

## Managing Encompass Transactions in SoftPro 360

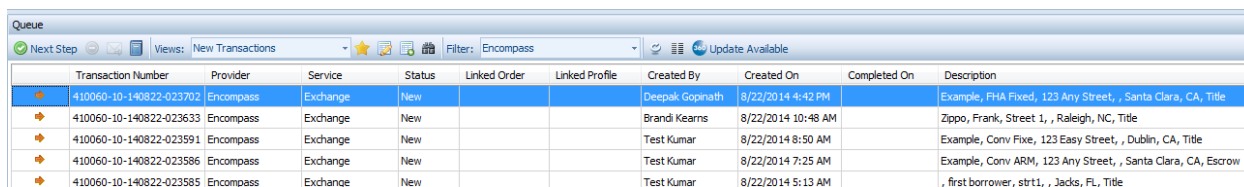
### How to Review/Accept Transactions

The SoftPro 360 integration with Encompass provides the ability to receive Title and/or Escrow order requests and documents electronically from Encompass customers. In addition to accepting order requests, a new order can be created with an extended amount of data seamlessly flowing into ProForm increasing productivity, efficiency and removing data re-entry.

### Accessing New Encompass orders in the SoftPro 360 queue

New orders sent from Encompass will appear in the SoftPro 360 queue under the view 'New Transactions'. In addition, an email notification of the new order will be sent to the SoftPro 360 user.

A new Title order and Escrow order will appear in the SoftPro 360 queue as two separate transactions. The Description column will indicate the product requested.



Transaction Number	Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On	Completed On	Description
410060-10-140822-023702	Encompass	Exchange	New			Deepak Gopinath	8/22/2014 4:42 PM		Example, FHA Fixed, 123 Any Street, Santa Clara, CA, Title
410060-10-140822-023633	Encompass	Exchange	New			Brandi Kearns	8/22/2014 10:48 AM		Zippo, Frank, Street 1, Raleigh, NC, Title
410060-10-140822-023591	Encompass	Exchange	New			Test Kumar	8/22/2014 8:50 AM		Example, Conv Fixe, 123 Easy Street, Dublin, CA, Title
410060-10-140822-023586	Encompass	Exchange	New			Test Kumar	8/22/2014 7:25 AM		Example, Conv ARM, 123 Any Street, Santa Clara, CA, Escrow
410060-10-140822-023585	Encompass	Exchange	New			Test Kumar	8/22/2014 5:13 AM		, first borrower, strt1, Jacks, FL, Title

To review a new transaction, highlight the transaction, then click the 'Next Step' button. The Review screen will display all the data and documents sent from Encompass to SoftPro 360. All data with a checkmark in the check box will be accepted into a ProForm order. By default all check boxes are checked. The incoming data sent from Encompass will be displayed under the New Value column. The Current Value column displays data that is currently in the order. Clicking the 'Field Codes' button will open a column and display all of the ProForm field codes that the new value will flow into. The incoming values are also broken down into 'Groups'. A specific 'Group', such as Buyer, can be expanded so that only the new incoming values for that group are viewed.

If the new or updated order have any notes or comments attached, the 'Add To ProForm Notes' will be checked by default and the information will be added to the Notes section of the ProForm order.

To view a document, click the .PDF icon in the View column. To copy a document to the clip board, click the copy icon in the Copy column. The document(s) will be pushed to the SmartView folder, SPIImage for Classic or Attachments/Document History for Select.

**Review**

Select All Select None Field Codes New Order Order Search Linked To:

**Groups**

- All
- General
- Loans
- Buyers
- Properties

**Data**

<input checked="" type="checkbox"/>	Name	Current Value	New Value	
<input checked="" type="checkbox"/>	Transaction Type		Purchase	
<input checked="" type="checkbox"/>	Settlement Date		1/1/0001	
<input checked="" type="checkbox"/>	Settlement Date Estimated?		False	
<input checked="" type="checkbox"/>	Number		1408EM000003	
<input checked="" type="checkbox"/>	Type		FHA	

☒ Add to ProForm Notes

**Comments**

Name	Value
Comment	New Order

**Documents**

<input checked="" type="checkbox"/>	View	Copy	Document Name	File Name	File Size	Transferred
<input checked="" type="checkbox"/>			[Untitled].pdf		868933	100%

Accept Reject Close

There are three options to attach the data into a ProForm order: Create a New Order, Search for an order, or Linking To an order that is currently opened in ProForm.

