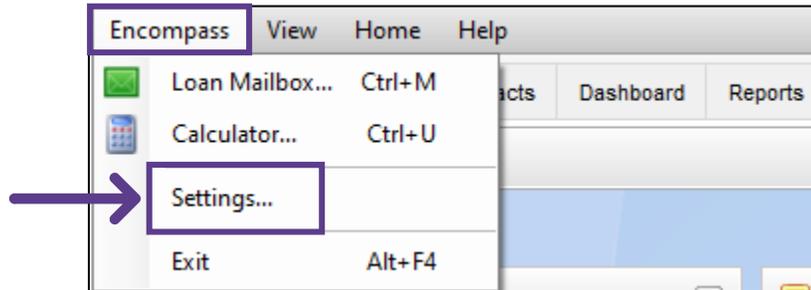
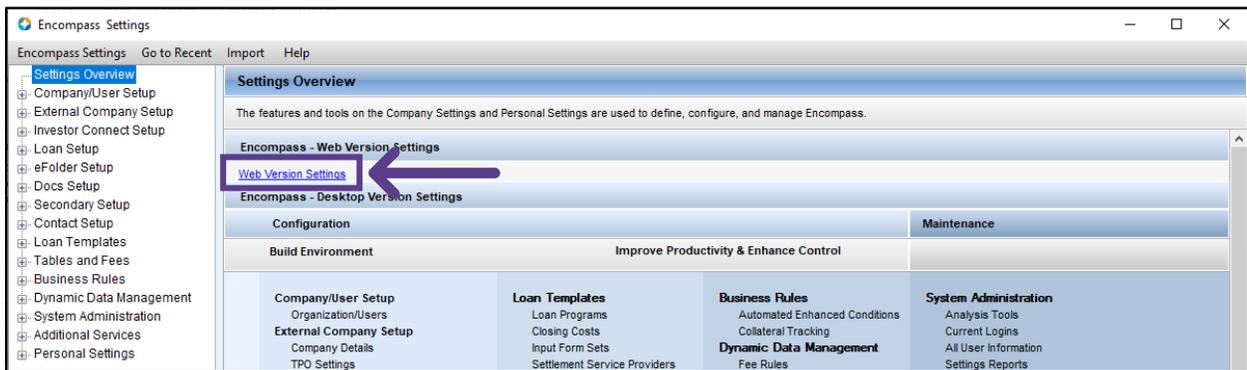


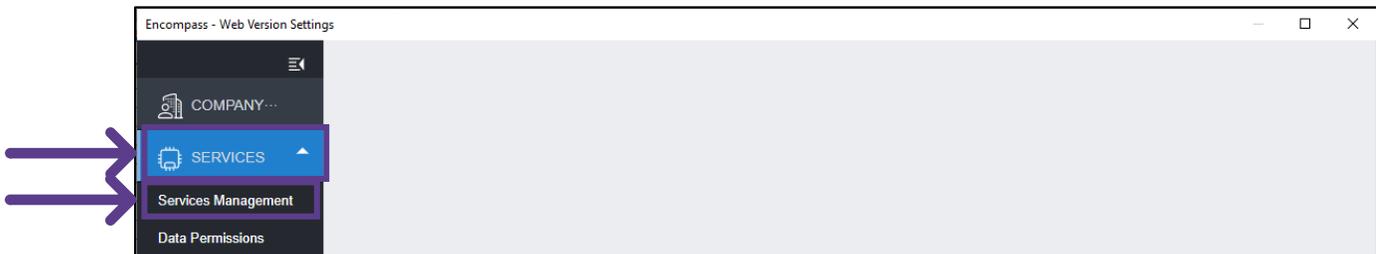
Start by logging in and under the Encompass menu, select Settings.



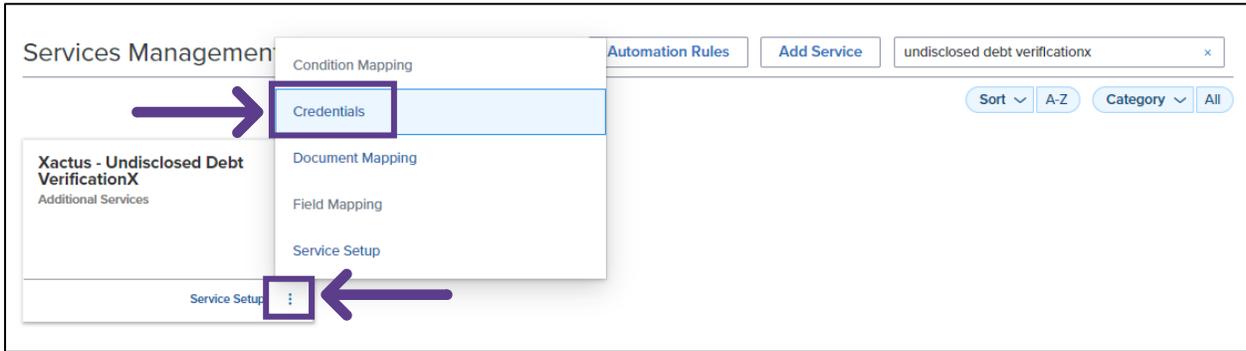
1. Then, click the link for Web Version Settings.



