

# **ENCOMPASS® FOR AGENCY**

15

User Guide |June 19, 2017

Last Revised 2/27/2019

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# Introduction

With its Encompass<sup>®</sup> suite of products, Ellie Mae<sup>®</sup> is a leading provider of loan origination software solutions for the residential mortgage industry. With SoftPro's *Encompass<sup>®</sup> for Agency* integration, Encompass lenders can now send title, escrow and closing service orders directly to SoftPro<sup>®</sup> 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 <a href="http://info.softprocorp.com/encompass-configuration">http://info.softprocorp.com/encompass-configuration</a>. 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.

ncompass View Loan Forms V	erifs	Tools	Services Help	
Home Pipeline Loan Trades (	Contact	s Das	Credit Report	
			Lenders	
Borrowers April Test			Product and Pricing	_
123 Anywhere St.		1st Loar	Underwriting	
Raleigh, NC 27609		Loar	Appraisal	
	-		Flood Certification	
Alerts & Messages Log		Borro	Title & Closing	
File Started 04/25	/17	Chann	Doc Preparation	
Send to processing	_	Curren	MERS	_
Cond. Approval			AVM	
Resubmittal		Borro	Mortgage Insurance	
Approval		Borro	Fraud/Audit Services	88
Ready for Docs		Туре	Mortgage Signing	~
Docs Out	_	First N	Tax Services	
Funding		Middle	HMDA Management	
Purchasing		Last N	-	×
Completion		SSN	Verifications	
	_	DOB	My Custom Links	
	_	Home F		- 1
		Work P		
		Cell		- 1
		Marital		- 1
	_	Home E		
	_	Work E		
	1			
Forms Tools Services			Security Number Verification	
» Order Credit Report	^	Borrow The Pu	ver pose of the Transaction	- 1
» Access Lenders			g a mortgage from the company	
» Search Product and Pricing			nsent is valid for 60 days	
» Request Underwriting		_	tgage Service Banking Service	vice
» Order Appraisal			kground Check License Req	
		Cre	dit Check Other	
» Order Flood Certification	=	Comp	any's Information Lender/Bro	er Data
» Order Title & Closing	-	Name		
» Order Doc Preparation		Addres		
» Register MERS		City	•	
» Order AVM		State	Zip	
» Order Mortgage Insurance				
» Order Fraud/Audit Services		Prese	nt Address	
» Request Mortgage Signing		Addres	s	
» Order Tax Services		City		

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

Title Companies All T	itle Companies			
Search Title Compani	es			
Company/Agent Name Service Area	SoftPro Property State/County NC / Wake	Nationwide	Update Search	
All Title Companies (1	)			Add to My Title Companies
ompany Name 🔺				Profile
oftPro Agents				More Info

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

C	Order Title & Closing					
I	My Title Companies	All Title Companies				
	My Title Companies (1)					
	Company Name					
	SoftPro Agents					
ų						

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 Next, 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.

SoftPro Agents		
SOFTPRO	Order Number:	Order Pending Submission
All SoftPro Agents My SoftPro Agents		
SoftPro Agent Name:		
Best Title Agency, St. Louis, MO		Add to My SoftPro Agents
Best Title Agency, St. Louis, MO		
Colege Cosing Services Dam Good Land & Tite Co. Evergreen Tite Services Fantasic Tite Agency First Tite Company - LA County First Tite Company - Orange County Happy Land Tite Abstract Co Independence Tite - Nain Independence Tite - Nain NC Lovely Land Tite Company Pefect Tite - Anirghy, NC Lovely Land Tite Company Pefect Tite - Riverside Perfect Tite - Anirghy Perfect Tite - Parnisula Perfect Tite - Suburban Sensational Settlement & Tite Sensational Settlement & Tite Terrific Tite Agency - Frankin, PA		E
		Next
Help/Support		Close

