



IDEA LINK® Integration User Manual

Version 1.0

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Change History

Date	Change	Author
7/10/2026	Document creation	Krishan Sammi
8/21/2026	Incorporated the feedback from LoanLogics	Krishan Sammi
9/10/2026	Updated the screenshots (app name changed to IDEA Link)	Krishan Sammi



Overview

LoanLogics IDEA®, an intelligent document processing and data extraction platform designed for the mortgage industry, now integrates with ICE's Encompass Partner Connect (EPC). The new product is called **IDEA Link®**

This **IDEA Link®** User Manual provides step-by-step guidance for using the Encompass platform to submit **IDEA Link®** requests. This manual is intended for Encompass users accessing the IDEA-EPC application through the Encompass Loan Origination System (LOS).

*Note: Clients who have not yet transitioned off of the Encompass SDK platform will need to upgrade to EPC in order to use the **IDEA Link®***

What You'll Learn

- Access the **IDEA Link®** from your platform
- Create a new **IDEA Link®** request
- Upload documents from Encompass eFolder
- Submit requests
- Track the status of requests on the dashboard

Getting Started – Choose Your Platform

Encompass has two platforms. Choose the section below that matches your setup:

Section A: Encompass Desktop (Smart Client)

- Follow Section A if you access Encompass through a local desktop application (aka Smart Client). You will navigate using a graphical interface with menu bars, buttons, and windows.

Section B: Encompass LO Connect (Web)

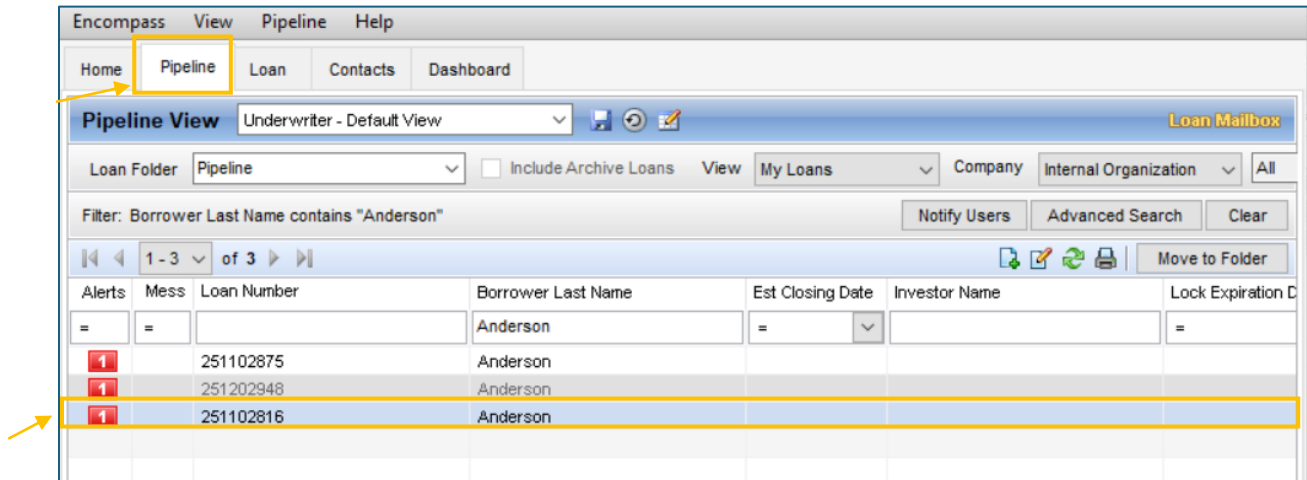
- Follow Section B if you access Encompass through a web browser. Your screens and menus may look different from examples shown, depending on how your profile is configured.

 **Note:** Skip to the section that matches your platform. You do not need to read both.

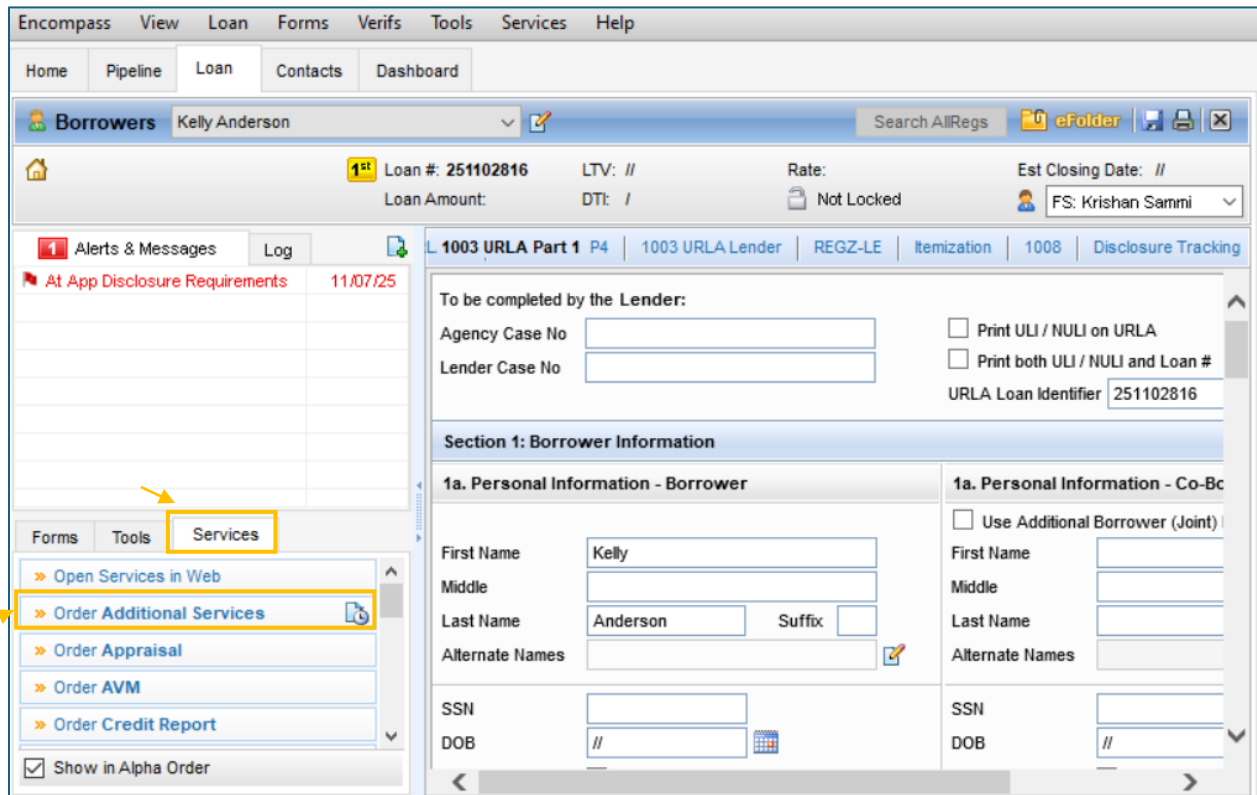
Section A: Encompass Desktop (Smart Client)

Step-1: Open the pipeline

To open the IDEA Link application from the Desktop, go to **Pipeline** and double-click the **application** row.



