



# SoftPro Standard & Enterprise v31.9 (31.9.18556.1)

---

Release Notes | November 18, 2020

4800 Falls of Neuse Road, Suite 400 | Raleigh, NC 27609  
p (800) 848-0143 | f (919) 755-8350 | [www.softprocorp.com](http://www.softprocorp.com)

# Copyright and Licensing Information

Copyright © 1987–2020 by SoftPro, Raleigh, North Carolina.

No part of this publication may be reproduced in any form without prior written permission of SoftPro. For additional information, contact SoftPro, 4800 Falls of Neuse Road, Raleigh, NC 27609, or contact your authorized dealer.

Microsoft, Windows, and MS–DOS are registered trademarks of Microsoft Corporation in the United States and/or other countries. WordPerfect is a registered trademark of Corel Corporation. Crystal Reports is a registered trademark of SAP AG. HP LaserJet is a registered trademark of Hewlett Packard Development Company, L.P. GreatDocs is a registered trademark of Harland Financial Solutions Incorporated. RealEC Technologies, Inc. is majority owned by Lender Processing Services. All other brand and product names are trademarks or registered trademarks of their respective companies.

## IMPORTANT NOTICE – READ CAREFULLY

Use of this software and related materials is provided under the terms of the SoftPro Software License Agreement. By accepting the License, you acknowledge that the materials and programs furnished are the exclusive property of SoftPro. You do not become the owner of the program, but have the right to use it only as outlined in the SoftPro Software License Agreement.

All SoftPro software products are designed to ASSIST in maintaining data and/or producing documents and reports based upon information provided by the user and logic, rules, and principles that are incorporated within the program(s). Accordingly, the documents and/or reports produced may or may not be valid, adequate, or sufficient under various circumstances at the time of production. UNDER NO CIRCUMSTANCES SHOULD ANY DOCUMENTS AND/OR REPORTS PRODUCED BE USED FOR ANY PURPOSE UNTIL THEY HAVE BEEN REVIEWED FOR VALIDITY, ADEQUACY AND SUFFICIENCY, AND REVISED WHERE APPROPRIATE, BY A COMPETENT PROFESSIONAL.

# Table of Contents

|                                |           |
|--------------------------------|-----------|
| <b>(31.3) 12/5/2018 .....</b>  | <b>4</b>  |
| ProForm.....                   | 4         |
| Documents .....                | 6         |
| ProTrust.....                  | 7         |
| SPAdmin .....                  | 8         |
| <b>(31.4) 12/14/2018 .....</b> | <b>9</b>  |
| ProForm.....                   | 9         |
| <b>(31.5) 5/14/2019 .....</b>  | <b>10</b> |
| ProForm.....                   | 10        |
| <b>(31.6) 5/31/2019 .....</b>  | <b>11</b> |
| Installation.....              | 11        |
| <b>(31.7) 7/10/2019 .....</b>  | <b>12</b> |
| ProForm.....                   | 12        |
| <b>(31.8) 1/29/2020 .....</b>  | <b>13</b> |
| Documents .....                | 13        |
| Installation.....              | 13        |
| <b>(31.9) 11/18/2020 .....</b> | <b>14</b> |
| ProForm.....                   | 14        |
| 360.....                       | 14        |
| Pro1099.....                   | 14        |

