

Introduction to Impact/SQL Version 8.0

Impact/SQL has been re-written in a new programming language (C#.Net). The first release of the re-written program files are version 8.0, and this version is designed to maintain compatibility with the earlier 7.8 version of Impact. This has been done to enable users to switch back to using version 7.8 if major issues arise, in 8.0, which must be hot fixed.

The key point to understand is that while the look of the screens may be different, the functionality is the same and, in the vast majority of situations, the functionality is in the same locations as with version 7.8. Users comfortable with version 7.8 should, with a very brief acclimation period, be comfortable with version 8.0.

General changes are the use of tree-views to select data, grids to present data and more icons to drive action, rather than menu entries. The effort has been made to utilize similar icons throughout the program to indicate common behaviors. Some of the commonly utilized icons are shown below.

 Exit	To exit, click on the  Exit icon, located in the upper right corner of the Impact desktop window.
 Active  Inactive	The  Active icon indicates [record type] is active. The  Inactive icon indicates [record type] is inactive.
 Print	To generate and print a report of [anywhere you can print something], click on the  Print icon at the top of the screen.
 Modify	To view or change the information for an existing entry on a grid, highlight the entry on the grid that you wish to modify, and then click the  Modify icon to the right of the selected entry or double click on the entry.
 Delete	To delete an entry on a grid, click the  Delete icon to the right of the entry.
 Information	On grids where more information is available on items listed, there will be an  Information icon to the right of each record. Click on that icon to open a screen of more information, but not in "modify" mode.
 NAF	The Name and Address File (NAF) is available when the  NAF icon is in color.
 Refresh	The  Refresh icon is used to refresh the window's content.
 Collapse &  Expand	These icons are used to hide or present a section of a window, to provide more space for one portion, or more information, depending on which is used, and on which window.
 New	This icon is used to create a new item.
 Calendar	This icon brings up the calendar tool.
 Ledger	This icon will present the ledger related to the item involved.
 File Status	This icon will present the file status screen.
 Void	This icon indicates the void function.

The toolbar icons have also changed, but are in the same order as in 7.8. The Escrow tool bar is shown below.



Button	Tool Name	Quick Keys
	New File	ALT+F then S then N
	Save File	ALT+F then A
	Open Existing File	ALT+F then S
	File Status	ALT+F then F
	Copy File	ALT+F then C
	Search For File	ALT+F then F then S
	Name and address file (Naf)	ALT+A then A
	Conversation Log	ALT+F then L
	View Escrow History	ALT+F then V
	Select & Edit Documents	ALT+O then D
	Amortization Schedule	ALT+M then Z
	Rate Calculator	ALT+M then R
	Ticklers	ALT+I then S
	Tracking	ALT+F then T
	Deposit Slips	ALT+T then S

Read-Only access is also made available in version 8.0 of Impact/SQL. Should a file the user is trying to access be open on another user's desktop, the user will be prompted as to whether they would like to look at the file in "read-only" mode, which is often sufficient for information review.

The sample ledger below provides a representative sample of a tree-view and grid window, and presents some of the commonly used icons. Note that the Print option has been moved to the top of the screen, and an alternate file can be requested from there as well.

Ledger

Change File | Print | Collapse Summary

File Number: DSITEST **Balance:** 10,000.00
Escrow Officer: SL2 - Sherri Lamb-002:EO **Receipts In Process:** 220.00
Branch: 998 - Training Branch **Disbursements In Process:** 0.00
Bank: 01 - 1st National Bank of Nevada [123456789] **Receipts On Hold:** 0.00
Seller / Buyer: Seller/Buyer **Adjustments In Process:** N/A
Available Balance: 10,220.00

Pgsted Items			Receipts In Process			Disbursements in Process		
Date	Src	By	Payor / Payee	Type	Number	Receipts	Disbursements	Balance
11/29/2007	R 01	LH	Greenly	EM	001000	10,000.00		10,000.00
08/16/2012	R 01	JW	test	ADJ	001158	0.01		10,000.01
08/16/2012	R 01	JW	test	NSF	001158	-0.01		10,000.00
08/16/2012	D 01	JW	TEST MANUAL CHECK ENTRY		10000001		-1.00	9,999.00
08/16/2012	D 01	JW	VOID VOID VOID TEST VOID MAN...		10000001		1.00	10,000.00
08/21/2012	R 01	JW	Transfer to Branch to 002/01	TBR	000000	-10,000.00		0.00
08/21/2012	R 01	JW	Transfer to Branch from 998/01	TBR	000000	10,000.00		10,000.00
08/21/2012	R 01	JW	Transfer to Branch to 998/01	TBR	000000	-10,000.00		0.00
08/21/2012	R 01	JW	Transfer to Branch from 002/01	TBR	000000	10,000.00		10,000.00
08/21/2012	R 01	JW	Transfer Bank to 998/02	TBK	000000	-10,000.00		0.00
08/21/2012	R 02	JW	Transfer Bank from 998/01	TBK	000000	10,000.00		10,000.00
08/21/2012	R 02	JW	Transfer Bank to 998/01	TBK	000000	-10,000.00		0.00
08/21/2012	R 01	JW	Transfer Bank from 998/02	TBK	000000	10,000.00		10,000.00