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

SoftPro Agents					
SOFTPRO					
All SoftPro Agents My SoftPro Agents					
SoftPro Agent Name: ale					
Independence Title - Raleigh, NC Trust Title & Closing, Alexandria VA - Downtown Office					
Trusty Title and Closing - Alexandria, VA					

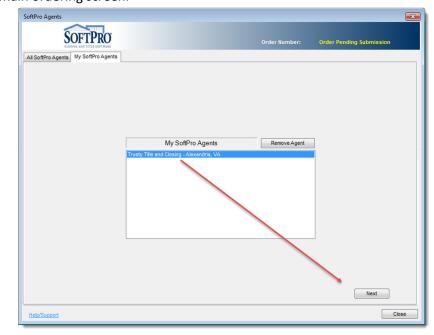
2. After filtering the list (1), the Encompass user can select the correct SoftPro Agent (2).

SoftPro Agents		<b>×</b>
SOFTPRO	Order Number:	Order Pending Submission
All SoftPro Agents My SoftPro Agents		
SoftPro Agent Name: ale	]	Add to My SoftPro Agents
Trusty Title and Closing - Alexandria, VA		Add to my SoliPio Agents
Independence Title - Raleigh, NC Trust Title & Closing, Alexandria VA - Downtown Office Trusty Title and Closing - Alexandria, VA		

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

SoftPro Agents				×
SOFTPRO		Order Number:	Order Pending Submission	
All SoftPro Agents My SoftPro Agents				
_	My SoftPro Agents	Remove Agent	]	
	Trusty Title and Closing - Alexandria, VA			
Help/Support			Clos	e

4. Selecting the **SoftPro Agent** and **Next** 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 Next 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.)

Encompass - Build 17.2.0.5 - https://BE11083759.ea.elliemae.net\$BE11083759 - Ihealeysmith - 3011083759					
Encompass View Loan Forms Verifs	Tools Services Help				
Home Pipeline Loan Trades Contacts Dashboard Reports					
8 Borrowers Bob and Betty Borrower	• 2				
123 Any St Carbon Hill, OH 43111	1st         Loan #: 1705000235A         LTV: /           Loan Amount: \$250,000.00         DTI: /				
Alerts & Messages Log	Borrower Summary - Origination				
File Started 05/30/17 Send to processing Submittal	Cash-Out Refi Construction - Perm S Order Title & Closing				
Cond. Approval     Resubmittal	Ld My Title Companies All Title Companies				
Approval     Ready for Docs	My Title Companies (1)				
Docs Out	Company Name A SoftPro Agents				
Funding	A				
Shipping					
Purchasing     Completion					
Forms Tools Services	Pu Da				
» Order Credit Report	Lo				
» Access Lenders	Es				
» Search Product and Pricing	Bo				
» Request Underwriting	Ra				
» Order Appraisal	Lo				
» Order Flood Certification	# d				
» Order Title & Closing	Lo				
» Order Doc Preparation	Ra				
» Register MERS					
Show in Alpha Order					

## Selecting a Provider

In the **My SoftPro Agents** tab, select the agent who will receive the order and <u>Next</u> 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.)

SoftPro Agents			<b>—</b>
SOFTPRO		Order Number:	Order Pending Submission
All SoftPro Agents My SoftPro Agents			
	My SoftPro Agents	Remove Agent	
	Trusty Title and Closing - Alexandria, VA Perfect Title - Mountainview		
	Perfect Title - Mountainview		
			Next
Help/Support			Close

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.

SoftPro Agents			×		
SOFTPRO		Order Number:	Order Pending Submission		
Order Information		Loan Information			
Transaction	No Cash-Out Refi 🔹	Loan Number	1705000235A		
Property Type	Detached -	Borrower	Bob Borrower		
Occupancy	Primary -	Co-Borrower	Betty Borrower		
Loan Type	Conv 🔻	County	Hocking		
Need By Date		Property Address	123 Any St Carbon Hill, OH 43111		
Est. Closing	06/09/2017				
Place Order Documents Check Status					
General Comments:					
Provider: Trus	ty Title and Closing - Alexandria, VA				
	Change Provider				

### The Place Order Tab

#### Changing a Provider

In	the	Place	Order	Tab,	the	selected	Provide	er	can l	be	chang	ed	by	sele	ectii	ng	the
			Change Pr	ovider			button.	This	s takes	the	user	back	to	the	My	Sof	tPro

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 Submit button.

