Agent TRAX- CPL Automation User Guide

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Introduction

The current Agent Trax integration with SoftPro 360 provides SoftPro users the ability to seamlessly order and receive Agent Trax products eliminating the need to retype data. Users now have the ability to leverage Select Automation, allowing for an even more efficient workflow by reducing or eliminating the need to manually submit and accept Agent Trax transactions for CPL creation.

How to Connect

In order to create 360 automated processes, you must configure information regarding the Select Server. The manager is found under the **SPAdmin > Management Console > Server > Properties.** To access the dialog, right click on the Server or highlight the server and click the Properties button:

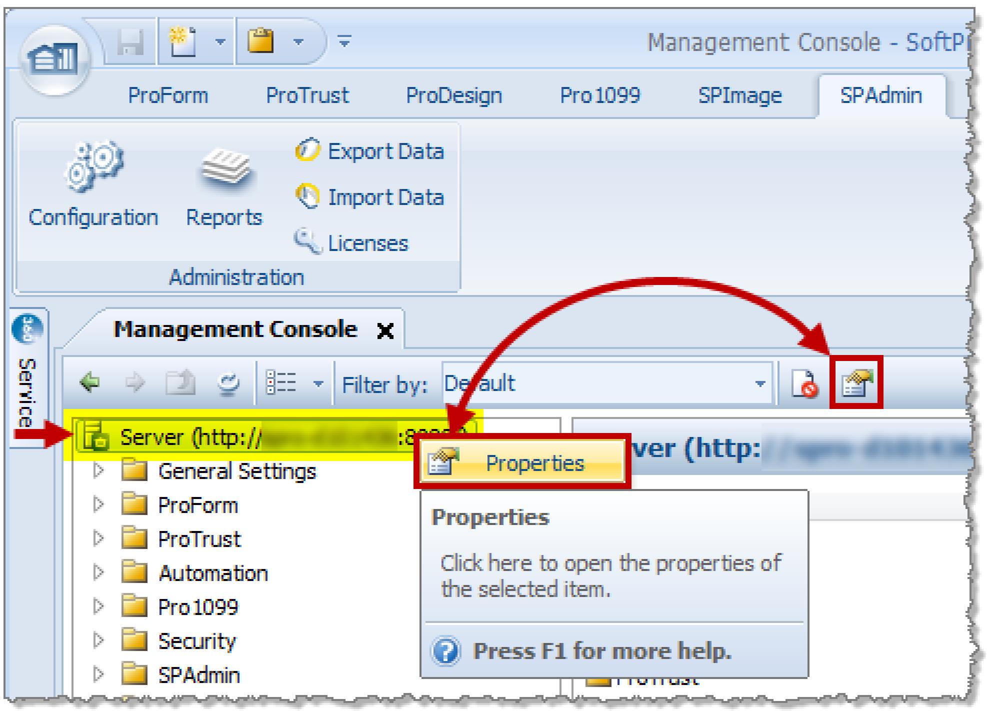

Figure 1 – Accessing SoftPro Select Server Manager

The SoftPro 360 tab is used to connect Select to the SoftPro 360 Server. By setting up this connection, users will be able to then create 360-based automated processes.

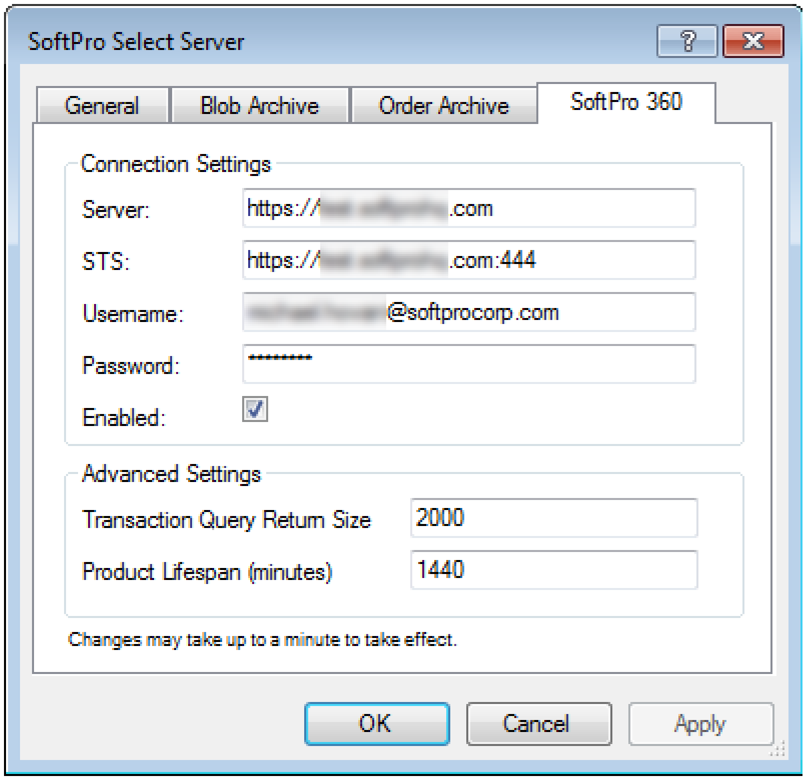

Figure 2 – SoftPro Select Server Manager: SoftPro 360 Tab

Connection Settings

- **Server:** Address of the SoftPro 360 production server; it should not be changed.
- **STS:** Address of the SoftPro 360 Security Token Service; it should not be changed.
- **Username:** User account that 360 will use to run automation processes should be input here.
- **Password:** Password for the user input in the field above should be input here.
- **Enabled:** Controls whether or not the 360 mid-tier server package is enabled or not. There are three basic states that can be in force here:
    1. **Unchecked (Default):** When first accessing and configuring, this box will be unchecked.
        - **360 transaction synchronization will not run.** 360 transactions will not be downloaded from the 360 server. 360 transaction changes will not trigger automation processes.
        - **360 automation components will not run.** Automation process conditions that involve 360 transactions will not work. Processes that run 360 products as automation actions will not execute.
    2. **Checked:** This must be done manually during the configuration process.
        - **360 transaction synchronization will run.** The process that downloads 360 transactions from the 360 server will be able to run; 360 transaction changes will be able to trigger automation processes.

