How To Create/Edit Custom Print Forms

1. Login to Admin account.
2. Click on Encompass, settings.
3. Click on Loan Setup, Custom Print Forms.
4. Click the add button on top right and create a name for your form.
5. Click on it to start editing/creating your form.

How to Allow Access To Custom Print Forms To A Specific User Group In Encompass

1. Login to Admin.
2. Click on Encompass, settings.
3. Click on Company/User Setup, User Groups.
4. Either select or create a group in section number one to the left.
5. Click on Resources on the menu tab under section 2.
6. Under the sub-section named Custom Print Forms, click the add button and the companywide folder to all the forms you want the user group to have access to by clicking on the form name and selecting the green check mark.
7. Make sure to click save and then close.

How The Selected User Group Members Access and Print The Form

1. Open a loan.
2. Click on the print icon in upper right.
3. Select custom forms on the menu bar and make sure you are looking in the Companywide folder.
4. Select the form you are wanting and click on the add button.
5. You may now preview, edit, print, or print to file.

How to Input Field IDs (Pull information from Encompass)

1. Open custom print form.
2. Use the box that opens with the document titled "Insert Fields"
3. You can either search for a field ID in the search box (this is sometimes unreliable), or go to the specific field ID in Encompass and hover over the box to see the field ID code.
4. Select "insert other" and manually type in the Field ID and select OK which will embed the ID in the document.
5. Make sure to always save the document before closing out.