SoftPro Select 4.2.1

Release Notes | December 22, 2016

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SoftPro Select v4.2.1 (4.2.41028.10)

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Summary

This release includes three major changes:

- **Select Automation**: Functionality has been added which provides organizations with the tools to execute certain processes with no action required from the end user. Administrative users will have the ability to create automated actions for their processes to help improve quality, consistency, and productivity, while reducing risks
- **My Work Items**: The My Orders panel has been renamed to My Work Items and now gives a view into Work Lists.
- **Microsoft Application Insights**: SoftPro will now be using Microsoft's Application Insights to help monitor application performance, assist in diagnostic processes, & improve the application.

Select Automation

Automation provides organizations with the tools to execute certain processes, with no action required from the end user. Administrative users will have the ability to create automated actions for their processes to help improve quality, consistency, and productivity, while reducing risks. Automation processes use predetermined triggers and conditions to automate actions and will occur without any intervention by the user. Processes can be configured to handle a multitude of different activities, but **two common scenarios** would include:

- Apply templates automatically.
- Update or add tasks automatically.

The key areas of the application that are changing with this new functionality are in SPAdmin:

- An Automation folder has been added. It contains:
  - A new process manager.
  - A new monitoring manager.
- Several new permissions have been added.

Please refer to the **Select Automation User Guide** for detailed discussion and examples.

Application Insights

SoftPro will now be using Microsoft's Application Insights, a best-in-class software metrics service. Application Insights will be activated by default and will allow SoftPro to monitor & improve application performance, assist in diagnostic processes, develop updates, & create new support resources for users.

As part of its normal function, SoftPro Select will now periodically transmit diagnostic and technical information to SoftPro pertaining to your computer system, incidents, and usage of the application.

- The data will not include any non-public personal information.
- The data will not personally identify you or your customers.
- Transmission of your information to SoftPro is voluntary; if you wish to opt out of this function at any time, please contact support@softprocorp.com.

About

All data sent to SoftPro is **anonymous**; it is relayed to SoftPro with respect to a customer license number. The following data may be sent to SoftPro:

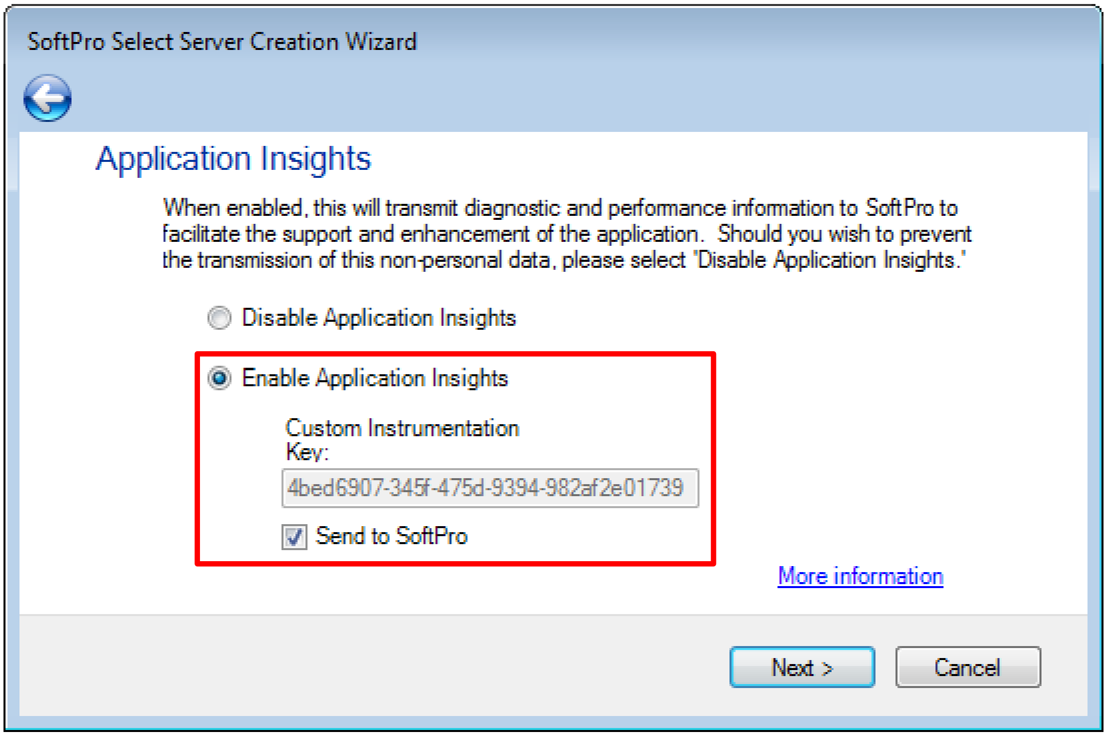
- Select version number.
- Event performance: order save time, ledger save time, etc.
- Error details.
- Usage metrics: number of order saves, searches, etc.
- Work queue length: report queue, notification queue, etc.

Installation

New 4.2 installations or server upgrades (middle-tier server pool or standalone server) will include Application Insights. Note that for these changes to take effect, you must restart your middle-tier(s).

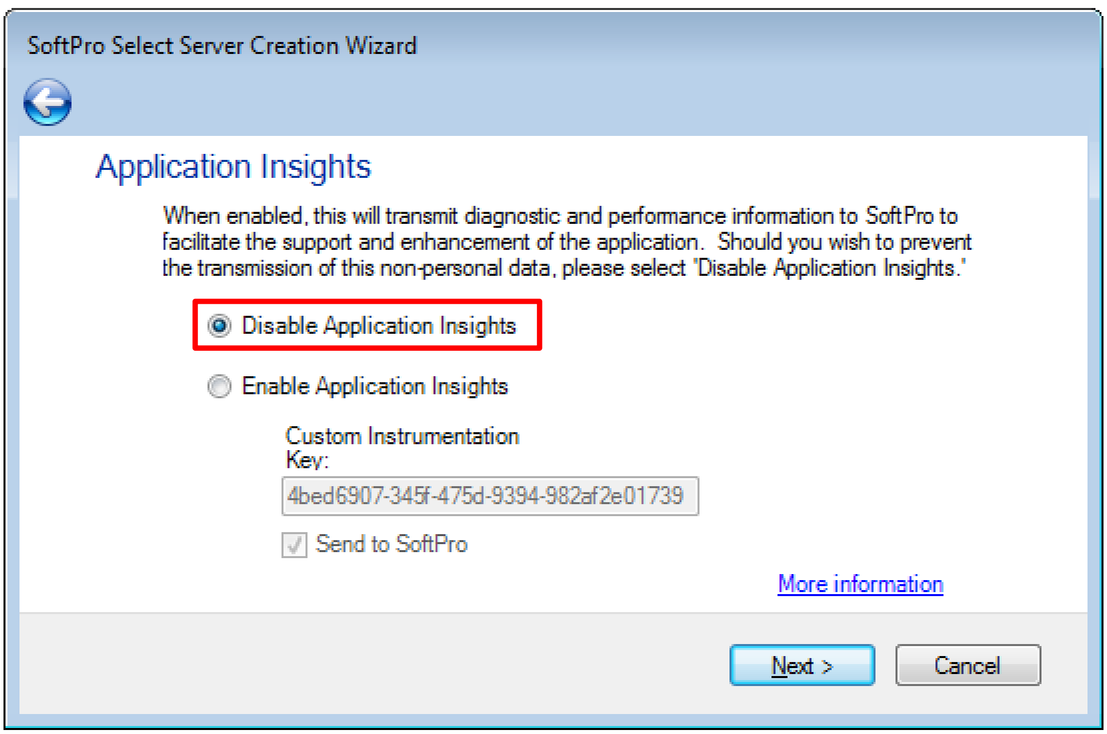
The following screen allows you to specify your settings. Click **Next** when you are ready.

