

ENCOMPASS® FOR AGENCY

User Guide | June 19, 2017

Last Revised 2/27/2019

4800 Falls of Neuse Road, Suite 400 | Raleigh, NC 27609

p (800) 848-0143 | f (919) 755-8350 | www.softprocorp.com

Copyright and Licensing Information

Copyright © 1987–2019 by SoftPro, Raleigh, North Carolina.

No part of this publication may be reproduced in any form without prior written permission of SoftPro. For additional information, contact SoftPro, 4800 Falls of Neuse Road, Raleigh, NC 27609, or contact your authorized dealer.

Microsoft, Windows, and MS–DOS are registered trademarks of Microsoft Corporation in the United States and/or other countries. WordPerfect is a registered trademark of Corel Corporation. Crystal Reports is a registered trademark of SAP AG. HP LaserJet is a registered trademark of Hewlett Packard Development Company, L.P. GreatDocs is a registered trademark of Harland Financial Solutions Incorporated. RealEC Technologies, Inc. is majority owned by Lender Processing Services. Encompass and Ellie Mae are the registered trademarks of Ellie Mae, Inc. All other brand and product names are trademarks or registered trademarks of their respective companies.

IMPORTANT NOTICE – READ CAREFULLY

Use of this software and related materials is provided under the terms of the SoftPro Software License Agreement. By accepting the License, you acknowledge that the materials and programs furnished are the exclusive property of SoftPro. You do not become the owner of the program, but have the right to use it only as outlined in the SoftPro Software License Agreement.

All SoftPro software products are designed to ASSIST in maintaining data and/or producing documents and reports based upon information provided by the user and logic, rules, and principles that are incorporated within the program(s). Accordingly, the documents and/or reports produced may or may not be valid, adequate, or sufficient under various circumstances at the time of production. UNDER NO CIRCUMSTANCES SHOULD ANY DOCUMENTS AND/OR REPORTS PRODUCED BE USED FOR ANY PURPOSE UNTIL THEY HAVE BEEN REVIEWED FOR VALIDITY, ADEQUACY AND SUFFICIENCY, AND REVISED WHERE APPROPRIATE, BY A COMPETENT PROFESSIONAL.

Table of Contents

Introduction	5
Prerequisites	6
Setting Up a SoftPro Agent in Encompass.....	7
Adding “SoftPro Agents” to My Title Companies.....	7
Adding a SoftPro Agent to My SoftPro Agents.....	8
Placing a New Order From Encompass	12
Opening the Order Screen	12
Required Data.....	12
Opening the Integration.....	12
Selecting a Provider.....	13
Order Screen	14
Order Information and Loan Information Sections.....	14
The Place Order Tab	14
Changing a Provider.....	14
Selecting a Product.....	14
Adding a Comment or Document to the Order.....	15
Submitting the Order Request	16
Returning to the Encompass Order.....	17
Order Updates in Encompass	19
Receiving SoftPro Agent Communications.....	19
Retrieving a Document.....	20
Sending Documents and Comments to a SoftPro Agent	22
Managing New Orders in 360.....	23
Receiving a New Order.....	23
The Queue	23
The Review Screen	23
Linking Transaction to an Order (1).....	24
Groups Section (2)	24
Data Section (3)	24
Notes Section (4)	25
Documents Section (5)	25
Accepting the Transaction.....	25
Rejecting the Transaction.....	25

Communicating with the Encompass Customer.....	27
Order Summary Screen in 360	27
Sending a Communication	28
Canceling an Order.....	29
Revisions.....	31
Appendix A.....	32
Appendix B.....	33
Appendix C.....	34

Introduction

With its Encompass® suite of products, Ellie Mae® is a leading provider of loan origination software solutions for the residential mortgage industry. With SoftPro's *Encompass® for Agency* integration, Encompass lenders can now send title, escrow and closing service orders directly to SoftPro® service providers, without leaving the Encompass loan file. Here are some of the benefits of this integration:

- *Eliminates the need for lenders to fax or email order requests*
- *Provides a secure method of transmitting private personal information between lender and title service provider*
- *Reduces human error and inefficiencies caused by re-keying data*
- *Allows SoftPro users to securely send key title and closing documents to an Encompass lender directly from a ProForm order*
- *Allows Encompass lenders to retrieve key title and closing documents from a SoftPro service provider and save them into the loan's eFolder without the need to scan or browse.*

This User Guide will provide the SoftPro customer with information on how the Encompass integration works from the Encompass user's perspective and how orders sent from an Encompass user are handled in SoftPro 360.

Prerequisites

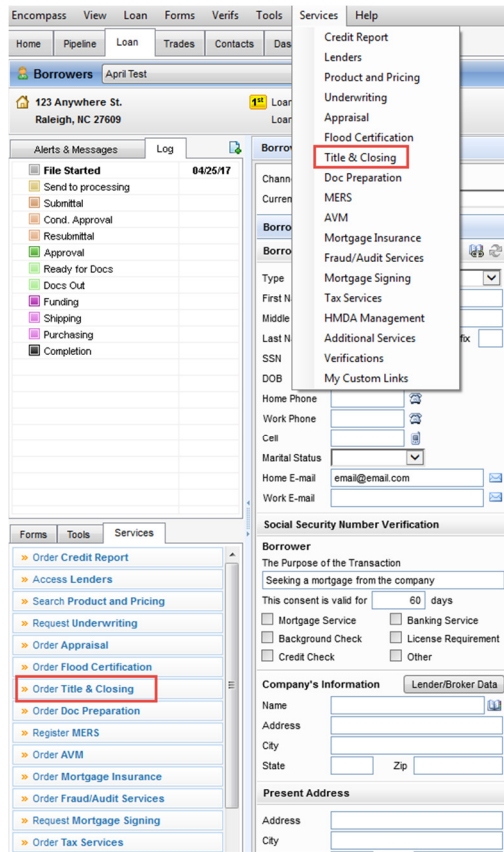
Encompass for Agency is available to all SoftPro customers who are not a direct operation of Fidelity National Title Group. If you would like to receive title and closing orders from an Encompass lender using Encompass for Agency, please sign up on-line at <http://info.softprocorp.com/encompass-configuration>. For more information, contact SoftPro at 800-848-0143, ext. 1 or visit www.softpro360.com.

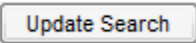
Setting Up a SoftPro Agent in Encompass

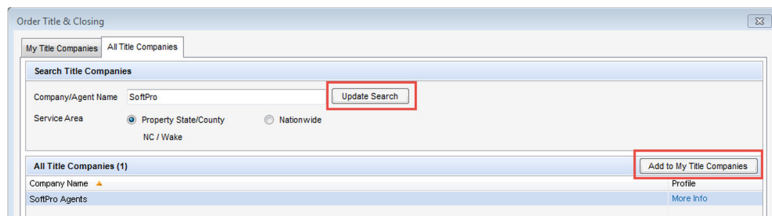
Adding “SoftPro Agents” to My Title Companies

The first time ordering title or closing services, an Encompass lender will need to add “SoftPro Agents” to his **My Title Companies** list.

1. Select **Order Title & Closing** on the Services tab.



2. In the **All Title Companies** tab, enter **SoftPro** in the **Company/Agent Name** field and click  to display **SoftPro Agents** in the grid below.



3. Click to add **SoftPro Agents** to **My Title Companies**.

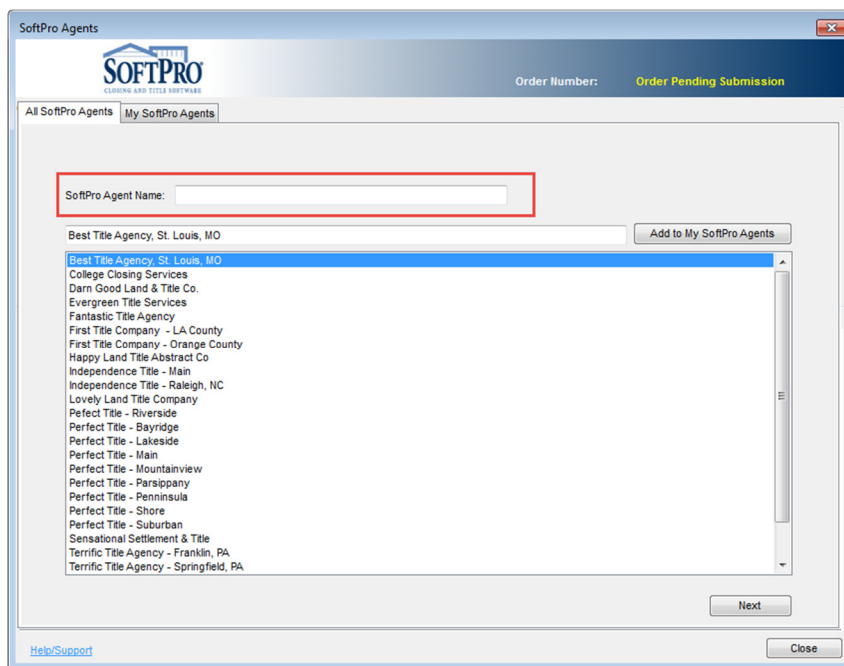


For the next order, when an Encompass user selects **Order Title & Closing**, the **My Title Companies** list will open with **SoftPro Agents** in the list. Selecting **SoftPro Agents** and , or double clicking on **SoftPro Agents**, opens the Encompass for Agency integration.

