# LOANNEX ENCOMPASS INTEGRATION

## LO Connect Integration Setup Guide

### Contents




JANUARY 22, 2024



LoanNEX
16 North Central Avenue, Saint Louis, MO 63105

# LoanNEX Support Information

## Support Case Submission Process

1. Select the appropriate email address below:
    a. Client Support / Configuration Settings: support@loannex.com
    b. Eligibility & Pricing Inquiries: investorsupport@loannex.com
    c. LO Connect Integration Team Email: integrations@loannex.com
2. Include Contact Information:
    a. First and Last Name
    b. Company Name
    c. Email
    d. Telephone
3. Include a detailed description of your Case
4. A Case will be created, and the appropriate LoanNEX Team member notified
5. LoanNEX will respond within one business day to address your Case

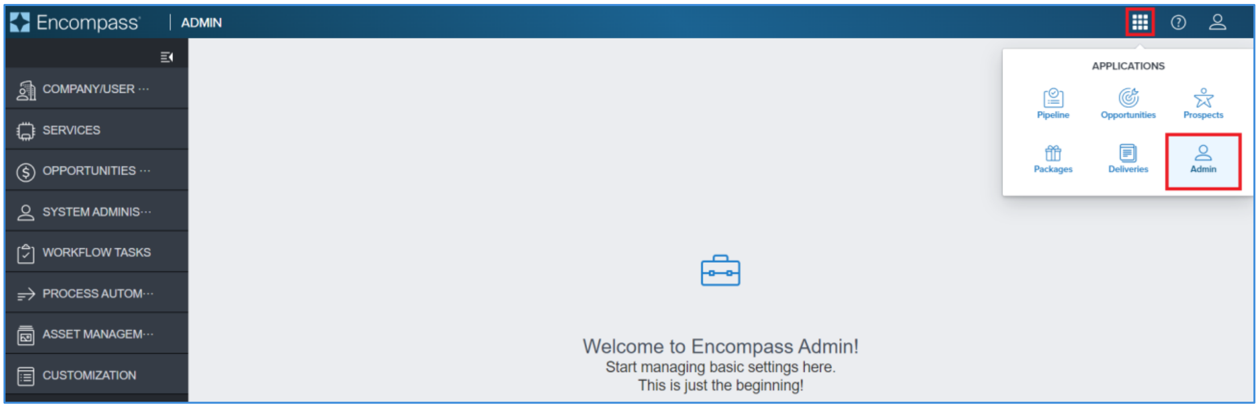
## Sales and General Inquiries Contact Information

- Main Phone: (314) 833-6464
- Sales Email: sales@loannex.com
    - Product demonstrations
    - Additional service requests
- General Inquiries Email: info@loannex.com
- Billing Inquiries Email: support@loannex.com

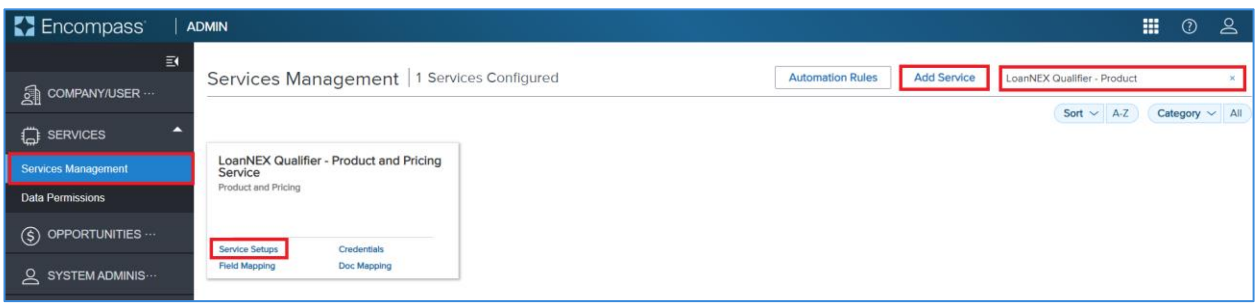
# Ellie Mae Partner Connect (EPC) Integration and User Setup

