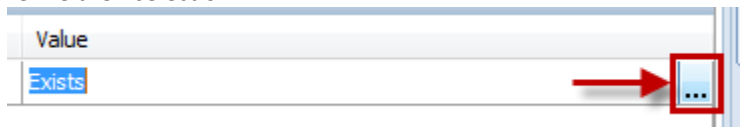
To add a new query to your work list:

1. Click a row in the **Query Builder** dialog to add a new clause to the query.
2. Click each column in the query clause to fill in the clause. If a column has pre-defined values, a drop-down arrow appears when the column is selected.
3. To add additional clauses, click the **next row** in the query builder and further define the column values as desired.
4. Once clauses have been defined, click **Run** to validate the query and return the search results.

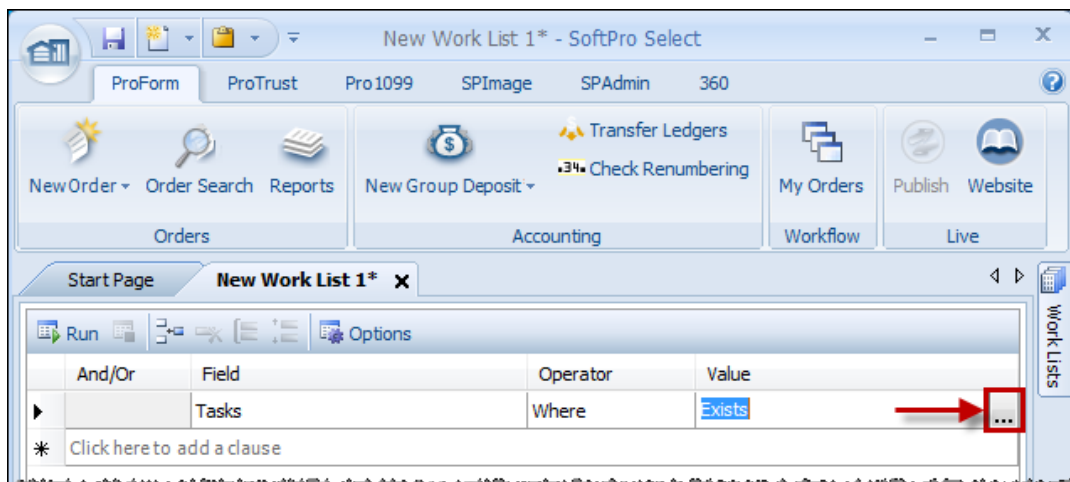
Subqueries

Subqueries allow the user to easily drill down and refine their queries.

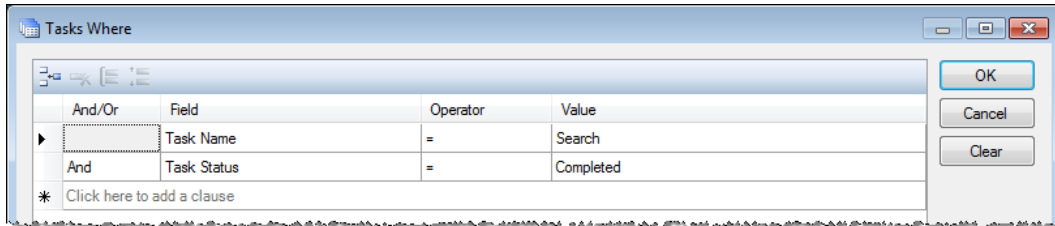
Fields that allow for multiples will show an **ellipses button** and give the user the opportunity to drill down and refine their selection:



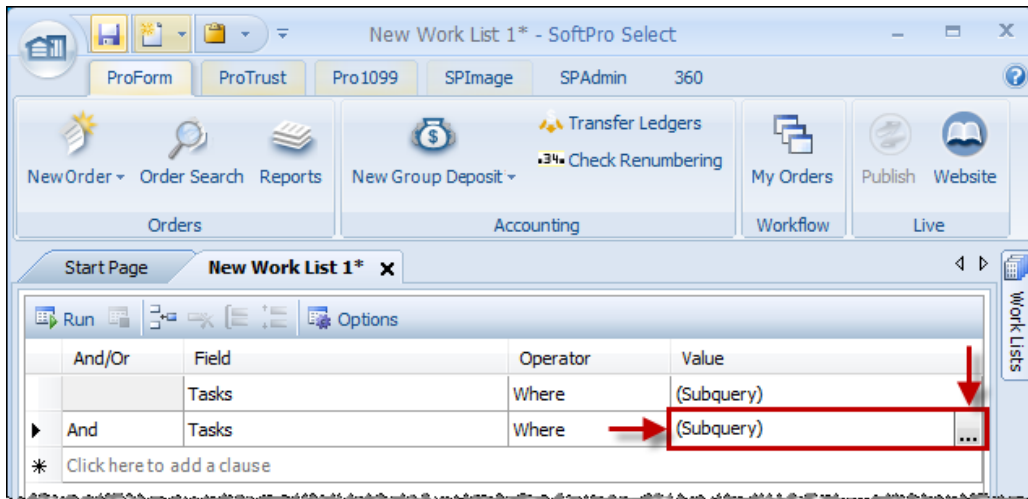
For example, here's what is shown in the main query builder when the "Tasks" field is selected. The first row presents the user with the ellipses button:



Clicking on the ellipses button allows the user to create a Subquery for that row. **Please note** that this is a pop-up dialog:



After entering a subquery, **(Subquery)** will show in the Value column. To edit these subqueries, all that is necessary is to click the ellipses button again:



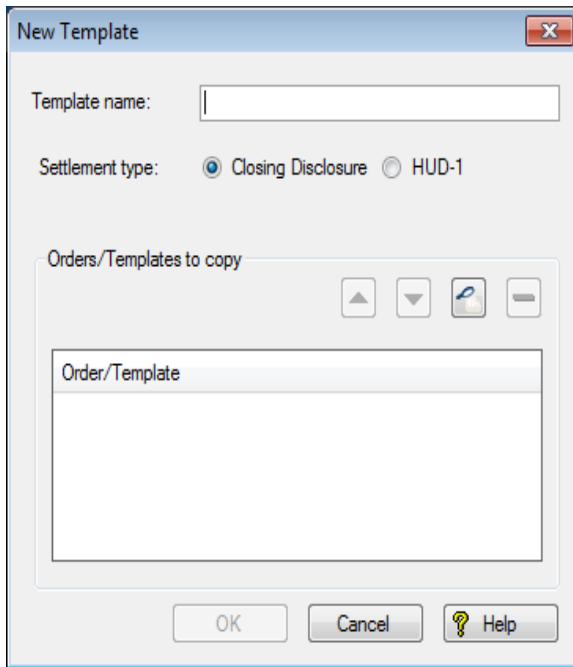
Groups available for subqueries: Contacts, Loans, Properties, Title Products, and Tasks, which includes checklist and requested tasks related fields.

Templates

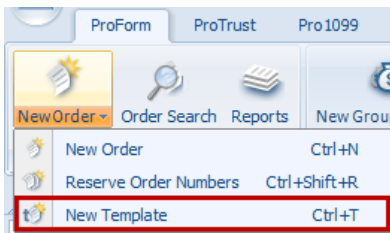
- Users can select one or more templates (or orders acting as templates) to apply to an order.
- Apply templates to new orders or to existing orders at any time unless any one of the lock status fields is marked **“Locked”** and then templates cannot be applied.
- User-entered data in the template will never overwrite user-entered data in the order – the receiving order data always takes precedence.
- System-calculated data in a template is always ignored.
- Permissions on order objects are ignored completely.
- If a template includes multiples, the data will always overwrite the matching multiple in the order (ex: property 1 data in template goes only to property 1 data in order). Sole exceptions are order tasks and requirements/exceptions, which always append to data already in the order (duplicates are ignored).
- If more than 1 template is applied, the data in the first template always take precedence
- Certain fields (e.g.: **“Completed by”** names and date stamps, critical order data such as order number) can be flagged to be ignored completely during this process.
- Templates can be applied at any time. The sole exception is if any one of the lock status fields is marked **“Locked”**, then no templates can be applied.

- Each time a template is applied, an entry will be made to the order history with the name of the template.

Creating a New Template



1. While on the **ProForm** tab, click the arrow under the **New Order** button and select **New Template**. You may also use the **CTRL+T** shortcut.







2. Enter a **Template name**.
3. (Optional) To copy information from an existing order or template, click the **Search** button. See [Searching for an Order/Template to Copy](#) for more. Multiple orders and templates can be copied.
4. Click **OK**.

Searching for an Order/Template to Copy

1. Click **Search** on the New Template dialog.
2. Enter search criteria on the **Order Search** screen.
3. Click **Search**.
4. Select the order or template to copy on the **Search Results** screen (Select multiple orders using the **CTRL** or **SHIFT** keys).
5. Click **OK**. The selected items appear on the **New Template** dialog.

Copying Multiple Orders/Templates

Orders and templates are copied in the order in which they appear in the **Order/Template** list. Use the buttons to move items up/down the list, search for additional items to copy, or delete items from the list.





	Move selected item up the list
	Move selected item down the list
	Search for orders/templates to copy
	Delete selected items from the list

Applying a Template

1. Click the **Order** tab, then **Apply Template**.
2. Enter search criteria on the **Order Search** screen.
3. Click **Search**.
4. Select the order or template to copy on the **Search Results** screen (Select multiple orders using the CTRL or SHIFT keys).
5. Click **OK**.

Copying Multiple Orders/Templates

Orders and templates are copied in the order in which they appear in the **Order/Template** list. Use the buttons to move items up/down the list, search for additional items to copy, or delete items from the list.

	Move selected item up the list
	Move selected item down the list
	Search for orders/templates to copy
	Delete selected item(s) from the list

What Can You Do with ProForm?

ProForm: Closing and Title Insurance Forms

ProForm offers improved speed, accuracy, and control over every phase of the closing and title process. Enter data (such as sales price, buyer's name, etc.) only once and ProForm does the rest. It performs all the calculations in real-time including taxes, payoffs, commissions, title insurance premiums, and all prorations. When choosing documents to print, ProForm fills in the data at the appropriate locations on the documents. ProForm includes the HUD-1 Settlement Statement, HUD-1A, Disbursements Summary, Title Commitments and Policies, and over 100 other ReadyDocs (ready-to-print documents).

Learning the Environment

ProForm was designed to complement your workflow. Installation is quick and simple. No third party software is required. You'll have everything you need in order to handle any type of closing from the simple to the complex. Some of the highlights are:

- ProForm's flexible working environment allows you to choose your method of data entry -- use the data entry screens or enter data directly using the on-screen HUD-1.
- ProForm is built around standard Windows features such as multi tasking which allows you to work on more than one file or document at a time.
- Quickly locate the file you need with ProForm's advanced searching capability.
- ProForm for Windows includes a comprehensive menu help system. Search on any topic and print just the information you need. Context sensitive help is available for every field in ProForm.

Data Entry and Calculations

With ProForm, you can immediately enter data in a familiar environment with screens that look like the HUD-1. ProForm will perform all calculations as you are entering data and you will instantly see the results displayed on-screen. With ProForm's one-time data entry, you will never have to retype anything. Some of the highlights are:

- Copy one or more templates pre-filled with basic information to increase data entry speed.
- Look-up tables store frequently used information and fill screens automatically which eliminates your need for a rolodex.
- File Balance Wizard indicates which lines of the HUD-1 are out of balance.
- At any time you can glance at the status bar to see if your HUD-1 is in balance, as well as what the buyer needs to bring to the table.

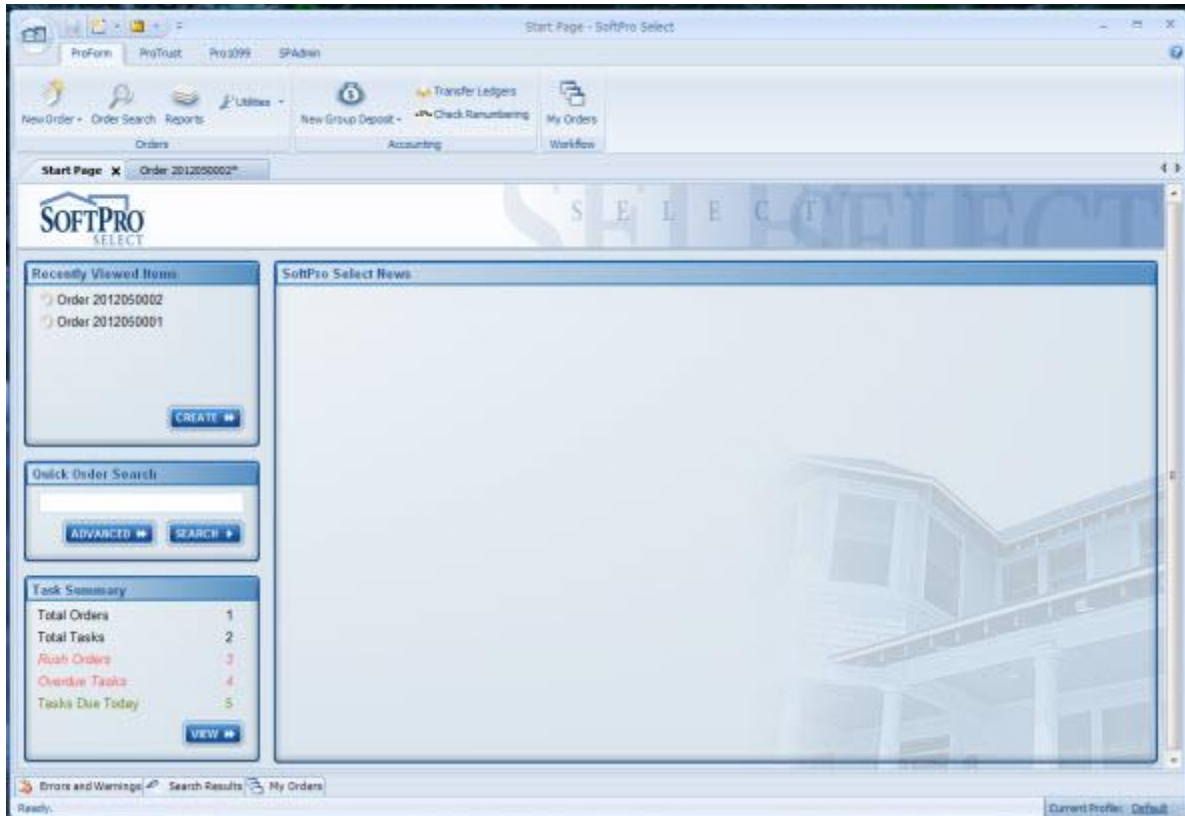
Editing and Document Generation

Once you have entered closing and title data, you may select from numerous documents which are included. ProForm provides the ultimate flexibility in document generation. You can edit the documents we include or add your own with your word processor. Some of the highlights are:

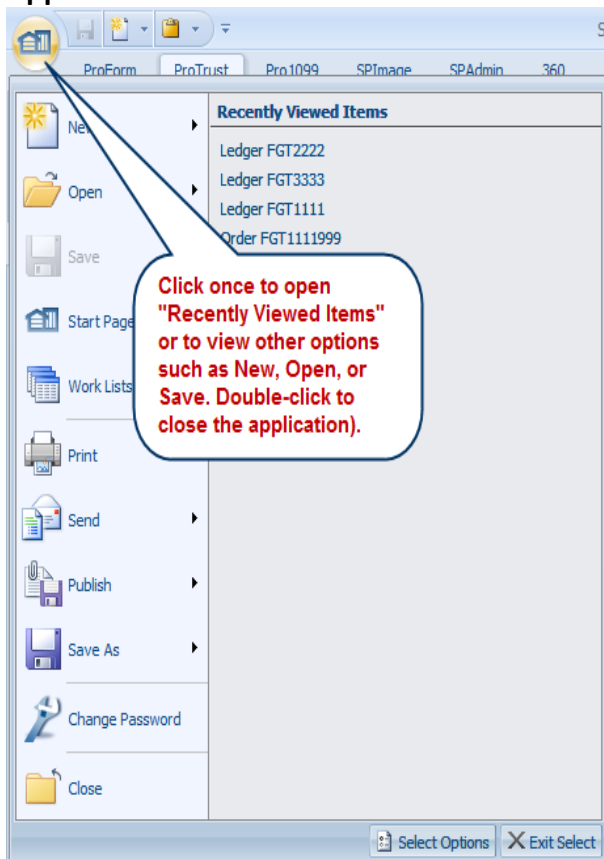
- ReadyDocs are documents that print directly from ProForm. Crystal Reports can also be used to develop ReadyDocs.
- DocCheck allows you to view documents on-screen with the data filled in exactly as they will print.
- When viewing any documents, click on HotSpots to make a quick correction.
- The TypeLite feature lets you know the difference between text that defaults and what is user entered.

ProForm Start Page Overview

When ProForm is launched, the **ProForm Start Page** provides a starting point to conduct common actions (for example, opening an order, creating a new order, searching for orders, etc.) and a summary of assigned orders and/or tasks to be worked on.



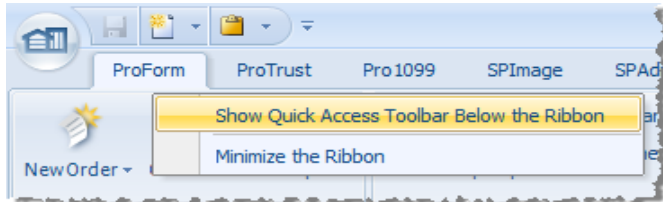
Application Button



Clicking the application button once displays the following options: **New, Open, Save, Start Page, Print, Change Password, Close and Recently Viewed Items**. Double-clicking the application button closes SoftPro Select. The

Recently Viewed Items list displays recently opened ProForm orders and templates, ProTrust ledgers and Pro1099 records.

Display Options

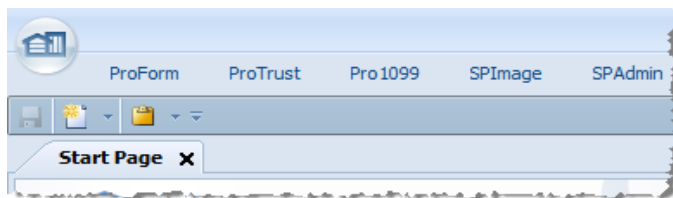


Right-click anywhere in the "ribbon" (the big blue bar) to customize the view. Options include:

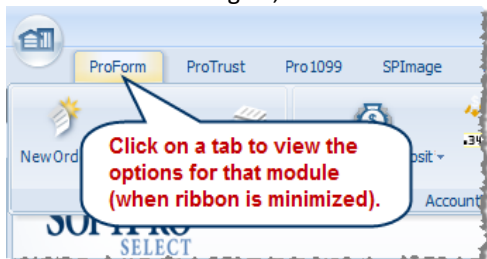
- displaying the **Quick Access Toolbar** (the bar that displays the **Save**, **New** and **Paste** icons) below the ribbon,



- or minimizing the ribbon.



To view the ribbon again, click on one of the tabs to view the ribbon for that module,



or right-click again and un-check "**Minimize the Ribbon**".

Profile View

The current profile now displays at the bottom right-hand corner of the screen. If you are associated with multiple profiles, click on the profile hyperlink to change profiles. Prior to changing profiles all active tabs must be closed. For example, close all open Orders or Ledgers.

Current Profile: [Default](#)

Quick Order Search

A screenshot of the 'Quick Order Search' dialog box. It features a search input field at the top. Below the field are two buttons: 'ADVANCED' with a right-pointing arrow and 'SEARCH' with a right-pointing arrow.

To search for an order, enter search information in the **Quick Order Search** field. The search engine searches through buyer name, seller name, lender name, order number, property address and settlement date fields simultaneously.

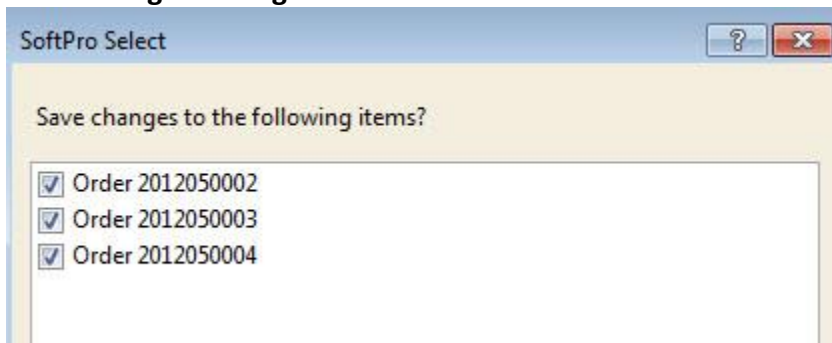
The asterisk * [wildcard](#) is allowed and is beneficial when searching for orders, narrowing search results, or when only partial names are known.

Search Results Bar

Until performing a search in Pro1099, ProForm or ProTrust, the **Show results from** field is blank. Once a search is performed, the **Show results from** field defaults to the last item searched for. For example, perform a search in ProForm Orders and ProTrust Ledgers, & they display in the Show results from field. Filter the search results in the Search Results bar. To filter the results, select one of the options from the list. The results display in the grid below.

A screenshot of the 'Search Results' bar. It shows a dropdown menu for 'Show results from:' with 'ProTrust Ledgers' selected. Below the dropdown, it indicates 'Search Results: 9 re' and 'Ledger'. A list of search results is visible, with 'ProTrust Ledgers' highlighted.

Save Changes Dialog

A screenshot of the 'SoftPro Select' dialog box. The title bar reads 'SoftPro Select' and includes help and close buttons. The main text asks 'Save changes to the following items?'. Below this, there is a list of three items, each with a checked checkbox: 'Order 2012050002', 'Order 2012050003', and 'Order 2012050004'.

If more than one order, ledger or 1099 record is open and the user tries to close SoftPro Select, the Save Changes dialog prompts the user to save changes before closing the application. Check the orders to save and click **Yes**.

Click **No** to close SoftPro Select without saving the items displayed in the dialog. Click **Cancel** to continue working in SoftPro Select.

If attempting to save an order or 1099 record that contains warnings, the dialog prompts you to view the warnings. Click **Yes** to view the warnings or **No** to close the application without viewing the warnings.

ProForm Search Page

Enter as much information as necessary to perform a search for a file. Search criteria are grouped into four main categories: **Order**, **Property**, **Title** and **Contact** information. Click **Search** to find a file. Click **Clear** to clear the search [fields](#). Although it is not necessary to do so, you may use [wildcards](#) here.

How to search

You may search for orders, templates, or reserved orders.

1. Enter search criteria into the appropriate [fields](#). Certain [wildcard](#) characters can be used in all fields except date and combo-box fields, although this is not required.
2. If a "beginning date" is entered in the date fields (ex. settlement date) but no end date, the system searches for all orders beginning with the entered date through all existing orders after that date. For example, if a settlement date of 5/01/07 is entered, any orders with a settlement date of 5/01/07 and after appear in the results.
3. Conversely, if a "through date" is entered in the date fields but no beginning date, the system finds all orders matching the "end date" and all others before the end date. For example, enter a "through" date in the "order received" field, but no beginning date, and the program searches for any order with a received date of 5/01/07 and before 5/01/07.
4. Click **Search**.

Formula Editor

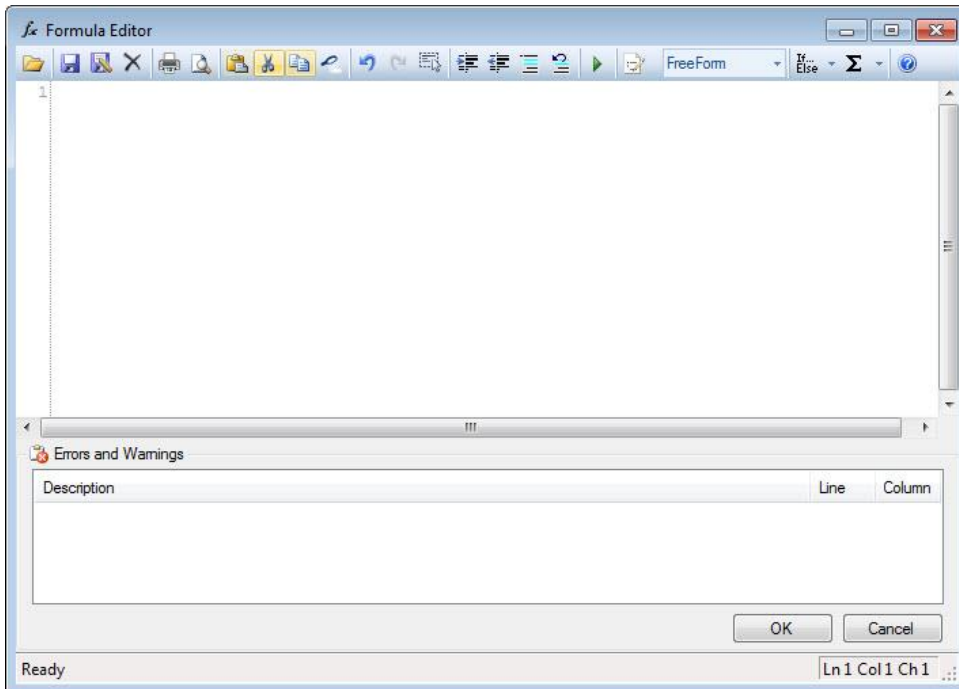
Enter defined formulas and calculations using the formula editor. Select from a pre-defined formula or enter an undefined free-form version. Enter the free-form formula in the text editor.

Note: Custom fields are referenced in the formulas. All functionality related to formulas available for common fields is also available for all types of custom fields.

Accessing the Formula Editor

To access the Formula Editor:

1. Press **F8** from any editable field (excludes system-generated or unavailable fields). The Formula Editor window appears.
2. If **Free Form** was selected, enter the formula in the text field.



3. Select **None** from the drop-down list to remove formulas from fields.
4. Click the green arrow button on the toolbar to execute the formula. A description, along with the time it took to compile the formula, will appear in the Errors and Warnings panel on the bottom of the dialog.
5. Click Ok.

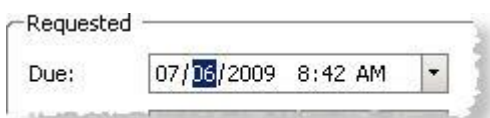
Entering "TaskDueDate" Formulas

Use the pre-defined TaskDueDate in the formula editor to create calculations in the **Checklist** and **Requested Task Screens Due Date** fields. Parameters change depending on if it is a **Requested Due Date**, **Requested Task Received Due Date**, or **Checklist Task Due Date**.

Select **TaskDueDate** from the drop-down. Enter the information in the parameters. For example, enter a requested due date of 7 days after the order is received,



and the formula appears as the date in the **Due** field as follows:



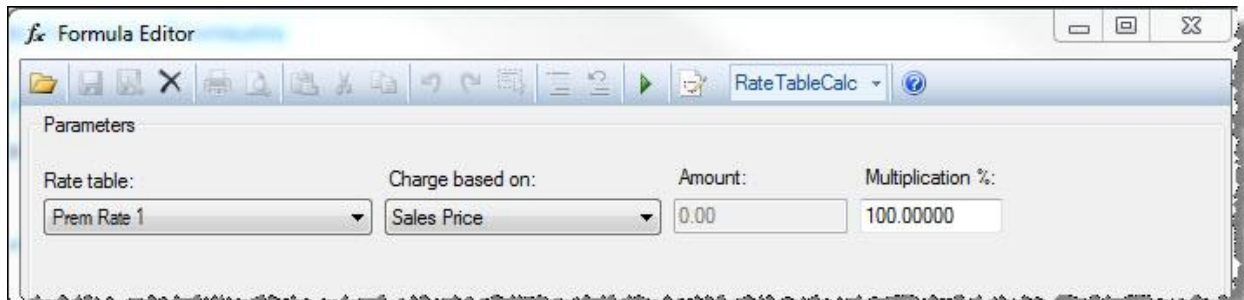
Entering "RateTableCalc" Formulas

Use the pre-defined RateTableCalc in the Formula Editor to create calculations using specific rate tables.

Parameters include **Rate table** and **Charge based on** drop-downs and **Amount**, and **Multiplication %** fields.

- **Rate table:** Displays a list of active current premium rate tables (name and version).
- **Charge based on:** Includes sales price, other, loan amount and policy coverage amount. The list varies based on the field. **Sales Price** and **Other** are always available. Loan Amount is available on Endorsements, Loan Policy, Additional Title Charges, and Title Insurance Premiums. Policy Coverage Amount is available on Endorsements, Policy, and Additional Title Charges.
- **Amount:** Defaults amount based on selection in **Charge based on** drop-down. This field is disabled unless **Other** is selected.
- **Multiplication %:** Defaults as **100.00** and allows user modifications.

From the drop-down menu, select **Free Form** or a **pre-defined formula**.

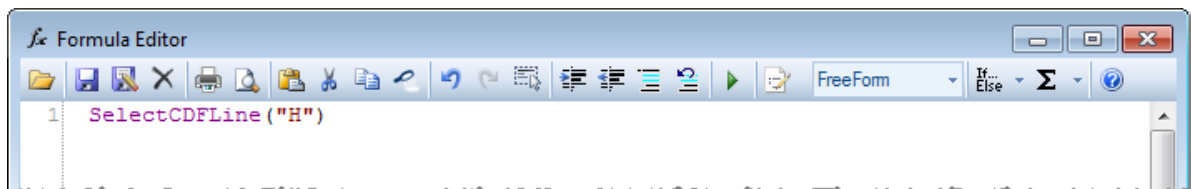


Entering SelectCDFLine() Formulas

For CDF orders only, the user may assign a CDF section and Line number via a new **SelectCDFLine()** formula

function. **Note:** Access the formula editor by using the **F8** key.

- The formula can be used in **templates** and in the **CDFLine** column in a **lookup table**.
- Using this formula will prevent a lookup entry from selecting the CDF Line before the charge is ready to be sent to the CDF, and it will prevent unrelated charges from defaulting to the same CDF Line.
- **For example**, in order to select the next available **Section H** line when the entry is retrieved into the order, the CDF Line column would need this formula:



- When the charge is actually ready to be sent to the CDF, the next available CDF Line in **Section H** will populate.

Allowed parameter values for the **Formula Editor** and text fields in the **Policy Manager**:

Allowed Value	Example
SectionLetter	B
SectionLetter.	B.
SectionLetterNumber	B01
SectonLetter.Number	B.01
SectionLetter<space>Number	B 01
SectionLetterNumber, no leading zero for the number	B1
SectionLetter.Number, no leading zero for the number	B.1
SectionLetter<space>Number, no leading zero for the number	B 1

See also: [Formula Editor Toolbars](#)

Lookup Tables

Lookup tables provide a simple method of populating common data into an order. Fields with associated Lookup tables are indicated by hyperlinks. These fields are called Lookup key fields. Lookup tables are accessed three ways:

1. by clicking the hyperlink associated with the lookup table;
2. placing the cursor in the key field and pressing **F9**; and
3. the keyboard shortcut **Ctrl+L**

If there is no Lookup table associated with a field, an error message, "Lookup Table Not Found" displays when pressing **F9** or **Ctrl+L**.

Lookup tables are available based on their profile assignments and the user's current profile. Current [profiles](#) may inherit lookup tables from their parent profiles.

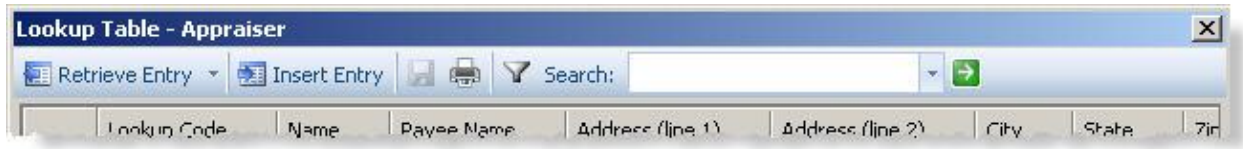
The Lookup dialog displays entries in the table. The dialog title changes to display the name of the current table.

Use the toolbar options on the Lookup dialog to perform the following tasks:



- **Retrieve Entry:** (Alt+R) Retrieves the selected entry from the list into the order. This selection also resolves any field codes & prompts contained in entries. You can also retrieve entries by navigating to the selected entry & pressing Enter or double-clicking anywhere on a selected row.
- **Retrieve Entry (With Field Codes):** (Alt+E) Retrieves the selected entry from the list into the order. This selection returns entries containing field codes and/or prompts without resolution.

- [Retrieve Entry \(Appended\)](#): (Alt+T) Retrieves the selected entry from the list to append text fields with the selected entry. This option is only available when assigned in the Lookup Table Management Console. Any fields or entries containing formulas do not append.



- **Insert Entry**: (Alt+N) Inserts any user-entered data from the order to create an entry in the Lookup dialog. Data must exist in the Key field to enable this option.
- **Save**: (Ctrl+S) Saves new entries and modifications to existing entries.
- **Print**: (Ctrl+P) Prints the contents of the Lookup table.
- [Show Filter](#): Provides a method to filter entries based on a specific column. Auto-filtering can be enabled for a Lookup table in SPAdmin.
- **Search**: Entering keywords in the Search field retrieves entries based on the search criteria. For example, entering a keyword beginning with Ca retrieves all entries containing words that start with Ca. Press **Enter** or **Go** (green arrow button) to start the search. **Note**: Searches are performed using text or numeric values only. All special characters are ignored. Words that are too familiar, (i.e., of or to) will not have their records returned. Searches are not case-sensitive.

When you access any Lookup table, the first 500 entries in the table are retrieved and displayed. Using **Search** returns all entries meeting your criteria.

LOOKUP ENTRY GRID

The grid displays the lookup entries. Re-sort columns in the grid by clicking on any row header. The width of any column may be changed. Columns can be moved to display them in a different order in the grid. User settings are remembered the next time the user logs in and accesses the specific table. The order does not need to be saved to store these changes.

[Auto-Lookup Method for Retrieving Lookup Entries](#)

If key values are known for common lookups, users can automatically retrieve the lookup information into the order by inputting the value (i.e., lookup code) into the key field of the order. When tabbing out of the field, if the value entered matches a key field value in the associated lookup table, the entry automatically populates the order. Matching data values are based on exact matches, including spaces and any special characters, but are not case-sensitive. When duplicate key values exist in a lookup table, the Lookup dialog opens to display the matching entries for selection and retrieval.

The key field may require validation. This is established in [SPAdmin](#). If the key field value does not exist in the Lookup table, an error message is displayed. Either clear the field, enter different data and try again, or access the Lookup table and retrieve your entry.

Resolving Field Codes and Formulas

Field Code Entries

Lookup entries that include **field codes** are resolved in the order and displayed as user-entered (red) text when using the following retrieval methods: [Retrieve Entry](#), double-clicking the selection, or [Auto-Lookup](#). The actual field codes are populated when retrieving using [Retrieve Entry \(With Field Codes\)](#).

Note:

- Fields populated in this manner are not automatically updated by a change in the referenced field without retrieving the lookup entry again.
- Field code entries overwrite user-entered values in the order.
- Field codes are resolved in the order as a blank entry if no data exists in the referenced field.

Field Code Entries and Formatting Options

Formatting options can also be used with lookup entries that include field codes. Entries are resolved based on the formatting option indicated. Examples of formatting options include:

Numeric fields: NOCOMMA, FILLn, PERCENT, WORDS, WORDSC, WORDSN, BRAC, DECn, NOZERO, UC

Date fields: SD, LD, UC, LDT, LDW, LDR

***Each optional formatting attribute must be separated by one or more spaces.

{{fieldcode option1 option2&ldots;}}

EXAMPLES:

- Sales Price in brackets: {{Order.SalesContract.SalesPrice BRAC}} returns [250350.75]
- SD as MM/DD/YY: {{Order.SettlementDate SD}} returns 07/04/10

Field Code Entries with Multiple Entities

When an order includes multiple entities (i.e., multiple properties) and a lookup entry contains field codes to be resolved when retrieving the entry into the order, a dialog displays with a list of the multiple entities. Selecting one from the list resolves each of the associated field codes based on the initial entity selected.

Sample lookup table on Property.Escrow Brief Legal:

Sample entry = This escrow is for {{Order.Property.Address1}}, {{Order.Property.City}}, {{Order.Property.State}}, {{Order.Property.Zip}}.

Formula Entries

Lookup entries that include **formulas** are resolved in the order and displayed as system-entered (black) text regardless of retrieval method.

NOTES:

- Fields populated in this manner are automatically updated when the referenced value is changed without having to retrieve the lookup entry again.
- Formula entries are resolved as a blank entry if no data exists in the referenced field. The formula still populates the formula editor for the field and the field is updated accordingly.

- When using [Insert Entry](#) to add a lookup entry, if any user-entered text exists in a field that has a formula behind it, the user-entered text (not the formula) is added into the lookup entry as text.

Using F2 in a Key Field

Pressing **F2** in the order's Lookup key field removes all related data in the order if the value in the key field matches an entry in the Lookup table's key field. Any user-entered text is also removed if the fields are included in the lookup.

Note: Formulas are never cleared if they exist in the key field or if they are not a result of a Lookup entry retrieval. Otherwise formulas are cleared when you press **F2**.

Filtering Entries

Narrow search results by using filtering:



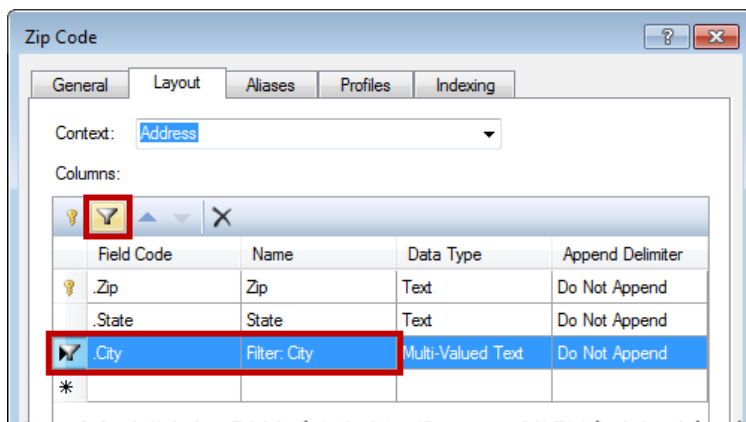
In ProForm, users can enter an **asterisk (*)** after the text in the key field in the order and when the corresponding Lookup dialog is accessed, only the entries with key fields that start with the specified text appear. A user may also click the filter button to view/manually create a filter.

Auto-Filtering

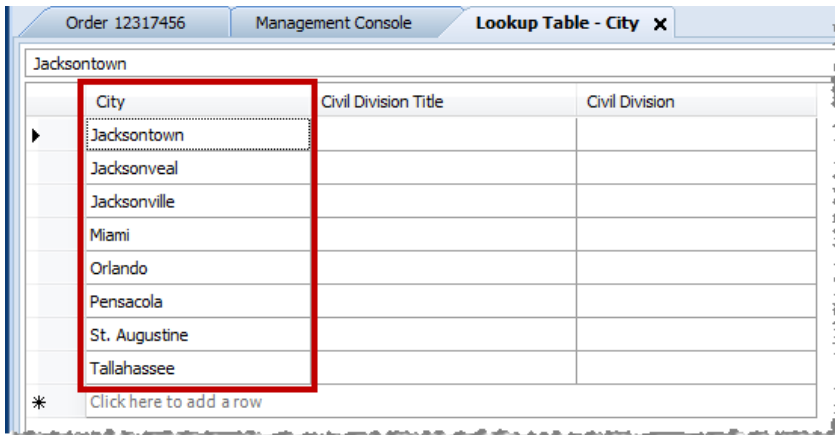
Users can establish a filter field for a Lookup table. This automatically filters entries when the Lookup table is accessed, based on the **key field value** of the filtering column.

Setting up a filter in SPAdmin to filter zip codes based on city:

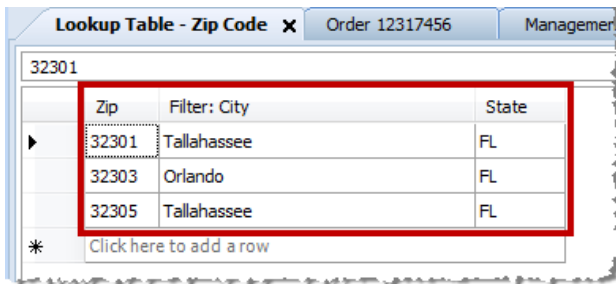
1. Go to **SPAdmin/ProForm/Lookup Tables** to view a complete list of Lookup Tables.
2. Right click on the **Zip Code** table next and select **Properties** from the context menu.
3. Select the **Layout** tab.
4. Input **.City** in the **Field Code** Column, **City** in the **Name** Column, then click the filter button at top to set your **filter field**. Click **OK**.



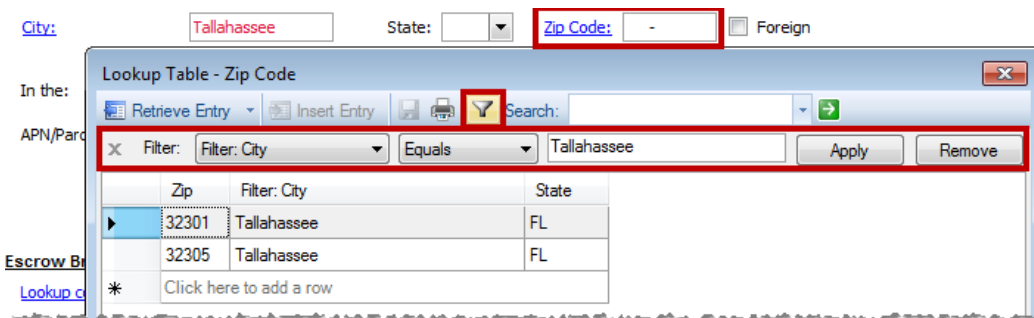
- Right click on the **City Table** and select **Edit Entries** from the context menu. Add any cities you wish to have in your table, save, then close the tab.



- Right click on the **Zip Code** table and select **Edit Entries** from the context menu. Add zip codes you would like to have in your table, as well as cities and states. **Save**, then close the tab.

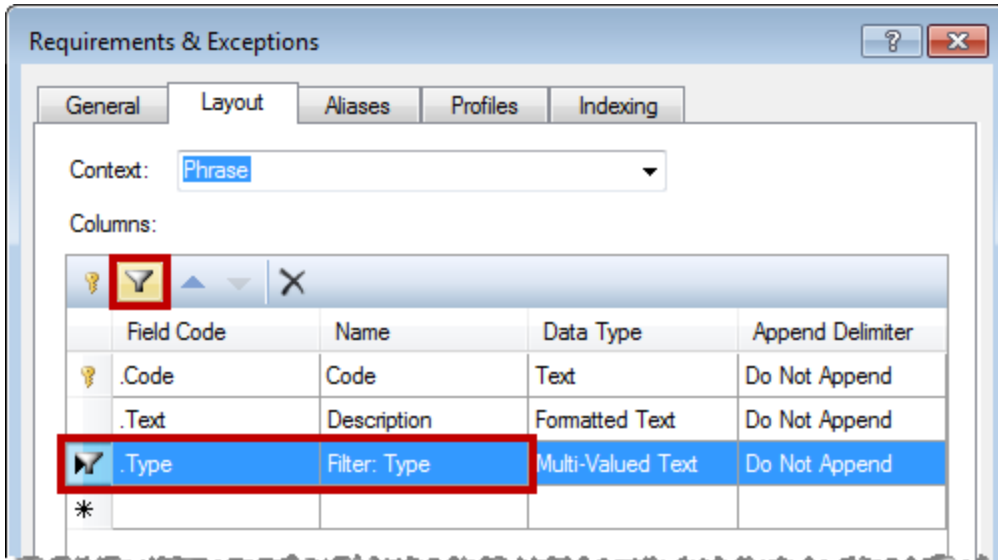


- Close SPAdmin, go into an order, and select a **City** from your lookup table. Next, click **Zip code**. You'll notice that the lookup table has already filtered all the potential zip codes for your particular city based on your lookup tables. **Note:** closing and reopening the program may be necessary for changes to lookup tables to take effect.

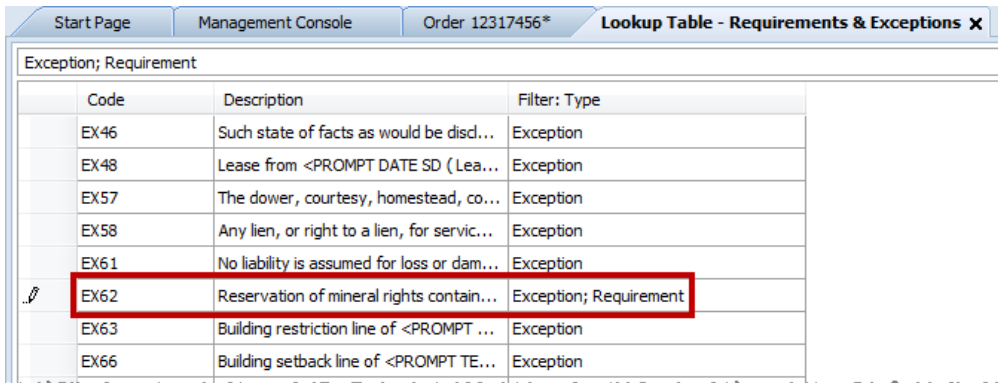


Setting up a filter with multiple entries in the Filter column:

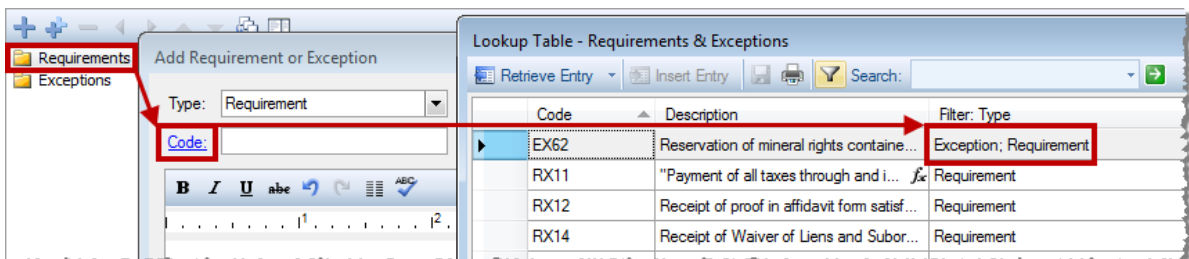
- Go to **SPAdmin/ProForm/Lookup Tables** to view a complete list of Lookup Tables.
- Right click on the **Requirements & Exceptions** table next and select **Properties** from the context menu.
- Select the **Layout** tab.
- Input **.Type** in the **Field Code** Column, **Type** in the **Name** Column, then click the filter button at top to set your **filter field**. Click **OK**.



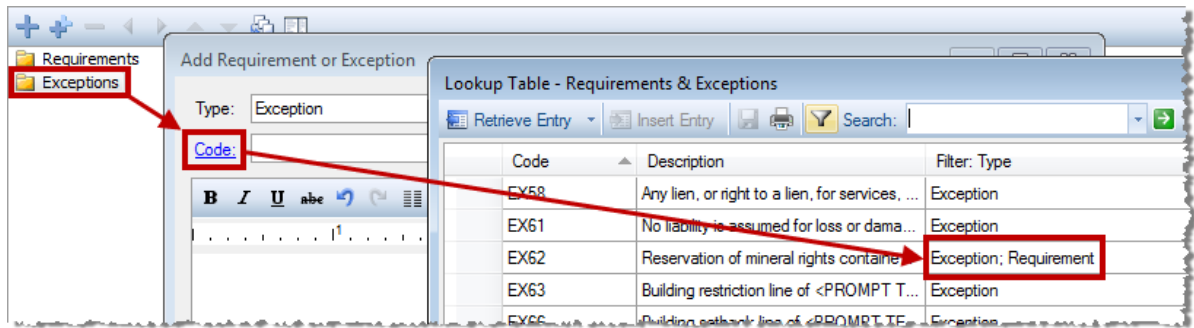
- Right click on the **Requirements & Exceptions** table and select **Edit Entries** from the context menu. In this example, a semicolon and the word **Requirement** was added to a row. Close the tab.



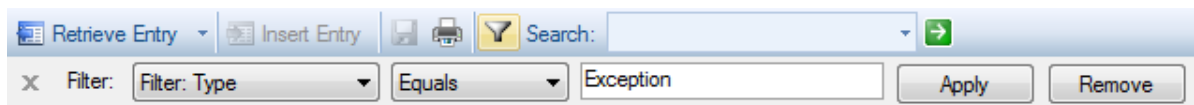
- To see how this item can be filtered in multiple ways, go to the **Commitment - Schedules B1, B2** screen.
- Right click** the **Requirements** folder and select **Add Requirement or Exception** from the context menu.
- Click the **Code** hyperlink to pull up the **Requirements and Exceptions** lookup table, or click in the **Code** field and press **F9**.
- When the lookup table dialog appears, you will notice that the multiple entries added to the filter column in step 5 above now show in the **Filter: Type** column. Close the lookup table.



- Right click** on the **Exceptions** folder, and select **Add Requirement or Exception** from the context menu. Upon scrolling through the list, you will see that the item that was previously listed under Requirements is now also being filtered as an exception as well:



- To view the filter row, click the filter icon at the top of the lookup table dialog. The configuration of this auto filter will be displayed. You may modify the filter column, the filter type (Equals, Contains, and Starts With) and the filtering data as needed. Click **Apply** for updated results. Click **Remove** to display all entries.:



Adding Lookup Entries

If the appropriate permission is granted and the Lookup table [allows edit](#), users can add an entries to a lookup table. Add an entry two ways: direct data entry and extracting data from an order into the lookup table.

Direct Data Entry

- Select the last row in the grid of the Lookup dialog. This is an empty row.
- Enter data in each row. Use the arrow keys to navigate the grid. You can enter formulas by starting the cell with an equal sign (=). The cell will be marked with the formula symbol \mathcal{f}_x . You can add as many rows as needed.

Extract Data from an Order

The second way to add entries is by extracting data from an order into the lookup table. Input data into the order's fields, then access the lookup table from the key field.

Click **Insert Entry**. ProForm inserts user-entered data only from the order into the appropriate columns, including any formulas. If any user-entered text exists in a field that has a formula behind it, the user-entered text (not the formulas) will be inserted into the lookup entry as text.

Note: When a formula is inserted into a lookup entry, it appears as plain text with an \mathcal{f}_x symbol in the cell.

Use **Insert Entry** to:

- Add images to the Lookup tables that utilize them. Examples include Underwriter, Title Company, Settlement Agent and Escrow Company.
- Add formatted text. When formatted text is inserted in the Lookup dialog grid, it appears as plain text with an \mathcal{A} symbol in the cell. This cell is always read-only within the entry grid in ProForm.

All new entries appear in bold text until they are saved.

Lookup entries can contain field codes, prompts, custom prompts and formulas. QuickText is available when adding field codes to entries. Initiate the QuickText with `{{`. Navigate the field code browser presented to select a field code entry. End the QuickText entry with `}}`.

Editing Lookup Entries

If the Lookup table entries permission located in ProForm\OrderYou has been granted, users can edit entries in the Lookup grid.

- If the add permission is granted, users can create new lookup entries or modify existing entries within a ProForm order using Insert Entry.
- If the add and edit permissions are granted, users can create new lookup entries or modify existing entries within a ProForm order, using direct data entry.
- If the delete permission is granted, users can remove any entry from a lookup table within a ProForm order.

When the [Do not allow users to edit data](#) rule is established in the SPAdmin Lookup Table Management Console, for a specified lookup table, users are unable to add, delete or modify data during lookup regardless of permissions. **Insert Entry** is also disabled. An alias lookup table has the same attributes if established for the base table in the Management Console.

EDITING RTF TEXT IN LOOKUP ENTRIES

Fields containing .RTF text can never be edited in the ProForm Lookup entry grid. To edit these entries, retrieve the entry, edit and format the data in the order's field, then update the Lookup entry using the [Insert Entry \(Replace\)](#) option.

Updating Entries Using Insert Entry

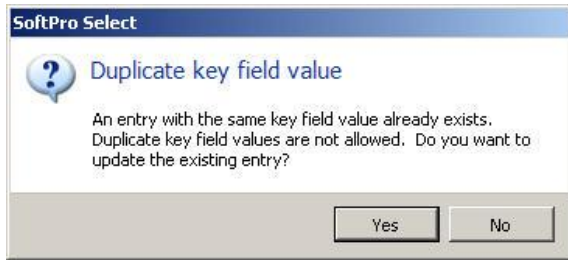
When a Lookup table [allows duplicate key field values](#) (established in SPAdmin), a message appears when inserting data from an order and a matching entry already exists for the key field only. The following options are provided: **Replace**, **Insert** and **Cancel**. Validation of duplicate data in a lookup entry is based on exact match, including spaces and any other characters, but is not case-sensitive.



Click **Replace** to update the existing entry. Click **Insert** to add a new entry. Click **Cancel** to return to the order with no changes.

When a Lookup table does not allow duplicate key field values (established in SPAdmin), a message appears when inserting data from an order and a matching entry already exists for the key field only. The following options are

provided: **Yes** or **No**. Validation of duplicate data in lookup entry is based on exact match, including spaces and any other characters, but not case sensitive.



Click **Yes** to update the existing entry. Click **No** to return to the order with no changes.

Note: When updating entries involving formulas, if user-entered text exists in a field with a formula, the formula entry in the Lookup dialog is updated to the text entry when replaced. If a formula exists in a field without user-entered text, the text entry in the Lookup dialog is updated to the formula entry when replaced.

Deleting Lookup Entries

Users can delete entries from the lookup grid the **Lookup Table Entries** "Delete" permission is granted and the lookup table [allows edit](#).

To delete an entry in the lookup table, select one entry at the beginning of the row.

1. Press the **Delete** key. A prompt appears to confirm the deletion.
2. Respond **Yes** and the entry is removed from the grid and deleted when the order is saved.
3. Respond **No** and the entry remains displayed in the grid and no changes occur.

Duplicate Entries

Duplicate entries are not allowed. Evaluation for duplicate data is based on exact matches including any spaces and other characters but is not case-sensitive. Upon saving, a prompt appears if duplicate entries exist. Click **OK** on the error provided to be returned to the Lookup dialog with the duplicate entries noted by a glyph. Hovering over the glyph also displays the error message. The order cannot be saved until duplicate entries have been corrected.



Cascading Entries

A succession (cascade) of lookup entries may be retrieved into an order when a data value populated by a column in one lookup table matches the data value in the key field of another lookup table. For example, the ZIP code table may contain the ZIP Code, City and State. The City table may contain the City, Civil Division and Civil Division Title. Retrieve an entry from the ZIP code table and the entries from **BOTH** lookup tables populate the order if the data in the City columns match. Users may establish lookup tables to cascade in succession through any number of entries.

Note: Pressing **F2** in the key fields clears only the data related to the specific table. Cascading entries are not cleared.

Data Handling when Retrieving Lookup Entries

Lookup entries always display as user-entered text on retrieval. In most cases where text already exists in the field, a lookup entry overwrites the text.

Blank entries: Blank lookup entries overwrite existing data in a field to blank.

Invalid entries: Some fields may accept data from the lookup table that is not valid for the field. These fields display the invalid entries and you will need to correct them. Examples are phone numbers, ZIP codes, tax IDs and State fields.

Fields Containing Drop-Downs: Lookup entries only populate a drop-down field if the value exists in the drop-down. If the value does not exist in the drop-down, the field is left blank. When system-generated or user-entered data exists in the drop-down, a blank or invalid entry also typically overwrites the field with a blank. These same rules apply to entries containing Order Contact Codes (for example, L, T or U), Invoices and HUD-1 or HUD line values.

Checkboxes: Valid entries in a lookup table for checkboxes are **True** to check, **False** or blank to leave unchecked.

Using Prompts in Lookups

When lookup entries include prompts, and an entry is retrieved via any method except **Retrieve Entry (With Field Codes)**, the quick prompts dialog(s) appear. Answer the prompt(s). Click **OK** to continue. The responses appear in the order.

Select the **Retrieve Entry (With Field Codes)** option to retrieve the prompts as text-only.

Express Order Entry

Rush order: Select the Rush order check box to indicate that the order needs to be expedited.

Exclude order from IRS submission: Check this option to prevent title only or single-side closings from being exported to 1099 and reported to IRS.

Auto-Publish to SoftPro Live: Relays order information to the SoftPro Live system when the order is saved.

SoftPro Live template: Allows the user to specify the template that will be applied to the order by the SoftPro Live system.

Transaction type: Select the appropriate transaction type. In the Express Order Entry screen, you can classify an order's transaction type as **Purchase, Refinance, Equity,** or **Other**. However, these three options do not always cover all scenarios. A title company may want to prepare a preliminary title report for an agent, for example. For reporting and tracking purposes, these orders are classified as **Other**.

Commercial, Construction, Cash sale: Select one of the following options.

1. **Commercial:** Select when the closing is on a commercial property. Enter the Project name when the commercial option is selected.
2. **Construction:** Select when the closing is new construction.
3. **Cash sale:** Select when the closing is an all cash deal.
4. **Out of county:** Indicates that the property is not in the county where the office is located.
5. **Restricted:** Only visible when you are working with a template. Once the field is checked in a template, only users granted both **Edit Templates** permission and **Edit Restricted Templates** permission will be able to edit the template when it is open again.

Order type: Click the drop-down arrow to select an order type. The administrator creates the order types that display in this drop-down. For example: Title Only, Title and Escrow or Escrow Only.

Product type: Click the drop-down arrow to select a product type. The administrator creates the product types that display in this drop-down.

Policy type: Click the drop-down arrow to select a Policy type. The administrator creates the policy types that display in this drop-down.

Related order(s): This field is used to record a previous or related order number. For example, it may be useful to cross-reference the current file with another file involving the same property or same customer. The related order number can be entered in the ProForm Search screen to locate this order.

Sales price: Enter the contract sales price.

Earnest Money grid: enter the earnest money and any applicable related information. For a breakdown of the grid [click here](#).

Show deposit/earnest money as required in RESPA regulations: If the option is checked and the earnest money deposit is retained by a listing or selling agent, the total commission on line 703 reflects the difference between the agent's commission and the portion of the earnest money retained and the portion of the earnest money retained appears on line 506.

If the option is unchecked, line 703 reflects the total commission and the earnest money deposit is not disclosed on line 506.

Note: Use this option at your discretion. RESPA regulations require you to show the deposit retained on line 506.

Description: Indicates deposit or earnest money.

Deposit Amount: As soon as you add a deposit amount the grid expands by one line.

Amt. Returned to Buyer: Enter the amount, if any, to be returned to the buyer.

HUD-1 Line: This line reflects where on the HUD the earnest money will be shown (it has to be shown in the 200 section).

Received From: This will always be a buyer in the order.

Retained By: Options include:

- Listing Agent/Broker
- Seller
- Selling Agent/Broker

Portion Retained (506): Deposit retained – if money is retained by agent (or by anyone who isn't the settlement agent), the amount retained goes on this line.

Excess Deposit (501): If money retained by agent (or by anyone who isn't the settlement agent) is greater than the commission to that agent, and the agent gives that excess amount directly to the seller outside of closing, that excess amount goes on this line.

Disb. As Proceeds (507): Disbursed as proceeds – if money is retained by the settlement agent, that amount shows up on this line as a note.

Settlement date/time: Select the settlement date from the drop-down. The default time of **12:00AM** displays. Enter the correct time.

Estimated date/time: Select the Estimated date/time check box when the date and time entered are not definite.

Due date/time: Click the drop-down arrow to select the due date and time.

Property address: Enter the street address in the Property Address fields. Enter the **City, State, and ZIP Code** below the street address. The In the fields below the city, state, and ZIP code are for specifying the county or parish.

Foreign: Check to use an address format other than a standard United States address format (e.g. an address in Mexico). Checking this box changes the City, State and ZIP code fields to one text box to enter the information.

Foreign address (text box): Enter the foreign address. For example, if the address is:

Sra. Otilia Ramos Perez
Urión 30
Col. Atlatico
77520 CANCUN, Q. ROO
MEXICO

Check the **Foreign** checkbox and enter the address as follows:

Address:

 Foreign

See [Spanish Characters](#) for more information.

APN/Parcel ID: An Assessor Parcel Number (APN) is a unique number assigned to each tract of land by a tax assessor. The APN can be used within an assessor's records to identify the land and view a plat, if one exists. A **parcel ID** is a number based upon the public land survey system (PLSS) grid.

Tax/Map ID: The tax/map ID and parcel ID are optional values entered only if the map and parcel numbers are required on any printed document.

Escrow brief legal: Enter a brief legal description.

Loans: The loan information grid displays basic loan information from the Loan Information & Funding screen. Principal amount of loan and Lender information can either be entered in the fields below the grid on the Express Order Entry screen or directly on the Loan Information & Funding Screen.

Principal amount of loan: Enter the principal amount of the new loan. If there is a construction loan, enter the full amount of the construction loan.

Lender: Enter the lender associated with the loan entered above.

