



# Impact / SQL

## Version 7.6

**Document Maintenance  
Supplement for SmartTags**



# Table of Contents

<b>Table of Contents .....</b>	<b>i</b>
<b>Introduction.....</b>	<b>1</b>
<b>General Information and Helpful Hints.....</b>	<b>2</b>
<b>Overview of Changes .....</b>	<b>3</b>
Parties to the File Fields.....	3
Be Aware of The Parties Position Order.....	3
<b>SmartTags .....</b>	<b>4</b>
Changes in the Insert Field Window .....	4
Insert Field Window in a User Document.....	5
Placeholder Tokens.....	5
Naming Conventions For Placeholder Tokens .....	5
USA Digital Solutions Library Placeholder Tokens.....	6
Prompt Text.....	6
What Triggers the Prompt Text to Display .....	7
Inserting a SmartTag into the Master.....	7
The Data Selector Dialog Box.....	8
Unused Field Options .....	9
Unanswered Questions.....	9
Examining the SmartTag Field.....	9
<b>Other Changes.....</b>	<b>10</b>
Fixed Name vs. Full Name .....	10
Secondary Escrow Officer.....	10
Buyer and Seller Notary Blocks .....	10
Mobile Homes .....	11
Effects on AutoText and AutoCorrect.....	12
<b>Working With Legal Descriptions .....</b>	<b>13</b>
Editing the Legal Description .....	13
Creating User Documents That Contain a Legal Description .....	13
Creating User Documents Without a Legal Description.....	14



# Introduction

With the release of version 7.6, Impact/SQL has introduced a new type of field for use in Master documents called SmartTags. The SmartTag field will allow the Document Administrator to create documents that will accommodate the new unlimited number of parties to enhanced residential and commercial transactions. The old DDE fields are still available and will still work so there is no need to modify any of your existing documents.

This document is intended to bridge the gap between the current *Maintaining Master Documents* manual and the completely updated version to be released shortly. It will only cover the items that are new to Impact/SQL 7.6 and/or have changed in the way you create a Master document. The *Commercial and Enhanced Residential Transactions in Impact/SQL ver 7.6* document explains the new enhancements from the end user's perspective so it will not be covered here in any detail.

# General Information and Helpful Hints

Some of the formatting conventions used in this manual are:

- Keystrokes, such as the Enter key, will be displayed as **ENTER** in the manual.
- Any text that appears on the screen will be shown as **Edit** or **Cancel**.
- Menus and menu options you are to use will be displayed as **Format > Paragraph....** This will indicate you are to choose the Paragraph... option from the Format pull-down menu.
  - ▶ The underline indicates the keystroke you can use with the **ALT** key to use the keyboard instead of the mouse. In the example above you would press **ALT-O-P**.
- Text you are to type will appear as **Type This**.
- Actions you are to take with the mouse will appear as **CLICK**.

# Overview of Changes

Impact/SQL 7.6 still uses DDE fields to bring information into the document from the database. All the fields you had available to you in the past are still there and operational. This release will not require you to redesign any of your existing Master documents.

New escrow files created in Impact/SQL 7.6 will start off with a designation of Commercial or Residential. You will most likely be designing a new set of documents to be used exclusively by the commercial side of the business as opposed to having one document to fit both needs. This does not mean you can't redesign your existing Masters to take advantage of the new fields.

Impact/SQL now has "parties to the file" when referring to Buyers, Sellers, Lenders, etc. Commercial files can have an unlimited number parties. Residential files can have an unlimited number of parties except for Lenders and Real Estate Agents being limited to three (3) apiece.

Commercial files will now handle any number of properties. The Residential files are still limited to just one.

The SmartTags are used only in Escrow Masters as of Impact/SQL v.7.6. They will be incorporated into Title over the next few releases. As for changes in Title, the only real change will be the End User being prompted to pick a legal description before creating a prelim/commitment or a policy. More on this can be found starting on page 13.

## Parties to the File Fields

In previous versions of Impact/SQL, you were limited on the number of buyers, sellers, listing agents, etc., that could be associated with an Escrow file. Each Escrow File was also limited to one property. That restriction has been lifted in Impact/SQL 7.6. The **Initial Questions** on the **Edit** menu shows the options for **Parties** and **Properties** instead of Buyer/Sellers. The DDE fields used in the previous versions of Impact/SQL are still available and still operational but there are some **very important** considerations to keep in mind.

