Encompass EPC Admin Guide

Version 5

Last Update: 12-4-2025

Contents

Change History

Date	Change	Author
8/21/2025	Document creation	Shannon Redican
8/21/2025	Updating format and verbiage	Roby Robertson
8/22/2025	Updating EPC information	Shannon Redican
9/26/2025	Updated dates for EPC conversion	Shannon Redican
12/2/2025	Updated critical dates	Shannon Redican
12/4/2025	Add SDK Desktop instructions	Jean Ballard / Krishan Sammi/Shannon Redican

Overview

LoanBeam automates income calculation and file review, dramatically reducing the time and effort spent extracting, inputting, and validating data for borrowers. And with direct connections to Freddie Mac® and Fannie Mae®, it offers a direct path to income rep and warranty assessment.

This document is intended to explain the functionality of the LoanBeam/**Encompass EPC** integration.

2026 SDK to EPC Transition Requirements

Overview

LoanBeam clients using Encompass SDK (desktop) will need to migrate to Encompass EPC by 12/31/2026.

To complete that migration, Administrators will need to:

- **Connect** LoanBeam to the EPC service using their existing LoanBeam credentials.
- **Activate** the **"LoanBeam EPC"** service inside Encompass EPC for users.

Critical Dates

- **12/31/2026 –** SDK integration deprecated.

FAQs

Q: How long will I be able to use my existing SDK integration?

A: Until 12/31/2026

Q: Will I be able to test EPC before SDK is deprecated?

A: Yes. SDK and EPC can be used simultaneously until 12/31/2026.

Q: Will applications processed via the SDK integration be viewable in the EPC interface?

A: Yes. LoanBeam applications created for a loan using the SDK integration will be accessible via the new EPC interface.

Q: What if I am using IP Authentication on the LoanBeam website?

A: The LoanBeam integration with Encompass Partner Connect (EPC) utilizes the ICE Encompass security settings and does not reference LoanBeam IP Authentication settings.

Setting up the API connection – LoanBeam Administrators only

To establish the connection between LoanBeam and Encompass, you must first establish the API (Application programming interface) connection. (Note: This is a one-time event.)

Important Note!

Before you begin the steps outlined below, make sure you meet the following parameters:

- You are an Administrator User to Encompass and LoanBeam.
- You have successfully logged in to LoanBeam.
- You have used the SAME email address for Encompass and LoanBeam.

Examples:

LoanBeam	Encompass	Status
johnny.somebody@email.com	johnny.somebody@email.com	**Acceptable**
johnny.somebody@email.com	jsomebody@email.com	**Not Acceptable**
johnny.somebody@email.com	johnny.somebody@othermail.com	**Not Acceptable**

Copying existing Encompass Token from LoanBeam

Overview

For clients who have an existing API token connected to Encompass AND **would like to reuse** that for their EPC integration, **they may just copy the existing token.**
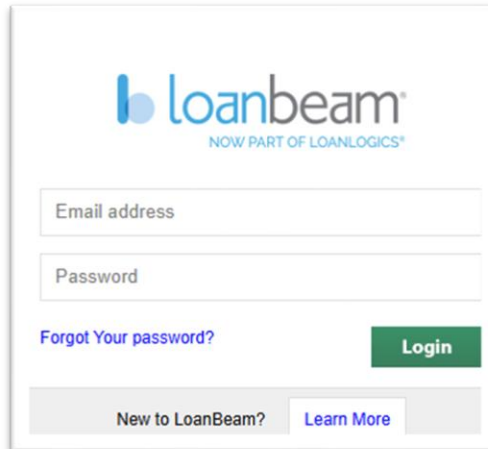
To copy the existing token, access the API token within your LoanBeam Admin portal by completing steps 1 through 3 in the below steps. Then, copy the API token as outlined in step 9.

Creating New API token in LoanBeam

Overview
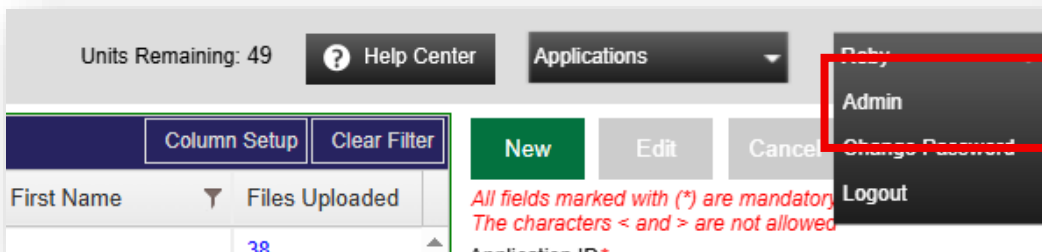
For clients that would like to create a new API token for this new EPC integration, complete the following steps.

1. Log into your LoanBeam dashboard (*secure.loanbeam.com*)
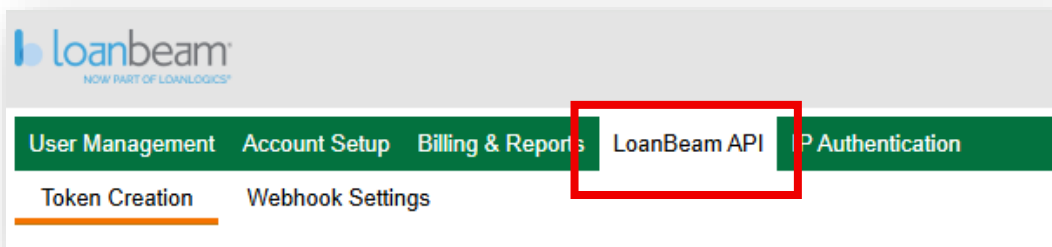
2. Navigate to the dark-grey drop-down box at the top right of the screen containing your name at the top right of the LoanBeam dashboard, click "Admin."
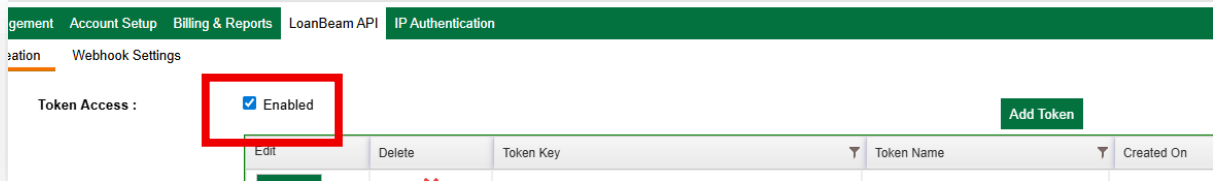
3. Click "LoanBeam API" from the top menu.

