ValueLink®

ValueLink® Encompass Partner Connect (TM) - AMC

Encompass Web Application

Setup Guide for AMCs

2024

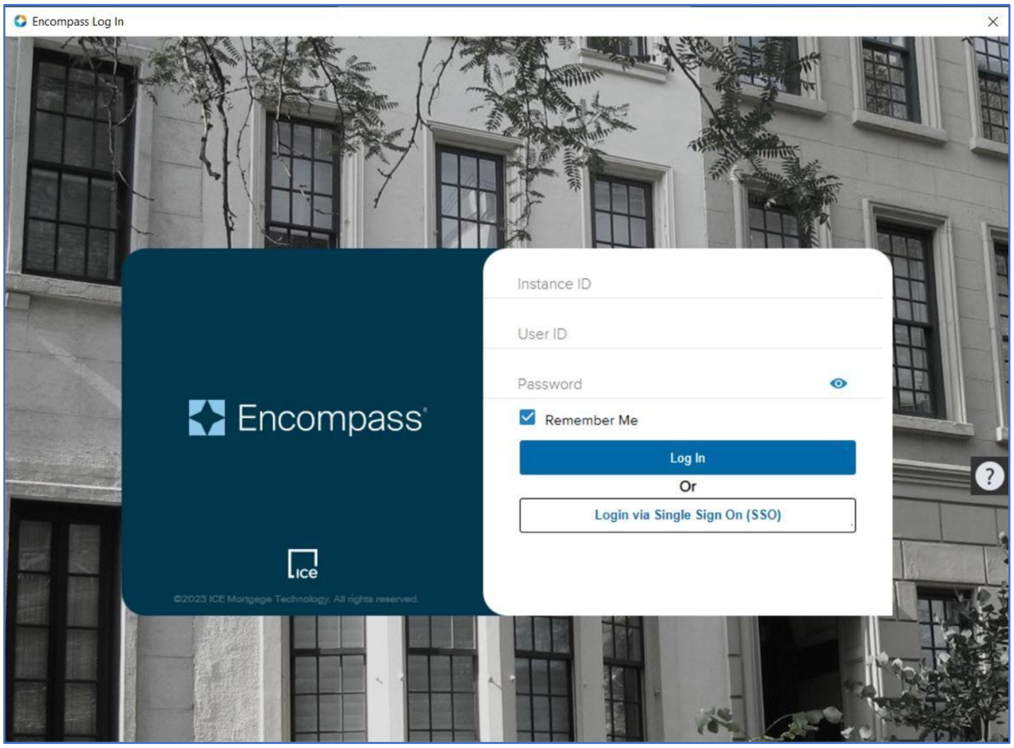
www.valuelinksoftware.com

Table of Contents

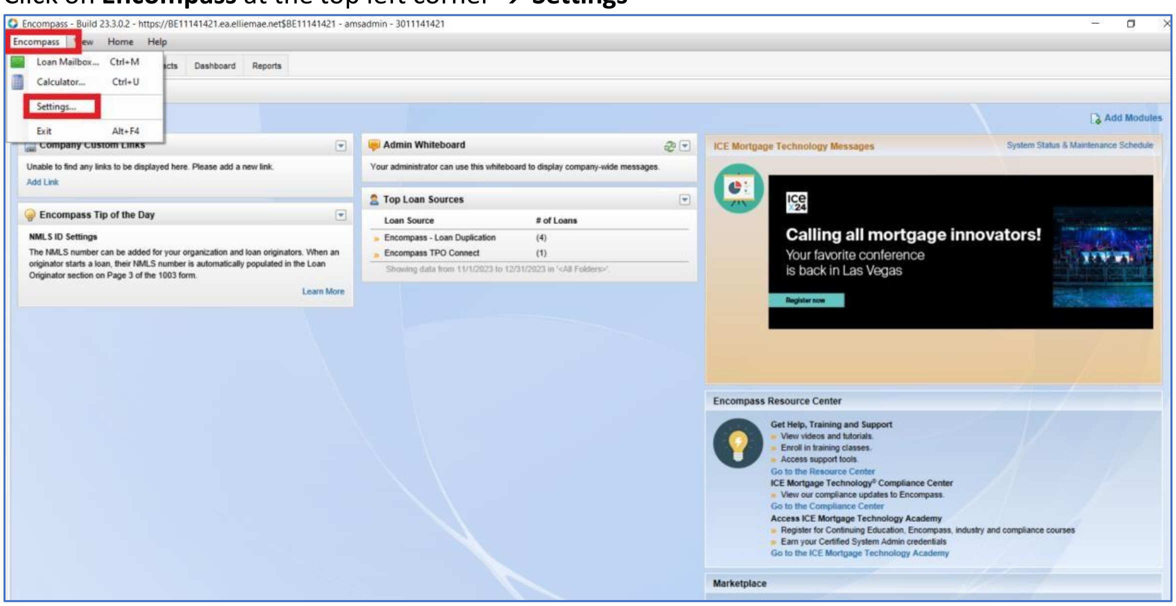
Setting up the ValueLink AMC service in Encompass

Using Encompass Desktop Application:

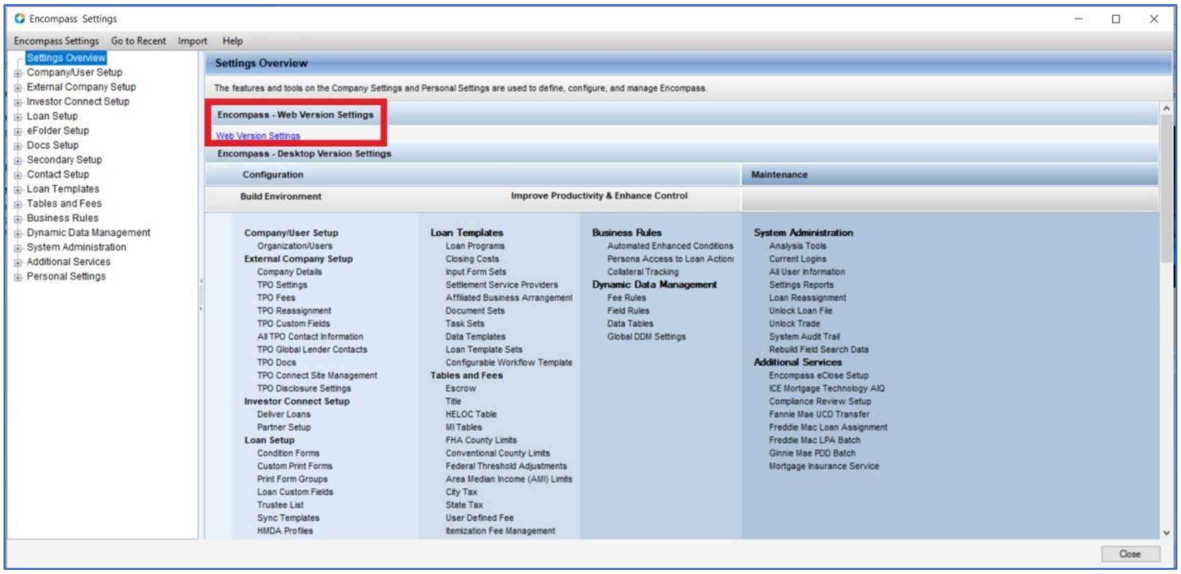
- Click on the Encompass desktop application icon.
- Login to the application using the admin credentials.



