

Setting Up and Using Email to Distribute From SoftPro Select

Follow these steps to set up Outlook and use the Email distribution option from SoftPro Select. If you have any questions or problems, contact your system administrator.

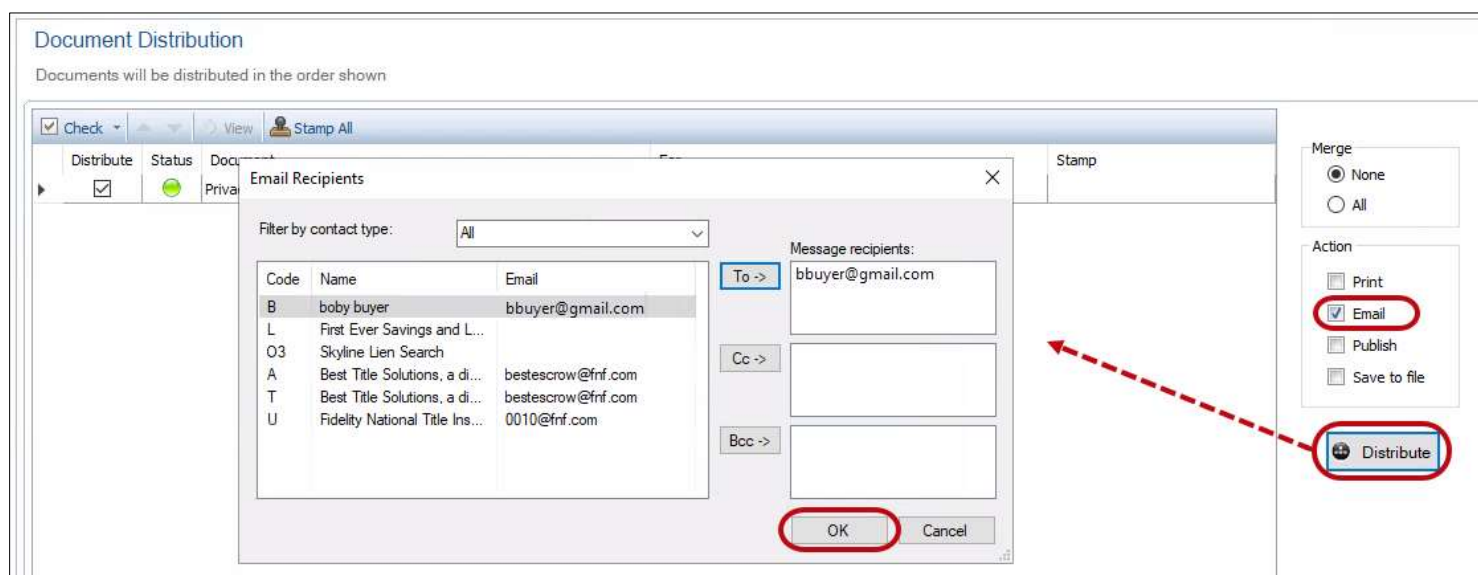
IMPORTANT: The use of the Email option requires management approval. Per Settlement Services, the approved method of document distribution via email continues to be through smartview.

Once you have previewed your documents and are ready to distribute,

1. Check the **Email** radio button
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



4. Click the **OK** button

A message is displayed stating you need to create a Microsoft Outlook profile.

5. Click the **OK** button

NOTE: Set up of your mail profile is only required the first time using the **Email** option in SoftPro Select.

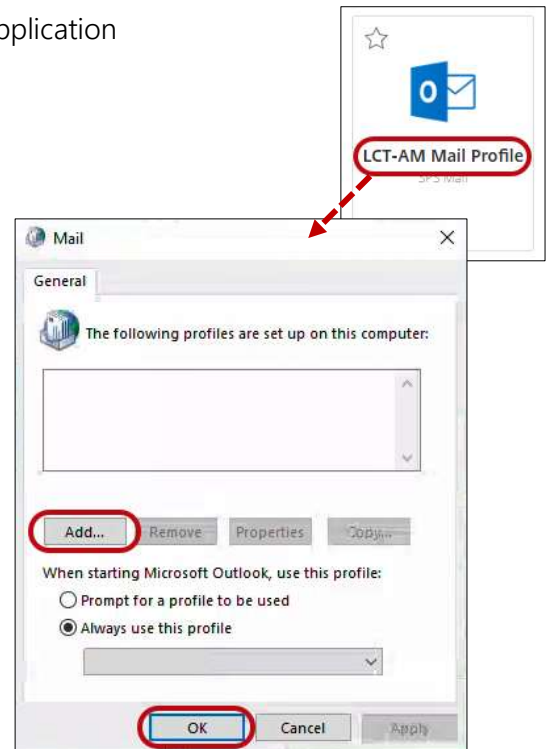


DO NOT CLOSE SOFTPRO SELECT.

