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Modifying the Vendor List

NOTE: These instructions are to assist in modifying the vendor list that users are able to see.

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.

ProForm Pro	oTrust ProDe	sign	Pro 1099	SPIm	age SF	Admin	360		
360 D Queue Services Search	Administration	Login L	Logout	Informati	on Help	O About	Publish	Website	
Transactions	Sec	urity			Resources		L	ive	
Start Page Administration 🗙									
🛛 🔂 New Group				Pe	rmissions	🔞 Serv	vices	Views	🚨 Users
Name				\checkmark	Name				Description
Admin		2	×		Modify Publ	c View			Users can edit public views available to
All Users	All Users 🔯 🔀		X	View Services		Users can see the list of available serv			
ApplyTestNew			X	\checkmark	Modify View			Users can edit personal views	
Escrow	Escrow 🔯 🔀		View Queue			Users can see the transaction queue			
JSH SP9 🔯 🔀		Update Transactions			Users can update transactions (Not su				
NameChangeTo 🔯 🔀		View Log			Users can access transaction logs to s				
RandomGroup 🔯 🗙		Deliver Transactions			Users can deliver transactions to prov				
Ready Transactions 🛛 🔯 🗙		Messaging			Users can communicate with providers				
Recording			X	\checkmark	Submit Transactions			Users can order services from provide	
Title			X	Review Trans		nsactions			Users can review documents and data
Trainers-DO NOT REMOVE 🔯 🔀		\checkmark	Cancel Transactions		Users can cancel transactions (Not su				
				\checkmark	Manage Security			Allows users to set permissions, assign	



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Highlight the **Group Name** that you would like to modify and then click on the **Services** button. By highlighting the **Group Name** and clicking **Services** this allows you to select the services that you would like that group to have access to when they access SoftPro 360 Services.

Start Page 🕹 Administration 🗙							
i 🔂 New Group			🔅 🔑 Permissions 🚫 Services	🔟 Views 🛛 🚨 Users			
Name			Provider	Name			
Admin		X	A.S.K. Services	Title Production			
All Users		X	Accurate Checks	Checks, Forms, Envelopes			
ApplyTestNew		X	Alliant National	Closing Protection Letter			
Escrow	2	X	Alliant National	Agent Resource Center			
JSH SP9		X	Alliant National	Policy Jacket			
NameChangeTo		X	American Property Guard	Property Tax Services			
RandomGroup		X	Ameristar	Title Search Platform			
Ready Transactions		X	ANTIC ANTIC	Jacket			
Recording		X	ANTIC ANTIC	Commitment			
Title		X	ANTIC	ClosingProtectionLetter			

Next, Check the boxes for **Vendors** that you would like the Group to have access to or **Uncheck** the boxes for the Vendors that you do not want the users to have access to. Scroll and complete this process for all vendors listed.

i 🤌 F	Permissions 🧐 Services 🛛 📺 Views 🛛 🚨 Users				
	Provider 🔺	Name			
	A.S.K. Services	Title Production			
\checkmark	Accurate Checks	Checks, Forms, Envelopes			
\checkmark	Alliant National	Closing Protection Letter			
\checkmark	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			
\checkmark	Bancserv	Signing Service			
	Calyx	Point			
\checkmark	CATIC	Policy Jacket			
\checkmark	CATIC	Closing Protection Letter			
\checkmark	CATIC	Jacket/CPL			
	CATIC Title	Policy Jacket			
	CATIC Title	Closing Protection Letter			
	CATIC Title	Jacket/CPL			
\mathbf{Y}	Checks and Forms for SoftPro	Checks and Forms			