### Be Aware of The Parties Position Order

If you create a User document that contains the DDE fields for the individual Buyers or Sellers, such as <<Buyer1>>, <<Seller1>> or <<Buyer 2 Email>>, Impact/SQL will pull in the data associated with the matching Buyer or Seller in the Parties List. In other words, if your Escrow file has 10 Buyers and 10 Sellers, the <<Buyer1>> field will pull in the name of the first Buyer shown on the Reposition screen.

Using the scenario above, let's say the User document is created in the morning, printed and saved. After lunch another employee is working with the Escrow file and discovers the list of Buyers and Sellers would be easier to work with if they were in alphabetical order. What used to be the first Buyer in the list is now the seventh Buyer in the list. Everyone else moved up one position. The next day the original document created for the first Buyer is re-opened and a correction is made. However, <<Buyer1>> is no longer the same individual. Our previous Buyer who is supposed to sign the document has been replaced even though the document was created the day before.

- ▶ This is NOT an issue if SmartTags are used.

Also, as in previous versions of Impact/SQL, the vesting is linked to the buyer where it was entered and will move with the buyer in the Position List.

# SmartTags

To handle the new features, Masters will now use SmartTags along with the DDE fields to import information from the database. SmartTags will allow you to design your documents so all the parties in a file are visible or just specific parties. The DDE fields that you are familiar with are still present and are used in the same manner as previous versions of Impact/SQL.

When you view a Master that uses SmartTags, their normal appearance is identical to the DDE fields that you have always seen. They will be inserted into the document like a DDE field and take on a bold, red appearance—depending upon your personal settings. When you RIGHT-CLICK on one of the SmartTags and choose **Toggle Field Codes** or press **ALT-F9** to toggle all fields, you will see a difference in the verbiage for a SmartTag versus a DDE field. An example of a SmartTag field is shown below:

```
{ DDE IMPACT SmartTag BuyerPayoff.LoanNumber.BUY1|Which Loan is being paid off? \* charformat \t }
```

We'll go into exactly what all that means a little later in this chapter.

## Changes in the Insert Field Window

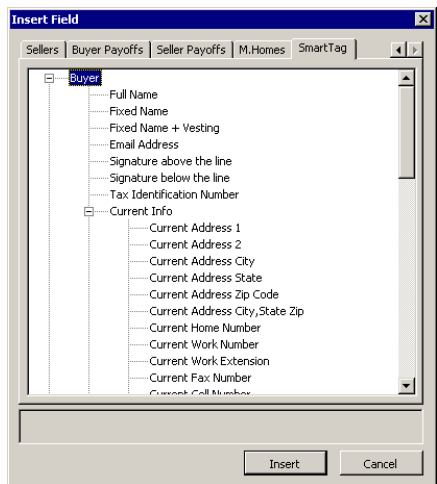


Figure 1. Escrow's Insert Field window

The Insert Field window now contains a new SmartTag tab. You will also see two navigation arrows on the far right of the tabs. These allow you to scroll back and forth between the tabs changing which ones are visible. They are shown in the red circle here. CLICK on the ◀ to scroll the tabs to the left making the ones on the far right visible. CLICK on the ▶ to scroll the tabs to the right making the ones on the far left visible.

The Escrow module's Insert Field window with the SmartTag tab visible is shown in Figure 1. The first noticeable difference is the tree structure of the available SmartTags. The fields are shown in groupings. The group names are listed with a + next to the name. This indicates the group can be expanded to show available SmartTag options.

The Buyer group is shown with a – next to it. The group has been expanded to show the available SmartTags. **Current Info** has also been expanded to show the available SmartTags it has available.

The + and – are toggles. CLICK on the + to expand the selection and CLICK on the – to collapse the selection.

Another change for both the Document Administrator *and* the End User is the Insert Field window will remain on the screen until you CLICK the **Cancel** button. This will allow you to easily insert multiple fields from any tab without having to open the dialog box again and again as in the previous versions of Impact/SQL.

- ▶ When you CLICK on the SmartTag tab the first time, it will jump up to the first item in the list. You will need to scroll down in order to reselect your field or group. This is how Microsoft Word operates when using a tree structure.

The other tabs on the Insert Field window operate as in previous versions of Impact/SQL.

