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What's New in ImpactSQL 7.8 build (046)

This document outlines new and updated features introduced in the Impact/SQL version 7.8, build (046) maintenance release. Enhancements and modifications are discussed, below, in the module section they are applicable to.

For additional documentation about DSI's software, visit the documentation page of our website at: www.digisolaz.com/docs/documentation.htm. Earlier "What's New" publications are posted there.

Please contact us if you have any questions or comments – the Support line is 602-866-8199 x 2.

Escrow

- 1) For systems with document publishing integrations, the Publish button has been added to the Wire In and Wire Out History screens. (SRS 27242)
- 2) In Impact databases on versions 7.6, 7.7 & 7.8, on the 1200 series screen, if data was entered in the Seller Amount field it would not push into the HUD columns unless there was data entered in the Buyer Amount OR the GFE field. Failure to push into the column resulted in the seller amount's absence from calculations, resulting in a Debit Column Error when generating a Settlement Statement, but no error when producing the HUD, even though the figures were off as the fee was not being included in the total. This has been corrected. (SRS 26836)

- 3) The Balance Statement would not show a zero balance, on a GFE file, when the line 803 detail screen was used with the withholding of fees. The Statement would reflect the adjusted origination charges as a deduction even though it has been withheld from the lender's funds. This resulted in a shortage totaling the amount of the adjusted origination charge. If the detail screen was NOT used, and the line 801 WTH box was checked, the Balance Statement was correct and did not show the adjusted origination charge as a deduction. This has been corrected and the detail screen works properly now. (SRS 27086)
- 4) In version 7.8 (033), on non-GFE files, lines 701 & 702 would delete the zip code upon leaving that field. If the NAF were used to populate the field, and the user never gave the field the focus (tabbed into it or clicked on it), the zip code would remain. This has been fixed and the zip code can be entered manually and will be retained upon exiting the field. (SRS 27236)
- 5) Changing the "role" on an established "Contact" on a Lender party entry was resulting in an "unhandled exception error". This has been addressed and the role can now be changed successfully. (SRS 27368)
- 6) In the HUD 1000 section, the number of months was not able to be removed upon the deletion of the number of months. The number was reverting to zero ("0") even when the per month amount was removed. The number of months will now reflect a zero, however if the per month amount is blank, the zero will be removed from the number of months field upon exiting the screen. (SRS 27372)
- 7) Blank seller or buyer entries, used with custom signatures only on them, were, depending on number, triggering a HUD reference to additional parties and were resulting in a blank buyer/seller addendum page. This has been fixed so the custom signature technique works properly without producing a blank addendum. (SRS 27374)
- 8) The agent commissions edit screen was truncating agent email addresses at 30 characters, rather than the permitted 100 characters, on the agent party entry screen. This has been corrected; 100 characters will be accepted on both screens. (SRS 27278)
- 9) In Impact versions 7.6, 7.7 & 7.8, when County Transfer Tax entries, for the calculator, were set to default the charge to the Buyer for a county, and the calculator was used and then the user altered the charge to be paid by the seller, all was OK unless the calculator screen was re-entered – at that point the charge was altered in error. This has been corrected and now when re-entering the calculator screen, the amounts and charged party(ies) remain the same. (SRS 27428)

- 10) An “index out of range” error was being received when a user tried to print a document from the list of documents, when the document used Mobile Home fields and the document contained fields for Unit 4. The document would print and email correctly from within Word, but not from the list of documents. An additional issue involved transposition of unit 4 data for unit 3 data when the document did not contain fields for unit 4. These matters have been addressed. (SRS 27470)
- 11) The absence of an Escrow Company entry (in Other Party #1), on databases with the new sub-escrow functionality (from Impact 7.7) turned on, will result in no disbursement being prepared for the escrow company when doing disbursements from the Sub-Escrow menu. This scenario was generating an error, in addition to the absence of the disbursement. That has been corrected, so no error is received, but the absence of the payee will still result in no disbursement. (SRS 27477)
- 12) Printing the standard report from the Miscellaneous Data Entry screen was producing a report of all entries for all files, not just the selected file. This has been corrected and the report will only reflect the selected file’s data. (SRS 27489)
- 13) A manual entry to the description line on HUD line 104, on a non-GFE residential file, was not being retained. This has been corrected. (SRS 27502)

Title

- 1) A new section is available to be used on the prelim/commitment master documents, and subdivision master documents, called “Notes”. In order to use the new “Notes”, the master document must be modified to include the bookmark and style called “Notes”. In addition, the numbering style should be set via the Tools, Document Variables menu, if a numbering style other than numeric is needed. Items in the “Notes” section will not be copied when creating policies; they will be copied when use the Copy Base files and Subdivision features. (SRS 27505)
- 2) The prelim and policy will now store the title clause that was inserted into the document in a PRIVATE field, so the information is available for the Property Insight starter export. The code is stored for codes entered by the user and for codes inserted via the NextAce import button.