- **360 automation components will run.** Automation process conditions that involve 360 transactions will be able to run; processes that run 360 products as automation actions will be able to execute.

3. **Checked to Unchecked:** Manually unchecking this box does not fully disable all processes.
   - **360 transaction synchronization stop running.** There may be a delay of about a minute before transaction synchronization stops.
   - **360 automation components may continue to run.** Certain automation processes are run independently from Select and therefore may continue to run after unchecking the box. There are two ways to stop automation components from running:
     - Access the process under the Automation folder in SPAdmin and disable the process.
     - Restart the Select mid-tier server (Not recommended).

Advanced Settings

- **Transaction Query Return Size:** This property controls the number of 360 Transactions that can be downloaded to each query window as a part of the 360 Transaction Synchronization process. This occurs every 15 seconds; the maximum accepted value is 2000.
- **Product Lifespan (minutes):** SoftPro 360 product files are downloaded and cached on the Select Server. The Product Lifespan property determines how often 360 checks for a new product version with the 360 core server. The default setting is 1440 minutes (1 day).

Getting Started

From **Select > SPAdmin > Configuration > Server > Automation folder > Processes folder**. This will open the Processes Management Console:

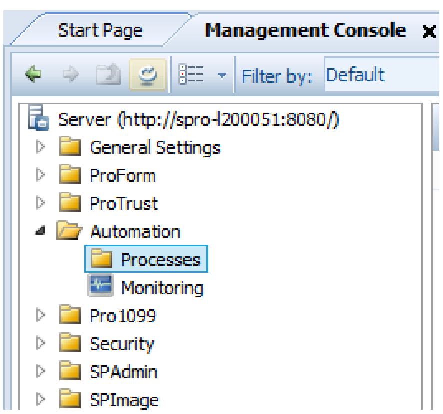

Figure 3 – SPAdmin Management Console

Access the Automation Process Wizard to set up a new process:

- Clicking the New Process button in the ribbon at the top of the screen,
- Right-clicking on the Processes folder and selecting New Process from the context menu, or

- Right-clicking in the Processes Pane at the right and selecting New Process from the context menu.

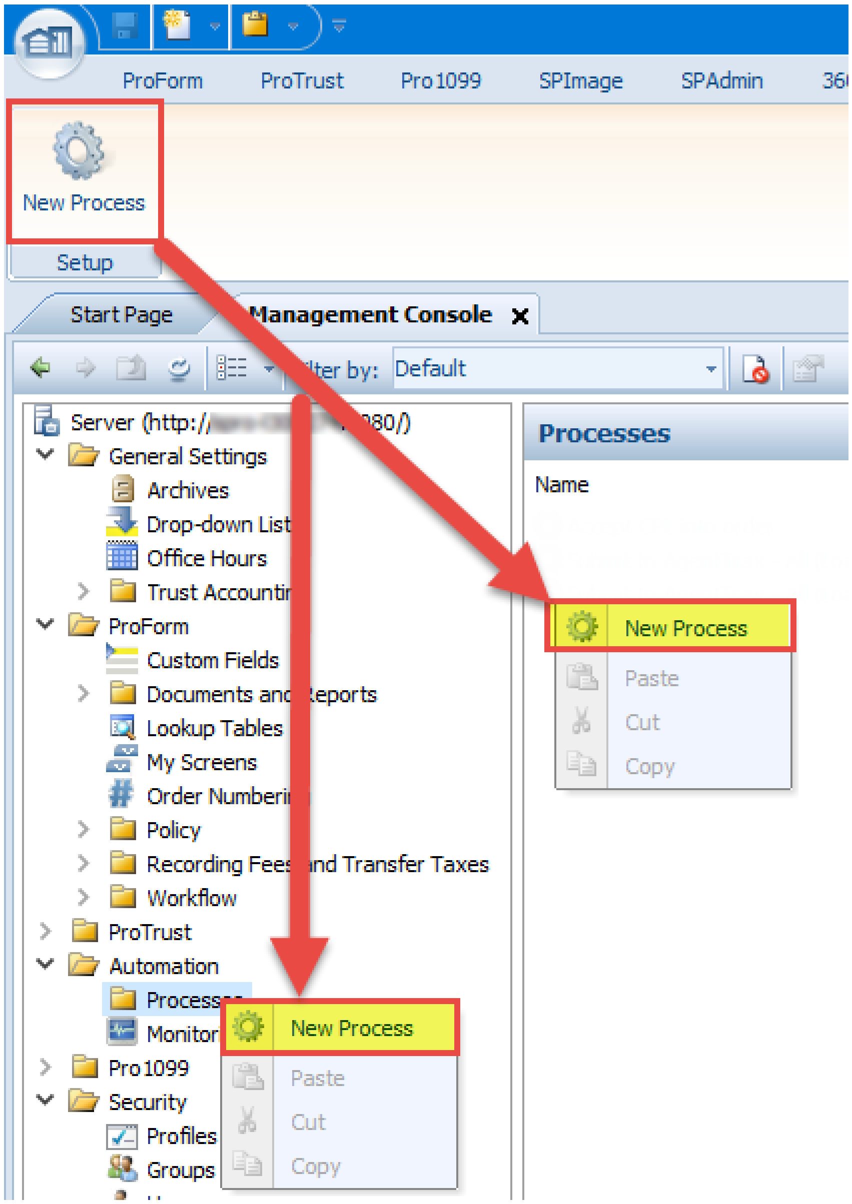

Figure 4 – Select Automation Create a New Process

Note: Please see Select Automation User Guide for additional information on creating and monitoring automated processes.