## Add LO Connect Provider / Enable Integration

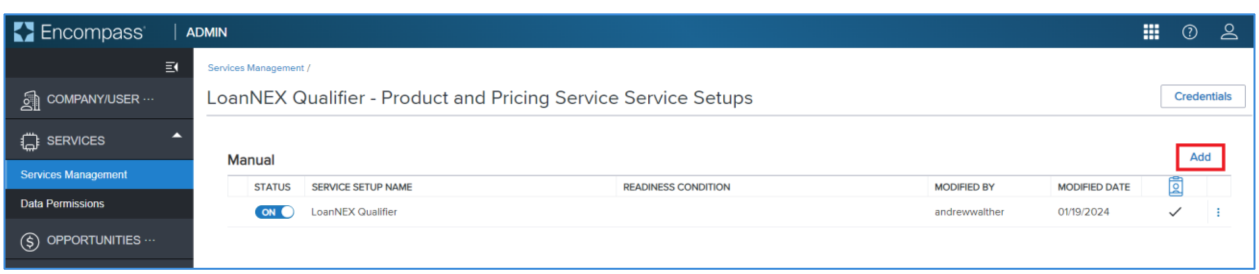
1. Login to Encompass LO Connect (encompassloconnect.com/admin)



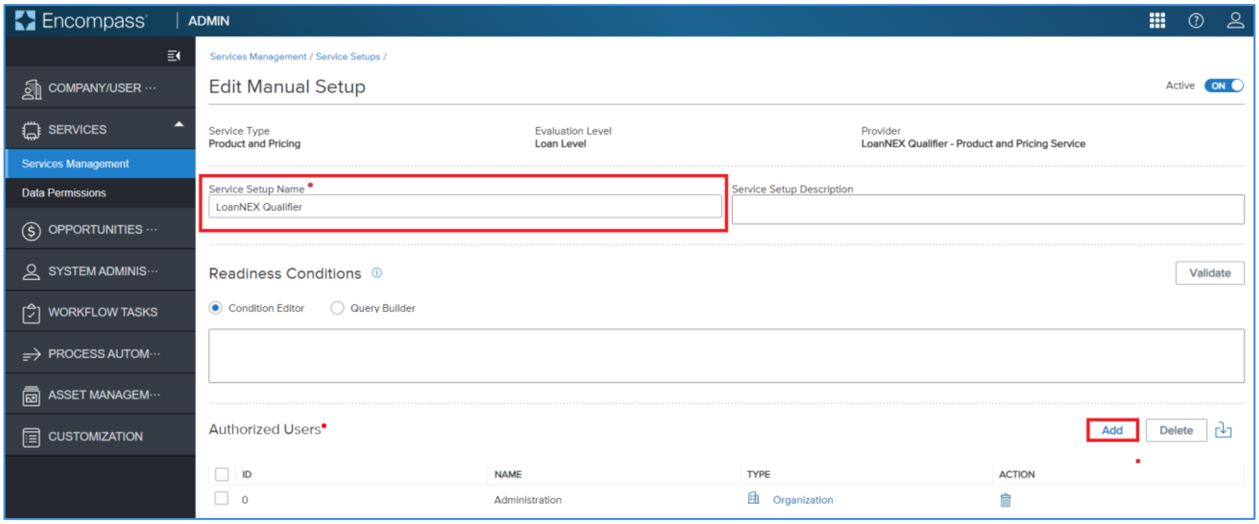

2. Navigate to the **Admin** section from the main screen



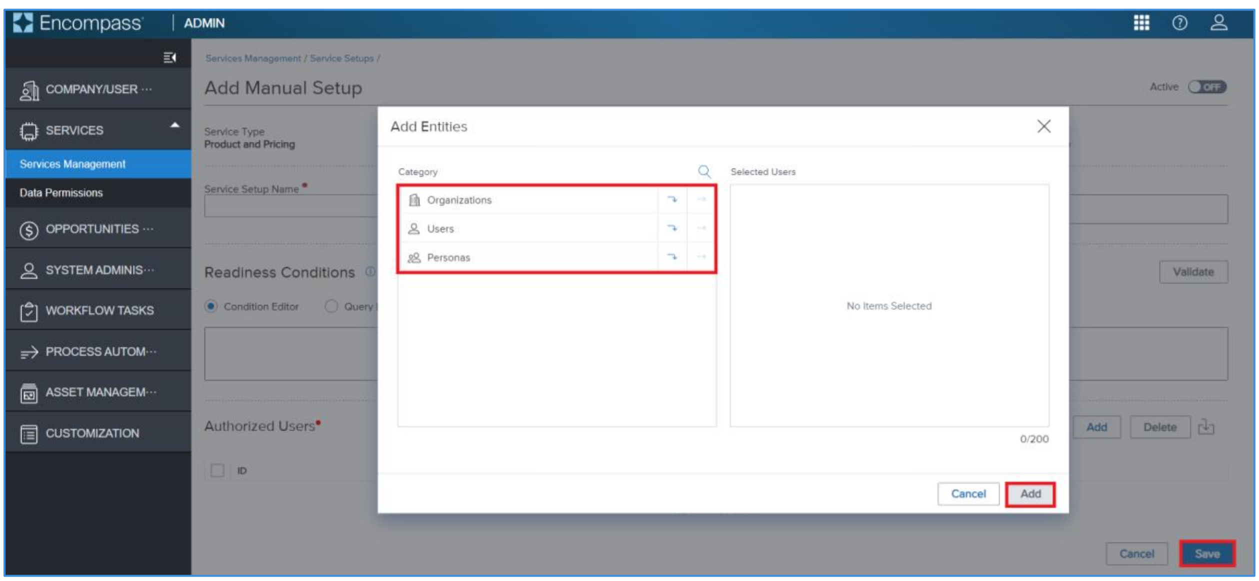

3. Select **Services Management** on the left menu bar
4. Select **Add Service** button
    a. Search for: **LoanNEX Qualifier - Product and Pricing Service**