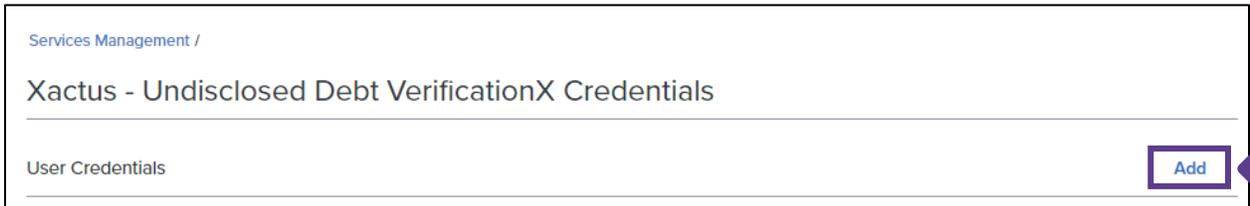
2. Select SERVICES then choose Services Management.



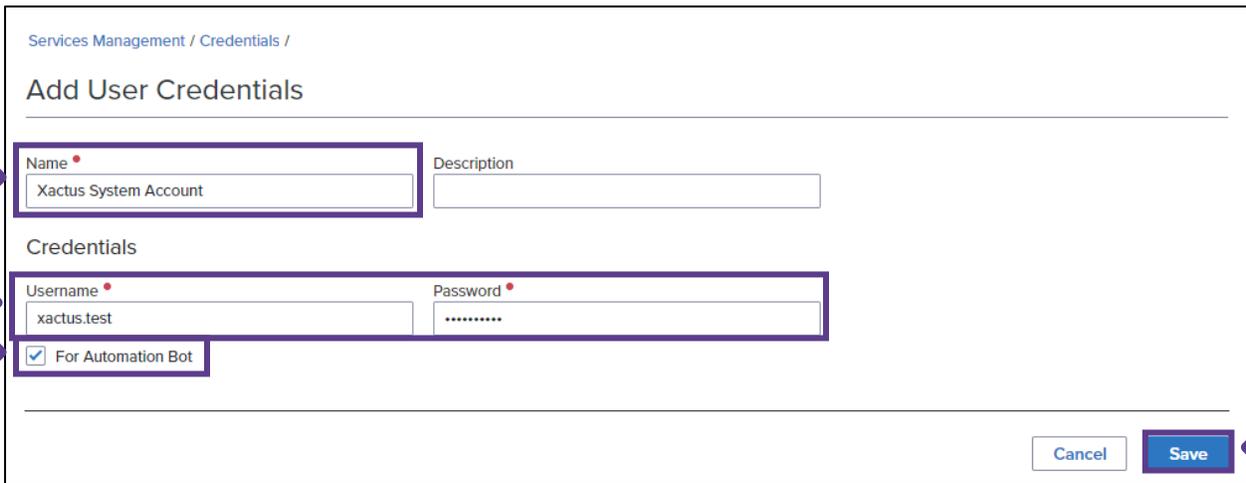
3. Click the three dots next to Service Setup, then click Credentials.



4. Then, click Add and Create a new account with valid credentials, this system account will need to go to the process in the Xactus 360 website and resetting the initial password and answering the initial password before enabling the account. (Note: a request can be made to have this system account set with a password to never expire)



5. Enter the default account Name and user credentials. Then, check For Automation. Once complete, click Save.



6. Back in the Service Setup for UDX, enter all the Authorized Users who will need to trigger the automated rules. (Note: This is an essential step, so all users who need to order this service via the ASO are enabled to place the order automatically.)

Begin by clicking Service Setup.

