SoftPro Select 4.6.11
(ivy20210527r2)

Release Notes | June 03, 2021

Revised October 04, 2021

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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.

4.6.1 (6/24/2019)

- **Automation**
  - The automation wizard has a new action that allows you to assign a specific trust account to the order.
  - A new option allows you to send an email notification in the event of a process failure.
- **Plug-ins**
  - Added support for shared assemblies across Shell packages in the same plug-in.
  - Removed the “News Feed Synchronization” job and relevant artifacts from the system.

4.6.2 (8/14/2019)

- **Bug fix**
  - Fixed a deadlock issue when querying to update or remove a conversation.

4.6.3 (9/20/2019)

- **Bug fixes**
    - Fixed an issue where the Property screen was not loading in upgraded orders created with version 4.5.0.
    - Resolved an issue with new 360 Automation processes not activating.

4.6.4 (10/11/2019)

- **Internal release - bug fix**
    - This was an internal release to correct an error that occurred when upgrading to version 4.6.1 and the installation package contained multiple plug-ins.

4.6.5 (12/16/2019)

- **Documents and Reports**
    - Added a new SPAdmin report for Redirected Documents/ReadyBlocs.
    - Added a new report to show all documents or reports that are pinned in SPAdmin.
    - Commercial Settlement Statement documents have been reformatted to an HTML version, and are available in ReadyDocs.
- **Bug fixes**

4.6.6 (1/23/2020)

- **Bug fixes**
    - Downloaded plugins were not visible; Select was not completely removing the previous instance of shell plugins when in debug mode.
    - Plugins were not visible or were not working properly when multiple plugins referenced a common library.

4.6.7 (1/31/2020)

- **Bug fix**
    - The plugin button was not visible when installing new plugins.

4.6.8 (2/13/2020)

- **Bug fix**
    - Large sized plugins on install and updates were taking a significant time to load on initial launch of Select client.

4.6.9 (12/11/2020 rev 10/04/21)

- **Bug fixes**
    - Out of Memory error due to core.Conversation table failing to clear.
    - ~~Updated F2 behavior when used to clear a field when two users are in the same file.~~
- **Pro1099**
    - Updated to include changes for tax year 2020.

4.6.10 (03/08/2021 Updated 06/03/2021)

- **General**
    - Not released due to an adoption blocker

4.6.11 (06/03/2021)

- **General**
    - Functional improvement patches
- **Order Tasks**
    - A new milestones check box added to the Checklist Tasks and Requested Tasks screens.
- **Documents**
    - Updated and new documents added.
- **Reports**
    - Updated and new reports added.
- **Bug fixes**

ProForm

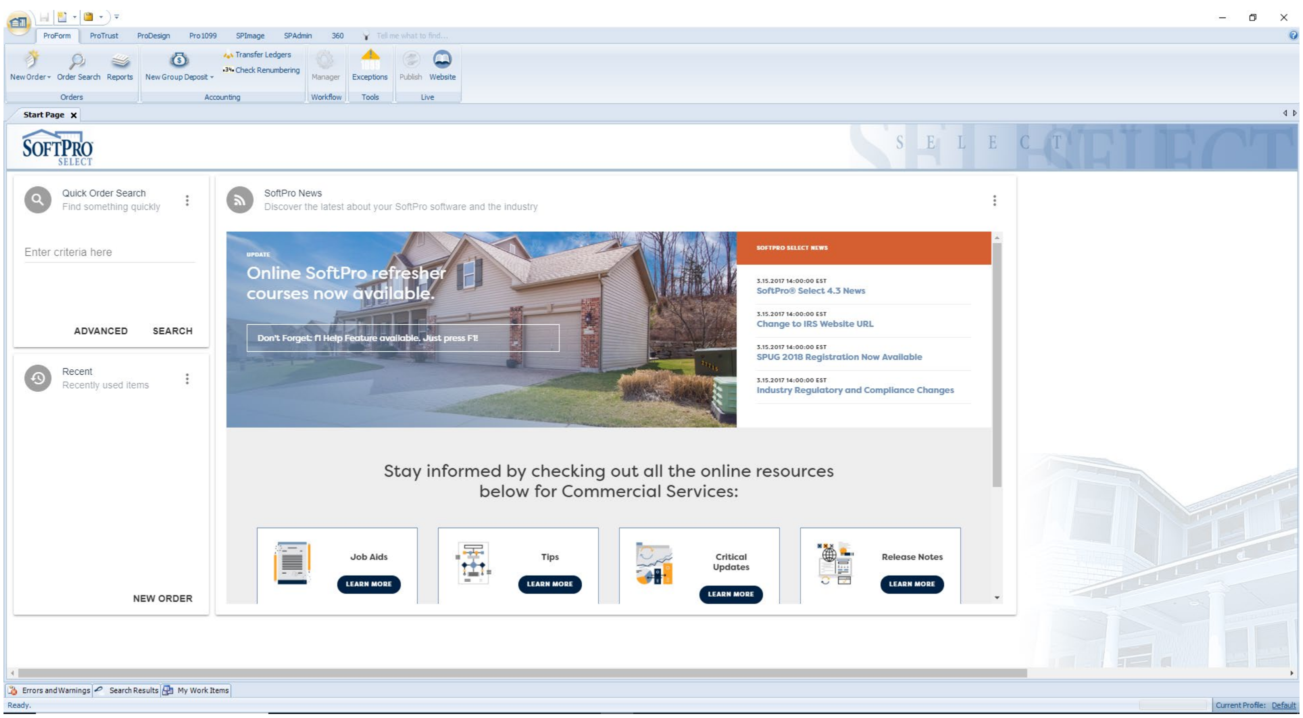
Select Start Page

- 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

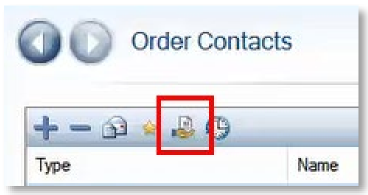
If you have a *custom* start page, a new Custom Start Page Manager has been developed. This is an optional screen and only needs to be enabled when a different start page should be used. For more information, see Custom Start Page Manager in the SPAdmin section.

Order

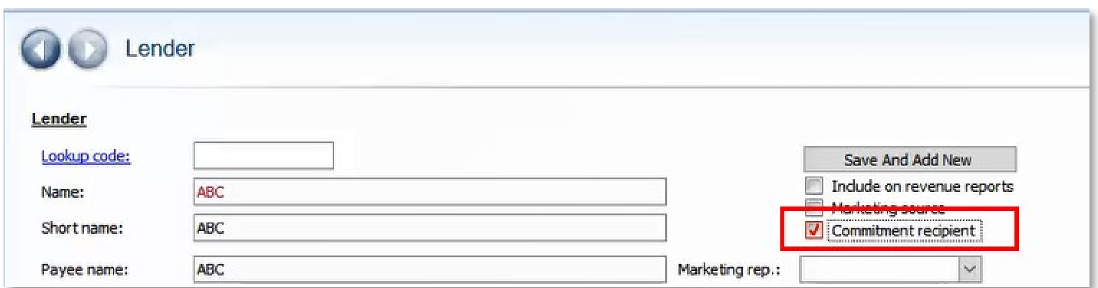
Order Contacts

Commitment Recipient

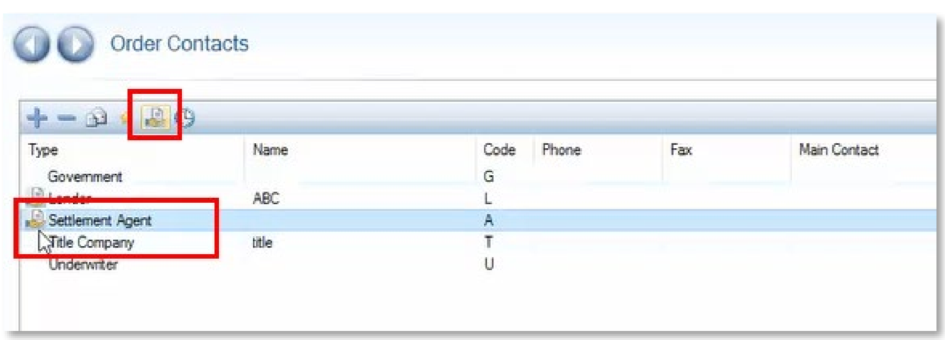
- The **Commitment Recipient** icon is located on the Order Contacts toolbar.



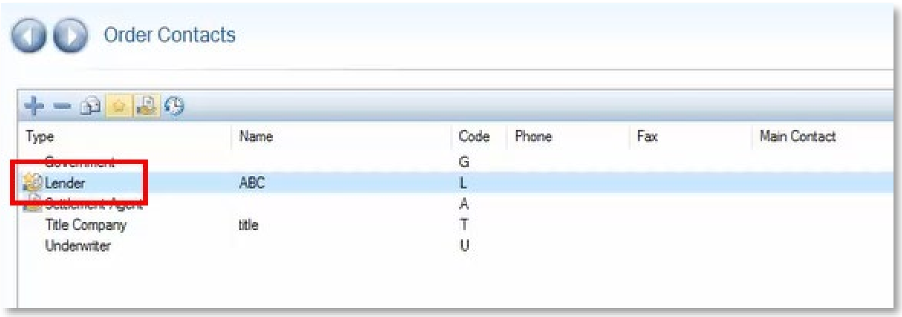
- The **Commitment Recipient** checkbox is available on all Order Contact screens.



- You can add it to the lookup table for future reference.



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



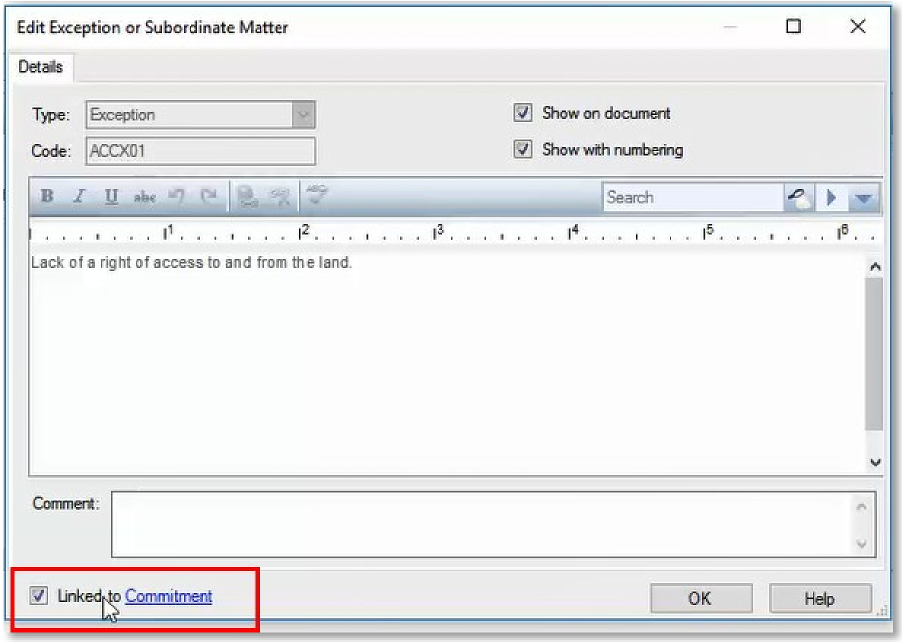
- The License ID was not defaulting for contact people when that person was added to a contact automatically via the Escrow Officer/Closer dropdown selection; *resolved*. 506843

Title

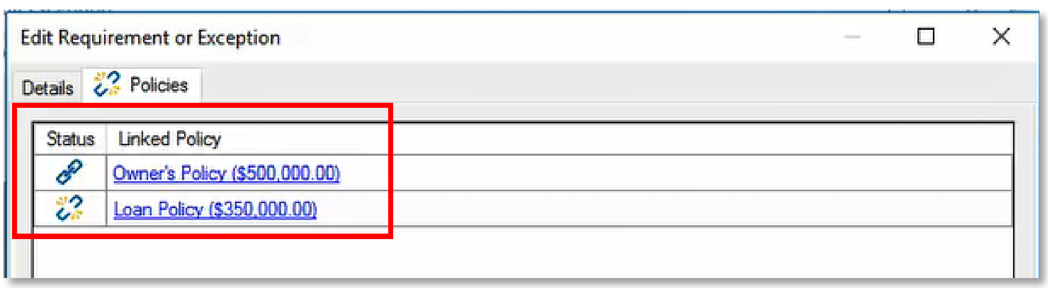
Linking Policy and Commitment Exceptions

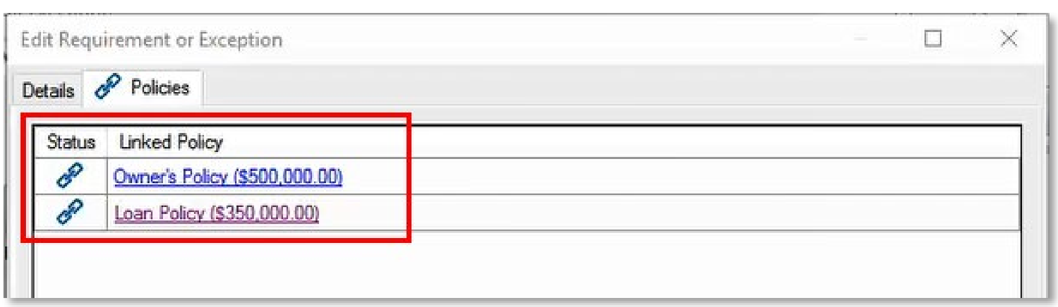
This is a new option for policy exceptions to be linked to their related commitment exceptions and requirements.

- 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**.



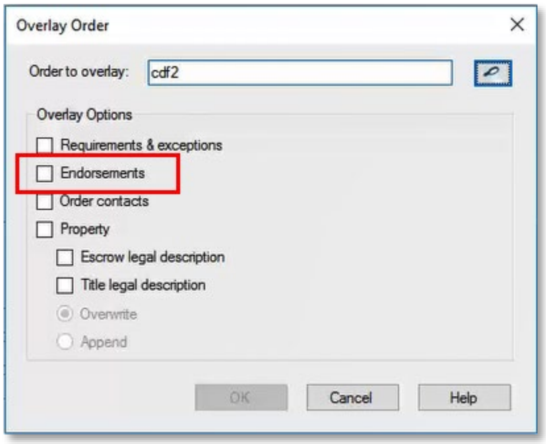
  - When defaulted to checked, anytime you select **Start Policy** to pull your commitment exceptions to the policy, or select to **Import** your exceptions onto your policy from the commitment, the exceptions would automatically be linked.
- Click on the **Linked to Commitment** link, and it opens the 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.



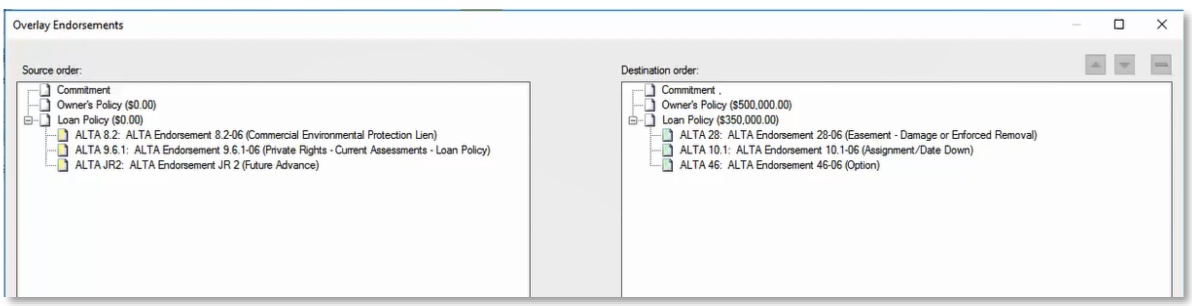


This new option allows you to take an order than has endorsements in it and overlay the endorsements into another order.

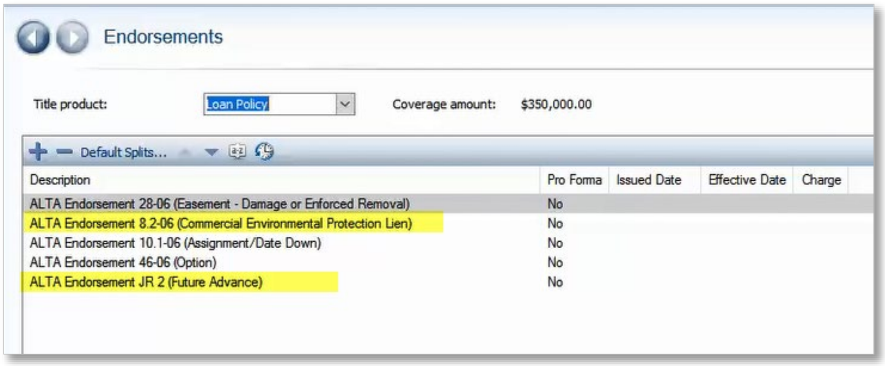
- The new overlay **Endorsements** option is available in the Overlay Order pop-up.



- 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.

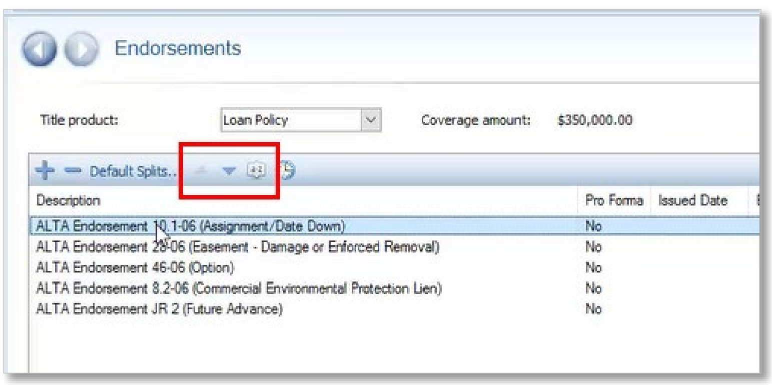


- To modify the endorsements you've added to the Destination order, you can:
  - Remove any endorsements using the minus button.
  - Move an item up or down using the up and down arrows.
- The new endorsements that were just added appear in the Endorsements grid.



<u>*Sort Endorsements*</u>

- 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.

