

TUTORIAL: iConnect Fetch Loan Tool

In order to reduce the impact on the Encompass server, we do a "near real time" sync of data. Every few minutes, iConnect looks for files that have "changed". This way, iConnect does not need to consume the Encompass Processor power to open every loan file.

If your loan is not syncing properly in iConnect try this step first:

Many times a simple change to the record in Encompass such as adding punctuation to a sentence or editing the text such as the address and saving is all you need to do for the sync to happen.

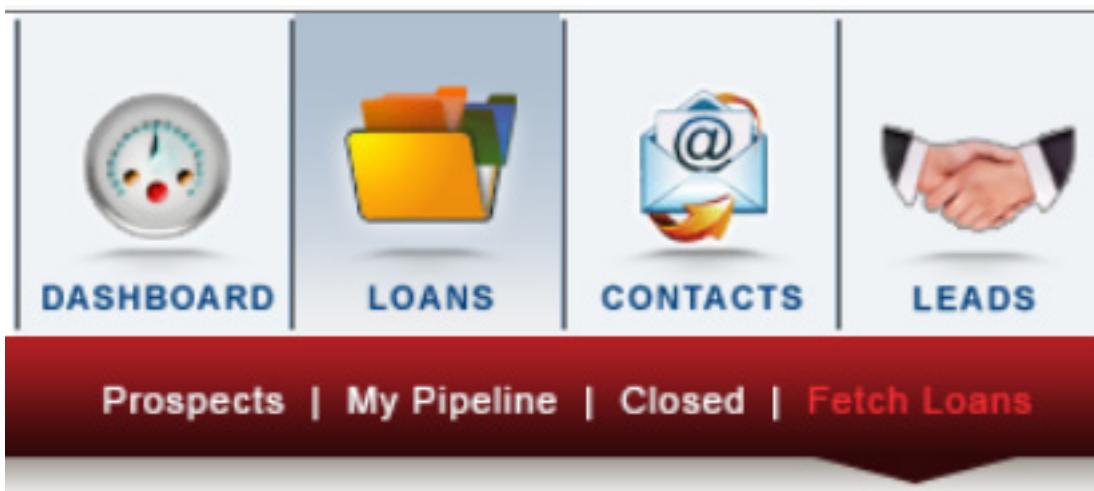
Other times, you may have moved a file from one folder to another without opening it and making changes. What happens is the loan does not update in iConnect

The ability to **"Fetch Loans"** exists in your account, in the Loans Section.

Step 1: Go to Loans



Step 2: In the sub navigation select "Fetch Loan"



Step 3: Type in your loan number

The screenshot shows the iConnect Fetch Loans tool interface. At the top, there is a navigation bar with icons for Dashboard, Loans, Contacts, Leads, Marketing, Services, Store, and Intranet. Below this is a red banner with the text "Welcome, Test Manager" and "Prospects | My Pipeline | Closed | Fetch Loans". The main content area is titled "Retrieve Loans From Encompass©". It contains a text box with the loan number "123456" and a button labeled "Get Loan From Encompass©".

AFN iConnect
Intelligent Marketing & Relationship Productivity Suite

DASHBOARD LOANS CONTACTS LEADS MARKETING SERVICES STORE INTRANET

Welcome, Test Manager Prospects | My Pipeline | Closed | Fetch Loans Quick Add Alerts Calc

Retrieve Loans From Encompass©

Enter a loan number in the box below to retrieve a loan from Encompass© in real time.
(You must be the loan originator to perform this operation)

Please only click once until result is shown

123456 Get Loan From Encompass©

Step 4: Select the “Get Loan From Encompass” Button

This screenshot is identical to the one in Step 3, but it includes a blue arrow pointing to the "Get Loan From Encompass©" button, indicating the next step in the process.

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Step 5: Once the loan has been fetched from Encompass you will see red text telling you it has now been synced.

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DASHBOARD **LOANS** **CONTACTS** **LEADS** **MARKETING** **SERVICES** **STORE** **INTRANET**

Welcome, Test Manager Prospects | My Pipeline | Closed | **Fetch Loans** Quick Add Alerts Calc

Retrieve Loans From Encompass®

Enter a loan number in the box below to retrieve a loan from Encompass® in real time.
(You must be the loan originator to perform this operation)

Please only click once until result is shown

400547715 **Get Loan From Encompass®**

04/02/2015 09:39:14.706 AM Eastern Time
Loan #: 400547715
Loan Guid: {fec42fc4-1fd3-49e5-908b-df4ae86167c4} Successfully Updated, Status: Loan Originated

Loan retrieved.
Loan Guid: {fec42fc4-1fd3-49e5-908b-df4ae86167c4} Successfully Updated, Status: Loan Originated
Lo Update Test
04/02/2015 09:39:32.007 AM Eastern Time

That's it you should now see your updated loan information in your loans section.