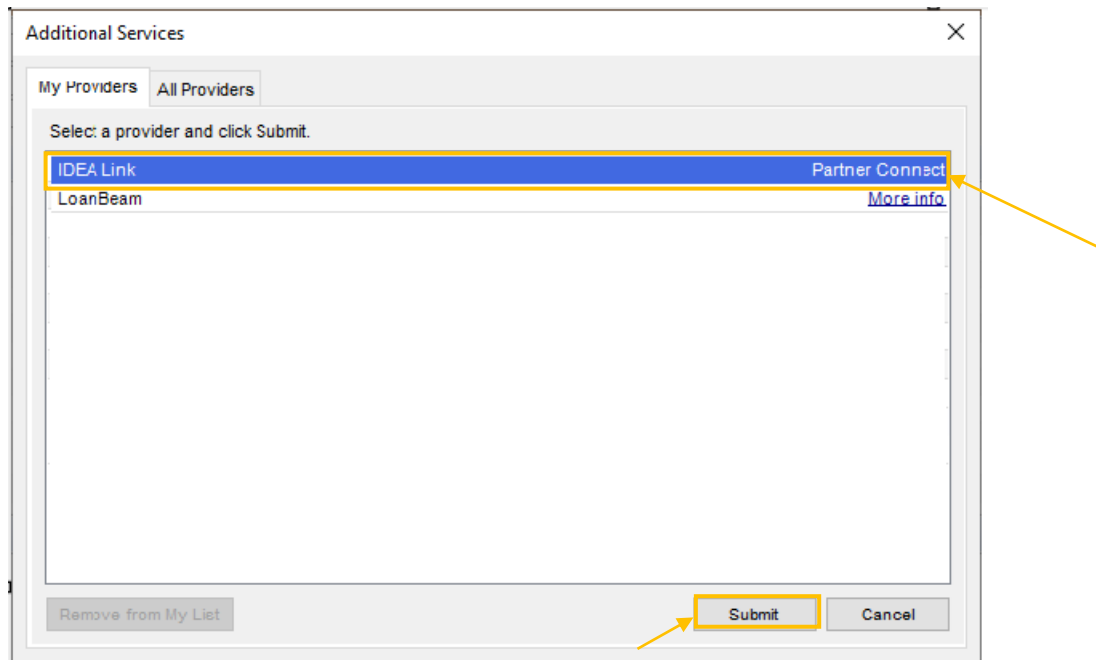
Step-2: Select **Services**, then **Order Additional Services**.



The screenshot displays the LoanLogics web application interface. The top navigation bar includes links for Encompass, View, Loan, Forms, Verifs, Tools, Services, and Help. Below this, a secondary navigation bar shows Home, Pipeline, Loan, Contacts, and Dashboard. The main header area displays the borrower's name, Kelly Anderson, and a search bar. The loan details section shows Loan #: 251102816, LTV: //, Rate: //, Est Closing Date: //, Loan Amount: //, DTI: /, and Not Locked status. The URLA section is active, showing 1003 URLA Part 1 P4, 1003 URLA Lender, REGZ-LE, Itemization, 1008, and Disclosure Tracking. The left sidebar contains Alerts & Messages, Log, and a list of services: Open Services in Web, Order Additional Services (highlighted with a yellow box and an arrow), Order Appraisal, Order AVM, and Order Credit Report. The main content area shows the 'To be completed by the Lender' section with fields for Agency Case No, Lender Case No, and URLA Loan Identifier (251102816). Below this is Section 1: Borrower Information, which is divided into two columns: 1a. Personal Information - Borrower and 1a. Personal Information - Co-Borrower. The Borrower column contains fields for First Name (Kelly), Middle, Last Name (Anderson), Suffix, Alternate Names, SSN, and DOB. The Co-Borrower column contains fields for First Name, Middle, Last Name, Alternate Names, SSN, and DOB. A checkbox for 'Use Additional Borrower (Joint)' is also present.

Step-3: Select Service

Select **IDEA Link®** service and click **Submit**.



 **Note:** After opening IDEA LINK® application, the process and screen navigation are the same for both Encompass Desktop and Web. Proceed to the **Create New Request** section to start a new IDEA LINK® Request or go to the **IDEA LINK® Dashboard** section to view results from previously submitted requests.

After you click **Submit**, one of the following screens appears:

- (1) When there are no pre-existing requests for the selected loan number:

The page shows no requests and provides a button “+Create Your First Request” to take the user to submit a new request:

[Encompass](#)
PIPELINE > LOAN

260703778

Mid FICO

No Subject Property

\$0.00

0.000%

Not Locked

No Loan Program

\$0.00

0.000 / 0.000

0.000 / 0.000 / 0.000

Loan Purpose

MM/DD/YYYY

FS: Jameel S

loanlogics

Loan Number: 260703778

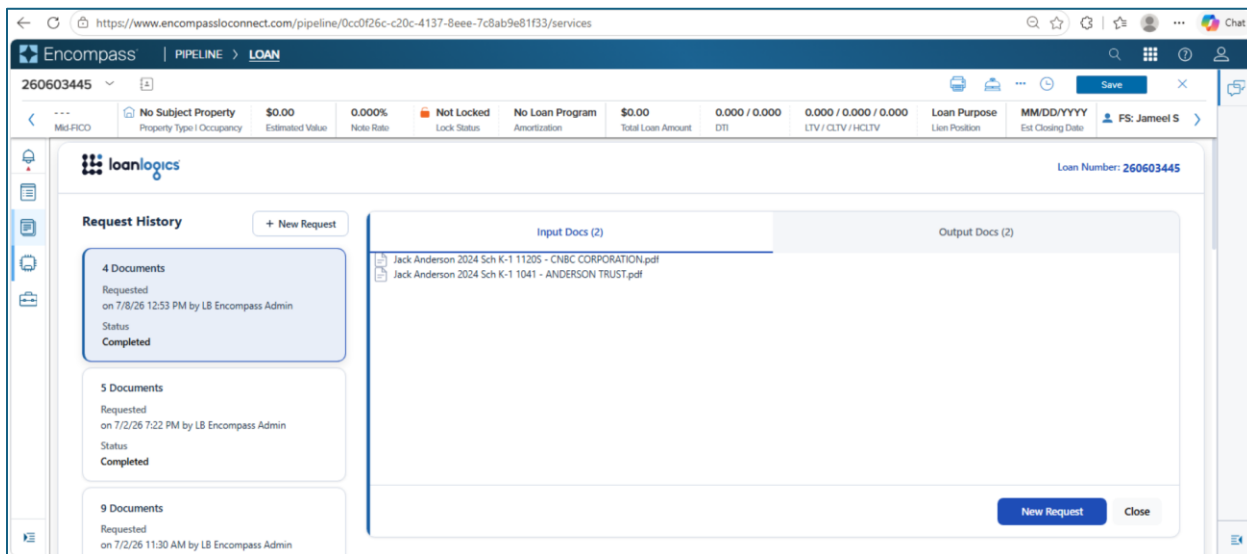
No Requests Yet

You haven't created any document requests yet. Get started by creating your first request to process documents.

+ Create Your First Request

(2) When there is at least one pre-existing request for the selected loan number:

It opens up Dashboard page to show previously submitted requests:

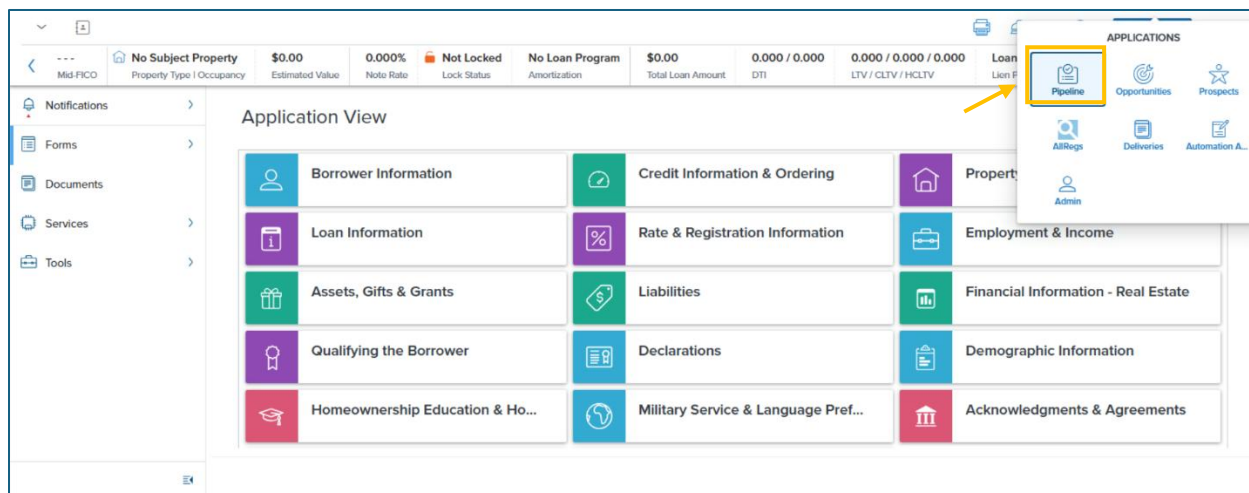


Section B: Encompass LO Connect (Web)

Before you begin, note that Encompass LO Connect (Web) profiles may be configured differently by user. As a result, your screens, menus, or navigation may look slightly different from the examples shown here. However, once you locate and launch IDEA LINK® and select Order Services, the remaining steps in the process are the same for all users.

