



# Setup Automation Process to Submit Closing Protection Letter Orders in SoftPro 360®

Learn how to submit Closing Protection Letter (CPL) orders using the AgentNet Automation feature in SoftPro 360®.

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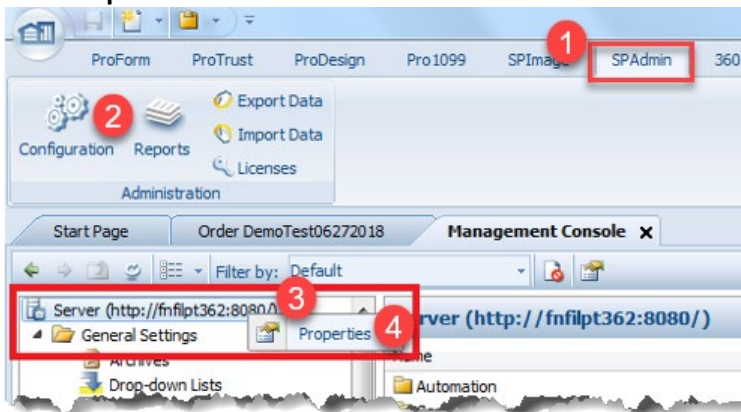
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## Set-up Connection Settings

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



SoftPro Select Server

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

Connection Settings

Server: https://alpha.softprohq.com

STS: https://alpha.softprohq.com:444

Username: ravindra.r@fnf.com

Password: \*\*\*\*\*

Enabled: ☒ **6**

Advanced Settings

Transaction Query Return Size 2000

Product Lifespan (minutes) 1440

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 Submit Automation Process for CPL

Automation processes can be triggered in many ways. To trigger the Submit 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. Verify **Occurs** option is **Pre-closing**
5. Enter your **Task** name
6. Select **Required** in **Status** drop-down

ProForm ProTrust ProDesign Pro1099 SPImage SPAdmin 360 **Order** **1**

Register Checklist Tasks Requested Tasks **2** Notes

Quick Links Documents Attachments Document History Field Code Browser Apply Template Overlay Order Rename Order Submit View Transactions

ProForm Search Order 2020020173\* x

General

Express Order Entry Order Information Status Order Contacts Property Sales Contract & Earnest Money Notary & Acknowledgment

Title

Escrow/Closing

Requested Tasks

Status	Task	Category	Occurs	Assigned To
Requested	Policy Upload		Post-closing	Sharon Evans-Scott
Required	NC-CPL_Submit		Pre-closing	

Occurs

☒ Pre-closing **4** ☐ Post-closing

Code: Task: NC-CPL\_Submit **5** Status: Required **6**

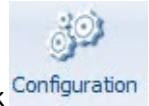
Category: Assigned to:

**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** in the upper left corner

**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

**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**

b) Click [specific value](#) hyperlink in the rule next to 'task name contains'

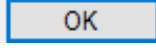


c) In the **If** window:

i) In the **Task name contains** field, enter name of the new task created in **Step 5** in [Create a Trigger Task](#)

ii) Click 

iii) Click **Exact match only** checkbox

iv) Click  to return to the Automation Process Wizard

d) Click ☒ Task status is [specific value](#)

e) Click [specific value](#) hyperlink in the rule



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.

The screenshot shows the 'Automation Process Wizard' window with the 'If' tab selected. The 'When' tab is also visible. The 'If' tab contains a list of conditions under the heading 'And if these conditions are met:'. The conditions are:

- ☐ 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

Below the list, a red box highlights the summary text: 'Here's your rule so far: Every time a task is added or updated and task name contains 'NC-CPL Submit' and task status is 'Requested''. At the bottom right, there are 'Next >' and 'Cancel' buttons.

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

The screenshot shows the 'Automation Process Wizard' window with the 'Then' tab selected. The 'When' and 'If' tabs are also visible. The 'Then' tab contains a list of actions under the heading 'Then do the following:'. The actions are:

- ☒ Perform specific actions in an order **a**
- ☐ Run code snippet

Below the list, a red box highlights the summary text: 'Here's your rule so far: Every time a task is added or updated and task name contains 'NC-CPL Submit' and task status is 'Requested' then do the following: perform specific actions in an order'. At the bottom right, there are 'Finish' and 'Cancel' buttons.



i) In the **Then** window:

- 1) Click ☐ **Perform a specific 360 action**
- 2) Click **specific** hyperlink in the rule

ii) In the **Perform a 360 Action** screen:

- 1) In the **Service** field, select **FATIC- Closing Protection Letter**
- 2) In the **Service Action** field, select **Submit Order**
- 3) Complete all **Service Action Settings** with your First American Technical Trainer

**NOTES:**

- Enter your **AgentNet UserName** and **Password**
- For **Account Number**, **Office ID** and **Approved Attorney ID** and/or **Second Party**:
- You can enter the Account number or ID in each respective field, or in any relevant field in your order and provide the field path in the applicable field in the automation wizard.

