ResWare/A.S.K. Search Integration User Guide

PURPOSE: To demonstrate how to set up and use the A.S.K. Services search integration.   A.S.K. allows users to order searches from ResWare for title abstracts, document recordings, criminal and civil court record searches, UCC/fixture filing and tax lien searches, and corporate and resident agent services.

> **Note: Before enabling this integration, register with A.S.K. Services, Inc. by calling (888) 416-1313. They will provide the information needed to complete the setup including the office ID, client ID, and URL to access services with a username and password. A.S.K. Services will need to have the ResWare web domain, the *DocumentTypeID*s, *LienTypeIDs,* and *EasementTypeIDs* for each document they provide to the file, along with the username and password of the partner employee created in this job aid. After completing the setup contained in this job aid, contact Resware Support support@resware.qualia.com to update the configuration files.**
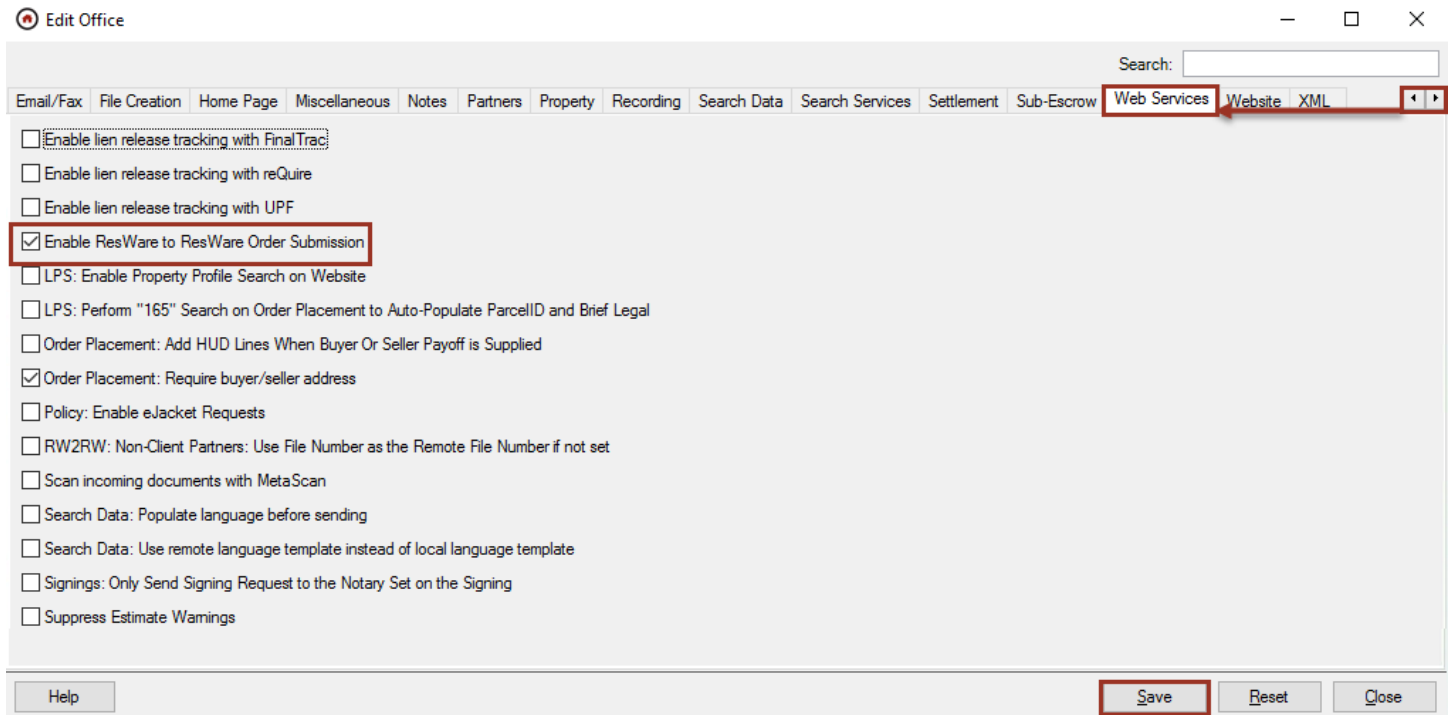
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Enable office option

> Admin/General Setup/Offices

▪ *Highlight the office using this integration and click Edit.*

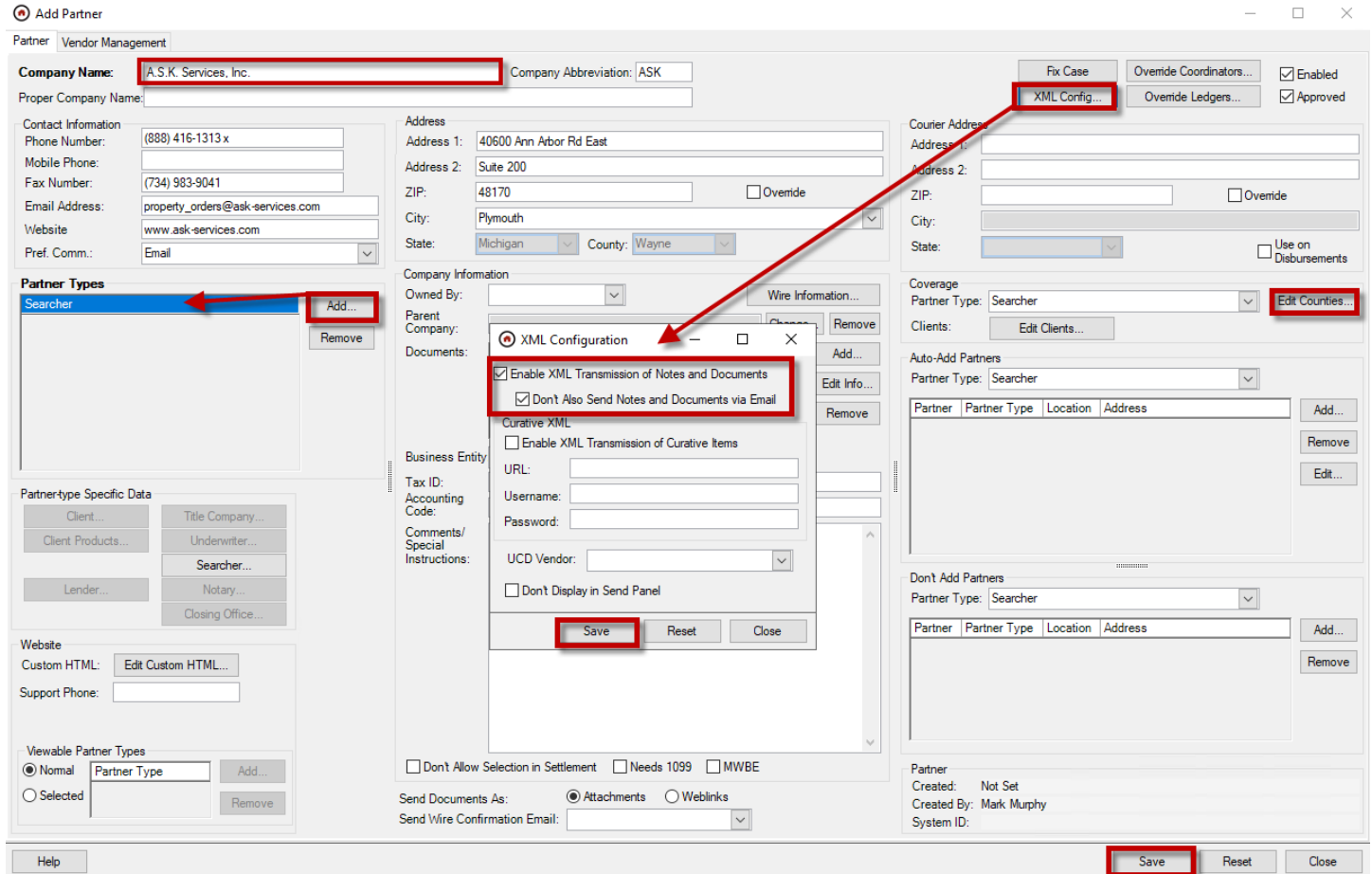▪ *Select the Web Services tab and enable the Enable ResWare to ResWare Order Submission office role.*

