

CloseSimple - SoftPro360 Automation Integration (v1.0)

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Introduction

CloseSimple is a Settlement Service providing firm which provides the functionality of sending personalized text messages, automated email updates and their Pizza Tracker for title to help drive business forward and save time.

The objective of this document is to explain how the integration works with respect to the automation set up and its respective workflow.

Launching CloseSimple Automation

In order to launch the CloseSimple automation, follow the below steps:

- 1) Create an order on SoftPro Select
- 2) Create a task in SoftPro order
- 3) Create an automation process for Submit
- 4) Launch Submit process

Create an order in SoftPro Select

Launch SoftPro select and create the order with the information related to Buyer, Seller, Property Address, Title Company and other relevant contacts:

The screenshot displays the 'Express Order Entry' form within a window titled 'Order 2019010002*'. The form includes several sections:

- Transaction type:** A group box containing radio buttons for 'Purchase' (selected), 'Refinance', 'Equity', and 'Other'. To the right are checkboxes for 'Commercial', 'Construction', 'Cash sale', and 'Out of county', each with a corresponding label.
- Related order(s):** An empty text input field.
- Sales price:** A text input field containing '\$250,001.00'.
- Table:** A table with three columns: 'Description', 'Deposit Amount', and 'Amt Returned to Buyer'. The first row has a description 'Deposit or earnest m...'.
- Settlement date/time:** A dropdown menu showing '01/31/2019 12:00 AM'.
- Due date/time:** A dropdown menu showing '01/31/2019 12:00 AM'.

Figure 1 - SoftPro Order Creation

Type	Name	Code	Phone	Email
Attorney	Jack	AT		
Buyer/Borrower	Finn Balor	B	611324696	balorclub@abc.com
Buyer/Borrower	Paul Heymann	B2	564231596	paul.manager@def.com
Seller	Braun Strowman	S	56231865	braun.s@def.com
Title Company	TitleCompany4U	T		

Figure 2 - SoftPro Order Contacts

Create a task in SoftPro order

Click on **Order** tab from the top ribbon in SoftPro Select and navigate to **“Requested Tasks”** screen. Click on the ‘+’ icon to add a task which will be used to trigger the Submit automation. Update the task name and status (Figure 3).

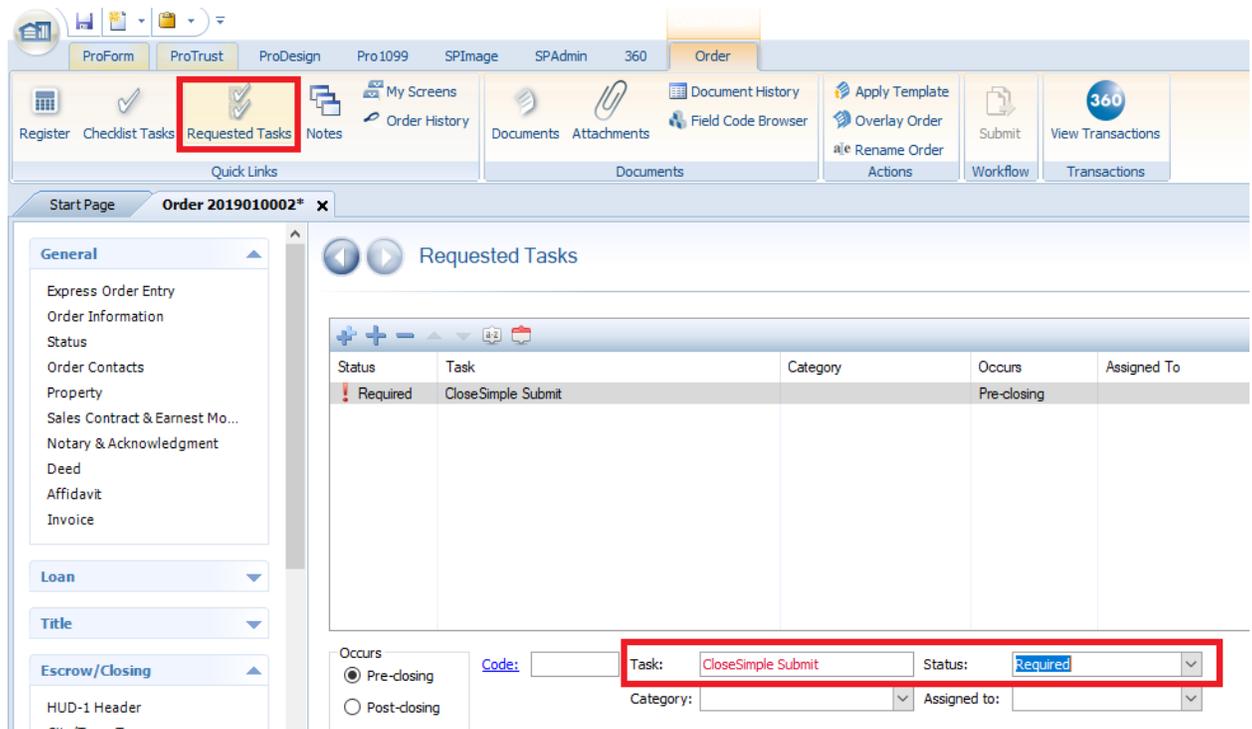


Figure 3 – Requested Tasks Screen

Connection Settings in SP Admin

In order for the automation processes to trigger, you will be required to set-up the connection settings in SP Admin as explained in this section.

In SoftPro Select, **go to SP Admin and right-click on Server name -> Properties** to open the SoftPro Select Server window. Navigate to the tab **SoftPro 360** and update the necessary connection details.

