

IDEA Link® Admin Guide

Version 1.0

September 10, 2026



Contents

Contents	2
Change History	2
Overview	3
Create IDEA Link® Service	4

Change History

Date	Change	Author
7/10/2026	Document creation	Krishan Sammi
8/26/2026	Incorporated the feedback from LoanLogics	Krishan Sammi
9/10/2026	Updated the screenshots (app name changed to IDEA Link)	Krishan Sammi

Overview

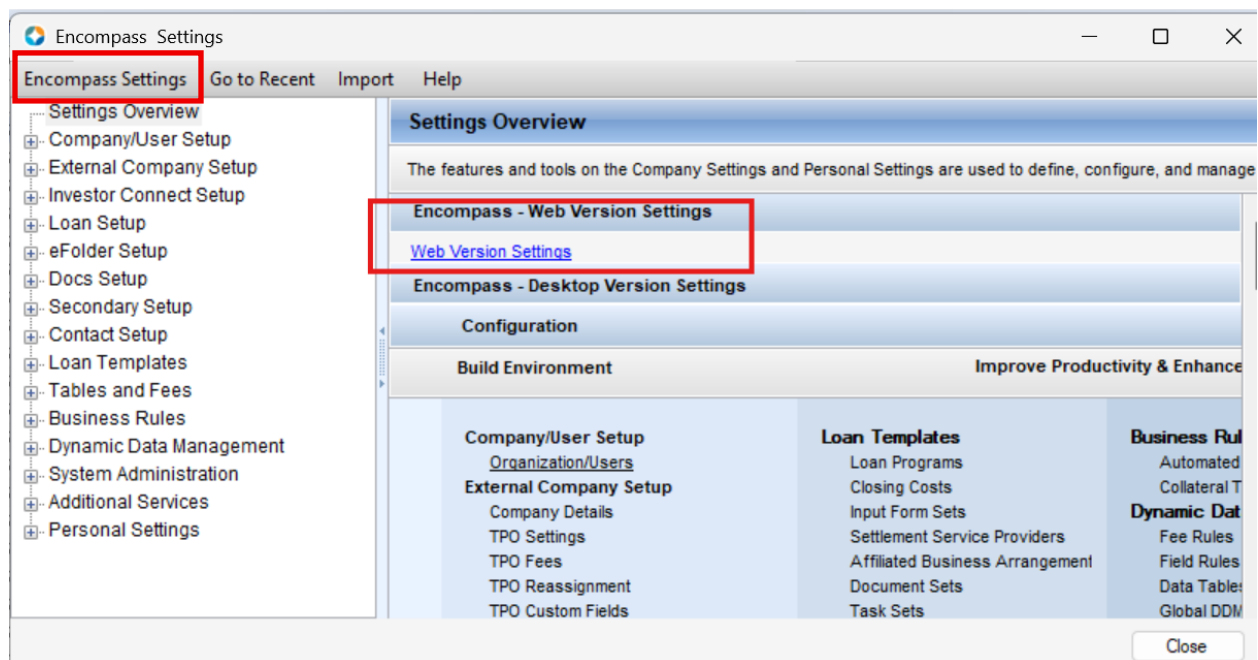
The “IDEA Link® Admin Guide provides information for setting up and configuring the Encompass platform to enable users to use IDEA Link® application. guidance on how to:

- Setup IDEA Link® service in Encompass
- Enabling users to use the application

This guide is intended for Encompass® users accessing the IDEA Link® application through the Encompass® Loan Origination System (LOS).