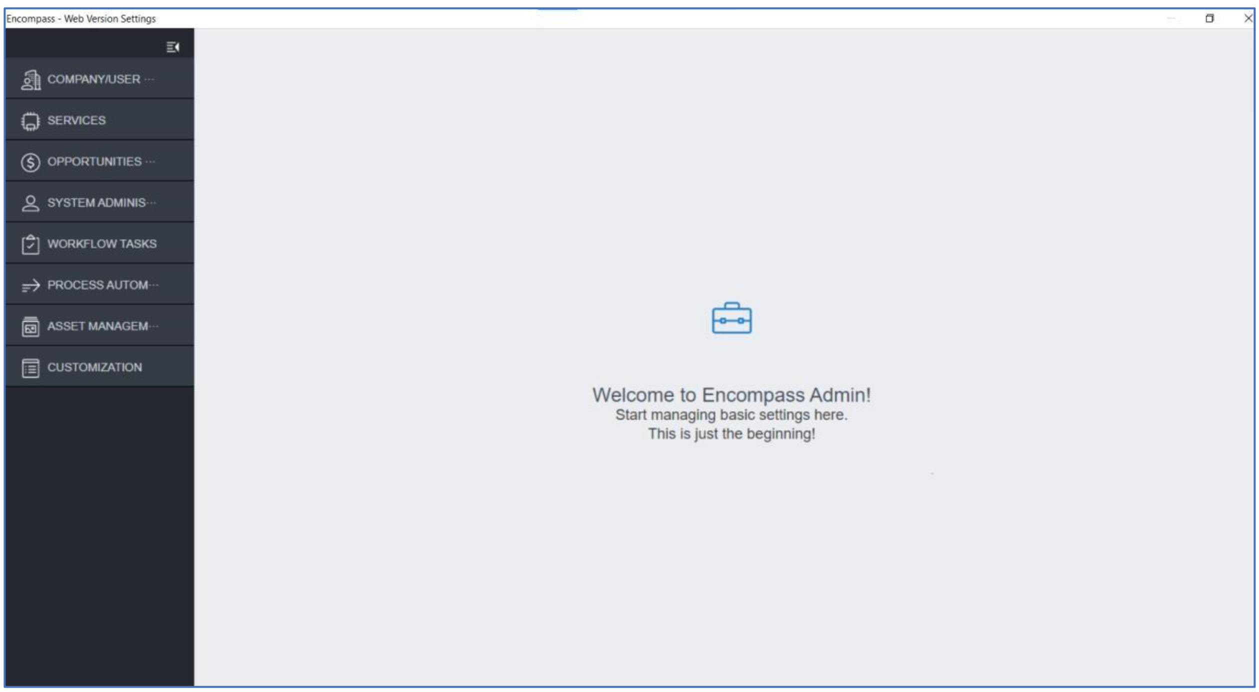
- Click on **Encompass** at the top left corner → **Settings**



- Select **Web Version Settings** under the **Encompass – Web Version Settings** section



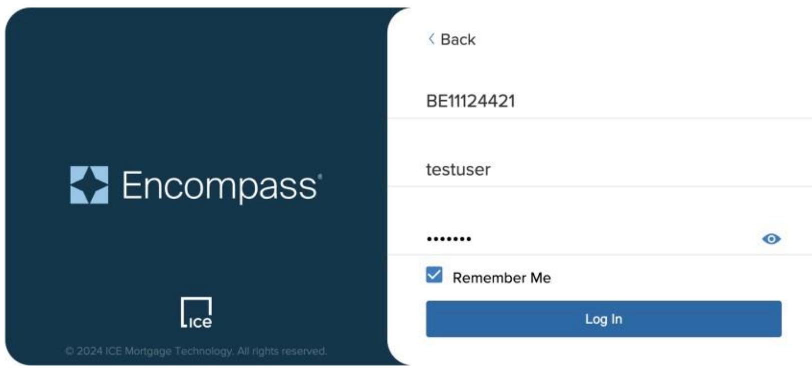
You have now access Encompass Web Application admin interface. Follow the steps below to setup a service.



Using Browser to access Encompass Web Application

Go to https://encompass.ice.com

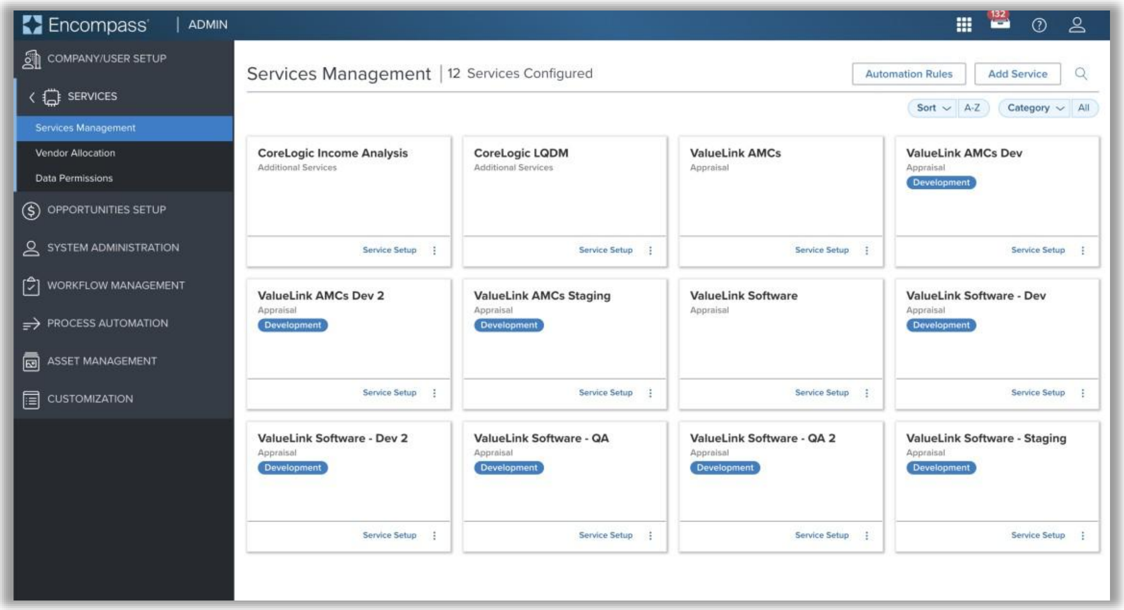
- Enter **Instance ID** (Client Encompass ID
- Log in using admin credentials
    - Enter **Username** and **Password**
    - Click on the **Log In** button.