1. The first screen defaults as follows; data will be sent to SoftPro:

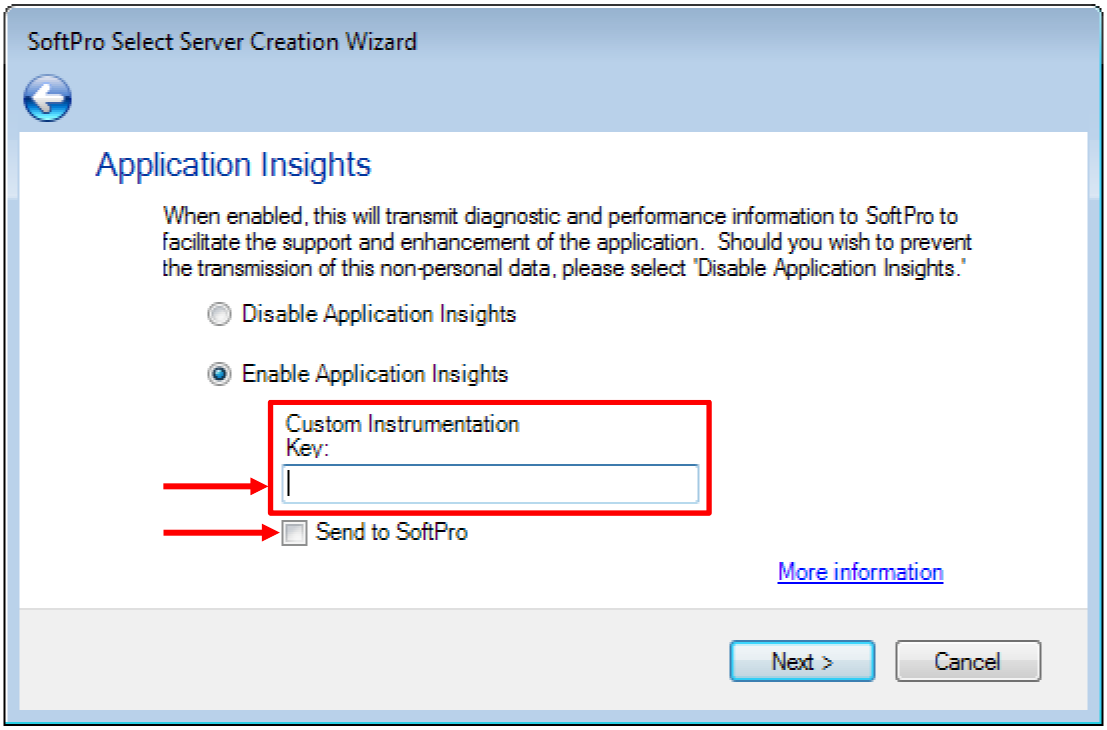


- **Enable Application Insights** is enabled.
- **SoftPro's Application Insights key** is input here.

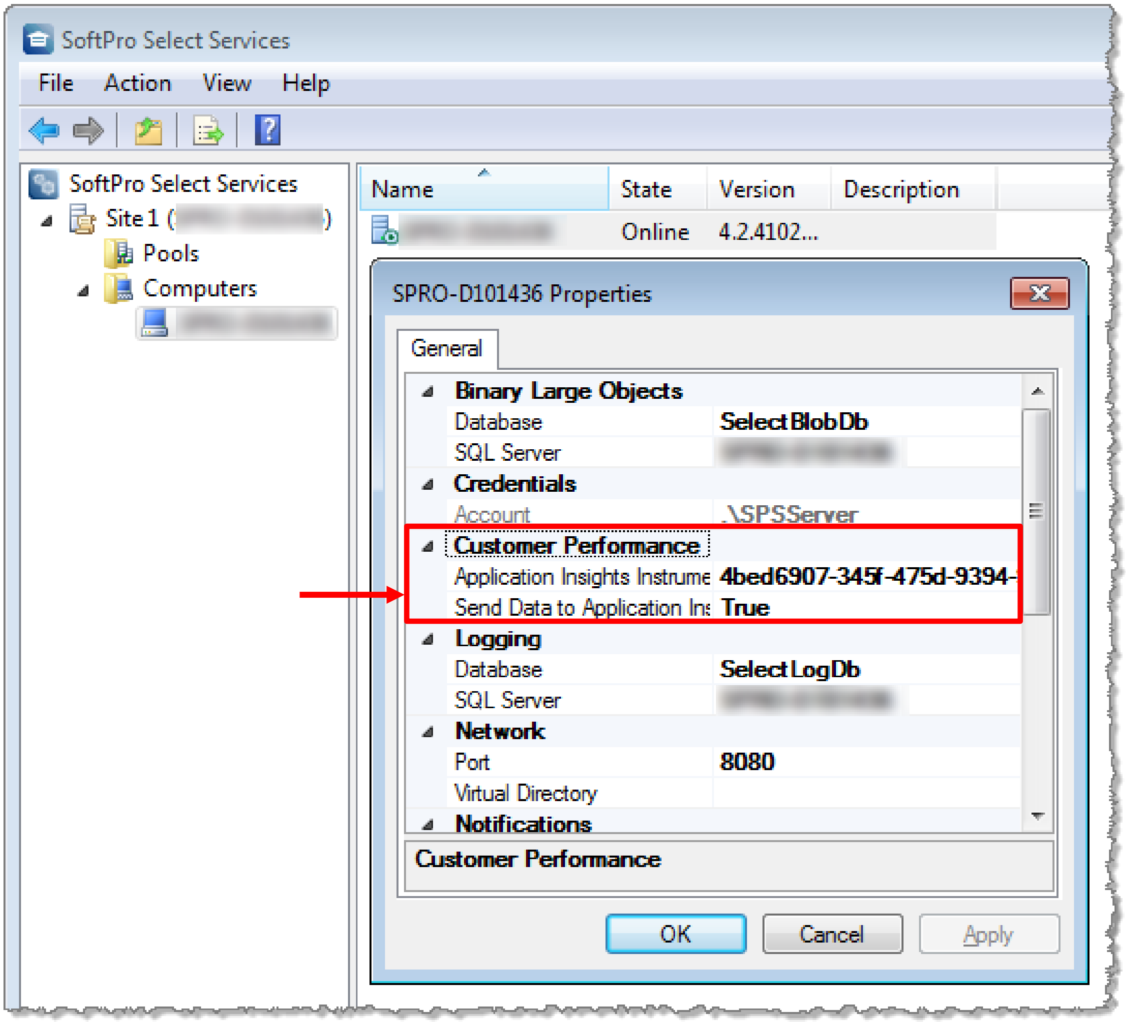
2. You may **Disable Application Insights** if you wish; you may turn it on or make changes later:



3. You may opt to use your own Application Insights account and send data to yourself. No data will be sent to Softpro. **Uncheck Send to SoftPro** and input your own **Instrumentation Key**:



4. If you wish to make changes to your Application Insights configuration, you may access via **SoftPro Select Services**:



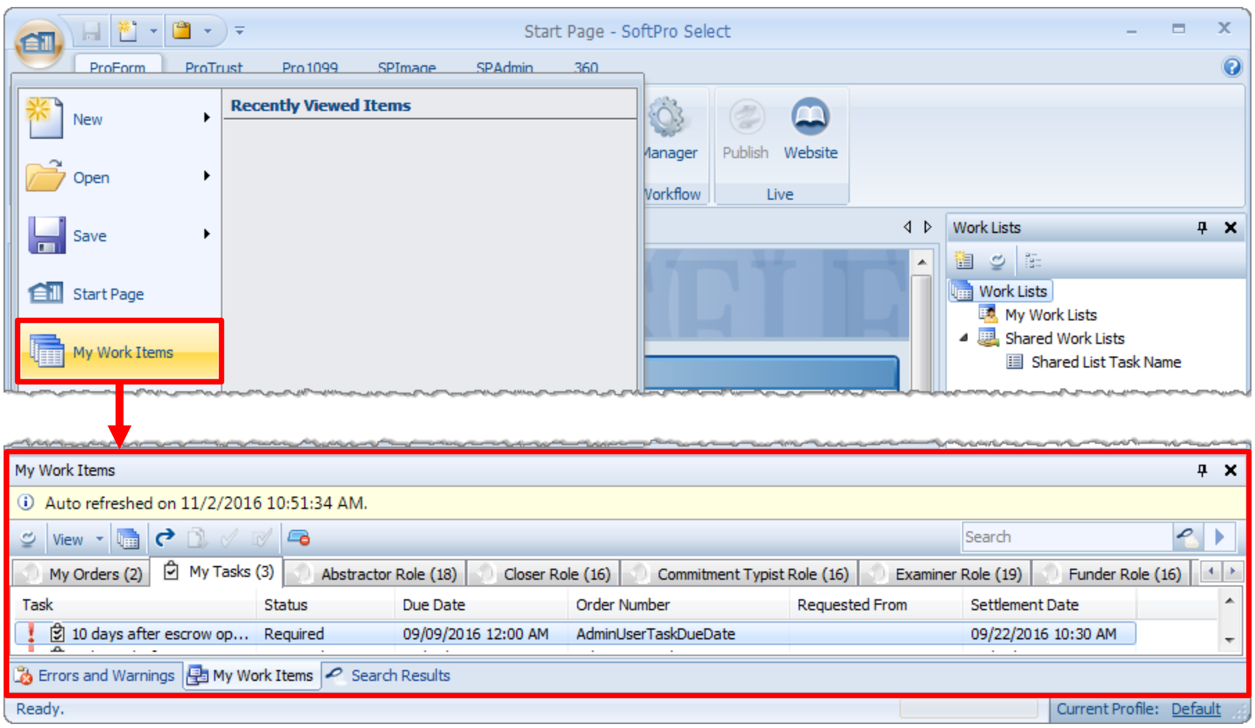
- If you do not see your machine under the **SoftPro Select Services** item in the pane at left, you may need to right click and select a computer to manage.
- After drilling down and selecting a computer in the pane at left, double click the server in the pane at right to view the configuration options.

