

SoftPro Select 4.1.5

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Summary of Changes

Documents

- A new **document bundle installer** allows for easier document management and installation to take place while users are actively working.
- A **My favorites** option has been added to the ProForm documents tree.
- Documents & reports may now be rendered through the API.
- **Documents may now be hidden** from the document tree if they're not applicable to a selected order.

Title

- The user may now overlay exceptions and subordinate matters from another order or template's policy, not just requirements and exceptions from another order or template's commitment.
- **Multi-select** has been added to requirement/exception overlay screen.
- Lien release recording information fields have been added to the Existing Liens screen.
- A **fee type** field has been added to the Additional Title Charges screen.
- The **CDF fee type** is now defaulted when sending from the **Premiums & Endorsements** screens.
- **Calculating & entering title premiums has been improved** on the Title Insurance Premium screen and related screens; final premium amounts are now sent to the payee/payor grids & registers.
- **Charges may now be sent** from the Additional Title Charges screen to HUD lines 1101-1108.

Closing Disclosure Form & Settlement Statements

- Final premiums can now be shown in the debit columns on the settlement statements, and a new Disclosures Dialog has been added to allow the user to edit these amounts.
- The **final premium amounts and splits** are now sent to the payee/payor grids and registers.
- An **Other** amount field has been added to the **percent charge**.
- The seller pay % has been enabled in templates to allow percent charges with commissions.
- Fee types have been added to each row in the Section E fee schedule grids.
- The first column of the **Projected Payments** section now allows the user to enter both Minimum and Maximum payments.
- A CDF checkbox option was added to show/hide amounts of additional disbursements from broker's commissions on document.

Technical Requirements

• .NET Framework 4.6.1: SoftPro Select 4.1 requires the .NET Framework 4.6.1, and will include it during the installation process.

- **Supported** Operating Systems:
 - Server: 2012 R2, 2012, 2008 R2 SP1
 - **Client**: Win 10, Win 8.1/8, Win 7 SP1
- **Unsupported** Operating Systems:
 - Server: 2008 SP2, 2003 SP2
 - Client: Win 7, Vista, XP
- Note: This version of the .NET Framework is not supported with Exchange 2013. For more information, <u>read this article</u> at Microsoft.com.
- Integrations:
 - SoftPro Select v4.1 contains major enhancements and API changes. Customers with integrations will need to rebuild their integrations against v4.1 in the same manner as with prior releases that had a major or minor version number change.
 - Note: It will be necessary to target and recompile external code against .NET framework 4.6—NOT 4.6.1.
 - The Select SDK now requires Visual Studio 2015.
- Database: Changes have been made to the CDF forms and Settlement Statements.
 - If you have any custom versions of these forms, they will require upgrade by the custom reports team.
 - SQL Server 2005 is no longer supported.

(4.1) 4/16/2016

A number of new features and improvements are included with this release.

Documents

- Select now has a <u>bundle manager</u> in SPAdmin to aid in document installation.
- Users have been given new options for accessing <u>document favorites</u>.

Bundles

The new **Bundle** installer allows administrators to install and uninstall document updates at any time, including while users are in the application; there is no need to have the users exit before updating. Bundle files (.bnd) may contain ReadyDocs, ReadyBlocs, reports, tree definitions, & custom fields. 197877

<u>Bundle Manager</u>

Viewing, Installing, & Uninstalling document bundles is now handled underneath the SPAdmin folder:



Bundle Installation Wizard

The application will walk you through the import process. With the appropriate permissions, an administrator can install or uninstall documents while users are still logged in to Select:



To launch the wizard, complete one of the following actions:

- Click the Install Bundle in the ribbon,
- Right click the icon in the tree, or
- **Right click in the white space** in the Bundles pane.

Installing a new bundle only requires a few clicks:

1. The first screen is a welcome screen. Click Next:



2. The second screen allows you to browse and confirm the **.bnd** bundle file that you wish to install. After selecting a .bnd, click **Next**:

Bundle File
Select the bundle file to import.
Bundle File
sg4m4)\Select 4.1\Bundles_0317.1\TLTA 2.3325.1)\TLTA.bnd Browse
Cancel

3. The wizard scans the bundle & allows you to review the package details. Click **Next** when ready:

nport Bundle Wizard			2
Review Bundles Bundle File: TLTA Version: 4.1.40218.0			
Name	Туре	Descrip	*
T38ClerksFileNumber_TLTA#	Custom Field		_
T38RecordVolumeBook_TLTA#	Custom Field		
T38PlaceOfFiling_TLTA#	Custom Field		
DownDateMortgageePolAdditionsSchB_TLTA#	Custom Field		
T38RecordPage_TLTA#	Custom Field		Ŧ
<		•	
Click next to begin the import process.			
_	Next >	Cancel	
			_

4. The import process will proceed **automatically**:



5. You will receive a message that the package was installed successfully. Click **Finish**:

Import Bundle Wizard	
Bundles Imported Successfully Your bundle file has been successfully imported. Click finish to exit.	
Finish Cancel	

6. You can view the newly-installed bundle in the **Bundles Pane** at right. You may double click on the bundle name and open up the <u>bundle properties</u> dialog:

Manage	ment Console - SoftPro Select	Bundles -	. = X
ProForm ProTrust ProDesign	Pro 1099 SPImage SPAdmin	Bundles	0
Install Bundle			
Setup			
Start Page Management Console >	۲		
< 🍦 🖄 🛫 👫 👻 Filter by: Default	- 🔥 🖀		Work
Server (http://spro-d101436:8080/dev)	Bundles		Lists
	Name	Version	
		(Croion)	
Profound	SoftPro Reports and Documents Package	ge 4.1.40204.1	
ProTrust Automation	SoftPro Reports and Documents Packag	ge 4.1.40204.1 4.1.40126.0	
P ProTrust Automation P Pro 1099	 Image: SoftPro Reports and Documents Package Image: SPALTA Image: SpaLTA 	ge 4.1.40204.1 4.1.40126.0 4.1.40218.0	
	₩ SoftPro Reports and Documents Packag ₩ SPALTA ₩ TLTA	ge 4.1.40204.1 4.1.40126.0 4.1.40218.0	
 ▷ ProTrust ▷ Automation ▷ Pro1099 ▷ Security ▲ SPAdmin ♥ Bundles 	₩ SoftPro Reports and Documents Packag ₩ SPALTA ₩ TLTA	ge 4.1.40204.1 4.1.40126.0 4.1.40218.0	
 ▷ ProTrust ▷ Automation ▷ Pro1099 ▷ Security ▲ SPAdmin ♥ Bundles ▷ ■ Reports 	₩ SoftPro Reports and Documents Packag SPALTA ₩ TLTA	4.1.40204.1 4.1.40126.0 4.1.40218.0	

Bundle Uninstallation

Uninstalling bundles may only be done by **right-clicking** a bundle in the **Bundles Pane** and selecting **Uninstall**. You will be prompted to confirm and then the program will delete the bundle:

Bundles			
Name			Version
🐨 SoftPro Reports and Docu	ument	ts Package	4.1.40204.1
SPALTA			4.1.40126.0
TLTA			4.1.40218.0
	<u>8</u>	Properties	-
	X	Uninstall	←

• Users are able to continue working with documents that are being uninstalled by an administrator—if the document(s) are open when the uninstallation begins—but once they close the document(s), the documents will disappear and be unavailable.

Bundle Properties

The properties of a given bundle may be viewed by **double-clicking** or by **right-clicking** and choosing the Properties option from the context menu:

E Server (http://spro-d101436:8080/	Bundles	
General Settings		
ProForm	Name	Version
ProTrust	₩ ALTA	4.1.40325.3
Automation	i SoftPro Reports and Documents	4 1 40224 0
Pro 1099	\rightarrow	Properties
E Security		X Uningtall
4 🧁 SPAdmin		∧ Uninstali
👹 Bundles		(
Reports		
A SPIMARE		

- This will present a dialog for that bundle which contains **General & Items** tabs:
 - **General Tab**: View the bundle's name, description, version, & author.

SoftPro Reports	and Documents	? <mark>- × -</mark>
General	Items	
Name:	SoftPro Reports and Documents	
Description:	SoftPro Reports and Documents	*
		~
Version:	4.1.40324.0	
Author:	SoftPro Corp.	

Items: View all bundle contents by name, type (Custom Fields, ReadyBlocs, ReadyDocs, et cetera), & description.

General Items			
			_
Name	Туре	Description	1
1031ExchangeAccommodatorNumber_SP#	Custom Field		
1031ExchangeAmountPaidOutsideEscrow_SF	Custom Field		
1031ExchangeCashThroughEscrow_SP#	Custom Field		
1031ExchangeComputationOfExchangeValue	Custom Field		

Bundle Permissions

Three new permissions have been added to **SPAdmin > Bundles**:



- Bundles manager: If this permission is granted, the user can view the Bundles Manager.
- **Bundles manager install**: If this permission is granted, the user can **install** bundles. The user also needs Bundles Manager permission to take this action.
- **Bundles manager uninstall**: If this permission is granted, the user can **uninstall** bundles. The user also needs Bundles Manager permission to take this action.

Versions

ReadyBlocs, ReadyDocs, and Reports now have a Versions tab available in their properties view.



When accessing the properties for one of these document types, the user will see the new versions tab in the center of the dialog. For example, here's the tab as it appears on an endorsement ReadyDoc:

DOC_En	dorsemer	nt	? 🗙
Gene	eral V	ersions Trees	
4	3		
	Version	Modified On	Modified By
1	1	2/8/2016 1:32 PM	System Account

- **Preview** : This button will open Microsoft Word and allow the user to view the document that is selected in the list. A document may be revised in preview mode and saved as a new document, but it will have to be imported into the documents folder before it can be used.
- **Pin/Unpin** 🛃 : This button allows the user to specify which version is being used in ProForm.
 - The pinned document will always be used, even when another bundle is imported.
 - By default, the most recent version is selected.

