LOANNEX ENCOMPASS INTEGRATION

LO Connect Integration Setup Guide

Contents

MAY 13, 2025
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

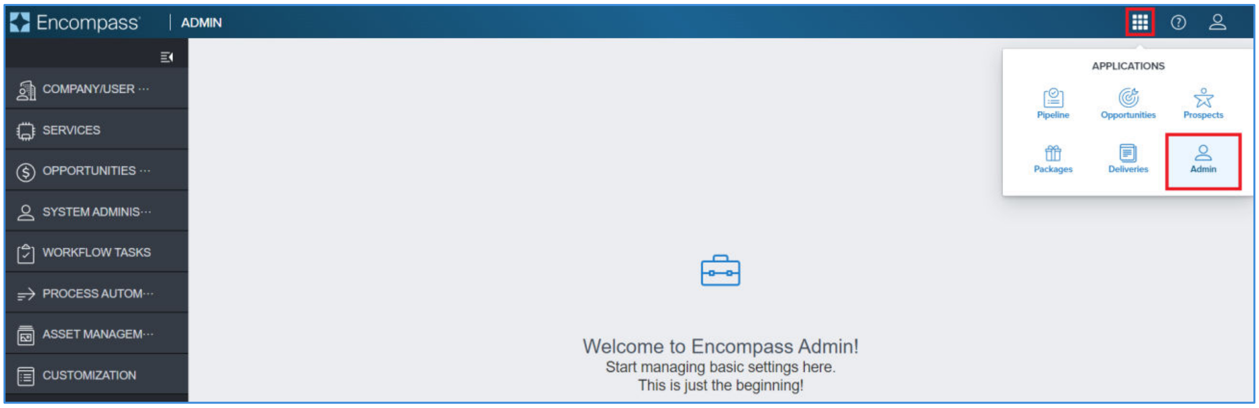
Sales and General Inquiries Contact Information

- 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

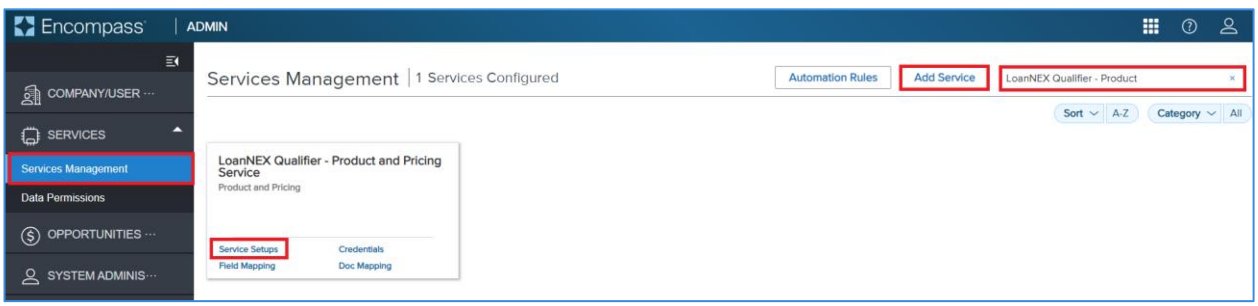
Ellie Mae Partner Connect (EPC) Integration and User Setup

Add LO Connect Provider / Enable Integration

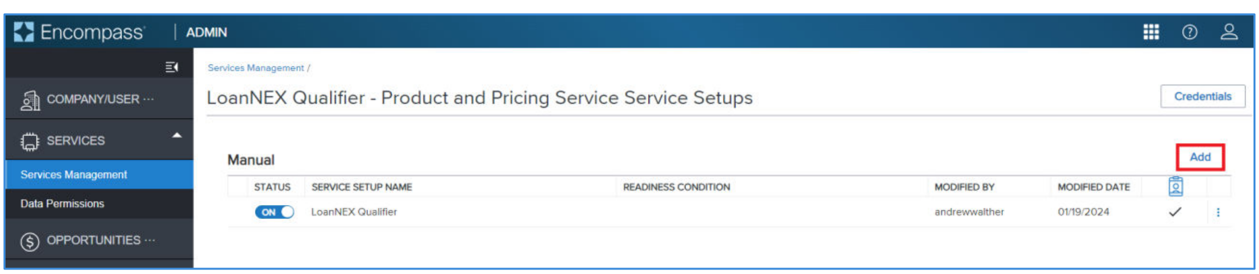
1. Login to Encompass LO Connect (encompassloconnect.com/admin)



