



# **Encompass Integration User Guide**

## **AFX Title Update**

10 February 2025

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# Encompass Integration User Guide

## AFX Title Update

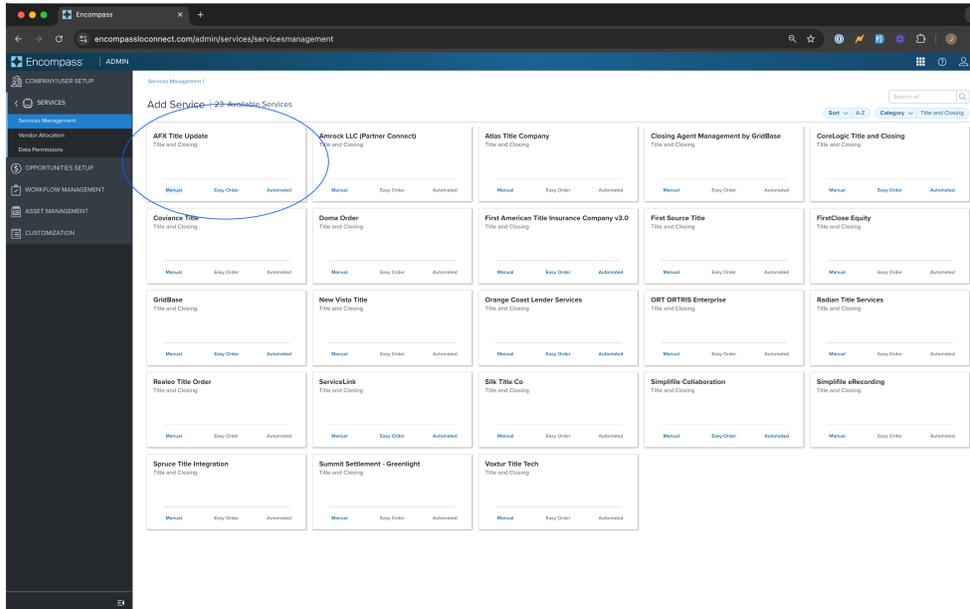
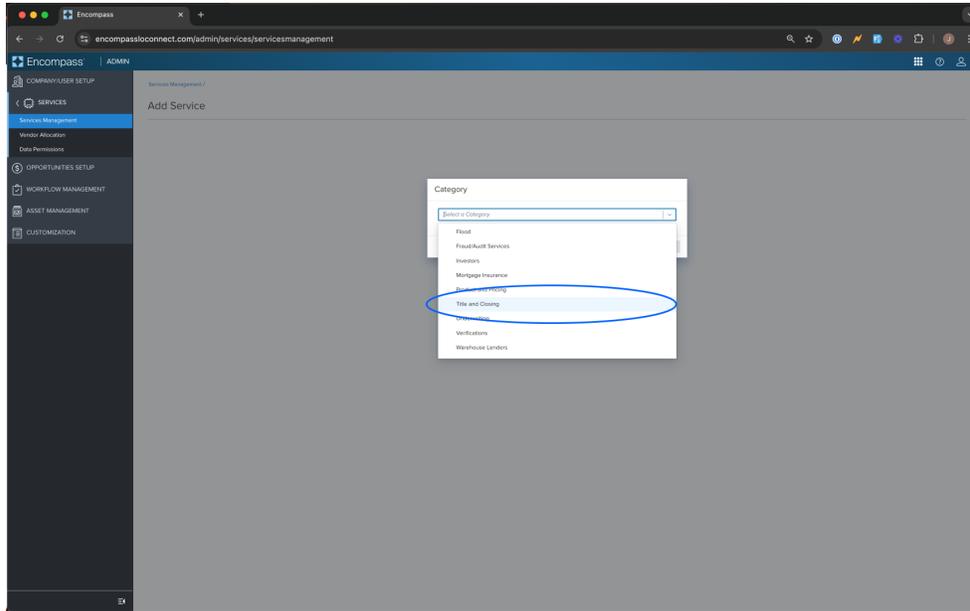
### 1. Overview

AFX Research has an integration with Encompass Web Application and Encompass Smart Client to process uninsured title updates. The purpose of this user guide is to explain:

- The configuration needed in the Encompass Admin Portal
  - Credentials
  - Interactive Ordering (Manual)
  - Automated Ordering (Easy Order)
- How to create an AFX Title Update Order.
- How to check on the status of an order and view the completed title report.