Note For Desktop (Smart Client) Users Only

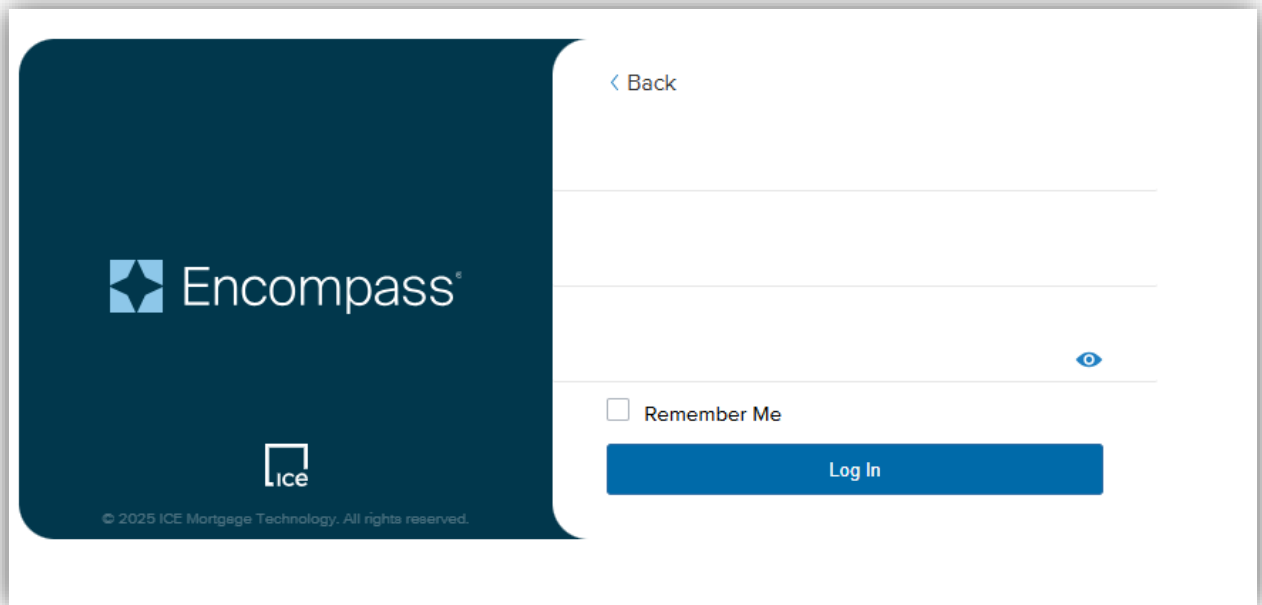
To use IDEA Link® through Encompass Desktop (Smart Client), you must complete a one-time process to enable the web-version settings. Click **Encompass Settings** then **Web Version Settings** to proceed.



Create IDEA Link® Service

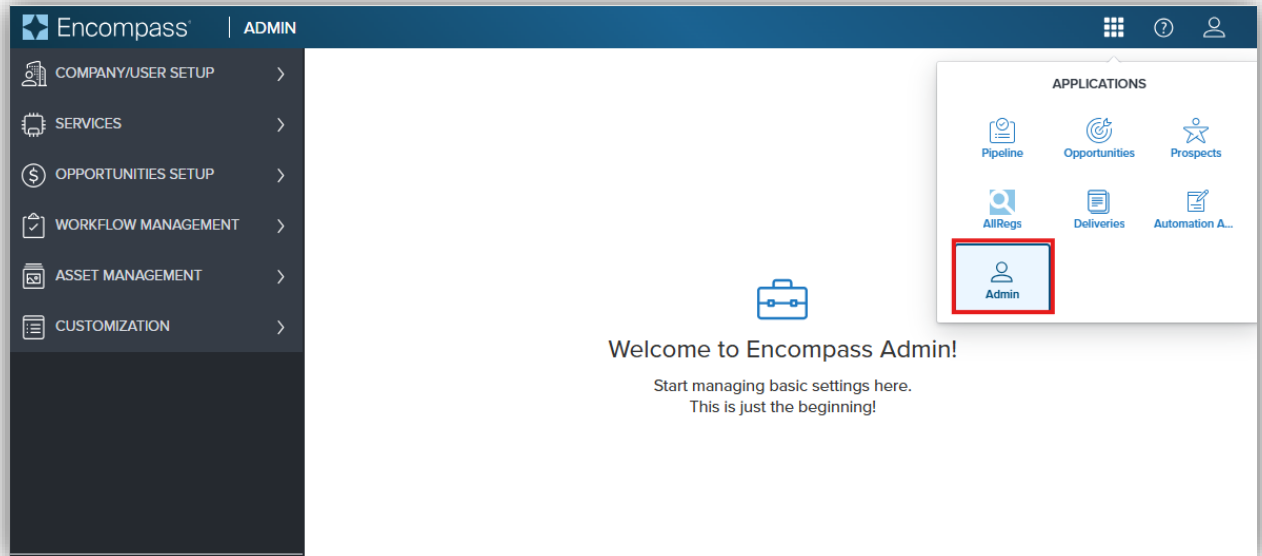
The **IDEA Link®** service will be available for Encompass Administrators to select from the pallet of Services. The service can be searched by name, partial name; It is created under **Additional Services** category. Here are step-by-step instructions:

1. Log in to Encompass EPC <https://encompassloconnect.com>

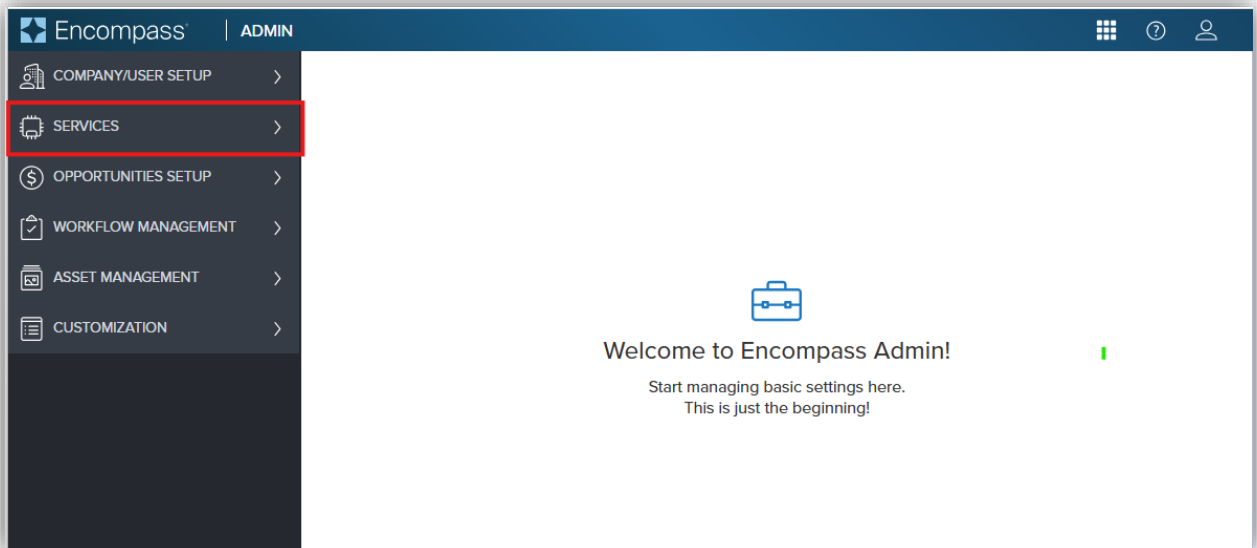


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2. Navigate to top right corner panel and click on “Admin” to launch Admin console.

