



## Integrating your HomeBinder Account in Horizon

This document illustrates the process for automating the binder creation process on HomeBinder for users of Horizon Report writing software. Once completed an inspector will be able to create binders with just 1-click on the Report Publishing screen in Horizon software.

### **General Description**

For an inspector that uses Horizon and wishes to incorporate an automated way of creating binders, they will need to sign up for an account on HomeBinder first and then enter three key parameters into the Horizon system.

These parameters are:

1. **API Key** - A string of numbers and characters that uniquely identifies all HomeBinder users.  
Example: *32d982944b36410f86c1bddf1fb4d19b*
2. **Route Name** - The specified path so that the two systems know how to “talk” to each other.  
Example: *jsmith* or *aplusinspections*
3. **Template ID** - The identification of the template that the inspector wishes to use in their HomeBinder account for default parameters to create Example: *1223*

In addition, to automate the process of transferring binders from the inspector’s account to the client, there is an additional step (Step 6) that must be completed. Inspectors can skip this step if they want to transfer binders manually, however that is not typically done by most inspectors.

This document illustrates how to get the three parameters from HomeBinder and enter them in the Horizon system, and subsequently how to create a binder with “one click”.

**\*\*\*NOTE: DO NOT FORGET TO COMPLETE STEP 6 AS IF THIS IS NOT DONE, THE PROCESS FOR TRANSFERRING THE BINDERS TO YOUR CLIENTS WILL NOT BE AUTOMATED.\*\*\***

**QUESTIONS?**

Call 800-377-6915 or email [support@homebinder.com](mailto:support@homebinder.com)

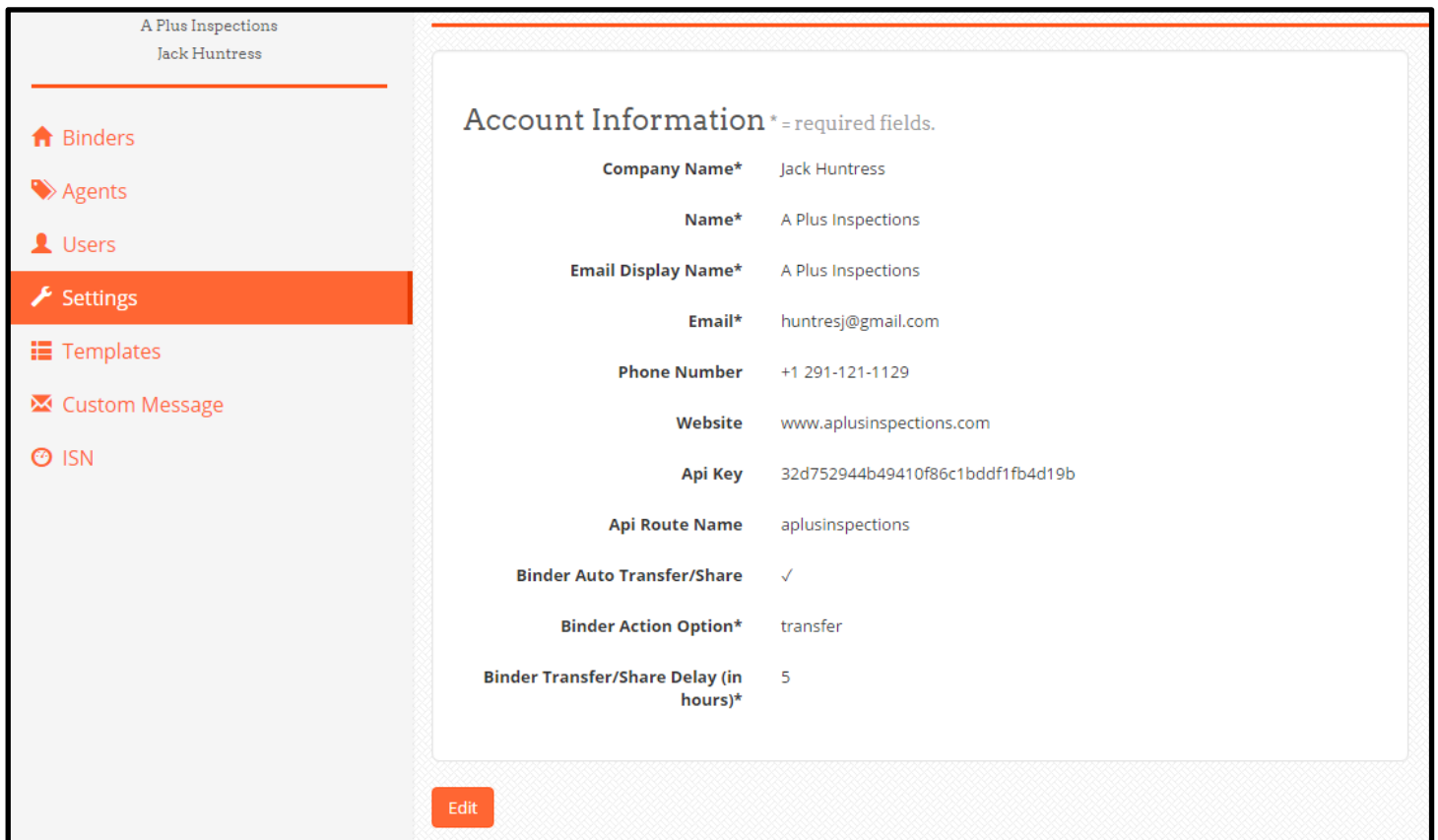
# STEP 1 - Get your API Key and API Route