## 2. Encompass Admin Portal Configuration

In order to access AFX Title Update within the Encompass Application, certain configuration tasks must be accomplished e.g. adding Encompass Users for access, enabling AFX Title Update to show up in the Providers list, etc. The Encompass Admin Portal is where you can configure AFX Title Update Encompass Integration. AFX Title Update is available by clicking the “Add Service” in the Services Management screen, and selecting the category of “Title and Closing”, then click “Retrieve Products”. Then find “AFX Title Update” in the list of products and click manual to begin set up.



## 2.1. Interactive Ordering Manual Shared

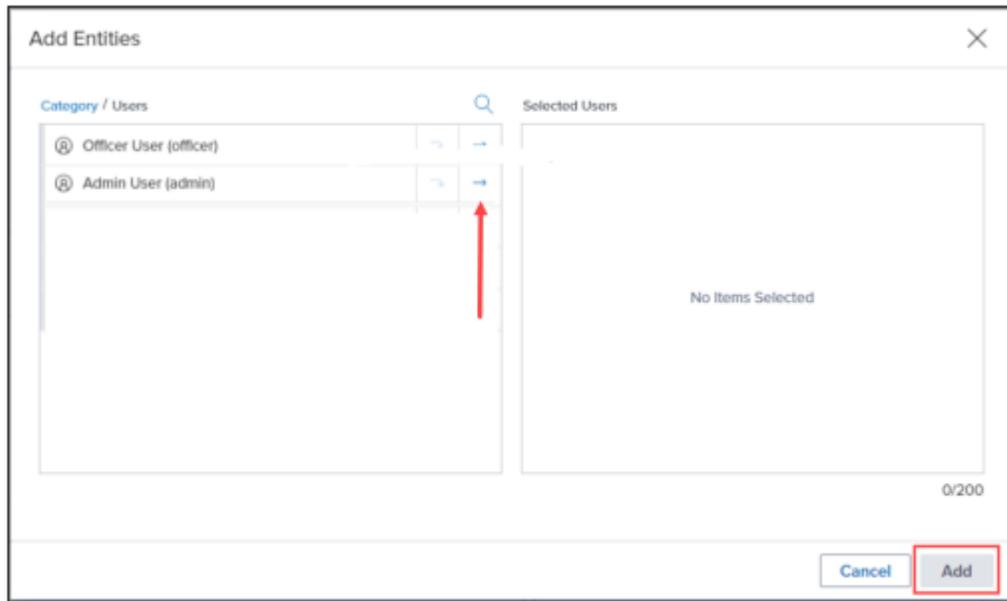
- Open Encompass Admin Portal either via the Encompass Desktop Application or the Internet Browser.
- Click on Company/User Setup
- Click on Services Management
- Click on the Add Service
- Find the “AFX Title Update” Card in the “Title and Closing” category and Click on Manual
- Add Authorized users for the integration and Save

The screenshot shows the 'Add Manual Setup' form. At the top, there are fields for 'Service Type' (Closing Fees), 'Production Level' (Loan Level), and 'Provider' (Consignor SmartFees (PFI)). Below these are input fields for 'Service Setup Name' and 'Service Setup Description'. There is a 'Readiness Conditions' section with radio buttons for 'Condition Builder' and 'Query Builder'. At the bottom, there is an 'Authorized Users' section with a table and an 'Add' button highlighted in red. The table has columns for 'ID', 'NAME', 'TYPE', and 'ACTION'. Below the table, it says 'No Results Found' and 'Total Items: 0'. There are 'Cancel' and 'Save' buttons at the bottom right.

Select the arrow adjacent to the **Users** option.

