

## Zoccam - SoftPro 360 Integration (v1.0)

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# **Table of Contents**

Introduction	4
Launching Zoccam Integration	5
Access from the 360 Queue	5
Review and Accept Data & Document(s)	6
Linking the request to a ProForm Order	7
Update Operation	12

# Introduction

The integration between Zoccam and SoftPro 360 will allow Zoccam to send Earnest money details to SoftPro 360 via an inbound submit. SoftPro will create a transaction ID and assign the EMD information to a new or an existing ProForm order. Zoccam will also have the ability to send updates to the earnest money deposits and documents.

### **Launching Zoccam Integration**

### Access from the 360 Queue

Click on the **360**  $\rightarrow$  **360 Queue menu** to view the inbound submit requests received from Zoccam. All the transactions will be visible in the queue. New transactions will have status = '**New'**.

1	H 💾 -	-	) =							
	ProForm	ProT	Trust ProDe	esign	Pro 1099	SPImage	S	PAdmin	360	
360	0 0	2	2	0	0		?	$\odot$		
Queue	Services Se	arch	Administration	Login	Logout	Information	Help	About	Publish	Website
Т	ansactions		Sec	urity		Res	ources		Li	ive

Figure 1 - SoftPro 360 Queue Menu

The 360 queue will have all the Zoccam requests listed along with their respective statuses. This is the starting point of this integration.

Queue												
📀 Next St	ер 🔘 🖂 [	Views: Search Results		- 🚖	· 🔯 📑 🛗	Filter:	Zoccam	•	° ≣	í.		
	Provider	Service	Status		Linked Order		Linked Profile	Transaction Num	ber			
	Zoccam	Earnest Money Platform	New					410060-70-18102	4-13628	81		

Figure 2 – 360 Queue -> New request from Zoccam

Once we receive the submit request from Zoccam, a new 360 transaction gets created for the same and it gets reflected in SoftPro system under **360 queue** with the status as '**New**'. Below stated information is captured in different columns (of 360 queue) from the inbound request. Users have the ability to sort the transactions as per any of these parameters.

- **Provider:** It shows the platform from which the request has come in into the SoftPro system.
- **Service:** Displays the name of the service.
- **Status:** This gives the information on the current status of the order.
- Linked Order: Once the transaction is linked to any ProForm order, the order number will reflect here.
- Linked Profile: Displays the name of the linked profile of the ProForm user.
- **Created By:** Displays the name of the person who created the transaction.
- **Created On:** Displays the date on which the transaction was received.
- **Description:** Displays the address of the property as specified in the submit request.
- **Contact:** Displays the name of the title company.
- **Provider Reference Name:** Displays the branch name of the title company.

- **Sent To:** Displays the profile ID name as specified in Zoccam request.
- Transaction Number: Displays the 360 Transaction number created on receiving new Zoccam request.

**Double-click** on the selected transaction OR click on the **"Next Step"** button to launch the 360 review screen.

Queue						
📀 Next Ste	ep 💿 🖂 🕻	Views: Search Results	- 🚖	Filter	Zoccam	• 🗳 🏭 🗔
	Provider	Service	Status	Linked Order	Linked Profile	Transaction Number
	Zoccam	Earnest Money Platform	New			410060-70-181024-136281

Figure 3 – 360 Queue ->Navigate to review screen

### **Review and Accept Data & Document(s)**

Zoccam will send data and document(s) which will be visible on the **360 Review Screen**. The Review screen allows the user to **review** the inbound data and documents being sent by Zoccam and **link** the details to a new/existing ProForm order. Document(s) can be viewed by clicking the **View** icon. Click **Accept** to add the data and document(s) to the linked ProForm order. The document(s) will be available from within the linked ProForm order by clicking on the **Attachments**. If the data and documents should not be accepted, the **Cancel** button closes the Review screen and no data or documents will reflect on the linked order. On clicking Accept, the transaction status is changed to **In Progress** in the 360 transaction queue.

