



# Impact / SQL

Version 5.12.0

## Reconveyance Tracking Manual

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## **Introduction to Impact/SQL Reconveyance Tracking**

This manual explains all of the functionality contained within the Impact/SQL Reconveyance Tracking module, and discusses how each tool might be used. As each company functions in its own unique way, there are some functions that may not be utilized, but you are encouraged to examine and consider all of them, to ensure you are getting the most out of Impact.

The Reconveyance Tracking module is utilized by the Title Department to prepare the Notice of Intent and Release of Obligations on closed files. Data entered by Escrow is utilized by the Reconveyance Tracking module, so there is no redundant data entry. Tickler reminders on when to send the Notice of Intent and Release of Obligations are used in the Reconveyance Tracking module.

There are a number of configuration options that can affect the functionality of the system. These variations are discussed in this manual, to the extent that the discussion does not detract from the explanation of the functions of the complete package.

## General Information and Helpful Hints

This manual progresses through the functions in Impact Reconveyance Tracking in the order that they appear on the menus within the module. This will not be how you work with the product, as that will depend on your responsibilities and the structure of each individual business, as well as the configuration of Impact at each business. Before discussing the system functionality in detail, there are some general features that you should be aware of. These are discussed below.

Some formatting conventions used in this manual are:

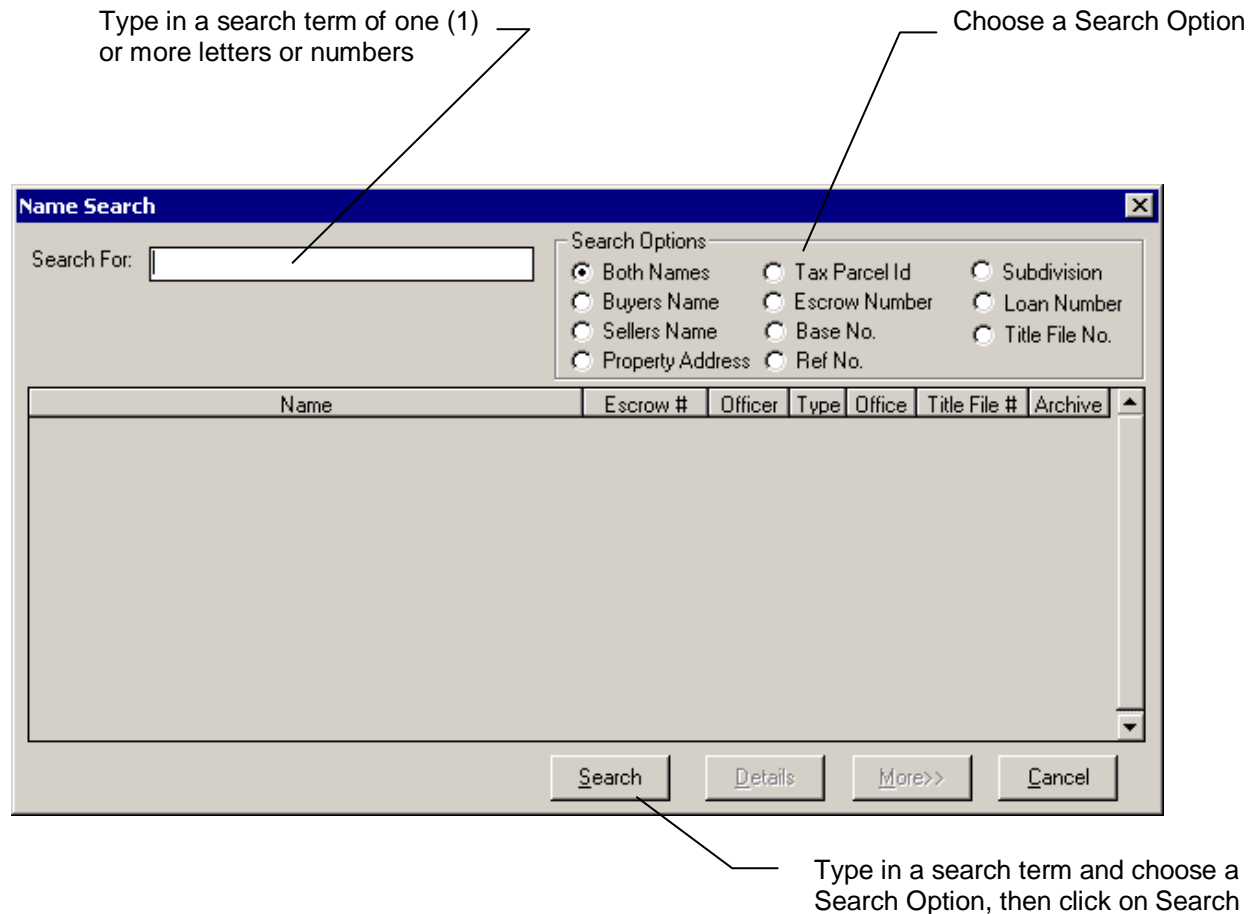
When you need to press the Enter key, you will see **ENTER** in this manual.

When you see text displayed on a menu or window such as the words "Edit" or "Cancel", you will see **Edit** or **Cancel** in this manual.

**Reports > Open List** means that you select **Reports** from the main menu and then select **Open List** from the next menu.

## Name Search

The **Name Search** function, seen in many places in Impact, permits you to search the entire Impact database by many variables (names, property address, tax parcel ID, escrow number, base number, reference number, subdivision, loan number or title file no.). The index behind the search function, links the names in the database to their respective escrow/direct number(s), which permits you to see the related escrow/title officer, branch number and (if utilized) title file number.



First, before entering a name, select one of the **Search Options**. The default **Search Option** is to search **Both Names**.

Second, to use the **Name Search** function, type in one (1) or more letters or numbers into the **Search For** text entry field. You can use the percent symbol (%) as a wildcard, to represent any character.

Click on the **Search** button, and if anything is found that matches your search criteria, the results will be displayed.

To use one of the displayed results, double-click on it. Alternately, to change or refine the search, just type in a new search term into the **Search For** text entry field and/or change the **Search Options**. If you want to view some additional information concerning one of the escrow numbers listed, highlight the escrow number, and then click on **Details**.

The Search For term is "A"

The Search Option selected is Both Names

Highlight a name, and then double-click to select it

To scroll up or down, click on the scroll arrows

**Name Search**

Search For:

Search Options

- Both Names
- Buyers Name
- Sellers Name
- Property Address
- Tax Parcel Id
- Escrow Number
- Base No.
- Ref No.
- Subdivision
- Loan Number
- Title File No.

Name	Escrow #	Officer	Type	Office	Title File #	Archive
ACKERMAN, JOAN	00001027	HW	B	002	00001027	
ACKERMAN, LARRY	00001027	HW	B	002	00001027	
ACME, INC.	TEST04	E1	S	998	TEST04	
ADAMS, BOB	TESTCIT1	E1	B	998	TESTCIT1	
ADAMS, BOB	TESTCIT7	E2	B	002	TESTCIT7	
ADAMS, SAMUEL	T1	E2	S	500	T1	
ADAMS, SAMUEL	T11	HW	S	001	T11	
ADAMS, SAMUEL	T12	E2	S	002	T12	
ADAMS, SAMUEL	T2	HW	S	001	T2	
ADAMS, SAMUEL	T3	E1	S	998	T3	
ADAMS, SAMUEL	T4	HW	S	001	T4	

Double Click On Name to Display Status Information

Buttons: Search, Details, More>>, Cancel

To see additional names if they are available, scroll down through the list of names by clicking on the scroll arrow. Also, if the **More>>** button is activated (not dimmed out), you can click on **More>>** to see even more names than are shown in the first set presented.

**NOTE:** If the archive column (far right) has a value in it, the file will **NOT** be available for viewing through Title, as it has been archived.

The **Type** column defines the **Name** on the search line. The **Type** formats are:

- B** - Buyer
- S** - Seller
- P** - Property Address
- T** - Tax Parcel
- O** - Base Order
- R** – Ref number 1 and Ref number 2
- N** – Subdivision Name

## Name and Address File (Naf)

The Name and Address File (**Naf**) or customer list is a very important tool in Impact. Whenever the **Naf** is available in the upper left corner of the screen, you may find that it is a very convenient and efficient way to fill out the name and address fields. Try to use it because it speeds up data entry, and provides for better sorting of management reports. Depending on the company's configuration, you may have one centralized **Naf** or you may have a different **Naf** for each escrow and title branch.

Any time the **Naf** is visible in the upper left corner of the screen you can place the cursor within the name field to cause the **Naf** to be activated (not dimmed out). Click on the activated **Naf** and then **Edit**, or alternately, just use the **CTRL-N** Quick Keys to open the **Name and Address File** screen. In the **Name** field, type in a search term of at least one character and Impact will automatically display the results. You may also use the percent symbol (%) to represent any character. Once a **Naf** entry is highlighted, click on **Use** so that all the completed fields for the **Naf** entry will populate the fields in the file being worked on. See **Naf** section for instructions on adding or modifying **Naf** entries.

The Name search term is "century".  
You may also use the percent symbol (%) to represent any character.

The screenshot shows the 'Name and Address File' window. The 'Search Options' section includes radio buttons for 'All', 'Title Companies', 'Payoff Lenders', 'Real Estate Brokers', 'Attorneys', 'Lenders', 'Miscellaneous', 'Mortgage Brokers', and 'Other'. The 'Search for name starting with' field contains 'century'. The 'Search by ID' field is empty. The 'Search by county' and 'Search by state' fields are also empty. The 'Expand' checkbox is unchecked. The results list shows two main entries: 'Century 21 Real Estate' and 'Century of Homes'. The 'Century 21 Real Estate' entry is expanded, showing a list of agents: John Listing, Sharon Selling, Tricia Ramsey, and Mike Talyor. The 'Address' column shows '324 Long River Road' for the first two agents and '945 E. Courtland Drive.' for Tricia Ramsey. The 'Century of Homes' entry shows '35 Parade Avenue'. The right side of the window contains a form with fields for ID No. (1013), Name (Century 21 Real Estate), Contact Name, Address 1 (324 Long River Road), Address 2, City (Laguna Beach), State (CA - CALIFORNIA), Zip (98989), County, Phone ((214) 958-5246), Fax, Email Address, Comments, Bank Name, Account No., and Routing No. The bottom of the window has buttons for Use, New, Delete, Modify, Cancel, and USES.