5. Select **Service Setups**




6. Select **Add** button

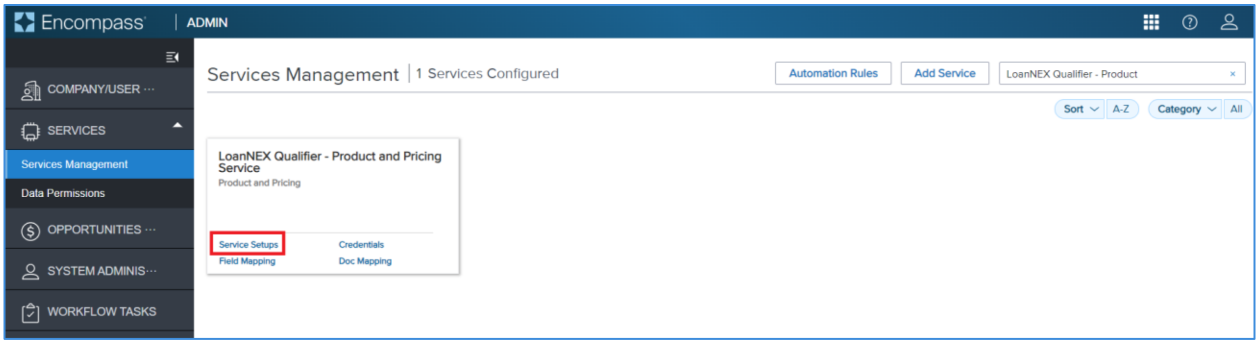



7. Edit **Service Setup Name** for the Product and Pricing Service
8. Select the **Add** button to update Authorized Users:

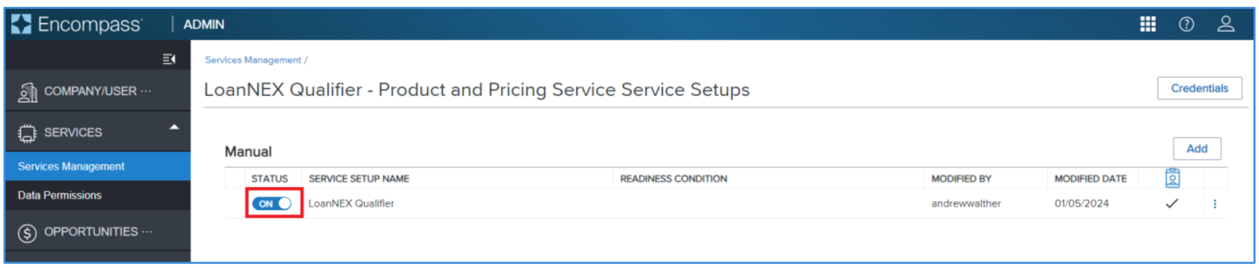



i. Select Organizations, Users and/or Personas that are allowed to access LoanNEX
ii. Click the **Add** button
iii. Repeat until Authorized Users complete

