

SoftPro Select 4.2.3.1

Release Notes | March 23, 2017

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SoftPro 360

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 <u>triggers</u> and <u>conditions</u> to automate <u>actions</u> 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:

SoftPro Select Server Creation Wizard
Application Insights
When enabled, this will transmit diagnostic and performance information to SoftPro to facilitate the support and enhancement of the application. Should you wish to prevent the transmission of this non-personal data, please select 'Disable Application Insights.'
 Enable Application Insights Custom Instrumentation Key: 4bed6907-345f-475d-9394-982af2e01739
Send to SoftPro
Next > Cancel

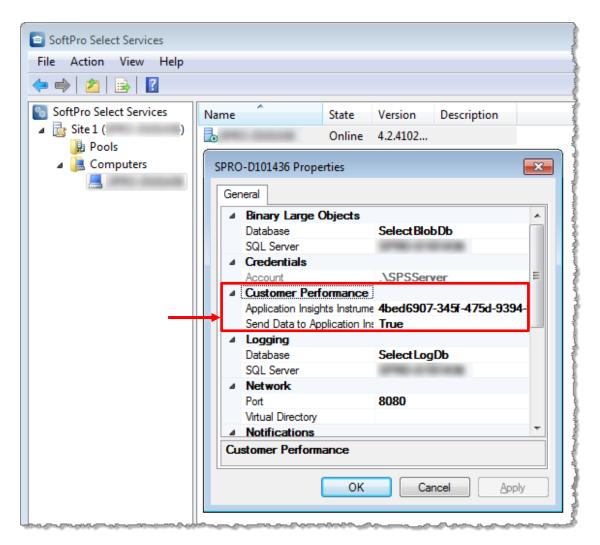
- Enable Application Insights is enabled.
- SoftPro's Application Insights key is input here.
- 2. You may **Disable Application Insights** if you wish; you may turn it on or make changes later:

SoftPro Select Server Creation Wizard
Application Insights
When enabled, this will transmit diagnostic and performance information to SoftPro to facilitate the support and enhancement of the application. Should you wish to prevent the transmission of this non-personal data, please select 'Disable Application Insights.'
Oisable Application Insights
Enable Application Insights
Custom Instrumentation Key:
4bed6907-345f-475d-9394-982af2e01739
✓ Send to SoftPro
More information
Next > Cancel

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**:

SoftPro Select Server Creation Wizard
igodot
Application Insights
When enabled, this will transmit diagnostic and performance information to SoftPro to facilitate the support and enhancement of the application. Should you wish to prevent the transmission of this non-personal data, please select 'Disable Application Insights.'
Disable Application Insights
Enable Application Insights
Custom Instrumentation Key:
Send to SoftPro
More information
Next > Cancel

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



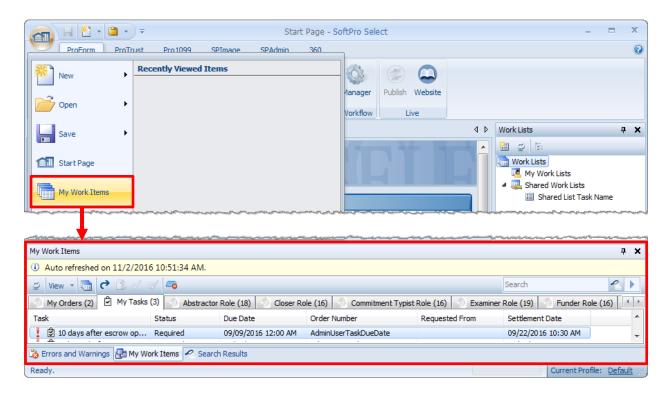
- If you do not see your machine under the **SoftPro Select Services** item in the pane at left, you may need to right click and select a computer to manage.
- After drilling down and selecting a computer in the pane at left, double click the server in the pane at right to view the configuration options.

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 <u>Work Lists</u>.