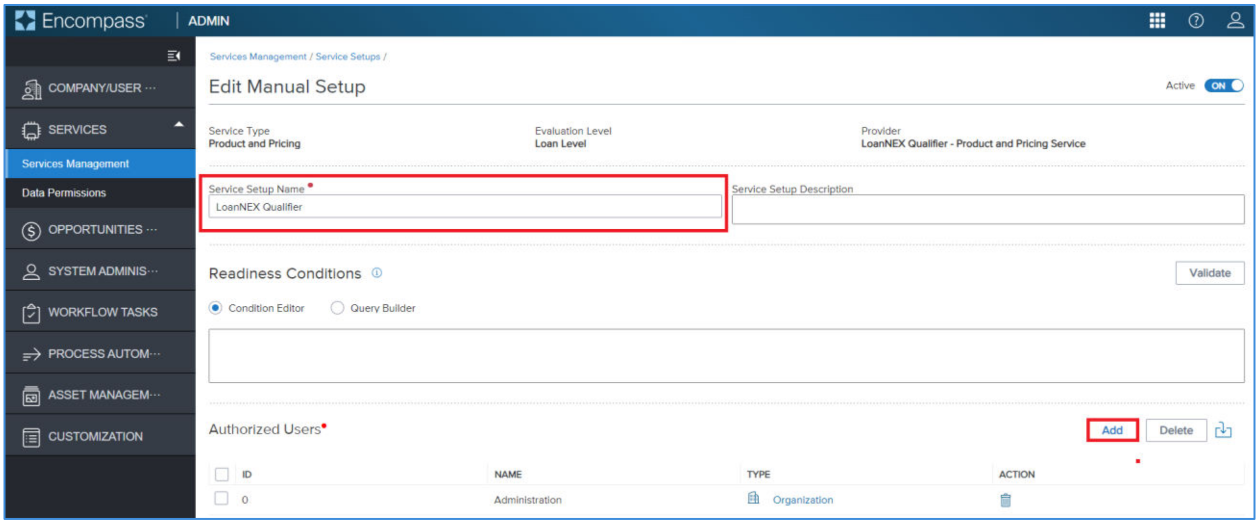
2. Navigate to the **Admin** section from the main screen



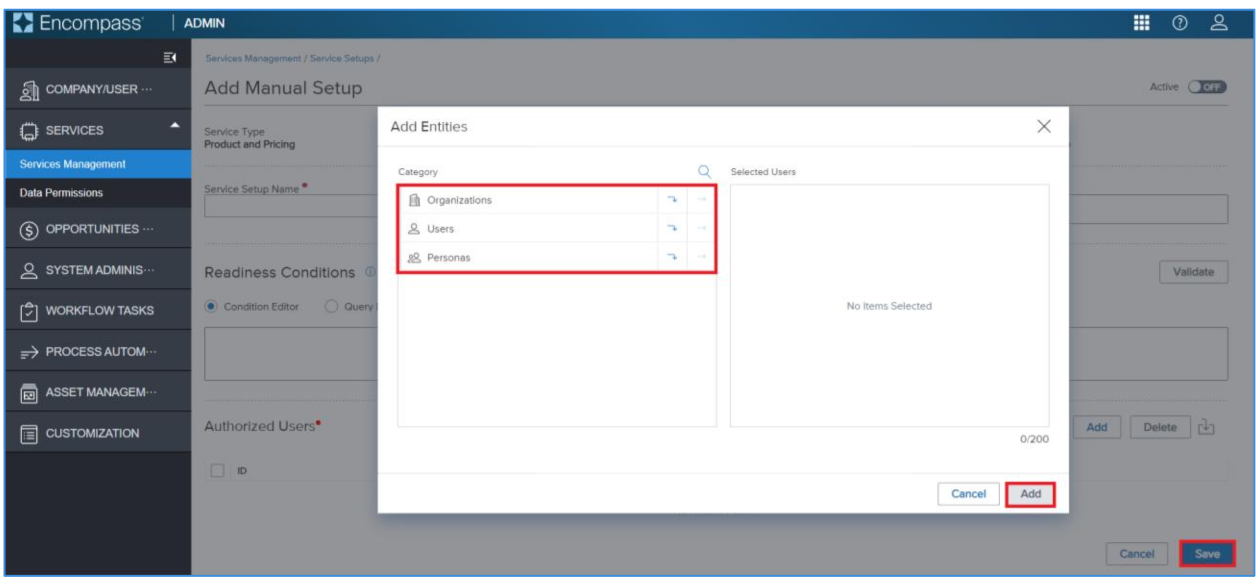
3. Select **Services Management** on the left menu bar
4. Select **Add Service** button
    a. Search for: **LoanNEX Qualifier - Product and Pricing Service**
5. Select **Service Setups**



