

## Creating a New Group - Adding Permissions, Views, Services and Users

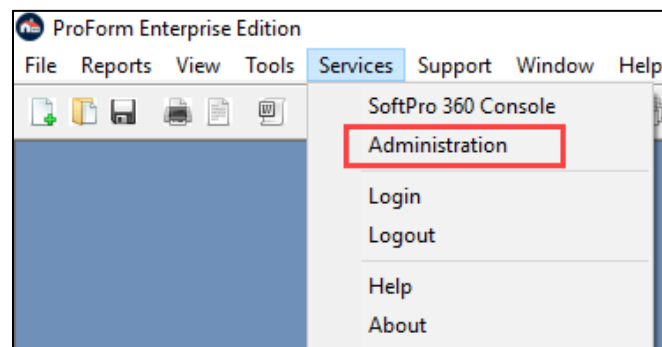
### **NOTE:**

These instructions are to assist in creating New Groups and adding Users, Permissions, Views and Services to the New Group.

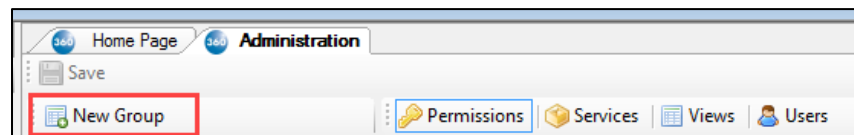
### **IMPORTANT:**

If there is an Admin and All Users group already created you will want to remove the users that are selected for the new group from those groups as this will become the default group for those users.

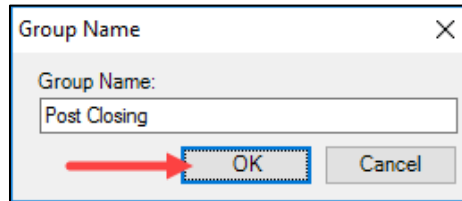
Navigate to the **Administration** part of the **Softpro 360 Console** by selecting **Services > Administration** in ProForm. If you are not logged in, it will prompt you to enter your email address and password and then click **Sign In**, once logged in the **Administration** screen will open.



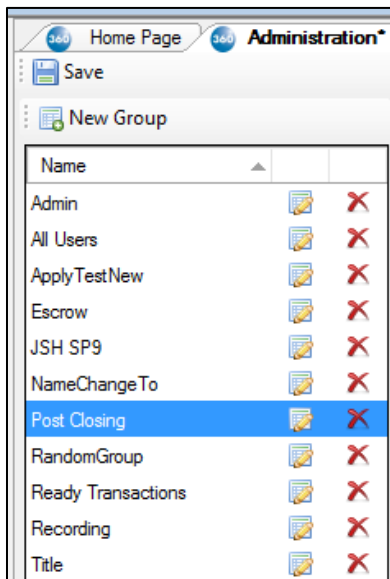
Click on the **New Group** button.



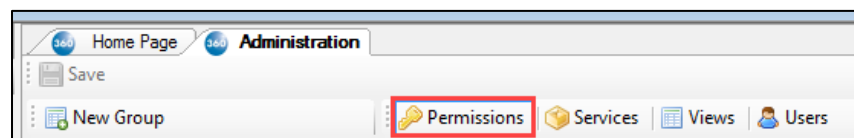
The **Group Name** box will open. **Name** the new group and click **OK**. Group Names can be based on a number of factors: Profiles, Offices, Locations or Departments (i.e. Escrow/Title/Order Entry/Post Closing).



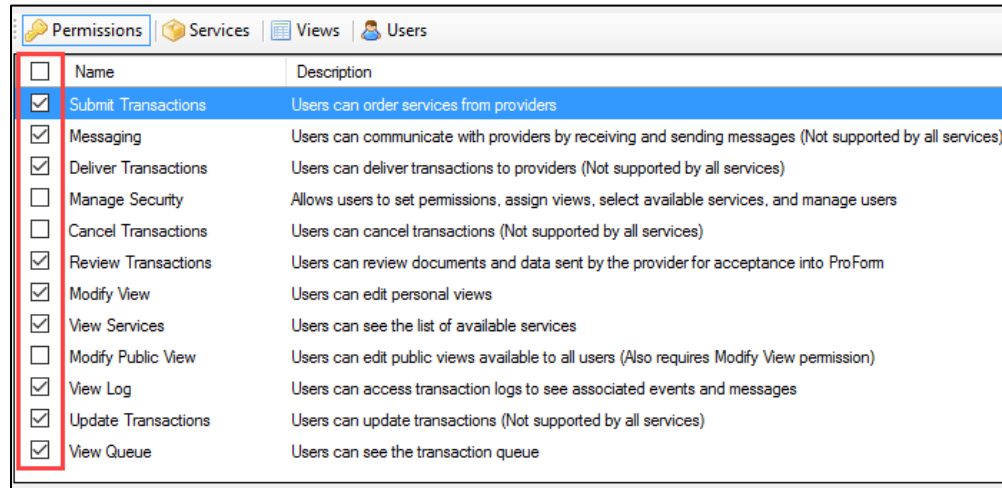
The **Group** is now located within the Groups list. Highlight the **Group** to add **Permissions**, **Services**, **Views** and **Users**.