Create an A.S.K. partner

> Admin/Partners

▪ *Click New.*

▪ *Enter a Company Name, such as A.S.K Services, Inc.*

▪ *Enter the partner's information and set the Partner Type to Searcher.*

   o *Set the email address to property_orders@ask-services.com*

▪ *Click Edit Counties and enable the partner for the states and counties where the search integration will be used.*

- *Click XML Config and select Enable XML Transmission of Notes and Documents and Don't Also Send Notes and Documents via Email.*

- *Click Save.*

- *Click Save.*

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.*

  o *Set the email address to property_orders@ask-services.com*

- *Enable as Primary Contact.*

- *Check Enabled in the Website Access area which allows the web services to be utilized.*

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

- *Enable the following Website Roles:*

  o *Web Services: Access All Files for Resware-to-Resware Services*

    ▪ NOTE: This role triggers an alert, you will need to click Yes to proceed

    ▪
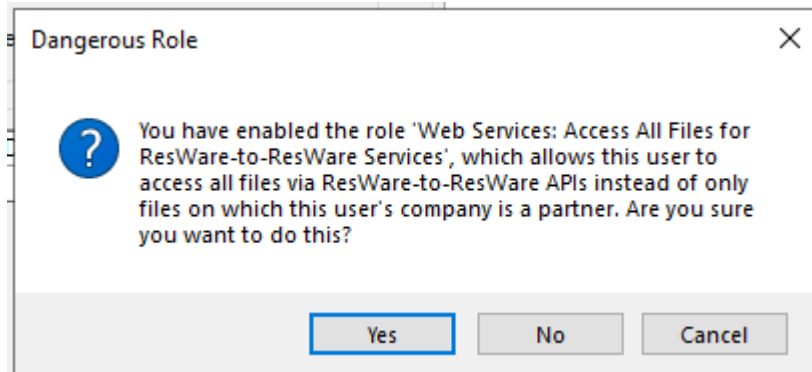
  o *Web Services: Add Documents*

- o *Web Services: Add Notes*

- o *Web Services: Get Documents*

- o *Web Services: Get Notes*

- o *Web Services: Order Placement*

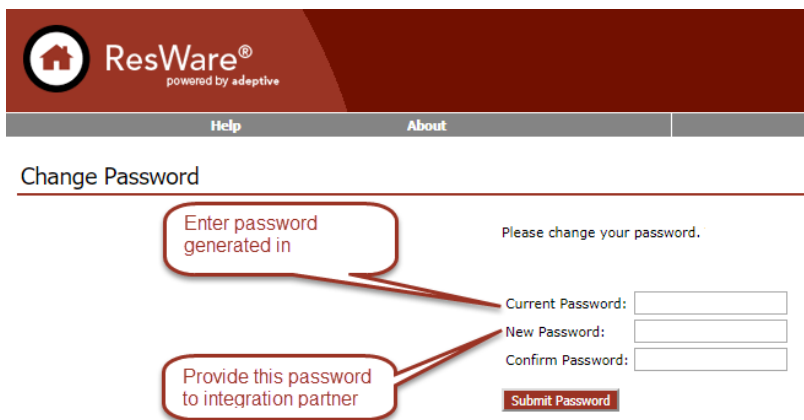- o *Web Services: Search Files*

- ▪ *Click Save.*

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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 A.S.K. Services.*

Note: It may be beneficial to set the expiration date of this password out for an extended period of time on the partner employee setup. 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.

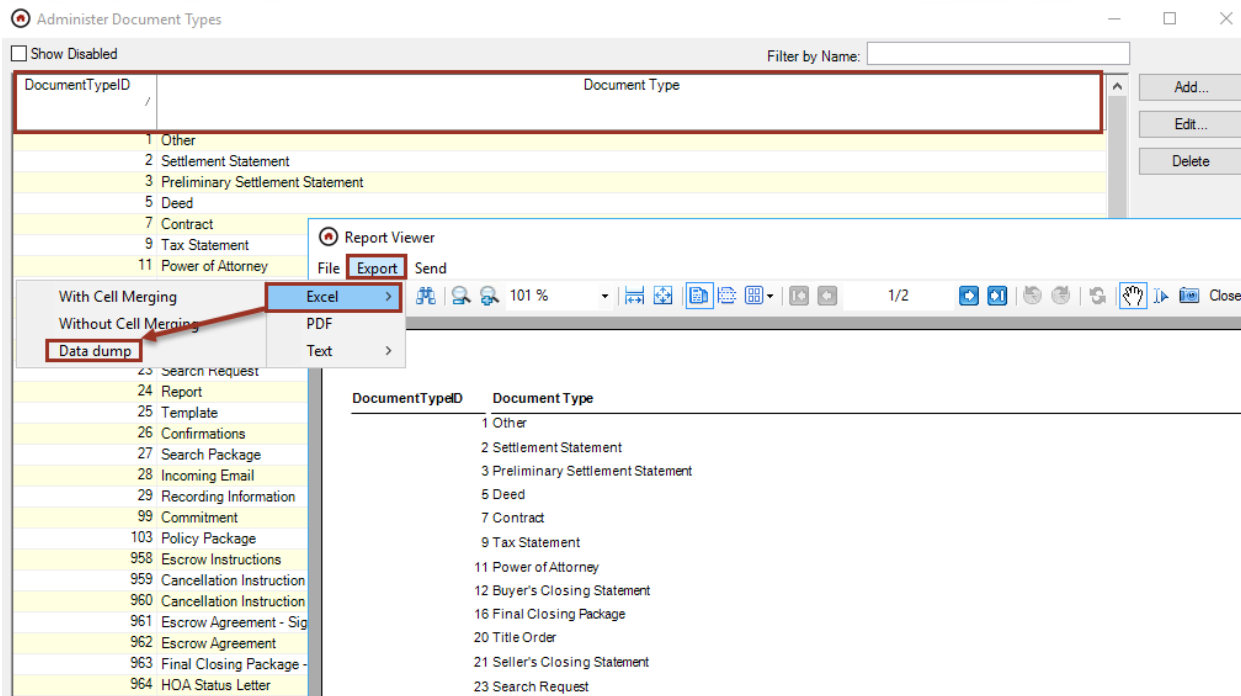Note: Provide the **Username** and **Password** to A.S.K. Services.

