Velocify by Ellie Mae and Encompass Consumer Connect Integration Overview

Using Velocify's existing integration with Encompass, potential borrowers can seamlessly evolve from prospect to lead to applicant through the loan process. A strong integration between Encompass Consumer Connect, Velocify by Ellie Mae, and Encompass helps create a smooth experience for the borrower as well as the loan officer.

This document reviews how the integration works and how to set it up.

NOTE*: The workflow described in this document applies only to instances that have been configured for Encompass Consumer Connect, Velocify by Ellie Mae, and Encompass. Also, although the Lead Create feature is not a requirement for this integration, it is highly recommended and is required for certain key areas of the workflow.*

Overview

Only incomplete submissions are sent directly to Velocify from Encompass Consumer Connect. An Encompass Consumer Connect application is considered to be incomplete if the borrower has not clicked the **Submit** button. The Encompass Consumer Connect job runs on the hour, every hour. If the job runs after the borrower has submitted in Encompass Consumer Connect, the record will be created in Encompass.
If the borrower is actively engaged in the application process on the Encompass Consumer Connect website, but submits the application after a job has run, a record will be created in Velocify, although the application was completed in one session.

Borrowers must input at least their first name, last name, and either a phone number, email address, or current address in order to send their data to Velocify.

Data Flows

Potential borrowers accessing Encompass Consumer Connect conform to one of the following workflows:

- Complete and submit their application in a single session
- Start an application process and continue/complete later

Single Session

For borrowers who complete and submit their application in Encompass Consumer Connect in one session:

1. Application is started in Encompass Consumer Connect, with the borrower entering at least their first name, last name, and either a phone number, email address, or current address.
2. Application data is sent from Encompass Consumer Connect to Velocify and a record is created in Velocify, if the Encompass Consumer Connect job runs before the borrower submits.
3. Application is completed in Encompass Consumer Connect.

4. Application data is sent from Encompass Consumer Connect to Encompass.
5. Application data is sent from Encompass to Velocify to update the existing Velocify lead.

Multiple Sessions

For borrowers who start an application in Encompass Consumer Connect, abandon it (regardless of whether they are logged in or not), and complete it later:

1. Application is started in Encompass Consumer Connect, with the borrower inputting at least their first name, last name, and either a phone number, email address, or current address
2. Application data is sent from Encompass Consumer Connect to Velocify and a record is created in Velocify.
3. Application is abandoned by the borrower.
4. Velocify user engages with the borrower using Velocify's communication features.
5. The borrower completes the existing application or starts a new one in Encompass Consumer Connect.
6. Application data is sent from Encompass Consumer Connect to Encompass.
7. Application data is sent from Encompass to Velocify to update the Velocify lead.

Duplicate Management

Prior to the Encompass Consumer Connect integration, for instances with only Velocify and Encompass, you needed to export a lead from Velocify to Encompass. Once the export occurred and a loan was created in Encompass, all updates to the lead/borrower needed to be made in Encompass.

With the Encompass Consumer Connect integration, when instances have all three products (Encompass, Velocify, and Encompass Consumer Connect), you no longer need to manually export leads from Velocify to Encompass. The record is automatically pushed either from Encompass Consumer Connect to Encompass and then to Velocify (applications completed in a single attempt and submitted before the Encompass Consumer Connect job runs) or from Consumer Connect to Velocify (incomplete applications).

For scenarios where the borrower is actively engaged in the application process on the Encompass Consumer Connect website, but submits the application after a job has run, duplicate records for the borrower will be created in Velocify. One will be created when the job is run on Encompass Consumer Connect (while the borrower is completing the application) and the other when they submit (sending data to Encompass and then to Velocify).

Velocify's duplicate management merges the two lead records and the GUID from Encompass will be preserved on the merged lead so that all future updates to the lead will be made to the parent lead.

