# PropLogix

## PURPOSE: To demonstrate how to set up and use the PropLogix search integration. PropLogix allows customers to order municipal lien searches, association estoppels, payoff tracking (release tracking), and surveys from within ResWare.

NOTE: Before enabling this integration, please register for an account with PropLogix at [www.proplogix.com](file:///C:\Users\rebecca\Documents\Documentation\CompleteANDPublished\JobAids\www.proplogix.com). Then contact [support@adeptivesw.com](mailto:support@adeptivesw.com) to enable this integration in ResWare and provide the login email and password created with PropLogix. After completing the setup instructions in this job aid, PropLogix will need to have the following items provided to them to complete the integration setup:

##### Employee partner email and password

##### Five *DocumentTypeID*’s

##### ResWare website URL

Version information: Functionality available in 9.4 with single credential access. An enhancement in 9.7 includes the ability for multiple login credentials. Internal user access can then be mapped to credentials. Credentials are selected on the *Search/PropLogix* panel.

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### Create a PropLogix partner

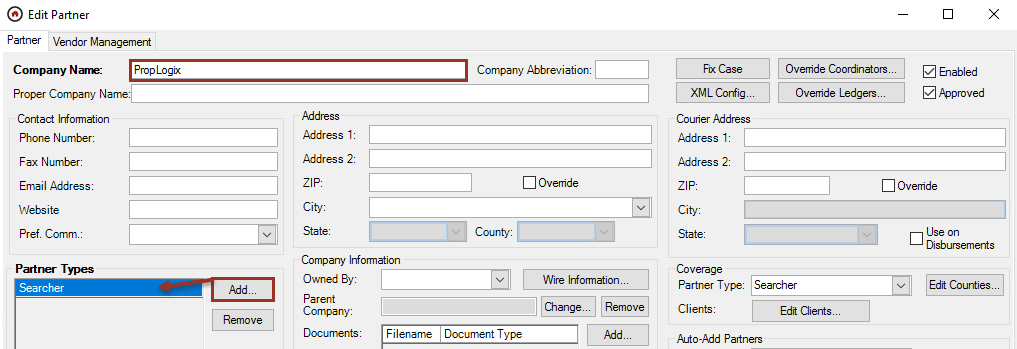
#### Admin/Partners

##### Click **New**.

##### Enter the partner’s information and set the *Partner Type* to **Searcher.**

##### Click **Save**.

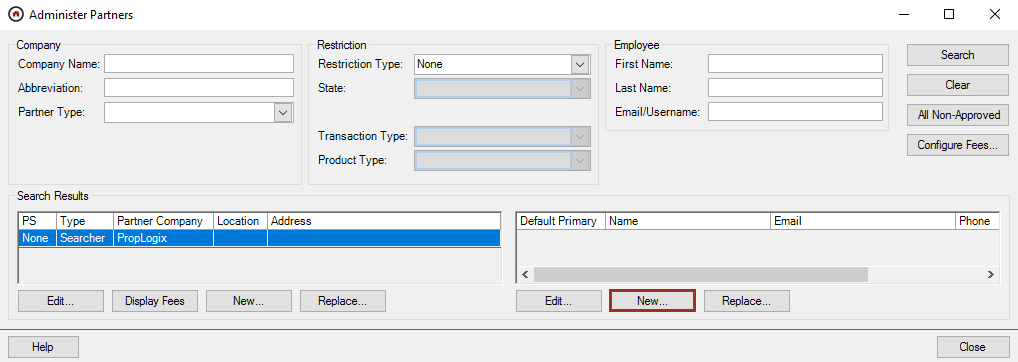
Note: This partner will need to be added to each file on which orders will be sent to PropLogix.