Adding a SoftPro Agent to My SoftPro Agents

When the Encompass for Agency integration opens for the first time, the **All SoftPro Agents** tab displays the list of all SoftPro agencies which have registered for access to the integration. The Encompass user will need to search for the SoftPro agent with whom he works and add that agent to his **My SoftPro Agents** list.

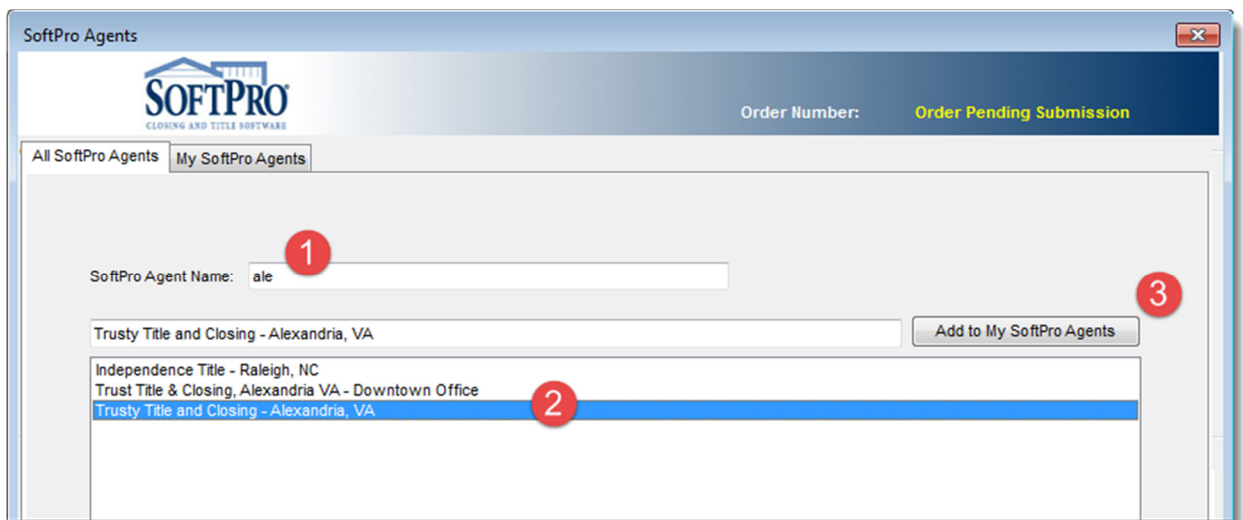
1. In the **All SoftPro Agents** screen, enter part or all of the agent name in the **SoftPro Agent Name** field.




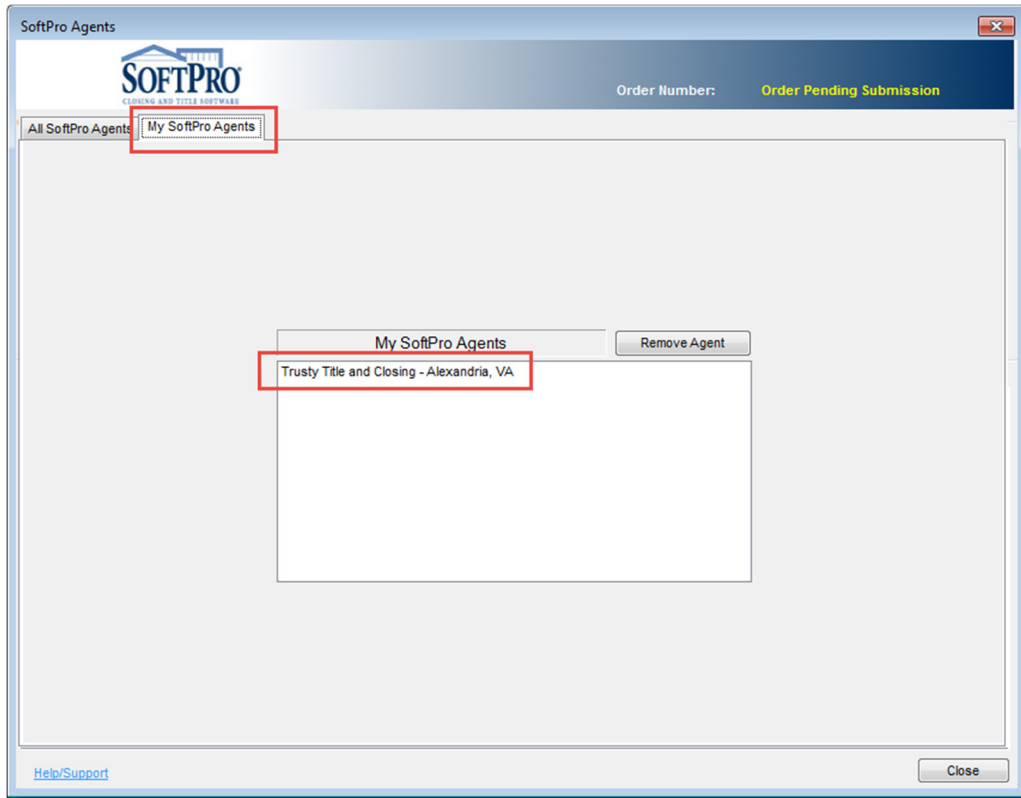
This search feature operates as a filter, so entering a few letters will filter the list as shown in this example:

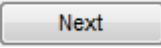


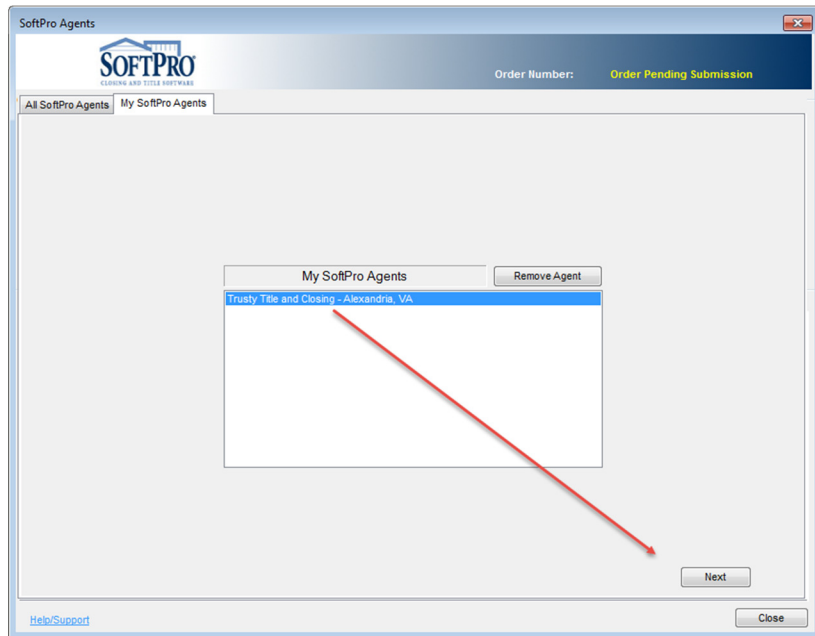
2. After filtering the list (1), the Encompass user can select the correct SoftPro Agent (2).




3. By selecting  (3), the **SoftPro Agent** will be added to the **My SoftPro Agents** screen.



4. Selecting the **SoftPro Agent** and  adds the agent as the Provider in the **Place Order** tab of the main ordering screen.



The next time an Encompass user opens the Encompass for Agency integration, it will open to the **My SoftPro Agents** tab with the user's SoftPro Agent selected. Double clicking on the SoftPro Agent or selecting  will open the main ordering screen with the selected SoftPro Agent as the Provider.

Placing a New Order From Encompass

Opening the Order Screen

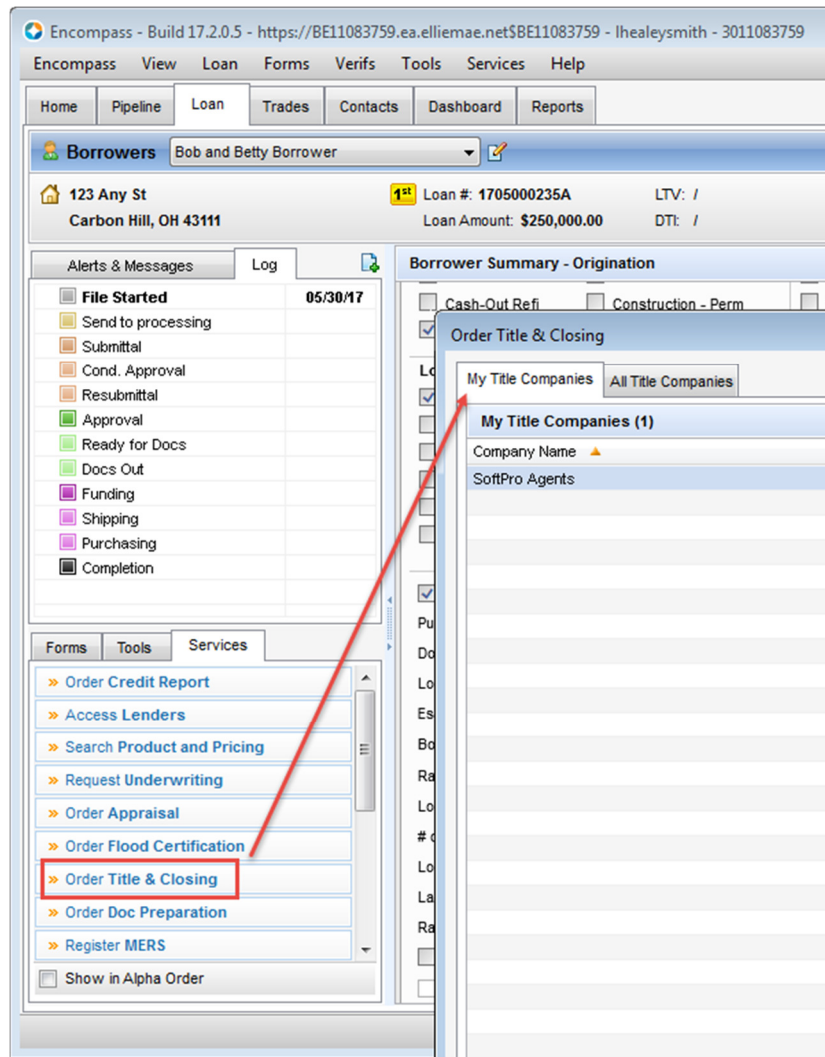
Required Data

The following Encompass fields must contain data for the Encompass for Agency integration to open:

- Borrower First and Last Name
- Subject Property Address, City, State and Zip

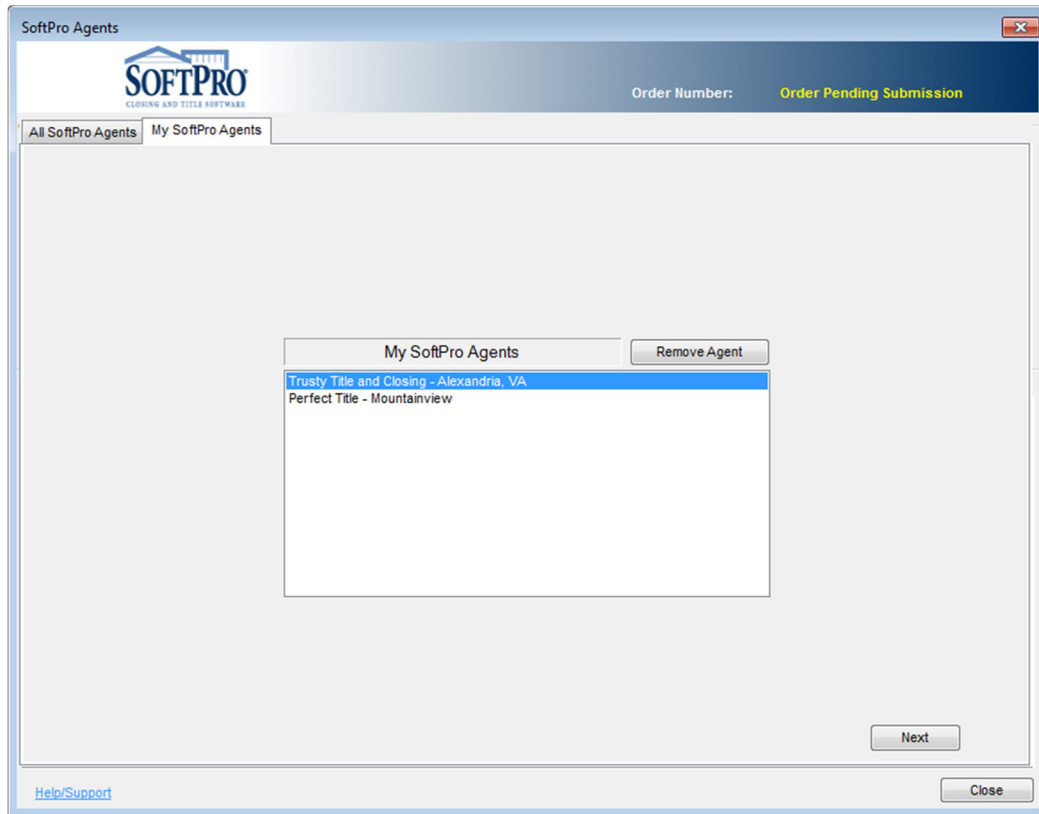
Opening the Integration

From the Encompass loan file, selecting **Order Title & Closing** and then **SoftPro Agents** in **My Title Providers** or **All Title Providers** opens the integration. (For more information on setting up **SoftPro Agents** in **My Title Providers**, see *Adding SoftPro Agents to My Title Providers*, above.)



Selecting a Provider

In the **My SoftPro Agents** tab, select the agent who will receive the order and or double click on the agent name. (Form more information on setting up a SoftPro Agent in **My SoftPro Agents**, see **Adding a SoftPro Agent to My SoftPro Agents**, above.)



This opens the order screen.


Order Screen

Order Information and Loan Information Sections

Opening the Order screen pulls in certain order information from the Encompass loan file. Transaction, Property Type, Occupancy, Loan Type and Est. Closing may be changed in the Order Information section of the screen. Any changes made to these fields does not save back to the Encompass loan file. A **Need By Date** may be entered if desired.

The Place Order Tab

Changing a Provider

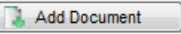
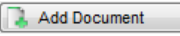
In the **Place Order** Tab, the selected **Provider** can be changed by selecting the  button. This takes the user back to the **My SoftPro Agents** screen or, if there are no agents in the user's **My SoftPro Agents** screen, to the **All SoftPro Agents** screen.

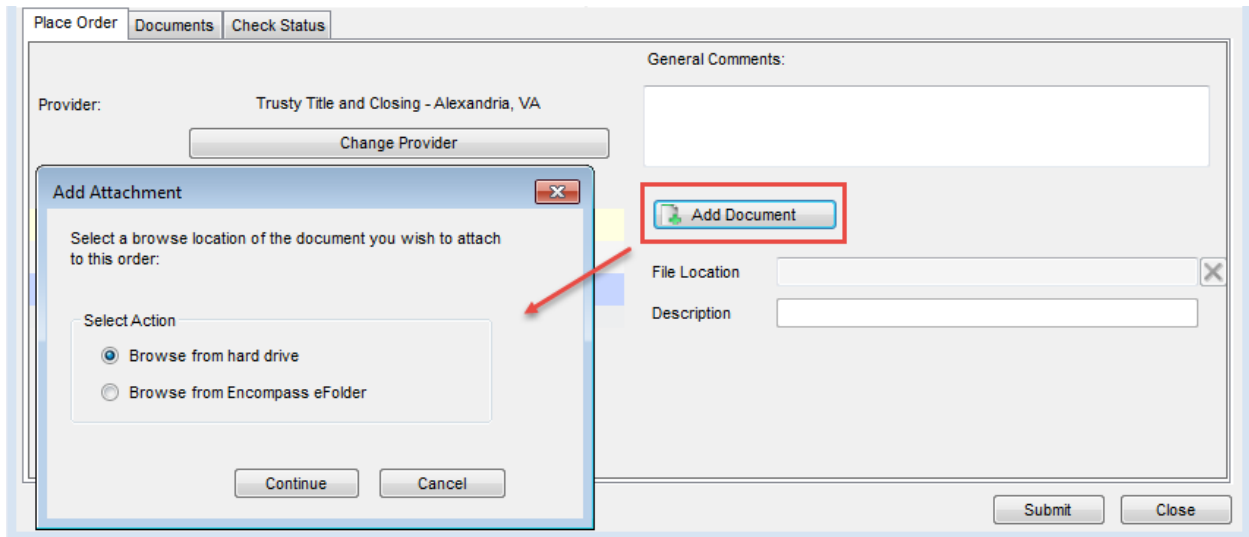
Selecting a Product

There are three product choices from which to select: **Title Only**, **Escrow Only** and **Title and Escrow**.

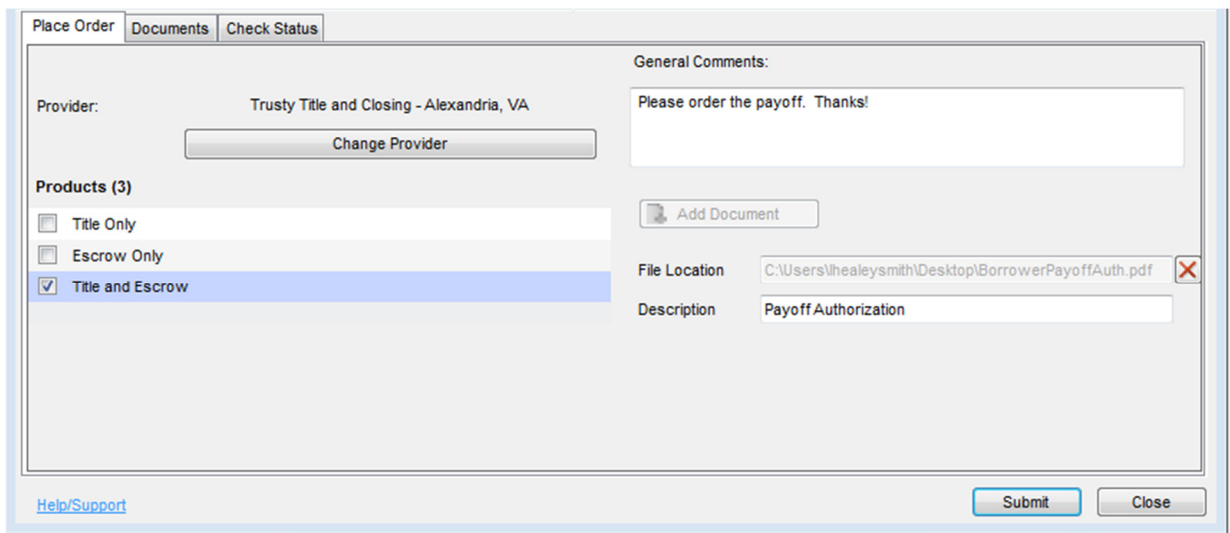
Selecting a product enables the  button.


