# SoftPro Select 4.2.3.1

Release Notes | March 23, 2017

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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:

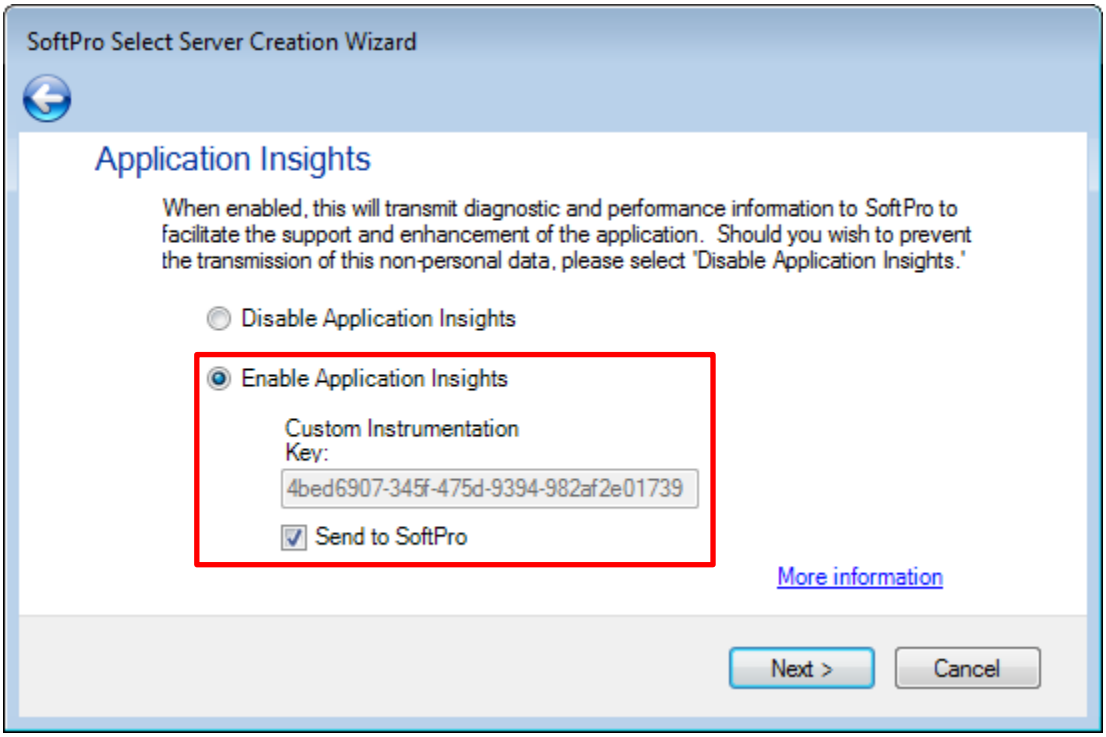
- Select version number.
- Event performance: order save time, ledger save time, etc.
- Error details.
- Usage metrics: number of order saves, searches, etc.
- Work queue length: report queue, notification queue, etc.

### 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).

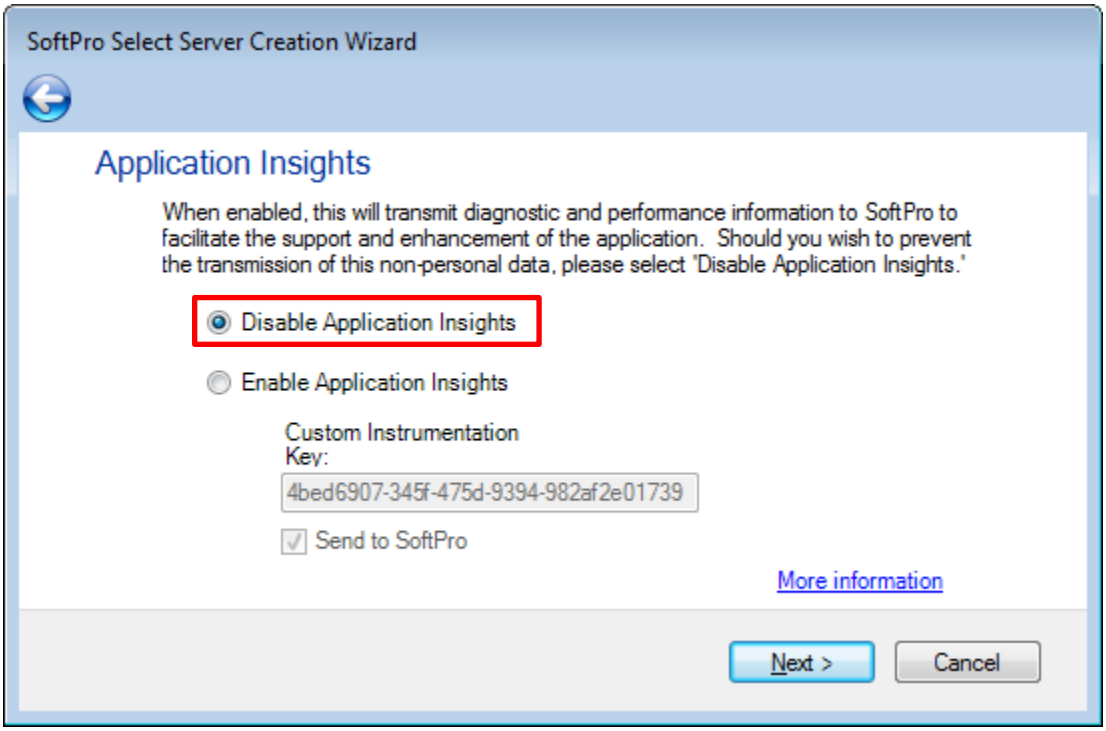
The following screen allows you to specify your settings. Click **Next** when you are ready.

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

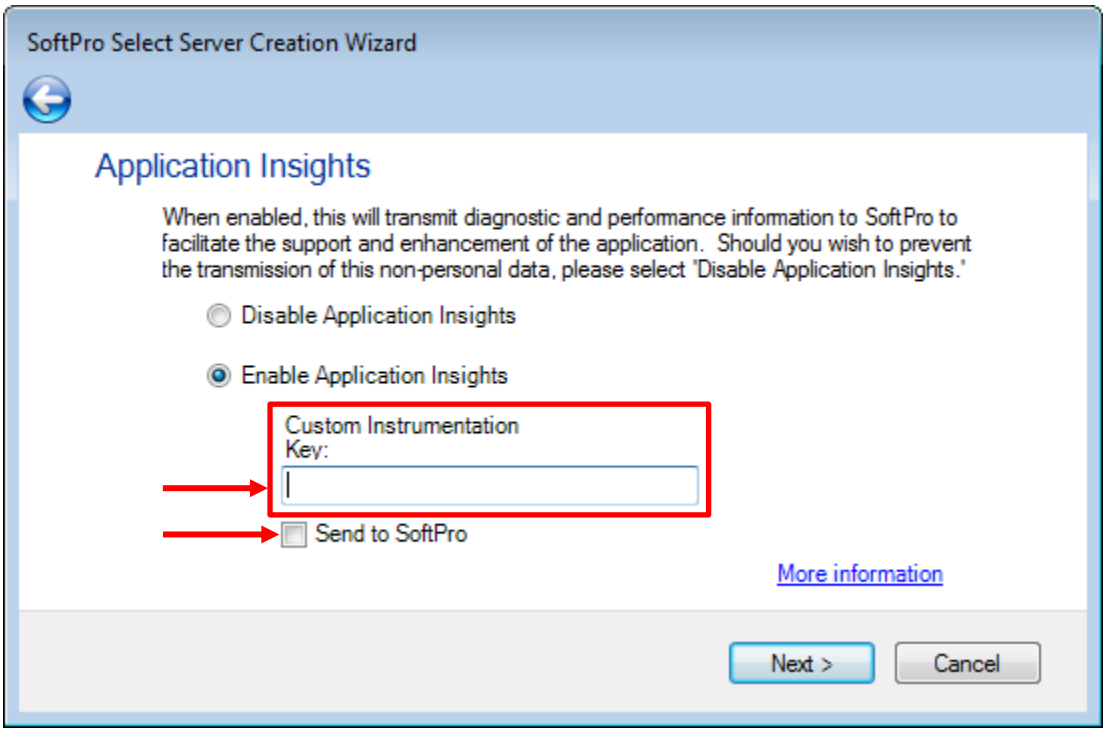



- **Enable Application Insights** is enabled.
- **SoftPro's Application Insights key** is input here.

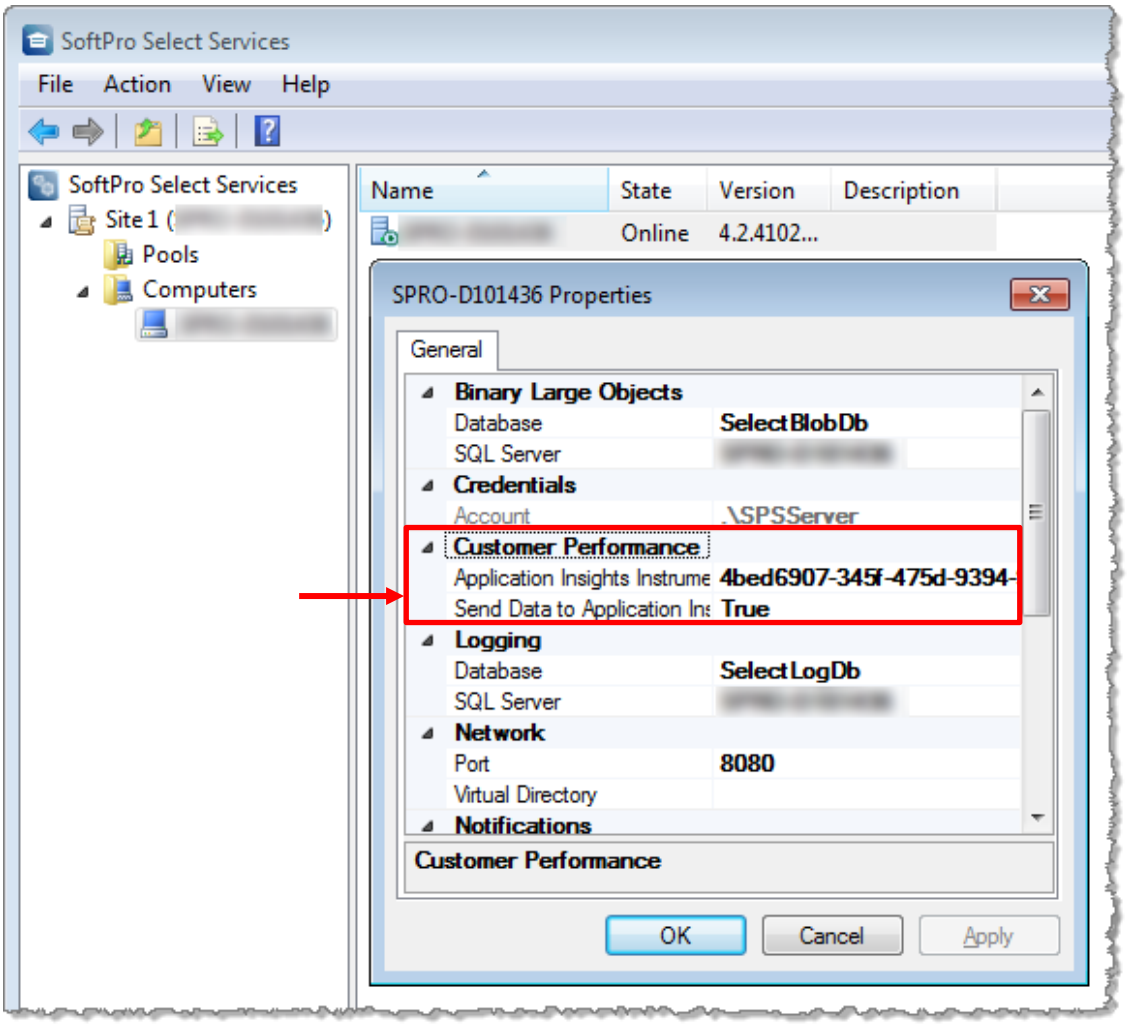
2. You may **Disable Application Insights** if you wish; you may turn it on or make changes later:



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**:



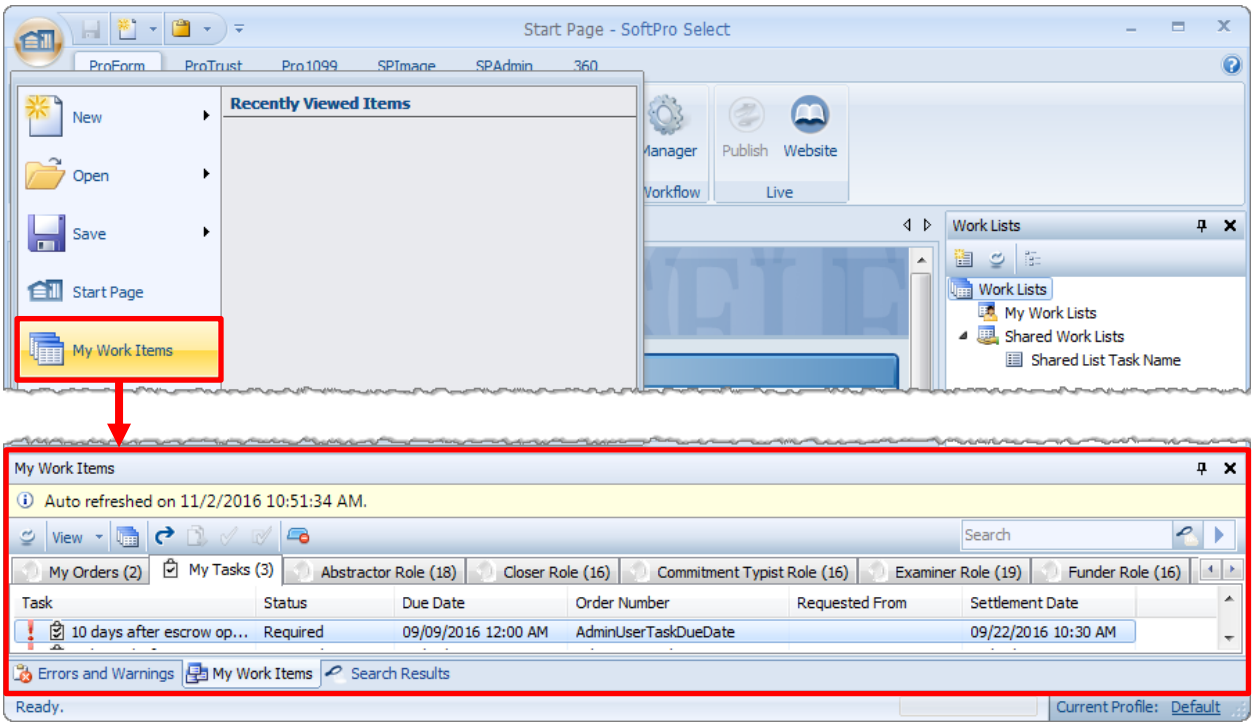

- If you do not see your machine under the **SoftPro Select Services** item in the pane at left, you may need to right click and select a computer to manage.
- After drilling down and selecting a computer in the pane at left, double click the server in the pane at right to view the configuration options.

