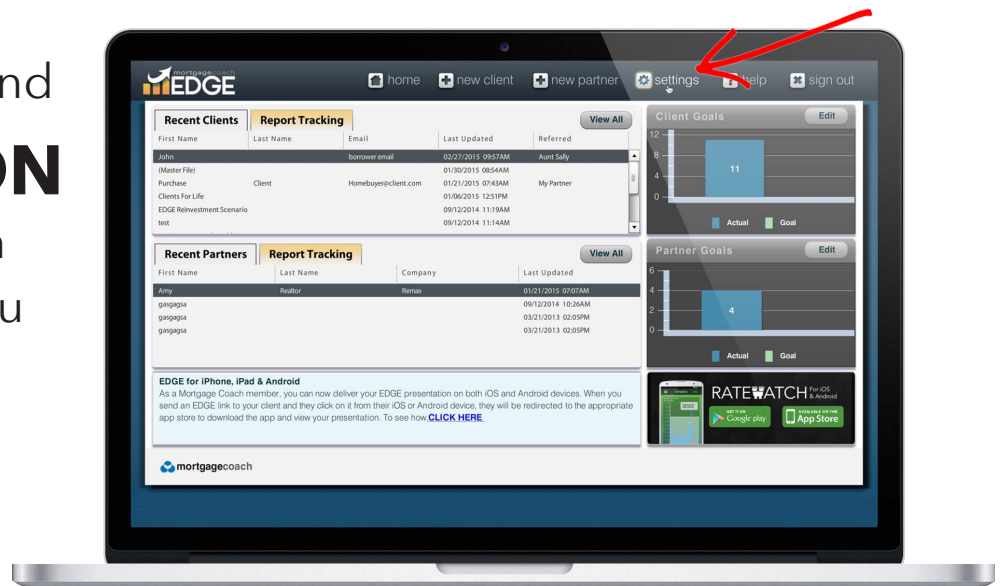


HOW TO USE THE ENCOMPASS INTEGRATION

1

LOGIN and **CLICK ON SETTINGS** in the top menu bar.

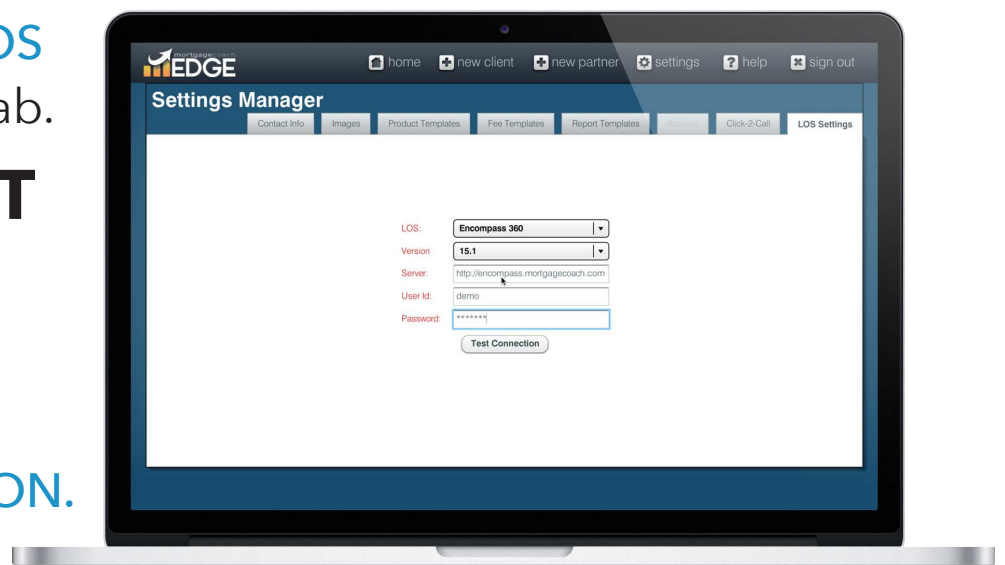


2

Go to the **LOS SETTINGS** tab.

FILL OUT the fields.

CLICK TEST CONNECTION.