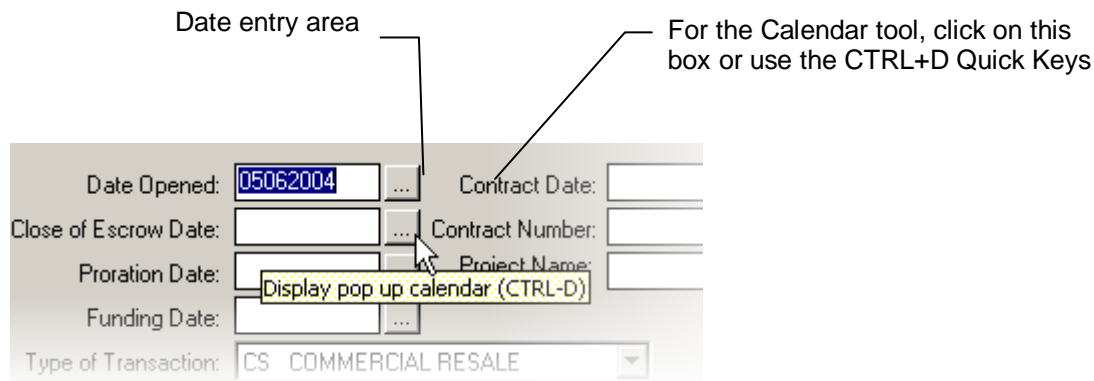
Click on the **Use** button to paste **Naf** entry into the name and address fields.

## Helpful Hints for Entering Information

### Dates:

Do not enter hyphens or slashes when entering dates into Impact.

Enter dates as 2 digit month, 2 digit day, and 2 digit year, for example, "122504" for December 25, 2004. If entering a different century other than the current century, you must enter a 4 digit year. You can also click on the box with "... " just to the right of the date entry area, or use the **CTRL+D** Quick Keys, to pull up the **Calendar** tool.



### Dollars:

Do not put commas or dollar signs in the dollar amounts.

### Naf:

Any time you see **Naf** in the upper left corner of a screen, try to use it (see the discussion of the Name and Address File (**Naf**)).

### F4:

You may use the function key **F4** to access a drop down list box, or you may click with the mouse on the down arrow.

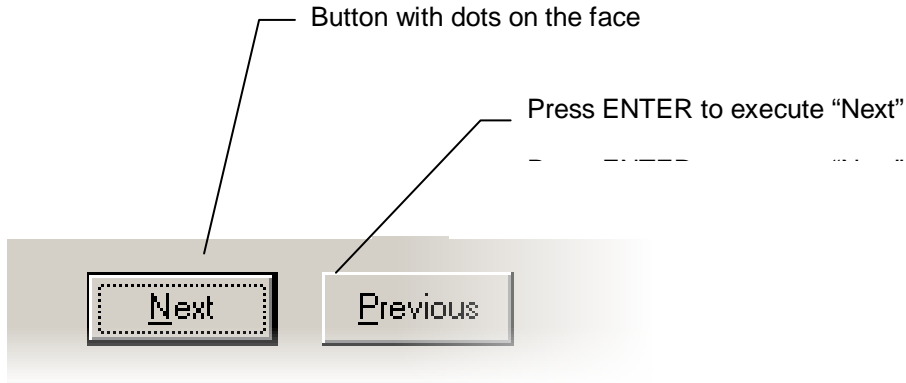
### TAB:

Use **TAB** to move forward from one entry field to the next entry field.

Use **SHIFT+TAB** to move backward from one entry field to the previous entry field.

### Execute:

When you see a button with dots on the face, you can press **ENTER** to execute that command, rather than clicking on it with the mouse, as the button already has "the focus". Press **TAB** to move the focus to the other button(s).



### Quick Keys

Quick Keys can help you quickly accomplish tasks by using keyboard entries instead of using the mouse to click on selections. Quick Keys are one or more keys you press on the keyboard to complete a task.

For example, press and hold the Alt key and also the F key. This **ALT+F** key combination opens the **File** menu, just as clicking on the **File** menu at the top left of the Impact Title screen opens the **File** menu.

Anytime you see a menu selection item on the screen that has a letter in the word underlined, you can use the Quick Keys alternative to using the mouse, for example, use the **ALT+ V** Quick Keys to drop down the **View** menu because the "**V**" in **View** is underlined.

## Logon

Access to the Impact Reconveyance Tracking module (as to all Impact modules), is controlled by a user-rights table, administered by a limited set of user ID's that have sufficient authority granted to them. This is a very important control, and should be carefully managed. Depending on the nature of the rights assigned to a user, they will have access to various pieces of the overall Impact suite, but generally not complete access. This functionality helps reinforce audit controls, and needs to be considered in conjunction with the network security plan.

The system can be configured to require a logon routine, each time the user opens Impact Reconveyance Tracking, or it can be configured to provide for an automatic logon utilizing the NT user name. By providing for an automatic logon utilizing the NT user name, control over the access to the application is very flexible: both the system administrator and the rights table within Impact can control access. The system administrator can control access by disabling the user's NT user name, a likely event in the case of an employee's departure. In addition, the user name can be disabled within Impact Utilities – which will only affect the user's ability to access Impact modules. This would be done if the user is still using the rest of the network, but should no longer be accessing Impact.

There is not an automatic expiration of passwords setting within Impact, so to ensure strong controls the administrator would have to routinely change all users' passwords, and inform the users of them, if the automatic logon based on NT user names is disabled. For this reason, the use of an automatic logon based on NT user names can be a more effective control – assuming automatic expiration of passwords is implemented through the NT operating system. This matter is more fully explained in the Impact Utilities manual.

If the system is configured to require a user to logon to Impact Reconveyance Tracking, a screen like that shown below will be presented, after the user double-clicks on the Impact Recon Tracking icon on their desktop.

The screenshot shows a dialog box titled "Log On to Impact/SQL Recon Tracking". The dialog box has a blue header bar with the title and a close button. Below the header, the text "IMPACT SQL" is displayed in a large, stylized font. To the right of the logo, it says "USA Digital Solutions, Inc. Copyright © 1992-2007". Below the logo, it says "Version 5.12.0 Build (042)". To the right of the version information, it says "DSI-PHX-DEMO" and "dsi-access". Below this information, there are three input fields: "User Initials:" (a text box), "Password:" (a text box), and "Log on to:" (a dropdown menu showing "Demo"). At the bottom of the dialog box, there are two buttons: "Cancel" and "OK".

Drop down list  
arrow

When configured to require a logon step, the user will be identified within the system by their initials (3 maximum), and will be given a password.

Enter your user initials in the first field, and then **TAB** to the **Password** field. Enter your password and, if the correct database is identified in the **Log on to** field, click **OK**. If the database is not correct, then **TAB** to the **Log on to** field and select the correct database by clicking on the drop down list arrow and highlighting a database name; then click **OK**. Most users will only have one database available.

Alternatively, if you do not want to use the mouse to click **OK**, you can hit the **TAB** key until **OK** is highlighted, and hit **ENTER**.

**NOTE:** When you enter your password, it will not display on the screen, but will be represented by a series of asterisks “\*\*”.

If you don't want to continue, click on **Cancel** instead. This will cause the Logon dialogue box to close and the Impact Title module will not be opened.

**KEEP YOUR PASSWORD PRIVATE.** You should not share your password or log on to the system and then let someone else operate under that session. The initials of the user logged on to the system will attach to transactions entered, and you will only want to be responsible for your own activity.

If you forget your password, the administrator of the Impact application must assign a new one.

## The Impact/SQL Reconveyance Tracking Desktop

Impact will display a desktop as shown below when you sign into the Reconveyance Tracking module. All menus are accessible without first selecting an escrow or file number. If a file is opened within the Escrow or Title module, you may still access the file in Reconveyance Tracking. The Reconveyance Tracking module does not lock files, so escrow or title may be in the file at the same time.

Multiple users may enter items into Reconveyance Tracking at the same time. USA Digital Solutions does not recommend multiple users printing the Notice of Intend or Release of Obligation, as this can cause some confusion with multiple Notices sent out or recording of the Release multiple times.

Impact Title desktop may show your company logo



## File Menu

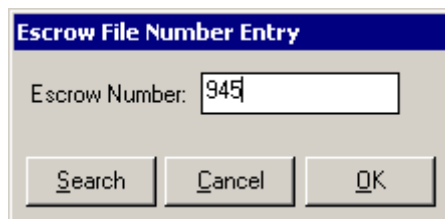
The purpose of the Reconveyance Tracking system is to aid in tracking payoffs so that the company's Title Department can confirm that reconveyances have been done and to facilitate the recording of a release if one has not been done in the required timeframe.

The **File Menu** will present the following items:

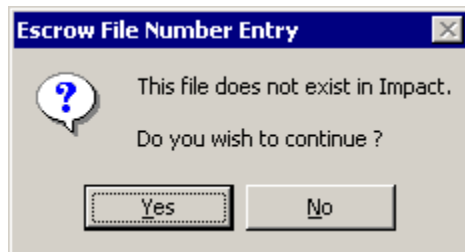
- **New**
- **Open**
- **Search**
- **Exit**

### New

Select **New** will let you open a pre-existing escrow file established through the Escrow module and will be new to the **Reconveyance Tracking** database. If the **Escrow Number** has already been added to the tracking system, select **Open** from the **File** menu. Selecting **New** will open the **Escrow File Number Entry** screen. Enter your **Escrow Number** or click on **Search** to locate your **Escrow Number**. See **Name Search** on how to find your file number.