ResWare ID reports

A.S.K. Services needs IDs to return documents and lien information on files. The following steps will generate reports to easily provide this information.

Admin/Document and Templates/Document Types

▪ *Verify the DocumentTypeID column is visible. If not, right click in the grid, select Show Column and add DocumentTypeID.*

▪ *Right click in the grid and select View as Report.*

▪ *Once the report opens, click Export in the Report Viewer taskbar.*

▪ *Select Excel, then Data dump to generate an excel spreadsheet that can be customized to return only documents directly related to integration needs and allow A.S.K. Services to import the report.*

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- *Repeat these steps to generate reports for EasementTypeIDs at Admin/Search Data/Easement & Restriction Types and LienTypeIDs at Admin/Search Data/Lien & Requirement Types. Provide these reports to A.S.K. Services to map the information they send back to files.*

Create a ResWare to ResWare partner mapping

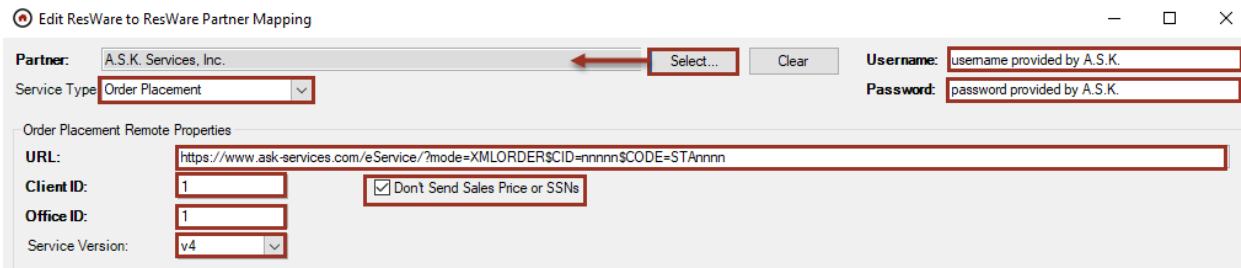Admin/Partner-Related/ResWare to ResWare Partner Mappings

- *Click Add.*

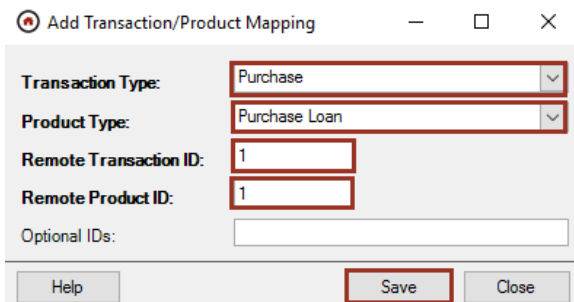
- *Click Search and select the partner created above.*

- *Enter the Username and Password as provided by A.S.K. Services.*

- *Verify the Service Type is set to Order Placement in the drop-down.*

  - o *Enter the URL as provided by A.S.K. Services.*

- ▪ *(This is a sample URL where nnnnn will be replaced by customer-specific numbers*

    - ▪ *https://www.ask-services.com/eService/?mode=XMLORDER$CID=nnnnn$CODE=STAnnnnn).*

- o *Enter the Client ID provided by A.S.K. Services.*

- o *Enter the Office ID provided by A.S.K. Services.*
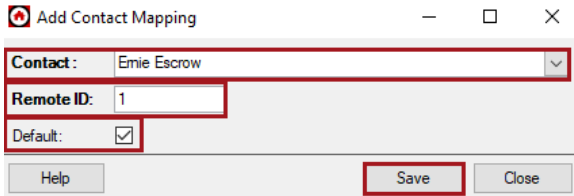
- o *Select V4 as the Service Version.*

- o *Click Add in the Transaction/Product Type Mapping area.*

- o *Select a Transaction Type from the drop-down.*

- o *Select a Product Type from the drop-down.*

- o *Enter a 1 as the Remote Transaction ID for the transaction being added.*

- o *Enter a 1 as the Remote Product ID for the product being added.*

- o *Click Save.*

- o *Repeat above steps for each transaction/product type that searches will be ordered through this integration.*
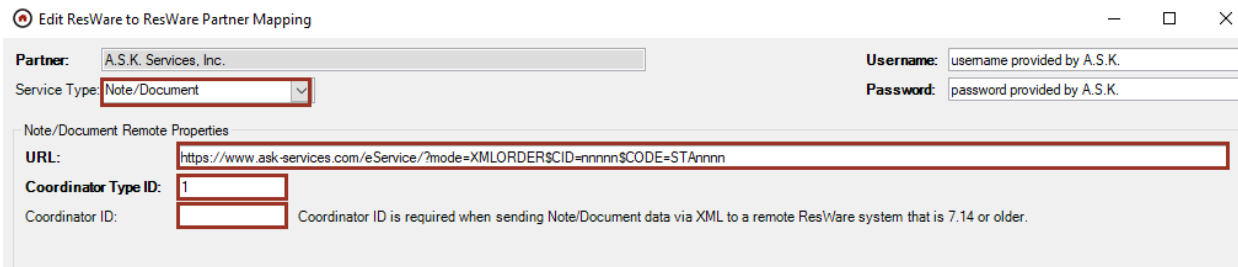

- o *Click Add in the Primary Contact Mapping area.*

- o *Select a Contact from drop-down; it does not matter which one is chosen.*

- o *Enter a 1 as the Remote ID.*

- o *Click the Default checkbox.*

- o *Click Save.*

- ▪ *Change the Service Type that is set in the drop-down to Note/Document.*

  - o *Enter the same URL from the prior step as provided by A.S.K. Services.*

  - o *Enter 1 as the CoordinatorTypeID.*

- o *Click Add in the Document Type Mapping area.*

- o *Select the Search Request Document Type from drop-down.*

- o *Enter 1 as the Remote ID.*

- o *Click Save.*

- o *Repeat the above steps for each document type used for this integration based on the services provided.*

- ▪

Set up the XML tab on products

Admin/Action Lists/Product Types

▪ *Edit each product where A.S.K. Services functionality is needed.*

▪ *Click the XML tab. If the ResWare XML package already exists on the product, skip to the next product type.*

