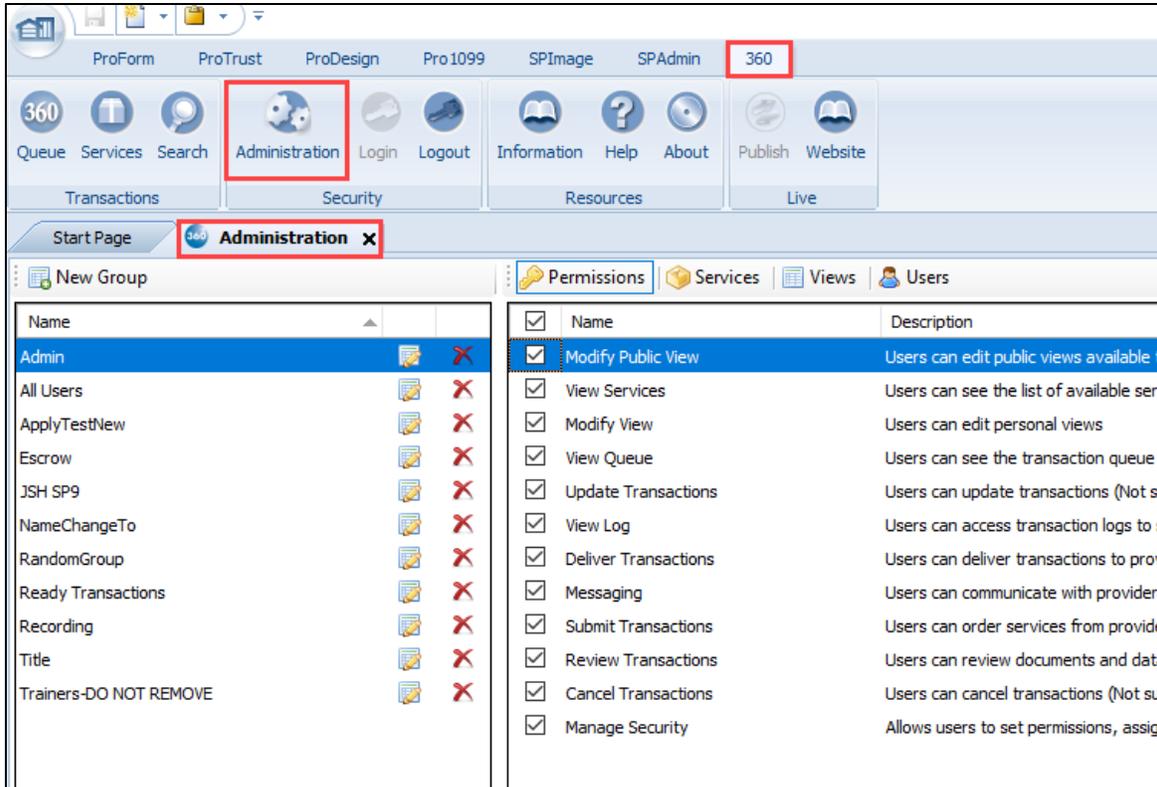


## Creating a New Group - Adding Permissions, Views, Services and Users

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

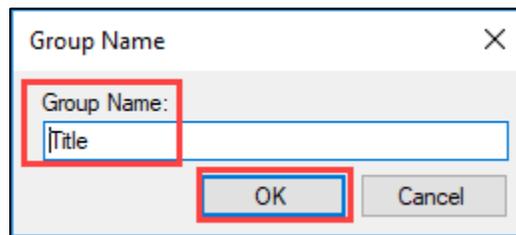
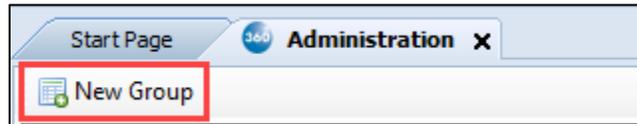
**IMPORTANT:**  
 If there is an Admin and All Users group already created you will want to remove the users that are selected for the new group from those groups as this will become the default group for those users.

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.