Order Contacts: All parties in an order, such as the Abstractor, Appraiser, Buyer/Borrower, Seller, Lender, Settlement Agent, and Underwriter, are entered on the Order Contacts screen in ProForm. Regardless of the type of contact you want to add, you will do so by accessing the Order Contacts screen in ProForm first.

Order Contacts screen: The Order Contacts screen displays all of the contacts involved with the order. The contacts appear in a grid that can be sorted by clicking on any column heading. (By default, contacts are sorted by Type). To view detailed information for a contact, double-click the contact in the grid.

Notes: Use this field to enter notes about the order. The Notes grid can store multiple notes about the order created by different users. Each row in the grid displays information about a note, including the user that created a note, the last modified date, and the note text. Double-click a note to expand it. See [Order Notes](#) for more about the Notes grid.

Order Information

Project name: The project name for the commercial deal.

Email subject line: You can send e-mail messages from SoftPro Select to deliver documents or status information to clients. This email subject line is used as the default subject for any e-mail message sent from the order. The field has a system default, but you can place a formula on this field in your template in order to customize the value.

Ownership profile: This defaults to the profile name that has been selected as the “Orders created as” profile in SPAdmin for the active profile. If the ProForm order needs to be associated with another profile, the Ownership profile field can be changed. **NOTE:** This field is disabled after funds have been disbursed to any revenue contact on the order.

Borrower signing date: Date the borrower has signed documents. Only available when the [West Coast-specific option](#) is checked in the Profile Management screen.

Seller signing date: Date the seller has signed documents. Only available when the [West Coast-specific option](#) is checked in the Profile Management screen.

Settlement date/time: Click the drop-down arrow to select the settlement date. The default time of **12:00 AM** displays. Enter the correct time.

Estimated date/time: Select the Estimated date/time check box when the date and time entered are not definite.

This order has a rescission period: When selected, this indicates that a rescission period applies. Also enables the **Rescission date** field.

Rescission date: The rescission period (related to loan documents). When a loan contains a rescission option, also called the “Notice of Right to Cancel”, this gives the borrower(s) three business days from the signing date to cancel the loan. This is called the rescission period.

“The rescission date is midnight of the third business day after the documents are signed, the date the borrower receives the Truth in Lending Disclosure or the date the borrower received the Notice of Right to Cancel, whichever occurs last”.

Note: Business days include any day of the week except Sunday and all federal legal holidays. In some cases Saturday may not be considered a business day. Some lenders may use varying dates when calculating their

rescission, so if in doubt, call them. In the event a signing is performed on a federal legal holiday the rescission period will begin on the next business day. This is only applicable for loans being refinanced.

Include Saturday in rescission period: Select Include Saturday in rescission period only when Saturday is to be included in the time period.

Disbursement date: Click the drop-down arrow to select the disbursement date. **Note:** If the Settlement type selected for this closing is **Purchase**, the default Disbursement date is the settlement date. If **Refinance** or **Equity** is selected, the 3-day rescission period will be included in the calculation of the disbursement date. The disbursement date will print on the HUD-1 Settlement Statement just below the settlement date on the first page (or just to the right of the settlement date on the HUD-1A form).

Proration date: Click the drop-down arrow to select the proration date. **Note:** The Proration date defaults to the Disbursement date.

Charge buyer for proration date in all prorations: Select the Charge buyer for Proration Date in all Prorations check box if the buyer is to be charged for the day of proration in the proration of taxes and other prorated charges.

Escrow office/Closer: Click the drop-down arrow to select the escrow office or closer for the order.




Pre-closer/Escrow assistant: Click the drop-down arrow to select the closer or assistant if applicable.

Title office: Click the drop-down arrow to select the title office if applicable.

Title officer/Examiner: Click the drop-down arrow to select the office or examiner.

Notes

Use this field to enter notes about the order. The Notes grid can store multiple notes about the order created by different users. Each row in the grid displays information about a note, including the user that created the note, the last modified date, and the note text. Double-click a note to expand it. See **Order Notes** for more information about the Notes grid.

- To add a new note, click .
- To delete a note, select it and click .
- To search the notes for text, click  and then specify the text you are searching for.

Note: Grid functions can also be accessed by right-clicking inside the grid and choosing from the menu that appears.

Status

This screen provides information on an order's status.

Who has the File: Click the drop-down arrow to select the name of the individual who has the physical file folder for this order.

Date/Time: Click the drop-down arrow to select the date the physical file folder was transferred to the person who has it. Next, enter the time the physical file folder was transferred. When escrow has been closed, the user name and the date/time stamp automatically writes to the order history log.

Purpose: Enter the purpose for which the physical file folder is in the possession of its current holder. Clicking Purpose displays the "HasFilePurpose" lookup table.

Order Status

The following fields comprise the **Order Status** section of the **Status** window.

Field	Description
Date/time order reserved	Displays the date and time the order was reserved
Reserved by	Indicates who reserved the order.
Date/time order received	Click the drop-down arrow to select a date and enter a time. Defaults to current system date and time for a new order but can be overridden.
Received by	Click the drop-down arrow to select the name of the individual who received the file.
Order status	Select a status from the drop-down list: In Process -The order is currently being processed. Hold -The order is on hold until further notice. Closed - The order has been closed. Completed -The order has been completed. Canceled -The order has been canceled. Duplicate - A duplicate status is entered when two identical orders are entered by different people. The order created with no money received or with the least amount of information is marked as a duplicate. Note: You can scroll through the list of choices using the Up Arrow and Down Arrow keys.
Date/Time order completed	This option is only available when Order status is defined as Completed .
Completed by	This option is only available when Order status is defined as Completed .
Order lock status	Select Locked or Unlocked from the drop-down list.
Comments	Enter any additional comments regarding the status of this order.

Title Status

The following fields comprise the **Title Status** section of the **Status** window.

Field	Description
Title Office	Click the drop-down arrow to select the title office for the order.
Title officer/Examiner	Select a name from the drop-down list.
Date/Time title opened	Click the drop-down arrow to select the date and time the title was opened.
Opened by	Select a name from the drop-down list.
Title status	Select a status from the drop-down list: In Process -The title is currently being processed. Hold -The title is on hold until further notice. Completed -The title has been completed. Canceled -The title has been canceled. Recorded -The title has been recorded. Note: You can scroll through the list of choices using the Up Arrow and Down Arrow keys.

Date/time title closed	This option is only available when Title status is defined as Completed .
Completed by	This option is only available when Title status is defined as Completed .
Comments	Enter any additional comments regarding the status of the title.

Escrow Status

The following fields comprise the **Escrow Status** section of the **Status** window.

Field	Description
Escrow Office	Click the drop-down arrow to select the escrow office for the order.
Escrow officer/Closer	Select a name from the drop-down list.
Pre-closer/Escrow assistant	Select a name from the drop-down list.
Date/Time escrow opened	Click the drop-down arrow to select the date and time the escrow was opened.
Opened by	Select a name from the drop-down list.
Escrow status	<p>You can select "auto-close of escrow" by turning on the preference. Select a status from the drop-down list:</p> <p>In Process-The escrow is currently being processed.</p> <p>Hold-The escrow is on hold until further notice.</p> <p>Closed-The escrow has been closed.</p> <p>Canceled-The escrow has been canceled. Escrows are NOT automatically closed when an order has been cancelled.</p> <p>Note: You can scroll through the list of choices using the Up Arrow and Down Arrow keys. Press F2 in the Escrow status field to clear the field.</p>
Date/Time escrow closed	This option is only available when Escrow status is defined as Closed .
Closed by	This option is only available when Escrow status is defined as Closed . When escrow has been closed, the user name and the date/time stamp automatically writes to the order history log.
Escrow lock status	You can select " auto-close of escrow " by turning on the preference. Select Locked or Unlocked from the drop-down list.
Comments	Enter any additional comments regarding the status of the escrow.

Property

Properties

The Multiple Properties screen lists the properties entered for this order. The number of properties appears in parenthesis on the title bar. Click the title bar to view the Grid. Click a property in the Grid to view it on the screen. See [Adding Property](#) or [Deleting Property](#) for more on using the Multiple Properties Grid.

Property drop-down: This drop-down list is displayed on a number of screens in ProForm. It defaults to 1 for the first CDF or HUD. If multiple CDFs/HUDs have been added to the order, this drop-down is used to switch between them.

Property address: Enter the street address in the Property Address fields. Enter the City, State, and ZIP code below the street address. The fields below the City, State, and ZIP code are for specifying the county or parish.

County/City GLC: These fields are available for specifying County and City Geographic Locator Codes (GLC).

Foreign: Check to use an address format other than a standard United States address format (e.g. an address in Mexico). Checking this box changes the City, State and ZIP code fields to one text box to enter the information.

Foreign address (text box): Enter the foreign address. For example, if the address is:

Sra. Otilia Ramos Perez
Urión 30
Col. Atlatico
77520 CANCUN, Q. ROO
MEXICO

Check the **Foreign** checkbox and enter the address as follows:

Address:

 Foreign

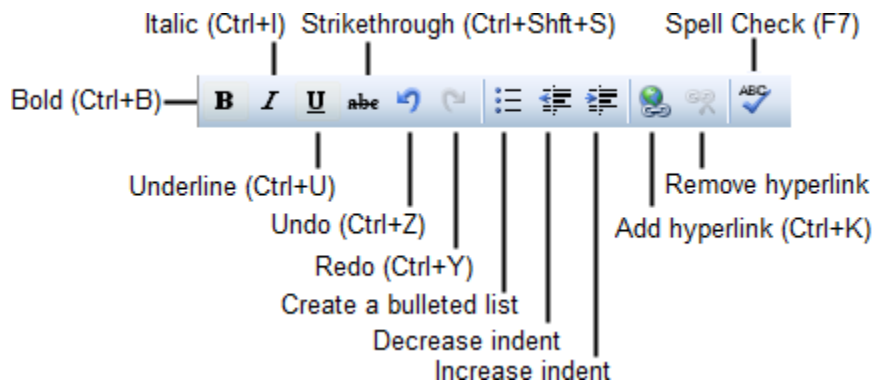
See [Spanish Characters](#) for more information.

Escrow brief legal lookup code: Enter a code to retrieve a brief legal description from the lookup table.

Escrow brief legal: Enter a brief legal description.

Escrow legal lookup code: Enter a code to retrieve a legal description from the lookup table.

Escrow legal: Enter the escrow legal description. See [Entering an Escrow Legal Description](#). You can type information directly into the field and use the **toolbar** to format text, add bullets, indent, and spell check.



Copy from Title Legal: Click Copy from Title Legal to copy the legal description from the Title Legal Description screen.

Print as attachment: Click the Print as attachment checkbox to have the legal description print as an attachment on standard ALTA documents.

APN/Parcel ID, Tax/Map ID: The tax/map ID and parcel ID are optional values entered only if the map and parcel numbers are required on any printed document.

Lot number(s): Enter the property lot or unit number(s). This information is commonly used in the brief legal description of the property.

Block, Section, Phase: If property is identified by lot, block, section, and/or phase, enter the information here.

Subdivision/Tract: Enter the subdivision name.

HOA: Select an HOA company from the drop-down to associate a homeowner's association contact with a property. If there is only one HOA in the order, this is the default. If there are multiple contacts, select the appropriate contact.

HOA Management Co.: Select an HOA Management Company from the drop-down to associate a homeowner's association management company contact with a property. If there is only one HOA Management Co. in the order, this is the default. If there are multiple contacts, select the appropriate contact.

Acreage: Enter the acreage of the property.

Census tract #: Enter the census tract # information if the property is identified by a census tract. Census tract data is commonly used in property appraisals and, if applicable to the property, this information will be found on the Uniform Residential Appraisal form.

Map reference: Enter the Map Reference number if available. Map reference numbers are commonly used in property appraisals and, if applicable to the property, this information will be found on the Uniform Residential Appraisal form.

Date recorded: Enter the date or time this assignment was recorded.

Recorded at/in: Enter where the assignment was recorded.

Unit number(s): Enter the property lot or unit number. This information is commonly used in the legal description of the property.

Building: If property is identified by lot, block, section, and/or phase, enter the block/building number here.

Parking spaces: Enter parking space numbers or other identifying information regarding parking lots allocated to this property.

Condo: Enter the condominium name.

PUD: Enter the Planned Unit Development name.

Declaration: Enter the declaration information for the corresponding addition, subdivision, condominium, or PUD name.

Co-op name: If the property type is **Cooperative**, enter the name of the cooperative owner's organization.

Co-op interest: If the property type is **Cooperative**, enter the amount of the ownership interest percentage.

Property type: Select **Single Family**, **1-4 Family**, **PUD**, **Condo**, **Cooperative**, **Unimproved**, **Vacant Land**, or **Other** to describe the property type. By default, **Single Family** is selected. Use the accompanying field to enter a description if **Other** is selected.

Property use: Select **Residential**, **Commercial**, **Non-Residential**, **Unknown**, or **Other** to describe the use of the property. By default, **Residential** is selected. Use the accompanying field to enter a description if **Other** is selected.

Land is zoned as: Enter a description of the zoning status of the property (for example: Residential).

Occupied by: By default, **Owner** is selected as the property occupant. Select **Tenant**, **Unimproved**, or **Unknown** if the owner is not the occupant.

Primary residence: Select this checkbox if the property is used as a primary residence.

Years continuously resided: Enter the number of years the property has been continuously used as the primary residence.

Personal property: Enter information regarding personal property being conveyed (for example: appliances, fixtures, curtains, furniture, etc.). **Note:** Use this field to describe appliances conveyed in conjunction with a VA loan closing.

Amount: Enter the total value of personal property.

- **Include on CDF:** This box is only visible on CDF orders, and when checked, will send the amount to CDF lines **K.02/M.02.**

HUD Line: Select the HUD-1 Settlement Statement line number on which you want to include the personal property amount. **Note:** Line 102 of the HUD-1 Settlement Statement is generally used to disclose the personal property amount. Click **Edit** to jump to the selected HUD Line.

Section: Enter the section number. Note: The Section, Township, Range and Parcel fields are for those states using the Section/Township/Range/Qtr.-Qtr. system of title indexing.

Township: Enter the township number and the township direction:

- **N: North**
- **S: South**
- **E: East**
- **W: West**

Range: Enter the range number and the range direction; N, E, S or W.

Parcel: Select a parcel section to include it in the Section/Township/Range/Qtr.-Qtr. record.

Survey

Date of survey: Select the date the survey is completed.

Surveyor: Select or add surveyor from the drop-down list.

Contact: Select or add a contact from the drop-down list.

Survey fee: Enter the dollar amount for the fee.

Improvements not shown on survey: Enter any information here if applicable.

Encroachments indicated on survey: Enter any information here if applicable.

Appraisal

Appraiser: Select an appraiser from the drop-down list of contacts entered in this order.

Contact: Select or add a contact from the drop-down list.

Appraisal date: Enter the date of the appraisal.

Appraisal Type: Select the type from the drop-down list.

Other description: This field is enabled when Appraisal type is set to Other.

Land value: Enter the appraised value of the land.

Improvements: Enter the value of improvements made to the property.

Appraised value: This field defaults to the sum of the **Land Value** plus **Improvements**.

Year dwelling built: Enter the year the dwelling on the property was built.

Square footage: Enter the total square footage of the property.

Torrens certificate #: Enter the Torrens Certificate Number, if applicable. A Torrens Certificate Number is a certificate of property ownership issued by government agencies in some states.

Manufactured Housing

Decal (license) number: Enter the decal number of the manufactured home.

DOH number: Enter the Department of Highway Number.

Manufacturer name: Enter the name of the manufacturer.

Manufacturer trade name: Enter the trade name of the manufacturer.

Model: Enter the model name.

Model number: Enter the model number.

Make: Enter the brand name.

Width, Length: Enter the measurements for the manufactured home.

Date manufactured: Enter the date of construction of the manufactured home.

Serial number: Enter the serial number of the home.

Park name: Enter the name of the mobile home park.

Space/Lot number: Enter the space or lot number.

Date first sold: Enter the original date of sale of the manufactured home.

Bill of sale vesting: Enter the bill of sale vesting information.

Notary & Acknowledgment

Notary Name: Enter the notary's name or click Notary Name to select a notary from the Lookup table.

Notary Public for: Click the arrow to select a jurisdiction, then enter the name of the jurisdiction and select a state.

For example, if the person is a notary public for the city of Raleigh, click the arrow to select City. Then enter Raleigh in the next field and enter NC in the State field.

Commission Expires: Enter the commission expiration date.

Commission Number: Enter the notary commission number.

Include Notary Information in Acknowledgment Section of Documents: Select this option to have the notary information from this file fill in the printed notary sections of documents. By default, this option is not selected.

Date of Acknowledgment: Enter the date on which the acknowledgment was signed and notarized.

Acknowledged in the: Click the arrow to select a jurisdiction, then enter the name of the jurisdiction and select a state. For example, to enter the city of Raleigh, click the arrow to select City. Then enter Raleigh in the next field and enter NC in the State field.

Witness Names: Enter the names of witnesses if your state requires witnesses to the signing of notarized documents. In the Notary Witness name field, enter the name of the witness to the notary's signature if required by the laws of your state.

Buyer/Borrower Acknowledgment: Enter the Buyer/Borrower Acknowledgment in the large scrollable field, or enter a Lookup Code to retrieve an entry from the Lookup table. Click **Lookup Code** or press **F9** to select an entry from the table. See Lookup Tables for more information about storing and reusing information.

Seller Acknowledgment: Enter the Seller Acknowledgment in the large scrollable field, or enter a Lookup Code to retrieve an entry from the Lookup table. Click **Lookup Code** or press **F9** to select an entry from the table. See Lookup Tables for more information about storing and reusing information.

General Acknowledgment: Enter the General Acknowledgment in the large scrollable field, or enter a Lookup Code to retrieve an entry from the Lookup table. Click **Lookup Code** or press **F9** to select an entry from the table. See Lookup Tables for more information about storing and reusing information.

Jurat: In the large scrollable field enter the Jurat, or part of the affidavit stating where, when, and before whom, the affidavit was sworn. Enter a Lookup Code to retrieve an entry from the Lookup table. Or, click **Lookup Code** or press **F9** to select an entry from the table. See Lookup Tables for more information about storing and reusing information.

Instrument Prepared By: Click the arrow to select a contact that is the preparer of the instrument. **Note:** After selecting, you can click the link to go to the contact information screen to view or change contact information. In the **Contact** field, click the arrow to select a person.

After Recording Mail To: Click the arrow to select a contact to which the acknowledgment should be sent after recording. In the next field, click the arrow to select a person.

Send Tax Statements To: Click the arrow to select a contact to which the tax statements should be sent. In the next field, click the arrow to select a person. These fields will only be available when the ProForm Order Option for **“Show West Coast-specific”** is checked in SPAdmin Profiles.

Deed

When you create a deed, all properties are associated with a deed by default. You may still disassociate them if necessary.

Deeds grid: The Deeds Grid lists the deeds entered for this order. The number of deeds in the order appears in parenthesis on the Deeds bar. Click the **Deeds** bar to view the Grid. Click a deed in the Grid to view it on the screen. To use the up and down arrows in the Deed grid a user must have both Add and Delete permissions granted. Click a deed in the Grid to view it on the screen. See [Adding a Deed](#) or [Deleting a Deed](#) for more.

Instrument Type: Select the official name of the document conveying ownership to the present owner (seller): e.g., Warranty Deed or Quit Claim Deed. Additional Instrument types can be added in SPAdmin in the Drop-down Lists manager.

Instrument date: Enter the date of the instrument.

Date/Time recorded: Enter the date and time the instrument was recorded in the Official Records.

Place recorded: This field will fill in with the information entered into the six Recorded At/In fields. Each set of two Recorded at/In fields will be separated by a comma. The default entry can be edited. For instance, suppose the following information appears in the six Recorded At/In fields Book 1 Page 1 Document 1. The following would appear by default in the Place Recorded field: Book 1, Page 1, Document Number 1.

Place re-recorded: Enter re-recording data or any additional information about the recording of this document.

Consideration amount: Enter the sum to appear as the consideration amount on the deed.

Instrument prep by: Enter the code of the individual who prepared the deed.

Contact: Select or add contact information from the drop-down list.

Grantor: Enter the full name of the grantor in the scrollable field, and the address and phone number in the fields provided.

Forwarding address: Enter an address including the street number, city, state, ZIP code, phone number and extension. **Note:** When the Foreign checkbox has been selected, the **Phone/Home/Fax/Cell/Pager** number fields change, allowing for a foreign formatted number to be entered.

City/State/Zip: Enter the property address, state and ZIP code.

County: Enter the name of the county.

Phone/Ext.: Enter the phone number and extension if applicable.

Foreign: Check to use an address format other than a standard United States address format (e.g. an address in Mexico). Checking this box changes the City, State and ZIP code fields to one text box to enter the information.

Foreign address (text box): Enter the foreign address. For example, if the address is:

Sra. Otilia Ramos Perez
Urión 30
Col. Atlatico
77520 CANCUN, Q. ROO
MEXICO

Check the **Foreign** checkbox and enter the address as follows:

Address:

 Foreign

See [Spanish Characters](#) for more information.

Grantor signature: Enter the grantor signature line in the large scrollable field, or enter a Lookup Code to retrieve an entry from the Lookup table. These will be printed on the warranty deeds, deeds of trust, and promissory notes. Or, click **Lookup Code** to select an entry from the table.

Grantor acknowledgment: Enter the grantor acknowledgment in the large scrollable field, or enter a Lookup Code to retrieve an entry from the Lookup table. These will be printed on the warranty deeds, deeds of trust, and promissory notes. Or, click **Lookup Code** to select an entry from the table.

Grantee: Enter the full name of the grantee in the scrollable field, and the address and phone number in the fields provided.

Forwarding address: Enter an address including the street number, city, state, ZIP code, phone number and extension.

Mail deed to grantee after recording: Check this box to mail the deed to the grantee after recording the deed.

Legal description(s): This table contains the list of legal descriptions associated with particular property addresses entered in this order. These are automatically associated when you create a deed. Click the checkbox in the Select column to associate or disassociate a property with the current deed.






Restrictions, Easements, and Exceptions

This field contains a hierarchical structure, similar to a family tree, of restrictions, easements, and exceptions. The Lookup code for each item is shown, along with a description.

Numbering scheme: Select from numbers, letters or roman numerals. This is the numbering scheme that appears in your documents.

Begin Restrictions/Easements/Exceptions at: Once you select an option from the drop-down, the **Begin Restrictions/Easements/Exceptions at fields** will become available. Applicable when you have hard-coded requirements or exceptions on a document and you want to see how the ones on screen will be numbered. This does not affect how the document prints. For example, you can have 3 hard-coded requirements on a doc and enter 5 in the Begin Requirements at field. The doc will number correctly with the first one entered on screen starting at 4. The screen will show 5 since 5 was erroneously on screen.

- To move an item within a folder in the tree, select the item and click the arrow buttons.

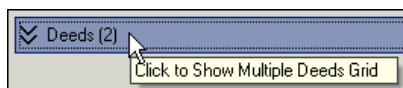
- To add a new item, select the folder in the tree where you want to insert it and click .
- To add multiple items from an existing lookup table click the Quick Add Icon . See [Quick Add Dialog](#) for more.
- To delete an item, select it and click . **Note:** to delete an item, users must have Edit permission in SPAdmin.
- To copy or paste a restriction, easement or exception, right-click it and select Copy Restriction, Easement or Exception or Paste Restrictions, Easement or Exception from the pop up menu.
- To modify an existing restriction, easement or exception double-click the item to edit. See [Editing a Restriction, Easement or Exception](#) for more information.
- To import an item from another document, select the place in the tree where you want to insert it and click . See [Importing Restrictions, Easements and Exceptions](#).
- To **preview an item**, click the Preview Pane button  on the toolbar and then highlight the desired item. The preview pane will display the text and properties of that item. To close the preview pane, click the Preview Pane button again to hide the preview pane.

Adding a Deed

1. Click the ProForm Program Tab.



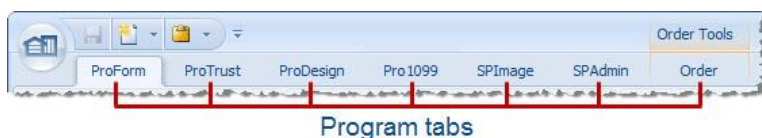
2. Select the Deed screen.
3. Click Deeds to show the Multiple Deeds grid.



4. Click Add Deed.
5. Enter deed information on the screen. See [Deed](#) for help with the fields on the screen.

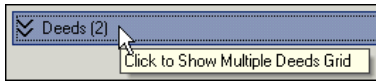
Deleting a Deed

1. Click the **ProForm Program Tab**.



2. Select the **Deed** screen.

3. Click **Deeds** to show the Multiple Deeds grid.



4. Select the deed you want to delete.
5. Click **Delete Deed**.

Affidavit

Property: If there are multiple properties with this order, you can enter affidavit information on this screen for each property. Click the arrow to select a property. Then view or edit the affidavit information for that property on the screen.

Affidavit date: Enter the date of the affidavit/agreement regarding liens document.

General contractor: Select a contractor from the drop-down list. Select **<Add New>** to add a new contact. The Add Item dialog appears with the option to select Builder, General Contractor, or Subcontractor. **Note:** After selecting, the Order Contacts information screen will open. Once information has been added and you return to the Affidavit screen, the contact name will appear next to the code as a hyperlink. You can click the hyperlink to view or change the contact information.

Waiver of liens date: Enter the date of the waiver of liens document.

Consideration amount: Enter the amount of consideration.

Outstanding claims: Enter any outstanding claims information including but not limited to the principal amount of claim, labor or materials furnished, and the name of the lien claimant.

Labor or materials: Use this scrollable field to enter the names of an individuals or companies that supplied labor and/or materials.

Check all that apply: Select the checkboxes that apply. The corresponding sections on the affidavit and agreement regarding liens and the waiver of liens will be checked.

Affiant signature: Enter a **Lookup Code** to retrieve an entry from the Lookup table, or manually enter the Affiant signature setup. **Note:** See Lookup Tables for more information about storing and reusing information.

Acknowledgment: Enter a **Lookup Code** to retrieve an entry from the Lookup table, or manually enter the Acknowledgment setup. **Note:** See Lookup Tables for more information about storing and reusing information.

Invoice

In SoftPro Select, one or more invoices can be created for each order. On a title-only order, the invoice is a “real” invoice which is typically exported to a separate accounts receivable (A/R) application for collection. On an escrow order, the invoice might be a quote or for information only, which would not be exported to the A/R application. On escrow orders, revenue detail is instead exported from the disbursement of settlement fees to the escrow company.

INVOICE NUMBER SAVE VALIDATION

You can send title premiums, endorsement fees, and additional title charges to an invoice by selecting the invoice number in different areas in ProForm:

- The invoice number can be entered on the **Title Insurance Premium** screen, **Endorsements** screen and the **Additional Title Charges** screen.
- The invoice number can be entered directly on the **HUD-1 line Payee** grid in which the fee is sent to accommodate splitting fees and sending them to different invoices.

The invoice number can be entered in the HUD-1 line Payee grid in which the fee is sent to allow splitting fees and sending them to different invoices. If you enter an invoice number for the same fee on the screen and in the HUD-1 line Payee grid, the fee is sent to the invoice twice. When this occurs, a message appears when you save the order.

- A **warning** appears when the invoice number is different, for example, when you split fees in the Payee Grid and send the fees to different invoices.
- An **error** message appears when the invoice number is the same. Duplicate invoice numbers must be corrected before saving the order.

Invoices

Invoice number: Enter the invoice number.

Status: Indicates the state of the invoice. The field defaults to Pending and is not editable. Once the invoice status changes, it is written to the order history. The invoice will be disabled when the status is sent or canceled. The Invoice Payments and Notes section of the screen will still be enabled in these instances. A user with the **Status** field correction permission will have the option to change the status after the status is changed to **Sent** or **Canceled**.

To further prevent updates to the Invoice when an Invoice has a status of **Sent**, fields associated with the fees sent to the Invoice are disabled. In addition, the Invoice drop-down has a new column called **Status** that will contain the data in the status field of the corresponding Invoice. If an Invoice has a Status of **Sent** or **Canceled**, the following message will appear if the Invoice number is selected from the drop-down: The selected Invoice has already been sent or canceled and cannot be selected. Please select a different invoice.

Invoice date: Enter the date to be printed on the invoice in the Invoice date field.

Days payment due in: Enter the number of days form the invoice date on which payment is due. The **Due date** field automatically calculates based on the invoice date and the number of days entered in the **Days payment due in** field. Limit is 3 characters (max=999).

Due date: Enter the due date. The due date automatically calculates based on the invoice date and the number of days entered in the **Days payment due in** field.

Bill to: Select the party being billed form the drop-down list. **Note:** After selecting, click **<Add New>** to go to the **Add Contact** dialog to view or change contact information.

Remit to: Select the party to whom payment is to be sent. **Note:** After selecting, click **<Add New>** to go to the **Add Contact** field, click the arrow to select a person.

Contact: In the contact field, click the arrow to select a person.

Invoice Detail Grid

Print to Invoice: A checked box indicates that the line will be included in the printed version of the invoice. This defaults to checked when a line item is entered.

Bill Code: A code used for accounting purposes to associate a debit or credit amount with a general ledger.

Description: Enter a description of this invoice item.

Amount: Enter the invoice amount. Negative numbers are accepted.

SPAdmin/Profiles/ProForm Order Options/Show.

Invoice message: Use this scrollable field to enter any comments to be printed on the bottom of the invoice.

Invoice Payments

Date Paid: Click inside the drop-down list to enter a date. This field automatically defaults to today's date.

Payment Description: Enter a description of the payment.

Reference Number: Enter a number to be associated with the payment (check number, money order number, etc.)

Payment Amount: Enter the amount of payment.

Notes: Enter any applicable notes.

Register

The register is a view into the ledger that corresponds with the order. On the Register screen, users can view pending transactions, including those generated by secured receipting and disbursing orders. Users can also view balance information, post pending transactions (including printing of checks), manage [construction draws](#), and access the transactions history.

A single register displays both receipts and disbursements on the same screen.

The register is for all orders where users need to receipt and disburse funds. Pending receipts and disbursements are automatically generated and recalculated as changes are made in the order. They are not automatically generated or recalculated with non-secured receipting and disbursing (non-SR&D) orders, register may still be used to post transactions (i.e. receipt funds, cut checks, etc.).

Balance Information

Order balance: balance of posted and printed receipts and disbursements from the ProForm order. Click the hyperlink to bring up the Order Balance Sheet report.

- **Incoming funds** - funds deposited from the ProForm order
- **Outgoing funds** - funds disbursed from the ProForm order
- **Total** - the total amount of incoming funds from the ProForm order minus outgoing funds from the ProForm order

Ledger balance: balance of posted and pending receipts and disbursements to the ledger

w/ Pending and Held: click this link to bring up the [Single Ledger Balance \(By trust accounting date with adjustments\) report](#)

- **Receipts** - total amount of funds deposited to the register from the order and directly to the ledger
- **Disbursements** - total amount of funds disbursed from the register through the order or directly from the ledger
- **Total** - the total amount of incoming funds minus outgoing funds

Ledger Information

Trust account: Each trust account has its own unique trust account code. Trust account codes are essential to the proper organization of ledgers and transactions in the ProTrust database. This information is linked to profiles; profiles may have more than trust account code.

Responsible party: Enter the name of the party responsible for disbursement. The default for this field is the Escrow Officer/Closer entered on the Order Information screen in ProForm.

Reminder date: Enter a reminder date for the purposes of running **Reminder Reports**. When running a Reminder Report, a prompt appears to enter a date range. All ledgers with reminder dates that fall within the range specified are included in the report.

Ledger comment: Enter any useful comments about the ledger such as special instructions about actions required if funds are being held in escrow, or details about the status of a ledger.

Locked: If the "**Auto-lock dormant ledgers**" option is selected in the Trust Accounts Manager, the Locked checkbox is automatically checked when the register becomes dormant. It is enabled only if the "Locked" field lock permission is granted. When it is enabled, users can manually select it to lock the register. If the "Locked" field unlock permission is granted, the checkbox remains enabled and users can unlock the register if needed.

Dormant: This checkbox is always disabled. It will automatically be selected if the register becomes dormant.

Exempt: The checkbox is only available if the register is dormant. With permission, this box can be checked to exclude it from dormant reports.

ProForm-generated transactions: When checked, pending receipts and disbursements are automatically generated and updated according to the information entered in a ProForm order.

- If a user has the edit permission granted, the ProForm-generated transactions checkbox can be unchecked regardless of whether transactions have been posted.
- Once a transaction has been posted, it cannot be checked again.

IOLTA: Select if this is to be an interest on lawyer's trust account ledger (IOLTA).

Transactions

TRANSACTIONS TOOLBAR

Add Transaction: Click this button to add a new transactions. Available options are:

- Incoming Wire
- Interest Credit
- Miscellaneous Credit
- Receipt
- Check
- Miscellaneous Debit
- Outgoing Wire
- CDF Transfer(-) *this option is only available when the order contains multiple CDFs*
- Ledger Transfer(-)
- HUD Transfer(-) *this option is only available when the order contains multiple HUD-1s*

Delete Transaction: Click this button to delete the selected transaction

Print and Post: Allows users to post pending transactions, print pending checks and/or disbursements, or reprint previously printed checks

- **Post** - select to execute the transaction
- **Print Pending Checks** - select to post any unexecuted check transactions and print the associated check forms
- **Print/Post Pending Disbursements** - select to execute pending disbursement transactions and print their associated transaction forms
- **Reprint Check** - select to reprint previously posted and printed check forms

Actions: Lists the options available for modifying the transactions within the transactions grid:

- **Reassign Transaction** - Allows you to post a disbursement to a different file.
- **Disburse Transferred Funds** - select to disburse and post any pending fund transfers
- **Show Deleted Transactions** - Shows any previously deleted transactions in the transactions grid.
- **Change Pending Transaction Type** - Allows you to change the transaction type on pending transactions. Once a transaction is posted, the type cannot be edited.
- **Generate Pending Transactions** - select this option to populate the register with pending transactions when the **Use ProForm-generated transactions** option is unchecked in the Accounting options of the Profiles settings in SPAdmin.
- **Restore Default Grid Layout** - Allows users to revert to the initial grid layout if it has been modified.

Reports: Allows users to print one of four available reports for the register:

- **Disbursement Summary** - a report itemizing all disbursements pending or posted associated with the ledger, printed from the Registry
- **Singled Ledger Balance Report** - prints transaction detail and balances for a single, specified ledger only. Depending on the report options selected, the report may or may not include pending and held transactions.
- **Transaction Form** - select to produce a form summarizing pertinent information for the selected transaction such as settlement agent, ledger id, property address, trust account code, etc. The option to automatically print this form when the transaction is posted can be checked from the transaction general information screen.
- **Transactions History** - contains a history of every posted transaction for the current ledger or ProForm order. All adjustments are included in the Transaction History.

Order Transactions: clicking this option directs the user to the [Order Transactions screen](#) in the Escrow/Closing section in ProForm.

Anticipated Wires: shows all receipts not yet received that were identified as an anticipated wire.

Transactions Grid

Status: The status type indicates:

- **Pending:** The transaction has not occurred yet but is anticipated to occur.

- **Posted:** The transaction has been executed.
- **Voided:** The transaction has been voided.
- **Held:** The transaction is on hold.
- **Stop Payment:** There is a stop payment on this transaction.

Type: Lists the transaction type (for example: miscellaneous credit, check or outgoing wire).

Ref. Number: The reference number appears if auto-numbering is turned on for receipts. Note: The Auto-numbering option is located on the Reference Numbering Manager tab in SPAdmin.

Trans. Date (Transaction Date): Defaults to either the trust accounting date, settlement date, or disbursement date, as selected in the Trust Account Manager in SPAdmin.

Amount: The dollar amount of the transaction.

Payee/Payor: Name(s) of the payee or payor associated with the transaction.

CDF/HUD-1: The column will be titled *CDF* or *HUD*, depending on order type, and will show the line this transaction is associated with in the ProForm file.

Cleared Date: The date the transaction cleared.

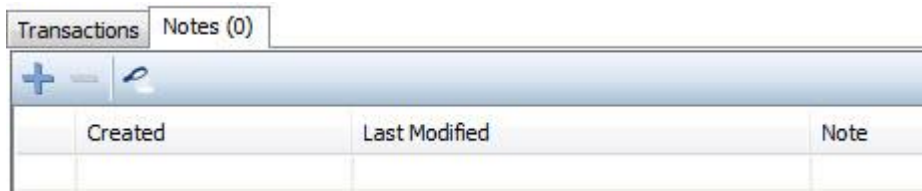
Dep. Number: The deposit number of the transaction if applicable.

Medium: Method of payment or debt such as bank check, cash, direct deposit, etc.

Trust Acct. Date: The Trust accounting date is automatically assigned by ProTrust to every posted transaction (**Pending** and **Held** transactions are excluded). This date will allow for an accurate accounting of all funds that are received and disbursed on any given day. You cannot modify the Trust accounting date for a transaction. Only a transaction date can be edited.

Notes

Several screens in SoftPro Select feature a Notes grid. Different users can save notes about an order or contact in Notes grids. Each Notes grid contains a title bar that displays the number of notes saved. [Click the Notes tab](#) to show or hide the notes grid.



Each row in the grid displays information about a note: the note status (internal and/or linked), the user that created a note, the last modified date, and the note text. Double-click a note in the grid to expand it.

NOTES TOOLBAR

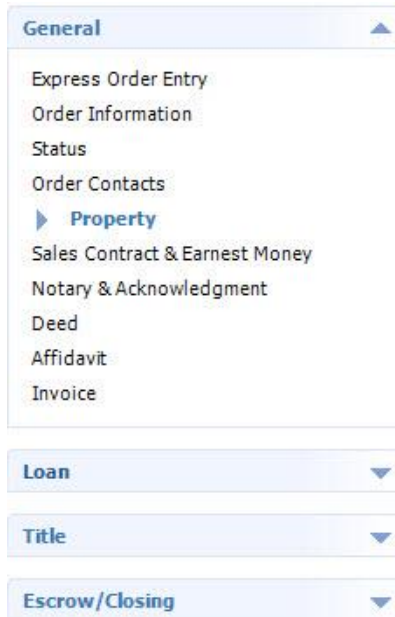
	Add	Add item.
	Delete	Delete selected item from the grid.
	Search	Search the notes grid for text.

Adding Property

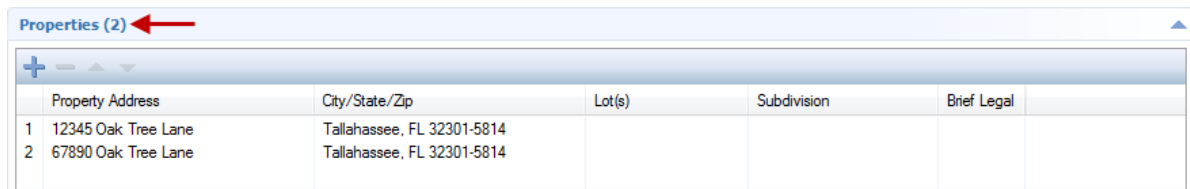
1. Click the **ProForm Program Tab**.




2. Select **General**, then **Property**.



3. Click **Properties** to show the Multiple Properties Grid.



	Property Address	City/State/Zip	Lot(s)	Subdivision	Brief Legal
1	12345 Oak Tree Lane	Tallahassee, FL 32301-5814			
2	67890 Oak Tree Lane	Tallahassee, FL 32301-5814			

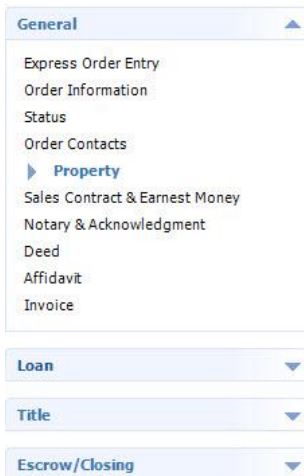
4. Click the **Add Property** button .
5. Enter information in the fields as needed. Click **Save** to save the new entry.

Viewing Properties

1. Click the **ProForm Program Tab**.



2. Select **General**, then **Property**.



3. Click **Properties** to show the Multiple Properties Grid.

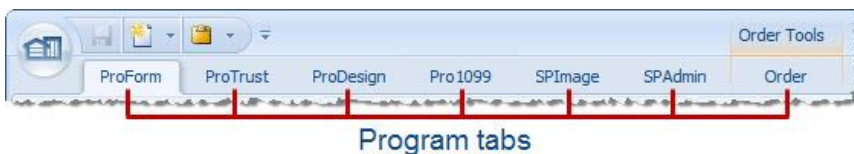
A screenshot of a window titled 'Properties (2)'. A red arrow points to the title bar. The window contains a table with the following data:

	Property Address	City/State/Zip	Lot(s)	Subdivision	Brief Legal	
1	12345 Oak Tree Lane	Tallahassee, FL 32301-5814				
2	67890 Oak Tree Lane	Tallahassee, FL 32301-5814				

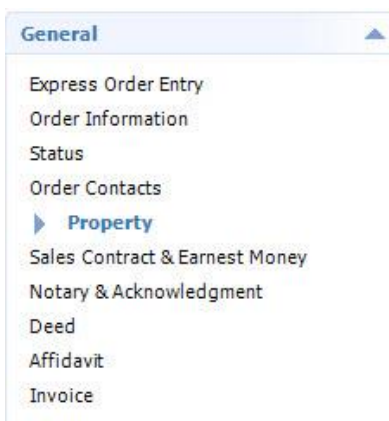
4. Double-click on the property you wish to view.

Deleting Property

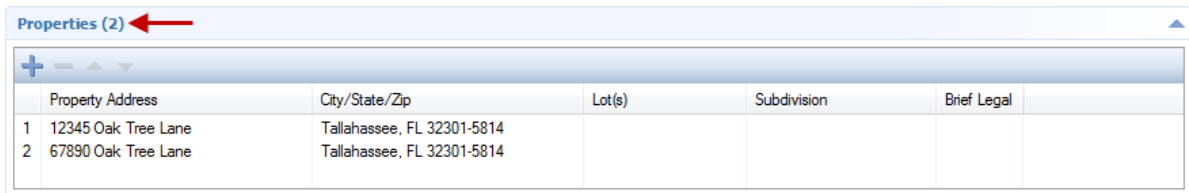
1. Click the **ProForm Program Tab**.




2. Select **General**, then **Property**.



3. Click **Properties** to show the Multiple Properties Grid.

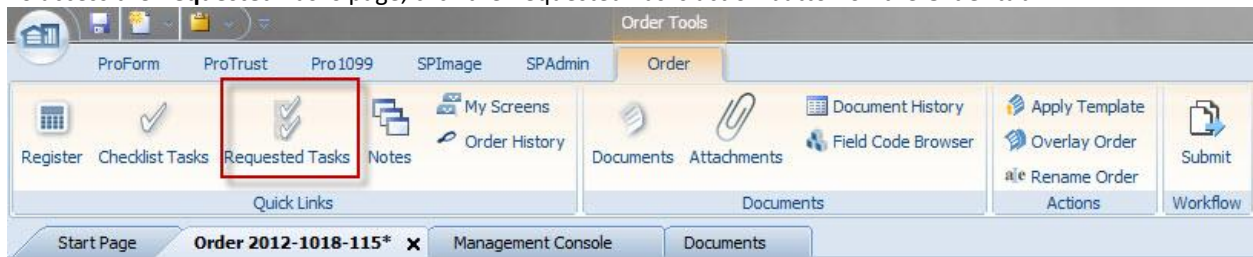






	Property Address	City/State/Zip	Lot(s)	Subdivision	Brief Legal
1	12345 Oak Tree Lane	Tallahassee, FL 32301-5814			
2	67890 Oak Tree Lane	Tallahassee, FL 32301-5814			

4. Select the property in the grid that you want to delete.
5. Click the **Delete Property** button .

Requested Tasks

To access the **Requested Tasks** page, click the Requested Tasks action button on the **Order** tab:



- Click  to add a task to the order. When data is entered into the fields below the requested tasks grid, the information automatically updates.
- To delete a task from the requested tasks grid, highlight the task to be deleted and click .
- **Note:** Right-click anywhere in the requested tasks grid to add or delete a task.
- The order in which the tasks are viewed can be adjusted by using the up/down buttons  on the toolbar.
- The tasks may be sorted alphabetically by task name by using the **sort button** .
 - If clicked, this button will sort BOTH the [Checklist](#) and Requested Tasks screens.
 - This button only affects the items present in the grid at the time that the button is pressed.
 - When tasks are manually ordered using the arrow buttons, they will stay in that order.
 - Adding a new task manually or via Workflow will put the new task at the bottom of the list. If the user wants to move those tasks, they'll have to click the sort button or up/down buttons again.

Occurs: Select **Pre-closing** or **Post-closing** to designate the time frame of the task in the closing process.

Task: Enter the description of the task in **Task** field. **Note:** Enter the most commonly used task descriptions into a template for future use.

Status: Select **Required**, **Requested**, **Received** or **N/A** from the drop-down list. When **Requested** is selected, the **Assignedto**, **Requested**, and **By** fields populate. When **Received** is selected the **Assigned to**, **Received**, and **By** fields populate. When **N/A** is selected the **Received**, and **By** fields populate. Status does not default to **N/A**, but you can select **N/A** any time. Tasks with status **N/A** do not appear as open tasks in your task list.



Assigned To: Enter the name of the individual to whom this task is assigned. The default is the current user name.

Requested

Due: Click the drop-down arrow to select the date this task should be requested by and enter a time.

Requested: Click the drop-down arrow to select the date this task is actually requested and enter a time.

By: Select the name of the person making the request from the drop-down list.

Details

Request via: Select one of the following options: **Phone, Fax, Mail, E-mail, Web, FedEx, UPS, Courier, In Person.**

Fee: Enter the fee for the item that is being requested. **Note:** The Fee field will only support numeric characters.

Line: Select the CDF/HUD-1 line.

Contact: Click the drop-down arrow to select an order contact from the list or add a new order contact to the list.

Received


Due: Click the drop-down arrow to select the date the item should be received by and enter a time.


Received: Click the drop-down arrow to select the date the item was received and enter a time.


By: Select the name of the person that received the item from the drop-down list.

Notes

Use the **Notes** are for miscellaneous comments concerning the task. By default, the **Notes** grid is hidden.

To add a note, click  OR right-click in the **Notes** field and select **Add Note**.

To delete a note, click  OR right-click in the **Notes** field and select **Delete Note**.

To search, click  OR right-click in the **Notes** field and select **Search**.

Working with Multiple Properties

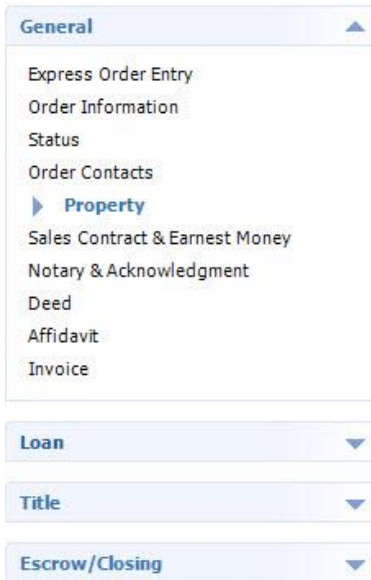
The Multiple Properties Grid on the **Property** screen in ProForm allows users to store information about more than one property per order. Use the Multiple Properties Grid to **add**, **delete**, or **view** properties in an order.

Accessing the Multiple Properties Grid

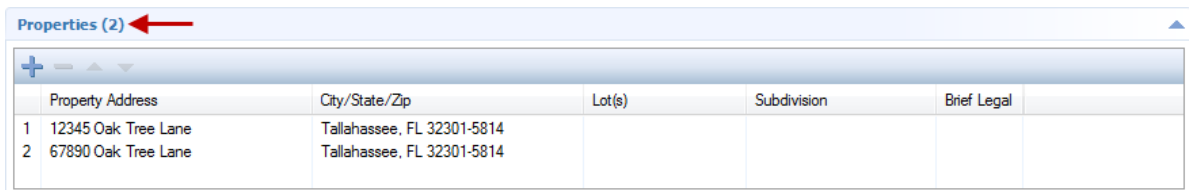
1. Click the **ProForm** Program Tab.



2. Select **Property**.



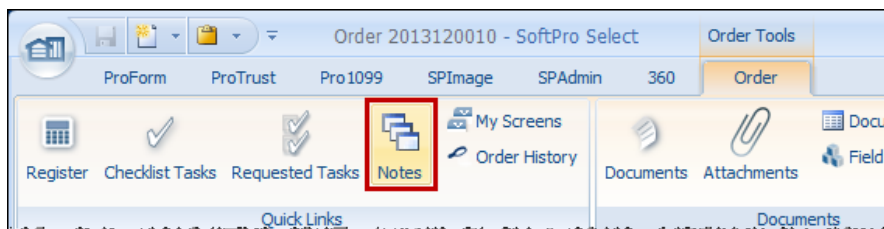
3. Click **Properties** to show the **Multiple Properties Grid**.



Order Notes

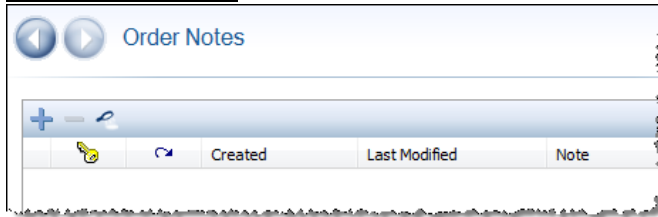
Several screens in SoftPro Select feature a **Notes** grid. Different users can save notes about an order or contact in Notes grids. Each Notes grid contains a title bar that displays the number of notes saved. Click the Notes bar to show or hide the notes grid. Any notes on these screens checked to "**Include in general order notes**" are combined into one main Order Notes grid. The Order Notes grid can store multiple notes about the order created by different users. Each row in the grid displays information about a note, including the user that created the note, the last modified date, and the note text. Double-click a note to expand it.






To access the Order Notes screen, go to the Express Order Entry Screen on the General screen section or click on the Quick Links menu on the [ProForm Action Ribbon](#) and click on the **Notes** button:




Navigating Order Notes

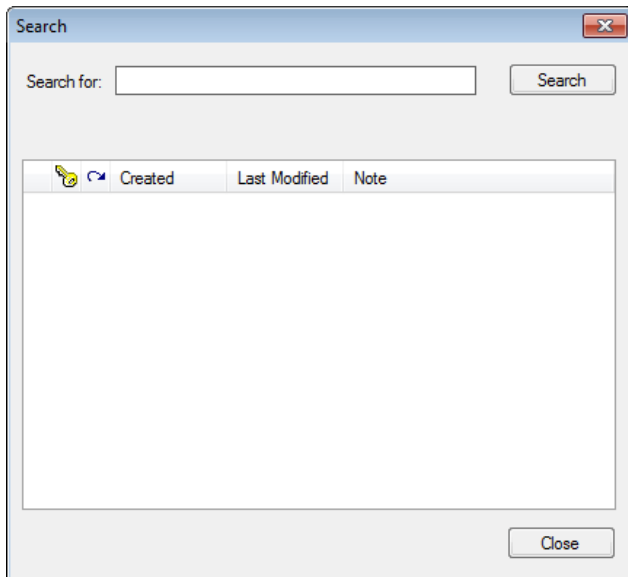
ORDER NOTES TOOLBAR



Icon or Heading	Function
	Adds a note
	Deletes a selected note
	Searches for a note
	Indicates an "internal" note
	"Include in general order notes" checkbox checked
Created	Indicates when note was entered
Last Modified	Indicates when note was edited
Note	Actual text of note

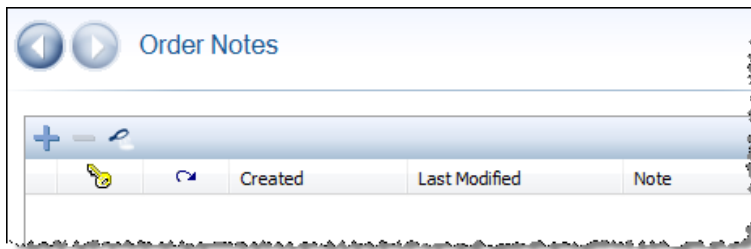
Searching for a Note

Search for a note by clicking the **Notes Search**  button or right-clicking and selecting **Find Note**. The **Search** dialog appears.



1. Enter the information in the **Search for** field.
2. Click **Search**.
3. Users can search through all notes. Sort notes by column, by clicking on the desired column header.
4. Click **Close** once the search is complete.

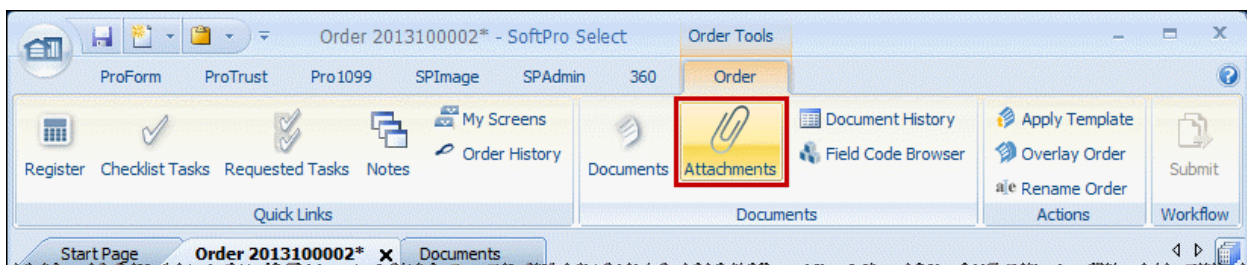
Order Notes Toolbar



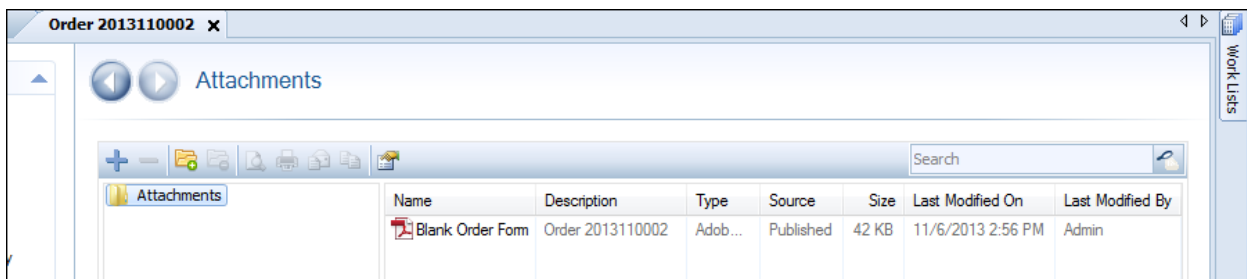
Icon or Heading	Function
	Adds a note
	Deletes a selected note
	Searches for a note (Notes Search button)
	Indicates an "internal" note
	"Include in general order notes" checkbox checked
Created	Indicates when note was entered
Last Modified	Indicates when note was edited
Note	Actual text of note

Attachments

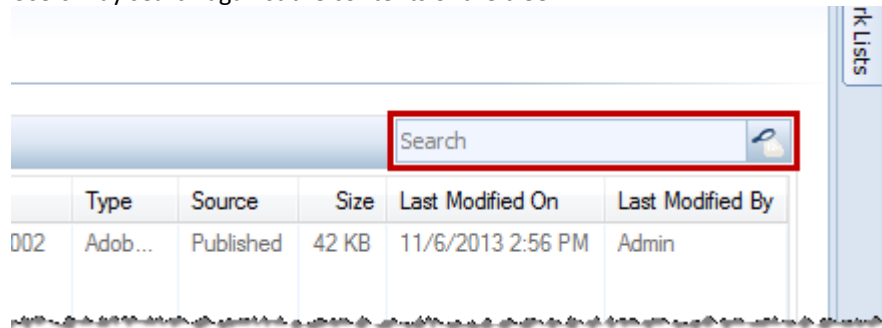
Attachments are contained on their own screen and can be accessed by clicking the **Attachments** button on the ProForm ribbon group under the **Order Tab** within the **Documents** group.



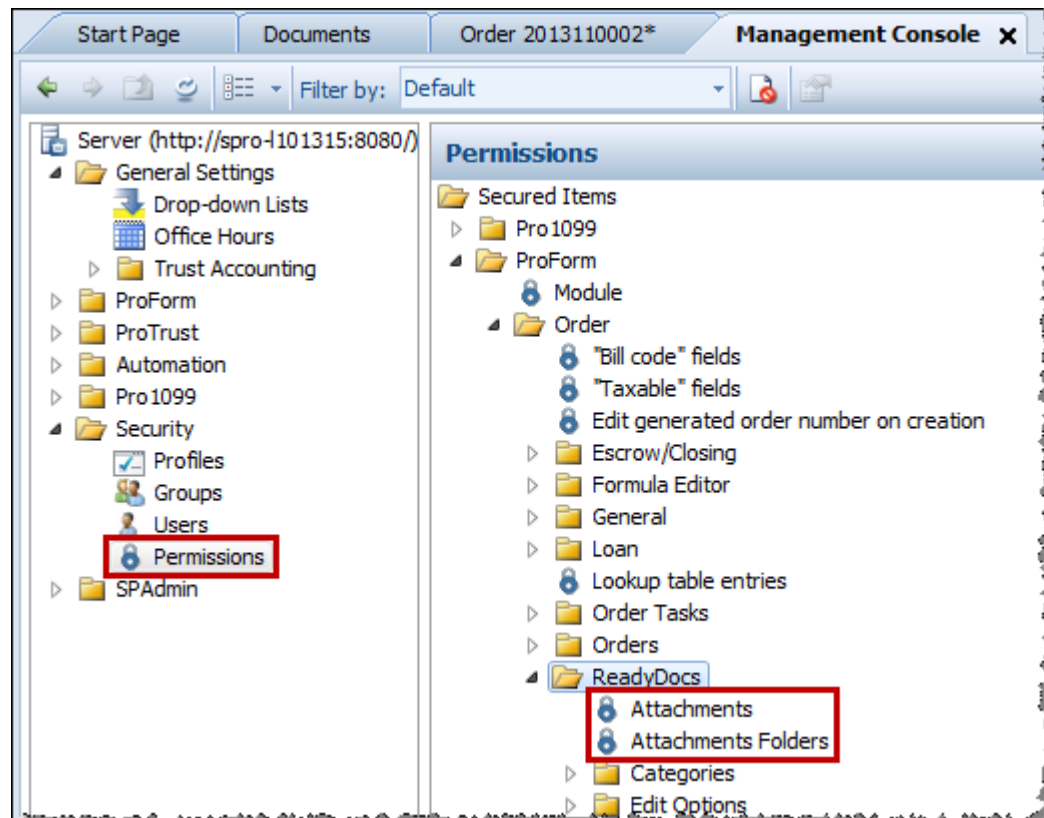
The attachments are organized in a directory tree format. The root folder of the tree is named **"Attachments"** and cannot be edited, deleted or moved. Users can create, rename, delete and nest folders under this main folder and subsequent subfolders.



Users may search against the contents of the tree:

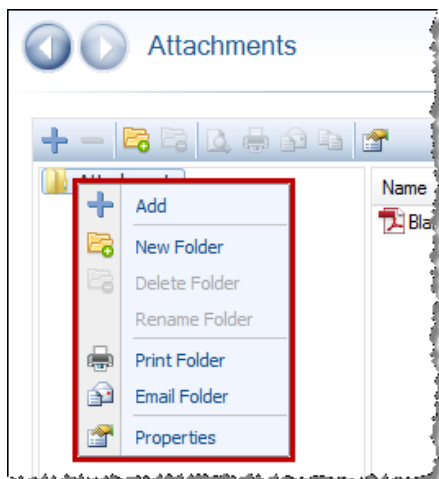


SPAdmin permissions determine the user's ability to view, add, edit or delete attachments, as well as to control the user's ability to add, edit or delete folders on the Attachments screen. These permissions can be viewed and modified by going into **SPAdmin > Security > Permissions**, and then navigating through the permissions **Secured Items > ProForm > Order > ReadyDocs**.



Context Menu

If afforded the appropriate permissions, the context menu and shortcut keys can be used to modify the attachments tree:



Add: Denoted by a (+), this feature allows users to browse and select one or more files to be placed in the selected folder.

New folder: Denoted by a folder icon with a green plus symbol, this feature may be used to add a folder to the attachments tree.

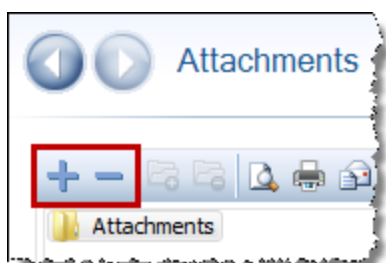
Delete folder: Denoted by a folder icon with a red minus (-) symbol, this feature may be used to delete a folder from the attachments tree.

Rename folder: Allows the user to rename a folder in the attachments tree.

Print Folder: *Immediately* prints the full contents of a folder while excluding subfolders. **NOTE:** No print dialog will appear to specify printer, number of pages, or other print options. The full contents are printed at once through the default printer set up on the user's system.

