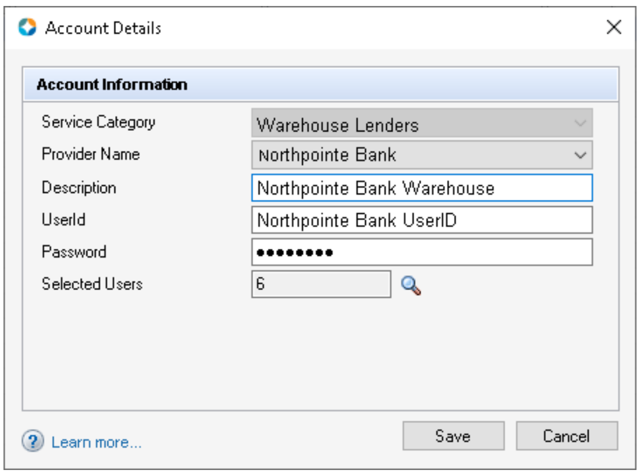
Northpointe Bank Warehouse Addendum to the Encompass Investor Connect Lender User's Guide

Services Password Management

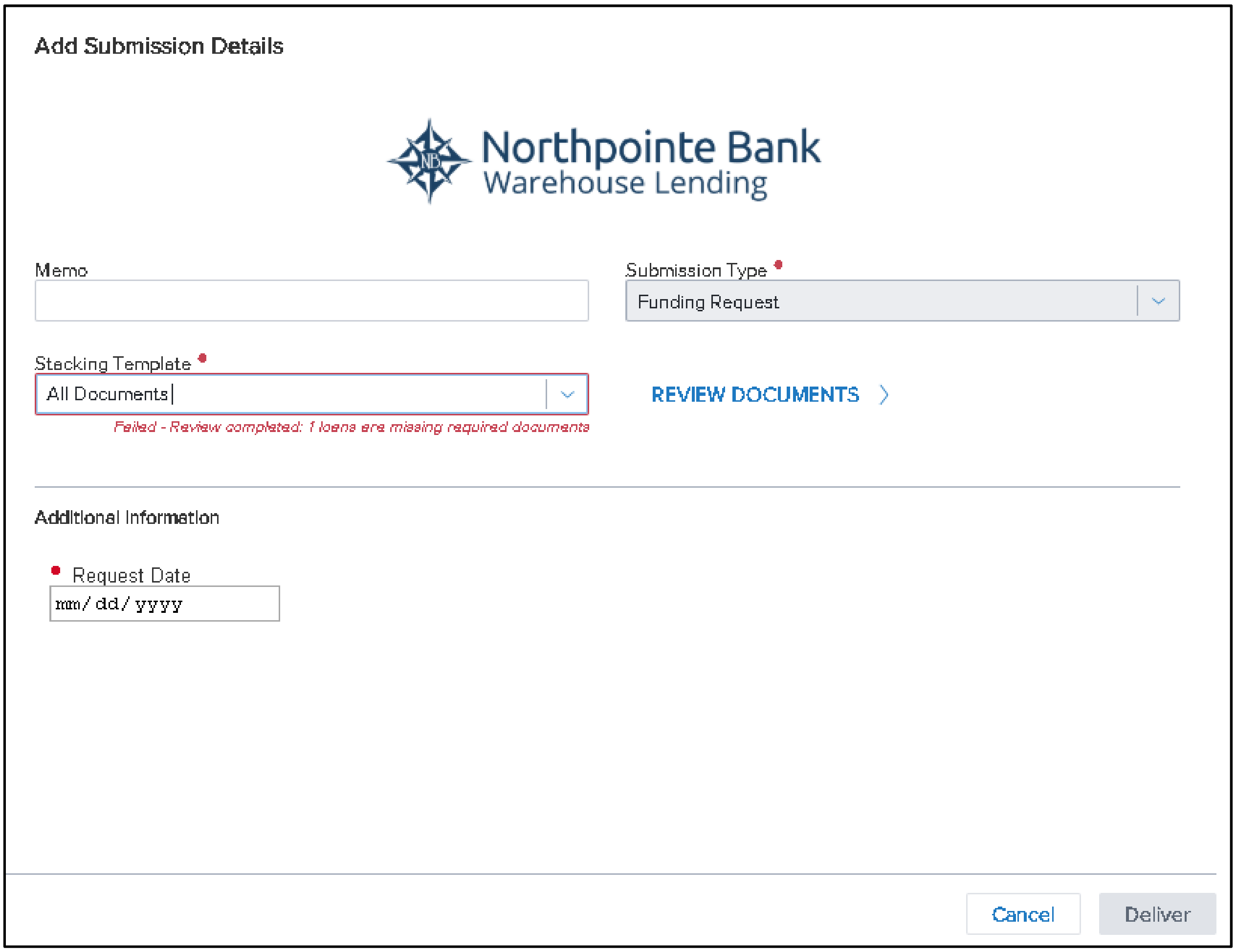
Your Encompass administrator must follow these guidelines when creating the Account Details entry for Northpointe Bank Warehouse in the Services Password Management setting (**Encompass** > **Settings** > **Company/User Setup** > **Services Password Management**):



