SoftPro Select 4.3.57
(4.3.60210.149)

Release Notes |July 27, 2022

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General

Technical

- Functional improvement patches.
- Implemented use of latest version of Visual Studio (2017/2019) *(v4.3.42)*.
- SPS.exe command not reading PIN from registry entry and fails to pass to Select *(v4.3.42)*; *resolved* *60395/61160*
- During installation, entering the PIN or agreeing to enter the PIN is no longer required to complete installation or launch Select Client unless using Select Authentication *(v4.3.42)*.
- Failed to create order error thrown in load test environment when creating an order with a template containing a custom field where the condition evaluates to False *(v4.3.43)*; *resolved* *71006*
- Memory consumption optimization on client and server by ensuring a newer version of the order model is not created with future Select upgrades unless the model is updated *(v4.3.44)*. *69530*
- Unhandled exception error encountered *(v4.3.44)*; *resolved* *73326*
- Select updated to utilize the latest version of Visual Studio 2017/2019 *(v4.3.44)*. *63111*
- Select install removes 360 connection settings *(v4.3.44)*; *resolved* *74561*
- Upgraded the Microsoft .NET Framework used within the Select application to version 4.8 to support TLS 1.2 compliance *(v4.3.45)*. *71017*
- Upgraded the Microsoft .NET Framework included in the Select installation package to version 4.8 to support TLS 1.2 compliance *(v4.3.45)*. *71316*
- Upgraded the Microsoft .NET Framework packaged in the Select SDK to version 4.8 to support TLS 1.2 compliance *(v4.3.45)*. *75077*
- Additional logging added to determine root cause and resolution of IRootEntity *(v4.3.45)*. *77776*
- Installation of release v4.3.44 failed if the same version already existed on the database server *(v4.3.45)*; *resolved* *78640*
- Removed unnecessary duplicate error logging when a user attempts to open an order without the applicable access permission *(v4.3.46)*. *60694*
- Memory leak when in the Guaranty fee section of an order *(v4.3.46)*; *resolved* *77512*
- Improved system cleanup of CefSharp components when the application closes *(v4.3.46)*. *81991*
- Configurable expiration time added on user tokens such that the token must be renewed at expiration limiting the possibility of users remaining active indefinitely within a Select session even if their account has been deactivated *(v4.3.47)*. *50809*
- Crystal Reports Runtime v13.0.28 and MSOLEDBSQL provider included in installation to enable support of TLS 1.2 *(v4.3.47)*. *71310*
- Select server process remains in stopping state while automation is running *(v4.3.47)*; *resolved* *81097*

- Removed forcing the SQL Trustworthy Flag setting to "On" during Select install. The value of the SQL Trustworthy Flag is not altered by Select and Select will run properly regardless of setting *(v4.3.48)*. *66284*
- Chromium Web Browser crash at Select startup *(v4.3.48)*; *resolved* *68064*
- Semantic version number added to the software version number on the SoftPro Select Options > About Select screen (e.g., Version 4.3.60210.48 to 4.3.60210.48 (4.3.15.1)). Updated copyright year 2012 to 2021 *(v4.3.48)*. *85093*
- PDB files now included with the Select installation to improve the ability to troubleshoot application errors *(v4.3.48)*. *88710*
- Enabled Large Address Awareness executable flag. This flag tells Windows that the program can handle more than 2GBs of memory *(v4.3.48)*. *92330*
- Crystal Reports engine spscrhost process memory growing during load test *(v4.3.49)*; *resolved* *93375*

  Crystal Reports Runtime has been reverted to version 11.5 (same as Select versions prior to 4.3.47). If Crystal Reports Runtime version 13 or above is installed, it must be uninstalled prior to installing or upgrading to Select version 4.3.49.
- Index changes required to reduce SQL errors/deadlocks *(v4.3.49)*; *resolved* *93395*

  Non-clustered index added on pfm.Entity table to reduce error and deadlock conditions in certain scenarios.
- Reference for installer project using bin folder instead of Nuget *(v4.3.50.3)*; *resolved* *84743*
- Additional logging added to determine root cause and resolution of Operation Invalid error. *(v4.3.50.3)* *101896*
- New configuration setting added in **SPSCRHost.exe.config** to terminate the Crystal Reports Runtime (SPSCRHost.exe) based on user-specified interval. *(v4.3.50.3)* *107364*

  The **SPSCRHost.exe.config** file contains two properties:

  - **autoShutdownEnabled**
    - The default value of this property is *True*; a value other than True is considered *False*.
    - When *True*, the spscrhost process stops at an interval defined by **autoShutdownLifetime**.
    - When the interval defined by **autoShutdownLifetime** has been reached, the process waits for no user activity and shuts down.
  - **autoShutdownLifetime** – the default value is 60 minutes with a maximum value of 10080 minutes (7 days).

- Memory held and not properly released introduced in 4.3.42 involving changes for Rule Instance/Rule Data *(v4.3.50.3)*; *resolved* *120326*
- Issue in Select that became visible after MS Patches KB5009557 and KB5009546 were released *(v4.3.50.3)*; *resolved* *132912*
- Potential thread locking related to the Crystal Reports host process *(v4.3.50.3)*; *resolved* *137153*
- Mid-tier Select service ending unexpectedly when the Crystal Reports hose is not available

(v4.3.50.3); ***resolved*** *137435*

- Memory issue introduced in 4.3.42 involving changes for Rule Instance/Rule Data *(v4.3.53)*; ***resolved*** *120326*
- Upgrade installation not recognizing a newer document or report bundle; ***resolved*** *72360*
- Issue in Select that became visible after MS Patches KB5009557 and KB5009546 were released; ***resolved*** *132912*
- Select installer now allows for multiple database installations/upgrades to run in parallel. This change affects customers that have stacked sites on a Select mid-tier server. *(v4.3.55)* *87481*
- FNF client-side performance counters not reporting to AppInsights *(v4.3.55)*; ***resolved*** *125777*
- Security vulnerabilities resolved. *(v4.3.55)*

  NOTE: *(v4.3.56.1)* While fixing a security vulnerability, a bug was introduced that does not allow the importing of data from an Excel file in the ".xlsx" format. This issue exists in any area of the Select code where an Excel file can be imported.

  The ability to import exists but the file must be converted to an ".xls" format prior to importing.
- System account not releasing lock on order in escrow lock scenario *(v4.3.56)*; ***resolved***. *27574*
- Two SQL Server Security settings with the same name *(v4.3.56)*; ***resolved***. *121503*

  Renamed "Use Secure Connection" to "Use Secure DB Connection" to avoid confusion.
- Issue with potential thread locking related to the Crystal Reports host process *(v4.3.56)*; ***resolved***. *137153*
- Mid-tier Select service ending unexpectedly when the Crystal Reports host is not available *(v4.3.56)*; ***resolved***. *137435*
- With this release of Select, if any of the following tools are used, please contact SoftPro Support for an updated version of the tool. *(v4.3.56.1)*
  - CrossTiersOrder
  - Custom Screen Builder
  - Screen Extraction Tool
  - Order Tool
  - Ledger Tool
  - Order Extraction Tool
  - Order Restorer Tool

SDK\API\Database Changes

SDK

- Installing the Select SDK will fail with some versions of Visual Studio 2019. *(v4.3.54)*.

  It has been determined that Visual Studio 2019 v16.11.10 or later, must be used for the SDK installation to succeed. This is specific to Visual Studio 2019 and does not apply to Visual Studio 2017 and earlier.

API

- IOrderSearchFields *(v4.3.54)*

  - + bool? IsSubEscrow { get; }
- OrderSearchFields *(v4.3.54)*
  - + const string IsSubEscrow
- PercentBasisType *(v4.3.54)*
  - + LoanCoverage
  - + OwnersCoverage
- IOrderInfo *(v4.3.54)*
  - + bool IsSubEscrow { get; }
- OrderInfo *(v4.3.54)*
  - + bool IsSubEscrow

Order Model API

- CDFDetailCharge *(v4.3.54)*
  - + PayoffAmountTotal as Decimal
- CDFSummaryCharge *(v4.3.54)*
  - + PayoffAmountTotal as Decimal
- CSSCharge *(v4.3.54)*
  - + PayoffAmountTotal as Decimal
- BuyerSellerHUDCharge *(v4.3.54)*
  - + PayoffAmountTotal as Decimal
- CreditDebitHUDCharge *(v4.3.54)*
  - + PayoffAmountTotal as Decimal
- + BalanceDueSection *(v4.3.54)*
  - + GetNewCharge() As SubEscrowCharge
- + DisbursementSection *(v4.3.54)*
  - + GetNewCharge() As SubEscrowCharge
- + PayoffsSection *(v4.3.54)*
  - + CDFPayoffCharges As Set(Of CDFCharge)
  - + CSSPayoffCharges As Set(Of CSSCharge)
  - + HUDPayoffCharges As Set(Of HUDCharge)
  - + IsEmpty As Boolean
  - + Total As Decimal
  - + Type As SubEscrowSectionType
  - + GetNewCharge() As SubEscrowCharge
- + TotalConsiderationSection *(v4.3.54)*
  - +GetNewCharge() As SubEscrowCharge

Database

- pf.OrderInfo *(v4.3.54)*
  - + IsSubEscrow bit
- pf.SearchOrder *(v4.3.54)*
  - + IsSubEscrow bit
  - + IX_SearchOrder_IsSubEscrow nonclustered index
- pt.OrderDetail *(v4.3.54)*
  - + IsSubEscrow BIT
- pt.RevenueDetail *(v4.3.54)*
  - + SubEscrowSection INT
  - + SubEscrowLine INT

- pt.TransactionSplit *(v4.3.54)*
  - + SendToSubEscrow DECIMAL(14,2)
- pt.CanApproveDraw - procedure altered *(v4.3.54)*
- pf.SearchOrderInsert - procedure altered *(v4.3.54)*
- pf.OrderInfoViewInsteadOfInsert - trigger altered *(v4.3.54)*
- pf.OrderInfoViewInsteadOfUpdate - trigger altered *(v4.3.54)*
- RevenueDetailViewInsteadOfInsert - trigger altered *(v4.3.54)*
- pf.OrderInfoView - view altered *(v4.3.54)*
- pt.RevenueDetailView - view altered *(v4.3.54)*
- Stored procedure dbo.SearchOrders removed. *(v4.3.55)*
- New index, *IX_CI_OrderHistory_RootIDVersionBaseVersion* created on pf.OrderHistory. *(v4.3.55)*
- SettlementAgent, TitleCompany, and EscrowCompany columns were added to the following entities *(v4.3.56)*:
  - pf.Ledger table
  - pf.OrderInfo table
  - pf.OrderInfoView
  - pf.TaskInfoView
  - pt.LedgerView
- Changed select statement from top 100 percent to top 1000 *(v4.3.56)*:
  - pf.Myordertaskview

Snap Section

- **SoftPro.OrderTracking.SnapSections.Dialogs.SubEscrowPayoffSectionSelectDialog** *(v4.3.56)*
  - SubEscrowPayoffSectionSelectDialog() - CDF payoffs text changed.
- **SoftPro.OrderTracking.SnapSections.SubEscrow.SubEscrowStatementSnapSection** *(v4.3.56)*
  - Grid_RowsRemove() - event was added to remove an overlapping <Add Row> rectangle after row deletion.
- **SoftPro.OrderTracking.SnapSections.AdditionalTitleChargesSnapSection** *(v4.3.56)*
  - BindTitleChargesGrid() - title grid binding was modified to display Subescrow and CSS line numbers.
- **SoftPro.OrderTracking.SnapSections.EndorsementGridSnapSection** *(v4.3.56)*
  - BindEndorsementList() - endorsement grid binding was modified to display of Subescrow and CSS line numbers.

