

# SoftPro Standard v21.0

Release Notes | September 13, 2017

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# Summary

This release includes several notable changes:

- The entire application interface has been updated with a new look and feel, including new icons, launch screens, color, buttons, et cetera. The location and function of application screens and fields will remain the same.
- Documents and attachments have been enhanced in several notable ways. All v21 users will receive this functionality for free with their ProForm license:
  - a. Files may now be attached by <u>dragging & dropping</u> them directly into an order.
  - b. Users may now print ReadyDocs directly to the order attachments.
  - c. Attachments can now be <u>emailed with Outlook</u>.
  - d. Any ReadyDoc can now be rendered and <u>emailed as an attachment</u>.
- A number of bug fixes were made.

## General

• The appearance of SoftPro applications has been modernized and improved: 362650



- To ensure best application display, use the following minimum font size/screen resolution combinations: 406899
  - a. Smaller (default) font 1024 x 768
  - b. Medium font 1280 x 720
  - c. Large font 1600 x 900
- To ensure that the new interface icons, colors, and layout are displaying at the highest quality, users should verify that Windows Themes are turned ON.

# ProForm

### Attachments

ProForm Attachments no longer depends on an SPImage license. All v21 users will receive the functionality associated with the Attachments dialog for free with their ProForm license. Additionally, the SPImage license has been removed from the **ProForm for Windows Licensing** screen. SPImage users will now find that license under the **SoftPro for Windows Licensing** screen within SPImage. *392259* 

#### <u>Access</u>

• The Tools > SPImage menu item has been renamed to Attachments:



#### <u>Drag & Drop</u>

• Users may now drag and drop documents directly into the attachments window without using a barcode coversheet. All common file types can be added in this way, including images, .pdfs, Outlook emails/attachments, and more. 372552, 386555

PDF	Attachments (201709000	1)	X
Provide and f	Description	Date/Time	
Guide.pdf	Stewart	09/08/2017 10:33	
	Patriot Search UserGuide	09/08/2017 10:33	
And a second sec	EncompassUserGuide	09/08/2017 10:33	
Search1.png			
Confirmati			
	View Atta	ch Edit Delete Email OK	

• Users may also drag and drop files directly into the ProForm window. Once attached, they will appear in the attachments window:

	Encompas PatriotSearch Stewart.pdf
ProForm Standard Edition - 2017090001.PFD - [20170900	001.PFD (Main Folder) - [STE 21.0 - 09 / 🗖 🔳 🔀
File Reports View Document Mode Tools Se	ervices Support Window Help 🗕 🗗 🗙
General Order Tracking Title Insurance CDF NC Bar Fo	oms
Screens:	ReadyDocs:
1) Settlement Agent, Underwriter     2) File No., Settlement Dates, Notes     3) Buyer/Borrower, Officers & Signatures     4) Seller, Officers & Signatures     5) Sales Price, Deposit/Earnest Money     6) Property, Legal Description     7) Lender     8) Mortgage Broker & Loan Servicer     9) Loan, Funding & Pro Trust     10) Target, Program & ADM	User ReadyDocs Tree SoftPro ReadyDocs Tree Bar Code Cover Order Tracking Title Insurance Escrow & Closing Truth-In-Lending HUD-1

#### Print to Attachments

- Users can now print ReadyDocs to the order attachments. 402410
  - a. Access File > Print to Attachments:

🙆 P	roForm Standard E	dition - 2017090001	.PFD		57
File	Reports View	Document Mode	Tools	Services	Supp
	New		Ct	rl+N	
	Express Order Entr	y	C	trl+E	
	Open		Ct	rl+O ]	N. C. C.
	Search		4	Alt+S o	oms 👌
	Overlay File/Temp	olate		-	
	Close				3
	Save		C	trl+S	1
	Save As				1
	Export				
	Export PFD File for	r Support			
	Print		C	trl+P	Ì
	Print to PDF				1
	Print to Attachme	nts			⊢ (
	Email Documents			mark	

b. Select all the documents you wish to render and save; they will all be saved into a single .pdf file. Input a name into the file name field and click **OK**:

ReadyDocs Selection (Network)		3
Available ReadyDocs:	Selected ReadyDocs:	
User ReadyDocs Tree SoftPro ReadyDocs Tree Bar Code Cover Order Tracking Title Insurance Escrow & Closing Truth-In-Lending HUD-1	Image: Second cover     Up       Image: Second cover     Up       Image: Second cover     Down	
	Save to attachments as: BarCode_2017090001	
ок	Help	

c. After clicking **OK**, you will receive a confirmation message letting you know that the process is complete. The file will appear in the attachments screen.

