Quick Guides – Admin Setup in Encompass Partner Connect™

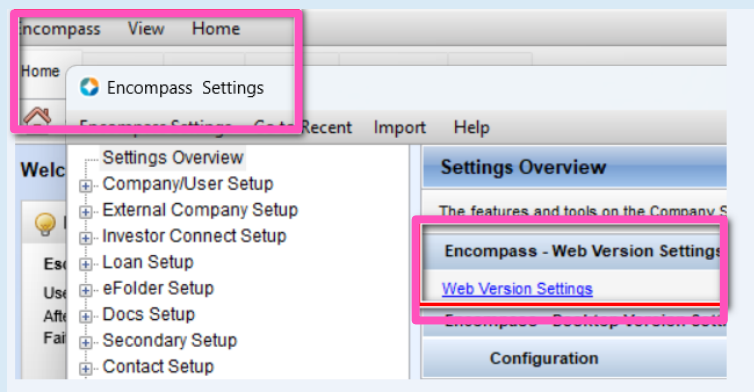Last Revised Date: 12/05/2024

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.	
In EMN, navigate to **Encompass Settings**. Click **Web Version Settings**.	

Contacts: MGIC Integration Services
Integration_services@mgic.com 1-888-644-2334

Your MGIC Representative
mgic.com/contact

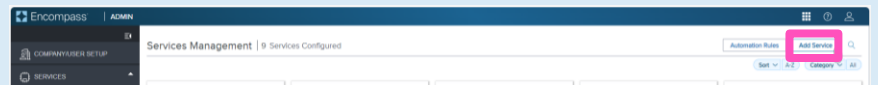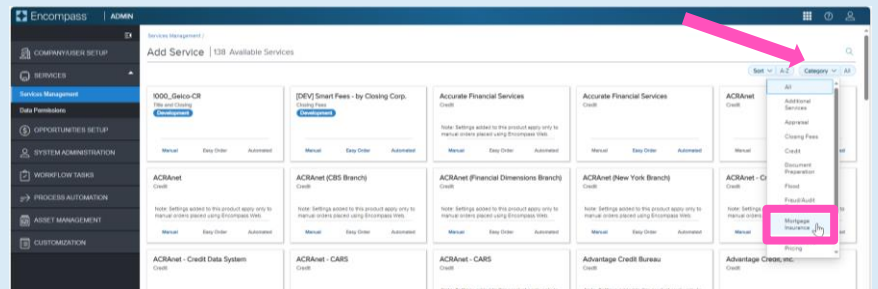#24-18106
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2. Setup Steps

On the **Admin** screen, open the **Services** menu and select **Services Management**.
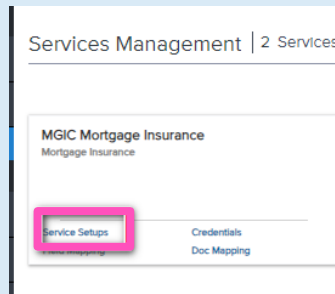
Select **Add Service**.

Select **Mortgage Insurance** from the **Category** drop-down list.

Select **MGIC Mortgage Insurance**, click **Service Setups** and click **Add**.

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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.**

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.

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.**

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.

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.
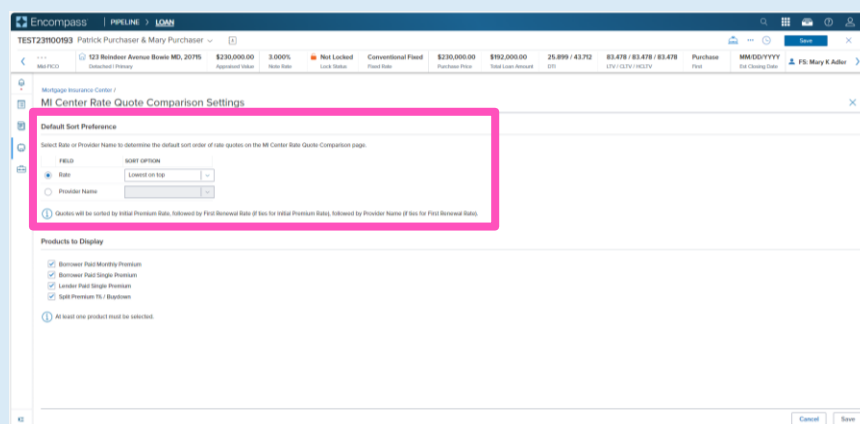
4. Rate Quote Comparison Settings

From within a loan, click the **MI Center Settings** link in the upper right corner.
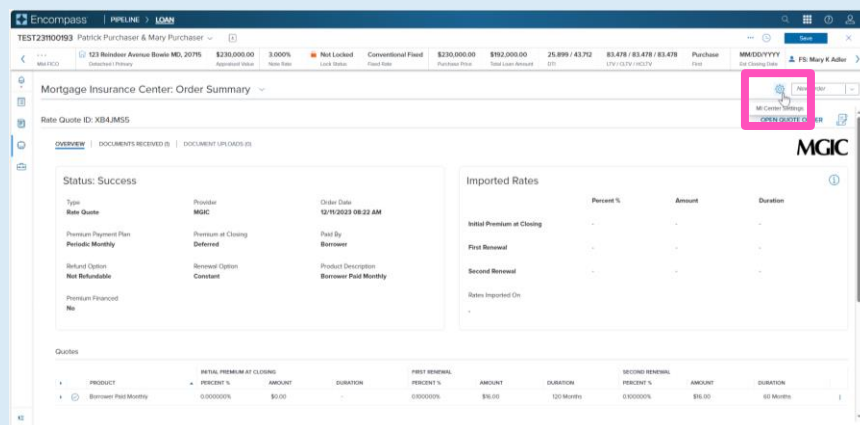
The **MI Center Rate Quote Comparison Settings** screen will open.

