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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 **360** module tab. Click on the **Administration** button on the **360** ribbon. If you are already logged in the **Administration** screen will open. 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.

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ProForm Pro	oTrust ProD	esign	Pro 1099	SF	Image	SPAdmin	360		
360 D Queue Services Search	Administration	Co Login	Logout	Inform	ation Help	About	2 Publish	Q Website	
Transactions	Se	curity			Resources		L	ive	
Start Page 🥹	Administratio	1 X							
🗄 🔂 New Group				1	Permission	; 🛛 🎯 Sen	vices	Views	🚨 Users
Name					Name				Description
Admin			X		Modify Pu	olic View			Users can edit public views availab
All Users			X		View Servi	ces			Users can see the list of available
ApplyTestNew			X		Modify Vie	w			Users can edit personal views
Escrow			X		View Queu	ie			Users can see the transaction que
JSH SP9			X	Update Transactions		Users can update transactions (No			
NameChangeTo		1	X		View Log				Users can access transaction logs
RandomGroup		1	X		Deliver Tra	ansactions			Users can deliver transactions to p
Ready Transactions			X		Messaging)			Users can communicate with provid
Recording		1	X	Submit Transactions		Users can order services from prov			
Title			X		Review Tr	ansactions			Users can review documents and o
Trainers-DO NOT REMOVE			X		Cancel Tra	insactions			Users can cancel transactions (Not
					Manage S	ecurity			Allows users to set permissions, as



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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, (ie Escrow/Title/Order Entry/Post Closing) for example

Start Page	🚳 Administration 🗙	
🕞 New Group		

Group Name		×
Group Name: Title		
	ОК	Cancel

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

🐻 New Group						
Name						
Admin		P	X			
All Users			X			
ApplyTestNew		2	X			
Escrow			X			
JSH SP9		2	X			
NameChangeTo		2	X			
RandomGroup		2	X			
Ready Transactions		2	X			
Recording			X			
Тіве			X			



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Next, click on the **Permissions** button and **Check** or **Uncheck** the boxes for the **Permissions** the users will have for SoftPro 360 within this group. Under the **Name** heading lists the names of the permissions available and under the **Description** heading is a description of the permissions

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

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. Scroll and complete this process for all **Services** listed.

Under the **Provider** heading list the Names of the **Providers** and under the **Name** heading, lists the **Products** that are available from the **Provider**

- <i>></i> 1	Permissions 🔞 Services 🗐 Views 🛛 🚨 Users	
	Provider 4	Name
	A.S.K. Services	Title Production
\checkmark	Accurate Checks	Checks, Forms, Envelopes
\checkmark	Alliant National	Closing Protection Letter
\square	Alliant National	Agent Resource Center
\checkmark	Alliant National	Policy Jacket
	American Property Guard	Property Tax Services
	Ameristar	Title Search Platform
	ANTIC	Jacket
	ANTIC	Commitment
	ANTIC	ClosingProtectionLetter
	ANTIC	Agents National
	ATGF	Attorneys Title
	ATGF	CPL, Jacket and Commitment
	Bancserv	Signing Service
	Calyx	Point
\square	CATIC	Policy Jacket
\square	CATIC	Closing Protection Letter
\square	CATIC	Jacket/CPL
	CATIC Title	Policy Jacket
	CATIC Title	Closing Protection Letter
	CATIC Title	Jacket/CPL
\checkmark	Checks and Forms for SoftPro	Checks and Forms



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When completed with Services, click on Views

Views are what the user would like to see when they access the 360 Queue.

Queue									
📀 Next Step	0 🖂 🖬	Views:	Active Order	- 🚖 🛛	🛛 🐻 🛗 Filter:	All Providers	-	2 11 🗇	
Provider	Service	Status	Active Order	^	Created By	Created On	Completed On	Description	Transaction Number
			PID 13479228						
			Ready Transactions						
			State Street Branch						
			UPS						
				-					

Select the **Views** that you would like to set for the New Group. Again by either Checking to give access to the selected items or Unchecking to Not give access.

🤌 Permissions 🛛 🎯 Services 🛛 🕅 Views 🖓 🙇 Users						
	Name					
\checkmark	New					
	UPS					
	PID 13479228					
\checkmark	Ready Transactions					
	State Street Branch					
	Active Order					

When completed, click on the Users button and select all users that will be within the New Group.

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