DOC_Er	DOC_Endorsement				
Gene	eral V	ersions Trees			
4	7				
	Version	Modified On	Modified By		
	5	2/12/2016 2:17 PM	Default Admin Account		
	4	2/11/2016 3:54 PM	Default Admin Account		
	3	2/11/2016 3:51 PM	Default Admin Account		
	2	2/11/2016 3:24 PM	Default Admin Account		
	1	2/11/2016 10:07 AM	System Account		
h laha					

• A user may pin an earlier version should they need to do so. This document version will become the version active in the application:

DC	DOC_Endorsement				
	Gene	eral V	ersions Trees		
	4	3		8	
		Version Modified On Modified By			
		5	2/12/2016 2:17 PM	Default Admin Account	
		4	2/11/2016 3:54 PM	Default Admin Account	
		3	2/11/2016 3:51 PM	Default Admin Account	
	1	2	2/11/2016 3:24 PM	Default Admin Account	
		1	2/11/2016 10:07 AM	System Account	

- Version column: Lists versions of the document that have been created.
- Modified On column: Shows the date and time that a document was changed.
- Modified By column: Lists the name of the user who changed a particular version.

Visibility Conditions

With this release, the user has an option to change the visibility of **individual ReadyDocs** and **ReadyDoc tree folders** with Python code. Code can be added and manipulated here to determine whether or not users see the corresponding documents & folders on the Documents screen in ProForm. *89401*

• **ReadyDoc Properties**: One of the final fields on this tab is the new visibility conditions option.

DOC_Endorse	ment		? <mark>×</mark>
General	Versio	ns Trees	
Name:		DOC_Endorsement	
Title:		Endorsement	
Last modifi	ed on:	2/8/2016 1:32 PM	
Last modifi	ed by:	System Account	
		Report Ocument Ocu	
Primary cor	ntext:	{{Order.Title.Endorsement}}	
Category:		Unrestricted	-
Redirect:			-
Edit option	:	Read-Only	-
Visibility co	ndition:		
		Allow save to editable file types	1
Enable	this doc	ument	.
		OK Cancel	Apply

- Typing or pasting directly into this field **will not** change the condition here. In order to create and edit Python code, you must use the <u>expression editor</u>, accessible through the ellipses button.
- **ReadyDoc Tree folder** properties: Opening a tree, then a tree tab, then viewing the properties on a folder will allow for editing the folder name and provide access to the <u>expression editor</u>:



• Typing or pasting directly into this field **will not** change the condition here. In order to create and edit Python code, you must use the <u>expression editor</u>, accessible through the ellipses button.

Expression Editor

This editor accepts expressions in simplified Python language:

1	Express	sion Editor						- 0	×
	1	return	any(invoice.Number	for	invoice	in Ord	der.Invo	ices)	4
	•								F.
							ОК	Cano	el

- Formulas may be copied and pasted into this scrollable text editor.
- Do not capitalize Python Keywords (i.e. return, if, else, and, or, is, in).
- Capitalization is required when using either True or False.
- Use capital letters when typing field codes as they appear in the Field code Browser (i.e. Order.TransactionType).
- Correct indentation is required.
- Note: Python is a standard scripting language and many free tutorials are available online. For SoftPro-specific questions about Python conditions, please refer to SoftPro's developer forum www.softprocorp.com/devforum.
- Sample Expressions:
 - **Default/Escrow & Closing/CDF Documents**: If the settlement type of the order is CDF, the CDF Documents will display:

return Order.Sett	<pre>clementType == Order.Settle</pre>	ementType.CD	E
ReadyDoc Trees Name Description		Last Modified On	Last Modified By
	F Documents	8 23	
Corder Tasks Cosing Rent Schedule Corder Balance Sheets Corder Documents Cosing Disclosure F Cosing Disclosure F Cosing Disclosure F	Expression Editor 1 return Order.SettlementType == 0 III	Order.SettlementTyp	e.CDF

 Default/Escrow & Closing/HUD-1 Documents: If the settlement type of the order is HUD-1, the HUD-1 Documents will display:

```
return Order.SettlementType == Order.SettlementType.HUD1
```



• **Default/General/Invoice**: Will display the Invoice doc **IF** an invoice exists on the order.

return any (in	voice.Number for invoice in Order.Invoices)
Name Description	DOC_SPUNK_Invoice 16 25 General Versions Trees
 Title Insurance (ALTA) Title Insurance (ALTA) Default General Default General Barcode Cover Sheet 	Name: DOC_SPUNR_Invoice Title: Invoice Last modified on: 4/11/2016 2:10 PM Last modified by: Default Admin Account
Buyer's Transmittal Seenic Fax Sinvoice	Edit option: Read-Only Visibility condition: return any[invoice.Number for invoice in Order.Invoices)
 Legal Description Name Affidavit (Buyer) Name Affidavit (Seller) Open Order Form Tax Forms Order Tasks Loan Escrow & Closing 	Allow save to editable file types Expression Editor 1 return any (invoice.Number for invoice in Order.Invoices)

• **Default/General/Legal Description**: The Legal Description document will display **IF** a legal description for any property has been entered in the order.

return **any**(prop.EscrowLegal.Description **for** prop **in** Order.Properties)

ReadyDoc Trees					
Name	Description			Last Modified On	Last Modified By
n Default					
 Title Insurance (ALTA) Title Insurance (ALTA) 	ſ	DOC_SPESC_LegalDe	scription	8 8	J
Defaul		General Versio	ons Trees		
General Tree	Profiles	Name:	DOC_SPESC_LegalDescription		
	. Tomoo	Title:	Legal Description		
	• •	Last modified on:	4/6/2016 11:27 AM		
Default A C General		Last modified by:	System Account		
Barcode Co	over Sheet		Report Ocument Ocu		
Blank Order	r Form nsmittal	Primary context:	{{Order}}		
D Generic Fax	ĸ	Category:	Escrow	-	
	ription	Redirect:		-	
Name Affida	avit (Buyer)	Edit option:	Read-Only	•	
Name Affida Open Order	avit (Seller) r Form	Visibility condition:			
👂 🚞 Tax Form			-		
Director	Expression Ed	ditor			
▷ a Loan ▷ a Escrow & Clo	1 ret	urn any(prop.E	scrowLegal.Description for	prop in Order.Prope	rties) 🔺
	•				4
				ОК	Cancel

Document Favorites

Users can now create and maintain a folder containing their favorite/frequently-accessed documents. This option has been added to the Documents screen: 27343

Order CDF2016020004 Documents	5 X	4 Þ
CDF2016020004	Document Selection	🛕 Preview 🚇 Distribute 🗸
Property	Available ReadyDocs:	Selected ReadyDocs:
Buyer	Add to Favorites 🔅 Search	A V S Remove S Remove All Add V
Seller	Default General Barcode Cover Sheet	
	Blank Order Form	

Several items to note regarding Favorites:

- It is managed by individual users.
- Users may add new folders and documents and organize however they wish.
- Users are free to rename folders and documents.
 - These custom names will only appear in an individual user's favorites; users cannot rename documents or folders for everyone else.
- **Favorites are saved in the user's remote profile** and can therefore be deleted with system changes. If this happens, they will have to be recreated by the user in Select.
- The Search bar will search the favorites folder & all other documents visible to the user.
 Search

<u>Add to Favorites</u>

- The user may add documents or folders with the **Add to Favorites** button 🛱 Add to Favorites......
 - Users may also **drag &** drop documents or entire folders from the tree into their favorites area.
- Only one document or folder may be added at a time; the user will have to specify where in their favorites they wish to save the new item:

Available ReadyDocs:	Selected ReadyDocs:
Add to Favorites Search	🔦 🧹 🦻 Remove 🕬 Remove All Add
Favorites	Add New Favorite
📮 Folder 2	Pick a folder location for the new favorite.
General	Favorites
 Blank Order Form Buyer's Transmittal 	Folder 2
 Generic Fax Invoice 	OK Cancel
 Legal Description Name Affidavit (Buyer) 	
Name Affidavit (Seller)	<pre></pre>

• If a folder is selected & added, it will be added along with all the documents it contains.

Manage Favorites

• Users may organize, rename, or delete items by using the Manage Favorites button 🔯 :

Manage Favorites
 ▲ ► ▲ ► Favorites ▲ ► Folder 1 ▲ Barcode Cover Sheet ▲ Blank Order Form ▲ Blank Order Form ▲ Blank Order Form ▶ ► Folder 2 ▶ ► Order Tasks
Image: Description New Folder Move Rename Delete Help Close

- Folders and documents may be moved by using the arrows at the top of the dialog, dragging and dropping them in different areas, or by using the move button.
- Folders and documents may be deleted and renamed via the buttons at the bottom of the dialog or by right-clicking.

Other Changes

- Extremely long legal descriptions were not rendering correctly as attachments; resolved. 261120
- Spacing issues were occurring on documents with prompts after retrieving requirements or exceptions containing formatted text. 290193

Title Insurance

The Additional Title Charges screen has been modified, the Title Overlay process has been improved, Lien release recording information fields have been added to the Existing Liens, and entering title premiums has been improved on the Title Insurance Premium screen and related screens.