b. Select the **Save** button



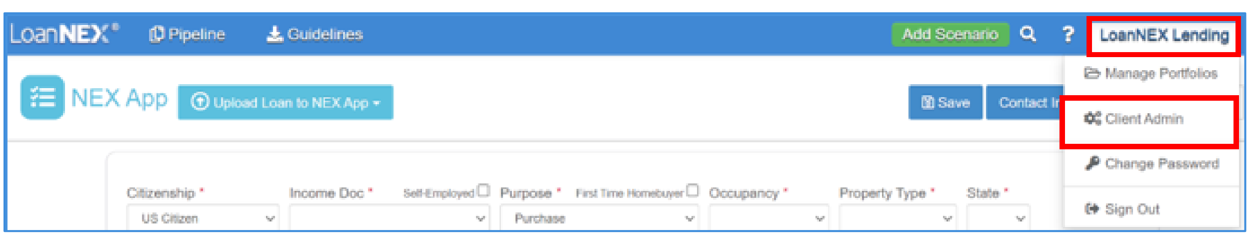

9. The new Provider, LoanNEX Qualifier - Product and Pricing Service, displays as a card on the Services Management page
   a. Select **Service Setups**



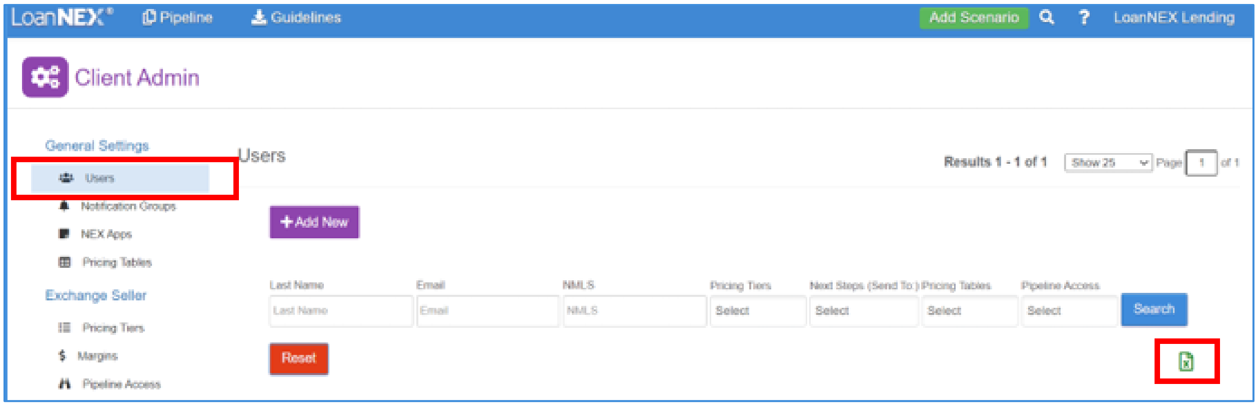

   b. Select the **Status** radio button to turn "On" the integration

## Create Encompass / LoanNEX Users

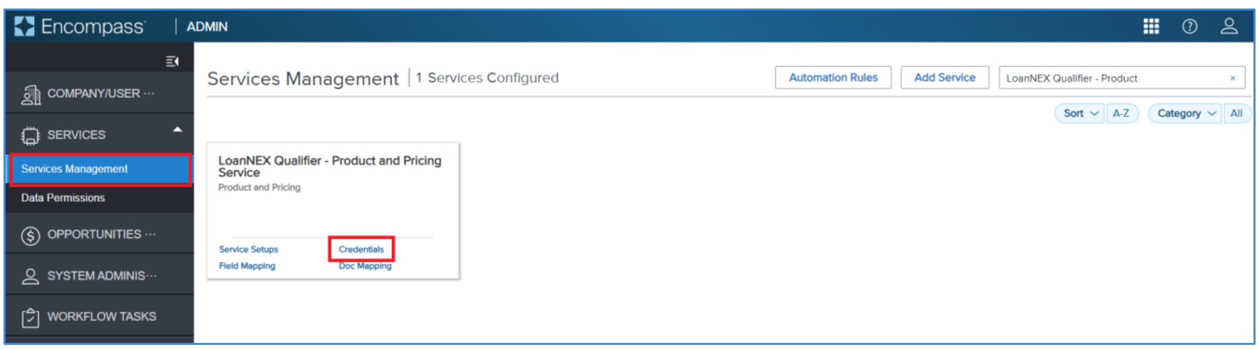
1. Login to LoanNEX at [https://web.loannex.com/](https://web.loannex.com/)