## Insert Field Window in a User Document

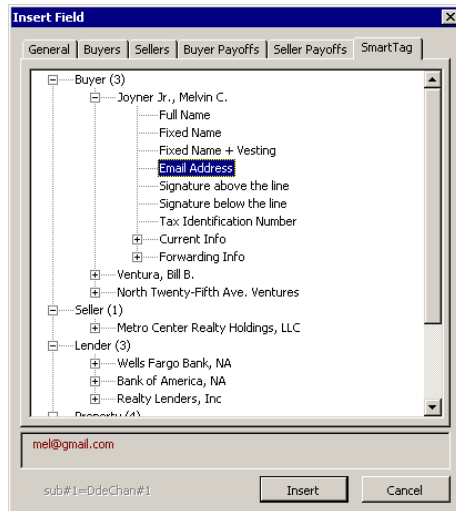


Figure 2. Insert Field window in the User Document

Figure 2 shows how the **Insert Field** window will appear in the User document. The Mobile Homes tab will only be present in the User Document if there is more than one mobile home associated with the file.

The SmartTag tab will show only the groups where there is data present. In the escrow file associated with Figure 2, you can see there are three Buyers, one Seller, and three Lenders.

The next level of the group will show actual database information. You can see the three buyers' names, the lenders' names, etc. If you expand this level, you will see the various SmartTag fields associated with the group.

If you **CLICK** once on the SmartTag, Impact/SQL will show you the value stored in the database for that field in the lower left portion of the window (same as previous versions of Impact/SQL). If you **DOUBLE-CLICK** or press **ENTER** on the SmartTag, it will be inserted into the User document at the cursor's location.

Impact/SQL will not ask for a Placeholder Token or any Prompt Text when inserting SmartTags into a User Document. The **Insert Fields** dialog box will remain open on the screen until the End User **CLICKS Cancel** or the **X**.

## Placeholder Tokens

When you insert a SmartTag into a Master, you need to identify a Placeholder Token for that field. The SmartTag, in general, refers to only one instance of the party. The Placeholder Token is how the Document Administrator tells Impact/SQL to use another instance of the party. The Placeholder Token can be any combination of letters and numbers. So, for example, if you want to use the Buyer's current work telephone number in a Master, your token could be Buyer1, BYR1, or even just 1. The 1 token would then be used throughout the document every time you want to use database information for that same Buyer.

If you need to refer to a different buyer in the same document, to distinguish between the two, you would create a new Placeholder Token. Using the same token examples as above, this additional buyer could use the token Buyer2, BYR2, or just 2 everywhere their information should be displayed in the document.

It should be noted here a numbering sequence, if any, you use with the Placeholder Token does not correlate to the Position number of the party. In other words, the Placeholder Token, Buyer1, does not refer to Buyer #1 in the Position list of Buyers. It refers to the Buyer the End User selected in the drop-down when the document was created.

## Naming Conventions For Placeholder Tokens

It is left entirely up to the Document Administrator as to how to use the Placeholder Tokens to identify different parties in a document. You can use a simple numbering sequence such as 1, 2, 3, etc. You can use whatever system works within your environment. A few caveats to keep in mind are:

- No spaces or special characters can be used in the Placeholder Token. The following characters will be removed from the Placeholder Token name if used: `~!@#%&\*()\_-+={}|\:;'"<>., and spaces

- Placeholder Tokens can be 35 characters in length but try to keep them as short as possible (around 12 or less characters).
- Placeholder Tokens are replaced in User documents with a random sequence number.
- Be consistent in all your Masters. Use the same Placeholder Token scheme in all your documents. It will make maintaining them a much simpler process.

### USA Digital Solutions Library Placeholder Tokens

The table below displays the list of Placeholder Tokens that you can expect to find in a document created by USA Digital Solutions. You may or may not follow the same convention. They are provided in case you need to work with a Master from the DSI Library.