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6. Navigate back to the **Citrix** window
7. Click the [your database] **Mail Profile** button once to launch the application

8. From the **Mail** window, click the **Add** button

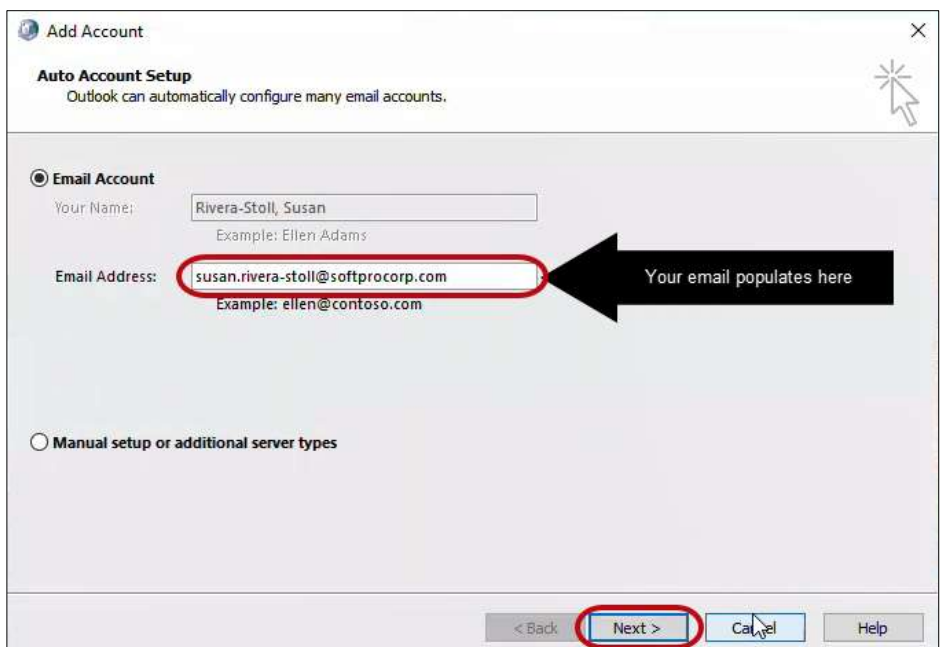


9. When prompted, enter your name in the **Profile Name** field; click **OK**



Your email address is populated in the **Email Address** field.