#### Email Attachments

- An **Email** functionality has now been added to the attachments and can be used when Outlook is installed. 402412
  - a. Open the order attachments. Select one or more attachments & click Email:

Attachments (201709000	)1)	×
Description	Date/Time	
Stewart	09/08/2017 10:33	
Patriot Search UserGuide	09/08/2017 10:33	
EncompassUserGuide	09/08/2017 10:33	
View Atta	ach Edit Delete Email 🔶 OK	

b. The **Email Addresses** dialog will appear, displaying any email addresses that are included in the order. Select the recipients you wish to include on the email and click **OK**:

Ema	il Addresses			X
	Select the contacts to incl	ude in the email:		
	Contact Type	Contact Name	Contact Email	
	<ul> <li>Title Company</li> <li>Mortgage Broker</li> <li>Buyer</li> <li>Additonal Contact</li> </ul>	Samantha Kalloway Donna Hue Paul Druthers Robert Xavier	Samantha.Kalloway@ Donna.Hue@myspac Paul.Druthers@geocit bob@titlecorp.com	
	L	OK Ca	incel	

- i. If no email addresses exist in the order, no email addresses will populate on this dialog. You may still click **OK** to attach the files to a new email and modify email addresses manually; see the next step.
- c. A new **Outlook email** will appear; files will be attached automatically. You may customize the email prior to sending:

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FILE	MESSAGE	INS	ERT OPT	TIONS	FORMAT TEXT	REVIEW	DEVELOPER					
⁼ <b>≡</b> ∎ Send	To Cc Subject Attached	□ <u>Sama</u> Real est	ntha.Kalloway ate order 201 vart.pdf (3 Mf	/@interne 17090001 B); <u>Pa</u> Pa	<u>et.org; Donna.Hue</u> documents triotSearchUserGuid	@myspace.com le.pdf (931 KB)	;  Paul.Druthers@ ;  EncompassUs	erGuid	e.pdf (	8 MB)		
Hello al	ll – ed the docum	nents vou	heteouested	Please li	et me know if you a	re nleased to	let me know vou	are nie	hased			
Best,	eu llie uoculi	nems you	requested.	r iease i	etine know ir you a	ne pleased to	net me know you	are pre	ascu.			
Lazlo H	Lazio Hollyfeld – Pacific Tech – 123.456.7890											
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#### Email Documents

- Users can render and send any ReadyDoc as an email attachment without having to go to the Attachments screen. The email functionality can be used when Outlook is installed. 402410
  - a. Access File > Email Documents:

🕭 ProF	orm Standard Edition - 2017090001.PFD	- [2017090001.PFD (Ma
E File	Reports View Document Mode	Tools Services Su
	New	Ctrl+N
G	Express Order Entry	Ctrl+E
Sc	Open	Ctrl+O
1	Search	Alt+S
2 3	Overlay File/Template	4
4 5	Close	
6	Save	Ctrl+S
8	Save As	4
1	Export	
1	Export PFD File for Support	
1	Print	Ctrl+P
1	Print to PDF	
1	Print to Attachments	
1	Email Documents	-
2	Print Checks	

b. Select all the documents you wish to email; they will all be saved into a single .pdf file. Input a name into the file name field and click **OK**.

