SoftPro Select 4.6.0
(ivy20190508r2)

Release Notes | revised November 11, 2019

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Summary

SoftPro Select new features and enhancements are highlighted below.

4.6.0 (5/13/2019)

- **Start Page**
  - The Select start page has been reconfigured and the default start page has a new look and feel.
  - You can choose to have a custom start page to the application.
  - An option is available to continue to use the legacy custom start page engine.
- **Title**
  - You can now link Policy and Commitment exceptions.
  - Endorsements can be overlaid from another order.
  - The sort order of Endorsements can be moved up or down, or sorted alphabetically by the description.
- **Worklist Grouping – Beta Feature**
  - This feature provides the ability to group worklist results.
  - Users now have the ability to provide feedback on this feature.
- **Plug-ins**
  - Added support to specify configuration information in plug-in SDK.
  - Added an API to associate users and groups with plug-ins.
  - Added the ability to view/add/edit configuration details of plug-ins.
  - Added the ability to enter license keys on a plug-in in SPAdmin.
  - SoftPro can now certify third-party plug-ins and notify Admins when a plug-in has not been signed by SoftPro.

ProForm

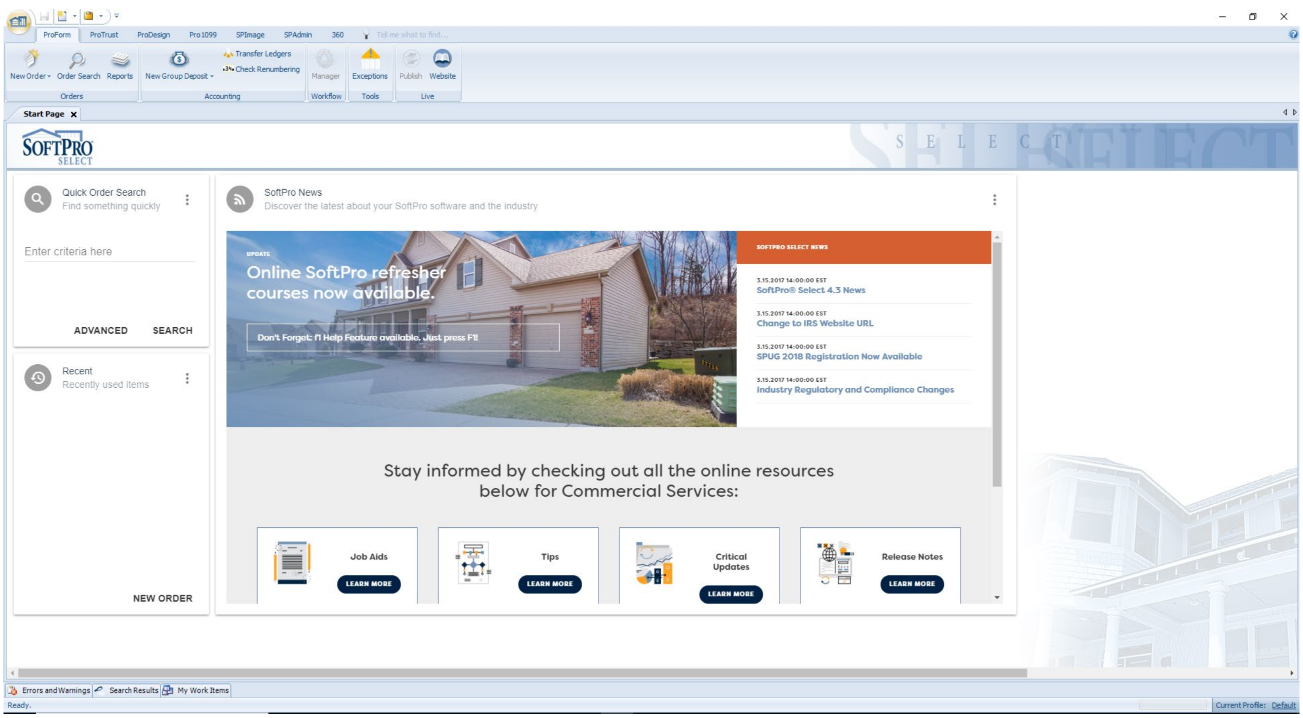
Select Start Page

- The Select start page has been reconfigured and the default start page has a new look and feel.
- A Custom Start Page Manager will allow Admin users to enter a URL for custom start pages and the ability to use a legacy custom start page engine.

New Start Page

The Select start page has been redesigned.

- The quick order search is still available to view recent orders.
- Create a new order by clicking the **New Order** button on the lower left panel.
- The new start page is supported by a chromium browser.



Custom Start Page Manager

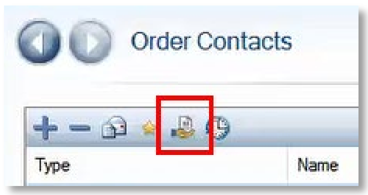
If you have a *custom* start page, a new Custom Start Page Manager has been developed. This is an optional screen and only needs to be enabled when a different start page should be used. For more information, see Custom Start Page Manager in the SPAdmin section.

Order

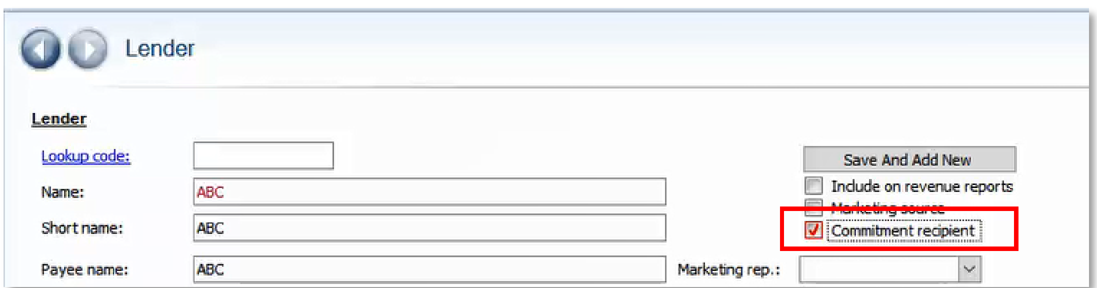
Order Contacts

Commitment Recipient

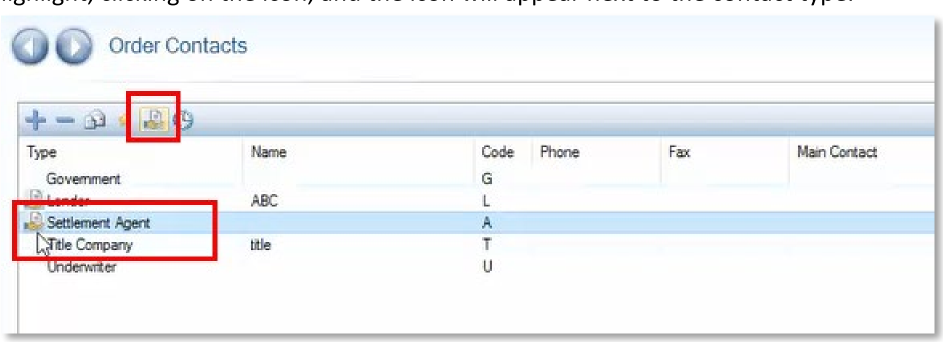
- This is a new feature to allow an order contact to be marked as a Commitment Recipient.
  - The **Commitment Recipient** icon is located on the Order Contacts toolbar.



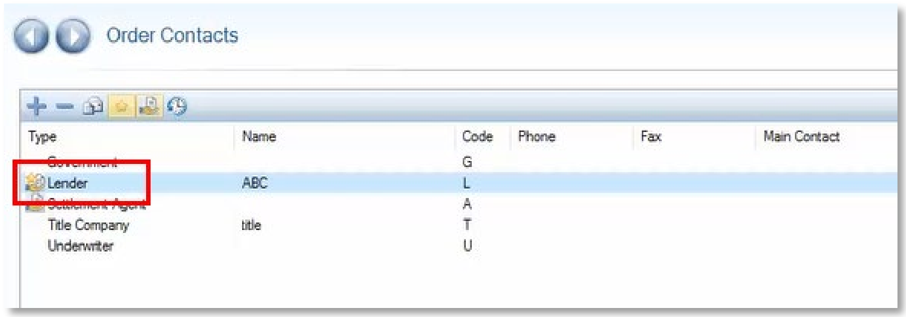
  - The **Commitment Recipient** checkbox is available on all Order Contact screens.



- You can check the box from the contact page.
  - You can add it to the lookup table for future reference.
- You can also mark the commitment recipient from the Order Contacts grid by selecting a contact to highlight, clicking on the icon, and the icon will appear next to the contact type.



  - If you click the Marketing Source icon (existing functionality), the icon changes to include both the Marketing Source and the commitment recipient.



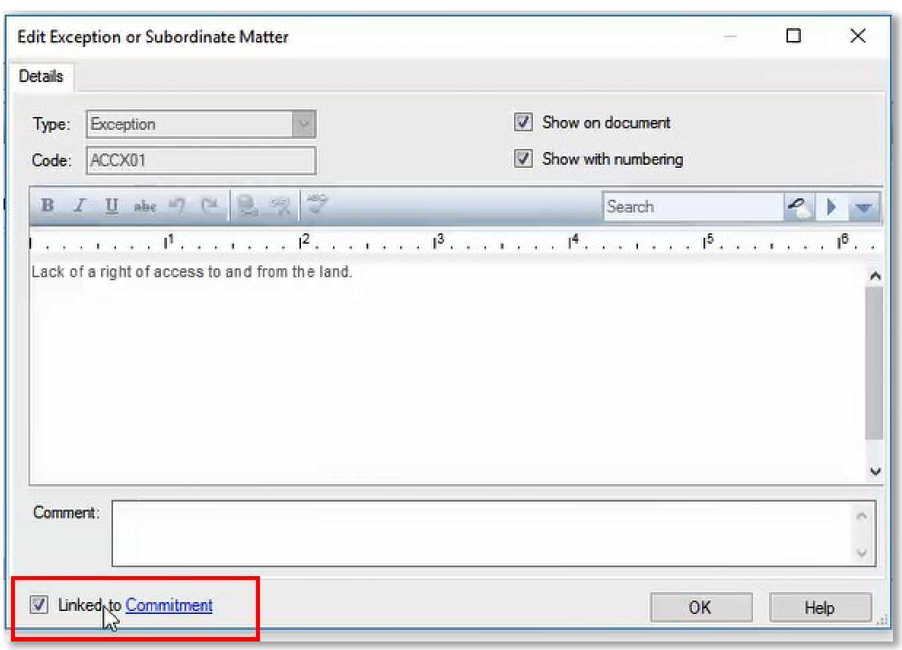
- When the lookup table for zip codes had filtering turned on, entering in zip codes and pressing Tab was not auto-populating the related fields; *resolved*. *11752*
- The License ID was not defaulting for contact people when that person was added to a contact automatically via the Escrow Officer/Closer dropdown selection; *resolved*. *506843*

Title

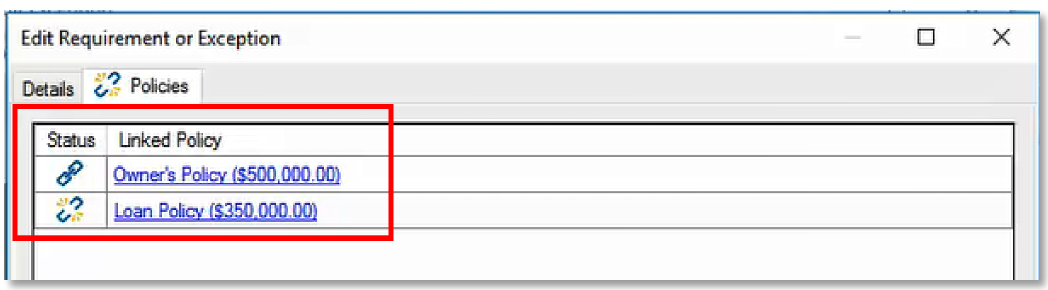
Linking Policy and Commitment Exceptions

This is a new option for policy exceptions to be linked to their related commitment exceptions and requirements.

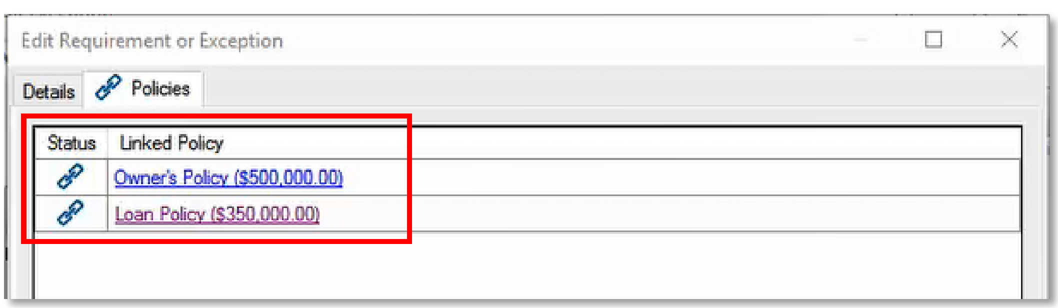
- On the Policy - Schedules B1, B2 screen, click the **Start Policy** button, then click on an Exception.
  - The Edit Exception or Subordinate Matter pop-up has a new checkbox: **Linked to Commitment**.