Place Order r	Documents Check Status	
		General Comments:
Provider:	Trusty Title and Closing - Alexandria, VA Change Provider	
Products (3)		Add Document
Escrow (		File Location
Title and I	Escrow	Description
Help/Support		Submit Close

#### Adding a Comment or Document to the Order

Selecting a Product also enables the **General Comments** text field and the Add Document 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 Add Document button. This opens the **Add Attachment** screen.

Pla	ce Order	Documents	Check Status			
						General Comments:
Pr	ovider:		Trusty Title	and Closing - Alexand Change Provider	dria, VA	
	Add Attac	:hment			<b>—</b>	
	to this of Select	rder: Action Browse from		ment you wish to attar older	ch	File Location Description
			Continue	Cancel		Submit Close

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.

Place Order Docume	ents Check Status		
		General Commer	nts:
Provider:	Trusty Title and Closing - Alexandria, VA	Please order the	a payoff. Thanks!
	Change Provider		
Products (3)			
Title Only		🔜 Add Docu	ment
Escrow Only		File Location	C:\Users\lhealeysmith\Desktop\BorrowerPayoffAuth.pdf
Title and Escrov	W	Description	Payoff Authorization
		Description	ayon Adhonzaton
[			
Help/Support			Submit Close

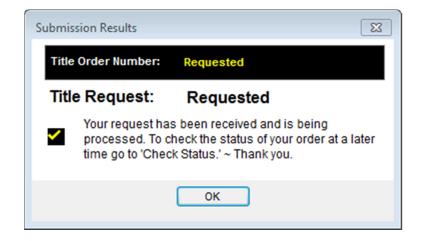
Selecting the  $\bowtie$  icon removes the document from the **Place Order** screen.

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

Place Order Documents Check Status		
Select a Document to View/Edit	Document Det	ails - Loan App - 12kb PDF
BorrowerPayoffAuth Loan App	File Location	C:\Users\lhealeysmith\Desktop\Loan App.pdf
	Description Comment	1003
Add Document	L	Remove Document
Help/Support		Submit Close

#### Submitting the Order Request

Selecting Submit 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".

SoftPro Agents				X
SOFTP	RO		Order Number:	tequested
Order Information		Loan Information		
Transaction	No Cash-Out Refi 🔹	Loan Number	17	05000236A
Property Type	Detached -	Borrower	Bo	b Borrower
Occupancy	Primary -	Co-Borrower	Be	tty Borrower
Loan Type	Conv 🗸	County	Но	cking
Need By Date		Property Address		3 Any St rbon Hill, OH 43111
Est. Closing	06/09/2017			
Place Order Documents Ct Send Comment/Feedback	k Send CD to Provider			ancel Order
		Products & Services		*
Servio	ce Requests Date Req	uested V	Order Nur	nber
Title Service -Title and	Escrow 5/31/2017	12:41 PM Requested		
		Task / Activity History		*
Task/A	ctivity Name Occur	rred V	Commen	ts
Help/Support				Close

## 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.

Forms	Tools	Services		
» Orde	r Credit Re	eport		^
» Acce	ss Lende	rs		
» Sear	ch Produc	t and Pricing	I	Ξ
» Requ	est Under	writing		
» Orde	r Appraisa	ıl		
» Orde	r Flood Ce	rtification		
» Orde	r Title & C	losing	lo 🗋	
» Orde	r Doc Prep	aration		
» Regis	ter MERS			Ŧ
Show	v in Alpha C	Order		

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**.