### Create a partner employee

#### Admin/Partners

##### Highlight the partner created above and click **New** in the partner employee area.



##### Enter a **First Name**.

##### Enter an **Email Address**.

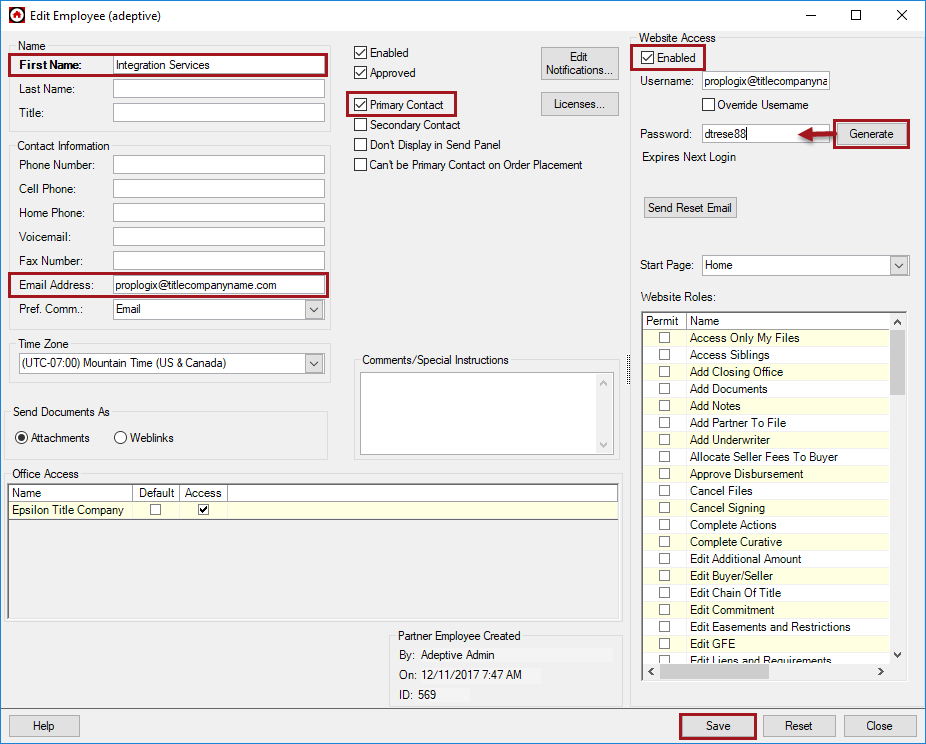
* Check **Primary Contact**, which will default this employee to the primary contact when the partner is added to the file.

##### Check **Enabled** in the *Website Access* area.

##### Click **Generate** to populate a **Password**.This will ensure company-specific password requirements are met. Write down this password to use in the validation step.

##### Click **Save**.

Note: The username and password for the employee will need to be provided to PropLogix to allow the documents to be returned to the file’s *Documents* panel.

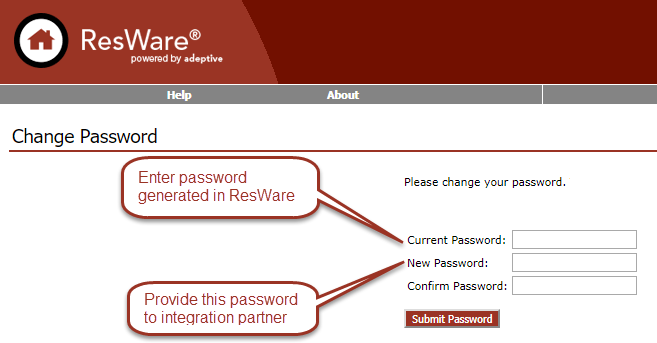


### Password validation

#### Website

##### After a password is set or reset for a partner employee, the employee is required to enter a new password the next time they access the website. To ensure this integration is set up properly, log into the company’s ResWare website with the username and password created in the prior step and create a new password. Provide this new password to PropLogix.

Note: It may be beneficial to set the expiration date of this password on the partner employee setup out for an extended period of time. Check with company-specific password security protocols to verify this will be acceptable or have a reminder in place to update this password as needed to ensure this integration’s service will not be interrupted.



