

MetaSource Addendum to the Encompass Investor Connect Lender User's Guide

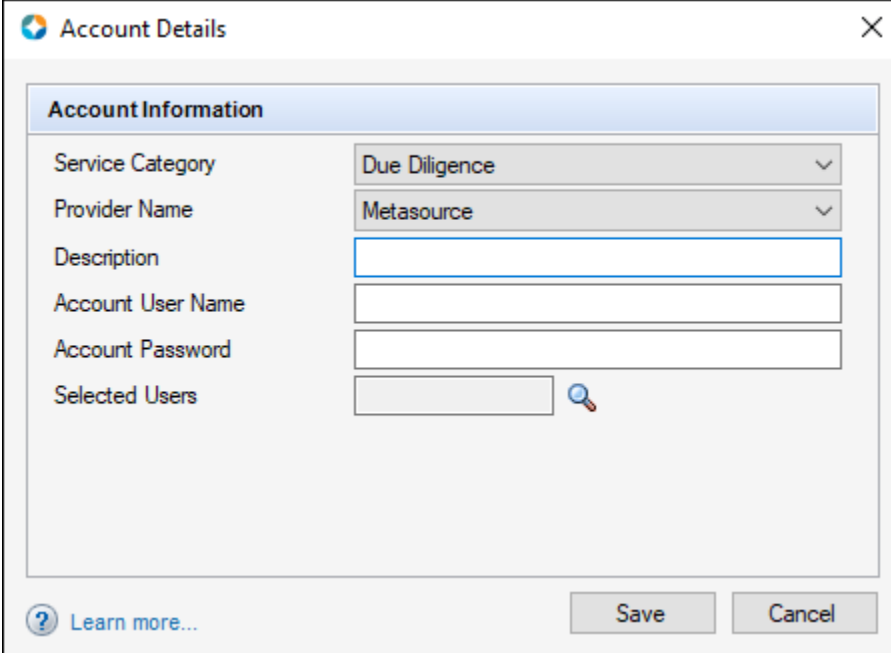
Complete the following steps to successfully deliver loan packages to MetaSource, LLC through Encompass Investor Connect.

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 MetaSource in the Services Password Management setting (**Encompass > Settings > Company/User Setup > Services Password Management**):



Account Information	
Service Category	Due Diligence
Provider Name	Metasource
Description	
Account User Name	
Account Password	
Selected Users	

Please contact AuditServices@MetaSource.com for your Account User Name and Account Password.

Submitting Loan Packages

Encompass users must follow these guidelines when submitting loan packages:

- On the Add Submission Details section of the Deliver Loans window:
 - Select from the **Submission Type** drop-down list.
 - Select a **Stacking Template** from the drop-down list.

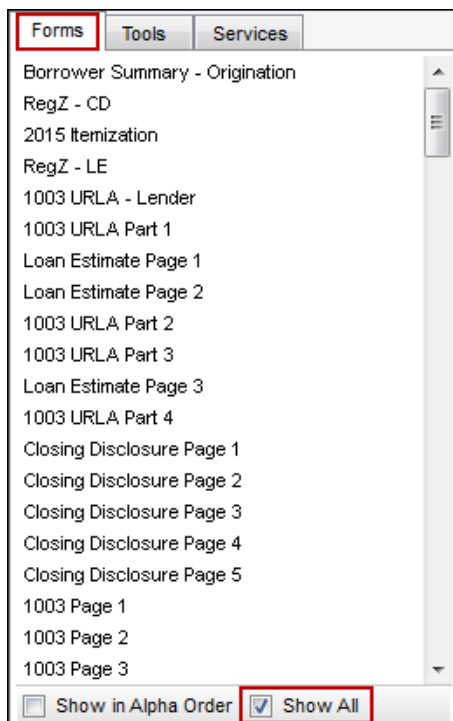
Required Data Fields

For a smooth Loan Delivery, MetaSource requires that the following fields be completed in a loan file submitted through Encompass Investor Connect:

- Loan Number (Encompass field ID 364)
- Borrower Last Name (Encompass field ID 4004)
- Loan Type (Encompass field ID 1172)
- Purpose of Loan (Encompass field ID 19)
- Loan Amount (Encompass field ID D 1109)

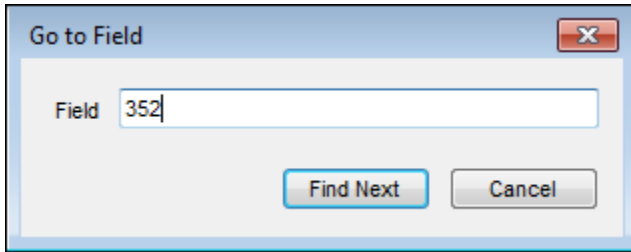
To Add these fields:

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 the **Field ID** in the field and click **Find Next**.



The image shows a dialog box titled "Go to Field". It contains a text input field with the label "Field" and the value "352". Below the input field are two buttons: "Find Next" and "Cancel".

4. Encompass opens an input form with the field highlighted. Enter the information, and then save the loan.