Adding a Comment or Document to the Order

Selecting a Product also enables the **General Comments** text field and the  button. Comments and documents can be sent with the order. To add a comment, the user enters the text in the **General Comments** text field. To add a single Document, the user selects the  button. This opens the **Add Attachment** screen.

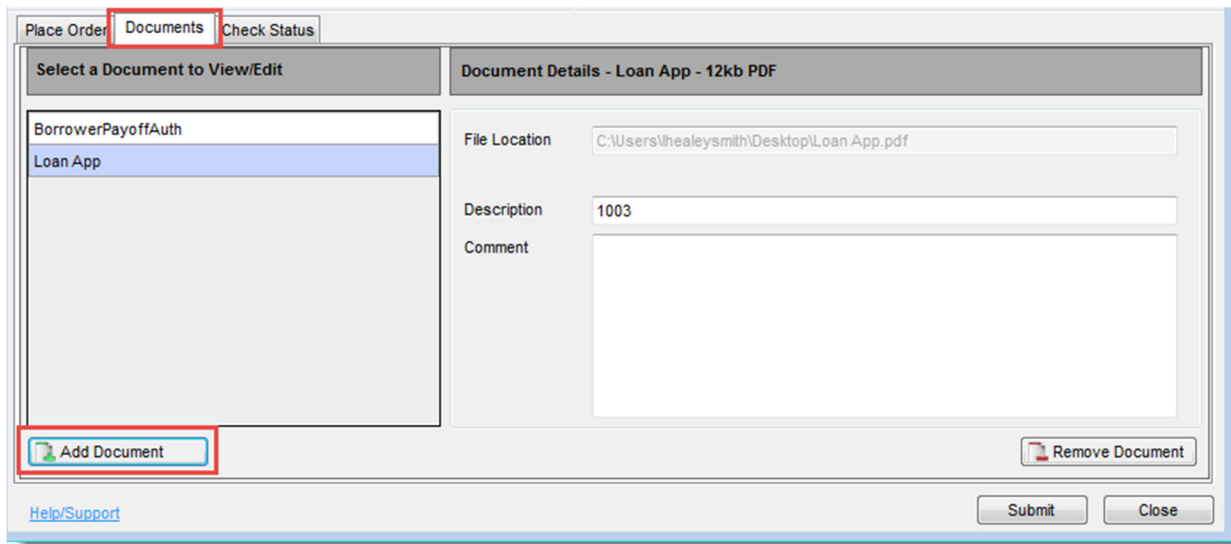


A document can be added from the user's hard drive or the eFolder for the Encompass loan. A description of the document must be entered in the **Description** field.




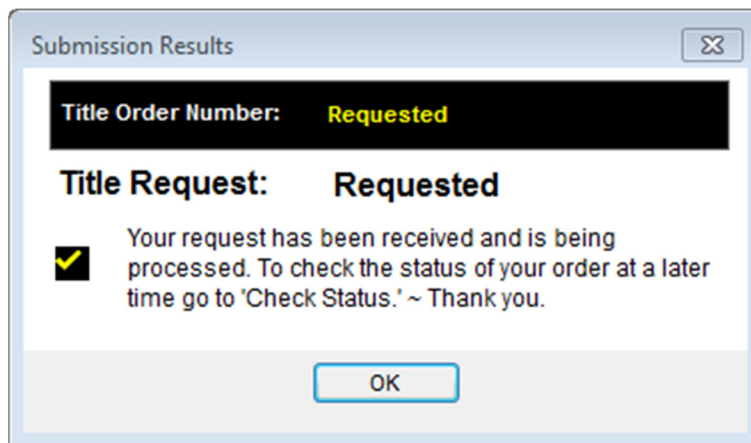
Selecting the  icon removes the document from the **Place Order** screen.

Selecting the **Documents** tab allows the Encompass user to add multiple documents to the order request.

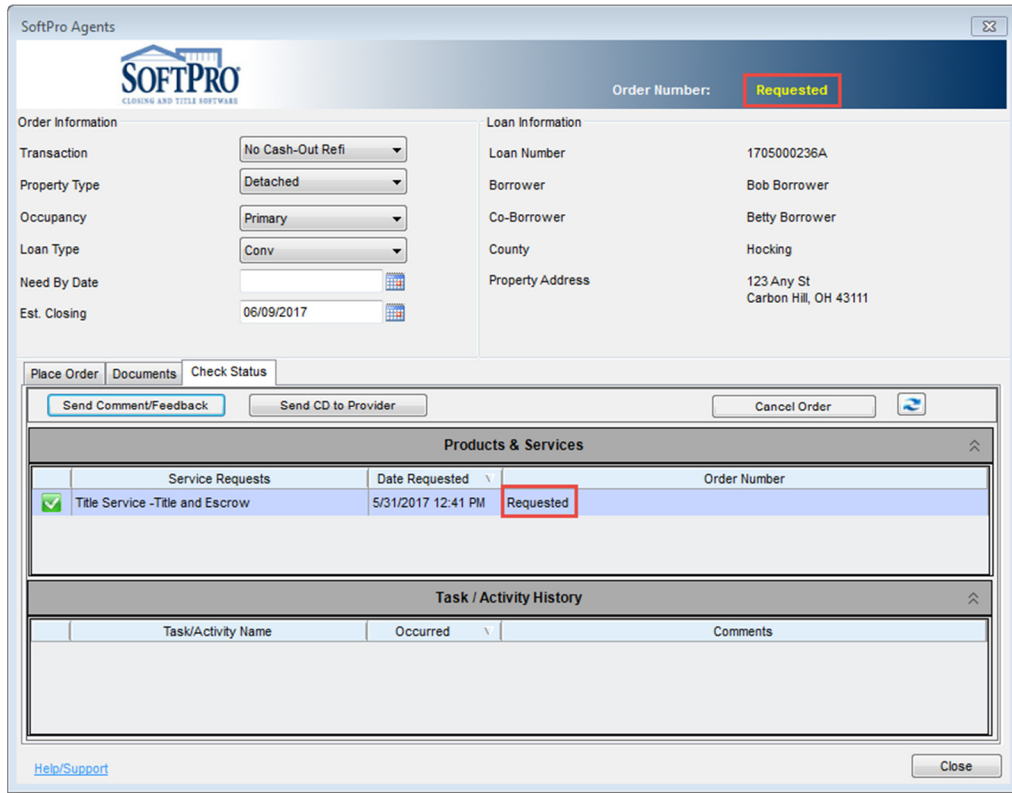


Submitting the Order Request

Selecting  sends the order request to the **Provider** and a **Submission Results** dialogue box appears to indicate whether the order request has been received by the Provider.

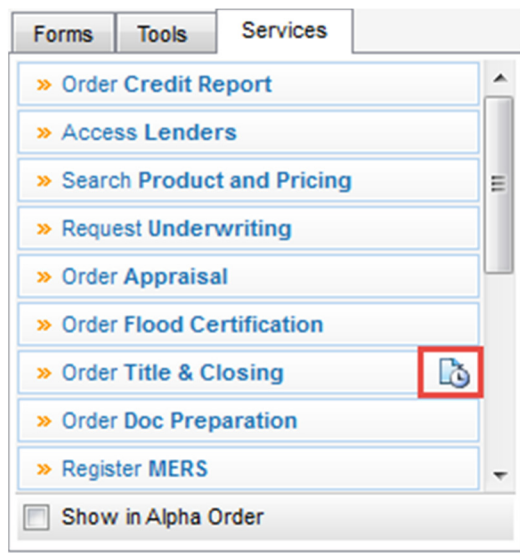


Once an order request has been submitted, the **Place Order** tab is disabled and the **Check Status** tab is activated to show the product requested, the date and time of the request and the Order Number. Until the order request has been accepted by the Provider, the Order Number in the **Check Status** tab and in the **Order Number** field at the top of the Order screen is "Requested".

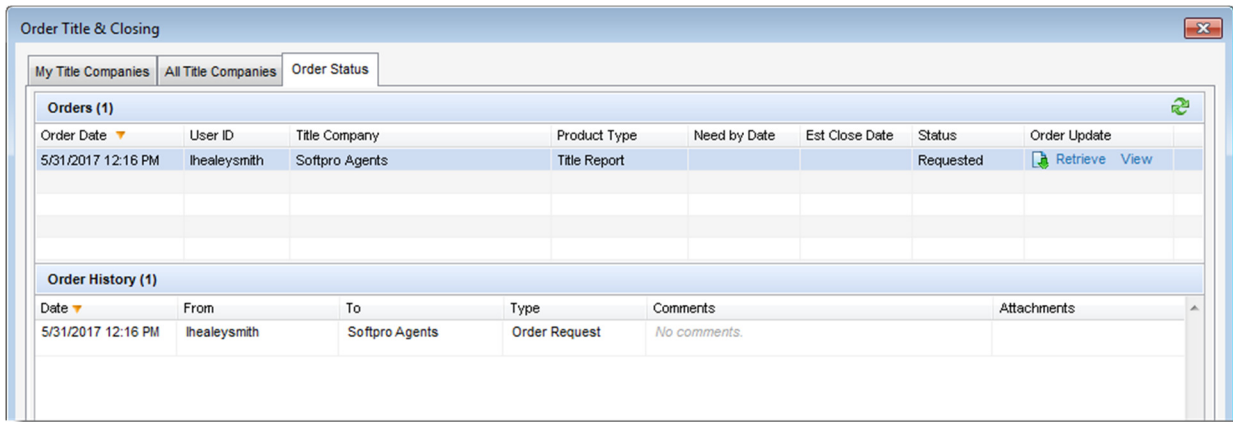


Returning to the Encompass Order

Closing the **SoftPro Agents** order screen returns the user to the Encompass loan file. A **Check Status** icon will now display on the **Order Title & Closing** service in the Encompass loan file.