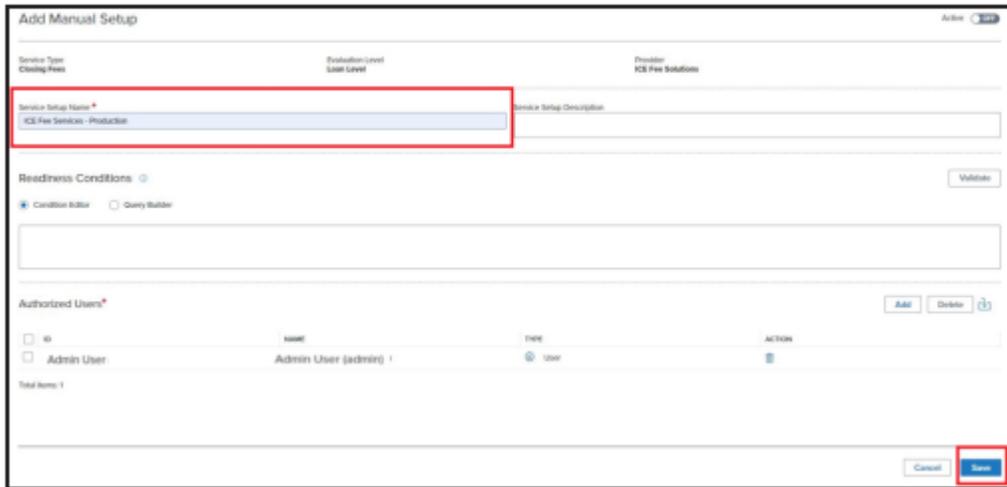
The screenshot shows the 'Add Entities' dialog box. On the left, there is a 'Category' list with three items: 'Organizations', 'Users', and 'Personas'. The 'Users' item is highlighted with a red box, and a red arrow points to the right-pointing arrow next to it. On the right, there is a 'Selected Users' area that is currently empty, displaying 'No Items Selected'. At the bottom right, there are 'Cancel' and 'Add' buttons. The dialog also shows '0/200' at the bottom right.

Select users



Click the **Add** button.

Type in the **Service Setup Name** and click **Save**.



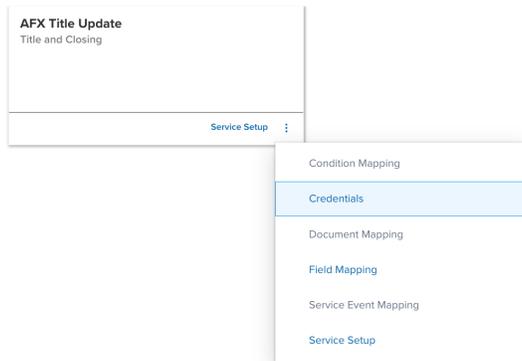
## 2.2. Credentials

Once the service setup is created the next task would be to add the credentials (the AFX API Token) that was provided from AFX Research into the Encompass Admin Portal. These credentials are verified by AFX when you open up the AFX Title Update form from within Encompass. There will be one set of credentials that will be shared among all the Encompass

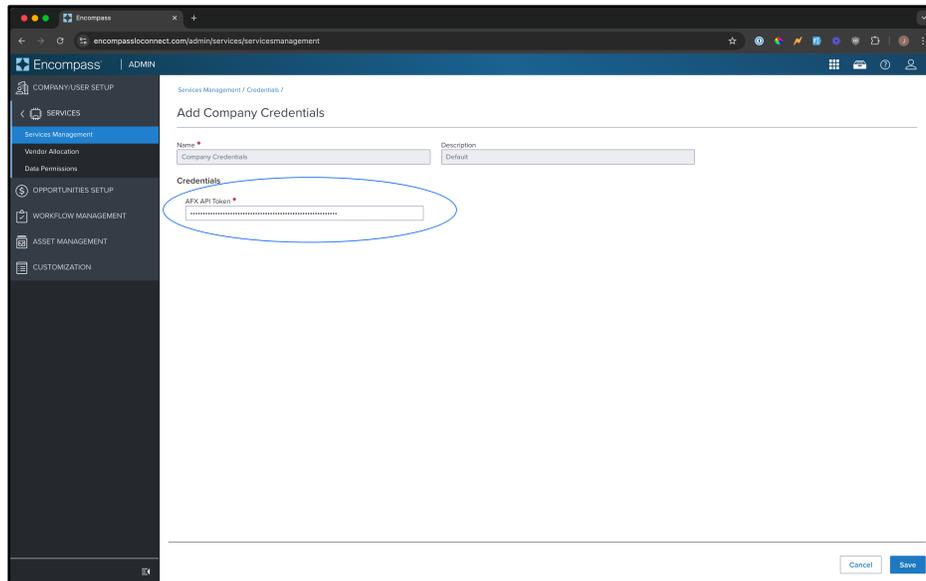
Users. On request, AFX Research can provide your unique AFX API Token that will be entered into Encompass. Do not share or make your AFX API Token public!

