Fusion: Encompass Feature and Configuration Guide

Table of Contents

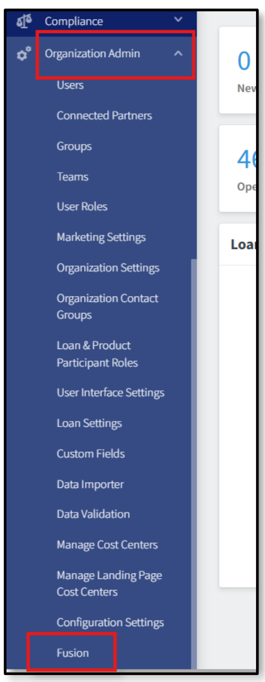
Introduction

This document serves as the configuration guide for the Total Expert Fusion integration to Encompass. A Total Expert administrator or a user with the appropriate permissions will be able to complete each of the following installation and configuration tasks, with some help from an Encompass administrator and Total Expert.

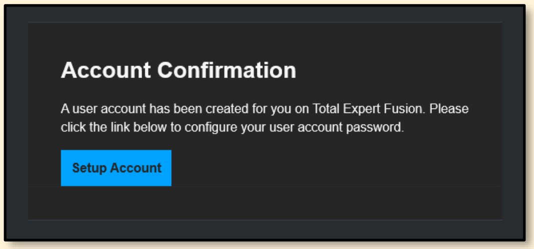
The first section covers the initial Encompass configuration for Fusion. The next section outlines the configuration of the data mapping between Total Expert and Encompass. Finally, this guide will walk you through the Total Expert troubleshooting tools as part of Fusion.

This guide is meant to walk Total Expert and Encompass administrators through configuring your organization in a SmartClient desktop environment and the Fusion interface. Total Expert can activate access to Fusion in your instance of Total Expert.

Throughout this guide, you will be instructed to navigate through Encompass and Fusion. To use the Fusion tool, you must navigate to **Organization Admin → Fusion** in Total Expert. Once in Fusion, you can navigate to the various features and functionality.



Note
The Fusion option highlighted in the navigation menu above is simply a link to the Fusion tool. You must then log in using your Fusion credentials. When you are created as a user in Fusion, you will receive an email from fusion@totalexpert.net that prompts you to set your password.



Follow the link, configure your password, then log in to complete the steps in the following sections.

Activation and Important Features

Activating Fusion

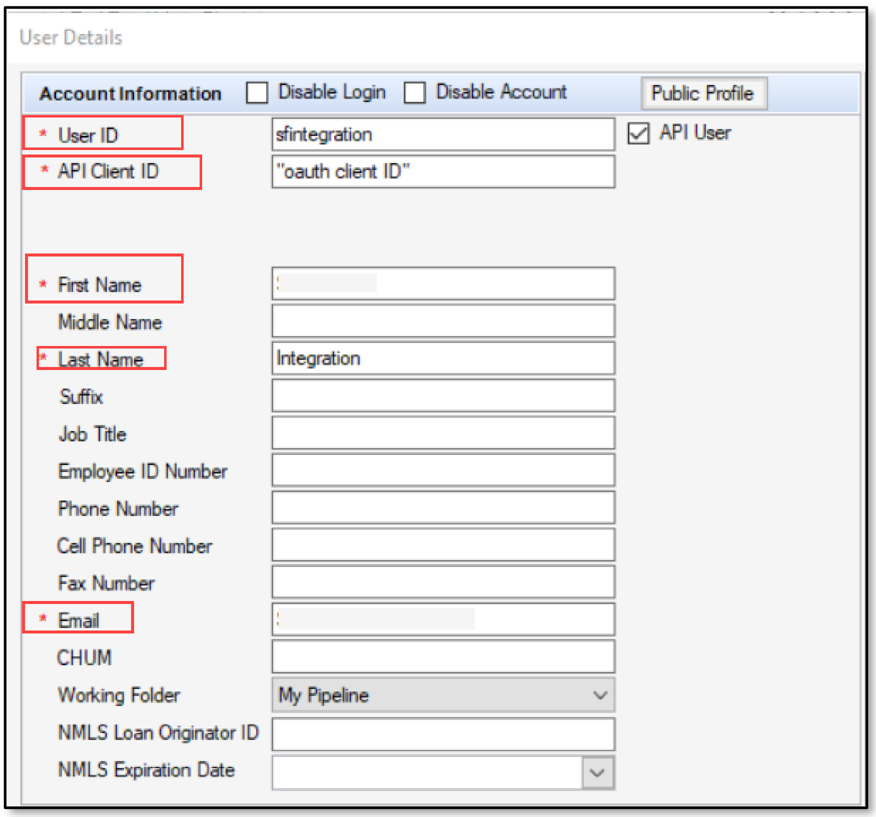
Before using Total Expert Fusion, the feature must be enabled by Total Expert for your instance, and your Encompass API Admin credentials must be configured. This requires a professional services project (SOW) and a few steps from your Encompass administration team. Before the installation, Total Expert requires:

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

Once those details are provided, Total Expert will request access to your instance via API from ICE. Once this is completed (approximately 5 business days), Total Expert will return your company's API Client ID for you to complete the following steps:

1. Create an API user in your Encompass instance. Detailed instructions for adding users in general, and API users specifically, are located here: https://help.icemortgagetechnology.com/documentation/encompass/Content/encompass/settings/Add_a_User.htm
    a. Select a folder high enough in the organizational hierarchy that provides the appropriate access to loans for the integration. This would typically be a folder just below the Administration folder or a folder for service accounts in the organizational hierarchy. After selecting the folder to house the API user, select **Add User** in the bottom right-hand corner.

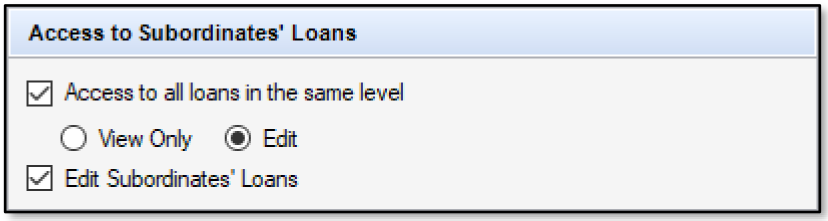
b. Note that when you check **API User** box on the User Details screen, the username and password fields are replaced with API Client ID. This is where you should enter your company's API Client ID from Total Expert. The required fields are shown here:



Note

Total Expert will never share the API client secret with you, as that is not needed in your Encompass environment but instead configured in Fusion.

c. Be sure to review the Access to Subordinates' Loans settings, which are also on the User Details screen, to ensure Total Expert will have access to the loans needed for your integration. Note that if View Only access is appropriate for your needs, you should select this here.



d. Assign a persona to your API user. The best practice here is to create a unique persona based on the existing Loan Officer persona.

  i. Go to the **Persona** section in Encompass Settings under Company/User Setup.

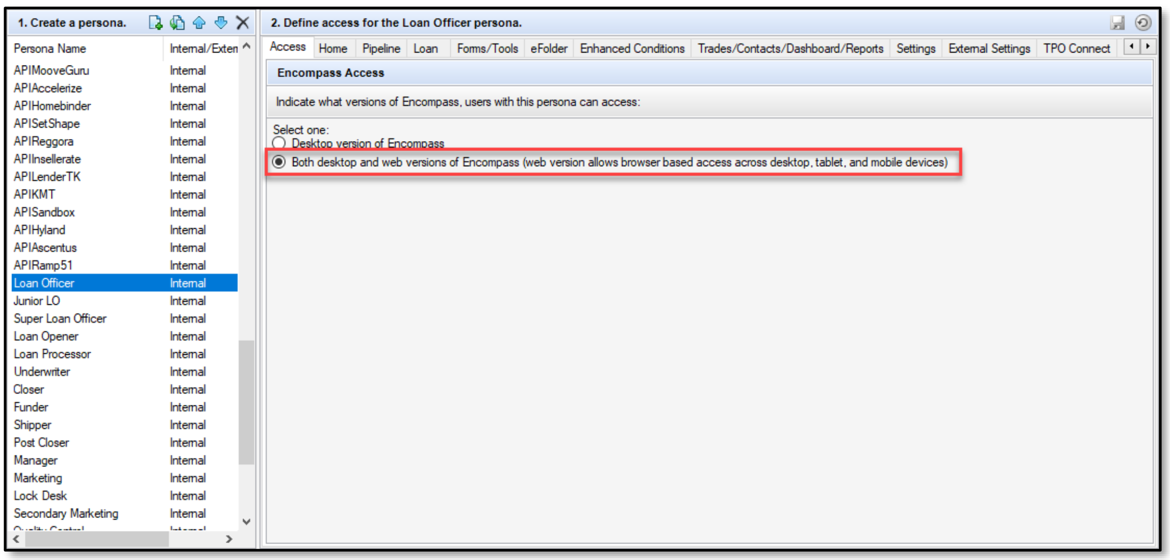
  ii. Right-click on the Loan Officer persona or Loan Opener persona and duplicate it.

  iii. Rename the persona and edit the persona permissions per the Access Areas section below.

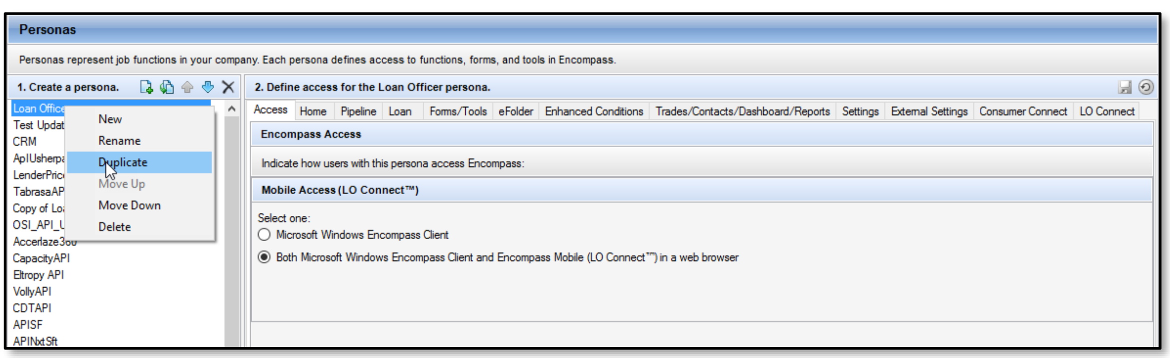
Warning

DO NOT ADD THIS PERSONA TO A LOAN OFFICER ROLE. You may later find it necessary to edit the permissions on the Loan Officer or Loan Opener personas, and doing so may adversely impact your integration if the same Persona is used for both Loan Officers/Loan Openers and your integration.

e. Ensure that the selected persona has access to Encompass Web Version and Desktop.

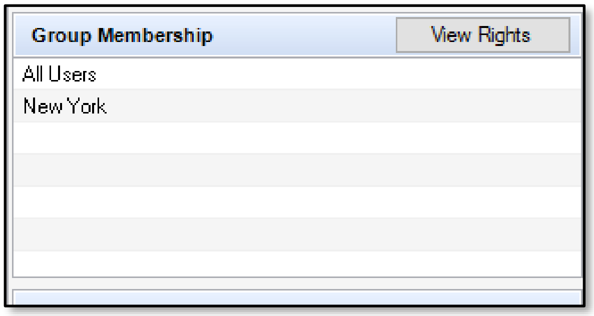


f. Right-click the persona and select **Duplicate** in the context menu.



g. Rename it to represent the Total Expert integration, for example, APITotalExpert.

h. You can also assign one or more user groups to the API user account to provide appropriate access to loan folders and other resources.



Access Areas

As part of Total Expert's integration with Encompass via Fusion, the following access areas are required to ensure robust data access, which drives desired outcomes. When creating or modifying the persona for the Total Expert API user, ensure the following are completed:

Area	Allow
Access	Both desktop and Web versions of Encompass

Pipeline	Access to Pipeline/Loan Tab
	Pipeline Tasks:
	• New Loans
	  ○ New Blank Loan
	  ○ New from Template
	Not Accessible Columns:
	• Ensure any Encompass fields that must be available in Total Expert are *not* included in this section.
	  ○ For fields needed in Total Expert for historical syncing, also ensure those fields are available in the reporting database.

Forms/Tools	All forms, including custom, to be accessible All tools
Trades/Contacts/Dashboard Reports	Access to All Contacts options
Settings	Company/User Setup • Milestones Loan Setup • Loan Folders • Loan Custom Fields • Loan Programs Contact Setup • Borrower Custom Fields • Business Custom Fields

Area	Allow
Developer Connect	Subscribe to Webhooks Enhanced Field Change

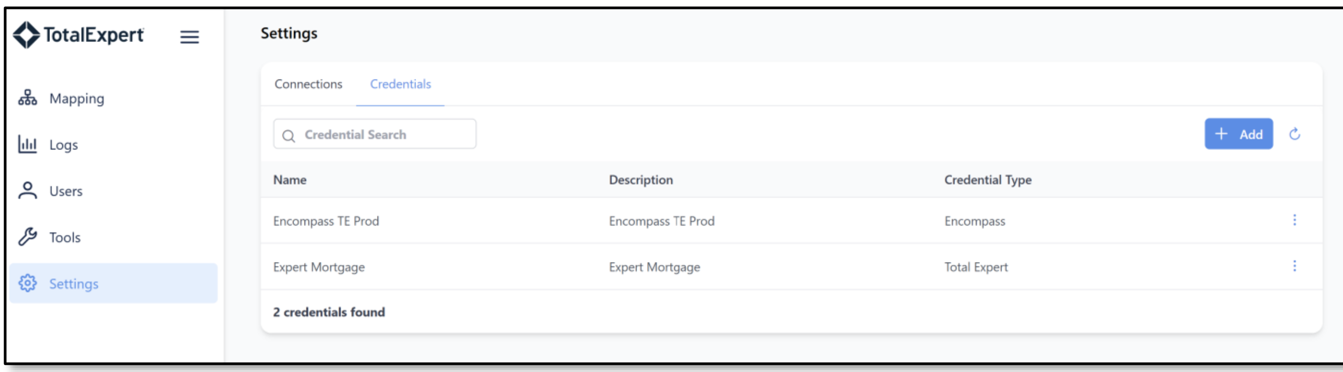
User Groups

In addition to the Total Expert API persona, you can complete additional definition of access with the User Groups Tool. With this, you can specify the access Total Expert has to specific loans, loan folders or borrower contacts.