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**:

	Order 2016-1102-157 - SoftPro Select	Order Tools	- 🗆 X
	Pro 1099 SPImage SPAdmin 360	Order	0
Mew Order + Order Search Reports	New Group Deposition	Manager	Consh Website
Orders	Accounting	Workflow	Live

Work Lists

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

My Work Items						д	×
🙄 View - 🛅 🄁 🧠					Search	2	
My Orders (2) 🗗 My Tasks (3)	Examiner	Role (19) 📋 Sha	ared List Task Nan	ne (256)			
Task Name	Туре	Assigned To	Ta: Status	Due Date	Buyer	Address	*
First Pre-closing tasks-blank s	Checklist		Nor		JoeBob Buyer	1 Jolly Street, A-1	
📋 Pre-closing task-Complete	Checklist		None	04/28/2011 09:00 AM	JoeBob Buyer	1 Jolly Street, A-1	
📋 Duplicate Task Case test	Checklist		Required	05/06/2011 02:00 PM	JoeBob Buyer	1 Jolly Street, A-1	
Post-closing task-Blank status	Checklist		None		JoeBob Buver	1. Jolly Street, A-1	

<u>Filter</u>

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

My Orders (2)	Abstractor (3) Closer (2) Commitm	ent lypist (2) Administ	rator		}
Filter	▼ by	C iter	Show All	Order view(2)	Task view(2)

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.

Star	t Page 🗙			4 ۵	Work Lists		д X
	FTPRO SELECT	S E L	E C T		Work Lists Work Lists My Work Li Shared Wo		e
My Work It							
	refreshed on 11/2/2016 10:						
					Search		2
\odot	My Orders and Tasks	Abstractor Role (18	Select Work List		×	Examiner R	ole (🚹 👌
Task	My Roles	is Due Da				om	Settlen 📤
	Other's Orders and Tasks	ired 09/09/	Select a work list source from	the list l	below.		09/22/ 🗉
! E	Work List	ested	Shared Work Lists			ter Wit	09/22/
	Settings						•
b Errors a	and Warnings 📳 My Work It	ems 🤗 Search Results		lenee ⁿ e	~~~~~~	J	
Ready.					Cu	rrent Profile:	<u>Default</u>

<u>Toolbar</u>

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**: C Den or submit the item currently selected in the list.
- Work Lists: Den the Work Lists panel where you may create/view/manage your work lists. This does NOT open the Work Lists tab.
- View: 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 <u>refresh button</u> instead:

General Workflow Image: Workflow Image: Workflow Image: Workflow	8 🗙
A tomatically refreeb liste periodically	

 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.

My Work Items	×
General Workflow	
Show My Orders and Tasks when Select launches	
Show My Roles when Select launches	
Maximum results limit: 500	
Ignore maximum results limit	
Use of this setting can adversely affect performance.	

- 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:

New Work List 1 [Edit]* 🗙		
Run 🖷 📑 🔆 🔚 🔚 Options		
Query Options	-?	×
Results Sorting Advanced		
Available Columns:	Selected Columns:	
Name	Name Width	

• **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 <u>explained above</u>. My Orders are visible by default.

My Work Items								д х
🛫 View - 🛅 🏕 🗓 🚘 S							arch	2
My Orders (2) 🗗 My Ta	asks (3) 🕥 Examiner Ro	le (19) 📋 Share	ed List Task Name (i	256)				
Order Nonber	Settlement Date	Order Status	Address	City	Lender	Buyer	Seller	Escrow Officer
2009 HUD-1A Seller Pay	(In process			America First C			
AdminUserTaskDueDate	e 09/22/2016 10:30 AM	In process						
•								Þ
📸 Errors and Warnings 🛃 M	y Work Items 🖉 Search	Results						

My Tasks

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

My Work Items						д X
🙄 View 👻 🛅 🕻 🚺 🗸 I	Search	2				
My Orders (2) 🗹 My Tasks	(3) 💮 Examiner R	tole (19) 📋 Shared List	t Task Name (256)			
Task	Status	Due Date	Order Number	Settlement Date		
🚦 🕏 10 days after escrow op	Required	09/09/2016 12:00 AM	AdminUserTaskDueDate	09/22/2016 10:30 AM		
🖞 🖞 15 hours before sett	Required	09/21/2016 07:30 PM	AdminUserTaskDueDate	09/22/2016 10:30 AM		
🕏 Requested Task	Requested		2009 HUD-1A Seller Pay			

<u>Toolbar</u>

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 <u>explained above</u>.

