SoftPro Select 4.1.5

Release Notes | July 25, 2016

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SoftPro Select v4.1.5 (4.1.40401.18)

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Summary of Changes

Documents

- A new **document bundle installer** allows for easier document management and installation to take place while users are actively working.
- A **My favorites** option has been added to the ProForm documents tree.
- **Documents & reports** may now be **rendered through the API**.
- **Documents may now be hidden** from the document tree if they're not applicable to a selected order.

Title

- The user may now **overlay exceptions and subordinate matters from another order or template's policy**, not just requirements and exceptions from another order or template's commitment.
- **Multi-select** has been added to requirement/exception overlay screen.
- **Lien release recording information fields** have been added to the Existing Liens screen.
- A **fee type** field has been added to the Additional Title Charges screen.
- The **CDF fee type** is now defaulted when sending from the **Premiums & Endorsements** screens.
- **Calculating & entering title premiums has been improved** on the Title Insurance Premium screen and related screens; final premium amounts are now sent to the payee/payor grids & registers.
- **Charges may now be sent** from the Additional Title Charges screen to HUD lines 1101-1108.

Closing Disclosure Form & Settlement Statements

- **Final premiums** can now be shown **in the debit columns on the settlement statements**, and a new **Disclosures Dialog** has been added to allow the user to edit these amounts.
- The **final premium amounts and splits** are now sent to the payee/payor grids and registers.
- An **Other** amount field has been added to the **percent charge**.
- The **seller pay % has been enabled in templates** to allow percent charges with commissions.
- **Fee types** have been added to each row in the Section E fee schedule grids.
- The first column of the **Projected Payments** section now allows the user to enter both Minimum and Maximum payments.
- A **CDF checkbox option** was added to **show/hide amounts of additional disbursements from broker's commissions** on document.

Technical Requirements

- **.NET Framework 4.6.1**: SoftPro Select 4.1 requires the **.NET Framework 4.6.1**, and will include it during the installation process.

  - **Supported** Operating Systems:
    - **Server**: 2012 R2, 2012, 2008 R2 SP1
    - **Client**: Win 10, Win 8.1/8, Win 7 SP1
  - **Unsupported** Operating Systems:
    - **Server**: 2008 SP2, 2003 SP2
    - **Client**: Win 7, Vista, XP
  - **Note**: This version of the .NET Framework is not supported with Exchange 2013. For more information, read this article at Microsoft.com.
- **Integrations**:
  - **SoftPro Select v4.1 contains major enhancements and API changes**. Customers with integrations will need to rebuild their integrations against v4.1 in the same manner as with prior releases that had a major or minor version number change.
    - **Note:** It will be necessary to target and recompile external code against .NET framework 4.6—NOT 4.6.1.
  - The **Select SDK** now requires **Visual Studio 2015**.
- **Database**: Changes have been made to the CDF forms and Settlement Statements.
  - If you have any custom versions of these forms, they will require upgrade by the custom reports team.
  - SQL Server 2005 is no longer supported.

(4.1) 4/16/2016

A number of new features and improvements are included with this release.

Documents

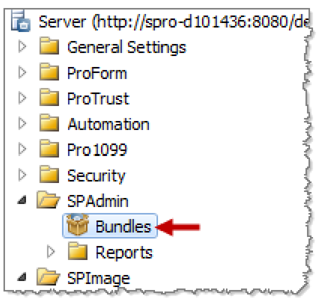
- Select now has a bundle manager in SPAdmin to aid in document installation.
- Users have been given new options for accessing document favorites.

Bundles

The new **Bundle** installer allows administrators to install and uninstall document updates at any time, including while users are in the application; there is no need to have the users exit before updating. Bundle files (.bnd) may contain ReadyDocs, ReadyBlocs, reports, tree definitions, & custom fields. *197877*

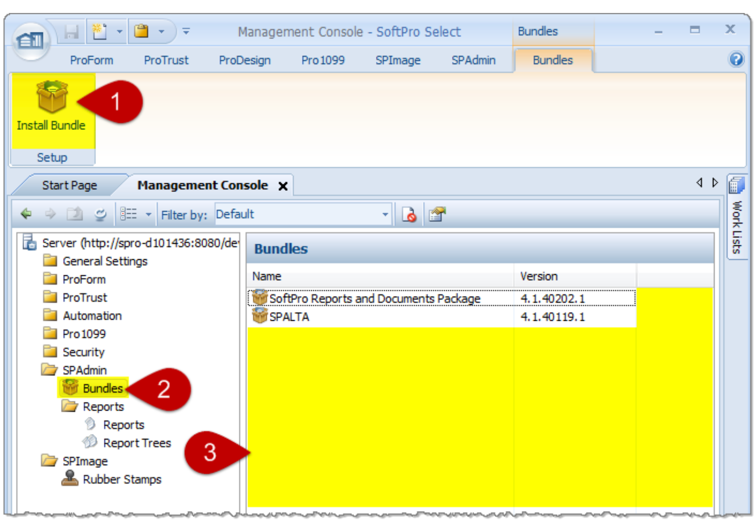
Bundle Manager

Viewing, **Installing**, & **Uninstalling** document bundles is now handled underneath the SPAdmin folder:



Bundle Installation Wizard

The application will walk you through the import process. With the appropriate permissions, an administrator can install or uninstall documents while users are still logged in to Select:

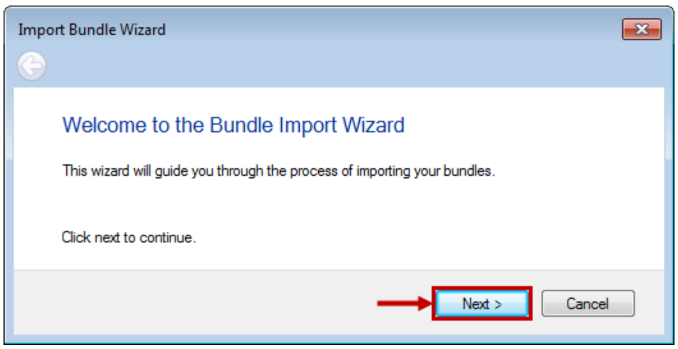


To launch the wizard, complete one of the following actions:

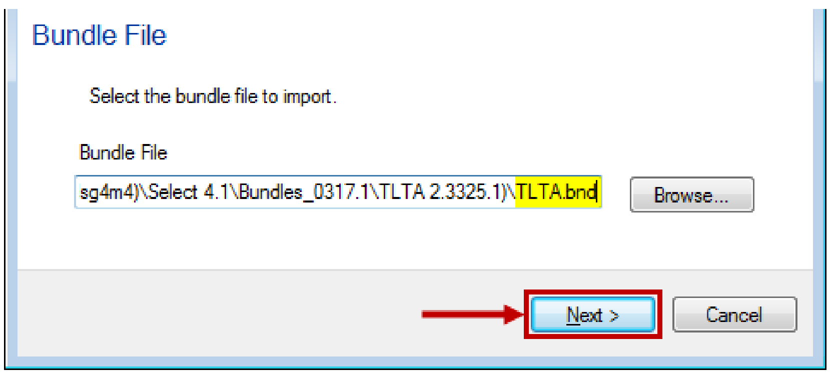
- Click the **Install Bundle in the ribbon,**
- Right click the **icon in the tree**, or
- **Right click in the white space** in the Bundles pane.

Installing a new bundle only requires a few clicks:

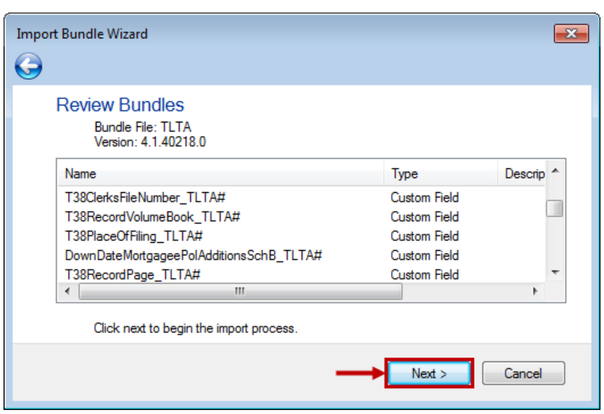
1. The first screen is a welcome screen. Click **Next**:



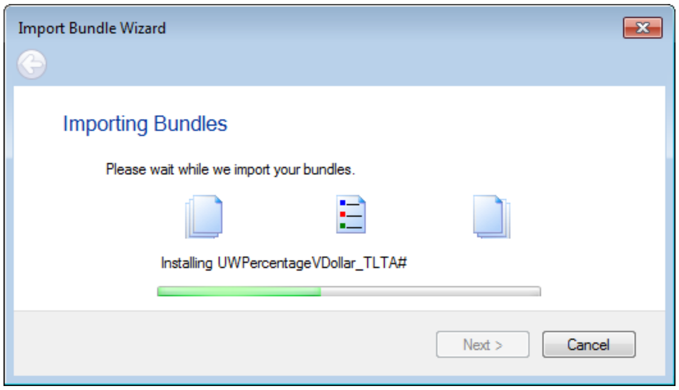
2. The second screen allows you to browse and confirm the **.bnd** bundle file that you wish to install. After selecting a .bnd, click **Next**:



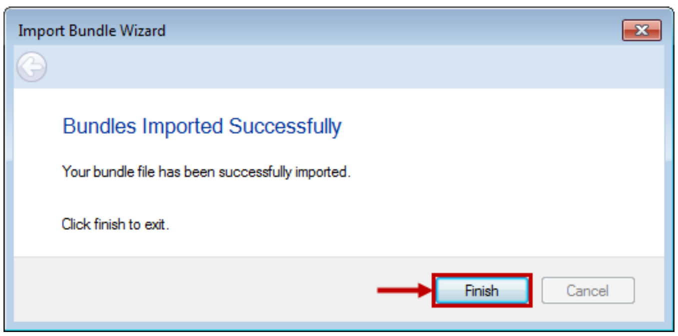
3. The wizard scans the bundle & allows you to review the package details. Click **Next** when ready:



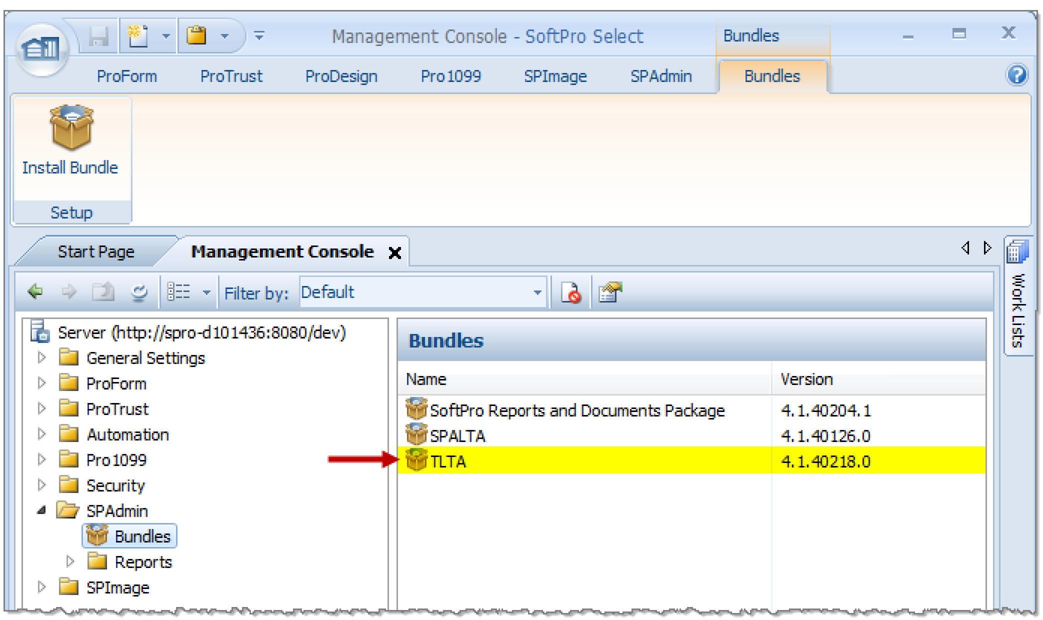
4. The import process will proceed **automatically**:



5. You will receive a message that the package was installed successfully. Click **Finish**:

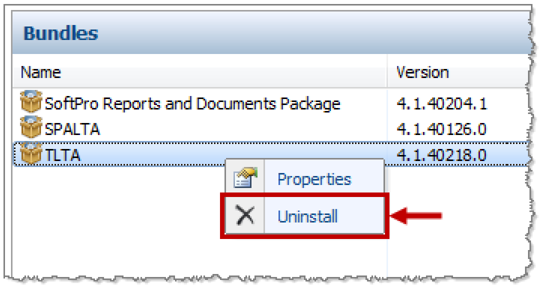


6. You can view the newly-installed bundle in the **Bundles Pane** at right. You may double click on the bundle name and open up the bundle properties dialog:



Bundle Uninstallation

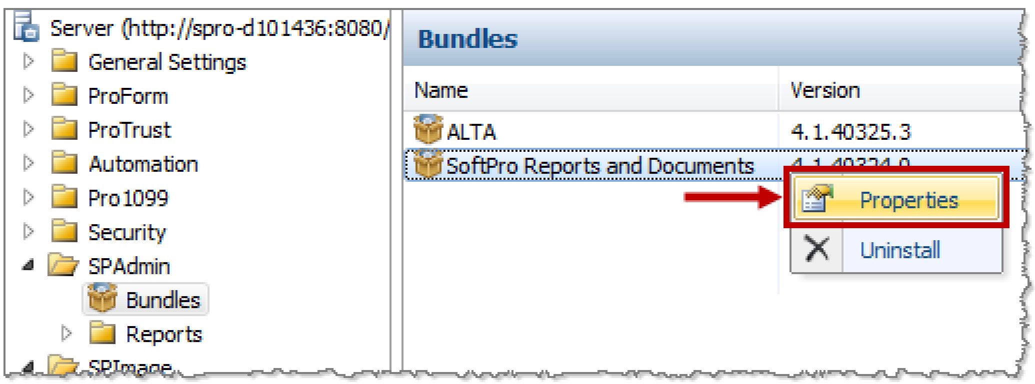
Uninstalling bundles may only be done by **right-clicking** a bundle in the **Bundles Pane** and selecting **Uninstall**. You will be prompted to confirm and then the program will delete the bundle:



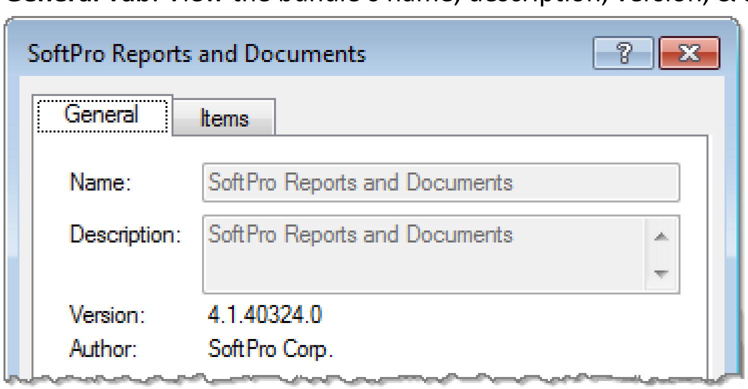
- Users are able to continue working with documents that are being uninstalled by an administrator—if the document(s) are open when the uninstallation begins—but once they close the document(s), the documents will disappear and be unavailable.

Bundle Properties

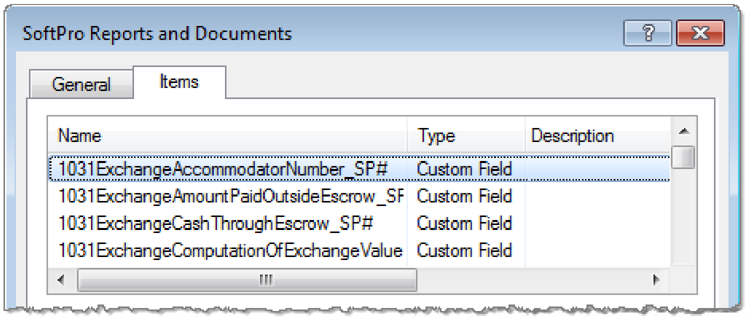
The properties of a given bundle may be viewed by **double-clicking** or by **right-clicking** and choosing the Properties option from the context menu:



- This will present a dialog for that bundle which contains **General** & **Items** tabs:
  - **General Tab**: View the bundle's name, description, version, & author.

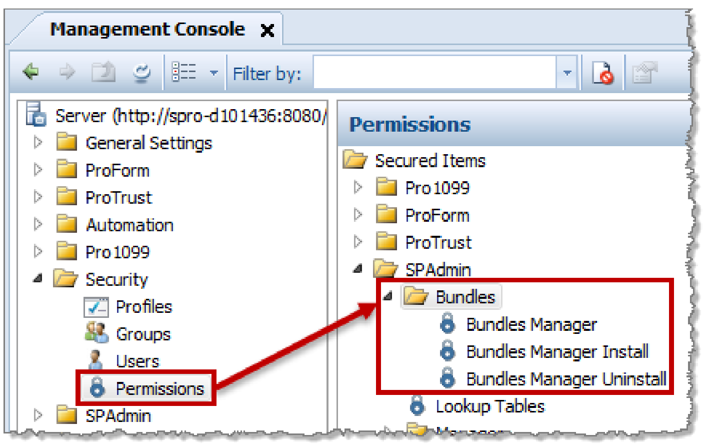


- **Items**: View all bundle contents by name, type (Custom Fields, ReadyBlocs, ReadyDocs, et cetera), & description.



Bundle Permissions

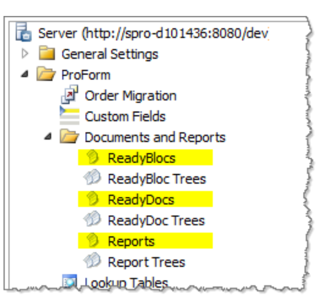
Three new permissions have been added to **SPAdmin > Bundles**:



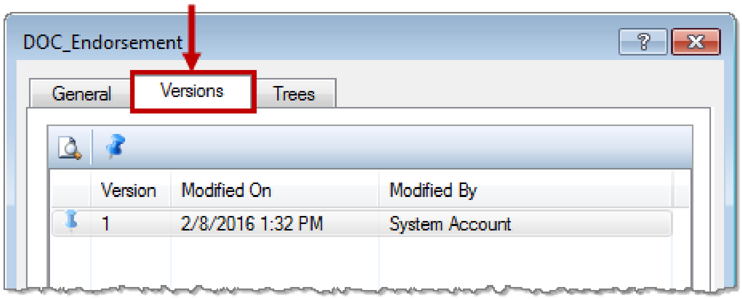
- **Bundles manager**: If this permission is granted, the user can **view** the Bundles Manager.
- **Bundles manager install**: If this permission is granted, the user can **install** bundles. The user also needs Bundles Manager permission to take this action.
- **Bundles manager uninstall**: If this permission is granted, the user can **uninstall** bundles. The user also needs Bundles Manager permission to take this action.

Versions

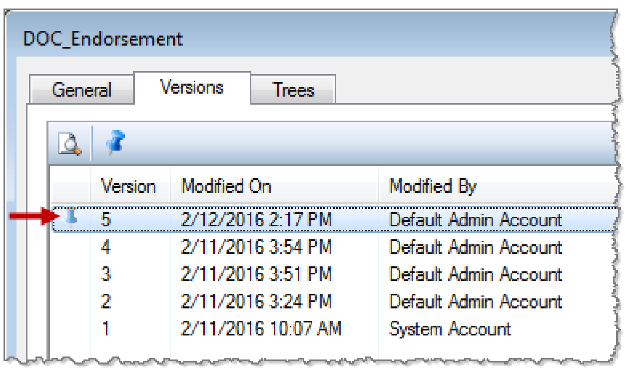
ReadyBlocs, ReadyDocs, and Reports now have a Versions tab available in their properties view.



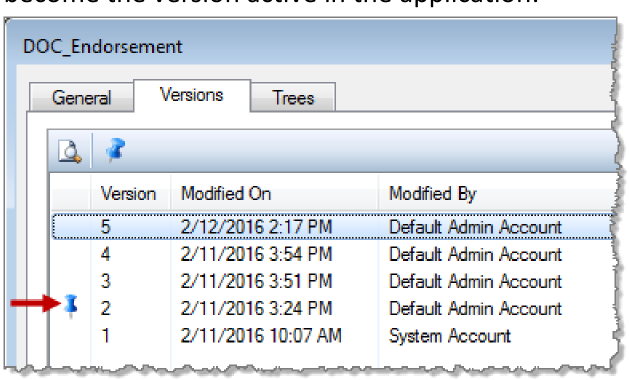
When accessing the properties for one of these document types, the user will see the new versions tab in the center of the dialog. For example, here's the tab as it appears on an endorsement ReadyDoc:



- **Preview**  : This button will open Microsoft Word and allow the user to view the document that is selected in the list. A document may be revised in preview mode and saved as a new document, but it will have to be imported into the documents folder before it can be used.
- **Pin/Unpin**  : This button allows the user to specify which version is being used in ProForm.
    - The pinned document will always be used, even when another bundle is imported.
    - By default, the most recent version is selected.



    - A user may pin an earlier version should they need to do so. This document version will become the version active in the application:

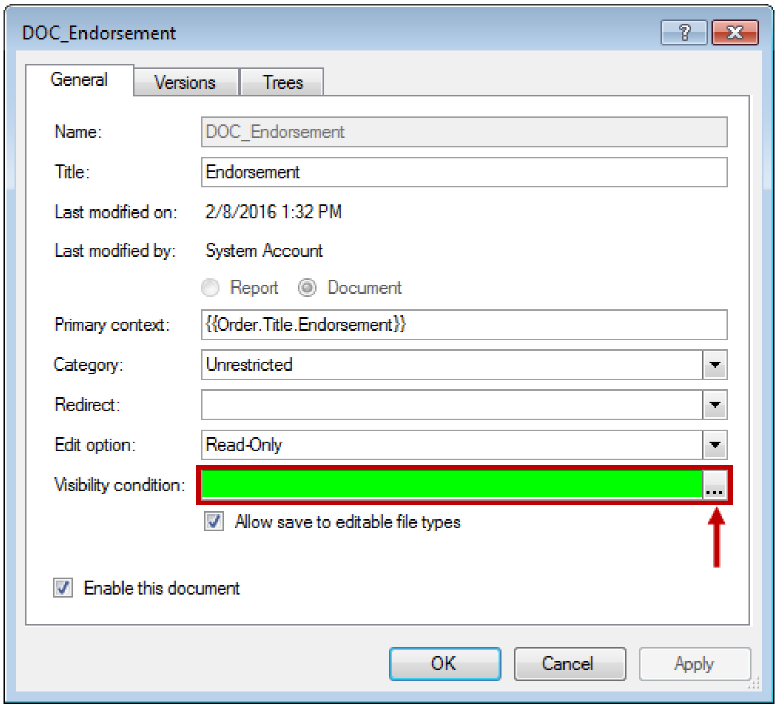


- **Version column**: Lists versions of the document that have been created.
- **Modified On column**: Shows the date and time that a document was changed.
- **Modified By column**: Lists the name of the user who changed a particular version.