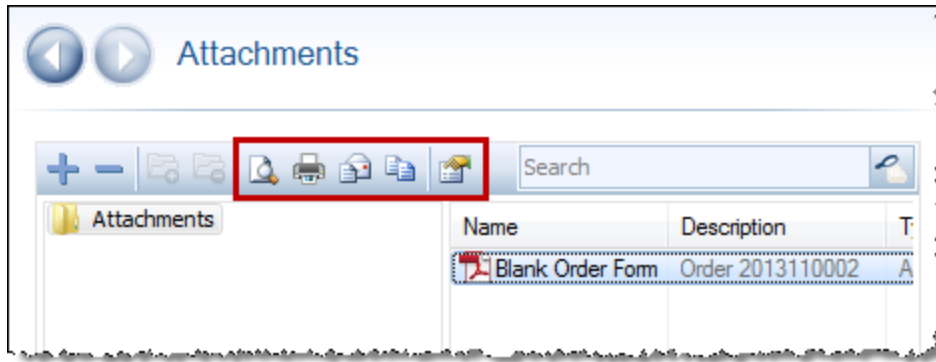
Email Folder: This option allows the user to send the contents of a folder, excluding subfolders, to any of the order contacts listed with email addresses. All attachment documents are attached to an email and the user can edit the body text of the email before sending. **NOTE:** Email attachments are limited to a total of 20 items at a time.

Properties: Allows the user to rename the folder.



Add Attachments: Denoted by a (+), this feature allows users to browse and select one or more files to be placed in the selected folder.

Delete: Denoted by a (-), this feature may be used to delete a selected subfolder or attachment. Pressing the Del key on the keyboard works in the same manner.



Preview: Allows users to preview any attachments selected in the attachments grid.

Print: Allows users to print any attachments selected in the attachments grid.

Email: Enables the user to send any attachments selected in the attachments grid with a new email message.

Pressing this button will launch the Email Recipients dialog, and will list any contact or person attached to a contact with an email address entered into the file. **NOTE:** Email attachments are limited to a total of 20 items at a time.

Copy: Creates a copy of a selected attachment.

Properties: Opens a dialog for renaming a file and/or changing the description.

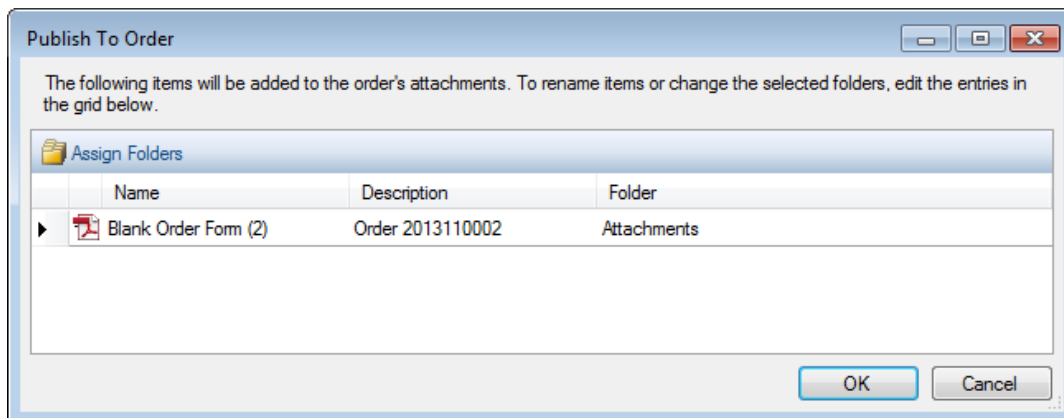
Adding Attachments

There are several different ways in which a user may add an attachment to an order using Select.

Publishing

[Publishing](#) may be done from the **Document Selection** screen, **Preview Screen**, or **Document Distribution** screen.

During the process of publishing, the **Publish to Order** dialog appears. This dialog allows users to edit the **Name** and **Description** of the published document or document set, as well as to select a **Folder** within the Attachments tree in which to house the published documents. All that is necessary to make these edits is to click directly on the row that contains the document. The default folder location is the root Attachments folder within the tree; if the user does not wish to move the published documents into folders other than the root Attachments folder, the user can click **OK**. The published document(s) will remain in the Attachments folder.



Drag/Drop

There are various ways in which a user may drag and drop an attachment into Select. In any of the drag and drop scenarios, if a user drops a document set with a non-unique naming convention, the order adds a "(1)" to the description to keep the naming convention unique. If a version "(1)" already exists, a "(2)" is added, and so forth.

ONTO AN ORDER

Attachments can be dragged and dropped into an order at any time. If dropped onto the order somewhere other than directly into the Attachment Folder Tree or into the Folder Content Pane, a "Choose Attachment Folder" dialog appears, similar to the Publish dialog, allowing users to designate in which Attachments folder the new attachment should be housed.

ONTO THE ATTACHMENT FOLDER TREE OR FOLDER CONTENT GRID

Attachments can be dragged and dropped directly into the Attachment Folder Tree or into the Folder Content Pane. Dropping onto a folder places the files into that selected folder; dropping onto a document places the files into the same folder as the selected document.

SPIImage

Documents scanned in or imported via the [SPIImage](#) dialog may be attached to an order.

Templates


When copying folders from a template or other order through the [Apply Template](#) process, the application only creates a new folder if a folder with the same name does not already exist in the file. Users may also attach documents and image files to a template on the attachments screen. These attachments will then be pulled over when the user applies this template to new orders or overlays the template onto existing orders.

Loan Charges (800)


Items Payable in Connection with Loan

HUD-1: Defaults to **1** for the first HUD. If multiple HUDs have been added to the order, this drop-down is used to switch between HUDs.

801 Line of the HUD (Our origination charge): Line 801 includes the sum of all charges issued by the loan originator, including but not limited to: loan origination, processing fees, broker fees and yield spread premiums. Enter the percentage of the loan amount in the % field. You can check the **Financed** option to indicate if this fee has been financed into the loan.



Charges can be itemized by using the additional charges button . The itemized charges will appear on the HUD-1 attachment.

802 Line of the HUD (Your credit or charge (points) for the specific interest rate chosen): The 802 section contains the loan discount information. It indicates the charge or credit adjustment as applied to line 801 if applicable. This amount is entered outside the columns in the **Re** field. Indirect payments from a lender to a mortgage broker must be included as a credit on line 802.

Charges can be itemized by using the additional charges button . The itemized charges will appear on the HUD-1 attachment.

All other 800 Lines: The descriptions for all 800 sections greater than 807 are editable. Lines are also editable if you have permission to edit RESPA reserved sections. Depending on permissions, it may also depend on order type. Default values are:

- **Line 803 - Your adjusted origination charges:** This indicates the net amount of the loan origination charges and the sum of the amounts shown in lines 801 and 802. The amount must be entered inside the borrower's column. If there are multiple payees, then disbursements for all 803 line items need to be broken up in the Payee grid.
- **Line 804 - Appraisal fee:** Lines 804-807 indicate each of the "required services that we select" (from the GFE). Each settlement service provider must be identified by name and the amount paid recorded either inside the columns or as paid to the provider outside of closing (POC).
- **Line 805 - Credit report:** records fees for all credit reports
- **Line 806 - Tax service to:** records fees for any tax service
- **Line 807 - Flood Certification:** records any flood certification fees.
- **Lines 808 and up:** These lines are used to record other third-party services required by the loan originator. They may also be used to record other required disclosures from the loan originator.

Adding and Deleting an 800 Line: The HUD section contains HUD sections 801 through 811. Additional sections can be added by clicking the  button. Beginning with section 812, sections can be deleted by highlighting the section to be deleted and clicking the  button.

Note: Data contained within a line is lost once the line is deleted. You can add the line and data again, but all previous data is lost. A HUD line cannot be deleted if there are additional HUD lines after that line. For example, HUD line 813 could not be deleted if lines 814 and 815 exist. You would have to delete lines 815 and 814 prior to deleting 813.

If the **Use 2009 RESPA regulations for HUD-1 & HUD-1A** is not checked, HUD lines appear as follows:

801 Line of the HUD: The 801 section contains the loan origination fee information.

802 Line of the HUD: The 802 section contains the loan discount information.

All other 800 Lines: The descriptions for all 800 sections greater than 807 are editable. Lines are also editable if you have permission to edit RESPA reserved sections. Depending on permissions, it may also depend on order type. Default values are:

- Line 803 - Appraisal Fee
- Line 804 - Credit Report
- Line 805 - Lender's Inspection Fee
- Line 806 - Mortgage Insurance Application Fee
- Line 807 - Assumption Fee

Good faith estimate type: Following are some examples of good faith estimate types. Select from one of the following:

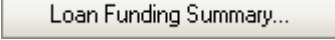
Cannot increase	Can increase up to 10%	Can change
<ul style="list-style-type: none"> • Lender origination charge • Your credit or charge (points) for the specific interest rate chosen (after borrower locks in interest rate) • Your adjusted origination charges (after borrower locks in interest rate) • Transfer taxes 	<ul style="list-style-type: none"> • Required services selected by lender • Title services and lender's title insurance (if selected by lender or borrower uses companies identified by lender) • Owner's title insurance (if borrower uses companies identified by lender) • Required services that you can shop for (if borrower uses companies identified by lender) • Government recording charges • Government recording charges 	<ul style="list-style-type: none"> • Required services that you can shop for (if borrower does not use companies identified by lender) • Title services and lender's title insurance (if borrower does not use companies identified by lender) • Owner's title insurance (if borrower does not use companies identified by lender) • Initial deposit for your escrow account • Daily interest charges • Homeowner's insurance

Good faith estimate amount: Enter the amount that appears on the good faith estimate for this charge.

Good faith estimate number: The GFE number is available only when the Use 2009 RESPA regulations for HUD-1 & HUD-1A option is checked. It corresponds to the GFE number on page 2 of the HUD. Default values are based on HUD-1 line numbers. Examples include:

- **3:** "Required services selected by lender"
- **6:** "Required services that you can shop for"
- **11:** "Homeowner's insurance"

Loan Funding Summary

To access this dialog: In ProForm, click  on the **Loan Information & Funding** screen. The **Loan Funding Summary** dialog displays a quick view of the deductions and credits from the lender and title company along with the funding amounts for each. This information will be calculated dynamically and is read-only.

Field	Description
Total of loan/draw amount	The amount of the loan or construction draw will be shown in the Total of loan/draw amount field.
Deductions (-)	All of the items within the order that are deducted from the loan funding check are summed and shown in the Deductions (-) field.
Credits (+)	All credits applied to the loan funding amount will be summed and placed in the Credits (+) field.
Loan funding amount	If the type of loan funding of the loan is Net, then the value in the Loan funding amount box will be calculated as:

	$\text{LoanFundingAmount} = \text{TotalOfLoan} + \text{Credits} - \text{Deductions}$ <p>Otherwise, the loan funding amount is set to the Total of loan/construction draw amount. If the loan contains a construction draw, then the construction draw amount will be used in the above formula as the TotalOfLoan variable.</p>
Amount received for loan funding:	
Overage/shortage:	
Total title company deductions (-)	All deductions within the order that are deducted from the title company's check will be totaled and placed in the Total title company deductions (-) field.
Total payoffs (-)	All payoffs from the title company will be totaled and placed in the Total payoffs (-) field.
Credits(+):	
Funding amount	<p>If the title company funding is Net, then the Funding amount will be calculated as:</p> $\text{FundingAmount} = \text{LoanFundingAmount} - \text{TotalTitleCompanyDeductions} - \text{TotalPayoffs}$ <p>Otherwise, the funding amount is set to the Loan funding amount value.</p>

Loan Information & Funding Overview

The **Loan Information & Funding** screen is located in the **Loan** section of the **SoftPro Screens** left navigation pane. It is divided into three main sections: **Loan Contacts**, **Loan Funding** and **Loan Information**.



The **Loan Contacts** section contains contact information pertaining to the loan such as **Lender** Displays the Lender screen. Enter the lender's information on this screen. Press F9 in the lookup code field to retrieve information already in the system, **Title Company** Displays the Title Company screen. Enter the title company's information on this screen. Press F9 in the Lookup code field to retrieve information already in the system , **Mortgage broker** Displays the Mortgage Broker screen. Enter the Mortgage broker's information on this screen. Press F9 in the Lookup code field to retrieve information already in the system, and **Loan Servicer** Displays the Loan Servicer screen. Enter the loan servicer's information on this screen. Press F9 in the Lookup code field to retrieve information already in the system.

The Loan Funding section contains financial information pertaining to the loan, such as the principal amount of the loan, the loan funding amount, and the loan funding type. The **Loan Funding Summary** button provides a quick and easy location to view the funding details of the loan.

The **Loan Information** section contains information pertaining to the loan such as loan type and loan number.

Loan Information & Funding

Loan Contacts

Field	Description
Lender	Enter the lender. Select one from the drop-down or add one to the list by selecting Add New.
Title company	Enter the title company.
Mortgage broker	Enter the mortgage broker payee. The name entered here will be used as the default payee name for all mortgage broker items on Page 2 of the HUD-1 settlement statement.
Loan servicer	Enter the loan servicer payee name. The name entered here will be used as the default payee name for all loan servicer items on Page 2 of the HUD-1 settlement statement.
Borrowers Grid	<p>The borrowers grid is used to designate which buyer/borrower contact is a borrower on the loan. This grid appears in both HUD-1 and CDF orders.</p> <p>WATCH VIDEO ▶</p> <ul style="list-style-type: none"> • Borrowers will be checked by default for all rows when Cash Sale is unchecked on the Express Order Entry screen. If Cash Sale is checked, borrowers will default to unchecked for all rows. • The grid is sorted by the associated Borrowers' contact Codes, and then by Name. • Organizational contacts appear in the list on separate rows. • Individual contacts appear in the list on separate rows and display the individual buyer's full name.

Loan Funding

Field	Description
CDF Field/HUD-1 Drop-down	<ul style="list-style-type: none"> CDF orders do not have a drop-down list, as each loan must be on its own CDF. HUD-1 orders do have a drop-down list that may be used to indicate which HUD document the loan is associated with.
Principal amount of loan	Enter the principal amount of the new loan. If there is a construction loan, enter the full amount of the construction loan. This is only editable with a HUD-1 order.
Line	Select the CDF or HUD-1 line number.
Construction/Equity first draw amount	<p>If there is a permanent or temporary construction loan, or an equity line closing, enter the amount of the first draw check sent to closing by the lender. Enter the amount in the Loan Proceeds/Funding Amount field as well.</p> <p>Note: The amount entered here appears on line 207 as a credit to the buyer. The description of the credit is construction draw.</p> <p>Hint: If there is a construction loan but no lender check is being brought to closing, enter \$0.00 in this field and in the Loan Proceeds/Funding Amount field.</p>
Line	Select the CDF or HUD-1 line number.
Description field	Enter the description to appear on the HUD-1 Settlement Statement for the selected HUD-1 line. The default description is " Construction draw ".
Remaining balance	ProForm automatically calculates the amount the buyer/borrower must bring to closing. If the check the buyer/borrower brings to closing is more than this amount, enter the actual amount of the buyer/borrower's check here. The excess will automatically be disbursed to the buyer/borrower. Note: The amount entered in this field will not be printed on the HUD-1 settlement statement.
Loan funding provided by	Select Lender or Mortgage Broker to describe who is funding the loan.
Loan funding amount	<p>An amount appears in this field automatically based on the loan funding type. The funding amount fills in automatically with the principal amount of loan. The funding amount will be calculated automatically. All loan charges deducted from the lender's check will be subtracted from the loan amount. If there is a construction loan or equity loan first draw amount, the first draw amount appears automatically as the funding amount.</p> <p>Note: There is one exception – if the draw amount is \$0.00, you must manually enter \$0.00 in the Loan Proceeds/Funding Amount field. If the funding type is net, the funding amount will equal the first draw minus any loan charges deducted from the lender's check.</p>
Loan funding type	<ul style="list-style-type: none"> Gross: Lender gross funds to the settlement agent (if the title company funding type is none) or title company (if the title company funding type is gross or net). Net: Lender net funds to the settlement agent (if the title company funding type is none) or title company (if the title company funding type is gross or net).
Title company funding amount	An amount appears in this field automatically based on the title company funding type. The title company funding amount automatically fills in with the loan funding amount. The title company funding amount will be calculated automatically.

	All title charges deducted from the title company check will be subtracted from the loan funding amount.
Title company funding type	<ul style="list-style-type: none"> • Gross: Title company gross funds to the settlement agent. The title company funding amount defaults to the loan proceeds/funding amount. • Net: Title company net funds to the settlement agent. The title company funding amount calculated by subtracting title charges deducted from title company check from the loan funding amount. • None: No title company involved in the loan funding transaction (or the settlement agent and title company are the same).

Loan Information

Field	Description
Loan type	Select the appropriate type to describe the new loan. Note: If the Use 2009 RESPA regulations for HUD-1 & HUD-1A is checked, then the FmHA option is replaced with the RHS option.
Other description	If Other is selected as the loan type, use this text field to enter a description.
Loan number	Enter the loan number. This appears in box 7 of page 1 of the HUD-1 settlement statement.
Mtg. Ins. case #	Enter the mortgage insurance case number. This appears in box 8 of page 1 of the HUD-1 settlement statement.
FHA old case #	Enter the old FHA loan number for FHA loans that require this information to be printed on the HUD-1 settlement statement.
Loan approval date	Enter the loan approval date.
Loan commitment expiration	Enter the expiration date of the loan approval.

Notes: Enter any notes if applicable.

Loan Terms & Payments

Loan: Click the drop-down and select the desired loan to be displayed. Click the link next to the drop-down to display the **Loan Information & Funding** screen.

Loan: (\$234,234.00)

Loan Terms

Option	Description
Annual interest rate	Enter the interest rate as provided by the lender in the loan instructions. This will be used by ProForm to calculate the principal and interest payment, and used in the calculation of interim interest, if any.
Arm Data button	Displays the Adjustable Rate Mortgage (ARM) Data dialog box. Enter all information pertaining to the ARM here.

Payment	Select one of the following payment intervals from the drop-down list:
Frequency	<ul style="list-style-type: none"> 12 Monthly 52 Weekly 26 Bi-weekly 24 Semi-monthly 4 Quarterly 2 Semi-annually 1 Annually <p>Note: This will be used by ProForm to calculate the principal and interest payment for the buyer/borrower.</p>
Plural	<p>The default is based on the Payments Frequency selected. For example, if monthly is selected from the Payments Frequency drop-down, months will display in this field.</p> <ul style="list-style-type: none"> 12: months 52: weeks 26: payments 24: payments 4: quarters 2: payments 1: years
Singular	<p>The default is based on the Payments Frequency selected. For example, if monthly is selected from the Payments Frequency drop-down, month will display in this field.</p> <ul style="list-style-type: none"> 12: month 52: week 26: payment 24: payment 4: quarter 2: payment 1: year
Loan term years	Defaults to 30; may be altered manually.
Total payments	Enter the term [the loan term is equal to the total number of payments over the life of the loan] of the loan.
Maximum loan checkbox	Check to specify a maximum loan balance.
Maximum loan balance	Enter the maximum amount of the loan.
Prepayment penalty checkbox	Check if there will be a prepayment penalty.
Maximum prepayment penalty amount	If you check the Prepayment penalty checkbox, then enter the maximum amount.

Balloon after Enter the number of months, years, or payments after which a balloon payment is to be made. For example, a five-year balloon payment should have **year(s)** and **5** input in the two fields here to reflect the balloon payment is due after 5 years payments.

New/Extended maturity date The date is calculated based on the amount entered in the Balloon after fields. For example, if you enter **years(s)** and **5** in the Balloon after fields, the date will default to a new date that reflects a final maturity date after five years.

Payments

Option	Description
First payment date	Select the due date of the first payment of the loan.
Final payment date	Select the due date of the final payment of the loan. If the loan has a balloon, the Final payment date will default to the same date as " New/Extended maturity date ".
Principal and interest	The payment amount in this field will be calculated automatically based on the annual interest rate, term, and loan amount. Be sure to verify that the amount that appears in this field is the same as the lender's figure.
First payment amount	Enter the amount of the first payment of the loan. Note: The default for this field is the amount entered in the Principal and interest field.
Final payment amount	Enter the amount of the final payment of the loan. Recalculates the final payment amount when there is a balloon.
Payment Information Letter button	Displays the Payment Information Letter dialog box .
Late charge after and Days at	If you intend to print a Borrower Payment Information Letter, Note, Federal Truth-in-Lending Disclosure Statement, or similar document, enter the number of days after which a late charge will be assessed. Enter the percentage of the late charge in the Days at field.
Late Fee	Enter the amount of the late fee. This is the penalty paid if the payment is not made within the required time.
Interest rate after default	If you intend to print a Borrower Payment Information Letter, Note, or similar document, enter the percentage of the rate after default here. Note: The default for this field is the Annual Interest Rate.

Interim Interest

Option	Description
Interim interest to be paid	Select one of the following from the drop-down: CDF Line/HUD-1 Line: Interim interest is to be paid at closing. For HUD orders, the date range, number of days of interim interest, and amount of per diem interim interest used in the calculation will show on line 901 (found on the 900 Items Required By Lender To Be Paid In Advance screen of the HUD-1 & Closing tab). First Payment: Interim interest is to be paid with the first payment. None: There is no interim interest to be calculated.
Line	Select the CDF/HUD-1 line where you want the interim interest to appear.
Per diem decimal	Select the number of decimal places (1-6) you want included in the calculated per diem

digits	interim interest.
Do not round per diem	Select this checkbox if you do NOT want the calculated per diem interim interest rounded.
Per diem based on	Select one of the following from the drop-down: 365, 366, 360 . The number selected will be the number of days per year on which the interim interest calculation should be based.
Use 30-day months	Select this option if you want to base the interim interest calculation on 30-day months regardless of the actual number of days in each month involved in the calculation.
Per diem from date of	Select one of the following from the drop-down: Settlement, Disbursement, Proration or Other . Select the date on which the calculation of interim interest is to be based. The date range and number of days of interim interest will be based on the date selected here.

Title Screens Overview

The **Title** screens provide the user with the ability to create preliminary opinions on title, commitments, final opinions on title, policies, title legal descriptions, calculate premiums and other ancillary title functions. When ProForm is launched, the **Title** section is visible in the left navigation pane.

- **Title Legal Description:** Used to enter the legal description printed on title insurance documents.
- **Preliminary Title Search & Opinion:** Used to enter data collected during the preliminary title search.
- **Existing Liens:** Used to enter existing liens on title against the property.
- **Title Insurance Premiums:** Used to calculate title insurance premiums, including any prior policy adjustments and any premium splits.
- **Commitment - Schedule A:** Used to enter data pertinent to schedule A of the title commitment.
- **Commitment - Schedules B1, B2:** Used to enter requirements and exceptions shown on schedules B1 and B2 of the title commitment.
- **Commitment - Schedule D (this screen only available for TX installations):** Used to enter data for Schedule D of the title commitment. Schedule D is required by TLTA.
- **Final Title Opinion:** Used to enter information for final opinion on titles.
- **Policy - Schedule A:** Used to enter data pertinent to Schedule A of the title policy.
- **Policy - Schedules B1, B2:** Used to enter exceptions and subordinate matters for Schedules B1 and B2 of the title policy.
- **Endorsements:** Indicates the endorsements included with commitments or title policies and to enter the data for those endorsements.
- **Additional Title Charges:** Used to add information about any additional charges included for titles.

Title Legal Description

Property: Displays the number of properties if there are more than one.

Preliminary Opinion/Commitment legal Lookup Code: Enter a code to retrieve a preliminary opinion/commitment legal from the lookup table.

Preliminary Opinion/Commitment legal: Enter a legal description. This information displays on preliminary title opinion or commitment documents.

Final Opinion/Policy legal Lookup Code: Enter a code to retrieve a final opinion/policy legal from the lookup table.

Final Opinion/Policy legal: Enter a legal description. This information displays on final title opinion and title policy documents.

Copy from Escrow Legal: Press to copy the escrow legal description from the Property window.

Print as attachment: Click the Print as attachment checkbox to have the legal description print as an attachment on standard ALTA documents.

See also: [Entering Title Legal Descriptions](#)

Preliminary Title Search & Opinion

Property: If there are more than one properties included, they are numbered.

Date/Time completed: Enter the date and time the search and opinion was finished.

Completed by: Select the name of the person who completed the report from the drop-down list.

Search report dated: Enter the search date.

Abstractor: Select the abstractor (or add a new one) from the list provided.

Type of Search: Enter the type of search. Click on the hyperlink to pull up the type of search grid and enter associated fees.

Search fee: Enter the fee.

Search period begin date/time: Enter the date on which the title search began.

Search period end date/time: Enter the date on which the title search ended.

Search period: If applicable, enter the search period as a range of years (for example, 2002-2005).

Record owner: This field will automatically fill in with the sellers names.

Prepared for: Select a code (lender, owner, mortgage broker or agent) and enter the name.

Real Property Taxes

Taxes paid through the year: Enter the year through which ad valorem taxes are paid. Include any year for which taxes are partially paid. For instance, if ad valorem taxes are completely paid through 2006, and partially paid for 2007, enter 2007.

Taxes due now and payable: Enter the amount and/or explanation concerning the amount of taxes now due and payable. This appears on the Preliminary Opinion exactly as entered here.

Taxes not yet due and payable: Enter the amount and/or explanation concerning the taxes or lien not yet due and payable. This appears on the Preliminary Opinion exactly as entered here.

Special levies or assessments: Enter the amount and/or explanation concerning special levies or assessments now due. This appears on the Preliminary Opinion exactly as entered here.

Unsatisfied mortgages or liens: Enter information about any unsatisfied mortgages or liens that title to the property will be subject to if not satisfied.

Judgments and liens: Enter information about any judgments or liens that title to the property will be subject to if not satisfied.

Recorded Plat

Recording information: Enter the date of the Recorded Plat, the time and date of recordation, its maturity date, place recorded (and re-recorded, if applicable), Trustee and any additional information

Setback lines: Mark areas on a property where no building may be erected - enter any information regarding setback lines on a recorded plat of the property here.

- **Front:** enter the front yard depth of the area in which the setback lines are active
- **Side:** enter the side yard depth of the area in which the setback lines are active
- **Side street:** enter the depth from the side street in which the setback lines are active
- **Rear:** enter the rear yard depth of the area in which the setback lines are active

Violation: enter any violations of the above-stated setback lines

Lot dimensions: lot dimensions indicating the square footage of the property

- **Street frontage:** measures the land between any erected building on the property and the street
- **Depth:** average length of the side property lines running perpendicular to the street

Easements/Other matters: enter any right of ways against the property or any other matters that may affect the owner's usage of that property

Restrictive Covenants

Recording information: Enter the date of the Restrictive Covenants, the time and date of recordation, its maturity date, place recorded (and re-recorded, if applicable), Trustee and any additional information

Setback lines: Mark areas on a property where no building may be erected - enter any information regarding setback lines as stated by the restrictive covenants of the property here.

- **Front:** enter the front yard depth of the area in which the setback lines are active as stated by the restrictive covenants
- **Side:** enter the side yard depth of the area in which the setback lines are active as stated by the restrictive covenants
- **Side street:** enter the depth from the side street in which the setback lines are active as stated by the restrictive covenants
- **Rear:** enter the rear yard depth of the area in which the setback lines are active as stated by the restrictive covenants

Violation: enter any violations of the above-stated setback lines

Lot dimensions: lot dimensions indicating the square footage of the property

- **Street frontage:** measures the land between any erected building on the property and the street
- **Depth:** average length of the side property lines running perpendicular to the street

Reversionary or forfeiture clause: enter any reversionary or forfeiture clause language found in the chain of title - if such a clause appears in the chain, title companies must except to or require a release of that item.

Easements/Other matters: enter any right of ways against the property or any other matters that may affect the owner's usage of that property

Access/Occupancy

Access to public right of way: Select **Yes** if there is access to a public right of way, select **No** if there is no access.

Public right of way: Enter the name of the public right of way.

Easement: Select **Direct** or **Private** to describe the easement.

Property occupied by: By default, **Owner** is selected as the property occupant. Select **Tenant**, **Unimproved**, or **Unknown** if the owner is not the occupant.

Survey

Survey and inspection report attached: Check this checkbox to indicate that a survey and inspection report will be attached to the Preliminary Title Report.

Survey affidavit: Check this checkbox to indicate that a survey affidavit is being used in lieu of a full survey for the closing.

Prior survey used: Check this checkbox to indicate that a prior survey is being used for the closing.

Property Derivation

Type of instrument: Select the official name or title of the document conveying ownership (for example, mortgage, deed of trust, security deed).

Grantor: The full name of the Grantor in the scrollable field.

Grantee: The full name of the Grantee in the scrollable field.

Consideration amount: Enter the sum to appear as the consideration amount.

Additional information: Enter any additional information.

Recording information: Enter the date of the Property Derivation, the time and date of recordation, its maturity date, place recorded (and re-recorded, if applicable), Trustee and any additional information

Estate Matters

DECEDENT INFORMATION

Name: Enter the name of the decedent.

SSN: Enter the social Security number of the decedent.

DATE AND PLACE OF BIRTH

Date of Birth: Enter the date of birth.

City: Enter the city in which the decedent was born.

Civil divison/State: Enter the township/county/village label for the location of the decedent's birth.

of: Enter the township/county/village label location of the decedent's birth.

State:Enter the state for the location of the decedent's birth.

DATE AND PLACE OF DEATH

Date of death: enter the date the decedent died

City: Enter the city in which the decedent died.

Civil divison/State: Enter the township/county/village label for the location of the decedent's death.

of: Enter the township/county/village label location of the decedent's death.

State:Enter the state for the location of the decedent's death.

Address prior to death: Enter the decedent's street address prior to death.

City/State/Zip: Enter the city, state and zip of the decedent's address prior to death.

Foreign: Check this box if the address is a foreign address.

SPOUSE INFORMATION

Name: Enter the name of the decedent's spouse.

Address: Enter the street address of the decedent's spouse.

City/State/Zip: Enter the city, state and zip of the decedent's spouse's address.

Foreign: Check this box if the address is a foreign address.

Date of marriage: enter the date of the decedent's marriage to the spouse listed

EXECUTOR/ADMINISTRATOR

Name: Enter the name of the executor/administrator of the estate

Title: Enter the title of the executor/administrator of the estate

Relationship to decedent: Enter the relationship of the executor/administrator of the estate to the decedent

Address: Enter the street address of the executor/administrator of the estate.

City/State/Zip: Enter the city, state and zip of the executor/administrator of the estate's address.

Foreign: Check this box if the address is a foreign address.

Heirs

PROBATE

Date estate/inheritance taxes paid: Enter the date that estate taxes were paid.

Date estate/probate closed: Enter the date the estate/probate was closed.

Estate/file number: Enter the estate file number.

Court of probate: Enter the name of the court where the probate will be handled.

Will filed in: Enter the county and state in which the will is filed.

Recording information: Enter the date of the Will, the time and date of recordation, its maturity date, place recorded (and re-recorded, if applicable), Trustee and any additional information

Existing Liens

Existing Liens Grid

Priority: Displays the liens in order subordinating priority.

Borrower/Mortgagor: Fills from the **Given by** field under Mortgagor/Mortgagee information

Lender/Mortgagee: Fills in from the **In favor of** field under Mortgagor/Mortgagee information

Document Type: The Document Type column fills from the **Instrument Type** drop-down field - Mortgage, Deed of Trust and Security Deed are default entries on the list but other types can be added via the Drop-down List Manager in SpAdmin

Existing Loan #: Fills from the Existing Loan number field under the **Note Information** section

Instrument type: Select the official name or title of the document conveying ownership (e.g., Mortgage, Deed of Trust, Security Deed). If you have permission in SPAdmin, additional instrument types can be added via the Drop-down List Manager.

MERS registration #: Enter the Mortgage Electronic Registration System (MERS) number for this document. MERS numbers are 18 numbers long and should be entered in the following format: 1234567-1234567890-1. Include the hyphens when entering the MERS number.

Mortgagor/Mortgagee Information

Given by (Borrower/Mortgagor): The name of the buyer/borrower as entered on the buyer/borrower order contact entry appears here.

In favor of (Lender/Mortgagor): Enter the name of the lender of the original loan.

Lienholder address: Enter the street address or P.O. box of the lienholder.

City/State/Zip: Enter the city, state, and ZIP in the lienholder's address.

Foreign: Check to use an address format other than a standard United States address format (e.g. an address in Mexico). Checking this box changes the **City, State** and **ZIP code** fields to one text box to enter the information.

Foreign address (text box): Enter the foreign address. For example, if the address is:

Sra. Otilia Ramos Perez
Urión 30
Col. Atlatico
77520 CANCUN, Q. ROO
MEXICO

Check the **Foreign** checkbox and enter the address as follows:

Address:

 Foreign

See [Spanish Characters](#) for more information.

Note Information

Note date: Enter the date of the note for the security instrument.

Assumption and Modification: The [Assumption and Modification](#) dialog enables you to specify information pertaining to an assumed and/or modified lien from within the Existing Liens screen.

Existing loan number: Enter the existing loan number.

Lien must be satisfied/released: Select if this lien must be satisfied or released.

Original principal amount: Enter the original amount of the loan.

Unpaid principal balance: Enter the balance of the original loan at the time of consolidation, modification, or assumption. **Note:** If the document type is **assumption, modification, or assumption and modification**, this field will default to the **HUD-1 Line 203 amount**.

Maximum indebtedness/New mtg.: Enter the maximum allowable indebtedness for the new mortgage.

Consideration amount: Enter the value of the consideration.

Signing official name: Enter the name of the signatory.

Signing official title: Enter the official title of the signatory.

Signature line: Enter the name or text you want to appear under the signature line.

Registry Information

Registry name: Enter the name of the registry office where the document is recorded.

City/County/Township name: Enter the city, county, or township name in which the office resides in the City/County/Township Name field.

State: Enter the state in which the office resides in the State field.

Recording Information

Dated: Enter the date of the instrument.

Date/Time recorded: Enter the date the information was recorded.

Maturity date: Enter the date on which the principal amount of the loan or other debt instrument becomes due and is repaid to the investor and interest payments cease.

Recorded at/in: Enter where information was recorded, such as book or instrument number. Format for these fields are "label", "number", "label", "number", "label", "number" (see example).

Place recorded: This field will fill in with the information entered into the six **Recorded At/In** fields. Each set of two **Recorded At/In** fields will be separated by a comma. The default entry can be edited. For instance, suppose the following information appeared in the six **Recorded At/In** fields Book 1 Page 1 Document Number 1. The following would appear by default in the Place Recorded field: Book 1, Page 1, Document Number 1.

Place re-recorded: Enter re-recording data or any additional information about the recording of this document.

Trustee: Enter the name of the trustee. This can be a company or individual and is for the existing lien only. The Trustee is named to hold title to the property during the life of the mortgage. When the debt is paid off, the Trustee gives the title to the borrower and the lender relinquishes any claim to the property.

Additional information: Enter any relevant information about the existing lien only.

Assignments

Copy from previous assignment: Check box to copy lender information from the previous assignment.

Assignor/Assignee name: Enter the name of the assignor or assignee.

Assignor/Assignee full legal name: Enter the full legal name of the assignor or assignee.

Address: Enter the street address or P.O. Box.

City/State/ZIP: Enter the city, state, and zip code.

Foreign: Check to use an address format other than a standard United States address format (e.g. an address in Mexico). Checking this box changes the City, State and ZIP code fields to one text box to enter the information.

Foreign address (text box): Enter the foreign address. For example, if the address is:

Sra. Otilia Ramos Perez
Urión 30
Col. Atlatilco
77520 CANCUN, Q. ROO
MEXICO

Check the **Foreign** checkbox and enter the address as follows:

Address:

 Foreign

See [Spanish Characters](#) for more information.

Organized under the laws of: Select a state from the drop-down list for which the laws affect the assignor or assignee. This information is to be printed on Mortgage and Deed of Trust documents, and the defaulted entry can be changed. Refer to your lender instructions for help if the entry that appears by default is not satisfactory.

Assignee full legal name: Enter the full legal name of the assignee.

Address: Enter the assignee's address.

City/State/Zip: Enter the city, state and zip.

Consideration amount: Enter the sum to appear on the assignment of mortgage as the consideration amount.

Interest from: Enter the date when the interest will be included in the mortgage assignment. This date appears on the assignment of mortgage.

Assignment Recording Information

Dated: Enter the date of the assignment.

Date/time recorded: Enter the date or time this assignment was recorded.

Recorded at/in: Enter where the assignment was recorded.

Place recorded/re-recorded: Enter where the assignment was recorded or re-recorded.

Title Insurance Premiums

Title Insurance Premium Selection

Select rate information in the Title Premium Selection section. This section derives information from the associated Lookup Table for policies. Lookup Table entries for this screen can only be created from the **Rate Table – Discount**, **Rate Table – Premiums**, and **Policy Managers** found within SPAdmin.

The Title Insurance Premium Section works in two modes. If you have created entries in the Policy Lookup Table, the screen functions in “**Lookup Mode**.” If there are no entries in the Policy Lookup Table the screen functions in “**User Entered Mode**.” These modes should function as follows:

1. **Lookup Mode:** The drop-down fields on the screen display only entries from the lookup table. any values that you want to use on the screen must be entered in the Title insurance Premium Manager. The Zone/Area drop-down should not allow users to add a zone when they are in lookup mode.
2. **User Entered Mode:** Field displays as follows: State will show all states, Zone/Area will be empty, Underwriter will point to order contacts, Policy/Guarantee type would show entries from the Policy Guarantee Type table and the Lookup code is empty. When an additional loan is added to an order, a new entry with a policy type "**Loan**" is automatically crated for the new loan on the Title Insurance Premiums screen.

When an additional loan is added to an order, a new entry with a policy type, “**Loan**” is automatically created for the new loan on the Title Insurance Premiums screen.

State: Select a state for the premiums from the drop-down list. This is based on the state(s) that policies were created for.

Zone/Area: Select a zone or area from the drop-down list, if applicable (See **SPAdmin**, then **Tools**, then **Drop-down Lists** for additional information).

Underwriter: Select an underwriter from the drop-down list. This is based on the underwriter(s) that policies were created for.

Policy type: Select a type for the new policy from the list provided. Select from the following: **Simultaneous**, **Owners** or **Loan**.

Policy code: Select a policy code from the available list. (This is activated provided that the underwriter is selected, the policies are created in SPAdmin, and the policy type is selected above.) While in the Lookup mode, this field will filter in the applicable coverage amounts and activate the premium calculations.

Loan: Select the loan from the drop-down list. This is especially important when dealing with multiple loans.

Commitment: You can add a new commitment or associate a commitment with a policy so the policies automatically flow forward to the appropriate commitment. The commitment defaults to "1".

Description: When in Lookup mode, this field is automatically populated with information from the Policy Manager - which is where the policy codes are created for lookup mode. If you are in user-entered mode, though, the Description field is enabled, and you would manually enter information.

Underwriter case number: Enter the underwriter's case number used to reference this file.

SIMULTANEOUS ISSUE

This section only shows with a Simultaneous Issue policy. It appears directly beneath the Underwriter case number field and contains four checkboxes.

Show both policy numbers on both policies: Select to show both policy numbers on both policies.

Show full premium on CDF/HUD-1: This box is checked by default with a CDF order and unchecked by default with a HUD-1 order. When checked:

- The premium will be sent to the **CDF** or **HUD-1** line. **Note:** for CDF orders, it is strongly recommended that title premiums be managed via the [dropdown lists](#) on the **Options** screen underneath the **Title – CDF section defaults**.
- New fields will show in the Owner's Policy Premium and Split & Loan Policy Premium and Split sections.
- The two checkboxes **Show full loan premium on Settlement Statement/Invoice** are activated.

Show full premium on Settlement Statement: This checkbox is activated when Show full premium on CDF/HUD-1 is checked. When unchecked, the traditional premium calculations will appear on the Settlement Statement; when checked, the new premium amounts will appear on the Settlement Statement.

Show full premium on invoice: This checkbox is activated when Show full premium on CDF/HUD-1 is checked. When unchecked, the traditional premium calculations will appear on the invoice; when checked, the new premium amounts will appear on the invoice.

Owner's Policy and Loan Policy

Policy number: Enter a policy number.

Coverage amount: Enter the face amount of the policy. The default for this field is the amount selected in the **Basis Code** field.

Prior policy adjustment: If prior policy adjustment is required, the adjustment will appear here. Click on the hyperlink to access the [Prior Policies screen](#).

Seller pay %: The percentage of the final premium that the seller pays at closing.

Seller pay amount: The dollar amount of the Final premium that the seller pays at closing. Enter either the Seller pay percentage and have the amount calculated OR enter the dollar amount, and the percentage will be calculated.

Final owner's/loan premium: The Final Premium field should be calculated as follows:

1. Fill in premium coverage amount with the value specified in the **Basis** drop-down.

2. Run the premium coverage amount through the rate table. Put that value in the **base premium** field.
3. Add the prior policy adjustment (if any) to the adjusted premium. This is the final owner's premium.
4. Add the simultaneous issue fee (if any) to the adjusted base premium.
5. Multiply the value from step 4 by the **multiplication percent** field.
6. Add the value in the adjustment amount field to the value from step 5. Put this value in the **final premium** field.

SI net owner's premium: The SI net owner's premium is available when **Show full premium on CDF/HUD-1** is checked in a simultaneous issue. It is calculated with the following federally-regulated calculation: **Final owner's premium + Final loan premium – Full loan premium = SI net owner's premium.**

- **SI net owner's premium hyperlink:** This item opens a dialog showing the SI net owner's premium calculation.

Full loan premium: The Full loan premium is available when **Show full premium on CDF/HUD-1** is checked in a simultaneous issue. It is calculated using Full loan premium rate table and is used with the following federally-regulated calculation: **Final owner's premium + Final loan premium – Full loan premium = SI net owner's premium.**

- **Full Loan premium hyperlink:** This item opens a dialog showing the SI net owner's premium calculation.

Transaction code: Enter any transaction code required by your state or title insurance underwriter. This code will be shown on the policy register report.

Remarks: Enter any additional comments or remarks about the policy. These remarks will be shown on the policy register report.

Owner's and Loan Policy Premium and Split

Basis: Select a basis code from the list provided. Your selection will determine the amount that fills in the Coverage Amount field. The coverage amount will be used to calculate the other policy premium.

There are five basis codes available:

1. **Loan Amount:** Fills in with the loan amount.
2. **Sales Price:** Fills in with the sales price.
3. **Higher of Loan Amount or Sales Price:** Fills in with loan amount or sales price, depending on which is higher.
4. **125% of Loan:** Fills in with the percentage of the loan (125%).
5. **Loan Amount in Excess:** Fills in with the multiplication % for amount not exceeding owner's policy.
 - You will be able to establish this basis code and a **Multiplication % for loan amount that does not exceed the owner's policy** in the Policy Manager. You can also modify this new multiplication % field on the Premiums screen when you select the basis code **Loan Amount in Excess** via the **Additional Calculations** dialog, located next to the final loan premium. This meets the requirement for New York simultaneous issues, but allows modifications for use in other states as needed.

- **Note:** The **Loan Amount in Excess** option pertains to the following simultaneous issue regulation: "When an owner's policy and a loan policy are issued simultaneously covering identical property, the rate for the owner's policy shall be the applicable owner's rate. The rate on the amount of the loan policy that does not exceed the amount of the owner's policy shall be calculated at thirty percent (30%) of the loan rate. The rate on the amount of the loan policy in excess of the amount of the owner's policy shall be calculated at the full loan rate."

Coverage amount: Enter the face amount of the policy. The default for this field is the amount selected in the **Basis Code** field.

Method: Default is the standard method of calculating the premium based on the rate table selected, however, if the premium needs to be calculated differently (in a special way), the method can be selected.

- **Default:** Calculates based on the loan amount or sales price as selected.
- **Loan Higher:** Calculate the loan premium as regular using the appropriate level in the rate table. Use the difference between the loan coverage and the owner's coverage and calculate the premium at the same level as the full coverage amount. Take the difference between the full loan premium and the loan premium for the difference - this is the premium amount for the loan policy.
- **TX-Sim:** Will calculate like loan higher and will also enable a calculation for the endorsements based on the rate set in the loan amount.

Invoice: Select the applicable invoice line for the premium to appear. A valid invoice number may automatically display if established in the Policy Manager.

Rate table: Select the rate table from the drop-down list. The selections are rates created in SPAdmin.

Bill code: Select the applicable bill code. This is for revenue reports..

Base premium: Enter the base premium amount for the policy. An amount appears here automatically if a basis code and rate table are entered. You can adjust the base premium amount using the **Mult%** and **+/-Amount** fields. Enter the percentage of the base premium to be included in the total net premium in the **Mult%** field (The default for this field is 100.00). To add a straight dollar amount to the base premium, type the amount in the **Adjustment +/-** field. To subtract an amount, type a minus sign (-) before it. The total net premium amount appears to the right of the equals sign (=) in the **Premium** field.

Prior policy adjustment: If prior policy adjustment is required, the adjustment will appear here.

Multiplication %: You can adjust the base premium amount using a percentage. Enter the percentage of the base premium amount to be included in the calculation of the total net premium amount. **Note:** The default for this field is **100.00**. The total net premium appears in the **Premium** field after the equal sign (=).

Simultaneous issue fee: If applicable, enter the simultaneous fee. When using the Lookup mode, this will be filled in based on the policy set up within the Policy Manager in SPAdmin.

Adjustment: You can adjust the base premium amount by adding or subtracting a dollar amount. To add a straight dollar amount to the base premium, enter the amount here. To subtract, type a minus sign (-) before the amount. The total net premium appears in the **Premium** field after the equals sign (=).

Final owner's/loan premium: Based on all previously selected criteria, the final premium appears here.

SI net owner's premium: The SI net owner's premium is available when **Show full premium on CDF/HUD-1** is checked in a simultaneous issue. It is calculated with the following federally-regulated calculation: **Final owner's premium + Final loan premium – Full loan premium = SI net owner's premium.**

- **SI net owner's premium hyperlink:** This item opens a dialog showing the SI net owner's premium calculation.

Full loan premium: The Full loan premium is available when **Show full premium on CDF/HUD-1** is checked in a simultaneous issue. It is calculated using Full loan premium rate table and is used with the following federally-regulated calculation: **Final owner's premium + Final loan premium – Full loan premium = SI net owner's premium.**

- **Full Loan premium hyperlink:** This item opens a dialog showing the SI net owner's premium calculation.

Full loan premium rate table: select a table from this drop-down menu to be used in the full loan premium calculation.

Line: You may select a **CDF** or **HUD-1** line from the drop-down.

- **Note:** for CDF orders, it is strongly recommended that title premiums be managed via the [dropdown lists](#) on the **Options** screen underneath the **Title – CDF section defaults.**
- For best practices on how to populate this CDF line, view the [CDF line drop-down help](#) for title screens.
- **Line Description:** This field accommodates CDF requirements, which specify that the "Title –" prefix be added to **all title-related charges.** The suffix "**(optional)**" is required to be added to the **Owner's Title Insurance Premium** description when the borrower is paying all or a portion of the policy. These prefixes (and suffixes) are added automatically to the existing descriptions that show on screen, and may be edited manually. The two exceptions to this requirement are the Lender's Policy and Owner's Policy, which have descriptions that are generated by the application.

Seller credit to borrower: a field and Line drop-down are included for when the seller pays all or a portion of the owner's policy and the difference between the amount that needs to be paid with the traditional calculations and the amount paid with the new calculations are credited to the borrower. If the premium is taxable, this is also taken into account in determining the credit to the borrower.

- **Line drop-down:** A CDF or HUD-1 line may be manually selected here.
- **Note:** for CDF orders, it is strongly recommended that the seller credit to borrower line be set via the [Policy Manager](#) in SPAdmin.
- For best practices on how to populate this CDF line, view the [CDF line drop-down help](#) for title screens.

Taxable: Check this option to indicate if the charge is taxable. **Note:** This option is visible only when the **Sales Tax** option in **SPAdmin, Preferences, ProForm Order Options** is checked.

Additional Calculations: Fills in with the multiplication % for amount not exceeding owner's policy.

Guaranty Fee

The Guaranty Fee is available when the Commitment Schedule D preference is checked in the order's owning profile. Information regarding the fee can be added in the Policy Manager for each policy premium type.

Edit Guaranty Fee: Clicking the hyperlink on the Title Insurance Premiums screen will pull up the **Edit Guaranty Fee** dialog. This dialog allows for modifying several fields and lists associated with the Guaranty fee.

- **Note:** If the Guaranty Fee has been moved to the Commitment D screen, then the **Edit Guaranty Fee** options discussed below will only include Description and Amount.

Description: Defaults to Guaranty fee; description for the fee to be used on the CDF/HUD-1 line may be changed manually. Allows 100 characters.

Amount: Enter the amount of the fee.

Bill code: Select the applicable bill code. This is for revenue reports.

Line: Enter the CDF/HUD-1 Line. The total of both owner's and loan policy guaranty fees will default in the RE field on the CDF/HUD-1 line selected for the loan policy guaranty fee. The amount in the RE field will print as the "outside of column amount" on the HUD-1 Settlement Statement (2009 HUD-1 only).

- **Line Description:** Defaults to **Title - Guaranty fee** for CDF orders and **Guaranty Fee** for HUD-1 Orders; it may be changed manually. This field accommodates CDF requirements, which specify that the "Title –" prefix be added to **all title-related charges**. This prefix is added automatically to the existing descriptions that show on screen. The two exceptions to this requirement are the Lender's Policy and Owner's Policy, which have descriptions that are generated by the application.
- For best practices on how to populate this CDF line, view the [CDF line drop-down help](#) for title screens.

Disclosure: This checkbox is only visible if the **Use 2009 RESPA** option is checked. If this field is checked, the borrower amount appears in the Disclosure amount field for the selected HUD-1 line. If this field is unchecked, the borrower amount appears in the Borrower amount field for the selected HUD-1 line. If an amount is sent to a HUD-1 line and there is a Seller Pay%, only the borrower's portion will be sent to the Disclosure amount if this checkbox is checked.

Payee: The party indicated in this field will receive a disbursement and will show on the previously associated HUD-1 Line. Any code can be used for the Guaranty Fee. (2009 HUD-1 only)

Note: In a HUD-1 order, if the owner's or loan policy premium is split between an agent, underwriter, and a 3rd party, you can disclose the 3rd party's portion of the split on a blank line in the 1100 series (1109 or higher) by selecting the HUD-1 line in the "Disclose portion of premium on line" drop-down located on the **Attorney, Escrow Company, Settlement Agent, Title Company** and **Underwriter** contact screens.

For more information on TDI, see: <http://www.tdi.texas.gov/>

Recoupment Fee

The Recoupment Fee is available when the Recoupment Fee preference is checked in the order's owning profile. Information regarding the fee can be added in the Policy Manager for each policy premium type.

Edit Recoupment Fee: Clicking the hyperlink on the Title Insurance Premiums screen will pull up the Edit Recoupment Fee dialog. This dialog allows for modifying several fields and lists associated with the Recoupment fee:

Description: Defaults to Recoupment fee; description for the fee to be used on the CDF/HUD-1 line may be changed manually. Allows 100 characters.

Amount: Enter the amount of the fee.

Bill code: Select the applicable bill code. This is for revenue reports.

Line: Enter the CDF/HUD-1 Line (2009 HUD-1 only).

- **Line Description:** This field only appears on CDF orders; it defaults to **Title - Recoupment fee** and may be changed manually. This field accommodates CDF requirements, which specify that the "**Title -**" prefix be added to **all title-related charges**. This prefix is added automatically to the existing descriptions that show on screen. The two exceptions to this requirement are the Lender's Policy and Owner's Policy, which have descriptions that are generated by the application.
- For best practices on how to populate this CDF line, view the [CDF line drop-down help](#) for title screens.

Disclosure: This checkbox is only visible if the **Use 2009 RESPA** option is checked. If this field is checked, the borrower amount appears in the Disclosure amount field for the selected HUD-1 line. If this field is unchecked, the borrower amount appears in the Borrower amount field for the selected HUD-1 line. If an amount is sent to a HUD-1 line and there is a Seller Pay%, only the borrower's portion will be sent to the Disclosure amount if this checkbox is checked.

Payee: The party indicated in this field will receive a disbursement and will show on the previously associated HUD-1 Line. Any code can be used for the Recoupment fee. (2009 HUD-1 only)

Note: In a HUD-1 order, if the owner's or loan policy premium is split between an agent, underwriter, and a 3rd party, you can disclose the 3rd party's portion of the split on a blank line in the 1100 series (1109 or higher) by selecting the HUD-1 line in the "Disclose portion of premium on line" drop-down located on the **Attorney, Escrow Company, Settlement Agent, Title Company** and **Underwriter** contact screens.

For more information on TDI, see: <http://www.tdi.texas.gov/>

Split

Although splits are not shown on the CDF as they are on the HUD-1, split amounts on a CDF order will continue to be sent to the Payee grids for disbursement for premiums, endorsements, and additional title charges.

Based on: This is how the split will be calculated. You can choose between **Split Rate Table** and select the applicable rate or **Premium Calculation** and select the applicable premium that the split should be calculated off of.

Premium to split: Enter the base premium amount for the split.

Prior policy adjustment: Prior policy adjustments if necessary before the final split premium is determined.

Final premium to split: Indicates the net amount of premium to split. May be split up to five ways.

SI net premium to split: Indicates the amount of the SI net premium to split. May be split up to five ways.

Full premium to split: Indicates the amount of the Full premium to split. May be split up to five ways.

Split to hotspot: Click to open the [Default Splits dialog](#) and view or edit multiple splits. **Note:** Data entered on the Default Splits dialog displays on the Title Insurance Premiums screen as black, system-generated data.

Split to: Select an order contact to receive a portion of the premium balance. The contact drop-down displays all contacts in an order.

Adjustment: Enter a dollar amount of the premium to be disbursed to the selected order contact.

Percent: Enter a percent of the premium to be disbursed to the selected order contact. The maximum allowed percentage is 100%.

% of: This field is used to select the basis to which the split should be calculated from. The first % of field always defaults to "**Final Premium to Split**" which is the premium to split minus any prior policy adjustments.

Final Premium/SI Net Premium Amounts: This indicates the amount being paid to the selected order contact.

Final Premium/Full Premium Amounts: This indicates the amount being paid to the selected order contact.

Bill code: Select the applicable bill code. This is for revenue reports.

Excess: The excess amount is the total remaining after the premium has been split.

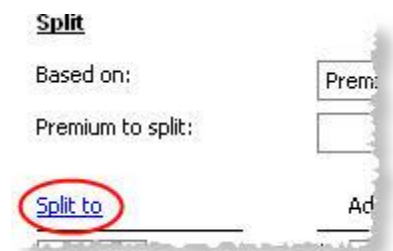
Excess to: Order contact code defaults to the order contact selected in SPAdmin Profiles for the HUD-1 line selected for the premium.

Default Splits

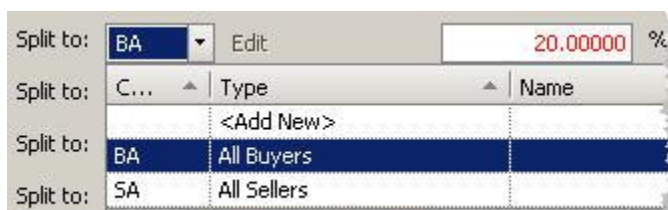
With the Default Splits dialog, you can enter multiple splits once and apply them to all policies, endorsements and additional title charges in an order. The default data entered can be overwritten by values in lookup tables, which appear as user-entered values, overwriting the system-generated defaults.

Entering Default Splits

1. To access the Default Splits screen, from the Title Insurance Premiums screen or the Endorsements screen, press the **Default Split** button.
2. The **Default Splits dialog** appears. HotSpots to the Default Split dialog are located on the Title Insurance Premiums and the Additional Title Charges screens.



3. In the Split to field, select an order contact to receive a portion of the premium balance. The contact drop-down displays all contacts in an order.
4. Enter a percentage of the premium to be disbursed to the selected order contact. The maximum allowed percentage is 100%.



5. This field is used to select the basis from which the split should be calculated. The first % of field always defaults to "Final Premium Split" which is the premium to split minus any prior policy adjustments.

Split to	Percent	Bill code
	% of	Final Premium to Split
	% of	Balance after 1st Split
	% of	Balance after 1st Split
	% of	Balance after 1st Split
	% of	Balance after 1st Split

Use default splits on endorsements
 Use default splits on additional title charges

Close

6. Select the applicable **Bill code**. Bill codes specified here will be appear in the HUD payee grid with its associated payee contact and amount. If a bill code is not selected, no bill code displays on the payee grid.

Checking the **Use default splits on endorsements** or **Use default splits on additional title charges** options sends the default splits to all endorsements or additional title charges in that order.

- If you change a default split on the Additional Title Charges screen (using the Default Splits dialog), that change appears in the Owner's & Loan Policy Default Splits dialog, therefore the splits for those premiums will be changed.
- If you change a default split on the Endorsements screen (using the Default Endorsement Splits dialog), the change will not carry over to the Default Splits dialog on the Owner's/Loan Policy, or the Additional Title Charges screen.

Commitment - Schedule A

From this screen you can add and remove a commitment or select an existing commitment for editing. New orders should have a default commitment added to them. **New Commitment** displays in the grid for this default commitment.

To add new or additional commitments, click on the **More/Less** bar to display the grid. When you click + (**Add**), a line will be added to the Commitment grid with the text **New Commitment** appearing in the Commitment Number column. The new commitment row will be selected and the remainder of Schedule A will be blank. As you fill in the commitment number the grid reflects the updated information.

As you add loan policies on this screen the associated loans appear in the Loan(s) column. The Schedule A screen is the only screen from which you can create and delete Commitments. Clicking the More/Less button should expand or collapse all fields below it on this snap section. This snap section is collapsed by default.

The following Commitment fields now write to the order history log per commitment: **Issued date/time, Effective date/time, Date/time commitment completed** and **Commitment lock status**.

Commitments/Prelims

The Commitments grid lists the commitments entered for this order. The number of commitments appears in parenthesis on the More/Less bar. Click the **title bar** to view the grid. Click a commitment in the grid to view it on the screen. See [Adding a Commitment](#) for more information.

Commitment/Prelim number: Enter the commitment number.

Underwriter: Click the arrow to select an underwriter. **Note:** Select **Add New** to add a new contact. Click the underwriter's name (hyperlink) to edit the selected underwriter.

Revision: To revise a commitment, you must first unlock the commitment. Each time you revise a commitment, the revision is incremented. This 5 character text field is unavailable and cannot be edited regardless of permissions. It will increment using either numbers (1, 2, 3) or letters (A, B, C) based on a new preference on the Profiles screen. Changes to this field should write to the **Order History Log**. Enter any detailed revision information in the associated text field.

Issued date/time: Enter the date and time when the commitment was issued.

Effective date/time: Enter the date and time when the commitment becomes effective.


Date/time commitment completed: Select a date and time the commitment was completed.

Completed by: Select a name from the drop-down list.

Lock status: Select the status, locked or unlocked (default). When the status is locked, the fields on the commitment will be read only. If you have permission to unlock files (set in SPAdmin) you can enter unlocked in the lock status field.

Policies to be Issued

This is a list of all policies (owner's and loan) associated with the title.

Policy Type: To manually add a new policy type (owner's or loan) to the commitment click the **Add** button .

Loan: Defaults from Premiums screen or select the loan from the drop-down list if a loan policy.

Policy lookup code: Enter the version lookup code or click the Policy lookup code hyperlink to search for the correct lookup code. For owner's and loan policies.

Coverage amount: The coverage amount will carry over from the Premiums screen for either owner's or loan policies, or enter an amount.

Coverage TBD: Check this box if the coverage amount will be determined at a later date.

Policy version: Displays the version selected via the Policy lookup code or entered manually and describes the type of policy to be issued. For owner's and loan policies.

Proposed insured lookup code: Enter the proposed insured lookup code or click the Proposed insured lookup code hyperlink to search for the correct lookup code.

Proposed insured: Displays the result of the lookup selection or entered manually and describes the insured entity such as buyer/borrower or lender. For owner's and loan policies.

Whenever a loan is added to an order, the Commitment Schedule A - Proposed insured field for the related loan policy now defaults to the lender's name and the Owner's policy Proposed insured now defaults to all buyer names.

Insured mortgage lookup code: Enter the insured mortgage lookup code or click the Insured mortgage lookup code hyperlink to search for the correct lookup code. For loan policies only.

Insured mortgage: Displays the policy description text for the insured mortgage based on the look up code selection, or entered manually. For loan policies only. This may or may not be used at commitment depending on your area.

Ownership Interest

Ownership Interest: Enter the term which describes the interest being insured, e.g. Fee Simple or Leasehold.

interest in the land...: Data entered into this field automatically based on the settlement type selected on the Order Information screen. If the settlement type is **purchase**, this field automatically fills in with the sellers' names from the Order Contacts screen. If the settlement type is **refinance** or **equity**, the default for the field will be the buyers' names from the Order Contacts screen. Default data can be overwritten.

Requirements shown: Enter the period of time that will be given to satisfy the requirements for the commitment (for example, 10 days).