(Continued on next page.)
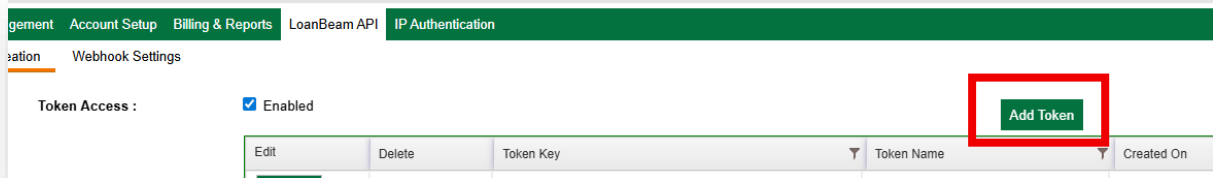
4. Enable token access by checking the "Enabled" box.
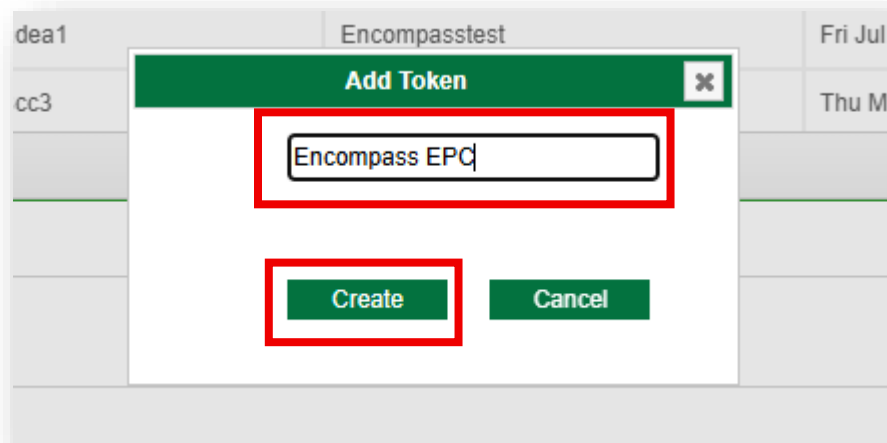
5. Create a LoanBeam API token by clicking "Add Token."
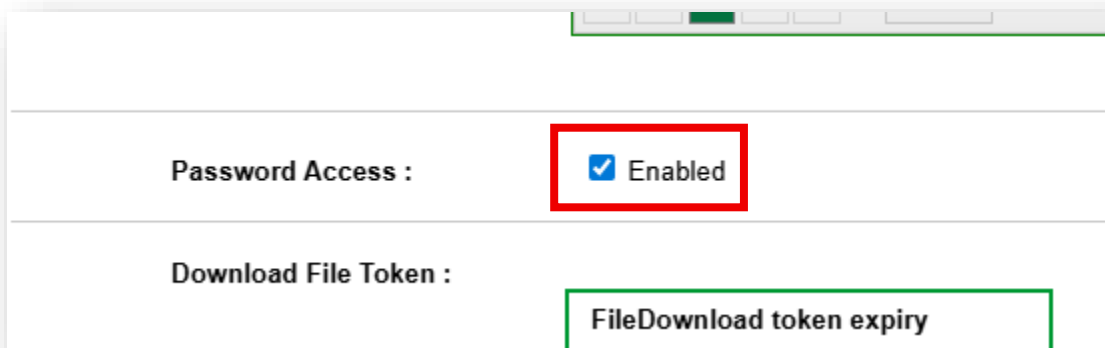
6. Create a name for the token, for example, "Encompass EPC." Then, click "Create."
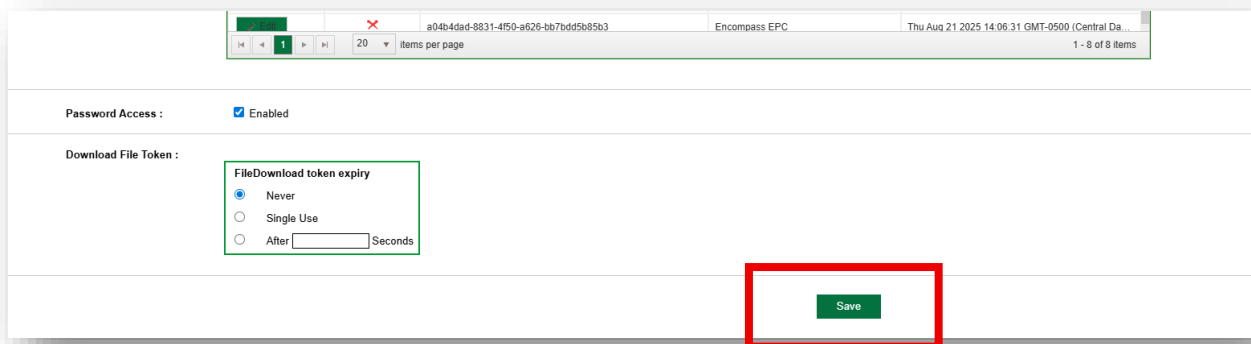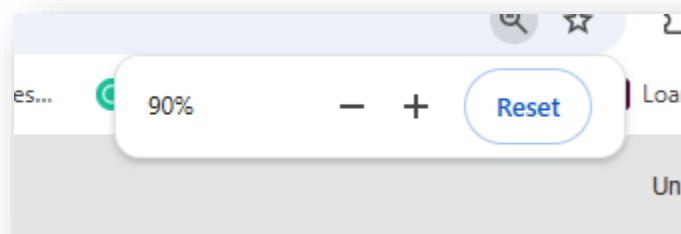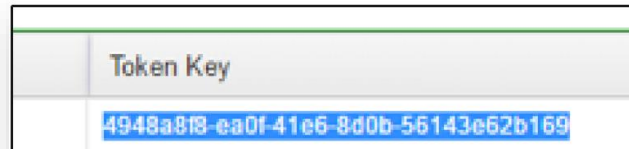
7. Check the "Enabled" box on "Password Access" row.