# 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

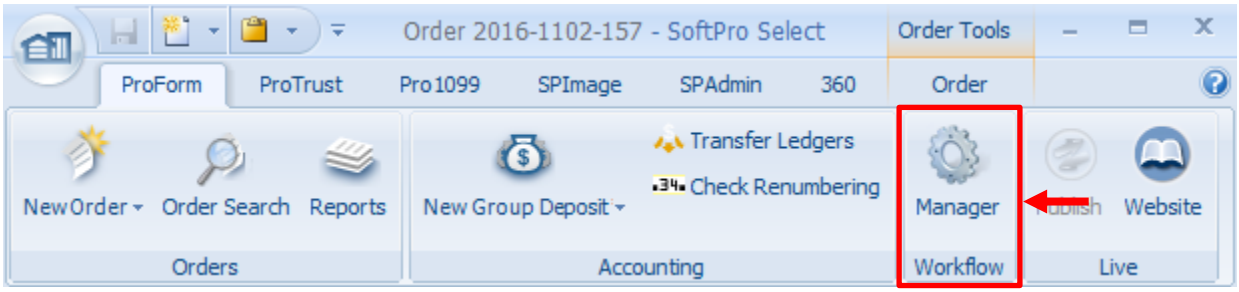
Access **My Work Items** in the panel at the bottom of the screen. You can reopen it through the main menu:




# *Layout Changes*

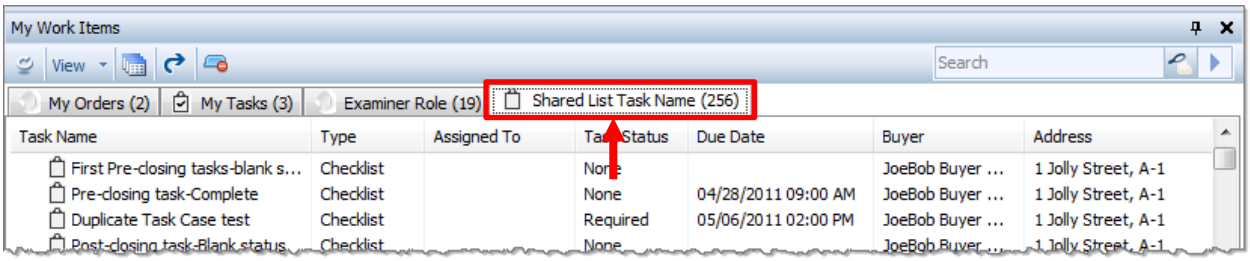
## Workflow Order Manager

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



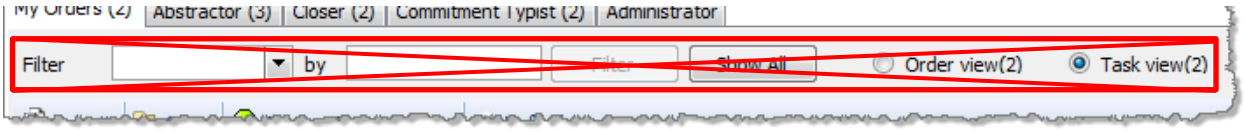
## Work Lists

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




*Filter*

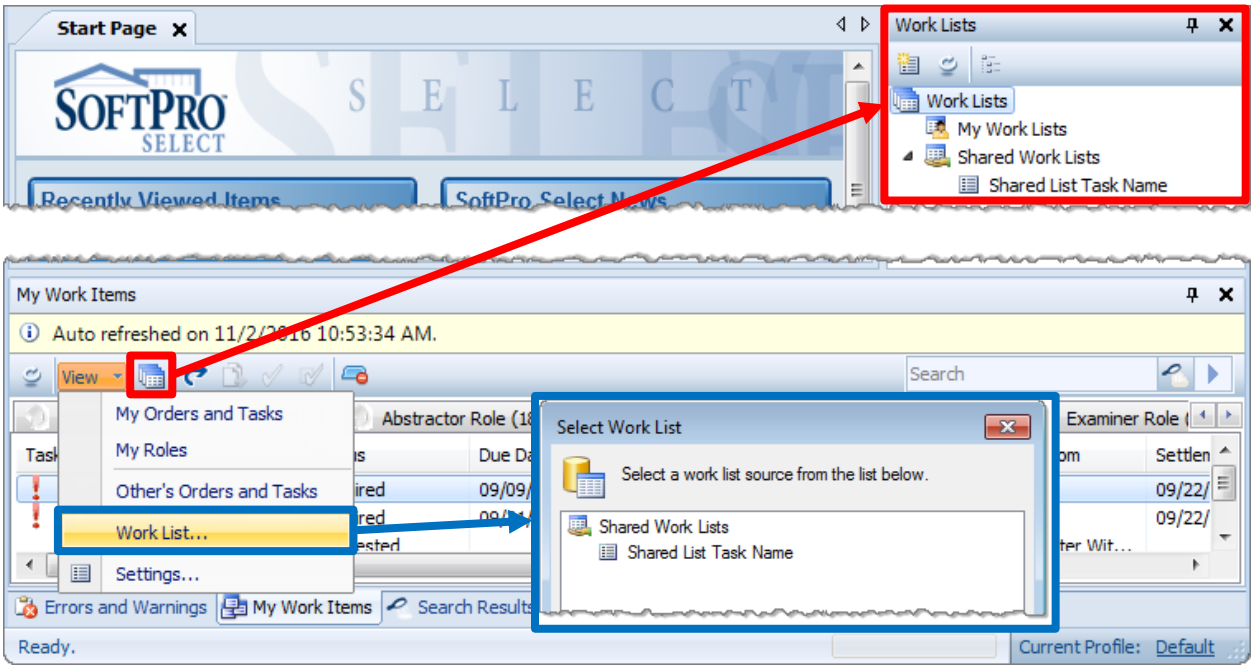
The **Filter was removed** from my work items; the Filter Queue permission was also removed from SPAdmin:




*Accessing*

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

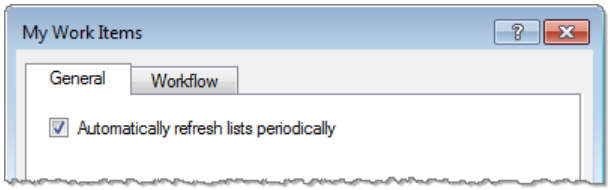
1. You will still **create** Work Lists in the **original location**.
2. You can **view** Work Lists results in this **new panel** OR the **original location**.



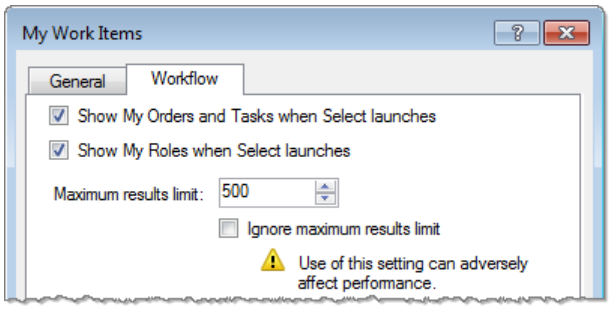
*Toolbar*

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:

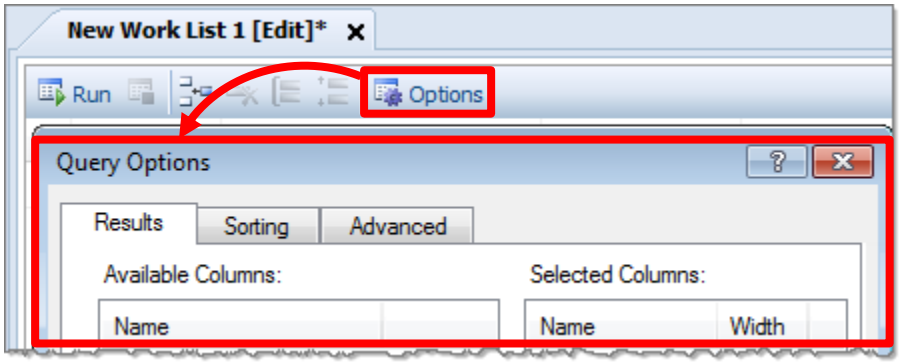
- **Close**: This button will close the tab you are currently viewing.
- **Open/Submit**: Open or submit the item currently selected in the list.
- **Work Lists**: Open the **Work Lists panel** where you may create/view/manage your work lists. This does NOT open the Work Lists tab.
- **View**: This allows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



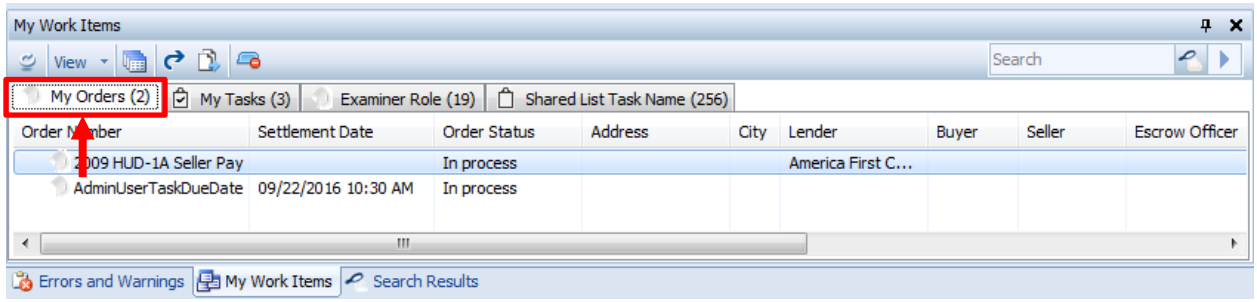

      - You may specify the number of results you receive, or use the checkbox to return all results.
    - **Remember:** Work List settings are located under the **Options** when creating Work Lists:




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

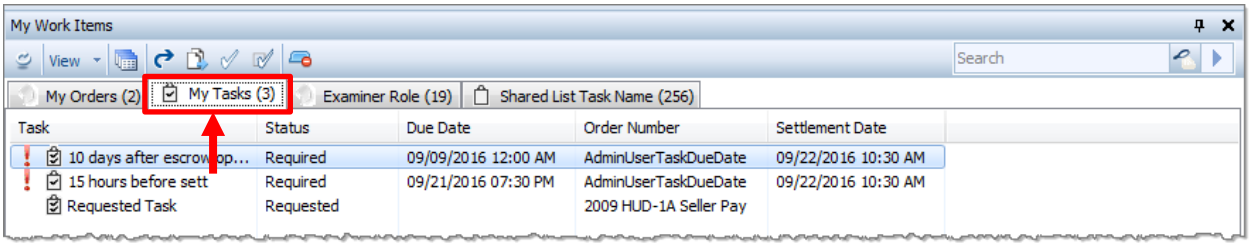
## My Orders

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:



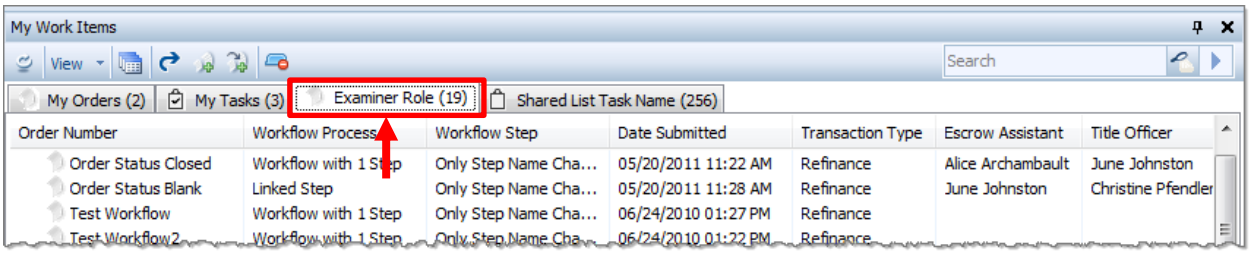

*Toolbar*

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:



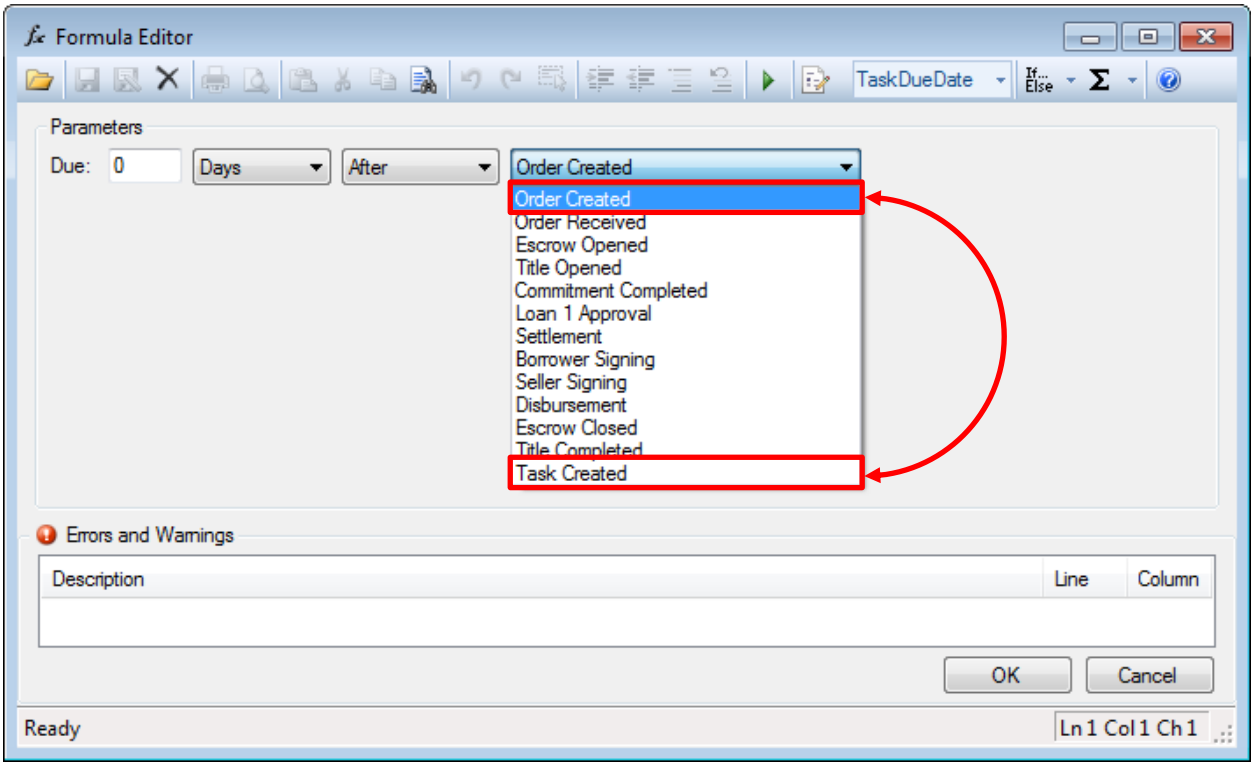

*Toolbar*

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 (12/16/2016)

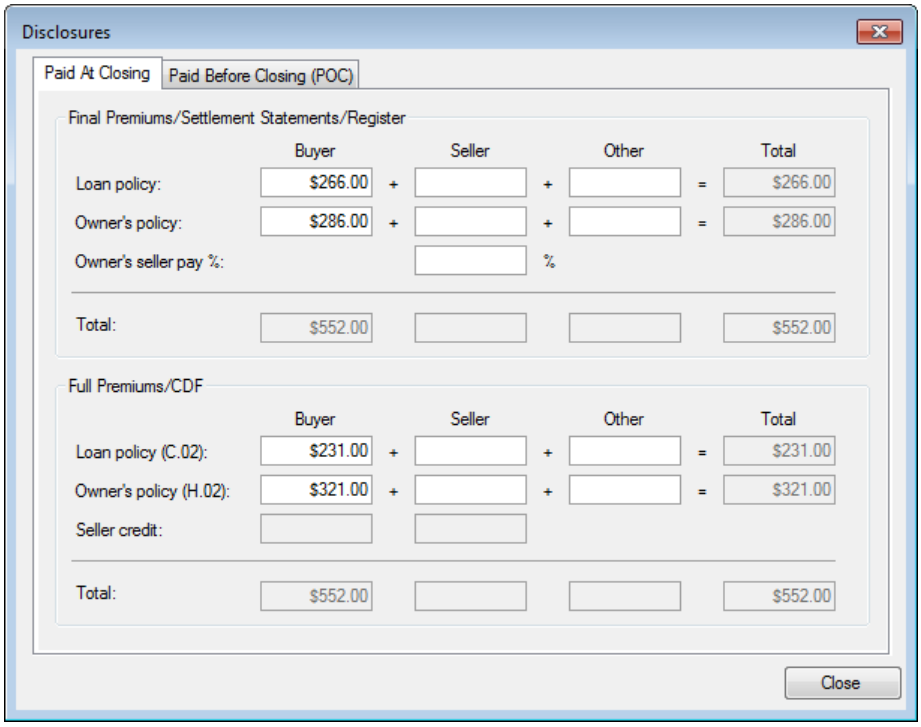
## ProForm

### Title

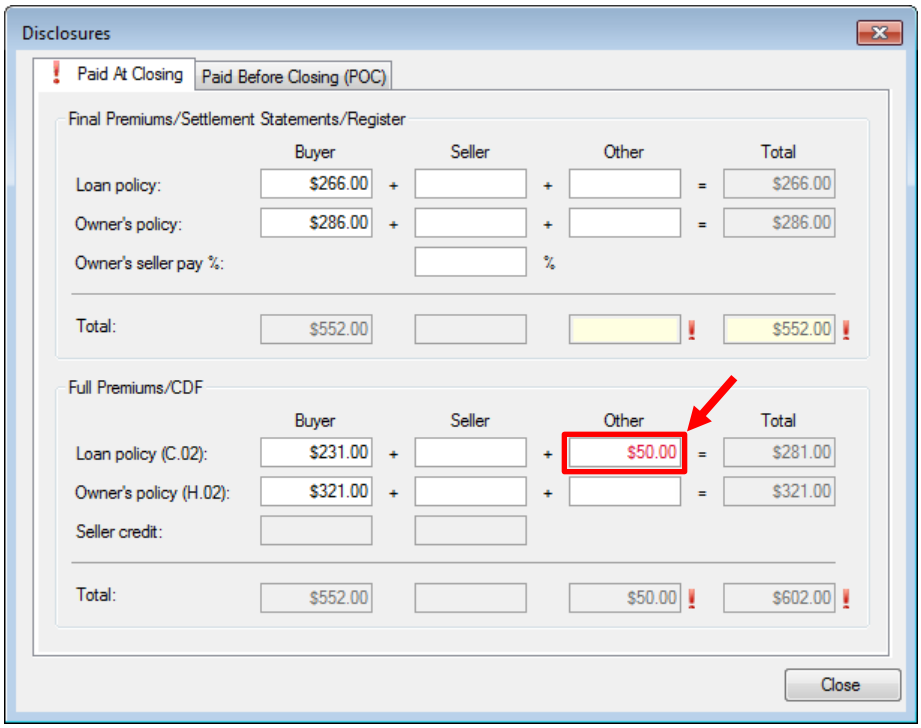
Several changes have been made to title premiums, with a focus on how seller pay amounts are handled on CDF orders. *293534*

*Title Insurance Premiums*

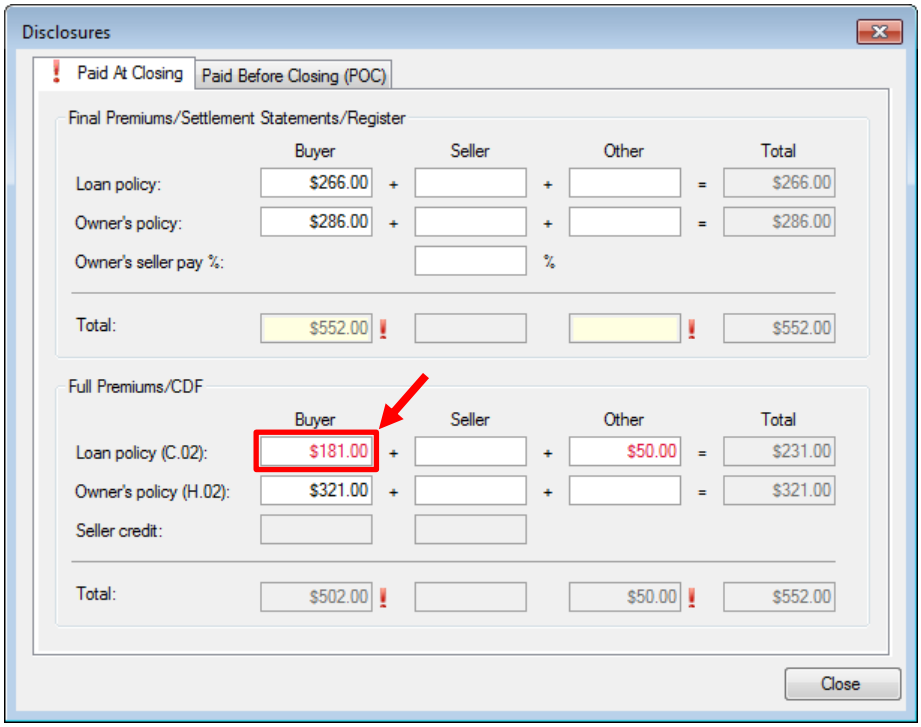
- The **Disclosures dialog** will now auto-calculate and balance the other amount columns when a **Final Premium** amount on the **Paid at Closing** tab is edited.
    - These calculations will not impact amounts on the Paid Before Closing (POC) tab.
- **Example 1**: Money is moved in the full premium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



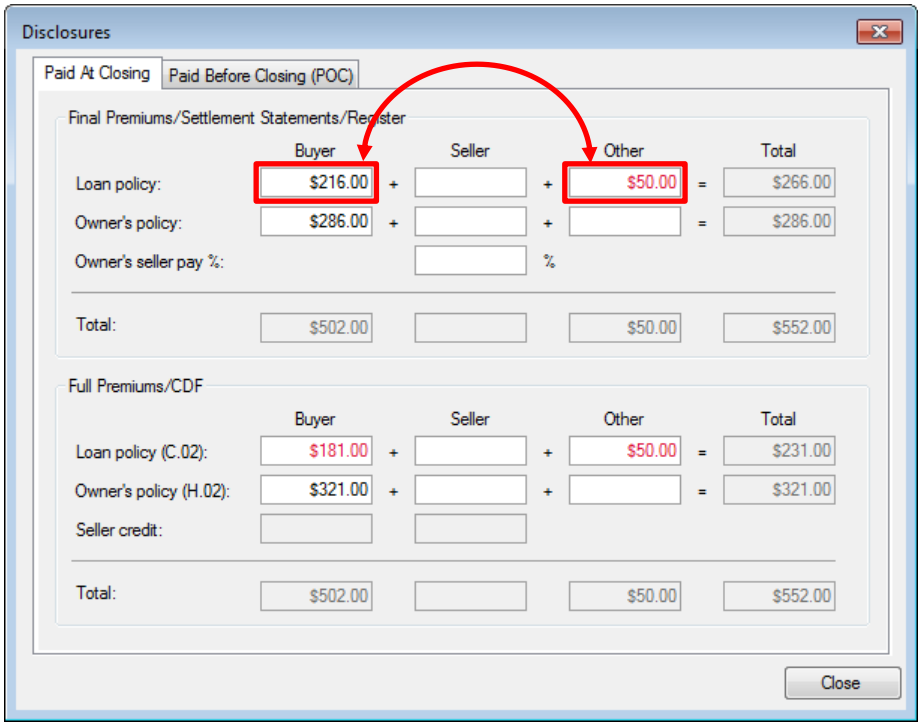

    - $50 of the Loan Policy will be paid by others on the CDF, so the user moves $50 to account for this. Disclosure dialog is now out of balance:



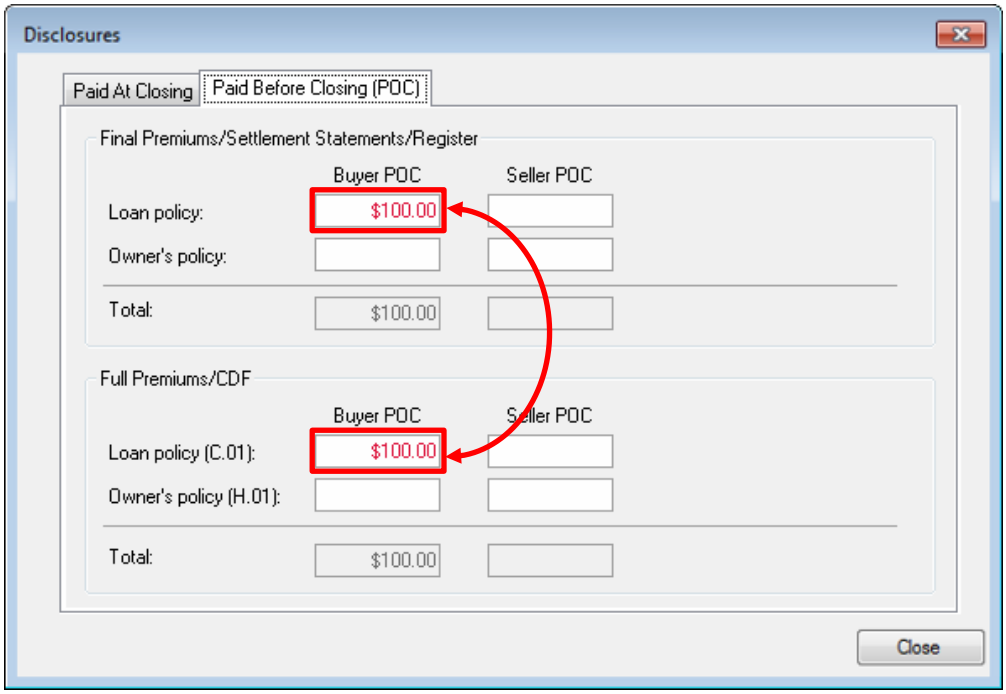

- To correct this, $50 is manually subtracted from the Buyer Full Premium Loan Policy amount. This brings the Full Premium area into balance:



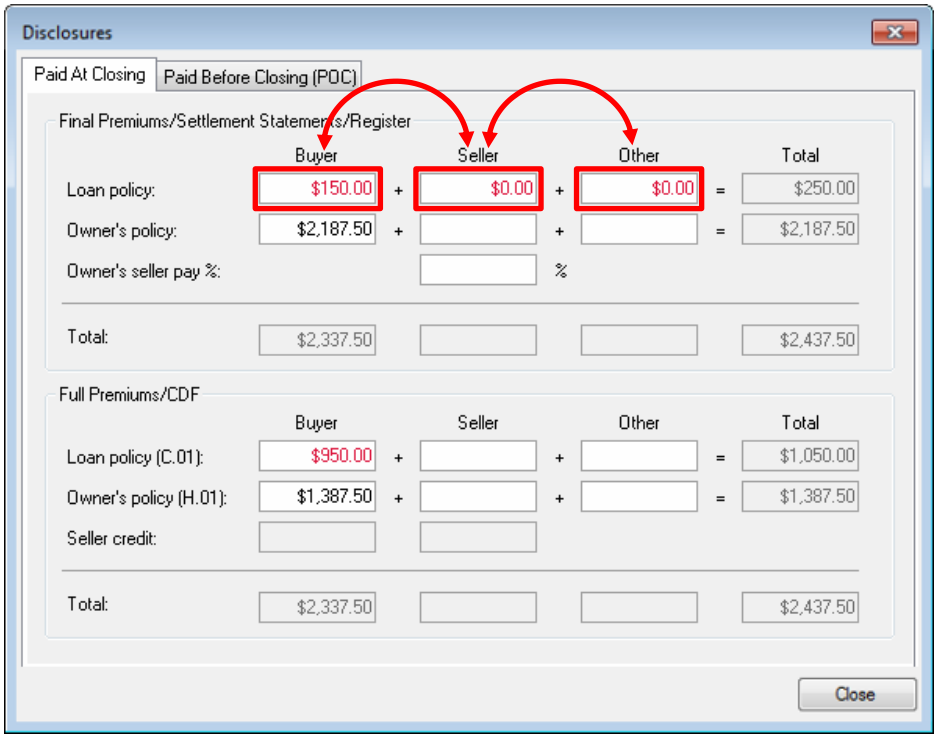
- To balance the Final Premiums, the users only has to input $50 in the Final Premium Loan Policy Other field; the application automatically balances the amount in the Final Premium Loan Policy Buyer field:




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

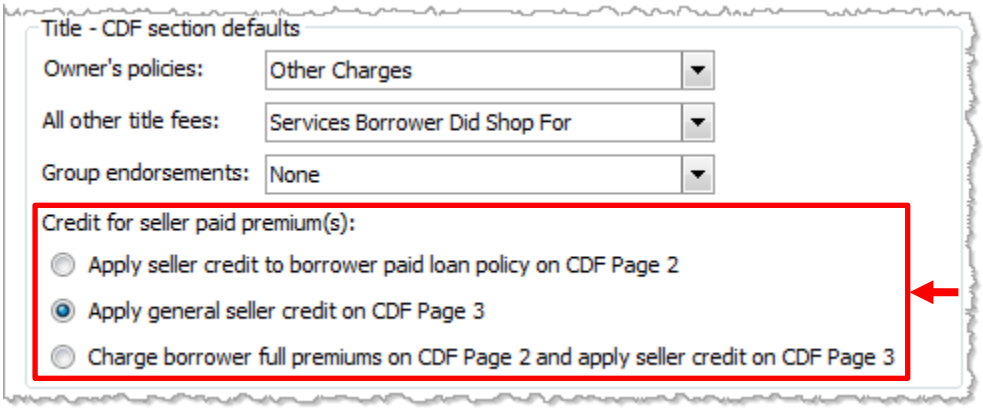


- You must enter the non-POC amounts on **all 3 amount Paid at Closing amount columns**:



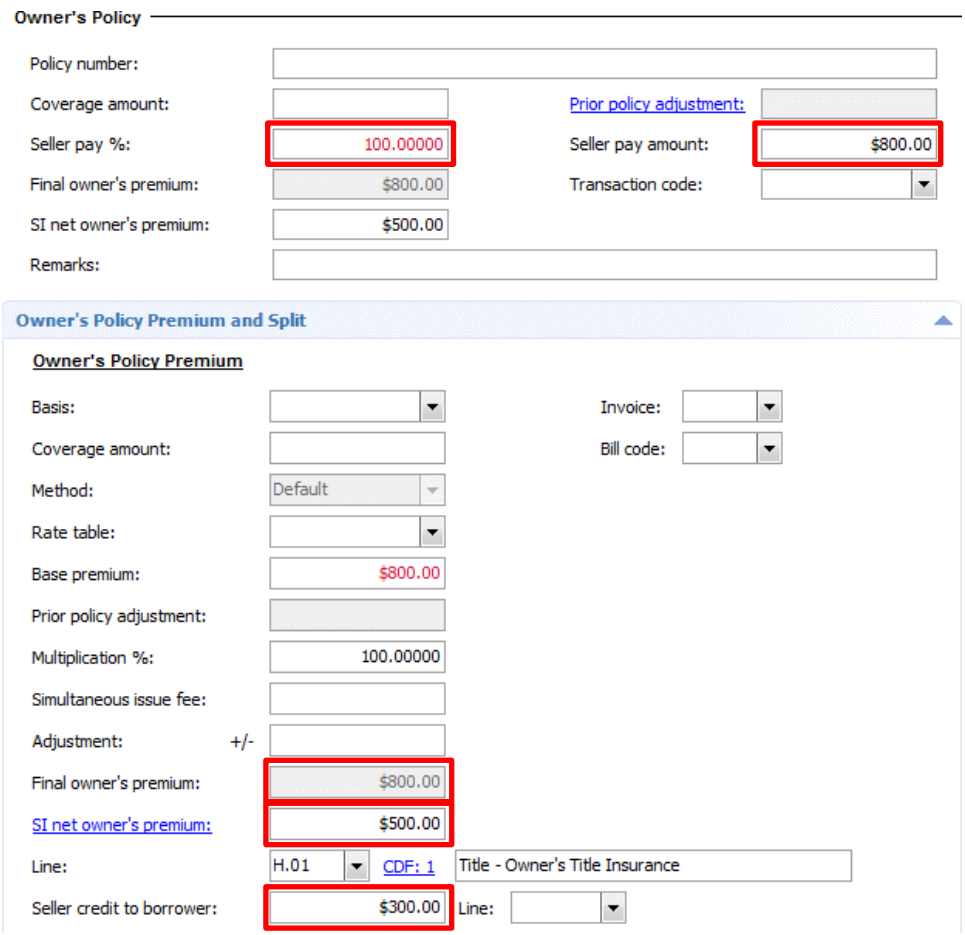

*Options*

- 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:



**Loan Policy**

| | | | |
|---|---|---|---|
| Policy number: | | | |
| Coverage amount: | | Prior policy adjustment: | |
| Seller pay %: | 100.00000 | Seller pay amount: | $100.00 |
| Final loan premium: | $100.00 | Transaction code: | |
| Full loan premium: | $400.00 | | |
| Remarks: | | | |

**Loan Policy Premium and Split**

**Loan Policy Premium**

| | | | |
|---|---|---|---|
| Basis: | | Invoice: | |
| Coverage amount: | | Bill code: | |
| Method: | Default | | |
| Rate table: | | | |
| Base premium: | $100.00 | | |
| Prior policy adjustment: | | | |
| Multiplication %: | 100.00000 | | |
| Simultaneous issue fee: | | | |
| Adjustment: +/- | | | |
| Final loan premium: | $100.00 | Additional Calculations... | |
| Full loan premium rate table: | | | |
| Full loan premium: | $400.00 | | |
| Line: | C.01 | CDF: 1 | Title - Lender's Title Insurance |

- The amounts are balanced correctly in the Disclosures Dialog:

**Disclosures**

Paid At Closing | Paid Before Closing (POC)

Final Premiums/Settlement Statements/Register

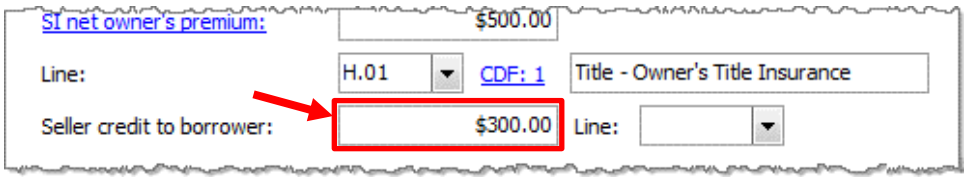
| | Buyer | | Seller | | Other | | Total |
|---|---|---|---|---|---|---|---|
| Loan policy: | | + | $100.00 | + | | = | $100.00 |
| Owner's policy: | | + | $800.00 | + | | = | $800.00 |
| Owner's seller pay %: | | | 100.00000 | % | | | |
| Total: | | | $900.00 | | | | $900.00 |

Full Premiums/CDF

| | Buyer | | Seller | | Other | | Total |
|---|---|---|---|---|---|---|---|
| Loan policy (C.01): | | + | $400.00 | + | | = | $400.00 |
| Owner's policy (H.01): | | + | $500.00 | + | | = | $500.00 |
| Seller credit: | | | | | | | |
| Total: | | | $900.00 | | | | $900.00 |

Close

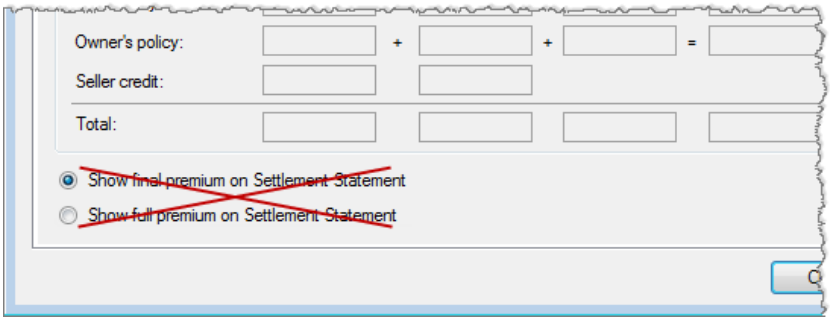
- The **Seller credit to borrower** field under the Owner's Policy calculates to $300. It is only used when the full premium charge to the seller is less than the final premium charge to the seller:



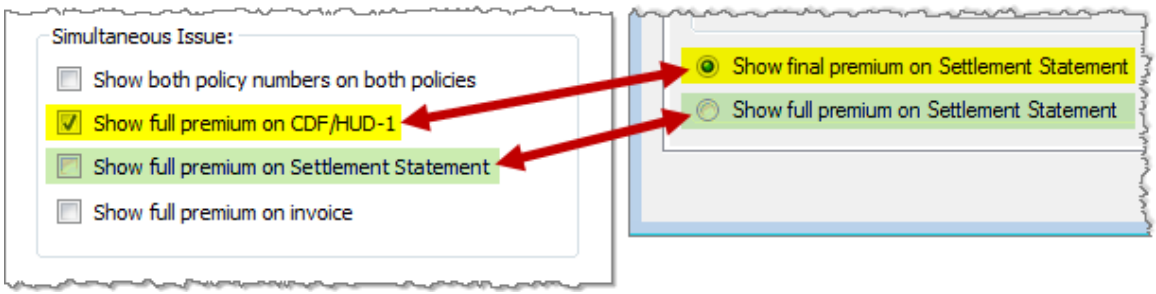

- This applies to the options 1 & 2 discussed above.

*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*

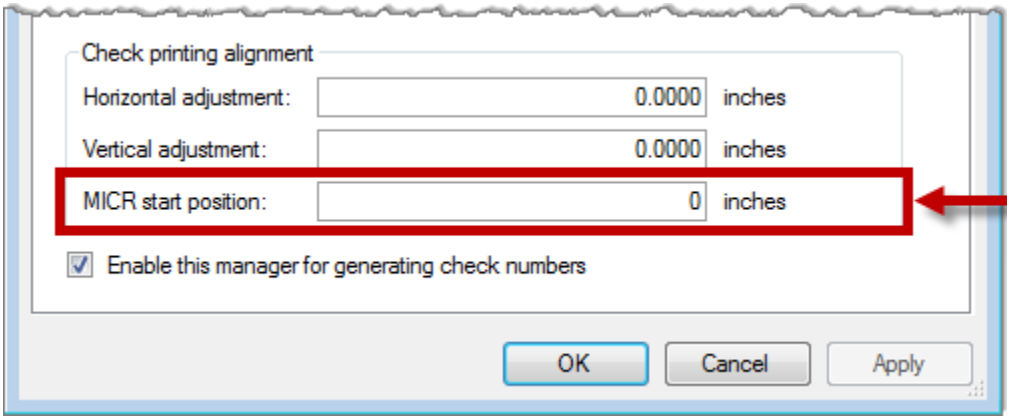
- The search result limit has been set to 500 items for discount & premium rates. *356042, 356041*