Role

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

My Work Items						ą	×
🛫 View - 🛅 🌈 🍻 🕄	a 🚘				Search	2	
My Orders (2) 🗗 My Ta	asks (3) 🗇 Examiner Ro	le (19) 📋 Shared List T	ask Name (256)				
Order Number	Workflow Process	Workflow Step	Date Submitted	Transaction Type	Escrow Assistant	Title Officer	*
Order Status Closed	Workflow with 1 Step	Only Step Name Cha	05/20/2011 11:22 AM	Refinance	Alice Archambault	June Johnston	
Order Status Blank	Linked Step	Only Step Name Cha	05/20/2011 11:28 AM	Refinance	June Johnston	Christine Pfendle	a 👘
Test Workflow	Workflow with 1 Step	Only Step Name Cha	06/24/2010 01:27 PM	Refinance			
Test Workflow2	Workflow with 1 Sten	Only Step Name Cha	_06/24/2010 01:22 PM	Refinance			E

<u>Toolbar</u>

There are two buttons that are unique to this panel:

- Add : 😡 Open or submit the item currently selected in the list.
- Submit: ³ Open or submit the item currently selected in the list.
- The rest of the buttons visible here are <u>explained above</u>.

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.

الله المعالم ا	- • •
📴 🗔 🔀 🗙 🖶 这 🛝 🍐 🖦 🖓 🕫 🖏 🕸 🕮 🎼 🚍 🔛 🕨 TaskDueDate 🗸 👪	še - Σ - 🔞
Parameters Due: 0 Days After Order Created	
Order Created Commitment Completed Loan 1 Approval Settlement Borrower Signing Seller Signing Disbursement Escrow Closed Title Completed Task Created	
Description	Line Column
οκ	Cancel
Ready	Ln 1 Col 1 Ch 1

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:

Disclosures					×
Paid At Closing Paid Be	efore Closing (POC)				
Final Premiums/Settle	ment Statements/Regist	ter			
	Buyer	Seller	Other		Total
Loan policy:	\$266.00	+	+	=	\$266.00
Owner's policy:	\$286.00	+	+	=	\$286.00
Owner's seller pay 🖏	:		%		
Total:	\$552.00				\$552.00
Full Premiums/CDF					
	Buyer	Seller	Other		Total
Loan policy (C.02):	\$231.00	+	+	=	\$231.00
Owner's policy (H.02): \$321.00	+	+	=	\$321.00
Seller credit:]		
Total:	\$552.00				\$552.00
					Close

 \$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:

Dis	closures								×
	Paid At Closing	Paid Before Closing (POC	;)						
	Final Premiums/Se	ettlement Statements/Reg	ster						
		Buyer		Seller		Other		Total	
	Loan policy:	\$266.00	+		+		=	\$266.00	
	Owner's policy:	\$286.00	+		+ [=	\$286.00	
	Owner's seller pa	y %:			%				
	Total:	\$552.00					!	\$552.00	
	Full Premiums/CD	F					1		
		Buyer	_	Seller		Other	<u>/</u>	Total	
	Loan policy (C.02	2): \$231.00	+		+	\$50.00	=	\$281.00	
	Owner's policy (H	1.02): \$321.00	+		+		=	\$321.00	
	Seller credit:]				
	Total:	\$552.00				\$50.00	! _	\$602.00	
								Close	e

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

Disc	closures				×
	Paid At Closing	aid Before Closing (POC)			
	Final Premiums/Sett	lement Statements/Register			
		Buyer	Seller	Other	Total
	Loan policy:	\$266.00 +		+ =	\$266.00
	Owner's policy:	\$286.00 +		+ =	\$286.00
	Owner's seller pay	%:		%	
	Total:	\$552.00			\$552.00
	- Full Premiums/CDF		/		
		Buyer	Seller	Other	Total
	Loan policy (C.02):	\$181.00 +		+ \$50.00 =	\$231.00
	Owner's policy (H.()2): \$321.00 +		+ =	\$321.00
	Seller credit:				
	Total:	\$502.00		\$50.00	\$552.00
					Close

 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:

)isclosures							×
Paid At Closi	ng Paid Before	Closing (POC)	\sim				
Final Pren	niums/Settlemen	t Statements/Register-					
		Buyer	Seller	- Othe	er	Total	
Loan po	licy:	\$216.00 +		+ \$	\$50.00 =	\$266.00	
Owner's	policy:	\$286.00 +		+	=	\$286.00	
Owner's	seller pay %:			%			
Total:		\$502.00		\$	\$50.00	\$552.00	
-Full Premi	iums/CDF						
		Buyer	Seller	Othe	er	Total	
Loan po	licy (C.02):	\$181.00 +		+ \$	\$50.00 =	\$231.00	
Owner's	policy (H.02):	\$321.00 +		+	=	\$321.00	
Seller cr	edit:						
Total:		\$502.00		\$	\$50.00	\$552.00	
L						Close	e

