Lone Wolf brokerWOLF and SkySlope Integration

October 1st

Contents

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

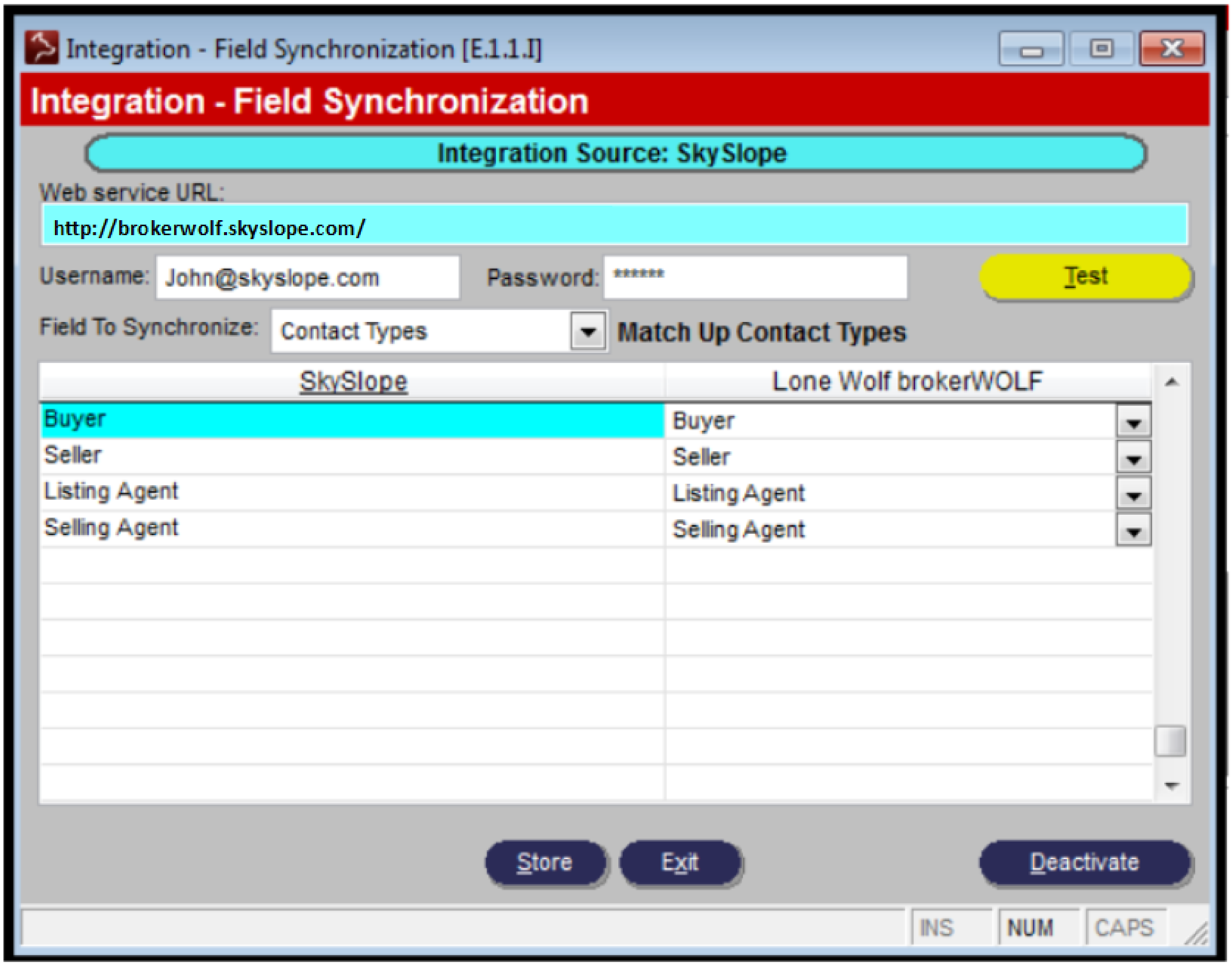
After establishing an account with SkySlope, you must enter your URL, username and password from SkySlope.

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.