Third-Party Tools

- Upgraded CefSharp library from version 71.0.2 to version 89.0.170 *(v4.3.48)*
- Newtonsoft.Json.dll upgraded from version 9.0.1.19813 to version 13.0.1. *(v4.3.55)*

  IMPORTANT: Upgrading these libraries has a potential impact to any third-party integrations referencing this common library.
- GDPicture *(v4.3.55)*
  - Upgraded GDPicture.net dll from version 11 to version 14.
- SharpZipLib has been removed *(v4.3.56)*
  - ICSharpCode.SharpZipLib.dll version 0.86.0 removed

- The Excel library that was originally part of this tool is now retrieved from NuGet to always pull the latest.

ProForm

General

- Null reference error when searching a sorted, multi-select lookup table *(v4.3.46)*; *resolved* *61290*
- Custom field drop down does not show up to 100 characters when selected *(v4.3.49)*; *resolved* *85320*

  A tool tip appears when the mouse is hovered over the item showing the entire text.
- A formula removed from a field erroneously re-populates after the order is saved *(v4.3.50.3)*; *resolved* *99157*
- Custom fields not visible on an object immediately after the object is added and causing slow order saves *(v4.3.50.3)*; *resolved* *140363*

Order

- Ability to clear formatted text (copied into Select from email, word, PDF, etc.) to remove special formatting without having to use Notepad *(v4.3.44)*. *56348*

Order Contacts

- Fax number not pulling into Settlement Agent Contact from SPAdmin when the Escrow Officer/Closer selected *(v4.3.42)*; *resolved* *29783*
- License number not pulling into Settlement Agent Contact from SPAdmin when the Escrow Officer/Closer selected *(v4.3.42)*; *resolved* *61276*
- “Unable to save changes” error occurs when attempting to save back-to-back changes to lookup table *(v4.3.46)*; *resolved* *77164*

Property

- Incorrect spelling of *Philippines* in the Country drop-down list *(v4.3.56)*; *resolved* *105016*

Seller Proceeds & 1099-S

- Divert Seller Proceeds entry in a template does not populate when applied to a CSS order *(v4.3.56)*; *resolved* *98517*

Endorsements

- Custom fields not visible when an endorsement added *(v4.3.45)*; *resolved* *79611*
- In limited instances, opening the Endorsement screen while using proxy custom fields returned a ‘Failed to load screen’ error *(v4.3.47)*; *resolved* *88297*
- Custom fields causing slow order saves and not visible on an object immediately after adding the object *(v4.3.56)*; *resolved* *140363*

Notes

- Intermittent "QueryStatus call for command failed" error message due to corrupted note *(v4.3.46)*; *resolved* *61295*

Exceptions & Requirements

- Overlay Order is not numbering Exceptions when Classic order is overlayed, even when title numbering scheme applied *(v4.3.46)*; *resolved* *65060*

CSS

- Infinite loop occurs when statement charges require rounding in the CSS *(v4.3.49)*; *resolved* *14350*

  Added additional internal counter to record events that reach a predefined threshold to effectively troubleshoot future infinite loops.

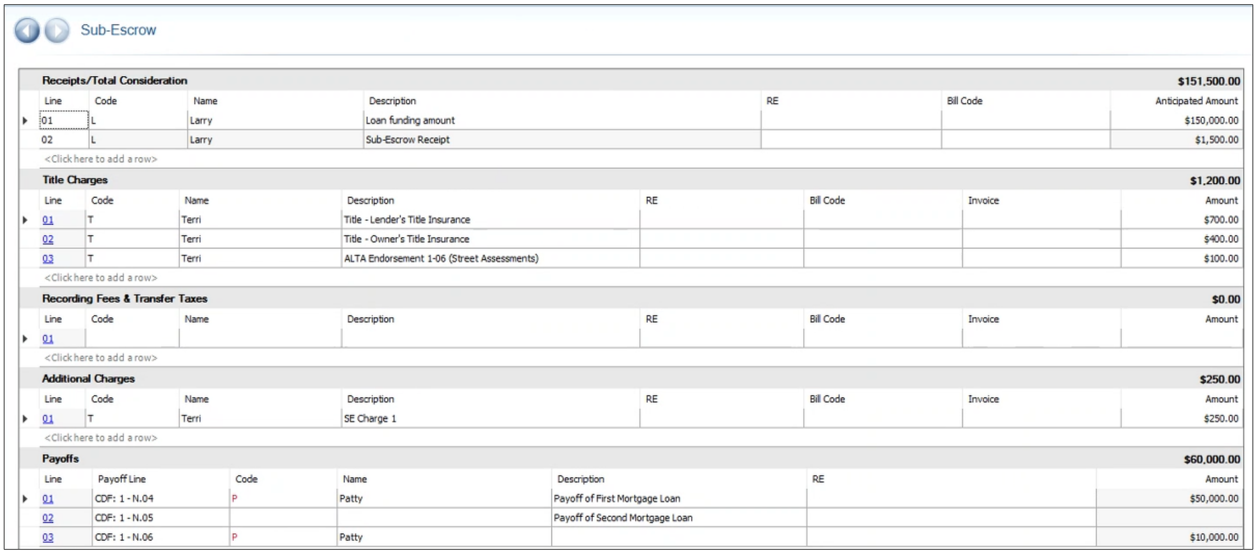
Sub-Escrow

- Released milestone 1 of new Sub-Escrow feature. *(v4.3.51)* This milestone includes:
  - New Sub-Escrow check box on the Express Order Entry screen.
  - Creation of the Sub-Escrow screen.
  - User permissions for Sub-Escrow check box and Sub-Escrow screen.
  - Ability to add new receipts and charges on the Sub-Escrow screen.
  - Ability to see receipts and charges entered on the Sub-Escrow screen in the Order Transaction screen and the Register.
- Released milestone 2 of new Sub-Escrow feature. *(v4.3.52)* This milestone includes:
  - Ability to send charges to the Sub-Escrow screen from the,
    - Additional Title Charges screen
    - Title Insurance Premiums screen
    - Endorsements screen
- Released milestone 3 of new Sub-Escrow feature. *(v4.3.53)* This milestone includes the ability to:
  - Create a receipt in the Register and send it to the Receipts/Total Consideration section of the Sub-Escrow screen.
  - Copy the Sub-Escrow data when using the Apply Template feature.
  - Create the following documents:
    - Billing Statement and Sub-Escrow Instructions
    - Sub-Escrow Instructions
    - Sub-Escrow Settlement Statement

Sub-Escrow Functionality *(v4.3.54)*

Sub-escrow orders are transactions needed to ensure a clear title. Because these order types only deal with title-related fees, certain rules are required, and the order must be designated as a sub-escrow order. To alleviate the need for formulas and templates, a new **Sub-Escrow** screen has been added.

This functionality is available for CDF, HUD-1 and CSS order types.



Sub-Escrow

Receipts/Total Consideration — $151,500.00

Line	Code	Name	Description	RE	Bill Code	Anticipated Amount
01	L	Larry	Loan funding amount			$150,000.00
02	L	Larry	Sub-Escrow Receipt			$1,500.00
<Click here to add a row>						

Title Charges — $1,200.00

Line	Code	Name	Description	RE	Bill Code	Invoice	Amount
01	T	Terri	Title - Lender's Title Insurance				$700.00
02	T	Terri	Title - Owner's Title Insurance				$400.00
03	T	Terri	ALTA Endorsement 1-06 (Street Assessments)				$100.00
<Click here to add a row>							

Recording Fees & Transfer Taxes — $0.00

Line	Code	Name	Description	RE	Bill Code	Invoice	Amount
01							
<Click here to add a row>							

Additional Charges — $250.00

Line	Code	Name	Description	RE	Bill Code	Invoice	Amount
01	T	Terri	SE Charge 1				$250.00
<Click here to add a row>							

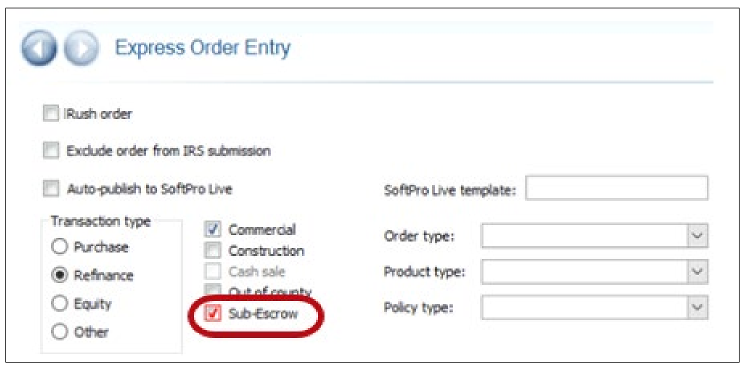
Payoffs — $60,000.00

Line	Payoff Line	Code	Name	Description	RE	Amount
01	CDF: 1 - N.04	P	Patty	Payoff of First Mortgage Loan		$50,000.00
02	CDF: 1 - N.05			Payoff of Second Mortgage Loan		
03	CDF: 1 - N.06	P	Patty			$10,000.00

