



SoftPro Select 4.6.5

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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.
- **Automation**
 - You can now add incoming and outgoing emails to attachments in an order, or save them to a file location.
- **Bug fixes**

ProForm

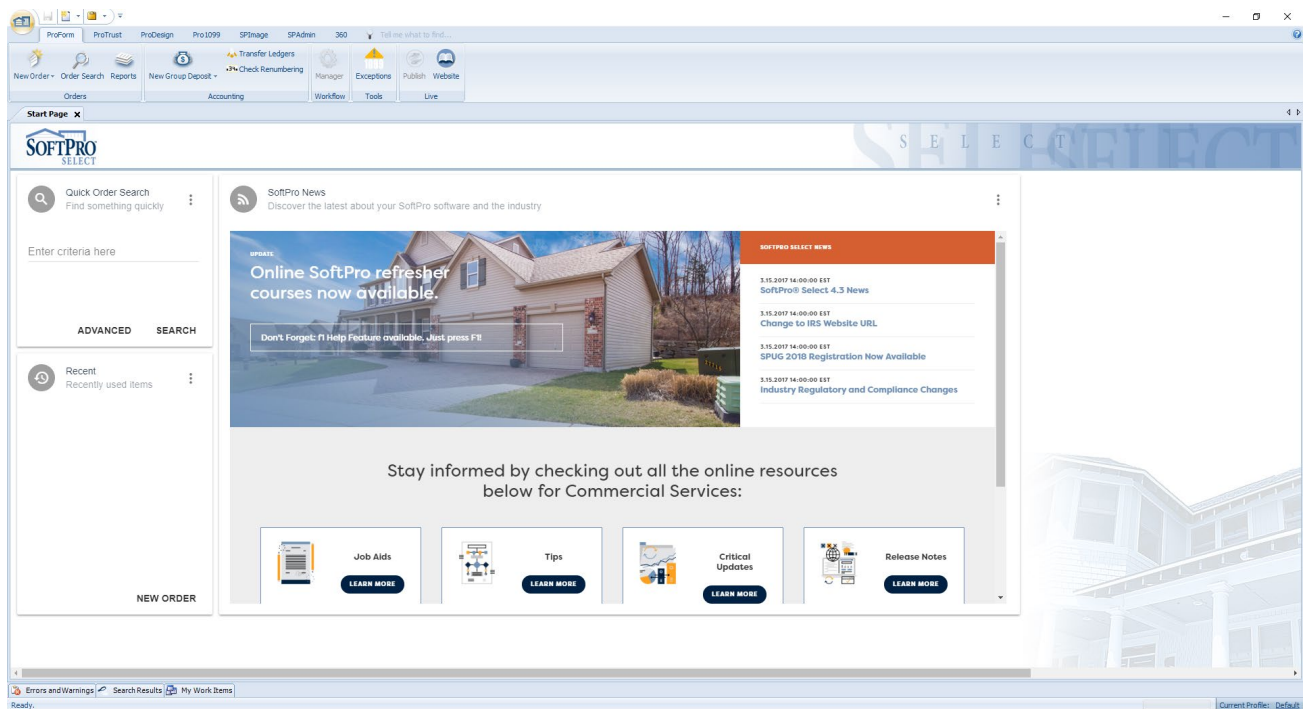
Select Start Page

- 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

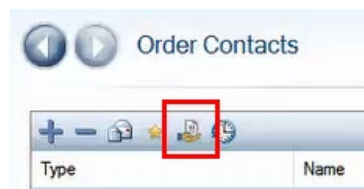
If you have a *custom* start page, a new Custom Start Page Manager has been developed. This is an optional screen and only needs to be enabled when a different start page should be used. For more information, see [Custom Start Page Manager](#) in the SPAdmin section.

Order

Order Contacts

Commitment Recipient

- 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.

Lender

Lookup code:

Name:

Short name:

Payee name:

Marketing rep.:

Save And Add New

☐ Include on revenue reports

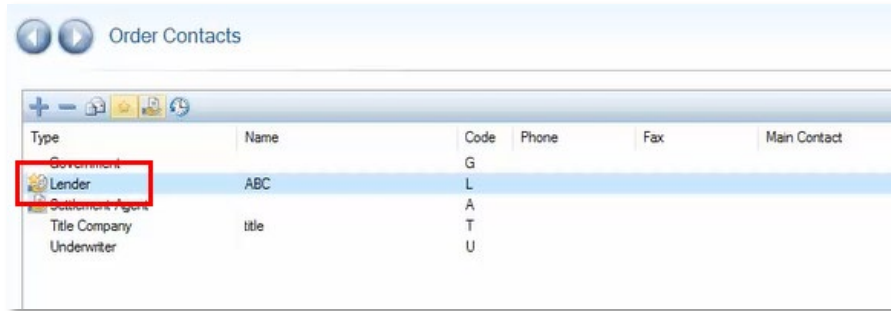
☐ Marketing source

☒ Commitment recipient

- 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.



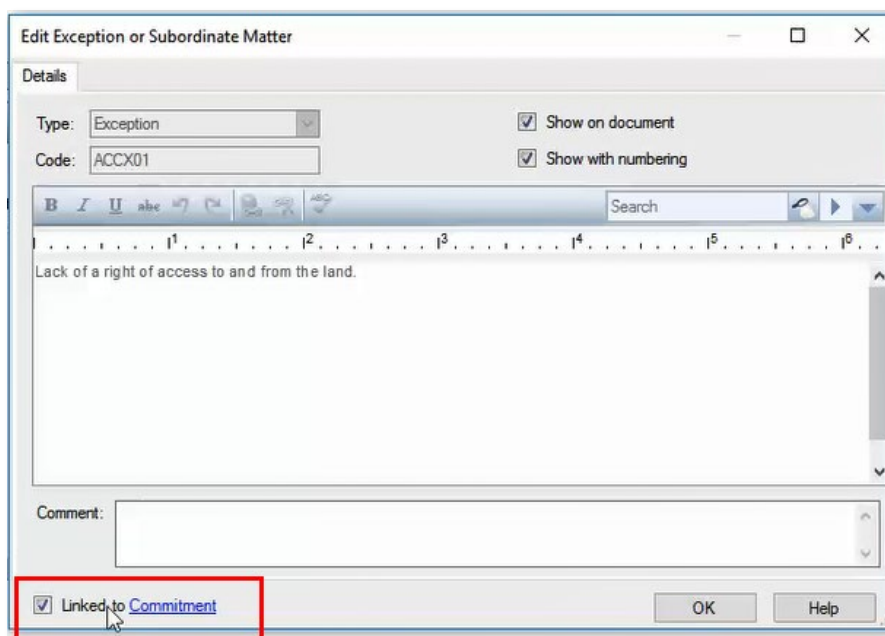
- When the lookup table for zip codes had filtering turned on, entering in zip codes and pressing Tab was not auto-populating the related fields; *resolved*. 11752
- The License ID was not defaulting for contact people when that person was added to a contact automatically via the Escrow Officer/Closer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

Title

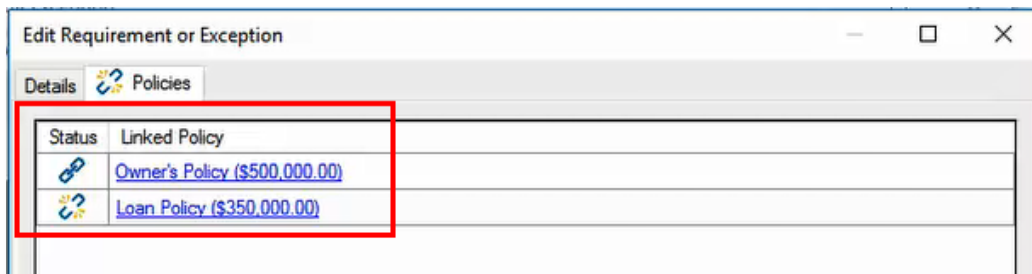
Linking Policy and Commitment Exceptions

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

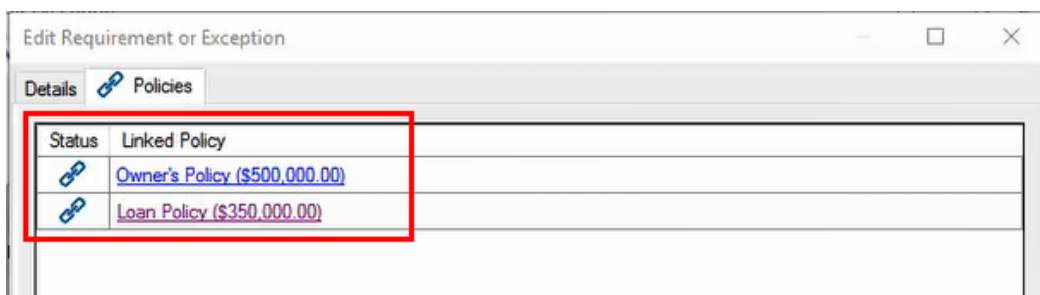
- On the Policy - Schedules B1, B2 screen, click the **Start Policy** button, then click on an Exception.
 - The Edit Exception or Subordinate Matter pop-up has a new checkbox: **Linked to Commitment**.



- 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.



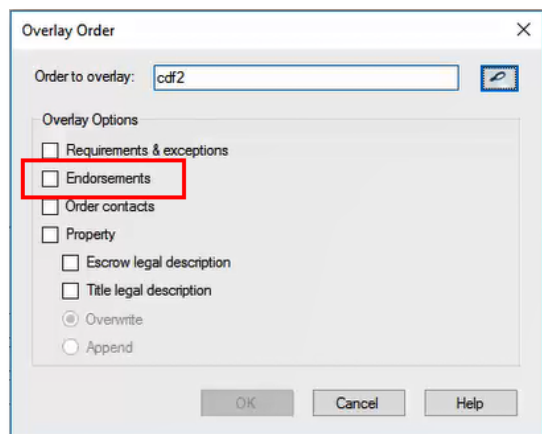
- If all of them are linked, the tab icon will show as linked.



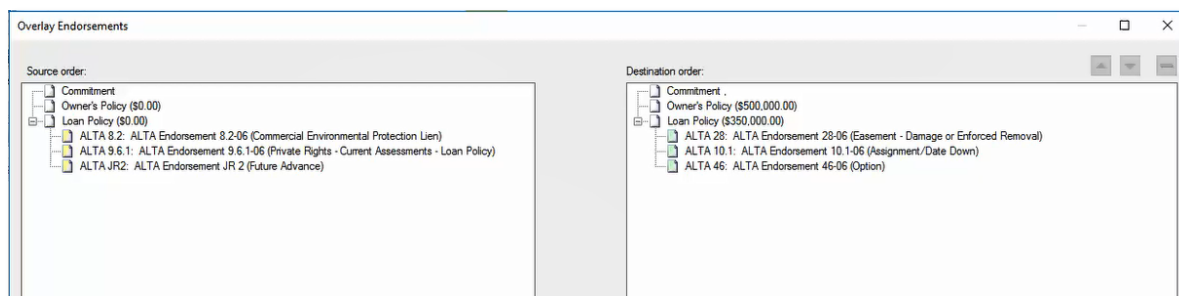
Overlay Endorsements

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' window. At the top, there are navigation arrows and the title 'Endorsements'. Below this, the 'Title product:' is set to 'Loan Policy' and the 'Coverage amount:' is '\$350,000.00'. A toolbar contains a '+ - Default Splits...' button and two circular icons. The main area is a table with the following data:

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.

This screenshot is similar to the previous one, but the toolbar area is highlighted with a red rectangle. The toolbar includes a '+ - Default Splits...' button and two circular icons. The table below it shows the endorsements sorted alphabetically by description:

Description	Pro Forma	Issued 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.

Interim Interest

Interim interest to be paid: **At Closing** Line:

Per diem decimal digits: **At Closing** not round per diem

Per diem based on: **None** year ☐ Use 30-day months

Per diem from date of: **Disbursement**

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

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

Loan: **1** (\$1,200,000.00)

Loan Terms

Annual interest rate: **4.00000** % Rate set d

Payment frequency: **Monthly** Plural:

Total term years: **30** Total term months: **36**

☐ Loan balance

☐ Prepayment penalty

Balloon after: **year(s)**

Payments

First payment date: **06/01/2019**

Principal and interest: **\$5,728.98**

First payment amount: **\$5,728.98**

Late charge type: **Percent of Principal & Interest**

Interest rate after default: **4.00000** %

Interim Interest

Interim interest to be paid: **At Closing** Line:

Per diem decimal digits: **2** Do not round per diem

Per diem based on: **365** days per year ☐ Use 30-day months

Per diem from date of: **Disbursement**

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

CSS Line	Description	Amount
Default		
(None)		
CSS		
Next Available (Total Consideration)		
Next Available (Prorations/Adjustments)		
Next Available (Payoffs)		
Next Available (Loan Charges)		
Next Available (Title/Escrow Charges)		
Next Available (Recording Charges)		
Next Available (Miscellaneous Charges)		
CON.01	Principal Amount of New L...	\$1,200,000.00
PRO.01		
PAY.01		
LOAN.01		
TITL.01		
REC.01		
MISC.01		

- 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 ☐ Use 30-day months

Per diem from date of: Disbursement

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

Line: LOAN.01 [CSS](#)

☐ Do not round per diem

- 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			<input type="checkbox"/>		\$1,841.14
<Click here to add a row>						