### 2.2.1. Entering Your AFX API Token Credential

- Open Encompass Admin Portal either via the Encompass Desktop Application or the Internet Browser.
- Click on Company/User Setup
- Click on Services Management
- Find the “AFX Title Update” Card and Click on the 3 dots to see a dropdown, click on “Credentials”



- Click on the Add button.
- Fill in the Name and Description fields. The values can be any verbiage you wish.
- Add the AFX API Token provided to you from AFX.

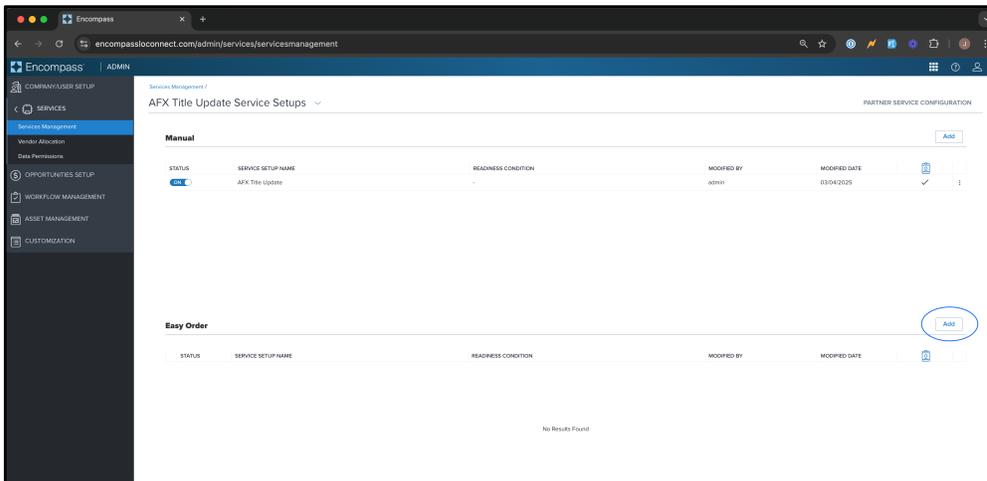


### 2.3. Automated Ordering (Easy Ordering)

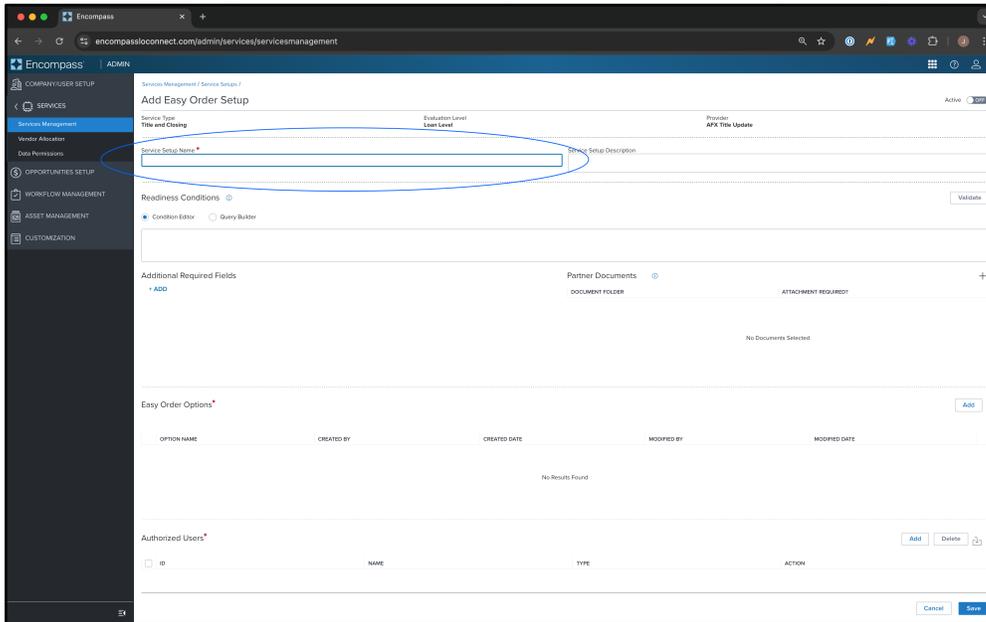
Encompass Desktop and Encompass Web Applications offer support for automatic service orders when a loan fulfills certain conditions. This is referred to as Automated Service Ordering. Any EPC integration can be configured by a lender administrator to submit automated orders. This powerful feature is designed to function as a pillar of the automated workflows in Encompass Web and Mobile, and to reduce the manual workload for lenders' personnel.