SmartTag Grouping	Placeholder Token
Buyer	BUY1, BUY2, BUY3, etc.
Seller	SELL1, SELL2, SELL3, etc.
Lender	LEND1, LEND2, LEND3, etc.
Listing Agent	LISTA1, LISTA2, LISTA3, etc.
Selling Agent	SELLA1, SELLA2, SELLA3, etc.
Other Agent	OTHA1, OTHA2, OTHA3, etc.
Attorney	ATTY1, ATTY2, ATTY3, etc.
Accommodator	ACCM1, ACCM2, ACCM3, etc.
Other	OTHP1, OTHP2, OTHP3, etc.
Property	PROP1, PROP2, PROP3, etc.
Buyer Payoff	BYPO1, BYPO2, BYPO3, etc.
Seller Payoff	SLPO1, SLPO2, SLPO3, etc.
Mobile Homes	MH1, MH2, MH3, etc.

### Prompt Text

Another element to the SmartTag is the Prompt Text. You can ask the End User a question that will help them make the appropriate choice from the drop-down menu of parties or properties that are associated with the file. If you use the Seller Full Name SmartTag in your document, you can have Impact/SQL ask them when the document is created “Seller Used with this Deed?” The prompt can be anything that you feel will help the End User make the correct decisions.

Prompt Text should not be longer than 45 characters long otherwise it will run to the drop-down field associated with the SmartTag and be cut off.

## What Triggers the Prompt Text to Display

You do not have to provide a prompt for every SmartTag you use in a Master document. The Prompt Text will only appear when a one-to-many situation exists. If we look at the Lender group in the SmartTag tree (Figure 3), for each Lender there is only one Full Name, one Attention To, one Address1 and so forth. When using these SmartTags, you can type in a prompt for the first field in the document using that Placeholder Token for a Lender. The rest of the time you insert a SmartTag for that Lender's Placeholder Token, you can leave off the prompt. The user will not be shown it.

If you use a One-to-One type SmartTag again with a different Placeholder Token, you will need to provide a new prompt for the End User of the Master such as "Identify the Second Lender".

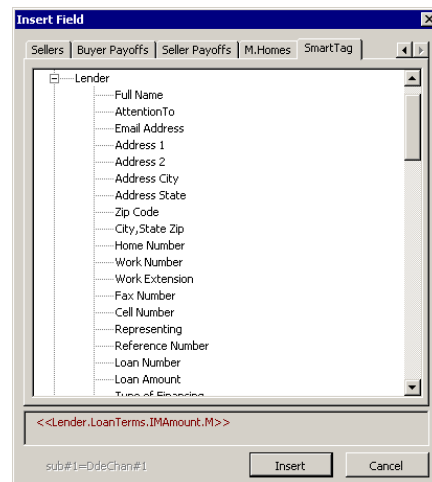


Figure 3. One to One Relationship

Figure 4 shows an example of a One-to-Many relationship regarding the SmartTags. For each buyer there could many different payoff entries. If you are creating a document where you use the Placeholder Token BUY1, you will need to provide Prompt Text to allow the End User to select which buyer to use with the document. Then when you insert the buyer's payoff information SmartTags, you will need to provide Prompt Text again because there could be numerous payoffs. The End User needs to know which one to use and the Prompt Text can help them make the correct choices.

## Inserting a SmartTag into the Master

The steps for inserting a SmartTag into your Master follow the same procedure you used to insert a DDE field in previous versions of Impact/SQL. In the Master, you position the cursor where you want to use a field and CLICK the **Field** button on the Impact/SQL toolbar. The **Insert Fields** window appears on the screen and you select the field you want and CLICK the **Insert** button.

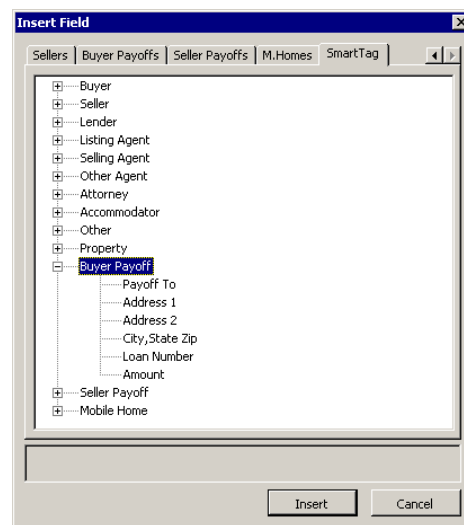


Figure 4. One to Many Relationship

A SmartTag field has an additional step before the field is inserted to the Master. You need to define a Placeholder Token and provide the End User with Prompt Text to help them identify the proper party to be used in the document. When you have a SmartTag in the Master, the End User will be presented with the **Data Selector** dialog box when they create the document. In this dialog box, they select the correct party for the document in a drop-down list. Once they identified all the parties to be used in the document and CLICK **OK**, the document is created.