Documents & Attachments

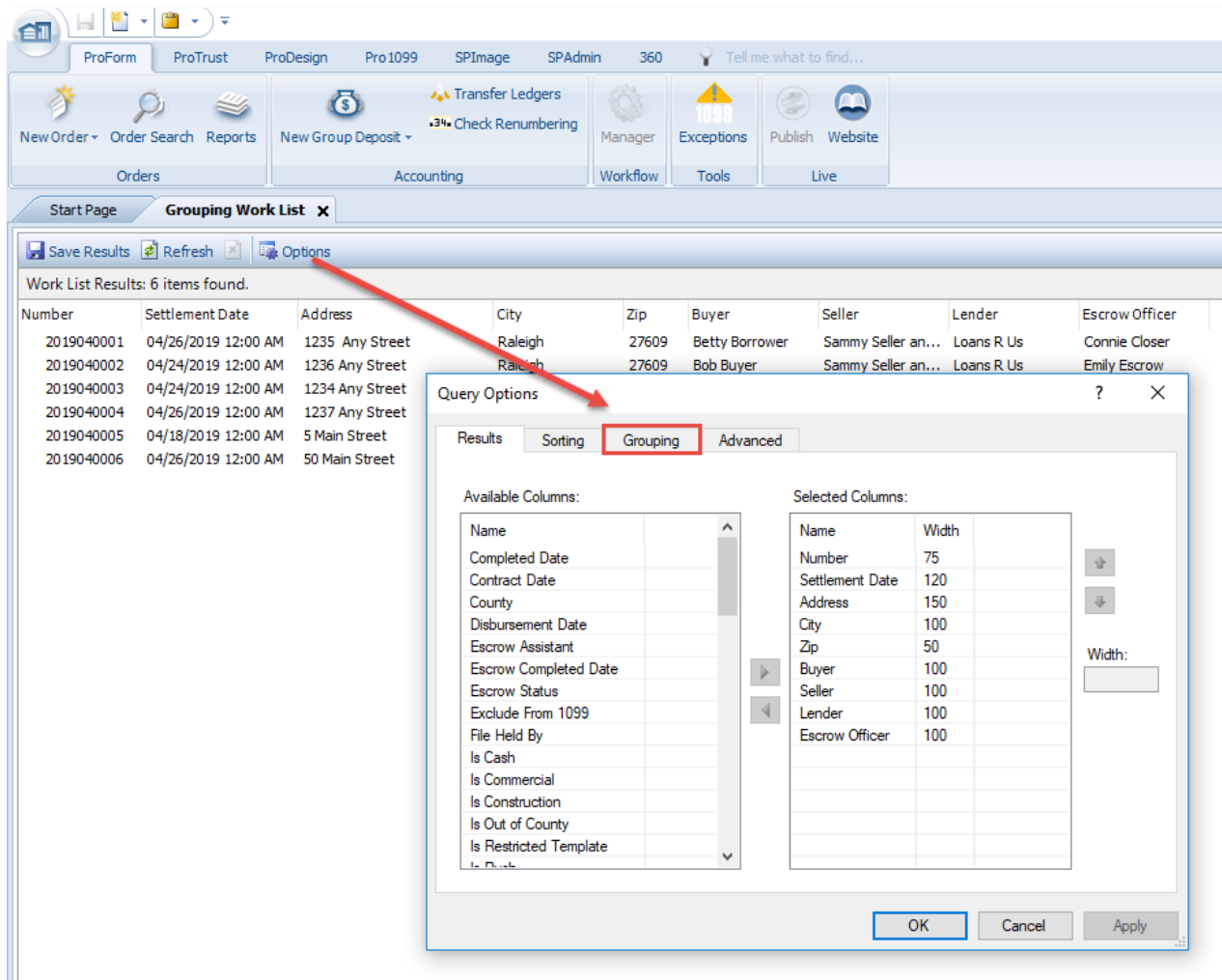
- The Drag and Drop function from the Select Attachments to the desktop was not working properly, requiring multiple attempts, and sometime incurring an error; *resolved.* 11046
- Moving an attachment from one folder to another could result in duplicate copies and an error message when trying to open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

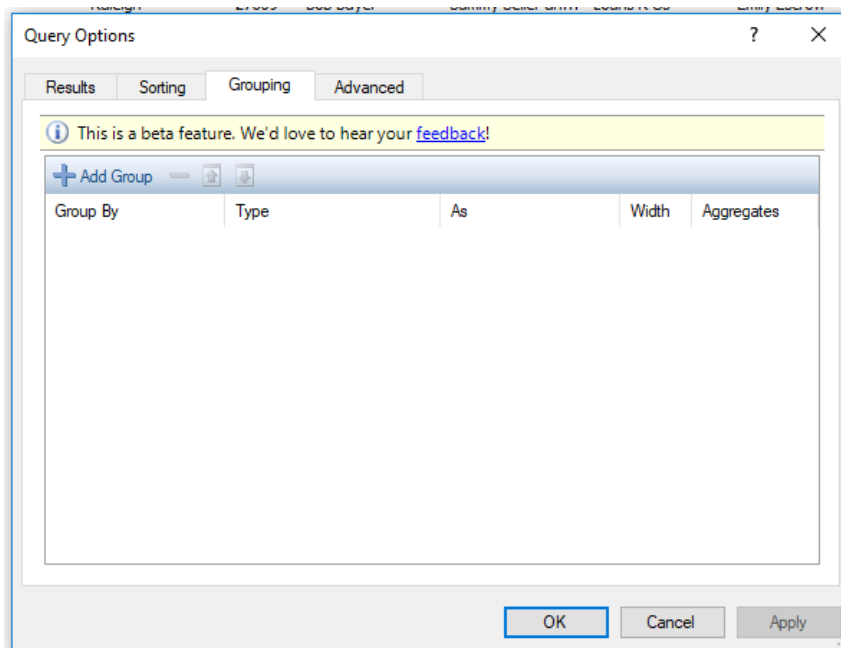
- Provides the ability to group worklist results
- Users now have the ability to provide feedback on this feature

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.

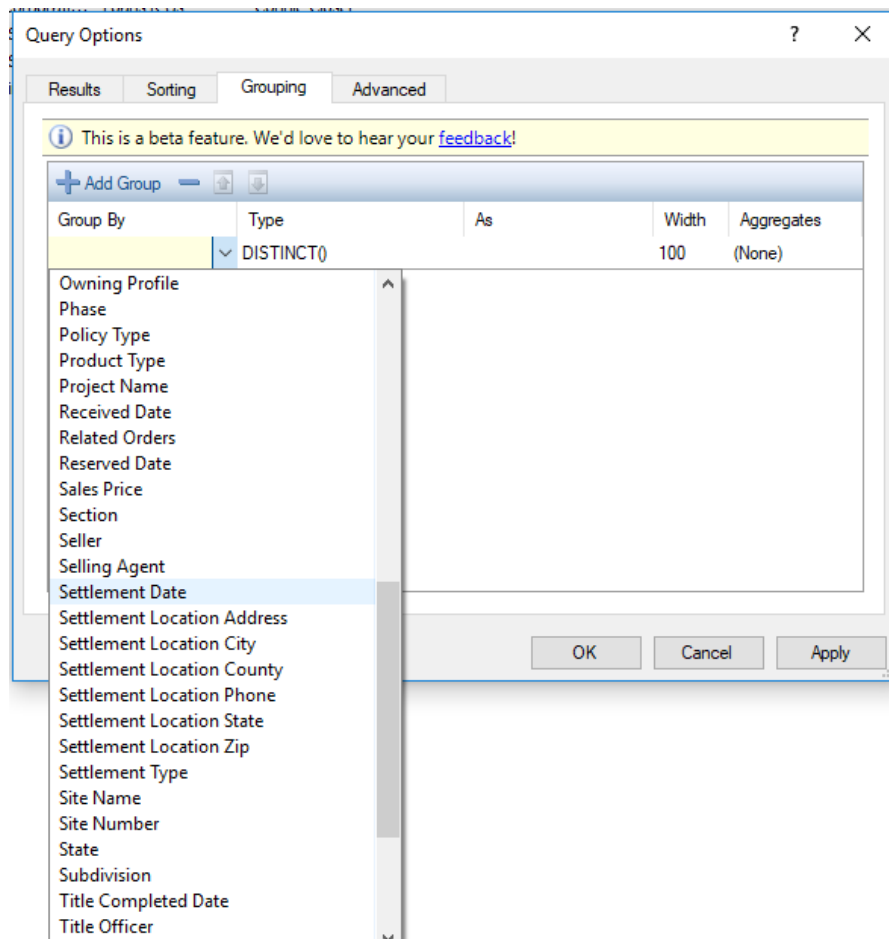
- After running a Work List query, click **Options** to see a new Grouping tab on the dialog.



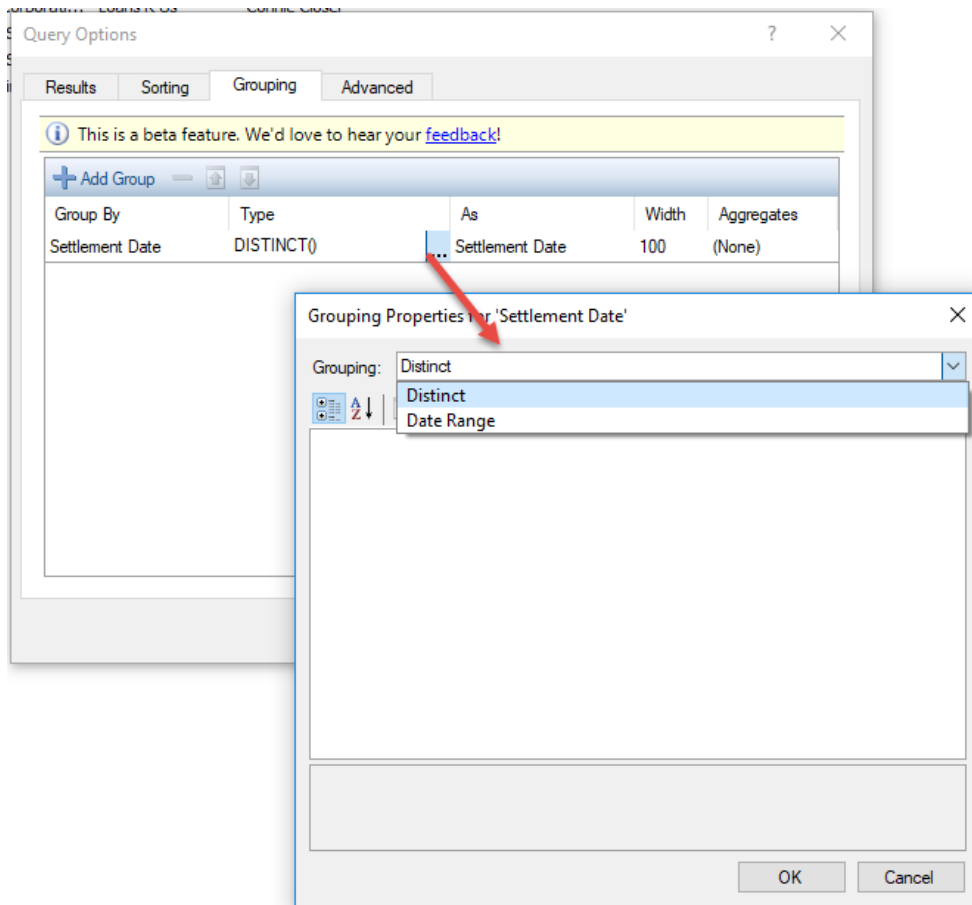
- Click the **Grouping** tab to enter new groupings.



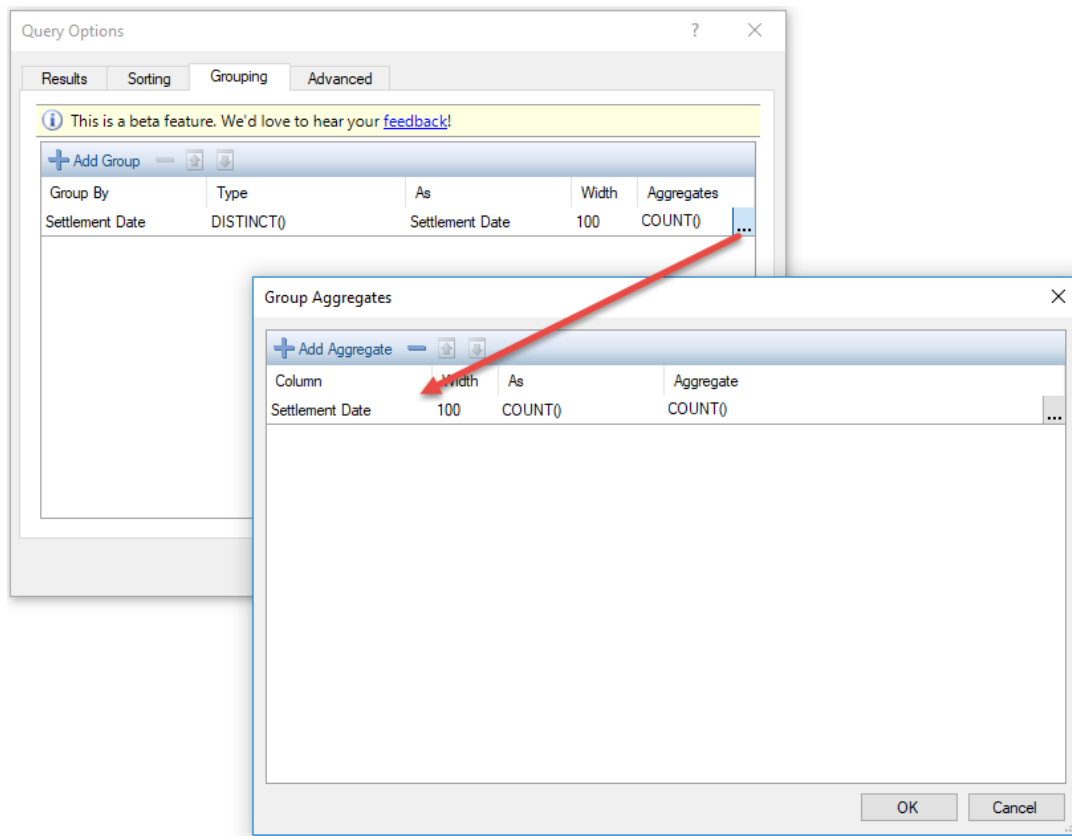
- To add a new grouping, click the **+Add Group** button.
- Select a method to group by from the Group By dropdown list. For example, to group results by Settlement Date, click **Settlement Date**.