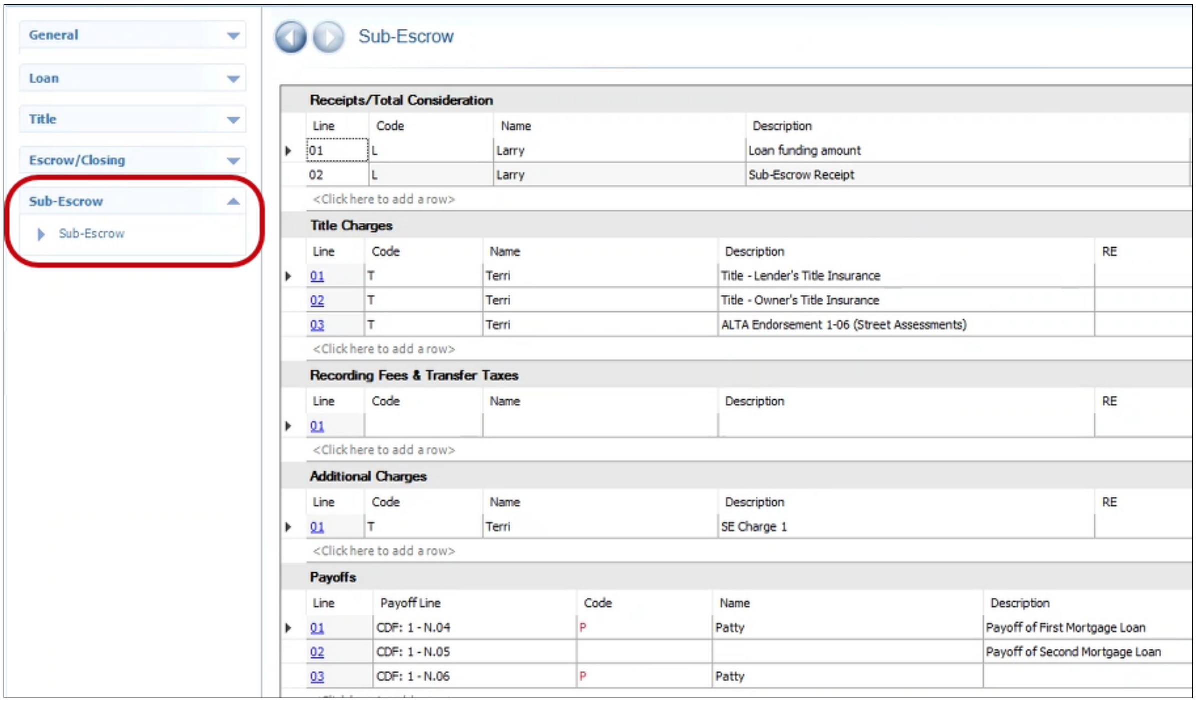
NOTE: Use of the Sub-Escrow screen and accompanying features is available when permission is granted via SPAdmin.

When the permission is granted, the **Express Order Entry** screen shows the,

- **Sub-Escrow** check box



- The **Sub-Escrow** section is active allowing access to the **Sub-Escrow** screen.



Order Type

Designating an order as a Sub-Escrow Title only transaction, changes the behavior of the program to accommodate the need to only deal with title only charges.

- The sales price and/or loan amount can be entered but is not sent to the CDF, HUD-1, or CSS line when Title only.
- The ability to send charges to the **Sub-Escrow** screen from existing Select screens (e.g., Additional Title Charges, Title Insurance Premiums, etc.) including the Register.

  NOTE: Selecting an **Order Type** other than **Title only** prevents the ability to send charges to the **Sub-Escrow** screen.
- Sub-escrow charges (including payoffs and transfer taxes) can be entered on the **Sub-Escrow** screen with any order type when the **Sub-Escrow** check box is checked on the **Express Order Entry** screen.
- A Sub-escrow Settlement Statement can be generated versus a CDF, HUD-1, or CSS.
- Receipts and disbursements generated from the CDF, HUD or CSS are suppressed on the **Order Transactions** screen.

Sub-Escrow Screen

When the **Sub-Escrow** option is checked, the Sub-Escrow screen is accessible in the **Sub-Escrow** section.

The **Sub-Escrow** screen is only active when permission is granted, and the order is identified as a **Sub-Escrow** on the **Express Order Entry** screen.

Each sub-escrow section provides the user the ability to manually enter values, insert values via a formula or use a calculation window to establish a value (the **Receipts/Total Consideration** section does not allow the use of the calculation window).

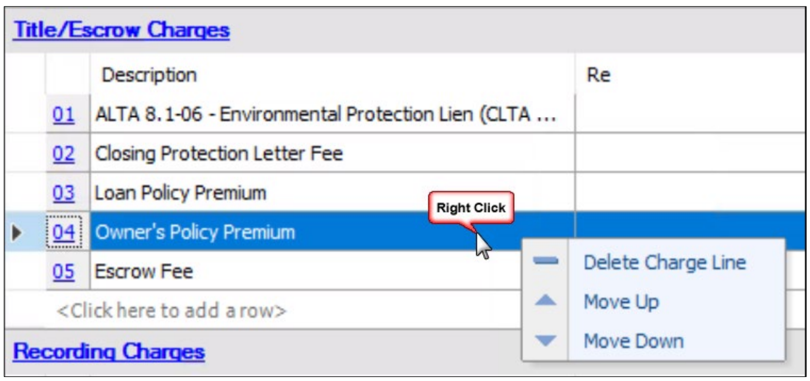
The **Sub-Escrow** screen provides a grid format with the ability to,

- Add a row using the **<Click here to add a row>** link
- Delete a row – right click on the entry to be removed and select **Delete Charge Line** from the menu

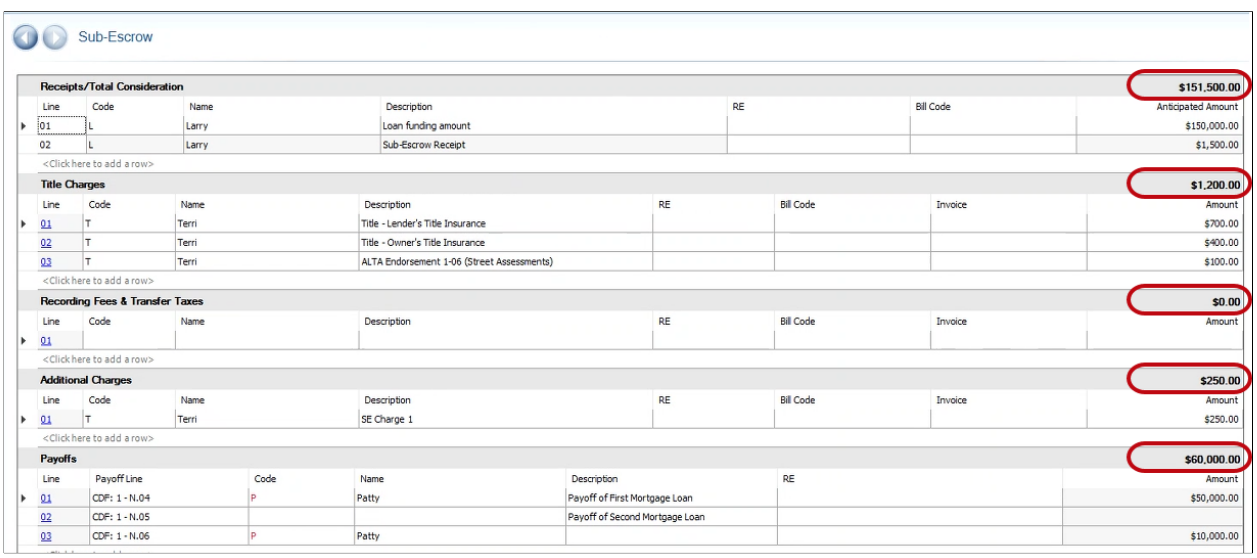
  NOTE: An entry cannot be removed if it originated on another screen (i.e., endorsement fee sent from the Endorsements screen)

- Move an entry up/down in the same section - right click on the entry to be moved and select **Move Up** or **Move Down** from the menu.

  NOTE: This is not available in the **Payoff** section.



The title bar of each section (i.e., Receipts/Total Consideration, Title Charges, etc.) shows a subtotal for that section based on the entries within the grid below it.



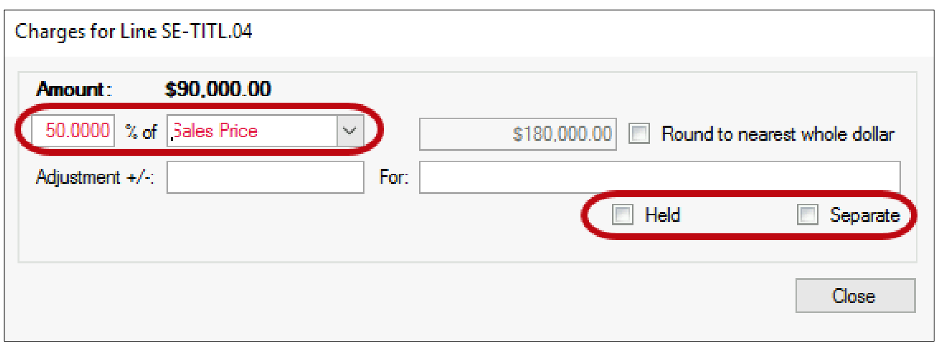
Receipts/Total Consideration

- Only positive values can be entered.

- The calculation window is not used in this section.
- The **Receipts/Total Consideration** is considered an anticipated amount and is labeled accordingly.

The **Title Charges**, **Recording Fees & Transfer Taxes** and **Additional Title Charges** sections allow,

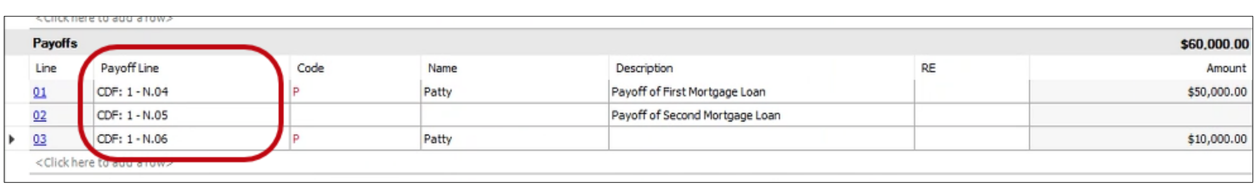
- Negative and positive values to be entered.
- The use of the calculation window in these sections.
  - The calculation window is accessed by clicking the Line number link and does not include the Details, Payor and Payees tabs.
  - The calculated amount can be overwritten manually.
  - The calculation can be re-enabled by clearing the manual entry with the **F2** key.
  - The calculation defaults to **% of Other** in the drop-down. Additional fields supported are,
    - Loan amount
    - Sales price
    - Loan Coverage amount
    - Owner's Coverage Amount
    - Loan Premium
    - Owner's Premium
    - Other



- Line entries can be set as **Held** or **Separate**.

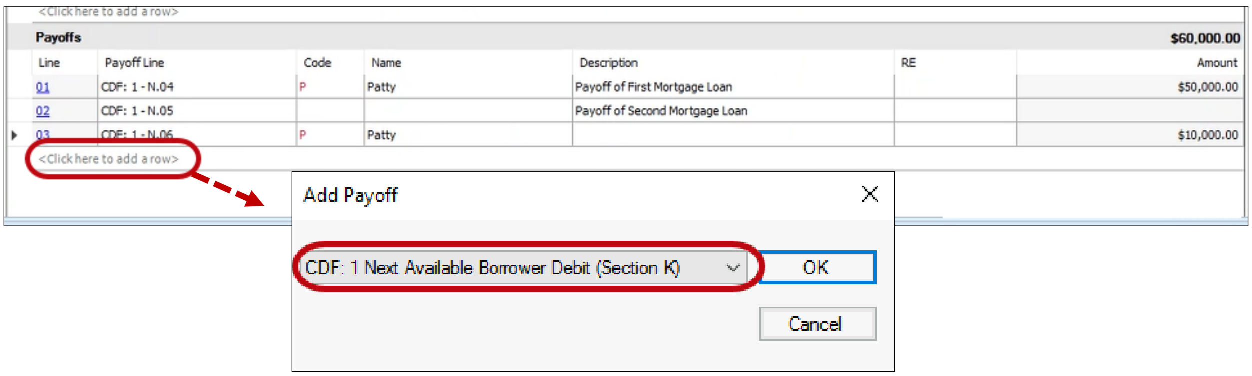
Payoffs

- The lines in this section are linked to the Payoff detail in the Settlement Statement.
- An additional **Line** field identifies which CDF/HUD/CSS line the payoff is associated with.