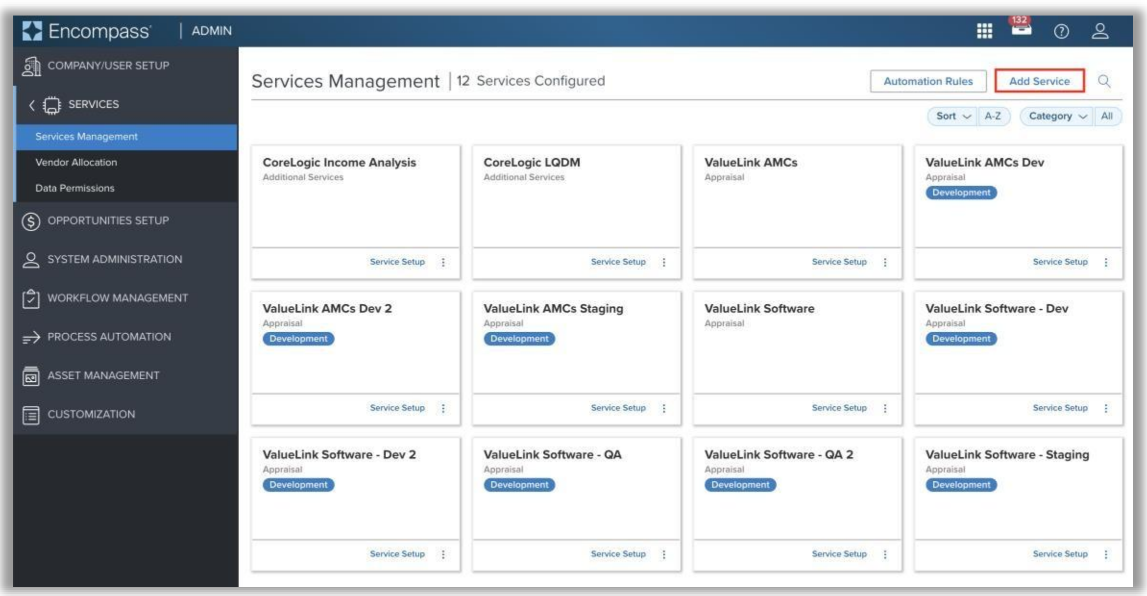
Add ValueLink AMCs as a Service

Once you log in, the first task would be to set up the Service. Follow the below steps to set up **ValueLink** as a Service in Encompass.

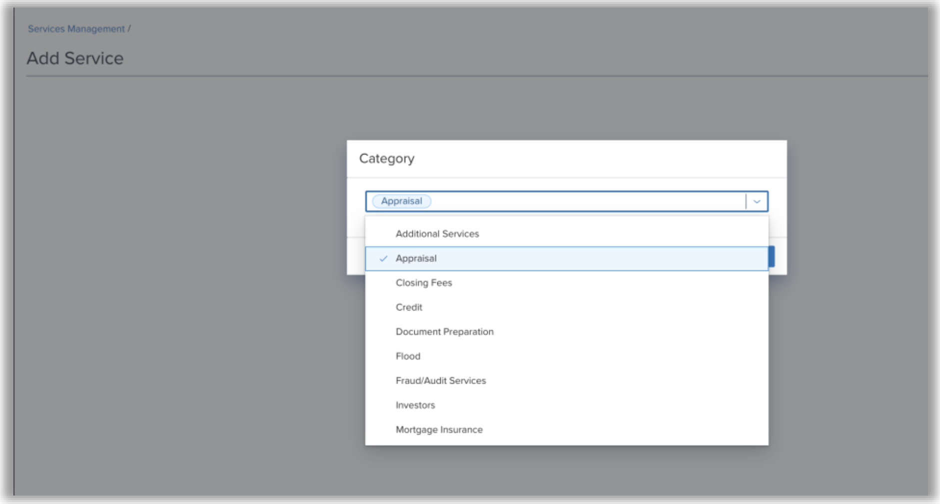
- From the side menu, Click **Services → Services Management.**



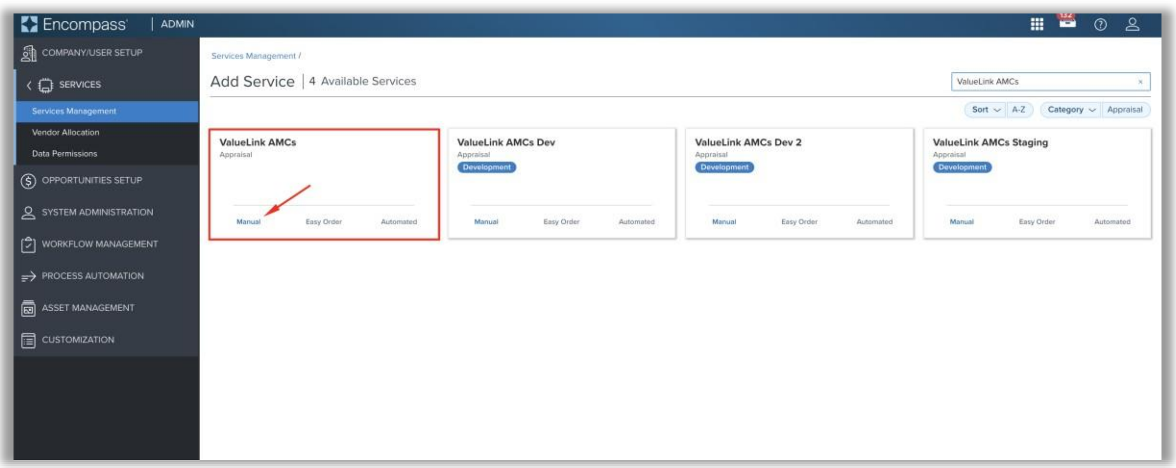
- The grid containing all the services configured on the instance will be displayed.
- To add a new service, click on **Add Service**



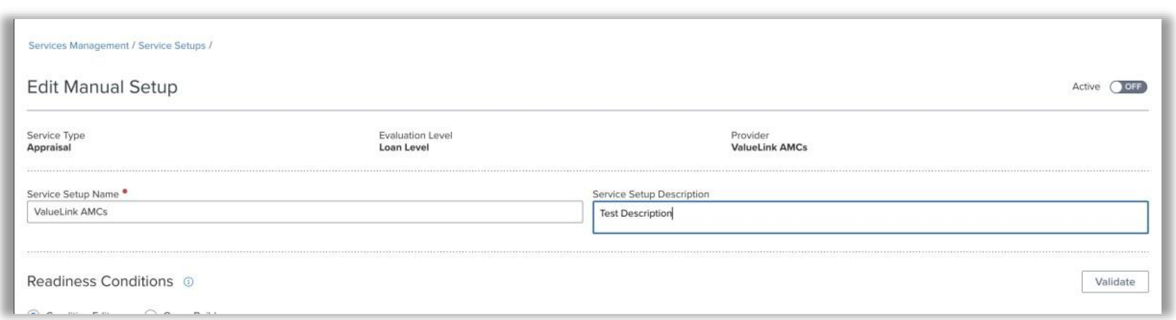
- From the Category list, select **Appraisal**