Submit Process and Triggers

Once you click the New Process option, you will get a dialog to will walk you through the creation of a process. The steps below will outline the best practices for setting up a process and automatically request an Agent Trax CPL.

Step 1: When (Trigger)

The 'When' screen is where you set the trigger that will start the process. It is recommended that you use the trigger of '**Task is added or updated**' when creating a submit process. Once you have completed this step, click **Next** to select the conditions.

Note: To create a new CPL you cannot select the '360 transaction is updated' since you have not yet created a 360 transaction.

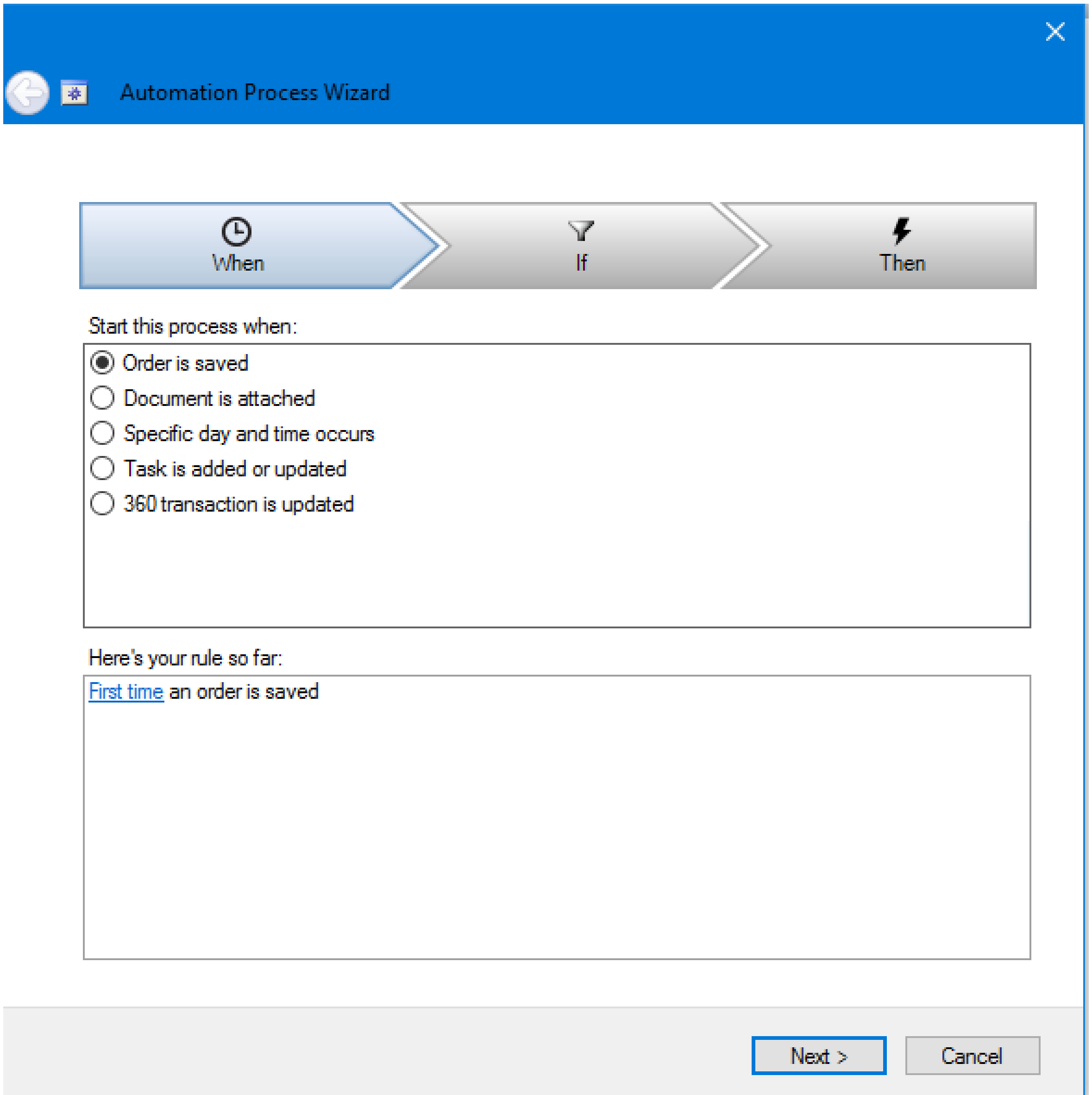

Figure 5 – Automation Process Wizard (Submit): When

Step 2: If (Conditions)

The 'If' screen is where you set the condition(s) you want to be in place for the process to start. Since you are using a trigger of '**Task is added or updated'** you want to add conditions that pertains to the task. In the example below, a condition for task name and task status is being added. You may select other conditions to apply to your rule. For example, if you only want the process to run on Title orders, you can select a condition for the order type and if you only want the process to run after a certain date, you can set a condition using the Order.CreatedDate field code.

Once you have selected all the conditions, click **Next** to choose your action(s).

