

WebConnect® Interface Submission

Click the **Send** button to submit the completed online form.

Fax or email the completed form to (214) 252-5650 or interfacecertification@calyxsoftware.com.

Email account and agreement changes to the Interface Account Manager at calyxnetwork@calyxsoftware.com.

Important: Only the service provider contracted with CalyxSoftware and listed as the interface provider in Point is authorized to submit this information. To include your listing in multiple categories, an agreement for each additional listing is required. A separate submission form must be completed for each listing.

Submission Date: _____	CalyxSoftware Account ID: _____
Company Name: _____	
DBA, if applicable: _____	

Contact information

Provide contact information for administrative, technical, and billing questions.

Important: Please notify the [Interface Account Manager](#) as soon as possible when any contact information changes.

Project Manager

The Project Manager handles the business relationship between your organization and CalyxSoftware and is the point person for the entire project.

Name	Phone	Ext	Fax
Street	City	State	Zip
E-mail address	Title	Mobile phone	-

Technical contact

The technical contact is the person who CalyxSoftware should contact if there are any technical issues with the interface. If a technology provider assists with development of your interface, please provide their information.

Company Name (if technology provider)			
Name	Phone	Ext	Fax
Street	City	State	Zip
E-mail address	Title	Mobile phone	-

Additional contact (optional)

The additional contact is the person to whom CalyxSoftware will distribute Point/WebConnect SDK releases.

Name	Phone	Ext	Fax
Street	City	State	Zip
E-mail address	Title	Mobile phone	-

Who should receive new Point/WebConnect SDK releases? (Select all that apply.)

- Project Manager Technical contact Additional contact

Point configuration

Provide information about your Point listing.

Listing explanation

The following table describes how your profile information will display in your interface.

Note: Each WebConnect interface name must be unique. In addition, your interface name should be the same, or nearly the same, as the name on the interface agreement addendum.

Name	Description	Where displayed
Interface name	Entire company name or abbreviation (licensed name designated as the listing in Point).	<ul style="list-style-type: none"> • Main menu name <ul style="list-style-type: none"> ○ (Lenders) on the <i>Lenders</i> menu ○ (Service Providers) selected from the company category on the <i>Interfaces</i> menu • Errors and warning titles
Company website name	Website name (not the URL) is displayed in these Point screens, tabs, and buttons. Refer to the Integration Guide for examples of the screens.	<ul style="list-style-type: none"> • <i>Mortgage Lenders—Lenders</i> menu <ul style="list-style-type: none"> ○ Submenu name under your menu ○ Tab name (on the screen that contains the Launch button) • <i>Service Providers—Interfaces</i> menu <ul style="list-style-type: none"> ○ Name in your category • <i>Lenders and Service Providers</i> <ul style="list-style-type: none"> ○ Errors and warning title bars ○ Launch button name ○ Exit <Company Website> button ○ WebConnect browser title bar
Company loan ID label	Label for loan ID referenced in Point loans. The loan ID is shown on the interface transaction monthly billing report.	In the interface screen, the name for [<i>Company</i>] Loan ID, [<i>Company</i>] Loan Number, or Reference number, etc. A screen is provided upon request after this form is submitted.
Company Getting Started link	URL to your web page	<ul style="list-style-type: none"> • Lenders <ul style="list-style-type: none"> ○ Submenu level ○ Profile tab—next to your <Company Website> name • Service Providers <ul style="list-style-type: none"> ○ Profile screen
Production Service URL	Your initial landing page	Internet Explorer <i>browser</i> page that is displayed when user clicks Launch <Company Website> .

Menu information

- Lenders (Mortgage Lenders Only) Interfaces (Service Providers only)

Category information (Service Providers only)

The Service Provider name is listed on the Interfaces menu in one of the following categories. Select the category where your company name should appear. (Select only one.)

- | | | |
|---|---|--|
| <input type="checkbox"/> Appraisals | <input type="checkbox"/> Automated Underwriting | <input type="checkbox"/> Title/Escrow |
| <input type="checkbox"/> Bundled Services | <input type="checkbox"/> Disclosure Fees | <input type="checkbox"/> Verification Services |
| <input type="checkbox"/> Closing Docs | <input type="checkbox"/> Fraud Detection | <input type="checkbox"/> Additional Services |
| <input type="checkbox"/> Compliance | <input type="checkbox"/> Mortgage Insurance | |
| <input type="checkbox"/> Credit Reporting | <input type="checkbox"/> Product and Pricing | |

To include your listing in more than one category, an agreement for the additional listings is required. A separate submission form must be completed for each listing.

