

PORTALSYNC

POWERED BY: **Title** 

RELEASE NOTES

Software Version 3.11.145 PS2



About this Document

GreenFolders Release Notes provide information on the latest version of the GreenFolders Office Management System.

Scope

This document discusses the system requirements, New Features, Improvements, and Bug Fixes included in the release.

Acronyms and Abbreviations

The following acronyms and abbreviations are used in this document:

GF	GreenFolders
OS	Operating System
SMTP	Simple Mail Transfer Protocol
SSL	Secure Sockets Layer
PS	PortalSync

GreenFolders System Requirements

This section discusses the system requirements for GreenFolders.

Workstation

- **Operating System:** Windows 10 Professional. 32-bit and 64-bit versions.
- **Framework:** Microsoft .NET 4.7.2
- **Processor:** Intel Pentium 4 @ 2.8 GHz, or greater
- **Hard Drive:** 200 MB Minimum; 1 GB Recommended
- **Memory:** 4 GB; 8 GB Recommended
- **Graphics:** 256 MB Minimum and DirectX v.9
- **Internet Connection:** An internet connection is required at each site for remote Help Desk support.

Server

- **Operating System:** Microsoft Windows Server 2012, 2016 or 2019 with current service packs. 64-bit version only.
- **Framework:** Microsoft .NET 4.7.2
- **Processor:** Core 2 Duo, Core 2 Quad or Xeon Class Processor
- **Database:** Microsoft SQL 2012, 2014, 2016, or 2019 Express or Standard. Recommendations based on user count; contact GreenFolders Sales or GreenFolders Support for details.
- **Memory:** 4 GB Minimum; 8 GB Recommended. Recommendations based on user count; contact GreenFolders Support for details.
- **Hard Drive:** Minimum 250 GB of available space dedicated for GreenFolders. Recommendations based on user count; contact GreenFolders Support for details.
- **Network Card:** Gigabit/100 MB network card. A static MAC address is required for virtual environments.

PortalSync System Requirements

This section discusses the system requirements for PortalSync.

Workstation

- **Operating System:** Windows 10 Professional. 32-bit and 64-bit versions.
- **Framework:** Microsoft .NET 4.7.2

- **Processor:** 4 core processor or greater
- **Hard Drive:** 200 MB Minimum; 1 GB Recommended
- **Memory:** 4 GB; 8 GB Recommended
- **Graphics:** 256 MB Minimum and DirectX v.9
- **Internet Connection:** An internet connection is required at each site for remote Help Desk support.
- **Supported Browsers:**
 - Desktop:
 - Chrome
 - Safari
 - Firefox
 - Edge
 - Mobile: Chrome (both on iOS and Android), Safari (iOS), and Samsung Internet browser.

Server

- **Operating System:** Microsoft Windows Server 2012, 2016 or 2019 with current service packs. 64-bit version only.
- **Framework:** Microsoft .NET 4.7.2
- **Processor:** 8 core processor or greater
- **Database:** Microsoft SQL 2012, 2014, 2016, or 2019 Express or Standard. Recommendations based on user count; contact GreenFolders Sales or GreenFolders Support for details.
- **Memory:** 10 GB Minimum; 16 GB Recommended. Recommendations based on user count/apps; contact GreenFolders Support for details.
- **Hard Drive:** Minimum 250 GB of available space dedicated for GreenFolders. Recommendations based on user count; contact GreenFolders Support for details.
- **Network Card:** Gigabit/100 MB network card. A static MAC address is required for virtual environments.

Backup Notice: When utilizing Microsoft SQL Express as your GreenFolders database engine, the data cannot be copied by regular system backups or automated backups and will require an additional specialized backup process. You are solely responsible for backing up GreenFolders data as it shall deem reasonably necessary to protect its images and information. GreenFolders strongly recommends that the specialized GreenFolders backup be done on a daily basis in addition to your regular system backups.

Network Notice: GreenFolders is a client-server application for Windows designed to operate effectively in a variety of different network environments. If your organization has remote offices and/or your users connect remotely using Citrix, Terminal Server or some other remote application, please contact GreenFolders Technical Support to ensure desired functionality is achieved.



RELEASE NOTES

Software Version 3.11.145



RELEASE NOTES

Software Version 3.11.145

Contact: If you need additional information or have any questions.

