Job Aid: Use the View Order Search Details Window

The purpose of this document is to show you how to use the View Order Search Details window in StreamLine ASP.

Prior to selecting the Order Search tab, you must complete the steps to **Create a New File**, as this information will populate to the Order Search tab in StreamLine ASP.

NOTE: Only one AgentNet Search Product® can be inserted in a file.

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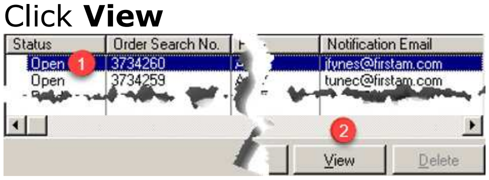
I. View Order Search Details

Once you receive the **Order Confirmation Email** from **AgentNet®**, access the **View Order Search Details** window.

1. Select the desired **Open Order Search Request** in the **Product Information** window
   NOTE: The **Order** must have a **Status** of **Open** to import.

2. Click **View**



NOTE: The **View Order Search Details** window opens, pre-populated with information for the submitted **Product Request**.

NOTE: Each time the **View Order Search Details** window is accessed **StreamLine ASP** retrieves the most current data from **AgentNet®** and updates the **Order Progress Details**, **Documents** and **Notes** browse tables.

II. View Order Search Comments

1. Select the desired **Task Name** in the **Order Progress Details** section

NOTE: If comments for the selected **Task Name** exist, the **Comments** button is enabled.

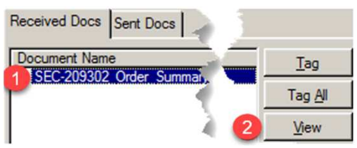
2. Click **Comments** to view the message

3. Click OK

III. View Received Documents

The **Received Docs** tab in the **Documents** section shows a list of documents returned from **AgentNet®** for the product ordered.

1. Select a document in the **Received Docs** tab of the **Documents** section
2. Click **View**



NOTE: The document displays in the **StreamLine Viewer**.

3. Click ☒ to close the **StreamLine Viewer**

IV. Save a Document

1. Select the desired document to save
2. Click Tag
3. Click Save to save the document to the **Documents** section for your **Order Search**

V. Import an AgentNet Search Product®

If the product ordered is the AgentNet Search Product (ASP), a document type of 'xml' is returned. This type of document contains the data necessary to import the AgentNet® values into your StreamLine ASP order, but cannot be viewed or saved.

1. Click AgentNet® in the **Worksheet** window
2. Enter your **AgentNet User Name** in the **AgentNet Login** dialog box
3. Enter your **Password**
4. Click OK

5. Click **Order Search** in the **Product Information** window
6. Select the desired **Open Order Search**

   NOTE: The **Order** must have a **Status** of **Open** to import.

7. Click **View**

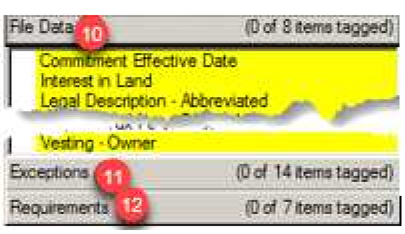
   NOTE: The **View Order Search Details** window opens.

8. Select the desired **xml Order** in the **Received Docs tab** window

   NOTE: Review the data in the **Review/Import AgentNet Data** window prior to importing into your order.

9. Click **Import**

10. Click **File Data (0 of 8 items tagged)** to display the list of items available for importing
11. Click **Exceptions (0 of 14 items tagged)** to display the list of **Exceptions** available for importing
12. Click **Requirements (0 of 7 items tagged)** to display the list of **Requirements** available for importing



NOTE: A yellow background indicates **File Data** in **StreamLine** and **AgentNet** do not match.

13. Click on any item to view the **AgentNet Value** in the **Preview Data** window

14. Click the **Exceptions** checkbox
15. Click the **Exceptions** ▼
16. Select the desired **Exception**
17. Click the **Requirements** checkbox
18. Click the **Requirements** ▼
19. Select the desired **Requirement**

20. Select the desired item you want to **Tag**
21. Click the **Tag** button to indicate items you want to import

NOTE: A green arrow displays next to the selected **Requirement** and/or **Exception**, indicating the item is tagged. When an item is tagged, the **Import** button is enabled.