My Work Items

The **My Orders** panel at the bottom of the screen has been renamed to **My Work Items**. This panel now gives a view into Work Lists.

Access

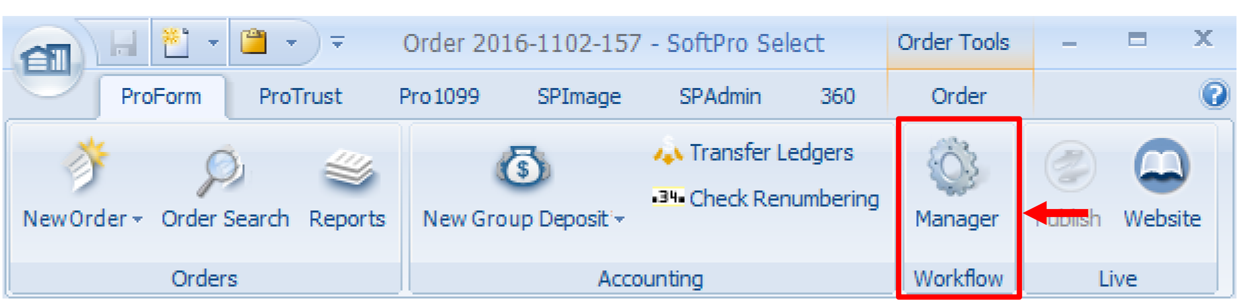
Access **My Work Items** in the panel at the bottom of the screen. You can reopen it through the main menu:



Layout Changes

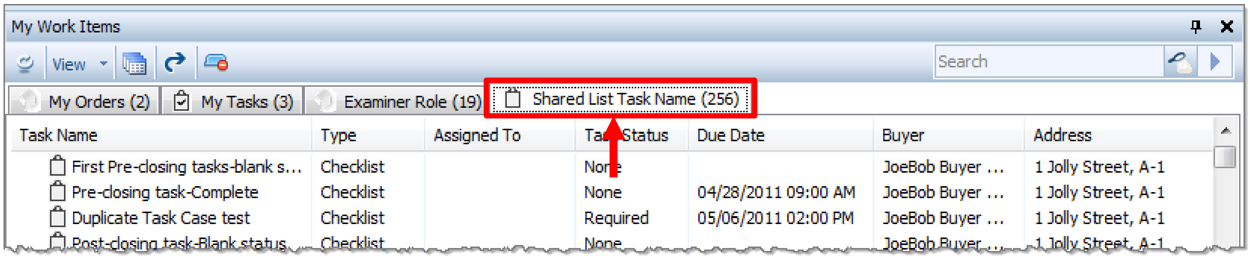
Workflow Order Manager

This is now only accessible from the ribbon at the top of the screen under the **ProForm tab**:



Work Lists

Work Lists results are now available in the same panel with **My Orders** and **My Tasks**.



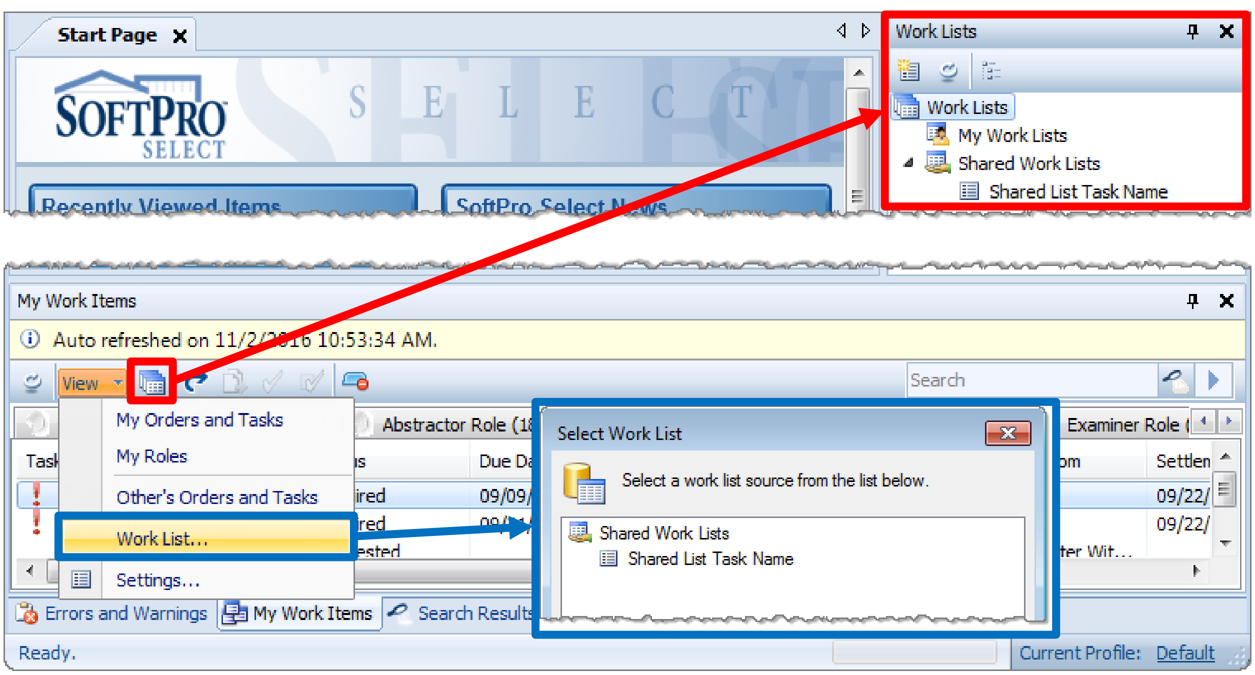
Filter

The **Filter was removed** from my work items; the Filter Queue permission was also removed from SPAdmin:

Accessing

You have two ways to access **Work Lists**:

1. You will still **create** Work Lists in the **original location**.
2. You can **view** Work Lists results in this **new panel** OR the **original location**.

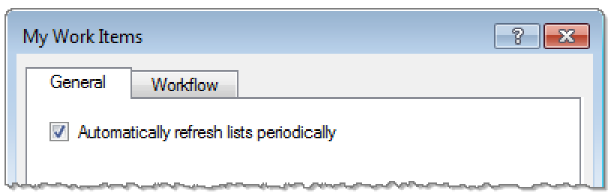


Toolbar

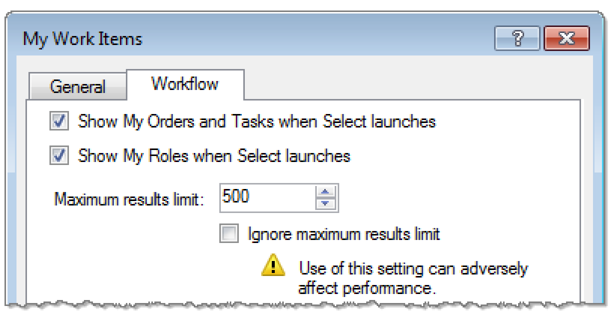
Use the buttons at the top of the panel to change what you see and complete various actions. You may also right click on an item to access most of these options:

- **Close**:  This button will close the tab you are currently viewing.
- **Open/Submit**:  Open or submit the item currently selected in the list.
- **Work Lists**:  Open the **Work Lists panel** where you may create/view/manage your work lists. This does NOT open the Work Lists tab.
- **View**: 

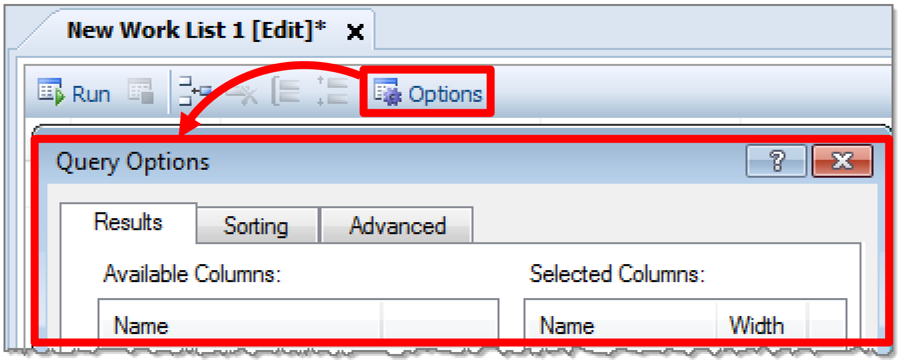
This allows access to a menu containing several options:
    - **My Orders and Tasks**: Opens **two separate tabs** for orders and tasks.
    - **My Roles**: Opens **a separate tab for EVERY role** that you are assigned.
    - **Other's Orders and Tasks**: Opens a dialog, that allows you to select other users and then open and view their orders and tasks in separate tabs.
    - **Work List**: Opens the new Work Lists tab.
    - **Settings**:
        - **General Tab**: By default, Work Items will refresh every 2 minutes. You may turn this off with the checkbox here and use the refresh button instead:



        - **Workflow Tab**: Use this tab to set your Workflow defaults. You can specify whether or not My Orders, Tasks, or Roles are displayed when the application launches.