4) Click **OK** to return to the Automation Wizard

c) In the **Then** screen:

- i) Select ☐ **Update a specific task**
- ii) Click **specific** hyperlink in the rule

In the **Then** window:

1. Select the **Task Type**: 'Requested'
2. Enter the **Task Name**
3. Click the **Task Status checkbox**, select 'Received'
4. Click **OK** to return to the Automation Process Wizard

**NOTE:** The rule is updated according to your selections and is ready to process.

d) In the **New Automation Process** screen/**General** tab:

- i) Select **Category**: '360' from the dropdown menu
- ii) Enter **Name** of new automation process





iii) Click ☐ Enable this process

iv) Click

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



## 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. 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 the applicable Task
4. Select **Status: 'Requested'**

The screenshot shows the SoftPro interface with the following elements:

- Top Navigation Bar:** Includes tabs for ProForm, ProTrust, ProDesign, Pro1099, SPImage, SPAdmin, 360, and **Order** (highlighted with a red box and number 1).
- Quick Links:** Includes Register, Checklist Tasks, **Requested Tasks** (highlighted with a red box and number 2), Notes, My Screens, Order History, Documents, Attachments, Document History, Field Code Browser, Apply Template, Overlay Order, Rename Order, Submit, View Transactions, and 360.
- Order Management Console:** Shows the order number **Order 2020020173\*** and the **Requested Tasks** section.
- Requested Tasks Table:**

Status	Task	Category	Occurs	Assigned To
Requested	Policy Upload		Post-closing	Sharon Evans-Scott
Requested	<b>NC-CPL_Submit</b> (highlighted with a red box and number 3)		Pre-closing	Sharon Evans-Scott
- Task Details Form:**
  - Occurs:** Pre-closing (selected), Post-closing
  - Code:** [Empty]
  - Task:** NC-CPL\_Submit
  - Status:** **Requested** (highlighted with a red box and number 4)
  - Category:** [Empty]
  - Assigned to:** Sharon Evans-Scott
  - Requested:** Due: (None), Via: [Empty], Requested: 04/10/2020 07:37 AM, By: Sharon Evans-Scott
  - Fee:** Fee: [Empty], Line: [Empty], Contact: [Empty], Invoice: [Empty]

5. 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 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**

Status	Process	Context	Triggered By	Triggered On
Running	Submit-CPL-NC	(AgentNet-Demo-UT) NC...	Pratik Mavani	1/16/2020 2:37:00 PM
Completed	Submit-CPL-NC	(AgentNet-Demo-UT) Pol...	Pratik Mavani	1/14/2020 8:33:00 PM
Completed	Submit-CPL-NC	(AgentNet-Demo-UT) Pol...	Pratik Mavani	1/14/2020 8:31:00 PM
Completed	Submit-CPL-IL	(AgentNet-Demo-UT) Pol...	Pratik Mavani	1/14/2020 3:30:00 PM
Completed	Submit-CPL-UT	(AgentNet-Demo-UT) Pol...	Pratik Mavani	1/14/2020 3:25:00 PM
Completed	Submit-CPL-IL	(AgentNet-Demo-UT) Pol...	Pratik Mavani	1/14/2020 3:15:00 PM
Completed	Submit-CPL-IL	(AgentNet-Demo-UT) Pol...	Pratik Mavani	1/14/2020 3:04:00 PM

**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.

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Status	Description	Action/Resolution
<b>Server Path Error</b> <i>'No Active Client could be found'</i>	<ul style="list-style-type: none"> <li>System is pointing to the wrong active server</li> <li>Server location path is entered incorrectly</li> </ul>	Go to <b>SoftPro 360</b> tab in the <b>Select Server</b> window to update server information. <b>NOTE:</b> To verify the correct server information, go to the <b>360</b> tab from the main screen, click <b>About</b> tab.
<b>Pending Work Message</b> <i>System is unable to acquire lock on context order' is displayed in the Monitoring screen.</i>	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.
<b>Can't Access Automation</b> <i>'No Active Client could be found'</i>	SoftPro 360 username and password are incorrect.	Go to the <b>SoftPro 360</b> tab in the <b>Select Server</b> window to update SoftPro username and password.
<b>Credentials</b> <i>AgentNet User ID and/or Password to not match our records.</i>	AgentNet username and password are incorrect in the automation rule.	Go to the <b>Perform a 360 Action</b> rule in the automation to update the username and password.
<b>Approved Attorney ID</b> <i>Approved Attorney ID is a Required Field for State</i>	Property is located in AL, DE, DC, GA, IA, LA, MD, NC, OK, PA, SC, VA, WV or WI and Approved Attorney value is missing.	Go to <b>Perform a 360 Action</b> rule and provide a valid Office ID in the Approved Attorney ID field. If AA coverage is not needed, provide your office ID in this field.
<b>Update Task</b> <i>Error updating task. Task with name could not be found.</i>	Task name in Automation rule doesn't match required trigger task in file.	Go to <b>Required Tasks</b> screen to validate name of requested trigger task added to file. Update task name in automation rule.
<b>Field Code Error</b> <i>Incorrect Field Code or ProForm value is empty</i>	<ul style="list-style-type: none"> <li>Office ID, Account Number or Approved Attorney ID in automation rule is empty or contains incorrect value.</li> <li>File fields used in automation rule contain incorrect values.</li> </ul>	Go to the <b>Perform a 360 Action</b> rule in the Automation and check values entered in Office ID, Account Number, Approved Attorney ID fields. Check values in file fields if used in automation rule.
<i>No Loan details found. Loan amount and Loan Number are required.</i>	Loan Number is missing from file.	Enter Loan Number in file prior to requesting automation.
<b>Missing Document</b>	CPL Submit process was successful but the CPL document does not appear in Attachments.	CPL Accept process did not run successfully.