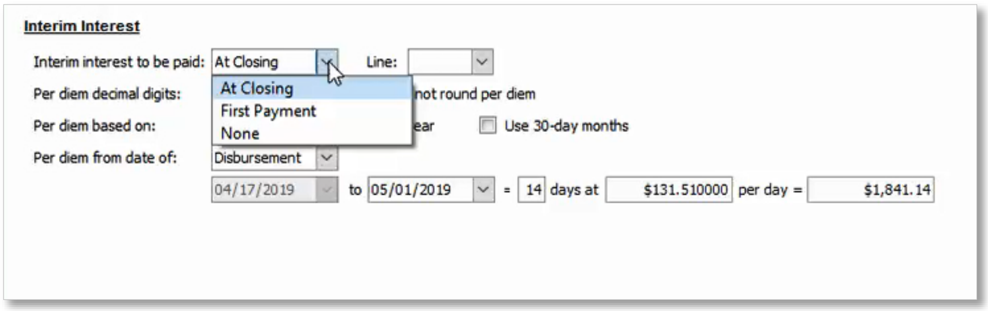


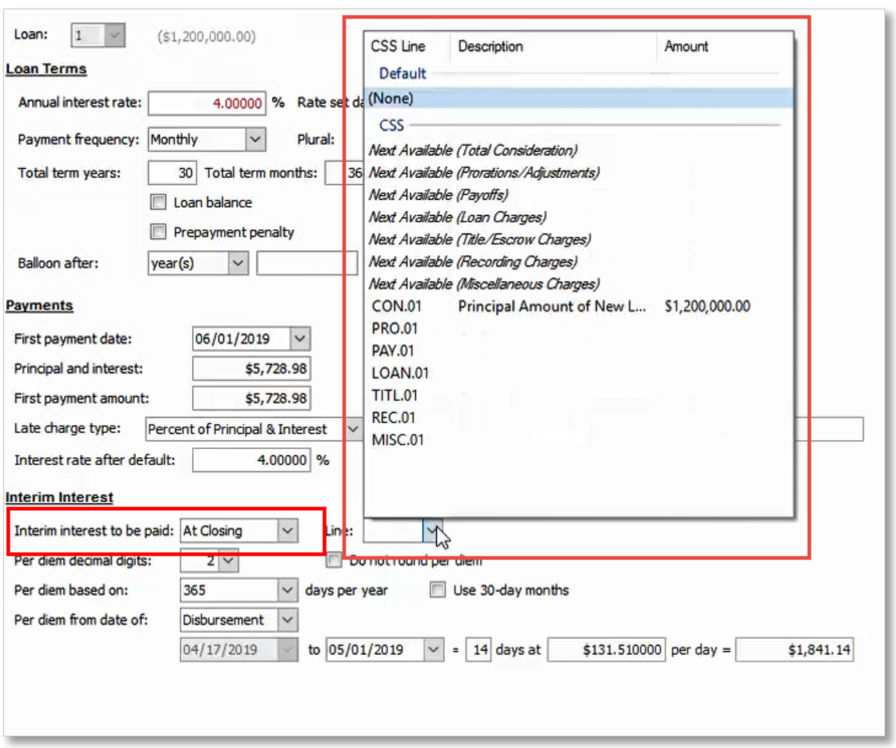
- The Loan Policy Premium was calculating incorrectly when the Owner's policy coverage is greater than Loan Policy coverage, instead of the "Premium to Split" amount showing as zero, it was calculating based on the rate table; *resolved*. *11315*
- An error was thrown when attempting to overlay a subordinate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

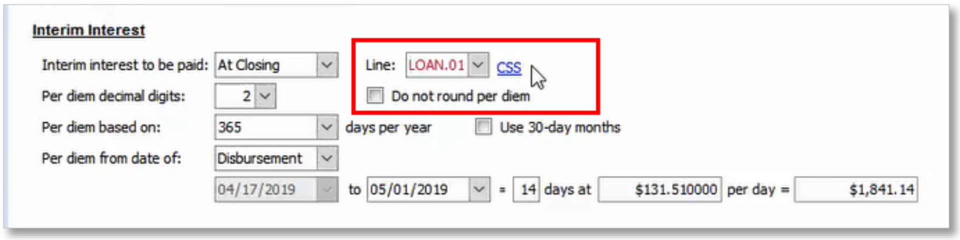
Commercial

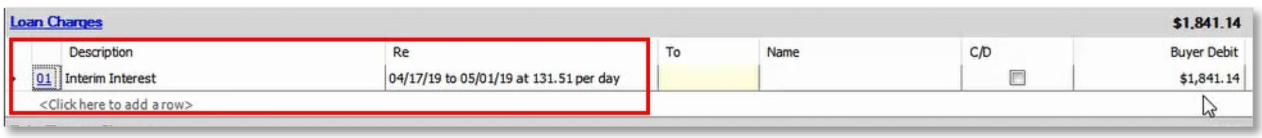
CSS Interim Interest

- 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.









Documents & Attachments

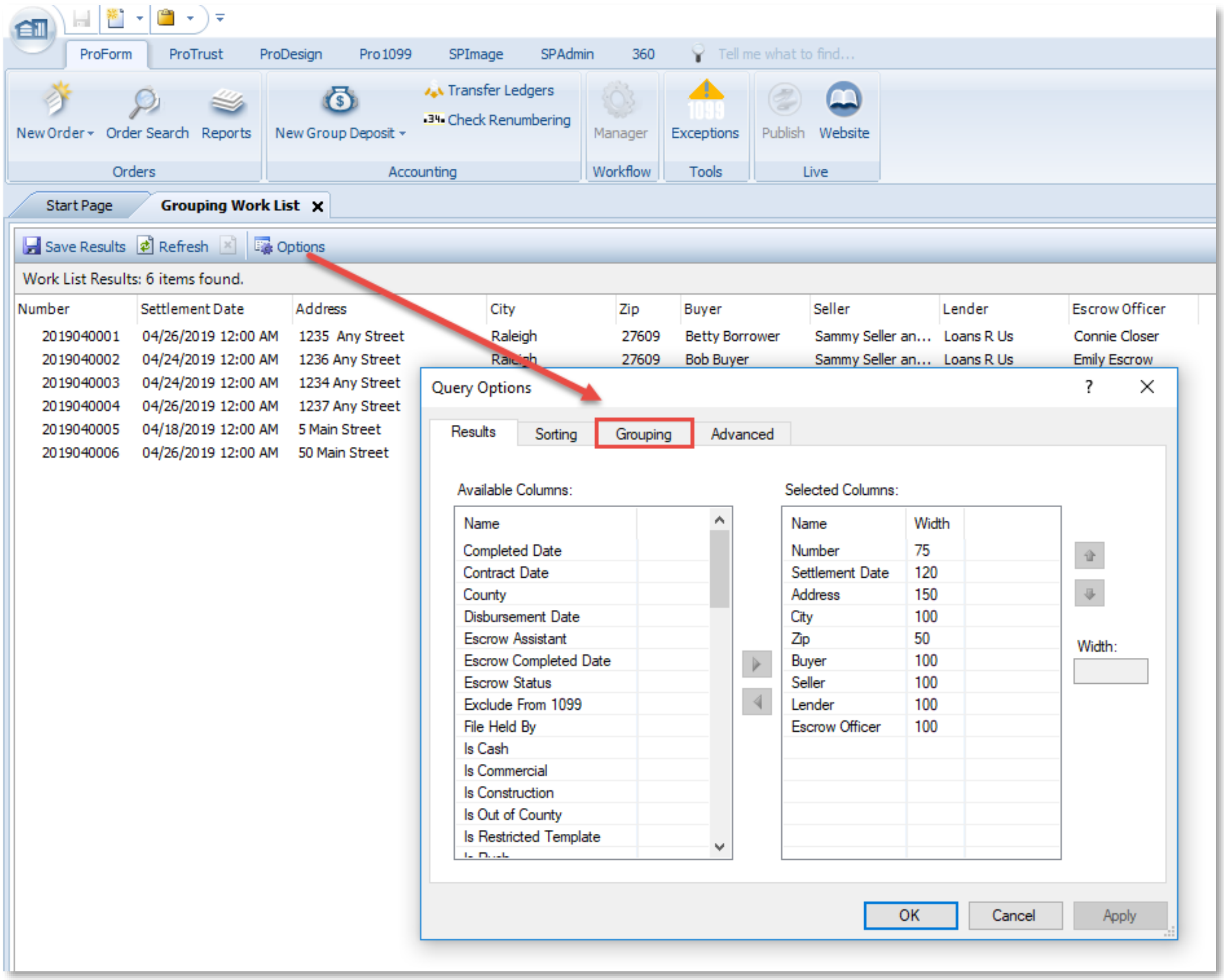
- The Drag and Drop function from the Select Attachments to the desktop was not working properly, requiring multiple attempts, and sometime incurring an error; *resolved*. *11046*
- Moving an attachment from one folder to another could result in duplicate copies and an error message when trying to open 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

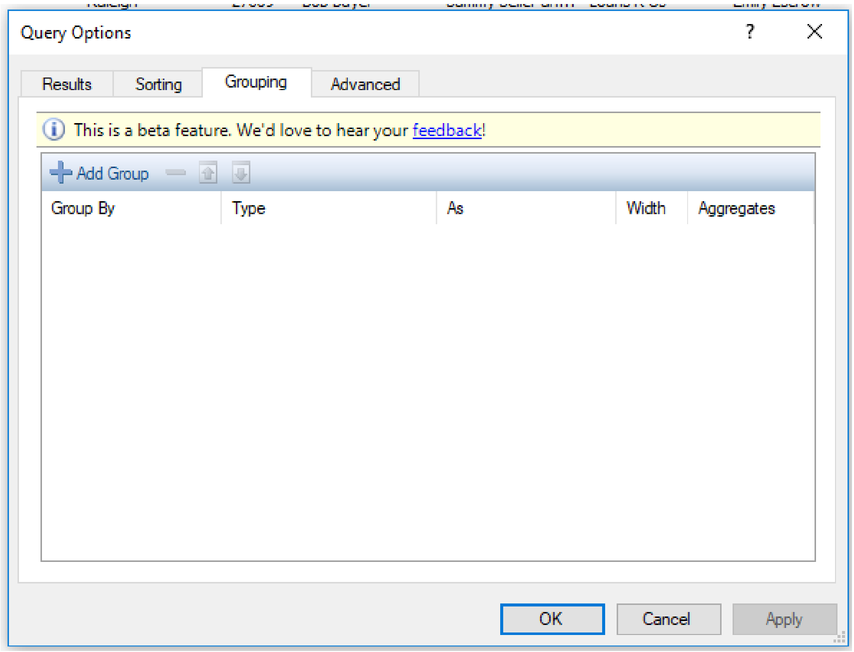
- Provides the ability to group worklist results
- Users now have the ability to provide feedback on this feature

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.

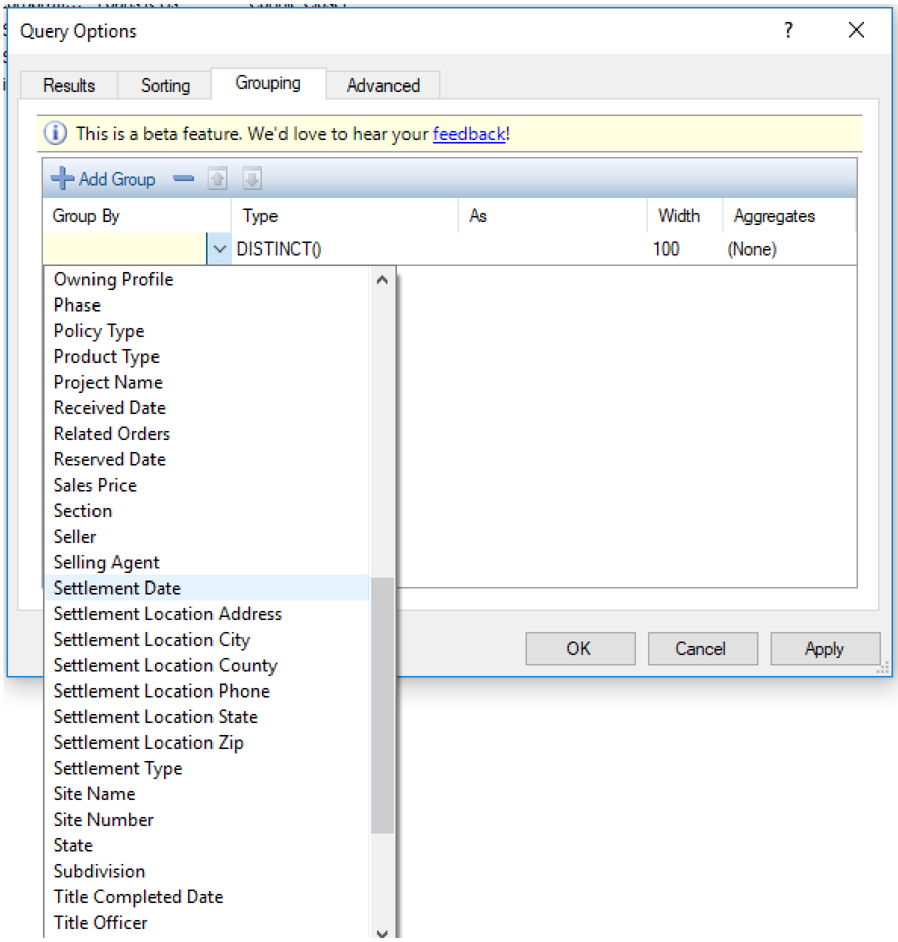
- After running a Work List query, click **Options** to see a new Grouping tab on the dialog.



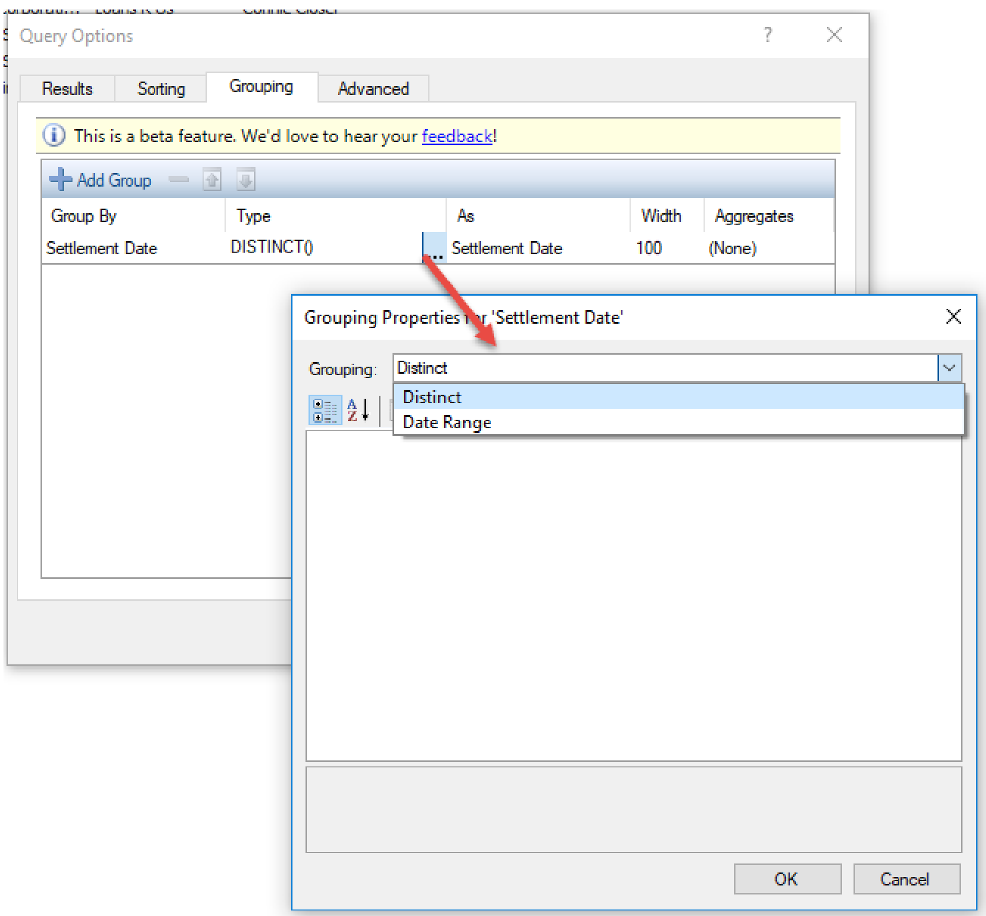
- Click the **Grouping** tab to enter new groupings.



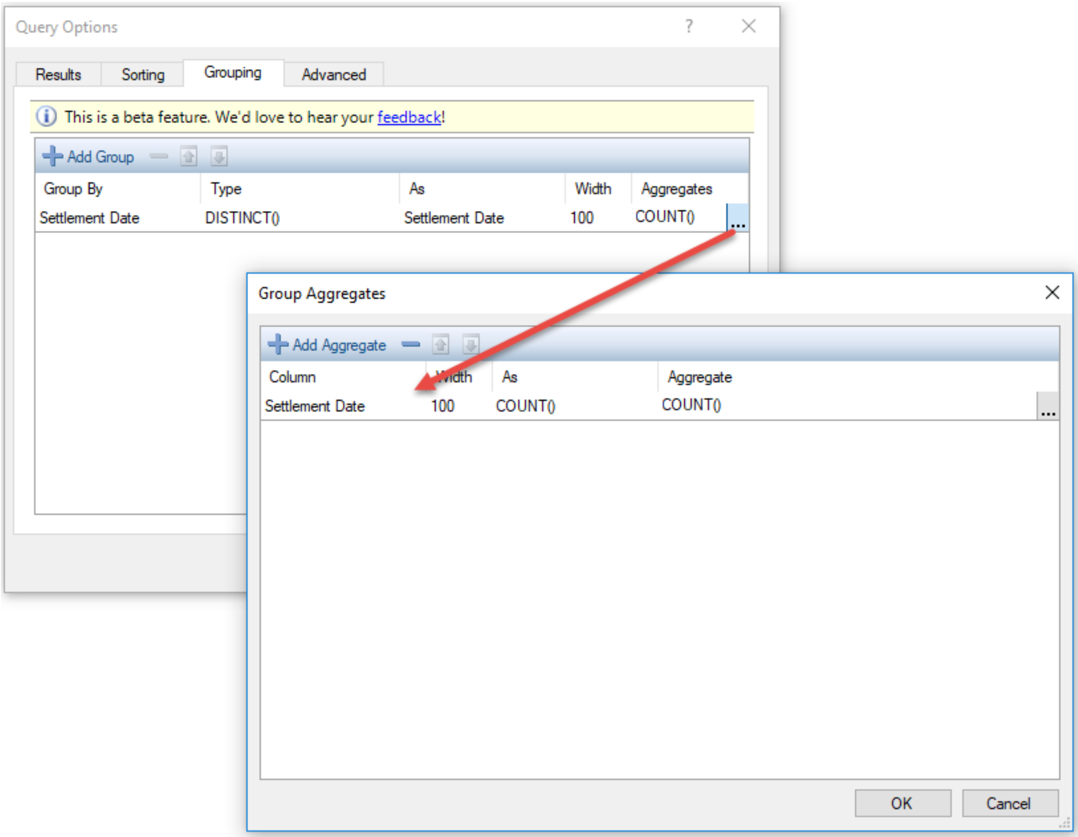
- To add a new grouping, click the **+Add Group** button.
- Select a method to group by from the Group By dropdown list. For example, to group results by Settlement Date, click **Settlement Date**.

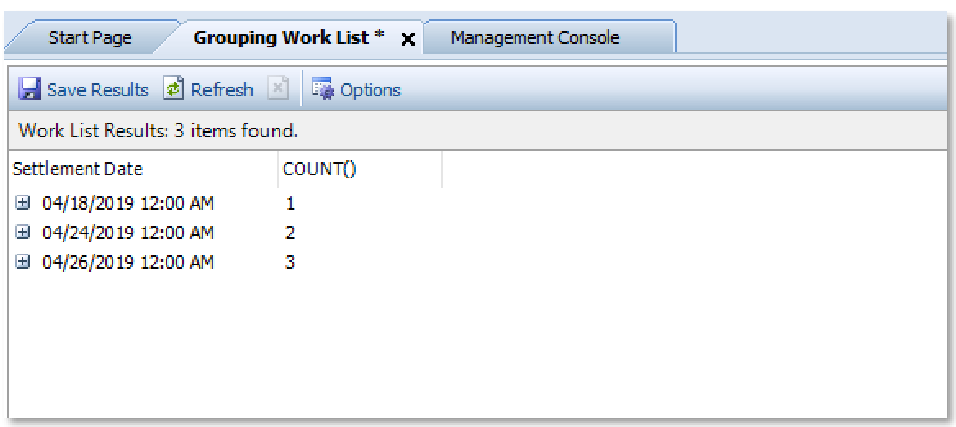


- For a date grouping, you can group by distinct dates or by a date range. In this example, the results will group each date separately.