Widgets are being introduced in Impact/SQL version 8.0. Modules will have different widgets available to them. The idea is to take common functions and allow for them to be constantly available to the user, right from the desktop. Escrow users have widgets for Open Orders, the Held Items Queue and Ticklers. Widgets are managed via the icons in the lower right of the 8.0 Impact Escrow desktop. Note: the Report Scheduler is not yet available, as the Service for it has not yet been fully tested.

Impact/SQL Escrow [USA Digital Solutions Demonstration System]

File Edit Ticklers Disburse Wires Receipts Documents Projects Reports Misc. Naf Options Tools About

Held Items Queue

Filter By Bank: 01 - 1st National Bank of Nevada [708246798]

File Number	Receipt Number	Amount
00000001	00000000001013	1,000.00
00000215	00000000001061	500.00
KT2	00000000001064	250.00
KT2	00000000001065	330.00

Open Orders

Number	Open Date	Est. Close Date	Processor	Escrow Officer
00000006	08/13/2008	07/21/2009	Diane Speedy	Sherri Lamb - DSI
00000007	08/19/2008	07/21/2009		Sherri Lamb - DSI
00000008	08/20/2008			Sherri Lamb - DSI
00000009	08/20/2008	12/15/2009		Sherri Lamb - DSI
00000010	08/20/2008			Sherri Lamb - DSI
00000011	08/20/2008	11/11/2009		Sherri Lamb - DSI
00000012	08/04/2008	09/30/2008		Sherri Lamb - DSI
00000013	08/10/2008	08/21/2008		Sherri Lamb - DSI

Tickler Reminders

Filter: Pending Only

- Groups
- Sherri Lamb - DSI

Impact Widget Dashboard

- Held Items Queue
- Open Orders
- Report Schedules
- Ticklers Reminders

Ready | Sherri Lamb - DSI | 10/25/2012

Some other points of interest to Escrow users are presented below.

There is a new, static location for the Save & Exit, Print, Previous, Jump and Next buttons at the top of the data entry screens. A Title Search button was added to the Initial Question screens to prompt for ordering of the title search. There are now IRS Reportable and Exchange data fields incorporated into the Dates/Transaction information screen, to speed data entry. Mandatory fields will present with lime green backgrounds. The Jump menu will let the user go to and from the HUD and Initial Questions.

The screenshot shows the 'HUD with GFE Entry [SLRESG02] - Dates / Transaction Information' screen. At the top, there is a navigation bar with buttons for 'Save & Exit', 'Print', 'Title Search', 'Previous', 'Jump', and 'Next'. The main form area contains the following fields:

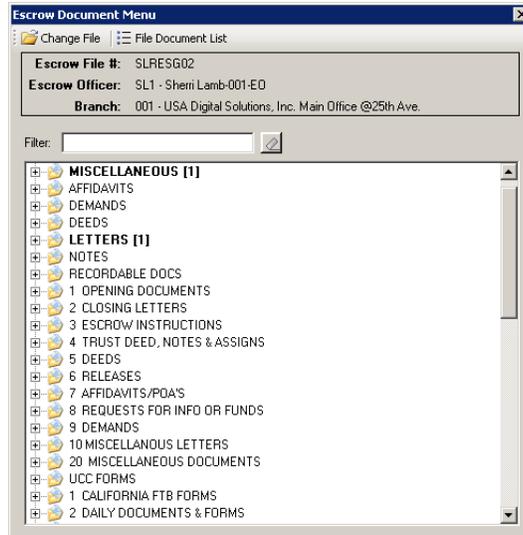
- Order Type: Escrow & Title
- Type of Closing: HUD with GFE
- Escrow Officer: SL1 - Sherri Lamb-001-E0
- Title Officer: SLT - Sherri Lamb-OD
- Processor: AAB - Steve Smith
- Marketing Rep: 01 - House Account
- Marketing Rep #2: 00 - None (Percent:)
- Marketing Rep #3: 00 - None (Percent:)
- Marketing Rep #4: 00 - None (Percent:)
- Date Opened: 06/18/2012
- Close of Escrow Date: 12/11/2012
- Proration Date: 12/11/2012
- Funding Date: 12/11/2012
- Contract Date: 06/01/2012
- Contract Number:
- Project Name:
- Disburse Date: 12/11/2012
- Type of Transaction: RP - Residential Purchase (IRS Reportable checked, Exchange unchecked)
- Underwriter: 1 - Fidelity National Title Insurance Company
- Premium Rate: 03 - Owner's Policy, Lender's Policy
- Sales Price: 431,000.00
- Initial Deposit:
- Funds Held by Broker:
- Funds Held By:
- Estimated Fee Information: Title: , Escrow:

There is a new arrangement of the Title Information screen.