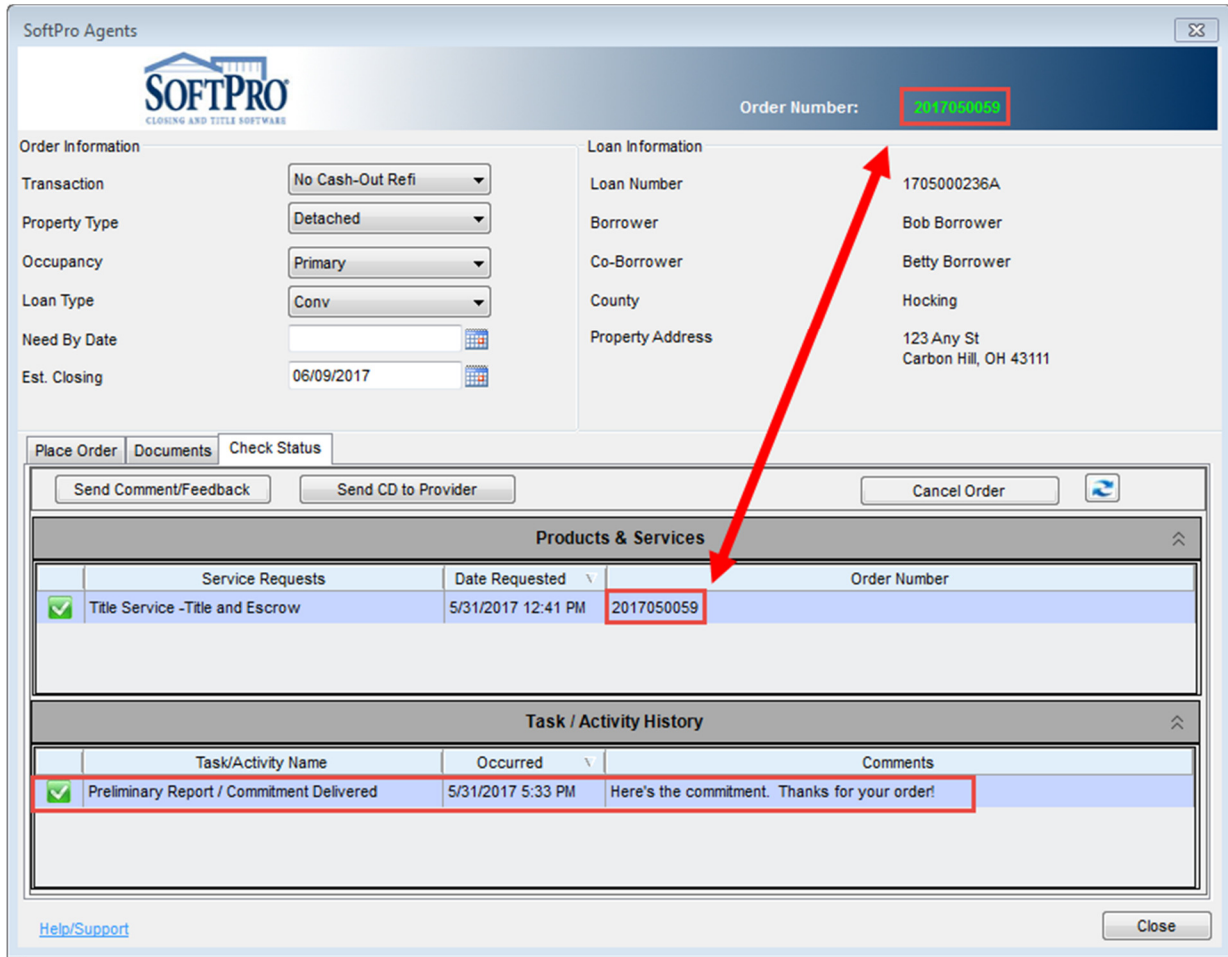
The next time the Encompass user selects this service, the **Order Title & Closing** screen will open to the **Order Status** tab. This shows the Encompass user what has been ordered and the **Order History**.



Order Updates in Encompass

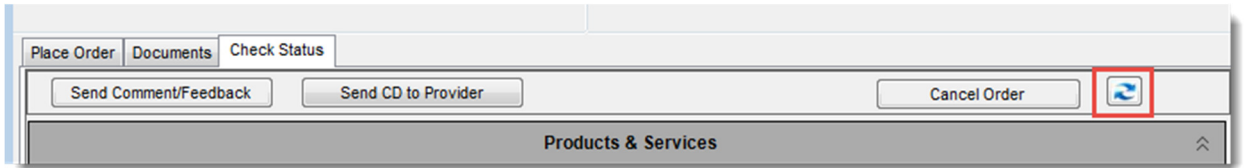
Receiving SoftPro Agent Communications

To see any communications sent by the SoftPro user, the Encompass user selects the **My Title Companies** tab and **SoftPro Agents**. This opens the **SoftPro Agents** order screen with the **Check Status** tab. If the order has been accepted by the SoftPro Agent, the **Order Number** will be displayed in the Order Number fields. Any **Communication** from the **SoftPro Agent**, will be displayed in the **Task/Activity History** section.

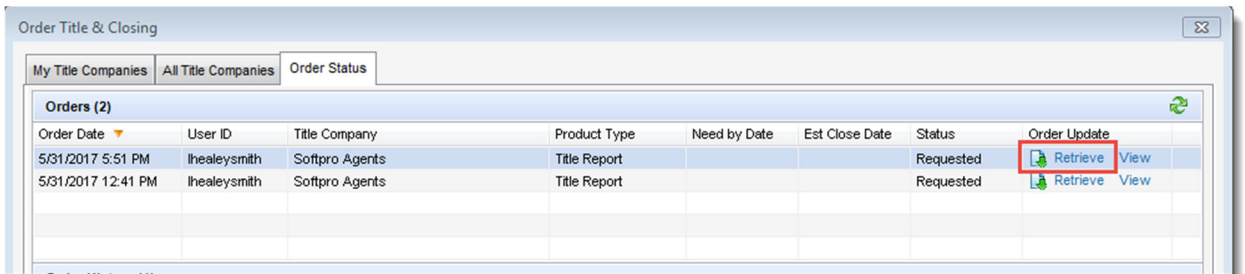


Retrieving a Document

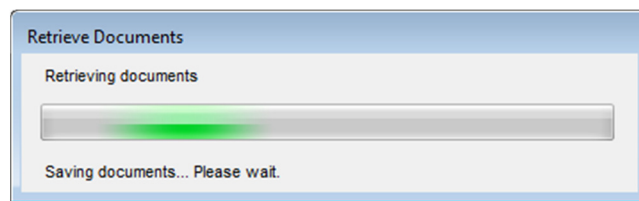
1. Open the **SoftPro Agents** order screen using the **Order Title & Closing** service in the Encompass loan file. This step makes any document sent with a Communication available to be retrieved into the Encompass loan's **eFolder**. If the Communication was sent while the **SoftPro Agents** order screen is open, use the **Refresh** button to update the order screen.



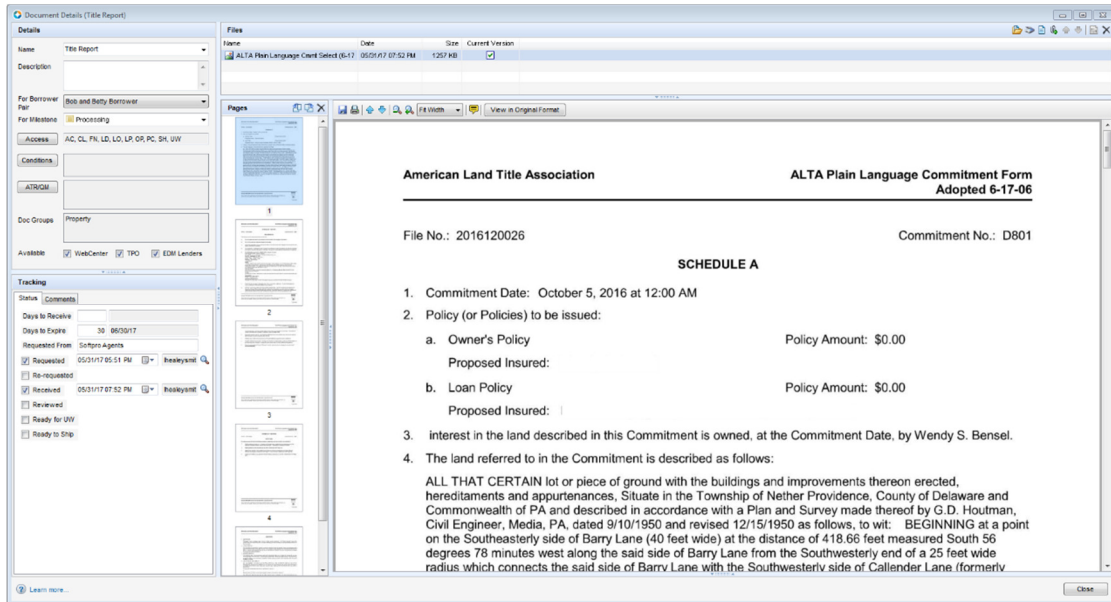
2. Close the **SoftPro Agents** order screen and select the **Order Title & Closing** service again to access the **Order Status** tab. Select the **Retrieve** link to upload the document into Encompass.



