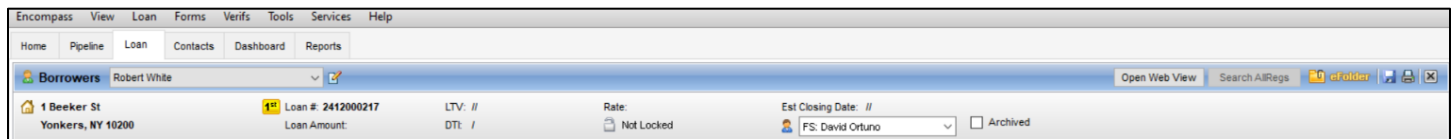
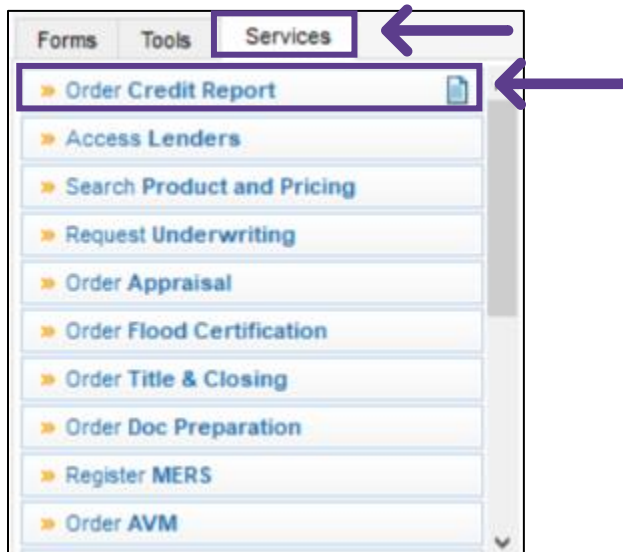


How to Configure the Admin Control Screen in Encompass

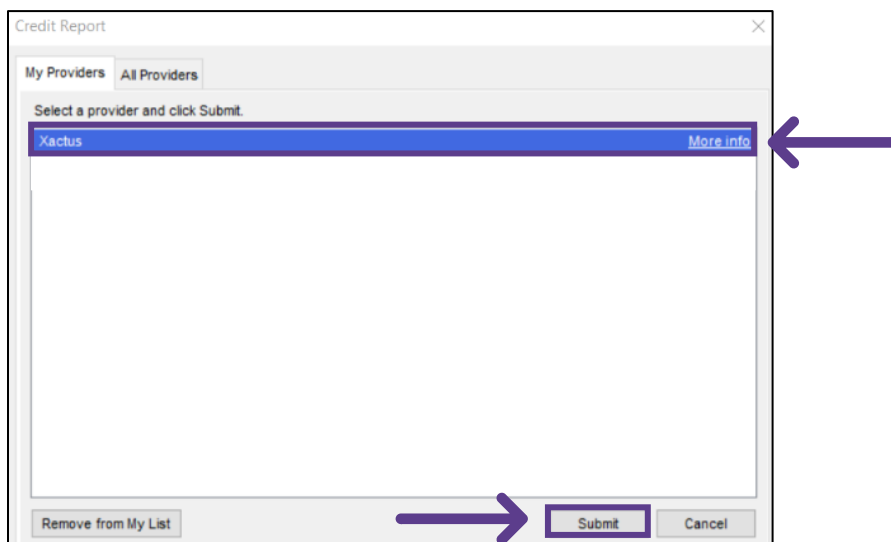
1. Start by logging into Encompass and opening a borrower's file. The new Admin screen is under Credit.



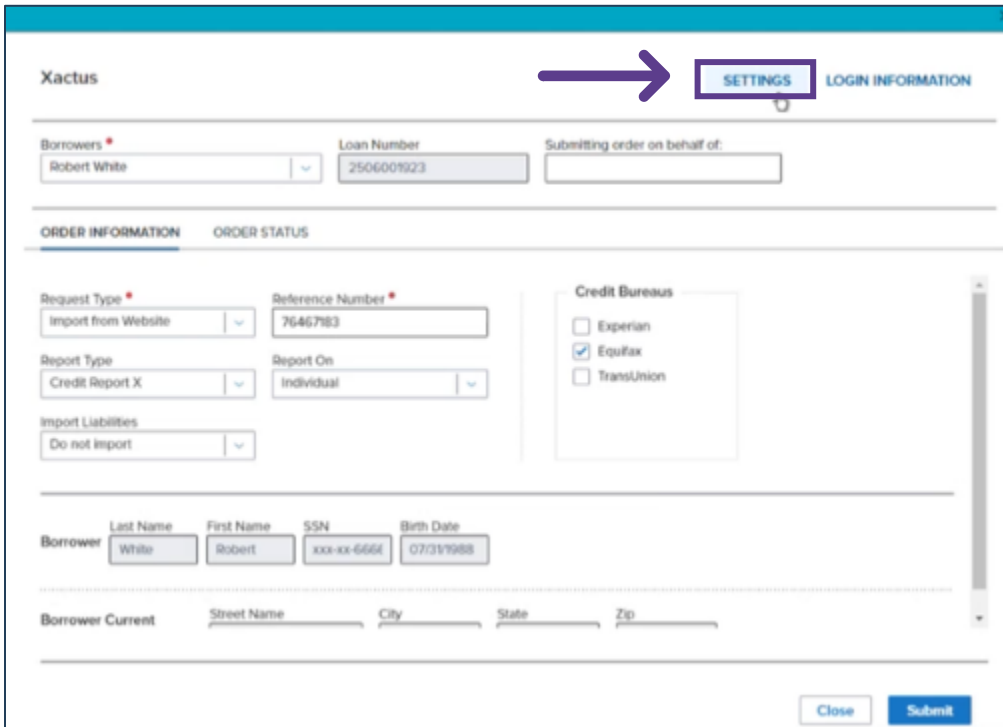
2. Click on the Services tab in the bottom left corner. Select Order Credit Report.



