



Service Order Products – Process in Snapclose

The purpose of this document is to provide detailed instruction on how to utilize the Back Office Production Services (BOPS), interfaces with AgentNet® on the Snapclose platform.

NOTE: Snapclose Pro Version 159.20 or later is required. Contact Snapclose Technical Support at: techsupport@snapclose.com or by phone at 877-476-2725-Option #2 to set up your appointment for Snapclose to be installed.

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Setup Preferences


Follow the steps below to setup your AgentNet account in Snapclose.

1. On the left navigation expand **Preferences** and select **User**.

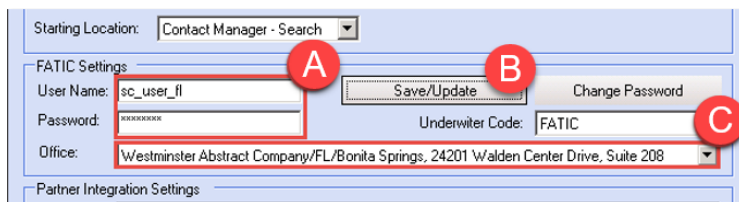


2. In the **FATIC Settings** section:

- A. Enter your AgentNet username and password

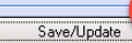
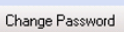
- B. Click 

- C. Select **Office**




Starting Location:

FATIC Settings

User Name:  

Password:

Underwriter Code: 

Office:

Partner Integration Settings

- D. Click  once again



Request Search Order

Follow the steps in this section to request a search order for a file. Begin with an existing file as you proceed through these steps.

New Service Request Order

1. In an existing file select the **First American** tab
2. Click the **New Order** button

The screenshot shows the 'Back Office Service Form' with a navigation bar at the top containing tabs: Profile, Orders & Reminders, Commitment, Invoice, HUD, Disburse, Policy, Docs, Notes, and First American. The 'First American' tab is highlighted. Below the tabs is a table with columns: Product, Request Date, Order ID, Order Number, and Order Status. A red circle with the number '1' points to the 'First American' tab, and another red circle with the number '2' points to the 'New Order' button at the bottom right of the form.

3. In the **New Order** section, choose the appropriate **Product**, **Property Type** and **Transaction Type**
NOTE: The Property Type and Transaction Type will auto populate based on your file details.

4. Enter the appropriate email address for all notifications regarding your request

NOTE: To add additional email addresses for notification separate them with a “;” *semicolon*.

5. Enter any comments in the **Notes** section as needed

NOTE: Additional land parcels can be added to the search order by including the details in the Notes section prior to submitting your order to AgentNet.

NOTE: To add documents prior to submitting a request proceed to the [Documents](#) section.

6. Click **Submit** to begin the Service Request.

The screenshot shows the 'New Order' form with the following fields and callouts:

- Callout 1: Points to the 'Product' dropdown menu.
- Callout 2: Points to the 'Property Type' dropdown menu.
- Callout 3: Points to the 'Transaction Type' dropdown menu.
- Callout 4: Points to the 'Email' text input field.
- Callout 5: Points to the 'Notes' text area.
- Callout 6: Points to the 'Submit' button at the bottom.

 The form also includes a 'Documents' section with a table for uploading documents and a 'Lenders' section with a checkbox for 'Bank of Tomorrow (Primary Lender)'.

NOTE: **Cancel** will clear out the request and take you to the Order Details view.

7. A dialog box and email will confirm the Service Order was submitted successfully.



Attach Documents

Follow the steps below to attach documents to be uploaded for submission on the new Service Request order.

NOTE: The document type **PDF** is the only type of document that can be attached and sent to the Service Request order. If the document you are attempting to attach is another type of document, you will need to convert it to **PDF** prior to attaching.

1. Click **Add Documents** to choose the documents which will be attached

NOTE: Documents must be attached to the file's **Docs** tab prior to adding documents to the Service Request.

2. A dialog box will open, select the documents needed for this request
3. Click **Add** to attach the document(s) to the Service Request

	Display Name	Date Created	Last Accessed	Last Accessed By	Created By
<input checked="" type="checkbox"/>	Demo Document	01/15/2015 2:47:09 ...	01/15/2015 2:47:09 ...	Enoch Wadsworth	Enoch Wadsworth
<input type="checkbox"/>	Demo 2 Document	01/15/2015	01/15/2015	Enoch Wadsworth	Enoch Wadsworth
<input checked="" type="checkbox"/>	Demo 3 Document	01/15/2015	01/15/2015	Enoch Wadsworth	Enoch Wadsworth

Add **Cancel**

4. Proceed to step 6 in the [New Service Request Order](#) section in this Job Aid

Order Details

The purpose of this section is to communicate the Order Progress, Documents, Notes and Contact Information.