▪ *Click Add and select ResWare from the drop-down.*

▪ *Click OK.*

▪ *Click Save.*

▪ *Click Close.*
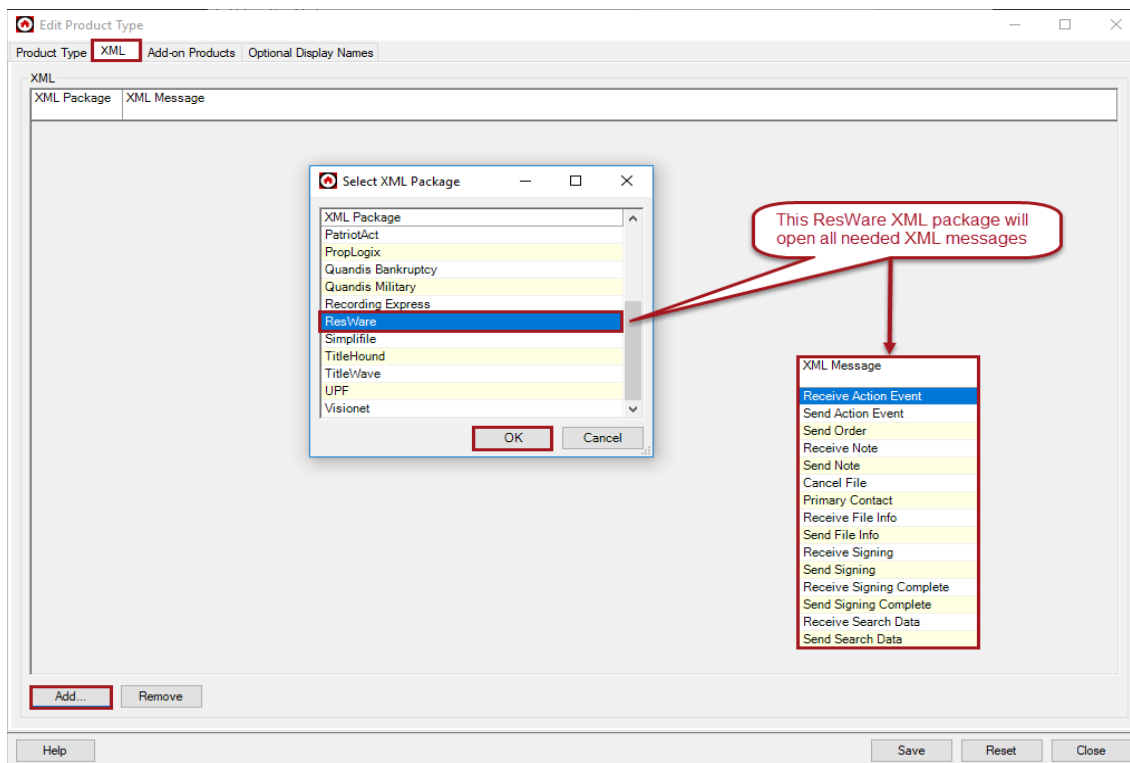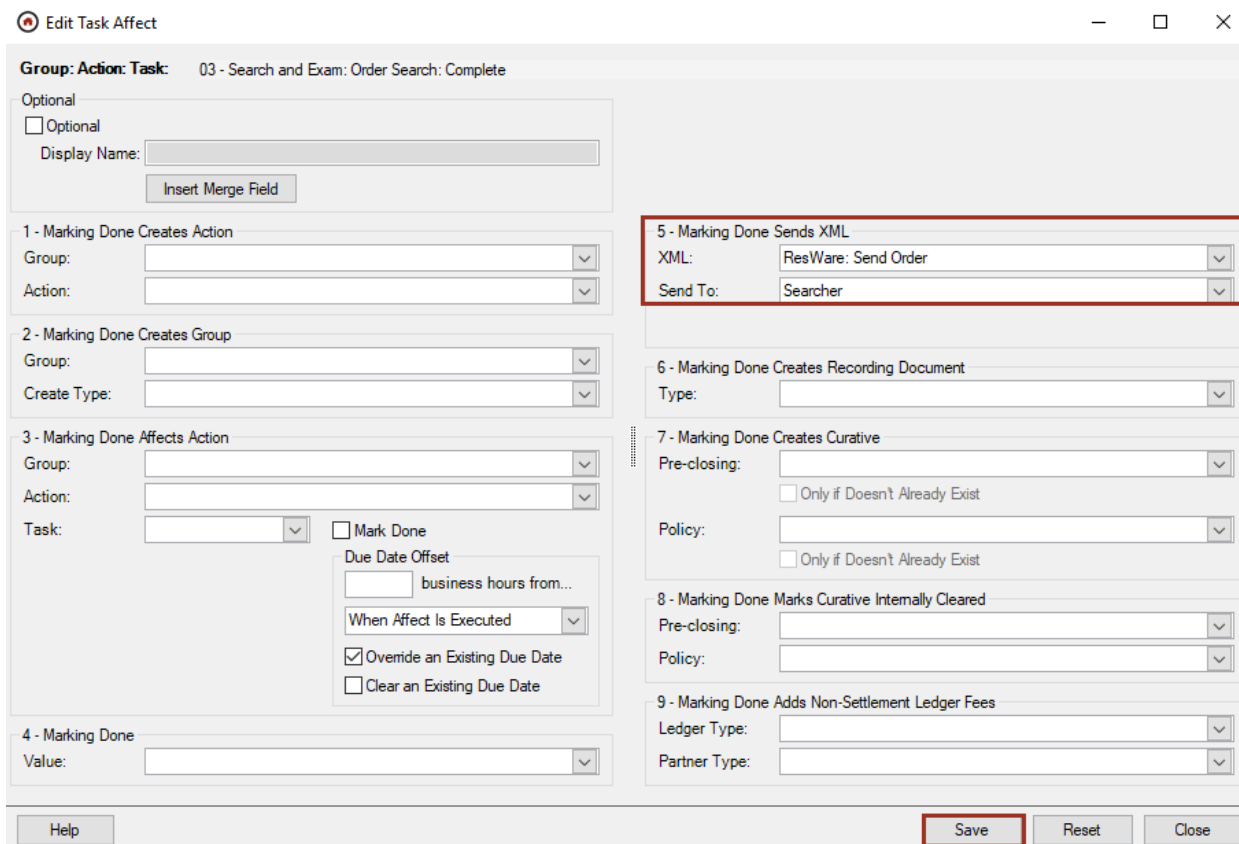
Set up an action and affect to automate order placement with A.S.K. Services

