



# SoftPro Select 4.6.3

## (ivylane20190913r1)

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# Summary

SoftPro Select new features and enhancements are highlighted below.

## 4.6.0 (5/13/2019)

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- **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)

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- **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)

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

## 4.6.3 (9/20/2019)

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- **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.

# ProForm

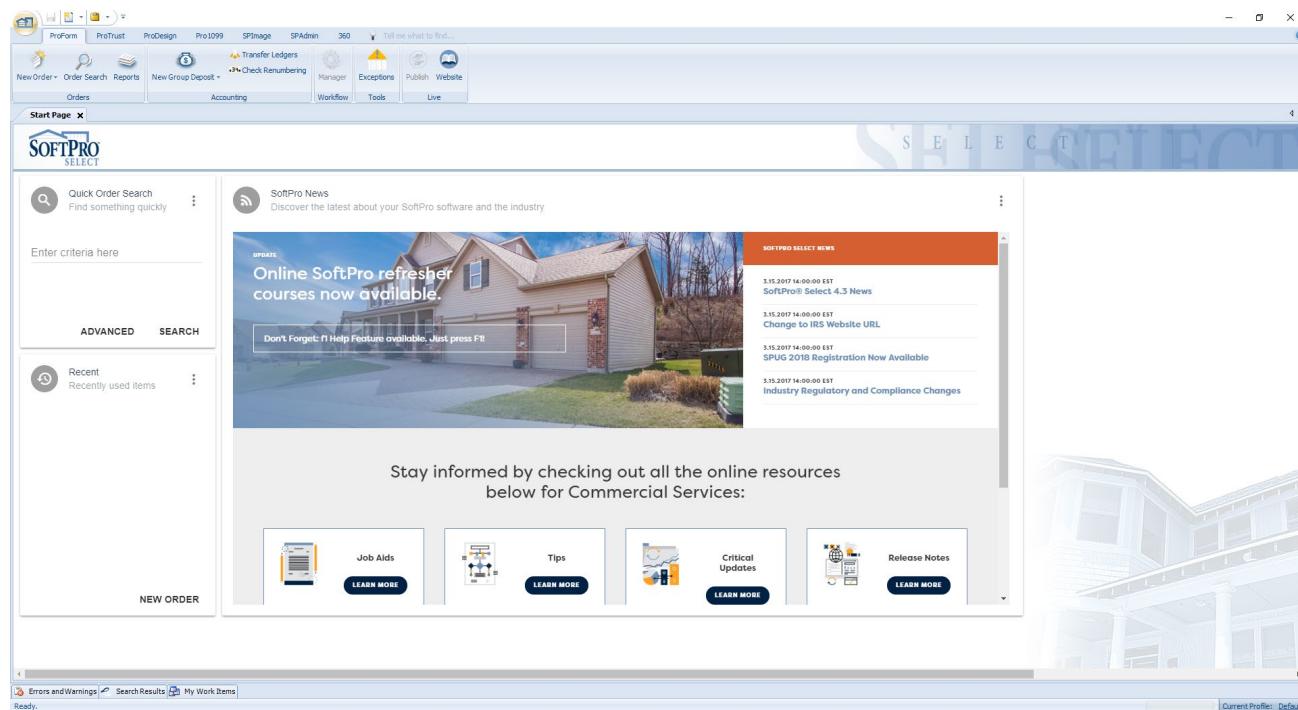
## Select Start Page

- 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.

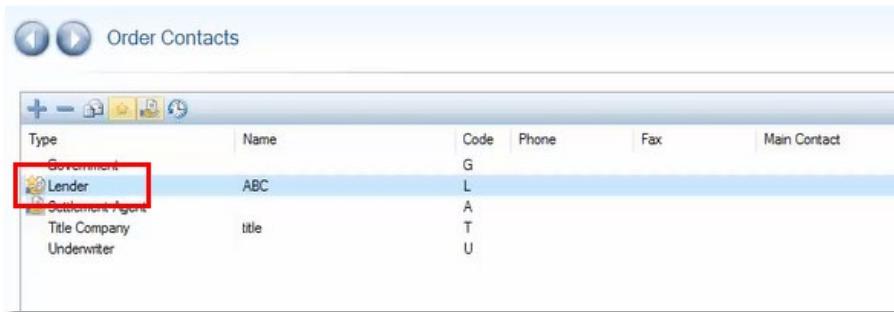


- The **Commitment Recipient** checkbox is available on all Order Contact screens.

- 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.

Type	Name	Code	Phone	Fax	Main Contact
Government		G			
Lender	ABC	L			
Settlement Agent		A			
Title Company	title	T			
Underwriter		U			

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



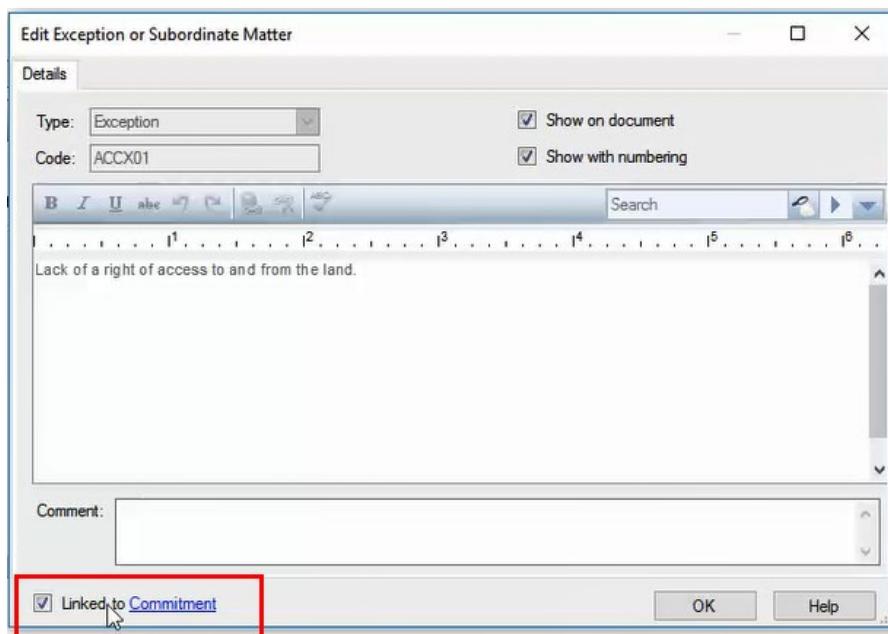
- When the lookup table for zip codes had filtering turned on, entering in zip codes and pressing Tab was not auto-populating the related fields; *resolved.* 11752
- The License ID was not defaulting for contact people when that person was added to a contact automatically via the Escrow Officer/Closer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

## Title

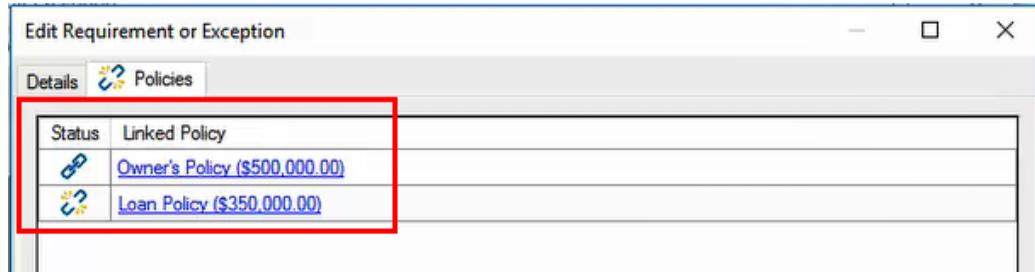
### Linking Policy and Commitment Exceptions

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

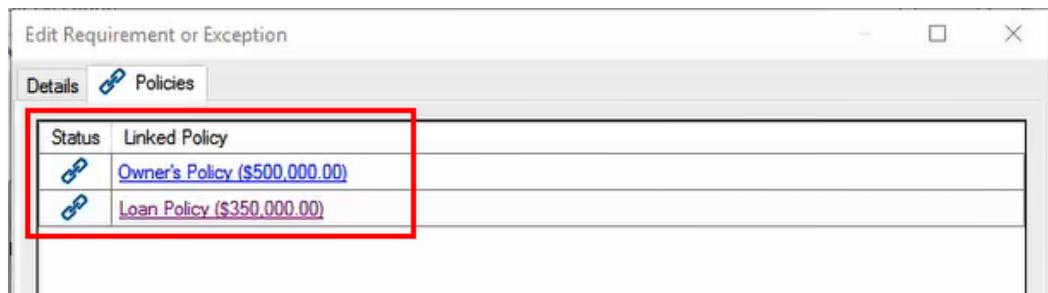
- On the Policy - Schedules B1, B2 screen, click the **Start Policy** button, then click on an Exception.
  - The Edit Exception or Subordinate Matter pop-up has a new checkbox: **Linked to Commitment.**



- 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.



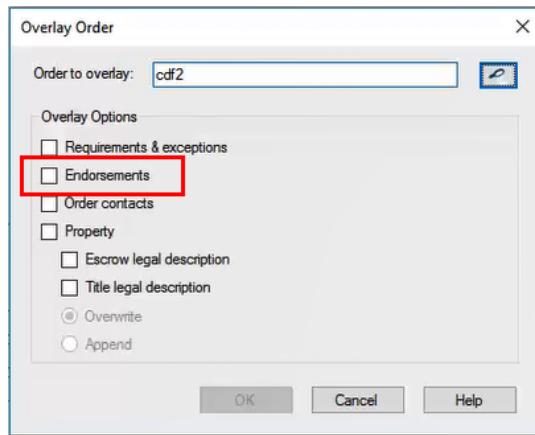
- If all of them are linked, the tab icon will show as linked.



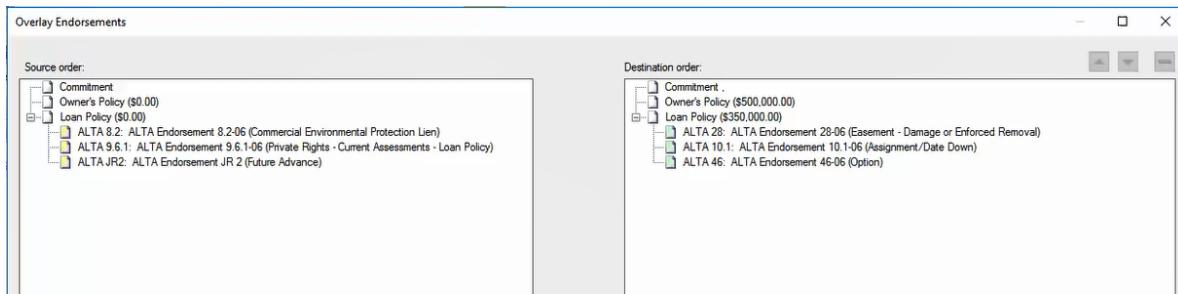
### Overlay Endorsements

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.

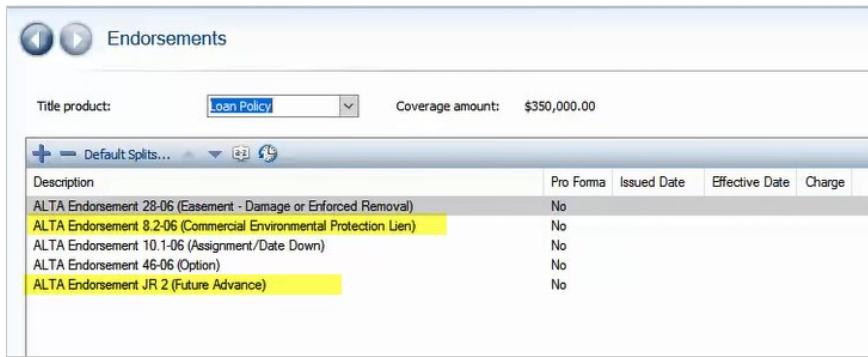


- Check the **Endorsements** box, and a new screen opens to select which endorsements to overlay into the order.
  - Source order – contains the Endorsements in the order to be overlaid into the current order.
  - Destination order – the current order that will contain the endorsements already in the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

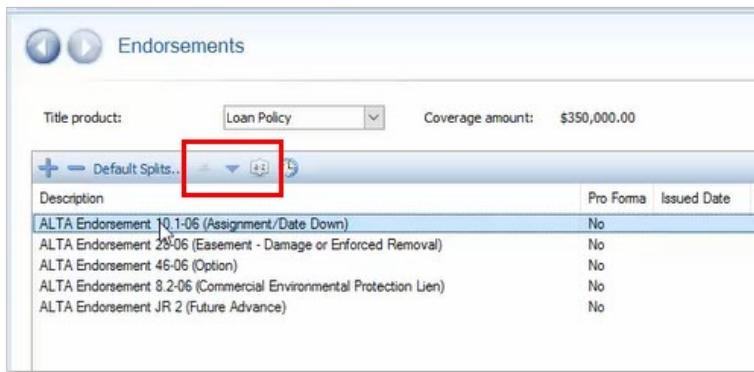


The screenshot shows the 'Endorsements' grid interface. At the top, there are buttons for 'Default Splits...', 'Up', 'Down', and 'Delete'. The title product is set to 'Loan Policy' with a coverage amount of '\$350,000.00'. The grid lists several endorsements, with the last four highlighted in yellow: 'ALTA Endorsement 28-06 (Easement - Damage or Enforced Removal)', 'ALTA Endorsement 8.2-06 (Commercial Environmental Protection Lien)', 'ALTA Endorsement 10.1-06 (Assignment/Date Down)', and 'ALTA Endorsement 46-06 (Option)'. The columns in the grid are 'Description', 'Pro Forma', 'Issued Date', 'Effective Date', and 'Charge'.

