

# Black Knight - SoftPro360 Integration (v1.4)

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# Introduction

Black Knight's Municipal Lien Search provides a solution to easily reveal these liens. With access to a vast amount of property and tax data – more than what is available to title agents in a traditional online search – our Municipal Lien Search can quickly identify unrecorded liens on properties across the U.S.

The integration between Black Knight and SoftPro360 will provide users the ability to seamlessly place orders for their products/services and to receive the results of those searches within 360.

# Launching Black Knight

## Access from 360 Services Menu

From the **360 Services** menu, you can access **Black Knight – Municipal Lien Search** located under the **Title Services** folder.

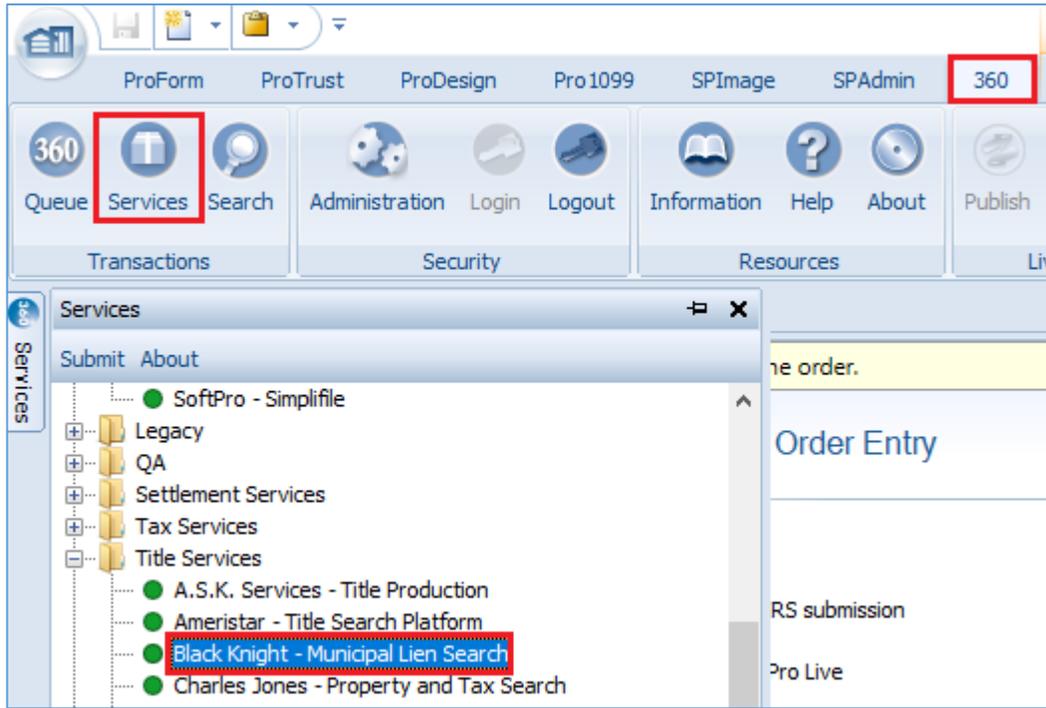


Figure 1: Black Knight launch screen in 360 Services

## Order Linking

360 will automatically link to an active order which is open on SoftPro Select. If no active orders are present, then go to **Start Page** to open an existing order or create a new order. The linked order must have the below mentioned details:

1. Add at-least one Property having Property Address, City, County, Zip and Parcel ID.
2. Include at-least one buyer (with name) and one seller (with name) details.

Property address:	<input type="text" value="2133, Los Robles"/>	
	<input type="text"/>	
City:	<input type="text" value="Pensacola"/>	State: <input type="text" value="FL"/> <input type="text" value="v"/>
	Zip Code: <input type="text" value="32003-"/>	<input type="checkbox"/> Foreign
In the:	<input type="text" value="County"/> <input type="text" value="v"/>	of <input type="text" value="Bradford"/> County GLC: <input type="text"/>
APN/Parcel ID:	<input type="text" value="8675309"/>	Tax/Map ID: <input type="text" value="*"/>

**Figure 2: SoftPro Property Details**

Order Contacts						
Type	Name	Code	Phone	Fax	Main Contact	Email
Buyer/Borrower	Mark	B	(900)318-2406		Mark	mark.mccafry@fnf.com
HOA	Pearson Spectre	HOA				
Seller	Jack	S	(700)298-6532		Jack	jack.john@fnf.com

**Figure 3: SoftPro Order Contacts**

## Welcome Screen

The **Welcome** screen provides a summary of the Black Knight-360 integration product and its contact information.