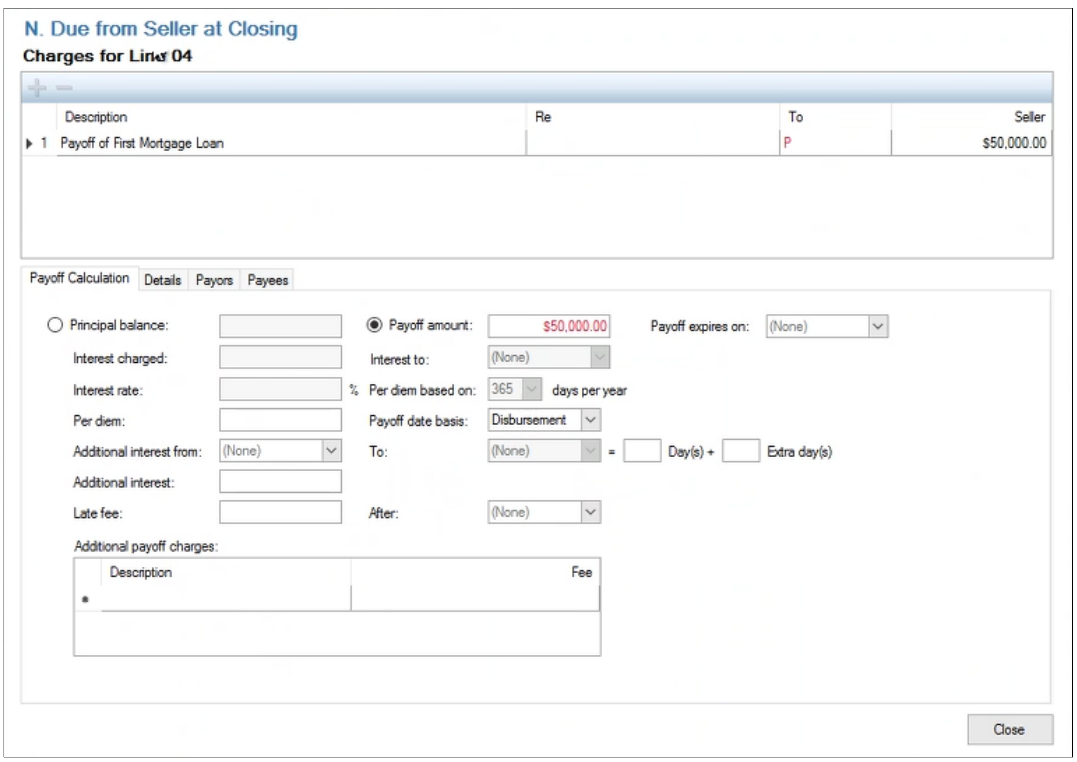


- When a new line is added to the **Sub-Escrow** screen > **Payoff** grid, a CDF/HUD/CSS line must be associated with the payoff.

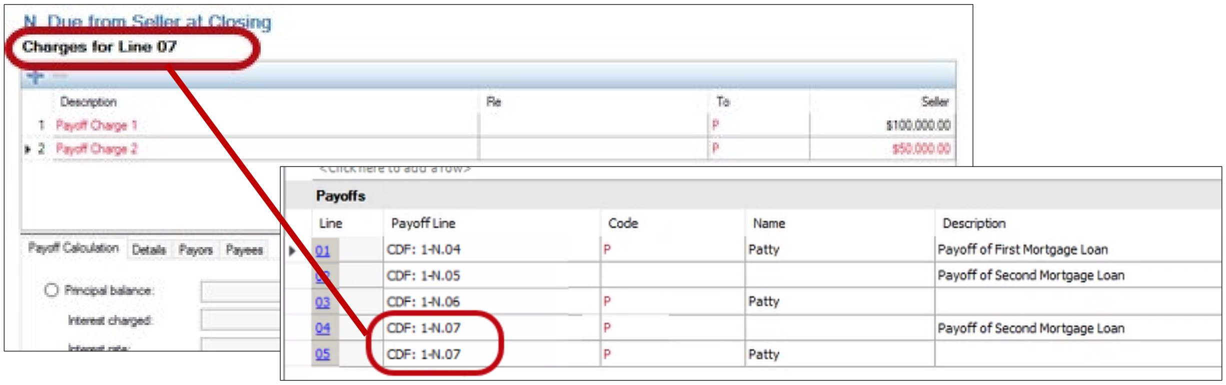
The Payoff calculation window utilizes the existing functionality from the Settlement Statement (HUD, CDF, CSS).



The Payoff calculation window opens once the line is associated.



- A settlement statement can have one line with multiple payoff charges; each payoff appears as a separate line on the Sub-Escrow screen with the same line assigned.



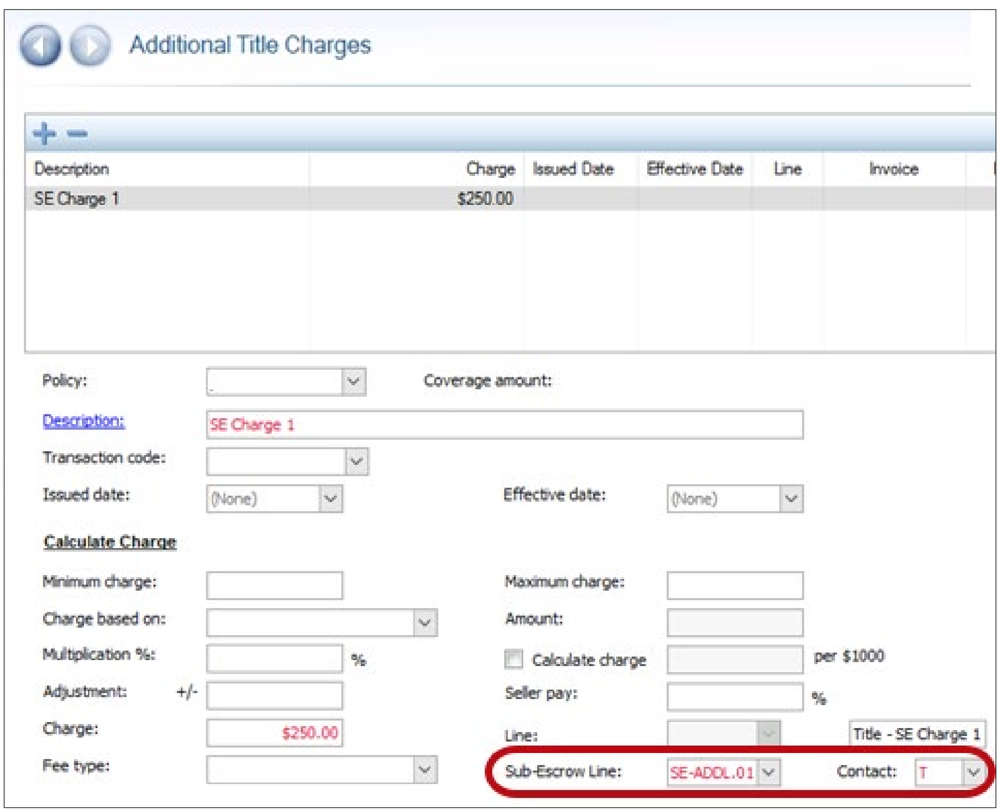
- When a payoff is changed or removed in **Sub-Escrow**, the CDF/HUD/CSS automatically reflects the update.

Send to Sub-Escrow Charges

Fees sent to the **Sub-Escrow** screen can be set up at the template level. This provides a user the ability to create an order from a template for any order type, have the Sub-Escrow check box on the Express Order Entry screen checked by default, and have certain fees automatically sent to Sub-Escrow.

Two new fields have been added to support this,

- **Sub-Escrow Line** designates the section and line number where the charge appears on the Sub-Escrow screen.
- **Contact** designates the Payee/Contact Code for the charge.



By selecting the **Sub-Escrow Line** and **Contact** from their respective drop-downs, the charge is sent to the **Sub-Escrow** screen.

These new fields are available on the following screens.

- **Additional Title Charges**
- **Title Insurance Premiums**
- **Endorsements**
- **Loan Information & Funding**; This screen does not have the new **Contact** field as it uses the **Loan funding provided by** field.

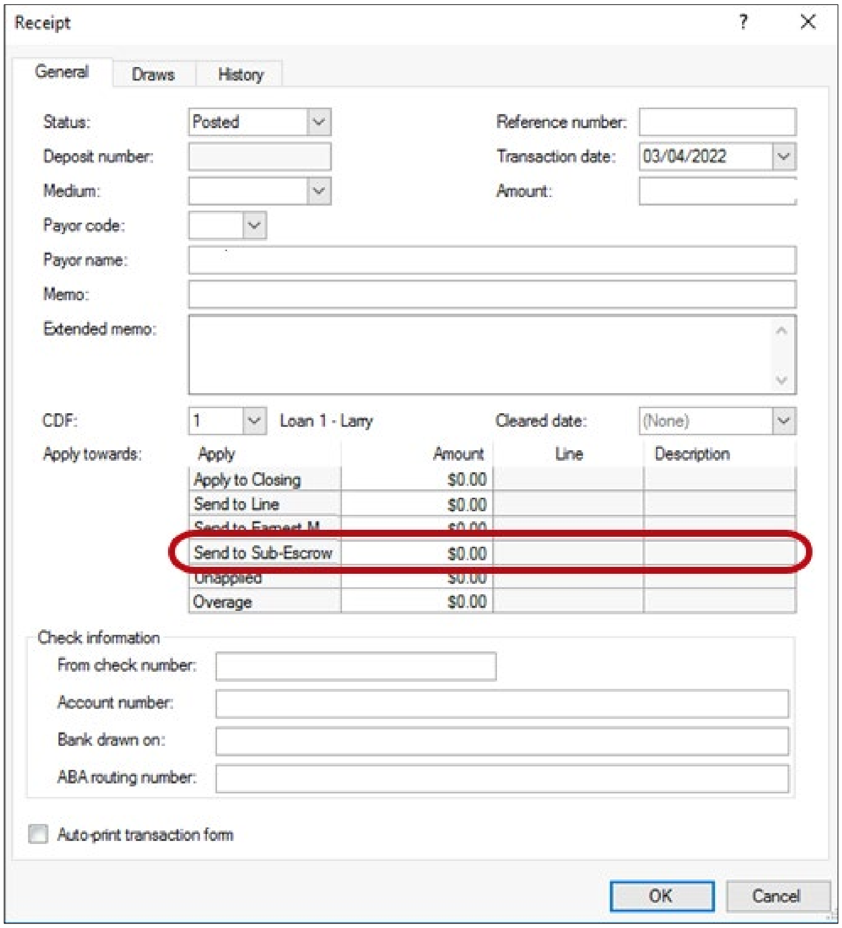
Using the Sub-Escrow Line and Contact fields

- A user must have been granted **Edit Sub-Escrow** screen permission in SPAdmin.
- The **Sub-Escrow Line** field,
  - only visible if the Profile preference for the Profile on the order has Sub-Escrow enabled.
  - does not automatically populate with a default value when the Sub-Escrow check box on the Express order Entry screen is checked.
  - is only active when the Sub-Escrow checkbox is checked in **Express Order Entry** screen and the **Order Type** is set to **Title only**, and read-only otherwise.
- The **Taxable** check box is ignored when a sub-escrow line is selected.
- Splits cannot be defined for a sub-escrow line.
  - The split section becomes read-only when a Sub-Escrow Line is selected.
  - If split information is entered and a sub-escrow line selected, the split information is cleared, and fields become read-only.
- Data must be removed from the Sub-Escrow Line (excluding payoffs) if an order is to be changed from a Sub-Escrow order to a non-Sub-Escrow order. This must be done prior to unchecking the **Sub-Escrow** check box on the **Express Order Entry** screen to avoid a validation error.

