

# CLASS SCHEDULE

## UNIVERSAL for all SoftPro users

### Getting Ready for an Audit Thursday 11:00 AM – 11:50 AM

Audits... "That'll be fun," said no one ever. Audits never come at the best time. Do you find yourself running around trying to pull together all of the information that is required? Let us help you with that. Join us in this session as we walk you through what you can do to be prepared for a less stressful audit season.

### SQL Administration<sup>REC</sup> Thursday 11:00 AM – 11:50 AM

This course provides an in-depth exploration of SQL Server Administration focusing on essential practices for ensuring data integrity, availability, and performance. Participants will learn how to implement effective backup strategies, create maintenance plans, and configure SQL Server for optimal operation. Some experience with SQL Server and server administration is desirable, but even if you are not a technical person and want to learn more about how to keep your operation in tip top shape, join us!

### Reports Roundtable Thursday 1:00 PM – 1:50 PM

SoftPro has extensive reporting capabilities. Join this roundtable discussion to learn how to harness the power of reporting to extract the data you need.

### ClosingsLIVE<sup>REC</sup> Thursday 1:00 PM – 1:50 PM

Get a birds-eye view of how ClosingsLIVE can be utilized to securely track the status of your closings and communicate with contacts from your order. You can now solicit information from contacts through a new fillable forms feature, which will deliver the form along with the data back into your ProForm order. Available on desktop or through a mobile app, ClosingsLIVE keeps the status of your closings at your fingertips!

### ClosingsLIVE Administration Thursday 2:00 PM – 2:50 PM

So, you've got this amazing tool in ClosingsLIVE, but you know there have to be administrative settings to make it even more effective. Join this session to learn key administrative components in ClosingsLIVE such as setting up web order entry and customizing the order form, using Fillable Forms, configuring templates for automation, user management, customizing email templates, and triggering workflow/tasks based on information in the SoftPro 360 queue.

### SoftPro Resources at Your Fingertips<sup>REC</sup> Thursday 4:20 PM – 5:10 PM

Do you ever wonder how to stay "in the know" of what your Real Estate Software has to offer? Come to our session and learn all about the many resources SoftPro provides to our customers. Just a few examples will be: new products, additional training options and industry updates.

### Documents Roundtable Friday 11:00 AM – 11:50 AM

How are other SoftPro users making use of existing documents and customizing them to their needs? Join this roundtable discussion to help take your SoftPro documents to the next level.

### MS Word Merge\*<sup>REC</sup> Thursday 10:00 AM – 10:50 AM

Learn the ins and outs of programming custom MS Word Merge documents. This session includes instruction on document field codes, logic and document trees. You will learn how different types of logic accommodate multiple scenarios. We will also provide an overview of the MS Word Merge and ReadyDoc Managers. **\*PREREQUISITE:** Must have a good understanding of MS Word and a working knowledge of SoftPro Standard or Enterprise editions.

### Template Creation and Management<sup>REC</sup> Thursday 1:00 PM – 1:50 PM

Do you find yourself always changing or adding common information in your ProForm files? Learn how to create and update your templates to save yourself precious typing time and streamline your closing process.

## STANDARD & ENTERPRISE Standard or Enterprise Edition Users

### The Benefits of Using Ledgers in ProTrust<sup>REC</sup> Thursday 2:00 PM – 2:50 PM

Do you currently write a large number of checks to the same vendor from a number of different ProForm files? Were you aware that there is an easy way to save time, money and checks utilizing fee ledgers in ProTrust? Learn how to create, search for, transfer money to, and disburse fee ledgers in ProTrust.

### ReadyDocs Manager<sup>REC</sup> Thursday 3:20 PM – 4:10 PM

This class will teach you how to customize your own User Tree using the ReadyDocs Manager to create folders and add custom folders and documents to the User Tree. You'll also learn how to manipulate folders and documents within the tree, how to add an existing SoftPro document to the User Tree, how to edit and/or delete folders, and how to verify document properties within the tree.