Services Management | 1 Services Configured

Automation Rules Add Service undisclosed debt verificationx

Sort A-Z Category All

Xactus - Undisclosed Debt VerificationX
Additional Services

Service Setup

7. Click the three dots, then click the pencil icon to edit.

Services Management /

Xactus - Undisclosed Debt VerificationX Service Setups

Credentials

Manual Add

STATUS	SERVICE SETUP NAME	READINESS CONDITION	MODIFIED BY	MODIFIED DATE	
ON	Xactus - Undisclosed Debt VerificationX		dortuno	0	 

8. Click Add to select the users needed, then when complete, click Save.

Authorized Users

Add

ID	NAME	TYPE	ACTION
<input type="checkbox"/> xactustest	Xactus Test (xactustest)	User	

Total items: 1

Cancel Save

9. Then, click Services Management.

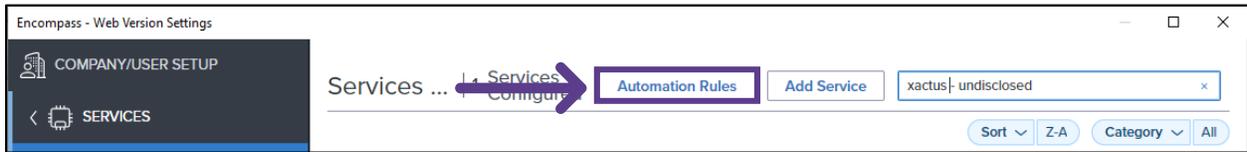
Services Management

Xactus - Undisclosed Debt VerificationX Credentials

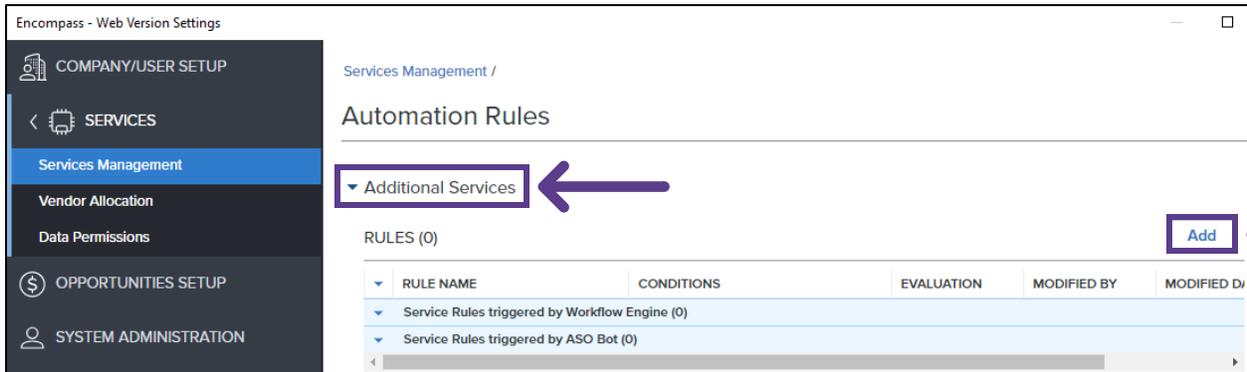
User Credentials

Add

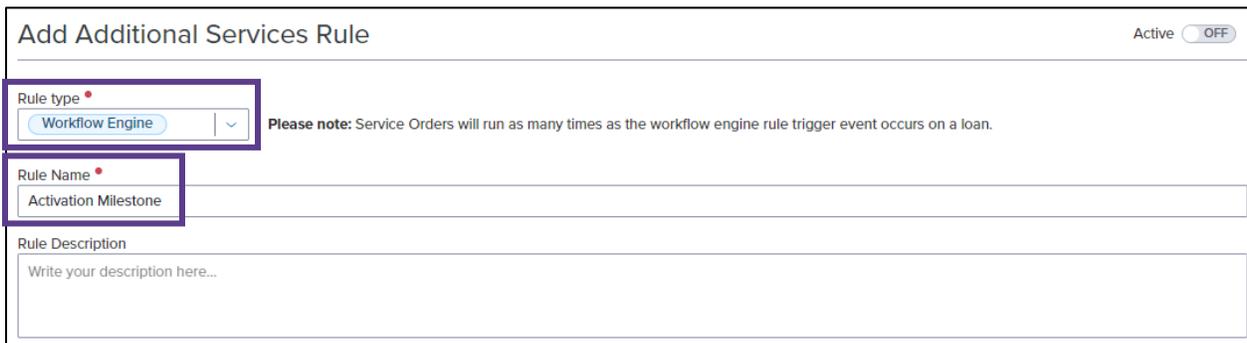
10. Next, select Automation Rules.



