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What's New in Impact/SQL 6.0 build (065)?

This document outlines new and updated features introduced in the Impact/SQL version 6.0.0, build (065) release. For information about updates to other versions of the software, visit the documentation page of our website at www.digisolaz.com/docs/documentation.htm.

Enhancements and modifications are presented in the appropriate module sections below as most apply to only one module of Impact/SQL. Please contact us if you have any questions or comments.

General Features

1. Some of the Subdivision table fields and associated fields in Escrow and Title have been lengthened. The Name has been expanded from 32 to 60 characters. The Map Book and Map Page fields have been expanded from 6 to 20 characters. The "Sav" file that feeds the Title Instructions has been modified to accept the longer fields, so the customized Title Instructions may need to be updated at some sites. (SRS 13324)
2. The Change_Date column, in both the EscMst_Escrow and OrdMst tables, has been expanded to include the time. (SRS 15738)
3. The Name Search function has been updated to include Unit # under the Subdivision search. (SRS 18482)
4. The Code Book printing function has been moved within the document maintenance DLL shells (for Title and Escrow), so a separate executable is no longer required. (SRS 18809)
5. Some clean-up work was done, involving the use of [=addressee #s=] and PRIVATE field combinations, so that phone and fax numbers that are in the NAF are now presenting properly. (SRS 18373)
6. The Title and Escrow DDE field sets have been expanded to include home and cell phone numbers for all buyers and sellers (1-8). (SRS 8682)

7. The Selling, Listing, Other Broker and Source of Business e-mail addresses are now available for use on Title Instructions. The customized Title Instructions will need to be modified to present any of these fields. (SRS 15932)
8. A new process has been introduced to manage product and user licensing. This change requires the .NET 2.0 Framework to be installed (already a requirement for Impact/SQL 5.12 (042)). A service is introduced to facilitate communications, between the client system and DSI's licencing database, over the Internet. The new License Manager is detailed in a separate document (The License Manager in Impact/SQL 6.0). (SRS 17823)
9. A change has been made in the DOT's, incorporating a Win2PDF macro to allow for hyperlinks in a PDF document. This feature will require a new Win2PDF font helper, which has yet to be released by Win2PDF. (SRS 19539)

Escrow

1. The ability to delete both offsetting entries, created on a HUD/Settlement Statement when Debit/Credit, Credit/Debit or Prorate is checked, has been added. When unchecked, the user will be asked if both entries are to be deleted or just the entry they have unchecked. This applies to the HUD100, HUD200, HUD210, HUD 400, HUD500 and HUD510 sections. (SRS 1287)
2. Changes were made to the treatment of foreign sellers with regard to 1099's. The previous process of not allowing a TIN to be entered was incorrect. (SRS 6706)
3. A new field has been added to the Listing, Selling and Other Broker sub-agents screens for the agent's name (in addition to the company name already provided for). (SRS 7057)
4. A setup option has been added that will provide for the clearing of the Closed Date and Recorded Date values, entered when a Fee Slip/Check is cut, when a Fee Slip/Check is voided. (SRS 10668)
5. The system has been modified to warn a user when an item being flagged withheld (WTH) from a lender's funds, unless there are sufficient funds available from the lender. A prompt is displayed if the amount being withheld is greater than the funds available. (SRS 12433)
6. Two new DDE fields are available to Escrow documents: the Internal Title Officer name and initials (from the first screen of Initial Questions). (SRS 12508)
7. The Escrow DDE field set has been expanded to include work phone numbers for all buyers and sellers (1-8). (SRS 10901)
8. The "Subject to" field, from the Title Information screen of Initial Questions, is now available as a DDE field for use in Escrow documents. (SRS 13038)
9. The Deed Amount, from line 1203, has been made available as a DDE field for Escrow documents. (SRS 15414)
10. The ability to add, modify and delete receivables has been added as an option. The option is set on the Escrow Setup Options tab. (SRS 16028)