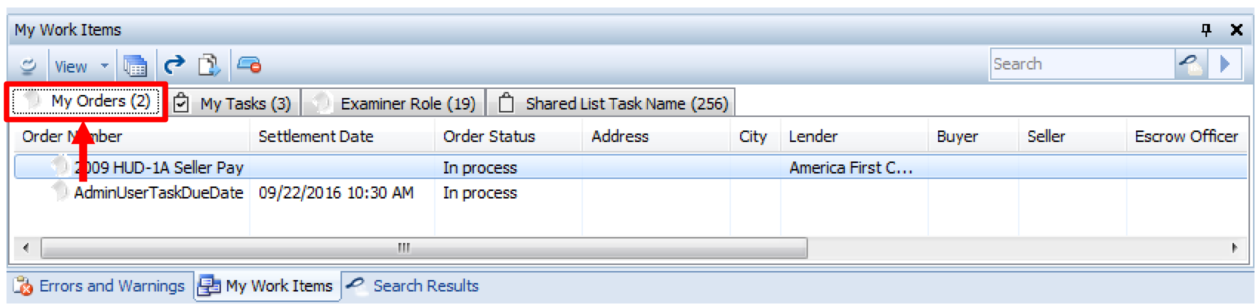
            - You may specify the number of results you receive, or use the checkbox to return all results.
        - **Remember:** Work List settings are located under the **Options** when creating Work Lists:



- **Refresh**: Refreshes the list of items.

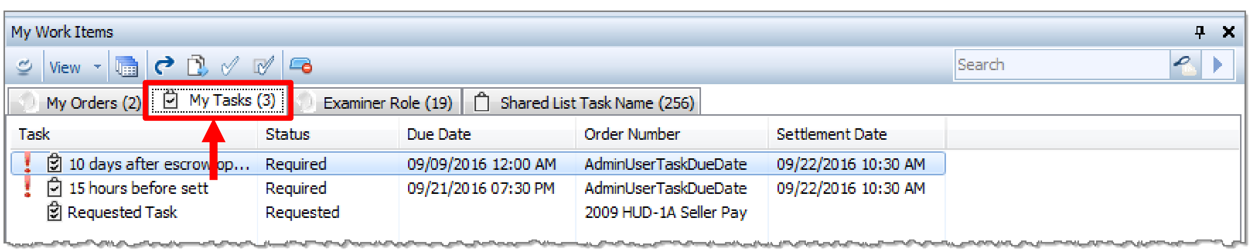
My Orders

Any orders assigned to you are shown in this tab; they are now separated from your tasks and are visible by default. The toolbar buttons are explained above. My Orders are visible by default.



My Tasks

Any tasks assigned to you are shown in this tab; My Tasks are visible by default:



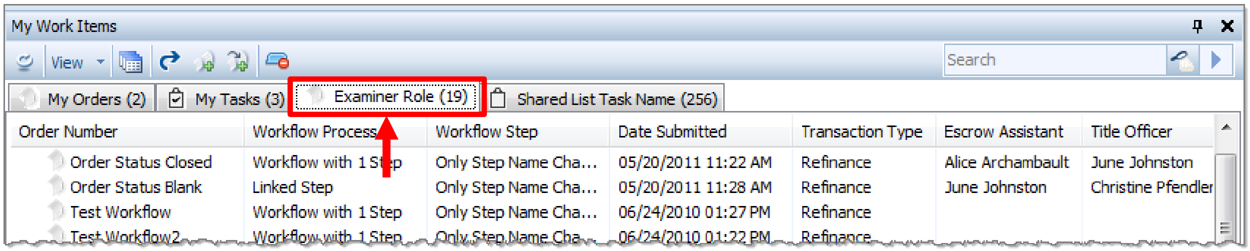
Toolbar

There are two buttons that are unique to this panel. These used to be **Change Task Status**:

- **Mark Completed/Received**: Use this to mark a selected task as completed/received.
- **Mark Requested**: Use this to mark a selected task as requested.
- The rest of the buttons visible here are explained above.

Role

User **Roles** & **Other's Orders and Tasks** need to be selected from the view menu in order to see them:



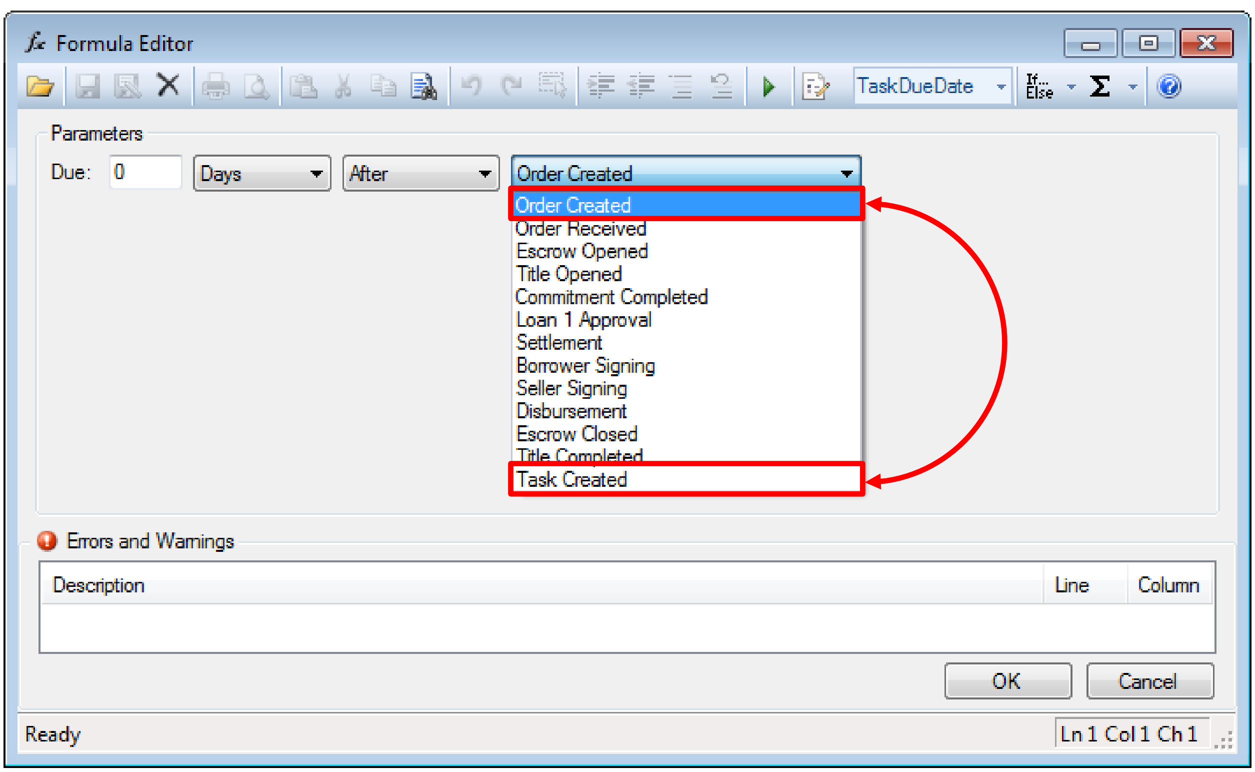
Toolbar

There are two buttons that are unique to this panel:

- **Add** : Open or submit the item currently selected in the list.
- **Submit**: Open or submit the item currently selected in the list.
- The rest of the buttons visible here are explained above.

Miscellaneous

The **Order Created** & **Task Created** parameters are now visible on the **TaskDueDate formula** in the formula editor **if** the user is on a checklist or requested task. **Note**: The editor is accessible via F8.



