# Encompass Next Gen Feature and Configuration Guide

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TOTAL EXPERT

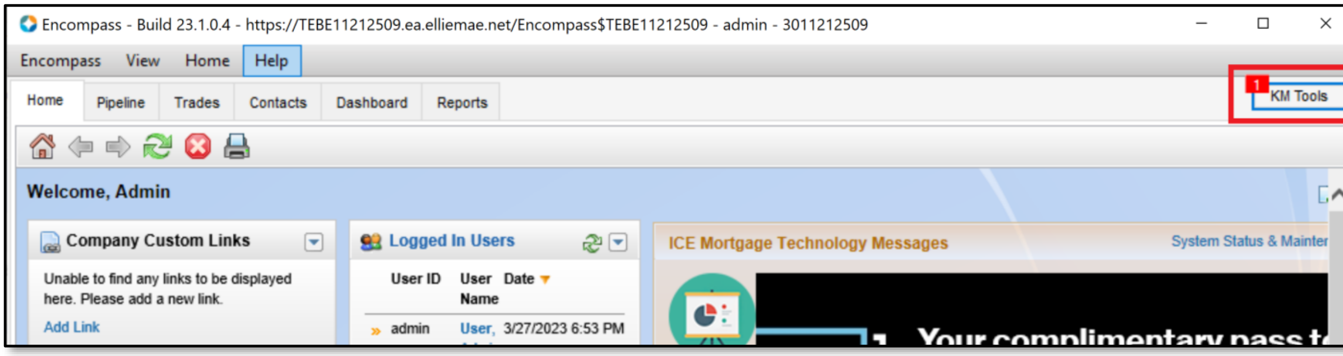
# Introduction

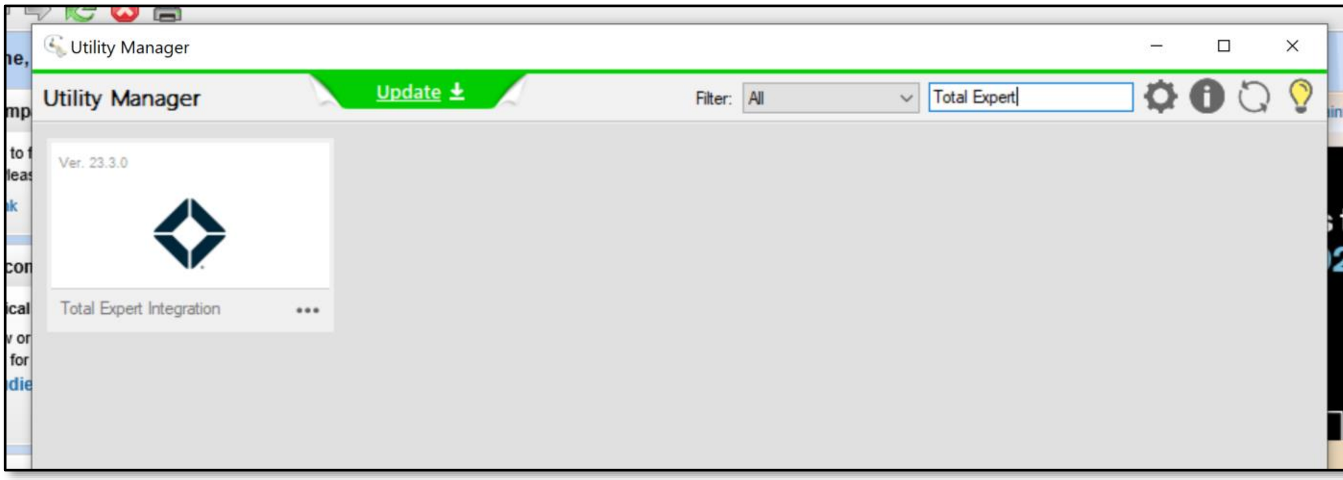
This document serves as the configuration guide for the Total Expert utility available in KM Tools for the integration to Encompass. An Encompass administrator or a user with the appropriate permissions will be able to complete each of the following installation and configuration tasks.

The first section covers the initial Encompass configuration for the Total Expert utility. The next section outlines configuration of the data mapping between Total Expert and Encompass. Finally, this guide will walk you through the Total Expert troubleshooting tools as part of the utility.

This guide is meant to walk an Encompass Admin through configuring your organization in a SmartClient desktop environment and the KM Tool interface. KensieMae can activate access to the KM Tool in your instance of Encompass.

Throughout this guide, you will be instructed to navigate through the Total Expert KM Utility. To do so, you will need to click the **KM Tools** button in the upper-right corner. Once in KM Tools, you can use the search box to find and navigate to the Total Expert utility.




# Installation and Important Features

## Installing the Total Expert Utility

Before using the Total Expert next gen utility, It must be added to your KM Tool offering by Kensie Mae. This requires a 30-minute phone conversation with Kensie Mae and your Encompass administration team. Before the call, Kensie Mae requires:

- lender name
- lender corporate address
- Encompass production CID
- Encompass test CID
- main contact name
- main contact email
- main contact phone number

## Push to Encompass

To leverage the Push to Encompass feature, Total Expert must have the `x-km-api-key` from Kensie Mae to configure your outbound data connector. In addition, Kensie Mae requires ICE API credentials to create the loan file in your instance of Encompass. Your representative at Kensie Mae will assist you with both activities.

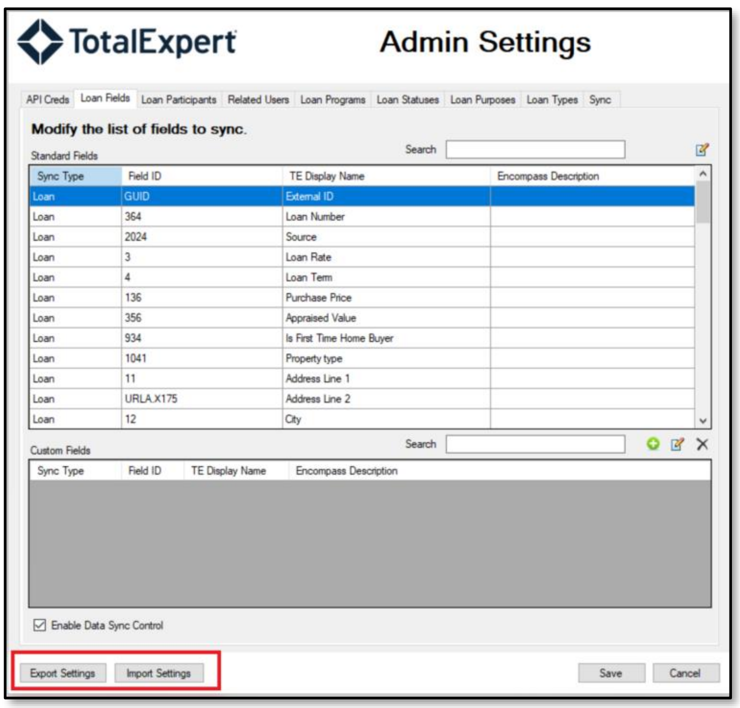
**Note**

This is not required if you do not want to use the Push to Encompass feature.

## Import and Export Settings

As part of the package, you can export your Total Expert utility configuration and save it to your desktop or some other secure location. You can also import those settings. This enables you to accomplish a few things:

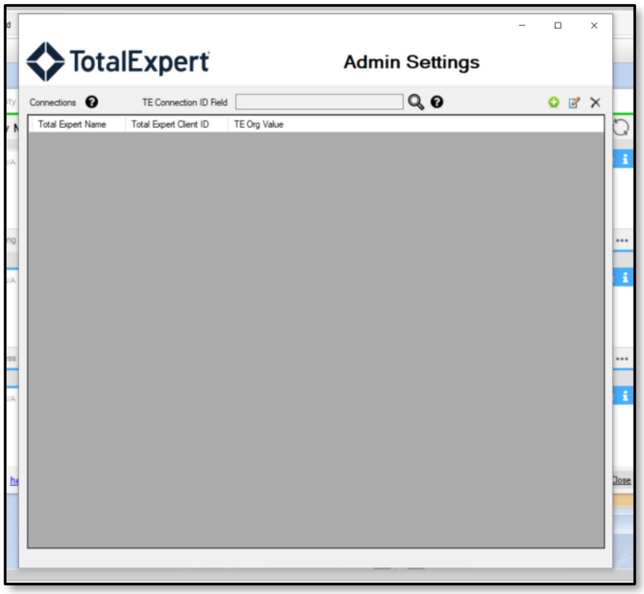
- Version control: When making changes to your configuration, by exporting the setting before you start, you will have a previous version you can import if you would like to revert your changes.
- Total Expert Support: If there are issues with your settings that require you to contact Total Expert support, you can export your settings and provide them to Total Expert. Once received, Total Expert can import these settings into their instance of Encompass to troubleshoot.
- Environment promotion: You can complete all of the configuration in your development or sandbox environments of Encompass (TE environment). Once completed, you can export these settings from your lower environment, and import them into production.




## Connections

The utility allows you to configure multiple different connections to Total Expert. This enables you to sync Encompass data to multiple instances of Total Expert, configure different mapping for different loan folders and more. You will be prompted to create a connection when first accessing the utility.

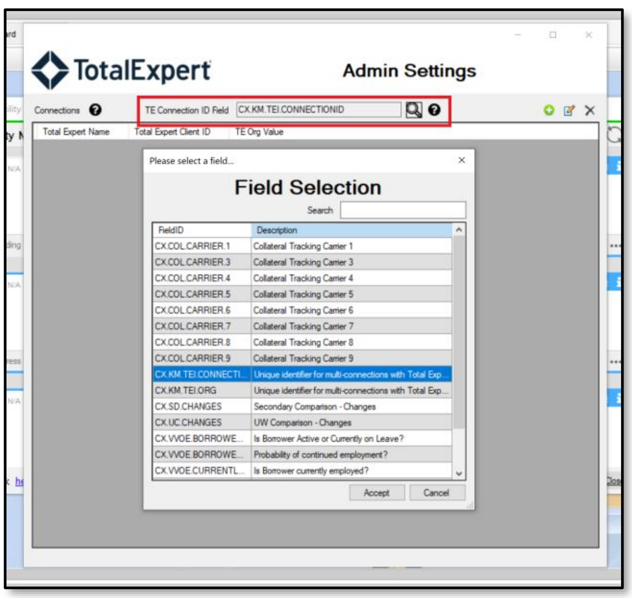
After you have created a connection, you can access the utility to create new connections or edit or delete existing connections.




*Connection ID Field*

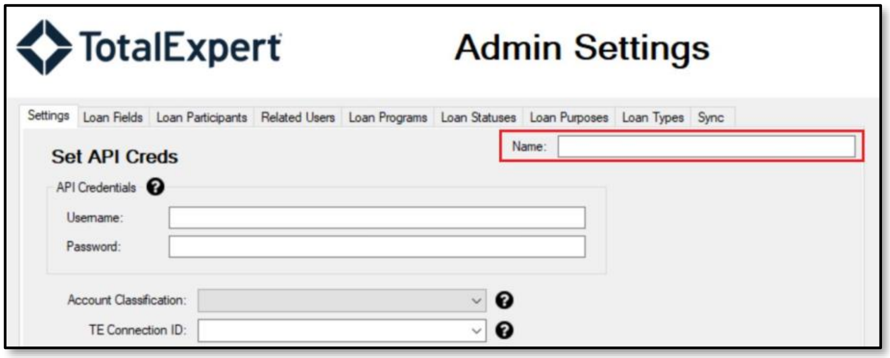
If you are configuring multiple connections, select the Encompass field you want to use to provide the utility and identifier of which connection to use for a specific loan file when it is saved.

You can only select fields that have a DROPDOWN format.




*Connection Name and ID*

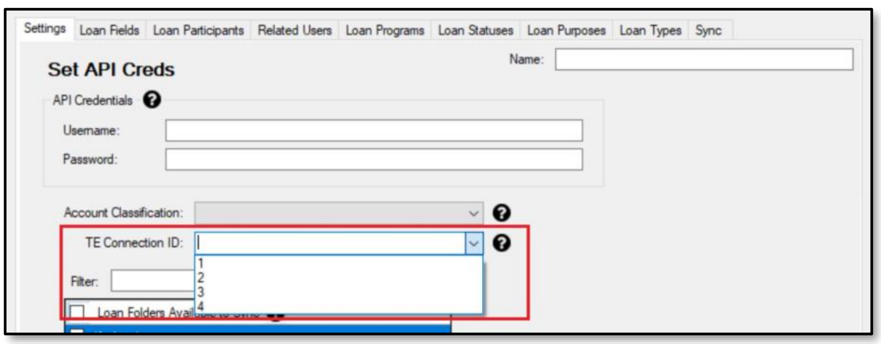
As you complete your connection settings, give your connection a name so you can easily identify its purpose. This name will be visible throughout the rest of the configuration and on the Connections screen.

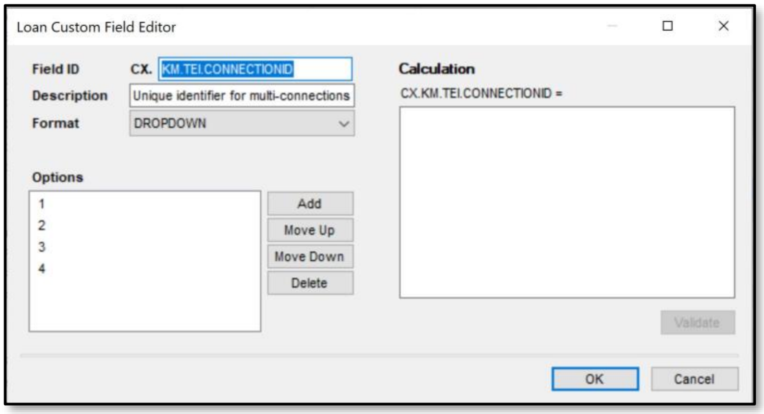



The TE Connection ID enables you to instruct the utility which connection to use for a specific loan file when it is saved. The available options are those of the Encompass Field configured in the TE Connection ID Field in the previous step.

If you require multiple connections, be sure to configure a TE Connection ID for each. If you have multiple connections but no Connection ID selected, you will be prompted to add one.

Once the connections are configured, any loan files that are saved with a connection specified will be synced with Total Expert based upon that connection's field mappings, username, and password.



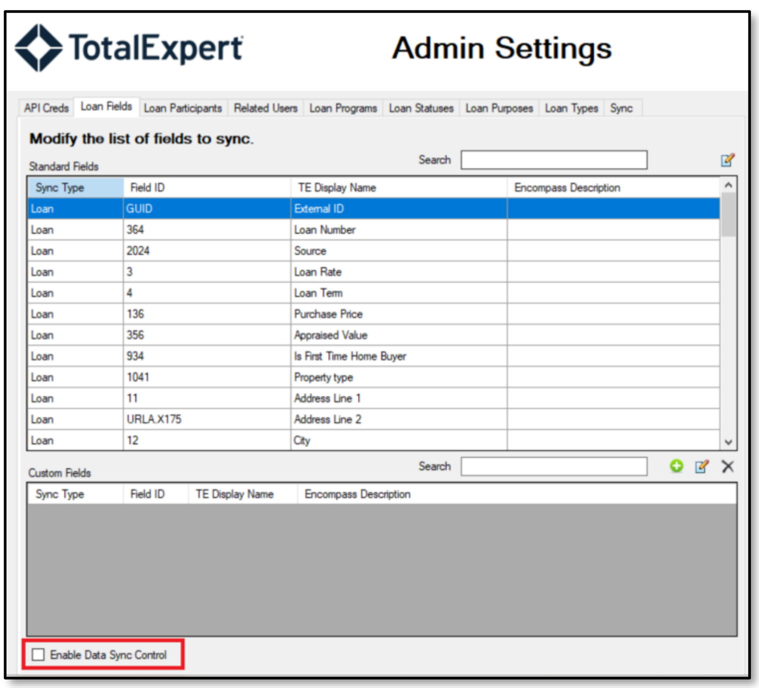

## Data Sync Control

In the field mapping configuration for a loan and its correlating participants, you have the option to leverage Data Sync Control. This functionality gives you control around what loan files are sent to Total Expert, and when. In addition, you can determine which loan participants are included with that loan file, and when.

This is controlled by using a custom field for the loan file that is created with the installation of the Total Expert utility, as well as other custom fields that you create, as participants might be unique to your instance. The custom field that is created as part of the utility is called `CX.KM.TEI.SYNCLOANWITHTE`.

### *Loan File Data Sync Control*

In the loan fields mapping screen, you can select the **Enable Data Sync Control** option.