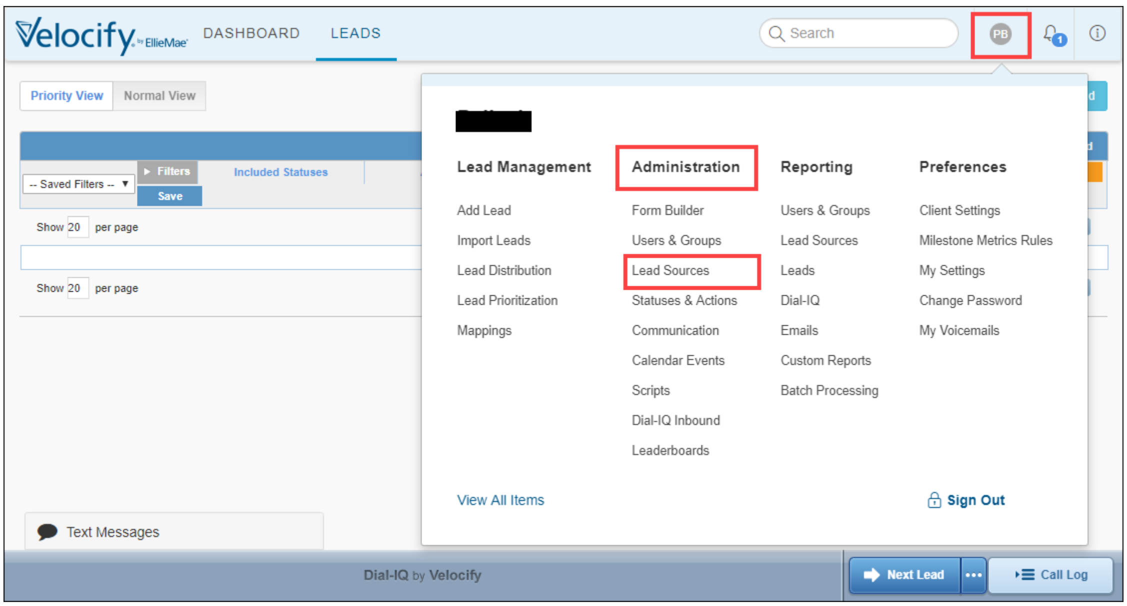
NOTE*: For more information on duplicate management, see Duplicate Management: Detailed Review.*

Configuration

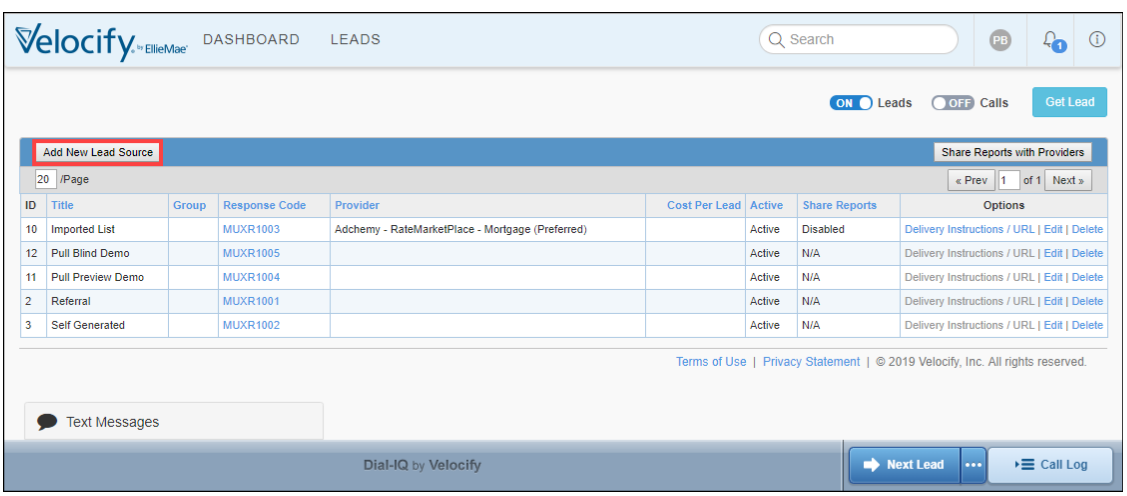
To enable the workflow between Encompass Consumer Connect and Velocify by Ellie Mae, the lead source ID from Velocify needs to be mapped to the Velocify Campaign ID field (for the relevant Loan App Workflow) in Encompass Consumer Connect.