Register

To allow funds received to appear on the **Sub-Escrow** screen, a new entry, **Send to Sub-Escrow**, has been added to the **Apply Towards** grid for the following transaction types:

- Incoming Wire
- Interest Credit
- Miscellaneous Credit
- Receipt
- Ledger Transfer (in and out)

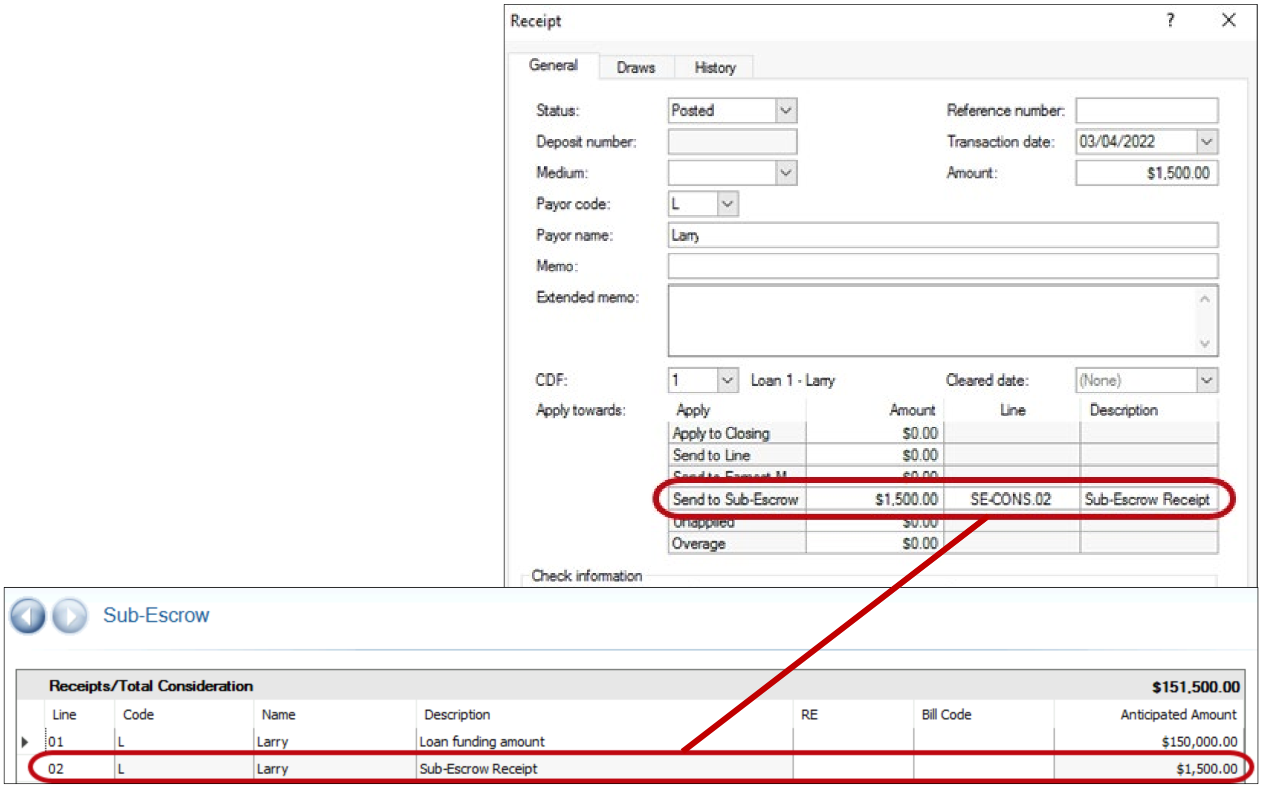


This new entry is always visible but is read-only if,

- The Profile Preference is not enabled for Sub-Escrow.
- The Sub-Escrow check box is not checked on the Express Order Entry screen.
- The user does not have Edit Sub-Escrow permissions granted.

Using the Send to Sub-Escrow field

- Only positive values can be entered in this field.
- The entry is written to the next available blank line in the **Receipts** grid of the **Sub-Escrow** screen when a transaction is posted.
- The **Receipts** grid line becomes read-only. Any needed edits to this entry must be done in the Register (originating screen) versus on the **Sub-Escrow** screen > **Receipts** grid.



Documents

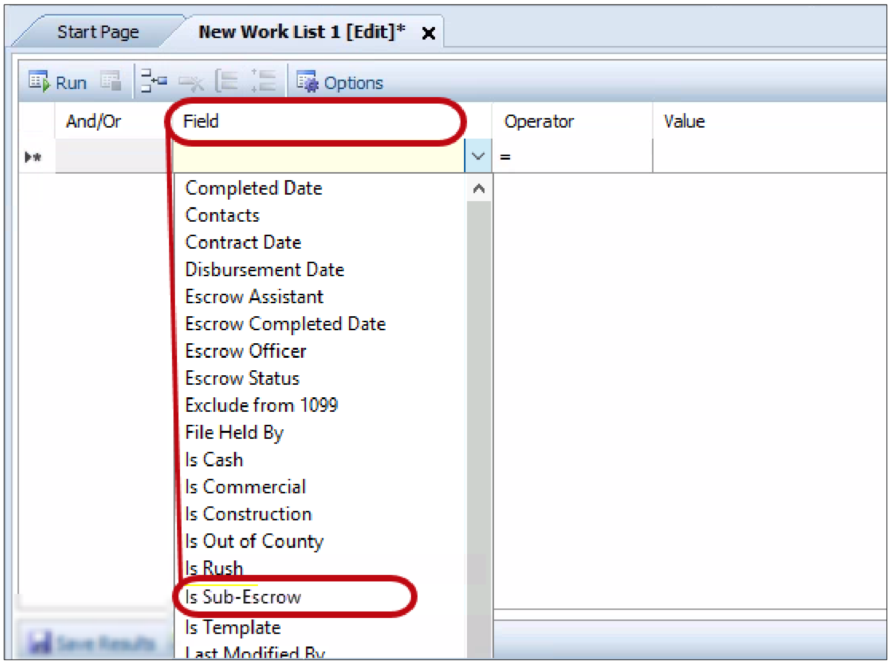
With the new Sub-Escrow feature, new documents and reports are available.

- **Billing Statement and Sub-Escrow Instructions**: this is a combined document used to communicate order details and acts as a memo bill.
- **Sub-Escrow Instructions**: used to communicate order details.
- **Sub-Escrow Settlement Statement**: used to communicate funds being delivered (or if there is a shortage) to the outside escrow company

Work Lists

The **Is Sub-Escrow** entry has been added in the **Field** drop-down to allow for the creation of a query to view Sub-Escrow orders in **My Work Items** via the **Work Lists** query editor.

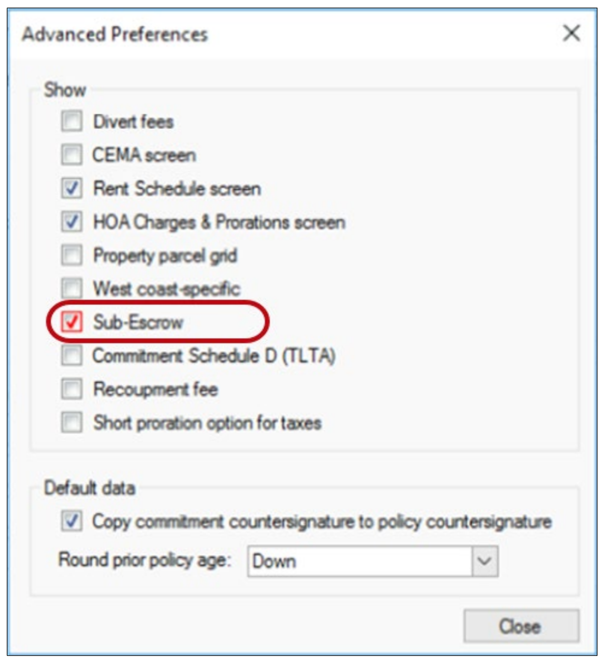
Selecting **Field = Is Sub-Escrow** and **Value = True** provides results where the **Express Order Entry** screen > **Sub-Escrow** check box is checked.



Granting Permission to Sub-Escrow

Permission is granted for a given profile in **SPAdmin Profiles > Order Tab > Advanced Preferences**.

The default setting is unchecked.



When the **Show > Sub-Escrow** check box is,

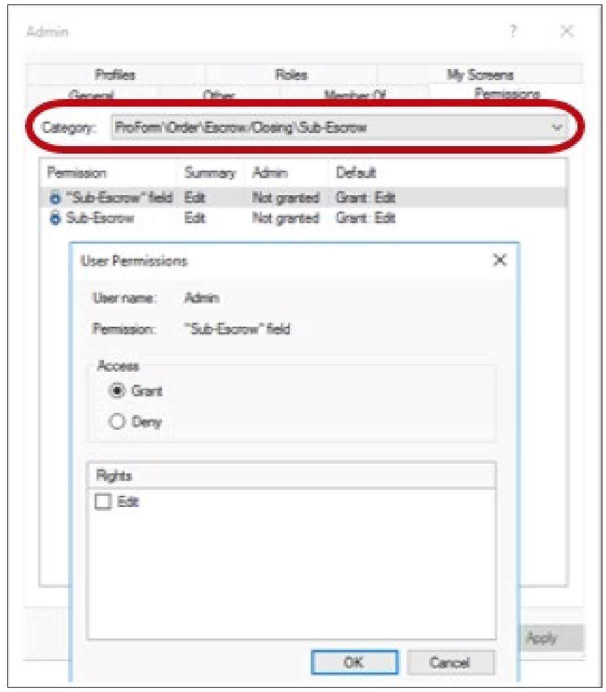
- Checked
  - The **Express Order Entry** > **Sub-Escrow** check box is active.
  - The sales price and loan amounts are not sent to the settlement statement when the **Express Order Entry** > **Sub-Escrow** check box is checked, and the **Order type** is **Title only**.

