

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:	2133, Los Robles	
<u>City:</u>	Pensacola State: FL Zip Code: 32003-	Foreign
In the:	County v of Bradford County GLC:	
APN/Parcel ID:	▶ 8675309 Tax/Map ID:	

Figure 2: SoftPro Property Details

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



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.

4 Click on the Skip Welcome Page checkbox to bypass this screen for future logins.

Login Screen

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

🚭 Black Knight		×
Login		BLACK KNIGHT
	Please provide your credentials	
U	er ID: 701	
Pass	word:	
	Remember Me	
	Ba	ick Login Cancel

Figure 5: Login Screen for Black Knight

4 Click on Login to continue to the Property & Product screen.

4 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.

	tion	BLACK	🌠 KNIGH
		FINAN DATA	G ANALYTICS
Property			
Property :	2133, Los Robles,	Pensacola, Bradford, FL	~
Address :	2133, Los Robles		
City :	Pensacola	State : FL Zip : 32003	
County :	Bradford	Parcel ID : 8675309	
Product			
Product	Name		^
Product(s):	Full Municipal	I Search	
	HOA/Condo E	Estoppel Letter	*
Notes :			^
			~
			and blacks

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.

۵	Black Knight				×
Ord	ler Contacts				
	The following contact(s) will be sent with your or	der:		
	Туре	Name	Category	Email	
	Buyer	Mark Mathew McCaffr	Individual	mark.mccafry@fnf.co	
	Seller	Jack	Individual	jack.john@fnf.com	
	HOA	Pearson Spectre			
					1
				Close	
				01036	

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

Black Knight	×
Documents :	
Name	Browse
	Attachment
	Documents
	Rename
	Delete
L	
	Close



- **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.

5 (B)	Profram ProTrust ProDes Profram ProTrust ProDes Services Search Administration Transactions Secu	ign Pro1099 SP0mage SPA Logn Logout Information Help arity Resources	dmin 300 Order Order About Publish Website Live				
C Services	Start Page Order POR x Onarges were made by other user General	(s). Click <u>Refresh</u> to update the order.	Entry			43	Pield Code Browser se 3 Path: © Order
	Express Order Entry Order Information Status Order Contacts Property	Rush order Rush order from IRS submiss Auto-publish to SoftPro Live	sion Softima Live ter	mplate:		A Other You're	
	Sales Contract & Earnest Notary & Acknowledgment Deed Affidawit Tecnica	Transaction type CG Purchase CG O Refinance CG O Refin	mmercial Order type: Instruction Product type: sh sale	Title only	×		
Queu	ent Step 🙃 🖂 🖬 Venus: Active O	rder - 🍺 🔅 🖓 d	B Pitter: Al Providers	· o 0			
	Provider Servic	ce Status	Linked Order Linked Profile	Created By	Created On	Description Transact	on Number

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.

Proform Profinat Pr	sDesign Pro 1099 SPImage Design Pro 1099 SPImage Transfer New Group Deposit - Arrangements	e SPAdmin 360 r Ledgers Ianumbering Manager Wook face	Order					
Start Page Order PDR General A Dopress Order Entry	×	Order Entry	LTE .				4 b	Field Code Browser see 3 Path: © Order
Order Stromation Status Order Contacts Property Sales Contract & Earnest Notary & Arknowledoment	Rush order Kucke order from Kuck-publish to Soft	IRS submission Sho Live	SoftPro Live te	ngiate:			You're	
Deed Affidavit Invoice	Purchase Refinance Equity Order	Continential Construction Cash sale Out of county	Product type: Product type: Policy type:		2		Conver	
Queue	ve Order 🔹 🚖	🗩 😘 📾 Piters Alf	roviders	· • • • Ø				
Provider 5 Black Knight M	ervice Status unicpol Lien Search Ready	Linked Order	United Profile	Created By rajesh Kumar	Created On v	Completed Description 2133, Los R	Transactio	n Number - 190809-2508-46

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.

