SoftPro Administrator User Guide

SoftPro Select 4.0 | Friday, July 31, 2015

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SoftPro Select Overview

SoftPro Select is the most complete office solution for the real estate and title industries. See what you can do with SoftPro Select and inquire today about switching to Select from SoftPro Standard/Enterprise Editions.

The SoftPro Select family of products offer solutions at each level of your needs:

PROFORM

ProForm is the leader in title insurance order and closing automation. Enter order data to produce professional closing and title insurance forms. Manage order tasks and run reports to track your business. Customize screens for your workflow.

PROTRUST

ProTrust is the choice for trust account management and reconciliation. Works seamlessly with your ProForm data. Print daily and monthly reports according to your criteria.

PRO1099

With Pro1099, your 1099-S filing is now automated. Pro1099 will produce your yearly IRS 1099-S submission file using the data you enter once in ProForm.

SPIMAGE

SPImage enables you to scan documents and associate them with your ProForm orders — making it easy to view images, archive complete files and retrieve when needed.

SPADMIN

SPAdmin is the security module of SoftPro .NET. With it, you manage SoftPro users and their permissions, adjust global program preferences, and create Lookup tables.

Resources

Online

- SoftPro Select on the Internet: www.softprocorp.com
- mySoftPro login: www.softprocorp.com/mySoftPro/mySoftProLogin.asp
- Register with mySoftPro to access the support knowledge base, document downloads, and more.

Support

- SoftPro Solution Center
- **(800) 848-0143**
- Monday to Friday from 8:00 A.M. to 5:30 P.M. EST
- Platinum-level support hours: Monday to Friday from 8:00 A.M. to 10:00 P.M. EST, Saturday 11:00 A.M. to 2:00 P.M. EST

Sales

- Call your SoftPro representative to register for platinum support service or inquire about products
- SoftPro Select Sales
- **(800) 848-0143**
- Monday to Friday from 8:30 A.M. to 5:30 P.M. EST
- sales@softprocorp.com

SPAdmin

Use SPAdmin to control SoftPro Select security and other global settings.

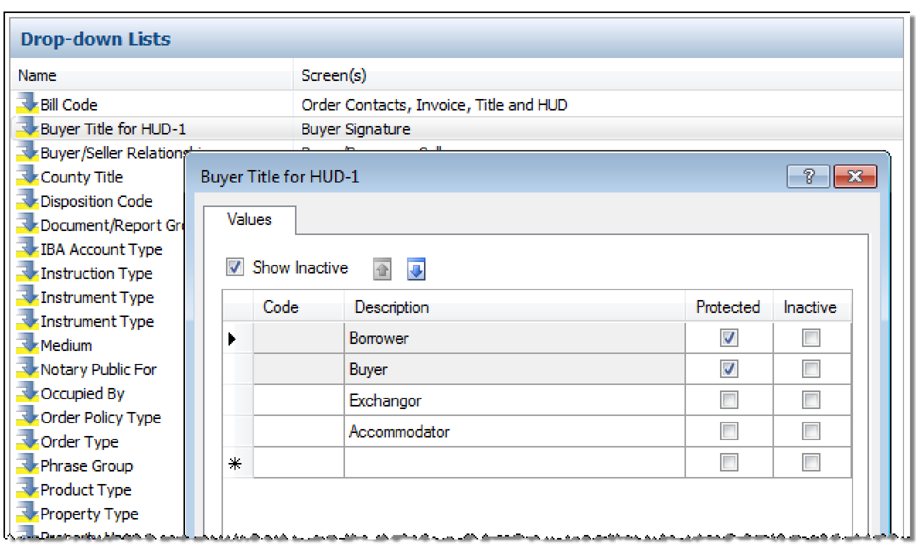
What you can do with SPAdmin:

- Define users and groups.
- Define organizational profiles.
- Define roles.
- Assign permissions.
- Create and edit Lookup tables.
- Set up an order numbering system.
- Add and edit Trust Account Codes.
- Edit global SoftPro Select preferences.
- Manage SoftPro Select licensing.

Note: Access SPAdmin by clicking the SPAdmin tab.

Drop-Down Lists

You can add, edit, delete, or resort values such as Bill Code, Business Type and Product Type in the Drop-Down List editor. The values are defined across the system, not per profile so as an administrator, you cannot create separate lists for each profile. The Protected checkbox indicates a SoftPro-created item and is not editable..

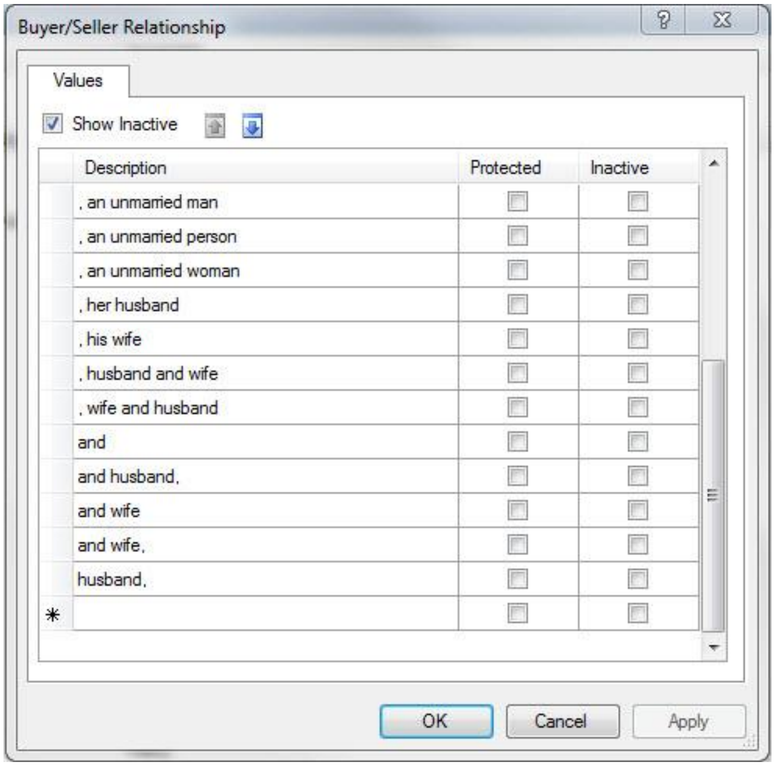


Accessing the Drop-Down List Editor

To access the editor, click the **SPAdmin** tab, then **Configuration**, then select the **General Settings** folder and **Drop-Down Lists**. The drop-down and value lists are sorted in alphabetical order. You must have administrative rights to view the Drop-Down List Editor.

Editing a List in the Configurations Screen

To edit a drop-down list, double-click on the desired list to bring up the values dialog:



Scroll to the end of the list to add new items in the new entry row indicated by the asterisk.

Use the up/down arrows to change the order the entries appear in the drop-down.

The Show Inactive checkbox, when checked, will show inactive items so that they may be reactivated, if desired.

Note: Entries marked as protected cannot be edited by users. Those marked inactive will be removed from the associated drop-down lists in the order.

Office Hours

Use the Office hours manager to set global ProTrust and ProForm dates and default settings. With the Office hours manager, Administrators can set a cutoff time after which transactions are posted with a trust accounting date of the next business day.

General Tab

Name (required): Enter the name of the office hours manager (text box, up to 100 characters).

Description: Enter a description of the office hours manager. This is not a required field.

Last modified on: This field defaults to the date the manager was created and is not editable.

Last modified by: This field defaults to the name of the user that created the manager and also is not editable.

Warn user if date is out of range by: This protects users against date errors in ProForm. If a user enters a date that is beyond the length of years specified here, an error message prompts them to correct the year entered. For example, 25 years is entered here and it is the year 2010, if a user enters a year earlier than 1985 or anything later than 2035, an error appears.

Start of business day: Enter a start time after which transactions are posted with a trust accounting date for that business day.

End of business day: Enter a cutoff time after which transactions are posted with a trust accounting date for the next business day.

Select **Saturday is a business day** and/or **Sunday is a business day** to count weekend days as official business days. **Note:** The start or end dates are used for time calculation (tasks, when due, transaction dates, holidays, etc.).

Enable these office hours: Check to enable the manager, leave unchecked to leave the manager disabled.

Holidays Tab

Enter or select office holidays in the **Holidays** grid. The grid lists holidays by the date and description. To add a holiday, scroll to the end of the list (in the grid) and enter a date or select it from the hours. Enter a description. Press the **down arrow** to move to a new, blank line. These dates are factored into the assignment of trust accounting dates for all posted transactions.

Profiles Tab

This tab allows administrators to assign or remove profiles associated with the Office hours manager. Only one Office Hours manager per profile is permitted. If the Administrator attempts to associate more than one manager with a profile, they receive a **Profile conflict found error** upon assigning the profile and are asked if they want to reassign the profiles to this office hours manager. Clicking **Yes** reassigns the profile to the new manager. Clicking **No** keeps the profile associated with the current office hours manager.

Trust Accounting Tab

Use system date and time: The trust accounting date defaults to the current date/time. This option is the default.

Use business days and cutoff time of: The trust accounting cutoff time field can be enabled so the user can set a time. New transactions added after the cutoff time are posted with a Trust Accounting Date of the following business day. (See the Business Day and Cutoff Time Logic detail for more information regarding this setting.)

Check Printing

The Check Printing Manager allows you to set up the checks required for each of your organization's trust accounts. The check printing manager allows you to perform the following functions:

- Add a trust account code (TAC) or check style
- Edit the association of the trust account or check style for the check printing manager or its properties, such as setting up the correct check numbering sequence
- Disable check printing managers associated with trust accounts

This information is linked to Profiles.

SoftPro Select “remembers” the last printer that was used to print checks, so you won't have to select a check printer each time you print checks. The check printer is remembered for each trust account.

Transaction forms will print to the default printer – the printer driver will no longer be displayed.

Adding a New Check Printing Manager

To add a Check Printing Manager, go to **SPAdmin**, click on **Configuration**, select the **Trust Accounting** folder from the list and right-click on the **Check Printing** folder. Select **New Check Printing Manager** from the dialog. The **Properties** dialog will appear.

General

Name: Enter the name of the check printing manager.

Description: Enter a brief description of the check printing manager.

Last modified On: This field defaults to the date the manager was created, and is not editable.

Last Modified By: This field defaults to the person name who created the manager, and also is not editable.

Trust account: Select the trust account to associate with the check printing manager.

Use auto check numbers: This option is checked by default. If unchecked, the user is able to manually edit the Beginning check number on the check selection dialog. Additionally, when this option is unchecked to allow for manual check numbering, the Next check number field is disabled on the Check printing manager.

Next check number: The default for this field is 0. The number will represent the last check number printed.

Reorder check number: A warning message will appear when the check number reaches the reorder number. The default for this field is 0. You may leave the default entry to not receive a reorder warning message.

Check document: Select the desired check document to print with the associated trust account.

Print check numbers: Select this option to have the check numbers print on the check document.

Horizontal adjustment: Enter inches in positive amounts to offset data to the right.

Vertical adjustment: Enter inches in positive amounts to offset data downwards.

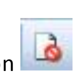
Profiles

This tab in the Properties dialog allows you to assign or remove profiles associated with the check printing manager.

Disabling a Check Printing Manager

If you do not want to use a particular check printing manager, set the check printing manager status to **Disabled** by right-clicking on the desired manager and selecting **Disable.** You will receive a confirmation dialog asking if you are you sure that you want to disable the manager. Click **Yes** to disable, **No** to cancel out of the request.

If you click **Yes**, you will receive a confirmation dialog asking you to remove all assigned profiles. If you choose to remove assigned profiles, users will not be able to view, add or edit any existing data related to the manager. Click **Yes** to remove the assigned profiles; click **No** to keep the profiles assigned to the disabled manager.

To restore a manager, click the **Show Disabled Items** button  to view the disabled managers. Right-click on the desired manager and select **Enable**. You will receive a confirmation message asking if you are sure you want to enable the manager. Click **Yes** to enable it, **No** to cancel out of the request. If you had removed associated profiles when initially disabling the manager, you will have to reassign profiles on the Profiles tab. Otherwise, if you selected not to have the associated profiles removed when disabling the manager, they will already be associated once enabled.

IBA Banks

An interest-bearing account (IBA) is any account that returns interest to the account holder, such as a money marked, CD or T-bill. IBAs are also known as investment accounts or savings accounts. If a settlement agent or escrow company holds client funds for a long period of time, the client can request that the money be placed into an IBA until needed for closing. The IBA Banks manager tracks these IBA account institutions. You can add, edit, disable, or copy financial institutions. You can also associate financial institutions with profiles to restrict which regions or branches view the financial institution.

General

Name: Required - Enter the name of the IBA bank manager (up to 100 characters).

Description: Enter a brief description of the IBA bank manager.

Last modified On: This field defaults to the date the manager was created, and is not editable.

Last Modified By: This field defaults to the person name who created the manager, and also is not editable.

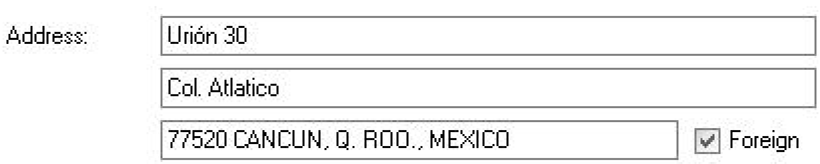
Address/City/State/Zip: Use these fields for the street address, city, state and ZIP code.

Foreign: Check to use an address format other than a standard United States address format (e.g. an address in Mexico). Checking this box changes the City, State and ZIP code fields to one text box to enter the information.

Foreign address (text box): Enter the foreign address. For example, if the address is:

Sra. Otilia Ramos Perez
Urión 30
Col. Atlatilco
77520 CANCUN, Q. ROO
MEXICO

Check the **Foreign** checkbox and enter the address as follows:



Routing number: Enter the routing number. A routing number is a nine-digit bank code, used in the United States, which appears on the bottom of negotiable instruments such as checks that identifies which financial institution it is drawn upon.

Enable this IBA Bank: Check the Enable checkbox to make the manager active, leave unchecked to keep the manager inactive.

Profiles

This tab in the Properties dialog allows you to assign or remove profiles associated with the IBA Bank manager.

Reference Numbering

In ProTrust ledgers, deposits, checks, transfers, incoming and outgoing wires, and receipts are each tracked separately. They are grouped together so that each type of instrument can be reconciled independently. The reference number manager sets up the auto-numbering feature. Users can:

- Turn auto-numbering on/off for receipts, incoming wires, outgoing wires, miscellaneous transactions, and funds transfers
- Enter in the next reference number for each type of transaction
- Set up a reference-numbering manager for each trust account

Adding a Trust Reference Numbering Manager

To add a Reference Numbering Manager, go to **SPAdmin**, click on **Configuration**, select the **Trust Accounting** folder from the list and click on the **Reference Numbering** item. Right-click in a blank area of the Reference Numbering screen and select **New Reference Numbering Manager** from the dialog. The **General Tab** dialog appears.

General

Name: Enter the reference numbering manager name.

Description: Enter a brief description of the reference numbering manager.

Last Modified On: Displays the date the reference numbering manager information was last changed.

Last Modified By: Displays the name of the user to last change the reference numbering manager information.

Trust Account: select the trust account from the drop-down list to associate with this manager.

Enable this manager for generating reference numbers: checking this box enables the reference numbering manager - this box is checked by default. Uncheck this box to disable the manager.

Numbering Managers

Transaction Type: Description of the activity listed. Transaction types include:

- CDF Transfer
- Check (Draft Auth Code)
- Group Deposit
- HUD Transfer
- Incoming Wire
- Interest Credit
- Ledger Transfer
- Miscellaneous Credit
- Miscellaneous Debit
- Outgoing Wire
- Receipt

Check (Draft Auth Code): Check this option to auto-number draft checks. When the **Draft** option is checked on the Check dialog, the authorization code field is auto-populated with the next available number shown in the reference numbering manager. The default is "checked".

Auto Number: Select **Auto Number** for any transaction type to turn on automatic numbering. For auto-numbered transactions, the next sequence number will be set to 100.

Next Sequence Number: Enter the next sequence number for each transaction type. The next sequence number will be the next number that is assigned to all new and posted transactions to the ProTrust database.

Make sure the next sequence number is higher than the highest reference number currently in the database. This will prevent duplicate numbers from occurring after auto numbering is activated.

Profiles

This tab allows users to assign or remove profiles associated with the reference numbering manager.

Disabling a Reference Numbering Manager

If Administrators need to make a reference number manager unavailable for association with profiles, they may set the status to Disabled by right-clicking on the desired manager and selecting **Disable**. A confirmation dialog appears asking for verification to disable the account. Click **Yes** to disable, **No** to cancel out of the request.

To restore a manager, click the **Show Disabled Items** button  to view the disabled accounts. Right-click on the desired account and select **Enable** or double-click on the Reference Numbering manager to activate or check the **Enable this manager for generating reference numbers checkbox** on the General Tab. A confirmation message appears asking for confirmation to enable the account. Click **Yes** to enable it, **No** to cancel out of the request. Profiles will have to be reassigned on the Profiles tab.

Trust Accounts Manager

Each trust account has its own unique trust account code. Trust account codes are essential to the proper organization of ledgers and transactions in the ProTrust database. This information will be linked to profiles. You may have more than one trust account code associated with a profile.

Adding a Trust Account Code

To add a Trust Account code, go to **SPAdmin**, click on **Configuration**, select the **General Settings** folder from the list and click on the **Trust Accounting** folder and the **Trust Accounts** item. Right-click in a blank area of the Trust Accounts screen and select **New Trust Account** from the dialog. The **New Trust Account Properties** dialog will appear.

General

Code: Enter the trust account code.

Description: Enter a brief description of the trust account.

Last Modified On: Displays the date the trust account information was last changed.

Last Modified By: Displays the name of the user to last change the trust account information.

Bank and Account Detail

Bank name: Enter the name of the bank to be associated with the ledger.

Bank address: Enter the street address of the bank.

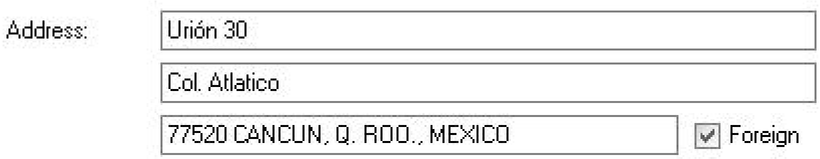
City/State/Zip: Enter the city, state and ZIP code for the bank.

Foreign: Check to use an address format other than a standard United States address format (e.g. an address in Mexico). Checking this box changes the City, State and ZIP code fields to one text box to enter the information.

Foreign address (text box): Enter the foreign address. For example, if the address is:

Sra. Otilia Ramos Perez
Urión 30
Col. Atlatilco
77520 CANCUN, Q. ROO
MEXICO

Check the **Foreign** checkbox and enter the address as follows:



Account number: Enter the account number from the above bank to be associated with the ledger.

Checking routing number/Deposit routing number/Wire routing number: Enter the routing number. A routing number is a nine-digit bank code, used in the United States, which appears on the bottom of negotiable instruments such as checks that identifies which financial institution it is drawn upon.

Fractional routing number: This field is used to accommodate checks that contain routing numbers printed as fractions. These numbers can be used for processing purposes if the magnetic printing is damaged. They are input one line by using a hyphen and a forward slash. For example, **11-24/1210** would correctly reflect either of these examples:

Default transaction date: This option sets the transaction date of all posted transactions to the date you select. Select one of the following from the drop-down list:

- **System date:** Transaction date set to the current system date. The current system date is automatically assigned by ProTrust to all posted transactions.
- **Settlement date:** Transaction date set to the settlement date in the corresponding file in ProForm.
- **Disbursement date:** Transaction date set to the disbursement date in the corresponding file in ProForm.

Deposit slip: If using electronic deposit slips, select the applicable type.

Ledger dormant after: Based on the number of inactive days that you have selected if there has been no activity, the ledger becomes dormant.

Order-related ledger dormancy based on: Select from two options in the Order-related ledger dormancy based on field:

1. Trust accounting dates (default): The latest trust accounting date of the transactions within a given ledger is used. This option applies to order-related ledgers and non-order-related ledgers.
2. Escrow open/closed dates: The Ledger dormant after field and the escrow open and escrow closed dates determine when the ledger is dormant. This option applies for order-related ledgers only since non-order-related ledgers do not have escrow open or escrow closed dates.

Auto-lock dormant ledgers: Check this preference to automatically lock a register when it becomes dormant. Once the ledger is locked, you can only unlock the ledger if you have permission.

Revenue Defaults

Payee name: Funds transferred to revenue ledgers are disbursed (paid) to this recipient.

Memo: Enter a brief memo. The memo appears on the check, on some reports and on transaction forms. **Note:** This field has a maximum of 255 characters.

Disburse revenue as: Select **Check, Outgoing Wire** or **Miscellaneous Debit** from the drop-down list to use as the default transaction type when disbursing transferred funds on revenue ledgers.

Wire to: this section is used when transferred funds on revenue ledgers are disbursed as an outgoing wire

Bank name: Enter the name of the bank to which the money is wired.

Account number: Enter the account number to which the money is wired.

Wire routing number: Enter the routing number of the bank to which the money is wired.

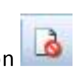
Assign Profiles

This tab in the Properties dialog allows you to assign or remove profiles associated with the trust account.

Disabling a Trust Account

If Administrators need to make a trust account unavailable for association with profiles, they may set the status to Disabled by right-clicking on the desired account and selecting **Disable**. A confirmation dialog will appear asking for verification to disable the account. Click **Yes** to disable, **No** to cancel out of the request.

Select **Yes** and a secondary confirmation dialog will appear asking to **Remove all assigned profiles**. If the option to remove assigned profiles is selected, users will not be able to view, add or edit any existing data related to the account. Click **Yes** to remove the assigned profiles; click **No** to keep the profiles assigned to the disabled account.

To restore a manager, click the **Show Disabled Items** button  to view the disabled accounts. Right-click on the desired account and select **Enable**. A confirmation message will appear asking for confirmation to enable the account. Click **Yes** to enable it, **No** to cancel out of the request. If Profile had been removed when initially disabling the account, they will have to be reassigned on the Profiles tab. Otherwise, the associated profiles were not removed when disabling the account, they will already be associated once enabled.

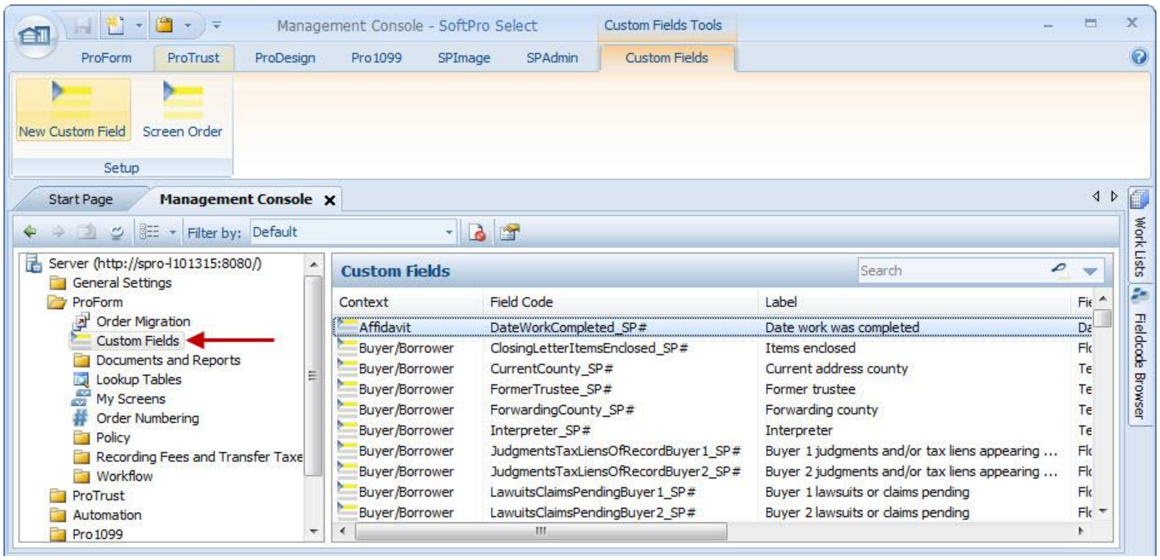
Custom Fields

With the Custom Fields manager, administrators can:

- Define a field, assigning it a label, field code, and data type

- Associate the field with a business object
- Automatically display the custom field on the business object's screen and inherit the object's permissions
- Place the field on a custom screen
- Associate a prompt with a field so users are presented with the current value for entry or confirmation at point of document preview

These fields are not based on a profile, but are used across ProForm. An administrator can limit custom fields through documents, custom screens, and permissions.



Accessing the Custom Fields Manager: From the SPAdmin tab, click Configuration, then Custom Fields under the ProForm folder. This opens the Custom Fields manager.

New Custom Field: This action icon will produce the new custom field dialog and allow users to assign the desired attributes to the custom field:

- **Context:** The Context field sets the framework or the perspective for the custom field. Select from options such as buyer, commitment, deed, etc.
- **Field code:** Allows the user to input a unique identifier for their custom field. This code would be used in generating documents or reports.
- **Label:** This is the on-screen text that will appear with the custom field to inform the user of the field's purpose.
- **Field type:** Select a field type such as checkbox, drop-down or ZIP code.
- **Drop-down values:** Select the options for a drop down-list.
- **Length:** Enter the maximum amount of allowed characters for the field.
- **Prompt:** Check if you want to prompt the user.
- **Hidden:** Checking this field removes the field from the screens. However, if the **Prompt** checkbox is checked, the field will remain visible when a document containing that field is rendered.
- **Protected:** The Protected checkbox indicates a SoftPro-created item and is not editable.
- **Last modified on:** Date and time that this field was most recently changed.
- **Last modified by:** Name of account that made most recent change to this field.
- **Enable this custom field:** Checking this box will make the field available; unchecking will make it inactive.

Screen Order: Allows the user to choose the order in which custom fields appear on snap sections within ProForm. Selecting a row and then using the blue arrows at the top of the dialog is all that is required to make these changes.

Context: This list enables you to search for custom fields associated with a particular context.

Field Codes and Formatting Options

Formatting options can also be used with lookup entries that include field codes. Entries will be resolved based on the formatting option indicated.

Numeric fields: NOCOMMA, FILLn, PERCENT, WORDS, WORDSC, WORDSN, BRAC, DECn, NOZERO, UC

Date fields: SD, LD, UC, LDT, LDW, LDR

Sample lookup table and entries:

- {{Order.Property.Address1}} as key field
- {{.EscrowBriefLegal}} as second column

***Each optional formatting attribute must be separated by one or more spaces.

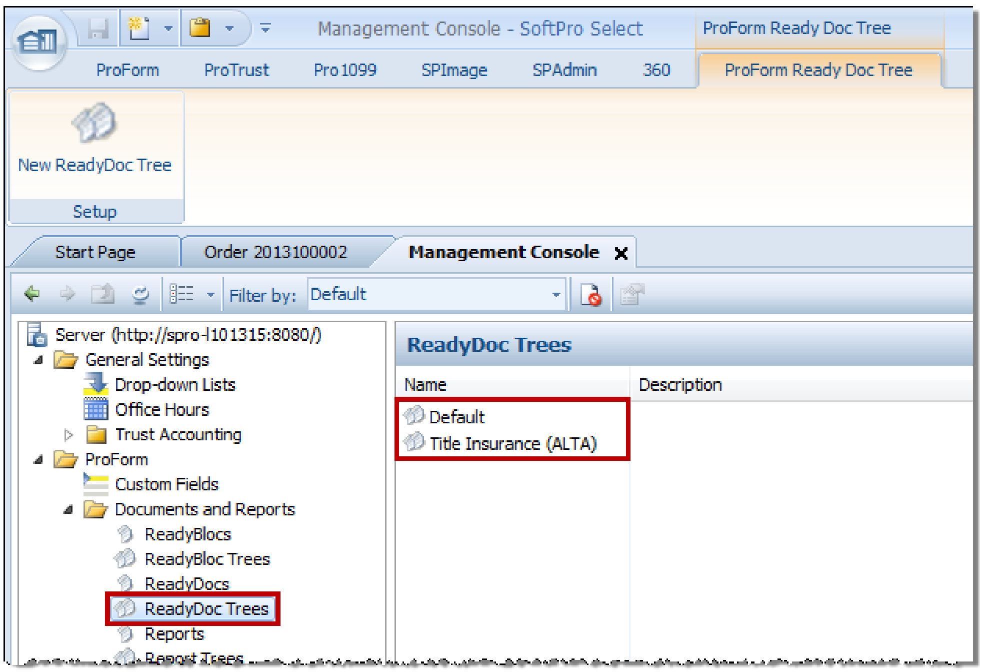
{{fieldcode option1 option2…}}

Address column	Escrow brief legal column
Sales Price 1	Blank Sales Price as blank using NoZero: {{Order.SalesContract.SalesPrice NOZERO}} Sales Price as words: {{Order.SalesContract.SalesPrice WORDS}} Sales Price as words with cents/100: {{Order.SalesContract.SalesPrice WORDSC}} Sales Price as words excluding decimal value: {{Order.SalesContract.SalesPrice WORDSN}} Sales Price as words for decimal value only: {{Order.SalesContract.SalesPrice WORDSD}} Sales Price in Words all UpperCase: {{Order.SalesContract.SalesPrice WORDS UC}}
Sales Price 2	Sales Price without commas: {{Order.SalesContract.SalesPrice NOCOMMA}} Sales Price in brackets: {{Order.SalesContract.SalesPrice BRAC}} Sales Price with 4 decimal places: {{Order.SalesContract.SalesPrice DEC4}} Sales Price as percent: {{Order.SalesContract.SalesPrice PERCENT}} Sales Price with AsteriskFill: {{Order.SalesContract.SalesPrice FILL15}} Sales Price without Commas with AsteriskFill: {{Order.SalesContract.SalesPrice NOCOMMA FILL15}}
Settlement Date	SD without formatting: {{Order.SettlementDate}} SD as MM/DD/YY: {{Order.SettlementDate SD}} SD as Month Day, Year: {{Order.SettlementDate LD}} SD as Month Day/Suffix, Year: {{Order.SettlementDate LDT}} SD as Weekday, Month Day, Year: {{Order.SettlementDate LDW}} SD as Day/Suffix day of Month, Year: {{Order.SettlementDate LDR}} SD as Day and Date all UpperCase: {{Order.SettlementDate LDW UC}}

ReadyDocs, ReadyBlocs, and Reports

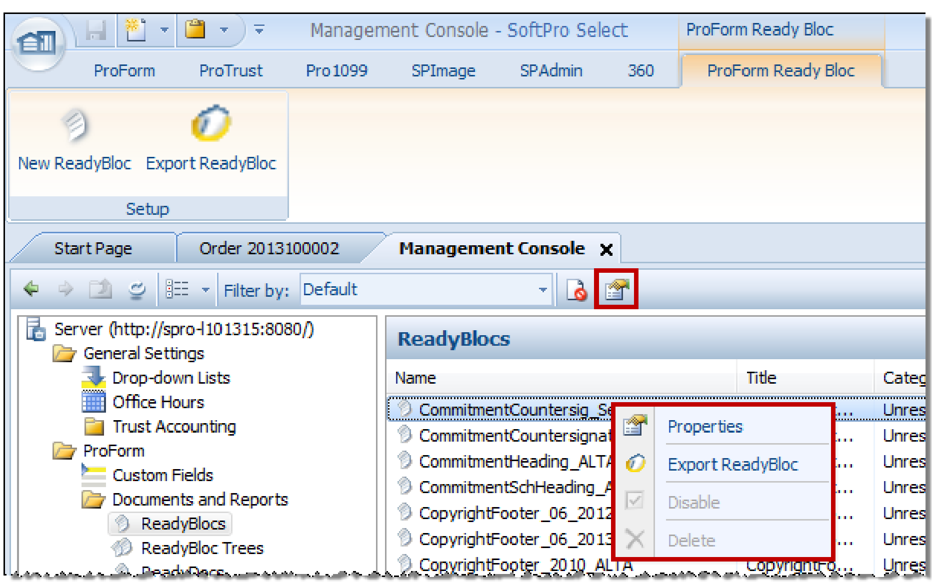
Document and report managers enable administrators to accomplish four main goals:

1. Adding (importing) documents and reports.
2. Exporting documents and reports.
3. Combining a set of documents and reports into a tree.
4. Associating a tree with a profile. Multiple document manager trees can be assigned to a single profile. For example:



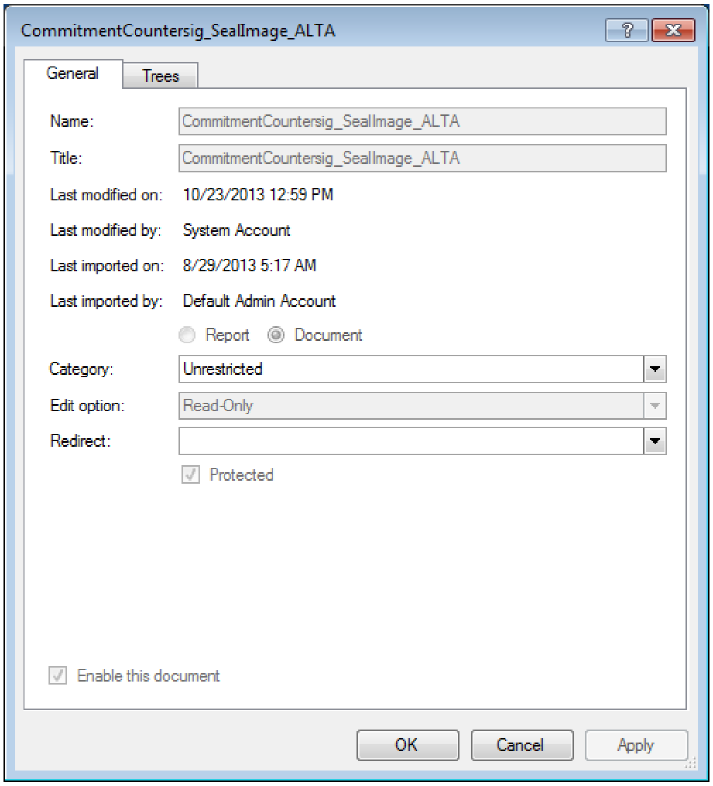
PROPERTIES

There are three ways to view the properties of a selected item in the **ReadyBlocs**, **ReadyDocs**, or **Reports**. You may select it and press the **Properties Button**, right click the item and select the **Properties** option, or **double click** the item.