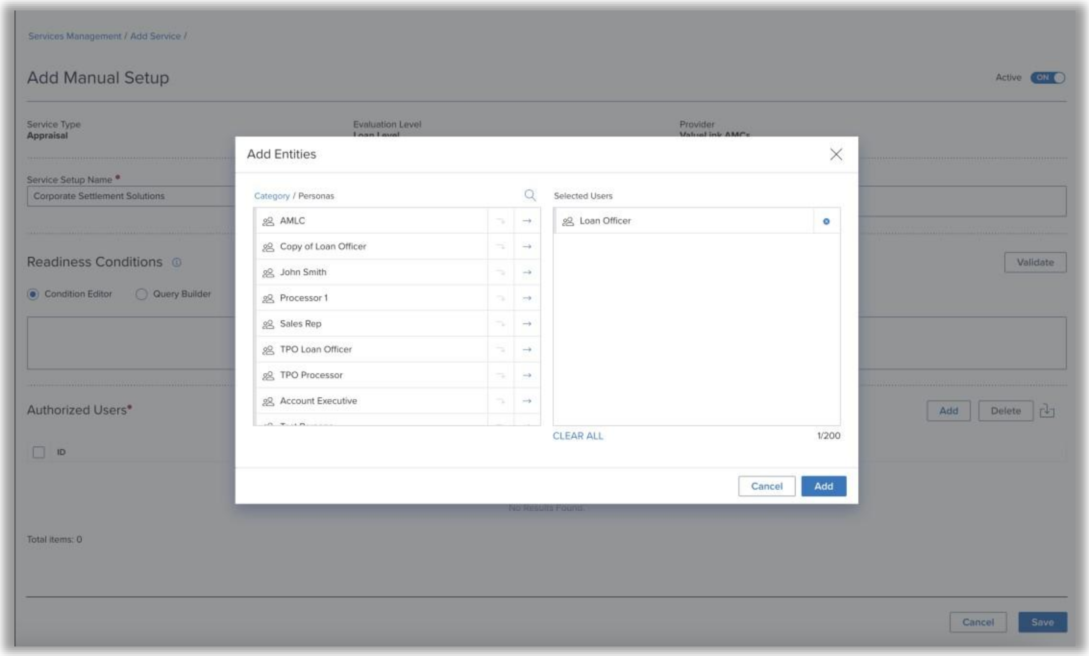
- In the provided search bar, type in “**ValueLink AMCs**” and click on “**Manual**”



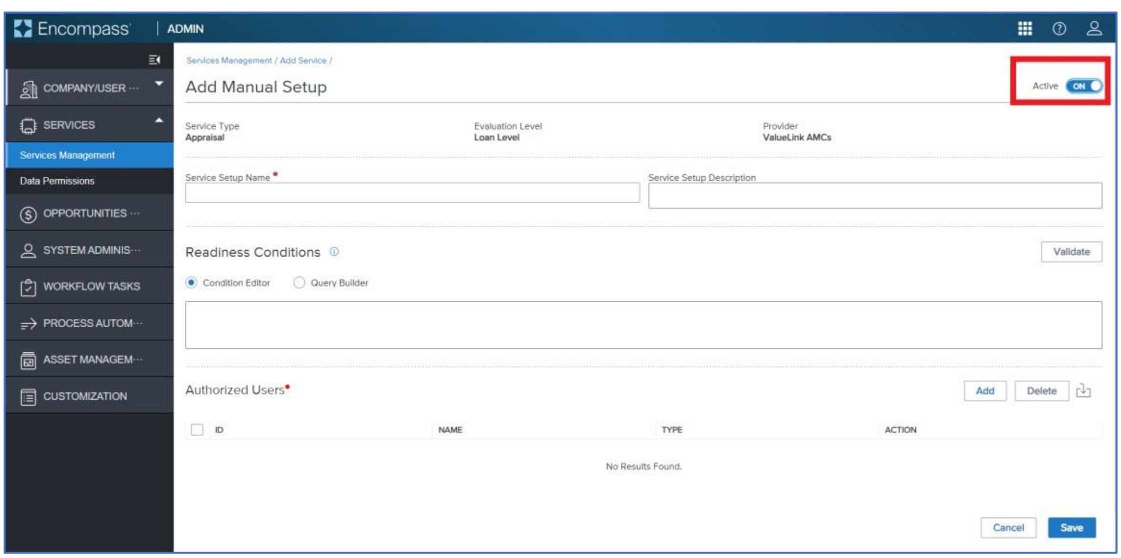
- Enter **Service Setup Name (ValueLink AMCs)** and mark the service as **Active**



- In the **Authorized Users** section click on **Add.** This allows you to give access to the service to selected users in your company. You can always opt to add or remove any user from using the service.

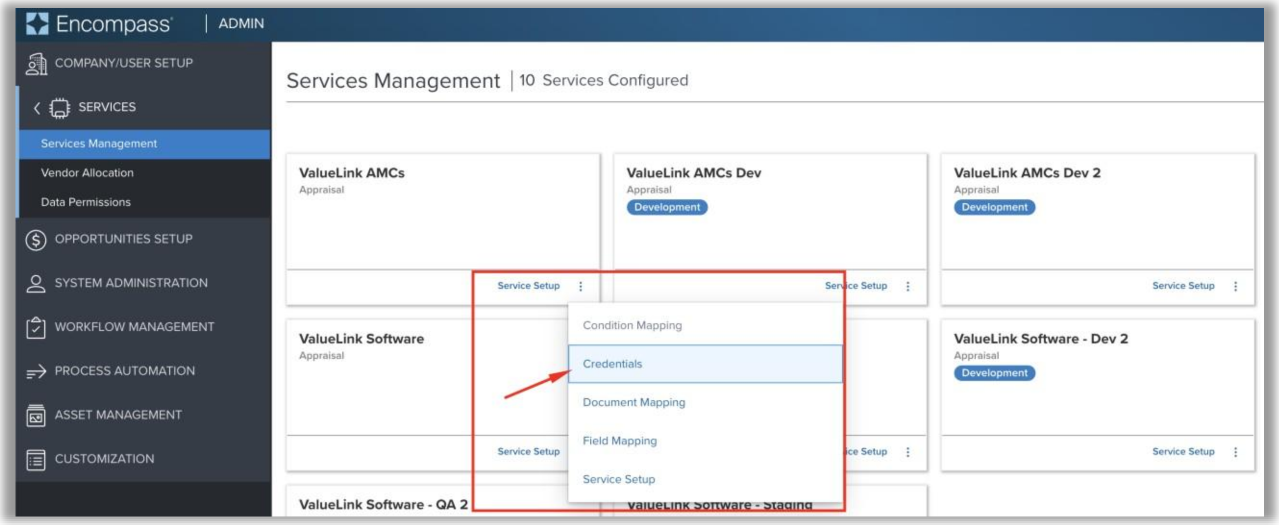


- Once the service has been configured, turn on the toggle to "**Active**" and **Save** the service.