Step1: Open Pipeline

After signing in to Encompass, open the Applications pop-up and select Pipeline if it isn't already displayed. Otherwise, skip to the next step.

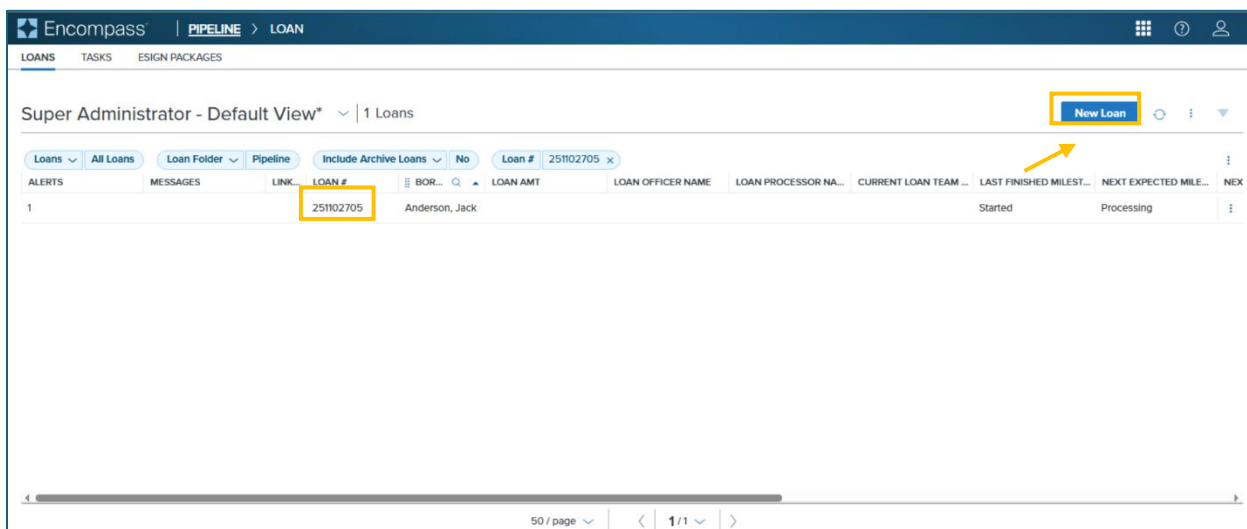


Step2: Select or create a new loan

The system displays loans specific to the user. To select an existing loan, click anywhere within the corresponding **application** row.

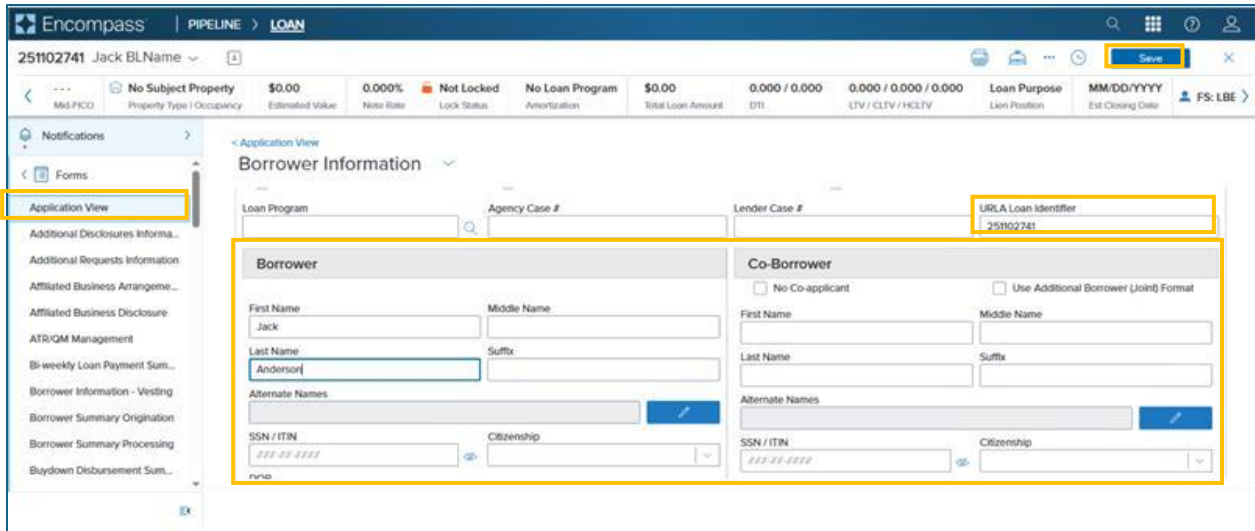
Optional Special Process

This is not the normal process—loans are typically already in Encompass. If a loan is not present, click **New Loan** to create one.



Note: To search for a particular loan number, click on the loan number column header.

Click **Application View** from the left-hand navigation to view or update the borrower or co-borrower information then click **Save**. Alternatively, skip to the Application View if this screen is not present.



Encompass | PIPELINE > LOAN

251102741 Jack BLName

Save

Med-FICO No Subject Property \$0.00 0.000% Not Locked No Loan Program \$0.00 0.000 / 0.000 0.000 / 0.000 / 0.000 Loan Purpose MM/DD/YYYY FS: LBE

Notifications

Forms

Application View

Additional Disclosures Informa...
Additional Requests Information
Affiliated Business Arrangeme...
Affiliated Business Disclosure
ATR/GM Management
Bi-weekly Loan Payment Sum...
Borrower Information - Vesting
Borrower Summary Origination
Borrower Summary Processing
Buydown Disbursement Sum...

< Application View

Borrower Information

Loan Program Agency Case # Lender Case # URLA Loan Identifier 251102741

Borrower

First Name Middle Name
Jack
Last Name Suffix
Anderson
Alternate Names
SSN / ITIN Citizenship