Admin/Action Lists/Action Groups

▪ *Highlight the action group that has the action that should send the search order request 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:*

    o *Select ResWare: Send Order from the XML drop-down.*

    o *Select the Searcher partner type from the Send To: drop-down.*

- *Click Save.*

- *Note: For further information on adding to the action workflow, see the additional job aids available on the user group website.*
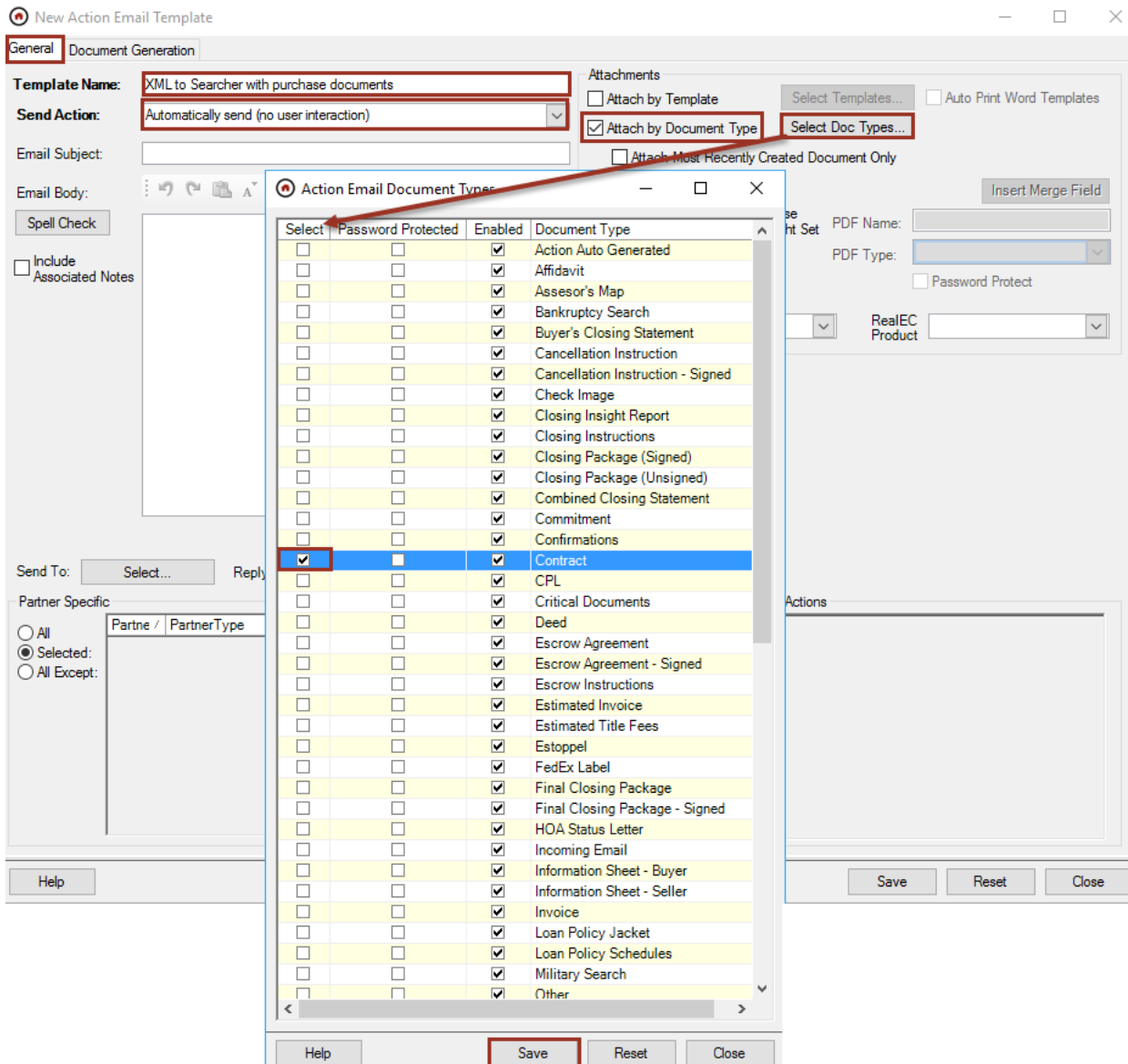
Set up an action to send documents

Documents can be sent to A.S.K. Services at any time using the *File/Note* panel. The following steps will automate sending a document(s) that is routinely sent. In this example, the action created will send the purchase contract document type on completion of the action.

Admin/Action Lists/Email Templates

- *Click New and enter a Template Name like XML to Searcher with purchase documents.*

  - o *Select Automatically send (no user interaction) in the Send Action drop-down.*

  - o *Check Attach by Document Type.*

  - o *Click Select Doc Types and select the documents to send such as Contract.*

  - o *Click Save.*

  - o *Check Attach Most Recently Created Document Only to ensure that the latest version of the document types on a file are being sent.*

  - o *In the Partner Specific area, check Selected and click Add to add the A.S.K. Services partner.*

o *Click on Select to open the Send To panel and select the Notary partner type.*

o ***Click Save.***
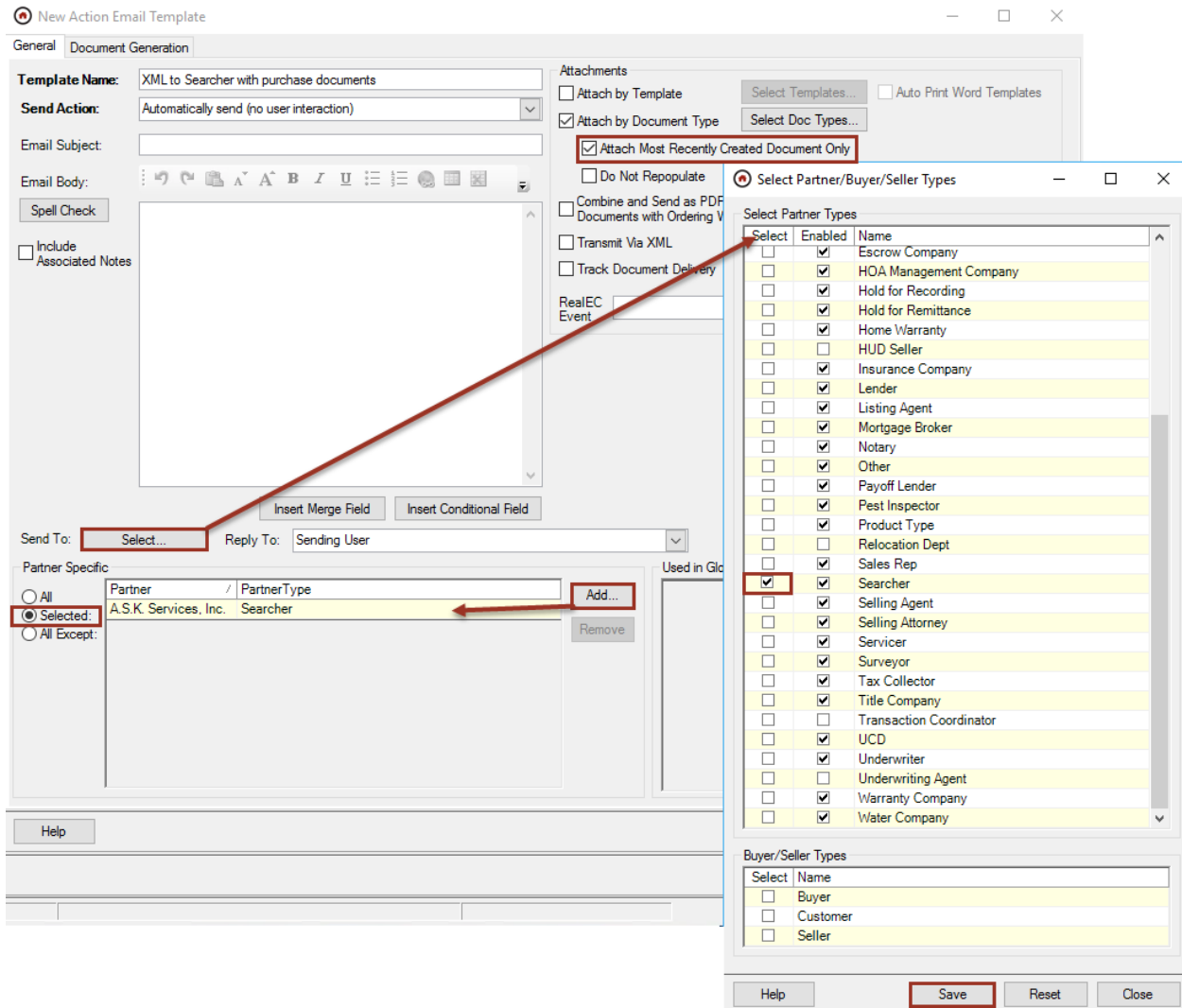
Setup for Email Templates