22. Make revisions as necessary for the selected **Requirement** and/or **Exception** in the **AgentNet Value** section

23. Click Smart Tag to tag all items, if necessary

NOTE: The **SmartTag** button tags all highlighted **File Data** items that do not match, as well as all **Exceptions** and **Requirements**.

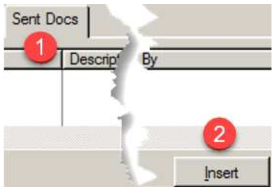
24. Click Import

NOTE: The **Import** button is available when any item is tagged. Using the **Import** button enables you to import the **AgentNet Values** into your file, overwriting **StreamLine File Data** and updating **Exceptions** and **Requirements** phrases to the selected document.

Click OK to confirm the import

VI. Add Documents to an Open Order Search

1. Click **Sent Docs**
2. Click **Insert**



3. Select the document you want to add to the **Order Search** in the **Select a Document** window
4. Click **Tag**
5. Click **OK**

NOTE: The documents display in the **Sent Docs** tab with a **Status** of **New**. You may select the new document to enable the command buttons for **Sent Docs**.

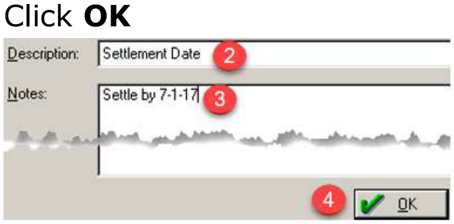
VII. Change Sent Documents with New Status

1. Click Change to display the **Select a Document** window, **Tag** the desired document, and make the desired change
2. Click Delete to remove the document from the **Documents** section
3. Click Tag for a document with a **New Status** to submit a document
4. Click Submit to submit the tagged document to **AgentNet®**

NOTE: The document **Status** changes to **Submitted**. **Submitted** documents cannot be changed, deleted, tagged, or submitted again.

VIII. Add Additional Notes to an Opened Order Search

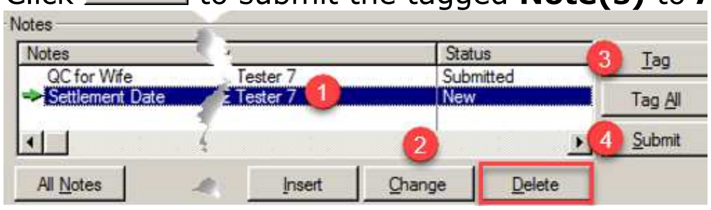
1. Click Insert
2. Enter the desired information into the **Description** field in the **Notes** window
3. Enter the desired information into the **Notes** field
4. Click **OK**



NOTE: The additional note displays in the **Notes** browse with a **Status** of **New**. Selecting the **New Note** enables the command buttons.

IX. Working With a New Note

1. Select the desired **New Note** to enable the command buttons
2. Click Change to review/edit the **Notes**
3. Click Tag to enable the **Submit** button with the desired **New Note** selected
4. Click Submit to submit the tagged **Note(s)** to **AgentNet®**



NOTE: The **Notes Status** changes to **Submitted**. **Submitted Notes** cannot be changed, deleted, tagged, or submitted again. If applicable, you may click Delete to remove a note.

X. View All Sent/Received Notes

1. Click All Notes

NOTE: The **Sent/Received Notes** window opens in read-only mode.

2. Click Close to close the **Sent/Received Notes** window

XI. Submit an Order Search Update Request

1. Click AgentNet® in the **Worksheet** window
2. Enter your **AgentNet User Name** in the **AgentNet Login** dialog box
3. Enter your **Password**
4. Click OK

5. Click Order Search in the **Product Information** window
6. Click View

NOTE: The **View Order Search Details** window opens.

7. Click Request Update in the **View Order Search Details** window

   NOTE: The **Request Update Form** window opens displaying the **Disclaimer.**

8. Enter the Update Request information into the **Instructions** field

   NOTE: If the Disclaimer contains an acceptance check box, you must click the check box prior to submitting the Update Request to AgentNet.

9. Click Submit

10. Click Close to close the **View Order Search Details** window

11. Click Close to close the **Product Information** window

   NOTE: Use View Update to display the **Order Update Details** window and view a list of previously submitted update requests.

XII. View Submitted Update Requests

1. Click View Update

   NOTE: The **View Order Info** button is enabled when the subject property is located in the State of Connecticut.

2. Click Close to close the **Order Update Details** window