### Set up the XML client information

#### Admin/General Setup/XML Clients

##### Highlight *PropLogix* and click **Edit**.

##### Check **Enabled** to enable the integration.

##### Enter the **Web Service URL** as [https://api.proplogix.com](https://api.proplogix.com/)

##### Click **Add** to enter the credentials provided by PropLogix.

##### Enter a *Display Name* that will be displayed when selecting this account on the *Search Panel*.

##### Enter the **Username** provided by PropLogix for this account.

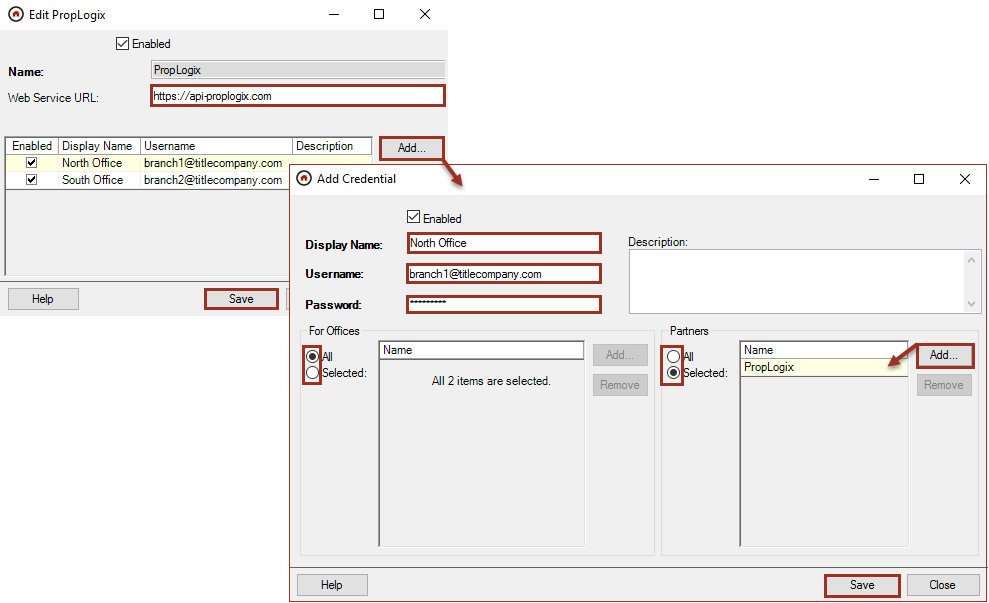
##### Enter the **Password** provided by PropLogix for this account.

##### In the *For Offices* area, if this account is for specific offices, check **Selected**, then click **Add** to add the office or offices where this account is available; otherwise leave as **All**.

##### In the *Partners* area, if this account is associated with a specific partner, check **Selected**, then click **Add** to add the partner or partners where this account is available; otherwise leave as **All**.

##### Click **Save**.

##### Repeat the above steps for each set of credentials provided by PropLogix.



### Internal user access

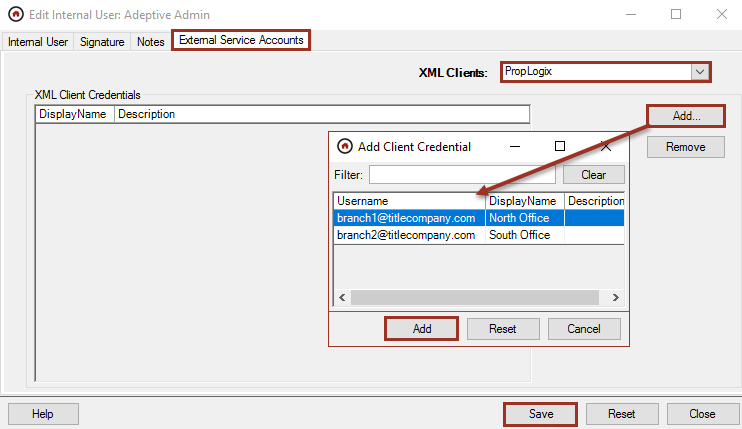
#### Admin/Internal User/External Service Accounts

Access to the PropLogix accounts must be assigned at the user level.

