

American Property Guard (APG) User Guide (v1.0)

APG – Property Tax Services | April 12, 2017

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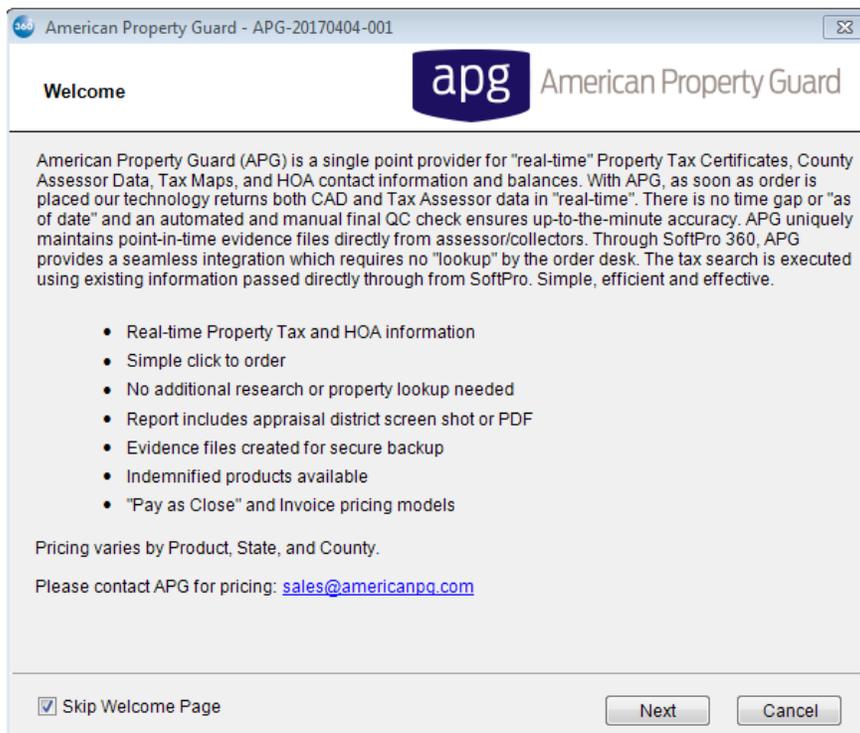
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Introduction

Benefits/Features

The American Property Guard integration with SoftPro 360 provides SoftPro users with the ability to seamlessly order and receive American Property Guard products. The SoftPro 360 integration allows the user to send required information from a ProForm Order to American Property Guard and eliminate the need to retype data.

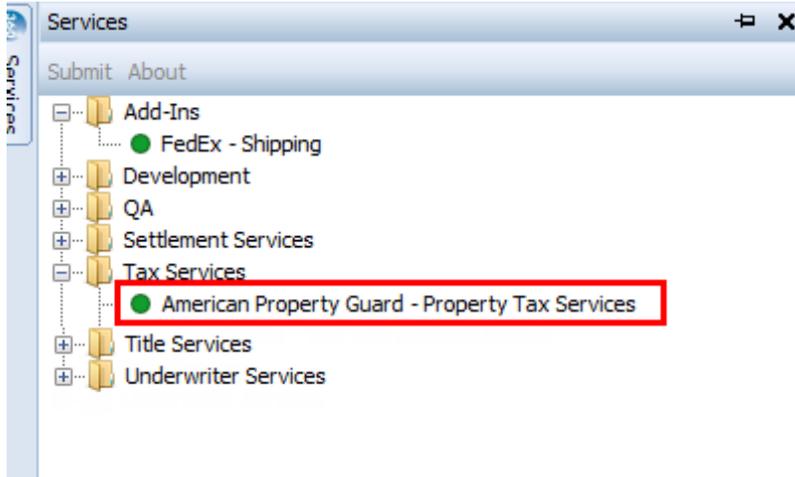
Users will be able to accept returned documents into the ProForm Order, helping increase productivity and provide the ability for users to work more efficiently.



Launching APG

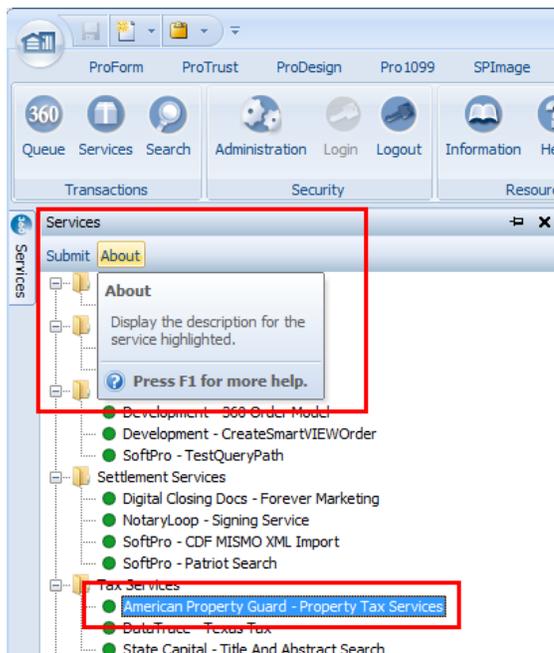
Access from the 360 Services Menu

APG appears in the 360 Services Tree under **Tax Services**



About

SoftPro 360 customers will be able to see a general description of the APG services by clicking **About** in the Services menu.





