

HomeBinder and ISN Integration Doc

This is a step by step guide to integration your HomeBinder account with ISN. Please visit the HomeBinder Support Center Article for detailed instructions (Updated) and a recorded video walkthrough by clicking here: <https://support.homebinder.com/inspector-help-center/integrations/setting-up-your-isn-integration>. If you have any questions about this process don't hesitate to call us at 1-800-377-6915 or email us at support@homebinder.com

Step 1: On your computer, open up two tabs in your web browser. Login to ISN and login to your HomeBinder account (www.homebinder.com/login)

Step 2: In your HomeBinder tab, click on "Settings" on the left hand side. And then click on "Automation" Copy the API KEY (all the letters and numbers)

Step 3:

- Click on your ISN tab and go to the "**Email**" drop down menu at the top of your screen and click on "**Get Templates and Containers.**"
- Click on "**Containers**" just to the right of templates. Scroll down a little bit until you see "**Blank Container.**" Once you found the "Blank Container" click copy this to ISN and then click "OK"
- Go back to the "**Email**" drop down at the top and click on "Get Templates and Containers" one more time. The second template down will say "**HomeBinder.com Integration Template.**" Copy that to ISN and click on "OK"

Step 4: In the search bar on the left hand side (Searching your templates) type in "**homebinder**" (all lower case, one word) and Click on the **Pencil** button to edit the template.

- The third field down is the drop down for the container that you want to use for the template. Click on the drop down and choose "**Blank Container**"
- Next, check off the first box that says "**always attach report**" (if report exists). You want to check this off so that your inspection report can make its way into the clients HomeBinder account in the documents section.
- You can also check off "Always attach public attachments" this is optional, but it will allow for any public attachment on the inspection to also upload into your clients HomeBinder account.

Step 5: Editing the text box of your Integration Template

- The first line of text will say “**API Key**” click next to the colon, and hit the spacebar on your keyboard, and then paste. (This will paste all the numbers and letters from your HomeBinder account)
- Click back on your HomeBinder tab and copy your “**API Route Name.**” After you have copied, go back to ISN and paste next to where it says “**Partner Name**” **Make sure there is a space between the colon and the Partner Name**
- Go back to your HomeBinder tab in your web browser, and copy the 4 digit “**Template ID.**” Once you have copied your “Template ID” go back to ISN and paste next to “**Binder Template ID.**”

Canadian Inspectors: *At this point in the integration, if you live in Canada, make sure that you change the “Property Country” from “US” to “CA”*

- Scroll all the way down to the bottom of the textbox and click next to the last “%” and highlight from there all the way up to where it says “Seller Agent Name” and Delete. You want to delete all the seller agent fields because we don’t want to load multiple agents into each HomeBinder account.
- Click on **SAVE TEMPLATE**

So now that we have set up the integration template we are going to create the Email Event for the template to function.

Step 6: HomeBinder Integration Email Event

- Click on the “**Email**” drop down menu at the top of your ISN account. And click on “**Email Events**”
- Click on the green “**Add Event**” button
- In the “**Name**” field type in “HomeBinder Integration Email Event”
- “**Senders Name**” Type your name.
- “**Email Address**” → Type in your email address
- Leave “**Blind Carbon Copy**” blank (This will quickly annoy you in your email 😊)
- “**Select What Triggers This Email Event**” → Choose the 2nd one down that says “**When the Report is Completed**”
 - **if you don’t upload your reports to ISN you may want to choose the Date and Time of Inspection. We don’t generally recommend that because then your reports won’t make their way into the clients binder**
- “**When should we send this email**” → Leave this set somewhere between 1-30 minutes. Totally up to you. This is when HomeBinder will receive the information necessary to create the binder. We recommend setting to as soon as possible after the inspection is complete.
- “**Who will Receive this Email**” → Click on the drop down and choose “**Other**” at the bottom.
 - Name: HomeBinder

- Email Address: binders@homebinder.com
- **“What Template should be used”** → Choose the **“HomeBinder.com Integration Template”**
- **“This event is valid for these Inspection Types”** → click on the drop down and choose **“Specific Inspection Types”** and check off all the inspection types that you would like to create HomeBinder’s for.
- **“Payment Status”** → If you do ALL of your payments through ISN (or mark every inspection as paid) choose **“Paid”** inspections, so that way no one gets a HomeBinder account unless they paid for the inspection
- **“Signature Status”** → If you do your agreements through ISN, choose **“Signed”** inspections.
- So in summary, no one will have a HomeBinder created for them, unless it matches the inspection types, the inspection is complete, paid for, and the inspection agreement has been signed.
- Click on “Add Email Event”

Step 7: Automating the Creation and Transfer of HomeBinder’s

- Find the **“HomeBinder Integration Email Event”** in your Email Events page in ISN. It will be sorted alphabetically. You will want to switch this from the red **“Off”** position to the **“On”** position.
- Once you have turned the Email Event on you have successfully automated the creation of HomeBinder accounts for all future scheduled inspections. If you want to set up previous clients with HomeBinder, follow the directions at the bottom of this document.
- **Binder Auto Transfer** → Now that binders are automatically going to set up for your clients, we want them to automatically send the binders to your clients. This is done through a transfer email that comes out of HomeBinder. Click on your HomeBinder tab in your web browser.
- Click **“Edit”** at the top right hand side of your screen. Now check of the **“Binder Auto Transfer”** box and click **“Ok”**
 - This will automatically send binders to clients based on the **“Binder Transfer Delay”** Defaulted to 1 hour after creation.
- We also recommend checking off the **“Send Agents Transfer Notifications”** box as well so your agents will receive a one time email letting them know that you have created a HomeBinder account for your clients, at whatever their property address is, and most importantly, that you will be keeping their name in front of the client throughout the time that they are in the Home. (provided your account is set to **“Cobranding”**) It will also give them access to their own unique profile, where they can log in to update info, add headshots and logos etc.

Congratulations you have successfully integrated your HomeBinder account with ISN.

LAST STEP (PLEASE DON'T SKIP): Send support@homebinder.com an email that says "I integrated my account with ISN"

Setting Up Previous Clients through ISN

Many inspectors that we talk to want to set up previous clients that have inspection orders logged in ISN prior to setting up this integration. It's very simple to do this.

While you're viewing an inspection order, click on the "Actions" drop down menu and select "Send an Email Template"

Then, fill out the form as follows:

1. Template: HomebBinder.com Integration Template
2. From: Leave this as your default business email
3. To: binders@homebinder.com
4. Then click "Send Email Template"

The binder will automatically create and then automatically send to your client!

Let us know if you have any questions!