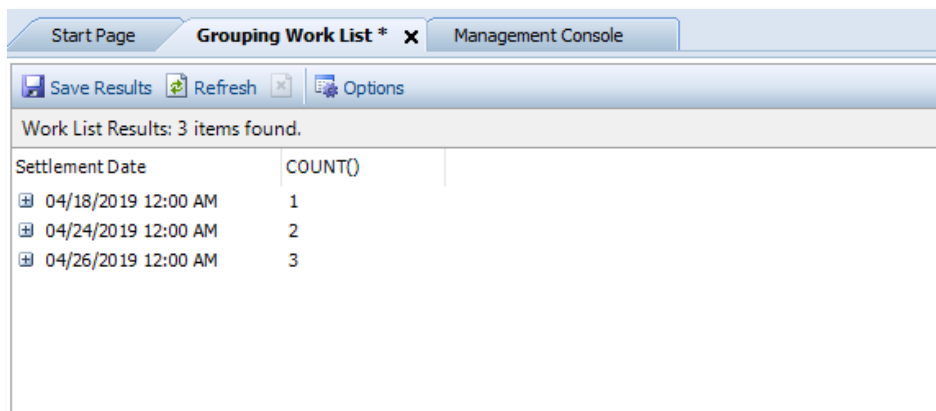
- For a date grouping, you can group by distinct dates or by a date range. In this example, the results will group each date separately.



- 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:



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

The screenshot shows the ProForm software interface. The top navigation bar includes tabs for ProForm, ProTrust, ProDesign, Pro1099, SPImage, SPAdmin, and 360. Below this is a toolbar with icons for New Order, Order Search, Reports, New Group Deposit, Transfer Ledgers, Check Renumbering, Manager, Exceptions, Publish, and Website. The main window displays the 'Grouping Work List' with three groups of orders, each expanded to show details for a specific settlement date.

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

Orders

Number	Settlement Date	Address	City	Zip	Buyer	Seller	Lender	Escrow Officer
2019040005	04/18/2019 12:00 AM	5 Main Street	Raleigh	27609	Barbara Buyer	Sammy Seller an...	Loans R Us	Kathy Closer
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
2019040001	04/26/2019 12:00 AM	1235 Any Street	Raleigh	27609	Betty Borrower	Sammy Seller an...	Loans R Us	Connie Closer
2019040004	04/26/2019 12:00 AM	1237 Any Street	Raleigh	27609	Bob Buyer	Sammy Seller an...	Loans R Us	Emily Escrow
2019040006	04/26/2019 12:00 AM	50 Main Street	Raleigh	27609	Rose Test	Sue Selling and ...	Loans R Us	Connie Closer

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

The screenshot shows the 'Query Options' dialog box with the 'Grouping' tab selected. It displays two groups defined for the query, each with a 'Group By' field, a 'Type' dropdown, an 'As' field, a 'Width' value, and an 'Aggregates' field.

Query Options

Results | Sorting | **Grouping** | Advanced

This is a beta feature. We'd love to hear your [feedback!](#)

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

OK Cancel Apply

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

The screenshot shows the 'Grouping Work List' window with the 'Refresh' button clicked. The results are grouped by Settlement Date, and each date group is further grouped by Escrow Officer. The data is as follows:

Settlement Date	Escrow Officer	Count
04/18/2019 12:00 AM	Kathy Closer	1
04/24/2019 12:00 AM	Emily Escrow	1
04/24/2019 12:00 AM	Connie Closer	1
04/26/2019 12:00 AM	Connie Closer	2
04/26/2019 12:00 AM	Emily Escrow	1

The 'Orders' section for 04/24/2019 12:00 AM shows the following details:

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 'Query Options' dialog box is shown with the 'Grouping' tab selected. A red arrow points to the arrow icon in the 'Add Group' section, which is used to reorder the groups. The current grouping is as follows:

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

The dialog box also includes a message: 'This is a beta feature. We'd love to hear your [feedback!](#)' and buttons for 'OK', 'Cancel', and 'Apply'.

Start Page **Grouping Work List *** Management Console

Save Results Refresh Options

Work List Results: 3 items found.

Escrow Officer COUNT()

Kathy Closer 1

Group By Settlement Date

Settlement Date COUNT()

04/18/2019 12:00... 1

Emily Escrow 2

Group By Settlement Date

Settlement Date COUNT()

04/24/2019 12:00... 1

Orders

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

04/26/2019 12:00... 1

Orders

Number	Settlement Date	Address	City	Zip	Buyer	Seller	Lender	Escrow Officer
2019040004	04/26/2019 12:00 AM	1237 Any Street	Raleigh	27609	Bob Buyer	Sammy Seller an...	Loans R Us	Emily Escrow

Connie Closer 3

Provide Feedback to SoftPro

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

Query Options

Results Sorting **Grouping** Advanced

This is a beta feature. We'd love to hear your [feedback!](#)

Add Group

Group By Type As Width

OK Cancel

Untitled - Message (HTML)

File Message Insert Options Format Text Review Tell me what you want to do...

Paste Basic Text Names Include Tags MyAnalytics View Templates

Clipboard

To... betafeedback@softprocorp.com

Subject

Rose Prasek 4800 Falls of Neuse Rd., Suite 800-848-0143 x5324
Sr. Business Analyst 400 E rose.prasek@softprocorp.com
SoftPro Raleigh, NC 27609

- 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

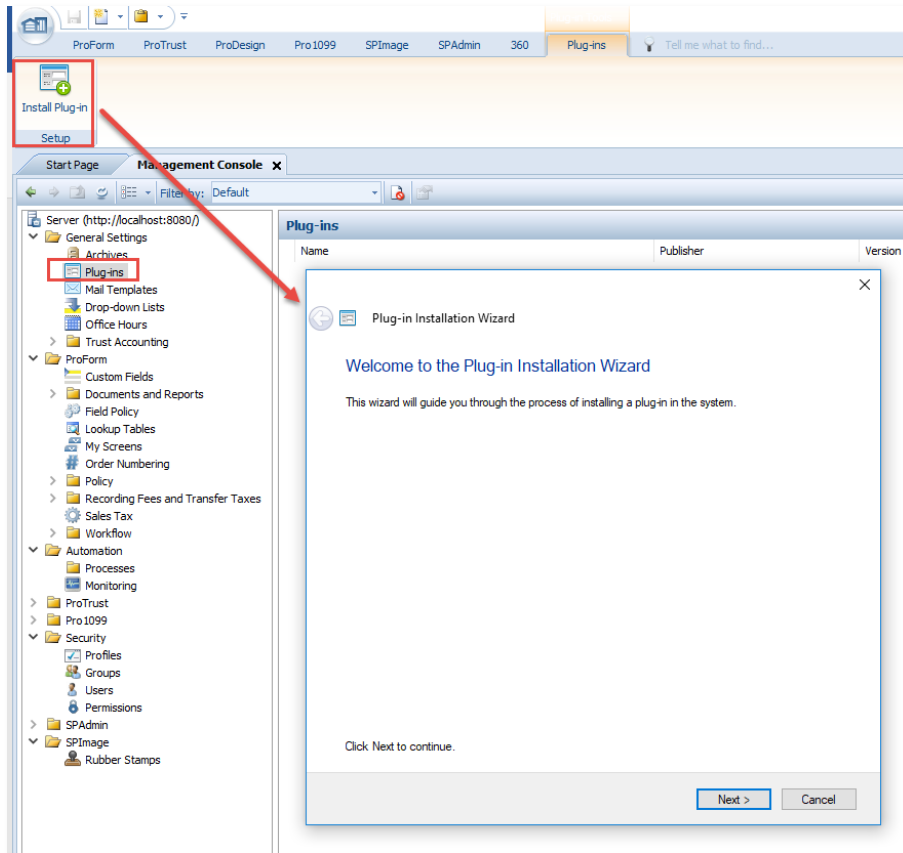
Plug-ins

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:

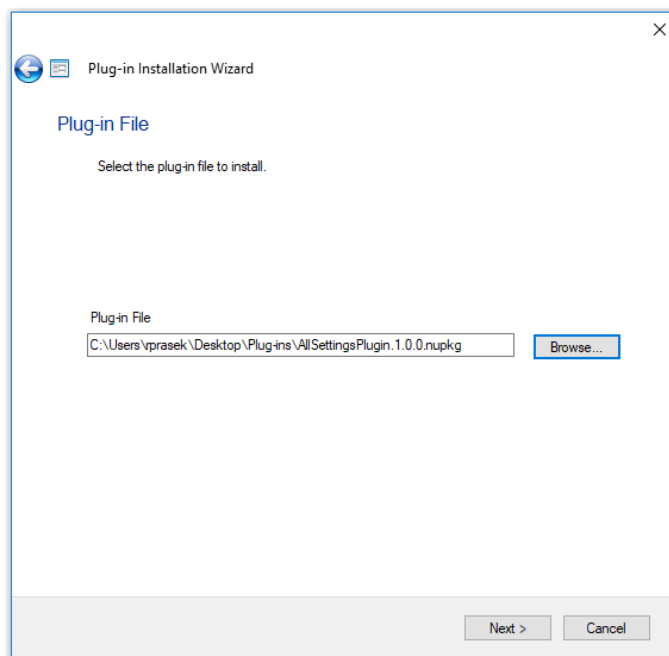
- Added support to specify configuration information in plug-in SDK
- Added an API to associate users and groups with plug-ins
- Plug-ins can be associated with users/groups after installation
- Added the ability to view/add/edit configuration details of plug-ins
- Added the ability to enter license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

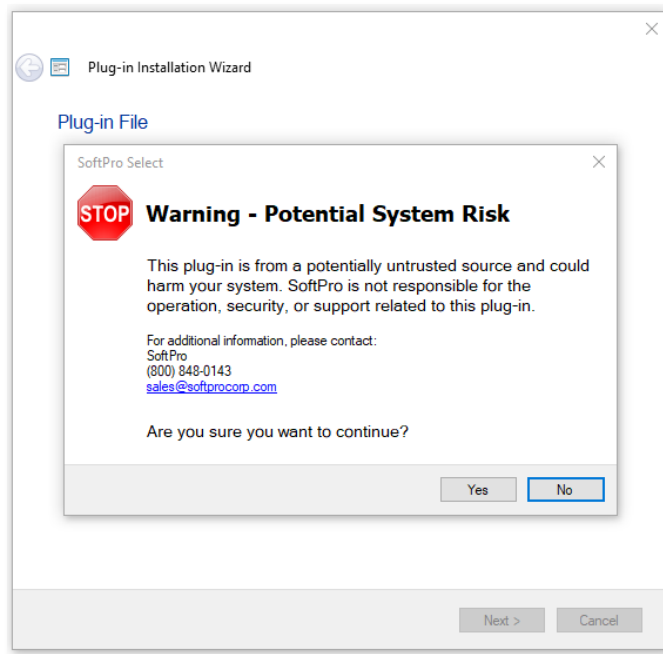
SPAdmin > General Settings > Plug-ins > Install Plug-in



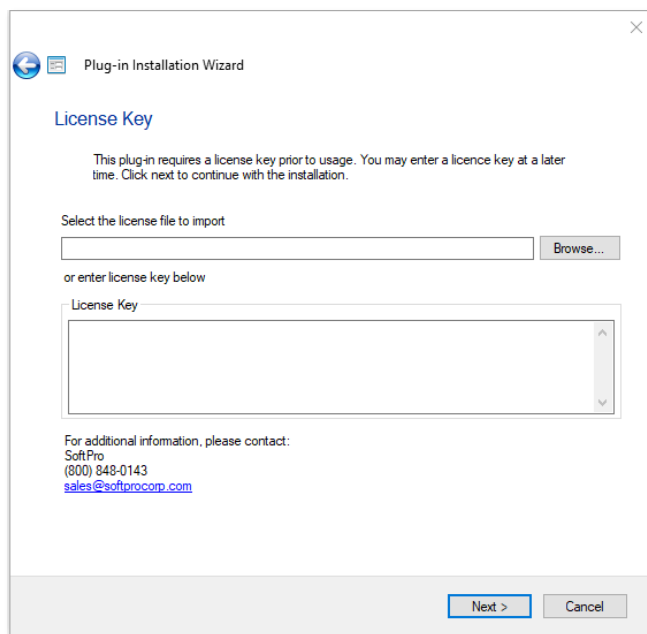
- Click **Browse** to select the plug-in file to install.



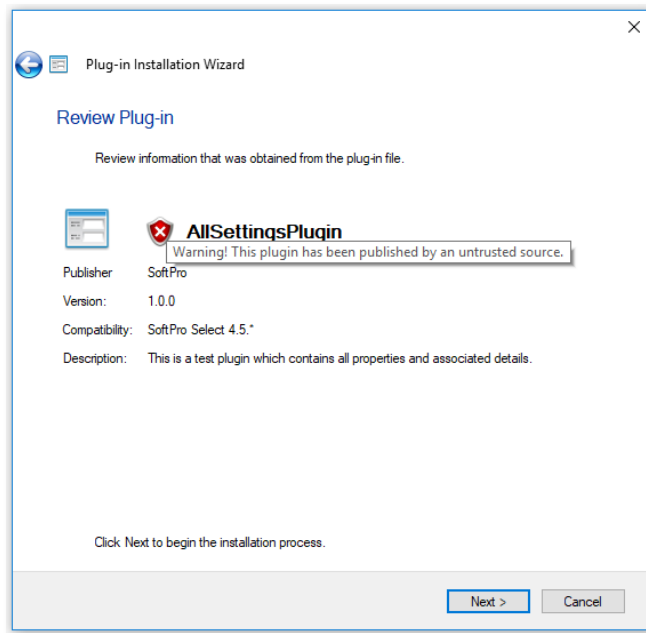
- If the plug-in has not been signed by SoftPro, a Warning will display to the Admin user. To stop the plug-in from installing, click **No**. Click **Yes** to continue installing the plug-in.



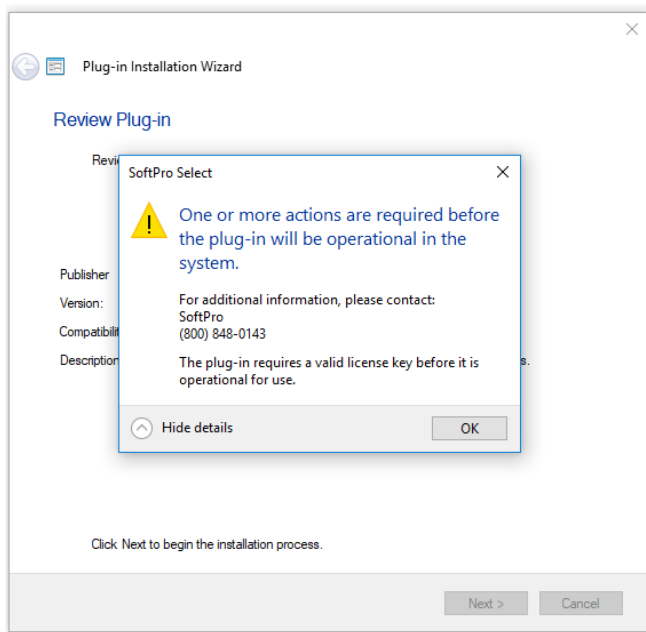
- If the plug-in requires a license key, a License Key screen will display. The license key can be entered either by browsing to the license file or copying and pasting the license key. Plug-ins can still be installed without a license key but will not be enabled until a license key has been entered.