ReadyBlocs

PROPERTIES: GENERAL/TREES TABS



Name: Displays the name of the ReadyBloc file as it was saved in the database.

Title: Enter the name of the ReadyBloc as it will show in the tree.

Last modified on/by: The date and login name will appear here after the ReadyBloc has been loaded and saved. This will change each time there is a modification to the manager entry.

Last imported on: The date and time listed here represent the last time the document was updated in the system via a document build install or manual import.

Last imported by: Indicates the user that last imported the document via a document build install or manual import.

Report/Document: Indicates whether the document is a ReadyBloc or a ReadyBloc report developed in Crystal Reports.

Category: Choosing a category allows administrators to restrict access to certain ReadyBlocs based on permissions. The available selections are:

- Accounting
- Bulk Sales
- Commercial-Escrow
- Commercial-Title
- Escrow
- Management
- Management-Escrow
- Management-Title

- Title
- Unrestricted

Edit option: Select from Read-Only, Restricted or Non-Restricted. This allows a document to be edited in design mode or in preview mode depending on the rights of the user.

Redirect: Selecting a ReadyBloc in the redirect drop-down enables the ReadyBloc currently in focus to take its place. This option allows users to customize some of the SoftPro ReadyBlocs to their own versions as the SoftPro ReadyBlocs are protected and cannot technically be overwritten. (For example, if ReadyBloc A is referenced on several documents, but the text in ReadyBloc B is preferred. Select ReadyBloc B in the redirect field for ReadyBloc A located on the Properties screen of the ProForm ReadyBloc Tree Manager in SPAdmin. When the document is rendered, any references to ReadyBloc A will automatically be redirected to ReadyBloc B.)

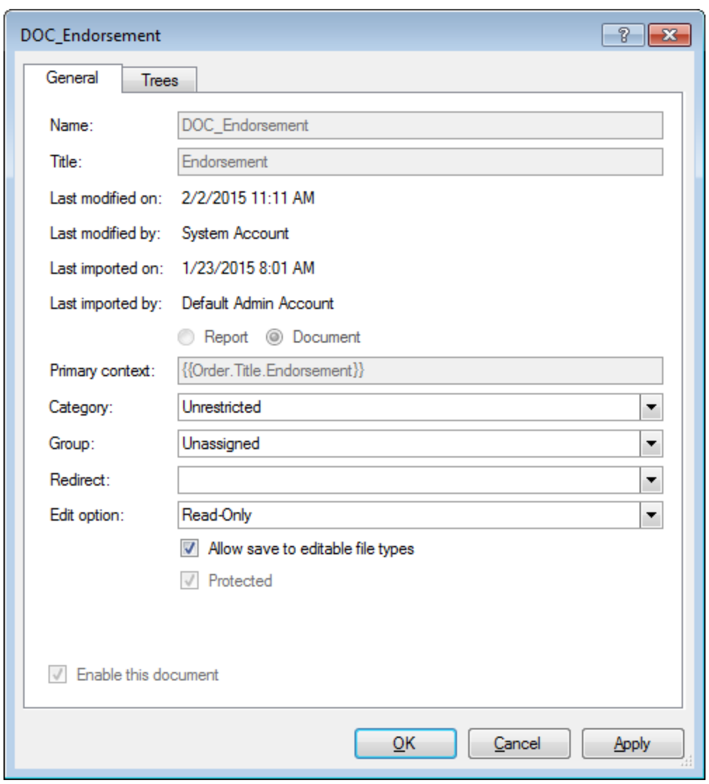
Protected:The Protected checkbox indicates a SoftPro-created item and is not editable.

Enable this document: Unchecking this box deactivates the ReadyBloc making it unavailable for use or viewing in a tree.

Trees Tab: displays to which tree(s) the ReadyBloc has been associated.

ReadyDocs

PROPERTIES: GENERAL/TREES TABS



Name: Displays the name of the ReadyDoc file as it was saved in the database.

Title: Enter the name of the ReadyDoc as it will show in the tree.

Last modified on/by: The date and login name will appear here after the ReadyDoc has been loaded and saved. This will change each time there is a modification to the manager entry.

Last imported on: The date and time listed here represent the last time the document was updated in the system via a document build install or manual import.

Last imported by: Indicates the user that last imported the document via a document build install or manual import.

Report/Document: Indicates whether the document is a ReadyDoc or a ReadyDoc report developed in Crystal Reports.

Primary context:Enables the document to print one per object. For example, if {{Order.Loan}} is selected as the primary context, the document will print a version for each loan in the order.

Category: Choosing a category allows administrators to restrict access to certain documents based on permissions. The available selections are:

- Accounting
- Bulk Sales
- Commercial-Escrow
- Commercial-Title
- Escrow
- Management
- Management-Escrow
- Management-Title
- Title
- Unrestricted

Redirect: This option allows users to incorporate a unique version of a given document. The user must create and import a new version of the document, then go to the properties portion of the original document to select this new version in the Redirect field. Whenever a document in the application asks for the original document, the app will check to see if the redirect field points to an alternate ReadyDoc and return that one instead.

- The redirected and original document must have the same primary context.
- The ReadyDoc tree is not affected when the redirect option is used; a tree pointing to the original doc will still point to that original doc. When a user requests that the original document be rendered in ProForm, the application will look for a redirect and will use the alternate specified ReadyDoc if available.

Edit option: Select from Read-Only, Restricted or Non-Restricted. This allows a document to be edited in design mode or in preview mode depending on the rights of the user.

Allow to save editable file types:Check this option to enable users to save rendered documents as a .doc, .rtf or .xls (for ReadyDoc Reports) and .doc or .rtf (for ReadyDoc documents). If the permission is not granted, users can only save rendered documents as a .pdf.

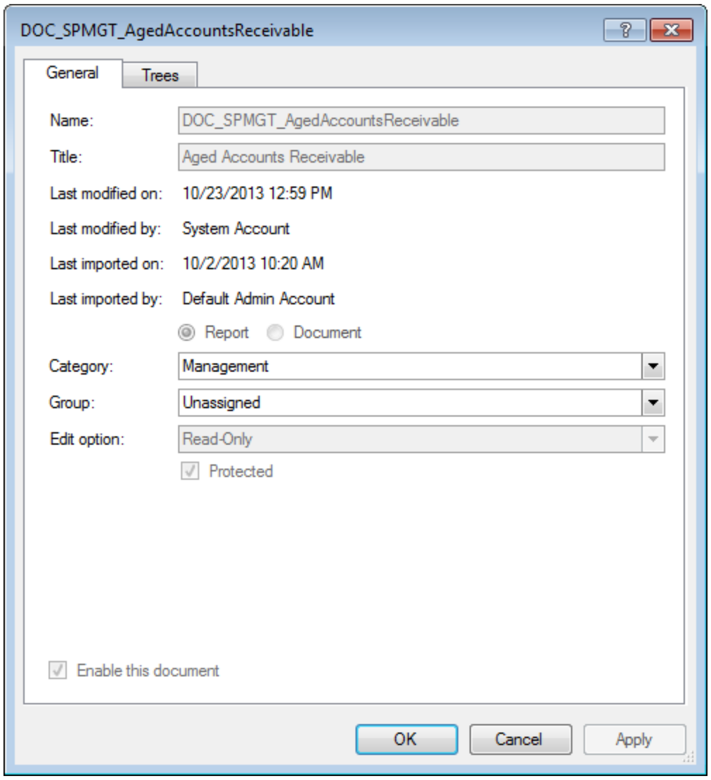
Protected:The Protected checkbox indicates a SoftPro-created item and is not editable.

Enable this document: Unchecking this box deactivates the ReadyDoc making it unavailable for use or viewing in a tree.

Trees Tab: displays to which tree(s) the ReadyDoc has been associated.

Reports

PROPERTIES: GENERAL/TREES TABS



Name: Displays the name of the Report file as it was saved in the database.

Title: Enter the name of the Report as it will show in the tree.

Last modified on/by: The date and login name will appear here after the Report has been loaded and saved. This will change each time there is a modification to the manager entry.

Last imported on: The date and time listed here represent the last time the document was updated in the system via a document build install or manual import.

Last imported by: Indicates the user that last imported the document via a document build install or manual import.

Report/Document: Indicates whether the document is a Report or a Report report developed in Crystal Reports. Report will always be selected.

Category: Choosing a category allows administrators to restrict access to certain reports based on permissions. The available selections are:

- Accounting
- Bulk Sales
- Commercial-Escrow
- Commercial-Title
- Escrow
- Management
- Management-Escrow

- Management-Title
- Title
- Unrestricted

Edit option:This option will always be set at Read-Only.

Protected: The Protected checkbox indicates a SoftPro-created item and is not editable.

Enable this document: Unchecking this box deactivates the Report making it unavailable for use or viewing in a tree.

Trees Tab: displays to which tree(s) the Report has been associated.

The Bucket

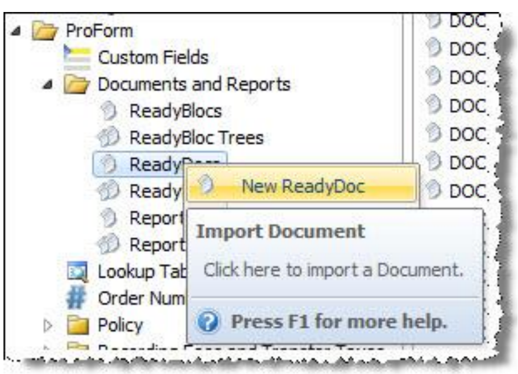
The Management Console screens for ReadyDocs, ReadyBlocs and Reports are commonly referred to as "the bucket" or a repository in which all documents, ReadyBlocs and Reports, regardless of their tree affiliation, are housed. Documents may be imported or exported manually from the bucket, permissions allowing, or the documents may be installed as part of a build installation process.

Filter by: Displays all profiles. It defaults to blank when the manager is first opened and is fully controlled by the user after that. SoftPro Select will not erase the user's value or default the value when different managers are selected or a different tree filter is selected. If Filter By is blank, all documents or reports of the appropriate type (based on tree type) display. If a profile is selected, only documents or reports at that profile level or beneath that profile level will be displayed.

Show inactive: Check to display inactive documents. By default, only active documents or reports are displayed in the list, but inactive documents or reports are also shown if the **Show inactive** checkbox is checked.

IMPORTING DOCUMENTS/REPORTS

To import a document into the bucket, right-click on the ReadyDocs, ReadyBlocs or Reports header in the Configuration list and select New ReadyDoc/ReadyBloc/Report:



This will launch a browse window allowing users to select the document/report they wish to import.

Once selected the Name, Title, Report/Document button, Primary Context, Category, Group and Edit Options will all be defaulted. Change any settings necessary and click OK to save the document/report to the bucket.

EXPORTING DOCUMENTS/REPORTS

To export a document or report, highlight the desired document/report in the bucket, right-click and select Export ReadyDoc/ReadyBloc/Report from the pop-up menu. This will produce a browse window allowing the user to specify the location in which to house the exported document/report. Report file types default to .rpt formats while ReadyDocs and ReadyBlocs default to .doc files.

Tree Managers

The Tree managers arrange the ReadyDocs, ReadyBlocs and Reports into a structured, multi-tiered format for users to organize their document production. The structure of the tree is entirely up to the administrator. A folder can contain additional folders and/or documents/reports. A document cannot serve as a parent for another document or folder. Each document must be stored in a folder.

General Tab

Name: Enter the name of the tree as it will show in ProForm.

Description: Enter a brief description of the tree to indicate its use.

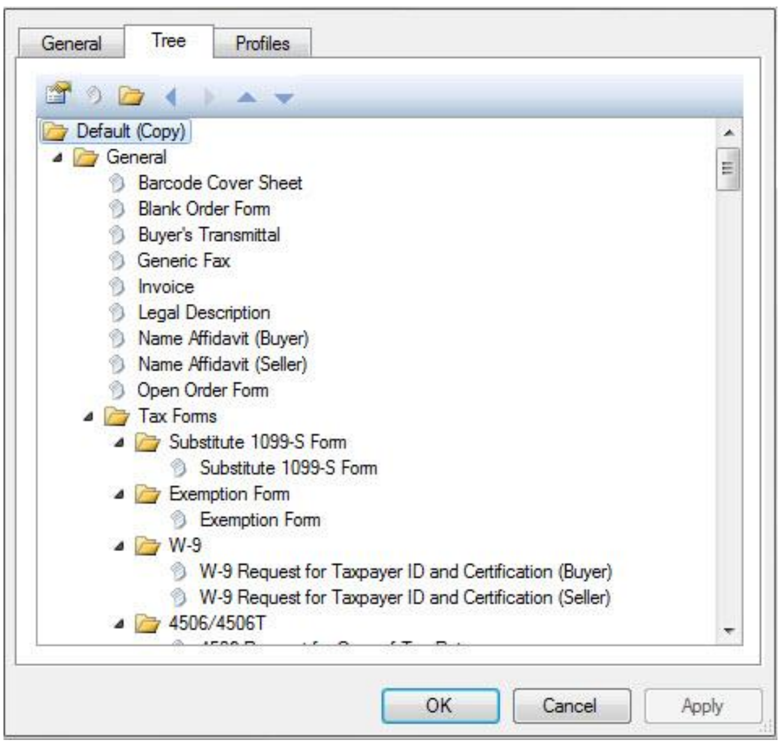
Last Modified on/by: The date and login name will appear here after the Tree has been loaded and saved. This will change each time there is a modification to the tree structure.

Protected: The Protected checkbox indicates this is a SoftPro-created tree and is not editable.

Enable this document tree: Unchecking this box deactivates the tree making it unavailable for use.

Tree Tab

This tab displays the structure of the tree and allows administrators to add, remove and rearrange contents as desired.



Properties: Click Properties to open the Properties dialog of the highlighted document or report. The dialog displays properties of the highlighted document such as **Title**, **Profile** and **Primary Context.**

Add Documents: Click the Add Document button and select a document and to add it to the tree. The placement depends on which part of the tree has been selected prior to clicking the button:

- If nothing in the tree has been selected, the selected docs/reports will be added to the bottom of the tree in the default folder.

- If an empty folder in the tree has been selected, the selected docs/reports will be added to the folder.
- If a folder that already contains docs/reports has been selected, the selected docs/reports will be added at the bottom of the folder, below the other docs/reports in that folder.
- If a document has been selected, the selected docs/reports will be added directly under the highlighted tree doc, at the same level.

Administrators may also add a document to the tree by selecting the desired folder, right-clicking and selecting **Add Documents**. To **Remove** a document/report from a tree, highlight the document, right-click and Select **Remove Document**.

Add Folder:Click this button to add a new folder directly below the location in the tree. The new folder will be named "New Folder" by default, but the name is editable. Once a folder has been named, id can be renamed by right-clicking the folder and selecting **Rename**. Double-clicking a folder opens and closes it.

Move Left/Right/Up/Down: Use the right/left buttons to change the tier level at which the document/report/folder will appear. Use the up/down levels to modify the vertical location in the tree. Items can also be moved in the tree by dragging and dropping.

Profiles Tab

This tab allows administrators to assign the selected tree to various profiles, as desired.

Lookup Management Console

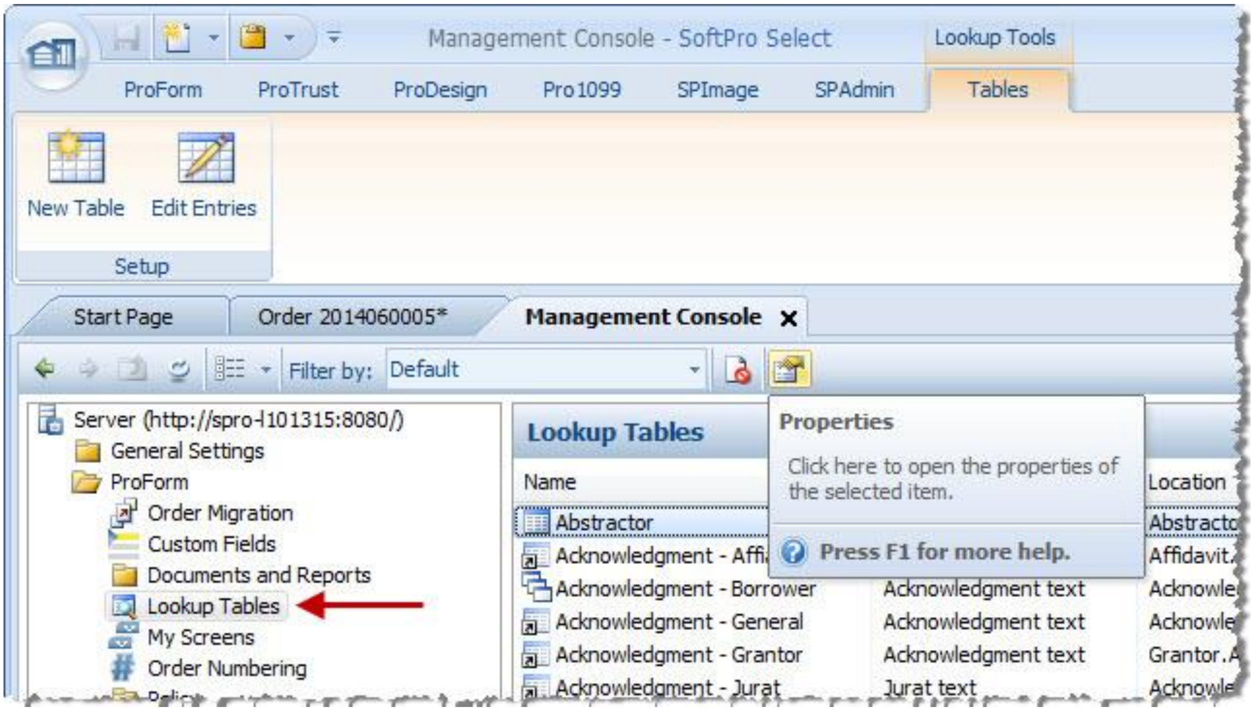
Lookup tables facilitate the entry of common data by storing repetitive data in a central location. In ProForm, click the lookup hyperlink or press **F9** within a data entry field to access these tables. Lookup tables also help to maintain data integrity. For example, multiple orders may reference one entity in a lookup table. When statistics are generated on this entity, they include data across multiple orders.

- Contents of independent tables are not linked to other tables.
- Contents of base tables are pushed into another table.
- Contents of alias tables are pulled from another table.

The Lookup Table Management console provides:

- Filtering of lookup table entries based on profiles
- Persistent layout information for the table for column sizing and sort order
- Sizable screens in order to view more data
- QuickText for field-name entry
- Managerial view of the lookup tables for adding/editing/deleting tables and table data
- Filtered entries based off of data in other fields within the order
- A table is modifiable through the manager only
- Particular fields with associated lookup tables bound to it
- Auto-completion of entries based on the key field of a lookup table

The console can be found in **SPAdmin > Configuration > ProForm Folder > Lookup Tables**:

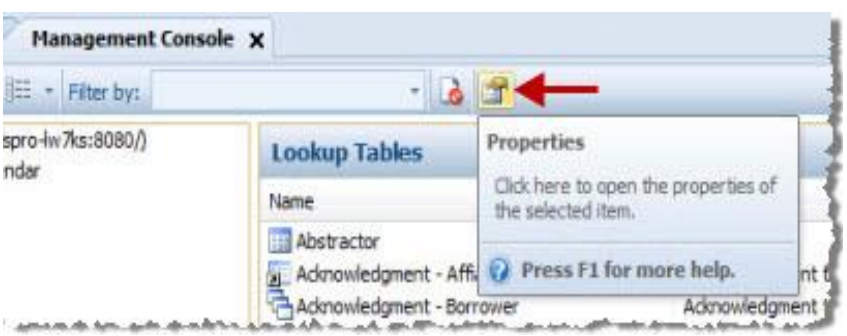


There are two main sections of the management console:

1. Table structure and administrative settings (properties) and
2. Lookup entry editor (edit entries).

Properties

To access the properties of a particular table in the manager, right-click a lookup table and select **Properties** or select the Properties icon from the toolbar.

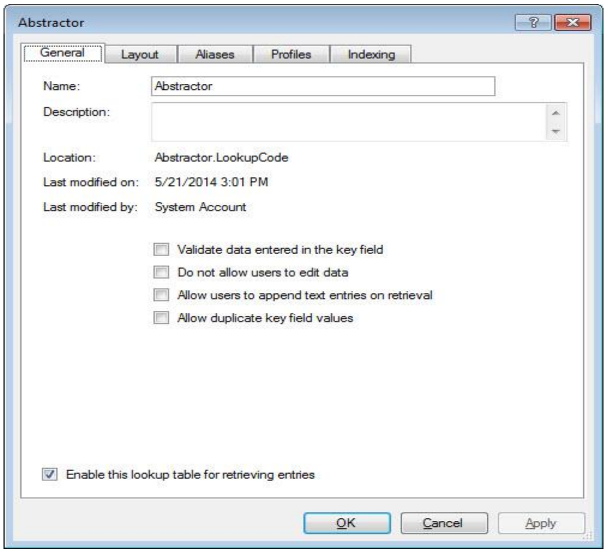


There are five tabs in the **Properties** dialog (for a base table, four if it is an alias table):

- General
- Layout
- Aliases
- Profiles
- Indexing

GENERAL TAB

The general tab provides the name, description, location, last modified date, last modified by and additional administrative settings.



Name: Enter the name of the lookup table being created.

Description: Enter additional information for descriptive purposes.

Location: Indicates the field code in the program to which the lookup table is tied

Last modified on: The date appears here after the lookup table has been created and saved. This will change each time there is a modification to the lookup entry.

Last modified by: The user's login name appears here after the lookup table has been created and saved. This will change each time there is a modification to the lookup entry.

Validate data entered in the key field: When selected, an error message is supplied when data entry into the key field in ProForm provides no match of lookup table entries.

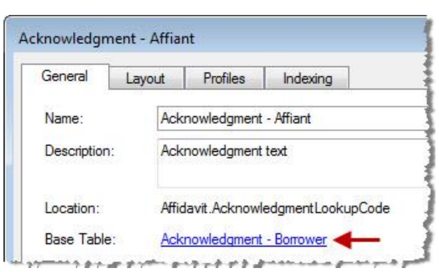
Do not allow users to edit: When selected, for a specified lookup table, user is unable to add, delete, or modify data during lookup regardless of permissions. Insert from Order is also disabled.

Allow users to append text entries on retrieval: When selected, for a specified lookup table, user is able to retrieve more than one lookup entry into a field.

Allow duplicate key fields: Allows entries with duplicate key field values to be present.

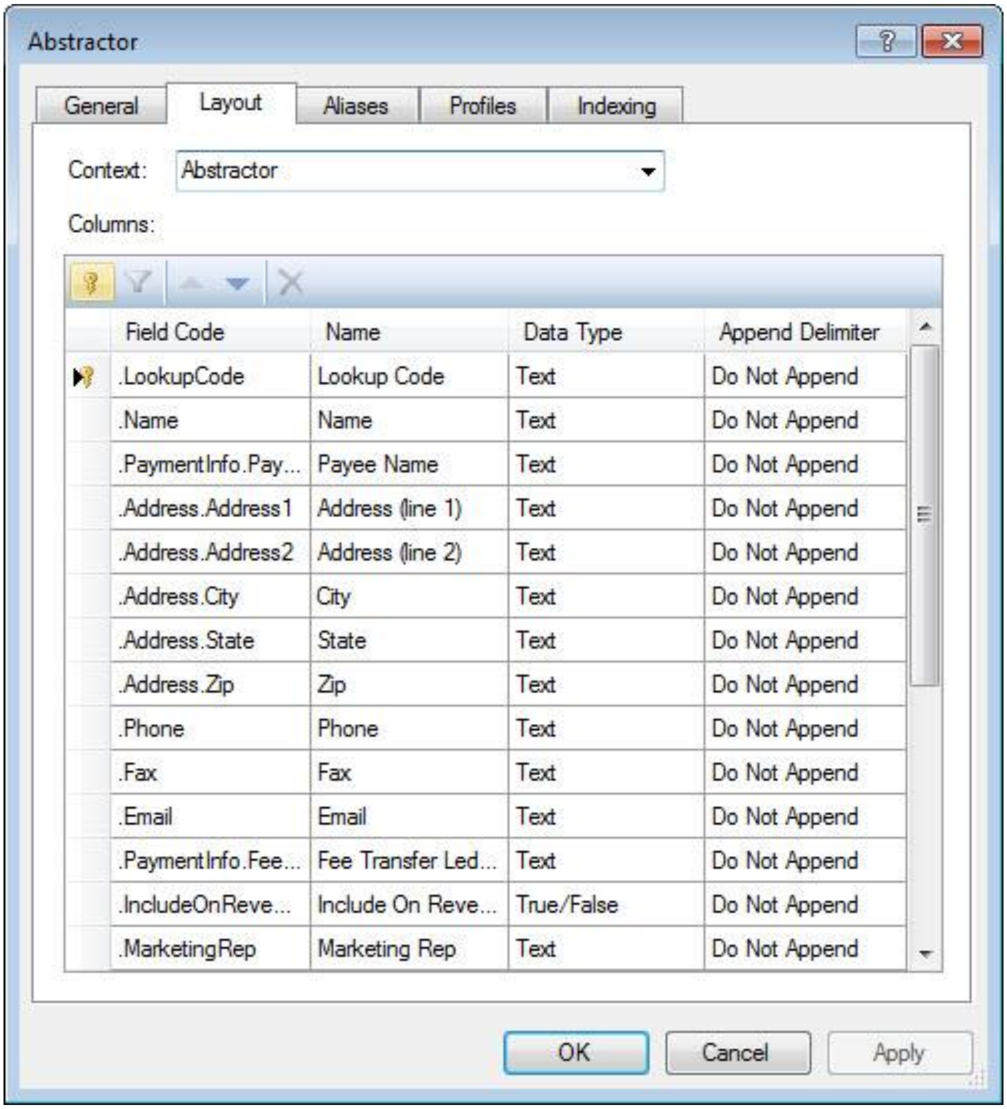
Enable this lookup table for retrieving entries: Select this box to enable the lookup table.

Note: An alias table will not contain the "Aliases" tab but will contain a hyperlink to the base table for editing.



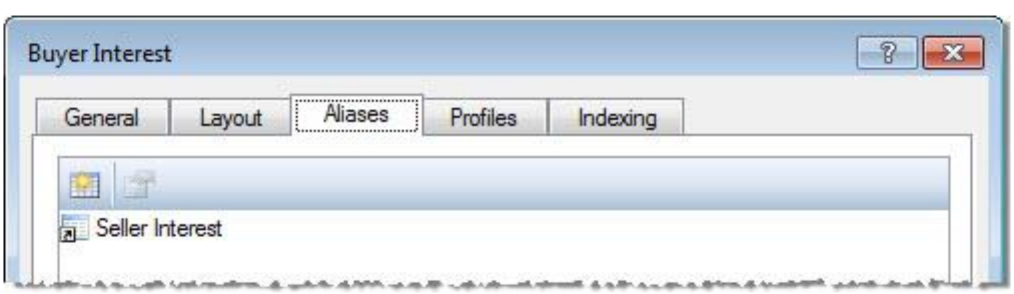
LAYOUT TAB

The layout tab defines the context and the fields included in the lookup table. It establishes the lookup key, lookup filter field and an append delimiter, if desired. The data type is displayed for informational purposes only. See the layout tab topic page for more details.