11. Select Additional Services, then click Add.



12. Then, under Rule type select Workflow Engine and add a Rule Name. In this case, it was named Activation Milestone.



13. Next, scroll to Service Orders and click Add.



14. Choose Xactus – Undisclosed Debt VerificationX as the Provider. Then, click Create.

Add New Automated Service Order

Provider *

Xactus - Undisclosed Debt VerificationX x

Cancel Create

15. Change Evaluation Level to Application Level. Then, enter a Service Setup Name; this can be anything you would like and in this case, it was named Milestone.

Add Service Order Active OFF

Service Type: Additional Services Order Type: Automated Evaluation Level: Application Level Provider: Xactus - Undisclosed Debt Verificati...

Service Order Name *: Milestone Service Order Description:

Automation Creation – Activation

16. Then, scroll to Automated Options and click Add.

Automated Options *

Add

17. Enter a Template Name and match it with the Request Type. Encompass Admins will need to select the 3 available users who will receive the Notification emails, then click Save.

Template Name

Request Type Activation ▼

Notification Email Sent to:

- Loan Officer
- Loan Processor
- Underwriter

Notes:

- The emails will continue to go to the system account setup in the credentials area, under ASO Automation Credentials, in addition to the Team Members selected on the file.
- If a Team Member has more than 1 user, e.g.: LO + LP or UW, the email will go only 1 time per Team Member, not multiple times.
- If a new Team Member, e.g.: LP is added down the path, and the Service has not been activated, the new added Team Member will also receive the notifications.

Sample of email notification to the Team Members:



UDx has activated successfully for FRANK LLEEXO.

Report ID: [1214295](#)

Bureau : TransUnion

Thank you ,

Xactus

18. Then, select Activation and Continue.

The screenshot shows a table titled "Automated Options" with an "Add" button in the top right. The table has columns for "OPTION NAME", "CREATED BY", "CREATED DATE", "MODIFIED BY", and "MODIFIED DATE". A single row is visible with "Activation" as the option name, "xactustest" as the creator, and "04/10/2024" as the creation date. A purple arrow points to the selection checkbox in the first column, which is checked. At the bottom right, there are "Cancel" and "Continue" buttons, with a purple arrow pointing to the "Continue" button.

	OPTION NAME	CREATED BY	CREATED DATE	MODIFIED BY	MODIFIED DATE	
<input checked="" type="checkbox"/>	Activation	xactustest	04/10/2024			⋮

19. Then, toggle to ON to activate the order and click Save.

The screenshot shows a table titled "Service Orders (1)" with an "Add" button in the top right. The table has columns for "ACTIVE", "PROVIDER", "SERVICE ORDER NAME", "MODIFIED BY", "MODIFIED DATE", and a status icon. A single row is visible with "ON" in the active column, "Xactus - Undisclosed Debt VerificationX" as the provider, and "Activation" as the service order name. A purple arrow points to the "ON" toggle. At the bottom right, there are "Cancel" and "Save" buttons, with a purple arrow pointing to the "Save" button.

ACTIVE	PROVIDER	SERVICE ORDER NAME	MODIFIED BY	MODIFIED DATE	
<input checked="" type="checkbox"/>	Xactus - Undisclosed Debt VerificationX	Activation	xactustest	04/10/2024	✓

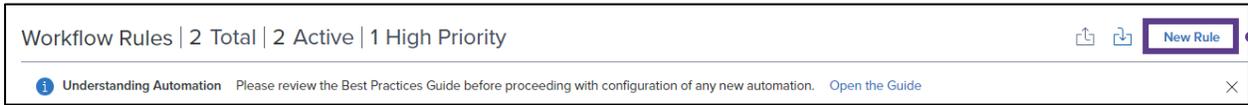
For Automation Creation – Deactivation follow steps 11-19