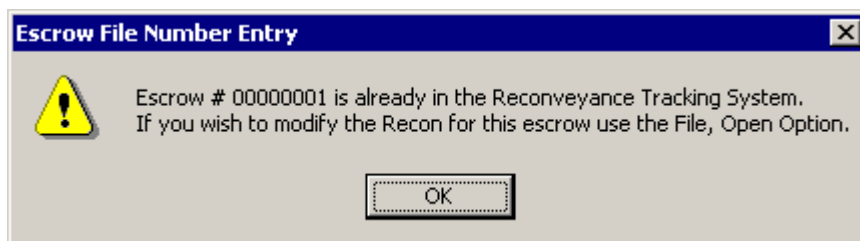
If your **Escrow Number** is not a valid number you will receive the prompt displaying the option of entering a different number, like a Direct Order number. Click on **Yes** to create a new payoff.



Entering a manual number will give you the **Items for Reconveyance Tracking** screen where you will have to manually **Add** the payoff information.

Items for Reconveyance Tracking				
Escrow Number:	00000945	Close of Escrow:	<input type="text"/>	...
Branch Number:	999	Recording County:	<input type="text"/>	
Escrow Officer:		Date Entered:	08/20/2007	
Payee	Address	Location	Loan #	Amount
<input type="button" value="Add"/>		<input type="button" value="Modify"/>		<input type="button" value="Delete"/>
<input type="button" value="Cancel"/>				

If your Escrow number or manual number is already in the **Reconveyance Tracking System** you will receive the prompt to select **Open** from the **File** menu.



If you enter a valid Escrow Number, you will receive the **Add Items for Reconveyance Tracking** screen (seen on the next page) and all the Buyer/Borrower and Seller payoffs entered into the Escrow file under the Payoff sections of the HUD or Worksheet Style of entry, will be listed. Click on the **All** tab to load all the payoffs into Reconveyance Tracking, or highlight the individual payoffs needed and click on the **OK** tab.

**NOTE:** Only payoffs entered into the HUD or Worksheet under the designated payoff screens will appear. This may include credit cards. Highlight the payoffs needed.

**Add Items for Reconveyance Tracking** [X]

Escrow Number: 06000188

The following payoffs have been located in the escrow file you selected. Highlight the payoffs to be added to the Reconveyance Tracking System.

Payee	Address	Location	Loan #	Amount
Discover Card	P.O. B ox 123	Dallas, TX	951478	335.00
Exon Gas	Gas way	Phoenix, AZ 85711		572.00
Bank Of America	P.O. 234	Tucson, AZ 85451	9541	65,411.37

All [OK] [Cancel]

### Items for Reconveyance Tracking

Once the selected payoffs are highlighted and the **OK** button selected, the **Items for Reconveyance Tracking** screen will appear. Those payoffs not highlighted will be automatically deleted from **Reconveyance Tracking**.

The following fields may be populated:

- **Escrow Number** – the **Reconveyance Tracking** file number
- **Branch Number** – the branch the **Escrow Number** was assigned too
- **Escrow Officer** – the assigned Escrow Officer of the **Escrow Number**
- **Close of Escrow** – the actual closed date of the escrow file. This is the date the revenue / transfer slip was printed in escrow. If a **Close of Escrow** date was not previously entered from the Escrow module, the system allows one to be entered here. Entering a **Close of Escrow** date in **Reconveyance Tracking** does **NOT** update the close date in Escrow. Enter the date in mmddyy format or click on the box with “...” just to the right of the date entry area, or use the **CTRL + D** Quick Keys to pull up the **Calendar** tool.
- **Recording County** – the county the property is located in. If a **Recording County** was not previously entered from the Escrow module, the system allows one to be entered here.
- **Date Entered** – The date the file was added to the **Reconveyance Tracking** system.
- **Payee** - The name of the payoff lender
- **Address** – The address of the payoff lender
- **Location** - The city, state, and zip for the payoff lender
- **Loan #** - The loan number for the payoff
- **Amount** – The payoff amount disbursed from the escrow file.

**NOTE:** Fields entered into **Reconveyance Tracking** do NOT update the fields in the escrow file.

Payee	Address	Location	Loan #	Amount
Bank Of America	P.O. 234	Tucson, AZ 85451	9541	65,411.37

You may **Add** additional payoffs to the **Items for Reconveyance Tracking**, **Modify** the existing payoffs selected from the **Add Items for Reconveyance Tracking** screen, **Delete** the payoffs, or **Cancel** to exit the screen.

To modify an existing payoff, highlight the payoff **Payee** and click on the **Modify** button and the **Reconveyance Update** screen will appear.

Escrow Number: 06000188		Notice Sent: <input type="text"/>	
COE Date: 02/27/2007		Release of Obligation Sent: <input type="text"/>	
Beneficiary		Owner	
Beneficiary Name: Brandon Unger and Amy Unger		Name: Bank Of America	
Address 1: P.O. 234		Address 2: <input type="text"/>	
City, State and Zip: Tucson, AZ 85451		Loan #: 9541	
Date: 08/24/2007		Amount: 65,411.37	
Type of Instrument: Other		Check #: 000159	
Original Recording Information:			
Document #: <input type="text"/>		Date Recorded: <input type="text"/>	
Docket #: <input type="text"/>		Book: <input type="text"/> Page: <input type="text"/>	
Reconveyance Recording Information:			
Document #: <input type="text"/>		Date Recorded: <input type="text"/>	
Docket #: <input type="text"/>		Book: <input type="text"/> Page: <input type="text"/>	

## Reconveyance Update

Some fields will be populated with information from the escrow file. The **Reconveyance Update** screen allows entry for the following fields:

- **Escrow Number** – the **Reconveyance Tracking** file number
- **COE Date** – The close of escrow date is the date the revenue check / transfer slip was printed. Enter the date in mmddyy format or click on the box with “...” just to the right of the date entry area, or use the **CTRL + D** Quick Keys to pull up the **Calendar** tool.
- **Notice Sent** – The date the Notice of Intent was set.
- **Release of Obligation** – The date the release was set.
- **Beneficiary, Trustor, Trustee, Other #1, Other #2, Owner, Legal, and Comments**

## Original Recording Information

The **Original Recording Information** is from the original Deed of Trust, Mortgage, or instrument that is being released. The following fields may appear on the Notice of Intent sent to the parties involved. The fields available for the Original Recording Information are:

- **Document #** - The Document # is required for the file to appear on the Notice of Intent ticklers.
- **Date Recorded** – The original date the Deed of Trust, Mortgage or other release document was recorded. Enter the date in mmddyy format or click on the box with “...” just to the right of the date entry area, or use the **CTRL + D** Quick Keys to pull up the **Calendar** tool.
- **Docket #** - The original **Docket** book assigned by the county recorder’s office.
- **Book** – The original **Book** number assigned by the county recorder’s office.
- **Page** – The original **Page** number assigned by the county recorder’s office.

## Reconveyance Recording Information

The data for the **Reconveyance Recording Information** is entered at least thirty (30) days after the Notice of Intent letter has been sent and the Release has been recorded. The fields available are:

- **Document #**
- **Date Recorded**
- **Docket #**
- **Book**
- **Page**

## Parties Involved

The tab folders represent the parties involved, the brief legal description of the property and any comments you will like to add to the file. You may access the parties by clicking on their tab folder or use the Alt + the letter underlined from your keyboard. The Alt + L will display the **Legal** screen. The tab folders are:

- **Beneficiary**
- **Trustor**

- **T**rustee
- **O**ther #1
- **O**ther #2
- **O**wner
- **L**egal
- **C**omments

### **B**eneficiary

The **Beneficiary** screen may be populated with information from the escrow file. The following fields are available for the **Beneficiary** information.

- **Beneficiary Name** – The seller number one and seller number two names from the escrow file.
- **Name** – The payoff lender name from the escrow file is loaded, else you may use the Name and Address File, the **NAF**, to populate the payoff lender fields..
- **Address 1** – The payoff lender address line one from the escrow file
- **Address 2** – The payoff lender address line two from the escrow file.
- **City, State, and Zip** – The payoff lender location from the escrow file.
- **Loan #** - The payoff lender loan number from the escrow file.
- **Type of Instrument** – The **Type of Instrument** is not available if the system configuration **Select State** is set for Nevada under the **Tools** menu. If you have the field **Type of Instrument**, select the type of document you will be releasing, **Other, Deed of Trust, or Mortgage**. If no **Type of Instrument** is selected, a **Notice of Intent** will not be generated.
- **Date** – The date the payoff check was issued.
- **Amount** – The amount of the payoff check.
- **Check #** - The check number issued for the payoff.

### **T**rustor, **T**rustee, **O**ther #1, **O**ther #2

The **Trustor, Trustee, Other #1**, and **Other #2** allow for the name and address of the involved parties. You may use the **NAF** to populate the fields. The **Trustor** name must be entered.

**NOTE:** When there is an entry in the **Name** field below any of the tabs a red diamond will appear to the left of the title on the tab.

### Owner

The **Owner** screen will load the buyer number one name from the escrow file. You may edit the **Owner** name.

**Reconveyance Update**

Escrow Number: 06000188      Notice Sent:  ...

COE Date: 02/27/2007 ...      Release of Obligation Sent:  ...

Beneficiary  
 Trustor  
 Trustee  
 Other #1  
 Other #2  
 **Owner**  
 Legal  
 Comments

Melvin Gibson AND

Original Recording Information:

Document #: Instrument 1234      Date Recorded: 12/25/2005 ...

Docket #:       Book:       Page:

Reconveyance Recording Information:

Document #:       Date Recorded:  ...

Docket #:       Book:       Page:

OK      Cancel

### Legal

The **Legal** screen will load the brief legal from the escrow file. You may edit the **Legal**.

**Reconveyance Update**

Escrow Number: 06000188      Notice Sent:  ...

COE Date: 02/27/2007 ...      Release of Obligation Sent:  ...