Prepared for

Code: Click the drop-down to select a code for the order contact for whom the commitment was prepared.

Name: The name that displays depends on the code selected in the Code column. It cannot be edited.

Witness Clause

The witness clause serves to indicate that the title insurance document has been completed in the manner required by law in the presence of the witness who places his or her signature in the designated space. This clause is optional on the ALTA documentation. If this field is populated, it will be included on the appropriate ALTA schedules, once rendered.

Countersignature

Signature date: Enter the date on which the documents are to be signed.

Countersignature Lookup code: Enter the countersignature lookup code or click the countersignature lookup code hyperlink to search for the correct lookup code.

Countersignature text box: Enter a description of the countersignature.

Countersignature Fields

Select the **More/Less** bar to display the grid.

Company Name: Enter the name of the company for the person countersigning the commitment.

Signature Image: Attach an image file here. Click **Browse** to search for an image file. Click **View Image** to preview the image. Click **Clear Image** to undo the attachment.

By: Enter the name to be shown for the countersignature on the commitment.

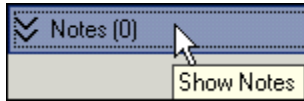
Title: Enter the title to be included under the countersignature line entered in the **By** field.

Properties

Properties: This table contains the list of title legal descriptions associated with particular property addresses entered in this order. These are automatically associated when you create a commitment. Click the checkbox in the Select column to associate or disassociate a property with the current commitment.




Notes

Several screens in SoftPro Select feature a Notes grid. Different users can save notes about an order or contact in Notes grids. Each Notes grid contains a title bar that displays the number of notes saved. **Click the bar** to show or hide the notes grid.



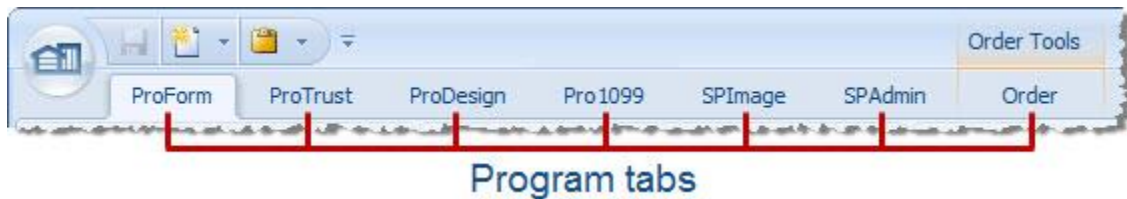
Each row in the grid displays information about a note: the note status (internal and/or linked), the user that created a note, the last modified date, and the note text. Double-click a note in the grid to expand it.

Order Notes Toolbar

	Add	Add item.	Insert
	Delete	Delete selected item from the grid.	Delete
	Search	Search the notes grid for text.	

Adding a Commitment

1. Click the **ProForm Program Tab**.



2. Select the **Commitment-Schedule A** screen.
3. The **Default commitment** is available to enter the applicable information.
4. To add additional commitments, select the **More/Less bar** to show the grid and add (+) a new line. Enter the commitment information as applicable.




Commitment - Schedules B1, B2

Commitment/Prelim: Click the arrow and select a commitment to view or edit. **Note:** This field is unavailable when there is only one commitment entered on the Commitment - Schedule A screen.

Numbering scheme: Click the drop-down to select an option for numbering or lettering the requirements and exceptions on the document. If numbering or lettering is not needed for any requirements or exceptions, this field can be left blank.

Begin Exceptions (or Requirements) at: Applicable when you have hard-coded requirements or exceptions on a document and you want to see how the ones on screen will be numbered. This does not affect how the document prints. For example, you can have 3 hard-coded requirements on a doc and enter 5 in the Begin Requirements at field. The doc will number correctly with the first one entered on screen starting at 4. The screen will show 5 since 5 was erroneously on screen.

Requirements and Exceptions: This field contains a hierarchical structure, similar to a family tree, of requirements and exceptions. The Lookup code for each requirement and exception is shown, along with a description.

- To move an item within the tree, select the item and click the arrow buttons.
- To add a new requirement or exception to a document, select the place in the tree where you want to insert it and click . See [Adding Requirements or Exceptions](#).
- To **delete a requirement or exception**, select it and click . **Note:** in order to delete a requirement or exception, users must have Edit permission in SPAdmin.
- To **copy a requirement or exception** select it, right-click and select Copy a Requirement or Exception from the pop up menu.
- To **paste a requirement or exception** select it, right-click and select Paste a Requirement or Exception from the pop up menu.
- To **cut a requirement or exception** select it, right-click and select Cut a Requirement or Exception from the pop up menu.
- To **import** a requirement and exception from another document, select the place in the tree where you want to insert it, right-click and select Import a Requirement or Exception from the pop up menu. See [Importing Requirements and Exceptions](#).
- To **preview a requirement or exception**, click the Preview Pane button  on the toolbar and then highlight the desired item. The preview pane will display the text and properties of that item. To close the preview pane, click the Preview Pane button again to hide the preview pane.


Adding Requirements or Exceptions

COMMITMENT

1. Click the ProForm Program Tab.

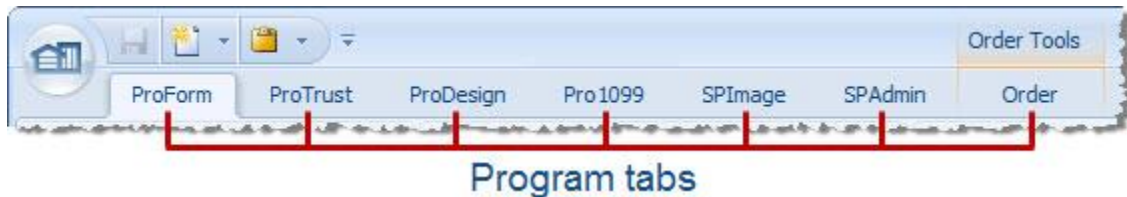



2. Select **Title**, then **Commitment - Schedules B1, B2** screen.
3. Select the **Requirements** or **Exceptions** folder to activate the toolbar.

4. Click the **Add**  button on the **Requirements and Exceptions** toolbar.
5. The **Add Requirement and Exception** dialog appears.
6. In the **Type** field, select **Requirement** or **Exception**.
7. Enter a Lookup code (**F9** or click **Code** hyperlink) to retrieve a requirement or exception (entries that appear depend on type selected).
8. If adding an exception, select **Include on Loan Policy** and/or **Owner's Policy**.
9. Select **Show on document** to display on the document. **Show with numbering** is optional.
10. Click **Save and Add New** to add another requirement or exception, or **OK** to save and exit.

OWNER'S POLICY

1. Click the ProForm **Program Tab**.




2. Select **Title**, then **Policy - Schedules B1, B2** from the navigation bar.
3. Select the **Exceptions** folder to activate the toolbar.
4. Click the **Add**  button on the toolbar.
5. The **Add Exception** dialog appears.
6. In the **Type** field, select **Exception**.
7. Enter a Lookup code (**F9** or click **Code** hyperlink) to retrieve an exception (entries that appear depend on type selected).
8. Select **Include on Loan Policy**, if applicable.
9. Select **Show on document** to display on the document. **Show with numbering** is optional.
10. Click **Save and Add New** to add another requirement or exception, or **OK** to save and exit.

LOAN POLICY

1. Click the ProForm **Program Tab**.

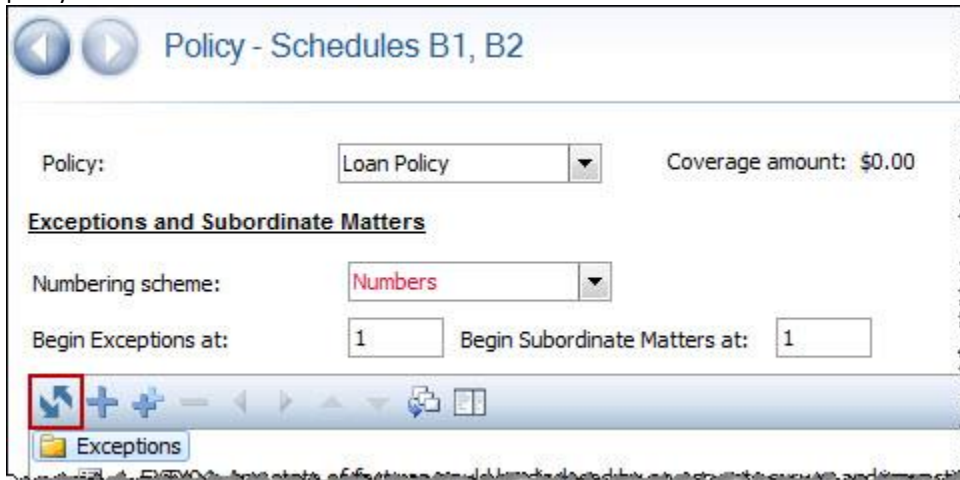


2. Select **Title**, then **Policy - Schedules B1, B2** from the navigation bar.
3. Select the **Exceptions** or **Subordinate Matters** folder to activate the toolbar.
4. Click the **Add**  button on the toolbar.
5. The **Add Exception or Subordinate Matter** dialog appears.
6. In the **Type** field, select **Exception** or **Subordinate Matter**.


7. Enter a Lookup code (**F9** or click **Code** hyperlink) to retrieve an exception (entries that appear depend on type selected).
8. If adding an exception, select **Include on owner's policy**, if applicable.
9. Select **Show on document** to display on the document. **Show with numbering** is optional.
10. Click **Save and Add New** to add another requirement or exception, or **OK** to save and exit.

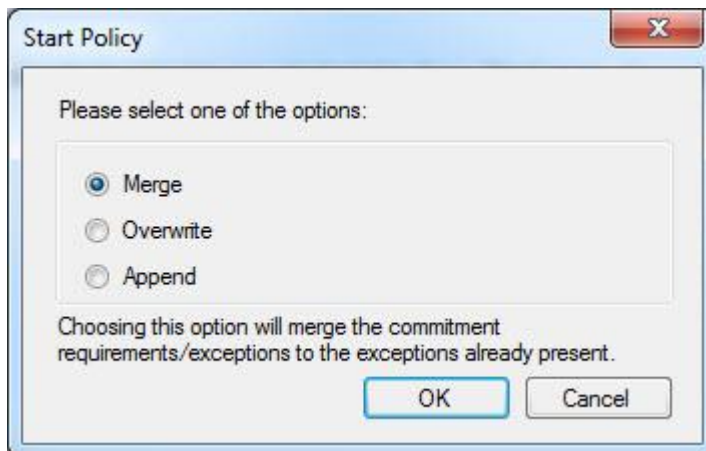
Start Policy Option

On the **Policy - Schedules B1, B2** screen, users have the option to copy exceptions from the commitment or other policies to the policy exceptions. There is an option to overwrite, append, or merge any existing exceptions on the policy screen.



To bring over the exceptions from the commitment screen:

1. Select the **Exceptions** folder to activate the toolbar.
2. Click on the **Start Policy**  button .
3. If there are no existing exceptions, the commitment exceptions will populate the tree immediately. If there are existing exceptions, the **Start Policy dialog** appears and the user must select between the **Merge, Overwrite, or Append** options:



The **Merge option** compares the commitment requirements/exceptions (the same data as is displayed on the policy instructions screen) to the exceptions already present on the selected policy. When merging:

- Items on the commitment that are no longer on the policy will be removed.
- New items on the commitment are added to the policy.
- Text edited on the commitment is updated on the policy.
- Text updated on the policy will not be overwritten by the original commitment data.
- Items added directly to the policy are left as is during the merge.

The **Overwrite** option removes any existing exceptions in the tree, leaving only the commitment exceptions.

The **Append** option places the commitment exceptions in the tree below the existing policy exceptions.

Ruler and Tab Functions when Adding or Editing Requirements and Exceptions

If you need to format requirement and exception data into columns, you can use the ruler or the Tabs dialog to set precise tab stops. The number of aligned columns is limited to the width of the document. Using too many tabs stop positions can cause data to be cut off.

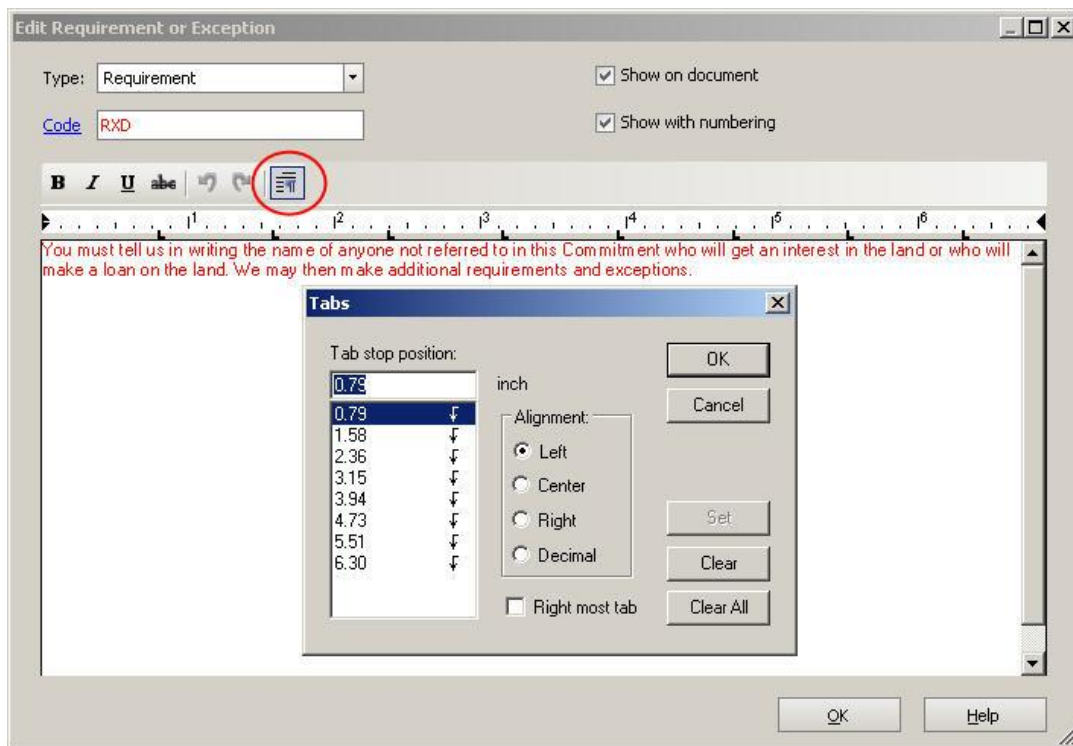
Note: The hanging indent located at the left side of the ruler is not currently a supported feature. If using the hanging indent, the tab stop position is not guaranteed to appear on the document as it has been set up.



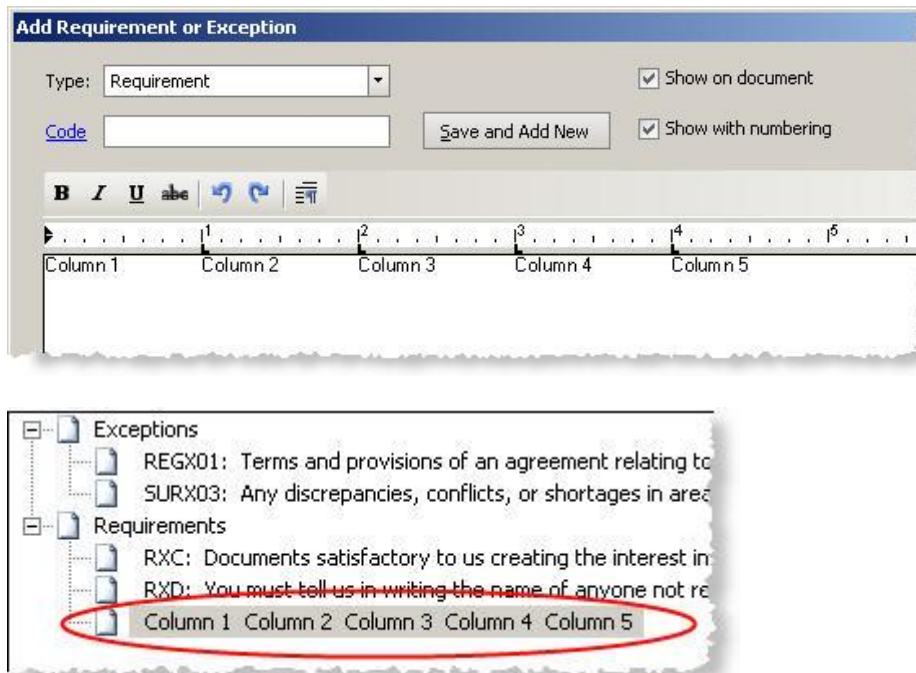
Hanging indent

Setting up Tab Stops

1. To open the Tabs dialog from the Add or Edit Requirement or Exception dialog, press the **Tabs** button. The Tabs dialog appears.



2. Enter the tab stops positions. Press **Set** to apply the tab stop. Select the alignment and check the **Right most tab** option, if necessary. Press **Clear** to discard the tab stop entirely. Press **Clear All** to discard all tab stop entries. Press **OK** to apply changes.
3. This is what applied tabs look like:



The results of a modified requirement after tab stops have been applied.

Importing Requirements and Exceptions

Use these instructions to add a requirement or exception to a document by importing one from another document.

1. Click the **ProForm, Title**, then select the **Commitment - Schedule B1, B2** screen or the **Policy Schedules B1, B2** screen.
2. Select either **Exceptions** or **Requirements** to activate the toolbar.
3. Place your cursor in the grid and right-click to select **Import Requirements** or **Exceptions** from the pop up menu or **CTRL+I** to import an exception or requirement:



4. The **Import Exception or Subordinate Matter** dialog appears.

Import Requirement or Exception: Use this dialog to select requirements and exceptions to import. Users can import one or more existing requirements and exceptions from the commitments deeds and policies in the order. Click **OK** to import the selected requirements and exceptions or **Cancel** to exit without saving.

Import: Specify how to import items, either as an exception or a requirement.

Selecting Items to Import

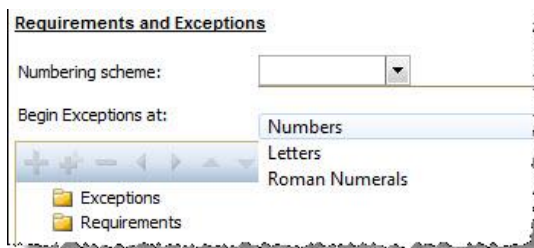
- The document tree that appears contains the existing requirements and exceptions for each document in the order.
- To import a requirement or exception, browse for it and check the box that is beside it. Users can choose to import more than one.
- Checking the box beside a document name causes all requirements and exceptions from that document to import. Uncheck the box beside those requirements and exceptions to exclude from import.

Numbering Requirements and Exceptions

1. Click the ProForm Program Tab.




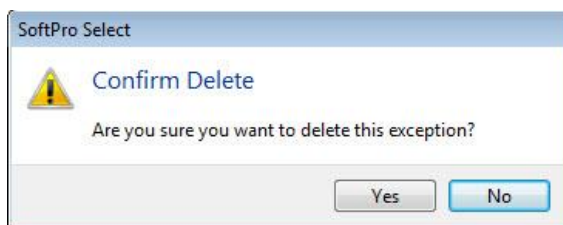
2. Select the **Title**, then **Commitment - Schedules B1, B2** or **Policy - Schedules B1, B2** screens.
3. **Numbering scheme:** Select the numbering format for the requirements/exceptions.



Deleting Requirements and Exceptions


COMMITMENT

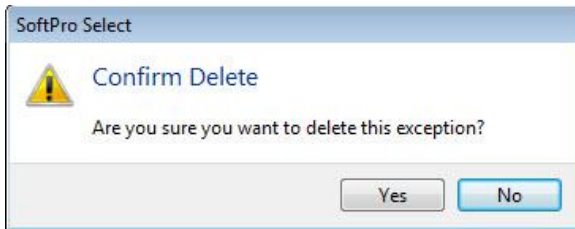
1. Click the ProForm Program Tab
2. Select the **Commitment-Schedules B1, B2** screen.
3. Highlight the requirement or exception to delete to activate the toolbar.
4. Click the delete button  to delete the entry. A prompt appears confirming the deletion of the requirement/exception.



5. Click **Yes** to delete the selected exception/requirement or **No** to cancel the action.

POLICIES

1. Click the ProForm Program Tab
2. Select the **Policy-Schedules B1, B2** screen.
3. Highlight the exception or subordinate matter to delete to activate the toolbar.
4. Click the delete button  to delete the entry. A prompt appears confirming the deletion of the exception/subordinate matter.



5. Click **Yes** to delete the selected exception/subordinate matter or **No** to cancel the action.

Commitment for Title Insurance (Schedule D)

This screen is for entering the data for Schedule D of the Title Commitment. Schedule D is required by TDI (Texas Department of Insurance).

Commitment/Prelim: Select a commitment to view.

Estimated Title Premium

Include in total: Check to include the amount of the guaranty fee in the total estimated premium.

Policies and Fees: The grid automatically populates with the policies added on the Commitment – Schedule A screen. This column can not be edited and rows can not be added or removed.

Amount: The grid automatically populates with the final premium amount for each policy.

Total Estimated Premium: Displays the sum total of all items listed in the Policies and Fees grid.

Guaranty Fee

The total of the Guaranty Fees on Title Insurance Premiums populates in the Estimated Title Premium grid when the policy premiums are greater than 0.00. The Guaranty fee Description, Amount, Bill code, Line, and Payee appear on the Title Insurance Premiums screen for each policy when the **Use 2009 RESPA regulations for HUD-1 & HUD-1A option is checked**, and Bill code, Line, and Payee appear on the Commitment Schedule D screen when the option is unchecked. Here is how it the Guaranty Fee appears on Schedule D when the option is unchecked:

Estimated Title Premium

Include in total

Policies and Fees	Amount	Guaranty Fee
		Bill code: <input type="text"/> Line: <input type="text"/> Payee: <input type="text"/>

Total estimated premium:

Of this amount, will be paid to the policy issuing Title Insurance Company; will be retained by the issuing Title Insurance Agent; and the remainder of the estimated premium will be paid to other parties as follows:

Bill Code: Select the applicable bill code. This is for revenue reports.

Line: Select the HUD line on which to display the guaranty fee amount.

Payee: Enter or select a payee.

Of this amount...: Enter the amount of the title premium here.

...will be retained by...: Enter the amount or percentage of the estimated title premium which will be paid to the policy issuing title insurance agent.

Remainder Breakdown

Percent or Amount: Enter the amount of premium to be paid to another party to appear on the Commitment for Title Insurance Schedule D (Texas Only).

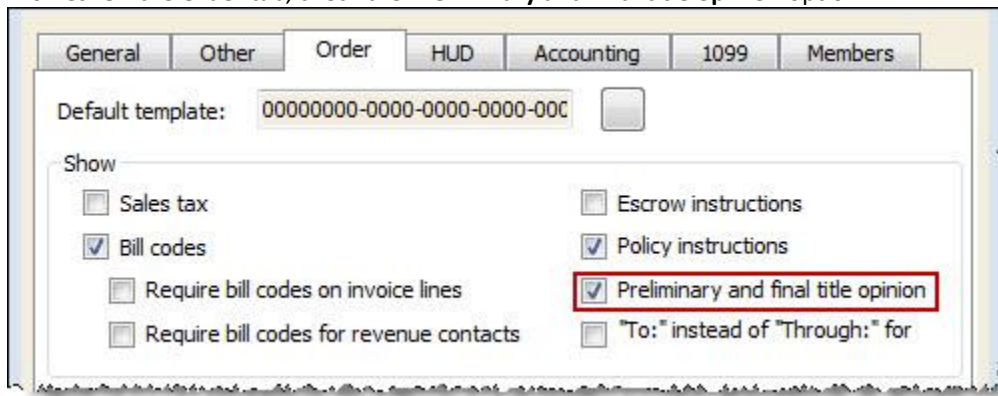
Code: Indicates the order contact code of the person or organization associated with the commitment.

To Whom: Enter the name of the party receiving the premium specified in the Amount field.

For Services: Enter the service or reason for which the party specified in the To Whom field is being paid the premium entered in the Amount field.

Final Title Opinion

The **Final Title Opinion screen** may be enabled in SPAdmin. To enable the screen, go to SPAdmin and click on Profiles. On the Order tab, check the **Preliminary and final title opinion** option:

A screenshot of the SPAdmin software interface, specifically the 'Order' tab. The interface shows a 'Default template' field with the value '00000000-0000-0000-0000-00C'. Below this is a 'Show' section with several checkboxes. The 'Preliminary and final title opinion' checkbox is checked and highlighted with a red box. Other checkboxes include 'Sales tax', 'Escrow instructions', 'Bill codes', 'Policy instructions', 'Require bill codes on invoice lines', 'Require bill codes for revenue contacts', and '"To:" instead of "Through:" for'.

Property: The number refers to the property for which the title is prepared.

Title certified to date/time: Enter the date on which the title was certified for the Final Title Opinion.

Date/Time completed: Enter a date and time the final title opinion was completed.

Completed by: Select a name from the drop-down list.

Eliminated requirements: On the blank line provided, fill in the number(s) of the requirements that are to be eliminated from the Preliminary Opinion. **Note:** If you have entered the search period end date/time on the Preliminary Title Search & Opinion, it will appear spelled out.

Prepared for: Enter the party for which the title opinion is prepared.

Remarks: Use this scrollable field for any optional remarks to be included with the Final Title Opinion.

Deeds: This field is completed from the information completed within the Deed screen and when the legal description box on the Deed screen is checked.

Security instruments: Contains information from the Loan-Security Instrument screen. Click the instrument hyperlink to go to the Loan-Security Instrument screen and enter the applicable final policy information.

Send owner's policy/loan policy to: Select or add a name(s) to which the policies will be delivered.

Policy - Schedule A

Policy: From the drop-down, select the appropriate policy.

Policy number: The number is automatically entered here from the Title Premium screen.

Issued date/time: Select a time and date the policy was issued.

Effective date/time: Select a time and date the policy is effective.

Date/Time completed: Select a time and date the policy was completed.

Completed by: Enter the name of the person who completed the policy.

Lock status: Select locked or unlocked.

Proposed Insured Lookup code: Enter the insured lookup code or click the Insured lookup code hyperlink to search for the correct lookup code.

Proposed Insured text box: Enter the name of the proposed insured as entered on the buyer/borrower screen and the proposed insured code as previously selected. This field automatically populates if you retrieve an entry from the Lookup table for the proposed insured lookup code.

Interest in the Land text box: Enter the term which describes the interest being insured, i.e., "Fee Simple," or "Leasehold".

Title Vesting Lookup code: Enter a Look-up table code in this field to fill in the Vested In text for the Loan/Mtg Policy.

Title Vesting text box: Enter a description of the instruments creating the estate or interest in real estate that is being insured for use on the Loan/Mtg Policy. This field automatically populates if you retrieve an entry from the Lookup table for the proposed insured lookup code.

Insured mortgage lookup code: Enter the version lookup code or click the Version lookup code hyperlink to search for the correct lookup code. This may or may not be used at commitment depending on your area.

Insured mortgage: The applicable policy description text for the insured mortgage will populate here as per the selection at the insured mortgage look up code and entries made in the program. This may or may not be used at commitment depending on your area.

Additional Policy Information

LEASEHOLD POLICY:

- **The lease is identified as follows:** Enter a description of the lease.
- **The leasehold term insured is:** Enter information about leasehold term.

IF POLICY IS A LOAN POLICY:

ALTA Limited Coverage Junior Loan Policy:

- **Tax information:** Enter the tax information

ALTA Short Form Residential Loan Policy:

- **Number of pages:** Enter the amount of pages.
- **Addendum attached:** Check if an addendum is attached.

If policy is an **owner's** policy:

ALTA Homeowner's 1-4 Family:

- **Your deductible amount:** Enter a dollar amount.
- **Percent of Policy Amount:** Enter a percentage.
- **Our Maximum Dollar Limit of Liability:** Enter the maximum dollar amount.

Note: Additional Policy covered risk fields on the Policy Schedule A screen have been updated to match ALTA standards:

- Prior Covered risk 14 is now Covered risk 16
- Prior Covered risk 15 is now Covered risk 18
- Prior Covered risk 16 is now Covered risk 19
- Prior Covered risk 18 is now Covered risk 21

Witness Clause

The witness clause serves to indicate that the title insurance document has been completed in the manner required by law in the presence of the witness who places his or her signature in the designated space. This clause is optional on the ALTA documentation. If this field is populated, it will be included on the appropriate ALTA schedules, once rendered.

Countersignature Fields

Signature date: Enter the date on which the documents are to be signed.

Countersignature Lookup code: Enter the countersignature lookup code or click the countersignature lookup code hyperlink to search for the correct lookup code.

Countersignature text box: Enter a description of the countersignature.

Properties

Properties: This table contains the list of final title legal descriptions associated with particular property addresses entered in this order. These are automatically associated when you create a policy. Click the checkbox in the Select column to associate or disassociate a property with the current policy.

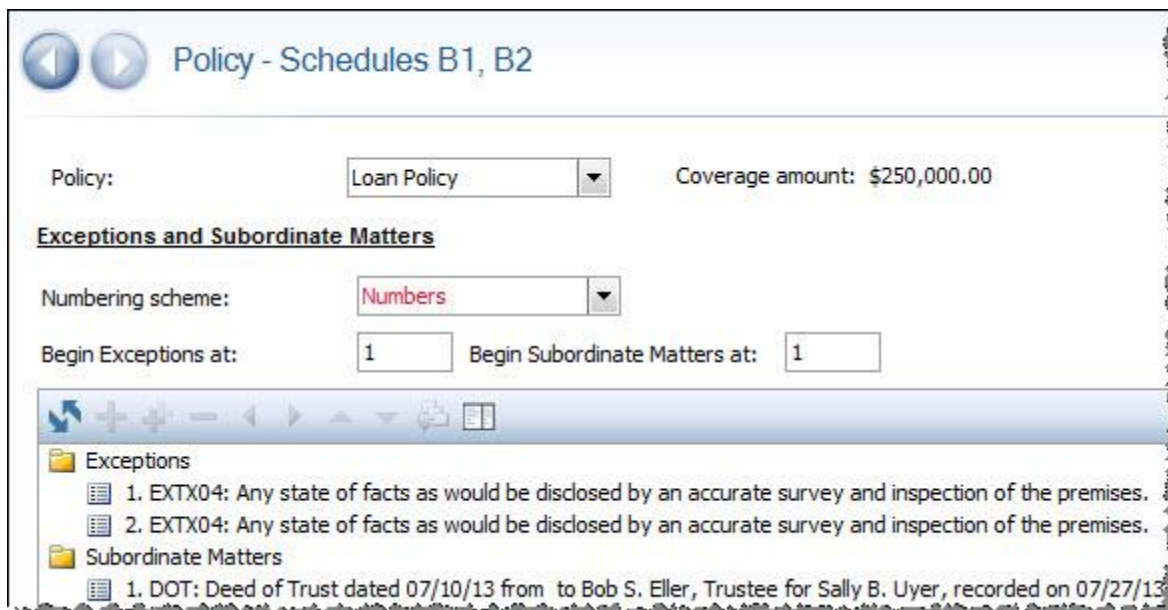
Policy - Schedules B1, B2

Policy: Select or add a type from the drop-down list.





Numbering scheme: Select a scheme such as numbers, letters or roman numerals.

Begin Exceptions/Subordinate Matters at: Applicable when you have hard-coded requirements or exceptions on a document and you want to see how the ones on screen will be numbered. This does not affect how the document prints. For example, you can have 3 hard-coded exceptions on a doc and enter 5 in the Begin Exceptions at field.

The doc will number correctly with the first one entered on screen starting at 4. The screen will show 5 since 5 was erroneously on screen.




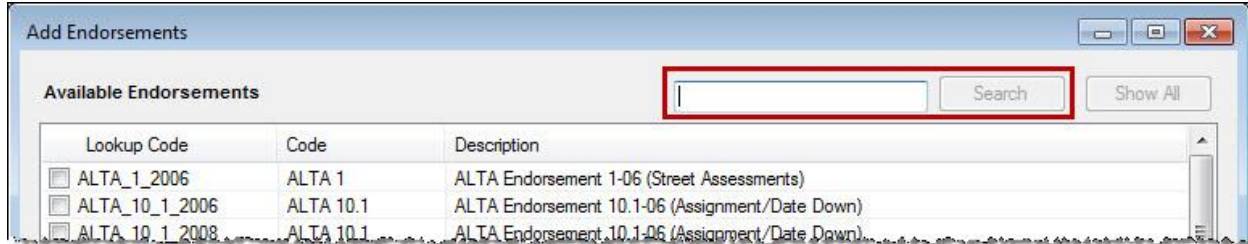
Exceptions and Subordinate Matters: This field contains a hierarchical structure, similar to a family tree, of documents, requirements, and exceptions. The Exceptions tree contains all of the commitments, deeds, loan policies, and owner's policies in the order. Double-click a folder to view the exceptions or subordinate matters attached to it. The Lookup code for each exception or subordinate matter is shown, along with a description.

- To move an item within the tree, select the item and click the arrow buttons.
- To add a new requirement or exception to a document, select the place in the tree where you want to insert it and click  or . See [Adding Requirements or Exceptions](#).
- To **delete an exception or subordinate matter**, select it and click . **Note:** In order to delete an exception or subordinate matter, users must have Edit permissions in SPAdmin.
- To **copy an exception or subordinate matter** select it, and then right-click and select the **Copy** option from the pop up menu.
- To **paste an exception or subordinate matter** select it, and then right-click and select the **Paste** option from the pop up menu.
- To **cut an exception or subordinate matter** select it, and then right-click and select the **Cut** option from the pop up menu.
- To **import** an exception from another document, select the place in the tree where you want to insert it, right click and select Import Exceptions or Subordinate Matters from the pop up menu. See [Importing Requirements and Exceptions](#).
- To **preview an exception or subordinate matter**, click the Preview Pane button  on the toolbar and then highlight the desired item. The preview pane will display the text and properties of that item. To close the preview pane, click the Preview Pane button again to hide the preview pane.


Endorsements

Title product: Select a title product from the drop-down list. Fields include: Product number, Underwriter type and Coverage amount.

Add button: Click the  button to add an endorsement. This opens the **Available Endorsements** dialog, which displays a list of all endorsements that have been added to the Endorsement lookup table. When an endorsement is selected from this dialog, the data is retrieved from the lookup table.



To search available endorsements, type into the text box and click the search button. This will search any and all lookup codes, endorsement codes, and descriptions present in the lookup table. The **Search** button will be disabled until text is entered into the search box. The **Show All** button resets the list of endorsements.

Delete button: Click the  button to delete an endorsement.

Lookup code: Key field in the Endorsement lookup table.

Code: Short name for the endorsement.

Description: Enter a description of the endorsement.

Transaction code: Enter any transaction code required by your state or title insurance underwriter. This code will be shown on the policy register report.

New liability amount: Enter the coverage amount for the endorsement if different from the loan/owners coverage amount.

Issued date: Enter the endorsement issued date.

Effective date: Enter the effective date of the endorsement.

Calculate charge

Minimum charge: Enter any minimum charge.

Maximum charge: Enter any maximum charge.

Charge based on: Select an item on which to base the charge.

Amount: Depending on what is selected to be charged on the applicable amount will pull in from the system.

Multiplication %: Enter the percent of the base you want to use to calculate the charge.

Calculate charge per \$1000: When selected, calculated based on what is selected in the **Charge based on** drop-down. You can enter a figure up to three digits to calculate by. The calculation results appear in the **Charge** field.

Adjustment +/-: Enter any additional amount to add to the charge. Include a minus sign to subtract the amount.

Seller pay %: To split this endorsement between buyer/borrower and seller, enter the percentage the seller is to pay. You may enter a percentage including up to two decimal places.

Charge: Enter the endorsement charge. Will also total the percentage of an endorsement.

Taxable: Check this option to indicate if the charge is taxable. **Note:** This option is visible only when the **Sales Tax** option in **SPAdmin, Preferences, ProForm Order Options** is checked.

Line: Select the **CDF** or **HUD-1** line number on which you want the endorsement shown.

- **Note:** With CDF orders, choosing a specific line or the next available option will override the **Group endorsements** setting on the [Options](#) screen.
- For best practices on how to populate this CDF line, view the [CDF line drop-down help](#) for title screens.

Disclosure: This checkbox is only visible if the **Use 2009 RESPA** option is checked. If this box is checked, the borrower amount appears in the Disclosure amount field for the selected HUD-1 line. If this box is unchecked, the borrower amount appears in the Borrower amount field for the selected HUD-1 line. If an amount is sent to a HUD-1 line and there is a Seller Pay%, only the borrower's portion will be sent to the Disclosure amount if this checkbox is checked

Description: This field accommodates CDF requirements, which specify that the "Title –" prefix be added to **all title-related charges**; it may be edited manually. These prefixes are added automatically to the existing descriptions that show on screen. The two exceptions to this requirement are the Lender's Policy and Owner's Policy, which have descriptions that are generated by the application.

Invoice: Enter the amount of this invoice item.

Bill code: Enter the applicable bill code. This code is used by accounting for revenue reporting.

Split

Based on: This is how the split will be calculated. You can choose between **Split Rate Table** and select the applicable rate or **Premium Calculation** and select the applicable premium that the split should be calculated off of.

Premium to split: Enter the base premium amount for the split.

Prior policy adjustment: Prior policy adjustments if necessary before the final split premium is determined.

Final premium to split: Indicates the net amount of premium to split minus any prior policy adjustments.

Split to hotspot: Click to open the [Default Endorsements Splits dialog](#) and view or edit multiple splits. **Note:** Data entered on the Default Endorsement Splits dialog displays on the Endorsements screen. The data for these fields defaults from the Default Splits dialog on the TIP screen as long as the "Use default splits on endorsements" checkbox is selected. The defaulted data can be overridden & will display only on the Endorsements screen.

Split to: Select an order contact to receive a portion of the premium balance. The contact drop-down displays all contacts in an order.

Adjustment: Enter a dollar amount of the premium to be disbursed to the selected order contact.

Percent: Enter a percent of the premium to be disbursed to the selected order contact. The maximum allowed percentage is 100%.

% of: Select the remaining balance after the premium is split. The first split to field always defaults to "Final Premium to Split". The first option matches the wording in the field split section that contains the amount being split. This field is used to select the basis to which the split should be calculated from. The first % of field always defaults to "Final Premium to Split" which is the premium to split minus any prior policy adjustments.

Amount: This indicates the amount being paid to the selected order contact.

Bill code: Enter the applicable bill code. This code is used by accounting for revenue reporting.

Excess: Excess amount calculates the amount remaining after the premium balance has been split. The excess amount is the total remaining after the premium has been split.

Excess to: Order contact code defaults to the order contact selected in SPAdmin Profiles for the HUD-1 line selected for the premium.

Witness Clause

The witness clause serves to indicate that the title insurance document has been completed in the manner required by law in the presence of the witness who places his or her signature in the designated space. This clause is optional on the ALTA documentation. If this field is populated, it will be included on the appropriate ALTA schedules, once rendered.

Additional Title Charges

Policy: Select the code for the policy to which you want this additional title charge attached.

Coverage amount: Enter the coverage amount for the policy to which you want this additional title charge attached.

Description: Enter a brief description of this additional title charge.

Transaction code: Enter any transaction code required by your state or title insurance underwriter. This code will be shown on the policy register report.

Issued date: Enter the endorsement issued date.

Effective date: Enter the effective date of the endorsement.

Calculate charge

Minimum charge: Enter any minimum charge.

Maximum charge: Enter any maximum charge.

Charge based on: Select an item on which to base the charge.

Amount: Enter the amount of this additional title charge.

Multiplication %: Enter the percent of the base you want to use to calculate the charge.

Calculate charge per \$1000: when selected, calculated based on what is selected in the charge based on drop-down. You can enter a figure up to three digits to calculate by. The calculation results appear in the charge field.

Adjustment +/-: Enter any additional amount to add to the charge. Include a minus sign to subtract the amount.

Seller pay %: To split this additional title charge between buyer/borrower and seller, enter the percentage the seller is to pay. You may enter a percentage including up to two decimal places.

Charge: Enter the amount of the additional title charge.

Taxable: Check this option to indicate if the charge is taxable. **Note:** This option is visible only when the **Sales Tax** option in **SPAdmin, Preferences, ProForm Order Options** is checked.

Line: Select the **CDF** or **HUD-1** line number on which you want the charge shown.

- **Note:** With CDF orders, choosing a specific line or the next available option will override the **All Other Title fees** setting chosen on the Options screen.
- For best practices on how to populate this CDF line, view the [CDF line drop-down help](#) for title screens.

Disclosure: This checkbox is only visible if the **Use 2009 RESPA** option is checked. If this box is checked, the borrower amount appears in the Disclosure amount field for the selected HUD-1 line. If this box is unchecked, the borrower amount appears in the Borrower amount field for the selected HUD-1 line. If an amount is sent to a HUD-1 line and there is a Seller Pay%, only the borrower's portion will be sent to the Disclosure amount if this checkbox is checked

Description: This field accommodates CDF requirements, which specify that the "Title –" prefix be added to **all title-related charges**. This prefix is added automatically to the existing description that shows on screen; it may be edited manually. The two exceptions to this requirement are the Lender's Policy and Owner's Policy, which have descriptions that are generated by the application.

Invoice: Select the invoice to send the charge to.

Bill code: Select the applicable bill code. **Note:** The list of codes are filtered by state if bill codes have been specified for a particular state in the **Drop-Down List Editor** in **SPAdmin**. This code is used by accounting for revenue reporting.

Split

Based on: This is how the split will be calculated. You can choose between **Split Rate Table** and select the applicable rate or **Premium Calculation** & select the applicable premium that the split should be calculated off of.

Premium to split: Enter the base premium amount for the split.

Prior policy adjustment: Prior policy adjustments if necessary before the final split premium is determined.

Final premium to split: Indicates the net amount of premium to split minus any prior policy adjustments.

Split to hotspot: Click to open the [Default Splits dialog](#) and view or edit multiple splits. **Note:** Data entered on the Default Splits dialog displays on the Title Insurance Premiums screen as black, system-generated data.

Split to: Select an order contact to receive a portion of the premium balance. The contact drop-down displays all contacts in an order.

Adjustment: Enter a dollar amount of the premium to be disbursed to the selected order contact.

Percent: Enter a percent of the premium to be disbursed to the selected order contact. The maximum allowed percentage is 100%.

% of: Select the remaining balance after the premium is split. The first split to field always defaults to "**Final Premium to Split**". The first option matches the wording in the field split section that contains the amount being split. This field is used to select the basis to which the split should be calculated from. The first % of field always defaults to "**Final Premium to Split**" which is the premium to split minus any prior policy adjustments.

Amount: Indicates the amount remaining after the premium is split. This indicates the amount being paid to the selected order contact.

Bill code: Select the applicable bill code. **Note:** The list of codes are filtered by state if bill codes have been specified for a particular state in the **Drop-Down List Editor** in **SPAdmin**. This code is used by accounting for revenue reporting.

Excess: Excess amount calculates the amount remaining after the premium balance has been split. The excess amount is the total remaining after the premium has been split.

Excess to: Order contact code defaults to the order contact selected in SPAdmin Profiles for the HUD-1 line selected for the premium.

Escrow/Closing Screens Overview

The Escrow/Closing screens provide the user with the ability to quickly generate CDF/HUD-1 Settlement Statements, Master Settlement Statements, and Estimated Settlement Statements with one-time data entry, as well as the flexibility to designate any order contact as paying or receiving fees from closing.

The **Escrow/Closing screens** are accessible from the **SoftPro Screens** left navigation pane.

General

Loan

Title

Escrow/Closing

City/Town Taxes

Tax Status and Dates

City/Town tax or other purpose: Enter a description of the taxes. The default for this field is City/Town Taxes. This field will print on the CDF/HUD-1 settlement statement in the line designated in Show tax figures on CDF/HUD-1 and/or Escrow CDF/HUD-1 line. The laws outlined in CDF and HUD regulations apply to manual entries made here.

Note: The City/Town tax or other purpose field is disabled unless the CDF or HUD Edit permission is granted in SPAdmin.

Tax payment status: Select one of the following options from the drop-down list. Your choice will affect the way taxes are prorated between the buyer/borrower and seller. If taxes are being paid at closing, a disbursement will be created. Note: If the property is not subject to city/town taxes, do not enter a status.

- Watch a video walk-through on [using prorations »](#)

Option	Description
Unpaid - Credit Buyer	<p>The buyer/borrower is responsible for paying current period taxes later in the tax period.</p> <p>For CDF orders, The seller's portion of the taxes will be shown on Pg 3, lines L.12 & N.14.</p> <p>For HUD-1 orders, the seller's portion of the taxes will be shown on lines 210 & 510.</p>
Paid - Credit Seller	<p>The seller is to pay (or has already paid) current period taxes.</p> <p>For CDF orders, the buyer/borrower's portion of the taxes will be shown on Pg 3 lines K.08 & M.09.</p> <p>For HUD-1 Orders, the buyer/borrower's portion of the taxes will be shown on 106 & 406.</p>
No Proration - Escrow Only	<p>No proration of taxes will be done at closing and the following fields will be disabled: Current tax period proration date, Seller's portion is, days of, Show tax figures on HUD-1, HUD-1 Figures , and Tax Prorations (CDF).</p> <p>HUD-1 orders: City/Town, County, & Assessment taxes will be escrowed and the escrowed amount will show on line 1004; it can be manually changed to another escrow line.</p> <p>CDF orders: City/Town, County, & Assessment taxes will be escrowed and the escrowed amount will show on Pg 2, line G.03; it can be manually changed to another escrow line.</p>
Pay Total Tax	<p>The total tax amount will be paid to the taxing authority at closing.</p> <p>HUD-1 orders: By default, the buyer's and seller's portions will not be sent to a HUD-1 line until a</p>

1300 line is selected in the Show tax figures on HUD-1 drop-down.

Pay Seller's Portion

CDF orders: The drop-down default to F.04 but can be changed to any Section F. line.
Only the seller's portion of taxes will be paid to the taxing authority at closing.

HUD-1 orders: By default, the seller's portion will show on 510 (City/Town Taxes), 511 (County Taxes), and 512 (Assessments). However, this default can be changed for a selection available in the Show tax figures on HUD-1 drop-down.

Pay Buyer's Portion

CDF orders: the 3 tax screens default to F.04, but can be changed to any Section F. line.
Only the buyer/borrower's portion of taxes will be paid to the taxing authority at closing.

HUD-1 orders: By default, the buyer's portions will not be sent to a HUD-1 line until a 1300 line is selected in the Show tax figures on HUD-1 drop-down.

CDF orders: the 3 tax screens default to F.04, but can be changed to any Section F. line

City/Town taxes lookup code: Enter a lookup code to retrieve tax information from the Lookup table or press **F9** to select from the Lookup table. See Lookup Tables for more information about storing and reusing information.

Current tax period from: Enter the beginning and ending dates for the current tax period. Taxes will be calculated based on the number of days into the current tax period and the Current tax period proration date. Other variables that affect the calculation include: Use **30-day months** and **Charge buyer for Proration Date in all Prorations** on the Order Information screen. Note: Do not use the city and county tax or assessments screens for past due taxes. Instead, use **Debit Lines** in the following sections of a HUD-1 order, as past due taxes are considered another bill owed by the seller(s): 1300 and 500. **For CDF orders**, use Page 2 Section H. and Page 3 Section N.

On the **Properties** screen in SPAdmin under Profile Management, use the **To** instead of **Through** for prorations preference to default the **Though** to To label for tax periods and proration periods. This option will change **Through** to To on the **Current tax period**, all selected **HUD-1 lines**, and the **HUD-1 Figures** sections of the tax screens.

Note: For the **City/Town**, **County**, and **Assessment** screens, when the defaulted reserved HUD-1 line is used in the **Show Tax Figures on HUD-1** drop-down, the **HUD-1 Figures** section must use **To** regardless of the preference per RESPA regulations.

Current tax period proration date: Defaults from the Proration date on the Order Information screen, however, it can be overwritten. Taxes will be calculated based on the number of days into the current tax period and the Current tax period proration date.

Use short proration start date of: Select this option to allow proration of taxes to begin at a date different than the Current tax period proration date. This option is provided primarily for Ohio. The checkbox and the date will be visible only if the **Short Proration** option is checked within the user's profile in **SPAdmin**. If a Current tax period proration date is not entered, the Use short proration start date of will be blank. Once a Current tax period proration date is entered, if it is less than 07/01, then 01/01 will default in this field. If greater than or equal to 07/01, then 07/01 will default in this field. The date can be overwritten.

Seller's portion is: The first field is the amount of days out of the current tax period for which the seller is responsible. The second field is the amount of days in the current tax period. These fields will default when the Current tax period and the Current tax period proration date contain data.

Note: This field will be filled in by default with a number based on the **Current tax period proration date**. You can overwrite the defaulted entry if the seller's portion is to be based on a different number. To have the buyer/borrower charged for the day of closing in fee prorations, select the **Charge buyer for proration date** option on the **Order Information** screen.

Use 30-day months: Select this option to base the prorating of this item on a 360-day year. When selected, ProForm will calculate the number of days the buyer or seller is responsible for using 30 day months.

Show tax figures on CDF/HUD-1:

CDF:

- **No Proration – Escrow Only:** With this default option, taxes will appear on CDF Page 2 Section G.
- **Unpaid – Credit Buyer/Paid – Credit Seller:** the field is dimmed (unavailable) and defaults the CDF reserved line for taxes.
- **Pay Total Tax/Pay Seller's Portion/Pay Buyer's Portion:** the field will be enabled and default to the CDF reserved line for taxes; an alternate CDF line may be selected.

HUD-1:

- **No Proration – Escrow Only:** With this default option, taxes will appear on Escrows (1000) section.
- **Unpaid – Credit Buyer/Paid – Credit Seller:** the field is dimmed (unavailable) and defaults the HUD-1 reserved lines for taxes.
- **Pay Total Tax/Pay Buyer's Portion:** the default is blank; a line must be chosen.
- **Pay Seller's Portion:** the field will be enabled and default to the reserved line for taxes; an alternate line can be selected.

Show tax figures as POC: Select this option to have all tax figures shown as Paid Outside of Closing (POC) on the HUD-1 Settlement Statement. A POC notation will be made on the Re field on the associated HUD-1 line and/or on the HUD-1 document. **For CDF orders**, when this option is checked, the money appears in the **Borrower-Paid Before Closing** or **Seller-Paid Before Closing** fields on the associated CDF line. There is also a separate POC checkbox which allows for showing the Seller's non-prorated personal tax as Paid Outside of Closing.

County Taxes

Tax Status and Dates

County taxes or other purpose: Enter a description of the taxes. The default for this field is **County Taxes**. This field will print on the CDF/HUD-1 Settlement Statement in the line designated in Show tax figures on CDF/HUD-1 and/or CDF/Escrow HUD-1 line. **Note:** The County taxes or other purpose field is disabled unless the appropriate CDF or HUD Edit permission is granted in SPAdmin. The laws outlined in CDF and HUD regulations apply to manual entries made here.

Tax payment status: Select one of the following options from the drop-down list. Your choice will affect the way taxes are prorated between the buyer/borrower and seller. If taxes are being paid at closing, a disbursement will be created. **Note:** If the property is not subject to county taxes, do not enter a status.

- Watch a video walk-through on [using prorations »](#)

Option	Description
Unpaid - Credit Buyer	The buyer/borrower is responsible for paying current period taxes later in the tax period.
	For CDF orders, The seller's portion of the taxes will be shown on Pg 3, lines L.13 & N.15.
	For HUD-1 orders, the seller's portion of the taxes will be shown on lines 211 & 511.
Paid - Credit Seller	The seller is to pay (or has already paid) current period taxes.
	For CDF orders, the buyer/borrower's portion of the taxes will be shown on Pg 3 lines K.09 & M.10.
	For HUD-1 Orders, the buyer/borrower's portion of the taxes will be shown on 107 & 407.
No Proration - Escrow Only	No proration of taxes will be done at closing and the following fields will be disabled: Current tax period proration date, Seller's portion is, days of, Show tax figures on HUD-1, HUD-1 Figures , and Tax Prorations (CDF).
	HUD-1 orders: City/Town, County, & Assessment taxes will be escrowed and the escrowed amount will show on line 1004; it can be manually changed to another escrow line.
	CDF orders: City/Town, County, & Assessment taxes will be escrowed and the escrowed amount will show on Pg 2, line G.03; it can be manually changed to another escrow line.
Pay Total Tax	The total tax amount will be paid to the taxing authority at closing.
	HUD-1 orders: By default, the buyer's and seller's portions will not be sent to a HUD-1 line until a 1300 line is selected in the Show tax figures on HUD-1 drop-down.
	CDF orders: The drop-down default to F.04 but can be changed to any Section F. line.
Pay Seller's Portion	Only the seller's portion of taxes will be paid to the taxing authority at closing.
	HUD-1 orders: By default, the seller's portion will show on 510 (City/Town Taxes), 511 (County Taxes), and 512 (Assessments). However, this default can be changed for a selection available in the Show tax figures on HUD-1 drop-down.
	CDF orders: the 3 tax screens default to F.04, but can be changed to any Section F. line.
Pay Buyer's Portion	Only the buyer/borrower's portion of taxes will be paid to the taxing authority at closing.
	HUD-1 orders: By default, the buyer's portions will not be sent to a HUD-1 line until a 1300 line is selected in the Show tax figures on HUD-1 drop-down.
	CDF orders: the 3 tax screens default to F.04, but can be changed to any Section F. line

County taxes lookup code: Enter a lookup code to retrieve tax information from the Lookup table or press **F9** to select from the Lookup table. See Lookup Tables for more information about storing and reusing information.

Current tax period from: Enter the beginning and ending dates for the current tax period. Taxes will be calculated based on the number of days into the current tax period and the Current tax period proration date. Other variables that affect the calculation include: Use **30-day months** and **Charge buyer for Proration Date in all Prorations** on the Order Information screen. Note: Do not use the city and county tax or assessments screens for past due taxes. Instead, use **Debit Lines** in the following sections of a HUD-1 order, as past due taxes are considered another bill owed by the seller(s): 1300 and 500. **For CDF orders**, use Page 2 Section H. and Page 3 Section N.

On the **Properties** screen in SPAdmin under Profile Management, use the **To** instead of **Through** for prorations preference to default the **Through** to **To** label for tax periods and proration periods. This option will change **Through** to **To** on the **Current tax period**, all selected **HUD-1 lines**, and the **HUD-1 Figures** sections of the tax screens.

Note: For the **City/Town, County**, and **Assessment** screens, when the defaulted reserved HUD-1 line is used in the **Show Tax Figures on HUD-1** drop-down, the **HUD-1 Figures** section must use **To** regardless of the preference per RESPA regulations.

Current tax period proration date: Defaults from the Proration date on the Order Information screen, however, it can be overwritten. Taxes will be calculated based on the number of days into the current tax period and the Current tax period proration date.

Use short proration start date of: Select this option to allow proration of taxes to begin at a date different than the Current tax period proration date. This option is provided primarily for Ohio. The checkbox and the date will be visible only if the **Short Proration** option is checked within the user's profile in **SPAdmin**. If a Current tax period proration date is not entered, the Use short proration start date of will be blank. Once a Current tax period proration date is entered, if it is less than 07/01, then 01/01 will default in this field. If greater than or equal to 07/01, then 07/01 will default in this field. The date can be overwritten.

Seller's portion is: The first field is the amount of days out of the current tax period for which the seller is responsible. The second field is the amount of days in the current tax period. These fields will default when the Current tax period and the Current tax period proration date contain data.

Note: This field will be filled in by default with a number based on the **Current tax period proration date**. You can overwrite the defaulted entry if the seller's portion is to be based on a different number.

To have the buyer/borrower charged for the day of closing in fee prorations, select the **Charge buyer for proration date** option on the **Order Information** screen.

Use 30-day months: Select this option to base the prorating of this item on a 360-day year. When selected, ProForm will calculate the number of days the buyer or seller is responsible for using 30 day months.

Show tax figures on CDF/HUD-1:

CDF:

- **No Proration – Escrow Only:** With this default option, taxes will appear on CDF Page 2 Section G.
- **Unpaid – Credit Buyer/Paid – Credit Seller:** the field is dimmed (unavailable) and defaults the CDF reserved line for taxes.
- **Pay Total Tax/Pay Seller's Portion/Pay Buyer's Portion:** the field will be enabled and default to the CDF reserved line for taxes; an alternate CDF line can be selected.

HUD-1:

- **No Proration – Escrow Only:** With this default option, taxes will appear on Escrows (1000) section.
- **Unpaid – Credit Buyer/Paid – Credit Seller:** the field is dimmed (unavailable) and defaults the HUD-1 reserved lines for taxes.
- **Pay Total Tax/Pay Buyer’s Portion:** the default is blank; a line must be chosen.
- **Pay Seller’s Portion:** the field will be enabled and default to the reserved line for taxes; an alternate line can be selected.

Show tax figures as POC: Select this option to have all tax figures shown as Paid Outside of Closing (POC) on the HUD-1 Settlement Statement. A POC notation will be made on the Re field on the associated HUD-1 line and/or on the HUD-1 document. **For CDF orders,** when this option is checked, the money appears in the **Borrower-Paid Before Closing** or **Seller-Paid Before Closing** fields on the associated CDF line. There is also a separate POC checkbox which allows for showing the Seller’s non-prorated personal tax as Paid Outside of Closing.

Tax Amounts

The tax amounts section contains tax amount information.

Field	Description
Tax computation method	Select one of the following options from the drop-down list. None: Taxes will be based on manually entered amounts. If there is data under Rates and Values it will be ignored. Rates and Values: Taxes will be based on data entered under the Rates and Values button.
Rates & Values button	Displays the County Rates and Values dialog. Tax rate is per: Enter the increments in which the tax rate is to be applied. The default for this field is 100. Note: When manually entering an amount you do not need to include a dollar sign (\$). Round tax value up before using rate: Select to have tax values rounded up before the rate structure is applied. Base tax rate: Enter the base tax rate for the applicable jurisdiction. Note: The base tax rate entered must match the tax period. For example, if the tax period is quarterly, the base tax rate must also be quarterly. Plus additional rate: Enter the amount of any additional tax rate. For example, if there is an add-on school tax of \$.10 per \$100 to be applied in addition to the tax being entered here, enter .10 in this field. For: Enter a description of any tax rate entered in the Plus additional rate field. Escrow tax rate: Enter the escrow tax rate. This rate is used in the calculation of the amount to escrow the buyer/ borrower. Note: The default for this field is the amount in the Base tax rate field. Sales price X: Enter the percentage of the sales price (in decimal equivalent) that you want to use to calculate the real property value. For example, if the Real property tax value is to be equal to eighty-five percent of the sales price, enter .85 in this field. Real property tax value: Enter the real property tax value. Note: You can have this amount calculated automatically. Enter a percentage of the sales price you want to use

to calculate the real property tax value in the **Sales price X** field.

Sales price X: Enter the percentage of the sales price in decimal equivalent that you want to use to calculate the escrow tax value. For example, if the **Escrow tax value** is to be equal to eighty-five percent of the sales price, enter .85 in this field.

Personal property tax value: Enter the seller's personal property tax value, if subject to city/town taxes. This amount will be used to charge the seller and credit the buyer on the HUD-1 line selected in the Seller's personal HUD-1 line. **Note:** You can also use this field for late fees, an additional personal tax, or any portion of the tax bill which is to be paid solely by the seller instead of being prorated.

Escrow tax value: Enter the escrow tax value of the property. **Note:** The default for this field is the amount in the **Real property tax value** field plus any amount in the **Personal property tax** field. You can have this amount calculated automatically. Enter a percentage of the sales price you want to use to calculate the escrow tax value in the **Sales price X** field.

Real property tax

Enter the amount of real property tax. The amount entered should correspond to the dates entered in the **Current tax period from** and **To** fields.

Note: This field can be calculated automatically using the **Base tax rate** and **Real property tax value** fields on the **County Rates and Values** dialog. Click the **Rates & Values** button to access this dialog.

Additional: Enter any additional real property tax amount to be paid (such as deferred taxes). The amount entered here will be prorated between the buyer/borrower and seller.

For: Enter a brief description of the purpose for any amount entered in the **Additional** field.

Seller's non-prorated personal tax

Enter the seller's total personal tax amount. This amount will not be included in the proration of taxes. It should include any amounts for which the seller alone is 100% responsible. In addition to the total personal tax amount, include any late payment amounts, past due amounts, late fees, or any amount for which the borrower should not be held liable.

Additional: Enter any additional seller's personal or non-prorated amount. This amount will be added to the amount entered in the **Seller's personal tax** field and the sum will be included in the total tax amount.

For: Enter a brief description of the purpose for any amount entered in the **Additional** field.

HUD-1 line: Select the HUD-1 line in which the seller's personal tax should appear.

POC: Selecting this checkbox will **not** cause the real property taxes to show as POC:

CDF: will show the seller's personal tax figures in the Borrower-Paid Before Closing or Seller-Paid Before Closing fields on the associated CDF line.

