MASTERING ENCOMPASS®

TRAINING FOR ADMINS & USERS

HIGHLIGHTS:

- Mastering Encompass® Certification for Admins & Users
- Mastering Encompass® Web Essentials

A MESSAGE
FROM YOUR INSTRUCTOR

EDUCATION IS EVERYTHING...

Encompass® is not something you learn best through osmosis or even haphazard experiences over time. The most proficient administrators and users are those taught by the most skilled teachers. Education never ends, which is why training is always needed.

"

The only constant in the mortgage industry is change. The Encompass platform is no different. Access to the best information and the most current lessons is critical to achieving the best outcomes.

"

About Larry Bailey

With over 30 years in mortgage banking and teaching others how to best use the Encompass platform since 2011, you won't find a more qualified and knowledgeable instructor.

Larry Bailey
Founder & CEO of
Mortgage Workflow Partners Inc.

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ADMINS & USERS MASTERING ENCOMPASS® CERTIFICATION COURSE

ADMINS & USERS
MASTERING ENCOMPASS®

Mastering Encompass® Certification for Admins and Users includes over 100 hours of live training, with all lessons recorded and available for your review. Live training is available up to five days per week throughout the year. AMA (Ask Me Anything) live calls are held from 12-12:30 PM ET on Mondays and Fridays. Admin-focused live calls are held from 2-3 PM ET on Tuesdays and Thursdays, along with User-focused live calls on Wednesdays from 2-3 PM ET.

AS AN ADMIN, LEARN ALL SETTINGS IN:

- **Encompass® Desktop and Encompass® Web**
- **Input Form Builder for Encompass® Desktop and Encompass® Web**
- **Encompass® Consumer Connect® and TPO Connect®**
- **Encompass® Admin Tools**

AS A USER, LEARN ENCOMPASS® BEST PRACTICES FOR YOUR ROLE:

- **Loan Officer**
- **Loan Processor**
- **Underwriter**
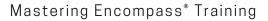- **Lock Desk / Secondary**
- **Closer**
- **Manager**

COURSE **BENEFITS**

HERE ARE JUST A FEW GREAT BENEFITS:

- Mastering Encompass® Certified Admin and/or User after passing your Final Exam
- Live Admin classes throughout each week to teach you every setting and all Best Practices in the Encompass® platform
- Direct Chat and Q&A Help
- Library of Premium Encompass® Support Resources
- Library of Premium Encompass® Support Videos
- Dedicated Individual Encompass® Support
- Community Chat and Q&A Help
- Library of Community Encompass® Support Videos
- Monday and Friday Mastering Encompass® Open Q&A Calls
- Tuesday Encompass® Open Community Calls
- Access to the Mastering Encompass® Admin Certification space
- Access to the Mastering Encompass® User Certification space
- Project Tracking Software Licensing
- Free Encompass® Community Resources

You will be taught Best Practices of how to master your Encompass® platform. Your knowledge will be tested throughout your enrollment to ensure you learn as you go. If you do not have access to an Encompass® environment, you will be given access during the course.

MASTERING ENCOMPASS®
CERTIFICATION
ADMIN LESSONS

- Important Admin Resources
- Resources to help with Coding, Business Rules, and Custom Input Forms
- Encompass® Admin Tools
- Company / User Setup
- External Company Setup
- Investor Connect Settings
- Loan Setup
- eFolder Setup
- Docs Setup
- Secondary Setup
- Contact Setup
- Loan Templates
- Tables and Fees
- Business Rules
- Dynamic Data Management
- System Administration
- Additional Services
- Personal Settings
- Desktop Input Form Builder
- Encompass® Web Version Settings
- Encompass® Web Version Input Form Builder
- Consumer Connect
- TPO Connect

MASTERING ENCOMPASS®
CERTIFICATION
USER LESSONS

- Lessons for Loan Officers
- Lessons for Loan Processors
- Lessons for Underwriters
- Lessons for Lock Desk / Secondary
- Lessons for Closers
- Lessons for Managers
- Pipeline Views - Basics to Advanced
- Dashboards - Basics to Advanced
- Reports - Basics to Advanced
- Starting out with New Loans
- Input Forms and Tools Explained
- eFolder, eConsent & eDisclosures
- Consumer Connect Best Practices
- Pricing and Running AUS
- Using Encompass® on the Web to Manage Opportunities and Scenarios

WHAT WILL YOU
NEED FOR CLASS

- Your computer/laptop, one per registrant
- A working microphone
- Access to two monitors, if possible, to eliminate the need to toggle between screens
- Access to Encompass®, or use our testing environment as needed.

