

## Blue Water Financial Addendum to the Encompass Investor Connect Lender User's Guide

Complete the following steps to successfully deliver loan packages to Blue Water Financial through Encompass Investor Connect.

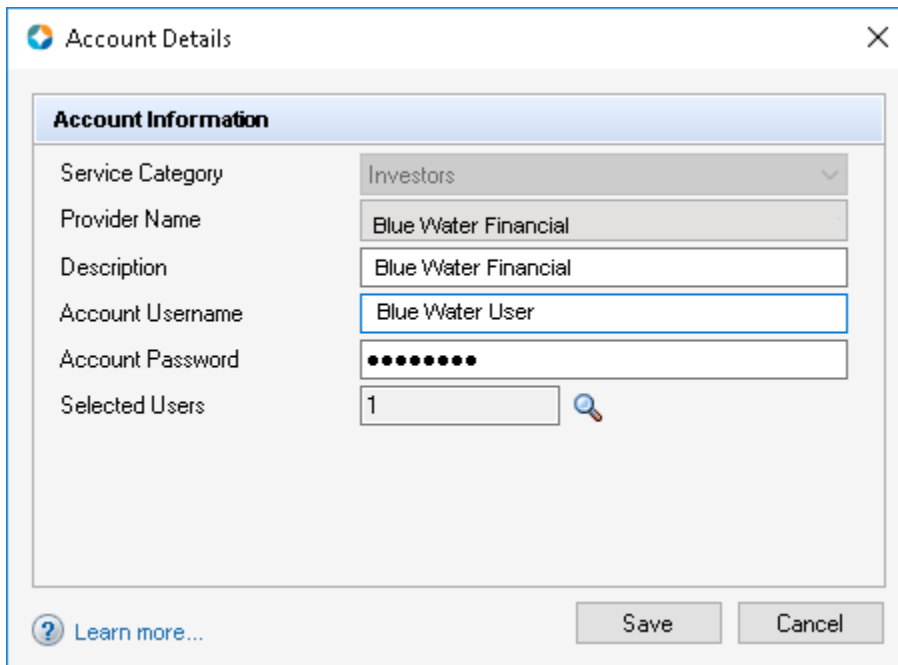
**IMPORTANT:** Use Encompass Investor Connect to deliver loans to Blue Water Financial for Closed Loan Delivery.

### Configuring Your Investor Connect Setup

Your administrator needs to complete the following steps when configuring Encompass Investor Connect in the Encompass settings.

#### Services Password Management

Your Encompass administrator must follow these guidelines when creating the Account Details entry for Blue Water Financial in the Services Password Management setting (**Encompass > Settings > Company/User Setup > Services Password Management**):



- Enter your **Company's Username** in the Account Username field. If you do not have a username, contact your Blue Water Financial Representative for help.
- Enter your **Account Password** in the Account Password field.

### Submitting Data and Document Packages

Encompass users must follow these guidelines when submitting data and document packages.

On the drop-down list in the Add Submission Details section of the Deliver Loans window:

- Select **Registration** or **Closed Loan Delivery** from the **Submission Type** drop-down list.
- Select a **Stacking Template** when choosing **Closed Loan Delivery** from the drop-down list.

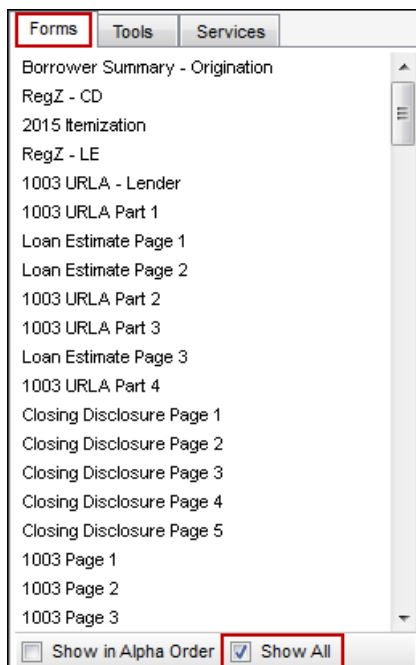
## Required Data Fields

For a Closed Loan Delivery Submission Blue Water Financial requires the below from the loan file submitted through Encompass Investor Connect to match the loan.

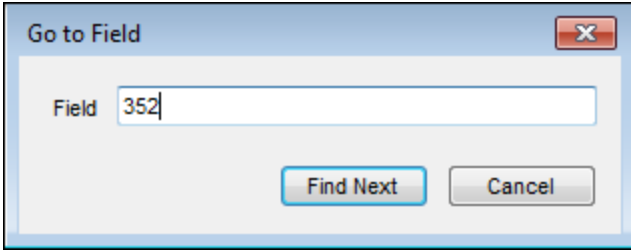
- Investor Loan Number (Encompass field ID 352)

### To Add this field:

1. Open the loan file, click the **Forms** tab in the lower-left panel, and then select the **Show All** check box.



2. Press **Ctrl+G**.
3. Type **352** in the field and click **Find Next**.



4. This takes you to the fields. Enter the information, and then save the loan.