

CloseSimple - SoftPro360 Automation Integration (v1.0)

6

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4800 Falls of Neuse Road, Suite 400 | Raleigh, NC 27609 p (800) 848–0143 | f (919) 755–8350 | <u>www.SoftProcorp.com</u>

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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:

Order 2019010002	* ×		
	C Express	Order Entry	
rder Entry tion	Auto-publish to Soft	tPro Live	SoftP
s : & Earnest Money owledgment	Transaction type Purchase Refinance Equity Other	Commercial Construction Cash sale Out of coun	Order n Produ ty Policy
	Related order(s): Sales price:	\$250,0	01.00
 ▼ 	Description	Deposit Amount	Amt Returned to Buyer
÷	Deposit or earnest	m	
ıg 🔻	*		
	Settlement date/time:	01/31/2019 12:00	AM 🗸
	Due date/time:	01/31/2019 12:00	AM 🗸

Figure 1 - SoftPro Order Creation

C	Order Contacts	6			
	+ ∰ ☆				
1	Гуре	Name	Code	Phone	Email
	Attorney	Jack	AT		
	Buyer/Borrower	Finn Balor	В	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	Т		

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).

ProForm ProTrust ProDesig	n Pro1099 SPIm	nage SPAdmin 360	Order			
Register Cheddist Tasks Requested Tasks	My Screens	Documents Attachments	Document History Field Code Browser	 Apply Template Overlay Order ale Rename Order 	Submit View	360 Transactions
Quick Links		Docum	ents	Actions	Workflow Tra	insactions
Start Page Order 2019010002*	×					
General Carlos Control		ested Tasks				
Order Contacts	Status Task	t.	Cate	gory	Occurs	Assigned To
Property	Required Close	eSimple Submit			Pre-closing	
Sales Contract & Earnest Mo						
Notary & Acknowledgment						
Deed						
Affidavit						
Invoice						
Loan 💌						
Title 💌						
Escrow/Closing	Occurs Pre-closing	Code: Task	: CloseSimple Submit	Status	Required	~
HUD-1 Header	O Post-closing	Cate	egory:	✓ Assign	ed to:	\sim
City / Tarras Tarras						

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

ieneral	Blob Arch	ive C	Order Archive	SoftPro 360
Connecti	on Settings –			
Server:	https	://alpha.s	oftprohq.com	
STS:	https	://alpha.s	oftprohq.com:444	
Usemam	e: ravin	dra.r@fnf.	com	
Password	l:	•••		
Enabled:	V			
Advance	d Settinas			
Transacti	ion Query Re	tum Size	2000	
Product I	Lifespan (minu	utes)	1440	
Changes ma	ay take up to a r	ninute to tak	xe effect.	

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).

🕋 🗉 · 🖺 ·) =				
ProForm ProTi	rust ProDesign	Pro 1099	SPImage	SPAdmin	360
Configuration Reports) Export Data) Import Data , Licenses				
Start Page Orde	r 2019010002	Managemen	t Console 🗙		
🗢 🔶 🖄 🛫 🛤 🔻 Fi	lter by: Default		- 👌 🖆	ř	
Server (http://fnfilpt437	:8080/)	General S	ettings		
> ProForm		Name			
> 📔 ProTrust		Archives			
Automation		Drop-dowr	n Lists		
Processes		Office Hou	irs		
Monitoring		Trust Acco	ounting		
V Pro 1099					
T Security		1			

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).

Start Page Order 2019010002	Management Console 🗙
< 🇼 🖄 🛫 🔠 👻 Filter by: Default	- 3
Server (http://fnfilpt437:8080/)	Processes
 ProForm ProForm 	Name
Automation	New Process
Monitoring	New Process
 Pro1099 Security 	Click here to add a new automation process.
Croups	Press F1 for more help.
 Users Permissions 	

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.

🕒 🕢 Automation Process Wizard				x
G	Y		f	
When	lf		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:				
Every time a task is added or updated				
		Next	Ca	ncel
		<u> </u>		

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.

