



SoftPro Select 4.2.3.2

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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:

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.'

☐ Disable Application Insights

☒ Enable Application Insights

Custom Instrumentation Key:
4bed6907-345f-475d-9394-982af2e01739

☒ Send to SoftPro

[More information](#)

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.'

☒ Disable Application Insights

☐ Enable Application Insights

Custom Instrumentation Key:
4bed6907-345f-475d-9394-982af2e01739

☒ Send to SoftPro

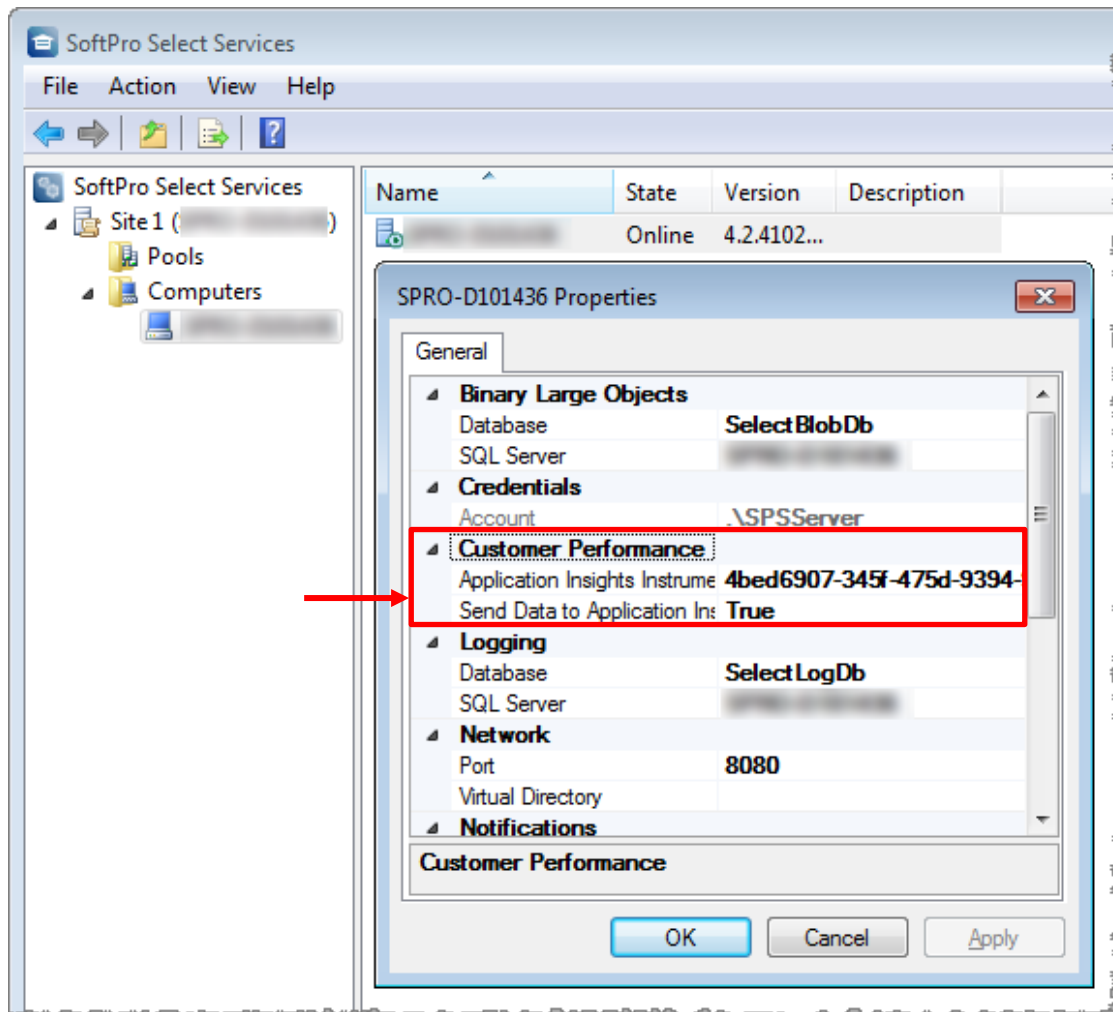
[More information](#)

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**:

The screenshot shows the 'Application Insights' step of the 'SoftPro Select Server Creation Wizard'. The window has a blue header bar with a back arrow icon. The title 'Application Insights' is in blue. Below it, a paragraph explains that enabling this will transmit diagnostic and performance information to SoftPro for support and enhancement, and that users can select 'Disable Application Insights' to prevent this. There are two radio buttons: 'Disable Application Insights' (unselected) and 'Enable Application Insights' (selected). Below the radio buttons is a red rectangular box containing the text 'Custom Instrumentation Key:' followed by an empty text input field. Two red arrows point to the input field. Below the input field is a checkbox labeled 'Send to SoftPro', which is currently unchecked. A blue link 'More information' is located to the right of the checkbox. At the bottom right, there are two buttons: 'Next >' (highlighted in blue) and 'Cancel'.

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



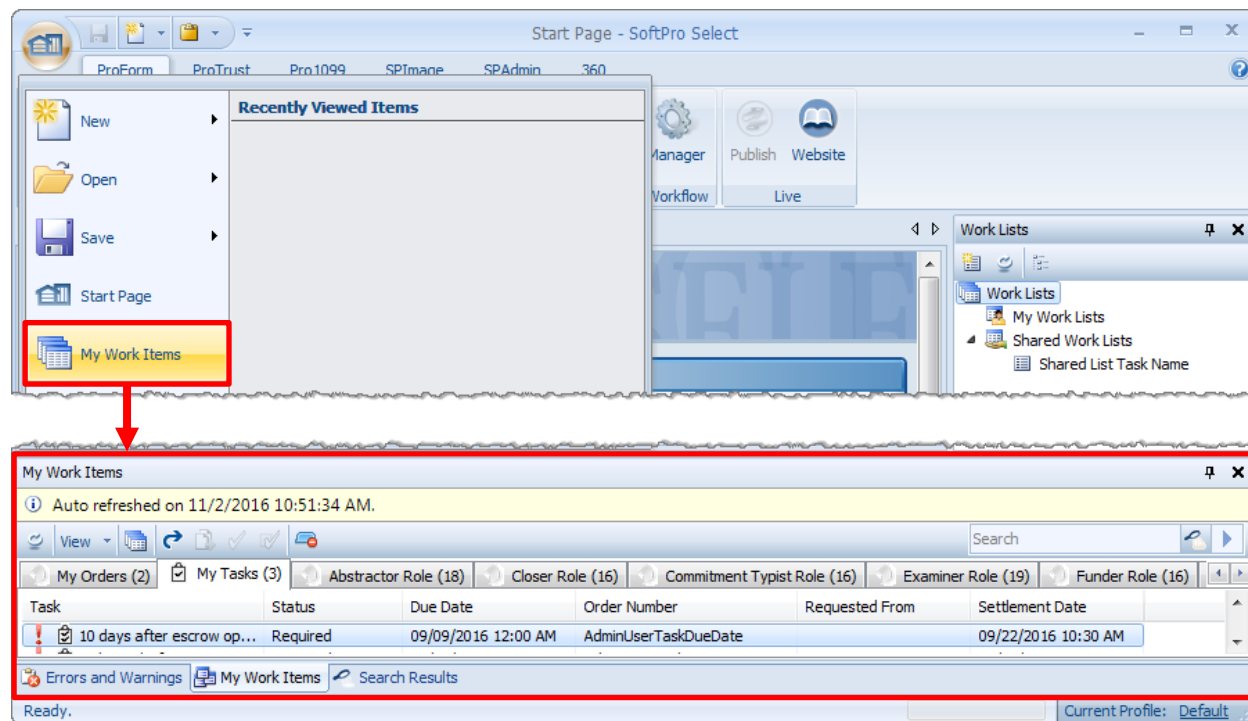
- If you do not see your machine under the **SoftPro Select Services** item in the pane at left, you may need to right click and select a computer to manage.
- After drilling down and selecting a computer in the pane at left, double click the server in the pane at right to view the configuration options.