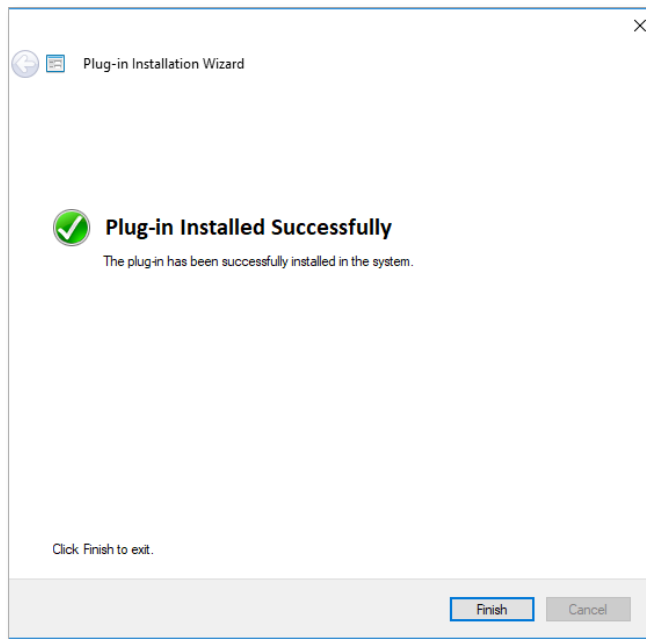
- Prior to installation, a Review of the Plug-in will display. For plug-ins that have not been signed by SoftPro, a warning will display.



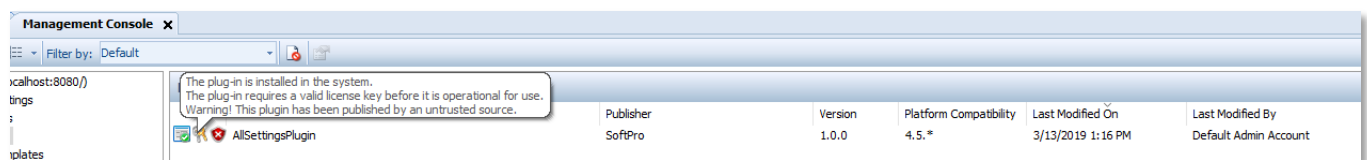
- Click **Next** to begin the installation process.



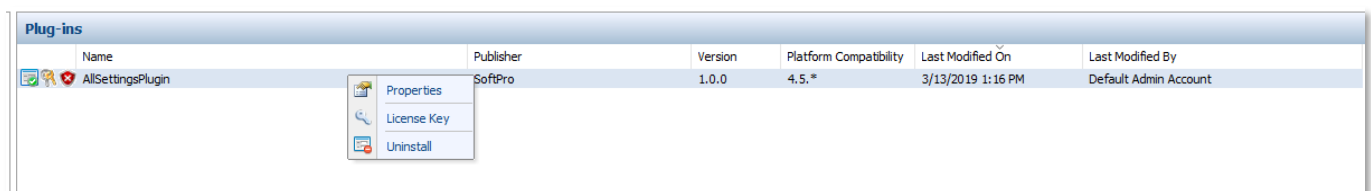
- When the plug-in has been installed successfully, the following screen will display.



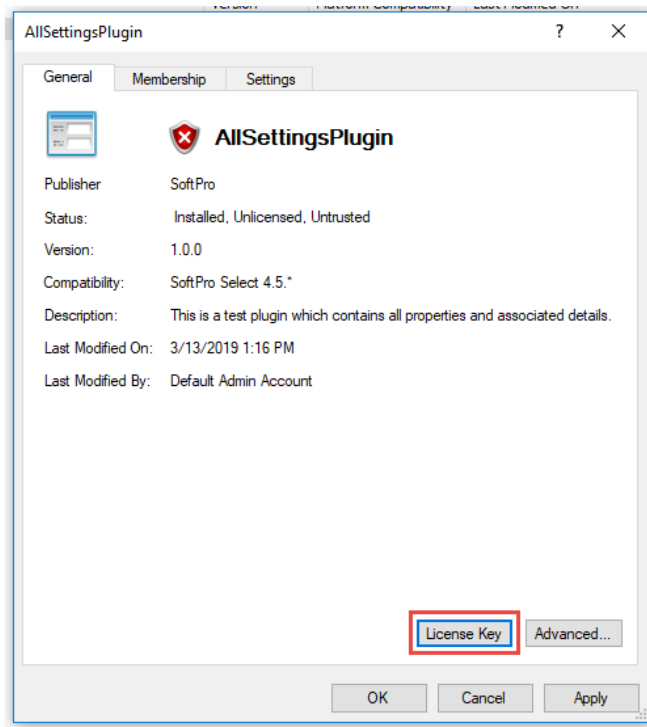
- The management console displays the plug-in information and status icons. Hovering over the icon will display a tooltip showing the status.



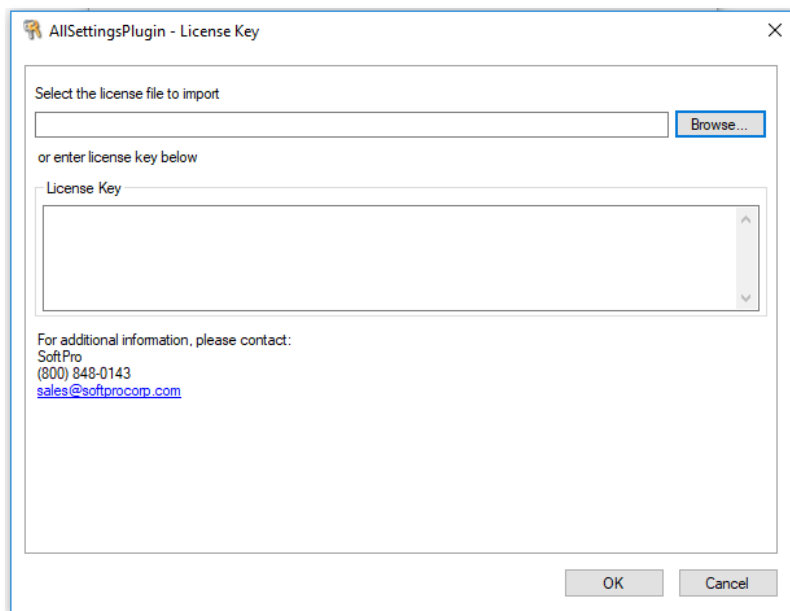
- Access the Properties page by double-clicking the plug-in, or right-click to access the plug-in, enter a license key, or uninstall the plug-in.



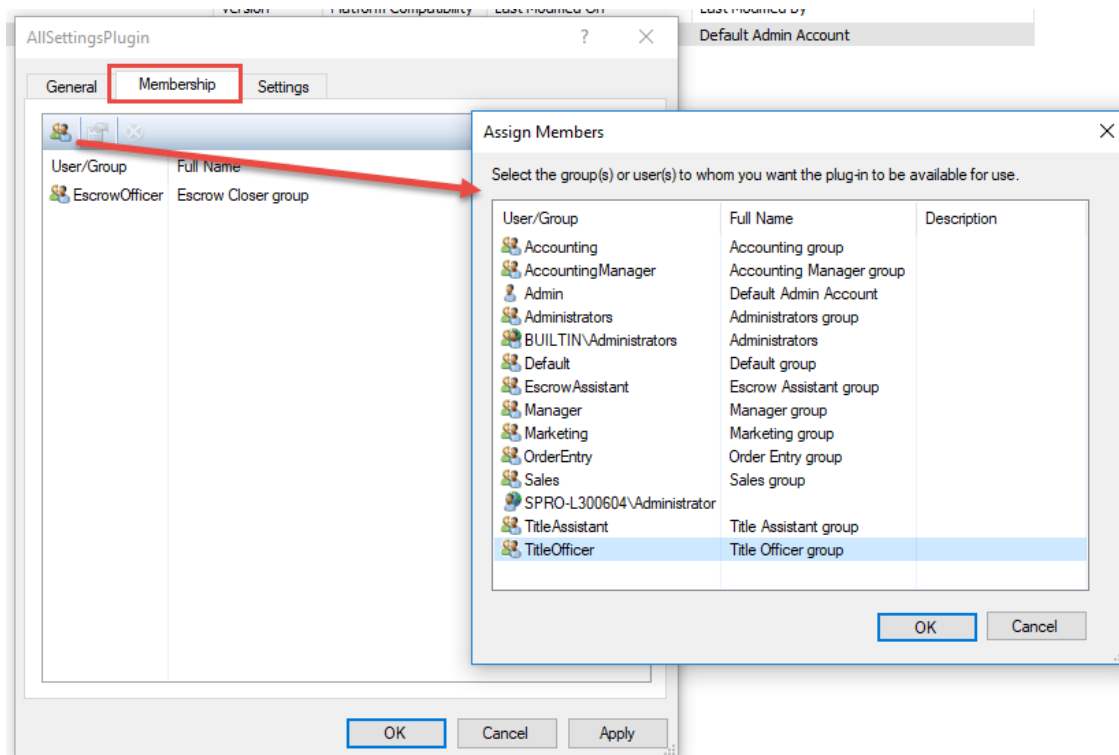
- You can associate members, configure settings (if applicable), or enter a license key from the properties dialog. To enter a license key on an installed plug-in click the **License Key** button.



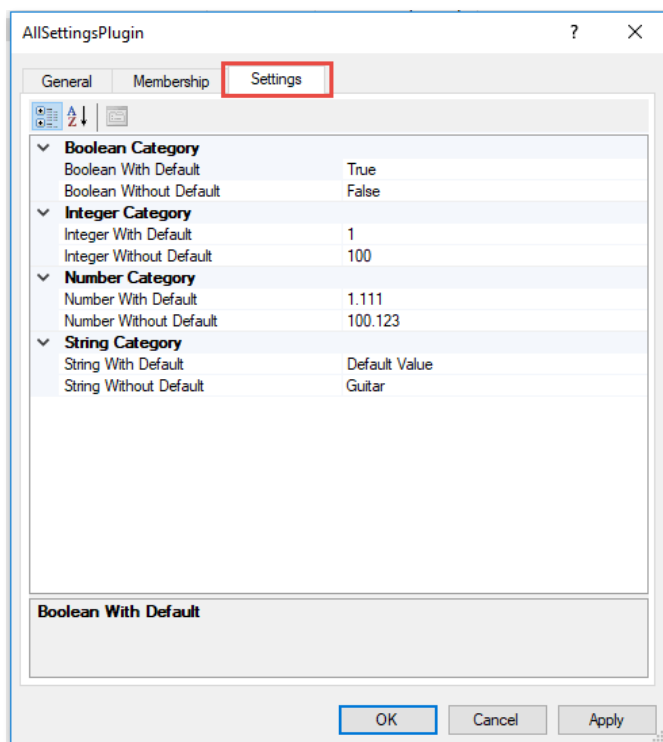
- Enter the license key by browsing to the license file or copying and pasting the license key.



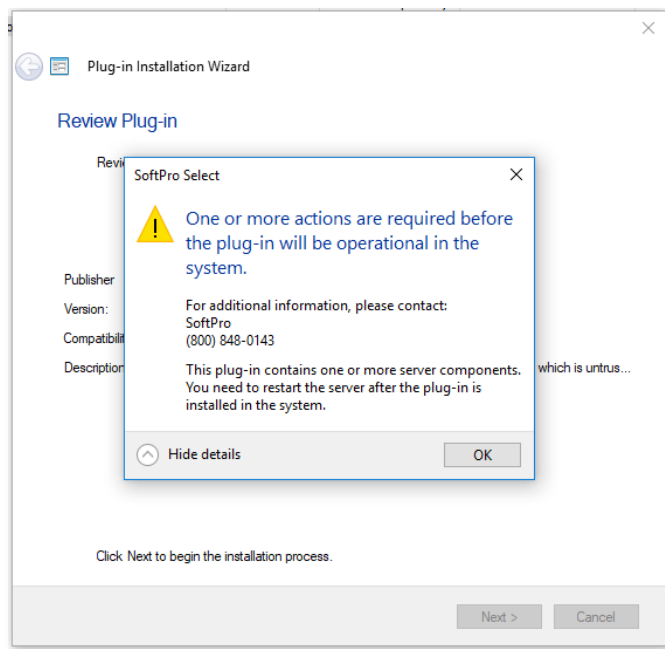
- To associate users/groups with a shell package plug-in, click on the **Membership** tab. If the plug-in license requirements are satisfied but no User/Group is added, the plug-in will not be available to any users. When User/Group is added or removed they will be added or removed when the client is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



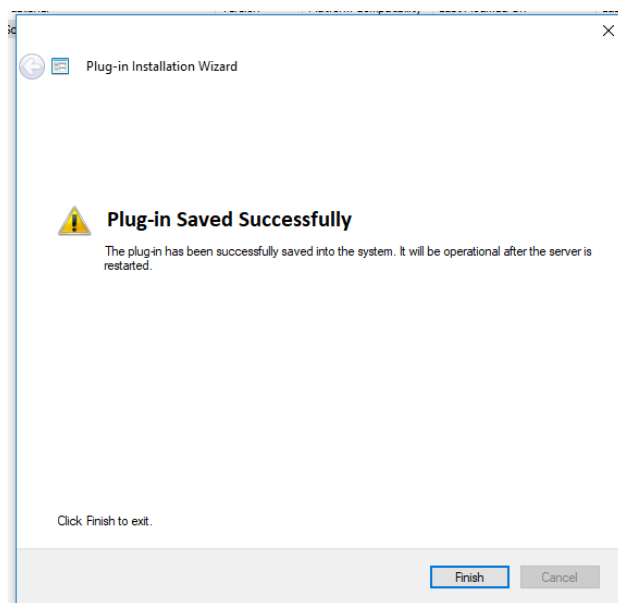
- If the plug-in has configuration settings, a **Settings** tab will display. Click on the tab to select the settings.