HUD-1: will show the seller's personal tax figures as Paid Outside of Closing (POC) on the HUD-1 Settlement Statement. A POC notation will be made on the Re field on the associated HUD-1 line and/or on the HUD-1 document.

Total tax

Enter the total tax amount.

Prepaid tax	<p>Note: The default for this field is the sum of the amounts entered in the Real property tax, Additional, Seller's non-prorated tax, and Additional fields.</p> <p>Enter any amount of taxes prepaid by the seller. This field is only available when Unpaid – Credit Buyer is selected from the Tax payment status drop-down.</p> <p>Note: This amount will be included in the total buyer's part of real estate taxes to be reimbursed to the seller(s) on the Division of Proceeds & 1099-S Data screen.</p>
Escrow to be based on	<p>This is a read-only field which defaults the Total Tax amount.</p> <p>Note: When using Rates and Values, Escrow to be based on does not equal Total tax. It equals the calculation for escrow that is performed on the Rates and Value dialog box.</p> <p>Additional: Enter any additional escrow amount. This amount will be added to the Total Tax to calculate the Escrow Total field.</p> <p>For: Enter a brief description of the purpose for the amount entered in the Additional field.</p>
Escrow Total	Total of Escrow to be based on + Additional escrow.
Months	Entering data in this field will calculate tax escrow on the 1000 section lines (for HUD orders) and the G. section lines (for CDF orders), as long as the Escrow Total field is populated.
Escrow CDF/HUD-1 Line	<p>For HUD-1 orders, this drop-down will default to line 1004 for tax escrows.</p> <p>For CDF orders, it will default to G.03 for the same screens.</p>

Taxing Authority/Disbursement

Field	Description
Taxing authority	Select or add a new order contact as the taxing authority. The order contact selected will be the payee on the HUD-1 line selected in Show tax figures on HUD-1 when paying taxes and Seller's personal tax .

HUD-1 Figures/Tax Prorations

This section appears as **HUD-1 Figures** for a **HUD order**, and **Tax Prorations** for a **CDF order**.

Field	Description												
Buyer credit for taxes	<p>The first row of the HUD-1 Figures/Tax Prorations section is to notate the HUD-1/CDF line, amount, and dates applicable to the buyer. The First label is dynamic based on the Tax payment status:</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Tax Payment Status</th> <th style="text-align: left;">Buyer Label Phrase</th> <th style="text-align: left;">Description</th> </tr> </thead> <tbody> <tr> <td>No proration-Escrow Only</td> <td>No buyer proration</td> <td>Disable dates and amounts fields</td> </tr> <tr> <td>Unpaid-Buyer Credit</td> <td>Buyer credit</td> <td></td> </tr> <tr> <td>Paid-Seller Credit</td> <td>Buyer debit</td> <td></td> </tr> </tbody> </table>	Tax Payment Status	Buyer Label Phrase	Description	No proration-Escrow Only	No buyer proration	Disable dates and amounts fields	Unpaid-Buyer Credit	Buyer credit		Paid-Seller Credit	Buyer debit	
Tax Payment Status	Buyer Label Phrase	Description											
No proration-Escrow Only	No buyer proration	Disable dates and amounts fields											
Unpaid-Buyer Credit	Buyer credit												
Paid-Seller Credit	Buyer debit												

Pay Total Tax	Buyer debit	
Pay Seller's Portion	No buyer proration	Disable the buyer debit line
Pay Buyer's Portion	Buyer debit	

If the Tax payment status is other than **No Proration-Escrow Only**, then the CDF/HUD-1 line selected in **Show tax figures on CDF/HUD-1** appears in parenthesis before the label. For example: (210) Buyer credit or (L.14) Buyer credit.

If a CDF/HUD line has not been selected in **Show tax figures on CDF/HUD-1**, the label will have dashes in the parenthesis instead. For example: (---) Buyer credit.

If the Buyer amount is not applicable, the Buyer line will be disabled.

Buyer tax period

To

The dates and amounts in the HUD-1 Page 1 Figures/Tax prorations section will be entered automatically depending on the Tax payment status, Current tax period from and through, Current tax period proration date, the number of days for which the seller is responsible (based on the Seller's Portion is and Days of fields), and the total real property tax amount to be prorated.

Seller debit for taxes

The second row of the HUD-1 Figures/Tax prorations section is to notate the CDF/HUD-1 line, amount, and dates applicable to the seller. The First label is dynamic based on the Tax payment status:

Tax Payment Status	Seller Label Phrase	Description
No Proration-Escrow Only	No seller proration	Disable dates and amounts fields
Unpaid-Buyer Credit	Seller debit	
Paid-Seller Credit	Seller credit	
Pay Total Tax	Seller debit	
Pay Seller's Portion	Seller debit	
Pay Buyer's Portion	No seller proration	

If a CDF/HUD line has not been selected in **Show tax figures on CDF/HUD-1**, the label will have dashes in the parenthesis instead. For example: (---) Seller credit.

If the Seller amount is not applicable, the Seller line will be disabled.

Seller tax period

The dates and amounts in the HUD-1 Page 1 Figures/Tax prorations section will be entered automatically depending on the Tax payment status, Current tax period from

To and through, Current tax period proration date, the number of days for which the seller is responsible (based on the Seller's Portion is and Days of fields), and the total real property tax amount to be prorated.

Assessments

Tax Status and Dates

Assessments or other purpose: Enter a description of the taxes. The default for this field is **Assessments**. This field will print on the CDF/HUD-1 Settlement Statement in the line designated in Show tax figures on CDF/HUD-1 and/or Escrow CDF/HUD-1 line. The laws outlined in CDF and HUD regulations apply to manual entries made here

Note: The **Assessments or other purpose** field is disabled unless the CDF or HUD **Edit** permission is granted in SPAdmin.

Tax payment status

Select one of the following options from the drop-down list. Your choice will affect the way taxes are prorated between the buyer/borrower and seller. If taxes are being paid at closing, a disbursement will be created.

Note: If the property is not subject to assessment taxes, do not enter a status.

Option	Description
Unpaid - Credit Buyer	<p>The buyer/borrower is responsible for paying current period taxes later in the tax period.</p> <p>For CDF orders, The seller's portion of the taxes will be shown on Pg 3, lines L.14 & N.16.</p> <p>For HUD-1 orders, the seller's portion of the taxes will be shown on lines 212 & 512.</p>
Paid - Credit Seller	<p>The seller is to pay (or has already paid) current period taxes.</p> <p>For CDF orders, the buyer/borrower's portion of the taxes will be shown on Pg 3 lines K.10 & M.11.</p> <p>For HUD-1 Orders, the buyer/borrower's portion of the taxes will be shown on 108 & 408.</p>
No Proration - Escrow Only	<p>No proration of taxes will be done at closing and the following fields will be disabled: Current tax period proration date, Seller's portion is, days of, Show tax figures on HUD-1, HUD-1 Figures , and Tax Prorations (CDF).</p> <p>HUD-1 orders: City/Town, County, & Assessment taxes will be escrowed and the escrowed amount will show on line 1004; it can be manually changed to another escrow line.</p> <p>CDF orders: City/Town, County, & Assessment taxes will be escrowed and the</p>

	escrowed amount will show on Pg 2, line G.03; it can be manually changed to another escrow line.
Pay Total Tax	The total tax amount will be paid to the taxing authority at closing. HUD-1 orders: By default, the buyer's and seller's portions will not be sent to a HUD-1 line until a 1300 line is selected in the Show tax figures on HUD-1 drop-down.
Pay Seller's Portion	CDF orders: The drop-down default to F.04 but can be changed to any Section F. line. Only the seller's portion of taxes will be paid to the taxing authority at closing. HUD-1 orders: By default, the seller's portion will show on 510 (City/Town Taxes), 511 (County Taxes), and 512 (Assessments). However, this default can be changed for a selection available in the Show tax figures on HUD-1 drop-down.
Pay Buyer's Portion	CDF orders: the 3 tax screens default to F.04, but can be changed to any Section F. line. Only the buyer/borrower's portion of taxes will be paid to the taxing authority at closing. HUD-1 orders: By default, the buyer's portions will not be sent to a HUD-1 line until a 1300 line is selected in the Show tax figures on HUD-1 drop-down. CDF orders: the 3 tax screens default to F.04, but can be changed to any Section F. line

Assessments lookup code: Enter a lookup code to retrieve tax information from the Lookup table or press **F9** to select from the Lookup table. See Lookup Tables for more information about storing and reusing information.

Current tax period from: Enter the beginning and ending dates for the current tax period. Taxes will be calculated based on the number of days into the current tax period and the Current tax period proration date. Other variables that affect the calculation include: Use **30-day months** and **Charge buyer for Proration Date in all Prorations** on the Order Information screen. Note: Do not use the city and county tax or assessments screens for past due taxes. Instead, use **Debit Lines** in the following sections of a HUD-1 order, as past due taxes are considered another bill owed by the seller(s): 1300 and 500. **For CDF orders**, use Page 2 Section H. and Page 3 Section N.

Note: Do not use the city and county tax or assessments screens for past due taxes. Instead, use Debit Lines in the following sections as past due taxes are considered another bill owed by the seller(s) 1300 and 500.

On the **Properties** screen in SPAdmin under Profile Management, use the **To** instead of **Through** for prorations preference to default the **Though** to **To** label for tax periods and proration periods. This option will change **Through** to **To** on the **Current tax period**, all selected **HUD-1 lines**, and the **HUD-1 Figures** sections of the tax screens.

Note: For the **City/Town**, **County**, and **Assessment** screens, when the defaulted reserved HUD-1 line is used in the **Show Tax Figures on HUD-1** drop-down, the **HUD-1 Figures** section must use **To** regardless of the preference per RESPA regulations.

Current tax period proration date: Defaults from the **Proration date** on the **Order Information** screen, however, it can be overwritten. Taxes will be calculated based on the number of days into the current tax period and the Current tax period proration date.

Use short proration start date of: Select this option to allow proration of taxes to begin at a date different than the Current tax period proration date. This option is provided primarily for Ohio. The checkbox and the date will be visible only if the **Short Proration** option is checked within the user’s profile in **SPAdmin**. If a Current tax period proration date is not entered, the Use short proration start date of will be blank. Once a Current tax period proration date is entered, if it is less than 07/01, then 01/01 will default in this field. If greater than or equal to 07/01, then 07/01 will default in this field. The date can be overwritten.

Seller's portion is: The first field is the amount of days out of the current tax period for which the seller is responsible. The second field is the amount of days in the current tax period. These fields will default when the **Current tax period** and the **Current tax period proration date** contain data.

Note: This field will be filled in by default with a number based on the **Current tax period proration date**. You can overwrite the defaulted entry if the seller's portion is to be based on a different number.

To have the buyer/borrower charged for the day of closing in fee prorations, select the **Charge buyer for proration date** option on the **Order Information** screen.

Use 30-day months: Select this option to base the prorating of this item on a 360-day year. When selected, ProForm will calculate the number of days the buyer or seller is responsible for using 30 day months.

Show tax figures on CDF/HUD-1:

CDF:

- **No Proration – Escrow Only:** With this default option, taxes will appear on CDF Page 2 Section G.
- **Unpaid – Credit Buyer/Paid – Credit Seller:** the field is dimmed (unavailable) and defaults the CDF reserved line for taxes.
- **Pay Total Tax/Pay Seller’s Portion/Pay Buyer’s Portion:** the field will be enabled and default to the CDF reserved line for taxes; an alternate CDF line can be selected.

HUD-1:

- **No Proration – Escrow Only:** With this default option, taxes will appear on Escrows (1000) section.
- **Unpaid – Credit Buyer/Paid – Credit Seller:** the field is dimmed (unavailable) and defaults the HUD-1 reserved lines for taxes.
- **Pay Total Tax/Pay Buyer’s Portion:**the default is blank; a line must be chosen.
- **Pay Seller’s Portion:** the field will be enabled and default to the reserved line for taxes; an alternate line can be selected.

Show tax figures as POC: Select this option to have all tax figures shown as Paid Outside of Closing (POC) on the HUD-1 Settlement Statement. A POC notation will be made on the Re field on the associated HUD-1 line and/or on the HUD-1 document. **For CDF orders**, when this option is checked, the money appears in the **Borrower-Paid Before Closing** or **Seller-Paid Before Closing** fields on the associated CDF line. There is also a separate POC checkbox which allows for showing the Seller’s non-prorated personal tax as Paid Outside of Closing.

Tax Amounts

The tax amounts section contains tax amount information.

Field	Description
Tax computation method	Select one of the following options from the drop-down list. None: Taxes will be based on manually entered amounts. If there is data under Rates

and Values it will be ignored.

Rates and Values: Taxes will be based on data entered under the Rates and Values button.

Rates & Values button

Displays the Assessments Rates and Values dialog.

Tax rate is per: Enter the increments in which the tax rate is to be applied. The default for this field is 100. Note: When manually entering an amount you do not need to include a dollar sign (\$).

Round tax value up before using rate: Select to have tax values rounded up before the rate structure is applied.

Base tax rate: Enter the base tax rate for the applicable jurisdiction. Note: The base tax rate entered must match the tax period. For example, if the tax period is quarterly, the base tax rate must also be quarterly.

Plus additional rate: Enter the amount of any additional tax rate. For example, if there is an add-on school tax of \$.10 per \$100 to be applied in addition to the tax being entered, enter .10 in this field.

For: Enter a description of any tax rate entered in the Plus additional rate field.

Escrow tax rate: Enter the escrow tax rate. This rate is used in the calculation of the amount to escrow the buyer/ borrower. Note: The default for this field is the amount in the Base tax rate field.

Sales price X: Enter the percentage of the sales price (in decimal equivalent) that you want to use to calculate the real property value. For example, if the Real property tax value is to be equal to eighty-five percent of the sales price, enter .85 in this field.

Real property tax value: Enter the real property tax value. Note: You can have this amount calculated automatically. Enter a percentage of the sales price you want to use to calculate the real property tax value in the Sales price X field.

Sales price X: Enter the percentage of the sales price in decimal equivalent that you want to use to calculate the escrow tax value. For example, if the Escrow tax value is to be equal to eighty-five percent of the sales price, enter .85 in this field.

Personal property tax value: Enter the seller's personal property tax value, if subject to city/town taxes. This amount will be used to charge the seller and credit the buyer on the HUD-1 line selected in the Seller's personal HUD-1 line. Note: You can also use this field for late fees, an additional personal tax, or any portion of the tax bill which is to be paid solely by the seller instead of being prorated.

Escrow tax value: Enter the escrow tax value of the property. Note: The default for this field is the amount in the Real property tax value field plus any amount in the Personal property tax field. You can have this amount calculated automatically. Enter a percentage of the sales price you want to use to calculate the escrow tax value in the Sales price X field.

Real property tax

Enter the amount of real property tax. The amount entered should correspond to the dates entered in the Current tax period from and To fields.

Note: This field can be calculated automatically using the Base tax rate and Real property tax value fields on the Assessments Rates and Values dialog. Click the Rates &

	<p>Values button to access this dialog.</p> <p>Additional: Enter any additional real property tax amount to be paid (such as deferred taxes). The amount entered here will be prorated between the buyer/borrower and seller.</p> <p>For: Enter a brief description of the purpose for any amount entered in the Additional field.</p>
Seller's non-prorated personal tax	<p>Enter the seller's total personal tax amount. This amount will not be included in the proration of taxes. It should include any amounts for which the seller alone is 100% responsible. In addition to the total personal tax amount, include any late payment amounts, past due amounts, late fees, or any amount for which the borrower should not be held liable.</p> <p>Additional: Enter any additional seller's personal or non-prorated amount. This amount will be added to the amount entered in the Seller's personal tax field and the sum will be included in the total tax amount.</p> <p>For: Enter a brief description of the purpose for any amount entered in the Additional field.</p> <p>HUD-1 line: Select the HUD-1 line in which the seller's personal tax should appear.</p> <p>POC: Selecting this checkbox will not cause the real property taxes to show as POC:</p> <p>CDF: will show the seller's personal tax figures in the Borrower-Paid Before Closing or Seller-Paid Before Closing fields on the associated CDF line.</p> <p>HUD-1: will show the seller's personal tax figures as Paid Outside of Closing (POC) on the HUD-1 Settlement Statement. A POC notation will be made on the Re field on the associated HUD-1 line and/or on the HUD-1 document.</p>
Total tax	<p>Enter the total tax amount.</p> <p>Note: The default for this field is the sum of the amounts entered in the Real property tax, Additional, Seller's non-prorated tax, and Additional fields.</p>
Prepaid tax	<p>Enter any amount of taxes prepaid by the seller. This field is only available when Unpaid – Credit Buyer is selected from the Tax payment status drop-down.</p> <p>Note: This amount will be included in the total buyer's part of real estate taxes to be reimbursed to the seller(s) on the Division of Proceeds & 1099-S Data screen.</p>
Escrow to be based on	<p>This is a read-only field which defaults the Total Tax amount.</p> <p>Note: When using Rates and Values, Escrow to be based on does not equal Total tax. It equals the calculation for escrow that is performed on the Rates and Value dialog box.</p> <p>Additional: Enter any additional escrow amount. This amount will be added to the Total Tax to calculate the Escrow Total field.</p> <p>For: Enter a brief description of the purpose for the amount entered in the Additional field.</p>
Escrow Total Months	<p>Total of Escrow to be based on + Additional escrow.</p> <p>Entering data in this field will calculate tax escrow on the 1000 section lines (for HUD orders) and the G. section lines (for CDF orders), as long as the Escrow Total field is populated.</p>
Escrow CDF/HUD-1 Line	<p>For HUD-1 orders, this drop-down will default to line 1004 for tax escrows.</p>

For CDF orders, it will default to G.03 for the same screens.

Taxing Authority/Disbursement

Field	Description
Taxing authority	Select or add a new order contact as the taxing authority. The order contact selected will be the payee on the HUD-1 line selected in Show tax figures on HUD-1 when paying taxes and Seller's personal tax .

HUD-1 Figures/Tax Prorations

Field	Description
Buyer credit for taxes	The first row of the HUD-1 Figures/Tax Prorations section is to notate the HUD-1/CDF line, amount, and dates applicable to the buyer. The First label is dynamic based on the Tax payment status:

Tax Payment Status	Buyer Label Phrase	Description
No proration-Escrow Only	No buyer proration	Disable dates and amounts fields
Unpaid-Buyer Credit	Buyer credit	
Paid-Seller Credit	Buyer debit	
Pay Total Tax	Buyer debit	
Pay Seller's Portion	No buyer proration	Disable the buyer debit line
Pay Buyer's Portion	Buyer debit	

If the Tax payment status is other than **No Proration-Escrow Only**, then the CDF/HUD-1 line selected in **Show tax figures on HUD-1** appears in parenthesis before the label. For example: (210) Buyer credit or (L.14) Buyer credit.

If a CDF/HUD line has not been selected in **Show tax figures on CDF/HUD-1**, the label will have dashes in the parenthesis instead. For example: (---) Buyer credit.

If the Buyer amount is not applicable, the Buyer line will be disabled.

Buyer tax period	The dates and amounts in the HUD-1 Page 1 Figures section will be entered automatically depending on the Tax payment status, Current tax period from and through, Current tax period proration date, the number of days for which the seller is responsible (based on the Seller's Portion is and Days of fields), and the total real property tax amount to be prorated.
To	

Seller debit for taxes	The second row of the HUD-1 Figures section is to notate the HUD-1 line, amount, and dates applicable to the seller. The First label is dynamic based on the Tax payment status:
------------------------	--

Tax Payment Status	Seller Label Phrase	Description
No Proration-Escrow Only	No seller proration	Disable dates and amounts fields
Unpaid-Buyer Credit	Seller debit	

Paid-Seller Credit	Seller credit
Pay Total Tax	Seller debit
Pay Seller's Portion	Seller debit
Pay Buyer's Portion	No seller proration

If the Tax payment status is other than **No Proration-Escrow Only**, then the HUD-1 line selected in **Show tax figures on HUD-1** appears in (106) Seller credit.

If a HUD line has not been selected in **Show tax figures on HUD-1**, the label will have dashes in the parenthesis instead. For example: (---) Seller credit.

If the Seller amount is not applicable, the Seller line will be disabled.




Seller tax period To The dates and amounts in the HUD-1 Page 1 Figures section will be entered automatically depending on the Tax payment status, Current tax period from and through, Current tax period proration date, the number of days for which the seller is responsible (based on the Seller's Portion is and Days of fields), and the total real property tax amount to be prorated.

Additional Taxes

This section contains information for any additional taxes. The Additional Taxes screen is used if there are taxes to prorate or disburse other than City/Town, County, or Assessments. You can enter as many taxes as needed.

- Watch a video walk-through on [using prorations »](#)

Multiple Tax Grid

Click  to add a tax to the multiple tax grid. When data is entered into the fields below the grid, the information automatically updates. After entering the initial tax, additional taxes can be entered by clicking . Continue this process until all additional taxes have been entered. To delete a tax from the order, highlight the tax to be deleted and click . **Note:** Right-click anywhere in the grid to add or delete a tax.

Tax Status and Dates

Field	Description
Additional taxes or other purpose	Enter a description of the taxes. This field will print on the HUD-1 settlement statement in the line designated in Show tax figures on HUD-1 and/or Escrow HUD-1 line. Note: The laws outlined in CDF and HUD regulations apply to manual entries made here.
Tax payment status	Select one of the following options from the drop-down list. Your choice will affect the way taxes are prorated between the buyer/borrower and seller. If taxes are being paid at closing, a disbursement will be created. Note: If the property is not

subject to taxes, do not enter a status.

Unpaid - Credit Buyer: The buyer/borrower is responsible for paying current period taxes later in the tax period.

Paid - Credit Seller: The seller is to pay (or has already paid) current period taxes. The seller's portion of the taxes will be shown on the line selected from the Show tax figures on Hud-1 drop-down.

No Proration - Escrow Only: No proration of taxes will be done at closing. Taxes will be escrowed and the escrowed amount will be shown on the line selected from the Escrow HUD-1 line drop-down. The following lines will be disabled: Current tax period proration date, Seller's portion is, days of, Show tax figures on HUD-1, and the HUD-1 Figures section.

Pay total tax: The total tax amount will be paid at closing. By default, the buyer's and seller's portions will not be sent to a HUD-1 line until a 1300 line is selected in the Show tax figures on HUD-1 drop-down.

Pay Seller's Portion: Only the seller's portion of taxes will be paid to the taxing authority at closing. By default, the seller's portion will not be sent to a HUD-1 line until a 1300 line is selected in the Show tax figures on HUD-1 drop-down.

Pay buyer's portion: Only the buyer/borrower's portion of taxes will be paid to the taxing authority at closing. By default, the buyer's portion will not be sent to a HUD-1 line until a 1300 line is selected in the Show tax figures on HUD-1 drop-down.

Additional taxes lookup code	Enter a lookup code to retrieve tax information from the Lookup table or press F9 to select from the Lookup table. See Lookup Tables for more information about storing and reusing information.
Current tax period from	Enter the dates that begin and end the current tax period. These dates should be in month/day format. Taxes will be calculated based on the number of days into the current tax period at settlement. Note: The proration date must fall between the dates entered into the Current Tax Period from and Through fields.
Current tax period proration date	Defaults from the Proration date on the Order Information screen, however, it can be overwritten. Taxes will be calculated based on the number of days into the current tax period and the Current tax period proration date.
Use short proration start date of	Select this option to allow proration of taxes to begin at a date different than the Current tax period proration date. This is used by customers primarily in Ohio. The checkbox and the date will be visible only if the Short Proration option is checked on the Profile Management screen in SPAdmin. If a Current tax period proration date is not entered, the Use short proration start date of will be blank. Once a Current tax period proration date is entered, if it is less than 07/01, then 01/01 will default in this field. If greater than or equal to 07/01, then 07/01 will default in this field. The date can be overwritten.
Seller's portion is	The first field is the amount of days out of the current tax period for which the seller is responsible. The second field is the amount of days in the current tax

period. These fields will default when the Current tax period and the Current tax period proration date contain data.

Note: This field will be filled in by default with a number based on the Current tax period proration date. You can overwrite the defaulted entry if the seller's portion is to be based on a different number.

To have the buyer/borrower charged for the day of closing in fee prorations, select the Charge buyer for proration date option on the Order Information screen.

Use 30-day months

Select this option to base the prorating of this item on a 360-day year. When selected, ProForm will calculate the number of days the buyer or seller is responsible for using 30 day months.

Show tax figures on CDF/HUD-1

Select where you want tax amounts shown on the CDF or HUD-1 settlement statement. For CDF orders, the Status options **Pay Total Tax**, **Pay Seller's Portion**, and **Pay Buyer's Portion** will default to line F.04.

CDF:

- **No Proration – Escrow Only:** With this default option, taxes will appear on CDF Page 2 Section G.
- **Pay Total Tax/Pay Seller's Portion/Pay Buyer's Portion:** the field will be enabled and default to the CDF reserved line for taxes on the City/Town Taxes, County Taxes, and Assessments screens but an alternate CDF line can be selected.
- **Unpaid – Credit Buyer/Paid – Credit Seller:** the default is blank and a CDF line must be chosen.

HUD-1:

- For Additional Taxes, the field will always default blank for all of the Status options. A HUD-1 line will have to be selected in order for the taxes to show on the HUD-1 Settlement Statement.

Show tax figures as POC

Select this option to have all tax figures shown as Paid Outside of Closing (POC) on the HUD-1 settlement statement. A POC notation will be made on the **Re** field on the associated HUD-1 line and/or on the HUD-1 document.

Tax Amounts

Field	Description
Tax computation method	Select one of the following options from the drop-down list. None: Taxes will be based on manually entered amounts. If there is data under Rates and Values it will be ignored. Rates and Values: Taxes will be based on data entered under the Rates and Values button.
Rates & Values button	Displays the Additional Rates and Values dialog. Tax rate is per: Enter the increments in which the tax rate is to be applied. The default

for this field is 100. Note: When manually entering an amount you do not need to include a dollar sign (\$).

Round tax value up before using rate: Select to have tax values rounded up before the rate structure is applied.

Base tax rate: Enter the base tax rate for the applicable jurisdiction. Note: The base tax rate entered must match the tax period. For example, if the tax period is quarterly, the base tax rate must also be quarterly.

Plus additional rate: Enter the amount of any additional tax rate. For example, if there is an add-on school tax of \$.10 per \$100 to be applied in addition to the tax being entered, enter .10 here.

For: Enter a description of any tax rate entered in the Plus additional rate field.

Escrow tax rate: Enter the escrow tax rate. This rate is used in the calculation of the amount to escrow the buyer/ borrower. Note: The default for this field is the amount in the Base tax rate field.

Sales price X: Enter the percentage of the sales price (in decimal equivalent) that you want to use to calculate the real property value. For example, if the Real property tax value is to be equal to eighty-five percent of the sales price, enter .85 in this field.

Real property tax value: Enter the real property tax value. Note: You can have this amount calculated automatically. Enter a percentage of the sales price you want to use to calculate the real property tax value in the Sales price X field.

Sales price X: Enter the percentage of the sales price in decimal equivalent that you want to use to calculate the escrow tax value. For example, if the Escrow tax value is to be equal to eighty-five percent of the sales price, enter .85 in this field.

Personal property tax value: Enter the seller's personal property tax value, if subject to city/town taxes. This amount will be used to charge the seller and credit the buyer on the HUD-1 line selected in the Seller's personal HUD-1 line. Note: You can also use this field for late fees, an additional personal tax, or any portion of the tax bill which is to be paid solely by the seller instead of being prorated.

Escrow tax value: Enter the escrow tax value of the property. Note: The default for this field is the amount in the Real property tax value field plus any amount in the Personal property tax field. You can have this amount calculated automatically. Enter a percentage of the sales price you want to use to calculate the escrow tax value in the Sales price X field.

Real property tax

Enter the amount of real property tax. The amount entered should correspond to the dates entered in the Current tax period from and To fields.

Note: This field can be calculated automatically using the Base tax rate and Real property tax value fields on the Additional Rates and Values dialog. Click the Rates & Values button to access this dialog.

Additional: Enter any additional real property tax amount to be paid (such as deferred taxes). The amount entered here will be prorated between the buyer/borrower and seller.

For: Enter a brief description of the purpose for any amount entered in the Additional

Seller's non-prorated personal tax	<p>field.</p> <p>Enter the seller's total personal tax amount. This amount will not be included in the proration of taxes. It should include any amounts for which the seller alone is 100% responsible. In addition to the total personal tax amount, include any late payment amounts, past due amounts, late fees, or any amount for which the borrower should not be held liable.</p> <p>Additional: Enter any additional seller's personal or non-prorated amount. This amount will be added to the amount entered in the Seller's personal tax field and the sum will be included in the total tax amount.</p> <p>For: Enter a brief description of the purpose for any amount entered in the Additional field.</p> <p>CDF/HUD-1 line: Select the CDF or HUD-1 line in which the seller's personal tax should appear.</p> <p>POC: Selecting this checkbox will not cause the real property taxes to show as POC:</p> <ul style="list-style-type: none"> • CDF: will show the seller's personal tax figures in the Borrower-Paid Before Closing or Seller-Paid Before Closing fields on the associated CDF line. • HUD-1: will show the seller's personal tax figures as Paid Outside of Closing (POC) on the HUD-1 Settlement Statement. A POC notation will be made on the Re field on the associated HUD-1 line and/or on the HUD-1 document.
Total tax	<p>Enter the total tax amount.</p> <p>Note: The default for this field is the sum of the amounts entered in the Real property tax, Additional, Seller's non-prorated tax, and Additional fields.</p>
Prepaid tax	<p>Enter any amount of taxes prepaid by the seller. This field is only available when Unpaid – Credit Buyer is selected from the Tax payment status drop-down.</p> <p>Note: This amount will be included in the total buyer's part of real estate taxes to be reimbursed to the seller(s) on the Division of Proceeds & 1099-S Data screen.</p>
Escrow to be based on	<p>This is a read-only field which defaults the Total Tax amount.</p> <p>Note: When using Rates and Values, Escrow to be based on does not equal Total tax. It equals the calculation for escrow that is performed on the Rates and Value dialog box.</p> <p>Additional: Enter any additional escrow amount. This amount will be added to the Total Tax to calculate the Escrow Total field.</p> <p>For: Enter a brief description of the purpose for the amount entered in the Additional field.</p>
Escrow Total Months	<p>Total of Escrow to be based on + Additional escrow.</p> <p>Entering data in this field will calculate tax escrow on the 1000 section lines (for HUD orders) and the G. section lines (for CDF orders), as long as the Escrow Total field is populated.</p>
Escrow CDF/HUD-1 Line	<p>For HUD-1 orders, this drop-down will default to line 1004 for tax escrows.</p> <p>For CDF orders, it will default to G.03 for the same screens.</p>

Taxing Authority/Disbursement

Field	Description
Taxing authority	Select or add a new order contact as the taxing authority. The order contact selected will be the payee on the HUD-1 line selected in Show tax figures on HUD-1 when paying taxes and Seller's personal tax .

HUD-1 Figures/Tax Prorations

Field	Description																					
Buyer credit for taxes	<p>The first row of the HUD-1 Figures/Tax Prorations section is to notate the HUD-1/CDF line, amount, and dates applicable to the buyer. The First label is dynamic based on the Tax payment status:</p> <table border="1"> <thead> <tr> <th>Tax Payment Status</th> <th>Buyer Label Phrase</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>No proration-Escrow Only</td> <td>No buyer proration</td> <td>Disable dates and amounts fields</td> </tr> <tr> <td>Unpaid-Buyer Credit</td> <td>Buyer credit</td> <td></td> </tr> <tr> <td>Paid-Seller Credit</td> <td>Buyer debit</td> <td></td> </tr> <tr> <td>Pay Total Tax</td> <td>Buyer debit</td> <td></td> </tr> <tr> <td>Pay Seller's Portion</td> <td>No buyer proration</td> <td>Disable the buyer debit line</td> </tr> <tr> <td>Pay Buyer's Portion</td> <td>Buyer debit</td> <td></td> </tr> </tbody> </table> <p>If the Tax payment status is other than No Proration-Escrow Only, then the CDF/HUD-1 line selected in Show tax figures on HUD-1 appears in parenthesis before the label. For example: (210) Buyer credit or (L.14) Buyer credit.</p> <p>If a CDF/HUD line has not been selected in Show tax figures on CDF/HUD-1, the label will have dashes in the parenthesis instead. For example: (---) Buyer credit.</p> <p>If the Buyer amount is not applicable, the Buyer line will be disabled.</p>	Tax Payment Status	Buyer Label Phrase	Description	No proration-Escrow Only	No buyer proration	Disable dates and amounts fields	Unpaid-Buyer Credit	Buyer credit		Paid-Seller Credit	Buyer debit		Pay Total Tax	Buyer debit		Pay Seller's Portion	No buyer proration	Disable the buyer debit line	Pay Buyer's Portion	Buyer debit	
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Buyer tax period To	<p>The dates and amounts in the HUD-1 Page 1 Figures section will be entered automatically depending on the Tax payment status, Current tax period from and through, Current tax period proration date, the number of days for which the seller is responsible (based on the Seller's Portion is and Days of fields), and the total real property tax amount to be prorated.</p>																					
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debit

Paid-Seller Credit Seller credit

Pay Total Tax Seller debit

Pay Seller's Portion Seller debit

Pay Buyer's Portion No seller proration

If the Tax payment status is other than **No Proration-Escrow Only**, then the HUD-1 line selected in **Show tax figures on HUD-1** appears in (106) Seller credit.

If a HUD line has not been selected in **Show tax figures on HUD-1**, the label will have dashes in the parenthesis instead. For example: (---) Seller credit.

If the Seller amount is not applicable, the Seller line will be disabled.

Seller tax period

To

The dates and amounts in the HUD-1 Page 1 Figures section will be entered automatically depending on the Tax payment status, Current tax period from and through, Current tax period proration date, the number of days for which the seller is responsible (based on the Seller's Portion is and Days of fields), and the total real property tax amount to be prorated.

Express HUD, Page 1

In previous versions of ProForm, the Express HUD section was primarily for the West Coast United States. Starting with SoftPro Select, the **Express HUD, Page 1** screen is page 1 of the HUD-1 Settlement Statement. Use this screen for fast and easy data entry.

For example, clicking on the Contract Sales Price hot spot automatically opens the Sales Contract and Earnest Money screen where the sales price is entered.

HUD-1: 1 Loan 1

100. GROSS AMOUNT DUE FROM BORROWER

101	Contract Sales Price	\$125,000.00
102	Personal Property	\$125.00
103	Settlement Charges to Borrower (Line 1400)	\$1,500.00
104		To: / /
105		To: / /

Adjustments For Items Paid By Seller In Advance

Sales Contract

Sales price: \$125,000.00

Seller financing: / /

Contract date: / /

Contract expires: / /

Express HUD, Page 2

In previous versions of ProForm, the Express HUD section was primarily for the West Coast. Use this screen for fast and easy data entry.

For example, clicking on the hot spot assigned to 803 will automatically open the screen where data may be entered in ProForm for line 803.

800. ITEMS PAYABLE IN CONNECTION WITH LOAN

801 Loan Origination Fee % To: ▼

802 Loan Discount % To: ▼

803 Appraisal Fee To: ▼

800. ITEMS PAYABLE IN CONNECTION WITH LOAN

HUD-1: Loan 1

Line	Description	Re
801	Loan Origination Fee	
802	Loan Discount	
803	Appraisal Fee	

Express HUD-1, Page 3

Comparison of GFE and HUD-1 Charges

The Comparison of GFE and HUD-1 Charges section contains HUD-1 lines to assist you in producing the top portion of the 2009 HUD-1, Page 3. The fields are activated when the **Use 2009 RESPA regulations for HUD-1 & HUD-1A** option is checked on The HUD-1 Options Screen. As HUD-1 lines are added or data is edited, the comparison grid data will update. Once data is overwritten on the comparison grid, automatic updates will no longer occur, and these edits will not be reflected on the HUD-1 line. The majority of the fields on Page 3 will not write back to the Loan or HUD-1 Section fields; any modifications made to Page 3 will only apply to the Page 3 of the HUD-1 Settlement Statement.

HUD-1: Loan 1

Comparison of GFE and HUD-1 Charges

HUD-1 Line	Description	GFE Type	GFE Amount	HUD-1 Amount
▶ 801	Our origination charge	Cannot increase		
802	Your credit or charge (points) for the specific inter...	Cannot increase		
803	Your adjusted origination charges	Cannot increase		
901	Daily interest charges	Can change		
903	Homeowner's insurance	Can change		
1001	Initial deposit for your escrow account	Can change		
1201	Government recording charges	Can increase up to 10%		
1203	Transfer taxes	Cannot increase		

Total charges that can increase up to 10% GFE Amount: \$ HUD-1 Amount: \$

Increase between GFE and HUD-1 charges: \$ or %

Total Charges That Can Increase More Than 10%

The fields in this section are calculated fields that add up all of the GFE and HUD-1 Amounts whose type is **Can Increase Up to 10%**.

Increase Between GFE and HUD-1 Changes

The fields in this section are calculated fields that display the amount/percentage of the difference between **GFE Amount & HUD-1 Amount**.

Loan Terms

The Loan Terms section contains fields to assist user in producing the bottom portion of the new 2009 HUD-1 Page 3:

Your initial loan amount is:	Enter the loan amount. If the loan amount was previously entered in the Loan Information & Funding screen in the Loan SoftPro Screens section, it will pre-fill on this line.
Your loan term is:	Enter the loan term in years. The default for this field is a calculation based on the Loan Terms & Payments screen Payments Per Year and the Total Payments fields.
Your initial interest rate is:	Enter the interest rate. If the interest rate has been entered in the Loan Terms & Payments screen in the Loan SoftPro Screens, it will pre-fill on this line.
Your initial monthly amount owed for principal, interest, and any mortgage insurance is:	<p>\$: This amount field defaults from the sum of Payment Information Letter payment amount fields of the Loan Terms & Payments screen. Select Principal or Interest as they apply to the payment.</p> <p>Mortgage Insurance: If applicable, select this option if the mortgage insurance is added to the principal and interest number entered in the dollar amount field. Or, the Mortgage Insurance check box becomes automatically selected when an amount has been entered on Line 902 of the Prepaid Loan Charges screen on the HUD-1 & Closing tab.</p>
Can your interest rate rise?:	By default, No is selected and the additional fields are greyed out. Once Yes is selected, information can be entered into this section. Information in this section can be entered manually or will pre-fill from the information entered on the Adjustable Rate Mortgage (ARM) Data screen which is accessible by clicking in the ARM Data button on the Loan Terms & Payments screen in the Loan SoftPro Screens.
Even if you make payments on time, can your loan balance rise?:	The default for this field is Yes when an amount is entered in the Loan Terms & Payments screen Maximum Loan Balance field. Once Yes is populated, the dollar amount can be manually overwritten, if applicable. If no amount has been previously entered in the Maximum Loan Balance field, the default will be No.
Even if you make a payment on time, can your monthly amount owed for principal, interest, and mortgage insurance rise?:	<p>By default, No is selected and the additional fields are greyed out. Once Yes is selected, information can be entered into this section.</p> <p>The first increase can be on: This information can be entered manually or will pre-fill from the information entered in the Adjustable Rate Mortgage (ARM) Data screen which is accessible by clicking on the ARM Data button on the Loan Terms & Payments screen in the Loan SoftPro Screens.</p> <p>And the monthly amount owed can rise to \$: This field defaults from the Adjustable Rate Mortgage (ARM) Data screens First Payment Charge Amount field.</p> <p>The Maximum it can ever rise to is \$: This field defaults from the Adjustable Rate Mortgage (ARM) Data screens Maximum Payment Amount field.</p>
Does your loan have a prepayment penalty?:	By default, Yes is selected when the Loan Terms & Payments screen Prepayment Penalty field is checked. The Amount defaults from the Maximum Prepayment Amount field. Once Yes is selected, the dollar amount can be manually entered, if applicable. The selection will default to No if the Prepayment Penalty check box is left unchecked.

Does your loan have a balloon payment?:	By default, No is selected and the amount field is greyed out. Once Yes is selected, if the balloon information is entered in the Loan Terms section of the Loan Terms & Payments screen it will change from No to Yes. If no information has been entered into the Loan Terms section, the data can be manually entered.
Total monthly amount owed including escrow payments:	The selection for this section defaults based upon the Payment Information Letter data on the Loan Payments and Terms screen. If escrows have been entered in the 1000 section of the HUD-1, the amounts will flow to the Payment Information Letter grid and will default to the You have an additional monthly escrow payment of... selection. The additional monthly escrow payment amount defaults from the Total Additional Escrows field on the Payment Information Letter screen. The initial monthly payment amount owed field defaults from the Principal Interest and Mortgage Insurance amount field on the Payment Information Letter screen.

Commissions (700)

This section contains information for the 700 section of the HUD.

Commission Save Validation

A warning, "**Total commission on line 700 does not equal the sum of commissions entered on lines 701 and 702**", indicates when lines 701 and 702 do not equal the total commission on line 700 when you try to save an order.

HUD-1

Defaults to **1** for the first HUD. If multiple HUDs have been added to the order, this drop-down is used to switch between HUDs.

700 Section

The 700 section contains commission information.

Field	Description
Total Commission Rate	Enter the total commission rate. For example, 6%. Note: A number greater than 50 will return a validation error.
Price	Enter the amount on which the total commission is to be based. Note: This field will automatically display the sales price from the Sales Contract screen in the General section.
Total Commission	Enter the total amount of commission. Note: This field defaults to the total commission dollar amount from the Total Commission Rate and Price fields.
MLS fee	Enter the MLS fee as a percentage. The Total MLS field will calculate this percentage and display the dollar amount. Note: Entering the percentage in this field is not required. Alternatively, a straight fee amount can be entered in the Total MLS field.
Total MLS	Enter a straight fee amount.
Include MLS Fee on Lines 701 & 702	Select this check box to include the MLS fee on the 701 and 702 sections of the HUD. By default, this fee will be reported on the disbursements summary and on checks, but NOT on the HUD-1 settlement statement.

Charge MLS To Select the broker responsible for the MLS fee. The default is **Selling Broker (702)**.

701 Section

The 701 section contains the listing agent commission information.

Field	Description
%	If the rate is modified to a percentage less than total commission rate, the difference is reflected on section 702.
Adjust Commission (+/-)\$	Enter the dollar amount by which you want to adjust the listing agent commission rate on section 701. To subtract from the commission, insert a minus sign (-) before the adjustment amount.
Description	Enter a description of the adjustment.
Commission	Enter the commission rate to be used to calculate the total commission to be disbursed to the listing agent (or broker). This field is available ONLY in lines 701 and 702. Note: The default is the rate entered in the Total Commission Rate field on section 700.
Less deposit retained	Defaults to any Earnest Money deposit entered in the Earnest Money Deposit grid where "Retained by" equals the listing or selling agent.
HUD-1 to	Select the order contact code for this item. The code entered in this field appears as the default code in the Payees section. The HUD-1 to name field (the unnamed field to the right of HUD-1 to) defaults based on the code selected from the HUD-1 to drop-down. This can be manually overwritten if a different name needs to appear on the settlement statements.

702 Section

The 702 section contains the selling agent commission information.

Field	Description
%	If the rate is modified to a percentage less than selling agent commission rate, the difference is reflected on section 702.
Adjust Commission (+/-)\$	Enter the dollar amount by which you want to adjust the listing agent commission rate on section 701. To subtract from the commission, insert a minus sign (-) before the adjustment amount.
Description	Enter a description of the adjustment.
Commission	Enter the commission rate to be used to calculate the total commission to be disbursed to the selling agent (or broker #1). Note: The default is the rate entered in the Total Commission Rate field minus the rate entered on section 701.
HUD-1 to	Select the order contact code for this item. The code entered in this field appears as the default code in the Payees section. The HUD-1 to name field (the unnamed field to the right of HUD-1 to) defaults based on the code selected from the HUD-1 to drop-down. This can be manually overwritten if a different name needs to appear on the settlement statements.


703 Section

The 703 section contains the commission paid at settlement information.



Field	Description
Re	Enter a memo or other note about this item. Data entered here will be printed in the extended memo on checks and will also appear just to the left of the Borrower column for that item on the HUD-1 settlement statement. Note: For POC amounts up to \$9,999,999.00, the amount and the abbreviation POC appears in the Re field on any section in which a POC amount is entered for any amounts which have been designated as POC in the Payors section.
Buyer Pay %	<p>By default, commissions will be deducted from the Seller's proceeds. To split the commissions between the buyer and seller, use one of the following methods:</p> <p>To split by a percentage</p> <ol style="list-style-type: none">1. Enter the percentage of the commissions to be paid by the buyer in this field.2. Press Tab. The amount the buyer is to pay will be calculated and appear in the Borrower field. The Seller field will be recalculated automatically. <p>To split by a straight amount</p> <ol style="list-style-type: none">1. Enter the amount to be paid by the buyer in the Borrower field.2. Press Tab to move the cursor to the Seller field.3. Press F2 to clear the seller amount and enter the new seller amount.
Borrower	<p>Enter the amount of sales commission to be paid by the buyer/borrower at settlement.</p> <p>Note: The default is calculated using the information entered in section 700 and any percentage entered into the Buyer Pay field.</p> <p>Tip: If the sales agent or broker is retaining a part of the deposit against the sales price (earnest money) to apply towards the sales agent's or broker's commission, include only that part of the commission being disbursed at settlement in Line 703. Enter a description of and the amount the sales agent or broker is retaining as a POC item on section 704.</p>
Seller	<p>Enter the amount of sales commission to be paid by the seller at settlement.</p> <p>Note: The default is calculated using the information entered in section 700 and any percentage entered into the Buyer Pay field.</p> <p>Tip: If the sales agent or broker is retaining a part of the deposit against the sales price (earnest money) to apply towards the sales agent's or broker's commission, include only that part of the commission being disbursed at settlement in section 703.</p>
Comment	Enter an optional comment to be printed on section 703, Page 2 of the HUD-1 settlement statement.
Additional description	<p>Enter any additional information here. Data entered in this field will print on certain settlement statements.</p> <p>Note: To remove this field from the screen, set the Preferences-Additional Description in SPAdmin.</p>

All other 700 Sections

These sections are used for any additional commission amounts.

Field	Description
unnamed field	Enter a description of this section item. Note: This field can be used for a bonus or extra commission.
Re	Enter a memo or other note about this item. Data entered here will be printed in the extended memo on checks and will also appear just to the left of the Borrower column for that item on the HUD-1 settlement statement. Note: For POC amounts up to \$9,999,999.00, the amount and the abbreviation POC appears in the Re field on any section in which a POC amount is entered for any amounts which have been designated as POC in the Payors section.
 Buyer Pay %	Additional 704 charges. By default, commissions will be deducted from the Seller's proceeds. To split the commissions between the buyer and seller, use one of the following methods: To split by a percentage <ol style="list-style-type: none"> 1. Enter the percentage of the commissions to be paid by the buyer in this field. 2. Press Tab. The amount the buyer is to pay will be calculated and appear in the Borrower field. The Seller field will be recalculated automatically. To split by a straight amount <ol style="list-style-type: none"> 1. Enter the amount to be paid by the buyer in the Borrower field. 2. Press Tab to move the cursor to the Seller field. 3. Press F2 to clear the seller amount and enter the new seller amount.
Borrower	Enter the amount the buyer or borrower is to pay. This field may be automatically filled in depending on information entered elsewhere in the file.
Seller	Enter the amount the seller is to pay. This field may be automatically filled in depending on information entered elsewhere in the file.
Additional description	Enter any additional information here. Data entered in this field will print on certain settlement statements. Note: To remove this field from the screen, set the Preferences-Additional Description in SPAdmin.
HUD-1 to	Select the order contact code for this item. The code entered in this field appears as the default code in the Payees section. The HUD-1 to name field (the unnamed field to the right of HUD-1 to) defaults based on the code selected from the HUD-1 to drop-down. This can be manually overwritten if a different name needs to appear on the settlement statements.

Adding and Deleting a 700 Section

The HUD section contains HUD sections 701 through 704. Additional sections can be added by clicking the  button. Beginning with section 705, sections can be deleted by highlighting the section to be deleted and clicking the  button.


Note: Data contained within a section is lost once the section is deleted. You can add the section and data again, but all previous data is lost. A HUD section cannot be deleted if there are additional HUD sections proceeding the section. For example, HUD section 813 could not be deleted if sections 814 and 815 exist. You would have to delete sections 815 and 814 prior to deleting 813.

Loan Charges (800)


Items Payable in Connection with Loan

HUD-1: Defaults to 1 for the first HUD. If multiple HUDs have been added to the order, this drop-down is used to switch between HUDs.

801 Line of the HUD (Our origination charge): Line 801 includes the sum of all charges issued by the loan originator, including but not limited to: loan origination, processing fees, broker fees and yield spread premiums. Enter the percentage of the loan amount in the % field. You can check the **Financed** option to indicate if this fee has been financed into the loan.



Charges can be itemized by using the additional charges button . The itemized charges will appear on the HUD-1 attachment.

802 Line of the HUD (Your credit or charge (points) for the specific interest rate chosen): The 802 section contains the loan discount information. It indicates the charge or credit adjustment as applied to line 801 if applicable. This amount is entered outside the columns in the **Re** field. Indirect payments from a lender to a mortgage broker must be included as a credit on line 802.

Charges can be itemized by using the additional charges button . The itemized charges will appear on the HUD-1 attachment.

All other 800 Lines: The descriptions for all 800 sections greater than 807 are editable. Lines are also editable if you have permission to edit RESPA reserved sections. Depending on permissions, it may also depend on order type. Default values are:

- **Line 803 - Your adjusted origination charges:** This indicates the net amount of the loan origination charges and the sum of the amounts shown in lines 801 and 802. The amount must be entered inside the borrower's column. If there are multiple payees, then disbursements for all 803 line items need to be broken up in the Payee grid.
- **Line 804 - Appraisal fee:** Lines 804-807 indicate each of the "required services that we select" (from the GFE). Each settlement service provider must be identified by name and the amount paid recorded either inside the columns or as paid to the provider outside of closing (POC).
- **Line 805 - Credit report:** records fees for all credit reports
- **Line 806 - Tax service to:** records fees for any tax service
- **Line 807 - Flood Certification:** records any flood certification fees.
- **Lines 808 and up:** These lines are used to record other third-party services required by the loan originator. They may also be used to record other required disclosures from the loan originator.

Adding and Deleting an 800 Line: The HUD section contains HUD sections 801 through 811. Additional sections can be added by clicking the  button. Beginning with section 812, sections can be deleted by highlighting the section to be deleted and clicking the  button.

Note: Data contained within a line is lost once the line is deleted. You can add the line and data again, but all previous data is lost. A HUD line cannot be deleted if there are additional HUD lines after that line. For example, HUD line 813 could not be deleted if lines 814 and 815 exist. You would have to delete lines 815 and 814 prior to deleting 813.

If the **Use 2009 RESPA regulations for HUD-1 & HUD-1A** is not checked, HUD lines appear as follows:

801 Line of the HUD: The 801 section contains the loan origination fee information.

802 Line of the HUD: The 802 section contains the loan discount information.

All other 800 Lines: The descriptions for all 800 sections greater than 807 are editable. Lines are also editable if you have permission to edit RESPA reserved sections. Depending on permissions, it may also depend on order type. Default values are:

- Line 803 - Appraisal Fee
- Line 804 - Credit Report
- Line 805 - Lender's Inspection Fee
- Line 806 - Mortgage Insurance Application Fee
- Line 807 - Assumption Fee

Good faith estimate type: Following are some examples of good faith estimate types. Select from one of the following:

Cannot increase	Can increase up to 10%	Can change
<ul style="list-style-type: none"> • Lender origination charge • Your credit or charge (points) for the specific interest rate chosen (after borrower locks in interest rate) • Your adjusted origination charges (after borrower locks in interest rate) • Transfer taxes 	<ul style="list-style-type: none"> • Required services selected by lender • Title services and lender's title insurance (if selected by lender or borrower uses companies identified by lender) • Owner's title insurance (if borrower uses companies identified by lender) • Required services that you can shop for (if borrower uses companies identified by lender) • Government recording charges • Government recording charges 	<ul style="list-style-type: none"> • Required services that you can shop for (if borrower does not use companies identified by lender) • Title services and lender's title insurance (if borrower does not use companies identified by lender) • Owner's title insurance (if borrower does not use companies identified by lender) • Initial deposit for your escrow account • Daily interest charges • Homeowner's insurance

Good faith estimate amount: Enter the amount that appears on the good faith estimate for this charge.

Good faith estimate number: The GFE number is available only when the Use 2009 RESPA regulations for HUD-1 & HUD-1A option is checked. It corresponds to the GFE number on page 2 of the HUD. Default values are based on HUD-1 line numbers. Examples include:

- **3:** "Required services selected by lender"
- **6:** "Required services that you can shop for"
- **11:** "Homeowner's insurance"

Prepaid Loan Charges (900)

This section contains information for the 900 section of the HUD. Lines **901 - 905:** This series is used to record the items which the lender requires (but which are not necessarily paid to the lender, i.e., FHA mortgage insurance premium) to be paid at the time of settlement, other than reserves collected by the lender and recorded in 1000 series.

Line 901 is used if interest is collected at settlement for a part of a month or other period between settlement and the date from which interest will be collected with the first regular monthly payment. Enter that amount here and include the per diem charges. If such interest is not collected until the first regular monthly payment, no entry should be made on line 901. Interim interest fields on line 901, on the Prepaid Loan Charges (900) screen can now be modified. Any edits made in fields on line 901 update the corresponding interim interest fields on the Loan Terms & Payments screen.

Line 902 is used for mortgage insurance premiums due and payable at settlement, except reserves collected by the lender and recorded in the 1000 series. A lump sum mortgage insurance premium paid at settlement should be inserted on line 902, with a note that indicates that the premium is for the life of the loan.

Line 903 is used for hazard insurance premiums which the lender requires to be paid at the time of settlement except reserves collected by the lender and recorded in the 1000 series.

Lines 904 and 905 are used to list additional items required by the lender (except for reserves collected by the lender and recorded in the 1000 series) including flood insurance, mortgage life insurance, credit life insurance and disability insurance premiums. These lines are also used to list amounts paid at settlement for insurance not required by the lender.

Interim interest to be paid: Select how interim interest is to be paid. The default is on HUD-1 line 901. An additional option would be in first payment, in which case the interim interest will be added to the **First Payment Amount** field. When this option is chosen the interim interest will not appear on the HUD-1. The total amount of interim interest appears on the 901 section of the Prepaid Loan Charges (900) screen, located on the HUD-1 tab.

Note: The interim interest can be sent to whatever HUD section is specified in the section drop-down – may not always be section 901. On the Prepaid Loan Charges screen you can show the interim interest as POC (paid outside of closing).

Per diem decimal digits: Select the number of decimal places (1-6) you want to include when interim interest is calculated. **Note:** Select Do not Round Per Diem if you prefer not to have the interim interest rounded up. The per diem interim interest will be chopped off or rounded to the number of digits selected from the **Per Diem Number of Decimal Digits** field.

Per diem based on: Select the number of days per year on which the interim interest calculation should be based. Select **Based On 30 Day Months** if you wish to base the interim interest calculation on 30-day months regardless of the actual number of days in each month involved in the calculation.

Per diem from date of: Select the date on which the calculation of interim interest is to be based. The date range and number of days of interim interest will be based on the date selected here. The range of dates and total number of days of interim interest will be entered automatically using the date selected in the Per diem from date of field.

Per Diem rate, Total amount of interim interest: The per diem amount of interim interest will automatically be filled in based on the **Annual Interest Rate** field and the date range specified for the calculation of interim interest. You can enter a manual per diem rate. The total amount of interim interest appears after the equal sign. The total amount appears in the Borrower column of line 901.

Months: Enter the number of months of mortgage insurance.

Years: Enter 1 (one-year hazard insurance policy) or .5 (six-month hazard insurance policy) to be paid in advance in the Years field.

Escrow on line: Select the line that you want to use to collect escrows for that charge. Select the line, for example 1006, then go to that line on the Escrows screen and enter the number of months (for the cushion). This calculates the buyer or seller amount for that escrow amount.

Life of loan: Check to indicate that the premium is for the life of the loan.

Good faith estimate type: Following are some examples of good faith estimate types. Select from one of the following:

Cannot increase	Can increase up to 10%	Can change
<ul style="list-style-type: none"> • Lender origination charge • Your credit or charge (points) for the specific interest rate chosen (after borrower locks in interest rate) • Your adjusted origination charges (after borrower locks in interest rate) • Transfer taxes 	<ul style="list-style-type: none"> • Required services selected by lender • Title services and lender's title insurance (if selected by lender or borrower uses companies identified by lender) • Owner's title insurance (if borrower uses companies identified by lender) • Required services that you can shop for (if borrower uses companies identified by lender) • Government recording charges • Government recording charges 	<ul style="list-style-type: none"> • Required services that you can shop for (if borrower does not use companies identified by lender) • Title services and lender's title insurance (if borrower does not use companies identified by lender) • Owner's title insurance (if borrower does not use companies identified by lender) • Initial deposit for your escrow account • Daily interest charges • Homeowner's insurance

Good faith estimate amount: Enter the amount that appears on the good faith estimate for this charge.

Good faith estimate number: The GFE number is available only when the Use 2009 RESPA regulations for HUD-1 & HUD-1A option is checked. It corresponds to the GFE number on page 2 of the HUD. Default values are based on HUD-1 line numbers. Examples include:

- **3:** "Required services selected by lender"
- **6:** "Required services that you can shop for"
- **11:** "Homeowner's insurance"

Escrows (1000)

This section contains information for the 1000 section of the HUD. Escrow item information, including aggregate payment schedules, is entered on the Escrows (1000) window.

Line 1001, "Initial deposit for your escrow account": Used to indicate the total amount collected by the Lender from the Borrower that is held in an account for the future payment of the obligations listed as they fall due. Line 1001 must be listed in the column as it is the total for the 1000 section.

Lines 1002 – 1099: Used for amounts collected by the Lender from the Borrower and held in an account for the future payment of the obligations listed as they fall due. Include the time period (number of months) and the monthly assessment. In many jurisdictions this is referred to as an "escrow", "impound", or "trust" account. In addition to the property taxes and insurance listed, some Lenders may require reserves for flood insurance, condominium owners' association assessments, etc. Lines 1002 through 1099 must be listed outside the columns and are summed onto line 1001. Any aggregate adjustment amount should be listed outside the column on the last line in the 1000 section.

Seller Pay: Enter the percentage of the reserves deposited with the lender that the seller is to pay. **Note:** This field is only available when the option Use 2009 RESPA regulations for HUD-1 & HUD-1A on the Options screen is not checked.

Borrower: Enter the amount of escrow payment due from the buyer/borrower at closing.

Seller: Enter the amount of escrow payment due from the seller at closing. **Note:** This field is only available when the option Use 2009 RESPA regulations for HUD-1 & HUD-1A on the Options screen is not checked.

Months/Pmts@: Enter the number of months (or payments) that the Lender is requiring to be collected.

Each: Enter the payment amount.

Good faith estimate type: Following are some examples of good faith estimate types. Select from one of the following:

Cannot increase	Can increase up to 10%	Can change
<ul style="list-style-type: none"> Lender origination charge Your credit or charge (points) for the specific interest rate chosen (after borrower locks in interest rate) Your adjusted origination charges (after borrower locks in interest rate) Transfer taxes 	<ul style="list-style-type: none"> Required services selected by lender Title services and lender's title insurance (if selected by lender or borrower uses companies identified by lender) Owner's title insurance (if borrower uses companies identified by lender) Required services that you can shop for (if borrower uses companies identified by lender) Government recording charges Government recording charges 	<ul style="list-style-type: none"> Required services that you can shop for (if borrower does not use companies identified by lender) Title services and lender's title insurance (if borrower does not use companies identified by lender) Owner's title insurance (if borrower does not use companies identified by lender) Initial deposit for your escrow account Daily interest charges Homeowner's insurance

Good faith estimate amount: Enter the amount that appears on the good faith estimate for this charge.

Good faith estimate number: The GFE number is available only when the Use 2009 RESPA regulated HUD-1 & HUD-1A option is checked. It corresponds to the GFE number on page 2 of the HUD. Default values are based on HUD-1 line numbers. Examples include:

- **3:** "Required services selected by lender"
- **6:** "Required services that you can shop for"
- **11:** "Homeowner's insurance"

Title Charges (1100)

This section contains information for the 1100 section of the HUD.

1101 through 1106 Lines of the HUD: Each of these HUD sections contain the same fields in ProForm. Default values for each HUD section are:

- **Line 1101 - Title services and lender's title insurance:** Records the total for the category of "Title services and lender's title insurance." This amount must be listed in the columns.
- **Line 1102 - Settlement or closing fee:** Records the settlement or closing fee. This amount must be listed outside the columns.
- **Line 1103 - Owner's title insurance:** Records the charges for the owner's title insurance and related endorsements. This amount must be listed in the columns.
- **Line 1104 - Lender's title insurance:** Records the lender's title insurance premium and related endorsements. Amount is shown outside the column and included in the total appearing on line 1101.
- **Line 1105 - Lender's title policy limit:** Records the amount of the lender's title policy limit (aka coverage amount). This amount is recorded outside of the columns.
- **Line 1106 - Owner's title policy limit:** Records the amount of the owner's title policy limit (aka coverage amount). This amount is recorded outside of the columns.