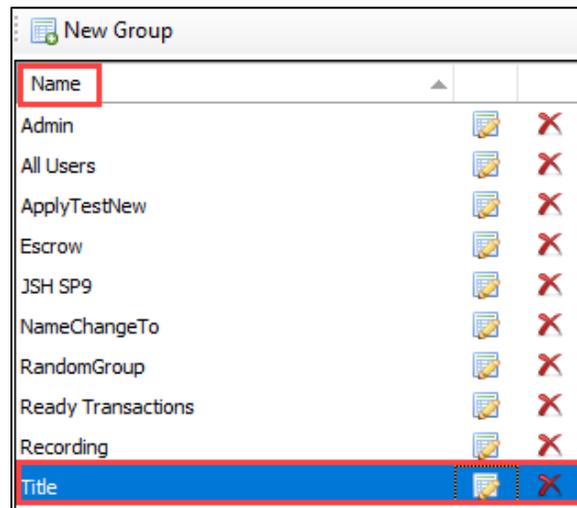


Click on the **New Group** button. The **Group Name** box will open. **Name** the new group and click **OK**

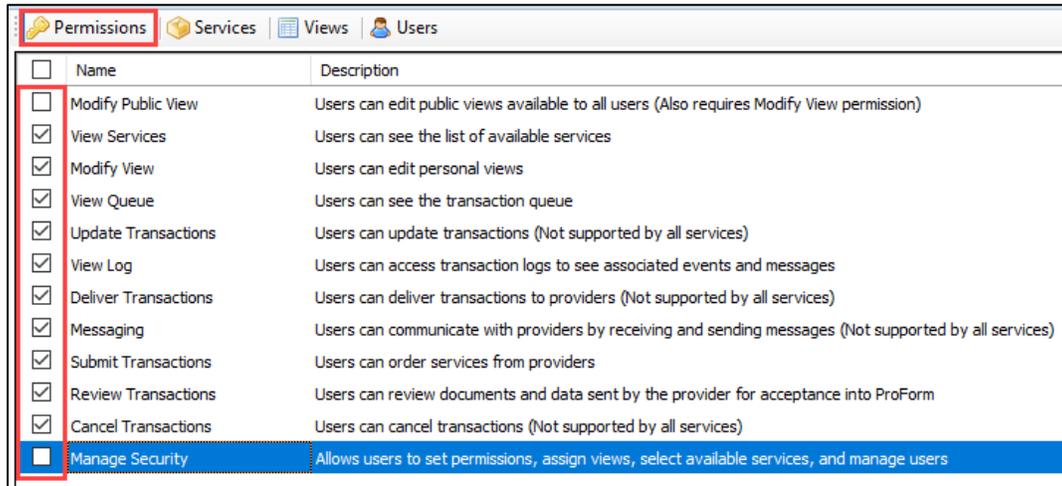
Group Names can be based on a number of factors, Profiles, Offices, Locations or Departments, (ie Escrow/Title/Order Entry/Post Closing) for example



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



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

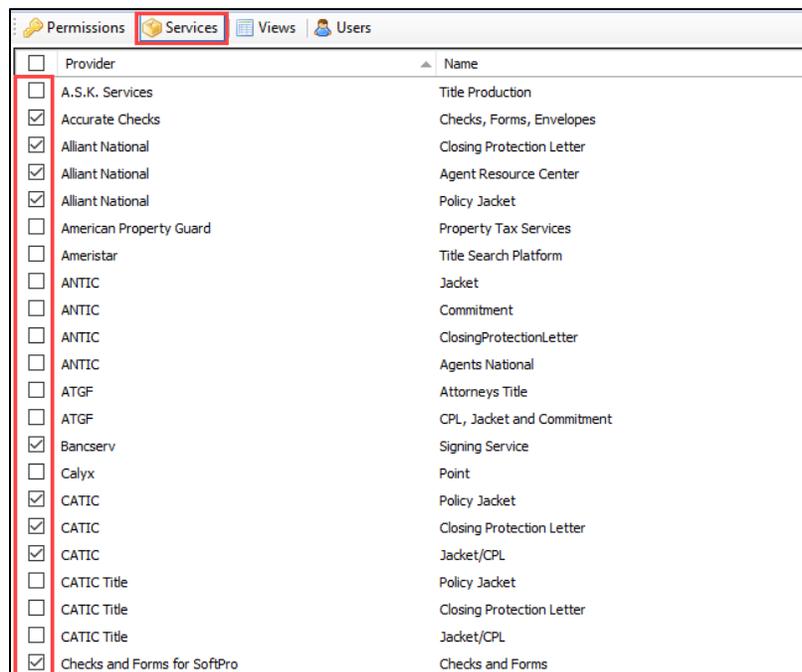


<input type="checkbox"/>	Name	Description
<input type="checkbox"/>	Modify Public View	Users can edit public views available to all users (Also requires Modify View permission)
<input checked="" type="checkbox"/>	View Services	Users can see the list of available services
<input checked="" type="checkbox"/>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