Additional Title Charges

• A Fee type drop-down field has been added in the Calculate Charge section. When a fee type is selected here, the fee type will be sent to the selected CDF line: 306862

<u>Calculate Charge</u>		
Minimum charge:		
Charge based on:		-
Multiplication %:	%	
Adjustment: +/-		
Charge:		
Fee type:		• •

 A change was made to allow users to send Additional Title Charges to lines 1101-1108 on 1986 HUD orders. 308236, 298615

Fee Types

- CDF fee types default as follows when sent from the Premiums & Endorsements screens. 281190
 - **Loan policies**: Title Lenders Coverage Premium.
 - **Owner's policies**: Title Owners Coverage Premium.
 - Endorsements (all): Title Endorsement Fee.

Existing Liens

• A new set of fields has been added to the Existing Liens screen. The Lien Release Recording Information contains the same fields that are included in the Recording Information section and they function in the same manner: 280134

Dated:	(None) Date/Time recorded: (None) Maturity date: (None)
Recorded at/in:	
Place recorded:	
Place re-recorded:	

Title Overlay

- When overlaying title product items, the user may now drag and drop (or press Add) to include the following from the source order tree to the destination order tree: 64903, 13646
 - o individual items,
 - o multiple items,
 - o all items related to a commitment by selecting the Commitment node,
 - o all items related to requirements by selecting the Requirements node,
 - \circ $\;$ all items related to exceptions by selecting the Exceptions node,
 - o all items related to owner's policy by selecting the Owner's Policy node,
 - o all items related to **loan policy** by selecting the Loan Policy node,
 - o all items related to **subordinate matters** by selecting the Subordinate Matters node.
 - Screenshot below:



Premiums

Several changes have been made to how title insurance premiums are handled.

<u>Splits</u>

- **CDF Regulations**: Recent federal regulations require that title insurance premiums be disclosed on the Closing Disclosure form in a specific way for simultaneous issues:
 - The **loan policy premium amount** must reflect what the premium would be if it were not a simultaneous issue.
 - The **owner's policy premium** must reflect the difference between that loan policy premium and the total cost of the two policies under a simultaneous issue.
- **Select version 4.0**: With this previous release of the software, the regulated premiums were reflected in the CDF lines, payor/payee grids, and register.
- Select version 4.1: With this current release, we made a change to show the traditional premiums on the CDF payor/payee grids and in the register so that all disbursements and revenue reports reflect the final premiums.
 - With CDF Simultaneous Issue policies, when the Show full premium on CDF/HUD-1 checkbox is checked, the final premiums will be sent to the payor/payee grids on the CDF lines instead of the SI net owner's premium/Full loan premium.
 - This will make tracking premiums and handling accounting easier, as **the premiums in these areas will be the real premiums instead of the CFPB-regulated premiums**.
 - The **SI net owner's premium** and the **Full loan premium**, however, are still shown on the CDF line for purposes of the regulatory requirements of the CDF document.
 - Since there is no longer a need for the **SI Net Owner's premium** and the **Full Loan premium** splits, they were removed.

Title Insurance Premiums & CDF Page 2

These changes only apply to 4.1 CDF orders and templates for Simultaneous policies when the "Show full premium on CDF/HUD-1" checkbox is checked; CDF orders and templates created in previous versions will still show the splits sections containing the previous field configurations.

• The SI net premium to split field & SI Net Premium column have been removed from the Owner's policy. The Final Premiums are now sent to the CDF payee/payor grids & register:

<u>Split</u>					
Based on:	Premium Calculation	 Final Premium 	•		
Premium to split:	\$1,678.00	Prior policy adjustment:	Final premium to split:	\$1,678.00	
SI net premium to split i	\$736.00				
Split to	Adjustment	Percent	Final Premium	5I Net Premium	Bill code
U 🔻 Uncom	+	10.00000 % of Final Premium to Sp	lit 🔻 = \$167.80	\$73.60	•
•	+	· % of Balance after 1st S	plit 🔻 =		•
•	+	· 8 of Balance after 1st S	plit 🔻 =		•
•	+	· % of Balance after 1st S	plit 🔻 =		•
~	+	· 8 of Balance after 1st S	plit 🔻 =		•
A Strict S			Excess = \$1,510.20	\$662.40	

• The Full Premium to split field & Full Premium column have been removed from the loan policy. The Final Premiums are now sent to the CDF payee/payor grids & register:

<u>Split</u>			
Based on:	Premium Calculation	Final Premium	
Premium to split:	\$404.00	Prior policy adjustment: Final premium to split: \$404.00	
Full premium to split.	\$1,346.00		
<u>Split to</u>	Adjustment	Percent Final Premium Full Premium	Bill code
U 💌 Uncom	+	10.00000 % of Final Premium to Split = \$40.40 \$134	.60 💌
•	+	% of Balance after 1st Split 🔽 =	•
•	+	% of Balance after 1st Split 🔽 =	•
•	+	% of Balance after 1st Split 🔽 =	-
•	+	% of Balance after 1st Split 🔽 =	
A Strict S		Excess = \$363.60 \$1,211	.40

- **Payors/Payees grids**: The CDF Payors and Payee grids now reflect the final premium amounts, not the CDF-disclosed amounts.
- A new Disclosures dialog was added: This dialog provides a view into both the owner's and loan policy premiums, including the traditional amounts and the CFPB regulated amounts, seller pay percentage and amounts, paid by buyer, seller, and other amounts, and POC amounts.
- See <u>examples</u> section.

Title Insurance Premiums Disclosures Dialog

This new dialog provides a view into the **title premiums as they will appear on the CDF lines and settlement statements**, including line details on **CDF page two**, **three**, and the **Register**.

- The disclosures dialog shows both the loan and owner's final and full premiums as they appear on the Title Insurance Premiums screen. The premiums can be edited on this dialog if Paid Before Closing, Paid by Others, or Paid by the Seller.
 - It is **not necessary** for users to enter/alter information in this dialog.
- The dialog is available on CDF orders when the **Show full premium on CDF/HUD-1** option is checked on the Title Insurance Premiums screen.

- This dialog does not write *back* to the Title Insurance Premiums (TIPS) screen. The *general* flow of data proceeds from the Title Insurance Premiums screen \rightarrow Disclosure Dialog \rightarrow CDF screens.
 - The Seller % is one exception; it will write back to the Title Insurance Premiums screen.
 - Another exception is that editing amounts on the CDF charges will always write back to the Disclosure dialog's CDF fields.
 - Note that you may always press the F2 key to reset the disclosure dialog fields with data from the Title Insurance Premiums screen.

Disclosures Dialog Details

The data entered for the <u>basic title order</u> example below will appear in the dialog as shown below.

• **Paid at Closing**: This tab provides a breakdown of the Final Premium/Settlement Statements/Register amounts as well as Full Premium/CDF amounts:

Disclosures				— ×	٢
Paid At Closing Paid Before	e Closing (POC)				_
1 Final Premiums/Settlemer	nt Statements/Regist	ter			
	Buyer	Seller	Other	Total	
Loan policy:	\$404.00	++	=	\$404.00	
Owner's policy:	\$1,678.00	+ +	=	\$1,678.00	
Owner's seller pay %:		%			
Total:	\$2,082.00			\$2,082.00	
2 Full Premiums/CDF					
	Buyer	Seller	Other	Total	
Loan policy (C.01):	\$1,346.00	++	=	\$1,346.00	
Owner's policy (H.01):	\$736.00	+ +	=	\$736.00	
Seller credit:					
Total:	\$2,082.00			\$2,082.00	
Show final premium on Settlement Statement Show full premium on Settlement Statement					
				Close	

- 1. **Final Premiums / Settlement Statements / Register**: This section reflects the data that will flow into the settlement statement & Payor grids on the CDF as well as the register.
- 2. **Full Premiums / CDF**: This data flows into the CDF lines/charges; changing this information on the CDF will also flow back into this dialog.

- The Show final premium on Settlement Statement and Show full premium on Settlement Statement options are related to the Simultaneous Issue checkboxes on the TIPS screen; these checkboxes/radio buttons stay in sync with one another.
 - When the radio buttons are changed on the Disclosures dialog, the checkboxes on the Title Insurance Premiums screen will change, & vice versa.
 - The radio buttons on the Disclosures dialog always tie to the Show full premium on Settlement Statement checkbox on the Title Insurance Premiums Screen.
 - If unchecked, the top radio button is selected.
 - If checked, the bottom radio button is selected.

Simultaneous Issue:		
Show both policy numbers on both policies		
Show full premium on CDE/HUD-1	-	Show final premium on Settlement Statement
	(Show full premium on Settlement Statement
Show full premium on Settlement Statement		
Show full premium on invoice		

 Here, the second radio button is selected on the Disclosures dialog, and the Title Insurance Premiums Screen checkbox synced automatically:

Simultaneous Issue:	rotai.	\$1,700.00
Show both policy numbers on both policies	Show final premi	um on Settlement Statement
Show full premium on CDF/HUD-1	Chawfull accession	n en Cettlement Statement
Show full premium on Settlement Statement		n on Settlement Statement
Show full premium on invoice		

- These two items do not impact the Individual Buyer and Seller Statements; these documents will always print the final premiums.
- **Paid Before Closing (POC)**: This tab provides a breakdown of the Paid Before Closing (POC) Final Premium/Settlement Statements/Register amounts as well as Full Premium/CDF amounts:

Disclosures			×
Paid At Closing Paid Before	e Closing (POC)		
1 Final Premiums/Settlemer	nt Statements/Registe	r	
	Buyer POC	Seller POC	
Loan policy:			
Owner's policy:			
Total:			_
2 Full Premiums/CDF	Buyer POC	Seller POC	
2 Full Premiums/CDF Loan policy (C.01):	Buyer POC	Seller POC	
2 Full Premiums/CDF Loan policy (C.01): Owner's policy (H.01):	Buyer POC	Seller POC	
2 Full Premiums/CDF Loan policy (C.01): Owner's policy (H.01): Total:	Buyer POC	Seller POC	