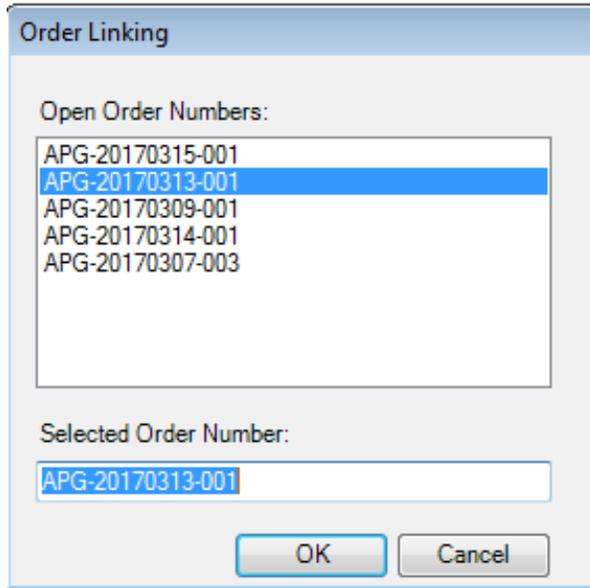
- **More Information** link opens browser to APG website
- **OK** closes the About Window

Selecting a ProForm Order for your Request

From the **Order Linking** screen, select the Proform Order for the request.

Order Linking

Requestor selects an order and initiates the request process with APG



Order Linking

Open Order Numbers:

- APG-20170315-001
- APG-20170313-001
- APG-20170309-001
- APG-20170314-001
- APG-20170307-003

Selected Order Number:

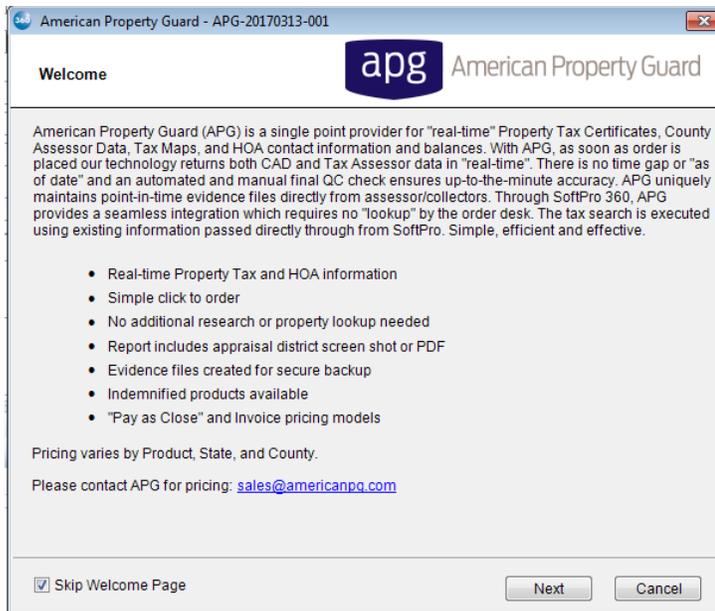
APG-20170313-001

OK Cancel

- All the Orders that are currently opened in your 360 session will be listed in the **Open Order Numbers** pane. The **Selected Order Number** field will automatically populate with the currently active ProForm Order
- You may **select an Order** from the list which will **automatically display** in the **Selected Order Number** field or you can manually enter the desired Order number
- Click **OK** to navigate to the **Welcome screen**
- Click **Cancel** to end the Request process

Welcome Screen

The **Welcome** screen provides a summary of American Property Guard products and contact information.



- Click the **Skip Welcome Page** checkbox to bypass viewing this page in future sessions
- Click the imbedded **email link** to initiate an email to APG Sales
- Click **NEXT** to navigate to the **Login Screen**
- Click **Cancel** to end the request process

Login Screen

The **Login** screen requires you to enter your **User ID** and **Password** which has been provided by American Property Guard.

American Property Guard - APG-20170313-001

Login

apg American Property Guard

Please provide your credentials

Username: softpro_test

Password: *****

Remember me

For assistance, contact American Property Guard at support@americanpg.com or call 888.519.1367 x4

Back Next Cancel

- Click the **Remember me** check box to automatically log in the next time
- Click the imbedded **email link** to initiate an email to APG Support
- Click **Next** to continue to the **Data Review/Product(s) Selection** screen
- Click **Back** to return to the **Welcome** screen
- Click **Cancel** to end the request process

Submitting an APG Request

Data Review Screen

The Data Review screen contains ProForm Order data.

American Property Guard - APG-20170313-001

Data Review

apg American Property Guard

The following information will be sent with the order

Property: 123 First Avenue, Raleigh, TX

Address 1: 123 First Avenue

Address 2:

City: Raleigh State: TX Zip: - -

County: Bastrop

Buyer Name(s): Buyers Club, Bob B Buyer and Bob Buyer, II

Seller Name(s): Sam Seller, Sellers 'R Us and Sam Seller, II

Legal Description: This is the brief legal description.