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

Disclosures
Paid At Closing Paid Before Closing (POC)
Final Premiums/Settlement Statements/Register
Buyer POC Seller POC
Loan policy:
Owner's policy:
Total: \$100.00
Full Premiums/CDF
Buyer POC Seller POC
Loan policy (C.01): \$100.00
Owner's policy (H.01):
Total: \$100.00
Close

Disclosures				×
Paid At Closing Paid Before	Closing (POC)		<u> </u>	
Final Premiums/Settlemen	it Statements/Register			
	Buyer	Seller	Other	Total
Loan policy:	\$150.00 +	\$0.00	\$0.00	\$250.00
Owner's policy:	\$2,187.50 +		• =	\$2,187.50
Owner's seller pay %:			%	
Total:	\$2,337.50			\$2,437.50
Full Premiums/CDF				
	Buyer	Seller	Other	Total
Loan policy (C.01):	\$950.00 +			\$1,050.00
Owner's policy (H.01):	\$1,387.50 +		+ =	\$1,387.50
Seller credit:				
Total:	\$2,337.50			\$2,437.50
				Close

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

<u>Options</u>

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

Title - CDF section defa		- 17 115
Owner's policies:	Other Charges	
All other title fees:	Services Borrower Did Shop For	
Group endorsements:	None	
Credit for seller paid pr	emium(s):	
Apply seller credit	to borrower paid loan policy on CDF Page 2	
Apply general selle	er credit on CDF Page 3	
Charge borrower	full premiums on CDF Page 2 and apply seller credit on CDF Page 3	

- 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:

Owner's Policy			
Policy number:			
Coverage amount:		Prior policy adjustment:	
Seller pay %:	100.00000	Seller pay amount:	\$800.00
Final owner's premium:	\$800.00	Transaction code:	-
SI net owner's premium:	\$500.00		
Remarks:			
Owner's Policy Premium and	Split		
Owner's Policy Premium			
Basis:	•	Invoice:	
Coverage amount:		Bill code:	
Method:	Default 👻		
Rate table:	•		
Base premium:	\$800.00		
Prior policy adjustment:			
Multiplication %:	100.00000		
Simultaneous issue fee:			
Adjustment: +/-			
Final owner's premium:	\$800.00		
SI net owner's premium:	\$500.00		
Line:	H.01	Title - Owner's Title Insurance	
Seller credit to borrower:	\$300.00	Line:	

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 Spl	lit		
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 • <u>CDF: 1</u>	Title - Lender's Title Insurance]

• The amounts are balanced correctly in the Disclosures Dialog:

D	isclosures				×
	Paid At Closing Paid I	Before Closing (POC)			
	Final Premiums/Sett	lement Statements/Register-			
		Buye	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				
		Buyet	Seller	Other	Total
	Loan policy (C.01):	+	\$400.00 +	=	\$400.00
	Owner's policy (H.()1): +	\$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:

SI net owner's premium:		\$500.00	~~~~	~**^^
Line:	H.01 🔻	<u>CDF: 1</u>	Title - (Owner's Title Insurance
Seller credit to borrower:	Ś	\$300.00	Line:	-
and the second		and the second	n	

• This applies to the <u>options 1 & 2 discussed above</u>.

<u>Disclosures</u>

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

Owner's policy:		_ +	+	=
Seller credit:				
Total:				
-				
Show final premiu	um on Settlement Sta	itement		
	um on Settlement Sta n on Settlement State			

• 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

<u>Attachments</u>

• 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

<u>Settlement Statements</u>

• 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
 - o 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

	Check printing alignment						
	Horizontal adjustment:		0.	.0000	inches		
Ι.	Vertical adjustment:		0.	.0000	inches		
	MICR start position:			0	inches		
	MICK start position:	or generating ch	neck numbers	0	inches		

<u>Policy</u>

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

<u>Profiles</u>

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

fault					? 🔀
1099		Members		Classic	Connections
General	Other	Order		HUD	Accounting
Register/Ledger			Ар	prove pending disbur	sements
Use ProForm-gene	erated transactions			Approval required	
Automatic close of	f escrow when criteria	a is met and		All disbursement	s
 all funds are p 	osted			Checks only	
all revenue is	posted		-		
	k of escrow when crite iness days 💌 hav	eria is met and e passed	-Co	nstruction Draws Require contract ar	nounts
	en escrow locked t transaction form" op	tion	V	Require tax IDs Require \$ 0 balance	for approval