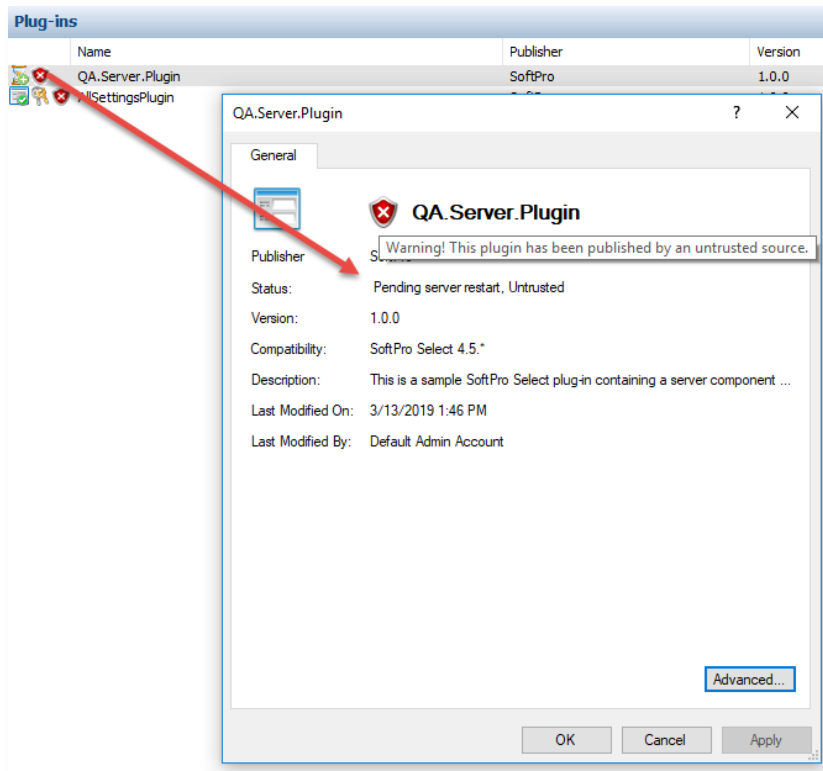
- When installing a plug-in that contains one or more server components, a warning message will display prior to installation.



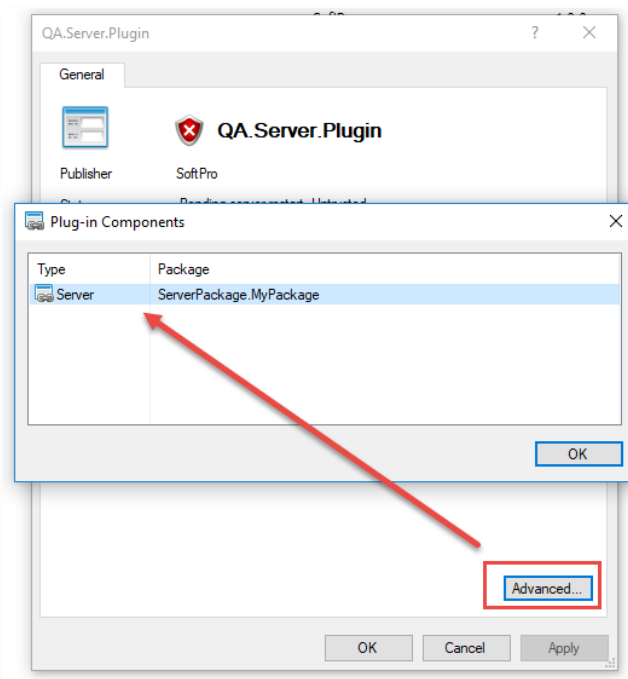
- After installation, the following dialog will open.



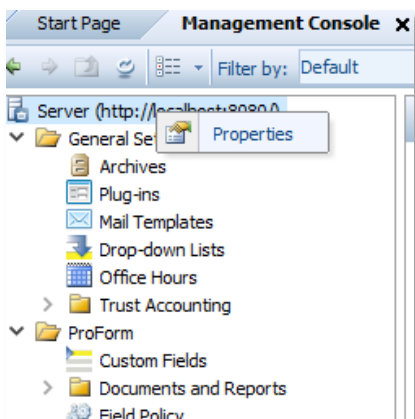
- The properties dialog for a plug-in that contains a server component will show a Status of 'Pending server restart' and if the plug-in was not signed by SoftPro it will also show 'Untrusted'. A plug-in can contain shell and server components, and will need to be restarted whenever there is a server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



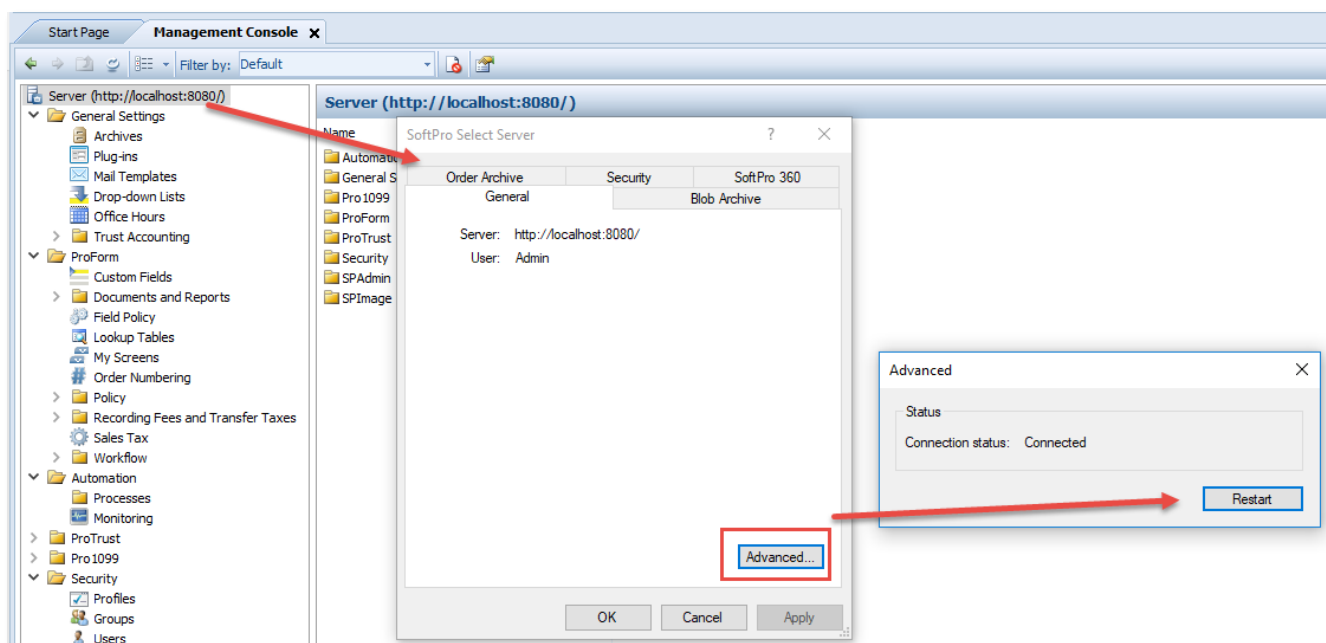
- Click the **Advanced** button to view details regarding the plug-in.



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



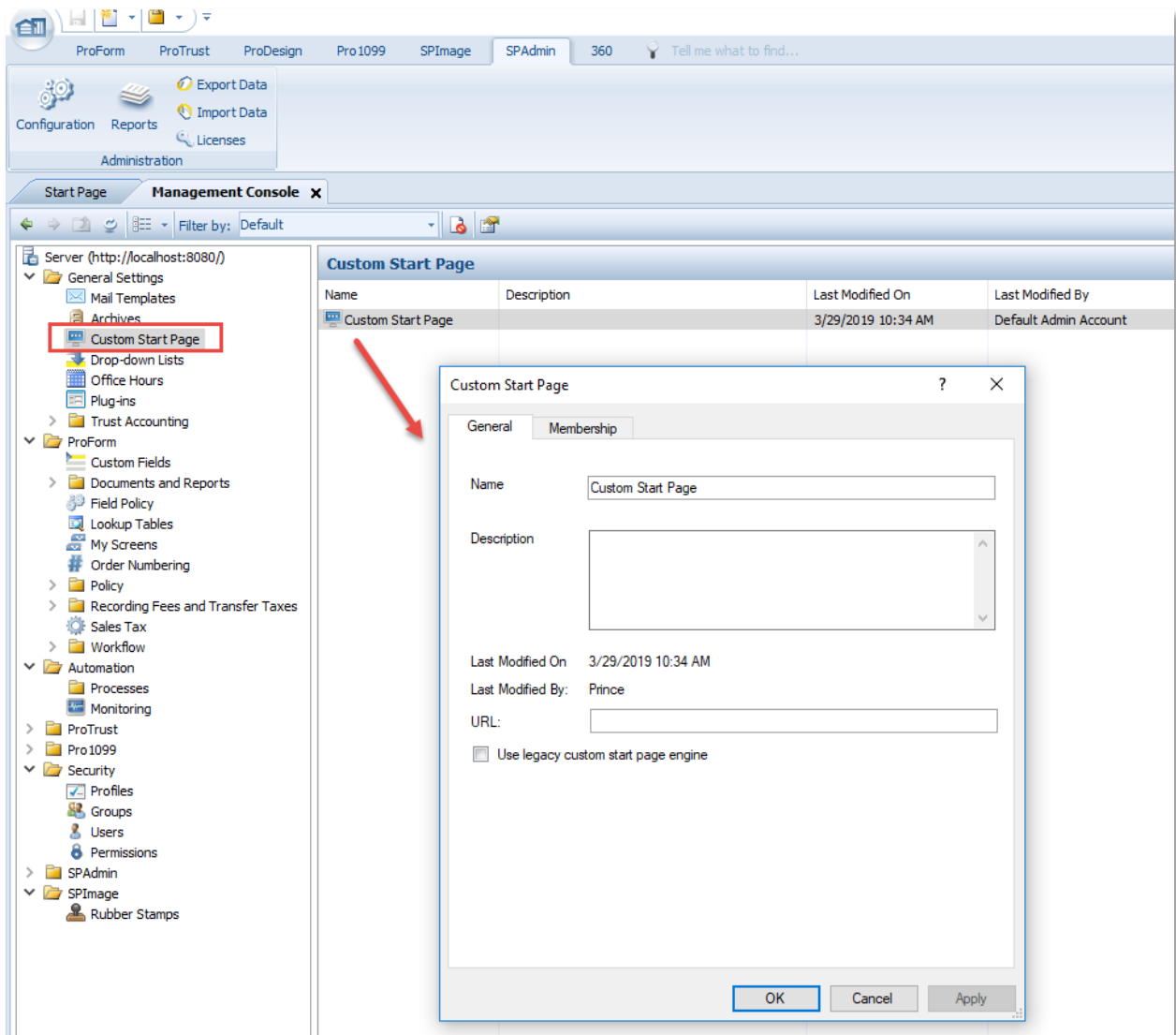
- On the General tab, click the **Advanced** button to restart the server. Once the server has been restarted, the plug-in will be available.



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.

Custom Start Page

General Membership

Name: Custom Start Page

Description:

Last Modified On: 3/29/2019 10:34 AM

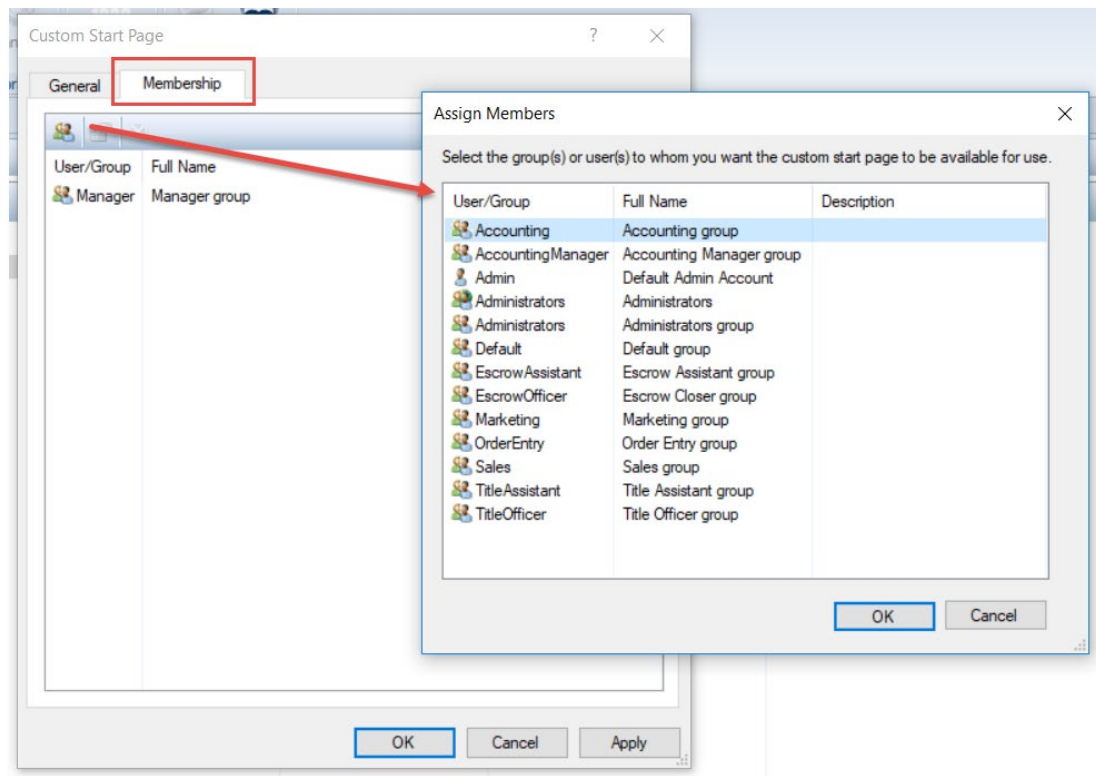
Last Modified By: Admin

URL:

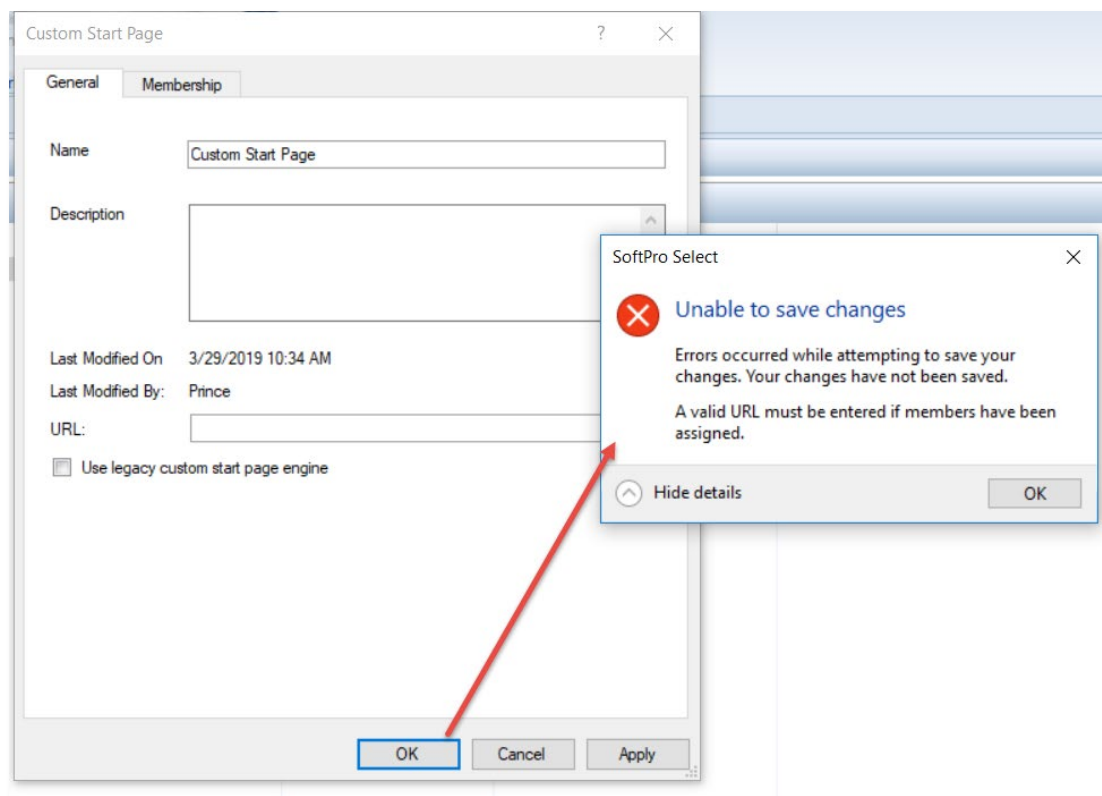
☐ Use legacy custom start page engine

OK Cancel Apply

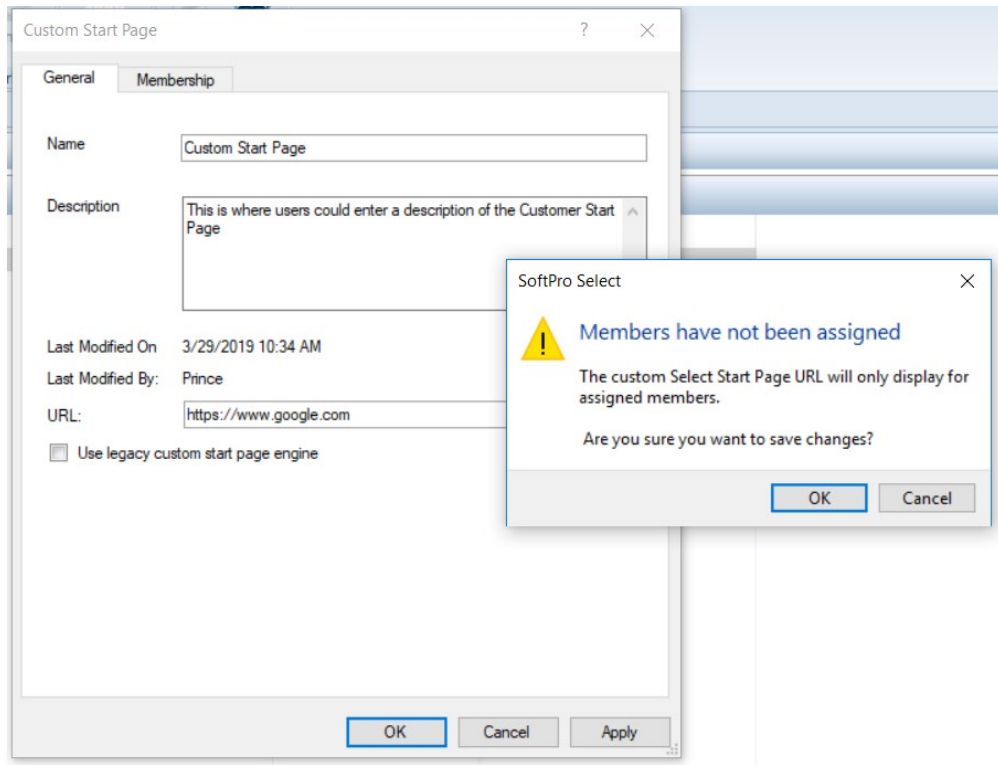
- When a custom URL is entered, only users/groups that have been assigned on the Membership tab will see the custom start page.



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

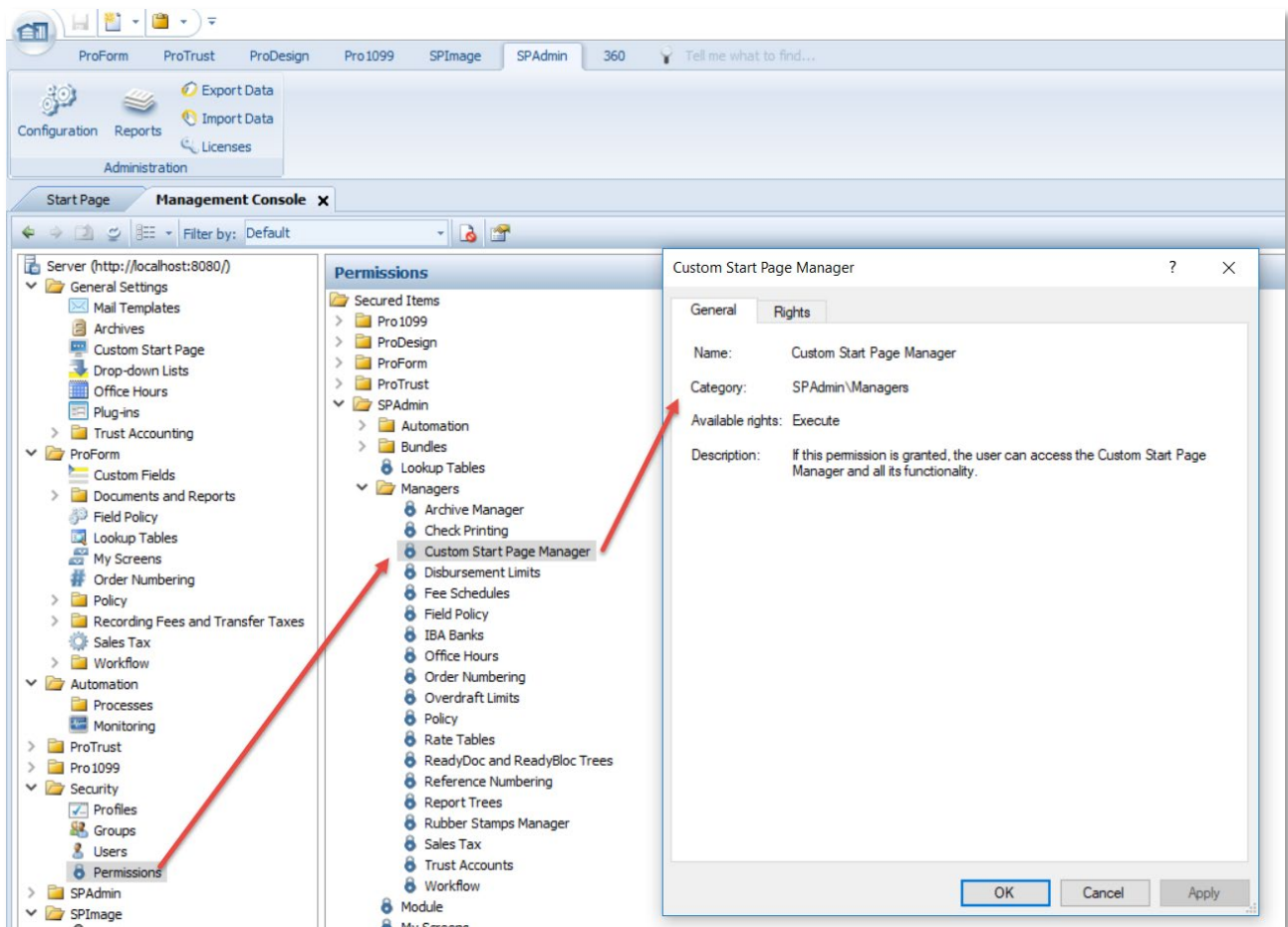


- If a URL is entered but no members have been assigned, the user will see the following warning. The information could still be saved, however the custom start page will not display until members are assigned. Once members are assigned, only the members assigned will see the custom start page. All other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

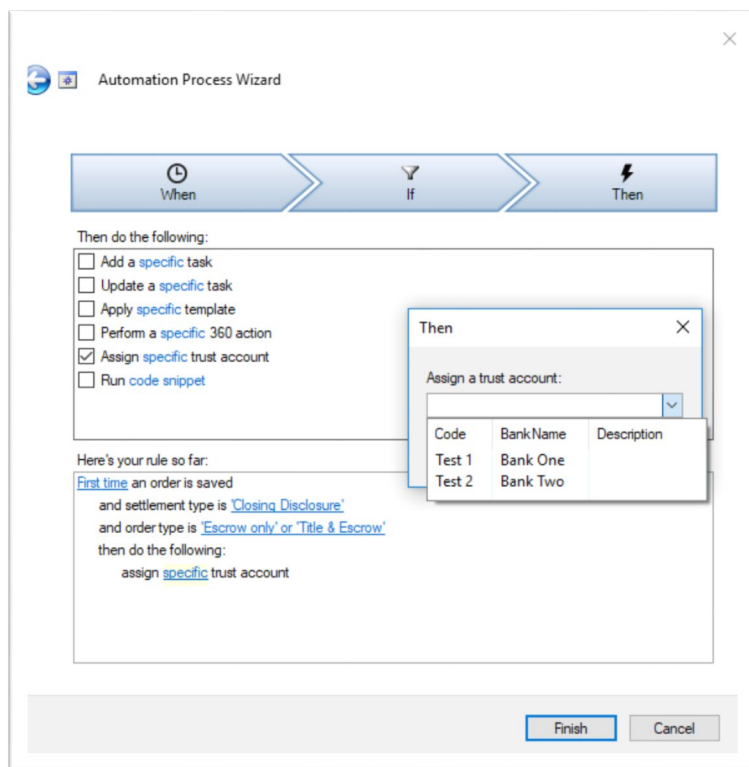
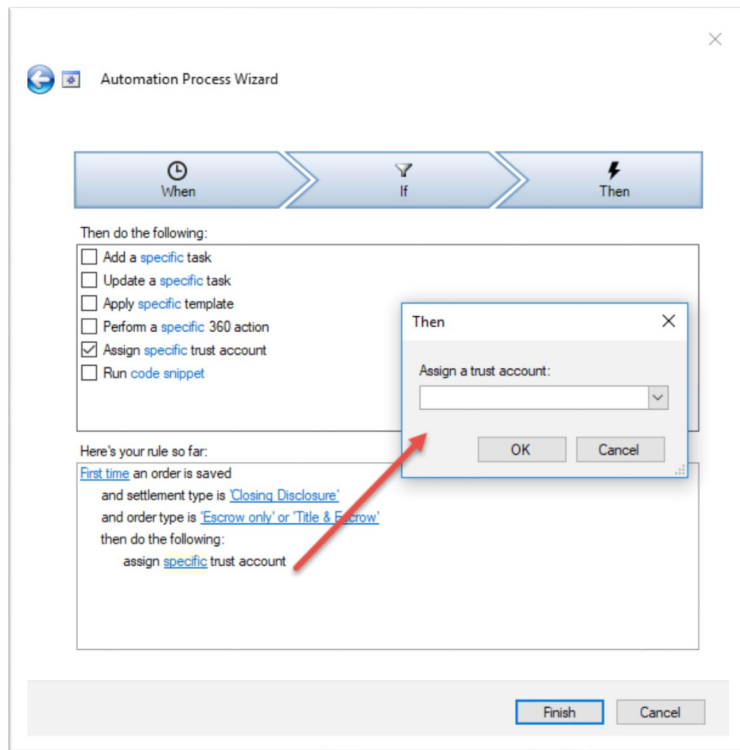
Work Automation

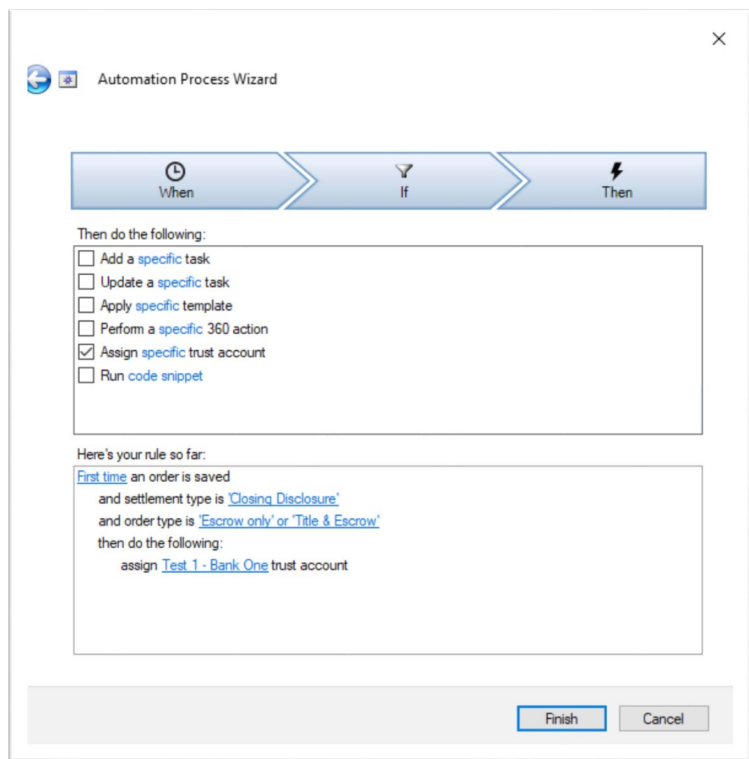
New enhancements have been added to the Automation features:

- 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.