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 [Work Lists](#).

Access

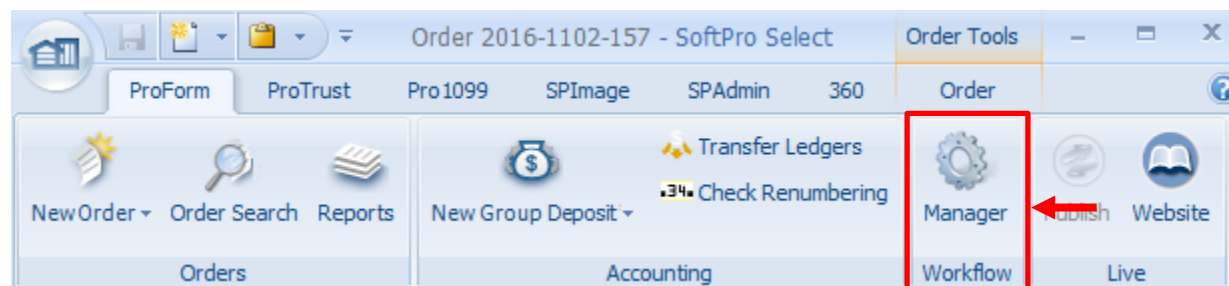
Access **My Work Items** in the panel at the bottom of the screen. You can reopen it through the main menu:



Layout Changes

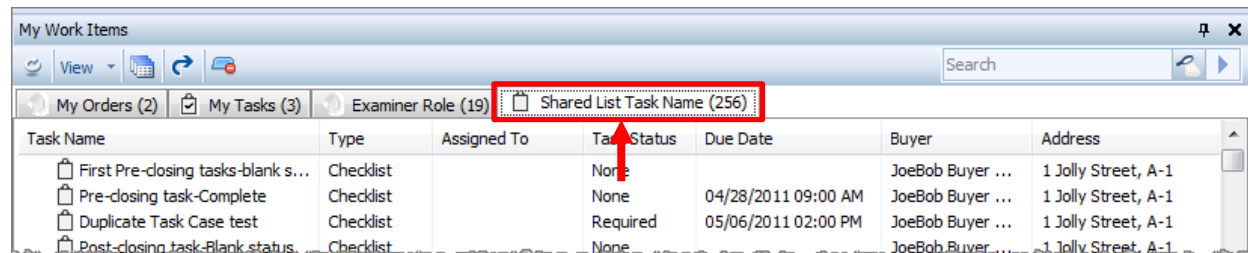
Workflow Order Manager

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



Work Lists

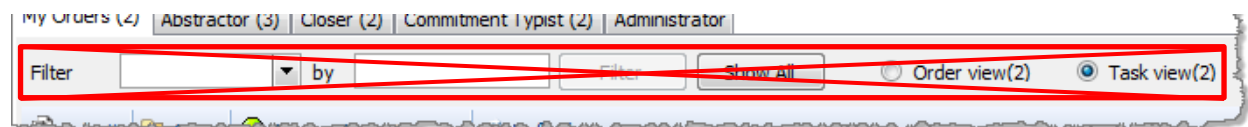
Work Lists results are now available in the same panel with **My Orders** and **My Tasks**.



Task Name	Type	Assigned To	Task Status	Due Date	Buyer	Address
First Pre-closing tasks-blank s...	Checklist		None		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 Buyer ...	1 Jolly Street, A-1

Filter

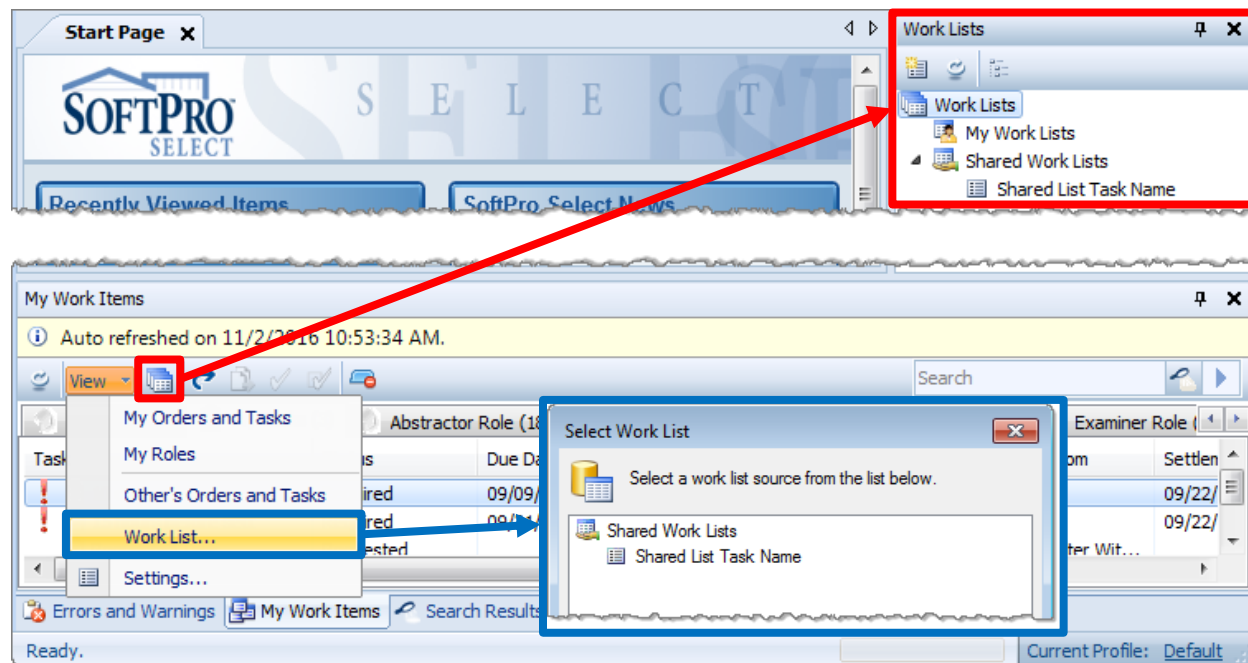
The **Filter** was removed from my work items; the Filter Queue permission was also removed from SPAdmin:



Accessing





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

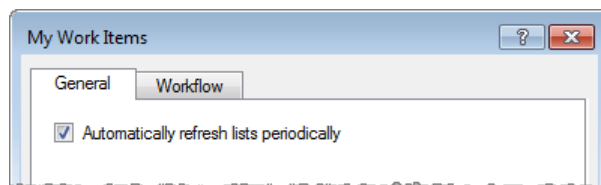
1. You will still **create** Work Lists in the **original location**.
2. You can **view** Work Lists results in this **new panel** OR the **original location**.