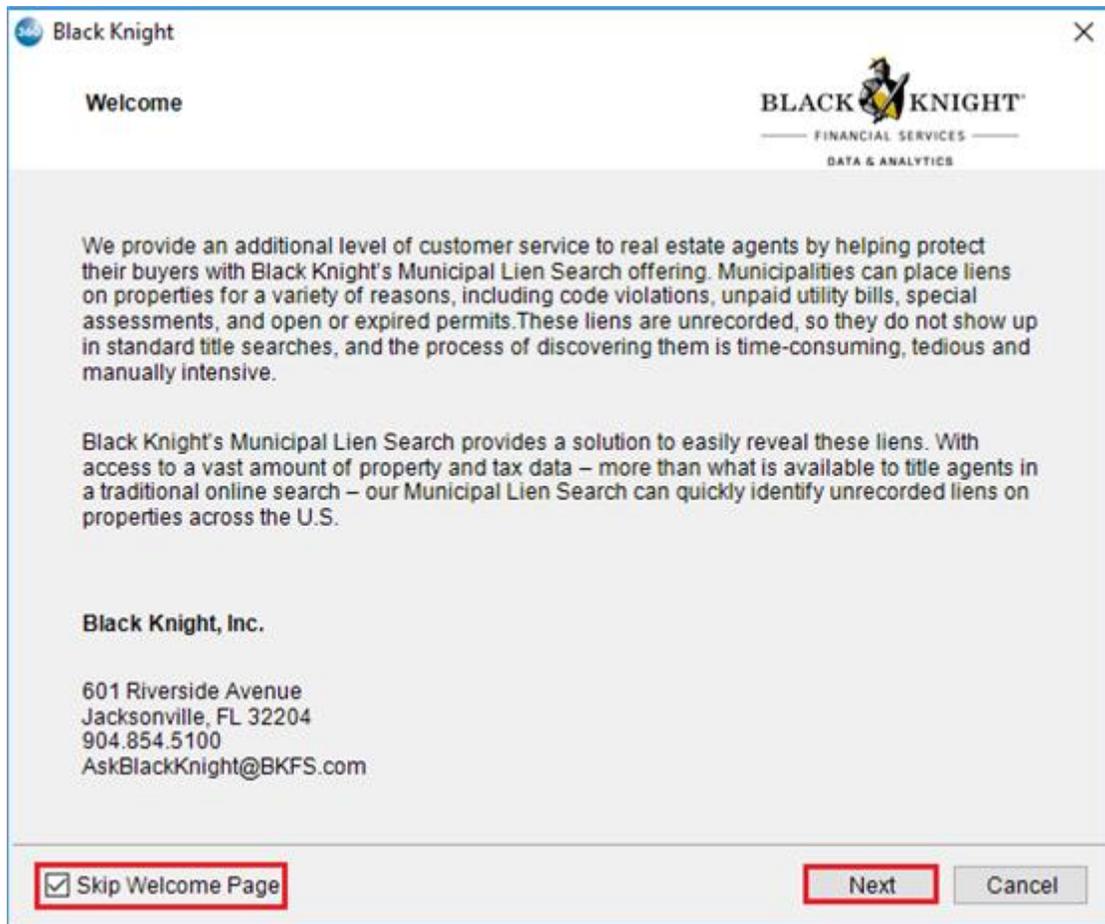


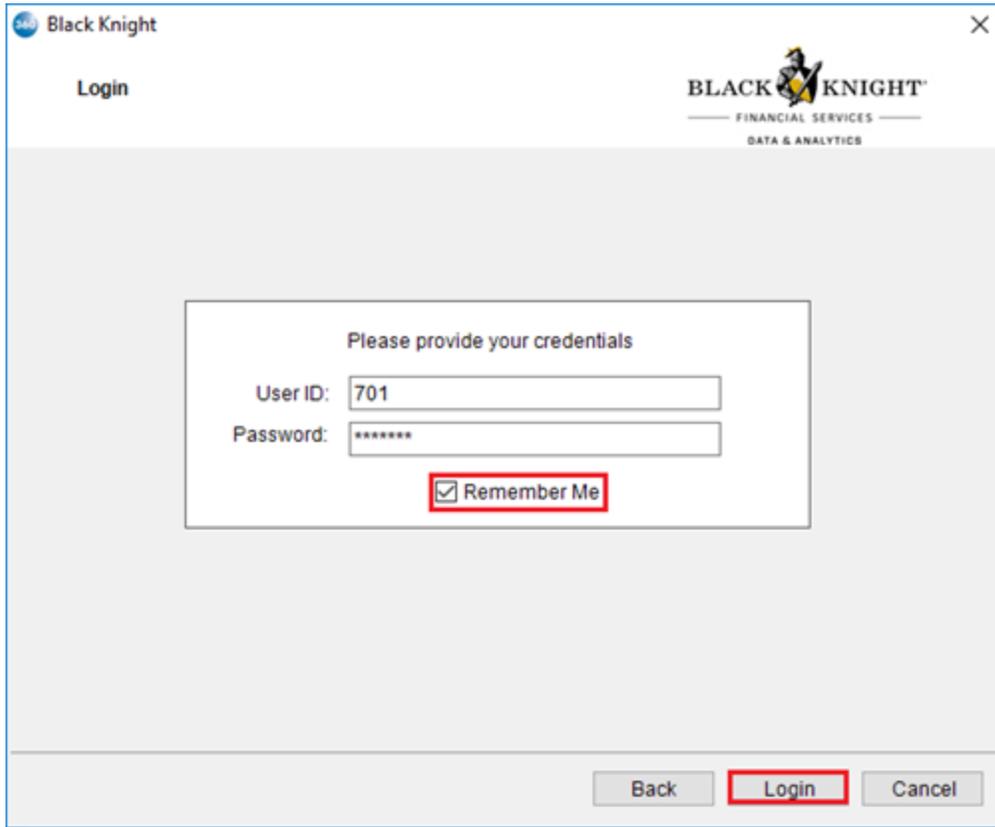
Figure 4: Welcome Screen

- Click on **Next** to navigate to the **Login** screen.
- Click on the **Skip Welcome Page** checkbox to bypass this screen for future logins.

## Login Screen

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The **Login** screen will need you to enter your User ID and Password.



*Figure 5: Login Screen for Black Knight*

- Click on **Login** to continue to the **Property & Product** screen.
- Check on the **Remember Me** checkbox to get auto-logged in the future instances.

# Submit to Black Knight

## Product Selection Screen

**Product Selection** screen will allow you to view and select the property address and request any product(s) from Black Knight. You can also include notes and documents in your request to Black Knight.

- ✚ **Property Selection:** Displays properties listed in your ProForm order. You can select the property for which you want to order product(s) from Black Knight.
- ✚ **Product Selection:** Allows you to select the product(s) that you want to order from Black Knight.
- ✚ **Notes:** It is a free text field. You will be able to include supporting notes along with the product request to Black Knight. Click **Add to ProForm Notes** if you want to save the notes information back to your ProForm order.

*Figure 6: Property & Product Selection Screen*

- ✚ **Back:** You will be able to go back to the Login screen.
- ✚ **Submit:** You will be able to submit the request to Black Knight.
- ✚ **Cancel:** You will be able to close the product.

Click on **Order Information** link to view to the order contacts associated with the linked ProForm order (Figure 7).

### Order Information

The **Order Information** link label will display the order contacts associated with the linked ProForm order.