Next, click on the **Permissions** button.

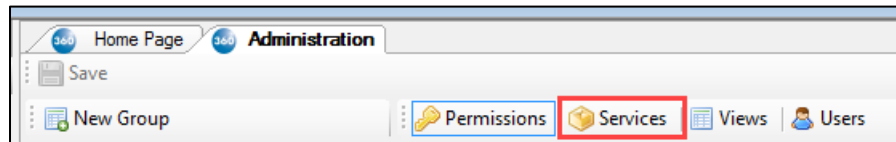


Check or uncheck the boxes for the **Permissions** the users will have for **SoftPro 360** within this **Group**. Under the **Name** heading is a list of the names of the permissions available and under the **Description** heading is a description of the permissions.

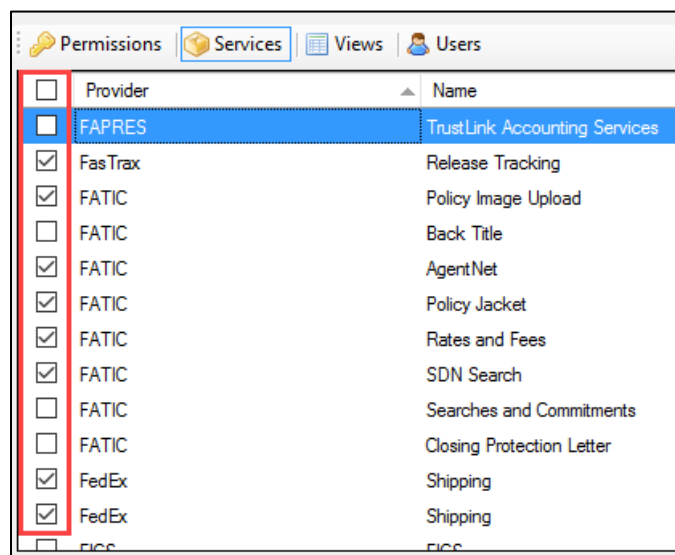


<input type="checkbox"/>	Name	Description
<input checked="" type="checkbox"/>	Submit Transactions	Users can order services from providers
<input checked="" type="checkbox"/>	Messaging	Users can communicate with providers by receiving and sending messages (Not supported by all services)
<input checked="" type="checkbox"/>	Deliver Transactions	Users can deliver transactions to providers (Not supported by all services)
<input type="checkbox"/>	Manage Security	Allows users to set permissions, assign views, select available services, and manage users
<input type="checkbox"/>	Cancel Transactions	Users can cancel transactions (Not supported by all services)
<input checked="" type="checkbox"/>	Review Transactions	Users can review documents and data sent by the provider for acceptance into ProForm
<input checked="" type="checkbox"/>	Modify View	Users can edit personal views
<input checked="" type="checkbox"/>	View Services	Users can see the list of available services
<input type="checkbox"/>	Modify Public View	Users can edit public views available to all users (Also requires Modify View permission)
<input checked="" type="checkbox"/>	View Log	Users can access transaction logs to see associated events and messages
<input checked="" type="checkbox"/>	Update Transactions	Users can update transactions (Not supported by all services)
<input checked="" type="checkbox"/>	View Queue	Users can see the transaction queue

When completed with **Permissions**, click on **Services**.

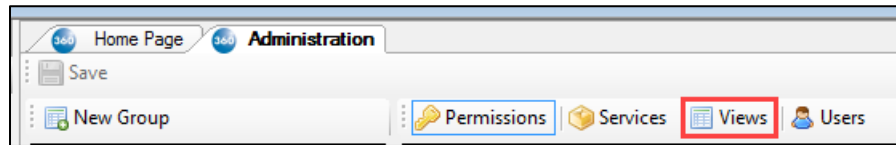


Check the boxes for the **Services** that you would like the **Group** to have access to or uncheck the boxes for the **Services** that you do not want the users to have access to. Under the **Provider** heading is a list the Names of the **Providers** and under the **Name** heading is a list of the **Products** that are available from that **Provider**. Scroll and complete this process for all **Services** listed.