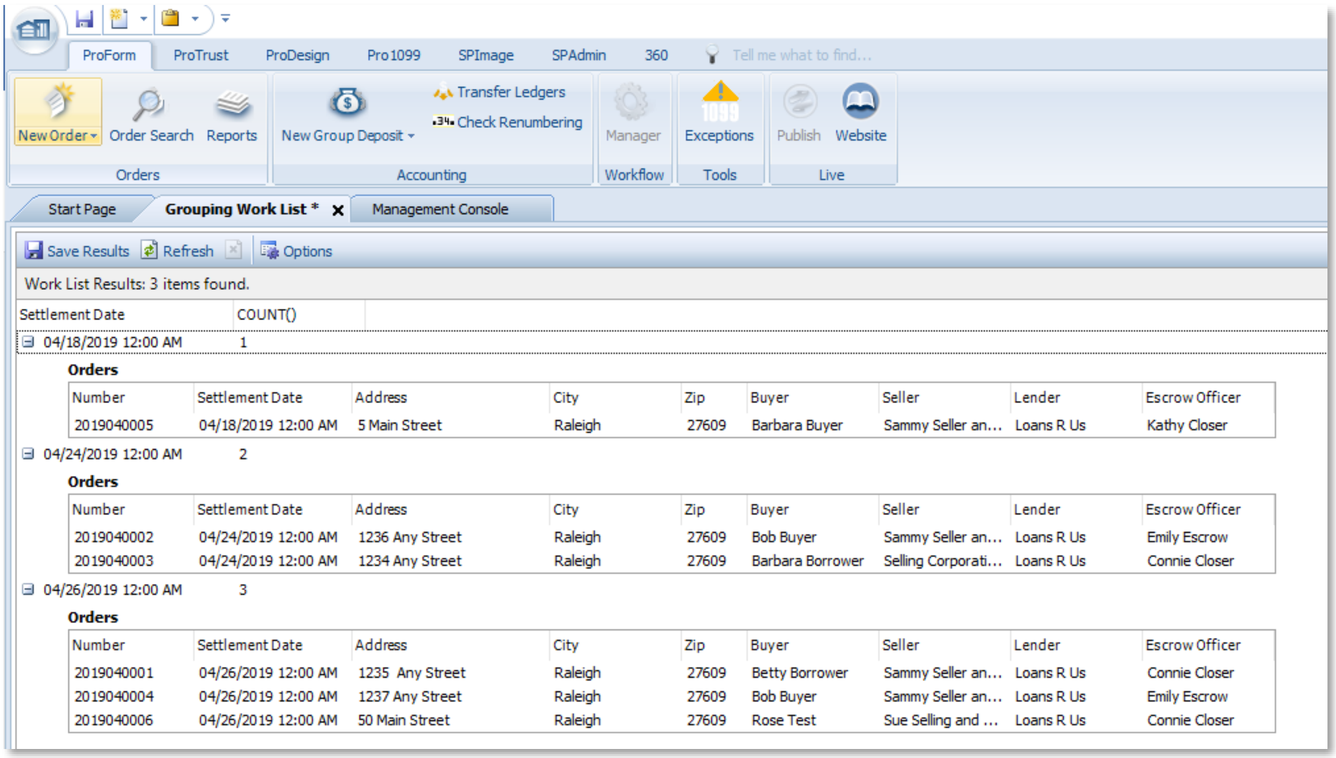


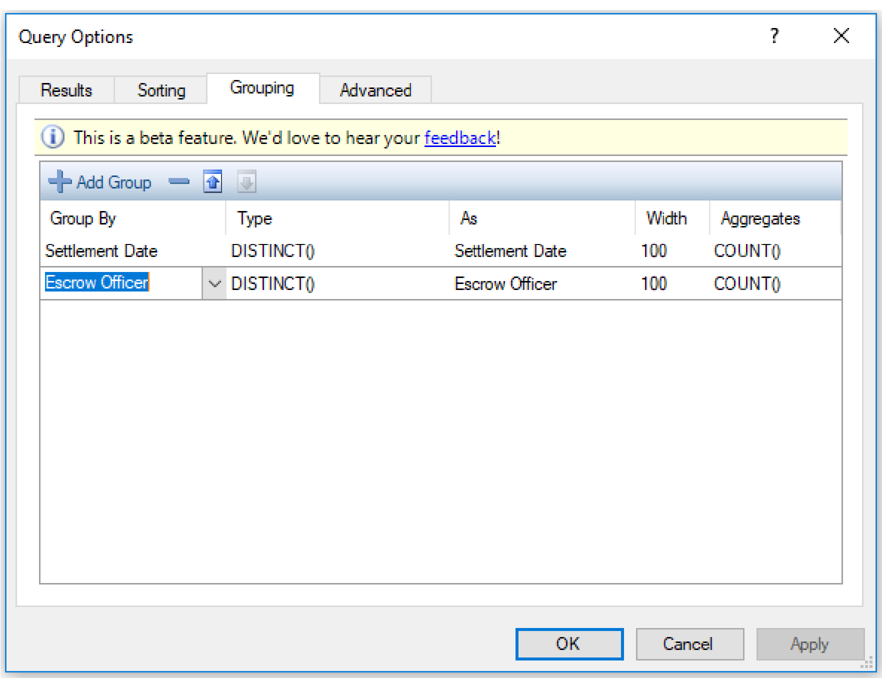
- You can also specify how to display the totals. In this example, the count will display the number of files closing for each Settlement Date.



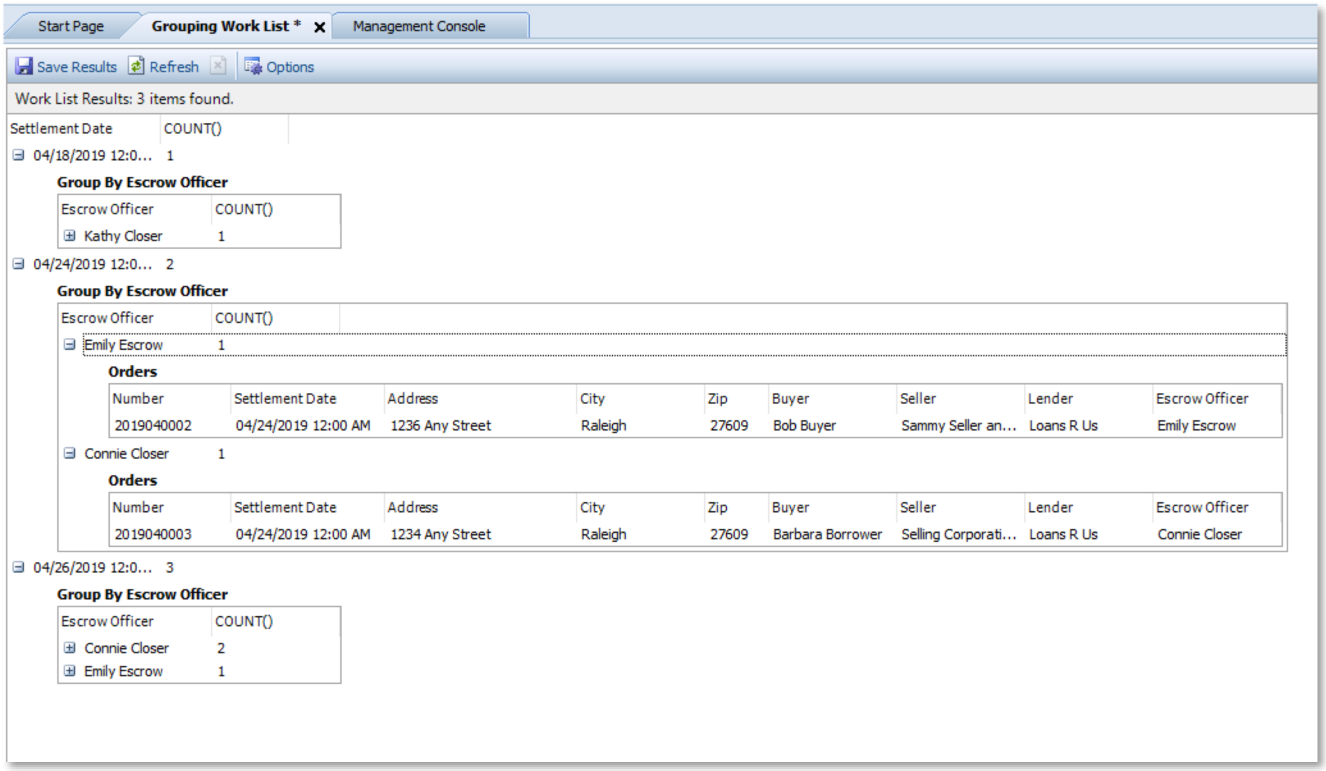


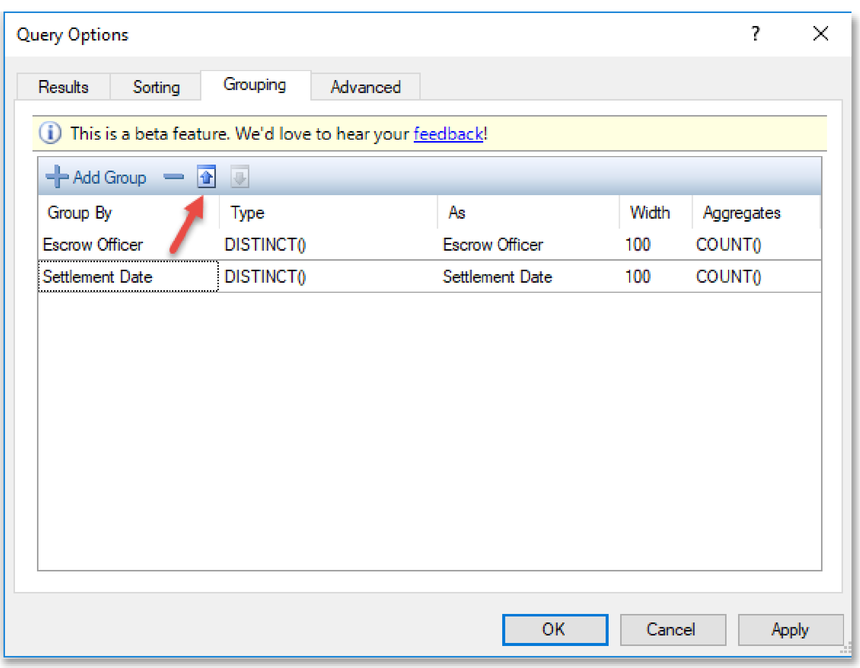
- Expand each group to see the details for each day.

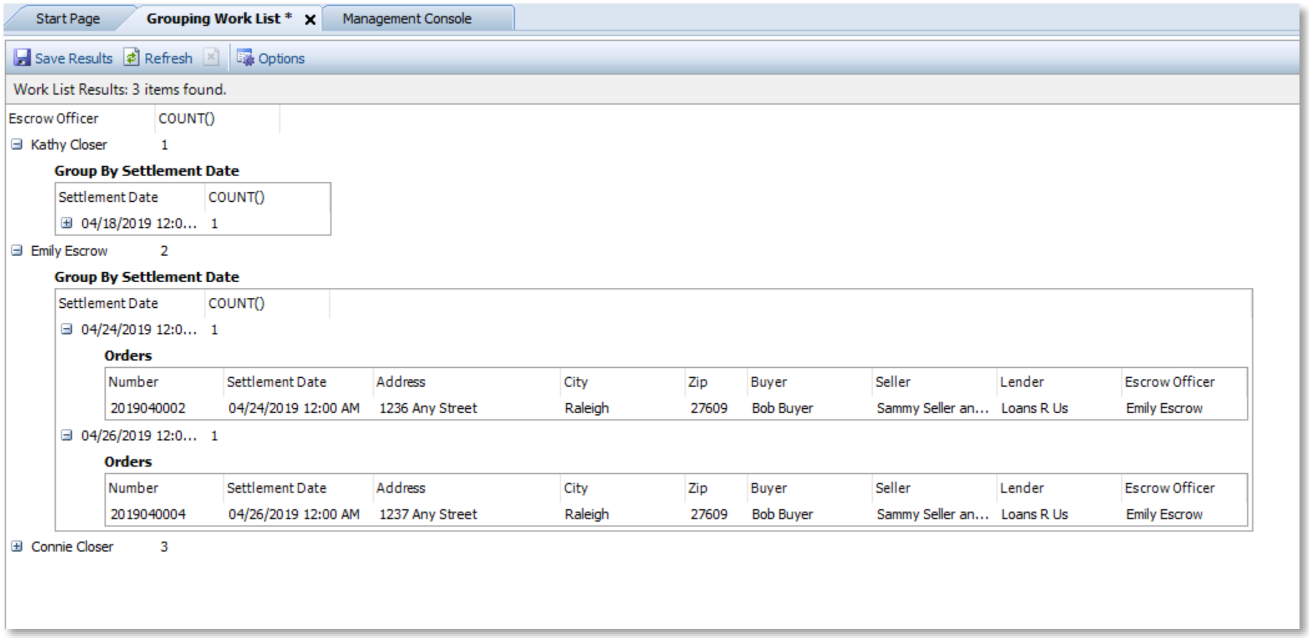




- Click **Refresh** to see the results grouped by Settlement Date and then by Escrow Officer.

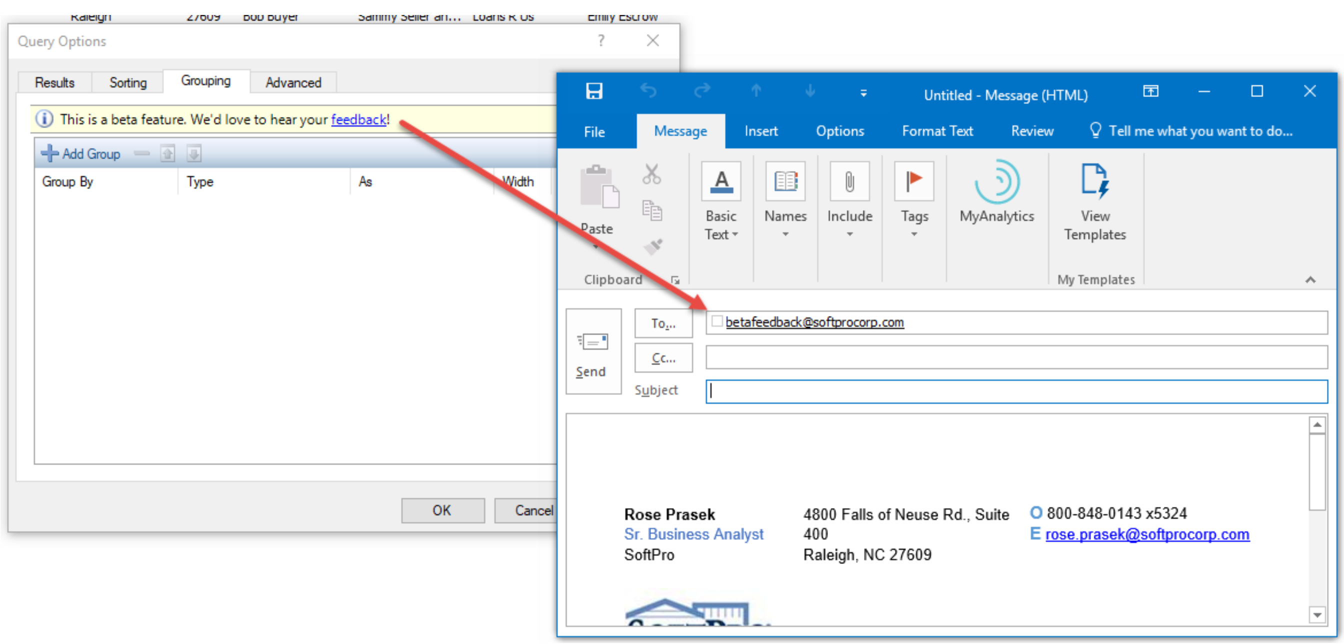






Provide Feedback to SoftPro

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

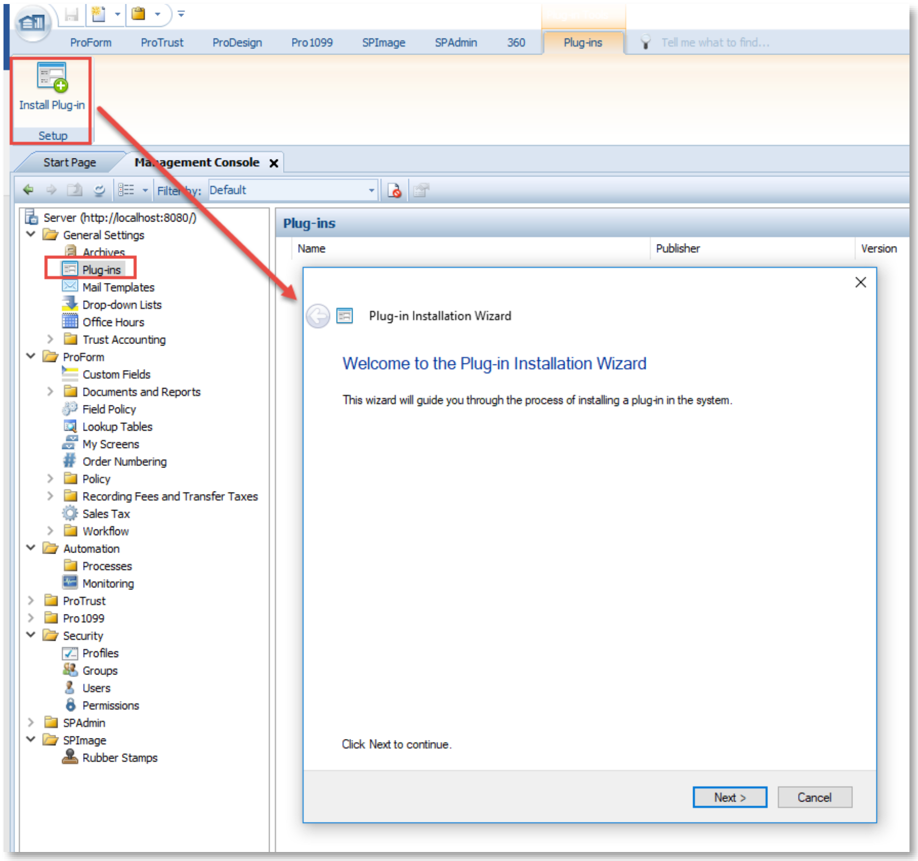
Plug-ins

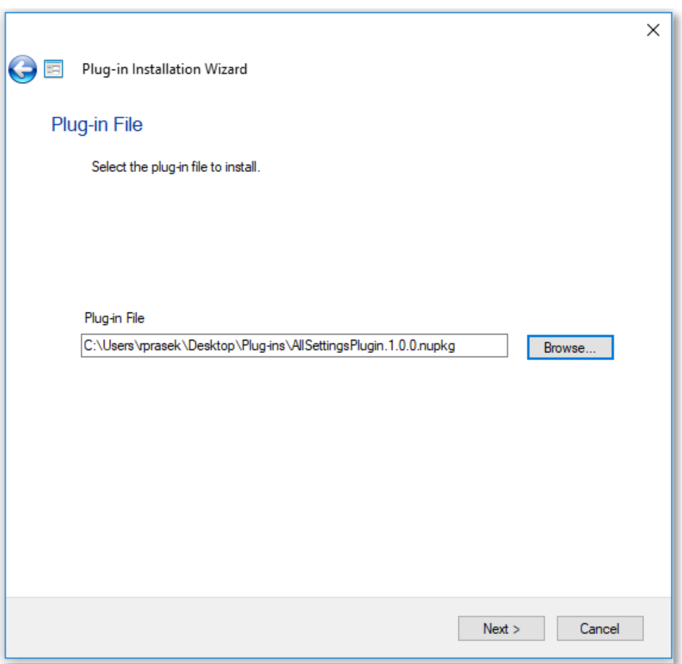
The 4.4 release unified the packaging and deployment of custom integrations through the concept of a plug-in. Version 4.6 includes the following enhancements to the plug-ins:

- 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

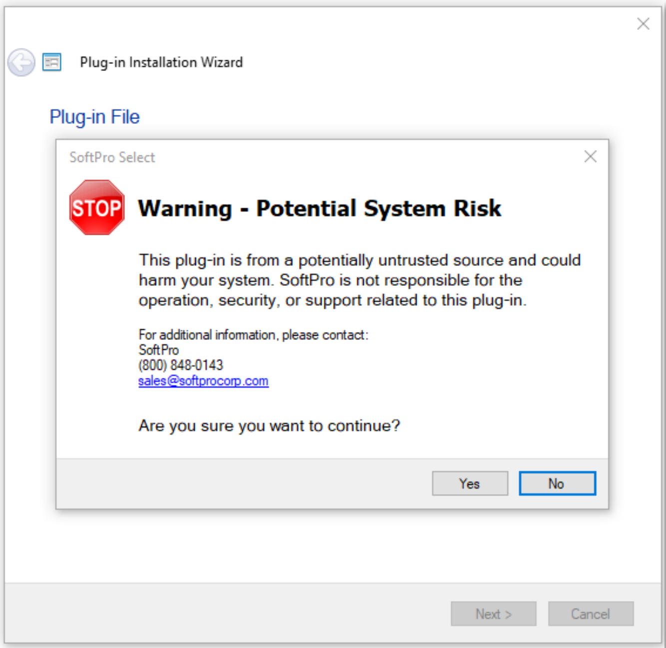
The Plug-in Installation Wizard can be accessed here:

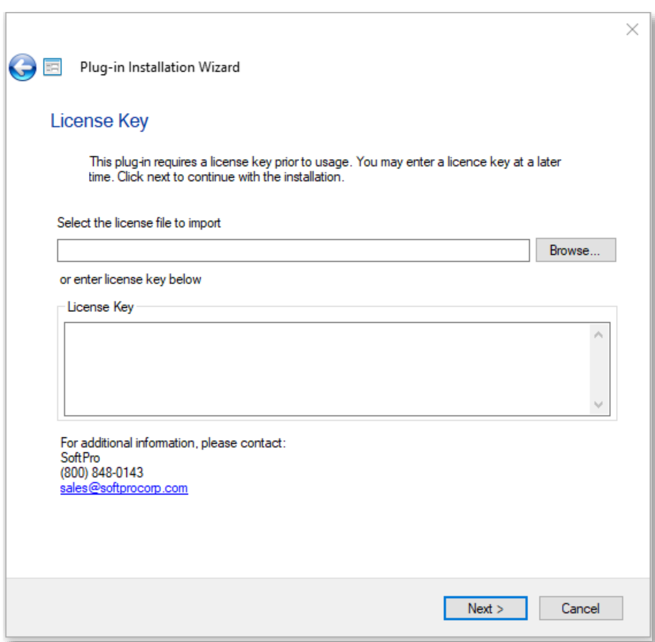
SPAdmin > General Settings > Plug-ins > Install Plug-in


ProForm
ProTrust
ProDesign
Pro1099
SPImage
SPAdmin
360
Plug-ins
Tell me what to find...
Install Plug-in
Setup
Start Page
Management Console
Filter by: Default
Server (http://localhost:8080/)
General Settings
Archives
Plug-ins
Mail Templates
Drop-down Lists
Office Hours
Trust Accounting
ProForm
Custom Fields
Documents and Reports
Field Policy
Lookup Tables
My Screens
Order Numbering
Policy
Recording Fees and Transfer Taxes
Sales Tax
Workflow
Automation
Processes
Monitoring
ProTrust
Pro1099
Security
Profiles
Groups
Users
Permissions
SPAdmin
SPImage
Rubber Stamps
Plug-ins
Name
Publisher
Version
Plug-in Installation Wizard
Welcome to the Plug-in Installation Wizard
This wizard will guide you through the process of installing a plug-in in the system.
Click Next to continue.
Next >
Cancel

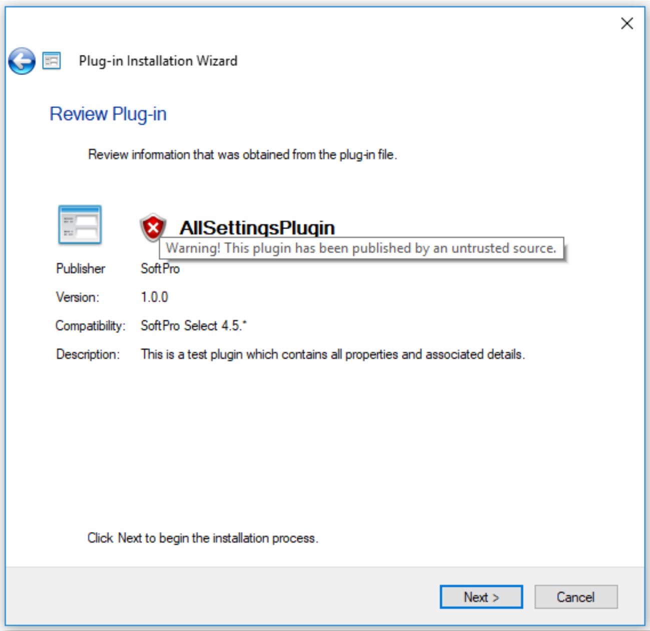

Plug-in Installation Wizard
Plug-in File
Select the plug-in file to install.
Plug-in File
C:\Users\vprasek\Desktop\Plug-ins\AllSettingsPlugin.1.0.0.nupkg
Browse...
Next >
Cancel

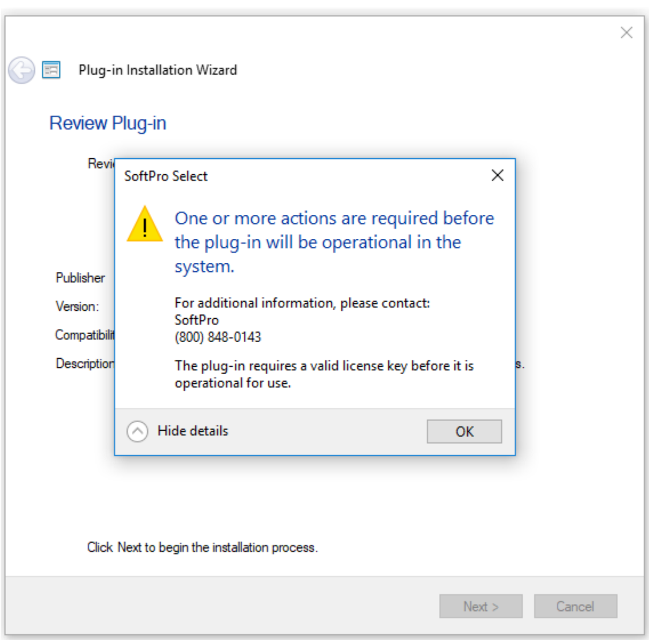
- If the plug-in has not been signed by SoftPro, a Warning will display to the Admin user. To stop the plug-in from installing, click **No**. Click **Yes** to continue installing the plug-in.



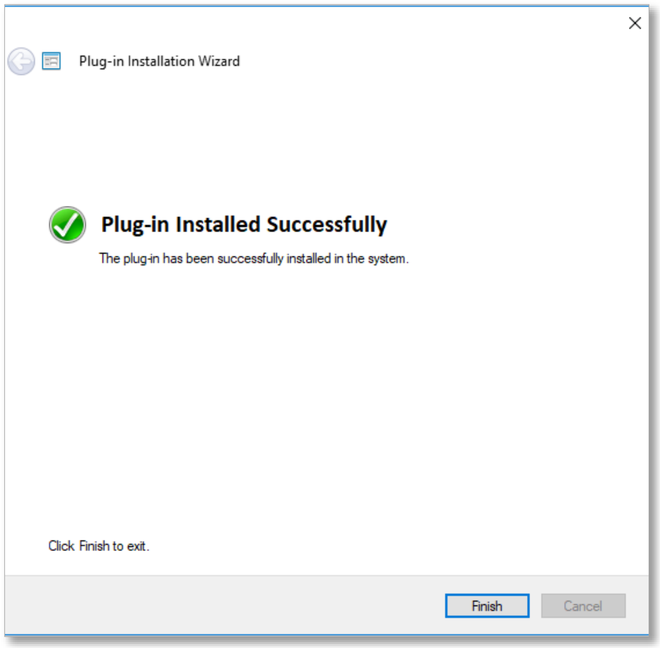


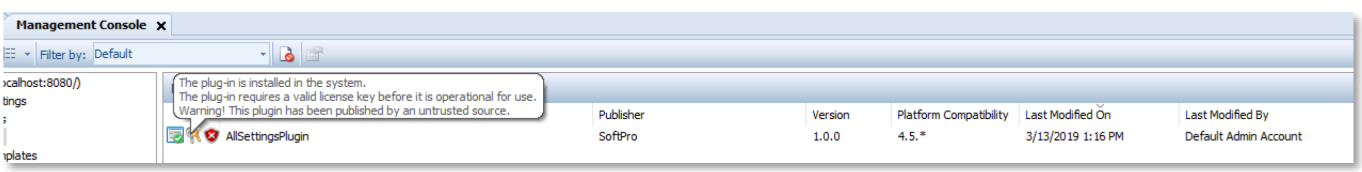
- Prior to installation, a Review of the Plug-in will display. For plug-ins that have not been signed by SoftPro, a warning will display.

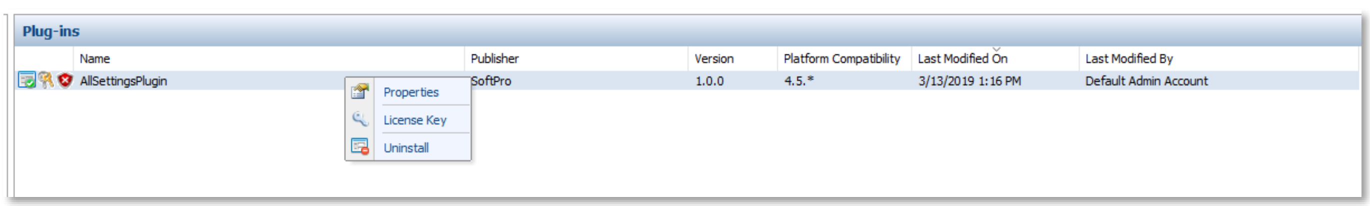


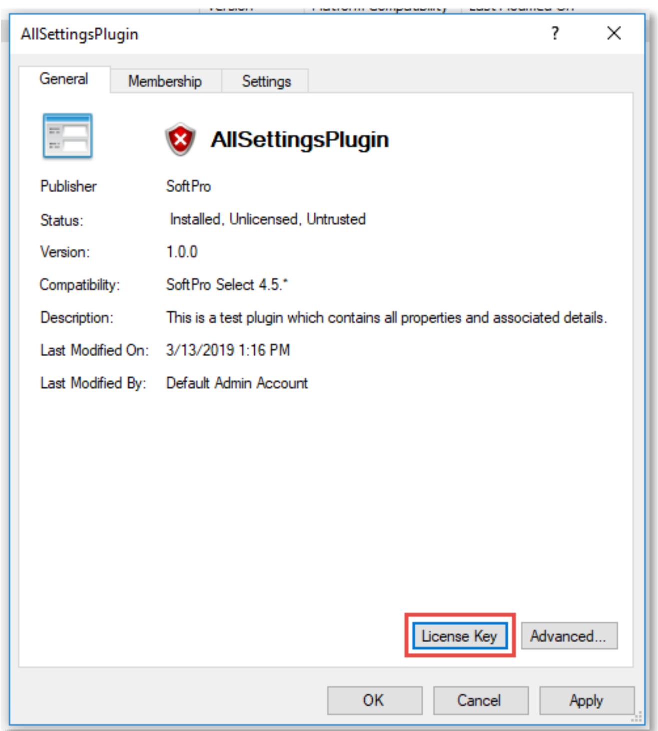


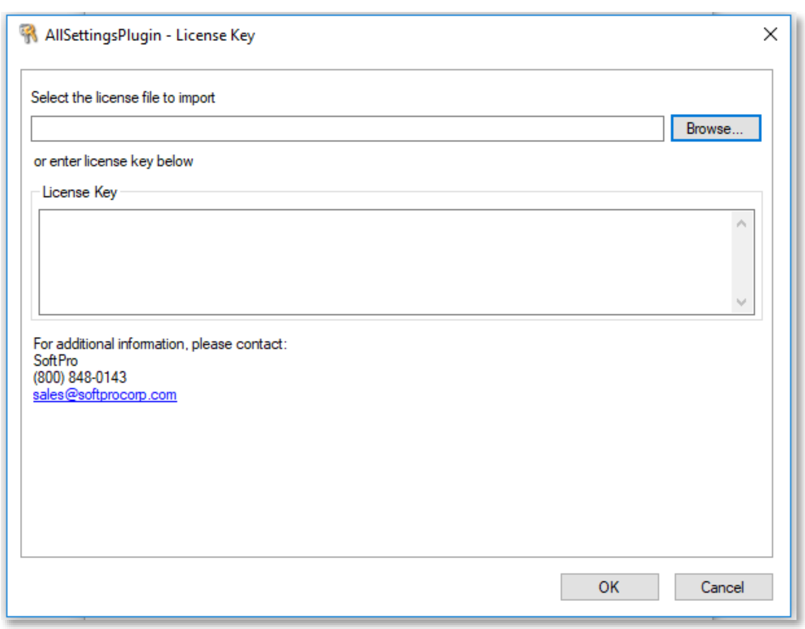
- When the plug-in has been installed successfully, the following screen will display.

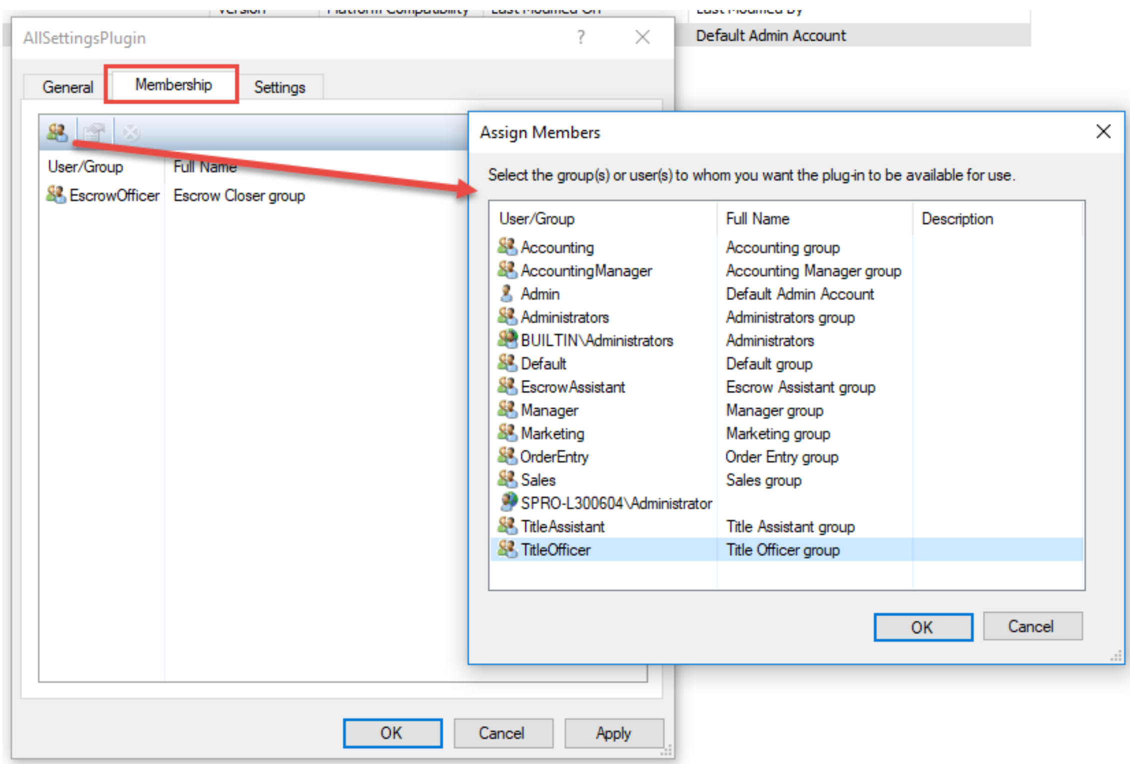


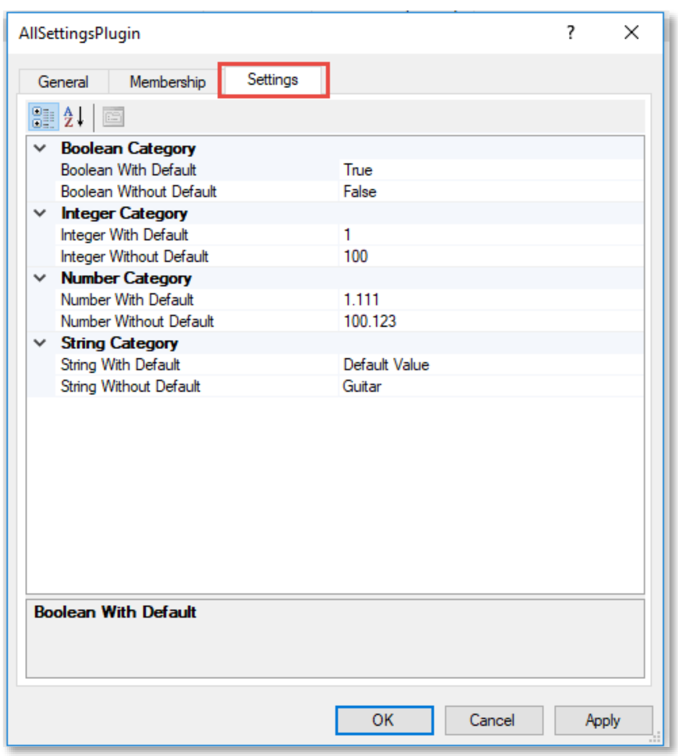




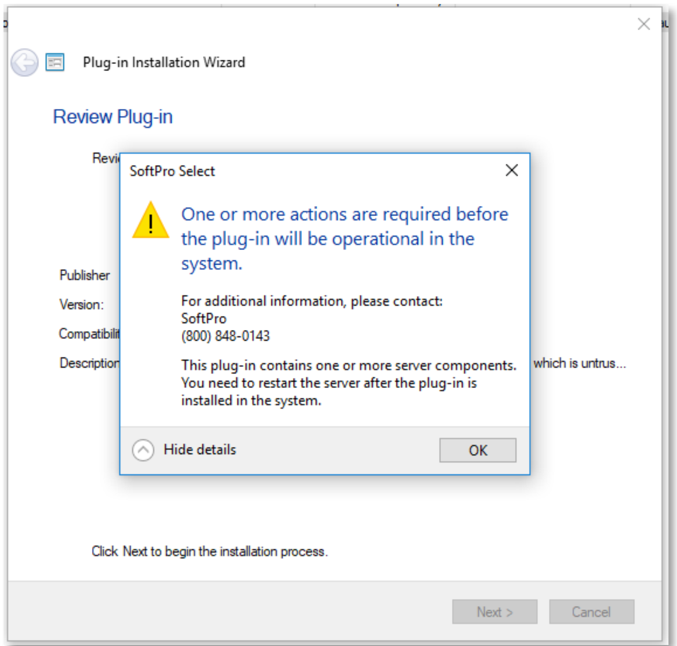

AllSettingsPlugin
General
Membership
Settings
AllSettingsPlugin
Publisher SoftPro
Status: Installed, Unlicensed, Untrusted
Version: 1.0.0
Compatibility: SoftPro Select 4.5.*
Description: This is a test plugin which contains all properties and associated details.
Last Modified On: 3/13/2019 1:16 PM
Last Modified By: Default Admin Account
License Key
Advanced...
OK
Cancel
Apply

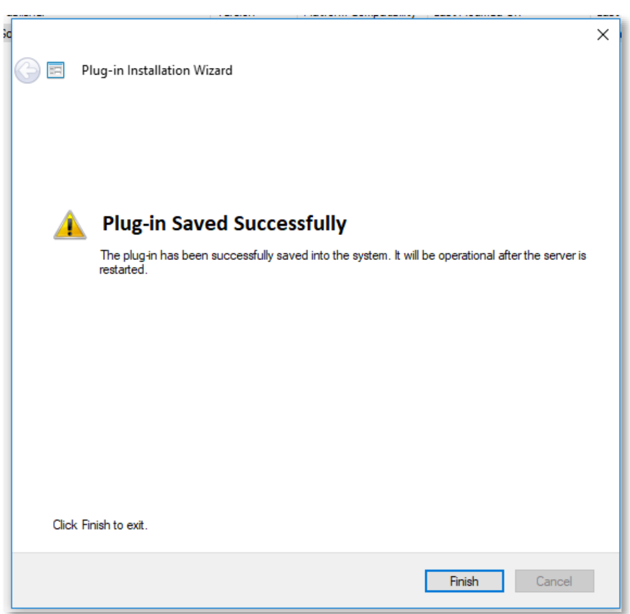

AllSettingsPlugin - License Key
Select the license file to import
Browse...
or enter license key below
License Key
For additional information, please contact:
SoftPro
(800) 848-0143
sales@softprocorp.com
OK
Cancel