New Order Order Search Linked To: 2013030226

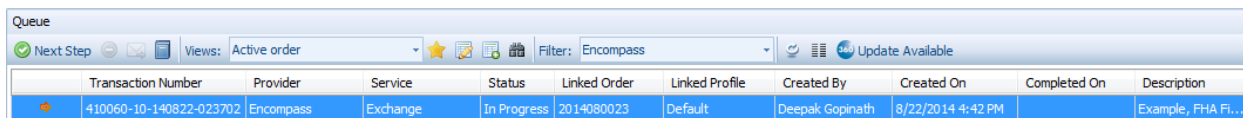
- Click the 'New Order' button to open the ProForm New Order screen. Once the New Order information (Prefix, Suffix, Order Number, Trust account and template) has been entered click OK. Clicking OK will place the New Order number into the Linked To field on the Review screen.
- Click the 'Order Search' button to open the ProForm Order Search screen. Highlight and double click the desired order number. The chosen order number will be placed into the Linked To field on the Review screen.
- If the ProForm order that the data should be entered into is already open, click the 'Linked To' drop down and select the ProForm order number.

Once the ProForm order number has been selected and is displayed in the 'Linked To' field of the Review screen, click the 'Accept' button. The transaction status in SoftPro 360 will update to 'In Progress'.

**NOTE:** The order can be rejected by clicking the Reject button. Transactions that are rejected will be displayed in the SoftPro 360 queue as 'Rejected' with no further action being available to the transaction. Encompass and the lender will be notified that the order was rejected.

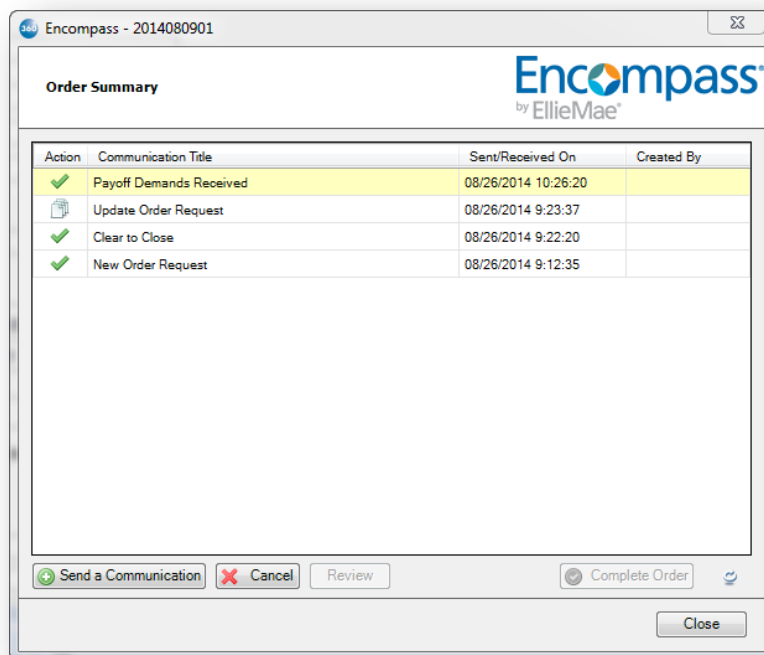
## Updating an 'In Progress' Encompass Transaction

To access the "In Progress" transaction to send communication, change the SoftPro queue to 'Active Order'.




Transaction Number	Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On	Completed On	Description
410060-10-140822-023702	Encompass	Exchange	In Progress	2014080023	Default	Deepak Gopinath	8/22/2014 4:42 PM		Example, FHA Fi...

To update the transaction, click the Next Step button. The summary Screen will be displayed. This screen will show all the communication that has occurred for the transaction. Click the Send a Communication button to open the Select a Communication to Send Screen.



Encompass - 2014080901

Order Summary



Action	Communication Title	Sent/Received On	Created By
✓	Payoff Demands Received	08/26/2014 10:26:20	
✓	Update Order Request	08/26/2014 9:23:37	
✓	Clear to Close	08/26/2014 9:22:20	
✓	New Order Request	08/26/2014 9:12:35	

