



# Setup Automation Process to Accept Closing Protection Letters in SoftPro 360®

Learn how to accept Closing Protection Letters using the AgentNet Automation feature in SoftPro 360®.

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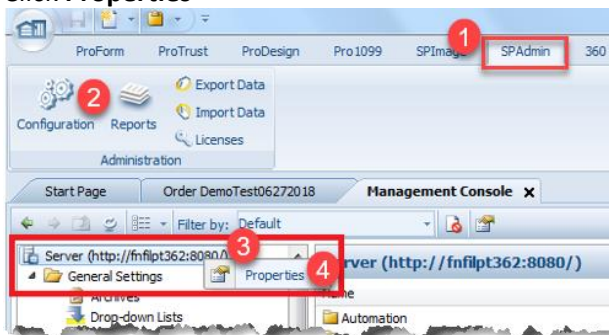
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## Set-up Connection Settings

To trigger the automation process, you must set-up connection settings in the SoftPro Admin screen.

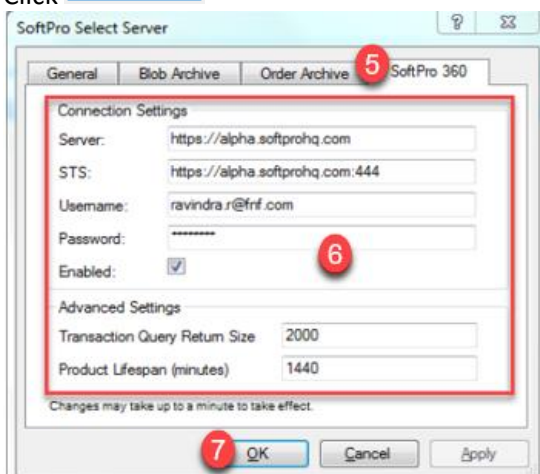
Beginning from the SoftPro main screen:

1. Click **SP Admin**
2. Click **Configuration**
3. Navigate to **Server** to verify and right-click the server name
4. Click **Properties**



**NOTE:** The SoftPro Server window opens displaying General, Archive and SoftPro 360 tabs.

5. Click **SoftPro 360** tab
6. Update/verify necessary **Connection/Advanced Settings**
7. Click **OK**







**NOTE:** Verify that your **SoftPro 360** user credentials are entered in this window.



## Create New Accept Automation Process

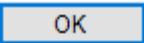
Follow the steps below in the Automation Process Wizard to create a new process for Accept automation.

1. From the **SP Admin** screen, click  Configuration
2. Double-click  Automation
3. Double-click  Processes
4. In the available white space, right-click to open the **New Process** widget
5. Click  New Process

**NOTE:** The Automation Process Wizard opens, displaying the **When** process screen. The requested process is set to start when one of the various options is selected.

6. In the **When** screen:
  - a. Select **360 transaction is updated** option
  - b. Click [specific](#) hyperlink in the rule below
  - c. In the **When** window, select the Service option, **FATIC – Closing Protection Letter**
  - d. Click **OK** to return to the Automation Process Wizard
  - e. Click **Next**

**NOTE:** The Automation Process Wizard moves to the **If** screen. This screen displays various options to process if certain conditions are met.

7. In the **If** screen:
  - a) Select ☐ 360 transaction status is [specific value](#)
  - b) Click [specific value](#) hyperlink
  - c) In the **If** window, **360 transaction status is**, click ☐ Ready
  - d) Click  to return to the Automation Process Wizard

**NOTE:** The condition is updated in the rule at the bottom of the screen, according to your selection. Status is set to 'Ready.'

- e) Click 



8. In the **Then** screen:

- a) Select ☐ Perform a **specific** 360 action

**NOTE:** The action is updated in the rule at the bottom of the screen, according to your selection. This is the action to perform with the service.

- b) Click **specific** hyperlink to open the **Perform a 360 Action** window

- c) Verify **Service** as **FATIC – Closing Protection Letter**

- d) Click **Service Action** and select **Accept**

**NOTE:** **Service Action Settings** are displayed on screen, according to your selections.

- e) Click **OK** to return to the Automation Process Wizard

The dialog box titled "Perform a 360 Action" has a close button (X) in the top right. It contains three main sections: "General", "Service Action Settings", and "Service Action". In the "General" section, the "Service" dropdown is set to "FATIC - Closing Protection Letter" (marked with a red circle 'c'), and the "Service Action" dropdown is set to "Accept" (marked with a red circle 'd'). The "Service Action Settings" section shows "Documents" set to "Accept Documents". The "Service Action" section at the bottom contains the text "The action to perform with the service". At the bottom right, the "OK" button is highlighted with a red circle 'e' and a red rectangle.

**NOTE:** The rule at the bottom of the screen is updated, according to your selections, and is ready to process.

- f) Click **Finish**

The "Automation Process Wizard" dialog box shows a flow from "When" to "If" to "Then". Under "Then do the following:", the option "Perform a specific 360 action" is selected. Below this, a yellow box displays the rule: "When a FATIC - Closing Protection Letter 360 transaction is updated and 360 transaction status is 'Ready' then do the following: perform a FATIC - Closing Protection Letter 360 action". At the bottom right, the "Finish" button is highlighted with a red rectangle.



9. In the **New Automation Process** window/**General** tab:

- a) Select **Category: 360** from the dropdown menu
- b) Enter name of new automation process

- c) Click ☒ **Enable this process**
- d) Click **OK**

**NOTE:** The new automation process is displayed in the **Processes** window.

## Activate Accept Automation Process

The Accept process created in the Automation Wizard will be triggered when AgentNet sends a completed CPL to SoftPro 360 and the transaction status changes to 'Ready'.

1. Click **Order** tab

Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On	Completed On	Description
FATIC	Closing Protection Letter	Ready	CMH2020030015	Default	Christine Heffner	3/24/2020 12:09 PM	3/24/2020 12:1...	LENDER

**NOTE:** The Accept process will automatically retrieve the 'Ready' transactions and accept the document.



## Optional Monitor Automation Progress

1. Navigate to **SP Admin** tab



2. Click

3. In **Management Console** screen, double-click **Automation**

4. In the **Automation** folder, double-click **Monitoring**

Status	Process	Context	Triggered By	Triggered On	Catego
Completed	CPL Accept CMH	(CMH2020040034) 607...	System Account	04/08/2020 10:32 AM	360

**NOTE:** The status will reflect as 'Completed' if the process is finished successfully without errors.

## View Document Attachments

To view the documents accepted as a result of the successful execution of the Accept Automation process, follow these steps:

1. Click **Order** tab

2. Click **Attachments**

Name	Description	Type	Source	Size	Last Modified On	Last Modified By
CPL-39568959_a659dfd1-15cf-4496-8c8d-7b...	CPL-39568959_...	Adobe Acrob...	Attached	93 KB	4/8/2020 10:32 AM	Automation