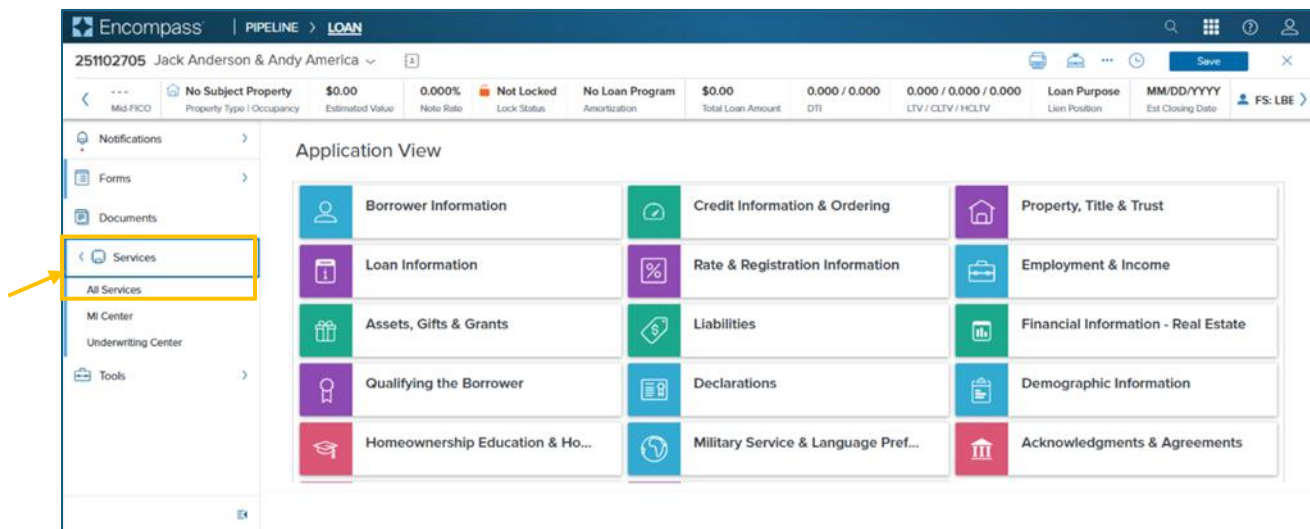
Co-Borrower

☐ No Co-applicant ☐ Use Additional Borrower (Joint) Format

First Name Middle Name
Last Name Suffix
Alternate Names
SSN / ITIN Citizenship

Step3: Navigate to Services

On the Application View page, scroll down on the left hand navigation menu until you see **Services**, select it, and then, click **All Services**.



Encompass | PIPELINE > LOAN

251102705 Jack Anderson & Andy America

Save

Med-FICO No Subject Property \$0.00 0.000% Not Locked No Loan Program \$0.00 0.000 / 0.000 0.000 / 0.000 / 0.000 Loan Purpose MM/DD/YYYY FS: LBE

Notifications

Forms

Documents

Services

All Services

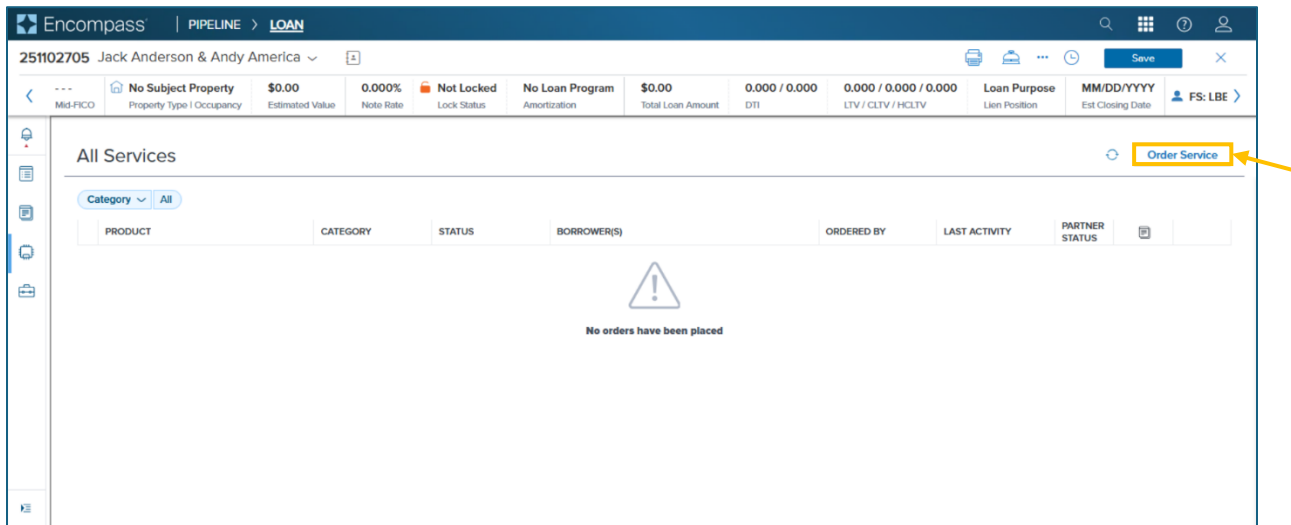
MI Center
Underwriting Center
Tools

Application View

Borrower Information	Credit Information & Ordering	Property, Title & Trust
Loan Information	Rate & Registration Information	Employment & Income
Assets, Gifts & Grants	Liabilities	Financial Information - Real Estate
Qualifying the Borrower	Declarations	Demographic Information
Homeownership Education & Ho...	Military Service & Language Pref...	Acknowledgments & Agreements

Step 4: Order Service

Click on **Order Service** located on the right.

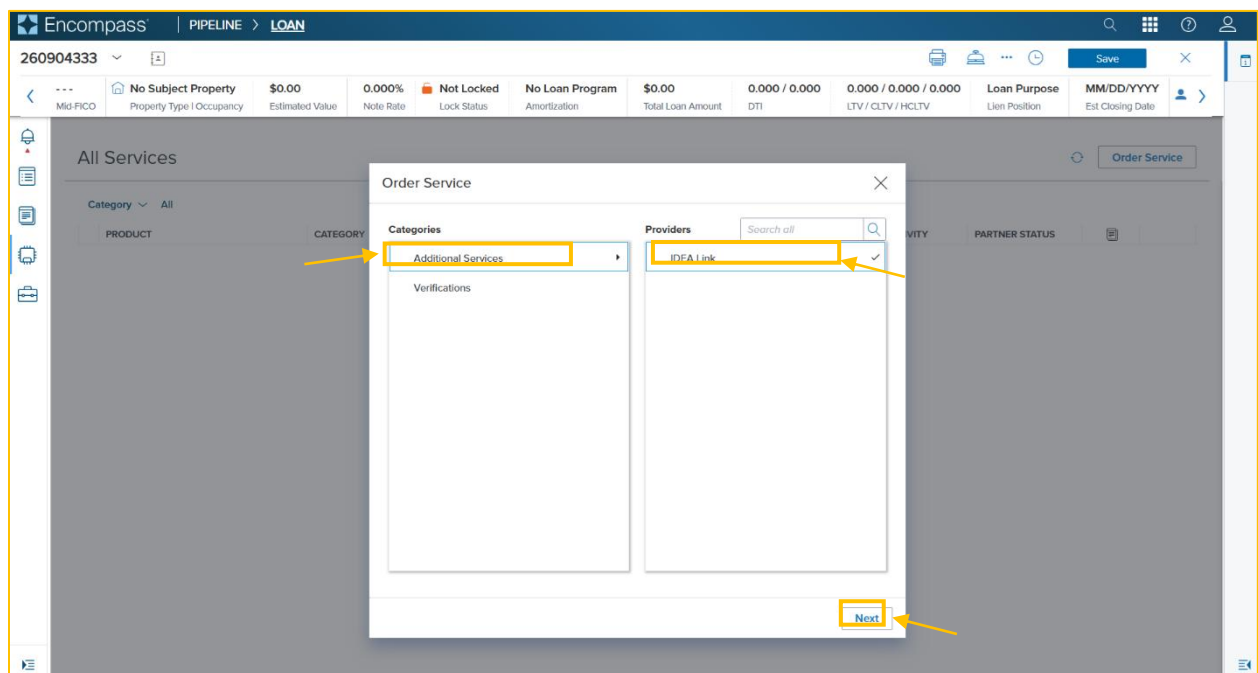


Note: If no services are ordered, a warning icon appears with the message: No orders have been placed.

The **Order Service** window appears.

Under Categories, select **Additional Services** then click **IDEA LINK®** as the provider.

Click **Next**.





- 📌 **Note:** After clicking Next, you may create a new **IDEA LINK® request** described in the next section or skip to the **IDEA LINK® Dashboard** section to review applications.
- 📌 **Note:** Once the application is completed processing, the results are displayed under the Dashboard page.

Order Service

The system displays the current workflow step and provides access to available services and providers.