Visibility Conditions

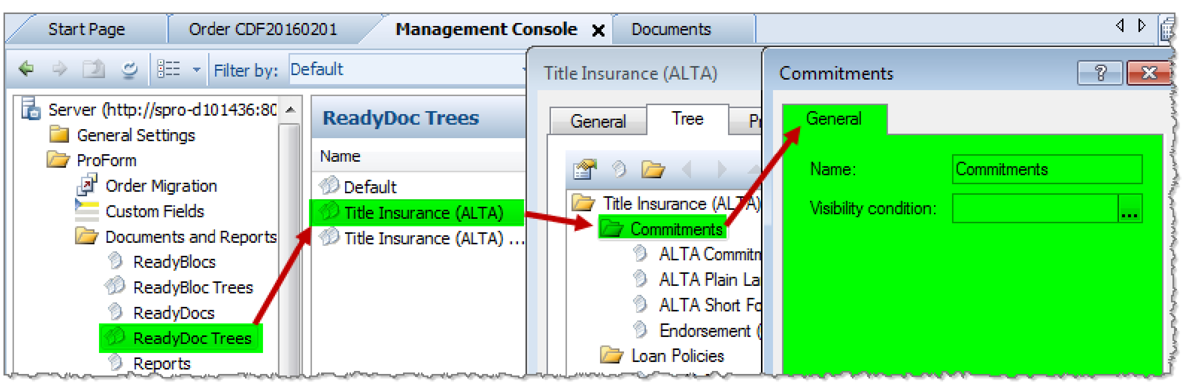
With this release, the user has an option to change the visibility of **individual ReadyDocs** and **ReadyDoc tree folders** with Python code. Code can be added and manipulated here to determine whether or not users see the corresponding documents & folders on the Documents screen in ProForm. *89401*

- **ReadyDoc Properties**: One of the final fields on this tab is the new visibility conditions option.



  - Typing or pasting directly into this field **will not** change the condition here. In order to create and edit Python code, you must use the expression editor, accessible through the ellipses button.

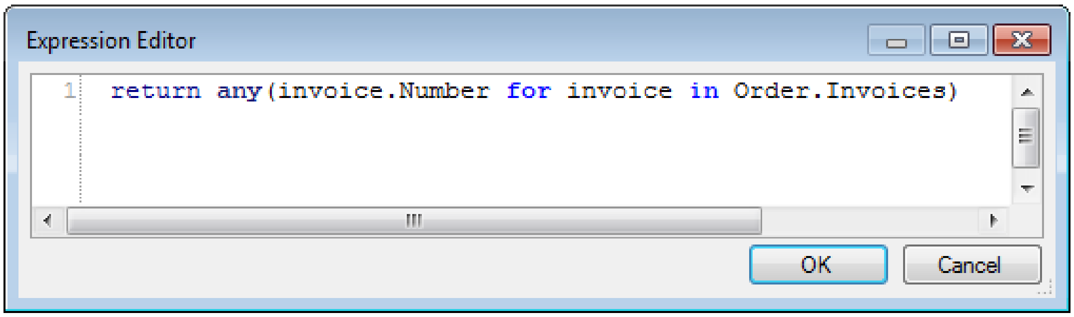
- **ReadyDoc Tree folder** properties: Opening a tree, then a tree tab, then viewing the properties on a folder will allow for editing the folder name and provide access to the expression editor:



  - Typing or pasting directly into this field **will not** change the condition here. In order to create and edit Python code, you must use the expression editor, accessible through the ellipses button.

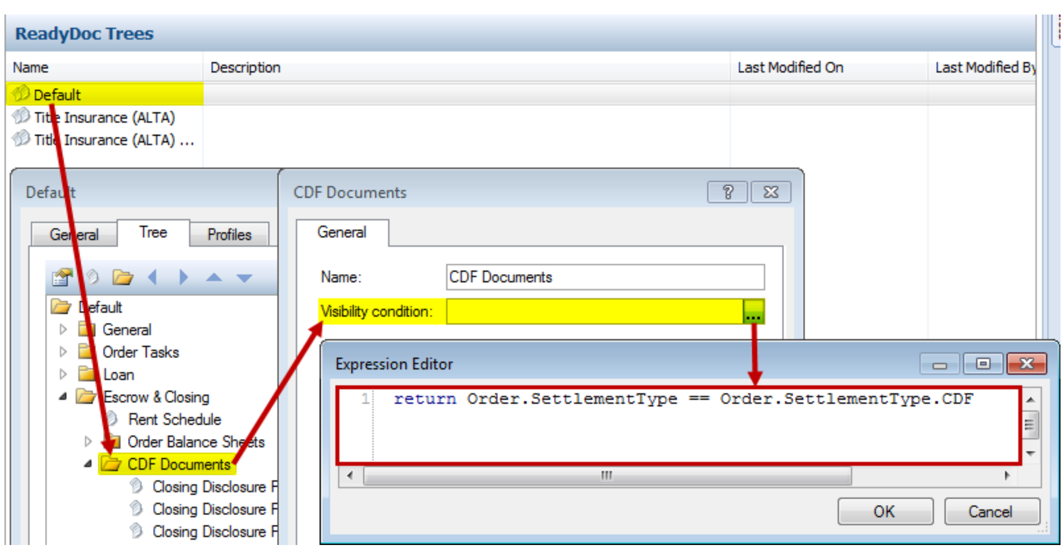
Expression Editor

This editor accepts expressions in simplified Python language:



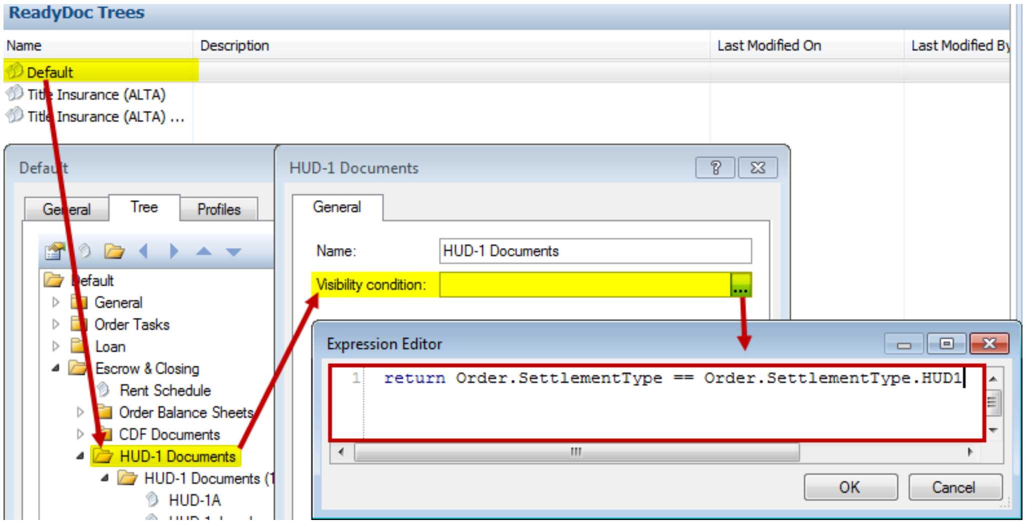
- Formulas may be copied and pasted into this scrollable text editor.
- Do not capitalize Python Keywords (i.e. return, if, else, and, or, is, in).
- Capitalization is required when using either True or False.
- Use capital letters when typing field codes as they appear in the Field code Browser (i.e. Order.TransactionType).
- Correct indentation is required.
- **Note**: Python is a standard scripting language and many free tutorials are available online. For SoftPro-specific questions about Python conditions, please refer to SoftPro's developer forum www.softprocorp.com/devforum.
- **Sample Expressions**:
  - **Default/Escrow & Closing/CDF Documents**: If the settlement type of the order is CDF, the CDF Documents will display:

```
return Order.SettlementType == Order.SettlementType.CDF
```



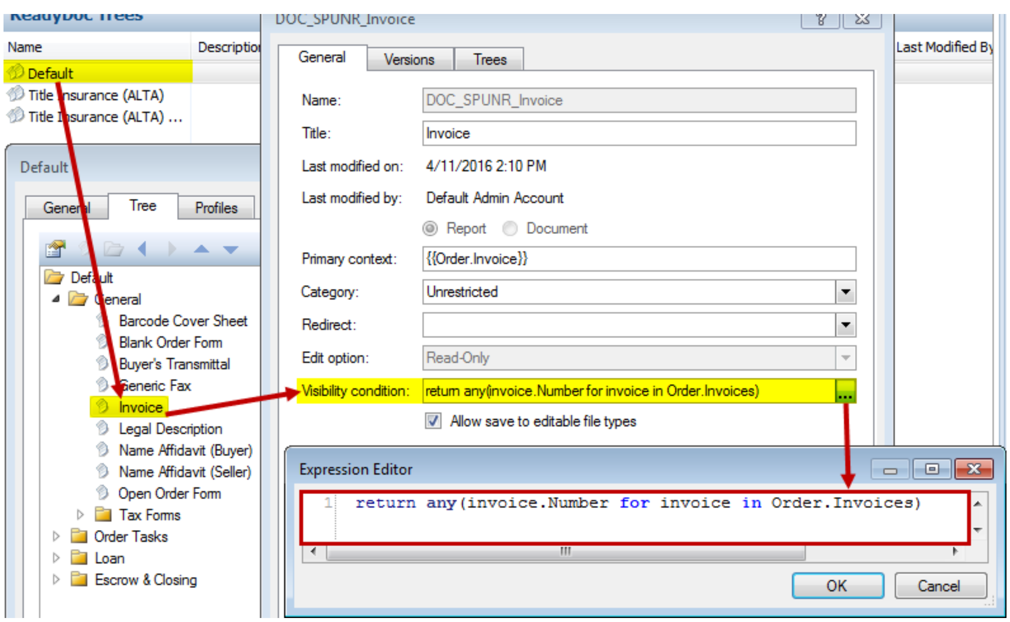
- **Default/Escrow & Closing/HUD-1 Documents**: If the settlement type of the order is HUD-1, the HUD-1 Documents will display:

```
return Order.SettlementType == Order.SettlementType.HUD1
```



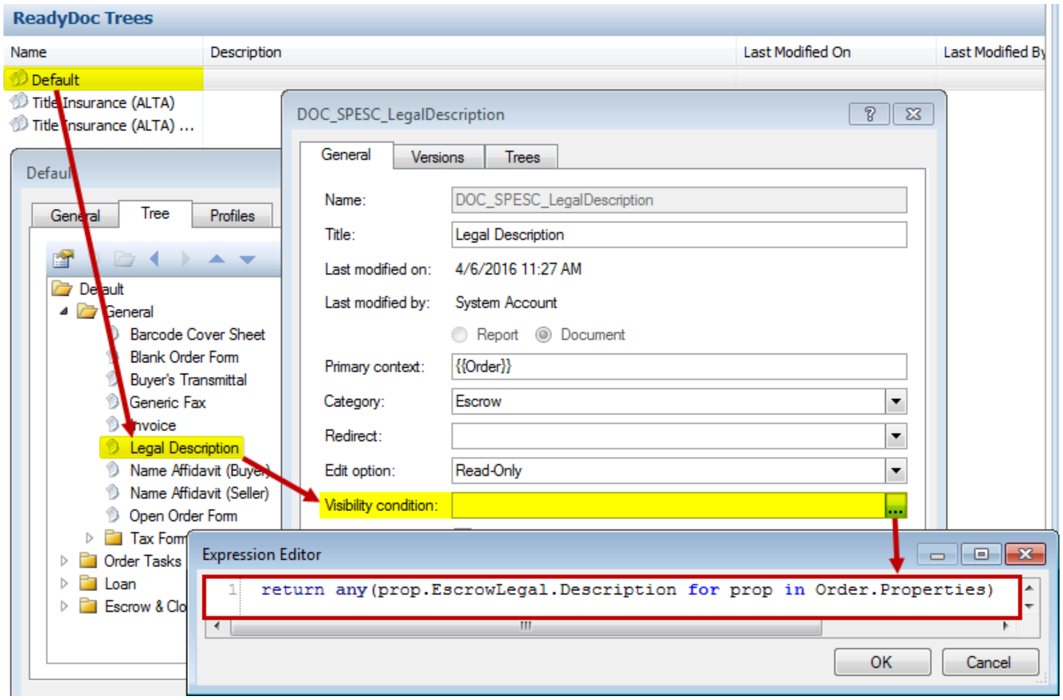
- **Default/General/Invoice**: Will display the Invoice doc **IF** an invoice exists on the order.

```
return any(invoice.Number for invoice in Order.Invoices)
```



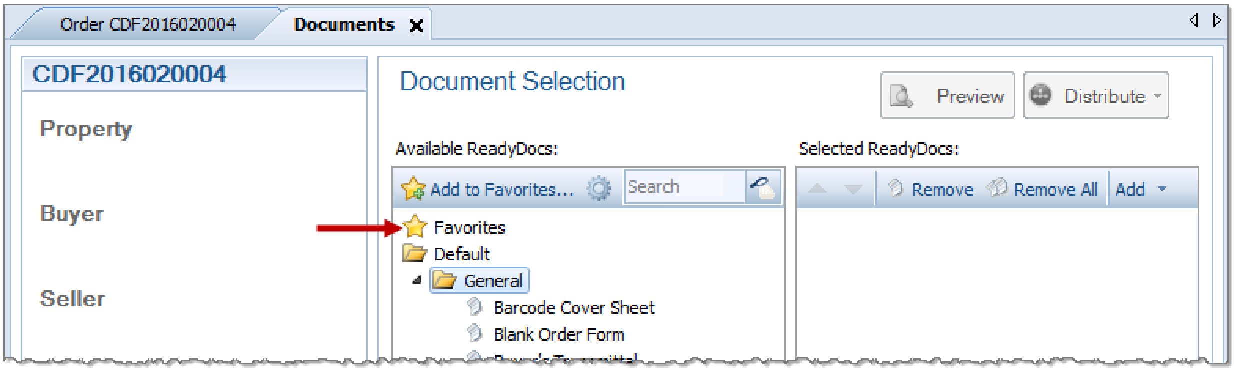
- **Default/General/Legal Description**: The Legal Description document will display **IF** a legal description for any property has been entered in the order.

```
return any(prop.EscrowLegal.Description for prop in Order.Properties)
```



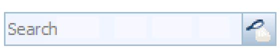
Document Favorites

Users can now create and maintain a folder containing their favorite/frequently-accessed documents. This option has been added to the Documents screen: 27343



Several items to note regarding Favorites:

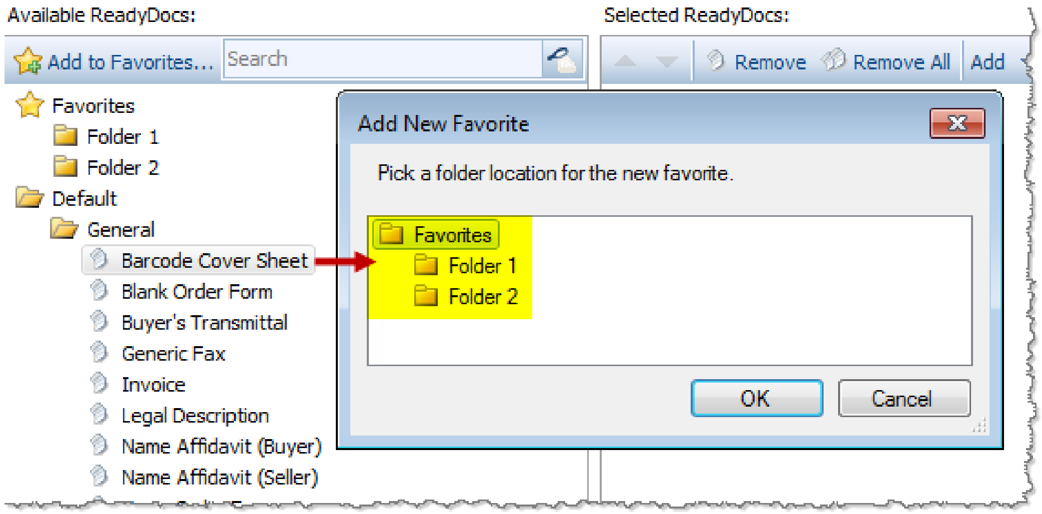
- It is **managed by individual users**.
- Users may **add new folders and documents and organize** however they wish.
- Users are free to **rename folders and documents**.
    - These custom names will only appear in an individual user's favorites; users cannot rename documents or folders for everyone else.
- **Favorites are saved in the user's remote profile** and can therefore be deleted with system changes. If this happens, they will have to be recreated by the user in Select.
- The **Search bar** will search the favorites folder & all other documents visible to the user.



Add to Favorites

- The user may add documents or folders with the **Add to Favorites** button 

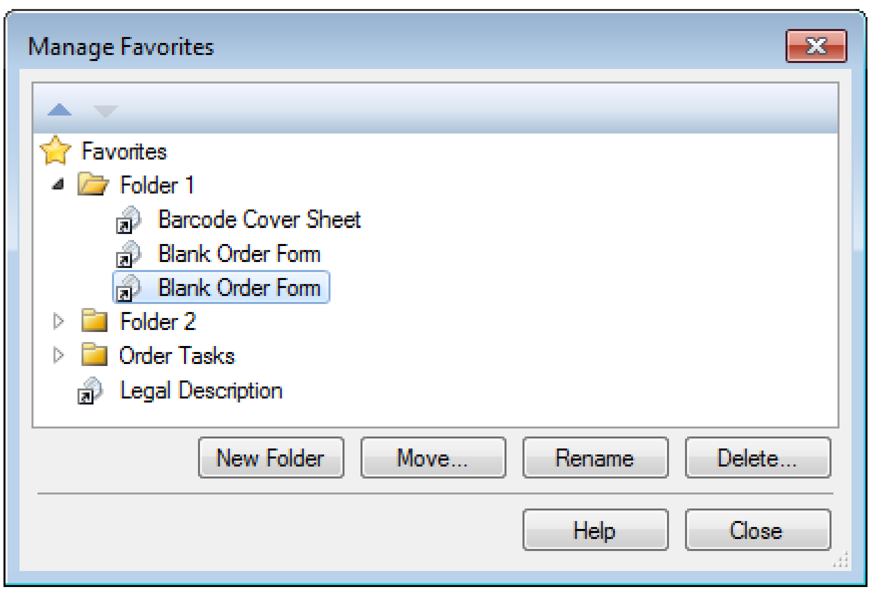
.
    - Users may also **drag &** drop documents or entire folders from the tree into their favorites area.
- Only one document or folder may be added at a time; the user will have to specify where in their favorites they wish to save the new item:



- If a folder is selected & added, it will be added along with all the documents it contains.

Manage Favorites

- Users may organize, rename, or delete items by using the **Manage Favorites** button :



  - **Folders and documents may be moved** by using the **arrows** at the top of the dialog, **dragging and dropping** them in different areas, or by using the **move** button.
  - **Folders and documents** may be deleted and renamed via the buttons at the bottom of the dialog or by right-clicking.

Other Changes

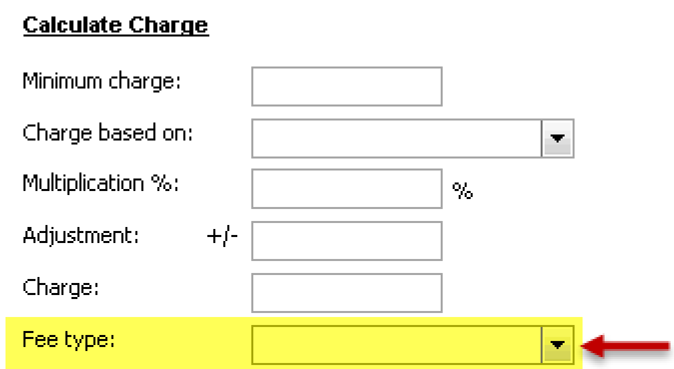
- Extremely long legal descriptions were not rendering correctly as attachments; resolved. *261120*
- Spacing issues were occurring on documents with prompts after retrieving requirements or exceptions containing formatted text. *290193*

Title Insurance

The **Additional Title Charges screen** has been modified, the **Title Overlay process** has been improved, **Lien release recording information fields** have been added to the **Existing Liens**, and **entering title premiums** has been improved on the **Title Insurance Premium screen** and related screens.

Additional Title Charges

- A **Fee type** drop-down field has been added in the **Calculate Charge** section. When a fee type is selected here, the fee type will be sent to the selected CDF line: *306862*



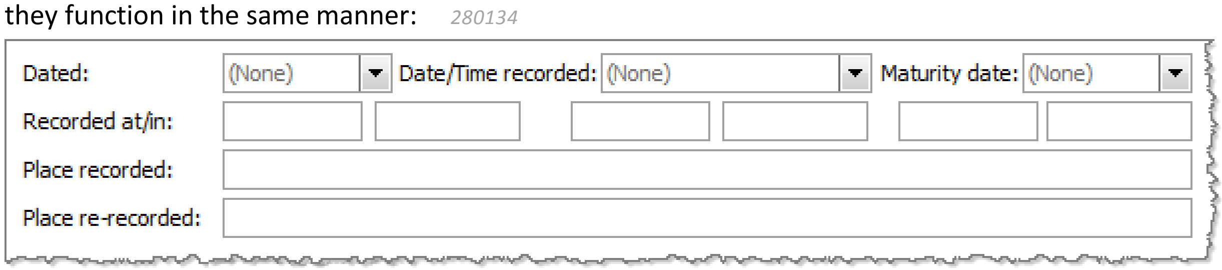
- A change was made to allow users to **send Additional Title Charges** to lines **1101-1108 on 1986 HUD orders**. *308236, 298615*

Fee Types

- CDF fee types default as follows when sent from the Premiums & Endorsements screens. *281190*
    - **Loan policies**: Title Lenders Coverage Premium.
    - **Owner's policies**: Title Owners Coverage Premium.
    - **Endorsements (all)**: Title Endorsement Fee.