Once the need for an Automated Order configuration has been determined then follow the below steps.

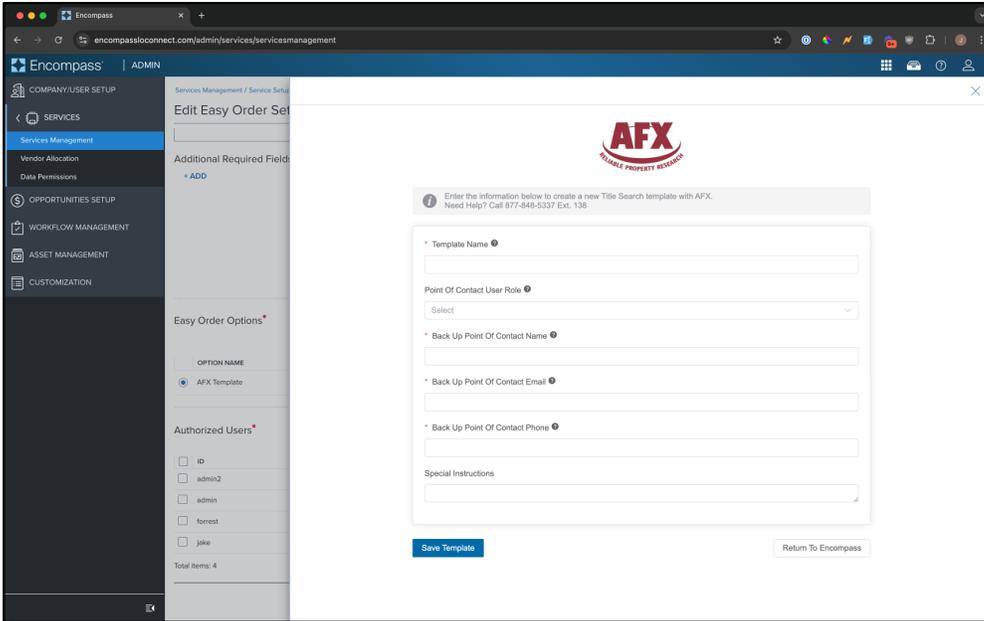
- Open Encompass Admin Portal either via the Encompass Desktop Application or the Internet Browser per Sections 2.1 The Internet Browser or 2.2 Encompass Desktop Application.
- Click on Company/User Setup
- Click on Services Management
- Find the “AFX Title Update” card
- Click on “Service Setup”
- Then to the right of “Easy Order” click the “Add” button



- On the next page type in the “Service Setup Name”, “Service Setup Description”



- Enter any “Readiness Conditions” that may apply to your process (this is optional).
- To the right of the “Easy Order Options” click the “Add” button
- This will slide out a form where you will need to provide the following fields:
  - Template Name (for your internal reference)
  - Point Of Contact User Role (select the user role on the loan that you want to be the point of contact with AFX for any communication regarding the automated order).
  - Back Up Point Of Contact Name, Email, and Phone fields (these will be passed along with any orders that are placed automatically to tell AFX who to contact in regards to those automated orders if no “Point of Contact User Role” is either selected in this template or that user role is not assigned on the loan).
  - Special Instructions (these are an specific instructions you want to provide AFX’s research team about these automated orders, this is an optional field).



- Make sure you select this newly added option before saving.
- Finally add the Authorized Users.
- Click the save button.
- Make sure the “Status” is toggled “ON”

You should now be able to use this “Easy Order” template within your “Workflow Management > Workflow Rules”.

