

Quick Guides – Admin Setup in Encompass Partner Connect[™]

Last Revised Date: 12/05/2024

1. Access Web Settings

There are two ways to access Web Settings. In EPC, select Admin from the waffle menu in the upper right corner.		1
In EMN, navigate to Encompass Settings. Click Web Version Settings .	Image: Secondary Setup Settings Overview Welc Settings Overview Settings Overview The features and tools on the Company Setup Investor Connect Setup Encompass - Web Version Settings Use eFolder Setup After Docs Setup Fai Secondary Setup Contact Setup Configuration	



MGIC

2. Setup Steps



You will be directed to the **Add Manual Setup** screen.

- a) Click the **Active** button to turn the service on.
- b) Enter a Service Setup Name.
- c) Click the Add button to open the Add Entities window.
- d) Once you've mapped users and closed the Add Entities window you will be returned to this screen. Click Save.

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In the **Add Entities** window, select the user(s) you want to map from the **Category / Users** column and move them to the **Selected Users** column by clicking the **Arrow** icon. Click **Add**.

You will be returned to the **Add Manual Setup** screen. As stated in the previous step, you will need to click the **Save** button on that screen.

Note – If you need to remove a user from the **Selected Users** column, click the **X** button next to their name and they will be moved back to the **Category / Users** column.

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Brian Maddan (hmaddan)		*	(a) Mary K Adler (mary)	۰	
Ann Dev (enndev/l)	_		 Jim Bertz (jimbertz) 	•	
Anusha Gundu (anusha)	-		 (a) Evelyne Nimmo (evelyne) 	۰	
Antonia Ganas (anthony)	-		(a) Lee Swanson (Iswanson)	•	
Andree Hurlock (endree)	-		 (arry Tran (larry) 	•	
Alexis Panaro (alexis)			(a) Leslie Bensen (leslie)	•	
Mike Mueller (admin)	-				
Accounting User (accounting)		Ţ			
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On the MGIC Mortgage Insurance Service Setups screen, click the **Credentials** button.

The Add Company Credentials window will open. Enter your MGIC **Master Policy Number** and a **Master Policy Number Description**. Click **Save**.

Add Company Credentials	×
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Master Policy Number Description *	_

3. Admin Settings

From within a loan, go to the **MGIC: New Order** or **MGIC: Edit Order** screen. Click the **Settings** link in the upper right corner.

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The **Admin Settings** window will open. Setting options are available for the following categories:

- Branches
- Premium, Refund and Renewal Options
- Premium Payment Plan
- Persona Ordering Permissions
- MI Coverage Percentage

Adjust the settings as applicable to add/edit/remove options as well as set default values.

Once you have adjusted the settings, click **Save**.

Note – Though these settings are accessed within a loan, they are global settings.

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4. Rate Quote Comparison Settings



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Note – Though these settings are accessed within a loan, they are global settings.



5. Setting MI Center Persona Permissions in EMN