6. Select **Add** button

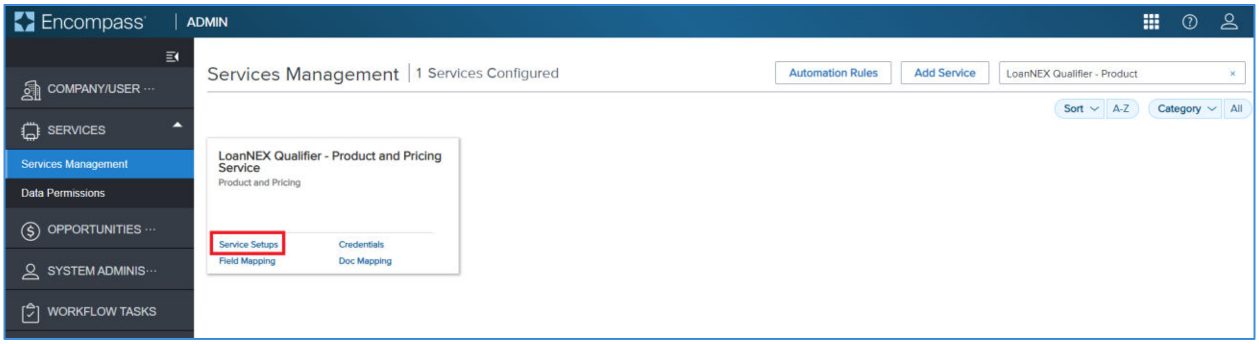


7. Edit **Service Setup Name** for the Product and Pricing Service
8. Select the **Add** button to update Authorized Users:

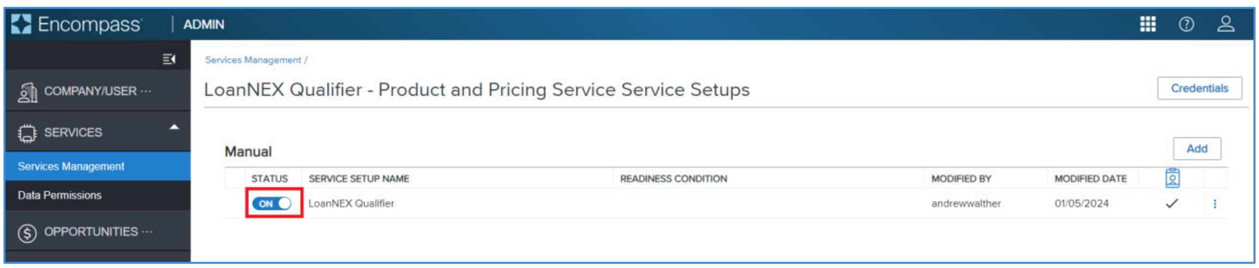


i. Select Organizations, Users and/or Personas that are allowed to access LoanNEX
ii. Click the **Add** button
iii. Repeat until Authorized Users complete

b. Select the **Save** button



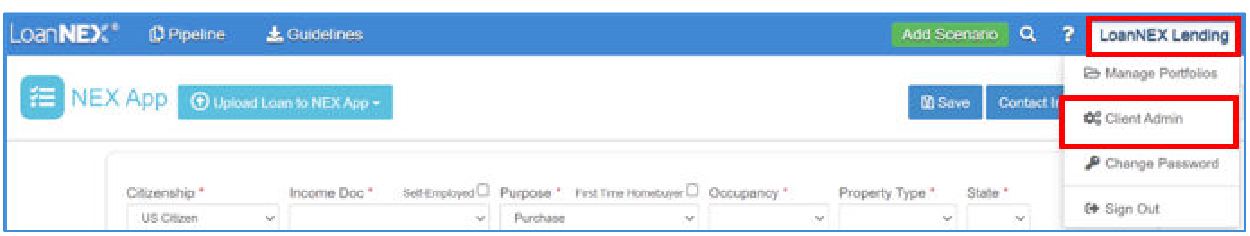
9. The new Provider, LoanNEX Qualifier - Product and Pricing Service, displays as a card on the Services Management page
    a. Select **Service Setups**