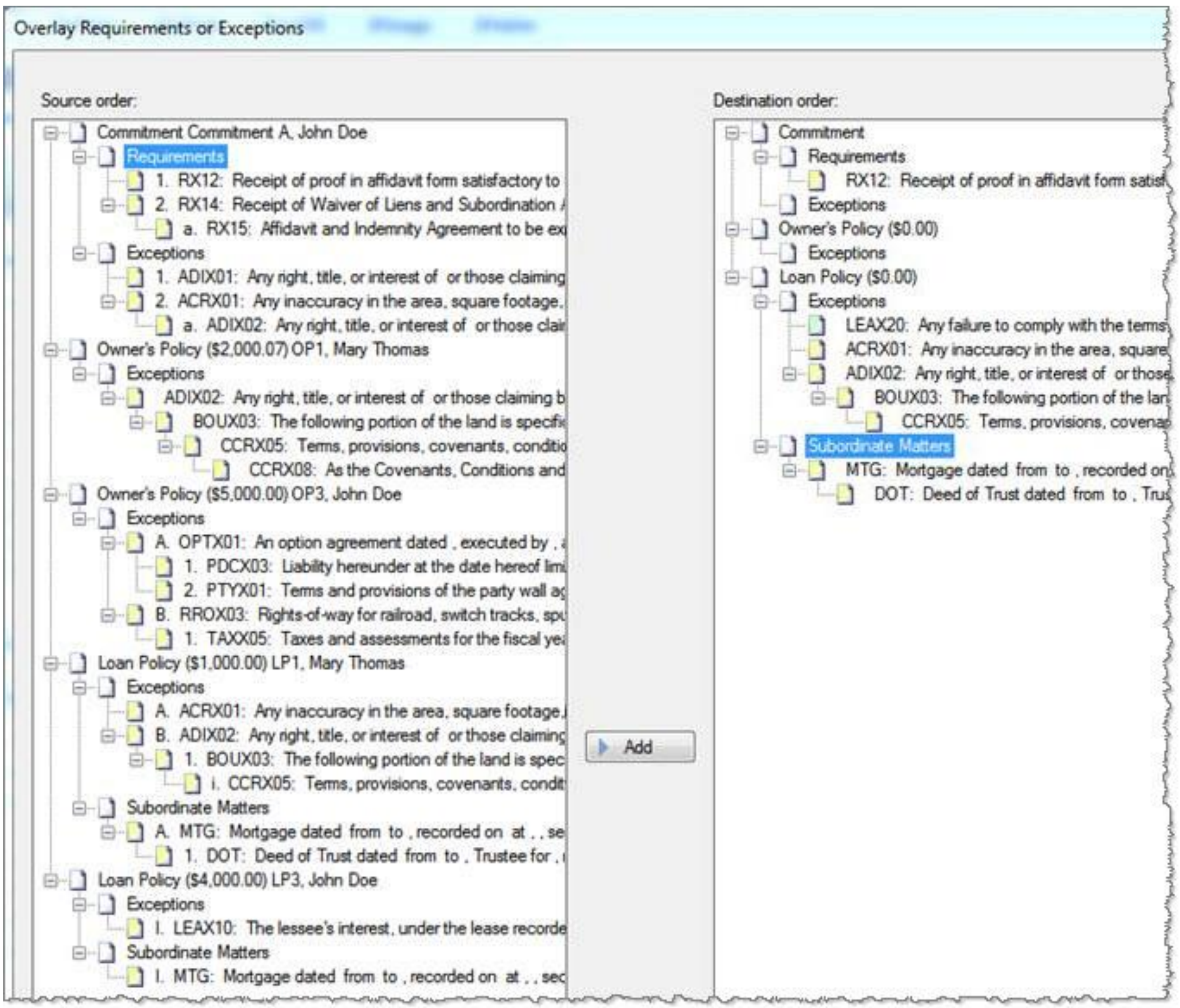
Existing Liens

- A new set of fields has been added to the Existing Liens screen. The **Lien Release Recording Information** contains the same fields that are included in the **Recording Information** section and they function in the same manner: *280134*



Title Overlay

- When overlaying title product items, the user may now drag and drop (or press Add) to include the following from the source order tree to the destination order tree: *64903, 13646*
  - **individual items**,
  - **multiple items**,
  - all items related to **a commitment** by selecting the Commitment node,
  - all items related to **requirements** by selecting the Requirements node,
  - all items related to **exceptions** by selecting the Exceptions node,
  - all items related to **owner's policy** by selecting the Owner's Policy node,
  - all items related to **loan policy** by selecting the Loan Policy node,
  - all items related to **subordinate matters** by selecting the Subordinate Matters node.
    - **Screenshot below:**



Premiums

Several changes have been made to how title insurance premiums are handled.

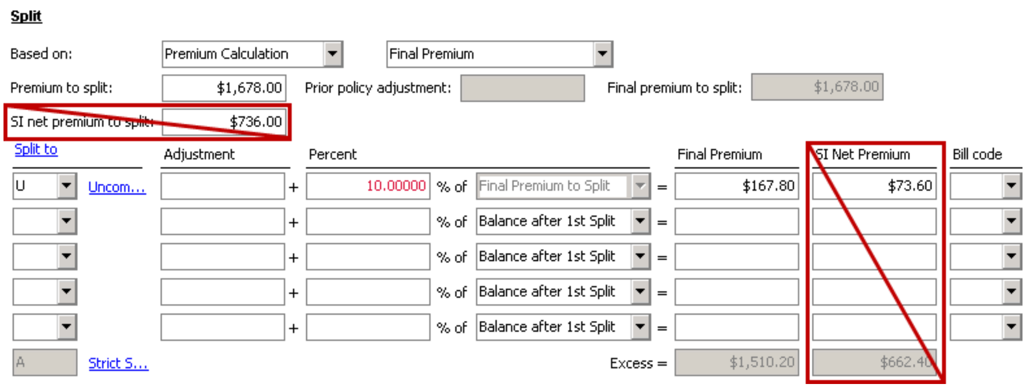
Splits

- **CDF Regulations**: Recent federal regulations require that title insurance premiums be disclosed on the Closing Disclosure form in a specific way for simultaneous issues:
    - The **loan policy premium amount** must reflect what the premium would be if it were not a simultaneous issue.
    - The **owner's policy premium** must reflect the difference between that loan policy premium and the total cost of the two policies under a simultaneous issue.
- **Select version 4.0**: With this previous release of the software, the regulated premiums were reflected in the CDF lines, payor/payee grids, and register.
- **Select version 4.1**: With this current release, we made a change to show the traditional premiums on the CDF payor/payee grids and in the register so that all disbursements and revenue reports reflect the final premiums.
    - With CDF Simultaneous Issue policies, when the **Show full premium on CDF/HUD-1** checkbox is checked, the **final premiums** will be sent to the **payor/payee grids on the CDF lines** instead of the **SI net owner's premium/Full loan premium**.
    - This will make tracking premiums and handling accounting easier, as **the premiums in these areas will be the real premiums instead of the CFPB-regulated premiums**.
    - The **SI net owner's premium** and the **Full loan premium**, however, are still shown on the CDF line for purposes of the regulatory requirements of the CDF document.
    - Since there is no longer a need for the **SI Net Owner's premium** and the **Full Loan premium** splits, they were removed.

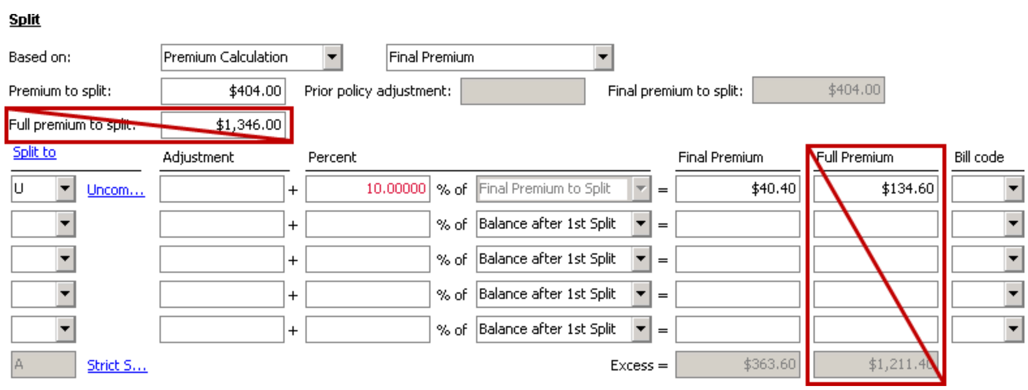
Title Insurance Premiums & CDF Page 2

These changes only apply to 4.1 CDF orders and templates for Simultaneous policies when the "Show full premium on CDF/HUD-1" checkbox is checked; CDF orders and templates created in previous versions will still show the splits sections containing the previous field configurations.

- The **SI net premium to split field** & **SI Net Premium column** have been removed from the Owner's policy. The **Final Premiums** are now sent to the **CDF payee/payor grids** & **register**:



- The **Full Premium to split field** & **Full Premium column** have been removed from the loan policy. The **Final Premiums** are now sent to the **CDF payee/payor grids** & **register:**



- **Payors/Payees grids**: The CDF Payors and Payee grids now reflect the final premium amounts, not the CDF-disclosed amounts.
- **A new Disclosures dialog was added**: This dialog provides a view into both the owner's and loan policy premiums, including the traditional amounts and the CFPB regulated amounts, seller pay percentage and amounts, paid by buyer, seller, and other amounts, and POC amounts.
- See examples section.

Title Insurance Premiums Disclosures Dialog

This new dialog provides a view into the **title premiums as they will appear on the CDF lines and settlement statements**, including line details on **CDF page two**, **three**, and the **Register**.

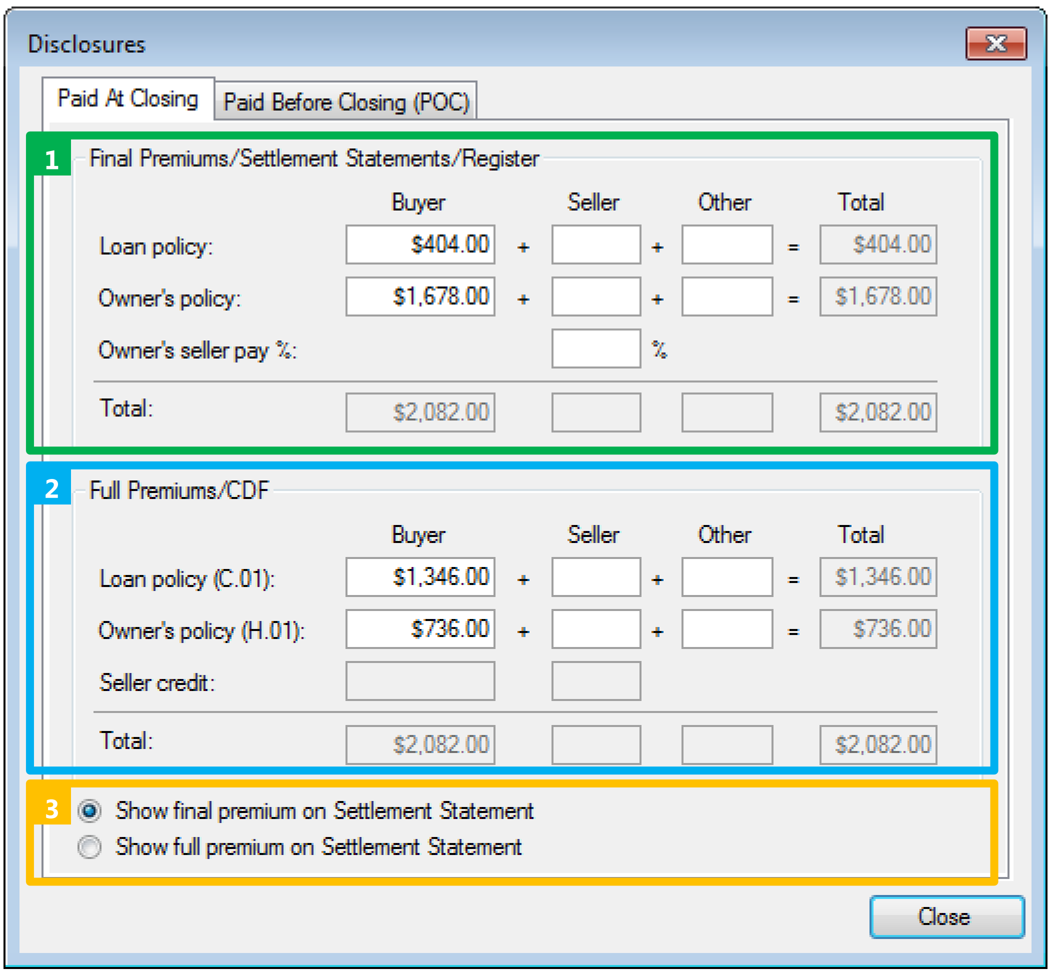
- The disclosures dialog shows both the loan and owner's final and full premiums as they appear on the Title Insurance Premiums screen. The premiums can be edited on this dialog if Paid Before Closing, Paid by Others, or Paid by the Seller.
    - It is **not necessary** for users to enter/alter information in this dialog.
- The dialog is available on CDF orders when the **Show full premium on CDF/HUD-1** option is checked on the Title Insurance Premiums screen.

- This dialog does not write *back* to the Title Insurance Premiums (TIPS) screen. The *general* flow of data proceeds from the Title Insurance Premiums screen → Disclosure Dialog → CDF screens.
  - The Seller % is one exception; it will write back to the Title Insurance Premiums screen.
  - Another exception is that editing amounts on the CDF charges will always write back to the Disclosure dialog's CDF fields.
  - Note that you may always press the F2 key to reset the disclosure dialog fields with data from the Title Insurance Premiums screen.

Disclosures Dialog Details

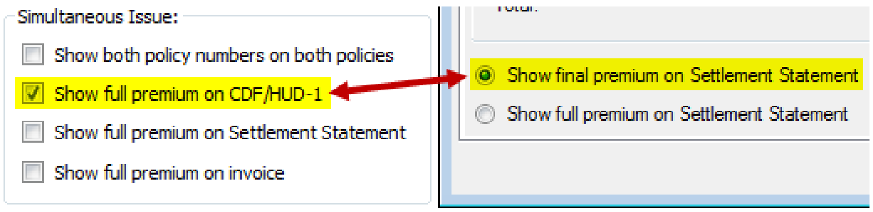
The data entered for the basic title order example below will appear in the dialog as shown below.

- **Paid at Closing**: This tab provides a breakdown of the Final Premium/Settlement Statements/Register amounts as well as Full Premium/CDF amounts:

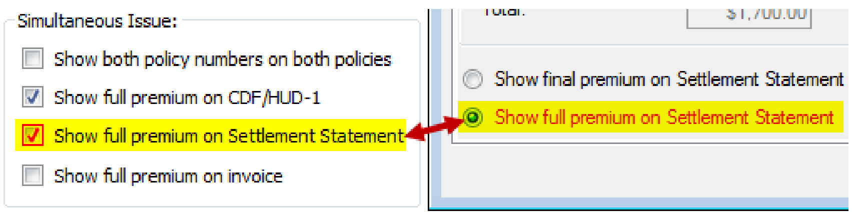


1. **Final Premiums / Settlement Statements / Register**: This section reflects the data that will flow into the settlement statement & Payor grids on the CDF as well as the register.
2. **Full Premiums / CDF**: This data flows into the CDF lines/charges; changing this information on the CDF will also flow back into this dialog.

3. The **Show final premium on Settlement Statement** and **Show full premium on Settlement Statement** options are related to the Simultaneous Issue checkboxes on the TIPS screen; these **checkboxes/radio buttons stay in sync** with one another.
    - When the radio buttons are changed on the Disclosures dialog, the checkboxes on the Title Insurance Premiums screen will change, & vice versa.
    - The radio buttons on the **Disclosures dialog** always tie to the **Show full premium on Settlement Statement** checkbox on the Title Insurance Premiums Screen.
        - **If unchecked**, the top radio button is selected.
        - **If checked**, the bottom radio button is selected.

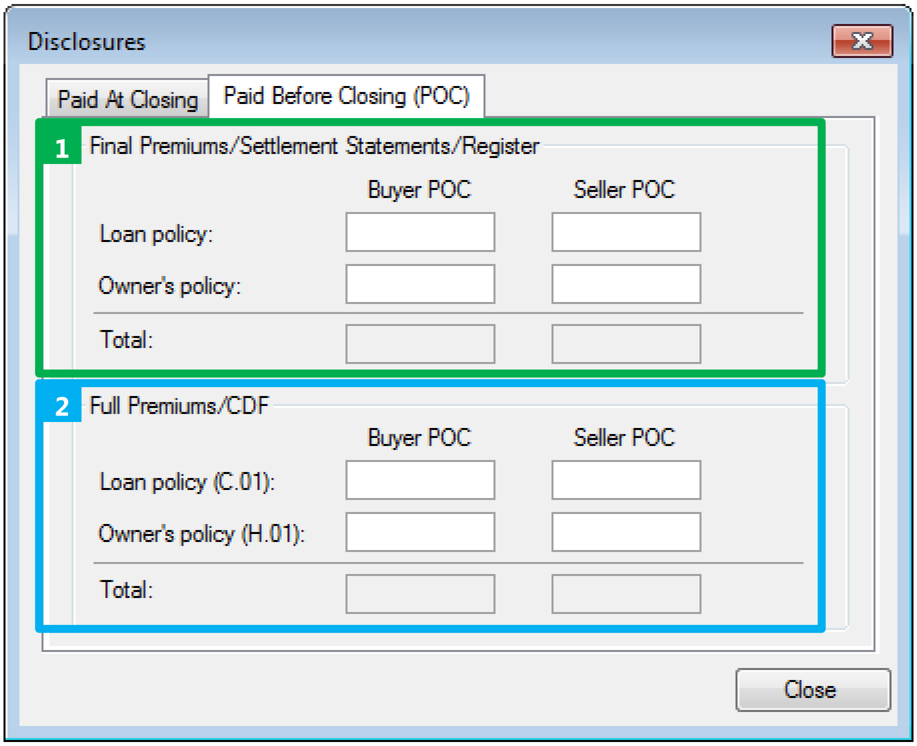


    - Here, the **second radio button** is selected on the Disclosures dialog, and the Title Insurance Premiums Screen checkbox synced automatically:



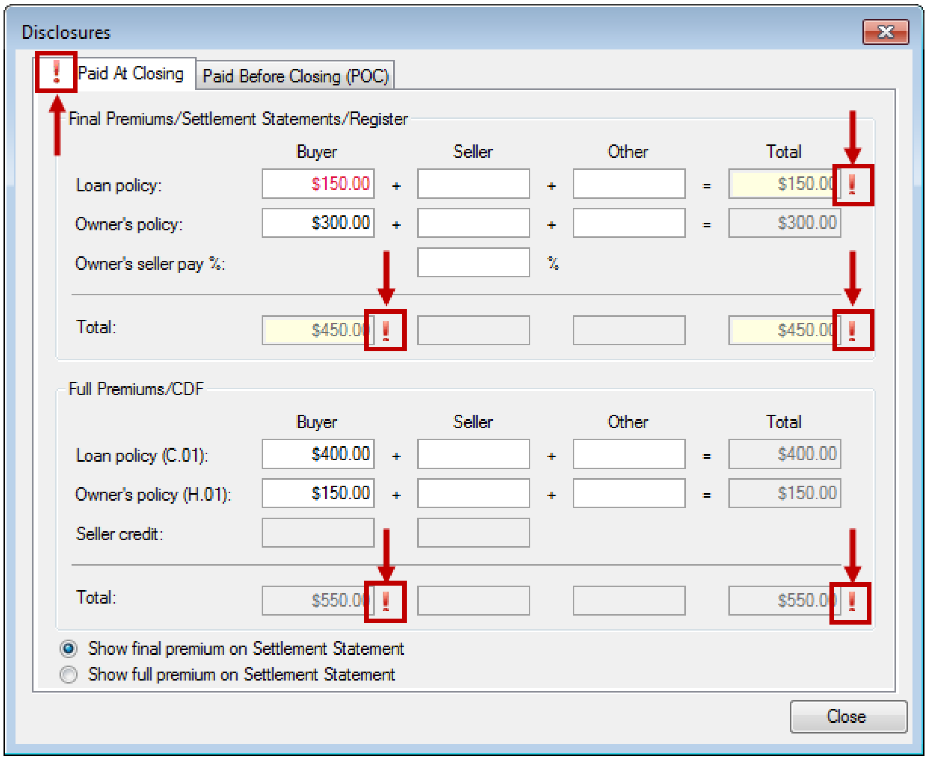
    - **These two items do not impact the Individual Buyer and Seller Statements**; these documents will always print the final premiums.

- **Paid Before Closing (POC)**: This tab provides a breakdown of the Paid Before Closing (POC) Final Premium/Settlement Statements/Register amounts as well as Full Premium/CDF amounts:

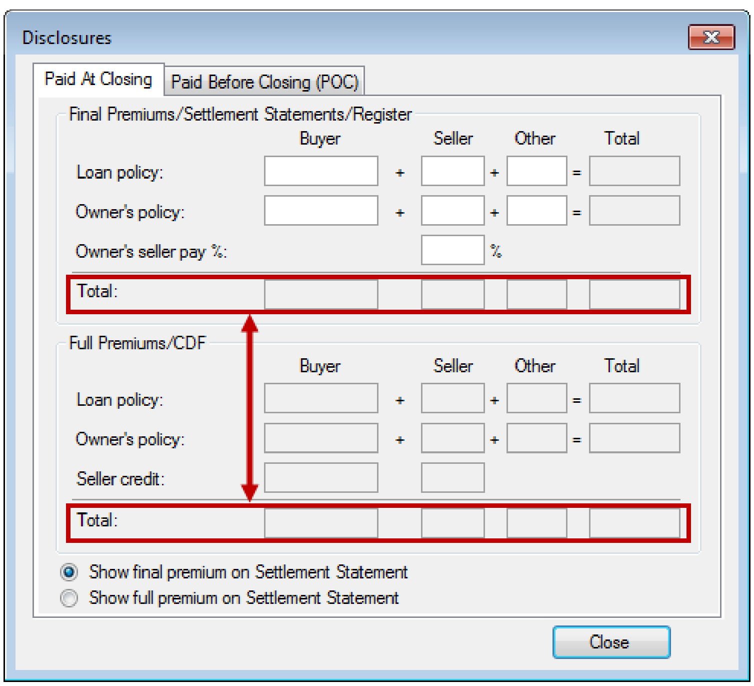


1. **Final Premiums / Settlement Statements / Register**: Any monies remitted outside of the closing by the buyer or seller may be input here and will flow into the payors grid under the related CDF charge.
2. **Full Premiums / CDF**: Any monies remitted Outside of the Closing by the Buyer or Seller may be input here and will flow into the CDF line/charge.