G 🕢 Automation Process Wizard				×
When And if these conditions are met: Task assigned to is specific value Task optency is concific value	∀ If		F Then	•
 Task category is specific value Task code contains specific value Task name contains specific value Task status is specific value Task type is specific value Order has the following criteria A code snippet evaluates to true 				11
Here's your rule so far: <u>Every time</u> a task is added or updated and task name contains <u>specific value</u> and task status is <u>specific value</u>				
		Next	> Ca	incel

Figure 9 – Create Process -> Add Conditions

lf	×
Task name contains	Add
CloseSimple Submit	Remove
Exact match only	OK Cancel

Figure 10 – Create Process -> Add Task Name

G 🐼 Automation Process Wizard

If	
	T
	lask status is
	(None)
	Required
	Requested
	Completed
	Received
	N/A
	OK Cancel

Figure 11 – Create Process -> Select Task Status

e	Y	4
When	lf	Then
And if these conditions are met:		
Field is specific value		
Task assigned to is specific value		
Task category is specific value		
Task code contains specific value		
✓ Task name contains specific value [Add]		
Task status is specific value		
Task type is specific value		
Order has the following criteria		
Here's vour nile eo far:		
Every time a task is added or updated		
and task status is 'Requested'		
and task name contains 'CloseSimple Submit'		

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.

1	(b)	\rightarrow	₩ If		F
less '	when	//	п	_//	men
Then do the fo	lowing:	-			
Perform sp	ecific actions in an	order			
Run code	snippet				
Here's your rule	so far:				
Every time a ta	sk is added or upd	lated			
and task na	ame contains <u>'Clos</u>	eSimple Submit			
	atus is specific val	ue			
and task st					
and task st then do the	following:				
and task st then do the perform	following: specific actions ir	n an order			
and task st then do the perform	following: specific actions in	n an order			
and task st then do the perform	following: specific actions ir	n an order			

Figure 13 – Create Process

ien	
Perform specific actions in an order	
Add a specific task	
Update a specific task [Add]	
Apply specific template	
Perform a specific 360 action	
Run code snippet	
Here's your rule so far:	
perform specific actions in an order	
perform a <u>specific</u> 3 <mark>60 action</mark>	
and update a <u>specific</u> task	

Figure 14 – Create Process -> Perform 360 action

Perform a 360 Action	×
✓ General	
Service	CloseSimple - The Pizza Tracker for Titl
Service Action	Submit Order
 Service Action Settings 	
Add To Proform Notes	Yes
AutomationCode	ABCTitle_BuyTimeline_Step01_BuyerWo
Documents	Commitment
Notes	This is test!
Password	7YtW@33tP1222
UserName	titleABC-SP
UserName UserName for Close simple	
	<u>Q</u> K Cancel

Figure 15 – Create Process -> Input details

Then	_		Х
Perform specific actions in an order			
Add a specific task			
Update a specific task [Add]			
Apply specific template			
Perform a specific 360 action			
Run code snippet			
Here's your rule so far:			
perform a Close Simple - The Pizza Tracker for Title 360 action			
and undate a specific task			
	or	Carro	-1
	<u>o</u> k	Lanc	er

Figure 16 – Create Process -> Update Task Status

Then					×
Update a tasl Task type:	Requested				~
Task code:					
Task name:	CloseSimple Subr	nit			
What would	you like to update	?			
🔽 Task sta	itus: Rec	ceived			\sim
📃 Task ca	tegory:				\sim
Assigne	d to:	None User Escrow officer Escrow assistant Title officer			~
Request	ed due date:				
Due dat	e:				
			0	<u>О</u> К	Cancel

Figure 17 – Create Process -> Select task and status

Then	-		×
Perform specific actions in an order Add a specific task Update a specific task [Add] Apply specific template Perform a specific 360 action Run code snippet			
Here's your rule so far: perform specific actions in an order update a CloseSimple Submit task			
and perform a <u>Close Simple - The Pizza Tracker for Title</u> 360 action			
	<u>О</u> К	<u>C</u> ano	el