Beneficiary  
 Trustor  
 Trustee  
 Other #1  
 Other #2  
 Owner  
 **Legal**  
 Comments

Lot(s) 15, of Touch Stone, Map Book: 68, Map Page 125

Original Recording Information:

Document #: Instrument 1234      Date Recorded: 12/25/2005 ...

Docket #:       Book:       Page:

Reconveyance Recording Information:

Document #:       Date Recorded:  ...

Docket #:       Book:       Page:

OK      Cancel

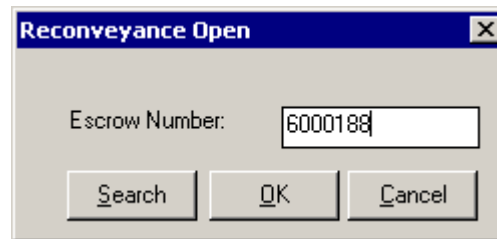
## Comments

The **Comments** screen will allow you to enter any comments about the file.

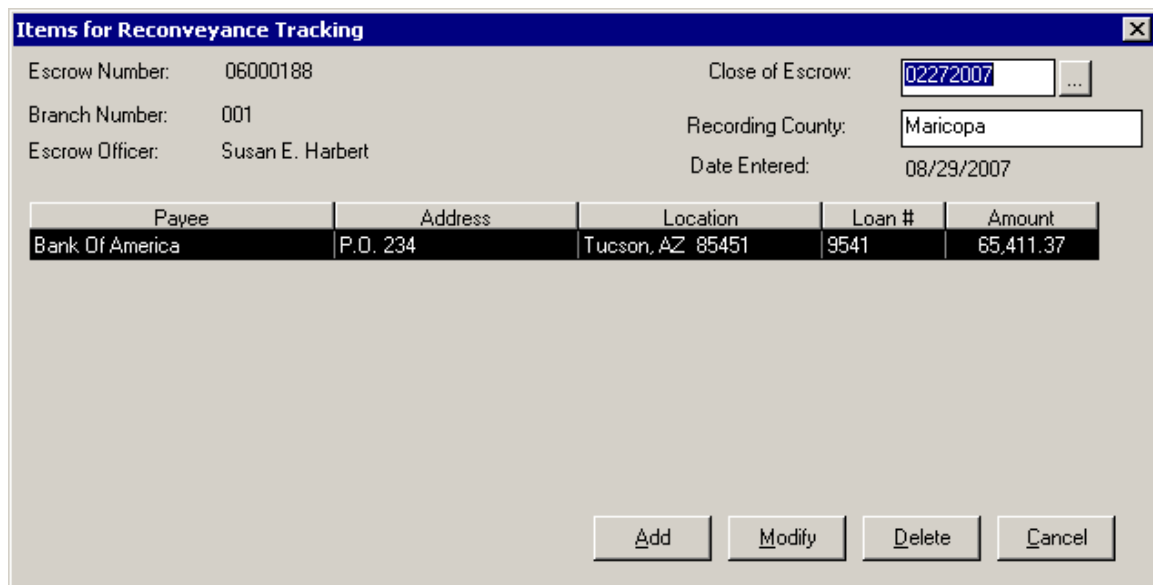
**NOTE:** Fields entered into **Reconveyance Tracking** do NOT update the fields in the escrow file.

## Open

The **Open** feature allows you to reopen an existing file previously established in the **Reconveyance Tracking** module. When you select **Open** the **Reconveyance Open** screen will appear. Enter your **Escrow Number** and click on **OK** to open the **Items for Reconveyance Tracking**. (See the **Items for Reconveyance Tracking** section). You may then **Add, Modify, Delete** any new or existing payoffs, or **cancel** to return to the desktop.



A dialog box titled "Reconveyance Open" with a close button (X) in the top right corner. It contains a label "Escrow Number:" followed by a text input field containing the value "6000188". Below the input field are three buttons: "Search", "OK", and "Cancel".



A window titled "Items for Reconveyance Tracking" with a close button (X) in the top right corner. It displays the following information:

- Escrow Number: 06000188
- Close of Escrow: 02272007
- Branch Number: 001
- Recording County: Maricopa
- Escrow Officer: Susan E. Harbert
- Date Entered: 08/29/2007

Payee	Address	Location	Loan #	Amount
Bank Of America	P.O. 234	Tucson, AZ 85451	9541	65,411.37

At the bottom of the window are four buttons: "Add", "Modify", "Delete", and "Cancel".

## Reconveyance Search

If you do not know your **Escrow Number** click on **Search**. The **Search** screen will appear where you can search by **Name** ( the payoff company name), **CheckNo** (the payoff check number generated from escrow), or the **Document No** ( the Document # from the Original Recording Information). Note: this is NOT the same **Name Search** screen reached from the Search button on the New File Entry screen.

## Search (Reconveyance Search)

The **Search** feature allows you to search all files existing in the **Reconveyance Tracking** database.

Select **Search** and the **Reconveyance Search** screen will be displayed. You may search on a **Name** (the original lender paying off), **CheckNo** (payoff check disbursed in escrow), **Escrow No** (only files established in the **Reconveyance Tracking** module), or **Document No** (the **Document #** from the **Original Recording Information**). Select your **Search Option**, then enter your information in the **Search For** box. Click on the **Search** button to continue or **Cancel** to return to the **Reconveyance Tracking** desktop. Highlight your file and double click to receive the **Reconveyance Update** screen.

**Reconveyance Search**

Search For:

Search Options:

Name  Escrow Number

CheckNo  Document No.

Name	Escrow #	Doc #	Check #	Date	Amount
BANK OF AMERICA	06000188	Instrument 1234	000159	02/27/2007	65,411.37

**Reconveyance Update**

Escrow Number: 06000188 Notice Sent:

COE Date: 02/27/2007 Release of Obligation Sent: 08/31/2007

Beneficiary  Trustor  Trustee  Other #1  Other #2  Owner  Legal  Comments

Beneficiary Name:

Name:

Address 1:

Address 2:

City, State and Zip:

Loan #:  Type of Instrument:

Date:  Amount:  Check #:

Original Recording Information:

Document #:  Date Recorded:

Docket #:  Book:  Page:

Reconveyance Recording Information:

Document #:

Docket #:  Book:  Page:

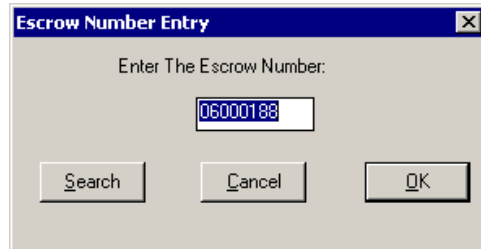
## Exit

The **Exit** function will close the **Reconveyance Tracking** module and return you to your desktop.

## View Menu

The **View** menu will allow you to display and print an escrow ledger of all the funds received in and disbursed. The **Escrow Ledger** is displayed to verify that the payoff check(s) were disbursed. The file does not have to be entered into the **Reconveyance Tracking** module to display an escrow ledger. Select **Escrow Ledger** from the **View** menu.

Enter your **Escrow Number** in the text box and click on **OK** to display the **Escrow Ledger**, or click on **Search** to find your file (See the **Name Search** section on how to use this function). Click on **Cancel** to return to the **Reconveyance Tracking** desktop.



The dialog box titled "Escrow Number Entry" has a close button (X) in the top right corner. It contains the text "Enter The Escrow Number:" followed by a text input field containing "06000188". Below the input field are three buttons: "Search", "Cancel", and "OK".

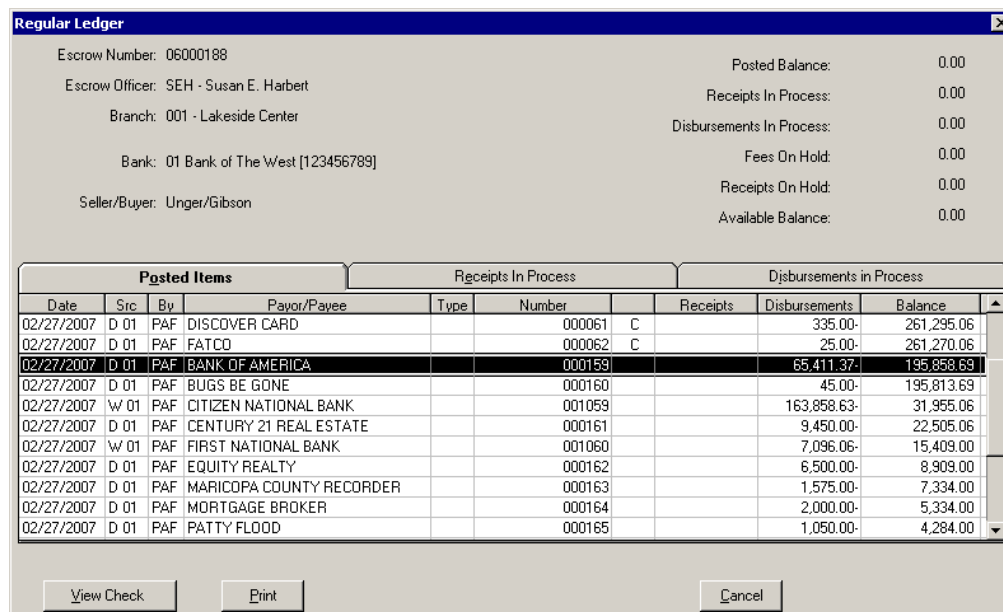
## Escrow Ledger

The ledgers show monies coming in and going out from an escrow file.

After selecting **OK** from this dialogue box the **Regular Ledger** screen will open.

The **Regular Ledger** will be presented, as shown here. General information about the file (**Escrow Number**, **Escrow Officer**, **Branch**, **Bank** currently assigned, and **Buyer** and **Seller** names) is presented on the top left of the screen, and summary accounting figures are presented on the top right. The **Posted Balance** is modified with the work **in process** and **on hold** to result in the **Available Balance** – which is what is left in the file to be disbursed

At the middle of the **Regular Ledger** screen are three (3) tabs, **Posted Items**, **Receipts In Process**, and **Disbursements In Process**. To switch from the **Posted Items** tab to the **Receipts In Process** (or any other) tab, click on the **Receipts In Process** (or any other) tab with the mouse, or use the **ALT+ character** Quick Keys.



