

# GET CONNECTED



## Total Quality Loan<sup>®</sup> (TQL<sup>®</sup>) program by ICE Mortgage Technology<sup>™</sup>

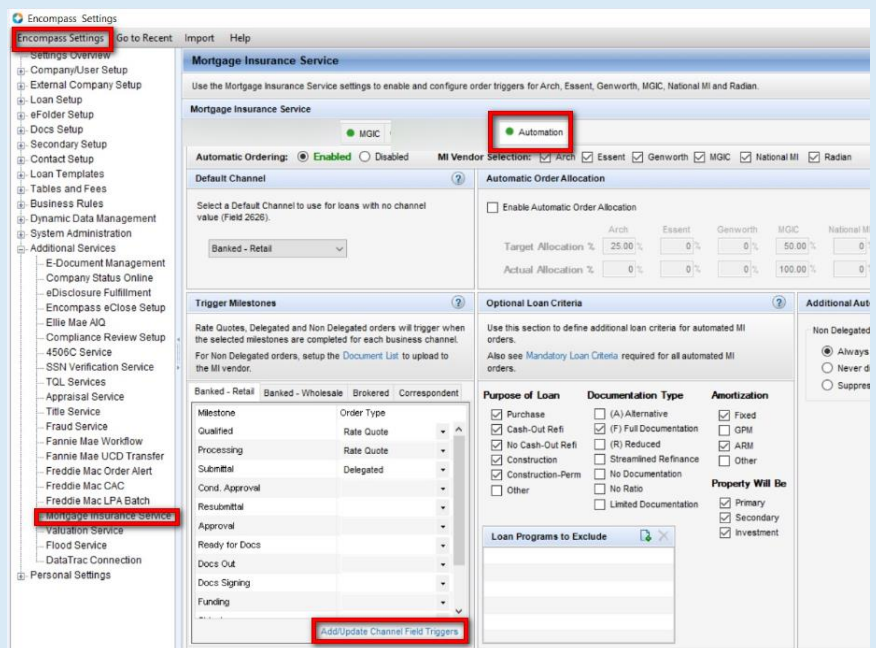
### TQL – Add/Update Channel Field Triggers

#### 1. Add Channel Field Triggers

To add Channel Field Triggers in TQL, navigate to **Encompass Setting > Additional Services > Mortgage Insurance Service**.

Select **Automation**.

Select **Add/Update Channel Field Triggers** in the **Trigger Milestones** section.



The screenshot shows the Encompass Settings application. The left sidebar contains a navigation tree with 'Mortgage Insurance Service' highlighted. The main content area is titled 'Mortgage Insurance Service' and includes several sections: 'Automatic Ordering' (with 'Enabled' selected), 'MI Vendor Selection' (with 'Arch', 'Essent', 'Genworth', 'MGIC', 'National MI', and 'Radian' all checked), 'Default Channel' (set to 'Banked - Retail'), 'Automatic Order Allocation' (with a table for Target and Actual Allocation percentages), 'Trigger Milestones' (a table with columns for Milestone and Order Type), 'Optional Loan Criteria', and 'Additional Auth'. The 'Automation' checkbox is highlighted with a red box. In the 'Trigger Milestones' section, the 'Add/Update Channel Field Triggers' link is highlighted with a red box.

Milestone	Order Type
Qualified	Rate Quote
Processing	Rate Quote
Submittal	Delegated
Cond. Approval	
Resubmittal	
Approval	
Ready for Docs	
Docs Out	
Docs Signing	
Funding	

## 2. Select Add icon

The **Add New Field Trigger** box displays.

Enter the appropriate **Encompass Field ID** and click **OK**.

Repeat the process for each field you want to add.

Recommended fields to add:

- **Bankruptcy**
  - Borrower Field - 265
  - Coborrower Field - 1108
- **County - Field ID - 13**
- **First Time Homebuyer**
  - Borrower Field - 403
  - Coborrower Field - 1108
- **Foreclosure**
  - Borrower Fields:
    - URLA.X102, URLA.X104, URLA.X106
  - Coborrower Fields:
    - URLA.X103, URLA.X105, URLA.X107
- **Self Employed**
  - Borrower Field - BE0015
  - Coborrower Field - CE0015

Click **OK** at the bottom of the screen when finished.

**Note:** You will need to save your changes and restart Encompass for the changes to be in place.

