

LOANNEX ENCOMPASS INTEGRATION

LO Connect Integration Setup Guide

Contents

LoanNEX Support Information	1
Support Case Submission Process	1
Sales and General Inquiries Contact Information	1
Ellie Mae Partner Connect (EPC) Integration and User Setup	2
Add LO Connect Provider / Enable Integration	2
Create Encompass / LoanNEX Users	4
LoanNEX Custom Field Mapping to/from EPC and LoanNEX	7
EPC Custom Field Mapping to/from LoanNEX	7
EPC Retail PDF eFolder Custom Mapping Rules	8
Customize NEXApp Field Option Naming Convention in LoanNEX	9



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: <u>sales@loannex.com</u>
 - Product demonstrations
 - Additional service requests
- General Inquiries Email: info@loannex.com
- Billing Inquiries Email: <u>support@loannex.com</u>



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

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A COMPANY/USER	E1	Services Management 1 Services Configured	Automation Rules Add Service	LoanNEX Qualifier - Product		×
	•			Sort ~ A-Z	Category	V All
Services Management		LoanNEX Qualifier - Product and Pricing Service Product and Pricing				
		Service Setups Credentials Field Mapping Doc Mapping				

- 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

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Data Permissions		LoanNEX Qualifier		andrewwalther	01/19/2024	~		
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6. Select Add button

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Services	Service Type Product and Pricing	Evaluation Level Loan Level	Provide LoanNE	r X Qualifier - Product and Pricing Service			
Data Permissions	Service Setup Name		Service Setup Description				
S OPPORTUNITIES ···							
	Readiness Conditions ①				[Valid	ate
WORKFLOW TASKS	Condition Editor Query Builder						
	Authorized Users*			Add	Dele	ete	Ъ

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

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ASSET MANAGEM····						
	Authorized Users [®]				0/200	Add Delete
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					Calcer	
						Cancel

- 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

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	Services Management 1 Services Configured	Automation Rules Add Service LoanNEX Qualifier - Product *
		Sort V AZ Category V All
Services Management	LoanNEX Qualifier - Product and Pricing Service	
Data Permissions	Product and Pricing	
S OPPORTUNITIES ···	Service Setups Credentials	
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WORKFLOW TASKS		

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

Encompass	14	ADMIN								
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SERVICES		Manual				ſ	Add			
Services Management		STATUS SERVICE SETUP NAME	READINESS CONDITION	MODIFIED BY	MODIFIED DATE		1			
Data Permissions		LoanNEX Qualifier		andrewwalther	01/05/2024	~				
S OPPORTUNITIES ···										

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

Create Encompass / LoanNEX Users

1. Login to LoanNEX at https://web.loannex.com/

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										-	1	😂 Manage Portfolios
REA NEX	App 🕤 Uplo	ad Los	in to NEX App +						D Save	Contact	11	0° Client Admin
ſ												P Change Password
	Citizenship *		Income Doc *	Self-Employed	Purpose *	First Time Homebuyer	Occupancy *	Prop	erty Type * Sta	ste *		
	US Citizen	×		*	Purchase	×		~	~	~		te Sign Out

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

OGNNEX® © Pipeline	🛓 Guidelines					Add Scena	no Q ?	LoanNEX Lending
😂 Client Admin								
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di Users	00010					Porsuits 1	-1 of 1 Show	Page 1 of 1
Notification Groups	In the second second							
NEX Apps	+ Add New							
Pricing Tables								
Exchange Seller	Lest Name	Email	NMLS	Pricing Tiers	Next Steps (Ser	ed To) Pricing Tables	Pipeline Access	
	Last Norma	Email	NMUS	Select	Select	Select	Select	Search
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A Pipeline Access								

- 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

Encompass	A	admin 🗰 🗇 🗧	
0	E1	Services Management 1 Services Configured Automation Rules Add Service LoanNEX Qualifier - Product	
COMPANY/USER ···		Sort V A-Z Category V	
Services Management		LoanNEX Qualifier - Product and Pricing	
Data Permissions		Product and Pricing	
S OPPORTUNITIES ····		Service Setups Credentials	
		Field Mapping Doc Mapping	
C WORKFLOW TASKS			

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

Encompass	ADMIN						0 L					
El	Services Management /											
COMPANY/USER ···	LoanNEX Qualifi	anNEX Qualifier - Product and Pricing Service Credentials										
	User Credentials						Add					
Services Management	NAME	TYPE	CREATED BY	CREATED DATE	MODIFIED BY	MODIFIED DATE						
Data Permissions	Andrew Walther	INDIVIDUAL	andrewwalther	12/16/2021	andrewwalther	03/03/2022	1					
	LoanNEX - FEHIM	INDIVIDUAL	akundalic	11/12/2021	fdervisbegovic	12/14/2021	L					
	Amir Kundalic	INDIVIDUAL	akundalic	12/14/2021	akundalic	02/10/2022	E					

10. Select the Add button



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EI	Services Management / Credentials / Add User Credentials					
Services Management	Name *	scription				
	Credentials UserGUID * Cor	rrespondent UserGUID	Wholesale UserGUID			
SYSTEM ADMINIS	Users*			Add D	elete	è
	D ID NAME	TYPE No Results Found.	ACTION			
	Total items: 0					
				Cancel	Sa	ave

- 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
 - If the one account the User has access to is either Correspondent or Wholesale, also enter the same UserGUID in the appropriate field (either Correspondent UserGUID or Wholesale UserGUID)
 - ii. If the User has access to more than one 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



LoanNEX Custom Field Mapping to/from EPC and LoanNEX

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

Encompass 🛛 🗎 🗚	DMIN
EI	Services Management / LoanNEX Qualifier - Product and Pricing Service Field Mapping
💭 SERVICES 🔶	
Services Management	
Data Permissions	
	A
() WORKFLOW TASKS	
PROCESS AUTOM····	Click Add or Download Field Mapping Template
	Map Encompass fields to/from or between Provider fields Add Field Mapping Template

