

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



2. Go to the eFolder Setup, then click Documents and create the new folder and click OK at the bottom.



3. Then go back to Settings and click the link for Web Version Settings.

Encompass Settings					_		×	
Encompass Settings Go to Recent Import Help								
Settings Overview	Settings Overview							
Company/User Setup								
External Company Setup	The features and tools on the Company Settings and Personal Settings are used to define, configure, and manage Encompass.							
Investor Connect Setup								
🗉 Loan Setup	Encompass - Web Version Settings					<u>^</u>		
eFolder Setup	Web Version Setting							
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Contact Setup	Configuration Maintenance							
🗈 Loan Templates	Public Environment Instantia Productivity & Endpance Canada					_		
Tables and Fees	Build Environment	Improve Produ	ictivity & 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				

4. Select SERVICES then choose Services Management.

	Encompass - Web Version Setting	5		×
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	COMPANY			
$\rightarrow$	💭 SERVICES 🔶			
$\rightarrow$	Services Management			
	Data Permissions			
	WORKFLO	Welcome to Encompass Admin!		
	₽ PROCESS ····	This is just the beginning!		
	ASSET MA			
	CUSTOMI			

 Next, click Service Setup underneath the product you would like to map. Xactus products that can be mapped include Flood ReportX, Undisclosed Debt VerificationX, Tax TranscriptX, Social Security VerificationX, Employment/Income VerificationX, FraudReportX.

創 COMPANYJUSER SETUP 《 〇 SERVICES	Services Management   9 Servic	ervices Configured	Automation Rules	Add Service         Search at         Q_           (Set ~ AZ)         Category ~ AI		
Services <sup>2</sup> anagement Vender Allocation Data Permissions © OPPORTUNITIES SETUP	Xactus Credit	Xactus Credit Note: Access settings added to this product apply only to manual orders placed using Encompass MB.	Xactus - Flood DeterminationX Flood	Xactus - Flood ReportX Flood		
C WORKFLOW MANAGEMENT	Service Setup 1	Service Senap 1	Service Setup 1	Service Setup		
	Xactus - Fraud ReportX Fraud/Audit Services	Xactus - Income VerificationX Verifications	Xactus - Social Security VerificationX Verifications	Condition Mapping Credentials Decrement Mapping		
	Service Setter 1	Service Setter	a de la compañía de la	East Manager		
	Xactus - Undisclosed Debt VerificationX Additional Services			Service Event Mapping Service Event Mapping		
	Service Setup 1					

Choose Document Mapping from the drop-down menu.

6. Under Document Types select your defaulted document. Under eFolder Document Folder select the desired folder. Click Save at the bottom.

a companyjuser setup 〈 〇 services	Bervices Management // Xactus - Social Security VerificationX Document Mapping ~   0 Documents Mapped	
Senders angement Vendor Alocation Data Permissions © OPPORTUNITIES SETUP WORKFLOW MANAGEMENT CO ASSET MANAGEMENT CUSTOMIZATION	Inbound (From Provider to Encompass) Please Note: By detault, all document types go into the Verifications document folder unless otherwise specified here. Document Types  Create or select value    ADD ANOTHER	් එ 🖻
	eFolder Document Folder *       Document Types *         Create or select value       ✓         + ADD ANOTHER	එ එ ළ
B		Cancel Save

7. Repeat the process for each product you would like to map.

**Note**: For the VOE/VOI products be sure and map each verification vendor you would like to map. Credit is not included.

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