



SkySlope™  
*Transaction Management Software*



**Lone Wolf brokerWOLF and SkySlope Integration**

**October 1st**



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## **1 Introduction**

The Lone Wolf brokerWOLF system is capable of importing data from external sources. The data transfer is initiated from within brokerWOLF. The data transferred includes listings and/or transactions that has been updated or added (new) since the previous transfer. As such, there is typically a "datelastmodified" field that is populated by the external application to identify those records. In addition, the data transfer is one-way; data is imported into brokerWOLF from the external source and no capability currently exists to export brokerWOLF data to the external systems.

Two types of information are imported to brokerWOLF - Listings and open Transactions. The transfer mechanism for the integration is via Web service. The file format is eXtensible Markup Language (XML with a corresponding schema).

This integration leverages the SkySlope Web service to enable Lone Wolf's brokerWOLF system to pull transactions/listings from SkySlope and add them into brokerWOLF without re-keying.

## **2 Sales Process**

### **New SkySlope Office Process**

1. Customer notifies Lone Wolf that they want to integrate with SkySlope.
2. brokerWOLF can output a file to provide SkySlope within the office, which includes the Lone Wolf agent ids for each individual agent, First Name, Last Name, Phone # and email.
3. SkySlope use file provided to add Agent information included the unique "Public ID"

### **Existing SkySlope Office/New Lone Wolf User Process**

1. Lone Wolf client/Office manager can be provided a excel file with SkySlope "Public ID" per Agent.
2. In brokerWOLF menu option I.1.1 the public ID would have to match the Agent number. This can be modified in either brokerWOLF or SkySlope as long as they match. (See below in 3.3)

### **Client Login/Download Process**

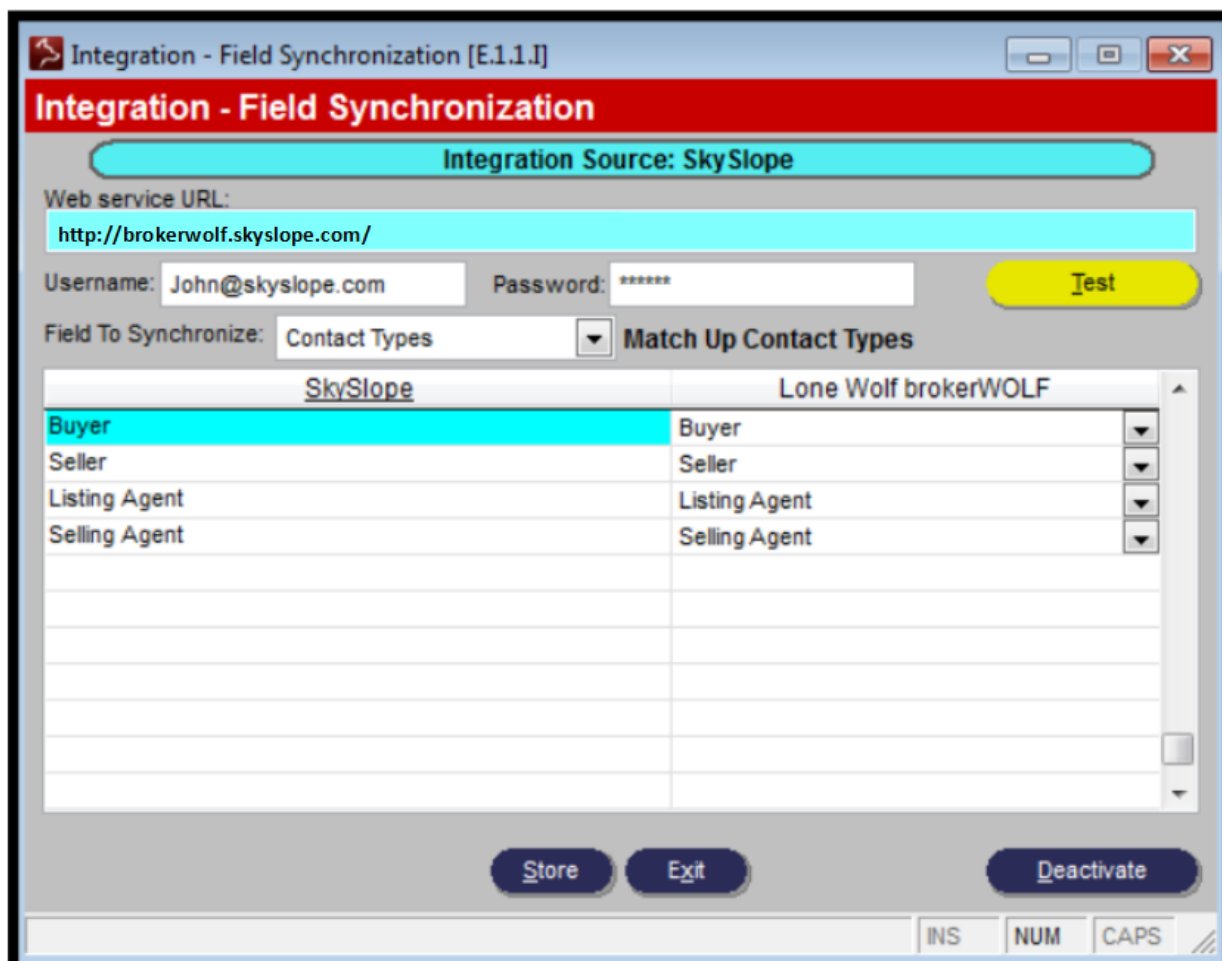
After establishing an account with SkySlope, you must enter your URL, username and password from SkySlope.