- **Validations**: If amounts on this dialog are out of balance in some way, validation icons will appear in the tab(s) at the top of the dialog as well as next to each field that has a problem; problematic fields will also be shaded yellow:



- In order to remove these validation errors, adjustments must be made to ensure that the **Total rows** at the bottom of each section (Final Premiums/Full Premiums) match:

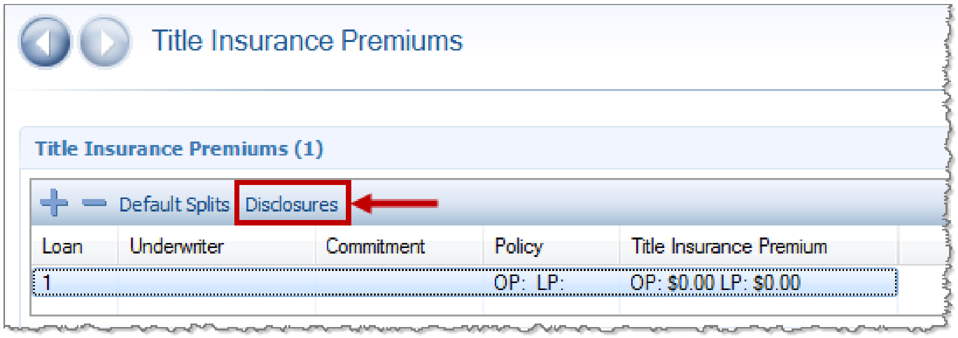


- The Total of the **Loan Policy Final Premium** much match the **Final loan premium** on the Title Insurance Premiums Screen.
- The Total of the **Owners Policy Final Premium** must match the **Final owner's premium** on the Title Insurance Premiums Screen.

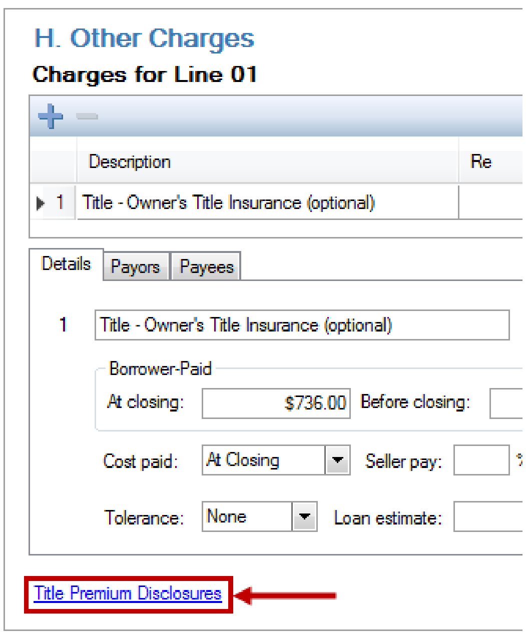
Dialog Access

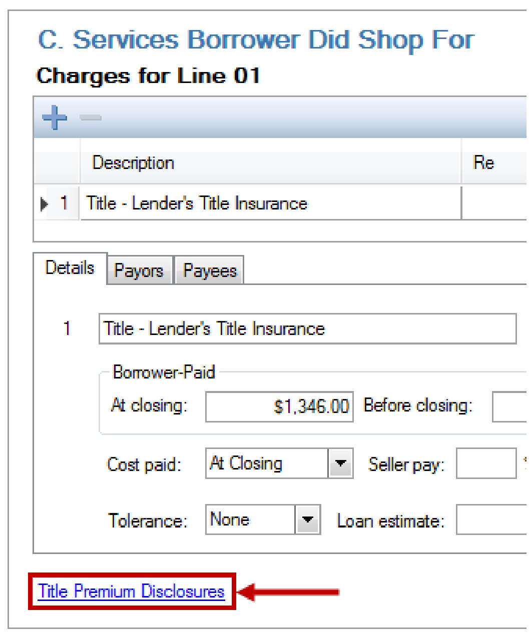
The dialog is accessible from several locations:

1. **Keyboard shortcut**: **Ctrl** + **Alt** + **D** will display the Disclosures dialog.
2. **Title Insurance Premiums Screen**: the **Disclosures** button at the top of the screen will pull up the dialog:

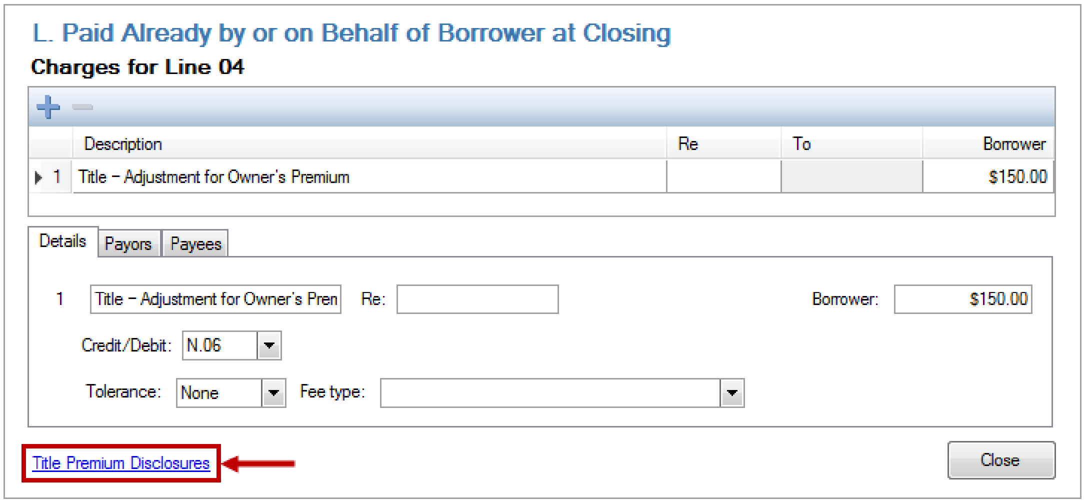


3. **Charge dialogs** reflecting charges sent from the **SI policy premiums**:





4. **Charge dialogs** reflecting charges sent from the **SI policy seller credit**:

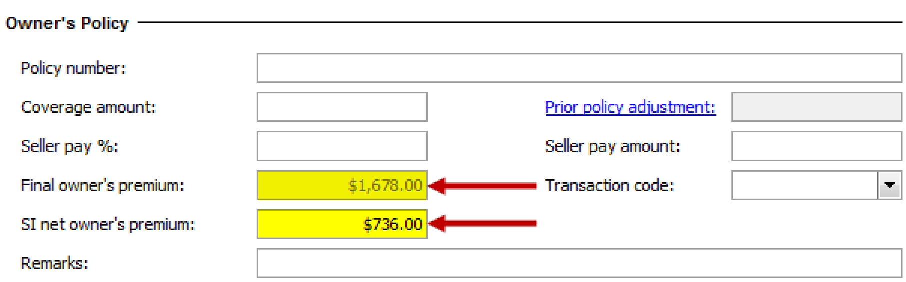


Examples

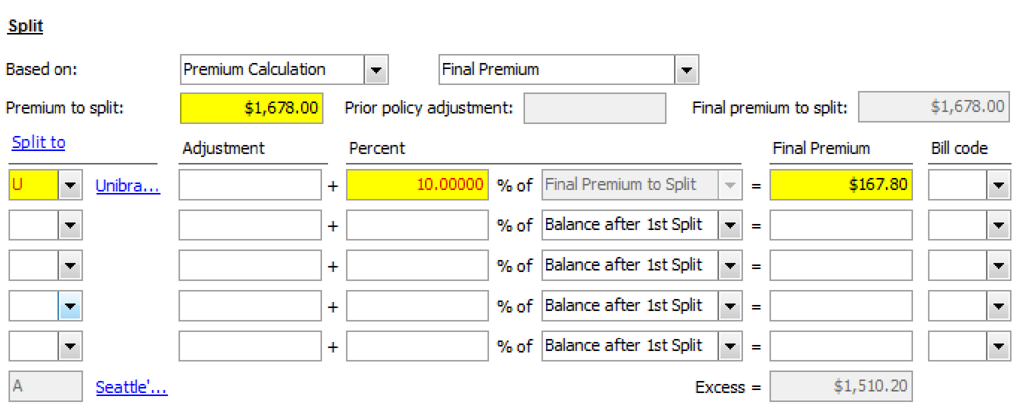
Basic Title Order

This example walks through a simple title policy to demonstrate the changes present in this release.

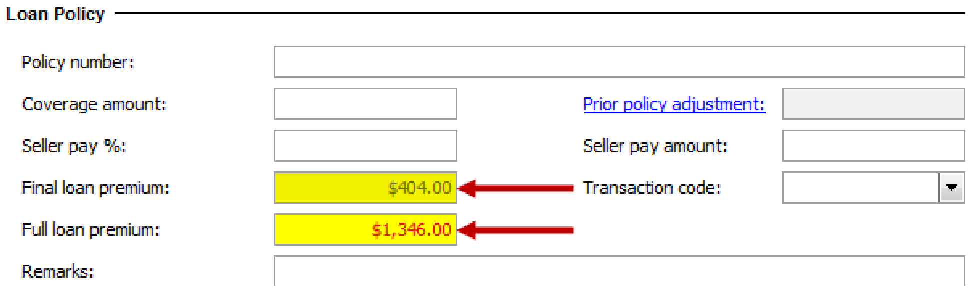
- **Title Insurance Premiums Screen**: a simple simultaneous issue policy was created.
    - **Owner's Policy**: A final owner's premium of $1,678 is present, along with a SI net owner's premium of $736:



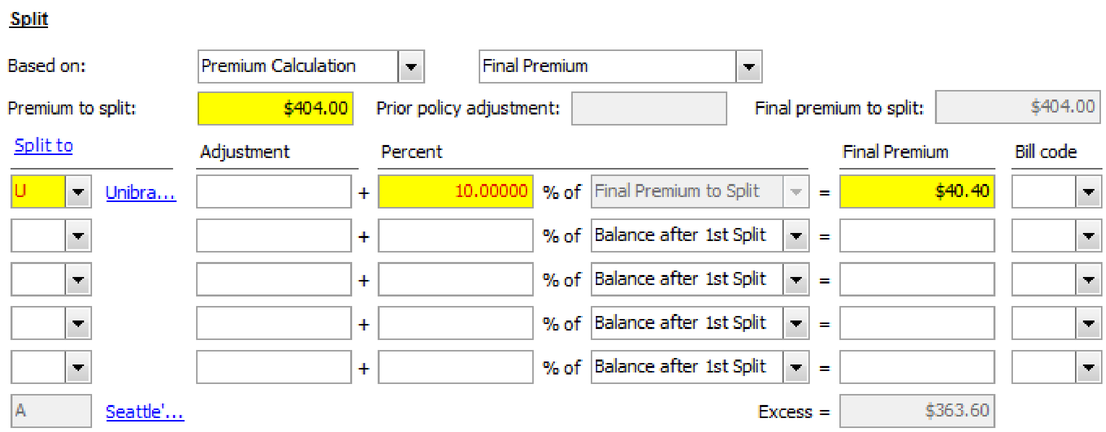
    - **Owner's Policy Split**: A 10% split is assigned to the underwriter:



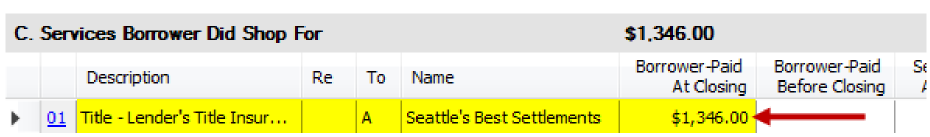
- **Loan Policy**: A $1,346 Full Loan Premium and Final Loan Premium of $404 are present:



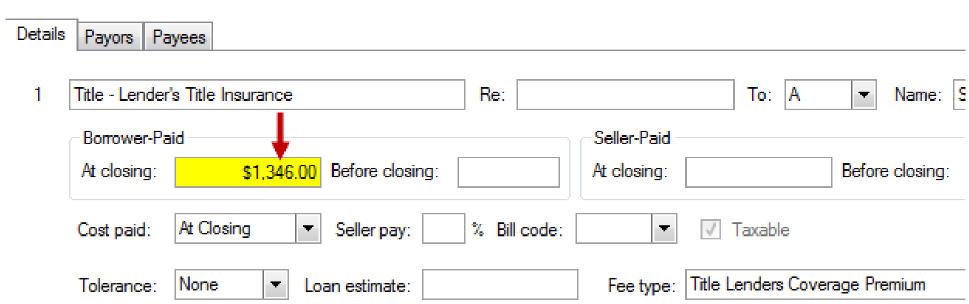
- **Loan Policy Split**: A 10% split is assigned to the underwriter:



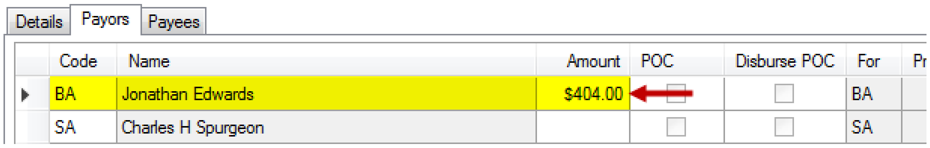
- **CDF Page 2**: Title premiums and splits now display a bit differently on the CDF screens. The manner in which amounts are sent to the CDF Screen amount columns—and likewise the CDF documents—is exactly the same as before; **all that has changed are the payee/payor grids**:
  - **Section C. Services Borrower Did Shop For**: The **Full Loan premium** displays on the CDF line:



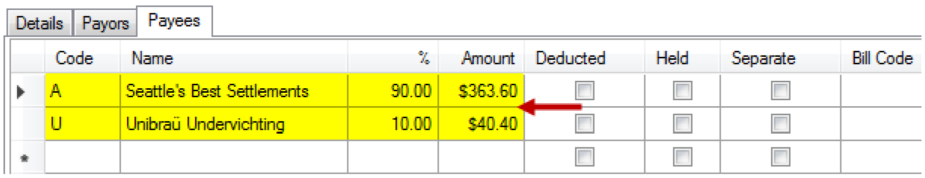
    - **Details Tab**: The **full loan premium** also displays in the **Details tab**:



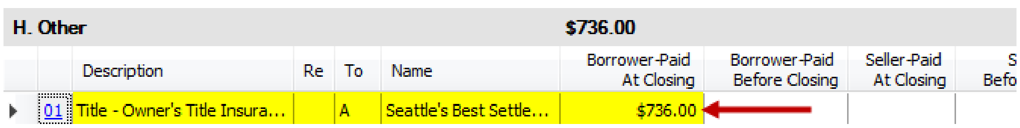
- **Payors Grid**: The **final loan premium** shows in the **Payors grid**:



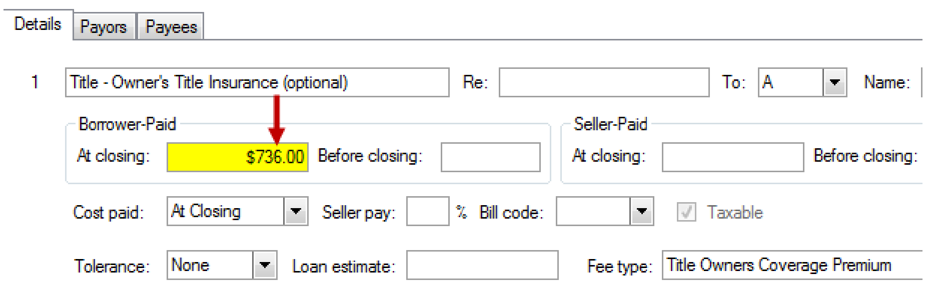
- **Payees Grid**: The **10% split** is detailed in the **Payees grid**:



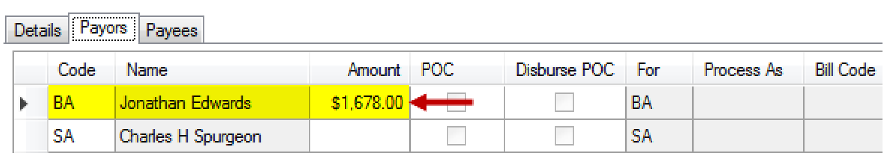
- **Section H. Other**: The **SI net owner's premium** displays on the CDF line:



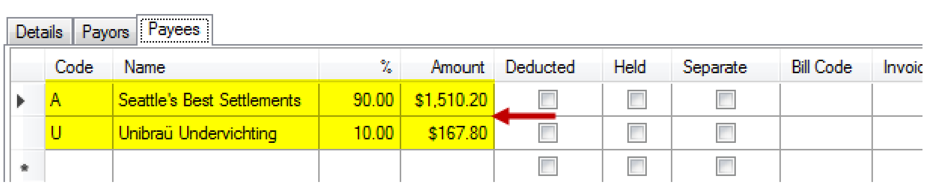
  - **Details Tab**: The **SI net owner's premium** also displays in the grid:



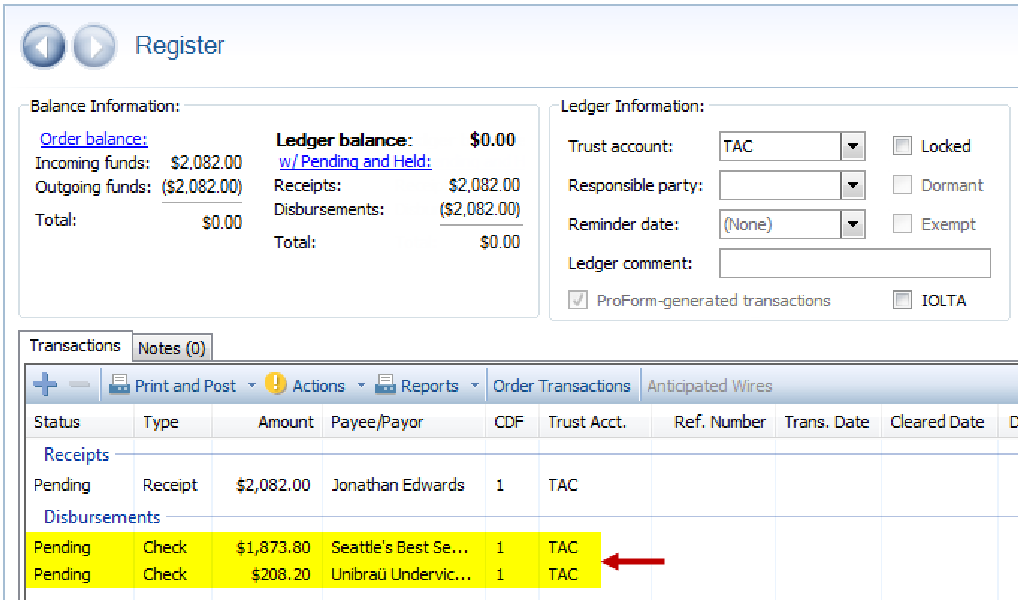
  - **Payors Grid**: The **Final owner's premium** shows in the **Payors grid**:



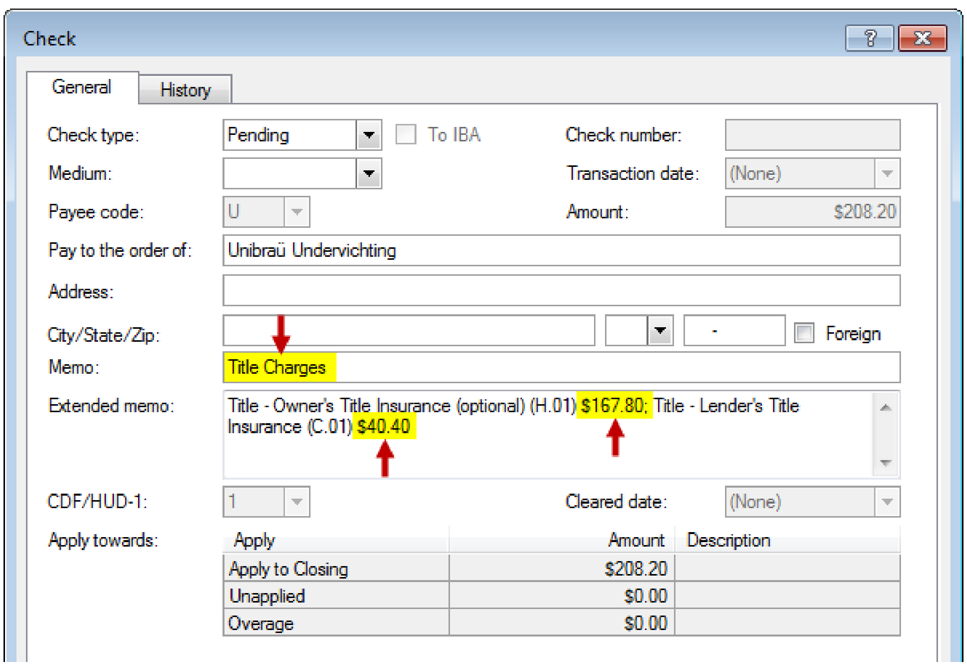
  - **Payees Grid**: the **10% split** is detailed in the **Payees grid**:



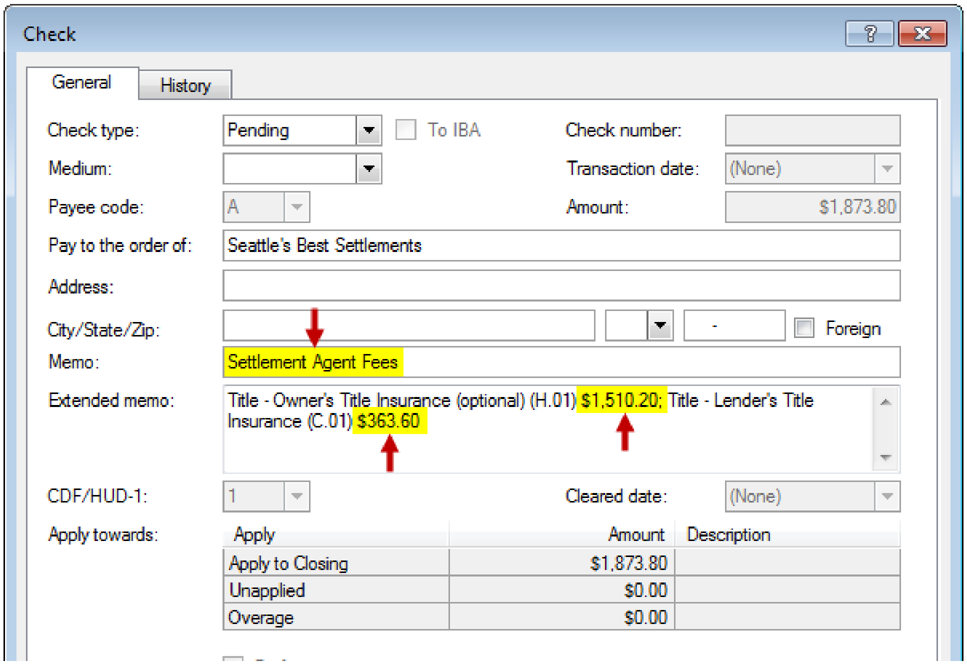
- **Register**: The two resulting checks to the Settlement Agent and Underwriter can be viewed under **Transactions > Disbursements**:



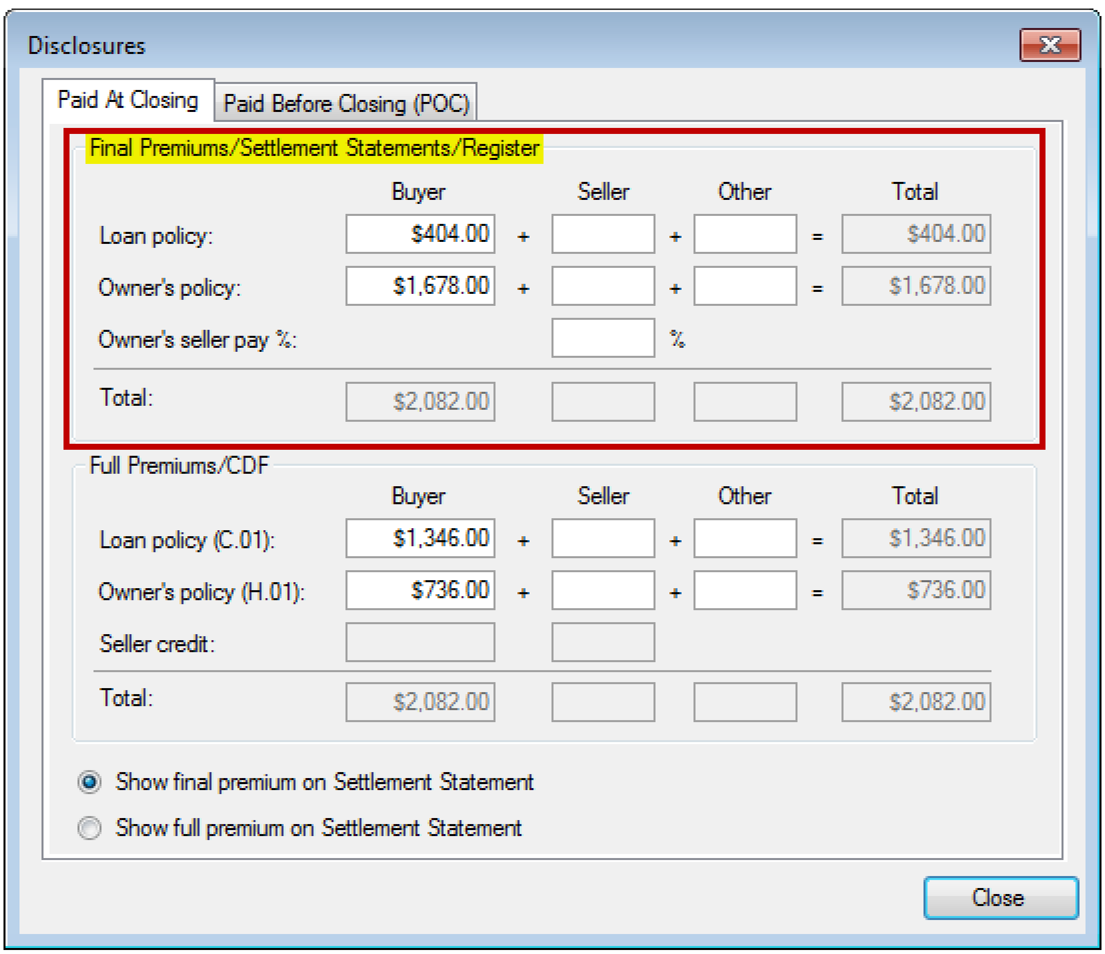
- **Underwriter disbursement details**: The 10% splits for the underwriter—$167.80 from the Owner's policy and $40.40 from the Loan policy—are detailed in the Extended memo section with corresponding section numbers



- **Settlement Agent disbursement details**: The 90% splits for the settlement agent—$1,510.20 from the Owner's policy and $363.60 from the Loan policy—are detailed in the Extended memo section with corresponding section numbers:



- **Disclosures Dialog**: The disclosures dialog reflects the following amounts for the above disbursements:



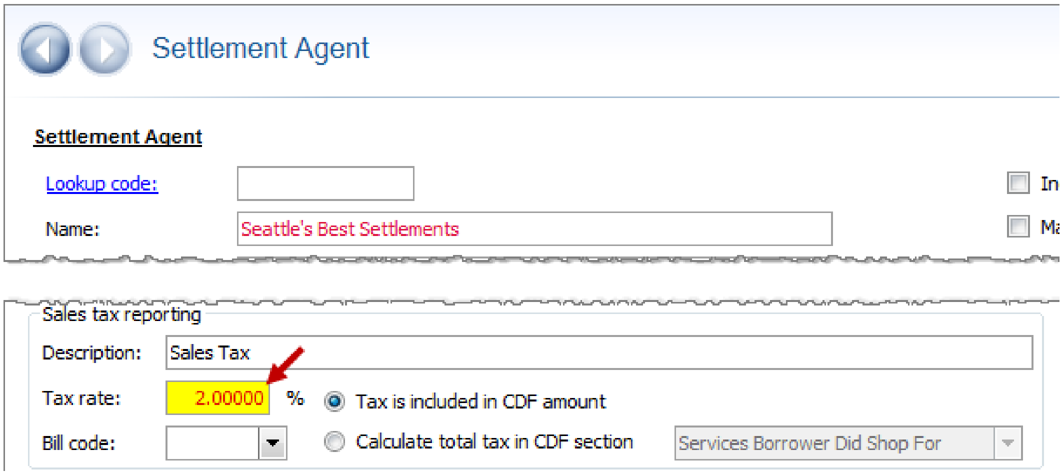
- **Settlement Statement**: The rendered master settlement statement here will reflect the final premium amounts:

Seller Debit	Seller Credit			Borrower Debit	Borrower Credit
		Escrow/Title Charges			
		Lender's Title Insurance to Seattle's Best Settlements Coverage: 125,000.00	404.00	404.00	
		Owner's Title Insurance to Seattle's Best Settlements Coverage: 150,000.00	1,678.00	1,678.00	
		Subtotals		2,082.00	
		Balance Due FROM Borrower			2,082.00
0.00	0.00	**TOTALS**		2,082.00	2,082.00

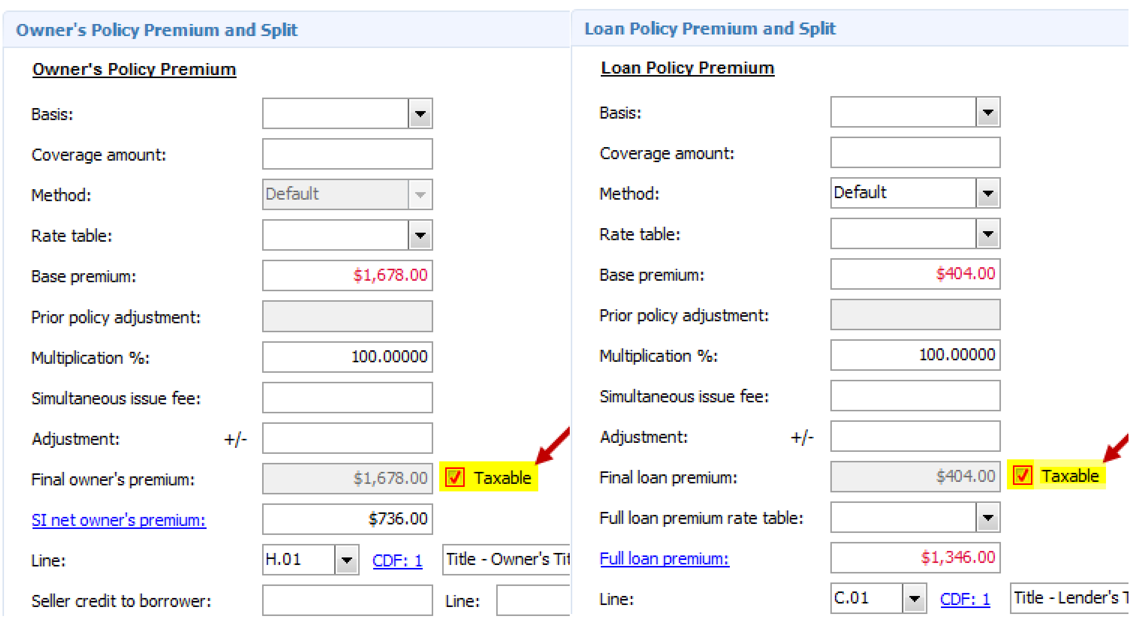
Sales Tax and Policies

In this example the basic title order example above is used, with a few minor changes:

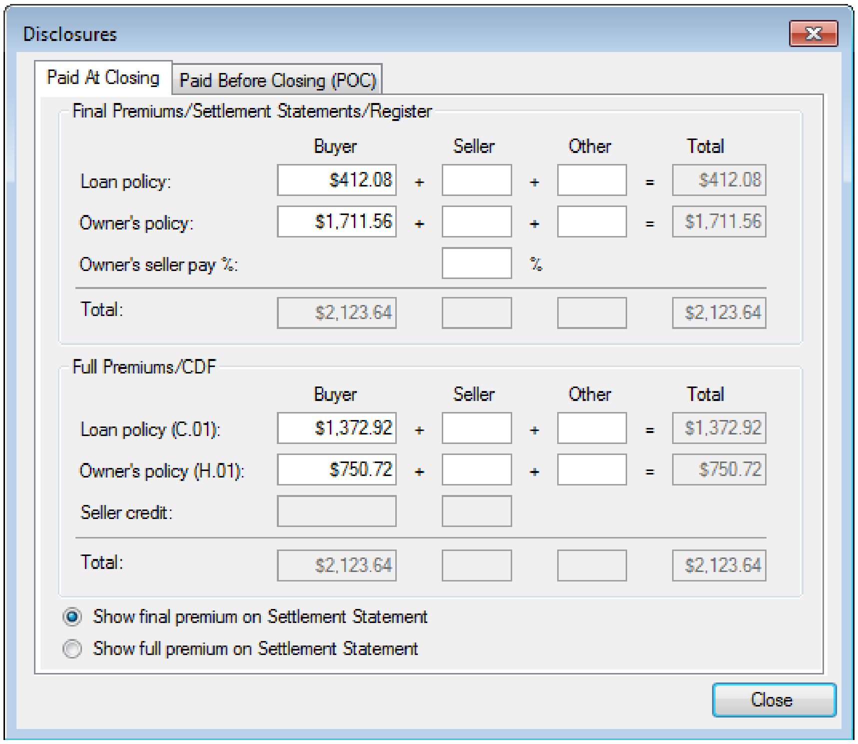
- Both the **Loan & Owners policies** are **taxable**.
- A **2% Tax rate** has been added to the settlement agent:



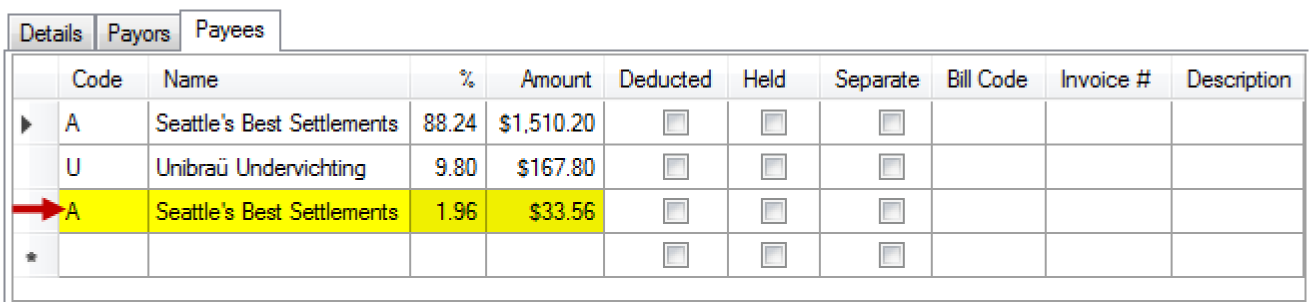
- The **Owner's** and **Loan Policy Premiums** have the **taxable** checkbox selected:



- The **Disclosures dialog** presents the following information, which includes tax amounts added to the premiums:

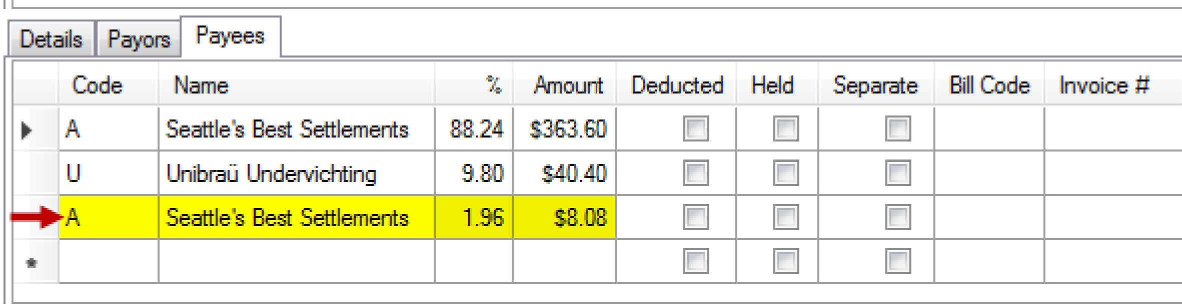


- The **Payee grids** automatically split out the tax amounts:



Details | Payors | Payees

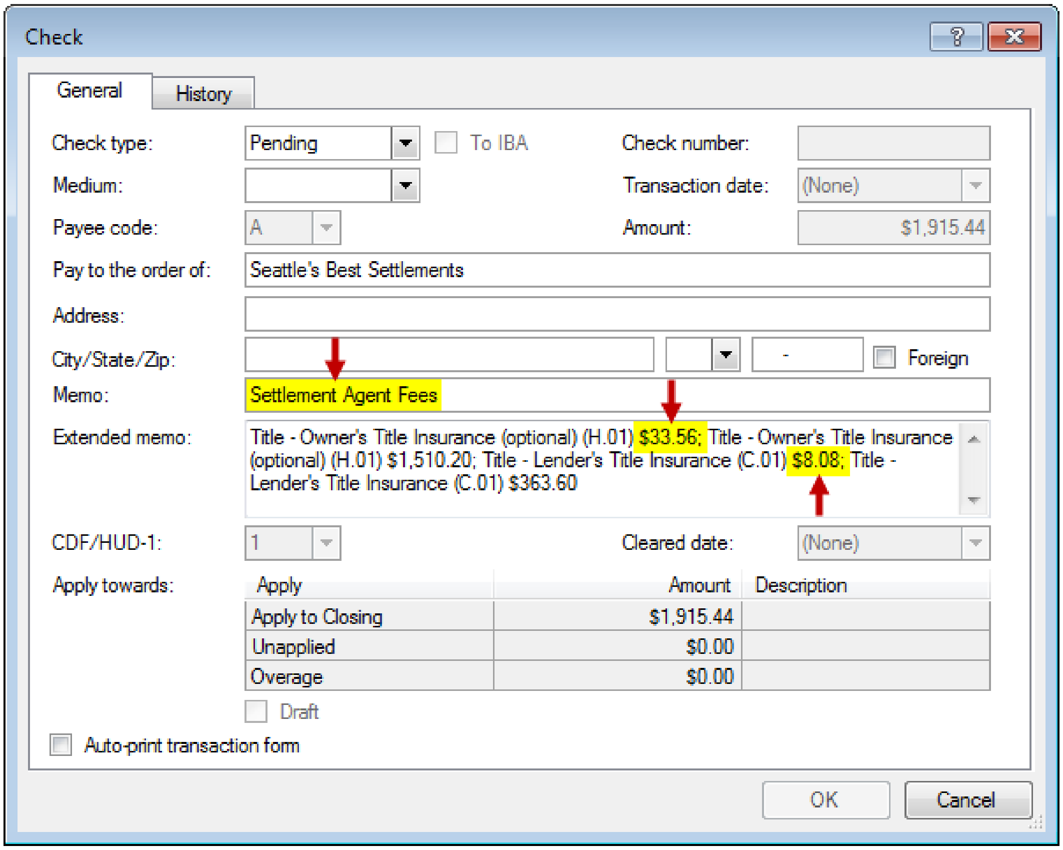
Code	Name	%	Amount	Deducted	Held	Separate	Bill Code	Invoice #	Description
A	Seattle's Best Settlements	88.24	$1,510.20						
U	Unibraü Undervichting	9.80	$167.80						
A	Seattle's Best Settlements	1.96	$33.56						



Details | Payors | Payees

Code	Name	%	Amount	Deducted	Held	Separate	Bill Code	Invoice #
A	Seattle's Best Settlements	88.24	$363.60					
U	Unibraü Undervichting	9.80	$40.40					
A	Seattle's Best Settlements	1.96	$8.08					

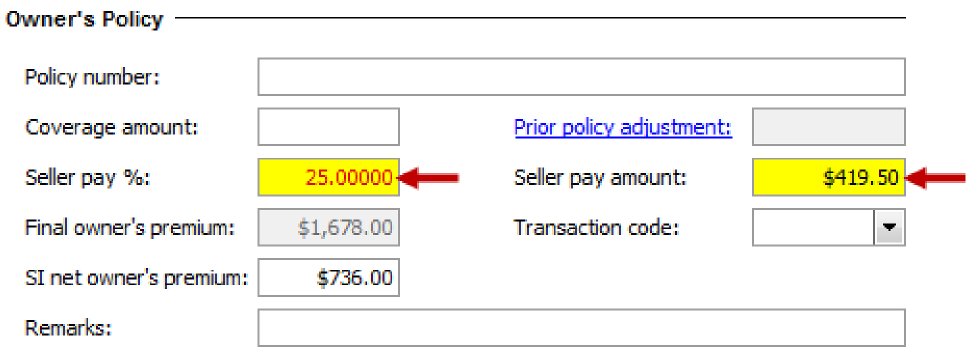
- **Settlement Agent disbursement details**: In addition to the 90% splits for the settlement agent—$1,510.20 from the Owner's policy and $363.60 from the Loan policy—**the tax amounts are also detailed** in the **Extended memo** section with corresponding section numbers:


Check
General
History
Check type:
Pending
To IBA
Check number:
Medium:
Transaction date:
(None)
Payee code:
A
Amount:
$1,915.44
Pay to the order of:
Seattle's Best Settlements
Address:
City/State/Zip:
-
Foreign
Memo:
Settlement Agent Fees
Extended memo:
Title - Owner's Title Insurance (optional) (H.01) $33.56; Title - Owner's Title Insurance (optional) (H.01) $1,510.20; Title - Lender's Title Insurance (C.01) $8.08; Title - Lender's Title Insurance (C.01) $363.60
CDF/HUD-1:
1
Cleared date:
(None)
Apply towards:
Apply
Amount
Description
Apply to Closing
$1,915.44
Unapplied
$0.00
Overage
$0.00
Draft
Auto-print transaction form
OK
Cancel

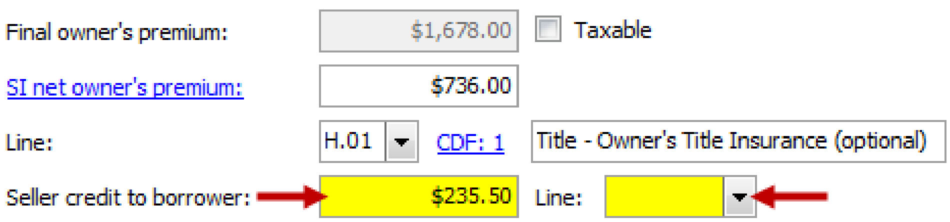
Seller Pay

In this example the basic title order example is used, with one minor change:

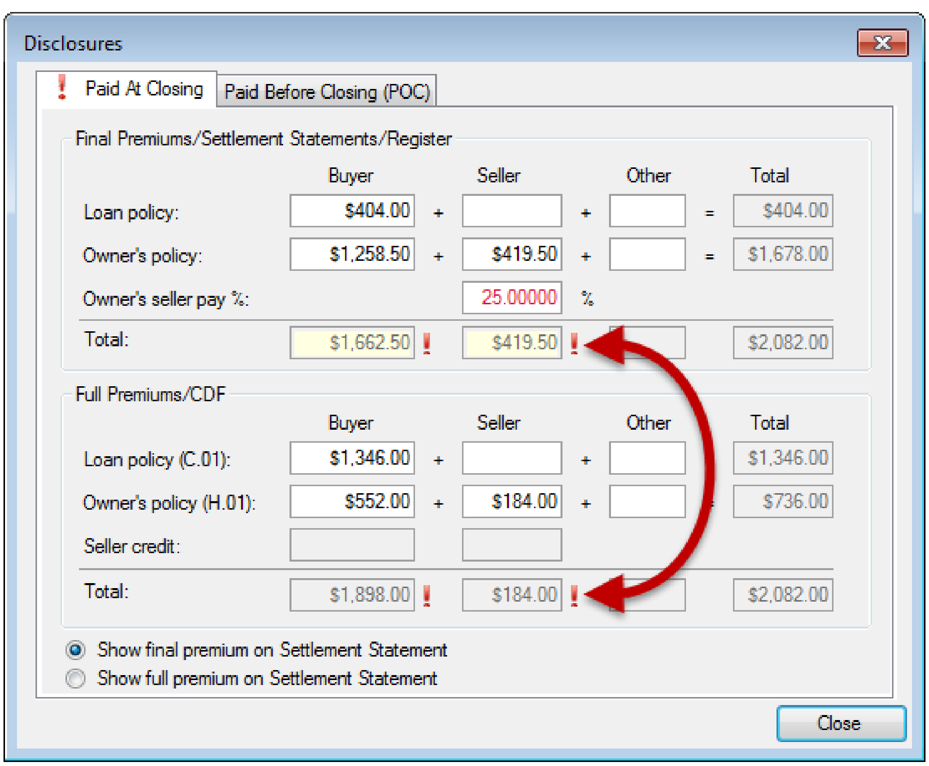
- The **Owner's policy is paid 25%** by the seller.