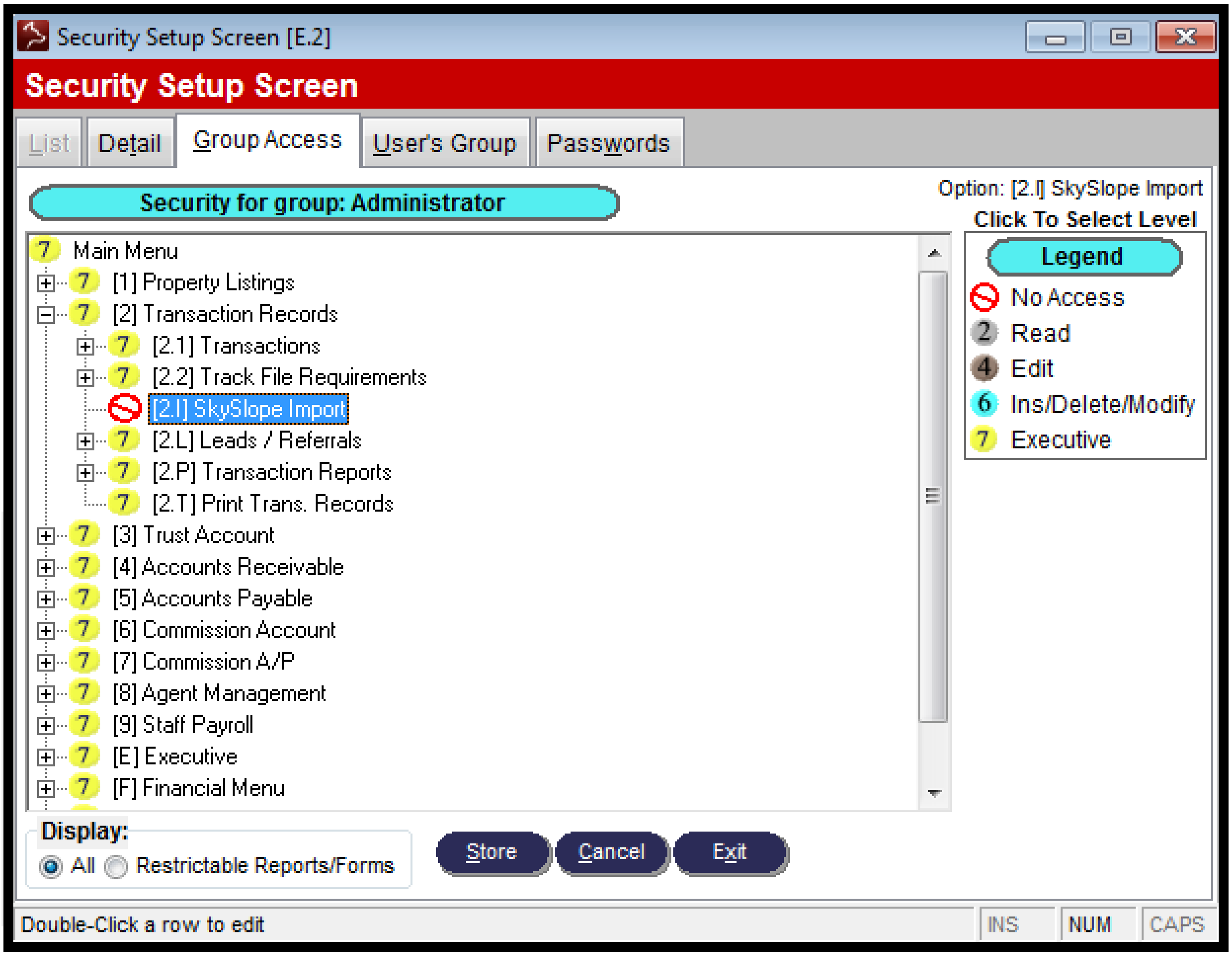
The username and password entered must match the file originator username and password in SkySlope