##### Select PropLogix in the *XML Clients* drop-down menu, if not already selected.

##### Click **Add**, then select the account or accounts as needed.

##### Click **Add**, then **Save**.



### Set up XML tab on products

#### Admin/Action Lists/Product Types

##### **Edit** each product on which enabling PropLogix functionality is needed.

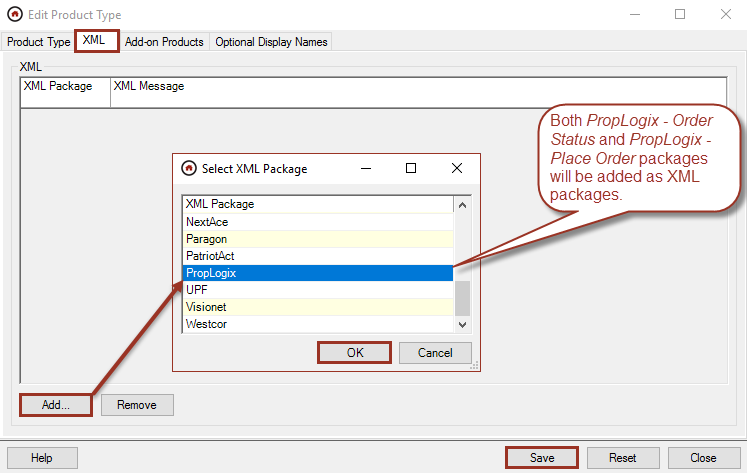
##### Click **XML** tab.

##### Click **Add** and select *PropLogix*.

##### Click **OK**.

##### Click **Save**.

##### Click **Close**.



### Set up document types

#### Admin/Documents and Templates/Document Types

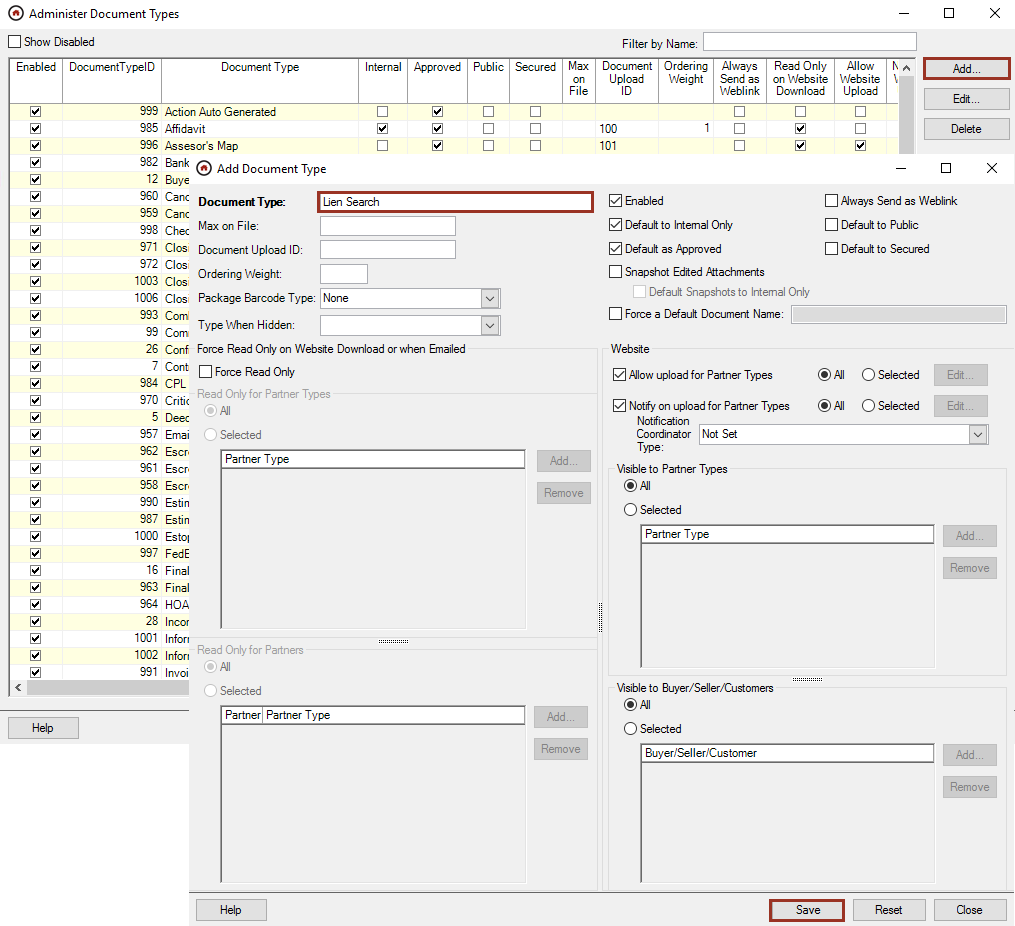
Five document types (*Invoice*, *Lien Search*, *Estoppel*, *Payoff Tracking*, and *Survey*) will need to already exist or be created in ResWare to allow PropLogix to return the different ordered products along with an accompanying invoice as .pdf documents on the file.