Description	Pro Forma	Issued Date	Effective Date	Charge
ALTA Endorsement 28-06 (Easement - Damage or Enforced Removal)	No			
ALTA Endorsement 8.2-06 (Commercial Environmental Protection Lien)	No			
ALTA Endorsement 10.1-06 (Assignment/Date Down)	No			
ALTA Endorsement 46-06 (Option)	No			
ALTA Endorsement JR 2 (Future Advance)	No			

### 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 screenshot shows the 'Endorsements' grid interface. A red box highlights the sorting toolbar buttons: 'Default Splits...', 'Up', 'Down', and 'Delete'. The title product is set to 'Loan Policy' with a coverage amount of '\$350,000.00'. The grid lists several endorsements. The first row, 'ALTA Endorsement 10.1-06 (Assignment/Date Down)', is highlighted in blue, indicating it is the current selection. The columns in the grid are 'Description', 'Pro Forma', 'Issued Date', and 'Effective Date'.

Description	Pro Forma	Issued Date	Effective Date
ALTA Endorsement 10.1-06 (Assignment/Date Down)	No		
ALTA Endorsement 28-06 (Easement - Damage or Enforced Removal)	No		
ALTA Endorsement 46-06 (Option)	No		
ALTA Endorsement 8.2-06 (Commercial Environmental Protection Lien)	No		
ALTA Endorsement JR 2 (Future Advance)	No		

- 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.

Interim Interest

Interim interest to be paid: At Closing

Per diem decimal digits: 2

Per diem based on: 365 days per year

Per diem from date of: Disbursement

Line: LOAN.01 [CSS](#)

Do not round per diem

04/17/2019 to 05/01/2019 = 14 days at \$131.510000 per day = \$1,841.14

- 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.

Loan Charges					\$1,841.14
Description	Re	To	Name	C/D	Buyer Debit
01 Interim Interest	04/17/19 to 05/01/19 at 131.51 per day				\$1,841.14
<Click here to add a row>					

## Documents & Attachments

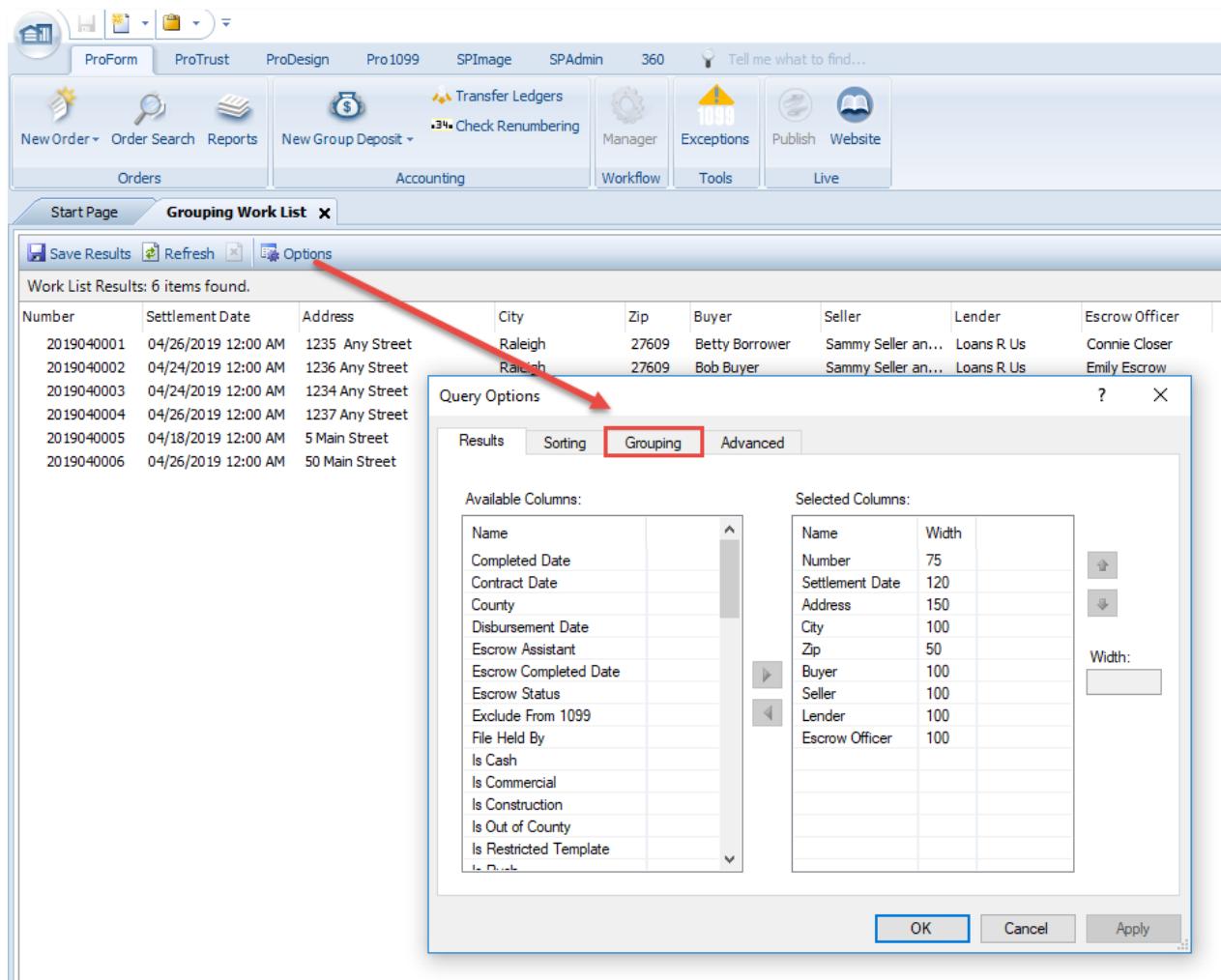
- The Drag and Drop function from the Select Attachments to the desktop was not working properly, requiring multiple attempts, and sometime incurring an error; *resolved*. [11046](#)
- Moving an attachment from one folder to another could result in duplicate copies and an error message when trying to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

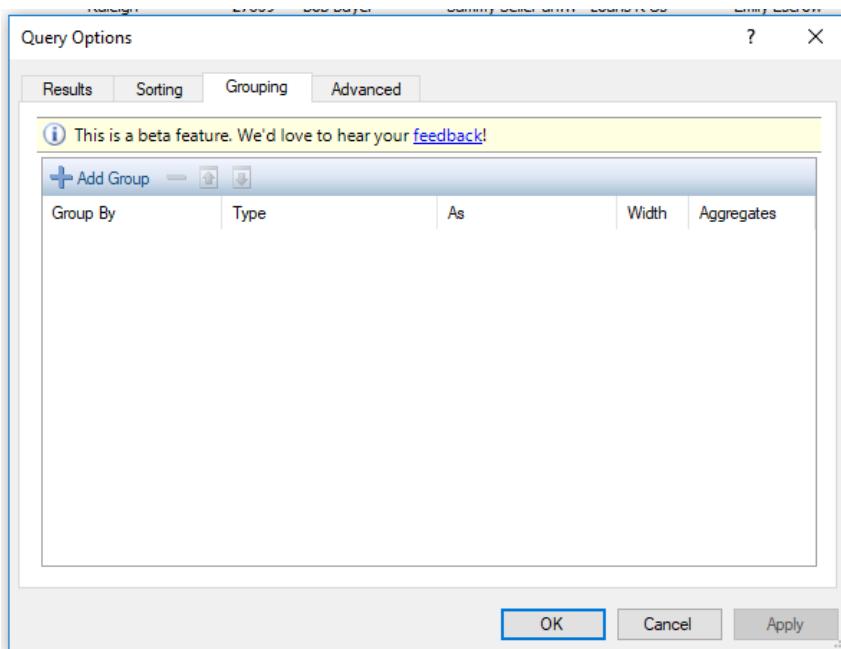
- Provides the ability to group worklist results
- Users now have the ability to provide feedback on this feature

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.

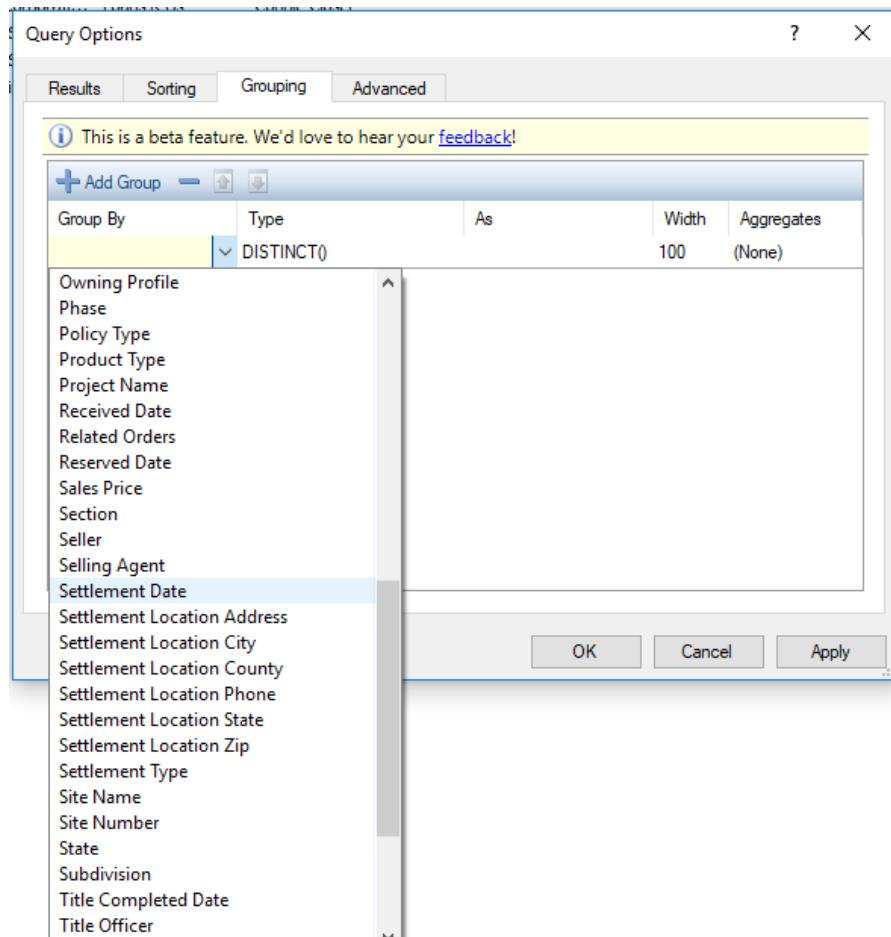
- After running a Work List query, click **Options** to see a new Grouping tab on the dialog.