1. Place the cursor at the location in the Master where a SmartTag is to be used.
2. CLICK on the **Field** button on the Impact/SQL Toolbar.
3. CLICK on the **SmartTag** tab.

► You may have to use the ► to scroll the tabs to the left in order to see the **SmartTag** tab.

4. CLICK on the SmartTag body area to activate it.
5. CLICK on the **+** next to the group you want to use.
6. CLICK on the **SmartTag** to be used.
7. CLICK on the **Insert** button.

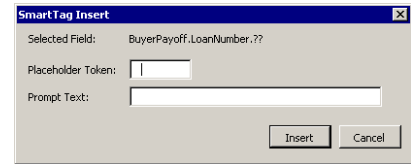


Figure 5. SmartTag Insert

▶ You can also DOUBLE-CLICK on the field and skip Step 7.

8. The **SmartTag Insert** dialog box appears on the screen (Figure 5). Type in your Placeholder Token and press **TAB**.
9. Type the Prompt Text that should be shown to the End User for this field when the document is created, if necessary.
10. CLICK the **Insert** button.

- ▶ You can CLICK the **Cancel** button to return to the **Insert Field** window without inserting this particular field.
- ▶ If you CLICK **Insert** and have not provided a Placeholder Token, the error message shown in Figure 6 will appear on the screen. CLICK **OK** and type a Placeholder Token.

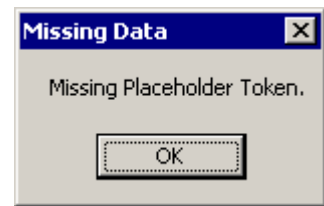


Figure 6. Missing Placeholder Token Error

## The Data Selector Dialog Box

If a document has a SmartTag field, Impact/SQL will display the **Data Selector** dialog box, shown in Figure 7, when the document is first opened. This will happen in both the Master and the User versions of the document. The dialog box will display each SmartTag's Prompt Text along with a drop-down field displaying the current values for the Escrow file. If you are viewing a Master, the drop-down menus will be blank because there is no Escrow file associated with the document.

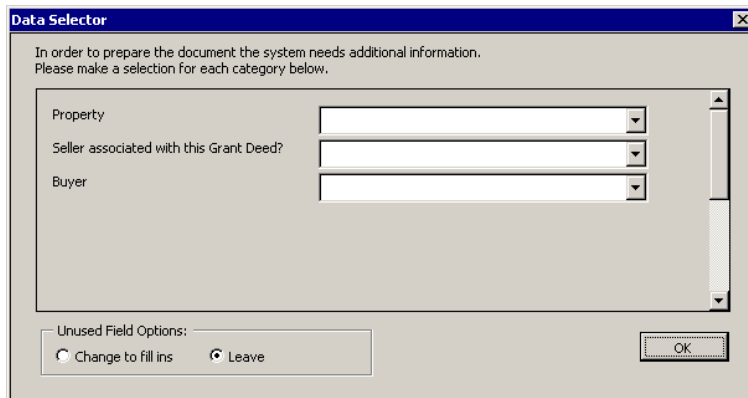


Figure 7. The Data Selector Dialog Box

When the User document is created and the Data Selector has been filled out, the End User will CLICK the **OK** button to proceed with the document creation. At this point, Impact/SQL will populate all the SmartTags with matching database information for the parties and/or properties selected.

Impact/SQL will replace all Placeholder Tokens with a random numbering sequence. All identical Placeholder Tokens will have the same sequence number in this document. This numbering sequence is not an identifier

to the party chosen in the Data Selector. The next time you create the document, an entirely different number will be used. The sequence is only used within the same document.

Figure 7 also shows an example of what occurs when you do not provide Prompt Text for a SmartTag. In this example, a Property and Buyer SmartTag was used in the document without providing Prompt Text.

## Unused Field Options

This area of the Data Selector is for the End User to tell Impact/SQL how to treat the SmartTags when an option is not selected from one of the drop-down fields.

The **Change to fill ins** radio button will remove the SmartTag field from the document and replace it with a Fill-In ([ ]). If the **Leave** radio button is selected (the default), the SmartTag will remain in the document so the information can be provided later.