Line 1107 - Agent's portion of the total title insurance premium: records the amount of the total title insurance premium, including endorsements, that is retained by the title agent. This amount is recorded outside of the columns.

Line 1108 - Underwriter's portion of the total title insurance premium: Records the amount of the total title insurance premium, including endorsements, that is retained by the title underwriter. This amount is recorded outside of the columns.

1109 and 1110 Lines of the HUD: Additional sequentially numbered lines in the 1100-series may be used to itemize title charges paid to other third parties, as identified by name and type of service provided. Show inside column if charge is not associated with the GFE and is payable to a 3rd party. Show outside column if charge is associated with the GFE and included on line 1101.

1111 and other HUD lines: Additional sequentially numbered lines in the 1100-series may be used to itemize title charges paid to other third parties, as identified by name and type of service provided. Show inside column if charge is not associated with the GFE and is payable to a 3rd party. Show outside column if charge is associated with the GFE and included on line 1101.

Additional disclosure: Displays on lines 1103 and 1104 when the **Use 2009 RESPA regulations for HUD-1 and HUD-1A** option is checked. This field shows any additional disclosures associated with an owner's or loan policy premium.

Note: If the **Use 2009 RESPA regulations for HUD-1 & HUD-1A** option is not checked, HUD lines appear as follows:

- **Line 1101** - settlement or closing fee
- **Line 1102** - abstract or title search
- **Line 1103** - title examination
- **Line 1104** - title insurance binder
- **Line 1105** - document preparation
- **Line 1106** - notary fees
- **1107 Line of the HUD:** The 1107 section contains attorney's fees information.
- **1108 Line of the HUD:** The 1108 section contains title insurance information.
- **1109 and 1110 Lines of the HUD:** Each of these HUD sections contain the same fields in ProForm. Default values for each HUD section are:
 - **Line 1109** - lender's coverage
 - **Line 1110** - owner's coverage
- **1111 and other Lines of the HUD:** The 1111 section contains additional information for the 1100 section of the HUD.



Includes numbers: Enter HUD line numbers to indicate that fees for those lines are all included in that one charge. For example, line 1107 may have includes numbers 1101, 1102. This tells the buyer or seller that the “Settlement or Closing Fee” and “Abstract or Title Search” are all lumped in as one fee on line 1107 “Attorney’s Fees”.

Print agent/underwriter split on HUD-1: Check this option to show each agent and underwriter portion of the premium on the HUD-1 Settlement Statement.

Show premium on HUD-1 (1109): Enter the loan policy premium amount to appear on the HUD-1 Settlement Statement.

Show premium on HUD-1 (1110): Enter the owner’s policy premium amount to appear on the HUD-1 Settlement Statement.

Adding and Deleting an 1100 Line of the HUD: The HUD section contains HUD sections 1100 through 1113.

Additional sections can be added by clicking the  button. Beginning with section 1114, sections can be deleted by highlighting the section to be deleted and clicking the  button.

Note: Data contained within a section is lost once the section is deleted. You can add the section and data again, but all previous data is lost. A HUD section cannot be deleted if there are additional HUD sections proceeding the section. For example, HUD section 813 could not be deleted if sections 814 and 815 exist. You would have to delete sections 815 and 814 prior to deleting 813.

Go To: Select one of the following options from the drop-down.

Option	Description
Title Insurance	Displays the Title Insurance Premium Calculation screen.
Premiums	
Endorsements	Displays the Endorsements screen.
Additional Title	Displays the Additional Title Charges screen.
Charges	

Taxable: Check this option to indicate if the charge is taxable. **Note:** This option is visible only when the Sales Tax option in SPAdmin, Preferences, ProForm Order Options is checked.

Good faith estimate type: Following are some examples of good faith estimate types. Select from one of the following:

Cannot increase	Can increase up to 10%	Can change
<ul style="list-style-type: none"> • Lender origination charge • Your credit or charge (points) for the specific interest rate chosen (after borrower locks in interest rate) • Your adjusted origination charges (after borrower locks in interest rate) • Transfer taxes 	<ul style="list-style-type: none"> • Required services selected by lender • Title services and lender's title insurance (if selected by lender or borrower uses companies identified by lender) • Owner's title insurance (if borrower uses companies identified by lender) • Required services that you can shop for (if borrower uses companies identified by lender) • Government recording charges • Government recording charges 	<ul style="list-style-type: none"> • Required services that you can shop for (if borrower does not use companies identified by lender) • Title services and lender's title insurance (if borrower does not use companies identified by lender) • Owner's title insurance (if borrower does not use companies identified by lender) • Initial deposit for your escrow account • Daily interest charges • Homeowner's insurance

Good faith estimate amount: Enter the amount that appears on the good faith estimate for this charge.

Good faith estimate number: The GFE number is available only when the Use 2009 RESPA regulations for HUD-1 & HUD-1A option is checked. It corresponds to the GFE number on page 2 of the HUD. Default values are based on HUD-1 line numbers. Examples include:

- **3:** "Required services selected by lender"
- **6:** "Required services that you can shop for"
- **11:** "Homeowner's insurance"

Recording Charges (1200)

This section contains information for the 1200 section of the HUD.

1201 through 1299 Sections: Default values for each HUD section are:

- **Line 1201 Government recording charges** - Records the total government recording charges. The amount must be listed in the columns.
- **Line 1202 Deed/Mortgage/Release** - Records the itemized recording charges outside of the columns.
- **Line 1203 Transfer taxes** - Records transfer taxes, and the amount must be listed in the columns.
- **Line 1204 City/County tax/stamps** - Records the amounts for local transfer taxes and stamps outside of the columns.
- **Line 1205 State tax/stamps** - records the amounts for State transfer taxes and stamps outside of the columns.
- **Lines 1206-1299** - Records specific itemized third party charges for government recording and transfer services, but the amounts must be listed outside the columns.

Note: If the **Use 2009 RESPA regulations for HUD-1 & HUD-1A** is not checked, HUD lines appear as follows:

- **Line 1201** - recording fees
- **Line 1202** - city/county tax stamps
- **Line 1203** - state tax/stamps

Description: Enter a brief description of this disbursement.

Re: Enter a memo or other note about this item. The contents of the Re: field for a HUD-1 settlement statement section item will be printed on any separate check for that item. It will also appear just to the left of the Borrower column for that item on the Laser HUD-1 settlement statement.

Borrower: Enter the amount the buyer or borrower is to pay in the Borrower column. Enter the amount the seller is to pay in the Seller column.

Seller: The amount to be paid by the seller will calculate based on the fee schedule grid amount multiplied by the value entered in **Seller Pay %**.

HUD-1 To Code: Select the order contact code for this item. The code entered in this field appears as the default code in the Payees grid.

HUD-1 To Name: Defaults based on the code selected from the HUD-1 To Code drop-down. This can be manually overwritten if a different name needs to appear on the settlement statements.



Fee Schedule Grid

Field	Description
Fee Schedule Type	Indicates if fee schedules are for recording, city/county tax/stamps or state tax/stamps.
Pages	Enter the number of pages for the deed, mortgage, or release.
Document	Select the type of document from the drop-down list. Options vary per HUD section. Line 1201 - Deed, Mortgage/Deed of Trust, Release Lines 1202 & 1203 - Deed, Mortgage/Deed of Trust Lines 1204 through 1299 - Deed, Mortgage/Deed of Trust, Release, Other
Fee Schedule	Select the formula to use for the calculation. Note: to add formulas, please go to SPAdmin-Managers , then Fee Schedule then Recording Fees .
Amount	Based on the number of pages, the document and the fee schedule selected the amount appears. Note: The total amount of fees entered in this column appears in the Borrower column. A portion of the fees may also appear in the Seller column depending on the percentages entered in the Seller Pay% field for each fee in the table. If you do not want to use the fee schedule manager, you can type the amount in directly.
Seller Pay %	Enter the percentage of this item that the seller is to pay. The amount the seller is to pay will be calculated automatically based on the default amount in the Borrower column and will be entered into the Seller column.

1204 and 1205 Sections: Each of these HUD sections contain the same fields in ProForm. See [Fee Schedule Grid](#) for information on Pages, Document, Fee schedule, Amount, and Seller Pay %.

RESPA: Select the appropriate description from the list of RESPA* s defined fee types.

Additional description: Enter any additional information here. Data entered in this field will print on certain settlement statements. Note: To remove this field from the screen, set the Preferences-Additional Description in SPAdmin.

Adding and Deleting a 1200 Section: The HUD section contains HUD sections 1200 through 1205. Additional sections can be added by clicking the  button. Beginning with section 1206, sections can be deleted by highlighting the section to be deleted and clicking the  button.

Note: Data contained within a section is lost once the section is deleted. You can add the section and data again, but all previous data is lost. A HUD section cannot be deleted if there are additional HUD sections proceeding the section. For example, HUD section 813 could not be deleted if sections 814 and 815 exist. You would have to delete sections 815 and 814 prior to deleting 813.

Taxable: Check this option to indicate if the charge is taxable. **Note:** This option is visible only when the Sales Tax option in SPAdmin, Preferences, ProForm Order Options is checked.

Good faith estimate type: Following are some examples of good faith estimate types. Select from one of the following:

Cannot increase	Can increase up to 10%	Can change
<ul style="list-style-type: none"> • Lender origination charge • Your credit or charge (points) for the specific interest rate chosen (after borrower locks in interest rate) • Your adjusted origination charges (after borrower locks in interest rate) • Transfer taxes 	<ul style="list-style-type: none"> • Required services selected by lender • Title services and lender's title insurance (if selected by lender or borrower uses companies identified by lender) • Owner's title insurance (if borrower uses companies identified by lender) • Required services that you can shop for (if borrower uses companies identified by lender) • Government recording charges • Government recording charges 	<ul style="list-style-type: none"> • Required services that you can shop for (if borrower does not use companies identified by lender) • Title services and lender's title insurance (if borrower does not use companies identified by lender) • Owner's title insurance (if borrower does not use companies identified by lender) • Initial deposit for your escrow account • Daily interest charges • Homeowner's insurance

Good faith estimate amount: Enter the amount that appears on the good faith estimate for this charge.

Good faith estimate number: The GFE number is available only when the Use 2009 RESPA regulations for HUD-1 & HUD-1A option is checked. It corresponds to the GFE number on page 2 of the HUD. Default values are based on HUD-1 line numbers. Examples include:

- **3:** "Required services selected by lender"
- **6:** "Required services that you can shop for"
- **11:** "Homeowner's insurance"

** The Real Estate Settlement Procedures Act (12 U.S.C. 2601) which, together with Regulation X promulgated pursuant to the act, regulate real estate transfers involving "federally related mortgage loans" by requiring, among other things, certain disclosures to borrower*


Additional Charges (1300)

HUD Line Grid

Lines 1301 and additional sequentially numbered lines must be used to record required services that the borrower can shop for, such as fees for survey, pest inspection or other similar inspections. Enter any required service amount in the Required services field. The total of all amounts entered in Required services will appear in the Borrower amount field on line 1301.

These lines may also be used to record additional itemized settlement charges that are not included in a specific category, such as fees for structural and environmental inspections; pre-sale inspections of heating, plumbing or electrical equipment; or insurance or warranty coverage. The amounts must be listed in either the borrower's or seller's column.

Adding and Deleting a 1300 Section of the HUD

The HUD section contains HUD lines 1301 through 1305. Additional lines can be added by clicking the  button.

Beginning with line 1306, lines can be deleted by highlighting the line to be deleted and clicking the  button.

Note: Data contained within a line is lost once the line is deleted. You can add the line and data again, but all previous data is lost. A HUD line cannot be deleted if there are additional HUD lines preceding the line. For example, HUD line 813 could not be deleted if lines 814 and 815 exist. You would have to delete lines 815 and 814 prior to deleting 813.

Taxable: Check this option to indicate if the charge is taxable. **Note:** This option is visible only when the Sales Tax option in SPAdmin, Preferences, ProForm Order Options is checked.

Good faith estimate type: Following are some examples of good faith estimate types. Select from one of the following:

Cannot increase	Can increase up to 10%	Can change
<ul style="list-style-type: none"> • Lender origination charge • Your credit or charge (points) for the specific interest rate chosen (after borrower locks in interest rate) • Your adjusted origination charges (after borrower locks in interest rate) • Transfer taxes 	<ul style="list-style-type: none"> • Required services selected by lender • Title services and lender's title insurance (if selected by lender or borrower uses companies identified by lender) • Owner's title insurance (if borrower uses companies identified by lender) • Required services that you can shop for (if borrower uses companies identified by lender) • Government recording charges 	<ul style="list-style-type: none"> • Required services that you can shop for (if borrower does not use companies identified by lender) • Title services and lender's title insurance (if borrower does not use companies identified by lender) • Owner's title insurance (if borrower does not use companies identified by lender) • Initial deposit for your escrow account • Daily interest charges • Homeowner's insurance

Good faith estimate amount: Enter the amount that appears on the good faith estimate for this charge.

Good faith estimate number: The GFE number is available only when the Use 2009 RESPA regulated HUD-1 & HUD-1A option is checked. It corresponds to the GFE number on page 2 of the HUD. Default values are based on HUD-1 line numbers. Examples include:

- **3:** "Required services selected by lender"
- **6:** "Required services that you can shop for"
- **11:** "Homeowner's insurance"

Disbursements to Others (1500)

Description: Enter a description of this disbursement.

Re: Enter a memo or other note about this item. The contents of the Re field for a HUD-1 A settlement statement section item are printed on any separate check for that item. It also appears just to the left of the Borrower column for that item on the HUD-1 A settlement statement. **Note:** For POC amounts up to \$9,999,999.00, the amount and the abbreviation POC appears in the Re field on any section in which a POC amount is entered.

Borrower: Enter the amount the buyer or borrower is to pay in the Borrower column.

Format for Entering Amounts

When entering amounts into Borrower columns, you do not need to include dollar signs or commas in your entry. For instance, to enter \$500.00, type 500. Decimal points are necessary to indicate amounts under \$1.00. For instance, to enter \$500.75, type 500.75.

HUD-1 To Code/Name: Select a code from the drop-down list. The HUD-1 To Name field automatically fills in once you select a code. **Note:** Amounts may not be entered into the 1500 section if the HUD-1 A option is not selected.

Good faith estimate type: Following are some examples of good faith estimate types. Select from one of the following:

Cannot increase	Can increase up to 10%	Can change
<ul style="list-style-type: none"> • Lender origination charge • Your credit or charge (points) for the specific interest rate chosen (after borrower locks in interest rate) • Your adjusted origination charges (after borrower locks in interest rate) • Transfer taxes 	<ul style="list-style-type: none"> • Required services selected by lender • Title services and lender's title insurance (if selected by lender or borrower uses companies identified by lender) • Owner's title insurance (if borrower uses companies identified by lender) • Required services that you can shop for (if borrower uses companies identified by lender) • Government recording charges • Government recording charges 	<ul style="list-style-type: none"> • Required services that you can shop for (if borrower does not use companies identified by lender) • Title services and lender's title insurance (if borrower does not use companies identified by lender) • Owner's title insurance (if borrower does not use companies identified by lender) • Initial deposit for your escrow account • Daily interest charges • Homeowner's insurance

Good faith estimate amount: Enter the amount that appears on the good faith estimate for this charge.


Good faith estimate number: The GFE number is available only when the Use 2009 RESPA regulated HUD-1 & HUD-1A option is checked. It corresponds to the GFE number on page 2 of the HUD. Default values are based on HUD-1 line numbers. Examples include:


- **3:** "Required services selected by lender"
- **6:** "Required services that you can shop for"
- **11:** "Homeowner's insurance"

Buyer/Borrower Debits (100)

This section contains information for the 100 section of the HUD.

Adding and Deleting a 100 Line of the HUD

The HUD section contains HUD sections 101 through 112. Additional sections can be added by clicking .

Beginning with section 113, sections can be deleted by highlighting the section to be deleted and clicking .

Note: Line 119 is the last section that can be added.

101 through 112 Lines of the HUD

Default values for HUD sections 101 through 108 are:

- Line 101 - Contract Sales Price
- Line 102 - Personal Property
- Line 103 - Settlement Charges to Borrower (section 1400)
- Line 106 - City/Town Taxes
- Line 107 - County Taxes
- Line 108 - Assessments

Re: Enter a memo or other note about this item. The contents of the Re field for a HUD-1 settlement statement section item will be printed on any separate check for that item. It will also appear just to the left of the Borrower column for that item on the Laser HUD-1 settlement statement.

Borrower: Enter the amount the buyer or borrower is to pay in the Borrower column. Enter the amount the seller is to pay in the Seller column.

HUD-1 To Code: Select the order contact code for this item. The code entered in this field appears as the default code in the Payees grid.

HUD-1 To Name: defaults based on the code selected from the HUD-1 To Code drop-down. This can be manually overwritten if a different name needs to appear on the settlement statements.

Buyer/Borrower Credits (200)

This section contains information for the 200 section of the HUD.

Adding and Deleting a 200 Line of the HUD

The HUD section contains HUD sections 201 through 219. Additional sections cannot be added and existing sections cannot be deleted from the section.

201 Line of the HUD

Default values for HUD sections 201 through 212 are:

- Line 201 - Deposit or Earnest Money
- Line 202 - Principal Amount of New Loan(s)
- Line 203 - Existing Loan(s) Taken Subject to
- Line 210 - City/Town Taxes
- Line 211 - County Taxes
- Line 212 - Assessments

Seller Debits (500)

This section contains information for the 500 section of the HUD.

Adding and Deleting a 500 Section

The HUD section contains HUD sections 501 through 519. Additional sections cannot be added and existing sections cannot be deleted from the grid. Lines that are not disabled can be edited by selecting the section and changing the information in the fields below the grid.

501 through 503 Sections



Field	Description
Description field with link	<p>Default values for HUD sections 501 through 503 are:</p> <p>Line 501 - Excess Deposit: Displays the Deposit or Earnest Money screen. Use this field if one of the brokers is holding an earnest money deposit that is greater than the broker's commission and the broker is giving the excess deposit directly to the seller.</p> <p>Note: The amount of the total deposit (including commissions) should be entered on section 201.</p> <p>Line 502 - Settlement Charges to Seller (1400 section): Displays the total seller charges from section 1400.</p> <p>Line 503 - Existing Loan(s) Taken Subject to: Displays the Existing Loans screen. Enter the assumption amount.</p> <p>Note: Use this section if the buyer/borrower is assuming or taking title subject to existing liens which are to be deducted from the sales price.</p>
Credit/Debit	<p>Select this option to indicate that the fee is a debit to the seller and a credit to the buyer in the corresponding 200 section.</p> <p>Note: When selected, the Payor and Payee grids are disabled.</p>
Seller	<p>Enter the amount the seller is to pay. This field may be automatically filled in depending on information entered elsewhere in the file.</p>
Calculation basis	<p>Principal balance: Enter the principal balance remaining on the loan and then enter any lump sum of interest charged in the Interest charged field.</p> <p>Payoff amount: Enter the payoff amount given. This amount usually includes the principal balance and interest. The Principal balance, Interest charged, and Interest to fields will be disabled when Payoff amount is selected.</p>

Payoff expires on	Select a date from the drop-down. This is the date at which the Payoff letter will no longer be valid.
Per diem	Enter the daily amount of interest.
Payoff date basis	Select one of the following: Settlement, Proration, Disbursement (default setting), Other . When a selection is made in this field, the corresponding date will be entered in the Through date and the Through date filed will be disabled. If Other is selected, the Through date field will be blank and enabled.
Additional interest from	Defaults from the first day of the month of Settlement. To: Select a date from the drop-down. Day(s)+: Enter the number of days inclusive in the Additional interest from and Through date range. For example: 01/01/07 - 01/09/07 will compute 9 in this field. Extra day(s): Enter the number of extra days to be charged above the calculated number of days in Day(s)+.
Additional interest	Compute from (Per diem * (Days+ X Extra days))
Late fee	Enter any late fees to be charged. After: Select a date after which the late fee should be added to the total. This date is compared to the Through date. If the After is greater than the Through date, the late fee is added into the total. If After is less than or equal to the Through date, the late fee is not added to the total. If a date is not entered in the Through date, then the late fee is never added to the total.

Seller Credits (400)

This section contains information for the 400 section of the HUD.

Adding and Deleting a 400 Section of the HUD

The HUD section contains HUD sections 401 through 412. Additional sections can be added by clicking the  button. Beginning with section 413, sections can be deleted by highlighting the section to be deleted and clicking the  button. **Note:** Line 419 is the last section that can be added.

401 Section

Field	Description
Contract Sales Price link	Displays the Sales Contract and Earnest Money screen.
Re	Enter a memo or other note about this item. Data entered here will be printed in the extended memo on checks and will also appear just to the left of the Borrower column for that item on the HUD-1 settlement statement. Note: For POC amounts up to \$9,999,999.00, the amount and the abbreviation POC appears in the Re field on any section in which a POC amount is entered for any amounts which have been designated as POC in the Payors section.
Credit/Debit	Select this option to indicate that the fee is a credit to the seller and a debit to the buyer on the corresponding 100 section. Note: When selected, the Payor and Payee sections are

	disabled.
Seller	Enter the amount the seller is to pay. This field may be automatically filled in depending on information entered elsewhere in the file.
Additional Description	Enter any additional information here. Data entered in this field will print on certain settlement statements. Note: To remove this field from the screen, set the Preferences-Additional Description in SPAdmin.

Order Transactions

The Order Transactions screen provides a summary view of receipts and disbursements. Amounts shown in this screen are generated from data entered in the order and flow into the register. Only the buyer- and seller-related amounts can be edited from this screen.

CDF

Receipts

The top half of the grid lists order receipts and corresponding CDFs. Hyperlinks here may be clicked on to view name and loan details.

Receipts:

	CDF	Code	Name	Amount	Details
▶	1	BA	Bob Buyer and Mariana Monet	\$401,086.00	From Buyer
Σ				Total: \$401,086.00	

- The **Code** column is editable and may be adjusted manually.

Disbursements

The bottom half of the grid lists order disbursements. Hyperlinks here may be clicked on to view name and loan details. **Note:** The **Group...** hyperlink functions differently than the other hyperlinks, and opens up the Disbursement details dialog.

Disbursements:

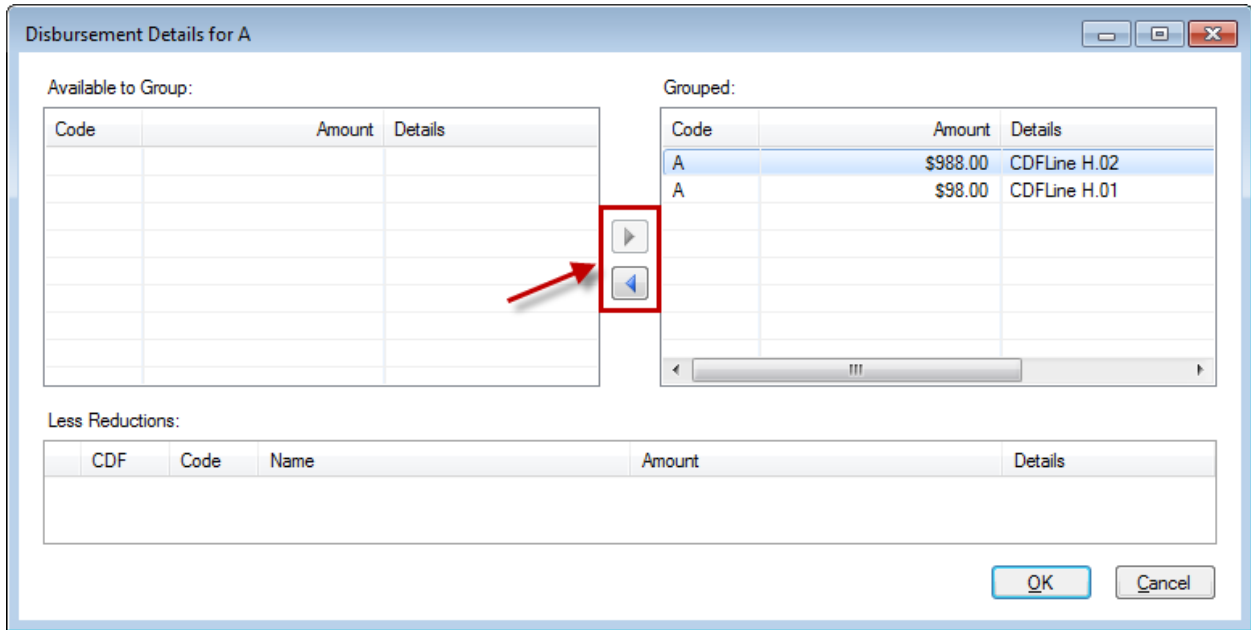
	CDF	Code	Name	Amount	Held	Details
▶	1	A		\$1,086.00	<input type="checkbox"/>	Group...
	1	S	Sarah Seller	\$400,000.00	<input type="checkbox"/>	To Seller
Σ				Total: \$401,086.00		

- **CDF (read only):** Displays the CDF number from which the receipt or disbursement was generated.
- **Code (editable):** Indicates the order contact code of the person or organization associated with the receipt or disbursement.
- **Name:** Contains the name of the person or company associated with the payee code selected. An individual name appears if a separate disbursement will be generated for that person.
- **Amount:** The sum of the money being distributed or receipted to an individual or organization.

- **Held:** Indicates money that has not yet been distributed. If checked, it is also indicates as held in the register.
- **Details:** Indicates the destination of the money being distributed. If the Group hyperlink is present, it indicates that the receipt or disbursement is made up of multiple items. Selecting the Group hyperlink displays the details of items in the group.

DISBURSEMENT DETAILS DIALOG

To access the **Disbursement Details dialog**, you may double-click on the shaded area of any row in the Disbursements grid, or use the **Group...** hyperlink. See [section above](#) for details. The screen provides a convenient way to view, group, and ungroup disbursements:



- **Grouping:** Highlight a row in the Available to Group grid on the left and click the right arrow button to move the disbursement to the Grouped grid. Continue for all rows to group. Click **OK** when finished.
- **Ungrouping:** Highlight a row in the Grouped grid on the right side and click the left arrow button to move the disbursement to the Available to Group grid. Continue for all rows to ungroup. Click **OK** when finished.
- **Details:** Indicates the source of the money to be distributed.

HUD-1

Receipts

The top half of the grid lists order receipts and HUDs. Hyperlinks here may be clicked on to view name and loan details. **Note:** The **Group...** hyperlink functions differently than the other hyperlinks, and opens up the Disbursement details dialog.

Receipts:

	HUD	Code	Name	Amount	Details
▶	1	L	Big Money Bank	\$900,000.00	Loan Funding...

Σ **Total: \$900,000.00**

Disbursements

The bottom half of the grid lists order disbursements. Hyperlinks here may be clicked on to view name and loan details. **Note:** The **Group...** hyperlink functions differently than the other hyperlinks, and opens up the Disbursement details dialog.

Disbursements:

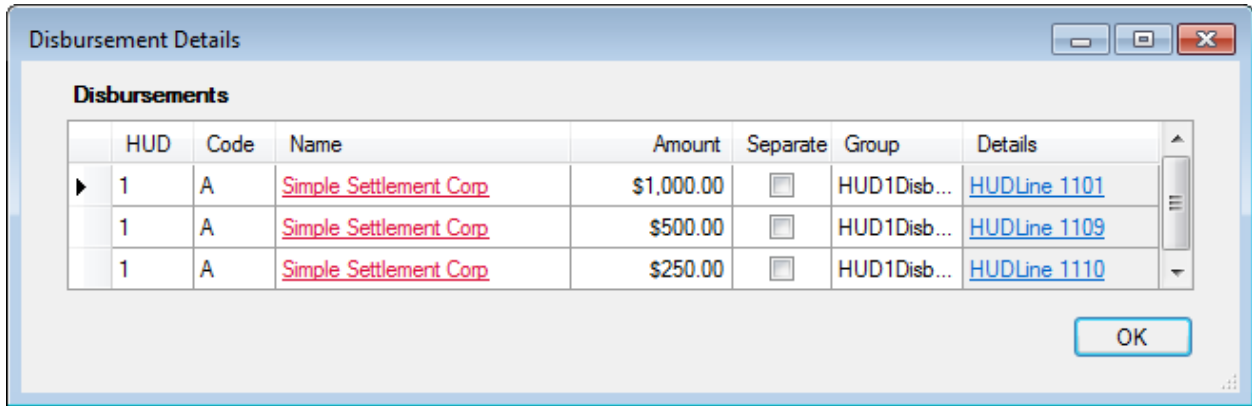
	HUD	Code	Name	Amount	Held	Group	Details
▶	1	BA	Barry Buyer	\$897,050.00	<input type="checkbox"/>		To Buyer
	1	S	Samuel Seller	\$1,200.00	<input type="checkbox"/>		To Seller
	1	A	Simple Settlement Corp	\$1,750.00	<input type="checkbox"/>		Group...

Σ **Total: \$900,000.00**

- **HUD (read only):** Displays the HUD-1 number from which the receipt or disbursement was generated.
- **Code (editable):** Indicates the order contact code of the person or organization associated with the receipt or disbursement.
- **Name:** Indicates the name of the person or company associated with the payee code selected. An individual name appears if a separate disbursement will be generated for that person.
- **Amount:** The sum of the money being distributed or received to an individual or organization.
- **Held:** Money that has not yet been distributed. If checked, it is also indicated as held in the register.
- **Group:** Combines several disbursements into one disbursement to be distributed to one person or organization. The Group drop-down in the Disbursements grid is enabled only when there are other disbursements to the same order contact for the associated HUD, otherwise it is disabled. Once an item is selected and grouped with the other disbursements to that order contact, the amount will be changed to reflect the total disbursement to that order contact for that group check. Once the disbursements have been grouped for that order contact, the Details column will show a “group” hyperlink.
- **Details:** Indicates the destination for the money being distributed. If the Group hyperlink is present, it indicates that the receipt or disbursement is made up of multiple items. Selecting the Group hyperlink displays the details of items in the group:

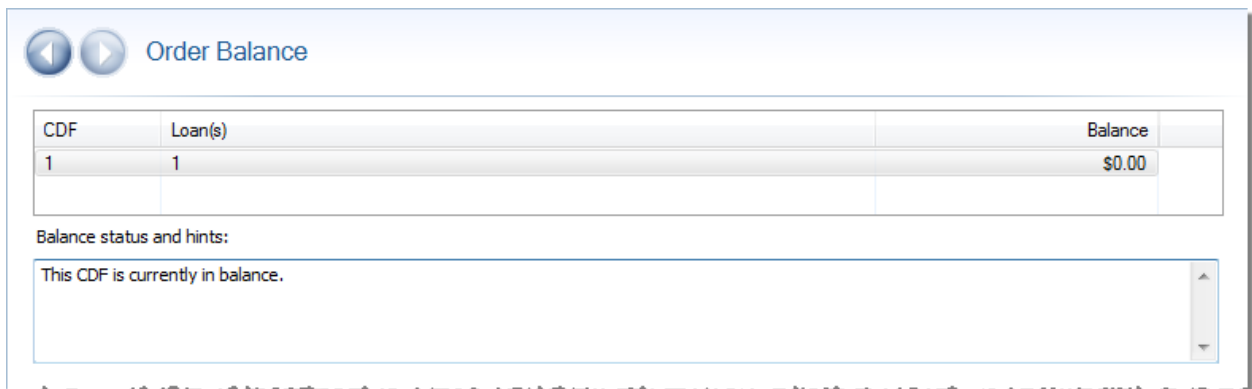
DISBURSEMENT DETAILS

To access the **Disbursement Details dialog**, you may double-click on the shaded area of any row in the Disbursements grid, or use the **Group...** hyperlink. See [section above](#) for details. The screen provides a convenient way to view, group, and ungroup disbursements:



- **HUD (read only):** Displays the HUD-1 number from which the receipt or disbursement was generated.
- **Code (editable):** Indicates the order contact code of the person or organization associated with the receipt or disbursement.
- **Name:** A hyperlink indicates the name of the person or company associated with the payee code selected.
- **Amount (editable):** The sum of the money being distributed or received to an individual or organization.
- **Separate:** Check to generate a separate disbursement for that individual or organization.
- **Group (editable):** Combines several disbursements into one disbursement to be distributed to one person or organization. The Group drop-down in the Disbursements grid is enabled only when there are other disbursements to the same order contact for the associated HUD, otherwise it is disabled. Once an item is selected and grouped with the other disbursements to that order contact, the amount will be changed to reflect the total disbursement to that order contact for that group check. Once the disbursements have been grouped for that order contact, the Details column will show a "group" hyperlink.
- **Details:** Indicates the source of the money to be distributed; click the hyperlink to jump to the HUD line.

Order Balance



Order Balance Information

This screen contains information about your order's balance. A message displays the current state of your order's balance. If your order is currently in balance, the message reads, "This HUD/CDF is currently in balance". If your order is out of balance, a message displays the total amount of incoming funds, the total amount of disbursements, and the difference between them. The difference between the incoming funds and disbursements equals the amount by which the order is out of balance.

To help you reconcile an out-of-balance situation, further information will be provided. Line items that may be causing your order to be out of balance will be listed along with the amounts they contain. Also, any grouped disbursements that are negative amounts will be listed along with the amounts they contain. "Grouped disbursements are displayed in the Disbursement details dialog for the contact on the [Order Transactions](#) screen. Depending on the state of your order, you may also receive other information. This information may include the total amount of deductions and a list of all line items which have a disbursement status of D (Deducted). Or, all line items which are included in the funding check may be listed, along with the total amount of the items. You will be alerted if the loan proceeds entered in the Loan Proceeds/Funding Amount field is short or over the amount received in the loan package check. Information will only be included in the message which may be contributing to an out-of-balance situation.

Here is an example of what you should see when the order is out of balance:

*This CDF/ HUD is not in balance:
Total incoming funds: \$175,000.00
Less total disbursements: \$180,000.00
Balance: (\$5,000.00)*

The following items may be causing this problem:

Lender Wachovia (L2): Deductions (\$6,000.00) exceed incoming funds (\$4,500.00) by a difference of \$1,500.00. Deductions are found on HUD line(s): 801, 802, 804, 806; in a CDF order, line(s) A.01, A.02, A.04, A.05.

Mortgage Broker Lending Tree (B): Deductions (\$3,000.00) exceed incoming funds (\$2,500.00) by a difference of \$500.00. Deductions are found on HUD line(s): 803, 807; in a CDF line(s) A.03, A.07.

Lender Wachovia (L2): Reductions (\$2,000.00) exceed disbursements (\$1,500.00) by a difference of \$500.00. Reductions are found on HUD line(s): 204; in a CDF line(s) L.04.

Press F12 to open a dialog with Order Balance information from anywhere within a ProForm order to give you quick, easy access to this detail. The grid will list all HUDs/CDFs present in the current order.

Policy Instructions

The Policy Instructions screen allows escrow users to communicate the status of the requirements and exceptions to the title users. The disposition codes can be used to specify how each requirement or exception was resolved, suggestions for the items that should or should not be included on the policy, and the items that should be modified.

The **Notes** fields allow the user to provide additional information about the requirement and/or exception that cannot be fully addressed by the disposition code. The title users are able to create the policy based upon the information provided on the Policy Instructions screen.

Commitment/Prelim: Select a commitment to which the policy instructions refer.

Estate/Interest: Select one of the following options from the drop-down to specify where the Estate/Interest information should come from:

- **From commitment:** Indicates that you should use the estate/interest data from the commitment.
- **From deed:** Indicates that you should use the Estate/Interest data from the deed to complete the policy.

- **See instructions:** Indicates that you should look to the Notes field for information regarding estate or interest for this transaction.

Notes: Enter any applicable notes about the estate or interest in this transaction.

Vesting: Select one of the following options from the drop-down to specify where the vesting information should come from:

- **From commitment:** Indicates that you should use vesting data from the commitment.
- **From deed:** Indicates that you should use the vesting data from the deed to complete the policy.
- **See instructions:** Indicates that you should look to the Notes field for information regarding the vesting for this transaction.

Notes: Enter any applicable notes about the vesting in this transaction.

Legal: Select one of the following options from the drop-down to specify where the Legal description should come from:

- **From commitment:** Indicates that you should use the legal data from the commitment.
- **From deed:** Indicates that you should use the legal description from the deed to complete the policy.
- **See instructions:** Indicates that you should look to the Notes field for information regarding the legal description for this transaction.

Notes: Enter any applicable notes about the legal description.

Requirements/Exceptions

This section enables someone working with escrow information to provide information to someone working with titles how the policy should appear based on how requirements and exceptions were entered. Someone working with escrows addresses each requirement or exception by selecting a disposition code, adding notes about how a requirement or exception was resolved, or if additional information needs to be added or modified.

Type: Exception or requirement.

Number: Number of the requirement or exception.

Code: Code of requirement or exception.

Description: Describes in more detail the requirement or exception.

Disposition Code: Disposition notes do not automatically affect a policy, they are informational only and are only used by someone working with titles to create a policy. Note: Disposition codes can be added in SPAdmin from Tools, then Drop-down List Editor.

Notes: Any notes entered about the requirement or exception appear here.

Include on Owner's Policy and **Include on Loan Policy:** The checkboxes impact the policy. If the Include on Owner's Policy and/or Include on Loan Policy is checked (even if they were not previously checked on the commitment), the policy will automatically include those exceptions on the policy. If a requirement has not been resolved and the include on Owner's Policy and/or Loan Policy is checked, the requirement will become an exception on the policy. If the checkboxes were previously checked when the commitment was created but Escrow un-checks them on the Policy Instructions grid the exceptions will not appear on the policy.

HUD Line Grid

Line	Description	Re	Disclosure	Borrower	Seller	HUD-1 To Co...	HUD-1 To Name
1101	Title services and lender's...						
1102	Settlement or closing fee						
1103	Owner's title insurance						
1104	Lender's title insurance						
1105	Lender's title policy limit						
1106	Owner's title policy limit						
1107	Agent's portion of the total...						
1108	Underwriter's portion of th...						
1109							
1110							

Description: Enter a description of this disbursement.

Re: Enter a memo or other note about this item. The contents of the Re field for a HUD-1 settlement statement line item prints on any check for that item. It also appears just to the left of the Borrower column for that item on the Laser HUD-1 settlement statement.

Note: For POC amounts up to \$9,999,999.00, the amount and the abbreviation POC appears in the Re field on any line in which a POC amount is entered. **Hint:** Select option #2 on the HUD-1 Options screen of the HUD-1 & Closing tab to display a b (for buyer/borrower) or s (for seller) entered along with the amount and the label POC in the Re field for a line item paid outside of closing. This can help identify which party paid the amount.

Partially POC amounts: If an amount is partially POC and the balance due is being collected at closing, enter the amount to be collected at closing in the Borrower or Seller column and manually enter the POC amount (with the abbreviation POC before it) in the Re field.

Borrower and Seller Columns: Enter the amount the Buyer/Borrower is to pay in the Borrower column. Enter the amount the seller is to pay in the Seller column. One or both of these amounts may be filled in automatically for you depending on information entered elsewhere in the file. You may type over amounts calculated automatically by ProForm, but be aware that doing so may cause your data file to be out of balance.

Format for Entering Amounts

When entering amounts into Borrower or Seller columns, including dollar signs or commas in the entry is unnecessary. For instance, to enter \$500.00, type 500. Decimal points are necessary to indicate amounts under \$1.00. For instance, to enter \$500.75, type 500.75.

Entering Amounts Paid Outside of Closing (POC)

When entering POC amounts into the Borrower or Seller column, input the correct amount and check the POC checkbox.

Note: For POC amounts up to \$9,999,999.00, the amount and the abbreviation POC appear in the Re field on any line in which a POC amount is entered.

HUD-1 To Code: Select an order contact code. This code defaults to the name that appears on the HUD-1 settlement statement as the payee for this fee.

HUD-1 To Name: Enter the name of the payee for this item.

Disclosure

Line	Description	Re	Disclosure	Borrower	Seller	HUD-1 To Co...	HUD-1 To Name
1101	Title services and lender's ...						
1102	Settlement or closing fee						
1103	Owner's title insurance						
1104	Lender's title insurance						
1105	Lender's title policy limit						
1106	Owner's title policy limit						
1107	Agent's portion of the total ...						
1108	Underwriter's portion of the...						
1109							
1110							

Disclosure: Any borrower amount that should appear outside the column on the HUD-1 Settlement Statement should be entered in the Disclosure amount field. To send an amount to a HUD-1 line as a disclosure amount, check the Disclosure checkbox. This appears outside of the column since it is included in a total line.

The Disclosure fields are only visible if the **Use 2009 RESPA regulations for HUD-1 & HUD-1A** option is checked. If an amount is sent to a HUD-1 line and there is a Seller Pay%, only the borrower's portion will be sent to the Disclosure amount if this checkbox is checked. Following are two examples of how the Disclosure checkbox functions:

1. If a \$100.00 disclosure charge is sent to line 1102 with a Seller Pay% of 10%, line 1102 appears with \$90.00 in the Disclosure column and \$10.00 in the Seller column.
2. If a \$100.00 charge is sent to line 1109 with a Seller Pay% of 10%, line 1109 appears with \$90.00 in the Borrower column and \$10.00 in the Seller column. If Disclosure is checked, the \$90.00 appears in the Disclosure column and the Borrower column will be blank.

Escrow Instructions

Data needed to create escrow instruction documents can be added directly into a ProForm order on the Escrow instructions screen. Escrow instructions are added based on user-defined instruction types. Each instruction can contain an unlimited number of phrases.

SPAdmin - Set Up for the Escrow Instructions Screen

PREFERENCE

The Escrow Instructions screen is visible in ProForm on the Escrow/Closing tab based on your profile assignment. To view the screen, check the "**Escrow instructions**" option under SPAdmin on the Profile Management Properties tab.

PERMISSIONS

You must have the escrow instructions permission to use the Escrow Instructions screen.

DROP-DOWN LISTS

To add escrow instructions and escrow instruction phrases, entries need to be added to the **Instruction Type** and **Phrase Group** drop-downs in SPAdmin Drop-down Lists. In order to manage instruction types and phrase groups, the drop-down lists "**execute**" permission must be granted.


Instruction Type: Contains the names of escrow instruction documents that need to be created, such as loan instructions, sale instructions, or amendments. A **Code** and **Description** are required and both must be unique. The entries in the Description column for instruction type appear in the Type drop-down on the Escrow Instructions screen when adding an escrow instruction.

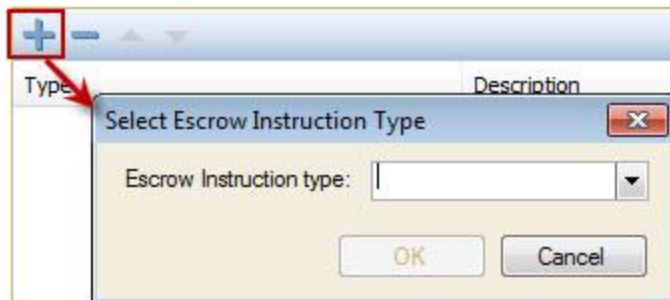
Phrase Group: Contains the headings used to organize phrases. The **Description** is required and must be unique. The entries in the Description column for a phrase group appear on the Escrow Instructions screen on the **Add Phrase** dialog in the Group drop-down. Groups are added to the Phrase tree in the order in which they are entered in the drop-down list.

PHRASE LOOKUP TABLE

Phrases can be added to the phrase lookup table in the lookup tables manager. A code and a description can be entered so that common phrases can be selected when adding a phrase to an escrow instruction.

Adding Escrow Instructions

1. Click  on the Escrow Instructions screen.
2. Select **Add Escrow Instruction** from the menu, or press the **Insert** key while in the grid.
3. The **Select Escrow Instruction Type** dialog appears.



4. Select an instruction type previously defined in the SPAdmin drop-down list.
5. Click **OK**.
6. The escrow instruction is added and the **Type** appears in the Escrow Instructions grid as well as on-screen. **Note:** The type cannot be edited after the escrow instruction has been added.
7. Enter a **Description** to distinguish multiple escrow instruction of the same type. For example, if there are 4 amendments, enter something about each amendment to make it unique so when rendering the document, the correct instance of the escrow instruction can be selected on the primary context dialog.

Description:

8. Select **Properties** related to that escrow instruction. By default, all properties are selected, but can be unselected if not related to that escrow instruction. There is a link to the Property screen through the Escrow Legal Description.


Properties:

Select	Property Address	Escrow Legal Description
<input checked="" type="checkbox"/>	123 Main St.	No Legal Description

Re-Ordering Escrow Instructions

Escrow instructions appear in the grid in the order in which they were added. To change this order, select the escrow instruction to move and click the up or down arrow button or use the corresponding item on the context menu to move the selected escrow instruction up or down.


Deleting Escrow Instructions

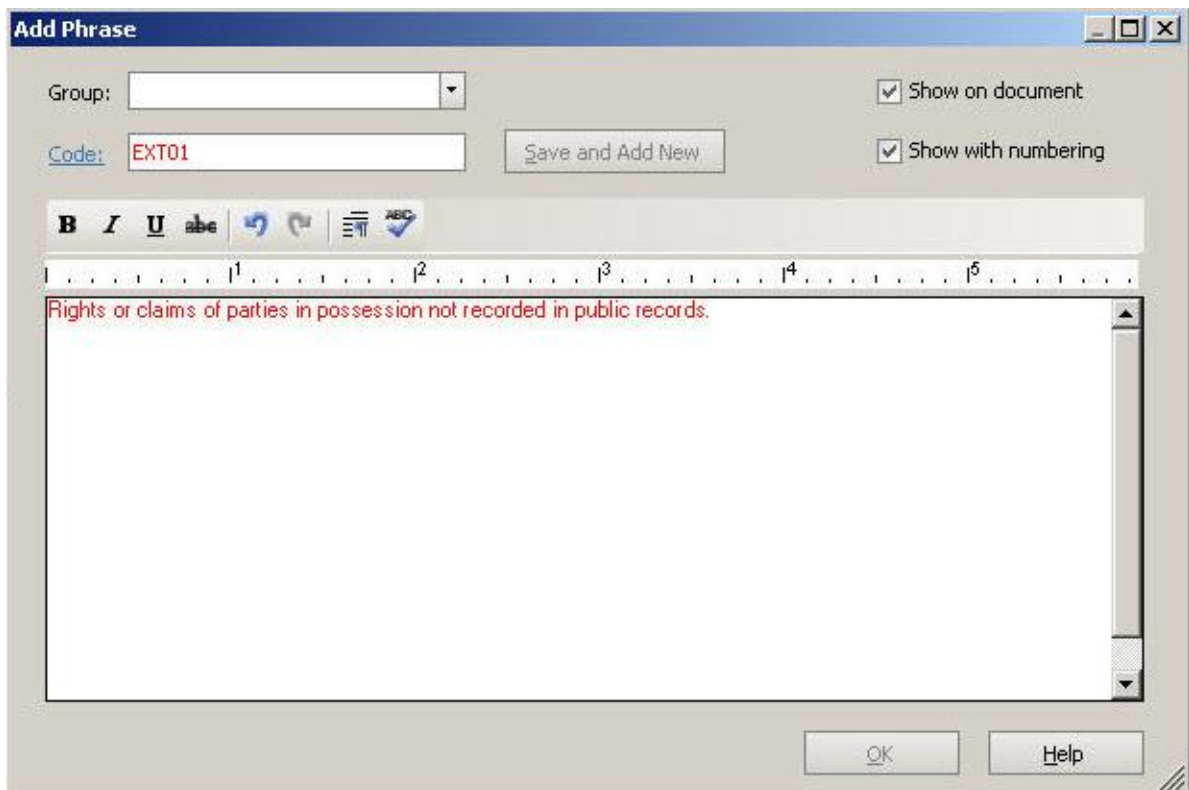
To delete an escrow instruction, select the escrow instruction in the grid and press , the **Delete** key or select **Delete Escrow Instruction** from the menu. A confirmation message appears when deleting an escrow instruction.

Adding Phrases

The phrase tree contains the list of phrases, or a to-do list for the escrow instruction to which they belong. An unlimited number of phrases can be added.

Select a numbering scheme for the phrases. Select from numbers, letter or roman numerals. This is the numbering scheme that appears in your documents.

1. To add a phrase, press , select **Add Phrase** or press the **Insert** key. The **Add Phrase** dialog appears.



2. A group is required. The group categorizes phrases and appear as top level nodes in the Phrases tree. When the phrase is added, the group that is selected is created in the Phrases tree. All phrases added with the same group appear under that group. Groups are added to the Phrase tree in the order in which they are entered in the Phrase Group drop-down list.
3. Select **Show on document** to include the phrase on the document. Select **Show with numbering** to display the number by the phrase in the tree and on the document. Both options are checked by default.
4. Add the text for a phrase by selecting a phrase from the lookup table or entering a phrase in the text box. Use the formatting buttons to format the text (in RTF format).
5. To select a phrase from the lookup table:
 - From the Code field, select a phrase from the lookup code (**F9** or click the **Code** hyperlink) to retrieve a phrase.
 - Click **Save** and **Add New** to add another phrase or **OK** to save and exit.

Editing a Phrase

To edit a phrase, double-click it or select **Edit Phrase**. Select a different group when editing a phrase and the phrase will be move to the new group. The **Save and Add New** button is not available on the Phrase dialog in edit mode.

Re-Ordering Phrases

To change the position of a phrase within its group, select the phrase and click the left, right, up or down arrow buttons or use the corresponding item on the context menu.

Copying and Pasting Phrases

Users can copy and paste phrases within the same group, across different groups and across escrow instructions. Users can copy and paste single phrases or all phrases within the same group.

COPYING PHRASES

To copy phrases, select **Copy Phrase** or press **Ctrl+C** when a phrase is selected in the tree. If a group is selected, then all phrases in that group will be copied. If a phrase is selected that has other phrases under it, then the selected phrase and all phrases under it are copied.

PASTING PHRASES

Single Phrase: to paste only the copied phrase, select where the phrase should be pasted. Select **Paste Phrase** (or press **Ctrl+V**).

Multiple Phrases: To paste the phrase that was copied and all phrases under it, select where the phrases should be pasted. Select **Paste Multiple Phrases** (or **Ctrl+Shift+V**).


Group: To paste a group that was copied, located where the group should be pasted. Select **Paste Group** (or **Ctrl+V**).

New group: If the phrases are pasted into a different group than they were copied from, the group field of all pasted phrases will be updated to reflect the group they are being pasted into.

Note: To paste phrases to a different escrow instruction, a group must exist before the phrases can be pasted.

Placement in tree: If a phrase is selected when pasting, all phrases are pasted as the next phrase on the same level as the selected phrase. If a group is selected when pasting, all phrases are pasted at the end of the group starting at the same level as the first phrase in the group.

PREVIEWING PHRASES

To preview a phrase, click the Preview Pane button  on the toolbar and then highlight the desired item. The preview pane will display the text and properties of that item. To close the preview pane, click the Preview Pane button again to hide the preview pane.

Rent Schedule Overview

Rent schedules are used in commercial or income property closings. In these types of closings, it is very typical that the property being conveyed has tenants. The rent schedule lists each tenant, their information, and the rent amount.

If the rent is paid, the seller is required to credit the buyer for any rents from the day of closing to the end of the rent period. If the rent is not paid, the buyer credits the seller because it is assumed the tenant will pay the buyer at a later time. These calculations are called the prorated rent and they are based off of the proration date, rent status, compute, and period. The customer is also able to enter a flat fee for late fees, deposits, and prepaid rent. These are typically not prorated since they are flat amounts. All of these fees are sent to a designated HUD line to be debited/credited to the appropriate parties.

Note: Each property has a separate rent schedule.

Rent Schedule is accessible from the **SoftPro Screens** left navigation pane in ProForm.

Tenant Information

Building: enter the building name/number in which the tenant resides

Mailing address: enter the mailing address of the tenant

City/State/Zip: enter the city, state and zip code of the mailing address of the tenant

Unit: enter the unit number in which the tenant resides

Tenant: enter the tenant name

Phone: enter the phone number (and extension, if applicable) for the tenant

Deposit/Prepaid Rent

Deposit: enter the deposit amount for this unit

Prepaid rent: enter the amount of prepaid rent made on behalf of this unit

Late fees: enter late fees, as applicable

Line: enter the HUD-1 lines to send the deposit, prepaid rent and late fees amounts are to be sent

Prorated Rent

Rent Status: select paid or unpaid

Compute: select Buyer's or Seller's share of the rent to compute

Share of rent: enter the rent amount

Period: select the period for which the rent should be prorated:

- Daily
- Weekly
- Bi-Weekly
- Semi-Monthly
- Monthly
- Quarterly
- Semi-Annually
- Annually

From: enter the beginning date of the proration period

To: enter the end date of the proration period

Days of: enter the number of days during the time period the proration is applicable

Per diem: enter the per diem amounts

30 day months: check to calculate based on a 30-day month

Prorated rent: auto-calculated amount based on proration data entered above

Line: enter the HUD-1 line to which the prorated rent amount should be sent

Prorated Rent Totals for All Units

Prorated Seller Credit: collective amount of any prorated rent paid by seller for all units

Prorated Buyer Credit: collective amount of any prorated rent paid by buyer for all units





Rent Schedule

Settlement date: The Settlement date field is a read-only field which defaults from the Settlement date/time field on the Order Information screen.

Rent proration date: The date defaults from the Proration date field on the Order Information screen. To manually change the date on the Rent Schedule screen, click the arrow and select a different date.

- Watch a video walk-through on [using prorations »](#)

Rent Schedules: Click a rent schedule in the grid to view it on the screen.

- To add a new rent schedule, click .
- To delete a rent schedule, click .
- To move records up and down in the grid, use  .

Tenant Information

Field	Description
Building	Enter the building name/number.
Unit	Enter the unit number of the rental property.
Tenant	Enter the tenant's name.
Phone	Enter the tenant's phone number. Note: When the Foreign checkbox has been selected, the Phone/Home/Fax/Cell/Pager number fields change,

allowing for a foreign formatted number to be entered. **Note:** If the foreign checkbox is checked, the field's format changes slightly to accommodate a foreign phone number (the area code parentheses and dash are removed and the field extends to 20 characters).

City/State/Zip Enter the city, state, and ZIP code of the rental property.

Foreign Check to use an address format other than a standard United States address format (e.g. an address in Mexico). Checking this box changes the City, State and ZIP code fields to one text box to enter the information.

Foreign Enter the foreign address. For example, if the address is:

address (text box) Sra. Otilia Ramos Perez
Urión 30
Col. Atlatilco
77520 CANCUN, Q. ROO
MEXICO

Check the **Foreign** checkbox and enter the address as follows:

Address:	Urión 30
	Col. Atlatilco
	77520 CANCUN, Q. ROO., MEXICO
	<input checked="" type="checkbox"/> Foreign

See [Spanish Characters](#) for more information.

Mailing Address Enter the mailing address of the rental property.

Deposit/Prepaid Rent

Field	Description
Deposit	Enter the amount of the deposit.
Prepaid rent	Enter the amount of the prepaid rent.
Late Fees	Enter the amount of late fees
CDF/HUD line	Select the appropriate CDF or HUD line from the drop-down list.

Prorated Rent

The following fields comprise the **Prorated Rent** section.

Rent Status: Select Paid or Unpaid from the drop-down list. **Note:** The default setting is Paid.

Option	Description
Paid	Selecting Paid will populate the Compute field with Buyer's .
Unpaid	Selecting Unpaid will populate the Compute field with Seller's .

Compute: Select Buyer's or Seller's from the drop-down list. **Note:** The default setting is Buyer's.

Share of rent: Enter the total rent amount to be prorated in the Share of rent field.

Period: Select the property rental period from the drop-down list. The **From** and **Through** fields will populate based on the period selected. However, **Bi-Weekly** will not auto populate because the start date of the original rent payment must be known to correctly calculate.

30 day months: Check this box when the month to be prorated has only 30 days.

From: Click the drop-down arrow and select a date.

Through: Click the drop-down arrow and select a date.

Days of: This field automatically calculates the number of days to be prorated.

Per diem: This field automatically calculates the per diem rate. You can also manually enter the per diem and the number of days will be calculated.

Prorated Rent: Enter the total amount due to the buyer or seller. It is calculated based on the Per diem x # of days (x days of). You can enter a number in X days of and a per diem and it will calculate.

CDF/HUD line: Select the appropriate CDF or HUD line from the drop-down list.

Prorated Rent Totals for all Units


Prorated seller credit: When computing the seller's share of prorated rent, this field defaults from the Prorated rent field.

Prorated buyer credit : When computing the buyer's share of prorated rent, this field defaults from the Prorated rent field.


Adding a Rent Schedule

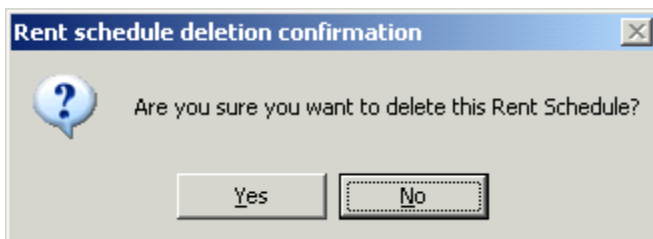
The **Settlement date** field is automatically populated from the settlement date in the Order Information screen.

The **Rent Proration** date field is read-only, and automatically populated from the proration date in the Order Information screen.

1. In the **SoftPro Screens** left navigation pane, select **Rent Schedule** from the **Escrow/Closing** Section.
2. In the **Rent Schedule** screen, click , or if adding a rent schedule for the first time, you can also press **Enter** (the **Add** button is highlighted). An entry is added to the grid.
3. Enter all the information in the Tenant Information section.
4. Enter the **Deposit/Prepaid Rent** information.
5. Enter all information in the **Prorated Rent** section.

Deleting a Rent Schedule

1. In the **Rent Schedule** screen, select the line to be deleted and click .
2. The **Rent Schedule deletion confirmation** dialog displays.



3. Click **Yes**. The rent schedule is deleted.

Prorating Rent

Prorated rent is calculated based on the Per diem x # of days (x days of). You can enter a number in X days of and a per diem and it calculates the value.

1. Select **Paid** or **Unpaid** from the **Rent status** drop-down. **Note:** When Rent status is set to Paid (the default value), the Compute field defaults to Buyers. When Rent status is set to Unpaid, the Compute field defaults to Sellers.
2. Enter the total rent amount to be prorated in the **Share of rent** field.
3. Select a value from the **Period** drop-down. Value selected from the drop-down affect the From, Through, and Per diem fields. **Note:** "Bi-weekly" does not fill in the From and Through fields.
4. Enter information in the **Prorated rent** field.
5. When selecting a CDF/HUD line and **Compute** is set to **Buyers**, the line drop-down is filtered to display the buyer credit.
 - For **HUD** orders, this is the **200** section; for **CDF** orders, this is **Section L**.
6. When selecting a CDF/HUD line and **Compute** is set to **Seller**, the line drop-down is filtered to display the seller credit lines.
 - For **HUD** orders, this is the **100** section; for **CDF** orders, this is **Section K**.

Prorated seller credit is the total of all credits to the seller for all rent schedules for a particular property. The prorated buyer credit is the total of all credits to the buyer for all rent schedules for a particular property.

Escrow Agreement

Funds to be paid to: Click the arrow to select the contact that will receive the Escrow Agreement funds.

Funds provided by: Click the arrow to select the contact that will provide the funds referenced in the Escrow Agreement.

Funds administered by: Click the arrow to select the contact that will manage the disbursement of the Escrow Agreement funds.

Funds held by: Click the arrow to select the contact that will hold the Escrow Agreement funds.

Agreement date: Enter the agreement date to appear on the Contract & Escrow for Completion Agreement.

Completion date: Enter the completion date to appear on the Contract & Escrow for Completion Agreement.

Private contract date: Enter the private contract date to appear on the Contract & Escrow for Completion Agreement.

Amount held, HUD-1, HUD-1 Line: Enter the amount held that appears on the Contract & Escrow for Completion Agreement. Click the arrow to select the HUD-1 line for the HUD-1 Settlement Statement on which the Amount Held in escrow will be shown. Click the HUD-1 Settlement Statement link next to the field to jump to the selected line.

Account information: Enter account information for the Contract & Escrow for Completion Agreement.

Escrow fee, HUD-1, HUD-1 Line: Enter the Escrow Fee that appears on the Contract & Escrow for Completion Agreement. Click the arrow to select the HUD-1 line for the HUD-1 Settlement Statement on which the Escrow Fee will be shown. Click the HUD-1 Settlement Statement link next to the field to jump to the selected line.

Bill code: If a bill code has been selected and an escrow fee is entered and sent to a HUD-1 line, the bill code also appears on the HUD-1 line. This field is tied into the existing Bill Codes preference and permission located in SPAdmin.

