# Encompass Next Gen Feature and Configuration Guide

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## 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.

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## **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.

GUID         External ID           an         364         Loan Number           an         2024         Source           an         3         Loan Rate           an         4         Loan Term           an         136         Purchase Price           an         355         Appraised Value           an         934         Is First Time Home Buyer           an         1041         Property type           an         11         Address Line 1           an         URLLX.X175         Address Line 2           an         12         Cty	Sync Type	Field ID	TE Display Name	Encompass Description	
an     364     Loan Number       an     2024     Source       an     3     Loan Rate       an     4     Loan Term       an     136     Purchase Rrice       an     356     Appraised Value       an     534     Is First Time Home Buyer       an     1041     Property type       an     11     Address Line 1       an     12     City	oan			Encompass Description	
2024         Source           an         3         Laan Rate           an         4         Laan Term           an         136         Purchase Rice           an         355         Appraised Value           an         934         Is First Time Home Buyer           an         1041         Property type           an         11         Address Line 1           an         12         Oby	oan				
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an 12 Oby tom Relds Search 0 2	oan	11	Address Line 1		
tom Relds	oan	URLA.X175	Address Line 2		
Null i renze	oan	12	City		
	ustom Fields		Search		0 2
	Sync Type	Field ID TE Display I	Name Encompass Description		
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### 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.

🔷 Tota	lExpert	Admin Settings
Settings Loan Fields Set API Cred API Credentials Usemame: Password:	eds	Loan Programs Loan Statuses Loan Purposes Loan Types Sync
Account Classifi TE Connect		

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.

Settings Loan Fields Loan Participants Rela	ted Users Loan Programs Loan Statuses Loan Purposes Loan Type	s Sync
Set API Creds	Name:	
API Credentials		
Usemame:		
Password:		
Account Classification:	~ 0	
TE Connection ID:	• 0	
Filter: 2		
Loan Folders Avail 4		

* Total Expert Integration *			
	Last Synced DT: Total Expert ID: Enable Data Sync: Total Expert Connection ID:	4/14/2023 1:29 PM 51365776 1 2 3	0
https://public.totalexpert.net/v1/loans/51365776		4	^

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oan Custom Fie	eld Editor					×
Field ID Description Format	CX. KM.TELCONNECTIOND Unique identifier for multi-connections DROPDOWN		Calculation CX.KM.TELCONNECTIONID =			
Options 1 2 3		Add Move Up				
4		Move Down Delete			Vali	date
				OK	Can	

### 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.

		pert	Ac	imin S	Settings	
PI Creds Loan F Modify the Standard Fields			ers Loan Programs Loan St	atuses Loan Pu iearch	rposes Loan Types Sync	] 🖉
Sync Type	Field ID		TE Display Name		Encompass Description	^
Loan	GUID		External ID			
Loan	364		Loan Number			
Loan	2024		Source			
Loan	3		Loan Rate			
Loan	4		Loan Term			
Loan	136		Purchase Price			
Loan	356		Appraised Value			
Loan	934		Is First Time Home Buyer			
Loan	1041		Property type			
Loan	11		Address Line 1			
Loan	URLA.X175		Address Line 2			
Loan	12		City			
Custom Fields			s	iearch		0 🕜 🖒
Sync Type	Field ID	TE Display Name	Encompass Description			
Enable Data						

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 <u>HERE</u>.

#### 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.

Display Name	Attorney		System Name attorney	
Standard Fields			Search	[
Sync Type	Field ID	TE Display Name	Encompass Description	
Loan	VEND.X118	Phone - Office		
Loan	56	Employer Name		
Loan	VEND.X982	Employer License Number		
Loan	VEND.X721	License Number		
Loan	VEND.X119	Email - Work		
Loan	VEND.X112	Employer Address		
Loan	VEND.X113	Employer City		
Loan	VEND.X114	Employer State		
Loan	VEND.X115	Employer Zip		
Loan		Sync with Total Expert		
				_
Contact Groups (	comma delimited)			
Attomey				
			Search	 <b>.</b>
Custom Fields			Search	 2
Sync Type	Field ID	TE Display Name E	ncompass Description	

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 <u>HERE</u> for custom fields and <u>HERE</u> 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.

	Borrower			tower	
Standard Fields			Search		[
Sync Type	Field ID		TE Display Name	Encompass Description	_
Loan			Pre Approval Issued Date		_
Loan	1822		Referred By		_
Loan	FR0107		State	Borr Present State	_
Loan	4003		Suffix		_
Loan	FR0108		Zip Code	Borr Present Zip	_
Loan	must be a cu		Credit Range		_
Loan	DISCLOSUF		Credit Score Date		_
Loan		xpirationDate.Credit Report	Credit Score Expiration Date		_
Loan	1822		Referred Ry		-
Loan			SMS Opt In		-
Contact Groups (	comma delimited)	)			
Client					
Custom Fields			Search	•	2
Sync Type	Field ID	TE Display Name	Encompass Description		

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 <u>HERE</u> for custom fields and <u>HERE</u> 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.

TotalExpert	Admin Settings
	an Programs Loan Statuses Loan Purposes Loan Types Sync
Set API Creds	
Usemame: [c34c33d40c4fd73fb5c086e3bb8d36a	a
Password:	•••••
Account Classification: mortgage	~
Filter:	x
Loan Folders Available to Sync     Employee Loans	
Adverse Loans     Pipeline	
Completed Loans (Archive)	
✓ Enable Push to Total Expert	
Export Settings Import Settings	Save Exit

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.

Field ID GUID 364 2024 3 4		Search	Encompass Description	
GUID 364 2024 3 4		External ID Loan Number Source	Encompass Description	
364 2024 3 4		Loan Number Source		_
2024 3 4		Source		
3 4				
4		Loan Rate		
			Trans Details Interest Rate	
		Loan Tem		
136		Purchase Price		
356		Appraised Value		
934		Is First Time Home Buyer		
1041		Property type		
11		Address Line 1		
URLA.X175		Address Line 2		
12		City		~
		Search		♀ ⊻ ×
Field ID	TE Display Name	Encompass Description		
	934 1041 11 URLA.X175 12	934 1041 11 URLA X175 12	934         Is First Time Home Buyer           1041         Property type           11         Address Line 1           URLA X175         Address Line 2           12         City	1041         Is First Time Home Buyer           1041         Property type           11         Address Line 1           URLA X175         Address Line 2           12         Oity             Search

### 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:

Modify the	list of field	ds to sync.		
Standard Fields		-	Search	Loan
Sync Type	Field ID	TE Display Name	Encompass Description	
Loan	364	Loan Number		
Loan		Loan Rate		
Loan	4	Loan Term		
Loan	2	Loan Amount		
Loan		Loan Date		
Loan	353	Loan To Value	Freddie Mac Loan To Value (LTV)	

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.

	_ Fie	Id Selection Search Rate
	FieldID D	escription
	1014 Tra	ans Details Qual Rate
	1086 Tra	ans Details Qual Rate Basis
	1267 Tra	ans Details Amort Type GPM Rate
	1269 Lo	an Info Buydown Rate 1
		an Info Buydown Rate 1 an Info Buydown Rate 2
- 0	1270 Lo	
_	1270 Lo 1271 Lo	an Info Buydown Rate 2
_	1270 Lo 1271 Lo 1272 Lo	an Info Buydown Rate 2 an Info Buydown Rate 3
_	1270 Lo 1271 Lo 1272 Lo 1273 Lo	an Info Buydown Rate 2 an Info Buydown Rate 3 an Info Buydown Rate 4
alExpert Sync Fie	1270 Lo 1271 Lo 1272 Lo 1273 Lo 1274 Lo	an Info Buydown Rate 2 an Info Buydown Rate 3 an Info Buydown Rate 4 an Info Buydown Rate 5
_	1270 Lo 1271 Lo 1272 Lo 1273 Lo 1274 Lo 1290 Fre	an Info Buydown Rate 2 an Info Buydown Rate 3 an Info Buydown Rate 4 an Info Buydown Rate 5 an Info Buydown Rate 6
Expert Sync Fie	1270         Lo           1271         Lo           1272         Lo           1273         Lo           1274         Lo           1290         Fre           1344         VA	an Info Buydown Rate 2 an Info Buydown Rate 3 an Info Buydown Rate 4 an Info Buydown Rate 5 an Info Buydown Rate 6 eddie Mac Lender Rate Adj Convertible
_	1270         Lo           1271         Lo           1272         Lo           1273         Lo           1274         Lo           1290         Fre           1344         VA           1482         HE	an Info Buydown Rate 2 an Info Buydown Rate 3 an Info Buydown Rate 4 an Info Buydown Rate 5 an Info Buydown Rate 5 an Info Buydown Rate 6 oddie Mac Lender Rate Adj Convertible Buyer Purch Lot Separately
_	1270         Lo           1271         Lo           1272         Lo           1273         Lo           1274         Lo           1290         Fre           1344         VA           1482         HE           1487         Su	an Info Buydown Rate 2 an Info Buydown Rate 3 an Info Buydown Rate 4 an Info Buydown Rate 5 an Info Buydown Rate 6 ddie Mac Lender Rate Adj Convertible Buyer Purch Lot Separately LUC Teaser Rate

### 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.

ustom Fields			Search	0	2	×
Sync Type	Field ID	TE Display Name	Encompass Description			
						_

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.



Sync Type	Field ID		TE Display Name		Encompass Description		^
Loan	GUID		External ID				
Loan	364		Loan Number				
Loan	2024		Source				
Loan	3		Loan Rate				
Loan	4		Loan Term				
Loan	136		Purchase Price				
Loan	356		Appraised Value				
Loan	934		Is First Time Home Buyer				
Loan	1041		Property type				
Loan	11		Address Line 1				
Loan	URLA.X175	5	Address Line 2				
Loan	12		City				
Loan	14		State				
Custom Fields			Searc	h		0	2 ×
Sync Type	Field ID	TE Display Name	Encompass Description				
	3315	Garden Level	Property Info Is Condotel				

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.

tandard Participar			Search		
Display Name Attorney	System Name				
Borrower	attorney borrower				
Buyer's Agent	buyers_agent	 		 	 
Co-Borrower	coborrower	 		 	 
Seller's Agent	sellers_agent	 			 
Settlement Agent	settlement_agent				
ustom Participants			Search		0 2
Lustom Participants Display Name	s System Name		Search		0 2

### 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.

API Creds Loan Fie	Ids Loan Participants Related Users Loan Programs Lo	oan Statuses Loan Purposes Loan Types Sync
Modify the lis	st of Participants.	
Standard Participant	s	Search borrower
Display Name	System Name	
Borrower	borrower	
Co-Borrower	coborrower	

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

Sync Type         Field ID         TE Display Name         Encompass Description           Loan         2024         Source         Image: Compass Description           Loan         4000         First Name         Image: Compass Description           Loan         4002         Last Name         Image: Compass Description           Loan         4002         Last Name         Image: Compass Description           Loan         FR0104         Address Line 1         Borr Present Addr           Loan         URLAX175         Address Line 2         Image: Compass Description           Loan         1402         Birthday         Image: Compass Description           Loan         FR0105         City         Borr Present Oty           Loan         1240         Email         Image: Compass Description           Loan         1240         Email         Image: Compass: Compass Description           Loan         1240         Email         Image: Compass: Compass: Compass: Compase Description	Field ID     TE Display Name     Encompass Description       2024     Source       4000     First Name       4002     Last Name       4002     Last Name       FR0104     Address Line 1       Borr Present Addr       URLA X175     Address Line 2       1402     Bithday       FR0106     Cky       Close Date       1240     Email       1178     Email       EE0104     Emolouse Address Line 1       ps (comma delimited)	Sync Type         Field ID         TE Display Name         Encompass Description           Loan         2024         Source         Inst Name           Loan         4000         Fint Name         Inst Name           Loan         4002         Last Name         Inst Name           Loan         4002         Last Name         Inst Name           Loan         4002         Last Name         Inst Name           Loan         VRLA X175         Address Line 1         Borr Present Addr           Loan         URLA X175         Address Line 2         Inst Name           Loan         1402         Bithday         Inst Name           Loan         1402         Bithday         Inst Name           Loan         FR0106         City         Borr Present City           Loan         1240         Email         Inst Name           Loan         1778         Email         Inst Name           Loan         FERUID         Freedware Addreset Inst 1         Contact Groups (comma delimited)           Clent         Contact Strouge Comma delimited)         Contact Groups (comma delimited)         Contact Groups (comma delimited)
Laan         2024         Source           Loan         4000         First Name           Loan         4002         Leat Name           Loan         4002         Leat Name           Loan         FR0104         Address Line 1           Joan         FR0104         Address Line 2           Loan         URLA X175         Address Line 2           Loan         1402         Birthday           Loan         FR0106         City         Borr Present City           Loan         FR0106         City         Borr Present City           Loan         1240         Email         Loan           Loan         1178         Email         Loan           Loan         1240         Email         Loan           Cortact Groups (comma delimited)         Emolouic Address Line, 1         Cortact Groups (comma delimited)	2024     Source       4000     First Name       4002     Last Name       4002     Last Name       FR0104     Address Line 1       Borr Present Addr     URLAX175       1402     Birthday       FR0106     Cty       Close Date     1240       Ernal     Work       EE0104     Enclower Address Line 1	Loan     2024     Source       Loan     4000     First Name       Loan     4002     Last Name       Loan     4002     Last Name       Loan     FR0104     Address Line 1       Borr Present Addr     Loan       URLA X175     Address Line 2       Loan     URLA X175       Loan     FR0104       Loan     Hady       Loan     FR0106       City     Borr Present City       Loan     Close Date       Loan     1240       Email     Mork       Lean     FE0104       Context Groups (comma delimited)       Client     Search
Loan         4000         First Name           Loan         4002         Last Name           Loan         FR0104         Address Line 1         Borr Present Addr           Loan         FR0104         Address Line 2         Intervention           Loan         URLA X175         Address Line 2         Intervention           Loan         1402         Birthday         Intervention           Loan         FR0106         City         Borr Present City           Loan         FR0106         City         Borr Present City           Loan         1240         Email         Intervention           Loan         1178         Email         Intervention           Loan         EE0104         Emolouse & Address Line 1         Intervention           Contact Groups (comma delimited)         Emolouse & Address Line 1         Intervention	4000     First Name       4002     Last Name       4002     Last Name       FR0104     Address Line 1       URLAX175     Address Line 2       1402     Birthday       FR0106     Cty       Close Date     1240       Email     Intra       EE0104     Email       1778     Email - Work       EE0104     Enclower Addrese Line 1	Loan         4000         First Name           Loan         4002         Last Name           Loan         FR0104         Address Line 1         Bor Present Addr           Loan         IR0104         Address Line 1         Bor Present Addr           Loan         URLA.X175         Address Line 2         Image: Comparison of the state
Loan         FR0104         Address Line 1         Borr Present Addr           Loan         URLA X175         Address Line 2            Loan         1402         Birthday            Loan         FR0106         City         Borr Present City           Loan         FR0106         City         Borr Present City           Loan         Idea         Cose Date            Loan         1240         Email            Loan         1240         Email - Work            Loan         EE0104         Email- Work            Loan         EE0104         Email- Work	FR0104     Address Line 1     Borr Present Addr       URLA X175     Address Line 2       1402     Bithday       FR0106     City       0000     City       1240     Email       1178     Email       560104     Emolower Address Line 1       560104     Search	Loan FR0104 Address Line 1 Borr Present Addr Loan URLA X175 Address Line 2 Loan 1402 Bithday Loan FR0106 City Borr Present City Loan 1240 Email Loan 1240 Email Loan 1178 Email Contact Groups (comma delimited) Contact Groups (comma delimited) Contact Groups (comma delimited)
Loan         URLA X175         Address Line 2           Loan         1402         Birthday           Loan         FR0106         City         Borr Present City           Loan         FR0106         City         Borr Present City           Loan         1240         Email         Email           Loan         1240         Email         Cortect Groups (comma delimited)	URLA X175     Address Line 2       1402     Bithday       FR0106     City       Close Date       1240     Email       1178     Email - Work       EF0104     Emoleuser Arkhere Line 1	Loan URLA X175 Address Line 2 Loan 1402 Birthday Loan FR0106 City Borr Present City Loan Cose Date Loan 1240 Email Loan 1178 Email Vork Loan EE01004 Email Contact Groups (comma delimited) Citent Contact Groups (comma delimited) Citent Search Cose Search Cite Cose Cose Cose Cose Cose Cose Cose Cos
Loan         1402         Birthday           Loan         FR0106         City         Borr Present City           Loan         FR0106         City         Borr Present City           Loan         1240         Email         Cose Date           Loan         1178         Email         Contact Groups (comma delimited)	1402     Bithday       1402     Bithday       FR0106     City       Oose Date       1240       Enail       1178       Email - Work       FE0104       Emolouse Address Line 1	Loan 1402 Bithday Loan FR0106 City Bor Present City Loan 1240 Email Loan 1240 Email Loan 1240 Email Loan 1178 Email Vork Loan EE010A Email Contact Groups (contrast Groups (contrast delimited) Client Search City Custom Fields
Loan         FR0106         City         Borr Present City           Loan         Close Date         Close Date         Close Date           Loan         1240         Email         Close Date         Close Date           Loan         1270         Email         Close Date         Close Date           Contact Groups (comma delimited)         Close Date         Close Date         Close Date	FR0106     City     Borr Present City       Close Date     Close Date       1240     Email       1178     Email - Work       FE010M     Emclower Address Lice 1       ps (comma delimited)     Search	Loan FR0106 City Bort Present City Loan Cose Date Loan 1240 Email Loan 1178 Email Work Lean EED104 Email Contact Groups (contrad delimited) Citent Custom Fields Custom Fi
Loan         Close Date           Loan         1240         Email           Loan         1178         Email - Work           Loan         EFII104         Emolouse & defease line, 1           Contact Groups (comma delimited)         Tortext Groups (comma delimited)	Cose Date  1240 Email  1178 Enail - Work  EEC1104 Emolouse Address Line 1  ps (comma delimited)  Search  C 2	Loan Close Date Loan 1240 Email Loan 1778 Email Work Loan 1778 Email Work Loan EED104 Emolouse Address Lose 1 Contact Groups (contrad delimited) Clent Clent Search Clent Clen
Loan         1240         Email           Loan         1178         Email - Work           Loan         SE0.104         Emolouse: Address Line. 1           Contact Groups (comma delimited)         Emolouse: Address Line. 1	1240     Email       1178     Email - Work       EE0104     Emolouse: Address: Line, 1       ps (comma delimited)     Search	Loan 1240 Enal Loan 1178 Email Loan 1178 Email Contact Groups (comma delimited) Contact Groups (comma delimited) Centra Groups (comma delimited) Custom Relds Search C
Loan         1178         Email - Work           Loan         EE0104         Emolouse Address Line 1           Contact Groups (comma delimited)         Contact Groups (comma delimited)	1178 Email - Work EED104 Emolouer Address Line 1 ps (comma delimited) Search O	Loan 1178 Email-Work Loan EE0104 Emolouer Address Line 1 Contact Groups (comma delimited) Clent Custom Fields Search O
Laza EE0104 Emolouer Addeere Lioa 1 Contact Groups (comma delimited)	SEATURA Employee Address Line 1 ps (comma delimited) Search Search	Lean EE0104 Emolouer Addrees Line 1 Contact Groups (comma delimited) Clent Custom Fields Search O 2
Contact Groups (comma delimited)	search Search	Contact Groups (comma delimited) Clent Custom Relds Search 💽 🕑
	Search 💽 🕑 📝	Clent Custom Relds
Client		Custom Fields Search 🖸 🖓
Cirent		
Custom Fields Search 🕒		Sync Type Field ID TE Display Name Encompass Description
Sync Type Reld ID TE Display Name Encompass Description	Field ID TE Display Name Encompass Description	

#### 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.

Display Name	Borrower		System Name borrower
Standard Fields			Search phone 2
Sync Type	Field ID	TE Display Name	Encompass Description
Loan	1490	Phone - Cell	
Loan	66	Phone - Home	
Loan	FE0117	Phone - Office	

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.

ББ F			- • ×	
L	Sync Type	Loan	~	I
II.	Pair Index		$\sim$	I
II.	Encompass Field ID	1490	Q	I
н.	Description			4
m	TE Display Name	Phone - Cell		ł
Η			Accept Cancel	l
		Search	F	1

#### 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.

Display Name	Borrower		System Name Search	borrower	
Standard Fields					
Sync Type	Field ID		TE Display Name	Encompass Description	
Loan	2024		Source		
Loan	4000		First Name		
Loan	4002		Last Name		
Loan	FR0104		Address Line 1	Borr Present Addr	
Loan	URLA.X175		Address Line 2		
Loan	1402		Birthday		
Loan	FR0106		City	Borr Present City	
Loan			Close Date		
Loan	1240		Email		
Loan	1178		Email - Work		
Loan	EE0104		Employer Address Line 1	1	
Client Custom Fields	(comma delimited)	,	Search		• •
Sync Type	Field ID	TE Display Name	Encompass Description		

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.

Search	0	2	>
TE Display Name Encompass Description			

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.

<b>^</b> -					-		×
🔷 То	talEx	pert	Edit	Partici	pant		
Display Name B	orrower		System Name	borrower			
Standard Fields			Search phone				Z
Sync Type	Field ID	TE Display Name	Encompass Description				
Loan	1490	Phone - Cell					
Loan	66	Phone - Home					
Loan	FE0117	Phone - Office					
Contact Groups (c	omma delimited)						
Contact Groups (c Client	omma delimited)						
	omma delimited)	_					
Client	omma delimited)		Search			•	3 >
	omma delimited) Field ID	TE Display Name	Search Encompass Description			•	3 >
Client Custom Fields						•	3 >
Client Custom Fields Sync Type	Field ID	TE Display Name	Encompass Description			0	8 >
Client Custom Fields Sync Type	Field ID	TE Display Name	Encompass Description			•	3 >
Client Custom Fields Sync Type	Field ID	TE Display Name	Encompass Description			•	8 >
Client Custom Fields Sync Type	Field ID	TE Display Name	Encompass Description			•	8 >
Client Custom Fields Sync Type	Field ID	TE Display Name	Encompass Description			•	3 >
Client Custom Fields Sync Type	Field ID	TE Display Name	Encompass Description			0	3 >

#### 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.

Custom Participant	\$	Search	0 🖉 🗙
Display Name	System Name		

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

TotalExpert	- • × - Add Participant
Select Which Participant to Add	Accept Cancel

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.

	elds Loan F					Luan Juliuses	Louirraposes	Loan types	Sync		
Modify Relat	led User	rs Detai	IS.								
Owner Details Total Expert Ide	-	<b>F</b>	Deld								
External ID	ntrier	LOID	ass Field			Q					
External ID	•	LOID				\$					
Assignee											
Loan Participant	Total E	xpert Identifi	er En	compass	Field						_
Attomey	External	ld									
Borrower	External	ld	LOI	D							
Buyer's Agent	External	ld									
Co-Borrower	External	ld									
Seller's Agent	External	ld									
Settlement Agent	External	ld									
Related Users	_		_	_	_	_	_	_	_	0	2
Total Expert Identi	ifier En	compass Fie	ld					Loan Par	ticipant	User F	_
d	LOI							Borrower		proces	sor
								Dononici		process	

#### **Owner Details**

By default, the utility maps the Encompass LOID field to the External ID field in the Total Expert Identifier dropdown 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.

hanges	
	Current Password Password must:
Cost Center	be a minimum of 8 characters long     contains 1 lowercase character
	New Password Scottains 1 upper case character Scottain 1 number Scottain 1 number
Location Number	© Contain 1 Special Character
	Confirm Password
	©
	3rd Party Source Settings
	Username (letters, numbers, or dashes
	only)

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

TotalExpert	Search all contacts 🔍 🕂 💊 🏥 🕢 🎗 🌲 🕑 Mike 🗸
🕄 Save Changes	
	Current Password Password must: © be a minimum of 8 characters long © Current Password must:
Cost Center	New Password
Location Number	© contain 1 special character
	Confirm Password
	۲
	3rd Party Source Settings
	Username (letters, numbers, or dashes only)
	External ID admin

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

TotalExpert	Search all contacts Q + S III @ & A A Mike ~
🔂 Save Changes	
Profile	Contact Information
First Name * Mike	Email * (Used for notifications and

### 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.

iotal tem		- □ × Edit Related User
tem tem tem	Loan Participant Borrower	
tem tem	Total Expert Identifier Encompass Field External ID V LOID	Q
En	compass Field	Accept Cancel

### **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.

Total	Expert	Edit Re Use		
m Total Expert Identifier m ID ~	Encompass Field LOID		Q	F
m Loan Participant m Borrower		~		F
m User Role processor		~		h
Loan Officer Assistant processor				
t Lu		Accept	Cancel	artic

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.

ស្នាំ Compliance 🗸	Save Settings			
🕈 Organization Admin 🛛 ^				
Users	Loan Types	Add Type	Loan Statuses	Add Status
Groups	Туре	Delete	Status	Delete
Teams	Conventional		Started	
User Roles	contentional		• Stanted	
Marketing Settings	Conventional Fixed Rate		• <b>‡</b> Pending	
Organization Settings	FarmersHomeAdministration			
Organization Contact Groups	FHA		+ Submittal	
Loan & Product Participant Roles	HELOC		Cond. Approval	8
Password Settings	Other	0	Resubmittal	
User Interface Settings	USDA-RHS	<b></b>	4 Approval	<b>m</b>
Loan Settings				
Custom Fields	VA	Ū.	Ready for Docs	
Data Importer			Docs Out	

### 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.

0		
PI Creds Loan Fields Loan Participants Related Users	Loan Programs Loan Statuses Loan Purposes Loan Types Sync	
Create mappings for Loan Programs.		
	Search	
Encompass Field Value	Total Expert Field Value	
5/1 ARM	5/1 ARM	
Construction Loan	Conventional Fixed	
Conventional Fixed	Conventional Fixed	
FHA Fixed Rate	FHA Fixed Rate	
Interest Only 5/1 ARM		
USDA Rural Development		
VA Fixed Rate		
VA IRRRL		

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.

PI Creds Loan Fields Loan Participants Related Users Loan Program	s Loan Statuses Loan Purposes Loan Types Sync	
Create mappings for Loan Statuses. Use a Custom Rield Log MS LastCompleted Use Missiones	Search	
Encompass Field Value	Total Expert Field Value	
Started	Started	
Processing	Processing	,
Submittal	Submittal	1,
Cond. Approval	Approval	1,
Resubmittal		,
Approval	Approval	1,
Ready for Docs		1
Docs Out		Ţ
Funding	Funding	Ţ
Shipping	Shipping	Ī
Purchasing	Funding	Ţ
Construction Submittal		1
Completion		1
Example 1		•
Example2		•
Example3		•

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 <u>HERE</u> for custom fields and <u>HERE</u> for business rules.

Create mappings for Loan Statuses.	
Use a Custom Field Log.MS.LastCompleted	Search
Encompass Field Value	Total Expert Field Value
Started	Processing
Processing	
Submittal	
Cond. Approval	
Resubmittal	
Approval	
Ready for Docs	
Docs Out	
Funding	
Shipping	
Purchasing	
Construction Submittal	
Completion	
Example 1	
Example2	
Example 3	

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.

lotali	Expert		Admi	in Set	ttings	6	
PI Creds Loan Fields L	oan Participants Relate	d Users Loan Programs	Loan Statuses	Loan Purposes	Loan Types	Sync	
Create mappings	for Loan Purpo	SØS.	Search				
Encompass Field Value			Total Expert Field	d Value			
Construction To Permanent			Construction - Per	m			
NoCash-Out Refinance			Refinance				
Purchase			Purchase				
ConstructionOnly							
Cash-Out Refinance			Refinance				
Other							

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.

Search	
Other	
	Total Expert Field Value Conventional VA FHA Other HELOC

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.

					Admin Settings					
API Creds	Loan Fields	Loan Participants	Related Users	Loan Programs	Loan Statuses	Loan Purposes	Loan Types	Sync		
	Sync Users	i i								
	Sync Loans	i								
Pu	ush To Encom	pass								

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).

	Encompass User	Exists in Total Expert	Last Synced	Role Name		Status
	Accounting User	No			$\sim$	
]	Admin User	Yes	3/29/2023 12:42 PM	Admin	~	$\checkmark$
ן	Api User Api User	No			$\sim$	
ן	Api User2	No			$\sim$	
]	Closer User	No			$\sim$	
]	Funder User	No			$\sim$	
]	Kensie Mae	Yes	2/14/2023 3:40 AM	Loan Officer Assistant (Not Licensed)	$\sim$	
]	Lock Desk User	No			$\sim$	
]	Mark Wick	No			$\sim$	
]	Nesrin Charif	Yes	3/28/2023 4:05 PM	Loan Officer	$\sim$	$\checkmark$
]	Officer User	Yes	2/14/2023 3:36 AM	Loan Officer	$\sim$	$\checkmark$
]	Officer User3	Yes	3/31/2023 4:21 PM	Loan Officer	$\sim$	$\checkmark$
]	Post Closer User	No			$\sim$	
]	Processor User	No			$\sim$	
]	UAT User	Yes	3/7/2023 9:55 PM	Loan Officer	$\sim$	$\checkmark$
]	Underwriter User	No			$\sim$	

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**  $\rightarrow$  **User Roles**.

	×		Search all contacts	🔍 🕂 🏭 🛛 🎗 🌔 Super Admin
\$ <sup>1</sup>	Manage Marketing 🔷		id Role	Search Role or Organization Name
<u>ة</u> [5	Compliance 🗸 🗸		10 KONE	Search Role or Organization Name
¢°	Organization Admin	. •	Name *	Organization Name 🗢
			Admin	KensieMae
		0	API Admin	KensieMae
	Teams		Loan Officer	KensieMae
	User Roles			
	Marketing Settings		Loan Officer Assistant (Licensed)	KensleMae
	Organization Settings		Loan Officer Assistant (Not Licensed)	KensieMae
	Organization Contact Groups	•	Marketing	KensieMae

- 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.

	Encompass User	Exists in Total Expert	Last Synced	Role Name	-	Status
1	Accounting User	No			$\sim$	
5	Admin User	Yes	3/29/2023 12:42 PM	Admin	~	
וכ	Api User Api User	No			~	
וכ	Api User2	No			~	
5	Closer User	No			~	
וב	Funder User	No			~	
2	Jay Famer	Yes	4/2/2023 2:50 PM	Loan Officer	$\sim$	
וכ	Kensie Mae	Yes	2/14/2023 3:40 AM	Loan Officer Assistant (Not Licensed)	~	
וכ	Lock Desk User	No			~	
וב	Mark Wick	No			$\sim$	
וב	Nesrin Charif	Yes	3/28/2023 4:05 PM	Loan Officer	$\sim$	$\checkmark$
וב	Officer User	Yes	2/14/2023 3:36 AM	Loan Officer	$\sim$	$\checkmark$
ו	Officer User3	Yes	3/31/2023 4:21 PM	Loan Officer	$\sim$	$\checkmark$
ו	Post Closer User	No			$\sim$	
ו	Processor User	No			$\sim$	
	UAT User	Yes	3/7/2023 9:55 PM	Loan Officer	$\sim$	$\checkmark$
7	Underwriter User	No			$\sim$	

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 <u>HERE</u>.

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

User Details			≡	TotalExper	t	Search all contacts		२ + 🛙 🗰	0 2	Super Admin 🗸
Account Information	Disable Login 🔲 Disable Account	Public Pr								
* User ID	ifamer		_	🖹 Save User 🛛 🐣 Back To	Users					
<ul> <li>Password</li> </ul>		Restrict								
<ul> <li>Re-type Password</li> </ul>			ŧ'n	Account Settings	Email Settings	I Marketing Profile	A MUS/IF	X settings 👘 Disclaime		
	Force user to change password		TA	Account Settings	a Emair Settings	marketing Prome	MES/IE	A settings	15	
* First Name	Jay		<b>S</b>							
Middle Name			~	Profile				Contact Informat	tion	
* Last Name	Famer									
Suffix										
Job Title	Senior LO		E.	First Name *	Jay			Email*	jay@totalexpert.co	m
Employee ID Number										
Phone Number	402-345-6124		$\odot$	Last Name *	Farner			Confirm Email *	jay@totalexpert.co	m
Cell Phone Number	402-308-5456		Ļ	Last Hume	- Control			commentati	Juyeroutexperceo	
Fax Number	402-345-6125		**							
* Email	jay@totalexpert.com		<b>L</b> <sup>8</sup> +	Select the user's	Loan Officer	~		Office	402-345-6124	
CHUM			_	role*						
Working Folder	<adverse loans=""> ~</adverse>		<b>₽</b>							
NMLS Loan Originator ID				User Status*	Active	~	•	Fax	402-345-6125	
NMLS Expiration Date	~		÷							
		_	æ					Mobile	402-308-5456	
Loan Officer Active Licer		2		Website (Full URL required						
	e Number	End Date	1	ex. http://example.com/)						
Minnesota 456213 Nebraska 465312		_	_					Cell Service Carrier (required for text	Please Select	*
403012	-			Commentation		0.10		(required for text notifications)		ibilities with their internal
				Company Name	Demo Account - CS	U #6				sponding to a lead routing ad will not work with AT&T or
LO Comp Plan Details			ц.						any carrier that uses AT	&T networks. Sorry for the
Name				Job Title	Senior LO				inconvenience.	
Start Date			*							
Min Term # Days			æ							
% Amount				Testimonial Website				Notification Sett	ings	
\$ Amount			<u> 4</u> 4	(Full URL required ex. http://example.com/)					-	
Minimum \$										
Maximum \$			۵°					Receive Text Message	No	~
								Load Notifications?		

User Details			TotalExpert	Search all contacts Q +	- III 🔞 🙁 📳 Super Admin 🗸
Account Information	Disable Login Disable Account	Public Pr			
* User ID	famer		🗈 Save User 🏾 🐣 Back To Users		
<ul> <li>Password</li> </ul>		Restrict			
<ul> <li>Re-type Password</li> </ul>			Account Settings Email Settings	Marketing Profile	laimers
	Force user to change password	10		and the second	
<ul> <li>First Name</li> </ul>	Jay	٩			
Middle Name			Disclaimers		+ Add New Disclaimer
* Last Name	Famer				
Suffix	Senior LO		100 -		Search
Job Title		Ë			
Employee ID Number	402-345-6124		ID 🔷 Name 🗢	Type 🌐	Edit 🗢 Delete 🗢
Cell Phone Number	402-308-5456	1			
Fax Number	402-345-6125	- L+	736201 NE	License Number	e 🗊
* Email	jay@totalexpert.com	-			
CHUM		- <b>C</b> *	736202 MN	License Number	e 🗊
Working Folder	<adverse loans=""></adverse>				
NMLS Loan Originat	or ID		Showing 1 to 2 of 2 entries		Previous 1 Next
NMLS Expiration Da	te	<b></b>			
Loan Officer Active	Licenses (2)	2			
	cense Number	End Date			
	6213 5312				
Neulaska 40	3512	6			
L					

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
-	

Organization De Name Address Unit Type City State Phone Fax	talis Demo Account - CSO #5 4155 Hopyard Road, Suite 200 Pleasariton CA Zp 94588 925-227-7000	Select Offer. Or nestificted AcCess (Login supported via SS) Updates made to SSO Access settings wi License Use Custom Lender Profile for ECS Lender Type State Bark (STB) Home State AR The interest rat My Company winkers to not apply interest rate ecopy	••• ••• •••	(Full URL required es. http://example.com/ Company Name		Q + E	Image: Select       Note: Do to incompatibilities with their internal messaging system, responding to laked cuting message to accept a lead with one with NAT or or other sensage to accept a lead with one with NAT or other sensage to accept a lead with one with NAT or other sensage to accept a lead with one with NAT or other sensage to accept a lead with one with NAT or other sensage to accept a lead with one with NAT or other sensage to accept a lead with one with NAT or other sensage to accept a lead with one with NAT or other sensage to accept a lead with one with NAT or other sensage to accept a lead with one with NAT or other sensage to accept a lead with one with NAT or other sensage to accept a lead with one with NAT or other sensage to accept a lead with one with their sensage to accept a lead with one with their sensage to accept a lead with one with their sensage to accept a lead with one with their sensage to accept a lead with one with their sensage to accept a lead with one with their sensage to accept a lead with one with their sensage to accept a lead with one with their sensage to accept a lead with one with their sensage to accept a lead with one with their sensage to accept a lead with one with their sensage to accept a lead with one with their sensage to accept a lead with one with their sensage to accept a lead with one with their sensage to accept a lead with one with their sensage to accept a lead with their sensage to accept a lead with one with their sensage to accept a lead with one with their sensage to accept a lead with one with their sensage to accept a lead with one with their sensage to accept a lead with one with their sensage to accept a lead with their sensage to accept a lead with one with their sensage to accept a lead with one with their sensage to accept a lead withe lead with a lead with their sens with their sens with their sens
D.B.A.	Add More	License Type in All States Select Exempt State License Type Li AK Mortgage Broker	<b>⊗</b> ₿	Job Title	Senior LO		message to accept a read will not work with A kit of any carrier that uses AT&T networks. Sony for the inconvenience.
NML S	Use Parent Info	AK Mottgage Locker	© پ	Testimonial Website (Full URL required ex. http://example.com/)		Notification Set	tings
NMLS		Statutory Election in Maryland	다			Receive Text Message	No
MERS MIN	Use Parent Info	No Statutory Election	<b>€</b>	Address		Lead Notifications?	
MERS MIN		Credit Grantor Law Election (for All Loans)				Receive Daily Email	No
Legal Entity le		Credit Grantor Law Election (for 1-4 unit, Jr. Lien 0     Credit Grantor Law Election (for 1-4 unit only)	e B	Address	4155 Hopyard Road, Suite 200	Digest?	
HMDA Profile		ATR/QM				Receive Co-Marketed	No
LEI		Small Creditor Exempt Creditor	£	Address 2		New Listing Alerts?	
Consumer Co	unnect LO Search Use Parent Info	Exempt Creditor	•				
	nization in LO Search	Consumer Connect Site	~	City	Pleasanton	Receive Co-Marketed Pending Listing	No
Name		Site URL	म्			Alerts?	
			*	State	California 🗸		
LO Comp Pla	n Details	Assigned Compensation Plans (0)	æ			Receive Email New Task Notifications?	Yes 🗸
Name		Plan Name		Zip	94588		
Start Date			থাত			Receive Email Lead	Yes 🗸
Min Term # Da	ys		o°	Timezone	Central 🗸	Notifications?	
<li>2 Learn more</li>						Device Dist 5 1	
	Organization Details	that will populate Total Expert (F				Receive Print Order	Yes 🗸

When users are synced or updated from Encompass to Total Expert, those users can navigate to <u>https://www.totalexpert.net</u>, 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.

<b>\$</b>	Tota	Exper	ť		Adm	in Set	tting	8	
API Creds	Loan Fields Sync Users Sync Loans		Related Users	Loan Programs	Loan Statuses	Loan Purposes	Loan Types	Sync	
Pu	ish To Encom								

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.

TotalExpert				Sync Loans
Your Data Mapping must be comp	leted bef	or	re you mag	y export Encompass files to Total Expert
Date Range: 4/ 2/2023 • 4/ 2/2023 • Select the Created dates of the loan files you wish to i	mport to Total	Ехр	opert	
Users:			Loar	n Folders:
Full Name	User ID	^	<b>ヽ</b>   ☑	Folder Name
Accounting User	accounting			Employee Loans
Admin User	admin			Adverse Loans
Api User Api User	apiuser			Pipeline
Api User2	apiuser2			Training
Closer User	closer			Completed Loans
Funder User	funder			(Archive)
Jay Famer	jfamer			
Kensie Mae	kensiemae			
Lock Desk User	lockdesk			
Mark Wick	mark.wick			
Nesrin Charif	nesrin.charif			
Officer User	officer			
Officer User3	officer3			
Select the users whose loan files you wish to import to	Total Expert		Selec	t the loan folders of the loan files you wish to import to Total Expert
Only Sync Loans That Have Never Been Synced Sync Selected				Cancel

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.

- (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.

Sele	18/2021	wish to import to Total	Expert	
Jse	ns:			Loan Folders:
	Full Name	User ID	^	Folder Name
	Accounting User	accounting		Employee Loans
	Admin User	admin		Adverse Loans
	Api User Api User	apiuser		Pipeline
	Api User2	apiuser2		Training
	Closer User	closer		Completed Loans
	Funder User	funder		(Archive)
	Jay Famer	jfamer		
	Kensie Mae	kensiemae		
	Lock Desk User	lockdesk		
	Mark Wick	mark.wick		
	Nesrin Charif	nesrin.charif		
	Officer User	officer		
	Officer User3	officer3		

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.

Loan Number	Created Date	Loan Officer	Loan Folder		
TEST230400109	4/2/2023 8:30:00 AM	famer	Pipeline		

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.

		be completed before	you may exp	on Encompa	155 11105 10 1		port
	Range:	-					
	2/2023						
Select	t the Created dates of the loan file	es you wish to import to Total Expert					
Jsen	5:		Loan Folde	rs:			
	Full Name	User ID ^	Folder	Name			
	Accounting User						
	Admin User	1		×			
	Api User Api User	Total Expert Int	egration	×			
	Api User2	Sendi					
	Closer User		ans sent successf	ulle			
D F	Funder User		and sent succession	any:			
	lay Famer						
	Kensie Mae	k	O	ĸ			
	Lock Desk User	lockgesk		_			
	Mark Wick	mark.wick					
	Nesrin Charif	nesrin.charif					
	Officer User	officer					
	Officer User3	officer3					
elect	the users whose loan files you w	ish to import to Total Expert	Select the loa	an folders of the loan	i files you wish to in	port to Tota	Exper

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

	Error Message	
EST230400109	Unable to find target for relationship: 'owner'	

## 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",
```

```
OTAL EXPERT.
```

```
"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.

Error Log	
Message: An error occurred while communicating with the server: The remote server returned an error: (422) Unprocessable Entity.	~
Status Code : 422	
Status Description : Unprocessable EntityResponse body: {"error":"Unable to find target for	
relationship: 'owner'"}	
Jser: Admin User	
DateTime: 4/2/2023 10:59:27 AM	
<pre>{essage: An error occurred while communicating with the server:</pre>	
The remote server returned an error: (422) Unprocessable Entity.	
Status Code : 422	
Status Description : Unprocessable EntityResponse body: {"error":"Unable to find target for	
relationship: 'owner'") Jser: Admin User	
JateTime: 4/2/2023 10:59:01 AM	
ACCELLE: 1/2/2023 10:35:01 AP	
	×

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 <u>HERE</u>.

## **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 <u>HERE</u>.

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

	×	TotalExpert	Search all contacts Q   +   III   @   2. (C) Super Admin ~
لتظ	lasks 👻		
	Campaigns 🗸 🗸	Outbound Data Connector	Create New Connector
Ļ	Journeys		
C*	Lead Capture Apps		
٨	Print Marketing 🔨	Encompass <sup>®</sup> On O	
<b>£</b>	Web Marketing 🔨 🗸	ENTITY LAST RUN LAST RUN	
Æ	Email Marketing 🛛 🗸	TYPE TIME STATUS Contact 4/2/23 - Success	
1	Import Data	10:30 AM	
4	Outbound Data Connector		
ъ	Reporting & Analytics 🛛 🗡	Edit	
*	Manage Teams		
<b>\$</b>	Manage Marketing 🛛 🗸		

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:	Entity Type:	
Encompass®	Contacts	~
ole Access: Automated Data Push	Role Access: Manual Data Push	
Marketing X Loan Officer X Admin X	Loan Officer X Marketing X Admin X	~
pplies this connector to all users with the selected role(s).	Selected user role(s) will have permission to manually push data	1.
Automation Sync:		
On creation On deletion On update		
On creation On deletion On update		
On creation On deletion On update		0
On creation On deletion On update .eave all options unchecked if a journey event will trigger this connector.		<b>O</b>

- 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.

	>	Con

> Connector Basics		0
✓ Authentication		0
Authentication Type:		
None	~	
Next		
> Data Request		0
> Success Criteria		
		-

#### 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.

	lequest			<b>e</b>
URL:				
https://total	lexpert.kmthosted.com/TEBE11212509/loans			
HTTP Method:	:			
POST	~			
Additional Rec	quest Headers:			
x-km-api-ke	ey 5566526d-776 🗊 Delete			
+ Add Request	t Header			
De europe De else				
Request Body:	1			
(equest Body	c			
{ "loId": "	<pre>{{contact.owner_external_id}}",</pre>	PROPERTIES		٩
{ "loId": "	<pre>^ {{contact.owner_external_id}}", Id": "{{contact.owner_id}}",</pre>	PROPERTIES		
{ "loId": " "crmOwner "applicat {	<pre>{{contact.owner_external_id}}", Id": "{{contact.owner_id}}", ions": [</pre>	PROPERTIES	Contact - Activity Rating	Q
{ "loId": " "crmOwner	<pre>{{contact.owner_external_id}}", Id": "{{contact.owner_id}}", ions": [ ": {</pre>		Contact - Activity Rating Contact - Additional Info	
{ "loId": " "crmOwner "applicat {	<pre>{{contact.owner_external_id}}", Id": "{{contact.owner_id}}", ions": [</pre>		Contact - Additional Info	
{ "loId": " "crmOwner "applicat {	<pre>{{contact.owner_external_id}}", Id": "{{contact.owner_id}}", ions": [ ": { "firstName": "{{contact.f_name}}", "lastName": "{{contact.f_name}}",</pre>		, , ,	
{ "loId": " "crmOwner "applicat {	<pre> {{contact.owner_external_id}}", Id": "{{contact.owner_id}}", ions": [ ": {     "firstName": "{{contact.f_name}}",     "lastName": "{{contact.l_name}}",     "</pre>		Contact - Additional Info	

- URL This must be a root URL with your Encompass instance ID appended to the end, such as: <u>https://totalexpert.kmthosted.com/{{encompassInstanceID}}/loans</u>
- **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:
  - o owner external ID (used to assign the loan file)
  - o first name, last name
  - o birthday
  - o email address
  - $\circ$  work email
  - o fax

- $\diamond$
- o phone (cell, home, office)
- o address
- o city
- o state
- o ZIP code
- o 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.

> Connector Basics	0
> Authentication	0
> Data Request	0
✓ Success Criteria	0
StatusCode V Contains V 20	
Add Success Criteria	
Save & Publish Cancel	

### 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**  $\rightarrow$  **Push to Encompass**:



**OTAL EXPERT** 

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.

<b>\$</b> 1	FotalExpert		S	earch all contacts	Q	+   🏭   @   X. 🜔 Demo ~
Test	t Encompass Push Loan	Draft		C	C	Save Journey 👻 Go to Classic Journey Editor
+ Events	Events	×				Event Settings ×
Settings	Search by Name	٩	Contact Created			Push Contact
	<ul> <li>Triggers</li> <li>Start your journey with a trigger. An available when adding contacts to t</li> </ul>		Push Contact			Name Push Contact Description
	Assigned To Group	nis journey.	Push the Contact to Encomp	ass <sup>e</sup> .		vescription
	Contact Assigned	8				Occurrence Limit
	Contact Created	8				This event may occur 9999 times per contact. Edit
	Contact Related	0				Event Parameters Push Service * Encompass*
	Contact Shared	0				Encompass*
	Show All	- 1				
	> Actions					Sur Surt Surtan
	> Conditions	•				Save Event Settings

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.