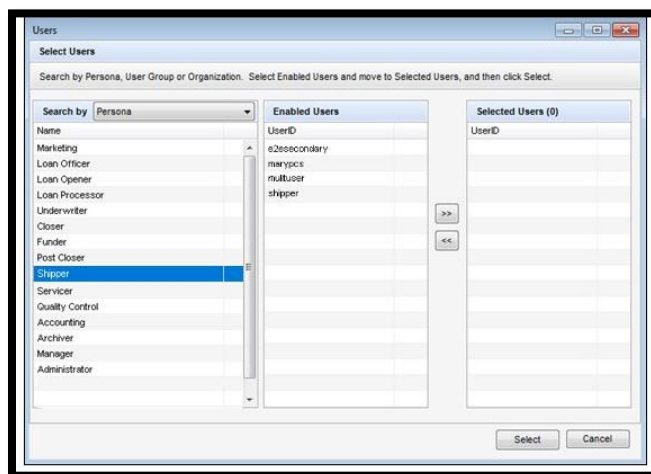# Encompass Investor Connect Tips

1. **Setup Partner Account**
   - Start from an open Encompass session. Select "Settings"
   - Click "Company/User Setup", then click "Services Password Management". Click the "New" icon
   - On the "Accounts Details" window, select an option from the "Services Category" drop-down list
   - Select "PHH Mortgage" from the "Provider Name" drop-down list. More fields will display. Enter a "Description" for the service; "Partner Account"
   - Next enter the account "Username" and account "Password".
     Username: PHH Mortgage   Password: 5 Digit Client ID
   - Click the "Find" icon next to the "Selected Users" field
   - When the "Select Users" window displays, select a "search category" (Persona, User Group, or Organization) from the drop-down list at the top of the "Search By" panel, and then select "**search options**" in the list in the Search by panel.
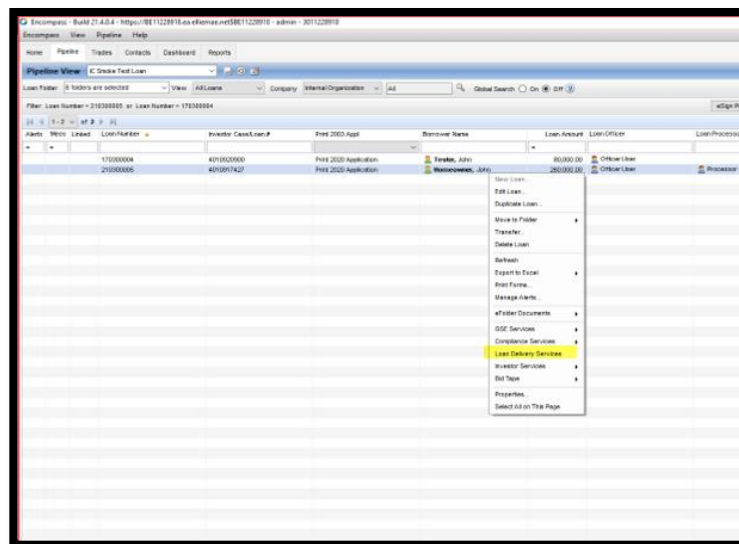

   - In the "Enabled Users" panel, select the "users" who are authorized to deliver loan data and documents to the partner, and then click the ***right arrow*** to move them to the "Selected Users" panel.
   - Repeat steps 9 and 10 until all users have been selected, and then click "Select".

NOTE: Once setup is complete, PHH Mortgage will be available in the Lender's list of Investors in the "Loan Delivery Service". *Please be aware that **only closed loan files** can be submitted through Investor Connect.* The lender is now partnered with PHH Mortgage and are ready to deliver the closed loan files.

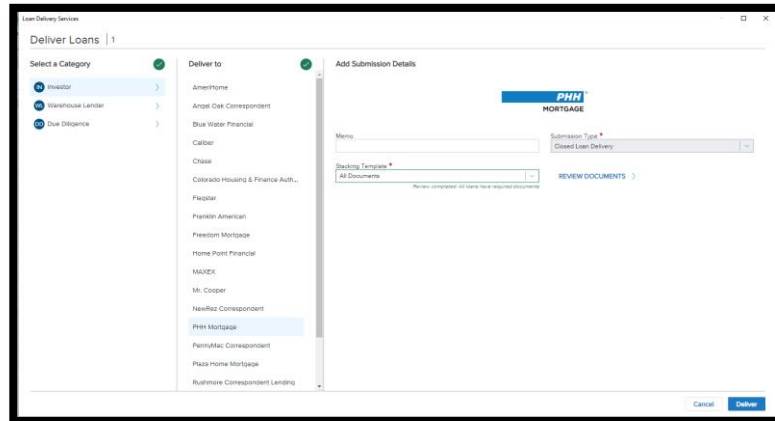## 2. Access Encompass Investor Connect for Loan Delivery Services

- "Select" one or more loans on yours "Encompass Pipeline":
    - When delivering 50 or fewer loans, *manually* select the loans on the Encompass Pipeline
    - When sending a *batch delivery* (51 to 1500 loans) use the "Loan Folder" drop-down list in the "Encompass Pipeline" to select the folder you want to access and then use the filter fields at the top of the "Pipeline" columns to filter for the loans you want to deliver.
- "Right click" the selected loan or loans
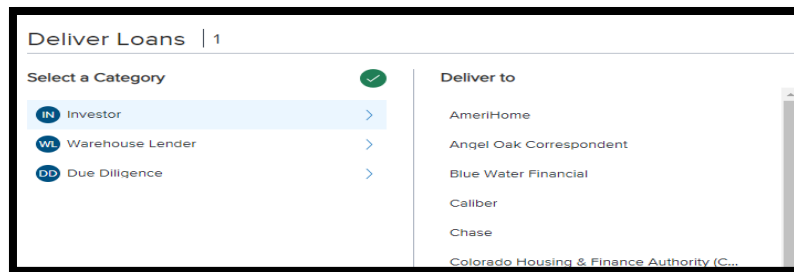- Click the "Loan Delivery Services" option

- The "Deliver Loans" window opens.

3. Deliver Loans Window

- The "Deliver Loans" window provides a central location where the users can select an Encompass Investor Connect service category, specify the partner who will receive the loan file and complete details about the submission.
- The "Select a Category" column on the ___left___ lets the lender select the Encompass Investor Connect service category.
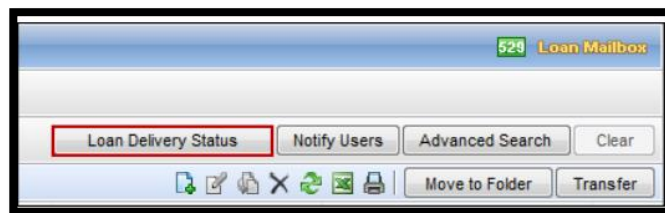
- A list of the available partners for the selected category displays in the "Deliver to Column" in the center of the window.

4. Delivery Statuses

- Click the "Loan Delivery Status" button on the Encompass Pipeline

- The "Loan Status Delivery" window opens. The number of records is listed at the top.

- In the *upper right corner*, click the Refresh Icon ⟳ to update the page content.

5. Tips to Address Errors

Tip #1- Confirm the PHH Loan number in the Investor Number field.

Tip #2- Is the package being submitted over 200MB? While Investor Connect can accept 400MB, PHH's internal document indexing system is limited to 200MB.

Tip #3- Did you already submit the loan on TPO Connect? If so, we will not be able to accept the loan delivery via Investor Connect.