

# NotaryLoop Automation User Guide

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## Introduction

The NotaryLoop integration with SoftPro 360 allows the user to setup Submit and Accept automation. Submit automation allows customers to immediately submit a request based on specific actions within the order. Accept automation allows customers to immediately accept data/documents into their ProForm order without having to review. Automation can be utilized only on SoftPro Select 4.3 and higher.

## Submit Automation

Submit automation allows the customer to immediately submit a request based on specific actions (triggers) within the order, (i.e., Adding a Task, Saving a ProForm Order, etc.). Contact your SoftPro Administrator to learn how to setup Submit Automation.

Submit Automation is available for the following products: This not available for NotaryLoop.

## Accept Automation Documents

Accept automation allows customers to immediately accept data/documents into their ProForm order without having to review. Contact your SoftPro Administrator to learn how to setup Accept Automation.

Accept Automation is available for the following products: Signing Service Provider

To setup Accept Automation, the following must occur.

1. At the **And if these conditions are met**, select the following:
  - a. **360 transaction field is specific value**
  - b. **360 transaction status is specific value**

*To set the specific values, see below*

The screenshot shows the 'Automation Process Wizard' window. At the top, there are three buttons: 'When' (with a clock icon), 'If' (with a funnel icon), and 'Then' (with a lightning bolt icon). Below these buttons, a list of conditions is displayed under the heading 'And if these conditions are met:'. The conditions are:
 

- 360 transaction product contains [specific value](#)
- 360 transaction provider reference name contains [specific value](#)
- 360 transaction provider reference number contains [specific value](#)
- 360 transaction sent to contains [specific value](#)
- 360 transaction status is [specific value](#)
- 360 transaction sub product contains [specific value](#)
- Order has the following criteria
- A [code snippet](#) evaluates to true

 Below the list, the text 'Here's your rule so far:' is followed by a summary of the rule:
 

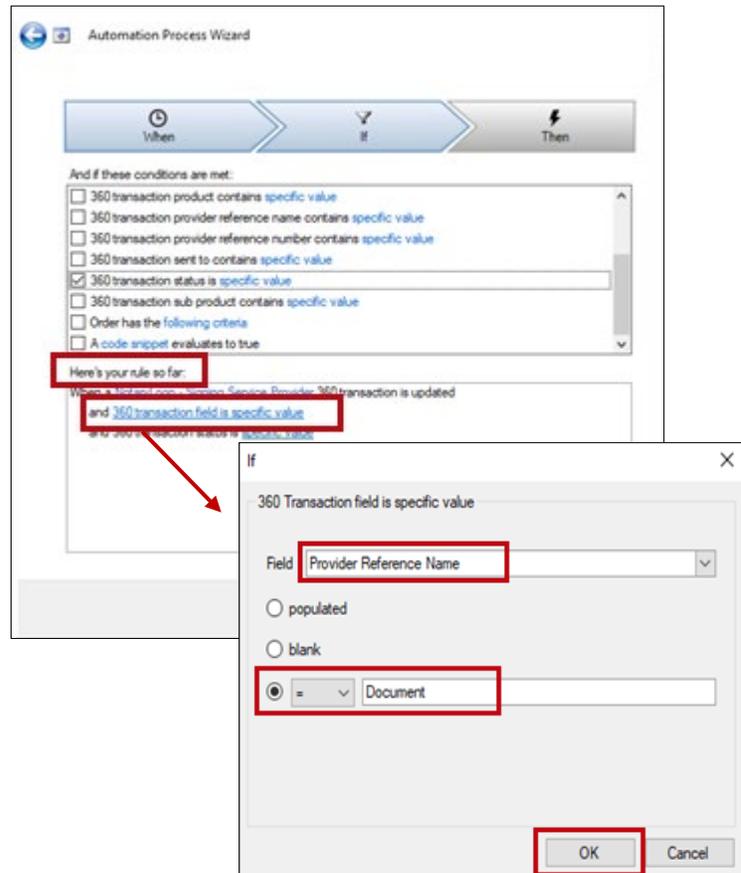
When a [NotaryLoop - Signing Service Provider](#) 360 transaction is updated  
 and [360 transaction field is specific value](#)  
 and [360 transaction status is specific value](#)

 At the bottom right of the window, there are two buttons: 'Next >' and 'Cancel'.