6. Select "Test" to verify connection

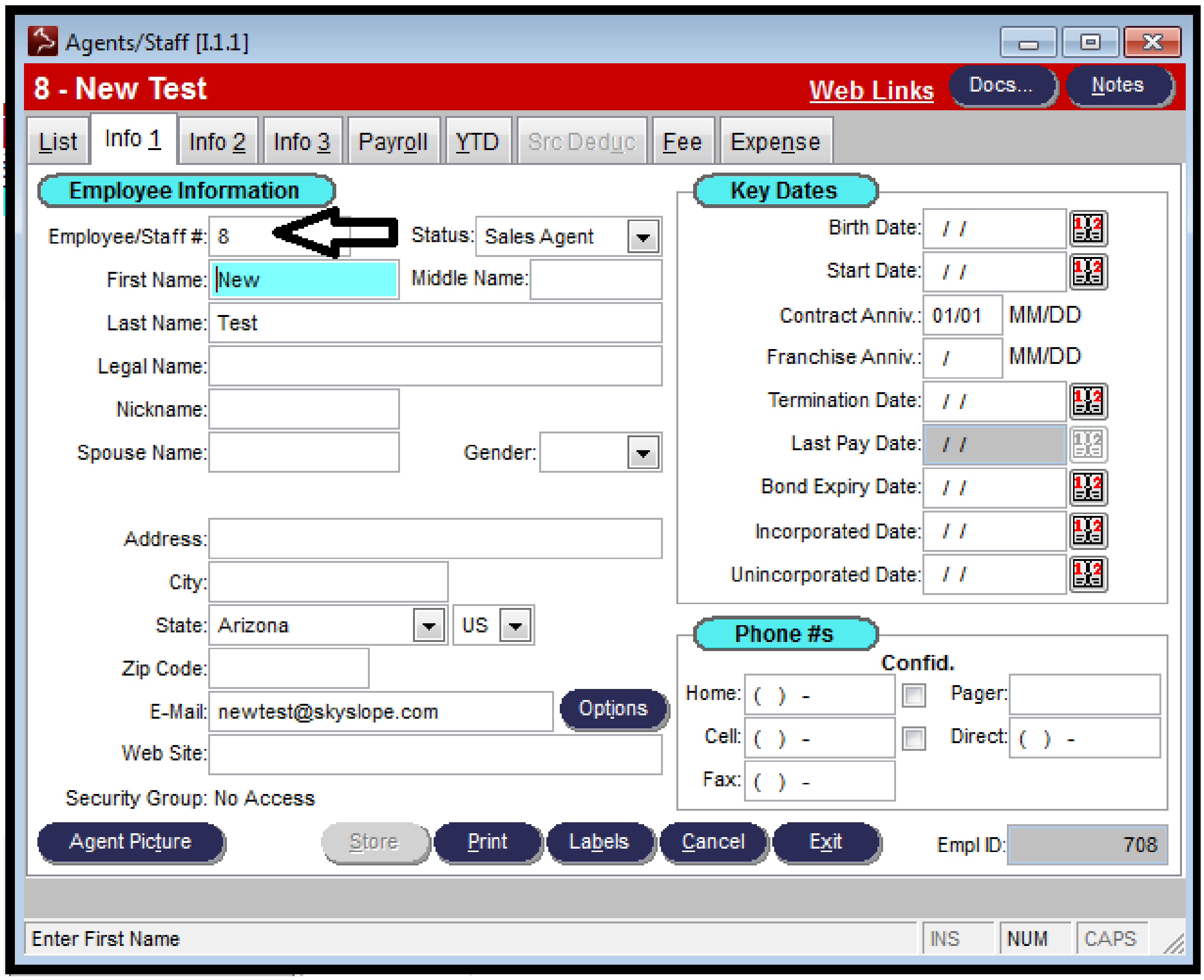
3.2 Assign Access to Users

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
Main Menu
[1] Property Listings
[2] Transaction Records
[2.1] Transactions
[2.2] Track File Requirements
[2.I] SkySlope Import
[2.L] Leads / Referrals
[2.P] Transaction Reports
[2.T] Print Trans. Records
[3] Trust Account
[4] Accounts Receivable
[5] Accounts Payable
[6] Commission Account
[7] Commission A/P
[8] Agent Management
[9] Staff Payroll
[E] Executive
[F] Financial Menu
Legend
No Access
2 Read
4 Edit
6 Ins/Delete/Modify
7 Executive
Display:
All
Restrictable Reports/Forms
Store
Cancel
Exit
Double-Click a row to edit
INS
NUM
CAPS