- The checkbox default can be set to checked (On), or unchecked, (Off). This preference is set in SPAdmin.
  - When defaulted to checked, anytime you select **Start Policy** to pull your commitment exceptions to the policy, or select to **Import** your exceptions onto your policy from the commitment, the exceptions would automatically be linked.
- Click on the **Linked to Commitment** link, and it opens the dialog for the commitment exception, where you can make any edits as needed.
  - Any edits made on the commitment exception will update automatically on the policy exception.
- If you don't want them to be linked any longer, you can uncheck the box. This allows you to edit the commitment exception, but the update will *not* flow to the policy exception. It also allows you to edit the policy exceptions to be different from the commitment exception.
  - If you decide you want to link them again, check the box again, and any edits will be updated.
- On the commitment side, to be able to see whether a policy is linked by clicking on the exception, and viewing the linked or broken link icon on the Policies tab on the dialog .
  - If you have more than one policy that has that same exception and one of them is linked and one is not, the tab icon will show as a broken link to indicate that at least one policy has a broken link.



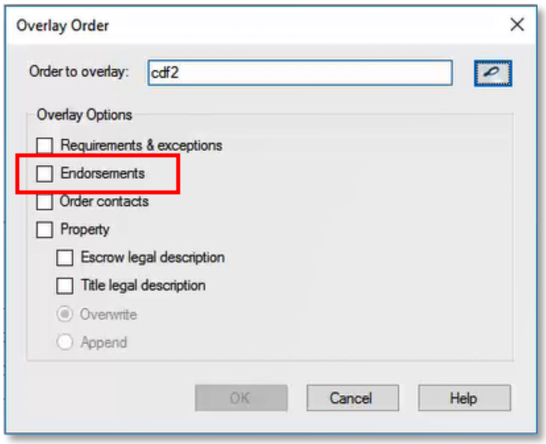
  - If all of them are linked, the tab icon will show as linked.



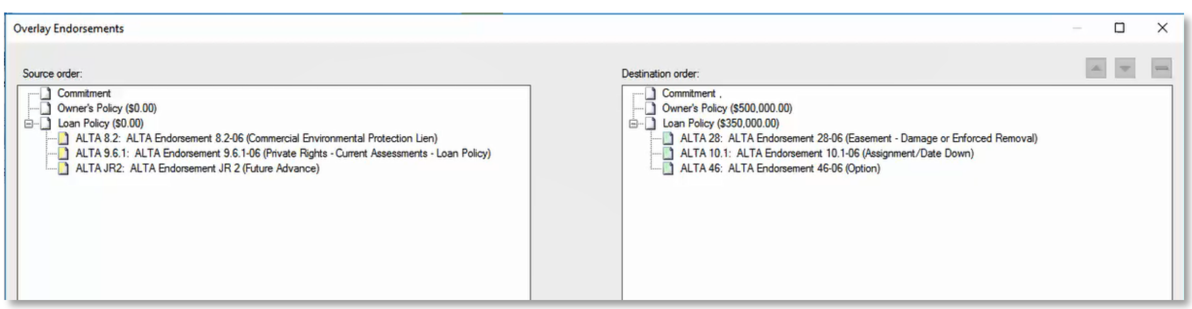
Overlay Endorsements

This new option allows you to take an order than has endorsements in it and overlay the endorsements into another order.

- The new overlay **Endorsements** option is available in the Overlay Order pop-up.



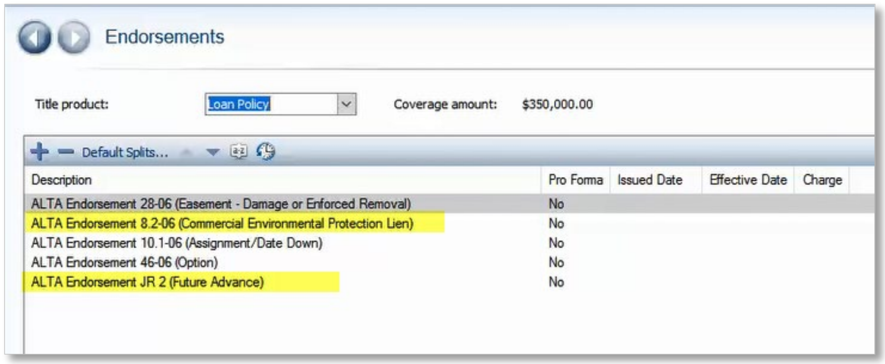
- Check the **Endorsements** box, and a new screen opens to select which endorsements to overlay into the order.
    - Source order – contains the Endorsements in the order to be overlaid into the current order.
    - Destination order – the current order that will contain the endorsements already in the order and any new endorsements selected for overlay.



- You can copy the entire folder or select individual endorsements, and either **drag and drop** from the Source order to the Destination order, or click the **Add** button.

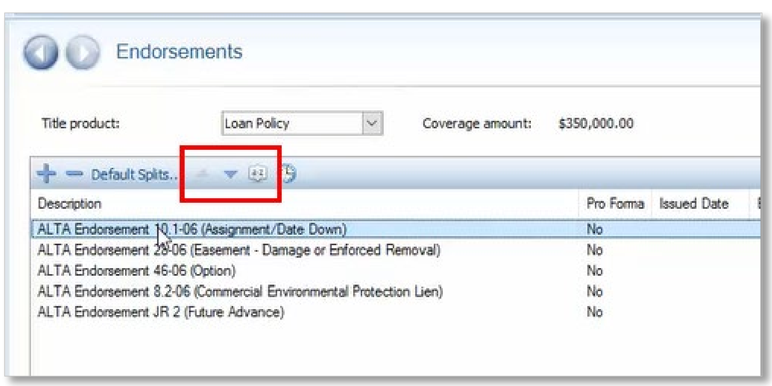
- To modify the endorsements you've added to the Destination order, you can:
    - Remove any endorsements using the minus button.
    - Move an item up or down using the up and down arrows.

- The new endorsements that were just added appear in the Endorsements grid.



Sort Endorsements

- The Endorsements toolbar has new buttons that allow you to sort the list for the selected title product:
  - Move an item up with the up arrow
  - Move an item down with the down arrow
  - Sort alphabetically – this will sort by the endorsement description. Numerical items will be sorted by character, e.g., 1, 10, 2, 28.

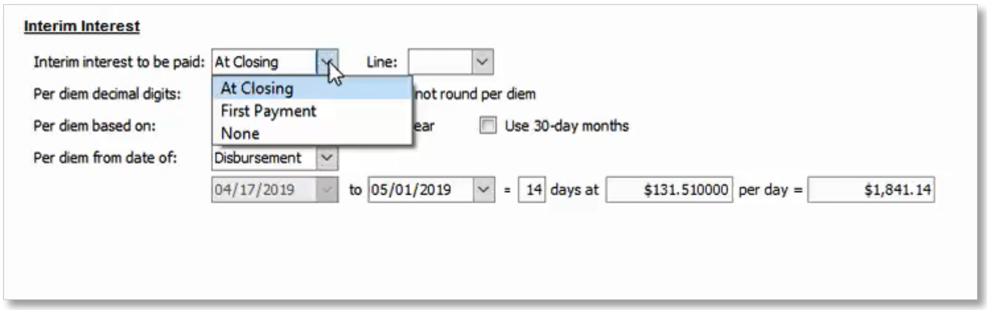


- The Loan Policy Premium was calculating incorrectly when the Owner's policy coverage is greater than Loan Policy coverage, instead of the "Premium to Split" amount showing as zero, it was calculating based on the rate table; *resolved*. 11315
- An error was thrown when attempting to overlay a subordinate matter into a loan or owner's policy exception; *resolved*. 519720

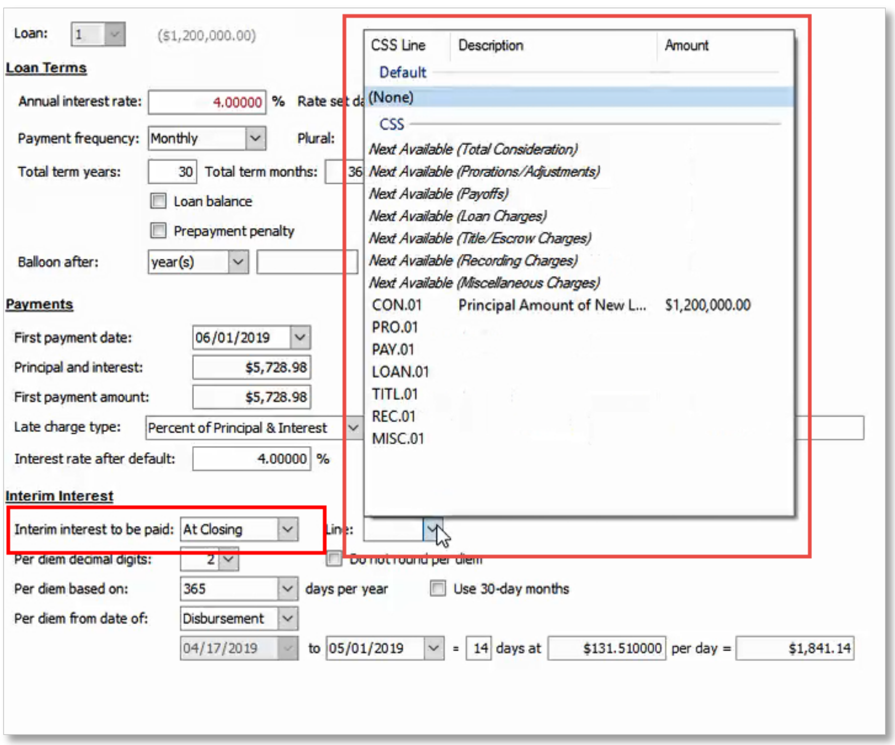
Commercial

CSS Interim Interest

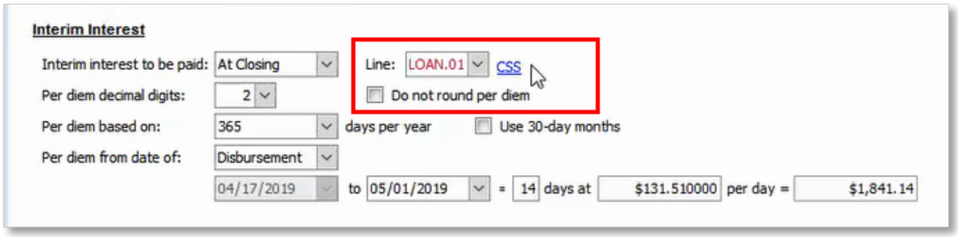
- The Interim Interest to be paid now has a drop-down so that now you can select when the interim interest is to be paid, in this example, At Closing.



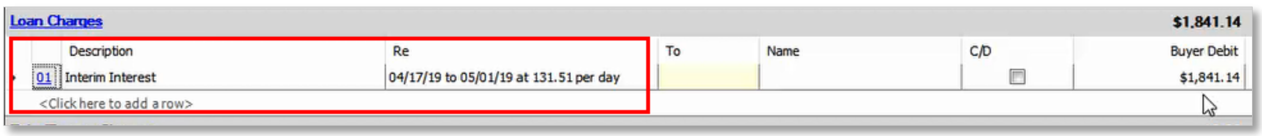
- You can also select the CSS line to send the Interim Interest to:



- When you select a line from the drop-down, a CSS link will appear next to the line.



- Clicking the CSS hyperlink takes you to that line, and the Interim Interest will show the dates, the per day amount, and the total amount for the Buyer debit.