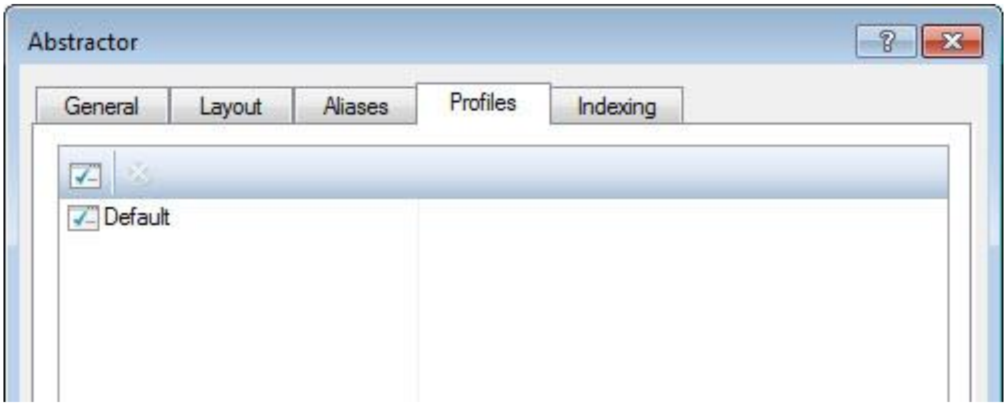
ALIASES TAB

The aliases tab is only present for base tables and displays any tables referencing that base table.



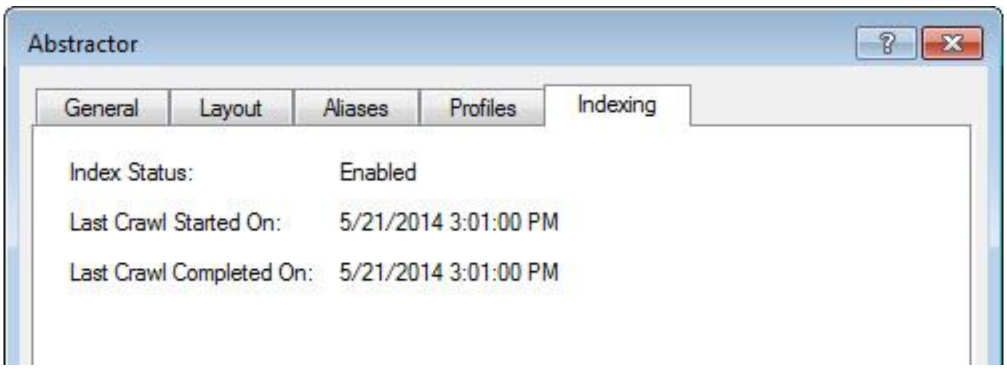
PROFILES TAB

The profiles tab enables the user to link profiles to the lookup table.



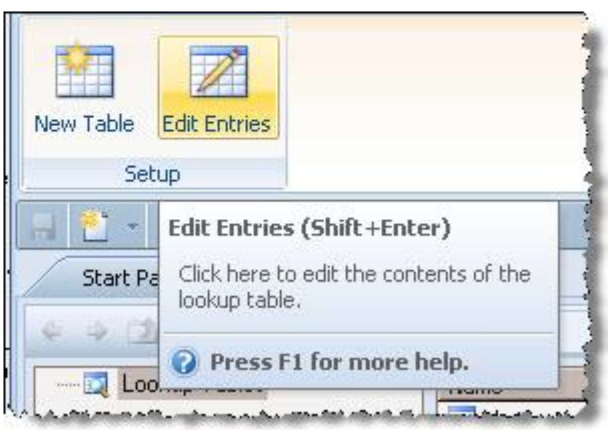
INDEXING TAB

The indexing tab is utilized for diagnostic purposes only.



Lookup Entry Editor

To access the entry editor feature, right-click on the desired table and select **Edit Entries** or click the Edit Entries action item icon from the setup section.



The entry editor consists of three main components: the contextual tab, an expandable editor and the entry grid.

THE CONTEXTUAL TAB

The contextual tab provides multiple editing and formatting tools, including the standard clipboard, format and search tools.

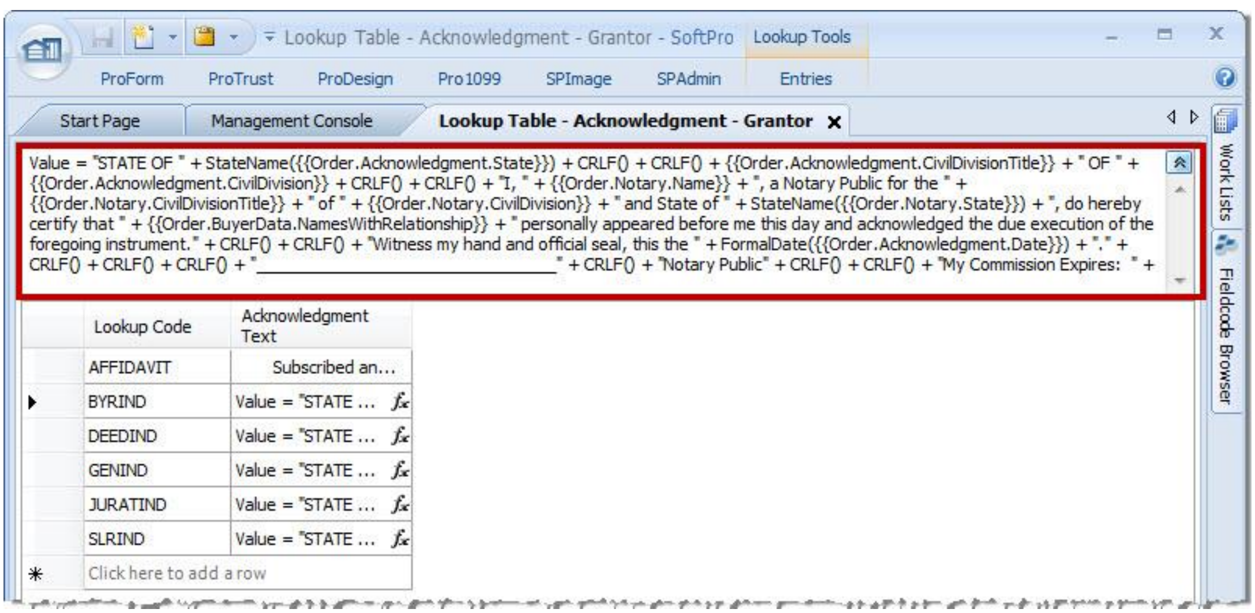
The **Format** section may be used to edit the font and paragraph styles of your lookup table entries. Options such as bolding, underlining, italicizing and indenting can be applied to the rtf fields via this tool. Additionally, the user can now set data in a cell to a formula by clicking the formula symbol as an indicator or by beginning the cell entry with an = sign. The cell will then be marked with a formula symbol *fx* as an indicator.

The **Find** feature has been enhanced to provide the ability to conduct a keyword search. Complete or partial entries can be entered (i.e. "Acknowledgment" can be entered or "Ack" will return all entries containing words that start with Ack.) Press enter or the Go arrow to return your search results. The top 200 results are initially returned (<200) but the display can be changed to provide the top 1000 entries (1K) or all entries (MAX).

The **File Import/Export** options allow the user to pull lookup table information into a given table from an .xls or .csv file or export a look table's contents to .csv. This functionality walks the user through the process(es) step-by-step.

THE EXPANDABLE EDITOR

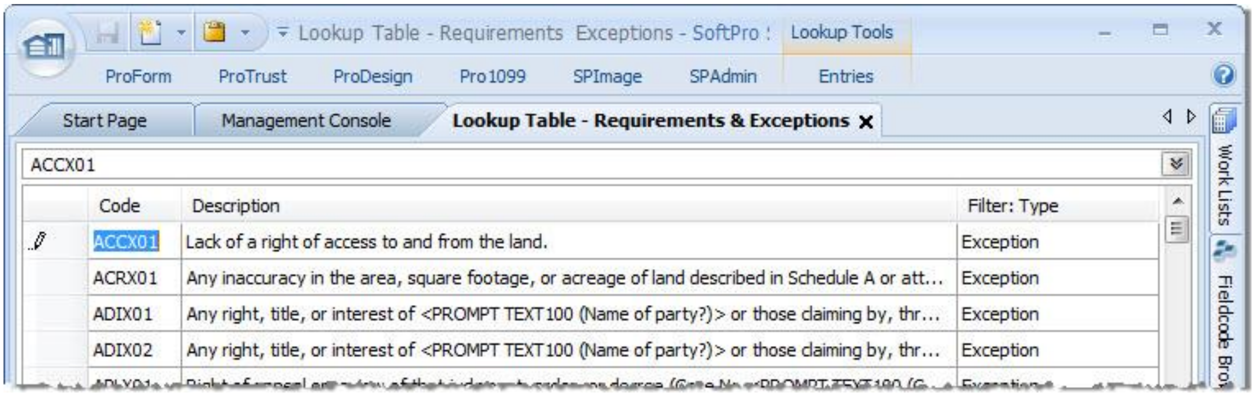
All RTF fields can be edited in the expandable editor, regardless of the number of characters.



The editor provides a comprehensive view of columns that contain large amounts of data such as legal descriptions. Expand the editor by clicking on the down arrow on the right or by dragging the bottom of the cell to enlarge the frame to the desired size. There is no limit to the number of characters allowed in these fields but the cursor must be placed into the field to enable formatting buttons for columns that allow formatted text. The **clipboard** and **F2** keys can now be used and the right click menu of **copy**, **paste**, **cut** and **delete** is also enabled.

THE ENTRY GRID

The entry grid is the comprehensive list of the columns and rows contained within the selected lookup table.

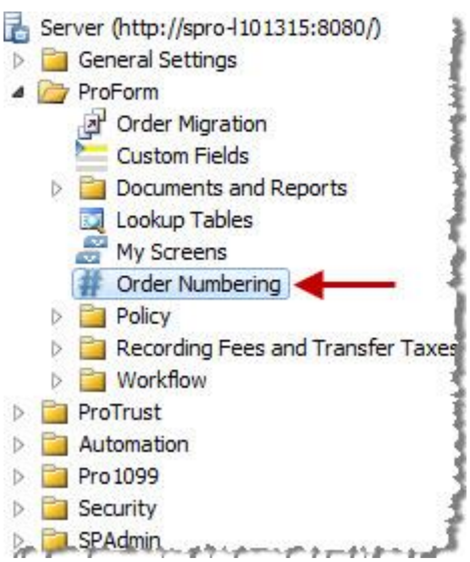


Entries can be sorted by double-clicking on the column headers.

Multiple entries may be flagged for deletion and removed but they are no longer marked as deleted and held in the database; instead they are deleted from the database.

Order Numbering Manager

Use the order number manager to create order numbers for new orders. This is found in SPAdmin in the ProForm folder under the Configuration action item button list:



General Tab

Name: Enter the name of the order number manager.

Description: Enter additional information for descriptive purposes.

Last modified on: The date appears here after the order number manager has been created and saved. This changes each time there is a modification.

Last modified by: The login name appears here after the order number manager has been created and saved. This changes each time there is a modification.

Enable this numbering scheme for creating order numbers: Select this box to activate the order number manager.

Numbering Scheme Tab

Field	Description
AUTO GENERATE ORDER NUMBER	Order numbers will be automatically generated that cannot be edited by the user.
FORMAT	Each title or closing file created in ProForm must be assigned a unique file number. An order number sample is automatically updated each time the format, sequence number and the prefix and suffix change. Use the format field to enter the formula you would like the automatic order numbering feature to follow when naming new order. A formula contains a combination of the following codes placed in the order in which you want them to appear in an order number. Do not include spaces between the codes: • " ": Inserts text between quotes. For example, to the have the prefix SP (for SoftPro) inserted at the beginning of each new order name, enter "SP" at the beginning of your format. You can include any text that you like to meet your requirements. NOTE: The quotation marks will not be displayed in order number. • Y or y: Inserts current year. Use Y for four-digit year (ex. 2007) or y for two-digit year (ex. 07). • M or m: Inserts number of current month. Use M for two-digit month (ex. January would appear as 01) or m for single-digit month (ex. January would appears 1). • S: Inserts order number sequence. Enter as many S characters as you want spaces in the sequence. By default the first number in the sequence will be 1. For example, the first number in SSSS format 0001. Maximum entry is nine (9). • s: Same as S. • 1: Inserts the last digit of the current year. • A or a: Inserts the single letter equivalent (A - L) of the current month. (e.g. January = A, February = B, December = L). • **D:** Inserts the current day as a two-digit value (01-31). • **d:** Inserts the current day as a one- or two-digit value (1-31). • **J:** Inserts the Julian date value for the current day of the year as a three-digit value (001-366). • **j:** Inserts the Julian date value for the current day of the year as a one-, two-, or three-digit

value (1-366).

You can use any combination of codes in your format, not to exceed 30 total characters. For instance, if you want each new order number to contain the letters **SP**, the four-digit year, the double-digit month and a three digit order number, enter **"SP"YMSSS**.

NOTE: As you create your order number configuration, the number appears in the sample box to make sure that you set up your numbering as needed.

SEQUENCE NUMBER

Minimum and **Maximum** determine the range of sequence numbers that may be used by this manager. The Maximum number cannot exceed 999,999,999. If Minimum is set to a number higher than Maximum, the numbers will switch automatically. If Minimum is set to a number that is greater than the next sequence number, the next sequence number will be set to the minimum value.

Next number: This contains the next available sequence number for this manager. With the appropriate permission, you can change the next number to a number that is more appropriate.

Reset: Use this to specify when the sequence number should be reset. Select from:

- Daily, Monthly, Yearly, Rollover or None (no reset at all): For time-based resets, the sequence number resets to the minimum number whenever a change occurs in the part of the date that is the basis for the reset.
- For Rollover, the system resets to the minimum sequence number whenever it exceeds the maximum sequence number.
- When None is selected, the sequence number is incremented ad infinitum or until it reaches its maximum value.

REQUIRE AN ORDER NUMBER (PREFIX OR SUFFIX)

If selected, this option requires you to select one of the options from the Order Number Prefix or Suffix drop-down contents when creating a new order. Un-check this option to create a file with or without a file order prefix or suffix.

ORDER NUMBER PREFIXES AND SUFFIXES

Below the format and sequence number area is the area for **prefixes** and **suffixes**. These act the same way. All controls for the prefixes and suffixes will be enabled at all times, allowing you to add or delete prefixes and suffixes without selecting one or both.

At the top of the area a checkbox indicates if a prefix or suffix will be required for the order number. Enter prefixes or suffixes in the first dialog box. You are limited to three characters. Input your text, then press **Enter** or click the **Add** button to add the prefix or suffix to the list. The **Edit** box is then cleared.

You can also press **Enter** to display all prefixes and suffixes in alphabetical order. Prefixes and suffixes already in the list cannot be edited. If you want to remove a prefix or suffix, select one or more entries and click the delete button. Pressing the **Delete** key removes the selected entries. If no entries are selected, the delete button is not available.

Profiles Tab

This tab in the Properties dialog allows you to assign or remove profiles associated with the Ordering Numbering manager. Only one Order Numbering scheme per profile is permitted. If the Administrator attempts to associate more than one order numbering scheme with a profile, they receive a **Profile conflict found error** upon assigning the profile and are asked if they want to reassign the profiles to this numbering manager. Clicking **Yes** reassigns the profile to the new manager. Clicking **No** keeps the profile associated with the current office numbering manager.

Policy

General Tab

Code: Enter a code to associate with a policy - this field will filter in the applicable coverage amounts and activate the premium calculations on the title insurance premium screen.
Description: When in Lookup mode, this field is automatically populated with information from the Policy Manager - which is where the policy codes are created for lookup mode. If you are in user-entered mode, though, the Description field is enabled, and you would manually enter information.
State: Select a state for the premiums from the drop-down list. This is based on the state(s) for which the policies were created.
Zone: Select a zone or area from the drop-down list, if applicable (See SPAdmin, then Tools, then Drop-down Lists for additional information).
Underwriter:
Policy Type: Enter the type of policy; select from the following: Simultaneous, Owners, or Loan.

Loan/Owner's Policy Tabs

PREMIUM CALCULATION
Basis: This field determines the basis for the coverage amount. The default selections are (asterisks apply to loan only):

- (None)
- Loan Amount
- Sales Price
- Higher of Loan Amount or Sales Price
- 125% of Loan Amount*
- Loan Amount in Excess*

Multiplication%: Use this to adjust the base premium calculation using a percentage. Enter the percentage of the base premium amount to be included in the calculation of the total net premium amount.

Rate table: Select the rate table to associate with the selected policy type.

Adjustment+/-: Use this field to adjust the base premium by adding or subtracting a dollar amount.

Method: Default is the standard method of calculating the premium based on the rate table selected, however, if the premium needs to be calculated differently (in a special way), the method can be selected.

- **Default**: Calculates based on the loan amount or sales price as selected.
- **Loan Higher**: Calculate the loan premium as regular using the appropriate level in the rate table. Use the difference between the loan coverage and the owner's coverage and calculate the premium at the same level as

the full coverage amount. Take the difference between the full loan premium and the loan premium for the difference - this is the premium amount for the loan policy.

- **TX-Sim**: Will calculate similarly to the loan higher calculation while enabling a calculation for the endorsements based on the rate set in the loan amount.

Simultaneous fee: Enter the additional fee charged for a simultaneous issuance of the owner's and loan policies.

Multiplication % for amount not exceeding owner's policy:

PREMIUM CALCULATION - FULL LOAN PREMIUM

Rate table: This option applies to Simultaneous Issue policies and corresponds with the Full loan premium rate table drop-down list found on the Loan Policy Premium and Split section of the Title Insurance Premiums screen.

SEND PREMIUM TO

CDF: The user may use this field to specify a particular CDF line. **Note**: it is strongly recommended that title fees be managed via the dropdown lists on the **Options screen** underneath the **Title – CDF section defaults**.

HUD-1 (2009): Select the HUD Line for the 2009 version of the HUD-1 to which the final premium will be sent.

Disclosure: Check this option to indicate a disclosure.

HUD-1 (1986):Select the HUD Line for the 1986 version of the HUD-1 to which the final premium will be sent.

Taxable: Check this option to indicate if the charge is taxable. **Note**: This option is visible in the order only when the Sales Tax option in SPAdmin, Preferences, ProForm Order Options is checked.

Invoice: Select the invoice on which premium will be listed.

Bill Code: Select the applicable bill code. This is for revenue reports.

SEND SELLER CREDIT TO

CDF: Use this to specify a particular CDF line for the seller credit.

HUD-1: Use this drop-down list to specify a particular HUD-1 line for the seller credit.

SPLIT

Split based on: This field controls how the split will be calculated.Choose between Split Rate Table and select the applicable rate or Premium Calculation and select the applicable premium off of which the split should be calculated.

Split %: the initial percentage of the final premium to split out to the underwriter (typically).

Balance %: for a secondary split, this is percent remaining from which a split allowed. (The party to which this amount is sent will be determined on the Title Insurance Premium Screen.)

Prior Policy

Reissue rate/discount: Select Yes or No to indicate if this prior policy is eligible for a lower reissue rate or discount.

Discount table: enter a discount table to use in the calculation of the reissue rate.

Premium rate table: enter the rate table to calculate the base premium.

Apply adjustment to: Select a premium/split combination to which the adjustment applies.

Guaranty Fees

GUARANTY FEE/RECOUPMENT FEE

The Guaranty Fee is available when the Commitment Schedule D preference is checked in the order's owning profile. The Recoupment Fee is available when the Recoupment Fee preference is checked in the order's owning profile. Information regarding the fees can be added in the Policy Manager for each policy premium type.

Description: Defaults to Guaranty fee and Recoupment fee or enter the Description for the fees to be used on the HUD-1 line. Allows 100 characters.

Amount: Enter the amount of the fee.

Bill code: Select the applicable bill code. This is for revenue reports.

Line: Enter the HUD Line. The total of both owner's and loan policy guaranty fees will default in the RE field on the HUD line selected for the loan policy guaranty fee. The amount in the RE field will print as the "outside of column amount" on the HUD-1 Settlement Statement. (2009 HUD-1 only)

Disclosure: This checkbox is only visible if the **Use 2009 RESPA** option is checked. If this field is checked, the borrower amount appears in the Disclosure amount field for the selected HUD-1 line. If this field is unchecked, the borrower amount appears in the Borrower amount field for the selected HUD-1 line. If an amount is sent to a HUD-1 line and there is a Seller Pay%, only the borrower's portion will be sent to the Disclosure amount if this checkbox is checked.

Payee: The party indicated in this field will receive a disbursement and will show on the previously associated HUD-1 Line. Any code can be used for the Guaranty Fee or Recoupment fee. (2009 HUD-1 only)

Premium Rates

Configuration of title insurance rates are handled with SPAdmin - Managers - Rate Table - Premium, Rate Table Discount and Policy/ For building purposes, it is highly recommended that you first create the rates, discounts then policies.

The Premium Rates Manager is used for loan policy rates, owner policy rates, underwriter/agent split rates for loan and owner policies, and prior policy rates. To add a new entry and activate the rate table premium

wizard, from SPAdmin, click the Configure button, and then select Premium Rates from the Policy folder. Right-click on Premium Rates and select the New Rate Table option from the pop-up menu.

General Tab

Name: Enter a name for the table.

Description: Enter a more detailed description if necessary.

Last modified on/by: The date and login name display after the manager has been created and saved. This changes each time there is a modification to the entry.

Version: Versions are automatically numbered. Add new versions when you

Version status: Three types of versions exist: under construction (not yet made current), current or obsolete. To make changes to a particular entry you must select new version, make your changes, save and make current. **Note:** In order to make rate tables or fee schedules available for use in other areas of ProForm, you will need to set the version status to "current". The prior version becomes "obsolete".

- **New Version button:** To make changes to a particular entry, select New Version, makes changes, save then make them "current". When the latest version of the table is current and the table has no "under construction" versions, selection of this button creates a numbered version of the table. The new version will be set as under construction. The version number will be increased by one.

Underwriter effective date: Enter the effective date of the premium rates as determined by the underwriter. Leave blank if unknown.

Coverage rounding: To round coverage amounts of new policies:

- **Standard** - Executes standard mathematical rounding where if the last digit of precision for a value is less than 5, then the value is rounded down; if greater than 5, it is rounded up. If it is exactly 5, then the value is rounded up.
- **Banker** - Executes standard mathematical rounding where if the last digit of precision for a value is less than 5, then the value is rounded down; if greater than 5, it is rounded up. If it is exactly 5, then the value is rounded to the nearest even number.
- **Truncate** - Always rounds down.
- **Round up** - Always rounds up.
- **None** – Premium rounding never occurs.

Premium rounding: Select the appropriate rounding for the premium that will be applied within the table.

- **Standard** - Executes standard mathematical rounding where if the last digit of precision for a value is less than 5, then the value is rounded down; if greater than 5, it is rounded up. If it is exactly 5, then the value is rounded up.
- **Banker** - Executes standard mathematical rounding where if the last digit of precision for a value is less than 5, then the value is rounded down; if greater than 5, it is rounded up. If it is exactly 5, then the value is rounded to the nearest even number.
- **Truncate** - Always rounds down.
- **Round up** - Always rounds up.
- **None** – Premium rounding never occurs.

Round to nearest: Enter the number of decimal places (.01) to which you want the calculated premium rounded. Enter 1.00 in this field to round the premium to a whole dollar amount.

Premium multiplier: If necessary, enter a multiplier. The calculated premium will be multiplied by the number entered here. **Note:** The default for this field is 1.0.

ROUNDING:

- **After multiplier** – Premium rounding occurs after multiplier applied.
- **Before multiplier** – Premium rounding occurs before multiplier applied.
- **Before and after multiplier** – Premium rounding occurs before multiplier applied and again after multiplier applied.
- **None** – Premium rounding never occurs.

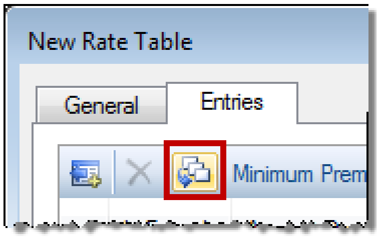
Make Current button: Sets the currently selected version as the active version.

Entries Tab

Add In(s) button: Adds a new entry to the table.

Delete button: Deletes the selected entry from the table.

Import button: Selecting Import displays a dialog allowing the user to browse for a .CSV (Comma-separated values) file to import into the Fixed Rate table. A text editor, such as Notepad or Microsoft Excel, can be used to create a .CSV file.



The first row of the .CSV file must contain the column headers: **Row,Min,Max,Cost** without spaces. All remaining rows should contain the corresponding column data, without spaces. If data has previously been entered in the Fixed Rate Schedule and Import is selected, a warning will appear, informing the user that existing data will be overwritten Here's an example of the format of a .CSV file:

```
Row,Min,Max,Cost
1,0,100,10
2,100,200,20
3,200,300,30
```

Min. Premium button: Press to bring up the Rate Table Edit Minimum Premium dialog. This dialog mimics the Formula Premium Mgr page of the Rate Table manager, allowing the administrator to specify the first and second row updates handling the minimum premium, rate, up to coverage amount, and max coverage at minimum premium.

Test button: Press **Test** to verify coverage amounts calculated against the rate table currently displayed by the Rate Table manager. Verifying the table is based on the latest values set in the Manager screen. The Test Rate Table calculations use the latest premium, premium multiplier and multiplier rounding value updates.

All data in the rate table manager screen must be complete. If any data is missing, or is invalid, an error message appears.

Make Current button: Sets the currently selected version as the active version. This button is not available if only one version exists.

Discount Rates

To add a new entry, from SPAdmin, select the Manager tab, then Rate Table-Discount. Click the Add button or press Insert. Save once you have finished and review the setup.

General Tab

Name: Enter a name for the table.

Description: Enter a more detailed description if necessary.

Last modified/By: The date and login name display after the information has been created and saved. This changes each time there is a modification to the entry.

Version: Versions are automatically numbered.

- **New Version button:** To make changes to a particular entry, press the New Version button to make changes. Save to make current. When the latest version of the table is current and the table has no "under construction" versions, selection of this button creates a numbered version of the table. The new version will be set as under construction. The version number will be increased by one.

Underwriter effective date: Enter the effective date of the discount rates as determined by the underwriter. Leave blank if unknown.

Minimum premium: The minimum premium amount to be used when calculating a discount.

Enable this discount table: This checkbox makes the table available for use.

Make Current button: Sets the currently selected version as the active version. This button is not available if only one version exists.

Entries

Add and Delete buttons: Adds a new row at the end of the collection. **Delete** removes the selected row from the list.

Years at: The first line of the Aged Discount Manager will always be set to Years and under. The range of the age will always start at 0 and go to the value set in the number of years field.

- **The years and up to:** The range specification of the next percentage rate of the schedule. The starting value row is always disabled. If you click the “Add” row button, you will be prompted to reset the last row to “years and up to” to continue additions to the discount schedule. For the additional rows, the leading label "Over" will be displayed and the starting value of the range is always the value set in the previous row "years at" value.
- **Years:** The years option marks the last line of the discount schedule. Press the Add button to add the last line and from the drop-down, select years and enter the applicable percentage rate.

% of original rate: Percent of original amount used in calculation of discount amount. the percent values must be integer values, between (and including) 0 and 100.

Make Current button: Sets the currently selected version as the active version. This button is not available if only one version exists.

City/County Tax/Stamps

The information entered here will be retrieved on HUD line 1202 for recording purposes. To add a new entry, right-click on Recording Fees and select New Fee Schedule.

General Tab

Name: Enter the name. Keep in mind that this is what you will see when you are selecting the entry from HUD line 1202.

Description: Enter a more detailed description if necessary.

Last modified/By: The date and login name will appear here after the information has been created and saved. This will change each time there is a modification to the entry.

State: Enter the state to enable the program to filter in the applicable entries. This is particularly helpful when working in multiple states.

Counties: Enter the name of the county(ies) to which the formula is applicable. If the formula applies to all counties, leave blank. Do not add "all counties" ; it is not recognized. You can filter appropriate entries when used accordingly.

Cities: Enter the name of the city(ies) to which the formula is applicable. If the formula applies to all cities, leave blank. Do not add "all cities"; it is not recognized. You can filter appropriate entries when used accordingly.

Version: Versions are automatically numbered.

- **New Version button:** When the latest version of the table is current and the table has no "under construction" versions, selection of this button creates a numbered version of the table. The new version will be set as under construction. The version number will be increased by one.

Type: Select if formula is for a deed, mortgage/deed of trust, release or other (not used on 1202).

Description: This will auto populate based on the type selected above.

Entries Tab

Basis: Select what you would like the formula to calculate off of.

Loan: Select either first loan on HUD-1 or All loans on HUD-1.

Basis rounding: Select how you would like the basis to round.

To nearest: Select the amount you would like the basis to round to. For instance, if you would like it to round to the nearest dollar, enter 1.00. By default it will round to the nearest penny.

The **Test** button verifies the accuracy of your formula.

Result rounding: Select how you would like the result to calculate.

Fee Schedule Grid

Row Type: Options that define the display for the rest of the line. The row type indicates two row types: First Row, Next Row. First row will also be present in a Fee Schedule Grid. It cannot be deleted. It marks the start of values for the fee schedule.

- **First (per unit):** for the first set of items, the charge is based on actual number of items.
- **First (flat fee):** charge is based on the range boundary that the item falls within.
- **All (per unit):** charge is based on actual number of items. This setting will indicate that there will be no change in the rate of this schedule.
- **Flat Fee:** one charge, no matter how many items specified.

Dollars: the pages to be covered by the row type.

Charge: The value associated with setting of the row type, Dollars and Amount in Dollars. The format for this field is set based on the Fee Schedule Manager:

- **Fee Schedule:** Recording fees: 12 digits to right, and 2 digits to left of decimal.
- **Fee Schedule:** All others: 6 digits to the left and 6 digits to the right of the decimal.

Dollar(s): Dollar amount.

Add line button: Appends a new line to the end of rows of the schedule. This button is always enabled.

Remove line button: disabled whenever the first line is selected.

Make Current button: Sets the currently selected version as the active version. This button is not available if only one version exists.

Recording Fees

The information entered here will be retrieved on HUD line 1201 for recording purposes. To add a new entry, right-click on Recording Fees and select New Fee Schedule.

General Tab

Name: Enter the name of the fee schedule - this name displays when selecting the entry from HUD line 1201.

Description: Enter a more detailed description if necessary.

Last modified/By: The date and login name display after the information has been created and saved. This changes each time there is a modification to the entry.

State: Enter the state to enable the program to filter in the applicable entries. This is particularly helpful when working in multiple states.

Counties: Enter the name of the county(ies) to which formula is applicable. If it applies to all counties, leave blank. Do not add "all counties”; "all counties" is not recognized. Appropriate entries may be filtered when used accordingly.

Version: Versions are automatically numbered.

- **New Version button:** When the latest version of the table is current and the table has no "under construction" versions, selection of this button creates a numbered version of the table. The new version will be set as under construction. The version number will be increased by one.

Type: Select if formula is for a deed, mortgage/deed of trust, release or other (not used on 1201).

Description: Auto-populates based on the Type selected above.

Enable this fee schedule: Select this checkbox to activate the Fee Schedule.

Entries Tab

Add line button: Appends a new line to the end of rows of the schedule. This button is always enabled.

Remove line button: disabled whenever the first line is selected.

Result rounding: Select the method used to calculate the result.