Figure 18 – Create Process -> Confirm selection



Figure 19 – Create Process -> Finish

S Submit- Buyer W	?	\times	
General Other			
Category:	360	~	
Name:	CS Submit- Buyer Welcome		
Description:	Test	~ `]
Last Modified On:	1/24/2019 4:58 PM		
Last Modified By:	Ng Bishal Singh		
Rule:		Edit	
and task status then do the foll perform <u>spe</u> perform and upo	is <u>'Requested'</u> owing: <u>wcific</u> actions in an order a <u>CloseSimple - The Pizza Tracker for Title</u> 360 action date a <u>CloseSimple Submit</u> task		
Enable this pro	cess		
	OK Cancel	Ар	ply

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

Start Page Management Console	X Order 2019010002				
🗢 🧇 🖄 🛫 🗄 🕶 Filter by:	- 👌 🖀				
Server (http://fnfilpt437:8080/)	Processes				
Archives	Name	Category	Description	Last Modified On	Last Modified By
🛂 Drop-down Lists	CS Submit-Buyer Welcome	360	Test	1/24/2019 4:58 PM	Ng Bishal Singh
Office Hours					
Trust Accounting					
ProForm					



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**".

	Order 2019010002* X									
(Requested Tasks									
[* + - +									
	Status	Task	Category	Occurs	Assigned To	Request Due	Task Due	Received		
	🟅 Requested	CloseSimple Submit		Pre-closing	Ng Bishal Singh					
	Occurs Pre-closing	Code:	Task:	CloseSimple Submit	Status:	Requested				
	O Post-closing		Category:		 Assigned to: 	Ng Bishal Singh	×			

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.**

Start Page Management Console X							
🔶 🧼 🖄 🛫 👫 🔹 Filter by: Default	*	3					
Server (http://fnfilpt437:8080/)	Monitoring						Search
ProForm	🐳 Filter						
ProTrust Def Automation	Status	Process	Context	Triggered By	Triggered On	Category	Reason
Processes Monitoring	🖗 Running	CS Submit-Buyer Welcome	(2019010002) CloseSim	Ng Bishal Singh	01/24/2019 05:05 PM	01/24/2019 05:05 PM	

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.

1					
					Search
Process	Context	Triggered By	Triggered On	Category	Reason
CS Submit-Buyer Welcome	(2019010002) CloseSim	Ng Bishal Singh	01/24/2019 05:05 PM	01/24/2019 05:05 PM	Completed succe
	Process CS Submit- Buyer Welcome	Process Context CS Submit-Buyer Welcome (2019010002) CloseSim	Process Context Triggered By CS Submit-Buyer Welcome (2019010002) CloseSim Ng Bishal Singh	Process Context Triggered By Triggered On CS Submit- Buyer Welcome (2019010002) CloseSim Ng Bishal Singh 01/24/2019 05:05 PM	Process Context Triggered By Triggered On Category CS Submit-Buyer Welcome (2019010002) CloseSim Ng Bishal Singh 01/24/2019 05:05 PM 01/24/2019 05:05 PM



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

	Order 2019	010002 🗙						
Requested Tasks								
	*+-							
	Status	Task	Category	Occurs	Assigned To	I		
	✓ Received	CloseSimple Submit		Pre-closing	Ng Bishal Singh			

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.

ProForm ProTrust ProDesign Pro 10 660 O O O O O O O O O O O O O O O O O O	99 SPImage SPAdmin Part of the second secon	360 Order Publish Website Live	
Submit About Control Add-Ins Control Development Control Development	General Creation Contents Contents Contents Contacts Contract & Earnest Notary & Acknowledgment Deed Affidavit Invoice	Commercial Construction Construction Construction Construction Construction Construction Construction Cash sale Other	SoftPro Live template: Order type: Product type: Policy type:
Queue			
Provider Service Status L CloseSimple The Pizza Tracker for Title Completed 2	inked Order Linked Profile D19010001 Default	Created By Created On Completed On Ravindra 1/24/2019 9:33 PM 1/24/2019 9:34 PM	Description Transaction Number 410060-70-190124-164323

Figure 26 – SP360 Queue -> Transaction Created