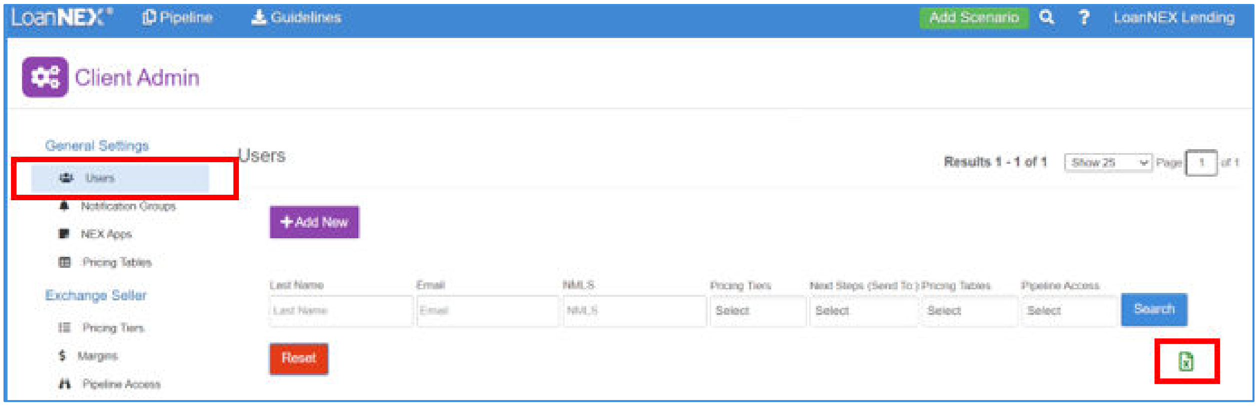
    b. Select the **Status** radio button to turn “On” the integration

Create Encompass / LoanNEX Users

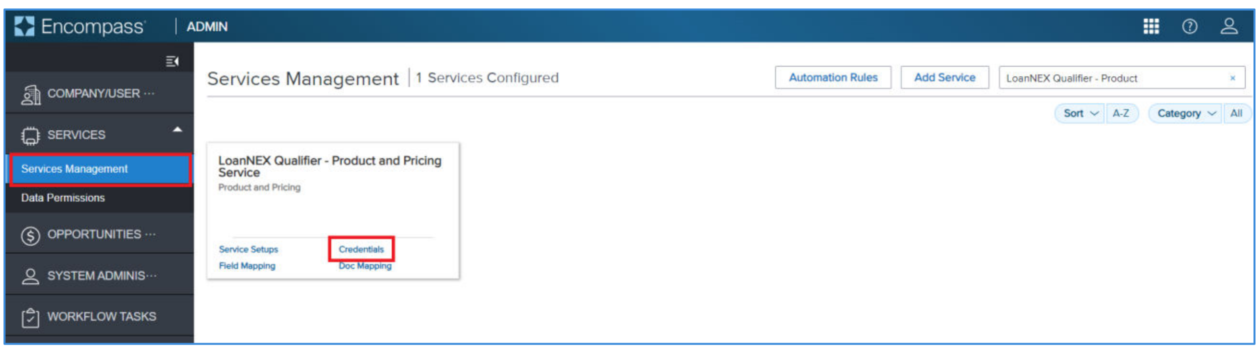
1. Login to LoanNEX at https://web.loannex.com/



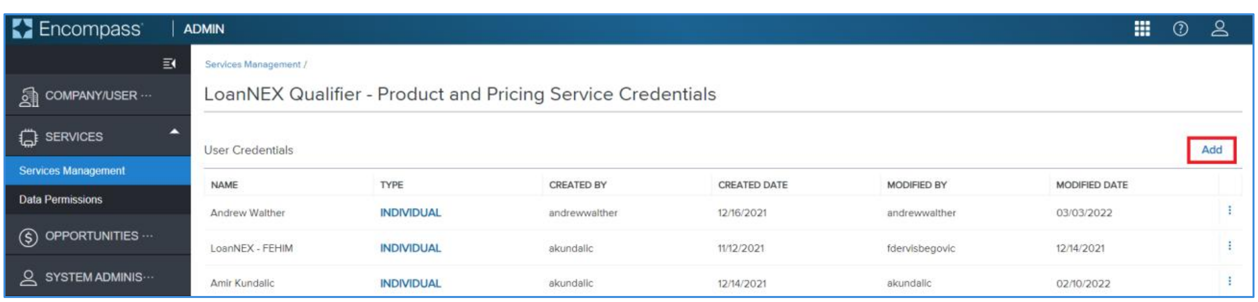
2. Click your Company Name in the upper right of the screen
3. Select **Client Admin**