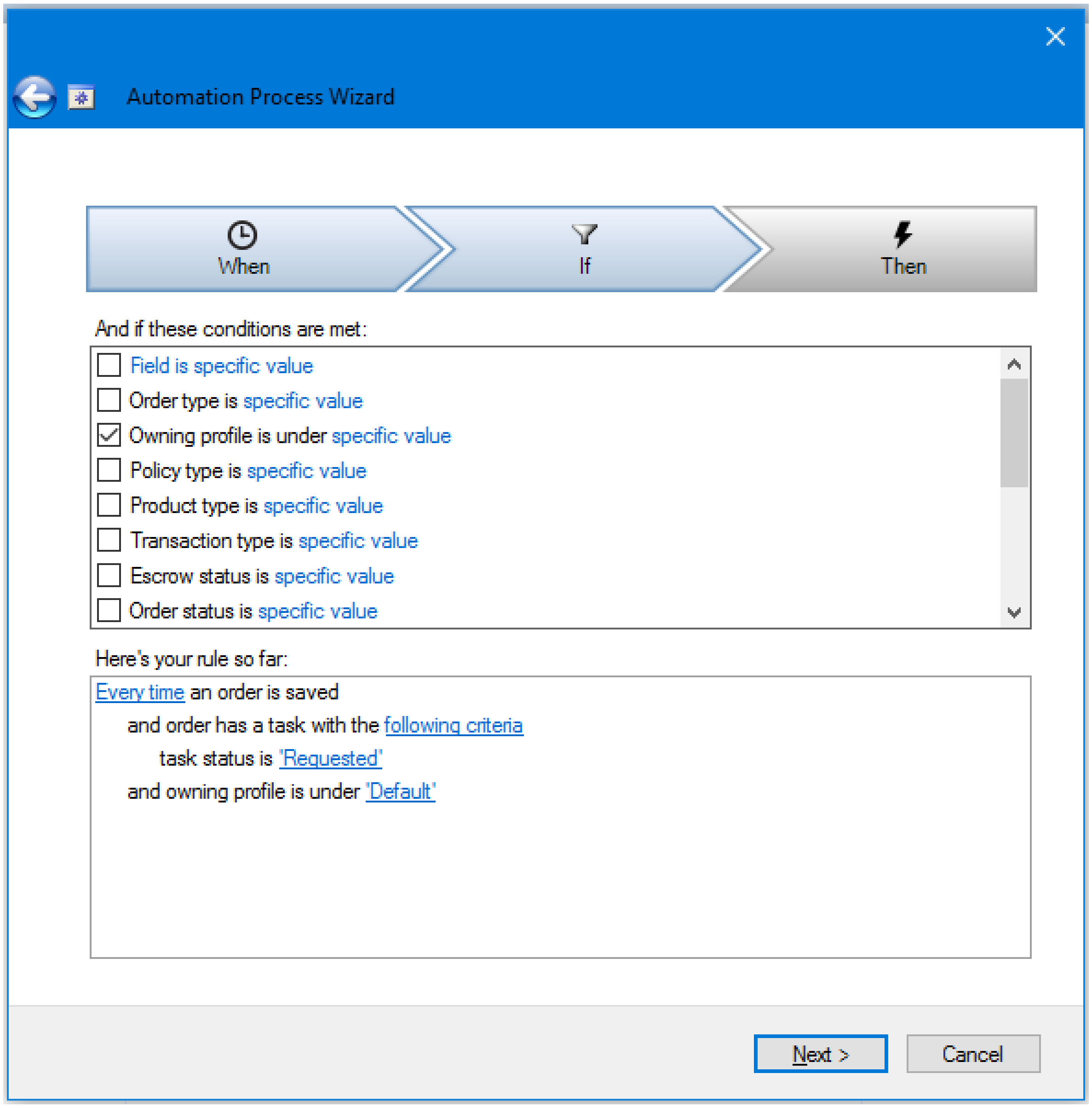

Figure 6 – Automation Process Wizard (Submit): If

Step 3: Then (Actions)

The 'Then' screen is where you set the action(s) you want to occur when the process is triggered and the conditions are met. To set up the action to order the new Agent Trax 360 order, select the 'Perform specific actions in an order' and then 'Perform a specific 360 action'. Once selected, click the ‘specific’ hyperlink to select the action settings. Once the following selections are made, click OK to return to the ‘Then’ screen.