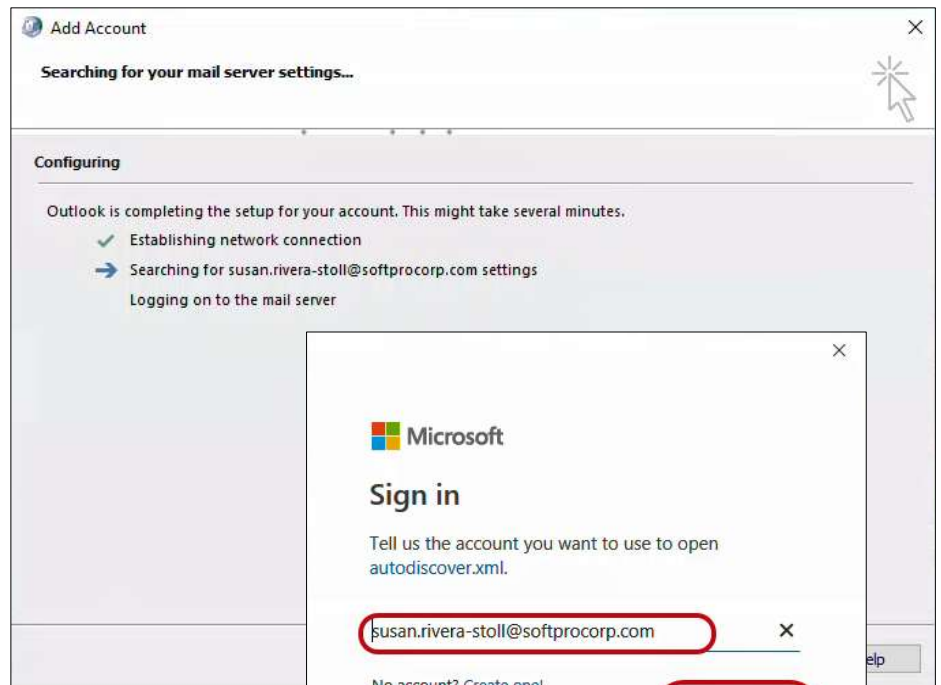
10. Click **Next** to continue



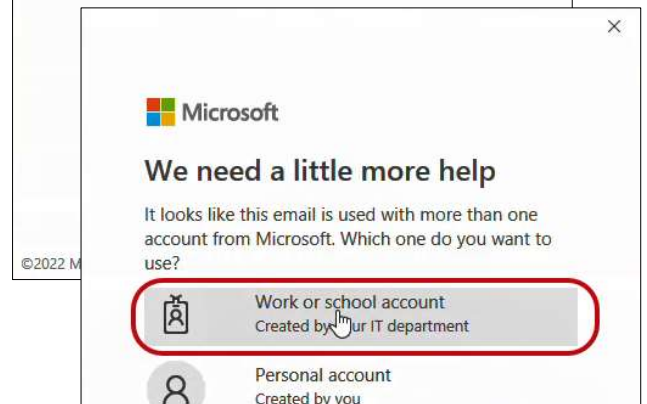
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The program searches for your email address on the email server. When found, the **Microsoft Sign In** window automatically opens with your email address populated for you.

11. Click **Next** to continue



12. Click the **Work or school account** option




When prompted to **Verify your identity**,

13. Select your preferred method



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14. Enter the code sent; click **Verify**



FIDELITY NATIONAL FINANCIAL

susan.rivera-stoll@softprocorp.com

Enter code

☐ We texted your phone +X XXX-XXX-XX20. Please enter the code to sign in.

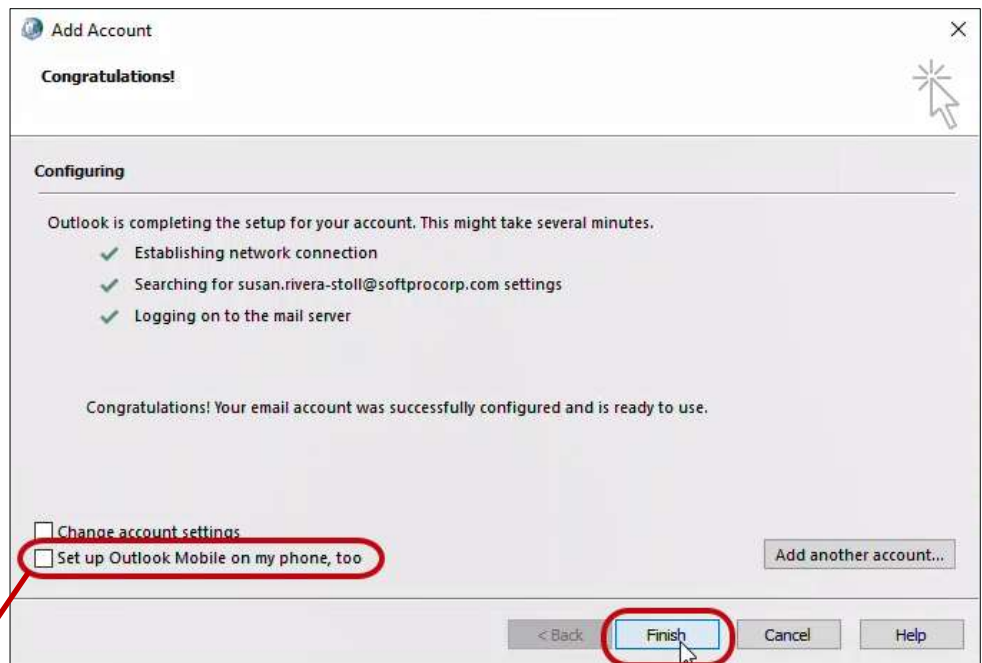
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Having trouble? [Sign in another way](#)

Verify

When your account is set up, the program displays the **Congratulations** window. From this window,

15. **Uncheck** the **Set up Outlook Mobile on my phone, too** check box
16. Click the **Finished** button



Add Account

Congratulations!

Configuring

Outlook is completing the setup for your account. This might take several minutes.

- ✓ Establishing network connection
- ✓ Searching for susan.rivera-stoll@softprocorp.com settings
- ✓ Logging on to the mail server

Congratulations! Your email account was successfully configured and is ready to use.