# (31.3) 12/5/2018

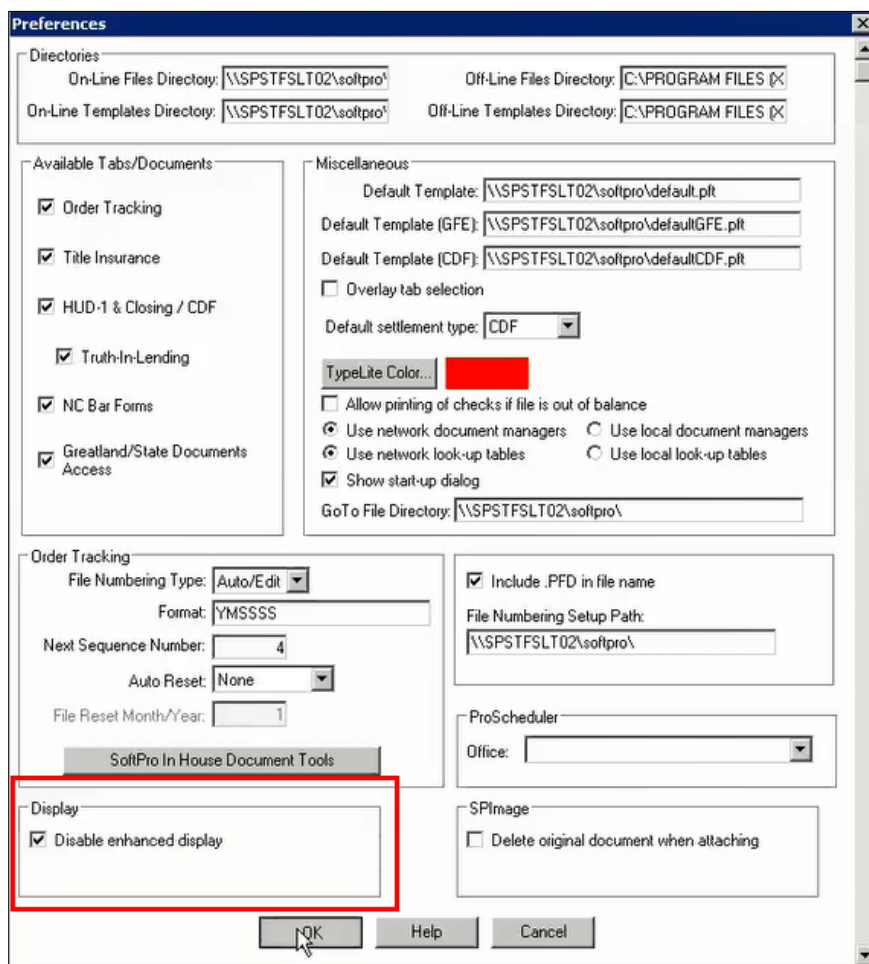
## ProForm

- With the new enhanced user interface, some ProForm screens were slow to respond when using Windows 10 (1709, 1803) and Windows 7. 455637

To resolve this, we have added a preference under **ProForm > Preferences > Display**.

- Check the **Disable enhanced display** checkbox and click **OK**.
- Close the application and when you reopen, the user interface enhancements will be turned off.

**Note:** Disabling the enhanced display will only change the preference for the individual user.



## General

- Modifications to the signature lines and flow text fields were not saving; for example, when adding hard returns to the Signature lines, the field would return to its default state; *resolved*.

410142

- When a date is manually entered into the system as a 2-digit year greater than or equal to 2025, e.g., entering 26 for 2026, when converting to a 4-digit year, the system would restore the date to 1925. This occurred with dates entered in the Lookup tables and Notary expiration dates; *resolved*.

414034

## CDF Page 2

- When sending a fee from additional title charges (title fees, HOA fees and commissions), upon changing the charge to a Flex Check, the “Pay To” name was erroneously being removed; *resolved*.

289854

| C. Services Borrower Did Shop For |                                 |    |    | \$ 50.00         |                            |                                |                          |                              |                |
|-----------------------------------|---------------------------------|----|----|------------------|----------------------------|--------------------------------|--------------------------|------------------------------|----------------|
|                                   | Description                     | Re | DS | To               | Borrower - Paid At Closing | Borrower - Paid Before Closing | Seller - Paid At Closing | Seller - Paid Before Closing | Paid By Others |
| 01                                | Title - ALTA Endorsement For... |    | 3  | Settlement Agent | \$50.00                    |                                |                          |                              |                |
| 02                                |                                 |    |    |                  |                            |                                |                          |                              |                |
| 03                                |                                 |    |    |                  |                            |                                |                          |                              |                |

