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®.
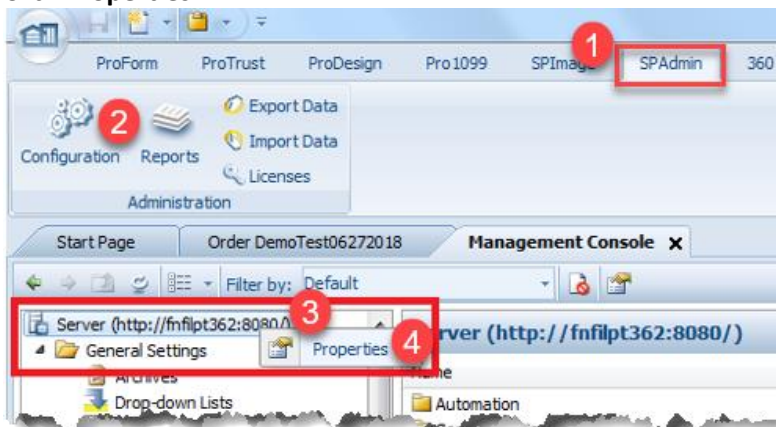
Contents

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.

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

NOTE: Trigger tasks can be inserted into the **Code Lookup Table**, **Master** or **Template** file. See Initiate Submit Automation Process section below.
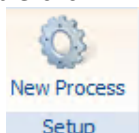
Create New Submit Automation Process

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 [Configuration icon]
2. Double-click [Automation folder icon]
3. Double-click [Processes folder icon]
4. Click [New Process Setup icon]

   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

   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 `Add`

    iii) Click **Exact match only** checkbox

    iv) Click `OK` 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

f) In the **If** window, Task status is:

    i) Click ☑ Requested

    ii) Click `OK` 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.

g) Click `Next >`

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

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

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**

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

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*'
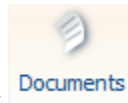

4. Save and close your SoftPro order

   NOTE: The automation will be initiated and can be monitored from the Monitoring Console. See Monitoring Automation Progress below.
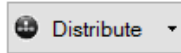
Optional
Create Document Attachments

To view the documents accepted as a result of the successful execution of the Accept Automation process, follow these steps:
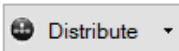
1. From the **Order** tab, click [Documents icon]
2. In the **Documents** screen, double-click the applicable policy
3. Highlight the selected policy, click [Distribute button]
4. Click [✓ Publish]
5. Click [Distribute button]
6. Complete prompts as needed
7. In the **Publish To Order** window, enter **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 [Configuration icon]
3. In **Management Console** screen, double-click [Automation folder icon]
4. In the **Automation** folder, double-click [Monitoring icon]

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 *'No Active Client could be found'*	• 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 *System is unable to acquire lock on context order'* 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 *'No Active Client could be found'*	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 *'No Active Client could be found'*	AgentNet username and password are incorrect.	Go to the **Perform a 360 Action** screen in the **Processes** folder to update the username and password.