4.2.1 (12/22/2016)

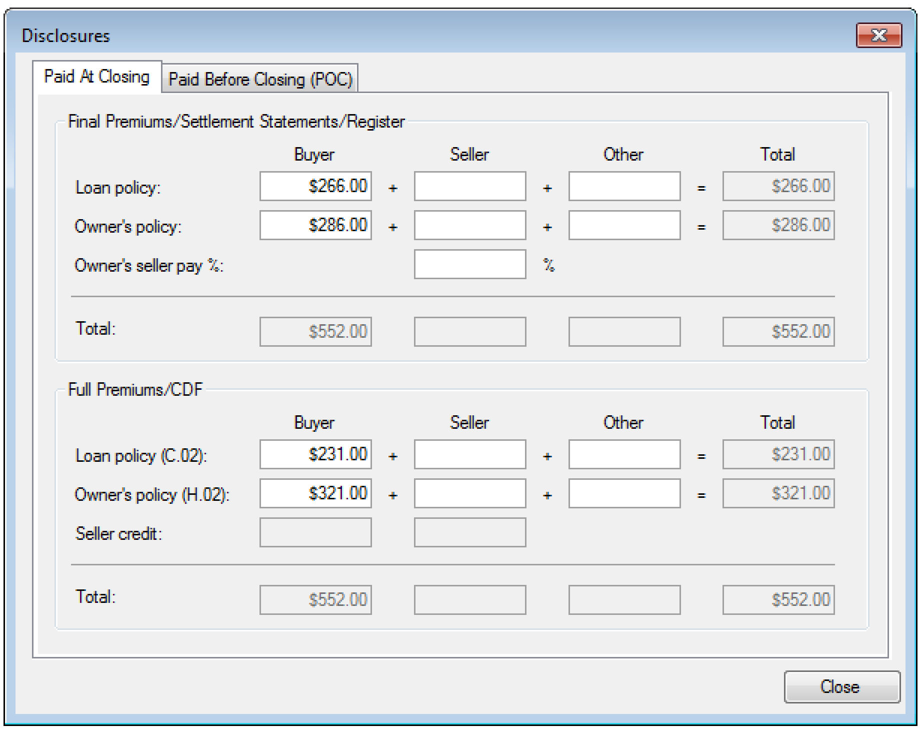
ProForm

Title

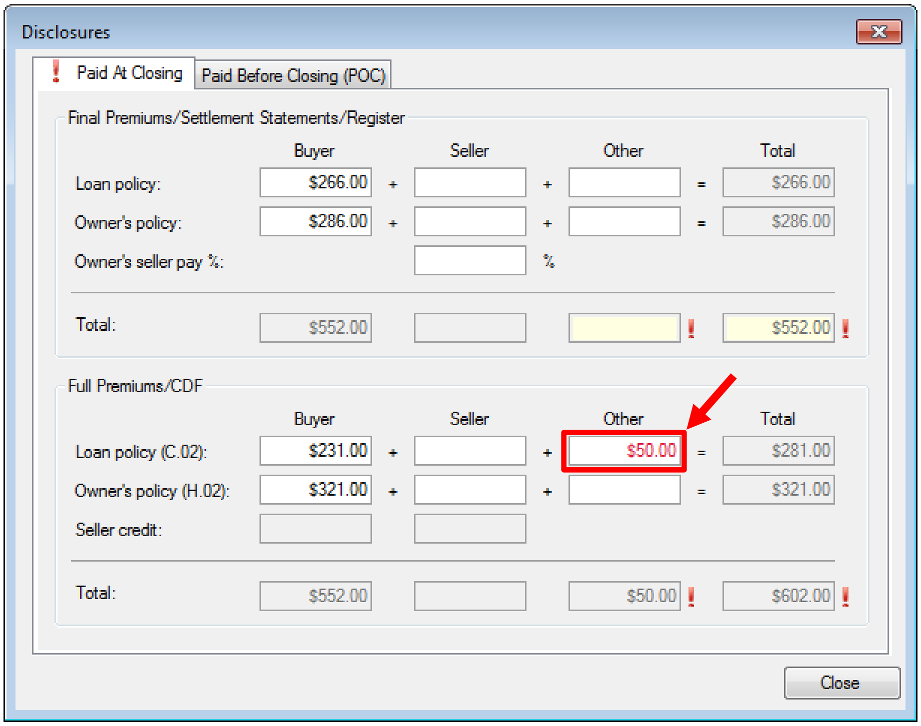
Several changes have been made to title premiums, with a focus on how seller pay amounts are handled on CDF orders. 293534

Title Insurance Premiums

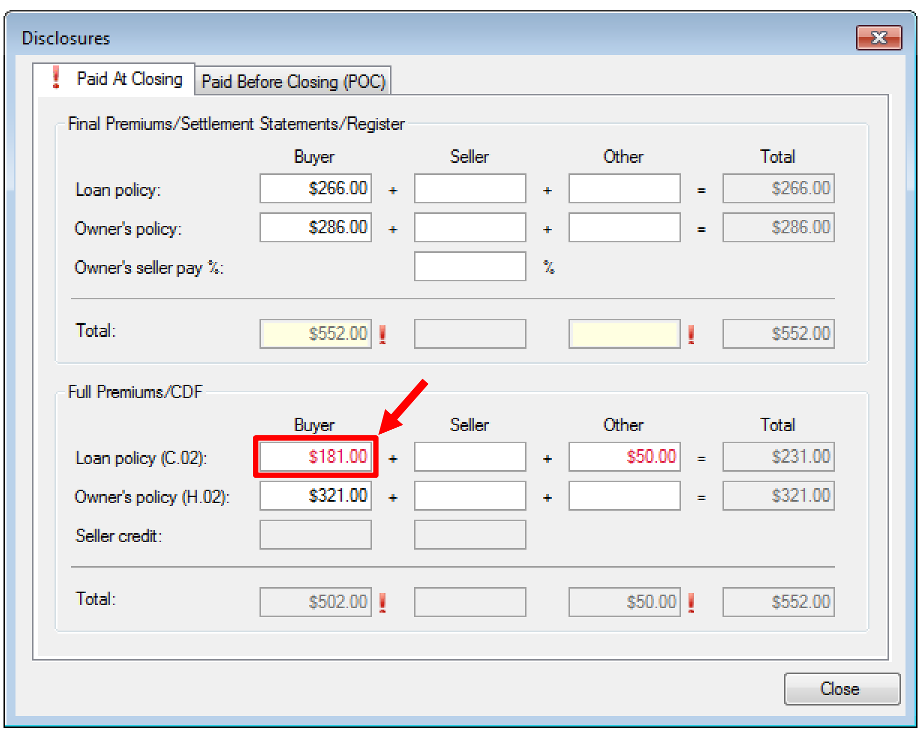
- The **Disclosures dialog** will now auto-calculate and balance the other amount columns when a **Final Premium** amount on the **Paid at Closing** tab is edited.
    - These calculations will not impact amounts on the Paid Before Closing (POC) tab.
- **Example 1**: Money is moved in the full premium section to account for a paid by other amount.
    - This particular order is balanced:



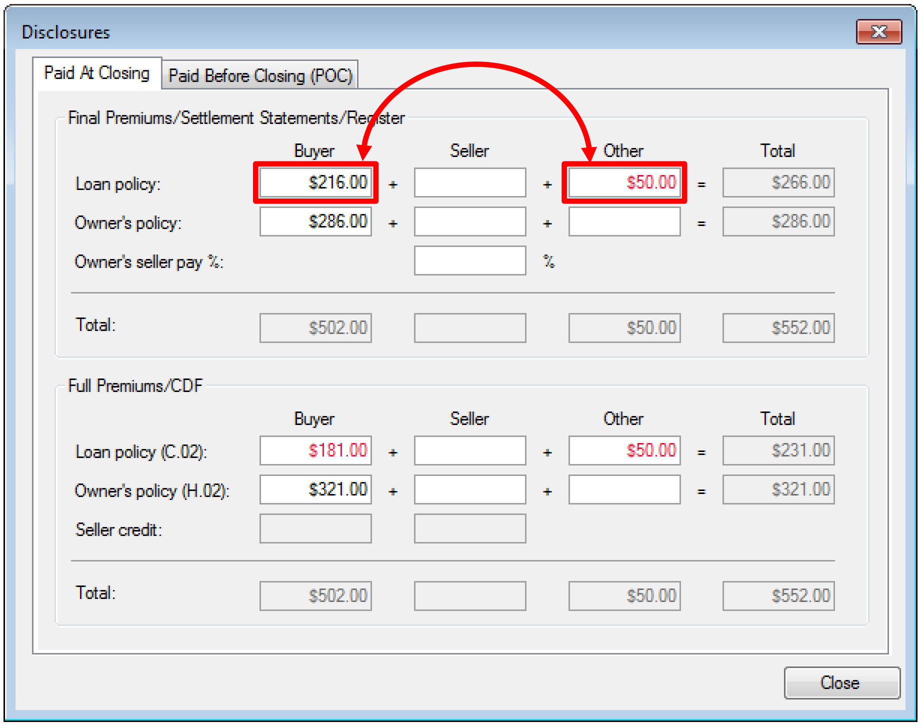
    - $50 of the Loan Policy will be paid by others on the CDF, so the user moves $50 to account for this. Disclosure dialog is now out of balance:



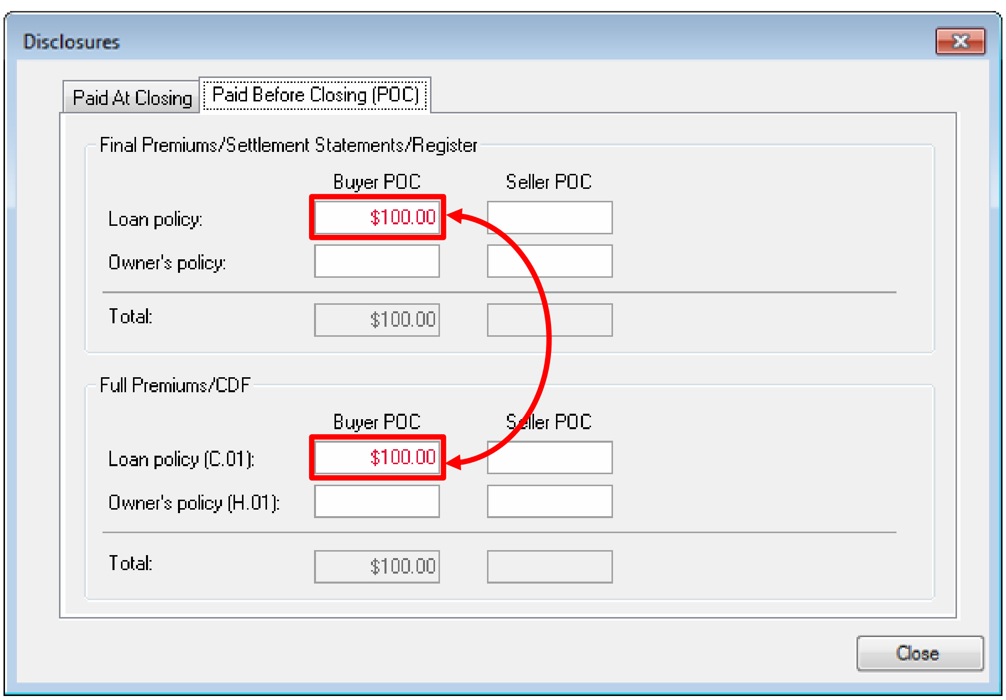
- To correct this, $50 is manually subtracted from the Buyer Full Premium Loan Policy amount. This brings the Full Premium area into balance:



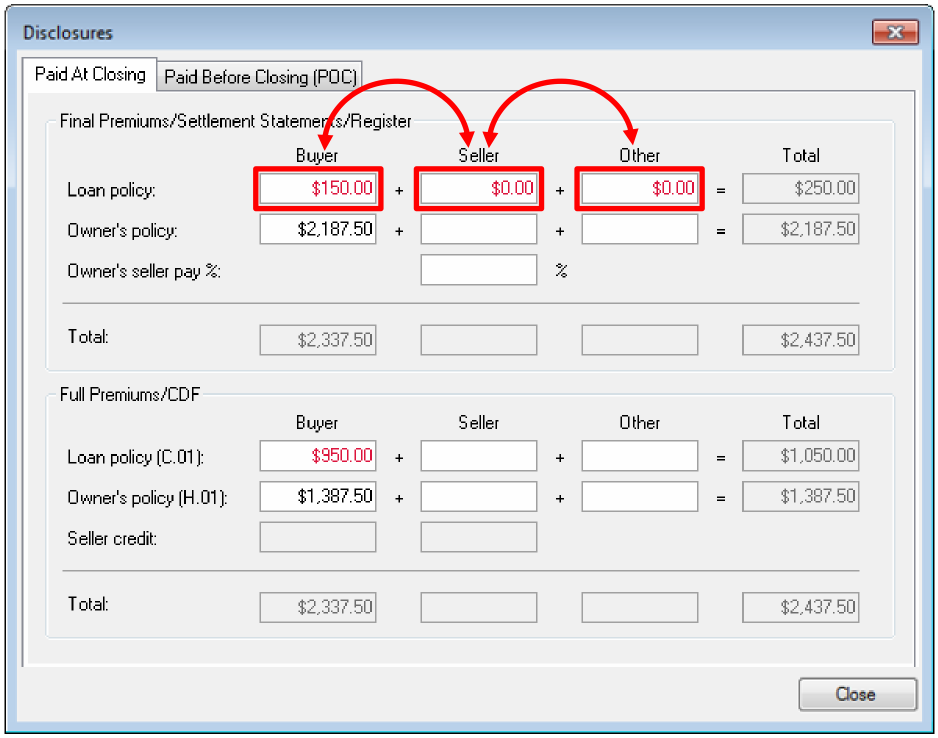
- To balance the Final Premiums, the users only has to input $50 in the Final Premium Loan Policy Other field; the application automatically balances the amount in the Final Premium Loan Policy Buyer field:



- **Example 2**: A POC Amount is included.
  - A POC amount of $100 is added:

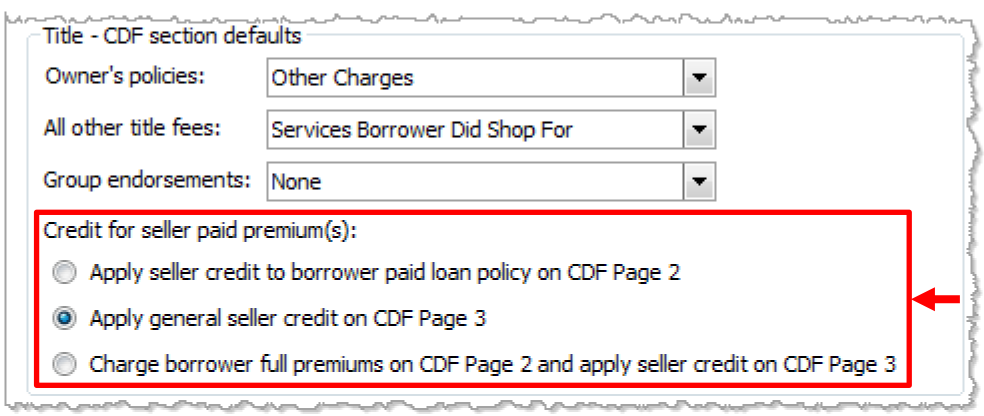


- You must enter the non-POC amounts on **all 3 amount Paid at Closing amount columns**:



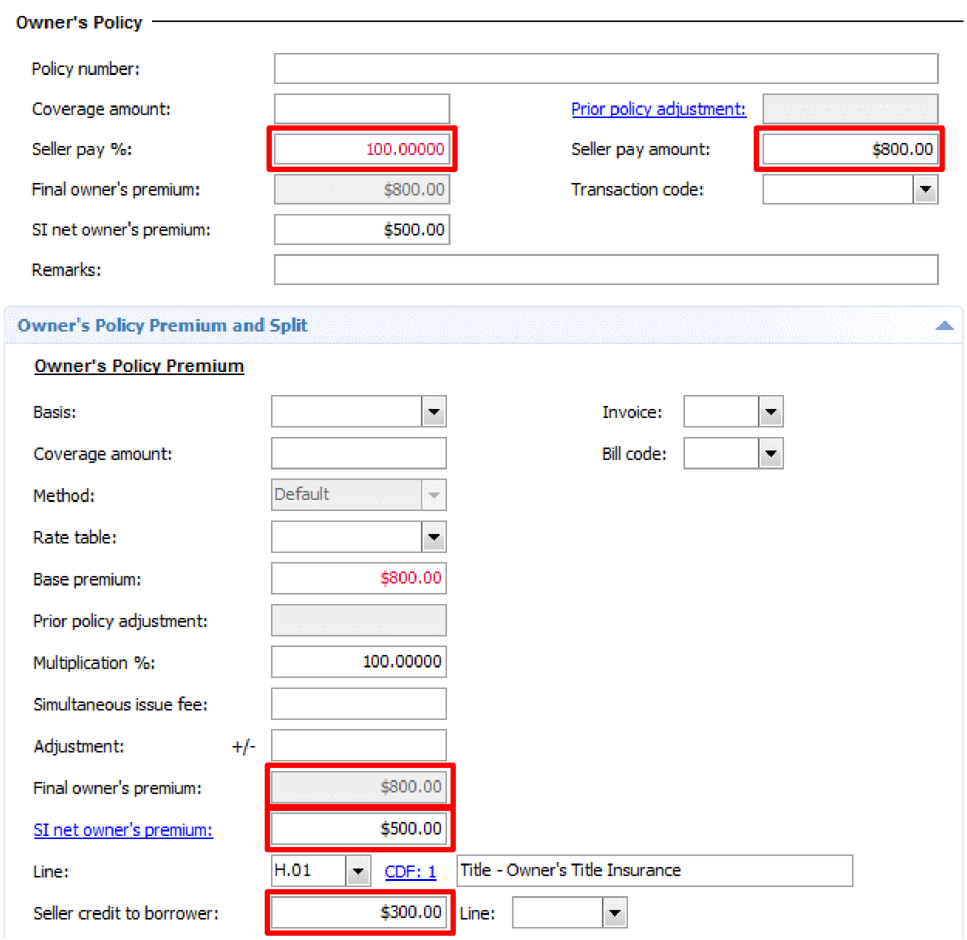
Options

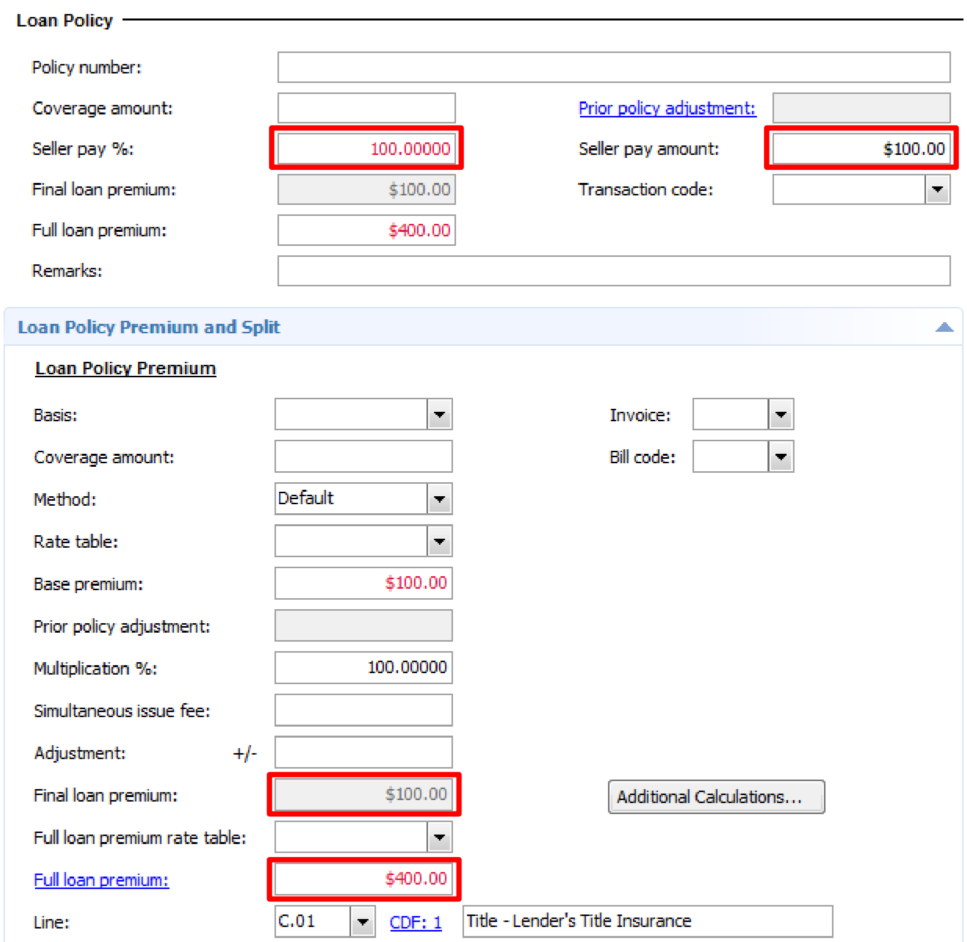
- Three **Credit for seller paid premium(s)** options have been added to the CDF Options screen in the **Title – CDF section defaults** section:



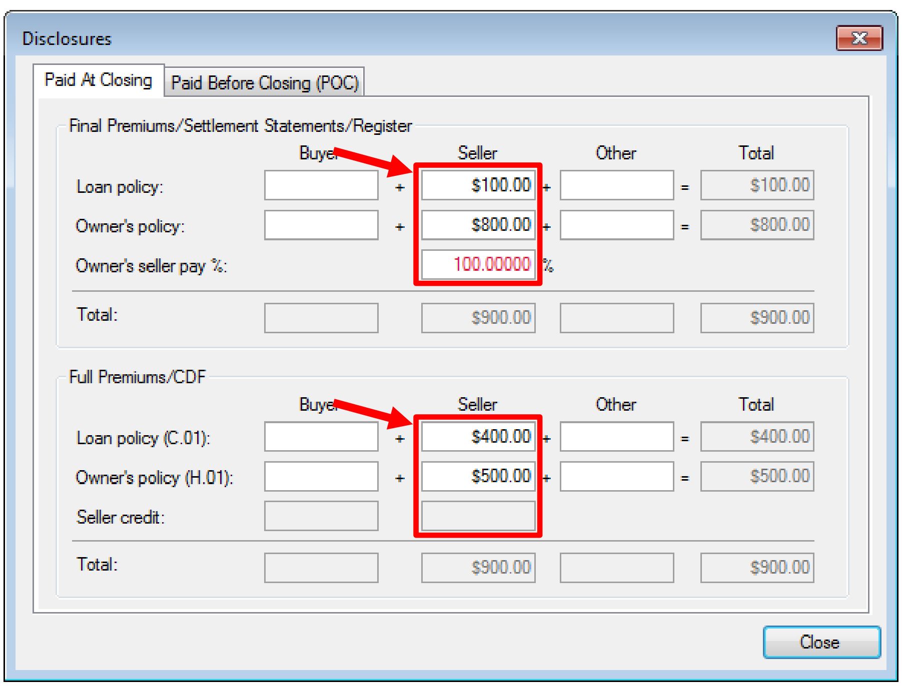
  - These are only available with CDF orders, and apply when the **Show Full Premium on CDF/HUD-1 option** is selected on a Simultaneous issue policy.
    - **Apply seller credit to borrower paid loan policy on CDF Page 2**:
      - If your lender requires the seller credit for the Owner Policy premium to be applied to the loan policy, select this option.

        - The credit amount will be subtracted from the borrower-paid loan policy and then added to the seller column on the loan policy premium CDF line.
    - **Apply general seller credit on CDF Page 3**:
        - This is the default. The existing **Seller credit to borrower** amount will be sent to the selected line and also be reflected on the Disclosure screen “Seller credit (X.xx/X.xx)” Buyer and Seller amount fields.
    - **Charge borrower full premiums on CDF Page 2 and apply seller credit on CDF Page 3**:
        - If you check this option, final premiums paid by the seller will be shown as a credit on CDF Page 3 and the full premium will be charged to the borrower on CDF Page 2. You will have to select a CDF line for the seller credit amount.
- Important: The seller credit to borrower must be the excess that the buyer has paid of the full premium when compared to the borrower’s portion of the final premium.
    - Here, on the Title Insurance Premiums screen, you can see that both the Loan Owner’s Policy ($800) & Loan Policy ($100) are 100% seller-paid:

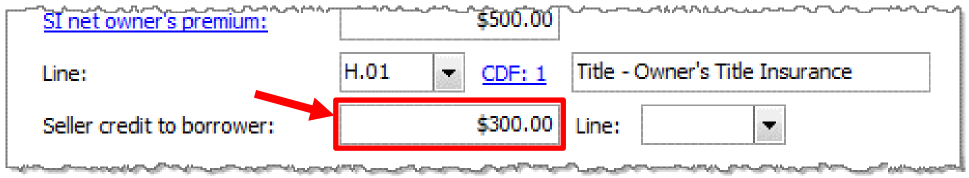




- The amounts are balanced correctly in the Disclosures Dialog:



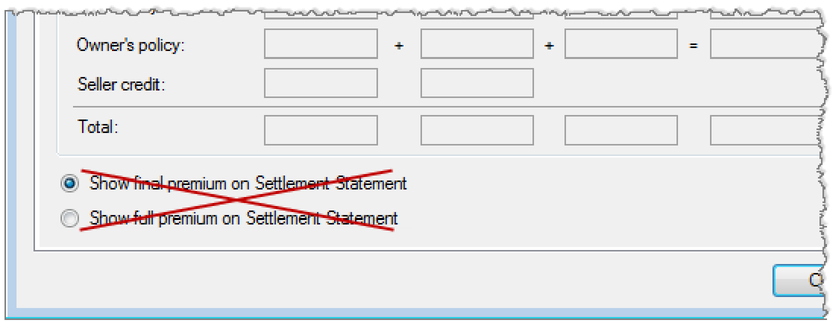
- The **Seller credit to borrower** field under the Owner's Policy calculates to $300. It is only used when the full premium charge to the seller is less than the final premium charge to the seller:



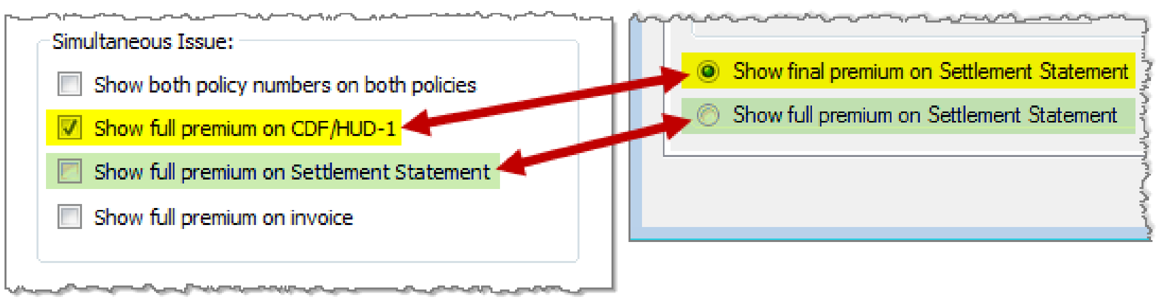
- This applies to the options 1 & 2 discussed above.