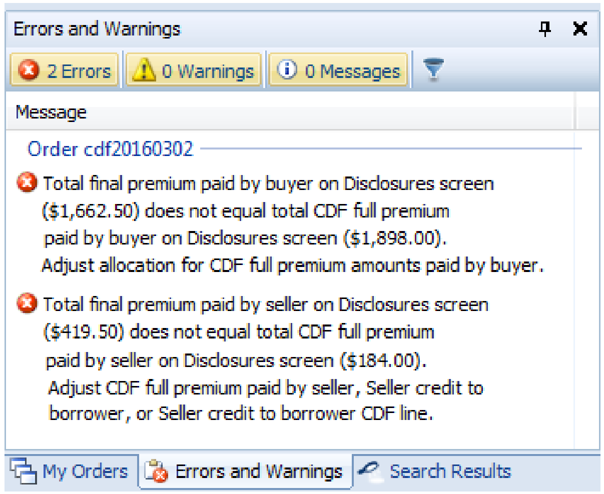
- A line is not selected for the **Seller credit to borrower**:



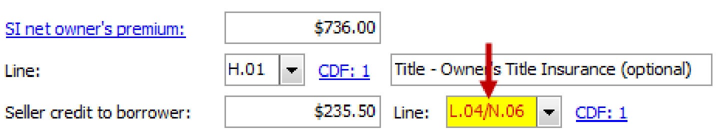
- This results in **validations (warnings)** appearing on the **Disclosures dialog** because the numbers are not in balance because a line has not been selected for the Seller credit to borrower:

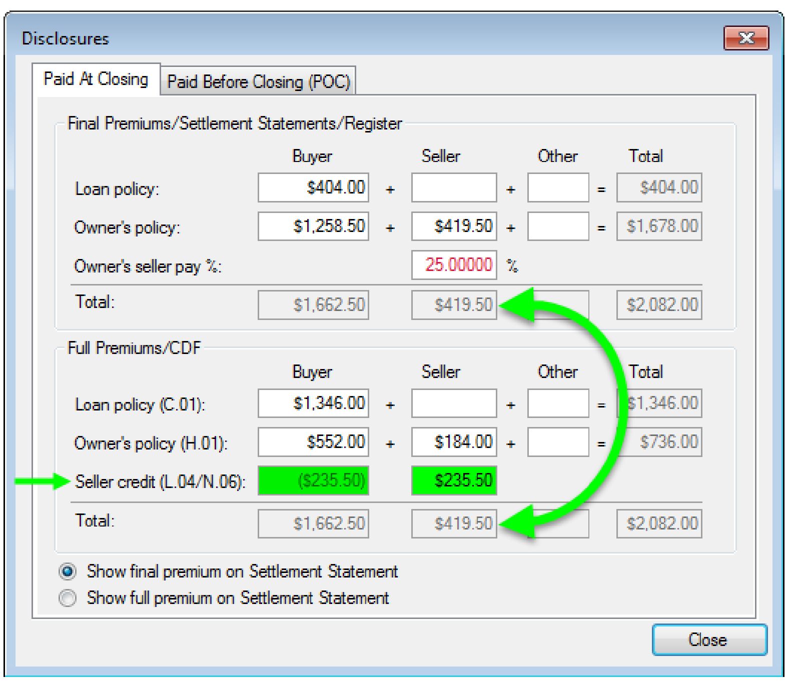


- When the fields do not validate correctly, e**xclamation points** will appear on the **tab** at top, as well as next to **fields that are not properly in balance**. Fields in question will also be **shaded yellow**.
- Errors are also presented in the Errors and Warnings panel:



- Once a CDF line is selected for the **Seller Credit to borrower**, the Disclosures dialog is brought into balance and the validation warnings are removed:



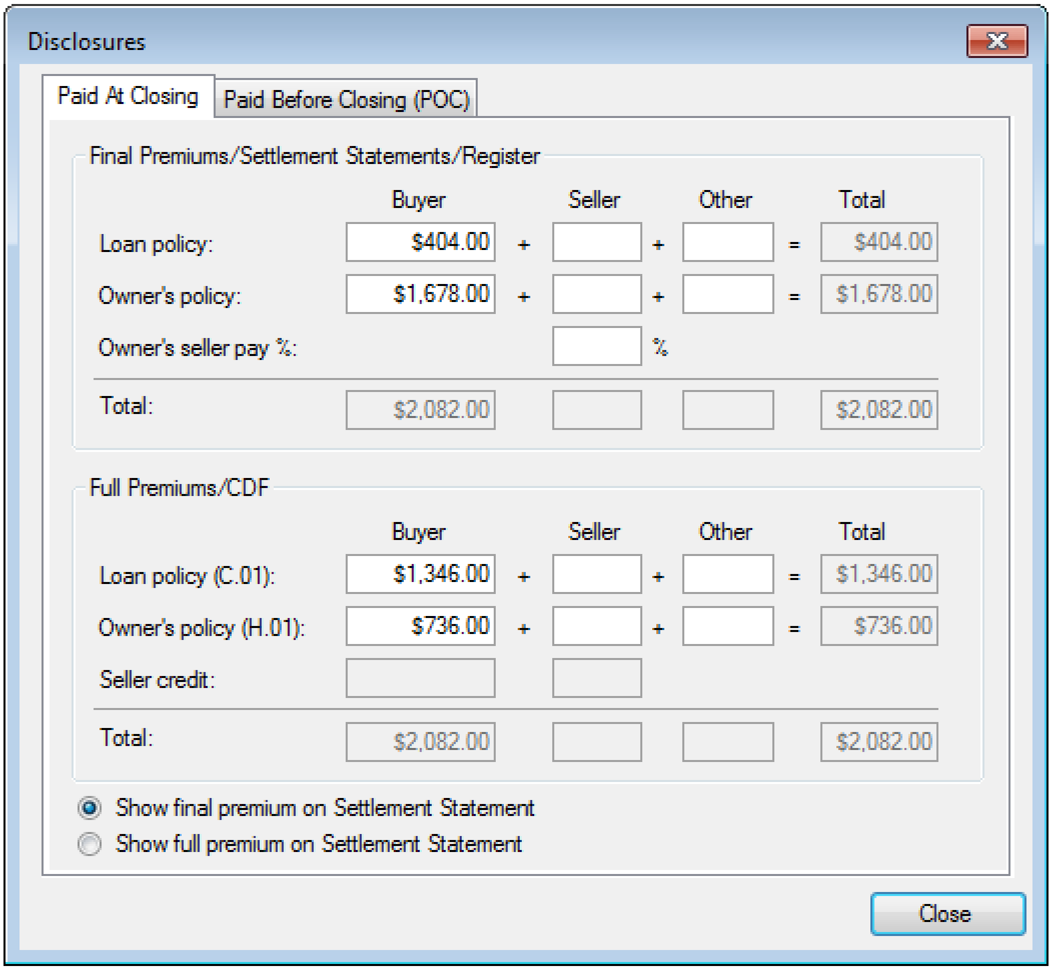


- **Note**: There are other ways to fix this particular issue if you do not want to use a CDF Page 3 credit. You could manually edit the CDF Amount Columns to apply the rest of the $419.50 that the seller is paying.

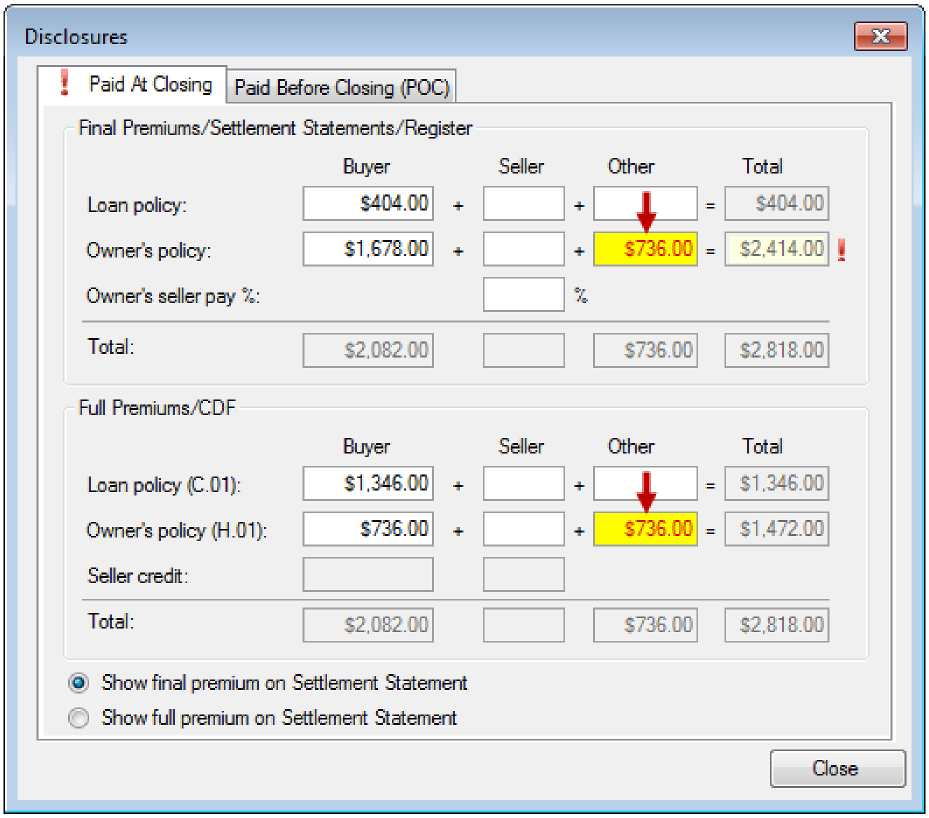
Paid By Others

In this example, the basic title order example is repeated; the only difference here is that a third party is paying for the Owner's Policy.

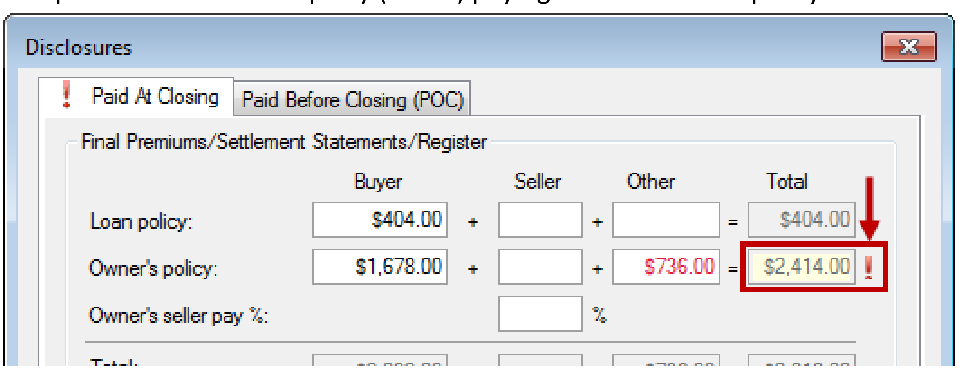
- Here is the basic title example; with all amounts balanced:



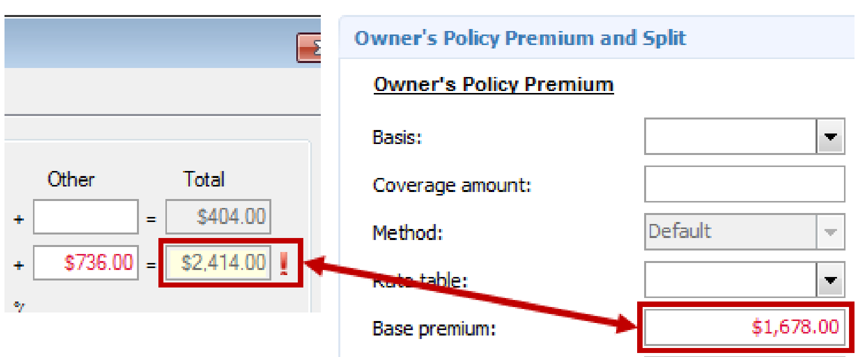
- Here, **$736** is entered in the **Other column** for the owner's policy fields:



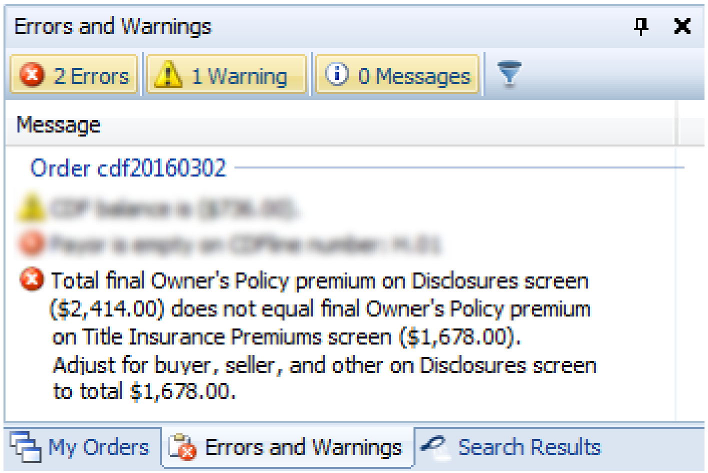
- This **validation warning** appears, indicating that an adjustment needs to be made to compensate for the third party (Other) paying for the Owner's policy:



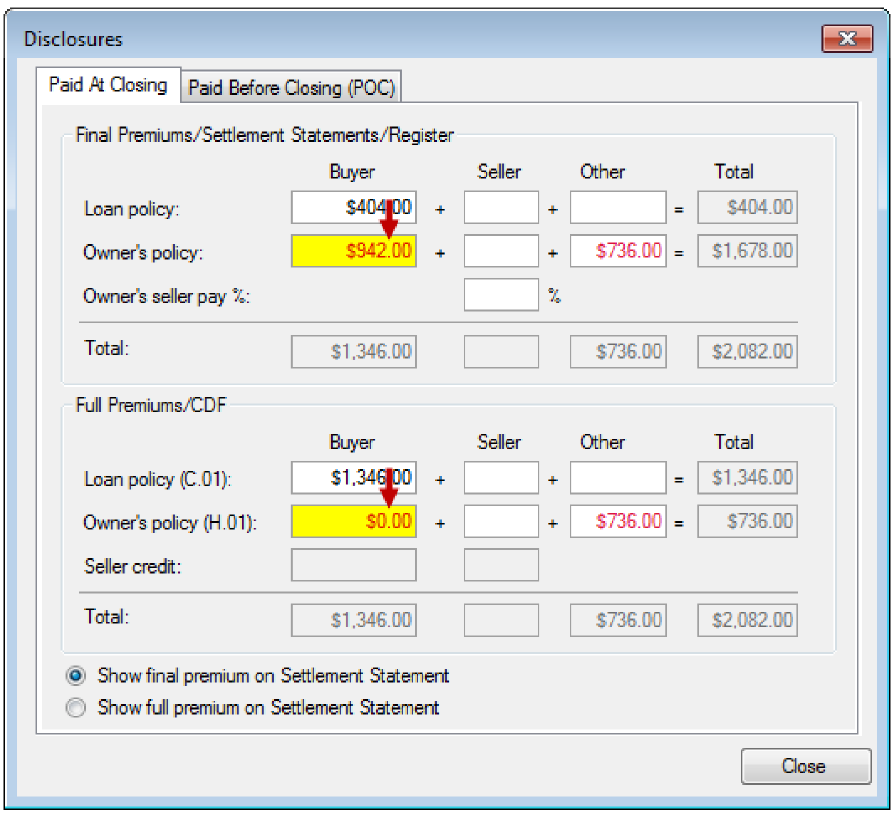
  - The total policy here is compared against the policy amount on TIPS



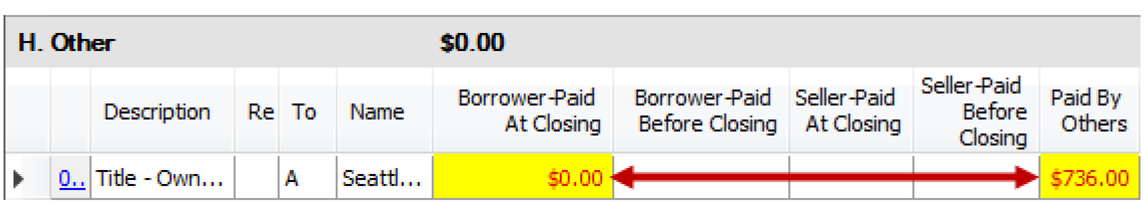
- This validation warning is also reflected in the Errors and Warnings panel:



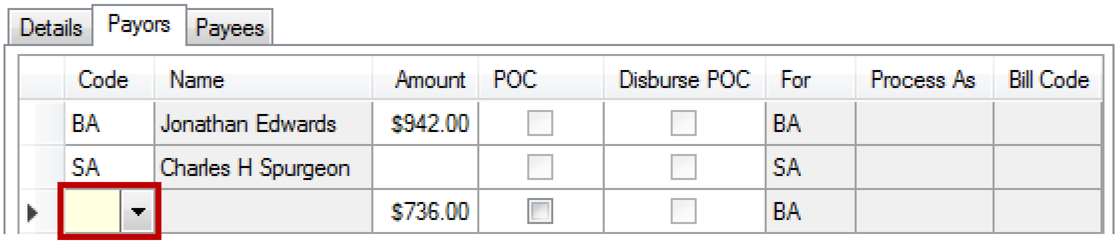
- The error can be resolved by reducing the Owner's policy amounts in the Buyer column by $736, thus reducing the amount the buyer is paying:

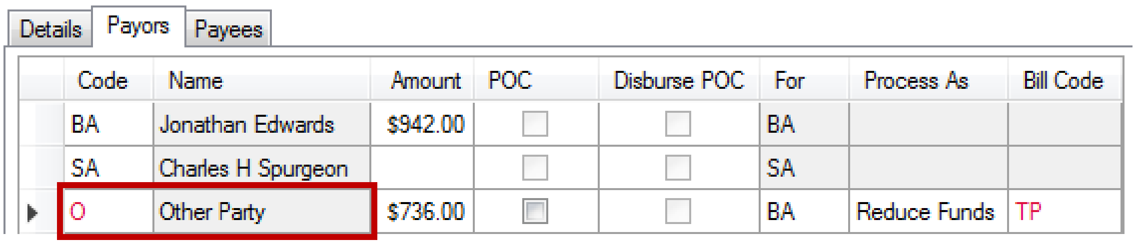


- This is how the Owner's Policy now appears on the CDF line:

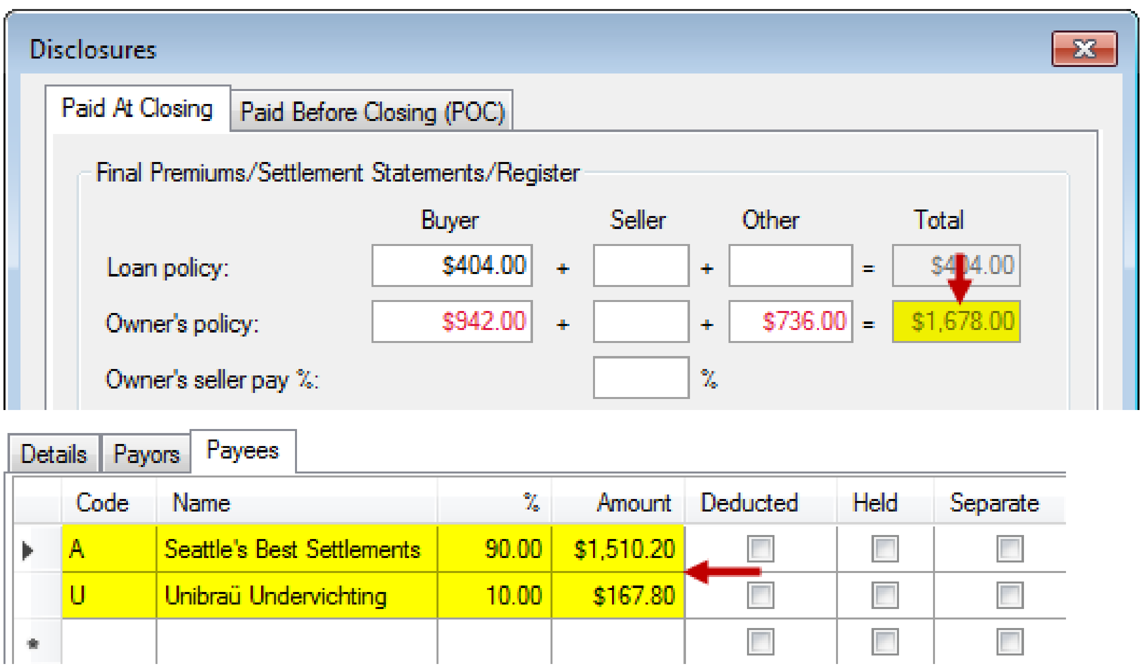


- On the Payors tab, enter the applicable code for the party paying for the Owner's Policy:





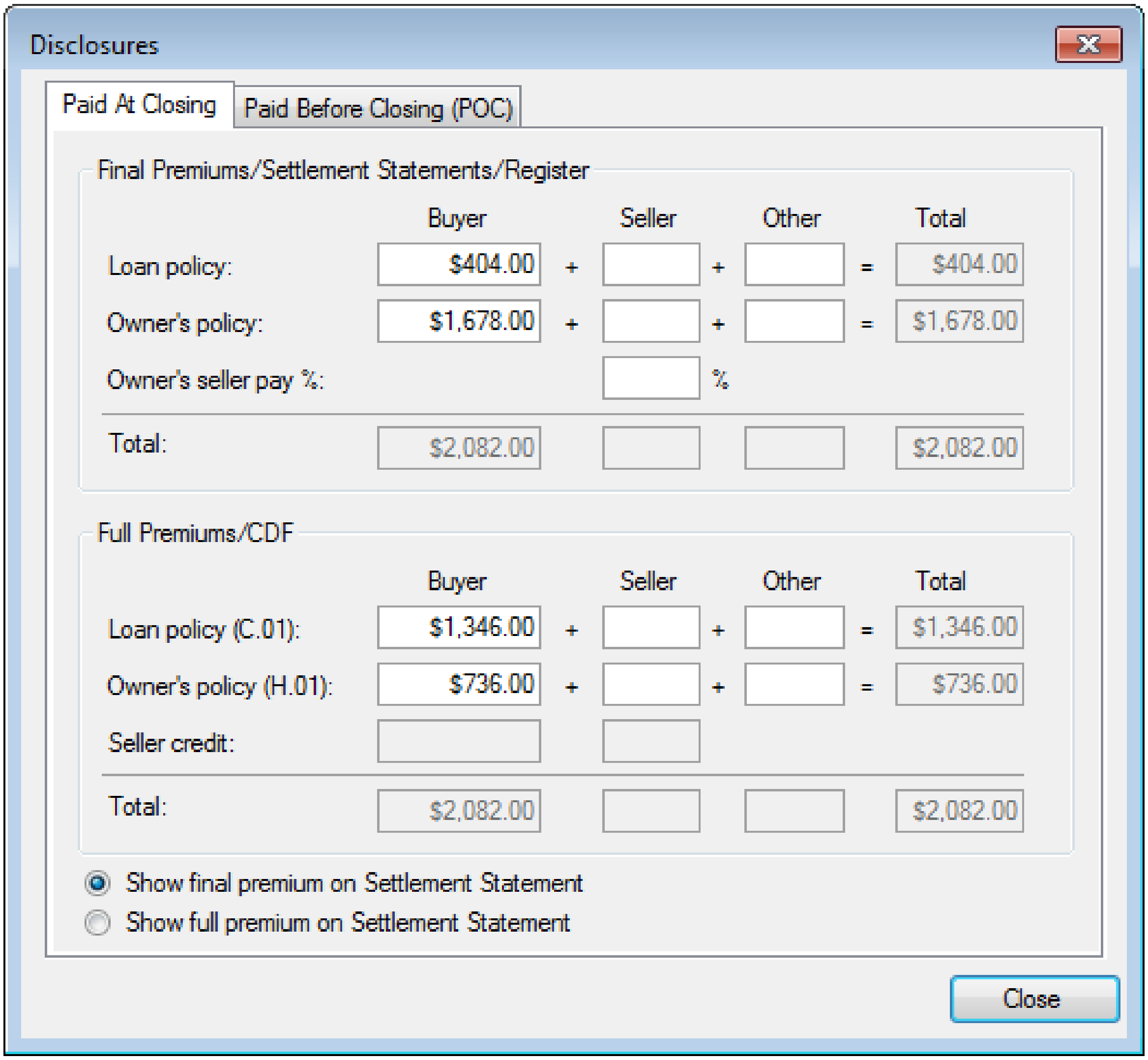
- The entire Final Owner's policy premium amount is always reflected on the Payee tab:



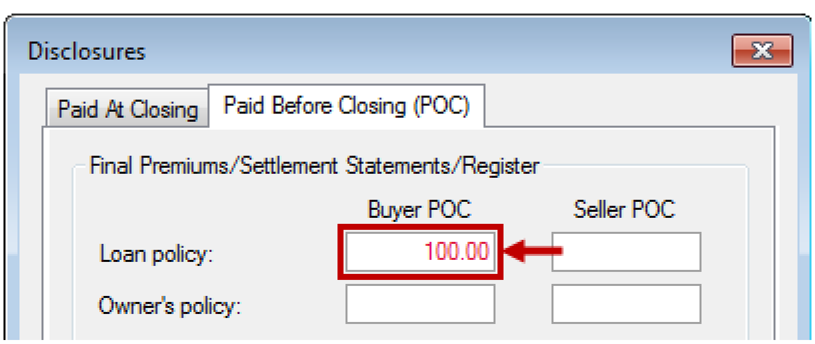
Paid Outside of Closing

In this example, the basic title order example above is repeated, with the only difference being that the buyer has put money toward the Loan policy outside of closing and no tax was applied.

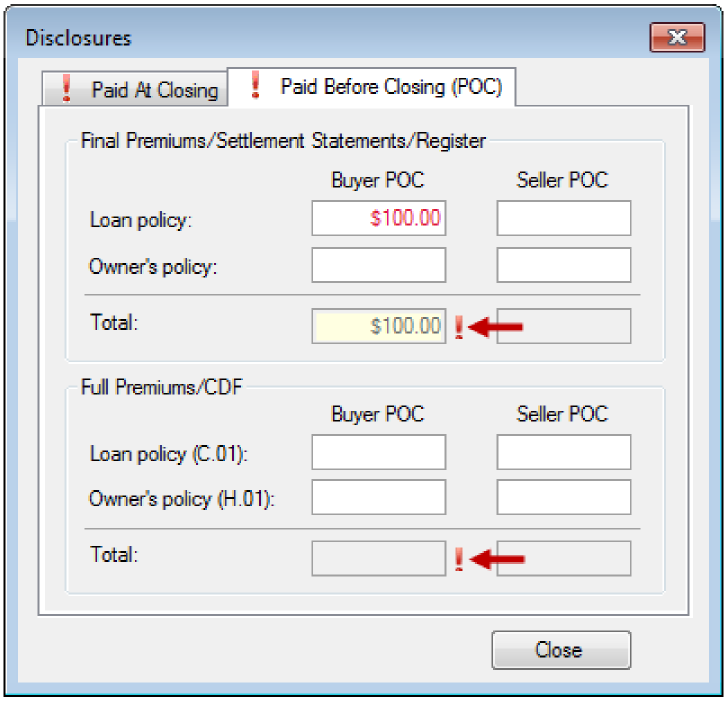
- Here's the basic title example; with all amounts balanced:



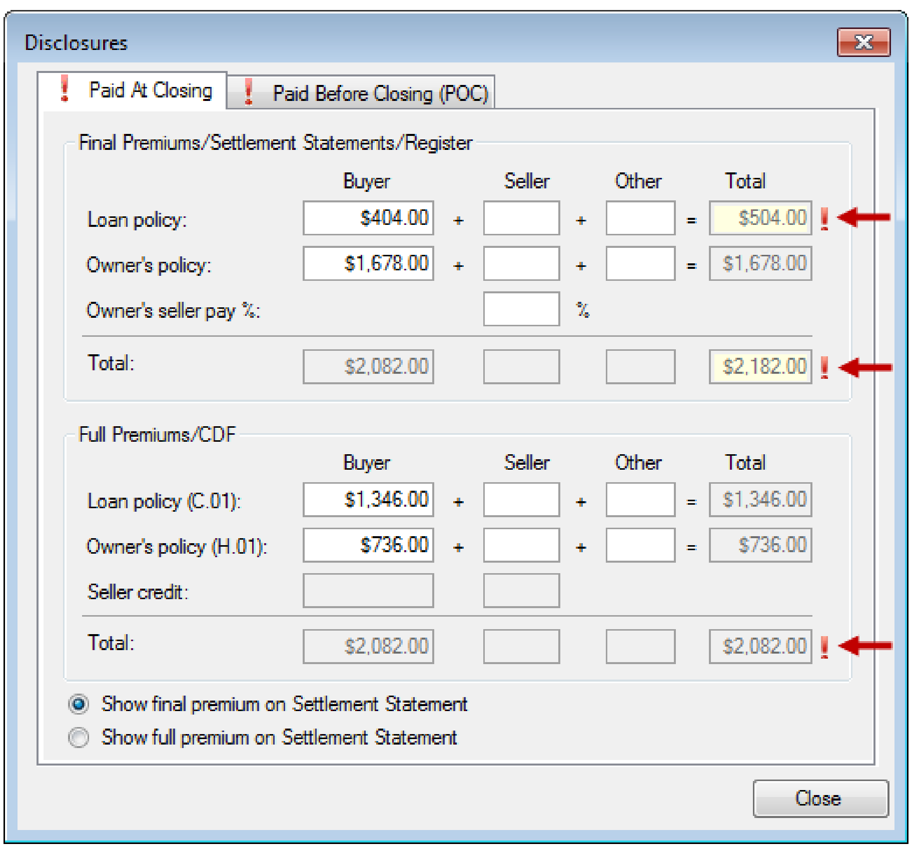
- **$100** is input towards the Loan Policy Buyer POC field on the **Paid Before Closing (POC)** tab:



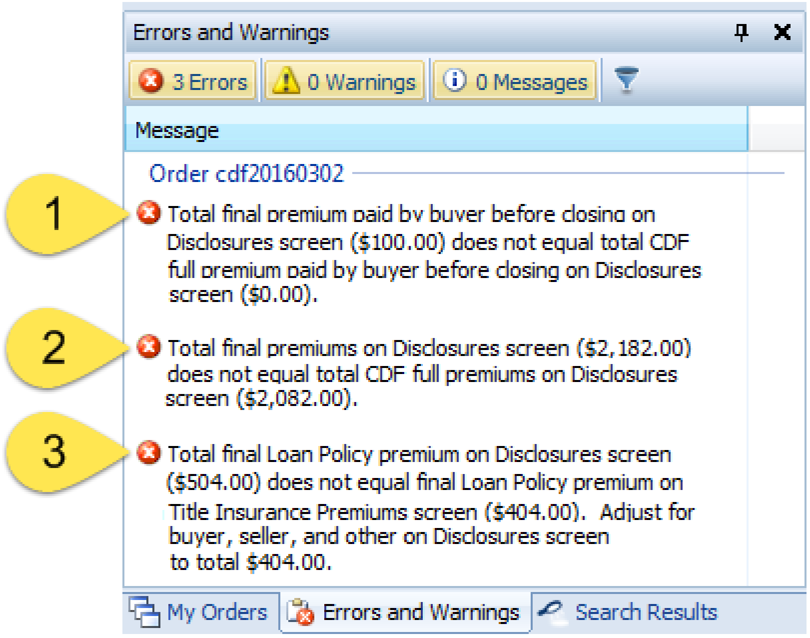
- As a result, several warnings appear:
  - **Paid Before Closing (POC)** tab warnings:



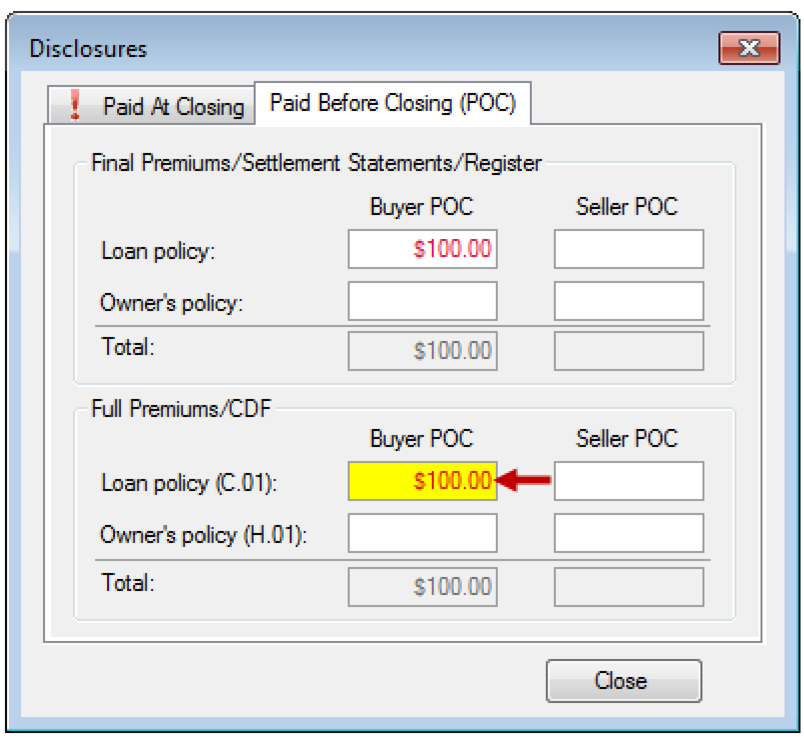
  - **Paid at Closing** tab warnings:



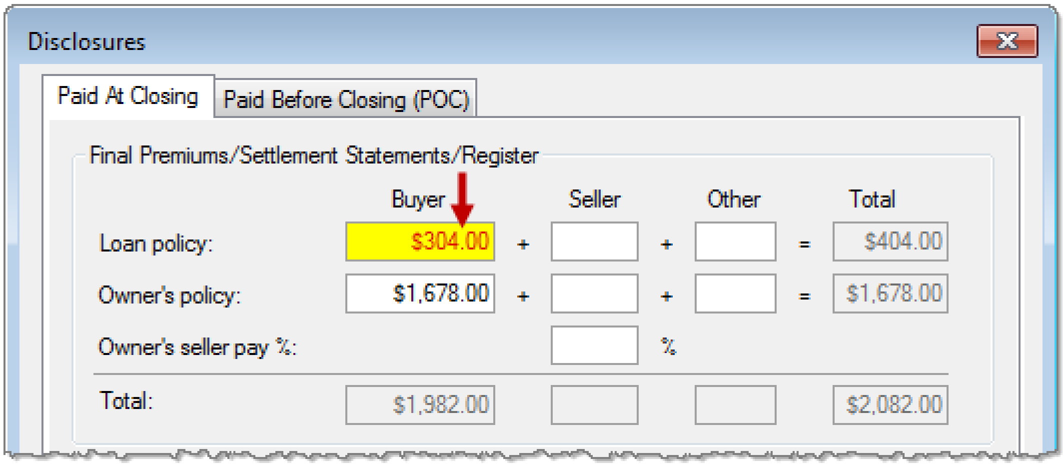
- **Errors and Warnings** panel: You may double-click these items; the corresponding tab on the Disclosures dialog will open for corrections:



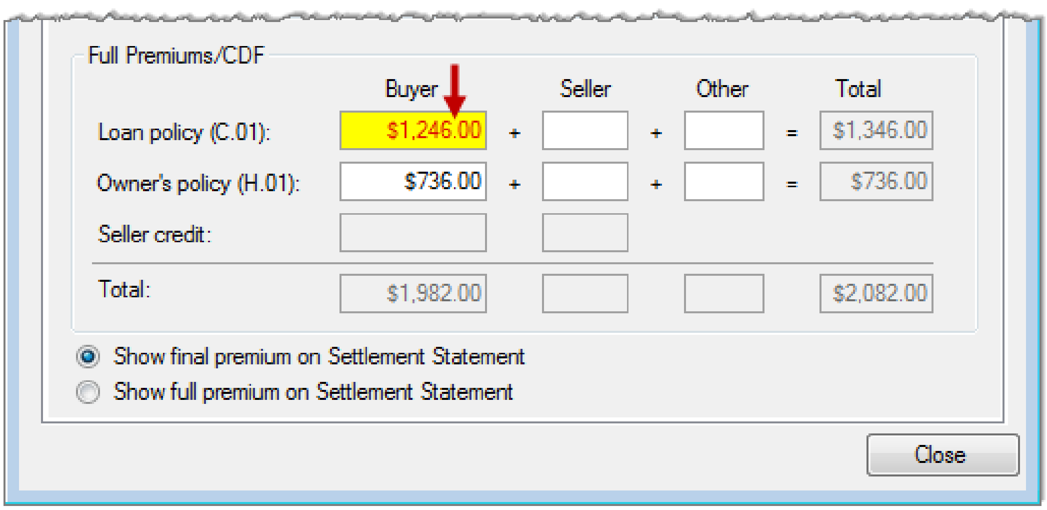
- **Explanations of these three warnings**, as well as their resolutions, are as follows:
  1) The **$100** for the **Final Loan policy premium** entered as a POC does not equal the **Full Loan policy premium POC**.
     a. **$100** needs to be added to the **Full Premium Loan policy because you must balance the final premium with the full premium**:



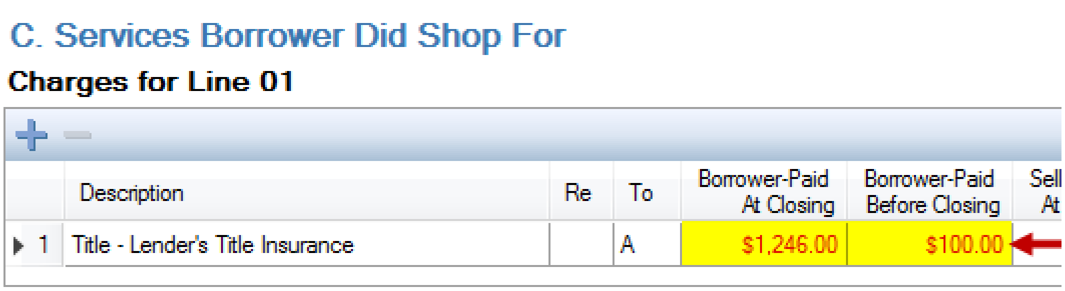
2) The **total of the Final premiums** on the **Paid at Closing** tab does not match the total **CDF full premiums**.
   a. Part of this error is resolved with bullet #3 below. However, you must **reduce the Final premium Loan policy** by **$100**:



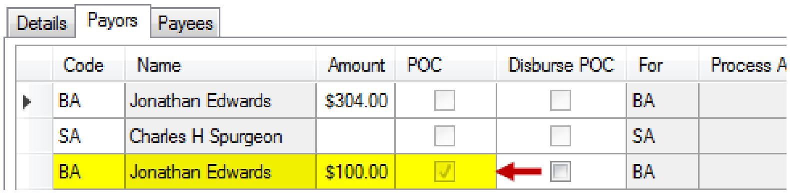
3) The **Final Loan policy premium** on the **Paid at Closing** tab doesn't equal the **final loan policy** on the Title Insurance Premiums screen.
   a. Reduce the **Loan policy full premium** by **$100** so that the total of the **loan policy premium** will now match the Title Insurance Premiums screen.



- The **CDF Grid will display these amounts** in the two columns shown here:



- The **Payors grid** for the Loan Policy Premium appear as follows:



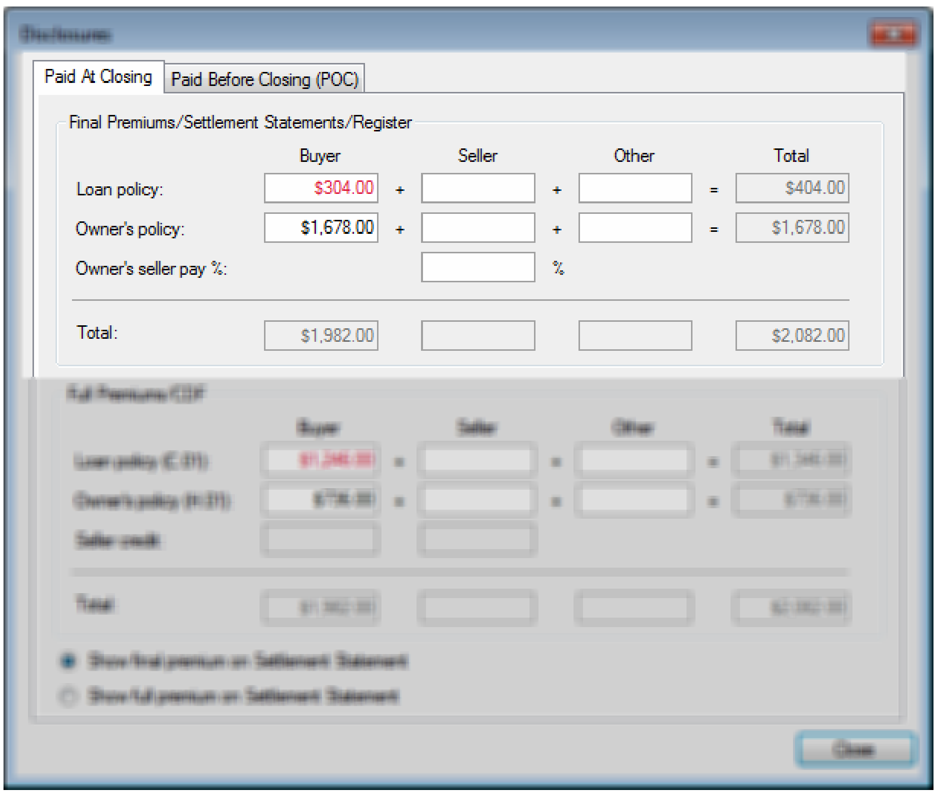
Settlement Statements

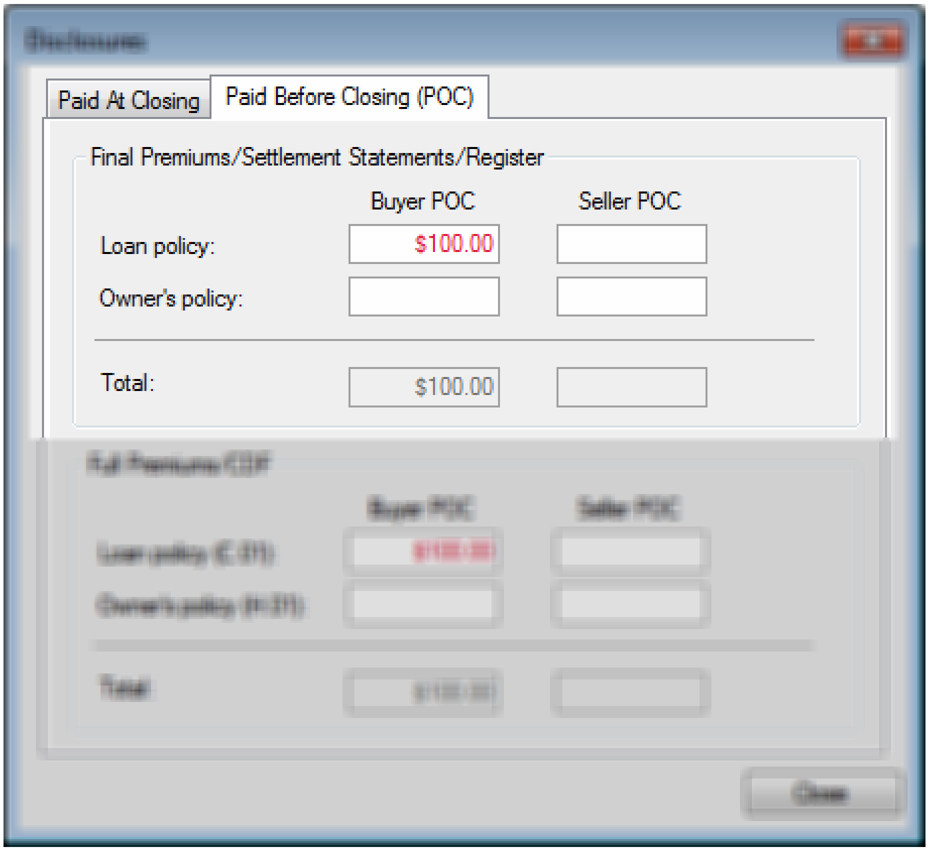
The CDF Settlement Statements were updated show the **Final Premiums** instead of the **Full Premiums** inside the debit columns rather than as a note inside the description column. Individual Settlement Statements for orders created with v4.1 or higher will always disclose the final premium amounts in the center details column since these documents utilize the payor amounts to determine transactions. *300131*

See the Paid Outside of Closing (POC) Example above to review the numbers given below.