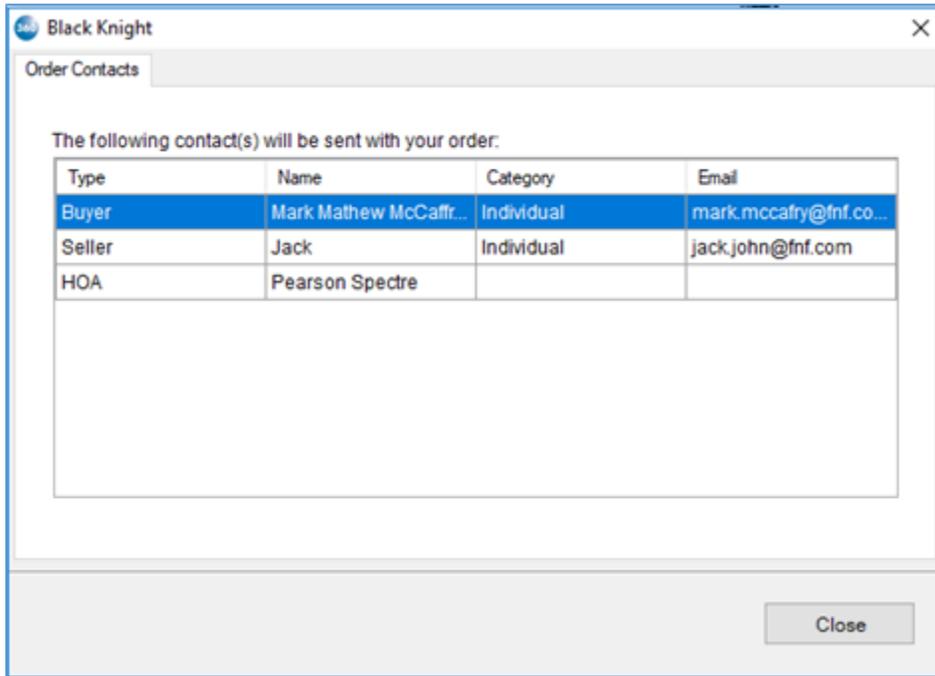
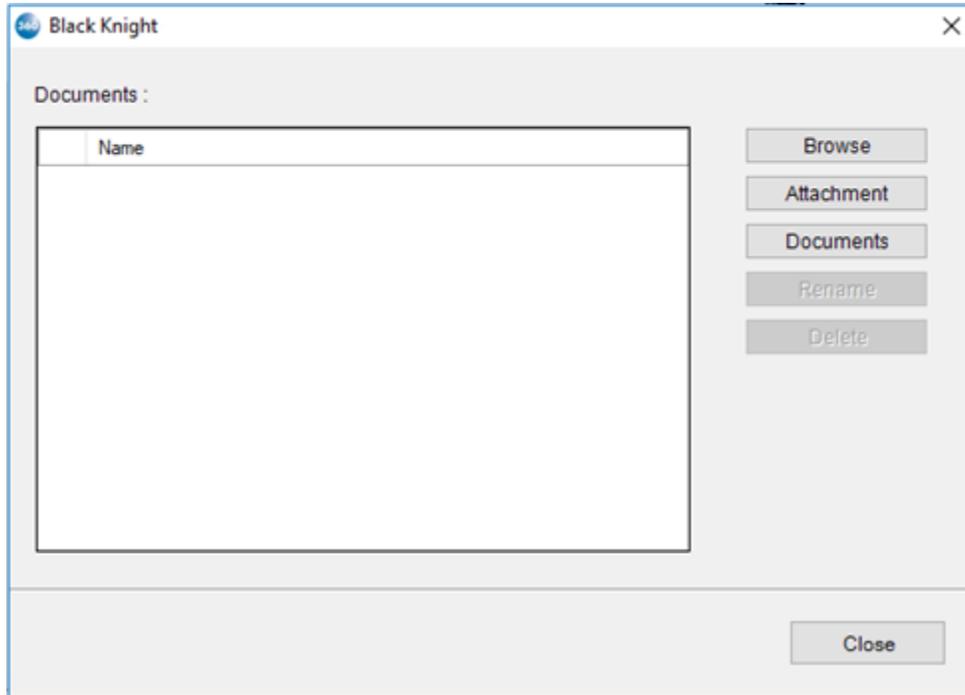


Figure 7: Order Contacts Screen

## Documents Screen

From the **Product Selection** screen, click on **Attach Documents** link to redirect to the **Documents** screen (Figure 8). In the **Documents** screen, you will be able to attach document(s) which will be included in your request to Black Knight

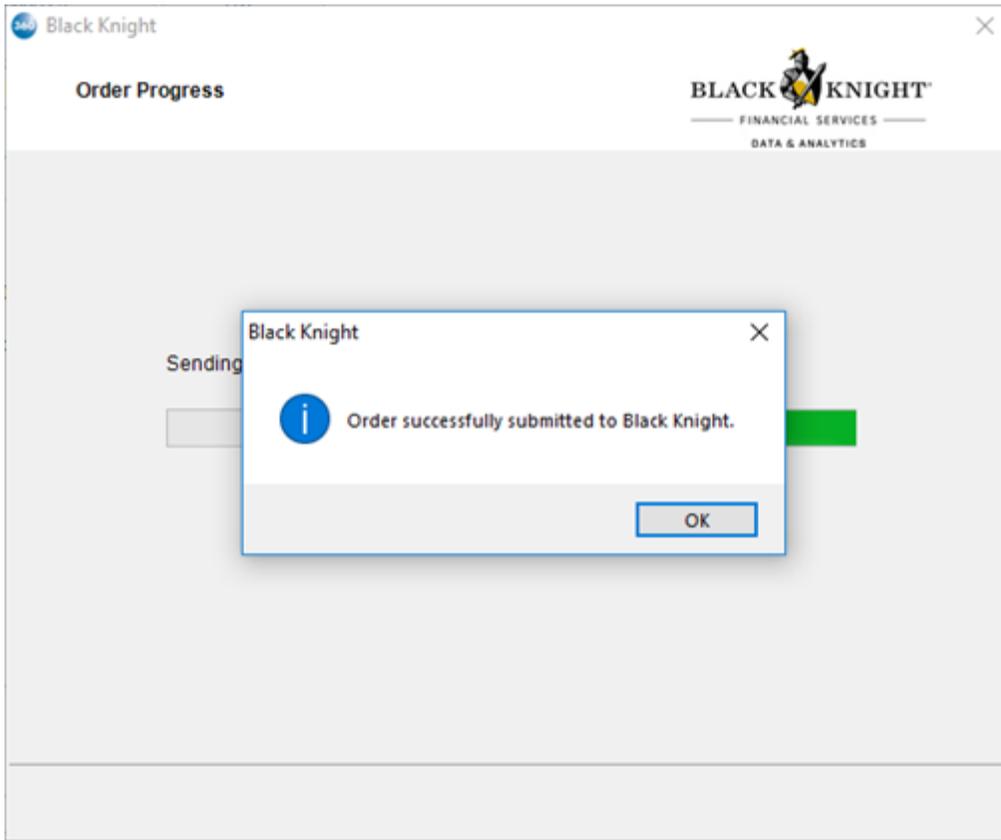


**Figure 8: Attachments Screen**

-  **Browse:** You will be able to browse and attach documents from their local system.
-  **Attachments:** You will be able to browse and attach any existing documents from your ProForm Attachments/smartVIEW folder.
-  **Rename:** You will be able to rename any attached document.
-  **Delete:** You will be able to delete any attached document if you do not want to include it in your request.

Click on **Close** button to return to the **Product Selection** Screen.

Click on **Submit** to send the order request to Black Knight. Upon successful submission, you will see the below confirmation message.