6	Review Bla	ck Knigl	nt Order				×
	Documen	ts					
E	View	Сору	File Name		File Size(KB)	Transferred	
E	2 🔑	P	test.pdf		124	100%	
<u> </u>							_
					Accep	t Close	

Figure 12: 360 'Review' screen for Black Knight

Documents Section

- Click on View to preview the document.
- 4 Click on **Copy** to copy the document to your local system.
- **W** 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.

		Concert and				
Proform ProTrust P	roDesign Pro 1099 SPSmage SPV	Admin 360 Order				
Queue Services Search Transactions	ton Login Logiut Security Resources	About Publish Website				
Start Page Order PDR X					4.1	Field Code Browser
General	CO CO Express Order Ent	try				se 🗉 Pathi
Order Information Status Order Contexts Property Salas Contexts & Exment	Rush order Rush order Exclude order from IRS submission Auto-publish to SoftPro Live	SoftPho Live ter	mplate:]	A Other You're	
Notary & Acknowledgment Deed Affidavit	Transaction type Comm Const Const Const Const	ercial Order type: ruction Product type:	Title only]		
Invoice	O Eauty Out of	county Policy type:		1	Conver	
Queue						
C Next Step C S Vevs: Ad	tve Order 🔹 🙀 🔀 🛛	B Filter: Black Knight	• o II 📿			
Provider	Service Status	Linked Order Linked P	rofie Created By	Created On v Completed	Description Transaction	on Number
 Back Kright 	Aunicipal Lien Search Accepted	Default	rajesh Kumar	8/9/2019 3:20 PM	2133, Los Robles 410060-7	- 190809-250840

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).

Profess ProTrust ProDesign Pro1000	PSnage SPAdmin 360 Order								-
Reputer Overlast Tasis Requested Tasis Notes	e O Documents Attachments Attachments	 Apply Template Overlay Order Resame Order 	Di Balera	Vew Transactor	916				
Quick Links	Documents	Actions	Workflow	Transactions					
Coneral A Depress Order Entry Order Enformation	achments						Search		0
Order Contacta Attachmenta	Name	Descrip	ton	Туре	Source	Sze	Last Modified On	Last Modified By	_

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

(] I	Automation Process Wizard	×
	Image: When Image: When	
	Ond this survey where	
	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 Lian Search 360 transaction is undated	
	When a <u>black within a wantopar ben bearch</u> ood 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.

	G		Y		4	
	When		lf		Then	
And	d if these conditions are met	:				
	360 transaction product co	ntains specific v	alue			~
	360 transaction provider re	ference name co	ontains specific va	lue		
	360 transaction provider re	ference number (contains specific v	value		
	360 transaction sent to cor	n <mark>tains</mark> specific va	lue			
\checkmark	360 transaction status is sp	ecific value				
	360 transaction sub produc	t contains speci	fic value			
	Order has the following crite	eria				
	A code snippet evaluates t	o true				~
He	re's your rule so far:					
Wh	en a <u>Black Knight - Municip</u>	al Lien Search 3	60 transaction is u	updated		
	and 360 transaction status	is <u>specific value</u>] -	•		

Figure 16 – Accept Process -> Specific Value

lf ×
360 transaction status is New Completed Rejected Canceled Error InProgress Updated Accepted Suspended Sending
OK Cancel

Figure 17 – Accept Process -> Select Status

G :	8 Automation Process Wizard	×
	© 7 4	
	When If Then	
	And if these conditions are met:	
	360 transaction product contains specific value	^
	360 transaction provider reference name contains specific value	
	360 transaction provider reference number contains specific value	
	360 transaction sent to contains specific value	
	360 transaction sub product contains specific value	
	Order has the following criteria	
	A code snippet evaluates to true	*
	Here's your rule so far:	
	When a <u>Black Knight - Municipal Lien Search</u> 360 transaction is updated and 360 transaction status is Ready.	
	Next > Cance	el

Figure 18 – Accept Process -> Next

3. Then:

- a. Perform a specific 360 action
 - Click on the <u>specific</u> 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.