## **3 Setup**

### **3.1 SkySlope and brokerWOLF Field Synchronization**

3. Navigate to the Interface tab of the Company Profile (E.1.1).
4. In the Integration Source field select SkySlope and click on the Configure button.
5. Enter the SkySlope "Username and Password" in the boxes provided.

The username and password entered must match the file originator username and password in SkySlope



Integration - Field Synchronization [E.1.1.I]

**Integration - Field Synchronization**

Integration Source: SkySlope

Web service URL:  
 http://brokerwolf.skyslope.com/

Username: John@skyslope.com Password: \*\*\*\*\* **Test**

Field To Synchronize: Contact Types Match Up Contact Types

SkySlope	Lone Wolf brokerWOLF
Buyer	Buyer
Seller	Seller
Listing Agent	Listing Agent
Selling Agent	Selling Agent

**Store** **Exit** **Deactivate**

INS NUM CAPS

6. Select "Test" to verify connection

### 3.2 Assign Access to Users

1. Navigate to **Edit System Users** (E.2)
2. Select the desired group and click **Edit** or click on the **Group Access** tab
3. Under **Transaction Records**, select menu option 2.I
4. Click on **SkySlope Import**
5. Click on the yellow **7 Executive** button in the Legend
6. Select the **Store** button to save changes

Security Setup Screen [E.2]

### Security Setup Screen

List Detail Group Access User's Group Passwords

**Security for group: Administrator**

Option: [2.I] SkySlope Import  
Click To Select Level

**Legend**

- No Access
- 2 Read
- 4 Edit
- 6 Ins/Delete/Modify
- 7 Executive

7 Main Menu

- 7 [1] Property Listings
- 7 [2] Transaction Records
  - 7 [2.1] Transactions
  - 7 [2.2] Track File Requirements
  - No Access [2.I] SkySlope Import
  - 7 [2.L] Leads / Referrals
  - 7 [2.P] Transaction Reports
  - 7 [2.T] Print Trans. Records
- 7 [3] Trust Account
- 7 [4] Accounts Receivable
- 7 [5] Accounts Payable
- 7 [6] Commission Account
- 7 [7] Commission A/P
- 7 [8] Agent Management
- 7 [9] Staff Payroll
- 7 [E] Executive
- 7 [F] Financial Menu