Documents & Attachments

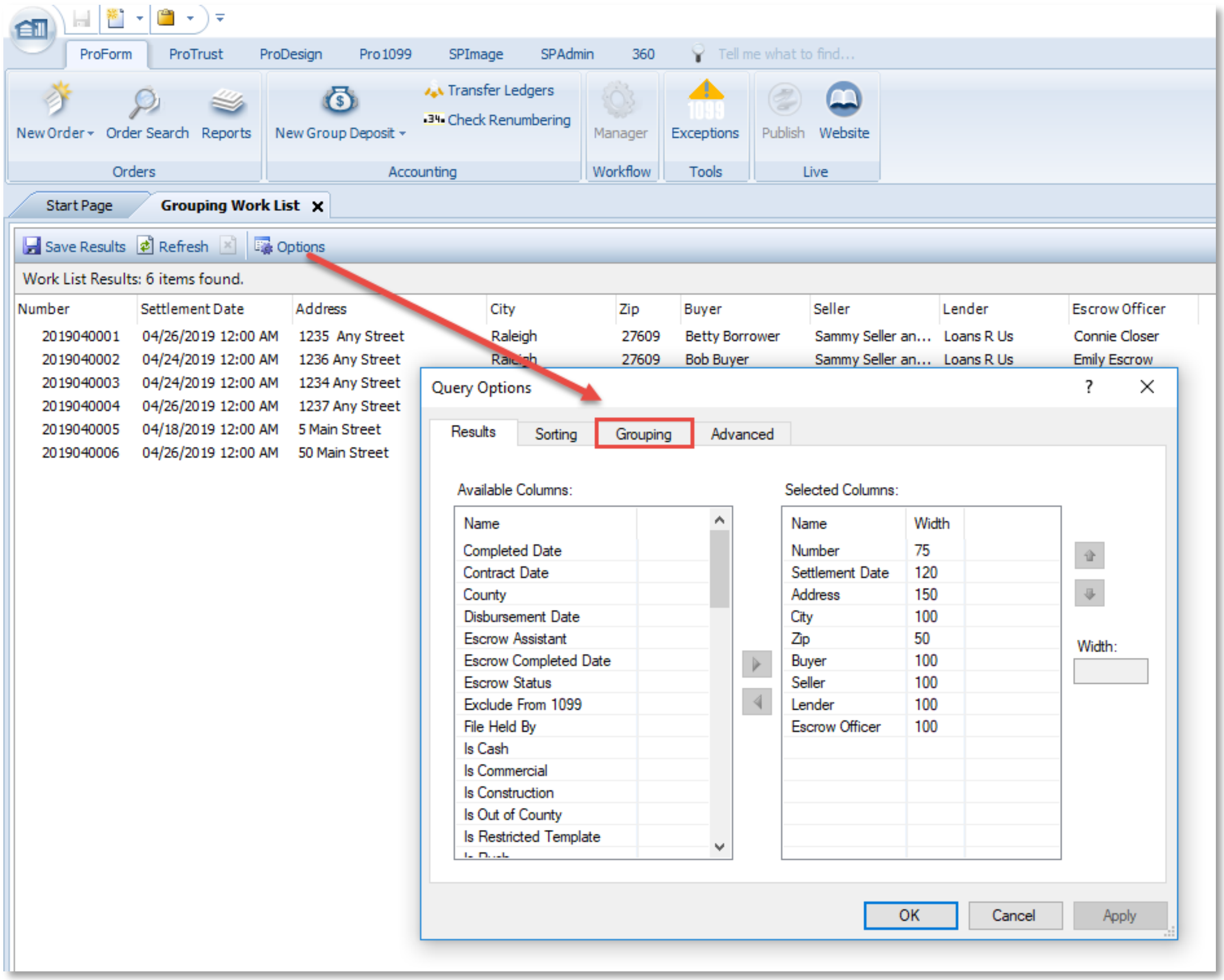
- The Drag and Drop function from the Select Attachments to the desktop was not working properly, requiring multiple attempts, and sometime incurring an error; *resolved*. *11046*
- Moving an attachment from one folder to another could result in duplicate copies and an error message when trying to open or delete the attachment; *resolved*. *11952*
- Some versions of Select experienced slowness when editing the filename of an attachment in an order; *resolved*. *11977*

Worklist Grouping – Beta Feature

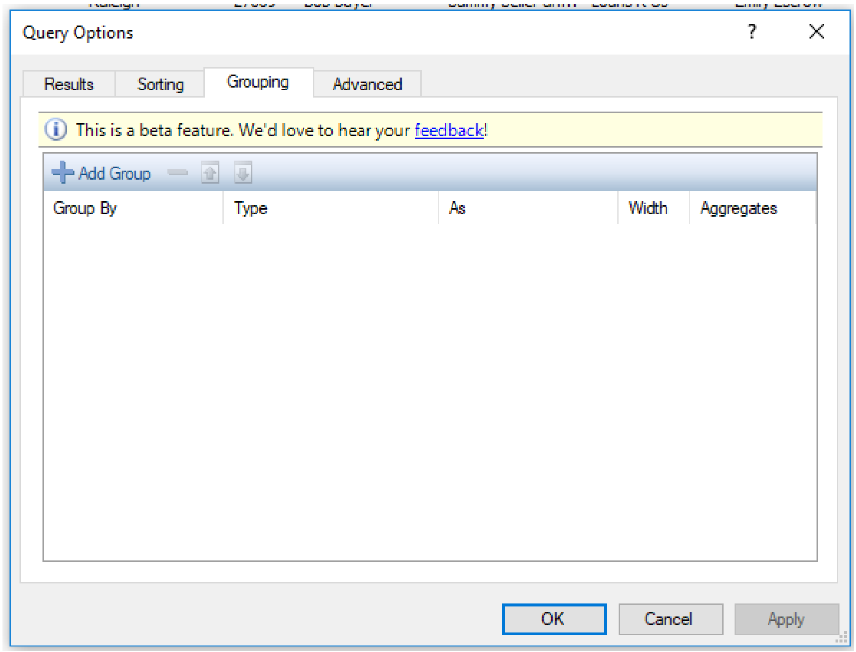
- Provides the ability to group worklist results
- Users now have the ability to provide feedback on this feature

The results from a Work List query currently display in a single list view. A new feature which is currently in beta allows users to 'group' the results. Here is how it works.

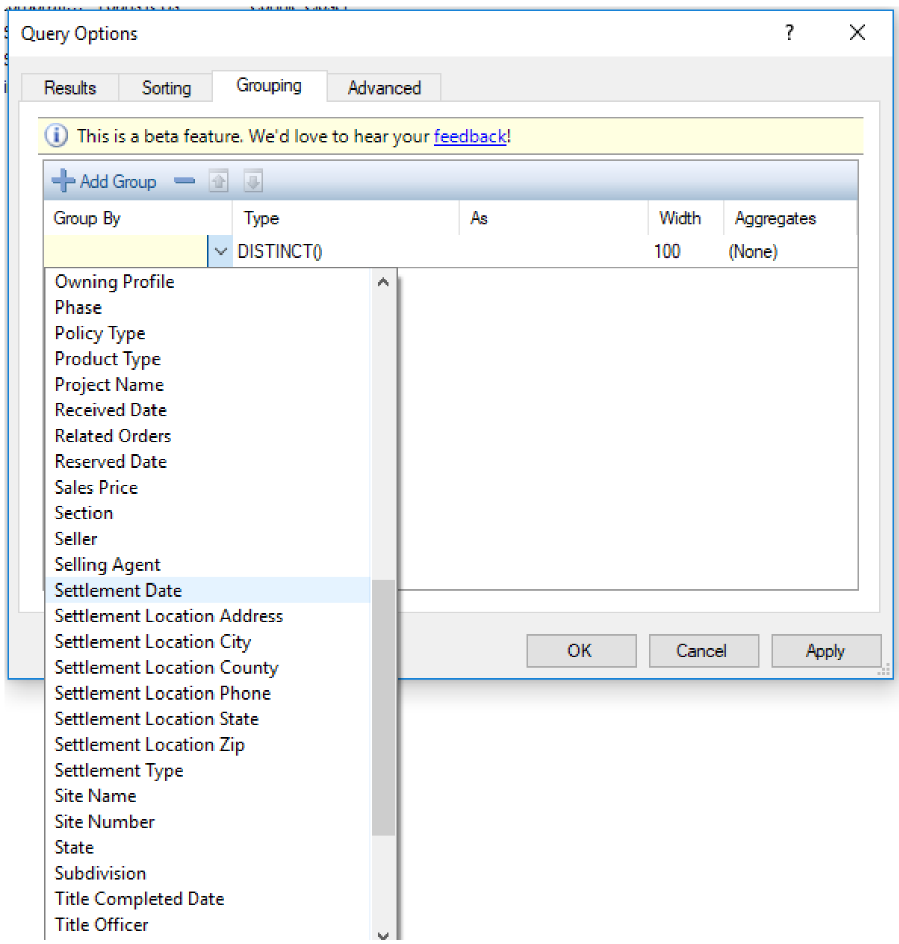
- After running a Work List query, click **Options** to see a new Grouping tab on the dialog.



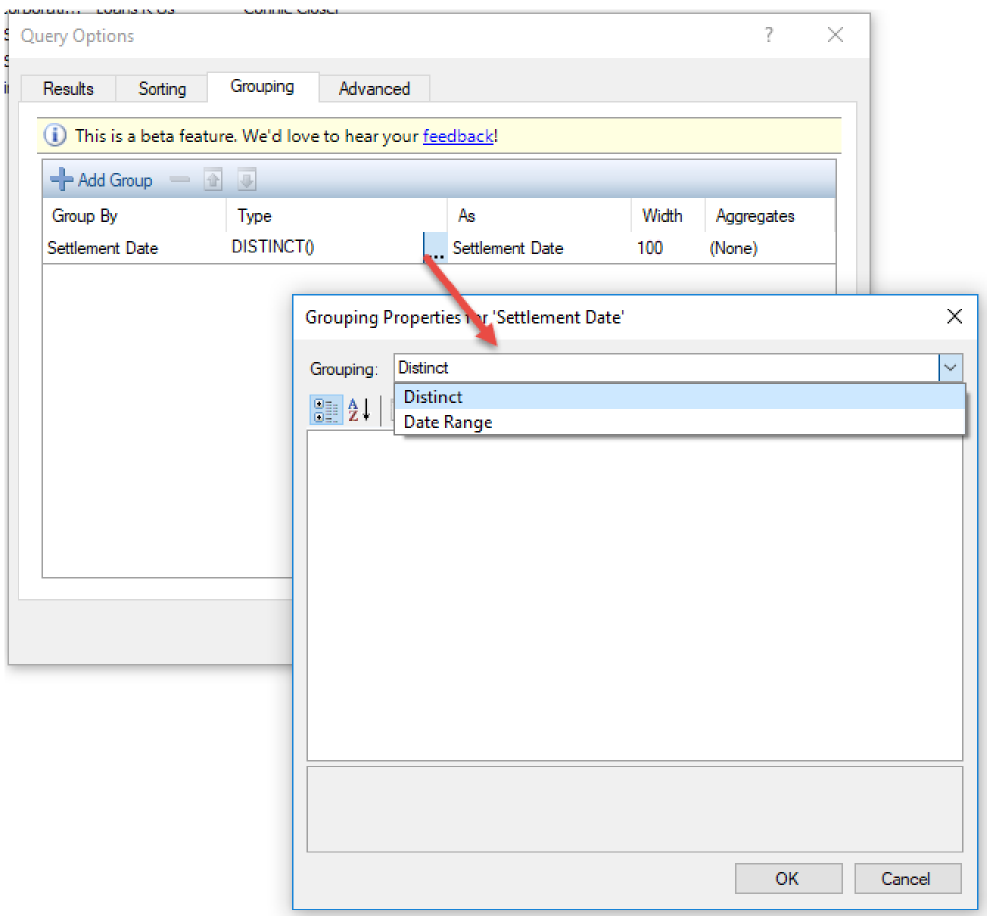
- Click the **Grouping** tab to enter new groupings.



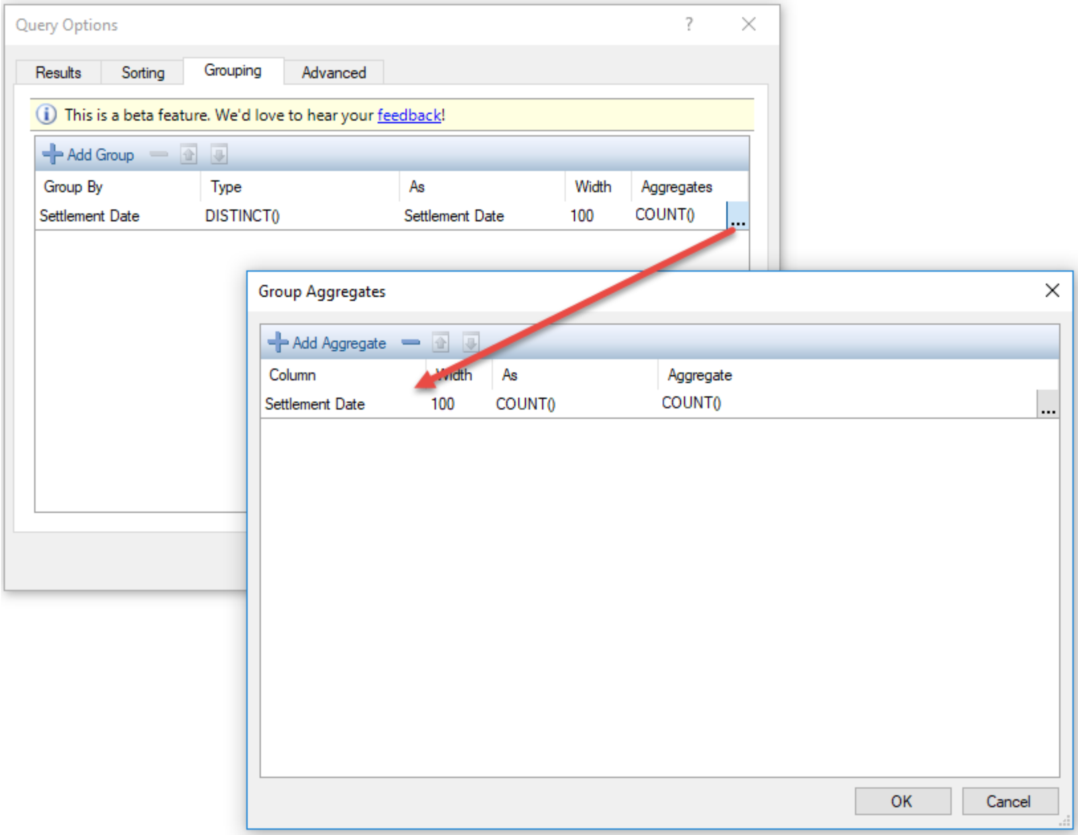
- To add a new grouping, click the **+Add Group** button.
- Select a method to group by from the Group By dropdown list. For example, to group results by Settlement Date, click **Settlement Date**.