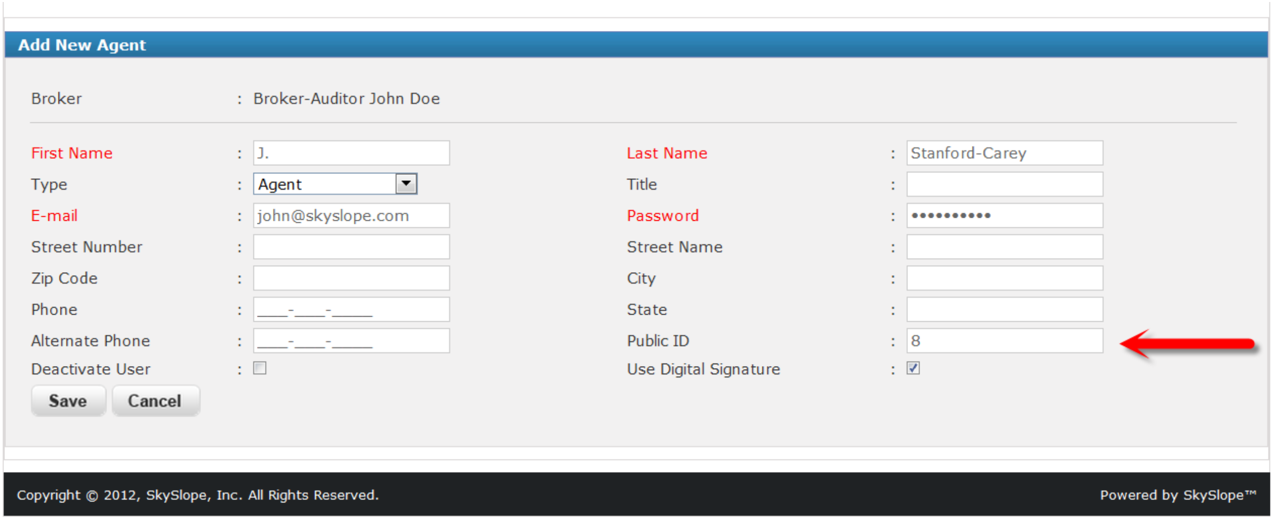
3.3 Agent Id's:

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.

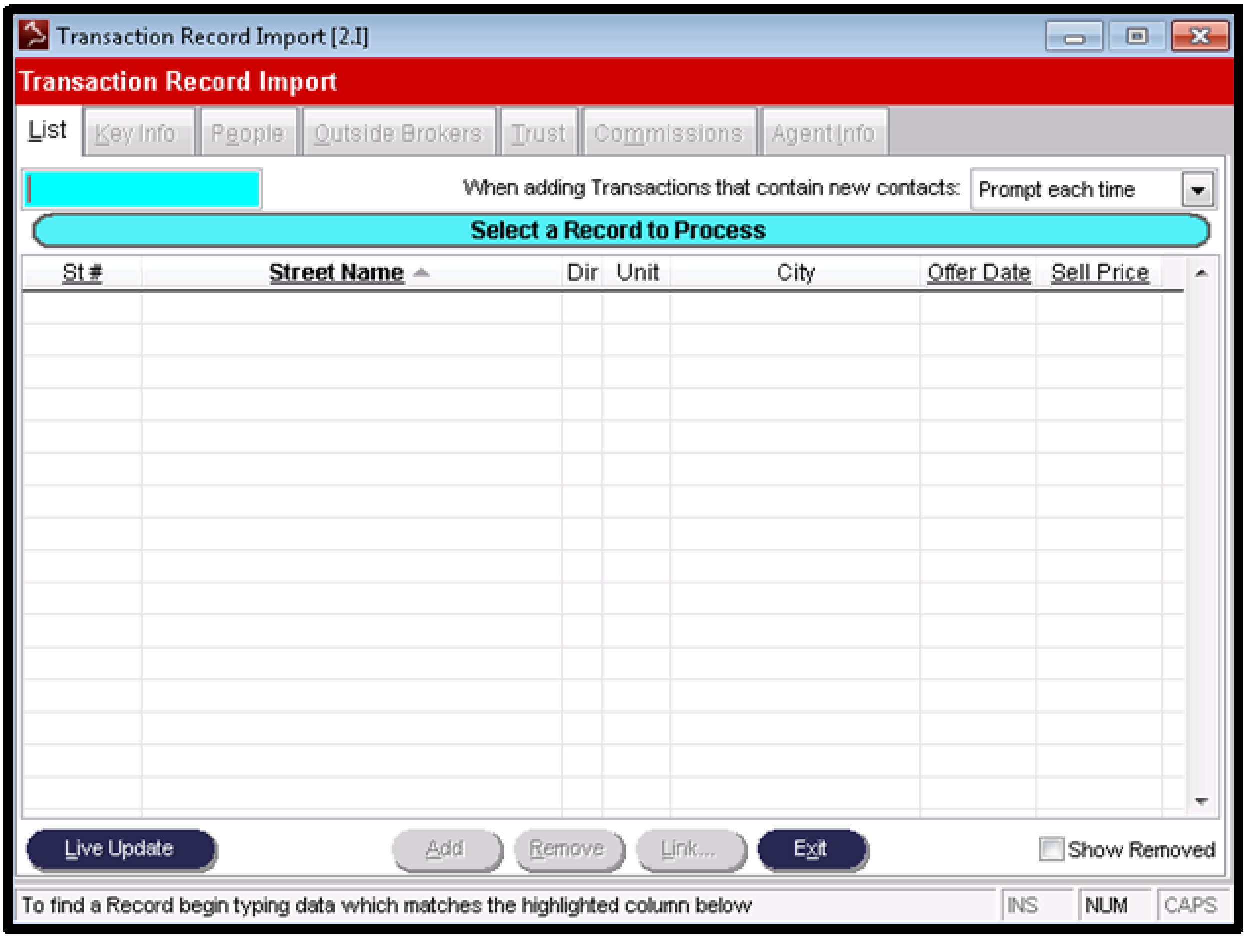
- Select "Admin"
- Select "Manage Agents"
- Select an agent and modify or validate the "Public ID" field.