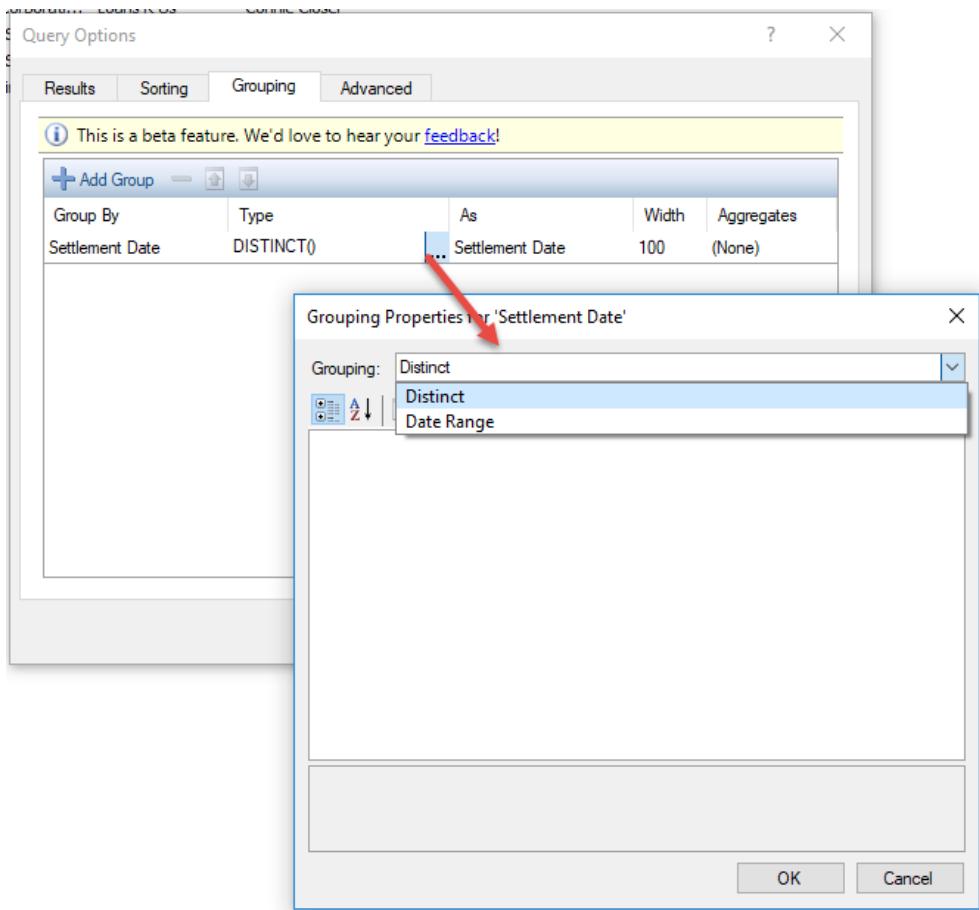
- Click the **Grouping** tab to enter new groupings.



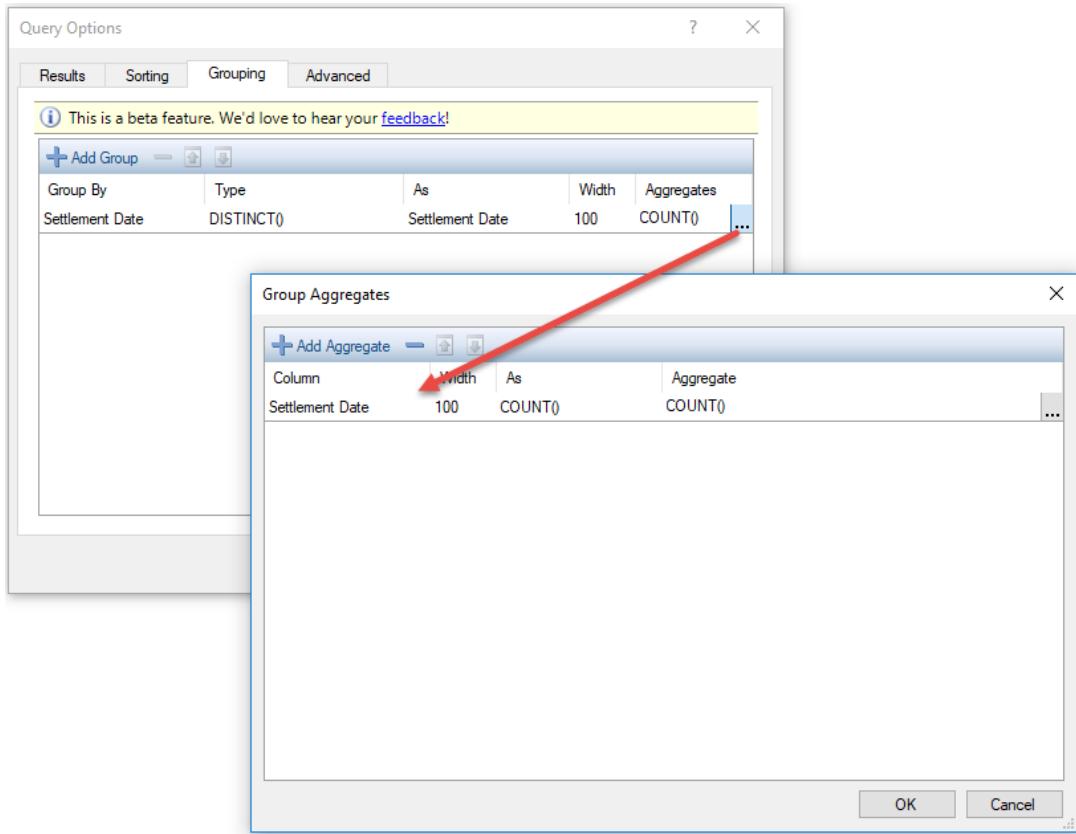
- To add a new grouping, click the **+Add Group** button.
- Select a method to group by from the Group By dropdown list. For example, to group results by Settlement Date, click **Settlement Date**.



- 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:

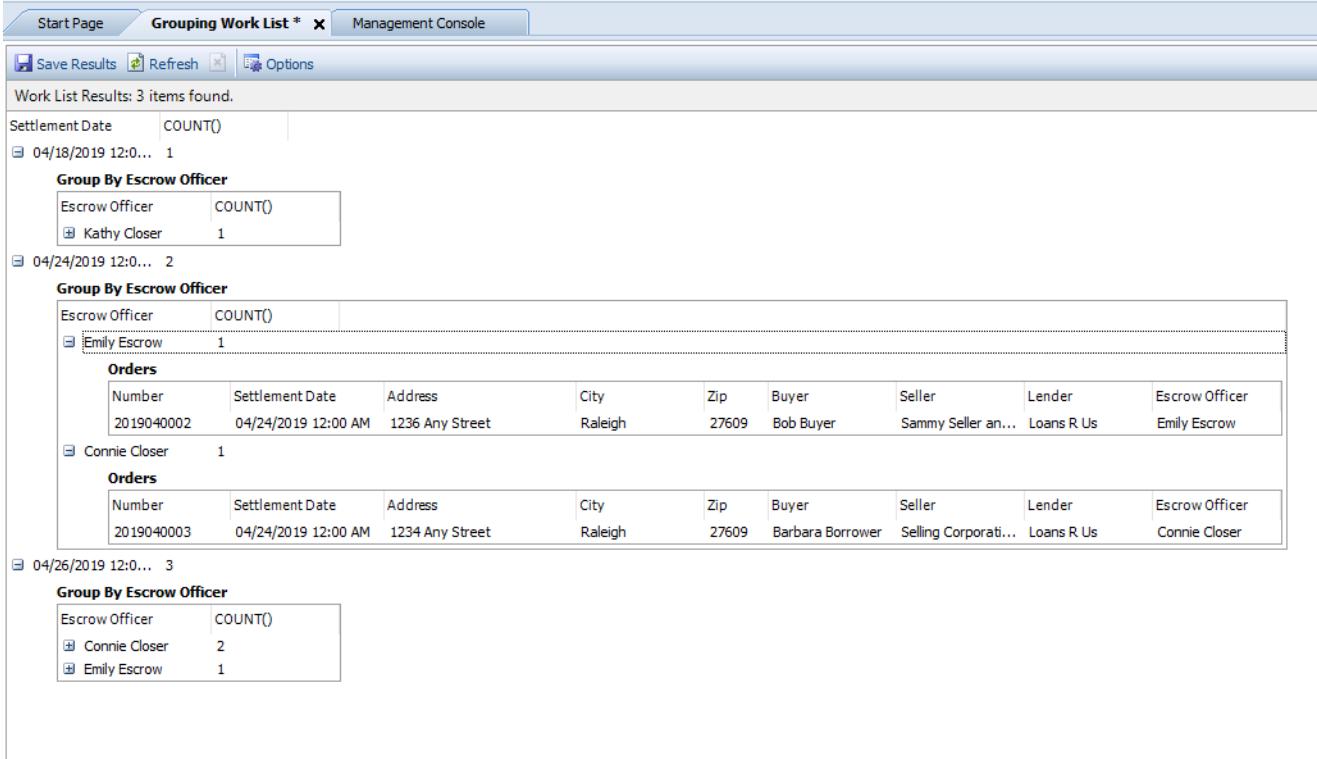
Work List Results: 3 items found.	
Settlement Date	COUNT()
04/18/2019 12:00 AM	1
04/24/2019 12:00 AM	2
04/26/2019 12:00 AM	3

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

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

Group By	Type	As	Width	Aggregates
Settlement Date	DISTINCT()	Settlement Date	100	COUNT()
Escrow Officer	DISTINCT()	Escrow Officer	100	COUNT()

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



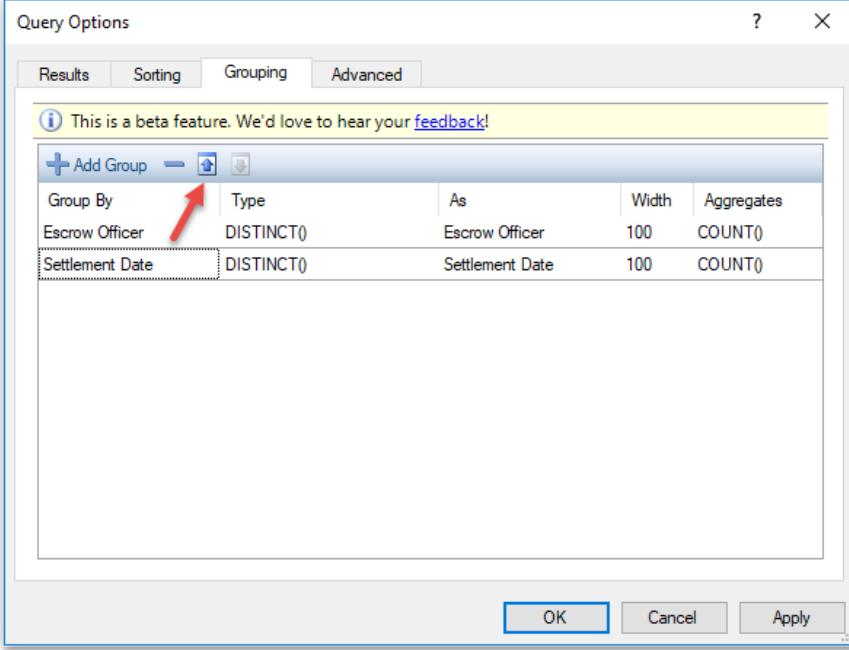
The screenshot shows the 'Grouping Work List' interface. The results are grouped by Settlement Date, then by Escrow Officer. The first group is for 04/18/2019 at 12:00 AM, which has one entry for 'Kathy Closer'. The second group is for 04/24/2019 at 12:00 AM, which has two entries: 'Emily Escrow' and 'Connie Closer'. The third group is for 04/26/2019 at 12:00 AM, which has two entries: 'Connie Closer' and 'Emily Escrow'. Each group shows a summary table with Escrow Officer and COUNT(), and a detailed table with 'Orders'.

Settlement Date	COUNT()
04/18/2019 12:0...	1
04/24/2019 12:0...	2
04/26/2019 12:0...	3

Escrow Officer	COUNT()
Kathy Closer	1
Emily Escrow	1
Connie Closer	1
Connie Closer	2
Emily Escrow	1

Number	Settlement Date	Address	City	Zip	Buyer	Seller	Lender	Escrow Officer
2019040002	04/24/2019 12:00 AM	1236 Any Street	Raleigh	27609	Bob Buyer	Sammy Seller an...	Loans R Us	Emily Escrow
2019040003	04/24/2019 12:00 AM	1234 Any Street	Raleigh	27609	Barbara Borrower	Selling Corporati...	Loans R Us	Connie Closer

- 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.



The screenshot shows the 'Query Options' dialog with the 'Grouping' tab selected. A red arrow points to the upward arrow icon next to the 'Escrow Officer' row in the 'Group By' list, indicating it has been moved to the top of the list. The 'Group By' list now shows 'Escrow Officer' followed by 'Settlement Date'.