- ▶ The  is disabled on this dialog box. Click the **OK** button to close the window.

## Unanswered Questions

If the End User does not answer all the Prompt Text before clicking the **OK** button and has the Unused Field Options set to **Leave**, you can have the Data Selector shown on the screen again at a later time by pressing **CTRL-SHIFT-R**. Only the Prompt Text that has not been answered will be shown in the Data Selector.

## Examining the SmartTag Field

The SmartTag will take on the same appearance in the Master that you have seen with the DDE fields. The display text is shown within double angle brackets such as <<BuyerPayoff.LoanNumber>>. You can RIGHT-CLICK on the SmartTag and choose **Toggle Field Codes** to display the detailed SmartTag information. Below is that detail for the <<BuyerPayoff.LoanNumber>>:

```
{ DDE IMPACT SmartTag BuyerPayoff.LoanNumber.BUY1|Which Loan is being paid off? \* charformat \t }
```

**BuyerPayoff.LoanNumber** is the name of the SmartTag being examined. **BUY1** is the Placeholder Token used in this particular instance. It is referring back to the BUY1 Placeholder Token used to identify the name of the buyer. This way Impact/SQL can bring in the correct payoff data if there is more than one buyer associated with the file.

The | separates the field name information from the Prompt Text. **Which Loan is being paid off?** Is the Prompt Text for this SmartTag. This is what will be displayed when the User document is first created.

You can toggle the SmartTag field as shown above and edit the Placeholder Token and/or the Prompt Text.

If you toggle the SmartTag in a User document and the Prompt Text has been answered in the Data Selector, you will see the random sequence number that has replaced your Placeholder Token. Using the example shown above, in the User document all BUY1 Placeholder Tokens will be replaced by the same sequence number in this document.

```
{ DDE IMPACT SmartTag BuyerPayoff.LoanNumber.07F3CCD4-4C7C-43E1-B1A6-005CEEDB2CB8|Which Loan is being paid off? \* charformat \t }
```

If this number is changed, the text from the database will disappear. The SmartTag will still be in the document, but since Impact/SQL doesn't recognize it, no data can be displayed. You can repair this SmartTag by closing and reopening the document or just press **CTRL-SHIFT-R**. Impact/SQL will display the Data Selector dialog box again and the Prompt Text can be answered once again.

# Other Changes

There are a few more changes in Impact/SQL 7.6 that need to be mentioned briefly. Each one of these topics will be covered in this area.

## Fixed Name vs. Full Name

On the SmartTag tab in the Insert Field window, you will see three different options for displaying the parties name in a document. They are a) Full Name, b) Fixed Name, and c) Fixed Name + Vesting. The Fixed Name options will display the party's name as First Middle Last. Full Name will be displayed as Last, First Middle. The table below show how this will appear for Melvin C. Joyner, Jr.

SmartTag	User Document View
Full Name	Joyner, Jr., Melvin C.
Fixed Name	Melvin C. Joyner, Jr.
Fixed Name + Vesting	Melvin C. Joyner, Jr., an unmarried man

## Secondary Escrow Officer

There are new DDE fields under the General Tab for displaying the Secondary Escrow Officer's information in documents. These are new to Impact/SQL v.7.6 so your Masters will have to be edited to take advantage of these fields.

- ▶ The option to use Secondary Escrow Officers must be turned on in the Utilities Module in order for the Impact/SQL user to enter this information for an Escrow File.

The new fields available to Masters are shown below

Document Text	Field Name	User Document View
Secondary Escrow Officer Name	ESCDDE(465)	Kate Longfellow
Secondary Escrow Officer Phone	ESCDDE(466)	(602) 234-3596
Secondary Escrow Officer Fax	ESCDDE(467)	(602) 234-9320
Secondary Escrow Officer Email	ESCDDE(468)	klongfellow@MyEscrow.com
Secondary Escrow Officer Initials	ESCDDE(469)	KL

## Buyer and Seller Notary Blocks

On the Parties window for both Residential and Commercial files, you have the option to provide the text that should be used for the notary block for the Buyers and the Sellers. There is one all the Buyers will use and one all the Sellers will use. Each Buyer or Seller does not have their own block.