To Set Up the Mapping between Encompass Consumer Connect and Velocify by Ellie Mae:

1. Identify the Velocify Lead Source ID in Velocify:
    a. Create a new lead source in Velocify for Encompass Consumer Connect.
    b. Access the Menu page by clicking on your name in the upper right of the header.
    c. Under **Administration**, click **Lead Sources**.

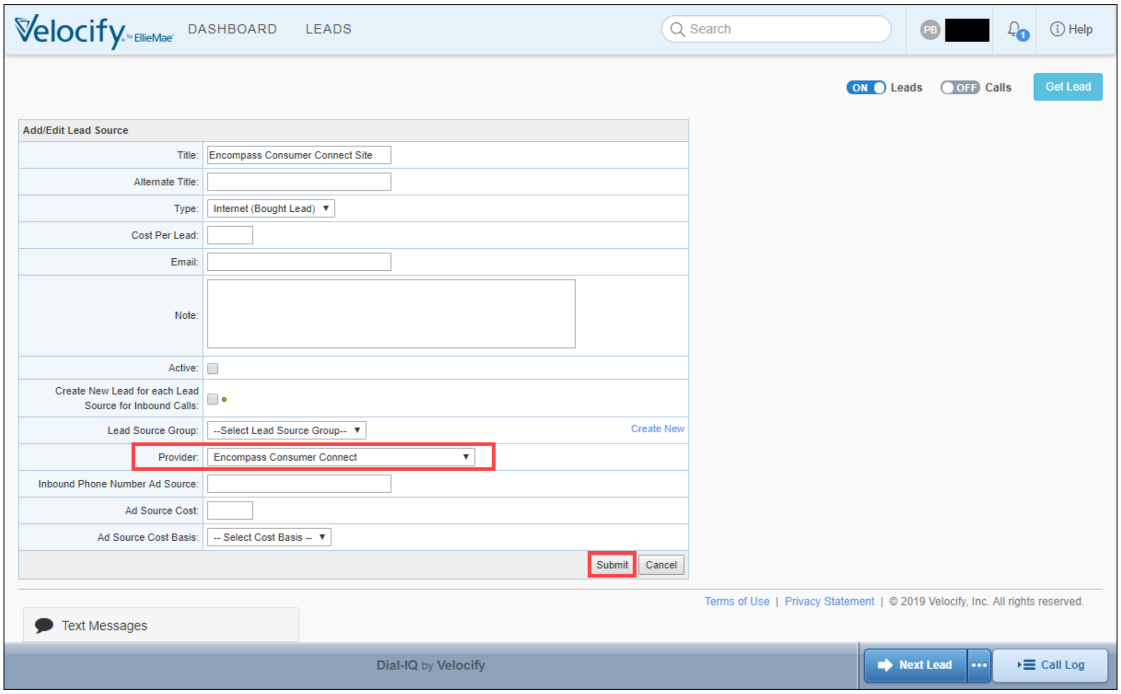


    d. Click the **Add New Lead Source** button.