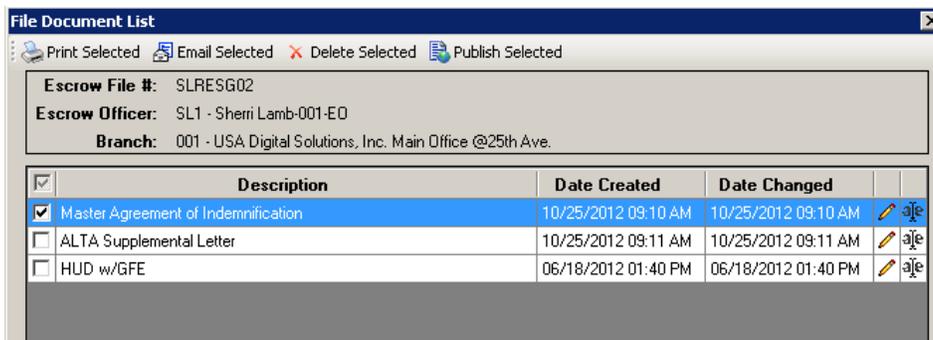
The screenshot shows the 'HUD with GFE Entry [SLRESG02] - Title Information' screen. At the top, there is a navigation bar with buttons for 'Save & Exit', 'Print', 'Title Search', 'Previous', 'Jump', and 'Next'. The main form area contains the following sections:

- Information:
 - Status:
 - Base Order No:
 - Subject To:
 - Need By Date:
 - Reference Number 1:
 - Reference Number 2:
 - Requirements (List in order):
 - (1)
 - (2)
 - (3)
 - (4)
 - Comments to Title:
- Title Company Information:
 - Name: Outside Title Company
 - Address #1: 1455 N. Hayden Road
 - Address #2: Suite 3356
 - City, State and Zip: Phoenix, AZ 85124
 - Title Officer: None
 - Phone Number:
 - Fax Number:
 - Email: DTC@OutsideTitle.com

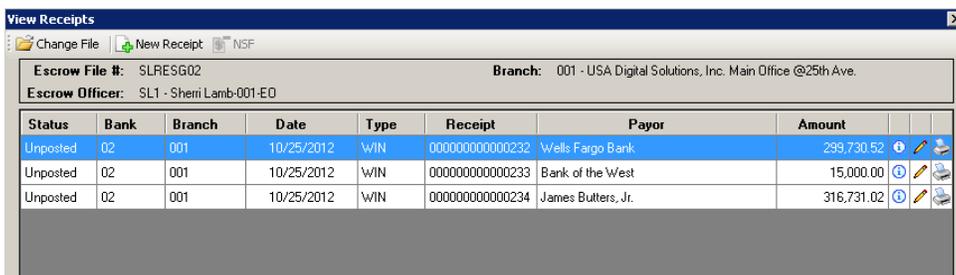
The Documents Menu format has been updated into a tree-view. The File Document List button has been moved to the top of the screen. If documents have been selected from a category, for the file involved, that fact is indicated by the section name displaying in bold and the number of documents created is identified after the section name. The “Plus” box in front of the section name can be used to expand the section to see the documents within it.



The File Document List display has been updated to a grid format with new function icons for Printing, Emailing, deleting and publishing (if so configured).



The Receipts screen has been modified to provide for both the viewing of existing receipts and be used to add new ones, with the New Receipt icon located at the top of the screen.



The HUD Print screen has been updated, but has the same functionality.

The Disbursements screen has been updated, but has the same functionality. There are icons on each grid line for actions addressing each item.

Status	Payee	Amount
Skip	BANK OF AMERICA (ABA)	194,217.60
Skip	BANK OF THE WESTERN STATES	1,588.94
Skip	STATE FARM INSURANCE	778.00
Skip	THE NEW COMPANY, INC.	430,064.51
Skip	USA DIGITAL SOLUTIONS, INC.	1,407.00

The Receipts screen accessed from the Disbursements screen is shown below.

Bank	Branch	Date	Type	Receipt	Payor	Amount
U 02	001	10/25/2012	WIN	000232	Wells Fargo Bank	296,730.52
U 02	001	10/25/2012	WIN	000233	Bank of the West	15,000.00
U 02	001	10/25/2012	WIN	000234	James Butters, Jr.	316,325.53

Questions and comments should be directed to Support@Digisolaz.com.
Support can be called at (602) 866-8199 x 2.