- 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

Encompass	ADMIN			0	2
EI COMPANY/USER ···	Services Management / LoanNEX Qualifier - Product and Pricing Service Field Mapping	Search all	Add	ر ¹	rÅ1 :
	Map Encompass fields to from or between Provider fields				
Services Management	Filter by V All				
Data Permissions	Encompass Field ID (Standard, Custom, LR) Mapping Type Provider Field Name				
	+ ADD ANOTHER This partner internation only allows up to 100 request and 100 response fields				
WORKFLOW TASKS					

- 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

EPC Retail PDF eFolder Custom Mapping Rules

Notes:

- PDFs will be mapped to the **Product and Pricing** efolder if custom no mapping rules are set
- PDFs available to custom map to an efolder in EPC:
 - LoanNEX PPE Snapshot (Record of Business (ROB))
 - LoanNEX Lock Confirmation (Lock Ticket)
- TPOC Integration Accounts: EPC Retail Mapping will NOT impact TPOC Mapping
 - 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 Document Mapping

Encompass ADMIN								
COMPANY/USER SETUP	Services Management /							
<	LoanNEX Qualifier - DEMO Document Mapping $\sim \mid$ 2 Documents Mapped							
Services Management	Inbound (From Provider to Encompass)							
Vendor Allocation	Please Note: By default, all document types go into the Product and Pricing document folder unless otherwise specified here.							
Data Permissions	Document Types • eFolder Document Folder •							
S OPPORTUNITIES SETUP	LoanNEX Lock Confirmation \checkmark \rightarrow Lock Confirmation \checkmark							
	LoanNEX PPE Snapshot \checkmark \rightarrow LoanNex Files \checkmark	×						
	+ ADD ANOTHER							

Screenshot shows successful mapping of both PDFs

- 5. Click Add
- 6. Select the Document Type
 - a. LoanNEX PPE Snapshot = Record of Business (ROB)
 - b. LoanNEX Lock Confirmation = Lock Ticket
- 7. Select the **eFolder Document Folder** (this will override saving the PDFs in the Product and Pricing folder)
- 8. Select Add Another as needed. You can map the following LoanNEX PDFs
 - a. LoanNEX PPE Snapshot (Record of Business (ROB))
 - b. LoanNEX Lock Confirmation (Lock Ticket)



Customize NEXApp Field Option Naming Convention in LoanNEX

1. Login to LoanNEX at https://web.loannex.com/

Loan NEX ®	🔮 Pipeline 🛛 😅 Collabo		B Reports	🛓 Guidelines				Add Scenario Q	2 LoanNEX Lending
Loan NEX NEX App	Upload Loan to NEX App -							D Save Co	 ➡ Manage Credit Screens ➡ Manage Regions ➡ Manage Pricing ➡ Manage Portfolios
	Citizenship *	Income Doc * Self-Employ	red Purpose *	vst Time Homebuyer	ancy Property Typ	e * State * County *	Rural Property		😂 Client Admin
	Appraised Value *	Purchase Price * 1	Purchase Loan Amount *	Loan-to-Value	Second Lien	FICO* No FICO	v		Resource Center
	s] [3	5	<u></u>	5		100707.040		P Change Password
	Bankruptcy*	Foreclosure * Deed-i None ¥ None	n-Lieu* Sh	ort Sale * Mortga Ione • 0X30	ge Lates * DTI * (12 ¥ %	Months Reserves	Escrows *		🕪 Sign Out

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



4. Scroll down and select **Field Name Mapping**, under Encompass Settings, on the left menu panel

ompass Mapping									🖨 Save
compass Fields	0	Purpose	+	Bankruptcy	+	Foreclosure	+	Deed-in-Lieu	+
Short Sale	+	Mortgage Lates	+	Bankruptcy Type	+	Payment Penalty	0	Condo Type	+
0.0000000	+	Property Type	+	Citizenship	+	Escrow Type	+		

- 5. The LoanNEX Client Admin Encompass Mapping Setup page opens
 - a. The fields shown are the NEXApp data points with a drop-down option (i.e., data points with more than one option possible in the NEXApp)
 - b. The pencil icon indicates that the NEXApp default field option names have been updated
 - c. The plus icon ⁺ indicates that the NEXApp default field option names have NOT been updated
 - d. The Save and Undo button will not be available to select until a change has been made on the page
 - 6. Select the pencil or plus icon next to the NEXApp field you would like to customize for Encompass Mapping



Payment Penalty Ma	pping		×
Field	Encompass Custom Field Value	Default	
Add +			

7. Select the Add option

Payment Penalty	Mapping			×
Field	Encompass Custom Field Value		Default	
36	₹ 3 ⊗	×	3 Year	×
60	₹ 5 ⊗	×	5 Year	×
Add +				
				Done

- 8. Select the Field drop-down option you would like to customize in Encompass
 - a. Based on your selection, the Field and Default will populate
 - b. **Default** is how the field option will be identified in the payload and cannot be updated
- 9. Enter the **Encompass Custom Field Value** naming convention you would like to display in Encompass
- 10. Select the Add button to add another Encompass Custom Field Value
- 11. Select the **Done** button once all Custom Field Values have been mapped
 - a. IMPORTANT: You must also select the Save button on the next page





- 12. Select the Save button to activate custom mapping in Encompass
 - a. Select the **Undo** button to revert your changes and NOT activate the custom mapping in Encompass



13. A Success message will appear to let you know the custom mapping was activated



14. When pricing loans in Encompass, the custom field drop-down options will be displayed as configured in LoanNEX