Group By	Type	As	Width	Aggregates
Escrow Officer	DISTINCT()	Escrow Officer	100	COUNT()
Settlement Date	DISTINCT()	Settlement Date	100	COUNT()

The screenshot shows the 'Grouping Work List' interface. The top navigation bar includes 'Start Page', 'Grouping Work List \*', and 'Management Console'. Below the navigation is a toolbar with 'Save Results', 'Refresh', and 'Options' buttons. The main content area displays 'Work List Results: 3 items found.' for escrow officers: Kathy Closer, Emily Escrow, and Connie Closer. Each officer has a 'COUNT()' value of 1. A 'Group By Settlement Date' section is shown for each, with Settlement Date 'COUNT()' values of 1 for each date (04/18/2019, 04/24/2019, and 04/26/2019). Below this, 'Orders' sections are shown for each date, listing a single order with details like Number, Settlement Date, Address, City, Zip, Buyer, Seller, Lender, and Escrow Officer. The orders are for 1236 Any Street in Raleigh, ZIP 27609, Buyer Bob Buyer, Seller Sammy Seller an..., Lender Loans R Us, and Escrow Officer Emily Escrow.

### Provide Feedback to SoftPro

You can provide feedback to SoftPro by clicking on the [feedback](#) link on the Grouping tab.

The screenshot shows the 'Grouping Work List' interface with a feedback message being sent. A red arrow points from the 'feedback' link in the 'Grouping' tab of the 'Query Options' dialog to the 'To...' field in the 'Message' tab of the email editor. The 'Query Options' dialog shows a note: 'This is a beta feature. We'd love to hear your [feedback](#)!'. The 'Message' tab of the email editor has the recipient 'betafeedback@softprocorp.com' entered in the 'To...' field. The message body contains the recipient's information: Rose Prasek, Sr. Business Analyst, SoftPro, 4800 Falls of Neuse Rd., Suite 400, Raleigh, NC 27609, with phone number 800-848-0143 x5324 and email rose.prasek@softprocorp.com. The message is titled 'Untitled - Message (HTML)'.

- 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

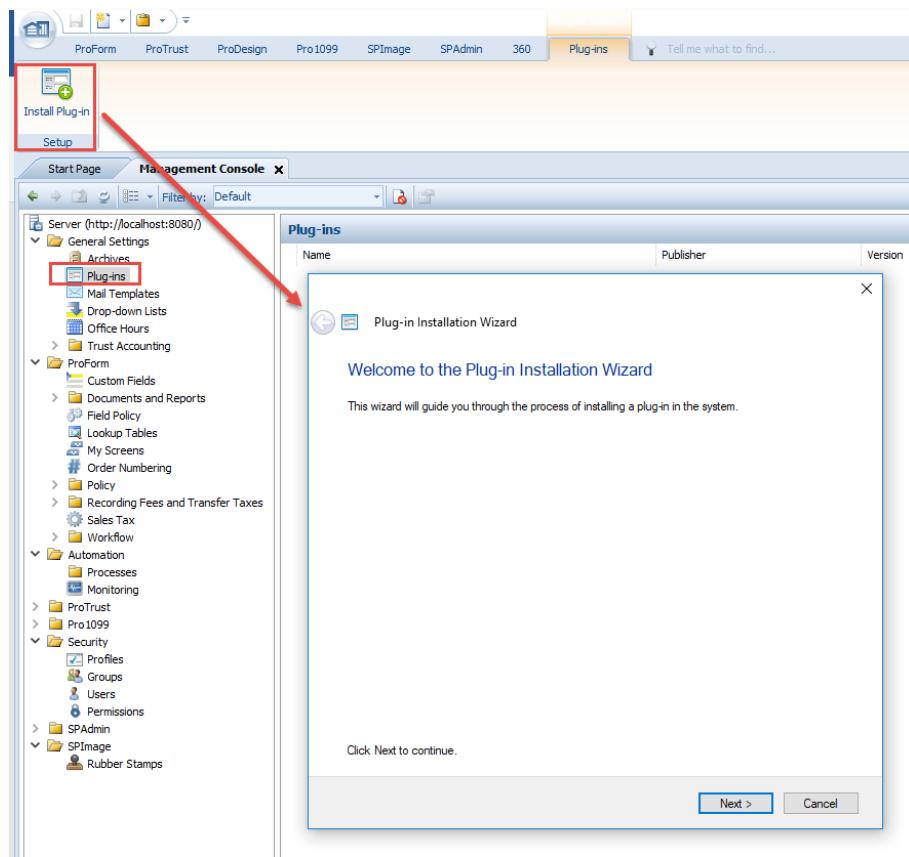
### Plug-ins

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:

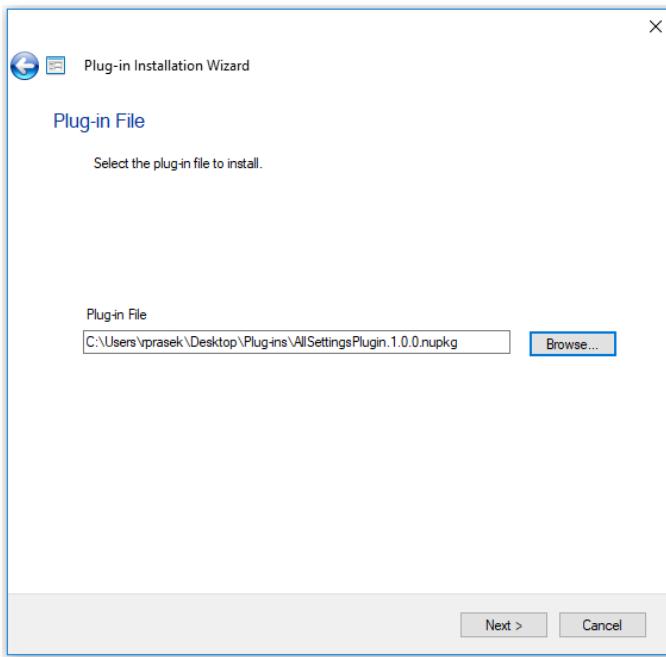
- Added support to specify configuration information in plug-in SDK
- Added an API to associate users and groups with plug-ins
- Plug-ins can be associated with users/groups after installation
- Added the ability to view/add/edit configuration details of plug-ins
- Added the ability to enter license 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:

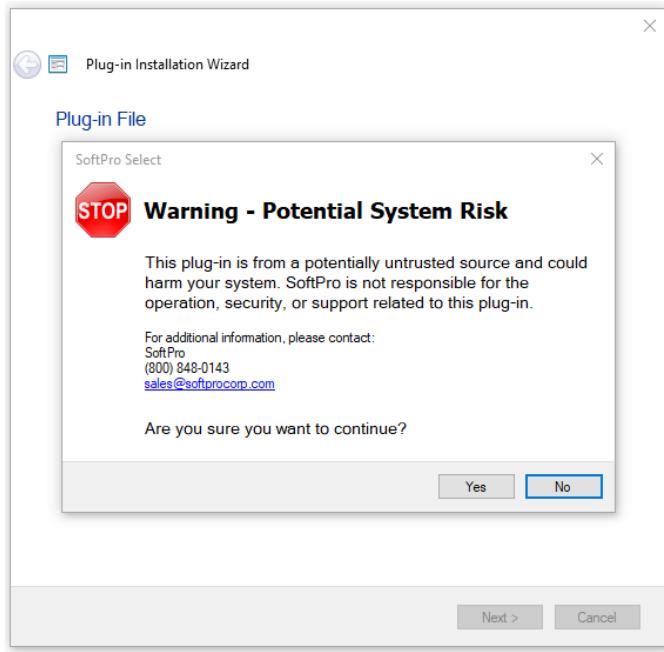
**SPAdmin > General Settings > Plug-ins > Install Plug-in**



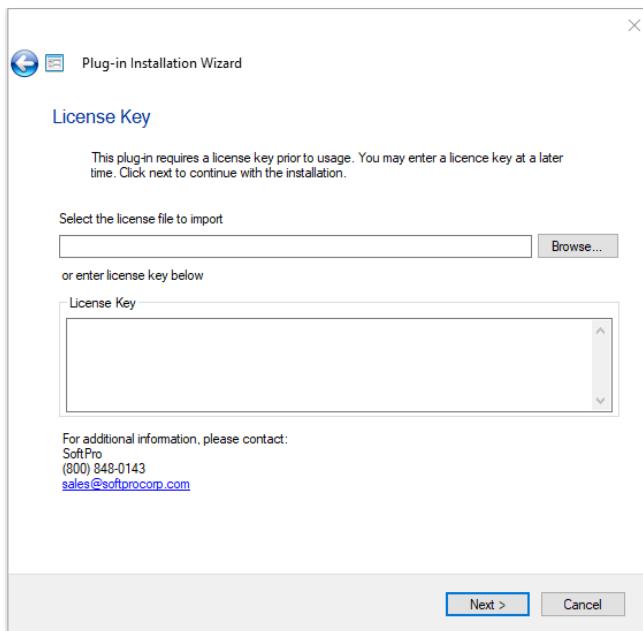
- Click **Browse** to select the plug-in file to install.



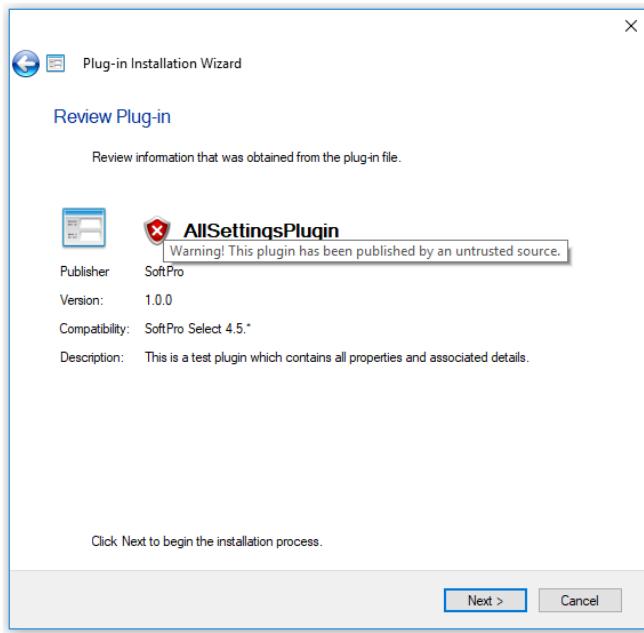
- If the plug-in has not been signed by SoftPro, a Warning will display to the Admin user. To stop the plug-in from installing, click **No**. Click **Yes** to continue installing the plug-in.



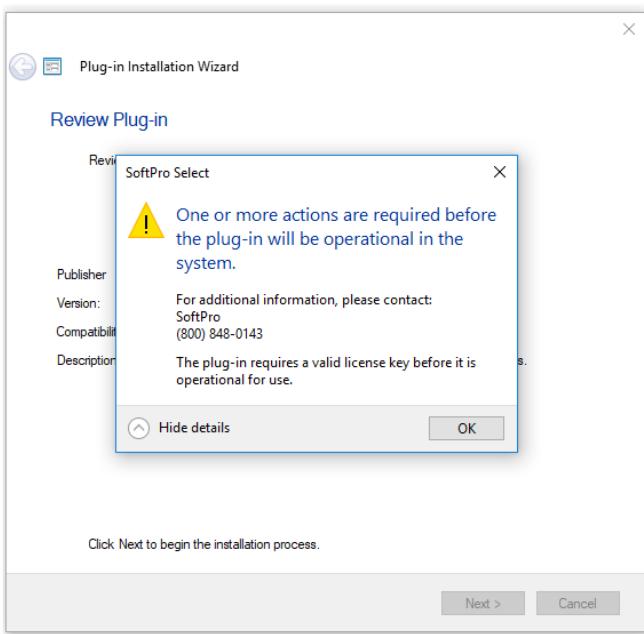
- If the plug-in requires a license key, a License Key screen will display. The license key can be entered either by browsing to the license file or copying and pasting the license key. Plug-ins can still be installed without a license key but will not be enabled until a license key has been entered.