8. Click "Save."

Note! If you are unable to see the save button at the bottom of the screen, zoom out on your browser by holding CTRL and pushing the "-" button.

9. Copy the API key to your clipboard by clicking and dragging your mouse across the number and pressing "CTRL+C" on your keypad.

Token Key

4948a818-ea0f-41e6-8d0b-56143e62b169

10. **Continue onto Encompass EPC's Admin dashboard.**

Note For Desktop Users Only

To use LoanBeam through Encompass Desktop, you must complete a one-time process to enable the web-version settings. Click **Encompass Settings** then **Web Version Settings** to proceed.
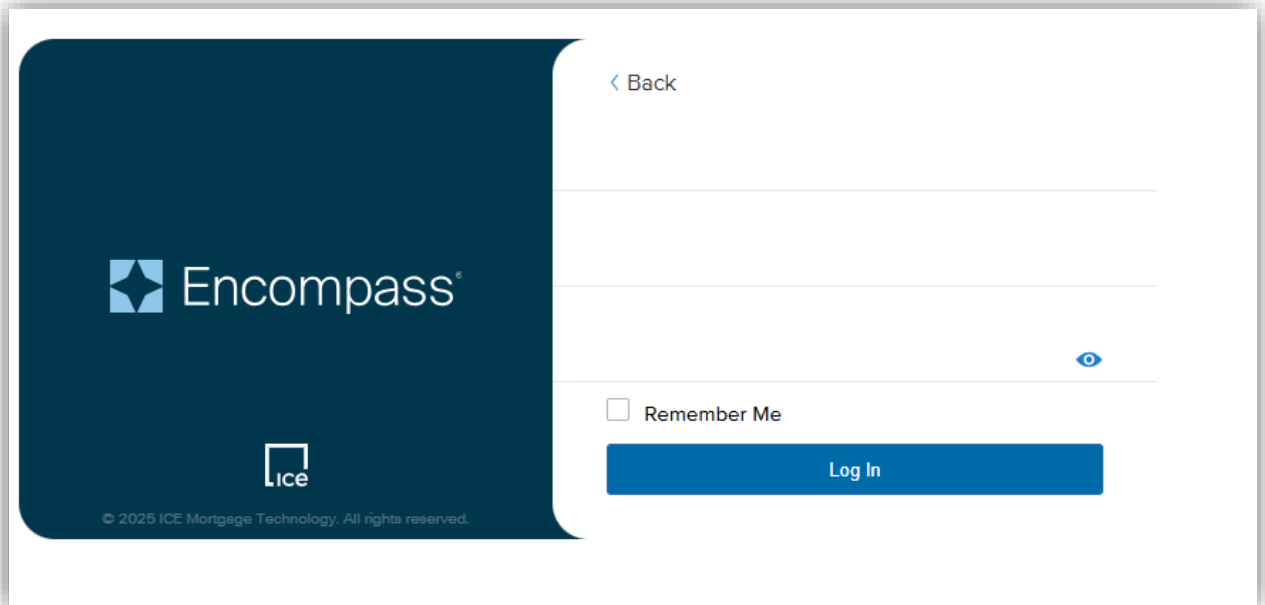

© LoanLogics – All Rights Reserved
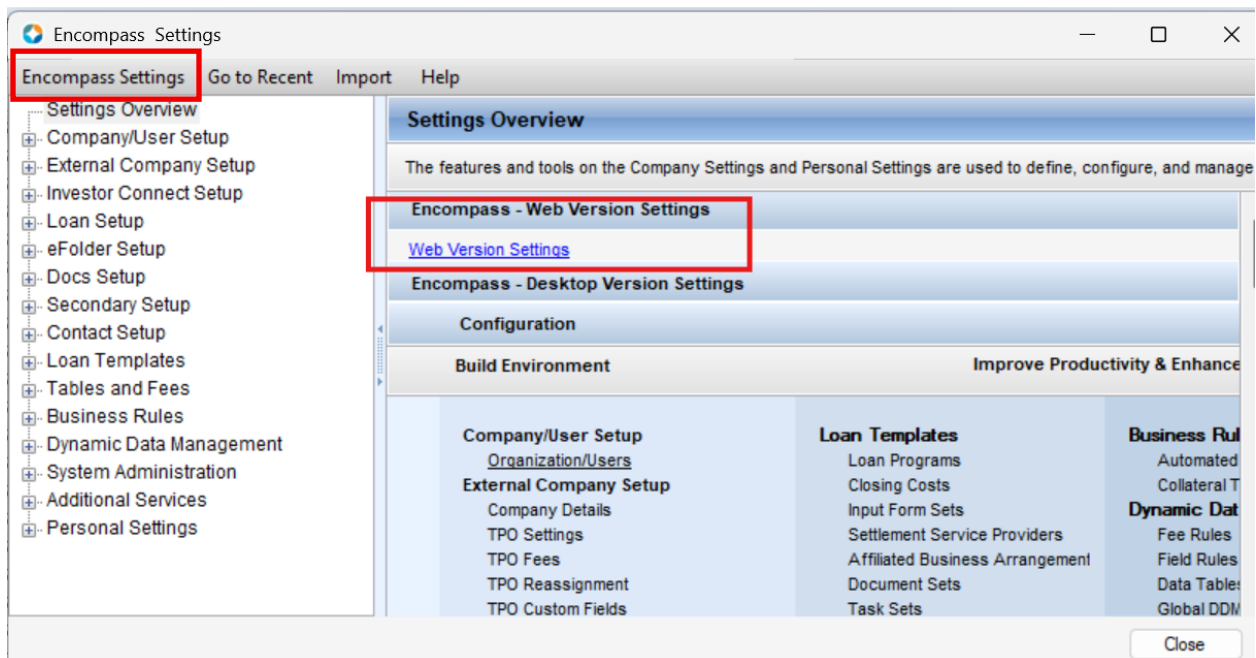
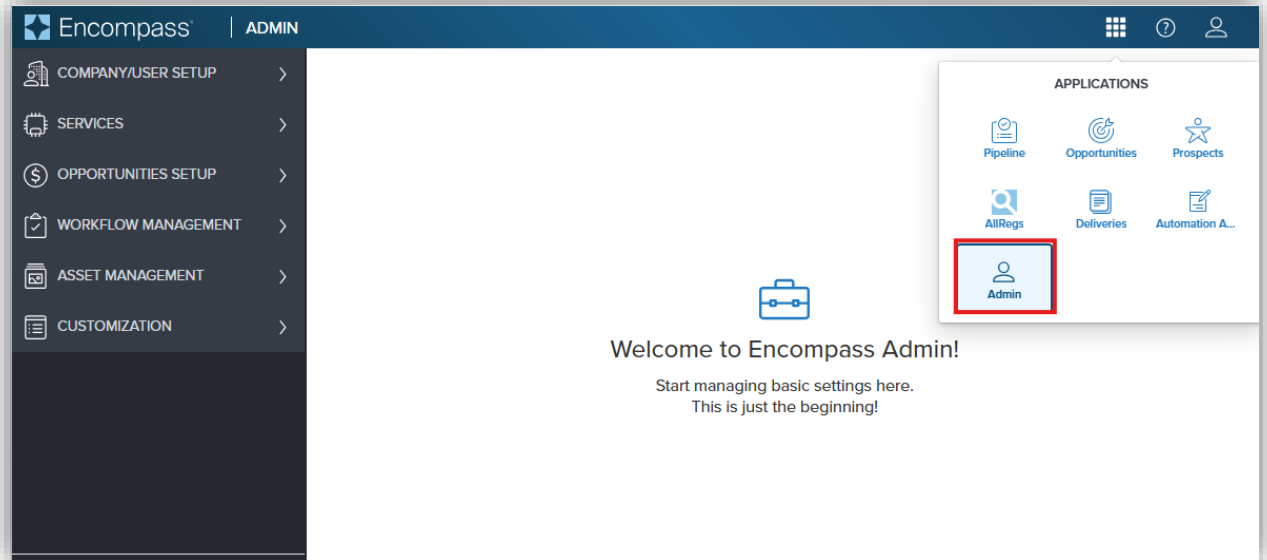# Create LoanBeam EPC service and add LoanBeam credentials