## 2. Set your specific 360 transaction field value

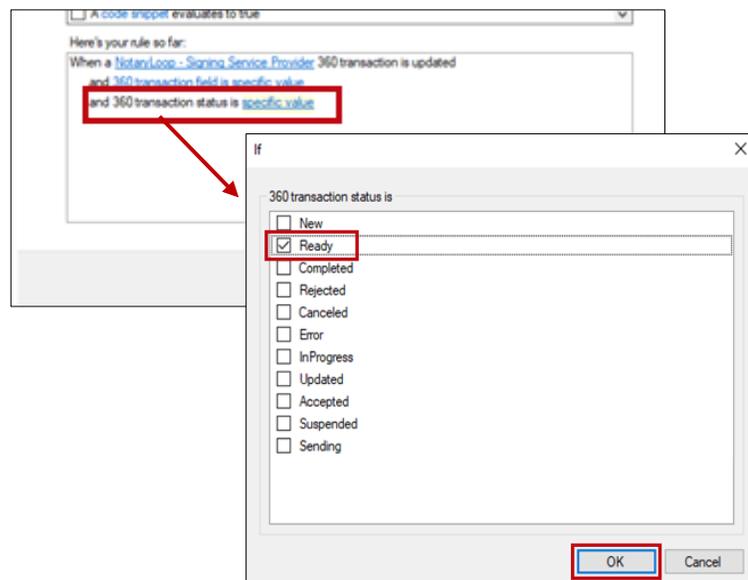
In the **Here's your rule so far** section,

- Click the **specific value** link
- From the **Field** drop-down, select **Provider Reference Name**
- Select the '=' (equal) radio button and enter **Document** in the field
- Click **OK**

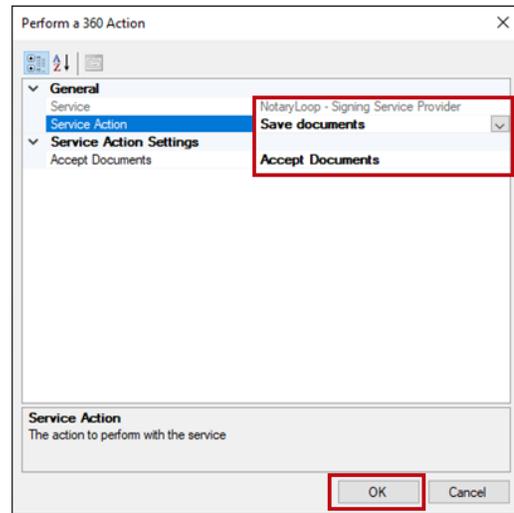


## 3. Set your specific 360 transaction status value

- Click the **specific value** link
- From the **360 Transaction status is** check the **Ready** check box
- Click **OK**



4. Set your **Perform a 360 Action Service**,
  - a. Click **NotaryLoop – Signing Service Provider**
  - b. **Service Action** – select **Save documents** from the drop-down
  - c. **Service Action Settings** – select the applicable action,
    - Accept Documents drop down **Accept Documents**; this will accept documents into the order
    - No Action – no documents will be imported into the order
  - d. Click **OK**



## Accept Automation Notes

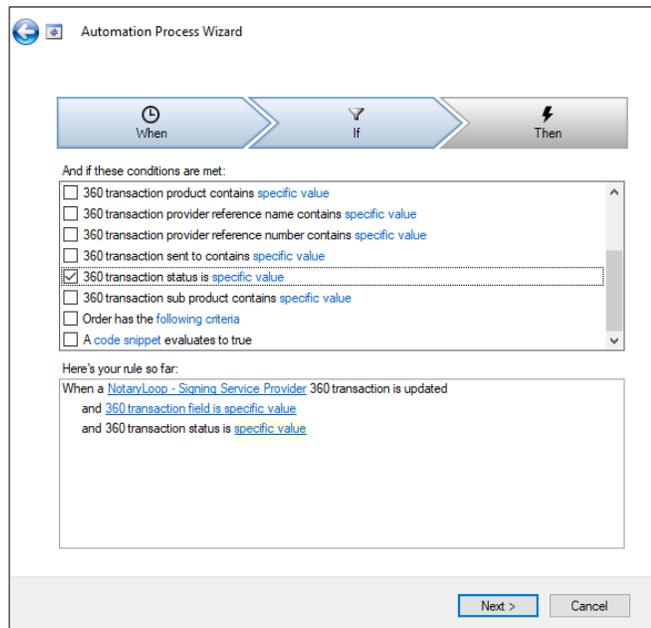
Accept automation allows customers to immediately accept data/documents into their ProForm order without having to review. Contact your SoftPro Administrator to learn how to setup Accept Automation.