ReadyDocs Selection (Network)			x
Available ReadyDocs:	Select	ted ReadyDocs:	
<ul> <li>TLTA Documents</li> <li>Escrow &amp; Closing</li> <li>CDF Documents</li> <li>File Balance Sheet</li> <li>Closing Disclosure Form (Purchase)</li> <li>Closing Disclosure Form (Purchase), Pg 1</li> <li>Closing Disclosure Form (Purchase), Pg 2</li> <li>Closing Disclosure Form (Purchase), Pg 2</li> <li>Closing Disclosure Form (Purchase), Pg 3</li> <li>Closing Disclosure Form (Purchase), Pg 3</li> <li>Closing Disclosure Form (Purchase), Pg 4</li> <li>Closing Disclosure Form (Purchase), Pg 4</li> <li>Closing Disclosure Form (Purchase), Pg 5</li> <li>Closing Disclosure Form (Purchase), Pg 5</li> <li>Closing Disclosure Form (Adendum (Purchited))</li> <li>Closing Disclosure Form (Buyer)</li> <li>Closing Disclosure Form (Seller)</li> <li>Tax and Proration Summary</li> </ul>		ng Disclosure Form (Purchase), Pg 1 ng Disclosure Form (Purchase), Pg 2 ng Disclosure Form (Purchase), Pg 2a ng Disclosure Form (Purchase), Pg 2b ng Disclosure Form (Purchase), Pg 3 ng Disclosure Form (Purchase), Pg 5 ng Disclosure Form Addendum (Purchase)	1
ОК	Help	Cancel	

c. After the documents render as a .pdf, you will get an **Email Addresses** dialog. Select the recipients you wish to include on the email and click **OK**:

Email Addresses			X
Select the contacts to inc	lude in the email: Contact Name	Contact Email	
<ul> <li>Title Company</li> <li>Mortgage Broker</li> <li>Buyer</li> <li>Additonal Contact</li> </ul>	Samantha Kalloway Donna Hue Paul Druthers Robert Xavier	Samantha.Kalloway@ Donna.Hue@myspac Paul.Druthers@geocit bob@titlecorp.com	
	ОК	Cancel	

- i. If no email addresses exist in the order, no email addresses will populate on this dialog. You may still click **OK** to attach the document to a new email and modify email addresses manually; see the next step.
- d. A new **Outlook email** will appear; the .pdf will be attached automatically. You may customize the email prior to sending:

E .	501	• ↓ ⊮	Ŧ	Untitled - Message (I	HTML)	?	Ť	-		×
FILE	MESSAGE	INSERT	OPTIONS	FORMAT TEXT	REVIEW	DEVELO	PER			
ت <b>=</b> Send	To	Samantha.k	Kalloway@intern	net.org; □Donna.Hue(	@myspace.com	; <u>Paul.Dru</u>	ithers(	Dgeoc	ities.c	om
	Attached	CDF Purc	hase 20170900	01.pdf (72 KB)						

### ReadyDocs

- Words were running together in ReadyDocs after a Windows Creator Update (1073). 400601
- A couple of zoom-related errors were occurring when previewing ReadyDocs; resolved. 319067

### Title Insurance

#### ALTA Endorsements

- Changes have been made to comply with the ALTA Endorsement 23.1-06 update effective on August 1, 2017. This includes the following two documents: 403443
  - a. Endorsement 23.1-06 (Co-Insurance Multiple Policies-Loan)
  - b. Endorsements 23.1-06 (Co-Insurance Multiple Policies-Owner's)

## **Escrow & Closing**

#### <u>Tax Forms</u>

• The **Certification for 1099 Reporting Exemption (Legal And Letter)** form was not pulling the SSN for data entered in the SellerSSN2 {{slr1ssn2}} position. 397194

### Tabs

<u>CDF Page 2</u>

• When **Paid By Others** was used in conjunction with the **SIr%** field in the **Recording Fees details**, the **Seller Paid At Closing** amounts were being removed, resulting in incorrect totals. 404367

## **ProTrust**

• Users may click into the **Firm File ID** field & use **Ctrl+C** to copy the ID for pasting elsewhere. 404879



• The Add, Edit, & Delete Ledger Transaction icons have been repositioned directly above the Transaction section. 97869

ProTrust for Windows
<u>File Edit Search Ledger Reports View Tools H</u> elp
Ledger Information
Firm File ID: 000093224
Client/Matter:
Ledger Comment:
Settlement Date: / / Reminder Date: / /
Buyer/Borrower: Bob Buyer
Seller: Lender:
Property: Loan #:
Trust Account: TAC – Responsib
Transaction Number Date Cleared Amount Payee Name / Desc
Pending Check 150.00 June Schwinn

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