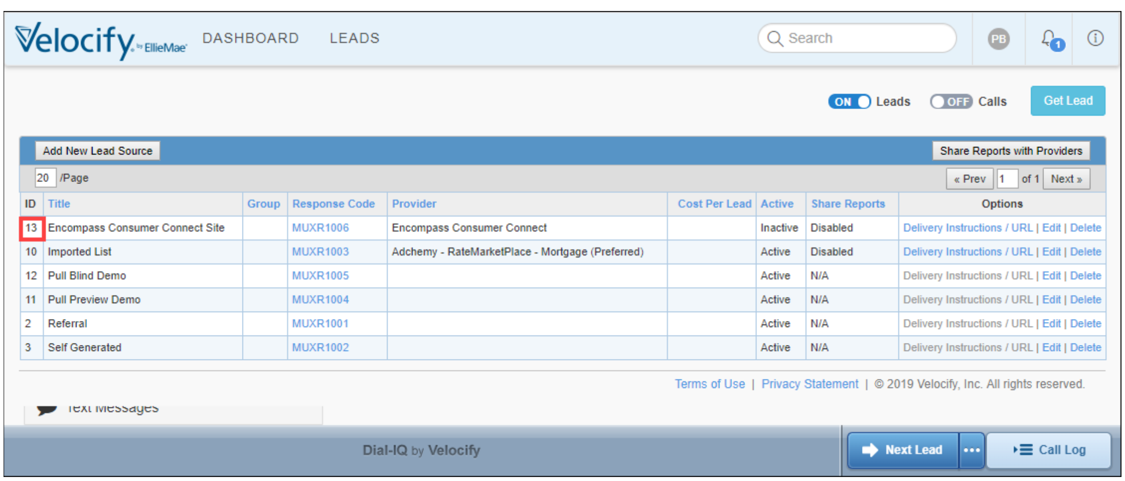


e. Input *Title* and select *Type*.

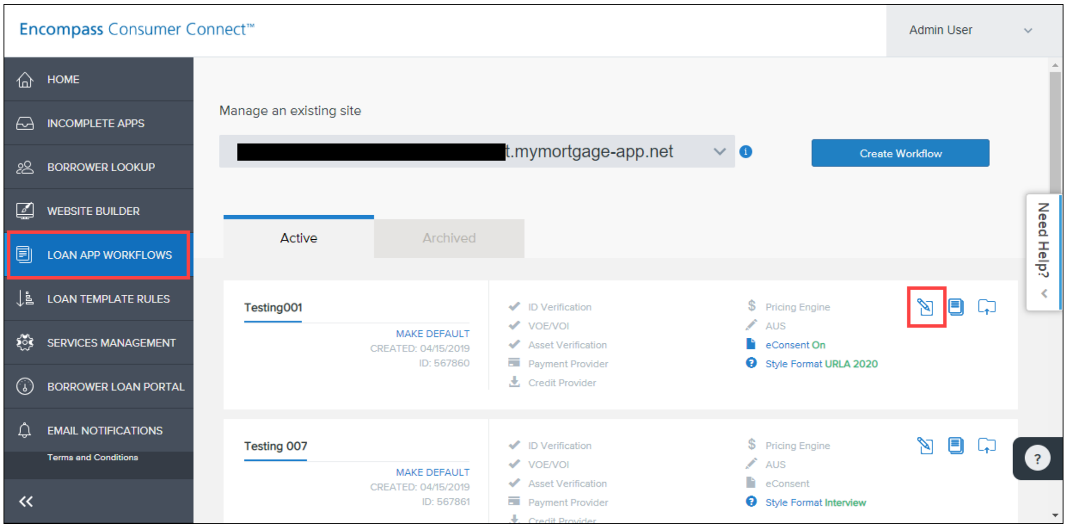
f. In the Provider drop-down menu, select **Encompass Consumer Connect**, and then click the **Submit** button.