	G		Y		ţ	
	When		lf		Then	
п	nen do the following:					
Γ	Perform specific actions or	n the order				
	Perform a specific 360 act	ion				
	Run code snippet					
H	ere's your rule so far:					
N	hen a <u>Black Knight - Munici</u>	pal Lien Search 360	transaction is upo	dated		
	and 360 transaction status	s is <u>'Ready'</u>				
	then do the following:					
	then do the following: perform a specific 360	action				
	then do the following: perform a specific 360	action				
	then do the following: perform a <u>specific</u> 360	action				
	then do the following: perform a <u>specific</u> 360	action				

Figure 19 – Accept Process -> Specific Action

08/26/2019

Perf	form a 360 Action		×
•	ੈat 🖻		
~	General		
	Service	Black Knight - Municipal Lien Search	
	Service Action	Save documents	\sim
~	Service Action Settings		
	Accept Documents	Accept Documents	
	SmartView Folder		
Se	rvice Action		
		OK Canc	el

Figure 20 – Accept Process -> Select Actions

G I	Automation Process Wizard	×
	© 7 F	
	When If Then	
	Then do the following:	
	Perform specific actions on the order	
	Perform a specific 360 action	
	Run code snippet	
	Here's your rule so far:	
	When a Black Knight - Municipal Lien Search 360 transaction is updated	
	and 360 transaction status is <u>'Ready'</u>	
	then do the following:	
	perrorm a <u>black kningrit - municipal Lien Search</u> 360 action	
	Finish Cancel	I

Figure 21 – Accept Process -> Finish

N	ew Automation Pro	ocess	?	×
	General Other			
	Category:	360	~	1
	Name:	Black Knight Accept		
Ľ	Description:		~	
			~	
	Last Modified On:	(none)		
	Last Modified By:	(none)		
	Rule:		Edit	
	When a <u>Black Knig</u> and 360 transac then do the follo perform a <u>B</u>	<u>ht - Municipal Lien Search</u> 360 transaction is updated ction status is <u>'Ready'</u> owing: <u>ack Knight - Municipal Lien Search</u> 360 action		
	Enable this proc			
		OK Cancel	Appl	y

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.**

Proform Profile Prof NewOrder- Order Search Reports N Orders	enign Pro 1099 SPDmage SP Control Control Con	Admin 360 ng Oo Manager Workflow	Order							
Orders Accounting Uve Start Page Order FDS. X Ceneral Express Order Entry Express Order Entry Express Order for IDS submission Property Sales Contract & Exmest Notary & Actionaledgeset Purchase Commercial Order type: Commercial Commercial Order type: Commercial Order type: Commercial Commercial Commercial Order type: Commercial <li< th=""><th>Pield Code Browser se 3 Path: Q1 Drider</th></li<>								Pield Code Browser se 3 Path: Q1 Drider		
Dearland Conver										
Next Step III III III III IIII IIII IIII IIIIIII	Criter Earth Ready	Unked Order	Linked Profile Default	Orested by registric Converted	Created On +	Completed Description	Transacti 430060-7	on Number		

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.

1) 🖩 💾 🔹	🗎 •) =						Monitoring					-
	ProForm	ProTrust	ProDesign	Pro 10	99 SPImage	SPAdmin	360	Processes					
Canc	el Restart Vi	ew Details											
	Actions												
0	Start Page	Manag	ement Console	• ×	Order PDR 1								
Servi	¢ > 🖄 🛫	BEE - Filte	er by: Default		-	3							
8	Server (http	://fnfilpt437:8	080/)	^ M	onitoring								Search
	Arch	ives		-	Filter								
	Plug Drop	-ins o-down Lists		St	atus	Process			Co	ntext	Triggered By	Triggered On	Category
	Offic	ce Hours			Completed	Black Knight	Accept		(PE	OR 1) 410060-70-190	System Account	08/09/2019 05:05 PM	360

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