Support

titleiosupport@titleio.com

801.290.8585 (Ext: 2)

Sales

sales@titleio.com

801.290.8585 (Ext: 1)

Improvements

The following improvements have been added in PS2:

- PortalSync Progressive Web App
 - Users are able to save PortalSync to their homescreen on their device (dependent on browser)
 - With this functionality the application is optimized for the best user experience based on the browser they are using.
- Bi-Directional Notes – Notes now flow from PS to GreenFolders on Folder Notes, Tasks and Attachments
 - GreenFolders users can send Notes within the Folder and within Attachments and Tasks for specific users/parties.
 - PortalSync users can now add notes back into the folder, on the attachment and task for GreenFolders to consume, without having to look in email or login to PortalSync.
- Ability to Turn PortalSync notifications off/on at the Organization and User level
 - Email notifications for tasks performed within PortalSync or to a PortalSync user can now be turned off or on at two different levels.
- PortalSync notifications sent when items are added to PortalSync and GreenFolders.
- PortalSync Onboarding notification sent to party in GreenFolders that doesn't have an existing PortalSync Account.
- Removed Messaging from PortalSync
 - With the Bi-Directional notes functionality, messaging in PortalSync was no longer required, so that element has been removed.
- Deprecated SendSide for login in PortalSync
 - SendSide was the backbone for PortalSync for login and messaging. We rebuilt the login, forgot password and register so it is more efficient.
- Assignment of Parties to Notes on Tasks and Attachments
 - We've added the assignment of Parties on Attachments and Tasks, so you can assign all parties an attachment, but then send them individual notes regarding that attachment.
 - If a party has not been shared the Attachment or Task, and are shared a note related to that Attachment or Task, they will then be automatically assigned the Attachment or Task.
- Enhanced PortalSync Searching Capabilities
 - We enhanced the search capabilities for within PortalSync and within the Transaction in PortalSync. This will allow users to easily find the transaction and information they are looking for.
- Custom Display for each Organization and Selector Menu Dropdown
 - Within PortalSync each customer will see the organization(s) they are associated with in a dropdown and when selecting the org, it will show the org's branding.
- PortalSync Configuration added within GreenFolders and simplified
 - We combined PortalSync configuration within GreenFolders configuration and simplified it drastically.
- PortalSync Folder Status reads straight from GreenFolders
 - We removed mapping for Folder Statuses and allow the GreenFolder status to be shown in PortalSync.

- Multi-Org settings
 - For users that have more than one PortalSync account, they no longer have to manage multiple emails. They can login with 1 email and see transactions from multiple organizations.
- Syncing Set at Multiple Levels
 - Allowing GreenFolders users to Customize what is synced and what is not based on the following elements:
 - Folder Created Date
 - Attachment Type
 - Label
 - Folder Status
 - Task Status
 - Fields
- Folder Address Syncing between GreenFolders and PortalSync
 - Filtering by address in PortalSync
- My Contact(s) from GreenFolders sent to PortalSync
 - My Contact defaults to the person the Folder is Assigned to in GreenFolders
 - If no one is assigned it will default to the last modified by or created by
 - My Contacts in PortalSync supports folders being assigned to groups and shows the contact information for all GreenFolders Users in the assigned Group.
- Task Assignment to Groups within GreenFolders
 - Tasks can be assigned to groups within GreenFolders and all members of the group show as the Task Owner in PortalSync.
- My Profile in PortalSync
 - Allows the PortalSync user to change their name, city, state, phone, password, and upload a profile picture.
 - Allows them to see what organizations they are members of
- Changed the systems so GreenFolders and PortalSync emails are case insensitive.
- Added support for downloading more than 10 documents within PortalSync by sending the user an email with a link to download the zip and also showing a popup in the browser to let them know the zip file is ready for download.
 - User can download from Email or Popup
- All items set to Not Sync, then change to Sync, should push all updates made and shared with parties while in Not Sync status.
- Added ability to show GreenFolders Users items (notes, attachments, tasks) in PortalSync without having to share it with them as a party.
- PortalSync Documents
 - Defined attachment type for documents coming from PortalSync.
 - Prefixed all documents uploaded in PortalSync with PS_ so search can be run to report on all documents uploaded in PortalSync.
- Enhanced notes in PortalSync to show spacing and some formatting and a line separator between notes.
- Sync Now button was added at the folder level to do a folder sync in the event something was missed.
- Alerts in PortalSync to document updates made to Folder (In Beta)
 - An alerts tab in PortalSync allows a PortalSync user to see all updates to the folder and the components. They will be able to click on the folder link and go directly to that update.



RELEASE NOTES

Software Version 3.11.145



RELEASE NOTES

Software Version 3.11.145

CONTACT US

For any questions concerning these release notes, general questions, or assistance, please contact us. We look forward to hearing from you:

Support

titleiosupport@titleio.com

801.290.8585 (Ext: 2)

Sales

sales@titleio.com

801.290.8585 (Ext: 1)