

# Stewart Title Automation User Guide

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February, 2025

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## *Introduction*

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The Stewart Title integration with SoftPro 360 will allow user to setup Submit and Accept automation. Submit automation allows customer 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 thereafter.

## Submit Automation

Submit automation allows customer to immediately submit a request based on specific actions (triggers) within the order, such as Adding a Task, Saving a ProForm Order, etc. In order to find out how your organization setups up Submit Automation, please contact your SoftPro Administrator.

Submit Automation is available for the following products:

- Closing Protection Letters

Perform a 360 Action & Service Action Settings:

- General
  - Service: The service provider.
  - Service Action: The action to perform with the service provider.
- Service Action Settings:
  - 1.1. User ID: User ID registered with the service provider.
  - 1.2 Password: Password associated with the user ID.
  - 1.3 Property State: Enter property state.
  - 2.1 Agency: Enter the Agent ID.
  - 2.2 Location: Enter the location.
  - 2.3 Branch: Enter the branch.
  - 3. Covered Party: Select the covered party.
  - 4. Forms: Enter the form.
  - 5. Additional Party Type: Select the additional party type to add to the CPL.
    - 5.1 Participant's Name: Enter additional covered party name.
    - 5.2 Individual Attorney's Name: Enter individual attorney name.
    - 5.3 Participant's Address Line 1: Enter additional covered party address.
    - 5.4 Participant's Address Line 2: Enter additional covered party address.
    - 5.5 Participant's City: Enter additional covered party city.
    - 5.6 Participant's State: Enter additional covered party state.
    - 5.7 Participant's Zip Code: Enter additional covered party zip code.

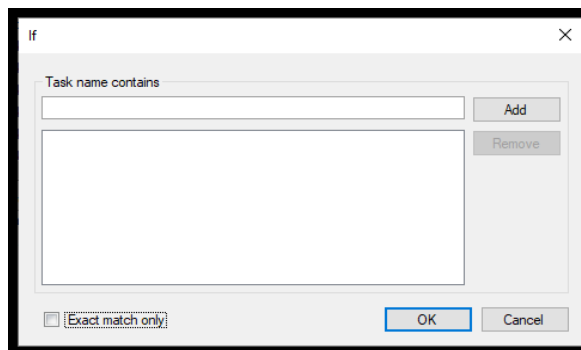
Service Action	Submit Order
Service Action Settings	
1.1 UserID	user@softpro.com
1.2 Password	*****
1.3 Property State	FL
2.1 Agency	StewartAccess test Agency
2.2 Location	StewartAccess Test Agency Inc - 19
2.3 Branch	None
3. Covered Party	Lenders
4. Forms	FL Closing Protection Letter
5. Additional Party Type	Approved Attorney
5.1 Participant's Name	Alan Attorney, PLLC
5.2 Individual Attorney's Name	Alan Attorney
5.3 Participant's Address Line 1	123 Test St
5.4 Participant's Address Line 2	Suite 321
5.5 Participant's City	Tampa
5.6 Participant's State	FL
5.7 Participant's Zip Code	33604

**5.7 Participant's Zip Code**  
Enter Participant ZipCode

OK Cancel

**\*\*Only one Additional Covered Party is currently allowed to be added to a CPL\*\***

- To set your specific task name
  - Click on Specific Value under 'Here's your rule so far:'
  - At the Task name contains
    - Text field
      - Add the task name and select 'Add' to add the new task name to the list below.
      - Select "Exact match only" checkbox (Optional).
    - Click OK



## Accept Automation

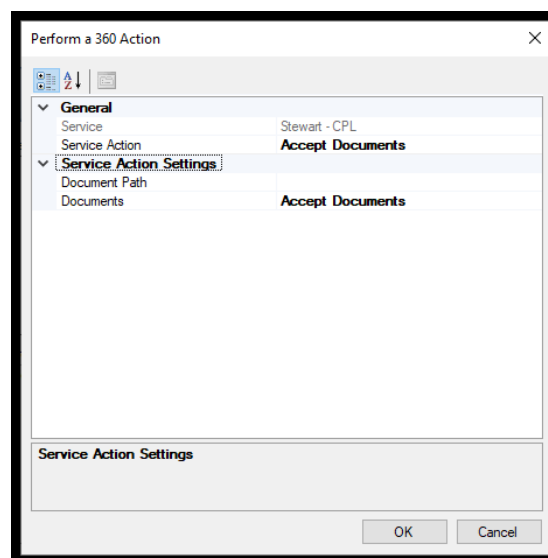
Accept automation allows customers to immediately accept data/documents into their ProForm order without having to review. In order to find out how your organization setups up Accept Automation, please contact your SoftPro Administrator.

Accept Automation is available for the following products:

- Accept Documents

Perform a 360 Action & Service Action Settings:

- General
  - Service: The service provider.
  - Service Action: The action to perform with the service provider.
- Service Action Settings:
  - Document Path: Enter folder path to deposit document(s). Leave blank to deposit to the default folder.
  - Documents: The action to take when the documents arrive.



- To set your specific 360 transaction status
  - Click on Specific Value under 'Here's your role so far:'
  - At the 360 Transaction field is specific value
    - Checkbox Options
      - Select Ready
    - Click OK