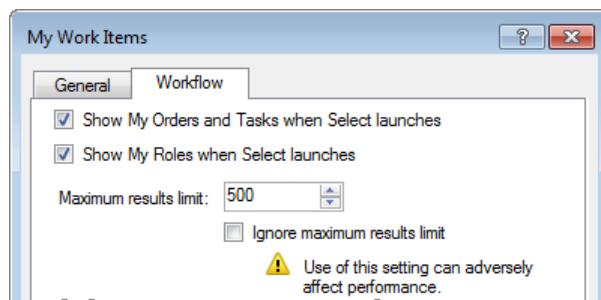
Toolbar

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:

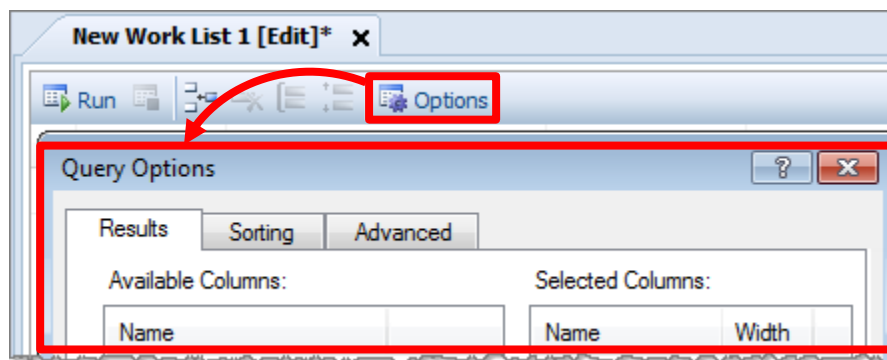
- **Close:**  This button will close the tab you are currently viewing.
- **Open/Submit:**  Open or submit the item currently selected in the list.
- **Work Lists:**  Open the **Work Lists panel** where you may create/view/manage your work lists. This does NOT open the Work Lists tab.
- **View:**  This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



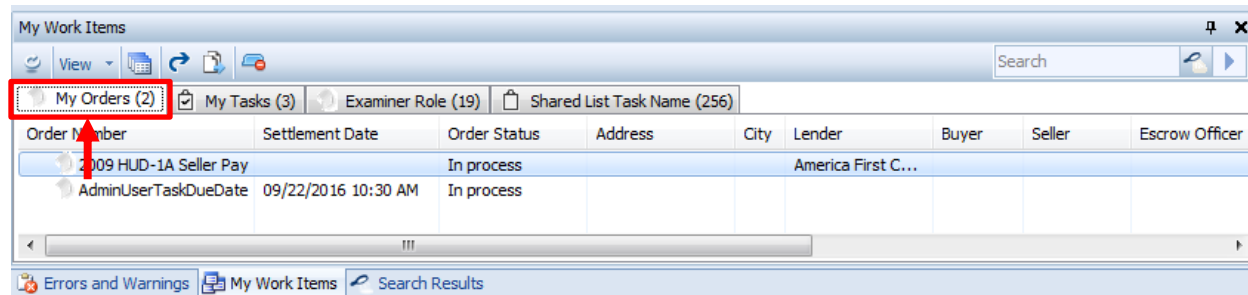
- You may specify the number of results you receive, or use the checkbox to return all results.
- **Remember:** Work List settings are located under the **Options** when creating Work Lists:



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

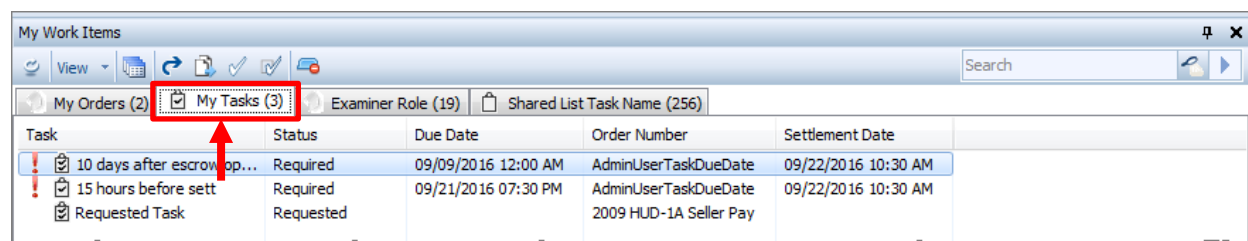
My Orders

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:



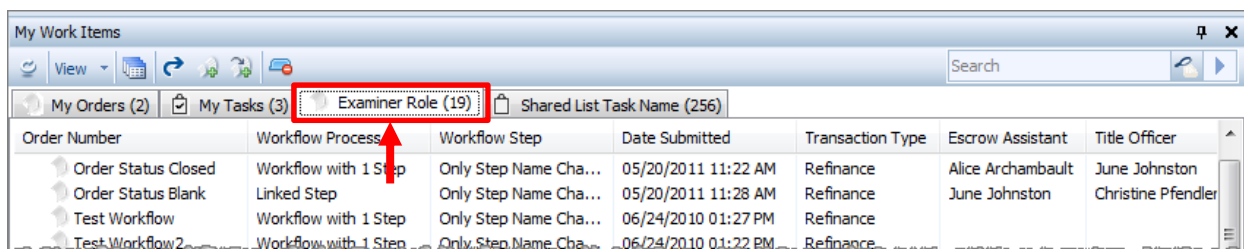
Toolbar

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:



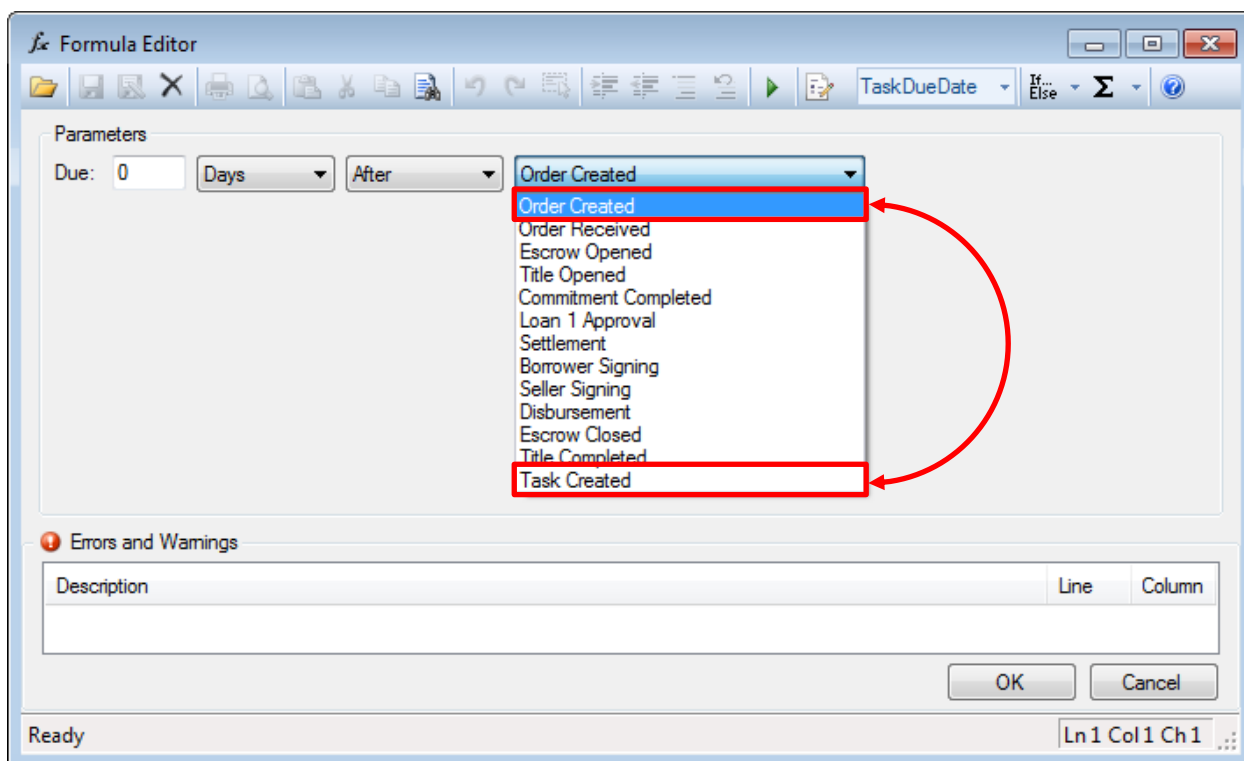
Toolbar

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:

Disclosures

Paid At Closing | Paid Before Closing (POC)

Final Premiums/Settlement 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):	\$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:

Disclosures

! Paid At Closing Paid Before Closing (POC)

Final Premiums/Settlement 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):	\$231.00	+		+	\$50.00	=	\$281.00
Owner's policy (H.02):	\$321.00	+		+		=	\$321.00
Seller credit:							
Total:	\$552.00				\$50.00 !		\$602.00 !

Close

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

Disclosures

! Paid At Closing Paid Before Closing (POC)

Final Premiums/Settlement 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.02):	\$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:

Disclosures

Paid At Closing Paid Before Closing (POC)

Final Premiums/Settlement Statements/Register

	Buyer		Seller		Other		Total
Loan policy:	\$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 Premiums/CDF

	Buyer		Seller		Other		Total
Loan policy (C.02):	\$181.00	+		+	\$50.00	=	\$231.00
Owner's policy (H.02):	\$321.00	+		+		=	\$321.00
Seller credit:							
Total:	\$502.00				\$50.00		\$552.00

Close

- **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:	\$100.00		
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

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

Disclosures

Paid At Closing | Paid Before Closing (POC)

Final Premiums/Settlement 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

Options

- 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 defaults

Owner's policies: Other Charges

All other title fees: Services Borrower Did Shop For

Group endorsements: None

Credit for seller paid premium(s):

- ☐ Apply seller credit to borrower paid loan policy on CDF Page 2
- ☒ Apply general seller 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:	<input type="text"/>		
Coverage amount:	<input type="text"/>	Prior policy adjustment:	<input type="text"/>
Seller pay %:	<input type="text" value="100.00000"/>	Seller pay amount:	<input type="text" value="\$800.00"/>
Final owner's premium:	<input type="text" value="\$800.00"/>	Transaction code:	<input type="text"/>
SI net owner's premium:	<input type="text" value="\$500.00"/>		
Remarks:	<input type="text"/>		

Owner's Policy Premium and Split

Owner's Policy Premium

Basis:	<input type="text"/>	Invoice:	<input type="text"/>
Coverage amount:	<input type="text"/>	Bill code:	<input type="text"/>
Method:	<input type="text" value="Default"/>		
Rate table:	<input type="text"/>		
Base premium:	<input type="text" value="\$800.00"/>		
Prior policy adjustment:	<input type="text"/>		
Multiplication %:	<input type="text" value="100.00000"/>		
Simultaneous issue fee:	<input type="text"/>		
Adjustment: +/-	<input type="text"/>		
Final owner's premium:	<input type="text" value="\$800.00"/>		
SI net owner's premium:	<input type="text" value="\$500.00"/>		
Line:	<input type="text" value="H.01"/> CDF: 1	<input type="text" value="Title - Owner's Title Insurance"/>	
Seller credit to borrower:	<input type="text" value="\$300.00"/>	Line:	<input type="text"/>

Loan Policy

Policy number:

Coverage amount:

Seller pay %:

Final loan premium:

Full loan premium:

Remarks:

Prior policy adjustment:

Seller pay amount:

Transaction code:

Loan Policy Premium and Split

Loan Policy Premium

Basis:

Coverage amount:

Method:

Rate table:

Base premium:

Prior policy adjustment:

Multiplication %:

Simultaneous issue fee:

Adjustment: +/-

Final loan premium:

Full loan premium rate table:

Full loan premium:

Additional Calculations...

Invoice:

Bill code:

Line: 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:

The screenshot shows a form with the following fields and values:

- SI net owner's premium:** \$500.00
- Line:** H.01
- CDF:** 1
- Title - Owner's Title Insurance**
- Seller credit to borrower:** \$300.00 (This field is highlighted with a red box and a red arrow pointing to it from the text above.)
- Line:** (Empty dropdown)

- This applies to the [options 1 & 2 discussed above](#).