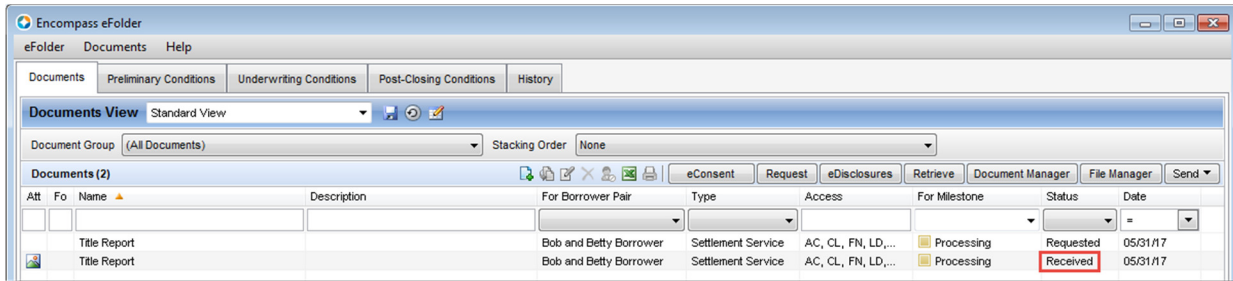
3. A **Retrieving Documents** screen and progress bar will display while the document is being uploaded.



4. The **Documents Details** screen will open and will display the document.



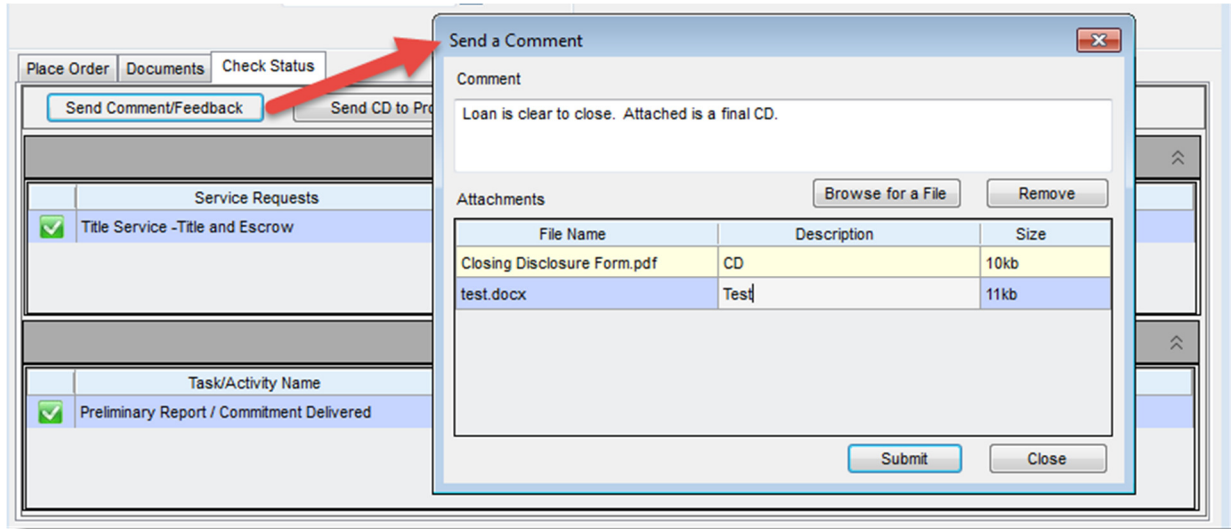
In the **eFolder**, the Encompass user will see the document with a status of **Received**.



Documents may only be retrieved once. After they have been successfully retrieved the Encompass user can access the documents in the loan file's **eFolder**.

Sending Documents and Comments to a SoftPro Agent

An Encompass user can send comments and documents using the **Send Comment/Feedback** button on the Check Status tab of the **SoftPro Agents** order screen.



Multiple documents can be attached. The integration supports .pdf, .doc, .docx, .jpg, .bmp, .tiff, and .html documents. Note that sending documents or comments does not change the **Task/Activity History** grid. This grid is only to show the tasks that have been completed by the **SoftPro Agent** for the order.

Managing New Orders in 360

Receiving a New Order

When a new order request has been submitted by an Encompass customer, an email notification is sent to the Notification Email Address¹ for the Provider. An example of the email notification is attached at **Appendix B**.

The Queue

The 360 Queue displays a new Encompass order as a **New** transaction.

Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On	Completed On	Sent To	Category	Description	Transaction Number
Elle Mae	Encompass	New			Officer Encompass	5/31/2017 12:41 PM		417101\Default\test\Main	Order Origination	Borrower, Bob, 123 Any St, Carbon Hill, OH, Title and Escrow	417101-60-170531-016091

The **Sent To** column displays SoftPro customer account number and profile path as configured when the Encompass service was set up.

The Review Screen

After opening the New Transaction, the Review screen appears.

The Review screen displays the following information:

- 1**: **Linked To:** dropdown menu.
- 2**: **Groups** sidebar menu.
- 3**: **Data** table with columns: Name, Current Value, New Value.
- 4**: **Value** table with columns: Name, Value.
- 5**: **Documents** table with columns: View, Copy, Description, File Name, File Size, Transferred.

Name	Current Value	New Value
Settlement Type		CDF
Order Type		Title & Escrow
Purchase Price		0
Transaction Type		Refinance
Settlement Date		6/9/2017

Name	Value
Office	Trusty Title and Closing - Alexandria, VA
Products ordered	Title and Escrow

View	Copy	Description	File Name	File Size	Transferred
<input checked="" type="checkbox"/>		Payoff Authorization	BorrowerPayoffAuth.pdf	11851	100%

¹ The Notification Email Address is created when a SoftPro customer is set up to receive Encompass orders.

Linking Transaction to an Order (1)

Before you can import the data and documents, the new transaction must be linked to an Order in Select. Selecting **New Order** opens the Create Order screen or you can use **Order Search** to open the Search screen and link the transaction to an existing Order. Any orders already opened in Select, will display in the **Linked To:** dropdown box for selection. Once an order number displays in **Linked To:**, the data and documents in the Review screen are available for accepting into ProForm.

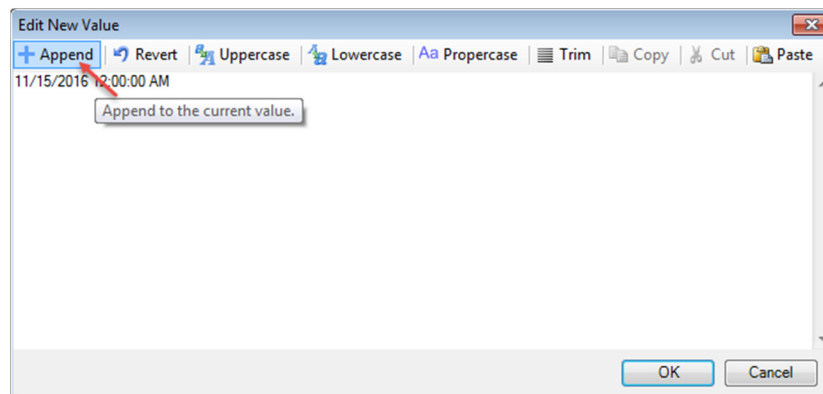
Groups Section (2)

In the Groups Section, the data from Encompass is grouped by category and contact type for easier navigation to a desired field or group of fields. Selecting a **Group** will display only that **Group's** data in the adjacent Data Section. Selecting **All** in the Group tree will display all the data that has been submitted from the new Encompass order.

Data Section (3)

The Data Section displays the data sent from the Encompass order in the **New Value** column. This data has been mapped to the fields listed in the **Name** column. Any data that already exists in the Select Order will display in the **Current Value** column. By default, all the data from the encompass order is selected for importing into the linked ProForm order.

- Using the scroll bar on the right side of the Data Section allows you to review the data for the **Group(s)** selected in the **Groups** section.
- The checkbox to the left of each field **Name** can be unchecked to exclude the Encompass **New Value** from being imported into the linked order. All data can be included or excluded by selecting the checkbox in the Data Section header.
- The **Edit** icon to the right of each **New Value** opens the **Edit New Value** window where you can change the **New Value** to be imported for that field. Hovering your cursor over the options at the top of the window opens a description of each editing feature in this window.



Notes Section (4)

The Encompass user can send comments with a new order. These comments will show up in the Notes section of the Review screen. This Section also displays the following information:

- **Office**
- **Products ordered**
- **Comments**

By default, these notes and comments are selected to be imported into the linked order. To exclude these notes from being imported, you can uncheck **Add to ProForm Notes**.