The "Regular Ledger" window displays the following information:

Escrow Number: 06000188  
 Escrow Officer: SEH - Susan E. Harbert  
 Branch: 001 - Lakeside Center  
 Bank: 01 Bank of The West [123456789]  
 Seller/Buyer: Unger/Gibson

Summary Accounting Figures:

Posted Balance:	0.00
Receipts In Process:	0.00
Disbursements In Process:	0.00
Fees On Hold:	0.00
Receipts On Hold:	0.00
Available Balance:	0.00

The main table is divided into three tabs: **Posted Items**, **Receipts In Process**, and **Disbursements In Process**. The **Posted Items** tab is active, showing the following data:

Date	Src	By	Pavor/Payee	Type	Number	Receipts	Disbursements	Balance
02/27/2007	D	01	PAF DISCOVER CARD		000061	C	335.00-	261,295.06
02/27/2007	D	01	PAF FATCO		000062	C	25.00-	261,270.06
02/27/2007	D	01	PAF BANK OF AMERICA		000159		65,411.37-	195,858.69
02/27/2007	D	01	PAF BUGS BE GONE		000160		45.00-	195,813.69
02/27/2007	W	01	PAF CITIZEN NATIONAL BANK		001059		163,858.63-	31,955.06
02/27/2007	D	01	PAF CENTURY 21 REAL ESTATE		000161		9,450.00-	22,505.06
02/27/2007	W	01	PAF FIRST NATIONAL BANK		001060		7,096.06-	15,409.00
02/27/2007	D	01	PAF EQUITY REALTY		000162		6,500.00-	8,909.00
02/27/2007	D	01	PAF MARICOPA COUNTY RECORDER		000163		1,575.00-	7,334.00
02/27/2007	D	01	PAF MORTGAGE BROKER		000164		2,000.00-	5,334.00
02/27/2007	D	01	PAF PATTY FLOOD		000165		1,050.00-	4,284.00

Buttons at the bottom: View Check, Print, Cancel.

**NOTE:** There are three tabs on this screen: Posted Items, Receipts in Process and Disbursements in Process. Click on the tab heading to move from one to the other.

The ledger presents, for each transaction, from left to right:

**The date of the transaction; they are presented in date order**

**The type (receipt or disbursement) and source (bank account number); if the file has switched banks, you will see different source numbers on some of the items.**

**Who entered the item (user's initials)**

**The payor of a receipt or the payee on a disbursement**

**The receipt type (only on receipts)**

**The reference number of the item (receipt number or check number); an "M" beside the check number denotes it was a manually prepared check; a "C" beside a check number indicates the check has been cleared, through a reconciliation; an "H" will appear on a receipt that is on hold (remember: only Accounting can release non-current-date holds), and a "V" will reflect a Void.**

**The amount (either in the receipts column or in the disbursements column, as appropriate**

**And the running balance through each transaction**

### View Check

If you highlight a disbursement ledger item you may view the detail information of the check

The screenshot shows a dialog box titled "View Check" with the following information:

Escrow Number:	06000188
Bank:	01 - Bank of The West[123456789]
Branch:	001 - Lakeside Center
Date:	02/27/2007
Amount:	-65,411.37
Payee Name:	BANK OF AMERICA
Address:	P.O. 234
Address 2:	
Location:	TUCSON, AZ 85451
Memo Line:	Loan # 9541
Print Queue:	HP LaserJet 4300 PCL 5e

A "Cancel" button is located at the bottom right of the dialog box.

The **View Check** will display the following information.

- **Escrow Number**
- **Bank** the check was drawn on
- **Branch** the Escrow Number was assigned to
- **Date** the check was issued
- **Amount** of the check
- **Payee Name** and **Address**

- **Memo Line**
- **Print Queue** – The name of the printer on which the check was printed.

### Savings Ledger

The **Savings Ledger** shows financial information for interest bearing accounts linked to an escrow. A file may or may not have a **savings ledger**. If a savings account is attached to an escrow file you will have a **Savings** button at the bottom of the ledger screen.

**Regular Ledger**

Escrow Number: 06000188  
 Escrow Officer: SEH - Susan E. Harbert  
 Branch: 001 - Lakeside Center  
 Bank: 01 Wells Fargo [123456789]  
 Seller/Buyer: Unger/Gibson

Posted Balance: 335.00  
 Receipts In Process: 0.00  
 Disbursements In Process: 0.00  
 Fees On Hold: 0.00  
 Receipts On Hold: 0.00  
 Available Balance: 335.00

Posted Items				Receipts In Process		Disbursements in Process		
Date	Src	By	Pavor/Payee	Type	Number	Receipts	Disbursements	Balance
02/25/2007	R 01	PAF	Gibson	EM	001159	5,000.00		5,000.00
02/26/2007	R 01	PAF	M. Gibson	CF	001160	8,953.06		13,953.06
02/27/2007	R 01	PAF	M. Gibson	CF	001162	1,000.00		14,953.06
02/27/2007	R 01	PAF	Countrywide Mortgage	WIN	001170	231,677.00		246,630.06
02/27/2007	R 01	PAF	Bank of America	WIN	001171	15,000.00		261,630.06
02/27/2007	D 01	PAF	DISCOVER CARD		000061		335.00	261,295.06
02/27/2007	D 01	PAF	FATCO		000062		25.00	261,270.06
02/27/2007	D 01	PAF	BANK OF AMERICA		000159		65,411.37	195,858.69
02/27/2007	D 01	PAF	BUGS BE GONE		000160		45.00	195,813.69
02/27/2007	W 01	PAF	CITIZEN NATIONAL BANK		001059		163,858.63	31,955.06
02/27/2007	D 01	PAF	CENTURY 21 REAL ESTATE		000161		9,450.00	22,505.06

Posted Savings Balance: 5,000.00

Buttons: Print, Savings, Cancel

Click on the **Savings** button, to open the **Savings Ledger**.

**Savings Accounts**

Escrow Number: 06000188

Account	Bank Name	Trm Date	Balance
12-854612	ARIZONA BUSINESS BANK	09/20/2007	5,000.00

Buttons: Select, Cancel

Highlight the desired savings account and then click on **OK**, or simply double-click on the item to open the **Savings Ledger** screen. Alternatively, click on **Cancel** to return to the Impact desktop.

The **Savings Ledger** will display and print who the savings account was **Opened For**, a specific entity. The name of the entity is taken from the information entered within the **Name** field when the savings was set up. The **Opened For** information is useful when multiple savings accounts are opened under one escrow.



## Reports Menu

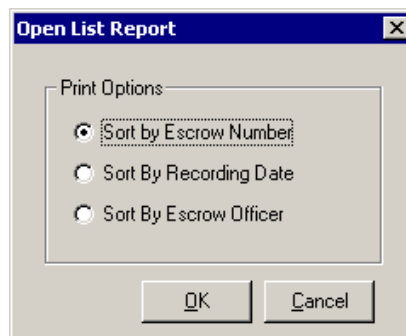
The Reports menu will generate the following reports:

- **Open List**
- **Notice of Intent**
  - **Ticklers**
  - **Print All**
  - **Print Specific**
  - **Set Notice Sent Date**
- **Release of Obligation**
  - **Ticklers**
  - **Print All**
  - **Print Specific**
  - **Set Release Sent Date**

### Open List

The **Open List Report** will list all files entered into the **Reconveyance Tracking** module.

The **Open List Report** will give you three print options, **Sort by Escrow Number**, **Sort By Recording Date**, or **Sort By Escrow Officer**. Click on the radio button to generate the report for a specific sort option. After selecting the report **Print Option** click on the **OK** button for the print dialog box to appear, where you can preview or print the **Open List**.



The **Open List Report** will show the **Escrow** number, the **Branch** the escrow file is assigned to, the **Recorded** date (the **Close of Escrow Date**) and the payoff **Name**.

Open Items Report			
Sorted by Escrow Number			
Date:	08/30/2007		Page: 1
Escrow	Branch	Recorded	Name
00000001	010	12/25/2006	Wells Fargo Bank
00000002	010	12/21/2005	Chase Bank
06000001	010	06/24/2006	Mercury Bank
06000001	010	06/24/2006	State Bank
06000111	010	09/08/2006	Wells Fargo Bank
06000188	001	02/27/2007	Bank Of America

## Notice of Intent

### Ticklers

The **Ticklers** give a listing of all **Reconveyance Tracking** files that do not have their **Notice of Intent Date** set and are “x” number of days either from the **COE Date** or the **Date Entered** into the **Reconveyance Tracking** module. Your system configuration determines whether the **Notice of Intent Date** is based on the **COE Date** or the **Date Entered** into **Reconveyance Tracking** and the number of days from the date to trigger the tickler.

Select **Ticklers** to generate the print dialog box. If there are no entries to print you will receive the **Print Notice of Intent Ticklers** prompt. Press **OK** to return to the **Reconveyance Tracking** desktop.



**NOTE:** You will receive the **Print Notice of Intent Ticklers** prompt above if your reconveyance file does not have a **Document #** entered in the **Original Recording Information** and/or information was not entered into the **Reconveyance Recording Information** area in the **Reconveyance Update** screen..

Entries on the **Ticklers** are ready to have the letter for the **Notice of Intent** created.