Orders (1)								â
Order Date 🔻	User ID	Title Company	Product T	ype Need by Date	Est Close Date	Status	Order Update	
5/31/2017 12:16 PM	lhealeysmith	Softpro Agents	Title Repo	rt		Requested	Retrieve Vie	w
Order History (1)								
Date 🔻	From	То	Туре	Comments		A	ttachments	
5/31/2017 12:16 PM	Ihealeysmith	Softpro Agents	Order Request	No comments.				

# **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.

SoftPro Agents						X
SOFTPRO	ŗ			Order Number:		
Order Information		L	oan Information			
Transaction	No Cash-Out Refi	- I	oan Number	1	1705000236A	
Property Type	Detached	<b>-</b>	Borrower		Bob Borrower	
Occupancy	Primary	•	Co-Borrower		Betty Borrower	
Loan Type	Conv	•	County		Hocking	
Need By Date			Property Address		123 Any St Carbon Hill, OH 43111	
Est. Closing	06/09/2017					
Place Order Documents Check S	Status					
Send Comment/Feedback	Send CD to Pro	vider			Cancel Order	2
		Produc	ts & Services			\$
Service Red	quests	Date Requested		Orde	er Number	
Title Service -Title and Escre	ow	5/31/2017 12:41 PM	2017050059			
		Task / Ac	ctivity History			*
Task/Activity	v Name	Occurred V		Co	mments	
Preliminary Report / Commitm	nent Delivered	5/31/2017 5:33 PM	Here's the comm	nitment. Thanks for you	ır order!	
Help/Support						Close

### **Retrieving a Document**

 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.

Place Order Documents Check Status			
Send Comment/Feedback	Send CD to Provider	Cancel Order 💽	
	Products & Service	\$	\$

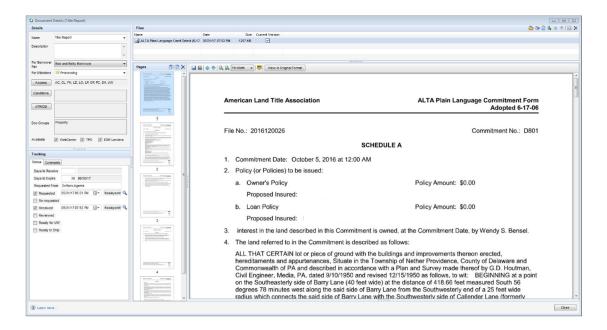
2. Close the **SoftPro Agents** order screen and select the **Order Title & Closing** service again to access the **Order Status** tab. Select the **Retrieve** link to upload the document into Encompass.

Orders (2)           Order Date ▼         User ID         Title Company         Product Type         Need by Date         Est Close Date         Status         Order I	2
	odate
5/31/2017 5:51 PM Ihealeysmith Softpro Agents 🛛 Title Report Requested [ 🛃 Re	ieve View
5/31/2017 12:41 PM Ihealeysmith Softpro Agents Title Report Requested 🚺 Re	ieve View

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

	Retrieve Documents
	Retrieving documents
ana wait	Saving documents. Please wait
ase wait.	Saving documents Please wait.

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**.

0	C Encompass eFolder													
ef	eFolder Documents Help													
1	ocument)	Preliminary Conditions	Underwriting Conditions	Post-Closing Conditions	History									
(	Docum	ents View Standard View	-	201										
	Documen	Group (All Documents)		✓ Sta	cking Orde	er None				•				
	Docume	nts (2)			🔉 🕼	r 🗙 🐍 🗷 🔒 📄	eConsent	Reque	st eDisclosures	Retrieve	Document Ma	nager File	Manager	Send 🔻
А	tt Fo	Name 🔺	Description		For	Borrower Pair	Туре		Access	For Milest	one	Status	Date	
						-		-			-		▼ =	-
		Title Report			Bok	and Betty Borrower	Settlement Se	rvice	AC, CL, FN, LD,	Proces	ssing	Requested	05/31/17	
	2	Title Report			Bok	and Betty Borrower	Settlement Se	rvice	AC, CL, FN, LD,	Proces	ssing	Received	05/31/17	·

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.

