



Setup Automation Process to Submit Policy Upload Orders in SoftPro 360®

Learn how to submit policy upload orders using the AgentNet Automation feature in SoftPro 360®.

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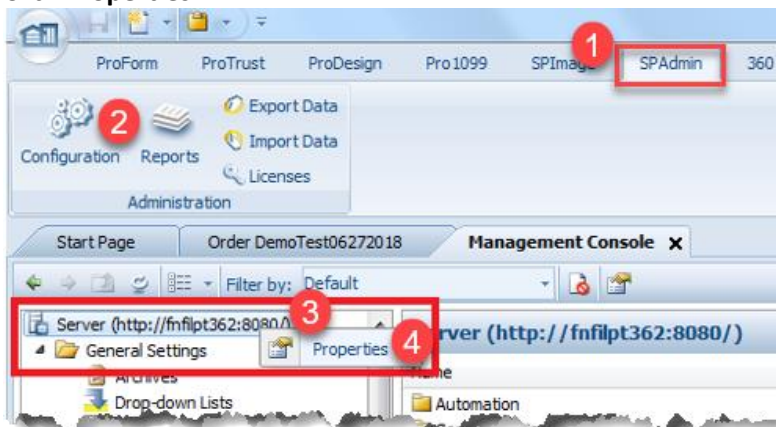
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Set-up Connection Settings

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**

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SoftPro Select Server

General Blob Archive Order Archive **5** SoftPro 360

Connection Settings

Server:

STS:

Username:

Password:

Enabled: ☒ **6**

Advanced Settings

Transaction Query Return Size:

Product Lifespan (minutes):

Changes may take up to a minute to take effect.

7 OK Cancel Apply


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

Activate Policy Upload Automation Process

Automation processes can be triggered in many ways. To trigger the automation process using a task, follow the steps below.

Create a Trigger Task

Beginning from the SoftPro main screen:

1. Click **Order**
2. Click **Requested Tasks**
3. In the **Requested Tasks** screen, click  to add a task to be used to trigger the Submit automation
4. Select/verify **Occurs** option: 'Post Closing'
5. Enter your **Task** name
6. Select **Required** in **Status** drop-down

ProForm ProTrust ProDesign Pro 1099 SPImage SPAdmin 360 **Order** **1**

Register Checklist Tasks **Requested Tasks** **2** Notes My Screens Order History Documents Attachments Document History Apply Template Overlay Order Submit View Transactions 360

Quick Links Documents Actions Workflow Transactions

Start Page ProForm Search Order 2020020173* x Web Page Blocked Navigation Canceled Management Console

General

Express Order Entry

Order Information

Status

Order Contacts

Property

Sales Contract & Earnest Money

Escrow/Closing

Requested Tasks **3**

Status	Task	Category	Occurs	Assigned To	Request Due
Required	Policy Upload		Post-closing		

Occurs

☐ Pre-closing

☒ **Post-closing** **4**

Code: **5**

Category:

Status: **6**

Assigned to:

Requested

Fee

Line:

NOTE: Trigger tasks can be inserted into the **Code Lookup Table**, **Master** or **Template** file. See [Initiate Submit Automation Process](#) section below.

Create New Submit Automation Process

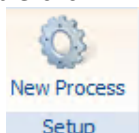
Follow the steps below in the Automation Process Wizard to create a new process for Submit automation process.

1. From the **SP Admin** screen, click



2. Double-click **Automation**

3. Double-click **Processes**



4. Click **Setup**

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.

5. In the **When** screen:

- a) Select ☒ **Task is added or updated**

NOTE: The condition is added to the rule at the bottom of the screen.

- b) Click **First time** hyperlink in the rule

The screenshot shows the 'Automation Process Wizard' window with the 'When' tab selected. Under 'Start this process when:', the option 'Task is added or updated' is selected and marked with a red 'a'. Below, the rule summary shows 'First time a task is added or updated' with a red 'b' pointing to the 'First time' hyperlink. The 'Next >' button is highlighted.