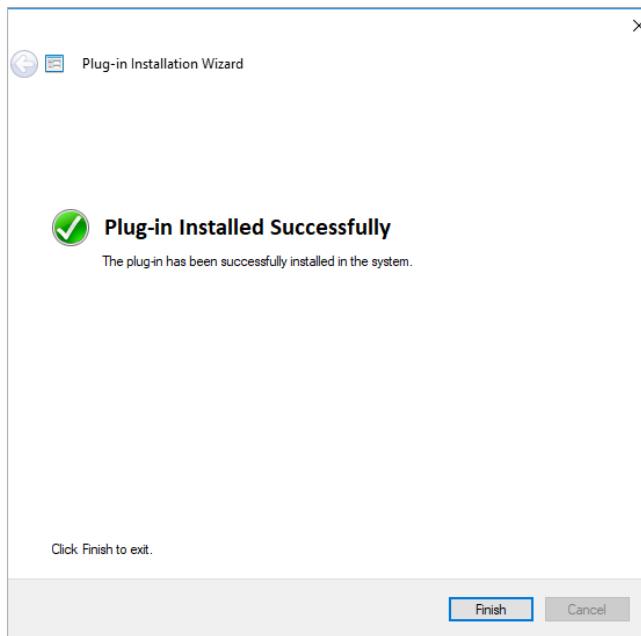
- Prior to installation, a Review of the Plug-in will display. For plug-ins that have not been signed by SoftPro, a warning will display.



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



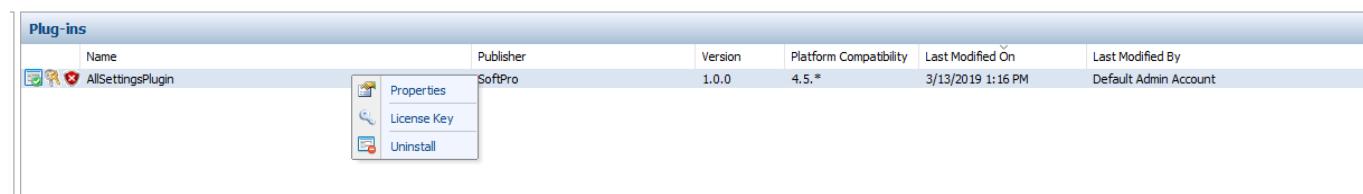
- When the plug-in has been installed successfully, the following screen will display.



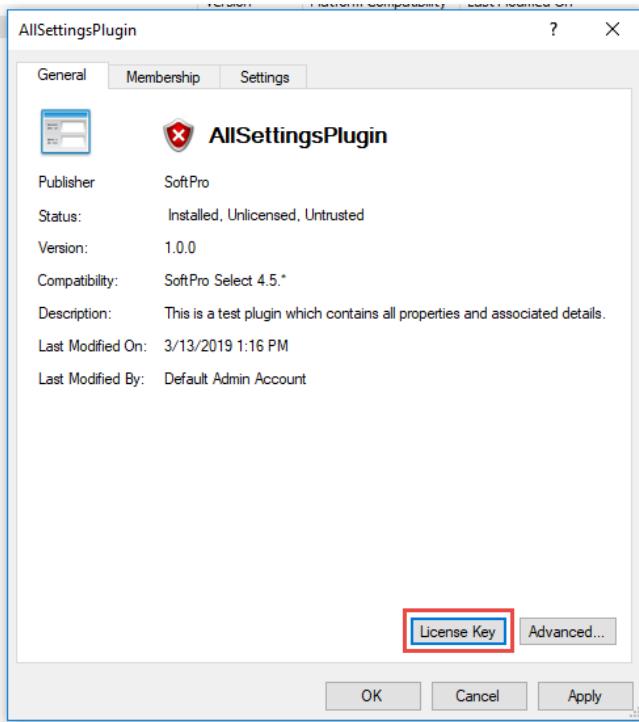
- The management console displays the plug-in information and status icons. Hovering over the icon will display a tooltip showing the status.



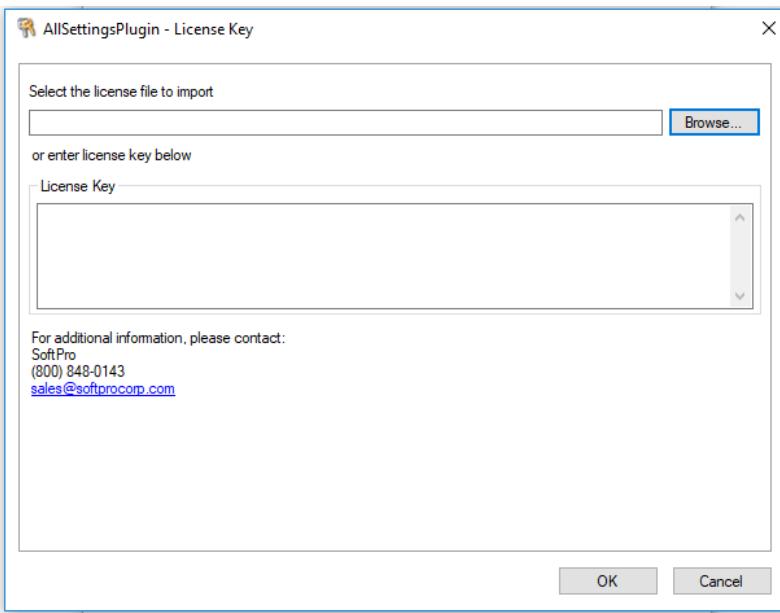
- Access the Properties page by double-clicking the plug-in, or right-click to access the plug-in, enter a license key, or uninstall the plug-in.



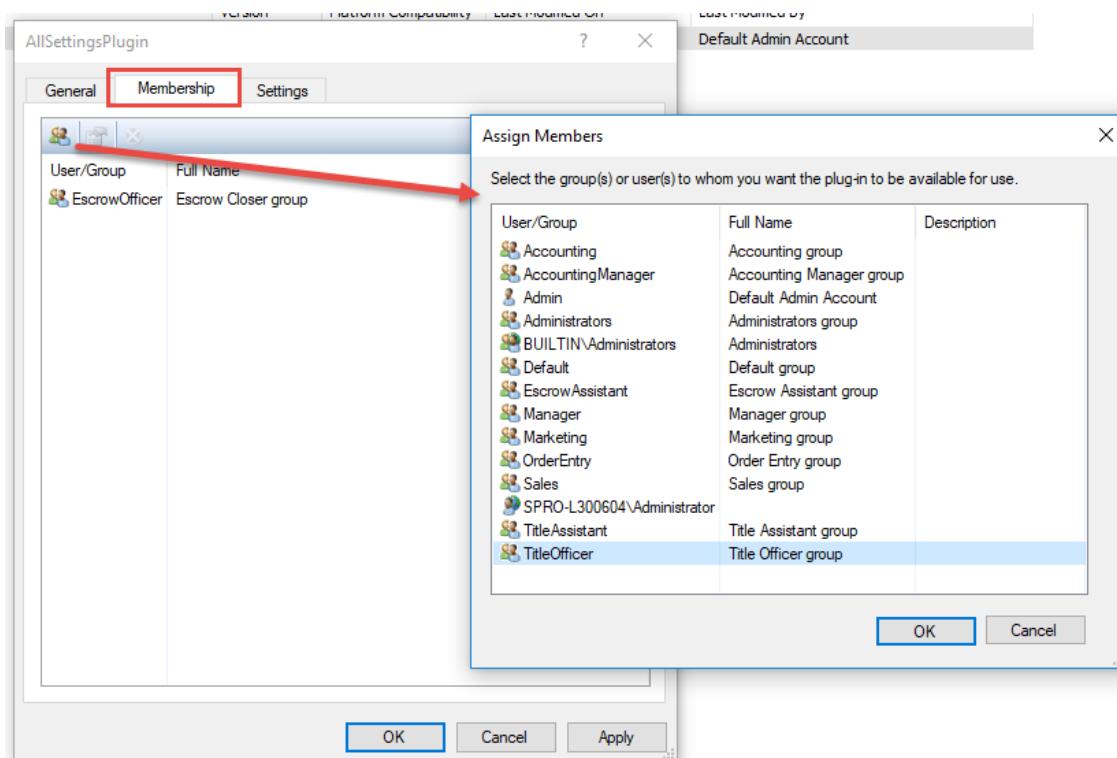
- You can associate members, configure settings (if applicable), or enter a license key from the properties dialog. To enter a license key on an installed plug-in click the **License Key** button.



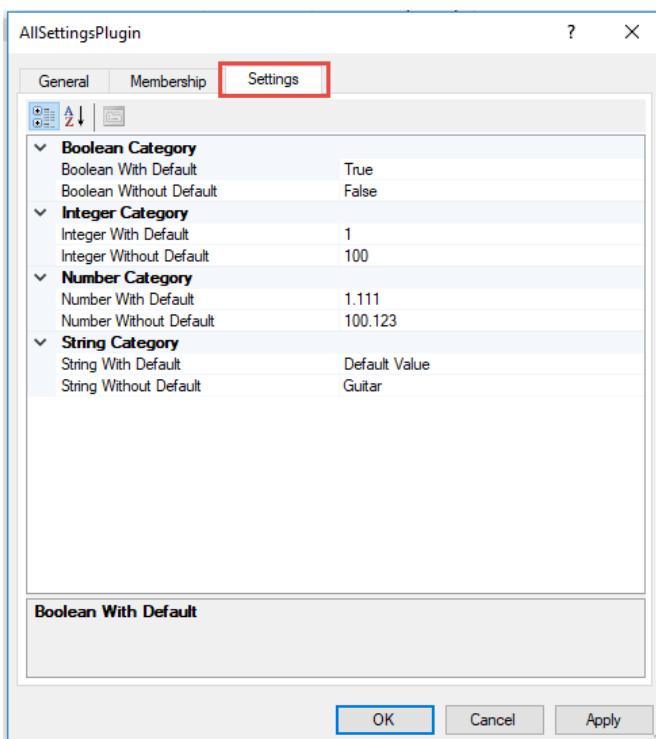
- Enter the license key by browsing to the license file or copying and pasting the license key.



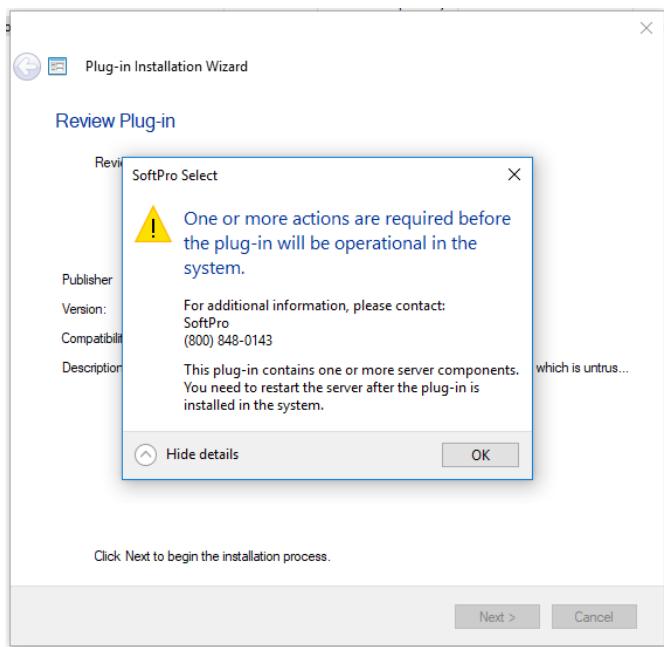
- To associate users/groups with a shell package plug-in, click on the **Membership** tab. If the plug-in license requirements are satisfied but no User/Group is added, the plug-in will not be available to any users. When User/Group is added or removed they will be added or removed when the client is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



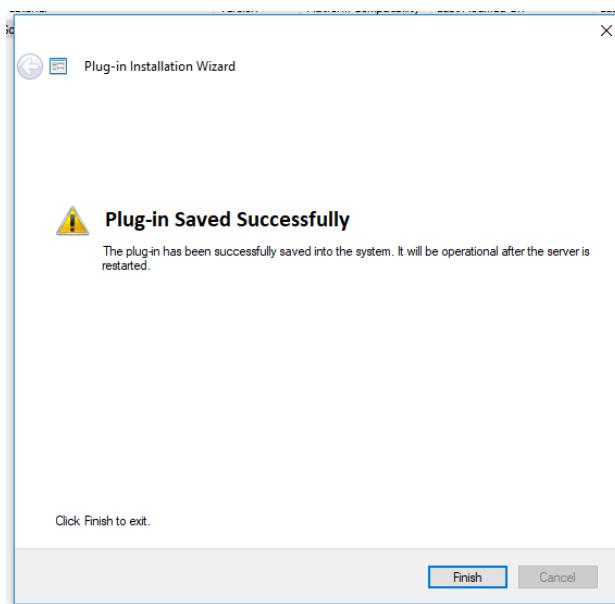
- If the plug-in has configuration settings, a **Settings** tab will display. Click on the tab to select the settings.