The End User will have the opportunity to type this information when the parties are entered into the file or by editing either the Buyer parties or Sellers parties at any point in time. The notary block text can then be brought into the document wherever the Document Administrator has placed one of the two new DDE fields which contain this information.

Because the Notary Block text will be displayed on the User document via a field, the information can not be edited directly on the document. The End User will have to return to the Parties window to make any modifications. If the End User does make any changes to the Notary Block text while in the document, it will remain until they save and close the document. When the document is opened again, the changes will be gone.

There are two new DDE fields available to your documents. The <<Buyer Notary Block>> DDE field can be found on the **Buyers** tab and the <<Seller Notary Block>> can be found on the **Sellers** tab on the Insert Field window.

Document Text	Field Name
Buyer Notary Block	ESCDDE(462)
Seller Notary Block	ESCDDE(463)

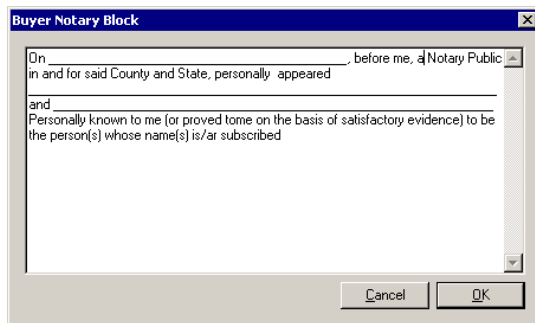



Figure 8. Notary Block Window

In the Buyer and/or Seller group on the Parties window, the End User clicks the Notary Block icon  to open the Notary Block window. The Buyer Notary Block is shown here in Figure 8 but the Seller Notary Block window behaves in the same manner.

Underscores can be used to represent blank lines if need be. No DDE or SmartTags fields can be used within this Notary Block.

If the text is entered with a hard return at the end of each line, it will maintain the look entered here. If the text is allowed to wrap at the end of each line, then the Notary Block text will take on the margins of the Master document. To contain the width in those cases, you can place the DDE field inside a table cell.

If the Master documents contain Notary Blocks already, this will not override them. This information will not be used unless the <<Buyer Notary Block>> and/or <<Seller Notary Block>> fields are in the document.

## Mobile Homes

The mobile home DDE fields were introduced in Impact/SQL 7.5 for Escrow documents. They used comments to bring information from the database to the document. Several issues were identified with these DDE fields and have been corrected. However, in Impact/SQL v.7.6, mobile home fields are now also SmartTags.

All your existing Master documents that have Mobile Home fields will still function. USA Digital Solutions, Inc. recommends you replace them, however, with the new SmartTags. These new fields are more reliable and represent the way all fields will be in Impact/SQL in the future.

Figure 9 shows the Insert Field window in a User document with the Mobile Home SmartTags displayed. Because this is a User document, the address of the mobile home is displayed. There are fields for up to four units for each address.

The SmartTags for mobile home are inserted to the Master the same as any other SmartTag. You will need to have a Placeholder Token for each instance of the mobile home group to be used in the document. You'll also have to provide your End User with a prompt to help them identify which mobile home to use with the document on the first field you insert in the document.

## Effects on AutoText and AutoCorrect

If you as the Document Administrator use AutoText to save frequently used blocks of text and/or fields as AutoText, you can continue to do so with SmartTags. You can store SmartTags with the most common Placeholder Token and Prompt Text already prepared. The User documents will not have a seamless way to accomplish the same thing however.

If they insert a SmartTag into a document with a Placeholder Token, no data will be displayed because Impact/SQL has not had the opportunity to exchange the Placeholder Token for the randomly generated sequence number found in User documents. The End User will have to add the step of pressing **CTRL-SHIFT-R** to their routine in order to see the database information.

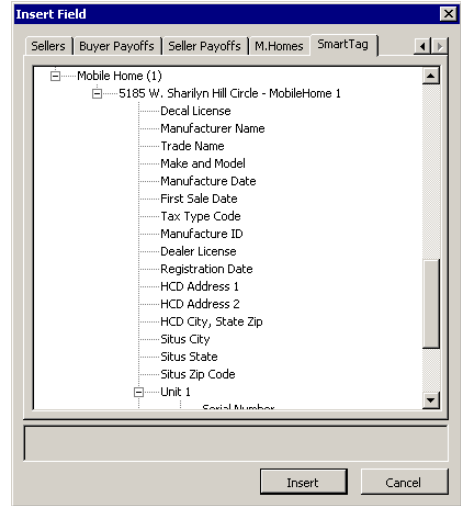


Figure 9. Mobile Home SmartTags

# Working With Legal Descriptions

Inserting a legal description into your Masters has not changed in Impact/SQL 7.6 for the Document Administrator. You still specify where you want the legal description to be printed using Microsoft Word's INCLUDETEXT field. This field can be contained within a table cell or just part of the body of the document.