Disclosures

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

The screenshot shows a dialog box with the following fields:

- Owner's policy:** [] + [] + [] = []
- Seller credit:** []
- Total:** []
- Radio buttons (crossed out with a red X):**
 - ☒ Show final premium on Settlement Statement
 - ☐ Show full premium on Settlement Statement

- 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:

The screenshot shows two dialog boxes. The left dialog box is titled "Simultaneous Issue:" and contains the following checkboxes:

- ☐ Show both policy numbers on both policies
- ☒ Show full premium on CDF/HUD-1
- ☒ Show full premium on Settlement Statement
- ☐ Show full premium on invoice

The right dialog box is the same as the one in the previous screenshot, but with the radio buttons highlighted in yellow and green. Red arrows point from the checkboxes in the left dialog to the corresponding radio buttons in the right dialog:

- From "Show full premium on CDF/HUD-1" to "Show final premium on Settlement Statement"
- From "Show full premium on Settlement Statement" to "Show full premium on Settlement Statement"

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

Check printing alignment

Horizontal adjustment: 0.0000 inches

Vertical adjustment: 0.0000 inches

MICR start position: 0 inches

☒ Enable this manager for generating check numbers

OK Cancel Apply

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

	Initial	Re-Recorded	Bill Code
Recording fees:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Transfer taxes:	<input type="text"/>	<input type="text"/>	<input type="text"/>
Recording service charges:	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Recording service charges are not eligible for reimbursement (omit from totals)			
Total charged:	<input type="text"/>		
Total actual charges:	<input type="text"/>		
Overage (+)/Shortage (-):	<input type="text"/>		
<input type="checkbox"/> Reconcile complete			

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:

E. Taxes and Other Government Fees
Charges for Line 01

	Description	Re	To	Borrower-Paid At Closing	Borrower-Paid Before Closing
▶ 1	Recording Fees				

Fees **Details** Payors Payees

	Fee Schedule Type	Pages	Document	Fee Schedule	Amount
*					

[Actual Charges](#)

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

1200. GOVERNMENT RECORDING AND TRANSFER CHARGES

HUD-1: Loan 1

	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					

1201 Government recording charge Re: Borrower

HUD-1 to:

GFE type: GFE amount: GFE number:

Payors

Payees

Actual Charges

Example:

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

E. Taxes and Other Government Fees

Charges for Line 01

	Description	Re	To	Borrower-Paid At Closing	Borrower-Paid Before Closing	Seller-Paid At Closing	Seller-Paid Before Closing	Paid By Others
▶ 1	Recording Fees		G	\$10.00				

Fees **Details** **Payors** **Payees**

	Fee Schedule Type	Pages	Document	Fee Schedule	Amount	Seller Pay %	Fee Type
▶	Recording		Mortgage/Deed of Trust		\$10.00		Recording Fee For Mortgage
*							

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

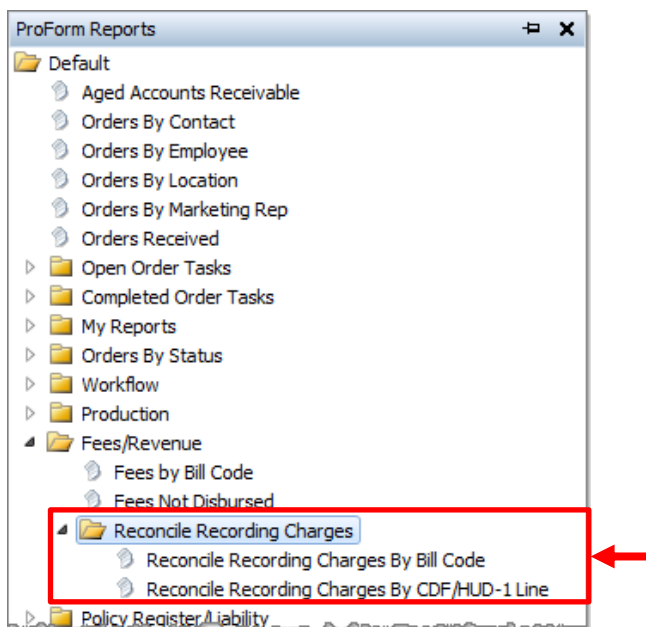
	Initial	Re-Recorded	Bill Code
Recording fees:	\$12.00		REC
Transfer taxes:			
Recording service charges:	\$3.00		REC
<input type="checkbox"/> Recording service charges are not eligible for reimbursement (omit from totals)			
Total charged:	\$10.00		
Total actual charges:	\$15.00		
Overage (+)/Shortage (-):	-\$5.00		

☐ Reconcile complete

Close

- The difference between the **Total charged** (CDF data) and the **Total Actual charges** (data input into the dialog) results in a **\$5 shortage**.
- 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:

Reconcile Recording Charges By Bill Code

Office:

Settlement date from:

Settlement date through:

Include columns:

- ☐ Order type
- ☐ Transaction type
- ☐ Escrow officer name
- ☐ Property county (1st)

Reconcile type:

Include:

- ☐ Reconcile complete orders
- ☐ Recording service charges not eligible for reimbursement

* 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:

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:

Reconcile Recording Charges By CDF/HUD-1 Line

Office: All

Settlement Date: All

Order Number	Office	Settlement Date	Completed Date	Line Number	Description	Buyer Amount	Seller Amount	Bill Code
2017010001				E.01	Recording Fees	10.00	0.00	REC
Charge Line Total:						10.00		
Actual Total:						15.00		
Overage (+)/Shortage (-):						-5.00		

- 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 reimbursement (omit from totals)

Total charged:

\$10.00

Total actual charges:

\$12.00

Overage (+)/Shortage (-):

-\$2.00

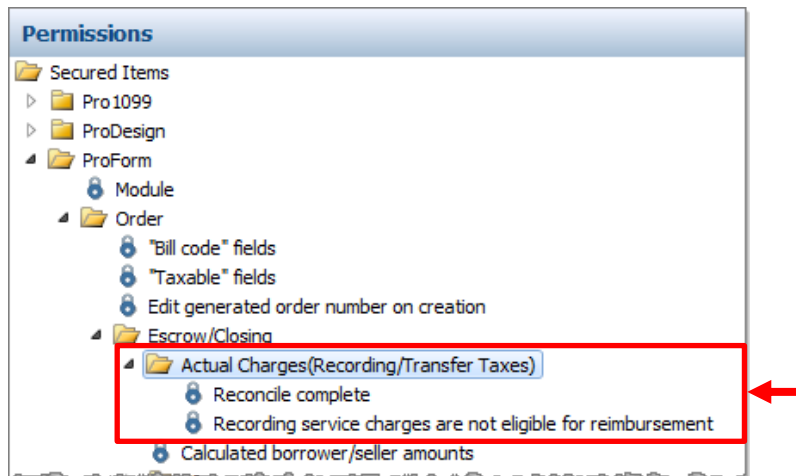
☒ Reconcile complete

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

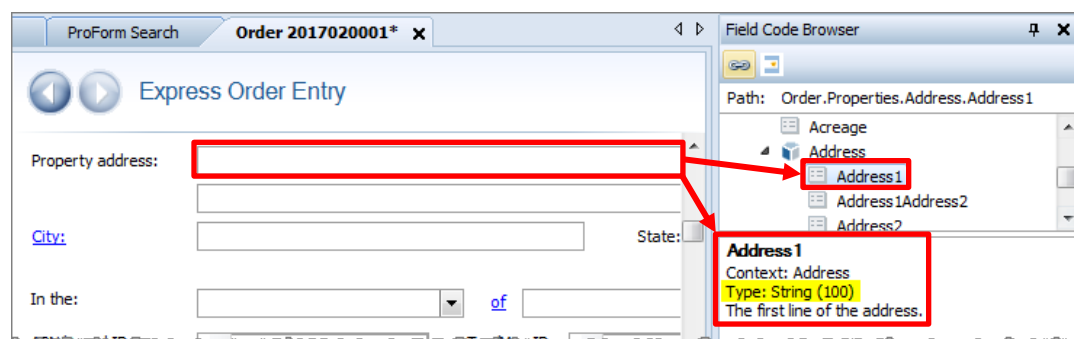
- The application now provides programmatic access to the selected document object within the document and report tree managers. *360090*