*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*

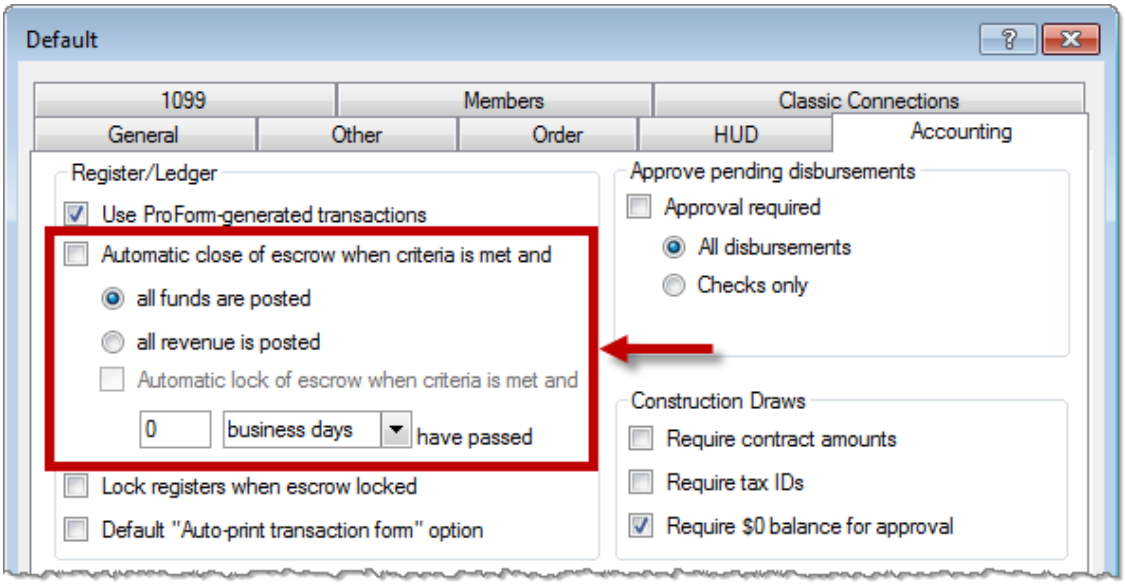



*Policy*

- 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*

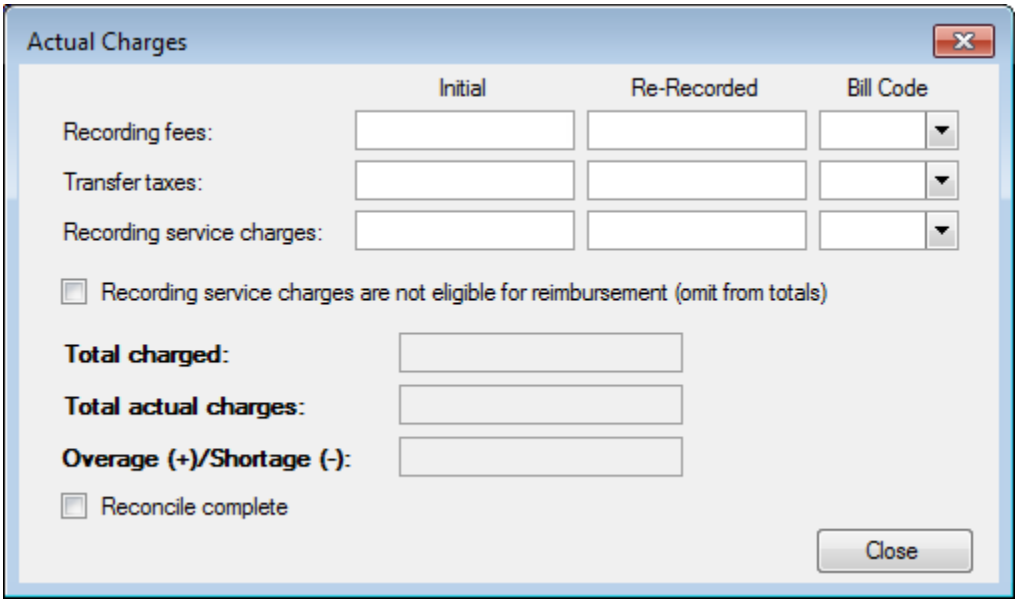
# 4.2.2 (1/27/2017)

## ProForm

### Escrow/Closing

*Actual Charges Dialog*

To help users reconcile the actual recording/transfer tax fees charged by a vendor against the fees charged to the buyer/seller at closing, an **Actual Charges dialog** was added to CDF Section E & HUD Section 1200. Two new reports were also added to assist in identifying orders that have overages or shortages and need to be reconciled: *356928*



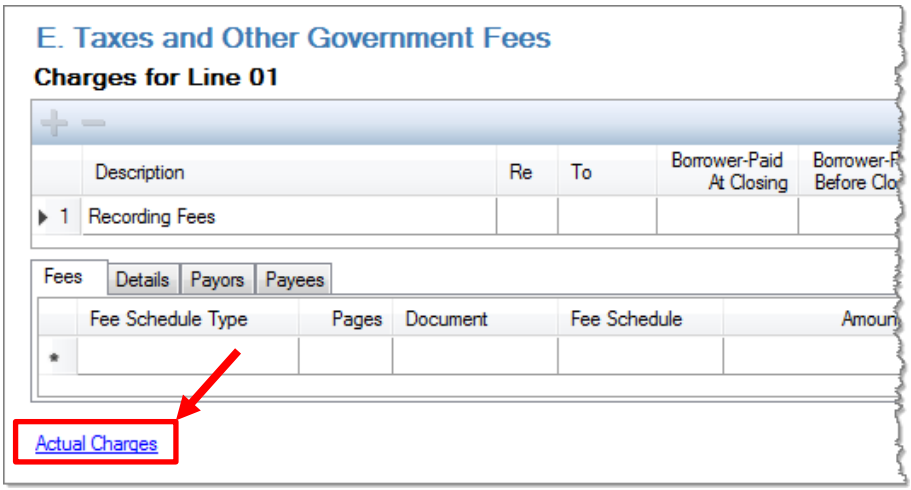

**Dialog details**:

- **Recording fees**, **Transfer taxes** (**Initial**, **Re-Recorded):** These fields are for the fees coming from the vendor for recording fees and transfer taxes.
- **Recording service charges:** This line is intended to be used for service charge fees coming from the vendor, such as eRecording fees.
    - **Recording service charges are not eligible for reimbursement (omit from totals)**: This checkbox is associated with the Recording service charges fields.
    - If you are not being reimbursed for the service charges, check this box; this will indicate that the service charge amount won't be included in the total actual charges and won't be counted towards overages/shortages.
- **Bill Code**: This information is populated from the bill code drop-down in SPAdmin; select the appropriate code for the charge.

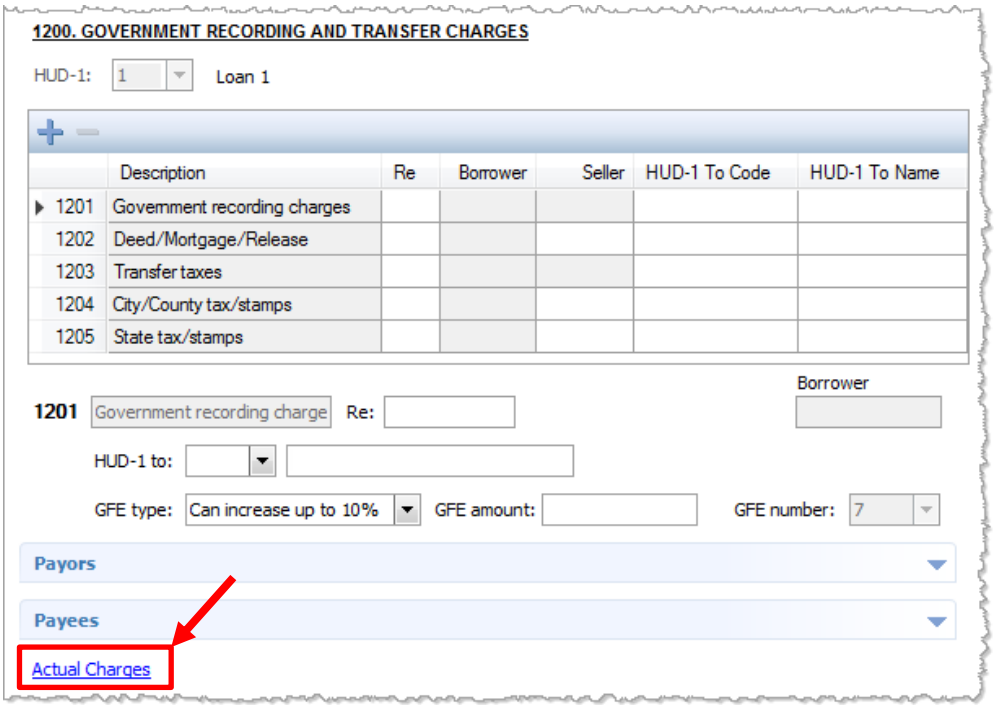
- **Total Charged**: This is the sum of all charges from the HUD 1200 Section or from CDF Section E, including POC amounts.
- **Total actual charges**: This is the sum of all actual charges, excluding **service charges not eligible for reimbursement**.
- **Overage (+)/Shortage (-)**: The difference between **Total charged** and the **Total actual charges**.
- **Reconcile complete**: After running the new reports and identifying/resolving overages and shortages, using this checkbox will remove from the reports. If you want to include orders that have been reconciled on your reports, you can select to Include **Reconcile complete orders**.

**Accessing**: The dialog may be accessed from either CDF or HUD files:

- **CDF Section E**: A hyperlink has been added to the charge details dialog:

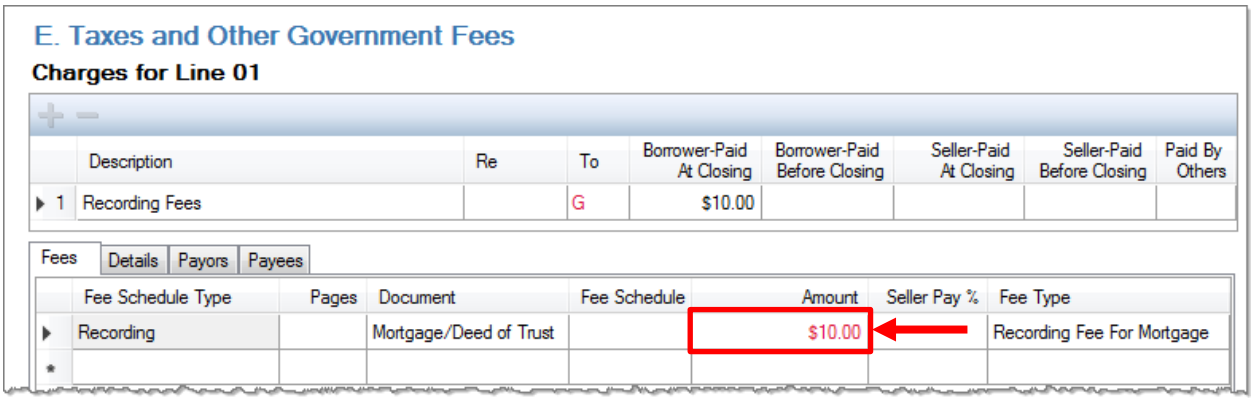



- **HUD Section 1200**: A hyperlink has been added to the charge details:

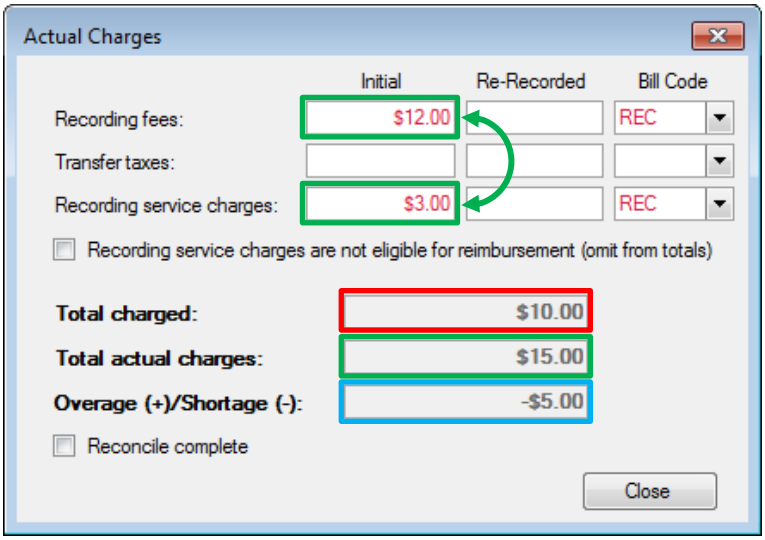



**Example:**

1. A **Recording fee** of **$10** has been input into **CDF Section E** and charged to the Borrower:

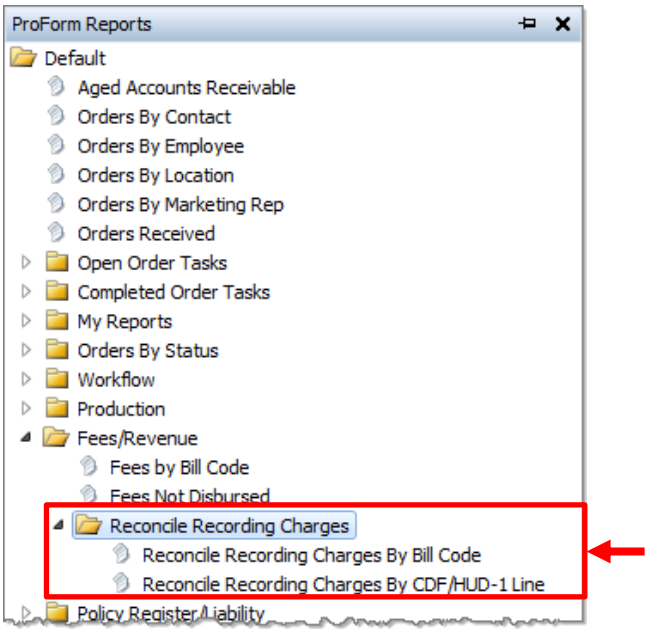



2. **However**, the **actual recording fee** was **$12**, & the **recording service charge** was **$3**. This is input in the Actual Charges dialog:

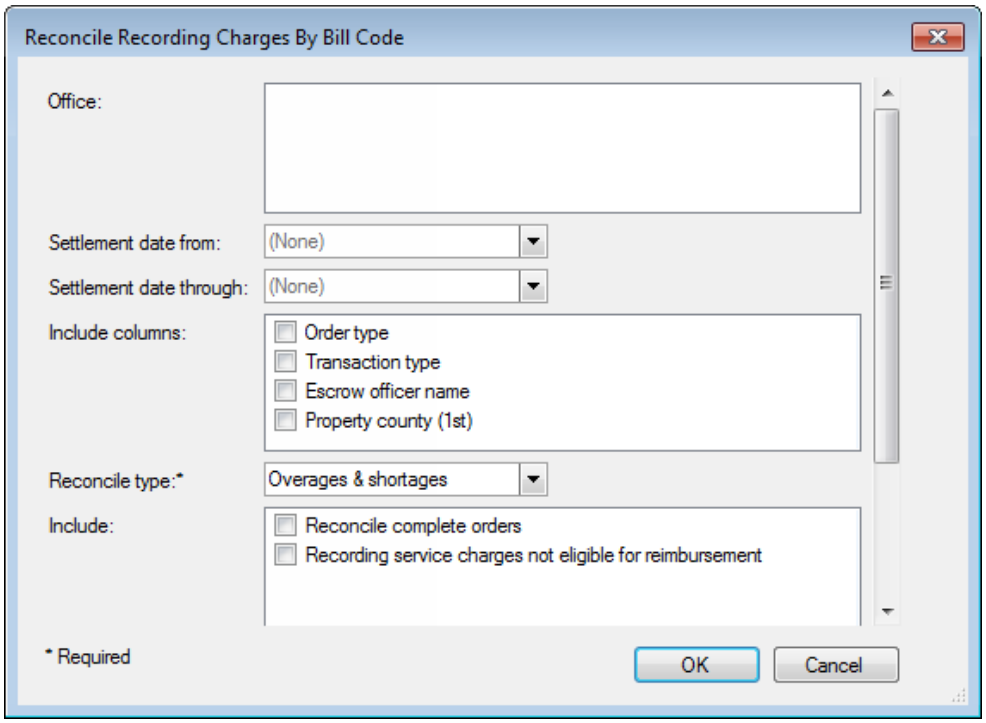



3. The difference between the **Total charged** (CDF data) and the **Total Actual charges** (data input into the dialog) results in a **$5 shortage**.
4. Read the report section below to see how the new reports would work with this data.

