

# DATA SHEET



## The Encompass/Whiteboard Mortgage CRM Integration

### Whiteboard is a proud member of the Ellie Mae Partner Program

Ellie Mae has more than 500 official partners in their ecosystem and as such is keenly focused on establishing and maintaining a valuable, consistent relationship with Whiteboard Mortgage CRM. Each licensed partner has robust integrations with Encompass. For these vendors, like Whiteboard Mortgage CRM, Ellie Mae ensures the partner has the ability to represent themselves as an Ellie Mae partner and meet lender's expectations.

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### Integration Prerequisites and Expectations

For the integration to work, there are two critical requirements enforced by Ellie Mae that must be completed prior to beginning the integration setup.

The first requirement asks for the creation of an API user in your Encompass instance. In other words, a special kind of user must be added to Encompass. In some organizations, this is handled by the Encompass system administrator. Ellie Mae has provided detailed instructions on how to create this kind of user which we can share with you. Without this API user, the integration will not work, so it is best that you first confirm with whoever administers your Encompass system that creating this API user will not be an issue.

The second requires that your organization has access to Ellie Mae's Developer Connect portal. Again, the person responsible for managing and administering your Encompass will know if your organization has access to the portal. Since this is also a mandatory requirement enforced by Ellie Mae, if your organization doesn't currently have access to the Developer Connect portal, your Ellie Mae Relationship Manager can help you get access to it.

Once you have verified that these two requirements are met, Whiteboard CRM can then begin the process of setting up the integration, which can take a couple of weeks to complete. If there is a technical contact from your organization who can be contacted during the setup process, please share their contact information with your Whiteboard CRM Success Coach.

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### How the Integration works

An office-wide integration that automatically updates & synchronizes your Encompass LOS loan data to your Whiteboard CRM office, eliminating data re-entry or management of records across two different systems. The integration brings the power of Whiteboard's Playbook campaigns to your LOS data. It's a fully automatic, hands-free integration that does not require any of your time after setup to let you focus on closing more loans.

### Integration Details

- Real-time, automatic synchronization of loan, borrower, co-borrower, and partner (business) data from Encompass to Whiteboard. Make a change in Encompass and see it in Whiteboard within seconds.
- Optionally, re-sync Encompass records that have already been imported and overwrite the corresponding data in Whiteboard.
- Easy identification of records in Whiteboard that are linked to records in Encompass.
- Automatically syncs contact data under the appropriate Loan Officer's team in Whiteboard.
- Intelligent integration process updates existing records based on flexible rules instead of creating duplicates.
- Integration only pulls "core" contact data points into Whiteboard – sensitive details like financial information are left in the LOS where they belong.

### Pricing

Free! Whiteboard does not charge anything for the Encompass integration.

### What you need/what to expect

An active Whiteboard CRM subscription

Encompass Banker edition (the Broker edition CAN'T support API integrations)

An Encompass "API User"

NOTE: your organization's Encompass administrator will need to create the API User. This is a requirement for integrations by Ellie Mae. This user will only have access to data folders that you deem necessary for the integration.

### Customization Options

At this time, the only customization available for Encompass integrations are the creation of custom Whiteboard campaigns based on synched datapoints. At some point in the future other customization may be available. Please reach out to your Whiteboard Sales contact for more information.

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### Technical Frequently Asked Questions (Provided by Ellie Mae)

**Q: *What are the benefits of using Ellie Mae's Application Program Interfaces (API's) vs the Software Development Kit (SDK)? Why would a Lender want or need to switch to using API's?***

**A:** The benefits to a lender of using Ellie Mae's APIs rather than the SDK include but are not limited to:

- **Better control and technology management**
  - The SDK technology allows for direct access to Encompass fields to make updates (e.g., add, edit, delete info). If Ellie Mae makes changes to code or deprecates part of the codebase, this can break solutions that are built at a field-level.
  - Ellie Mae's APIs provide a degree of freedom and flexibility for integration. The API is a consistent layer over the platform that hides the complexity of having to know or track field level details; and, if updates to the Ellie Mae code base are made, the API interface does not change. Ellie Mae is also able to continually expand API endpoints without impacting the platform core code.
- **Access to the broader developer community**
  - The SDK is built on a Microsoft .Net framework, which requires developers to master this language for coding.
  - The APIs are language agnostic. Developers can code in .Net or a variety of other current coding languages.
- **Performance**
  - The APIs provide measurable improvements to response time in many areas including 'open loan' and 'create loan' activities.
- **Mitigate risk and exposure to lender's sensitive data**
  - SDK access is typically granted through sharing Encompass user credentials and passwords at a system administrator user level.
  - With the APIs, customers can use an API User/API Key to grant partners the authority to pass code through the API Gateway to a lender's Encompass environment rather than accessing the lender's environment directly. No sharing of passwords. No need for partner to directly access the lender's Encompass environment.

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## **The Encompass/Whiteboard Mortgage CRM Integration**

*For additional technical questions, please contact your Encompass representative.*