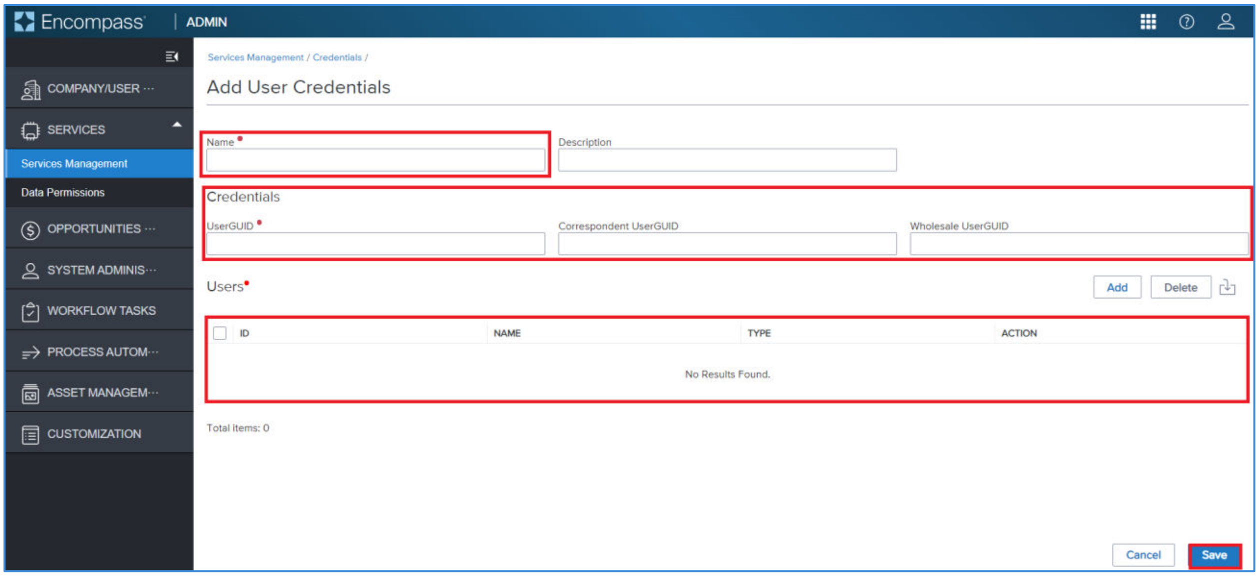
4. The Client Admin section of LoanNEX will open to the **Users** page
5. Select the **excel icon** to export your Company's User list
6. The User list export will show a UserGUID (Column AL) for each User
    a. You will need this UserGUID to create the Encompass User in following steps
7. Login to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

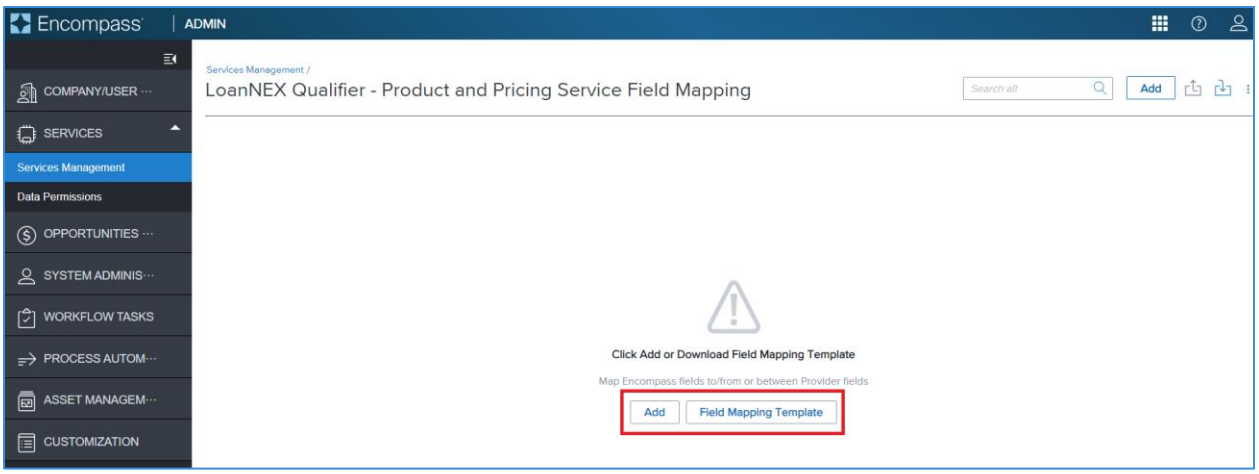


11. Enter the User Credential Information
    a. Enter the User's **Name**
    b. Enter **UserGUID**
        i. If User has access to **one** LoanNEX Account, enter the LoanNEX UserGUID in the first UserGUID field
            1. **If the one account the User has access to is either Correspondent or Wholesale**, 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