Overview

Clients who have completed the process to copy or create an API token in LoanBeam complete the following steps.

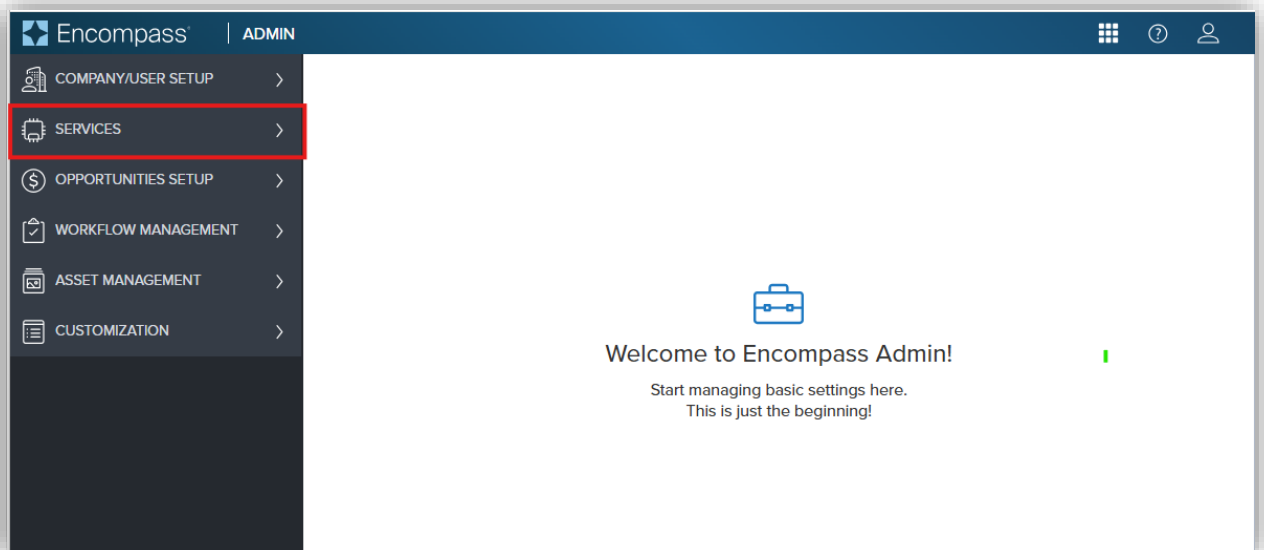11. Log in to Encompass EPC https://encompassloconnect.com

(Continued on next page.)

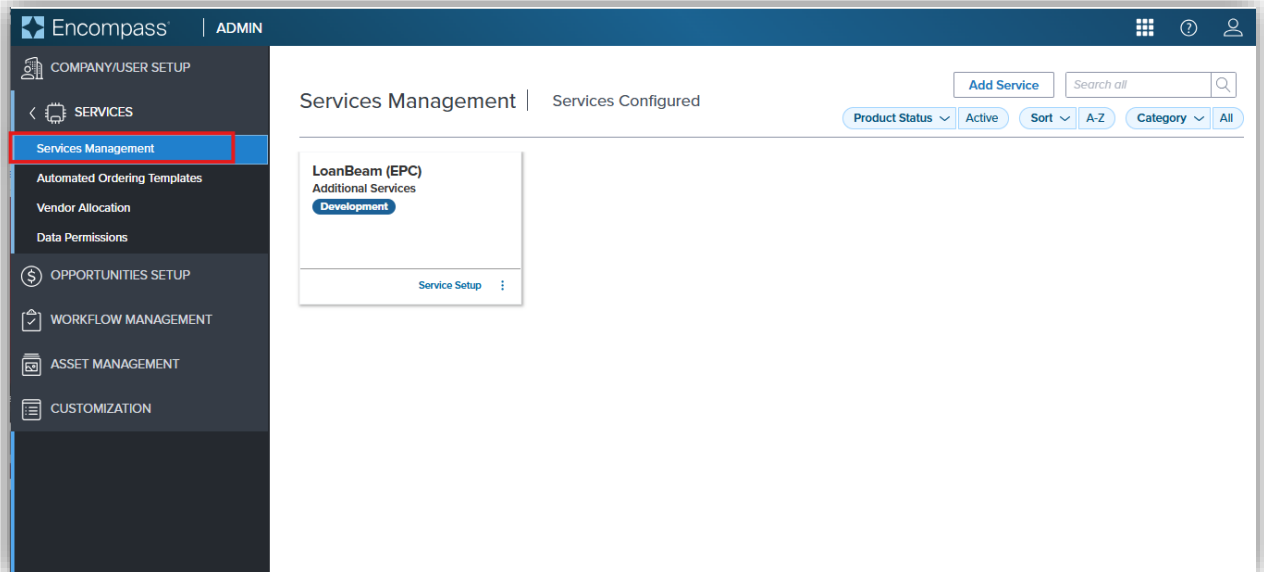12. Navigate to top right corner panel and click on "Admin" to launch Admin console.