NOTE: To create an account on HomeBinder, go to <https://www.homebinder.com/inspectors> and click on Start Free Trial

After your account is created on HomeBinder, go to the Settings page and get your API Key and API Route Name. If these do not exist under your account, click Edit, then click Generate API Key and then choose (type in) an API Route Name. We recommend you make the route name a combination of your first and last name (no spaces, dashes, period or other characters).

Examples for API Route Name: John Smith → *johnsmith*

A-Plus Inspections → *aplusinspections*



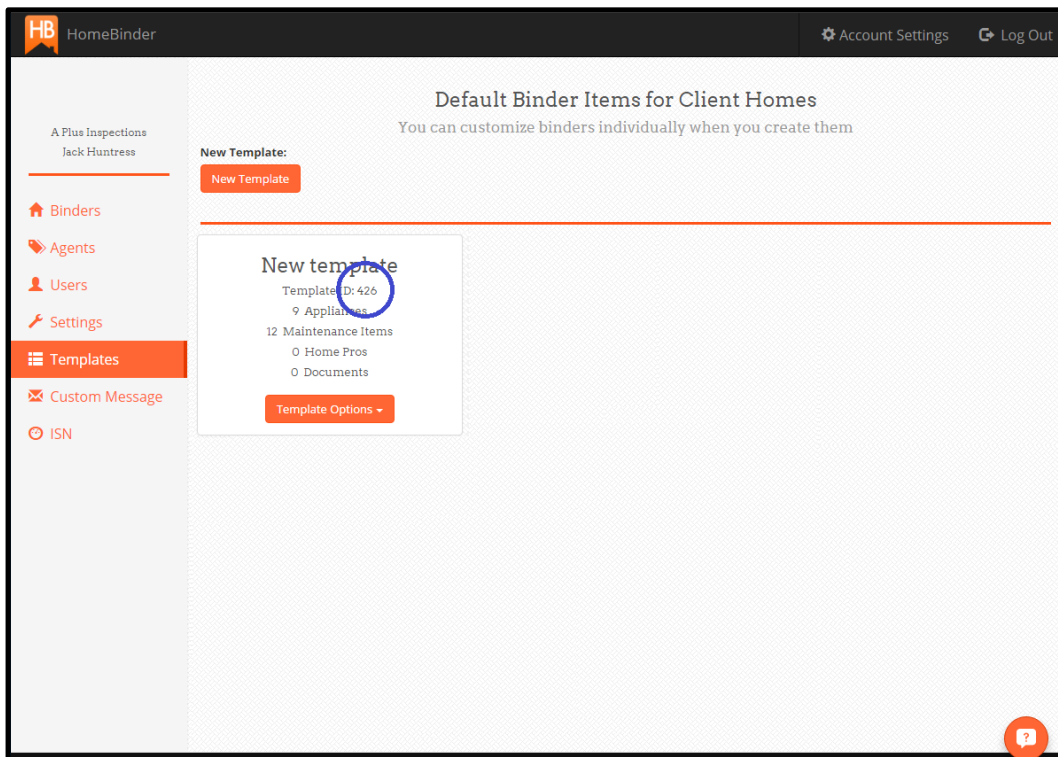
The screenshot shows the 'Settings' page for 'A Plus Inspections' by Jack Huntress. The left sidebar contains navigation options: Binders, Agents, Users, Settings (highlighted), Templates, Custom Message, and ISN. The main content area is titled 'Account Information \* = required fields.' and displays the following details:

Company Name*	Jack Huntress
Name*	A Plus Inspections
Email Display Name*	A Plus Inspections
Email*	huntresj@gmail.com
Phone Number	+1 291-121-1129
Website	www.aplusinspections.com
Api Key	32d752944b49410f86c1bddf1fb4d19b
Api Route Name	aplusinspections
Binder Auto Transfer/Share	✓
Binder Action Option*	transfer
Binder Transfer/Share Delay (in hours)*	5

An 'Edit' button is located at the bottom right of the settings card.

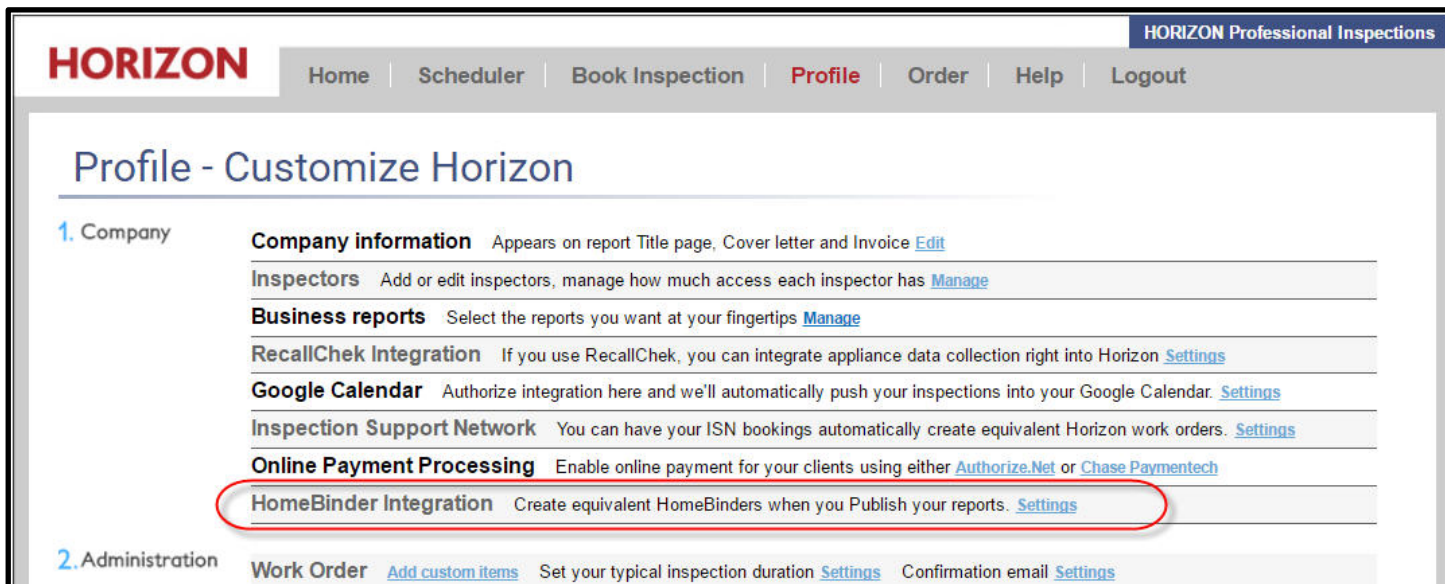
## STEP 2 - Get your Template ID

Next, get your Template ID. This can be found under Templates in the menu on the left. See the blue circle for where the Template ID can be found. Most new inspector accounts will only have one template and although an inspector can have many templates, at this point, the integration between the systems restricts the user to only use only one template at any given point in time. (although it can be changed to another template at any time.)