Add new document types

##### **Add** to create a new *Document Type* as needed for each PropLogix product along with one for an invoice.

##### Enter **Name**.

##### Click **Save**.

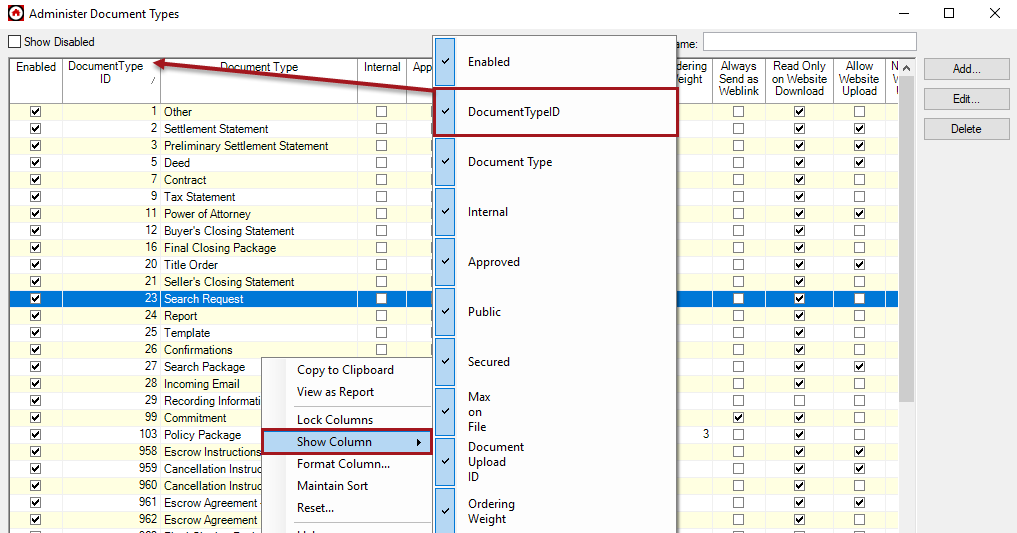


The *DocumentTypeID*’s for each document need to be provided to PropLogix to ensure the correct mapping.

##### Right click in grid.

##### Select **Show Column.**

##### Select **DocumentTypeID.**



### Set-up an action and affect to automate order placement with PropLogix

This only needs to be done if ordering searches with PropLogix should be done based on an action being completed. If users are going to manually send orders to PropLogix, skip this step.

Note: An order sent via an action will only request a lien search product with a default set of options. If other PropLogix products are needed, a user will need to order manually from the *Search Data/PropLogix* panel.

#### Admin/Action Lists/Action Groups

##### Highlight the action group that has the action that should send the search and click **Edit Actions**.

##### Highlight the action that should be used to send the request and click **Edit Affects**.

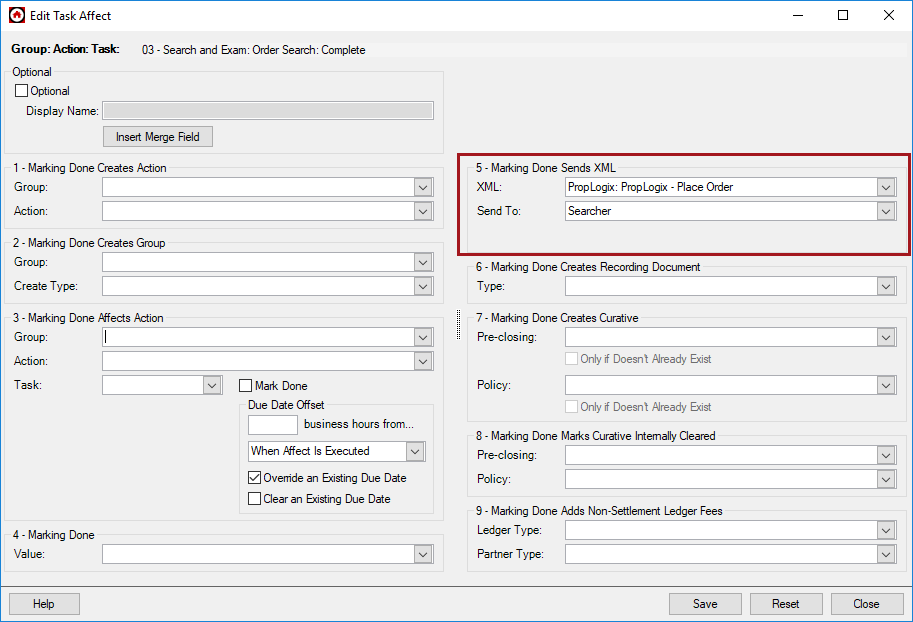
##### In either the *Start Task Marked Done Affects* or *Complete Task Marked Done Affects* section, click **Add**.