## Title Insurance

### Prior Policy Information

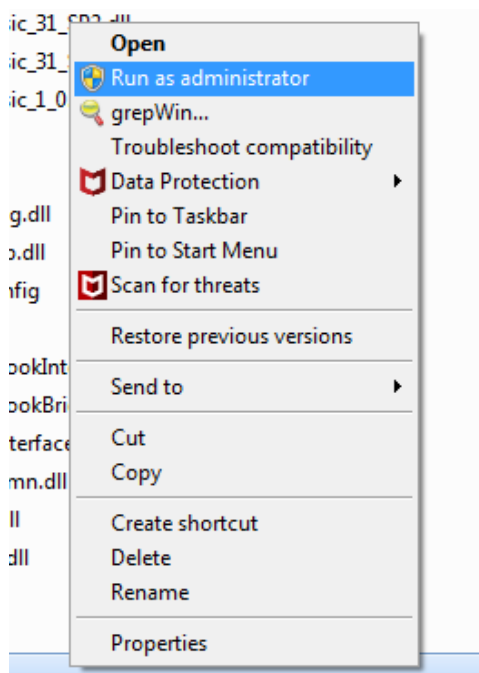
- In cases where the prior policy effective date was within 30 days of the new policy effective date, the discount premium was not calculating properly; *resolved*.

424082

## Documents

### ReadyDocs

- Users were unable to create a DocUpdate initial backup using the DocUpdater Tool, and received an error message, “Access Denied,” with the name of the file. This was occurring when the updater attempted to overwrite a file that was Read-Only; *resolved*. 426619
- Users were experiencing installation errors when attempting to run the DocUpdater Tool when they were not running ProForm as an administrator; resolved. Now, if the user is not logged in to ProForm as an administrator and attempts to run the DocUpdater Tool, they will receive a prompt to close out of ProForm and log back in as an administrator. 465457



- When using the DocUpdater Tool, not all documents were installed; some documents were missing. This was occurring when the user closed ProForm while the tool was installing, and therefore not all files were installed; resolved. Now, if the user attempts to close ProForm while the DocUpdater Tool is running, a message will display that “*ReadyDocs are currently being updated. ProForm cannot be closed until the process is complete.*” 426611
- Upgrading to Windows 10 removed a server component (the Amyuni registry), which resulted in failed Print to PDF errors. This has been resolved with an Amyuni upgrade to version 6.0.0.5. 46670
- Manually created prompts were appearing twice for requirements and exceptions. Users would receive a second prompt when selecting Print Preview a document; *resolved*. 425356

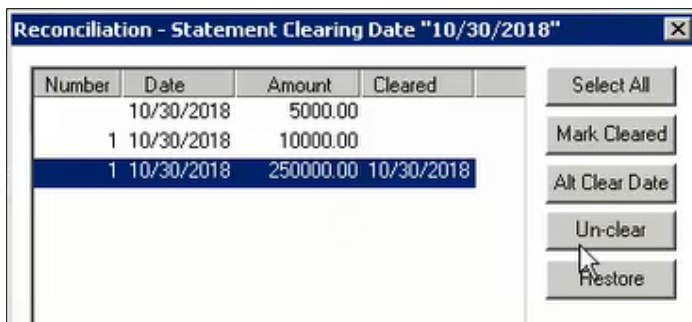
### Word Merge

- Exceptions/Requirements and flow text fields that had a hard return (paragraph indicator) were displaying the hard return as a bulleted or numbered item, but blank line with no text on the Word Merge document; *resolved*. 334400