o If setting up using email templates, please include the following on specific requests for either NEW orders or UPDATE Orders accordingly.

o For both NEW and Update orders ensure that the Transmit Via XML box is selected

o New Orders

▪ *In the Email Subject section, enter the following for New Orders:*

New Order File Number [RW|GetFileNumber_1|RW

▪ *In the Email Body section, enter the following for New Orders:*

CLIENT_ID: <mark>nnnnnn</mark>

FILENUMBER: [RW|GetFileNumber_1|RW]
[RW|GetFileClientNumber_1|RW]

PRODUCT_ID: [RW|GetProductTypeDisplayName_1|RW]

PURPOSE_ID: [RW|GetProductType_1|RW]

EXAM: YES

BUYERNAME: [RW|GetBuyerSellerNames_Buyer_1|RW]

SELLERNAME: [RW|GetBuyerSellerNames_Seller_1|RW]

ADDRESS: [RW|GetPropertyAddress_1|RW]

COUNTY: [RW|GetPropertyCounty_1|RW]

STATE: [RW|GetPropertyState_1|RW]

CITY: [RW|GetPropertyCity_1|RW]

LEGAL: [RW|GetPropertyLegalDescription_1|RW]

LEGAL_NOTES: [RW|GetPropertiesShortLegal_1|RW]

NOTES: [RW|GetNoteNewOrder_1|RW]

ZIP: [RW|GetPropertyZip_1|RW]

PARCEL_IDS: [RW|GetPropertyParcelIDsAll_1|RW]

LOAN AMOUNT: [RW|GetLoanAmount_1|RW]

PURCHASE PRICE: [RW|GetSalesPrice_1|RW]

LENDER: [RW|GetPartnerName_Lender_1|RW]
END:

- o UPDATE Orders:

  - ▪ *In the Email Subject section, enter the following for Update Orders:*

    UPDATE Order File Number [RW|GetFileNumber_1|RW]

  - ▪ *In the Email Body section, enter the following for Update Orders:*
    CLIENT_ID: <mark>nnnnnn</mark>
    FILENUMBER: [RW|GetFileNumber_1|RW]
    PRODUCT_ID: [RW|GetProductTypeDisplayName_1|RW]
    PURPOSE_ID: [RW|GetProductType_1|RW]

EXAM: NO
BUYERNAME: [RW|GetBuyerSellerNames_Buyer_1|RW]
SELLERNAME: [RW|GetBuyerSellerNames_Seller_1|RW]
ADDRESS: [RW|GetPropertyAddressFull_1|RW]
COUNTY: [RW|GetPropertyCounty_1|RW]
STATE: [RW|GetPropertyState_1|RW]
CITY: [RW|GetPropertyCity_1|RW]
LEGAL: [RW|GetPropertyLegalDescription_1|RW]
LEGAL_NOTES: [RW|GetPropertiesShortLegal_1|RW]
NOTES: [RW|GetNoteNewOrder_1|RW]
ZIP: [RW|GetPropertyZip_1|RW]
PARCEL_IDS: [RW|GetPropertyParcelIDsAll_1|RW]
LOAN AMOUNT: [RW|GetLoanAmount_1|RW]
PURCHASE PRICE: [RW|GetSalesPrice_1|RW]
LENDER: [RW|GetPartnerName_Lender_1|RW]
END:

Admin/Action Lists/Action Groups

- *Highlight the group where the signing and/or closing actions exist.*

- *Click Edit Actions.*

- *Click New Global Action and enter a Name like A.S.K.: Request Search w/purchase contract.*

  - o *Click Add in the Completing Requires Documents area and select the document(s) needed for the email template created above.*

    - ▪ *Note: Adding documents as required to the action will prevent the action from sending the XML unless the documents are on the file.*

  - o *Click Add.*

  - o *Click Add in the Completing Email Templates area and select the email template created above.*