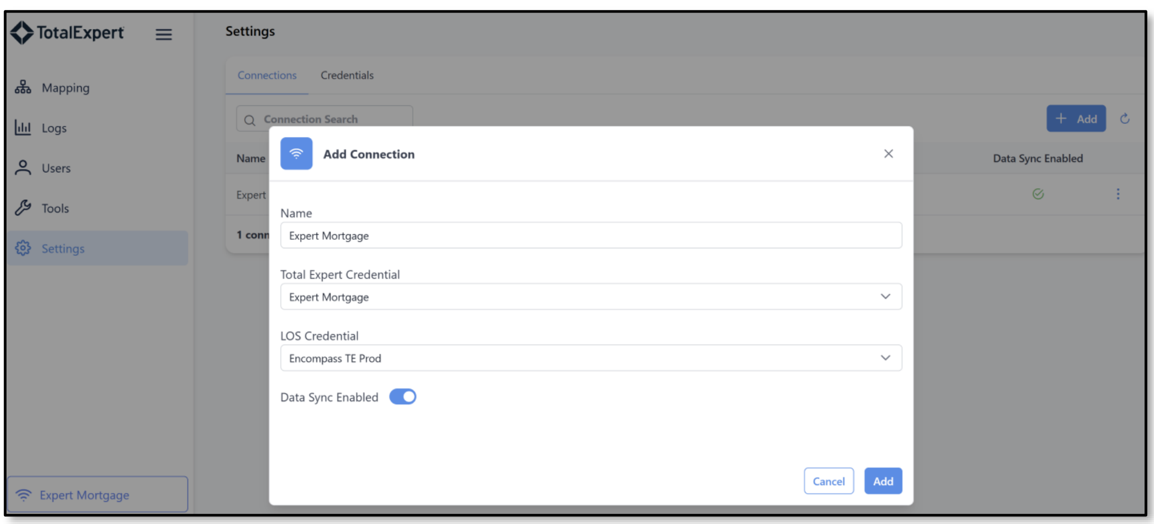
Connections

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 mappings for different loan folders, and more. To establish connections, select **Settings** in the Fusion navigation menu.

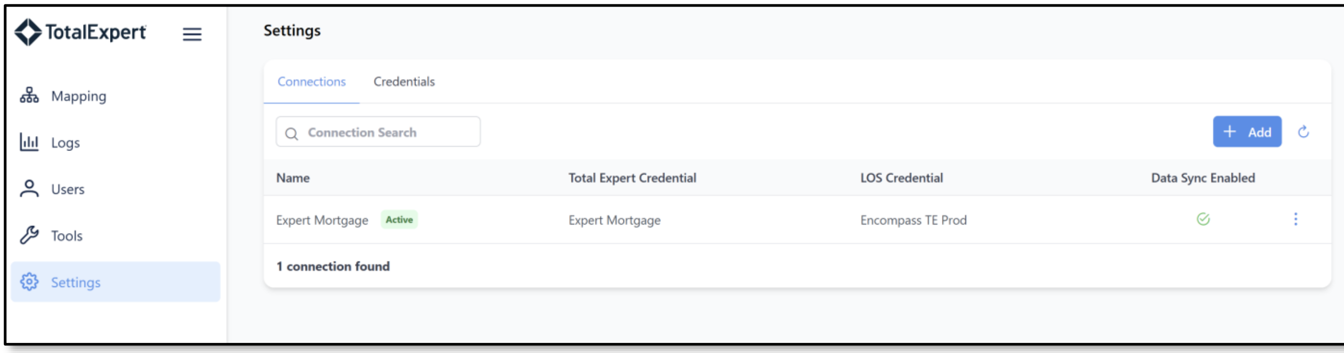
First, you must have your Encompass and Total Expert API credentials configured. A Total Expert implementation manager will complete this for you.



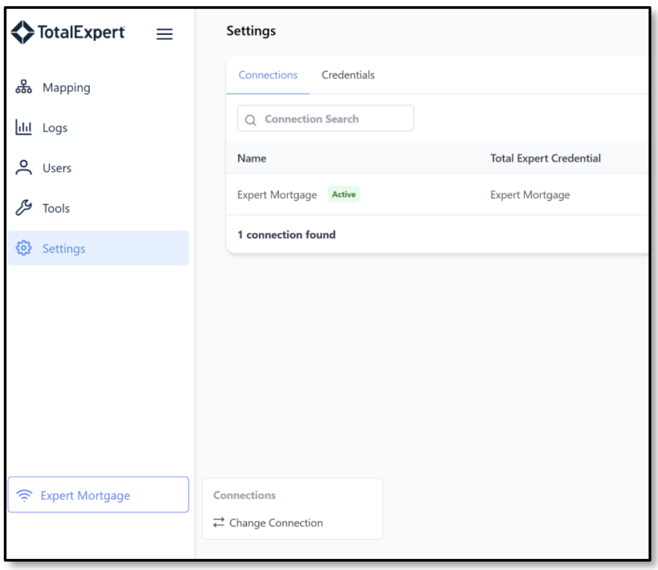
Once the credentials are appropriately configured, establish the connection between Encompass and the Total Expert instance. Additionally, you can toggle the connection by updating the **Data Sync Enabled** option:



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



As you continue with the rest of the configuration, you will be aware of the current connection you are configuring and can toggle to others in the bottom-left corner of the Settings area:



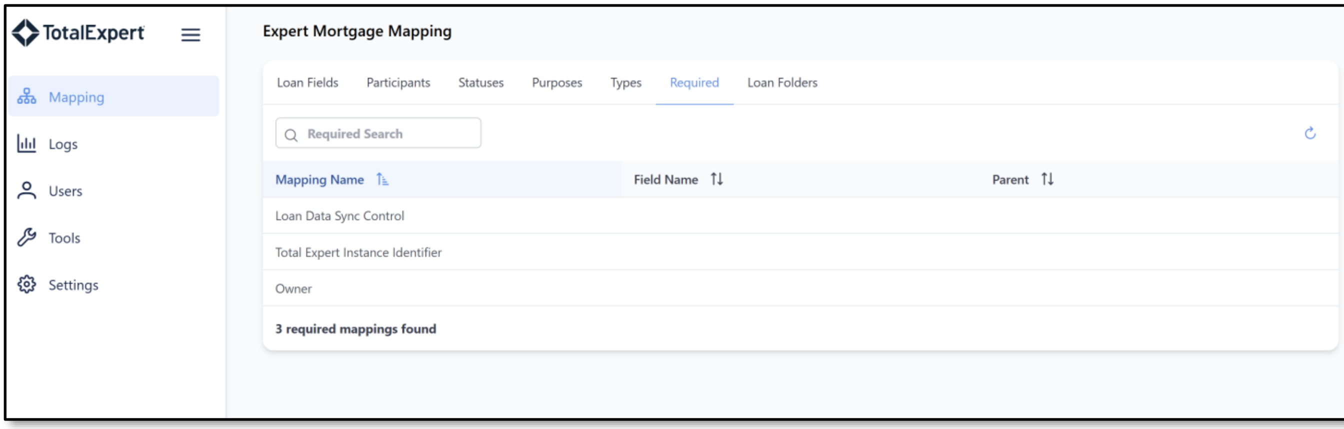
Data Sync Control

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

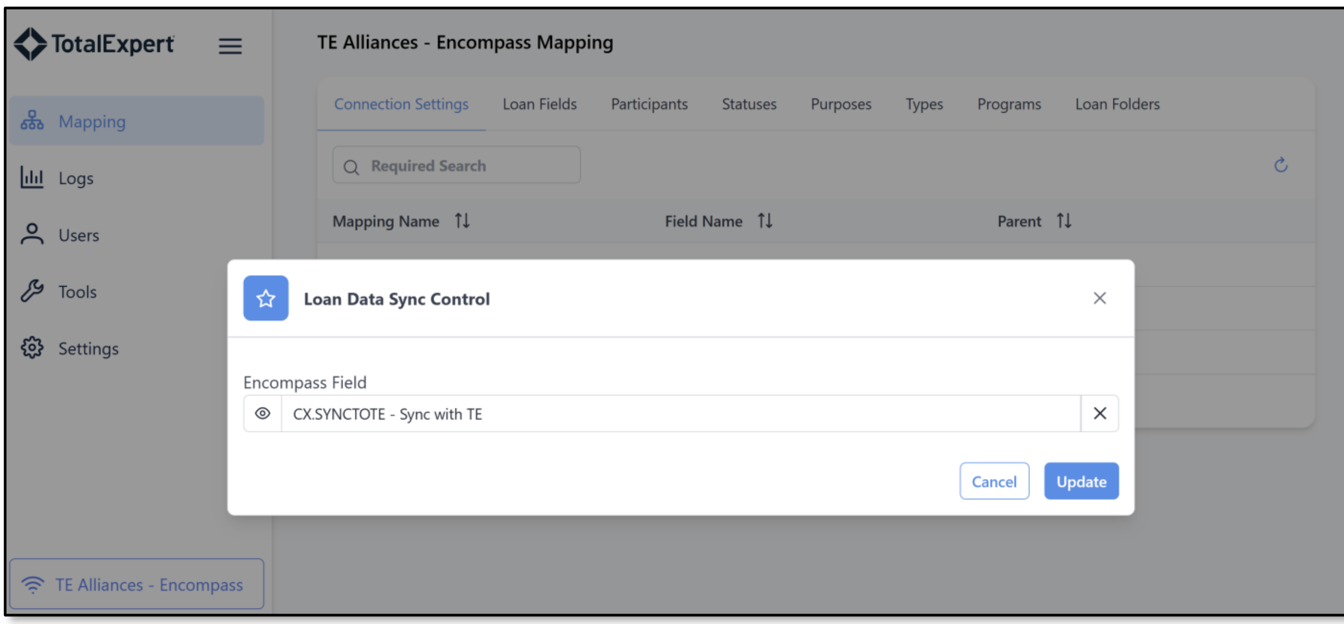
This is controlled by using a field of your choice (likely a custom field) for the loan file that you can create specifically for this feature, as well as other custom fields that you create, as participants might be unique to your instance. These custom fields must be in a Yes/No format in Encompass.

Loan Data Sync Control

In the Fusion Mapping interface under the Required tab, you have the Loan Data Sync Control option.



By configuring a field in this option, the system only attempts to send loan files with the field of your choice checked (‘X’) to Total Expert when they are created or updated. If this feature is not configured, every loan file will attempt to sync with Total Expert.

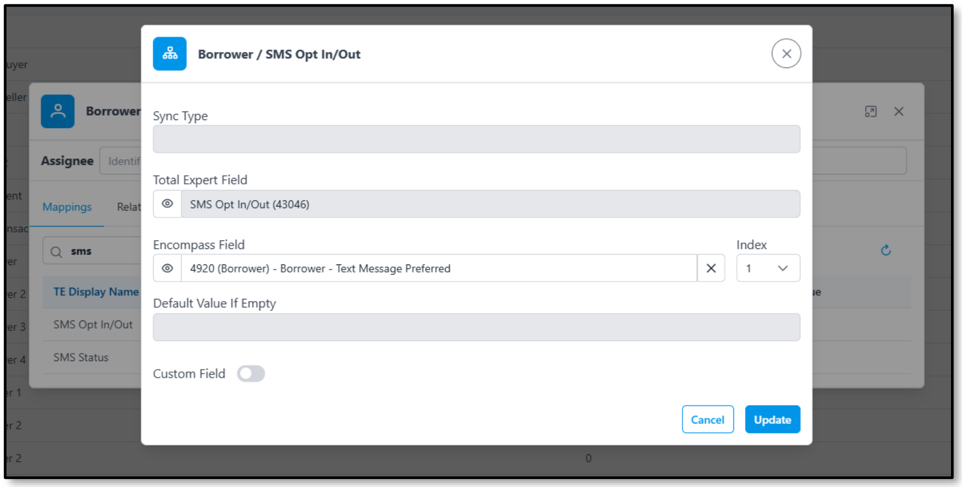


You can configure business rules in Encompass to determine when that box is checked, such as for certain loan files, users, and more. For more details on Encompass business rules, consult with your representative at ICE or refer to [the Encompass documentation].

SMS Opt-In

In the mapping interface configuration for the all participants, 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 Yes/No format field in Encompass.