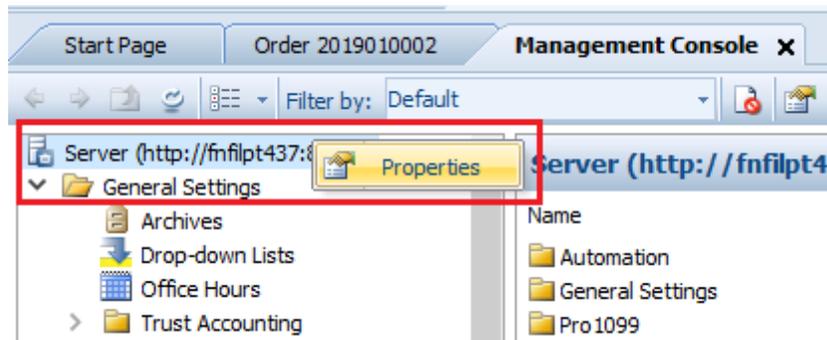


Figure 4 – SP Admin

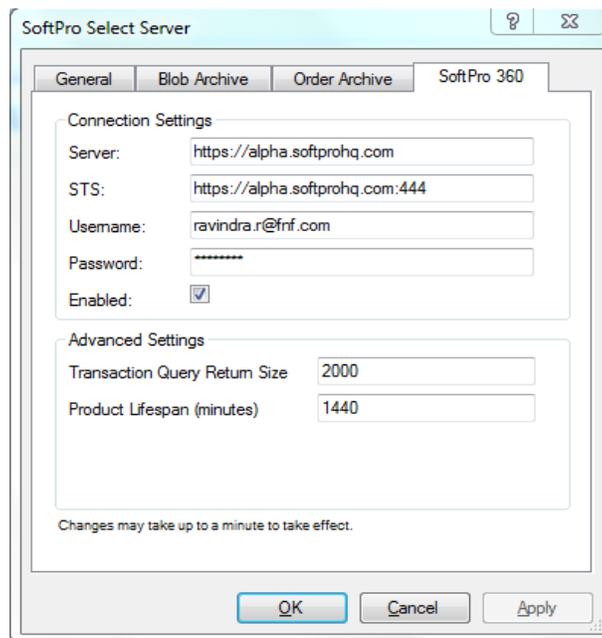


Figure 5 – Set Connection Settings

Create an automation process for Submit

Automation processes can be triggered in many different ways. An example of how to trigger it using a task is described in the below section. For help with alternate methods, please contact automation@SoftProcorp.com.

Steps to trigger Submit automation using a task

Click on **SP Admin** tab from the top ribbon in SoftPro Select and click on “**Configuration**” to navigate to the management console (Figure 6).

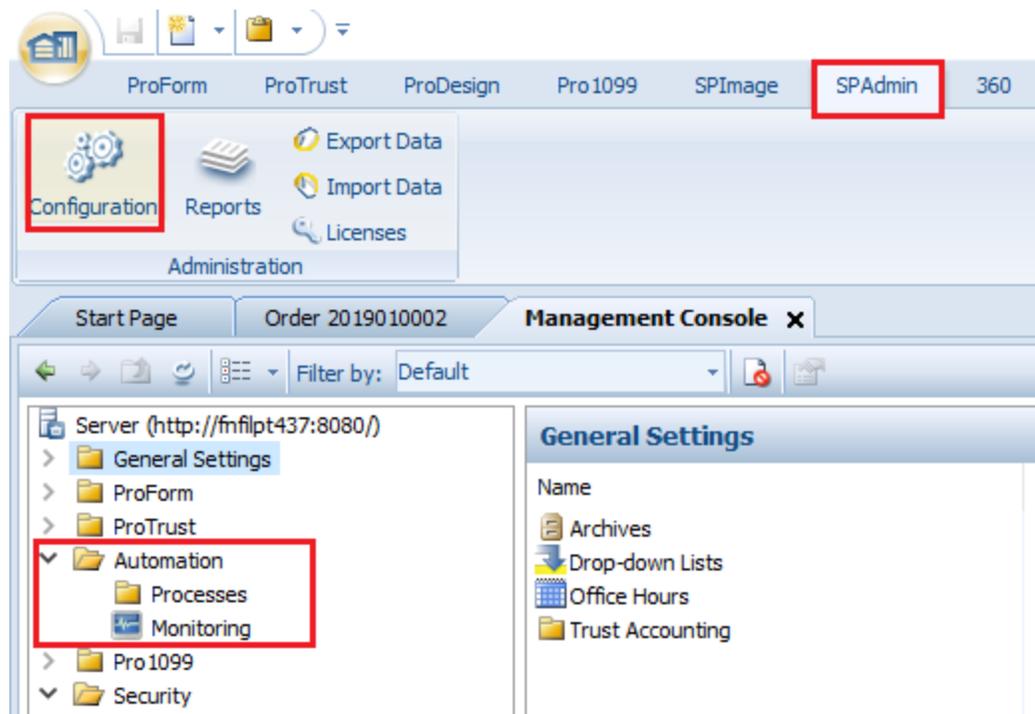


Figure 6 – SP Admin -> Management Console

- Under Automation folder, click on **Processes** and in the blank space, right-click to initiate creating a new process for Submit (Figure 7).

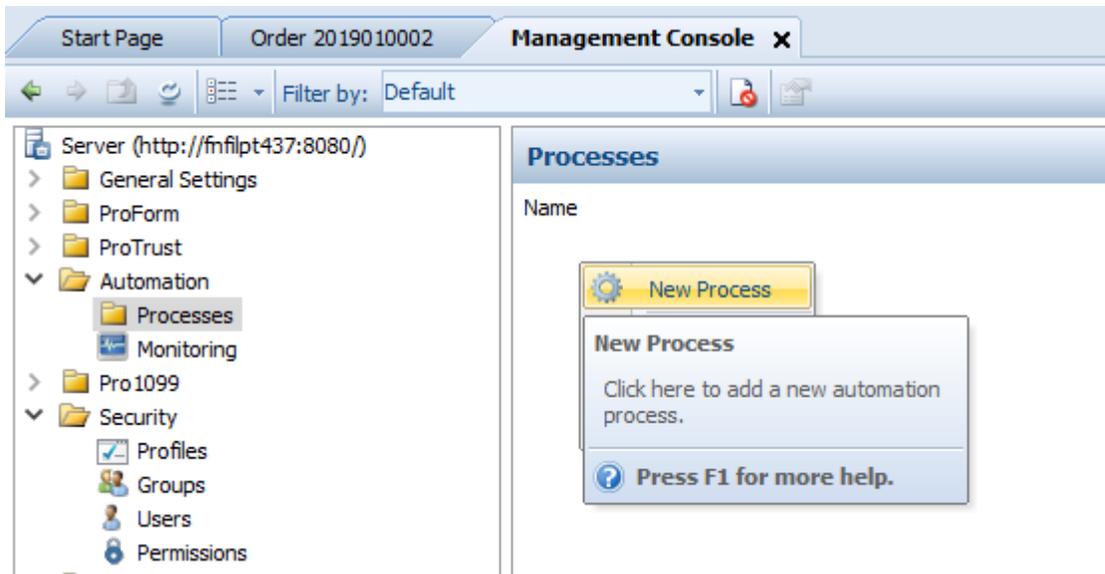


Figure 7 – Automation -> Processes

Follow the below steps in the Automation Process Wizard to create the process:

1. When:

- a. Select the radio button **Task is added or updated.**
- b. Change the occurrence to **Every time** a task is added or updated.