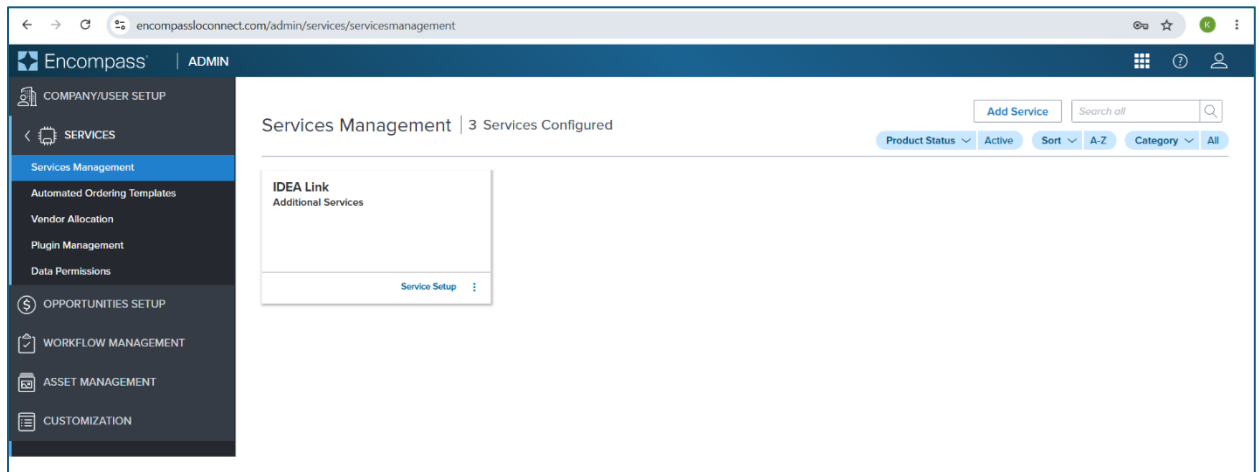


3. Navigate to panel on left side of screen and click on “Services.”



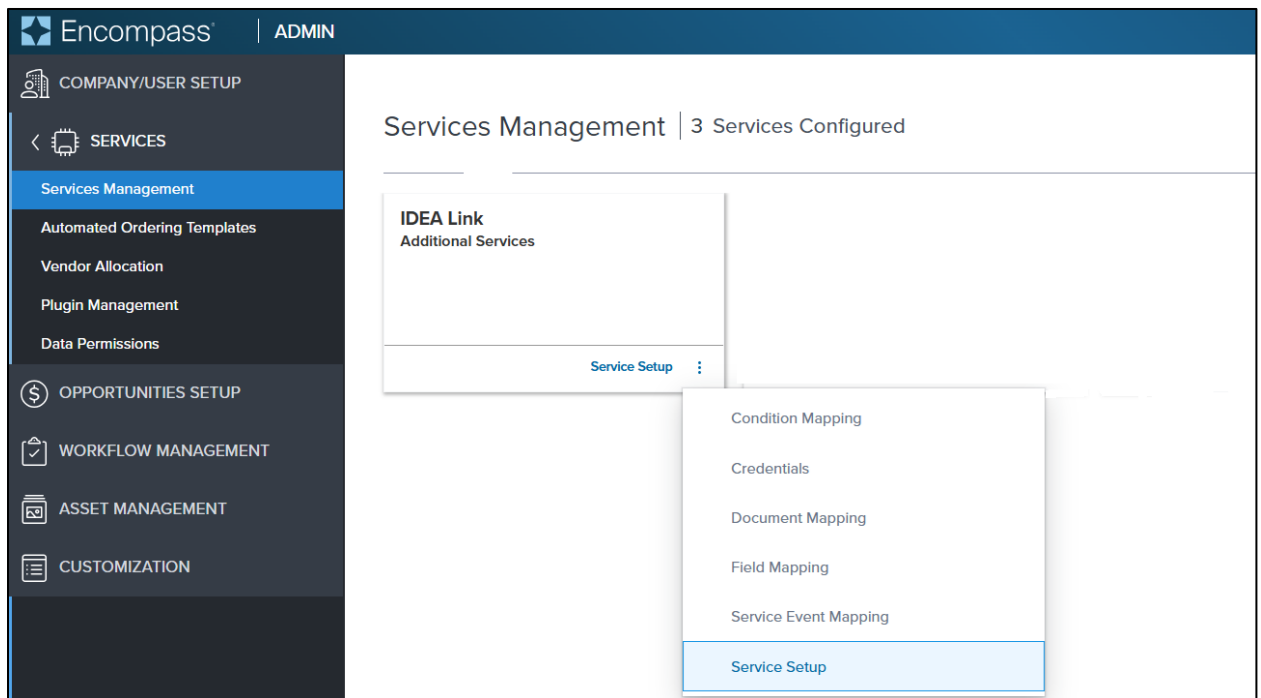
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4. Click on “Services Management” which is in the list under “Services.” This will launch the Services panel.