INVESTMENT

Everything listed is yours for an investment of $2500 per year per student. If you wish to enroll more than one student at once, there are discounts to make your investment as low as $25 per month per student. These prices reflect discounts made to companies who are currently using Encompass® for their LOS in their mortgage operations.

ENCOMPASS® WEB ESSENTIALS COURSE

ENCOMPASS® WEB ESSENTIALS
DESCRIPTION

Below is a list of all the sections and lessons you will have access to. Your access includes everything below, along with live training throughout the month, which you will have access to for as long as you like.

- What is Encompass® Web, and How is it different from Desktop?
    - Explaining what Encompass® Web is all about
    - Why do we still need Encompass® Desktop?
    - What are the Key Differences between Web and Desktop?
    - Why do we need to move to Encompass® Web at all?
- Exploring and Understanding Encompass® Web
    - Company/User Setup - LO eSign, Loan Summary Bar, Loan Left Navigation
    - Services - Services Management, Data Permissions
    - Opportunities Setup - Affordability Management, Eligibility Letters, Email Templates, Using Opportunities in Your Sales Team
    - Prospects
    - System Administration - Paired Devices
    - Workflow Tasks - Workspaces, Tasks, Global Task Settings
    - Process Automation - Workflow Rules
    - All about Enhanced Conditions
    - Asset Management - Image Library, JavaScript Files
    - Customization - Custom Forms, Custom Tools, Plugins

ENCOMPASS® WEB ESSENTIALS
DESCRIPTION CONT.

- First Steps with Encompass® Web
  - Figuring out Where to Start
  - Understanding Your Workflow on the Web
  - How are Your Vendors doing with EPC?
  - Understanding how Data is the True Key to Your Entire Workflow
- Using Encompass® Web Today in Your Operations
  - Why focus on Enhanced Conditions?
  - Task-based Workflows are All Around You
  - Taking Steps that are Small, Deliberate, and Part of the Plan
  - Think Like Your Team Members
- How to Convince Your Teams to Use Encompass® Web
  - How to Establish Value in Change
  - Showing is Proof
  - Build Raving Fans
  - Keep Learning from Others in the Community
- What's Next for Encompass® Web?
  - Updates to Encompass® Web are Continuing
  - ICE Mortgage Technology® wants you to see the Value of Encompass® Web
  - The Goal is Partity+ and Then Some
- Are you Encompass® Web Ready?

ENCOMPASS® WEB ESSENTIALS

COURSE BENEFITS

- Recorded lessons
- Live training throughout each month
- Learn everything you need to know quickly

INVESTMENT

Everything listed is included for an investment of $499 per student with no course time limits. Discounts are available for enrolling more than one student per company simultaneously. Ask for more information.

TESTIMONIALS

Jeff H. ★★★★★

"...the courses allow you to choose between archived classes, which allow you to learn at your own rhythm, or live sessions held throughout the week.

Larry, the instructor, is a standout feature of the program. His extensive experience and expertise are evident in every session. What sets Larry apart is his willingness to answer questions, delve into detailed explanations, and even go off-topic to address specific administrative needs. His engaging teaching style and methodical presentation of material make complex concepts easier to grasp and apply."

Mike M. ★★★★★

"...not only did I become proficient in managing every Encompass setting, but I also acquired insights into best practices, identified existing deficiencies in our system, and learned how to effectively teach my coworkers to utilize Encompass to its fullest potential.

Larry's leadership and the engaging atmosphere of the Workflow Partners community made each class session something I eagerly anticipated..I am grateful for the opportunity to have been a part of this course and highly recommend it to anyone looking to optimize their use of Encompass and elevate their mortgage lending operations."

Amy B. ★★★★★

"I have been an Encompass Admin for 11 years, and I was expecting to learn a few things along the way, but not something in every class. Larry is a wonderful teacher and truly has a heart for educating all admins, no matter your level of experience. He explains the material in a way that is very easy to understand. I can't wait to finish the course and receive my Mastering Encompass® as an Administrator certification!"

Training People and Helping Companies Learn Everything about the Encompass® Platform since 2011

Our training, information, and approach have a proven and positive track record. Ask around, and you will not find a more comprehensive offering at a better value. We can help one person up to your entire company of thousands anywhere in the world. We believe in sharing the most effective ways to help you learn and master the Encompass® platform, regardless of your role.

STILL HAVE QUESTIONS?
CONTACT US AND ASK

We create lessons with the highest training standards and consistent updates to ensure you have everything you need to succeed. We help people and companies every day, and it is time for us to help you, too. Start today.

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