Building and Expanding a Custom Form in Input Form Builder

1. Open Encompass Input Form Builder
2. Log-in
3. File, New Form
4. Begin customizing your form with labels, dropdowns, category/group boxes, etc. You edit and customize all these tools and controls by clicking on the item and using the menu on left.
5. IMPORTANT NOTE: In order to eventually be able to edit the form by all users in Encompass, you must assign a field to every input on the form whether it is a text box, a drop down, etc.
    a. Click on the textbox, dropdown field, etc.
    b. On the right menu bar underneath Data click the field box once, and then click the three dots.
    c. You must either click a previous field already inputted such as "Borrower Name" or create a new custom field. To create a custom field follow steps d-i.
    d. Go into Encompass.
    e. Go to Encompass, then settings in the top left.
    f. On the left menu bar, click Loan Setup, and then Loan Custom Fields.
    g. Click the new button with the green plus sign on the top right.
    h. You must create a Field ID and Description for this new custom field. NOTE: All custom fields begin with CX.
    i. You must choose a format (the most common are string, dropdown, or Y/N). If you choose the string option you must specify the max number of characters you want to allow. Click Ok.
    j. In Custom Form Builder, after following step c., your field should be assigned. NOTE: When assigning a field, note that standard fields are the ones already created and in the system. If you created a new one, your will need to click the custom fields tab in the field selector instead of the automatic standard fields tab.
    k. Make sure to save and the changes.

Steps to make sure the form is available to users and on form list in Encompass

1. Log in to Encompass
2. Go to Encompass, settings
3. Click on Loan Template, Input Form Sets
4. Make sure to add the form to all of the Input Form Sets you want it to appear under by clicking on them.
5. Find the form name under the Predefined Input Forms List
6. Click on it, click Add
7. To change the location of where the form appears on the list, click on it in the Selected Input Forms List and use the arrows to move it up or down.
8. Make sure to select save each time you add the form to one of the Input Form Sets.

1. Log in to Encompass
2. Go to Encompass, settings
3. Click on Company/User Setup
4. Click on Forms/Tools
5. Click on personas listed in column 1 to the left (example: LO, Loan Processor, etc.)
6. Select the Input form so that a check mark appears on the form you want each individual group of personas to have access to.
7. Click save and then close.