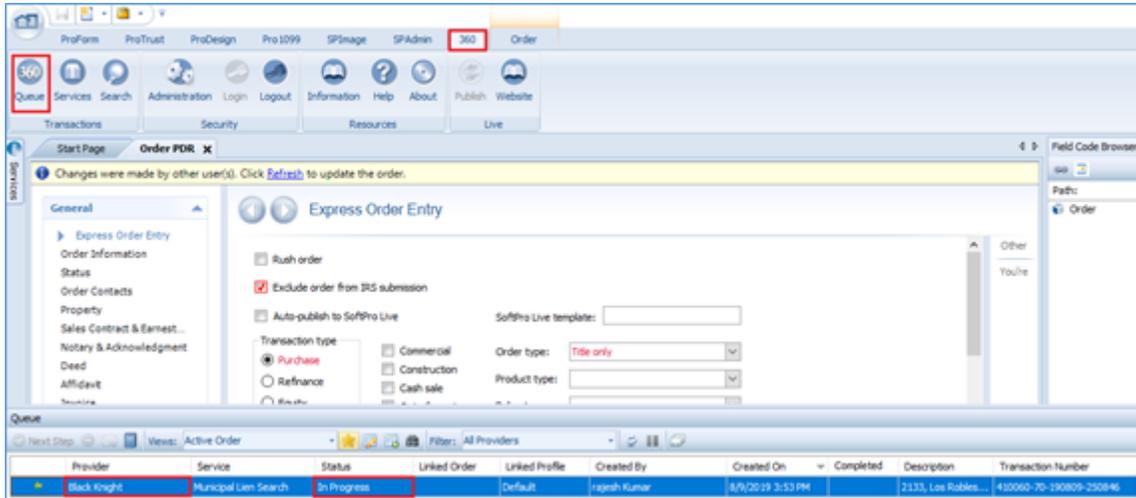


*Figure 9: Successful Submit operation message*

Click on **OK** to close the instance and check **360 Queue** for the status of the transaction.

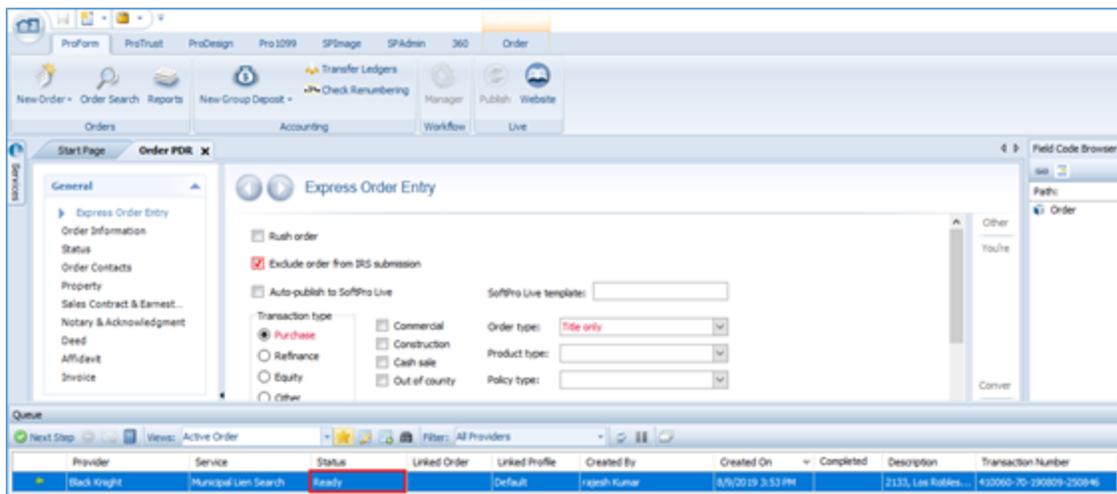
# 360 Queue

From the 360 tab, click on **360 Queue** button. SoftPro360 will display the submitted transactions in the queue, where the status will reflect as **InProgress** for a successful submit.



**Figure 10: 360 Queue 'InProgress' status for Black Knight**

When Black Knight remits back Documents, the transaction status will change to **Ready** and the **Next Step** button will be enabled.

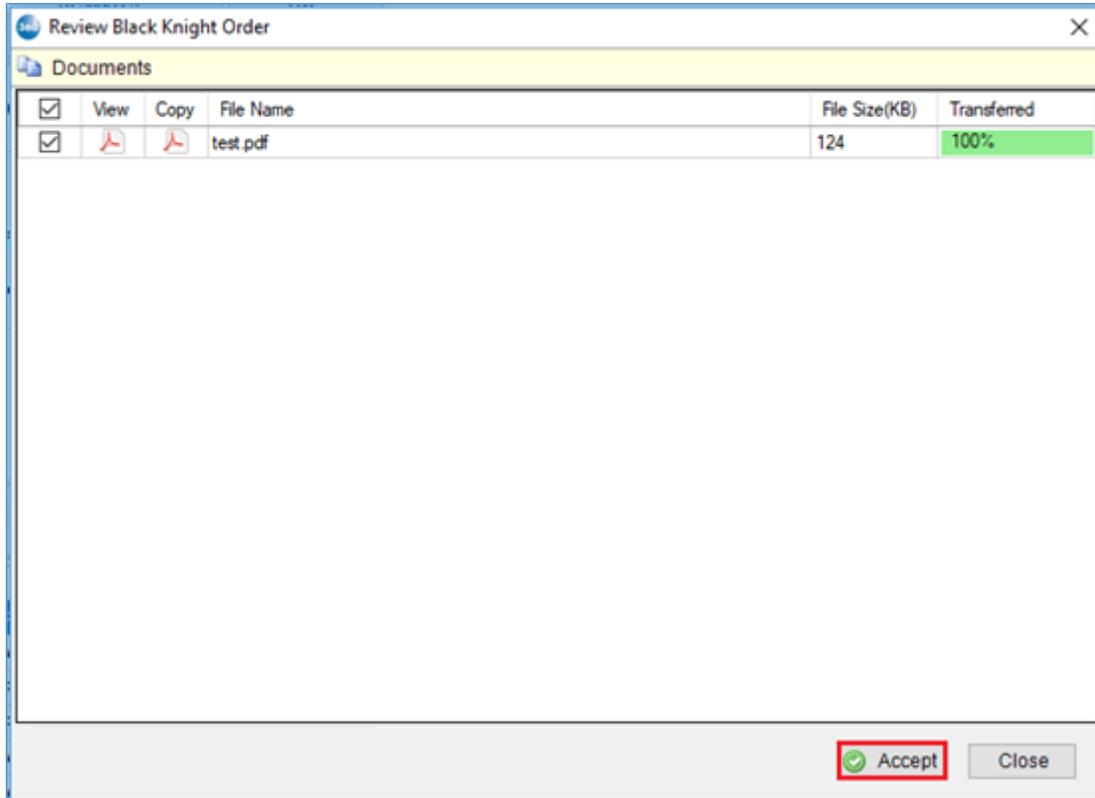


**Figure 11: 360 Queue 'Ready' status for Black Knight**

Click on **Next Step** button to navigate to the 360 review screen.