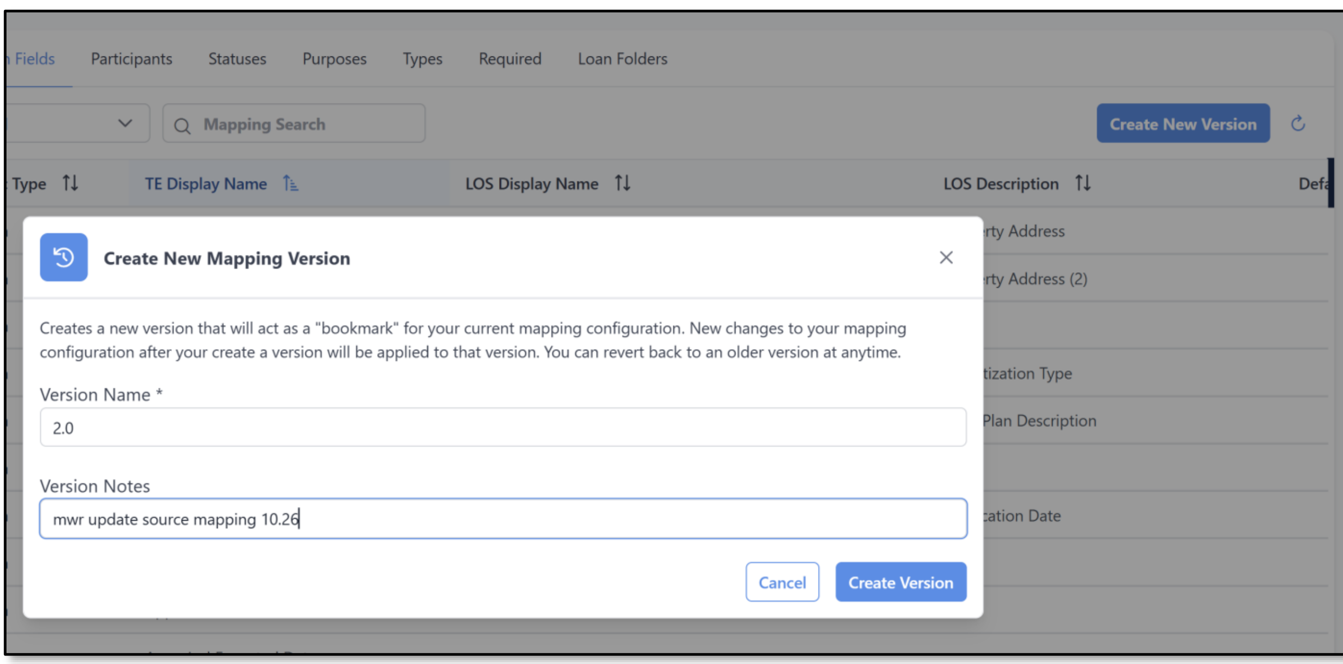


By setting up mapping to this field, if that field is checked (true) *and* a cell phone value is present, an SMS opt-in will be created for that phone number for the relevant Total Expert user. If the mapping is not completed, no SMS opt-in will be attempted.

You will likely create a custom field to map to this setting. That custom field must have a checkbox (Yes/No) format. You can configure business rules in Encompass to determine when that box is checked, such as 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 [for custom fields] and [for business rules].

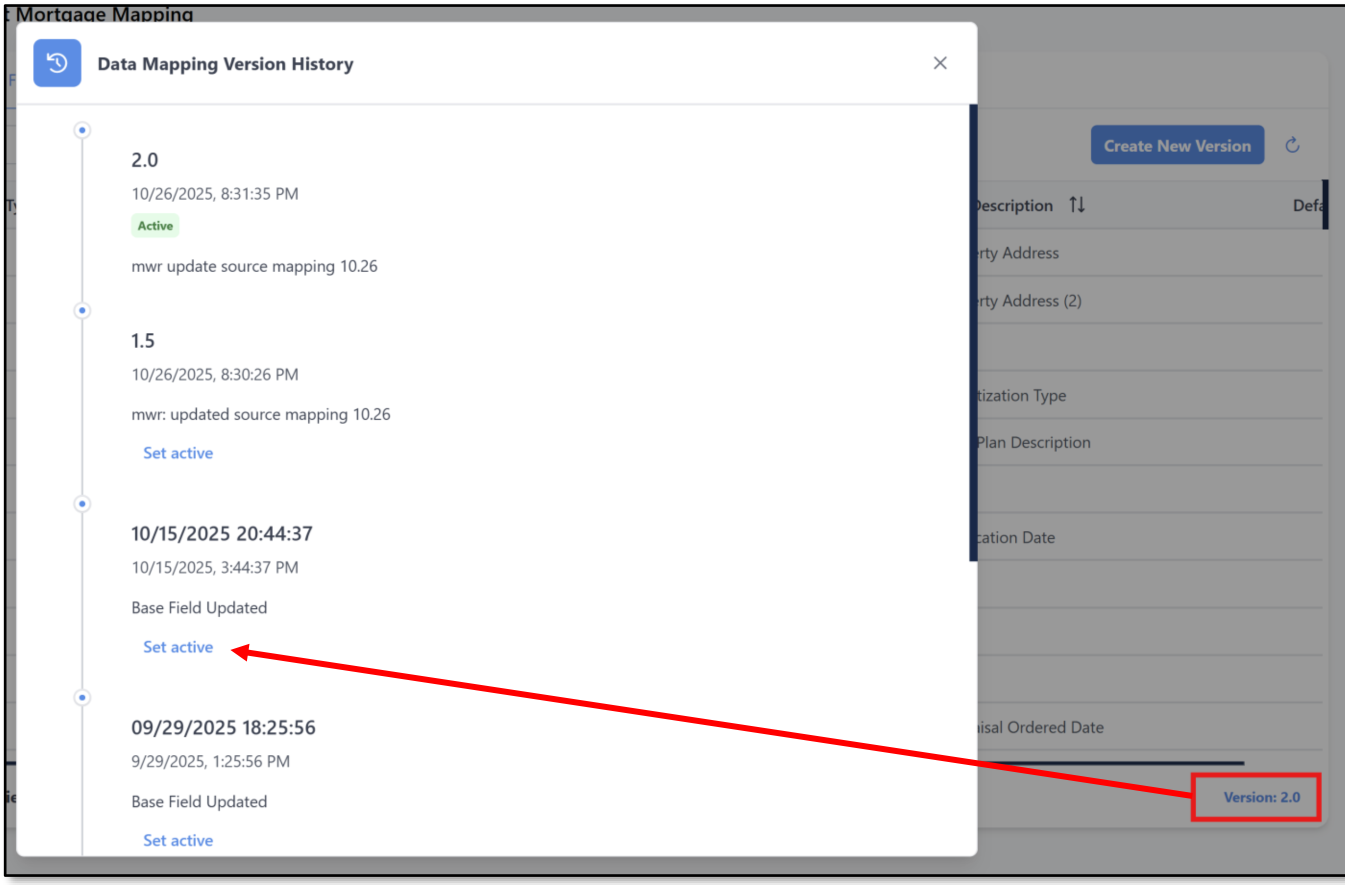
Configuration

As you complete the field mapping exercise, you can create a mapping version at any time with a name and notes. Best practice is to provide a brief summary of the changes made, who made them, and when:



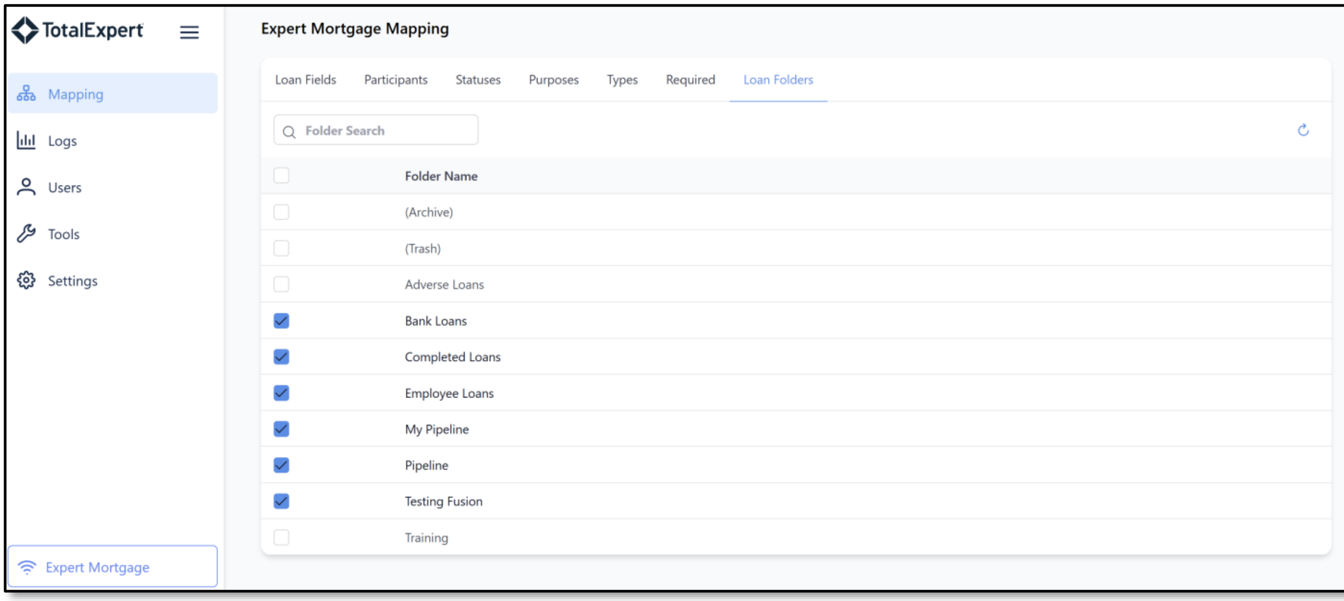
If you ever want to revert to a previous mapping version, you can do the following:

1. Click the current version in the lower-right corner of the field mapping.
2. Locate the desired version in the list.
3. Click **Set active** for that version.



Mapping – Loan Folders

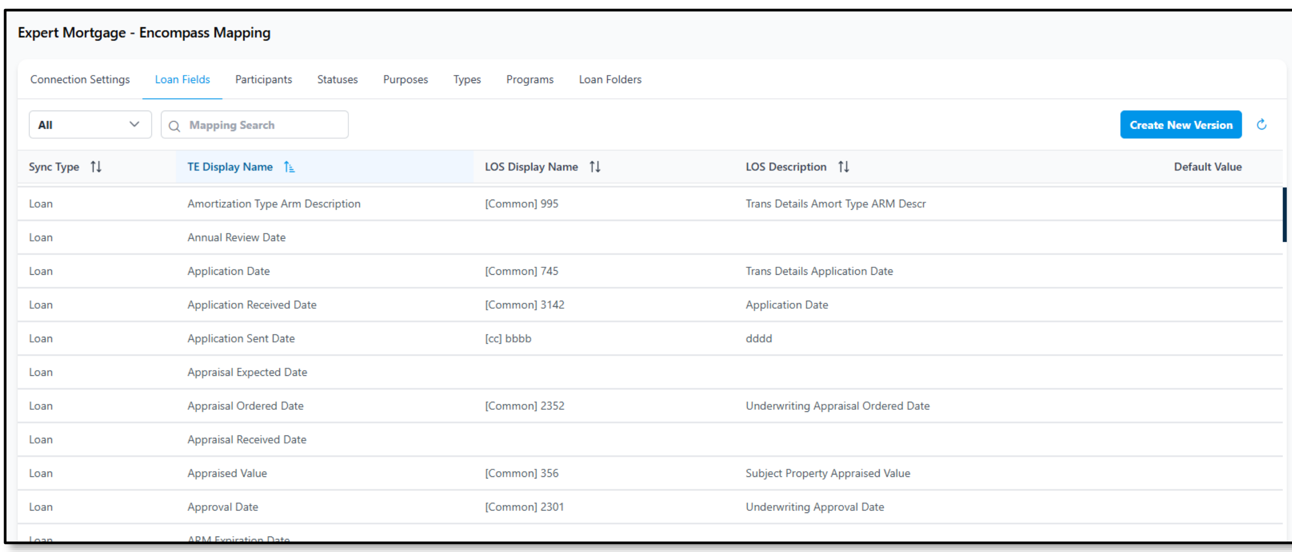
In the mapping interface under the Loan Folders tab, select the loan folders in Encompass from which you want the utility to sync underlying loan files with Total Expert. By deselecting a loan folder, any loan file associated with that folder will not sync with Total Expert.



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

Mapping – Loan Fields

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

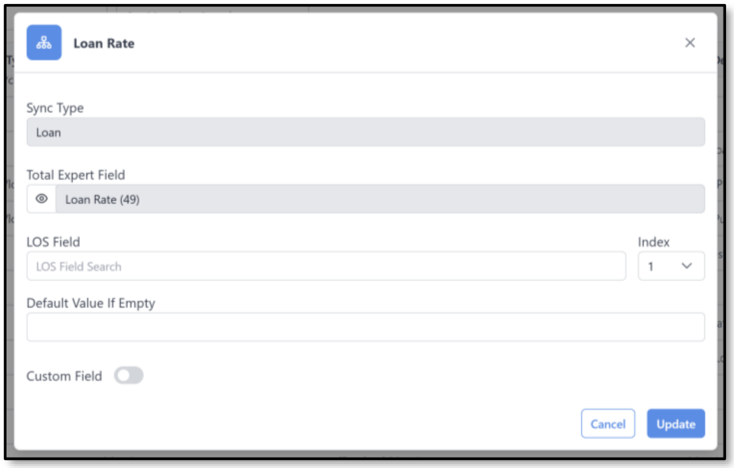


Standard Fields

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 clicking the row. This opens a pop -up box, where you have several options:

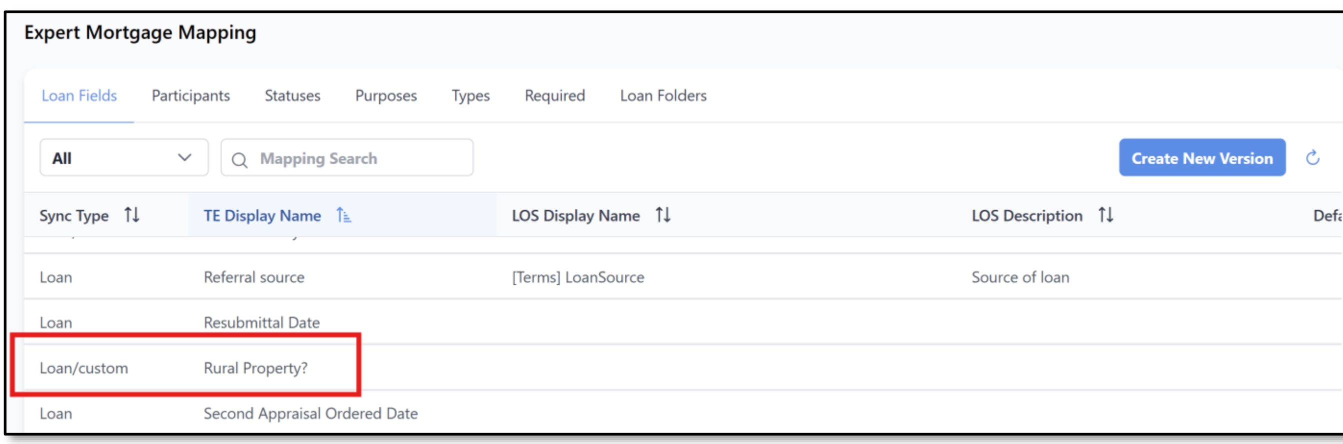
- **LOS Field** – You can search for the Encompass field ID you want to use from the Encompass field library for the field you want.
- **Index** – By setting this, you can determine the specific borrower pair on the loan file that populates the value in Total Expert. This is only available when the Sync Type is Borrower or CoBorrower.
- **Default Value If Empty** – If you prefer to always have a value come to Total Expert, manually type a value here. When a loan syncs, if the field in Encompass is blank, the value entered here is written to the loan record in Total Expert. (If the field is not blank, the actual value is used and this is ignored.)
- **Custom Field** – This option allows you more control over the field that is fetched, as well as the ability to write a regular expression for simple data manipulation.