- Unchecked
  - The **Express Order Entry** > **Sub-Escrow** check box shows as read-only
  - The **Sub-Escrow** screen is not visible

User Permission to Sub-Escrow

The Sub-Escrow permission provisions View and Edit rights to a user with respect to the Sub-Escrow check box and screen. This is set in **User > Permissions > Category = Sub-Escrow**.

NOTE: The **Administrators** group has edit rights by default to the Express Order Entry screen > Sub-Escrow check box and the Sub-Escrow screen.



- When a Sub-Escrow charge has a blank contact or a balance, additional messaging is displayed citing the line or balance affected. *(v4.3.56) 109684*

  Example Sub-Escrow messaging:

  - Payee contacts are blank and required on line(s): *[line cited]*
  - Payee contacts are blank and required on Sub-Escrow line(s): *[line cited}*
  - Payor contacts are blank and required on Sub-Escrow line(s): *[line cited]*
  - Sub-Escrow has a balance of ($xx,xxx.xx) Dollars.
- A confirmation message displays when a transaction is deleted, voided or updated in the Register. The message displayed is: *The transaction sent money to Sub-Escrow line. This information will be removed.* *(v4.3.56) 125015*
- Additional Title Charges screen and the Endorsements screen do not show the sub-escrow (or CSS) charge line in the summary grid *(v4.3.56)*; *resolved* *125461*
- In the Payoff grid, Totals section overlaps second <Click here to add a row> entry *(v4.3.56)*; *resolved* *129130*
- .SubEscrowLine Data Type is integer in a Lookup Table and it should be text *(v4.3.56)*; *resolved* *133508*

- Inability to save a Sub-Escrow order if the Sub-Escrow edit rights are denied and the Sub-Escrow order is Title Only *(v4.3.56)*; ***resolved*** *133630*
- If an amount is manually entered in a CSS order on SE-CONS.01, and a second loan amount is entered on the Loan Information and Funding screen, the sum of the manual entry and the second loan amount is erroneously populated as the second loan amount on the Order Transactions screen *(v4.3.56)*; ***resolved*** *135656*
- Only items in the Order Transactions and the Register should appear on the Order Balance Sheet for CSS, HUD-1 and CDF orders *(v4.3.56)*; ***resolved*** *135669/136376/136377*
- Validation error displayed when there is a negative amount in Additional Title Charges or Title Insurance Premiums screens and endorsements selected in a Sub-Escrow Title only order and the line is populated through a Lookup Table *(v4.3.56)*; ***resolved*** *135694*
- Suppress loan funding amount validation against the Order Transaction funding amount and disable corresponding Warning message when not in balance. *(v4.3.56)* *135933*
- “Nullable object must have a value” error appears on save after moving lines up or down in the Sub-Escrow Receipts and Total Considerations grid *(v4.3.56)*; ***resolved*** *138368*
- Send the Final owner's premium and Final loan premium to Sub-Escrow screen *(v4.3.56)*. *141682*
- When a transaction is posted via API to disburse to revenue ledger, Select does not populate the debited pt.Transactioin RelatedTranaction column with the credited transaction corresponding to the revenue ledger transaction and an error message is not displayed *(v4.3.56)*; ***resolved*** *143020*

Register

- Versioning and watermark columns added to Integration default tables to accommodate third-party integrations *(v4.3.42)*. *58083*
- Register delay when posting title fees. Progress bar added to show processing *(v4.3.44)*; ***resolved*** *59527*
- Added the Transaction “Medium” type to the Available Receipts grid on the Group Deposits screen *(v4.3.49)*. *44619*
- Using the Reload Receipts button on the Group Deposits screen causes a modified grouped receipt to appear twice *(v4.3.49)*; ***resolved*** *88524*

Construction Draws

- Reimbursement draw changes not honoring the new SPAdmin permission for Requires Secondary Approval *(v4.3.50.3)*; ***resolved*** *127732*
- Reimbursement error updated to show last person to add, update or delete a reimbursement cannot approve draw. *(v4.3.50.3)* *129282*
- Construction Draw reimbursement changes not honoring the new SPAdmin permission setting of “Requires Secondary Approval” *(v4.3.50.4)*; ***resolved*** *127732*
- Construction Draw reimbursement error updated to show last person to add, update or delete a reimbursement cannot approve. *(v4.3.50.4)* *129282*

Documents

- Saving a document with hyperlinks to PDF format modifies the hyperlink *(v4.3.42)*; ***resolved*** *16377*
- Barcode not rendering properly in HTML documents *(v4.3.56)*; ***resolved*** *81228*
- Document prompt dialog not wrapping when longer than the dialog box size *(v4.3.56)*; ***resolved*** *85116*
- Ability added to simultaneously select multiple documents in the Document Selection screen using the Add > Existing Attachment feature. *(v4.3.56)* *118253/118254*

Attachments

- Moving a document from one Attachment subfolder to another causes an error *(v4.3.56)*; ***resolved*** *47234*

Order History

- New Index for Order History Table to resolve order write regression. *(v4.3.55)* *102869*

Order Search

- Search function not retrieving a newly created order intermittently *(v4.3.44)*; ***resolved*** *58581*

Reports

- Functionality added to render SSRS reporting on the client server to improve scalability and agility within Select. No change to user experience when inputting report parameters or report output *(v4.3.44)*.

Worklist

- Added "Settlement Type" as a searchable field in Order Work Lists *(v4.3.49)*. *52611*

  NOTE: For orders created prior to upgrading to version 4.3.49, the order must be edited and saved before the new searchable field is available.

- Blank/empty values were not returned when searching for Contacts in Order Work Lists *(v4.3.49)*; ***resolved*** *52613*
- Date field variables added to Process Instances Work Lists to account for these dynamic dates: @PreviousWeekStart, @PreviousEndOfWeek, @CurrentWeekStart and @CurrentEndOfWeek *(v4.3.49)*. *52618*
- When creating a Work List, an error occurs when using any field that has a drop-down *(v4.3.55)*; ***resolved*** *48435*
- Work List columns auto-resize to accommodate contents. *(v4.3.56)* *52612*
- Work Lists are grouped by their Source in the Work List tree display. *(v4.3.56)* *52626*
- The Title Company, Escrow Company, and Settlement Agent contacts added as defaulted to show in the Work List Results and as a sortable column in the Results window. *(v4.3.56)* *52636*

My Tasks

- My Tasks list can now be sorted by Due Date. *(v4.3.56)* *90761*

ProTrust

- Incorrect transaction data provided on second negative post in an order *(v4.3.46)*; *resolved* *42131*

  Issue occurred when a second negative charge added to the same line as the first negative charge and an additional positive charge appears on a separate line. ProTrust did not generate the expected Extended memo description for any negative charge when posted.

- New setting, ChangeTrustAccountOnLedgers, added to SPSSVC.EXE.CONFIG to enable changing the SQL CMD Timeout when changing large trust account ledgers. Default set to 30 seconds *(v4.3.47)*. *81381*
- Errors caused due to import of IBA interest credit *(v4.3.48)*; *resolved* *81478*
- A user with proper permission is now able to enter and post one or more IBA interest amounts in the IBA Interest Credits screen even when the ledger associated with the order is locked *(v4.3.48)*. *83757*
- The new default sort order on the IBA Interest Credits screen is by Account Number, sorted lowest to highest. Once interest is added and posted to an order, the processed order is removed from the list and the refresh sorts the remaining orders as noted above *(v4.3.48)*. *83758*
- If the IBA Interest Credits and the Import IBA Interest screens are open when a user changes their profile, both tabs close when a user clicks “Yes” on confirmation window *(v4.3.48)*. *83759*

Pro1099

- Update for tax year 2020 without running SQL script *(v4.3.44)*.
- Select Installer package updated for tax year 2021 to avoid having to run SQL script *(v4.3.49)*. *94584*
- Updated IRS submission file format to include changes for the 2021 tax year for new installs and updates. *(v4.3.56)* *127686*

SPImage

- Some barcode separator sheets skipped during import *(v4.3.47)*; *resolved* *81447*

  BestQuality option in GDPicture enabled in file import process to alleviate skipped separator sheets.

- Order numbers with various lengths not importing when scanned *(v4.3.55)*; *resolved*. *61407*

SPAdmin

General

- A “could not execute query” error displays when performing a search in a new Lookup Table. *(v4.3.56) 148574*

Profile Properties

- When changing Profile properties with a new Lookup Table assignment, the users see the original Lookup Table not the new. A trigger was added to update the lookup table assignment within 15 minutes of the change being made *(v4.3.48)*; *resolved* *91123*
- A new preference added under the SPAdmin>Security>Profiles>Accounting tab>Construction Draws, labeled ‘Require Secondary User Approval’. This new preference defaults to checked. If unchecked, the last person who edited the draw can also approve the draw, provided they have draw approval permission *(v4.3.49)*. *64768*

Permissions

- User permissions denied in a group profile for the Attachments folder not overriding permissions granted for the same user set in another group profile *(v4.3.57)*; *resolved* *41990/141958*
- The Restricted Attachments Folder permission, when not explicitly granted, prevents a user from assigning or removing users and groups to any folder *(v4.3.57)*; *resolved* *141960*

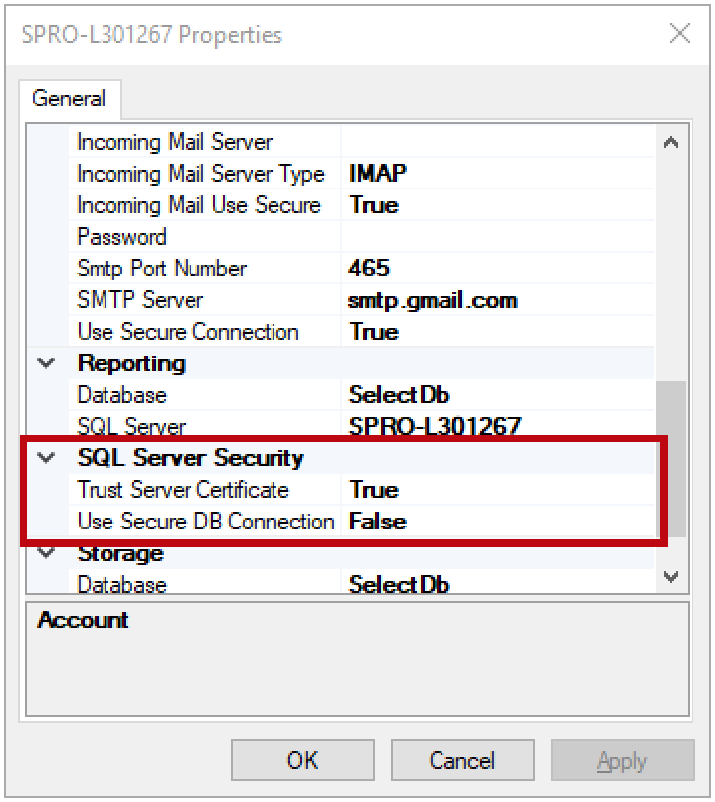
Installation

SQL Server: Encrypting Data-In-Transit *(v4.3.46)*

In Select versions 4.3.46 (4.3.60210.130) and 4.6.14 (4.6.14-ivy20220113r1), two new server pool settings were added to enable encryption of data-in-transit between the Select mid-tier server and the SQL server. These two new settings are in the *SelectConfigDb.dbo.Setting* table.