The differences for legal descriptions will all be apparent on the User documents. Since you could have numerous properties associated with a Commercial file, there could be numerous legal descriptions. Residential files will continue to have only one legal description.

It is important the Document Administrator is aware of how the End User will see the documents as opposed to how they view them. There can only be one legal description that appears in a User document. The Document Administrator should keep this in mind when creating Masters so they can provide the End User with clear and concise prompts when necessary to help them pick the correct options.

## Editing the Legal Description

The End User will use the same steps to create a legal description for a multiple property file as they do for a single property file. If the file has only one property, the End User will not see any differences from previous versions of Impact/SQL. If the file has multiple properties, the End User will see the Property Selector dialog box (Figure 10) on the screen after choosing **Edit > Legal Descriptions** from the Impact/SQL desktop.

Below are the steps the End User will perform to edit a legal description when there are multiple properties in the file.

1. Choose **Edit > Legal Descriptions**.
2. CLICK on the property address for which you need to create a legal description.
3. CLICK the **OK** button.
  - ▶ CLICK the **Cancel** button to return to the Impact/SQL Desktop.

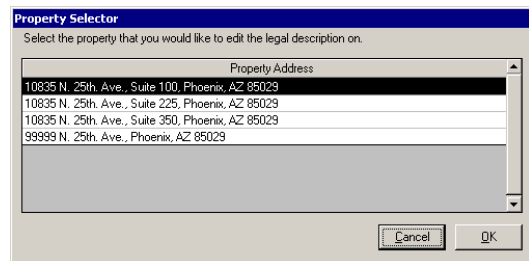


Figure 10. Property Selector Dialog Box

4. Type the legal description and CLICK the  icon when completed.

## Creating User Documents That Contain a Legal Description

When the End User picks a document from the Document Menu and it contains the INCLUDETEXT field for the legal description, Impact/SQL will behave in one of two ways depending upon the number of properties associated with the file. If there is only one property, the End User will not see anything different than what occurred in previous versions of Impact/SQL. If the file has multiple properties, the End User will see the **Select Legal Description** dialog box.

When the User document is created, Impact/SQL will display the **Select Legal Description** dialog box on the screen. The End User highlights the property to

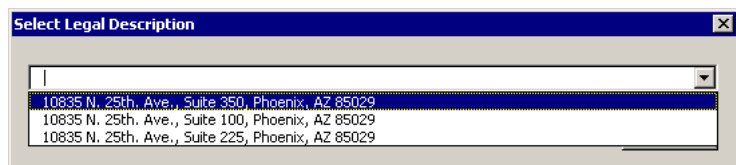


Figure 11. Select Legal Description Dialog Box

be associated with the document and then CLICKS the **OK** button.

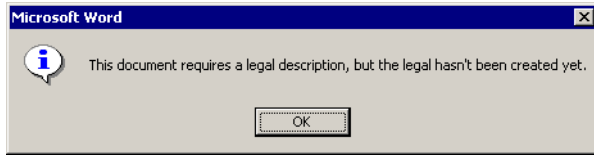


Figure 12. Missing Legal Description Warning

All the DDE fields in the document will display information associated with this property address.

If the End User CLICKS on the **Cancel** button instead of choosing a property and the Master contains a legal description, they will see the warning message shown in Figure 12.

## Creating User Documents Without a Legal Description

The Select Legal Description dialog box will only appear on the screen when the User document is created and the Master document contains the INCLUDETEXT field to bring in the legal description. If this element is missing from the Master document and any property fields are used, Impact/SQL will use the information associated with the first property if multiple properties are present in the Escrow file.

If there is only one property present in the Escrow file and the Master doesn't contain a legal description but uses the other property fields, the End User will not see any difference in how the document is created from the way it was created in previous version of Impact/SQL.