- 1. **Final Premiums / Settlement Statements / Register**: Any monies remitted outside of the closing by the buyer or seller may be input here and will flow into the payors grid under the related CDF charge.
- 2. **Full Premiums / CDF**: Any monies remitted Outside of the Closing by the Buyer or Seller may be input here and will flow into the CDF line/charge.
- Validations: If amounts on this dialog are out of balance in some way, validation icons will appear in the tab(s) at the top of the dialog as well as next to each field that has a problem; problematic fields will also be shaded yellow:

Disclosures				×
Paid At Closing Paid Be	fore Closing (POC)			
Final Premiums/Settlement	Statements/Register			b
	Buyer	Seller	Other	Total 🚽
Loan policy:	\$150.00 +		+	= \$150.00
Owner's policy:	\$300.00 +		+	= \$300.00
Owner's seller pay %:			%	Ļ
Total:	\$450.0			\$450.00
Full Premiums/CDF				
	Buyer	Seller	Other	Total
Loan policy (C.01):	\$400.00 +		+	= \$400.00
Owner's policy (H.01):	\$150.00 +		+	= \$150.00
Seller credit:				
Total:	\$550.0			\$550.0
Show final premium on S	Settlement Statement			
Show full premium on Se	ettlement Statement			
				Close

• In order to remove these validation errors, adjustments must be made to ensure that the **Total rows** at the bottom of each section (Final Premiums/Full Premiums) match:

Disclosures					X
Paid At Closing Paid Before	Closing (POC)				
- Final Premiums/Settlemen	t Statements/Regi	ster			
Lass askey	Buyer	S	eller	Other	lotal
Loan policy:		+	+		
Owner's policy:		+	+		=
Owner's seller pay %:			%		
Total:					
Full Premiums/CDF					
	Buyer	S	eller	Other	Total
Loan policy:		+	+		=
Owner's policy:		+	+		=
Seller credit:					
Total:					
Show final premium on	Settlement Statem	ent			
Show full premium on S	Settlement Stateme	nt			
					Close

- The Total of the **Loan Policy Final Premium** much match the **Final loan premium** on the Title Insurance Premiums Screen.
- The Total of the **Owners Policy Final Premium** must match the **Final owner's premium** on the Title Insurance Premiums Screen.

Dialog Access

The dialog is accessible from several locations:

- 1. Keyboard shortcut: Ctrl + Alt + D will display the Disclosures dialog.
- 2. **Title Insurance Premiums Screen**: the **Disclosures** button at the top of the screen will pull up the dialog:

00	Title Insur	ance Premiums	6	
Title In	surance Premium	losures		
Loan	Underwriter	Commitment	Policy	Title Insurance Premium
1			OP: LP:	OP: \$0.00 LP: \$0.00

3. Charge dialogs reflecting charges sent from the SI policy premiums:

H. Other Charges Charges for Line 01	C. Services Borrower Did Shop For Charges for Line 01
+-	+ -
Description Re	Description Re
 1 Title - Owner's Title Insurance (optional) 	1 Title - Lender's Title Insurance
Details Payors Payees 1 Title - Owner's Title Insurance (optional) Borrower-Paid At closing: \$736.00 Before closing: \$ Cost paid: At Closing Cost paid: At Closing Tolerance: None Title Premium Disclosures	Details Payors Payees 1 Title - Lender's Title Insurance Borrower-Paid At closing: \$1,346.00 Before closing: Cost paid: At Closing Cost paid: At Closing Tolerance: None Title Premium Disclosures

4. Charge dialogs reflecting charges sent from the SI policy seller credit:

-			
Description	Re	То	Borrower
1 Title - Adjustment for Owner's Premium			\$150.00
1 Title - Adjustment for Ousser's Prop. Por		Permeuver	¢150.00

Examples

Basic Title Order

This example walks through a simple title policy to demonstrate the changes present in this release.

- Title Insurance Premiums Screen: a simple simultaneous issue policy was created.
 - **Owner's Policy**: A final owner's premium of \$1,678 is present, along with a SI net owner's premium of \$736:

Owner's Policy		
owners roney		
Policy number:		
Coverage amount:	Prior policy adjustment:	
Seller pay %:	Seller pay amount:	
Final owner's premium:	\$1,678.00 - Transaction code:	-
SI net owner's premium:	\$736.00	
Remarks:		

• **Owner's Policy Split**: A 10% split is assigned to the underwriter:

<u>Split</u>					
Based on:	Premium Calculation	▼ Final Premiun	n 💌		
Premium to split:	\$1,678.00	Prior policy adjustment:	Final pren	nium to split:	\$1,678.00
Split to	Adjustment	Percent		Final Premium	Bill code
U v Unibra	+	- <u>10.00000</u> % of	Final Premium to Split 🛛 👻 =	\$167.80	-
-	4	- % of	Balance after 1st Split 💌 =		-
•	4	. % of	Balance after 1st Split 💌 =		•
-	4	. % of	Balance after 1st Split 💌 =		•
•	4	• % of	Balance after 1st Split 💌 =		•
A <u>Seattle'</u>			Excess =	\$1,510.20	

• Loan Policy: A \$1,346 Full Loan Premium and Final Loan Premium of \$404 are present:

Loan Policy		
Policy number:		
Coverage amount:	Prior policy adjustment:	
Seller pay %:	Seller pay amount:	
Final loan premium:	\$404.00 - Transaction code:	•
Full loan premium:	\$1,346.00	
Remarks:		

• Loan Policy Split: A 10% split is assigned to the underwriter:

Split					
Based on:	Premium Calculation	▼ Final Premiur	n 💌		
Premium to split:	\$404.00	Prior policy adjustment:	Final pre	mium to split:	\$404.00
Split to	Adjustment	Percent		Final Premium	Bill code
U v Unibra	4	+ 10.00000 % of	Final Premium to Split 🛛 💌	= \$40.40	-
•	H	+ % of	Balance after 1st Split 💌	=	-
•	H	+ % of	Balance after 1st Split 💌	=	-
•	H	+ % of	Balance after 1st Split 💌	=	-
•		+ % of	Balance after 1st Split 💌	=	-
A <u>Seattle'</u>			Excess	\$363.60	

- **CDF Page 2**: Title premiums and splits now display a bit differently on the CDF screens. The manner in which amounts are sent to the CDF Screen amount columns—and likewise the CDF documents—is exactly the same as before; **all that has changed are the payee/payor grids**:
 - Section C. Services Borrower Did Shop For: The Full Loan premium displays on the CDF line:

C.	Sen	vices Borrower Did Shop I	Бог			\$1,346.00		
		Description	Re	То	Name	Borrower-Paid At Closing	Borrower-Paid Before Closing	Se /
×.	01	Title - Lender's Title Insur		А	Seattle's Best Settlements	\$1,346.00		

• **Details Tab**: The **full loan premium** also displays in the **Details tab**:

Details	Payors P	ayees
1 [Title - Lende	's Title Insurance Re: To: A 💌 Name: S
	-Borrower-P	sid Seller-Paid
	At closing:	\$1,346.00 Before closing: At closing: Before closing:
	Cost paid:	At Closing Seller pay: % Bill code: Taxable
	Tolerance:	None Loan estimate: Fee type: Title Lenders Coverage Premium

• Payors Grid: The final loan premium shows in the Payors grid:

Deta	ails Payo	Payees					
	Code	Name	Amount	POC	Disburse POC	For	Pr
►	BA	Jonathan Edwards	\$404.00			BA	
	SA	Charles H Spurgeon				SA	

• Payees Grid: The 10% split is detailed in the Payees grid:

Det	ails Payo	rs Payees						
	Code	Name	%	Amount	Deducted	Held	Separate	Bill Code
►	A	Seattle's Best Settlements	90.00	\$363.60				
	U	Unibraü Undervichting	10.00	\$40.40				
*								

• Section H. Other: The SI net owner's premium displays on the CDF line:

н	. Other				\$736.00			
	Description	Re	То	Name	Borrower-Paid At Closing	Borrower-Paid Before Closing	Seller-Paid At Closing	S Befo
۲	01 Title - Owner's Title Insura		A	Seattle's Best Settle	\$736.00	←───		

• **Details Tab**: The **SI net owner's premium** also displays in the grid:

Details	Payors	Payees
1	Title - Owr	er's Title Insurance (optional) Re: To: A 💌 Name:
	- Borrower	Paid Seller-Paid
	Cost paid	At Closing Seller pay: % Bill code: Taxable
	Tolerance	: None Loan estimate: Fee type: Title Owners Coverage Premium

• Payors Grid: The Final owner's premium shows in the Payors grid:

Deta	ails Payo	Payees						
	Code	Name	Amount	POC	Disburse POC	For	Process As	Bill Code
►	BA	Jonathan Edwards	\$1,678.00			BA		
	SA	Charles H Spurgeon				SA		

• Payees Grid: the 10% split is detailed in the Payees grid:

Det	ails Pay	ors Payees							
	Code	Name	%	Amount	Deducted	Held	Separate	Bill Code	Invoid
►	A	Seattle's Best Settlements	90.00	\$1,510.20					
	U	Unibraü Undervichting	10.00	\$167.80					
*									

• **Register**: The two resulting checks to the Settlement Agent and Underwriter can be viewed under **Transactions > Disbursements**:

Balance Info	rmation:				Ledger Info	mation:		
Order balar Incoming fur Outgoing fur Total:	i <u>ce:</u> nds: \$2,08; nds: (<u>\$2,082</u> \$(2.00 <u>w/Per</u> 2.00) Receip 0.00) Disburs Total:	er balance: nding and Held: ts: \$2 sements: (\$2,	\$0.00 2,082.00 ,082.00) \$0.00	Trust accou Responsible Reminder d Ledger com	ant: TAC) v Insactions	Locked Dormant Exempt IOLTA
	Print and P	ost 🔻 🕛 Acti	ons 🔻 🔜 Reports	• Order	Transactions	Anticipated Wire	5	
Status	Туре	Amount	Payee/Payor	CDF	Trust Acct.	Ref. Number	Trans. Date	Cleared Date
Receipts - Pending Disburser	Receipt	\$2,082.00	Jonathan Edwards	1	TAC			
Pending	Check	\$1,873.80	Seattle's Best Se	. 1	ТАС	_		

 Underwriter disbursement details: The 10% splits for the underwriter—\$167.80 from the Owner's policy and \$40.40 from the Loan policy—are detailed in the Extended memo section with corresponding section numbers

General History	1		
Check type:	Pending To IBA	Check number:	
Medium:	•	Transaction date:	(None) 👻
Payee code:	U 💌	Amount:	\$208.20
Pay to the order of:	Unibraü Undervichting		
Address:			
City/State/Zip:		· · ·	- Foreign
Memo:	Title Charges		
Extended memo:	Title - Owner's Title Insurance (optional Insurance (C.01) \$40.40) (H.01) <mark>\$167.80;</mark> Title - Le	nder's Title
CDF/HUD-1:	1 💌	Cleared date:	(None)
CDF/HUD-1: Apply towards:	1 - Apply	Cleared date: Amount Des	(None) -
CDF/HUD-1: Apply towards:	Apply Apply to Closing	Cleared date: Amount Des \$208.20	(None) -
CDF/HUD-1: Apply towards:	1 ▼ Apply Apply to Closing Unapplied	Cleared date: Amount Des \$208.20 \$0.00	(None) -

Settlement Agent disbursement details: The 90% splits for the settlement agent—
 \$1,510.20 from the Owner's policy and \$363.60 from the Loan policy—are detailed in the Extended memo section with corresponding section numbers:

,

eck			?
General Histor	у		
Check type:	Pending To IBA	Check number:	
Medium:	▼	Transaction date:	(None) 💌
Payee code:	A 📼	Amount:	\$1,873.80
Pay to the order of:	Seattle's Best Settlements		
Address:			
City/State/Zip:		•	- Foreign
Memo:	Settlement Agent Fees		
Extended memo:	Title - Owner's Title Insurance (optiona Insurance (C.01) \$363.60	l) (H.01) <mark>\$1,510.20;</mark> Title -	Lender's Title
CDF/HUD-1:	1 -	Cleared date:	(None) 💌
Apply towards:	Apply	Amount De	scription
	Apply to Closing	\$1,873.80	
	Unapplied	\$0.00	

• **Disclosures Dialog**: The disclosures dialog reflects the following amounts for the above disbursements:

Disclosures				×	
Paid At Closing Paid Before (Closing (POC)				
 Final Premiums/Settlement 	Statements/Register				
	Buyer	Seller	Other	Total	
Loan policy:	\$404.00 +	+	=	\$404.00	
Owner's policy:	\$1,678.00 +	+	=	\$1,678.00	
Owner's seller pay %:		%			
Total:	\$2,082.00			\$2,082.00	
Full Premiums/CDF					
	Buyer	Seller	Other	Total	
Loan policy (C.01):	\$1,346.00 +	+	=	\$1,346.00	
Owner's policy (H.01):	\$736.00 +	+	=	\$736.00	
Seller credit:					
Total:	\$2,082.00			\$2,082.00	
Show final premium on Settlement Statement					
Show full premium on Se	ttlement Statement				
				Close	

• **Settlement Statement**: The rendered master settlement statement here will reflect the final premium amounts:

	Seller				Borro	wer
Debit	Cre	edit			Debit	Credit
			Escrow/Title Charges			
			Lender's Title Insurance to Seattl Settlements	e's Best	404.00	
			Coverage: 125,000.00	404.00		
			Owner's Title Insurance to Seattle Settlements	e's Best	1,678.00	
			Coverage: 150,000.00	1,678.00		
			Subtotals		2,082.00	
			Balance Due FROM Borrower			2,082.00
	0.00	0.00	TOTALS		2,082.00	2,082.00

Sales Tax and Policies

In this example the basic title order example above is used, with a few minor changes:

- Both the Loan & Owners policies are taxable.
- A **2% Tax rate** has been added to the settlement agent:

	Settlement Agent		
Settlement A	gent		
Lookup code:			📃 In
Name:	Seattle's Best Settlements		Ma
		~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~
Sales tax repo	rting	·····	
Description:	Sales Tax		
Tax rate:	2.00000 % (a) Tax is included in CDF amount		
Bill code:	Calculate total tax in CDF section	Services Borrower	Did Shop For 🛛 👻

• The Owner's and Loan Policy Premiums have the taxable checkbox selected:

Owner's Policy Premium and Split	Loan Policy Premium and Split			
Owner's Policy Premium	Loan Policy Premium			
Basis:	Basis:			
Coverage amount:	Coverage amount:			
Method: Default 👻	Method: Default 💌			
Rate table:	Rate table:			
Base premium: \$1,678.00	Base premium: \$404.00			
Prior policy adjustment:	Prior policy adjustment:			
Multiplication %: 100.00000	Multiplication %: 100.00000			
Simultaneous issue fee:	Simultaneous issue fee:			
Adjustment: +/-	Adjustment: +/-			
Final owner's premium: \$1,678.00	Final loan premium: \$404.00			
SI net owner's premium: \$736.00	Full loan premium rate table:			
Line: H.01  CDF: 1 Title - Owner's Tit	Full loan premium: \$1,346.00			
Seller credit to borrower:	Line: C.01  CDF: 1 Title - Lender's 1			

• The **Disclosures dialog** presents the following information, which includes tax amounts added to the premiums:

Disclosures				Ð	ĸ
Paid At Closing Paid Before	Closing (POC)				
Final Premiums/Settlement	Statements/Register				
	Buyer	Seller	Other	Total	
Loan policy:	\$412.08 +	+		\$412.08	
Owner's policy:	\$1,711.56 +	+		\$1,711.56	
Owner's seller pay %:		%			
Total:	\$2,123.64			\$2,123.64	
Full Premiums/CDF					
	Buyer	Seller	Other	Total	
Loan policy (C.01):	\$1,372.92 +	+		\$1,372.92	
Owner's policy (H.01):	\$750.72 +	+		\$750.72	
Seller credit:					
Total:	\$2,123.64			\$2,123.64	
Show final premium on S	Settlement Statement				
Show full premium on Se	ettlement Statement				
				Close	

• The **Payee grids** automatically split out the tax amounts:

Det	ails Pay	ors Payees								
	Code	Name	%	Amount	Deducted	Held	Separate	Bill Code	Invoice #	Description
►	А	Seattle's Best Settlements	88.24	\$1,510.20						
	U	Unibraü Undervichting	9.80	\$167.80						
-	A	Seattle's Best Settlement	1.96	\$33.56						
*										

Det	ails Paye	ors Payees							
	Code	Name	%	Amount	Deducted	Held	Separate	Bill Code	Invoice #
Þ	А	Seattle's Best Settlements	88.24	\$363.60					
	U	Unibraü Undervichting	9.80	\$40.40					
-	A	Seattle's Best Settlements	1.96	\$8.08					
*									
*									

 Settlement Agent disbursement details: In addition to the 90% splits for the settlement agent— \$1,510.20 from the Owner's policy and \$363.60 from the Loan policy—the tax amounts are also detailed in the Extended memo section with corresponding section numbers:

Check			? ×
General History			
Check type:	Pending To	IBA Check number:	
Medium:	-	Transaction date:	(None) 💌
Payee code:	A 👻	Amount:	\$1,915.44
Pay to the order of:	Seattle's Best Settlements		
Address:			
City/State/Zip:		▼	- Foreign
Memo:	Settlement Agent Fees		
Extended memo:	Title - Owner's Title Insurance (optional) (H.01) \$1,510.20; Ti Lender's Title Insurance (C.01	(optional) (H.01) <mark>\$33.56;</mark> Title - O tle - Lender's Title Insurance (C.0 ) \$363.60	wner's Title Insurance
CDF/HUD-1:	1 🔹	Cleared date:	(None) 🔻
Apply towards:	Apply	Amount De	escription
	Apply to Closing	\$1,915.44	
	Unapplied	\$0.00	
	Overage	\$0.00	
	Draft		
Auto-print transacti	on form		
		[	OK Cancel

#### <u>Seller Pay</u>

In this example the basic title order example is used, with one minor change:

• The **Owner's policy is paid 25%** by the seller.