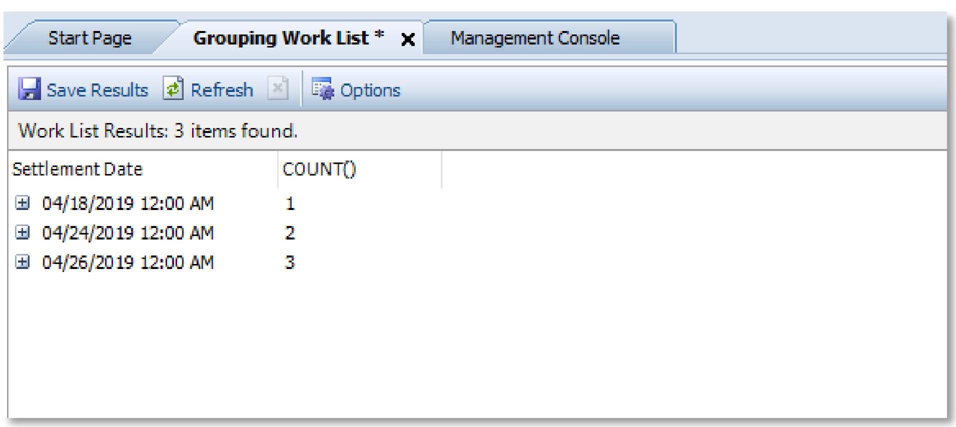
- For a date grouping, you can group by distinct dates or by a date range. In this example, the results will group each date separately.



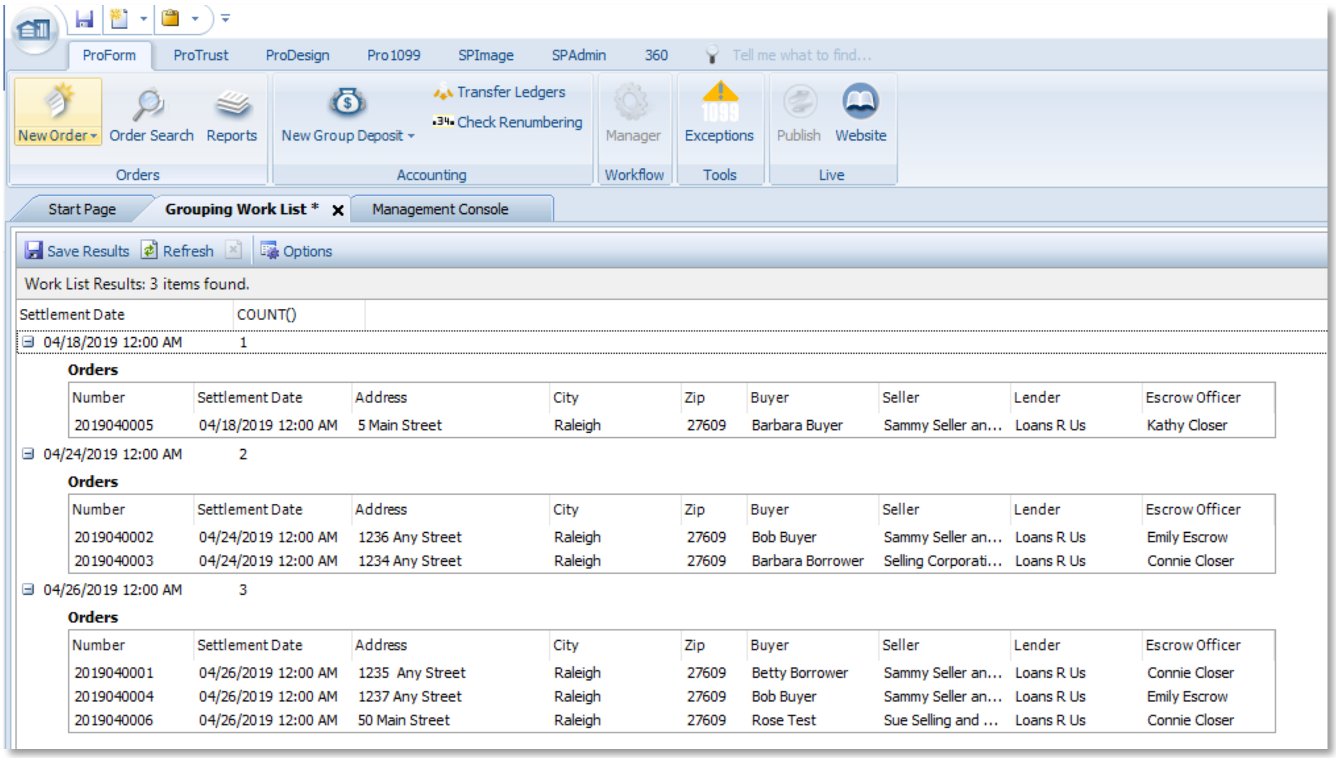
- You can also specify how to display the totals. In this example, the count will display the number of files closing for each Settlement Date.



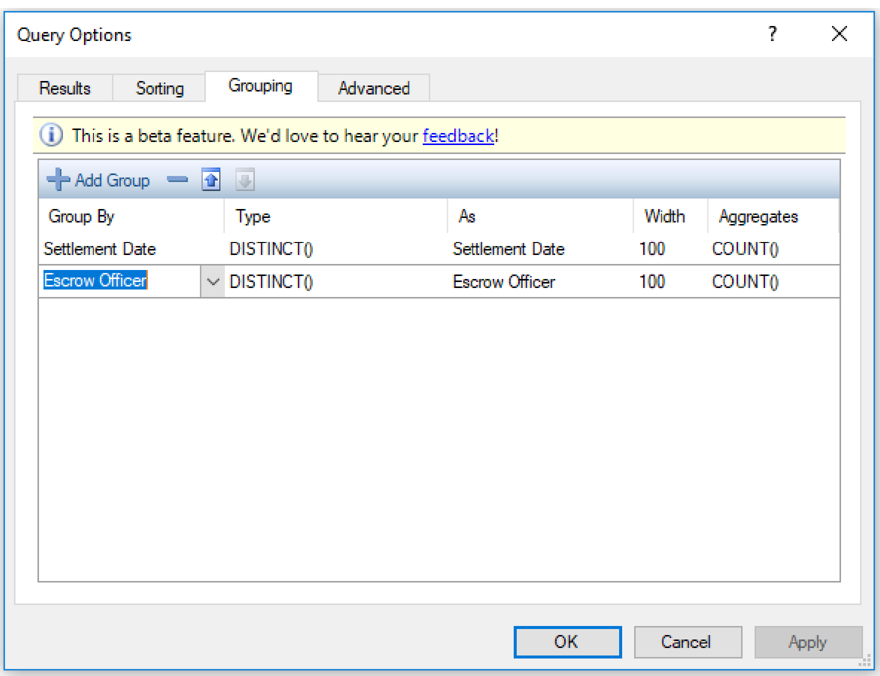
- Click **Refresh** to see the results:



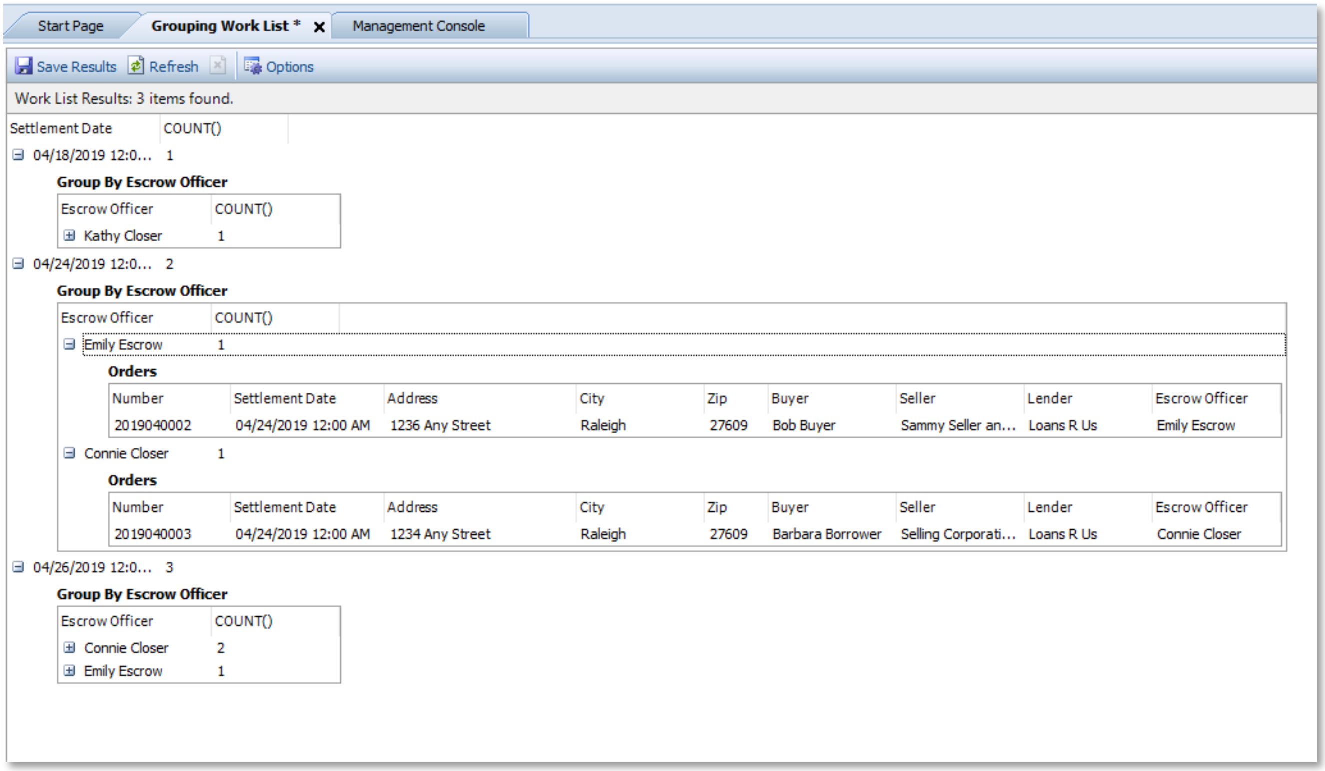
- Expand each group to see the details for each day.



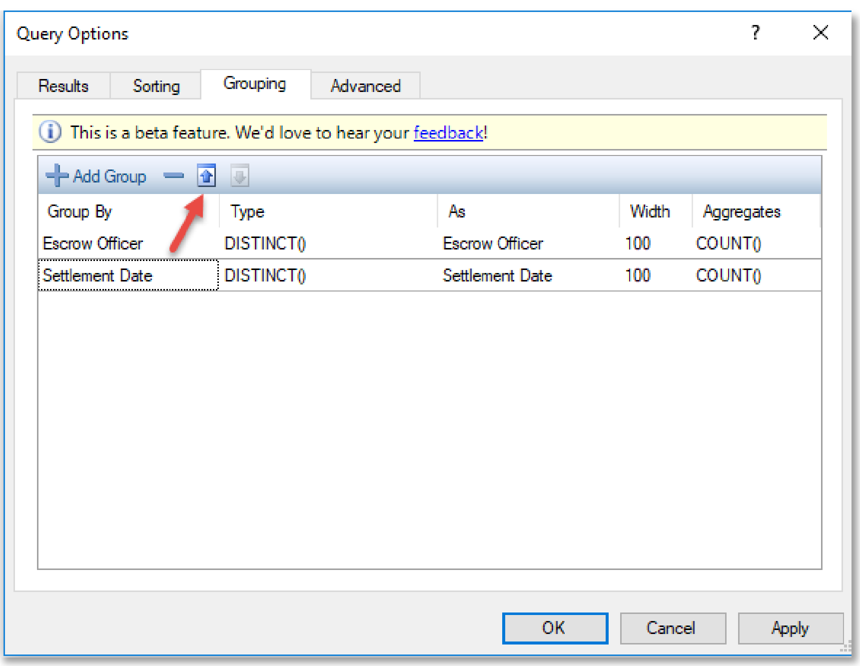
- To group this list further by Escrow Officer, add another group for Escrow Officer.