# 360 Review Screen

On the 360 **Review** screen, you will be able to review the document(s) sent by Black Knight and accept them back into your ProForm order.



*Figure 12: 360 'Review' screen for Black Knight*

## Documents Section

- Click on **View** to preview the document.
- Click on **Copy** to copy the document to your local system.
- Verify the document name as displayed under the **File Name** column.
- Click on **Accept** to import the document to your ProForm order or smartVIEW. Please note that the checkbox next to the document has to be checked in order to import the document successfully.

When document is accepted, the transaction status will change to **Accepted** in the 360 queue.

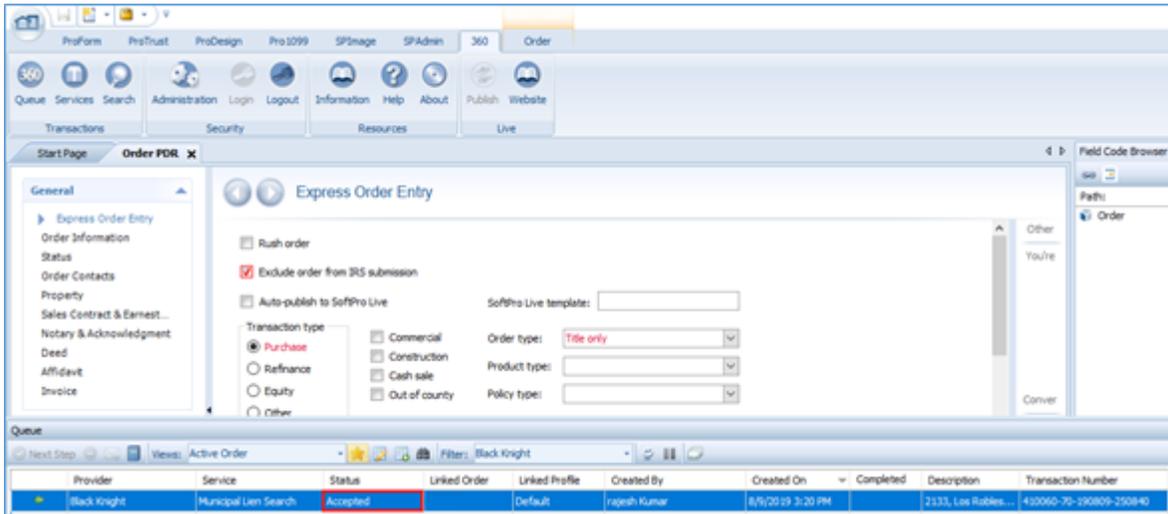


Figure 13: 360 Queue 'Accepted' status for Black Knight

The accepted documents will be saved in ProForm and will be visible under the **Attachments** section of the ProForm order (Figure 14).

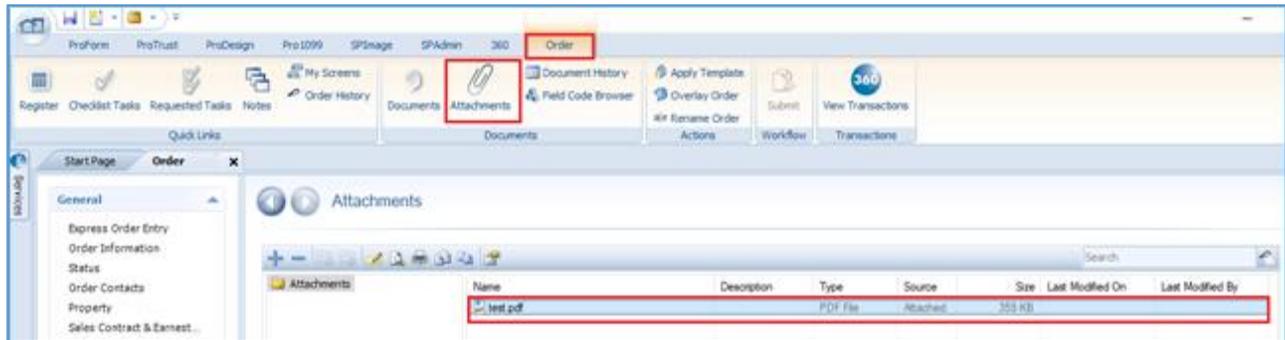


Figure 14: Order 'Attachments' section for ProForm order

After a period of 90 days, the transaction will expire and no further remits will be possible on the transaction. Hence, the transaction status will change to **Completed** in the 360 queue.

# Launching Black Knight Automation

## Create an automation process for Accept

Under **Automation** folder, click on **Processes** and in the blank space, right-click to initiate creating a new process for Accept.

Follow the steps stated in the Automation Process Wizard to create the Accept process:

### 1. When:

- Select the radio button **360 transaction is updated**.
- Select the **Black Knight – Municipal Lien, HOA, O and E Searches** from the dropdown.
- Click Next.

Automation Process Wizard

When If Then

Start this process when:

- Order is saved
- Document is attached
- Specific day and time occurs
- Task is added or updated
- 360 transaction is updated

Here's your rule so far:

When a [Black Knight - Municipal Lien Search](#) 360 transaction is updated

Next > Cancel

Figure 15 – Accept Process

2. If:

- a. 360 transaction status is **specific value**
  - i. Select the checkbox with status as **Ready**.
  - ii. Click OK to return to Automation Process Wizard.