The PRIVATE field code should only be visible when paragraph markers are turned on. If they are visible, then check the Tools Options and uncheck Hidden fields.

For user inserted codes, the format of the field is {PRIVATE TCU xx \ *MERGEFORMAT}, where “xx” is the title code that was inserted. The PRIVATE field should be after any item numbering.

For codes inserted via the NextAce Import button, the format of the field is {PRIVATE TCN xx \ *MERGEFORMAT}, where “xx” is the title code that was inserted. The PRIVATE field should be after any item numbering. (SRS 26958)

- 3) A Setup Option (Utilities, System Files) has been added to allow the system to be configured to automatically include or exclude the Exceptions, from the prelim/commitment, into a policy. (SRS 27679)
- 4) For sites configured to import NextAce data, the functionality has been changed when the NextAce import button is clicked so that if clauses have already been entered, in the Exceptions and/or Requirements sections, the user will be prompted to confirm that they wish to import NextAce data. An affirmative response will be required to bring in the data which will wipe out the existing entries. (SRS 27141)
- 5) In the new Title Charges functionality, when emailing the Billing Statement &/or Sub Escrow Instructions, the attachment name has been changed as follows:
 - a. If both options are checked, the attachment is named “Billing Statement and Sub Escrow Instructions”.
 - b. If only Billing Statement is checked, the attachment is named “Billing Statement”.
 - c. If only the Sub Escrow Instructions is checked, the attachment is named “Sub Escrow Instructions”. (SRS 27370)
- 6) An escrow lock was being left in place after a user in the Title module accessed the conversation log from the menu, without opening the file itself, and made an entry and cancelled out of the screen. The file could be opened thereafter in Title, but not in Escrow. This has been corrected and no locks are left in place now. (SRS 27033)
- 7) Hitting the F12 key, to bring up the listing of all fax numbers in a file, when editing documents in Title, was generating an error when used in the Legal Description. This has been corrected. (SRS 27064)
- 8) In order to match the system-wide default setting of “No” on delete confirmation prompts, the default setting was switched from “Yes” to “No” on the delete prelim confirmation prompt. (SRS 27301)

- 9) A user in the Title module, on the Title Charges screen, clicking on the Printer icon and selecting Settlement Statement, was generating a file lock that was not being released no matter what was done afterwards. Others could not subsequently get into the file. This has been corrected and no lock is left in place. (SRS 27357)
- 10) When a system was configured for Title File Numbering and the user accesses the Endorsements via a title file number, they were receiving a "File Could Not Be Found" message. This has been corrected. (SRS 27394)
- 11) Using the Title File Number, in the Title module, to try to print a prelim/commitment was resulting in a message that the prelim did not exist, on an Escrow file, or a run-time 13 "type mis-match" error on a Direct Order. This has been corrected and a title file number can be used. (SRS 27475)
- 12) When a user added endorsements to the policy details screen and then edited the policy, the endorsements were added to the policy. If the user added endorsements to the policy details screen but then exited the screen before editing the policy, then returned to the screen to edit the policy, the endorsements were being flagged as not being new, in the endorsements table, and were not being added to the policy when edited. This has been corrected and the endorsements will be added to the policy. (SRS 27537)
- 13) When an endorsement was created on a miscellaneous file, the underwriter chosen on the endorsement selection screen would pull through to the document. This was broken sometime after version 7.5.4. It has been repaired and functions as it has historically. (SRS 27551)
- 14) When a policy master document was set up to use the Vested bookmark/style, when the policy is built from the prelim, the prelim's vesting is being pulled into the policies vested bookmark, which was not correct. The prelim's vesting should not have been pulled into the policy. This has been corrected. (SRS 27571)
- 15) Policy descriptions, entered on the prelim entry screen, were not flowing to the prelim on Commercial files, but only in the instance where a system was configured with only one underwriter. This has been corrected. (SRS 27610)