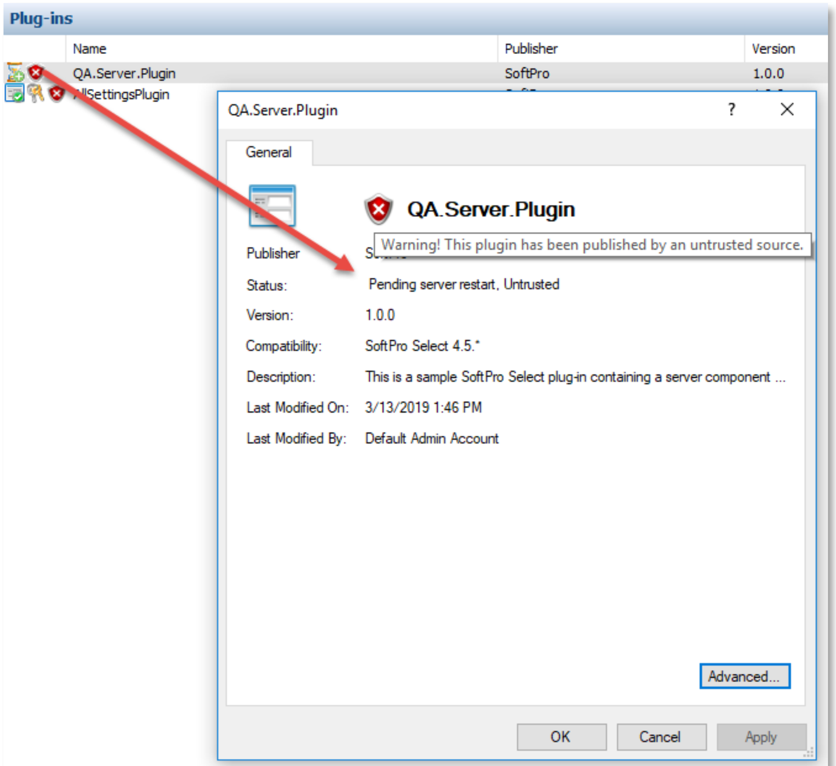

AllSettingsPlugin
General
Membership
Settings
User/Group
Full Name
EscrowOfficer
Escrow Closer group
OK
Cancel
Apply
Default Admin Account
Assign Members
Select the group(s) or user(s) to whom you want the plug-in to be available for use.
User/Group
Full Name
Description
Accounting
Accounting group
AccountingManager
Accounting Manager group
Admin
Default Admin Account
Administrators
Administrators group
BUILTIN\Administrators
Administrators
Default
Default group
EscrowAssistant
Escrow Assistant group
Manager
Manager group
Marketing
Marketing group
OrderEntry
Order Entry group
Sales
Sales group
SPRO-L300604\Administrator
TitleAssistant
Title Assistant group
TitleOfficer
Title Officer group
OK
Cancel

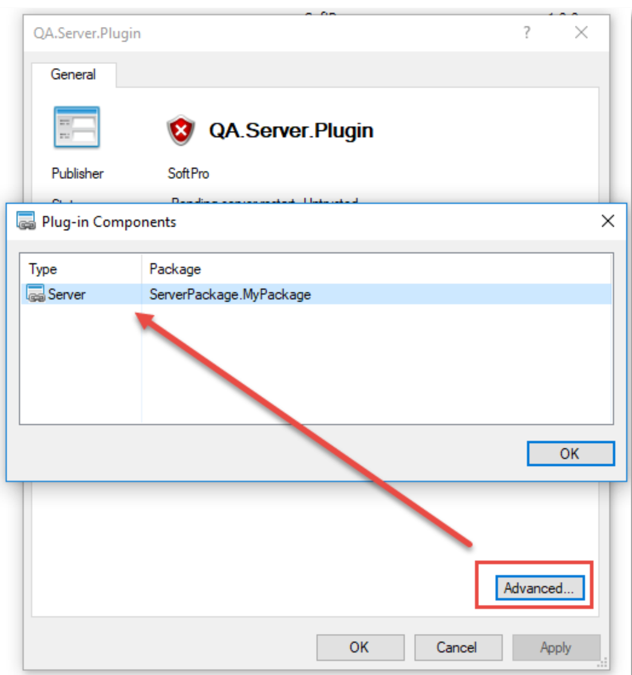

AllSettingsPlugin
General
Membership
Settings
Boolean Category
Boolean With Default
True
Boolean Without Default
False
Integer Category
Integer With Default
1
Integer Without Default
100
Number Category
Number With Default
1.111
Number Without Default
100.123
String Category
String With Default
Default Value
String Without Default
Guitar
Boolean With Default
OK
Cancel
Apply

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

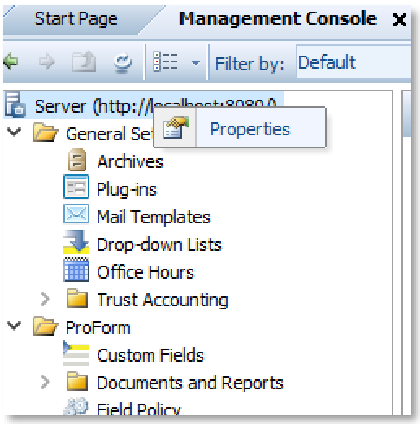


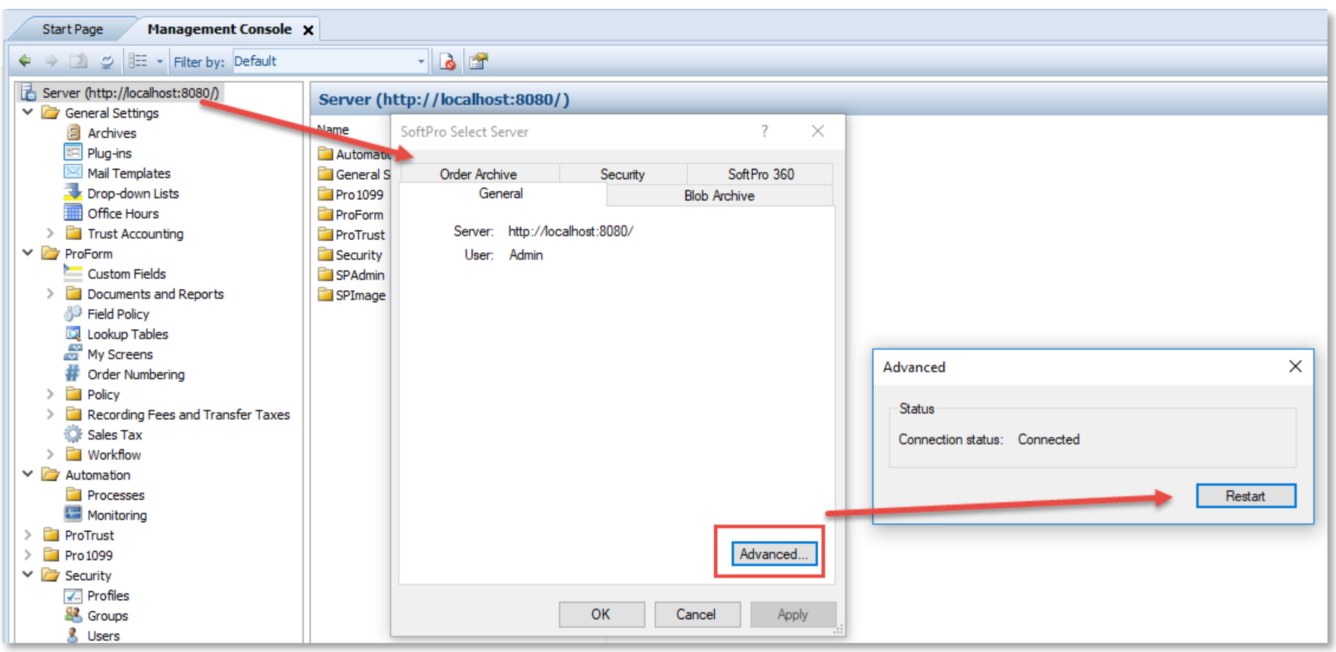



Plug-ins
Name
Publisher
Version
QA.Server.Plugin
SoftPro
1.0.0
AllSettingsPlugin
QA.Server.Plugin
General
QA.Server.Plugin
Warning! This plugin has been published by an untrusted source.
Publisher
Status:
Pending server restart, Untrusted
Version:
1.0.0
Compatibility:
SoftPro Select 4.5.*
Description:
This is a sample SoftPro Select plug-in containing a server component ...
Last Modified On:
3/13/2019 1:46 PM
Last Modified By:
Default Admin Account
Advanced...
OK
Cancel
Apply


QA.Server.Plugin
General
QA.Server.Plugin
Publisher
SoftPro
Plug-in Components
Type
Package
Server
ServerPackage.MyPackage
OK
Advanced...
OK
Cancel
Apply

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

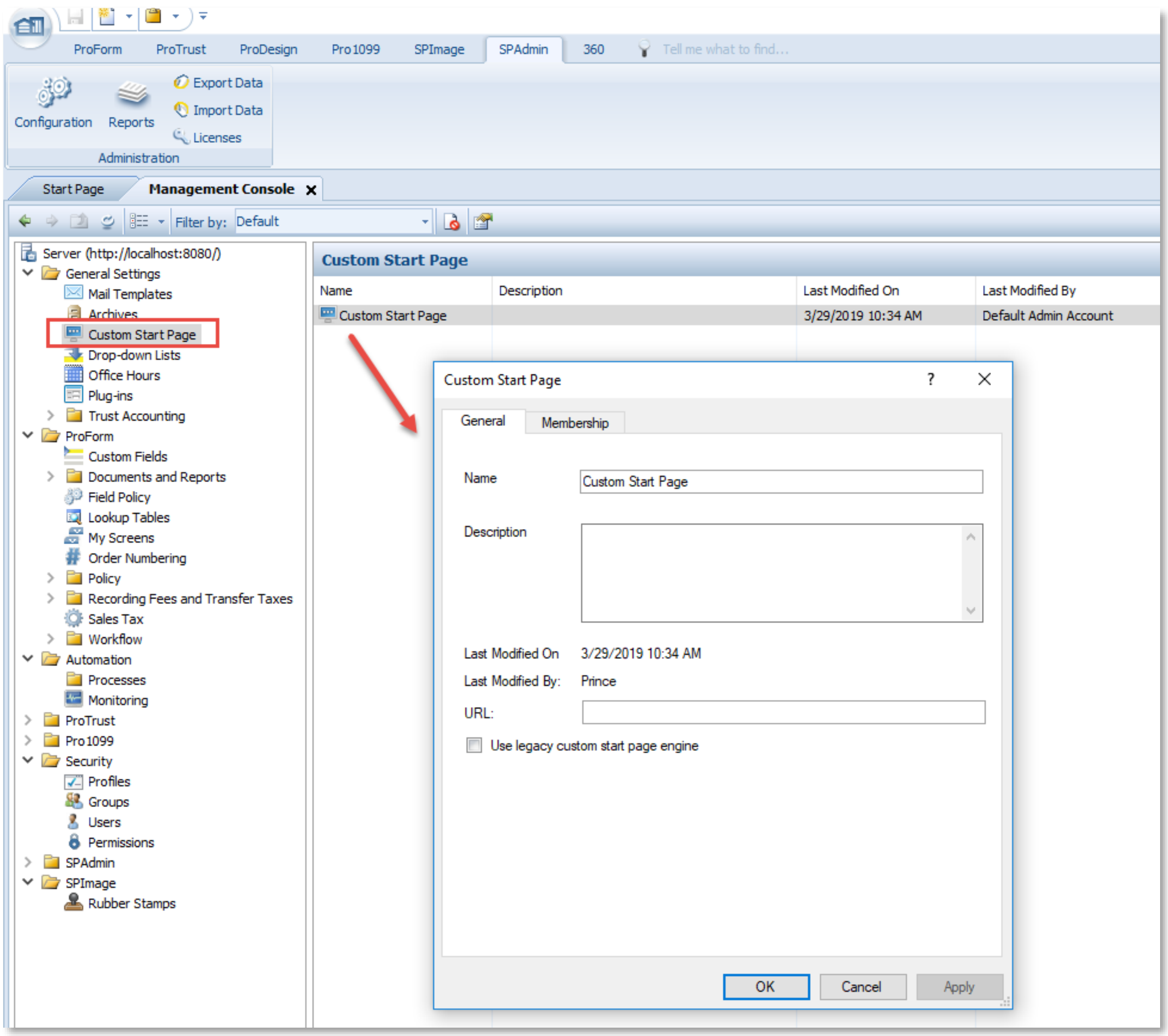




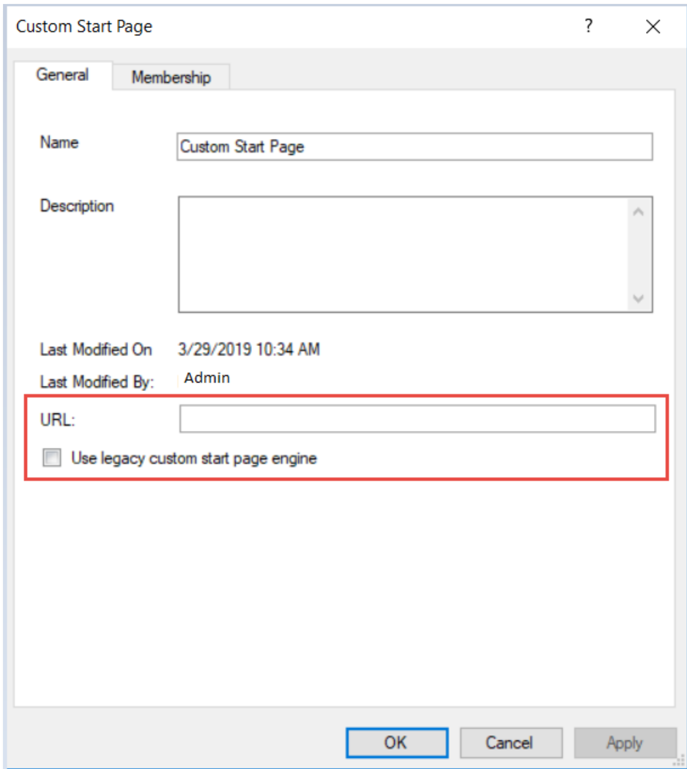
Custom Start Page Manager

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.

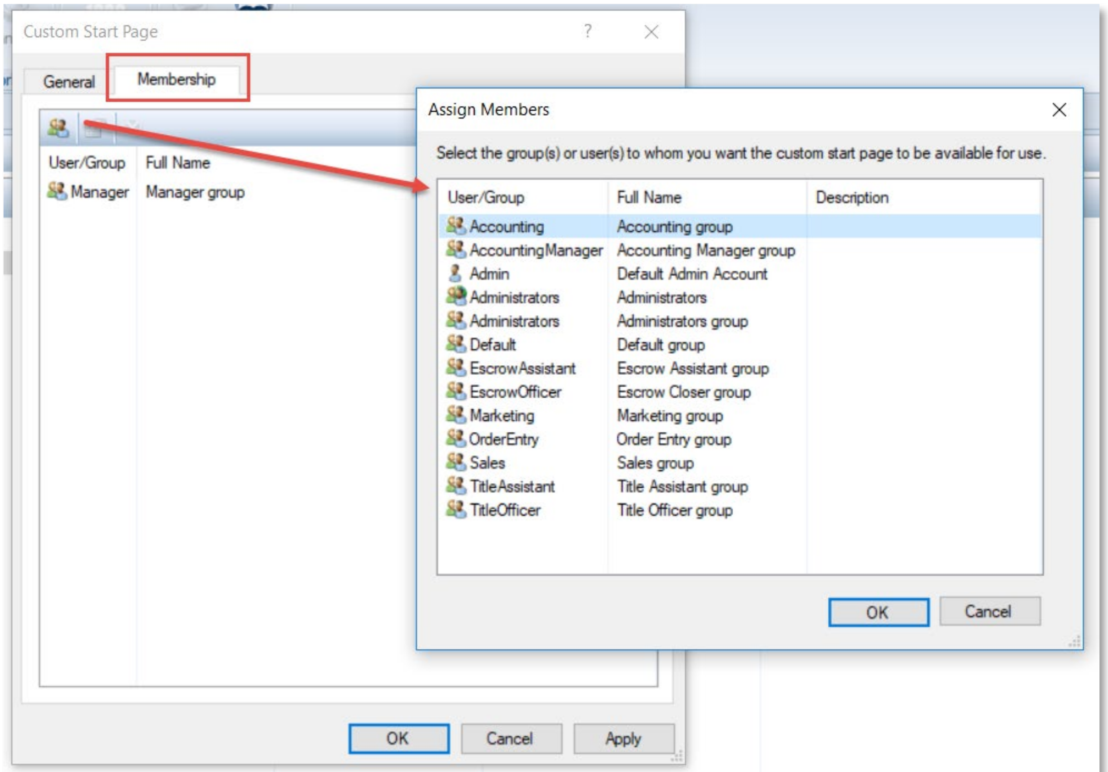
The new Custom Start Page Manager is located here:



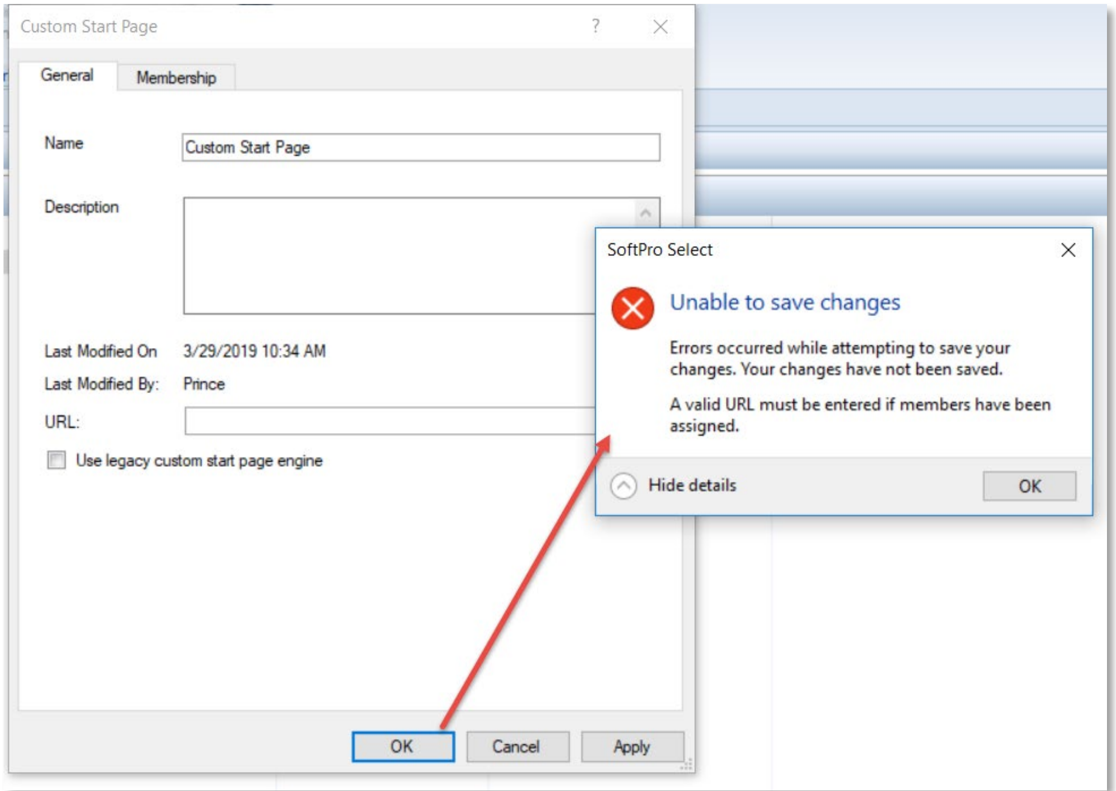
- When a different start page should display, the Admin should enter a URL for that page. This will replace the entire start page. The new start page engine is supported by a chromium browser. If the legacy custom start page engine should be used, select the **Use legacy custom start page engine** checkbox.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