To nearest: To add an actual formula, select + and select from the drop-down. On the first line entry, the following formulas to choices are provided:

- First (per unit)
- First (flat fee)
- All (per unit)
- Flat Fee

Once selected, enter in the applicable formula. For instance, if the first 2 pages will be at $5.00 per page, select First (per unit) and enter the first 2 pages charge $5.00 per page. To add the next line to the formula, press  to see the next group of formulas choices:

- Next (per unit)
- Next (flat fee)
- Remaining (per unit)
- Remaining (flat fee)
- Additional Fee

For instance, if the next formula is the remaining pages are $2.00 per page, select Remaining (per unit) and enter $2.00 per page.

The **Test** button verifies the accuracy of your formula. Once you are satisfied, select **Make Current** and it will prompt you to save your entry and make it current (enables users to view from HUD line 1201). You can also copy a previous entry and make the necessary changes to add additional entries in a quick manner. All entries made within the Fee Schedule Managers will be accessible for HUD lines 1204, 1205, etc.

Row Type: Options that define the display for the rest of the line. The row type indicates two row types: First Row, Next Row. First row will also be present in a Fee Schedule Grid. It cannot be deleted. It marks the start of values for the fee schedule.

- First (per unit): for the first set of items, the charge is based on actual number of items.
- First (flat fee): charge is based on the range boundary that the item falls within.
- All (per unit): charge is based on actual number of items. This setting will indicate that there will be no change in the rate of this schedule.
- Flat Fee: one charge, no matter how many items specified.

Pages: the pages to be covered by the row type.

Charge: The value associated with setting of the row type, Dollars and Amount in Dollars. The format for this field is set based on the Fee Schedule Manager:

- Fee Schedule: Recording fees: 12 digits to right, and 2 digits to left of decimal.
- Fee Schedule: All others: 6 digits to the left and 6 digits to the right of the decimal.

Pages: Pages per dollar amount.

Make Current button: Sets the currently selected version as the active version. This button is not available if only one version exists.

State Tax/Stamps

The information entered here will be retrieved on HUD line 1202 for recording purposes. To add a new entry, right-click on Recording Fees and select New Fee Schedule.

General Tab

Name: Enter the name. Keep in mind that this is what you will see when you are selecting the entry from HUD line 1202.

Description: Enter a more detailed description if necessary.

Last modified/By: The date and login name will appear here after the information has been created and saved. This will change each time there is a modification to the entry.

State: Enter the state to enable the program to filter in the applicable entries. This is particularly helpful when working in multiple states.

Counties: Enter the name of the county(ies) to which the formula is applicable. If the formula applies to all counties, leave blank. Do not add "all counties" ; it is not recognized. You can filter appropriate entries when used accordingly.

Version: Versions are automatically numbered.

- **New Version button:** When the latest version of the table is current and the table has no "under construction" versions, selection of this button creates a numbered version of the table. The new version will be set as under construction. The version number will be increased by one.

Type: Select if formula is for a deed, mortgage/deed of trust, release or other (not used on 1202).

Description: This will auto populate based on the type selected above.

Entries Tab

Basis: Select what you would like the formula to calculate off of.

Loan: Select either first loan on HUD-1 or All loans on HUD-1.

Basis rounding: Select how you would like the basis to round.

To nearest: Select the amount you would like the basis to round to. For instance, if you would like it to round to the nearest dollar, enter 1.00. By default it will round to the nearest penny.

The **Test** button verifies the accuracy of your formula.

Result rounding: Select how you would like the result to calculate.

To nearest: Select the amount you would like the basis to round to. For instance, if you would like it to round to the nearest dollar, enter 1.00. By default it will round to the nearest penny.

Fee Schedule Grid

Row Type: Options that define the display for the rest of the line. The row type indicates two row types: First Row, Next Row. First row will also be present in a Fee Schedule Grid. It cannot be deleted. It marks the start of values for the fee schedule.

- First (per unit): for the first set of items, the charge is based on actual number of items.
- First (flat fee): charge is based on the range boundary that the item falls within.
- All (per unit): charge is based on actual number of items. This setting will indicate that there will be no change in the rate of this schedule.
- Flat Fee: one charge, no matter how many items specified.

Dollars: the pages to be covered by the row type.

Charge: The value associated with setting of the row type, Dollars and Amount in Dollars. The format for this field is set based on the Fee Schedule Manager:

- Fee Schedule: Recording fees: 12 digits to right, and 2 digits to left of decimal.
- Fee Schedule: All others: 6 digits to the left and 6 digits to the right of the decimal.

Dollar(s): Dollar amount.

Add line button: Appends a new line to the end of rows of the schedule. This button is always enabled.

Remove line button: disabled whenever the first line is selected.

Make Current button: Sets the currently selected version as the active version. This button is not available if only one version exists.

Workflow

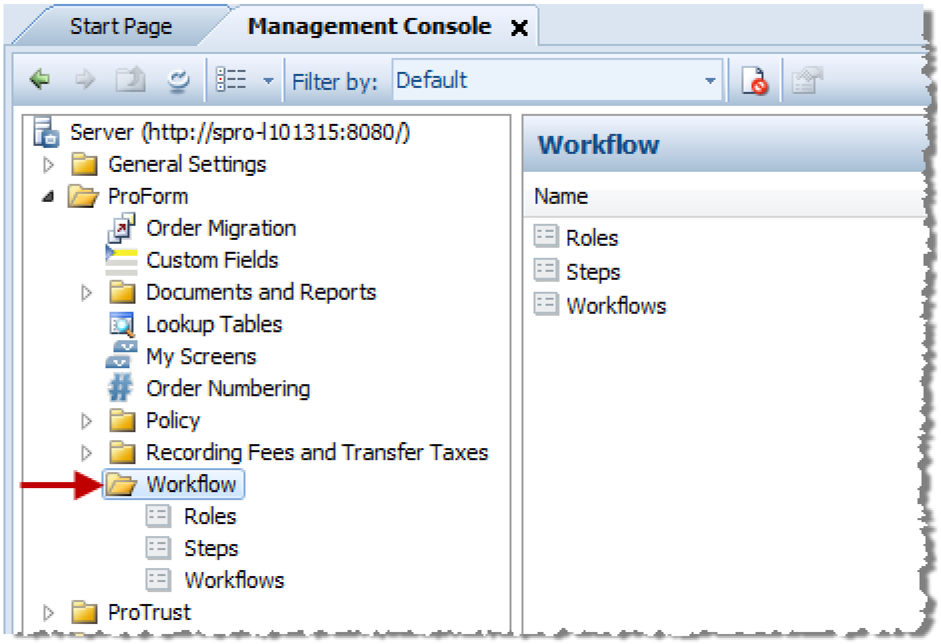
The workflow functionality in SoftPro Select provides an efficient way for managers and users to track and control various tasks and activities that occur throughout the life cycle of an order.

An organization creates a workflow by outlining the steps necessary to complete an order. Each step contains one or more specific tasks. Next, specific roles, perhaps "Abstractor" or "Closer," are defined and then assigned to each step. By assigning specific users to these roles, an organization can ensure that each step is performed according to a particular job function. Once a user completes an assigned step and its corresponding tasks, they are able to submit the order back into the workflow so that the next step may be completed.

Workflow also includes an order manager for administrators and managers. This manager provides a high-level real time view of active orders and work queues, as well as the options to assign or reassign steps to various users, depending on business needs. Several reports are available to monitor workflow productivity and status.

Setting Up a New Workflow

In order to build or edit Select Workflows, a user will need to work in several area of SPAdmin. In particular, the **Roles**, **Steps**, and **Workflows** managers will need to be configured. These managers are accessed by going to **SPAdmin > ProForm > Workflow**:

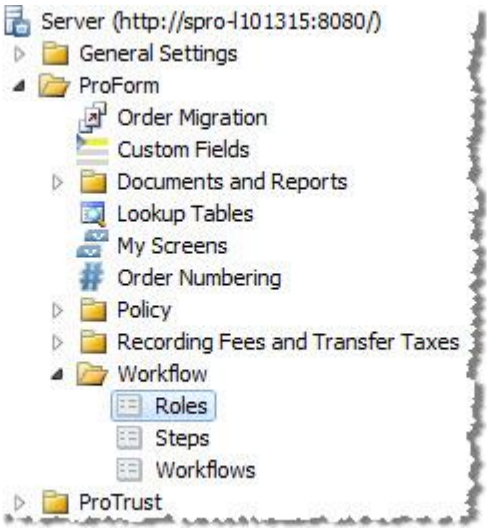


Configuring Workflow Managers

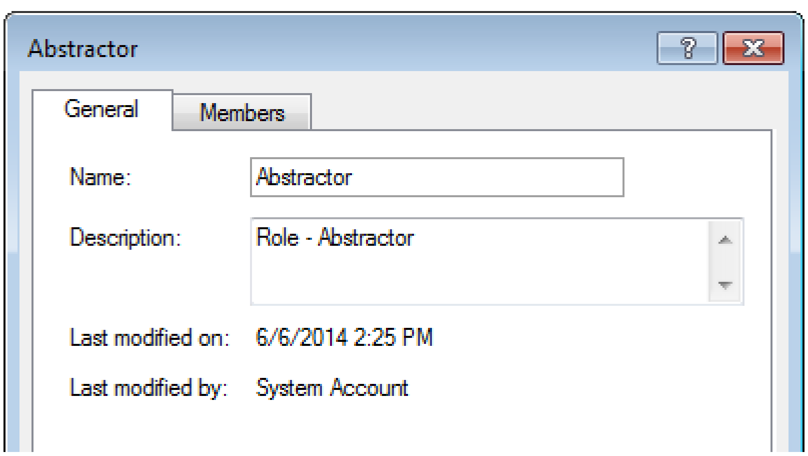
- **Roles**: Specify a type of job function. Users must be assigned one or more roles if they are to be a part of a workflow. View details.
- **Steps**: are set up sequentially to organize and facilitate an order's lifecycle from start to finish. An order may have one or many steps, and each step is likewise comprised of one or more tasks. View details.
- **Workflows**: are comprised of steps and are associated with profiles. View details.

Roles

Roles are used in Workflow and their properties can be viewed under **SPAdmin > ProForm > Workflow > Roles**.



General Tab



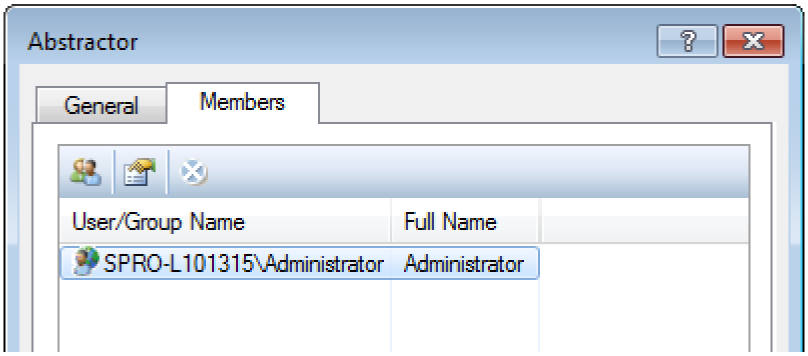
Name: When editing roles, enter a name for the role. Click **OK** to save changes.

Description: Enter a description of the role and its purpose.

Last modified on/by: The date and login name will appear here after the information has been created and saved. This will change each time there is a modification to the entry.

Enable this Role: Check to make the role active.

Members Tab



In this tab, you can assign a user as a member of the role.

The **Assign Members** dialog displays a list of users you can assign to the role. The dialog allows sorting and multi-select to assign.

Note: Only active Select users are available for assignment on the Members tab.

Properties of an assigned user may be accessed by clicking on the **Properties** button of the toolbar.

You can remove assigned members by clicking the **Remove Assignment** button on the toolbar, by shortcut key (**Alt+R**), or by using the right-click menu option.

Adding a Role

1. Go to **SPAdmin**, click on the **Managers** button and select **Roles** from the list.
2. Right-click in the **Roles** screen and select **New Role**.
3. The **New Role Properties** dialog appears. Enter the name and a description of the role.
4. Assign a user to be associated with the Role on the **Membership** tab and click **OK**.

Disabling a Role

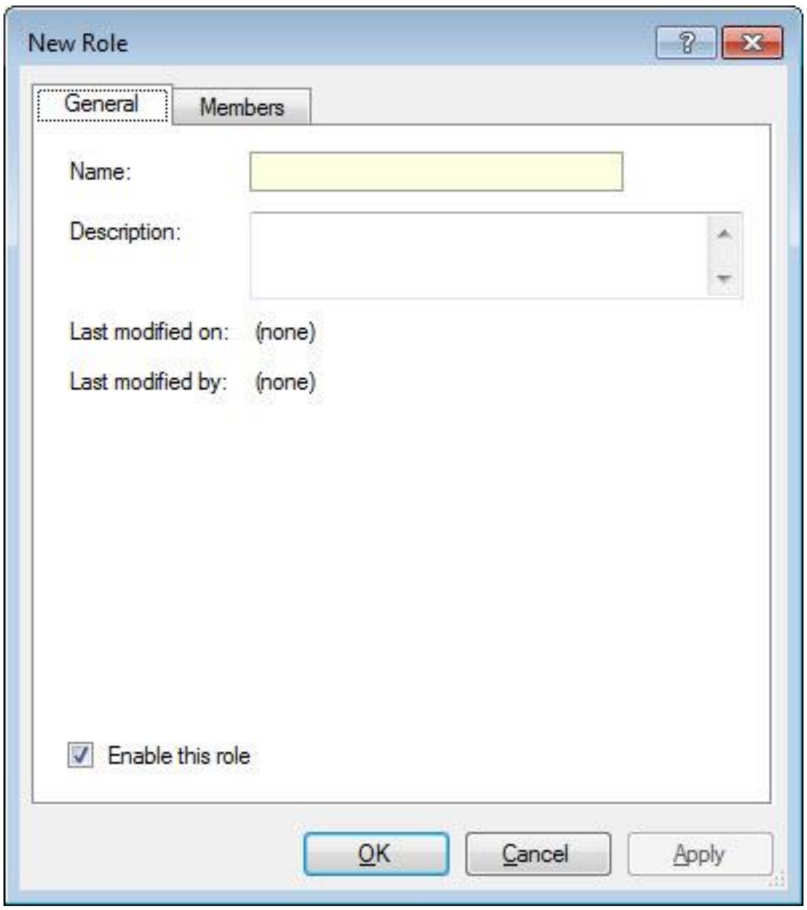
1. Go to **SPAdmin**, click on the **Managers** button and select **Roles** from the list.
2. Right-click in the role to disable and select **Disable** from the dialog.
3. A confirmation dialog appears asking for confirmation to disable this role.

4. Click **Yes** to disable or **No** to cancel out of the action.

Adding a Role

1. Click the **SPAdmin** Program Tab.

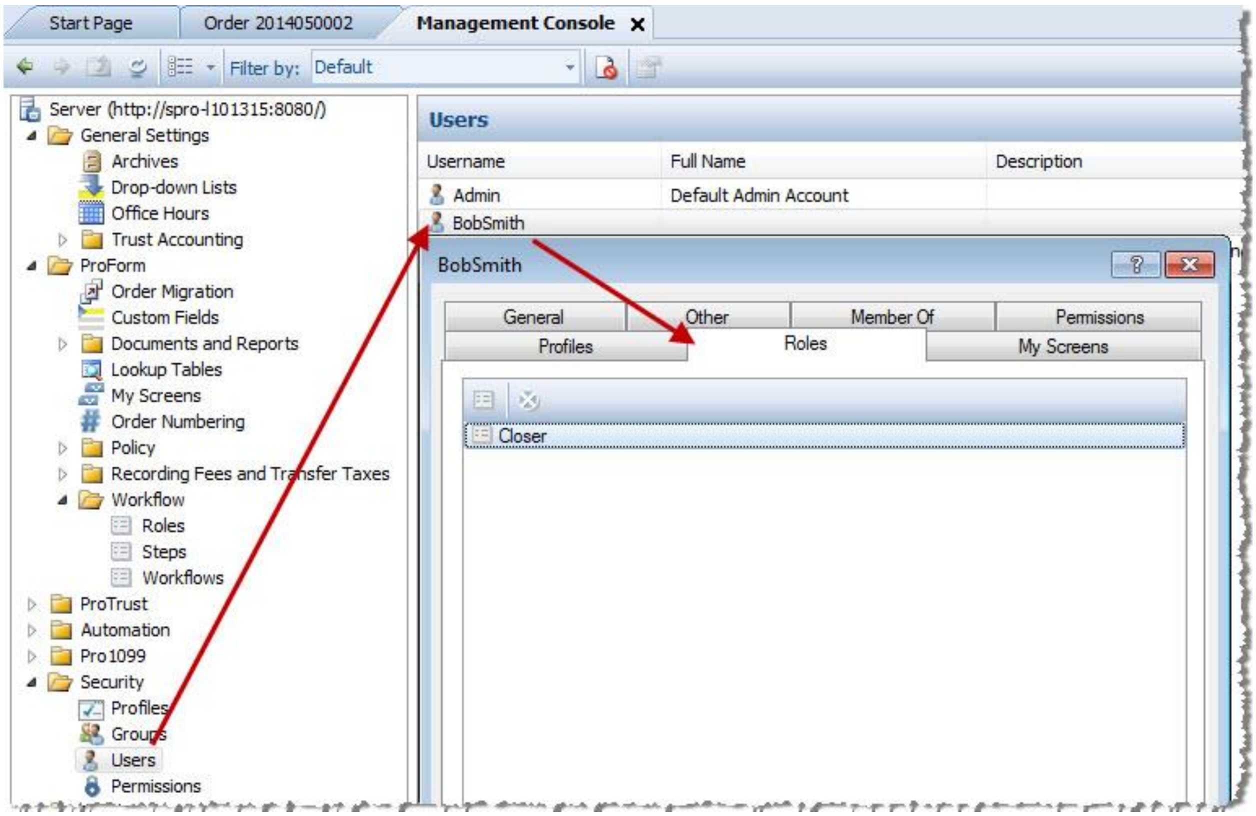
2. Go to **ProForm > Workflow > Roles**.
3. Right-click and select **New Role**.
4. The **New Role** dialog appears. Enter a name and description.



5. Click **OK**.

Editing User Roles

To view or edit user roles, select the user in SPAdmin by going to **Security > Users**. Right click on the user, select **Properties**, then select the **Roles tab**. From this tab, you can assign roles to the selected user or remove the assignment from that user.



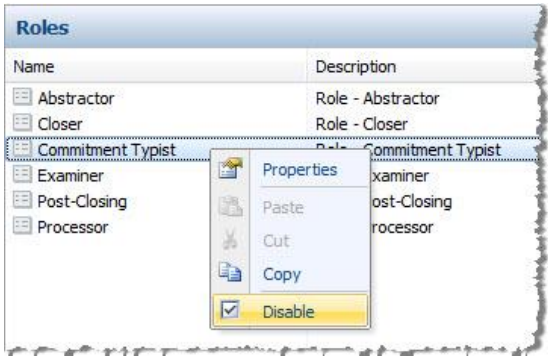
- To assign a role to the user, click the **Assign Roles** button and select one or more available roles; click **OK**.
- To role from a user, select the assigned role and click the **Remove Assignment** button.

Note: After editing user information, click **Apply** to preserve your changes.

Disabling a Role

1. Click the **SPAdmin** Program Tab.

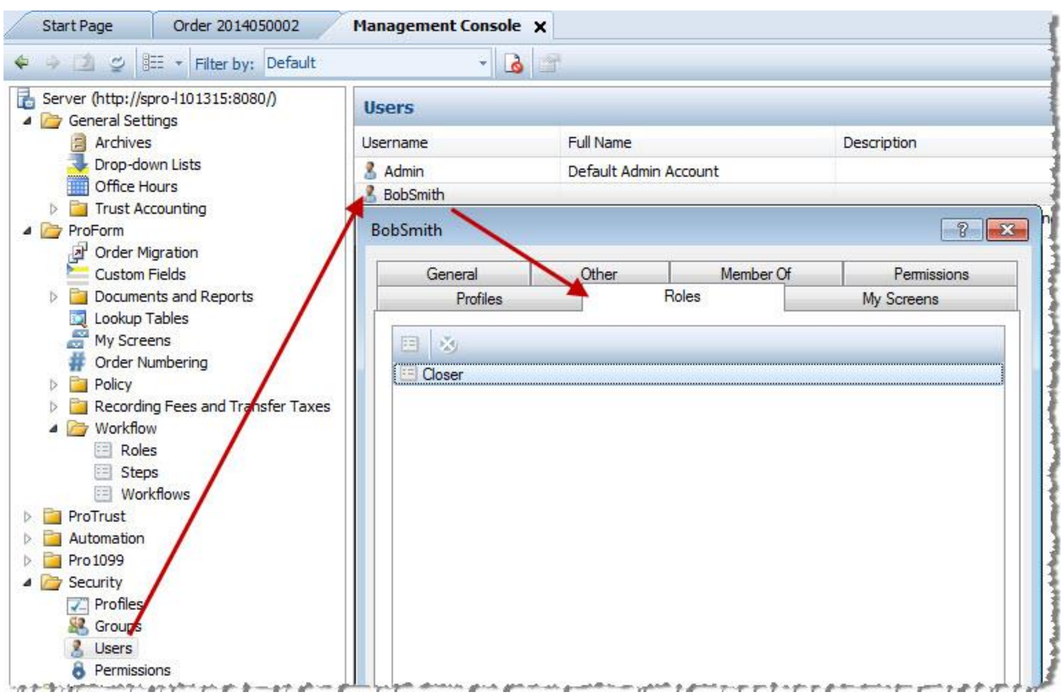
2. Go to the **ProForm > Workflow** folder.
3. Click **Roles**.
4. Right-click to select the role from the list.
5. Click **Disable** from the pop-up menu.



6. The **Disable role** confirmation dialog appears. Clicking **Yes** disables the selected role and **No** cancels the action.

Assigning Roles to Users or Groups

To assign Roles to Users or Groups, select the user in SPAdmin by going to **Security > (Users OR Groups)**. Right click on the user/group, select **Properties**, then select the **Roles tab**. From this tab, you can assign roles to the selected user or remove the assignment from that user/group.



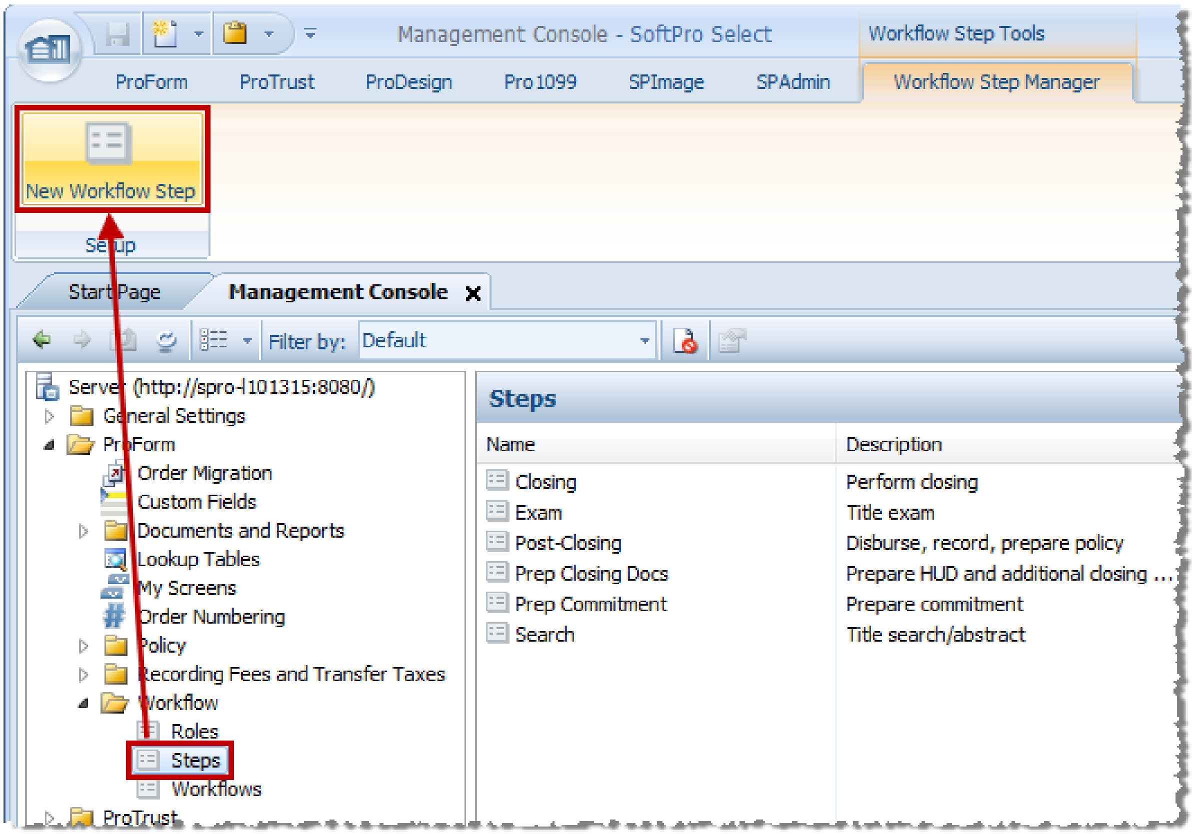
- To assign a role to the user, click the **Assign Roles** button and select one or more available roles; click **OK**.
- To remove a role, select the assigned role and click the **Remove Assignment** button.

Note: After editing user information, click **Apply** to preserve your changes.

Workflow – Steps Manager

Adding, Deleting, or Copying a Step

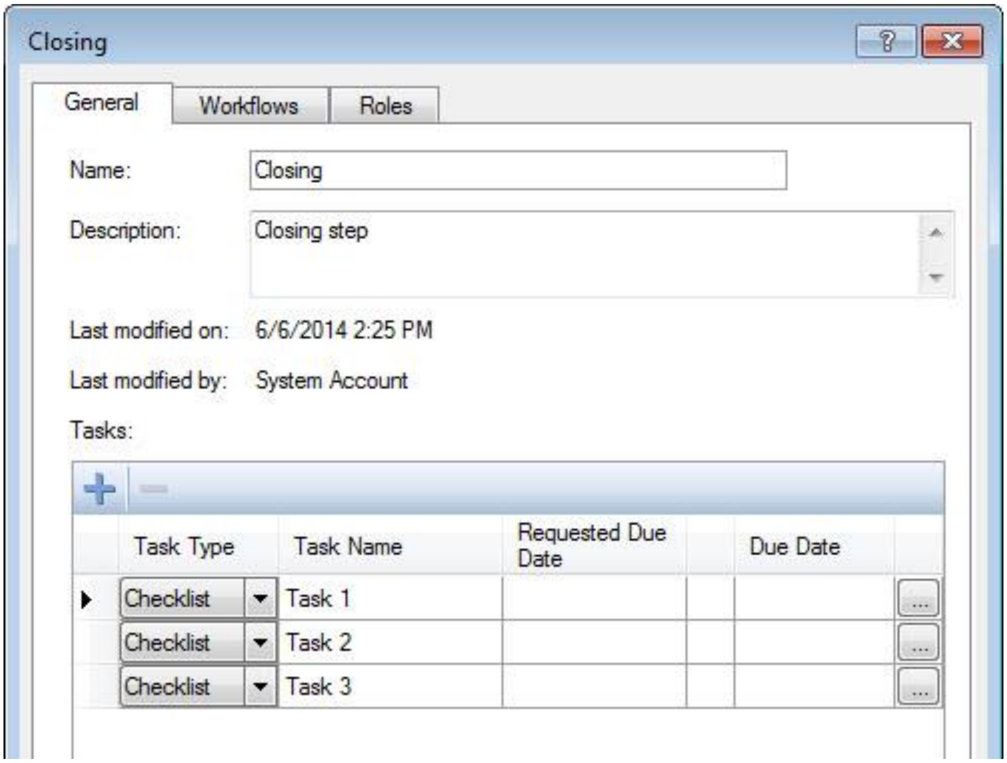
1. To **add** a step, select the **Steps Manager** and click **New Workflow Step**.



2. To **delete** a step, right click on a step and choose: **Delete**.
3. To **copy** a step, right click on a step and choose: **Copy**.

Note: When copying a step, the tasks that are associated with that step are also copied. Copying workflows will also copy the tasks associated with the steps to the new workflow.

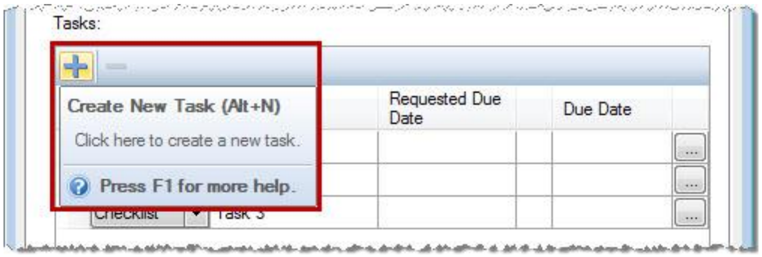
Steps - General Tab



Name: Name of the selected step. The step name cannot be the same name as another step in the same workflow. However, it can be the same name as a step in another workflow.

Step Description: Label for the selected step.

Adding Tasks to Steps: You can add several tasks for each step. To add a task to a step. Select the Add button and enter a Task Type and Task Name. For the Requested Due Date and Due Date fields, highlight the Due Date field and click the ellipses button. The Task Due Date Formula Editor appears. When the step associated with the tasks is selected from the Queue in ProForm, the tasks will be added to the order.



Task Type: Select Requested or Checklist.

Task Name: Enter a task name. This is required if either due date is specified and is required to save the task.

Requested Due Date: Requested Due is the Requested Due Date from the Requested Tasks screen.

Due Date: Due Date is both the Received Due Date from the Requested Tasks screen and the Due Date from the Checklist Tasks screen.

Delete: a task by selecting the row and pressing Delete button.

ENTERING TASKDUEDATE FORMULAS

Enter the information in the parameters. Click Clear to reset fields. Click OK to continue. The Due date fields display the formula in a text format, for example, "7 Days Before Settlement". Parameters change depending on if it is a Requested Due Date, Requested Task Received Due Date, or Checklist Task Due Date.