Send a Communication

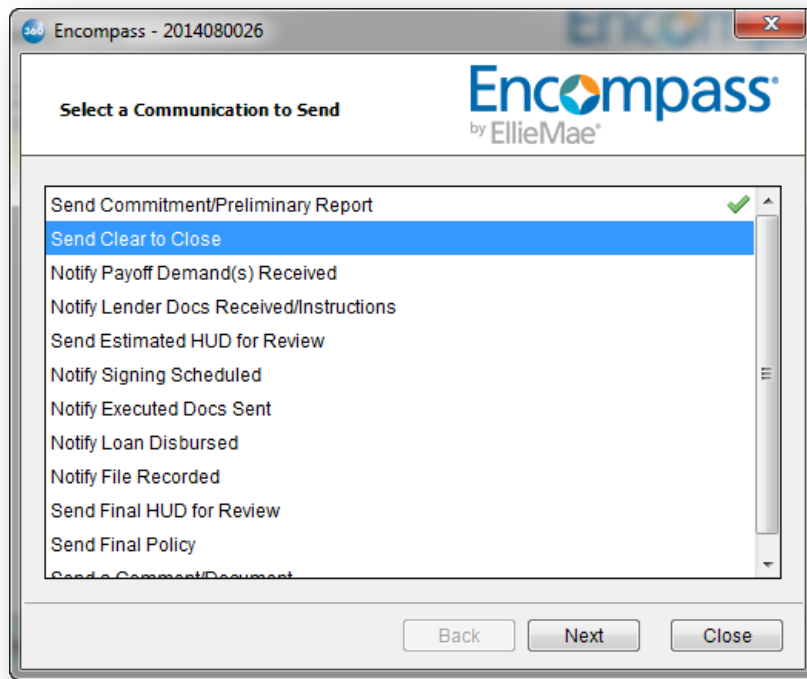
Cancel

Review

Complete Order

Close

Select the Communication then click Next.




The Communication Information Screen allows for both a comment and document to be sent to the Encompass user (lender). A comment can be entered into the comment field. Comments can also be saved to the Proform order by checking 'Add to Proform Notes.' This box is checked by default. Documents can also be added to the communication. Click the Browse button to browse out a file/folder location, click Attachment to attach a document from SmartView (FNF users) SPImage (Standard or Enterprise) or the Attachments & Document History (Select) or click the ReadyDoc Button to open and attach a ReadyDoc from the ReadyDocs tree. The document description will default to the name of the communication selected but can be modified.

**NOTE:** Once a communication type has been sent, it cannot be sent again. A green check will be displayed next to the communication once it has been submitted.

Send a Comment/Document is the only communication that can be sent more than once.

Encompass - 2014080023

**Send Commitment/Preliminary Report** 

Comment ☒ Add to ProForm Order

Send comment back to Encompass user

Attachments


File Name	Description	
[Untitled].pdf	Commitment/Preliminary Report	<a href="#">remove</a>

Browse Attachment ReadyDocs

Back Submit Cancel

The transaction will be submitted and once completed the Summary screen will update with the latest communication sent.

Encompass - 2014080025



**Order Summary** 

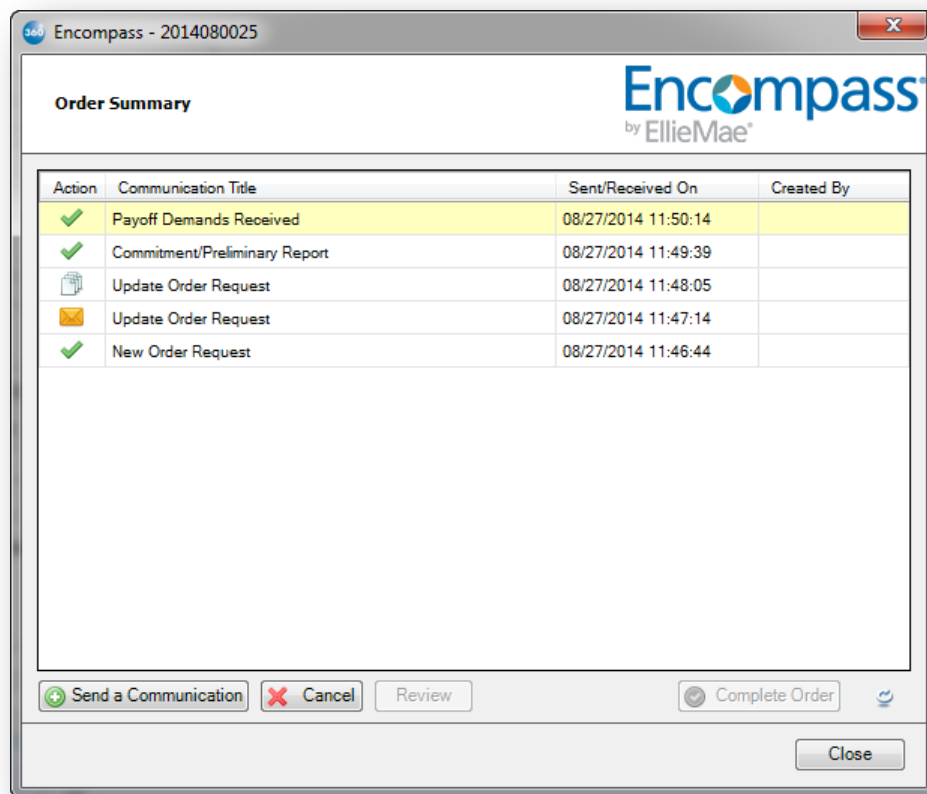
Action	Communication Title	Sent/Received On	Created By
✓	Comment/Documents	09/02/2014 1:01:17	
✓	Executed Documents	09/02/2014 1:01:01	
✓	Clear to Close	09/02/2014 1:00:49	
✓	New Order Request	09/02/2014 12:59:47	