Owner's Policy			
Policy number:			
Coverage amount:		Prior policy adjustment:	
Seller pay %:	25.00000	Seller pay amount:	\$419.50
Final owner's premium:	\$1,678.00	Transaction code:	-
SI net owner's premium:	\$736.00		
Remarks:			

• A line is not selected for the Seller credit to borrower:

Final owner's premium:	\$1,678.00	Taxable
SI net owner's premium:	\$736.00	
Line:	H.01 💌 CDF: 1	Title - Owner's Title Insurance (optional)
Seller credit to borrower: —	\$235.50	Line:

• This results in **validations (warnings)** appearing on the **Disclosures dialog** because the numbers are not in balance because a line has not been selected for the Seller credit to borrower:

Disclosures					×
Paid At Closing Paid Bef	ore Closing (POC)				
Final Premiums/Settlement	Statements/Register				
	Buyer	Seller	Other	Total	
Loan policy:	\$404.00 +		+	= \$404.00	
Owner's policy:	\$1,258.50 +	\$419.50	+	= \$1,678.00	
Owner's seller pay %:		25.00000	%		
Total:	\$1,662.50	\$419.50		\$2,082.00	
Full Premiums/CDF					511
	Buyer	Seller	Other	Total	
Loan policy (C.01):	\$1,346.00 +		+	\$1,346.00	
Owner's policy (H.01):	\$552.00 +	\$184.00	+	\$736.00	
Seller credit:					
Total:	\$1,898.00	\$184.00	$\checkmark$	\$2,082.00	
<ul> <li>Show final premium on S</li> <li>Show full premium on Se</li> </ul>	ettlement Statement ttlement Statement				
				Clo	se

- When the fields do not validate correctly, exclamation points will appear on the tab at top, as well as next to fields that are not properly in balance. Fields in question will also be shaded yellow.
- Errors are also presented in the Errors and Warnings panel:



• Once a CDF line is selected for the **Seller Credit to borrower**, the Disclosures dialog is brought into balance and the validation warnings are removed:

SI net owner's premium:	\$736.00			
Line:	H.01 🔻 CDF: 1	Title - Owner's T	Title Insurance	e (optional)
Seller credit to borrower:	\$235.50	Line: L.04/N.0	)6 🔻 CDF:	1
Disclosures				<b>—</b> ×
Paid At Closing Paid Be	fore Closing (POC)			
Final Premiums/Settler	ment Statements/Regis	ter		
	Buyer	Seller	Other	Total
Loan policy:	\$404.00	+	+ =	\$404.00
Owner's policy:	\$1,258.50	+ \$419.50	+ =	\$1,678.00
Owner's seller pay %:		25.00000	%	
Total:	\$1,662.50	\$419.50		\$2,082.00
Full Premiums/CDF				
	Buyer	Seller	Other	Total
Loan policy (C.01):	\$1,346.00	+	+=	\$1,346.00
Owner's policy (H.01)	: \$552.00	+ \$184.00	+ 📃 =	\$736.00
Seller credit (L.04/N.	D6): (\$235.50)	\$235.50		
Total:	\$1,662.50	\$419.50		\$2,082.00
Show final premium	on Settlement Stateme	ent		
Show full premium of	on Settlement Statemer	nt		
				Close

Note: There are other ways to fix this particular issue if you do not want to use a CDF
 Page 3 credit. You could manually edit the CDF Amount Columns to apply the rest of the
 \$419.50 that the seller is paying.

#### Paid By Others

In this example, the <u>basic title order</u> example is repeated; the only difference here is that a third party is paying for the Owner's Policy.

• Here is the basic title example; with all amounts balanced:

Final Premiums/Settlement Statements/Register							
	Buyer	Seller	Other	Total			
Loan policy:	\$404.00 +	+	=	\$404.00			
Owner's policy:	\$1,678.00 +	+	=	\$1,678.00			
Owner's seller pay %:		2	5				
Total:	\$2,082.00			\$2,082.00			
Full Premiums/CDF							
	Buyer	Seller	Other	Total			
Loan policy (C.01):	\$1,346.00 +	+	=	\$1,346.00			
Owner's policy (H.01):	\$736.00 +	+		\$736.00			
Seller credit:							
Total:	\$2,082.00			\$2,082.00			
Change Change and Change and Change and Change Change and Change a	ottlomont Statemon	•					

• Here, **\$736** is entered in the **Other column** for the owner's policy fields:

Paid At Closing Paid Be	fore Closing (POC)			
Final Premiums/Settlement	Statements/Register			
	Buyer	Seller	Other	Total
Loan policy:	\$404.00 +	+	=	\$404.00
Owner's policy:	\$1,678.00 +	+	\$736.00 =	\$2,414.00
Owner's seller pay %:		%		
Total:	\$2,082.00		\$736.00	\$2,818.00
Full Premiums/CDF				
	Buyer	Seller	Other	Total
Loan policy (C.01):	\$1,346.00 +	+	=	\$1,346.00
Owner's policy (H.01):	\$736.00 +	+	\$736.00 =	\$1,472.00
Seller credit:				
Total:	\$2,082.00		\$736.00	\$2,818.00
Show final premium on S	Settlement Statement			
Show full premium on Se	ettlement Statement			

• This **validation warning** appears, indicating that an adjustment needs to be made to compensate for the third party (Other) paying for the Owner's policy:

closures			<b>_</b>
Paid At Closing F	Paid Before Closing (POC)		
Final Premiums/Sett	lement Statements/Register		
	Buyer	Seller Oth	er Total
Loan policy:	\$404.00 +	+	= \$404.00
Owner's policy:	\$1,678.00 +	+ \$	736.00 = \$2,414.00
Owner's seller pay	%:	%	
T-1-1.	±0.000.00		

 $\circ$   $\;$  The total policy here is compared against the policy amount on TIPS  $\;$ 

E.	Owner's Policy Premium and	Split
	Owner's Policy Premium	
	Basis:	•
Other Total	Coverage amount:	
+ = \$404.00	Method:	Default 👻
+ \$736.00 = \$2,414.00	Kuto table:	-
9/	Base premium:	\$1,678.00

• This validation warning is also reflected in the Errors and Warnings panel:

Errors and Warnings	д	×
3 2 Errors 🚹 1 Warning 🕕 0 Messages 🍸		
Message		
Order cdf20160302		+
A COF Issiance is (\$756.00).		
Payor is empty on CDPIne number: H.01.		
Total final Owner's Policy premium on Disclosures screen (\$2,414.00) does not equal final Owner's Policy premium on Title Insurance Premiums screen (\$1,678.00). Adjust for buyer, seller, and other on Disclosures screen to total \$1,678.00.		
🔁 My Orders 🔯 Errors and Warnings 🖉 Search Results		

• The error can be resolved by reducing the Owner's policy amounts in the Buyer column by \$736, thus reducing the amount the buyer is paying:

Dis	closures					<b>—</b> ×
	Paid At Closing Paid Before	Closing (POC)				
	Final Premiums/Settlemen	t Statements/Register				
		Buyer	Seller	Other	Total	
	Loan policy:	\$40400 +	+	=	\$404.00	
	Owner's policy:	\$942.00 +	+	\$736.00 =	\$1,678.00	
	Owner's seller pay %:		%			
	Total:	\$1,346.00		\$736.00	\$2,082.00	
	Full Premiums/CDF					511
		Buyer	Seller	Other	Total	
	Loan policy (C.01):	\$1,34600 +	+	=	\$1,346.00	
	Owner's policy (H.01):	\$0.00 +	+	\$736.00 =	\$736.00	
	Seller credit:					
	Total:	\$1,346.00		\$736.00	\$2,082.00	
	Show final premium on	Settlement Statement				
	Show full premium on S	Settlement Statement				
					Clo	se

• This is how the Owner's Policy now appears on the CDF line:

H.	Oth	er				\$0.00				
		Description	Re	То	Name	Borrower-Paid At Closing	Borrower-Paid Before Closing	Seller-Paid At Closing	Seller-Paid Before Closing	Paid By Others
•	<u>0</u>	Title - Own		Α	Seattl	\$0.00	•		$\rightarrow$	\$736.00

• On the Payors tab, enter the applicable code for the party paying for the Owner's Policy:

	Code	Name	Amount	POC	Disburse POC	For	Process As	Bill Code
	BA	Jonathan Edwards	\$942.00			BA		
	SA	Charles H Spurgeon				SA		
•	•		\$736.00			BA		

	Code	Name	Amount	POC	Disburse POC	For	Process As	Bill Code
	BA	Jonathan Edwards	\$942.00			BA		
	SA	Charles H Spurgeon				SA		
•	0	Other Party	\$736.00			BA	Reduce Funds	TP

• The entire Final Owner's policy premium amount is always reflected on the Payee tab:

Di	sclosures	;					(	×				
	Paid At Closing Paid Before Closing (POC)											
	Final Premiums/Settlement Statements/Register											
	Buyer Seller Other Total											
	Loan	policy:	\$404.00	+	+	=	\$404.00					
	Own	er's policy:	\$942.00	+	+ \$736.0	0 = \$1	,678.00					
	Own	er's seller pay %:			3							
Det	tails Pay	ors Payees						_				
	Code	Name	%	Amount	Deducted	Held	Separate					
Þ	А	Seattle's Best Settlements	90.00	\$1,510.20								
	U	Unibraü Undervichting	10.00	\$167.80								
*												

#### Paid Outside of Closing

In this example, the <u>basic title order</u> example above is repeated, with the only difference being that the buyer has put money toward the Loan policy outside of closing and no tax was applied.