11. A field has been added for the entry of the Disbursement Date. This field has been added to the HUD forms. The field is available to the Settlement Statements, which are customized by site. (SRS 17696)
12. Impact has been updated (in 5.12, build 034, but re-reported here for 6.0) to reflect the new Texas Title Rates, effective 2/1/2007. (SRS 17907)
13. The ability to specify, when printing the HUD, that you wish to have the Commission Breakdown (including sub-agents) as an attachment to the HUD has been added. (SRS 18160)
14. An option has been added to the Escrow Setup Options to have the system prompt for a full address when one is missing from a check that is about to be printed. (SRS 18479)
15. The HUD line 504 verbiage has been changed to read "See Addendum" when there are payoffs, instead of the default description of "Payoff First Mortgage Loan". (SRS 18483)
16. The Excel Settlement Statement has been modified to present the Yield Spread Premium (YSP) description, in addition to the amount. (SRS 13881)
17. The Excel Settlement Statement has been modified to properly present the rent schedule from the worksheet style of entry. (SRS 18782)
18. When generating a Log Book, Escrow Officers will have access to their files only, rather than for any Escrow Officer in the branch. Only the Escrow Manager access level can print a report for any/all Escrow Officers in a branch. (SRS 15891)
19. The legal-size HUD 1-A certification page has been modified to not overflow to a second page, and the irrelevant "Seller" signature lines have been removed. (SRS 16414)
20. In the situation where the system setup option for Worksheet Style of Entry Only was selected AND the setup option for Escrow Prelim Distribution List was not selected, the "Next" button was not appearing on the Title Information screen, precluding the ability to go to the Order Title Search screen directly. This has been corrected. (SRS 16571)
21. For those sites utilizing the MTS integration (currently restricted to Mercury Companies entities), a flag has been added, that will be sent to MTS, to indicate that the property data was selected via one of the property search integrations (DataQuick, First American RES or MarketPro). (SRS 16646)
22. The Property County DDE field, available to Escrow documents, was too short and was cutting off data from the field in Impact. The DDE field has been expanded from 20 to 50 characters. (SRS 17226)
23. When a file copy was done, and the original file was non-reportable (1099-S), the target file was receiving the non-reportable status but was still reflecting as "Unknown" on the Closing Report until the user physically opened the Sales Price/IRS screen on the target file. This is no longer necessary. (SRS 17417)
24. The Conversation Log can now be e-mailed (the button had previously been grayed out, improperly). (SRS 17767)
25. HUD line 602's description was being cut off (dropping the last "0")...this has been corrected. (SRS 18259)

26. The file copy function has been changed in order to prevent users in one branch inadvertently copying over a file in another branch. A file from one branch can not be copied into a file in another branch unless the user is assigned to branch 999 or has an access level of Utilities or Floater. A warning message, stating the copy being attempted involves files in different branches, will appear when such a copy is attempted by a user with sufficient rights. Once confirmed, the copy will be completed. (SRS 18409)
27. The 5.12 upgrade introduced an inadvertent display issue with the Title Officer dropdown, on the Title Information screen of Initial Questions – the Employee ID was appearing next to the names in the dropdown, when it should not have been. This has been corrected, and only the names appear. (SRS 19354)
28. The behavior of the amount fields on the Payoff screens has been restored to that before 5.12...specifically, when a user clicks in the amount fields with the mouse, the “0.00” entry is highlighted and is therefore replaced when a new amount is entered, as opposed to being left-appended to. (SRS 19393)
29. An issue inadvertently introduced in 5.12, regarding the inability to change the bank on a file with the first receipt, if that first receipt were a WIN, has been corrected. (SRS 19555)
30. The policy typists initials have been added to the Escrow File Status screen. (SRS 18480).

Title

1. E-mail notifications to Title, triggered by the Batch Processor, in lieu of printing Title Instructions, now include the following data fields: Transaction Type, Property Address, County and Special Instructions. (SRS 19358)
2. When the system is configured to e-mail, rather than print, the Title Instructions if an order is cancelled the e-mail now indicates the order was cancelled. (SRS 19732)
3. The Policy Number search results window has been re-worked to display more than 50 returned records, if there are over 50. (SRS 16198)
4. The ability to handle terminated Title Officers on Direct Orders, in the same manner as terminated Escrow Officers and Processors on Escrow files, has been added. A terminated Title Officer will still be reflected in the TO dropdown, when the Direct Order is edited, for files the TO was assigned to, until the assignment is changed; a new TO assignment will not be forced on the user by the old TO being removed. (SRS 17804)
5. The Property State field has been made available for use on Submission Reports. This was requested during a review of an electronic submission data file by United General. They also asked for Lender Name and Owner Name from the policies, but as these are within the policy Word doc, that request cannot be met. Submission reports will need to be modified to present the Property State field, as these are “semi-custom” reports. (SRS 18194)

6. The Print Title Instructions dialog box, within Title, has been modified so that it remains open after printing requested instructions, until the user clicks on Cancel, so that multiple sets of instructions can be printed without re-selecting the menu entry. (SRS 18213)
7. To ensure no changes have been made to policy jackets that are incorporated into policies, the Title.dot file has been modified to refresh all fields prior to printing of policy documents; rather than relying on the user to hit F9 before printing. (SRS 19692)
8. Prelims received from either LFC or MTS have their DDE fields updated and saved, when being released to Escrow. This only applies to sites configured for the LFC or MTS integrations (Mercury Companies only, at this time). (SRS 19705)
9. The policy typists initials have been added to the Direct Order File Status screen. (SRS 18480)