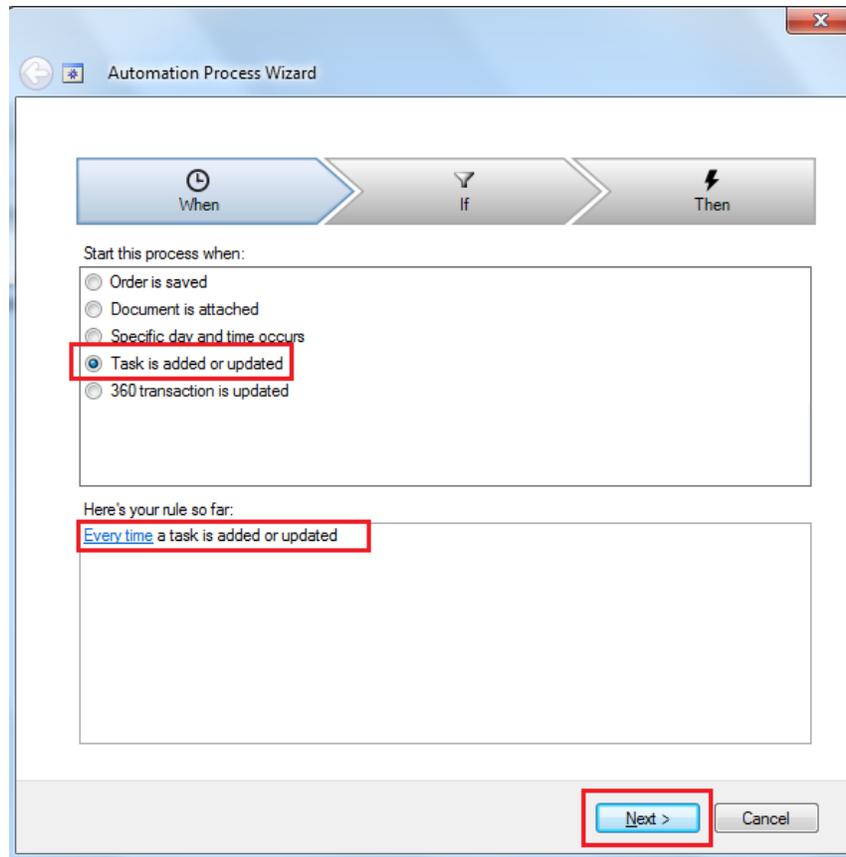


Figure 8 – Create Process -> When to trigger the process

2. If:
 - a. Task name contains **specific value**
 - i. Give the name of the task created in your SoftPro Order.
 - ii. Click on Add and check Exact match only checkbox.
 - iii. Click OK to return to Automation Process Wizard.
 - b. Task status is **specific value**
 - i. From the dialog box, check the status box for **“Requested”**.
 - ii. Click OK to return to Automation Process Wizard.