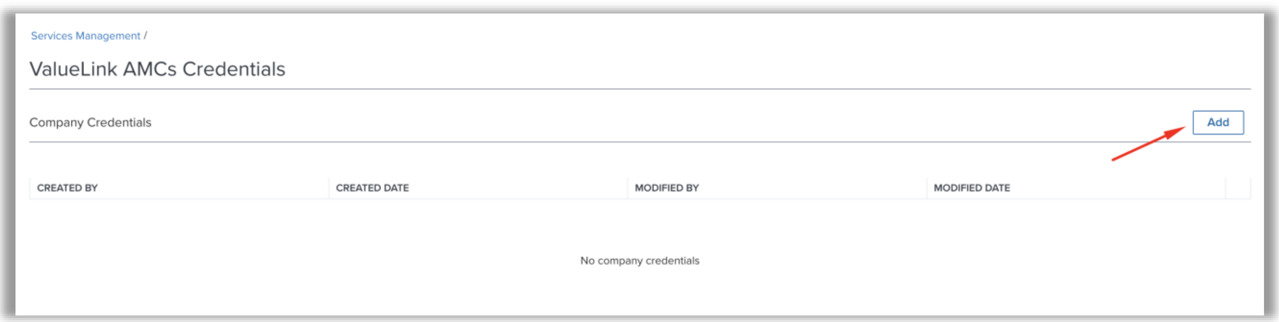


Set Up Credentials

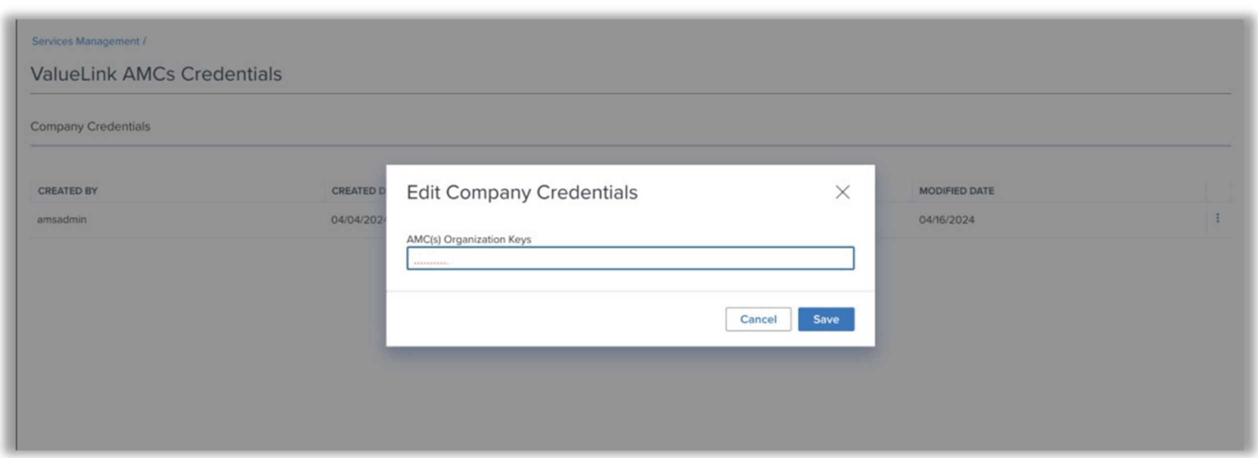
Each **Service** in Encompass compels us to set up **credentials** that are necessary to use the service. To set these up, go to Services -> Services Management.



On the **Credentials** screen, click on the Add button

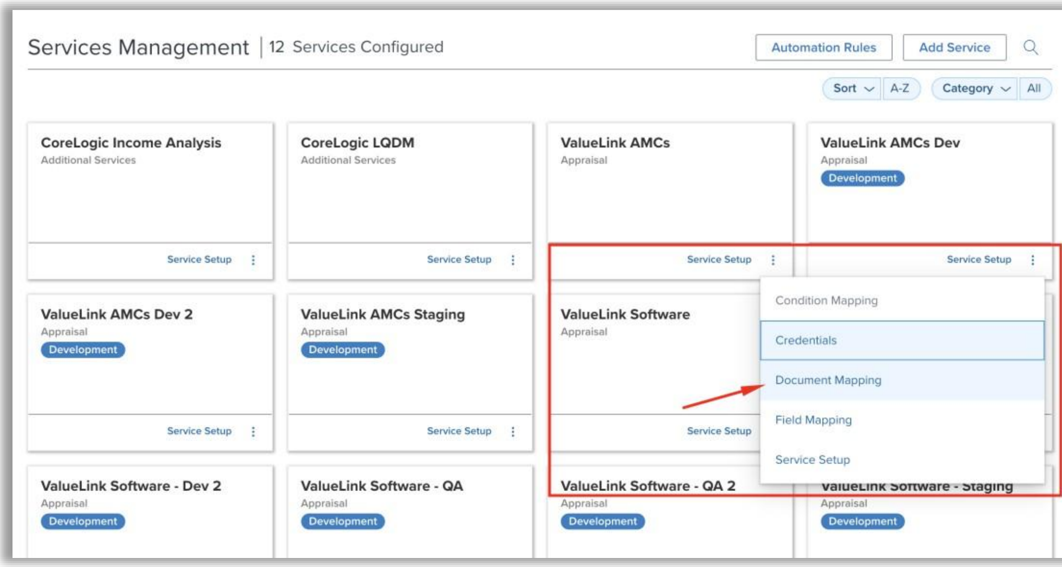


Add the AMC Organization Keys and click on **Save**.



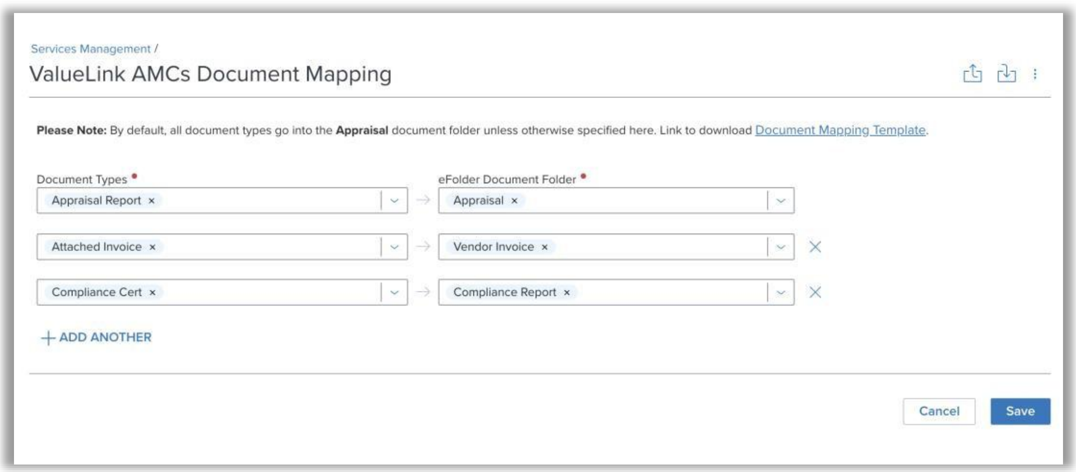
Document Mapping

Document mapping allows the user to outline the **Document Folder (eFolder)** for each **Document Type** that is shared by the provider. Document Mapping settings can be accessed from the **Service Management** screen.



ValueLink provides **Document Type** list to lenders which can be consumed to map documents, for example, Appraisal Report, Invoice, Compliance Certificate, Crosscheck Report, etc. Any document type listed on this page can be mapped against a folder in the E-Folder.