- 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 <u>CDF Section E</u> & <u>HUD</u> <u>Section 1200</u>. Two <u>new reports</u> were also added to assist in identifying orders that have overages or shortages and need to be reconciled: <u>356928</u>

Actual Charges			X
	Initial	Re-Recorded	Bill Code
Recording fees:			•
Transfer taxes:			•
Recording service charges:			•
Recording service charges	s are not eligible for reiml	bursement (omit from tota	ıls)
Total charged:			
Total actual charges:			
Overage (+)/Shortage (-):	:		
Reconcile complete			
			Close

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 <u>reports</u> 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:

E. 1	Taxes and Other	Gover	nment F	ees	;			
Cha	rges for Line 01							
+	_							
	Description			Re	То		er-Paid Closing	Borrower- Before Clo
▶ 1	Recording Fees							
Fees	Details Payors Paye	es						
	Fee Schedule Type	Pages	Document		Fee Sche	edule		Amour
*								
Actua	al Charges							

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

1200. GO HUD-1:	Loan 1	ANSFE	<u>R CHARGES</u>			
+ -						
	Description	Re	Borrower	Seller	HUD-1 To Code	HUD-1 To Name
1201	Government recording charges					
1202	Deed/Mortgage/Release					
1203	Transfer taxes					
1204	City/County tax/stamps					
1205	State tax/stamps					
н	UD-1 to: FE type: Can increase up to 10%		GFE amount:		GFE nu	mber: 7 v
Payors						-
ayees						
ctual Ch	27202					

Example:

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

Ch	arges for Line 01											
t	_	_					5.11					
	Description			Re	То		ver-Paid Closing	Borrower-Pai Before Closin			Seller-Paid ore Closing	Paid By Other
▶ 1	Recording Fees				G		\$10.00					
Fee	es Details Payors Pay	rees										
	Fee Schedule Type	Pages	Document		Fee S	chedule		Amount	Seller Pay %	Fee Type		
Þ	Recording		Mortgage/D	eed of Trust				\$10.00	╡	Recording	Fee For M	ortgage
	_											

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

Actual Charges			—
	Initial	Re-Recorded	Bill Code
Recording fees:	\$12.00		REC 💌
Transfer taxes:			•
Recording service charges:	\$3.00		REC 💌
Recording service charges	are not eligible for	reimbursement (or	mit from totals)
Total charged:		\$10.00	
Total actual charges:		\$15.00	
Overage (+)/Shortage (-):		-\$5.00	
Reconcile complete			
			Close

- 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 <u>report section</u> 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 <u>example</u> <u>above</u> will help to demonstrate how these reports work:

ProForm Reports +	×
🗁 Default	
Aged Accounts Receivable	
Orders By Contact	
Orders By Employee	
Orders By Location	
Orders By Marketing Rep	
Orders Received	
🖻 🧧 Open Order Tasks	
▷ 🚞 Completed Order Tasks	
My Reports	
▷ 🚞 Orders By Status	
V and the second sec	
Production	
4 🧁 Fees/Revenue	
Fees by Bill Code	
Fees Not Disbursed	
A Concile Recording Charges	
Reconcile Recording Charges By Bill Code	
Reconcile Recording Charges By CDF/HUD-1 Line	
Policy Register Liability	

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

Reconcile Recording Char	rges By Bill Code	×
Office:		•
Settlement date from:	(None)	
Settlement date through:	(None)	E
Include columns:	Order type Transaction type Escrow officer name Property county (1st)	
Reconcile type:*	Overages & shortages 💌	
Include:	Reconcile complete orders Recording service charges not eligible for reimbursement	Ŧ
* Required	OK Cancel	

- 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:

		Recon	cile Reco	rding 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 Actual Total Overage (+)/Shortage (-)	: 15.00

- Reconcile Recording Charges By CDF/HUD-1 Line:
 - This report work just like the <u>charges by Bill Code</u> 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:

	F	Reconci	le Recording	Charges B	y CDF/Hl	JD-1	Lin
Settlem	Office: All ent Date: All	↓ I					
Order Number Office	Settlement Date Completed Date	Line Number	Description	Buyer Amount	Seller Amount	Bill Cod	e
2017010001							
		E.01	Recording Fees	10.00	0.00	REC	
				Charge Line Total: Actual Total: Overage (+)/Shortage (-):			10.0 15.0 -5.0