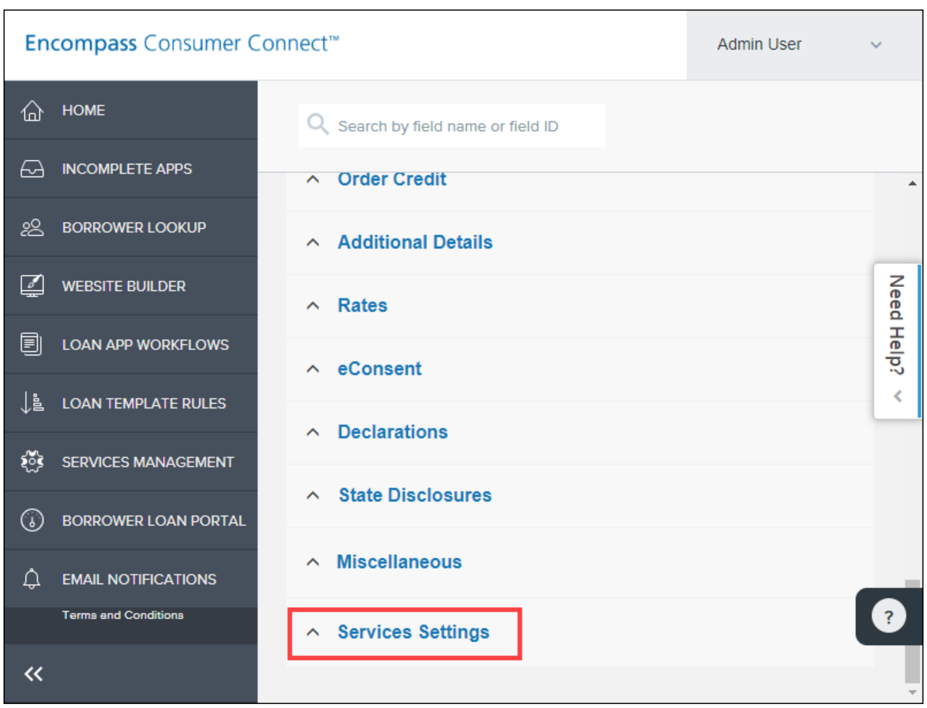
g. Back on the Lead Sources page, note the ID of the lead source you just created.



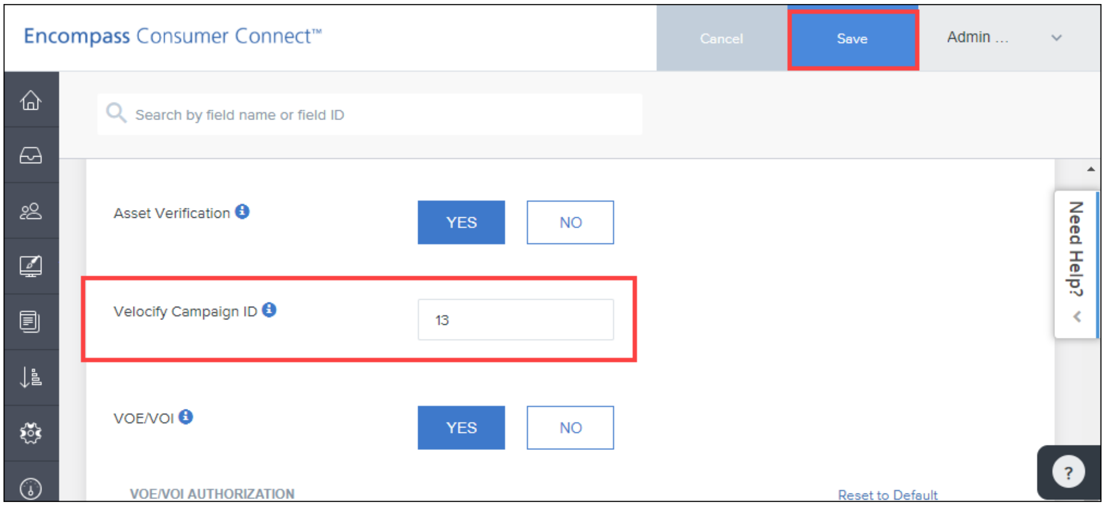
2. Pair your Encompass Consumer Connect site to Velocify:
    a. Log into Encompass Consumer Connect as an administrator, click **Loan App Workflows**, and click the **Edit** icon corresponding to the workflow you want to update.



    b. Scroll down to **Services Settings** and click to expand this panel.



c. In the Velocify Campaign ID field, type the Lead Source ID from Velocify.



d. Click **Save**.

3. To verify the success of your Encompass Consumer Connect and Velocify pairing, submit a test lead by starting an application on your Encompass Consumer Connect site and abandoning it after filling out first name, last name, and either a phone number, email address, or current address. Since Encompass Consumer Connect's job runs every hour, allow up to one hour for the data to display in Velocify.