### Tips, Tricks and Shortcuts for Standard & Enterprise<sup>REC</sup> Friday 10:00 AM – 10:50 AM

How familiar are you with utilizing and updating lookup tables? Did you know you can create or modify lookup tables? Were you aware that there are keyboard shortcuts that can help you move through your order without touching your mouse? Are you using the attachments and e-mail features in ProForm? Do you know how to update your ReadyDocs? Learn all this and more to enhance your experience in SoftPro Standard and Enterprise.

## SPUG 2025 CLASS SCHEDULE

### Thursday, April 10

7:30-8:30	Breakfast, Registration & Networking					
8:30-8:50	General Session: <b>Welcome + Key Announcements + Don't Miss Sessions</b>					
8:50-9:50	General Session Keynote: <b>TBA</b>					
10:00-10:50	MS Word Merge* <sup>REC</sup>		Reconciling Your Recording Charges <sup>REC</sup>	Basics of Document Development*	Tracking Curative Items and Policy Creation <sup>REC</sup>	Custom Order Rules* <sup>REC</sup>
11:00-11:50	Getting Ready for an Audit		Tips, Tricks & Shortcuts <sup>REC</sup>	Power BI	SQL Administration <sup>REC</sup>	Order Contact Maintenance <sup>REC</sup>
12:00-1:00	LUNCH					
1:00-1:50	Template Creation & Management <sup>REC</sup>	Reports Roundtable	ClosingsLIVE <sup>REC</sup>	Intro to Logic Statements for Document Development*	Basic Order Tracking <sup>REC</sup>	
2:00-2:50	Benefits of Using Ledgers in ProTrust <sup>REC</sup>		ClosingsLIVE Administration	Custom Reports Capabilities	Basic Automation <sup>REC</sup>	Advanced Automation* <sup>REC</sup>
2:50-3:20	Networking with Exhibitors and SoftPro Innovation Showcase					
3:20-4:10	ReadyDocs Manager <sup>REC</sup>		What's New in Select + Custom Integrations			Understanding Groups, Users & Permissions <sup>REC</sup>
4:20-5:10	SoftPro Resources <sup>REC</sup>			Useful Reports to Gain Business Insights	Funding Issues <sup>REC</sup>	Advanced Automation & Custom Order Rules

### Friday, April 11

7:30-8:30	Breakfast & Networking					
8:30-9:20	General Session: <b>State of Our Industry - A Regulatory Update</b>					
9:20-9:50	General Session: <b>Did You Know? + Announcements &amp; Raffle Winners</b>					
10:00-10:50	Tips, Tricks & Shortcuts for Standard & Enterprise <sup>REC</sup>		SP Banking <sup>REC</sup>	Documents in SPAdmin*	Basic Formulas <sup>REC</sup>	Advanced Formulas <sup>REC</sup>
11:00-11:50	Documents Roundtable		Existing Liens Screen <sup>REC</sup>	Advanced Commercial - Portfolio Settlements	Template Creation and Management <sup>REC</sup>	Post-Upgrade Configuration

**Standard & Enterprise Track Sessions**

**Universal Sessions Open to All Users**

**Select Track Sessions**

**REC = Sessions that offer a pre-recorded version. \* = Sessions that have a prerequisite. All classes and schedules are subject to change.**

**SELECT TRACK class descriptions are on pages 8 - 9**

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# SELECT

## For SoftPro Select Edition Users

### Reconciling Your Recording Charges <sup>REC</sup>

**Thursday 10:00 AM – 10:50 AM**

Have you been reconciling your recording fees? This session will walk you through the functionality on the recording fee reconciliation process whether you e-file, mail your recorded documents in to the recording office, or walk them through the recorder's door. Learn how to run and interpret the Recording Fee Reconciliation report and indicate in your orders that you have addressed any recording fee discrepancies. This process is done in ProForm, not ProTrust, so it is available to everyone with ProForm access.