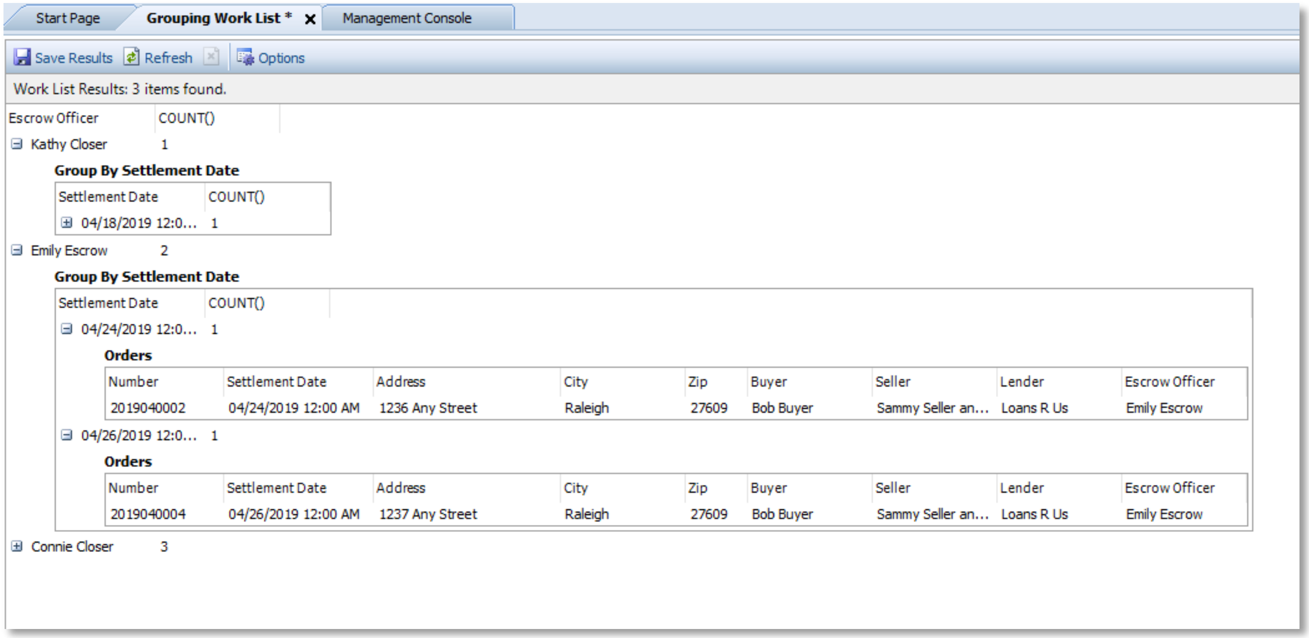


- Click **Refresh** to see the results grouped by Settlement Date and then by Escrow Officer.



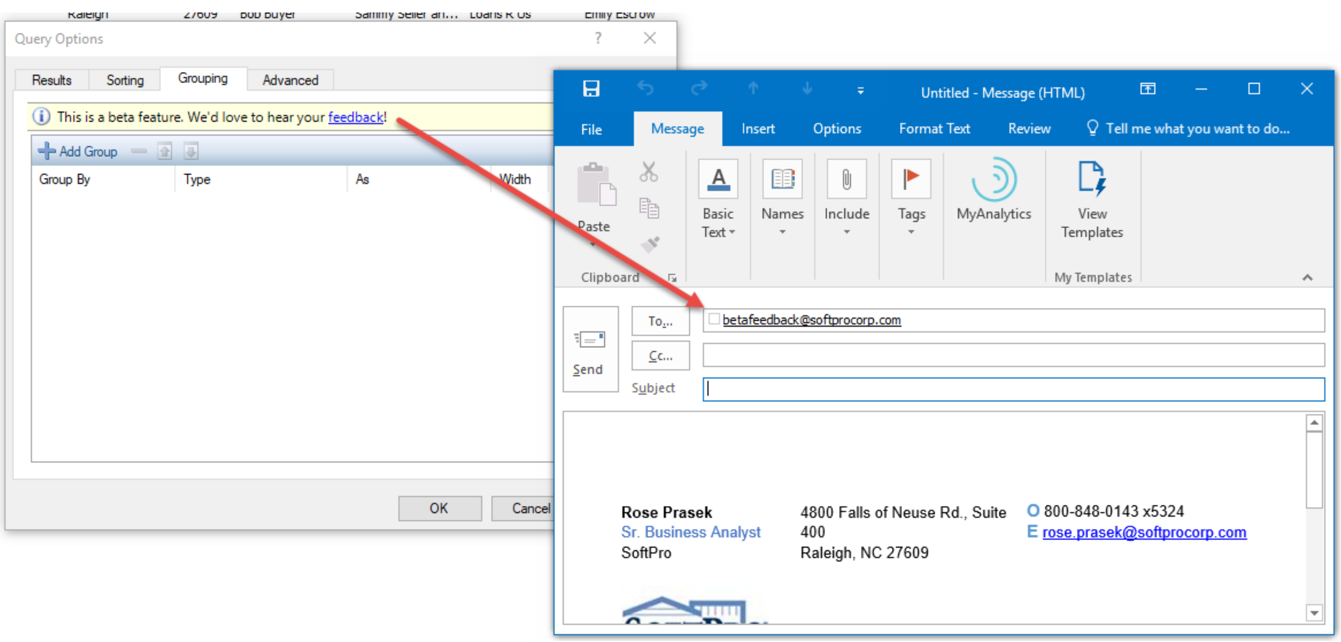
- You can change the order of the grouping by using the arrow to move the Escrow Officer above the Settlement Date. Refresh the results to see the grouping first by Escrow Officer, followed by the number of closings for each Settlement Date.





Provide Feedback to SoftPro

You can provide feedback to SoftPro by clicking on the feedback link on the Grouping tab.



- When a user has been deleted and recreated, the orders and tasks assigned do not appear in My Orders and My Tasks for that user; *resolved*. 11753
- The Workflow Tasks License is being used when a user is logged into the application, and a subsequent user is also logged into Workflow tasks; *resolved*. 11795
- An unexpected error occurred in Work Lists when running "New Work List" and entering the value @CurrentMonthEnd or @PrevMonthStart; *resolved*. 11800

ProTrust

- When trying to post a transaction in the register, Select was unable to resolve conflicts with other users, and the merging conflicts error did not specify what failed to merge; *resolved*. 11808
- Processing time was less than optimal for some users performing reconciliation or preparing construction draws; *resolved*. 12365

Pro1099

- Pro1099 Records were still showing the TAX ID number of a spouse after being removed from ProForm; *resolved*. 11799

SPAdmin

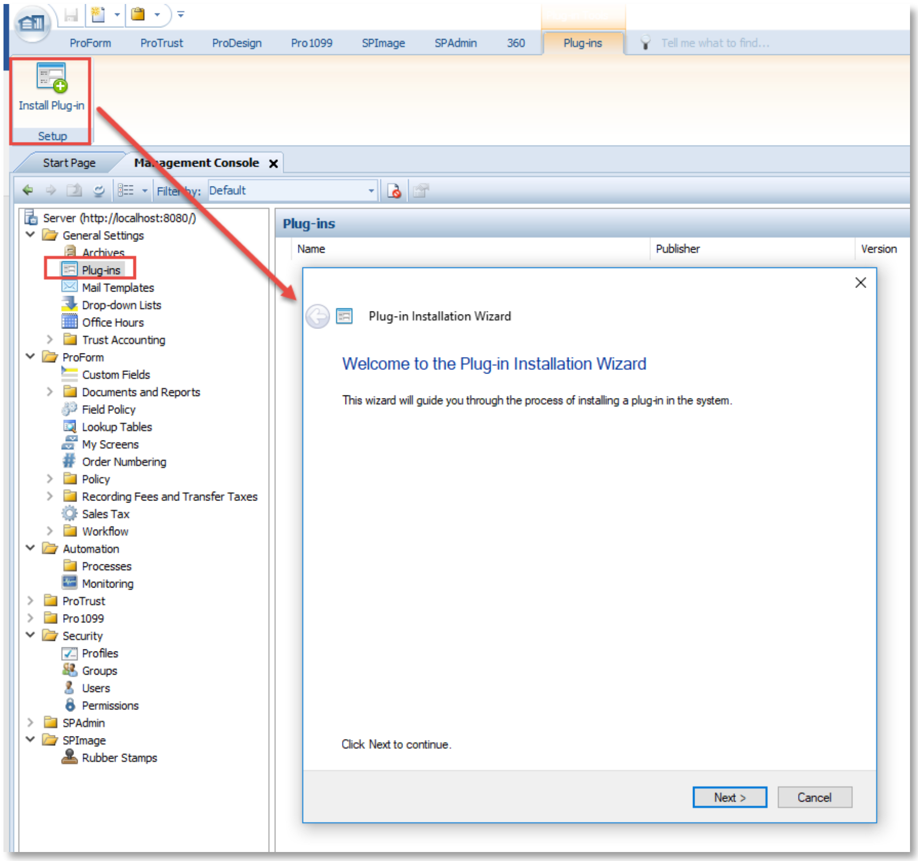
Plug-ins

The 4.4 release unified the packaging and deployment of custom integrations through the concept of a plug-in. Version 4.6 includes the following enhancements to the plug-ins:

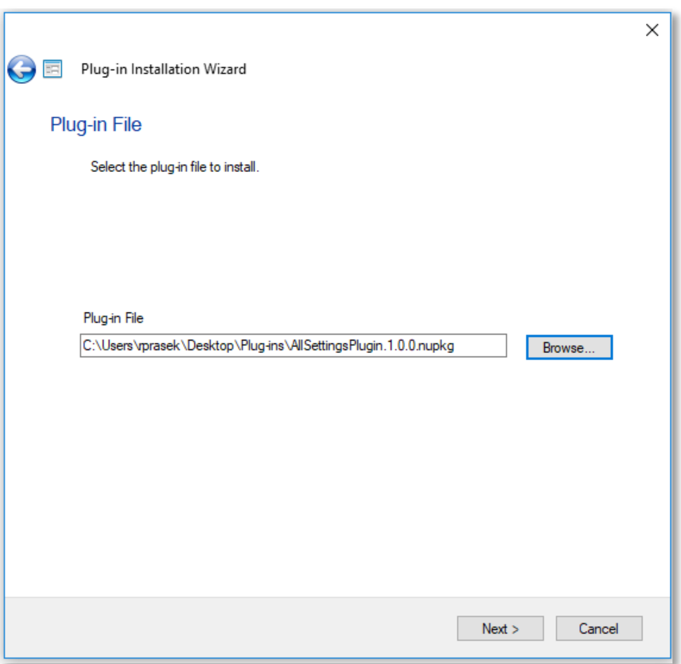
- Added support to specify configuration information in plug-in SDK
- Added an API to associate users and groups with plug-ins
- Plug-ins can be associated with users/groups after installation
- Added the ability to view/add/edit configuration details of plug-ins
- Added the ability to enter license keys on a plug-in in SPAdmin
- SoftPro can now certify third-party plug-ins and notify Admins when a plug-in has not been signed by SoftPro

The Plug-in Installation Wizard can be accessed here:

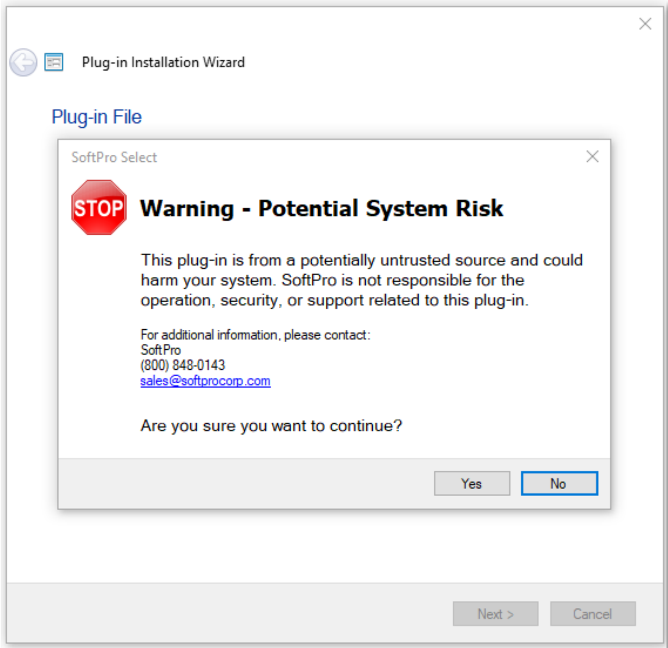
SPAdmin > General Settings > Plug-ins > Install Plug-in



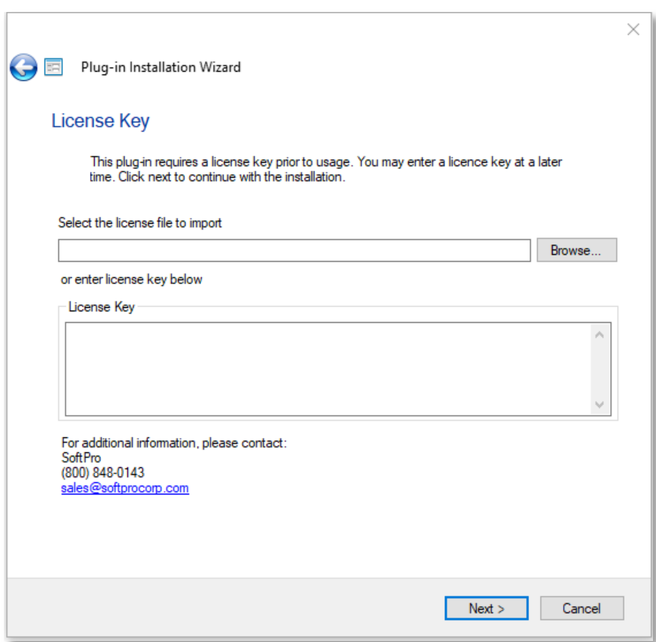
- Click **Browse** to select the plug-in file to install.