  - o *Click Add.*

  - o *Click Save.*
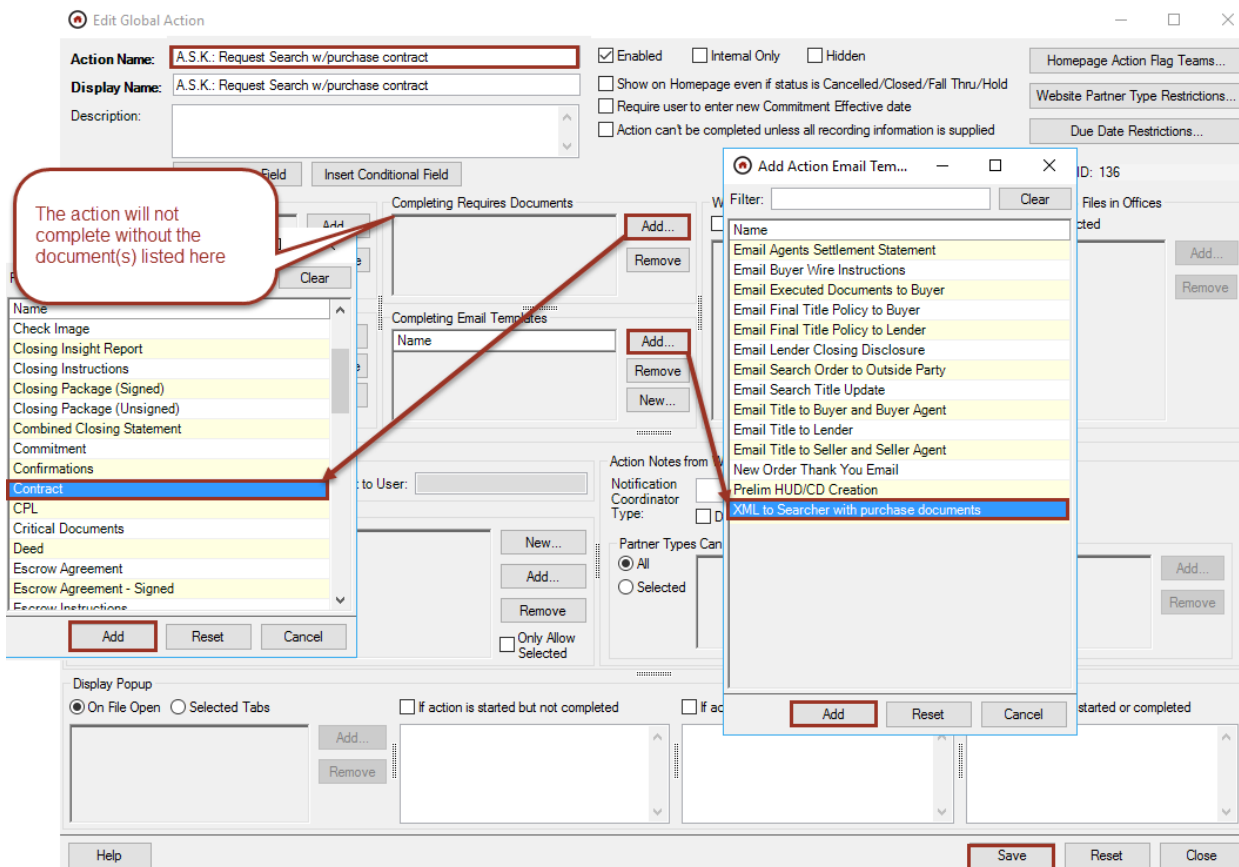
- *Check Dynamic.*

- *Select a Coordinator in the Start Task area (whomever normally deals with searches).*

- *Select Auto-start when Added to File.*

- *Select a Coordinator in the Complete Task area (whomever normally deals with searches).*

▪ ***Click Selected in the Partner Specific area, then click Add to add the A.S.K. Services partner.***
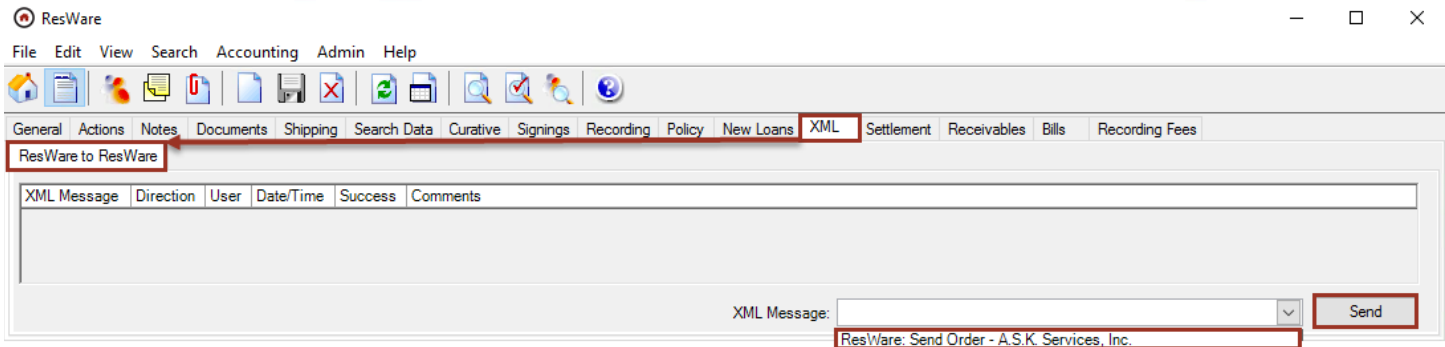
▪ ***Click Save.***

On a file – manual order placement

File/XML/ResWare to ResWare

▪ ***The A.S.K. Services partner must be on the file in order to send requests.***

- *Select ResWare: Send Order – A.S.K. Services, Inc. from the XML Message drop-down to order a search request.*

- *Click Send.*

- *A.S.K. Services will return a note to the Note panel, documents to the Documents panel, and update the information on the Search Data panel of the file. If desired, action triggers may be set up based on the document types being added to the file.*

On a file – automatic order placement

File/Actions tab

- *The A.S.K. Services partner must be on the file in order to send order requests.*

- *Highlight the action being used to send the search request to A.S.K. Services and click either Mark Started or Mark Completed, depending on where the affect was set.*
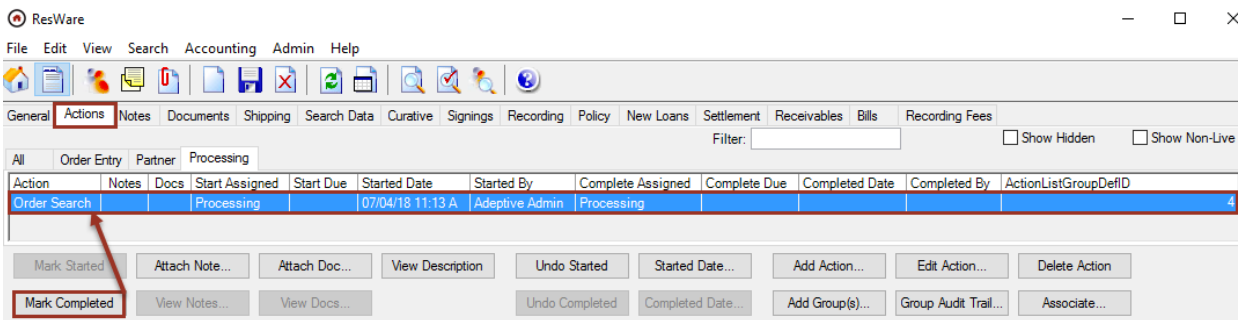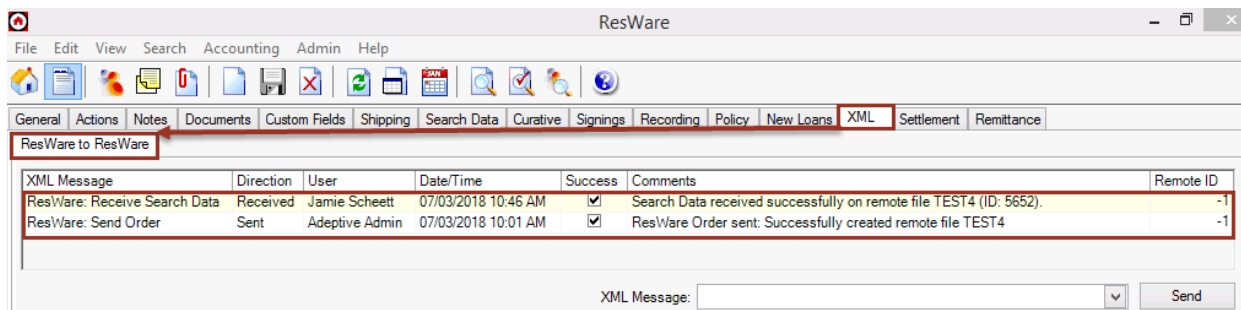