(Continued on next page.)

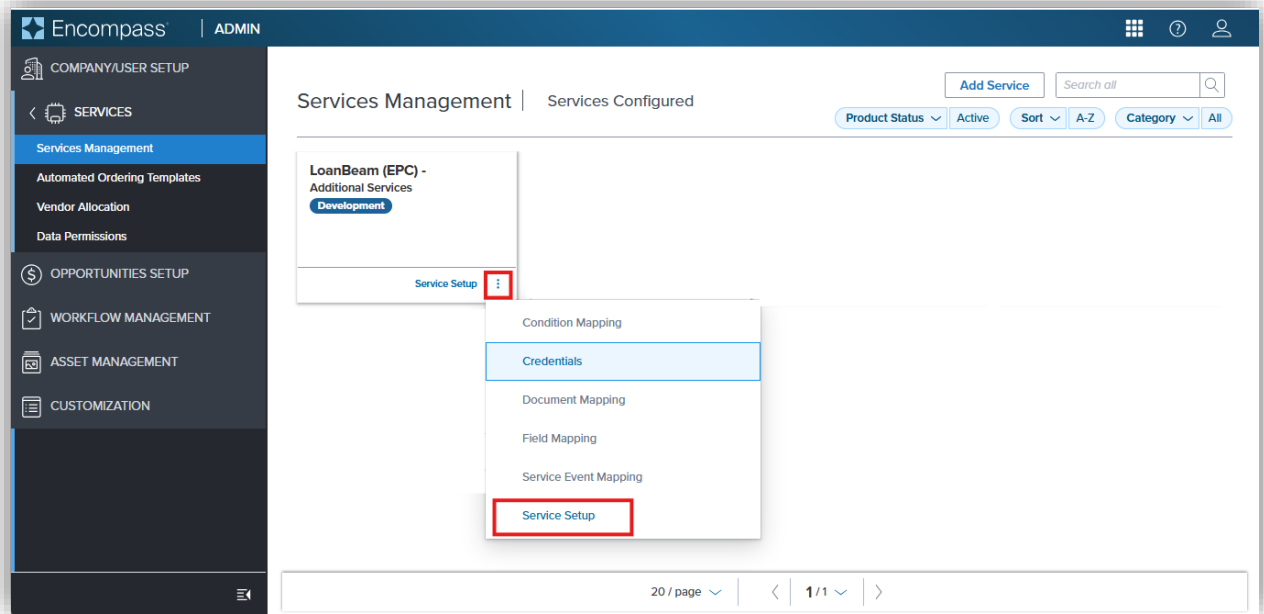13. Navigate to panel on left side of screen and click on "Services."

14. Click on "Services Management" which is in the list under "Services". This will launch the Services panel.
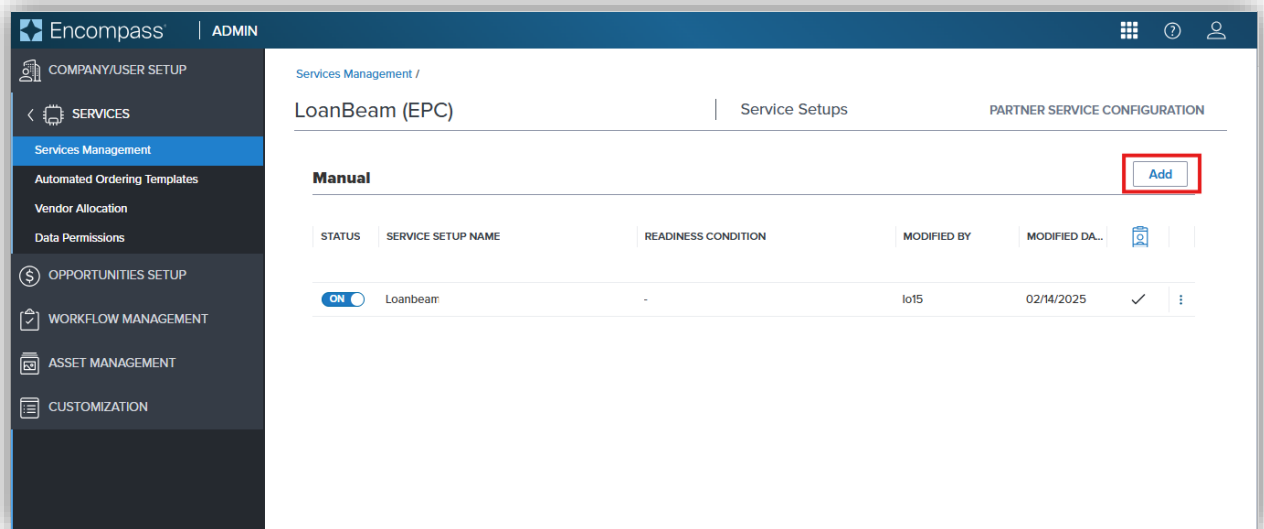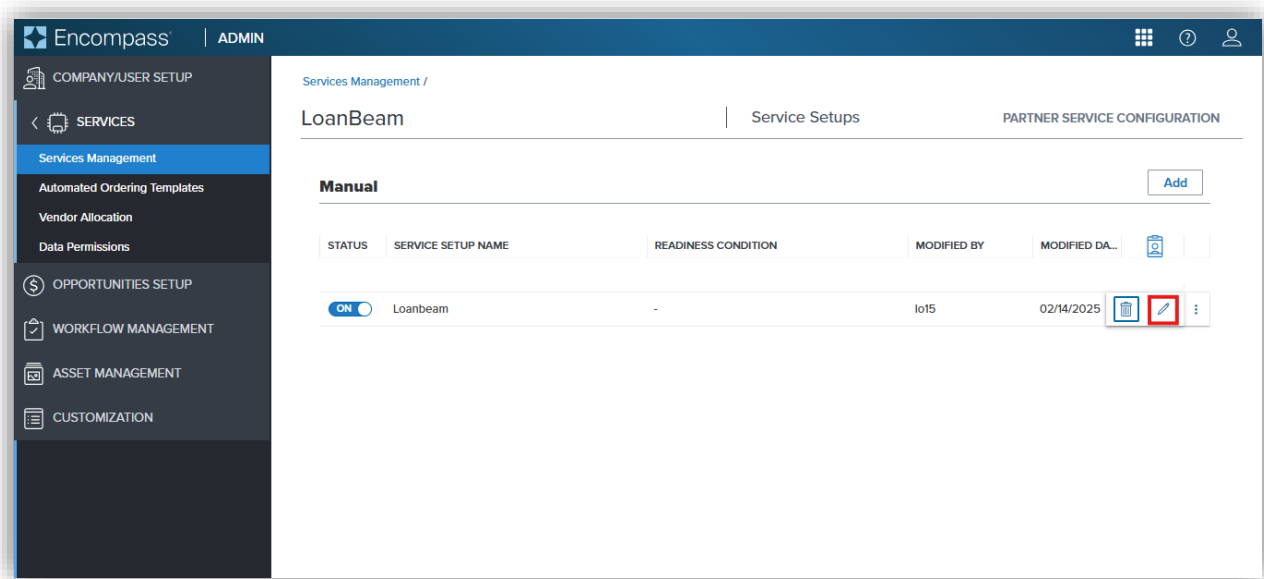