[File Information](#)

Back Next Cancel

- **Property** dropdown contains the full address of each property associated with the ProForm Order
- **State** dropdown contains a 2-digit state code for all of the states APG services
- **County** dropdown contains a list of all the counties associated with state selected
- **Legal Description** defaults to the selected property's Escrow Brief Legal description if the Escrow Legal (long) is not available. If neither legal description has been entered on the ProForm Order
- Click the **File Information** link to go to the **File Information** screen where additional, but optional data can be viewed, added or modified
- Click the **Back** button to return to the **Login** screen
- Click the **Next** button to proceed to the **Product(s) Selection** screen
- Click the **Cancel** button to cancel the session without submitting a request to APG

If Order data is incorrect or incomplete, cancel the request session and return to ProForm to make changes to the Order.

All of the data can be modified on this screen but updates are NOT made to the ProForm Order.

Data Review Screen Edits

The following information will be sent with the order

Property: 123 March 16 Test Order 1, TX

Address 1: *

Address 2:

City: * State: TX Zip: - -

County: Bastrop

Buyer Name(s):

Seller Name(s):

Legal Description:

[File Information](#) ⚠

Back Next Cancel

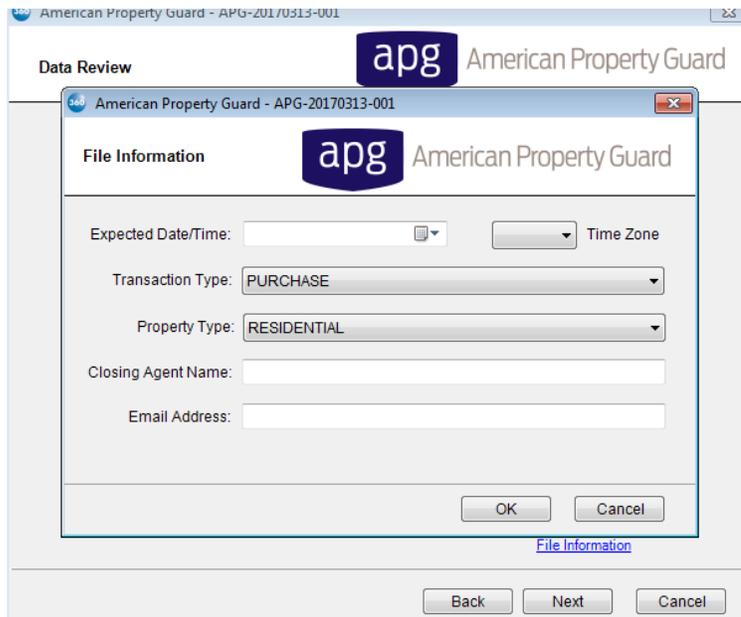
- A **red asterisk (*)** flags an invalid/incomplete value. Use your cursor to hover over the asterisk to view the description of the error
 - **Address 1** edit: Cannot be NULL
 - **City** edit: Cannot be NULL
 - **State** edit: APG does not provide services in this state; cannot be NULL
 - **County** edit: APG does not provide services in this county; cannot be NULL
- A **yellow warning sign** ⚠ is flagging an error on the **File Information** Screen which must be corrected before proceeding to the **Product(s) Selection** Screen
- The **NEXT** button is activated once all errors have been corrected and all required information has been entered

Ordering for multiple properties

Some orders may have more than one property. One or more products can be ordered for each property, but a new request must be initiated for each property associated with the order.

File Information Screen

Use the File Information screen to include additional optional information for the request. Although all of the data on this screen is optional, the screen contains edits for some of the values whether the data has been pulled thru from the ProForm Order OR entered on this screen.



The screenshot shows a software interface for American Property Guard. The main window is titled "Data Review" and contains a sub-window titled "File Information". The sub-window has a header with the "apg" logo and "American Property Guard". Below the header, there are several input fields: "Expected Date/Time:" with a date picker and a "Time Zone" dropdown; "Transaction Type:" with a dropdown menu set to "PURCHASE"; "Property Type:" with a dropdown menu set to "RESIDENTIAL"; "Closing Agent Name:" with a text input field; and "Email Address:" with a text input field. At the bottom of the sub-window are "OK" and "Cancel" buttons. Below the sub-window is a blue link labeled "File Information". At the bottom of the main window are "Back", "Next", and "Cancel" buttons.

- Click **OK** to save any updates and return to the **Data Review** screen
- Click **Cancel** to cancel any updates and return to the **Data Review** screen

File Information Screen Edits

The screenshot shows a software window titled "American Property Guard - APG-20170313-001" with a "Data Review" header. Inside, a smaller window titled "File Information" is open, also with the same title. The "File Information" window contains the following fields:

- Expected Date/Time: 02/14/2017 12:00 AM (with a calendar icon and a red asterisk) Time Zone
- Transaction Type: PURCHASE (dropdown menu)
- Property Type: RESIDENTIAL (dropdown menu)
- Closing Agent Name: Cloe Closing Agent (text input)
- Email Address: cloe_closing_agent (text input with a red asterisk)

Buttons for "OK" and "Cancel" are at the bottom of the "File Information" window. Below it is a blue link labeled "File Information". At the bottom of the main window are buttons for "Back", "Next", and "Cancel".