seview						x									
로 Select All 🖹 Select	😨 Select All 🗟 Select None 📗 Field Codes 🛛 🌮 New Order 名 Order Search 🛛 Linked To:														
Groups	Groups Oata														
Al	<b>V</b>	Name	Current Value	New Value		-									
Earnest Money	Property Amount 700														
Borrowers	Borrowers Address1 123 Test														
Sellers  City  Dallas															
BuyerAgent State TX															
📝 Zip 75830 🔯 🗸															
				📝 Add To	Proform Note	s									
Name			Value			*									
Branch Name			Austin Demo			Ξ									
Profile Id			Internet			-									
Documents															
View Copy	Docume	ent Name F	File Name	File Size (KB)	Transferred										
	Image: Check front - 10020         check front - 10020 jpg         247         100%														
Overwrite Earnest N	Noney De	eposit(s)		C Accept	Overwrite Earnest Money Deposit(s)										

#### Figure 4 – 360 Review Screen

### Linking the request to a ProForm Order

### Scenario 1 – Link to a new ProForm Order

To link the Zoccam request to a new ProForm order, click on the **'New Order'** tab on the review screen. User will be redirected to the "New Order" screen as shown below.

New Order	×
Prefix:	Suffix:
Order number:	TestZoccam10202018
Trust account:	<b></b>
Settlement type:	Closing Disclosure
	Commercial
	HUD-1
Orders/Templates	to copy
Order/Template	
Order/ remplate	
	OK Cancel Help

Figure 5 – New order screen

Provide the necessary details on the new order screen and click the **'OK'** button. A new order will be created and the order number will reflect in the **'Linked To**' dropdown on the review screen.

🕹 Review - TestZoccar	m10202	018						2	٢.			
로 Select All 🖹 Select	None	🛄 Field Codes   🄗	New Ord	ler 🖌 Order Search	Linked 1	o: TestZoccar	m10202018	3	·			
Groups	Groups OData											
Al	<b>V</b>	Name		Current Value	Ne	w Value			<u>^</u>			
- Earnest Money		Amount	(		700			2	Ξ			
⊕- Borrowers		Address1			123	Test		2				
Sellers	<b>V</b>	City			Dal	as						
- BuyerAgent	<b>V</b>	State			TX							
		Zip			758	30		2	÷			
						🔽 Add To	Proform	Notes				
Name				Value					<b>^</b>			
Branch Name				Austin Demo					Ξ			
Profile Id				Internet					÷			
Documents												
View Copy	Docum	ent Name	File	e Name		File Size (KB)	Transferre	d				
	check-fr	ont-10020	che	ck-front-10020.jpg		247	100%					
Overwrite Earnest M	Overwrite Earnest Money Deposit(s)											

Figure 6 – Order Linking -> New Order

### Scenario 2 – Link to an existing ProForm order

To link the Zoccam request to an existing ProForm order, click on the **'Order Search'** tab on the review screen. User will be redirected to the ProForm 'Order Search' screen as shown below. Enter any search parameter and click **'Search'** to view the order matching the search parameters.

01 #			140 1 11 11		0.1.1		
Order #:	TestZoccam		Who has the file:	<b></b>	Order type:	×	Search for:
Settlement date:	(None) • thro	vugh (None)	Order status:	•	Product type:	•	Orders
Order reserved:	(None) • thro	ough (None) 💌	Escrow status:	•	Transaction type:	•	Templates
Order received:	(None)   thro	ough (None) 💌	Title status:	•	Title officer:	•	Reserved
Order completed:	(None)   thro	ough (None) 💌	Loan #:		Escrow officer:	•	
Project name:			Mtg. ins. case #:		Escrow assistant:		Exclude duplicates
roperty Information							
Address:				Subdivision/Tract:		Book:	
				Lot:		Page:	_
City/State/Zip:		· ·	E Foreign	Block:		Map reference:	
County:				Section:		Recorded: (None)	
APN/Parcel ID:				Phase:		through (None)	
Tax/Map ID:				Unit:		(None)	
Brief legal desc:				Building:			
itle Information							
Policy #:		Com	mitment #:				
ontact Information							
Contact type:		-					
Code:		Refe	rence #:				
Name:		Paye	e name:				