Display:  
☒ All ☐ Restrictable Reports/Forms

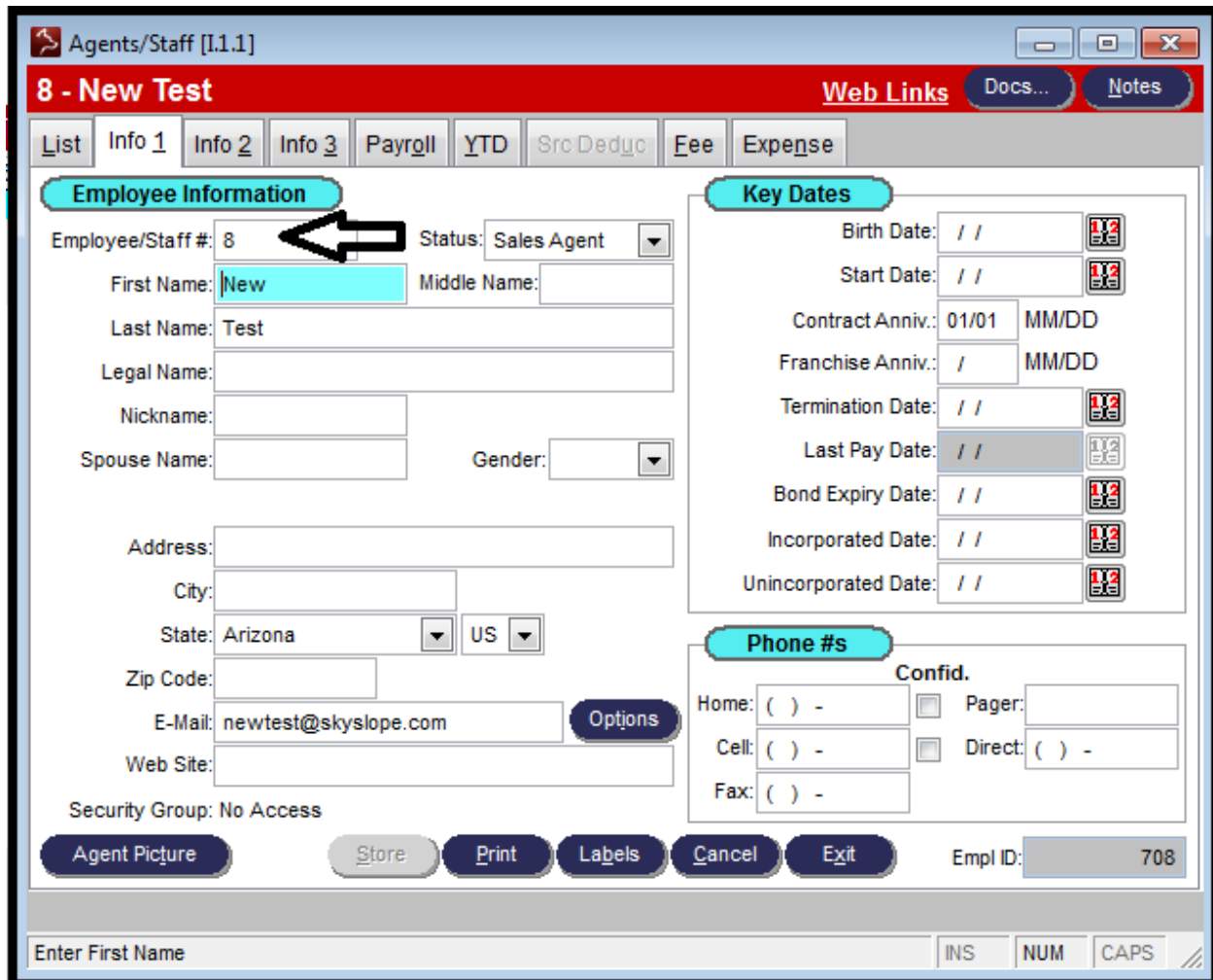
Store Cancel Exit

Double-Click a row to edit

INS NUM CAPS

### 3.3 Agent Id's:

To ensure that the agent information transfers on the transactions from SkySlope to Lone Wolf, you must match them in both databases. To locate the Agent ID in the Lone Wolf software contact the office administrator. The Agent ID can be found in menu option I.1.1, per Agent on the Info 1 tab (Employee/Staff #)



To enter or validate the Agent ID in SkySlope, log into SkySlope.