Send a Communication Cancel Review Complete Order

Close

## Reviewing Updates for an Encompass transaction

An envelope  displayed in the Summary screen to the left of the Communication Title indicates an incoming update and/or comment is attached to the transaction. A document  displayed in the Summary screen to the left of the Communication Title indicates an incoming document is attached to the transaction. To view the update, comment, and/or document. Highlight the communication on the order Summary screen and click the Review button to open the Review screen.



The Review screen will display the message and/or documents, which can be added to the ProForm order. The 'Add to ProForm Notes' check box will be checked by default adding the comment to the notes section within the ProForm order. Click Accept to send the Comments to the ProForm order Notes and to be taken back to the summary screen.

Name	Current Value	New Value
Transaction Type	Purchase	Purchase
Settlement Date	9/5/2014 12:00:00 AM	9/5/2014
Settlement Date Estimated?	True	True
Number	1408EM000031	1408EM000031
Type	ConventionalInsured	ConventionalInsured

☒ Add to ProForm Notes

Name	Value
Title Office	Chicago Title - Encompass Integration
Comment	send additional comments to title and escrow

Accept Reject Close

**Note: The Reject button is not enabled for updates to a transaction.**

## Canceling an Order

### Order Canceled by SoftPro 360 user:

An order can be canceled by the SoftPro 360 user or by Encompass. To cancel an order, click the Cancel button.

Action	Communication Title	Sent/Received On	Created By
✓	New Order Request	08/22/2014 4:42:22	

Send a Communication Cancel Review Complete Order Close

The Cancel screen will allow you to cancel the Encompass order. To cancel the order, click the Cancel button on the Summary screen. Comments and documents can be added to the cancel request.

Encompass - 2014080025

**Cancel Order**

Encompass<sup>®</sup>  
by EllieMae<sup>®</sup>

Comment ☒ Add to ProForm Order

Cancel Title Order

Attachments

File Name	Description	
geometry.pdf	Cancel Request	<a href="#">remove</a>

Confirming the order cancel will stop any future incoming and outgoing communication for the order. The transaction will be moved to a Canceled status and a cancelation will be sent to the Encompass user.

Encompass - 2014080025

**Cancel Order**

Encompass<sup>®</sup>  
by EllieMae<sup>®</sup>

Do you want to cancel this order?

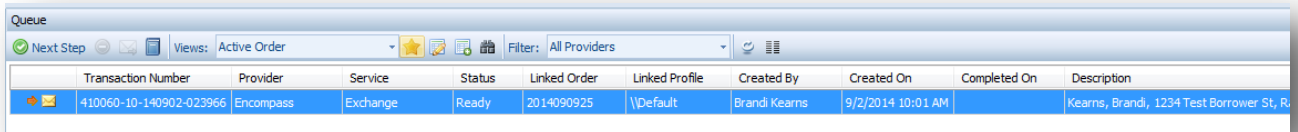
It is not possible to update an order with a Canceled status.

☒ Set the order status to Canceled now.