• Here's the basic title example; with all amounts balanced:

Final Premiums/Settlement	Statements/Regis	ster			~		<b>T</b>
Loop policy:	Suyer		Seller		Other	_	lotal
Loan policy.	\$404.00	+		•		=	\$404.00
Owner's policy:	\$1,678.00	+		ł		=	\$1,678.00
Owner's seller pay %:				%			
Total:	\$2,082.00						\$2,082.00
Loan policy (C.01):	81 346 00		Seller		Other	_	Total
Loan policy (C.01):	\$1,346.00	+	-	÷		=	\$1,346.00
Owner's policy (H.01):	\$736.00	+	-	÷		=	\$736.00
Seller credit:							\$2,082.00
Seller credit: 	\$2,082.00						
Seller credit: Total: Show final premium on S	\$2,082.00	ent					

• \$100 is input towards the Loan Policy Buyer POC field on the Paid Before Closing (POC) tab:

Disclosures	3
Paid At Closing Paid Before Closing (POC)	_
Final Premiums/Settlement Statements/Register	
Buyer POC Seller POC	
Loan policy: 100.00	
Owner's policy:	

- As a result, several warnings appear:
  - Paid Before Closing (POC) tab warnings:

Disclosures	<b>×</b>
Paid At Closing Paid Be	fore Closing (POC)
Final Premiums/Settlement Stat	ements/Register
В	uyer POC Seller POC
Loan policy:	\$100.00
Owner's policy:	
Total:	\$100.00
Full Premiums/CDF	iver POC Seller POC
Loan policy (C.01):	
Owner's policy (H.01):	
Total:	! -
	Close

• Paid at Closing tab warnings:

Discl	osures								×
!	Paid At Closing 🚦 Pa	id Before Closing (	POC	)					
	Final Premiums/Settlemen	t Statements/Regis	ster						
		Buyer		Seller		Other		Total	
	Loan policy:	\$404.00	+		+		=	\$504.00	!←
	Owner's policy:	\$1,678.00	+		+		=	\$1,678.00	
	Owner's seller pay %:				%				
	Total:	\$2,082.00						\$2,182.00	! 🔶
	Full Premiums/CDF								
		Buyer		Seller		Other	,	Total	
	Loan policy (C.01):	\$1,346.00	+		+		=	\$1,346.00	
	Owner's policy (H.01):	\$736.00	+		+		=	\$736.00	
	Seller credit:								
	Total:	\$2,082.00						\$2,082.00	!+
	Show final premium on	Settlement Stateme	ent						
	Show full premium on S	ettlement Statemer	nt						
								Clo	ose

• **Errors and Warnings** panel: You may double-click these items; the corresponding tab on the Disclosures dialog will open for corrections:

	Errors and Warnings	<b>ņ</b>	x				
	3 Errors 🗘 0 Warnings 🕕 0 Messages 🝸						
	Message						
	Order cdf20160302		_				
1	Total final premium paid by buver before closing on Disclosures screen (\$100.00) does not equal total CDF full premium paid by buyer before closing on Disclosures screen (\$0.00).						
2	Total final premiums on Disclosures screen (\$2, 182.00) does not equal total CDF full premiums on Disclosures screen (\$2,082.00).						
3	Total final Loan Policy premium on Disclosures screen (\$504.00) does not equal final Loan Policy premium on Title Insurance Premiums screen (\$404.00). Adjust for buyer, seller, and other on Disclosures screen to total \$404.00.						
	🔁 My Orders 👸 Errors and Warnings 🛩 Search Results						

- Explanations of these three warnings, as well as their resolutions, are as follows:
  - The \$100 for the Final Loan policy premium entered as a POC does not equal the Full Loan policy premium POC.
    - a. **\$100** needs to be added to the **Full Premium Loan policy because you must balance the final premium with the full premium**:

Disclosures		×
Paid At Closing Paid Bef	ore Closing (POC)	
Final Premiums/Settlement	Statements/Registe	r
	Buyer POC	Seller POC
Loan policy:	\$100.00	
Owner's policy:		
Total:	\$100.00	
Full Premiums/CDF		
	Buyer POC	Seller POC
Loan policy (C.01):	\$100.00	-
Owner's policy (H.01):		
Total:	\$100.00	
		Close

- The total of the Final premiums on the Paid at Closing tab does not match the total CDF full premiums.
  - a. Part of this error is resolved with bullet #3 below. However, you must
    - reduce the Final premium Loan policy by \$100:

Disclosures				<b>.</b>	3
Paid At Closing Paid Before	Closing (POC)				_
Final Premiums/Settlement	Statements/Register				
	Buyer 📕	Seller	Other	Total	
Loan policy:	\$304.00 +	+	=	\$404.00	
Owner's policy:	\$1,678.00 +	+	=	\$1,678.00	
Owner's seller pay %:		%			
Total:	\$1,982.00			\$2,082.00	

- The Final Loan policy premium on the Paid at Closing tab doesn't equal the final loan policy on the Title Insurance Premiums screen.
  - a. Reduce the **Loan policy full premium** by **\$100** so that the total of the **loan policy premium** will now match the Title Insurance Premiums screen.

Loan policy (C 01):	\$1,246,00	+	+	=	\$1,346,00
Owner's policy (H.01):	\$736.00	+	+	=	\$736.00
Seller credit:					
Total:	\$1,982.00				\$2,082.00
Show final premium on S	ettlement Statem	ent			
Show full premium on Se	ttlement Stateme	nt			

• The **CDF Grid will display these amounts** in the two columns shown here:

## C. Services Borrower Did Shop For

### Charges for Line 01

+	_					
	Description	Re	То	Borrower-Paid At Closing	Borrower-Paid Before Closing	Sel At
▶ 1	Title - Lender's Title Insurance		Α	\$1,246.00	\$100.00	-

## • The **Payors grid** for the Loan Policy Premium appear as follows:

[	Details Payors Payees								
		Code	Name	Amount	POC	Disburse POC	For	Process A	
	•	BA	Jonathan Edwards	\$304.00			BA		
		SA	Charles H Spurgeon				SA		
		BA	Jonathan Edwards	\$100.00	V	← 🗉	BA		

## **Settlement Statements**

The CDF Settlement Statements were updated show the **Final Premiums** instead of the **Full Premiums** inside the debit columns rather than as a note inside the description column. Individual Settlement Statements for orders created with v4.1 or higher will always disclose the final premium amounts in the center details column since these documents utilize the payor amounts to determine transactions. *300131* 

See the Paid Outside of Closing (POC) Example above to review the numbers given below.

#### Example One

- If the Show final premium on Settlement Statement radio button is selected on the Disclosures dialog (the Show full premium on Settlement Statement checkbox on TIPS will be unchecked), the Settlement Statements will show the Final Premium fields in the Seller and Borrower columns, as well as in the center details column.
  - Disclosure Dialog (Paid at Closing Tab & Paid Before Closing Tab): Note carefully the data reflected in the **top half** of the dialog:

Declasses					
Paid At Closing Paid Before	Closing (POC)				
Final Premiums/Settlement	Statements/Register				
	Buyer	Seller	Other		Total
Loan policy:	\$304.00 +		+	=	\$404.00
Owner's policy:	\$1,678.00 +		+	=	\$1,678.00
Owner's seller pay %:			%		
Total:	\$1,982.00				\$2,082.00
Ital Premiume CDF					
	Bayer	Seler	Other		Tatal
Low golicy (C.01)	81(246/38) =		*	•	81.346.003
(Densel's publicy (#127))	\$736.00 =		*	•	\$736.001
Seler cendi					
Test	81,362-38				6230230
Box/Indipentian on 3	idlienent Sidenent				
O Stor/Giperion on Sec.	etienenti Sukenenti				
					Orm

Diefenares			
Paid At Closing Paid Before	e Closing (POC)		
Final Premiums/Settlemen	nt Statements/Registe	er	
	Buyer POC	Seller POC	
Loan policy:	\$100.00		
Owner's policy:			
Total:	\$100.00		
Fall Premiume CDF			
	Buyer POC	Saller PDC	
Low policy (C.01)	#HII(III)		
Owner's publicy (#121)			
Test	\$10.31		
			Ches

 TIP screen checkbox/Disclosure Dialog options: Note that these two radio buttons are the same as the checkboxes on the Title Insurance Premium Screen; changing this option in TIP will change the Disclosure dialog, and vice versa:



#### • Rendered Master Settlement Statement:

Seller				Borrow	er	
Debit Credit				Debit	Credit	
		Escrow/Title Charges				
		Lender's Title Insurance to Seattle's Be	est	304.00		
		\$100.00 paid outside closing by Borr	ower			
		Coverage: 125,000.00	404.00			
		Owner's Title Insurance to Seattle's Be Settlements	est	1,678.00		
		Coverage: 150,000.00	1,678.00			
		Subtotals		1,982.00		
		Balance Due FROM Borrower			1,982.00	
0.	0.0	0 TOTALS		1,982.00	1,982.00	

- The total final premium paid by all parties shows in the details.
- The final premiums show in the Credit/Debit columns.
- The borrower is paying **\$100.00** of the Owner's premium outside of closing.
- The \$404.00 in the details column represents the Loan Policy's Final Premium
   Total before the Paid Outside Closing (POC) amount have been applied.
- Note: If the Show final premium on settlement statement radio button is selected, the Seller credit amount will not print on the Settlement statements.
  - When the final premiums are shown, there is no need for the seller credit to show; this is only needed when the full premiums show on the settlement statements.

### <u>Example Two</u>

- If the Show full premium on Settlement Statement radio button is selected on the Disclosures dialog AND the Show full premium on Settlement Statement checkbox on TIPS is checked, the Settlement Statements will show the Full Premium fields in the Seller and Borrower columns, as well as in the central details column.
  - Note that these two radio buttons are the same as the checkboxes on the Title Insurance Premium Screen; changing this option in TIP will change the Disclosure dialog, and vice versa.
  - Disclosure Dialog (Paid at Closing Tab & Paid Before Closing Tab): Note carefully the data reflected the **bottom half** of the dialog:

had famoures						1
Paid At Closing	Damy (PDD)					
Red Persons Sellement	Subervents Register					
	Bayer	Saller	Other		Teld	
Low golicy:	\$30x.30) =		*	] = [	\$404-33	
Owner's guiley:	81(678-33) =		*	] = [	81(070.00)	
Owner's seller pay %			8			
Tatal	81.382-38				62,002,00	
Full Premiums/CDF						
	Buyer	Seller	Other		Total	
Loan policy (C.01):	\$1,246.00 +		+	=	\$1,346.00	
Owner's policy (H.01):	\$736.00 +		+	=	\$736.00	
Seller credit:						
Total:	\$1,982.00				\$2,082.00	
O Dave final premium on 5	atterent Suberent					
<ul> <li>Stov Grjennum un Sa</li> </ul>	Beneril Salement					
					0	

Distances			
Paid Before	e Closing (POC)		
Real Prentumer Settlement	6 Suberverille Megada	,	
	Buyer POC	Saller POC	
Loar golky:	813.3E)		
Owner's publicy:			
Teal	areas		
Full Premiums/CDF			
	Buyer POC	Seller POC	
Loan policy (C.01):	\$100.00		
Owner's policy (H.01):			
Total:	\$100.00		
			Chan

 TIP screen checkbox/Disclosure Dialog options: Note that these two radio buttons are the same as the checkboxes on the Title Insurance Premium Screen; changing this option in TIP will change the Disclosure dialog, and vice versa.