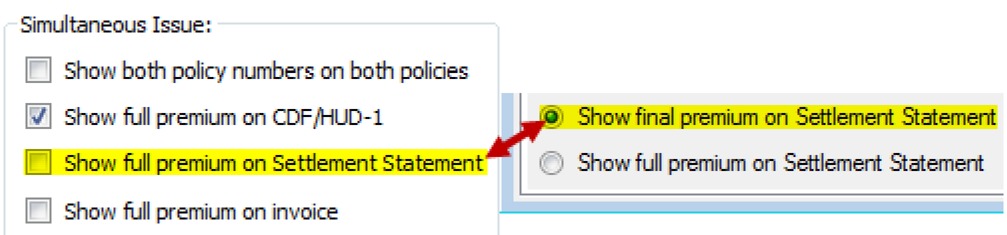
Example One

- If the **Show final premium on Settlement Statement** radio button is selected on the Disclosures dialog (the **Show full premium on Settlement Statement** checkbox on TIPS will be **unchecked**), the Settlement Statements will show the **Final Premium fields** in the **Seller and Borrower columns**, as well as in the **center details column**.
    - **Disclosure Dialog** (**Paid at Closing Tab** & **Paid Before Closing Tab**): Note carefully the data reflected in the **top half** of the dialog:





- **TIP screen checkbox/Disclosure Dialog options**: Note that these two radio buttons are the same as the checkboxes on the Title Insurance Premium Screen; changing this option in TIP will change the Disclosure dialog, and vice versa:



- **Rendered Master Settlement Statement:**

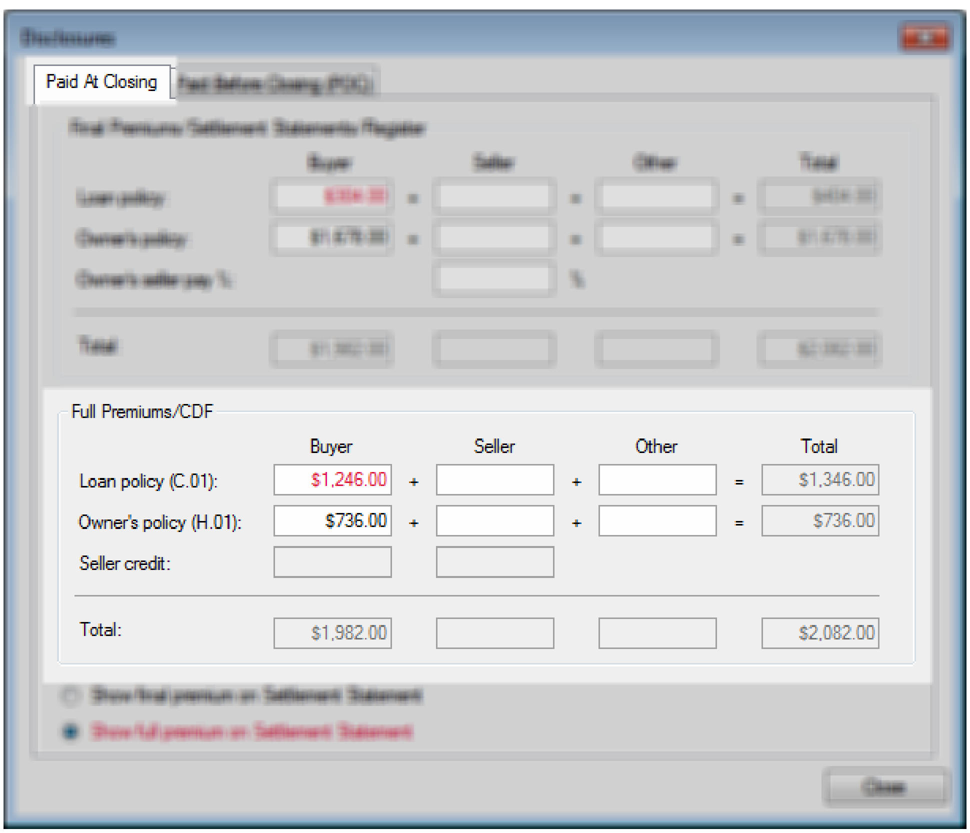
Seller Debit	Seller Credit		Borrower Debit	Borrower Credit
		Escrow/Title Charges		
		Lender's Title Insurance to Seattle's Best Settlements $100.00 paid outside closing by Borrower Coverage: 125,000.00 404.00	304.00	
		Owner's Title Insurance to Seattle's Best Settlements Coverage: 150,000.00 1,678.00	1,678.00	
		Subtotals	1,982.00	
		Balance Due FROM Borrower		1,982.00
0.00	0.00	**TOTALS**	1,982.00	1,982.00

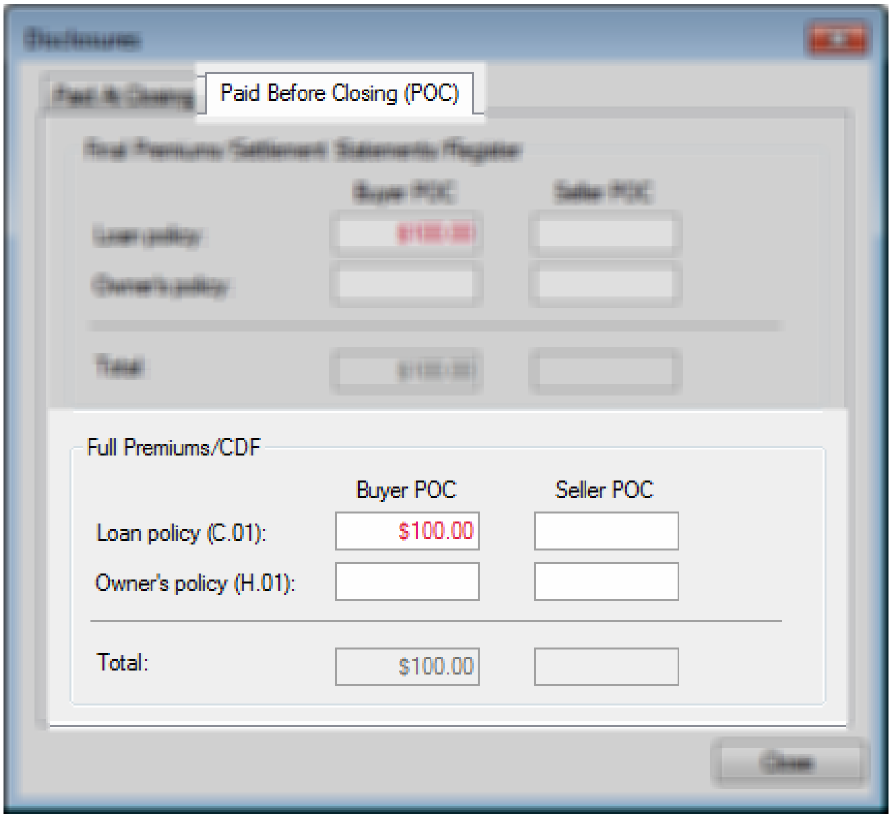
- The total final premium paid by all parties shows in the details.
- The final premiums show in the Credit/Debit columns.
- The borrower is paying **$100.00** of the Owner's premium outside of closing.
- The **$404.00** in the details column represents the Loan Policy's **Final Premium Total** before the Paid Outside Closing (POC) amount have been applied.

- **Note:** If the **Show final premium on settlement statement** radio button is selected, the **Seller credit** amount will **not** print on the Settlement statements.
  - When the final premiums are shown, there is no need for the seller credit to show; this is only needed when the full premiums show on the settlement statements.

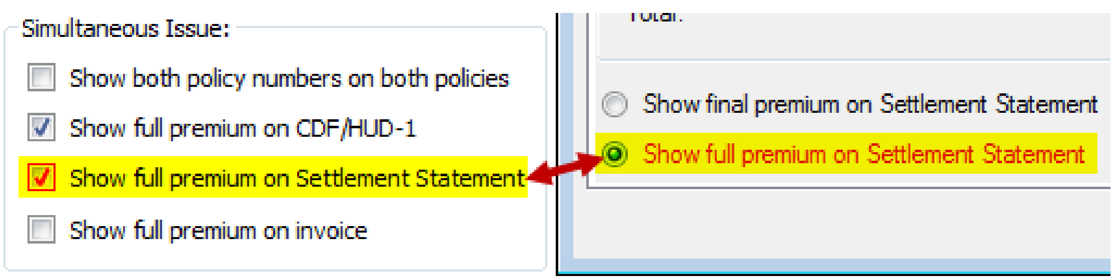
Example Two

- If the **Show full premium on Settlement Statement** radio button is selected on the Disclosures dialog AND the **Show full premium on Settlement Statement** checkbox on TIPS is **checked**, the Settlement Statements will show the **Full Premium fields** in the **Seller and Borrower columns**, as well as in the **central details column**.
  - Note that these two radio buttons are the same as the checkboxes on the Title Insurance Premium Screen; changing this option in TIP will change the Disclosure dialog, and vice versa.
  - **Disclosure Dialog (Paid at Closing Tab & Paid Before Closing Tab)**: Note carefully the data reflected the **bottom half** of the dialog:





- **TIP screen checkbox/Disclosure Dialog options**: Note that these two radio buttons are the same as the checkboxes on the Title Insurance Premium Screen; changing this option in TIP will change the Disclosure dialog, and vice versa.



- **Rendered Master Settlement Statement**:

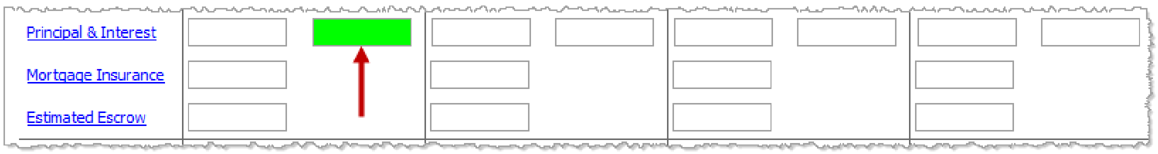
Seller			Borrower	
Debit	Credit		Debit	Credit
		Escrow/Title Charges		
		Lender's Title Insurance to Seattle's Best Settlements $100.00 paid outside closing by Borrower Coverage: 125,000.00 1,346.00	1,246.00	
		Owner's Title Insurance to Seattle's Best Settlements Coverage: 150,000.00 736.00	736.00	
		Subtotals	1,982.00	
		Balance Due FROM Borrower		1,982.00
0.00	0.00	**TOTALS**	1,982.00	1,982.00

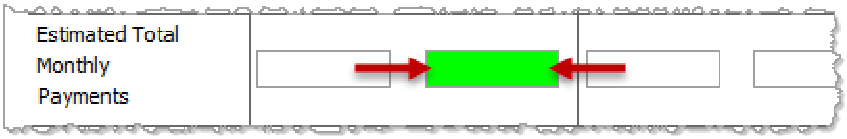
- The full premiums show in the Credit/Debit columns.
- The borrower is paying **$100** of the Owner's premium outside of closing.
- The **$1,346,00** represents the Owner's Policy **Full Premium Total** before the Paid Outside Closing (POC) amount has been applied.

CDF

Page1

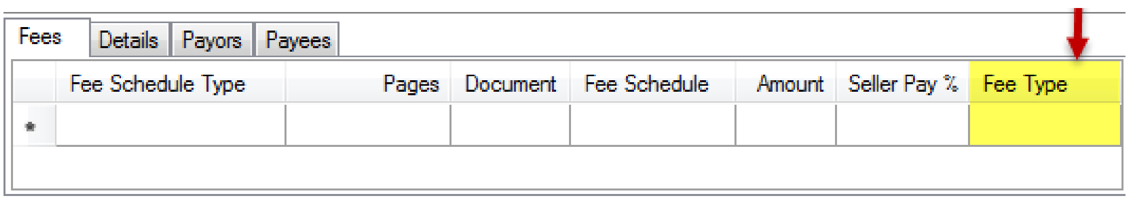
- The first column of the **Projected Payments** section now displays fields in which the user can enter **both Minimum and Maximum payments.** *306867*





Page 2

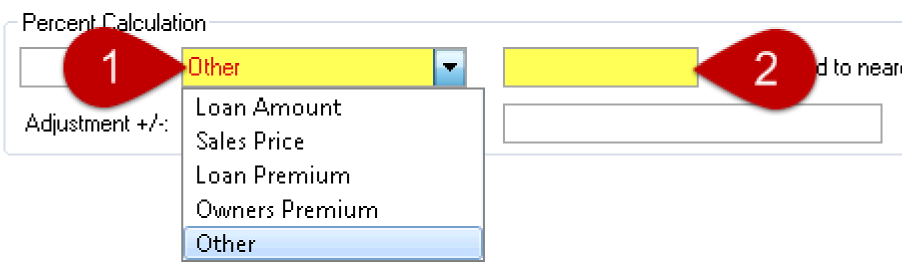
- A **Fee Type** column has been added to the **Fees tab in Section E**. This was added for use in lender integrations and MISMO XML export. *281174*



- The **seller pay %** has been enabled for all charge types—excluding prorations—whenever the amount is blank or not user-entered. *287320*

Percent Charges

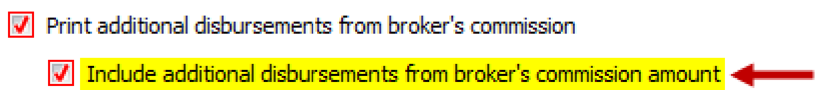
- An **Other amount field** (item **2** below) has been added to percent charges. This will allow the user to calculate a CDF line charge—such as commissions—off of any amount: *306863*



  - When the **Other** option (**1**) is selected, the **Other Amount field** (**2**) will become active so that a manual entry may be added.

Options

- An **Include additional disbursements from broker's commission** amount checkbox has been added; checking this will print the amounts on the CDF Attachment and Settlement Statements. This checkbox is available when the Print additional disbursements from broker's commission checkbox is selected**.** *307286*



- **Use Individual Settlement Statement rules to calculate buyer/seller receipts and disbursements**: The Individual Buyer and Seller Statements will always print the final premiums regardless of whether or not the "Show final" or "Show full" premium radio button option is checked on the title premium Disclosures dialog.

ProTrust

- The **Book Balance Report (Transaction Date)** was incorrectly including a line item for ledgers containing voided transfer(s) posted in the prior month, but no other transactions posted in the current month of the report range. *312387, 307997*
- Changing the transaction date of a disbursed transferred fund transaction was removing it from the **Disbursed Transferred Funds report by Trust Accounting Date**. *278664*
- Changing the transaction date of a disbursed transferred fund transaction was removing it from the **Disbursed Transferred Funds report by Transaction Date**. *234440*

API/SDK

- The Select SDK now requires **Visual Studio 2015**; it will no longer support Visual Studio 2010.
- **Documents & reports** may now be rendered **through the API**. *73150*

Installation

- **Prior to installation**, the .NET 4.6.1 framework files must be present on the local system. These files are included as a part of the client and server installation processes. When connecting an older version (pre-4.1) of the client to an upgraded version (4.1+) of the server, the .NET framework files will not automatically be downloaded for the client installation, so a manual installation of either the client or the .NET framework may be required. *315849, 315865*

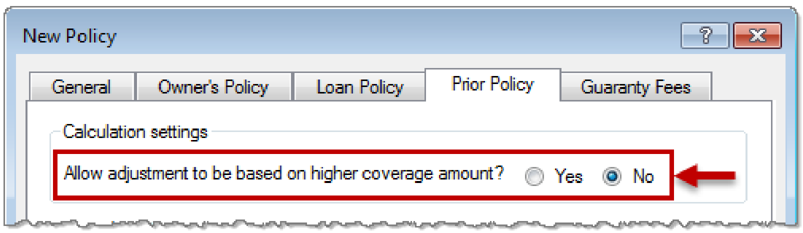
(4.1.1) 5/21/2016

SPAdmin

Managers

Policy

- The policy reissue rate will now only apply up to the face amount of the new policy. 20980
  - This new **Calculation setting** option on the Prior Policy tab allows the user to override this setting:



ProForm

Order

Documents

- The document selection dialog now lists items in alphabetical order. 321243
- Invoice footers were including the user name & domain; only the user name was needed. 321896
- After moving documents from Available ReadyDocs to Selected ReadyDocs, the selected item wasn't highlighted. This occurred when Windows themes were turned off. 321779

Reports

- In certain situations, when rendering reports, checkboxes on the prompt dialogs were incorrectly defaulting to being checked. 322851
- Select was shutting down when users attempted to stop a rendering report by clicking the **X** on the report tab. 323896
- In a specific scenario, custom report parameters weren't displaying values. Errors were arising when the application attempted to parse interactions with stored procedures containing no parameters. 325300

Technical

- The Document Publishing API was disposing of active streams before post-processing print pipeline handlers could execute.
  - An example of this scenario is demonstrated in the Select SDK in the How-To/Print Pipeline/Add a Print Job Handler help. Select now returns valid stream objects for items in the `printJob.OriginalItems` collection. 327297
- An archiving fix made to SPAdmin in v4.0.5.3 has been added to this release. 321926

    - This fix was as follows:
        - Documents could be corrupted when attempting to save while the archive process was running. *284106*
- Upgrades from 4.0.5.3 are now supported. *321927*

Pro1099

Records

- Profiles associated with 1099 records weren't properly set to their orders' owning profiles. *311884*

(4.1.2) 6/1/2016

ProForm

Order

Register

- Users are now able to send funds to a line from the register when the **Use optional Closing Disclosure forms for transactions not involving seller** option is checked. *298591*

Documents

- Select was crashing if users **closed the documents tab** before it completely loaded. *329575*

SPAdmin

Custom Fields

- The maximum length of a custom field's ConditionCode formula has been increased from 1024 to 2048 characters. *287118*

(4.1.3) 6/6/2016

Technical

Server

- The Select server service (spssvc.exe) was running in 32-bit mode instead of 64-bit mode. *330547*

(4.1.4) 6/21/2016

Reports

- Certain reporting dates were one day off of the date range entered by the user. *331442*

Technical

Upgrades

- Select upgrades were failing when the ALTA document bundle installed in the database was a newer version than the version to which Select was being upgraded. *331127*

(4.1.5) 7/25/2016

Pro1099

- Creating an IRS submission file was failing when the TCC code was associated with many profiles. *314352*

ProForm

Order

Closing Disclosure Form

- An error was occurring when two templates were applied and the first template contained charges which took up all lines available in a given section of the CDF. *319894*
- Lines that were deleted from CDF Page 2 of a CDF template were incorrectly showing up in new orders created off the template. *295831*

Documents

Attachments

- In certain situations, Windows Server 2012 users were experiencing application crashes after searching on the Attachments screen & then clicking outside of the Attachments screen. *319880*

Edit Mode

- An Object reference error was occurring when users searched for ReadyBlocs & then double-clicked an item in the search results. *331896*

Reports

- Users were unable to print crystal reports due to directory path error. *323727*

ProTrust

Transactions

- When reconciling by trust accounting date, users were unable to reassign a cleared transaction or clear a reassigned transaction due to a trust accounting date validation. *281884*

Reports

Escrow Trial Balance (Balances only) – Daily and Monthly –

- The **Escrow Trial Balance (Balances Only)** Report by Transaction Date was not correctly pulling the "Last Activity Date.” *334145*

IOLTA

- The **IOLTA** report by Transaction Date was not correctly pulling the "Last Activity Date." *335758*

SPAdmin

Managers

- Assigning a large number of profiles to the same manager was generating a "could not execute query" error due to a character limit within the application. *325509*

Check Printing

- Upgrades from 4.0 to 4.1 were disassociating custom checks from the check printing manager. *333827*

Fee Schedules

- The Fee Schedule Manager wasn't allowing a sufficient number of digits to ensure the accurate transferring/recording of tax calculations on larger amounts. *329129*

Getting Help with SoftPro Select

Accessing Help

You may also use the F1 key at any time to view and print hundreds of how-to topics that are related to your location in the program. You may also press the button in the toolbar to access help. The help system is designed to answer most of the questions you will have as you use the program.

Technical Support

The SoftPro Solution Center is available to you by telephone at (800) 848-0143 and is open from 8:00 A.M to 5:00 P.M. Monday–Friday during your local time. Platinum level support hours are from 8:00 A.M to 10:00 P.M. EST Monday–Friday and 11:00 A.M. to 2:00 P.M. EST on Saturday.

You can extend technical support service by subscribing to SoftPro's Annual Maintenance Service program. Subscribing to Platinum Maintenance Service gives you access to technical support for longer hours Monday–Saturday. For more information, call SoftPro Sales at (800) 848-0143. You can email SoftPro Sales at sales@softprocorp.com.