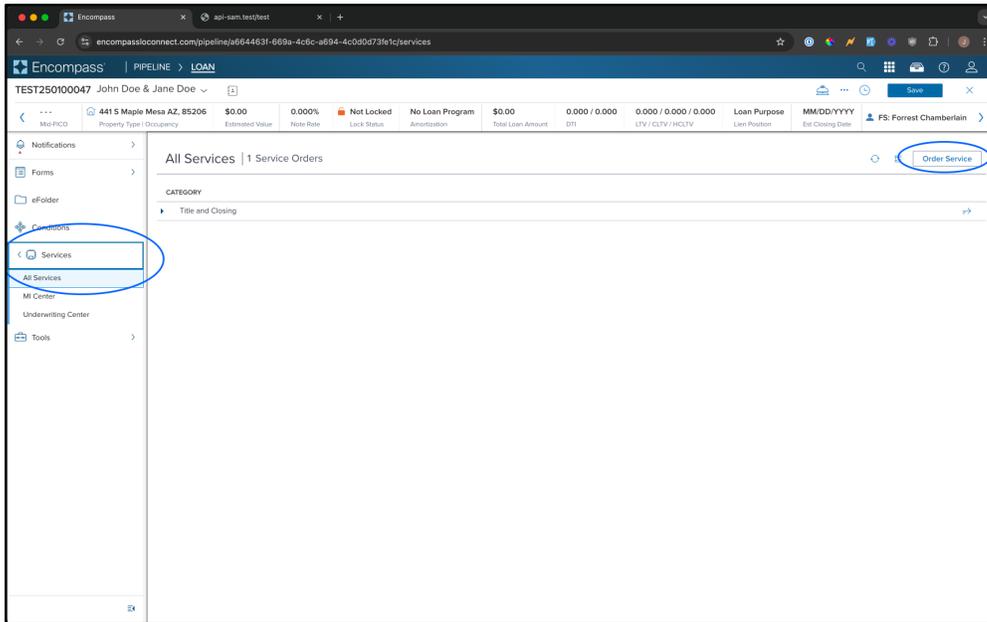
### 3. AFX Title Update Manual Ordering

Now that you have added the “AFX Title Update” service and added your AFX API Token and defined the Authorized Users, your authorized users will now be able to manually order 3.AFX Title Update on their loans in Encompass.