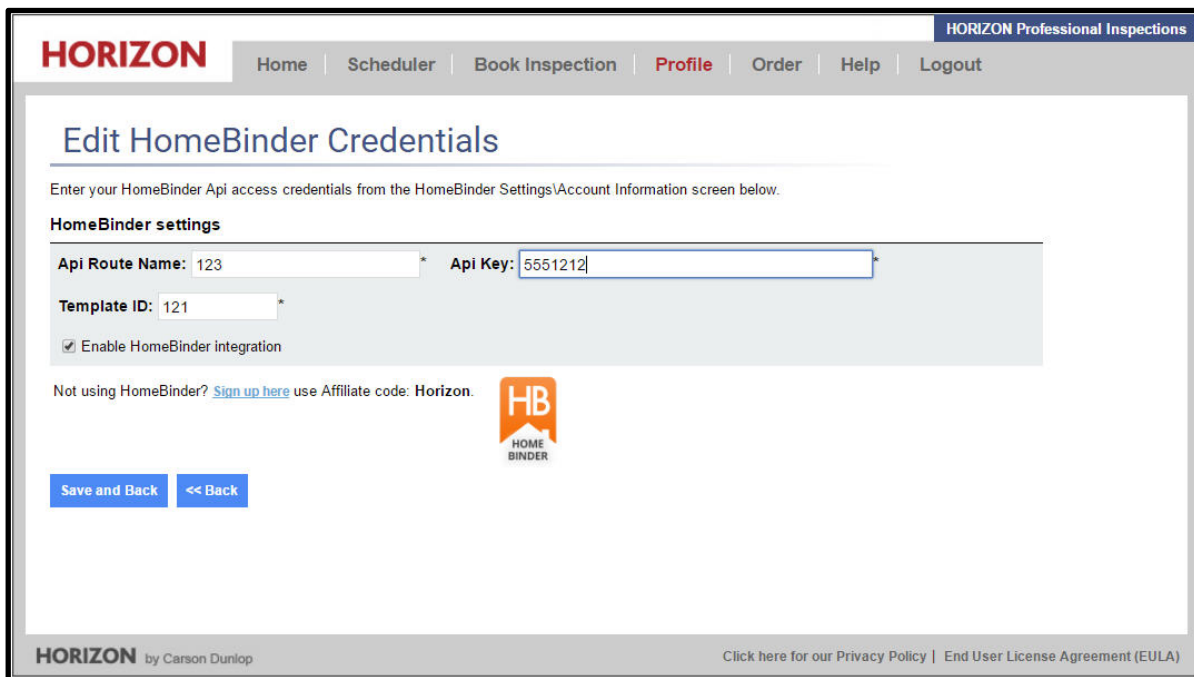
## STEP 3 - Input Parameters in Horizon

With these three parameters in hand (**API Key**, **API Route Name**, **Template ID**), navigate to your Profile in Horizon and click on Settings next to “HomeBinder Integration”



The screenshot shows the Horizon Professional Inspections interface. The navigation bar includes Home, Scheduler, Book Inspection, Profile, Order, Help, and Logout. The main heading is "Profile - Customize Horizon". Under the "1. Company" section, several settings are listed: Company information, Inspectors, Business reports, RecallChek Integration, Google Calendar, Inspection Support Network, Online Payment Processing, and HomeBinder Integration. The HomeBinder Integration setting is circled in red, showing the text "HomeBinder Integration Create equivalent HomeBinders when you Publish your reports. Settings".