On a file - XML activity

File/XML/ResWare to ResWare

- *This panel shows activity from the initial order placement to the search data being returned from A.S.K. Services via manual order or from an action.*
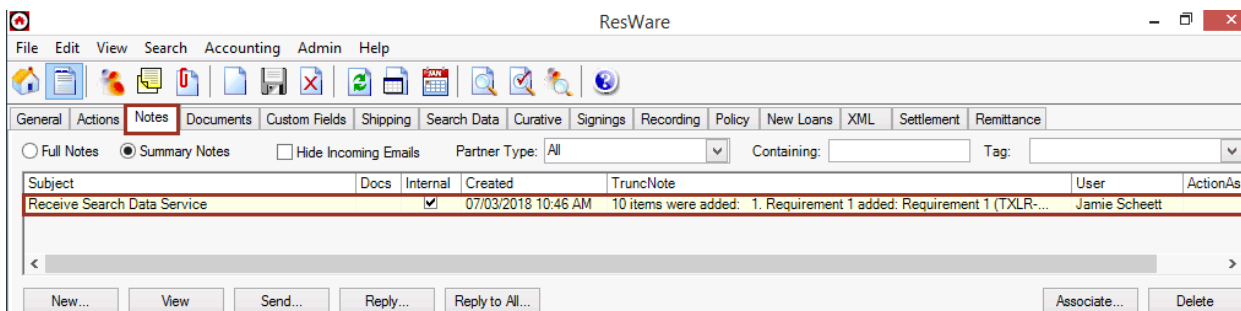
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On a file - Notes

File/Notes

- *This panel shows the note returned from A.S.K. Services which includes a detailed list of any search data added, updated or not updated on the Search Data panel.*

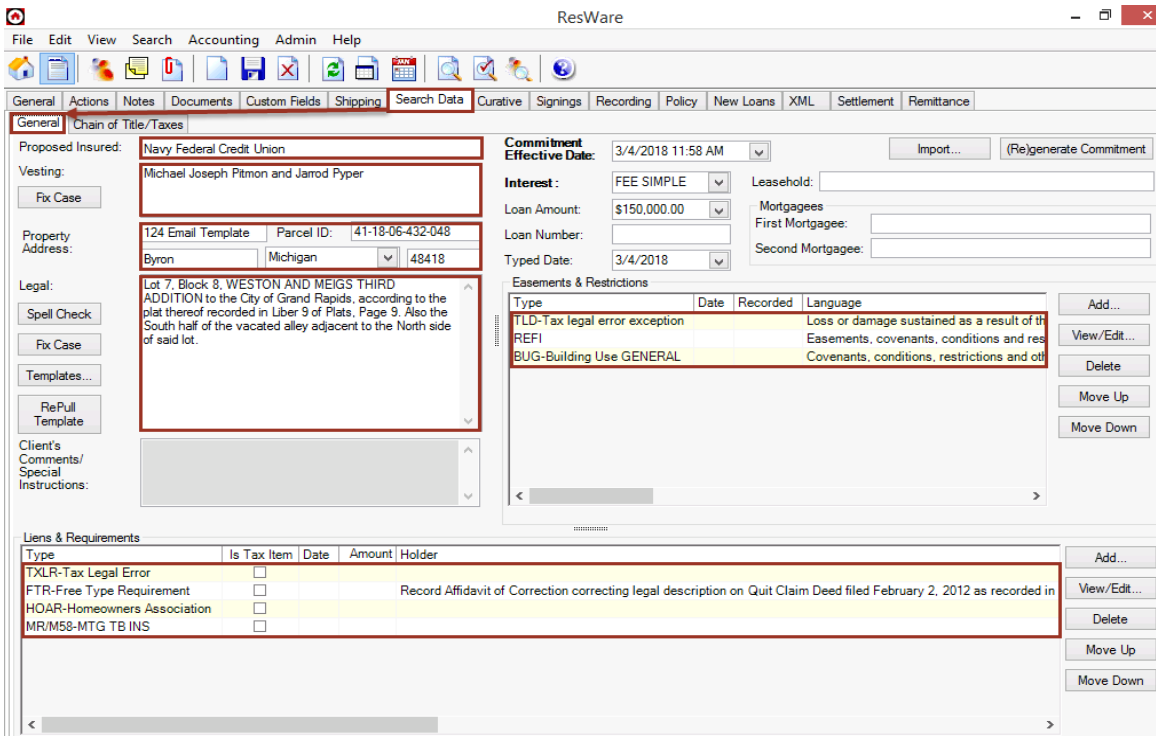## On a file – Documents

File/Documents

- *This panel shows the documents received from A.S.K. Services for the services requested.*
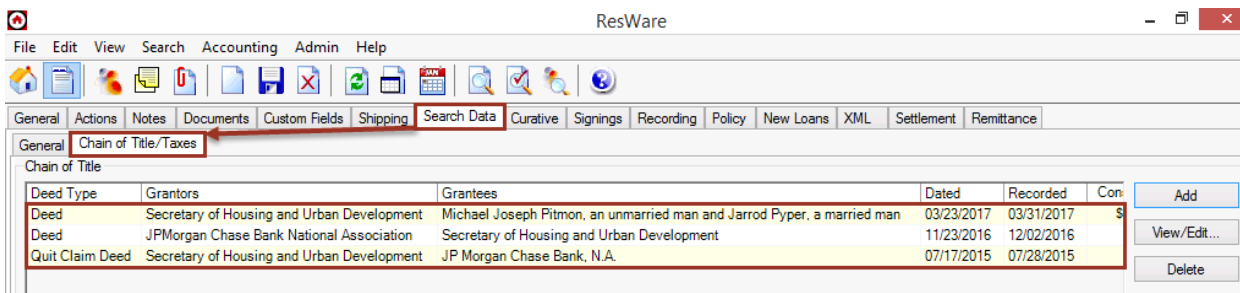
On a file – Search Data

File/Search Data

- *A.S.K. will populate search information on this panel and add Easements & Restrictions, Liens & Requirements, and Chain of Title data.*

Adeptive Support:

Once your setup is finished you may need to reach out to Adeptive Support to ensure that communication can flow by having the bindings updated in your database. They can be reached at support@resware.qualia.com.

Below is a sample of what script support may use to update these bindings. It is important that Support execute review and execute any script related to bindings as this could change.

BEGIN TRAN UPDATE dbo.ResWare2ResWareMapping SET BindingSendOrder = 'ResWareBasic_IOrderPlacementService', BindingSendSigning = 'ResWareBasic_IReceiveSigningService', BindingSendNote = 'ResWareBasic_IReceiveNoteService', BindingURLSendActionEvent = 'ResWareBasic_IReceiveActionEventService', BindingSendSigningComplete = 'ResWareBasic_IReceiveSigningCompleteService', BindingSendFileInfo = 'ResWareBasic_IReceiveFileInfoService', BindingSendSearchData = 'ResWareBasic_IReceiveSearchDataService' WHERE PartnerCompanyID = XXX --COMMIT