NOTE: To update recent activity to this page, click **Refresh**.

Order Progress Details

View the status, order details and progress of the Service Request through the tracked tasks including comments from First American.

Order Details					
Status:	Open	Order Date:	2015-01-15T15:13:14	BOPS Order Number:	3271561
				Internal Order ID:	33031014
Order Progress Details					
Task Name	Start Date	Complete Date	Waived	Comments	Due Date
Order Received			No		
ESP Link Available in Comments			No		



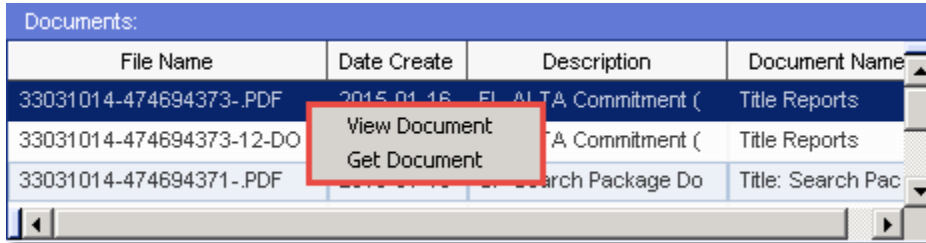
Documents

In this section you have the ability to view and save the completed documents from the Back Office Production Services as well as upload additional documents for the Service Request. Follow these steps to obtain a copy of the completed documents from Back Office Production Services.

1. In the **Documents** section, right-click on the desired document to either **View Document** or **Get Document**

NOTES:

- **View Document** will open the document for viewing
- **Get Document** will save the document to **Docs** tab in the file
- You can only View or Save one document at a time



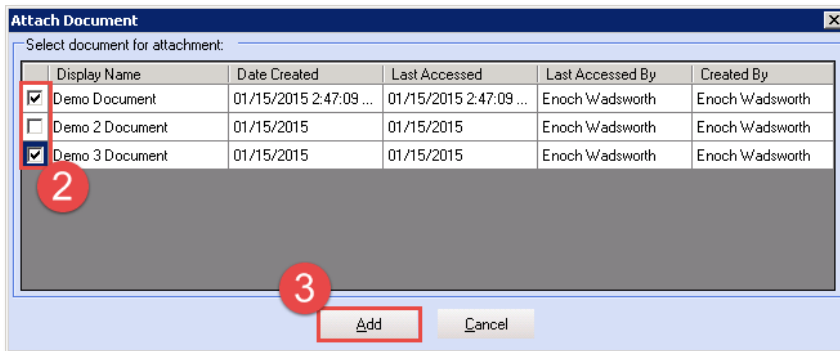
Follow these steps to add additional documents for the existing Service Request.

NOTE: The document type **PDF** is the only type of document that can be attached and sent to the Service Request order. If the document you are attempting to attach is another type of document, you will need to convert it to **PDF** prior to attaching.

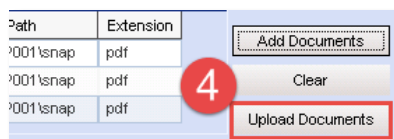
1. Click **Add Documents** to choose the documents which will be attached

NOTE: Documents must be attached to the file's **Docs** tab prior to adding documents to the Service Request.

2. A dialog box will open, select the documents needed for this request
3. Click **Add** to attach them to the existing Service Request



4. Click **Upload Documents** to finish adding the documents to the Service Request



NOTE: A Confirmation dialog window will appear when documents are successfully uploaded.



Notes

Enter any additional Notes needed to process your Service Order Request. A history of Notes will be displayed during the order process.

1. Enter additional Notes, if needed
2. Click **Update Notes**

Notes: 2 Update Notes

Add additional notes here. 1

EVALUATION, SCFL_User of Westminster Abstract
Company placed an order from AgentNet on 01/15/2015
03:13:09 PM PST. Agent's contact info is:
gkladovasilakis@gmail.com or 2132223333. AgentNet File

NOTE: To cancel a Service Order Request, enter a Note requesting to cancel the order or contact the representative located in the [Service Order Contacts](#) section.

Service Order Contacts

The primary contact for the Service Order will be displayed for your reference. All questions regarding this request should be directed to this contact.

Service Order Contacts			
Contact:	Central Florida Agency	Office Phone:	111.111.1111
		Office Fax:	
Email:	demo@firstam.com	Office Address:	