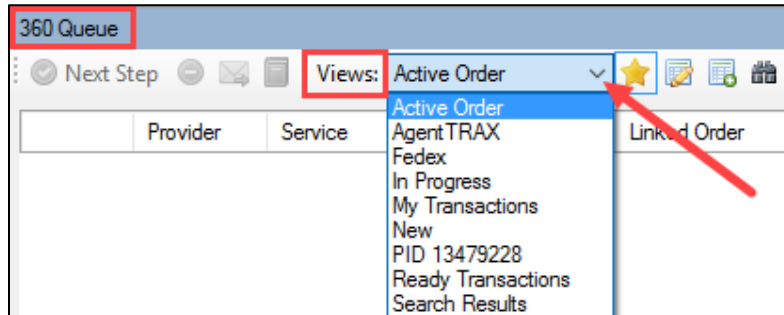


<input type="checkbox"/>	Provider	Name
<input checked="" type="checkbox"/>	FAPRES	TrustLink Accounting Services
<input checked="" type="checkbox"/>	FasTrax	Release Tracking
<input checked="" type="checkbox"/>	FATIC	Policy Image Upload
<input type="checkbox"/>	FATIC	Back Title
<input checked="" type="checkbox"/>	FATIC	AgentNet
<input checked="" type="checkbox"/>	FATIC	Policy Jacket
<input checked="" type="checkbox"/>	FATIC	Rates and Fees
<input checked="" type="checkbox"/>	FATIC	SDN Search
<input type="checkbox"/>	FATIC	Searches and Commitments
<input type="checkbox"/>	FATIC	Closing Protection Letter
<input checked="" type="checkbox"/>	FedEx	Shipping
<input checked="" type="checkbox"/>	FedEx	Shipping
<input type="checkbox"/>	FICC	FICC

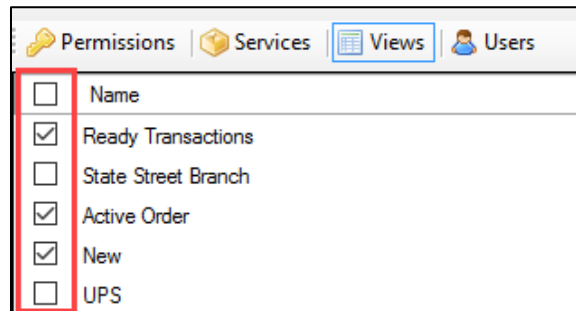
When completed with **Services**, click on **Views**.



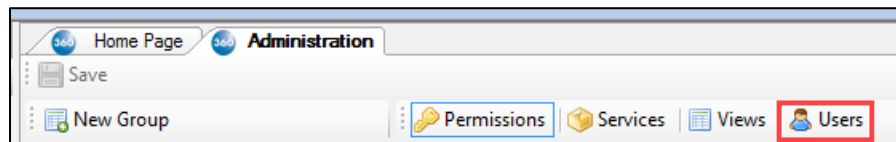
**Views** will dictate which transactions the user can see when they access the **360 Queue**.



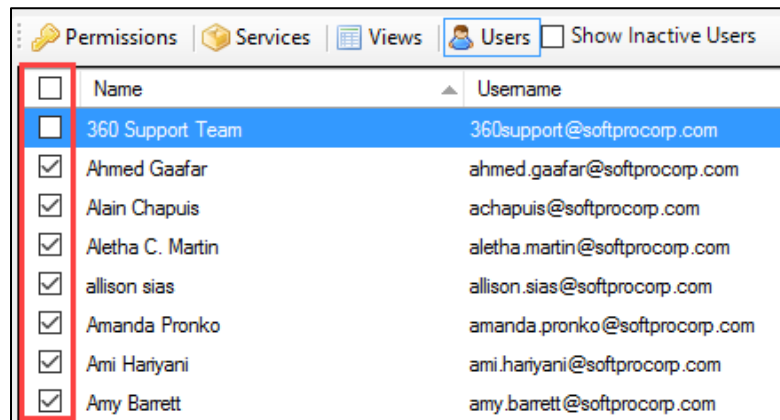
Check or uncheck the boxes for the **Views** that you would like to set for the **Group**.



When completed, click on the **Users**.



Select all users that will be included in the **Group**.



Click **Save** to save this **Group** and its **Permissions**, **Services**, **Views** and **Users**.