Documents Section (5)

Any documents that the Encompass customer sends with the new order are listed in the Documents section of the Review screen. Clicking the **PDF icon** opens the document in Adobe for viewing. Clicking the **Copy icon** copies the image of the document to a clipboard from which it can be pasted into an external application. By default, all documents are selected for importing into the linked order.

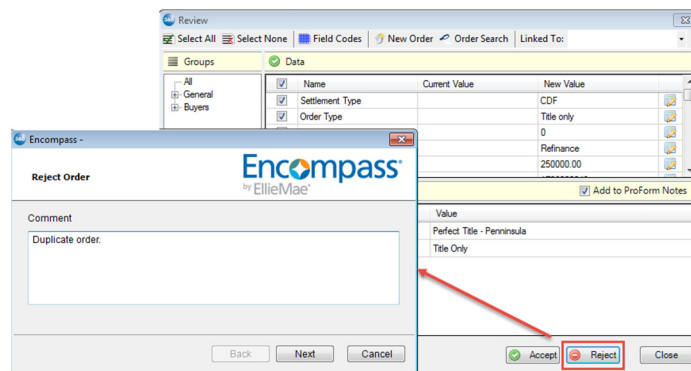
Accepting the Transaction

After the new transaction is linked to an order in ProForm, it can be accepted by selecting **Accept** in the lower right corner of the Review screen. This will cause the selected values to be imported into their respective fields in the linked order. Notes will be located in the Notes section of the order, and documents will be attached to the order and display in the Attachments screen. The Review screen will close when importing is completed, and the transaction status in the Queue will change to **In Progress**.

Upon acceptance of a new transaction, an email will automatically be sent to the Encompass user who sent the order. A sample email is shown at **Appendix C**.

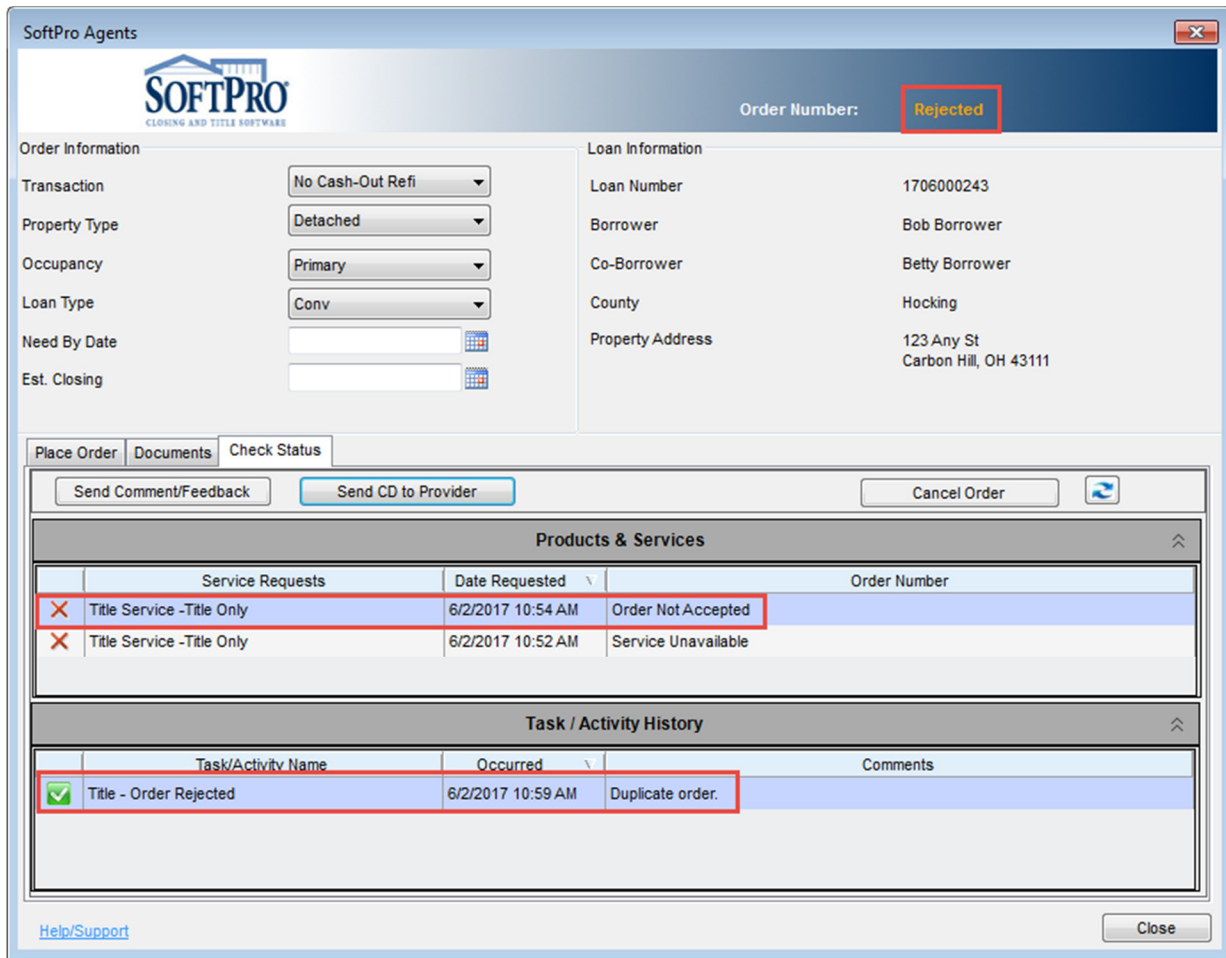
Rejecting the Transaction

To reject a new order, select **Reject** in the lower right corner of the Review screen. No data, notes or documents will import into the linked order. The **Reject Order** screen opens to allow comments to be sent with the communication to the Encompass lender.



Clicking **Next** opens the **Reject Order** screen. The **Set the order status to Rejected now** checkbox must be checked to enable the **Submit** button. The transaction status in the Queue will change to **Rejected** and the transaction can no longer be opened.

In the **SoftPro Agents** screen, the lender see the **Order Number** change to **Rejected**. The **Products & Services** section will have a time-stamped entry that the order was not accepted and the **Task/Activity History** will display the comment sent with the rejection communication.



The Encompass lender will be able to send a new order the next time the **SoftPro Agents** screen is opened from the Encompass loan file.

Communicating with the Encompass Customer

Order Summary Screen in 360

The Encompass for Agency integration allows a SoftPro user to send notifications, comments and documents to an Encompass customer. After an Encompass order has been accepted, opening the transaction opens the Order Summary screen. The Order Summary grid keeps a record of each communication, the date and time sent or received in 360 and the email address of the person who created it. In addition, the SoftPro user uses this screen to send a communication to the Encompass customer, review any document or comment sent from the Encompass customer to 360, to cancel the order and to close the order by marking it complete.

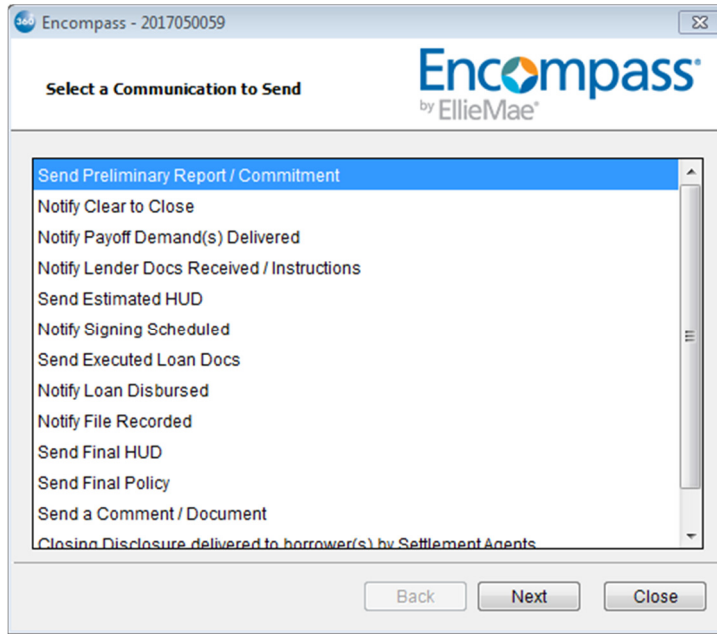
Action	Communication Title	Sent/Received On	Created By
✓	New Order Request	05/31/2017 12:41:09	lizanne.healey-smith@softprocorp....

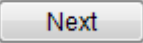
Sending a Communication

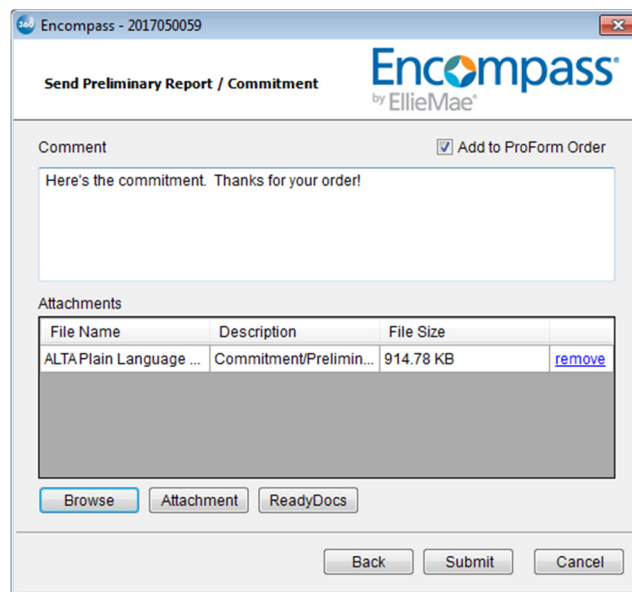
To send a notification, document or comment to the Encompass customer, select the



button. This opens a screen to **Select a Communication to Send**.