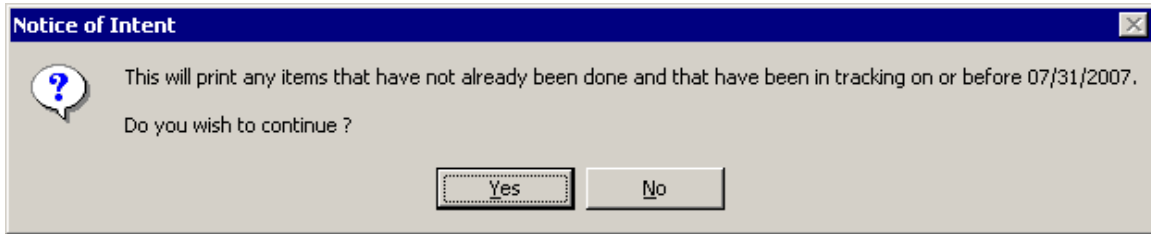
The **Ticklers** will show the **Escrow** number, **Recorded** date and **Document Number/Book & Page** from the **Original Recording Information** and the recording **County** from the **Items for Reconveyance Tracking** screen.

RECONVEYANCE TRACKING SYSTEM			
Notice of Intent Documents awaiting processing as of 09/05/2007			
Sorted by County, Escrow Number			
Date:	09/05/2007		Page: 1
Escrow	Recorded	Document Number/Book Page	County
00000001	09/20/1980	Doc ID 945	Maricopa
06000111	06/12/1972	1-3450707	Maricopa
06000188	12/25/2005	Instrument 1234 178/649	Maricopa

**Print All**

The **Print All** feature will generate the letter of Intent, a copy of the Release for all parties involved, plus a check list of parties involved with mailing labels for the files listed on the Notice of Intent Ticklers.

Select **Print All** and you will receive the **Notice of Intent** prompt. Click on **Yes** to generate the notices or click on **No** to return to the **Reconveyance Tracking** desktop.



NOTICE OF INTENT TO RECORD RELEASE OF OBLIGATION  
UNDER DEED OF TRUST PURSUANT TO A.R.S. 33-707.E

TO: Gary and Judi Fleming  
ADDRESS: 6400 E. Calle Casto  
Tucson, AZ 85716

You are hereby notified that, thirty (30) calendar days after mailing this Notice, pursuant to the provisions of A.R.S. 33-707.E, the undersigned Title Insurer (as defined in A.R.S. 33-1962) intends to record in the Office of the County Recorder in which the below described Deed of Trust is recorded, a RELEASE OF THE DEED OF TRUST, a copy of which is attached to this Notice.

The following DEED OF TRUST will be affected by the release:

TRUSTOR: Gary and Judi Fleming  
TRUSTEE: Capital Title  
BENEFICIARY: Brandon Unger and Amy Unger

RECORDED in the Office of the County Recorder of Maricopa, State of Arizona.

Recording Date: December 25, 2005  
Recorder's No.: Instrument 1234 178

Date of Mailing Notice: August 30, 2007

Escrow No.: 06000188

TITLE INSURER:  
XYZ TITLE AGENCY, INC.  
XYZ TITLE AGENCY, INC.

By: \_\_\_\_\_

COPY

When recorded mail to:  
XYZ TITLE  
123 Main Street  
Phoenix, AZ 85012  
Escrow Number: 06000188

**RELEASE AND RECONVEYANCE BY TITLE INSURER OF DEED OF TRUST  
PURSUANT TO A.R.S. 33-707.E**

Pursuant to the provisions of Section 33-707.E of the Arizona Revised Statutes, the undersigned Title Insurer hereby releases and conveys the following Deed of Trust:

BENEFICIARY (or Successor in Interest): Brandon Unger and Amy Unger  
TRUSTEE (or Successor in Interest): Capital Title  
ORIGINAL TRUSTOR: Gary and Judi Fleming

RECORDED in the Office of the County Recorder of Maricopa, State Of Arizona.

Recording Date: December 25, 2005  
Recorder's No.: Instrument 1234 178

DATE AND AMOUNT OF PAYMENT: February 27, 2007 \$65,411.37

The Insurer signed has actual knowledge that the obligation secured by this Deed of Trust has been paid in full. The Release and Reconveyance shall constitute a Deed of Release and Reconveyance of Deed of Trust as set forth pursuant to A.R.S. 33-707.E

TITLE INSURER:  
XYZ Title

DATED: \_\_\_\_\_

By: \_\_\_\_\_

STATE OF ARIZONA )  
County of Maricopa ) ss  
The Release and Reconveyance by Title Insurer of Deed of Trust Pursuant to A.R.S. 33-707.E was acknowledged before me this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_, by \_\_\_\_\_ of \_\_\_\_\_ of \_\_\_\_\_ of \_\_\_\_\_

(Notary Public)

My commission expires: \_\_\_\_\_

The **Notice of Intent** and **Release** is customized for each Title Company.

The **Check Off List** shows the parties receiving a **Notice of Intent** and **copy of the Release** for each file.

The laser generated mailing labels prints three labels for each party receiving the **Notice of Intent**.

**NOTE:** If no **Type of Instrument** is selected in the **Reconveyance Update** screen, then no **Notice of Intent** will print.

Check Off List				
Date: 08/30/2007				
File Number: 06000188		Gary and Judi Fleming 6400 E. Calle Casto Tucson, AZ 85716	Gary and Judi Fleming 6400 E. Calle Casto Tucson, AZ 85716	Gary and Judi Fleming 6400 E. Calle Casto Tucson, AZ 85716
Document No: Instrument 1234			DRS 06000188	DRS 06000188
Notice Sent: 08/30/2007				DRS 06000188
Gary and Judi Fleming 6400 E. Calle Casto Tucson, AZ 85716		Capital Title P.O. Box 834 Phoenix, AZ 85032	Capital Title P.O. Box 834 Phoenix, AZ 85032	Capital Title P.O. Box 834 Phoenix, AZ 85032
			DRS 06000188	DRS 06000188
Bank Of America P.O. 234 Phoenix, AZ 85032		Bank Of America P.O. 234 Tucson, AZ 85451	Bank Of America P.O. 234 Tucson, AZ 85451	Bank Of America P.O. 234 Tucson, AZ 85451
			DRS 06000188	DRS 06000188
Bank Of America P.O. 234 Tucson, AZ 85451				DRS 06000188

### Print Specific

You may print a specific **Notice of Intent** on any file. Select **Print Specific** and you will be prompted to enter your **Escrow Number**. Click on **Search** if you do not know your file number. (See section on **Reconveyance Search**). Click on **OK** to receive the **Print Specific Notice of Intent** screen or **Cancel** to return to the **Reconveyance Tracking** desktop.

Notice Date	Release Date	Name
<input checked="" type="checkbox"/>		Bank Of America

The **Print Specific Notice of Intent** screen will display all the payoffs entered for your **Escrow Number**. If a **Notice Date** or **Release Date** was previously entered they will be displayed along with the payoff **Name**.

Check the box for each **Notice of Intent** you want to print. The **Notice of Intent** and a **copy of the Release** will print for all parties involved, plus a **check list** of parties involved with mailing labels for the file.

After you print the specific **Notice of Intent** you will be prompted to set the **Notice Sent Date**. Click on

**Yes** to update the **Notice Sent Date** or click on **No** to return to the **Reconveyance Tracking** desktop.

**Set Notice Sent Date**

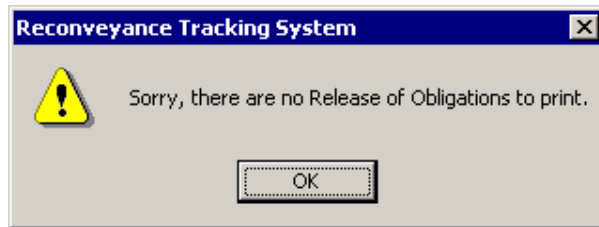
The **Set Notice Sent Date** will allow you to update the **Notice Sent Date** on all files that appeared on the **Notice of Intent Ticklers**. You do not have to print the **Notice of Intent** to update the **Set Notice Sent Date**.

**Release of Obligation**

**Ticklers**

The **Ticklers** give a listing of all **Reconveyance Tracking** files that do not have their **Release of Obligation Sent** date set and are “x” number of days from the **Notice Sent** date. The number of days from the **Notice Sent** date is a system configuration.

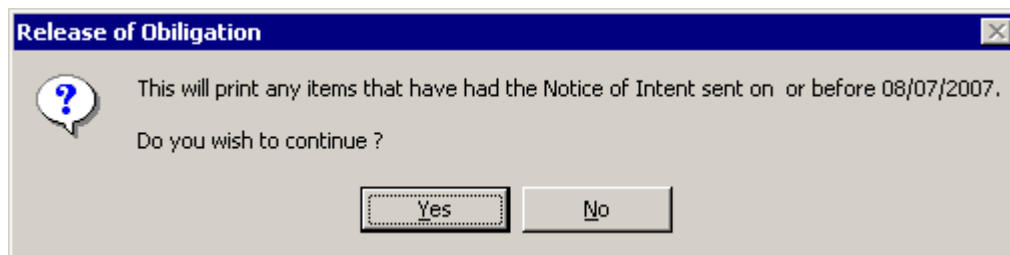
Select **Ticklers** to generate the print dialog box. If there are no entries to print you will receive a prompt stating no **Release of Obligations** to print. Press **OK** to return to the **Reconveyance Tracking** desktop.



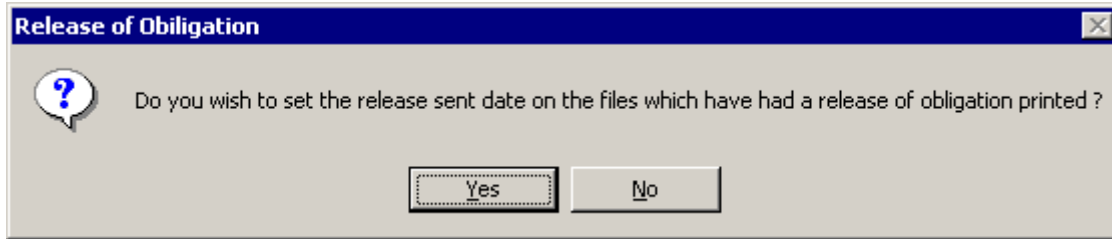
**Print All**

The **Print All** feature will generate the **Release of Obligation** document for each payoff listed on the **Ticklers**.

