

How to Enable Encompass Partner Connect[™] (EPC) for Flood

1. Start by logging in and under the Encompass menu, select Settings.



2. Then, click the link for Web Version Settings.

Encompass Settings					-	×
Encompass Settings Go to Recent	Import Help					
Settings Overview	Settings Overview					_
Company/Oser Setup External Company Setup Investor Connect Setup	The features and tools on the Company Settings an	d Personal Settings are used to define, co	nfigure, and manage Encompass.			
Loan Setup	Encompass - Web Version Settings					^
∎. eFolder Setup	Web Version Settings					
Docs Setup Secondary Setup	Encompass - Desktop Version Settings					
Contact Setup	Configuration			Maintenance		
Loan Templates Tables and Fees	Build Environment	Improve Produ	ctivity & Enhance Control			
Business Rules						
Dynamic Data Management	Company/User Setup	Loan Templates	Business Rules	System Administration		
System Administration	Organization/Users	Loan Programs	Automated Enhanced Conditions	Analysis Tools		
Additional Services	External Company Setup	Closing Costs	Collateral Tracking	Current Logins		
Personal Settings	Company Details	Input Form Sets	Dynamic Data Management	All User Information		
-	TPO Settings	Settlement Service Providers	Fee Rules	Settings Reports		

3. Select SERVICES then choose Services Management.



4. Next, click Add Service.

	Services Management	15 Services Configured	A	utomation Rules Add Service	
				Sort ~ Z-A Category ~ All	
Services Management	Xactus - Undisclosed Debt VerificationX	Xactus - Tax TranscriptX Verifications	Xactus - Social Security VerificationX	Xactus - Income VerificationX Verifications	
Data Permissions	Additional Services		Verifications		
	Service Setups Credentials	Service Setups Credentials	Service Setups Credentials	Service Setups Credentials	
	Field Mapping Doc Mapping	Field Mapping Doc Mapping	Field Mapping Doc Mapping	Field Mapping Doc Mapping	
WORKFLOW	Xactus - Fraud ReportX Fraud/Audit Services	Xactus Credit			
₽ PROCESS A····					
	Service Setups Credentials Field Mapping Doc Mapping	Service Setups Credentials Field Mapping Doc Mapping			

5. Under Category, select Flood.

E	Services Management /		
COMPANY/···	Add Service 25 Available Services	Q	
SERVICES		Sort ~ Z-A Category ~ Flood	\leftarrow

6. Click the magnifying glass and search for Xactus.

E(Services Management /	
COMPANY/···	Add Service 25 Available Services	$ \longrightarrow$
SERVICES	Sort V Z-A Category V Flood	
Ē(Services Management /	•
ଣ୍ଟି c	Add Service 5 Available Services Xactus ×	
SE··· ▲	Sort ~ A-Z Category ~ All	

7. Then, select Manual next to the service needed.

≣(Services Management /
Сомра	Add Service 29 Available Services
SERVI	Sort V Z-A Category V Flood
Services Management	Xactus - Flood ReportX Flood
Data Permissions	
Q SYSTE	Manual Easy order Automated

8. First, toggle ON next to Active. Then, enter the Service Setup Name. Typically, the Service Setup Name reflects the Provider name.

Ē	Services Management / Add Service /				^
б] сом…	Add Manual Setup			Active ON O	\leftarrow
SER…	Service Type Flood	Evaluation Level Loan Level	Provider Xactus - Flood ReportX		
Services Management			1		
Data Permissions	Service Setup Name * Xactus - Flood ReportX		Service Setup Description		
(\$) OPP					
Q sys	Readiness Conditions ①			Validate	
چ wo…	Condition Editor Query Builder				
⇒ PRO…					
ASS				Cancel Save	.

9. Then, under Authorized Users, select Add.

ASSE	Authorized Llears	
E cust	Authorized Osers	Add

10. Select the Users category and click the right arrow to add them to the Selected Users section. All authorized users must be added to the Selected Users section to have access to the Provider.

Once complete,	click Add.
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Add Entities			×
Category	Q	Selected Users	
Drganizations	→ →	Processor User (processor)	⊸ ⊗
은 Users	\neg \rightarrow	(a) Xactus Test (xactustest)	⊸ ⊗
ee Personas	→ →		
			2/200
		CLEAR ALL	2/200
			Cancel Add

11. When all Authorized Users are added, click Save.

Authorized Users [•]			Add Delete
D	NAME	TYPE	ACTION
processor	Processor User (processor)	8 User	Î
xactustest	Xactus Test (xactustest)	8 User	Î
Total items: 2			
			Cancel Save

PLEASE LET US KNOW IF YOU HAVE ANY QUESTIONS OR CONCERNS AND WE WILL BE HAPPY TO HELP.