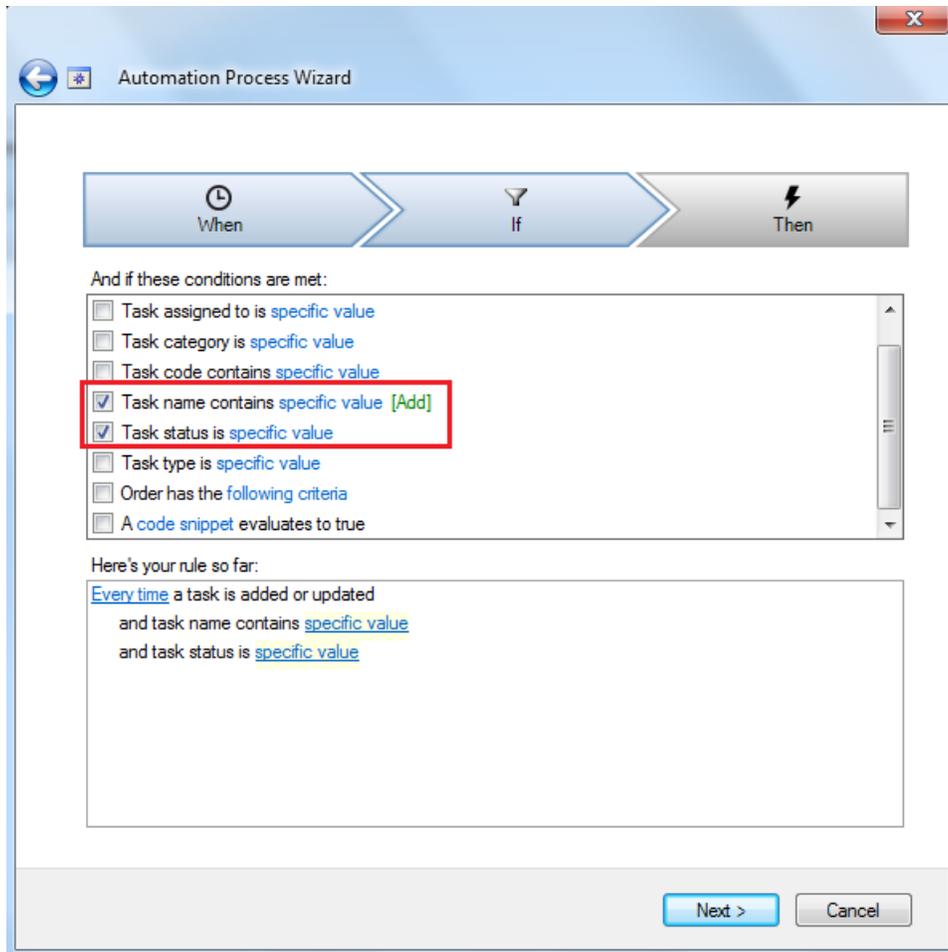


Figure 9 – Create Process -> Add Conditions

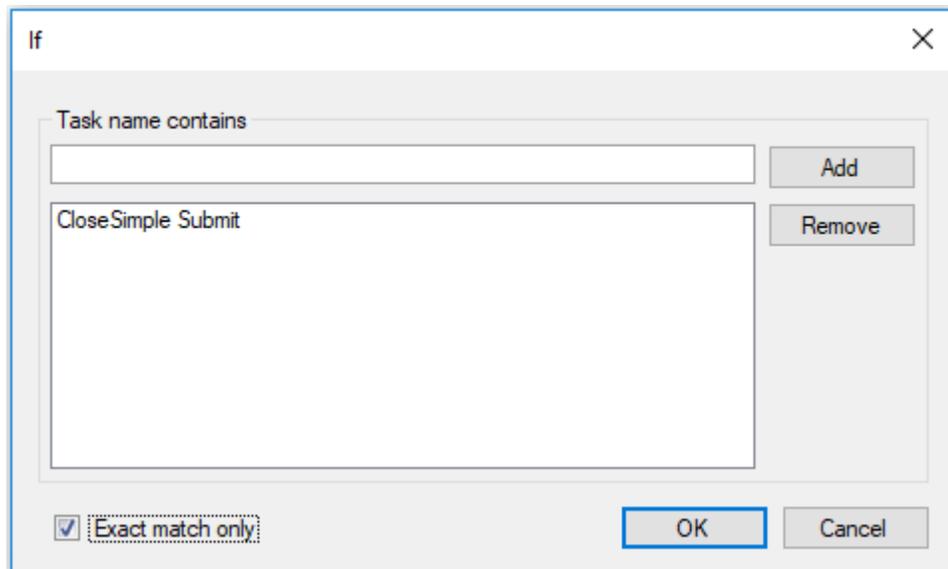


Figure 10 – Create Process -> Add Task Name

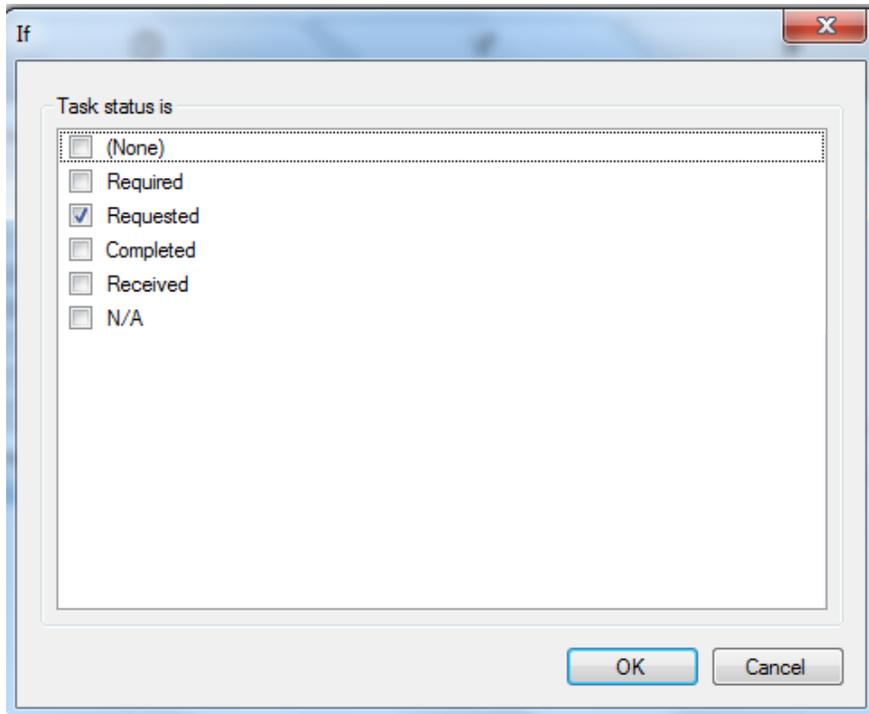


Figure 11 – Create Process -> Select Task Status

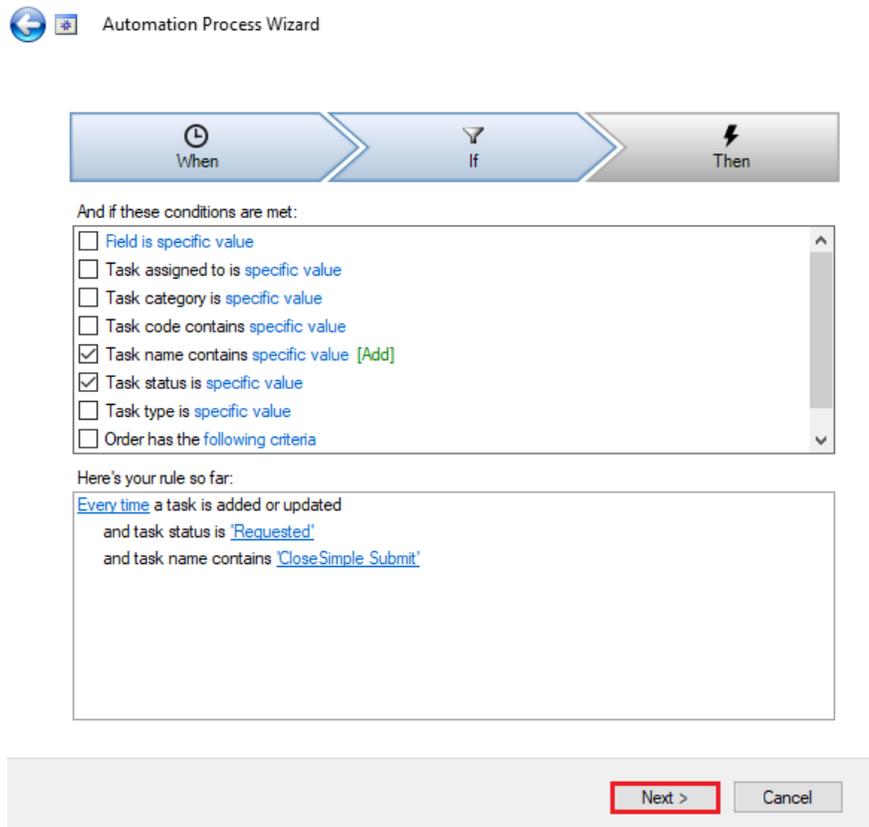


Figure 12 – Create Process -> Next

3. Then:

- a. Perform **specific** actions in an order
 - i. Perform a **specific** 360 action
 - Select Service as “CloseSimple- The Pizza Tracker for Title”
 - Select Service Action as “Submit Order” and fill in the required information.
 - Click OK to return to Automation Process Wizard.
 - ii. Update a **specific** task
 - Select Task Type as “Requested”
 - Provide the Task Name created in Select order.
 - Check the Task status checkbox and select “Received” as the status.
 - Click OK to return to Automation Process Wizard.