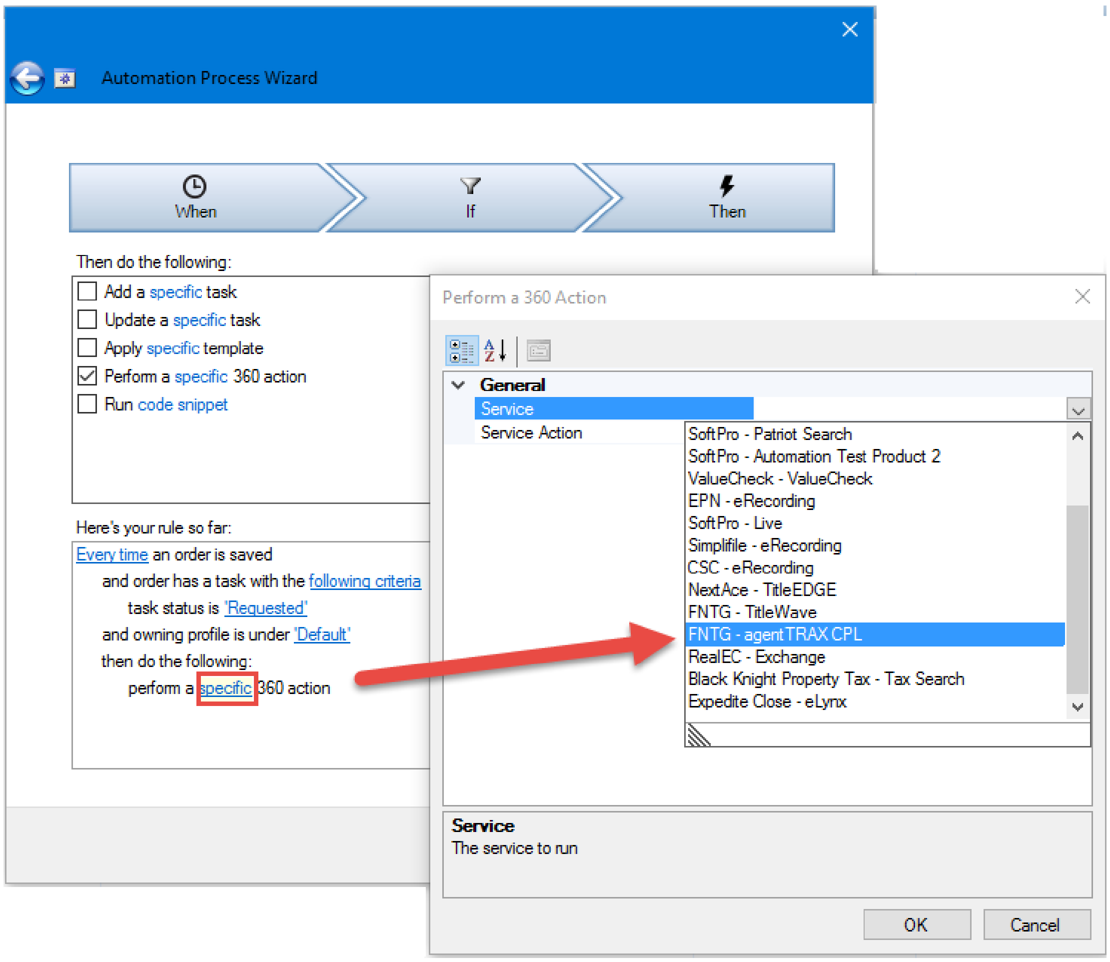

Figure 7 – Automation Process Wizard (Submit): Then

Perform a 360 Action Submit Settings

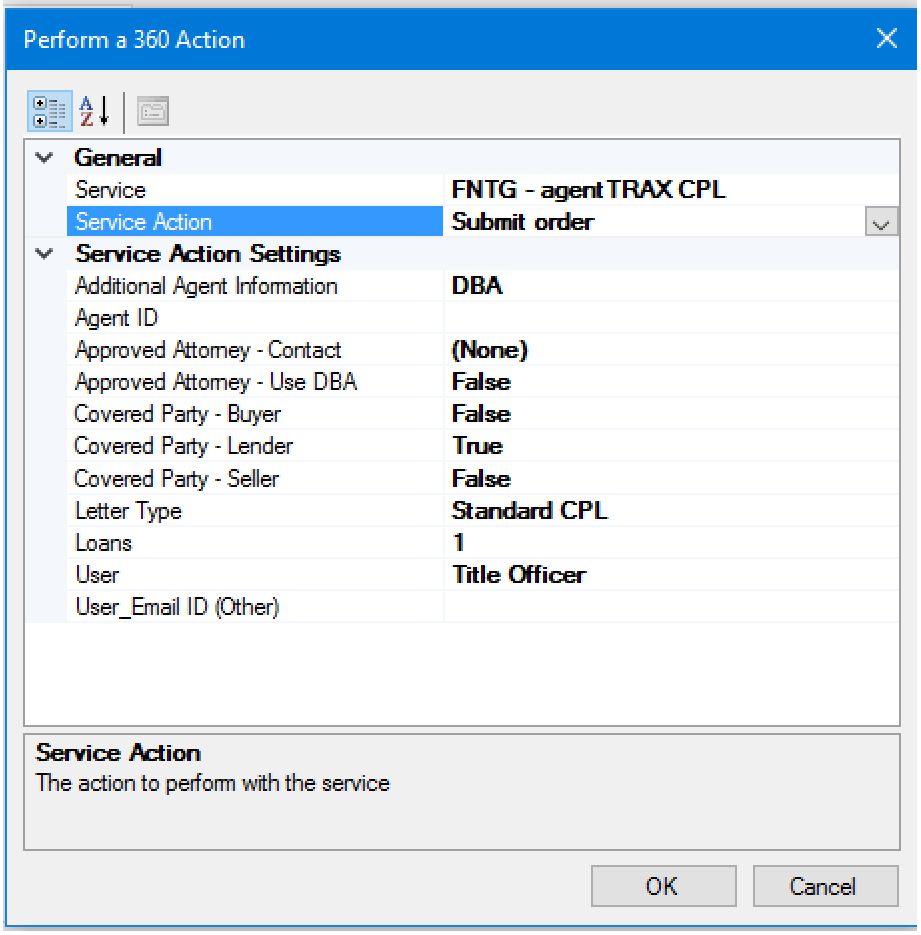

Figure 8 – Perform a 360 Action Submit Settings (Submit)

(New) General Settings

Service

- (NEW) Select FNTG – AgentTrax CPL

Service Action

- Submit order

Service Action Settings

Additional Agent Information

- Type: Dropdown
- Values: DBA, Legal Name, Both
- Select the applicable Additional Agent option to be printed on the CPL

Example: States SC & TX displays this option in the manual product of AgentTrax.

Agent ID

- Type: Text
- Option 1: Agent Trax Agent ID
- Option 2: Reference the Agency ID field on the Underwriter screen in the order **{{Order.Underwriters[0].AgencyID}}** This will pull the ID entered in the Agency ID field on the first Underwriter Contact.
- Option 3: Reference another field in the order: **{{Select Field Code}}** This will pull the ID entered in a specific field in the ProForm order.
  NOTE: Agent ID is setup by AgentTrax location representatives. The format is the full C.L.U.P. "Customer.Location.Underwriter.Property State" (e.g. XXXX.X.XX.XX)

Approved Attorney – Contact

- Type: Dropdown
- Values: None, Attorney, Escrow Company, Settlement Agent, Title Company
- Description: Select a contact type from the dropdown to use for Approved Attorney on the CPL. Automation will reference the first available contact in the order.