Figure 7 – Order Linking -> Existing Order -> Order Search Screen

On the 'Search Results' screen, select the order that you want to link to the submit request and click 'OK'.

arch Results			The rest of the			-				
Order Number	Settlement Date	Order Status	Project Name	Address	City	State	Zip	County	Lender Name	Buye
TestZoccam		In process		123 Test, New Address2	Dallas	ΤX	75830			Brya
TestZoccam 1234		In process		New Address1, New Address2	NewCity	NC	54321			Bıya
•										+
								OF	Cano	el

Figure 8 – Order Linking -> Existing Order -> Search Results Screen

The review screen will now display the selected ProForm order in the 'Linked To' dropdown. The 'Current Value' column will dislay the existing values from the ProForm order. The 'Field Code' column will display the path of each data element which will be mapped to the existing ProForm order.

The earnest money deposit value (Amount field) will **append** to the existing ProForm order by default. Checking the **"Overwrite Earnest Money Deposit(s)"** checkbox on the bottom of the review screen will allow you to view and overwrite the existing earnest money value in your ProForm order.

🐔 Select All 📑 Sele	ct None	Field Codes	S New Or	der 🕫 O	rder Search Link	ked To:	TestZoccar	m		•
Groups	O D	ata								
All		Name	Current	Value	Field Code		New Value			-
- EarnestMoney	2	Amount			SalesContract.	Earne	700		1	
- Borrowers	V	Address1	123 Test	i .	Properties[1].A	ddres	123 Test		2	1
Sellers	V	City	Dallas		Properties[1].A	ddres	Dallas			
BuyerAgent		State	TX		Properties[1].A	ddres	TX			
		Zip	75830		Properties[1].A	ddres	75830			-
							Add To	o Proform	Note	s
Name				Value						-
Branch Name				Austin De	mo					m
Profile Id				Internet						-
Documents										
View Copy	Docum	ent Name	Fi	e Name		R	le Size (KB)	Transferr	ed	-
	check-fr	ront-10020	ch	eck-front-1	0020.jpg	24	7	100%		
	checki	ont-10020	ch	eck-front-1	uuzu,jpg	24		10074		

Figure 9 – Review Screen -> Linked with existing PF order

Once the user clicks "Accept", the transaction status in 360 Queue will change to "In Progress".

Queue	Queue												
🔘 Next St	ep 🔘 🖂 📔	Views: Search Results	- 1	🕇 🔯 🐻 🛗 Filte	r: Zoccam	- 2 11 🗔							
	Provider	Service	Status	Linked Order	Linked Profile	Transaction Number							
	Zoccam	Earnest Money Platform	In Progress	TestZoccam	Default	410060-70-181024-136281							



# **Update Operation**

The integration provides Zoccam users with an ability to send updates to the data and document(s) of an existing 360 transaction. 360 supports updates to transactions whose status is set to **"In Progress" or "Accepted"**. The transaction can receive updates for **180 days** from the date of creation. Beyond 180 days, the transaction expires and its status changes to **"Completed**" in the 360 queue.

Queue						
🕑 Next St	tep 🔘 🖂 🖪	Views: Search Results	- 1	🗧 🐻 🐻 Filter	: Zoccam	- 🗳 🎫 🛱
	Provider	Service	Status	Linked Order	Linked Profile	Transaction Number
•	Zoccam	Earnest Money Platform	In Progress	TestZoccam	Default	410060-70-181024-136281

Figure 11 – 360 Queue

Once Zoccam sends an update to 360, the status of the transaction changes to 'Ready' and the 'Next Step' button is enabled for the user to launch the integration and review the changes.