Categories Panel (left side) lists service categories such as Additional Services and Verifications. IDEA LINK® is located under **Additional Services**.

Providers Panel (right side) includes a search bar to quickly locate providers. Displays a list of providers under the selected category (e.g., IDEA LINK®).

The **Next** button on the bottom right corner of the screen launches **IDEA LINK®** application. The IDEA LINK® requests information displays for both submitted and completed requests.

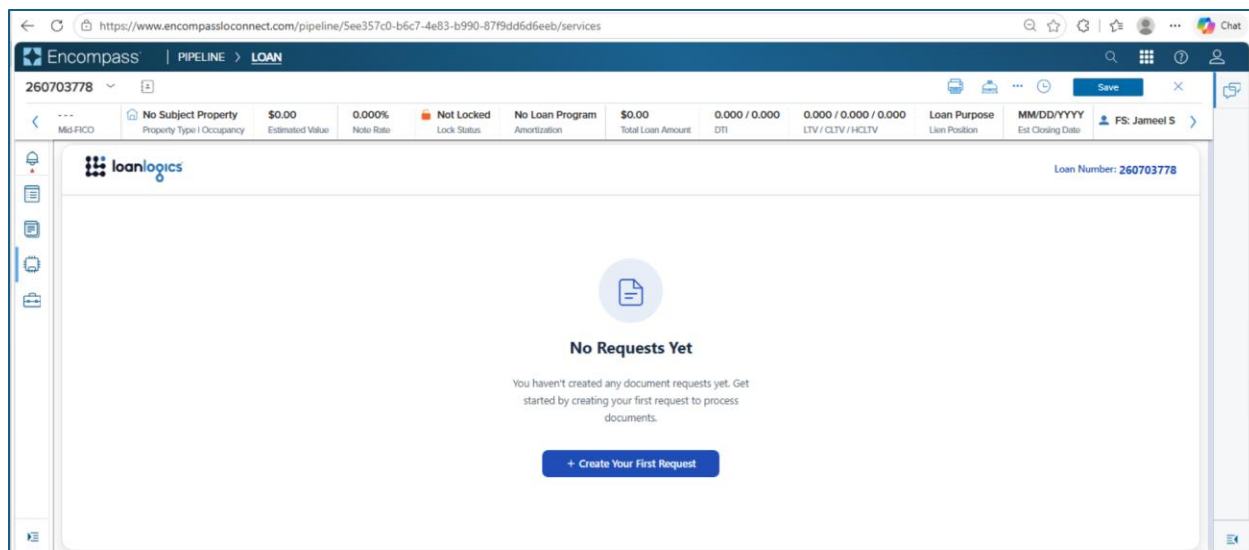
Section C - Common process for Smart Client and LO Connect:

✓ **Regardless of which platform you started from (Desktop or Web), you are now in the IDEA Link® application. All remaining steps are identical for both platforms.**

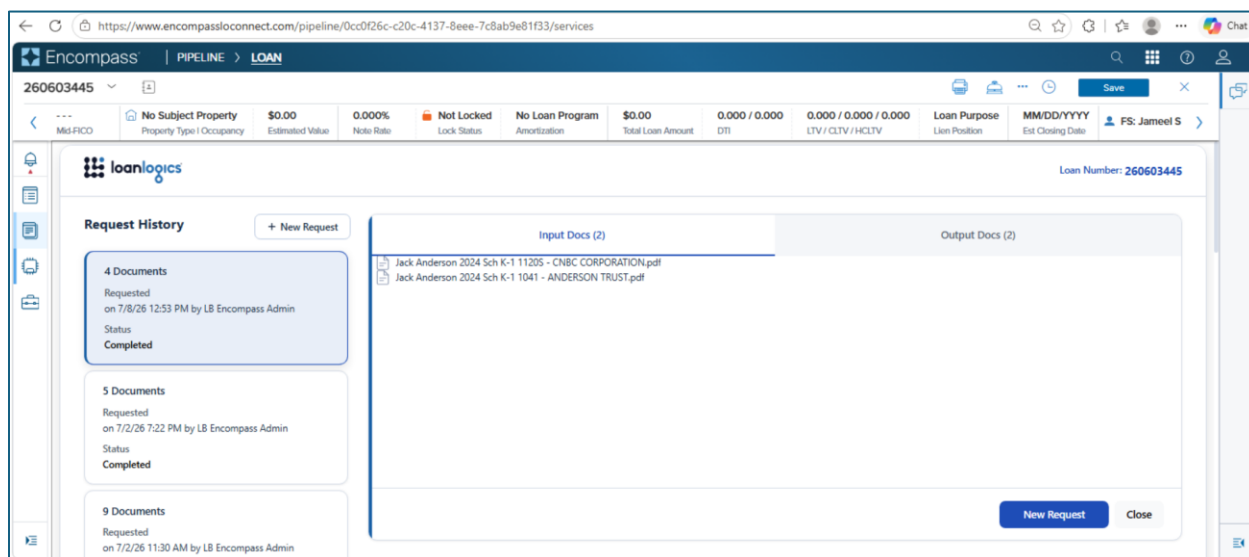
Both Desktop and Web users will now see one of these screens:

- Screen 1: "No Requests Yet" – If this is your first IDEA request for this loan. Click "+Create Your First Request" to proceed.
- Screen 2: Dashboard with Request History – If you have already submitted requests for this loan. Click "+New Request" to create another request, or review your previous requests.

Continue to the next section: "Create IDEA Link Request" to submit a new request.



Or this screen depending on whether request(s) are previously submitted or not for the selected loan number:

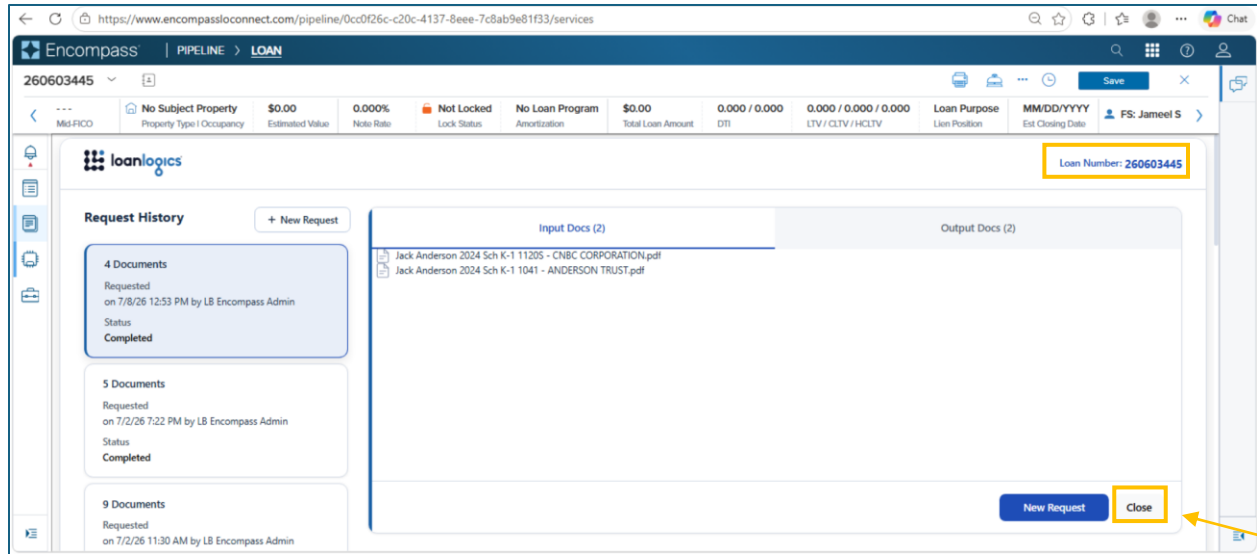


Create IDEA LINK® Request

New Request:

After selecting the loan in Encompass EPC, the IDEA LINK® dashboard displays.