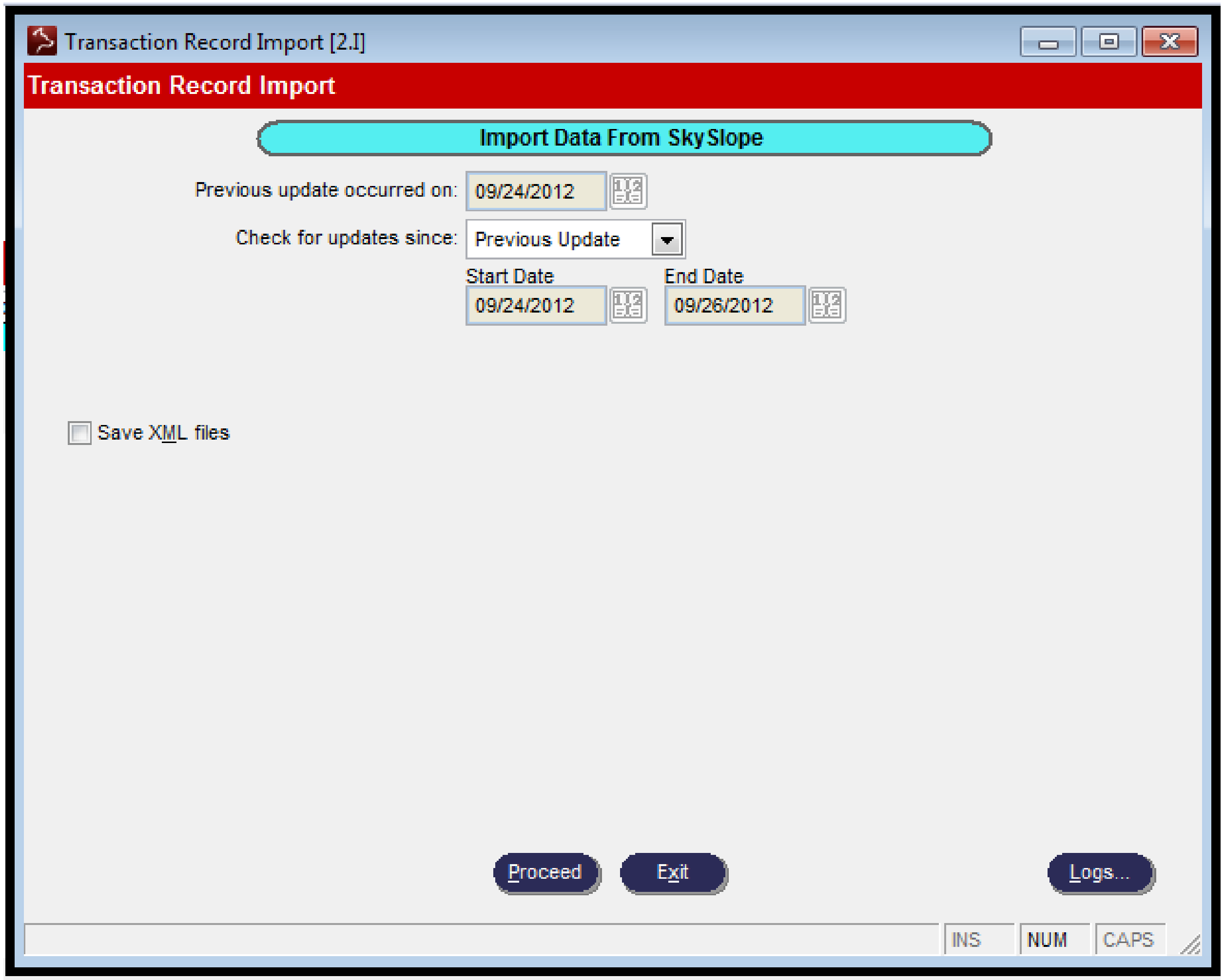
Import Transactions and Listings:

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.

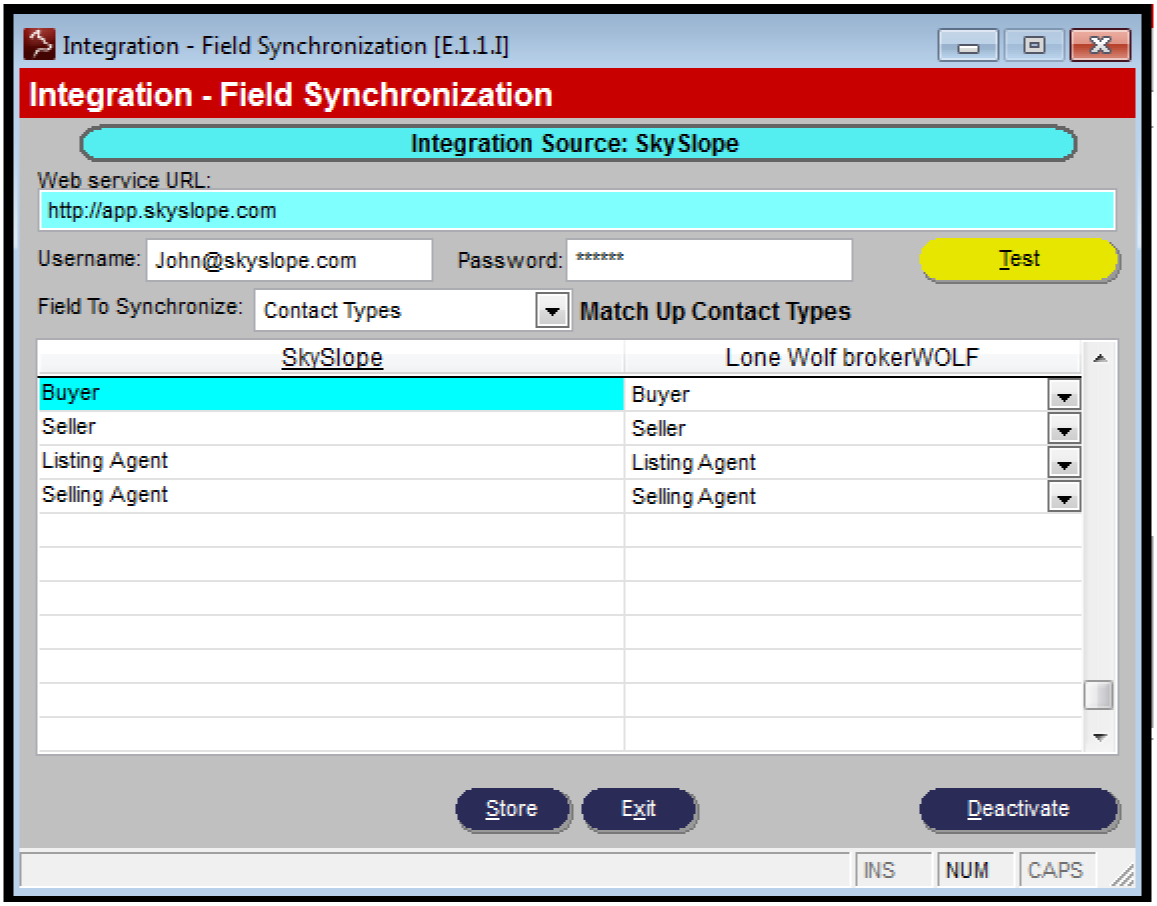
Go into menu option 2.I to start the integration process and click on the **Live Update** button