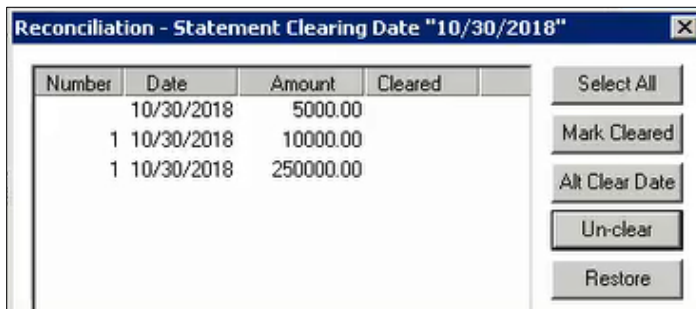
## ProTrust

- When a file that did not contain a settlement date was exported to ProTrust, posted transactions were exporting without a transaction date and could be cleared through Reconciliation; *resolved*. Posted transactions will now export to ProTrust with the **system date** defaulting as the transaction date. 336870
- When selecting to unclear a group deposit in the reconciliation tool, users were unable to unclear a previously cleared group deposit; *resolved*. 399170

When users needed to make a revision to a group deposit that had already been cleared, they would need to first remove the Cleared date.



When unclearing it by using the Un-clear button, it would look like it was cleared:



However, when attempting to save, the system was still holding on to the Clear date, and users were unable to clear the Group Deposit.

This was fixed so that now the Cleared date is removed when clicking on the Un-clear button.

- The Escrow Trial Balance Report was not showing the most recently updated transaction date as the last activity date after a user changed the transaction date; *resolved*. 314699

| Escrow Trial Balance Report ( Balances Only ) - Sorted By File ID |               |  |                                  |              |     |
|---|---------------|--|----------------------------------|--------------|-----|
| Selection Criteria  |               |  | Trust Account Description : TEST |              |     |
| Trust Account: RE   |               |  |                                  |              |     |
| Balances as of: 10/30/18  |               |  |                                  |              |     |
| Ledger Selection: Guaranty Ledgers Only                           |               |  |                                  |              |     |
| Firm File ID  | Trust Account | Client / Matter<br>Ledger Comment / Property | Last Activity<br>Date            | Balance      | RFD |
|   | RE            | buyer  | 10/30/18                         | \$250,000.00 |     |
| Balance:  |               |  |                                  | \$250,000.00 |     |

- In certain scenarios users were receiving an error, "Max users exceeded in ProTrust." This was occurring due to the License continuing to run after closing ProTrust; *resolved*. 454641

## SPAdmin

- For new installations, local Lookups were being set for the administrator who did the installation, rather than for the user; *resolved*. Now local Lookups will be installed for the machine, not the user. 472947



# (31.4) 12/14/2018

## ProForm

---

### General

- The Interim Interest “To” date was not auto-populating when entering data to calculate the Interim Interest for HUD, GFE, and CDF orders in version 21.3; *resolved*. 507420

# (31.5) 5/14/2019

## *ProForm*

---

### **Title Insurance**

- The reissue credit was not calculating correctly when the Discount % field is left blank. This is occurring in the 21.4 release; *resolved*. 539638

# (31.6) 5/31/2019

## *Installation*

---

- Binary versions were getting downgraded during the 21.5/31.5 release, which affected the email documents function, eProRemit, and auto-doc update functionality; *resolved*. 544384

## (31.7) 7/10/2019

### *ProForm*

---

- ProForm was processing more slowly for users on terminal servers on versions 31.4 and above;  
*resolved.* 544915

# (31.8) 1/29/2020

## *Documents*

---

- Requirements & Exceptions were not printing on Schedule B when printing the document to PDF without previewing beforehand; *resolved*. 455949

## *Installation*

---

- Support was added for Windows DQL Server 2017, Windows Server 2019 and Windows SQL Server 2019. 549960, 527838, 532658

# (31.9) 11/18/2020

## ProForm

---

### General

- Functional improvement patches.
- Increased CPU utilization when client application not in use; *resolved*. 44163
- Recently Viewed Items list not populating; *resolved*. 48454
- File exception error received when saving an order; *resolved*. 49910

### Attachments

- Inability to select multiple documents as email attachments; *resolved*. 47161

## 360

---

- Client not installing when setting up a new ProForm client; *resolved* 46618

## Pro1099

---

- Updated for 2020 tax year.