

SoftPro Standard v21.0.3

Release Notes | February 7, 2018

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Table of Contents

Summary4
General4
ProForm5
Attachments
Access
Drag & Drop5
Print to Attachments7
Email Attachments8
Email Documents9
ReadyDocs
Title Insurance
ALTA Endorsements11
Escrow & Closing11
Tax Forms
Tabs
CDF Page 211
ProTrust12
21.0.1 (10/18/2017)
STD.21.0.50912.1 (HF1)
Pro1099
21.0.2 (11/8/2017)
STD.21.0.50912.8 (HF2)14
ProForm14
21.0.3 (2/7/2018)
STD 21.0.50912.12 (HF3)15
ReadyDocs15

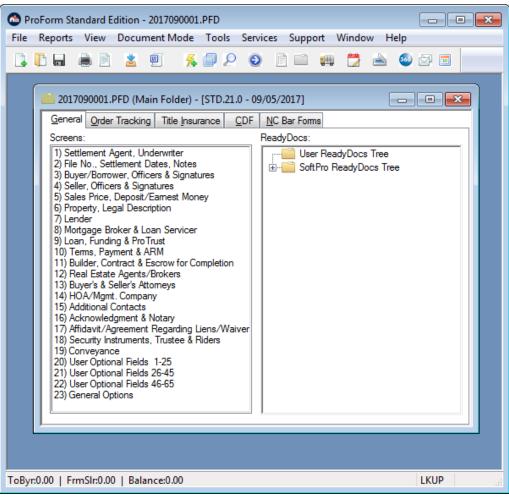
Summary

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.

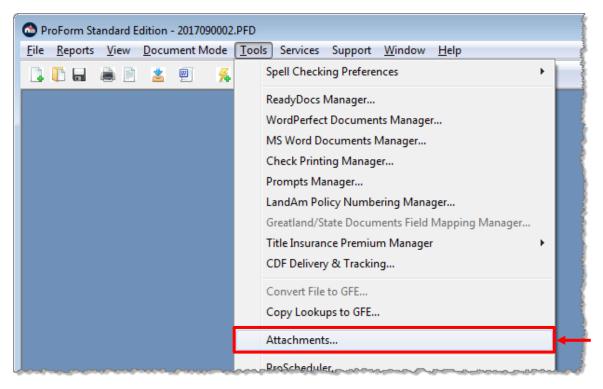
ProForm

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)	8
Guide.pdf	Description	Date/Time	
Guide.pdf	Stewart	09/08/2017 10:33	
	PatriotSearchUserGuide	09/08/2017 10:33	
And a series series and the final series series the series series to the series series	EncompassUserGuide	09/08/2017 10:33	
Search1.png			
Confirmati			
	View Atta	ich 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).Terms Payment & ARM	User ReadyDocs Tree SoftPro ReadyDocs Tree Bar Code Cover Order Tracking Dritle Insurance E

Print to Attachments

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

🙆 P	roForm Standard	Edition - 2017090001	.PFD		5
File	Reports View	Document Mode	Tools	Services	Supp
	New		Ct	rl+N	
	Express Order Er	itry	C	trl+E	
	Open		Ct	rl+O	N. C. C.
	Search		ļ	Alt+S o	oms
	Overlay File/Ten	nplate		-	
	Close]
	Save		C	trl+S	
	Save As				
	Export				
	Export PFD File f	or Support			
	Print		C	trl+P	Ì
	Print to PDF				1
	Print to Attachm	ients			← /
	Email Documen	ts	~~~~		

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)		٢
Available ReadyDocs:	Selected ReadyDocs:	
User ReadyDocs Tree SoftPro ReadyDocs Tree Bar Code Cover Order Tracking SoftPro ReadyDocs Tree Trile Insurance Scrow & 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)	-X
Description	Date/Time	
Stewart Patriot Search UserGuide Encompass UserGuide	09/08/2017 10:33 09/08/2017 10:33 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			×
	Select the contacts to incl	ude in the email:		
	Contact Type	Contact Name	Contact Email	
	 Title Company Mortgage Broker Buyer Additonal Contact 	Samantha Kalloway Donna Hue Paul Druthers Robert Xavier	Samantha.Kalloway@ Donna.Hue@myspac Paul.Druthers@geocit bob@titlecorp.com	
		ОК 🔶 Са	ncel	

- 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:

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:

🕭 Pro	Form Standa	rd Editio	on - 2017090001.PFD	- [20170	90001.PFD	(Má
- Fi	le Reports	View	Document Mode	Tools	Services	Su
	New			Ct	rl+N	1
G	Express C	rder Ent	try	Ct	rl+E	3
Sc	Open			Ct	rl+O	
	Search			A	lt+S	
2 3	Overlay F	ile/Tem	plate			į
4 5	Close					
6	Save			Ct	trl+S	4
1 2 3 4 5 6 7 8 9	Save As					
1	Export					4
1	Export PF	D File fo	or Support			America
1	Print			Ct	rl+P	-
1	Print to P	DF				1
1	Print to A	ttachm	ents			4.14-1
1	Email Do	cument	s		•	
2	Print Che	cks				

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)			—
Available ReadyDocs:		Selected ReadyDocs:	
TLTA Documents Escrow & Closing CDF Documents File Balance Sheet Cosing Disclosure Form (Purchase) Cosing Disclosure Form (Purchase), Pg 1 Closing Disclosure Form (Purchase), Pg 2 Closing Disclosure Form (Purchase), Pg 3 Closing Disclosure Form (Purchase), Pg 4 Closing Disclosure Form (Purchase), Pg 5 Closing Disclosure Form (Purchase), Pg 5 Closing Disclosure Form (Refinance) Closing Disclosure Form (Buyer) Closing Disclosure Form (Seller) Tax and Proration Summary	*	Closing Disclosure Form (Purchase), Pg 1 Closing Disclosure Form (Purchase), Pg 2 Closing Disclosure Form (Purchase), Pg 2a Closing Disclosure Form (Purchase), Pg 2b Closing Disclosure Form (Purchase), Pg 3 Closing Disclosure Form (Purchase), Pg 4 Closing Disclosure Form Addendum (Purchase) Closing Disclosure Form Addendum (Purchase)	Up Down
ок	Hel		

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 Contact Type	lude in the email: Contact Name	Contact Email	
 Title Company Mortgage Broker Buyer Additonal Contact 	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:

-	501	↓ 🗳	Ŧ	Untitled - Message (ł	HTML)	? 🛙	不 —		×
FILE	MESSAGE	INSERT	OPTIONS	FORMAT TEXT	REVIEW	DEVELOPER	8		
ت= Send	To Cc Subject	Samantha.k	(alloway@intern	et.org; Donna.Hue@	Pmyspace.com	; <u>Paul.Druthe</u>	ers@qeo	ocities.c	<u>om</u>
	Attached	CDF Purch	nase 201709000	1.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

<u>ALTA Endorsements</u>

- 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

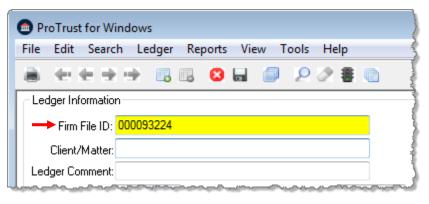
Tabs

<u>CDF Page 2</u>

• When **Paid By Others** was used in conjunction with the **Slr%** 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 E</u> dit <u>S</u> earch Le <u>dg</u> er <u>R</u> eports <u>V</u> iew <u>T</u> ools <u>H</u> elp					
	🔿 🐻	6		2 🧟 🛢 🦷)
Ledger Information					
Firm File ID:	000093224				
Client/Matter:					
Ledger Comment:					
Settlement Date:	11		Reminde	er Date: 🖊 🖊	
Buyer/Borrower:	Bob Buyer				
Seller:				Len	ider:
Property:				Loar	n #:
Trust Account:	TAC	-			Responsib
0 🖉 G					
Transaction	Number	Date	Cleared	Amount	Payee Name / Desc
Pending Check				150.00	June Schwinn

21.0.1 (10/18/2017)

STD.21.0.50912.1 (HF1)

Pro1099

- Added support for the 2017 tax year.
- Resolved a Pro1099 installation issue that occurred if a V20 Pro1099 was updated for the 2017 tax year, then was later upgraded to V21.

21.0.2 (11/8/2017)

STD.21.0.50912.8 (HF2)

ProForm

- Resolved a **Server Busy** error message that some users received when trying to launch ProForm after upgrading to V21. This error occurred when Outlook is installed but not configured for use. 419440
- If a user does not have Outlook installed or has it installed but not configured for use, the **Email** button on the **Attachments** screen and the **Email Documents** option on the **File** menu are now disabled. 419440

21.0.3 (2/7/2018)

STD 21.0.50912.12 (HF3)

ReadyDocs

- After a Windows 10 update to version 1703, text was being cut off at the margins of ReadyDocs when printing or viewing in Print Preview. In some instances, the document text spacing was appearing incorrectly and individual letters were too close together. *Resolved.* 408908
- ReadyDocs that had large sections of free text were experiencing issues with the text spilling over into the right margin after a Windows 10 update to version 1709. *Resolved*. 434791