- c) In the **When** window:

- i) Select **Every time** frequency option
- ii) Click **OK** to return to the Automation Process Wizard

- d) Click **Next >**

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

6. In the **If** screen:

- a) Select ☒ **Task name contains specific value** [Add]

- b) Click **specific value** hyperlink in the rule next to 'task name contains'



- c) In the **If** window:
- i) In the **Task name contains** field, enter name of the new task created: *'Policy Upload'*
 - ii) Click
 - iii) Click **Exact match only** checkbox
 - iv) Click to return to the Automation Process Wizard
- d) In the Automation Process Wizard screen, click ☒ **Task status is specific value**
- e) Click task status is [specific value](#) hyperlink in the rule

Automation Process Wizard

When If 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 **d**
- ☐ Task type is specific value
- ☐ Order has the following criteria

Here's your rule so far:

Every time a task is added or updated
and task name contains "Policy Upload"
and task status is [specific value](#) **e**

Next > Cancel

- f) In the **If** window, Task status is:
- i) Click ☒ **Requested**
 - ii) Click to return to the Automation Process Wizard
- NOTE:** All conditions are updated in the rule at the bottom of the screen, according to your selections.

Automation Process Wizard

When If 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 your rule so far:

Every time a task is added or updated
and task name contains "Policy Upload"
and task status is Requested

Next > Cancel

- g) Click

7. In the **Then** screen:

- a) Select ☒ **Perform specific actions in an order**
NOTE: This is the action to perform with the service.

- b) Click [specific](#) hyperlink in the rule

c) In the **Then** window:

- i) Click ☒ **Perform a specific 360 action**
 ii) Click [specific](#) hyperlink in the rule below

(1) In the **Perform 360 Action** window:

- (a) Click **Service** to activate the dropdown field
 (b) Select **FATIC- Policy Image Upload**
 (c) Click **Service Action** to select **Submit Order**
 (d) Enter your AgentNet Username
 (e) Enter your AgentNet Password
 (f) Enter **Document Name(s)** to retrieve the matching documents

NOTE: Refer to [Create Document Attachments](#) section below for further instruction. Multiple document names can be added.

- (g) Select appropriate **Search Type**

- (h) Click **OK** to return to the Automation Wizard



8. In the **Then** screen:

- a) Select ☒ Update a [specific task](#) [\[Add\]](#)
- b) Click [specific](#) hyperlink in the rule

Then

Perform specific actions in an order

- ☐ Add a [specific task](#)
- ☒ Update a [specific task](#) [\[Add\]](#) **a**
- ☐ 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 [FATIC - Policy Image Upload](#) 360 action

and update a [specific task](#) **b**

OK Cancel

c) In the **Then** window:

- i) Select the **Task Type**: 'Requested'
- ii) Enter the **Task Name**: 'Policy Upload'
- iii) Click the **Task Status** checkbox, select 'Received'
- iv) Click **OK** to return to the Automation Process Wizard

Then

Update a task

Task type: Requested **i**

Task code:

Task name: Policy Upload **ii**

What would you like to update?

☒ Task status: Received **iii**

☐ Task category:

☐ Assigned to: ☐ None ☐ User

☐ Due date:

i **v** OK Cancel

d) Click **OK** to close the Automation Process Wizard

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

e) Click **Finish**

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 specific value
and task status is 'Requested'
then do the following:
perform specific actions in an order
perform a FATIC - Policy Image Upload 360 action
and update a Policy Upload task

Finish Cancel

- f) In the **New Automation Process** window/General tab:
- Select **Category: 360** from the dropdown menu
 - Enter name of new automation process: 'AgentNet_PolicyUpload'
 - Click ☒ **Enable this process**
 - Click **OK**

New Automation Process

General Other

Category: 360

Name: AgentNet_PolicyUpload

Description:

Last Modified On: (none)

Last Modified By: (none)

Rule: Edit

Every time a task is added or updated
and task name contains 'Policy Upload'
and task status is 'Requested'
then do the following:
perform specific actions in an order
perform a FATIC - Policy Image Upload 360 action
and update a Policy Upload task

☒ Enable this process

OK Cancel Apply

NOTE: The new automation process is displayed at the top of the **Processes** window.