Disclosures

- **Disclosures Dialog**: The radio buttons at the bottom of the dialog have been **removed**:



  - These functioned the same as the checkboxes on the Title Insurance Premiums screen, and it was determined that they were not needed on this dialog:



Escrow

Recording Fees

- An adjustment was made so that existing orders will not change if there is only one value in the fee schedule dropdown and that fee schedule is modified, disabled, or added. *355313*

Cash to Close

- A warning message was added when the Calculating Cash to Close table's final amounts on the Optional Page 3 were modified, as this affects the final cash to/from buyer. *346325*

Documents

Attachments

- An error was occurring when users selected an Outlook email that had been saved as an order attachment and then tried to send via the email option. *230883*

Rendering

- Users weren't able to render documents when logged in under profiles that were not associated with office hours. *356770*
- The document selection dialog will now list items in chronological order (for all areas other than order contacts, which will remain alphabetical). *346131*

Settlement Statements

- The ALTA and Master Settlements statements were not printing the **Paid by on behalf of Borrower** verbiage when the Order Policy type was set to Owners or Loan. *352290*

Register

- An erroneous pending receipt was being created automatically when a credit was added from a revenue contact & realphabetized after transactions had already been posted. *338748*
- The vertical scroll bar was not working when the register was accessed in read-only mode. *221191*
- In rare situations, an object reference error was occurring during order save. *269806*

ProTrust

Reports

- Deleted and Voided IBA transactions were appearing on reports dealing with IBA beginning & ending balances, even when the Balances were zero. *337877*

Statement Proofing Register --- Recon ---

- Reports were off if any of the cleared transactions were reassigned. *352610*

Fee/Revenue Ledger

- The disburse transferred funds process was running very slowly when large numbers of transactions were present. *339959*

SPAdmin

Managers

Fee Schedules

- **Search**:

- A search bar has been added to the City/County Tax/Stamps Manager, Recording Fees manager, and State Tax/Stamps manager. *356028, 356026, 356030*
- The search result limit has been set at 500 items. *356027, 356025, 356029*

Custom Fields

- The search result limit has been set to 500 items. *356040*

Rate Tables

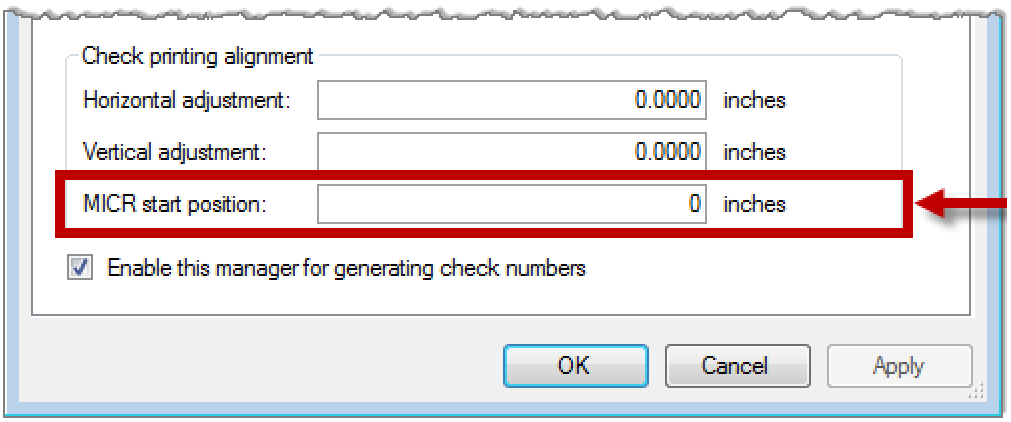
- The search result limit has been set to 500 items for discount & premium rates. *356042, 356041*

Document & Report Trees

- **Search**:
  - Search has been added to the Pro1099, ProTrust, ReadyBlocs, ReadyDocs, & Reports trees. *356039, 356038, 356033, 308832, 356037*
  - The result limit has been set to 500 items. *356032, 356031, 356034, 356036, 356035, 356043, 308831*

Check Printing

- The MICR Starting Position has been added to the Check Printing Manager. This is applicable to custom check development and allows for horizontal adjustment of the MICR line. *334970*

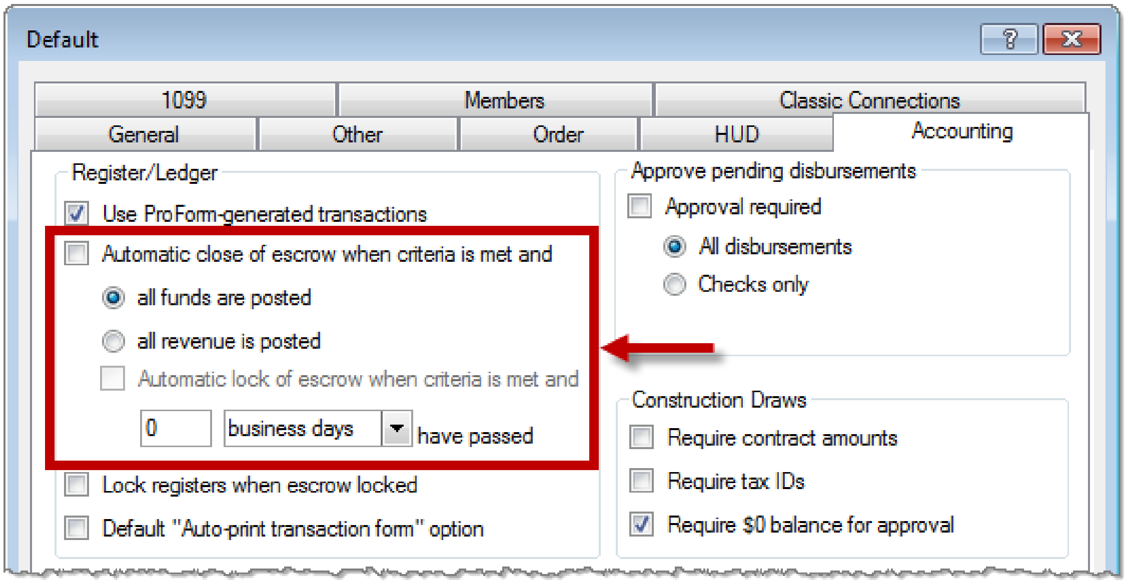


Policy

- The Policy Manager now loads a maximum of 500 policies by default. *341514*

Profiles

- The Automatic close and lock escrow options have been modified in **SPAdmin** > **Profile** > **Accounting Tab** > **Register/Ledger**. *345357*



- **Automatic close of escrow when criteria is met and**: This is unchecked by default. If this option is checked, the escrow status of a ProForm order will automatically change to "closed" once the criteria beneath are met:
  - **All funds are posted**: use this radio button to close escrow when all funds are posted. The criteria that must be met are as follows:
    - Must be a ProForm order, not a ProForm template.
    - The Order balance total must equal $0.00.
    - The Ledger balance total must equal $0.00.
    - The IBA balance total must equal $0.00.
    - The ledger must have at least one posted receipt and one posted disbursement; this 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, completed, or closed.
  - **All revenue is posted**: use this radio button to close escrow when all revenue funds are posted. **Note**: if you have no revenue contact disbursements, all receipts and disbursements must be posted to auto-close. The criteria that must be met are as follows:
    - Must be a ProForm order, not a ProForm template.
    - The Order balance total must equal $0.00.

- The ledger must have at least one posted receipt and one posted disbursement; this prevents auto-close of an order that has been started and does not have any amounts entered yet.
- All revenue receipts have a posted or voided status in the register (not pending).
- All revenue 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, completed, or closed.

▪ **Automatic lock of escrow when criteria is met and**: If this checkbox is checked, the user may specify exactly how many additional business days or hours must elapse before escrow is locked. Enter “**0**” (zero) to immediately lock escrow once the order is closed and the lock criteria is met.

Technical

Server

- Support has been added for Microsoft SQL Server 2016. *336703*