Approved Attorney – Use DBA

- Type: Boolean
- Description: Select true or false to use DBA "Doing Business As" for the Approved Attorney contact (false is selected by default). When Agent Trax supplies a DBA option for the Approved Attorney referenced in the order then automation will automatically use DBA when "True" is selected other no DBA is used. *Note: If Agent Trax does not have a DBA option for the referenced Approved Attorney in the order the CPL is still be created regardless of the values selected.*

Covered Party - Buyer

- Type: Boolean
- Select true or false to use the Buyer as the covered party type for the selected CPL letter type (***false*** is selected by default)

Covered Party - Lender

- Type: Boolean
- Select true or false to use the Lender as the covered party type for the selected CPL letter type (***true*** is selected by default). NOTE: If the Lender contact is not associated to a Loan, the 360 transaction may be rejected when requesting a "Standard CPL" letter type. If "Agent in Good Standing" letter is requested then the Lender association is not required and transaction should not reject (see Letter Type setting, below).

Covered Party - Seller

- Type: Boolean
- Select true or false to use the Seller as the covered party type for the selected CPL letter type (***false*** is selected by default) *<u>Example:</u> the state of TN has a Seller Covered Party option*

Letter Type

- Type: Dropdown
- Values: Standard CPL, Agent in Good Standing
- Select the letter type to be ordered (Standard CPL is selected by default). NOTE: Agent in Good Standing letters do not require Lender information.

Loans

- Type: Dropdown
- Values: 1,2,3
- Select the loan instance to be submitted on the CPL. This will default with the first loan but you may select 1, 2 or 3. If the loan instance selected is not entered in the ProForm order, the 360 transaction may be rejected.

User

- Type: Dropdown
- Values: Title Officer, Escrow Officer, Select User, Other User
- Select the user email address to be submitted with the CPL request. This is a required field. The email that is submitted should be an email address for a user who has been set up with Agent Trax. If an invalid email is sent, your request may be rejected.
  - **Title Officer;** This will send the email address for the Title Officer selected in the ProForm order. If this option is selected and there is no Title Officer added to the order, your request may be rejected.
  - **Escrow Officer;** This will send the email address for the Escrow Officer selected in the ProForm order. If this option is selected and there is no Escrow Officer added to the order, your request may be rejected.
  - **Select User;** This will send the email address for the user who triggered the process. Note: If your process failed and you restart the process from the Monitor, the email of the person who restarted the process will be submitted. Note: If this option is selected, you must be on Select Version 4.3.6 or higher or you transaction will be rejected.
  - **Other User;** This allows you to enter an email address in the 'User Email ID (other)' field. If this option is selected and there is no email

address entered in the 'User Email ID (other)' field, your request may be rejected.

User Email ID (Other)

- Type: Text
- Enter an email address if 'Other User' is selected in the User field (above). This is only required when 'Other User' is selected and will only be sent when 'Other User' is selected.

Accept Process and Triggers

Once you click the New Process option, you will get a dialog which will walk you through the creation of a process. The steps below will outline the best practices for setting up a process and automatically accepting an Agent Trax CPL into the order (or submit to SmartView for FNF users).

Step 1: When (Trigger)

The 'When' screen is where you set the trigger that will start the process. The trigger for accepting Agent Trax data and documents is '360 transaction is updated'. Click the hyperlink in the rule pane and select 'FNTG – agent Trax CPL'. When you have completed this step, click Next to select the conditions.

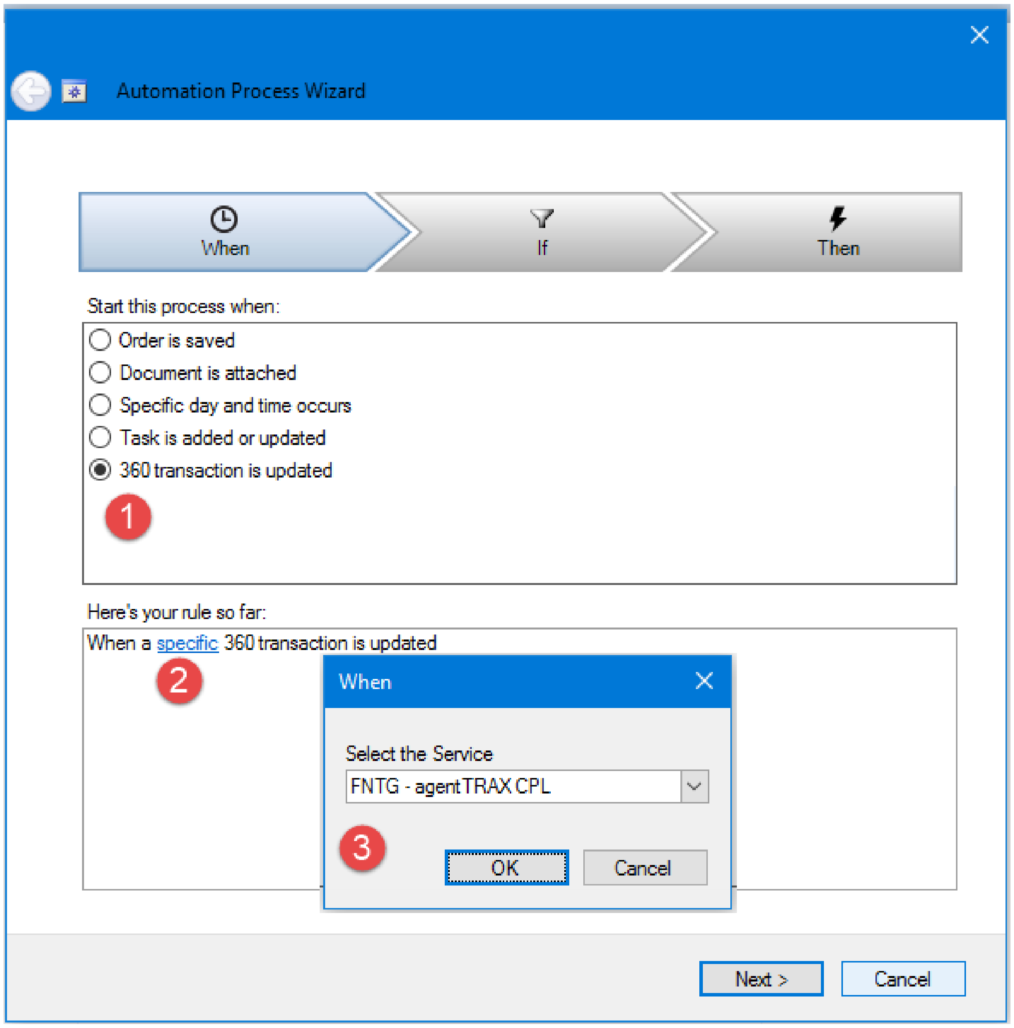

Figure 9 – Automation Process Wizard (Accept): When

Step 2: If (Conditions)