Important: The category or menu where your listing is located in Point must match the menu location designated in the license agreement. CalyxSoftware reserves the right to change a company menu location.

Technical information

The information in this section is used to configure your Point interface in your production environment. Your WebConnect interface will be deployed in Point with the information entered here. If you use the services of a technology provider, verify this information with them.

At the time of form submission for certification, these URLs must be in working order. You can change the content of these pages at any time (as you go to production, deploy upgrades, etc.). Contact your Interface Support Engineer to use an unsecure (http) address as the Company Service URL.

Account ID (assigned by CalyxSoftware, located on the Agreement)

Interface name (listing in Point)

Company website name (not required to be a URL)

Company loan ID label (loan reference number field label in Point)

Getting Started URL link (for Marketing, signup, and support for Point users)

Production Service URL (the first page of the website when launched from Point)

https://

Screen shots

Provide a series of screenshots to demonstrate the proper usage of the WebConnect method *GetCalyxLoanData*. These screenshots can be from your production site or a test website. Provide a separate, entire, contiguous sequence of screens for each Point version that your website will support.

Please submit screen shots in a separate Microsoft Word or PowerPoint file.

Sample sequence:

1. About Point screen from the Help menu that shows the Point version and build number used for the screen prints.
2. Page 1 of the Loan Application or the Borrower Information screen, with loan data.
3. Website launch screen, with empty Loan ID field.

4. First website landing page shown in your website dialog box.
5. Additional website pages, including login process.
6. Website page that demonstrates that the website was populated with loan data from Point (using the `GetCalyxLoanData` method).
7. Your website tab in Point that contains a new Loan ID populated using the `SetCompanyLoanID` method (if applicable to your interface).
8. A subsequent launch of the website landing page shown in your website dialog box.
9. Additional website pages that demonstrate that the loan context was preserved without the user having to select the same loan record again on the website.

Implementation

The following questions are needed so we can better support your interface and plan for new features. It is important that you inform CalyxSoftware when significant changes or updates are made to your website that affect to the WebConnect interface.

Initial rollout features

1. What loan data formats are read from Point? Select all that apply.
 Fannie Mae 3.2 Calyx Closing 2.6 without TRID Calyx Closing 2.6 with TRID
2. Are you sending a loan ID or reference number to Point? If yes, how are you using this number?
3. Are you sending loan data to Point? If yes, please briefly describe the data you are sending.
4. Are you sending statuses or documents to Point? Select all that apply.
 Statuses Documents

Future implementation

1. What new features do you plan to implement in the future? Please provide date estimates, if possible.
2. Are there any additional data sets or new features you would like in Point to support the new features that you have planned?

Testing information

Your WebConnect interface might be included in multiple Point versions. Unless otherwise specified, your interface is included in all prior Point versions that are supported by the I-Update.

Testing confirmation

CalyxSoftware adds enhancements and fixes to WebConnect as needed. We highly recommended that you test each Point version to determine whether you want to support all available earlier versions.

We confirm that WebConnect interface testing was conducted on the following Point versions:

- If your testing is still in progress and you are not able to confirm testing at this time, send your testing confirmation before the release of the interface. A test executable will be sent to you prior to the release and followed up by the Interface Support Engineer. Please send final test confirmation during the follow up.
- If you have found some issues with your interface in any of the Point versions, please notify the Interface Support Engineer immediately.

Supported versions

When testing is complete, if you do not want your interface included in a particular Point version, you can configure your interface to detect the Point version and issue a message to the user in your web page using the *GetCalyxApplicationBuild* method. Refer to the Technical Integration Guide for information about detecting the Point versions.

Which Point versions do you plan to support?

If you are not supporting all Point versions, provide a screen shot that contains the message you will display to Point users when they launch your interface from an unsupported version.

Marketing information

When your interface is released, CalyxSoftware will add your company information to our Calyx Network list on our website. Provide your company information as you want it to display on our website and in any brochures or marketing literature that CalyxSoftware produces.

Company Name		Phone	Fax
Street	City	State	Zip
E-Mail Address		Website Address	

Marketing contact

Please provide information for the person to contact about marketing-related activities.

Marketing Contact		Title
Phone	Ext	Email

Contact [Jenny Harlowe](#) in CalyxSoftware Marketing with any marketing questions or to update your marketing contact information.