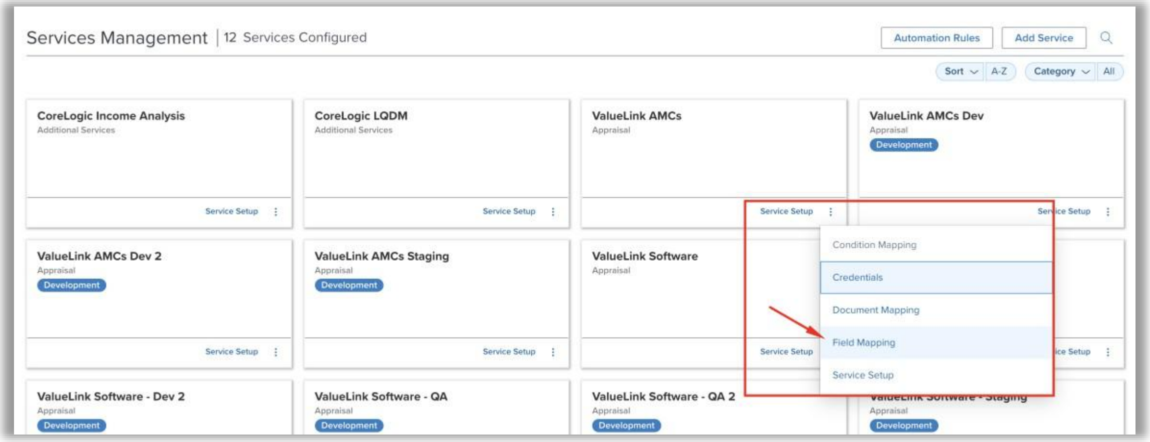
- On the left column select the provider **Document Type** from the drop down
- On the right column select the E-folder you want your document to map to. E-folders can be created by typing in the name even if it doesn't exist in the drop-down menu.



- Click on **Save** to finish.

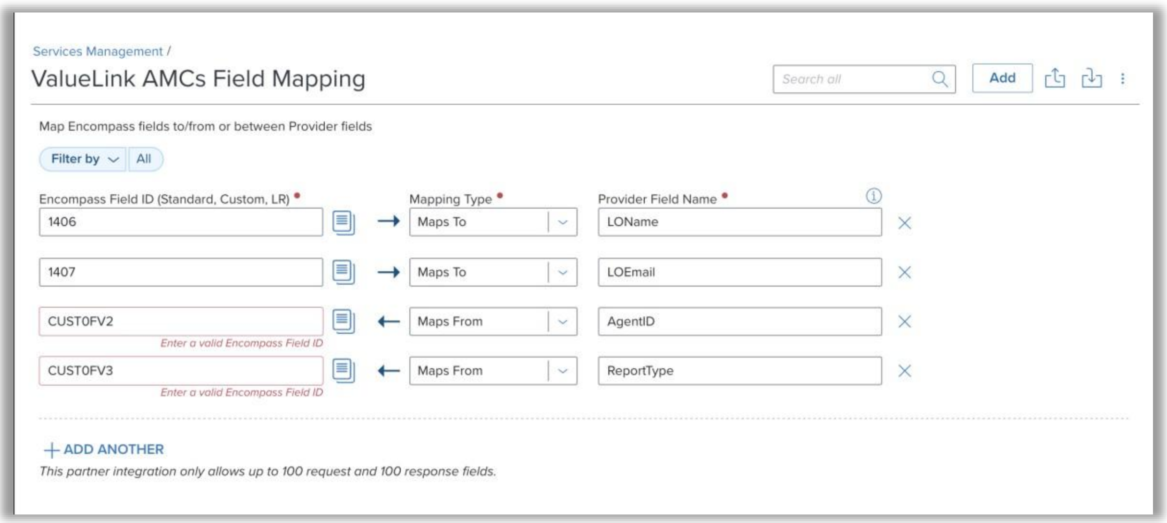
Field Mapping

Encompass allows partner integrations to map their custom fields with Encompass. Field mapping settings can be accessed from the **Service Management** screen.



Field mapping can be configured to map from Encompass to provider, and vice versa.

- To map fields from Encompass to Provider, select **Maps To** in the Mapping Type drop down.
- To map fields from Provider to Encompass, select **Maps From** in the Mapping Type drop down.
- In case of two-way mapping, select **Maps Between** within the drop down.

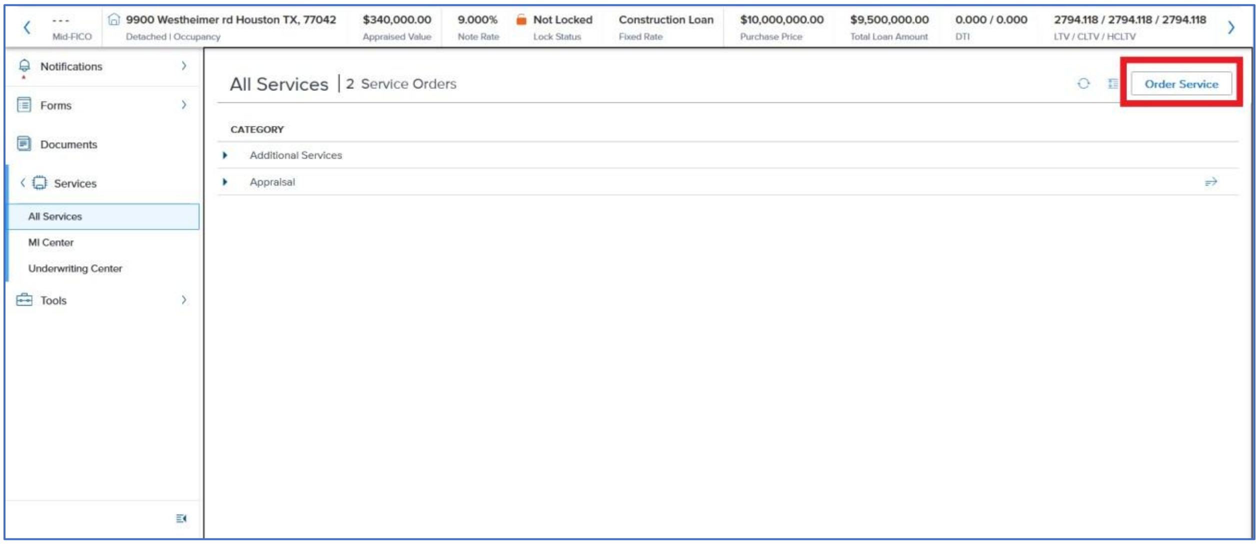


Note: General Fields can only be configured as "**Mapped To**".

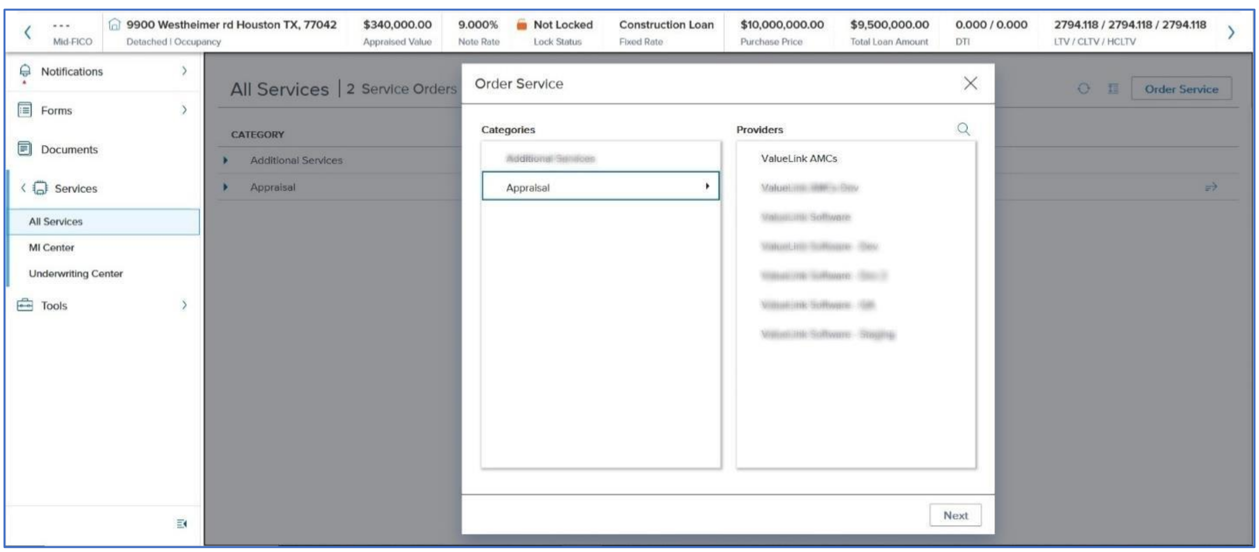
Now that you have successfully set up ValueLink on Encompass, you can order an appraisal by going to **Services** section.