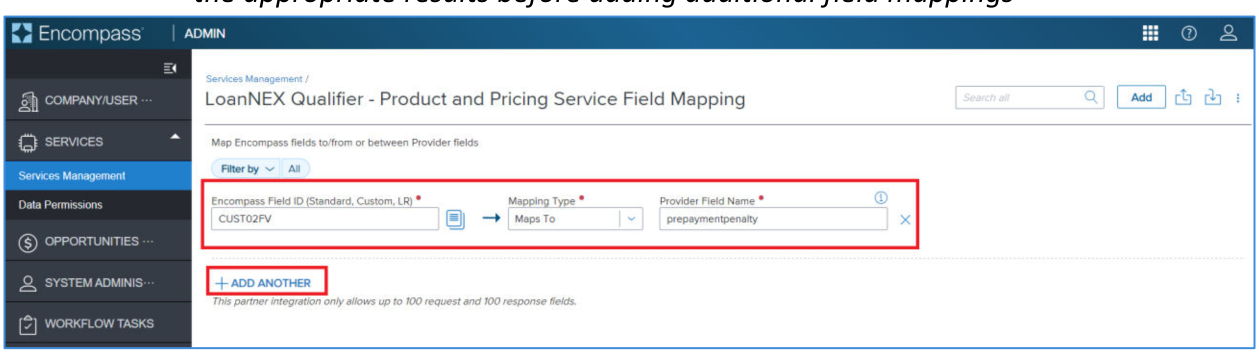
LoanNEX Custom Field Mapping to/from EPC and LoanNEX

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**



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**

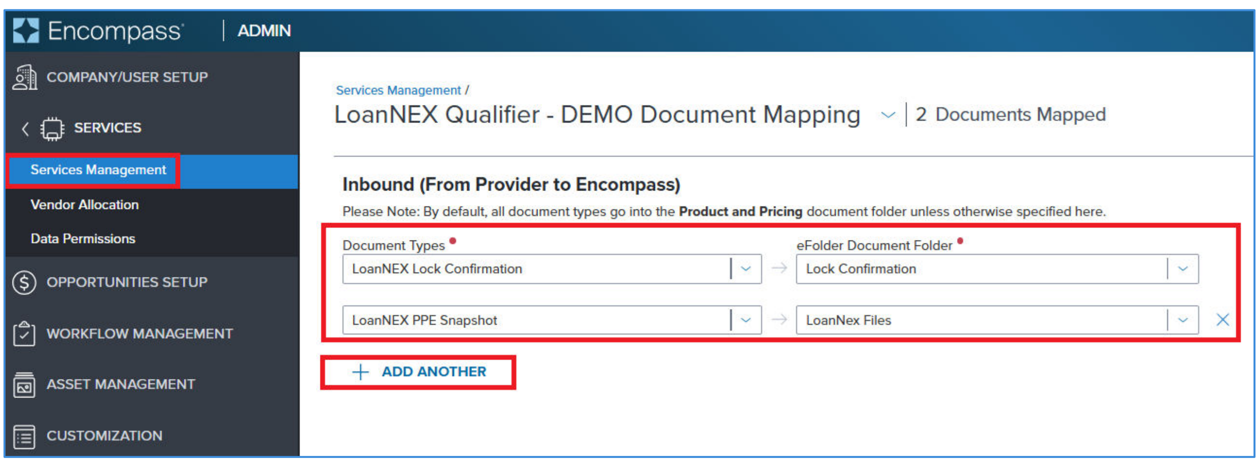
7. Select **Add Another** as needed, or go back to the Field Mapping page to download an excel template and create multiple mappings