To access these new settings, open SoftPro Select Services and open the Properties dialog of a given mid-tier server instance. The settings will be visible and editable under a new category, "**SQL Server Security**":

Trust SQL Server Certificate (default value=**True**)
Use Secure DB Connection (default value=**False**)



NOTE: These settings are used when building the connection string that establishes the connection between the Select mid-tier and SQL servers. If the S**QL Server Configuration Manager > Force Protocol Encryption** is set to **Yes**, the settings are ignored and all traffic with the SQL Server is encrypted.

Use Secure DB Connection	**Trust Server Certificate**	**Result**
False	**True** or **False**	Select Server starts successfully. No encryption occurs on data in-transit. When **Use Secure Connection** is False, the connection will be unsecure, and the **Trust Server Certificate** value is ignored. The exception to this is described in NOTES above when **Force Protocol Encryption** is set on the SQL server.
True	**True**	Server starts successfully. Data in-transit encryption occurs. Encryption occurs when both Use Secure Connection and Trust Server Certificate are enabled because we are trusting the server certificate which is created by SQL Server at startup.
True	**False** (No certificate installed on SQL Server)	The Select server will not start and the below message will appear in the Event Viewer:

Use Secure DB Connection	Trust Server Certificate	Result
		SoftPro Select Server failed to start! Error: A connection was successfully established with the server, but then an error occurred during the login process. (provider: SSL Provider, error: 0 - The certificate chain was issued by an authority that is not trusted.)
True	**False** (Certificate installed on SQL Server)	Select server starts successfully. Data in-transit encryption occurs.

True/True scenario - If a certificate is installed, it is used. If not, the default SQL certificate is used. This certificate is internal and not in the certificate store. This is not considered very secure.

True/False scenario - A certificate must be installed in the certificate store. It can be either a self-signed certificate or a certificate issued by a certificate authority.

NOTE: If using a Secure DB Connection, there is one other config file that must be changed manually in order to have ALL Select traffic encrypted.

In file spscfgsvc.exe.config add Encrypt=True to the XML node connectionString.

<!-- SoftPro Select Configuration -->

<softpro.select.config>

<connectionString value="Data Source=AP-QI0CJBG7ETOS;Initial Catalog=SelectConfigDb;Integrated Security=True Encrypt=True "/>

<baseAddress value="net.tcp://AP-QI0CJBG7ETOS:9292"/>

</softpro.select.config>

Encryption and Certificates

If **Use Secure Connection** setting is set to **True** in the server settings, certificates are required. There are three options for SQL Server Certificates:

- Use the built-in SQL Server certificate
  - This applies to the True/True combination option in the table above.

- Self-signed certificate
  - This applies to the True/False combination option in the table above.
  - This is not as secure as using a CA Certificate (see the section below *Creating Self-Signed Server Certificates* for more information).

- » Additional details can be found at Microsoft (https://learn.microsoft.com/en-us/azure/active-directory/develop/howto-create-self-signed-certificate)

- ➢ Certificate issued by a Certificate Authority (CA)
  - » This applies to the True/False combination in the table above.
  - » This is the most secure option for encrypting data in-transit.
  - » Customers are responsible for obtaining and managing the certificates on their servers.
  - » Additional details can be found at Microsoft (https://learn.microsoft.com/en-us/azure/active-directory/develop/howto-create-self-signed-certificate)

Certificate Configuration Requirements

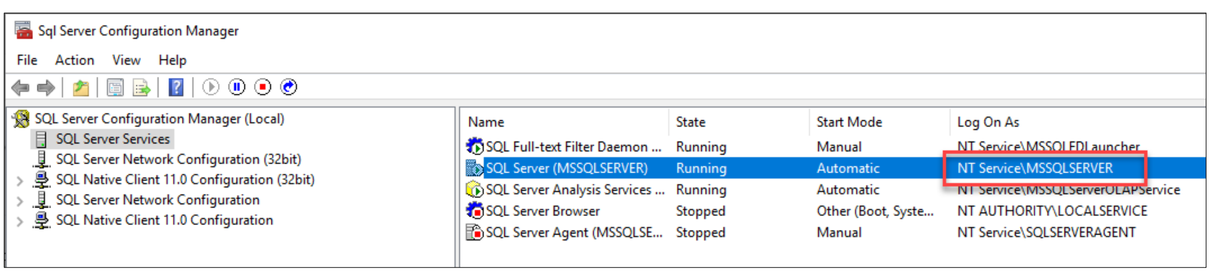
The following information assumes two certificates with the following names and descriptions:

- ➢ **SPS SQL Server Encryption Certificate** - the TLS certificate bound to the SQL Server instance to support encryption.
- ➢ **SPS Root CA Certificate** - the Root certificate used to sign the TLS certificate to the chain.

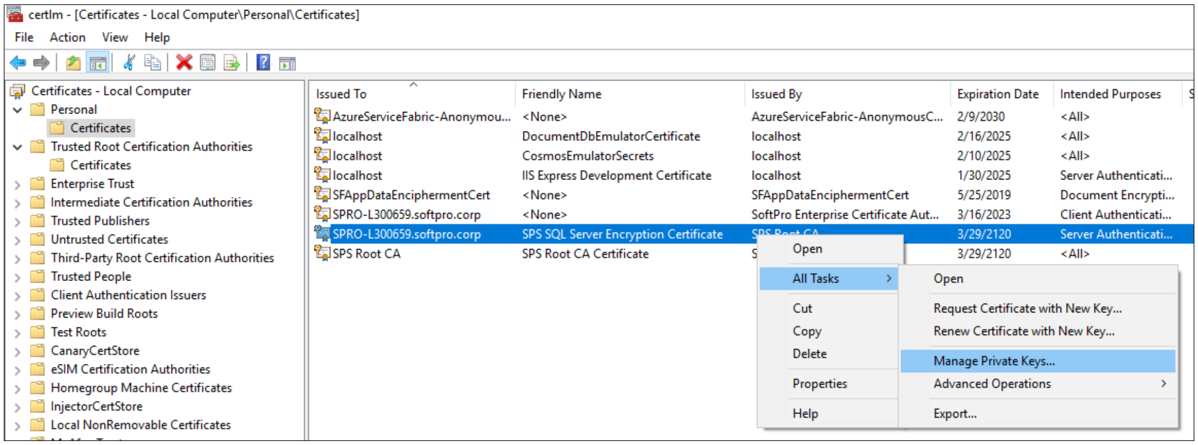
Note: In a typical production scenario, two certificates are created because the TLS certificate that contains the private key used for cryptography is not distributed to each client. The client (in our case, the mid-tier server machine) is only required to possess the Root certificate used to sign the server TLS certificate. If the Select Server (mid-tier) and SQL Server are installed on the same VM, two certificates are not needed.

Install Certificates

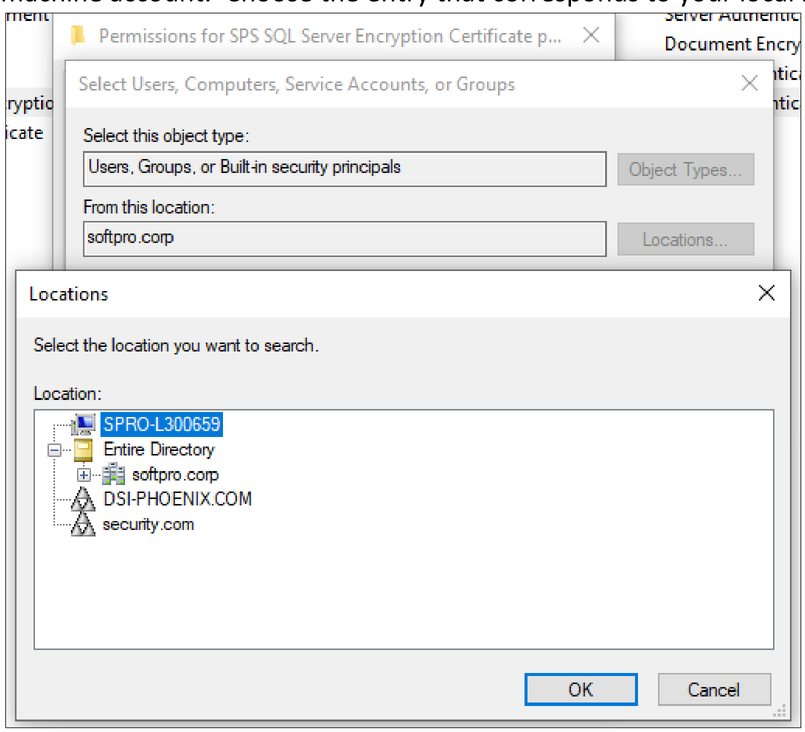
1. Install your certificates as directed by the certificate authority or instructions of your self-signed certificate.
2. Open the **SQL Server Configuration Manager**; note the user account that runs the **SQL Server Services**.



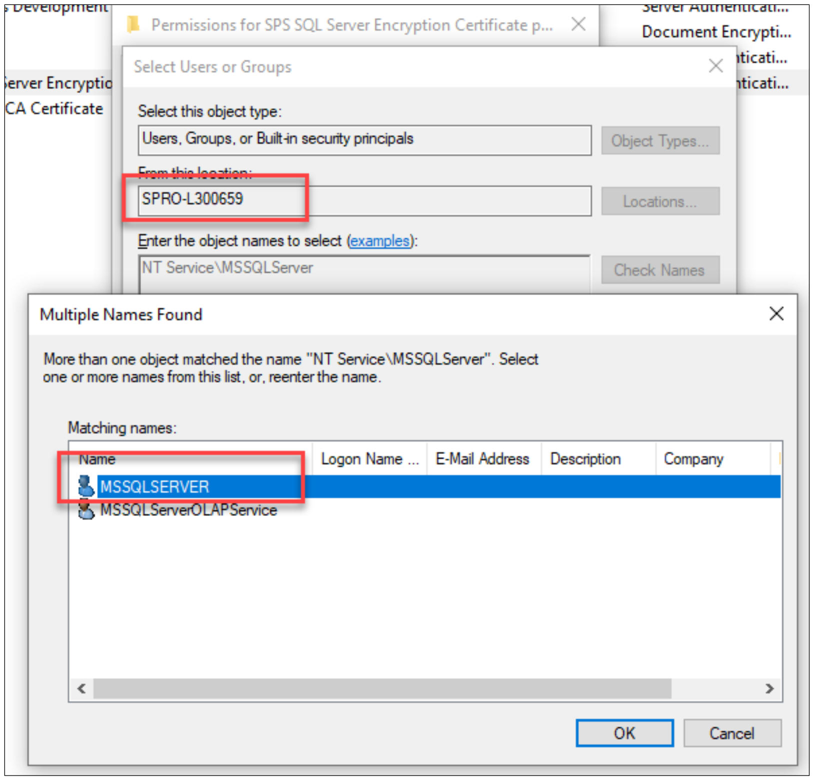
3. Open the Local Machine's Personal certificate store (certmgr.msc), right-click the **SPS SQL Server Encryption** certificate.
4. Select **All Tasks > Manage Private Keys** option; this opens a dialog that shows users/groups who have access to the private key of the certificate.