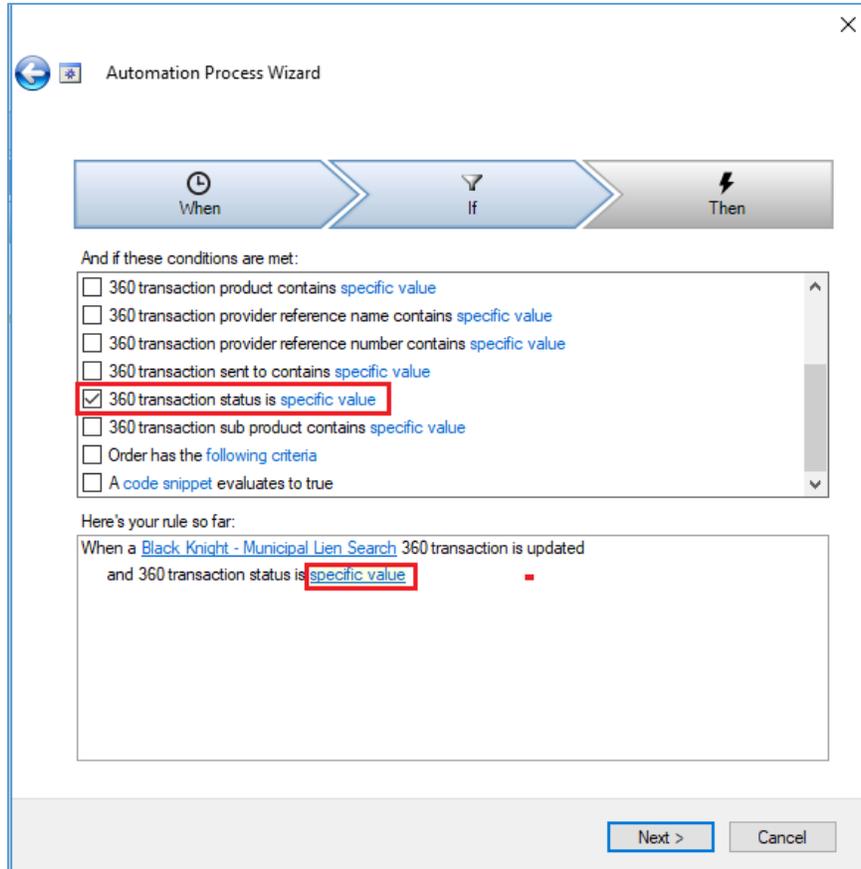


Figure 16 – Accept Process -> Specific Value

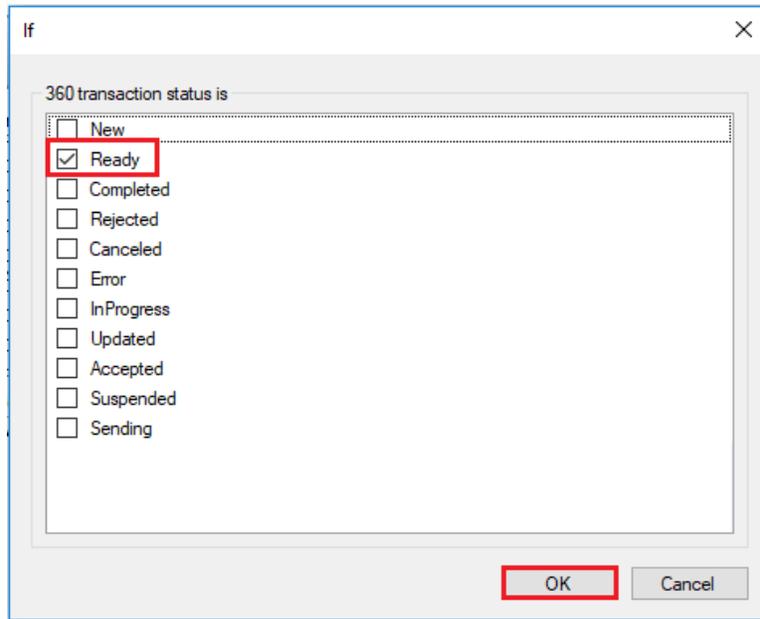


Figure 17 – Accept Process -> Select Status

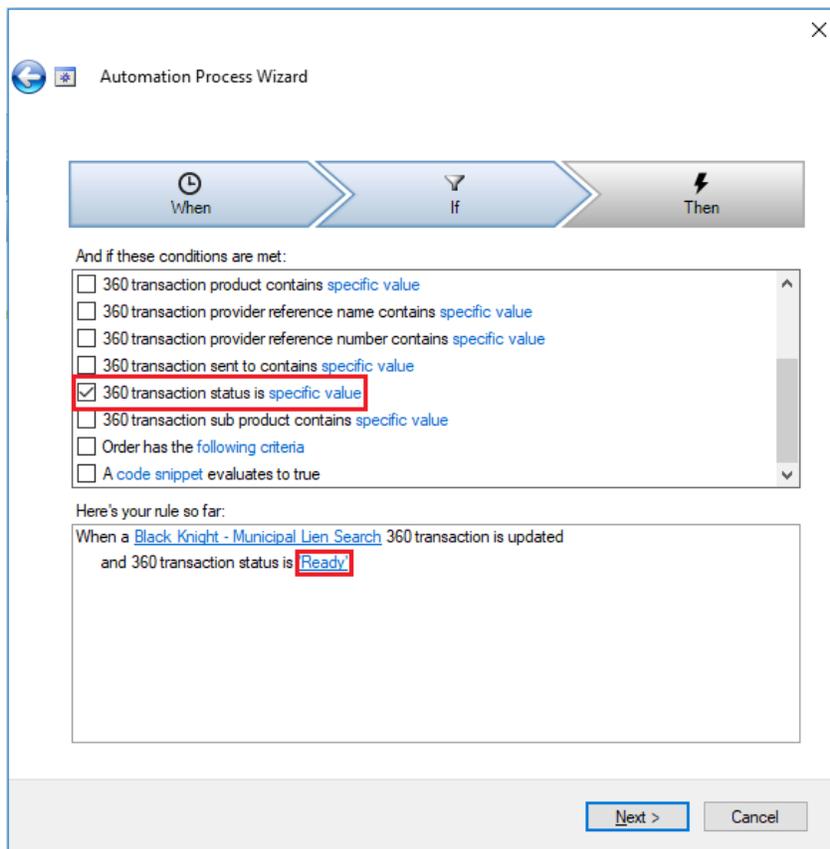
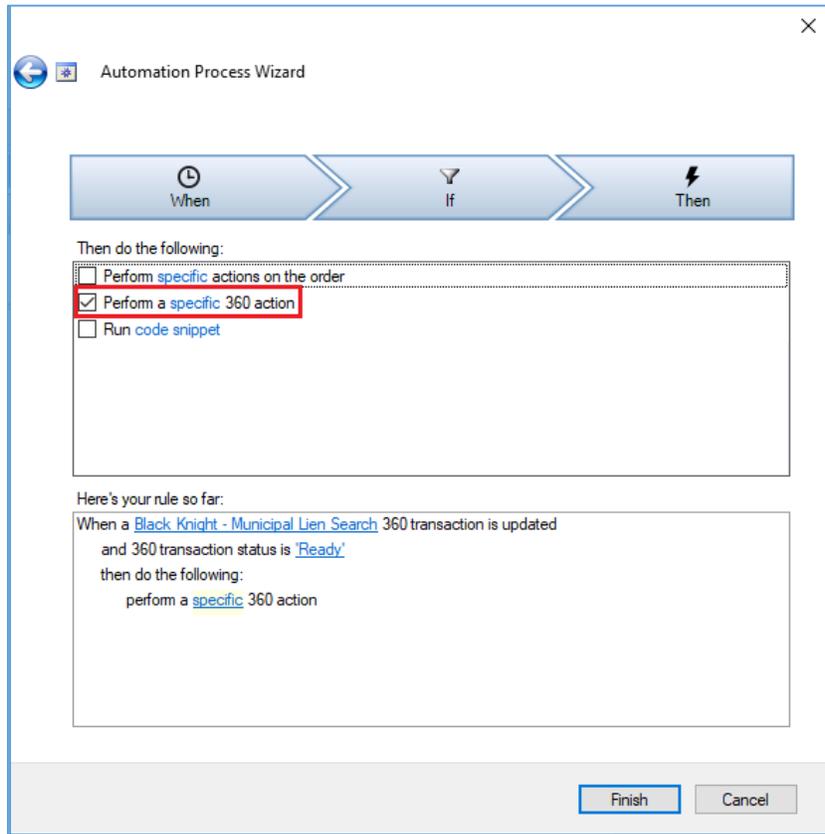