And input them in screen shown



The screenshot shows the "Edit HomeBinder Credentials" form in the Horizon Professional Inspections interface. The navigation bar includes Home, Scheduler, Book Inspection, Profile, Order, Help, and Logout. The main heading is "Edit HomeBinder Credentials". Below the heading, there is a note: "Enter your HomeBinder Api access credentials from the HomeBinder Settings\Account Information screen below." The form contains the following fields and options:

- HomeBinder settings
- Api Route Name: 123 \*
- Api Key: 5551212 \*
- Template ID: 121 \*
- Enable HomeBinder integration

Below the form, there is a link: "Not using HomeBinder? [Sign up here](#) use Affiliate code: Horizon." and the HomeBinder logo (HB HOME BINDER). At the bottom of the form, there are two buttons: "Save and Back" and "<< Back".

At the bottom of the page, there is a footer: "HORIZON by Carson Dunlop" and "Click here for our Privacy Policy | End User License Agreement (EULA)".

Make sure you have clicked “**Enable HomeBinder Integration**” before clicking Save and Back

## STEP 5 - Create your first Binder

Now that the integration is complete, you will see a button on the Report Publishing page that will allow you to “Create HomeBinder” with one click at the completion of each inspection.

NOTE: You will get a confirmation message letting you know that the binder was successfully created.

**HORIZON** HORIZON Professional Inspections


Home | Scheduler | Book Inspection | Profile | Order | Help | Logout

### Report Publishing

2 Silverbirtch 12/13/2016 10:00 AM

**Title Page Photo** **Illustrations** **The Cover Letter** **The Summary/Bottom Line** **The Appendix**

**Add/Edit** **Edit Illustrations** **Edit Cover Letter** **Edit Summary** **Edit Appendix**

 Create a HomeBinder for this client. **Create HomeBinder**

**Step 1:** Check the boxes below to customize your reports. Settings will be saved for you. Note: Selecting Show Summary Section of Report Only takes priority over other settings.

- Include Title Page  Include Cover Letter  Include Invoice  Include Contract  Include Reference Library links
- Include Illustrations and Photos  Include Hyperlinks to More Info  Include Implications
- Include Summary/Bottom Line  Show Summary/Bottom Line Section of Report **Only**  Repeat Images in Summary/Bottom Line
- Include Recommendations Only