- A **red asterisk (*)** flags an invalid value. Use your cursor to hover over the asterisk to view the description of the error
 - **Expected Time & Date** edit: Cannot be less than the current date
 - **Email Address** edit: Optional, but must be in a valid email format ([name@xxx.yyy](#))

Product(s) Selection Screen

Once all the required data have been entered and validated on **Data Review** and **File Information** screens, the requestor can proceed to the **Product(s) Selection** screen.

Note: If all of the required data has been in the Proform Order and there are no edit errors on the data found in the Data Review and File Information screens, this request is considered to be on a “fast path” and will be the initial landing page.

The screenshot shows a web browser window titled "American Property Guard - APG-20170404-001". The page header includes the "apg" logo and "American Property Guard". The main heading is "Product(s) Selection". Below this, there is a section titled "Select the product(s) you would like to order" containing a table with three rows: "Tax Cert", "Builder Tax Cert", and "Note Only", each with an unchecked checkbox. A red asterisk (*) is positioned to the right of the table. Below the table is a section titled "Contact Information for product(s) ordered" with two input fields: "Name: User Name" and "Email Address: username@" with a red asterisk (*) to its right. At the bottom of this section is a checkbox labeled "Add Notes & Documents". At the very bottom of the form are three buttons: "Back", "Submit", and "Cancel".

- Screen defaults on screen open:
 - **Add Notes & Documents** checkbox defaults to unchecked (no)
 - A **red asterisk (*)** flags indicates a product must be selected, and required data must be entered and/or formatted
 - **Submit** button is deactivated
 - **Contact Information** defaults to the *User Name and Email Address*
 - Click the **Back** button to return to the **Data Review** screen
 - Click the **Cancel** button to cancel the session without submitting a request to APG

American Property Guard - APG-20170316-001

Product(s) Selection

apg American Property Guard

Select the product(s) you would like to order

- Builder Tax Cert
- HOA Full
- HOA Info
- Tax Cert

Contact Information for products(s) ordered

Name: Barbara Moresi

Email Address: barbara.moresi@softprocorp.com

Add Notes & Documents

Back Submit Cancel

- After selecting one or more product checkboxes and entering a correctly formatted email address, the **Submit** button becomes activated
- Click the **Submit** button to submit the request and complete the request process

Product(s) Selection Screen Edits

American Property Guard - APG-20170309-001

Product(s) Selection **apg** American Property Guard

Select the product(s) you would like to order

- Builder Tax Cert
- HOA Full
- HOA Info
- Tax Cert

Contact Information for product(s) ordered

Name: *

Email Address: *

Add Notes & Documents

Back Next Cancel

- A **Contact Name and email address** are required for the order.
- A **red asterisk (*)** flags an invalid value. Use your cursor to hover over the asterisk to view the description of the error.
 - **Contact Name** edit: Required; defaults to the User Login Name; data is editable but cannot be NULL
 - **Contact Email** edit: Required; defaults to the User Email address; data is editable but cannot be NULL and must be in a valid email format, e.g. [name@xxx.yyy](#)

Adding Note(s) and Documents

To add note(s) to your request, select the **Add Notes and Documents** checkbox.

American Property Guard - APG-20170309-001

Product(s) Selection **apg** American Property Guard

Select the product(s) you would like to order

- Builder Tax Cert
- HOA Full
- HOA Info
- Tax Cert

Contact Information for product(s) ordered

Name:

Email Address:

Add Notes & Documents

Back Next Cancel

- The **SUBMIT** button changes to **NEXT**
- Click **Next** to proceed to the **Add Notes** screen

Add Note(s)

Use this screen to include notes with this request. External ProForm Order notes can be included as well as new request notes.

The screenshot shows the 'Add Note(s)' interface. At the top, there is a header with the 'apg' logo and 'American Property Guard'. Below the header, the title 'Add Note(s)' is displayed. The main area contains a table of notes and several checkboxes and buttons.

Status	Text	Send
Pending	Add this note when ordering the Builder's Tax Cert	<input checked="" type="checkbox"/>
Pending	Include this Note when ordering the HOA Full	<input type="checkbox"/>
Pending	Let me know if anything else needs to be ordered f...	<input checked="" type="checkbox"/>

Below the table, there is a 'Note Text' input field containing the text: 'Let me know if anything else needs to be ordered for the City of Erwin.' To the right of the input field, there are two checkboxes: 'Add to ProForm Notes' (checked) and 'Add Documents' (checked). At the bottom of the screen, there are three buttons: 'Back', 'Next', and 'Cancel'.

- **Default values** when screen opens
 - **Show ProForm Notes** checkbox is checked and all external ProForm Order Notes are displayed in the **Notes** list box
 - **Add Documents** checkbox is not checked
 - **Submit** button is active
- The **Show ProForm Notes** checkbox defaults to checked (yes) when the screen opens and displays all external ProForm Order notes in the list box.
- If user unchecks the **Show ProForm Notes** checkbox, all external ProForm Order notes will be removed from the list box.