Select **Print All** and you will receive the **Release of Obligation** prompt. Click on **Yes** to receive the printer dialog box and generate the releases or click on **No** to return to the **Reconveyance Tracking** desktop.

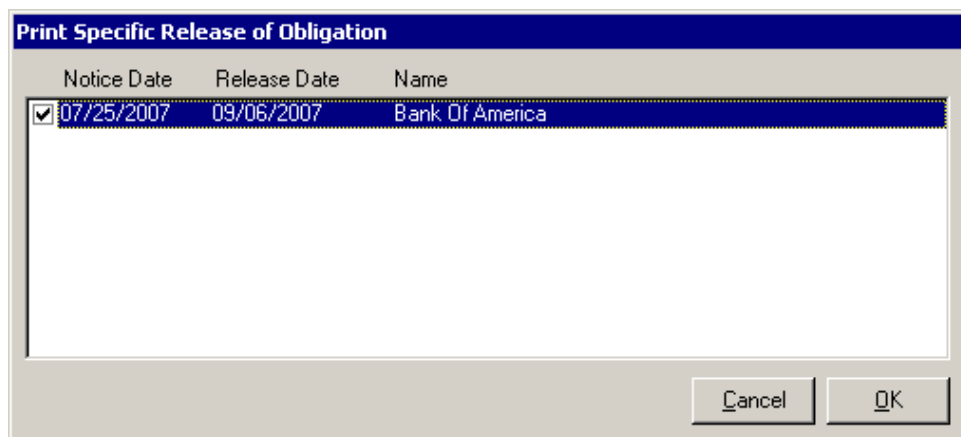


After the releases are printed you will be prompted to update the **Release Sent Date**. Click on **Yes** to update the **Release of Obligation Sent** date or **No** to return to the tracking desktop.



### Print Specific

You may print a specific **Release of Obligation** on any file. Select **Print Specific** and you will be prompted to enter your **Escrow Number**. Click on **Search** if you do not know your file number. (See section on **Reconveyance Search**). Click on **OK** to receive the **Print Specific Release of Obligation** screen or **Cancel** to return to the **Reconveyance Tracking** desktop.



The **Print Specific Release of Obligation** screen will display all the payoffs entered for your **Escrow Number**. If a **Release Date** was previously entered they will be displayed along with the payoff **Name** and the **Notice Date**.

Check the box for each **Release** you want to print.

After you print the **Release** you will be prompted to set the **Release of Obligation Sent** date. Click on **Yes** to update the release date or click on **No** to return to the **Reconveyance Tracking** desktop.

### Set Release Sent Date

The **Set Release Sent Date** will allow you to update the **Release of Obligation Sent** date on all files listed on the **Release of Obligation Ticklers**. You do not have to print the **Release of Obligation** to update the **Set Release Sent Date**.

### Get INGEO Releases

This option not in use.

## Tools Menu

The **Tools** Menu will allow you to configure the **Reconveyance Tracking** system on when to send the **Notice of Intent** and when to record the **Release of Obligation**. You will also have the option of purging all files from the **Reconveyance Tracking** module which have met certain requirements.

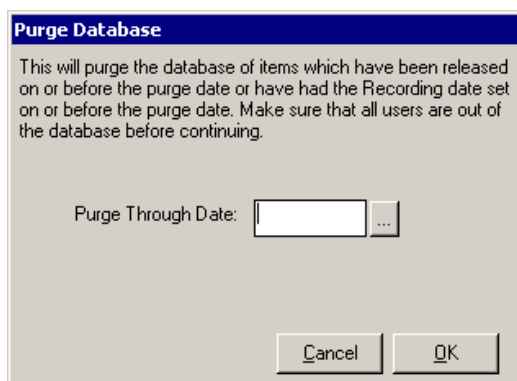
The **Tools Menu** will present the following items:

- **Purge**
- **Configuration Options**
- **Type of Document Table Maintenance**

### Purge

The **Purge** option will allow you to delete files from the Reconveyance Tracking system. Enter the **Purge Through Date** and click on **OK**, else click on **Cancel** to return to the **Reconveyance Tracking** desktop.

All files with a **Release of Obligation Sent** date set on or before the **Purge Through Date** or all files with the **Reconveyance Recording Information Date Recorded** set on or before the **Purge Through Date** will be deleted from the Reconveyance Tracking system.



### Configuration Options

The **Configuration Options** allow the Title company to configure the **Reconveyance Tracking** system based on the date the file was entered into **Reconveyance Tracking (Date Entered)** or the date the file was closed (**Date File Closed**) within the Escrow module, along with the number of days before a file will appear on the **Notice of Intent Ticklers** and **Release of Obligation Ticklers**.

The **Configuration Options** screen will display the following configurations:

- **Select State:**
- **# Days Intent:**
- **#Days Release of Obligation**
- **Enable INGEO Export**
- **Select option to use for # of Day Calculations**
  - **Date Entered**
  - **Date File Closed**

### Select State

Select **Arizona** or **Nevada**. **Arizona** will require a **Type of Document Table**.

### # Days Intent

Enter the number of days from **Date Entered** or **Date File Closed** you would like to have your file appear on the **Notice of Intent Ticklers**.

### # Days Release of Obligation

Enter the number of days from the **Notice Sent** date you would like to have your file appear on the **Release of Obligation Ticklers**.

### Enable INGENO Export

This function is not available.

### Select option to use for # of Day Calculations

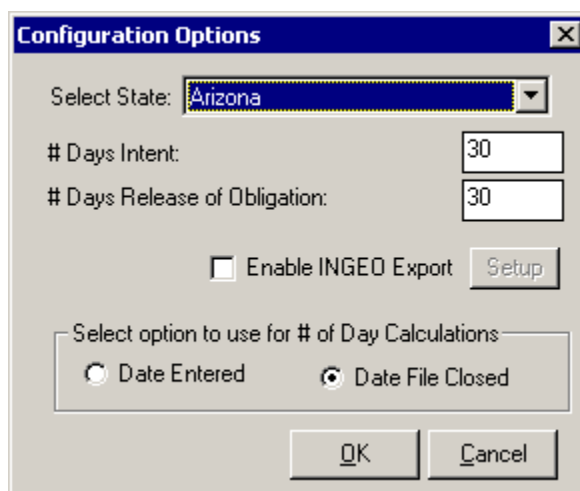
#### Date Entered

Selecting **Date Entered** will base the **# Days Intent** from the date the file was inputted into the **Reconveyance Tracking** system.

#### Date File Closed

Selecting **Date File Closed** will base the **# Days Intent** from the escrow closing date.

Click on the **OK** button to retain your entries, else click on **Cancel** to return to the **Reconveyance Tracking** desktop.



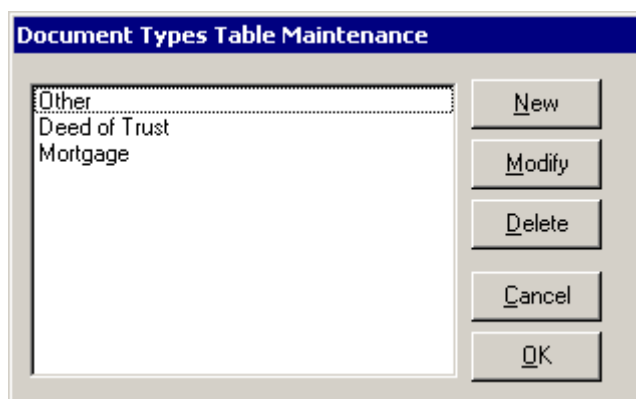
The screenshot shows a dialog box titled "Configuration Options" with a close button (X) in the top right corner. The dialog contains the following elements:

- "Select State:" with a dropdown menu showing "Arizona".
- "# Days Intent:" with a text input field containing "30".
- "# Days Release of Obligation:" with a text input field containing "30".
- An unchecked checkbox labeled "Enable INGENO Export" next to a "Setup" button.
- A section titled "Select option to use for # of Day Calculations" containing two radio buttons: "Date Entered" (unselected) and "Date File Closed" (selected).
- "OK" and "Cancel" buttons at the bottom.

## Type of Document Table Maintenance

The **Type of Document Table Maintenance** option is only available if **Arizona** is selected for the state. This table appears on the **Reconveyance Update** screen for **Type of Instrument**. The **Type of Instrument** is the name of the release that will be recorded.

The **Document Types Table Maintenance** will allow you to create a **New** entry, **Modify** an existing entry, **Delete** an existing entry, **Cancel** to return to the **Reconveyance Tracking** desktop or **OK** to retain your changes.

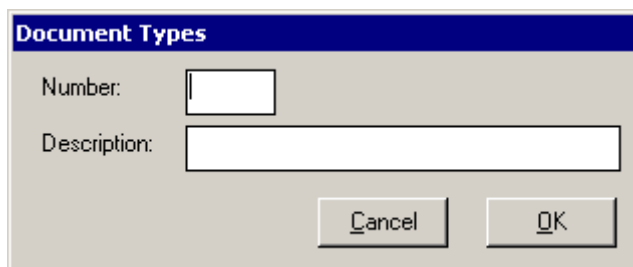


### New

Click on **New** to open the **Document Types** screen. Enter a unique one character number for the document **Number**. Enter the name of the document in the **Description** field. Click on the **OK** button to save your information and return to the **Reconveyance Tracking** desktop, or click on **Cancel** to return to the **Reconveyance Tracking** desktop.

### Modify / Delete

Highlight an entry in the **Document Types Table Maintenance** screen and click on **Modify** to change the **Description** or **Delete** to remove the entry from the table. Click on **OK** to save your changes and return to the **Reconveyance Tracking** desktop, or click on **Cancel** to exit the table.



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## Naf Menu

The Name and Address File (**Naf**) or customer list is a very important tool in Impact. Depending on the company's configuration, there may be one centralized **Naf** or a different **Naf** for each branch. The Name and Address File (**Naf**) is displayed in a tiered manner: Company – Branch - Individual. This provides a good way to show the relationship between an individual and where he/she works.