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.

Your Total Expert custom fields are identified in the mapping interface with a `/custom` identifier in the sync type. Additionally, you can search for a field that is already mapped that you want to update and then edit that field by clicking on the field.



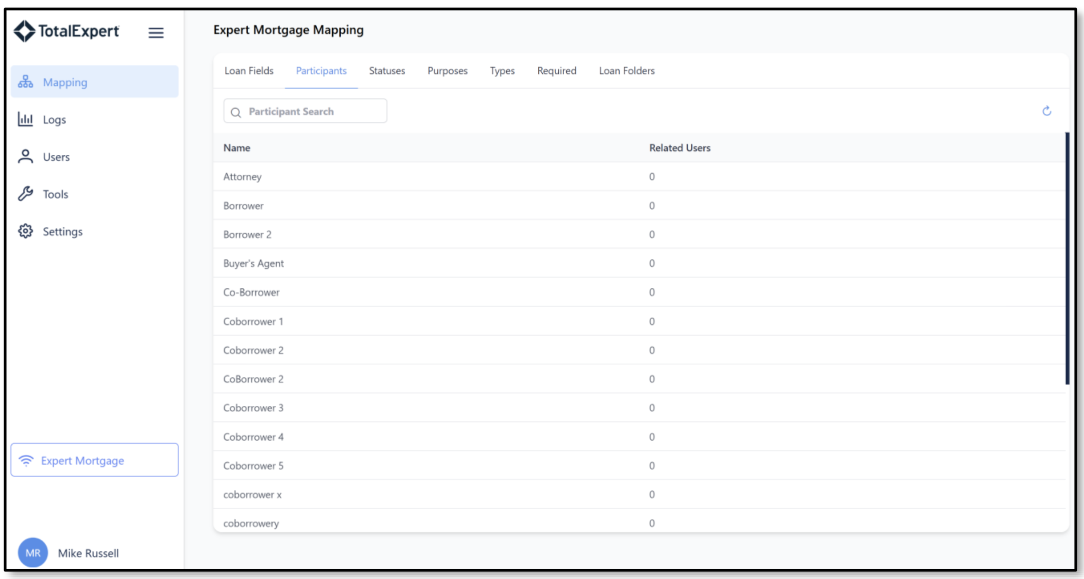
Clicking the field opens a pop-up box, where you have several options:

- **LOS Field** – You can search for the Encompass Field ID you want to use from the Encompass field library for the field you want.
- **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.
- **Default Value If Empty** – If you prefer to always have a value come to Total Expert, manually type a value here. When a loan syncs, if the field in Encompass is blank, the value entered here is written to the loan record in Total Expert. (If the field is not blank, the actual value is used and this is ignored.)
- **Custom Field** – This option allows you more control over the field that is fetched, as well as the ability to write a regular expression for simple data manipulation.

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

Mapping – Loan Participants and Participant Fields

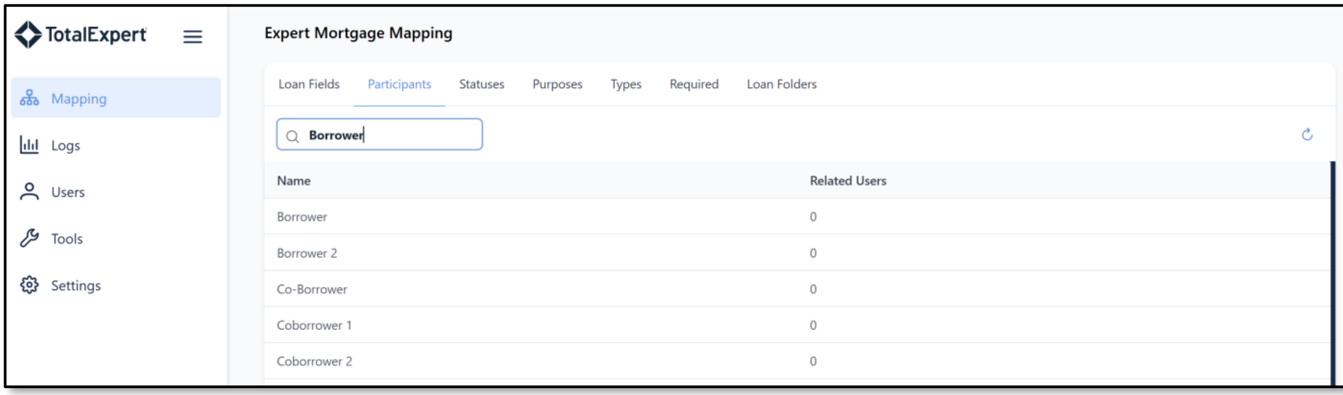
On the Participants tab, you can determine which Encompass fields populate which Total Expert fields. When Fusion is activated, there are default Encompass field mappings completed. You should review these defaults to ensure the mapping meets your needs and workflow.



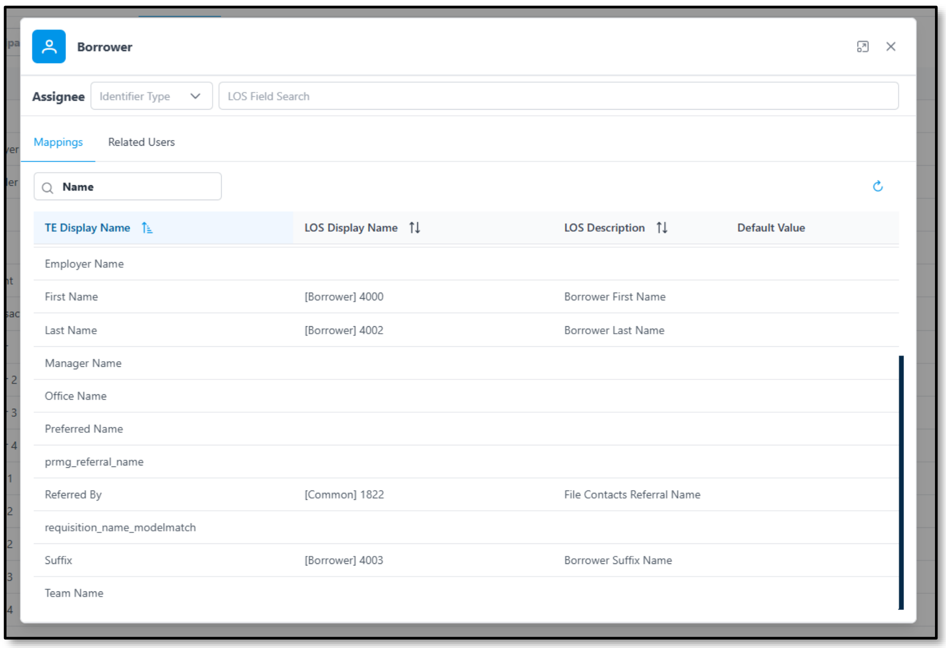
Standard Participants

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 clicking the participant.



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



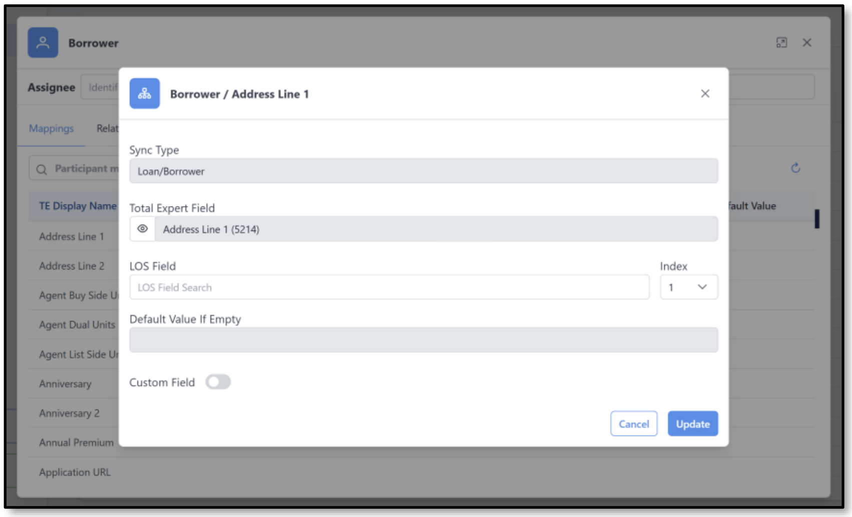
Standard Fields

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 clicking on it. This opens a pop-up box, where you have several options:

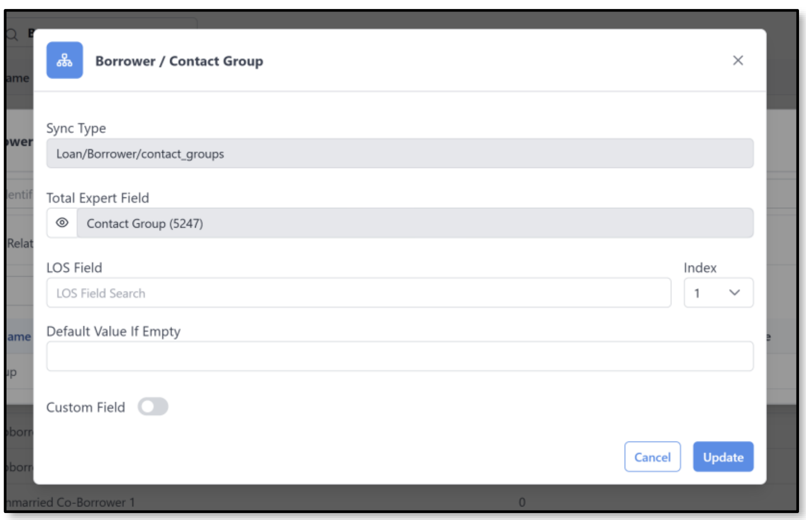
- **LOS Field** – You can search for the Encompass Field ID you want to use from the Encompass field library for the field you want.
- **Index** – By setting this, you can determine the specific borrower pair on the loan file that populates the value in Total Expert. This is only available when the Sync Type is Borrower or CoBorrower.
- **Default Value If Empty** – If you prefer to always have a value come to Total Expert, manually type a value here. When a loan syncs, if the field in Encompass is blank, the value entered here is written to the loan record in Total Expert. (If the field is not blank, the actual value is used and this is ignored.)

- **Custom Field** – This option allows you more control over the field that is fetched, as well as the ability to write a regular expression for simple data manipulation.



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 Group field mapping. Best practice is to not map a field, but instead manually type your values in the Default Value If Empty field:



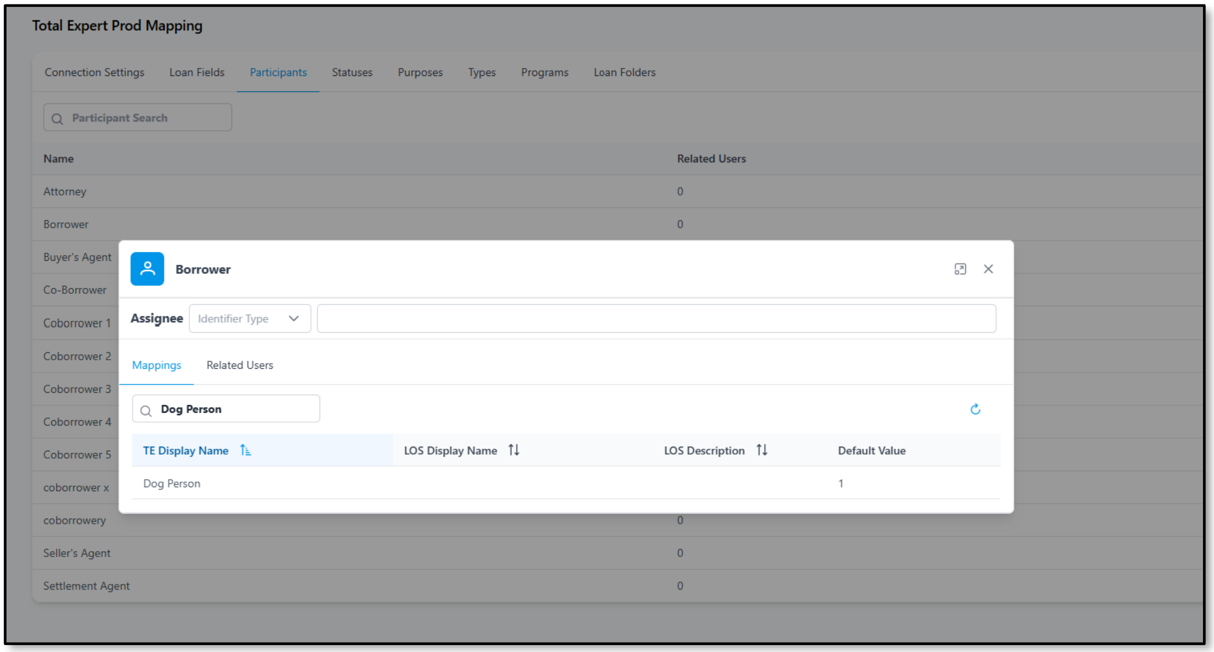
In the **Default Value if Empty** field, manually type in the contact group names you want to assign the contact to when they are synced from Encompass. If there are several contact groups, type them all in, separating each one from the next with a comma and a space (for example: Contact Group 1, Contact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

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

Custom Fields

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

Custom fields that exist in Total Expert are automatically available in your participant mapping screen. Additionally, you can search for a field already mapped that you want to update and then edit that field by clicking it.