Queue					
🛇 Next Step 💿 🖂	Views: Search Results		- 🚖 🔯 🖥 🛗	Filter: Zoccam	• 🗳 II 🗔
Provider	Service	Status	Linked Order	Linked Profile	Transaction Number
🧼 Zoccam	Earnest Money Platform	Ready	TestZoccam	Default	410060-70-181024-136281

Figure 12 – 360 Queue -> After receiving Update

Click the 'Next Step' button to redirect to the review screen. The review screen will display the updated values sent by Zoccam under the **'New Value'** column. Review and click '**Accept'** to update the new information to the linked order. Note that the 'Linked To' dropdown is disabled during update as one 360 transaction will always be linked to just one ProForm order.

The earnest money deposit value (Amount field) will **append** to the existing ProForm order by default. Checking the **"Overwrite Earnest Money Deposit(s)"** checkbox on the bottom of the review screen will allow you to view and overwrite the existing earnest money value in your ProForm order.

Review - TestZoccam										
Select All Select None Field Codes Wew Order Corder Search Linked To: TestZoccam										
All Name Current Value New Value										
Earnest Money		Amount		800	2	Ξ				
- Borrowers	<b>V</b>	Address1	123 Test	101 West Street						
Sellers	<b>V</b>	Address2	New Address2	Downtown						
BuyerAgent		City	Dallas	Raleigh						
	V	State	TX	NC						
	Zip			54321		Ŧ				
				Add To Proform	m Notes					
Name			Value			*				
Branch Name Austin Demo						-				
Documents										
View Copy	Docum	ent Name	File Name	File Size (KB) Transferred	ł	*				
	check-fr	ront-2561	check-front-2561.jpg	279 100%						
🐨 🖻 staal faat 25 staal faat 25 staal faat 25 staal										
Overwrite Earnest Money Deposit(s)										

Figure 13 – Review Screen

On click of 'Accept', the transaction status in the 360 queue will change to 'Accepted'.

Queue									
O Next S	tep 🔘 🖂 🚺	Views: Search Results	-	🚖 🔯 🐻 🛗 Filter	; Zoccam	- 2 II G			
Provider Service		Status	Linked Order	Linked Profile	Transaction Number				
	Zoccam	Earnest Money Platform	Accepted	TestZoccam	Default	410060-70-181024-136281			

Figure 14 – 360 Queue -> after accepting the updates

The "Accepted" documents will be saved in ProForm and will be visible under the "Attachments" section of the concerned ProForm order.

-	Crder TestZoccam - SoftPro Select								
	ProForm F	ProTrust	ProDesign	Pro 1099	SPIma	ige SPAd	lmin 360	Order	
Register	Checklist Tasks	Requested	Tasks Notes	My Sc Order	reens History	Documents	() Attachments	Document Hi	
Quick Links						Documents			
Start Page Order TestZoccam 🗙									
Gene	eral		<u>^</u>		Attachi	ments			

Figure 15 – Order Attachments

Attachments										
	6 B 🧑					Search	h			
						beare				
Attachments	Name	Description	Туре	Source	Size	Last Modified On	Last Modified By			
	Check-front-10014	check-front-100	JPEG image	Attached	279 KB	9/24/2018 6:52 PM	FIT2NET\PratiMav			
	E check-front-10014 (1)	check-front-100	JPEG image	Attached	279 KB	9/24/2018 6:55 PM	FIT2NET\PratiMav			
	Check-front-10020	check-front-100	JPEG image	Attached	247 KB	10/22/2018 5:18 PM	FIT2NET\PratiMav			
	check-front-10020 (1)	check-front-100	JPEG image	Attached	247 KB	10/22/2018 8:29 PM	FIT2NET\PratiMav			

Figure 16 – Order Attachments