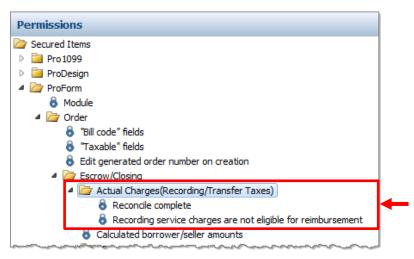
• After reviewing the overages/shortages in the reports, you may go back to the corresponding orders to pull up the Actual Charges dialogs & check the following checkboxes:

Actual Charges			—				
	Initial	Re-Recorded	Bill Code				
Recording fees:	\$12.00		REC 💌				
Transfer taxes:			· ·				
Recording service charges:	\$3.00		REC 💌				
Recording service charges	are not eligible for reimbur	sement (omit from to	otals)				
Total charged:		\$10.00					
Total actual charges:		\$12.00					
Overage (+)/Shortage (-):		-\$2.00					
Reconcile complete	-		Close				

- **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

ProForm Search	Order 2017020001* 🗙		4 Þ	Field Code Browser	џ	×
00-				👄 🖸		
Expre	ess Order Entry			Path: Order.Properties.Address.Address	:1	
				Acreage		
Property address:			^	Address		
riperty address				Address1		
			N	Address1Address2		-
City:			State:	Address2		-
				Address1		
				Context: Address Type: String (100)		
In the:		▼ <u>of</u>		The first line of the address.		
	A. a have been a second					~

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

ProForm Search	×					1
Order Information						1
Order #:			Who has the file:		Order type:	
Settlement date:	(None) 🔹	through (None)	Order status:		Product type:	
Order reserved:	(None) 🔹	through (None)	Escrow status:	-	Transaction type:	
Order received:	(None) 🔹	through (None)	Title status:	-	Title officer:	
Order completed:	(None) 🔹	through (None)	Loan #:		Escrow officer:	
Project name:			Mtg. ins. case #:		Escrow assistant:	

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:

Simultaneous Issue				?	×			
General Own	er's Policy Loan Policy	Prior Polic	Sim	nultaneous Issue				? 💌
Premium calculati	on			General Owne	er's Policy	Loan Policy	Prior Policy	Guaranty Fees
Basis:	Sales Price 💌	Multiplicatio		Premium calculation	n			
Rate table:	Premium Rate	Adjustment		Basis:	Loan Amoun	t 🔻	Multiplication %:	100.00000
Method:	Default 🔽	Simultaneo		Rate table:	Premium Rat	e 💌	Adjustment +/-:	
Send premium to	Default Higher Premium			Method:	Default	-	Simultaneous fee:	
CDF:	Higher Premium Difference	e 🗲		Multiplication % fo	Default		licy:	
		and Doolo		Premium calculati	Loan High Higher Pre			
				Rate table:	Higher Pre	mium Differenc	e 🗲	
				Send premium to	TX-Sim			

Title Insurance Premiums Screen:

	Loan Policy Premium and Sp	lit 🔺
▼ Invoice	Loan Policy Premium	
Bill code	Basis:	▼ Invoice: ▼
ault 👻	Coverage amount:	Bill code:
ault	Method:	Default 👻
her Premium Difference	Rate table:	Default Higher Premium
And the second s	Base premium:	Higher Premium Difference
	Drier policy adjustments	Loan Higher
		TX-Sim
a 1 1	Bill code	

- **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:

General Entries	
Name:	Discount Rate
Description:	
	-
Last modified on:	2/21/2017 3:24 PM
Last modified by:	Default Admin Account
Version:	1 Current
Underwriter effective date:	(None) 👻
Minimum premium:	\$75.00

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

<u>Overlay</u>

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

Order

<u>Endorsements</u>

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

<u>Loan</u>

• 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

<u>Documents</u>

- 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

<u>Attachments</u>

- 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

ProForm Search 1099 Record (1)* X	4 ۵
Information NOT submitted to the IRS Image: Information NOT submitted to the IRS Image: Information NOT submitted to seller Image: Information NOT submitted to seller Image: Information NOT submitted to seller Image: Image: Information NOT submitted to seller Image: I	Exempt
Information submitted to the IRS	
Order number: Correction status: This is not a corrected return	
IRS name control:	
Tax ID type	
Individual Organization	
Seller name - Last, First: Tax ID/SSN: Foreign perso	on
Continuation of name: Tax ID/SSN:	_
and the contraction of the contr	round