☐ Change account settings

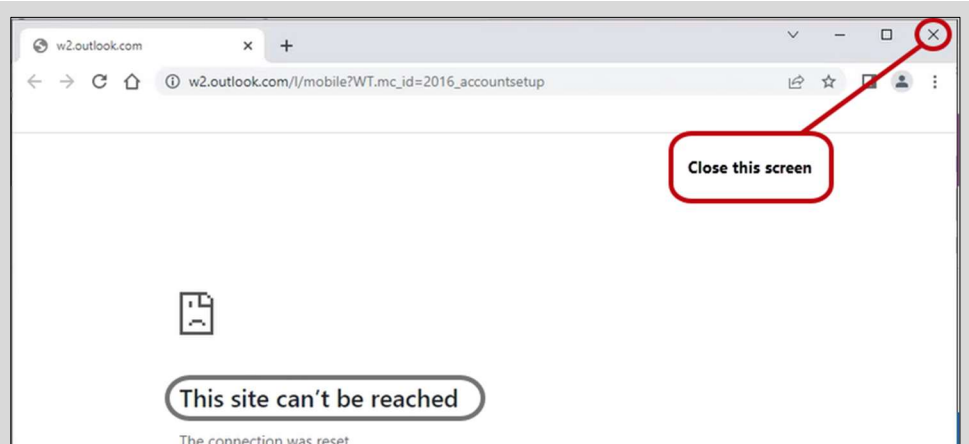
☐ Set up Outlook Mobile on my phone, too

Add another account...

< Back **Finish** Cancel Help

IMPORTANT: If you do not uncheck the mobile set up check box, an error message displays stating **This site can't be reached**.

1. Close the window and continue to next steps



w2.outlook.com

w2.outlook.com//mobile?WT.mc_id=2016_accountsetup

This site can't be reached

The connection was reset.

Close this screen

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You now have access to email from within Citrix.

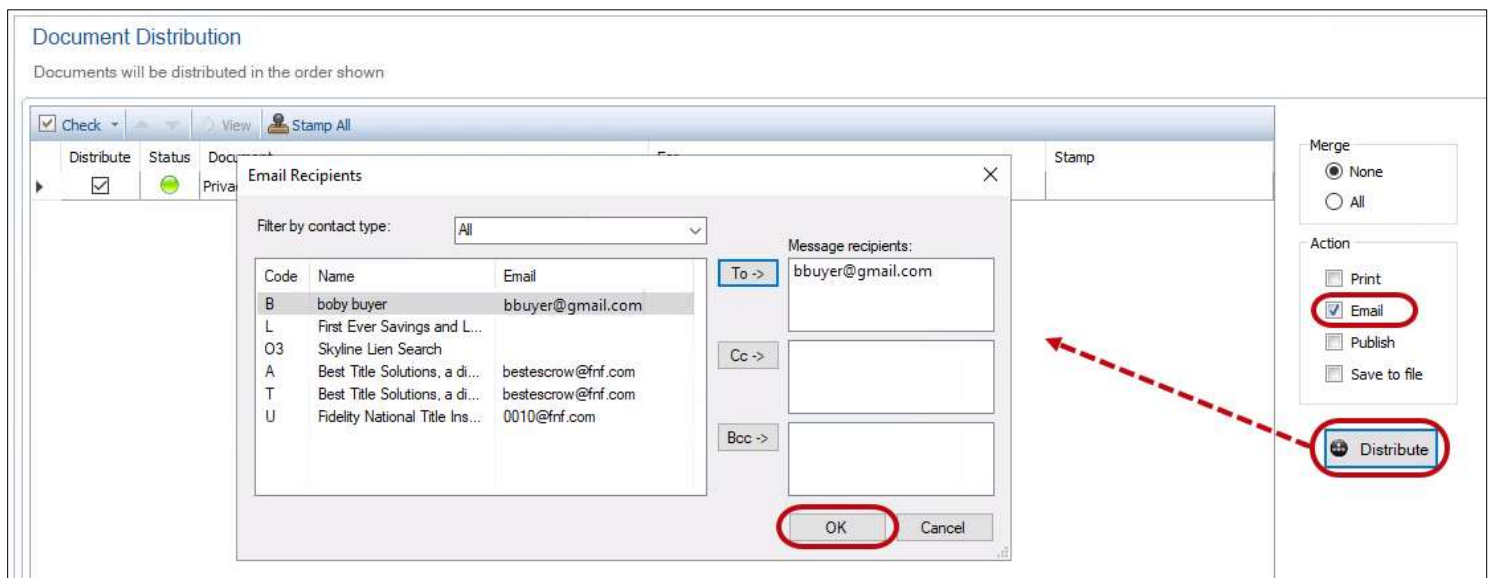
17. Navigate back to order you wish to email from

From the **Document Distribution** screen,

18. If not already checked, check the **Email** option
19. Click the **Distribute** button

From the **Email Recipients** window,

20. 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,

21. Compose your email as needed, add your signature line
22. Click **Send**

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