Click the **Add** button to open a pop-up box, where you have several options:

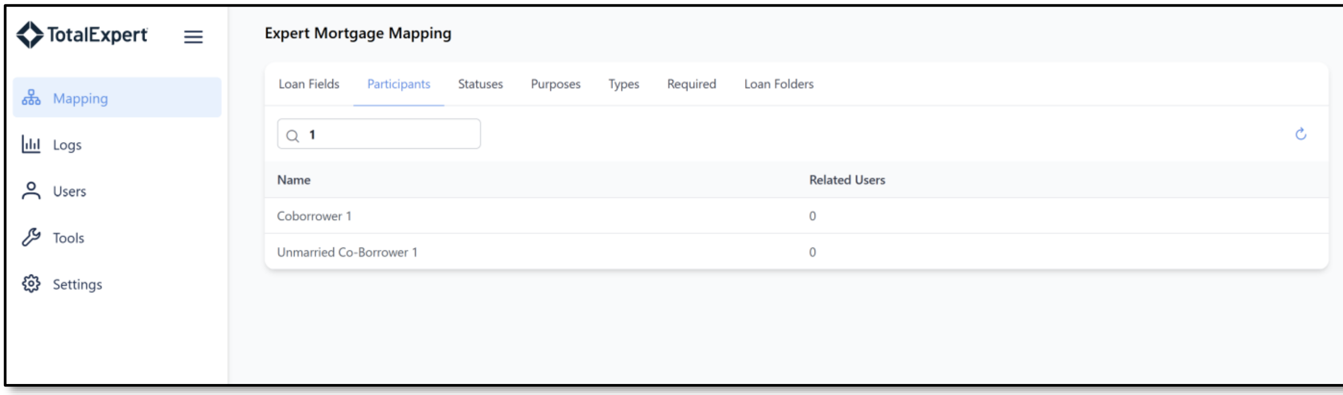
- **LOS Field** – You can search for the Encompass Field ID you want to use from the Encompass Field library for the field you want.
- **Index** – By setting this, you can determine the specific borrower pair on the loan file that populates the value in Total Expert. This is only available when the Sync Type is Borrower or CoBorrower.
- **Default Value If Empty** – If you prefer to always have a value come to Total Expert, manually type a value here. When a loan syncs, if the field in Encompass is blank, the value entered here is written to the loan record in Total Expert. (If the field is not blank, the actual value is used and this is ignored.)
- **Custom Field** – This option allows you more control over the field that is fetched, as well as the ability to write a regular expression for simple data manipulation.

As you make updates throughout the field mapping, your updates are automatically saved.

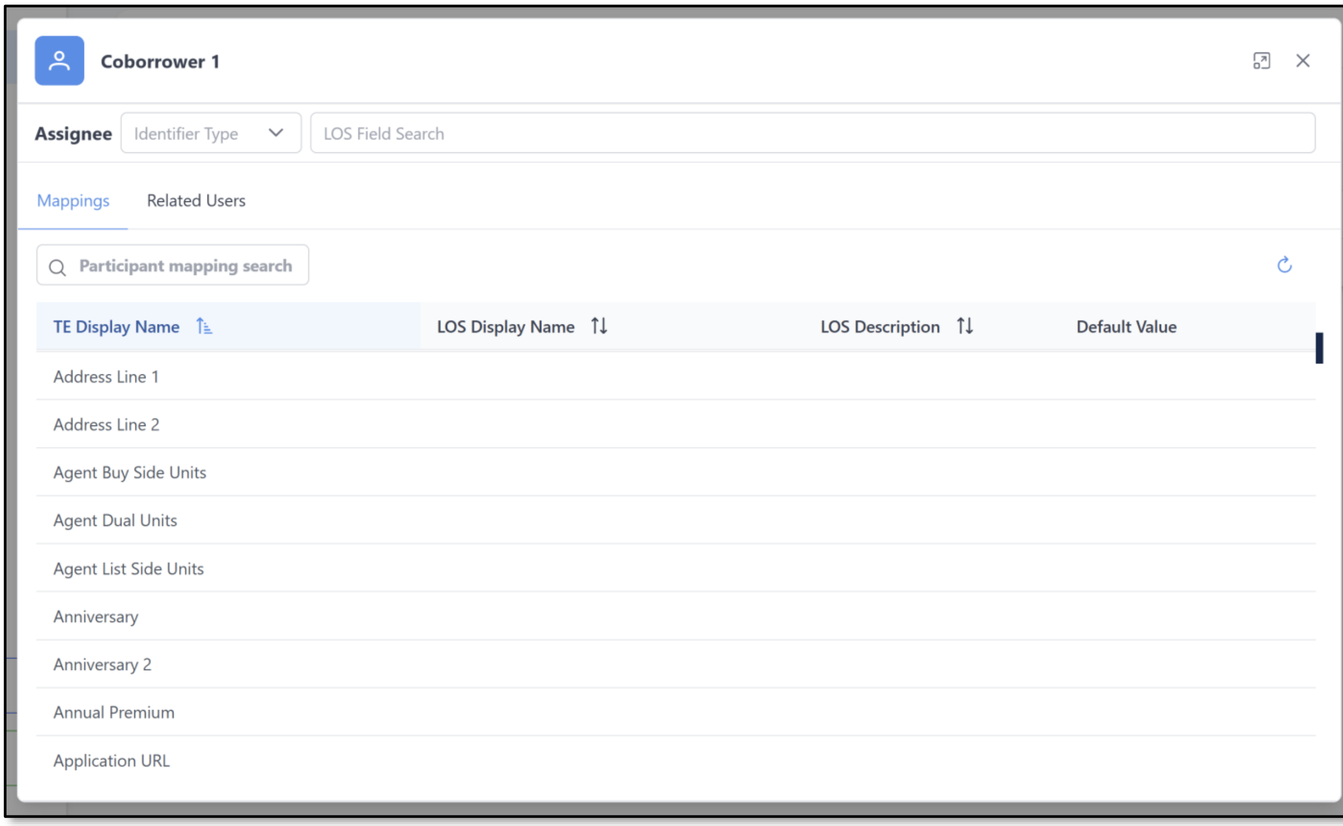
Custom Participants

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

Custom participants that exist in Total Expert are automatically available in your participant mapping screen. If you want to update a participant already mapped, you can search for that participant in the list and either double-click the entry or select it and click the **Edit** button.



Clicking the participant opens a pop-up box. Once you have selected the participant, complete the field mapping similar to standard participant mapping, including contact groups.



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

Important Notes on Participants

When syncing any participant with Total Expert, they must have a minimum of:

- first name
- last name
- source
- at least 1 of the following:
    - email address

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

When syncing a loan with Total Expert, only the borrower participant is required. If any of the minimum required data above is missing for the borrower, the loan file will not sync with Total Expert.

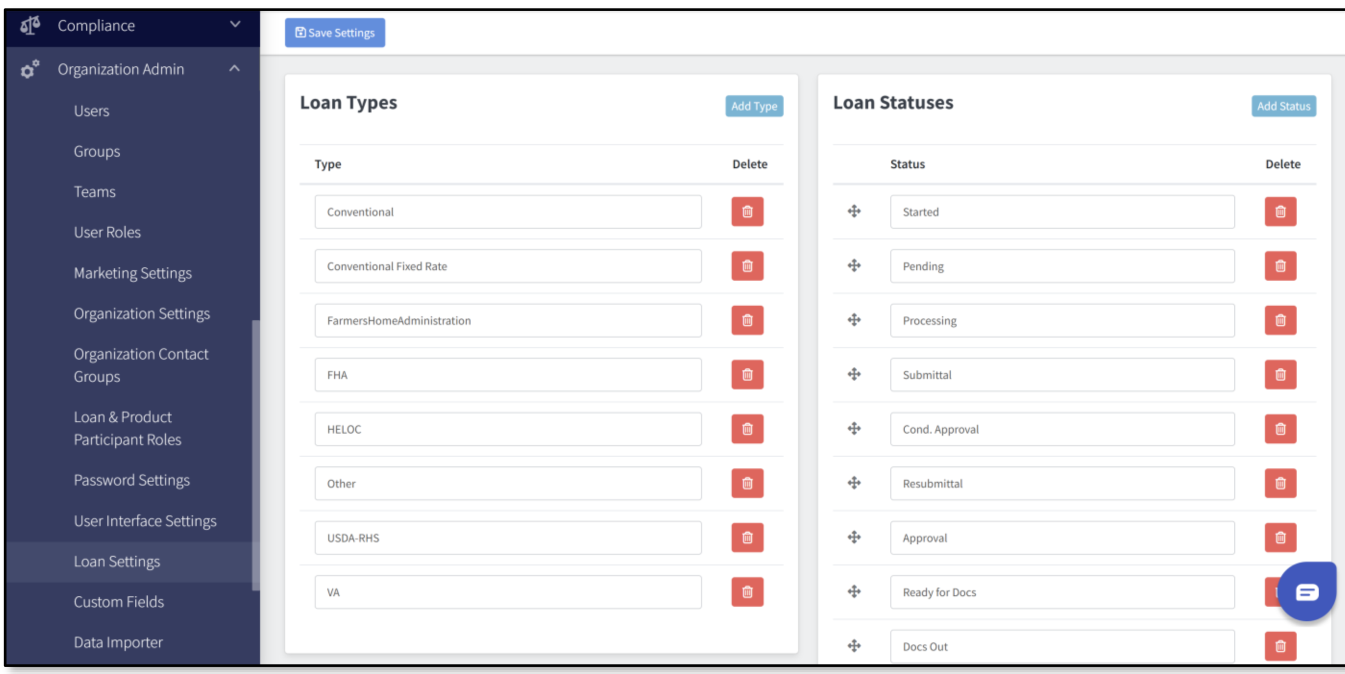
If any of the minimum required data is missing for other participants, but is available for the borrower, the loan record will sync with the borrower details but will skip any participants that have incomplete data.

Admin Settings – Statuses, Purposes, Types, and Programs

In these tabs, you can determine how your Encompass loan statuses, purposes, types, and programs 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 purposes, types or programs are not mapped, the value of the purpose, type, or program from Encompass will populate in Total Expert.

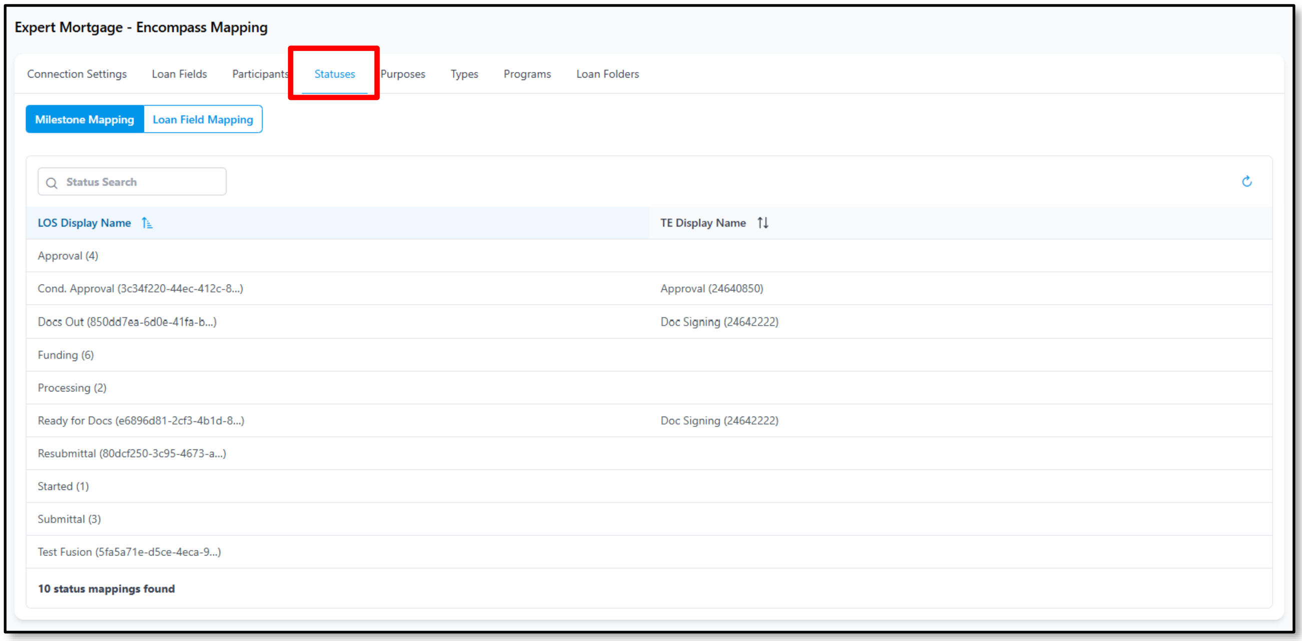
Prior to mapping your Total Expert values, these values must be configured on the Loan Settings page in Total Expert (navigate to **Organization Settings → Loan Settings**).



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.