##### Select the following in *5 – Marking Done Sends XML*.

##### **XML**: *PropLogix: PropLogix – Place Order*.

##### **Send To**: *Searcher*.

##### Click **Save**.



### On a file – automatic order placement

#### File/Actions tab

The PropLogix partner must be on the file in order to send search requests. The file must have an **Estimated Settlement Date** entered on the *General* panel.

##### Highlight the action being used to send the search request to PropLogix and click either **Mark Started** or **Mark Completed**, depending on where the affect was set.

##### A lien search order will be sent to PropLogix with the following options:

##### *Property Appraiser*

##### *Property Taxes*

##### *Tangible Taxes*

##### *Open Code Cases*

##### *Closed Code Cases*

##### *Open and Expired Permits*

##### *Closed Permits*

##### *Utilities*

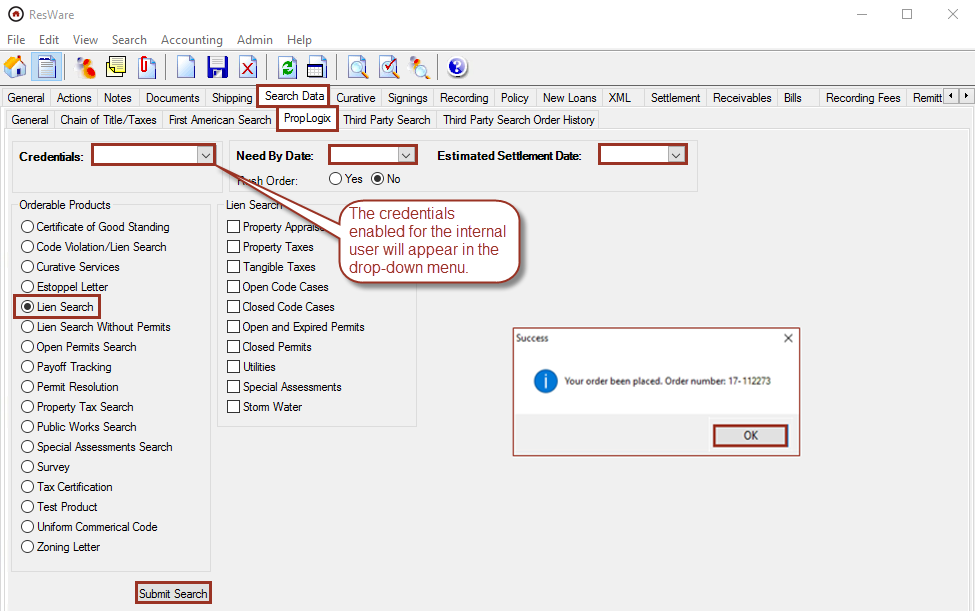
##### *Special Assessments*

The search document will be returned from PropLogix and added to the *Documents* tab of the file when complete as on of the five document types PropLogix requires (*Invoice, Lien Search, Estoppel, Payoff Tracking, or Survey*).

### On a file – manual order placement

#### File/Search Data/PropLogix

The PropLogix partner must be on the file in order to send search requests.



##### Select an option in the *Orderable Products* column.

##### Enter a **Need by Date**.

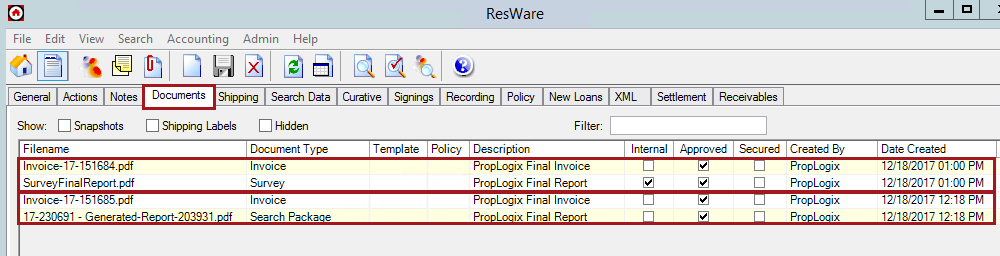
##### Enter an **Estimated Settlement Date**.