### The Basics of Document Development\* <sup>REC</sup>

**Thursday 10:00 AM – 10:50 AM**

In this session, we will dive into the basics of ReadyDoc development. We will explore items such as the Field Code Browser, differences between a ReadyBloc and a ReadyDoc, and a brief overview of ProDesign. We'll also cover Basic ReadyDoc development, including importing your new ReadyDoc and adding to a ReadyDoc Tree. **\*PREREQUISITE:** Must have working knowledge of MS Word.

### Tracking Curative Items and Policy Creation <sup>REC</sup>

**Thursday 10:00 AM – 10:50 AM**

Are you tracking Title Curatives (defects or clouds) on title? Did you know that SoftPro Select has a Policy Instruction screen that can do just that, as well as assist with Policy Creation? Join our Tracking Curative Items and Policy Creation session to see just how this works.

### Custom Order Rules\* <sup>REC</sup>

**Thursday 10:00 AM – 10:50 AM**

Learn all that Custom Order Rules can do for you. Require certain fields to be populated, set a value when certain conditions exist, and set fields as "read only" for users who should not have access. **\*PREREQUISITE:** Must have working knowledge of Python.

### Tips, Tricks & Shortcuts for SoftPro Select <sup>REC</sup>

**Thursday 11:00 AM – 11:50 AM**

Did you know SoftPro just released an enhanced version of Select? Join this session for tips, tricks, and keyboard shortcuts as we explore the latest enhancements that are sure to elevate your SoftPro Select experience.

### Power BI

**Thursday 11:00 AM – 11:50 AM**

Power BI is a powerful tool that makes it easy to visualize and analyze your data. Join our demo to see how the SoftPro Select Power BI dashboard can help you make better decisions and share insights across your team, covering all aspects of an order's life from the time it was open, to the revenue it will generate.

### Order Contact Management <sup>REC</sup>

**Thursday 11:00 AM – 11:50 AM**

Does your Order Contacts list need a little TLC? Do you find that contacts are incomplete when it is time to disburse checks? Come and join us to learn the ins and outs of maintaining clean order contact lookup tables.

### Intro to Logic Statements for Document Development\* <sup>REC</sup>

**Thursday 1:00 PM – 1:50 PM**

In this document development session, we will dive into FOREACH Statements, Basic IF Statements, Nested IF Statements, IF statements with COUNT commands, and basic logic statements.

**\*PREREQUISITE:** Attended Basic Document Development session or prior experience in document development.

### Basic Order Tracking <sup>REC</sup>

**Thursday 1:00 PM – 1:50 PM**

Are you manually monitoring the status and closing of your orders? Would you like to start tracking your orders electronically? SoftPro Select's tasking can keep you informed about the order's journey, including production, processing, closing and post-closing tasks, all within the application. Learn how tasking can be used to track your orders.

### Custom Reports Capabilities

**Thursday 2:00 PM – 2:50 PM**

Even though you have access to many reports in SoftPro Select, are you aware that you can also have reports built to suit your company's specific needs? Join this session to learn how to run and navigate reports, along with all the options available for custom reports.

### Basic Automation <sup>REC</sup>

**Thursday 2:00 PM – 2:50 PM**

What is automation? How can you access ready-made automation processes? See how automation can aid in some of the routine aspects of your orders and obtain a basic understanding of the monitoring process. This class is a must for anyone who has never touched an automation process or wants to ensure you have the basics covered.

### Advanced Automation\* <sup>REC</sup>

**Thursday 2:00 PM – 2:50 PM**

Are you ready to kick your automation up a level and think outside the wizard? In this advanced class, learn how you can use code snippets to leverage all the possibilities of automation.