**Step 2: Detail (optional):** Name this version of the report.

**Preview**

**Step 3: Generate.** (Posts a finished version of report on web)

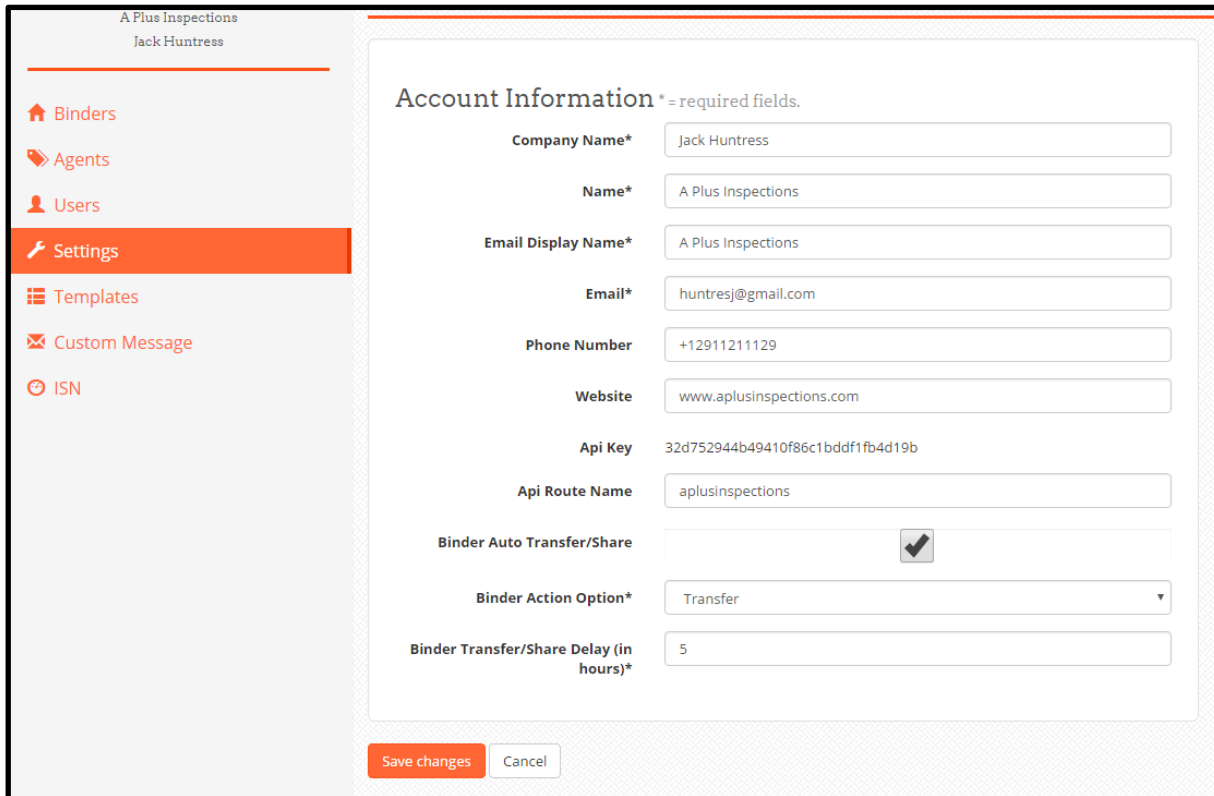
**Generate** or **Complete** (no report will be generated, but the inspection will be marked 'Complete')

## STEP 6 - Automate the Transfer Process

With Steps 1-5 completed, the process of creating binders is automated. In this last step, you'll be automating the process of handing the binders off to your clients. As you'll see below, a time delay can be put in place so that binders can be modified by logging into HomeBinder after pressing the button in Horizon on a case-by-case basis if desired.

Login to HomeBinder and click on the Settings in your menu, then click on Edit.

The screen will look as below:



The screenshot shows the 'Account Information' settings page. The left sidebar contains a menu with options: Binders, Agents, Users, Settings (highlighted), Templates, Custom Message, and ISN. The main content area is titled 'Account Information \* = required fields.' and contains the following fields:

Company Name*	Jack Huntress
Name*	A Plus Inspections
Email Display Name*	A Plus Inspections
Email*	huntresj@gmail.com
Phone Number	+12911211129
Website	www.aplusinspections.com
Api Key	32d752944b49410f86c1bddf1fb4d19b
Api Route Name	apulusinspections
Binder Auto Transfer/Share	<input checked="" type="checkbox"/>
Binder Action Option*	Transfer
Binder Transfer/Share Delay (in hours)*	5

At the bottom of the form are two buttons: 'Save changes' and 'Cancel'.

The bottom three settings are used for this purpose.

**Binder Auto Transfer/Share:** This activates the system to automatically Transfer (or Share - not typically used) binders to clients. **CHECK THIS BOX** and confirm on the screen that comes up.

**Binder Action Option:** This should be set to **Transfer**. (In some limited cases it may make sense to Share with clients but we recommend you connect with a HomeBinder representative to discuss this.)

**Binder Transfer/Share Delay (in hours):** The number of hours that the binder will stay in your account on HomeBinder before an email is sent to the client and they now have access to the binder. You can use this in cases where you want to manually modify or edit binders before they are sent to your client. Generally inspectors put this window somewhere between 4 and 24 hours. **NOTE: THE MINIMUM IS 1 HOUR.**

## STEP 7 (Optional) – Setting up Previous Clients

After initially signing up, many inspectors set up previous clients from the last few months since those clients have most recently closed on their homes.

To do this, simply navigate to the report, go to the delivery screen and click the “Create HomeBinder” button just as you would with any other inspection.