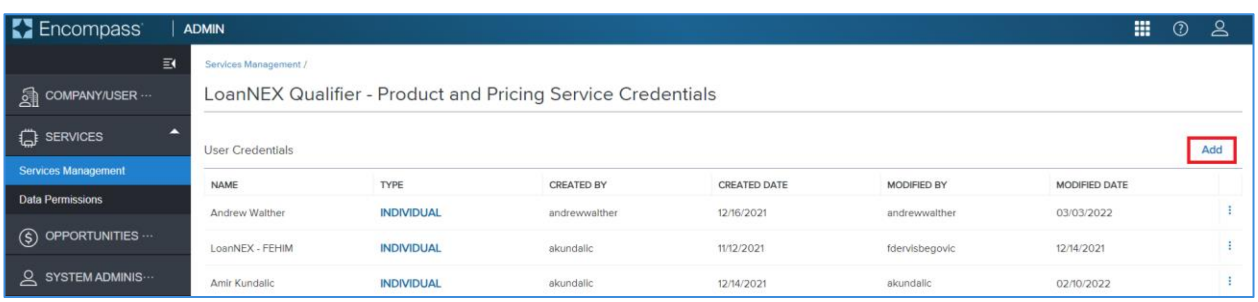

2. Click your Company Name in the upper right of the screen
3. Select **Client Admin**



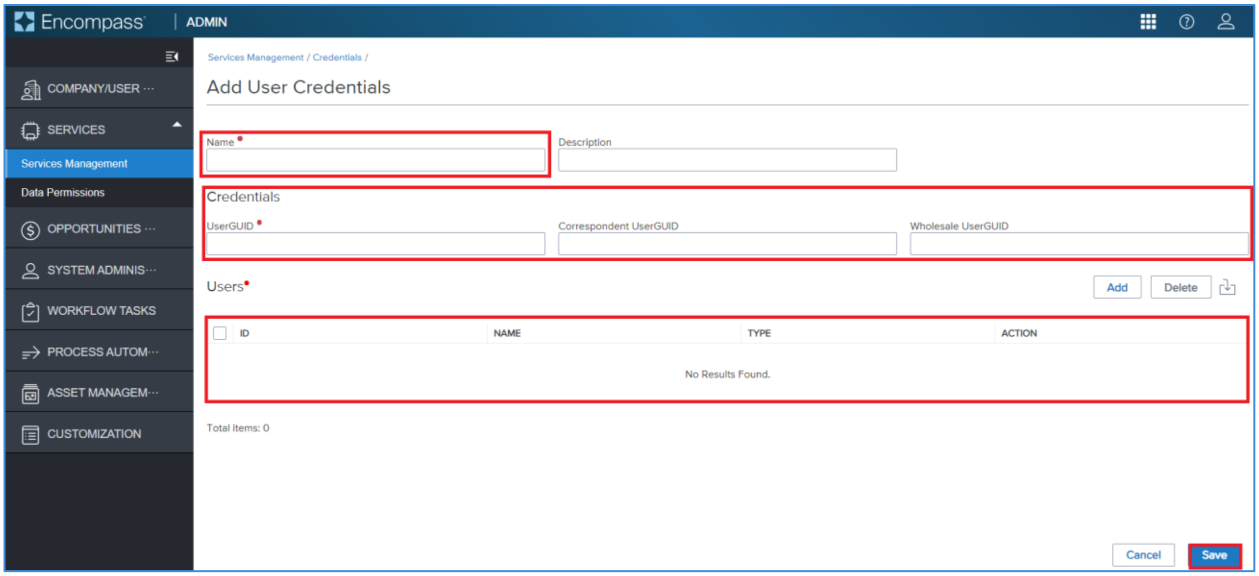

4. The Client Admin section of LoanNEX will open to the **Users** page
5. Select the **excel icon** to export your Company's User list
6. The User list export will show a UserGUID (Column AL) for each User
    a. You will need this UserGUID to create the Encompass User in following steps
7. Login to Encompass LO Connect at https://encompassloconnect.com/login and navigate to the **Admin** section