- Select "Admin"
- Select "Manage Agents"
- Select an agent and modify or validate the "Public ID" field.

**Add New Agent**

Broker	: Broker-Auditor John Doe		
First Name	: J.	Last Name	: Stanford-Carey
Type	: Agent	Title	:
E-mail	: john@skyslope.com	Password	: .....
Street Number	:	Street Name	:
Zip Code	:	City	:
Phone	: - -	State	:
Alternate Phone	: - -	Public ID	: 8
Deactivate User	: <input type="checkbox"/>	Use Digital Signature	: <input checked="" type="checkbox"/>

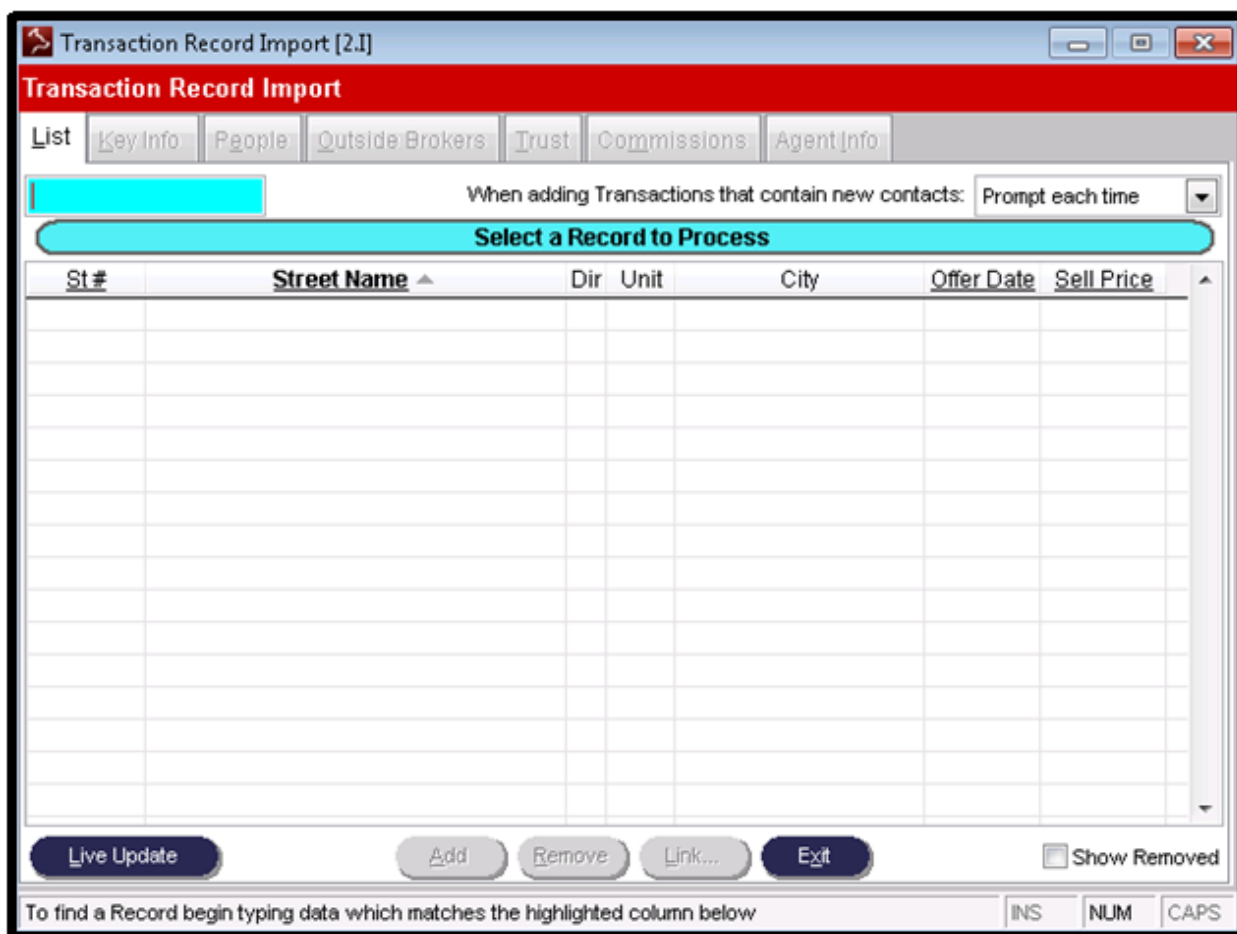
**Save** **Cancel**

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### Import Transactions and Listings:

Once the two accounts are successfully linked and the user's SkySlope credentials have been validated, Lone Wolf can retrieve an updated list of client listings and offers (transactions) by making a HTTPS POST call to SkySlope.