Document Upload Requirements

- Actual Match:
 - User should provide complete name of the document with the extension
 - Document name is case sensitive in case of actual match
 - **Example:** Doc name in ProForm is First_American.pdf -> the exact same name will be expected in actual match
 - Supported formats:
.png, .jpg, .jpeg, .bmp, .pdf, .tif, .tiff, .doc, .docx, .csv, .xls, .xlsx, .rtf, .txt, .xps, .wps, .odt, .wpd, .pl
- Partial Match:
 - User should be able to submit the document if partial name of the document is provided
 - Document extension is not needed for partial match
 - Document name is not case sensitive for partial match
 - **Example:** Doc name in ProForm is "First American.pdf" -> Configuring 'First', 'first', 'American', 'american', 'Fir' are all valid scenarios
 - Supported formats:
.png, .jpg, .jpeg, .bmp, .pdf, .tif, .tiff, .doc, .docx, .csv, .xls, .xlsx, .rtf, .txt, .xps, .wps, .odt, .wpd, .pl



Initiate Submit Automation Process

The Submit process created in the automation wizard activates based on the status specified in the task created in the SoftPro order. Before initiating the Submit Automation process, Policy schedules should be published to ProForm Attachments. For assistance with publishing to attachments, refer to [Create Document Attachments](#) section below. Once the details are updated in the SoftPro order, follow these steps to initiate the Submit Automation process.

Beginning from the SoftPro main screen:

1. Click **Order** tab
2. Click **Requested Tasks** tab
3. Select **Status: 'Requested'**

The screenshot shows the SoftPro 360 interface. At the top, the 'Order' tab is selected (marked with a red circle 1). Below the tabs, the 'Requested Tasks' section is active (marked with a red circle 2). A table lists tasks with columns: Status, Task, Category, Occurs, and Assigned To. The first row shows 'Requested' status, 'Policy Upload' task, and 'Sharon Evans-Scott' as assigned. Below the table, the 'Requested' task details are shown. The 'Status' dropdown menu is open, showing options: (None), Requested, and Received. The 'Requested' option is highlighted (marked with a red circle 3).

4. Save and close your SoftPro order

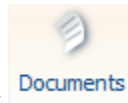
NOTE: The automation will be initiated and can be monitored from the Monitoring Console. See [Monitoring Automation Progress](#) below.



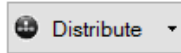
Optional

Create Document Attachments

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

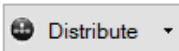


1. From the **Order** tab, click
2. In the **Documents** screen, double-click the applicable policy



3. Highlight the selected policy, click

4. Click ☒ **Publish**



5. Click
6. Complete prompts as needed
7. In the **Publish To Order** window, enter **Name** and **Description** as needed
NOTE: Policy Name can contain parenthesis and apostrophes, but not '&'.
8. Click **OK**
9. Click **Order** tab
10. Click **Attachments**

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	Category
Completed	AgentNet - BOPS Accept	(Boptest2) 410060-70-20010...	System Account	1/6/2020 5:02:00 PM	360
Completed	AgentNet_PolicyUpload	(AgentNet-Demo-UT) PolicyU...	Pratik Mavani	1/6/2020 3:50:00 PM	360

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



Submission Failures

It is possible that you may encounter some error messages during this process. Below are common submission failure reasons and actions to resolve them.

Status	Description	Action/Resolution
Server Path Error <i>'No Active Client could be found'</i>	<ul style="list-style-type: none"> System is pointing to the wrong active server Server location path is entered incorrectly 	Go to SoftPro 360 tab in the Select Server window to update server information. NOTE: To verify the correct server information, go to the 360 tab from the main screen, click About tab.
Pending Work Message <i>System is unable to acquire lock on context order'</i> is displayed in the Monitoring screen.	There is pending automation work for the selected file policy upload process. The process cannot continue until further action is taken.	Close the opened Order. The process will continue once this is done.
Can't Access Automation <i>'No Active Client could be found'</i>	SoftPro username and password are incorrect.	Go to the SoftPro 360 tab in the Select Server window to update SoftPro username and password.
Can't Access AgentNet <i>'No Active Client could be found'</i>	AgentNet username and password are incorrect.	Go to the Perform a 360 Action screen in the Processes folder to update the username and password.