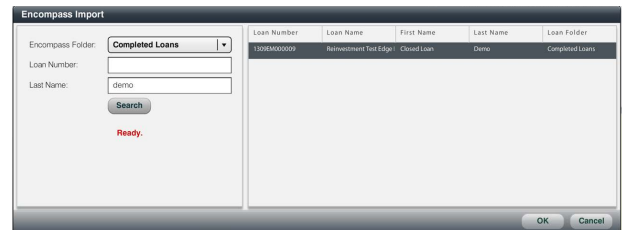
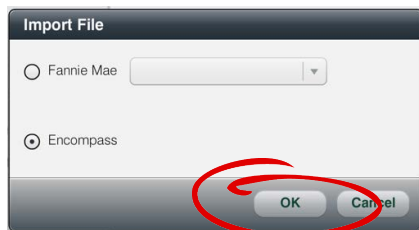
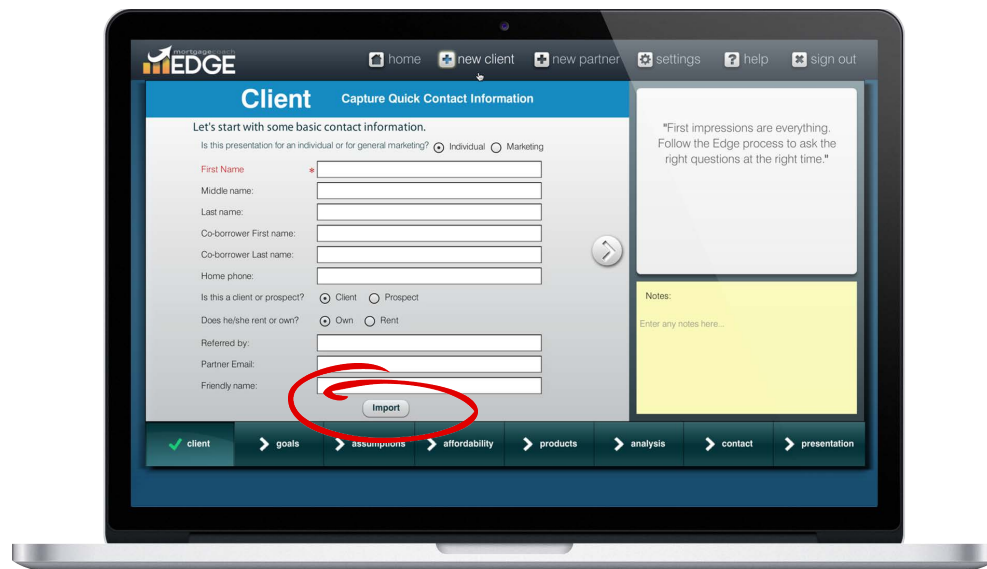


By default, Encompass 360 will be selected in the LOS field. **SELECT** the **VERSION** you are using. **TYPE IN** your **SERVER ADDRESS*** as seen in the top window bar of your Encompass login screen. **TYPE IN** your **USER NAME** and **PASSWORD** for Encompass. Then **CLICK ON TEST CONNECTION**. **CLICK OK** on the resulting pop-up window.

* Make sure to put in **HTTPS://** as seen in your entire server address

3

CLICK ON NEW CLIENT on the top menu bar.
Click on **IMPORT**. Select **ENCOMPASS**.



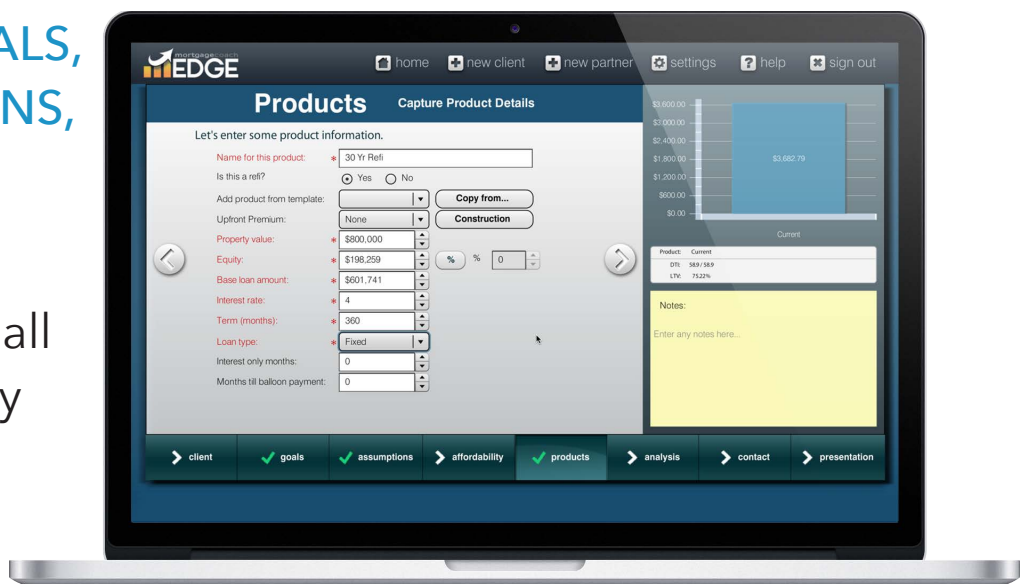
Search for and Select the loan you would like to import.
Click **OK**.

4

**CLIENT, GOALS,
ASSUMPTIONS,
PRODUCTS**

pages:

TYPE IN all
the necessary
information.



Click on the right arrow to move to the following pages.

7

VIEW the resulting graphs and charts in the **ANALYSIS SUMMARY**.



8

In the **PRESENTATION** page, **CLICK ON GENERATE LINK** to grab the shareable link to your completed report.