### Order Canceled by Encompass:

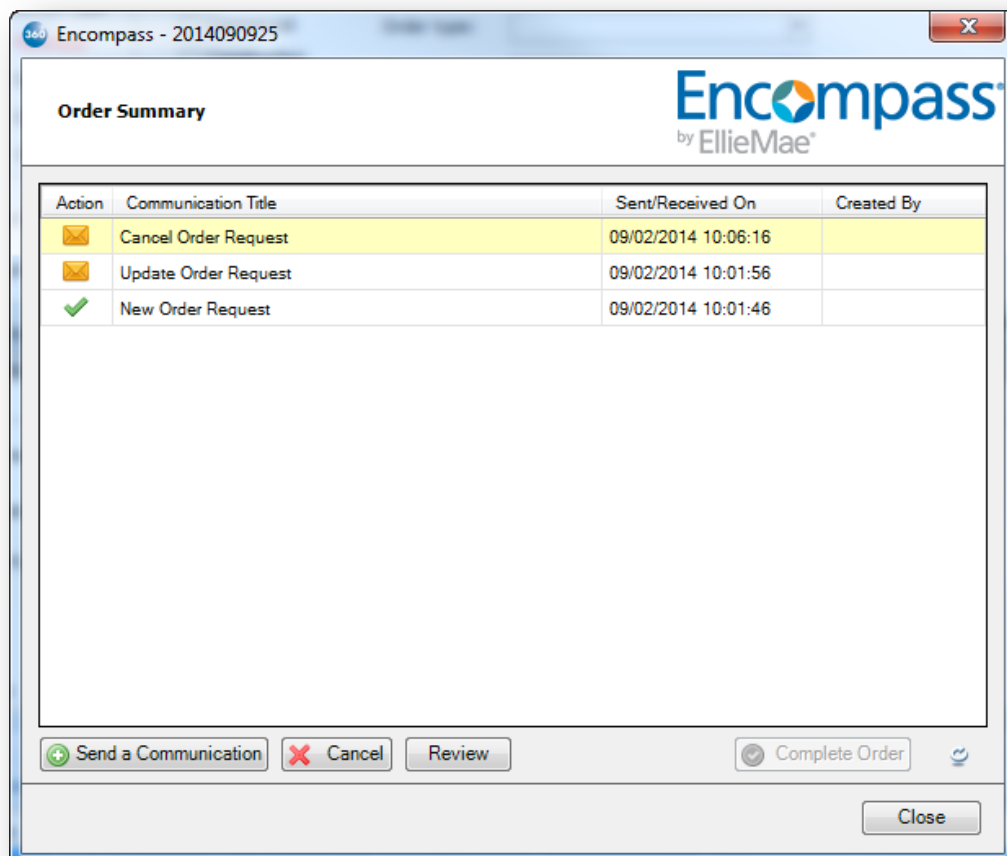
If the Encompass user cancels an order, an email notification of the update/cancellation will be sent to the SoftPro 360 user. The transaction will remain in a Ready status until the cancellation is accepted by the 360 user. To accept the cancellation, highlight the transaction and click the Next Step button in the 360 queue.



The screenshot shows a 'Queue' window with a toolbar at the top containing icons for 'Next Step', 'Views', and 'Filter'. The 'Views' dropdown is set to 'Active Order' and the 'Filter' is set to 'All Providers'. Below the toolbar is a table with the following data:

	Transaction Number	Provider	Service	Status	Linked Order	Linked Profile	Created By	Created On	Completed On	Description
✉	410060-10-140902-023966	Encompass	Exchange	Ready	2014090925	\\Default	Brandi Kearns	9/2/2014 10:01 AM		Kearns, Brandi, 1234 Test Borrower St, R

Highlight the Cancel Order Request communication and click Review.



The screenshot shows a window titled 'Encompass - 2014090925'. Inside, there is an 'Order Summary' section with the Encompass by EllieMae logo. Below the logo is a table with the following data:

Action	Communication Title	Sent/Received On	Created By
✉	Cancel Order Request	09/02/2014 10:06:16	
✉	Update Order Request	09/02/2014 10:01:56	
✓	New Order Request	09/02/2014 10:01:46	

At the bottom of the window, there are several buttons: 'Send a Communication' (with a plus icon), 'Cancel' (with a red X icon), 'Review' (highlighted), 'Complete Order' (with a checkmark icon), and 'Close'.

The review screen will be displayed; click the accept button to continue.

Review - 2014090925

Select All Select None Field Codes New Order Order Search Linked To: 2014090925

Groups Data

Name	Current Value	New Value
Transaction Type	Purchase	Purchase
Settlement Date	9/11/2014 12:00:00 AM	9/11/2014
Settlement Date Estimated?	True	True
Number	1409EM000073	1409EM000073
Type	FHA	FHA

Add to ProForm Notes

Name	Value
Title Office	Chicago Title - Encompass Integration

Accept Reject Close

After the Cancel Order Request is accepted, Order Summary screen will be displayed with a message that states "This order is in a cancelled state. No further communications can be sent."