Order an Appraisal using the ValueLink AMCs Service

- To order an appraisal, go to your **Pipeline** and open a Loan
- Go to **Services → All Services → Order Service**

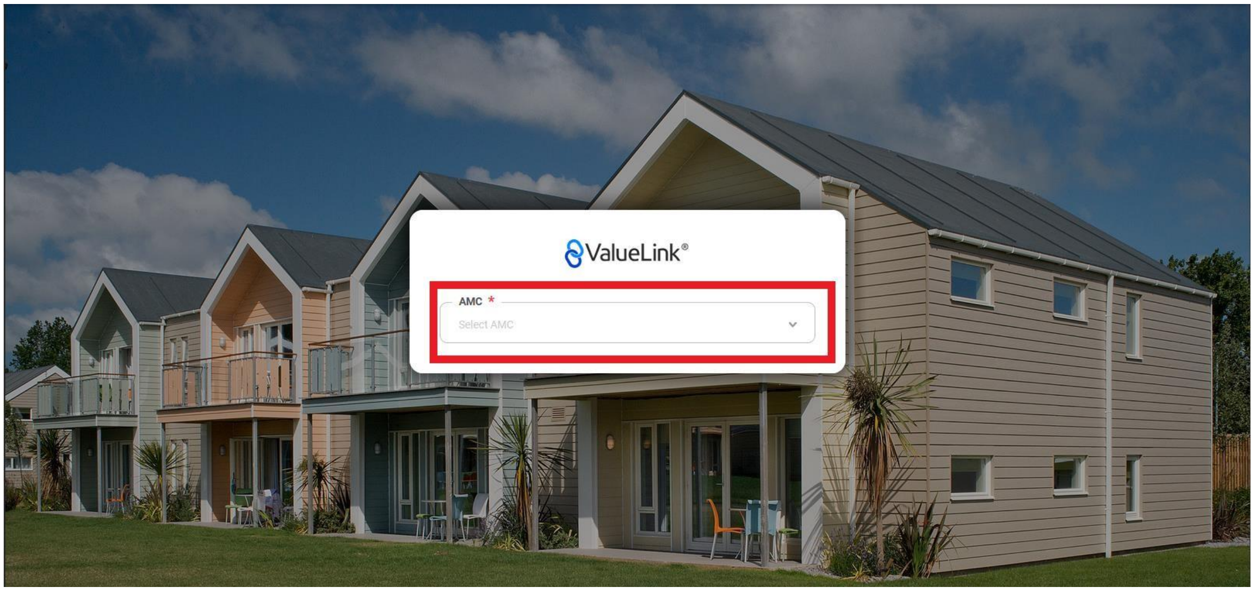


- Select **Appraisal → ValueLink AMCs** and click on **Next**

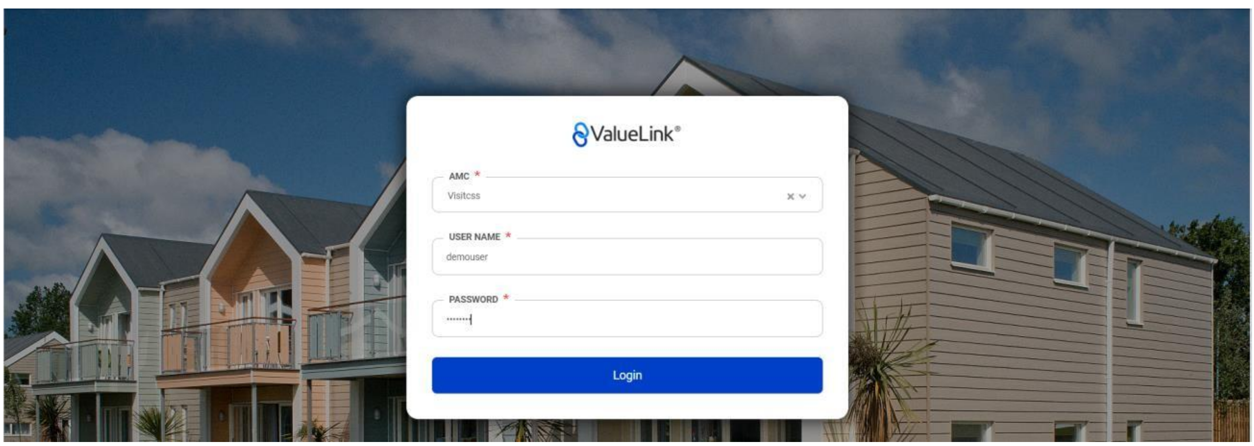


Single Sign-On

If the lender has multiple ValueLink AMCs set up, the integration allows users to select from a list of AMCs that were configured during in the service setup while adding Company credentials.



- Select from the AMC drop-down.
- Enter the Username and Password that was provided to you by the AMC.



- Once you login, the user credentials are stored and you won't be required to enter them again on your next login.

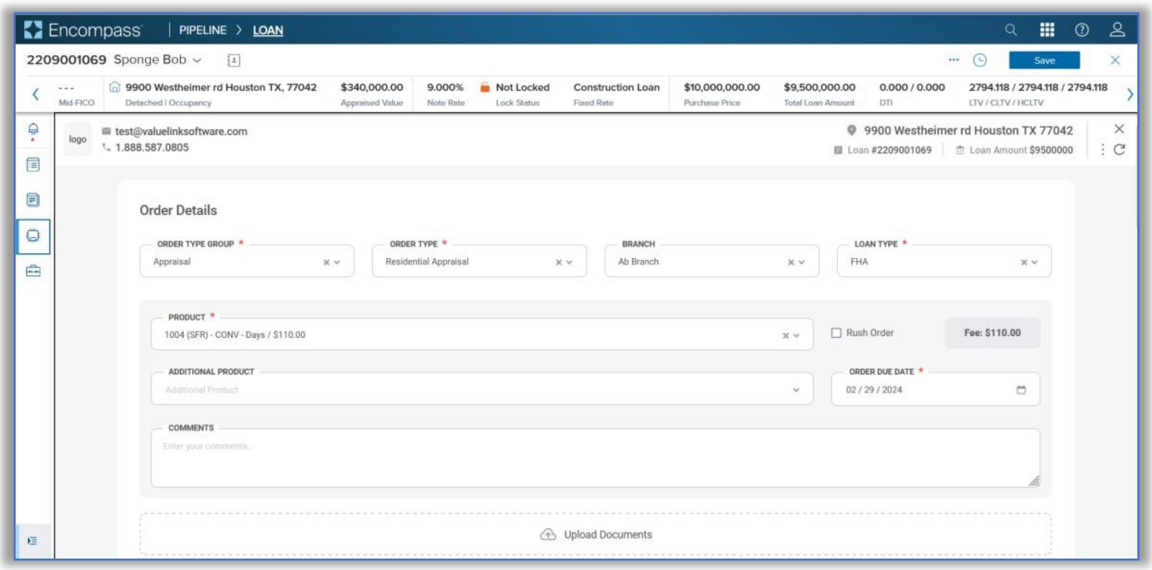
Note: If you work with multiple ValueLink AMCs, each of your credentials will be stored and you will be able to select the appropriate user to login.