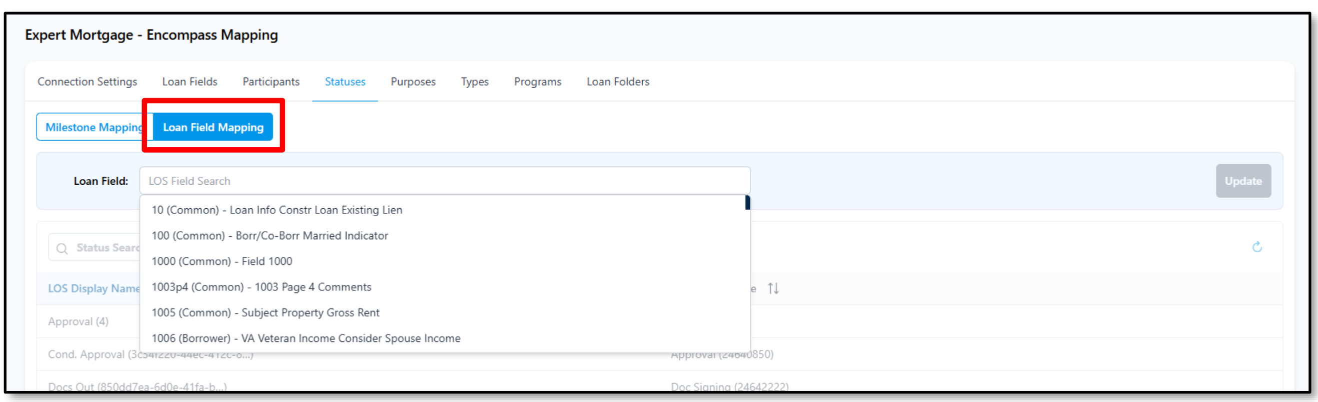
The Statuses tab automatically populates a list of the milestones you have configured in Encompass. On the right side is a drop-down list to select the corresponding Total Expert loan status for each one.



You can only configure each Encompass milestone to a single Total Expert status, but you can configure many Encompass milestones to the same Total Expert loan status.

When your loan file is created or updated, if the mapping is completed, the corresponding Total Expert loan status is used when it syncs to Total Expert. If a custom field is mapped, the value of that field will be used when sending to Total Expert.

Alternatively, you can map from any single Encompass field. By doing this, you are not mapping Total Expert loan status from the Encompass milestones, but instead you can send the value of any Encompass field. Click the **Loan Field Mapping** button and select the desired field from the **Loan Field:** drop-down list. 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 for custom fields and for business rules.



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

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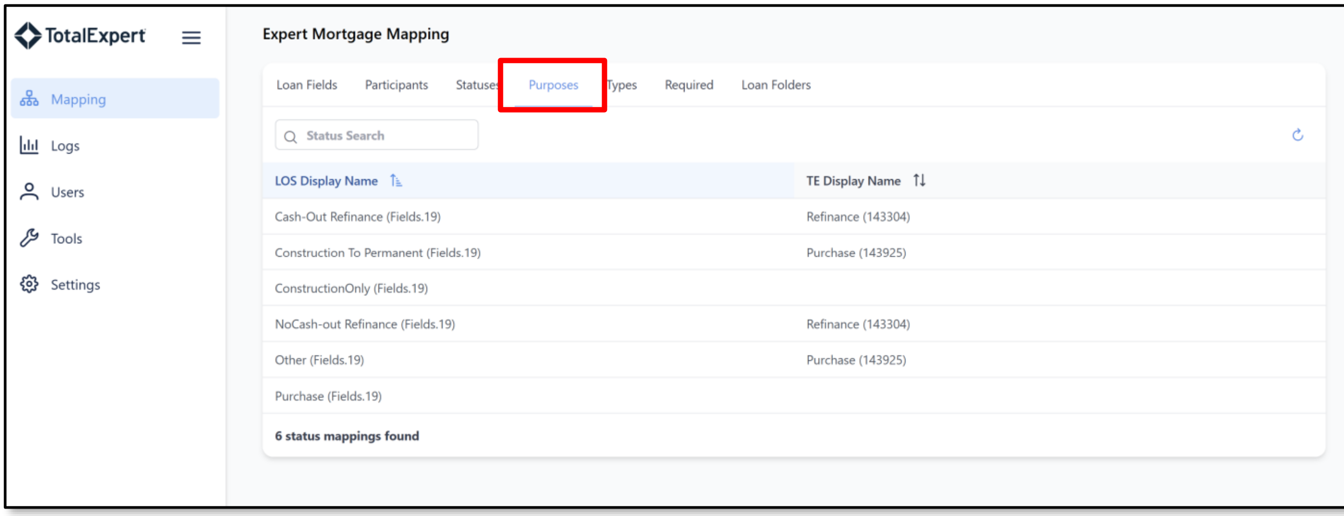
Loan Purposes

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 the corresponding Total Expert loan purpose for each one.

You can only configure each Encompass loan purpose to a single Total Expert purpose, but you can configure many Encompass loan purposes to the same Total Expert loan purpose.

When your loan file is created or updated, if the mapping is completed, the corresponding Total Expert loan purpose is used when it syncs to Total Expert.



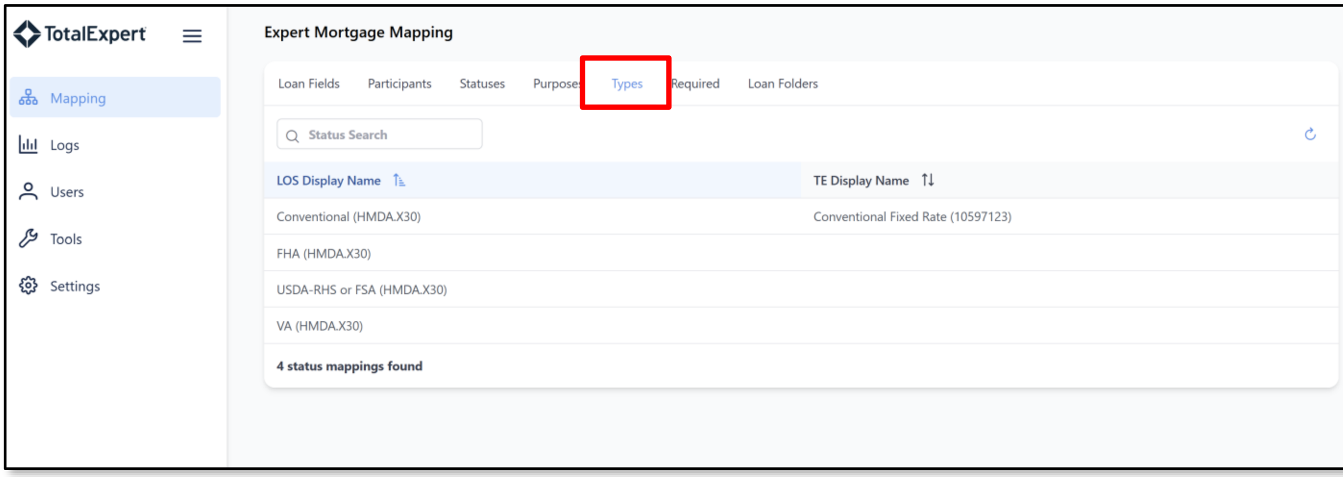
Once this is complete, click the **Types** tab.

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 the corresponding Total Expert loan type for each one.

You can only configure each Encompass loan type to a single Total Expert type, but you can configure many Encompass loan types to the same Total Expert loan type.

When your loan file is created or updated, if the mapping is completed, the corresponding Total Expert loan type is used when it syncs to Total Expert



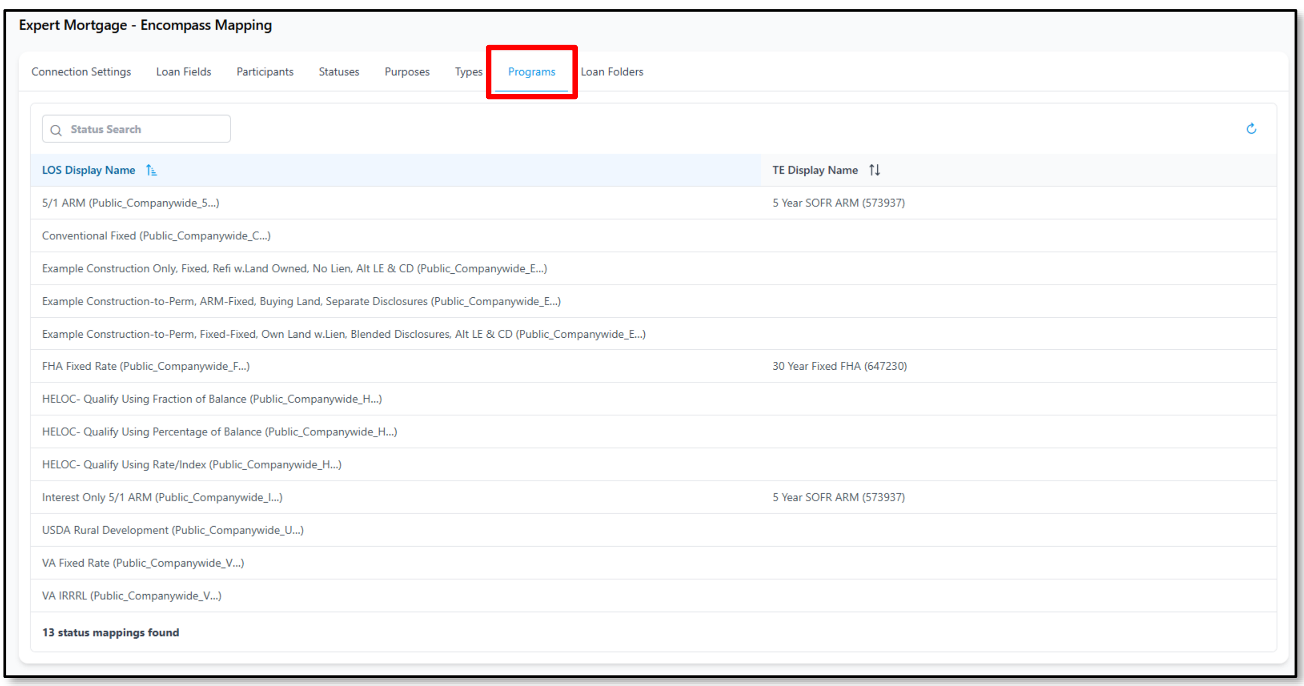
Once this is complete, click the **Programs** tab.

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 the corresponding Total Expert loan program for each one.

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

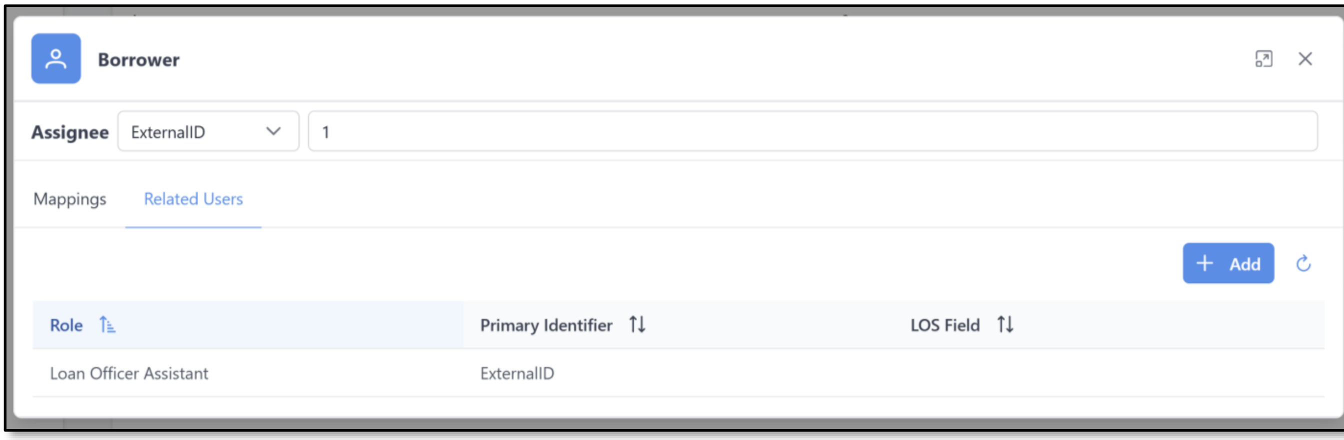
When your loan file is updated, if the mapping is completed, the corresponding Total Expert loan program is used when it syncs to Total Expert.



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

Mapping – Participant – Related Users

Click the **Related Users** tab. In this tab, you can control the assignees and related users to loan participants. This is completed by enabling the selection of the identifier and the corresponding Encompass field.