Click **“+Create Your First Request”** or **“+New Request”** depending on whether it’s going to be very first request or additional new request for the selected loan number:

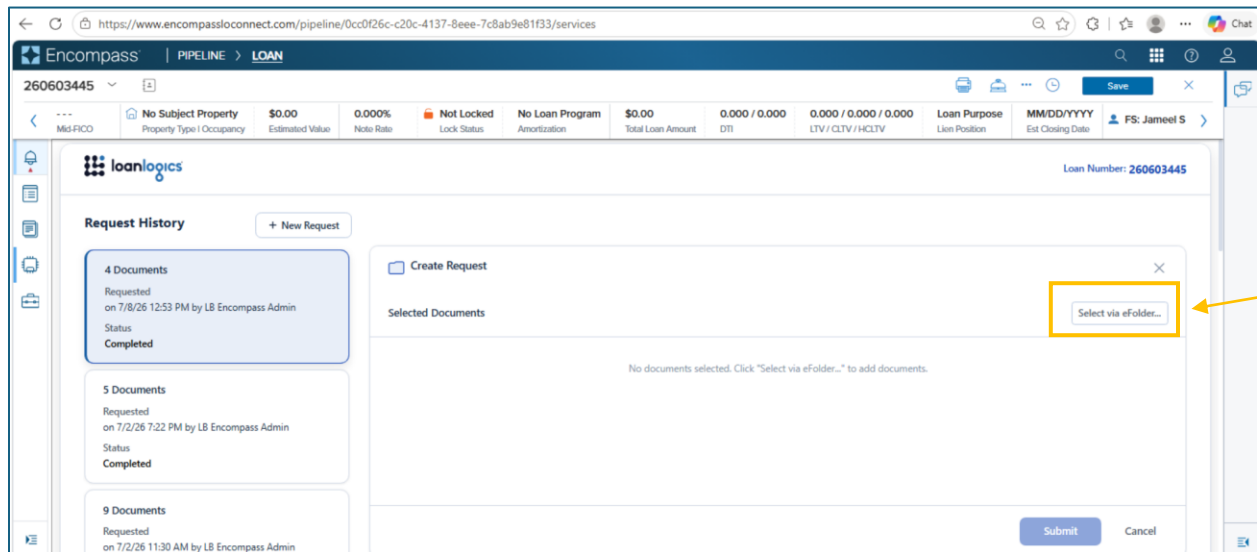


 **Note:** After clicking the New Request button, the *New Request* page displays the loan number in the upper left section and identifies the specific loan record.

Alternatively, click **Close** to exit the IDEA LINK® application.

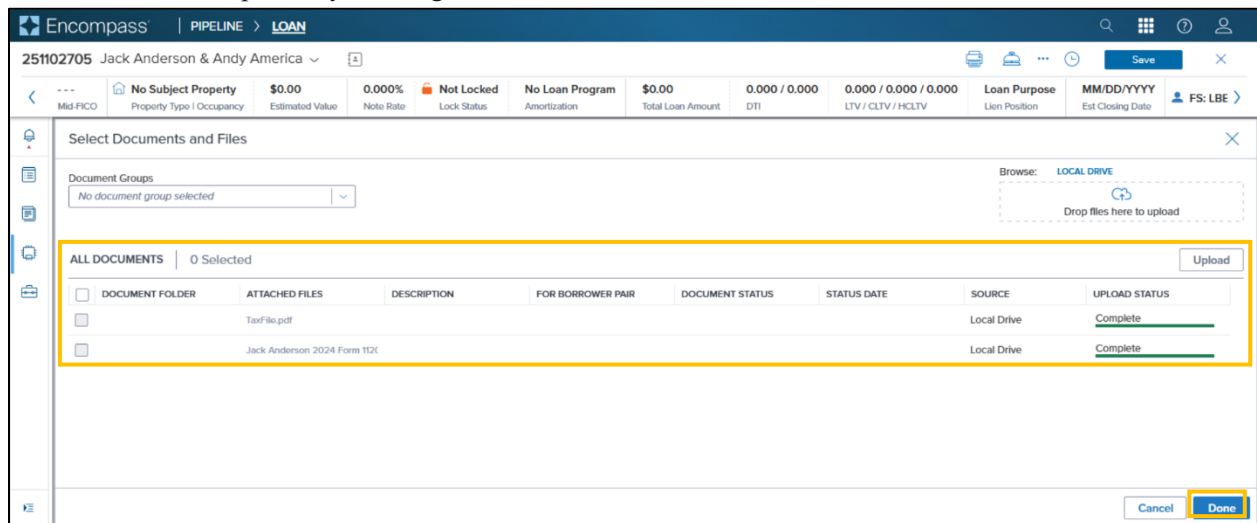
Upload Files

The next step is to goto Loan eFolder by clicking on *Select via eFolder* button:



Encompass eFolder

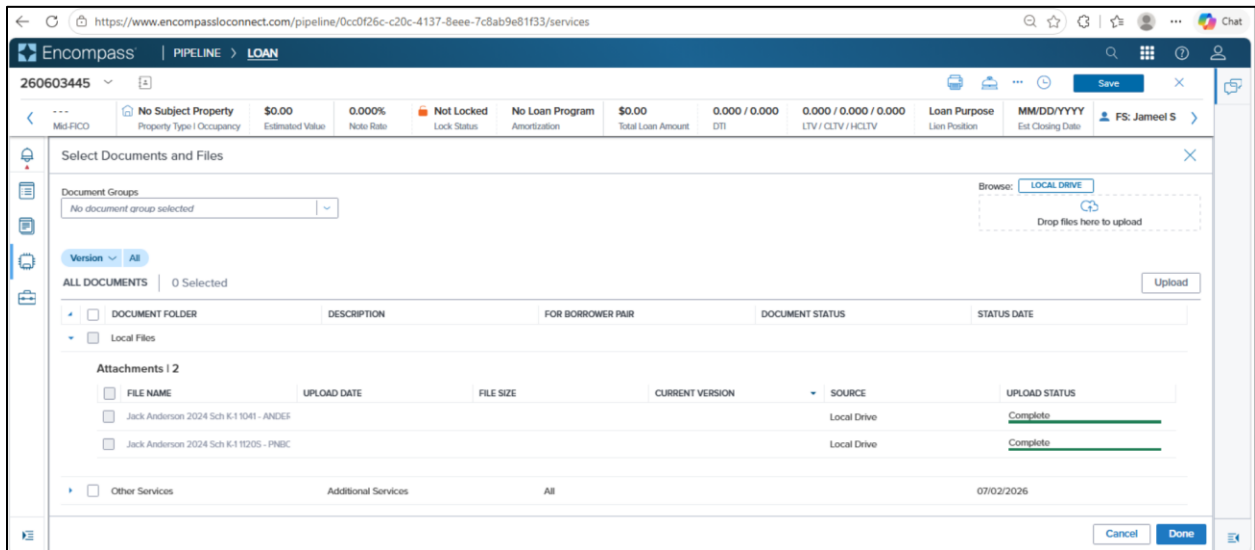
Select the files for upload by clicking the **Browse** button.