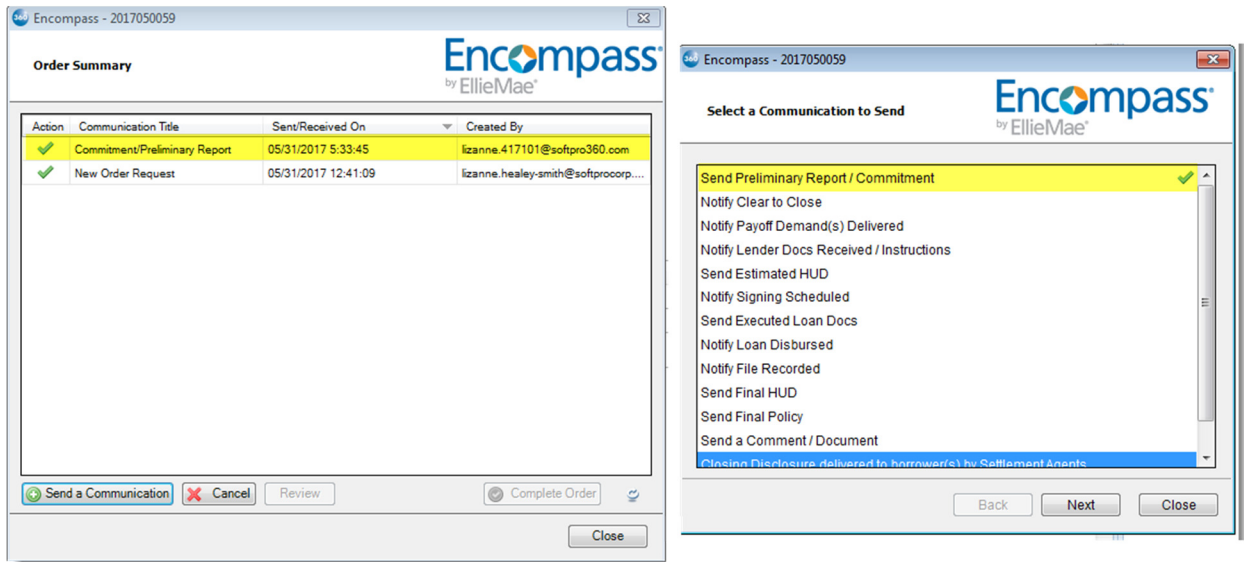


This screen lists the communications that can be sent to the Encompass customer. Selecting a communication and  opens a screen to add a comment or attach a document to the communication.




The **Add to ProForm Order** checkbox gives the user the option to add a note to the ProForm order with the details of the Communication. It is checked by default. Clicking the **Submit** button sends the communication to the Encompass customer.

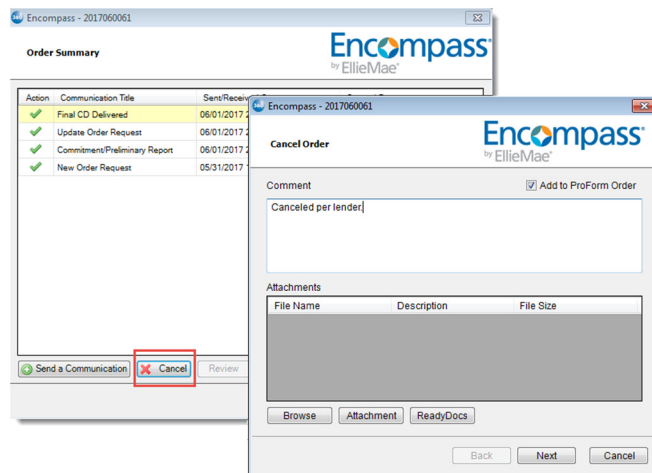
The **Communication** is added to the **Order Summary** screen and a  icon is added to the Communication in the **Select a Communication to Send** screen.



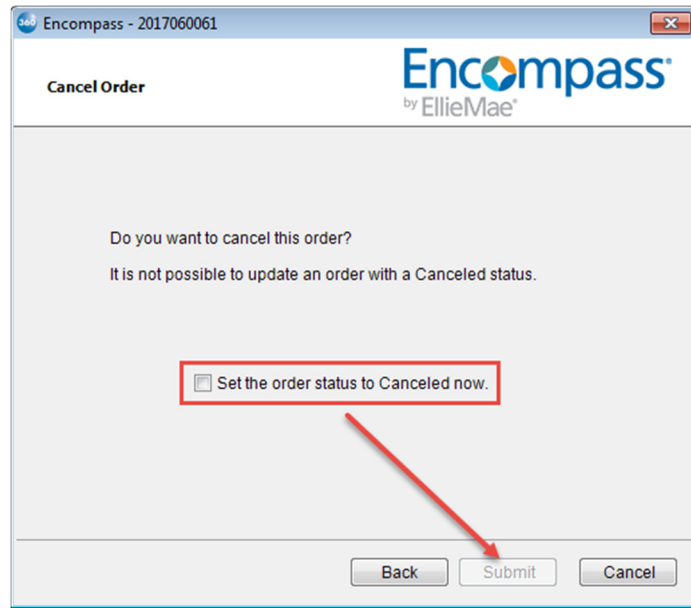
With the exception of the **Send a Comment/Document**, each communication type can only be sent once. The **Send a Comment/Document** communication may be sent multiple times.

Canceling an Order

An order can be canceled at any time. Selecting the  button opens the **Cancel Order** screen to comments or documents to the communication.




Selecting **Next** opens the Cancel Order screen. The checkbox to **Set order status to Canceled now** must be checked in order to **Submit** the communication to the Encompass lender.



Revisions

Date	Rev'd by	Details
02/27/2019	LJenkins	Prerequisites: Changed to add on-line registration URL Appendix A: Replaced with screen shot of on-line registration page

Appendix A



[PRODUCTS ▾](#)
[SERVICES ▾](#)
[SUPPORT ▾](#)
[ABOUT ▾](#)

Improve efficiency and productivity with SoftPro 360's integration in Ellie Mae's Encompass®

With SoftPro's integration within Encompass for title Agency, Encompass users can now send title, escrow and closing service orders directly to SoftPro service providers, without leaving the Encompass loan file.

This integration provides a new level of efficiency and productivity, allowing you to:

- Eliminate the need for lenders to fax or email order requests
- Provide a secure method of transmitting private personal information between lender and title service provider
- Reduce human error and inefficiencies caused by re-keying data
- Allow SoftPro users to securely send key title and closing documents to an Encompass user directly from a ProForm order
- Enable Encompass users to retrieve key title and closing documents from a SoftPro service provider and save them into the loan's eFolder without the need to scan or browse.

Ready to try? Complete the form below:

First Name*

Last Name*

Company Name*

Street Address*

Phone Number*

City*

State/Region*

Please Select ▾

Email*

If you know your SoftPro serial number, please provide it below.

Are you a current SoftPro Live customer?

Yes
 No
 Don't know

Do you want more than one location/name to appear in the Encompass LOS?

Yes
 No

Upon receiving an order from Encompass, please provide your company email/DL you would like the notifications sent.

Appendix B

From: noreply@softpro360.com
Sent: Wednesday, May 31, 2017 12:41 PM
To: Healey-Smith, Lizanne <lizanne.healey-smith@Softprocorp.com>
Subject: New Order Placed - Ellie Mae Encompass - Loan Number: 1705000236A

New Order Placed - Ellie Mae Encompass

Ordered By	
Company	
Name	
Phone	
Email	
Order Details	
Transaction Type	Refinance
Estimated Closing Date	6/9/2017
Need by Date	
Sales Price	\$0.00
Loan Amount	\$250,000.00
Loan Number	1705000236A
Order Type	TitleAndEscrow
TitleAndEscrow Office	Trusty Title and Closing - Alexandria, VA
TitleAndEscrow Officer	
TitleAndEscrow Product Type	Title and Escrow
Property Details	
Property Type	Single Family
Property Street Address	123 Any St
City, State, Zip	Carbon Hill, OH 43111
Property County	Hocking
Buyer/Borrower 1	
Name	Bob Borrower
Phone	(888)123-4567
Cell Phone	
Work Phone	
Email	email@email.com
SSN Last 4	
Mailing Street Address	123 Anywhere St
Mailing City, State, Zip	Carbon Hill, OH 43111
Buyer/Borrower 2	
Name	Betty Borrower
SSN Last 4	
Instructions	
Please order the payoff. Thanks!	

Appendix C

From: noreply@softpro360.com
Sent: Wednesday, May 31, 2017 4:45 PM
To: Healey-Smith, Lizanne <lizanne.healey-smith@Softprocorp.com>
Subject: New Order Confirmation

Hello ,

Thank you for placing your order with Trusty Title and Closing - Alexandria, VA.

We have assigned order reference number **2017050059** to your transaction and your order is in progress.

Date Sent: 5/31/2017

Property Details:
Bob Borrower 123 Any St
Carbon Hill, OH 43111

If we may be of further assistance to you, please contact your Trusty Title and Closing - Alexandria, VA representative.

Thank you,

Trusty Title and Closing - Alexandria, VA