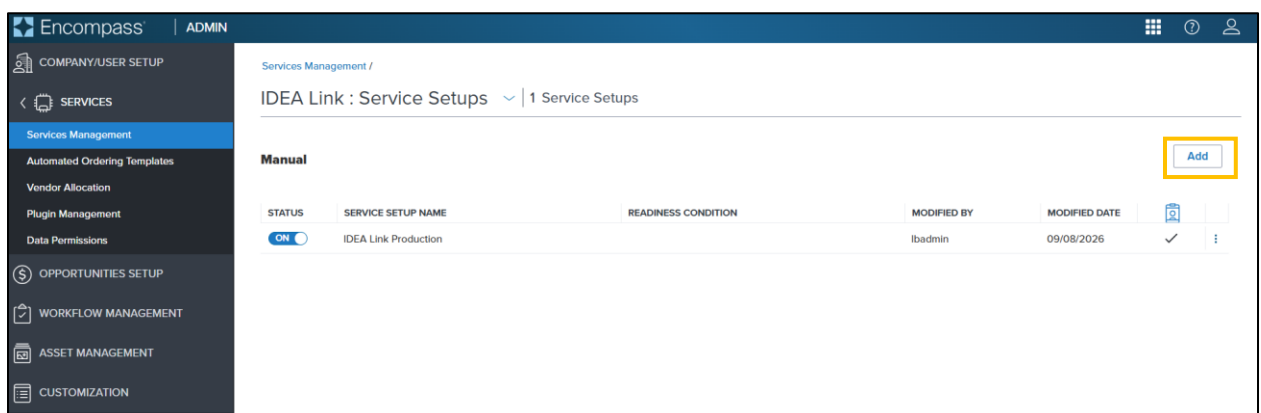


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- Click on the three vertical dots next to "Service Setup," then click on "Service Setup" from the dropdown menu.

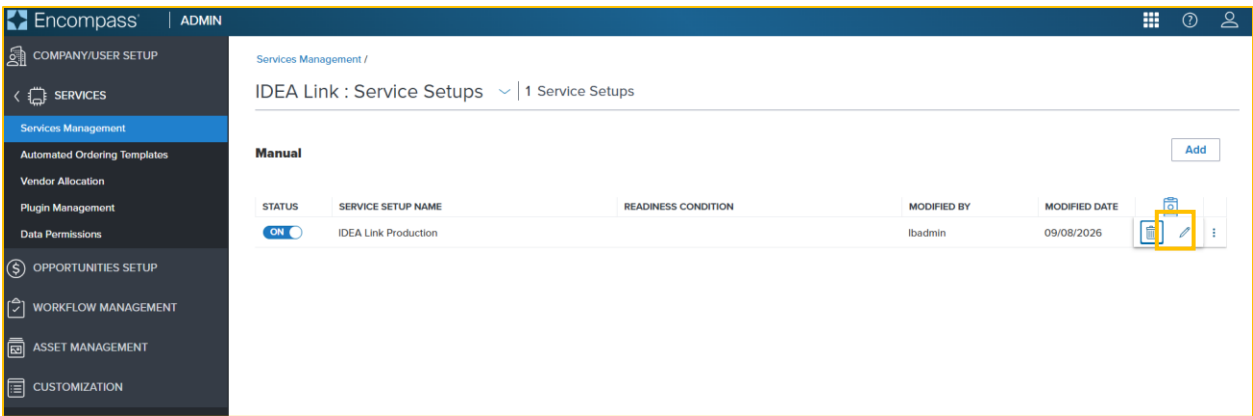


- Click on "Add" to add a new user to the related service.