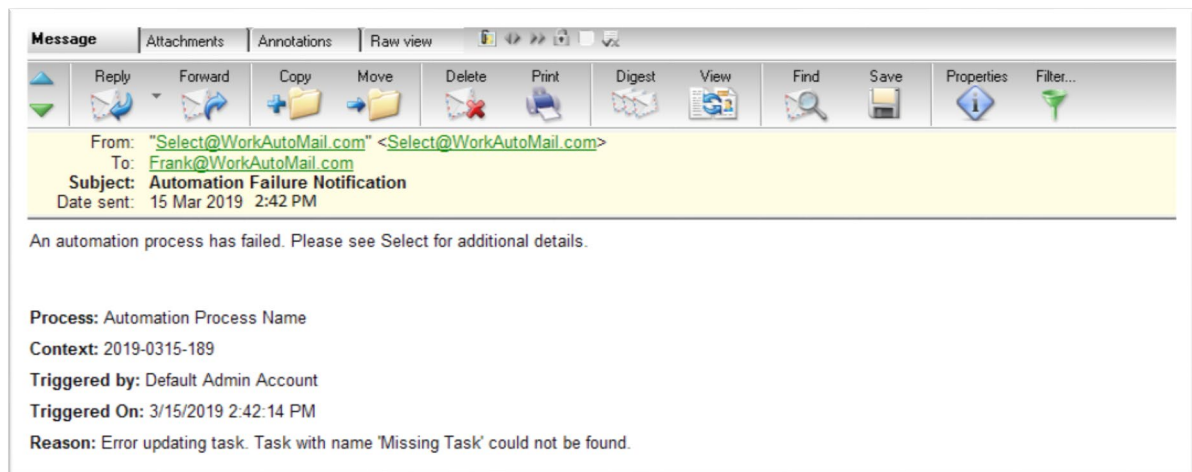
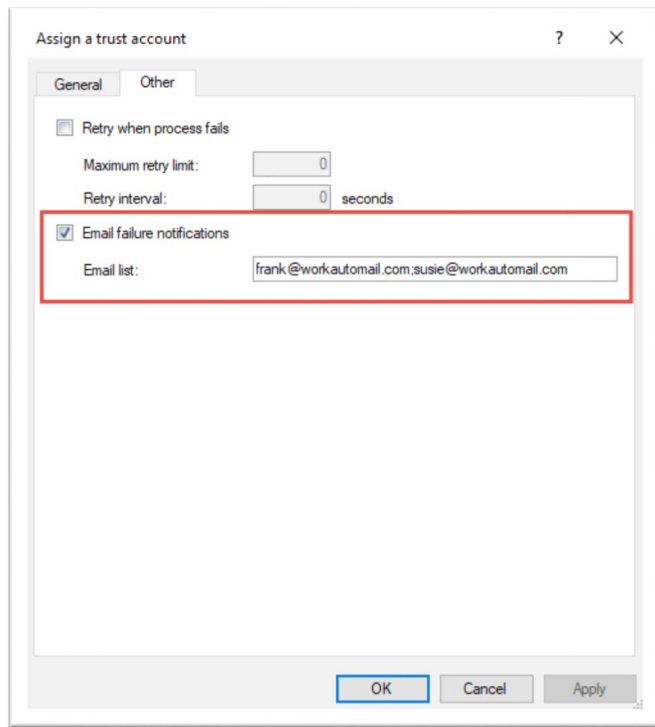
- If a trust account already exists in the order, the process will fail and the error message will indicate the reason: “A trust account has already been assigned to this order.”

Monitoring						
Filter						
Status	Process	Context	Triggered By	Triggered On	Category	Reason
Failed	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.

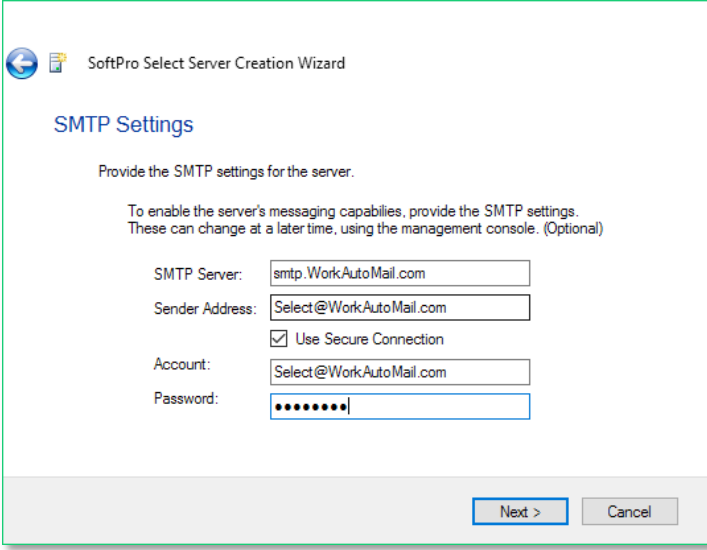
Email Notification when an Automation Process Fails

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 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 capabilities, provide the SMTP settings. These can change at a later time, using the management console. (Optional)

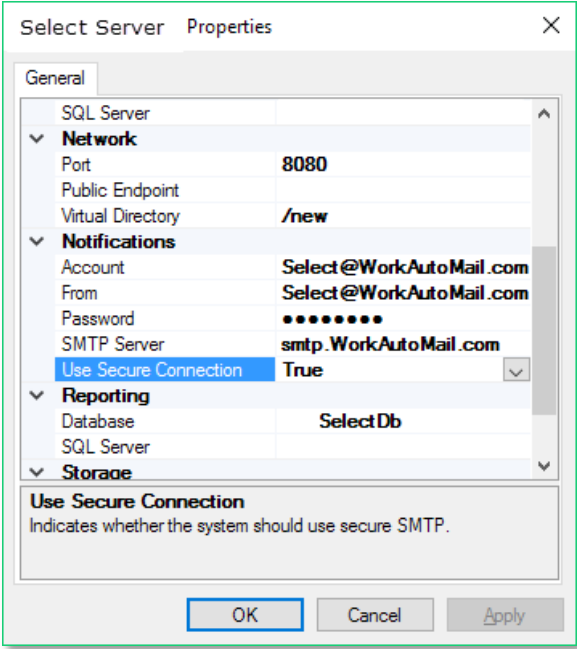
SMTP Server:

Sender Address:

☒ Use Secure Connection

Account:

Password:



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.

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

- Any negative title charges that are sent to a HUD or CDF charge line will now also show the correct payor grid split amounts. For example, if an endorsement of -\$100.00 had a 60%/40% split between an agent and underwriter, the payor grid will now reflect separate rows to the correct split payors for \$60.00 and \$40.00. 10327

C. Services Borrower Did Shop For
Charges for Line 01

Description	Re	To	Borrower-Paid At Closing (\$100.00)	Borrower-Paid Before Closing	Seller-Paid At Closing	Seller-Paid Before Closing	Paid By Others
▶ 1 Title - Endorsement		A					

Details Payors Payees

Code	Name	Amount	POC	Disburse POC	For	Process As	Bill Code
▶ A	Settlement Services	\$60.00	<input type="checkbox"/>	<input type="checkbox"/>	BA	Reduce Funds	
SA			<input type="checkbox"/>	<input type="checkbox"/>	SA		
U	Best Ever Underwriters	\$40.00	<input type="checkbox"/>	<input type="checkbox"/>	BA	Reduce Funds	

- 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. 556415
- New – ALTA Settlement Statement Signature Page with combined signatures containing the following prompts: 560331
 - Print Buyer/Seller, Buyer Only, Seller Only – Default Buyer/Seller
 - Include Settlement Agent Signature – Default True Seller Signature Page
 - Include Settlement Agent Signature - Default True Buyer Signature Page
 - Include Settlement Agent Signature - Default True
- Users now have the ability to include a QI signature on the HUD-1 Statement when the seller is represented by a Qualified Intermediary. 383605
- The Receipts and Disbursement (Pending and Held) Transaction/Trust Date form will now show the Escrow Status and Order Status for order ledgers. These fields will be suppressed for other ledger types. 570955
- The “Seller’s Certification of Non-Foreign Status Under FIRPTA” document was added to the ReadyDoc tree. 560208
- 1099-S form: Blank lines will now appear under the seller’s name when there is not a forwarding address. A blank line will appear for Tax ID when there is no Tax ID in the order. 567763
- 1099-S form: Updated to use the seller contact signature blocks instead of the signature lines with the names from the proceeds screen. 570045
- W-9 forms were pulling from the Current Address, instead of pulling from the Forwarding Address in versions 4.6.2 and 4.3.15.1; *resolved*. 575625

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.

The screenshot shows a dialog box titled "Master Settlement Statement" with a close button (X) in the top right corner. The dialog contains several fields and checkboxes, each with a red circular callout number indicating a specific enhancement:

- 1** Paper size:* (Dropdown menu showing "Letter")
- 2** Statement format:* (Dropdown menu showing "Seller, Description, Buyer")
- 3** Document status: (Dropdown menu)
- 4** Print signatures on final: (Checkbox)
- 5** Print signatures on estimated: (Checkbox)
- 6** Print settlement agent signature: (Checkbox)
- 7** Print certified copy language: (Checkbox)
- 8** Include policy adjustments (w/ policy details): (Checkbox)
- 9** Policy charges include additional details:* (Dropdown menu showing "Coverage Amount, Version")
- 10** Show individual balances due to/from in totals: (Dropdown menu showing "None")
- 11** Show horizontal lines between charges: (Checked checkbox)

At the bottom left, there is a note: "* Required". At the bottom right, there are "OK" and "Cancel" buttons.

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

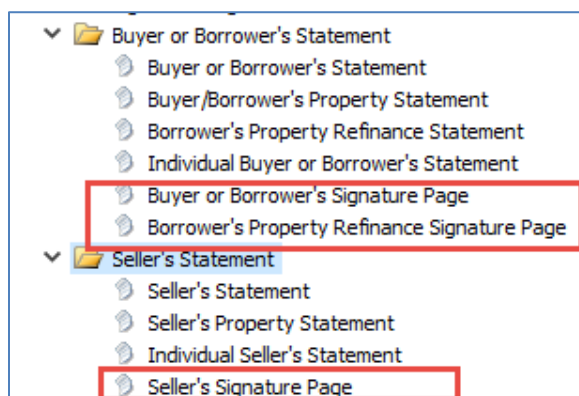
Property:

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.



- 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*
- Property Statements need to have only buyers or sellers that have an interest in the property appear on Property Statements, *resolved*. *587299*
- 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.

Miscellaneous Charges
Charges for Line 01

Description	Re	To	Buyer Debit	Buyer Credit	Seller Debit	Seller Credit
1 Real Estate Commission		LB			\$30,000.00	

Details Payors Payees

1 Real Estate Commission Re: To: LB Name: ReMax

Percent Calculation

2.0000 % of Loan Amount \$1,500,000.00 ☐ Round to nearest whole dollar

Adjustment +/-: For:

☐ POC Buyer/Borrower Debit: Credit: Seller Debit: \$30,000.00 Credit: Seller pay: 100.00 % Bill code:

☐ Taxable

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	
		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	
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Automation

You can now add incoming and outgoing emails to attachments in an order, or save them to a file location.

- The automation wizard has a new trigger, conditions and actions that allow you to add outgoing and incoming emails to attachments in the order.
- A new profile setting, when enabled, appends an email ID to outgoing emails. The email ID is required for any order-based automation processes.

Mail Configuration Settings

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.

The screenshot shows the 'Mail Settings' window of the 'SoftPro Select Server Creation Wizard'. The window has a title bar with a back arrow icon and the text 'SoftPro Select Server Creation Wizard'. Below the title bar is the section header 'Mail Settings'. The main text area contains instructions: 'Provide the Mail settings for the server. To enable the server's messaging capabilities, provide the Mail settings. These can change at a later time, using the management console. (Optional)'. Below this are several input fields and checkboxes: 'Sender Name' (My Company), 'Sender Address' (Select@WorkAutoMail.com), 'SMTP Server' (smtp.WorkAutoMail.com) with 'Port' (465) and a checked 'Use SSL' checkbox, 'Incoming Mail Type' (radio buttons for IMAP and POP3, with IMAP selected), 'Incoming Mail Server' (imap.WorkAutoMail.com) with 'Port' (993) and a checked 'Use SSL' checkbox, 'Account' (Select@WorkAutoMail.com), and 'Password' (masked with dots). At the bottom right are 'Next >' and 'Cancel' buttons.

The screenshot shows the 'SPRO-L300604 Properties' dialog box with the 'General' tab selected. The dialog has a title bar with a close button. The 'General' tab contains a list of properties and their values: 'Public Endpoint' (empty), 'Virtual Directory' (empty), 'Notifications' (expanded section), 'Account' (Select@WorkAutoMail.com), 'From Address' (Select@WorkAutoMail.com), 'From Name' (My Company), 'Incoming Mail Port Number' (993), 'Incoming Mail Server' (imap.Select@WorkAutoMail), 'Incoming Mail Server Type' (IMAP), 'Incoming Mail Use Secure' (True), 'Password' (masked with dots), 'Smtp Port Number' (465), 'SMTP Server' (smtp.WorkAutoMail.com), and 'Use Secure Connection' (True). Below the list is a 'Reporting' section with a 'Notifications' sub-section. At the bottom are 'OK', 'Cancel', and 'Apply' buttons.

Important Note:

- Emails must be received by the configured email address in order to be processed.