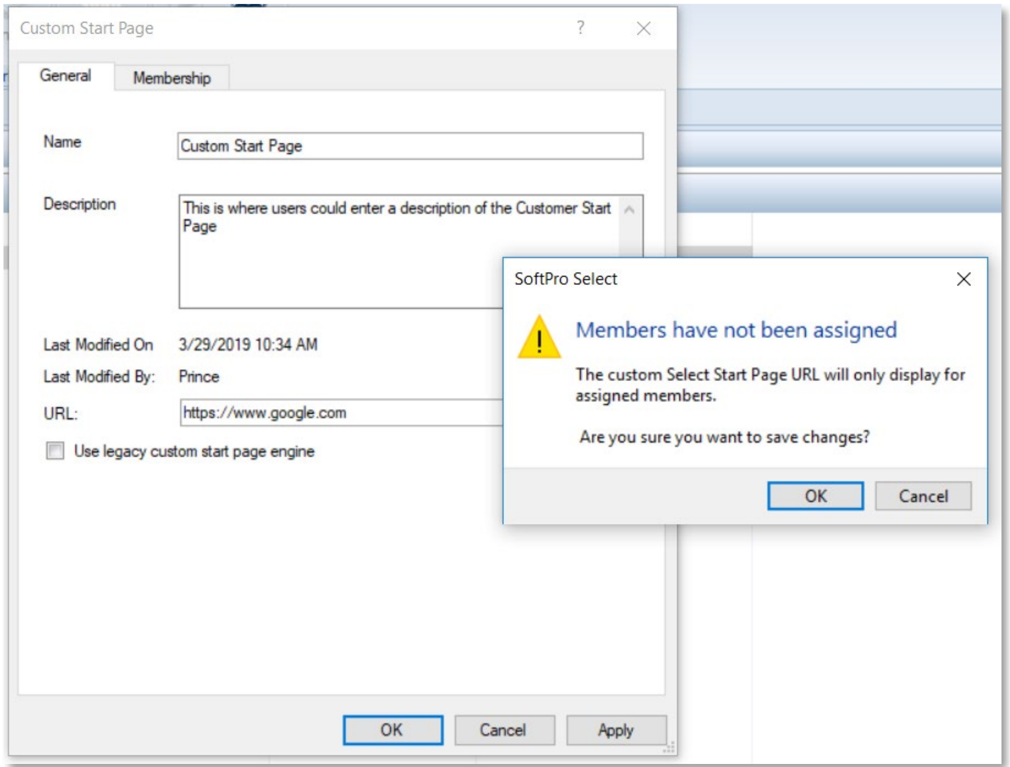
- When a custom URL is entered, only users/groups that have been assigned on the Membership tab will see the custom start page.



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

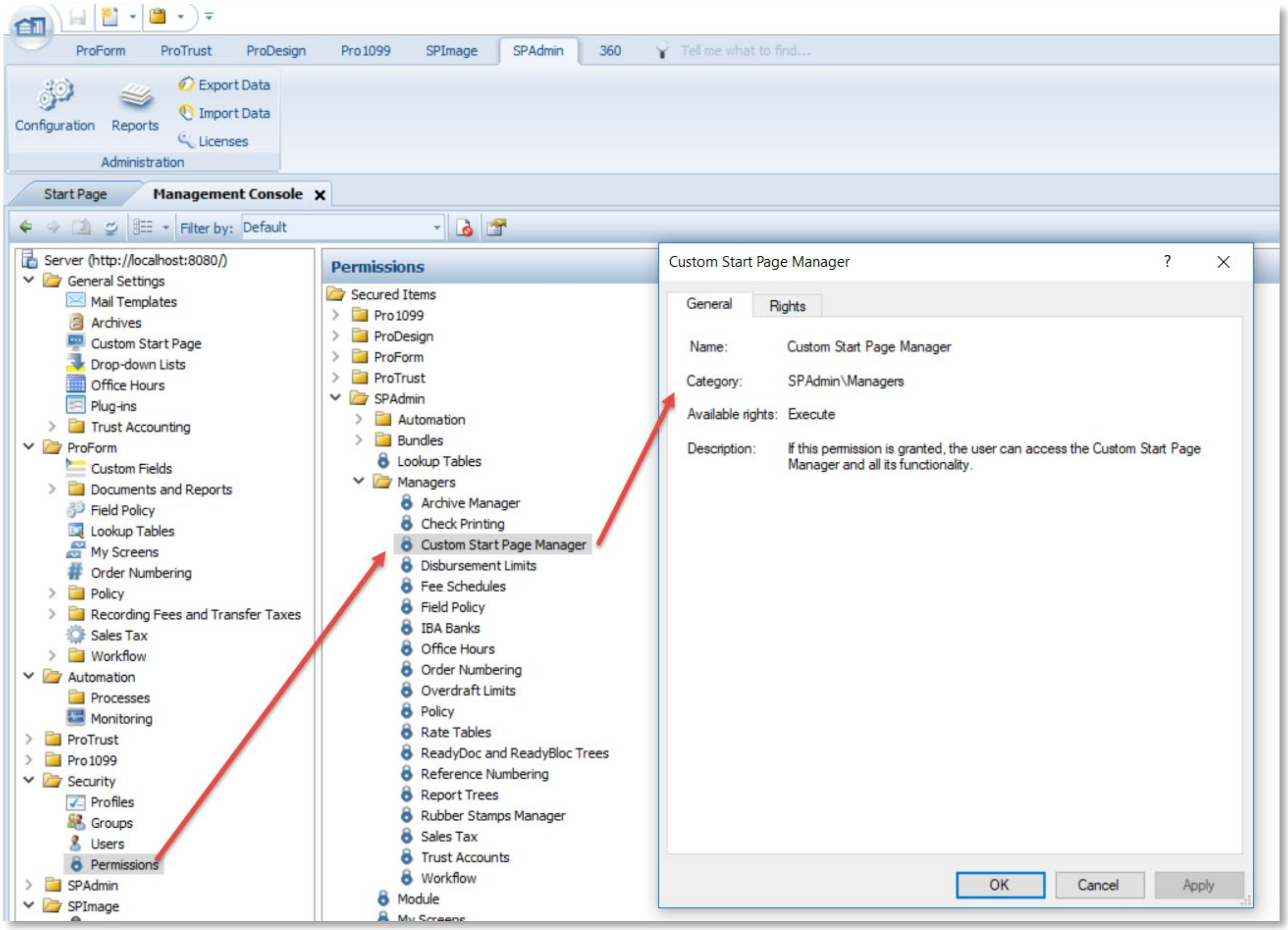


- If a URL is entered but no members have been assigned, the user will see the following warning. The information could still be saved, however the custom start page will not display until members are assigned. Once members are assigned, only the members assigned will see the custom start page. All other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



4.6.1 (6/24/19)

ProForm

Order

- After an upgrade to Select 4.6.0 from version 4.3.15.1, some users received error messages and were unable to open orders; *resolved*. 13756
- The column headings were cutting off title headings on multi-line grids; *resolved*. 14209

Documents & Attachments

- Some users were experiencing slowness during attachment-based operations; *resolved*. 14602

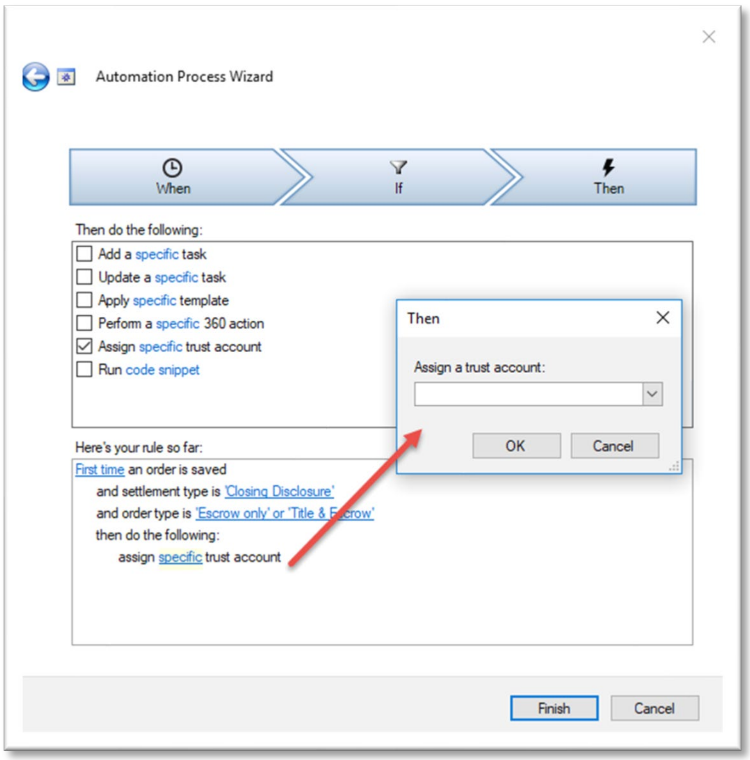
Work Automation

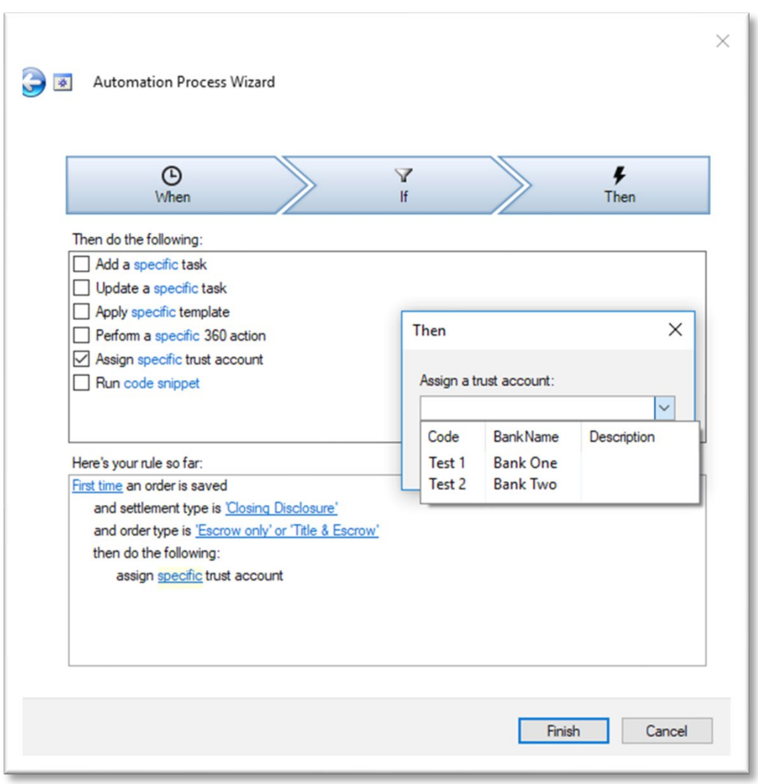
New enhancements have been added to the Automation features:

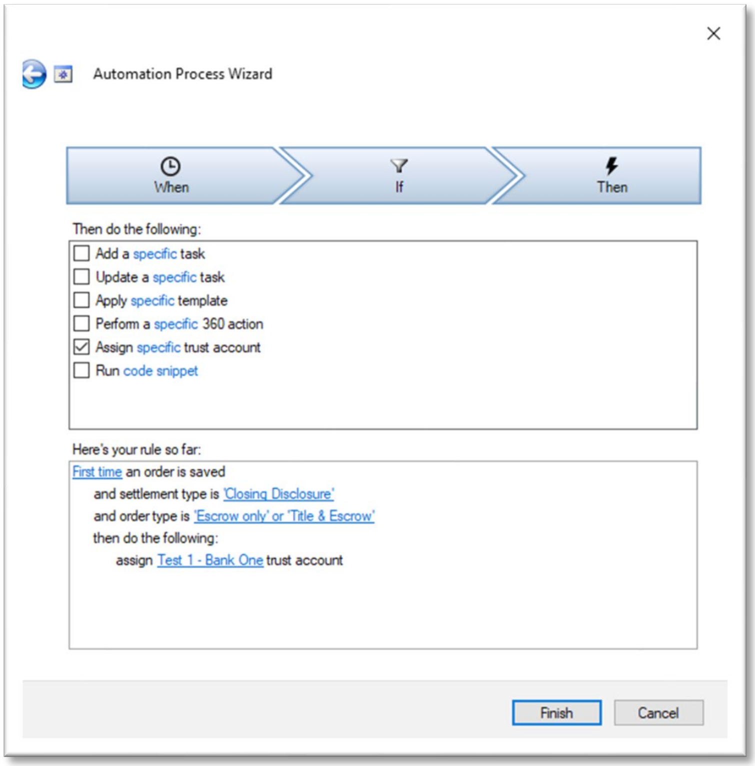
- You can now assign a specific trust account to an order.
- You can choose to send a notification email upon a process failure.

Assign a Specific Trust Account

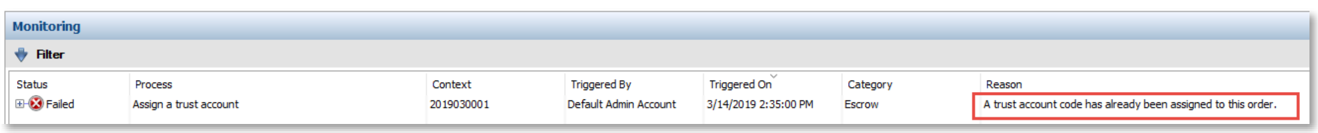
- You can now select to assign a specific trust account to an order with a new action available in the Automation wizard. 429728
- Click on the ***specific*** link to open a pop-up window to select the trust account.
- When the trigger and conditions are met, the specific trust account will be assigned.


Automation Process Wizard
When
If
Then
Then do the following:
Add a specific task
Update a specific task
Apply specific template
Perform a specific 360 action
Assign specific trust account
Run code snippet
Then
Assign a trust account:
OK
Cancel
Here's your rule so far:
First time an order is saved
and settlement type is 'Closing Disclosure'
then do the following:
assign specific trust account
Finish
Cancel


Automation Process Wizard
When
If
Then
Then do the following:
Add a specific task
Update a specific task
Apply specific template
Perform a specific 360 action
Assign specific trust account
Run code snippet
Then
Assign a trust account:
Code
BankName
Description
Test 1
Bank One
Test 2
Bank Two
Here's your rule so far:
First time an order is saved
and settlement type is 'Closing Disclosure'
and order type is 'Escrow only' or 'Title & Escrow'
then do the following:
assign specific trust account
Finish
Cancel



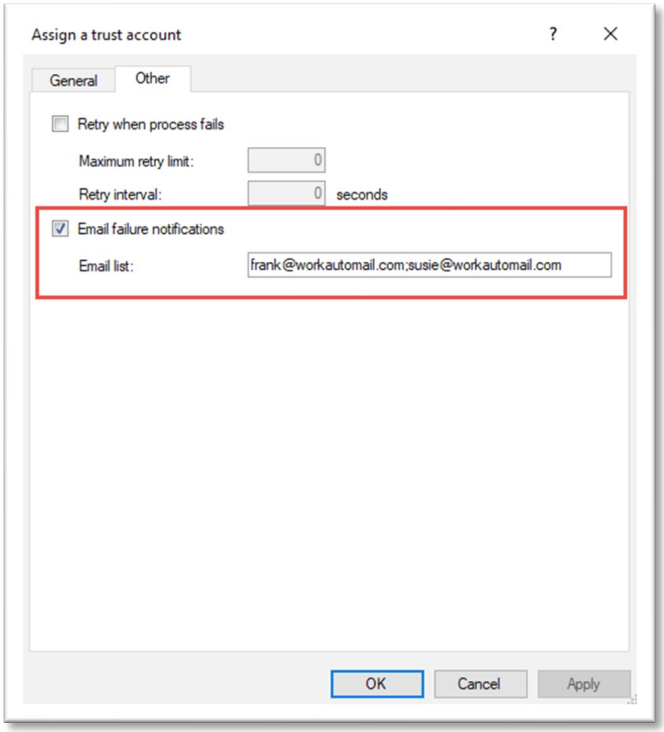
- If a trust account already exists in the order, the process will fail and the error message will indicate the reason: "A trust account has already been assigned to this order."

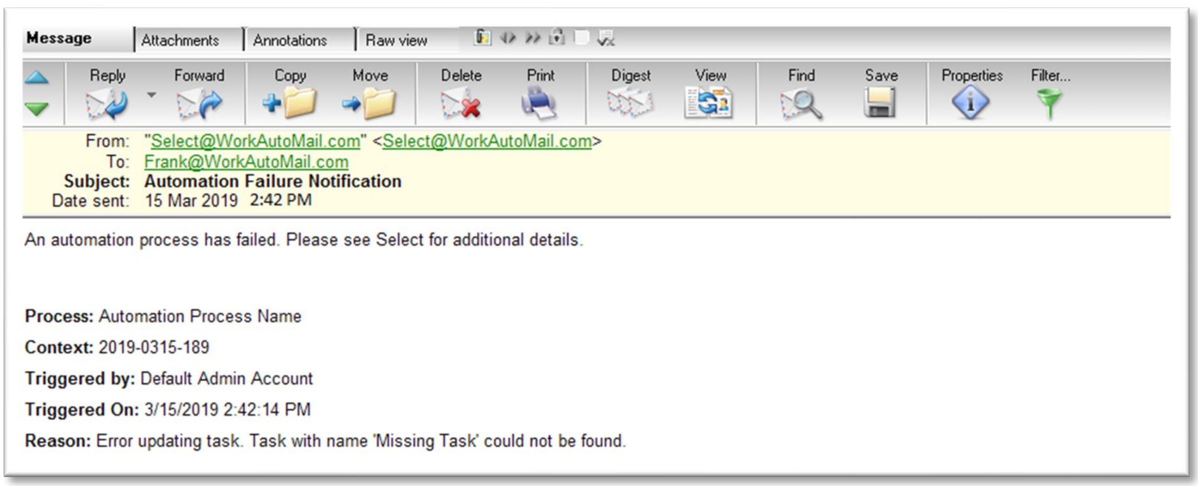


Email Notification when an Automation Process Fails

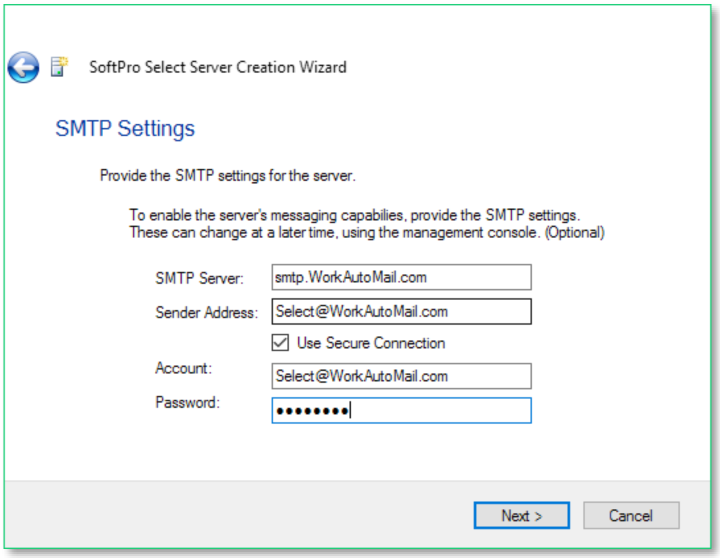
You now have the ability to set an option on the automation wizard to send an email when an automation process fails.