Figure 18 – Accept Process -> Next

**3. Then:**

- a. Perform a **specific** 360 action
  - i. Click on the **specific** link to open the **Service Action** and select Service as **“Black Knight – Municipal Lien Search”**.
  - ii. For Accept Documents, select Service Action as **Accept Documents** to import the document returned by Black Knight. Else, **No Action** to not import any document.
  - iii. Click **OK** to return to Automation Process Wizard.



**Figure 19 – Accept Process -> Specific Action**

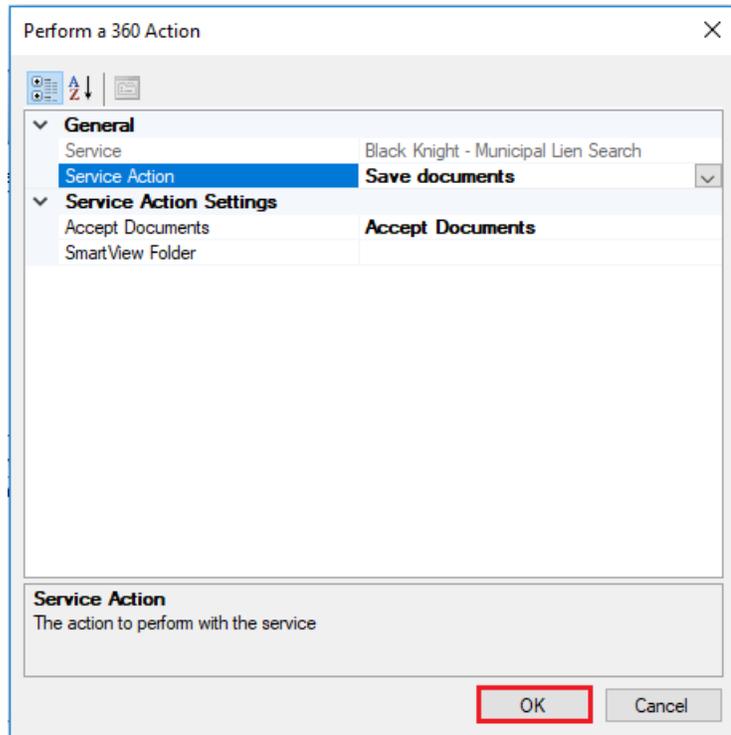


Figure 20 – Accept Process -> Select Actions

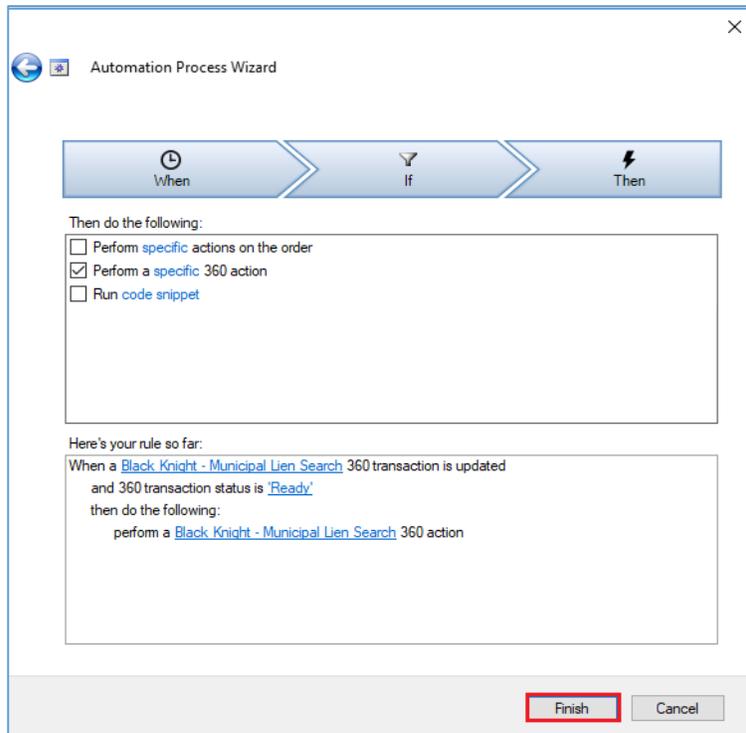


Figure 21 – Accept Process -> Finish

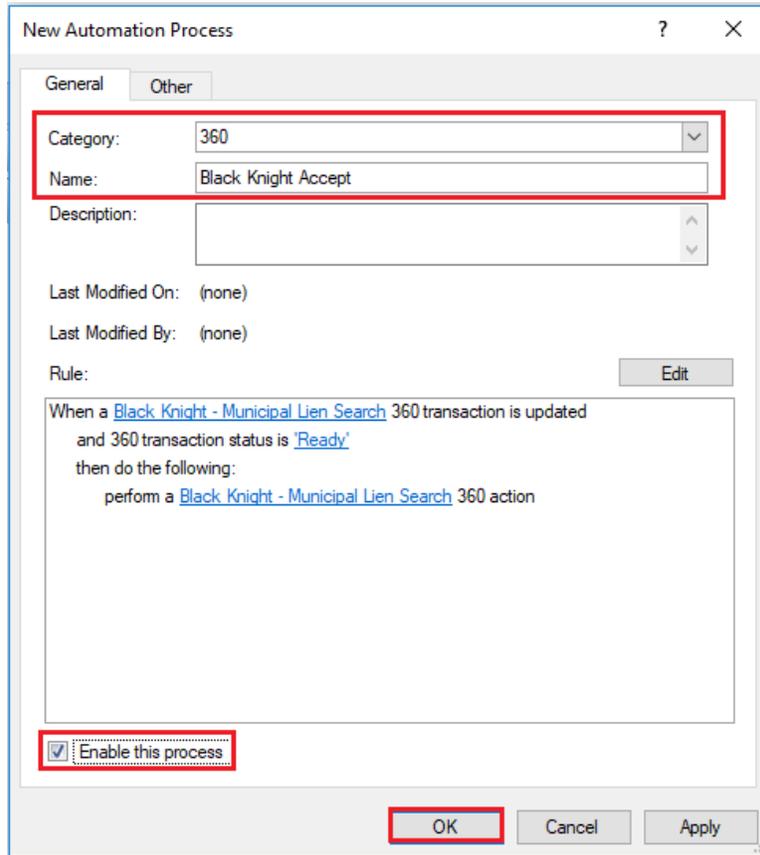


Figure 22 – Accept Process -> Name and Enable the process

