

Documents – Using Email to Distribute from SoftPro Select

Emailing directly from SoftPro Select requires Outlook to be set up. If you have not already done so, refer to the job aid, *Outlook – Setting Up and Using to Distribute from SoftPro Select*.

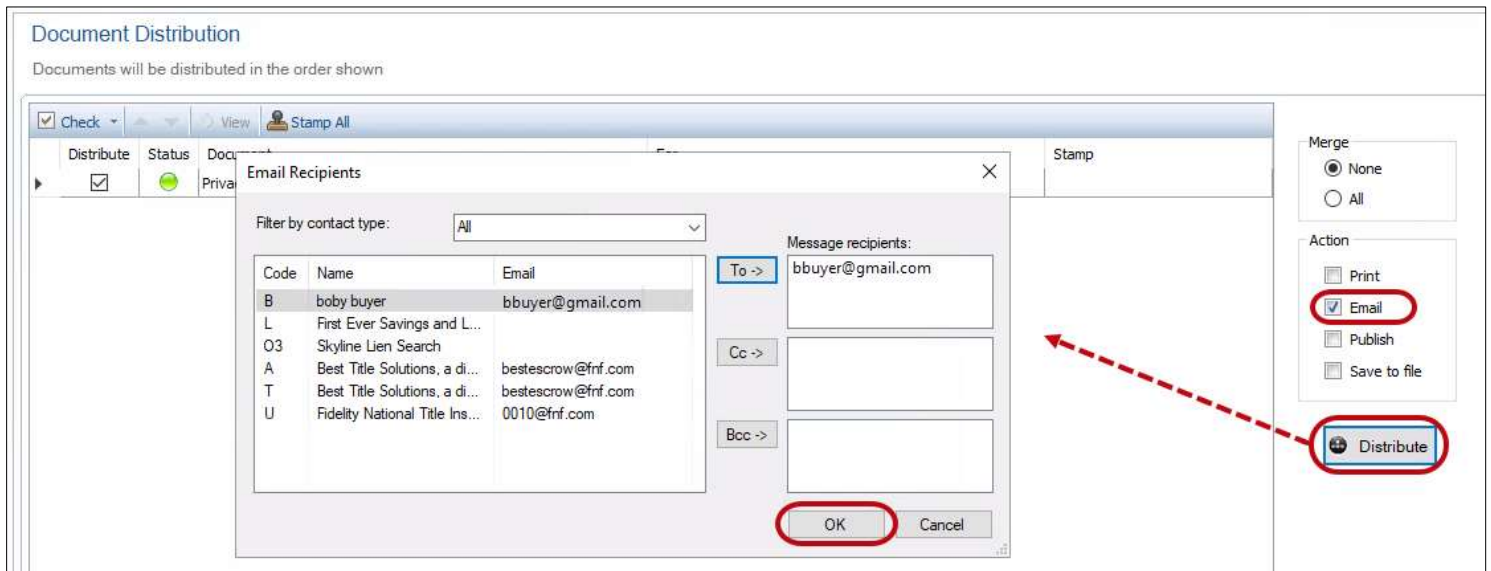
IMPORTANT: The use of the Email option requires management approval. Per Settlement Services, the approved method of document distribution via email continues to be through smartview.

Once you've selected the documents and navigate to the **Document Distribution** screen,

1. Check the **Email** option
2. Click the **Distribute** button

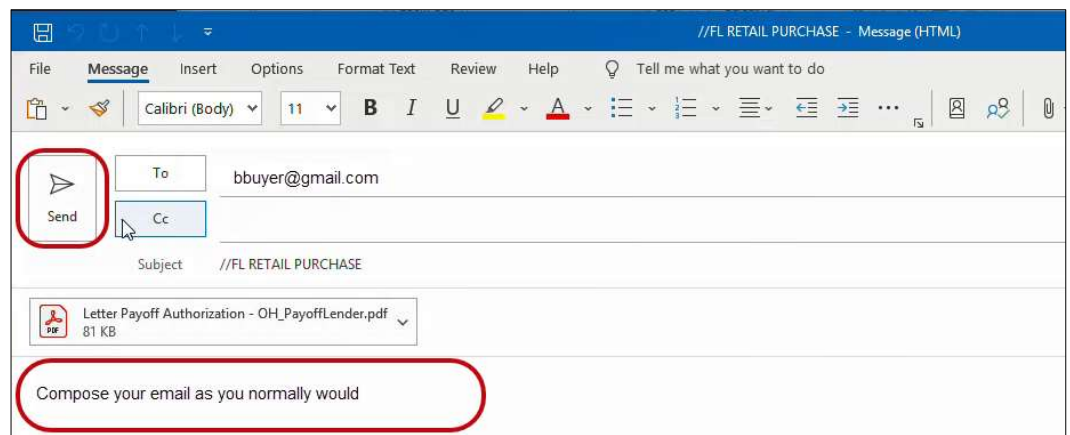
From the **Email Recipients** window,

3. Double-click the corresponding Contacts to move them to the **Message recipients** field; click the **Cc** or **Bcc** buttons to move recipients to add to those fields if you wish



When your email opens,

4. Compose your email as needed, add your signature line, if not already setup
5. Click **Send**



A copy of the message is saved to your **Sent** folder in Outlook (outside of Citrix).