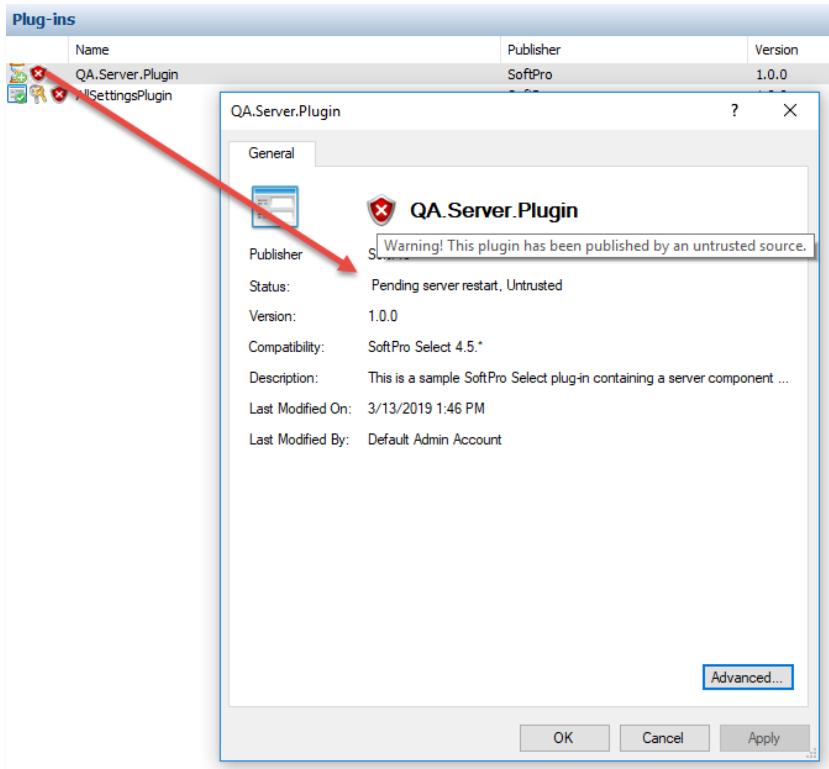
- When installing a plug-in that contains one or more server components, a warning message will display prior to installation.



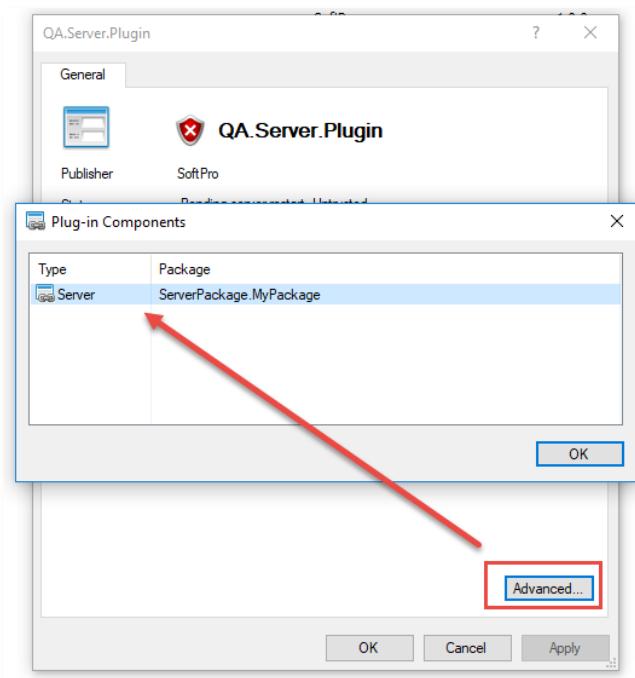
- After installation, the following dialog will open.



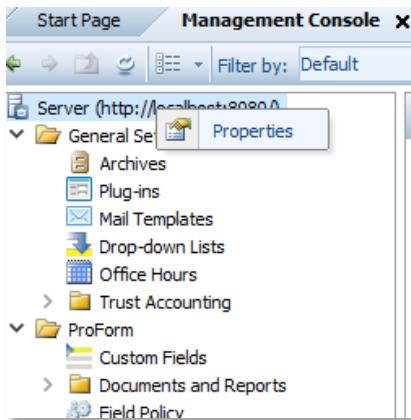
- The properties dialog for a plug-in that contains a server component will show a Status of 'Pending server restart' and if the plug-in was not signed by SoftPro it will also show 'Untrusted'. A plug-in can contain shell and server components, and will need to be restarted whenever there is a server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



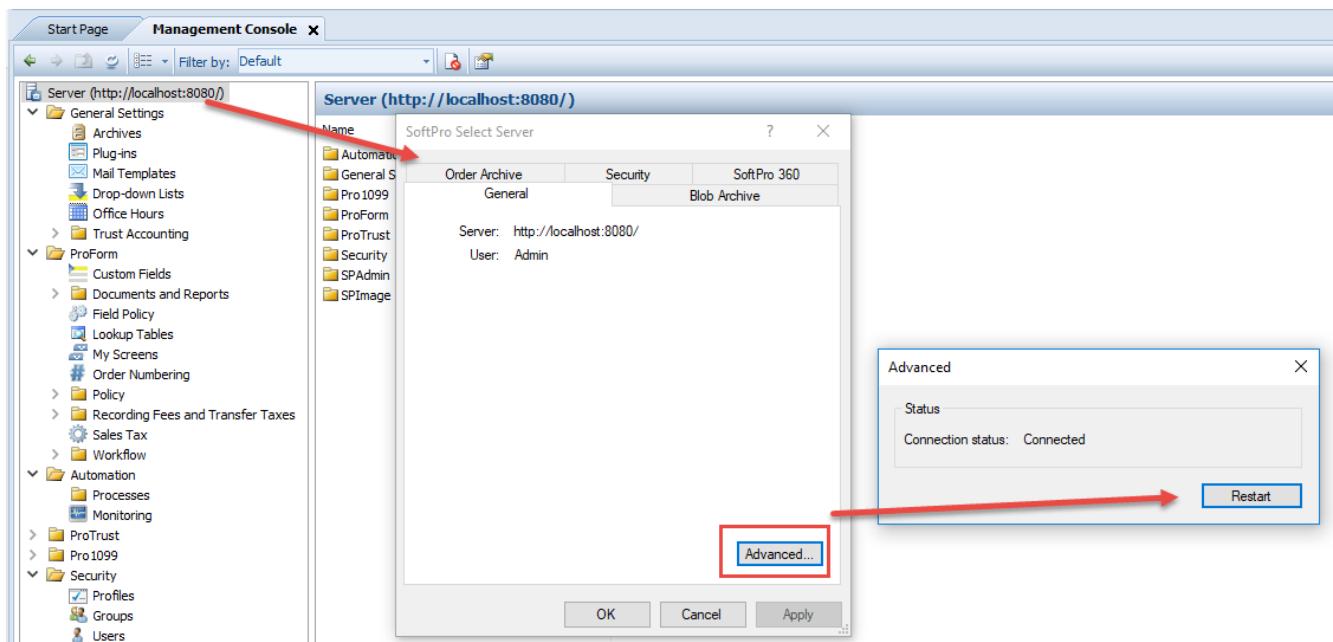
- Click the **Advanced** button to view details regarding the plug-in.



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



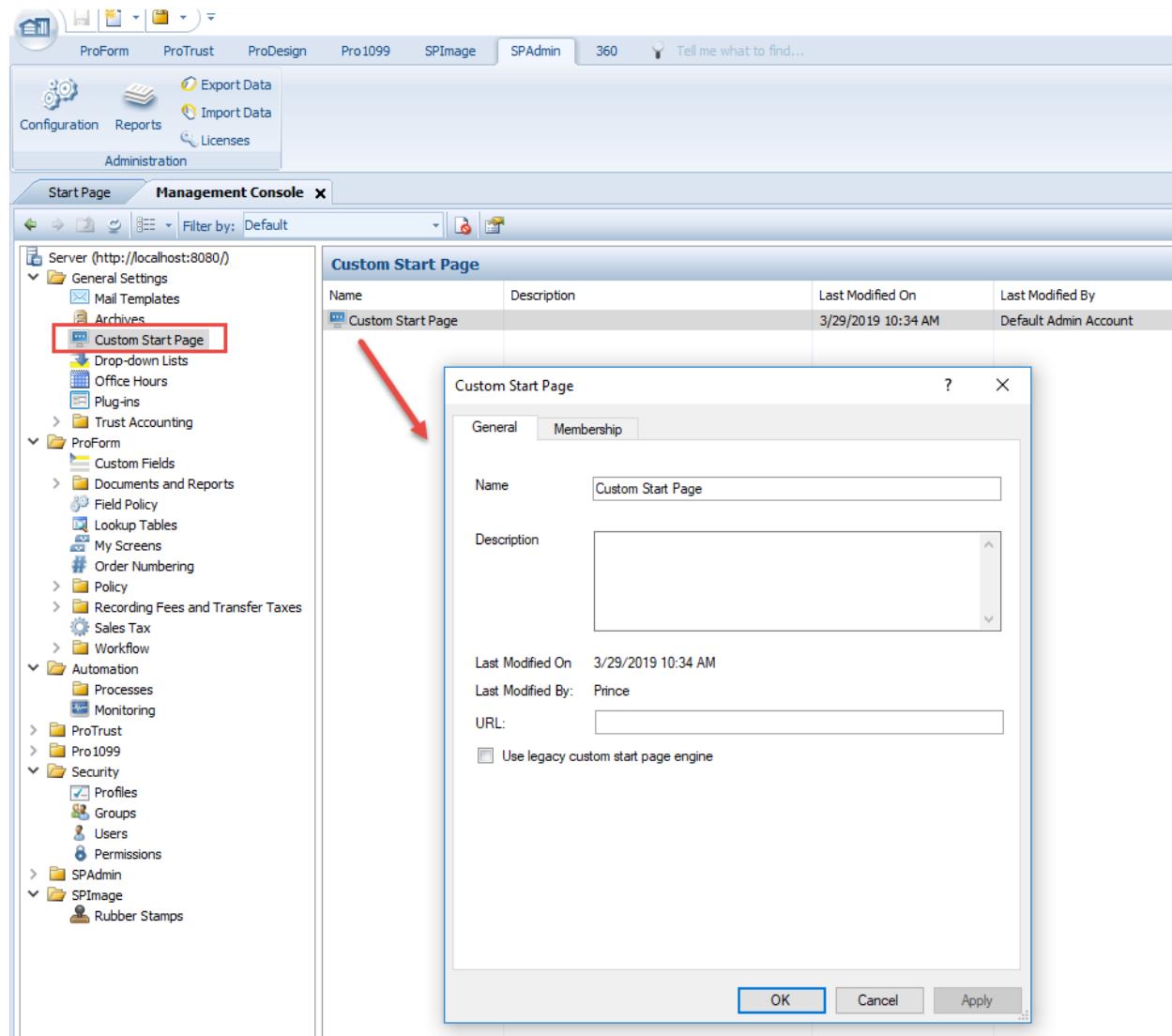
- On the General tab, click the **Advanced** button to restart the server. Once the server has been restarted, the plug-in will be available.



## Custom Start Page Manager

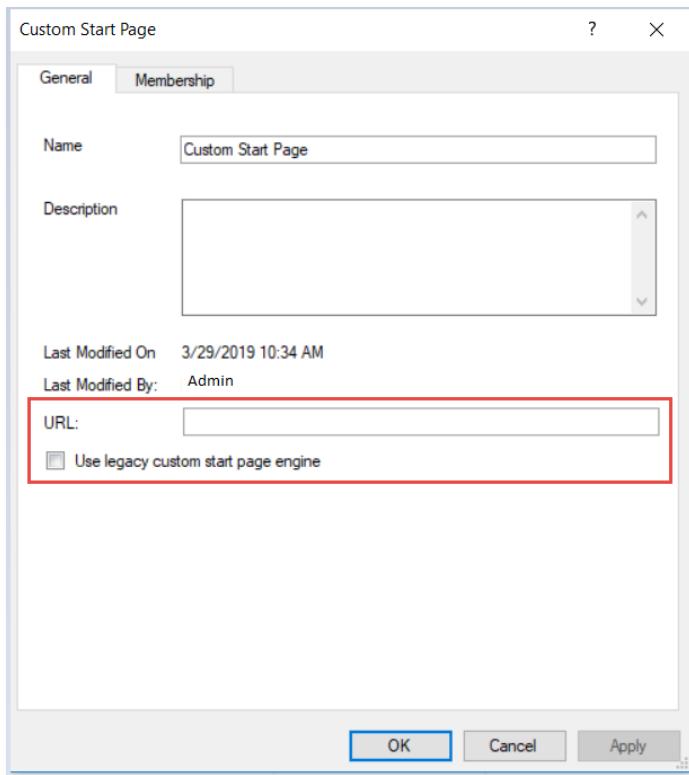
For customers that have a *custom* start page, a new Custom Start Page Manager has been created. This is an optional screen and only needs to be used when a different Select start page is used.