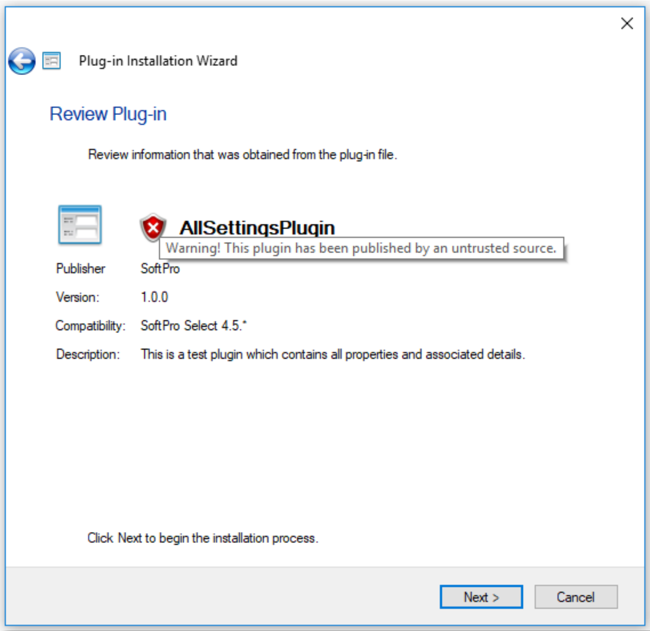
- If the plug-in has not been signed by SoftPro, a Warning will display to the Admin user. To stop the plug-in from installing, click **No**. Click **Yes** to continue installing the plug-in.



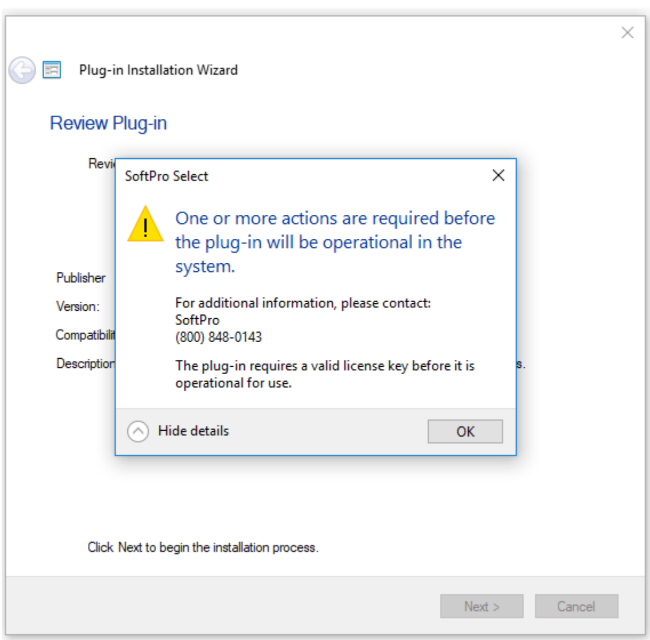
- If the plug-in requires a license key, a License Key screen will display. The license key can be entered either by browsing to the license file or copying and pasting the license key. Plug-ins can still be installed without a license key but will not be enabled until a license key has been entered.



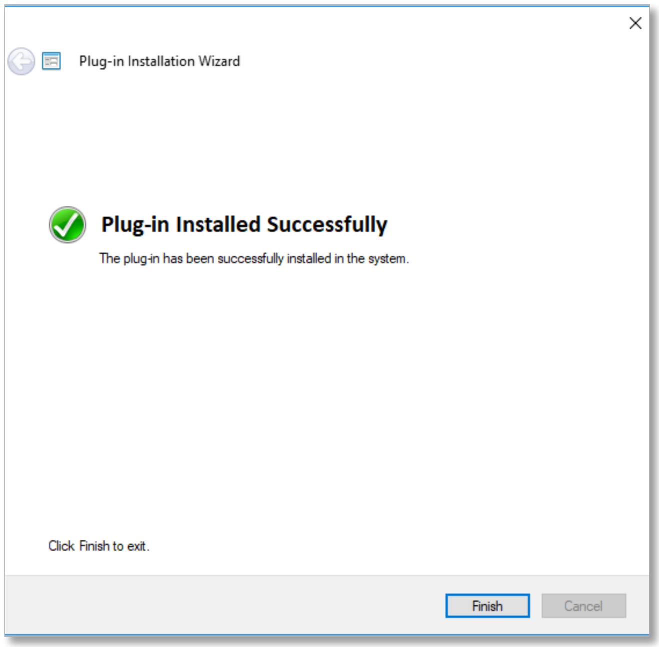
- Prior to installation, a Review of the Plug-in will display. For plug-ins that have not been signed by SoftPro, a warning will display.



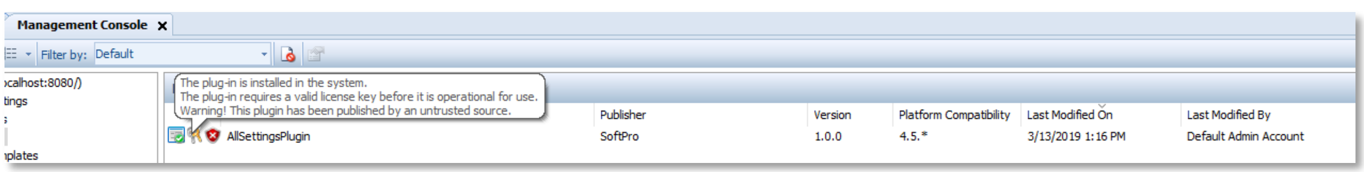
- Click **Next** to begin the installation process.



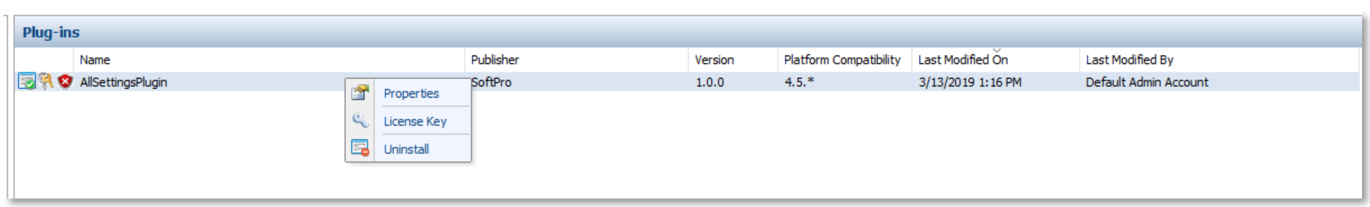
- When the plug-in has been installed successfully, the following screen will display.



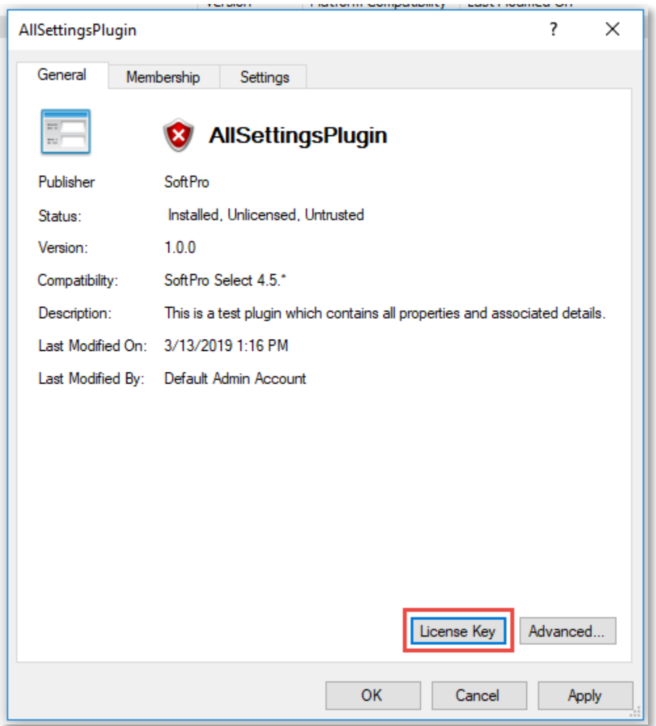
- The management console displays the plug-in information and status icons. Hovering over the icon will display a tooltip showing the status.



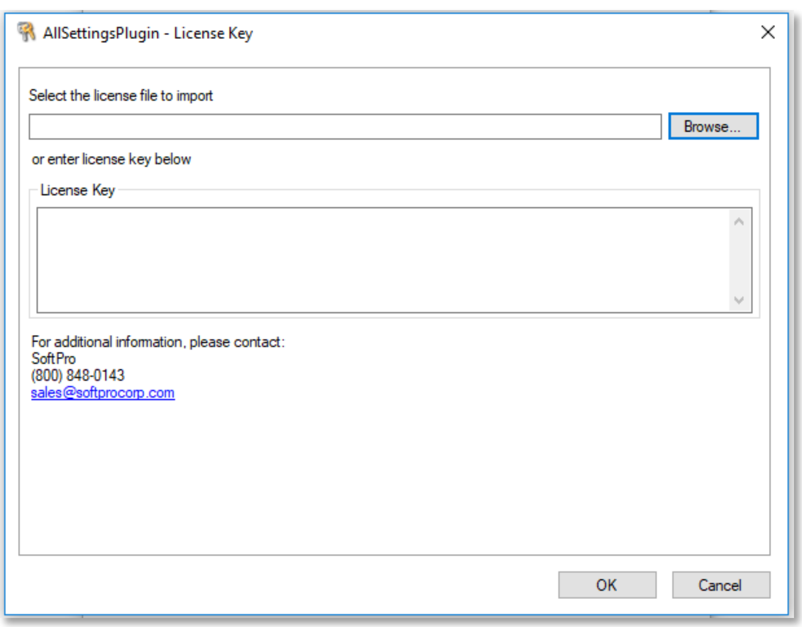
- Access the Properties page by double-clicking the plug-in, or right-click to access the plug-in, enter a license key, or uninstall the plug-in.



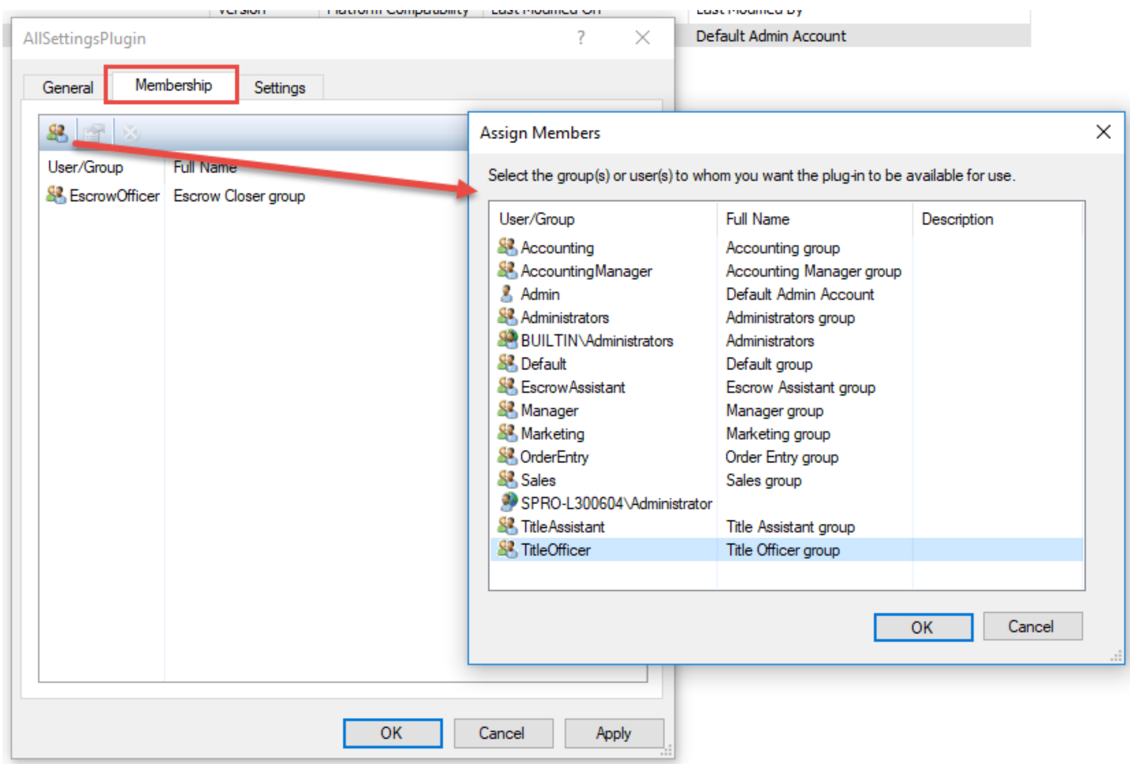
- You can associate members, configure settings (if applicable), or enter a license key from the properties dialog. To enter a license key on an installed plug-in click the **License Key** button.