Create An Order

Once you log in, you will be directed to the ordering form where you can order the valuation product with the provider. The order form is broken down into 5 steps.

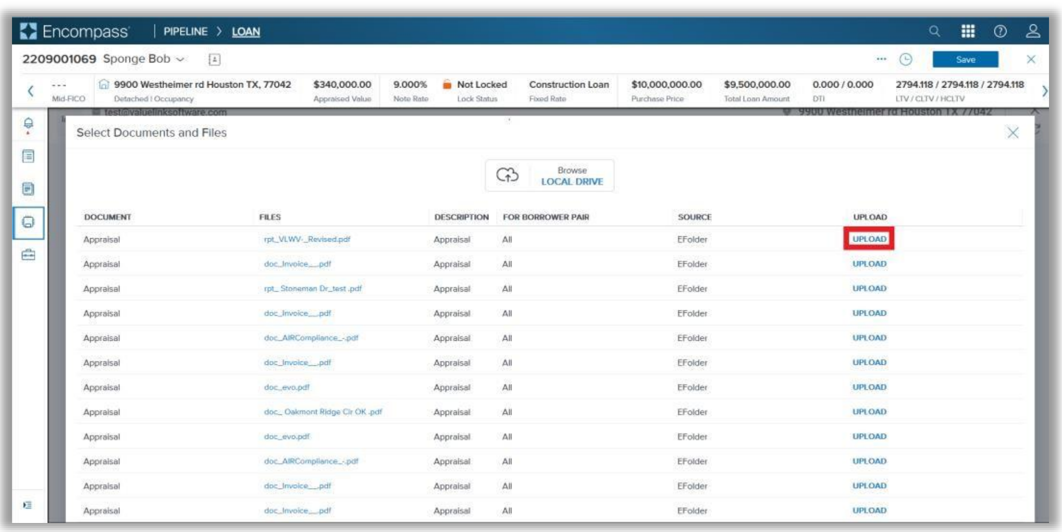
1) **Order Details**

   Select the **Order Type Group, Order Type, Branch, Loan Type, Product, Order Due date or any additional rush products (**if required**)**



2) **Documents**

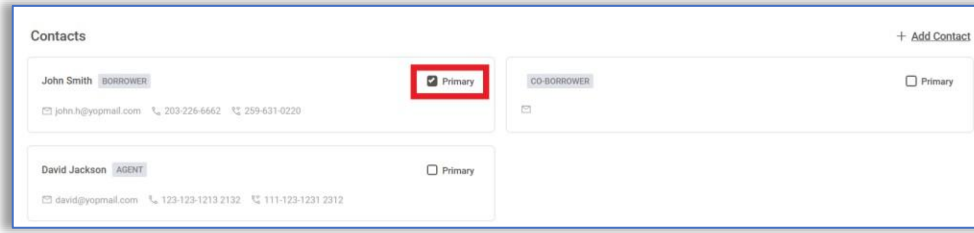
   Click on the "Upload Documents" button to upload documents. You can upload Documents from the E-folder or by browsing your Local PC



Once you select the document, you can select the **Document Type** and attach it to the order.

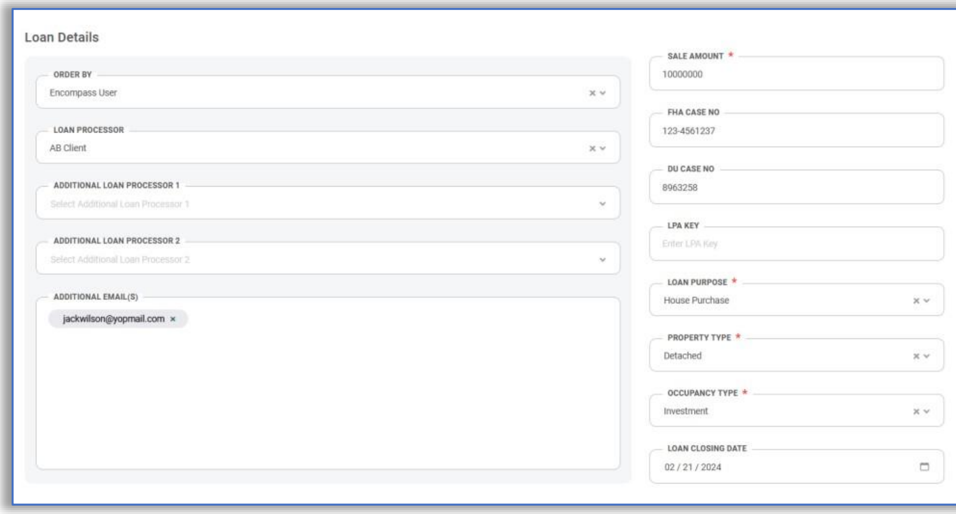
3) Contacts

Next, the contact section has data pre-populated from the loan file. Select a **Primary** contact. You can also add additional contacts by clicking on the "**Add Contact"** option.



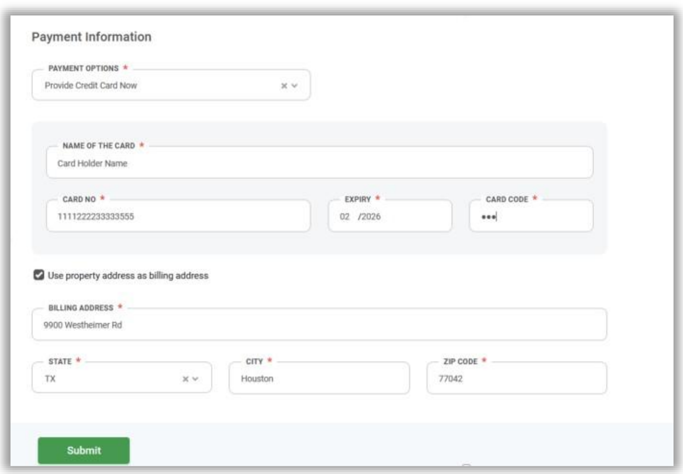
4) Loan Details

Most of the loan details are pre-populated from the loan file. Adjust or Add any additional details as required



5) Payment Details

Add payment details and you are ready to submit your order. Once you hit submit, you will receive a confirmation that the order was placed successfully.



View Order Screen

You can view your order for any updates, add documents, collect payments and share any updates. To view an existing order, follow the steps below:

- Go to your **Pipeline** and open a Loan
- Go to **Services → All Services** and open the **Appraisal** dropdown.
-