Automation Process Wizard

When If Then

Then do the following:

- Perform **specific** actions in an order
- Run code snippet

Here's your rule so far:

Every time a task is added or updated
and task name contains 'CloseSimple Submit'
and task status is **specific value**
then do the following:
perform **specific** actions in an order

Finish Cancel

Figure 13 – Create Process

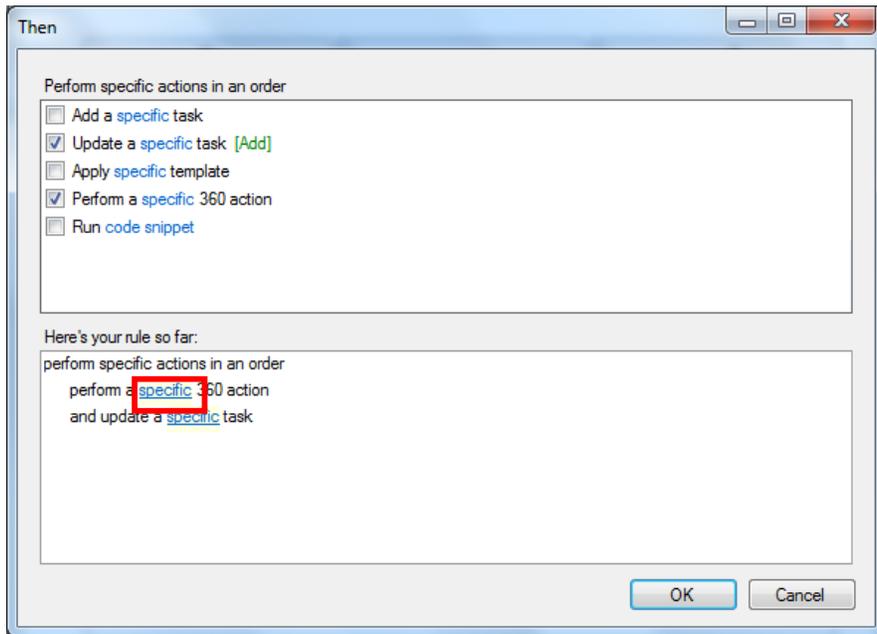


Figure 14 – Create Process -> Perform 360 action