**\*PREREQUISITE:** Basic automation understanding.

### What's New in Select + Custom Integrations

**Thursday 3:20 PM – 5:10 PM**

We will cover a lot of ground in this session, so hang on to your cowboy hat! In the first portion of this session we'll share what can be accomplished with SoftPro's unique integration and customization capabilities and how Select API can be leveraged to give your business the edge it needs to compete in today's market. We'll also highlight some of the exciting new functionality in Select. During the second portion of this session, we'll demonstrate how to put the latest and greatest Select features to work for you!

### Understanding Groups, Users and Permissions <sup>REC</sup>

**Thursday 3:20 PM – 4:10 PM**

Learn how to manage users' access to SoftPro Select features and functionality using the Users, Groups and Permissions managers in SPAdmin.

### Useful Reports to Gain Business Insights

**Thursday 4:20 PM – 5:10 PM**

How familiar are you with the variety and abundance of reports available at your fingertips? SoftPro Select's default bundle contains over 200 reports already created for you! Join this session to gain insight on

### Funding Issues <sup>REC</sup>

**Thursday 4:20 PM – 5:10 PM**

Contact codes are an essential part of how the register auto-balances in Select. When data on your document (CD/HUD/CSS) changes after funds have been receipted and/or disbursed, there is a possibility for balance issues. Join this session to learn how to troubleshoot register balance issues by understanding how Contact Codes affect funding.

### Advanced Automation & Custom Order Rules

**Thursday 4:20 PM – 5:10 PM**

Bring your complex and "how-to" questions to this discussion-based session, where we'll demonstrate how automation and custom order rules can help optimize efficiency and accuracy for your organization.

### SoftPro Banking <sup>REC</sup>

**Friday 10:00 AM – 10:50 AM**

Learn how the SoftPro Banking platform allows you to securely send and receive wire transfers and upload Positive Pay files from a network of integrated banks across the U.S.

### Documents in SPAdmin\* <sup>REC</sup>

**Friday 10:00 AM – 10:50 AM**

Is organization of documents on your

order to customize them. You'll also learn how to add custom fields, properly import documents you have created, and develop a customized Document Tree in SoftPro Select.

**\*PREREQUISITE:** Attended Basic Document Development session or prior experience in document development.

### Basic Formulas <sup>REC</sup>

**Friday 10:00 AM – 10:50 AM**

Learn how to create and read formulas using SoftPro's formula editor for copying data to other fields or creating due dates for tasks. This session is a must if you have never touched a formula before or would like to polish your basic knowledge.

### Advanced Formulas <sup>REC</sup>

**Friday 10:00 AM – 10:50 AM**

Learn advanced methods of creating formulas using SoftPro's formula editor. **Prerequisite:** Must have a basic understanding of formulas.

### Existing Liens Screen <sup>REC</sup>

**Friday 11:00 AM – 11:50 AM**

Do you have a need to produce Assumptions, Modifications or Subordinations? Do you track releases for payoffs? Learn the ins and outs of the Existing Liens screen with custom documents and SoftPro 360 integrations to utilize it to its fullest potential.

### Advanced Commercial - Portfolio Settlements

**Friday 11:00 AM – 11:50 AM**

Does your organization conduct portfolio settlements? Do you ever wish you can pull together multiple orders into one large closing statement? Learn how to effectively set up complex commercial orders to pull together into a single customized Portfolio Settlement Statement. NOTE: This session will illustrate how a custom statement would look. Because of the highly customized nature, the Portfolio Statement is not available in the default package.

### Template Creation and Maintenance <sup>REC</sup>

**Friday 11:00 AM – 11:50 AM**

Do you find yourself always changing or adding common information in your ProForm files? Learn how to create and update your templates to save yourself precious typing time and streamline your closing process.

### Post-Upgrade Configuration

**Friday 11:00 AM – 11:50 AM**

Do you know what you need to do to plan for an upgrade? What needs to be considered and planned for? Join us for this session to discuss what you can do in advance and what you need to do post-upgrade to ensure a successful upgrade and that you are taking full advantage of everything new available to you. Don't miss out and leave efficiencies on the table!

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