**Reports**: A folder containing two new reports has been added to the ProForm Reports tree. The example above will help to demonstrate how these reports work:

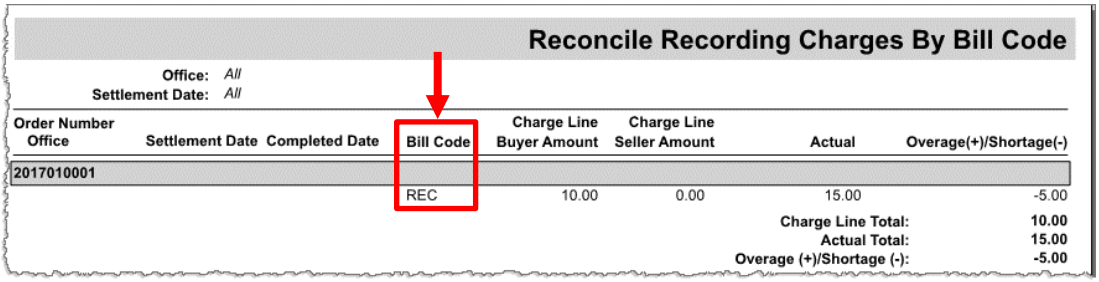



- **Reconcile Recording Charges By Bill Code**:
  - **Double click** the report to load.
  - **Parameters**: Specify the type of information you pull into the report:




- **Offices**: Displays office information, if available. Select one or more offices to run the report against.
- **Dates**: Specify a date range for the report, if desired.
- **Include**: You may opt to include Order Type, Transaction Type, Escrow officer name, or Property county (1st) if you wish.
- **Reconciliation type**: Required; this field will allow you to pull the following information:
  - **Overages & Shortages**, **Overages Only**, **Shortages Only**, or **All orders including 'in balance' orders**.
- **Include**: Optional; you may include **orders marked as reconcile complete**, or orders with **service charges marked as not eligible for reimbursement**.

- The **Reconcile Recording Charges By Bill Code** report looks like this:

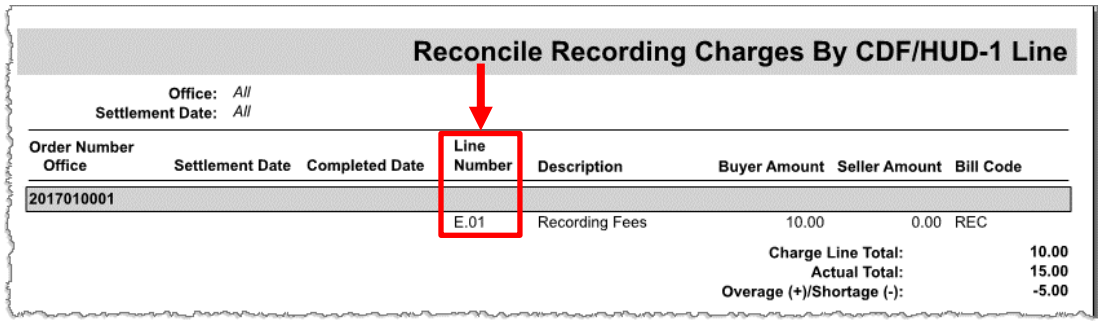


**Reconcile Recording Charges By Bill Code**

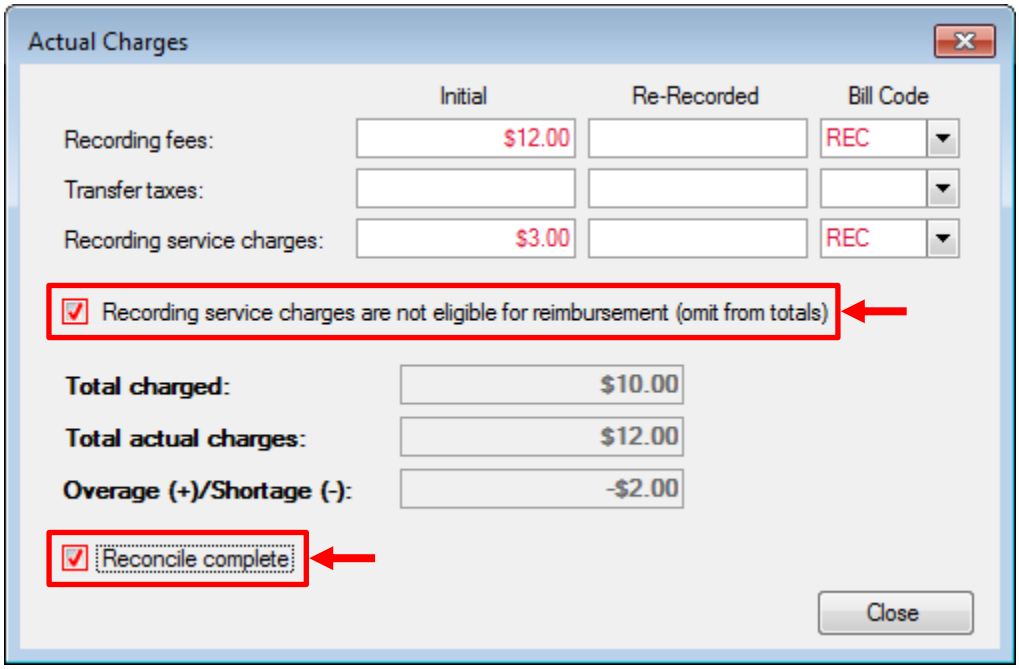
Office: *All*
Settlement Date: *All*

| Order Number / Office | Settlement Date | Completed Date | Bill Code | Charge Line Buyer Amount | Charge Line Seller Amount | Actual | Overage(+)/Shortage(-) |
|---|---|---|---|---|---|---|---|
| 2017010001 | | | | | | | |
| | | | REC | 10.00 | 0.00 | 15.00 | -5.00 |
| | | | | | | Charge Line Total: | 10.00 |
| | | | | | | Actual Total: | 15.00 |
| | | | | | | Overage (+)/Shortage (-): | -5.00 |

- **Reconcile Recording Charges By CDF/HUD-1 Line**:
  - This report work just like the charges by Bill Code report above, except that it displays the information according to CDF/HUD-1 line and the actual amount is shown only under Actual Total; it looks like this:



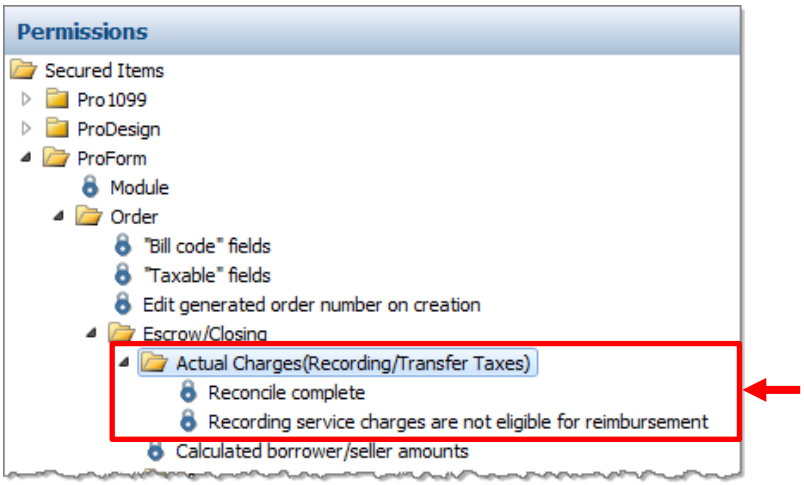

- After reviewing the overages/shortages in the reports, you may go back to the corresponding orders to pull up the Actual Charges dialogs & check the following checkboxes:




  - **Recording service charges are not eligible…**: Check this if you will be assuming the payment of the service charge ($3 here).
  - **Reconcile complete**: Marks the charges as reconciled, & excludes from the reports once you make any accounting adjustments or update the CDF/HUD-1 to collect the fee. Edits to this field will write to the order history.

**Permissions**:

- A folder has been added under **Escrow/Closing > Actual Charges (Recording/Transfer Taxes):**




- **Recording service charges are not eligible for reimbursement**: If the **edit** permission is granted, the user can edit the **Recording service charges are not eligible** checkbox field on the **Actual charges** dialog.
- **Reconcile complete**: If the **edit** permission is granted, the user can use the **reconcile complete** checkbox on the **Actual charges** dialog.
- These groups have edit rights granted with new installs & upgrades: **Administrators**, **Default**, **EscrowAssistant**, **EscrowOfficer**, & **Manager**.

## Order

- All contact types will now be available in the **Earnest Money Deposit Retained By** field for HUD 2009, HUD 1986, & CDF order types. *328064*
- General order performance improvements were made. *358919*

## Documents

- The seller's name was missing from the Substitute 1099-S Form when the order Settlement Date was set in the future. *359896*

# *API*

## SPAdmin

*Document & Report Tree Managers*

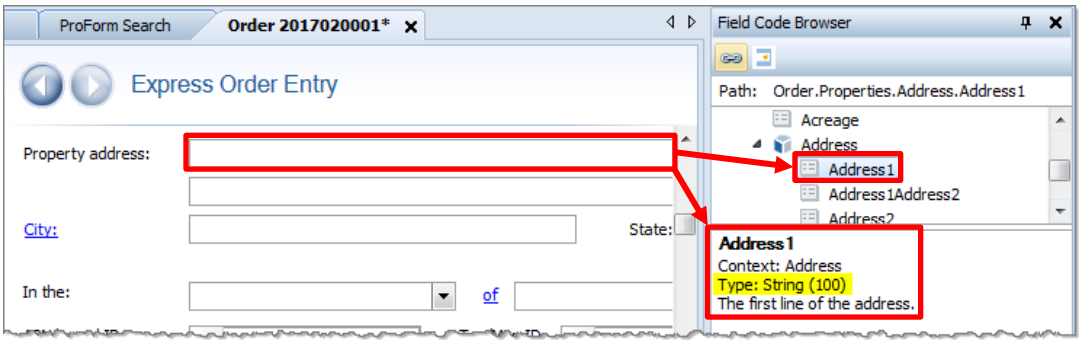
- The application now provides programmatic access to the selected document object within the document and report tree managers. *360090*

# 4.2.3 (3/17/2017)

## ProForm

### General

The length of **String fields** now displays in the field code browser. *357851*



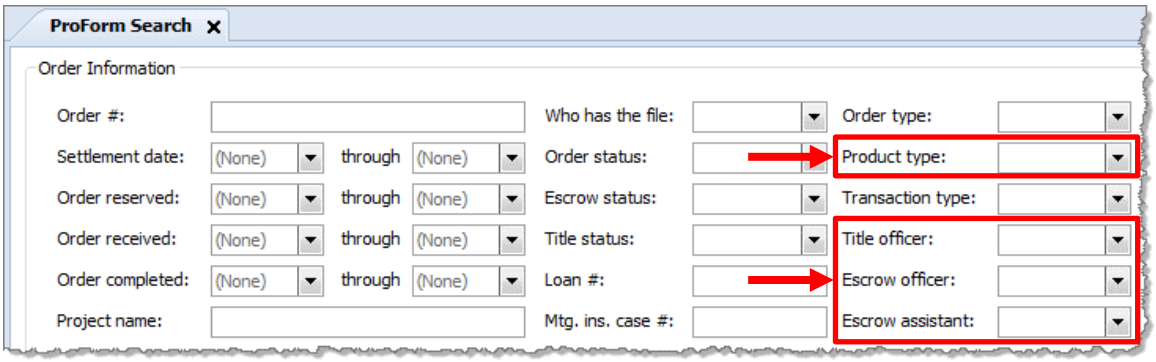

*Order Numbering*

- Orders can no longer be renamed after revenue transactions have been posted. *362807*
- Four new—**optional**—fields have been added to display helpful information at the top of every screen within an order. *291774*

  - Three of these fields are invisible, but they may be made visible with scripting. These fields can display any field from within the order.
  - The fourth field will display whether an order has come from RealEC. If the order is not from RealEC, this text will not display. This fourth field can also be customized to show another field from the order if preferred.