### Trigger Accept Process

The **Accept** process created in the automation wizard will get triggered when Black Knight sends a remit to SoftPro 360 and the transaction status changes to **Ready**.

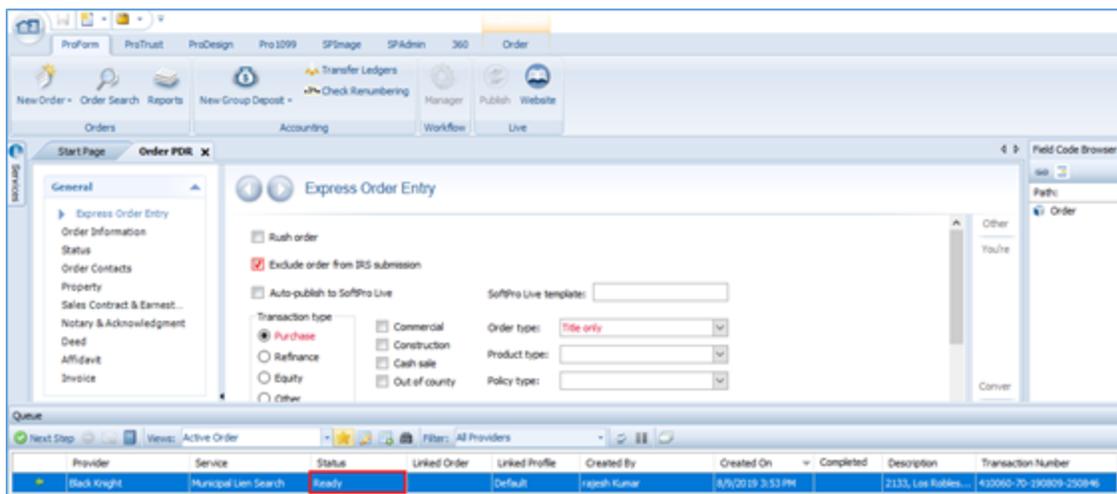


Figure 23 – SP360 Queue -> Remit issued for one transaction

Close the Select order. The accept automation will be initiated and can be monitored from the Monitoring Console under **SP Admin -> Configuration -> Automation**. The status will reflect as **Completed** if the process is finished successfully without any errors.

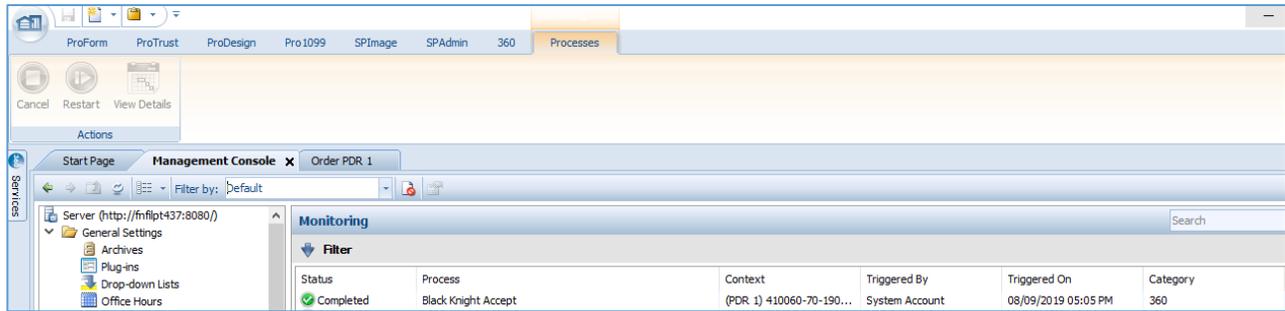


Figure 24 – Process Monitoring -> Process Completed

Open your Select order and navigate to **Order -> Attachments** to view the documents accepted as a result of the successful execution of the Accept automation process.

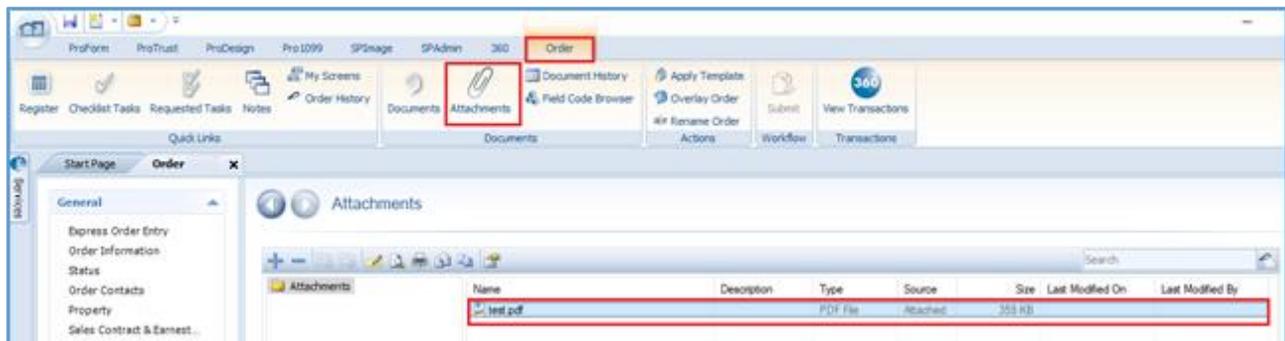


Figure 25 – Attachments