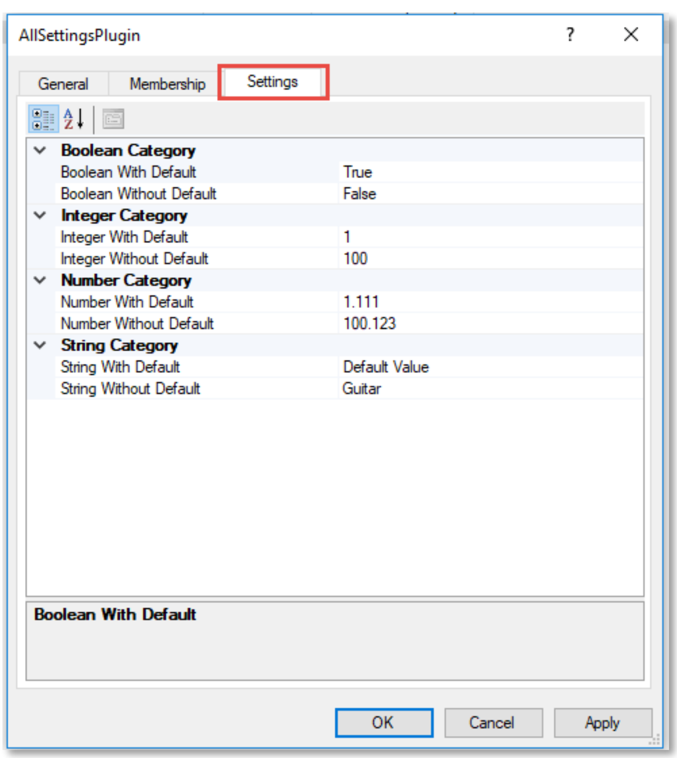
- Enter the license key by browsing to the license file or copying and pasting the license key.



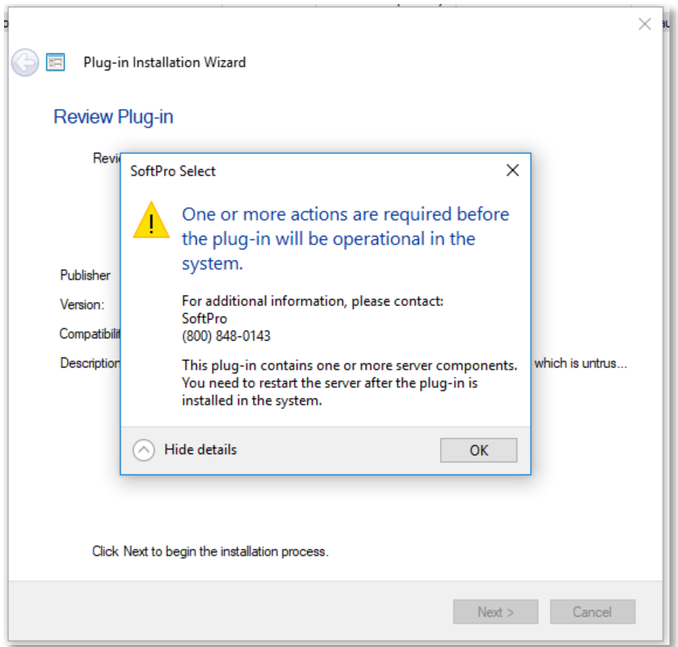
- To associate users/groups with a shell package plug-in, click on the **Membership** tab. If the plug-in license requirements are satisfied but no User/Group is added, the plug-in will not be available to any users. When User/Group is added or removed they will be added or removed when the client is launched.



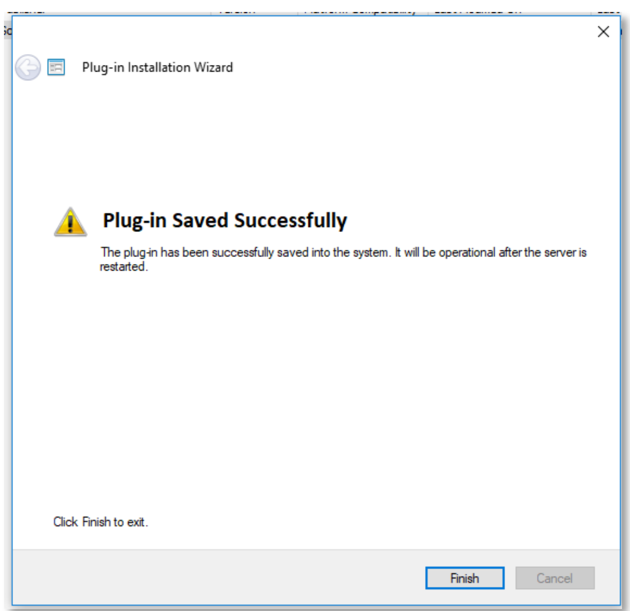
- If the plug-in has configuration settings, a **Settings** tab will display. Click on the tab to select the settings.



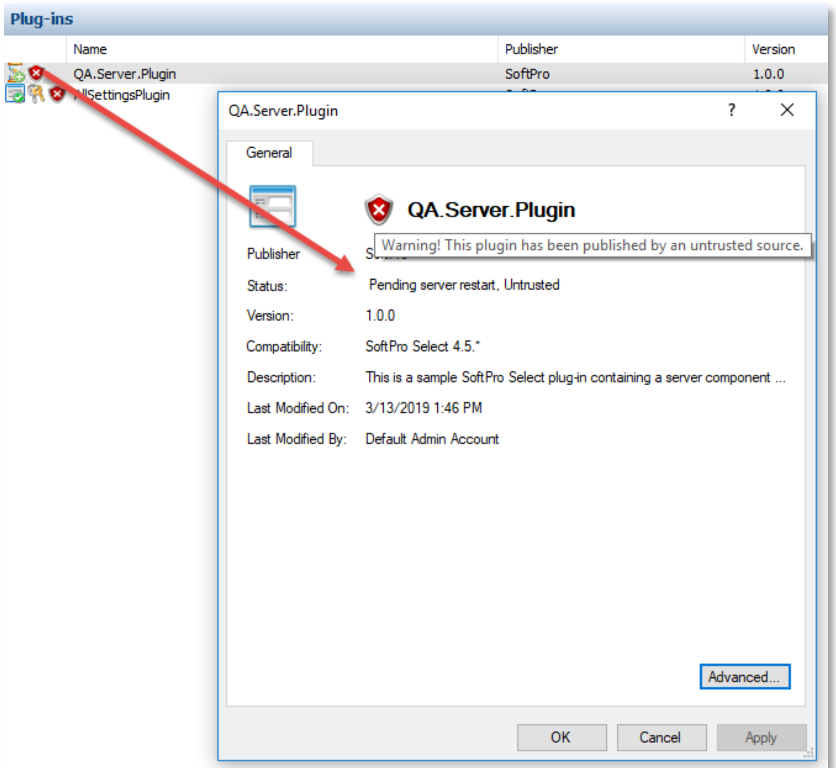
- When installing a plug-in that contains one or more server components, a warning message will display prior to installation.



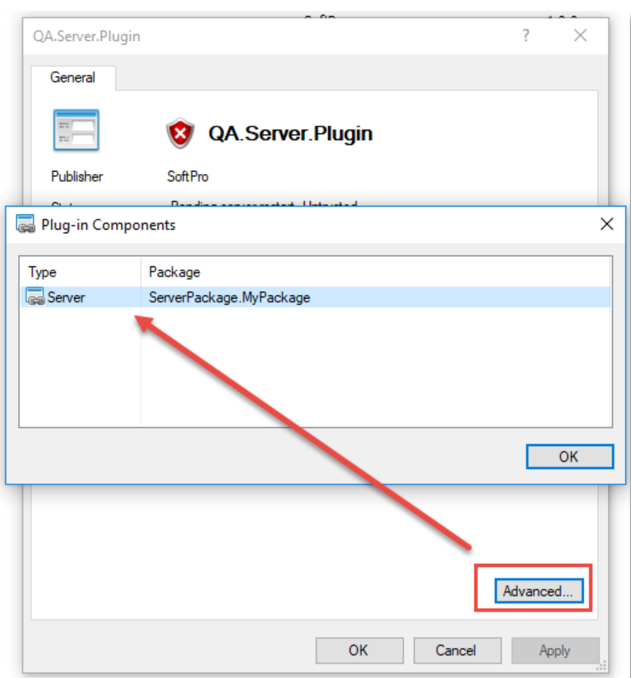
- After installation, the following dialog will open.



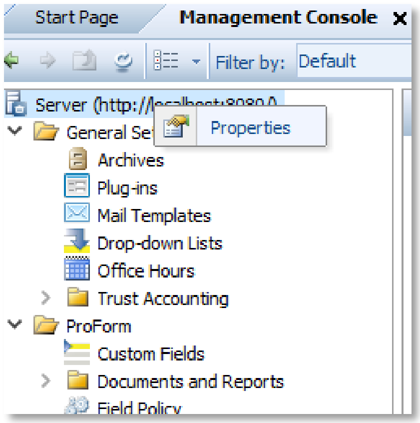
- The properties dialog for a plug-in that contains a server component will show a Status of ‘Pending server restart’ and if the plug-in was not signed by SoftPro it will also show ‘Untrusted’. A plug-in can contain shell and server components, and will need to be restarted whenever there is a server component.



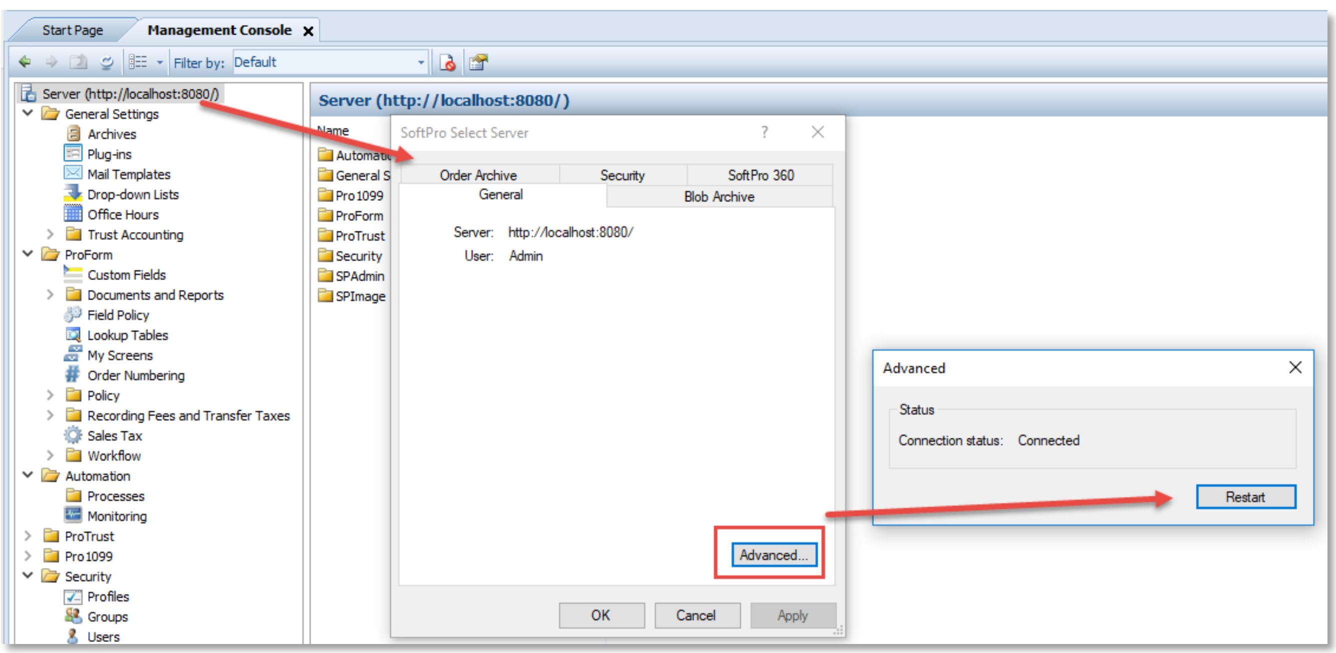
- Click the **Advanced** button to view details regarding the plug-in.



- To restart the server in SPAdmin, right-click on the Server and select **Properties**.