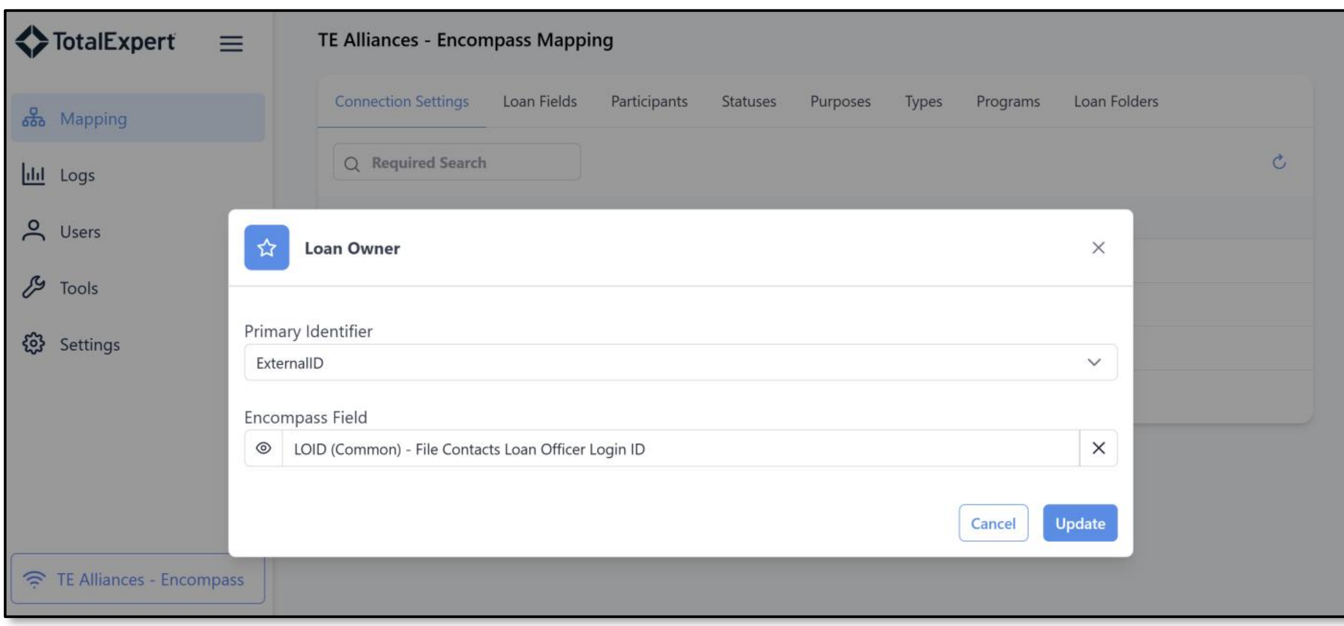


Owner Details

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, ID , and Email.

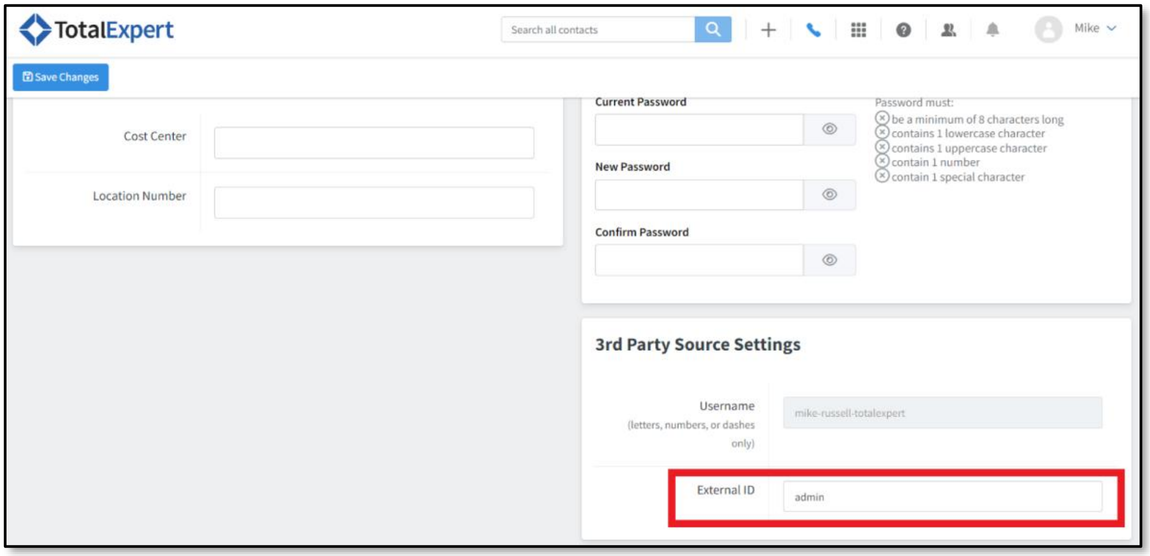
To change which field is used:

1. Select **Mapping** in the Fusion navigation menu.
2. Click the **Required** tab.
3. Click the **Owner** row. A pop-up box opens.
4. Select the identifier and the Encompass field selector:

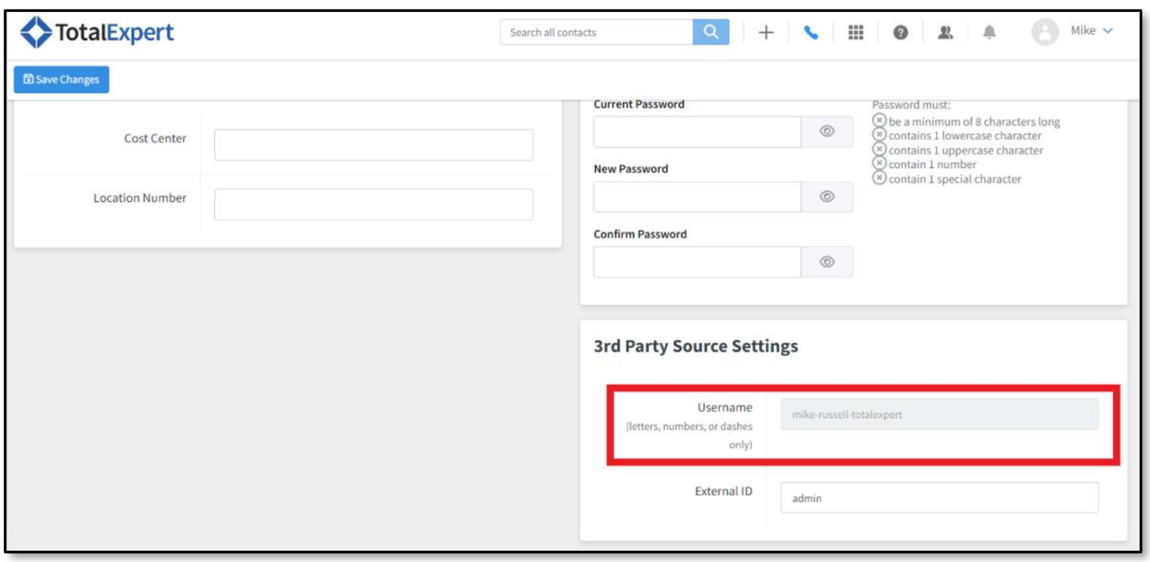


Note
Only 1 owner is allowed per loan record.

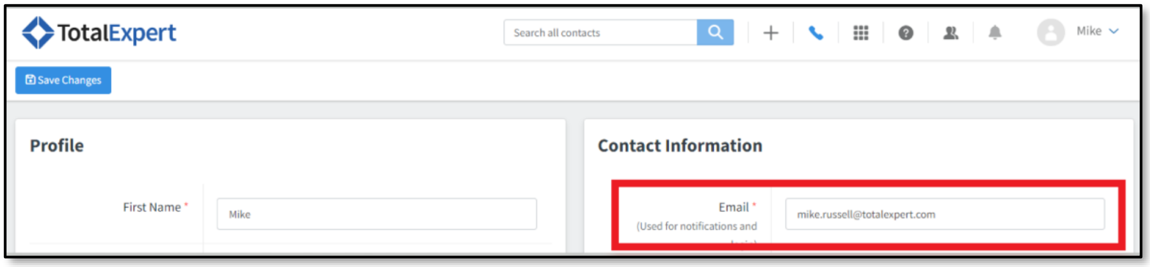
1. **External ID** – When this option is selected, the value of the Encompass field must match the value in the Total Expert user's External ID field.



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.



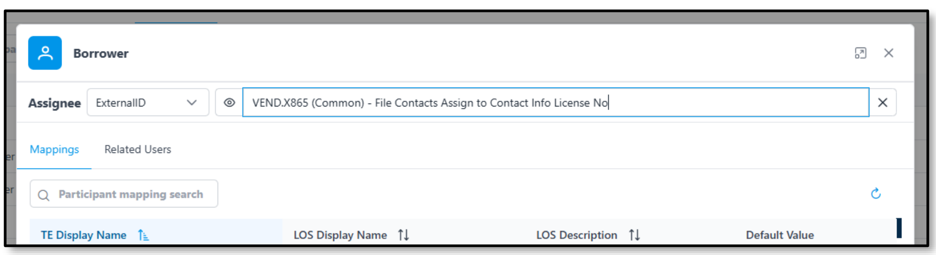
Assignee

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. To configure this:

1. Select **Mapping** in the Fusion navigation menu.
2. Select the participant you want to have an assignee for.
3. Configure the identifier and Encompass field to populate near the top of the pop-up box.

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

The Total Expert identifier can be set to External ID, ID, Username, or Email and has the same requirements as described in the Owner Details section above. Configuring the assignee in the individual participant will apply the assignment for that participant only.



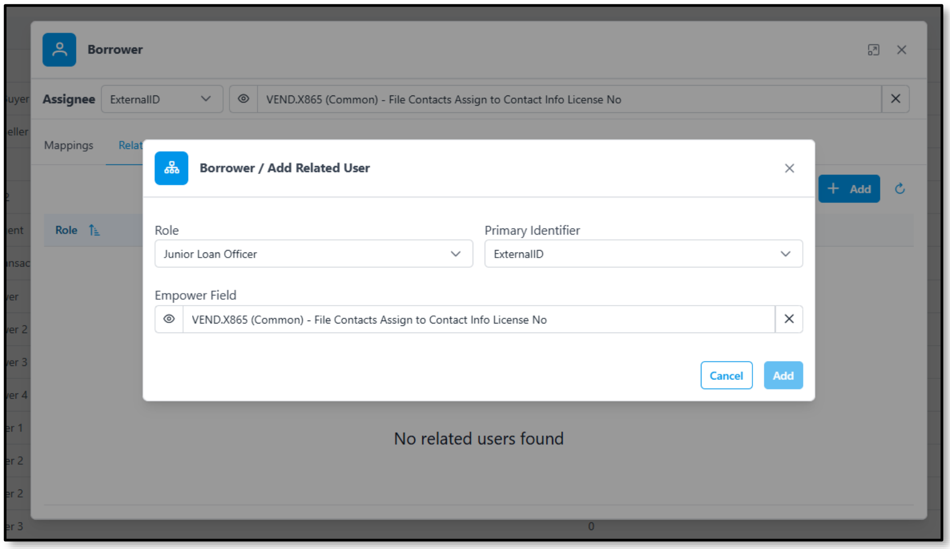
Related Users Details

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, but for only 1 related user role per participant. To configure this:

1. Select **Mapping** in the Fusion navigation menu.
2. Select the participant you want to have a related user for.
3. Configure the identifier and Encompass field to populate on the Related User tab of the pop-up box.

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

The Total Expert identifier can be set to External ID, ID, Username, or Email and has the same requirements as described in the Owner Details section above. You can also select the corresponding loan participant and user role for the related user.

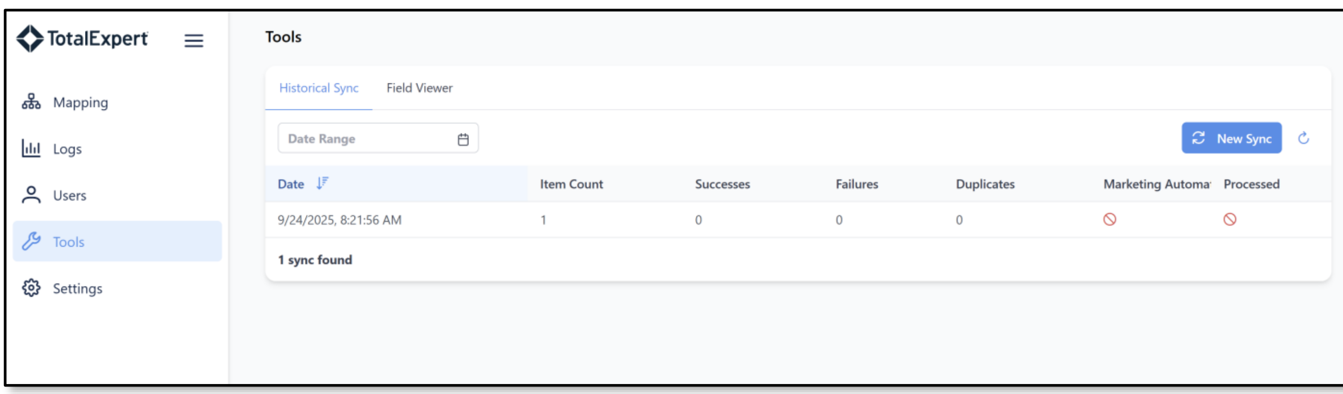


Tools

Historical Sync

Syncing loans historically or in bulk is also available to you with Fusion.

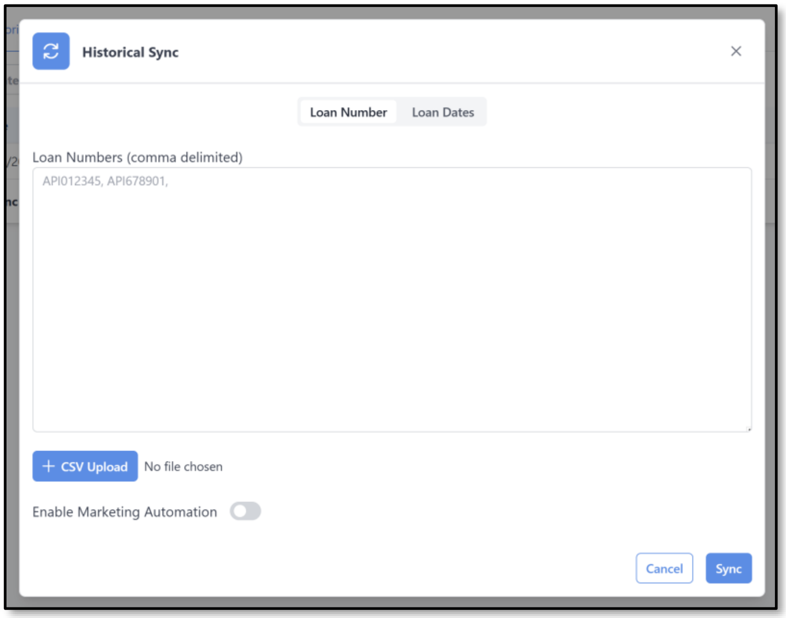
1. Select **Tools** in the navigation menu.
2. Click the **New Sync** button.
3. The data mapping configured as part of Fusion is used for the bulk sync.