The new Custom Start Page Manager is located here:

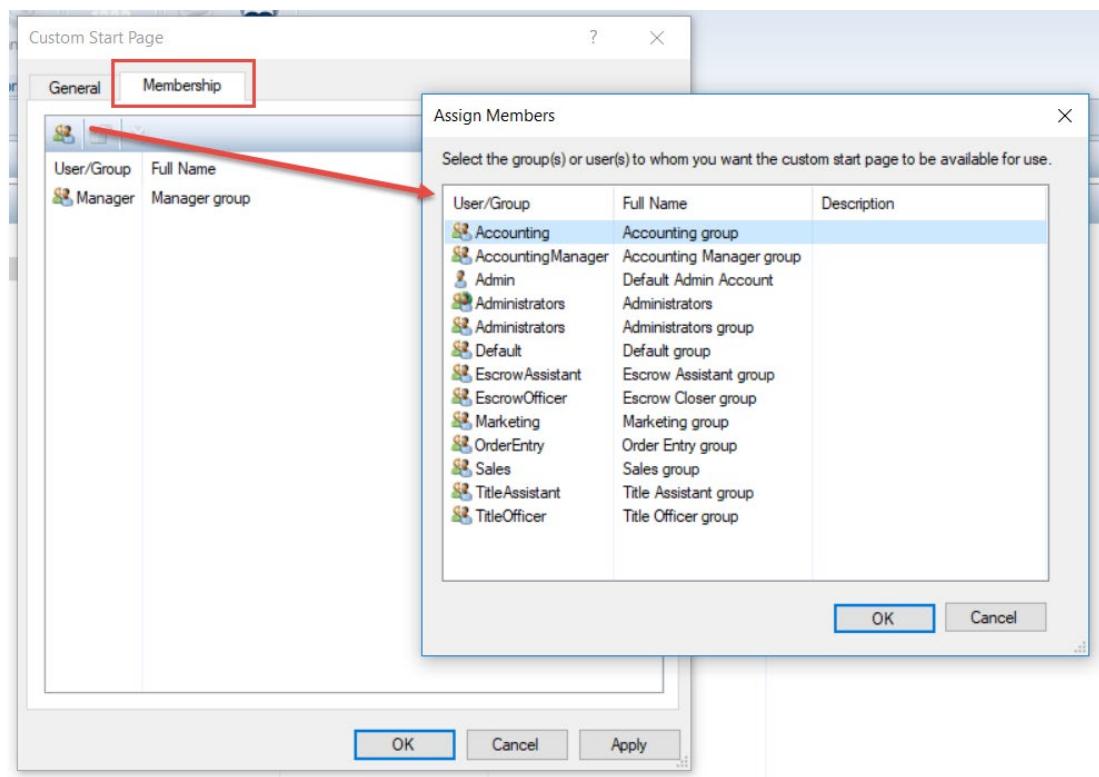


- When a different start page should display, the Admin should enter a URL for that page. This will replace the entire start page. The new start page engine is supported by a chromium browser. If

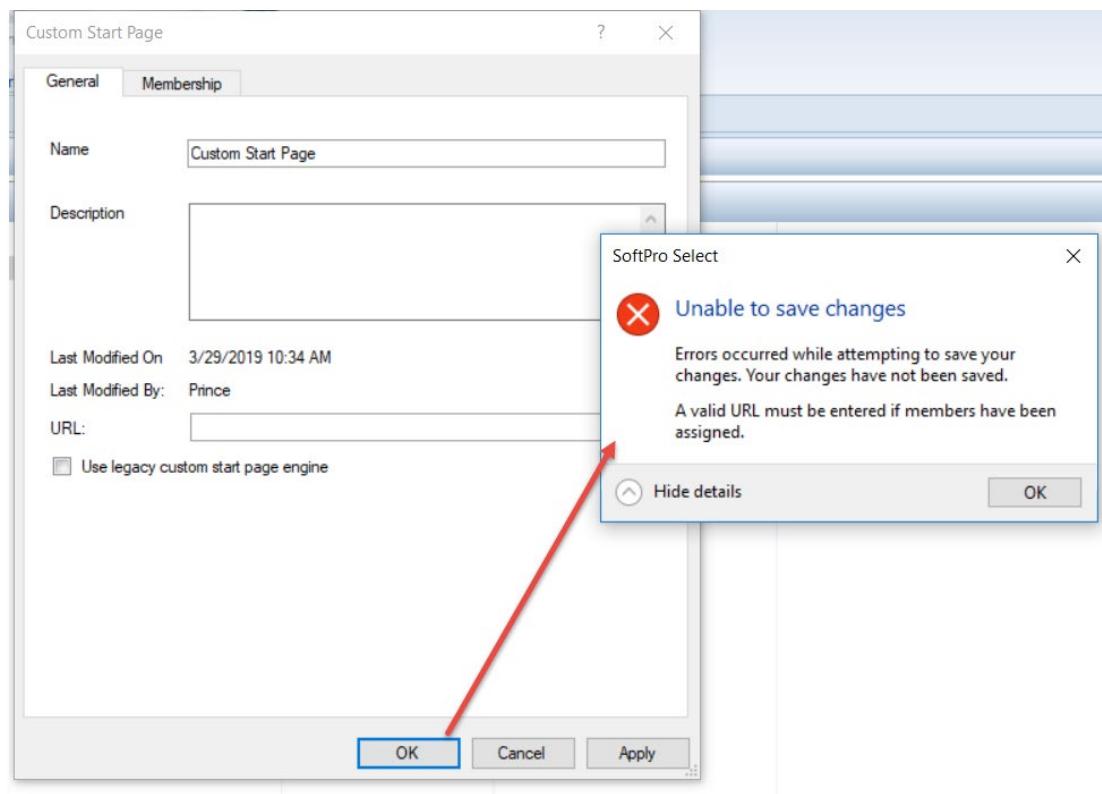
the legacy custom start page engine should be used, select the **Use legacy custom start page engine** checkbox. This is only enabled when a URL is entered.



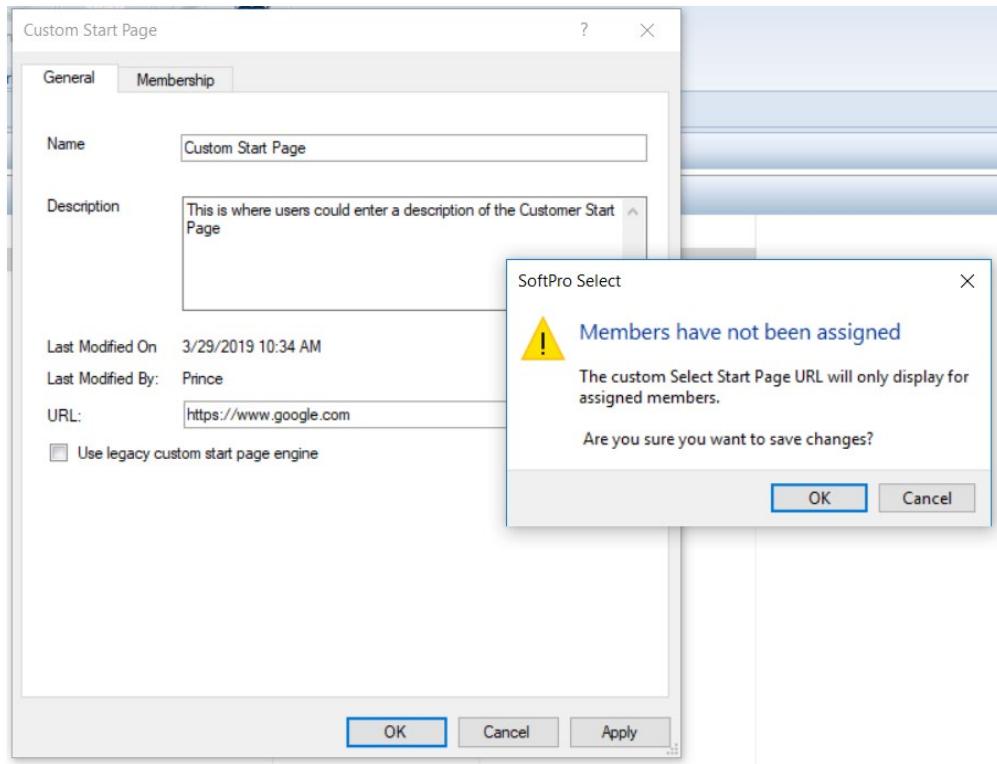
- When a custom URL is entered, only users/groups that have been assigned on the Membership tab will see the custom start page.



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

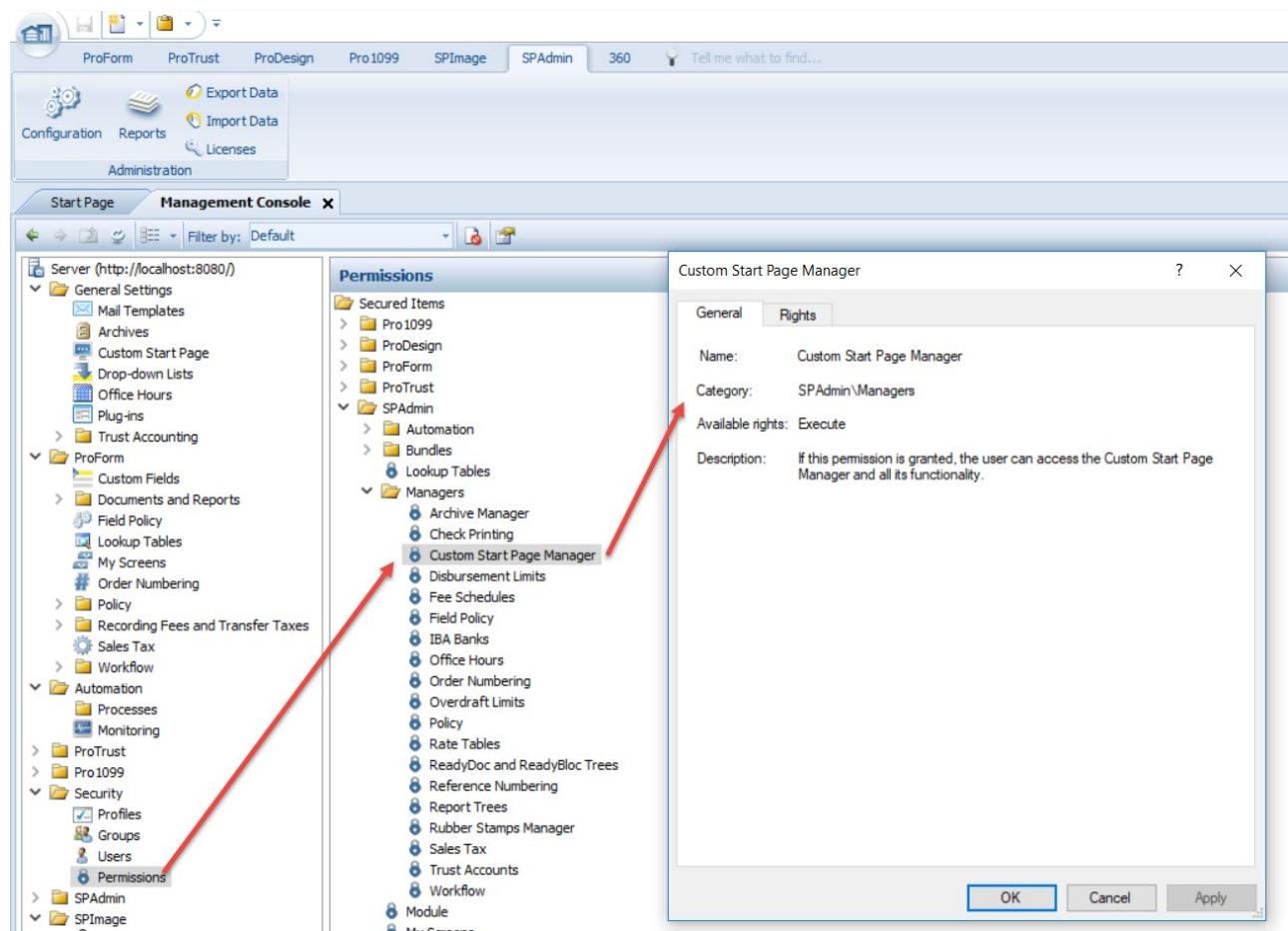


- If a URL is entered but no members have been assigned, the user will see the following warning. The information could still be saved, however the custom start page will not display until members are assigned. Once members are assigned, only the members assigned will see the custom start page. All other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