Note: Any previously uploaded files display on the bottom of the screen with the following details:

- Document folder
- Attached files
- Description
- For Borrower pair
- Document status
- Status date
- Source
- Upload status

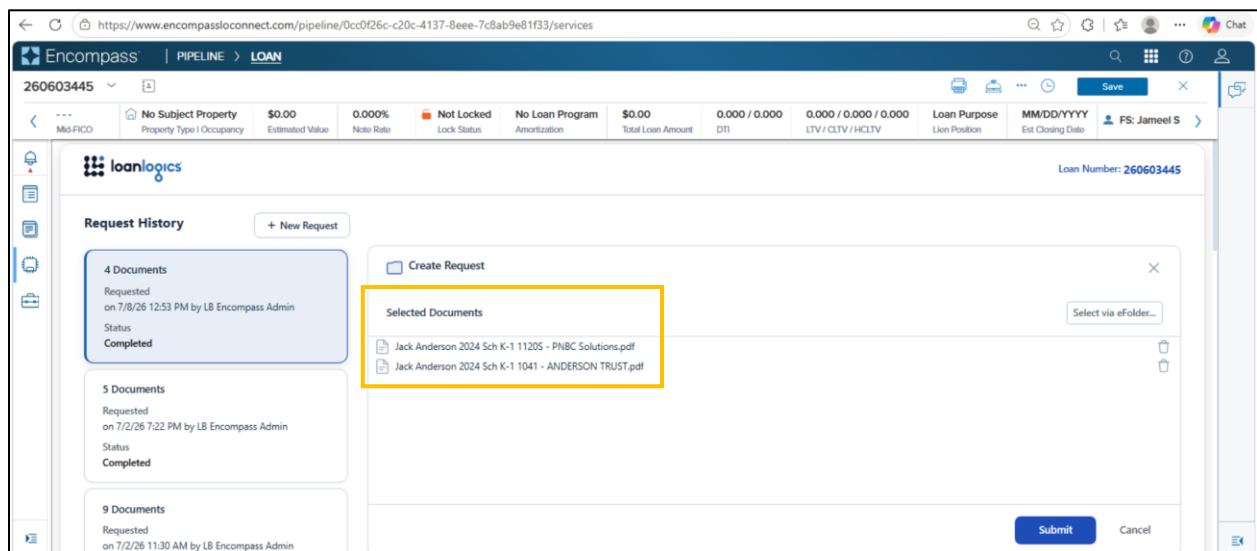
File Selection



Note: Uploads from Encompass support the PDF and images (TIFF, PNG, JPG) format.

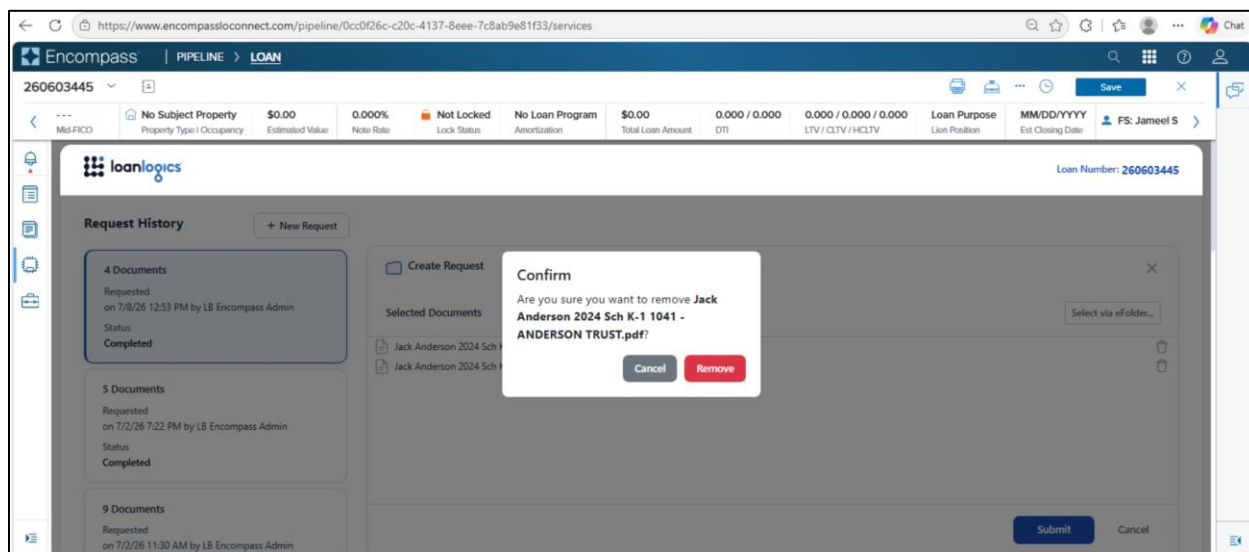
Once files are selected and upload status is changed to **Complete**, then click **Done** button at the bottom of the screen to upload the selected files.

The uploaded files are displayed in the **Selected Documents** section of the **New Request** page.



Remove Selected Document

The user can remove documents before submitting the request, if needed:

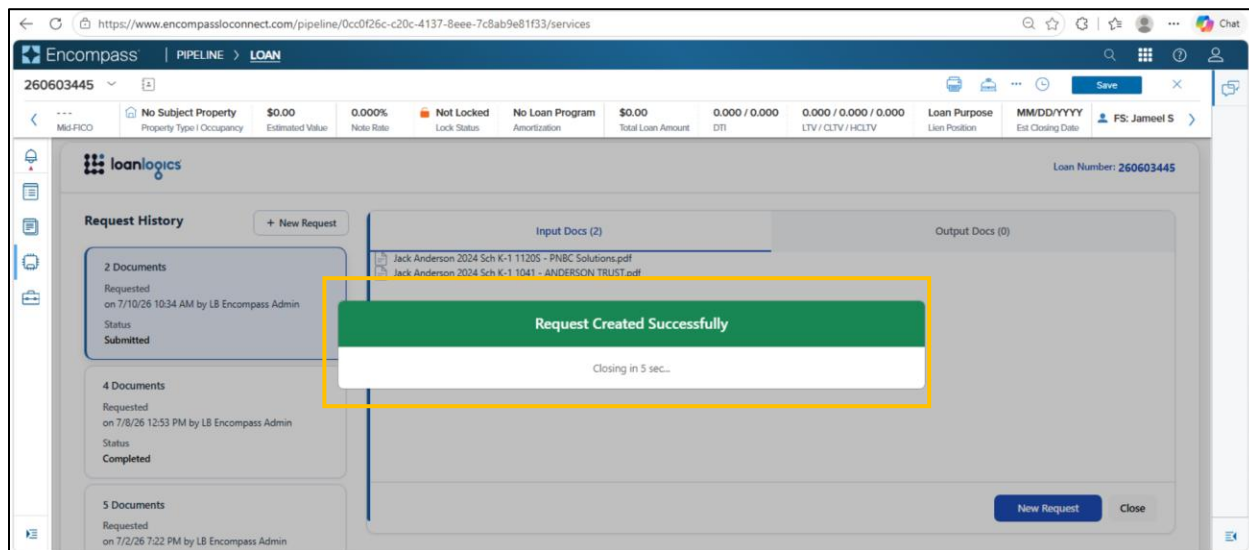


A confirmation dialog will appear to get the confirmation to remove the document.