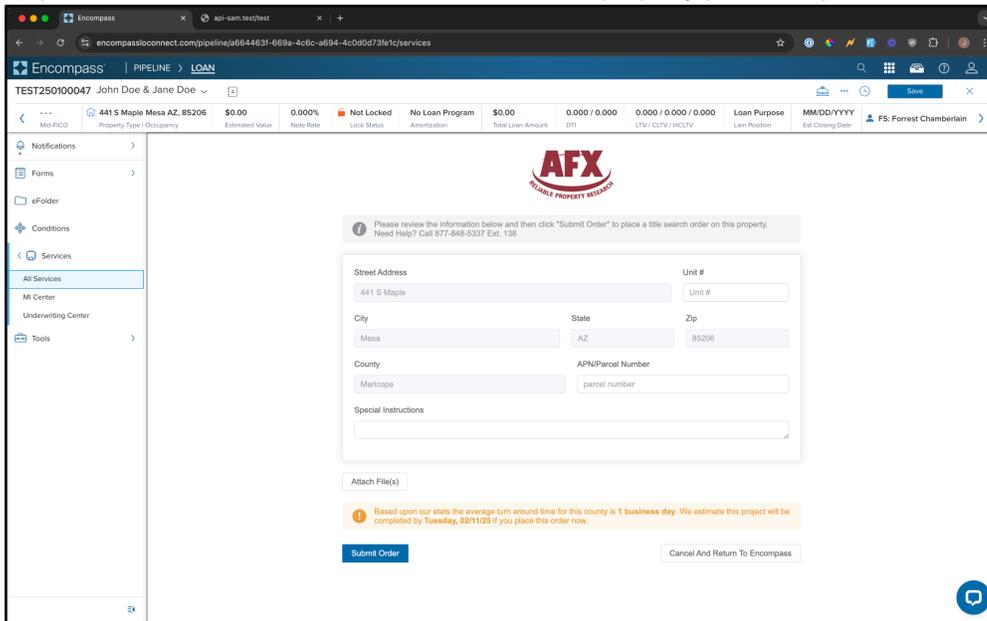
#### 3.1. Placing a New Order

- Open an existing loan within in Encompass
- Click on Services > All Services

- Click the “Order Service” button

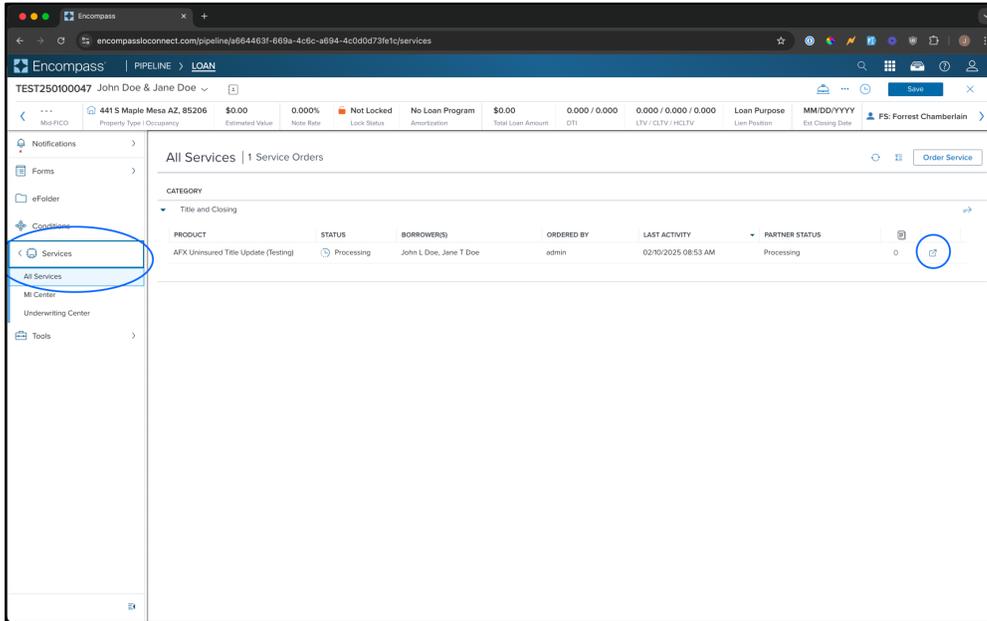


- Then select the Category of “Title and Closing”
- Then select the Provider of “AFX Title Update”
- And click the “Next” button
- This will take you to the AFX order form, where the property information from your loan will be prefilled into the form. You can edit the Unit #, APN/Parcel Number, Special Instructions, and attach any relevant files. This is the information that will be provided to AFX’s research team so provide as much relevant information about the property/parcel as possible.

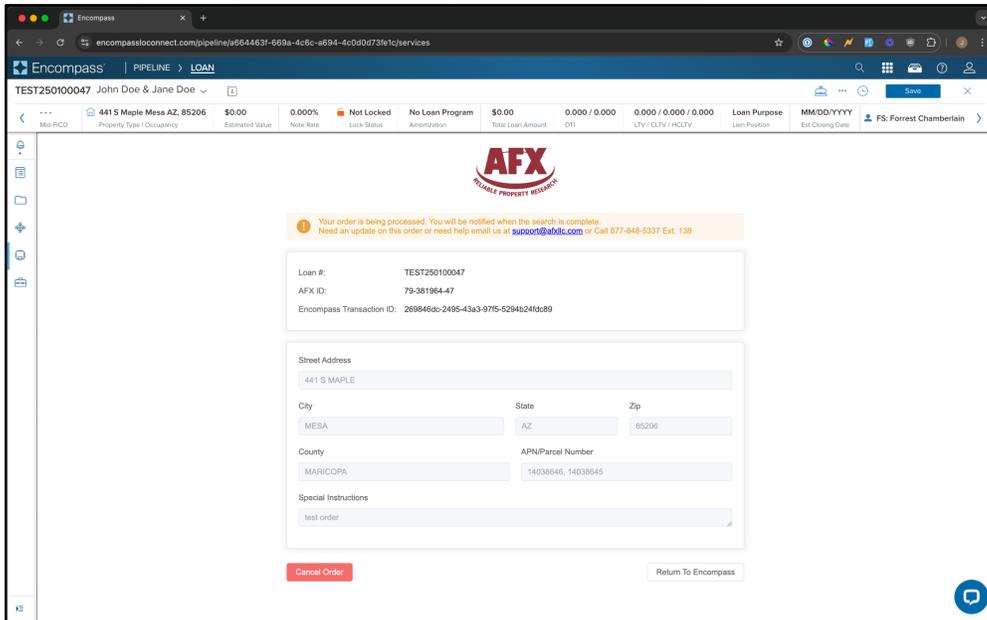


### 3.2. Reviewing the Status of Your Order(s)

- Open an existing loan within in Encompass
- Click on Services > All Services
- Click on the category of “Title and Closing”
- Then click on the external link icon to the right:



- From here you can view the status of your order.



### **3.3. Retrieving the Final Report File**

The rep who placed the order will be notified via email from AFX when their order is complete. The final report PDF file will automatically be delivered to the Loan eFolder in Encompass. Encompass will automatically create a new folder of “Title Report” when the order is placed. Then when AFX completes the order that completed final report PDF will be located within that folder.