- The **Notes** list box contains a separate line for each ProForm Order Note and a separate line for each new note added to the request
 - **Status** indicates the status of each note.
 - **Pending** status shows note has not previously been sent for this order and is can be included with this request if user clicks **Send**
 - **Sent** status shows note has previously been sent for this order and cannot be included with this request
 - **Text** displays the beginning of the note. The full note is displayed in the **Notes Text** textbox below when selected.
 - **Send** checkbox controls if note will be sent with the request (defaults to unchecked)
- Use the **New** button to add a new Note to the request.
- Use the **Remove** button to delete a note from the **Notes** list box by placing the cursor on the note to be removed.
- The **Notes Text** textbox contains the full Note text for the highlighted line in the **Notes** list box.
- When adding a new Note, begin entering a new note in the **Notes Text** textbox.
 - A **Note** cannot be NULL
 - The **Submit** button will be disabled until text has been entered for the new note
 - A Note has a maximum size of 1900 characters. If a Note will exceed the maximum size, save note in a separate document and proceed to **Add Document(s)** to attach and send with the request.
- The **Add to ProForm Notes** checkbox is enabled when a new Note is entered. This Note will be saved to the ProForm Order as an internal note.
- Uncheck the **Add to ProForm Notes** checkbox to indicate the Note is only for the request and does not need to be saved to the ProForm Order.
- Check the **Add Documents** checkbox to continue to the **Add Document(s)** screen and the **Submit** button will change to **Next**
- Click the **Back** button to return to the **Product(s) Selection** screen.
- Click the **Submit** button to send the request to APG
- Click the **Next** button to continue to the Add Documents screen
- Click the **Cancel** button to cancel the session without submitting the request to APG.

Add Document(s) Screen

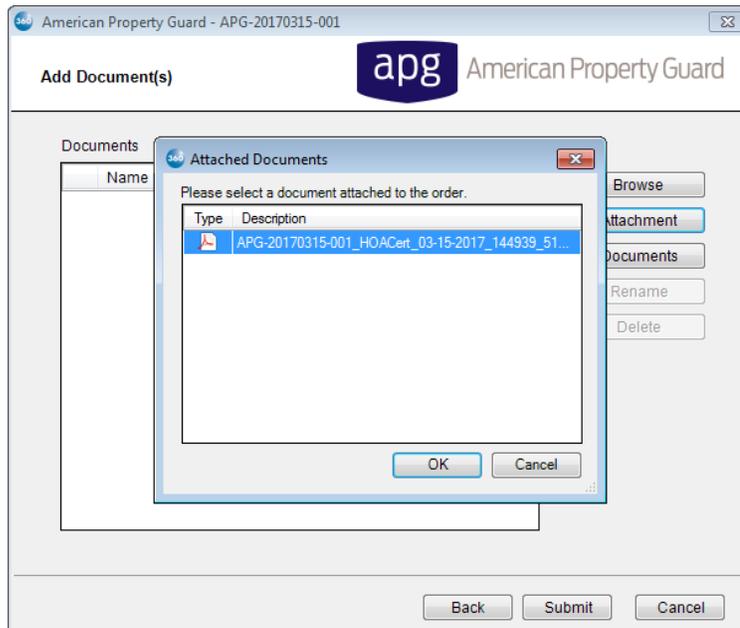
Use this screen to attach documents to the request. Documents may either be selected from the ProForm Order or added from external sources.

The screenshot shows a web application window titled "American Property Guard - APG-20170309-001". The page header includes the "apg" logo and the text "American Property Guard". The main content area is titled "Add Document(s)". Below this title is a section labeled "Documents" containing a table with one column header "Name". To the right of the table are five buttons: "Browse", "Attachment", "Documents", "Rename", and "Delete". At the bottom of the window are three buttons: "Back", "Submit", and "Cancel".

- Click the **Browse** button to open the user's file folder and user can select file(s) with valid extensions
- Click the **Attachment** button to open the ProForm Order's attachments for selection
- Click the **Documents** button to open the ProForm Order's Ready Docs (available for use with pre-Select versions of SoftPro ProForm)
- Click the **Rename** button to change an attachment's name
- Click the **Delete** button to delete an attachment from the request
- Click the **Back** button to return to the previous screen **Add Note(s)**
- Click the **Submit** button to submit the request to APG
- Click the **Cancel** button to cancel the session without submitting the request to APG

Attached Documents

Documents attached to the ProForm Order may be selected to be attached to the request.



Submitting the Request

Submit

The request workflow has been designed so the request can be submitted with a minimal amount of effort. The Submit process can be executed from any of these screens:

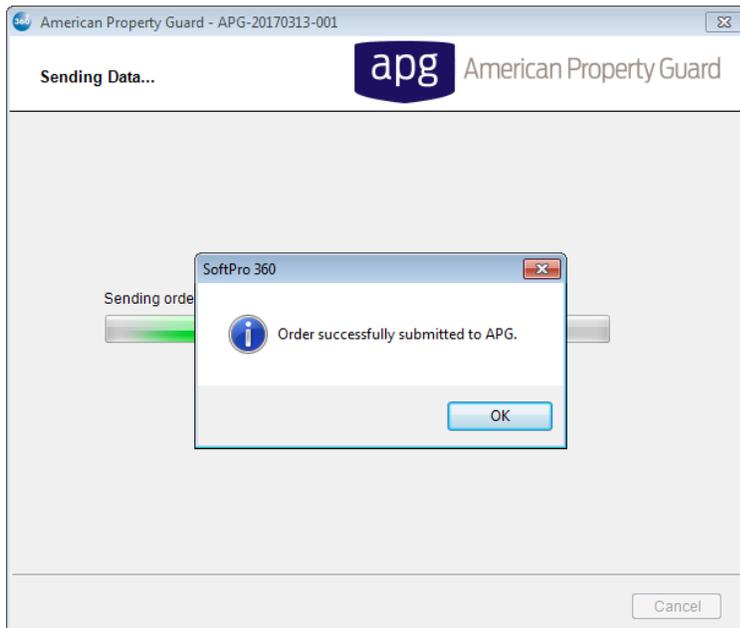
1. Product(s) Selected (*shortest Submit workflow*)
2. Add Note(s)
3. Add Document(s)

SUBMIT sends the request to APG and ends and disconnects the APG session.

Submit Process

Progress fill bar and Request Submitted confirmation

A progress fill bar and confirmation message display to provide confirmation/feedback the process has completed.



Canceling a Request

The SoftPro 360 integration service does NOT include a Cancel function for the initial release.

The user must contact APG directly to cancel a request. APG will initiate a Cancel transaction and send a Cancellation update to the request. The transaction status will be changed to Cancelled.

360 Queue Transaction Updates

A separate SoftPro 360 transaction is created and is added to the 360 Queue for each product ordered.

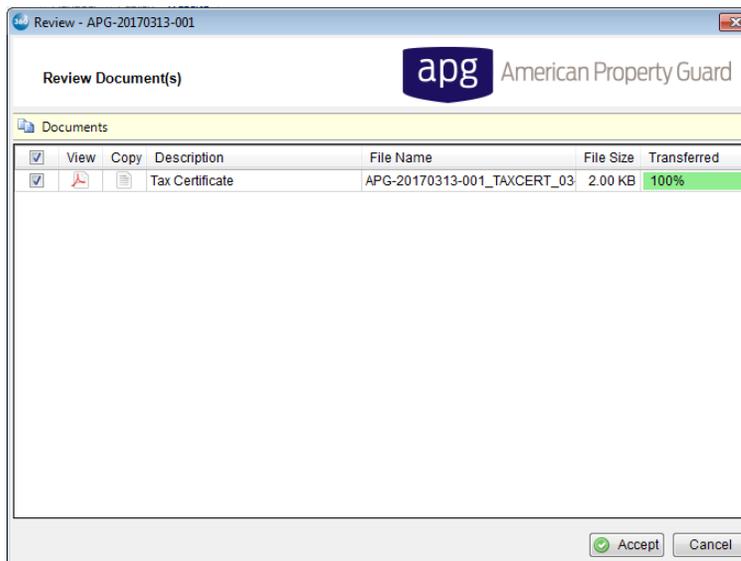
Accepting a Response

APG may reply to the request with either a **document** or **message** and the 360 Queue transaction status will change to **READY**.

Review Documents

This page provides the user with a list of all the documents returned for the request. The page defaults to selecting all documents when the page opens. Each document can be selected/deselected by using the checkbox, opened for review (View), and/or copied to the clipboard.

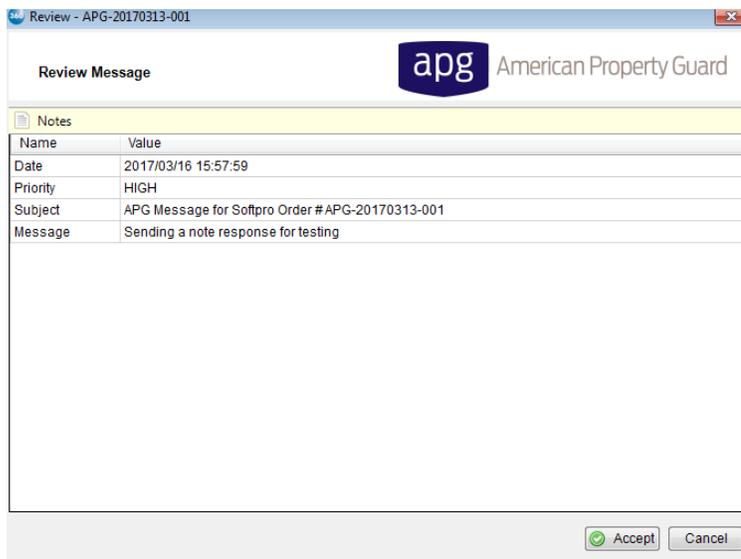
The User may select one, all or none of the documents by using the document checkbox. If no documents are selected the **Accept** button will not be activated and the only option is to **Cancel**.



- When Requestor selects **Next Steps**, SoftPro 360 displays a **Review Document(s)** screen where the requestor can view and **ACCEPT** the response
- If the APG response contains a **document or documents**, all the documents are automatically selected on open
- Click the document's checkbox to **deselect** a document
- Click the **Accept button**, to add each selected document to the **ProForm Order Attachments** and the transaction status will change from **Ready** to **Accepted**
- Clicking the **Cancel** button, returns the user to the 360 Queue without saving any of the documents to the ProForm order and the 360 transaction status remains **Ready**

Review Messages

This page provides the user with the message detail returned from APG.



