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What's New in Impact/SQL 8.4 build (15)

This document outlines new and updated features introduced in the Impact/SQL version 8.4, build (15) 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 DSI if you have any questions or comments – the Support line is 602-866-8199 x 2.

Escrow

1) There is now the ability to print a breakdown of the HUD line 1102 items that have a Seller Amount or where the POC is Paid by Seller. A print option has been added to the Print HUD with GFEC screen, when the HUD Selection is Combined or Seller. (SRS 31146)

2) There are times that certain buyers' names have been entered into the file whose names should not appear on the HUD as they are not considered Qualified Buyers. A flag has been added to the Buyer screen to indicate whether the buyer should be reflected on the HUD. The "Show on HUD" checkbox is used to indicate that the buyer's name should appear on the HUD; the checkbox is checked by default. This applies to Residential files only. (SRS 31151)

3) Currently when a NAF entry is pulled into the file under Parties, Contacts, Source of Business, Bill to Customer, Title Information, Documents and Payoffs, if the NAF entry is a branch or individual and the address information is empty the parents address information is used. This enhancement will also pull the Work Number, Work Extension and Fax Number from the parent if the NAF entry being used does not have the corresponding entry populated. (SRS 31157)

4) A Utilities module Setup Option has been added called "Set Disbursement Date on Issuance of Fees". If enabled, the option will fill the Disbursement Date (first screen of Initial Questions) with the date of the fee slip/fee check when issued. (SRS 31158)

5) It is now possible to add new "Roles" for use on the Contacts data entry screen. New "Role" types are added via the Utilities, User Tables, Contact Roles maintenance screen. (SRS 31241)

6) It is now possible to add new Party Types (such as HOA, Pest Inspection, etc.) to the system. The added Types will aggregate in the Other Party section of the Parties listings. A System Admin can add new Party Types. SmartTags can be used to access the additional party data in documents. (SRS 31242)

7) Sites that are configured for Dual Authorization of Disbursements (Checks) &/or Dual Authorization of Wires, may now identify, in the Users table, originators whose disbursements are excluded from being able to be approved by the specific user being edited. This control was added to accommodate some audit requirements that do not permit related signers to approve each other's disbursements. A drop box listing of all users' NT Logins and AD Names will be presented and those whose disbursements are not able to be approved by the user being edited can be so identified. Should a user be on one or more exclusion listings, their NT Login entry will not be able to be changed in User maintenance until they are removed from all exclusion listings. (SRS 31153)

8) A new permissions control has been added to the User setup screen that will provide the ability to designate per user whether or not they can do receipts and incoming wires. At update, all users in the affected access levels will be granted the permission, and a System Administrator will need to disable the option for those users the business wishes to restrict. (SRS 31327)

9) When Income Codes are categorized, those codes marked with the Title Fee Premium category and with None for the Liability From setting will now appear in the income code selections for HUD 1102, 1103 and 1104 (additional breakdown lines) on Residential files. (SRS 31373)

10) The Amortization function was locking up when the payment amount exactly matched the calculated interest. Since no term was being specified and the installment amount matched the calculated interest amount, the schedule should have presented the following dialog: "Excluding Odd Transactions, the interest accrued each period will match or exceed the installment amount. This makes the term length infinite. Calculate until Stop Date applying deficit interest to balance due?". This problem has been corrected and the dialog is now properly presented. (SRS 31394)

11) A workflow path existed that let users change the bank on zero balance files when there was an outstanding pending wire out for the current bank. This resulted in improper booking of the wire out on the ledger when it was approved. This matter has been corrected and users will not be able to change the bank on a zero balance file if there are pending wires out. (SRS 31412)

12) The Incoming Wire Detail (Information) screen was improperly reflecting the account number for the escrow trust account to which the funds were being directed instead of the customer's account number from which the funds were being received. This has been corrected and the Incoming Wire Detail screen now properly presents the customer's account number in the Sending Bank information section. (SRS 31521)