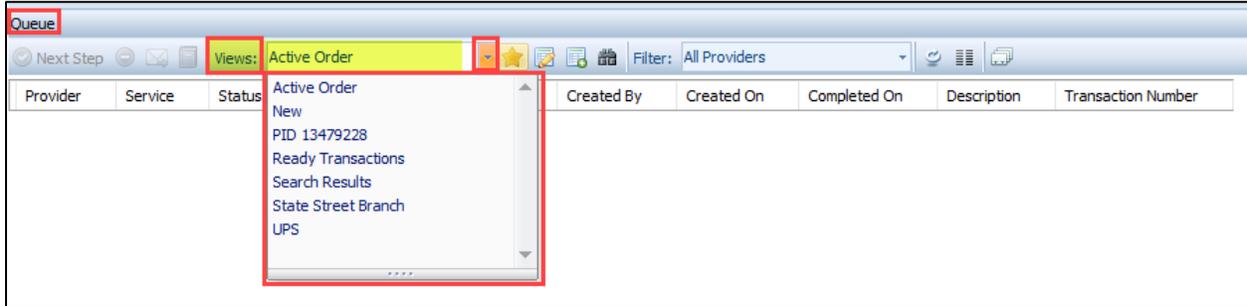
Under the **Provider** heading list the Names of the **Providers** and under the **Name** heading, lists the **Products** that are available from the **Provider**



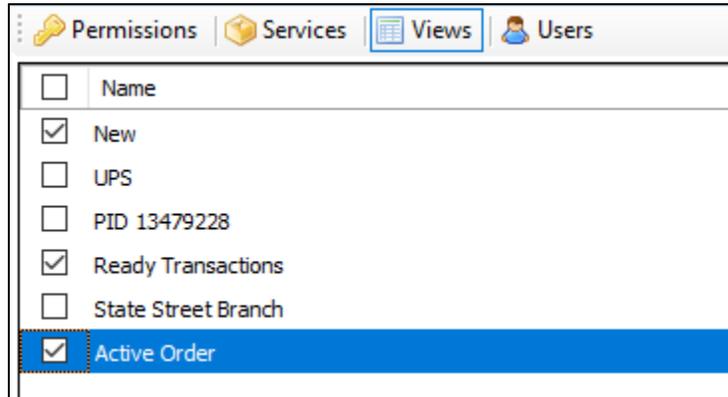
<input type="checkbox"/>	Provider	Name
<input type="checkbox"/>	A.S.K. Services	Title Production
<input checked="" type="checkbox"/>	Accurate Checks	Checks, Forms, Envelopes
<input checked="" type="checkbox"/>	Alliant National	Closing Protection Letter
<input checked="" type="checkbox"/>	Alliant National	Agent Resource Center
<input checked="" type="checkbox"/>	Alliant National	Policy Jacket
<input type="checkbox"/>	American Property Guard	Property Tax Services
<input type="checkbox"/>	Ameristar	Title Search Platform
<input type="checkbox"/>	ANTIC	Jacket
<input type="checkbox"/>	ANTIC	Commitment
<input type="checkbox"/>	ANTIC	ClosingProtectionLetter
<input type="checkbox"/>	ANTIC	Agents National
<input type="checkbox"/>	ATGF	Attorneys Title
<input type="checkbox"/>	ATGF	CPL, Jacket and Commitment
<input checked="" type="checkbox"/>	Bancserv	Signing Service
<input type="checkbox"/>	Calyx	Point
<input checked="" type="checkbox"/>	CATIC	Policy Jacket
<input checked="" type="checkbox"/>	CATIC	Closing Protection Letter
<input checked="" type="checkbox"/>	CATIC	Jacket/CPL
<input type="checkbox"/>	CATIC Title	Policy Jacket
<input type="checkbox"/>	CATIC Title	Closing Protection Letter
<input type="checkbox"/>	CATIC Title	Jacket/CPL
<input checked="" type="checkbox"/>	Checks and Forms for SoftPro	Checks and Forms

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

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



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.



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

<input checked="" type="checkbox"/>	Shane R. Petterson	shane.petterson@softprocorp.com
<input checked="" type="checkbox"/>	Angel Campbell	angel.demo@softpro360.com
<input checked="" type="checkbox"/>	Marcia Sachs	marcia.sachs@softprocorp.com
<input checked="" type="checkbox"/>	Rhonda Webb	rhonda.webb@softprocorp.com
<input checked="" type="checkbox"/>	Jodie Stewart	jodie.stewart@softprocorp.com
<input checked="" type="checkbox"/>	Jennifer Dooley	Jennifer.Dooley@softprocorp.com
<input checked="" type="checkbox"/>	Amanda Pronko	amanda.pronko@softprocorp.com
<input checked="" type="checkbox"/>	Jennifer Fields	jennifer.fields@softprocorp.com
<input checked="" type="checkbox"/>	jessica ames	jessica.ames@softprocorp.com