Steps - Workflows Tab

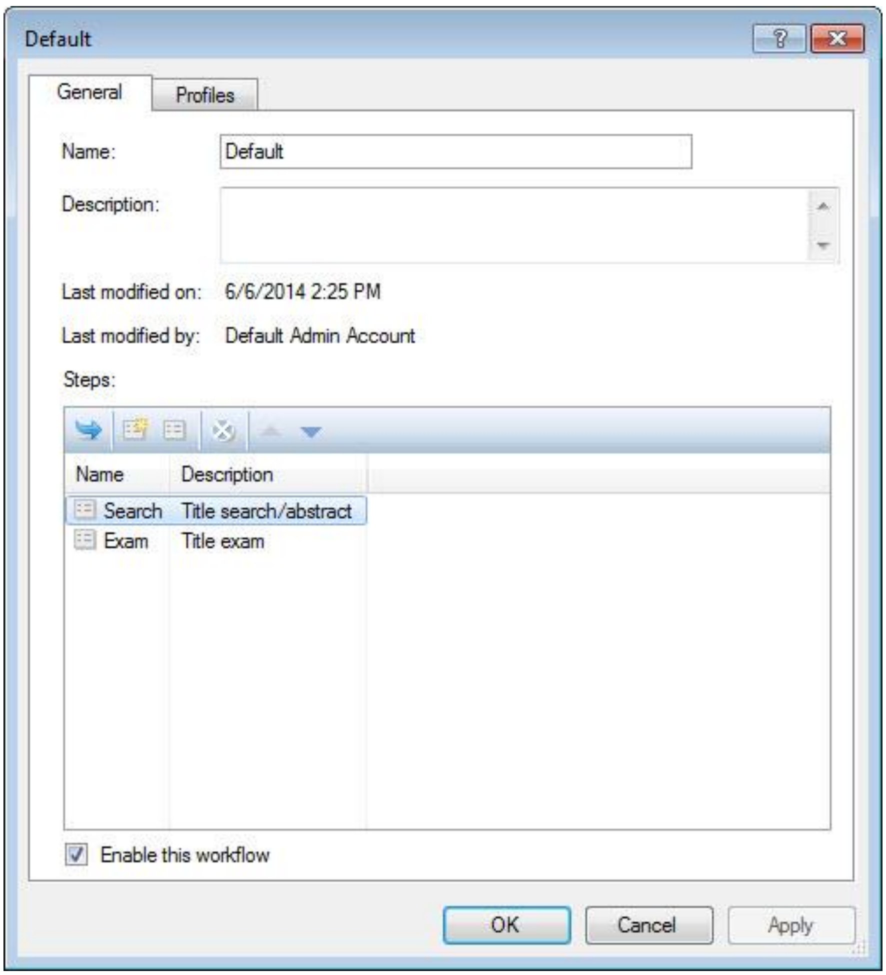
The **Workflows** tab shows all workflows that have the step assigned:

Steps - Roles Tab

Assign Roles: Choose the **Assign Roles** button (or shortcut Alt+L) to assign a role, such as Abstractor, Closer, or Examiner.

Remove Roles: Choose the **Remove Assignment** button (or shortcut Alt+R) to remove roles.

Workflow Manager - General Tab



The General tab of the workflow manager allows administrators to modify the steps, tasks, and groups associated with a workflow.

Name: Enter the name of the Workflow as you would like it to appear in the workflow manager grid.

Description: Enter a description of the workflow and its use.

Last modified on: Displays the last date and time the workflow was modified and saved.

Last modified by: Displays the last user to modify and save the workflow.

Assign Steps: Clicking this button will bring up the Assign Steps dialog and allows the administrator to add steps to the workflow.

Create New Steps: clicking this button brings up the New Workflow Step dialog allowing the administrator to assign a new name, description and associated tasks to a new step for the workflow. Once added, the option will be available in the Assign Steps dialog.

Edit Step: clicking this button brings up the Step's dialog and allows the administrator to modify the tasks associated with the steps, which workflow it is assigned to and what roles the step is available for.

Remove Step: clicking this button allows the administrator to remove the highlighted step from the workflow. - the step will remain available in the Assign Step dialog.

Move Up/Down buttons: these buttons allow the administrator to change the order in which the steps appear in the workflow

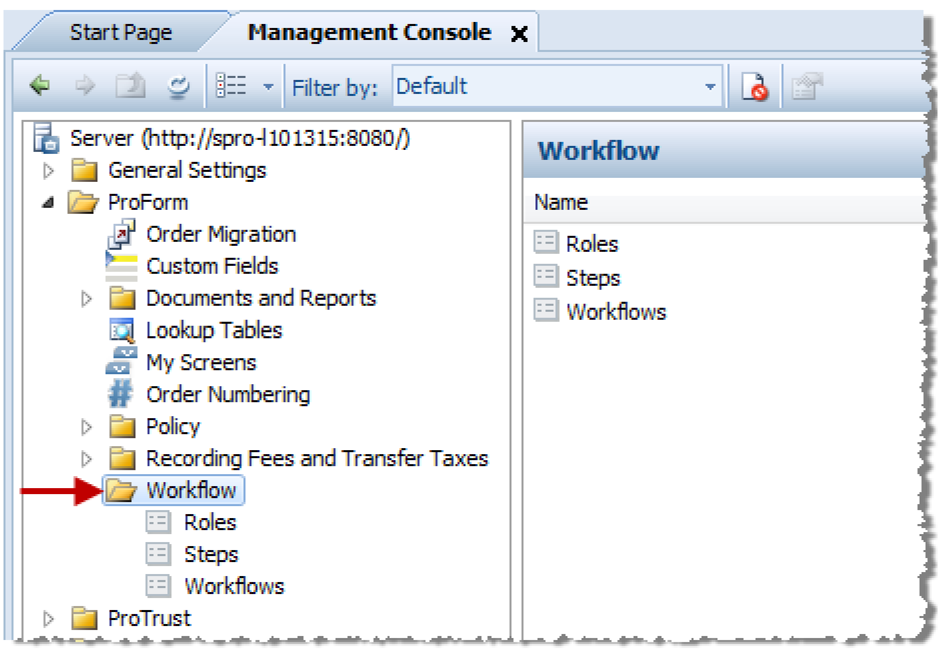
Enable this workflow: clicking this button allows the workflow to be active for the profiles assigned to it. Disabling the workflow makes that workflow unavailable for that profile but does not delete the assignment from the workflow so that if the checkbox is checked later, the original profiles assigned to that workflow will remain.

Note: To learn more about Steps, click here.

Workflow Manager - Profiles Tab

Workflow Profiles Tab; Associating Profiles

To view the Profiles tab for a **Workflow**, go to **SPAdmin > ProForm > Workflow** folder and select **Workflows**:



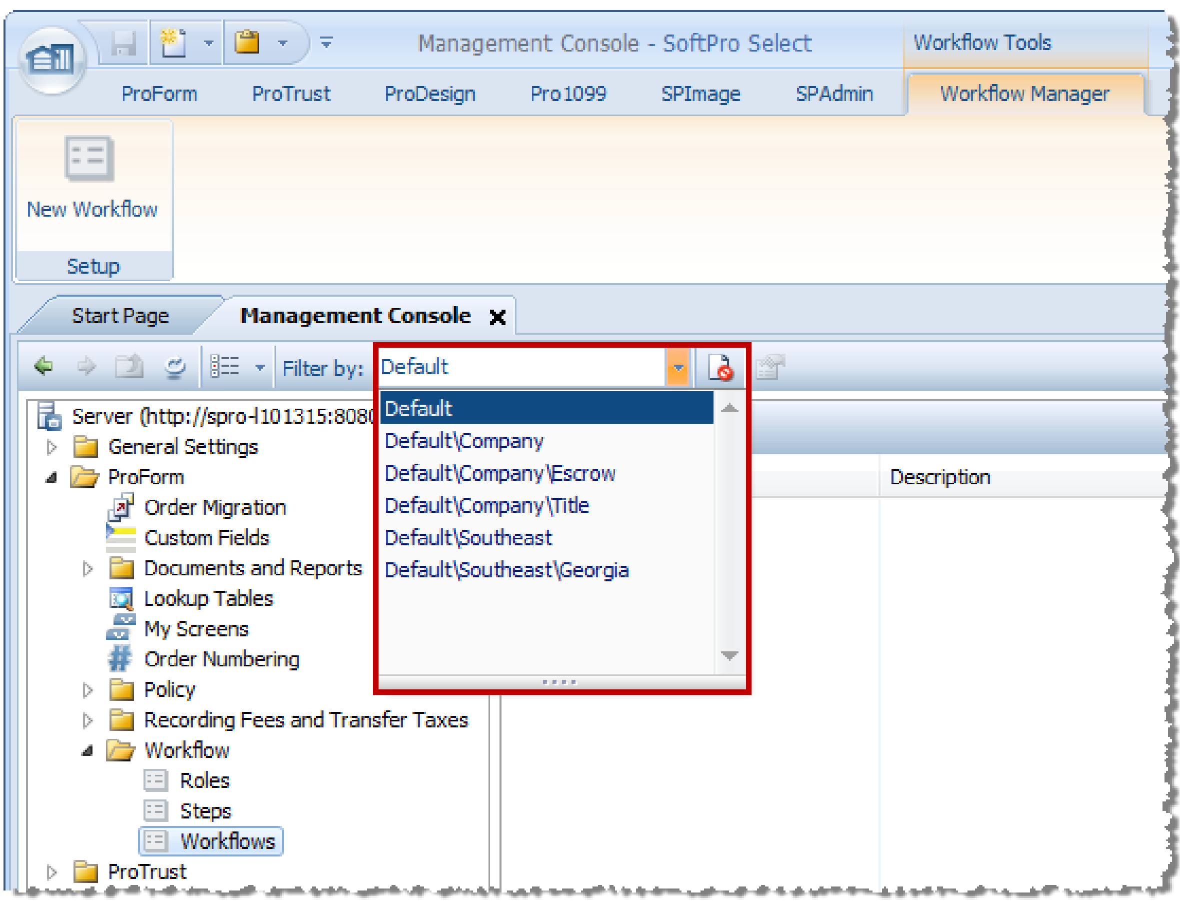
After you double click a workflow in the pane to the right, you will get this dialog:

In previous versions of SoftPro Select, workflows could not be associated with profiles. All workflows were visible to all users in the system. Workflows can now be individually associated with different profiles in the Workflow Manager by using this Profiles tab.

Filtering Profiles

As can be seen in the screen shot above, there are two tabs, General and Profiles. This tab functions exactly like all the other SPAdmin Manager Profile tabs. Profile inheritance for the Workflow Manager also works like every other Manager; if any workflows are assigned to the current profile, those are the workflows available to the user. However, if none are assigned, then the profile tree with the first parent with workflows assigned to it becomes the available workflow. If a workflow is not assigned to any profiles, the workflow does not appear as an option for users in ProForm. Like all other managers, the Workflow Manager requires unique names for each workflow.

To view the Workflow Manager profile filter, go to **SPAdmin > ProForm > Workflows** folder. The **Filter by** drop-down is enabled and defaults to “Default” profile. You can select a profile in the drop-down to filter the list of available workflows to only those associated with the selected profile.



ProTrust Reports

The ProTrust Reports manager shows all available reports stored in the database that can be added to the ProTrust Tree Manager.

General

To view the properties of a report double-click the report, click the properties button in the toolbar or right-click and select Properties from the menu.

Name: Defaults to the file name of the report (path not included and file extension removed).

Title: Defaults from the report's title. If the title is blank, the title defaults to the report's file name without the extension.

Last modified on: Stamped with the system date and time of the last imported version of that report.

Last modified by: Stamped by the current trustee user ID of the user importing the reports.

Last imported on: The date and time listed here represent the last time the document was updated in the system via a document build install or manual import.

Last imported by: Indicates the user that last imported the document via a document build install or manual import.

Report/Document: Indicates if this is a Crystal Report or a ReadyDoc.

Report type: Report types indicate the function of the report and contribute to the availability of the report within different areas of the program.

- Check
- Deposit Slip
- Disbursement Summary
- HUD Balance Summary
- Order Balance Summary
- ProTrust Report Tree
- Single Ledger Balance
- Transaction Form
- Transaction History

Category: Report categories are used to filter trees based on a user's set of permissions. If a user does not have permission to view a category, that report will be filtered from their tree view. The available report categories are:

- Accounting
- Bulk Sales
- Commercial - Escrow
- Commercial - Title
- Escrow
- Management
- Management - Escrow
- Management - Title
- Title

- Unrestricted

Edit option: The edit option applies to documents and controls the ability for a user to edit the document in preview mode based on SPAdmin permissions. The available choices are:

- Read-only
- Restricted
- Unrestricted

Protected: Determines whether or not a you can re-import a report into SoftPro Select. Protected reports cannot be edited or overwritten, regardless of permission.

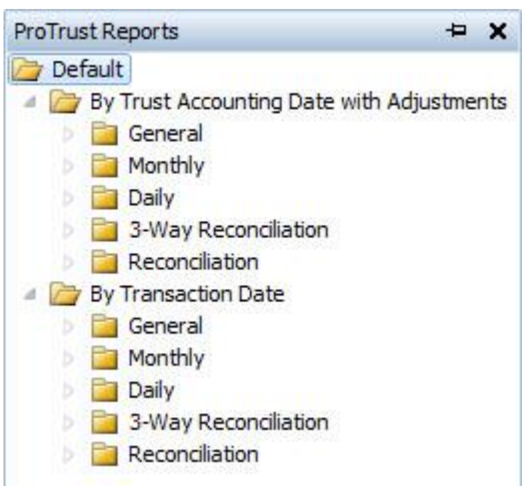
Enable this document: Check this box to make the report available for use in tree managers.

Trees

The **Trees** tab indicates the trees in the ProTrust Tree Manager to which the report has been added.

ProTrust Report Trees

The ProTrust Report Trees manager allows Administrators to arrange SoftPro and custom (as applicable) ProTrust reports to best suit the needs of the production offices. Trees can be created, copied and disabled from the main manager screen. Select comes with a **default ProTrust tree** that cannot be edited, regardless of permission. The default tree can, however, be used as a basis to create another, editable tree.



General

Name: Enter the name of the tree.

Description: Enter a brief description of the tree to assist in assignment to the appropriate profiles.

Last modified on: This field defaults to the date the manager was created, and is not editable.

Last modified by: This field defaults to the person name who created the manager, and also is not editable.

Protected: This checkbox indicates that the format of the tree cannot be altered. Trees installed by the SoftPro build engine are protected and cannot be altered by Administrators.

Enable this document tree: Unchecking this box deactivates the tree making it unavailable for use.

Tree

This tab shows the layout of the chosen tree. Right-click within the tab to **add or remove folders and reports**. Use the arrows at the top of the tab to arrange the sequence and level of the folders and individual reports to structure the tree to the desired arrangement. Available reports pull from the content in the ProTrust Reports manager.

Profiles

This tab allows administrators to assign profiles access to the selected tree. Click the **Assign Profiles** button to add Profiles to have access to the tree. To remove a profile, right-click on the desired profile and select **Remove Assignment**.

Pro1099 Reports

General Tab

Name: Displays the name of the Report file as it was saved in the database.

Title: Enter the name of the Report as it will show in the tree.

Last modified on/by: The date and login name will appear here after the ReadyDoc has been loaded and saved. This will change each time there is a modification to the manager entry.

Last imported on: The date and time listed here represent the last time the document was updated in the system via a document build install or manual import.

Last imported by: Indicates the user that last imported the document via a document build install or manual import.

Report/Document: Indicates whether the document is a ReadyDoc or a ReadyDoc report developed in Crystal Reports. Report will always be selected.

Category: Choosing a category allows administrators to restrict access to certain reports based on permissions. The available selections are:

- Accounting
- Bulk Sales
- Commercial-Escrow
- Commercial-Title
- Escrow
- Management
- Management-Escrow
- Management-Title
- Title
- Unrestricted

Edit option: This option will always be set at Read-Only.

Protected: The Protected checkbox indicates a SoftPro-created item and is not editable.

Enable this document: Unchecking this box deactivates the Report making it unavailable for use or viewing in a tree.

Trees

The Trees tab displays to which tree(s) the Report has been associated.

Pro1099 Report Trees

The Pro1099 Report Trees manager allows Administrators to arrange SoftPro and custom (as applicable) Pro1099 reports to best suit the needs of the production offices. Trees can be created, copied and disabled from the main manager screen.

General Tab

Name: Enter the name of the tree.

Description: Enter a brief description of the tree to assist in assignment to the appropriate profiles.

Last modified on: This field defaults to the date the manager was created, and is not editable.

Last modified by: This field defaults name of the user that created the manager, and also is not editable.

Protected: This checkbox indicates that the format of the tree cannot be altered. Trees installed by the SoftPro build engine are protected and cannot be altered by Administrators.

Enable this document tree: Unchecking this box deactivates the tree making it unavailable for use.

Tree

This tab shows the layout of the chosen tree. Right-click within the tab to **add or remove folders and reports**. Use the arrows at the top of the tab to arrange the sequence and level of the folders and individual reports to structure the tree to the desired configuration. Available reports pull from the content in the Pro1099 Reports manager.

Profiles

This tab allows administrators to assign profiles access to the selected tree. Click the **Assign Profiles** button to add Profiles to have access to the tree. To remove a profile, right-click on the desired profile and select **Remove Assignment**.

Roles, Profiles, Groups and Users in SPAdmin

This topic provides an overview of roles, profiles, groups and users in the SPAdmin. It will describes differences between them to better take advantage of the full management powers of SPAdmin.

Roles

In SPAdmin, roles summarize the actions and activities assigned to or required by a user. Users that share roles in SPAdmin perform like functions in your organization. The role to which a user is assigned should reflect that user’s specific job description. It will determine the types of orders that will be visible in the user's order queue. Roles are established and managed in SPAdmin.

Profiles

Profiles are the summaries of program settings that are specific to a branch or office in your organization. You may have several profiles established in SPAdmin to describe the SoftPro settings appropriate for each of your cost centers. Profiles are established and managed in SPAdmin.

For example, different branches may require access to different sets of reports. The reports used by a cost center can be one aspect of the profile created for the cost center. After creating a profile, you can add users and groups to the profile so that the users and groups can use SoftPro with the settings saved to that profile.

Users can be added to more than one profile so they can work remotely from any office and still use SoftPro with the settings assigned to a specific cost center. Users can switch between profiles if assigned to more than one. See Editing User Profiles.

Groups

Users can be added to groups. Groups may also be added to other groups. Groups are collections of users that share similar permissions. Users added to a group will inherit the permissions granted to the group. A user can belong to multiple groups. Groups are established and managed in SPAdmin.

A good way to implement SPAdmin permissions is to create groups and set up group permissions first. Then as Administrators add users they can assign them to groups to grant them permissions.

Note: Administrators can adjust the permissions of single users to differ from the set of permissions inherited from a group. However, a user cannot be granted permission to access a feature that is denied by any group to which the user belongs.

Users

Users are the people in your organization that access SoftPro to work. Each user should be added to SPAdmin so that access to SoftPro can be defined and controlled. After adding a user to SPAdmin, Administrators can add the user to groups that give them permissions to the set of SoftPro features they need, or Administrators can customize a user's permissions outside of a group. Users can also be assigned to workflow **roles** and **profiles** in your organization.

Profiles - General Tab

Profiles associate preferences with a user and determine which orders they can view. Profiles grant a user access to relevant information. General profile information:

- **Preferences:** Various user references and data visibility or access settings for each profile
- **Membership:** Lists users assigned to a particular profile
- **Default:** Assigns users to a default profile

In order to create orders, users must be a member of at least one profile that contains an order numbering format. In addition, appropriate SoftPro permissions need to be granted to each user based upon what they are required to do in the program.

There are eight tabs associated with a profile: **General, Other, Order, HUD, Accounting, 1099, Members and Classic Connections.**

Location Options

Name: Enter the profile name. Profile names can be edited; duplicate profile names are allowed in different branches.

Company code: Enter the code assigned to the company for this location.

Profit center: Enter the profit center ID for this location.

Cost center: Enter the cost center ID for this location.

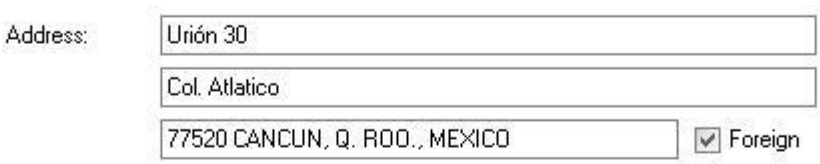
Address/City/State/Zip: Use these fields for the street address, city, state and ZIP code of the seller.

Foreign address: Check if this is a foreign address.

Foreign address (text box): Enter the foreign address. For example, if the address is:

Sra. Otilia Ramos Perez
Urión 30
Col. Atlatilco
77520 CANCUN, Q. ROO
MEXICO

Check the **Foreign** checkbox and enter the address as follows:



Additional address, City/State/Zip, and Foreign: Use these fields for an additional address if necessary.

Logo

Logo image: The Logo image field is used to insert the contact's logo to appear on documents. This applies to Settlement Agents, Title Companies, and Underwriters.

Browse	Browse for an image file to insert.
View	View the logo image in a larger viewer.
Clear	Clear the image.

Profiles - Other Tab

Last modified on: This field defaults to the date the manager was created, and is not editable.

Last modified by: This field defaults to name of the user that created the manager, and also is not editable.

Data visibility: Displays orders (depending upon permission) when searching and reporting.

Data access filter: Displays the orders the profiles users can open.

Orders created as: Indicates how the order's profile ID is stamped when the order is created. When a user creates a new order, the system identifies the user's current profile. It looks at the "Orders created by" setting of that profile. The order is stamped with the profile ID of the profile in the setting. This is necessary so orders can be stamped with the branch's profile ID if child branch profiles are needed for preference reasons (i.e.: commercial and residential departments need different order number managers.)

As these settings are related, they are validated as follows:

- **Orders created as** must be the same as or a child of the **data access filter**.
- The **data access filter** must be the same as or a child of the **visibility filter**.

Workflow

Enable workflow: Check to activate workflow capabilities.

Require notes for N/A status when submitting to workflow: xxxxx

Automatic Save/Exit Options

Auto-save order at creation: Check to automatically save orders upon creation of an order.

SPImage preferences

Barcode cover sheet: Select a cover sheet to be used as the default cover sheet with scanned documents, attachments or published documents.

Profiles - Order Tab

Default template fields (CDF/HUD-1): The two fields at the top of this tab allow the user to enter the paths to their default ProForm template(s). Different templates may be specified for both CDF and HUD-1 orders. Typically, these templates contains standard information for different underwriters, closing types, or other standard orders that can be copied over orders to improve efficiency. Default templates are copied to all new orders unless the user that is creating an order chooses another template.

Default Settlement Type: This option allows users to specify a default settlement type on the **New Order** dialog. The default is HUD-1; the settlement type can still be changed on the New Order dialog.

Show

Sales tax: When checked, on the Underwriter, Title Company and Settlement Agent order contact, a sales reporting section appears to allow set up of the tax rate percentage and also a choice of a) tax is included in HUD-1 amount or b) calculate total tax on line (and Check the HUD line). On the HUD lines 1100, 1200 and 1300 a taxable box appears to be checked as well. This box must be checked and the order contact code must be either U, T or A for the calculation to appear.

Escrow Instructions: Check to display the Escrow Instructions screen in ProForm. This appears under the Escrow/Closing section.

Bill codes: Check to display the bill code option.

- **Require bill codes on invoice lines:** Check to require bill codes on invoice line when the invoice status is changed to sent.
- **Require bill codes for revenue contacts:** Check to require bill codes for revenue contacts.

Policy instructions: Check to display the Policy Instructions screen in the Title screens section of ProForm.

Preliminary and final title opinion: Check to display these screens in the Title screens section of ProForm.

"To:" instead of "Through" for prorations: This setting controls how tax prorations are calculated and displayed.

Default data

BUYER/SELLER RELATIONSHIPS

- **Female:** Text entered here appears by default in the first Buyer and Seller Relationship fields when "Female" is entered in the Type field.
- **Male:** Text entered here appears by default in the first Buyer and Seller Relationship fields when "Male" is entered in the Type field.
- **Joint:** Enter the default text in the first Relationship field when the buyer or seller type is plural. Enter the default text in the second Relationship field when the buyer or seller type is joint.

TITLE

- **Title numbering scheme:** Select Letters, Numbers or Roman Numerals from the drop-down to specify how the numbering scheme defaults for requirements and exceptions on the Commitment - Schedules B1, B2 and Policy - Schedules B1, B2. If you select a numbering scheme, the selected scheme applies to any new commitments or policies.
- **Commitment revision:** Selection of Numbers or Letters will determine which is used when you increment the revision Commitment Schedule A.
- **Default payee (CDF orders):** Allows users to specify the default payee for title fees originating from Title Insurance Premiums, Endorsements, & Additional Title Charges. This payee is also used to determine Sales Tax.

Advanced Preferences

SHOW

Divert fees: If this preference is checked, this field will be visible on the following contact screens: attorney, escrow company, government, other, settlement agent and title company.

CEMA Screen: Select to display the Consolidation, Extension and Modification Agreement screen. This appears under the Loan tab.

Property parcel grid: Check to have this grid appear on the Property screen.

West Coast-specific: Selecting this option displays a **Borrower Signing Date** and **Seller Signing Date** field on the Order Information screen, **Send Tax Statements To** field on the Notary & Acknowledgment screen and **Additional description** fields for each HUD line. These are used typically in California.

Commitment Schedule D (TLTA): Check to make this screen and the Guaranty Fee snap section available in the Title screens section in ProForm.

Recoupment Fee: Check to make the Recoupment Fee available on the Title Insurance Premiums screen in ProForm.

Short proration option for taxes: Select this option to allow proration of taxes to begin at a date different than the current tax period proration date. This option is provided primarily for Ohio. If a current tax period proration date is not entered, the use short proration start date is blank. Once a current tax period proration date is entered, if it is less than

07/08, then 01/08 defaults in this field. If greater than or equal to 07/08 then 07/08 defaults in this field. The date can b e overwritten.

DEFAULT DATA

Copy commitment countersignature to policy countersignature: Check to copy the commitment countersignature to the policy countersignature automatically.

Round prior policy age: This setting rounds the age of the policy up or down.

Profiles - HUD Tab

HUD-1/HUD1 A Payee Defaults

1986

- **Lines 1101-1107:** HUD-1 to defaults to use the first order contact in the order associated with the contact type selected in SPAdmin. Use the drop-down list to select what order contact the1101-1107 HUD-lines should default to for this profile.
- **Lines 1108-1199:** HUD-1 to defaults to use the first order contact in the order associated with the contact type selected in SPAdmin. Use the drop-down list to select what order contact the 1108-1199 HUD-lines should default to for this profile.
- **Lines 1201-1299:** HUD-1 to defaults to use the first order contact in the order associated with the contact type selected in SPAdmin. Use the drop-down list to select what order contact the 1201-1299 HUD-lines should default to for this profile.

2009

- **Lines 1101-1104, 1107:** HUD-1 to in GFE files defaults to use the first order contact in the order associated with the contact type selected in SPAdmin. Use the drop-down list to select what order contact the 1101-1104 and 1107 HUD-lines should default to for this profile.
- **Lines 1109-1199:** HUD-1 to in GFE files defaults to use the first order contact in the order associated with the contact type selected in SPAdmin. Use the drop-down list to select what order contact the 1109-1199 HUD-lines should default to for this profile.
- **Line 1201-1299:** HUD-1 to in GFE files defaults to use the first order contact in the order associated with the contact type selected in SPAdmin. Use the drop-down list to select what order contact the 1201-1299 HUD-lines should default to for this profile.

Allow HUD RESPA-regulated descriptions to be changed

800 section, 900 section, 1000 section, 1100 section, 1200 section,1300 section or Taxes: Check one of the following: *Never*, *Commercial loan or cash sale only,* or *Always*.

Profiles - Accounting Tab

Register/Ledger

Use ProForm-generated transactions: Entries made on the HUD carries over into ProTrust automatically. If this is turned off, you may generate or edit transactions. Users may wish to turn off this option if working with commercial orders and/or split closings.

Automatic close of escrow: "**Unchecked**" is the default option. Checking this option automatically changes the escrow status of a ProForm order to "**closed**" once the following conditions apply:

- Must be a ProForm order, not a ProForm template
- Order balance total = $0.00
- Ledger balance total = $0.00
- IBA balance total = $0.00
- The ledger has at least one posted receipt and one posted disbursement (prevents auto-close of an order that has been started and does not have any amounts entered yet)
- All receipts have a posted or voided status in the register (not pending)
- All disbursements have a posted, voided or "stop payment" status in the register (not pending or held)
- Escrow status is *blank*, *in process* or *hold*
- Order status is *blank*, *in process*, *hold* or *completed*

Automatic lock of escrow: "**Unchecked**" is the default option. Checking this option automatically changes the escrow lock status of a ProForm order to "**locked**" (meaning that all ProForm fields that affect Escrow/Closing become read-only) once the following conditions apply:

- Order balance total = $0.00
- Order status = *blank*, *in process, hold* or *completed*
- Escrow status = *blank*, *in process*, *closed* or *hold*
- All anticipated receipts have a status of *posted* or *voided*
- All disbursements have a status of *posted*, *voided* or *stop payment*
- Ledger balance total = $0.00

Lock registers when escrow locked: "**Unchecked**" is the default option. Checking this option disables specific ProForm register fields and/or functions when the escrow lock status is locked. This prevents the ledger balance from changing in an escrow locked order.

Default "Auto-print transaction form" option: If this checkbox is checked, the transaction form automatically prints after clicking **OK**. If the checkbox is unchecked, the transaction is saved as usual.

Construction Draws

Require contract amounts: Unchecked is the default option. Checking this option will require contract amounts for draw approval.

Require tax IDs: Unchecked is the default option. Checking this option will require tax IDs for draw approval.

Require $0 balance for approval: Checked is the default option. Unchecking this option will allow a draw to be approved even if it is not at $0 balance.

Required Fields

Require trust account code on new order: By default, this option is **unchecked**. If this option is checked, a trust account code must be entered when creating a new order.

Require "Medium" field on transactions: Users can make the Medium field a required field when adding a transaction. Select **Require Medium** field on transactions. A warning message appears if the Medium field is left blank. Customize the drop-down list by entering choices in the SPAdmin-Drop-Down –Look for Medium field. Add/Delete choices on the right hand side under List values. You must have permission to do so.

Require account number on new IBAs: Check this option to require the account number

Require payee address on checks: Check this option to require the payee address before printing checks. Unchecked is the default option.

Reconciliation

Reconcile using trust accounting dates: Check this option to reconcile using the trust accounting date instead of the disbursement date.

Disable "Complete Reconciliation" buttons until cleared balance matches statement ending balance: Checking this option will not allow users to complete the reconciliation process until the cleared balance matches the statement ending balance.

Show grouped deposits only: Checking this box hides receipts not included in a group deposit.

Advanced Preferences

RECONCILIATION

Group Deposits "In transit": Check this option to view the **In Transit** field in the Deposit Details section on the Group Deposits screen.

Enter anticipated wires on register: Check this option to enable the Anticipated Wires function in the Register in ProForm.

REPORTS

Single ledger balance: Select the file to serve as the Single Ledger Balance report for this profile. (This option enables administrators to utilize custom reports for different profiles, if applicable.)

Disbursement summary (CDF): Select the file to serve as the CDF Disbursement Summary report for this profile. (This option enables administrators to utilize custom reports for different profiles, if applicable.)

Disbursement summary (HUD-1): Select the file to serve as the HUD-1 Disbursement Summary report for this profile. (This option enables administrators to utilize custom reports for different profiles, if applicable.)

Order balance sheet (CDF): Select the file to serve as the CDF Order Balance Sheet report for this profile. (This option enables administrators to utilize custom reports for different profiles, if applicable.)

Order balance sheet (HUD-1): Select the file to serve as the HUD-1 Order Balance Sheet report for this profile. (This option enables administrators to utilize custom reports for different profiles, if applicable.)

