



Submit Closing Protection Letter Orders in SoftPro 360® using Automation

Learn how to create Closing Protection Letter (CPL) orders using the AgentNet Automation feature in Softpro 360®. Use the optional Monitoring feature in SoftPro.

Initiate Submit Automation Process

The Submit process created in the automation wizard activates based on the status specified in the task created in the SoftPro order. Follow these steps to initiate the Submit Automation process.

Beginning from the SoftPro main screen:

1. Click **Order** tab
2. Click **Requested Tasks** tab
3. Select the applicable Task
4. Select **Status: 'Requested'**

The screenshot shows the SoftPro 360 interface. The 'Order' tab is selected (1). The 'Requested Tasks' tab is selected (2). The 'NC-CPL_Submit' task is selected (3). The 'Requested' status is selected from the dropdown (4).

Status	Task	Category	Occurs	Assigned To
Requested	Policy Upload		Post-closing	Sharon Evans-Scott
Requested	NC-CPL_Submit		Pre-closing	Sharon Evans-Scott

Occurs: ☒ Pre-closing ☐ Post-closing

Code: Task: Status: Assigned to:

Requested: Due: Via: Requested: By:

Fee: Fee: Line: Contact: Invoice:

5. Save and close your SoftPro order

NOTE: The automation will be initiated and can be monitored from the Monitoring Console. See [Monitoring Automation Progress](#) below.



Optional Monitor Automation Progress

1. Navigate to **SP Admin** tab



2. Click

3. In **Management Console** screen, double-click **Automation**

4. In the **Automation** folder, double-click **Monitoring**

Status	Process	Context	Triggered By	Triggered On
Running	Submit-CPL-NC	(AgentNet-Demo-UT) NC...	Pratik Mavani	1/16/2020 2:37:00 PM
Completed	Submit-CPL-NC	(AgentNet-Demo-UT) Pol...	Pratik Mavani	1/14/2020 8:25:00 PM
Completed	Submit-CPL-NC	(AgentNet-Demo-UT) Pol...	Pratik Mavani	1/14/2020 8:31:00 PM
Completed	Submit-CPL-IL	(AgentNet-Demo-UT) Pol...	Pratik Mavani	1/14/2020 3:30:00 PM
Completed	Submit-CPL-UT	(AgentNet-Demo-UT) Pol...	Pratik Mavani	1/14/2020 3:25:00 PM
Completed	Submit-CPL-IL	(AgentNet-Demo-UT) Pol...	Pratik Mavani	1/14/2020 3:15:00 PM
Completed	Submit-CPL-IL	(AgentNet-Demo-UT) Pol...	Pratik Mavani	1/14/2020 3:04:00 PM

NOTE: The status will reflect as 'Completed' if the process is finished successfully without errors.