4. In the Historical Sync box:
   a. Manually type the Encompass GUID that you want to sync with Total Expert. If you want to sync more than 1 at once, enter the GUID for each, separated by commas.
   b. (optional) Toggle on the **Enable Marketing Automation** switch to start applicable automation in Total Expert when the loans are synced.

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

c. Click the **Sync** button.



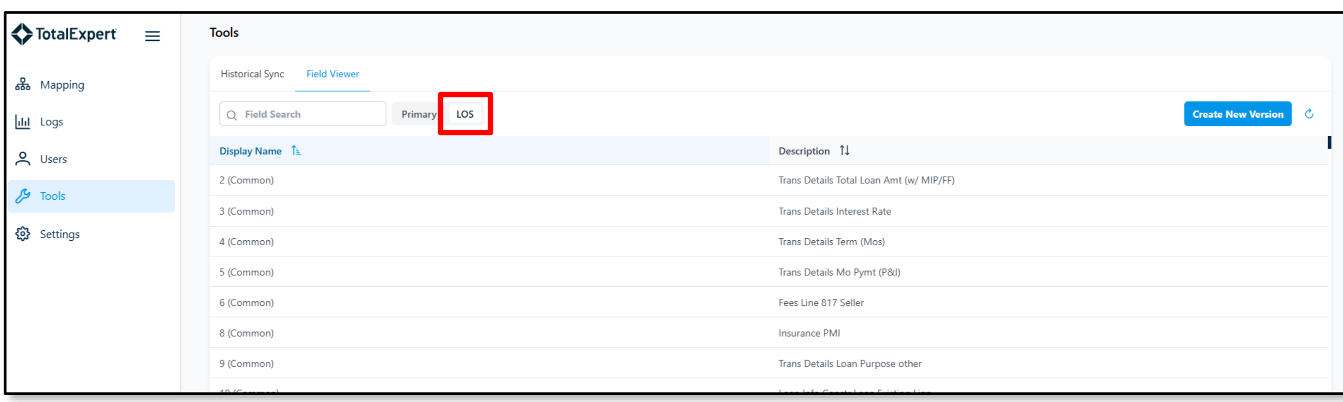
The loan sync job appears in the sync history view with data on success or failures. If there was a failure of loans syncing, that error can be reviewed in the logs.

Field Viewer

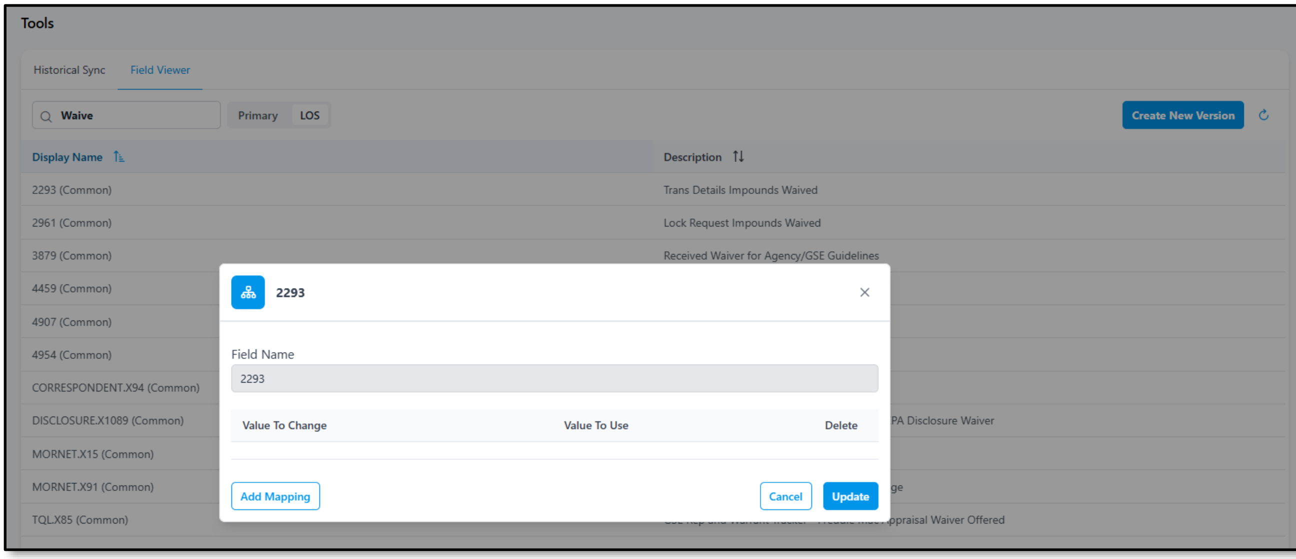
The field viewer tool allows you to see all available fields from TE and Encompass in a single table. This tool allows you to configure translation of specific values from specific LOS fields when the data is syncing to Total Expert.

To configure this:

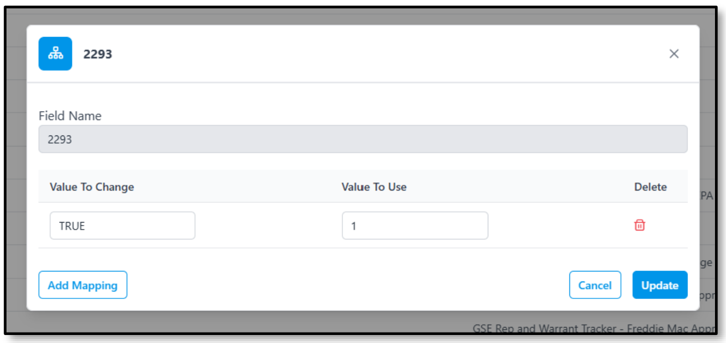
1. Select **Tools** in the Fusion navigation menu.
2. Select the **Field Viewer** tab.
3. Click the **LOS** button next to the search bar.



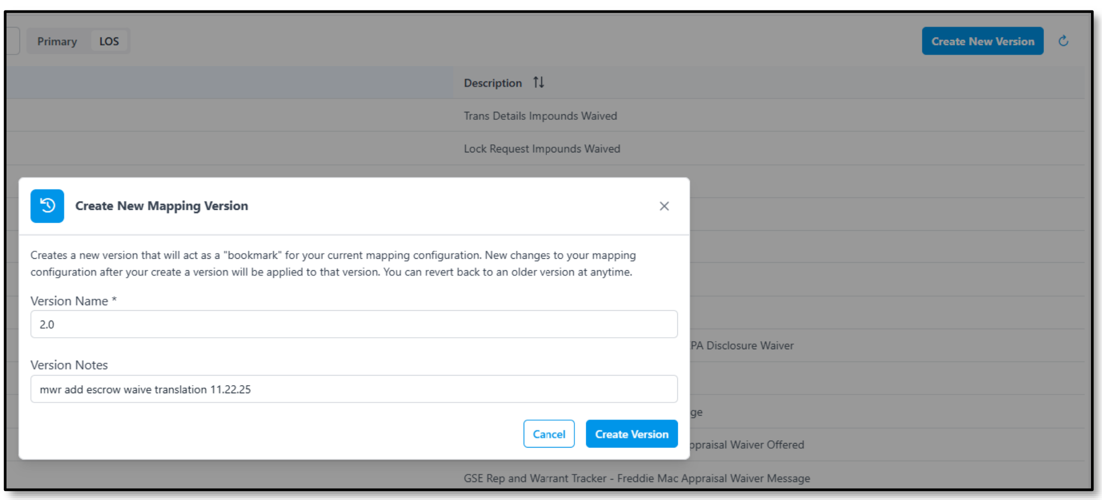
4. Search for the Encompass field you want to configure.
5. Click the row to select it. A pop-up box for that field appears.
6. Click the **Add Mapping** button.



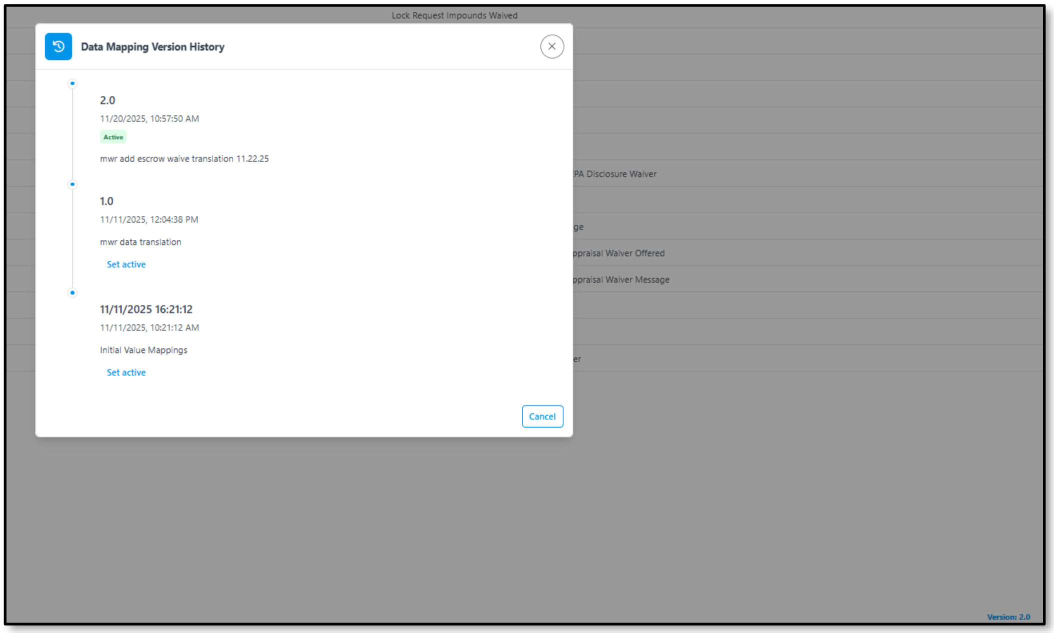
7. Configure the value from Encompass that you want to change and the value to use when syncing to Total Expert.



8. Click the **Update** button.
9. (optional) Create a new version of your Encompass Field Viewer value manipulation.

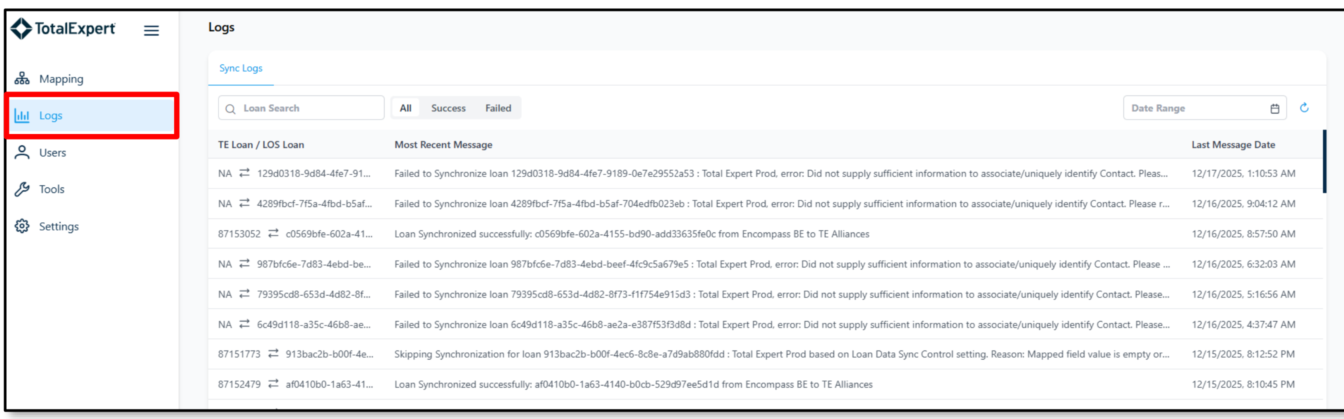


You can revert to previous versions at any time.

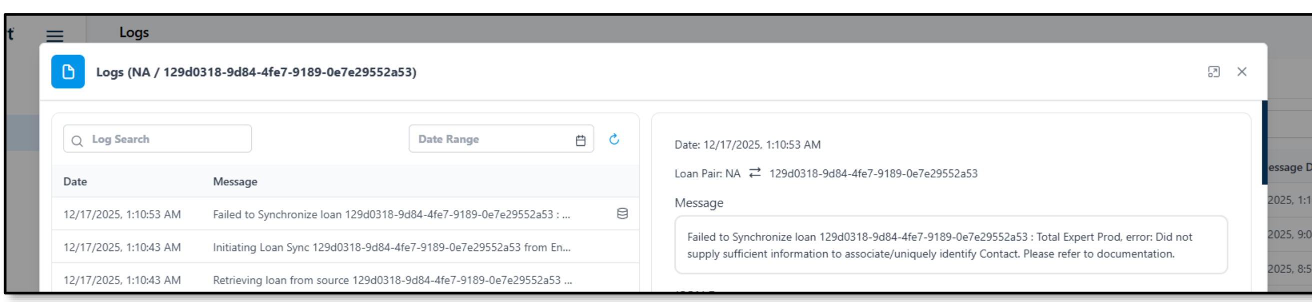


Troubleshooting

With Fusion, all the details you would need to troubleshoot any issues are directly at your fingertips. Fusion includes a robust log view to investigate data feed concerns or failures. To access this, select **Logs** in the Fusion navigation menu.



Filter by Total Expert or Encompass unique loan identifier, date, or outcome (success/failed). For more details on a specific loan, select the log for historical information:



Support Summary

For the most efficient support possible, when reaching out to Total Expert with a request for support, provide a detailed summary of your issues with at least one Encompass loan number in question. The appropriate Total Expert representative with access to your instance of Fusion will have the tools needed to investigate thoroughly with recommendations.