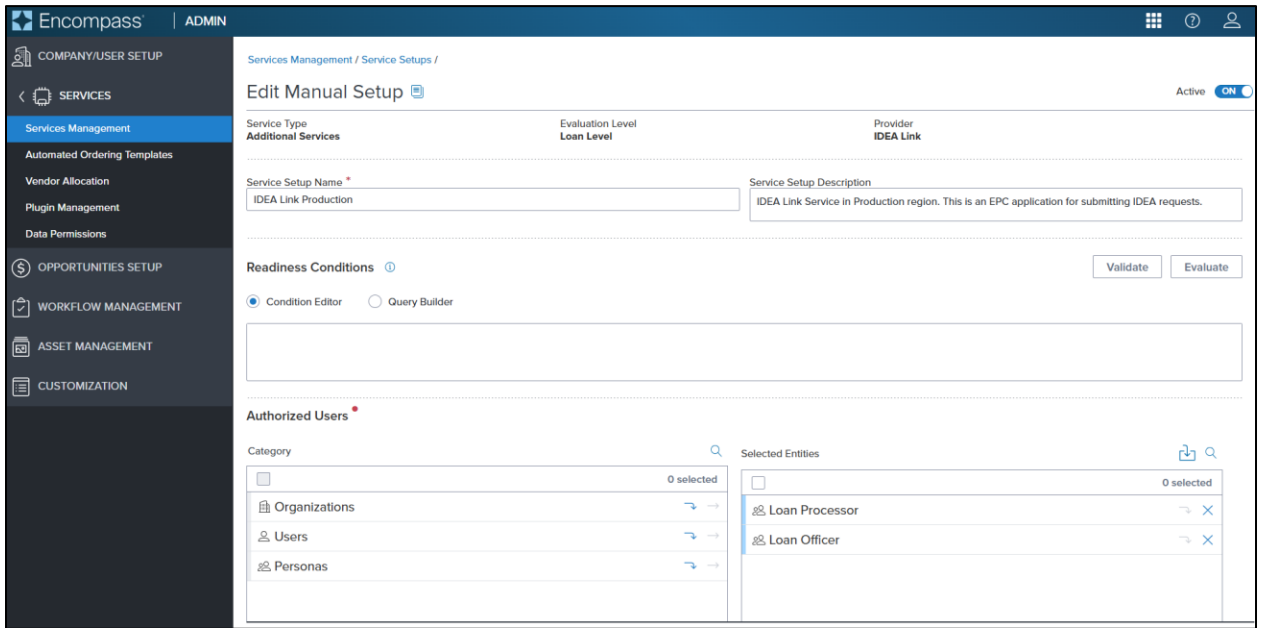
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7. If edits are required for an existing user, click on the Pencil icon.



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8. To add a new service or edit an existing service, the following information is needed:
 - a. Name of service
 - i. User discretion; Example: *IDEA Link®*
 - b. Description of service
 - i. Optional, but recommended; Example: *This service setup is for the Risk Management department.*
 - c. Select an individual or group that is authorized to use this service.
 - i. User discretion; Example: *Risk Group, or individual users*