Go into menu option 2.I to start the integration process and click on the **Live Update** button

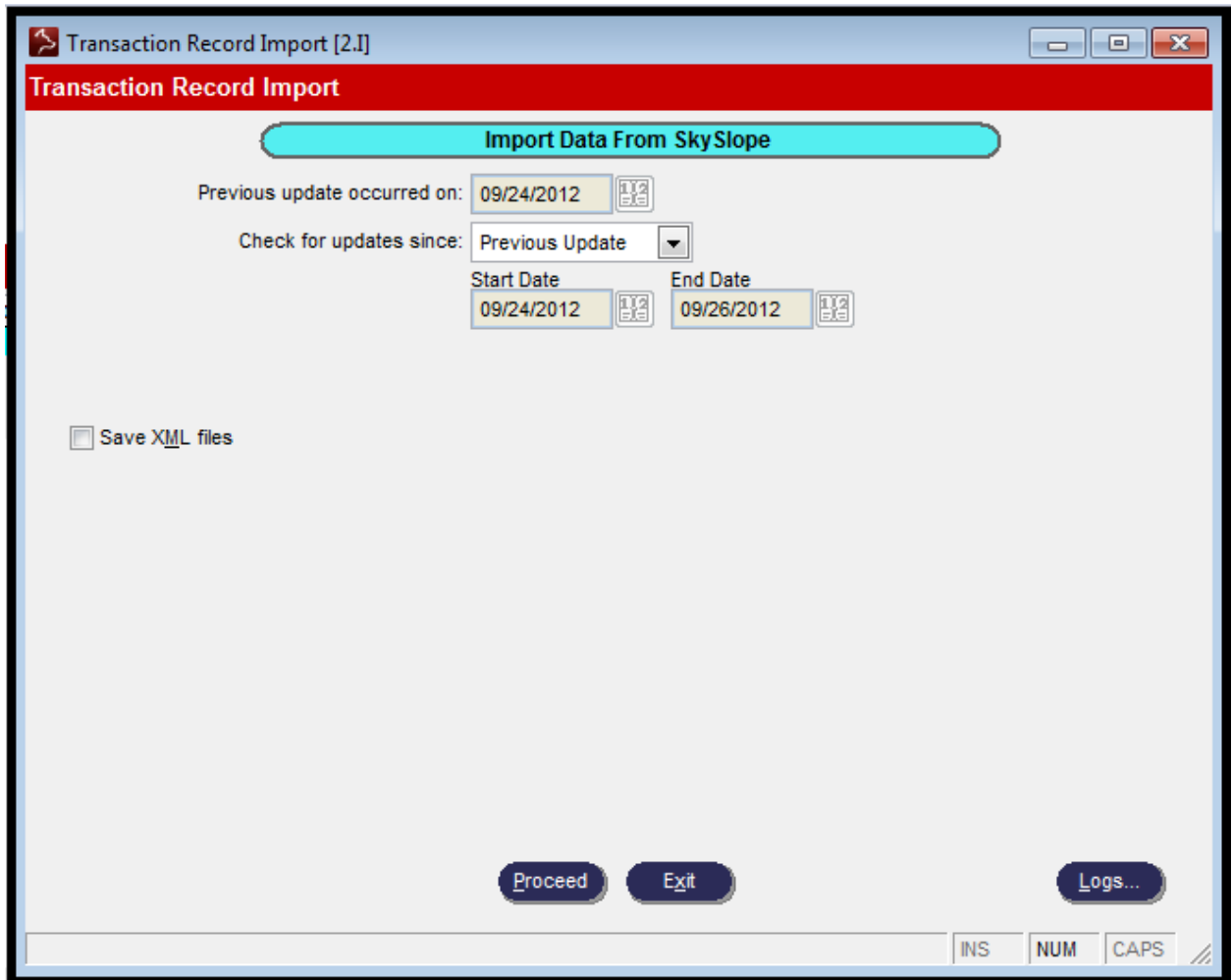


The screenshot shows a software window titled "Transaction Record Import [2.I]". It features a red header bar with the title "Transaction Record Import". Below the header is a tabbed interface with tabs for "List", "Key Info", "People", "Outside Brokers", "Trust", "Commissions", and "Agent Info". The "List" tab is active. A search bar is present with a dropdown menu set to "Prompt each time". Below the search bar is a blue bar with the text "Select a Record to Process". The main area is a table with the following columns: "St#", "Street Name", "Dir", "Unit", "City", "Offer Date", and "Sell Price". The table is currently empty. At the bottom of the window, there are buttons for "Live Update", "Add", "Remove", "Link...", and "Exit". A checkbox labeled "Show Removed" is also present. A status bar at the very bottom contains the text "To find a Record begin typing data which matches the highlighted column below" and three buttons: "INS", "NUM", and "CAPS".

St#	Street Name	Dir	Unit	City	Offer Date	Sell Price
-----	-------------	-----	------	------	------------	------------

1. Select a date range you want update from SkySlope to populate into brokerWOLF. "Previous update" will provide any data that has been added or modified in SkySlope since the last time you called the web service to update brokerWOLF in menu option 2.I (SkySlope)





The screenshot shows a software window titled "Transaction Record Import [2.I]". It has a red header bar with the text "Transaction Record Import". Below the header is a blue button labeled "Import Data From Sky Slope". The main area contains the following fields and controls:

- "Previous update occurred on:" with a date field set to "09/24/2012" and a calendar icon.
- "Check for updates since:" with a dropdown menu set to "Previous Update".
- "Start Date" with a date field set to "09/24/2012" and a calendar icon.
- "End Date" with a date field set to "09/26/2012" and a calendar icon.
- A checkbox labeled "Save XML files" which is currently unchecked.
- At the bottom, there are three buttons: "Proceed", "Exit", and "Logs...".
- At the bottom right, there are three small buttons: "INS", "NUM", and "CAPS".

2. Select **Proceed** to continue
3. You will be prompted to complete the setup and once you hit **OK** you will be re-directed to E.1.1.I
4. The user-defined, static values are manually mapped or synchronized between the two systems. Including "Classifications", "Contact Types", "Property Types".

Integration - Field Synchronization [E.1.1.I]