### Search

- Users may now search by **Title officer/Examiner**, **Escrow officer/Closer**, and **Escrow assistant/Pre-closer**, as well as search by **Product Type**. *7858, 8930*



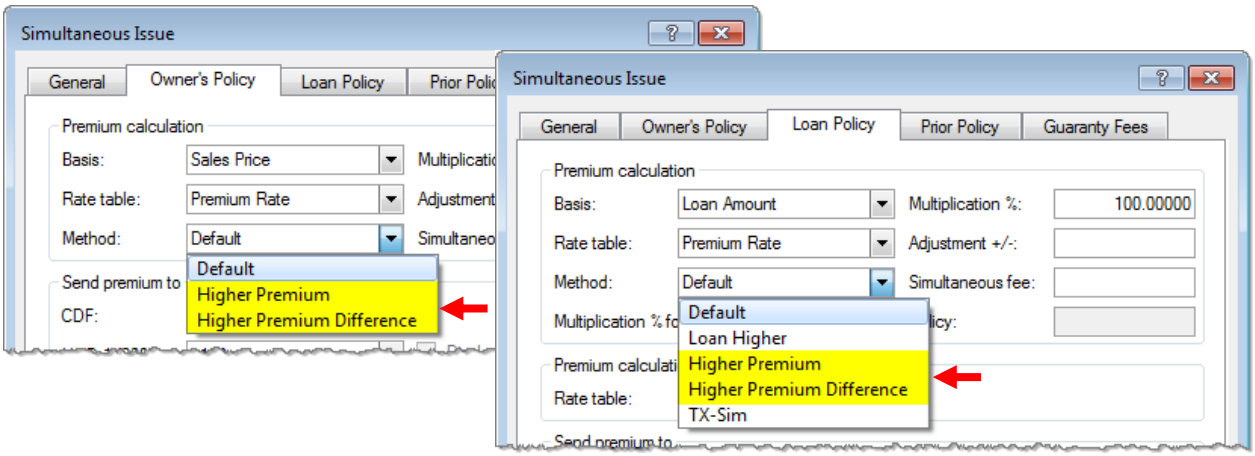
## Title

Several changes have been made to Title Premium calculations. *348422, 266708*

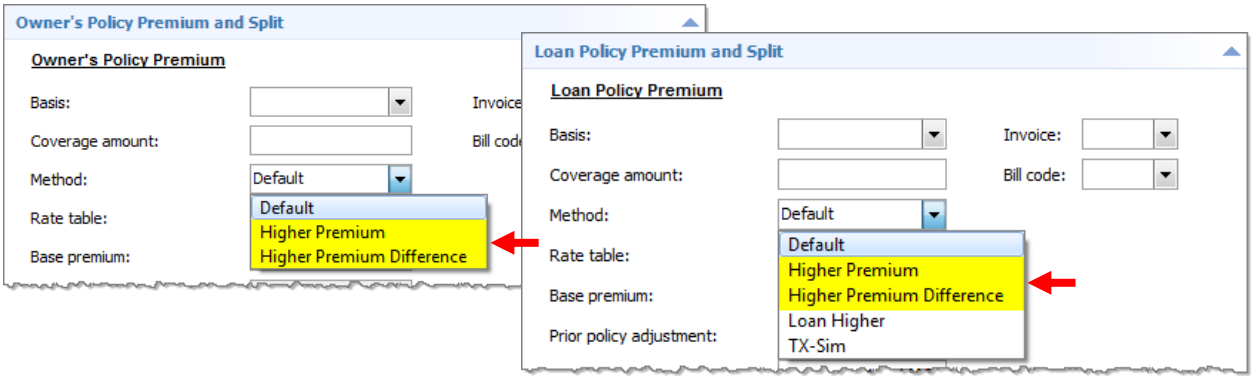
*Premium Calculation Methods*

**Two new methods** have been added for calculating the **Owner** and **Loan** Policy Premiums for simultaneous policies:

**SPAdmin Policy Manager:**




**Title Insurance Premiums Screen:**



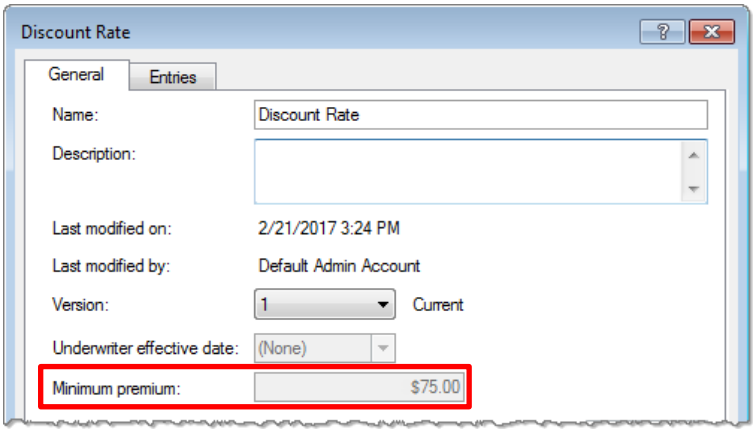

- **Higher Premium**: This calculation method will compare the Loan Policy premium to the Owner's Policy premium.
  - The recommended use is to set both Loan and Owner's policies methods to Higher Premium if you need to calculate only the higher premium when the policy is simultaneous issue.
  - If the Loan Policy is higher, then only a loan premium charge will apply; a $0 charge will apply for the Owner's Policy.

  - If the Owner's Policy is higher, then only an Owner's Premium charge will apply; a $0 charge will apply for the Loan Policy.
- **Higher Premium Difference**: this calculation will compare the Loan Policy base premium to the Owner's Policy base premium.
  - The recommended use is to set the Loan Policy method to Higher Premium Difference if you need to calculate the Loan Policy Premium to the difference between the loan and owner's premiums when the loan premium is higher on a simultaneous issue.
  - If the Owner's Policy is higher, then the charge will only include the Owner's premium; a $0 charge will apply for the Loan Policy.

*Discount Rate Minimum Premium*

With prior policies, the application will now:

1. Look at the **minimum premium** shown in the **discount rate table**:




2. Look at the **rate table minimum premium** and if the policy has a discount applied, use the discount table minimum premium.

## Templates and Overlay

*Overlay*

- The **Address2** & **Seller SSN/TIN** fields were creating errors when overlaying PFD files from SoftPro Standard or Enterprise Editions. *309635, 363060*

## Order

*Endorsements*

When custom fields were used in endorsements, and those endorsements were included with a sent and locked invoice, the custom fields were incorrectly being locked as well; resolved. *286901*

*Additional Title Charges*

After sorting information in the grid using one of the row headings (i.e. – Description, Charge, etc.), the data displayed beneath the grid was not reflecting the row selected in the grid. *77807*

*Loan*

- **Loan Terms & Payments**:
  - An error was occurring when the **Payment frequency** was set to **Annually**, **Loan term** was set as **1**, and Total payments was set to **1**. *283839*

*Documents*

- **Prompts**:
  - Document prompts weren't displaying the object associated with the context of a custom field. *354077*
- **Selection Screen**:
  - The **Ctrl** and **Shift** keys were not working to select multiple documents in the ReadyDocs pane. *255980*
- **Document & Report Trees**:
  - The application will now hide HUD folders in the default documents tree when the order type is not HUD-1, and it will the default CDF folders in when the order type is not CDF. *362041, 362042*

*Attachments*

- Order attachments were not keeping their new names after users attempted to rename. *370020*
- An error was occurring when clicking on Order Attachments: **Failed to load screen 'SPAttachments'. Please contact your system administrator**. *373352*

# ProTrust

## Reports

*Daily / Transaction Activity*

- The reference number for the last processed transaction did not display correctly except for checks; resolved. *279653*

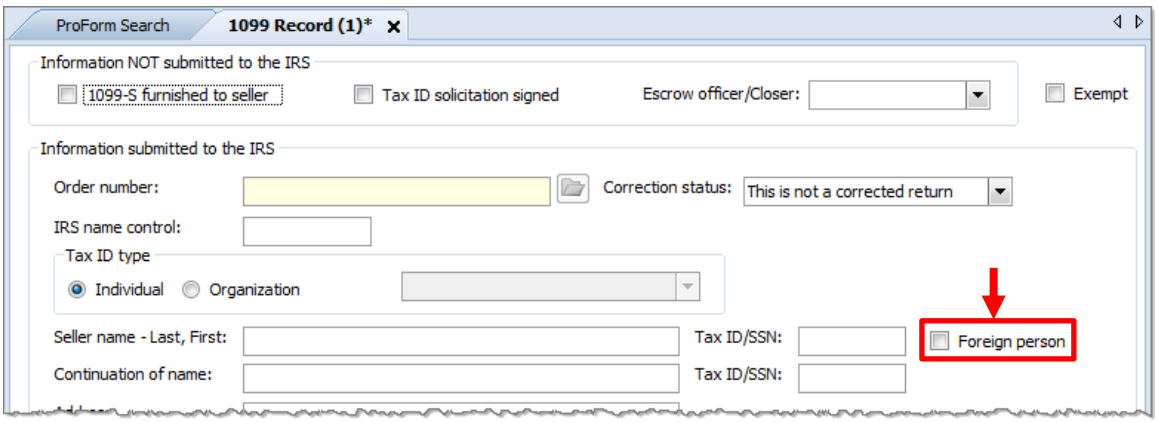
## Reconciliation

- On the Reconciliation screen, zero dollar ($0.00 ) amount group deposits were appearing; resolved. *339924*

# Pro1099

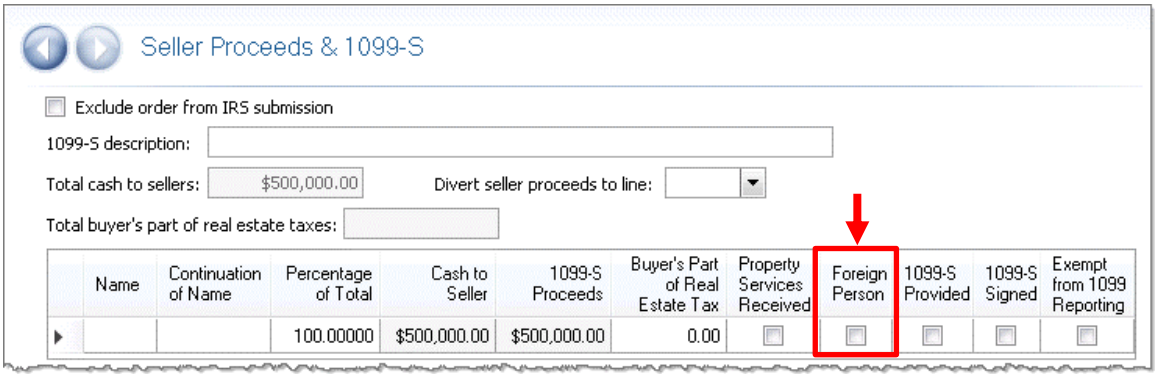
## Record

- The Pro1099 record's profile path was not automatically updated when the Order's ownership profile was manually changed; resolved. *354275*
- A new **Foreign person** checkbox has been added. This checkbox is used to specify that the transferor is a foreign person. This would include nonresident alien, foreign partnership, foreign estate, or foreign trust. *362943*



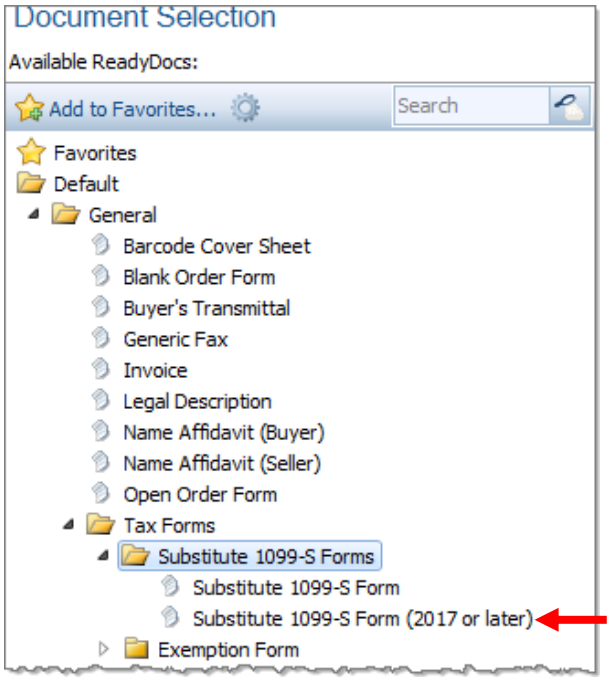

## Seller Proceeds (1099-S)

- A new field has been added to specify a seller as being a foreign person or entity. *362942*

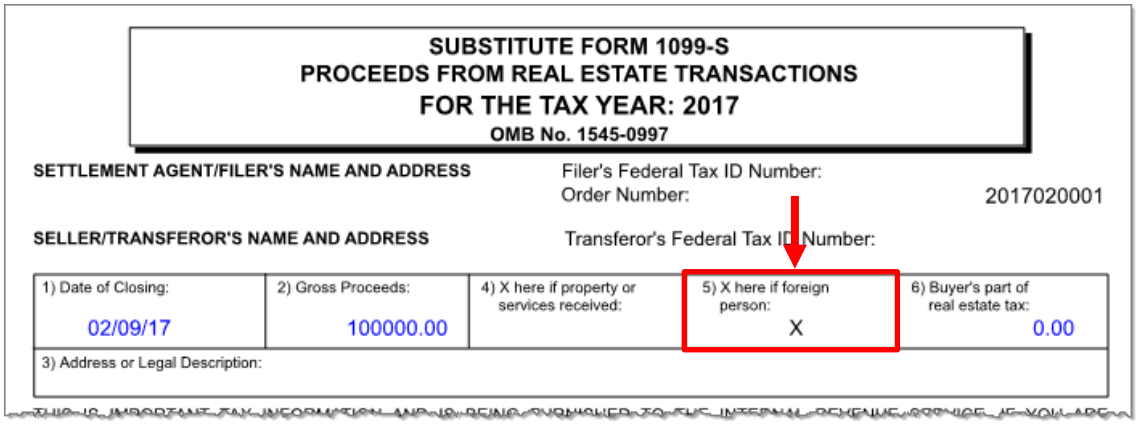



*Documents & Reports*

- The **Substitute 1099-S Report** and the **ProForm Substitute 1099-S ReadyDoc** were modified to incorporate the new **foreign person** field. *363546, 363543, 362642*
  - For settlements **prior** to 2017, continue to use the older **Substitute 1099-S Form**.
  - Here's the location of the modified form in the ReadyDoc tree:




- Here is how the **foreign person** will appear on the rendered 1099-S:

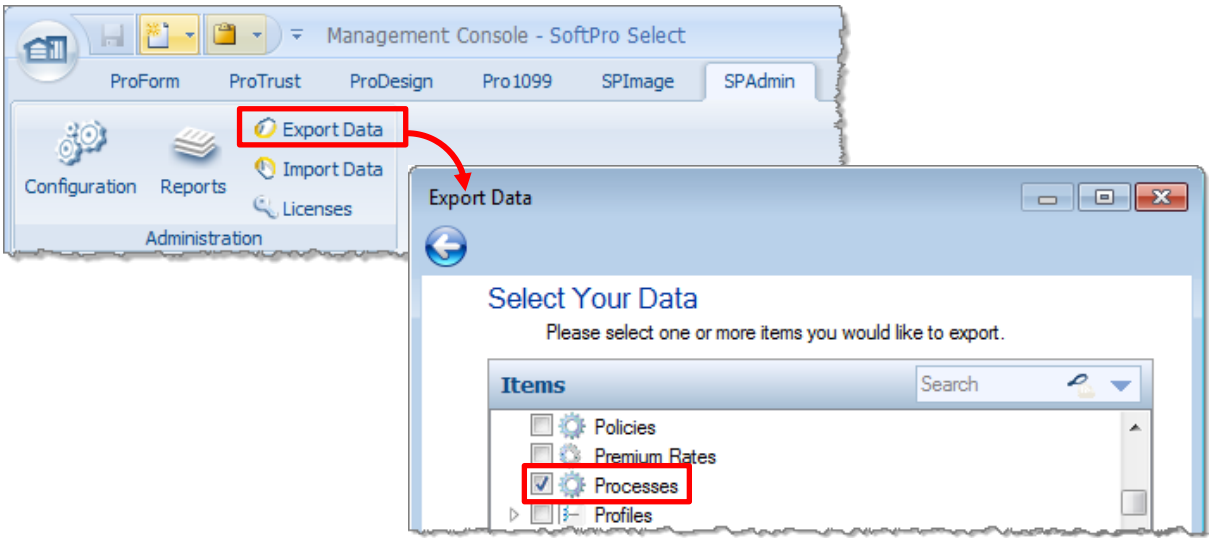



## SPAdmin

### Tools

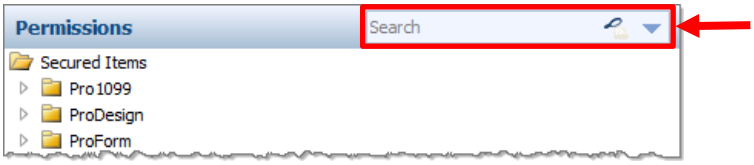
*Export/Import*

The Export/Import options now handle automation processes. The data will be transferred in the form of an **.spx** file: *361592, 356513*




## Permissions

A search option has been added to the permissions tree. *4403*

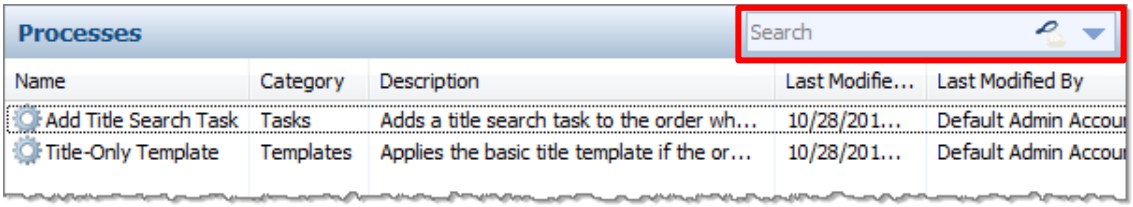



## Check Printing

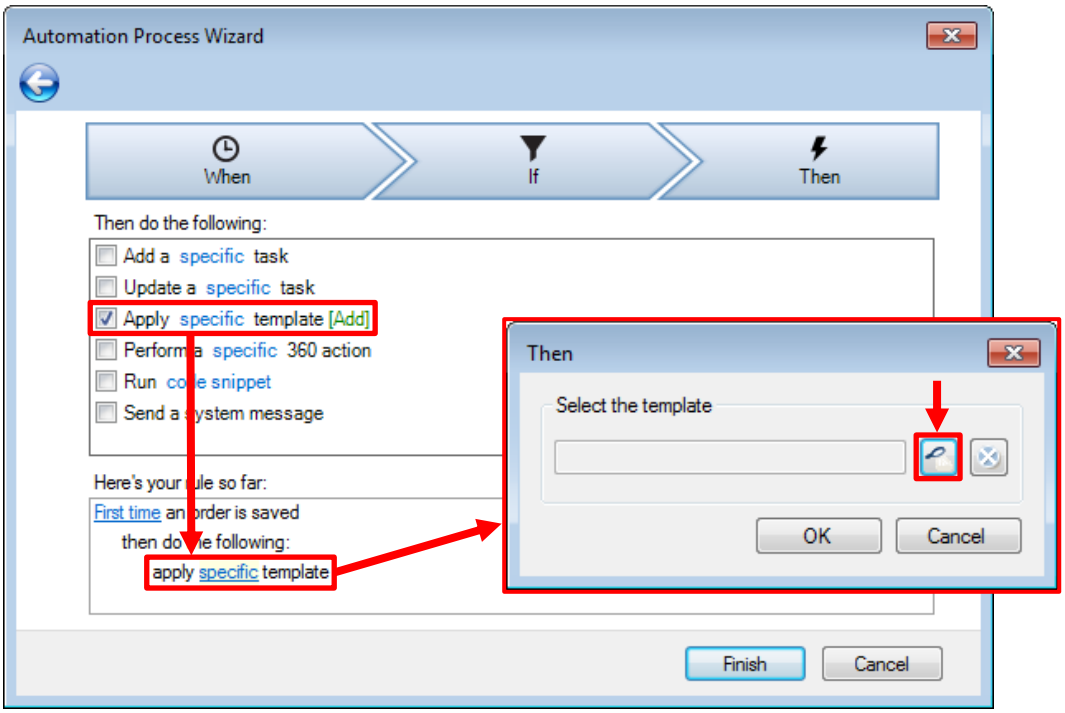
The check printing manager description field was increased to 200 characters. *327963*

## Automation

- The search bar now searches the **Category** & **Description** columns. *353218*

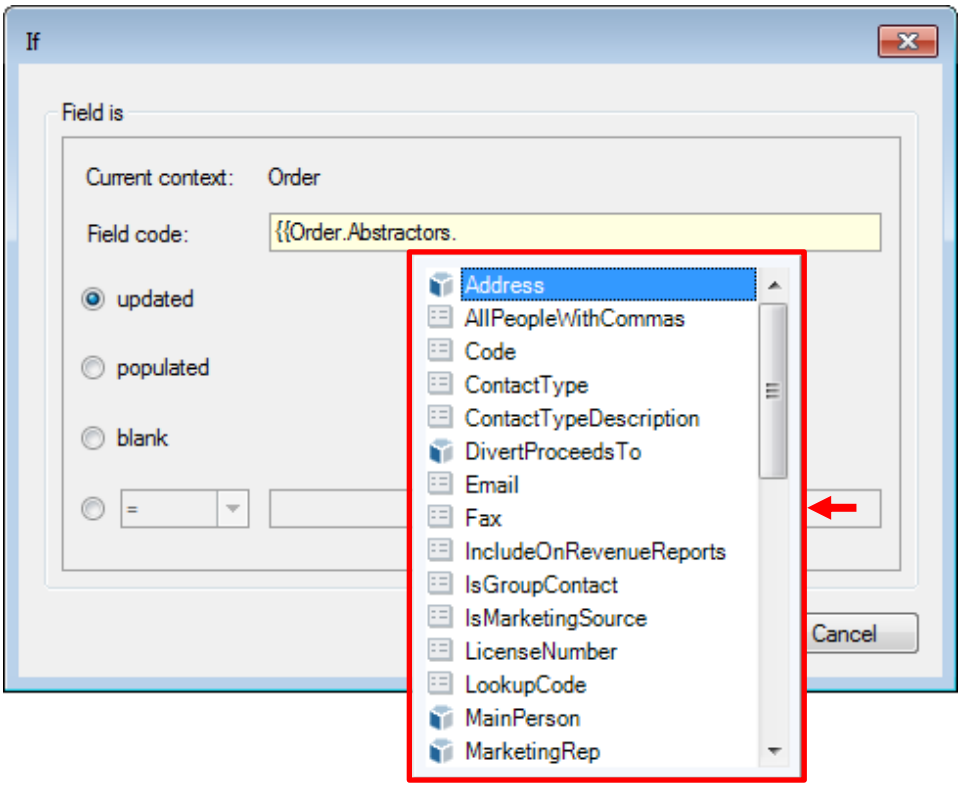



- An option has been added to allows users to search for templates. *361340*



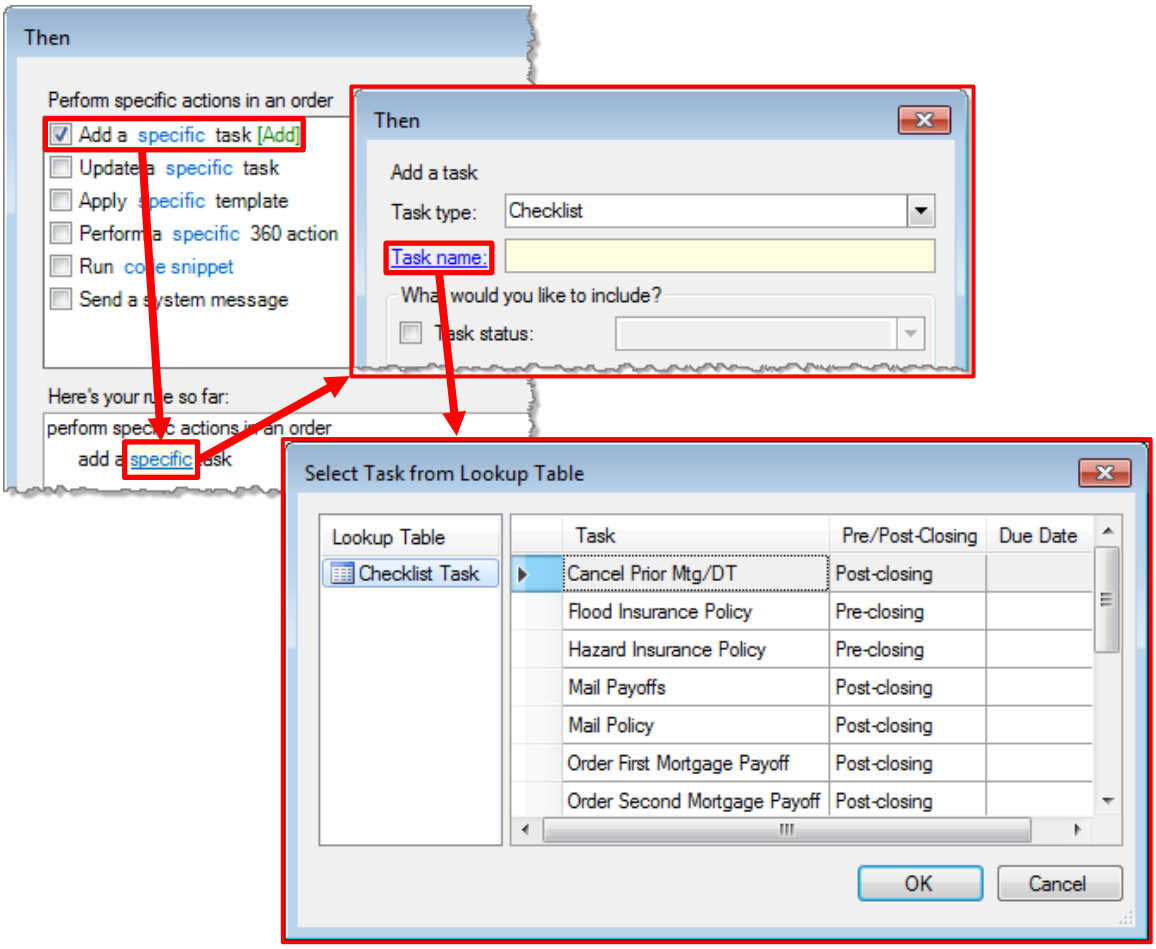

*Field Codes*

**Intellisense** has been added to support field code entry. *352337*

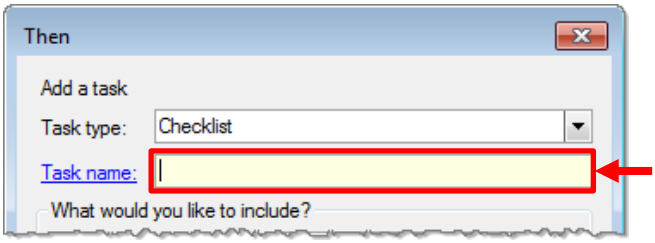


*Tasks*

A **dialog** has been added to **display task lookup tables and their entries**. The user may click the hyperlink shown when configuring **Add** or **Update task** options on the **Then screen**: *364592, 364597*




- In addition to using the hyperlink, the user may press **F9** or **Ctrl + L** in the **Task Name** field to pull up the dialog:




## Managers

*Fee Schedule*

An error was occurring when attempting to post transactions that referenced older rate versions. *374102*

# 4.2.3.1 (3/23/2017)

## *SoftPro 360*

The 360 client installation was experiencing an installation error. *377227*