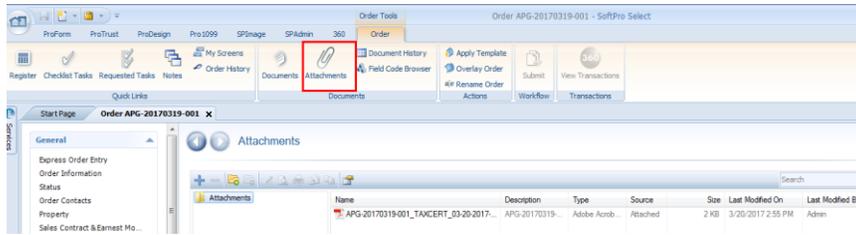
The screenshot shows a window titled "Review - APG-20170313-001". The window contains the "Review Message" header with the APG logo and "American Property Guard" text. Below this is a "Notes" section with a table of message details:

Name	Value
Date	2017/03/16 15:57:59
Priority	HIGH
Subject	APG Message for Softpro Order #APG-20170313-001
Message	Sending a note response for testing

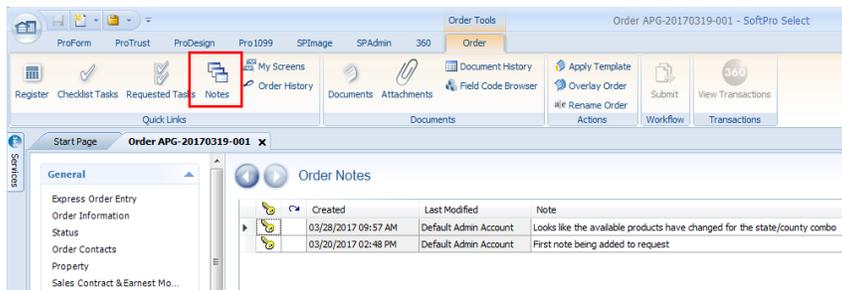
At the bottom of the dialog are two buttons: "Accept" (with a green checkmark icon) and "Cancel".

- When Requestor selects **Next Steps**, SoftPro 360 displays a **Review Message** screen where the requestor can view and **ACCEPT** the message
- When the requestor **Accepts**, the 360 transaction status changes from **Ready** to **Accepted** and the **message** will be added as an **internal Note** to the ProForm Order
- Clicking the **Cancel** button, returns the 360 Queue without saving the notes to the ProForm order and status remains **Ready**

Updates to ProForm Order



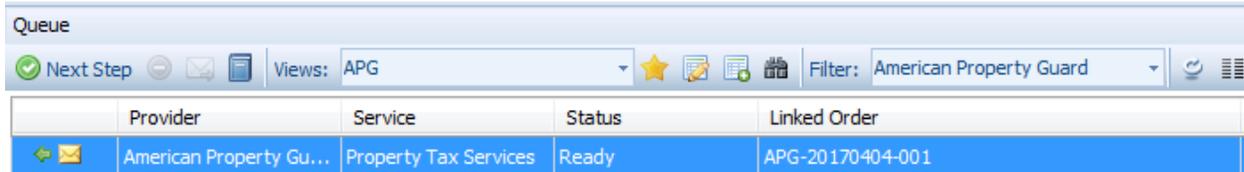
Selected documents will update the **ProForm Order Attachments** on **Accept**. User must **Save** the **ProForm Order** to permanently attach documents.



Accepted messages will update the **ProForm Order Notes** on **Accept**. User must **Save** the **ProForm Order** to permanently attach notes.

SoftPro 360 Queue

360 Queue Transactions



The screenshot shows the 'Queue' interface in SoftPro 360. At the top, there is a 'Next Step' button with a green checkmark, followed by icons for a minus sign, an envelope, and a document. The 'Views' dropdown is set to 'APG'. To the right, there are icons for a star, a document with a pencil, a calendar, and a filter icon. The 'Filter' dropdown is set to 'American Property Guard'. Below this is a table with the following data:

Provider	Service	Status	Linked Order
American Property Gu...	Property Tax Services	Ready	APG-20170404-001

Transaction Values

Provider = American Property Guard

Service = Property Tax Services

Status = current status (see values below)

Linked Order = ProForm Order Number

Linked Profile = literal "Default"

Created by = User Name

Created on = Date and timestamp

Category = Tax Services

Description = Product Name; Property Address

Transaction Number = SoftPro 360-assigned transaction number

Transaction Status Values

In progress

Request has successfully been submitted

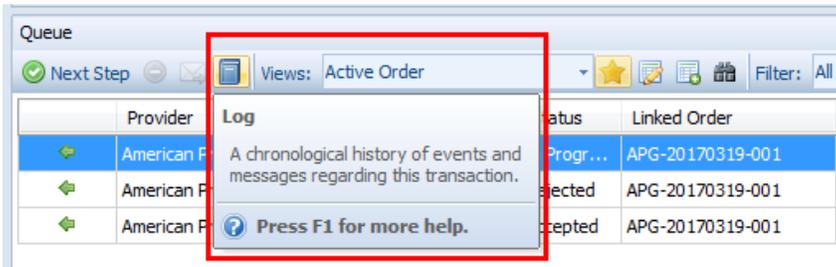
Processing

Request was not successful.