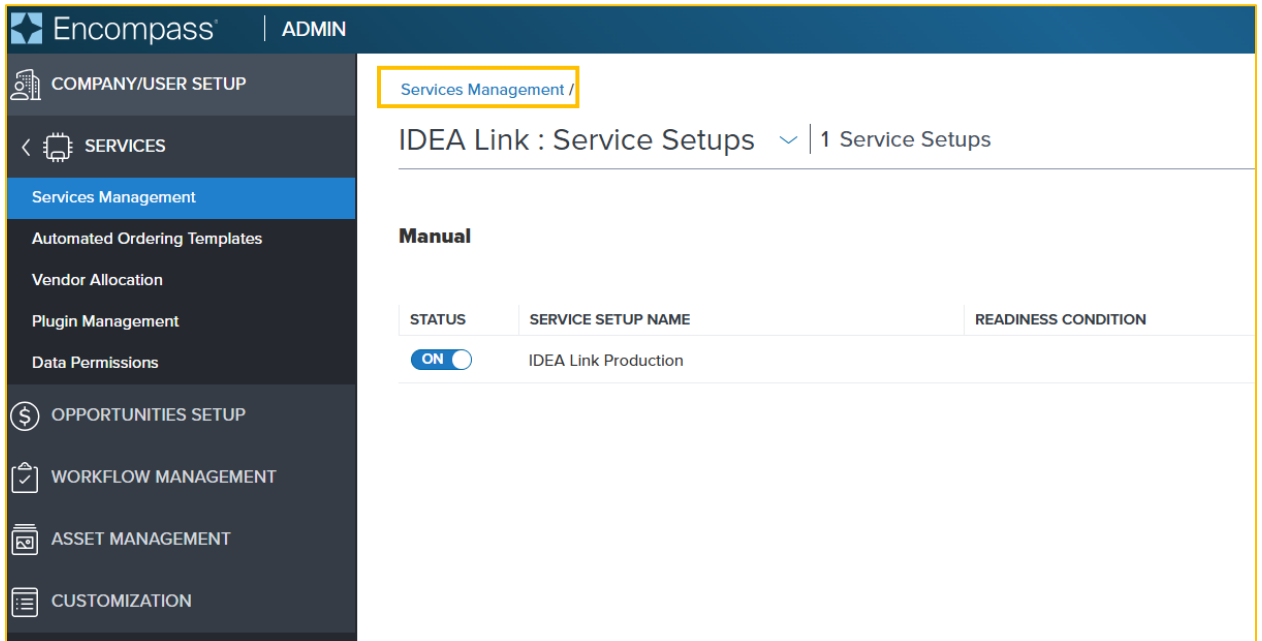
The screenshot shows the 'Edit Manual Setup' screen in the Encompass Admin interface. The left sidebar contains navigation options: COMPANY/USER SETUP, SERVICES (selected), OPPORTUNITIES SETUP, WORKFLOW MANAGEMENT, ASSET MANAGEMENT, and CUSTOMIZATION. The main content area is titled 'Services Management / Service Setups / Edit Manual Setup'. It includes fields for 'Service Type' (Additional Services), 'Evaluation Level' (Loan Level), and 'Provider' (IDEA Link). The 'Service Setup Name' is 'IDEA Link Production' and the 'Service Setup Description' is 'IDEA Link Service in Production region. This is an EPC application for submitting IDEA requests.' There are 'Validate' and 'Evaluate' buttons. Below these is a 'Readiness Conditions' section with a 'Condition Editor' tab. At the bottom, there is an 'Authorized Users' section with two tables: 'Category' (Organizations, Users, Personas) and 'Selected Entities' (Loan Processor, Loan Officer).

Review the service and use the slider to activate the service.

The service can be added in deactivated status and activated later when necessary.

Click "Save" on bottom right to save settings and close this screen.

9. Click on "Services Management" to navigate back to Services Management screen.



Encompass | ADMIN

COMPANY/USER SETUP

SERVICES

Services Management

Automated Ordering Templates

Vendor Allocation

Plugin Management

Data Permissions

OPPORTUNITIES SETUP

WORKFLOW MANAGEMENT

ASSET MANAGEMENT

CUSTOMIZATION

Services Management /

IDEA Link : Service Setups | 1 Service Setups

Manual

STATUS	SERVICE SETUP NAME	READINESS CONDITION
ON	IDEA Link Production	

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