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**

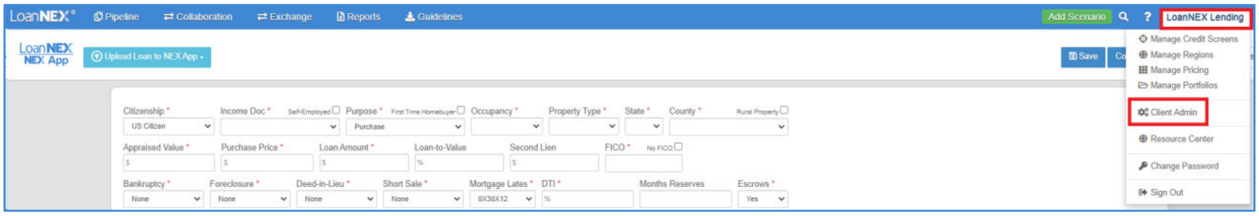


Screenshot shows successful mapping of both PDFs

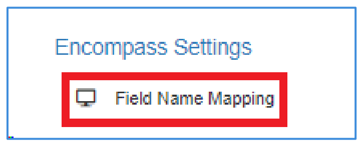
5. Click **Add**
6. Select the **Document Type**
    a. LoanNEX PPE Snapshot = Record of Business (ROB)
    b. LoanNEX Lock Confirmation = Lock Ticket
7. Select the **eFolder Document Folder** (this will override saving the PDFs in the Product and Pricing folder)
8. Select **Add Another** as needed.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

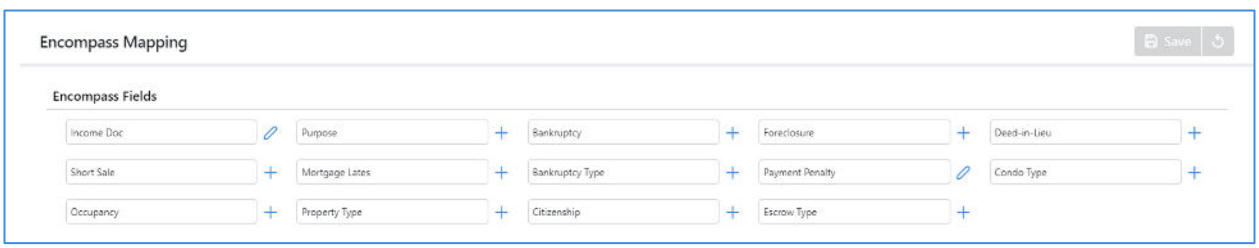
1. Login to LoanNEX at https://web.loannex.com/