Accounting

- 1) A new reconciliation filter has been added to support the Summit State Bank format. (SRS 27526)
- 2) Emailing a copy of a wire out request from the pending wire out listing (not the approval email) resulted in the subject line of the email reflecting the file information from the last wire on the list of pending wires, rather than the wire involved. This has been corrected. (SRS 27333)
- 3) Editing an existing savings account was resulting in the user receiving a runtime error ("multi-step operation") and the modifications were not being saved. This has been corrected, so editing works properly. (SRS 27562)
- 4) (Applicable to FNF CRRAR-configured sites only) For sites configured for CRRAR, with the Dual Send option turned on, there was a problem with the Dual Send report only reflecting both the fees submitted and the invoice data if the fee slip was issued first. This problem has been resolved and the report will now reflect all activity properly. (SRS 27183)

All

- 1) The Batch Processor's dormant lock function has been changed so that when a file is unlocked it will be automatically re-locked within 10 days if not fully disbursed. (SRS 27481)
- 2) Historically, when Impact has been run under Citrix, the listing of printers presented to the user included printers that the user did not have permission to use. The listing of printers will now only reflect those that the user has defined in their Windows environment. (SRS 27496)
- 3) Compatibility with Office 2007 & 2010 is being introduced in this release as we have received an update to the 3rd party component utilized by ImpactSQL to work with Office 2003, 2007 and 2010. This update will maintain compatibility with Office 2003 for those clients who will not be changing to Office 2007 or 2010.

For those clients that wish to utilize Office 2007 or Office 2010, ImpactSQL will allow for the migration from Office 2003 to Office 2007 or Office 2010 by allowing the system to be configured to maintain the documents in Office 2003 format, via a Setup Option, until such time as all workstations/servers have Office 2007 or Office 2010 installed. (SRS #25319)

- 4) When emailing, printing or publishing a document which had a title containing a quotation mark (“), an “illegal characters in path” error was being received and the emailing, printing or publishing failed. This has been resolved and quotations may now be used in document titles. (SRS 27553)
- 5) Changing the category Type, on a NAF entry, could return a run-time error (“multi-step operation generated errors, check status value”) on an encrypted database. On unencrypted databases, no error was being generated, but if the items being changed contained a Branch level entry, with an Individual entry under the Branch, the Type was not being changed to match its parent. These matters have been addressed and changing Type will now flow down the tree from the Parent properly. (SRS 27637)
- 6) The use of an Include Text statement, in an escrow clause, was resulting in an error #4198 being received when trying to generate the Codebook, and the Codebook failed to complete. This has been rectified, and the Codebook generation is no longer affected by Include Text statements. (SRS 24866)
- 7) An issue related to emailing a document from the escrow or miscellaneous title docs lists resulting in an “error occurred in PerformAction” message was found to be the result of a linked CREATEDATE field (normally unlinked when a document is first opened, but not if in a header or footer). This matter has been resolved. (SRS 27436)
- 8) The use of the Insert Addressee feature, in documents, was resulting in a soft return followed by a hard return when a single address was selected, but only a hard return after each address when using the group feature. This change makes both grouped and non-group entries each have a hard return at the end of each line. (SRS 27499)

Order Desk

- 1) An apostrophe in the property address was triggering a run-time error “syntax error or access violation”. This has been corrected. (SRS 27030)
- 2) A workflow path was resulting in Order Desk locks being left in place on files that were not submitted to title at origination in Order Desk, so they could not be submitted later from Escrow. This has been corrected. (SRS 27352)

Utilities

- 1) A function lock was not being set when the Setup Options were being edited, so the system was not preventing two users from editing the Setup Options at the same time. This has been resolved. (SRS 27442)
- 2) The Password report will now show the phone and fax numbers of the users. (SRS 27504)
- 3) The Password report will now reflect the “System Name” field in the title, to help distinguish which database the report is from – as there are several databases with the same “Company Name”. (SRS 27234)

Sub Escrow (the new 7.7 version)

- 1) The Title Charges screen has been cleaned up a bit and a sub-total has been added that splits Payoffs from Title, Recording and Additional Charges. (SRS 27493)
- 2) Keyboard shortcuts have been added in the new sub escrow title charges screen:
 - i. Ctrl-T for Title Charges
 - ii. Ctrl-R for Recording Charges
 - iii. Ctrl-A for Additional Charges
 - iv. Ctrl-B for Buyer Payoffs
 - v. Ctrl-S for Seller Payoffs(SRS 27490)