Champions School of Real Estate

Clearly Closing Integration

**Transmittal Data**

Champions will create the CSV file and upload every 12 hours.

Available fields will be:

*FirstName,LastName,AddressAddress2,City,State,Zip,Email,Phone,Cell,Carrier,Agency,*

*AAddress,AAddress2,ACity,AState,AZip,APhone, Status, [field for Champions ref #] We have a Student ID field. Can we pass this same ID number to you so both systems have the same ID # associated to the student? Or at least keep our ID # in addition to yours.*

1. Mandatory fields are FirstName, LastName, Email, Status, Student ID
2. All other fields are optional for population. Optional fields, if provided, will be populated into User Profile in Clearly Closing. Records with missing mandatory data will not be processed and noted as such on process summary report.
3. Email will be considered unique to all Clearly Closing agent records. Any record containing an existing email match or an email string not in an email format will be rejected and noted as such on process summary report.
4. Status field must contain either “New” or “Cancel”. Any record with a status not matching will be rejected and noted as such on the process summary report. Can we change New to “Enrolled”? We have a status field and currently use “enrolled” to signify someone who has paid and is enrolled in the course.
5. CSV file must be uniquely named to prevent overwrite in the containing ftp folder in the unlikely event that a file is not process before another file is uploaded. I have no preference for a naming convention because I will only be looking for any file with .csv extension. Possibly creating using a date time stamp as the name will always be unique. Time stamp should work fine.
6. Records with a status of “Cancel” will be processed according to the Cancellation rules as set forth below.

**Process and Summary Report**

Clearly Closing will build a utility application that will run on the server every hour looking for new CSV submissions.

Every record contained in the CSV file will be noted on the Process Summary Report.

The report will contain the name of the file processed, the date and time processed, number of new records, number of cancelled records, number of rejected records. The report will be sent by email to any designated email addresses agreed upon by Clearly Closing and Champions. Each record listed will have associated with it the Status Requested, the Status Returned - “Processed”, “Rejected”. All rejected records will have the reason listed. Can we also have our Student ID in this report?

Newly created records will immediately be sent a welcome email to the client which will contain their login credentials, Clearly Closing Terms of Use (as this is now skipped in the registration process), and application support information. The return policy terms will be communicated to the user by Champions as they are the payment processor. Upon processing payment, we can have a receipt email generated with the return policy clearly stated along with telling them they will be receiving the welcome email from Clearly Closing.

The welcome email will be co-branded with Clearly Closing and Champions School of Real Estate logos. Champions logo can be a link back to the Champions site, and any Champions copywriting including the location of the Return Policy information.

The welcome email may contain the ‘warning’ information concerning their control of when the activation starts and any other agreed upon verbiage. We will want to see the email so we can see what verbiage we can add to this email.

**Activation, Cancellation and Expiration**

All Champions clients, upon validating login credentials, will be directed to a page that contains verbiage outlining the conditions of first time use as well as the “I’m Ready To Start My Subscription” button that will trigger the clock.

All New subscriptions will have 90 days to see this page. On day 91 they will be taken directly into the application.

*Activation is defined as: They click the I’m Ready… button or 90 days has passed.*

Once they are activated, their expiration date will be set to the same day of the month 13 months forward.

Cancellation Rule - The system will only process a Cancellation request on or within 5 days of the activation date as defined above or if the record is maintaining a status of not yet activated. (In other words they have not clicked on the button and 90 days has not passed). Upon cancellation, the agent will be immediately locked out of Clearly Closing and a notice of lock out will be sent to the agent.

Upon receiving Cancellation notice, user access will be terminated and an email will be sent to the user from Clearly Closing stating that access is terminated and all data within their Clearly Closing account will be deleted. If a student uses their subscription and gets to the 13th month time limit, how is Clearly Closing handling the notification and deletion of their account? How many days will the student have to renew before their data is deleted? I would hate for a student to use this, input a lot of data and then have it all wiped because they did not renew timely.

I think we should give multiple notices before their subscription expires. Email generated 30 Days, 15-days, 5 days and Day of cancellation letting them know they are about to lose their information?

**Invoicing**

Invoicing will be done on the 1st day of each calendar month. Invoicing will list each record requesting payment for as well as credits for any cancellations processed for which payment has already been received. Each listed record will display the upload batch number, the Champions reference number (if provided) and the date it was processed for auditing.

When payment is received each Clearly Closing record will be stamped with the invoice number (because we know in an imperfect world and thousands of records in a dynamic process there will be reconciliations questions that arise).