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

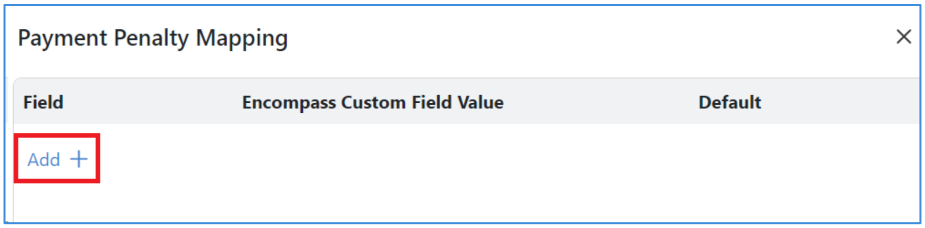


4. Scroll down and select **Field Name Mapping**, under Encompass Settings, on the left menu panel

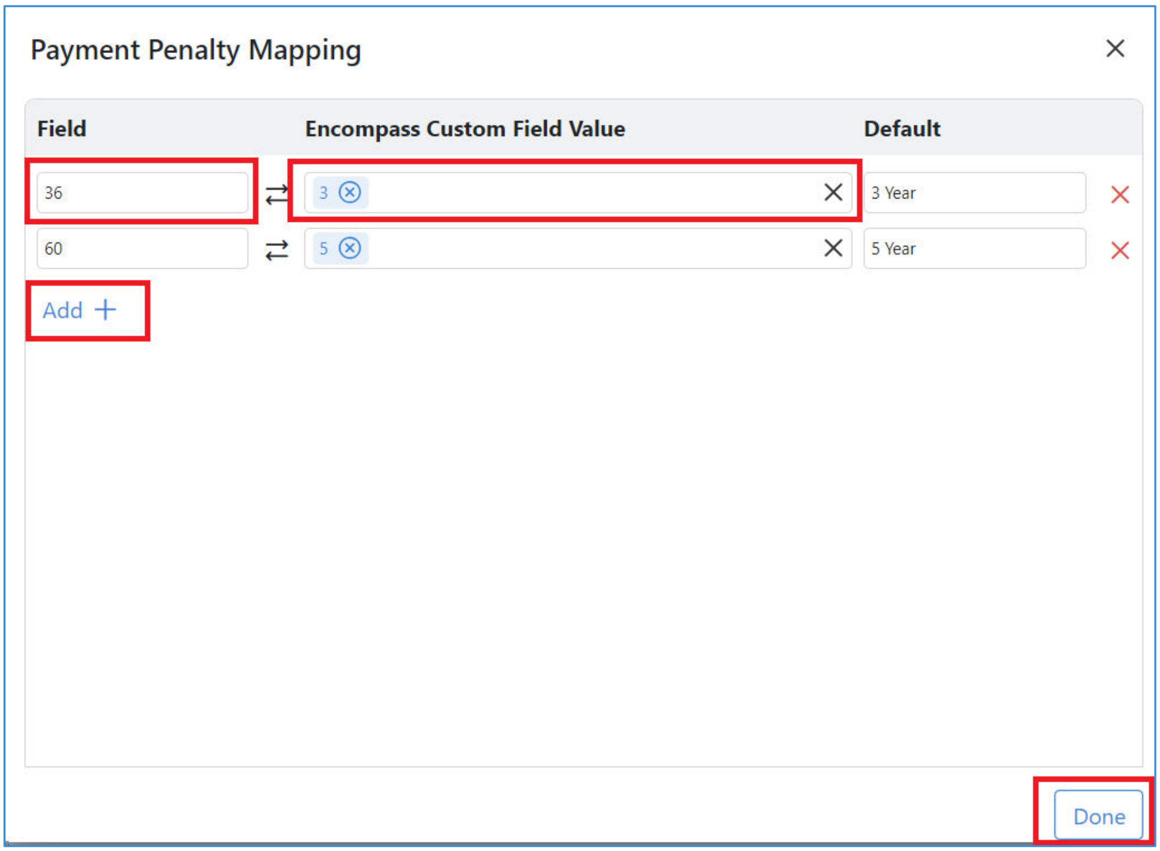


5. The LoanNEX Client Admin **Encompass Mapping** Setup page opens
   a. The fields shown are the NEXApp data points with a drop-down option (i.e., data points with more than one option possible in the NEXApp)
   b. The pencil icon indicates that the NEXApp default field option names have been updated
   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

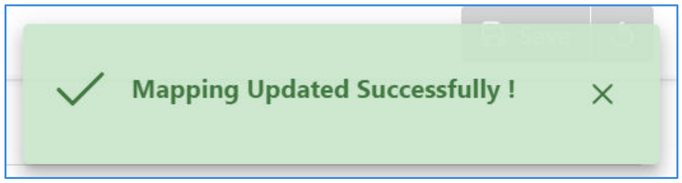


7. Select the Add option

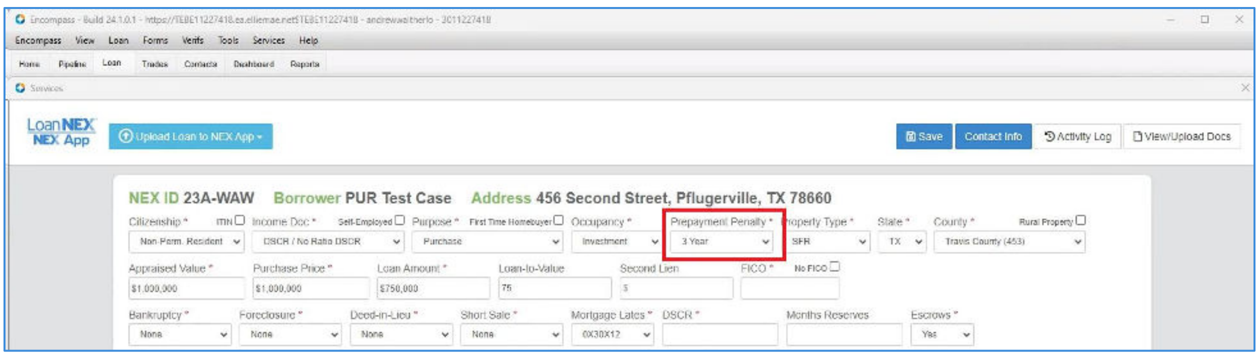


8. Select the **Field** drop-down option you would like to customize in Encompass
    a. Based on your selection, the **Field** and **Default** will populate
    b. **Default** is how the field option will be identified in the payload and cannot be updated
9. Enter the **Encompass Custom Field Value** 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. <u>**IMPORTANT**</u>: 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