4.2.3 (3/17/2017)

ProForm

General

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



Order Numbering

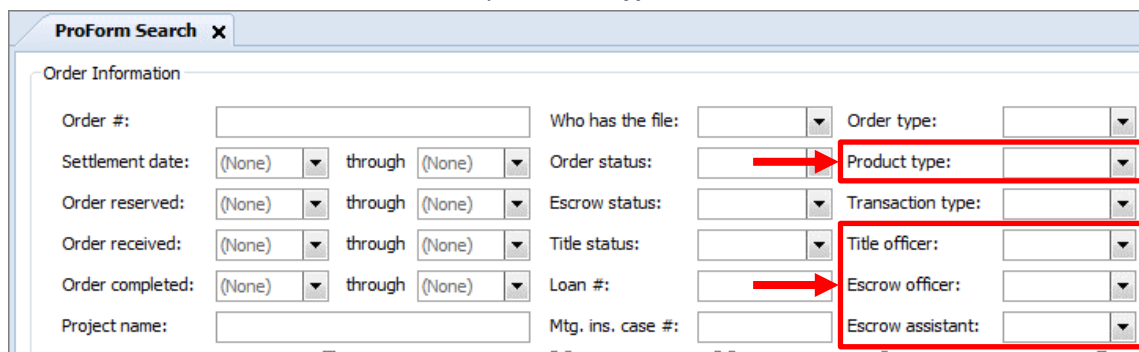
- Orders can no longer be renamed after revenue transactions have been posted. 362807
- Four new—**optional**—fields have been added to display helpful information at the top of every screen within an order. 291774



- 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



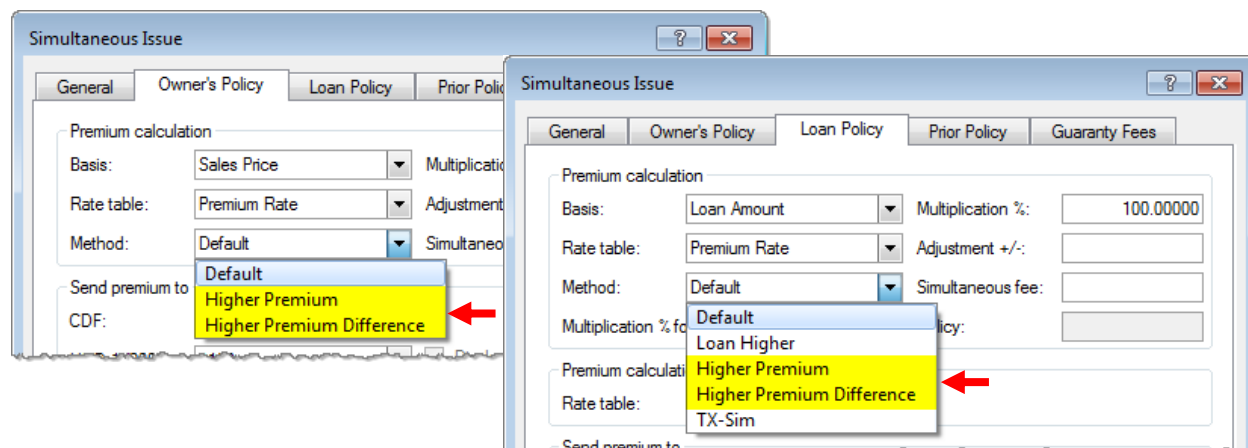
Title

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

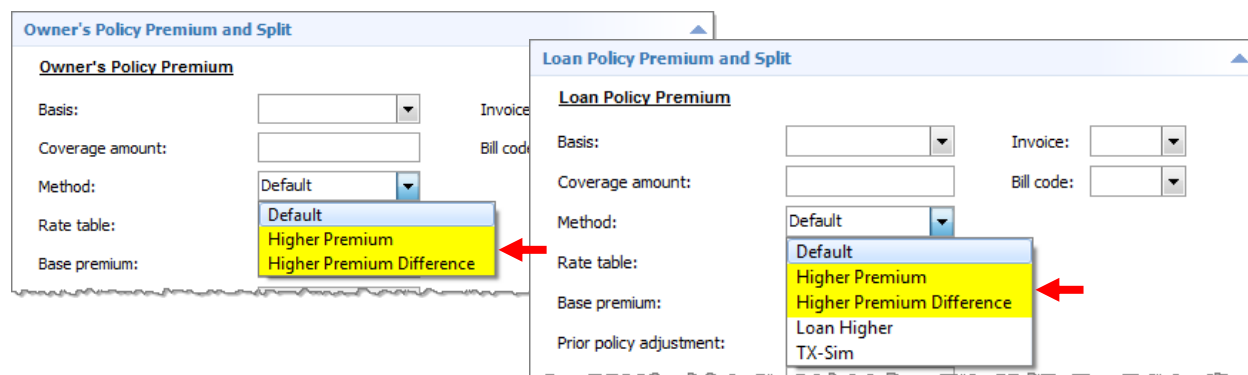
Premium Calculation Methods

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

ProForm Search 1099 Record (1)* x

Information NOT submitted to the IRS

☐ 1099-S furnished to seller ☐ Tax ID solicitation signed Escrow officer/Closer: ☐ 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 person

Continuation of name: Tax ID/SSN:

Seller Proceeds (1099-S)

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

Seller Proceeds & 1099-S

☐ Exclude order from IRS submission

1099-S description:

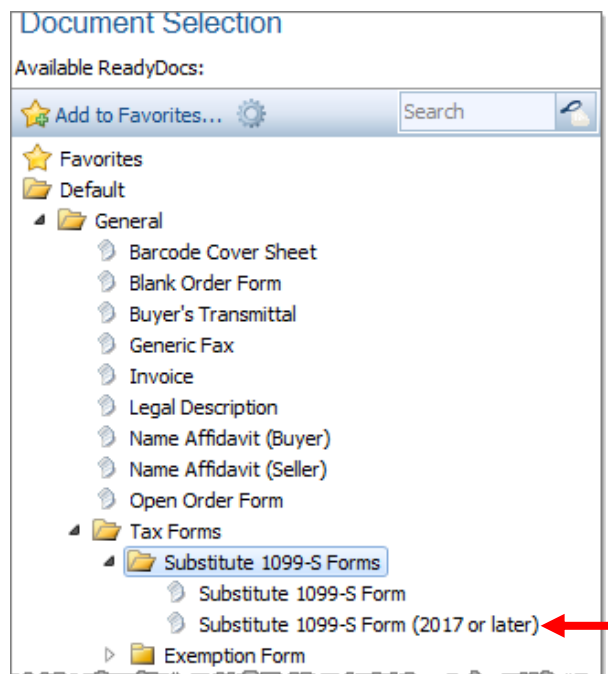
Total cash to sellers: \$500,000.00 Divert seller proceeds to line:

Total buyer's part of real estate 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
		100.00000	\$500,000.00	\$500,000.00	0.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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:

SUBSTITUTE FORM 1099-S PROCEEDS FROM REAL ESTATE TRANSACTIONS FOR THE TAX YEAR: 2017 OMB No. 1545-0997					
SETTLEMENT AGENT/FILER'S NAME AND ADDRESS			Filer's Federal Tax ID Number: Order Number: 2017020001		
SELLER/TRANSFEROR'S NAME AND ADDRESS			Transferor's Federal Tax ID Number:		
1) Date of Closing: 02/09/17	2) Gross Proceeds: 100000.00	4) X here if property or services received:	<div style="border: 2px solid red; padding: 2px;"> 5) X here if foreign person: X </div>	6) Buyer's part of real estate tax: 0.00	
3) Address or Legal Description:					

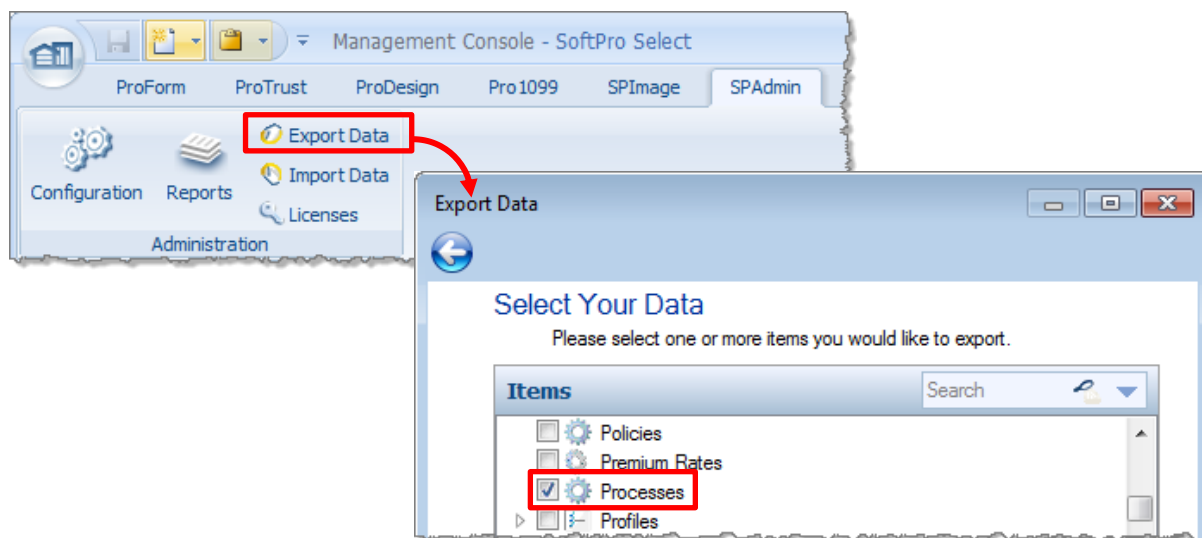
THIS IS IMPORTANT TAX INFORMATION AND IS BEING PROVIDED TO THE INTERNAL REVENUE SERVICE IF YOU ARE

SPAdmin

Tools

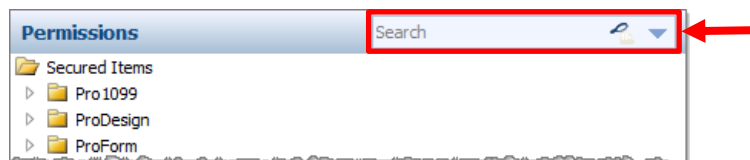
Export/Import

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

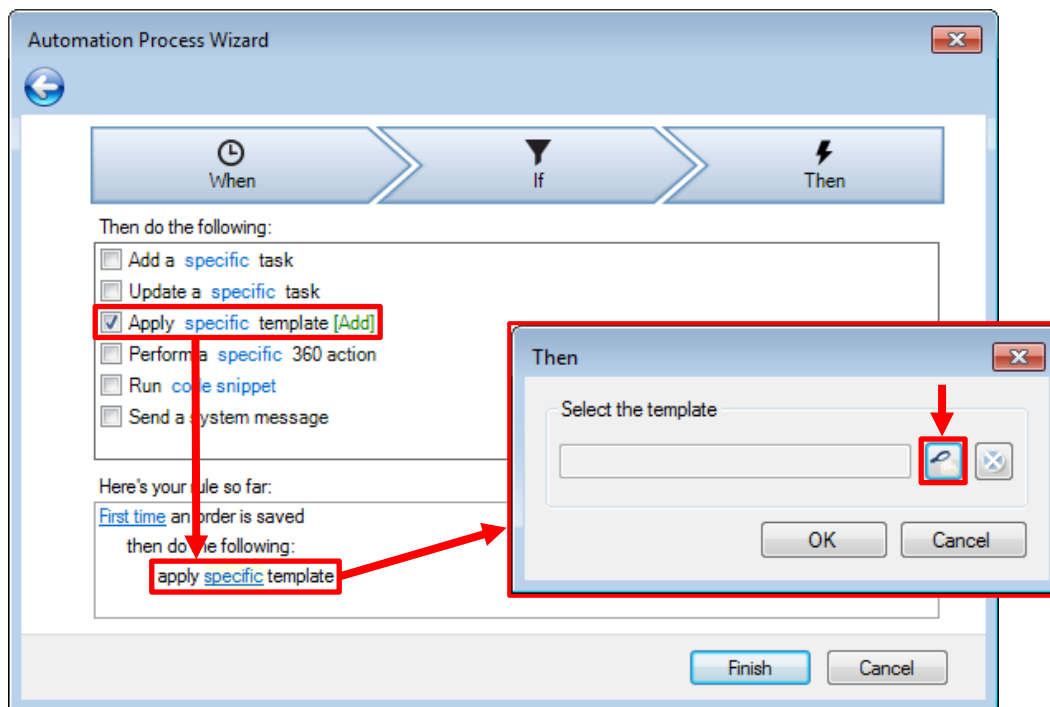
The check printing manager description field was increased to 200 characters. 327963