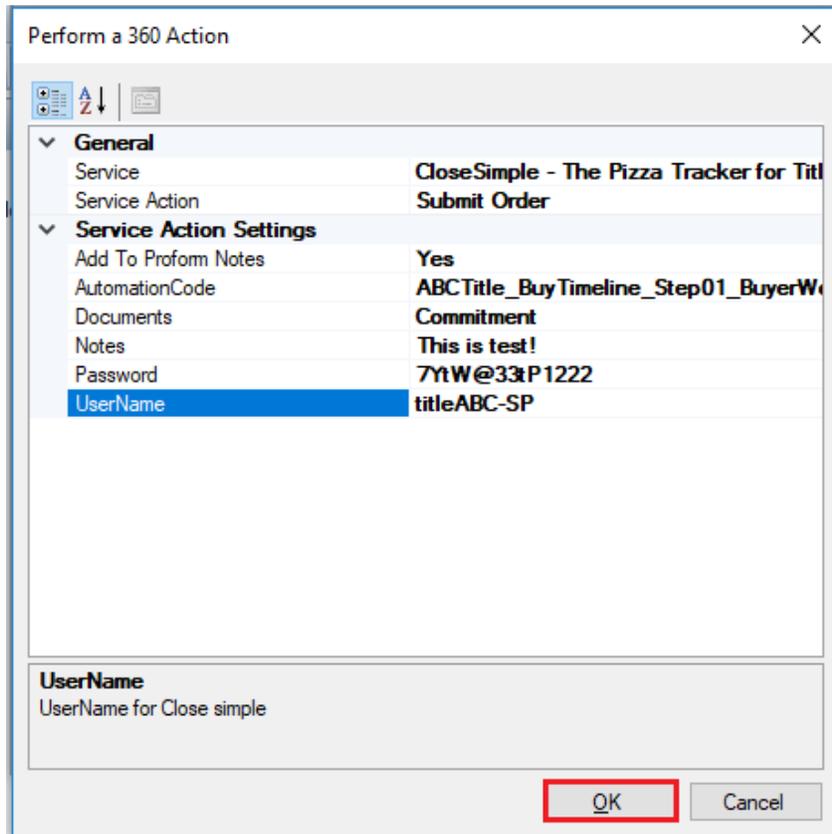


Figure 15 – Create Process -> Input details

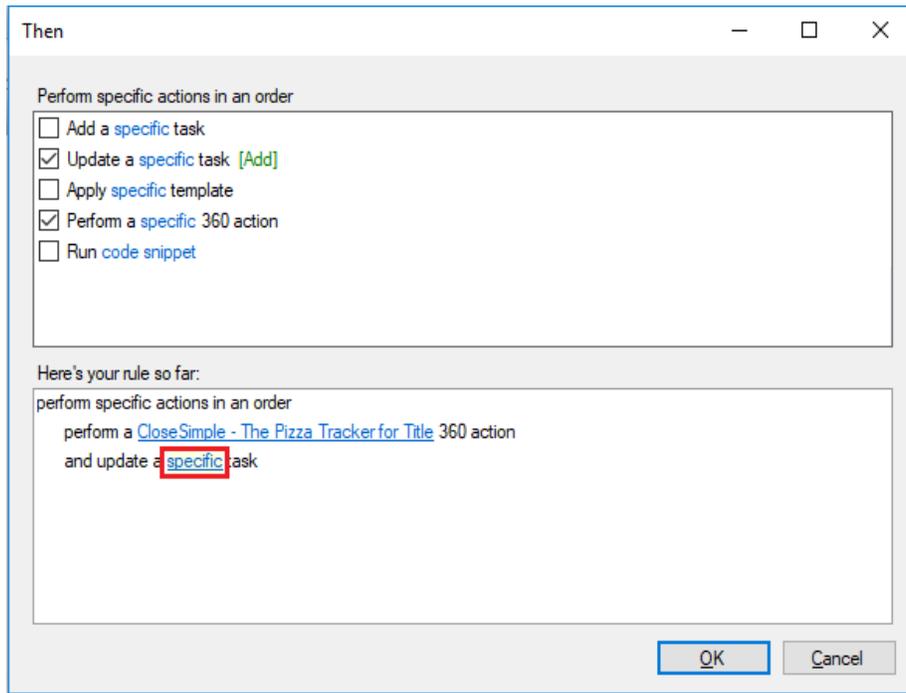


Figure 16 – Create Process -> Update Task Status

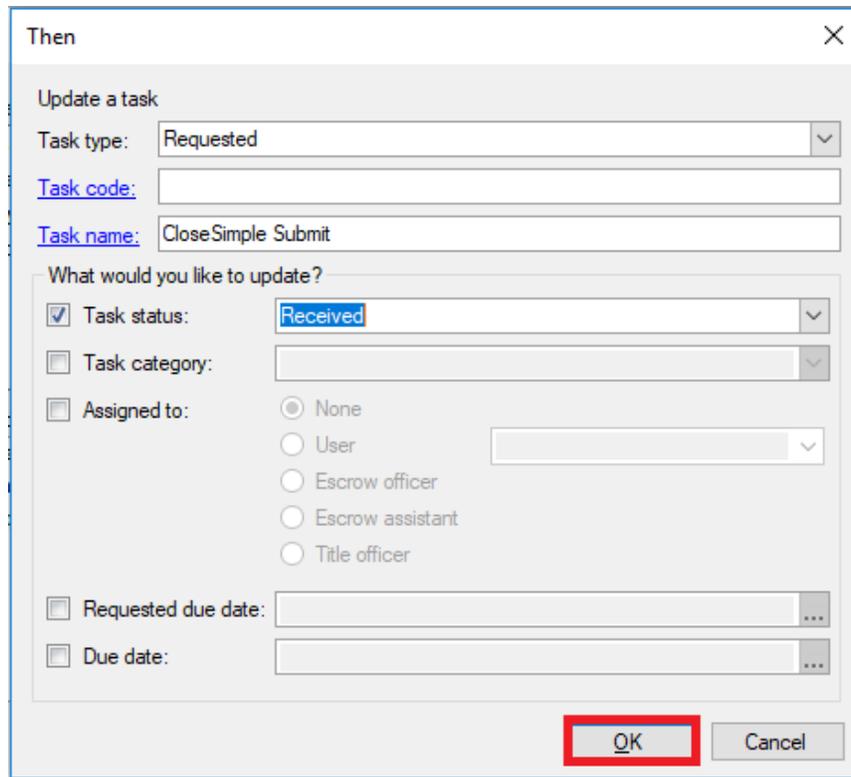


Figure 17 – Create Process -> Select task and status

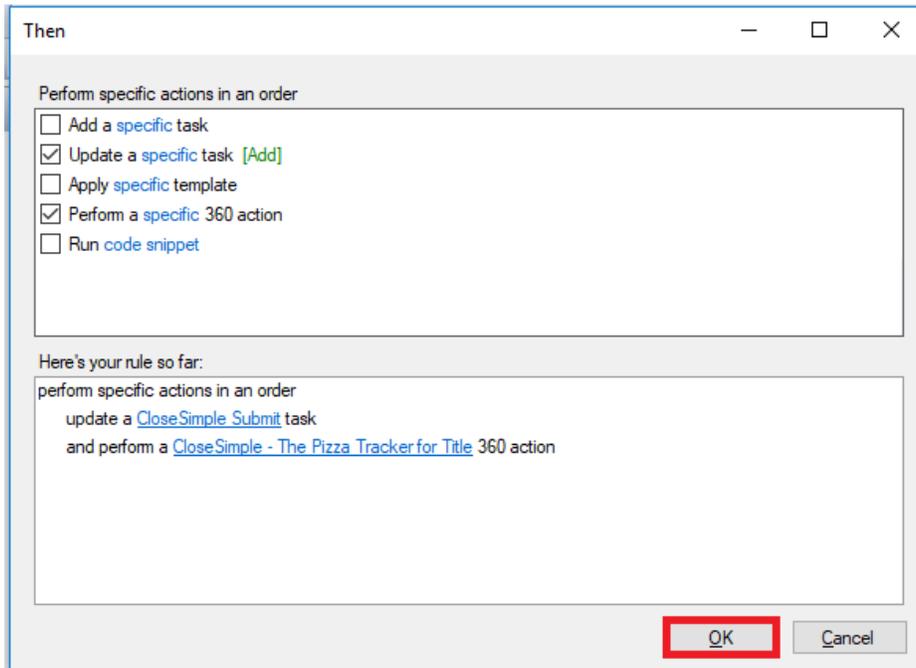


Figure 18 – Create Process -> Confirm selection

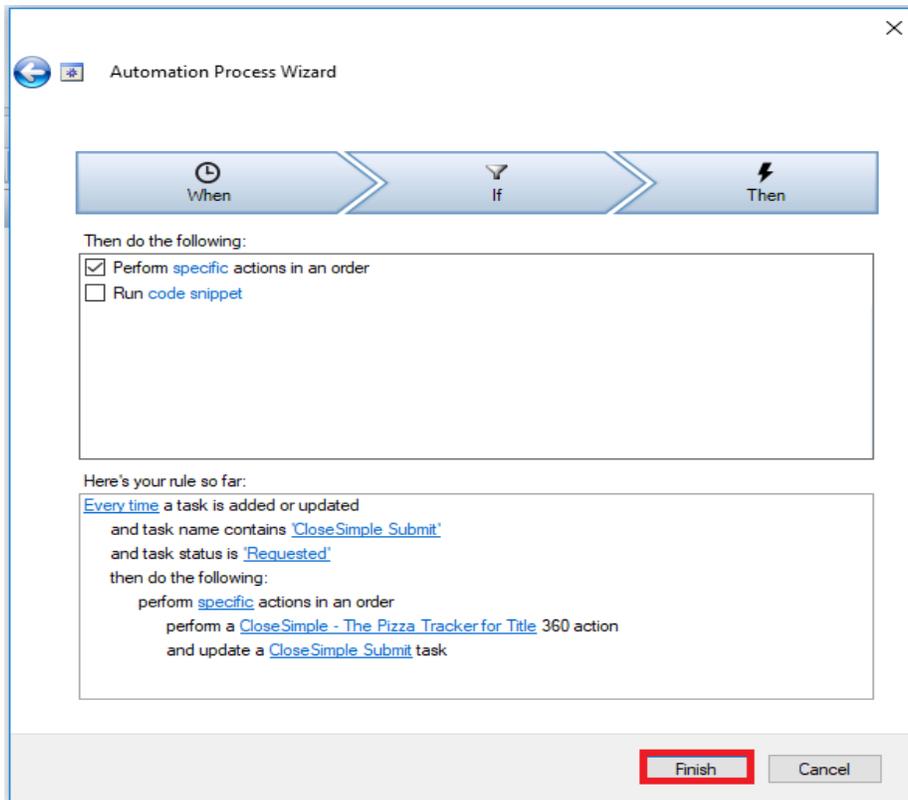


Figure 19 – Create Process -> Finish