(Continued on next page.)

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

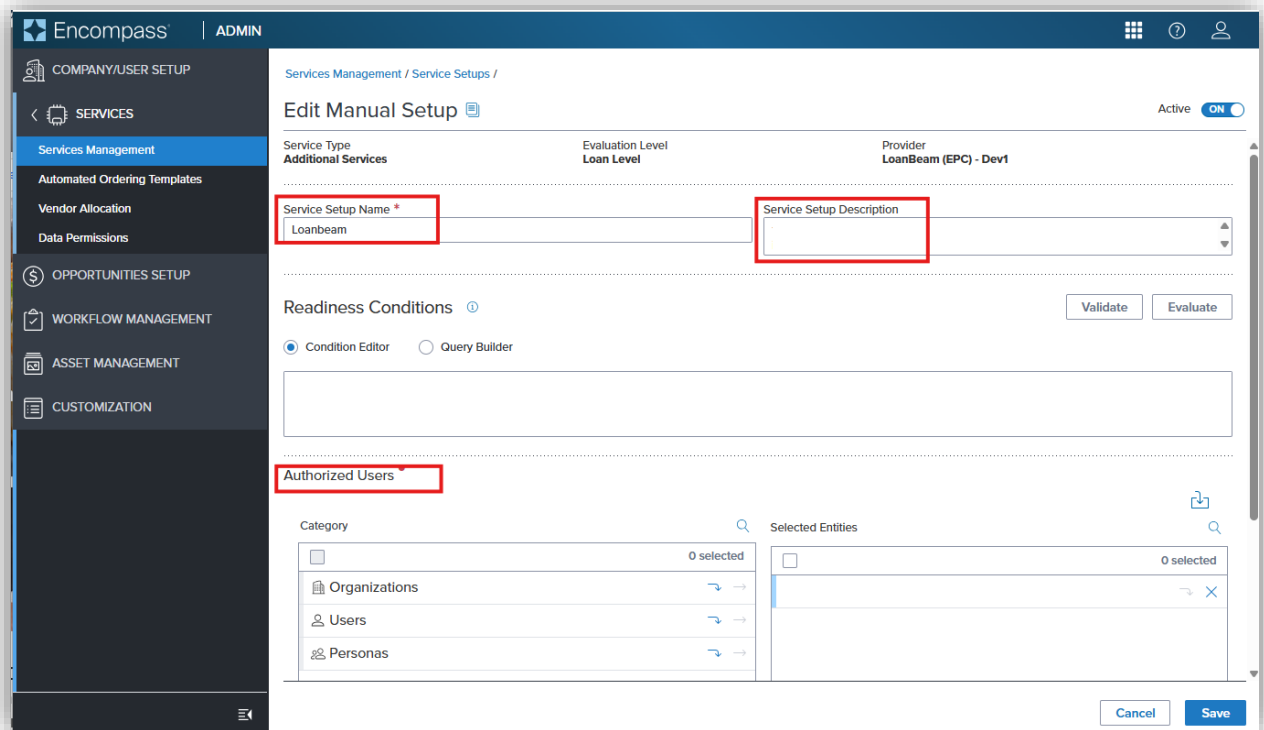16. Click on "Add" to add a new user to the related service.

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

(Continued on next page.)

18. To add a new service or edit and existing service, the following information is needed:
    a. Name of service
        i. User discretion; Example: *LoanBeam EPC*
    b. Description of service
        i. Optional, but recommended; Example: *This is LoanBeam Income Service. Contact your account administrator if changes are needed.*
    c. Select an individual or group that is authorized to use this service.
        i. User discretion; Example: *LoanBeam User or LoanBeam Usergroup*