Automation

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

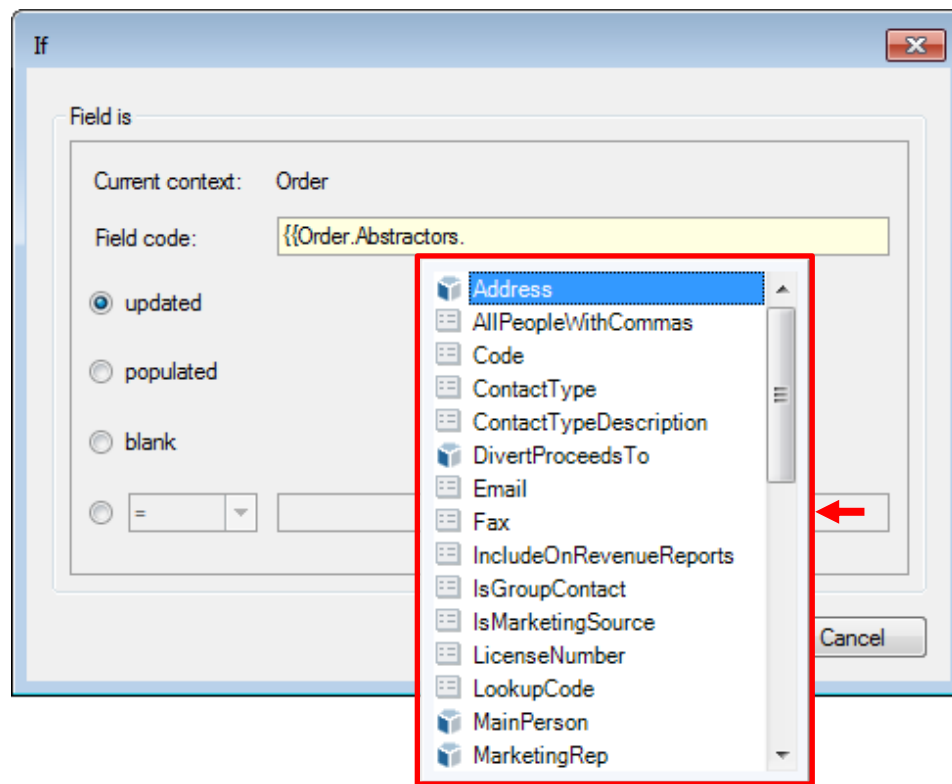
Processes				
Search				
Name	Category	Description	Last Modifie...	Last Modified By
Add Title Search Task	Tasks	Adds a title search task to the order wh...	10/28/201...	Default Admin Accou...
Title-Only Template	Templates	Applies the basic title template if the or...	10/28/201...	Default Admin Accou...

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



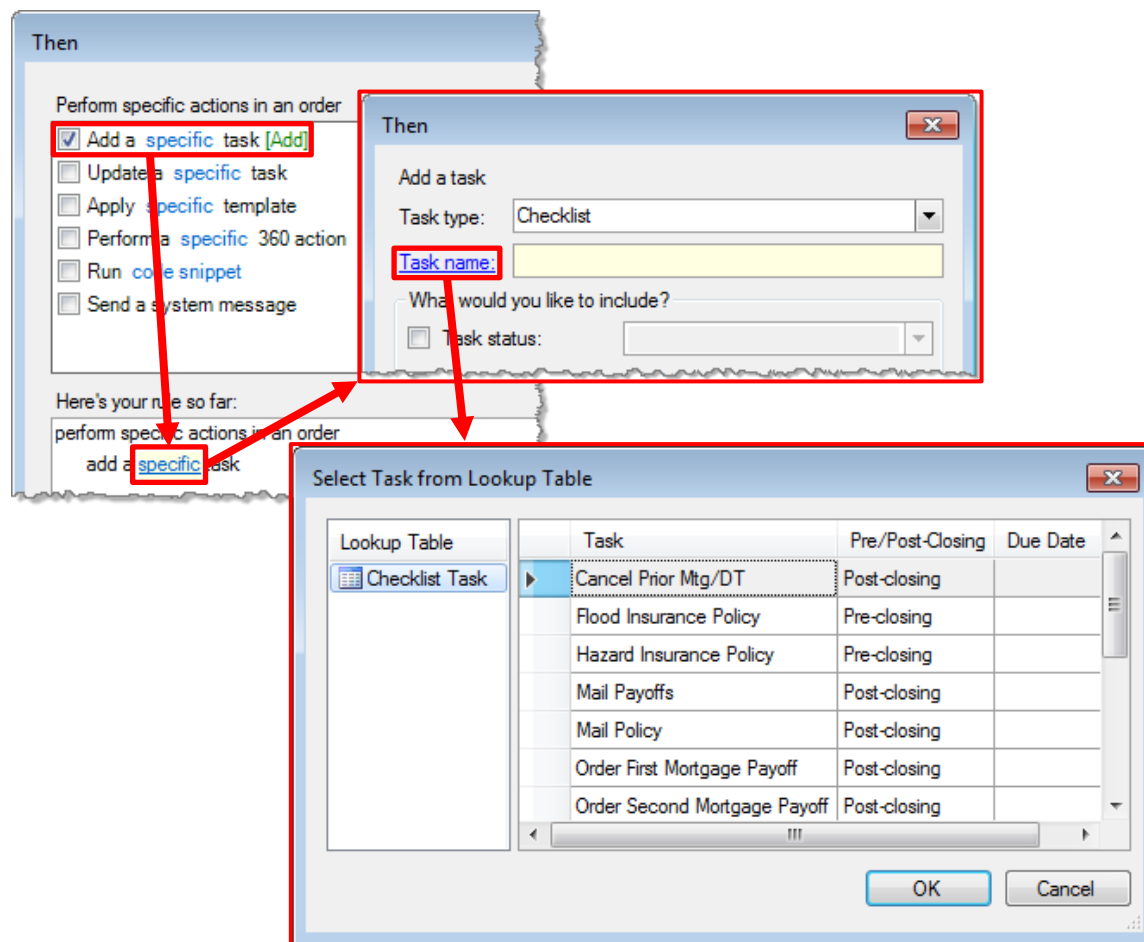
Field Codes

Intellisense has been added to support field code entry. 352337

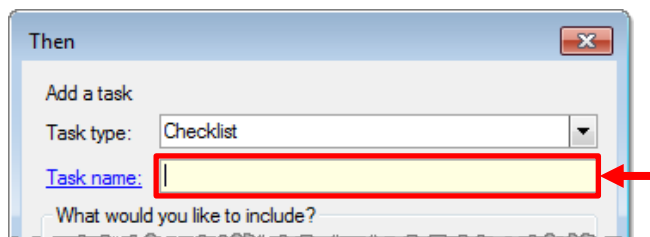


Tasks

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

4.2.3.2 (4/5/2017)

ProForm

API

Integrations were experiencing an order locking issue when opening orders in read-only mode. 377188