The 'If' screen is where you set the condition(s) you want to be in place for the process to start. Since the SoftPro 360 transaction status is set to 'Ready' when the data and documents are returned from Agent Trax, you will need to select the '360 transaction status is specific value' condition. Click the 'specific value' hyperlink in the rule pane and select 'Ready'. You may select other conditions to apply to your rule. For example, you may select '360 transaction product contains specific value' if you have different actions for different products.

Once you have selected all the conditions, click Next to choose your action(s).

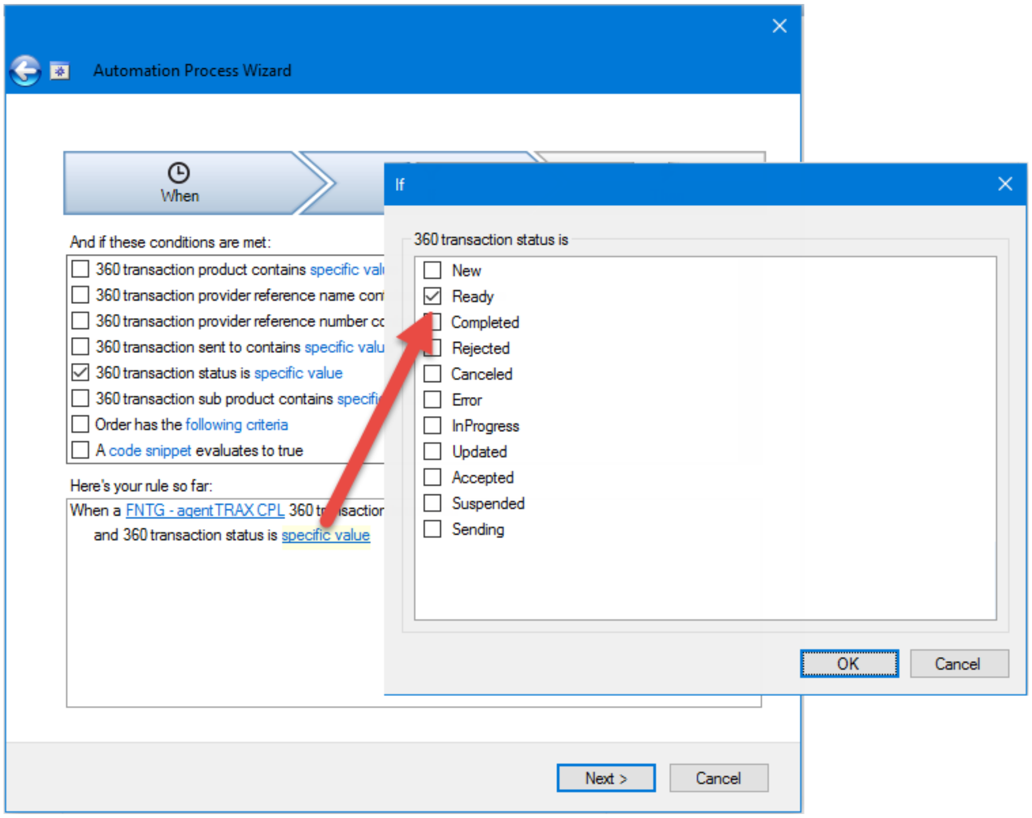

Figure 10 – Automation Process Wizard (Accept): If

Step 3: Then (Actions)

The 'Then' screen is where you set the action(s) you want to occur when the process is triggered and the conditions are met. To set up the action to accept the 360 transaction, select the 'Perform a specific 360 action'. Once selected, click the 'specific' hyperlink to select the action settings. Once the selections seen below are made, click OK to return to the 'Then' screen.

