



# Setup Automation Process to Accept Searches and Commitments in SoftPro 360®

Learn how to accept Searches and Commitments using the AgentNet Automation feature in SoftPro 360®.

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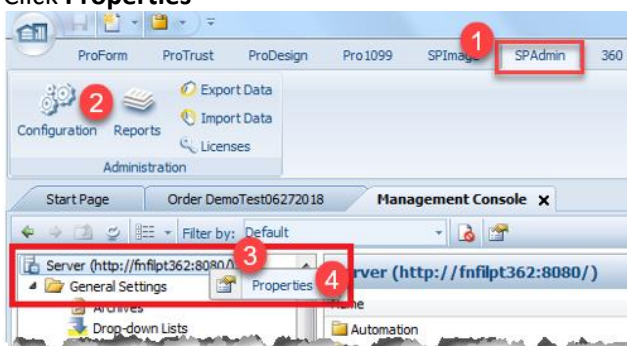
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## Set-up Connection Settings

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

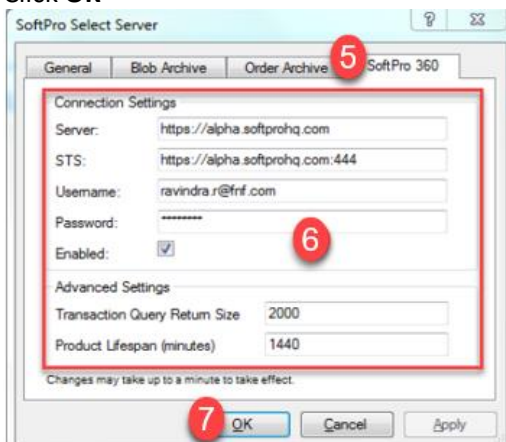
Beginning from the SoftPro main screen:

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 process.



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
  - c. In the **When** window, Select the Service option, **FATIC – Searches and Commitments**
  - 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**  
**NOTE:** The condition is added to the rule at the bottom of the screen.
  - b. Click 360 transaction status is [specific value](#) hyperlink
  - c. In the **If** window, **360 transaction status is**, click ☒ **Ready**
  - d. Click **OK** 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 – Searches and Commitments**

- d. Click **Service Action** to select **Accept**

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

- e. In the **Service Action Settings**, select appropriate **Accept Data** option

**NOTES:**

- **Accept Data** – Data fields will be imported into your SoftPro order if you select “*Overwrite Data*”
- **Accept Documents** – Supporting documents will be imported into your SoftPro order if you select “*Accept Documents*”
- **Overwrite Requirements/Exceptions** – Select ‘Yes’ if you wish to **overwrite** existing requirements and exceptions in your ProForm order. If you select ‘No’, the requirements/exceptions will be **appended** in your ProForm order.

- f. Click **OK** to return to the Automation Process Wizard

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

- g. Click **Finish**



9. In the **New Automation Process** window/General tab:
  - a. Select **Category: 360** from the drop-down 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 complete order to SoftPro 360 and the transaction Status changes to 'Ready'.

1. Click **Order** tab

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

2. Click  to close the Order screen

**NOTE:** The Accept Automation is initiated. The order can be monitored from the Management Console.



## Optional Monitor Automation Progress

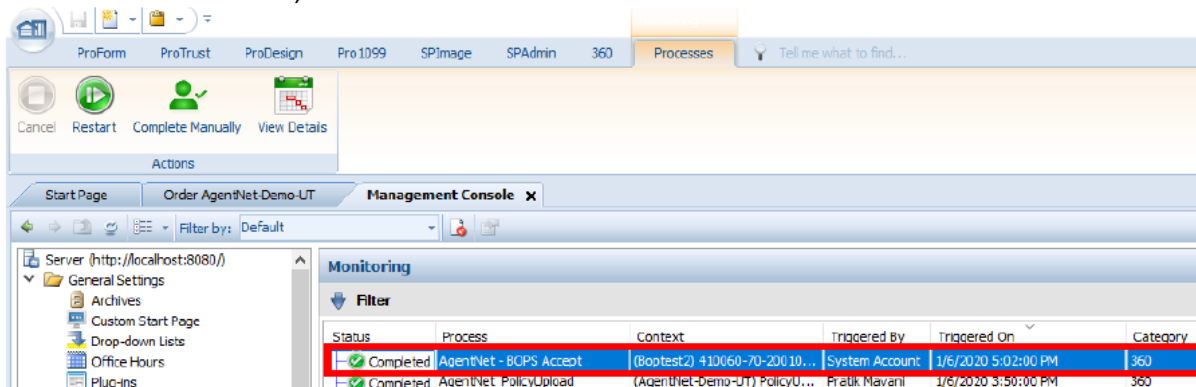
1. Navigate to **SP Admin** tab



2. Click **Configuration**

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

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



**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**