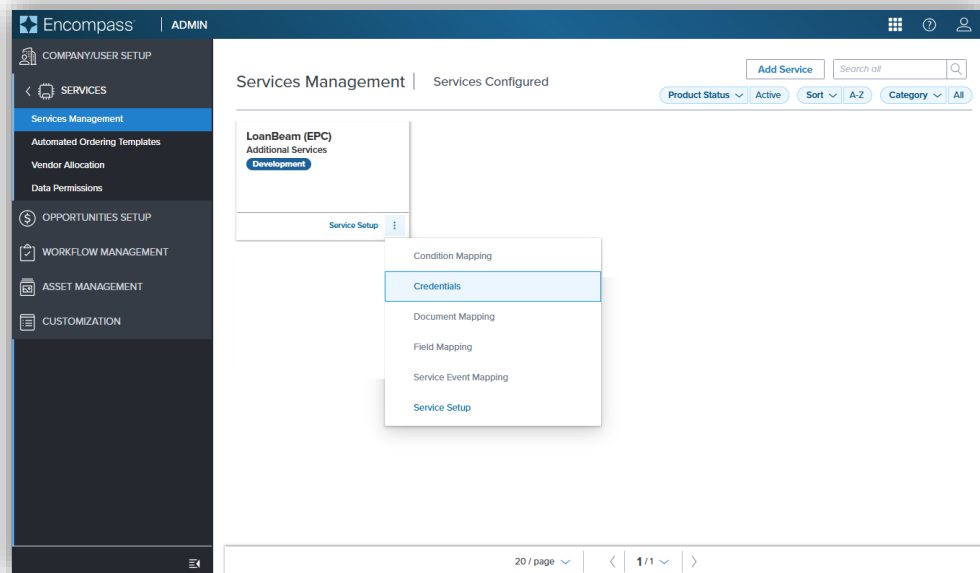Review the service and use the slider to activate the service.

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

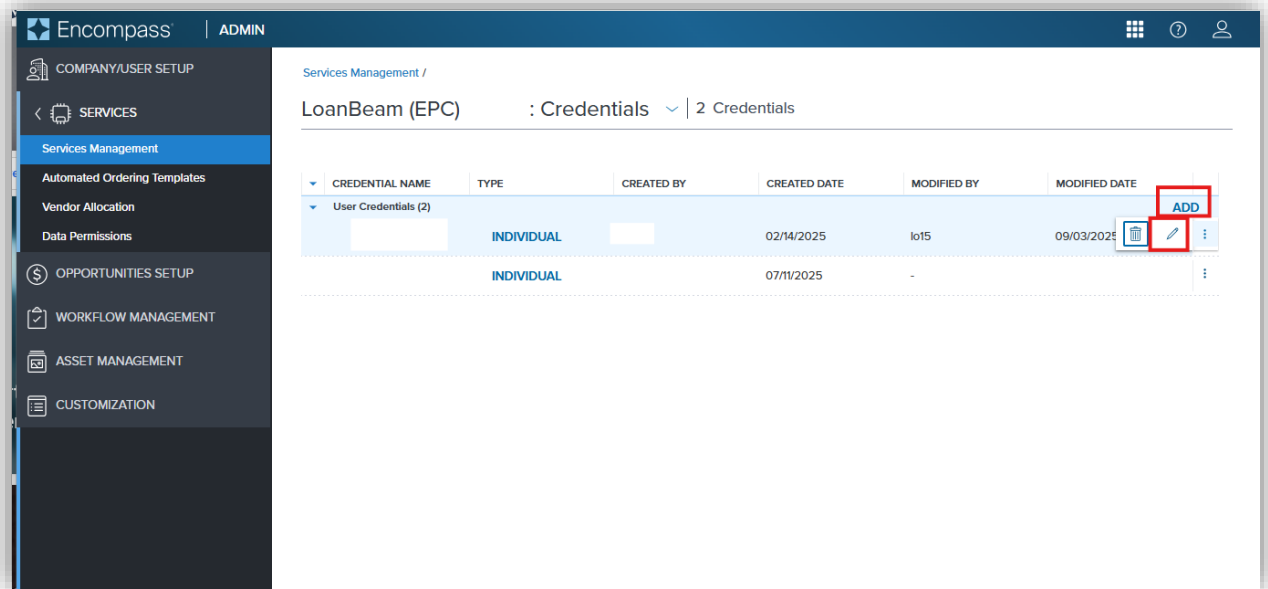Click "Save" on bottom right to save settings and close this screen.

19. Click on "Services Management" to navigate back to Services Management screen.
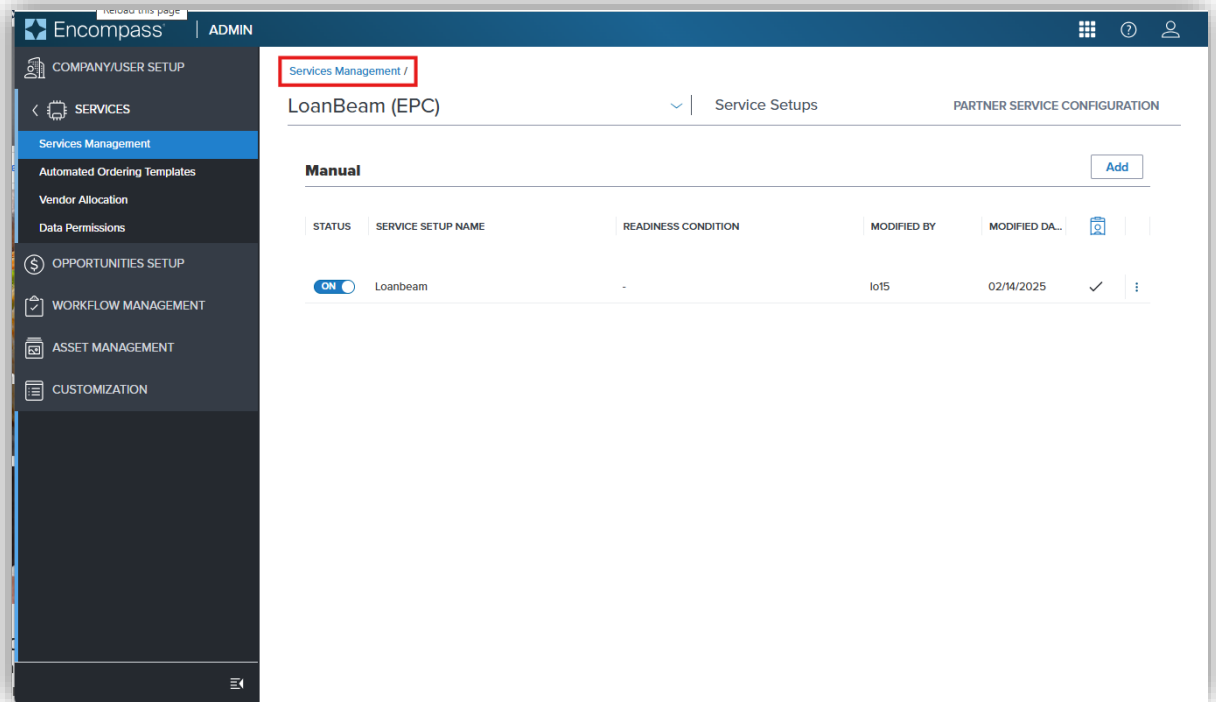
20. Click on "Credentials" menu as shown below.