Accept Automation is available for the following products: Signing Service Provider

To setup Accept Automation, the following must occur.

1. At the **And if these conditions are met**, select the following:
  - c. **360 transaction field is specific value**
  - d. **360 transaction status is specific value**

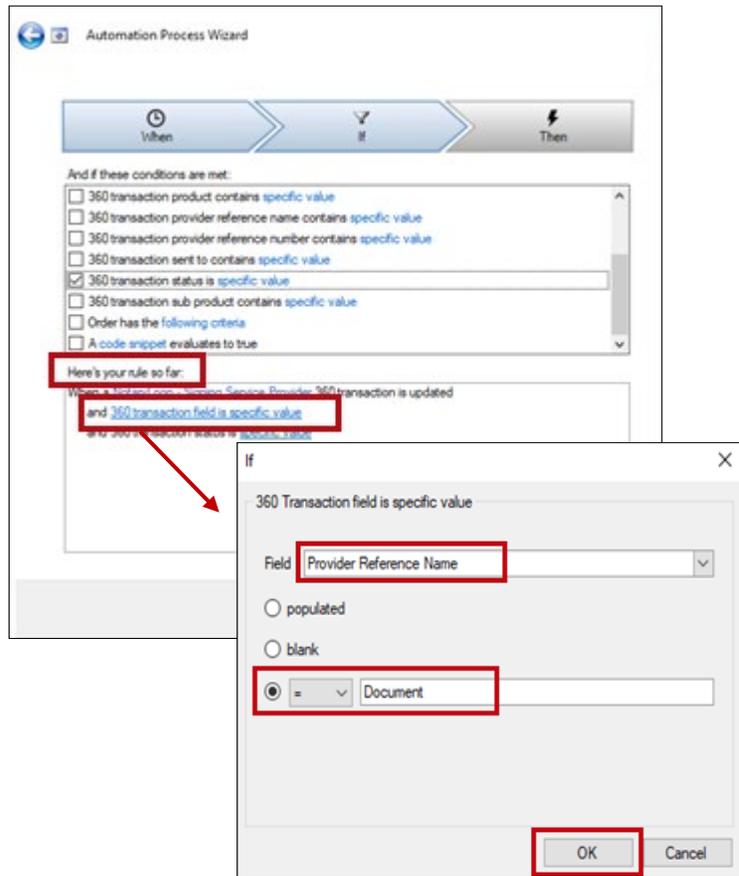
Set the specific values next.



2. Set your specific 360 transaction field value

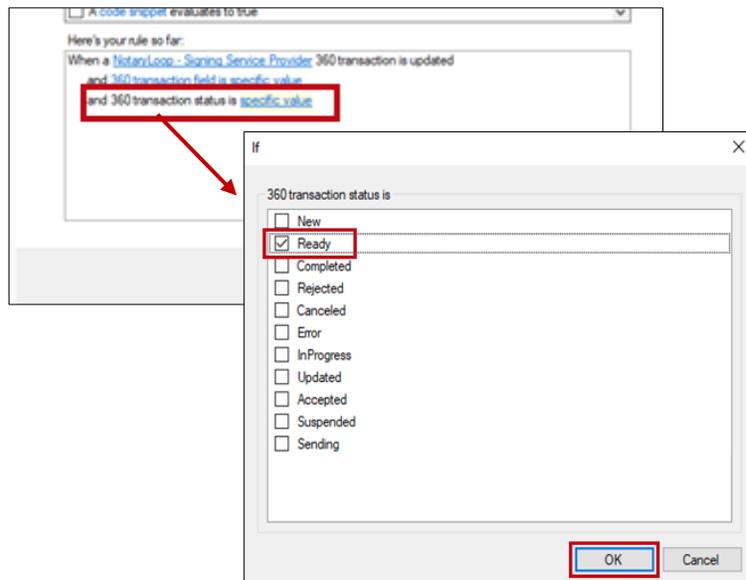
In the **Here’s your rule so far** section,

- e. Click the **specific value** link
- f. From the **Field** drop-down, select **Provider Reference Name**
- g. Select the ‘=’ (equal) radio button and enter **Document** in the field
- h. Click **OK**



3. Set your specific 360 transaction status value

- d. Click the **specific value** link
- e. From the **360 Transaction status is** check the **Ready** check box
- f. Click **OK**



4. Set your **Perform a 360 Action Service**,
  - a. Click **NotaryLoop – Signing Service Provider**
  - b. **Service Action** – select **Accept Notes** from the drop-down
  - c. Click **OK**