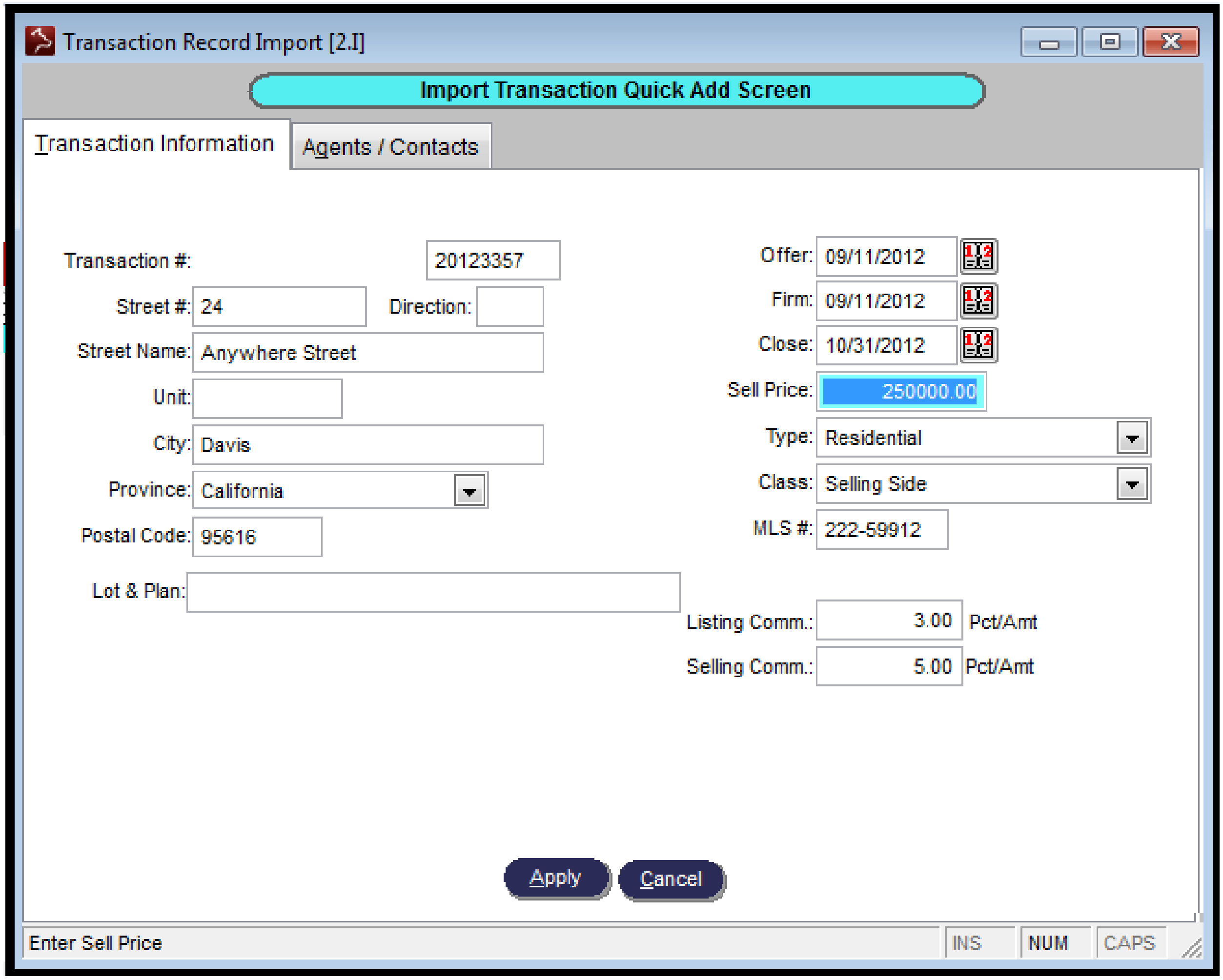


1. Select a date range you want update from SkySlope to populate into brokerWOLF. "Previous update" will provide any data that has been added or modified in SkySlope since the last time you called the web service to update brokerWOLF in menu option 2.I (SkySlope)



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: 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



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