Terms & conditions: Use this scrollable field to enter terms and conditions to appear on the Contract & Escrow for Completion Agreement.

Additional instructions: Use this scrollable field to enter additional instructions to appear on the Contract & Escrow for Completion Agreement.

Seller Proceeds and 1099-S

Typically a Form 1099-S is required when a transaction consists in whole or in part of the sale or exchange for money, indebtedness, property or services of any present or future ownership in any of the following:

1. Improved or unimproved land, including airspace;
2. Inherently permanent structures, including any residential, commercial, or industrial building;
3. A condominium unit and its appurtenant fixtures and common elements, including land; and
4. Stock in a cooperative housing corporation.

Exceptions include:

1. Sale or exchange of a principal residence for \$250,000 or less (\$500,000 or less if married filing jointly) and an acceptable written assurance is received from the seller.
2. Any transaction in which the transferor is a corporation; a governmental unit, including a foreign government or an international organization; or an exempt volume transferor.
3. Any transaction that is not a sale or exchange, including a bequest, gift and a financing or refinancing that is not related to the acquisition of real estate.
4. A transfer in full or partial satisfaction of a debt secured by the property, including a foreclosure, a transfer in lieu of a foreclosure or an abandonment.
5. A de minimis transfer for less than \$600.

Seller Proceeds and 1099-S Screen

The first section in the Seller Proceeds and 1099-S screen displays the 1099-S related data for each seller in an order. In the second part of the screen, the Payee section, a seller's proceeds can be disbursed to another party or split up money into different checks.

Note: A warning message appears if the transaction type is a purchase and the escrow status is **closed** and any of the required fields are missing:

- Seller first name

- Tax ID/SSN
- Seller address
- Seller City
- Seller State
- Seller ZIP code
- Firm file ID
- Gross proceeds amount
- settlement date
- Legal description

Exclude order from IRS submission: Check this option to prevent title only or single-side closings from being exported to 1099 and reported to the IRS.

1099-S description (editable): The description field defaults to "**property address**", but if the property address information is blank, then it defaults to the "**Escrow Brief Legal**" field.

Total cash to sellers: The total amount of cash to be given to the seller(s).

Divert seller proceeds to line: Use this field to divert the seller's proceeds to a CDF/HUD-1 line. Select the appropriate CDF/HUD-1 line, description and amount. **Next available Seller Debit (500 section)** is the first option. CDF Sections H and N are available lines in CDF orders and HUD-1 lines 506-509, 513-519 are available in HUD-1 orders. Click the hyperlink next to the drop-down to view or edit the line.

Total buyer's part of real estate taxes: The real estate tax paid in advance that is allocable to the buyer. For example, a residence is sold in a county where the real estate tax is paid annually in advance. The seller paid real estate taxes of \$1,200 for the year in which the sale took place. The sale occurred at the end of the 9th month of the real estate tax year. Therefore, \$300 of the tax paid in advance is allocated to the buyer, by reference to the amount of real estate tax shown on the CDF/HUD-1 as paid by the seller in advance.

Name: Name of the seller.

Percentage of Total (editable): The percentage of the proceeds for each seller.

Cash to Seller: The dollar amount to be disbursed to each seller.

1099-S Proceeds: The gross proceeds reported on the 1099-S for each seller. Gross proceeds means any cash received or to be received for the real property by or on behalf of the transferor, including the stated principal amount of a note payable to or for the benefit of the transferor and including a note or mortgage paid off at settlement.

Buyer's Part of Real Estate Taxes (editable): The total buyer's part of real estate taxes times the percentage of total for each seller. For example: The total buyers part of real estate taxes = \$500.00. If there are 5 sellers in an order, the percentage would be 20% for each seller. So the buyer's part of real estate taxes for each seller is 20% of \$500.00, or \$100.00.

Property Services Received (editable): Select this checkbox if the seller received services in lieu of or in addition to money.

1099-S Provided (editable): Select this checkbox if the seller was provided with a 1099-S form at closing.

1099-S Signed (editable): Select this checkbox if the seller's signature was obtained at closing in acknowledgement of receiving a 1099-S form.

Exempt from 1099 Reporting (editable): Select this checkbox if the seller is exempt from 1099-S reporting. Since corporations are normally exempt from 1099 reporting, this checkbox is inactive if the seller type is either flagged as Corporation or Other.

Payees

Code: Select a contact type from the drop-down list. Defaults to the Seller contact selected in the Seller grid above.

Name: A drop-down list indicating the name of the person or company associated with the payee code selected. Select an individual name and a separate disbursement will be generated for that person.

%: Auto-calculated to the percentage of the payee amount based on the total of the amount. By changing the percentage it reduces the amount going to the first party and then allows the selection of one or more parties to pay the remaining balance to. **Note:** The number entered cannot be greater than 100.

Amount: Defaults to the Cash to Seller amount. Editing the amount creates a new row for the difference. Adding an amount to a new row subtracts the difference from the previous row.

HOA Charges and Prorations

Users can enter homeowner association (HOA) related assessments, prorate single or multiple HOA charges for properties, prorate HOA charges for one or more properties, prorate dues between buyer and seller, enter a single-sided charge for a buyer or seller and prorate dues based on a specific time period.

Entering New Charges and Prorations

To enter a new charge or proration, click the **Add** button. Enter a description, borrower, seller, HUD-1 line and to whom the charge applies. Proration fees are calculated in the **Proration calculation** section.

Property: Defaults to 1 for the first CDF or HUD. If multiple CDFs/HUDs have been added to the order, this drop-down is used to switch between them.

Description: Enter a description of the charge or proration.

Credit/Debit: The default is checked.

- **When checked**, and a 100/400 section line is chosen (or, for CDF orders, a line in Section K/M), the charge is a debit to the buyer and a credit to the seller. When checked, and a 200/500 section line is chosen (or, for CDF orders, a line in Section L/N), the charge is a credit to the buyer and a debit to the seller.
- **When unchecked**, the charge is sent as a single-sided credit or debit depending on the CDF/HUD-1 line selected.

Line: Select the appropriate **CDF** or **HUD-1** line for the charge or proration.

Disclosure: This checkbox only appears on HUD-1 orders, and is only visible if the **Use 2009 RESPA regulation for HUD-1 & HUD-1A** option is checked. If this field is checked, the borrower amount appears in the Disclosure amount field for the selected HUD-1 line. If this field is unchecked, the borrower amount appears in the Borrower amount field for the selected HUD-1 line.

Borrower: Enter the amount the buyer or borrower is to pay. Calculate this amount by using the **Proration calculation** fields.

Seller: Enter the amount the seller is to pay. Calculate this amount by using the **Proration calculation** fields.

To: Select an order contact to appear as the payee on the selected HUD-1 line when **Credit/Debit** is unchecked.

PRORATION CALCULATION

Compute: Select Buyer's or Seller's from the drop-down list. **Note:** The default setting is Buyer's.

Share of: Enter the total amount to be prorated in the Share of field.

Proration date: Enter a proration date; this defaults from the **Proration date** field on the **Order Information** screen.

Period: Select the period from the drop-down list. The **From** and **Through** fields populate based on the period selected. However, **Bi-Weekly** does not auto-populate because the start date must be known to correctly calculate.

From/Through: Click the drop-down arrow and select a date.

Days of: This field automatically calculates the number of days to be prorated.

30 day months: Check this box when the month to be prorated has only 30 days.

Per diem: This field automatically calculates the per diem rate. Manually enter the per diem and the number of days also calculates.

Options

CDF

The following information describes the options available for CDF orders.

- **Use optional Closing Disclosure forms for transactions not involving seller:** Select this option to use the optional CDF Page 3 screen which shows Section K. Payoffs and Payments grid and the optional Calculating Cash to Close table. This option is typically used with refinance transactions.
- **Sort CDF page 2 lines descriptions alphabetically on order save:** Uncheck this option to disable the automatic sorting of CDF Page 2 lines.
- **Print POC codes:** Defaults checked. Causes the POC (paid outside of closing) codes B (buyer/borrower), S (seller), L (lender), or T (third-party) entered along with the amount and the label POC in the Re field for a CDF Page 3 line item paid outside of closing.
- **Use Buyer/Seller Split Feature:** Select this option to automatically reduce a calculated buyer amount by the amount entered in the seller amount field, or reduce a calculated seller amount by the amount entered in the borrower amount field. For calculated or sent over amounts on a CDF Page 2 charge, the Use buyer/seller split feature will force a balance only between Borrower-Paid At Closing with Seller-Paid At Closing, and Borrower-Paid Before Closing with Seller-Paid Before Closing. It will not force balance Paid at Closing with Paid Before Closing or Paid by Others.
- **Use Individual Settlement Statement rules to calculate buyer/seller receipts and disbursements:** When this option is unchecked, the buyer receipts and disbursements are calculated by multiplying the buyer's interest % by the total cash due from/to buyers. The seller receipts and disbursements are calculated by multiplying the seller's proceeds % by the total cash due from/to sellers.

- When this option is checked, the buyer receipts and disbursements are calculated by using each CDF line payor grid code to determine if the amount is split between all buyers (BA) or only one individual buyer (B, B2, etc.). For example, if one buyer (B) is responsible for paying a fee on line H.01, select "B" in the payor code to indicate that buyer 1 is responsible for paying the total charge on line H.01. The total of each buyer's credits minus each buyer's debits is calculated to determine the individual total due from/to each buyer. The same calculation applies for sellers when this option is checked.
- **Note:** Since rounding must be done on each individual debit or credit amount, the total due to/from each buyer/seller may be several cents different. This variance depends on the number of buyers/sellers that are in the order, each buyer's interest percentage or seller's proceeds percentage, and the amounts on each CDF line.
- **Use individual buyer codes for receipts and disbursements:** When this option is unchecked, the amount due to/from buyers appears as a single receipt or disbursement to all buyers (BA). When this option is checked, the amount due to/from each buyer appears as separate receipts or disbursements to each buyer (B, B2, etc.).
- **Use individual seller codes for receipts and disbursements:** When this option is unchecked, the amount due to/from sellers appears as a single receipt or disbursement to all sellers (SA). When this option is checked, the amount due to/from each seller appears as separate receipts or disbursements to each seller (S, S2, etc.).
- **Print additional disbursements from broker's commission:** Checking this will print details of commissions disbursements to a 3rd party on the CDF Attachment page; a new ReadyDoc has also been added which may be used if this option is not checked.
- **Print Settlement Agent logo on Settlement Statements:** Select this option to print the logo associated with the Settlement Agent contact in the order at the top of the Settlement Statements

Print signatures

- **Print signatures:** specify whether or not print signatures should be printed on the Order Balance Sheet, Estimated Settlement Statement, and/or the Final Settlement Statement.

Title - CDF section defaults

This set of drop-down lists provides the user with a central location from which they may set CDF line defaults for title fees. These can be adjusted easily and will affect all fees without needing to go to each fee individually. Note: It is strongly recommended that CDF line defaults be set with these options. See Title section CDF line dropdowns for other methods used to select CDF lines

OWNER'S POLICIES

Owner's policies, owner's policy guaranty and recoupment fees, and owner's policy endorsements reference this option to determine which section to default their CDF Line to.

- If this option is changed, calculated CDF Line dropdowns will default to the next available line in the newly selected section, but user-entered CDF Line dropdowns will remain the same, whether or not they were manually selected or populated from a lookup table.

- **Options:** Other Charges, Services Borrower Did Not Shop For, and Services Borrower Did Shop For.

ALL OTHER TITLE FEES

Loan Policies, loan policy guaranty and recoupment fees, loan policy endorsements, commitment endorsements, and Additional Title Charges reference this option to determine which section to default their CDF Line to.

- If this option is changed, calculated CDF Line dropdowns will default to the next available line in the newly selected section, but user-entered CDF Line dropdowns will remain the same, whether or not they were manually selected or populated from a lookup table.
- **Options:** Services Borrower Did Not Shop For, Services Borrower Did Shop For, and Other Charges

GROUP ENDORSEMENTS

It is strongly recommended that users control selecting the CDF line via the Title - CDF section defaults options. If Endorsements need to be grouped in any way other than the grouping available with the Group Endorsements options here, the user must do this manually by selecting the same line in all CDF Line dropdowns.

None: Choose this default option if you want each endorsement to be itemized. The CDF Line for each Endorsement will default to the next available line in the same section as the parent policy. When selected:

- **Loan Policy Endorsements:** Will be sent to the same CDF that the parent policy is being sent to.
 - If the parent policy is not being sent to the CDF, then the section selected will be the one selected in the “All other title fees” dropdown, and
 - The CDF selected will be the one associated to the Loan tied to the parent policy.
- **Owners Policy Endorsements:** Will be sent to the same CDF that the parent policy is being sent to.
 - If the parent policy is not being sent to the CDF, then the section selected will be the one selected in the “Owner’s policies” dropdown, and
 - The CDF selected will be the first CDF.
- **Commitment Endorsements:** will be sent to the section selected in the “All other title fees” dropdown, and to the first CDF.

Same Line As Parent Policy: Choose this default option if you want endorsements to be grouped on the same CDF line as its parent policy. When selected,

- **Loan & Owner’s Policy Endorsements** default the CDF Line to the same line selected on the parent policy.
- **Commitment Endorsements** default the CDF Line to the next available line in the All other title fees section on the first CDF. Endorsements on the same commitment will be sent to the same line.
- **Endorsements** will not default a CDF Line until the parent policy has a CDF Line.

Separate Line From Parent Policy: Choose this default option if you want endorsements associated to the same policy type to be grouped together in the same CDF section as the policy. When selected,

- **All Endorsements belonging to the same title product** will be grouped on the next available line in the appropriate section. For example, all endorsements for the first Loan Policy will be grouped together on the same CDF line in the same section that contains the first Loan Policy.

- **The CDF and the section** will be determined for each product (Loan Policy, Owner's Policy, and Commitment) following the rules described in the "None" section above.

Place of Settlement

- **Address:** This field can be used to store the location where the settlement/closing occurs; it will print on ALTA Settlement Statements.

Administrative Data

- **CDF Page 1-5:** Users may input information here that is specific to an order or their company; this data will show as a footer on CDF Page 1 - 5 documents.

HUD-1

The following information describes the options available for HUD orders.

Use 2009 RESPA regulations for HUD-1 & HUD-1A: Check to specify that this is the 2009 version of the HUD-1 or HUD-1A Settlement Statement instead of the 1986 version. When this option is selected, Escrow/Closing screens reflect the necessary fields required to produce the 2009 HUD-1/HUD-1A Settlement Statement. An Edit permission is associated with this checkbox. If permission is granted and the option is changed in an order, an entry is written to the order history log. Once checked, a confirmation message, "**Modifying this option may remove amounts from 800-1300 and 1500 sections. Do you want to continue?**" appears. Click **Yes** to continue with the 2009 version. Click **No** to continue with the 1986 version.

Use HUD-1A rules for refinances, equity lines, etc.: Select to use the HUD-1A Form for refinances and equity loans.

Place code ('B', 'S', 'L', or 'T') in generated POC descriptions: Select to have a **B** (buyer/borrower), **S** (seller), **L** (lender), or **T** (third-party) entered along with the amount and the label POC in the Re field for a line item paid outside of closing.

Use buyer/seller split feature: Select this option to automatically reduce a calculated buyer amount by the amount entered in the seller amount field, or reduce a calculated seller amount by the amount entered in the borrower amount field.

For example: Enter a loan amount and 1% origination fee on line 801 to calculate the borrower amount, then enter \$100.00 in the seller amount field, and the borrower amount automatically be reduced by \$100.00 when this option is selected.

Show deposit/earnest money as required in RESPA regulations: Select to have the full amount of commission shown on Line 703 and nothing show on Line 506. Use this option with discretion. It is a requirement of RESPA regulations to show the deposit retained on Line 506.

If the settlement agent, listing agent, or selling agent retains the deposit, and this option is selected, the deposit does not show on Lines 506, 701, or 702 (Line 703 shows the full amount of commission).

Note: The deposit is represented on the Disbursement Summary and on checks as retained.

Print approval signature lines on Order Balance Sheets: Check to print signature lines on the Order Balance Sheets (documents found in the ReadyDocs folder), if unchecked no signature lines print.

Use Individual Settlement Statement rules to calculate buyer/seller receipts and disbursements: When this option is unchecked, the buyer receipts and disbursements are calculated by multiplying the buyer's interest % by

the total cash due from/to buyers. The seller receipts and disbursements are calculated by multiplying the seller's proceeds % by the total cash due from/to sellers.

When this option is checked, the buyer receipts and disbursements are calculated by using each HUD-1 line payor grid code to determine if the amount is split between all buyers (BA) or only one individual buyer (B, B2, etc.). For example, if one buyer (B) is responsible for paying a fee on line 1109, select "B" in the payor code to indicate that buyer 1 is responsible for paying the total charge on line 1109. The total of each buyer's credits minus each buyer's debits is calculated to determine the individual total due from/to each buyer. The same calculation applies for sellers when this option is checked.

Note: Since rounding must be done on each individual debit or credit amount, the total due to/from each buyer/seller may be several cents different. This variance depends on the number of buyers/sellers that are in the order, each buyer's interest percentage or seller's proceeds percentage, and the amounts on each HUD-1 line.

Use individual buyer codes for receipts and disbursements: When this option is unchecked, the amount due to/from buyers appears as a single receipt or disbursement to all buyers (BA). When this option is checked, the amount due to/from each buyer appears as separate receipts or disbursements to each buyer (B, B2, etc.).

Use individual seller codes for receipts and disbursements: When this option is unchecked, the amount due to/from sellers appears as a single receipt or disbursement to all sellers (SA). When this option is checked, the amount due to/from each seller appears as separate receipts or disbursements to each seller (S, S2, etc.).

HUD (Letter/Large Print)

Page **Final and Estimated**

Page 1 **Signature lines:** Select to have buyer/borrower and seller signature lines printed on Page 1 of the HUD-1 settlement statements.

Signature lines w/acknowledgment: N/A

1099 solicitation: N/A

Page 2 **Signature lines:** Select to have buyer/borrower and seller signature lines printed on the HUD-1 settlement statements.

Signature lines w/acknowledgment: N/A

1099 solicitation: N/A

Page 3 **Signature lines:** Select to have buyer/borrower and seller signature lines at the bottom of the Last Page of the HUD-1 settlement statement.

Signature lines w/acknowledgment: N/A

Note: This option is not available when the "Use 2009 RESPA regulations for HUD-1 & HUD-1A" checkbox is not selected.

Attachment **Signature lines:** Select to have buyer/borrower and seller signature lines at the bottom of the attachment to the HUD-1 settlement statements.

Signature lines w/acknowledgment: Select to include acknowledgment language along with the buyer/borrower and seller signature lines on the attachment to the HUD-1 settlement statements.

1099 solicitation: Select to include 1099-S solicitation language along with the buyer/borrower and seller signature lines on the attachment to the HUD-1 settlement statement.

HUD (Legal)

Page	Final and Estimated
Page 1	<p>Signature lines: Select to have buyer/borrower and seller signature lines printed on Page 1 of the HUD-1 settlement statements.</p> <p>Signature lines w/acknowledgment: Select to include acknowledgment language along with the buyer/borrower and seller signature lines on the HUD-1 settlement statements.</p> <p>1099 solicitation: Select to include 1099-S solicitation language along with the buyer/borrower and seller signature lines on the HUD-1 settlement statements.</p>
Page 2	<p>Signature lines: Select to have buyer/borrower and seller signature lines printed on the HUD-1 settlement statements.</p> <p>Signature lines w/acknowledgment: Select to include acknowledgement language along with the buyer/borrower and seller signature lines on the HUD-1 settlement statements.</p> <p>1099 solicitation: Select to include 1099-S solicitation language along with the buyer/borrower and seller signature lines on the HUD-1 settlement statements.</p>
Page 3	<p>Signature lines: Select to have buyer/borrower and seller signature lines at the bottom of the Last Page of the HUD-1 settlement statement.</p> <p>Signature lines w/acknowledgment: Select to include acknowledgement language along with the buyer/borrower and seller signature lines on the HUD-1 settlement statements.</p> <p>Note: This option is not available when the "Use 2009 RESPA regulations for HUD-1 & HUD-1A" checkbox is not selected.</p>
Attachment	<p>Signature lines: Select to have buyer/borrower and seller signature lines at the bottom of the attachment to the HUD-1 settlement statements.</p> <p>Signature lines w/acknowledgment: Select to include acknowledgment language along with the buyer/borrower and seller signature lines on the attachment to the HUD-1 settlement statements.</p> <p>1099 solicitation: Select to include 1099-S solicitation language along with the buyer/borrower and seller signature lines on the attachment to the HUD-1 settlement statement.</p>

Master Settlement Statement

Page	Final and Estimated
Last Page	<p>Signature lines: Select to include buyer/borrower and seller signature lines at the bottom of the Last Page of the master settlement statements printed using this file.</p>

Text to be printed on the bottom of HUD-1, page 2: Enter text to print at the bottom of page 2 of the HUD-1 settlement statement.

Show additional disbursements from broker's commission: These options are specifically used for documents. If there are disbursements from the broker's commission to a third-party:

- Select **Page 2** to show disbursements on page 2 of the HUD-1 settlement statement
- Select **Attachment** to show disbursements on a separate attachment to the HUD-1 settlement statement
- Select **None** to keep third-party disbursements from printing on the HUD-1 settlement statement.

Print settlement agent signature on HUD-1: Select one of the following from the drop-down list: None, Page 1, Page 2, Page 3 or Attachment.

Include acknowledgment: Select this option to include the acknowledgment with the settlement statement.

Print tax proration disclosure on Buyer/Seller Certification: Select one of the following from the drop-down list:
Never, Only when tax status is to be paid by Buyer, Always regardless of tax status.

"The buyer and seller understand that the tax prorations shown on the settlement statement are": Enter text to be included on the Buyer/Seller Certification. This information only appears on the Buyer/Seller Certification if **Always regardless of tax status** is selected or **Only when tax status is to be paid by Buyer** is selected and the taxes are paid by the buyer on one or more of the tax screens.

Task Summary Overview

Task Summary	
Total Orders	1
Total Tasks	2
<i>Rush Orders</i>	3
<i>Overdue Tasks</i>	4
Tasks Due Today	5

[VIEW >>](#)

The Task Summary includes [checklist tasks](#) and [requested tasks](#), which are a cumulative list of items that need to be completed for an order. Tasks are accessible as actions items on the Order tab:



Checklist Tasks Overview

The screenshot shows a 'Checklist Tasks' window with a table and a form below it.

Status	Task	Occurs	Due Date	Assigned To	Completed Date	Completed By
Required	Survey	Pre-closing	09/26/2014 12:00 AM	Administrator		
N/A	Pest Inspection	Pre-closing	10/02/2014 12:00 AM	Default Admin Account	09/19/2014 10:26 AM	Default Ad...
Completed	Payoff 2nd Mortgage	Pre-closing	09/26/2014 12:00 AM	Default Admin Account	09/19/2014 10:26 AM	Default Ad...






Below the table is a form with the following fields:

- Occurs: Pre-closing, Post-closing
- Task: Pest Inspection
- Due: 10/02/2014 12:00 AM
- Completed: 09/19/2014 10:26 AM
- Status: N/A
- Assigned to: Default Admin Account
- Completed by: Default Admin Account

A checklist task item is a task that is usually completed in-house such as the deed preparation, title examination, issuance of a title commitment or policy, or the recording of documents.

Checklist Tasks

The screenshot shows the software interface with the 'Checklist Tasks' button highlighted in a red box. The interface includes a toolbar with various icons and a menu bar with options like 'ProForm', 'ProTrust', 'Pro1099', 'SPImage', 'SPAdmin', and 'Order'.

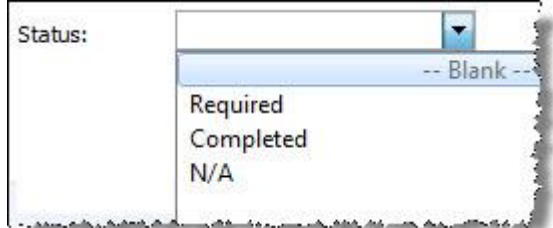
- Click  to add a task to the checklist tasks grid. When data is entered into the fields below the checklist tasks grid, the information automatically updates.
- After entering the initial checklist task, additional tasks can be entered by clicking . Continue this process until all checklist tasks have been entered.
- To delete a task from the checklist tasks grid, highlight the task to be deleted and click .
- **Note:** Right-click anywhere in the checklist tasks grid to add or delete a task.
- The order in which the tasks are viewed can be adjusted by using the up/down buttons  on the toolbar.
- The tasks may be sorted alphabetically by task name by using the **sort button** .
 - If clicked, this button will sort BOTH the Checklist and [Requested Tasks](#) screens.
 - This button only affects the items present in the grid at the time that the button is pressed.
 - When tasks are manually ordered using the arrow buttons, they will stay in that order.

- Adding a new task manually or via Workflow will put the new task at the bottom of the list. If the user wants to move those tasks, they'll have to click the sort button or up/down buttons again.

Occurs: Select **Pre-closing** or **Post-closing** to designate the time frame of the task in the closing process.

Task: Enter the description of the task in Task field. **Note:** Enter the most commonly used task descriptions into a template for future use.

Status: Select **Required**, **Completed** or **N/A** from the drop-down list.



When the Status is changed to N/A, the Completed date and by fields on Checklist Tasks and the Received date and by fields on Requested Tasks are filled with the current date/time and user.

The **N/A status** denotes that a task is not applicable to the current order. Managers and administrators can prevent users from deleting tasks and can see by whom and when the task was marked N/A. My Orders and Start Page task counts exclude tasks with status N/A. The SoftPro Order Tasks reports do not show tasks with the N/A status.

Due: Click the drop-down arrow to select the date this task is due and enter a time.

Assigned To: Enter the name of the individual to whom this task is assigned. **NOTE:** The default is the current user name.

Completed: Click the drop-down arrow, select the date this task was completed and enter a time. **NOTE:** Select Completed from the Status drop-down and the Completed field defaults to the current system date and time.


Completed by: Enter the name of the individual that completed this task. **NOTE:** Select Completed from the Status drop-down and the Completed by field defaults to the current system user.


Transaction Point: Select **Attach Documents** or **Viewing Privileges** from the drop-down list.


Option	Description
Attach Documents	Use this option to attach ReadyDocs to tasks.
Viewing Privileges	Use this option to set viewing privileges for docs posted to Transaction Point.

Notes

Use the **Notes** are for miscellaneous comments concerning the task. By default, the **Notes** grid is hidden.

To add a note, click  OR right-click in the **Notes** field and select **Add Note**.


To delete a note, click  OR right-click in the **Notes** field and select **Delete Note**.

To search, click  OR right-click in the **Notes** field and select **Search**.


Adding a Checklist Task

A checklist task is a task that is typically completed in-house such as the deed preparation, title examination, issuance of a title Commitment or Policy, or the recordation of documents.

Note: In previous versions of ProForm, a checklist task was referred to as a checklist track item.

1. Click the **Checklist Task** screen tab.
2. In the **Checklist Tasks** screen, click . An entry is added to the grid.
3. Select **Pre-closing** or **Post-closing** to indicate when the task will occur.
4. Enter a description of the task in the **Task** field.
5. Select **Required**, **Completed** or **N/A** from the Status drop-down list.
6. Select a **Due** date and enter a time.
7. Select the person the task is assigned to.
8. If the task is completed, select the completed date and enter a time if applicable.

Editing a Checklist Task

1. Select a task in the checklist task grid.
2. Change or add information in the fields below the grid. As information is entered in the fields, the checklist task grid will populate with the updated information.
3. Click  to save changes to the order.

Deleting a Checklist Task

Select the task to be deleted in the grid and click .

Note: A warning message displays asking if you are you sure you want to delete the task. To continue, click **Yes**. If you selected the wrong task or changed your mind, click **No**.

Requested Tasks

A requested task item is a task that is usually requested from an outside source such as a survey, pest inspection, or payoff.

Requested Tasks

Status	Task	Occurs	Assigned To	Request Due	Task Due	Received
Required	Flood insurance	Pre-closing	Default Admin Acco...	09/26/2014 12:00 AM		
Received	Prepare Deed	Pre-closing	Default Admin Acco...	10/07/2014 12:00 AM		09/19/2014 10:29 AM
Requested	Survey	Pre-closing	Default Admin Acco...	09/22/2014 12:00 AM		
N/A	Review	Pre-closing	Default Admin Acco...	09/24/2014 12:00 AM		09/19/2014 10:31 AM

Occurs
 Pre-closing
 Post-closing

Task:

Status:


Assigned to:

Requested
Due:
Requested: By:

Received
Due:
Received: By:

Details
Request via: Fee:
Line: Disclosure
Contact:

Adding a Requested Task

1. Click on the **Requested Task** screen tab.
2. In the **Requested Tasks** screen, click the Add  button. An entry is added to the grid.
3. Under **Occurs**, select **Pre-closing** or **Post-closing** for when the task will occur.
4. Enter a description of the task in the **Task** field.
5. Select **Required**, **Requested**, **Received** or **N/A** from the **Status** drop-down list.




6. Select the person the task is assigned to.
7. Select the date the request is due and enter a time. Additionally, select the requested date, enter a time, and select the name of the person that requested the task.
8. Enter a description of how the request was issued (for example, phone).
9. Enter the fee amount.
10. Select the contact from the drop-down or add a new contact by clicking **Add New** at the bottom of the drop-down list.


11. Select the HUD line from the drop-down.
12. Select the date the task is due and enter a time.
13. Once received, select the date the task was received, enter a time, and select the name of the individual that received the task.

Note: Multiple tasks can be added to the order.

Editing a Requested Task

1. Select a task in the **requested task grid**.
2. Change or add information in the fields below the grid. As information is entered in the fields, the requested task grid will populate with the updated information.
3. Click  to save changes to the order.

Deleting a Requested Task

A requested task may be deleted in three ways: select the task to be deleted in the grid and a) click , b) right-click and select Delete Task from the pop up menu or c) click the Delete key on your keyboard.

Note: A Task Removal Confirmation dialog displays asking if you are you sure you want to delete the task. To continue, click **Yes**. If you selected the wrong task or changed your mind, click **No**.

Order Contacts

All parties in an order, such as the Abstractor, Appraiser, Buyer/Borrower, Seller, Lender, Settlement Agent, and Underwriter, are entered on the **Order Contacts** screen in ProForm. Regardless of the type of contact you want to add, you will do so by accessing the **Order Contacts** screen in ProForm first.

Order Contacts Screen

The **Order Contacts** screen displays all of the contacts involved with the order. The contacts appear in a grid with column headings showing key information about each contact (Marketing Source, Type, Name, Code, Phone, Fax, Main Contact, Email, Address). By default, contacts are sorted by Type. To view detailed information for a contact, double-click the contact in the grid.



- To add a new contact, click **Add Contact (Insert)**. See [Adding an Order Contact](#) for more information.
- To delete a contact, select it and click **Delete Selected Contact(s) (Delete)**. See [Deleting an Order Contact](#) for more information.

- To send an e-mail to a contact, select it and click **E-mail Selected Contact(s)**. See [E-mail Order Contacts](#) for more.
- When an "Other" order contact is added, the Contact type appears in parenthesis beside the "Other" type. For example, if an "other" contact is added to an order with a "Contact type" of "Radon Inspector", then the contact type column in the Order Contracts grid and all order contact dropdowns, appear as "Other (Radon Inspector)".

Note: You can select multiple contacts to delete or e-mail.

People

You can add contact information for specific individuals at a Mortgage Broker, Lender, or other office using the People grid when you add or edit a contact.

Contact Details

Contact Type

For other contacts, enter the type of contact you are adding. There are several [default contact types](#) available to choose from the Lookup table.

Default Contact Types

Code	Description
AB	Abstractor
BA	All Buyers
SA	All Sellers
AP	Appraiser
AT	Attorney
B	Buyer/Borrower
GC	General Contractor
G	Government
HOA	Home Owner's Association
HMC	HOA Management Company
HI	Home Inspector
L	Lender

LB	Listing Agent/Broker
LS	Loan Servicer
M	Mortgage Broker
O	Other
P	Payoff Lender
PI	Pest Inspector
Q	Qualified Intermediary
S	Seller
SB	Selling Agent/Broker
A	Settlement Agent
SC	Subcontractor
SU	Surveyor
T	Title Company
U	Underwriter

When a person is added as the first person for that contact, then the Main contact checkbox default is "checked". Uncheck this if the person is not the main contact.

The screenshot shows a dialog box titled "Add Person to Escrow Inc". It contains several input fields: "Lookup code:", "Courtesy title:", "First:", and "Middle:". There is also a "Copy from SoftPro user:" dropdown menu. A checkbox labeled "Main contact" is checked, and this checkbox is highlighted with a red rectangular box.

Type: Select an entry to describe this buyer/borrower. **Note:** When an Attorney order contact is added, the "Represents" contact code now appears in parenthesis beside the "Attorney" type. For example, if an attorney contact is added to an order with BA selected in the Represents field, then the contact type column in the order contracts grid, and all order contact dropdowns, appear as "Attorney (BA)":

Type	Name	Code	Phone
Attorney (BA)	Michael M. Mitchell-Mabry	AT	
Buyer/Borrower	Robert R. Buyer	B	
Escrow Company	Escrow Inc	E	
Seller	Samantha D Seller	S	

Trade: Use the link to select the given trade for a contact. **Note:** applies to Subcontractor only.

Lookup Code: Enter a code to retrieve a contact from the Lookup table. **Note:** See Lookup Tables for more information about using Lookups.

Copy from SoftPro user: If applicable, you may select an internal employee from the drop-down list. All available contact information will auto populate.

Name, Payee Name, Address, City/State/Zip: Enter the name and location for the contact. The name defaults to the entry made in the Name field.

Name: This is the combination of names from the above individual name (First, Middle, Last and Suffix) fields. This information can be overridden.

Short Name: This field defaults from the **Name** field and can be overwritten with an abbreviated version of the **Name** for any documents where there are space limitations for the name. For CDF Orders, this field is used on Page 5 in the Contact Information section

Name long: When the name is entered in the first name field, the name automatically populates in this field. This is a combination of all the name fields (First, Middle, Last and Suffix). This information may also be overridden.

Vesting: Enter a Look-up table code in this field to fill in the Vesting text. This field automatically populates if an entry is retrieved from the Lookup table for the proposed insured lookup code.

Foreign: Check to use an address format other than a standard United States address format (e.g. an address in Mexico). Checking this box changes the City, State and ZIP code fields to one text box to enter the information.

Foreign address (text box): Enter the foreign address. For example, if the address is:

Sra. Otilia Ramos Perez
 Urión 30
 Col. Atlatico
 77520 CANCUN, Q. ROO
 MEXICO

Check the **Foreign** checkbox and enter the address as follows:

Address:

 Foreign

See [Spanish Characters](#) for more information.

SSN: If you have limited permissions, you can enter the Social Security number, but once you exit the screen and come back, the SSN field only displays **XXX-XX-1234** (only the last four digits of the SSN appear).

Proceeds: Enter the percentage of the 1099-S proceeds from the closing to be disbursed to this seller. **Note:** The sum of all of the percentage fields must equal 100%. By default, the proceeds will be divided equally among all sellers. The percentages entered in these fields will appear in the Percentage of Total column on the Division of Proceeds & 1099-S Data screen of the HUD-1 & Closing tab.

Forwarding address: Displays the following options: Same as property address, Same as current address, and blank. This applies to buyer and seller order contacts.

Name 1, 2, Current and Forwarding Information: Enter the current and/or forwarding information for the Work phone/Ext., Home phone, Fax, Cell, Pager, E-mail address and Driver's license #.

Buyer 1, 2 A.K.A.: Enter any variation of the buyer/borrower name to appear on the name affidavit.

Interest language: Enter the vesting language to appear on documents such as Warranty Deeds and some Deeds of Trust (for example, as to an undivided 100% interest, or as to an undivided 1/2 interest). The Look-up table contains several entries you can choose from to fill this field. This applies to buyer and seller order contacts.

Interest: Enter the percentage of ownership interest the buyer has in the property. **Note:** The sum of all the buyers "Interest" percentage fields must equal 100%. By default the interest percent will be divided equally among all buyers.

Phone: Enter the contact's phone number. All phone number fields can accommodate up to 20 characters. When a 10-digit number is entered auto formatting will occur by adding the area code parentheses and dash.

Fax: Enter the fax's phone number.

E-mail address: Enter the e-mail address of the contact.

Include on revenue reports: Any disbursements to this order contact should be included on revenue reports. This field is available for all order contacts except Buyers and Sellers.

Marketing source: Click Marketing source if this contact is the source of business for the order.

Marketing rep (2 and 3): Marketing Representative fields can be used in different ways. For example, enter the name of the sales representative with your firm that solicits business from the settlement agent. The field could then be used to track sources of business. Or, use it to hold the name of the sales contact at the settlement agent.

Order Ref. #: Enter the number that the contact uses to refer to this order.

Phone, Fax, Home: Enter corresponding phone numbers as needed.

Tax Type: Select from the applicable option from the drop-down list.

NMLS #: On CDF Orders, the **Nationwide Mortgage Licensing System ID number** appears on Attorney, Escrow Company, Lender, Listing Agent, Loan Servicer, Mortgage Broker, Other Contact, Selling Agent, Settlement Agent, Title Company, and Underwriter contacts.

ALTA Universal ID: This unique number is assigned by ALTA and appears on ALTA Settlement Statements.

Tax ID/SSN: Enter the Federal Tax Identification Number (TIN) in the following format: 12-3456789. Note: The TIN will be used for IRS 1099-S processing. It prints in Section H of the HUD-1 Settlement Statement.

1099-M: This checkbox will appear as checked or unchecked based on the tax type selection.

License #: Enter a license number; for CDF orders, this item will display on CDF Page 5 on the "License ID" row. Does not apply to Buyers/Sellers.

State of incorporation: Specify the state in which the contact was incorporated.

Contractor: Use the drop-down list to select a code for the order contact to be listed as the Contract Owner. **Note:** Applies to General Contractor, Subcontractor, and Other Contact.

Contract amount: Enter a construction draw contract amount for the selected contact. **Note:** Applies to General Contractor, Subcontractor, and Other Contact.

Agency ID: Enter the agency number. This field applies to Underwriters only.

Claim Address, City/St/Zip, Phone, Fax: Enter the address, phone, and fax numbers of the office where claim information should be sent. These fields apply to Underwriters only.

Funding Address, City/St/Zip, Phone, Fax: Enter the lender's funding address and contact information. Note: These fields default to the same information entered in the Payee Name Address, Phone, and Fax fields. These fields apply to Lenders only.

Legal Name: Use this scrollable field to enter the lender's full legal name. This field applies to Lenders only.

Proposed insured clause: Indicates how the lender appears on the loan policy.

Vesting/Loss payable: Indicates the clause provided by the lender that will be in the hazard insurance.

Signature Line: Enter the title or other information to appear on a signature line for this contact. This applies to Settlement Agents, Title Companies, and Underwriters.

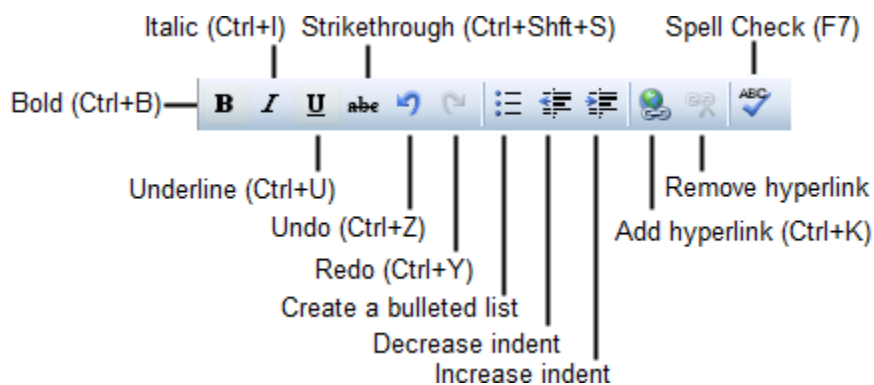
Logo image: The Logo image field is where you can insert the contact's logo to appear on documents. This applies to Settlement Agents, Title Companies, and Underwriters.

Seal image: The Seal image field is where you can insert the contact's seal to appear on documents. This applies to Settlement Agents, Title Companies, and Underwriters.

<input type="button" value="Browse..."/>	Browse for an image file to insert
<input type="button" value="View Image..."/>	View the logo image in a larger viewer
<input type="button" value="Clear"/>	Clear the image

Commitments: Click the arrow and select a commitment to view.

Directors and/or Officers: Enter the names of the directors and/or officers to be printed on the Commitment for Title Insurance Schedule D (Texas form T7). You can type information directly into the field and use the **toolbar** to format text, add bullets, indent, and spell check.



Disclosures: Type information directly into the field and use the toolbar to format text, add bullets, indent, and spell check.

Divert fees to: The following option is available for the following contacts: Attorney, Escrow Company, Government, Other, Settlement Agent, Title Company and Underwriter. When this field is populated, any disbursements due to the order contact currently being viewed will be grouped with the disbursements to the

selected contact and will show as one disbursement on the Order Transactions screen and the ProForm Register. The disbursement on the Order Transactions screen displays the amount due to each contact.

Sales tax reporting

Description (CDF orders only): information input here will appear as the default description on the CDF line where sales tax is calculated; defaults to "Sales Tax" but can be manually overwritten.




Tax rate: Enter the applicable tax rate. This option is visible only if the Sales tax preference has been checked in Preferences in SPAdmin. The purpose of this is so a contact can charge sales tax on their fees. **For example**, a settlement agent may charge 3% sales tax on their fees in the applicable HUD-1 or CDF section. Anywhere they have a settlement agent contact in the To Code and "taxable" is checked, calculates the sales tax. Two options include:

- **Tax is included in HUD-1/CDF amount:** Select if the sales tax is already included in the charge amount. Since the amount on the line already includes sales tax, selecting this option separates the fee from the sales tax in the payee grid on that line.
- **Calculate total tax on line/CDF section:** Select to calculate sales tax on the selected line/section. **For example**, if a settlement agent charges a 3% sales tax on their fees, then any fees with the **To** code of "A" which also have "taxable" checked, will calculate 3% of the total fees and put that amount on the specified line/section.

Bill code: Select a bill code (such as CAN – cancellation fees, or ESC – escrow fees) to associate it with the sales tax amount for the order contact.

People

Store information about individuals at the contact business using the People grid. See [Order Contacts](#) for more about the People grid. **Note:** Multiple people can be selected for deletion or for e-mail purposes.

	Add person	Add a new person	Insert
	Delete person	Delete a person	Delete
	E-mail selected people	Send e-mail to a person	

Outgoing Wire Information

Each of the following fields is alphanumeric and the maximum length is 50 characters. Fields are not required, but once entered here, these fields default in the Outgoing Wire dialog.

Bank name: Enter the name of the bank.

ABA routing number: Enter the routing number.




Credit account name: Enter the name of the account holder. If a Payee name has been entered, it will default to this field.

Credit account number: Enter the account number.

Special instructions: Enter any specific instructions.

Further credit: Enter further credit information.

Notes: Use this field for notes about the contact. The Notes grid can store multiple notes about the contact created by different users. Each row in the grid displays information about a note, including the note's creation, the last modified date, and the note text. Double-click a note to expand it. See [Order Notes](#) for more about the Notes grid.

	Add	Add item	Insert
	Delete	Delete selected item from the grid	Delete
	Search	Search the notes grid for text	

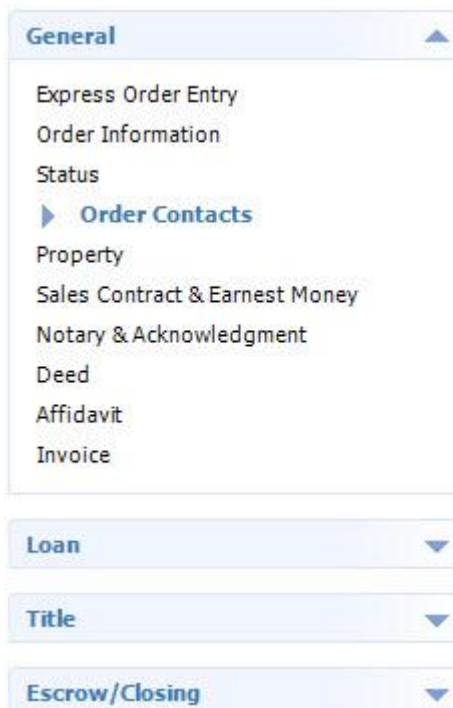
Adding an Order Contact


The **Order Contact** screen in ProForm is where users enter and manage information for all parties to the order.

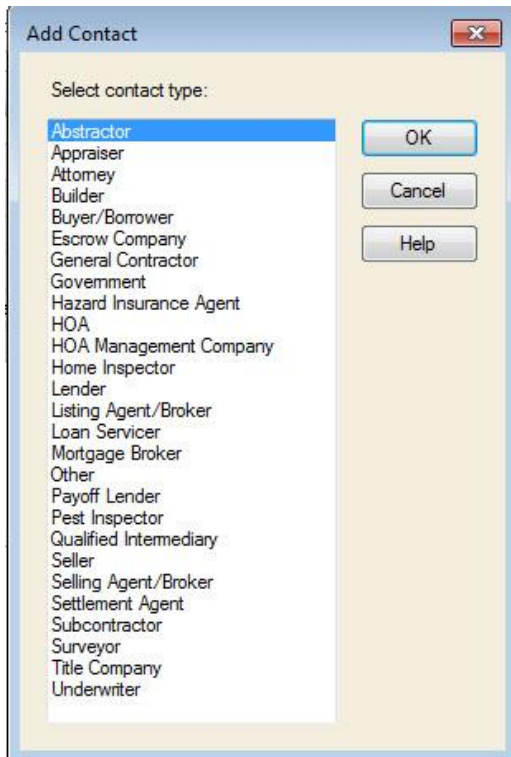
1. Click the ProForm **Program Tab**.



2. Select **General**, then **Order Contacts**.



3. Click **Add Contact (Insert)** .
4. The **Add Contact** dialog appears. Select the type of contact to add. For example to add a buyer, select **Buyer/Borrower**.



5. Click **Ok**.
6. A new screen opens on the desktop to enter contact information.

Deleting an Order Contact

1. Click the ProForm **Program Tab**.



2. Select **General**, then **Order Contacts**.

General ▲

- Express Order Entry
- Order Information
- Status
- ▶ **Order Contacts**
- Property
- Sales Contract & Earnest Money
- Notary & Acknowledgment
- Deed
- Affidavit
- Invoice

Loan ▼


Title ▼

Escrow/Closing ▼

3. Select the contact to delete. For example:

Type	Name	Code	Phone	Fax	Main Contact	Email	Ad
Buyer/Borrower	Robert R. Buyer	B			Robert R. Buyer	robrbuyer@email.com	
Seller	Samantha D Seller	S			Samantha D Seller	samanthadseller@email.com	

Note: Use the CTRL and SHIFT keys to select multiples.

4. Click the **Delete Selected Contact(s)** button .
5. Click **Yes**.

Note: Contacts referenced on another screen cannot be deleted. For example, a settlement agent that is selected on the **Escrow Agreement** screen as the funds administrator cannot be deleted. In this case, change the funds administrator to another entity before deleting the settlement agent.

In another example, a contact that is designated as a payee on the HUD-1 Settlement Statement cannot be deleted. In this case, disburse the funds to another entity before deleting the contact.

Emailing Order Contacts

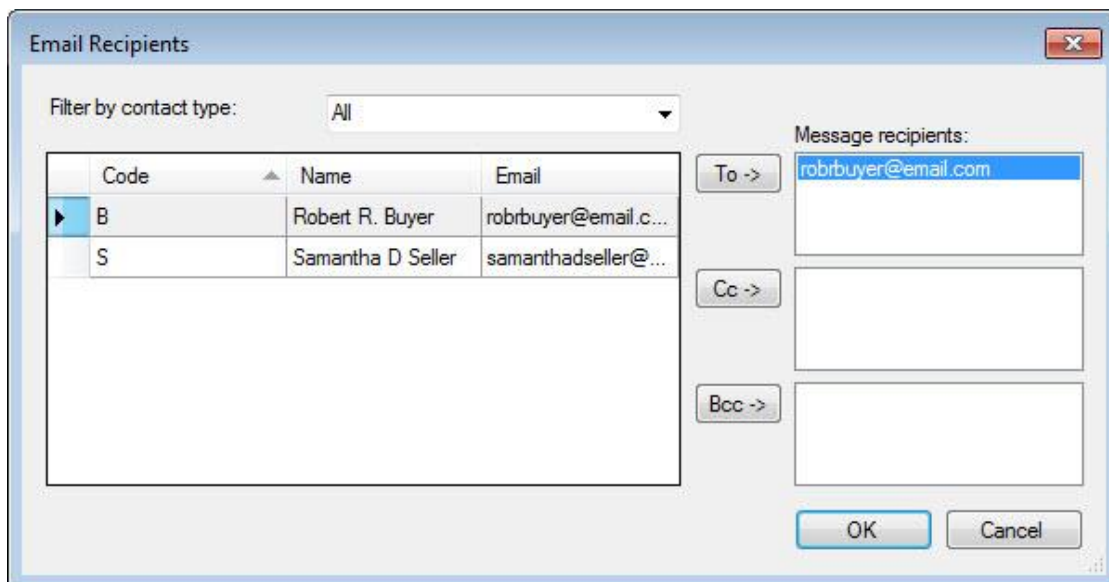
1. Click the ProForm [Program Tab](#).



2. Select the **Order Contacts** screen.
3. Double-click on the desired contact from the Order Contacts grid. (Buyers and Sellers do not currently contain this option.)
4. From the **People** grid, click the **Email** icon.

Type	Name	Code	Phone	Fax	Main Contact	Email
Buyer/Borrower	Robert R. Buyer	B			Robert R. Buyer	robrbuyer@email.com
Seller	Samantha D Seller	S			Samantha D Seller	samanthadseller@email.com

5. The **Email Recipient** dialog appears. Any person with an email address entered for that order contact shows in the **Contact** pane.



6. Highlight the desired recipient and click the **To**, **Cc**, or **Bcc** button to move them to the recipient window. Click **Ok**.
7. A new email appears with the selected addressees, any chosen attachments and containing the Order number, buyer, and seller names (as applicable) as the subject line.
8. Enter any additional message and click **Send**.

Formula Editor

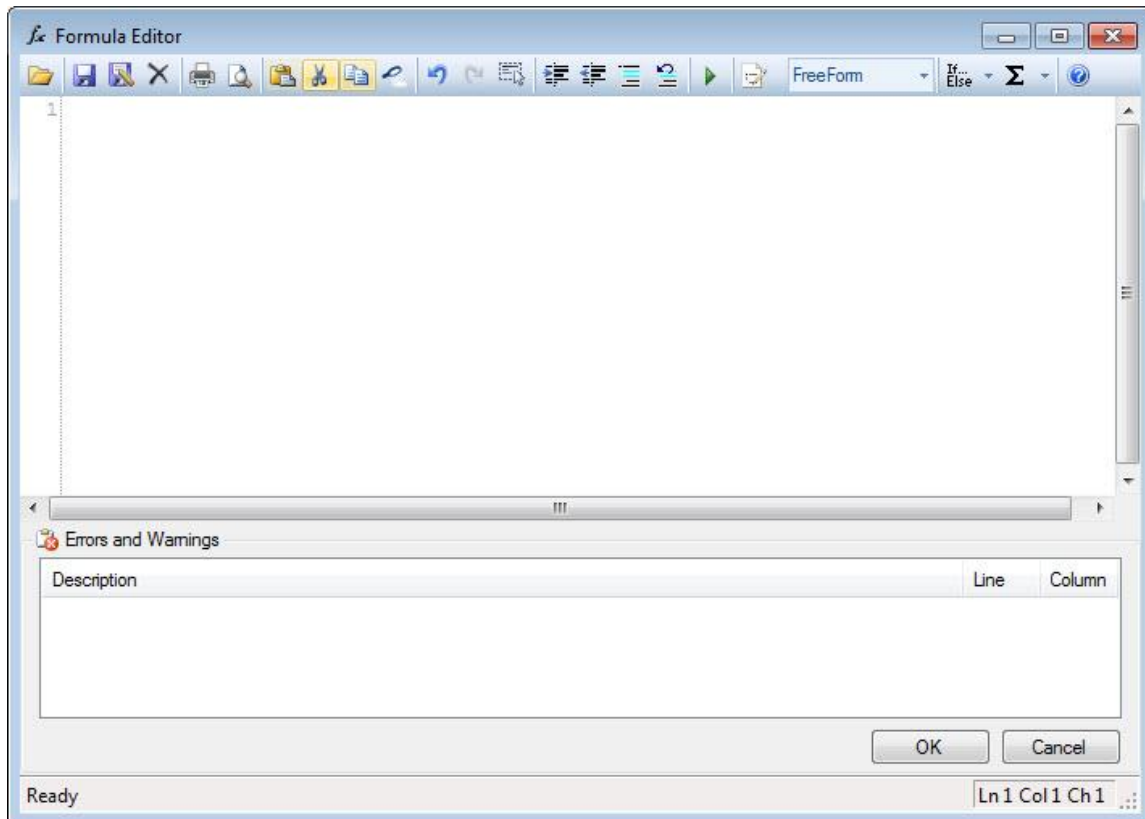
Enter defined formulas and calculations using the formula editor. Select from a pre-defined formula or enter an undefined free-form version. Enter the free-form formula in the text editor.

Note: Custom fields are referenced in the formulas. All functionality related to formulas available for common fields is also available for all types of custom fields.

Accessing the Formula Editor

To access the Formula Editor:

1. Press **F8** from any editable field (excludes system-generated or unavailable fields). The Formula Editor window appears.
2. If **Free Form** was selected, enter the formula in the text field.



3. Select **None** from the drop-down list to remove formulas from fields.
4. Click the green arrow button on the toolbar to execute the formula. A description, along with the time it took to compile the formula, will appear in the Errors and Warnings panel on the bottom of the dialog.
5. Click Ok.

Entering "TaskDueDate" Formulas

Use the pre-defined TaskDueDate in the formula editor to create calculations in the **Checklist** and **Requested Task Screens Due Date** fields. Parameters change depending on if it is a **Requested Due Date**, **Requested Task Received Due Date**, or **Checklist Task Due Date**.

Select **TaskDueDate** from the drop-down. Enter the information in the parameters. For example, enter a requested due date of 7 days after the order is received,

and the formula appears as the date in the **Due** field as follows:

Entering "RateTableCalc" Formulas

Use the pre-defined RateTableCalc in the Formula Editor to create calculations using specific rate tables.

Parameters include **Rate table** and **Charge based on** drop-downs and **Amount**, and **Multiplication %** fields.

- **Rate table:** Displays a list of active current premium rate tables (name and version).
- **Charge based on:** Includes sales price, other, loan amount and policy coverage amount. The list varies based on the field. **Sales Price** and **Other** are always available. Loan Amount is available on Endorsements, Loan Policy, Additional Title Charges, and Title Insurance Premiums. Policy Coverage Amount is available on Endorsements, Policy, and Additional Title Charges.
- **Amount:** Defaults amount based on selection in **Charge based on** drop-down. This field is disabled unless **Other** is selected.
- **Multiplication %:** Defaults as **100.00** and allows user modifications.

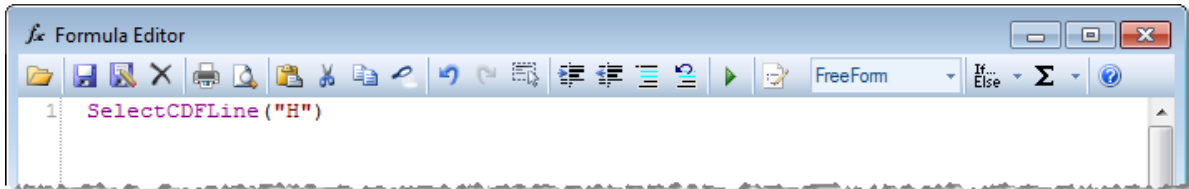
From the drop-down menu, select **Free Form** or a **pre-defined formula**.

Entering SelectCDFLine() Formulas

For CDF orders only, the user may assign a CDF section and Line number via a new **SelectCDFLine()** formula

function. **Note:** Access the formula editor by using the **F8** key.

- The formula can be used in **templates** and in the **CDFLine** column in a **lookup table**.
- Using this formula will prevent a lookup entry from selecting the CDF Line before the charge is ready to be sent to the CDF, and it will prevent unrelated charges from defaulting to the same CDF Line.
- **For example**, in order to select the next available **Section H** line when the entry is retrieved into the order, the CDF Line column would need this formula:



- When the charge is actually ready to be sent to the CDF, the next available CDF Line in **Section H** will populate.

Allowed parameter values for the **Formula Editor** and text fields in the **Policy Manager**:

Allowed Value	Example
SectionLetter	B
SectionLetter.	B.
SectionLetterNumber	B01
SectonLetter.Number	B.01
SectionLetter<space>Number	B 01
SectionLetterNumber, no leading zero for the number	B1
SectionLetter.Number, no leading zero for the number	B.1
SectionLetter<space>Number, no leading zero for the number	B 1

See also: [Formula Editor Toolbars](#)

Documents

ReadyDocs are documents that print directly from ProForm. Examples include Invoices, Payment Information Letter and Settlement Statements.

- Watch a video walk-through on [rendering CDF settlement statements »](#)

Accessing Documents

In order to access the default document tree in ProForm, the user's profile must be assigned to that ReadyDoc tree. Under **SPAdmin\Configuration\Documents and Reports**, select **ReadyDoc Trees**. Highlight the Default tree (or other desired tree) and double-click to access the tree's properties dialog. Under the **Profiles** tab, click on the **Assign Profiles** button (or use keyboard shortcut **Alt+P**) to access the Assign Profiles dialog. Select the desired profile and click **OK**. Click **OK** out of the tree's properties dialog to save changes.

There are also Permissions settings within SPAdmin that control what documents from within the tree the user may view, access, edit and publish. See [ProForm Permissions](#) to access the descriptions of the various ReadyDocs permission settings available in SPAdmin.

Documents Tab

To access the Documents screen, open a ProForm order and click on the **Order** tab. Click the **Documents** action icon (or use keyboard shortcut **Ctrl+D**) from within the Order Tools to access the Documents screen.



DOCUMENT TOOLS

Accessing the Documents screen enables the [Document Tools](#) tab. The Document Tools can be used to preview, navigate and publish documents from multiple orders in ProForm as well as modify the fonts, content, margins and settings of documents.

DOCUMENT SELECTION

Back: This button will become enabled once the second document of the batch has been previewed, allowing the user to go back to a previously viewed document in the set.

Next: Click the Next button to initiate the document preview and to navigate to the next document in the set.

Distribute: This button will bring up the documents [Distribution screen](#), allowing users to print, save or email the document.

ORDER SELECTOR

The left side of the screen displays the order selection area. The order selector will display any currently open orders - once an order has been selected for document association, the navigation pane will display information about the order such as property, buyer name, seller name, etc.

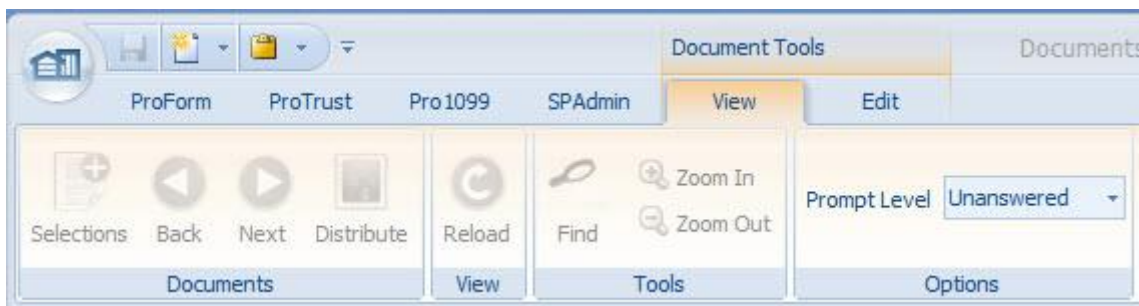
AVAILABLE READYDOCS

The Available ReadyDocs pane displays those documents trees, defined under the Profiles settings in SpAdmin, that the user has available for viewing and distribution.

SELECTED READYDOCS

The Selected ReadyDocs pane displays those documents that the user has chosen to preview and/or distribute from the Available ReadyDocs pane.

View Ribbon



DOCUMENTS

Selections: This button is used to cancel the rendering process of the document batch and return the user to the Document Selection screen.

Back: This button will become enabled once the second document of the batch has been previewed, allowing the user to go back to a previously viewed document in the set.

Next: Click the Next button to initiate the document preview and to navigate to the next document in the set.

Distribute: This button will bring up the documents [Distribution screen](#), allowing users to print, save or email the document.

VIEW

Reload: This button is enabled once the first document is previewed. If a change was made to the order that the document is tied to, this button can be used to reload the document and incorporate any pertinent changes made to the order.

TOOLS

Find: This button may be used to find specific text within the document being previewed.

Zoom In: Click this button to zoom in one level.