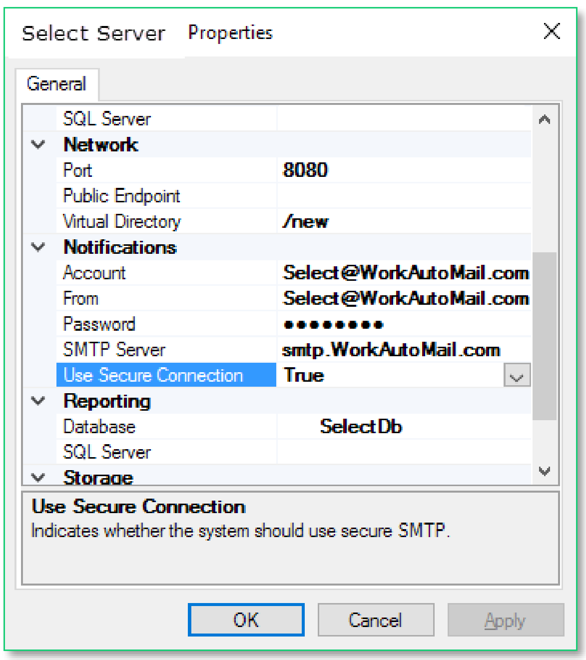
- On the Properties dialog > Other tab, an Admin can set the option to send an email notification when the process fails.
- Check the **Email failure notifications** checkbox to enable the **Email list** field.
- Enter one or more email addresses.
- Multiple email addresses should be separated by a semi-colon with no spaces between the semi-colon and email address, as shown below.





- Email notifications will need STMP settings configured for this feature to work. This can be configured during install or in the Select Server Properties dialog.


SoftPro Select Server Creation Wizard
SMTP Settings
Provide the SMTP settings for the server.
To enable the server's messaging capabilies, provide the SMTP settings.
These can change at a later time, using the management console. (Optional)
SMTP Server:
smtp.WorkAutoMail.com
Sender Address:
Select@WorkAutoMail.com
Use Secure Connection
Account:
Select@WorkAutoMail.com
Password:
Next >
Cancel


Select Server Properties
General
SQL Server
Network
Port
8080
Public Endpoint
Virtual Directory
/new
Notifications
Account
Select@WorkAutoMail.com
From
Select@WorkAutoMail.com
Password
SMTP Server
smtp.WorkAutoMail.com
Use Secure Connection
True
Reporting
Database
SelectDb
SQL Server
Storage
Use Secure Connection
Indicates whether the system should use secure SMTP.
OK
Cancel
Apply

Pro1099

- When upgrading to Select 4.6.0 from version 4.3.15.1, the 1099 Reports were missing; *resolved*. *13738*

SPAdmin

- When attempting to close a premium or discount rate table dialog or fee schedule dialog, Select would stop working; *resolved*. *13998*

Plug-ins

- **Added support for shared assemblies across Shell packages in the same plug-in.**

  There was a need to consume implementation of a service interface that is defined in a shared assembly referenced by multiple package project. The plugin infrastructure was changed to support this requirement.

- **Removed the "News Feed Synchronization" job and relevant artifacts from the system.**

  Removed the periodic server job that downloads news feed data from http://www.softprocorp.com/app/spnet/v4.6/news.xml and puts it into a database table.

  The news section on the new dashboard/start page points to this website: http://selectstartpage.softprocorp.com and no longer reads from the new feed database table.

  If 3rd parties have a news section widget on their custom start page that point to the old site, they have the option of writing a custom job handler through a Server plug-in and can code it to pull news data from any source.

4.6.2 (8/14/19)

- Some users in a large environment who upgraded from certain 4.3 versions to 4.6.1, experienced system deadlocks when querying to update or remove a conversation; *resolved*. *16578*

4.6.3 (9/20/19)

ProForm

Order

General

- The Property screen was not loading in upgraded orders created with Select version 4.5.0; *resolved*.
  19035

SPAdmin

Automation

- New 360 Automation processes were not being activated, resulting in an error message; *resolved*.
  19696

4.6.4 (10/11/19)

This was an internal release only.

- An error was occurring upon upgrading to version 4.6.1 and when the installation package contained multiple plug-ins; *resolved*. *14592*

4.6.5 (12/16/19)

ProForm

Order

- The Order Lock Status field remained enabled when the edit and access permissions were set to *deny*; *resolved*. 11835
- A POC debit entered in the 500 section was reducing the "Total cash to sellers" total on the Sellers Proceeds & 1099-S screen. If any proceeds were diverted to a HUD line, the POC amounts were calculated as "Cash to Seller"; *resolved*. 11796
- The Foreign country value in the drop-down was incorrectly listed as "Columbia" instead of "Colombia;" *resolved*. 11809
- The "For" column on payor grids is now enabled in most scenarios to allow you to select a single buyer or seller contact code. 10492
- Title premiums with a manually entered $0.00 can now be sent to an invoice. 11756
- CDF templates and orders where the aggregate adjustment charge line was on a line other than G.08 may not overlay properly into another order and sometimes resulted in an error; *resolved*. 10339
- When multiple users in the same order access the register and a change is made which affects the order, the refresh prompt that currently appears will refresh the register as well as the order. 23644

Title

- The "Premium to split" percentage was not calculating properly when the loan is equal to the sales price and when the loan is higher than the sales price; *resolved*. 13986
- The CDF section H charge line should default to "Optional" only when the fee is a borrower paid owner's policy; *resolved*. 11726

Documents and Reports

- Changes to Page 2 HUD Loan Charges 801 and 802 were not appearing on Documents; *resolved*. 482989
- The ALTA Settlement Statement should not display Seller information for 2nd and subsequent loans on purchase transaction types; *resolved*. 505073
- Buyer and Seller CDF was not pulling in the Deed and Mortgage recording description for Select versions 4.3.14.1 and 4.3.15.1; *resolved*. 518758
- When printing individual pages of the Seller CDF, an extra page was printing; *resolved*. 531583
- Tax forms 4506 and 4506T were updated to match the new March 2019 published version. 532016

- The substring calculation for document initials was not rendering correctly for some user names in ReadyDocs; *resolved*. *11836*
- Added a new SPAdmin Report for Redirected Documents/ReadyBlocs. *537900*

Redirected Documents/ReadyBlocs

Document	Title	PC	Redirected to Document	Redirected to Title	Redirected to PC
Document Type: ReadyBloc					
H_CSS_HeaderBlankForCustom	H_CSS_HeaderBlankForCustom		H_CSS_HeaderBlankForCustomTEST##	H_CSS_HeaderBlankForCustomTEST	{{Order.CSSs}}
Document Type: ReadyDoc					
DOC_SSCORPD0269	Prelim-Commitment Product Enclosure Letter (Escrow)	{{Order.Contact}}	DOC_105064_pe1099Certification	1099 CERTIFICATION	{{Order.Seller}}

- A new SPAdmin Report is available that shows all documents or reports that are pinned in SPAdmin. *537901*

User Pinned Documents

Document	Title	PC	Pinned Version	Current Version
Document Type: ProForm Report				
DOC_150064_pctEscrowOrderLogReportCorp	Escrow Order Log Report		1	1
Document Type: ReadyDoc				
DOC_150064_crt_Deed_LeaseholdAssignment	Deed (Leasehold Assignment)	{{Order.Deed}}	1	1
DOC_SPUNR_Invoice	Invoice	{{Order.Invoice}}	1	3

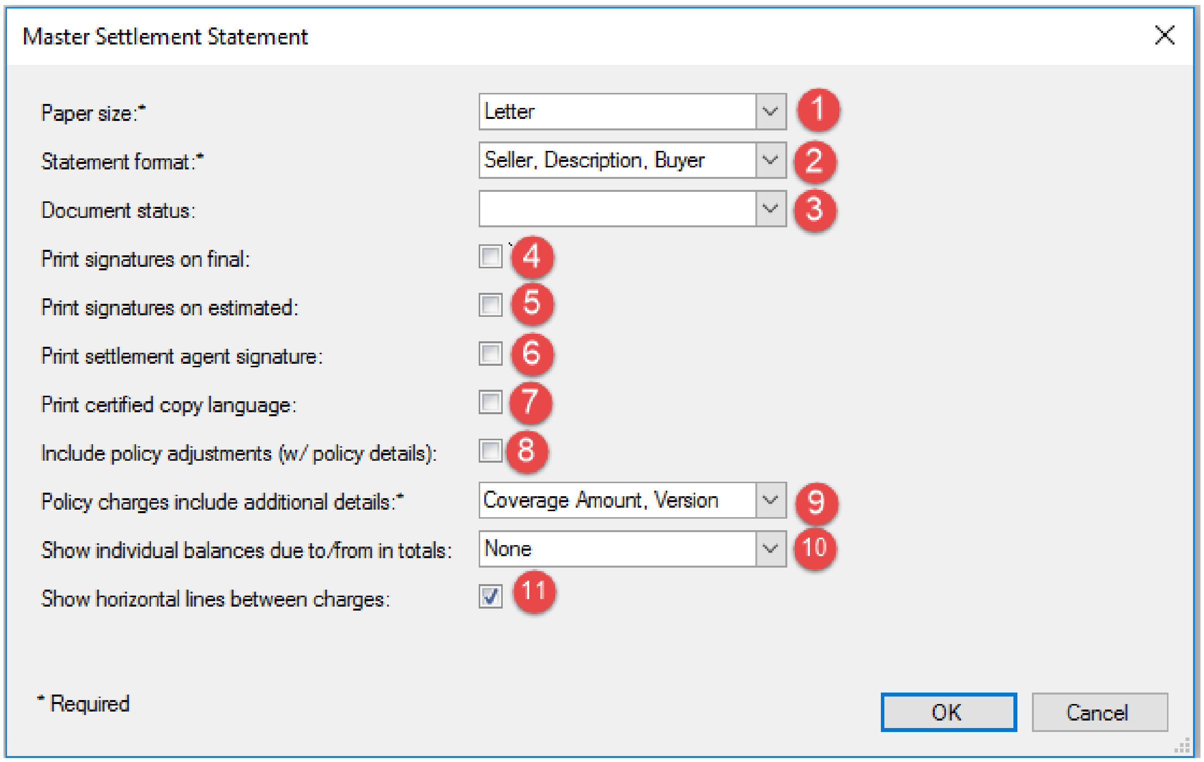
- The ALTA Settlement Statement ReadyDoc reports have been converted to an HTML version. *547677*
- The Buyer and Sellers names on the ALTA Settlement Statement will now pull from the Name Long field so that the entire name will print on the document. *306019*
- The option to print the lender address in the header was added to the ReadyDocs – ALTA Settlement Statements. *328046*
- The 1986 letter-sized HUD was cutting off the right side of Pages 2 and 3 in preview mode and when printed; *resolved*. *360139*
- The HUD-1(86) Attachment page signatures and text on the right side of the document were being cut off; *resolved*. *544889*
- A new feature is available for the Single Ledger Balance, to have a Running Balance by Trust Accounting Date. *552884*
- The "? Questions" section was added as an option to print on the CDF Seller's Statement. *556145*

SoftPro Commercial Settlement Statements

The commercial settlement statements have been replaced with HTML versions. The updated tree structure and details of the new enhancements are below.

Report Parameters

The report parameters have been updated to include additional enhancements. Parameter answers will now be saved to the order and become the defaulted value the next time the document is rendered.



1. Paper size: Users can print the statement using Letter or Legal size
2. Statement format: Existing formatting options and new options are now available
    a. Seller, Description Buyer
    b. Description, Buyer, Seller
    c. Description, Buyer, Seller (single column)
    d. Buyer, Seller separate sections
    e. Description, Buyer, Seller (credits/debits)
3. Document status: Existing status options Amended, Amended Estimated, Amended Final, Estimated, Final are available for selection
4. Print signatures on final: The option selected on the Statement Signatures & Footer screen will default here, and these parameters will be saved back to the field on the Statement Signatures & Footer screen.

5. Print signatures on estimated: The option selected on the Statement Signatures & Footer screen will default here. These parameters save back to the field on the Statement Signatures & Footer screen.
6. Print settlement agent signature: The option selected on the Statement Signatures & Footer screen will default here. These parameters save back to the field on the Statement Signatures & Footer screen.
7. Print certified copy language: Check this option to print certified copy language under the statement charges

Recording Charges		
Recording Fees to County Government	500.00	
Miscellaneous Charges		
fee to Best Ever Title Insurance Company	30,000.00	
Subtotals	**68,817.69**	**4,220,400.00**
Balance Due TO Seller	**4,151,582.31**	
Totals	**4,220,400.00**	**4,220,400.00**

THIS IS A CERTIFIED COPY OF THE ORIGINAL DOCUMENT(S) BY
BEST EVER TITLE INSURANCE COMPANY

Best Ever Title Insurance Company, Settlement Agent

8. Include policy adjustments (w/ policy details): Select this option to include the prior policy adjustments.
9. Policy charges include additional details: Select none or one of the following options if you want specific policy details to be included:
    a. Coverage Amount, Version
    b. Coverage Amount, Premium, Version
    c. Underwriter, Coverage Amount, Version
    d. Underwriter, Coverage Amount, Premium, Version
    e. Underwriter, Coverage Amount, Premium
10. Show individual balances due to/from in totals: Select Buyer Only, Seller Only, or Buyer and Seller if you want to see the individual totals under Subtotals.

58,281.69	**4,220,400.00**	**Subtotals**	**4,246,124.80**	**1,651,581.69**
		Balance Due FROM Buyer		**2,594,543.11**
		Balance Due FROM B - 1,297,271.55		
		Balance Due FROM B2 - 1,297,271.56		
4,162,118.31		**Balance Due TO Seller**		
		Balance Due TO S - 2,081,059.15		
		Balance Due TO S2 - 2,081,059.16		
4,220,400.00	**4,220,400.00**	**Totals**	**4,246,124.80**	**4,246,124.80**

11. Show horizontal lines between charges: Select this option if you want to see horizontal lines in the statement charges section. *512007*

Buyer: Brown & Brown, LLC

Bernard Brown and Betty Brown

Seller: SoftPro Corporation

Quality Exchange Services, as Qualified Intermediary for Walton Investment Group

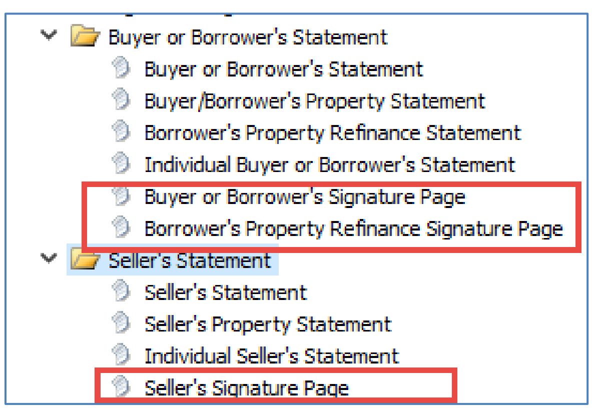
Lender: ABC Lender

Property: 124 Western Boulevard
Raleigh, NC 27609

126 Western Boulevard
Raleigh, NC 27609

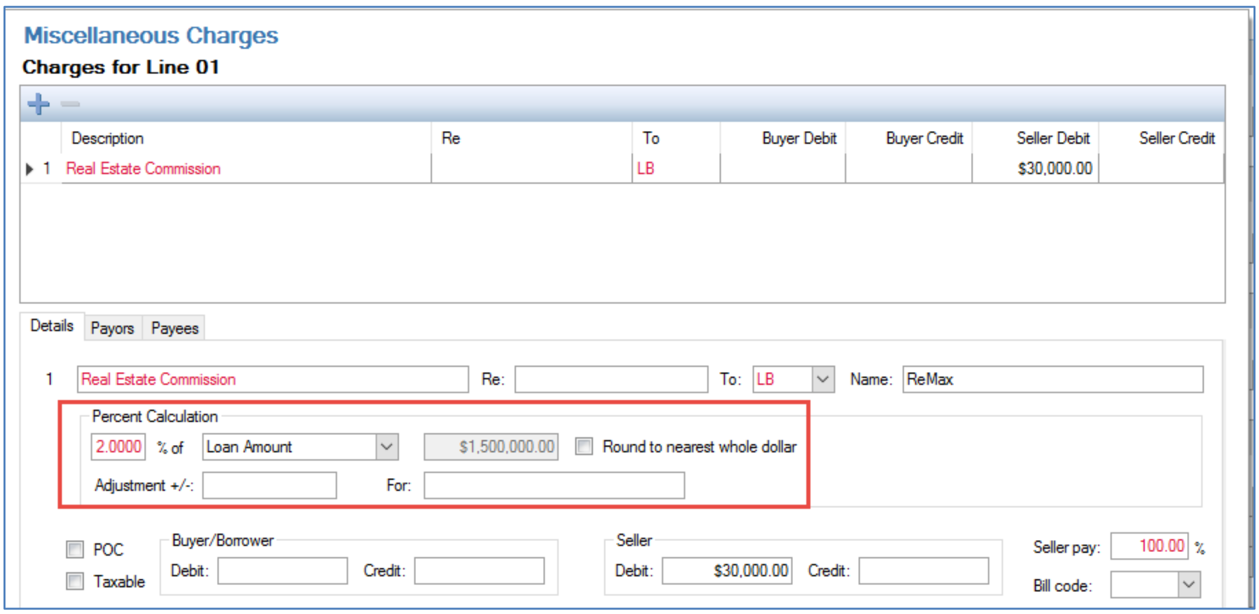
Seller			Buyer	
Debit	Credit		Debit	Credit
		Total Consideration		
	2,220,400.00	Purchase Price - 126 Western	2,220,400.00	
	2,000,000.00	Purchase Price - 124 Western	2,000,000.00	
		Deposit or earnest money		125,000.00
		Principal Amount of New Loan		1,500,000.00
		Prorations/Adjustments		
	337.68	2018 RE Taxes	337.68	
		Title/Escrow Charges		
10,536.00		Owner's Policy		
		Owner's Endorsements	1,200.00	
1,200.00		Escrow Fee	1,200.00	
		Recording Charges		
500.00		Recording Fees to County Government		
		Transfer Taxes to County Government	15,615.00	
12,236.00	**4,220,737.68**	**Subtotals**	**4,238,752.68**	**1,625,000.00**
		Balance Due FROM Buyer		**2,613,752.68**
4,208,501.68		**Balance Due TO Seller**		
4,220,737.68	**4,220,737.68**	**Totals**	**4,238,752.68**	**4,238,752.68**

- Users now have the option to print a buyer signature only page and a seller signature only page. *459353*



- Users can now render an individual Buyer's or Seller's Statement that populates only the heading data pertaining to the individual buyer or seller. *469686*

- A Refinance version of the Settlement Statement is now available. *510582*
- Commercial Disbursement Summary has been modified to change the Settlement Agent and Settlement Date labels based on the West Coast-specific option that is in SPAdmin. When the option is checked the Settlement Agent contact type will print as the label and the Settlement Date label will show Close of Escrow. *585023*
- Commercial Statements were not printing the payee name if the charge line description was blank, *resolved*. *512018*
- An asterisk can be placed in front of a section name to suppress the section name from printing on the Commercial Statement. *50634*
- When a percent charge is used to calculate a commission amount to a listing or selling agent, the details of that percent calculation will print on the Statement.