3. A window will pop-up allowing you to choose your provider. Select Xactus and then click Submit.

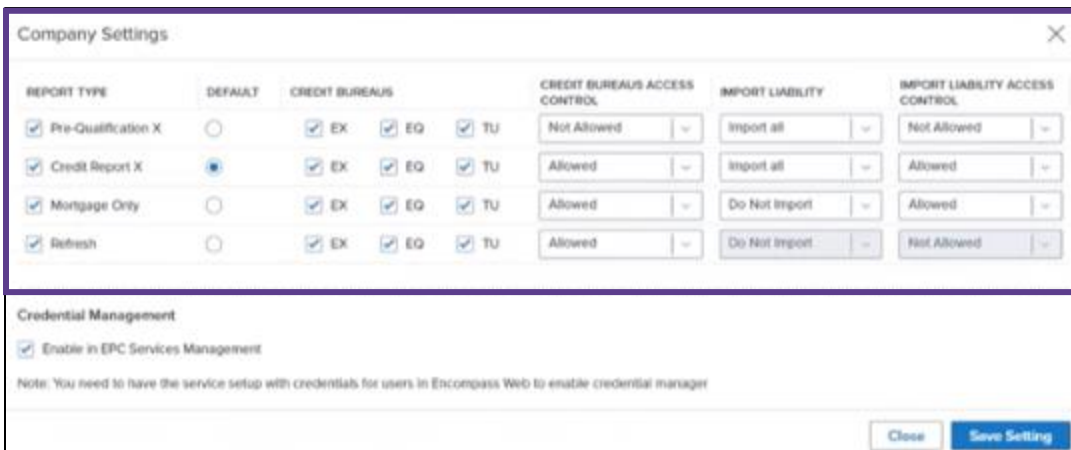


4. Once the credit screen loads, click on Setting at the top of the screen.
Note: Only an Encompass Admin will see the Settings link.



The screenshot shows the Xactus credit screen. At the top, there is a navigation bar with the Xactus logo and two links: "SETTINGS" and "LOGIN INFORMATION". A purple arrow points to the "SETTINGS" link. Below the navigation bar, there are input fields for "Borrowers" (Robert White), "Loan Number" (250600923), and "Submitting order on behalf of:". Below these fields, there are tabs for "ORDER INFORMATION" and "ORDER STATUS". Under "ORDER INFORMATION", there are fields for "Request Type" (Import from Website), "Reference Number" (76467183), "Report Type" (Credit Report X), "Report On" (Individual), "Import Liabilities" (Do not import), and "Credit Bureaus" (Experian, Equifax, TransUnion). Below these fields, there are input fields for "Borrower" (Last Name: White, First Name: Robert, SSN: xxx-xx-6666, Birth Date: 07/31/1988). Below the borrower fields, there are input fields for "Borrower Current" (Street Name, City, State, Zip). At the bottom right, there are "Close" and "Submit" buttons.

5. The Company Settings will appear and will default to your existing settings.



The screenshot shows the "Company Settings" dialog box. It has a close button (X) in the top right corner. The dialog box contains a table with columns: "REPORT TYPE", "DEFAULT", "CREDIT BUREAUS", "CREDIT BUREAUS ACCESS CONTROL", "IMPORT LIABILITY", and "IMPORT LIABILITY ACCESS CONTROL". The table has four rows: "Pre-Qualification X", "Credit Report X", "Mortgage Only", and "Refresh". The "Credit Report X" row is selected. Below the table, there is a section for "Credential Management" with a checkbox "Enable in EPC Services Management" and a note: "Note: You need to have the service setup with credentials for users in Encompass Web to enable credential manager". At the bottom right, there are "Close" and "Save Setting" buttons.

REPORT TYPE	DEFAULT	CREDIT BUREAUS	CREDIT BUREAUS ACCESS CONTROL	IMPORT LIABILITY	IMPORT LIABILITY ACCESS CONTROL
☒ Pre-Qualification X	☐	☒ EX ☒ EQ ☒ TU	Not Allowed	Import all	Not Allowed
☒ Credit Report X	☒	☒ EX ☒ EQ ☒ TU	Allowed	Import all	Allowed
☒ Mortgage Only	☐	☒ EX ☒ EQ ☒ TU	Allowed	Do Not Import	Allowed
☒ Refresh	☐	☒ EX ☒ EQ ☒ TU	Allowed	Do Not Import	Not Allowed

6. Choose your changes for any or all Report Types. Once all changes are complete, click Save Setting.

Company Settings

REPORT TYPE	DEFAULT	CREDIT BUREAUS	CREDIT BUREAUS ACCESS CONTROL	IMPORT LIABILITY	IMPORT LIABILITY ACCESS CONTROL
☒ Pre-Qualification X	☐	☒ EX ☒ EQ ☒ TU	Not Allowed	Import all	Not Allowed
☒ Credit Report X	☒	☒ EX ☒ EQ ☒ TU	Allowed	Import all	Allowed
☒ Mortgage Only	☐	☒ EX ☒ EQ ☒ TU	Not Allowed	Do Not Import	Allowed
☒ Refresh	☐	☒ EX ☒ EQ ☒ TU	Allowed	Do Not Import	Not Allowed

Credential Management

☒ Enable in EPC Services Management

Note: You need to have the service setup with credentials for users in Encompass Web to enable credential manager

Close

Save Setting



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