

# GET CONNECTED

MGIC

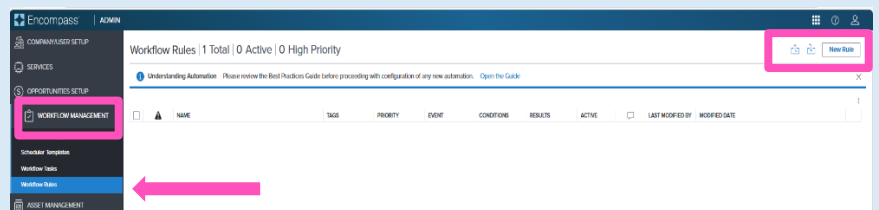
## Quick Guides – Automate Upload of Post-close Documents through Encompass Partner Connect™

Last Revised Date: 09/23/2025

### 1. Automate Upload of Post-close Documents

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

Select **Workflow Rules** and click **New Rule**.

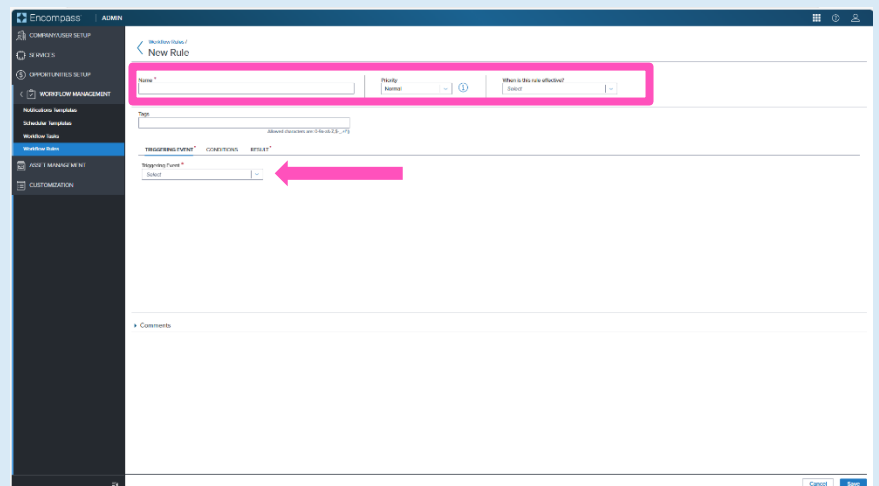


The **New Rules** screen displays.

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.

The screenshot shows the 'New Rule' configuration page in the Encompass system. The 'Conditions' tab is selected, and the 'Condition Editor' is active. A pink box highlights the 'Condition Editor' area, and a pink arrow points to the 'Conditions' tab. The 'Result' tab is also visible.

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 **AutomatedPostClosingDocuments**.

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

Click **Save**.

The screenshot shows the 'New Rule' configuration page in the Encompass system. The 'Result' tab is selected, and the 'Update Service Order' action is configured. A pink box highlights the 'Update Service Order' action, and a pink arrow points to the 'Result' tab. The 'Conditions' tab is also visible.

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

The screenshot shows the 'Workflow Rules' page in the Encompass system. The 'Active' toggle button is highlighted with a pink box, and the 'On' position is selected.