Transaction form: Select the file to serve as the Transaction Form for this profile. (This option enables administrators to utilize custom reports for different profiles, if applicable.)

Transaction history: Select the file to serve as the Transaction report for this profile. (This option enables administrators to utilize custom reports for different profiles, if applicable.)

Profiles - 1099 Tab

Payer Information

Payer name: Enter the name of the payer whose TIN appears in positions 12-20 of the "A" record. Any extraneous information must be deleted. Filers should not enter a transfer agent's name in this field. Any transfer agent's name should appear in the Second Payer Name Line field.

Name line 2: If more space is required for the name, use the Name Line 2 field. The use of the business name is optional in the Name Line 2 field. A dash (-) and an ampersand (&) are the only acceptable special characters for the name lines.

Tax ID Number: Enter the tax ID number (TIN - 9-digit EIN/SSN).

Name control: The Payer Name Control can be obtained only from the mail label on the Package 1099 that is mailed on most payers in December. Package 1099 contains Form 7018-C, Order Blank for Forms, and the mail label on the package contains a four-character name control.

If a Package 1099 has not been received, determine your name control using the following simple rules or leave the field blank. For a business, use the first four significant characters of the business name. Disregard the word "the" when it is the first word of the name, unless there are only two words in the name. A dash (-) and an ampersand (&) are the only acceptable characters. Names of less than four characters should be left-justified, filling the unused position with blanks.

TCC: The TCC (Transmitter Control Code) is required by the IRS before a file can be submitted electronically via the IRS FIRE System. Pro1099 requires the TCC number to be entered on the Transmitter/Payer Information screen. The transmitter's other contact information is also required on this screen.

To receive a TCC number, download Form 4419 from the IRS Website and submit it according to the IRS instructions. The IRS requests that Form 4419 be submitted at least 30 days prior to the due date for the current year's return (see Pub. 1220). The TCC number is received from the IRS by mail or return fax. To request paper forms and publications, call the IRS at 1-800-TAX-FORM (1-800-829-3676).

Contact name: Required. Enter the name of the person to be contacted if IRS/ECC-MTB encounters problems with the file or transmission.

Phone number: Required. Enter the telephone number of the person to contact regarding electronic files. **NOTE:** If the foreign checkbox is checked, the field's format changes slightly to accommodate a foreign phone number (the area code parentheses and dash are removed and the field extends to 20 characters.)

Phone extension: Enter the extension of the person to contact regarding electronic files.

Email address: Required if available. Enter the E-mail address of the person to contact regarding electronic files. If no E-mail address is available, leave blank.

Company name: Required. Enter the name of the company to be associated with the address where correspondence should be sent.

Name line 2: Enter any additional part of the name of the company where correspondence should be sent.

Mailing address/City/State/Zip:

Foreign address: Check if this is a foreign address.

Foreign address (text box): Enter the foreign address. For example, if the address is:

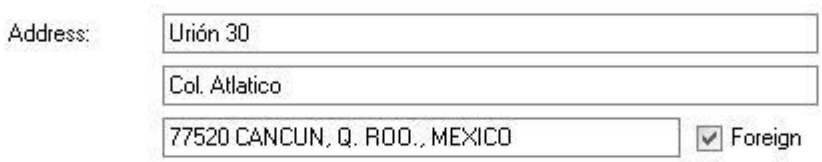
Sra. Otilia Ramos Perez
Urión 30

Col. Atlatilco

77520 CANCUN, Q. ROO

MEXICO

Check the **Foreign** checkbox and enter the address as follows:



Additional address, City/State/Zip, and Foreign: Use these fields for an additional address, if necessary.

Options

Export only escrow "closed orders": defaults to unchecked.

Payer functions as transmitter: Check if the payer is also the transmitter. When the box un-checked, the transmitter information becomes available. **NOTE:** If the payer functions as the transmitter, then only the payer information section needs to be completed.

Display TCC warning: Check to prompt a reminder that a required TCC has not been entered.

Special Indicators

Service bureau: Check to indicate if an agency will produce or submit files for electronic filing.

Last time filing: Check if this is the last year this payer name and TIN will file information returns.

Transmitter Fields

Payer name: Enter the name of the transmitter in the manner in which is it used in normal business.

Name line 2: If more space is required for the name, use the Name Line 2 field.

Tax ID number: Enter the tax ID number (TIN - 9-digit EN/SSN).

Contact name: Required. Enter the name of the person to be contacted if IRS/ECC-MTB encounters problems with the file or transmission.

Phone number: Required. Enter the telephone number of the person to contact regarding electronic files. **NOTE:** If the foreign checkbox is checked, the field's format changes slightly to accommodate a foreign phone number (the area code parentheses and dash are removed and the field extends to 20 characters.)

Phone extension: Enter the extension of the person to contact regarding electronic files.

Email address: Required if available. Enter the E-mail address of the person to contact regarding electronic files. If no E-mail address is available, leave blank.

Company name: Required. Enter the name of the company to be associated with the address where correspondence should be sent.

Name line 2: Enter any additional part of the name of the company where correspondence should be sent.

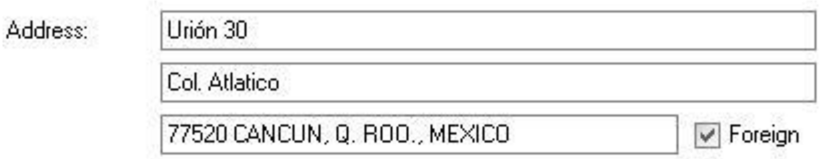
Mailing address/City/State/Zip:

Foreign address: Check if this is a foreign address.

Foreign address (text box): Enter the foreign address. For example, if the address is:

Sra. Otilia Ramos Perez
Urión 30
Col. Atlatilco
77520 CANCUN, Q. ROO
MEXICO

Check the **Foreign** checkbox and enter the address as follows:

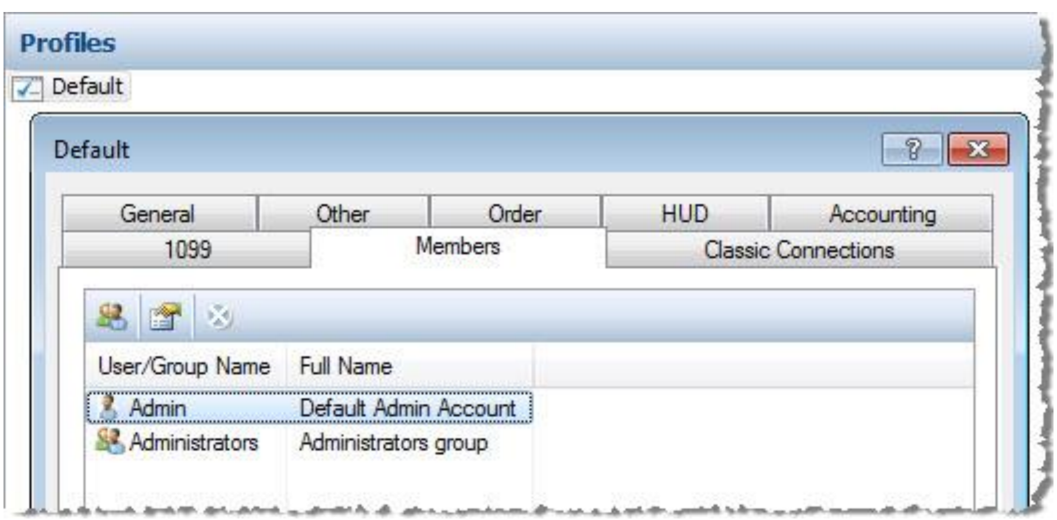


Additional address, City/State/Zip, and Foreign: Use these fields for an additional address, if necessary.

Profiles - Members Tab

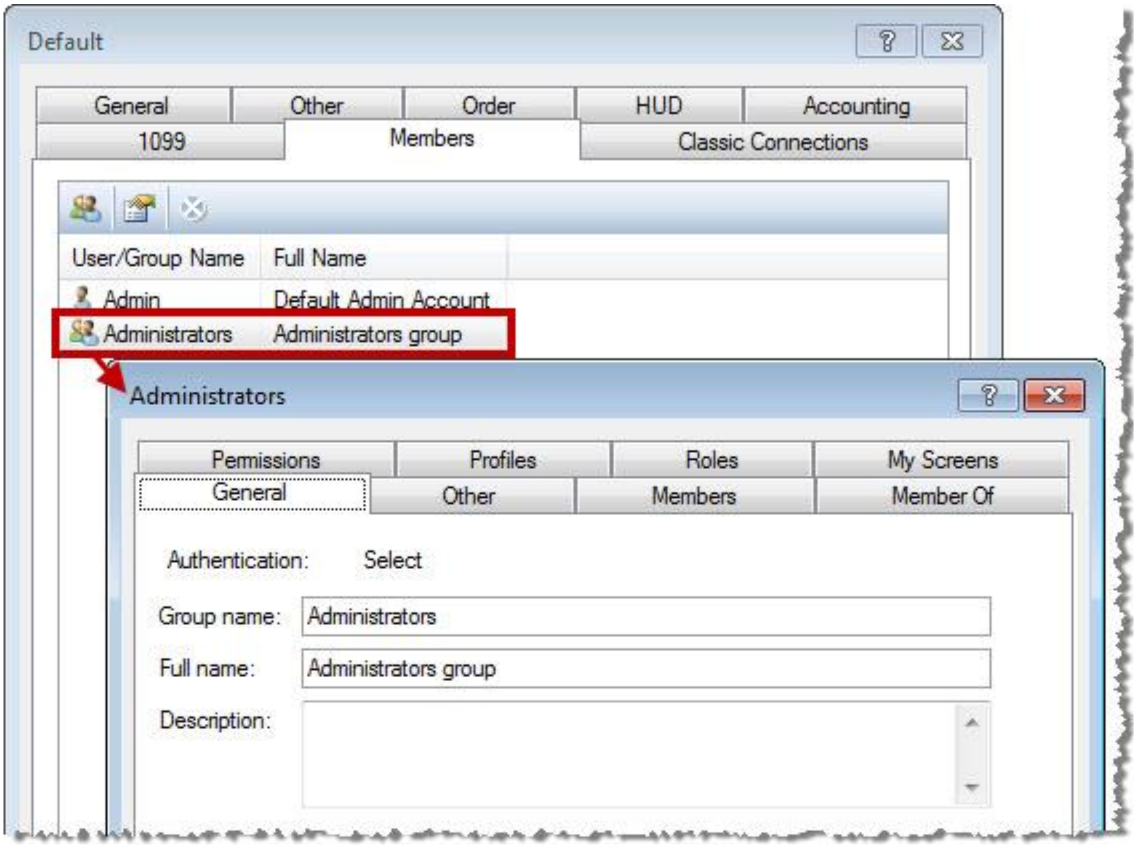
The Members tab lists users that are assigned to a particular profile. In order for a user to create orders, they must be a member of at least one profile that contains an order numbering format. In addition, appropriate SoftPro permissions need to be granted to each user based upon what they are required to do in the program.

Profiles



Click **SPAdmin**, **Profiles**, highlight a profile, then the **Members** tab. The list of current members appears in the **Available users** list.

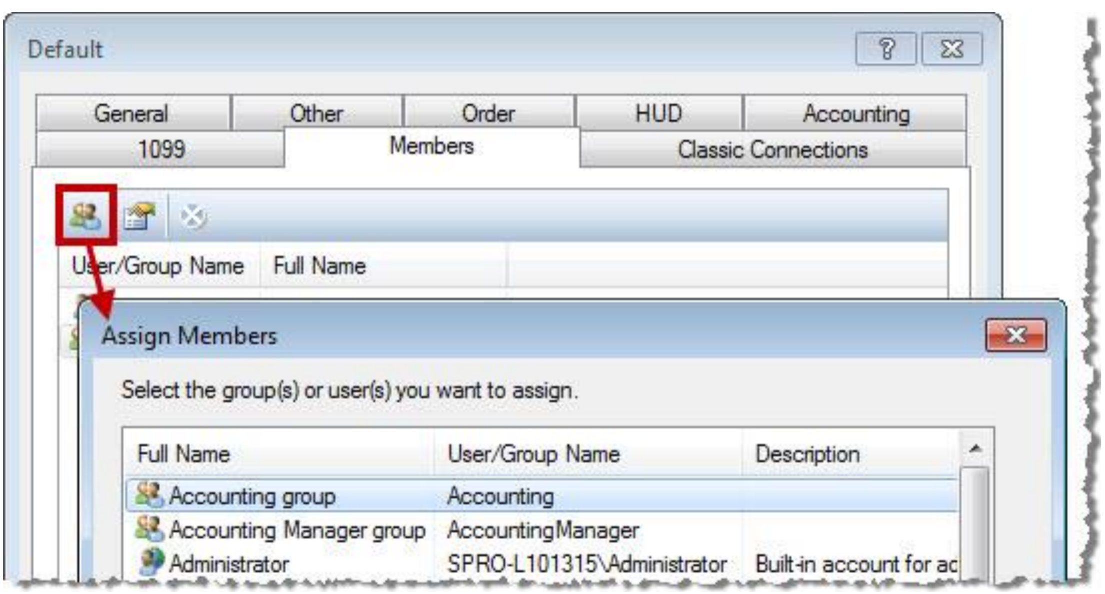
Available users



To view Properties such as the user name, full name description, whether or not the profile is active or inactive and the login type (custom or Windows), double-click on the desired member.

Assigned users

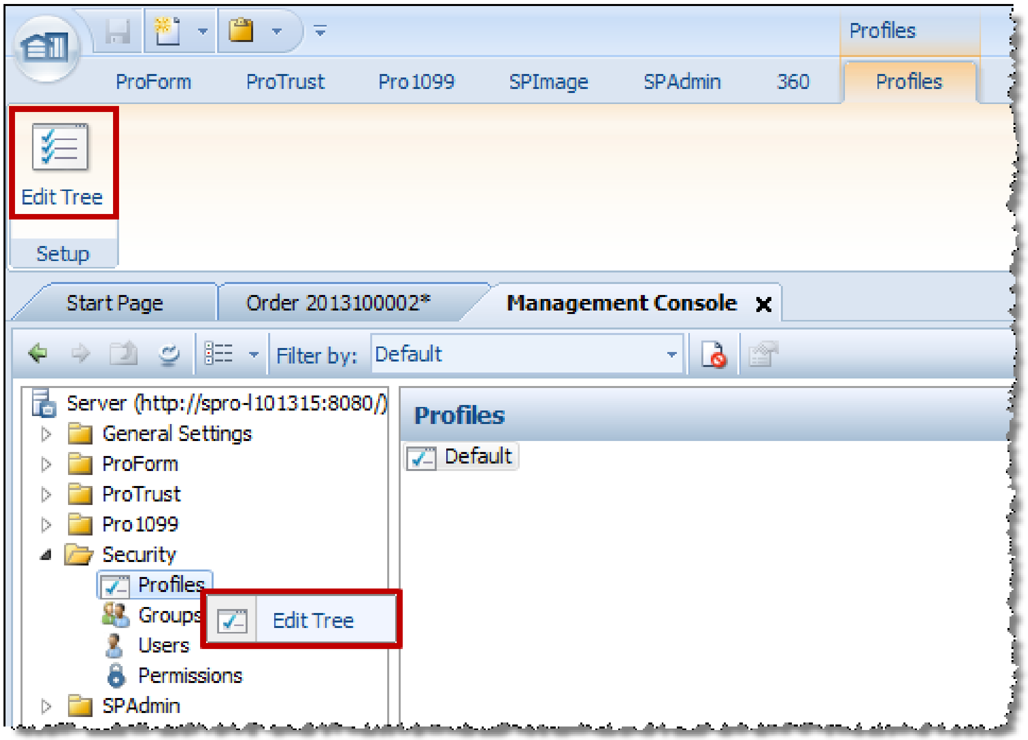
Click the Assign Membership icon or press **Alt+M** to produce the Assign Members dialog and assign members to the selected profile:



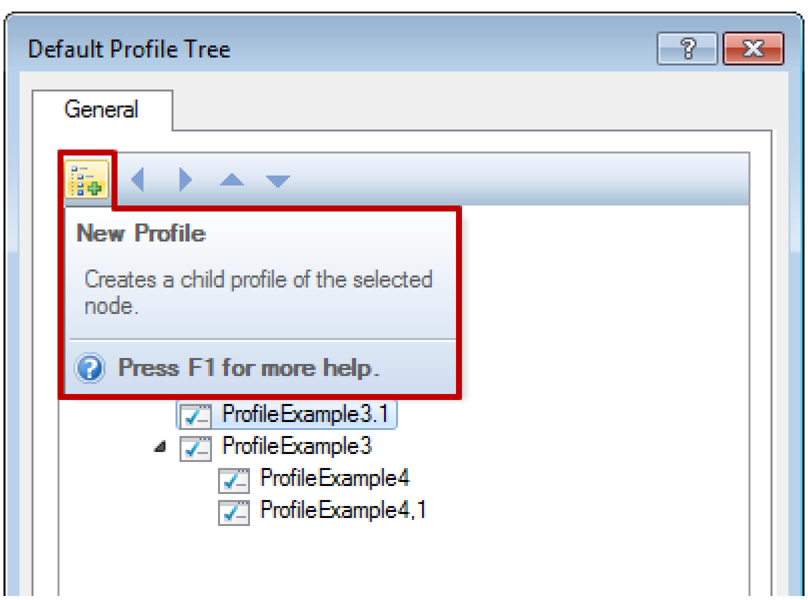
To remove the assigned member, select the user and click the **Remove Assignment** button, press Alt+R or right-click and select **Remove Assignment** from the pop-up menu.

Adding a Profile

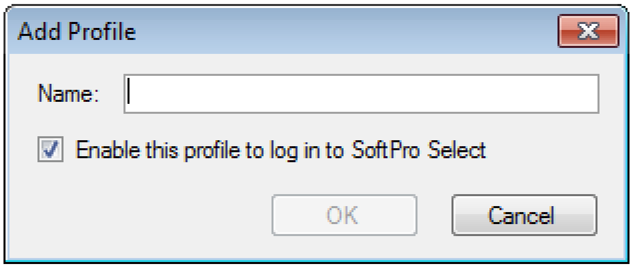
1. Click the **SPAdmin Program Tab.**
2. Click the Configuration button.
3. Select Profiles from the Security folder.
4. Right-click on Profiles and select **Edit Tree** from the pop-up menu, or click the button in the **Profiles** ribbon at top.



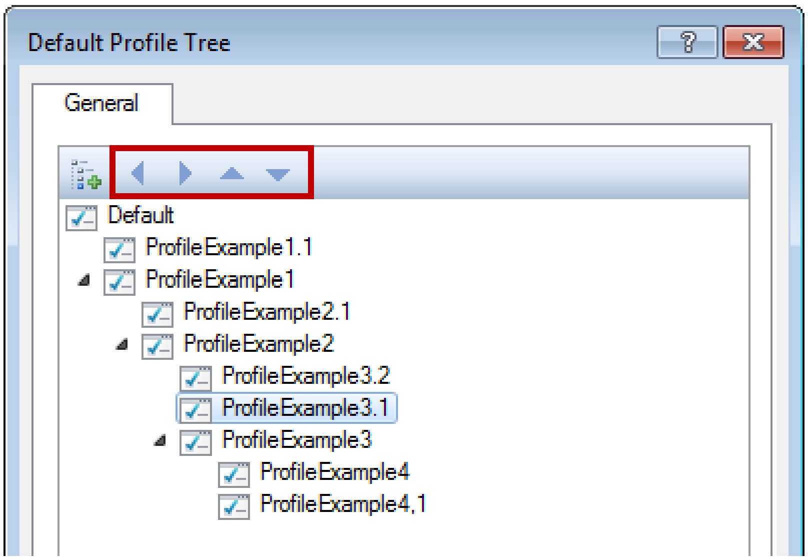
5. Highlight the desired parent folder (Default being the controlling overall parent folder) and click the **New Profile** button.



6. The Add Profile dialog appears:



7. Once the profile has been added, Administrators can move it up, down, left, and right by using the arrows found on the Default Profile Tree toolbar:



8. Click OK to save the changes and close the dialog. Once added, Administrators may double-click on the profile to modify its properties settings.

Editing User Profiles

To view or edit user profiles, **select the user in SPAdmin** and click the **Profiles tab**. On the **Profiles** tab you can assign profiles to the selected user, or remove profiles from a user.

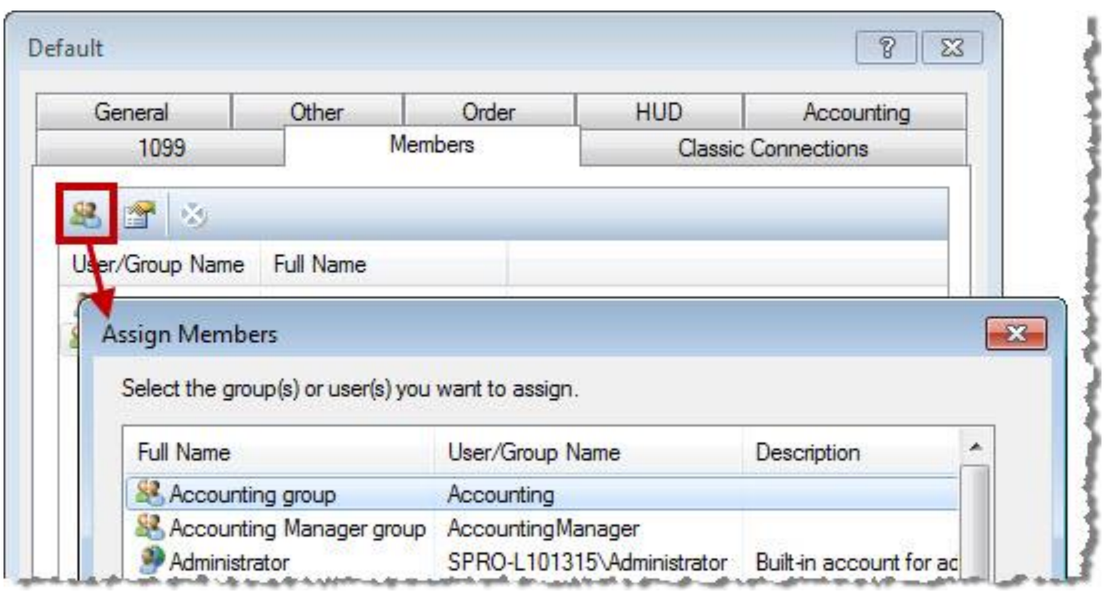
- To assign a profile to the user, click on the Assign Profiles button in the top left of the toolbar and highlight the desired profiles - click **OK** to add the user.
- To remove the user from a profile, right-click the assigned profile and click **Remove Assignment.**

Disabling a Profile

1. Click the **SPAdmin Program Tab.**
2. Click the **Configuration** button.
3. Select **Profiles** from the **Security** folder.
4. Either right-click on the desired profile and select **Disable** from the pop up window or double-click on the desired profile to open the properties and uncheck the **Enable this profile to log in to SoftPro Select** option.
5. A disable confirmation dialog appears - click **Yes** to disable the profile and **No** to cancel the request.

Assigning Profiles to Users or Groups

1. Click the **SPAdmin Tab**.
2. Click the **Configuration** button.
3. Select **Profiles** from the **Security** folder.
4. Double-click on the desired profile to produce the properties dialog.
5. Click on the **Members** tab.
6. Click on the **Assign Membership** button:



7. The **Assign Members** dialog lists all enables users and groups.
8. Highlight the desired users and groups and click **OK** to add.
9. Click **OK** again to save changes and close the Profile properties dialog.

Removing Users or Groups from Profiles

1. Click the **SPAdmin Tab**.
2. Click the **Configuration** button.
3. Select **Profiles** from the **Security** folder.
4. Double-click on the desired profile to produce the properties dialog.
5. Click on the **Members** tab.

1. Right-click on the User or Group to be removed and select Remove Assignment or highlight the User or Group and click the Remove Assignment button .

6. Click **OK** again to save changes and close the Profile properties dialog.

Group Management

User/Group Management in SPAdmin is used to view and edit **users** and groups. This topic contains links to other instructions about users and groups.

Accessing User/Group Management

1. Click the SPAdmin **Program Tab**.

2. Click the Configuration button.
3. Select Groups from the Security folder.

Groups

Groups are associations of users that share the same permissions. The permissions assigned to a group will apply to every user that is a member.

Note: A user may belong to more than one group. However, if one group's permissions grant members the right to a feature but another group to which the user belongs denies the same right, the user will not have access to the feature.

SEARCH FUNCTIONALITY IN GROUPS

The Search functionality enables Full-text instant search and the results pane shows results as the user types. Full-text instant search provides the following:

Performs search against all the group data text fields.

Performs a 'starts with' search using an 'or' condition. All special characters are ignored, common 'stop words' like prepositions are also omitted. Full-text search is not case sensitive.

Stores up to ten previous searches in the Search drop-down until the user leaves the group pane.

Results pane lists the first 200 groups.

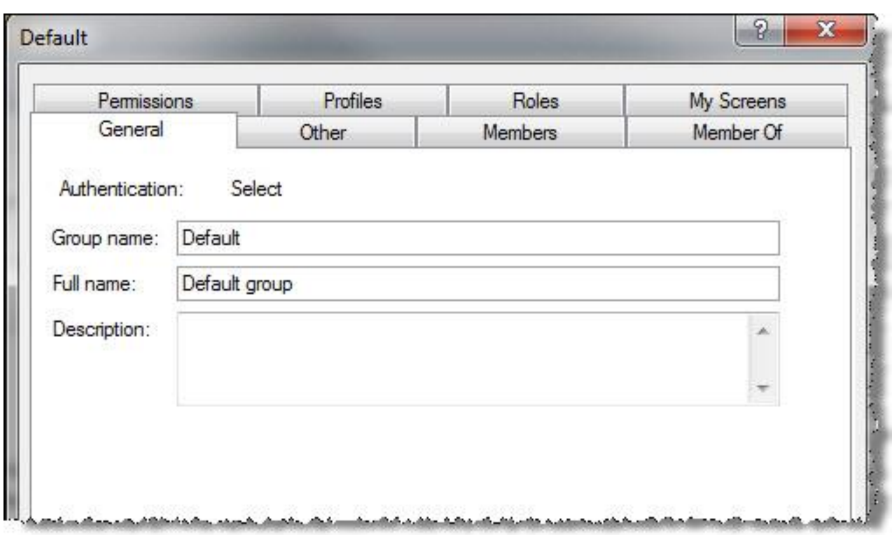
Setting Up Groups

Administrators can organize users with similar workflow requirements into groups. The permissions set for a group automatically apply to all member users. SoftPro Select comes with several preset groups to which Administrators can add users and permissions; custom groups may also be created. Follow these steps to set up custom groups:

1. Access **SPAdmin**, then navigate to **Security > Groups**.
2. Right click in the **Groups pane**, and choose **New Group.**
3. Create and name new group. **Note:** You may choose to create either a **Windows®** group, or to input a name to create a **Select** group. If you choose the Windows® group option, you will be able to browse out to the Active Directory to search for and select a group.
4. You may set various options for your new group by using the tabs on the group dialog (i.e.- General, Other, Members, Member Of, Permissions, Profiles, Roles, My Screens). You may restrict access to features to which the members should not have access. Every user added to the group will inherit the group's permissions.
5. **Select and add all users** to be part of the new group. Users can belong to more than one group.
6. After adding a user to a group, the user's properties may be accessed by right clicking their name under the **General** tab; their individual permissions may then be edited . **Note:** A user cannot be given access to a feature that the group permissions explicitly deny.

Group - Properties Dialog

Administrators can access the Properties dialog by double-clicking on a selected group, right-clicking on the group and selecting Properties, or by clicking the Properties toolbar button. The Properties dialog contains the following tabs:



The dialog also includes **OK**, **Cancel** and **Apply**. Clicking **OK** saves any changes and closes the dialog. Clicking **Cancel** closes the dialog without saving any changes. Clicking **Apply** saves the changes and remains on the current tab. Apply is only enabled when changes occur.

Note:

1. Groups cannot be disabled.
2. Pressing the **ESC** key or the **x** button performs the Cancel function.

General Tab

Authentication: Displays the authentication method of **Windows®** or **Select**.

Group name: Enter a group name if Select is chosen, or click the **Browse...** button to select from a specified location.

Full name: Enter the full name of the group (Select only).

Description: Enter additional information for descriptive purposes.

Note: if a Windows® group is selected all fields are disabled

Other Tab

Last Modified On: Indicates the date and time the group was last modified.

Last Modified By: Indicates the name of the account or user who made the last modification to the group.

Note: Last Modified By/On is updated only when a group's general information is updated.

Positions: Provides the ability to assign positions which the associated users or groups can inherit. This includes: **Title Officer/Examiner**, **Escrow Officer/Closer**, **Escrow Assistant/Pre-Closer**, and **Marketing Representative**.

Members Tab

The Members tab is present for groups only and lists all of the groups or users directly assigned to the selected group. Administrators can access the group or user's properties by double-clicking on the selected group or user, right-clicking and selecting **Properties** or clicking the Properties toolbar button.

Administrators can assign members by clicking the **Assign Membership** button on the toolbar, using the right-click menu or by using the shortcut key (**Alt+M**).

The **Assign Members** dialog displays a list of groups or users you can assign to the group. The dialog allows sorting and multi-select to assign.

Note:

1. Any active groups and users can be assigned to Select groups.
2. No groups or users can be assigned to Windows® groups.

Administrators can remove assigned members by clicking the **Remove Assignment** button on the toolbar, by shortcut key (**Alt+R**), or a right-click menu option.

Member Of Tab

In this tab, groups can be assigned as a member of another group. Group assignments can be inherited. Inherited groups are indicated by ghosted icons.

Assign groups by clicking the **Assign Membership** button on the toolbar, right-click menu or by shortcut key (**Alt+M**).

The **Assign Groups** dialog displays a list of groups you can assign to the group. The dialog allows sorting and multi-select to assign.

Note: Only active Select groups are available for assignment on the Member Of tab.

Administrators can remove assigned groups by clicking the **Remove Assignment** button on the toolbar, by shortcut key (**Alt+R**), or a right-click menu option.

Permissions Tab

This tab enables Administrators to assign permissions to groups for groups and their associated users to inherit. Right-clicking on the group allows Administrators to modify rights directly. Double-clicking **Details** on the right-click menu, or double-clicking the selected permission also opens the **Group Permission** dialog.

A user's effective rights are displayed based on the effective rights of any group the user is directly assigned to as well as user specific assignments. However, if one group's permissions grant members the right to a feature, but another group to which the user belongs denies the same right, the user will not have access to the feature.

Profiles Tab

Administrators can assign profiles to groups for groups and users to inherit. Current groups may inherit profiles from their parent profiles. Inherited profiles are shown by a ghosted icon.

Roles Tab

Administrators can assign roles to groups for the groups and users to inherit. Inherited roles are shown as ghosted icons. Administrators can **Assign** and **Remove** roles for groups. The procedure is similar to that described in the **Members** tab.

MyScreens Tab

Administrators can assign custom screen-sets to groups for groups and users to inherit. Inherited screen-sets are reflected by a ghosted icon.