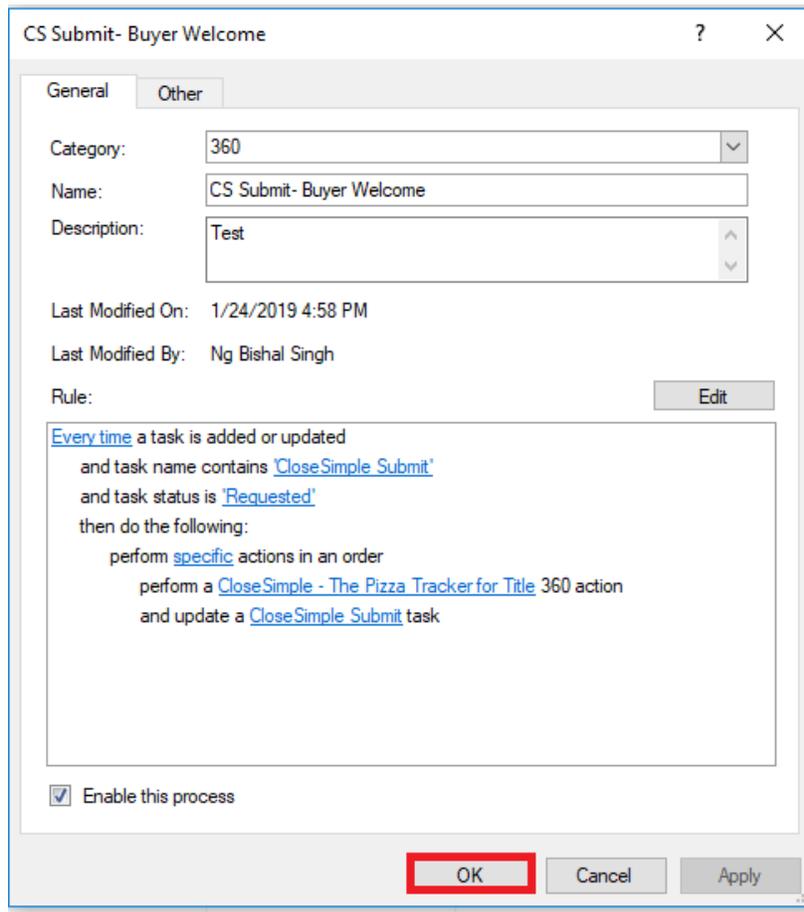


Figure 20 – Create Process -> Name and Enable the process

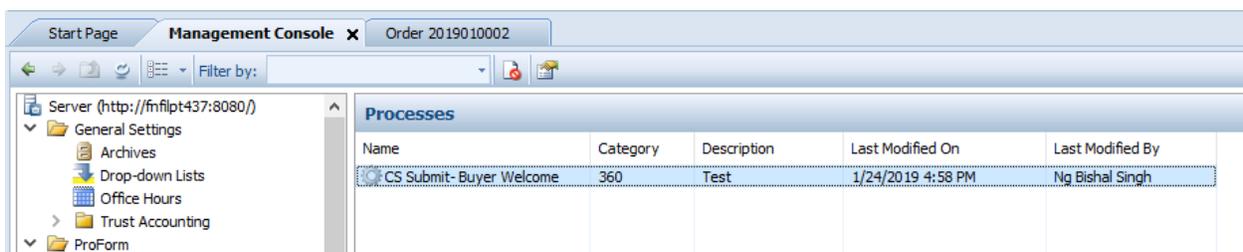


Figure 21- Process Instance is created

Trigger Submit Process

The Submit process created in the automation wizard triggers based on the status specified in the task created in the SoftPro order. Once the details are updated in the Select order, go to **Order -> Requested Tasks** and change the status of the task to **“Requested”**.

