

To redirect orders to your preferred folder, follow these instructions to setup Document Mapping.

1. Under the Encompass menu, select Settings.



2. Then, click the link for eFolder Setup.



3. Then, click Documents.



4. Click the icon to create a new folder.

Documents										
Create and manage the tracking information associated with loan documents and services.										
Documents (159)										
Name 🔺	Description	Туре	Source	Days to Receive	Days to Expire	eDisclos	Pre-			
1003 - URLA		Standard Form	1003	7		Yes	۸ ۱			
1008 - Transmittal Summary		Standard Form	1008 - Transmittal Summary	7		No	Þ			
1084A Cash Flow Analysis		Standard Form	1084A Cash Analysis	7		No	Ν			
1084B Partnership and Corporations		Standard Form	1084B Partnership and Corpo	7		No	Ν			
442 Completion Certificate		Needed				No	Þ			
4506T Settlement Service		Settlement Service			60	No	ħ.			
Acknowledgement of Intent to Proceed		Standard Form	Acknowledgement of Intent to			Yes	Ν			
Acknowledgement of Receipt of Good Fa		Standard Form	Acknowledgment of Receipt o			Yes	Ν			

5. Type the preferred name of the folder to direct your flood orders to. Any other settings can be updated based on your preference including Tracking, Conversion Format, etc. Then, click OK.

Document			×					
Name	Flood Certification							
Description			^					
			~					
Туре	Needed		~					
Tracking		Available						
Days to Receive		Webcenter						
Days to Expire		TPO Portal						
		EDM Lenders (Send Files	to Lender)					
Conversion Preferen	ces							
Keep copy of or	iginal format							
Conversion Format	Black & White	\sim						
Encompass Docs Ser	rvice							
Add this docume	ent to eDisclosure packages		Criteria					
Add this docume	Add this document to Encompass Closer packages Criteria							
Add this docume	Add this document to Pre-Closing packages Criteria							
Signature Type		\sim						
2 Learn more		ОК						

6. Then, click Settings Overview and select the link for Web Version Settings.

Encompass Settings	Encompass Settings Go to Recent Import Help Settings Overview Company/User Setup External Company Setup Laan Setup Laan Setup						
Encompass Settings Go to Recent	Import Help						
Settings Overview	Settings Overview						
External Company Setup	Company Setup The features and tools on the Company Settings and Personal Settings are used to define, configure, and manage Encompass.						
Investor Connect Setup Encompass - Web Version Settings						^	
eFolder Setup ⊛ Docs Setup	Web Version Settings	•					
Secondary Setup	Encompass - Desktop Version Settings						
 Contact Setup 	Configuration	Configuration Maintenance					
Loan Templates Build Environment Improve Productivity & Enhance Control							

7. Select SERVICES then choose Services Management.

	Encompass - Web Version Setting	5	_	×
	Ξ١			
\rightarrow	💭 SERVICES 🔺			
\rightarrow	Services Management			
	Data Permissions			

8. Click the three dots to open Xactus - Flood ReportX and choose Document Mapping.

٦

Services Management 3	Automation Rules Add Service Q	
Xactus - Flood ReportX Flood	Xactus - Flood DeterminationX Flood Development	Sort V Z-A Category V Flood CreditPlus_Flood Flood Development
Service Setup	: Service Setup : Condition Mapping	Service Setup
	Credentials	
	Document Mapping Field Mapping	
	Service Setup	

9. From the Document Type dropdown menu, select Flood ReportX. From the eFolder Document Folder dropdown menu, choose the name of the folder previously added. Then, click Save.

Services Management /		
Xactus - Flood ReportX Document Mapping	습 나 :	
Please Note: By default, all document types go into the Flood Certificate document folder unless otherwise specified here. Link to download Document Mapping Template.		
Document Types ● Flood ReportX × Image: Second Se		
+ ADD ANOTHER		
Car	Save	

10. The Document Mapping is now complete.

Г



11. Once a new order has been placed, from the Encompass eFolder, you will now see the name of the folder previously added. In this case it is called Flood Certification. Instant orders may take up to 20 minutes to return.

Doc	uments View Standard	d View	 J Z 												-
Doci	Document Group (All Documents) ~				rder None						/				
Doc	uments (5)			🛛 🞝 🕼 🛛	1 🗙 🎭 🗷 🔒 🗌	eCo	nsent	Request	eDisclosures	Retriev	e Document	t Manage	r File Mana	ger Se	end 🔻
Att	Fo Name 🔺		Description	f	or Borrower Pair		Туре		Access	F	or Milestone		Status	Date	
	flood					\sim		~				~	~	=	\sim
	Flood Certificate		Flood Certification		All		Settleme	nt Service	AC, CL, FN, LE	[Processing		Requested	05/29/2	4
	Flood Certification				All		Settleme	nt Service	AC, CL, FN, LE	📘	Processing		Received	05/29/2	4
~	Flood ReportX		Flood Determination		All		Settleme	nt Service	AC, CL, FN, LE	[Processing		Received	02/05/2	4

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