Seller Debit	Seller Credit		Buyer Debit	Buyer Credit
		Total Consideration		
	2,220,400.00	Purchase Price - 126 Western	2,220,400.00	
	2,000,000.00	Purchase Price - 124 Western	2,000,000.00	
		Deposit or earnest money		125,000.00
		Principal Amount of New Loan		1,500,000.00
		Prorations/Adjustments		
	337.68	2018 RE Taxes	337.68	
		Title/Escrow Charges		
10,536.00		Owner's Policy		
		Owner's Endorsements	1,200.00	
1,200.00		Escrow Fee	1,200.00	
		Recording Charges		
500.00		Recording Fees to County Government		
		Transfer Taxes to County Government	15,615.00	
		Miscellaneous Charges		
30,000.00		Real Estate Commission to ReMax $1,500,000.00 @ 2.0000% = $30,000.00		
42,236.00	**4,220,737.68**	**Subtotals**	**4,238,752.68**	**1,625,000.00**
		Balance Due FROM Buyer		**2,613,752.68**
4,178,501.68		**Balance Due TO Seller**		
4,220,737.68	**4,220,737.68**	**Totals**	**4,238,752.68**	**4,238,752.68**

- Additional details will print for proration charges.

		Prorations/Adjustments		
26,581.69		County Taxes/142123 271 days @ 98.087432 per day at $35,900.00 01/01/16-09/27/16		26,581.69

- If $0.00 is entered in a charge line's amount field and the RE field contains "TBD", the "TBD" text will print in the amount column.

		Inspection Fee to Best Ever Title Insurance Company	TBD	

ProTrust

- Some versions of Select would shut down when opening a transaction deposit that was created in the ProTrust ledger; *resolved*. 12644
- Receipts were remaining in the same state after moving a receipt and selecting Reload Receipts on the Group Deposits screen; *resolved*. 11801

- When the ProTrust accounting transaction date default of "use system date and time" option was selected and the system date and time transaction occurred after the end of business day, the transaction date would be adjusted to the next day; *resolved*. 12676
- An error message appeared and prevented order save when Earnest Money deposit and Receipt were sent to the same line; *resolved*. 11797
- Modifications to Order Contact wire instructions were not always updated on the pending transaction in the Register; *resolved*. 14674

Pro1099

- Some users on versions 4.3.6 – 4.3.18 may have seen two 1099 reports appear in a tree titled, "Additional Default 1099 Reports." These reports will now be located in the Default tree after upgrading to 4.6.2. 17252
  - The 1099 reports are:
    - Missing and Orphaned Records
    - Pro1099 vs ProForm Data Variance
  - After upgrading to 4.6.2 the "Additional Default 1099 Reports" tree is disabled.
  - These reports are part of the Default 1099 reports tree.

SPAdmin

- The Active Directory Sync Mass Users Save function was experiencing slowness when running operations with large numbers of users, and error messages occurred when attempting to save; resolved. 15079
- Updates to State/Tax Stamp Managers in SPAdmin to retain the fee schedule version in the order even when a fee schedule has been modified to add or remove a state, county, or city. 22517

4.6.6 (1/23/20)

- Downloaded plugins were not visible; Select was not completely removing the previous instance of shell plugins when in debug mode; *resolved*. 18136
- Plugins were not visible or were not working properly when multiple plugins referenced a common library; *resolved*. 28739

4.6.7 (1/31/20)

- The plugin button was not visible when installing new plugins; the registry was discovered to be the root cause; *resolved*. 29986

4.6.8 (2/13/20)

- Large sized plugins on install were taking multiple minutes to complete uninstall/install process on launch of Select client; underlying performance changes were introduced to optimize download times; *resolved*. 31339

4.6.9 (12/11/20 rev 10/04/21)

ProForm

General

- Out of Memory error due to core.Conversation table failing to clear; *resolved* *56434/56459/58454*
- ~~Updated F2 keyboard shortcut behavior when used to clear a field when two users are in the same order. The action was causing other fields impacted, as well as the field being cleared, to not resole and produced conflict errors. Now any field impacted by the clearing of a field shows as disabled so the other user cannot overwrite the changes; *resolved* *37962*~~

Pro1099

2020 Filing

- Updated to include changes for tax year 2020.

4.6.10 (03/08/21 Update 06/03/21)

- Not released due to an adoption blocker.

4.6.11 (06/03/21)

ProForm

General

- Functional improvement patches.
- High CPU utilization when automatic lock and close of escrow process is running in the background; *resolved*. 25879
- Deadlock occurs during new rule generation when running client and server on same machine; *resolved*. 30621

Order

New Order

- If a profile-default template is removed when reserving order numbers, the template re-appears in the list of Orders/Templates to apply when the reserved order is created; *resolved*. 12759

Order Contacts

- Validation error occurs when adding the forwarding address to the Seller Contact; *resolved*. 13809
- Screen jumping when scrolling through Order Contacts occurs when multiple Subcontractor Contacts exist; *resolved*. 15578
- Unable to Merge error occurs when two users are in an order and both add a Buyer contact and attempt to save; *resolved*. 36541

Seller Proceeds & 1099

- Select Client crashes if in a commercial order, a User adds a property, navigates to the Seller Proceeds & 1099-S screen, clicks in the check box grid, then clicks the Back button; *resolved*. 18152

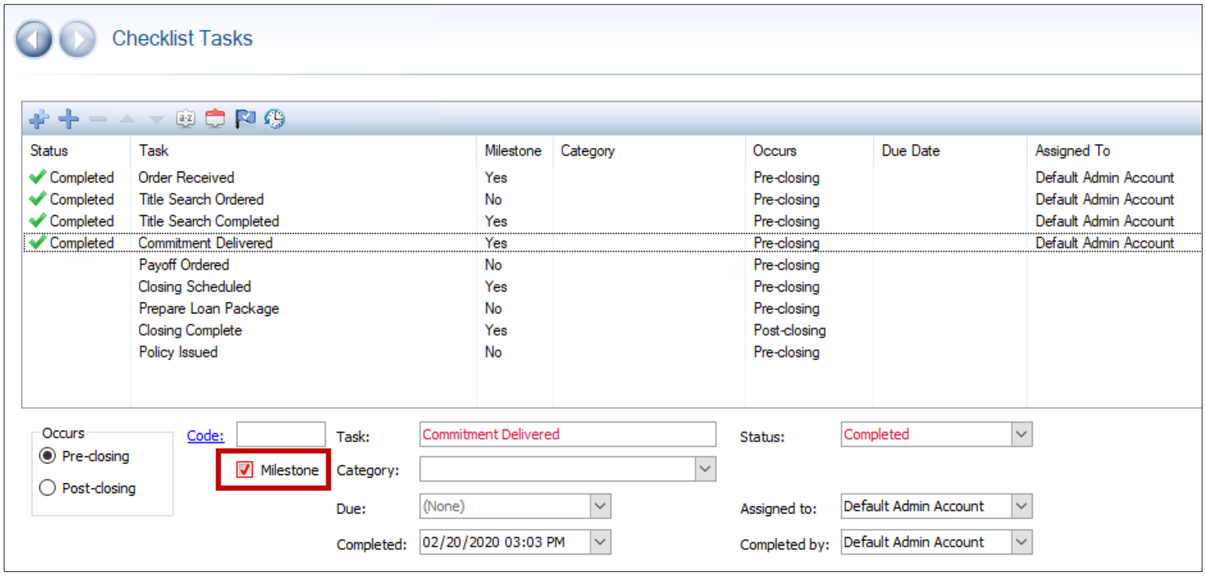
Title

- Additional policy added in Title Insurance Premiums screen when applying a template to an order that had a Policy type of Owners; *resolved*. 11590
- Loan Policy coverage amount automatically updated when the Owners Policy coverage amount is updated. This occurs where formulas are used in the Coverage amount fields; *resolved*. 37180
- Select crashes when expanding Title Owner's Policy Premium and Split section; *resolved*. 31547

Order Tasks

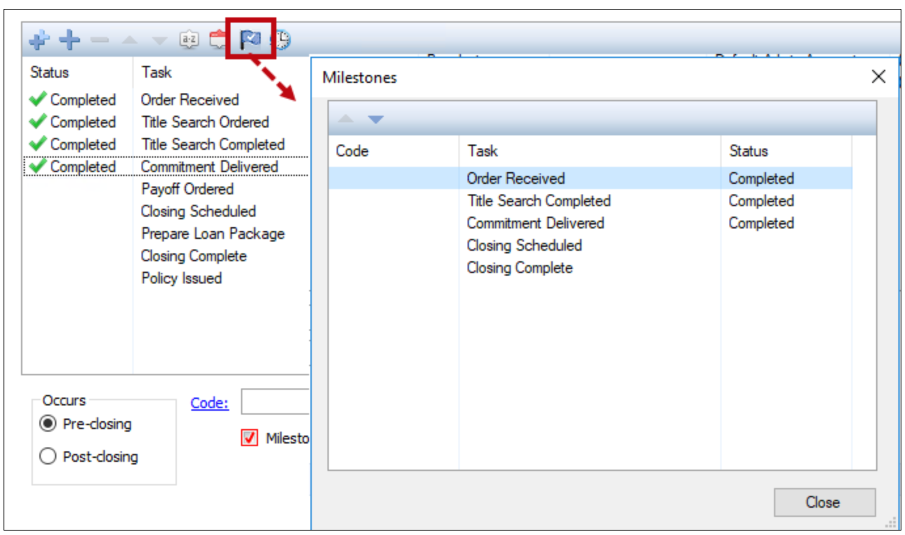
Milestones

- Checklist and Requested Tasks can now be designated as a Milestone. If you want to mark a task as a milestone for the order, check the new **Milestone** check box.



- Select the View Milestones  icon located on the Task toolbar to display the **Milestones** dialog.

- Multiple milestones can be sorted using the View Milestones dialog Up/Down arrows .



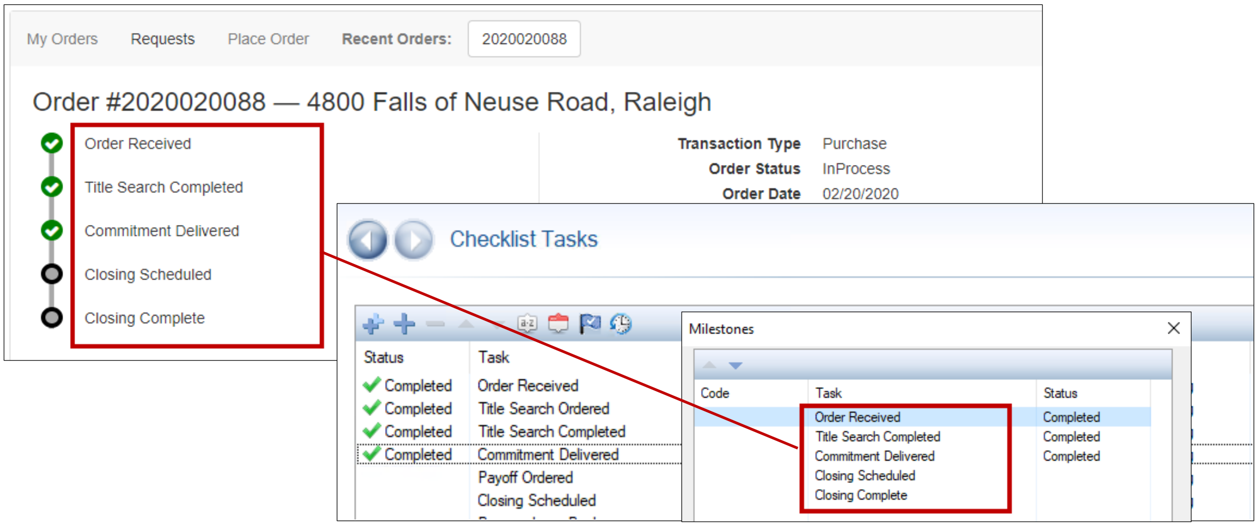
- The Order Summary and Order Summary w/ Notes ReadyDocs have been updated to allow milestones to be included.

Using Milestones with SoftPro Live

- Tasks designated as milestones can be displayed on the SoftPro Live website.
  - Any task designated as a milestone is automatically shared with all users on the order upon publishing
  - It is not necessary to permission milestones during the SoftPro Live publish as is done today

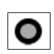
- There must be a minimum of two milestones identified in the SoftPro Select order for the milestones to appear in SoftPro Live

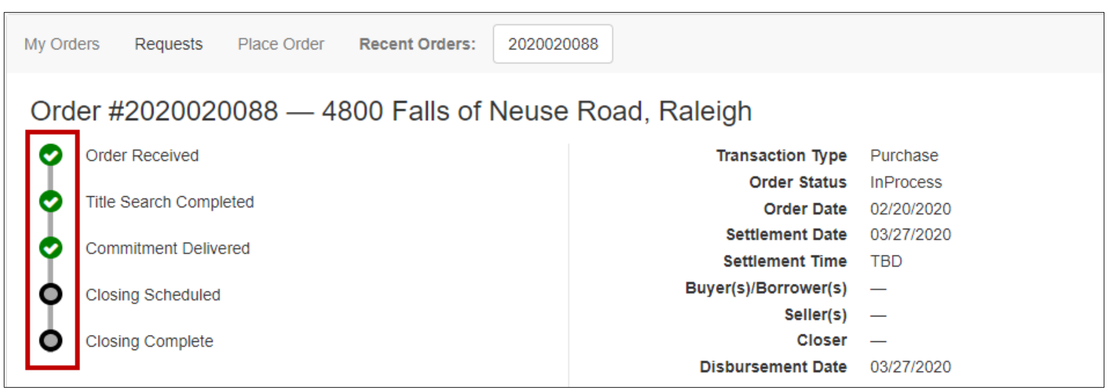
- The SoftPro Live Order Details page displays tasks designated as milestones in the sort order shown in the View Milestones dialog. A maximum of seven milestones are displayed.



Milestones icons

- Are displayed to the left of the Milestone name
- Change based on the status of the Milestone in SoftPro Select





Settlement Statement

- Sales tax rounds differently on commercial orders if sent to a separate line on the settlement statement; *resolved*. *12081*

Documents

- Document tree freezes on loading of multiple document trees; *resolved*. 30872
- Clicking a document hot spot attempts to open a third-party application instead of navigating to the field within SoftPro Select; *resolved*. 47132
- ALTA Settlement Statement (Master, Buyer, Seller)
    - The additional print parameter, Print Date & Time, added to allow date and time to appear in the document header. 30608
    - County tax escrow appears in Prorations section instead of Impounds section when overtyped on the charge line; *resolved*. 26109
    - Additional tax escrow appears in Prorations section instead of Impounds section when the fee is entered on the charge line; *resolved*. 42932/63498
    - An error is thrown when a Lender name contains an ampersand and no spaces before or after the ampersand; *resolved*. 26114
    - Document does not render when an ampersand with no spaces before or after the ampersand is entered in the Reference field; *resolved*. 42796
    - Loan amount prints twice when order is a purchase and the *Use optional Closing Disclosure forms for transactions not involving seller (Refinance)* option is checked; *resolved*. 37925
    - Loan amount fails to print when order is a refinance and the *Use optional Closing Disclosure forms for transactions not involving seller (Refinance)* option is checked; *resolved*. 43461
- Closing Disclosure Form (CDF) (all versions) – print driver issue causing longer document render times in some environments; *resolved*. 32908
- HUD Settlement Statement – “Seal” required at the end of a signature line in some environments; *resolved*. 26108
- Commercial Property Settlement Statement – charge amount displayed incorrectly when charges appear on the same line that have a combination of charges and include a credit/debit charge; *resolved*. 26134
- The following documents may fail to render if the West coast specific profile property is unchecked:
    - Order Balance Sheet (Commercial); *resolved*. 26828
    - Disbursement Summary (CDF, HUD, Commercial); *resolved*. 27081
- Disbursement Summary (CDF, HUD) – document prints Close of Escrow when West coast specific is checked in the profile properties and Settlement date when unchecked.
- Disbursement Summary (Commercial) – typo in Settlement Date label when the West coast specific option is unchecked in the profile properties; *resolved*. 27842
- Invoice format changed to HTML ReadyDoc. 40312
- Order Summary and Order Summary with Notes updates:
    - “Rush” does not appear on document; *resolved*. 42765
    - An error is thrown when an Other Contact type Description field contains an ampersand and no spaces before or after the ampersand; *resolved*. 43914

- Substitute 1099-S Form – problems rendering document; *resolved*. 53707

  Alternate versions of the Substitute 1099-S (2017 or later) and the Substitute 1099-S Form (Signatures) (201 or later) are available by manually adding these document to the ReadyDoc Tree in SPAdmin.

- Tax Form 4506 updated to 10/2020 version. 62107
- Tax Form 4506T updated to 06/2019 version. 29059/62106
- New tax forms added:
  - Settlement Agents Receipt Sellers Cert Under FIRPTA in the Tax Forms > FIRPTA folder. 31476
  - Borrower’s Consent to the Use of Tax Return Information in the Loan folder. 31480

Reports

- Crystal Reports fail to render in on-premise deployment; *resolved*. 31554
- Completed Order Tasks report
  - Parameter added to Show notes for requested order tasks. When notes are show, user’s full name is displayed and Due Date column now shows requested due date if received due date is blank. 26105
- Completed Order Tasks by Escrow Officer/Closer
  - Parameter added to Show notes for requested order tasks. When notes are shown, user’s full name is displayed and Due Date column now shows requested due date if received due date is blank. 26103
  - Label changes to show “Task due date from” and “Task due date through”. 26818
- Fees Not Disbursed report – Sort by Order Number added. 26827
- Multiple Reports
  - Records not being returned when selecting a specific value from a parameter list but being returned when leaving the same parameter value blank; *resolved*. 31333
  - Report footer incorrectly shows a profile name that includes an ampersand as “&”; *resolved*. 41029
- Orders by Contact report – added filtering by profile to the Order Contact Company Name parameter and to the Main Contact Person parameter. 26813
- Orders by Employee report
  - Corrected formatting issues
  - Added filtering by Contact Type to the Employee parameter. 26815
- Orders by Escrow Status report – performance issues; *resolved*. 26819
- Orders by Title Status report – updated to show No Title Status when a title status is not entered for an order. 26824
- Orders Received by Employee report – report now evaluates order dates for UTC offset when returning records to report. 47226
- Outstanding Policies report – box appearing in upper left corner above the header removed. 26825

- Policy Register / Liability report
    - Proposed Insured field changed to rich text field. *26107*
    - Filtering by profile added to the Underwriter parameter. *26811*
    - Property Use column to show the property use description. *43509*
- Reconcile Recording Charges report – printing error when attempting to run the report; *resolved*. *32604*
- Reserved Order Numbers report – project name does not show in report header; *resolved*. *25373*

ProTrust

Reports

- Cleared checks showing on Receipts and Disbursements (Outstanding) by Trust Account Date report when the item is posted and cleared at the same time; *resolved*. *15185*
- Anticipated Incoming Wires report
    - Commercial orders show in the No Settlement Agent group even though one is entered in the order and selected on the Statement Header screen; *resolved*. *38340*
    - Groupings added to the report. *38430*
        - Anticipated group shows entries from the Anticipated Wires screen.
        - Pending group shows orders within the settlement date range and only prints if there are anticipated wires returned to the report.
- Disbursed Transferred Funds by Transaction Date report
    - Records not included when selecting an individual trust account code from the trust account code parameter list; *resolved*. *41285*
    - Report is slow to render; *resolved*. *58492*
- Disbursed Transferred Funds – Trust Accounting Date report - report is slow to render; *resolved*. *56856*
- Single Ledger Balance (Transaction Date) – check box parameter added to allow for masking the account number. *27119*
- Single Ledger Balance (Trust Account) – check box parameter added to allow for masking the account number. *25570*
- New Reports
    - Single Ledger Balance, with Masked Account Number (by Transaction Date). *27146*
    - Single Ledger Balance, with Masked Account Number (by Trust Accounting Date). *27120*

SPImage

- Rolled back resolution for order number (bar codes) with varying character lengths not importing when scanned. Resolution adversely affected hot spotting on HTML and Crystal Reports ReadyDocs. 47132

SPAdmin

- Lookup Table Import from File utility prohibiting formulas from importing correctly when formula contains a ‘>’ or ‘<’; *resolved*. 17465

Automation

- Automation not displaying “Attach email to order” in process list; *resolved*. 45114