Encompass - 2014080025

Order Summary

Encompass by EllieMae

Action	Communication Title	Sent/Received On	Created By
✓	Cancel Order Request	09/02/2014 11:51:30	
	Update Order Request	09/02/2014 10:34:58	
✓	New Order Request	09/02/2014 10:22:07	

Send a Communication Cancel Review Complete Order

This order is in a cancelled state. No further communications can be sent.

Close

**After each cancel option (whether by Encompass or the SoftPro 360 user) no further action can be done on the transaction.**

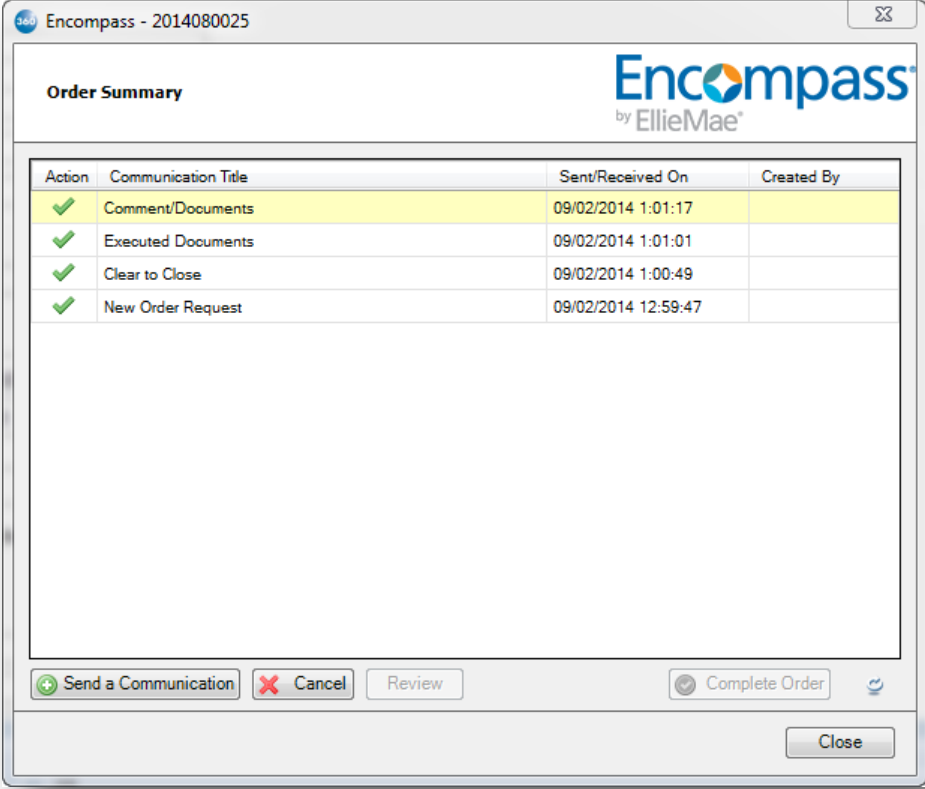
## Completing an Encompass transaction

To complete a transaction one of the following types of communication needs to be sent out before the Complete Order button will be activated.

Send Final Policy – Title orders

Send Final HUD for Review – Closing/Escrow orders

To send one of the above communications, find the order navigate to the Order Summary screen of the order to be complete and click Send Communication to continue.

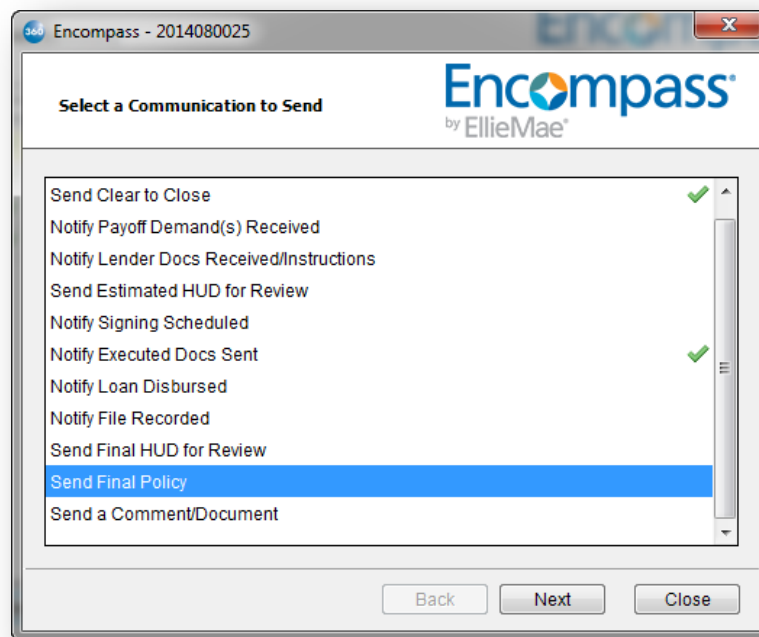


The screenshot shows the 'Order Summary' window in the Encompass software. The window title is 'Encompass - 2014080025'. The Encompass logo is in the top right. Below the title, there is a table with the following data:

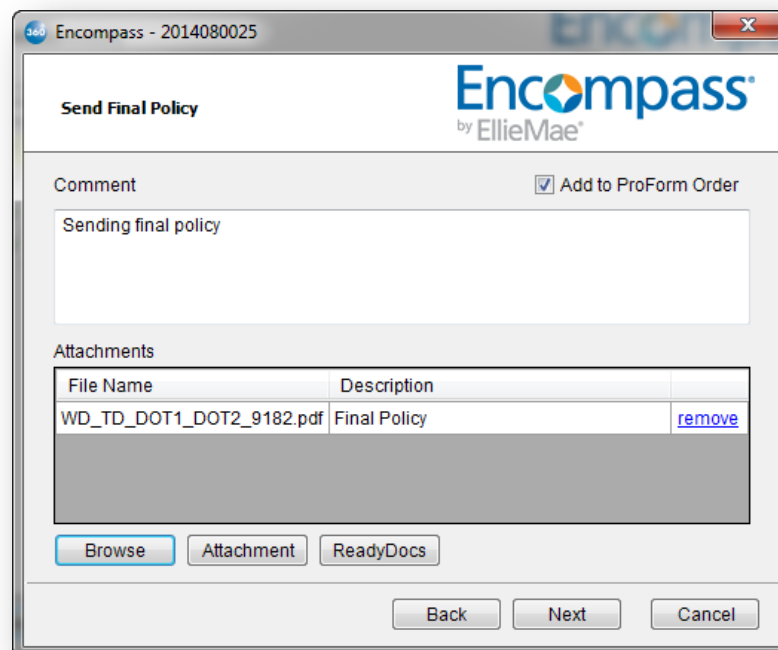
Action	Communication Title	Sent/Received On	Created By
✓	Comment/Documents	09/02/2014 1:01:17	
✓	Executed Documents	09/02/2014 1:01:01	
✓	Clear to Close	09/02/2014 1:00:49	
✓	New Order Request	09/02/2014 12:59:47	

Below the table, there are several buttons: 'Send a Communication' (with a plus icon), 'Cancel' (with a red X icon), 'Review', 'Complete Order' (with a checkmark icon), and 'Close'.

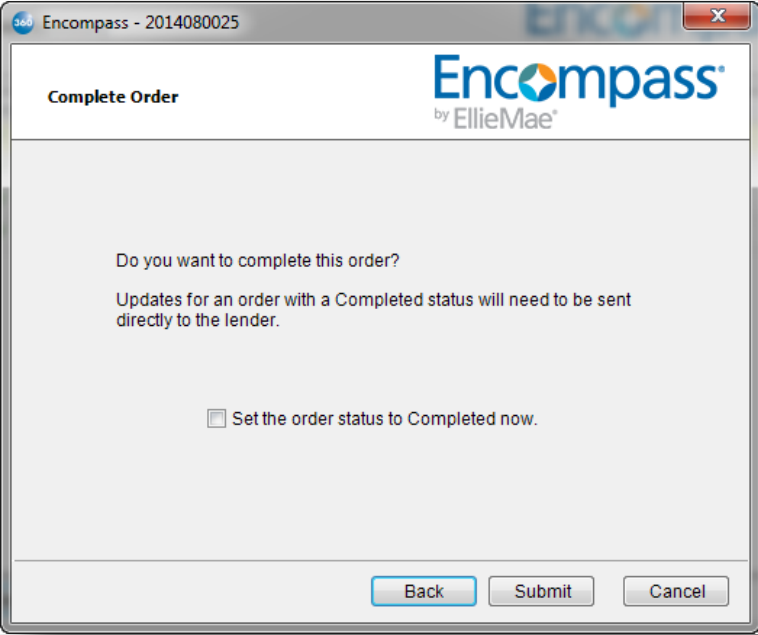
Select Send Final Policy for Title orders or Send Final HUD for Review for Closing/Escrow orders and click next to continue.



Enter a comment and/or attach a document and click next to continue.



To set the order to complete, check the Set the order status to Completed now and click submit.



