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## LOANNEX ENCOMPASS TPOC CLIENTS

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Record of Business PDF Mapping to eFolder

Setup Guide

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LoanNEX

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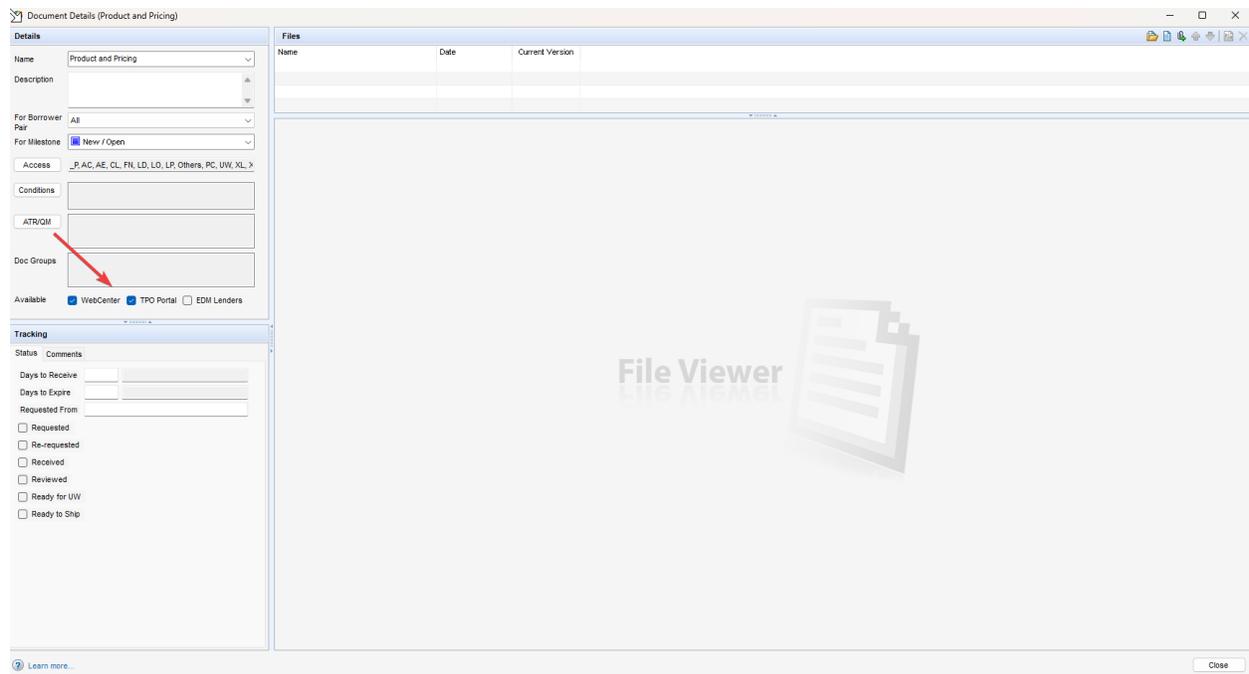
## Record of Business PDF Mapping to eFolder

When a Register Product -OR- Lock Action is completed within LoanNEX, a PDF copy of the Record of Business is passed back to the “Product and Pricing” eFolder.

**Important Note:** Below are general steps to guide you through enabling the Product and Pricing eFolder in TPOC and Webcenter. Please consult with your Encompass Administrator to determine the most appropriate course of action. If you have additional questions regarding Encompass Settings or Setup, please reach out to ICE support.

### Enable eFolder

If you choose to allow access to the “Product and Pricing” eFolder to your end users within TPOC, you will need to enable the Product and Pricing document eFolder to be seen in TPOC and Webcenter.





## Confirm TPO User Personas Access

You will also need to make sure your TPO user personas are updated within your Encompass Admin Settings to have the appropriate access in TPOC to the eFolder.

**2. Define access for the TPO Loan Officer persona.**

Access Home Pipeline Loan Forms/Tools eFolder Enhanced Conditions Trades/Contacts/Dashboard

Access to Document Tab

**General**

- Create/Duplicate Documents
- Manage Access to Documents
  - Remove Access From Protected Roles
- Send Consent
- Request Borrower Documents
- Request ICE Mortgage Technology Network Services
- eDisclosures
  - Add Additional Docs
  - Move Docs Up/Down
  - Deselect Docs
- Retrieve Borrower Documents
- Retrieve ICE Mortgage Technology Network Services
- Send Files
- Send Files to Lender
- Archive Documents
- View All Annotations
- Packages Tab
  - eSign Packages

**Unprotected Documents**

- Edit Document
  - Edit Document Details
    - Create New Document Name
  - Add Comment
  - Delete Comment
  - Browse and Attach
  - Scan and Attach
  - Attach Encompass Forms
  - Attach Unassigned Files
  - Move File Up/Down
- Edit File
  - Delete Page Permanently
  - Merge Files
  - Split File
- Add Notes to File
  - Delete Notes
- Remove File from Document
- Mark File As Current Version
- Mark Status As Reviewed

- Delete Document



## TPOC Document Folders

Within TPOC, the Document Folder should be reflected in the “+ Add Document” button and that will apply it to the individual loan. If you want that folder to be static, you will need to include it in your document set for the loan template you are using.

The screenshot displays the TPOC web application interface. At the top, there is a navigation bar with tabs for 'Welcome', 'Pipeline', 'Add New Loan', 'Scenarios', and 'Documents'. Below this, the loan details are shown: 'James 05\_03 #1', '123 Park Place, Nashville, TN, 37202', 'Broker2'. Loan information includes 'Loan # TEST240501396', 'Total Loan Am... \$698,750.00', 'Loan Type: Conventional', 'Loan Purpose: Purchase', and 'Interest Rate: 0.000% LTV/Comb Lo... 61.88% / 61.88%'. There are also buttons for 'Start', 'Win', 'List', and a user profile icon.

The main content area is titled 'Documents' and features a sidebar on the left with navigation options: 'Loan Summary', 'URLA', 'Product Pricing & Lock', 'Loan Estimate Fee Management', 'Documents' (highlighted), 'Conditions', and 'Fees'. Under 'LOAN ACTIONS', there are links for 'Import Additional Data', 'Order Credit', 'Order DU', and 'Order LPA'.

The central document management area shows a message: 'Max attachment size is 200 MB. View Supported Files.' It includes buttons for 'Expand All', 'Collapse All', '+ Add Document', and 'Print Fee Cover Sheet'. There are two document categories: 'All Borrowers' (with '[UNASSIGNED]' status) and 'PRODUCT AND PRICING'. Each category has a 'Comments' icon, a 'Drag & Drop files here or' prompt, and a 'Browse for files' button.