20. Once the rules are created, click PROCESS AUTOMATION, then select Workflow Rules.

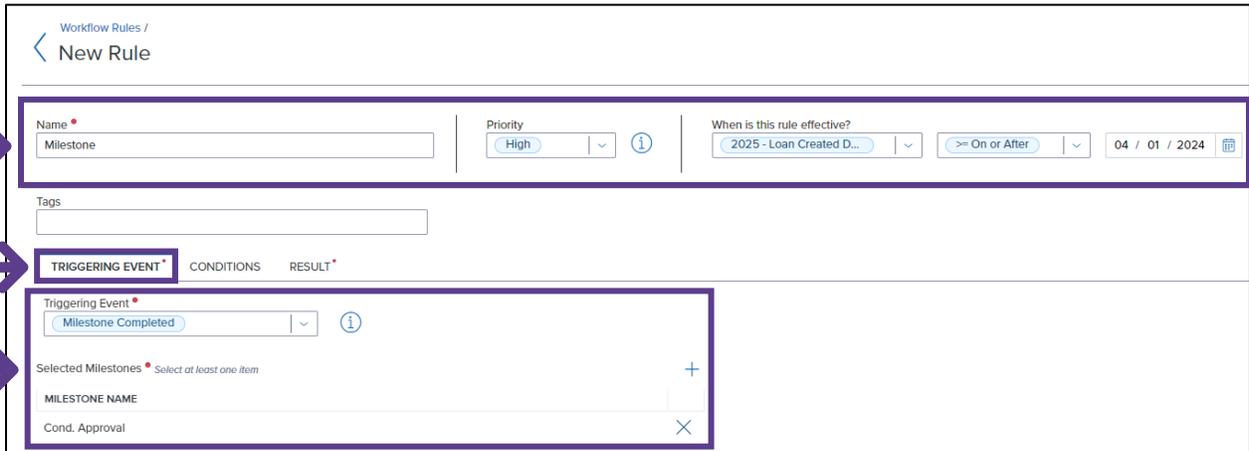
The screenshot shows a navigation menu on the left with "PROCESS AUTOMATION" and "Workflow Rules" highlighted by purple arrows. The main content area is titled "Automation Rules" and shows a table of rules. The table has columns for "RULE NAME", "CONDITIONS", "EVALUATION", "MODIFIED BY", "MODIFIED DATE", and "ACTIVE". Two rules are listed: "Deactivation Milestone" and "Milestone", both with "ON" in the active column.

RULE NAME	CONDITIONS	EVALUATION	MODIFIED BY	MODIFIED DATE	ACTIVE	
Deactivation Milestone	See referring workflow event	First Match	xactustest	06/10/2024	ON	⋮
Milestone	See referring workflow event	First Match	xactustest	06/10/2024	ON	⋮

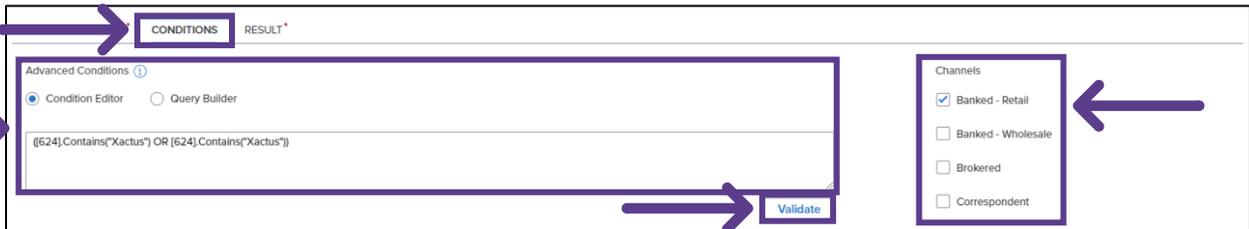
21. Then, click New Rule.



22. Provide a name for the Rule, select the Priority, and add a Sunrise Date. Ex: Rule Effective when field 2025 is on or after 4/1/2024. Then under TRIGGERING EVENT, add an Event and the Milestone at which the rule will automate.



23. Next, under CONDITIONS, select the applicable Channel(s), and add any Advanced Conditions if applicable, by clicking on the Query Builder to build the Outside Conditions. After your conditions, click on the Validate button.



24. Lastly, under RESULT, add a Resulting action, for Activation and Deactivation, Order Service will be required. Then, select the Service Rule which will apply to the settings for Activation.

TRIGGERING → RESULT*

Resulting action •
Select Add

Added Resulting Actions 1/5
Search...
Order Service

Resulting Action Configuration
Description 0/128
Hint Text

Conditions
Set additional conditions for selected Resulting Action
Advanced Conditions ⓘ

Select Service Rule •
 SERVICE RULES
 Deactivation Milestone
 Milestone

25. Once all settings are input, click Save.

Cancel Save

26. Toggle to ON to activate.

NAME	TAGS	PRIORITY	EVENT	CONDITIONS	RESULTS	ACTIVE	LAST MODIFIED BY	MODIFIED DATE
<input type="checkbox"/> Activation Milestone		High	Milestone Compl...	{624}Cor		<input checked="" type="checkbox"/> ON	0 xactustest	06/10/2024 02:08 PM

27. For the Deactivation rules, repeat the steps for 21 to 26.

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