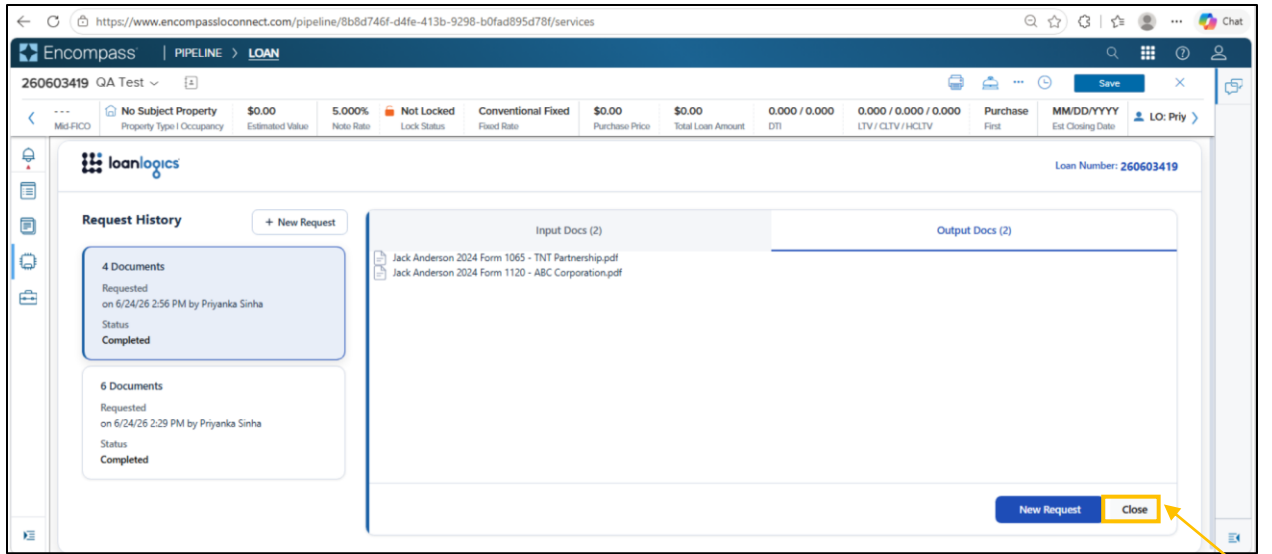
Note: The documents are removed from submitting, they are never deleted from the eFolder.

Submit Request

After reviewing the request and documents to be uploaded, click **Submit** to send the request to IDEA for processing. A count down window will appear to denote submission process is going on in the background:

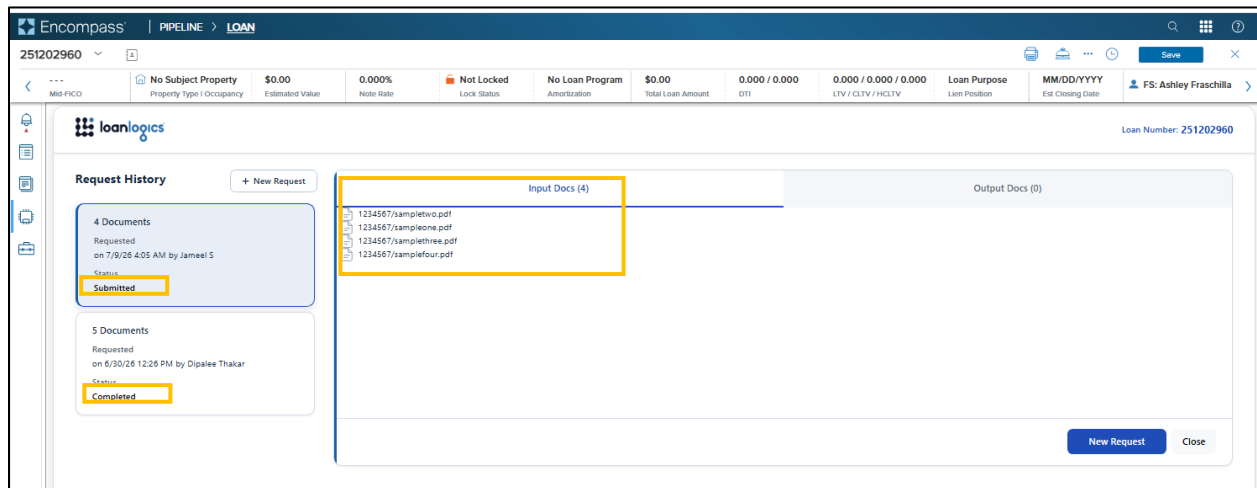


After submitting the request, click **Close** to exit the application.



IDEA LINK® Dashboard

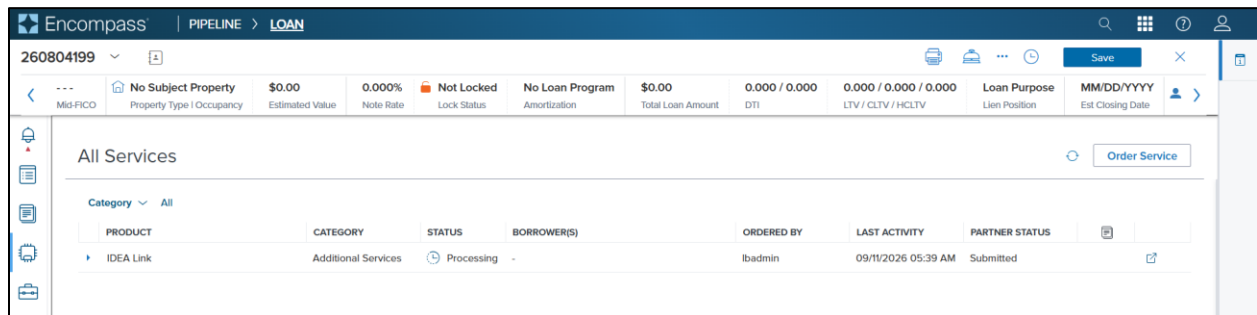
The IDEA LINK® Dashboard provides a summary of the requests details for all Submitted and Completed applications, along with the associated input and output documents.



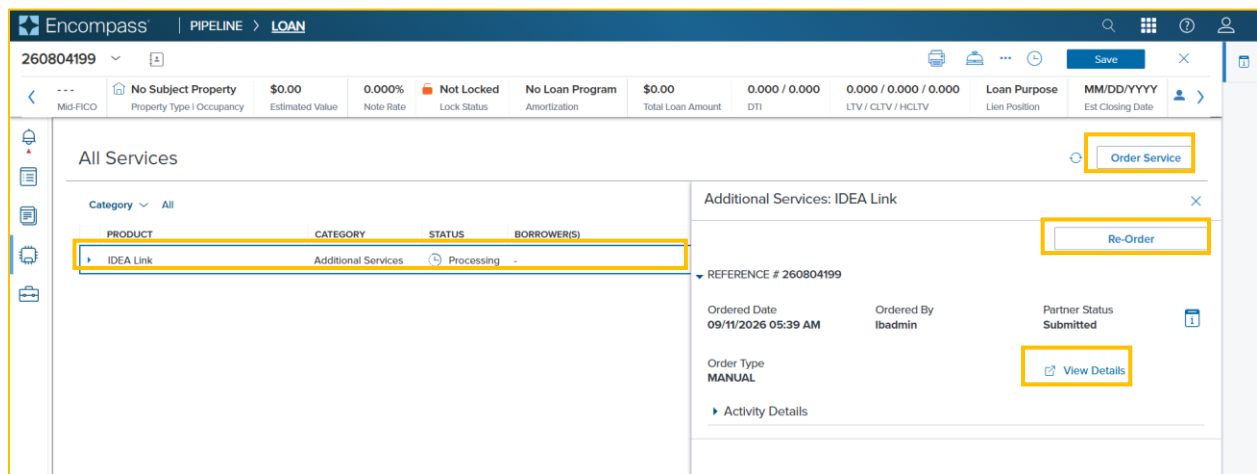


Access IDEA LINK® application

To access the IDEA LINK® application, click on the **Services** icon in the left-hand navigation panel.



Alternatively, you may double click on the loan, and the Additional Services box will appear to the right. Click on the **Order Service**, **Re-Order** or **View Details** shortcuts to access the application.



Appendix

(1) List of probable Error Messages:

The application shows custom error messages when these errors occur:

HTTP Code	Name	Message
400	Bad Request	There is an unexpected problem with our system. We are working on it. Please try again in a few minutes. If the problem persists, please contact support qcsupport@loanlogics.com
401	Unauthorized	Your session has expired. Please sign in again.
500	Server error	This is a problem with our system, not anything you did. Please try again in a few minutes. If the problem persists, please contact support qcsupport@loanlogics.com

(2) Notes

- (i) Clients who have not yet transitions off of the Encompass SDK platform will need upgrade to EPC in order to use the IDEA integration.
- (ii) Documents can ONLY be uploaded from the E-Folder (and not directly from user's desktop)

End of Document