Administrators can **Assign** and **Remove** Profiles for groups. The procedure is similar to that described in the **Members** tab.

Editing Group Properties

1. Click the **SPAdmin** tab.
2. Click the **Configuration** button.
3. Select **Group** from the **Security** folder.
4. Open the **Properties** dialog by double-clicking on the selected group.
5. After editing group information, click **Apply** to save changes and remain on the current dialog or click **OK** to save changes and close the dialog.
6. Click **Cancel** to close the dialog without saving your changes.

Adding a Group

1. Click the **SPAdmin Tab**.
2. Click the **Configuration** button**.**
3. Select **Groups** from the **Security** folder.
4. Right-click on Groups and select **New Group** from the pop up menu or press **Alt+N**.
5. The New Group **Authentication dialog** appears**:** by default, **Windows**® is selected. Click the **Browse** button to select a group from the available locations (e.g. the domain or the local machine). (Optional) **Note:** the General tab will be populated with the information available for the Windows® group and all fields are disabled. This information is synchronized hourly with **Active Directory**.
6. Click **Ok** to save changes and bring up the main group properties dialog.
7. The name field populates from the name given in the Authentication dialog.
8. In **Full name**, enter a longer group name that is more descriptive. (Optional)
9. In **Description**, enter more information to describe the group. (Optional)
10. Assign positions, membership, roles, profiles, and permissions as needed.
11. Click **Apply** to save changes and remain on the current dialog.
12. Click **OK** to save changes and close the dialog. Click **Cancel** to close the dialog without saving your changes.

Note:

- Duplicate group names for *active* groups are prohibited.
- Duplicate and multiple entries of group names for *inactive* or *deleted* groups are permitted.

Deleting a Group

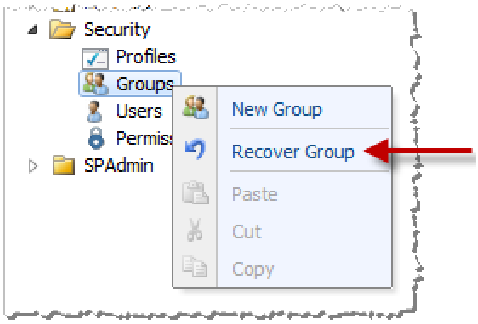
1. Administrators may delete a group only if the required set of permissions have been granted.
2. Click the **SPAdmin Tab**.
3. Click the **Configuration** button.
4. Select **Groups** from the Security folder.
5. Select a group, and using the right-click menu, click **Delete**.
6. The **Confirm Delete** dialog appears.
7. Click **Yes** to continue to delete the group. Click **No** to cancel.

Note: Administrators may delete both Select and Windows® groups. A Windows® group that is deleted in Select will no longer be updated by the Active Directory synchronization that occurs hourly. Administrators may not delete Windows® groups that exist as a result of their association with a Windows® group added in Select. These groups are distinguished by a ghosted icon. Additionally, unlike other entities in Select, Groups cannot be disabled as this setting does not comply with Active Directory.

Recovering Deleted Groups

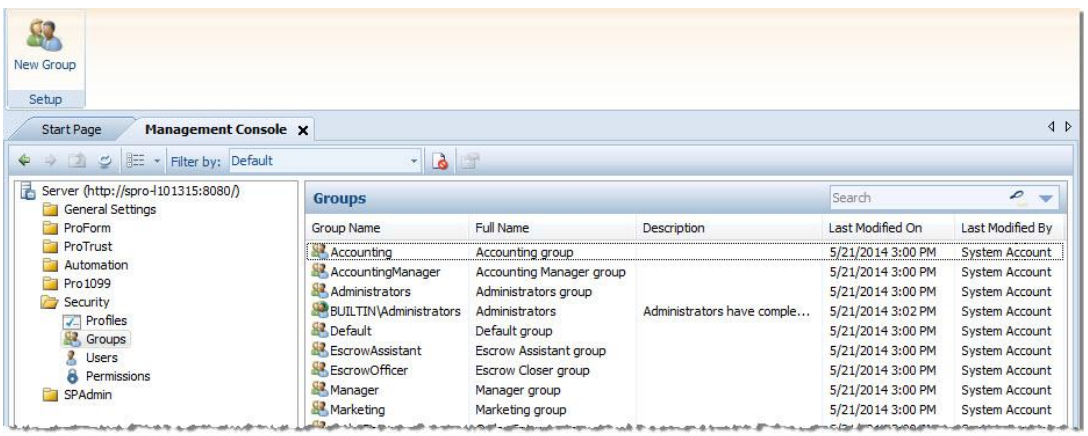
- You can recover **deleted Windows® groups** by simply adding them as new. If the Windows® group already exists, you will be prompted with an option to recover the deleted group.

- You can recover **deleted Select groups** by selecting the Groups node in the tree, and choosing Recover Group from the right-click context menu:

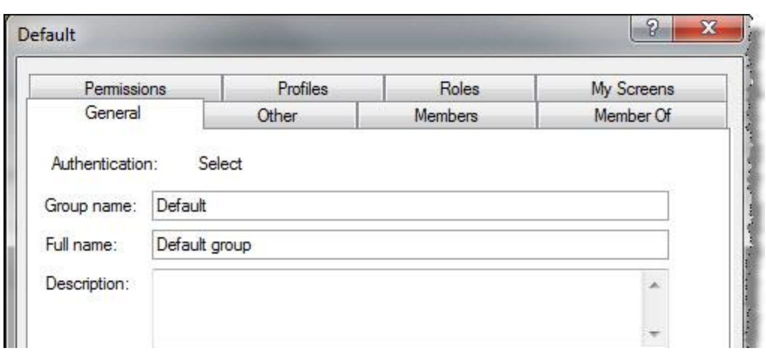


- The Recover Select Group dialog opens. You can sort by column and double-click on a selected group or choose **OK**. You can only recover one group at a time.

Viewing and Editing Groups



1. Click the **SPAdmin** Program Tab.
2. Click the **Configuration** button.
3. Select **Groups** from the **Security** folder.
4. Select a **group** from the list.
5. Double-click on the group to bring up the Properties dialog.
6. Click on the desired tab to view/edit the properties.

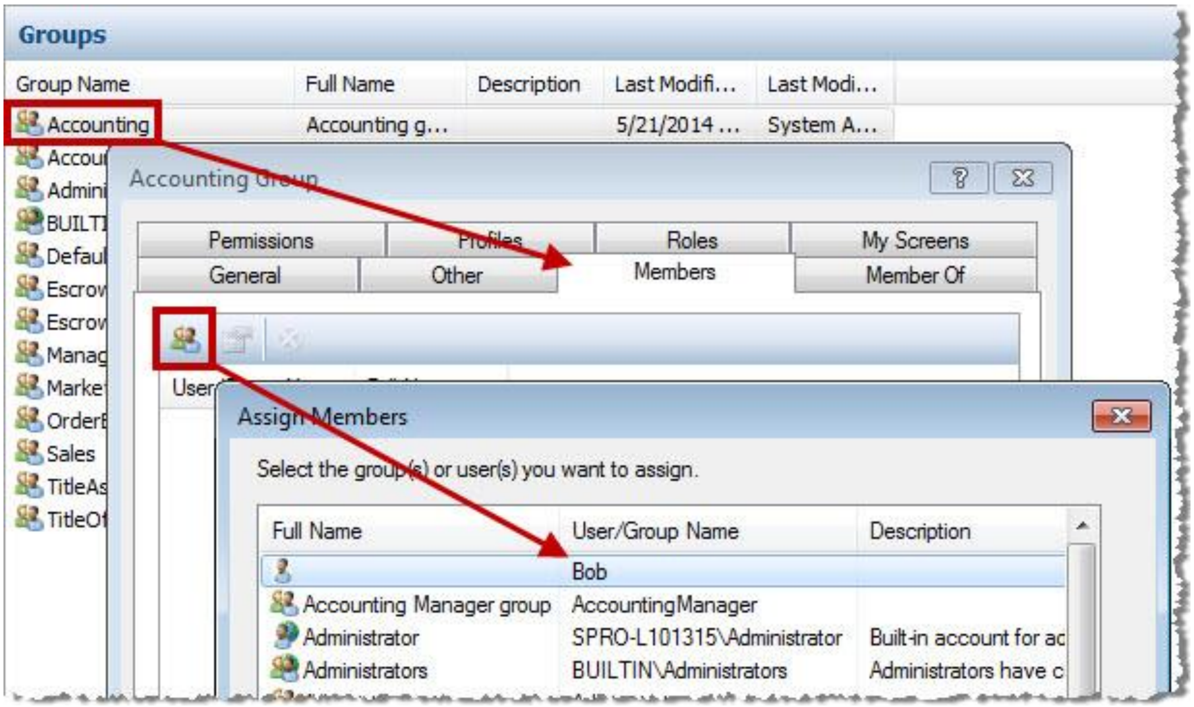


Note: If the desired group isn't visible, the filter could be the problem.

Adding a User to a Group

All new entries must be assigned to a group under the membership to enable a user to view have specific permissions.

1. Click the **SPAdmin** program tab.
2. Click the **Configuration** button.
3. Select **Groups** from the **Security** folder.
4. Double-click on the desired group to pull up the properties dialog.
5. Click on the **Members** tab.
6. Click the **Assign Membership** button and select the desired users to be added.



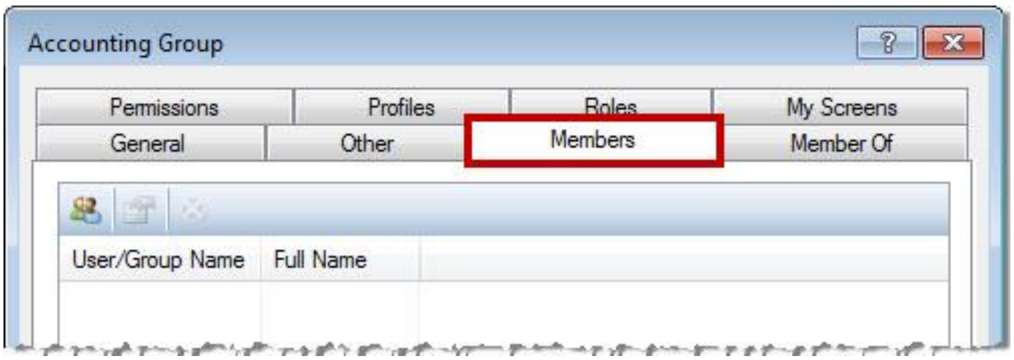
7. Click **OK** to close the Assign Members dialog and **OK** in the properties dialog to save your changes.

Editing Group Memberships

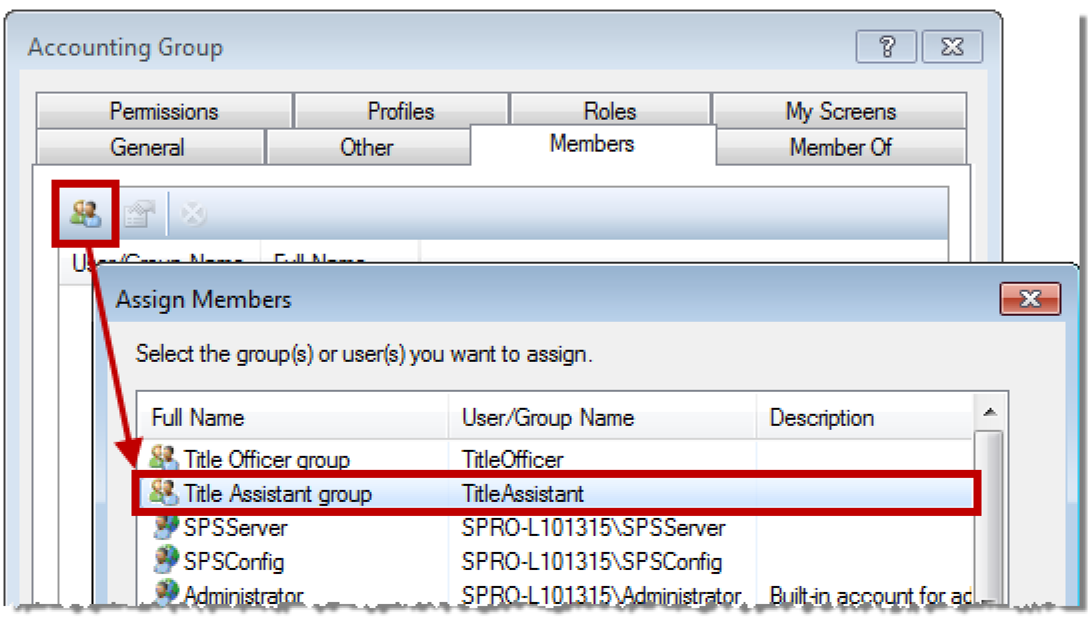
1. Click the **SPAdmin** Program Tab.

2. Click the Configuration button:

3. Select **Groups** from the **Security** folder.
4. Double-click on the desired group to bring up the Properties dialog.
5. Click on the **Members Tab**.



6. To add a user to the group, click the **Assign Membership button to bring up the Assign Members dialog and select the users you wish to add.**



7. To remove users from the group, right-click on the user name on the Members tab and select **Remove Assignment** from the pop-up window.

Note: After editing user information, click OK to preserve your changes.

Adding Users or Groups to a Group

Users and groups are assigned to a group under the **Member Of** tab. Groups and their associations are inherited based on this assignment. Inherited groups are indicated by a ghosted icon.

ADDING A GROUP THROUGH THE GROUPS PROPERTIES DIALOG:

1. Click the SPAdmin Tab.
2. Click the Configuration button.
3. Select Groups from the Security folder.
4. Double-click on the desired group and select the Member Of tab from the properties dialog.
5. Click the **Assign Membership** button and select the group(s) to assign.
6. Click **OK** to return to the Properties dialog and **OK** again to save your changes.

ADDING A USER TO A GROUP THROUGH THE USER PROPERTIES DIALOG:

1. Click the **SPAdmin Tab**.
2. Click the **Configuration** button.
3. Select **Users** from the **Security** folder.
4. Double-click on the desired user and select the **Member Of** tab from the properties dialog.
5. Click the **Assign Membership** button and select the group(s) to assign.
6. Click **OK** to return to the Properties dialog and **OK** again to save your changes.

Removing a User from a Group

REMOVING A USER FROM A GROUP THROUGH THE GROUPS PROPERTIES DIALOG:

7. Click the **SPAdmin Tab**.
8. Click the **Configuration** button.
9. Select **Groups** from the **Security** folder.
10. Double-click on the desired group and select the **Members** tab from the properties dialog.
11. Click to highlight the user you wish to remove.
12. Right-click and select Remove Assignment or click the Remove Assignment button  on the tab's toolbar.
13. Click **OK** to return to the Properties dialog and **OK** again to save your changes.

REMOVING A USER FROM A GROUP THROUGH THE USER PROPERTIES DIALOG:

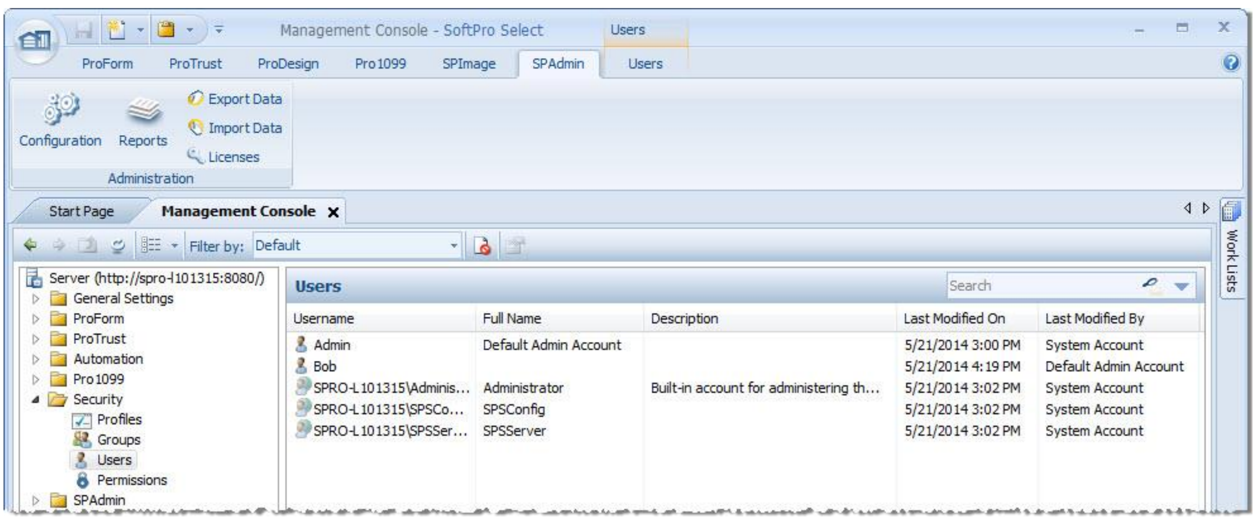
1. Click the **SPAdmin Tab**.
2. Click the **Configuration** button.
3. Select **Users** from the **Security** folder.
4. Double-click on the desired user and select the **Member Of** tab from the properties dialog.
5. Highlight the group from which to remove the user.
6. Right-click and select Remove Assignment or click the Remove Assignment button  on the tab's toolbar.
7. Click **OK** to return to the Properties dialog and **OK** again to save your changes.

Removing a Group from a Group

1. Click the **SPAdmin Tab**.
2. Click on the **Configuration** button.
3. Select **Groups** from the **Security** folder.
4. Double-click on the desired Group to open the **Properties** dialog.
5. Click the **Member Of** tab. Select the group(s) in the **Member Of** window. You can also multi-select using **Ctrl+Click** or **Shift+Click**.
6. Right-click and select **Remove Assignment** or click  on the tab's toolbar.
7. Click **Apply** to save changes and remain on the current dialog or click **OK** to save changes and close the dialog.
8. Click **Cancel** to close the dialog without saving your changes.

User Management

User/Group is located in SPAdmin in the **Security** folder of the **Configuration** menu. The **User** section allows you to view and edit users. This topic contains links to other instructions about users.



Users

Users are the people in your organization that access SoftPro Select to work. Each user should be added to SPAdmin so that access to SoftPro Select can be defined and controlled. After adding a user to SPAdmin, you can add the user to groups that give them permissions to the set of SoftPro Select features they need, or you can customize a user's permissions outside of a group. Users can also be assigned to workflow **roles** and **profiles** in your organization.

In some organizations, users are expected to perform a variety of different tasks within SoftPro Select, requiring access to many different areas of the program. In others, specialization among users can be high. In larger organizations there can be groups of users that perform similar tasks in SoftPro Select, with the members of each group only requiring access to very specific areas in the program.

Each user must be added to SPAdmin so that their permissions can be managed. **Permissions** are the list of features controlled by SPAdmin. After adding a user to SPAdmin, you can set up permissions by granting or denying access to particular features manually or by assigning the user to a group. See **Group Management**.

The level of control over a user's permissions is up to you, but SPAdmin allows you to be very particular. For example, you can grant a user the ability to access ProForm to print a document, but deny the user the ability to change a sales price amount in an order. You should set users' permissions to allow them to do their jobs with SoftPro while maintaining security over areas you don't want to grant access.

SEARCH FUNCTIONALITY IN USERS

The Search functionality enables ***full-text instant search*** and the results pane shows results as the user types. Full-text instant search provides the following:

- Performs search against all the users data text fields.
- Performs a "**starts with**" search using an "**or**" condition. All special characters are ignored, common "**stop words**" like prepositions are also omitted. Full-text search is not case sensitive.
- Stores up to ten previous searches in the Search drop-down until user changes nodes.
- Results pane lists the first 200 users.

User - Properties Dialog

You can access the Properties dialog by double-clicking on a selected user, right-clicking on the user and selecting **Properties**, or by clicking the Properties toolbar button. The Properties dialog contains the following tabs:

- General
- Other
- Member Of
- Permissions
- Profiles
- Roles
- My Screens

The dialog also includes **OK**, **Cancel** and **Apply**. Clicking **OK** saves any changes and closes the dialog. Clicking **Cancel** closes the dialog without saving any changes. Clicking **Apply** saves the changes and remains on the current tab. Apply is only enabled when changes occur.

Note: Pressing the **ESC** key or the **X** button performs the **Cancel** function.

General Tab

Authentication: Displays the user's authentication as Windows® or Select.

Username: Displays the user's name.

Full name: Displays the user's full name. This is a calculated value based on user's first name, middle initial and last name. This field is always disabled.

Description: Provides additional information for descriptive purposes.

Note:

1. If this is a Select user, the **Browse...**button is always disabled and the **Password...**button is enabled.
2. If this is a Windows® user, all fields except **Allow edit** check box and **Enable this user** check box are disabled. Check the **Allow edit** check box to edit the user's contact information.

3. The selected user's entire contact information is displayed, either entered directly or taken from the central database.

Contact Information: The Contact Information grid defines the details of a user.

- **First name:** Enter the first name of the user.
- **MI:** Enter the middle initials of the user.
- **Last Name:** Enter the last name of the user.
- **Initials:** This is a calculated value based on user's first name, middle initial and last name. This field is always disabled.
- **Title:** Enter the Title of the user.
- **Email:** Enter the email address of the user.
- **Phone:** Enter the phone number and extension (if applicable) of the user. **Note:** The extension should be preceded by **ext** or **x** to indicate it as an extension.
- **Cell:** Enter the cell phone of the user.
- **Fax:** Enter the fax number of the user.
- **Pager:** Enter the pager number of the user, if applicable.

Enable this user to log in to SoftPro Select: This check box controls the log-in access for the selected user. The default value is always checked.

Other Tab

Last Modified On: Indicates the date and time the user was last modified.

Last Modified By: Indicates the name of the account or user who made the last modification.

Note: Last Modified On/By are updated only when a user's contact information is updated.

Positions: Provides the ability to assign positions specifically to users. Positions may be inherited from group assignments. Inherited positions will be checked and disabled. The positions include: **Title Officer/Examiner**, **Escrow Officer/Closer**, **Escrow Assistant/Pre-Closer**, and **Marketing representative**.

Signature Image: Displays the signature image associated with the selected user. Administrators can view the image, clear it or browse to add another image. **Note:** The Signature Image option is available only for users and is enabled for both *Windows®* and *Select* users.

Member of Tab

In this tab, Administrators can assign a user as a member of a group. Group assignments can be inherited; inherited groups are indicated by ghosted icons.

Administrators can assign groups by clicking the **Assign Membership** button on the toolbar, right-click menu or by shortcut key (**Alt+M**).

The **Assign Groups** dialog displays a list of groups Administrators can assign to the user. The dialog allows sorting and multi-select to assign.

Note: Only active Select groups are available for assignment on the Member Of tab.

Administrators can remove assigned members by clicking the **Remove Assignment** button on the toolbar, by shortcut key (**Alt+R**), or a right-click menu option.

Permissions Tab

This tab enables you to view a user's permission based on a group assignment, and also to assign permissions directly to users. Right-clicking will allow you to modify rights directly. You can also double-click **Details** on the right-click menu, or double-click the selected permission to open the **User Permission** dialog.

A user's effective rights are displayed based on the effective rights of any group the user is directly assigned to and any user specified rights. If a right is denied by any group the user is related to, the right will be denied.

Profiles Tab

Administrators can assign profiles directly to users. User may also inherit profiles from their related groups; inherited profiles are indicated by ghosted icons.

Administrators can **Assign** and **Remove** Profiles for users. The procedure is similar to that described in the Member Of tab.

Roles Tab

Administrators can assign roles directly to users. Users may also inherit roles from their related groups; inherited roles are indicated by ghosted icons.

Administrators can **Assign** and **Remove** roles for users. The procedure is similar to that described in the Member Of tab.

My Screens Tab

The users My Screens tab is read-only. Administrators can see all screen sets assigned to the users based on their related groups.

Users - Properties Dialog

You can access the Properties dialog by double-clicking on a selected user, right-clicking on the user and selecting Properties, or by clicking the Properties toolbar button. The Properties dialog contains the following tabs:

- General
- Other
- Member Of
- Permissions
- Profiles
- Roles
- MyScreens

The dialog also includes **OK**, **Cancel** and **Apply**. Clicking **OK** saves any changes and closes the dialog. Clicking **Cancel** closes the dialog without saving any changes. Clicking **Apply** saves the changes and remains on the current tab. Apply is only enabled when changes occur.

Note: Pressing the **ESC** key or the **x** button performs the **Cancel** function.

General Tab

Authentication: Display's the user's authentication as **Windows®** or **Select**.

Username: Displays the user's name.

Full name: Displays the user's full name. This is a calculated value based on user's first name, middle initial and last name. This field is always disabled.

Description: Provides additional information for descriptive purposes.

Note:

1. If this is a **Select** user, the **Browse...** button is always disabled and the **Password...** button in enabled.
2. If this is a **Windows®** user, all fields except **Allow edit** checkbox and **Enable this user** checkbox are disabled. Check the **Allow edit** checkbox to edit the user's contact information.
3. The selected user's entire contact information is displayed, either entered directly or taken from the central database.
4. **Contact information:** The Contact Information grid defines the details of a user:

- **First name**: Enter the first name of the user.
- **MI:** Enter the middle initial of the user.
- **Last name:** Enter the last name of the user.
- **Initials:** This is a calculated value based on user's first name, middle initial and last name. This field is always disabled.
- **Title:** Enter the Title of the user.
- **Email:** Enter the email address of the user.
- **Phone:** Enter the phone number and extension (if applicable) of the user. **Note:** The extension should be preceded by **ext** or **x** to indicate it as an extension.
- **Cell:** Enter the cell phone of the user.
- **Fax:** Enter the fax number of the user.
- **Pager:** Enter the pager number of the user if applicable.
- **Enable this user to log in to SoftPro Select:** This check box controls the log-in access for the selected user. The default value is always checked.

Other Tab

Last Modified On: Indicates the date and time the user was last modified.

Last Modified By: Indicates the name of the account or user who made the last modification to the group.

Note: Last Modified By/On is updated only when a user's general information is updated.

Positions: Provides the ability to assign positions specifically to users. Positions may be inherited from group assignments. Inherited positions will be checked and disabled. The positions include: **Title Officer/Examiner**, **Escrow Officer/Closer**, **Escrow Assistant/Pre-closer**, and **Marketing Representative**.

Signature Image: Displays the signature image associated with the selected user. You can view the image, clear it or browse to add another image.

Note: The Signature Image option is available only for users and is enabled for both *Windows®* and *Select* users.

Member Of Tab

In this tab, you can assign a user as a member of another group. Group assignments can be inherited. Inherited groups are indicated by ghosted icons.

You can assign groups by clicking the **Assign Membership** button on the toolbar, right-click menu or by shortcut key (**Alt+M**).

The **Assign Groups** dialog displays a list of groups you can assign to the user. The dialog allows sorting and multi-select to assign.

Note: Only active *Select* groups are available for assignment on the Member Of tab.

You can remove assigned members by clicking the **Remove Assignment** button on the toolbar, by shortcut key (**Alt+R**), or a right-click menu option.

Permissions Tab

This tab enables you to view a user's permission based on group assignment, and also to assign permissions directly to users. Right-clicking will allow you to modify rights directly. You can also double-click **Details** on the right-click menu, or double-click the selected permission to open the **User Permission** dialog.

A user's effective rights are displayed based on the effective rights of any group the user is directly assigned to and any user specific rights. If a right is denied by any group the user is related to, the right will be denied.

Profiles Tab

You can assign profiles directly to users. Users may also inherit profiles form their related groups. Inherited profiles are indicated by ghosted icons.

You can **Assign** or **Remove** Profiles for users. The procedure is similar to that described in the **Member Of** tab.

Roles Tab

You can assign roles to groups for the groups and users to inherit. Inherited roles are shown as ghosted icons. You can **Assign** and **Remove** roles for groups. The procedure is similar to that described in the **Members Of** tab.

MyScreens Tab

You can assign custom screen-sets to groups for groups and users to inherit. Inherited screen-sets are reflected by a ghosted icon.

You can **Assign** and **Remove** Profiles for groups. The procedure is similar to that described in the **Members Of** tab.

Viewing and Editing Users

1. Click the **SPAdmin** Program Tab.
2. Click the **Configuration** button.
3. Select **Users** from the **Security** folder.
4. Select the desired user and double-click to bring up the **Properties** dialog.

Adding a User

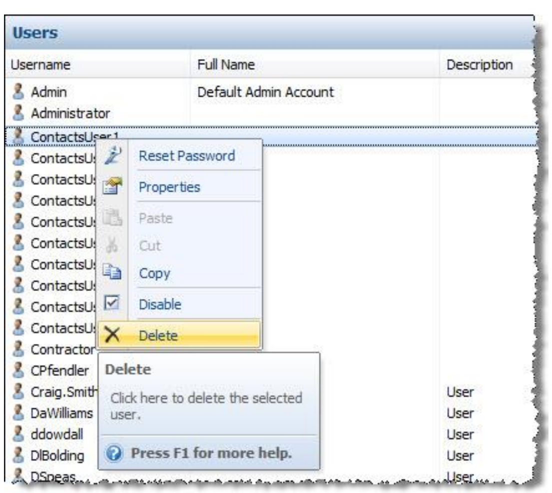
1. Click the SPAdmin **Program Tab**.

2. Click the **Configuration** button.
3. Select **Users** from the **Security** folder.
4. Right-click on **Users**, or right click in the **Users** pane, and select **New User** from the pop-up window or press **Alt+N**.
5. The **New User** authentication window appears.
6. Choose **Select** and enter the username, password and confirm password or select **Windows** to browse for a user in the Active Directory.
7. The User properties dialog appears.
8. Enter the pertinent information, assign roles, profiles, membership and permissions as desired.
9. Click **OK** to save.

Deleting a User

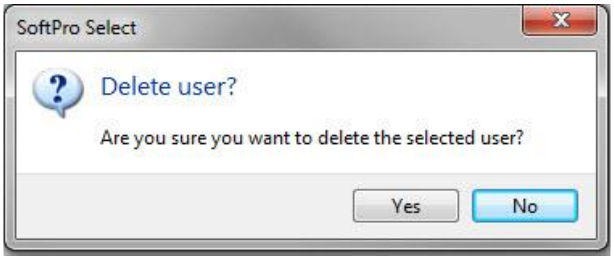
1. Click the SPAdmin **Program Tab**.

2. Click the **Configuration** button.
3. Select **Users** from the **Security** folder.
4. Highlight the desired user, right-click and select **Delete** from the pop-up menu:



Note: If the desired user is not in the current list, the filter could be the problem.

5. The **Confirm Delete** dialog appears:



6. Click **Yes** to continue to delete the user. Click **No** to cancel.

Note: A Windows® user that is deleted in Select will no longer be updated by the Active Directory synchronization that occurs hourly. Administrators cannot delete Windows® users that exist as a result of their association with a Windows® group added in Select. These users are distinguished by a ghosted icon.

Marking a User Disabled

1. Click the **SpAdmin** Program tab.
2. Click on the **Configuration** button.
3. Select **User** from the **Security** Folder.
4. Right-click on the desired user and select **Disable** from the pop-up window.
5. A confirmation window appears; click **Yes** to disable the user.

