



Title Report V14.79.0 Changes

**Application Details, Invoice, and associated
document position flexibility**

Revised: 7/14/2020

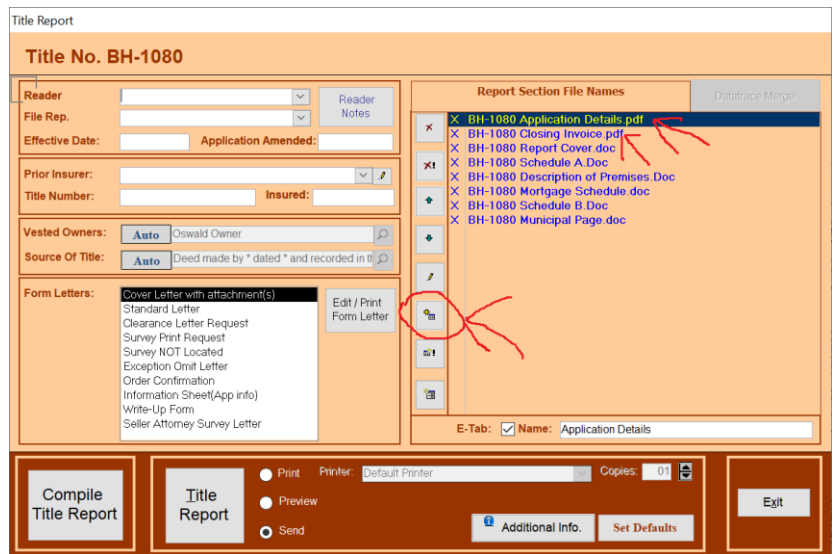
Summary

We have made some improvements to how a Title Report is compiled, specifically related to the inclusion of the Application Details, Invoice, and associated documents. Previously these documents could be included automatically only if they were to appear at the very front of the Title Report. As of TrackerPro V14.79.0 they can be automatically included anywhere within the Title Report.

Transition

If you want TrackerPro to continue to behave as it always has, you do not need to do anything different. You will notice that when Compile a Title Report you will see the Application Detail and other documents appearing at the top of the Report Sections automatically, based on how your preferences were previously set.

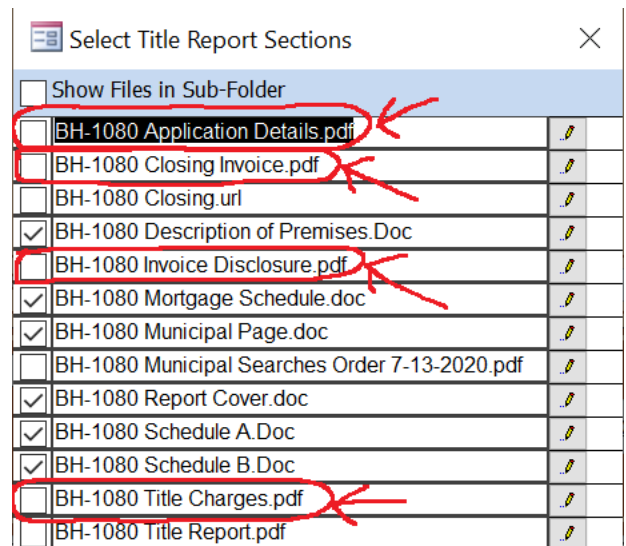
You can now use the buttons on the left side of the Report Sections to move or adjust the position of these sections, just like you would any other sections of the Title Report.



Notes

1) These documents will get updated automatically anytime the Title Report is printed/previewed/sent using the Title Report button. They will also get updated anytime you open them by double-clicking on the Report Section in the list. You will notice that these documents do appear in the File Cabinet. If you open them from the File Cabinet you will be viewing the last version that was created, they will not get updated.

2) These documents will ALWAYS appear in the Add Report Section screen. This allows you to always add these to any Title Report, even if they don't get automatically added or if you have removed them previously from a file. We refer to these as 'Ghost Entries' since, this window will typically show only files that exist in the File Cabinet, but these documents will always show, even if they don't actually exist in the file cabinet.



Configuration

The Underwriter Title Report Templates can be used to adjust which of these documents appear automatically, or where they appear automatically in the report. There is a new Section Type that will be used for these documents.

Edit Underwriter Details

Vendor Code:	ChicagoNY	State:	NY	Base Premium Split:	15.00%
Company Name:	Chicago Title Insurance Company			Agency Remit Code:	
Name Line 2:				Title Number Prefix:	
Address Line 1:				Owners Policy Prefix:	
Address Line 2:				Loan Policy Prefix:	
Address Line 3:				\$25 Policy Split:	<input type="checkbox"/>
Phone Number:				* Required Fields	
Fax Number:				Endorsement Splits and Templates	
E-Mail Address:					
Rate Calc URL:					
Select the Bank Accounts to hold liability funds:					
Clearing:	Default for this Controlled Liability				
Escrow:	Default for this Controlled Liability				
Recording Tax:	Default for this Controlled Liability				
Recording Fees:	Default for this Controlled Liability				
Remittance:	Default for this Controlled Liability				
Settlement:	Default for this Controlled Liability				

New Delete End **Title Report Templates** Cancel Save Exit

Edit Sections to the Title Insurance Commitment for the Underwriter shown below

Chicago Title Insurance Company - NY

App Info	Application Details.pdf	Section Type:
<input type="checkbox"/> Estimated Invoice	Title Charges.pdf	<input type="radio"/> Regular
<input type="checkbox"/> Report Cover	Cover Chicago Title.doc	<input type="radio"/> Exceptions
<input type="checkbox"/> Schedule A	ScheduleA.Doc	<input type="radio"/> Description
<input type="checkbox"/> Mortgage Schedule	MortgageSchedule.doc	<input type="radio"/> Municipals
<input type="checkbox"/> Description of Premises	Description of Premises.Doc	<input type="radio"/> DirectWeb Document
<input type="checkbox"/> Schedule B	ScheduleB.Doc	<input type="radio"/> Live Templates
<input type="checkbox"/> Municipal Page	MunicipalPage.doc	<input checked="" type="radio"/> AppInfo/Inv Disclosure/Estimated Inv/Closing Inv

Select Exceptions or Description if the document might have exceptions or description of premises to be included in the title policy. Otherwise select Regular or Municipals as appropriate.

DirectWeb Document (Live Templates) is for Vendor Searches coming back through DirectWeb

AppInfo/Inv Disclosure/Estimated Inv/Closing Inv is for additional files you want to include in your title report.

File To Include: Application Details.pdf

Section Name: App Info

Instructions

Buttons: Remove Section; Move Section Up; Move Section Down; Edit Section Document; Add New Section

Exit