	Send a Comment		×	
Place Order Documents Check Status	Comment			
Send Comment/Feedback Send CD to Pro	Loan is clear to close. Attached is a	final CD.		
				~
Service Requests	Attachments	Browse for a File	Remove	
Title Service -Title and Escrow	File Name	Description	Size	
	Closing Disclosure Form.pdf	CD	10kb	
	test.docx	Test	11kb	
<u></u>				~
Task/Activity Name				
Preliminary Report / Commitment Delivered				
	L	Submit	Close	
L				

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 Address<sup>1</sup> 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.



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.

😴 Select All 🗮 Sele	ect None 🛛 🎆 Field Codes 📝	New Order 🖌 Order Searc	th Linked To:	•
Groups	📀 Data			
All	Name	Current Value	New Value	
i General 	Settlement Type		CDF	
	Order Type		Title & Escrow	
	V Purchase Price	3	0	
	Transaction Type		Refinance	
	Settlement Date		6/9/2017	🔯 🖕
Name Office		Value Trusty Title and Clos	ing Alexandria, VA	A 
Products ordered		Title and Escrow	4	
Documents				
View Copy	/ Description	File Name	File Size	Transferred
	Payoff Authorization	BorrowerPayoffAuth.pd	<del>Jf</del> 11851	100%
			📀 Accept 🥥 Reject	Close

<sup>&</sup>lt;sup>1</sup> 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 curser over the options at the top of the window opens a description of each editing feature in this window.

Edit New Value	<b>-X</b>
🕂 Append 🛛 🤊 Revert   🏂 Uppercase   🐁 Lowercase   Aa Propercase   🧮 Trim   🗈 Copy   🐰 Cut   😭	Paste
11/15/2016 12:00:00 AM	~
Append to the current value.	
	Ŧ
ОК Са	ncel

### 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.

	🚭 Review				٤	3
	😰 Select All 📑 Selec	ct None 🛛 🏬 Field Codes 🛛 햿 New	Order 🖉 Order Search	Linked To:	-	
	Groups	🖉 Data				
	Al	Name	Current Value	New Value		^
	General     General     General	Settlement Type		CDF	2	2
		Order Type		Title only	2	
Encompass -		-×	1	0		11
			-	Refinance		
		incompass <sup>®</sup>		250000.00		+
Reject Order	by	EllieMae*		Add to	ProForm Notes	;
Comment			Value			
Duplicate order.			Perfect Title - Penninsu	la		_
			Title Only			
	Back	Next Cancel		Accept C Reject	Close	

Clikcing **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.

SoftPro Agents			Orr	der Number:	Rejected		
Order Information		- Li	oan Information				
Transaction	No Cash-Out Refi	• L	.oan Number		1706000243		
Property Type	Detached		orrower		Bob Borrower		
Occupancy	Drimon		co-Borrower		Betty Borrower		
	Primary						
Loan Type	Conv		County		Hocking		
Need By Date		P	Property Address		123 Any St Carbon Hill, OH 43111		
Est. Closing							
Place Order Documents Check S	tatus						
Send Comment/Feedback	Send CD to Prov	vider			Cancel Order	2	
		Product	ts & Services			\$	
Service Req	uests	Date Requested V		Order Number			
X Title Service -Title Only		6/2/2017 10:54 AM	Order Not Accepted				
X Title Service -Title Only		6/2/2017 10:52 AM	Service Unavailable				
		Task / Ac	tivity History			*	
Task/Activity	Name	Occurred V		Com	ments		
Title - Order Rejected		6/2/2017 10:59 AM	Duplicate order.				
Help/Support	Help/Support Close						

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.