The **Default Sort Preference** will control the Rate Quote Comparison display order. You may choose to sort by **Rate** or **Provider Name**.

To sort by rate, click the radio button next to the **Rate** field. You may select to sort by **Lowest on top** or **Highest on top**.

Note – When sorting by rate, quotes will display in order by Initial Premium Rate. In the event of an Initial Premium Rate tie, the next sort will be by First Renewal Rate. In the event of a First Renewal Rate tie, the final sort will be by Provider Name.
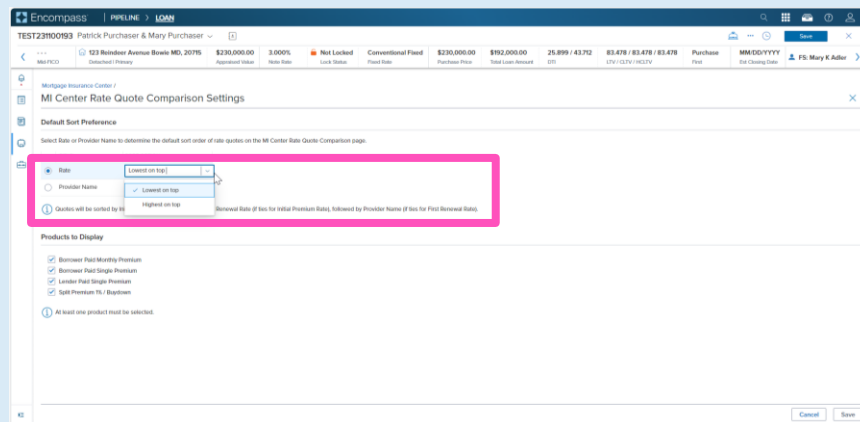
To sort by provider, click the radio button next to the **Provider Name** field. You may select to sort by **A to Z** or **Z to A**.

Note – When sorting by provider, no secondary sort is necessary as ties are not possible.

The **Products to Display** setting will control the products displayed for a Rate Quote Comparison order. Click the appropriate check box for the products you would like to add to, or remove from, the Rate Quote Comparison.

Note – The **Order Summary** screen will also only include the products configured to display.
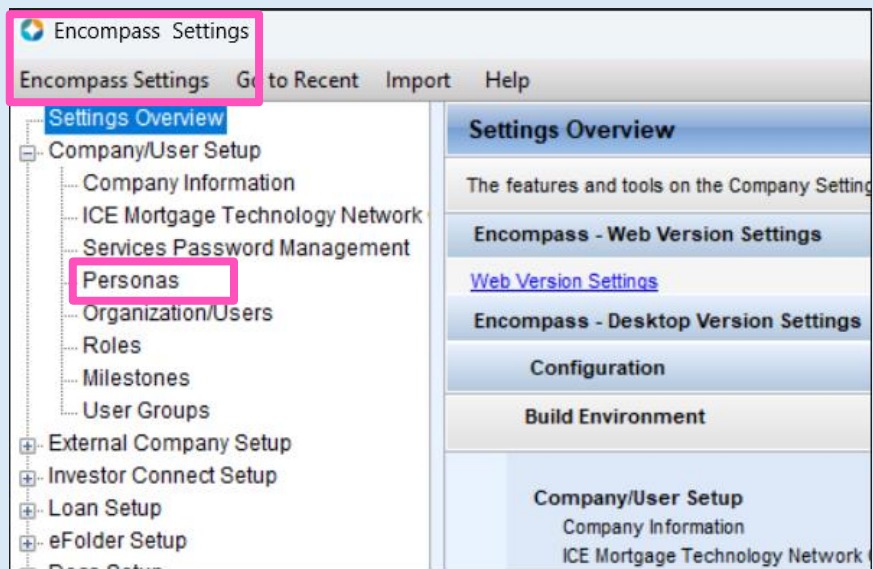
Once you have adjusted the settings, click **Save**.

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

5. Setting MI Center Persona Permissions in EMN	
In EMN, navigate to **Encompass Settings.** Click **Personas.** Note, Personas created as 'All Access' persona will have the boxes all checked by default. Personas created as 'No Access' will be unchecked by default, and you will need to select the permissions.	
In **Create a persona,** select your persona. Click **Web Version.**	
In **Standard Features,** select **MI Center.** Select the appropriate permissions for the persona Click **Save.** **Note, you will need to update MI Center permissions by Persona.**	