### Custom Start Page 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](#)

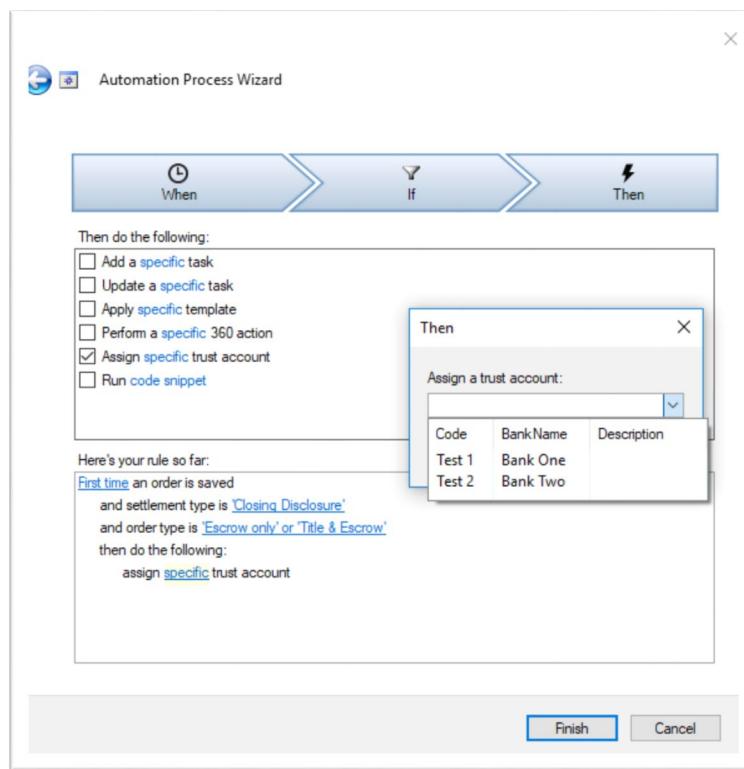
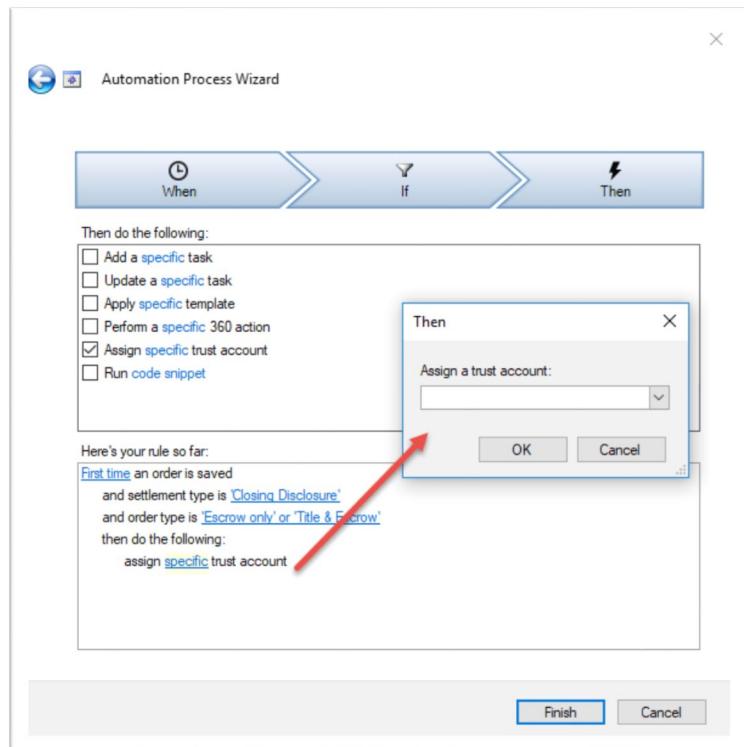
### Work Automation

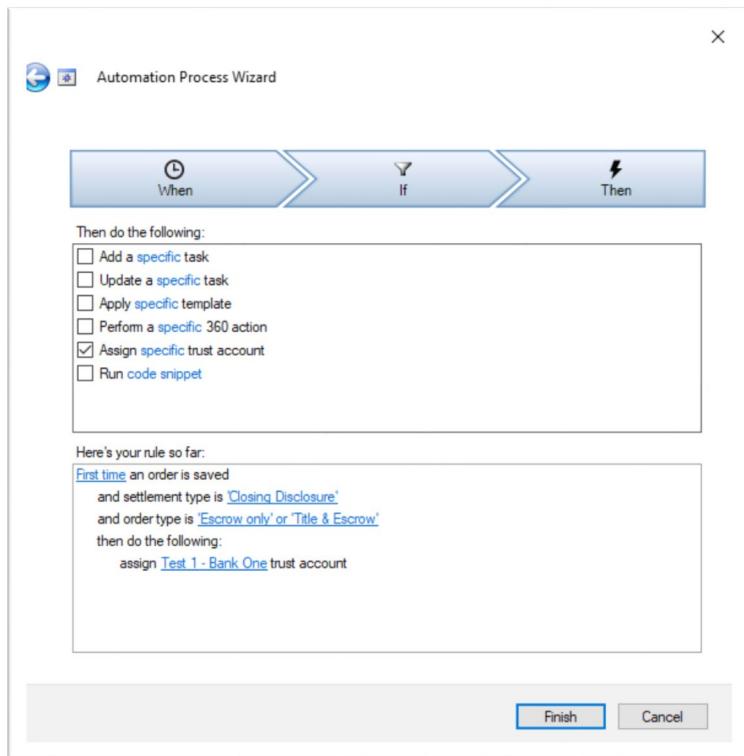
New enhancements have been added to the Automation features:

- 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.





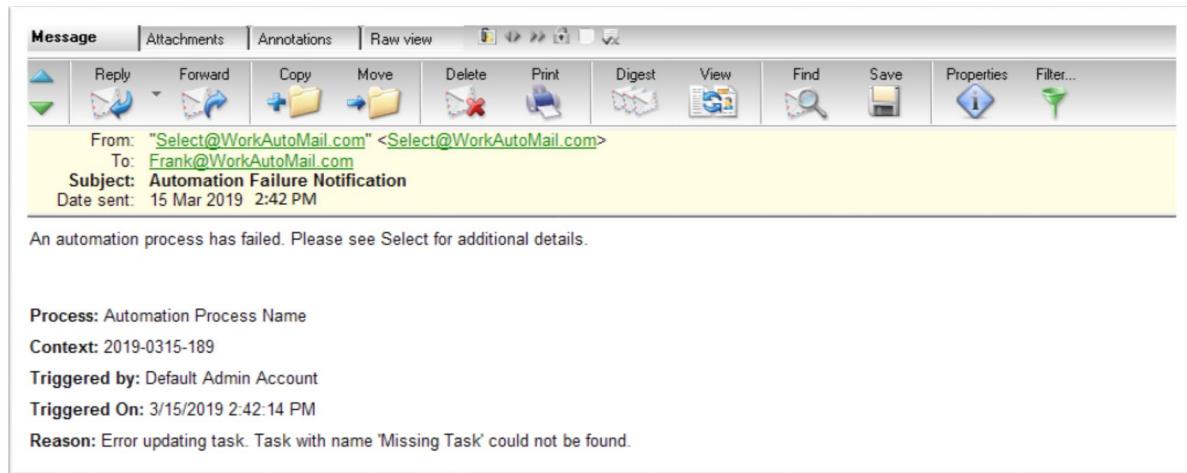
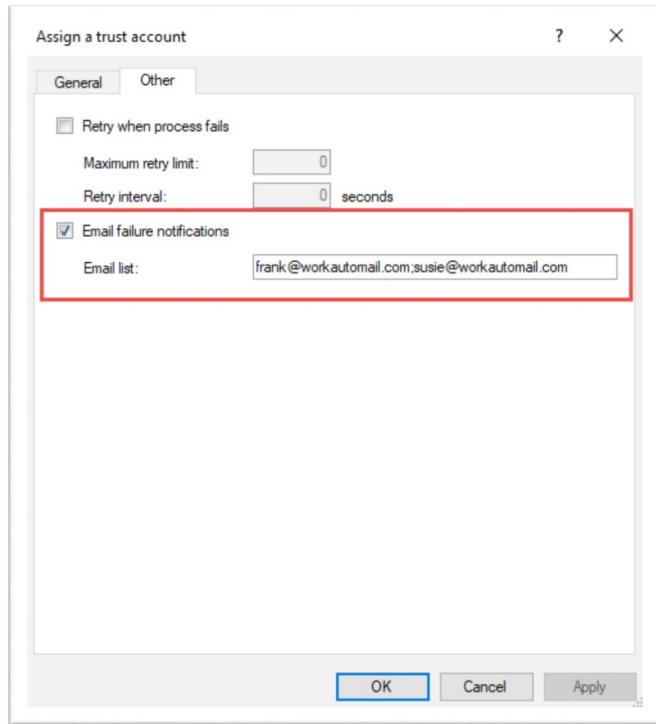
- If a trust account already exists in the order, the process will fail and the error message will indicate the reason: “A trust account has already been assigned to this order.”

Monitoring						
<span>Filter</span>						
Status	Process	Context	Triggered By	Triggered On	Category	Reason
<span>✗ Failed</span>	Assign a trust account	2019030001	Default Admin Account	3/14/2019 2:35:00 PM	Escrow	A trust account code has already been assigned to this order.

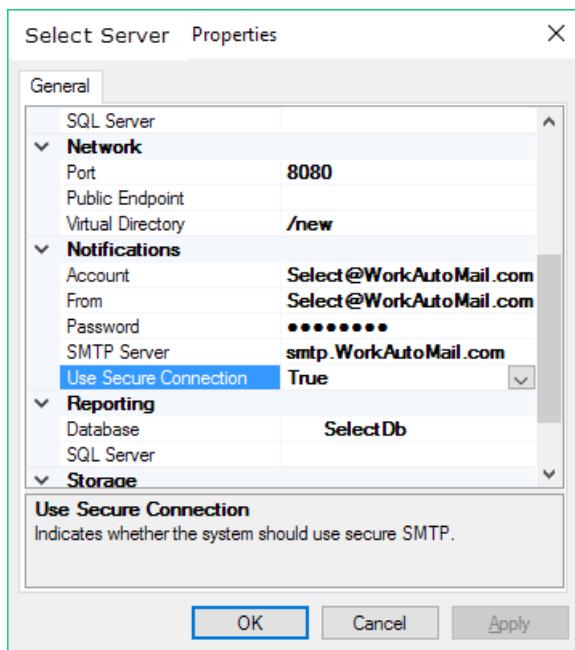
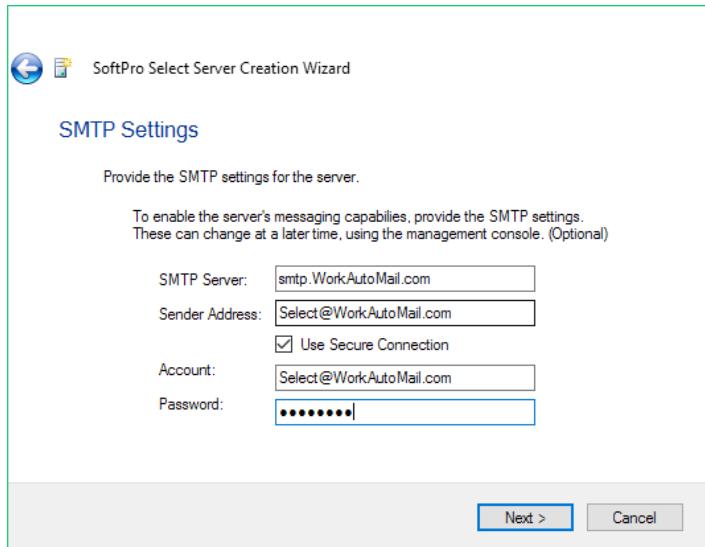
### Email Notification when an Automation Process Fails

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 SMTP settings configured for this feature to work. This can be configured during install or in the Select Server Properties dialog.



## 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 news feed database table.

If 3<sup>rd</sup> 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*

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#### 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](#)