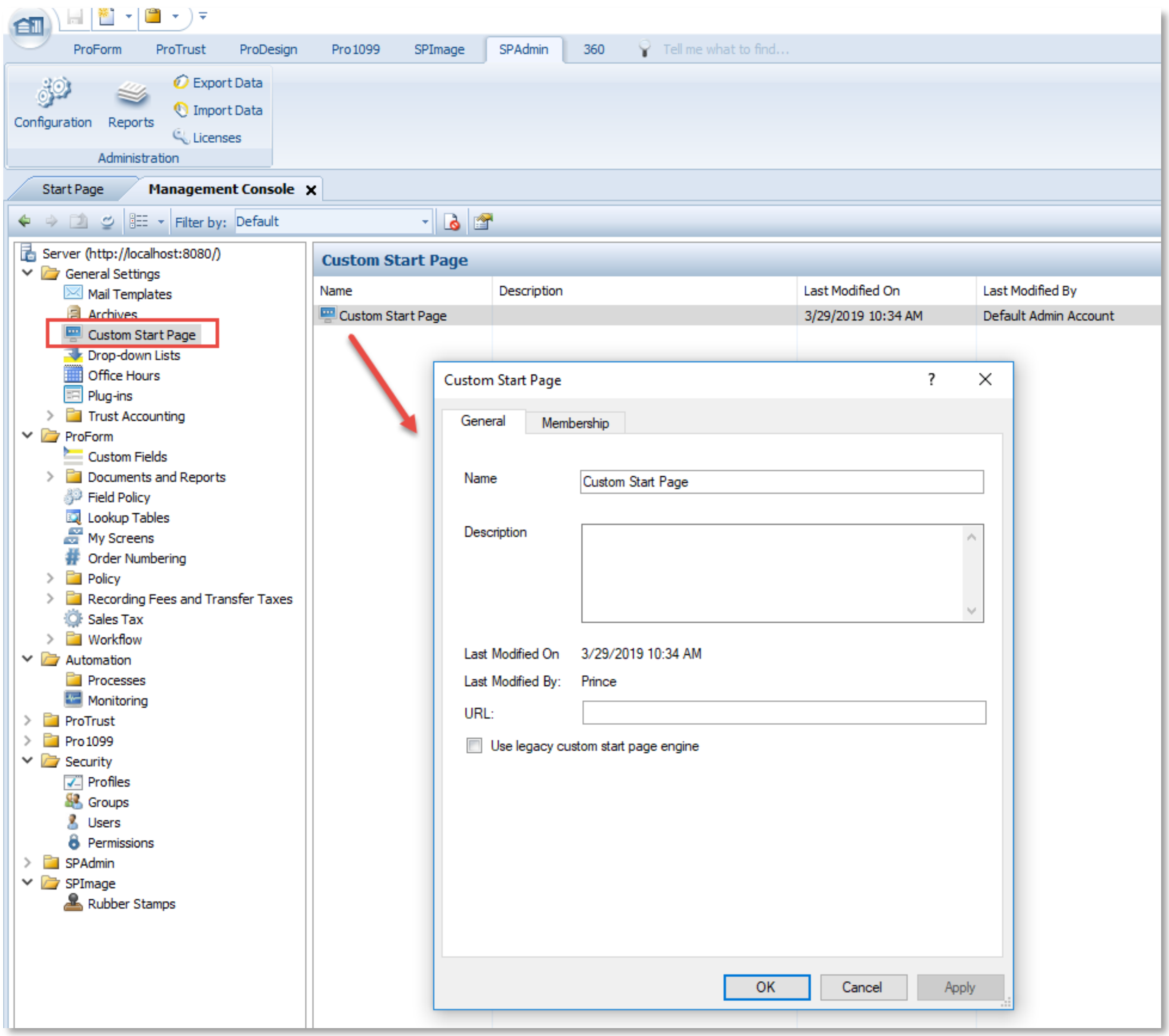
- On the General tab, click the **Advanced** button to restart the server. Once the server has been restarted, the plug-in will be available.



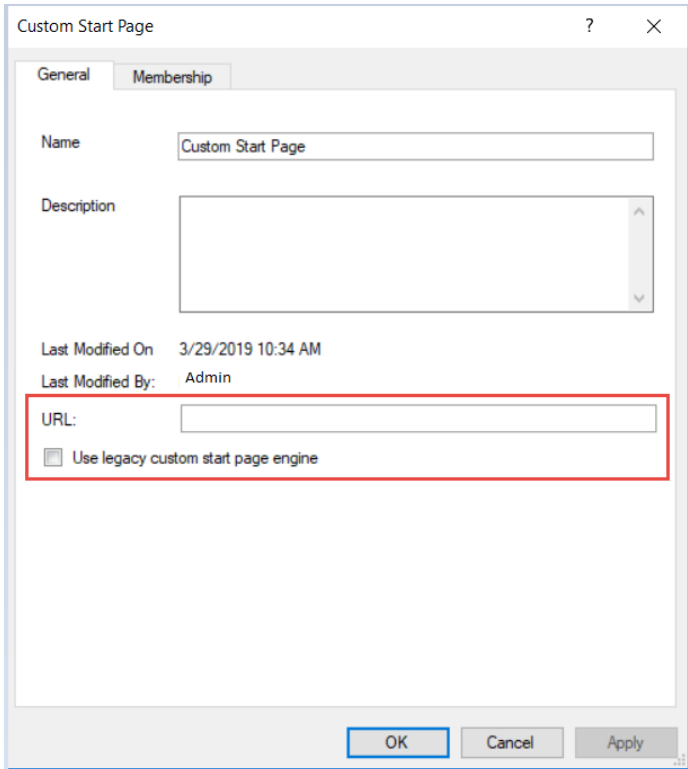
Custom Start Page Manager

For customers that have a *custom* start page, a new Custom Start Page Manager has been created. This is an optional screen and only needs to be used when a different Select start page is used.

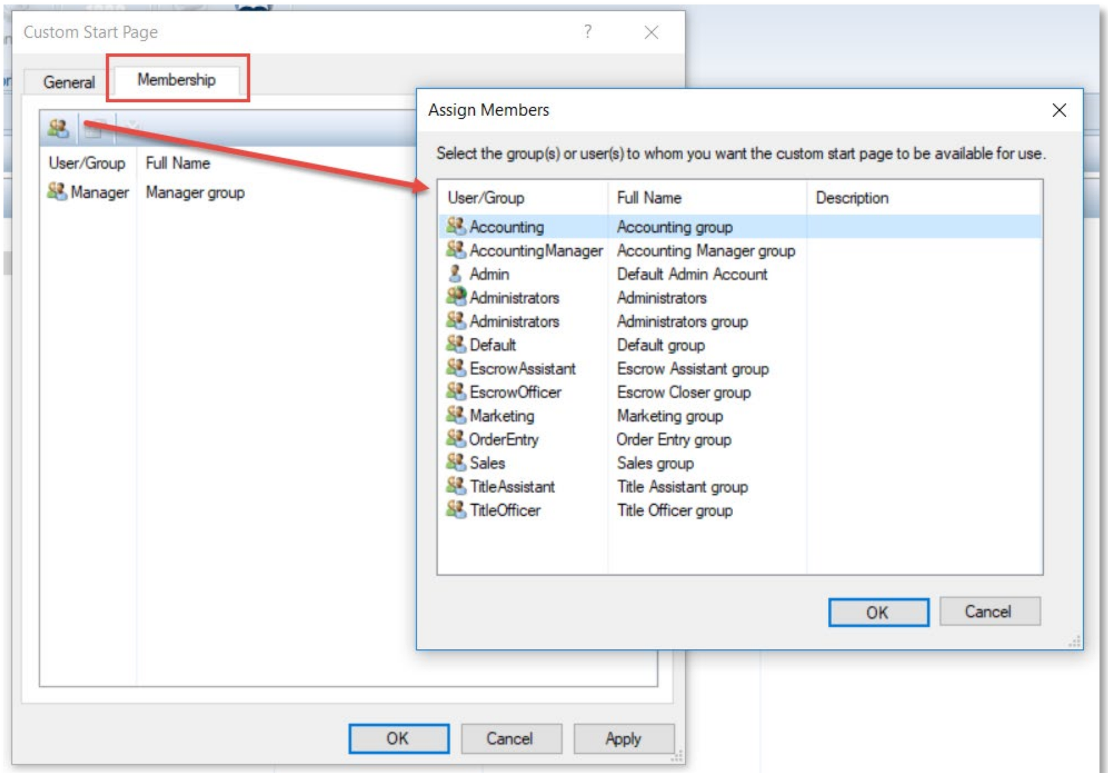
The new Custom Start Page Manager is located here:



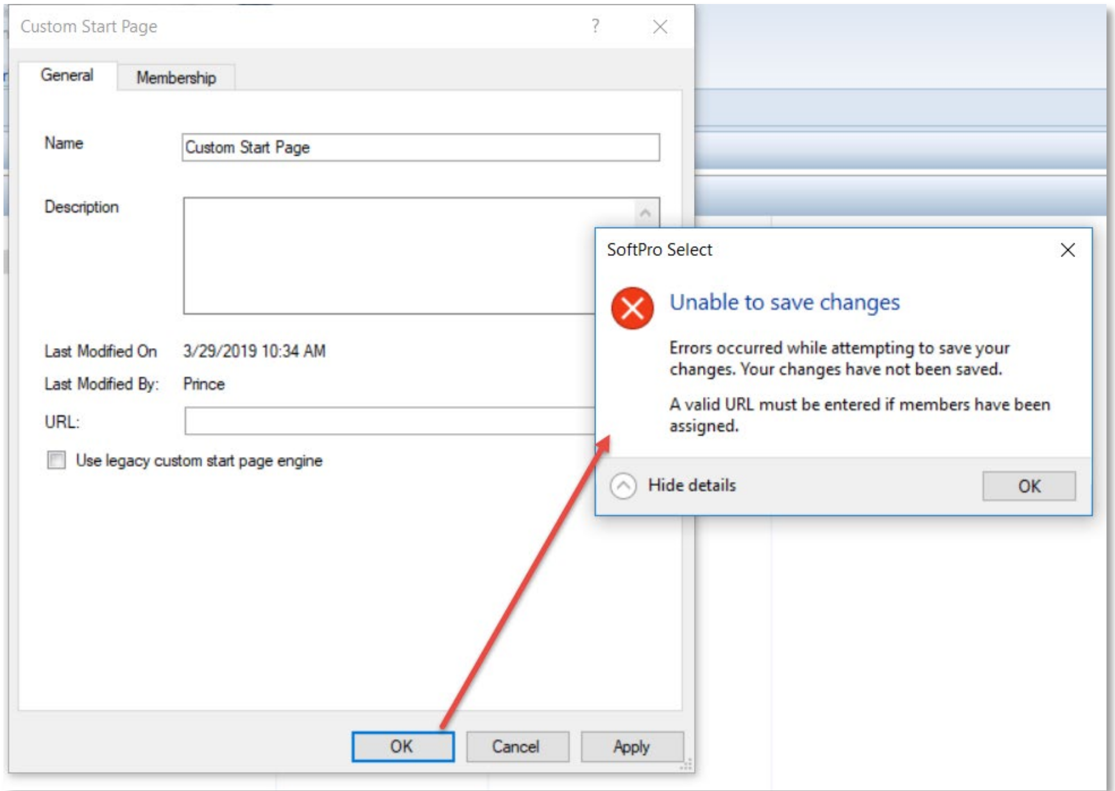
- When a different start page should display, the Admin should enter a URL for that page. This will replace the entire start page. The new start page engine is supported by a chromium browser. If the legacy custom start page engine should be used, select the **Use legacy custom start page engine** checkbox. This is only enabled when a URL is entered.



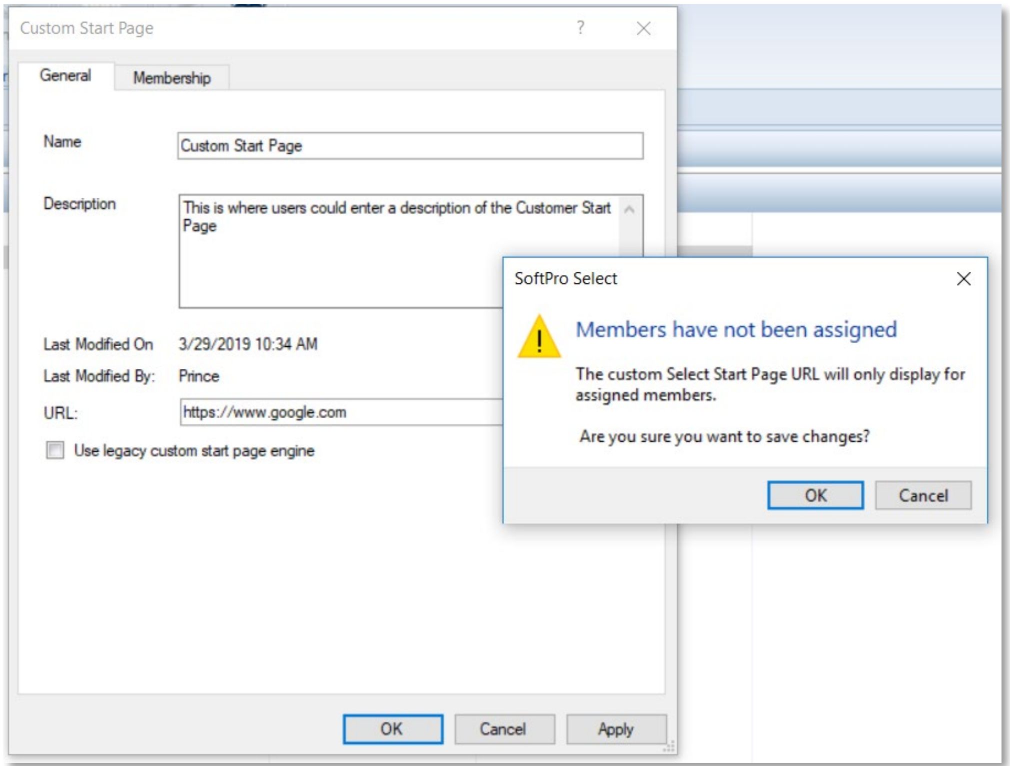
- When a custom URL is entered, only users/groups that have been assigned on the Membership tab will see the custom start page.



- If members have been assigned but no URL is entered, the Admin user will see the following error message:



- If a URL is entered but no members have been assigned, the user will see the following warning. The information could still be saved, however the custom start page will not display until members are assigned. Once members are assigned, only the members assigned will see the custom start page. All other users will see the 'out of the box' start page.


Custom Start Page
General
Membership
Name
Custom Start Page
Description
This is where users could enter a description of the Customer Start Page
Last Modified On
3/29/2019 10:34 AM
Last Modified By:
Prince
URL:
https://www.google.com
Use legacy custom start page engine
OK
Cancel
Apply
SoftPro Select
Members have not been assigned
The custom Select Start Page URL will only display for assigned members.
Are you sure you want to save changes?
OK
Cancel

Custom Start Page Manager Permissions

There is a new permission for the Custom Start Page Manager, found here: