Encompass® User Guide - Lender (FNF)

May 29, 2025

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History

Date	Details	Revised by
05/29/2025	Rewrite to accommodate Web Portal version.	
06/17/2025	Updated logo and added ICE Mortgage Technology®	Susan Rivera-Stoll
06/27/2025	Removed language pertaining to Select users to provide a Lender/Encompass user guide	Susan Rivera-Stoll

Introduction

With its Encompass suite of products, ICE Mortgage Technology® is a leading provider of loan origination software solutions for the residential mortgage industry. With Encompass, lenders can now send title, escrow and closing service orders directly to SoftPro service providers, without leaving the Encompass loan file.

This User Guide provides information on how the Encompass integration works and how orders sent from an Encompass user are managed in SoftPro 360.

Placing a New Order

Opening the Integration

Required Data

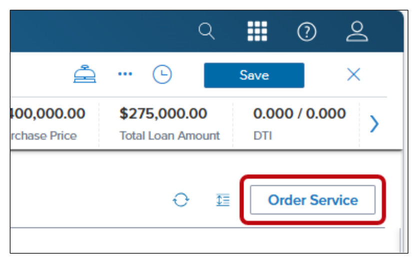
To submit a Title and Closing Request, the Encompass file must contain the Borrower First and Last Name and the subject Property Address, City, State and Zip code.

Order Service

From the Encompass loan file, select **Services** from the menu (on the left) to open the **All Services** screen. The screen displays **Categories** where services have already been ordered. Clicking the Category expands to show existing requests along with the information pertaining to its submission: who ordered, when it was ordered, the number of documents submitted and the status of the submission.

From here the user can order a new service or re-order a previously submitted service request.

Click the **Order Service** button (upper right) to open the **Order Service** window



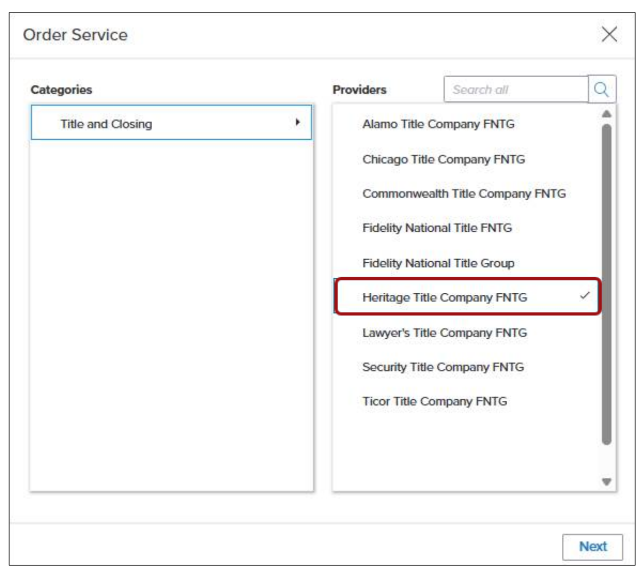
<u>Selecting the Provider</u>

From the **Order Service** window, the user selects the Title and Closing Provider.

Select **Title and Closing** from the **Categories** field to populate the available **Providers** list.

Select the applicable **Provide**r and click the **Next** button.

NOTE: Select **Fidelity National Title Group** for any brand not listed.

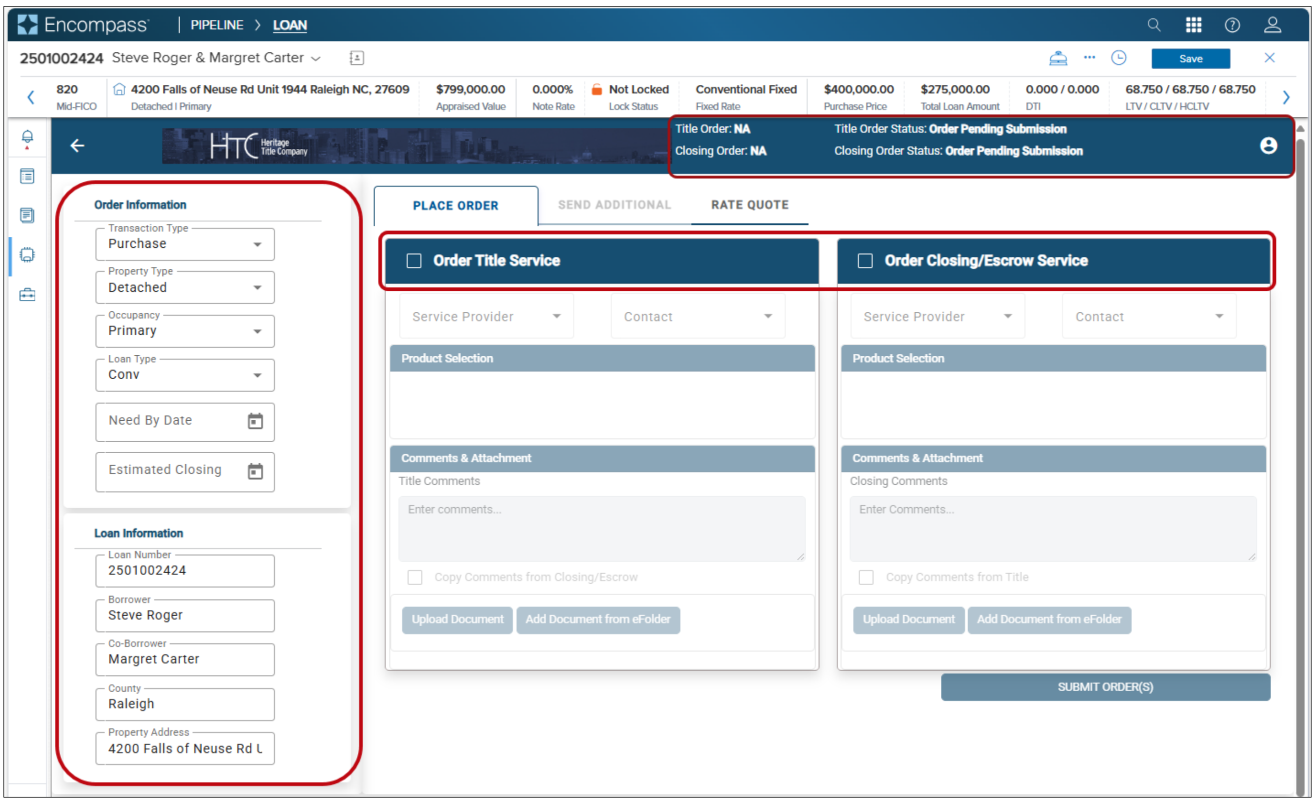


Order Information and Loan Information Sections

The Order screen displays information pulled in from the Encompass loan file, provides the ability to place the order and send additional documents, notes, etc. The toolbar displays the **Order Number** (once assigned by the Provider) and updates the **Order Status** as it progresses through the process. Users can click the **Profile** icon to obtain **Help and support** or return **Back To Service**.

The FNTG Order screen populates the **Transaction Type** (an entry here is required to submit), **Property Type**, **Occupancy**, **Loan Type**, and **Estimated Closing.** Changes to the data in these fields can only be made in the Encompass loan file with the exception of the **Estimated Closing** field. However, changes entered in this field do not save back to the Encompass loan file. The **Need By Date** may be entered if desired.

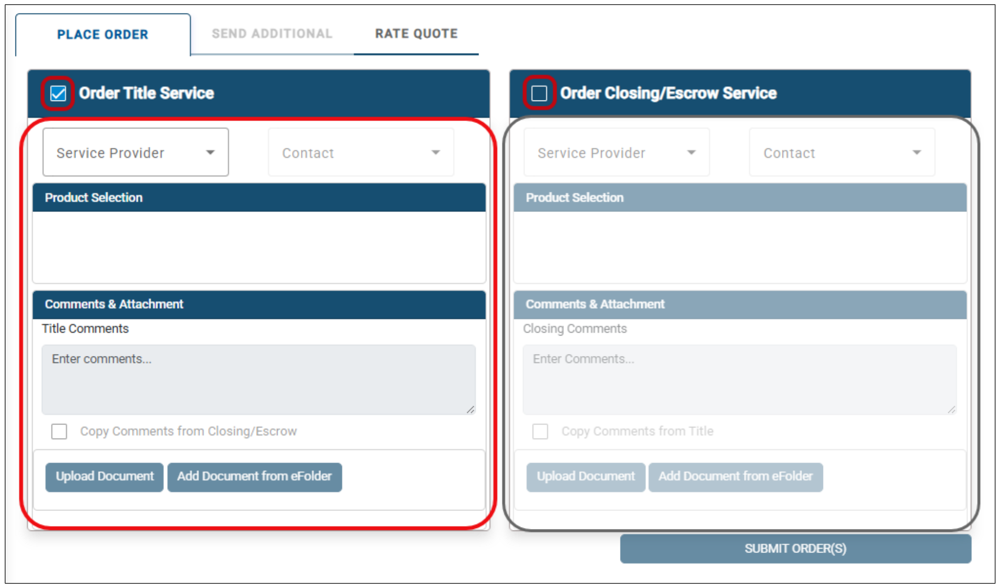
The **Place Order** tab is streamlined to the services available: **Order Title Service** and **Order Closing/Escrow Service**. The fields within each product do not enable until the service is selected.



The Place Order Tab

As noted above, the Encompass user has the ability to request **Title Services** only and/or **Closing/Escrow Services** by checking the check box for the applicable option.

When a Service check box is checked, the fields are then enabled. All required fields (as noted by a red asterisk) must be completed to enable the **Submit Order(s)** button.



Service Provider/Contact

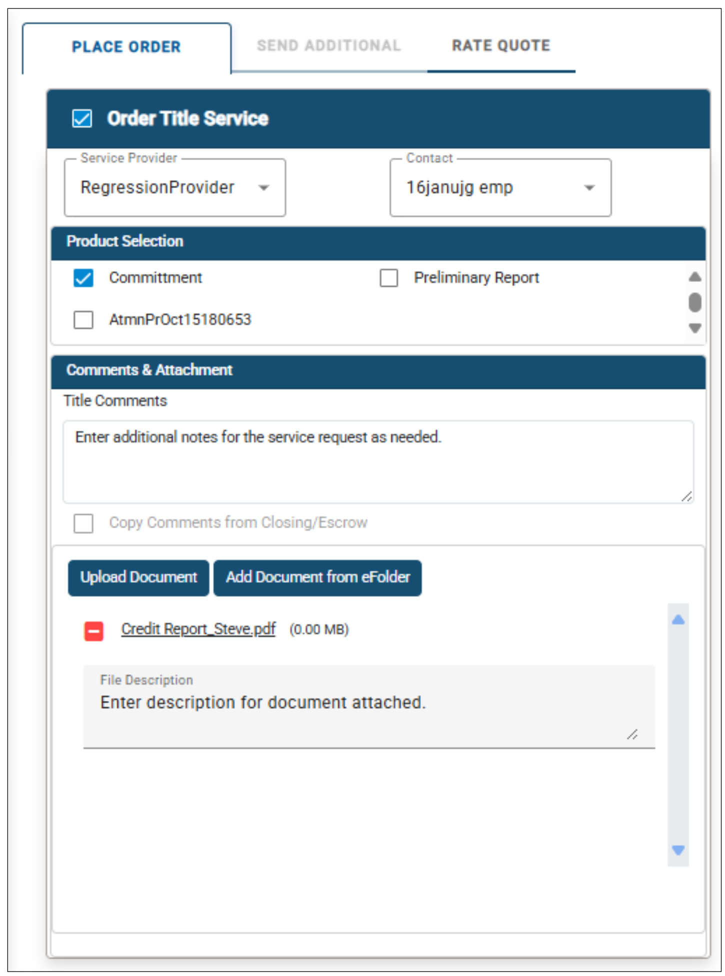
From the respective drop-down, select an office for the Provider selected and the Contact. The **Service Provider** and **Contact** are required fields, and the remaining fields are not enabled until a selection is made.

Selecting a Product

Check the corresponding check box for the product desired (i.e., Property Report, Preliminary, Commitment, O&E Report, etc.). A selection is required to proceed.

Comments & Attachments

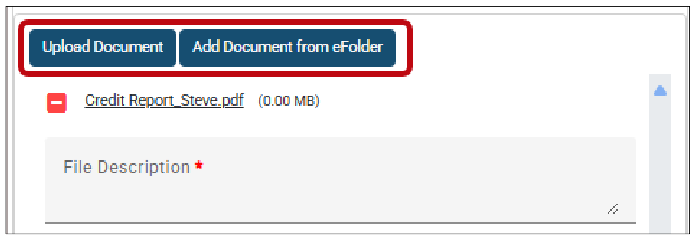
Additional information may be sent with the service request such as additional notes and documents.



Enter comments in the **Comments** field (up to a maximum of 1000 characters). If Title Services and Escrow/Closing Services are ordered, comments entered for one service may also be added to the other service by checking the **Copy Comments from** [**Closing/Escrow** or **Title**] check box. The check box is enabled for the service where Comments have not yet been entered.

NOTE: Checking the **Copy Comments** check box overwrites any notes that may have been entered in the Comments field notes are being copied to (in the example below, the Title Comments would be overwritten if manually entered.

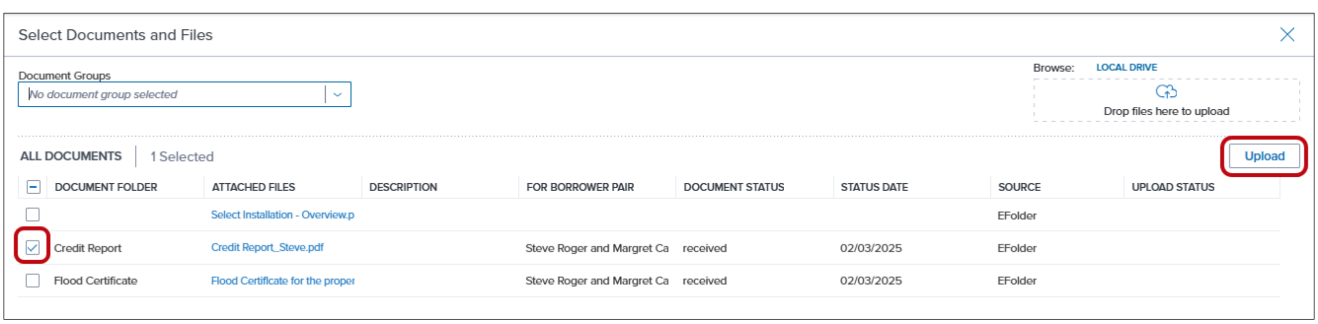
Document(s) can be added from the user's hard drive or the eFolder for the Encompass loan with a maximum upload limit of 90mb for both local documents and eFolder documents. If a document is to be sent with the Title Service request and/or the Closing/Escrow Service, it must be uploaded for both services and a description of the document entered in the **Description** field.



- **Upload Document** to add a document to the **Documents** folder for the loan; this opens File Explorer to select a document for upload.
- **Add Document from eFolder** to select from documents already uploaded for this loan. When this option is selected, the **Select Documents and Files** screen displays all documents by default. Users can select a document from the **All Documents** list shown on-screen or narrow the list of documents by selecting a specific folder from the **Document Group** drop-down. New documents may also be uploaded from this screen using the **Browse** link or drag-and-drop files in the **Drop files here to upload** box.

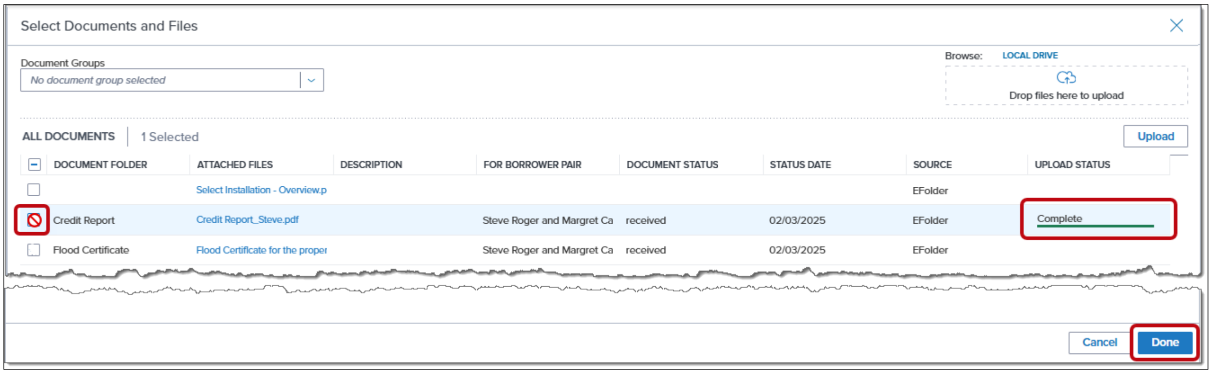
Selecting Documents to Transmit

Check the corresponding check box for the document(s) to be sent with the service request. Click the **Upload** button to attach the document to the request

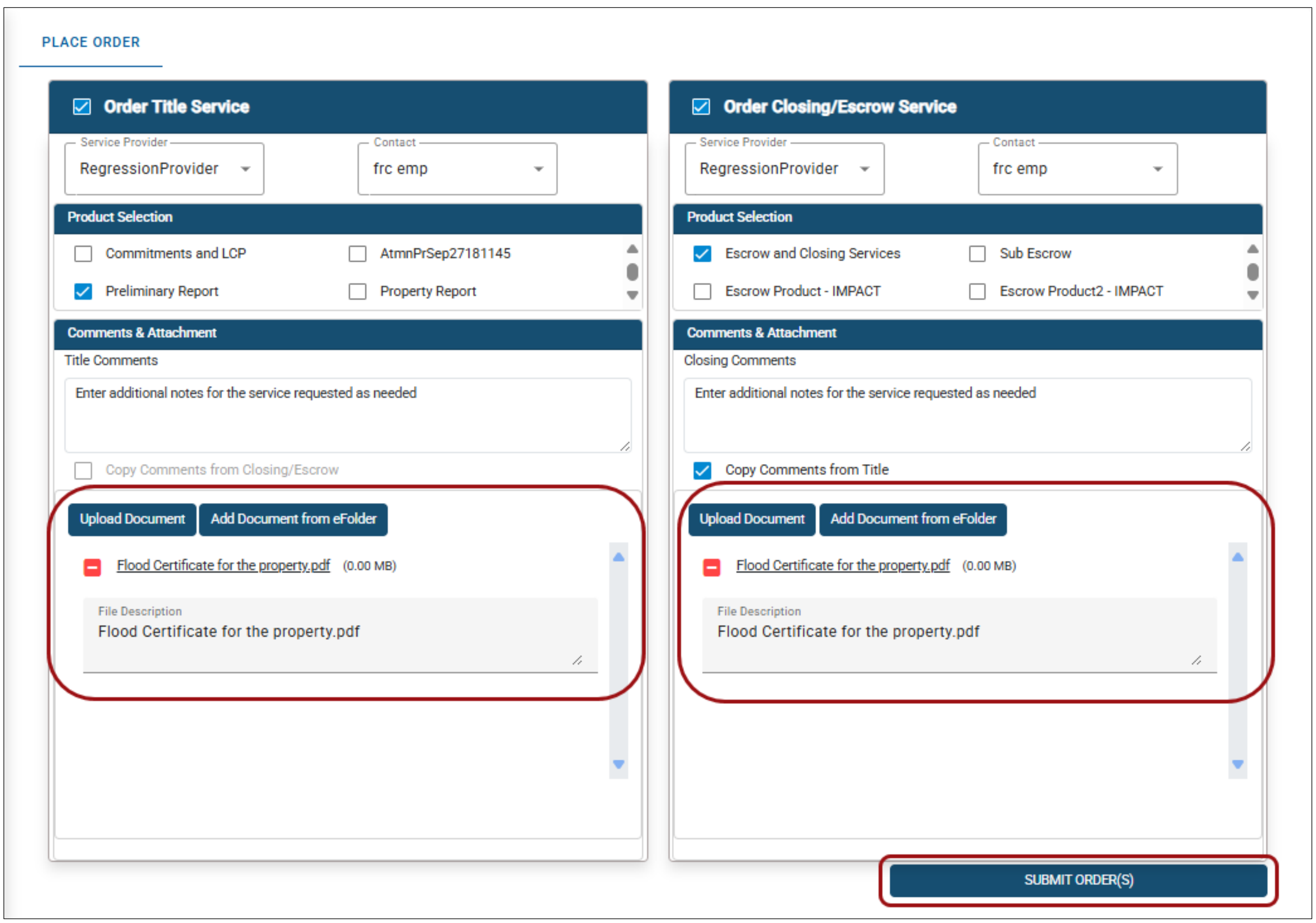


The **Upload Status** shows as **Complete,** and the document is no longer available for upload for this request instance.

Click the **Done** button to return the **Service Request** window.

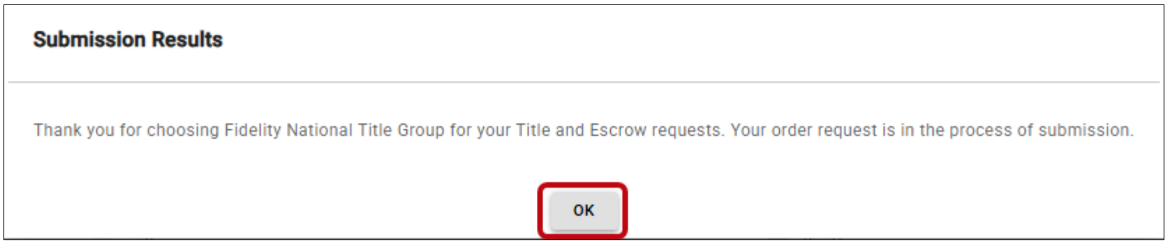


The document selected is now shown in the **Documents & Attachments** section of the specific Service. If a document is to be sent with the Title Service request and/or the Closing/Escrow Service, it must be uploaded for both services and a description of the document entered in the **Description** field.

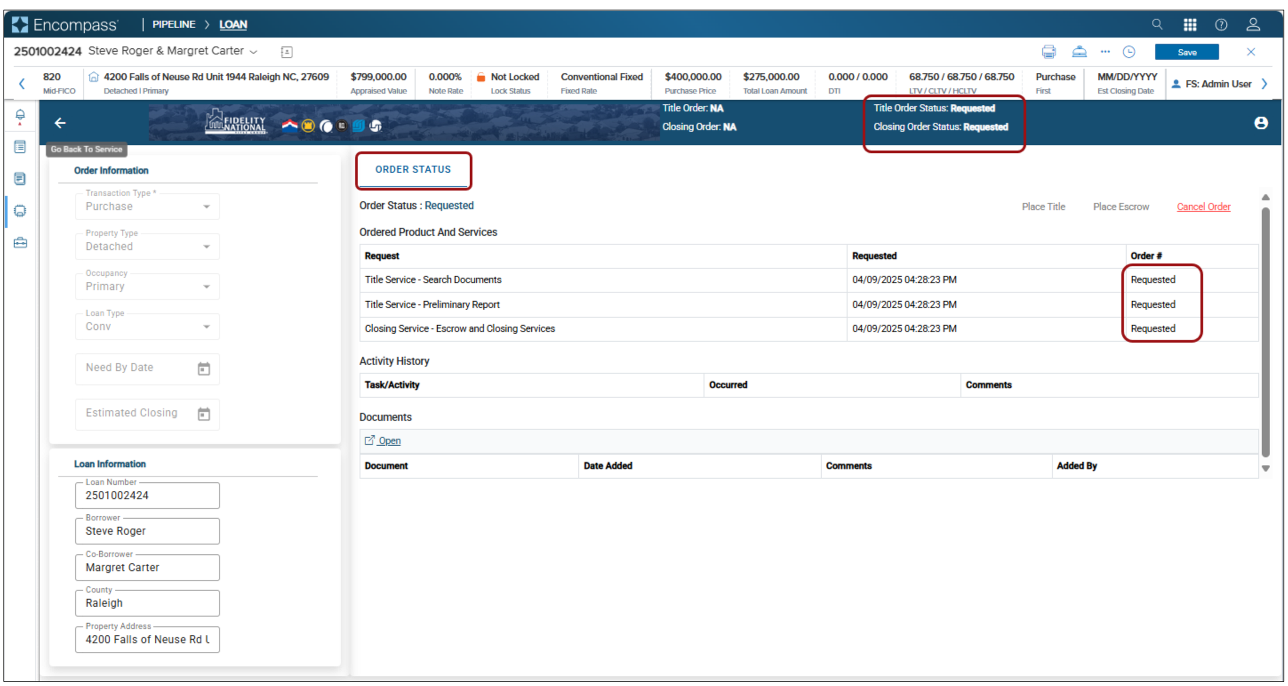


Submitting the Order Request

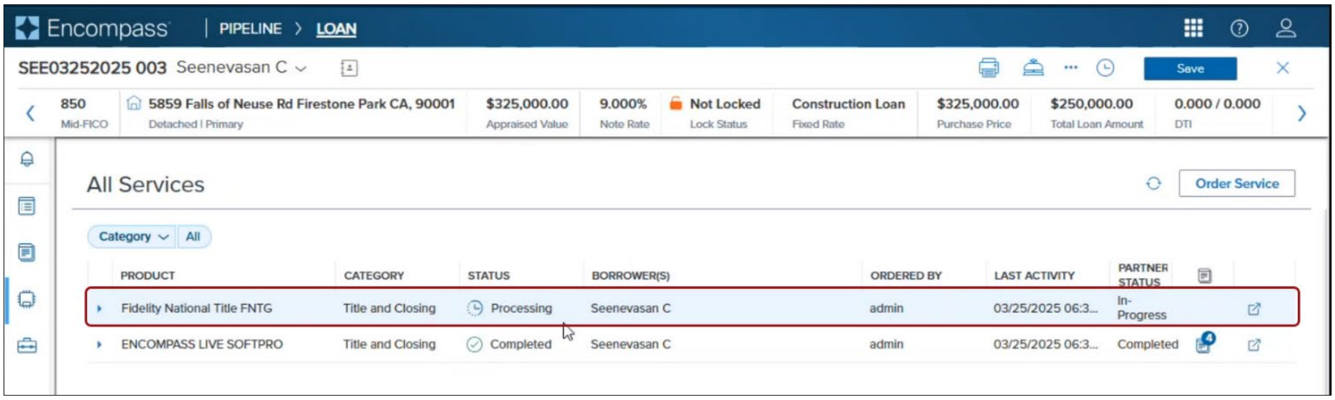
Click the **Submit Order(s)** buttons to send the order request to the **Provider** and a **Submission Results** dialogue box appears citing the service provider and the service request type displays as **Title and Escrow Requests**.



Clicking **OK** opens the **Order Status** tab displaying the product(s) requested, and the date and time of the request. When documents are received from the Provider, they appear in the **Documents** section. Until the order request has been accepted by the Provider, the **Order Number** on the **Check Status** tab displays as **Requested** and the **Order Status** field at the top of the **Order** screen displays **Requested** with **Order Number** displaying **NA** for each service requested. Once the order has been accepted by the Provider, the **Status** field is updated to show **Accepted,** and the **Order Number** populates the ProFrom order number.

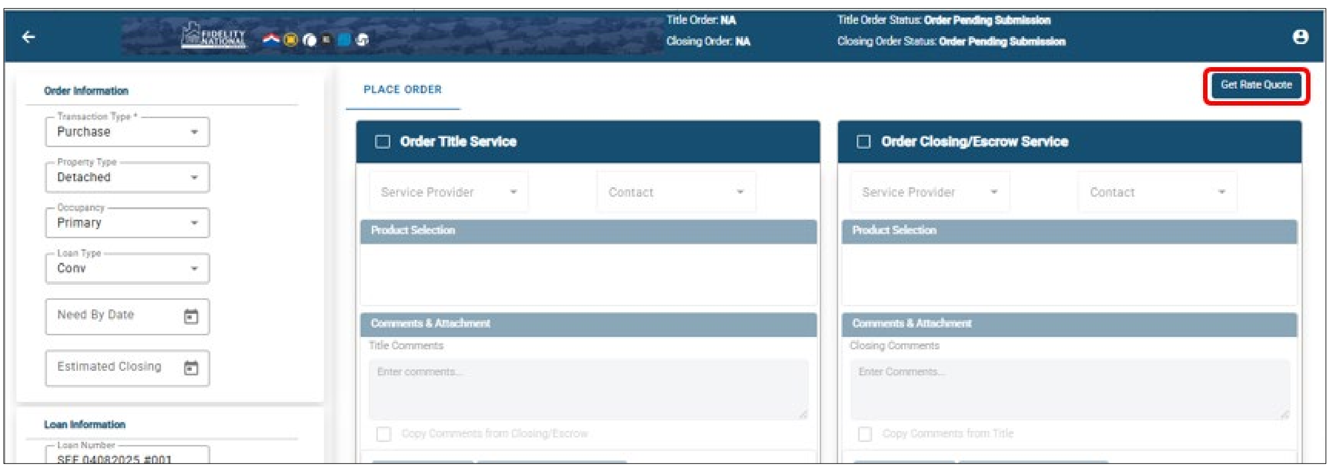


Closing the **Fidelity** order screen returns the user to the Encompass loan file displaying the **All Services** screen. The **All Services** screen displays the submitted service request citing the **Status** as **Submitted**, who placed the service request, and date the request was made. The **Partner status** shows as **InProgress**.



Requesting FNTG Rate Quote

An Encompass user can request a rate quote using the **Rate Quote** button in the upper right corner.



The link directs the user to the FNTG Rate Calculator (FRC) page where the user logs in using their Encompass credentials.

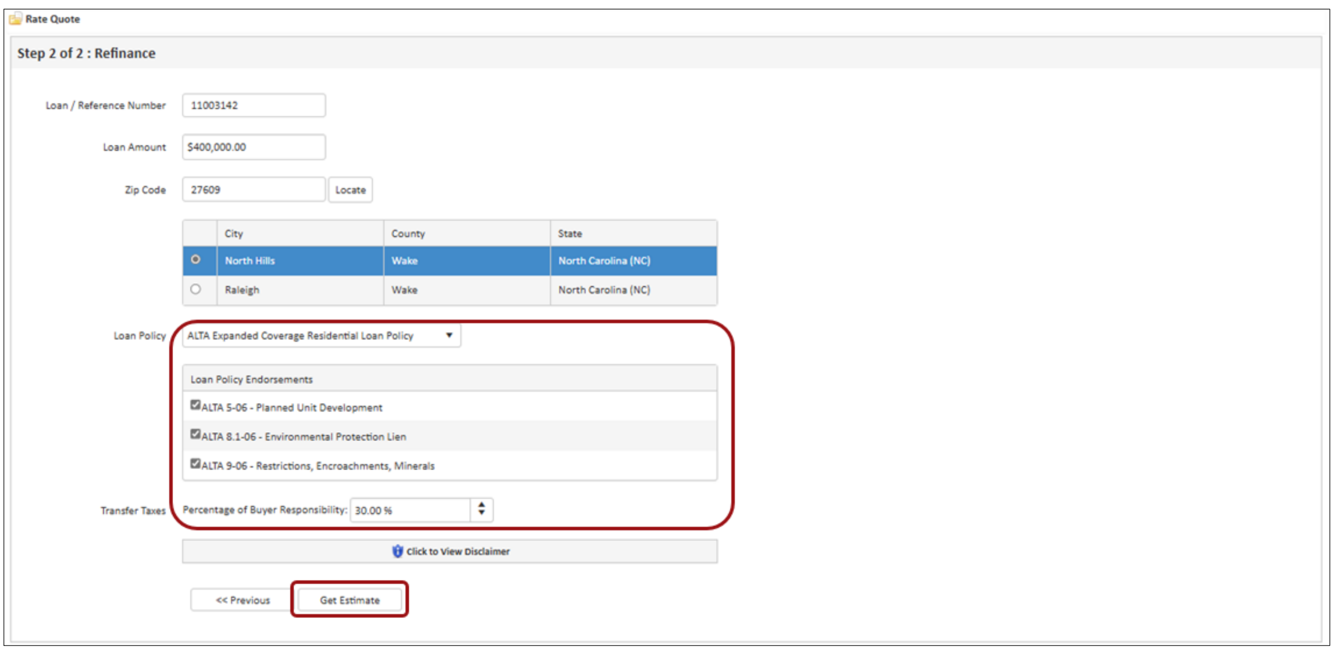
NOTE: If the password is not recognized, click the **Forgot password** link to generate a new password. Generating a new password here does **NOT** change the password for Encompass. The new password only applies when logging into the FRC site.

Once logged in, the **Rate Quote Step 1** screen which populates the **Brand** and **Transaction type** if entered in the Encompass loan file and the **Provider** and **Product** selections are manually made.

Click the **Next** button to continue to the Step 2 screen.

This screen populates the **Loan Number**, **Loan Amount** and **Zip code** entered in the Encompass loan order. Select the,

- **Loan Policy**
- **Endorsements**
- **Transfer Taxes** – Percentage of buyer Responsibility populates once the Zip Code is selected.



Once the selections are made, click the **Get Estimate** button to generate the FRC estimate. Users can then manually enter the fees in the Encompass loan file.

Order Updates in Encompass

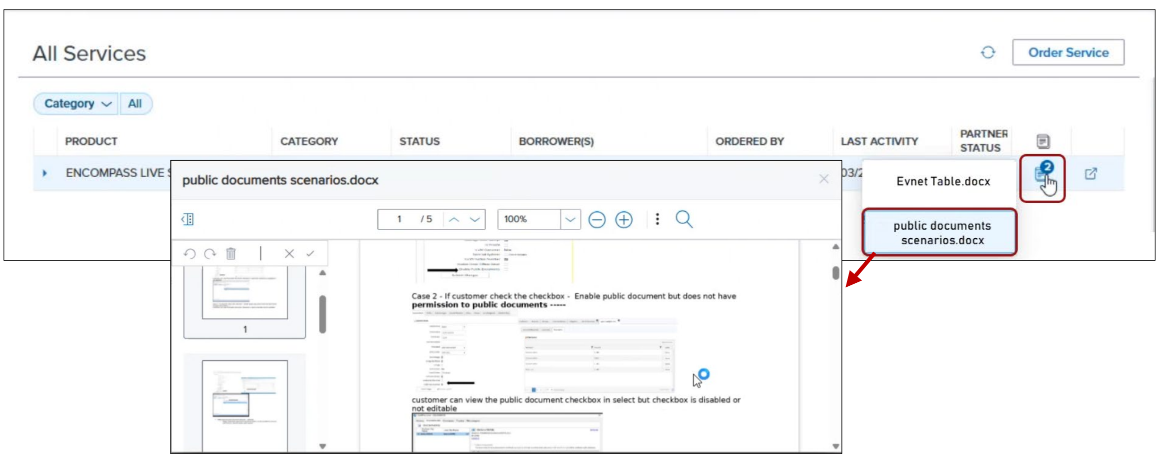
Receiving Updates

The **Order Status** tab displays the product(s) requested, the date and time of the request. Until the order request has been accepted by the Provider, the **Order Number** on the **Order Status** tab displays as **Requested** and the **Order Status** field at the top of the **Order** screen displays **Requested** with **Order Number** displaying **NA** for each service requested.

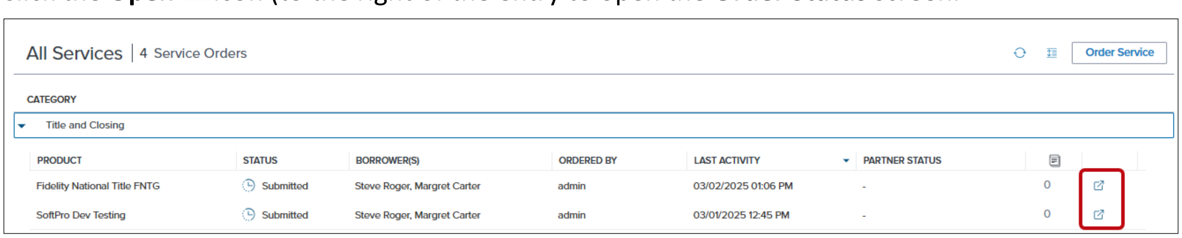
The **All Services** screen displays previously submitted service requests citing the status, the borrower(s) name, who placed the request, date of the last activity on the request, Partner status and the number of documents received from the Provider.

From here, the user can,

- Click the **Documents Received** icon to view the list of documents received. A document can be viewed on screen by clicking the document.

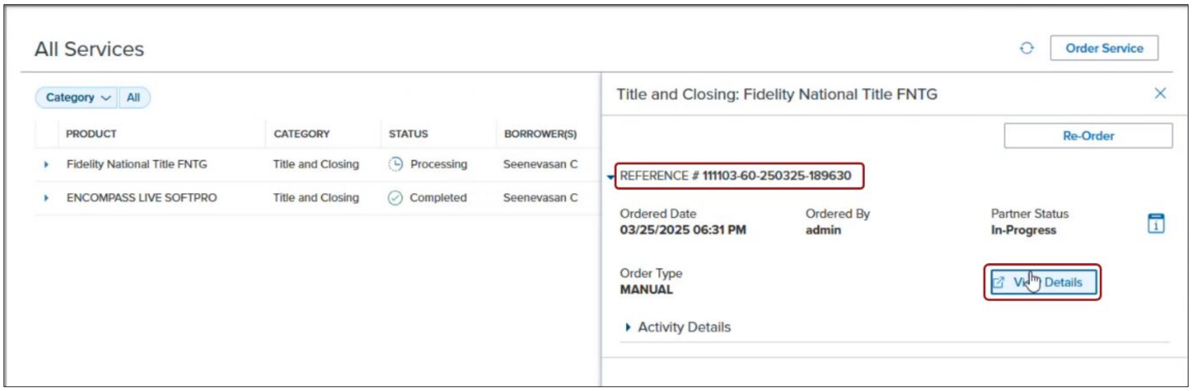


- Click the **Open** icon (to the right of the entry to open the **Order Status** screen.



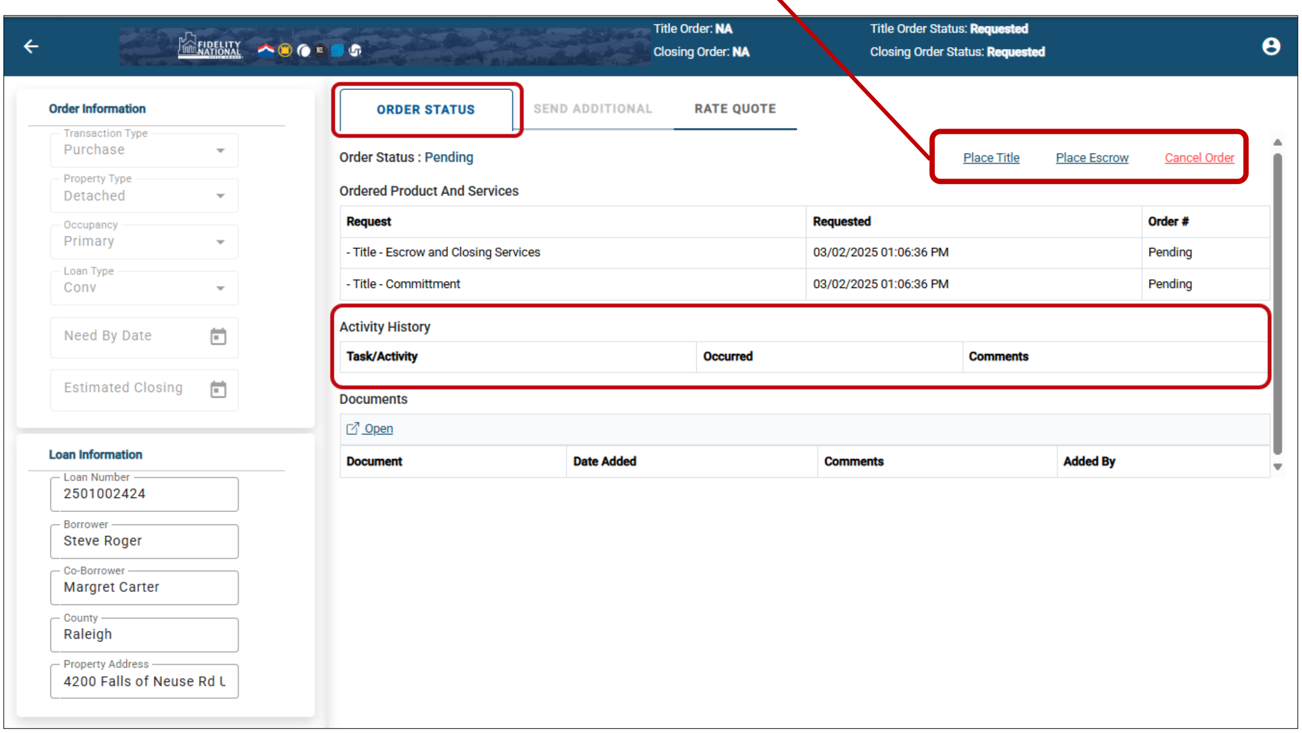
Once the order is submitted, the **Order Status** is updated to show as **InProgress**, and the **Order #** is updated to show the SoftPro Order number.

- Click anywhere on the request entry line to open the **Title and Closing** panel (to the right) for the request. The panel displays the history of the **Activity Detail** in addition to the above information displayed on the **All Services** screen along with the **360 Reference** number.
  To open the **Order Status** screen for an entry, click the **View Details** link.



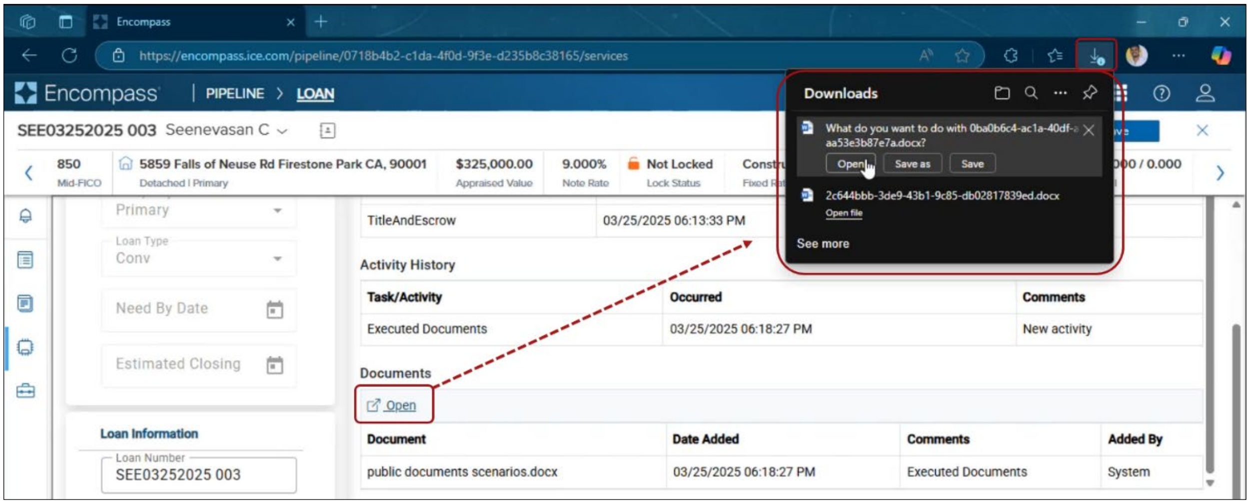
Reviewing SoftPro User Communications and Documents

The **Order Status** screen displays the **Activity History** for the selected request with any communication received from the SoftPro User populated in the **Comments** field. From here, users can also order Title, Escrow or Cancel an order by clicking the respective link. If the original order was Title Service only, the **Place Escrow** link is enabled or if the original order was Escrow or Escrow/Closing Services, the **Place Title** link is enabled.



Viewing Received Documents

Document(s) can be viewed from the **Order Status** screen as well. Highlight the corresponding document and click the **Open** link. The document is then downloaded to your default local default download folder, and you are prompted on how to proceed, (open, save as, etc.).



In the **Documents** folder, the uploaded document(s) is displayed with a status of **Received.** The Encompass user can access the documents in the loan file's **eFolder.**

Sending Documents and Comments to SoftPro/FNTG Agent

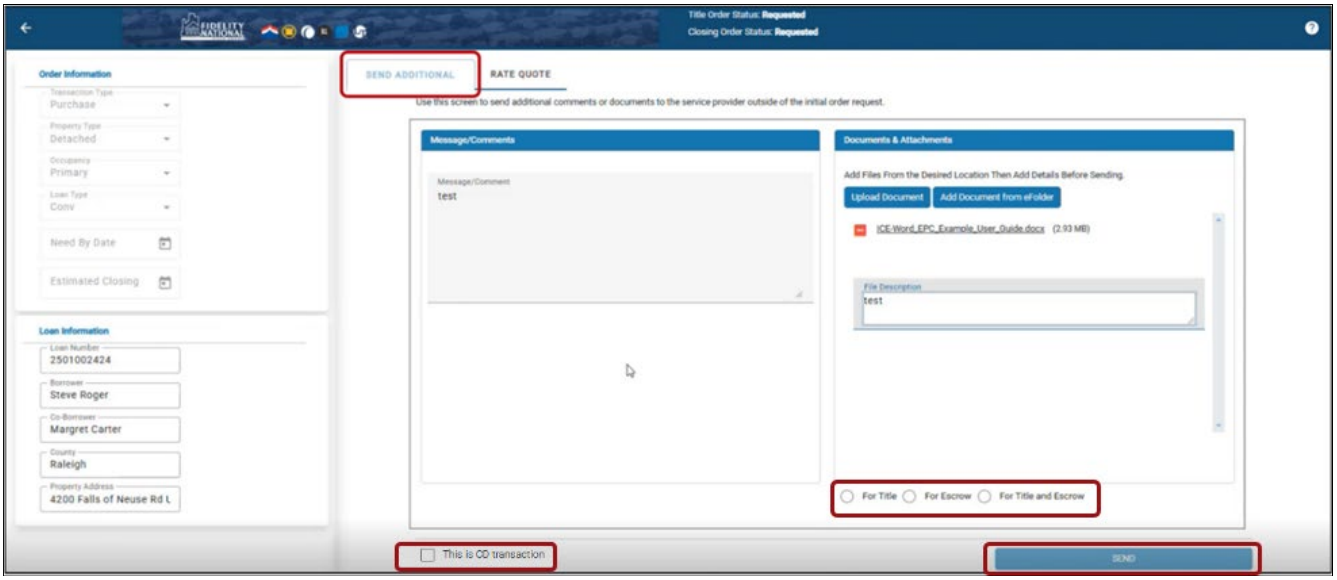
An Encompass user can send comments and documents using the **Send Additional** tab.

NOTE: The **Send Additional** tab is disabled if the order **Status** shows as **Completed**.

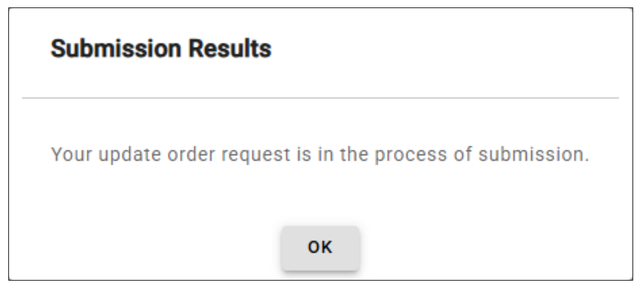
From the **All Services** screen, click the **Open** icon (to the right of the entry which opens to the **Order Status** tab. Click the **Send Additional** tab.

From this screen, the user can enter a **Message/Comments** up to a maximum of 1000 characters. Upload or select documents from the Documents folder. Identify whether the document is for Title, Escrow or Title and Escrow by checking the corresponding radio button. Multiple documents can be attached. The integration supports .pdf, .doc, .docx, .jpg, .bmp, .tiff, and .html documents. Identify this as a CD transaction by checking the This is CD transaction check box.

Click the **Send** button to submit to the Provider.



Once the message and/or documents are sent, the **Submission Results** message displays. Clicking the **OK** button returns the user to the **Order Status** screen.



Note: Sending documents or comments does not change the **Task/Activity History** grid. This grid is only to show the tasks that have been completed by the **SoftPro Agent** for the order.

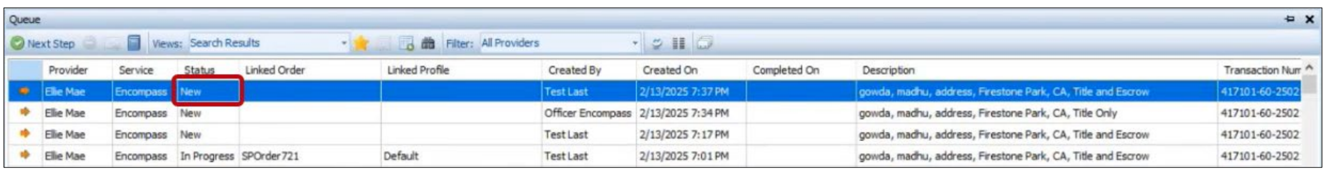
Managing New Orders in 360

Receiving a New Order

When a new order request has been submitted by an Encompass customer, an email notification is sent to the Notification Email Address (added when the SoftPro customer is set up) for the Provider. An example of the email notification can be found in Appendix A.

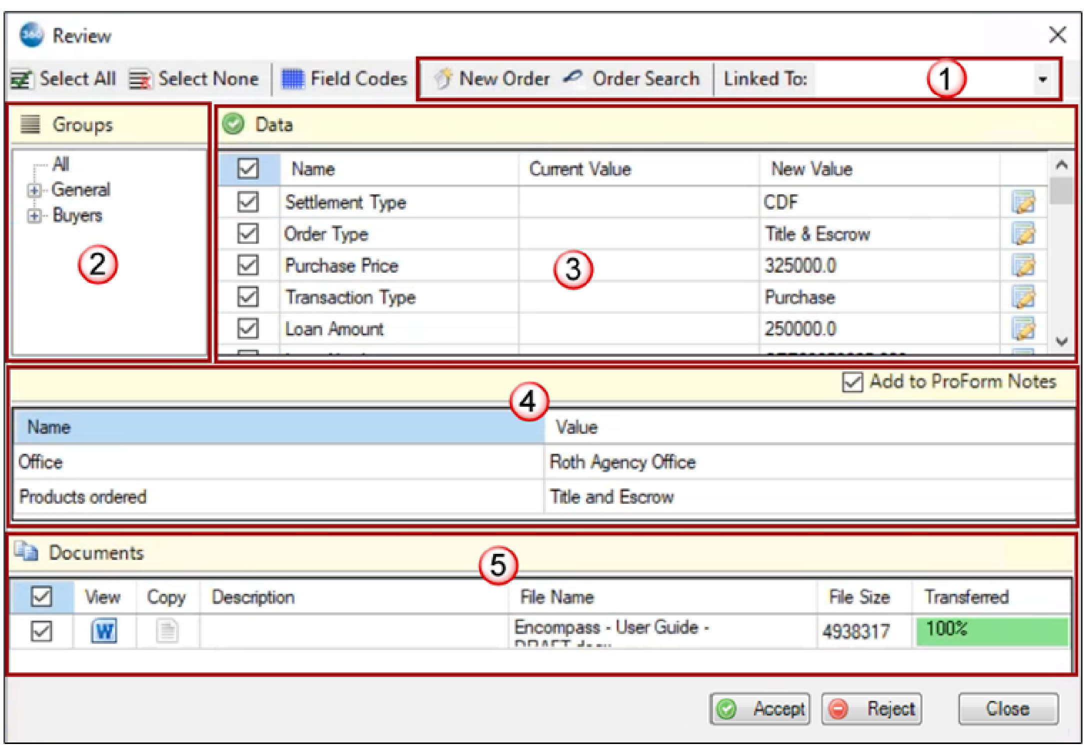
The Queue

The **360 Queue** displays a new Encompass order as a **New** transaction for each service requested (i.e., Title and Escrow services). Clicking the **Next Step** button opens the selected transaction for review.



The Review Screen

The **Review** screen populates the data and documents for the transaction.



Linking Transaction to an Order (1)

Before you can import the data and documents, the new transaction must be linked to an Order in Select. Selecting **New Order** opens the **Create Order** screen or you can use **Order Search** to open the Search screen and link the transaction to an existing Order. Any orders already opened in Select will display in the **Linked To** dropdown box for selection. Once the order number populates in the **Linked To** field, the data and documents in the Review screen are available for accepting into ProForm.

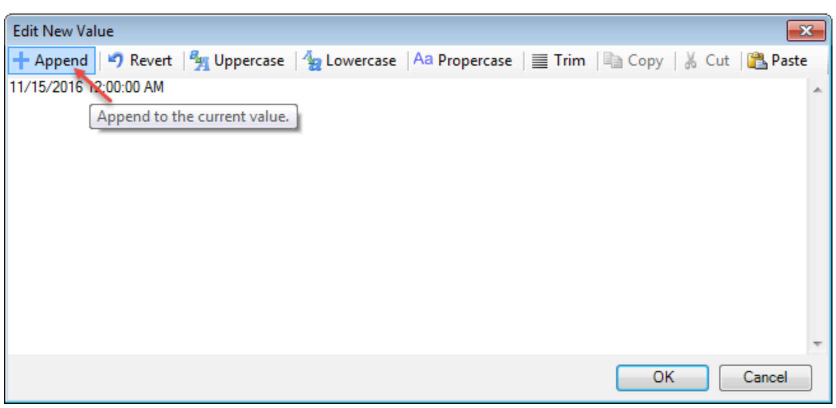
Groups Section (2)

In the Groups Section, the data from Encompass is grouped by category and contact type for easier navigation to a desired field or group of fields. Selecting a **Group** will display only that **Group's** data in the adjacent Data Section. Selecting **All** in the Group tree will display all the data that has been submitted from the new Encompass order.

Data Section (3)

The Data Section displays the data sent from the Encompass order in the **New Value** column. This data has been mapped to the fields listed in the **Name** column. Any data that already exists in the Select Order will display in the **Current Value** column. By default, all the data from the encompass order is selected for importing into the linked ProForm order.

- Using the scroll bar on the right side of the Data Section allows you to review the data for the **Group(s)** selected in the **Groups** section.
- The checkbox to the left of each field **Name** can be unchecked to exclude the Encompass **New Value** from being imported into the linked order. All data can be included or excluded by selecting the checkbox in the Data Section header.
- The **Edit** icon to the right of each **New Value** opens the **Edit New Value** window where you can change the **New Value** to be imported for that field. Hovering your curser over the options at the top of the window opens a description of each editing feature in this window.



Notes Section (4)

The Encompass user can send comments with a new order. These comments are populated to the Notes section of the Review screen. This Section also displays the following information:

- **Office**
- **Products ordered**
- **Comments**

By default, notes and comments are selected to be imported into the linked order. To exclude these notes from being imported, you can uncheck **Add to ProForm Notes.**

Documents Section (5)

Any documents that the Encompass customer sends with the new order are listed in the Documents section on the Review screen. Clicking the **PDF icon** opens the document in Adobe for viewing. Clicking the **Copy icon** copies the image of the document to a clipboard from which it can be pasted into an external application. By default, all documents are selected for importing into the linked order.

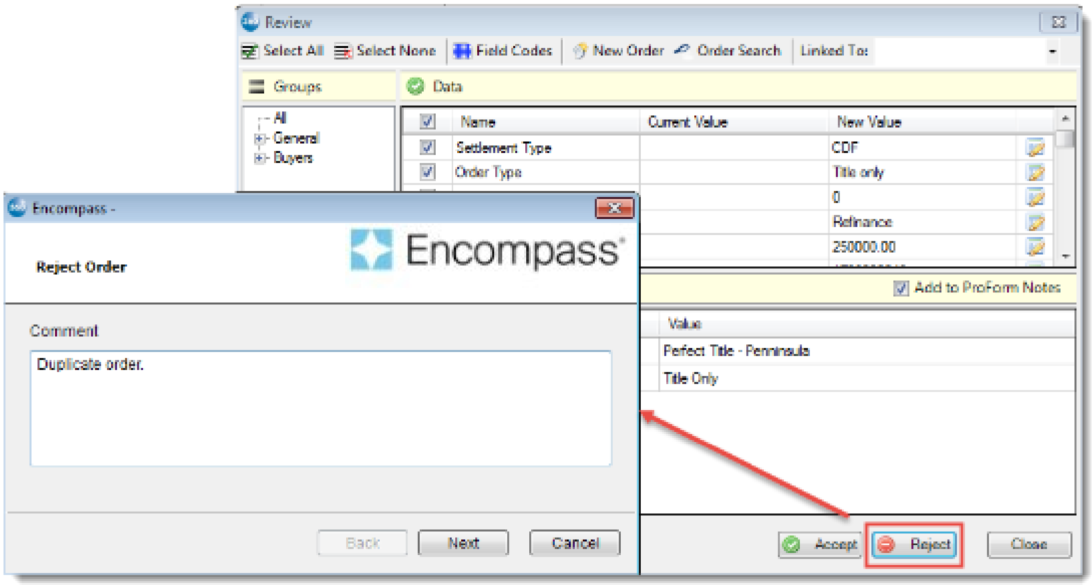
Accepting the Transaction

After the new transaction is linked to an order in ProForm, it can be accepted by selecting **Accept** in the lower right of the Review screen. This imports the New Values into their respective fields in the linked order. Notes are populated in the Notes section of the order, and documents will be attached to the order and displayed in the Attachments screen. The Review screen will close when importing is completed, and the transaction status in the Queue will change to **In Progress.**

Upon acceptance of a new transaction, an email will automatically be sent to the Encompass user who sent the order. A sample email is shown at **Appendix B**.

Rejecting the Transaction

To reject a new order, select **Reject** in the lower right corner of the Review screen. No data, notes or documents will be imported into the linked order. The **Reject Order** screen opens to allow comments to be sent with the communication to the Encompass lender.



Clicking **Next** opens the **Reject Order** screen. The **Set the order status to Rejected now** check box must be checked to enable the **Submit** button. The transaction status in the **Queue** changes to **Rejected** and the transaction can no longer be opened.

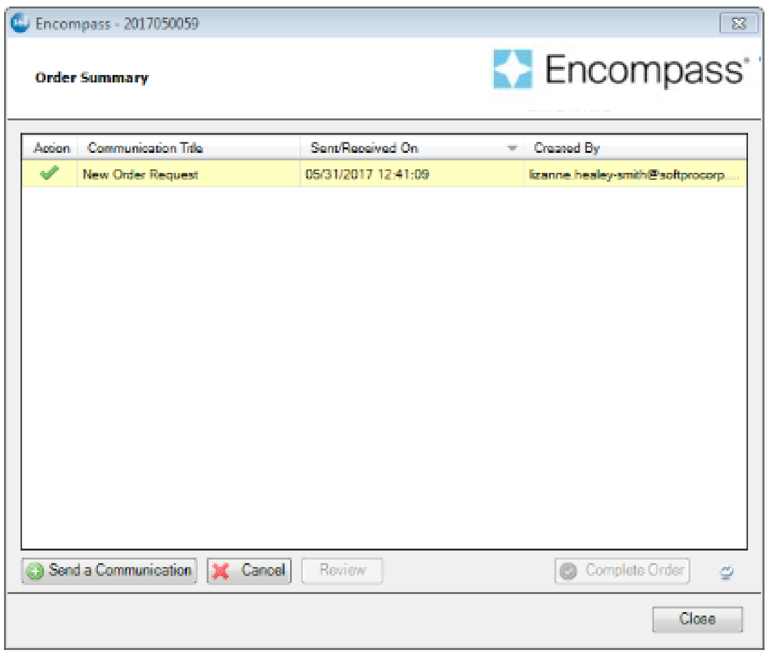
In the **SoftPro Agents** screen, the lender sees the **Order Number** change to **Rejected.** The **Products & Services** section reflects a time-stamped entry that the order was not accepted, and the **Task/Activity History** displays the comment sent with the rejection communication.

The Encompass lender will be able to send a new order the next time the **SoftPro Agents** screen is opened from the Encompass loan file.

Communicating with the Encompass Customer

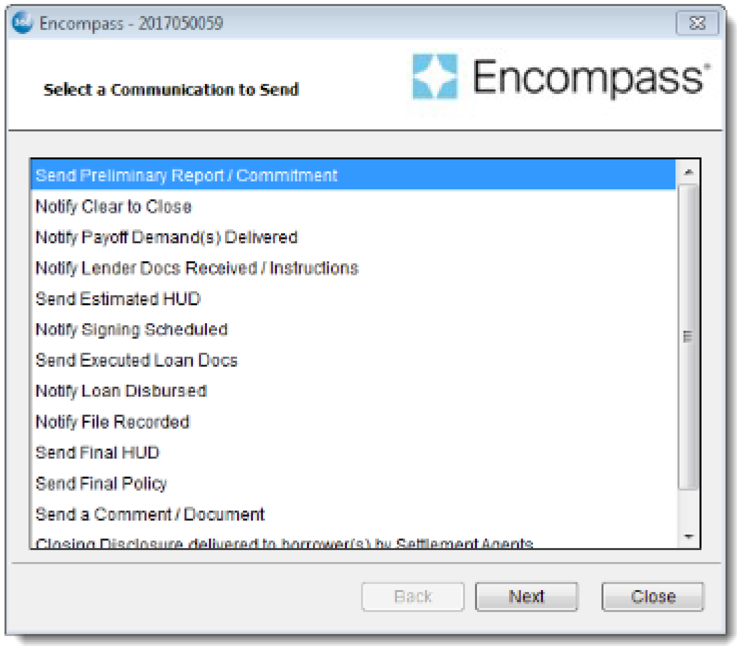
Order Summary Screen in 360

The Encompass integration allows a SoftPro user to send notifications, comments, and documents to an Encompass customer. After an Encompass order has been accepted, opening the transaction opens the **Order Summary** screen. The **Order Summary** grid keeps a record of each communication, the date and time sent or received in 360 and the email address of the person who created it. In addition, the SoftPro user uses this screen to send a communication to the Encompass customer, review any document or comment sent from the Encompass customer to 360, to cancel the order and to close the order by marking it complete.

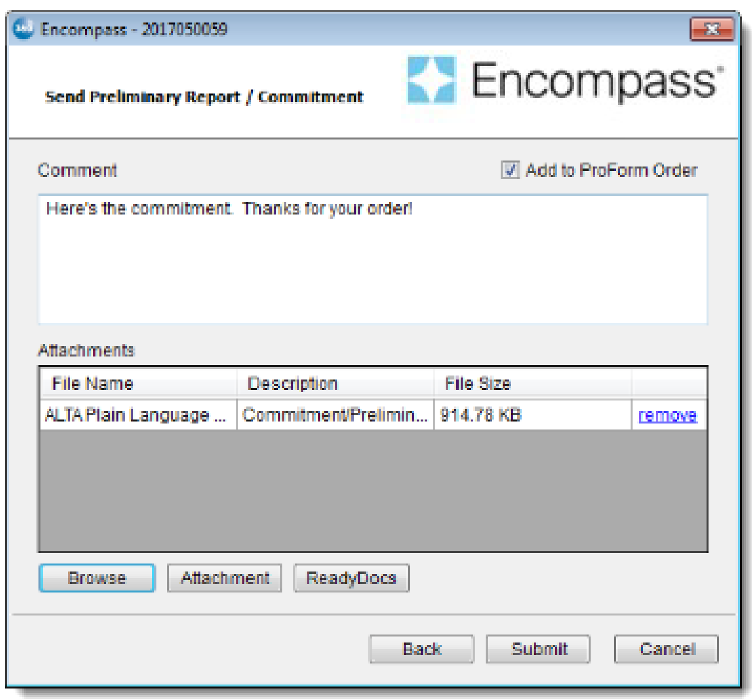


Sending a Communication

To send a notification, document, or comment to the Encompass customer, select the **Send a Communication** button. This opens a screen to **Select a Communication to Send.**

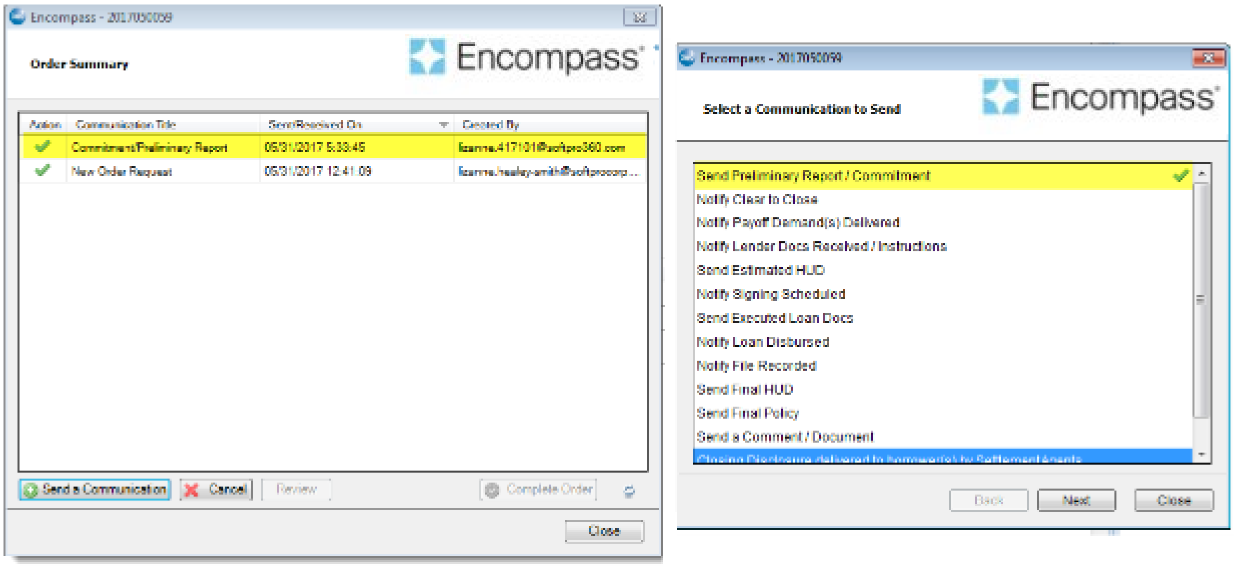


This screen lists the communications that can be sent to the Encompass customer. Selecting a communication and clicking the Next button opens the screen to add a comment or attach a document to the communication.



The **Add to ProForm Order** checkbox gives the user the option to add a note to the ProForm order with the details of the Communication. It is checked by default. Clicking the **Submit** button sends the communication to the Encompass customer.

The **Communication** is added to the **Order Summary** screen and **Added** ✔ icon is shown for the Communication in the **Select a Communication to Send** screen.

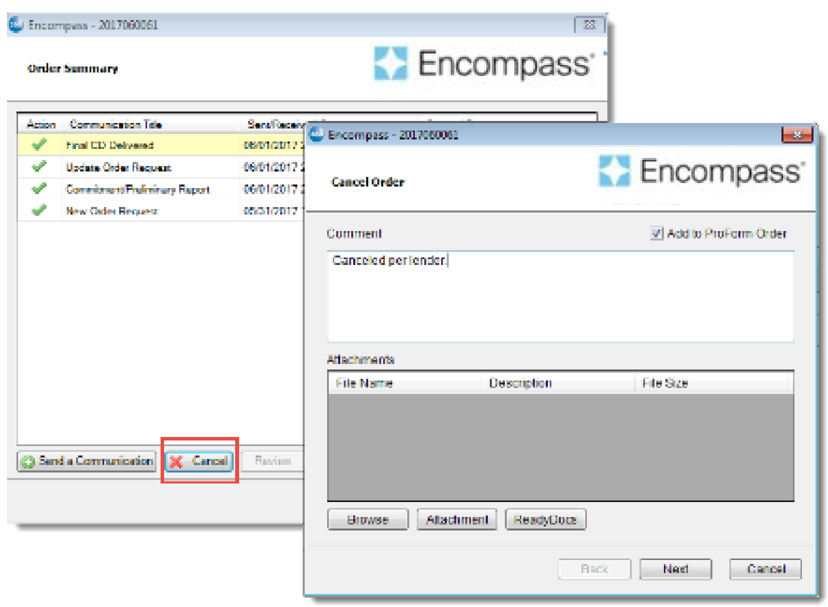


With the exception of the **Send a Comment/Document**, each communication type can only be sent once. The **Send a Comment/Document** communication may be sent multiple times.

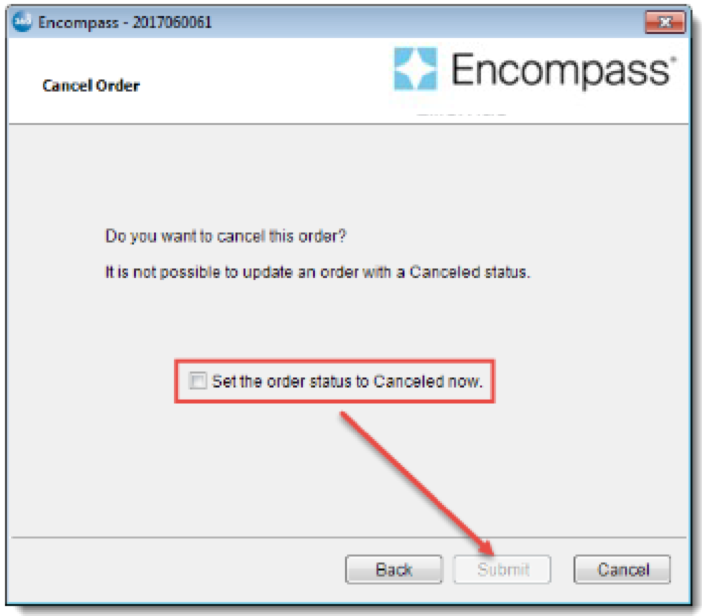
Canceling an Order

An order can be canceled at any time. Selecting the **Cancel** button opens the **Cancel Order** screen to comments or documents to the communication.

Selecting **Next** opens the **Cancel Order** screen.



The checkbox to **Set order status to Canceled now** must be checked in order to **Submit** the communication to the Encompass lender.

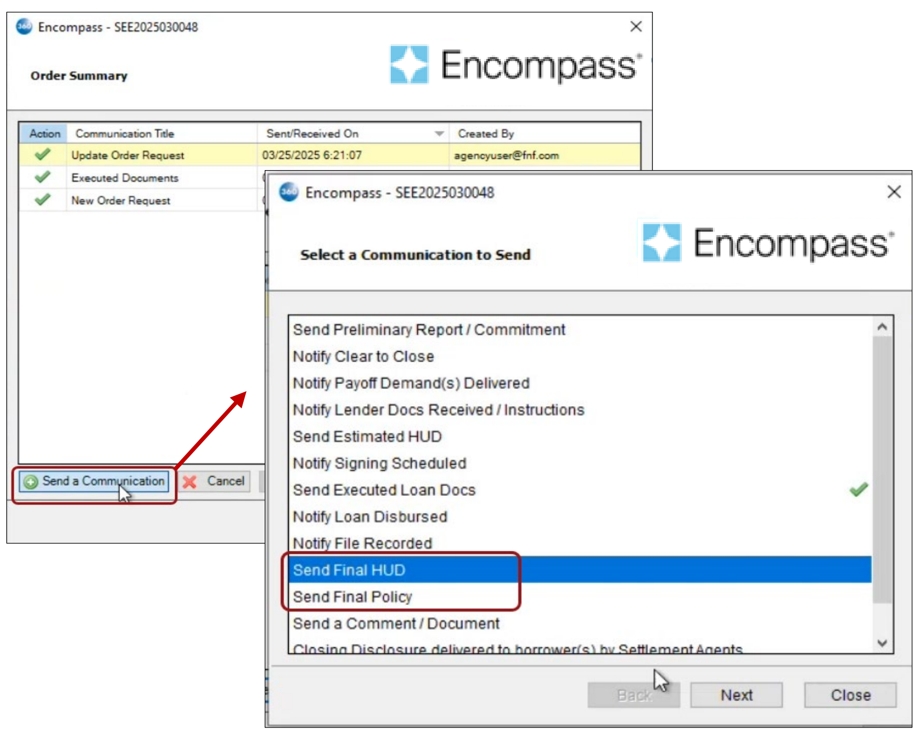


When the transaction is Accepted into SoftPro, the **Order Status** is set to **Canceled** in the Select Order.

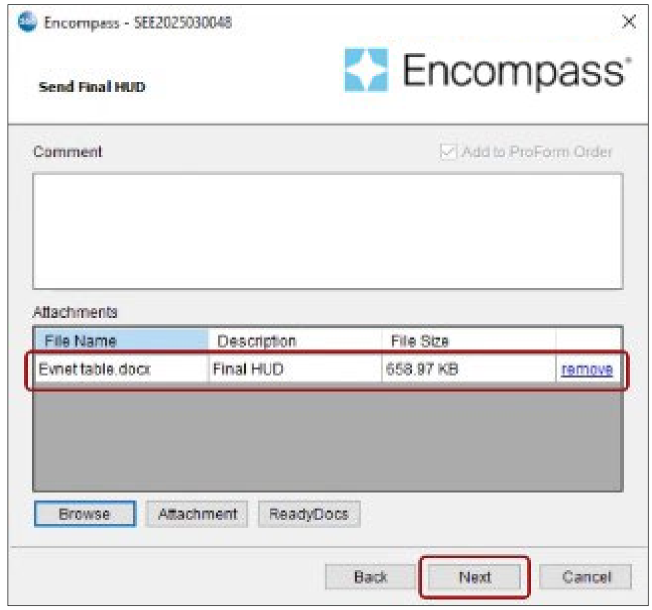
Completing an Order

To complete an order, click the **Send a Communication** button on the **Order Summary** screen.

Select the applicable Communication reason and click the **Next** button.

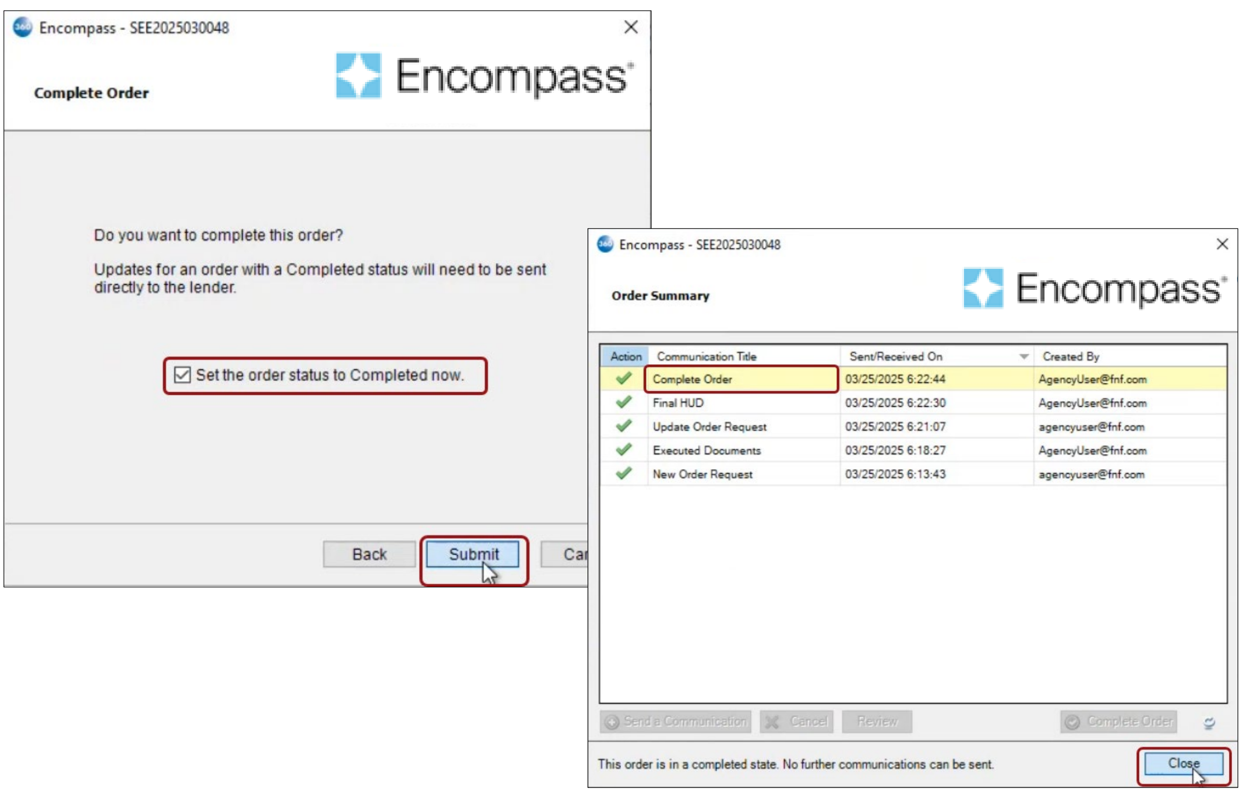


We selected the **Send Final HUD** entry which opens the **Send Final HUD** dialog allowing us to add the document. Once the document is attached, click the **Next** button.



When prompted, check the **Set the order status to Completed now** check box; this updates the Lender's Encompass Order once submitted.

Click the **Submit** button. The **Order Summary** window shows the recent communication to **Complete Order**, and you can now click the **Close** button.



Administrator – Setting Up the Service Provider

Integration Setup

NOTE: Administrator credentials are required for the **ADMIN** module to be visible and set up the Service Provider via the **Company/User Setup**.

Pre-Requisites for setup:

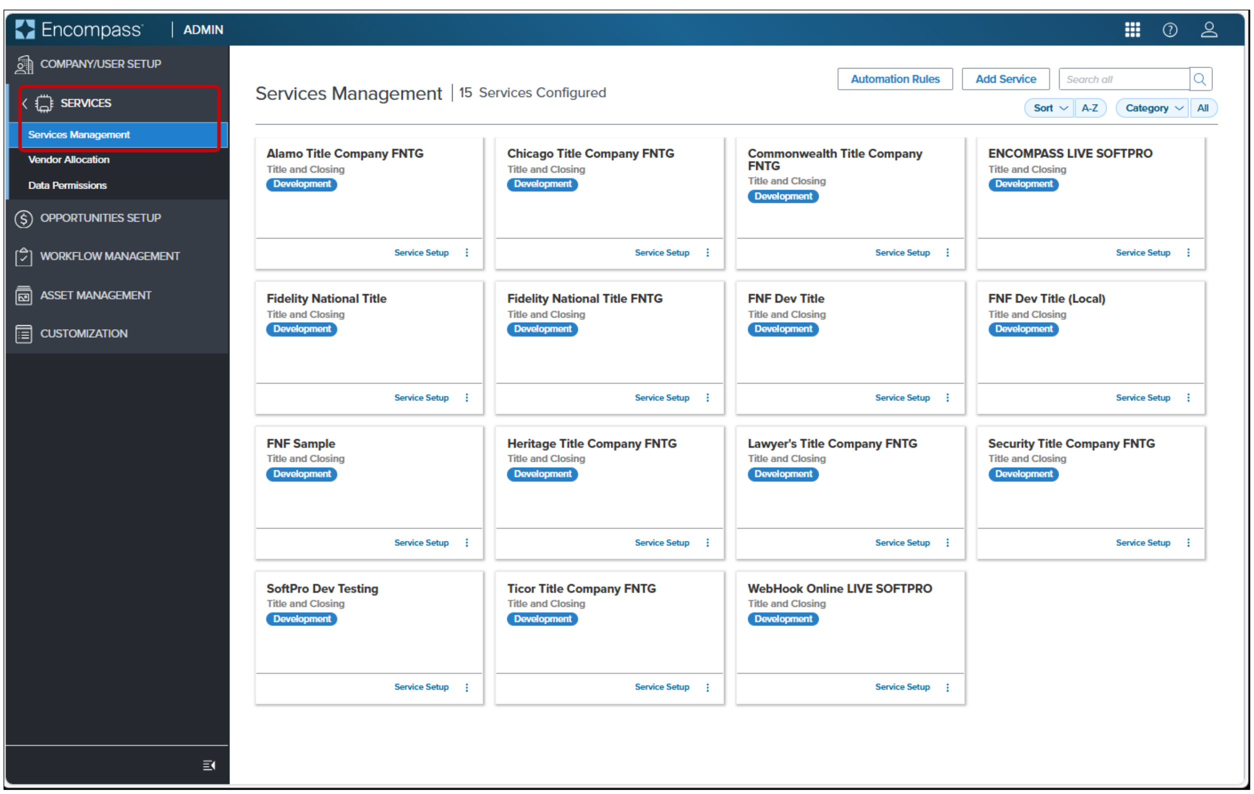
1. Admin credential to Encompass Partner Connect (EPC)
2. Product Registration is completed by the Development Team and ICE
3. ICE-EPC URL: https://encompass.ice.com

Configuring a Service Provider

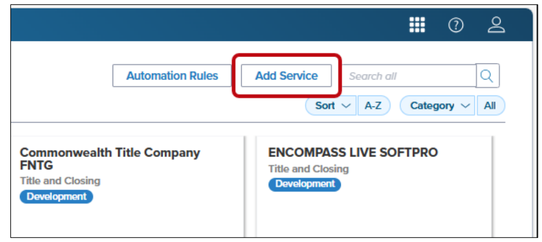
Once logged into Encompass, from the menu (on the left),

1. Click the **Services** option and select **Services Management** to open the **Services Management** screen

The **Services Management** screen displays cards for all existing service setups for Manual Order. Only one Manual Order can be set up for the selected Service.



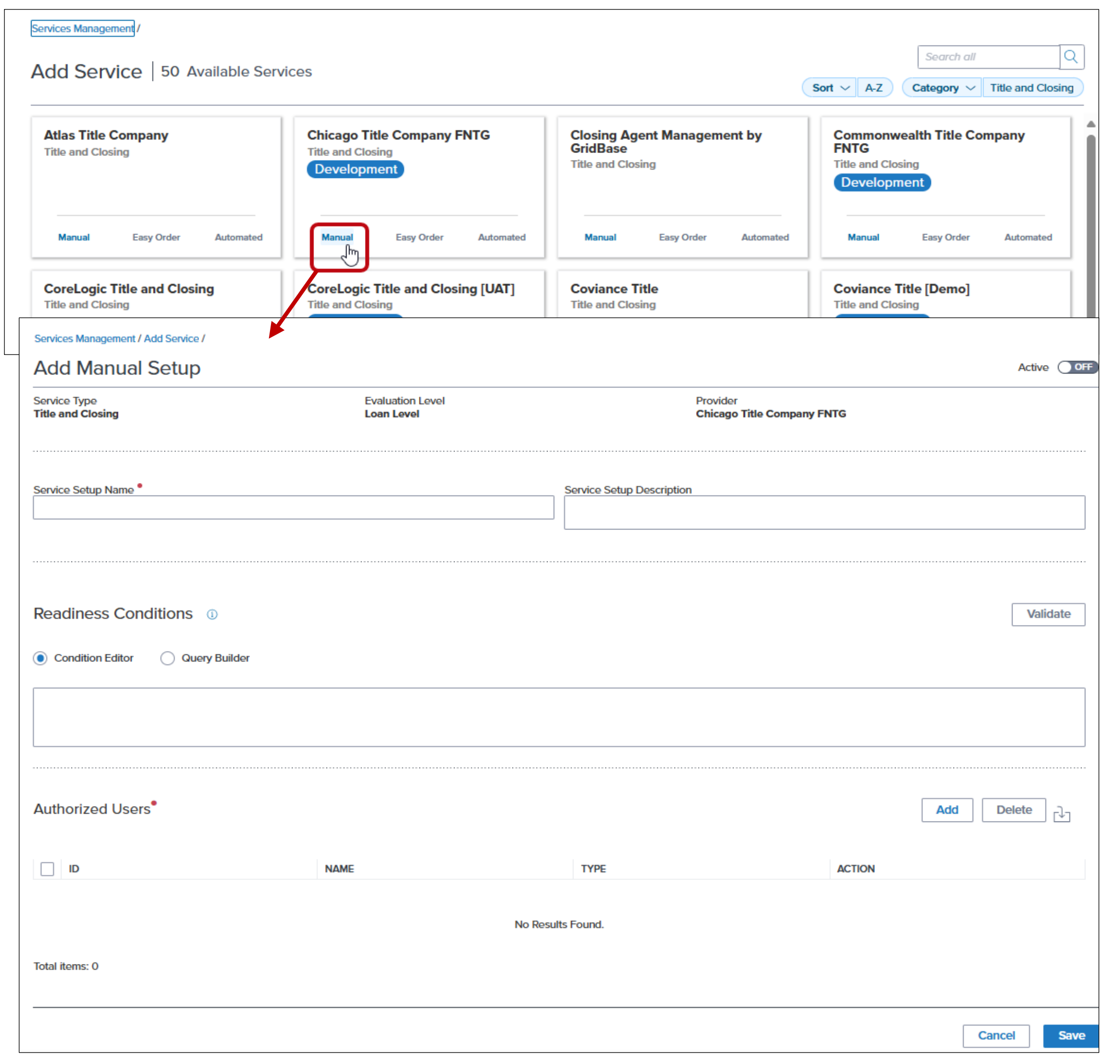
2. Click the **Add Service** button (to the right)



3. When prompted, from the **Category** drop-down, select **Title and Closing**
4. Click **Retrieve Products** button

This opens the **Add Services** screen, displaying the available services for the selected Category.

5. Click the **Manual** link on the Service card you wish to add

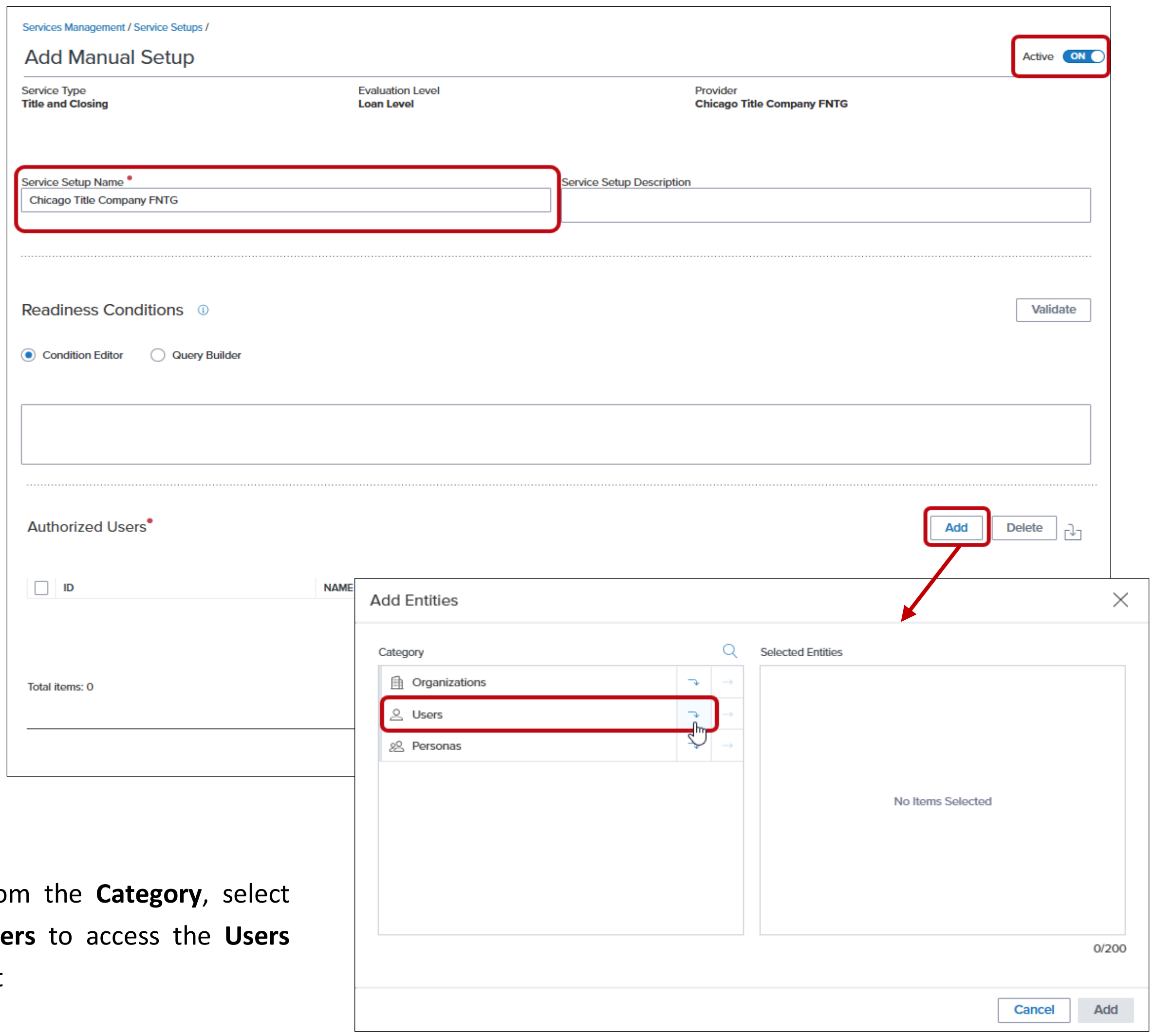


From the **Add Manual Setup** screen,

6. Click the **Active** toggle (upper right) to enable the integration and accessibility for the Lender. This can be done before or after the setup information has been entered.

7. Enter the **Service Setup Name** (required) and a **Service Setup Description** (optional); this is what is visible to the Lender user

8. Add **Authorized Users** by clicking the **Add** button (to the right); at least one user must be added to add the Service

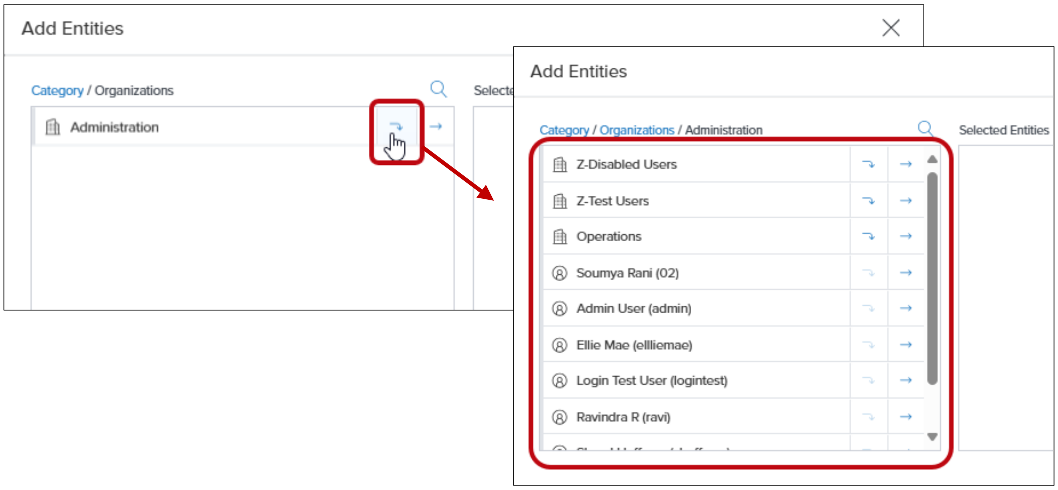


9. From the **Category**, select **Users** to access the **Users** list

   At least one user must be added to enable the service.

   If **Organization** is selected, all users entered for the Organization are included. The **Users** list includes users listed under an Organization. **Persona** is the role type (i.e., Loan Officer, Funder, Closer, etc.).

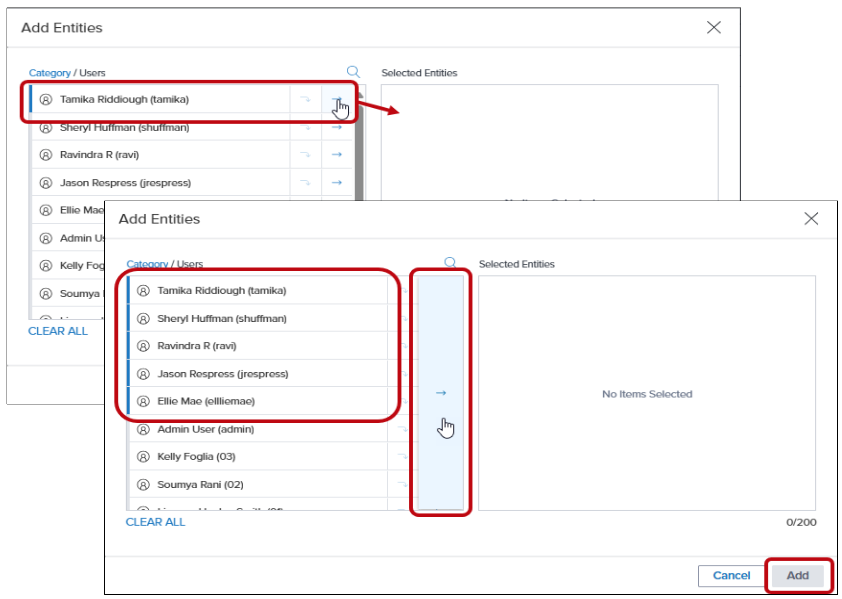
To view the users entered under an **Organization**, click the down arrow for the Organization selected.



10. Click the **Add**  icon to move the User from the **Category / Users** field to the **Selected Entities** field

    To select multiple users, click each user name.

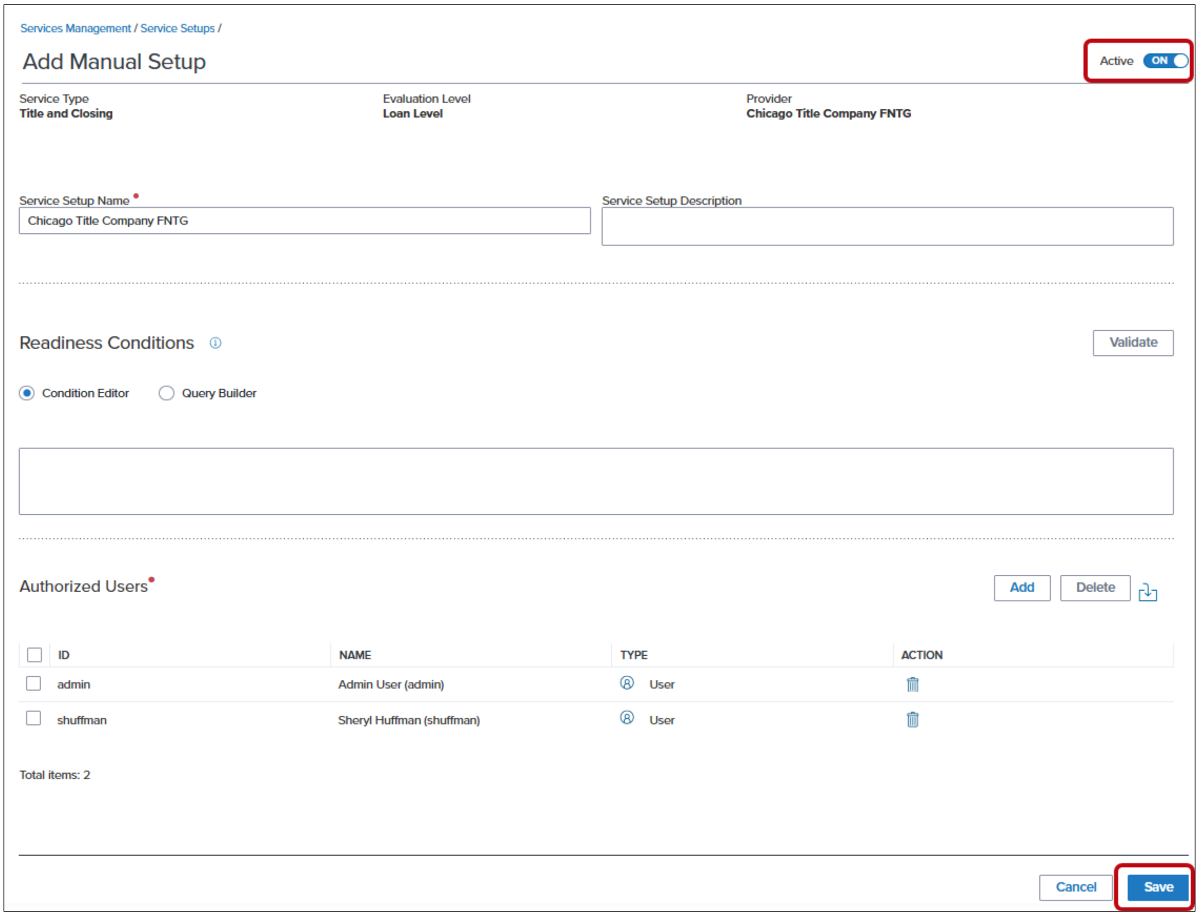
    Up to 200 users can be selected at one time before moving users to the **Selected Entities** list.



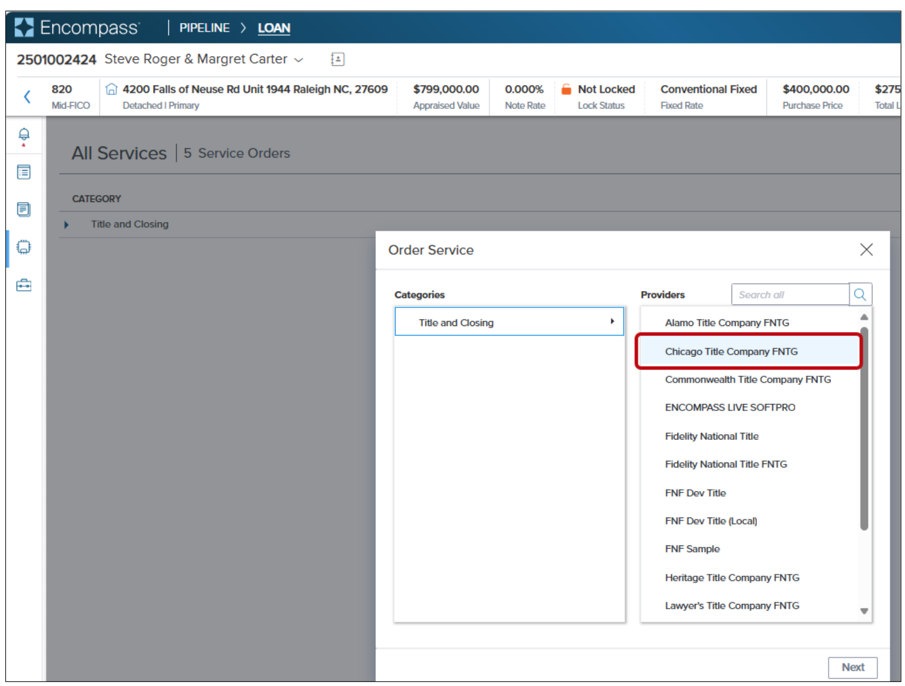
11. Click the **Add** button to add selected users and return to the **Manual Setup** screen

12. Verify the **Active** toggle has been set to **On**

13. Click the **Save** button



When ordering a service, the newly added integration is available in the **Providers list** for a User who has been added as an **Authorized User**.



Entering Company Credentials

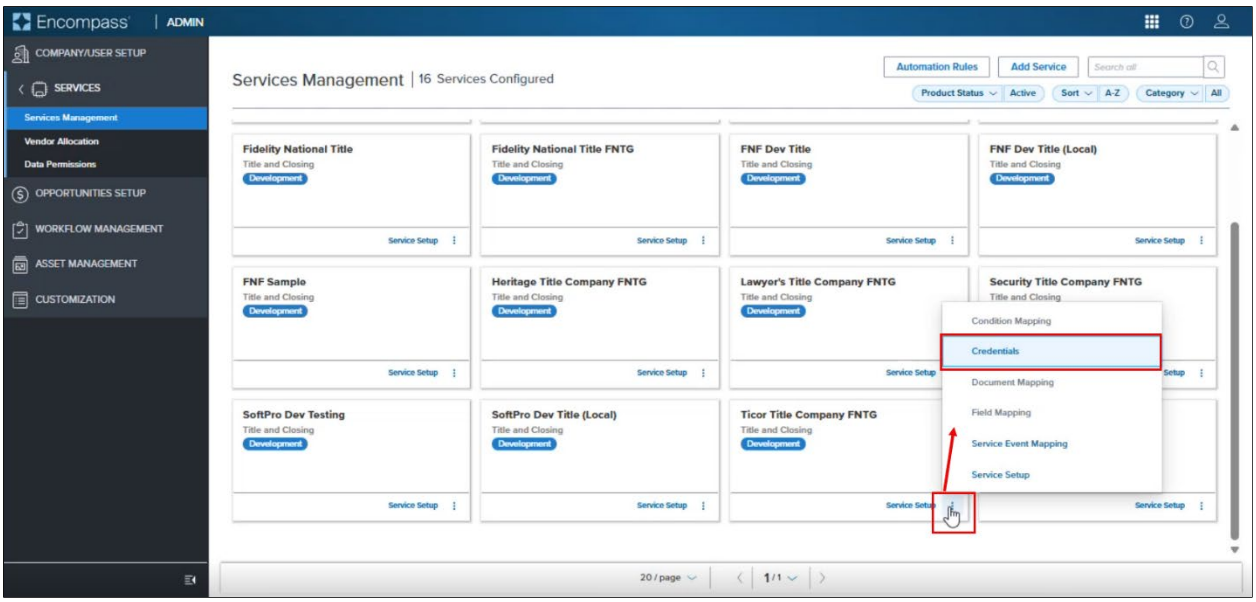
The integration supports client credentials to authenticate users without providing username and password to provide a seamless experience at the same time maintaining security standards. Each lender is provided their own set of **Client ID** and **Client Secret** provided by SoftPro. These credentials are entered in the **Credentials** section of the **Admin** page.

Once logged into Encompass, from the menu (on the left),

1. Click the **Services** option and select **Services Management** to open the **Services Management** screen

In the lower right of the tile for the **Service** you wish to enter Credentials,

2. Click the more ⋮ icon and select **Credentials** from the menu

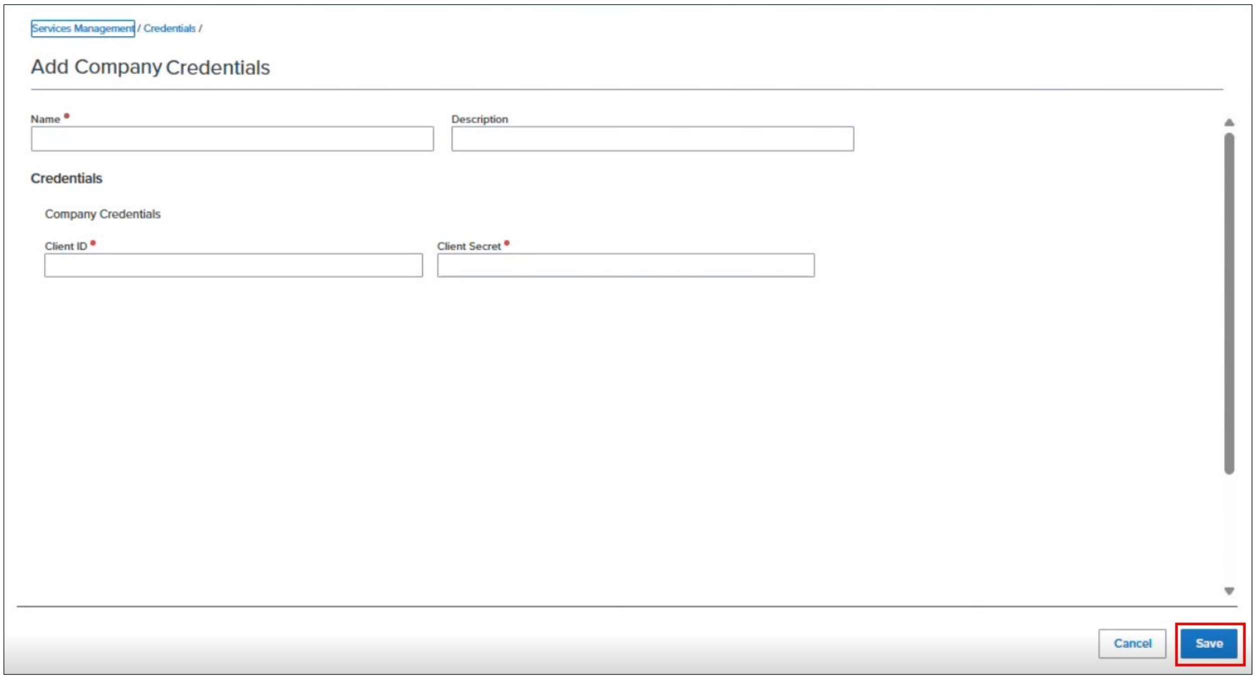


3. Click the **Add** button to open the **Add Company Credentials** page

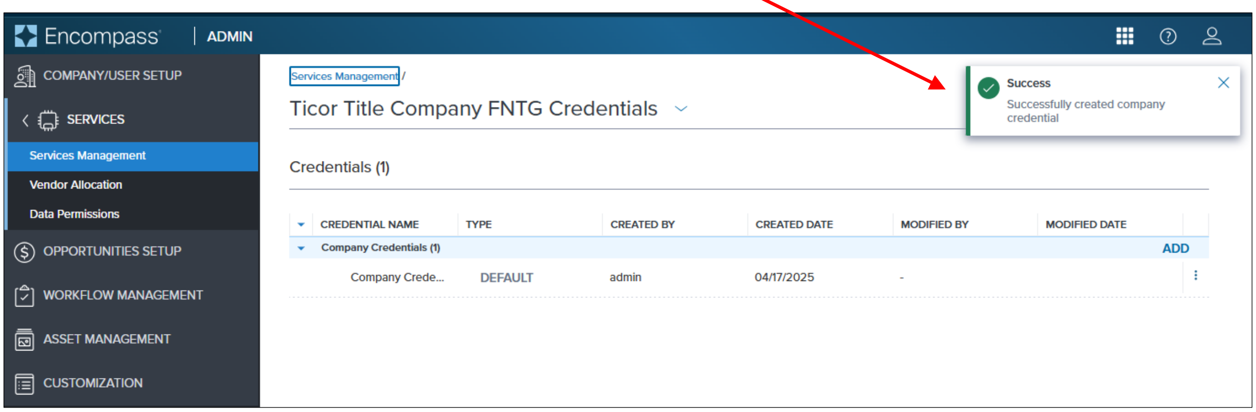
4. Enter the required Company information
   a. **Name**
   b. **Description**
   c. **Client ID**
   d. **Client Secret**

   Provided by SoftPro

5. Click the **Save** button



A confirmation message is displayed once successfully saved.



Document Mapping

Document Types can be mapped with the **eFolder Document Folders** to enable which document types are to be saved to which eFolder Document Folder. When mapped, documents received from SoftPro 360 are then automatically saved to the mapped eFolder Document Folder.

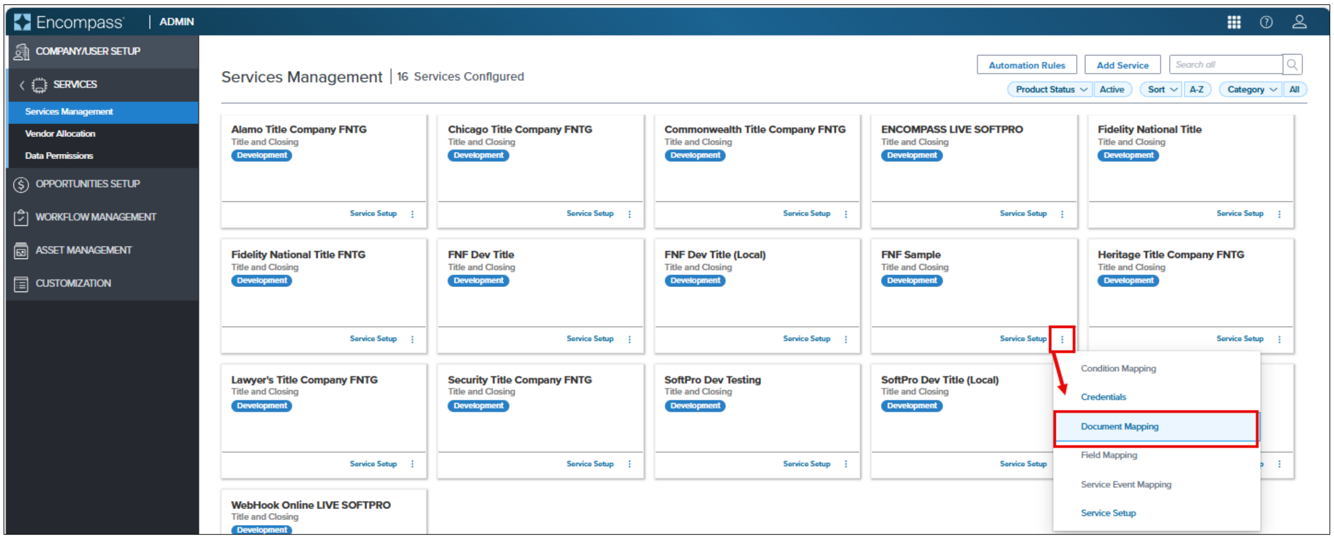
To set up the document mapping,

Once logged into Encompass, from the menu (on the left),

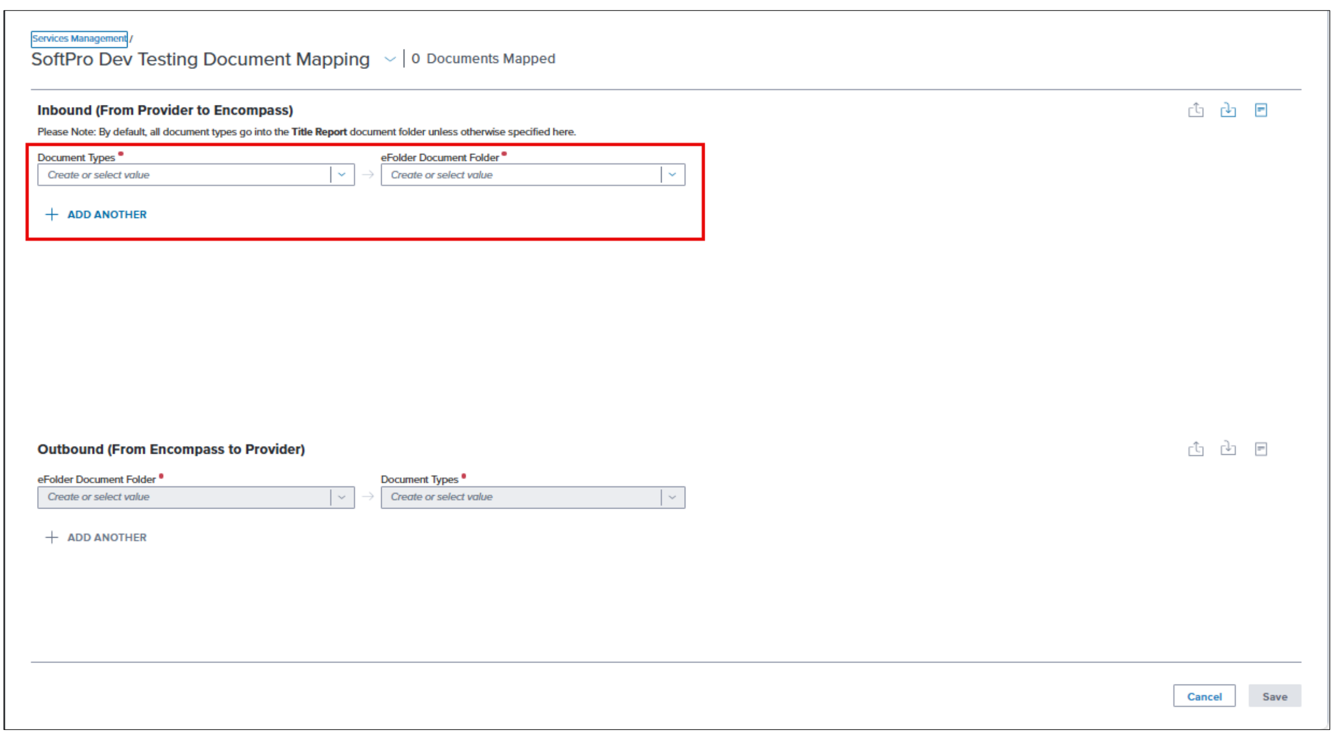
1. Click the **Services** option and select **Services Management** to open the **Services Management** screen

In the lower right of the tile for the **Service** you wish to set up,

2. Click the more  icon and select **Document Mapping** from the menu



From the **Document Mapping** screen, you'll select the **Inbound Document Type** and the corresponding **eFolder Document Folder** the received document will be saved to using the list of **Doc Description/Doc Type** entries from the table below.



3. Select the,
    a. **Document Types** (corresponds to the **Doc Description/Doc Type**)

S.No	360Activity Name	Doc Description/Doc Type
1	Send Prelim/Commitment	Commitment/Preliminary Report
2	Notify Clear to Close	Clear to Close
3	Notify Payoff Demand(s) Delivered	Payoff Demand
4	Notify Lender Docs Received/Instructions	Other
5	Send Estimated HUD	Estimated HUD
6	Notify Signing Scheduled	Other
7	Send Executed Loan Docs	Executed Documents
8	Notify Loan Disbursed	Other
9	Notify File Recorded	Other
10	Send Final HUD	Final HUD
11	Send Final Policy	Final Policy
12	Send a Comment/Document	Other
13	Closing Disclosure Delivered to Borrowers	Borrower CD
14	Final Closing Disclosure/HUD Delivered	Final CD

    b. **eFolder Document Folder**
    c. Click the Add Another link to add additional entries

4. Repeat **step 3** until all **Document Types** and their corresponding **eFolders** have been selected

5. Click the **Save** button

From: noreply@softpro360.com
Sent: Wednesday, May 31, 2017 12:41 PM
To: Healey-Smith, Lizanne <lizanne.healey-smith@Softprocorp.com>
Subject: New Order Placed - Encompass - Loan Number: 1705000236A

New Order Placed - Encompass

Ordered By	
Company	
Name	
Phone	
Email	
Order Details	
Transaction Type	Refinance
Estimated Closing Date	6/9/2017
Need by Date	
Sales Price	$0.00
Loan Amount	$250,000.00
Loan Number	1705000236A
Order Type	TitleAndEscrow
TitleAndEscrow Office	Trusty Title and Closing - Alexandria, VA
TitleAndEscrow Officer	
TitleAndEscrow Product Type	Title and Escrow
Property Details	
Property Type	Single Family
Property Street Address	123 Any St
City, State, Zip	Carbon Hill, OH 43111
Property County	Hocking
Buyer/Borrower 1	
Name	Bob Borrower
Phone	(888)123-4567
Cell Phone	
Work Phone	
Email	email@email.com
SSN Last 4	
Mailing Street Address	123 Anywhere St
Mailing City, State, Zip	Carbon Hill, OH 43111
Buyer/Borrower 2	
Name	Betty Borrower
SSN Last 4	
Instructions	
Please order the payoff. Thanks!	