The **NAF** menu consist of:

**Add and Modify Ctrl+N**

**Print**

### Add and Modify

Maintenance of the **Naf** is done through this menu, if you have authorization to change the **Naf**. The **Naf** can be centralized or branch-specific, depending on system configuration. The **Naf** can also be limited as to whom is permitted to edit it.

In the **Search for Name starting with** field, type in a search term of at least two (2) characters, and Impact will automatically display the results, or you may use the percent sign (%) as a wildcard character.

You may narrow your search by selecting one of the 8 **Search Options** and/or search parameters, by **Name, ID, county, or state**. You may check the **Expand** box and see any relationships to the company name that have been added.

**NOTE:** If you are not authorized to edit the **Naf** then the **New, Modify** and **Delete** buttons will be deactivated (dimmed out).

**Name and Address File**

Search Options:  
 All    Title Companies    Payoff Lenders    Real Estate Brokers    Attorneys  
 Lenders    Miscellaneous    Mortgage Brokers    Other

Search for name starting with:    Search by ID:    ID No:    Inactive:

Search by county:    Search by state:     expand

Name	Address
<b>Century 21 Real Estate</b>	<b>324 Long River Road</b>
<i>John Listing</i>	<i>324 Long River Road</i>
<i>Sharon Selling</i>	<i>324 Long River Road</i>
<i>Tricia Ramsey</i>	<i>945 E. Courtland Drive.</i>
<i>Mike Talyor</i>	<i>123 N. Bay Street</i>
<b>Century of Homes</b>	<b>35 Parade Avenue</b>

Name:   
 Contact Name:   
 Address 1:   
 Address 2:   
 City:   
 State:    Zip:   
 County:   
 Phone:    Fax:   
 Cell:   
 Email Address:   
 Comments:   
 Bank Name:   
 Account No:    Routing No:   
 Date Entered: 10/10/2006 2:18:35 PM  
 Date Modified: 12/18/2006 11:11:03 AM by PAF

In the search results display, the company entries are bolded, branch entries are not bolded and individuals' entries are italicized for enhanced readability.

### New

You can add a new **Naf** entry by clicking on the **New** button. Impact will display a prompt asking if you would like to: add a new Company, add a branch under the Company currently selected, add an individual user under the Branch selected or add an individual user under the Company. Based on your selection you will be presented with an empty form on the right side of the NAF screen. Complete the form with as much information as is available. Click on **Save** to accept your entries, or on **Cancel** to quit without saving.

**New NAF Entry**

You are trying to add a new entry to the NAF, please select one of the following options:

Add a new company

Add a branch under:  
 Company: **Century 21**  
 Address: **987 Illinois Ave**

Add an Individual under:  
 Branch **Century 21 - Paradise Valley**  
 Address: **987 Illinois Ave**

Add an Individual under:  
 Company: **Century 21**  
 Address: **987 Illinois Ave**

By clicking on the **New** button the **New NAF Entry** form is opened.

In the updated screen below, the left side of the screen shows the completed set of data for the Company with a branch, branch users, company users and a second company listed.

**Name and Address File**

Search Options:

All    Title Companies    Payoff Lenders    Real Estate Brokers    Attorneys  
 Lenders    Miscellaneous    Mortgage Brokers    Other

Search for name starting with:    Search by ID:

Search by county:    Search by state:     Expand

Name	Address
<b>Century 21</b>	<b>987 Illinois Ave</b>
Century 21 - Paradise Valley	987 Illinois Ave
Sandy Proper	123 Welcome Trail
Janice Helper	987 Illinois Ave
Century 21 - Williams Redro	1259 Red Rock Road

ID No:  Inactive

Name: Century 21

Contact Name:

Address 1: 987 Illinois Ave

Address 2:

City: Phoenix

State: AZ - ARIZONA   Zip: 99999

County: Maricopa

Phone:    Fax:

Cell:

Email Address:

Comments:

Bank Name:

Account No:    Routing No:

Date Entered: 05/04/2007 8:32:17 AM by DAD

Date Modified:

## Modify

To make changes to a **Naf** item, highlight a name and then click on **Modify** to open the **Modify Name and Address** screen.

Select one of the **Search Options**, then modify fields as needed on the rest of the screen. Depending on system configuration, an automatic **Id No** can be assigned to each customer. The automatic **ID No**'s are useful to coordinate customer numbering with an outside accounting system. The **Comments** area of the screen can be used for information for which there are not fields.

At the bottom of the screen the **Naf** has fields available for a **Bank Name**, **Account Number** and **Routing Number**. This is useful information to have filled out before wiring money. The bank **Routing Number** must be a valid receiving bank ABA number or Impact will not accept the routing number. While bank routing numbers are downloaded from the Federal Reserve website and updated by the system administrator periodically, in order to validate ABA #'s on wire entries, the entries in the NAF are **NOT** updated by the ABA downloads, nor validated when entered here.

The **NAF** function allows the user to flag a **NAF** record as **Inactive**. Setting a **Company level record** as **Inactive**, sets all related parties as **Inactive**. Setting a single related party as **Inactive** will dim the specific entry and still allow the user to use the **Company level record** and any other records not set as **Inactive**.

Click on **Cancel** to abort any changes and return to the **Name and Address File** screen, or **Save** to save any changes or new entries to the screen.

### Delete

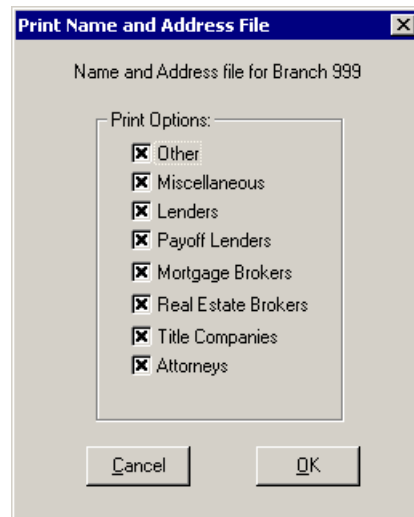
**Delete** will delete the entire **Naf** entry (a dialogue box will ask for confirmation).

### Print

A name and address listing can be generated for any or all of the **Naf** categories. By default, in the **Print Options** area of the screen, all the fields are checked. Place the cursor on a check box, and uncheck any categories that should not be printed.

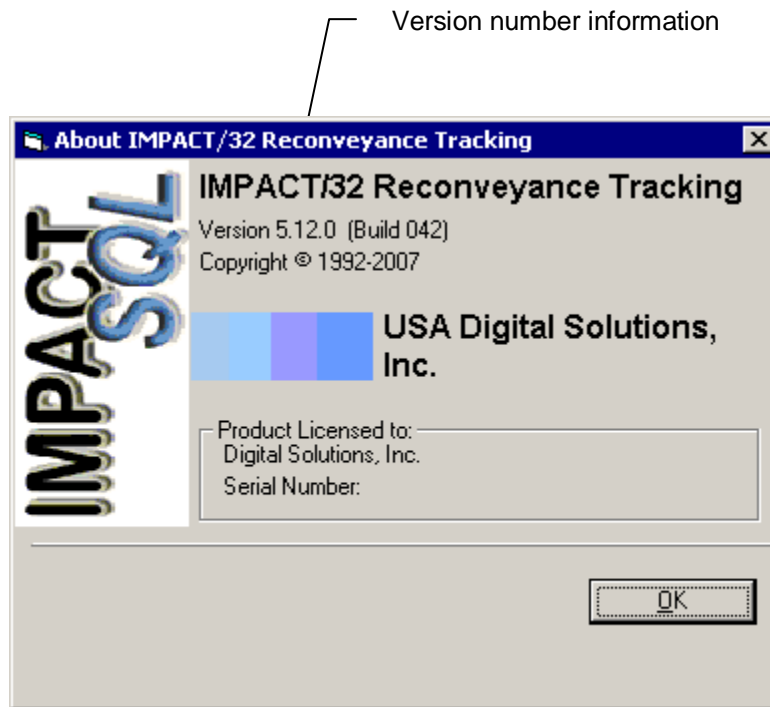
Click on **OK** to print, or **Cancel** to abort any changes and return to the Impact desktop.

Optionally, click on **OK**, then on **Preview**. From this preview screen, these print results can be exported to a file (click on the envelope-with-arrow icon on the top left corner of the screen), for example a .CSV file, and used in Microsoft Word via the **Tools > Letters and Mailings > Mail Merge** function, for seasonal greeting cards, mass mailing, etc.



## About Menu

To determine the Impact Title module version and build number, select this menu option. Please have this version number information available when calling the Help Desk for assistance.



**NOTE:** The build number for each Impact/SQL module may be different from another Impact/SQL module, for example, the Escrow module may not be the same build as the Title module.

## Appendix A - Troubleshooting

USA Digital Solutions Support personnel may ask that you make a screen shot so that you can e-mail Support a “picture” of the screen as it appears when the error occurs.

To create this screen shot and save it for the Support personnel:

Press the **Print Screen** key on the keyboard, which is usually located on the top row of the keyboard, and is usually the third key from the right.

At bottom left of your screen, click on the **start** button. From the menu, select **New Office Document**.

After the Microsoft Word application starts, go to the top left of the screen with the cursor and from the menu select **File > New**.

As soon as Microsoft Word opens a new document, go to the top left of the screen with the cursor and from the menu select **Edit > Paste**.

After the screen shot is pasted into the document, go to the top left of the screen with the cursor and from the menu select **File > Save**. Save this document in a location from where you can send it as an e-mail attachment (navigate to wherever you put non-Impact Microsoft Word documents). You will have to remember the path and the document name in order to locate this document later.

After the document is saved, go to the top left of the screen with the cursor and from the menu select **File > Close** to close Word.

Return to your Impact session, and finish the current process.

Now e-mail the saved document as an attachment, via your normal e-mail routine, to the email address provided by USA Digital Solutions Support personnel. USA Digital Solutions Support personnel can be reached at (602) 866-8199 extension 2.