GET CONNECTED

Quick Guides – Automate Upload of Post–close Documents through Encompass Partner Connect™

Last Revised Date: 09/23/2025

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1. Automate Upload of Post-close Documents	
In Admin Settings, navigate to **Workflow Management.** Select **Workflow Rules** and 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.	
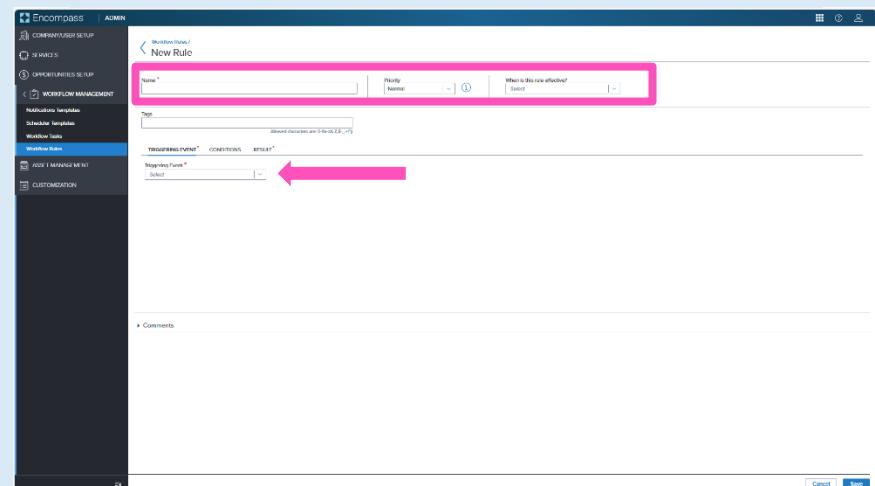
Click **Conditions.**

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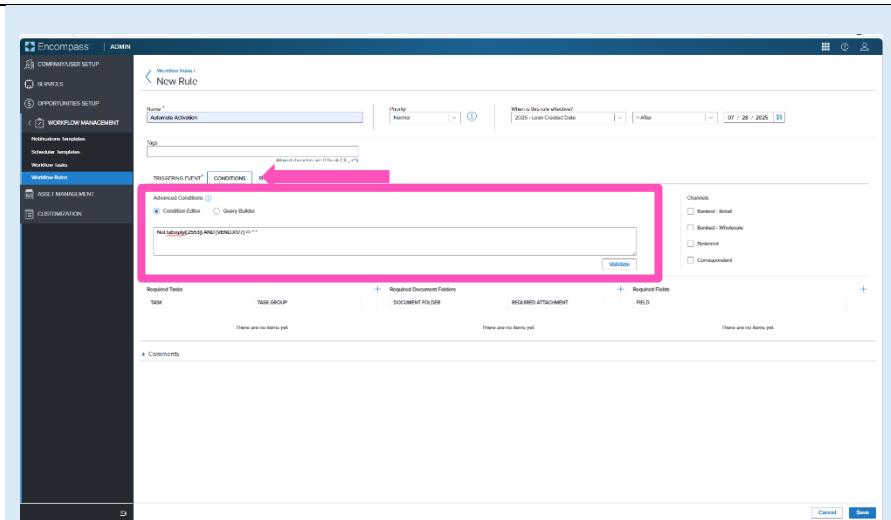
Click **Result.**

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, selelct **Last Order.**

In the **Service Provider Event Option,** select **AutomatedPostClosingDocuments.**

In the **Document Stacking Template,** select **MGIC Stacking Template**.

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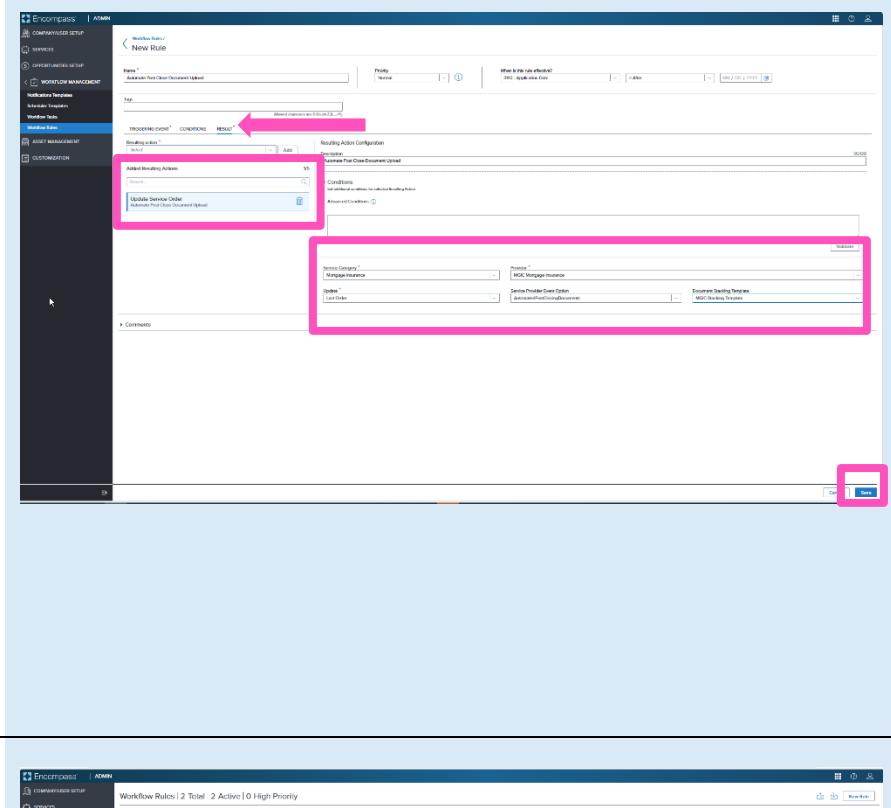
Click **Active** toggle button to **On.**