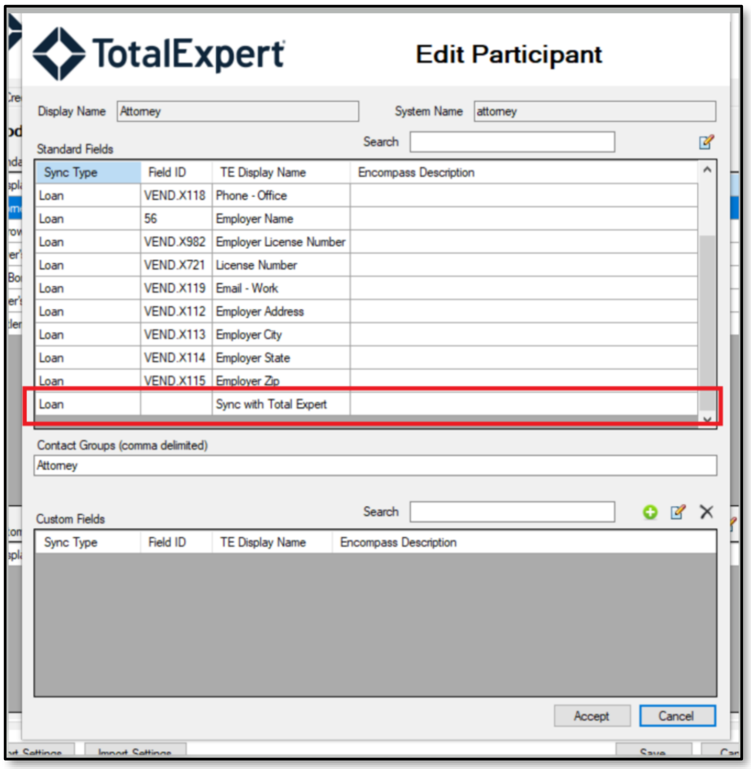



By selecting this option, the system only attempts to send loan files with the field `CX.KM.TEI.SYNCLOANWITHTE` checked (true) to Total Expert when they are committed or saved. If this option is not selected, every loan file will attempt to sync with Total Expert.

You can configure business rules in Encompass to determine when that box is checked, such as for certain loan files, users, and more. For more details on Encompass business rules, consult with your representative at ICE or see the Encompass documentation HERE.

### *Loan Participant Data Sync Control*

In the loan participant fields mapping screen, you can map any Encompass field to a value called **Sync with Total Expert**. That field must be a check box format field in Encompass. This is NOT an option for the borrower loan participant, as borrower is required. However, any other participant, including custom participants, includes this mapping.



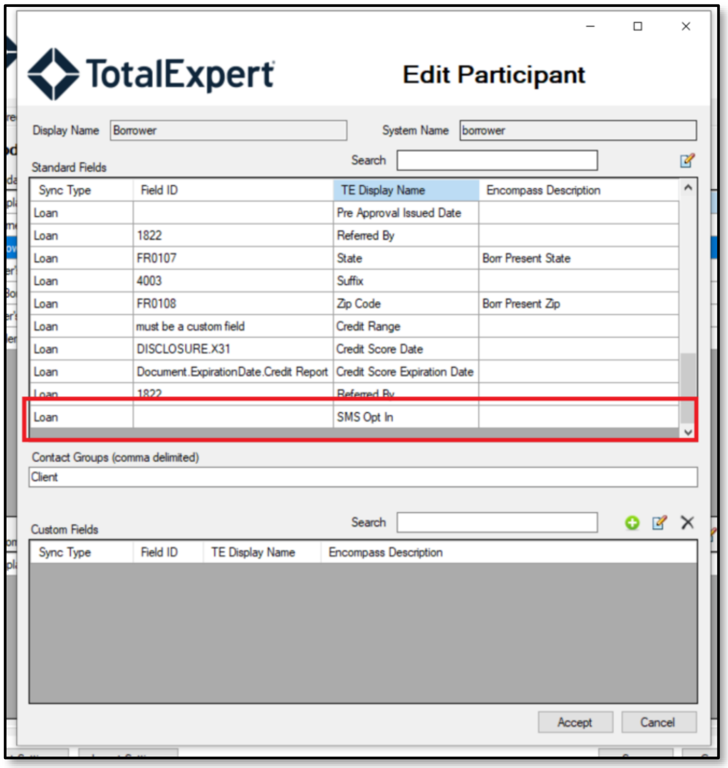

By mapping this field, the system only attempts to send the correlating loan participant with the rest of the loan file when that field is checked (true). If the mapping is not completed, every loan file sync will attempt to sync the participant.

You will likely create a custom field for every available loan participant to map to this setting. That custom field must have a checkbox format. You can configure business rules in Encompass to determine when that box is checked, such as for certain loan files, users, and more. For more details on Encompass custom fields and business rules, consult with your representative at ICE or see the Encompass documentation HERE for custom fields and HERE for business rules.

## SMS Opt-In

In the field mapping configuration for the borrower participant, you have the option to provide previously received SMS opt-in information to Total Expert. Once this information is received, Total Expert will not request SMS opt-in when delivering SMS messages to the contact's cell phone number.

In the borrower loan participant field mapping screen, you can map any Encompass field to a value called **SMS Opt In**. That field must be a checkbox format field in Encompass. This is *not* an option for any other loan participant.




By mapping this field, when that field is checked (true) AND a cell phone value is present, an SMS opt-in will be created for that phone number for the relevant Total Expert user. If the mapping is not completed, no SMS opt-in will be attempted.

You will likely create a custom field to map to this setting. That custom field must have a checkbox format. You can configure business rules in Encompass to determine when that box is checked, such as for certain loan files, users, and more. For more details on Encompass custom fields and business rules, consult with your representative at ICE or see the Encompass documentation HERE for custom fields and HERE for business rules.

# Configuration

## Admin Settings – API Creds

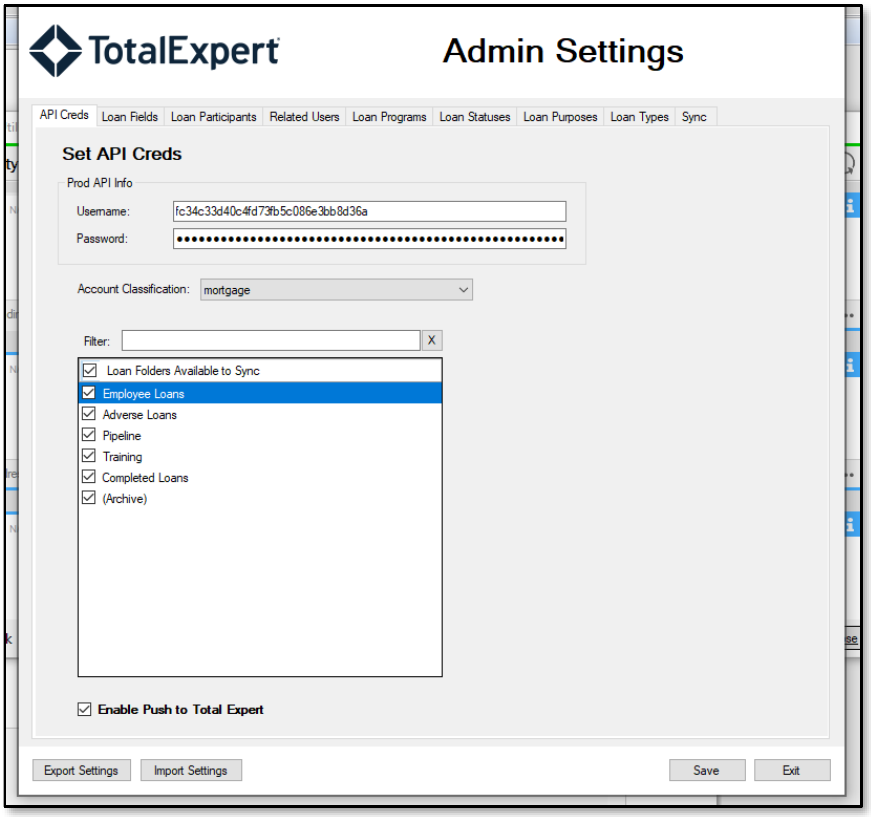
You have an area to configure API credentials to connect with your instance of Total Expert. Select the **API Creds** tab in the Admin Settings box. For the fields in the Set API Creds section, you need to retrieve the following information from your Total Expert representative:

- client ID – enter this in the **Username** field
- client secret – enter this in the **Password** field

Select the **Account Classification** to be used when syncing loan data to Total Expert. This is likely **mortgage** for your organization.

In the last scecion, select the loan folders in Encompass from which you want the utility to sync underlying loan files with Total Expert. By deselecting a loan folder, any loan file associated with that folder will not sync with Total Expert.

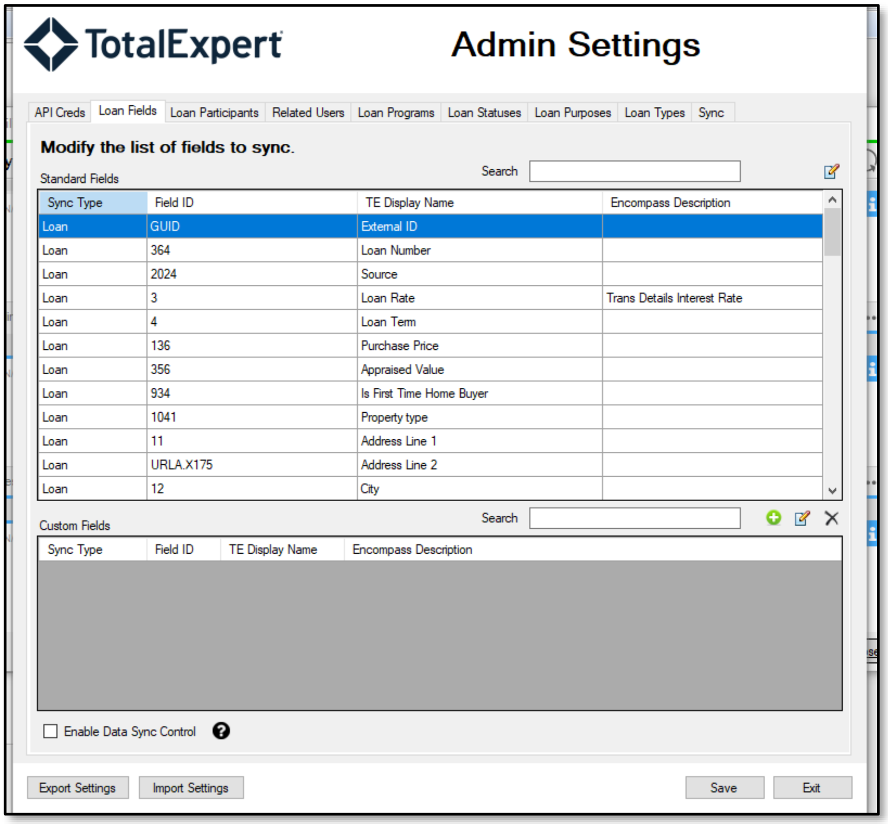
You can select whether syncing with Total Expert is enabled by selecting the **Enable Push to Total Expert** option. This serves as a master ‘on/off’ switch.




Once this is complete, click the **Loan Fields** tab to complete loan data mapping.

## Admin Settings – Loan Fields

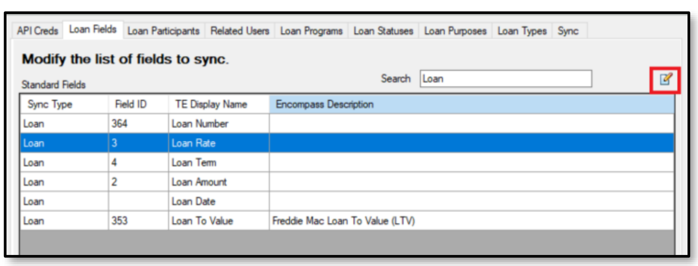
On the Loan Fields tab, you will determine which Encompass fields will populate which Total Expert fields. When the utility is installed, there are default Encompass field mappings completed. You should review these defaults to ensure the mapping meets your needs and workflow.




## *Standard Fields*

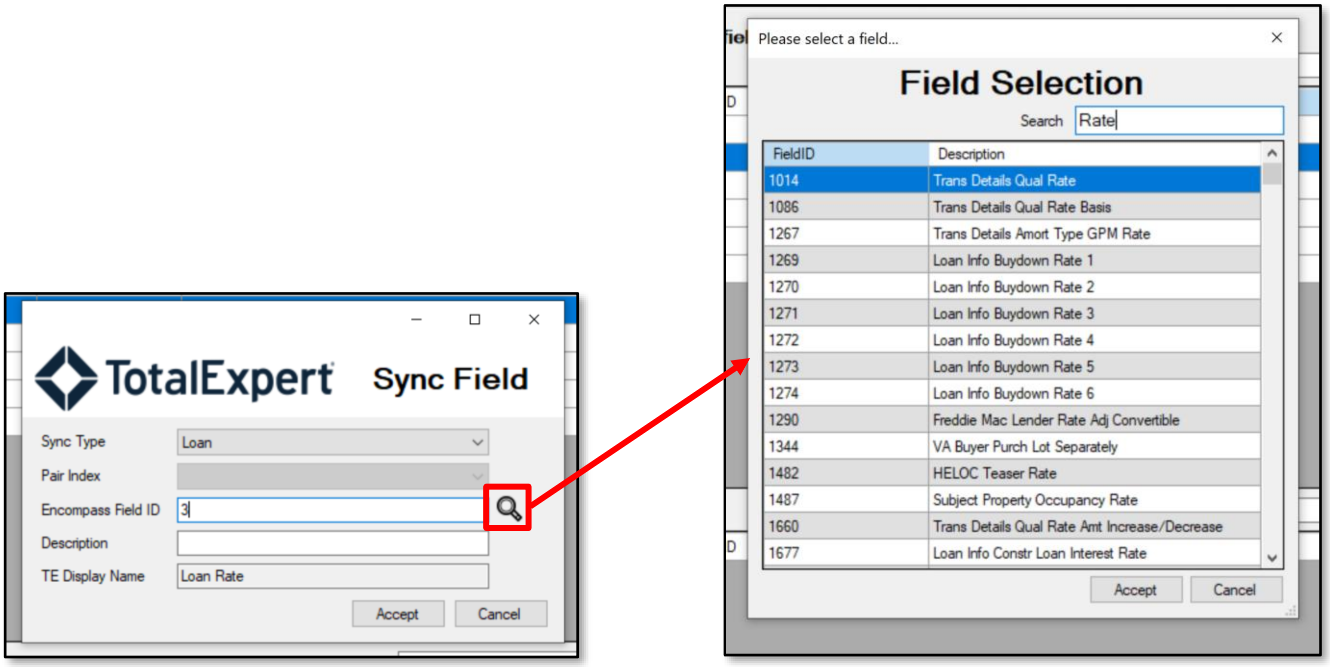
Standard field mapping uses the fields available to your instance of Total Expert by default. These include unique loan identifiers, loan scenario details, and important loan dates.

You can search for a field you want to update and then edit that field by double-clicking it or by clicking the **Edit** button:




This opens a pop-up box, where you have several options:

- **Pair Index** – By setting this, you can determine the specific borrower pair on the loan file that populates the value in Total Expert. This is only available when the Sync Type is Borrower or CoBorrower.
- **Encompass Field ID** – You can manually type the Field ID you want to use or click the **Search** button (magnifying glass icon) to search the Encompass Field library for the field you want.
- **Description** – Enter a description or use what is provided by Encompass.
- **TE Display Name** – This is not editable. It indicates the field in Total Expert that will receive this value.



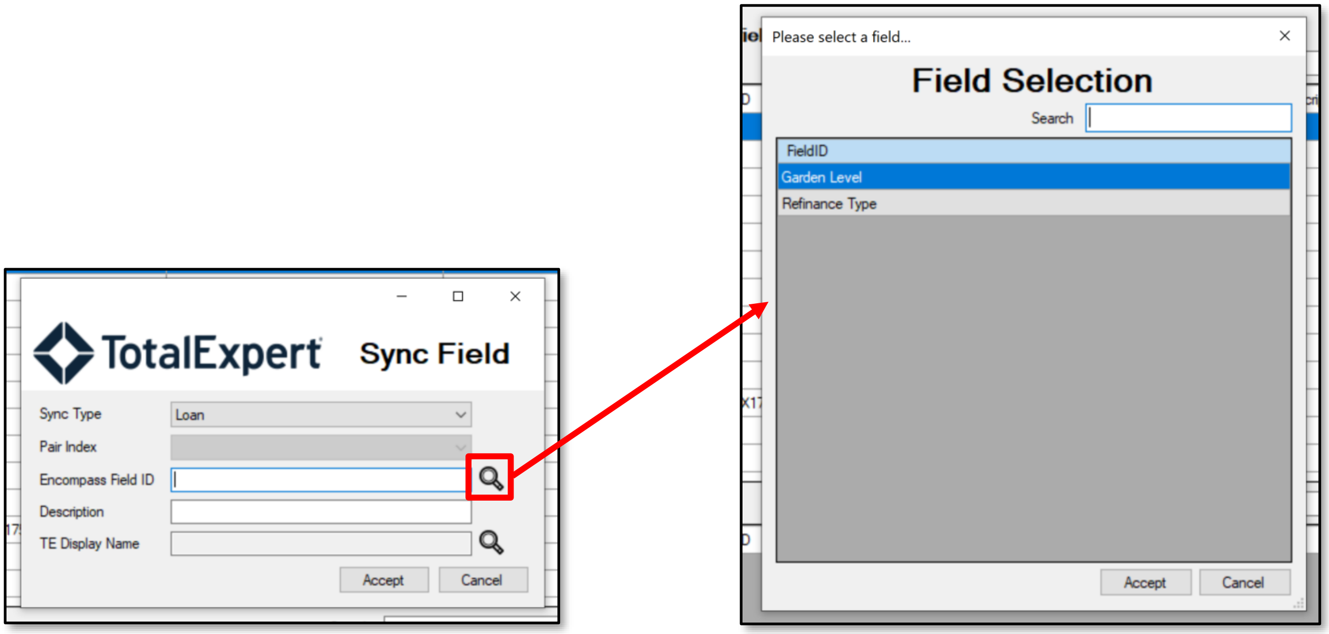

### *Custom Fields*

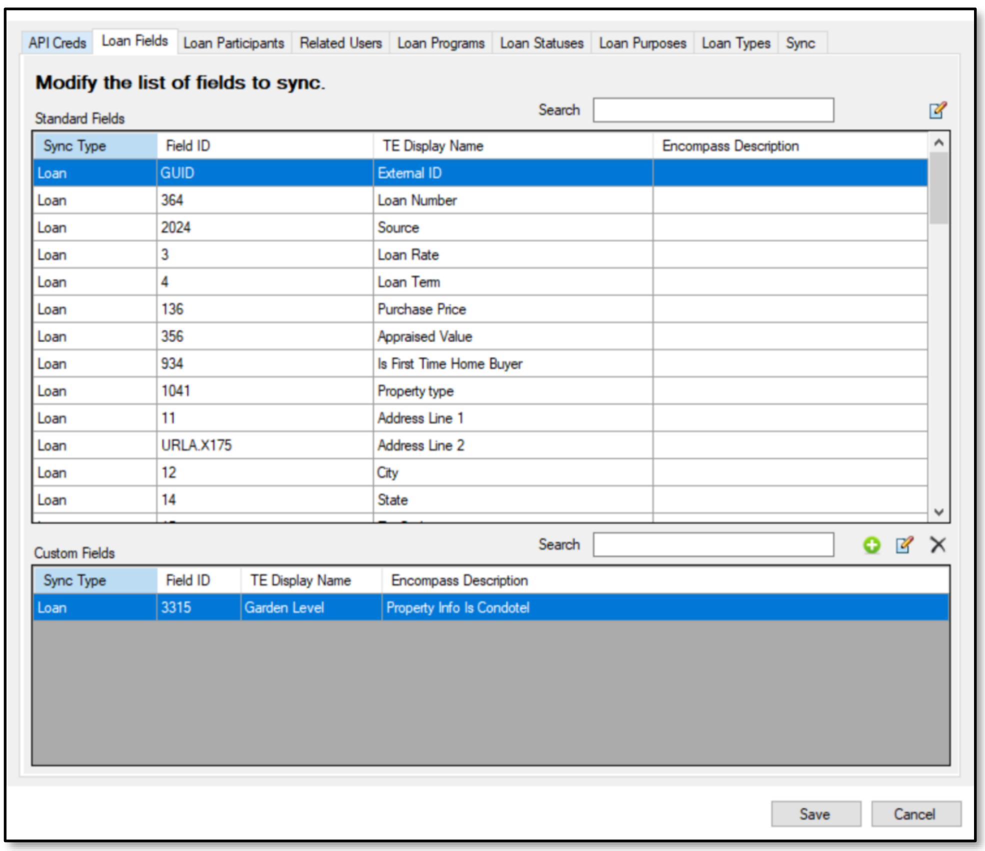
Custom field mapping uses the fields that are custom to your instance of Total Expert. Discuss with your Total Expert representative how to create and adjust these custom fields.

You can add new custom field mappings by clicking the **Add** button. Additionally, you can search for fields already mapped that you want to update and then edit that field by double-clicking it or by clicking the **Edit** button.


Clicking the Add button opens a pop-up box, where you have several options:

- **Pair Index** – By setting this, you can determine the specific borrower pair on the loan file that populates the value in Total Expert. This is only available when the Sync Type is Borrower or CoBorrower.
- **Encompass Field ID** – You can manually type the Field ID you want to use or click the **Search** button (magnifying glass icon) to search the Encompass Field library for the field you want, similar to mapping standard fields.
- **Description** – Enter a description or use what is provided by Encompass.
- **TE Display Name** – This field is editable, unlike standard mapping. Click the search icon to fetch all available loan-related custom fields from your instance of Total Expert.
    - Search for the desired custom field.
    - Select the field you want to use.

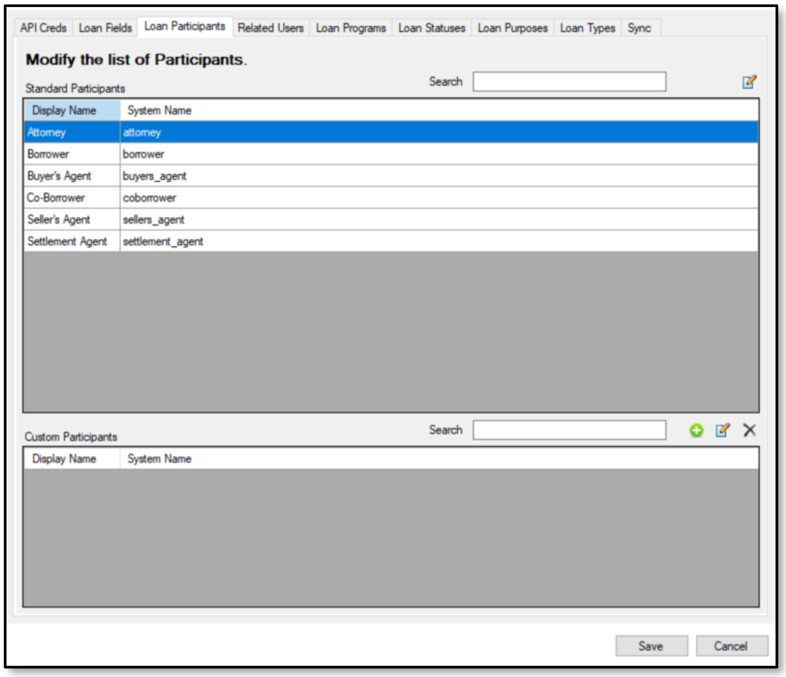



Once this is complete, click the **Loan Participants** tab.

# Admin Settings – Loan Participants and Participant Fields

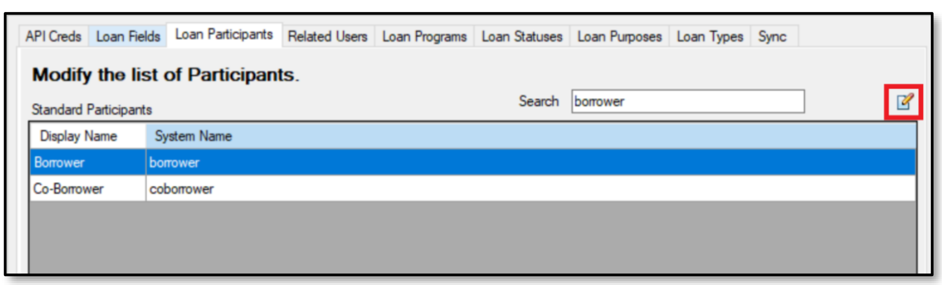
On the Loan Participants tab, you will determine which Encompass fields will populate which Total Expert fields. When the utility is installed, there are default Encompass field mappings completed. You should review these defaults to ensure the mapping meets your needs and workflow.



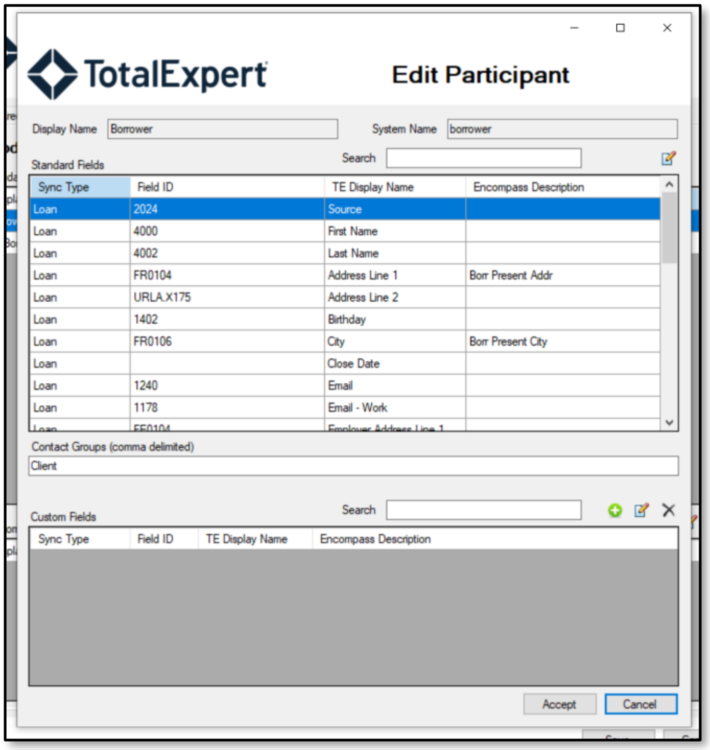

*Standard Participants*

Standard Participants mapping uses the participants available to your instance of Total Expert by default. These include borrower, co-borrower, and other professionals.

You can search for a participant you want to update and then edit that participant by double-clicking it or by clicking the **Edit** button.



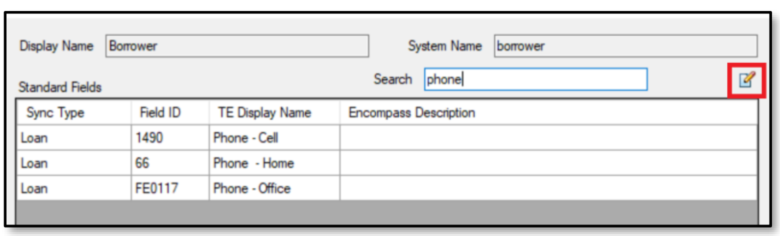

This opens a pop-up box, which has field mapping options similar to those for loan field mapping.




*Standard Fields*

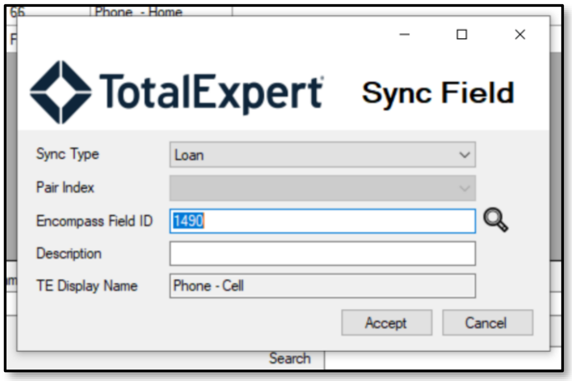
Standard field mapping uses the fields available to your instance of Total Expert by default. These include name, employer details, and contact information.

You can search for a field you want to update and then edit that field by double-clicking it or by clicking the **Edit** button.



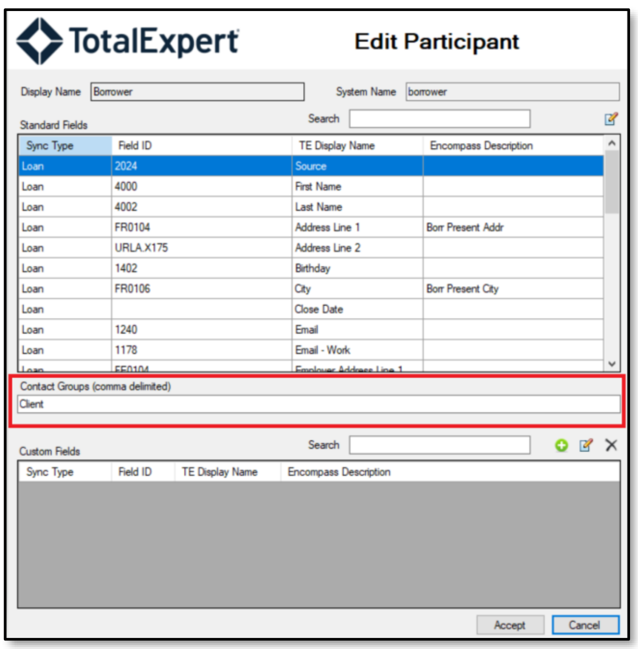

This opens a pop-up box, where you have several options:

- **Pair Index** – By setting this, you can determine the specific borrower pair on the loan file that populates the value in Total Expert. This is only available when the Sync Type is Borrower or CoBorrower.
- **Encompass Field ID** – You can manually type the Field ID you want to use, or search the Encompass Field library for the field you want, similar to Loan field mapping.
- **Description** – Enter a description or use what is provided by Encompass.
- **TE Display Name** – This is not editable. It indicates the field in Total Expert that will receive this value.




*Contact Groups*

On the participant field mapping screen, you can determine any contact groups you want to be added to the participant when it is created. You can then use contact groups to organize your contacts in Total Expert and trigger or route to specific journeys. You can add contact groups by including their names in the **Contact Groups** field.




Manually type in the contact group names you want to assign the contact to when they are synced from Encompass. If there are several contact groups, type them all in, separating each one from the next with a comma and a space (for example: Contact Group 1, Contact Group 2).

You can set contact groups for any participant, including custom participants.

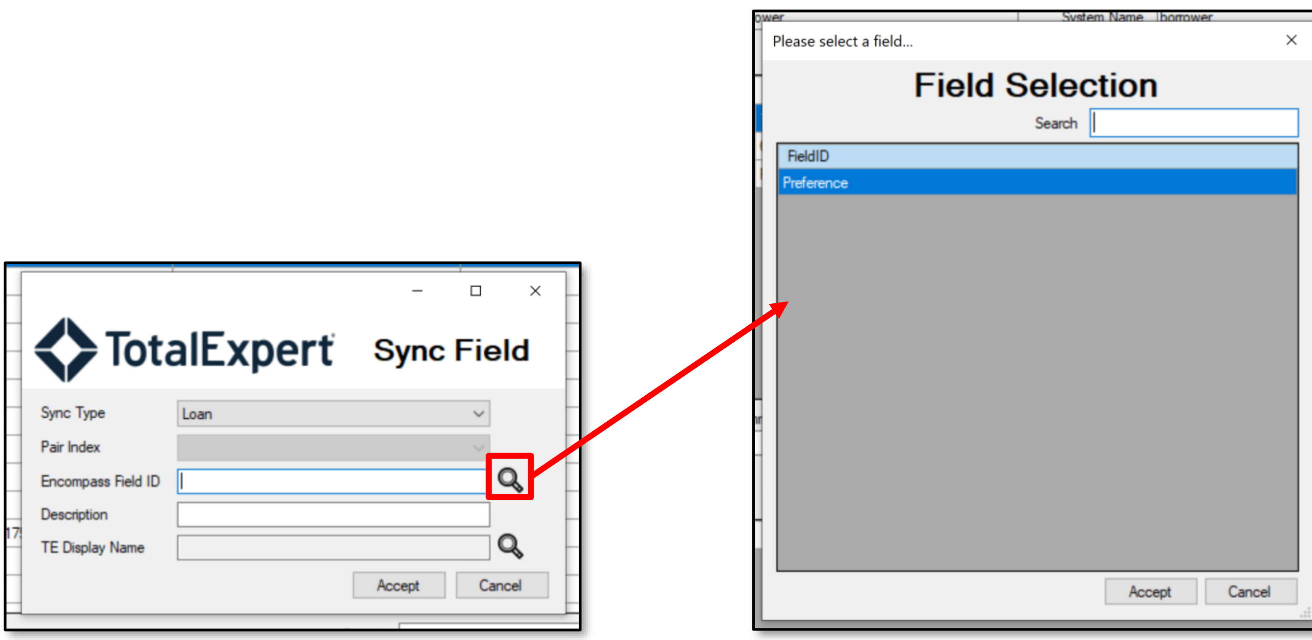
*Custom Fields*

Custom field mapping uses the fields that are custom to your instance of Total Expert. Discuss with your Total Expert representative how to create and adjust these custom fields.

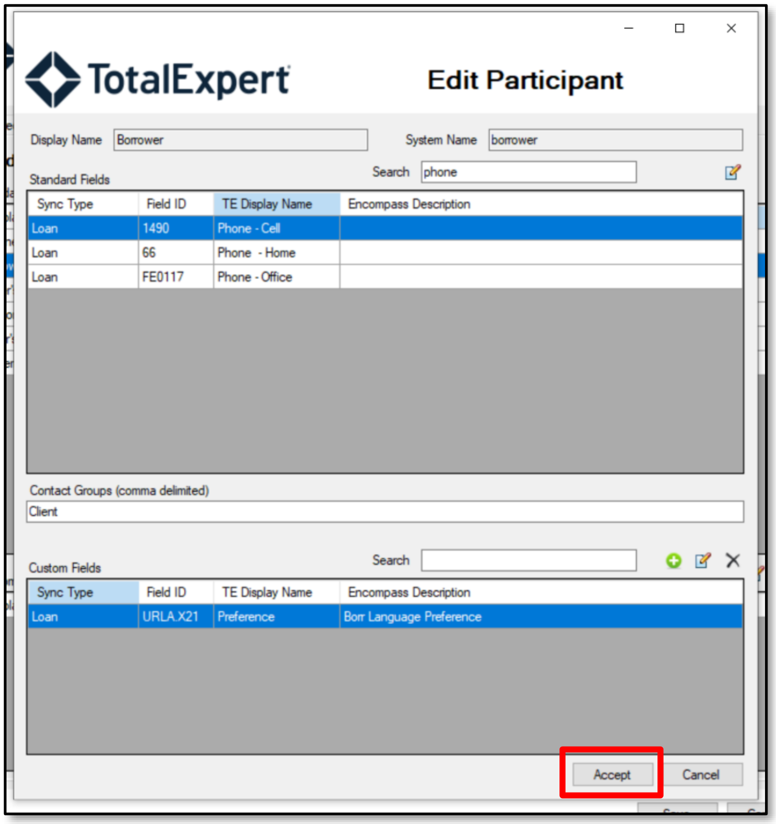
You can add new custom field mappings by clicking the **Add** button. Additionally, you can search for a field already mapped that you want to update and then edit that field by double-clicking it or by clicking the **Edit** button.


Clicking the Add button opens a pop-up box, where you have several options:

- **Pair Index** – By setting this, you can determine the specific borrower pair on the loan file that populates the value in Total Expert. This is only available when the Sync Type is Borrower or CoBorrower.
- **Encompass Field ID** – You can manually type the Field ID you want to use or click the **Search** button (magnifying glass icon) to search the Encompass Field library for the field you want, similar to mapping standard fields.
- **Description** – Enter a description or use what is provided by Encompass.
- **TE Display Name** – This field is editable, unlike standard mapping. Click the search icon to fetch all available loan-related custom fields from your instance of Total Expert.
    - Search for the desired custom field.
    - Select the field you want to use.




When this is complete, click the **Accept** button.

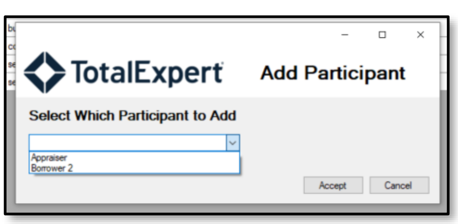



*Custom Participants*

Custom participants mapping uses the participants that are custom to your instance of Total Expert. Discuss with your Total Expert representative how to create and adjust these custom participants.

You can add new custom participant mappings by clicking the **Add** button. Additionally, you can search for a participant already mapped that you want to update and then edit that field by double-clicking it or by clicking the **Edit** button.


Clicking the Add button opens a pop-up box. Select the participant you want to include from the drop-down list.



Once you have selected the participant, complete the field mapping similar to standard participant mapping, including contact groups.

Once this is complete, click the **Related Users** tab.

### *Important Notes on Participants*

When syncing any participant with Total Expert, they must have a minimum of first name, last name, source, and one of the following:

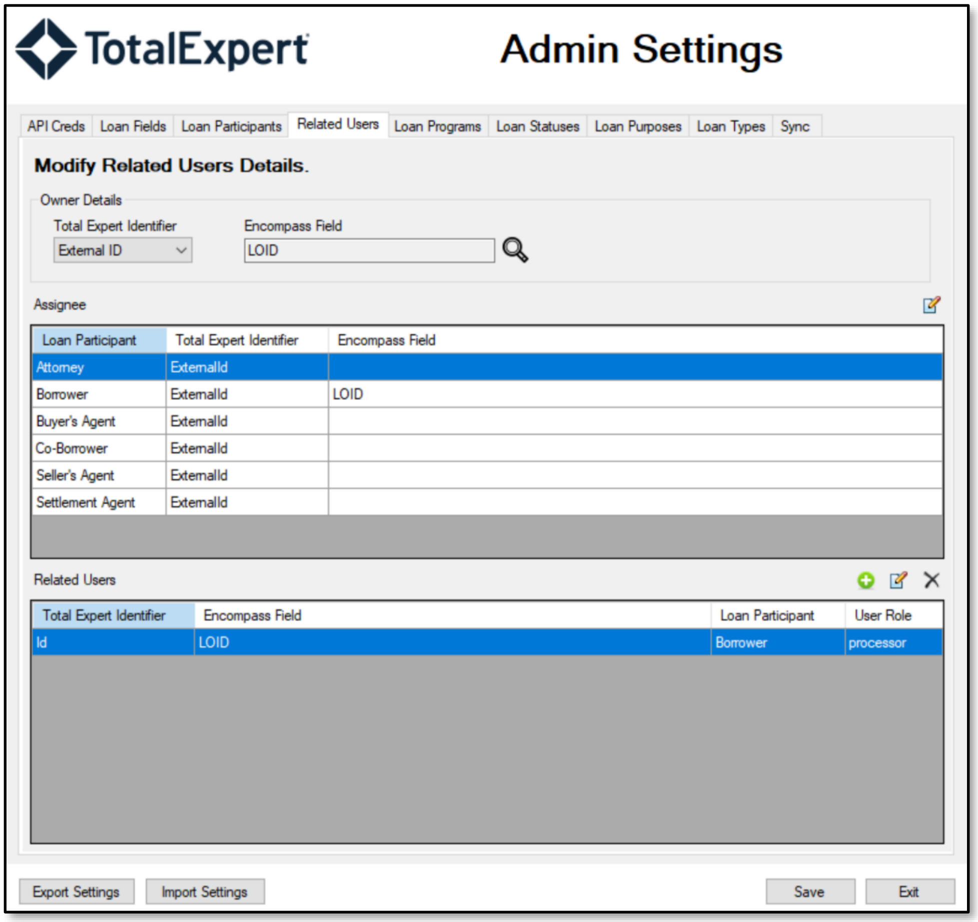
- email
- phone number (home, cell, or office)
- address (address, city, state, and ZIP code)

Only a borrower participant is required to successfully sync a loan with Total Expert. If any of the minimum required data is missing on the borrower, the loan file will not sync with Total Expert.

If any of the minimum required data is missing for other participants, but is available for the borrower, the loan file will sync with the borrower details but will skip any participants that have incomplete data.

## Admin Settings – Related Users

In this tab, you can control the loan owner and add assignees and related users to loan participants. This is completed by enabling the selection of the identifier and the correlating Encompass field.

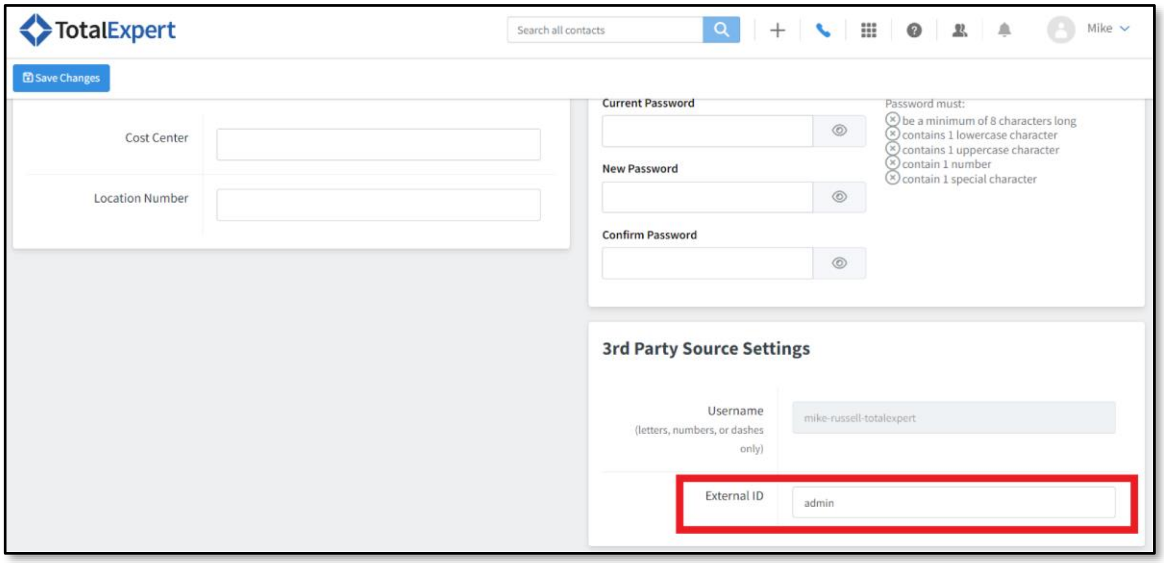



*Owner Details*

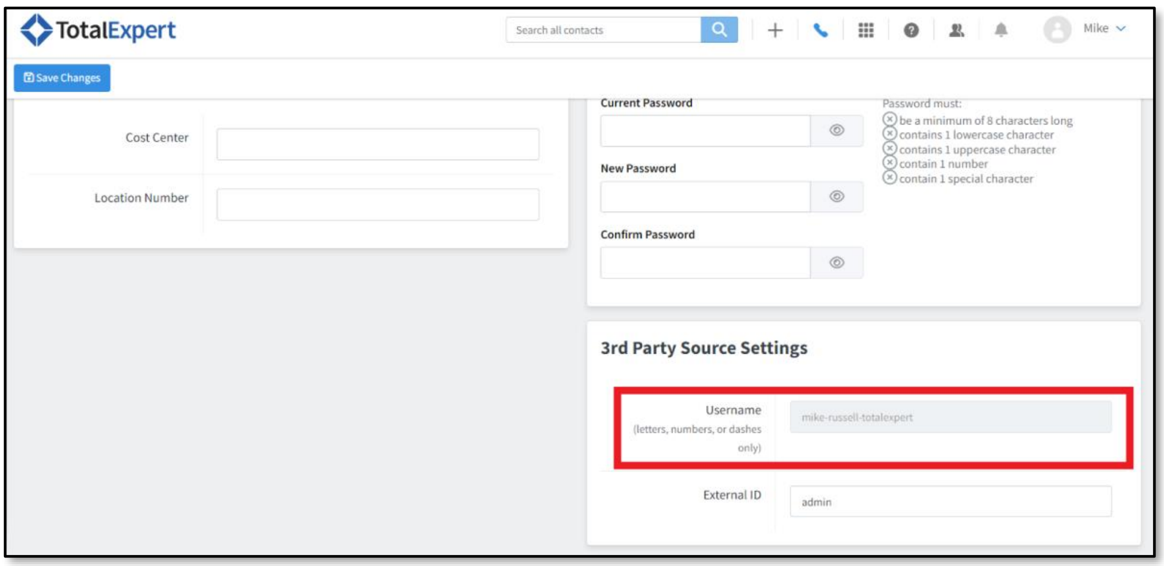
By default, the utility maps the Encompass LOID field to the External ID field in the Total Expert Identifier drop-down list. The other options in this list are Username and Email.

**Note**
Only one owner is allowed per loan file.

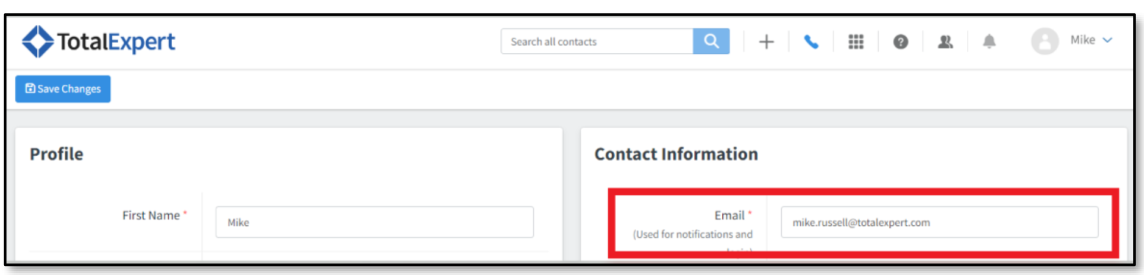
1. **External ID** – When this option is selected, the value of the Encompass field must match the value in the Total Expert user's External ID field.




2. **Username** – When this option is selected, the value of the Encompass field must match the Total Expert user's username.




3. **Email** – When this option is selected, the value of the Encompass field must match the Total Expert user's email address.



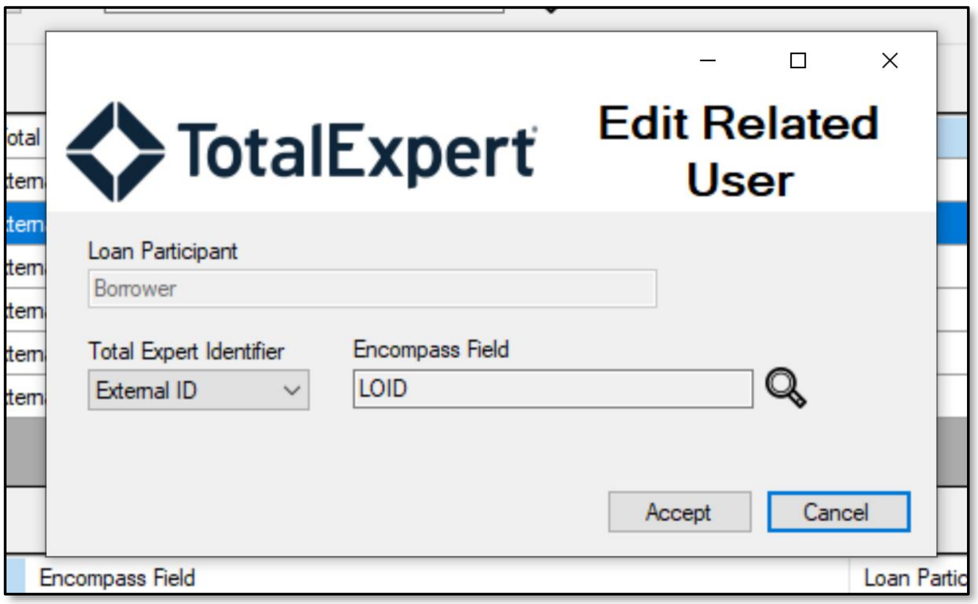

TOTAL EXPERT

*Assignee Details*

You can designate a Total Expert user for each of your loan participants to be assigned to. Only one assignee is allowed per loan participant.

A Total Expert assignee can view and edit the contact record. The assignee can also be used to deliver marketing automation (such as journeys) on behalf of the assignee, meaning the participant contact record might receive automated messaging from multiple users in Total Expert.

The Total Expert Identifier option includes External ID, Username, or Email and has the same requirements as described in the Owner Details. You also select the correlating Loan Participant who should be assigned to the Total Expert user.

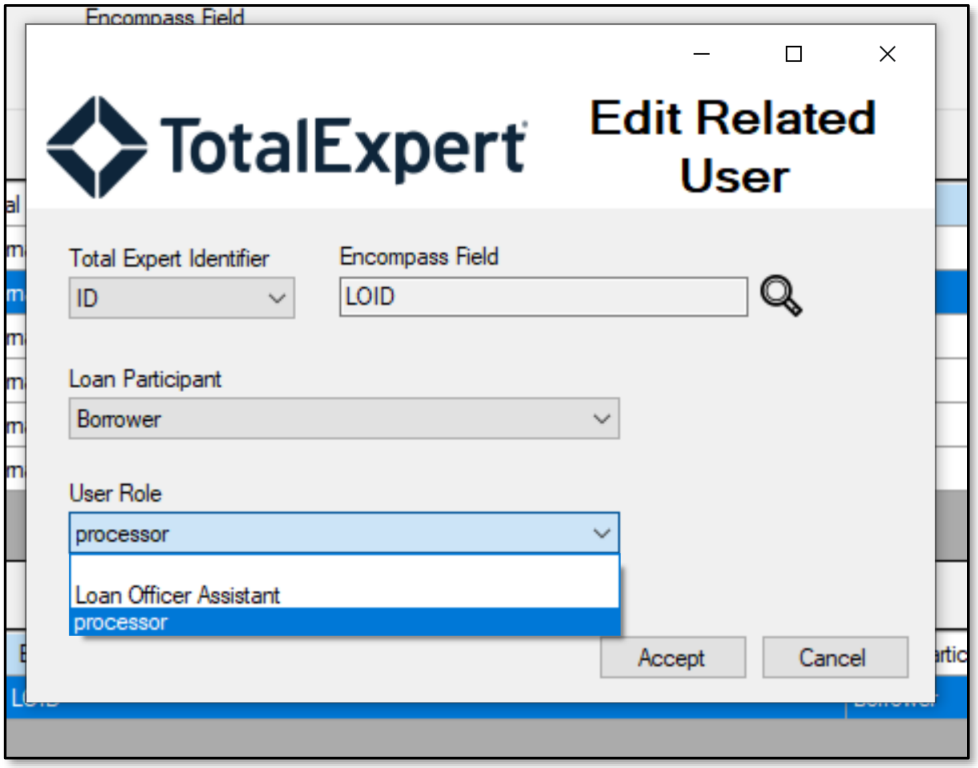



*Related Users Details*

You can designate related users in Total Expert for any of your loan participants. You can provide many related users for a single loan participant.

A Total Expert related user cannot view or edit the contact record unless it is also shared or assigned to that user. Creating a related user can trigger journey events and be used in marketing and workflow automation.

The Total Expert Identifier option includes External ID, Username, or Email and has the same requirements as described in the Owner Details. You also select the correlating Loan Participant and User Role for the related user.



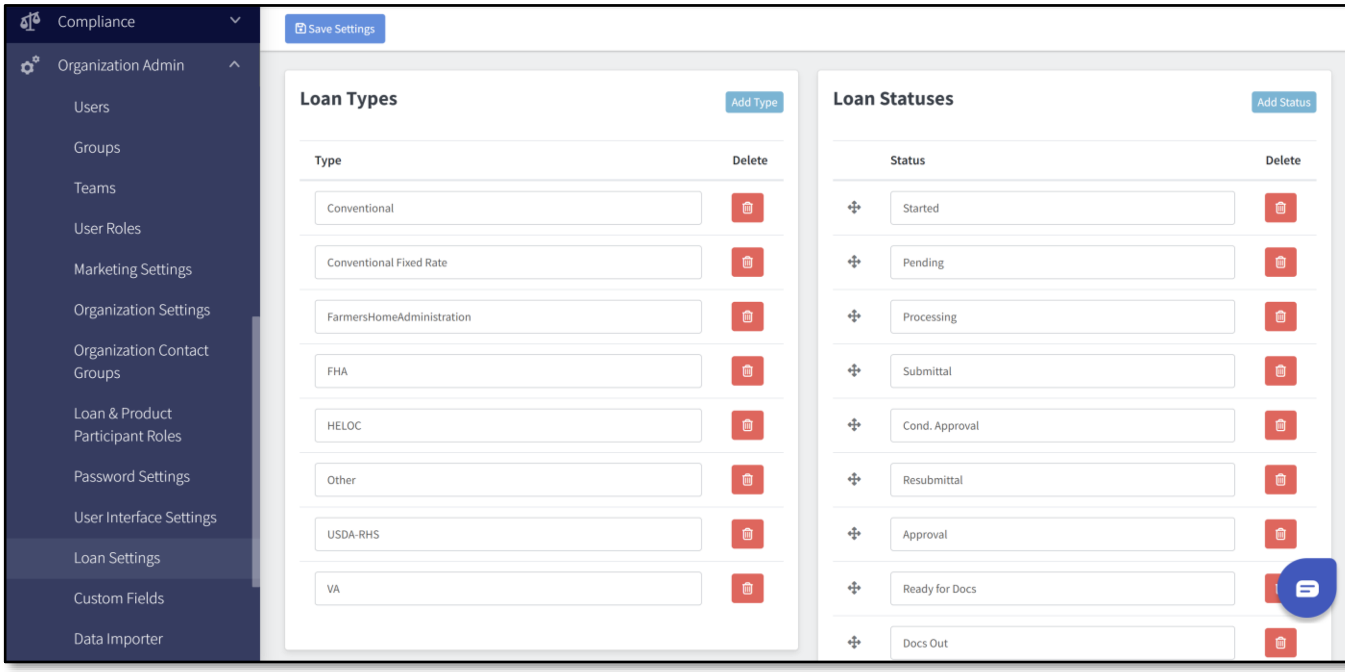

Once this is complete, click the **Loan Programs** tab.

## Admin Settings – Loan Programs, Statuses, Purposes, and Types

In these tabs, you can determine how your Encompass loan programs, statuses, purposes, and types are populated in Total Expert. By enabling you to map these values, your organization can keep consistent terminology between Total Expert and Encompass to enable more consistent reporting.

Of these, only status is a required configuration. If loan programs, purposes, or types are not mapped, the value of the program, purpose, or type from Encompass will populate in Total Expert.

Prior to mapping your Total Expert values, these values must be configured on the Loan Settings page in Total Expert.

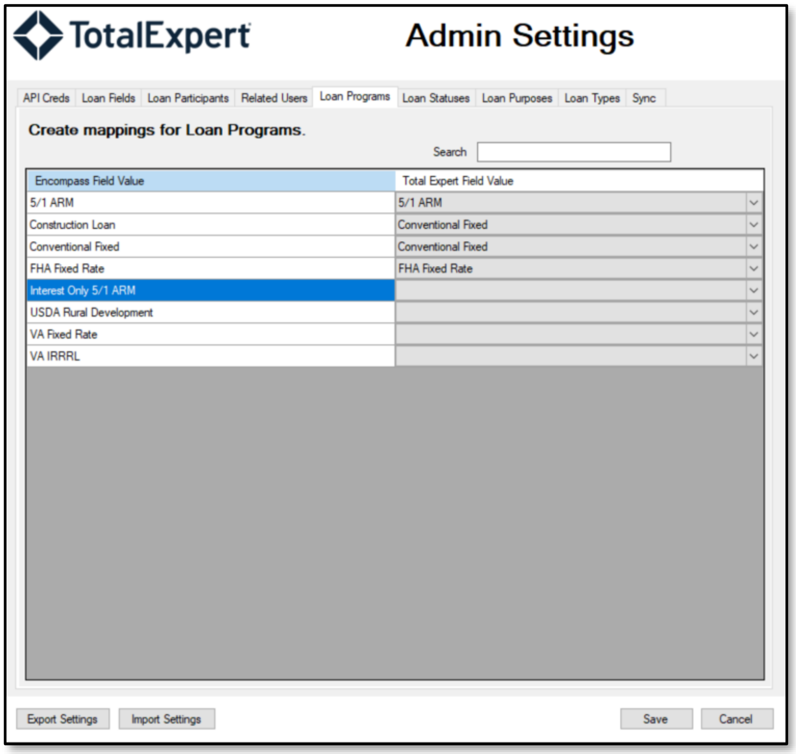



### *Loan Programs*

On the left side of this tab, the loan programs you have configured in Encompass are automatically populated. On the right side is a drop-down list to select your Total Expert loan program for each one.

You can only configure an Encompass loan program once, but you can configure many Encompass loan programs to a single Total Expert loan program.

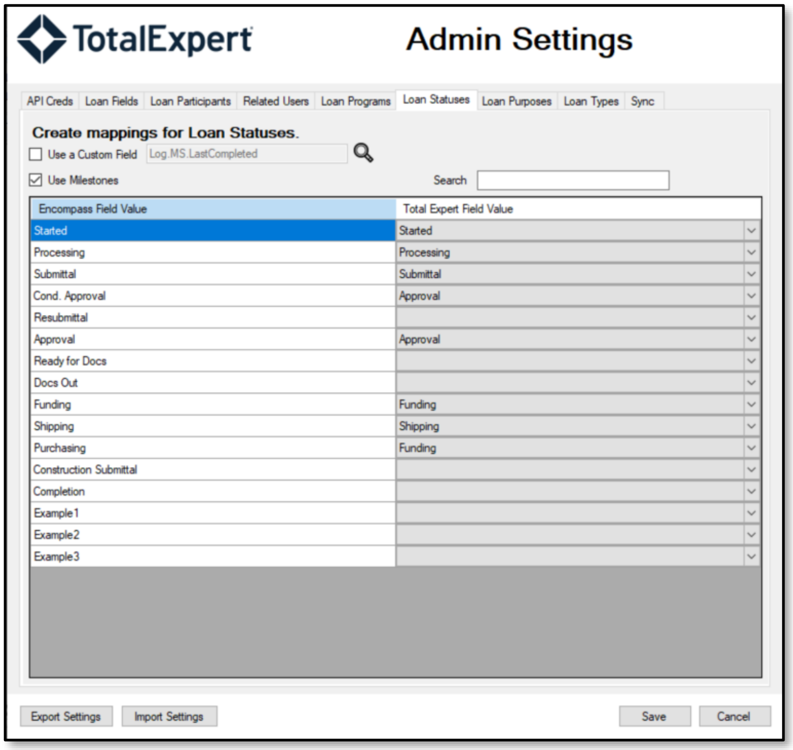
When your loan file is committed, if the mapping is completed, the correlating Total Expert loan program will be used when sending the record to Total Expert.



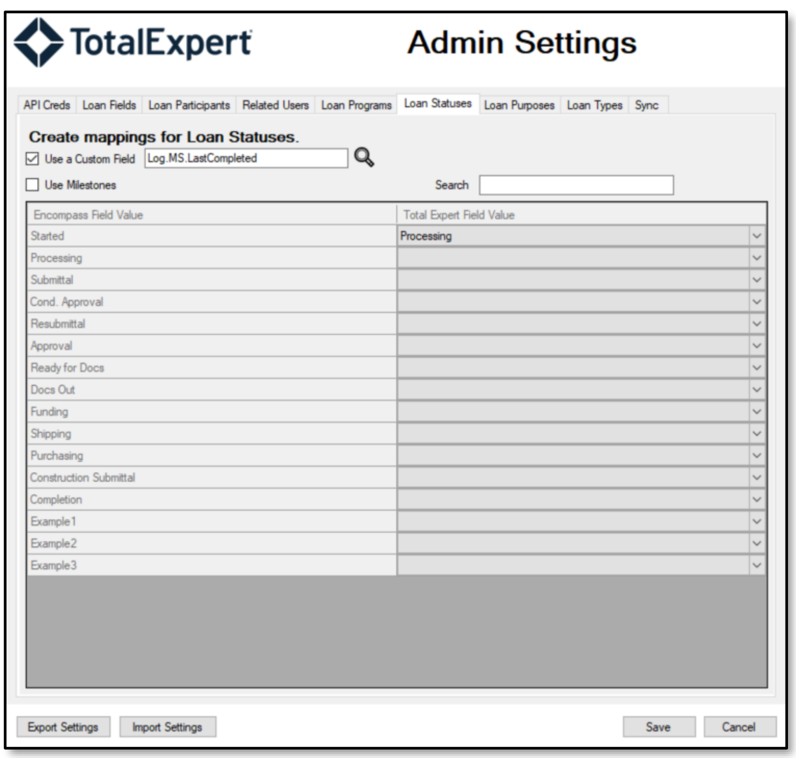

Once this is complete, click the **Loan Statuses** tab.

### *Loan Statuses*

A loan status is an important piece of data to be provided by Encompass, because it manipulates a journey to trigger marketing and workflow automation. On the left side of this tab, the milestones you have configured in Encompass are automatically populated. On the right side is a drop-down list to select your Total Expert loan status for each one.




Alternatively, you can map to any single Encompass field. By doing this, you are not mapping to the Encompass milestones, but instead can have the value of any Encompass field sent to Total Expert as the loan status. This is typically done with a custom field that is populated with a business rule as a combination of loan status and field 1393 (current loan status). For more details on Encompass custom fields and business rules, consult with your representative at ICE or see the Encompass documentation HERE for custom fields and HERE for business rules.



If you elect to map the milestone directly, you can only configure an Encompass milestone once, but you can configure many Encompass milestones to a single Total Expert loan status.

When your loan file is committed, if the mapping is completed, the correlating Total Expert loan status will be used when sending to Total Expert. If a custom field is mapped, the value of that field will be used when sending to Total Expert.

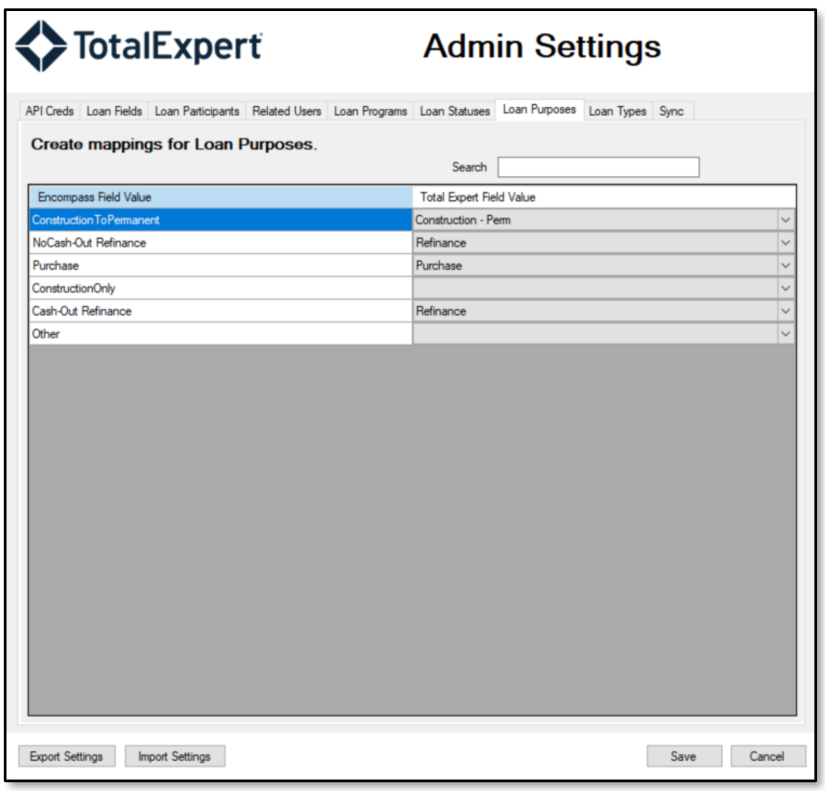
Once this is complete, click the **Loan Purposes** tab.

### *Loan Purposes*

On the left side of this tab, the loan purposes available in Encompass are automatically populated. These are the same values of field 19 (purpose of loan) in Encompass. On the right side is a drop-down list to select your Total Expert loan purpose for each one.

You can only configure an Encompass loan purpose once, but you can configure many Encompass loan purposes to a single Total Expert loan purpose.

When your loan file is committed, if the mapping is completed, the correlating Total Expert Loan purpose will be used when sending to Total Expert.



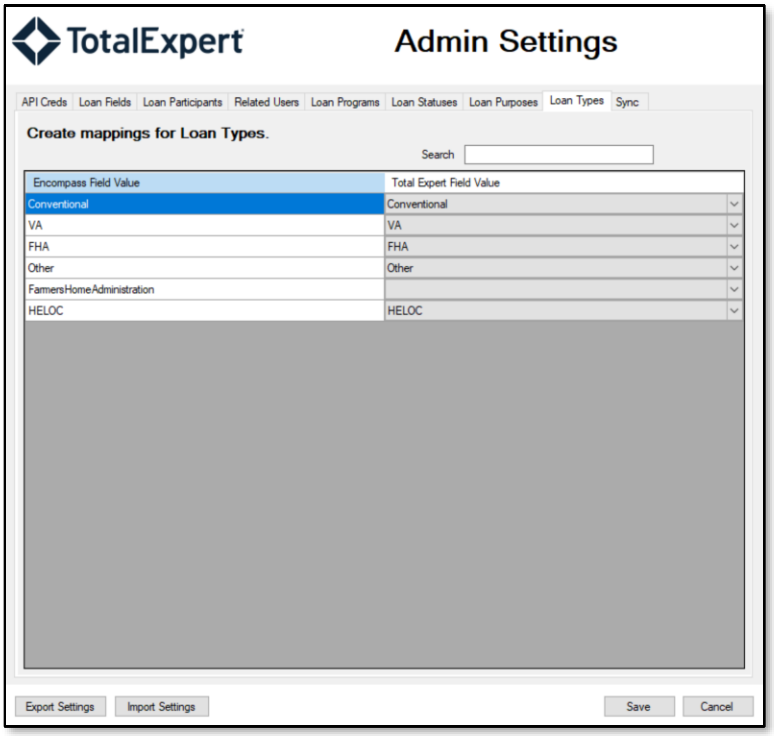

Once this is complete, click the **Loan Types** tab.

### *Loan Types*

On the left side of this tab, the loan types available in Encompass are automatically populated. These are the same values of field 1172 (loan type) in Encompass. On the right side is a drop-down list to select your Total Expert loan type for each one.

You can only configure an Encompass loan type once, but you can configure many Encompass loan types to a single Total Expert loan type.

When your loan file is committed, if the mapping is completed, the correlating Total Expert loan type will be used when sending to Total Expert.

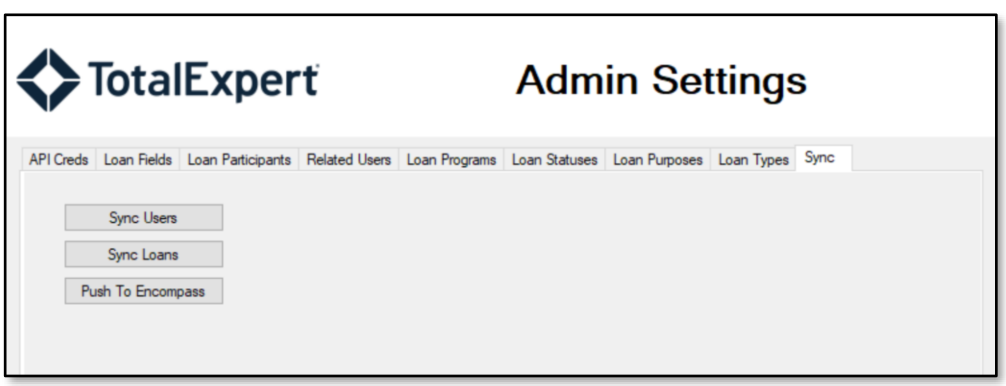



At this point, once you click the **Save** button, your Encompass sync with Total Expert is complete. When a loan file is saved or committed in Encompass, the loan file and participants will be delivered to Total Expert based on your configuration settings.

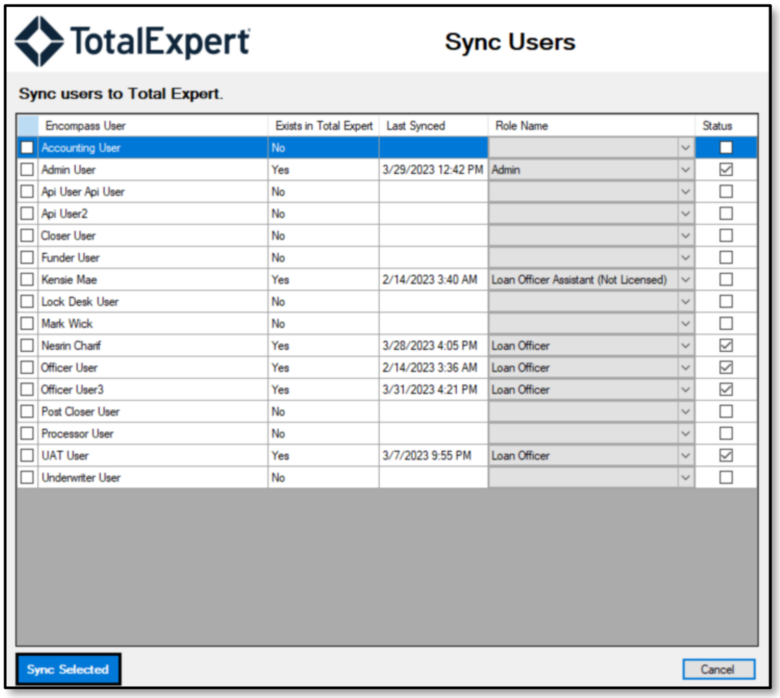
# Data Sync

## Sync Users

As part of the Total Expert utility, you can create or update users in Total Expert, by sending the details stored in Encompass for those users. You can do this by clicking the **Sync** tab, then the **Sync Users** button.



On this page, the available users in your instance of Encompass are fetched and displayed. The screen indicates whether the user exists in Total Expert, when that user was last synced, what the user role is, and the Total Expert status (active/inactive).

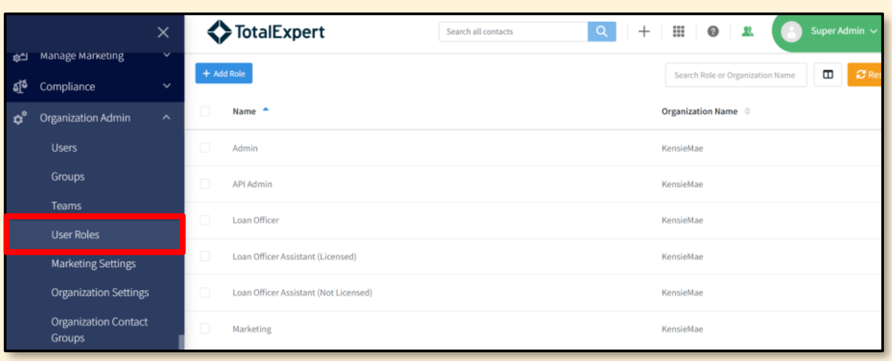



To create or update a user in Total Expert:

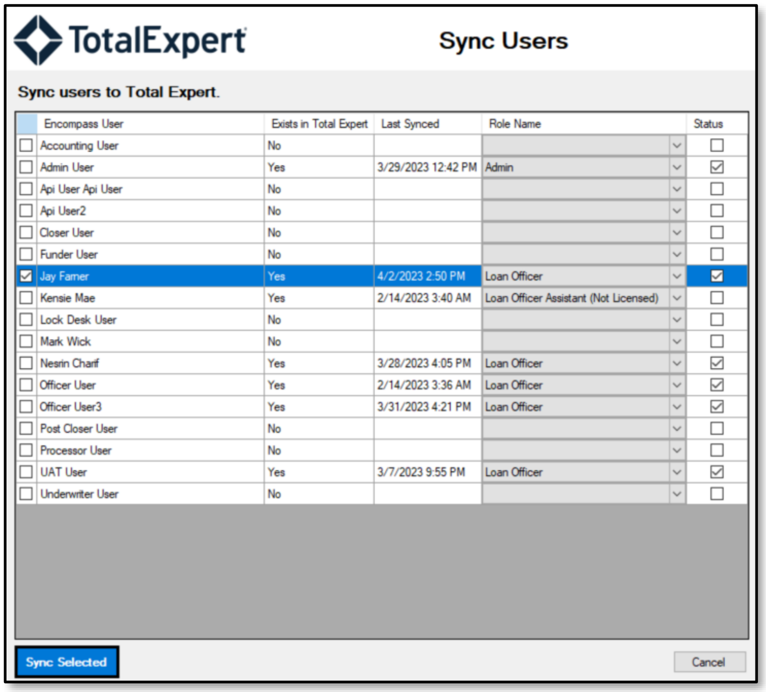
1. Select the check box in the left-most column of the screen next to the user.
2. Select a value in the **Role Name** column to determine the user role and level of access that user should have in Total Expert.

**Note**

You can view user roles in Total Expert by navigating to **Organization Settings → User Roles**.



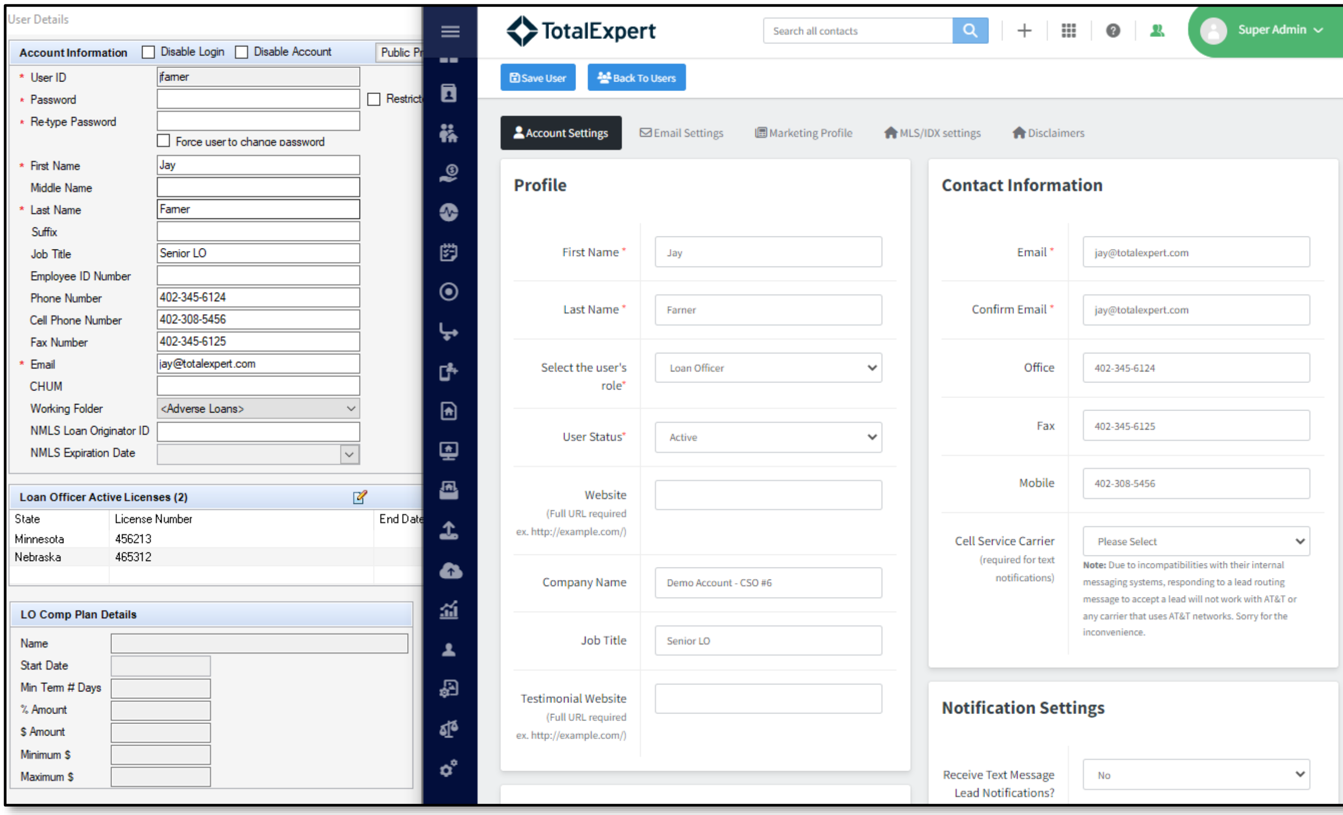

3. Select the checkbox in the **Status** column to make the user active (or deselect it to make the user inactive). If this is not checked, the user will not be able to log in to Total Expert.
4. Click the **Sync Selected** button.

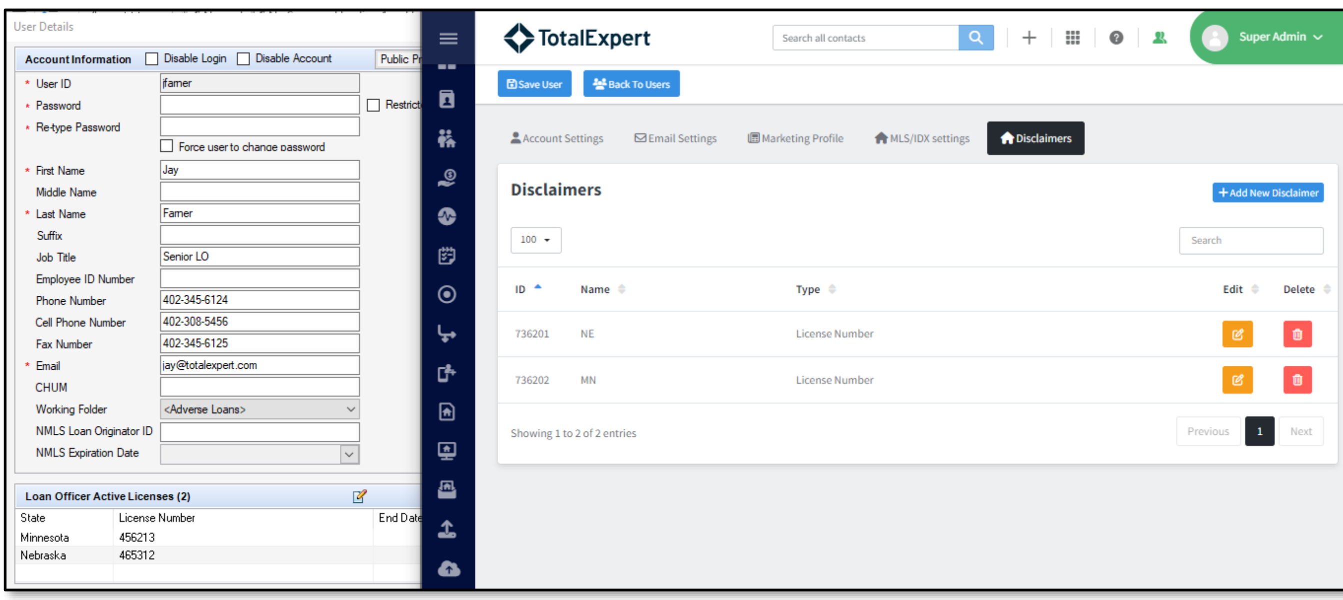



The data to be populated in Total Expert is fetched from the Encompass Organizations/Users setup. For details on Organization/User setup, discuss with your representative at ICE or see the Encompass documentation HERE.

User details that are populated in Total Expert:

| Encompass field | Total Expert field |
|---|---|
| User ID | External ID |
| First Name | First Name |
| Last Name | Last Name |
| Job Title | Job Title |
| Phone Number | Office |
| Cell Phone Number | Mobile |
| Fax Number | Fax |
| Email | Email |
| Loan Officer Active Licenses | Disclaimers/License Number |

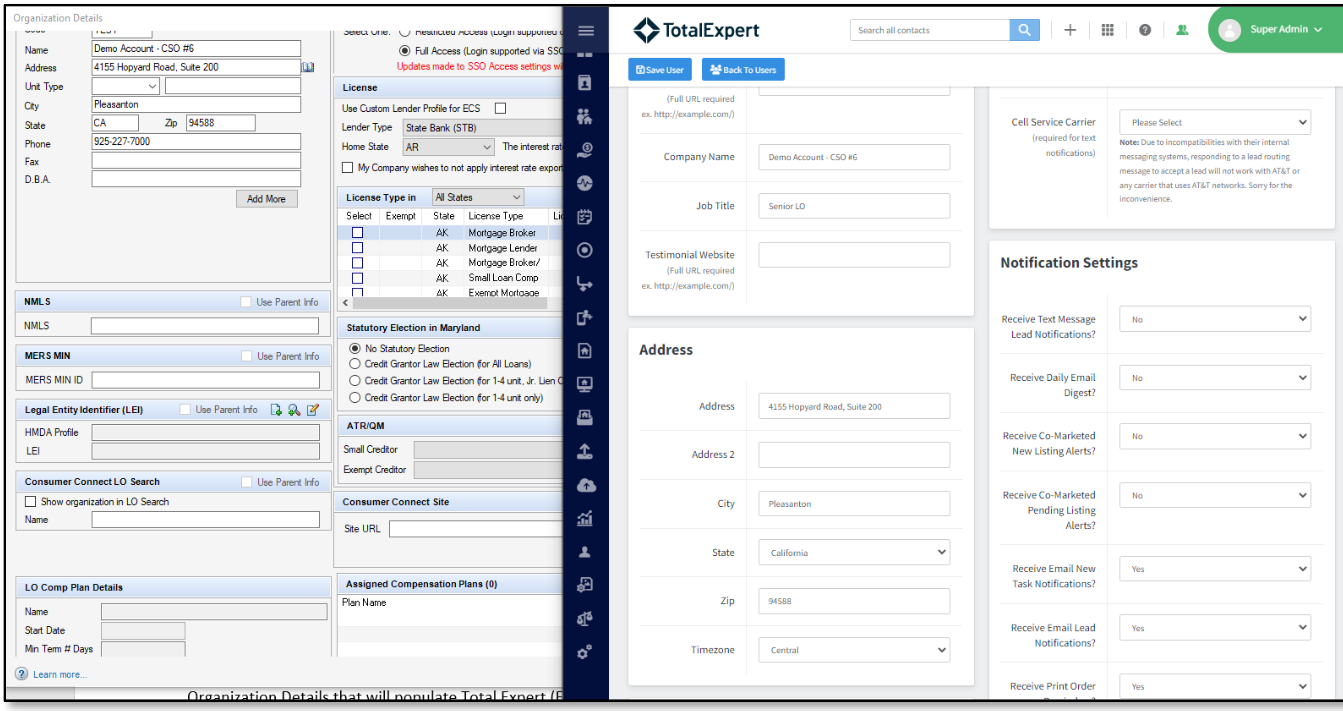



Organization details that are populated in Total Expert:

| Encompass field | Total Expert field |
|---|---|
| Name | Company Name |
| Address | Address |
| City | City |
| State | State |

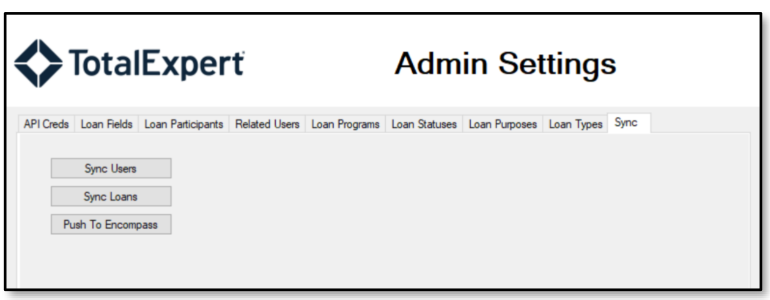
| Encompass field | Total Expert field |
|---|---|
| Zip | Zip |




When users are synced or updated from Encompass to Total Expert, those users can navigate to https://www.totalexpert.net, click **Forgot Password**, and enter the same email address used for Encompass to follow the password reset steps. When they have completed this, they can log in to Total Expert and complete their user profile setup, including uploading a profile image, setting a user bio, and more.

## Sync Loans

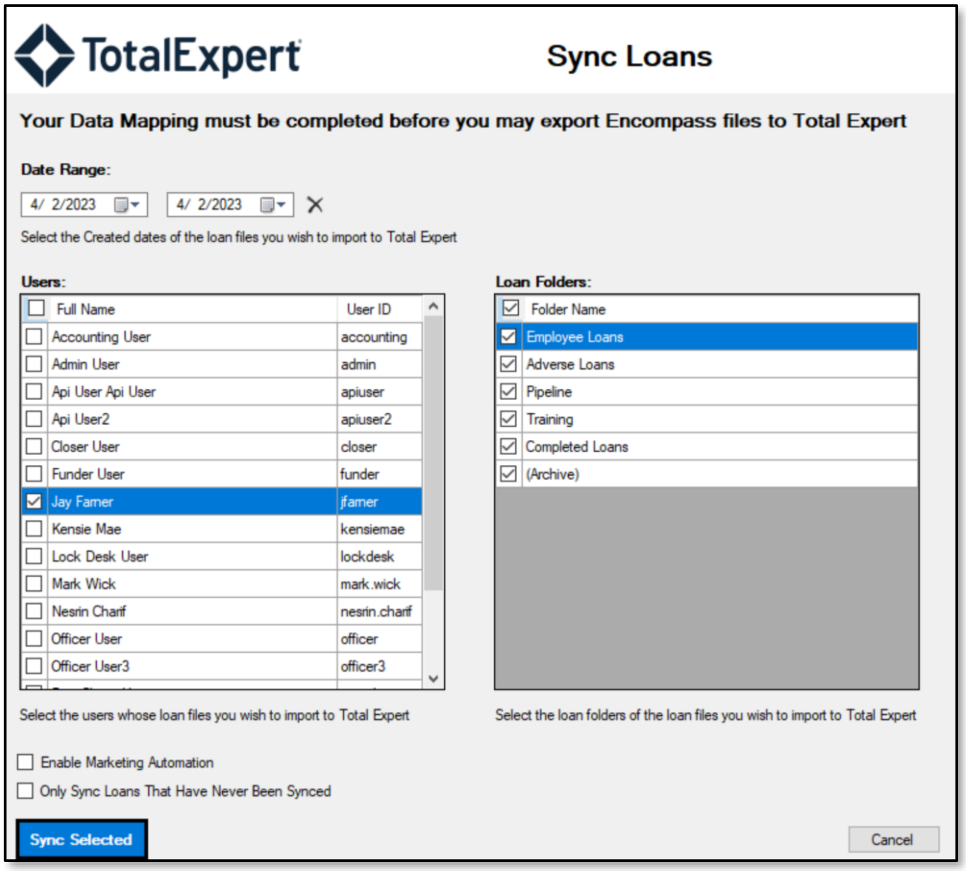
Syncing loans historically or in bulk is also available to you with the Total Expert utility. You can do this by clicking the **Sync** tab, then the **Sync Loans** button. The data mapping configured as part of the Total Expert utility is used for the bulk sync.




On this page:

1. Select the **Date Range** of the loan files you want to sync with Total Expert.These are the dates the loan files were created in Encompass.

2. Select the checkboxes for the Encompass **Users** whose loan files you want to send to Total Expert
3. Select the checkboxes for the **Loan Folders** of those loans.

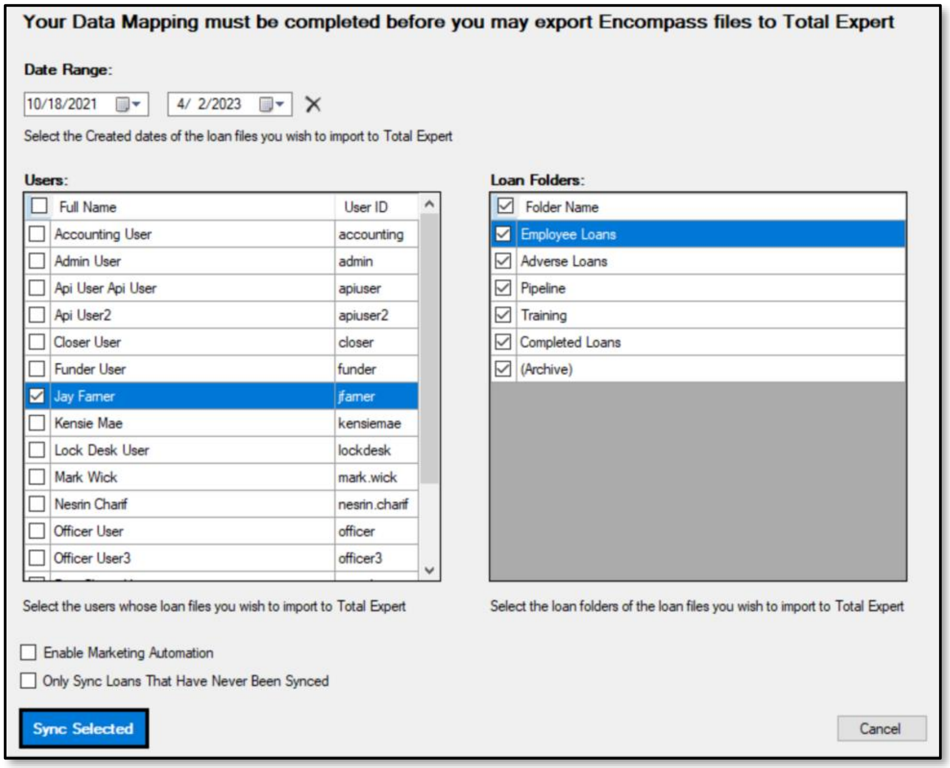



4. (optional) Select the **Enable Marketing Automation** option to start applicable automation in Total Expert when the loans are synced.

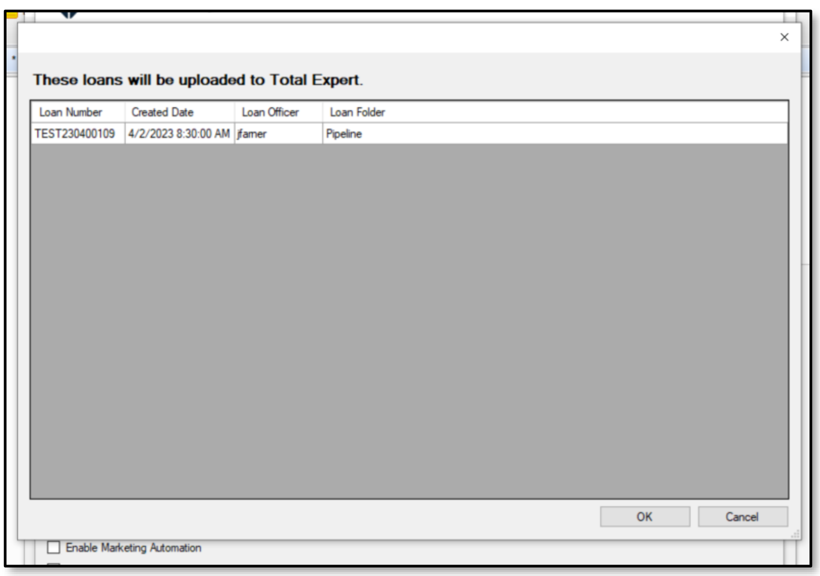
**Warning**

By selecting this option, Total Expert journeys *will* trigger and Total Expert will attempt to deliver any emails or SMS communications as part of those journeys.

5. (optional) Select the **Only Syn Loans That Have Never Been Synced** option if you only want to sync loan files that have never been delivered to Total Expert. This is determined by a value in field `CX.KM.TEI.LASTSYNCED.DT`.
6. Click the **Sync Selected** button.



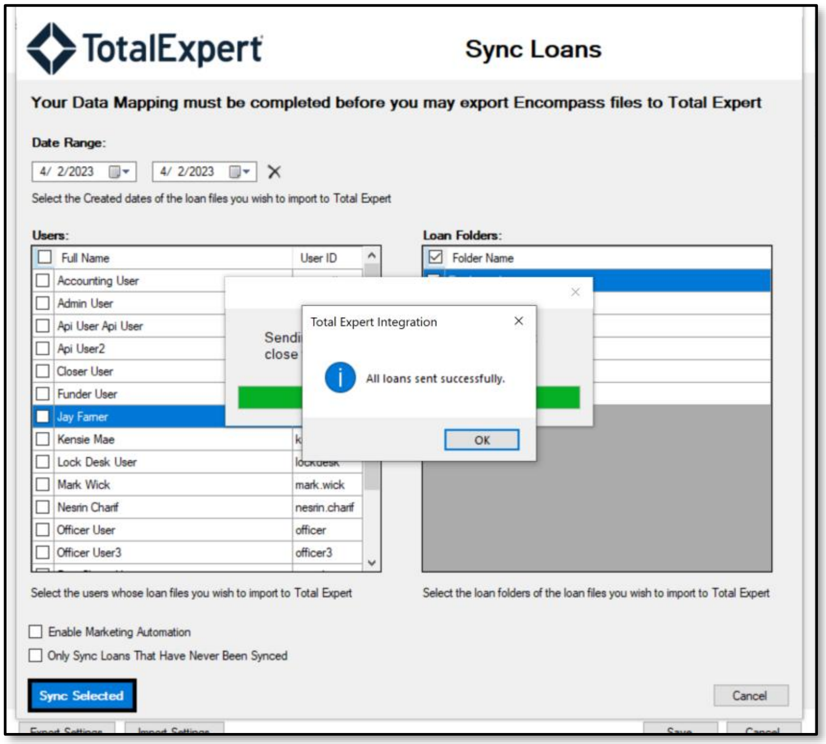

7. A pop-up box appears, displaying the loan files that will be synced. Review the list. If you are satisfied, click the **OK** button to continue.



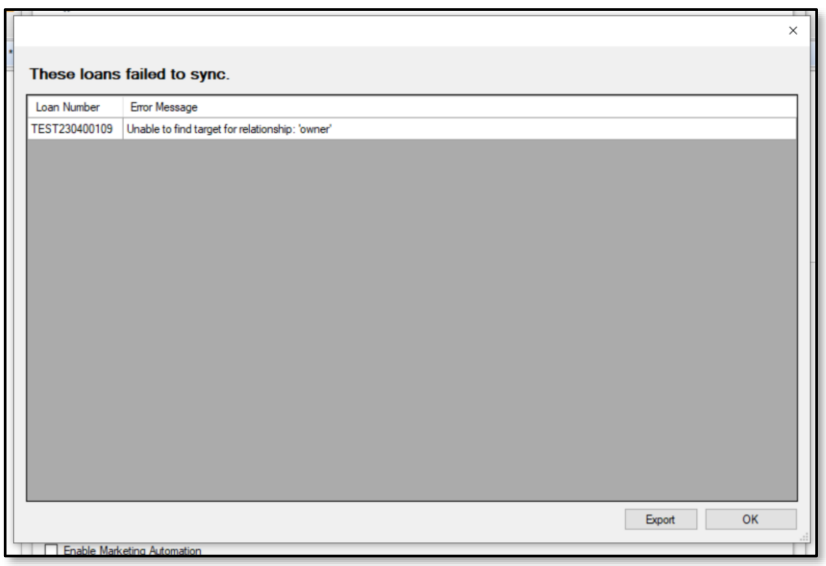

8. A progress bar appears to display the status of the bulk sync operation.

**Warning**
Do not exit the Total Expert utility while the sync is in process.

When the sync is complete, a dialog box indicating success appears.



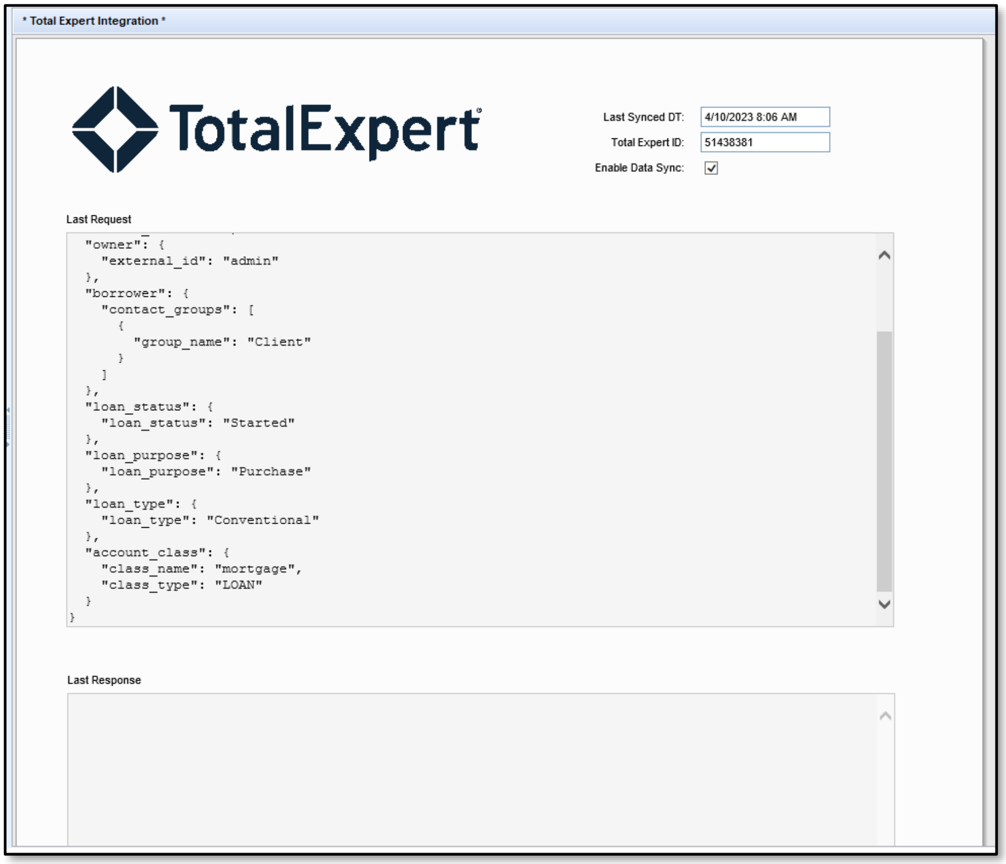

If there was a failure of loans syncing, an error report is displayed. You can export this report to your desktop.




# Troubleshooting

With the Total Expert utility, all the details you would need to troubleshoot any issues are directly at your fingertips. When installing the Total Expert utility, a custom input form is available to your Encompass administrators, or other personas you want to have access.

In the loan file in question, navigate to the ***Total Expert Integration*** form.




In this form, the date and time the loan was last synced with Total Expert is shown, as is the Total Expert unique loan ID. If neither of those fields are populated, the loan has not yet been synced with Total Expert.

## Last Request

In the Last Request section, the API body of the most recent request made to Total Expert is displayed. This shows you in great detail the data that was sent to Total Expert, and where that data was sent. This includes loan details like Loan Number, Subject Property Address, Amortization Type, and more. This also includes loan participant (such as borrower) details, including First Name, Email, Phone and more.

Here is an example of what could display in that field:

```
https://public.totalexpert.net/v1/loans

{
  "external_id": "{ffc78f4b-08d0-470a-aba7-05850e88e6cd}",
  "loan_number": "TEST230400109",
  "source": "Encompass - New File",
  "address": "123 Y Street",
  "address_2": "N",
  "city": "Lincoln",
  "state": "NE",
  "zip_code": "68521",
  "occupancy_type": "PrimaryResidence",
  "application_date": "04/02/2023",
  "created_date": "04/02/2023",
```

```
  "amort_type": "Fixed",
  "county": "Lancaster",
  "owner": {
    "external_id": "jfarner"
  },
  "borrower": {
    "source": "Encompass - New File",
    "first_name": "Rebecca",
    "last_name": "Finster",
    "address": "156 Z Street",
    "address_2": "N",
    "birthday": "03/20/1904",
    "city": "Lincoln",
    "email": "rebecca@test.com",
    "employer_city": "Lincoln",
    "employer_name": "ABC Concrete",
    "employer_state": "NE",
    "employer_zip": "68521",
    "phone_cell": "456-123-4564",
    "phone_home": "123-456-1234",
    "state": "NE",
    "zip_code": "68521",
    "contact_groups": [
      {
        "group_name": "Client"
      }
    ]
  },
  "loan_status": {
    "loan_status": "Processing"
  },
  "loan_purpose": {
    "loan_purpose": "Purchase"
  },
  "loan_type": {
    "loan_type": "Conventional"
  },
  "account_class": {
    "class_name": "mortgage",
    "class_type": "LOAN"
  }
}
```

If you see data being delivered to Total Expert differently than you expect, you must update the mapping in the Total Expert utility accordingly. Additionally, if you are receiving an error, the Last Request field allows you to identify the root of the error.

You can copy this output and provide it to Total Expert support for advanced troubleshooting needs. However, Total Expert is unable to make any changes to your configuration; that resides in your instance of Encompass. Total Expert can only provide guidance.

# Last Response

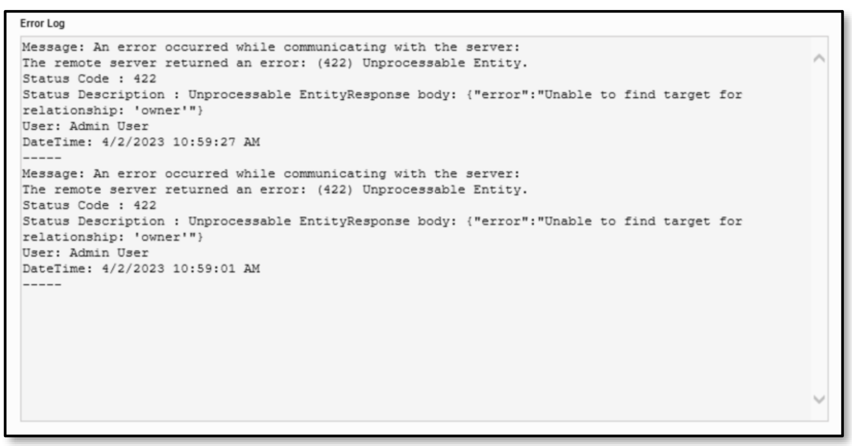
Where the Last Request field shows what was sent to Total Expert, the Last Response field indicates whether or not what Encompass sent successfully made it to Total Expert. Here is an example of a successful sync with Total Expert:

```
{"created":"https:\/\/public.totalexpert.net\/v1\/loans\/51334788","id":5133478
8}
```


A response indicating `created`, `updated`, or `duplicate` means the data was successfully delivered to Total Expert based on the data mapping that has been completed in the configuration steps.

# Error Log

If the sync with Total Expert was unsuccessful, the Last Response field will be blank, and data is available in the Error Log field. This is where you can find the details for why the sync for that loan file failed.




Common errors that you might see in the Error Log field include (but are not limited to):

```
{"error":"Unable to find target for relationship: 'owner'"}
```

```
{"error":"Custom field [custom_string] does not exist."}
```

{"error":"Did not supply sufficient information to create Contact. Please refer to documentation."}

Each of these, coupled with the Last Request data, should provide the steps needed to correct the error, whether that would mean ensuring that the user exists in Total Expert, that the custom field has been configured correctly, or that all required data to create a loan or participant is available in the loan file.

## Support Summary

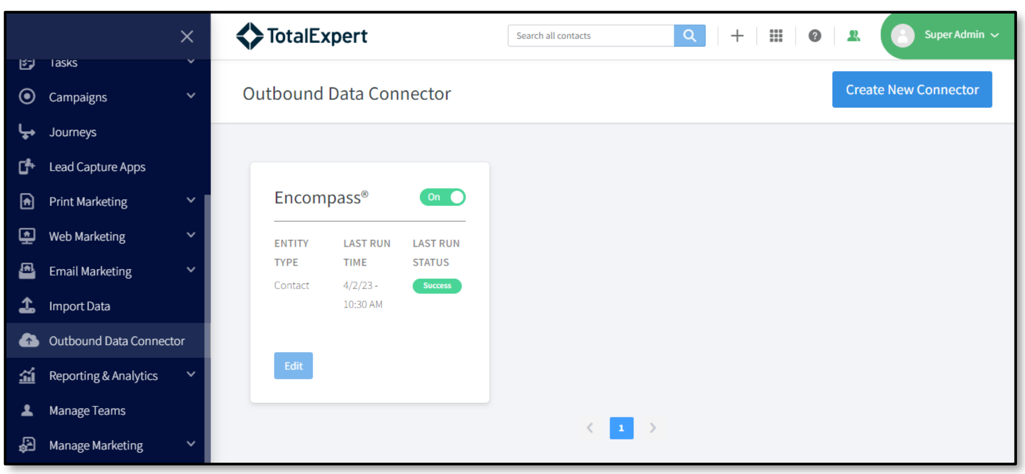
For the most efficient support possible, when reaching out to Total Expert with a request for support, provide an export of your Total Expert utility settings and the details in the Last Request, Last Response, and Error Log fields for further troubleshooting support.

You can generate your own error logging leveraging these Total Expert fields and the Encompass native reporting functionality. For more details on Encompass reporting, discuss with your ICE representative or see the documentation HERE.

# Push to Encompass

Outside of the Total Expert utility, but as part of the integration between Total Expert and Encompass, you can also start a loan file in Encompass directly from Total Expert. This is done using Total Expert's native outbound data connector (ODC). In addition to the information here, you can find more details on Total Expert's ODC HERE.

When pushing a Total Expert contact to Encompass, a loan file is created in the correlating user's default loan program and loan folder.




Using this feature is not a requirement of the Total Expert next gen utility, but if you elect to use this feature, discuss with your Total Expert and KensieMae representative and follow the steps below.

## Prerequisite Details

KensieMae requires ICE API credentials to use this feature. Work with your KM representative to generate these.

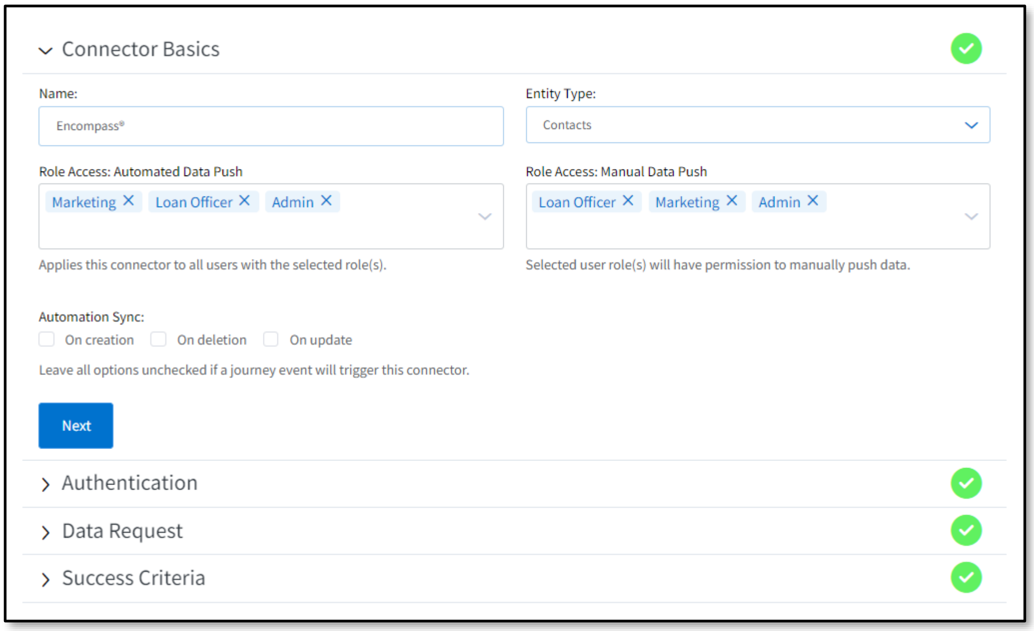
KensieMae will generate an X-KM-API-Key for your organization to be provided to Total Expert. Work with your KM representative to generate this.

Once you've provided KensieMae with your ICE API information and they have generated an X-API-Key for you, send the X-API-Key and your Encompass Instance ID to Total Expert.

When Total Expert has this information, we will create the ODC in your organization's Super Admin user using our default template, as described in the following subsections.

### *Connector Basics*

In the connector configuration, the Basics section allows you to name your connector, determine who has access, and create automation.

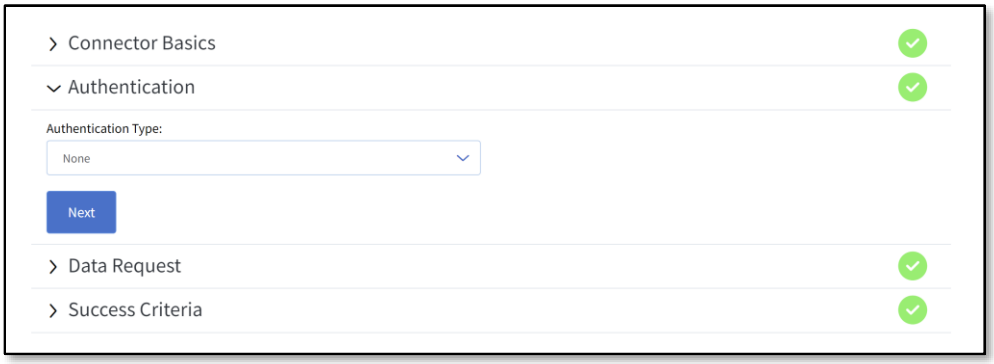



- **Name** – This is what will display on the Contact/Lead record page, for example Push to Encompass.
- **Entity Type** – This must always be **Contacts**.
- **Role Access** – This is where you determine what user roles in Total Expert you want to be able to start a loan file in Encompass.
- **Automation Sync** – By selecting these options, the ODC will be invoked upon the correlating option. For example, if you select On Creation, Total Expert will invoke this ODC each time a contact is created, automatically starting a loan in Encompass.

Click the **Next** button.

### *Authentication*

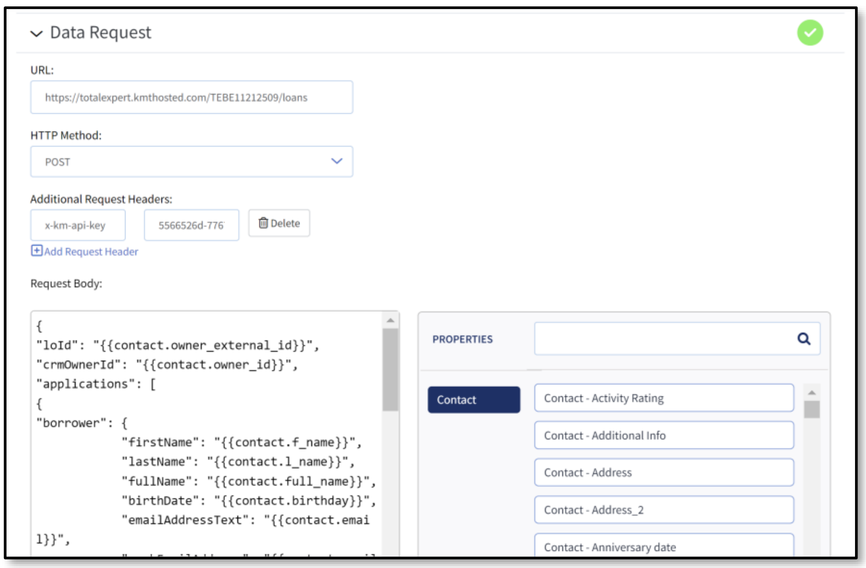
In the Authentication field, select **None**.




Click the **Next** button.

### *Data Request*

The Data Request section is where you identify where the data from Total Expert is going and configure the Encompass Instance ID and your KensieMae X-API-Key.




- **URL** – This must be a root URL with your Encompass instance ID appended to the end, such as: https://totalexpert.kmthosted.com/{{encompassInstanceID}}/loans
- **HTTP Method** –This should always be **POST**.
- **Additional Request Headers** – Add one header with the following details:
    - **Key** – x-km-api-key
    - **Value** – Enter the key provided by KensieMae.
- **Request Body** – Total Expert configures the default body for you. The data that will be sent to Encompass to start the loan file will include:
    - owner external ID (used to assign the loan file)
    - first name, last name
    - birthday
    - email address
    - work email
    - fax

- phone (cell, home, office)
- address
- city
- state
- ZIP code
- employment details
  - employer name
  - employer address, city, state, ZIP code

Here is an example request body:

```
{
"loId": "{{contact.owner_external_id}}",
"crmOwnerId": "{{contact.owner_id}}",
"applications": [
{
"borrower": {
            "firstName": "{{contact.f_name}}",
            "lastName": "{{contact.l_name}}",
            "fullName": "{{contact.full_name}}",
            "birthDate": "{{contact.birthday}}",
            "emailAddressText": "{{contact.email}}",
            "workEmailAddress": "{{contact.email_work}}",
            "personFaxNumber": "{{contact.fax}}",
            "homePhoneNumber": "{{contact.phone_home}}",
            "mobilePhone": "{{contact.phone_cell}}",
            "workPhoneNumber": "{{contact.phone_office}}",
            "crmId":"{{contact.id}}"
        },
        "residences": [
            {
            "urla2020StreetAddress": "{{contact.address}}",
            "addressCity": "{{contact.city}}",
            "addressPostalCode": "{{contact.zip}}",
            "addressState": "{{contact.state}}",
            "applicantType": "Borrower",
            "residenceyType": "Current"
            }
        ],
        "employment": [
            {
            "owner": "Borrower",
            "employerName": "{{contact.employer}}",
            "urla2020StreetAddress": "{{contact.employer_address}}",
            "addressCity": "{{contact.employer_city}}",
            "addressState": "{{contact.employer_state}}",
            "addressPostalCode": "{{contact.employer_zip}}"

            }
        ]
           }
    ],
    "leadSource": "{{contact.lead_source}}",
    "referral": "{{contact.referred_by}}"
}
```

> **Note**
> if the birth date is more than 115 years in the past, it will be ignored. This is to account for birth year not being collected.

Click the **Next** button.

### *Success Criteria*

The setup in this section should always be:

- **Source** – Select **StatusCode**.
- **Comparator** – Select **Contains**.
- **Value** – Enter 20.

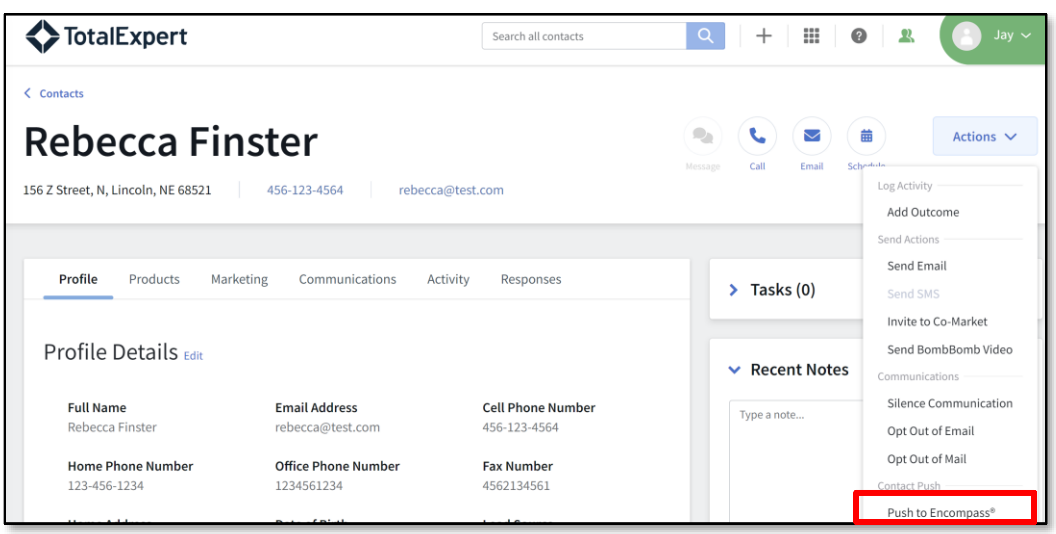
Click the **Save & Publish** button if you are ready to activate. Otherwise, click the **Save** button to save your work.


## Using the Outbound Data Connector (ODC)

Once the connector is configured and published, any user with one of the user roles you configured can leverage it. They can do this manually or through a journey.

### *Manual Push*

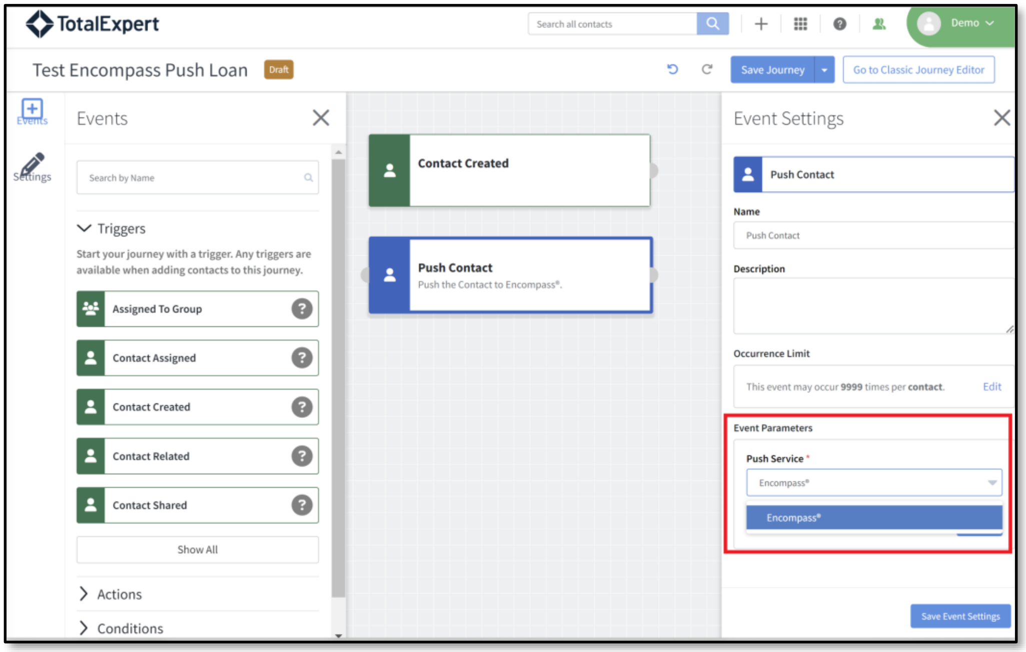
In a contact or lead record, select **Actions → Push to Encompass**:



After a few seconds, a success message will appear at the top of the screen.

### *Journey Push*

Users with the appropriate permissions in Total Expert can configure a Push Contact action in a journey. When the connector has been published, its name appears as an option in the Push Contact action's parameters.




A contact who is put on that journey will have their contact details sent to Encompass to start a loan file if all conditions are met.