##### Select the *Lien Search* options. These options vary based on the type of product selected.

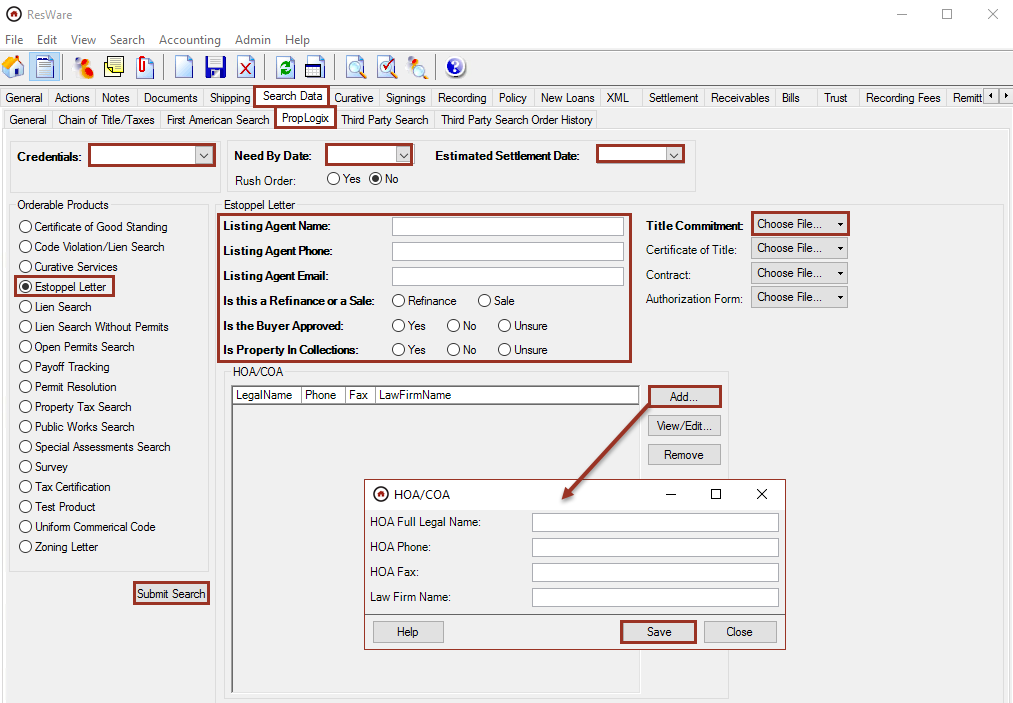
##### Click **Search**. This will send the request to PropLogix.

##### Click **OK** on the popup showing the order was placed.

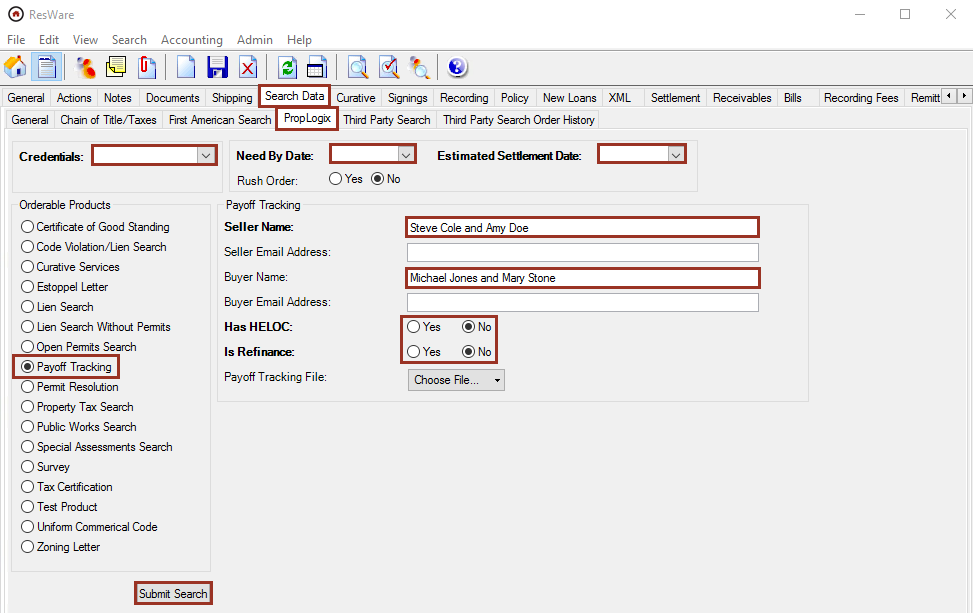
PropLogix will return the ordered product with an accompanying invoice on the *Documents* panel. Action triggers may be set up based on documents of these types being added to the file.