13) When emailing an Excel document using the "Default" type (not PDF) the attachment which was created retained the Impact/SQL DDE field links, resulting in an error when the email recipient opened the attachment. This has been corrected and the links are no longer being retained. This only applies to sites that are configured to allow email attachments in default format. (SRS 31530)

Escrow – Commercial Files

1) The order in which multiple properties were being presented on fractionalized settlement statements was not always matching the order of the properties in the file. This matter has been resolved and properties will now appear in the same order as they are presented in the file. (SRS 31319)

2) When Income Codes are categorized, those codes marked with the Title Fee Premium category and with None for the Liability From setting will now appear in Title Charges income code selection listing, when the charge Type is Title Charges, on Commercial files. They will not appear if the Type is Owner's or Lender's Policies. (SRS 31373)

Escrow & Title

1) The original pre-bill number is now retained when a pre-bill is switched to an invoice. The original pre-bill number can be searched for after the switch to an invoice. (SRS 28184)

2) An "Attention To:" field has been added to the Contacts data entry screen. (SRS 31145)

3) A File History log entry is now made every time the Full Legal Description is accessed for both Escrow and Direct Order files. (SRS 31148)

4) The Escrow and Title Documents menu maintenance routine was failing to back-fill unused form numbers and was just using the next higher number…reaching the 999 limit pre-maturely, resulting in an error message of "String or binary data would be truncated. The statement has been terminated." This has been corrected and unused lower form numbers are assigned before numbers are added at the end of the sequence. (SRS 31513)

5) A new setup option has been added to the Title Instructions to send the marketing reps on the file an email when the order has been submitted to title. Optionally the email can include a copy of the order sheet (Title Instructions). (SRS 31147)

Title

1) The Copy Entire Prelim option, in the Copy Base Files function, will now include Notes and the Map. The Notes must be properly styled and bookmarked. The Prelim master document must be set up to include maps ([* Insert Map Here] entry, styled and bookmarked as Map); generally utilized in NextAce environments. (SRS 31149)

2) Currently, when the Prelim/Commitment master document has been configured to include the MAP, typically done for the NextAce integration, when the policies are created the MAP is not copied over. This enhancement will allow the system to copy the MAP from the Prelim to the Policy when the Policy Master is set up to do so. (SRS 31154)

3) An unexpected limit of 2,000 title clauses was resulting in the inability to browse title clauses. This limitation has been removed. (SRS 31155)

4) The printing of title instructions from the Misc > Reprint Title Instructions menu, in Title, was improperly changing the Accepted Date on amended orders to the current date, rather than leaving it as the date the file was first ordered. This erroneous behavior has been stopped. (SRS 31256)

5) The DDE field for the escrow officer's fax number was improperly pulling in the Branch Phone Number, rather than the Branch Fax Number, when the EO had no fax number in the User table. This was affecting Title documents, prelims, policies and endorsements. The problem has been corrected and the Branch Fax Number will now be pulled if the EO is not configured with a fax number. (SRS 31305)

6) The General Options were not available for selection, when using the Copy Base Files function, for Direct Order files. This has been corrected. (SRS 31362)

7) When Income Codes are categorized, those codes marked with the Title Fee Premium category and with None for the Liability From setting will now appear in Title Charges income code selection listing, when the charge Type is Title Charges, in the Title Charges function. They will not appear if the Type is Owner's or Lender's Policies. (SRS 31373)

8) A problem linked to 2 digit form numbers, in the policy master document entry screen, was causing policy descriptions to not carry through to the prelim. This matter has been corrected and 2 digit form numbers are managed properly. (SRS 31397)

9) A problem existed in v8.0 and later, relating to the setting of file number ranges for Direct Orders – and prevented orders from being opened with automatic numbering after the numbering range was changed. This has been corrected. (SRS 31536).