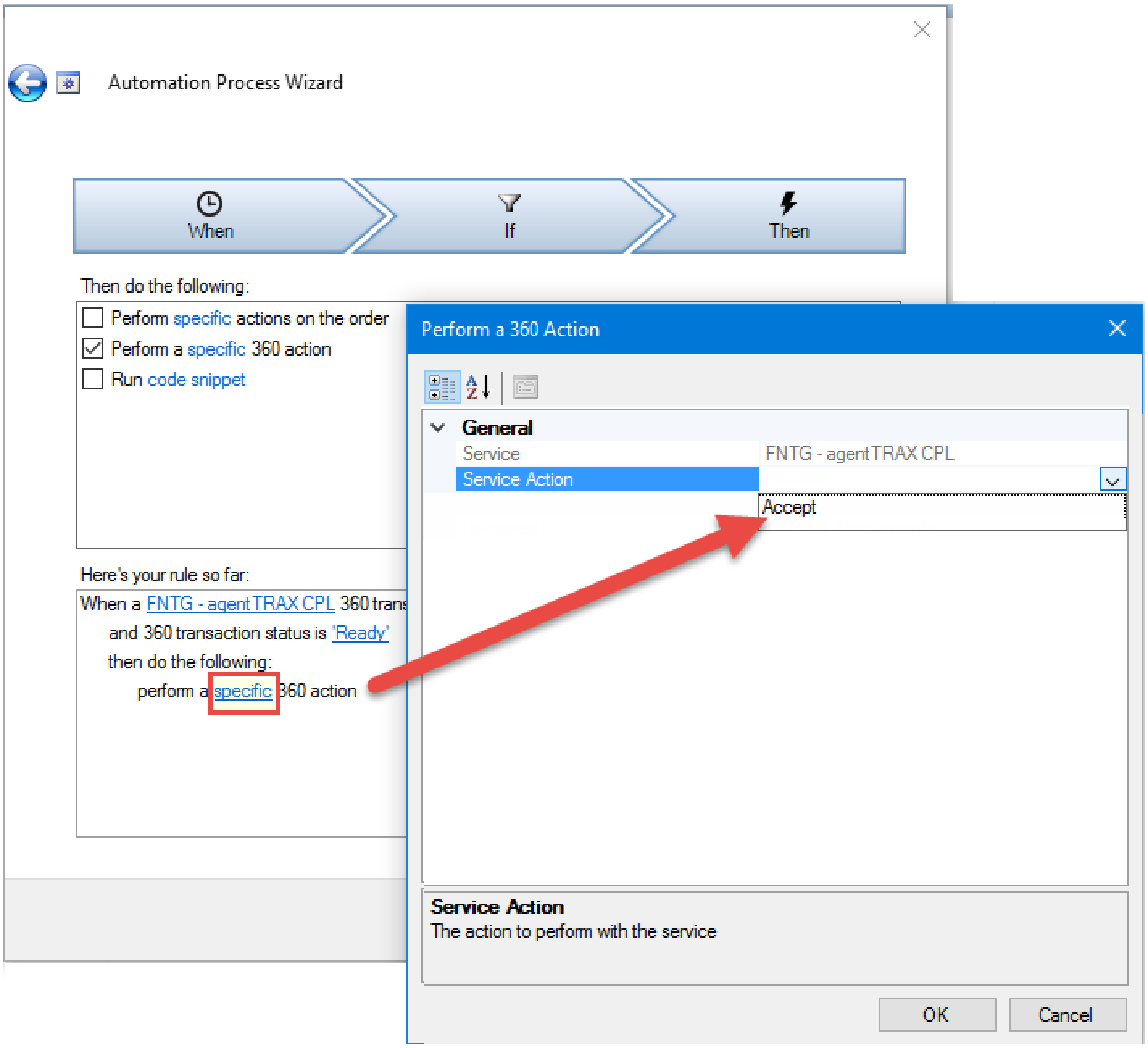

Figure 11 – Automation Process Wizard (Accept): Then

Perform a 360 Action Accept Settings

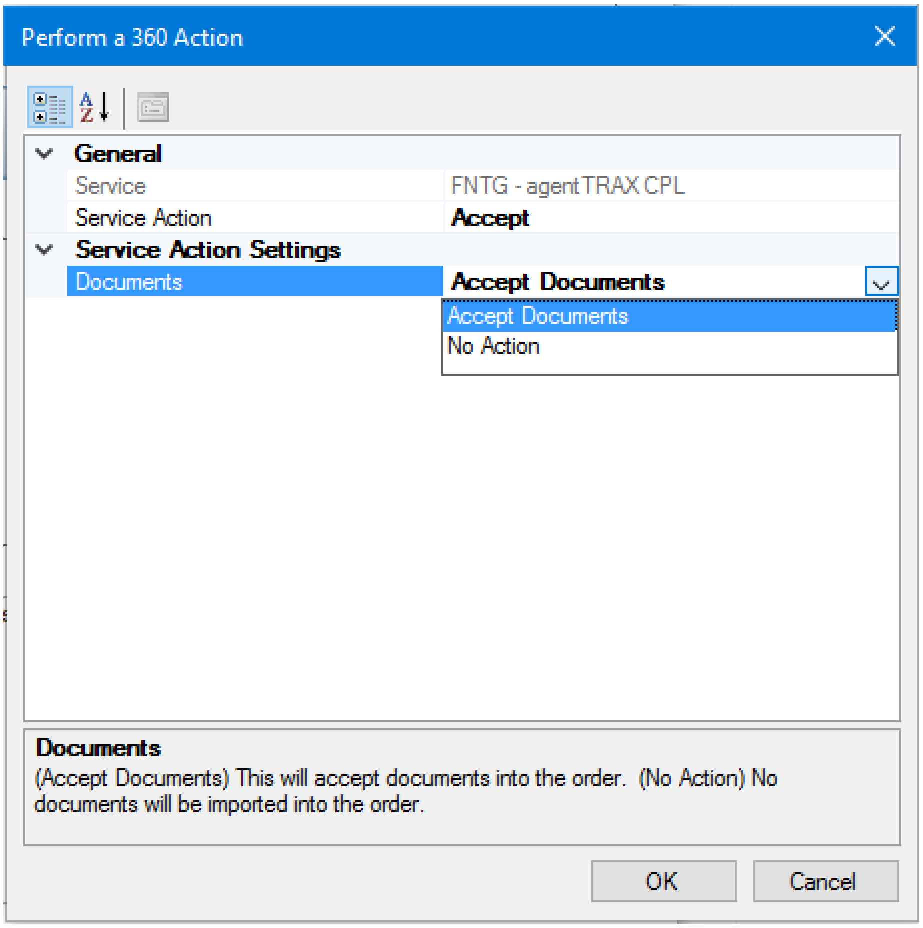

Figure 12 – Perform a 360 Action Submit Settings (Accept)

(NEW) General Settings:

Service

- (NEW) FNTG – AgentTrax CPL *(defaulted and cannot be changed)*

Service Action

- Accept

Service Action Settings:

Documents

- Type: Dropdown
- Values: Accept Documents, No Action
  - Accept Documents - This option will add the documents into your order.
  - No Action - This option will not add the documents into your order.