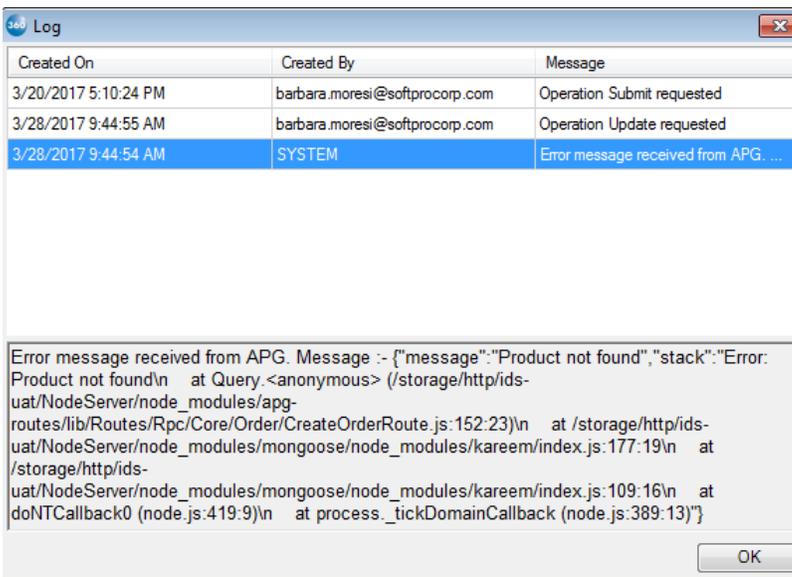
Action: Resubmit a new request. If resubmit also fails, contact support and open the transaction log for additional information to assist in identifying the problem.

Ready

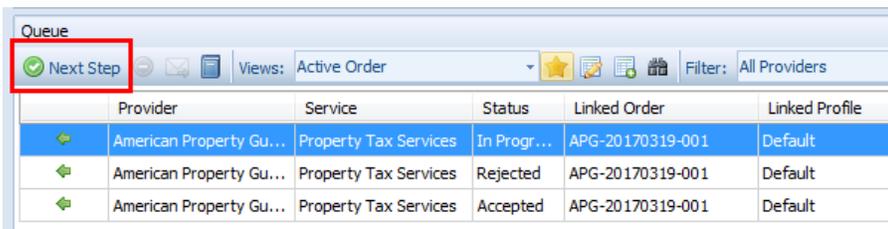
APG has returned the requested documents and/or a message.



Use the **LOG** to view information regarding the returned transaction



Use **NEXT STEP** to review the response or send an update to the request



Accepted

Status after the user has accepted the response.

Cancelled

Status when APG sends a cancellation notification

Rejected

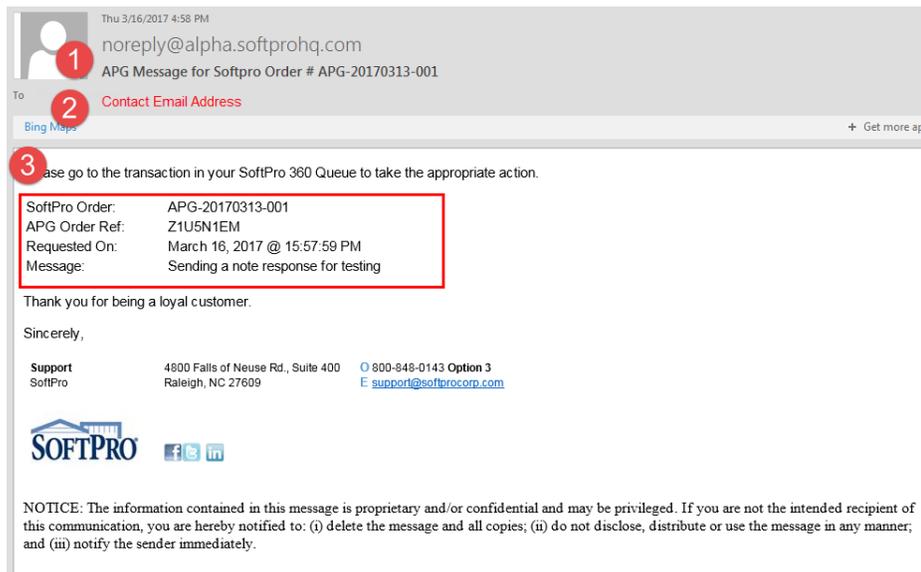
Request failed due to some environmental error, e.g. server down, network connection problems, connection timeout, etc.

Email Notifications

When 360 receives a response, the 360 transaction will be updated to **Ready** in the 360 Queue.

If APG has marked a response with a HIGH severity and needs your immediate attention, SoftPro 360 notifies the Contact (identified on the original request) with an email alert.

Sample Email Notification



1. ProForm Order Reference
2. Contact Name entered when placing the request
3. APG response with reference information and the message