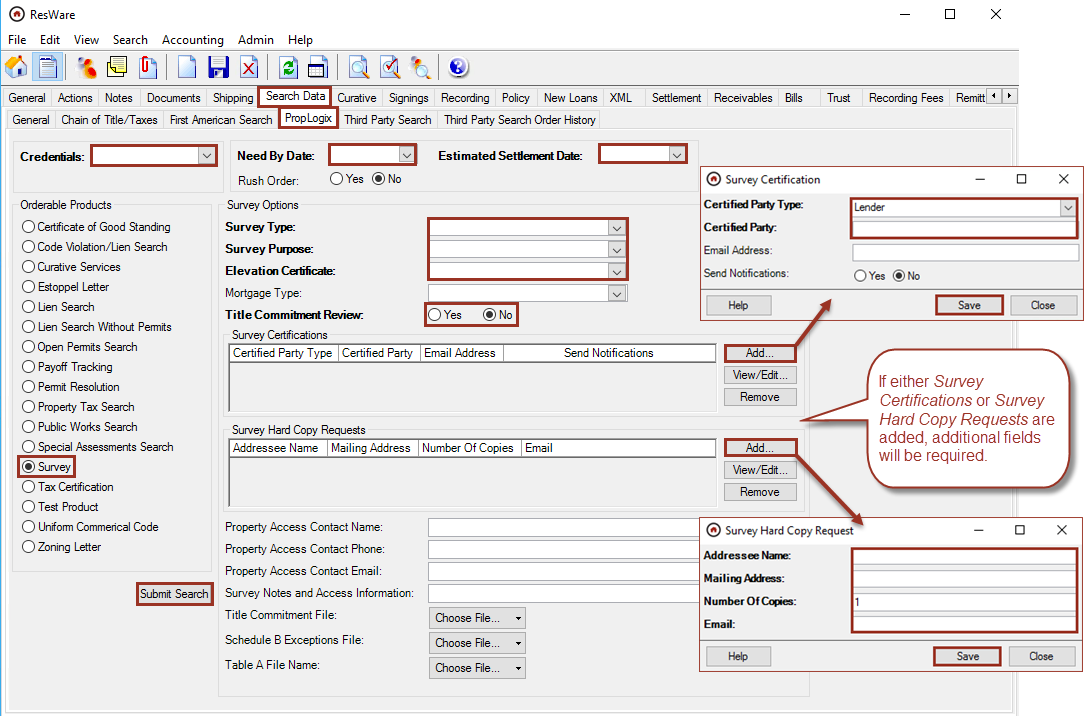
If an estoppel letter is being ordered, the user will be presented with additional fields; fields in bold are required. The **Listing Agent** fields will be populated from the *Listing Agent* partner on the file, if it exists. *Title Commitment*, *Certificate of Title*, *Contract*, or *Authorization Form* documents can be added from the file or attached from the user’s computer by using the **Choose File**drop down menu.



If payoff tracking (release tracking) is being ordered, the user will be presented with additional fields; fields in bold are required. The **Seller Name** and **Buyer Name** will be populated from the buyer/seller partners on the file, if they exist.



If a survey is being ordered, the user will be presented with additional fields; fields in bold are required. **Survey Type**, **Survey Purpose**, and **Elevation Certificate** each have dropdown selections available. If either a *Survey Certification* or *Survey Hard Copy Requests* are added, additional fields will be required as shown.



### On the file - XML activity

#### File/XML

This panel shows activity from the initial order placement to the documents being returned from PropLogix for the services ordered.