The dialog box is titled "Encompass - 2014080025" and features the "Encompass by EllieMae" logo. The main heading is "Complete Order". The text inside asks, "Do you want to complete this order?" and provides a warning: "Updates for an order with a Completed status will need to be sent directly to the lender." Below this is a checkbox labeled "Set the order status to Completed now." At the bottom, there are three buttons: "Back", "Submit", and "Cancel".

Encompass - 2014080025

**Complete Order**

Encompass  
by EllieMae

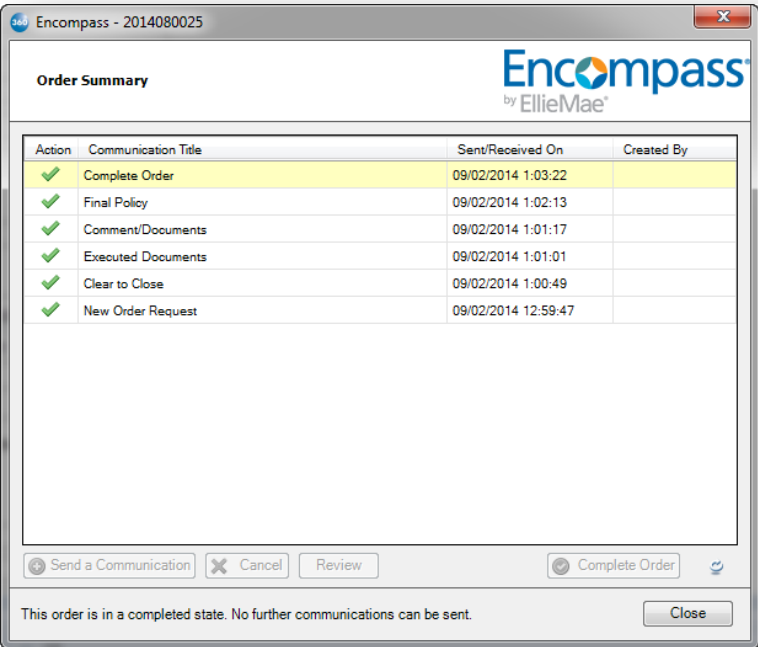
Do you want to complete this order?

Updates for an order with a Completed status will need to be sent directly to the lender.

☐ Set the order status to Completed now.

Back Submit Cancel

Once submit is clicked, the order will be set to complete and no additional communication can be sent.



The dialog box is titled "Encompass - 2014080025" and features the "Encompass by EllieMae" logo. The main heading is "Order Summary". It contains a table with the following data:

Action	Communication Title	Sent/Received On	Created By
✓	Complete Order	09/02/2014 1:03:22	
✓	Final Policy	09/02/2014 1:02:13	
✓	Comment/Documents	09/02/2014 1:01:17	
✓	Executed Documents	09/02/2014 1:01:01	
✓	Clear to Close	09/02/2014 1:00:49	
✓	New Order Request	09/02/2014 12:59:47	

Below the table, there are buttons for "Send a Communication", "Cancel", "Review", "Complete Order", and a refresh icon. At the bottom, a message states: "This order is in a completed state. No further communications can be sent." with a "Close" button.

Encompass - 2014080025

**Order Summary**

Encompass  
by EllieMae

Action	Communication Title	Sent/Received On	Created By
✓	Complete Order	09/02/2014 1:03:22	
✓	Final Policy	09/02/2014 1:02:13	
✓	Comment/Documents	09/02/2014 1:01:17	
✓	Executed Documents	09/02/2014 1:01:01	
✓	Clear to Close	09/02/2014 1:00:49	
✓	New Order Request	09/02/2014 12:59:47	

Send a Communication Cancel Review Complete Order

This order is in a completed state. No further communications can be sent.

Close

If the order does not need to be closed at this time, do not check the Set the order status to Completed now check box; click submit to continue. The Summary screen will be displayed and the Complete Order button will now be available so the order can be closed at a later time.

The screenshot shows a software window titled "Encompass - 2014080025". The window displays an "Order Summary" page with the "Encompass by EllieMae" logo in the top right. Below the logo is a table with the following data:

Action	Communication Title	Sent/Received On	Created By
✓	Final Policy	09/02/2014 3:44:03	
✓	New Order Request	09/02/2014 7:36:56	

Below the table, there are several buttons: "Send a Communication" (with a plus icon), "Cancel" (with a red X icon), "Review", "Complete Order" (with a green checkmark icon), and a "Close" button at the bottom right.