•	Encon	npass - 2017050059					8
	Order	Summary			by	EllieMae*	ass <sup>.</sup>
]	Action	Communication Title		Sent/Received On	~	Created By	
	<b>V</b>	New Order Request		05/31/2017 12:41:09		lizanne.healey-smith@softpr	ocorp
	Send	d a Communication	Cancel	Review		Complete Order	Ş
						CI	ose

### Sending a Communication

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

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

Encompass - 2017050059	X
Select a Communication to Send	Encompass <sup>•</sup> <sup>by</sup> EllieMae <sup>•</sup>
Cond Draliminary Danast / Commitment	
Send Preliminary Report / Commitment Notify Clear to Close	
Notify Payoff Demand(s) Delivered	
Notify Lender Docs Received / Instructions	
Send Estimated HUD	
00110 20111010011000	
Notify Signing Scheduled Send Executed Loan Docs	E
Notify Loan Disbursed	
Notify File Recorded Send Final HUD	
Send Final Policy	
Send a Comment / Document	
Closing Disclosure delivered to horrower(	s) by Settlement Agents
	Back Next Close

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

😔 Encompass - 2017050059			<b>x</b>
Send Preliminary Report		EllieMae <sup>®</sup>	ass <sup>.</sup>
Comment		Add to ProFo	rm Order
Here's the commitment.			
File Name	Description	File Size	
ALTA Plain Language	Commitment/Prelimin	914.78 KB	remove
Browse Attachn	nent ReadyDocs		
	Bac	k Submit	Cancel

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  $\checkmark$  icon is added to the Communication in the **Select a Communication to Send** screen.

Order	Summary		Encompass <sup>®</sup>	🕹 Encompass - 2017050059	
Action	Communication Title	Sent/Received On	Created By	Select a Communication to Send	Encompass <sup>w</sup> EllieMae <sup>*</sup>
✓	Commitment/Preliminary Report New Order Request	05/31/2017 5:33:45 05/31/2017 12:41:09	izanne.417101@softpro360.com	Send Preliminary Report / Commitment Notify Clear to Close Notify Payoff Demand(s) Delivered Notify Lender Docs Received / Instructions Send Estimated HUD Notify Signing Scheduled Send Executed Loan Docs Notify Loan Disbursed Notify File Recorded Send Final HUD Send Final Policy Send a Comment / Document	▲
🕜 Send	a Communication 🔀 Cancel	Review	Close	Closino Disclosure delivered to horrower(s) h	Back Next Close

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 *Cancel* button opens the **Cancel Order** screen to comments or documents to the communication.

Order	Summary		Encom <sup>by</sup> EllieMae <sup>*</sup>	pass <sup>.</sup>		
Action	Communication Title	Sent/Receiv	Encompass - 2017060061			6
<b>~</b>	Final CD Delivered	06/01/2017 2	Encompass - 2017000001	_		-
<	Update Order Request	06/01/2017 2		- E	incompa	IS
<	Commitment/Preliminary Report	06/01/2017 2	Cancel Order	by	EllieMae"	
<b>V</b>	New Order Request					
	rien ande riegeBk	05/31/2017 *	Comment Canceled per lender		☑ Add to ProForm 6	Orde
	The out regula	05/31/2017 *		iption	Add to ProForm of Add to ProForm of File Size	Orde

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**



### 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.

ODUCTS - S	ERVICES 👻	SUPPORT -	ABOUT
Ready to try? Com	plete the for	m below:	
First Name*		Last Name*	
Company Name*			
Street Address*		Phone Number*	
City*		State/Region*	
		Please Select	$\checkmark$
Email*			
lizanne.jenkins@softproc	orp.com		
If you know your SoftP	ro serial number	, please provide it be	elow.
Are you a current Softl	Pro Live custome	r?	
○ Yes			
○ No			
○ Don't know			
Do you want more tha	n one location/n	ame to appear in th	e Encompass
LOS?			
○Yes			
○ No			
Upon receiving an orde email/DL you would lik			our company

Submit

# **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!		

· · · · · <del>--- -</del>

# 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