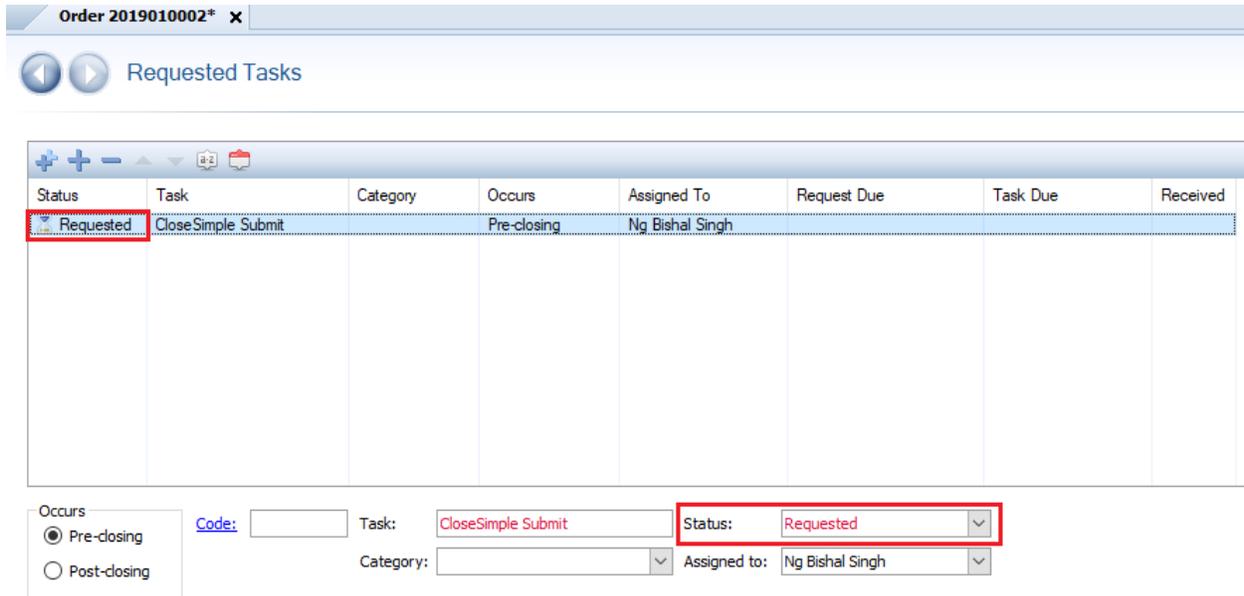


Figure 22 – Task Status- Requested

Save and close the Select order. The automation will be initiated and can be monitored from the Monitoring Console under **SP Admin -> Configuration -> Automation -> Monitoring**.

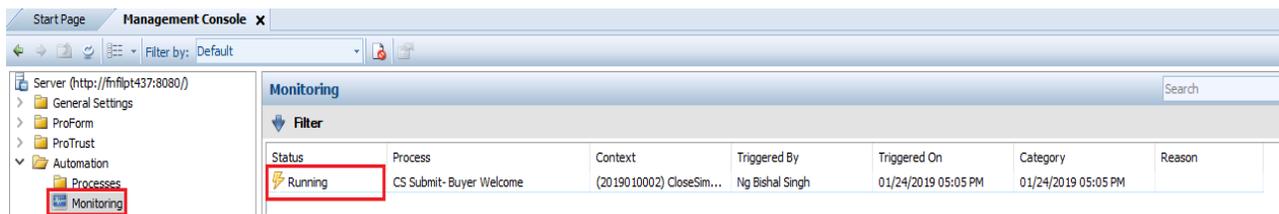


Figure 23 – Process Monitoring -> Running

Click **F5 to refresh** the status of the process. The concerned process will display status as **“Completed”** if executed successfully without any issues.

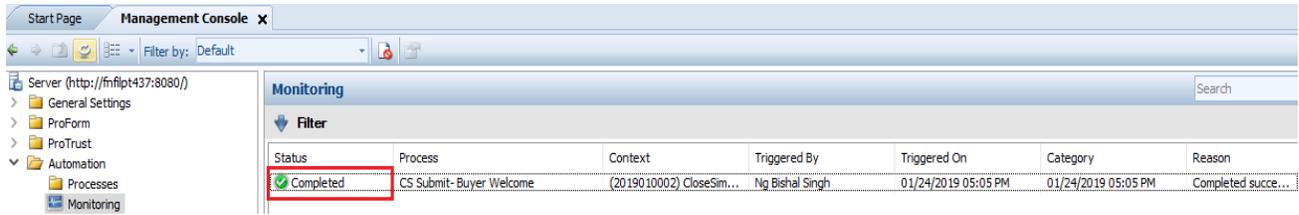


Figure 24 – Process Monitoring -> Completed

Open your SoftPro order again and navigate to **Order -> Requested Tasks** screen. The status of the Submit task will be updated to **“Received”**.

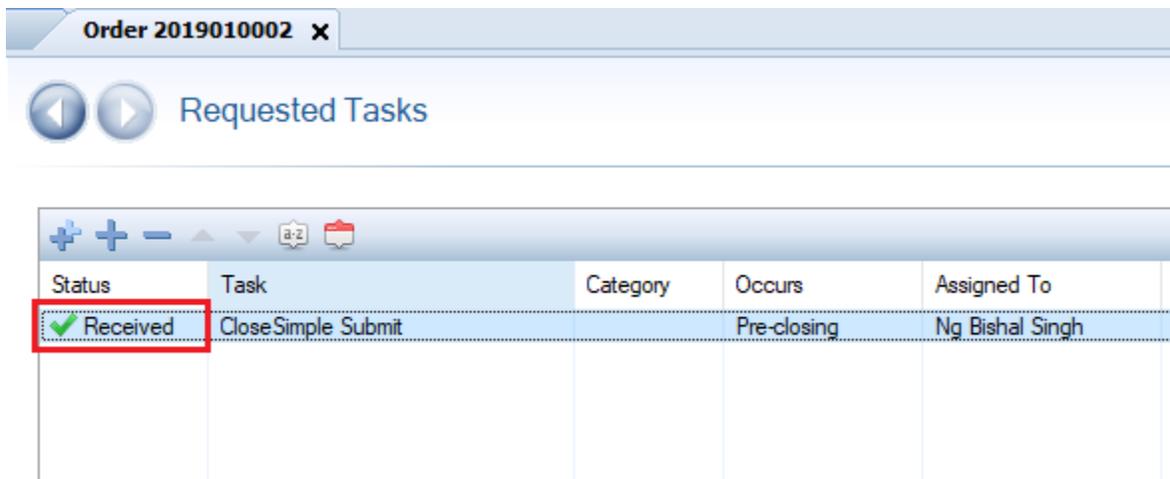


Figure 25 – Received Tasks -> Status Updated

Click on 360 tab from the top ribbon in SoftPro Select and access the **360 Queue** to access the transactions submitted to CloseSimple as a result of the successful Submit automation process.

The **‘Completed’** status indicated that the transaction was successfully submitted to CloseSimple.

The screenshot shows the SP360 Queue interface. At the top, the '360' tab is highlighted. Below it, the 'Queue' icon is also highlighted. The main area displays the 'Order 2019010001' details, including 'Express Order Entry' options like 'Rush order' and 'Transaction type' (Purchase). At the bottom, a 'Queue' table is visible with the following data:

Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On	Completed On	Description	Transaction Number
CloseSimple	The Pizza Tracker for Title	Completed	2019010001	Default	Ravindra	1/24/2019 9:33 PM	1/24/2019 9:34 PM		410060-70-190124-164323

Figure 26 – SP360 Queue -> Transaction Created