

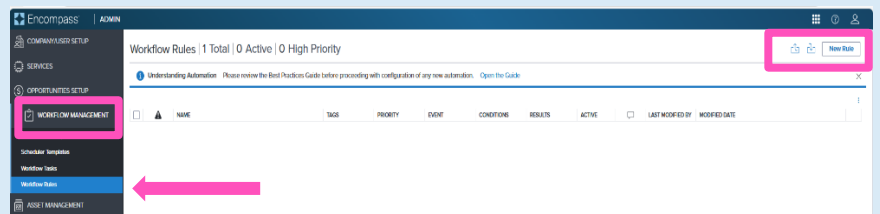
Quick Guides – Automate MI Activation through Encompass Partner Connect™

Last Revised Date: 09/23/2025

1. Automate Activation

In Admin Settings, navigate to **Workflow Management**.

Select **Workflow Rules**. Click **New Rule**.

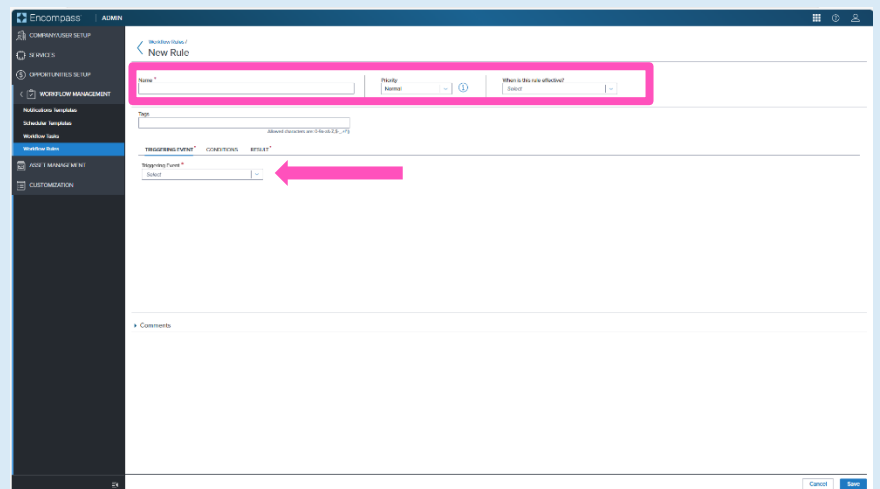


The **New Rules** screen displays.

Enter the following information:

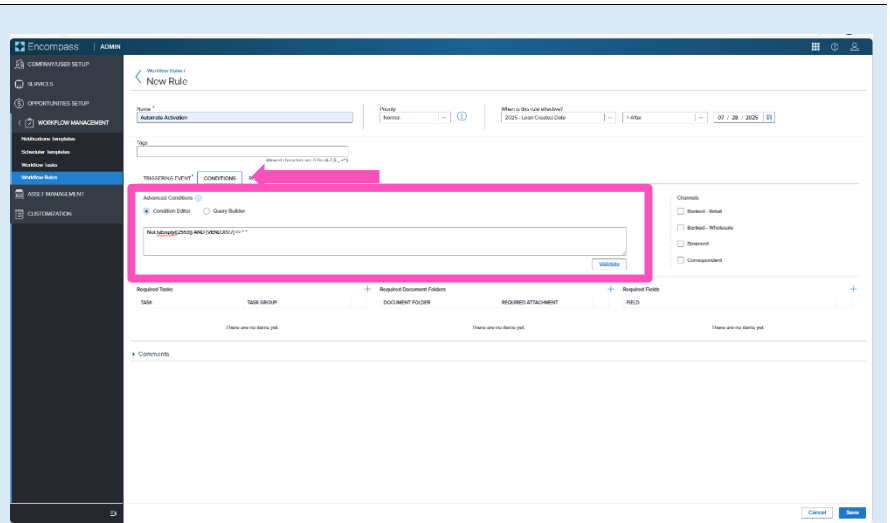
- **Name**
- **Priority**
- **When is this rule effective?**

Select a **Triggering Event** from the drop-down.



Click **Conditions**.

Select either **Condition Editor** or **Query Builder** to enter rule logic.



Click **Result**.

In the **Resulting action** drop-down, select **Update Service Order**.

In the **Service Category** drop-down, select **Mortgage Insurance**.

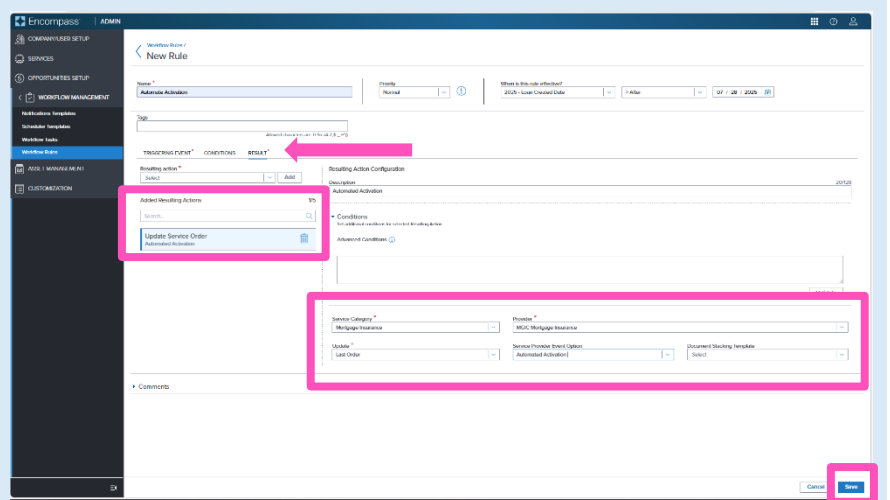
In the **Provider** drop-down, select **MGIC Mortgage Insurance**.

In the **Update** drop-down, select **Last Order**.

In the **Service Provider Event Option**, select **Automated Activation**.

Leave **Document Stacking Template** blank.

Click **Save**.



Click **Active** toggle button to **On**.