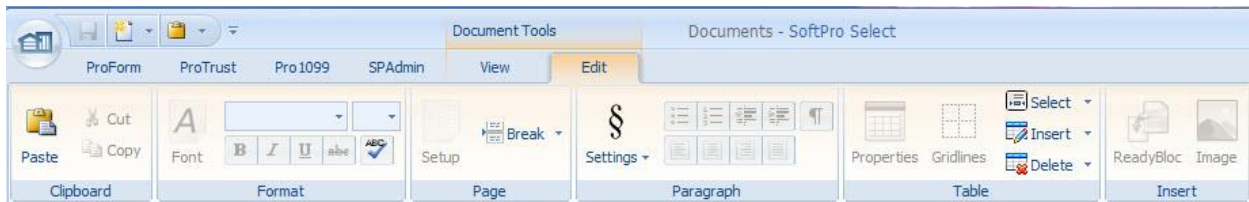
Zoom Out: Click this button to zoom out one level.

OPTIONS

Prompt Level:

- **None:** Click to prevent displaying any custom field prompts.
- **Unanswered:** Click to display only custom field prompts that have not been answered.
- **All:** Click to display all custom field prompts.

Edit Ribbon



CLIPBOARD

Paste: Click this button to paste the clipboard contents.

Cut: Click to cut the selection and put it on the clipboard.

Copy: Click to copy the selection and put it on the clipboard.

FORMAT

Font: Select to show the font settings dialog.

Font Family: Use the drop-down to select the font face.

Font Size: Use the drop-down to change the font size.

Bold: Click to make the selected text bold.

Italic: Click to make the selected text italicized.

Underline: Click to make the selected text underlined.

Strikethrough: Click to draw a line through the middle of the selected text.

Spell Check: Click to check spelling.

PAGE

Setup: Click here to show the page setup dialog to modify settings such as margins, orientation, etc.

Break: Click here to insert a page break or a section break.

PARAGRAPH

Settings: Click to modify paragraph settings, set tab stops or format bullets and numbering

Bullets: Click to start a bulleted list

Numbering: Click to start a numbered list

Outdent Items: Click to decrease the indent level of the paragraph.

Indent Items: Click to increase the indent level of the paragraph.

Paragraph Markers: Click to show paragraph markers

Align Left: Click to align text to the left.

Align Center: Click to center the text.

Align Right: Click to align text to the right.

Justify: Click to align text to both the left and right margins.

TABLE

Properties: Click to open the table properties dialog box and change settings such as row and column number and width, borders and shading, etc.

Gridlines: Click to show or hide table gridlines.

Select: Click to select a cell, row or entire table.

Insert: Click to insert a cell, row or entire table.

Delete: Click to delete a cell, row or entire table.

INSERT

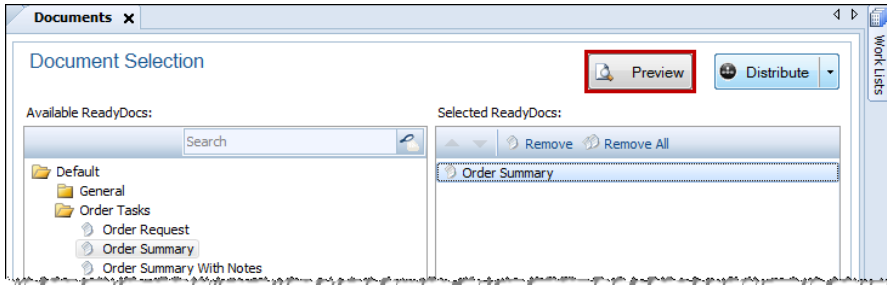
ReadyBloc: Click to insert a RdyBloc into the document.

Image: Click to insert an image into the document.

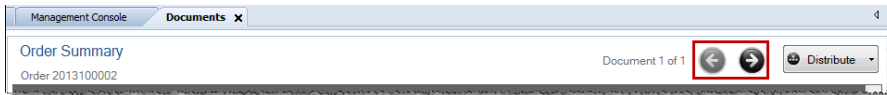
Print Preview

View an example of a document before you print, e-mail or save it. To access the Print Preview function:

1. From the **ProForm Order Tab**, select **Documents**.
2. From the **Available ReadyDocs** tree, select a document to preview.
3. Drag the document from the Available ReadyDocs pane to the **Selected ReadyDocs** pane.
4. Click the **Preview** button.



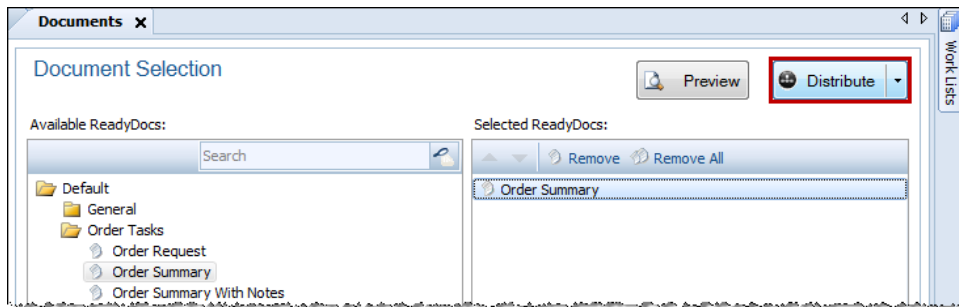
5. Click the **Forward** and **Backward** buttons to navigate document Preview.



Distributing Documents

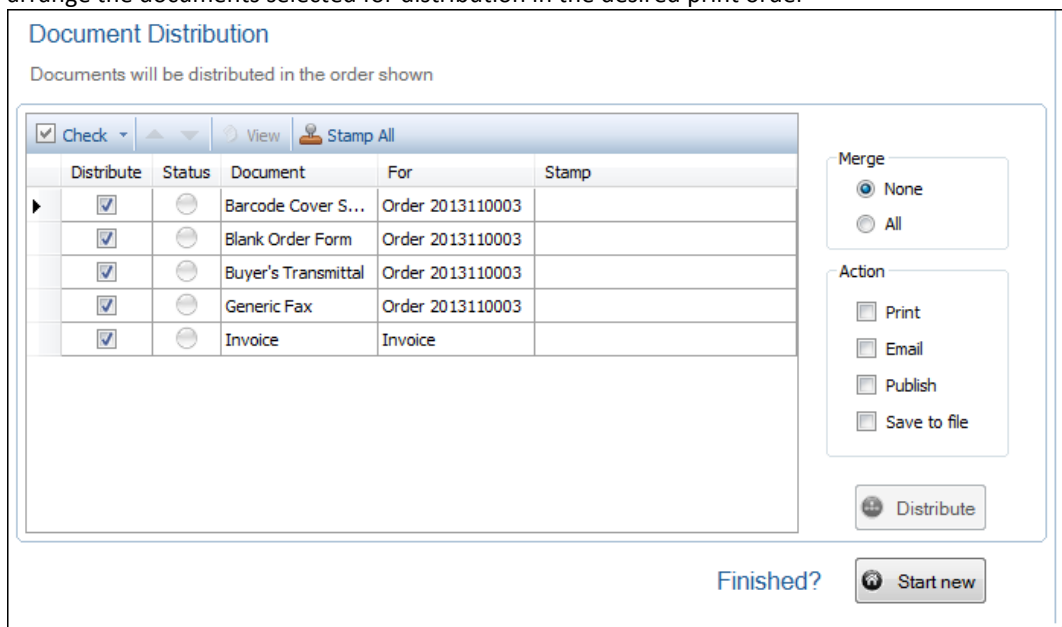
The Distribute function allows the user to simultaneously print, email, publish and/or save the set of documents exactly as they appear in preview mode.

The **Distribute button** is visible as part of the Document Selection screen:



Distribute Screen

The Distribute Screen lists all of the documents in the selected batch. The **up and down arrows** can be used to arrange the documents selected for distribution in the desired print order



Distribute: These checkboxes are used to select which documents are to be distributed together. The **Check** button can be used to select **All** or **None** of the documents in the list.

Status: The Status indicator reflects the current state of the document:

Clear: The document has not yet been rendered.

Green: (OK) The document is ready and current with the state of the underlying order.

Yellow: (Warning) The document is ready but may not be current with the state of the underlying order. If a document is in this state, the user will be asked if the document should be refreshed before it is distributed.

Red: (Error) The document is not ready due to an error during rendering.

For: This column indicates the object for which the document is created or rendered. This may be the order, but it could be any other object such as the First Buyer, the Second HUD, Lender, et cetera.

Stamp All: The Stamp column is used to set the watermark for each document, as desired. Custom stamps may be added by using the [Drop-down Lists Editor](#) in SPAdmin. The default choices of watermark are:

- CONFIDENTIAL
- ESTIMATED
- PREVIEW
- SPECIMEN

Action

Print: Click to send the selected documents to a printer.

Email: Click to email the selected documents to selected order contact message recipients. The email dialog will present any order contacts with email addresses saved to the contact information.

Publish: Click to send the selected documents to the Attachments screen.

Save to file: Click to print the selected documents to a .pdf format and save the file to a desired destination.

Merge

None: this option publishes each document individually as .pdf files, not as part of a collection

All: this option publishes all of the items selected together as one .pdf file

Distribute

Once the Action selections have been made and the documents are ready to distribute, click the Distribute button to initiate the action(s).

Start New

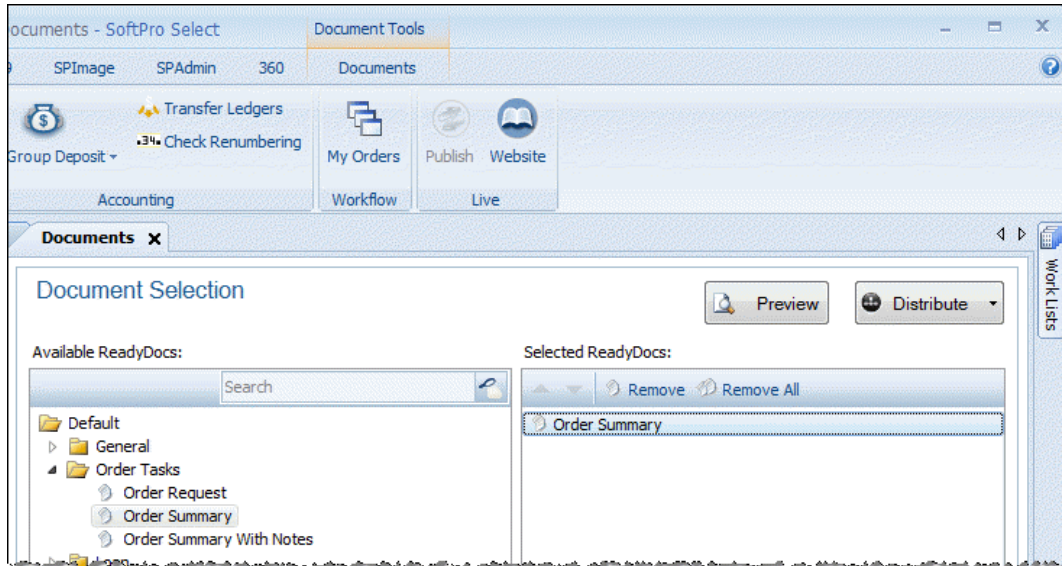
Once the user has distributed the documents as desired, click the **Start Over** button to return to the Document Selection Screen. The previously-selected ReadyDocs will still remain in the right pane, so the user will not have to start over and re-select them. New docs may be added to the existing selection of documents. However, in order to preview the docs again, they will need to be re-rendered.

Saving Documents

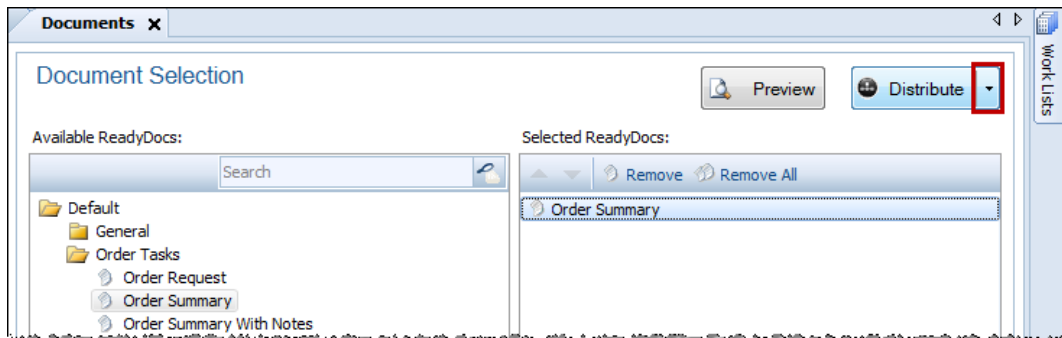
There are three options for saving documents. You may **Quick Save** from the **Document Selection** screen, **Quick Save** from the **Preview Screen**, or **Save to file** from the **Document Distribution** screen.

DOCUMENT SELECTION QUICK SAVE:

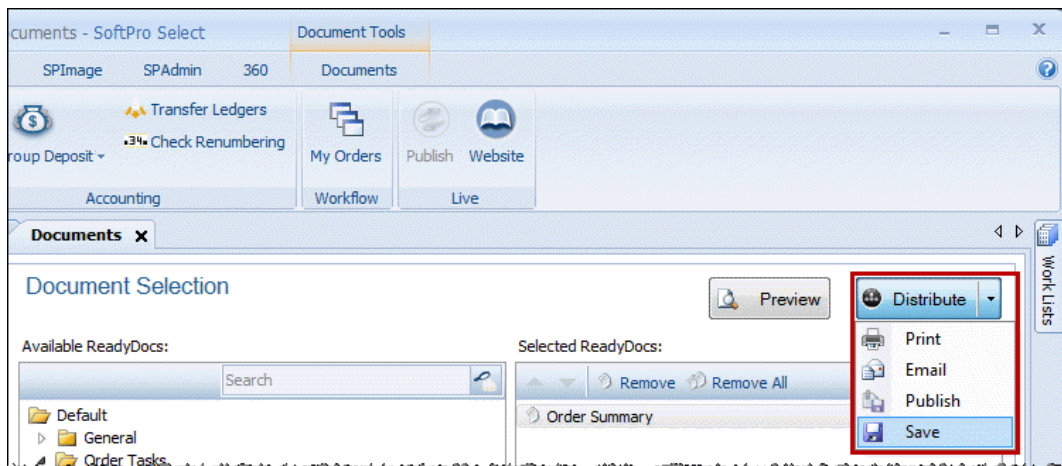
1. From the **Available ReadyDocs** tree, select a document and drag it the **Selected ReadyDocs** pane.



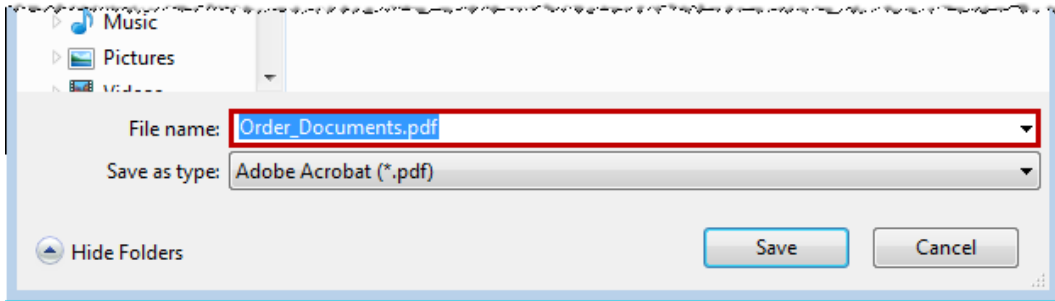
2. Click the small black arrow on the **Distribute** button.



3. Choose the **Save** option in the drop down menu under the **Distribute** button.

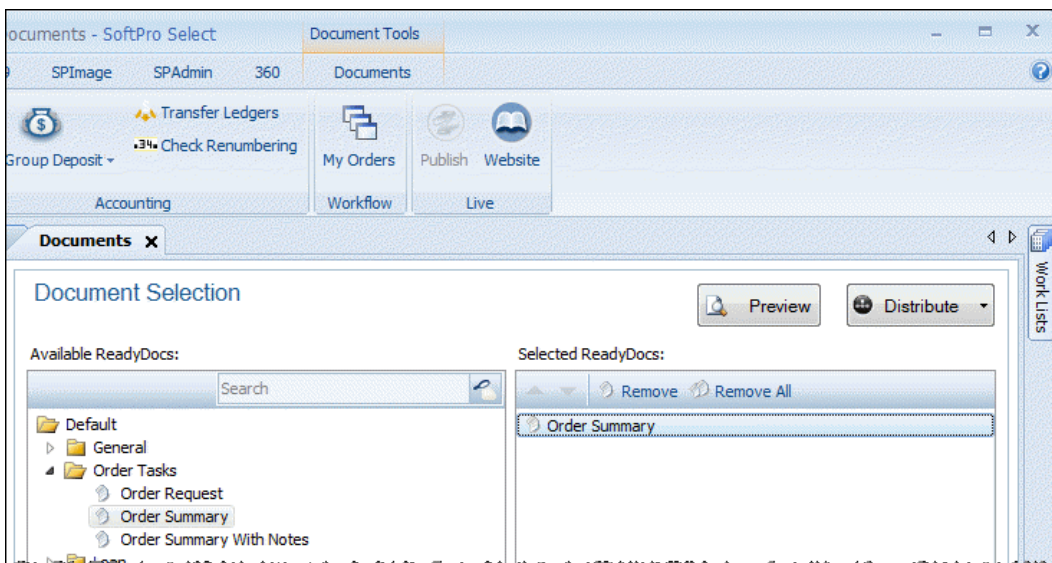


4. Click **Save**. The program will bring up a **Save As** window, enabling the user to choose a name and location. **Note:** All documents **Quick-Saved** from the **Document Selection** screen will be combined into one .pdf file.

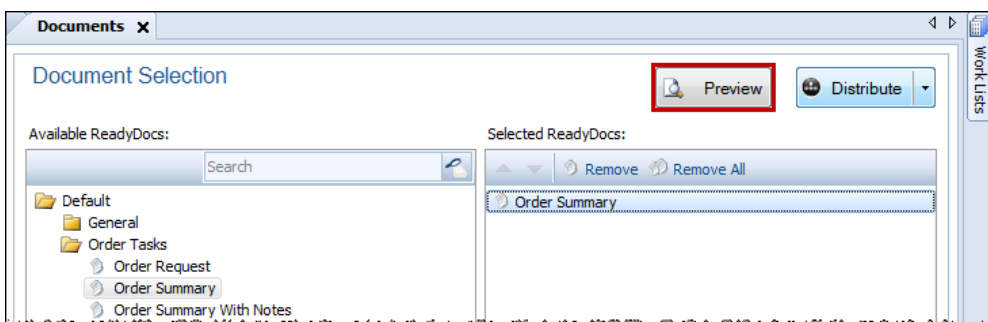


PREVIEW SCREEN QUICK SAVE:

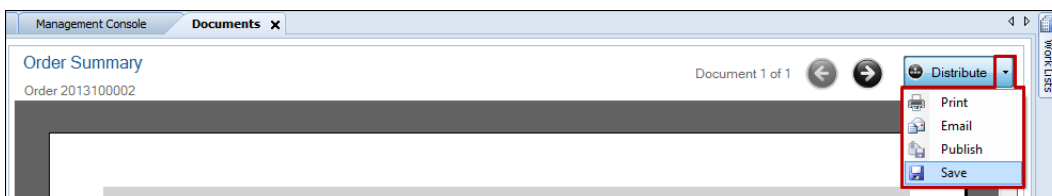
1. From the **Available ReadyDocs** tree, select a document and drag it the **Selected ReadyDocs** pane.



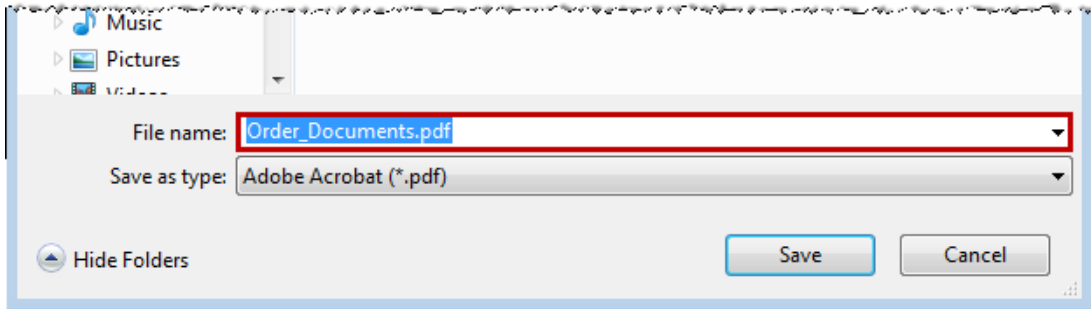
2. Click the **Preview** button.



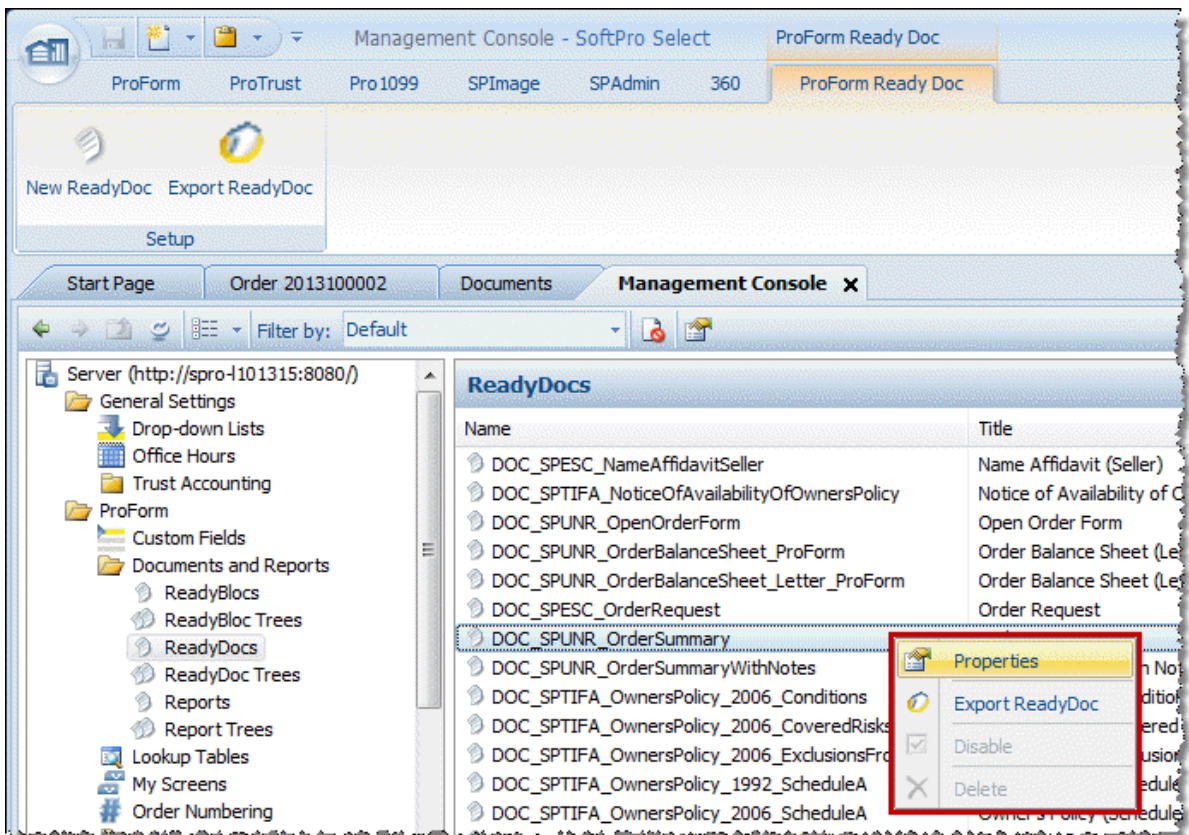
3. From the preview screen, click the **small black arrow** on the **Distribute** button.

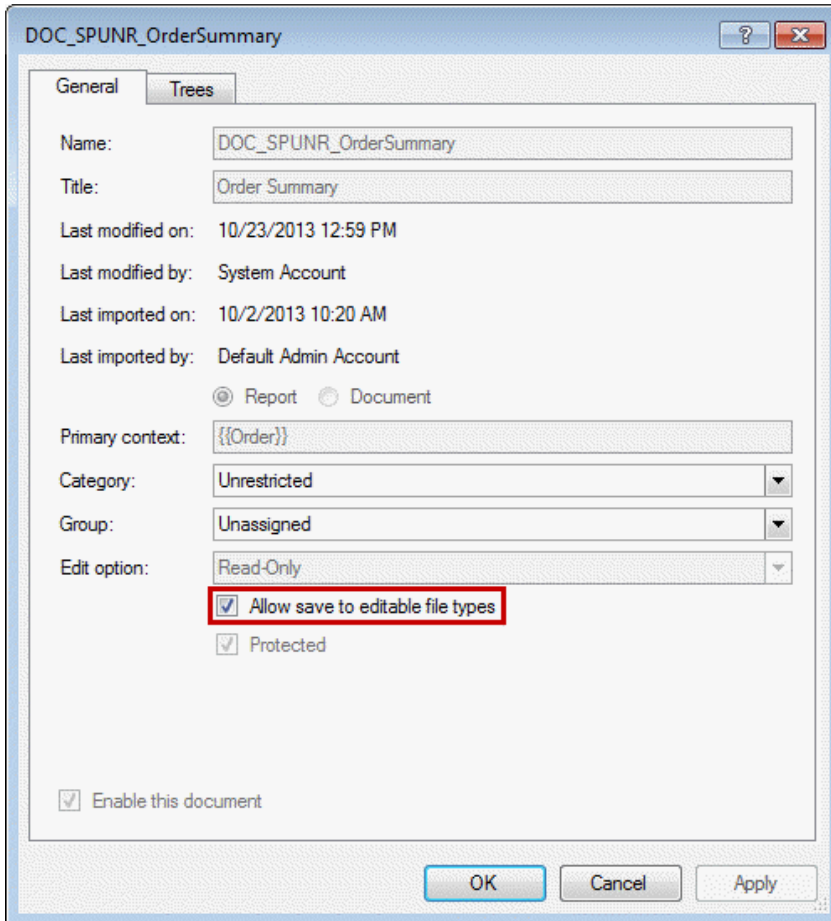


4. Click **Save**. The program will bring up a **Save As** window, enabling the user to select a save location for the file.

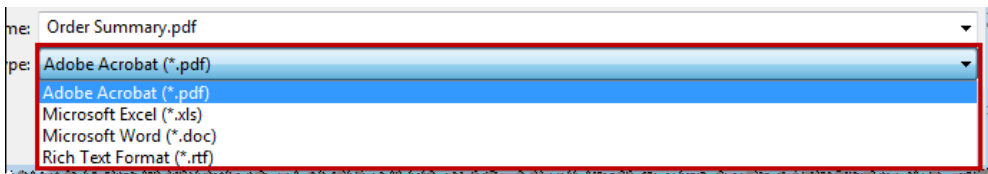


5. **NOTE:** You will only be given the option to save to .pdf from the **Preview Screen** *unless* you have checked the **Allow save to editable file types** checkbox in the document properties. You may access documents and view their properties by going through the **SPAdmin** module, clicking the **Configuration** button, and then navigating through **ProForm > Documents and Reports > ReadyDocs**.



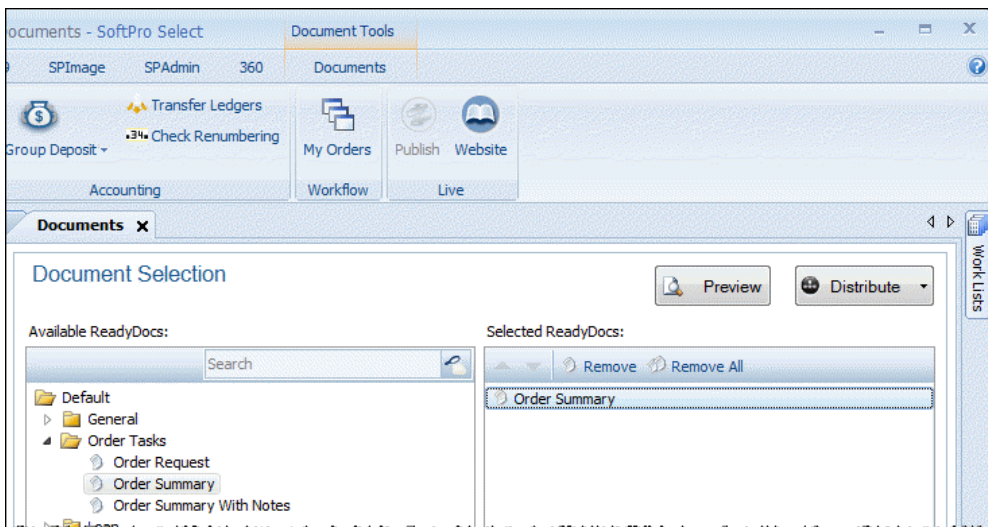


6. If given the appropriate permissions, the user will be able to save in **.pdf**, **.xls**, **.doc**, or **.docx** formats.

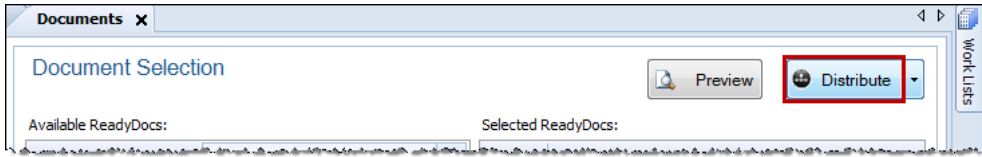


DOCUMENT DISTRIBUTION SAVE TO FILE:

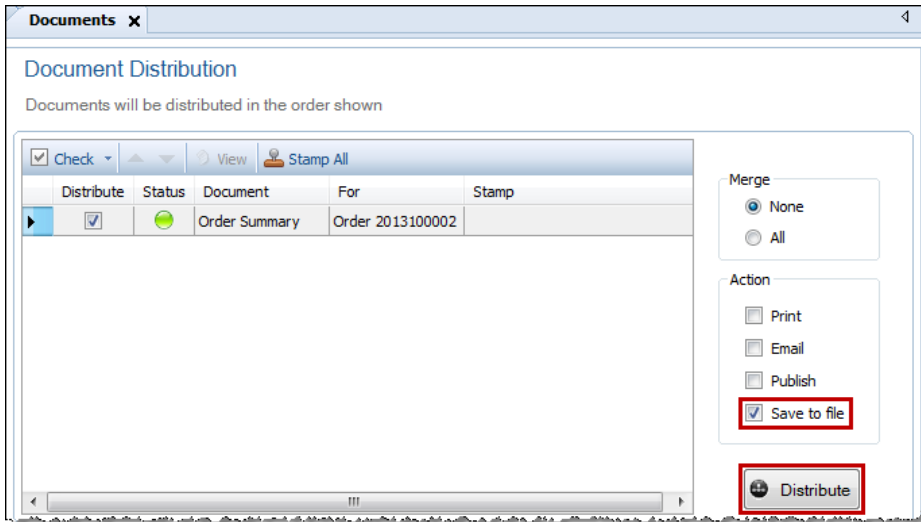
1. From the **Available ReadyDocs** tree, select a document and drag it the **Selected ReadyDocs** pane.



- You may access the **Document Distribution** screen by clicking the **Distribute** button on the **Preview Screen** or the **Document Selection Screen**.



- Use the checkboxes to select the documents you wish to distribute, check **Save to file**, and then click the **Distribute** button. A dialog will appear, allowing you to specify the location to which you want to save. The document(s) can only be rendered in .pdf with the Save to File option. The Merge options **None** and **All** allows you to specify whether or not you want all documents combined into one .pdf or saved as separate .pdfs.

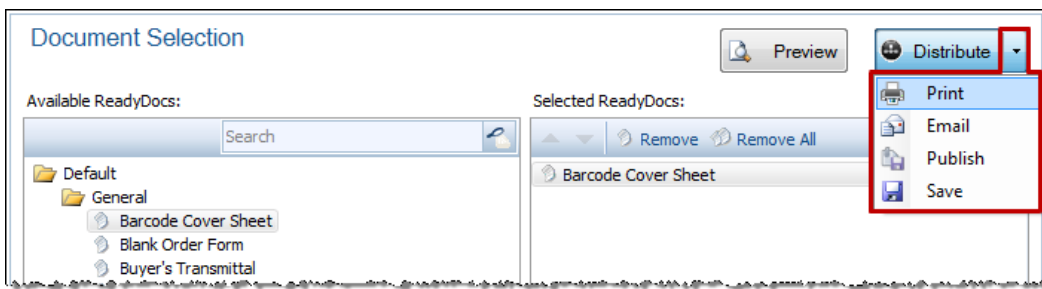


Printing Documents

Printing may be done from the **Document Selection** screen, **Preview Screen**, or **Document Distribution** Screen.

PRINTING FROM THE DOCUMENT SELECTION AND PREVIEW SCREENS

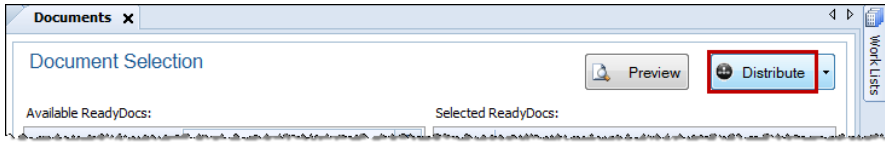
- From the **Available ReadyDocs** tree, select a document that you want to preview.
- Drag the document from the Available ReadyDocs pane to the **Selected ReadyDocs** pane.
- Click the black arrow on the **Distribute** button to bring up the distribute menu, & choose **Print**.



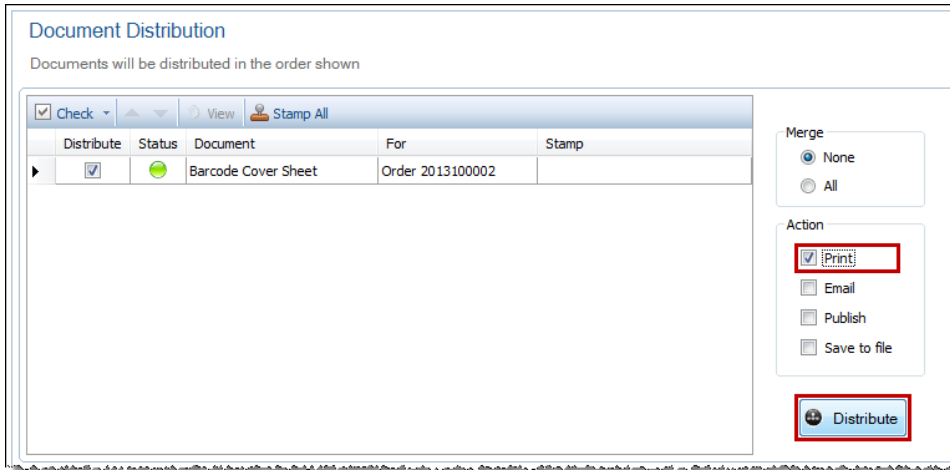
- The exact same process is used to print from the **Preview** screen. While on the Preview screen, click the small black arrow on the Distribute button.

PRINTING FROM THE DOCUMENT DISTRIBUTION SCREEN

1. From the **Available ReadyDocs** tree, select a document that you want to preview.
2. Drag the document from the Available ReadyDocs pane to the **Selected ReadyDocs** pane.
3. Click the **Distribute** button to bring up the Distribute page.



4. Select the documents to save in the **Distribute** column that you wish to print. Select the **Print** checkbox, and press the Distribute button. A print dialog should appear.

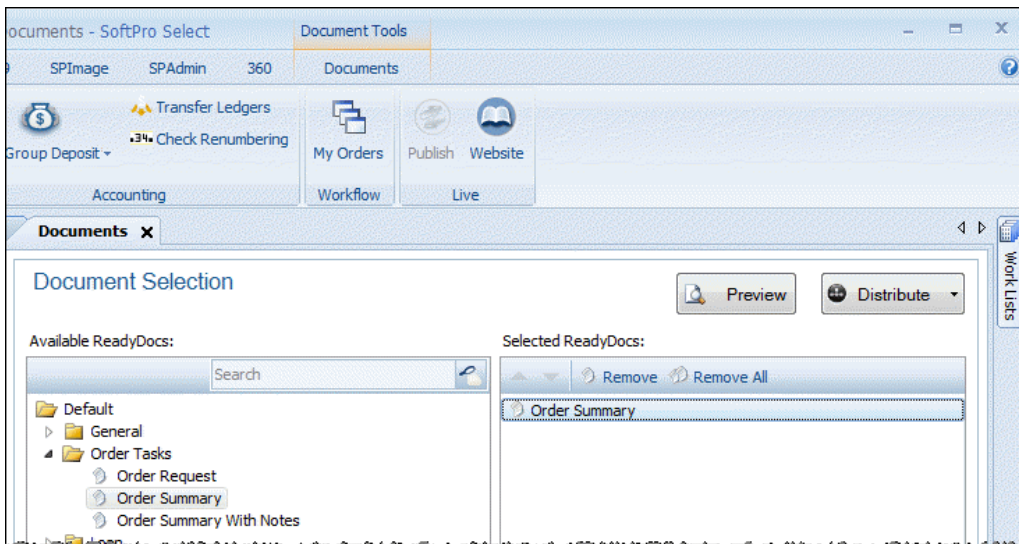


Emailing Documents

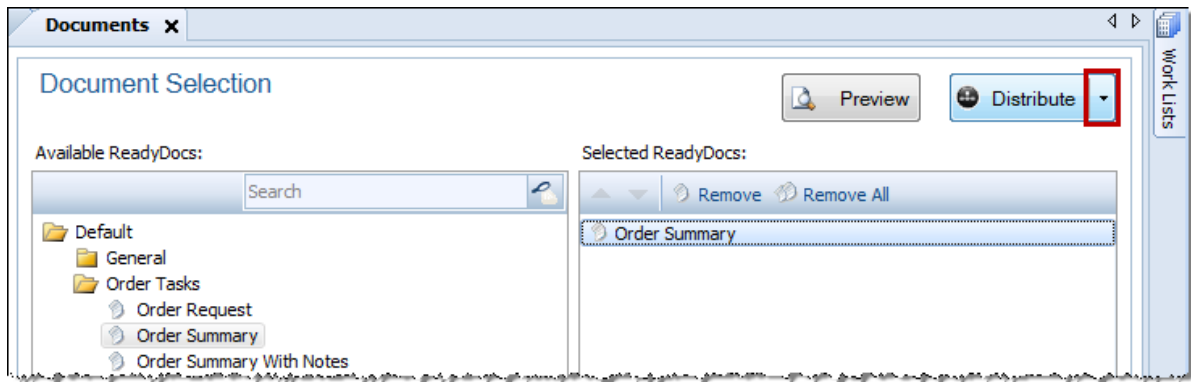
There are three options for emailing documents. You may **Quick Email** from the **Document Selection** screen, **Quick Email** from the **Preview Screen**, or **Email** from the **Document Distribution** screen.

DOCUMENT SELECTION QUICK EMAIL:

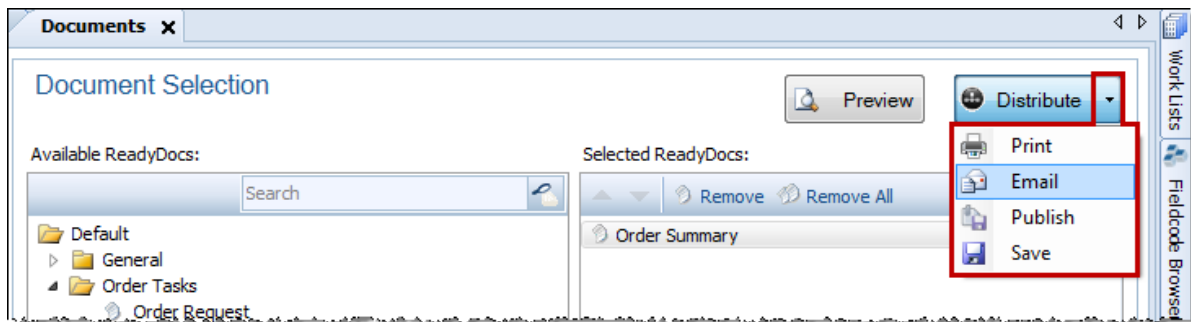
1. From the **Available ReadyDocs** tree, select a document, and drag it the **Selected ReadyDocs** pane.



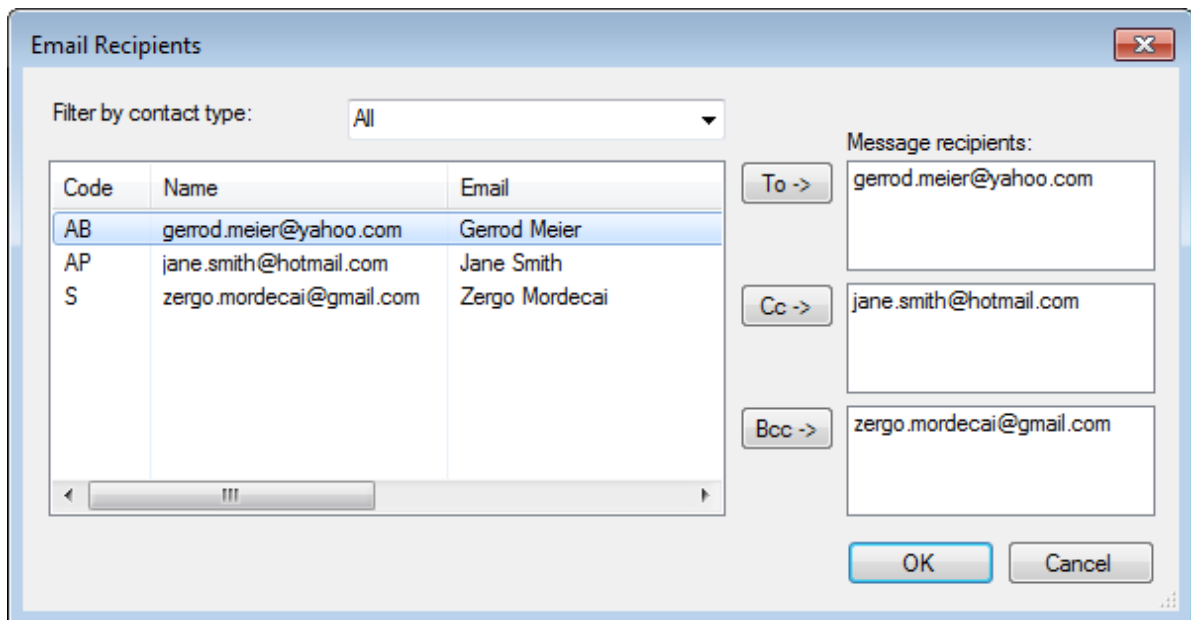
2. Click the small black arrow on the **Distribute** button.



3. Choose the **Email** option in the drop-down menu under the **Distribute** button.

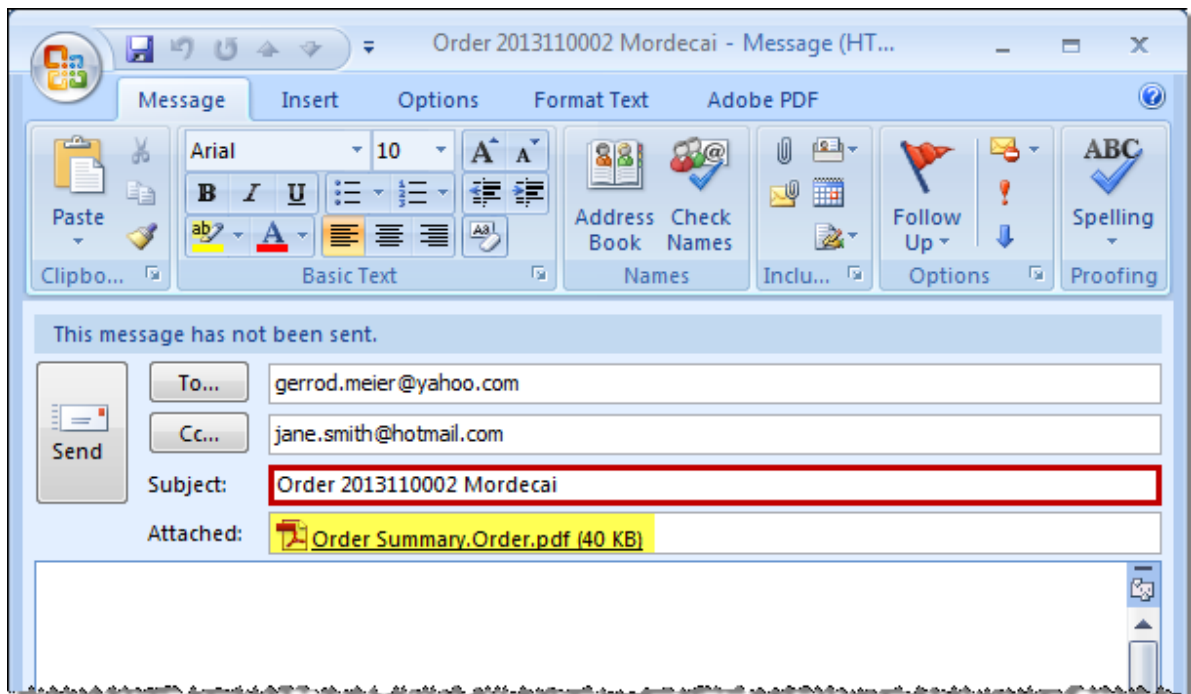


4. The program will bring up an **Email Recipients** window, enabling the user to select email recipients. Any contact or person attached to a contact with an email address entered into the file will appear in the recipients menu. You can filter your choices by selecting a party from the **Filter by contact type** drop-down.



5. Highlight the intended recipient(s) by clicking on their email address and then click the **To->**, **Cc->**, or **Bcc->** button(s) to move them to the appropriate category. Click **OK**.

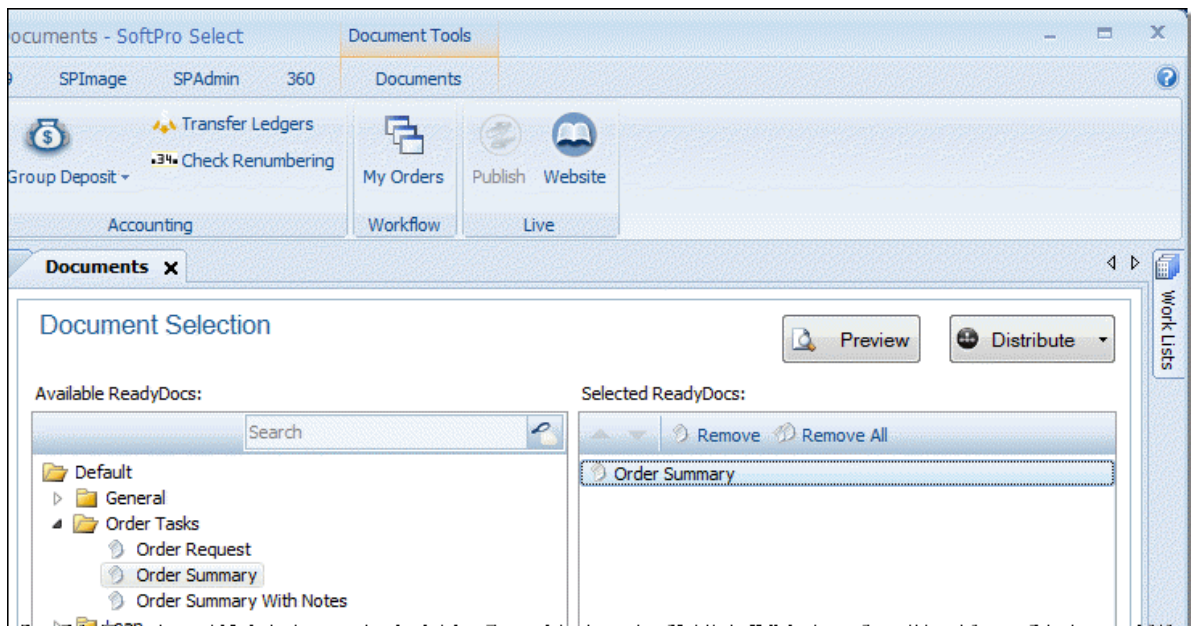
- An email will open with the recipients filled in according to your selection on the recipient window, and the document(s) will be combined and attached as a single .pdf file. The subject line for the email will include the order number, buyer's name and seller's name as applicable. After typing the desired message and editing the subject line, click **Send**.



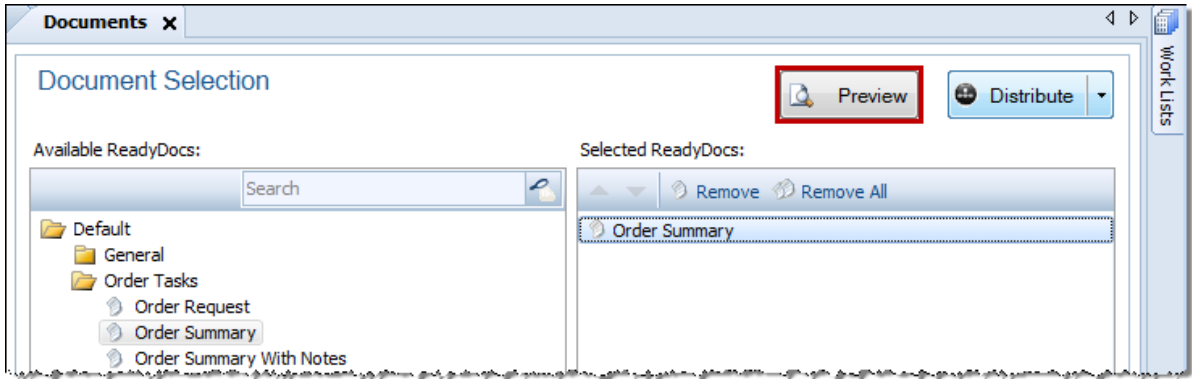
- Once the email has been sent, a record of the email will be entered into the [Document History](#) associated with the file.

PREVIEW SCREEN QUICK EMAIL:

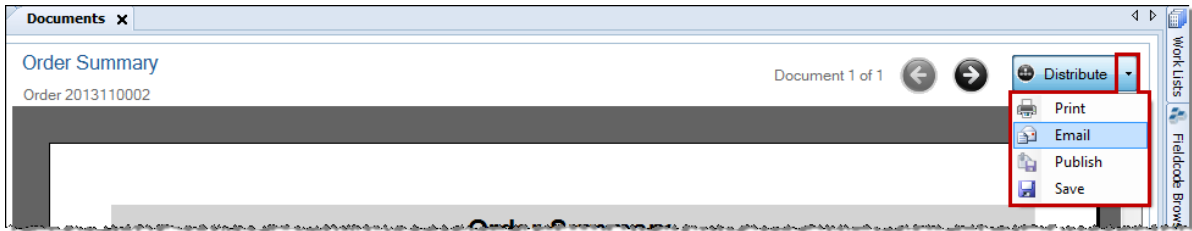
- From the **Available ReadyDocs** tree, select a document and drag it the **Selected ReadyDocs** pane.



- Click the **Preview** button.



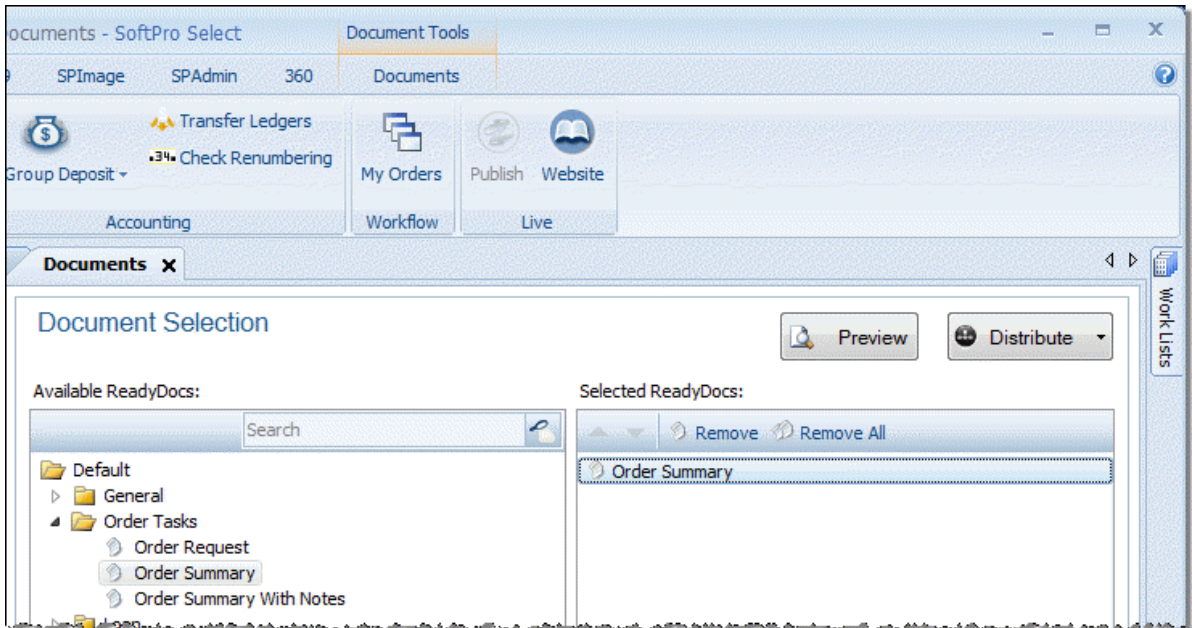
3. From the preview screen, click the **small black arrow** on the **Distribute** button.



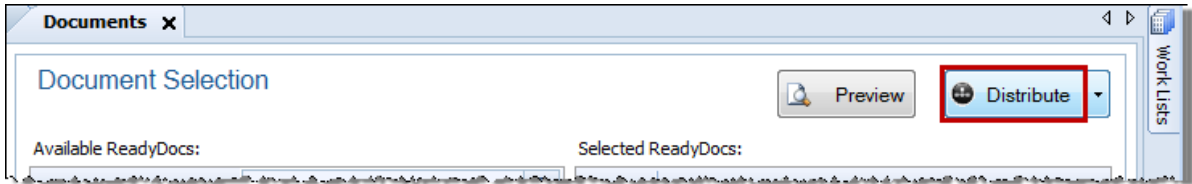
4. Click **Email**. The program will bring up the **Email Recipients** dialog. Follow **Step 4-7** in the section above.

DOCUMENT DISTRIBUTION EMAIL:

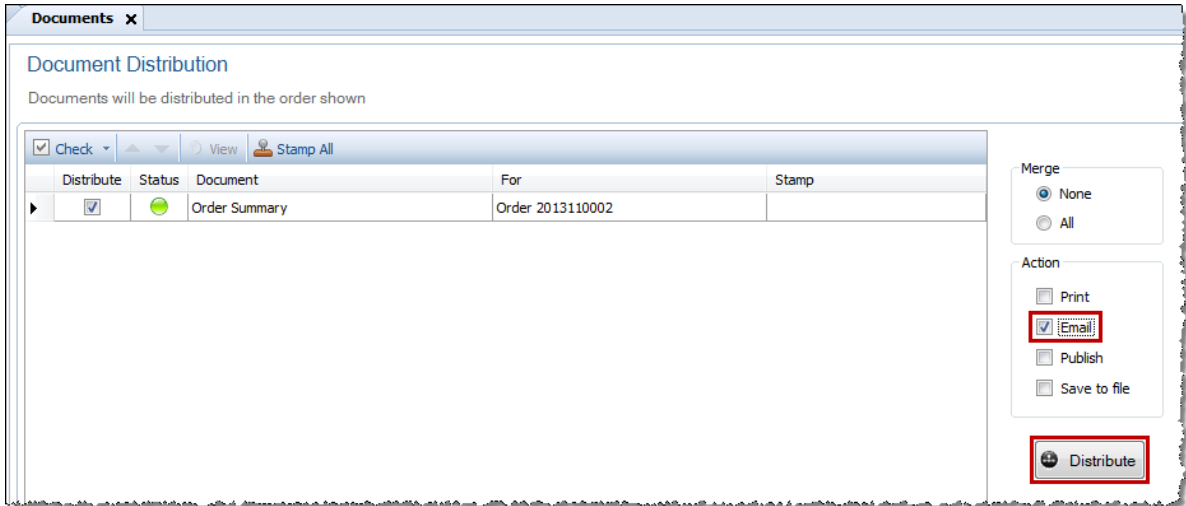
1. From the **Available ReadyDocs** tree, select a document and drag it the **Selected ReadyDocs** pane.



2. You may access the **Document Distribution** screen by clicking the **Distribute** button on the **Preview Screen** or the **Document Selection Screen**.



3. Use the checkboxes to select the documents you wish to distribute, check **Email**, and then click the **Distribute** button. The program will bring up the **Email Recipients** dialog.
4. Follow **Step 4-7** in the section above. **Note:** Document(s) can only be emailed as .pdf attachments with this distribution method. The Merge options **None** and **All** allow you to specify whether or not you want all documents combined and attached as one .pdf or saved as separate .pdfs.



Licensing

Upon opening and successfully logging on to SoftPro Select for the first time, the application checks for a license key. If a key has not been entered, a prompt appears to call SoftPro to request a key. SoftPro will e-mail a license key file with the extension **.SPK**. To install the license key, double-click the **.SPK** file from any client workstation. A license is acquired the first time action is taken within a module (ProForm, ProTrust, SPIImage, etc.). Simply navigating to the module's tab will not acquire a license. Likewise, opening the application will not acquire a ProForm license – action must be taken in ProForm.

Licenses for all modules are released when SoftPro Select is closed. Module licenses are also released when all module screens are closed and the user navigates to another module tab. For example, open SoftPro Select, view the ProForm start page, and click the ProTrust tab - no licenses are acquired. However, open the Reconciliation screen in ProTrust, and a ProTrust license is acquired. Leave the Reconciliation screen open and click the ProForm tab, the ProTrust license is still acquired and will not be released until the Reconciliation screen is closed. This process takes approximately 3 minutes.

Exception: ProClear and Positive Pay are licensed separately from ProTrust.

SoftPro Sales

SoftPro's dedicated sales staff is ready to answer your questions.

Contact your account representative for information about the latest SoftPro products, the SoftPro Annual Maintenance Service Plan, Platinum Level Support Plan, upgrade options and prices, and more. Contact the [SoftPro Solution Center](#) with any technical questions or problems.

Contacting your SoftPro sales representative

Sales phone:	1 (800) 848-0143
Local calling area:	1 (919) 829-1122
Fax:	1-919-755-8350
Web:	www.softprocorp.com
Sales e-mail:	sales@softprocorp.com
Sales hours:	Monday to Friday from 8:30 A.M. to 5:30 P.M. EST.

When sending e-mail, include your company name, city, and state to ensure prompt handling of your request.

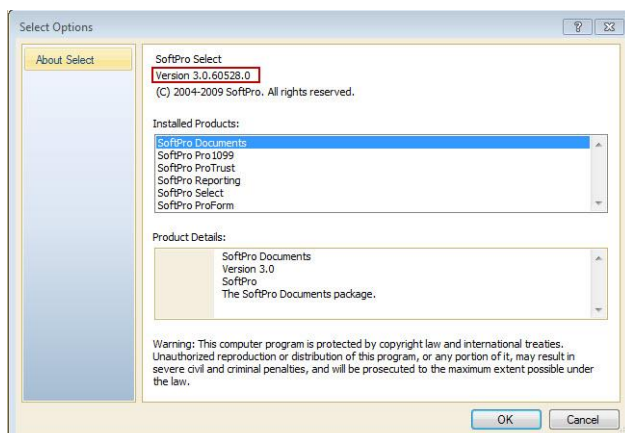
SoftPro Solution Center

SoftPro's technical support staff is the best in the industry. Use the information below to contact them.

SoftPro Solution Center phone:	1 (800) 848-0143
Local calling area:	(919) 829-1122
Fax:	(919) 755-8350
Web:	www.softprocorp.com
mySoftPro:	www.softprocorp.com/mySoftPro/mySoftProLogin.asp (Register with mySoftPro to access the Support Knowledge Base, Document Downloads, and more).
Solution Center hours	Monday to Friday, 8:00 A.M. to 5:30 P.M. EST.
Platinum Level Support hours	Monday to Friday, 8:00 A.M. to 10:00 P.M. EST.
hours	Saturday, 11:00 A.M. – 2:00 P.M. EST.

Before calling technical support, please have the following information ready:

- Program version: select the **File Menu** button, then **Select Options** to find this information.



- Text of any error message you have encountered.
- Name and version number of your operating system.

Subscribing to SoftPro's annual maintenance service program can extend technical support service. Subscribing to platinum maintenance service gives you access to technical support for longer hours during the week and on Saturday. For more information, call [SoftPro Sales](#) at 800-848-0143. You can e-mail SoftPro Sales at sales@softprocorp.com.