5. Choose the location from which to pick the SQL Server's user account listed in **step 2** above, this is usually a local machine account. Choose the entry that corresponds to your local machine.

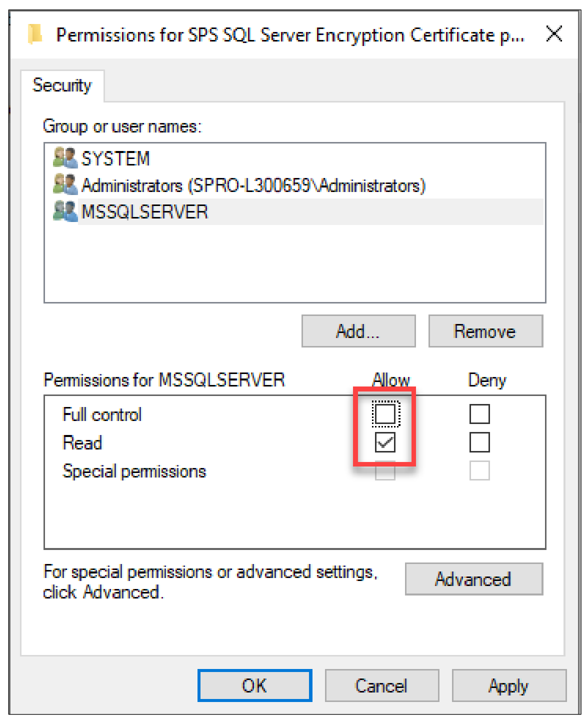


6. Locate and select the SQL Server service account



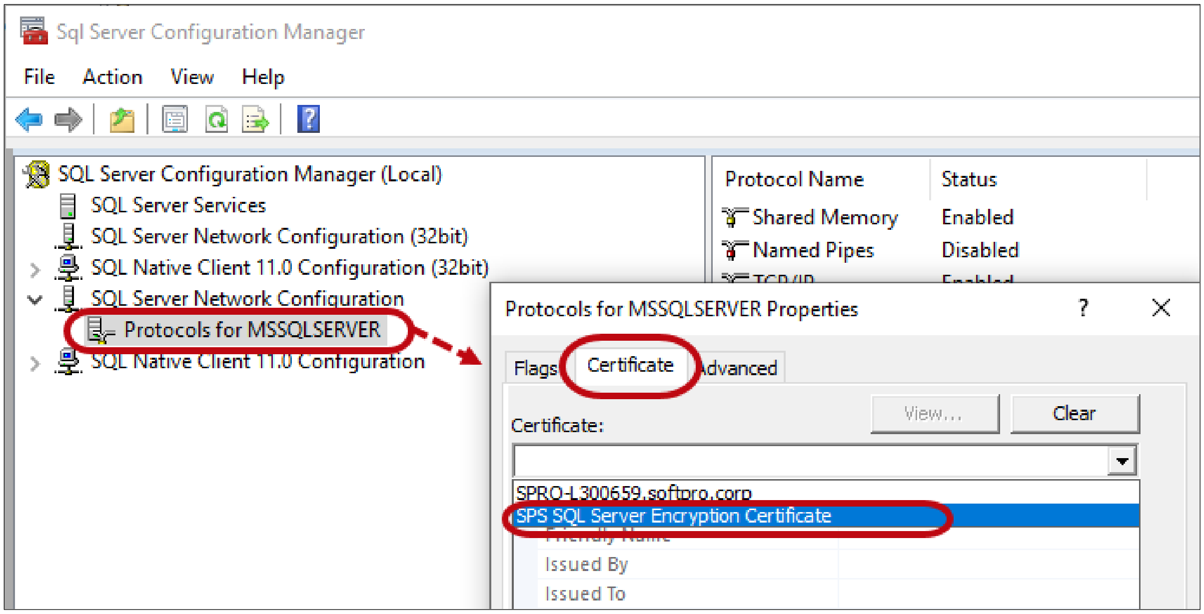
From the **Permissions** window,

7. Uncheck **Allow Full control**
8. Check the **Allow Read**
9. Click **OK/Apply** and close the dialog

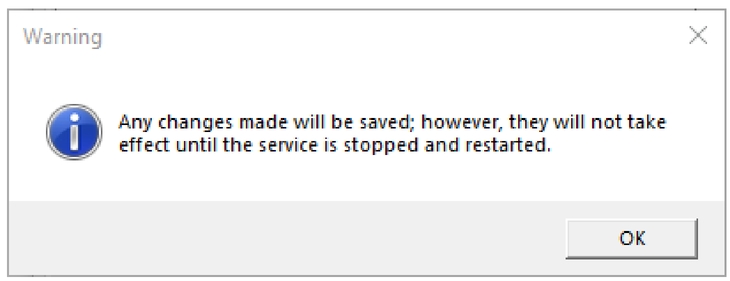


10. Open the **SQL Server Configuration Manager** and navigate to **SQL Server Network Configuration**
11. Open the properties dialog **Protocols for MSSQLSERVER**
12. From the drop-down, select the **SPS SQL Server Encryption Certificate**

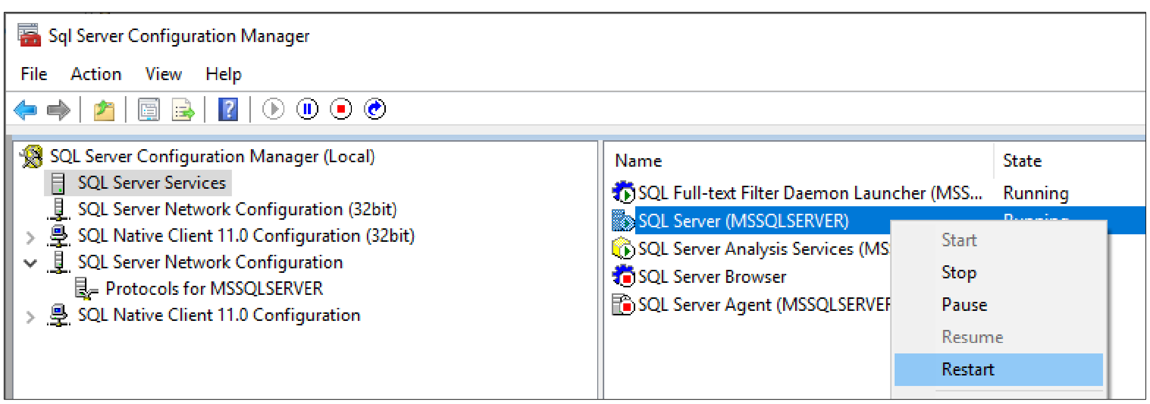
13. Click the **Apply** button



A message displays confirming the changes made are saved and will not take effect until the service is stopped and restarted. Click **OK** to continue.



14. Restart the **SQL Server Services** on the machine.



Verification of Data In-Transit Encryption

To verify the encryption,

1. Open **SQL Server Management Studio**

2. From the **Options > Connection Properties** tab, check the **Encrypt connection** option
3. Connect to SQL Server and run the query:

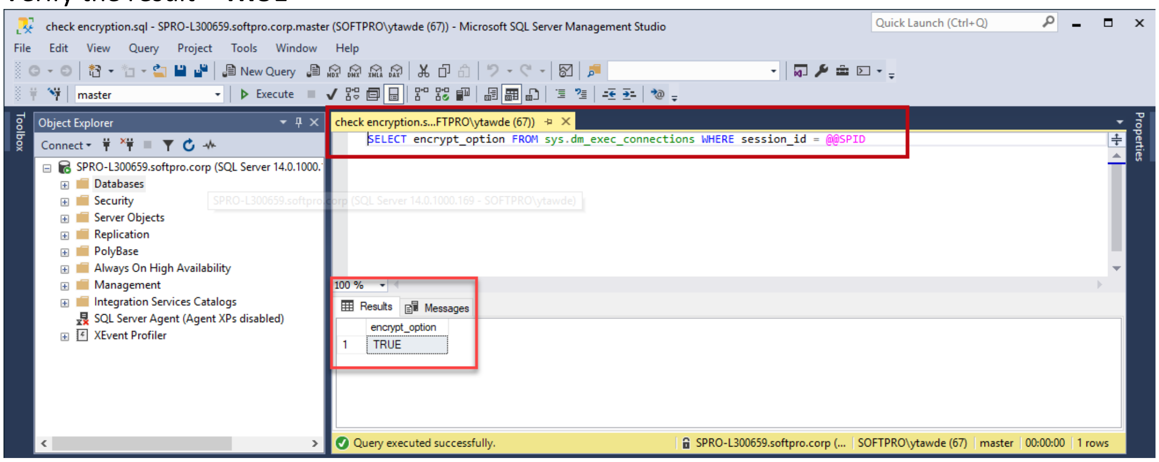
   SELECT encrypt_option FROM sys.dm_exec_connections WHERE session_id = @@SPID

   NOTE: To view the encryption option for all connections, run the query:

   SELECT session_id, encrypt_option FROM sys.dm_exec_connections

The query shows encryption on the specified session.

4. Verify the result = **TRUE**



<u>Important Notes Regarding Select Versions</u>

- SoftPro Select v4.3.45 and 4.6.13 include an upgrade to Microsoft .NET Framework 4.8 which is require for encryption of TLS 1.2 traffic.
- SoftPro Select v4.3.46 and 4.6.14 include the addition of the two new setting (**Trust SQL Server Certificate** and **Use Secure Connection**), allowing for the encryption of TLS 1.2 traffic between the Select Server and the SQL Server.
- SoftPro Select versions 4.3.47 and 4.6.15 include an upgrade to Crystal Reports Runtime version 13.0.28. They also include Microsoft OLE DB provider for SQL Server. The combination of these products allows for all Select TLS 1.2 traffic to be encrypted.
- Please contact SoftPro Support for a new TLS 1.2 version if you run any of the following tools:
  - CrossTiersOrder
  - Custom Screen Builder
  - Screen Extraction Tool
  - Order Tool
  - Ledger Tool
  - Order Extraction Tool
  - Order Restorer Tool

IMPORTANT: TLS 1.0 and TLS 1.1 can be disabled on the SQL Server and Select Server with this update if there is no other (non-Select) traffic requiring it.