10) The Impact Windows Service was improperly updating the original App_Printed date field when sending amended or cancelled order notices to Title. The prior Batch Processor did not do that. This has been corrected and the original App_Printed date is left alone. (SRS 31541)

11) The Examiner and Typists entry on the Prelim, Policy and Set Exam info screens has been modified to allow entry by typing the initials or selecting from a dropdown. On a go forward basis when entering the initials, the system will require that initials entered correspond to a user in Impact. (SRS 31144)

Accounting

1) A workflow path existed that let users change the bank on zero balance files when there was an outstanding pending wire out for the current bank. This resulted in improper booking of the wire out on the ledger when it was approved. This matter has been corrected and users will not be able to change the bank on a zero balance file if there are pending wires out. (SRS 31412)

2) For sites configured to issue receipt and wire out numbers by Branch, the system was only checking to see if the next number requested had been used by the Bank…not a combination of Branch and Bank…and was advancing the receipt number assigned improperly. This has been corrected and now the combination of Bank and Branch are checked for prior usage of numbering for receipts and wires out. (SRS 31417)

3) The Incoming Wire Detail (Information) screen was improperly reflecting the account number for the escrow trust account to which the funds were being directed instead of the customer's account number from which the funds were being received. This has been corrected and the Incoming Wire Detail screen now properly presents the customer's account number in the Sending Bank information section. (SRS 31521)

Utilities

1) The Setup Option, General Functions, Miscellaneous, "Enable Publish File in Order Desk Upon Acceptance" was removed from the screen, erroneously, in version 8.1 – it has been returned to the listing. (SRS 30948)

2) The NT Login is now a filter search option in Utilities, System Files, Users. (SRS 31150)

3) Sites that are configured for Dual Authorization of Disbursements (Checks) &/or Dual Authorization of Wires, may now identify, in the Users table, originators whose disbursements are excluded from being able to be approved by the specific user being edited. A drop box listing of all users' NT Logins and AD Names will be presented and those whose disbursements are not able to be approved by the user being edited can be so identified. Should a user be on one or more exclusion listings, their NT Login entry will not be able to be changed in User maintenance until they are removed from all exclusion listings. (SRS 31153)

4) A Utilities module Setup Option has been added called "Set Disbursement Date on Issuance of Fees". If enabled, the option will fill the Disbursement Date (first screen of Initial Questions) with the date of the fee slip/fee check when issued. The Setup Option is on the Escrow, Disbursements screen. (SRS 31158)

5) It is now possible to add new "Roles" for use on the Contacts data entry screen. New "Role" types are added via the Utilities, User Tables, Contact Roles maintenance screen. (SRS 31241)

6) It is now possible to add new Party Types (such as HOA, Pest Inspection, etc.) to the system. The added Types will aggregate in the Other Party section of the Parties listings. A System Admin can add new Party Types, in Utilities, User Files, Party Types table maintenance. The Description of a new Party Type can be up to 50 characters in length. Once used, a Party Type cannot be deleted from the Party Types table. (SRS 31242)

7) A new permissions control has been added to the User setup screen that will provide the ability to designate per user whether or not they can do receipts and incoming wires. At update, all users in the affected access levels will be granted the permission, and a System Administrator will need to disable the option for those users the business wishes to restrict. The addition permission control is labeled "Add/Modify Receipts and Incoming Wires". (SRS 31327)

8) The Invoice Description table maintenance routine was not letting entries with codes of more than 3 digits be deleted. The routine has been corrected and now handles 4 & 5 digit codes properly. (SRS 31399)

9) A Utilities module Setup Option has been added to the General; Title Instructions options to send the marketing reps on the file an email when the order has been submitted to title. And to optionally include a copy of the order sheet (Title Instructions) (SRS 31147)

Order Desk

1) The "Extension" data field, tied to the "Work Phone Number" field, was missing from all of the Party data entry screens in the Order Desk module. It has been added to each party type data entry screen. (SRS 31156)

Recon Tracking

1) The Recon Tracking module was not checking for proper SQL table existence before opening, and threw an error as a result. This has been corrected and if a site is not configured for use of the module, it will not attempt to open. (SRS 31441)