Accounting

1. It is now possible to view the details of incoming and outgoing wires from the ledger display. (SRS 5853)
2. The cleared status indicator ("C") is now presented on the ledger display for incoming and outgoing wires. (SRS 12397)
3. All banks should be assigned to Accounting (Branch 999), if they are in use. An audit function has been added to test whether active banks are in fact all assigned to the Accounting branch. The function does not make the assignment if it is not in place, it simply brings the situation to the audit report reader's attention. (SRS 6793)
4. The ability to reassign open files to different Title Officers is now available. This is similar to the reassignment of Processors on files. (SRS 12818)
5. The system-generated Enter Date (new file creation) and the fee slip/check cut date (file Close Date) have been added to the Audit Trial Balance. (SRS 15798)
6. The ability to "lock" escrow accounting data, one file at a time, permitting viewing only, has been added to the Accounting module. Granting of the authority to users to set and remove the locks is controlled in Password. Receipts, checks, wires and voids of any kind will all be locked. An updated Password report details who has the authority granted to them. (SRS 15821)
7. The ability to mark an Impact bank as "Closed" has been added. Currently Impact/SQL has the ability to mark a bank account as inactive which prevents those without accounting access to use or see the account. This change will allow a bank to be marked as closed at the bank level. A bank thus marked may not be transacted against by any user. A bank can only be closed if there is a zero balance on the Trial, there are no outstanding (uncleared) items, and there are no unposted items for it. Some cleanup of the functionality relating to "Inactive" banks was done, in conjunction with the addition of the "Close Bank" functionality. (SRS 16158)

8. The reconciliation filter for Arrowhead Bank has been modified to work with negative dollar amounts, after the bank changed its export file. (SRS 19473)
9. A positive pay filter has been added for Central Pacific Bank. The ABA number (routing number) for the bank must be supplied via a file (in \DATA) called CentralPacificBank.dat. (SRS 16580)
10. A positive pay filter has been added for Citibank. The "bank code" must be supplied via a file (in \DATA) called Citibank.dat. (SRS 16864)
11. A positive pay filter has been added for City National Bank. (SRS 16911)
12. A positive pay filter has been added for Wachovia Bank. The "bank number" must be supplied via a file (in \DATA) called WachoviaBank.dat. (SRS 18048)
13. A new positive pay filter has been added to support the new US Bank (CSV) format that requires that voided checks show the date of the file's creation, rather than the date of the void. This format is identical in all other respects to the existing US Bank (CSV) filter. (SRS 18815)
14. Comerica Bank has indicated that there should not be a header record nor blank line at the top of their positive pay files, so that filter has been altered to meet that specification. (SRS 18838)
15. Changes were made to the 1099-S export file for delivery to the IRS after year end, to accommodate IRS requirements. (SRS 18050 & 18182)
16. A setup option has been added to provide a prompt to the user, prior to posting of a reconciliation, to remind them of the need to print the three reconciliation reports. (SRS 18481)
17. The reconciliation, outside services, standard BAI filter will now recognize BAI Code "395" as an exception item. (SRS 16643)
18. A reconciliation option has been introduced to provide for deposit slips to be cleared only by a match on ticket number, and not solely on a dollar amount match. (SRS 16645)
19. A change was made in the queries behind the Quick Accounting Audits so that they will run more quickly and will not be interfered with by other processes, to the extent possible. (SRS 19070)
20. A scenario existed with Savings accounts through which the system was confused with SAV receipts that zeroed out savings files being followed by an outgoing wire transaction on the parent escrow; the system applied the SAV amount to the escrow file, rather than the savings ledger, and so said there were insufficient funds to be wired. This has been corrected. (SRS 16563)
21. When a file was transferred from one branch to another, with a different bank, and there were posted and unposted items which resulted in a zero file balance, the branch change occurred properly but the bank change did not. This has been corrected. (SRS 16616)
22. The transfer function was not handling the circumstance when the "from" file had a negative balance. This has been corrected. (SRS 16644)
23. The acceptable number of branch/bank combinations in a day's posting data set has been increased to 600, after a client reached the previous 300 combination limit. (SRS 16652)

24. The CompanyName parameter was not being passed to the Income Detail and Summary reports, in Accounting, so the Crystal Reports needed to be hard coded with the company's name (or did not have the company name presenting)...and if the company name changed, the reports needed to be re-edited. The parameter now passes so this should not be an issue going forward, once the existing reports are edited to present the parameter value (which many already are configured for). (SRS 17250)
25. Transferring a file from one branch to another while also selecting a new Escrow Officer was failing to update the Escrow Officer. This functionality has been corrected. (SRS 17819)
26. A posting error was occurring when a savings account was opened, offsetting receipts entered in the savings account resulting in a zero balance and the savings account was deleted, all on the same day. This resulted in Impact having no savings account to post the receipt activity to. The savings account will no longer be available for deletion while any activity is waiting to be posted to it. (SRS18381)
27. It is no longer possible to have an inactive bank be flagged as the default bank for a branch. (SRS 19142)

MIS

1. A discrepancy in open order counts that existed between two standard MIS reports (Open Escrows by Escrow Officer – EOFOPEN.rpt – and Activity Summary by Escrow Officer – EOFSUMM.rpt) has been corrected. (SRS 15777)

Utilities

1. The number of entries in the Subdivision table has been increase from 999 to 9,999. (SRS 13198)
2. The View/Clear Locks function, under Tools, has been expanded to include the Documents and Policies tables. (SRS 17017 and 17019)
3. The Branch report has been changed to present which branches are inactive, and to present the e-mail address assigned to each branch. (SRS 17401)