8. Select **Services Management**
9. Find **LoanNEX Qualifier - Product and Pricing Service** and select **Credentials**



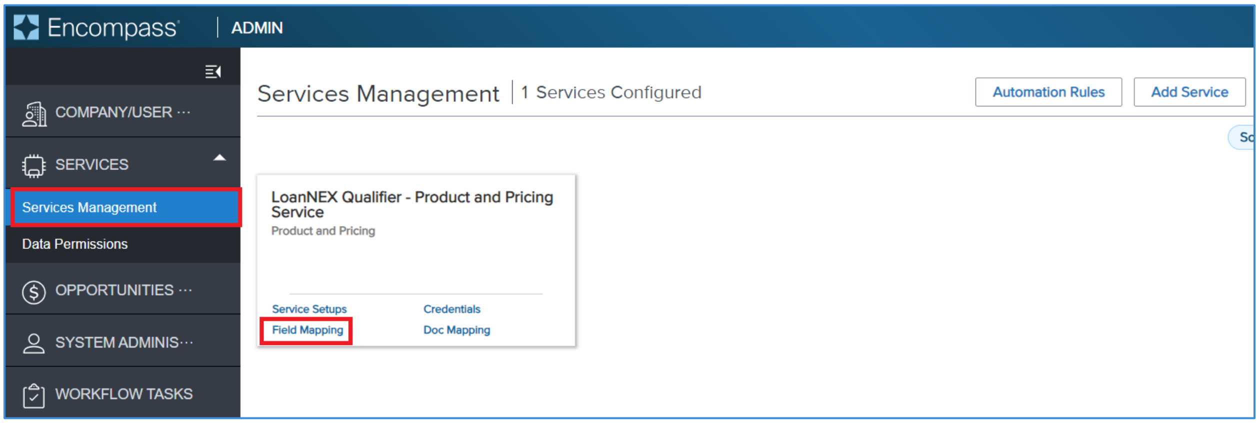

10. Select the **Add** button



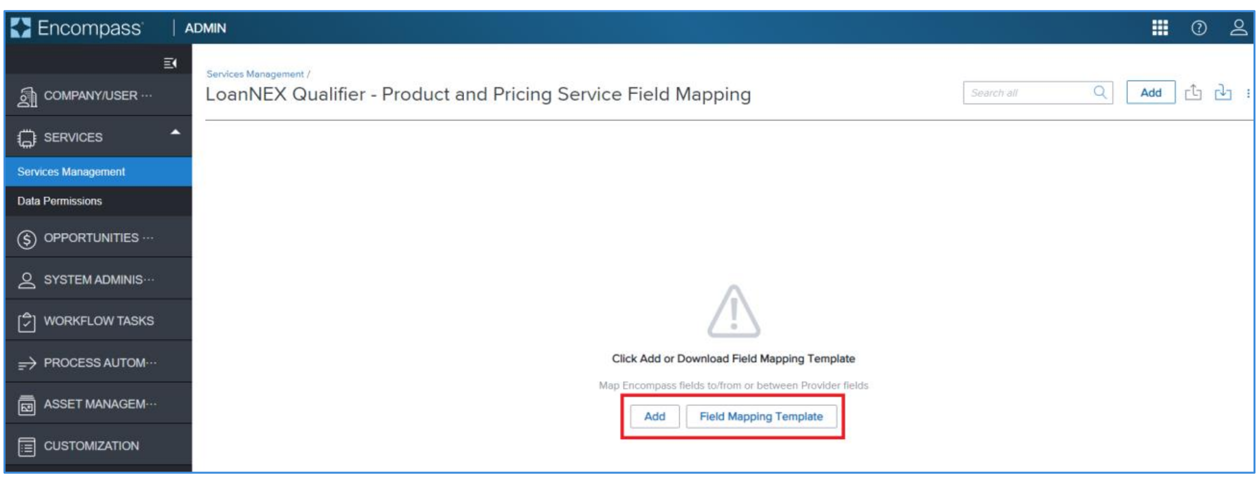

11. Enter the User Credential Information
    a. Enter the User's **Name**
    b. Enter **UserGUID**
        i. If User has access to **<u>one</u>** LoanNEX Account, enter the LoanNEX UserGUID in the first UserGUID field
            1. **<u>If the one account the User has access to is either Correspondent or Wholesale</u>**, also enter the same UserGUID in the appropriate field (either Correspondent UserGUID or Wholesale UserGUID)
        ii. If the User has access to **<u>more than one</u>** LoanNEX Account, by channel:
            1. Lock Desk with Retail Access – enter the Retail UserGUID in the default UserGUID field
            2. Correspondent or Wholesale User – enter either Correspondent or Wholesale UserGUID into the default UserGUID field
    c. Enter **Correspondent UserGUID** if applicable
        i. Enter LoanNEX UserGUID associated with the Correspondent LoanNEX Account, even if the Correspondent UserGUID was utilized in *default* field
        ii. If User should not have access to a Correspondent LoanNEX Account in Encompass, leave blank