Profile Setting and Email ID

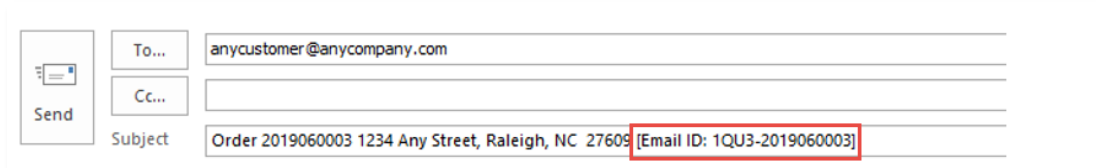
- A new profile setting must be enabled which will append an email ID to outgoing emails.
 - When the **Use Email ID** box is checked, the order will display the Email ID on the Order Information screen for new and existing orders.

The screenshot shows the 'Default' settings window with the 'Order' tab selected. The 'Show' section contains several checkboxes, with 'Use Email ID' checked and highlighted by a red rectangle. Other visible settings include 'Default CDF template', 'Default HUD-1 template', 'Default Commercial template', and 'Default settlement type' set to 'Closing Disclosure'.

- When emailing out of Select, the Email ID will automatically append to the email subject line.

The screenshot shows the 'Order Information' screen. The 'Email subject line' field contains the text 'Order 2019060003 1234 Any Street, Raleigh, NC 27609' followed by '[Email ID: 1QU3-2019060003]' which is highlighted with a red rectangle. Other fields include 'Project name', 'Ownership profile' (set to 'Default'), 'Escrow office', 'Escrow officer/Closer', 'Title office', and 'Title officer/Examiner'.

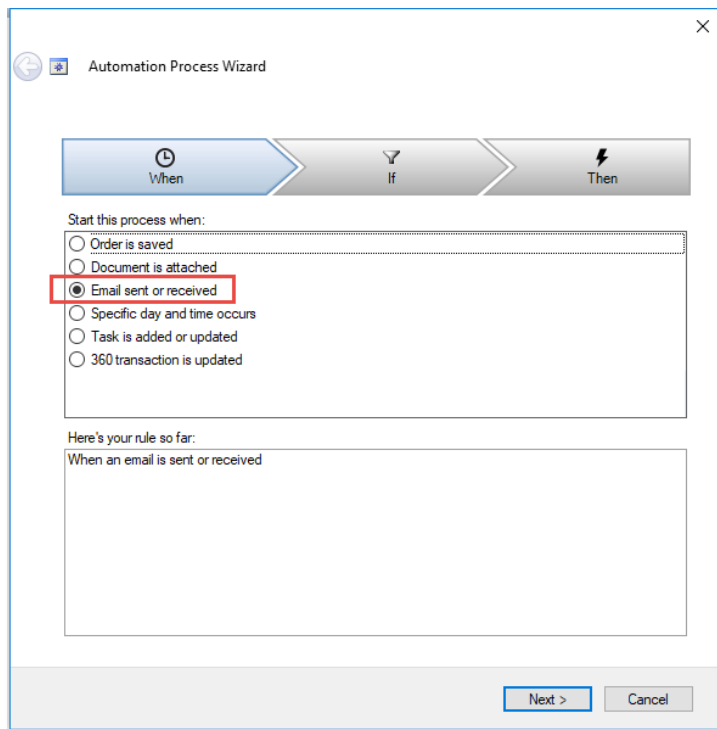
Note: All incoming or outgoing emails MUST include the Email ID in order for order automation processes to work. Emails not originating from Select could still be added to the attachments as long as the Email ID is included in the subject line. The Email ID must also include the **[brackets]**.



The screenshot shows an email composition interface. On the left is a 'Send' button with an envelope icon. To the right are fields for 'To...', 'Cc...', and 'Subject'. The 'To...' field contains 'anycustomer@anycompany.com'. The 'Subject' field contains 'Order 2019060003 1234 Any Street, Raleigh, NC 27609 [Email ID: 1QU3-2019060003]'. The email ID portion is highlighted with a red rectangular box.

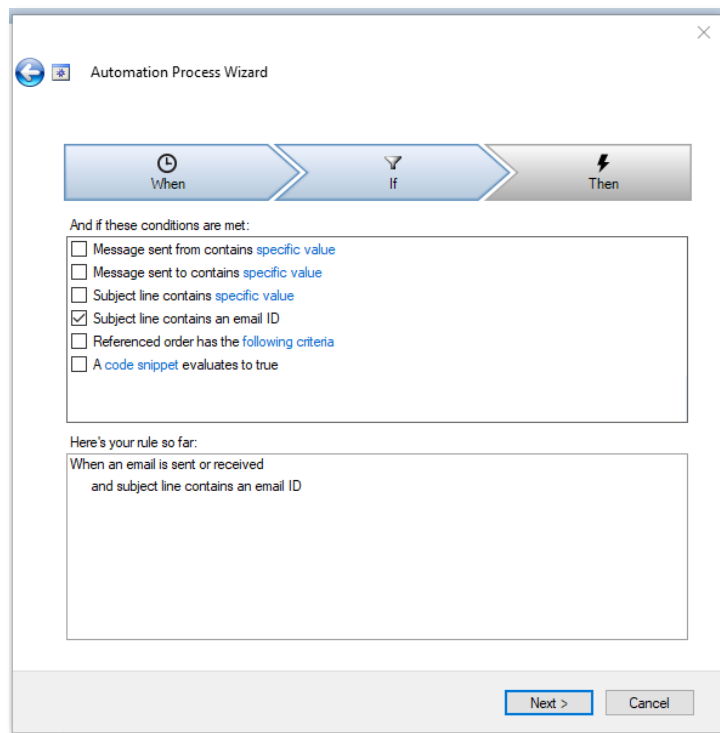
Automation Wizard

- The automation wizard has a new **Email sent or received** trigger.

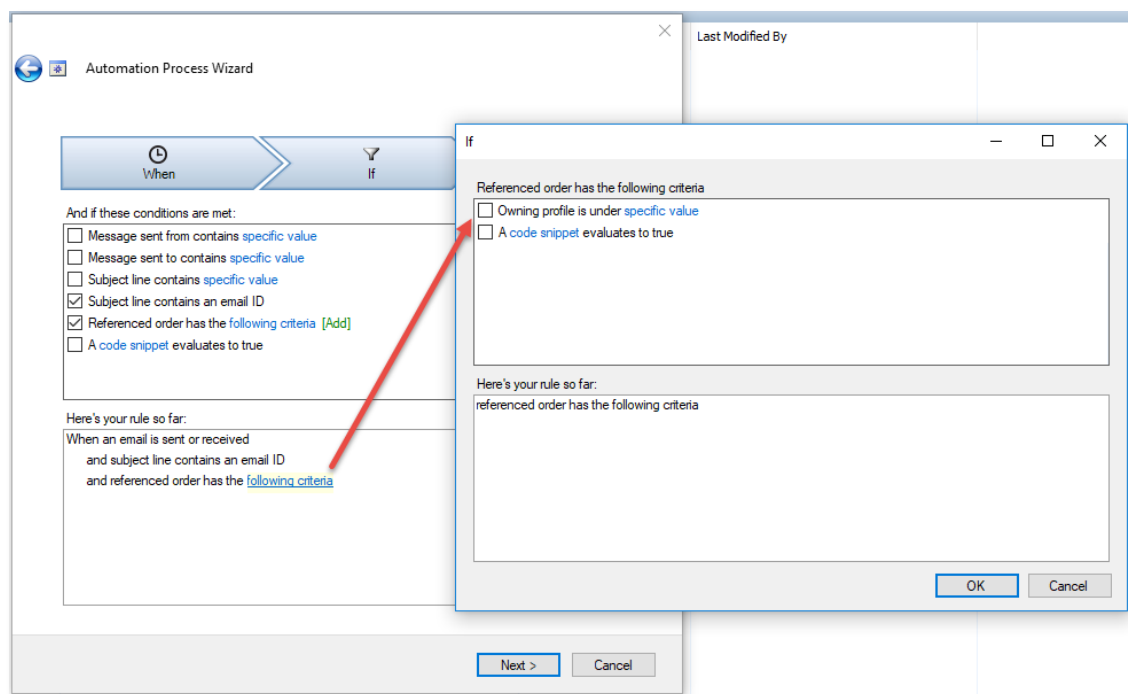


The screenshot shows the 'Automation Process Wizard' dialog box. At the top, there are three steps: 'When' (selected), 'If', and 'Then'. Below the steps, the 'Start this process when:' section contains a list of triggers. The 'Email sent or received' trigger is selected and highlighted with a red rectangular box. Other triggers include 'Order is saved', 'Document is attached', 'Specific day and time occurs', 'Task is added or updated', and '360 transaction is updated'. Below this list, the 'Here's your rule so far:' section shows the text 'When an email is sent or received'. At the bottom right, there are 'Next >' and 'Cancel' buttons.

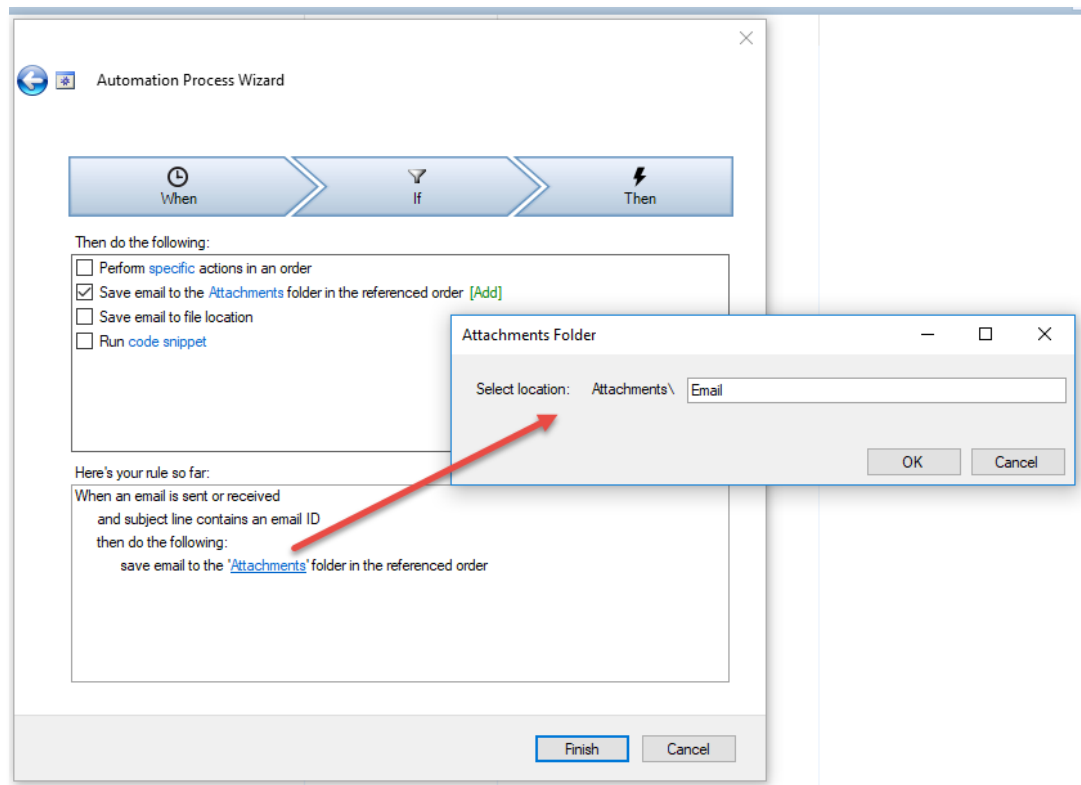
- New conditions have been added that allow you to add conditions to your automation rule.



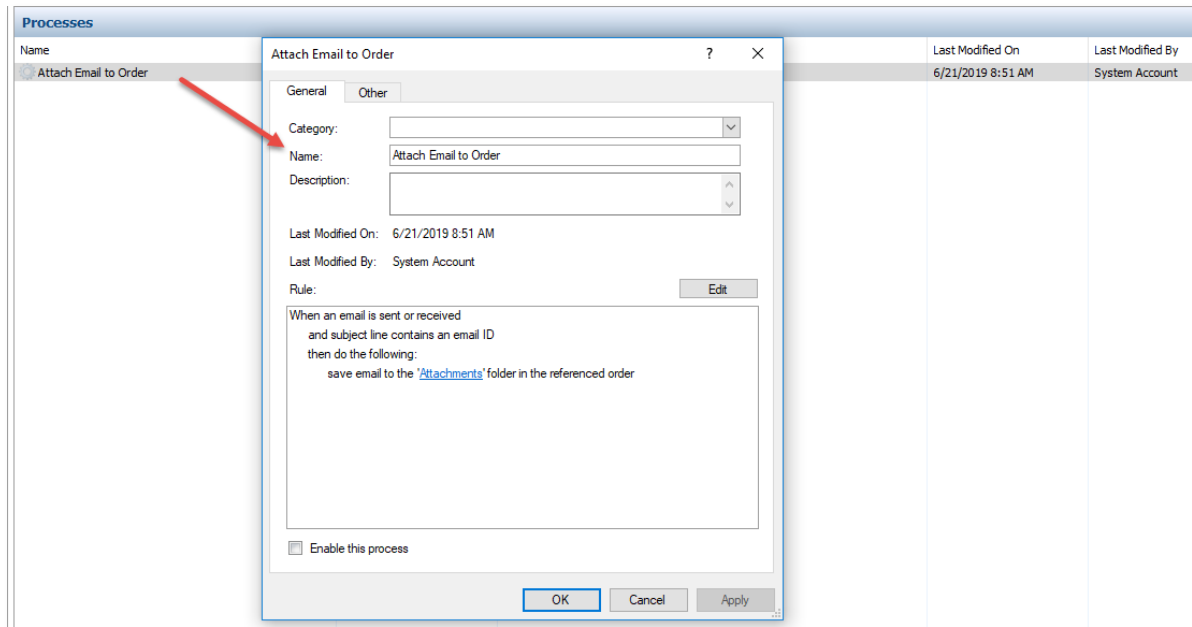
- To have the rule run on a specific profile, you can select the **Referenced order has the following criteria** condition.



- A new action has been added: **Save email to the Attachments folder in the referenced order.**
- Click the **Attachments** hyperlink to add a specific folder location to save the email.
- If a folder is selected but does not exist in the order, the email will still be saved to the main **Attachments** folder.
- You can also save an email to a shared file location by selecting the **Save email to file location.**
- The **Perform specific actions in an order** action is also available.



- An **Attach Email to Order Default** process will be created for your convenience during the install or upgrade process. The process will need to be enabled and email configuration must be completed prior to use. This process can be modified as needed.



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*