• Rendered Master Settlement Statement:

Seller					Borro	wer
Debit	Debit Credit				Debit	Credit
			Escrow/Title Charges			
			Lender's Title Insurance to Seattle's Bes Settlements \$100.00 paid outside closing by Borrov Coverage: 125.000.00	t wer 1.346.00	1,246.00	
			Owner's Title Insurance to Seattle's Best Settlements Coverage: 150,000.00	736.00	736.00	
			Subtotals		1,982.00	
			Balance Due FROM Borrower			1,982.00
(	0.00	0.00	TOTALS		1,982.00	1,982.00

- The full premiums show in the Credit/Debit columns.
- The borrower is paying **\$100** of the Owner's premium outside of closing.
- The \$1,346,00 represents the Owner's Policy Full Premium Total before the Paid Outside Closing (POC) amount has been applied.

## CDF

## Page1

• The first column of the **Projected Payments** section now displays fields in which the user can enter **both Minimum and Maximum payments**. 306867

pane	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	h~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	<i>\^^~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~</i>
Principal & Interest				
Mortgage Insurance				
Estimated Escrow				
ليحيد ومعرفين والمراجع و	and a second and a second s		ميري محيد بيد سيم محمد محمد الم	and the second sec
<u>~~~~</u>	<u> </u>			
Estimated Total				
Monthly		<b></b>	3	
Payments				
warmer and				

## Page 2

• A Fee Type column has been added to the Fees tab in Section E. This was added for use in lender integrations and MISMO XML export. 281174

Fees	Details	Payors	Payees							,
F	Fee Schedule Type			Pages	Document	Fee Schedule	Amount	Seller Pay %	Fee Туре	
*	*									

• The **seller pay** % has been enabled for all charge types—excluding prorations—whenever the amount is blank or not user-entered. 287320

## **Percent Charges**

• An **Other amount field** (item **2** below) has been added to percent charges. This will allow the user to calculate a CDF line charge—such as commissions—off of any amount: 306863

Percent Calculati	on	
	Other 🔽	2 d to neare
Adjustment +/-:	Loan Amount Salas Drisa	
	Loan Premium	
	Owners Premium	
	Other	

• When the **Other** option (1) is selected, the **Other Amount field** (2) will become active so that a manual entry may be added.

## Options

 An Include additional disbursements from broker's commission amount checkbox has been added; checking this will print the amounts on the CDF Attachment and Settlement Statements. This checkbox is available when the Print additional disbursements from broker's commission checkbox is selected. 307286

Print additional disbursements from broker's commission

Include additional disbursements from broker's commission amount

• Use Individual Settlement Statement rules to calculate buyer/seller receipts and disbursements: The Individual Buyer and Seller Statements will always print the final premiums regardless of whether or not the "Show final" or "Show full" premium radio button option is checked on the title premium <u>Disclosures dialog</u>.

# ProTrust

- The **Book Balance Report (Transaction Date)** was incorrectly including a line item for ledgers containing voided transfer(s) posted in the prior month, but no other transactions posted in the current month of the report range. *312387, 307997*
- Changing the transaction date of a disbursed transferred fund transaction was removing it from the **Disbursed Transferred Funds report by Trust Accounting Date**. 278664
- Changing the transaction date of a disbursed transferred fund transaction was removing it from the **Disbursed Transferred Funds report by Transaction Date**. 234440

# API/SDK

- The Select SDK now requires Visual Studio 2015; it will no longer support Visual Studio 2010.
- Documents & reports may now be rendered through the API. 73150

## Installation

• **Prior to installation**, the .NET 4.6.1 framework files must be present on the local system. These files are included as a part of the client and server installation processes. When connecting an older version (pre-4.1) of the client to an upgraded version (4.1+) of the server, the .NET framework files will not automatically be downloaded for the client installation, so a manual installation of either the client or the .NET framework may be required. *315849*, *315865* 

# (4.1.1) 5/21/2016

# SPAdmin

## Managers

## <u>Policy</u>

- The policy reissue rate will now only apply up to the face amount of the new policy. 20980
  - This new **Calculation setting** option on the Prior Policy tab allows the user to override this setting:

New Policy	,			? 💌			
General	Owner's Policy	Loan Policy	Prior Policy	Guaranty Fees			
Calcula	ation settings						
Allow adjustment to be based on higher coverage amount? O Yes  No							

# ProForm

## Order

## <u>Documents</u>

- The document selection dialog now lists items in alphabetical order. 321243
- Invoice footers were including the user name & domain; only the user name was needed. 321896
- After moving documents from Available ReadyDocs to Selected ReadyDocs, the selected item wasn't highlighted. This occurred when Windows themes were turned off. 321779

## <u>Reports</u>

- In certain situations, when rendering reports, checkboxes on the prompt dialogs were incorrectly defaulting to being checked. 322851
- Select was shutting down when users attempted to stop a rendering report by clicking the **X** on the report tab. 323896
- In a specific scenario, custom report parameters weren't displaying values. Errors were arising when the application attempted to parse interactions with stored procedures containing no parameters. 325300

## <u>Technical</u>

- The Document Publishing API was disposing of active streams before post-processing print pipeline handlers could execute.
  - An example of this scenario is demonstrated in the Select SDK in the How-To/Print Pipeline/Add a Print Job Handler help. Select now returns valid stream objects for items in the printJob.OriginalItems collection. 327297
- An archiving fix made to SPAdmin in v4.0.5.3 has been added to this release. 321926

- This fix was as follows:
  - Documents could be corrupted when attempting to save while the archive process was running. 284106
- Upgrades from 4.0.5.3 are now supported. 321927

# Pro1099

## Records

• Profiles associated with 1099 records weren't properly set to their orders' owning profiles. 311884

# (4.1.2) 6/1/2016

# ProForm

## Order

<u>Register</u>

• Users are now able to send funds to a line from the register when the Use optional Closing Disclosure forms for transactions not involving seller option is checked. 298591

## **Documents**

• Select was crashing if users closed the documents tab before it completely loaded. 329575

# SPAdmin

## **Custom Fields**

• The maximum length of a custom field's ConditionCode formula has been increased from 1024 to 2048 characters. 287118

# (4.1.3) 6/6/2016

# Technical

## Server

• The Select server service (spssvc.exe) was running in 32-bit mode instead of 64-bit mode. 330547

# (4.1.4) 6/21/2016

# Reports

• Certain reporting dates were one day off of the date range entered by the user. 331442

# Technical

## Upgrades

• Select upgrades were failing when the ALTA document bundle installed in the database was a newer version than the version to which Select was being upgraded. 331127

# (4.1.5) 7/25/2016

# Pro1099

• Creating an IRS submission file was failing when the TCC code was associated with many profiles. 314352

# ProForm

## Order

### Closing Disclosure Form

- An error was occurring when two templates were applied and the first template contained charges which took up all lines available in a given section of the CDF. 319894
- Lines that were deleted from CDF Page 2 of a CDF template were incorrectly showing up in new orders created off the template. 295831

## Documents

### <u>Attachments</u>

• In certain situations, Windows Server 2012 users were experiencing application crashes after searching on the Attachments screen & then clicking outside of the Attachments screen. 319880

## <u>Edit Mode</u>

• An Object reference error was occurring when users searched for ReadyBlocs & then doubleclicked an item in the search results. 331896

## Reports

• Users were unable to print crystal reports due to directory path error. 323727

# ProTrust

## Transactions

• When reconciling by trust accounting date, users were unable to reassign a cleared transaction or clear a reassigned transaction due to a trust accounting date validation. 281884

## Reports

Escrow Trial Balance (Balances only) – Daily and Monthly –

• The **Escrow Trial Balance (Balances Only)** Report by Transaction Date was not correctly pulling the "Last Activity Date." 334145

### <u>IOLTA</u>

• The IOLTA report by Transaction Date was not correctly pulling the "Last Activity Date." 335758

# **SPAdmin**

## Managers

• Assigning a large number of profiles to the same manager was generating a "could not execute query" error due to a character limit within the application. 325509

### Check Printing

• Upgrades from 4.0 to 4.1 were disassociating custom checks from the check printing manager. 333827

### Fee Schedules

• The Fee Schedule Manager wasn't allowing a sufficient number of digits to ensure the accurate transferring/recording of tax calculations on larger amounts. 329129

# **Getting Help with SoftPro Select**

# Accessing Help

You may also use the F1 key at any time to view and print hundreds of how-to topics that are related to your location in the program. You may also press the 🕢 button in the toolbar to access help. The help system is designed to answer most of the questions you will have as you use the program.

# **Technical Support**

The SoftPro Solution Center is available to you by telephone at (800) 848-0143 and is open from 8:00 A.M to 5:00 P.M. Monday–Friday during your local time. Platinum level support hours are from 8:00 A.M to 10:00 P.M. EST Monday–Friday and 11:00 A.M. to 2:00 P.M. EST on Saturday.

You can extend technical support service by subscribing to SoftPro's Annual Maintenance Service program. Subscribing to Platinum Maintenance Service gives you access to technical support for longer hours Monday–Saturday. For more information, call SoftPro Sales at (800) 848-0143. You can email SoftPro Sales at <u>sales@softprocorp.com</u>.