- Administrators can mark a user that no longer uses SoftPro Select as "disabled" if they want to retain that user's information in SPAdmin for future reference or reactivation.

Editing a User Name

Select user names may be modified if provided the appropriate permissions in SpAdmin. Windows users may not be altered due to their ties to Active Directory.

1. Click the **SpAdmin** Program tab.
2. Click on the **Configuration** button.
3. Select **User** from the **Security** Folder.
4. Double-click on the desired user to bring up the properties dialog.
5. Click on the General tab to modify the **Username** information.
6. Click Apply to save your changes and remind on the dialog or click ok to save your changes and close the properties.

Editing User Properties

1. Click the **SPAdmin Tab**.

2. Click on the **Configuration** button.
3. Select **Users** from the **Security** folder.
4. Open the **Properties** dialog by **double-clicking** on the selected user, **right-clicking** on the user and selecting Properties, or by **clicking the Properties toolbar button**.
5. If a **Select** user is chosen, on the **General** tab you can edit the user name and description, all contact information or **Disable** the user. See the User Properties dialog for more information.
6. After editing user information, click **Apply** to save changes and remain on the current dialog or **click** OK to save changes and close the dialog.
7. If a **Windows®** user is chosen, you can check **Allow edit**, and edit the contact information. You can also **Disable** a Windows® user. **Note:** When **Allow edit** is checked, the user will no longer be synchronized with **Active Directory**. When unchecked, the synchronization will again occur.
8. Click **Cancel** to close the dialog without saving your changes.

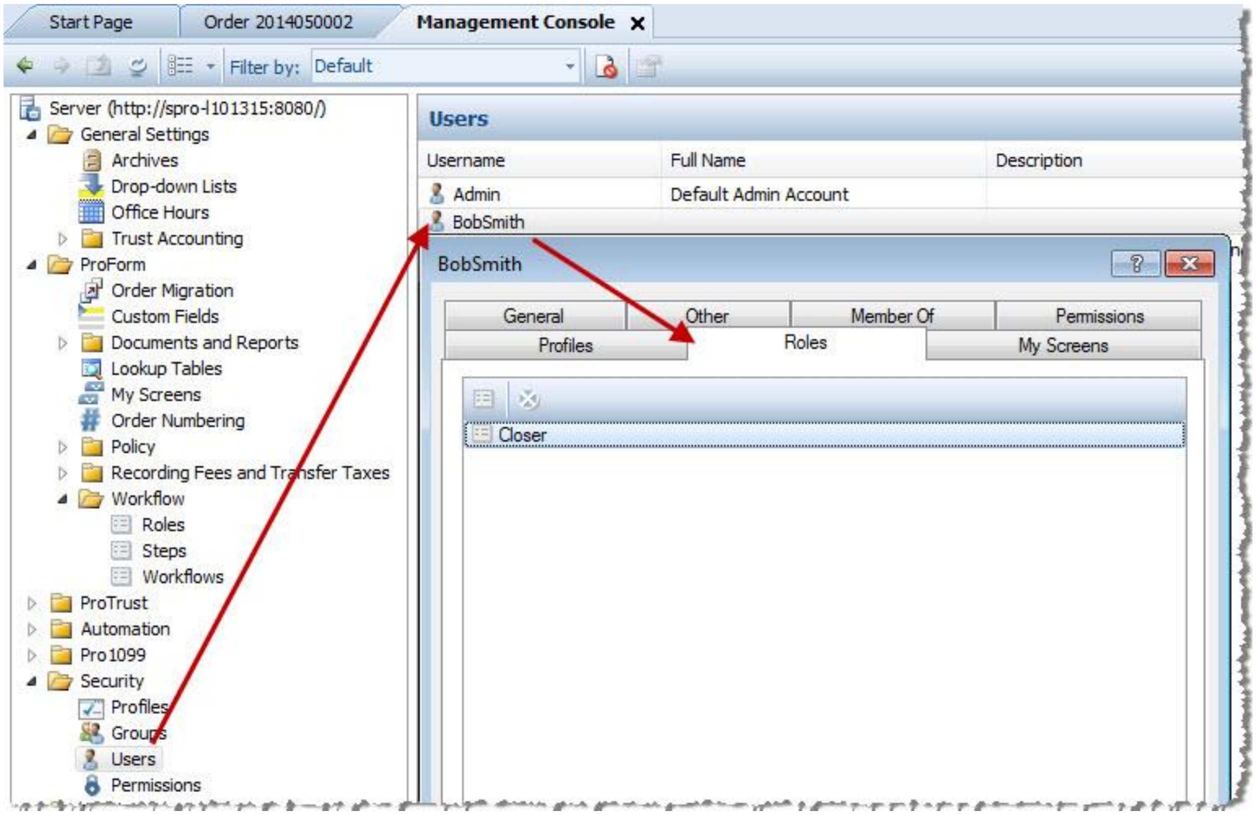
Editing User Profiles

To view or edit user profiles, **select the user in SPAdmin** and click the **Profiles tab**. On the **Profiles** tab you can assign profiles to the selected user, or remove profiles from a user.

- To assign a profile to the user, click on the Assign Profiles button in the top left of the toolbar and highlight the desired profiles - click **OK** to add the user.
- To remove the user from a profile, right-click the assigned profile and click **Remove Assignment.**

Editing User Roles

To view or edit user roles, select the user in SPAdmin by going to **Security > Users**. Right click on the user, select **Properties**, then select the **Roles tab**. From this tab, you can assign roles to the selected user or remove the assignment from that user.



- To assign a role to the user, click the **Assign Roles** button and select one or more available roles; click **OK**.
- To role from a user, select the assigned role and click the **Remove Assignment** button.

Note: After editing user information, click **Apply** to preserve your changes.

Adding Users or Groups to a Group

Users and groups are assigned to a group under the **Member Of** tab. Groups and their associations are inherited based on this assignment. Inherited groups are indicated by a ghosted icon.

Adding a Group through the Groups properties dialog:

1. Click the **SPAdmin Tab**.
2. Click the **Configuration** button.
3. Select **Groups** from the **Security** folder.
4. Double-click on the desired group and select the **Member Of** tab from the properties dialog.
5. Click the **Assign Membership** button and select the group(s) to assign.
6. Click **OK** to return to the Properties dialog and **OK** again to save your changes.

Adding a User to a Group through the User properties dialog:

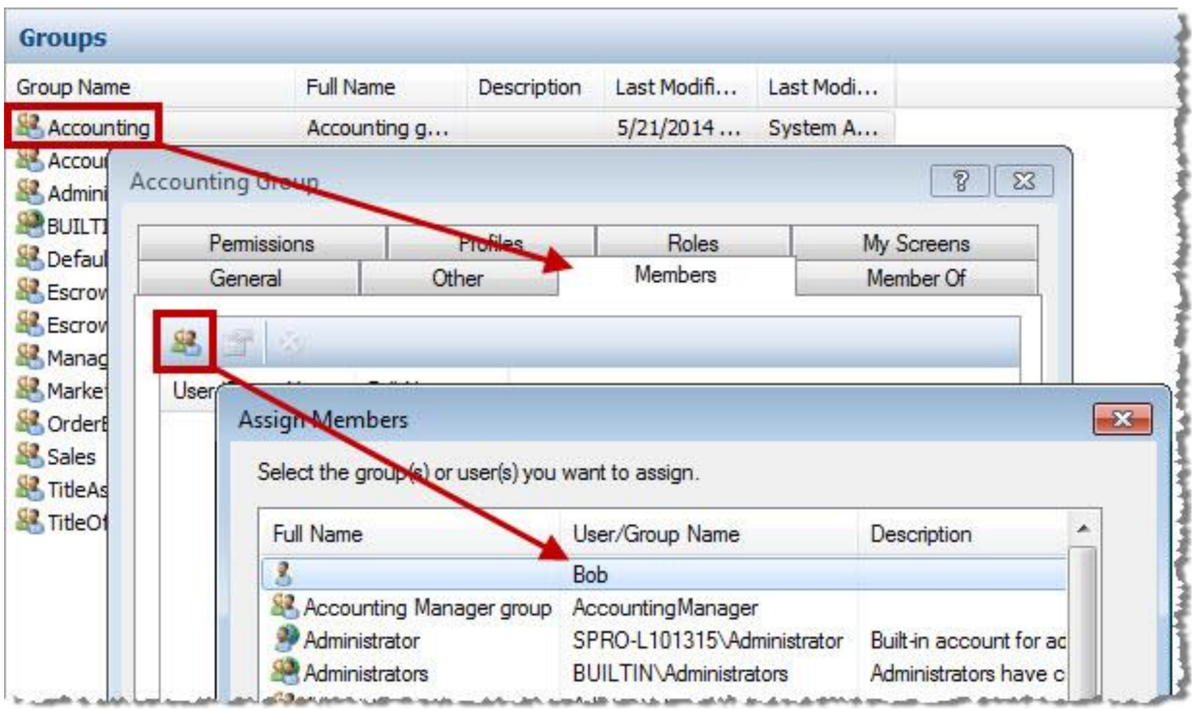
1. Click the **SPAdmin Tab**.
2. Click the **Configuration** button.
3. Select **Users** from the **Security** folder.
4. Double-click on the desired user and select the **Member Of** tab from the properties dialog.
5. Click the **Assign Membership** button and select the group(s) to assign.

6. Click **OK** to return to the Properties dialog and **OK** again to save your changes.

Adding a User to a Group

All new entries must be assigned to a group under the membership to enable a user to view have specific permissions.

1. Click the **SPAdmin** program tab.
2. Click the **Configuration** button.
3. Select **Groups** from the **Security** folder.
4. Double-click on the desired group to pull up the properties dialog.
5. Click on the **Members** tab.
6. Click the **Assign Membership** button and select the desired users to be added.



7. Click **OK** to close the Assign Members dialog and **OK** in the properties dialog to save your changes.

Removing a User from a Group

REMOVING A USER FROM A GROUP THROUGH THE GROUPS PROPERTIES DIALOG:

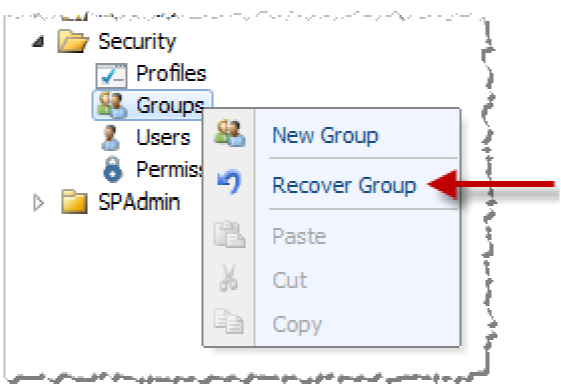
1. Click the **SPAdmin Tab**.
2. Click the **Configuration** button.
3. Select **Groups** from the **Security** folder.
4. Double-click on the desired group and select the **Members** tab from the properties dialog.
5. Click to highlight the user you wish to remove.
6. Right-click and select Remove Assignment or click the Remove Assignment button  on the tab's toolbar.
7. Click **OK** to return to the Properties dialog and **OK** again to save your changes.

REMOVING A USER FROM A GROUP THROUGH THE USER PROPERTIES DIALOG:

1. Click the **SPAdmin Tab**.
2. Click the **Configuration** button.
3. Select **Users** from the **Security** folder.
4. Double-click on the desired user and select the **Member Of** tab from the properties dialog.
5. Highlight the group from which to remove the user.
6. Right-click and select Remove Assignment or click the Remove Assignment button  on the tab's toolbar.
7. Click **OK** to return to the Properties dialog and **OK** again to save your changes.

Recovering Deleted Groups

- You can recover **deleted Windows® groups** by simply adding them as new. If the Windows® group already exists, you will be prompted with an option to recover the deleted group.
- You can recover **deleted Select groups** by selecting the Groups node in the tree, and choosing Recover Group from the right-click context menu:



- The Recover Select Group dialog opens. You can sort by column and double-click on a selected group or choose **OK**. You can only recover one group at a time.

Permissions

The Permissions node is used to view SoftPro Select permissions and add users and groups to them. The **Secured Items** folder contains folders for the various portions of Select to which permissions are assigned:

- Pro1099
- ProForm
- ProTrust
- SPAdmin
- SPImage
- Transactions

This topic contains information and links to other instructions about permissions and rights.

Permissions

Permissions are the rights associated with SoftPro Select features, also known as "secured items". For example, Order Tasks are secured items in SoftPro Select. Users and groups are added to permissions to grant or deny them access to SoftPro Select features. In order to be able to add or delete Order Tasks, a user must be part of the Order Tasks permission, or must belong to a group that is part of the Order Tasks permission.

Properties Dialog

The Permissions window contains a **Secured Items** folder under which the nodes for each assigned permission in Select are housed. The nodes are grouped by category and each node, when double-clicked, has an associated **Properties** dialog. The dialog contains two tabs: **General** and **Rights**.

GENERAL TAB

The General tab contains the following data:

- **Name:** displays the name of the node
- **Category:** displays the category with which the node is associated
- **Available Rights:** displays the rights that are available to be assigned
- **Description:** displays the function of the permissions associated with the node and the actions the user can perform is the associated rights are allowed.

RIGHTS TAB

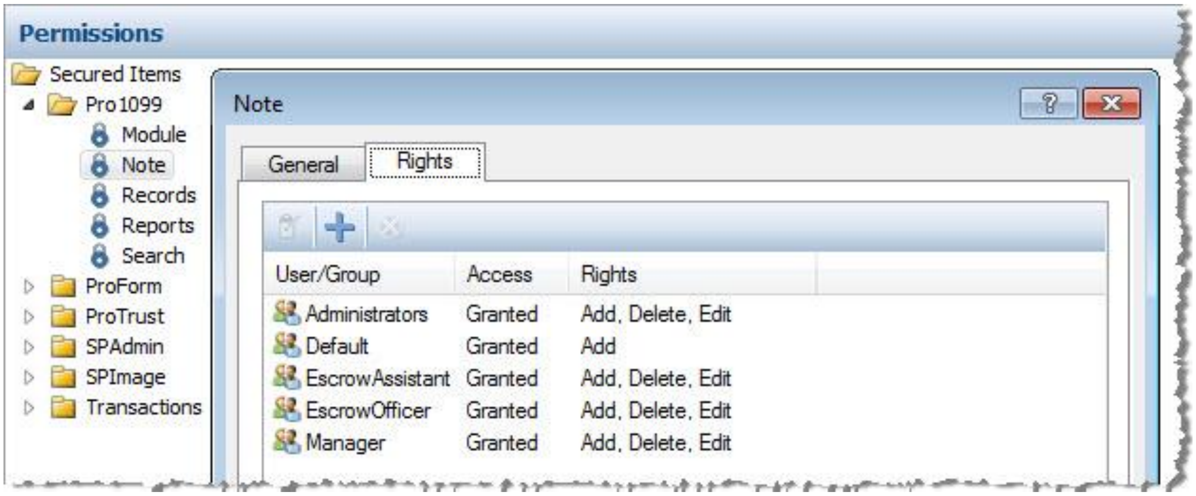
The Rights tab displays the users and groups already associated with that permission node. Additional users and groups can also be assigned through this dialog. For more information on how to add a user or group to a permission, click here.

Adding a User or Group to a Permission

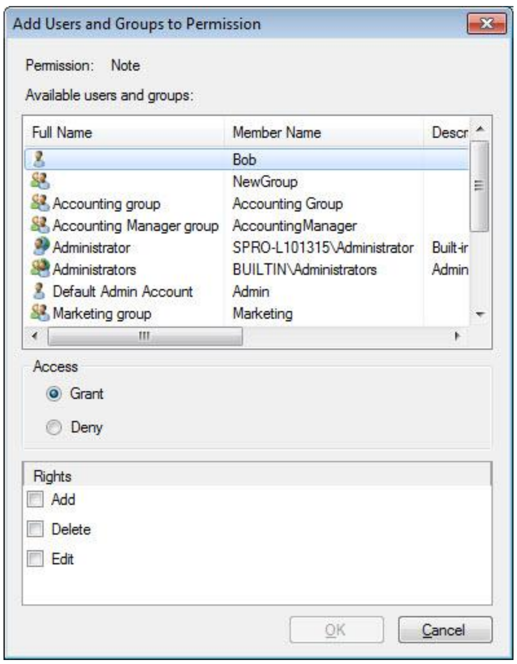
1. Click the **SPAdmin** program tab:

2. Click the **Configuration** button.

3. Click on **Permissions** in the **Security** folder.
4. In the **Permissions** window, under the **Secured Items** folder, open a folder and double-click a node that you wish to add a user or group to. This will bring up the properties dialog of the permission node selected.



5. Click the plus sign to open the **Add Users and Groups to Permissions** dialog:

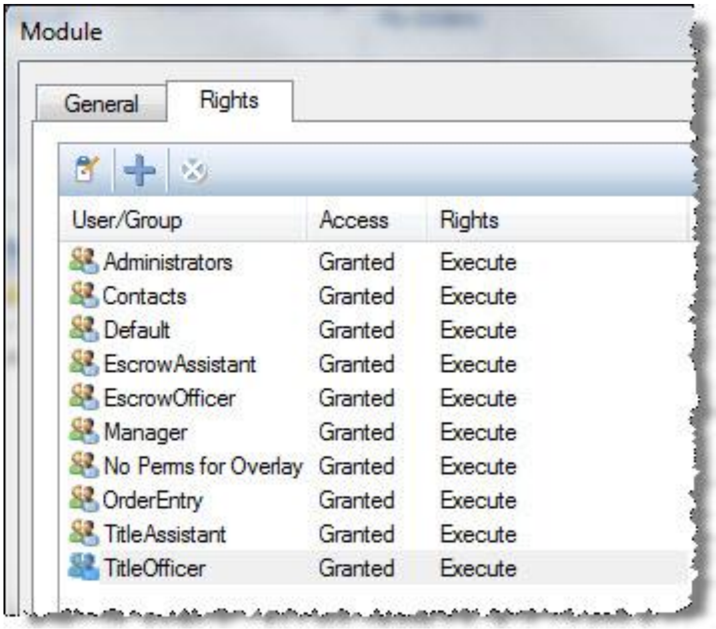


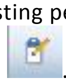
Select a **user** or **group** to add. **Note:** Press and hold **CTRL** to select multiple users or groups.

6. Select either **Grant** or **Deny**.
7. Select the rights that you either want to grant or deny. A permission will have one or more rights associated with it. You must select the right(s) you are granting before you can click OK.
8. Click **OK**.
9. To edit permissions, highlight and double-click an entry under the Rights tab. The User or Group Permission dialog will appear. Select the access you want to grant or deny. Click **OK** to save.

Note: Group rights rule over individual rights. In other words, even if you explicitly grant a single user rights to a feature, if the user belongs to a group that is denied that right, the user will not be able to access the feature.

Assigning/Editing User or Group Permissions



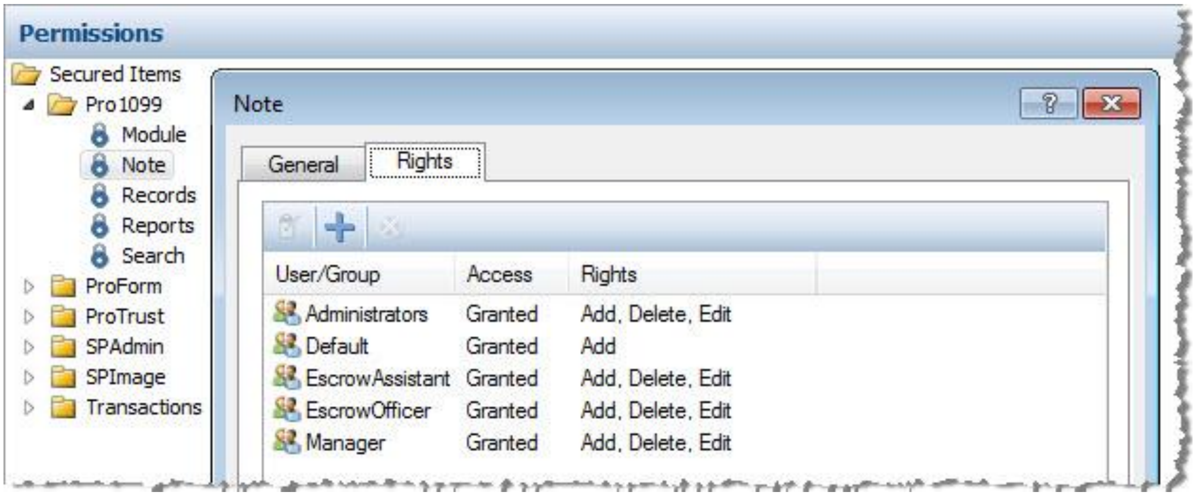
1. Click the **SPAdmin Tab**.
2. Click the **Configure** button.
3. Click **Permissions** in the Security folder.
4. Double-click on the desired permission to bring up the properties dialog.
5. Click the **Rights** tab to access the users and groups assigned to that permission.
6. Click the **Assign Rights** button  to assign rights to new users or groups.
7. To **remove rights** from a user or group, highlight the user or group on in the list and click the **Remove Assignment** button .
8. To **modify** the existing permission set for a user or group in the list, highlight the desired user or group and click the **Details** button .

Removing a User or Group from a Permission

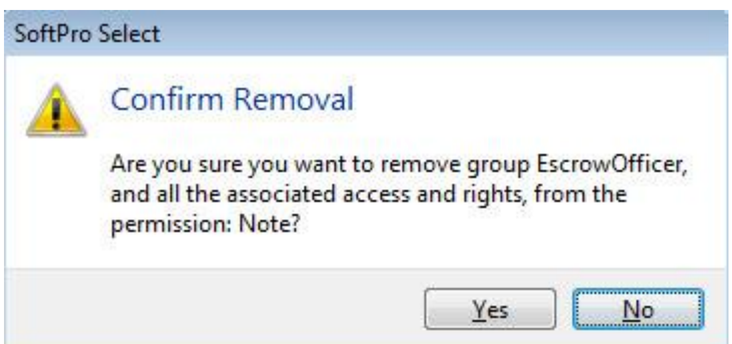
1. Click the **SPAdmin** program tab:

2. Click the **Configuration** button.

3. Click on **Permissions** in the **Security** folder.
4. In the **Permissions** window, click on the folder and node under **Secured Items** from which you would like to remove a user or group. This brings up the properties dialog of the permission node selected.



5. Highlight the user(s) and/or group(s) you wish to remove and click the **Remove Assignment** button  .
6. A **Confirm Removal** dialog appears, detailing the removal you are attempting to complete:



7. Click **Yes**.
8. Click **OK** to exit the properties dialog.

Editing Permission Properties

Administrators can select any secured item in the permissions tree to edit its properties.

Secured Items

Permissions are the rights associated with SoftPro Select features, also known as "secured items".

Permission Item General Properties

Name: the name that appears in the Secured items window.

Category: The folder in which the secured item is stored.

Available rights: The rights associated with the permission. These are the actions regarding this item that can be controlled.

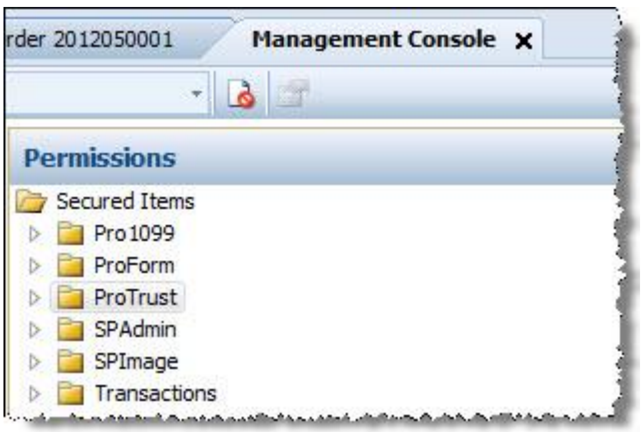
Description: Briefly describes what each permission means. For example, for the Check renumbering permission, the description is "If this permission is granted, the user can access the 'Check Renumbering' toolbar button that is located on the ribbon in ProForm and ProTrust."

Permission Item Rights Assignments

Users and groups are added to permissions to grant or deny them access to SoftPro Select features. For example, in order to be able to add or delete Checklist tasks, a user must be part of the Checklist items permission, or must belong to a group that is part of the Checklist items permission.

Secured Items

Secured items displays in a tree view on the **Permission** screen of the **Management Console**. **Note:** Click a folder to view contents.



Each folder contains several items which can be assigned permissions.

SPAdmin Reports

SPAdmin > Reports contains three default reports to assist the Administrator in setting up permissions. Additional customized reports may be imported into this list as desired.

General Tab

Name: Displays the name of the Report file as it was saved in the database.

Title: Enter the name of the Report as it will show in the tree.

Last modified on/by: The date and login name will appear here after the ReadyDoc has been loaded and saved. This will change each time there is a modification to the manager entry.

Last imported on/by: The date and login name will appear here after the ReadyDoc has been imported and saved. This will reflect when a report has been imported to the manager entry.

Report/Document: Indicates whether the document is a ReadyDoc or a ReadyDoc report developed in Crystal Reports. Report will always be selected.

Category: Choosing a category allows administrators to restrict access to certain reports based on permissions. The available selections are:

- Accounting
- Bulk Sales
- Commercial-Escrow
- Commercial-Title
- Escrow
- Management
- Management-Escrow
- Management-Title
- Title
- Unrestricted

Group: This option allows an administrator to assign this item to a group.

Edit option:This option will always be set at Read-Only.

Protected: The Protected checkbox indicates a SoftPro-created item and is not editable.

Enable this document: Unchecking this box deactivates the Report making it unavailable for use or viewing in a tree.

Trees

The Trees tab displays to which tree(s) the Report has been associated.

SPAdmin Report Trees

The SPAdmin Report Trees manager allows Administrators to arrange SoftPro and custom (as applicable) SPAdmin reports to best suit the needs of the production offices. Trees can be created, copied and disabled from the main manager screen.

General Tab

Name: Enter the name of the tree.

Description: Enter a brief description of the tree to assist in assignment to the appropriate profiles.

Last modified on: This field defaults to the date the manager was created, and is not editable.

Last modified by: This field defaults name of the user that created the manager, and also is not editable.

Protected: This checkbox indicates that the format of the tree cannot be altered. Trees installed by the SoftPro build engine are protected and cannot be altered by Administrators.

Enable this document tree: Unchecking this box deactivates the Tree making it unavailable for use or viewing.

Tree

This tab shows the layout of the chosen tree. Right-click within the tab to **add or remove folders and reports**. Use the arrows at the top of the tab to arrange the sequence and level of the folders and individual reports to structure the tree to the desired configuration. Available reports pull from the content in the SPAdmin Reports manager.

Profiles

This tab allows administrators to assign profiles access to the selected tree. Click the **Assign Profiles** button to add Profiles to have access to the tree. To remove a profile, right-click on the desired profile and select **Remove Assignment**.

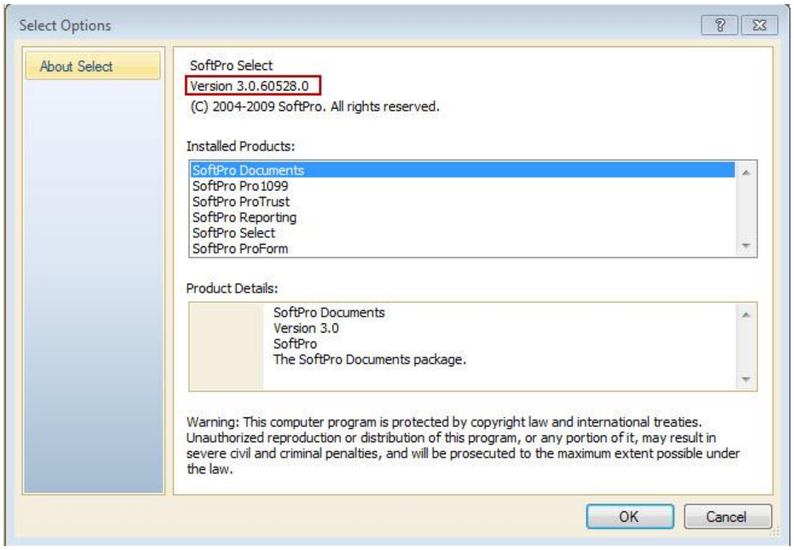
SoftPro Solution Center

SoftPro's technical support staff is the best in the industry. Use the information below to contact them.

SoftPro Solution Center phone:	1 (800) 848-0143
Local calling area:	(919) 829-1122
Fax:	(919) 755-8350
Web:	www.softprocorp.com
mySoftPro:	www.softprocorp.com/mySoftPro/mySoftProLogin.asp (Register with mySoftPro to access the Support Knowledge Base, Document Downloads, and more).
Solution Center hours	Monday to Friday, 8:00 A.M. to 5:30 P.M. EST.
Platinum Level Support hours	Monday to Friday, 8:00 A.M. to 10:00 P.M. EST. Saturday, 11:00 A.M. – 2:00 P.M. EST.

Before calling technical support, please have the following information ready:

- Program version number - select the **File Menu** button, then **Select Options** of SoftPro Select to find this information.



- Text of any error message you have encountered.
- Name and version number of your operating system.

Subscribing to SoftPro's annual maintenance service program can extend technical support service. Subscribing to platinum maintenance service gives you access to technical support for longer hours during the week and on Saturday. For more information, call SoftPro Sales at 800-848-0143. You can e-mail SoftPro Sales at **sales@softprocorp.com**.

Licensing

Upon opening and successfully logging on to SoftPro Select for the first time, the application checks for a license key. If a key has not been entered, a prompt appears to call SoftPro to request a key. SoftPro will e-mail a license key file with the extension **.SPK**. To install the license key, double-click the **.SPK** file from any client workstation.

A license is acquired the first time action is taken within a module (ProForm, ProTrust, SPImage, etc.). Simply navigating to the module's tab will not acquire a license. Likewise, opening the application will not acquire a ProForm license – action must be taken in ProForm.

Licenses for all modules are released when SoftPro Select is closed. Module licenses are also released when all module screens are closed and the user navigates to another module tab. For example, open SoftPro Select, view the ProForm start page, and click the ProTrust tab - no licenses are acquired. However, open the Reconciliation screen in ProTrust, and a ProTrust license is acquired. Leave the Reconciliation screen open and click the ProForm tab, the ProTrust license is still acquired and will not be released until the Reconciliation screen is closed. This process takes approximately 3 minutes.

Exception: ProClear and Positive Pay are licensed separately from ProTrust.

SoftPro Sales

SoftPro's dedicated sales staff is ready to answer your questions.

Contact your account representative for information about the latest SoftPro products, the SoftPro Annual Maintenance Service Plan, Platinum Level Support Plan, upgrade options and prices, and more. Contact the SoftPro Solution Center with any technical questions or problems.

Contacting your SoftPro sales representative

Sales phone:	1 (800) 848-0143
Local calling area:	1 (919) 829-1122
Fax:	1-919-755-8350
Web:	**www.softprocorp.com**
Sales e-mail:	sales@softprocorp.com
Sales hours:	Monday to Friday from 8:30 A.M. to 5:30 P.M. EST.

Note: When sending e-mail, please include your company name, city, and state to ensure prompt handling of your request.