**Integration - Field Synchronization**

Integration Source: SkySlope

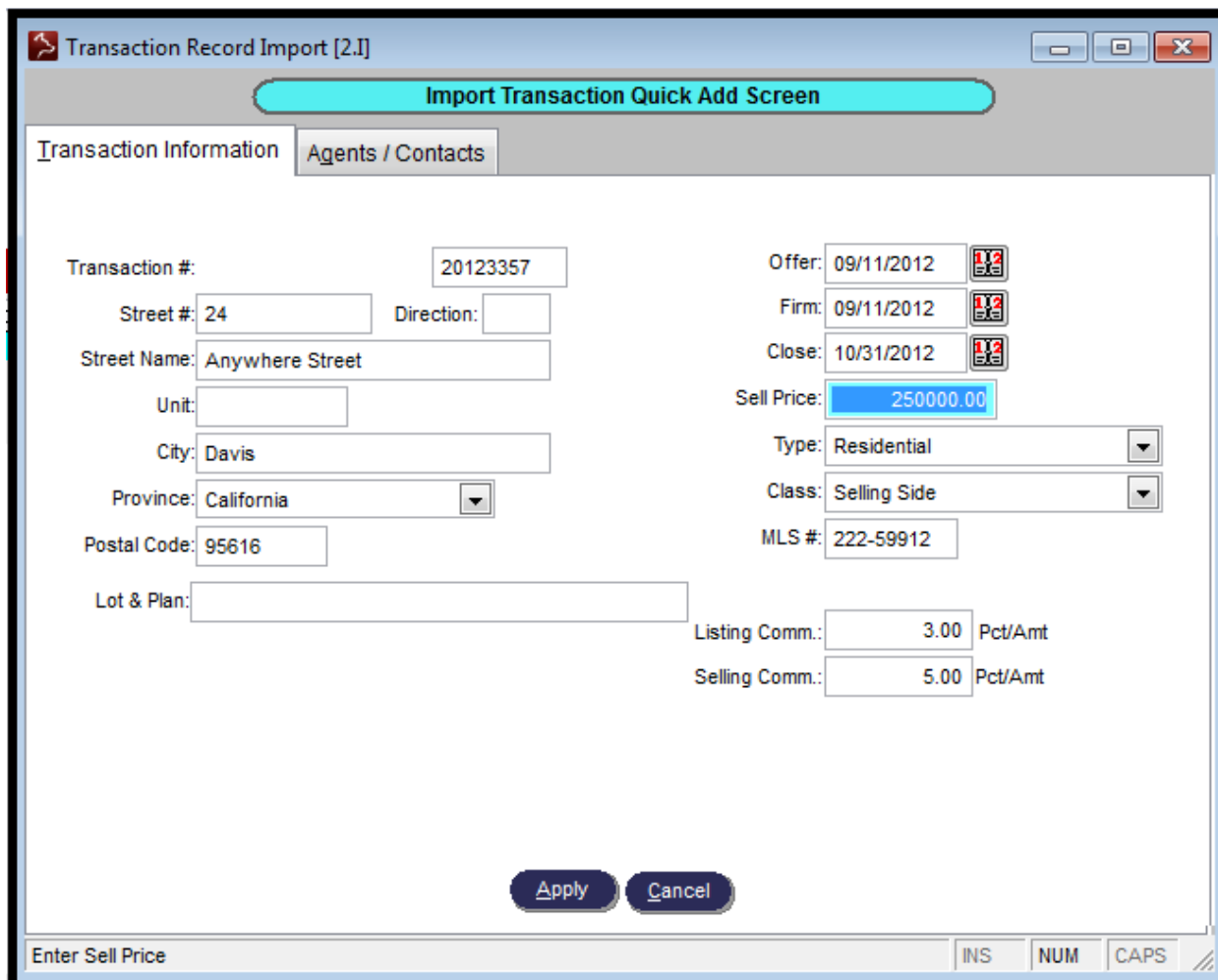
Web service URL:  
<http://app.skyslope.com>

Username:  Password:

Field To Synchronize:

<u>SkySlope</u>	Lone Wolf brokerWOLF
Buyer	Buyer <input type="button" value="▼"/>
Seller	Seller <input type="button" value="▼"/>
Listing Agent	Listing Agent <input type="button" value="▼"/>
Selling Agent	Selling Agent <input type="button" value="▼"/>

INS NUM CAPS



**Transaction Record Import [2.I]**

**Import Transaction Quick Add Screen**

**Transaction Information** | Agents / Contacts

Transaction #: 20123357

Street #: 24 Direction:

Street Name: Anywhere Street

Unit:

City: Davis

Province: California

Postal Code: 95616

Lot & Plan:

Offer: 09/11/2012

Firm: 09/11/2012

Close: 10/31/2012

Sell Price: 250000.00

Type: Residential

Class: Selling Side

MLS #: 222-59912

Listing Comm.: 3.00 Pct/Amt

Selling Comm.: 5.00 Pct/Amt

Apply Cancel

Enter Sell Price INS NUM CAPS

Active listings are automatically inserted into 1.1. Open/pending transactions are held in (2.I) the "holding" area. Your administration staff can choose to add them into 2.1 (Trades/Transactions) by selecting apply on each transaction and storing them into the brokerWOLF program. Transactions can be left in the holding area until paperwork is properly processed and the transaction can be considered valid.

## Revision History and Approvals

**Version:** v.1      **Modified By:** Jen Ball      **Date (y-m-d):** 2012-10-01

### Change Description:

- Initial release