    d. Enter **Wholesale UserGUID** if applicable
        i. Enter LoanNEX UserGUID associated with the Wholesale LoanNEX Account, even if the Wholesale UserGUID was utilized in *default* field
        ii. If User should not have access to a Wholesale LoanNEX Account in Encompass, leave blank
    e. Select **User** from list
12. Click the **Save** button
13. Repeat steps 13 and 14 above until all Users have been added

## EPC Custom Field Mapping to/from LoanNEX

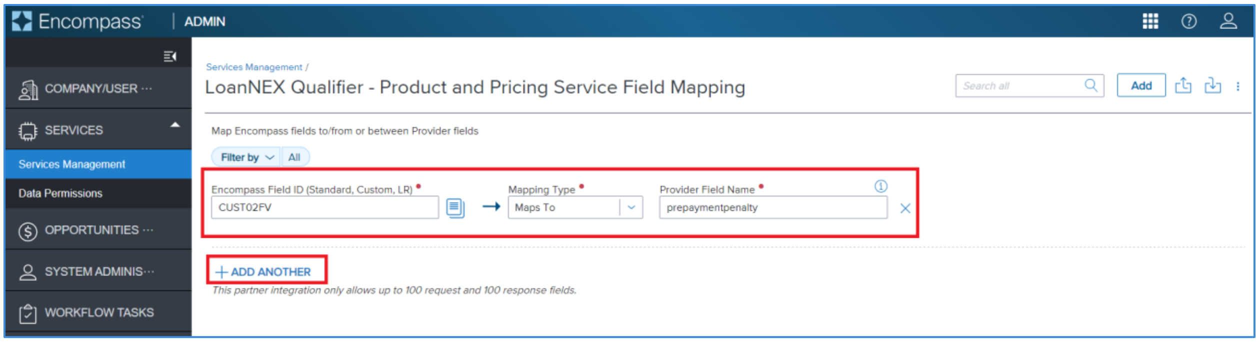
1. Login to Encompass LO Connect (encompassloconnect.com/admin)
2. Select the **Admin** tab on the menu at the top of the screen




3. Select **Services Management** on the left menu bar
4. Find LoanNEX Qualifier – Product and Pricing
   a. Select **Field Mapping**




5. Click **Add** to add an individual mapping option, or click **Field Mapping Template** to download excel template and create multiple mappings
   a. *LoanNEX recommends starting with one field mapping to ensure you are yielding the appropriate results before adding additional field mappings*




6. Add field values for custom mapping
    a. **Encompass Field ID (Standard, Custom, LR)**
    b. **Mapping Type**
    c. **Provider Field Name**
7. Select **Add Another** as needed, or go back to the Field Mapping page to download an excel template and create multiple mappings