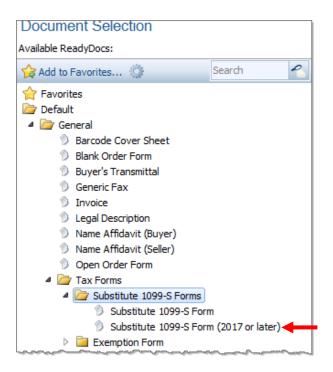
Seller Proceeds (1099-S)

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

	D s	eller Proce	eds & 109	9-S							
E	xclude or	der from IRS sul	bmission								
1099	-S descrip	tion:									
Total	cash to s	ellers: \$	500,000.00	Divert se	eller proceeds to	line:	-	_			
Total	buyer's p	art of real estat	e taxes:					↓			
	Name	Continuation of Name	Percentage of Total	Cash to Seller	1099-S Proceeds	Buyer's Part of Real Estate Tax	Property Services Received	Foreign Person	1099-S Provided	1099-S Signed	Exempt from 1099 Reporting
Þ			100.00000	\$500,000.00	\$500,000.00	0.00					

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:

	PROCEEDS FR	STITUTE FORM 10 OM REAL ESTATE THE TAX YEAR: OMB No. 1545-0997	TRANSACTIONS	
	FILER'S NAME AND ADDRESS	Order Numbe	II Tax ID Number: r: Federal Tax II Number:	2017020001
1) Date of Closing: 02/09/17	2) Gross Proceeds: 100000.00	 X here if property or services received: 	5) X here if foreign person: X	6) Buyer's part of real estate tax: 0.00

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

Anager	ment Console - SoftPro Select	}
ProForm ProTrust ProDes	sign Pro 1099 SPImage SPAdmin	
😥 🐇 Export Data	5	
Configuration Reports	Export Data	
Administration		
	Select Your Data Please select one or more items	you would like to export.
	Items	Search 🗠 👻
	Policies Premium Rates Precesses Profiles	

Permissions

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

Permissions	Search	€. ▼
🧁 Secured Items		1
Pro 1099		
ProDesign		
▷ 📴 ProForm		

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

Processes			Search		~ ▼	
Name	Category	Description		Last Modifie	Last Modified By	
🔯 Add Title Search Task	d Title Search Task Tasks Adds a title search task to the order wh.			10/28/201	Default Admin Accou	
Title-Only Template	Templates	Applies the basic title template if the or		10/28/201	Default Admin Accou	
have a second						

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

Automation Process Wizard	
(D) When	♥ If Then
Then do the following: Add a specific task Update a specific task	
Apply specific template [Add] Perform a specific 360 action Run code snippet	Then
Send a system message	Select the template
Here's your ule so far: <u>First time</u> an order is saved then do ve following: apply <u>specific</u> template	OK Cancel
	Finish Cancel

Field Codes

Intellisense has been added to support field code entry. 352337

If			— ×
Field is Current context: Order Field code: {{Order.Abs updated populated blank = = =	 Address AllPeopleWithCommas Code ContactType ContactTypeDescription DivertProceedsTo Email Fax IncludeOnRevenueReports IsGroupContact IsMarketingSource LicenseNumber LookupCode 		Cancel
	 MainPerson MarketingRep 	-	

<u>Tasks</u>

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*

Then		Numb				
Perform specific actions in an order Add a specific task [Add] Update a specific task Apply specific template Perform a specific 360 action Run cole snippet Send a system message Here's your rule so far: perform specific actions in an order	Then Add a task Task type: <u>Task name:</u> Wha would Task sta	-	clist e to include?			
add a specific lask	ct Task from Look	up Ta	ble			×
	ookup Table Checklist Task	•	Task Cancel Prior Mtg/DT Flood Insurance Policy Hazard Insurance Policy Mail Payoffs	Pre/Post-Closing Post-closing Pre-closing Pre-closing Post-closing	Due Date	- m
		•	Mail Policy Order First Mortgage Payoff Order Second Mortgage Payoff III	Post-closing Post-closing Post-closing OK	Cancel	•

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

Then		—
Add a task		
Task type:	Checklist	-
Task name:	I	_+
	you like to include?	

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