21. Click "ADD" to add a new user or click on the pencil icon to edit attributes of an existing user:

(Continued on next page.)

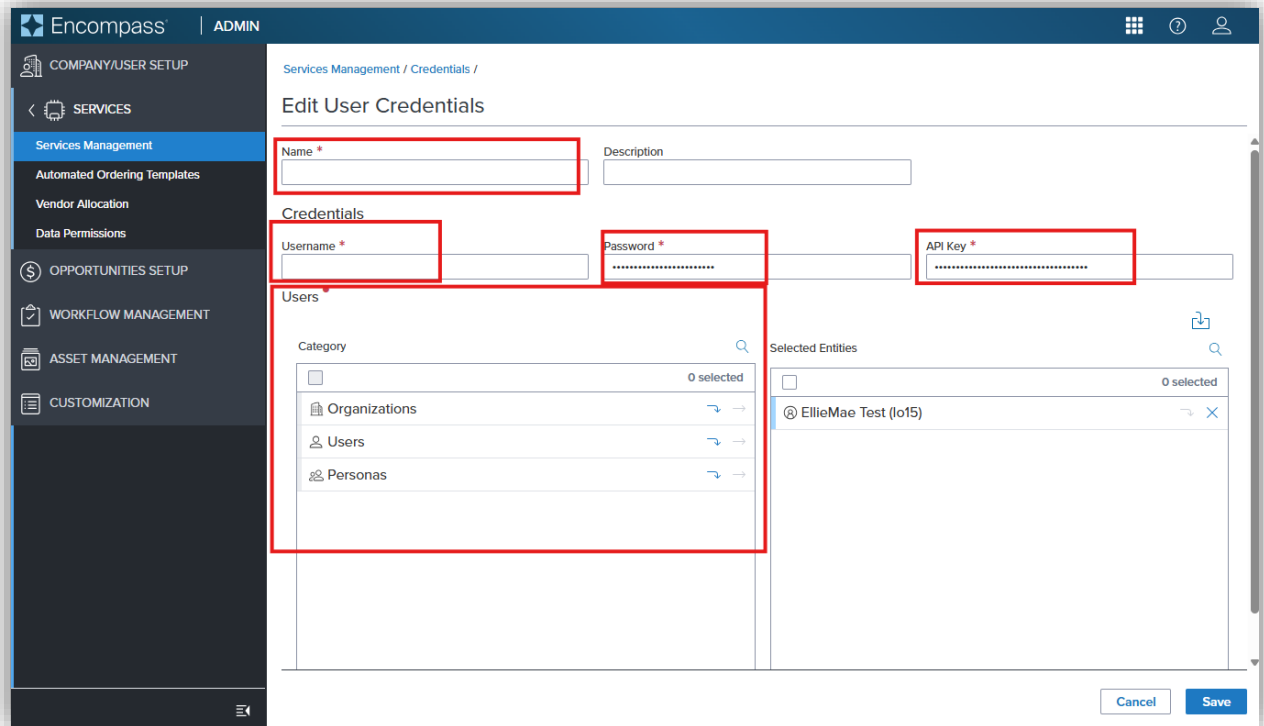22. Enter the following user credentials on the screen below:
   a. Name of LoanBeam (EPC) user
   b. Description (optional, but recommended)
   c. Credentials – these are the same credentials as required to access the LoanBeam application:
      i. Username
      ii. Password
      iii. API Key (copied from LoanBeam application)
      Note – Only one set of LoanBeam Admin credentials are needed for the API. It is NOT required that each individual user's LoanBeam credentials are set up.
   d. Users - Select an individual or group entity to provide access.

   Click "Save" to save the new credentials.

(Continued on next page.)

Important Note: The user will get the below error if there is an error with the account:

- *Unable to process your request. Please contact your Encompass Administrator.*
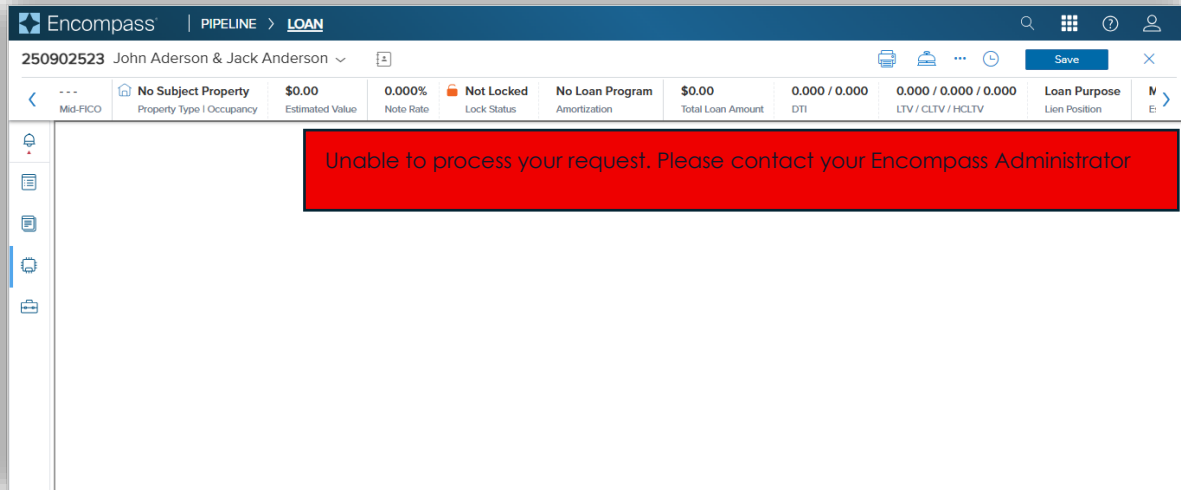
The user must contact his/her administrator to review their LoanBeam credentials.

- The API Key will not be recognized if a space was entered after the credentials.