1. For username and password information, please email clientsupport@northpointe.com.
2. For login support or assistance with password resets, please email: clientsupport@northpointe.com.

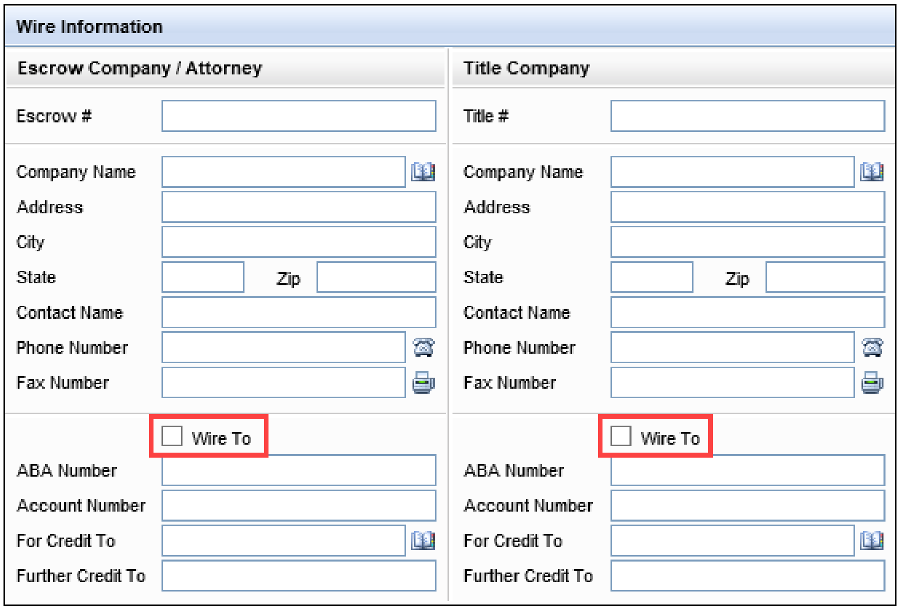
Funding Request Submission Type

- **Funding Request -** A funding request to advance on the warehouse line and release funds via wire transfer to approved closing agents.
- **Request Date -** The date that the wire will be sent.



Wire To Check Box on the Funding Worksheet

Also, select one of the **Wire To** check boxes (field ID 2001) in the Wire Information section on the Funding Worksheet tool to ensure that the correct wire information is sent to Northpointe Bank Warehouse.



Required Fields

The Seller Loan Number (field ID 364) in Encompass is required to be completed before the system will let you move forward with submission.

Loan Status

After you send loan data to Northpointe Bank Warehouse, the status of each funding request is shown in the Loan Status Delivery window in Encompass. You'll find an explanation of each status in Chapter 4 of the *Encompass Investor Connect Lender User's Guide*. Below is additional information specific to Northpointe Bank Warehouse.

- The **In Progress** status indicates that the specified loan passed edit checks and was submitted.
- The **Delivered** status indicates that the loan has been successfully submitted and the Northpointe underwriter will begin their review.
- The **Wire Sent** status indicates that the wire transfer associated with the loan has been completed.
- The **Failed** status indicates that the loan was not submitted. Please review potential errors and try to resubmit.

Funding Cut-Off Times

Any funding requests that are submitted past the company's cut-off time will show a status of **Delivered**.

Frequently Asked Questions

Q: Is there a way to see the loan status without having to go back into each loan file?
A: Yes. You can easily customize the fields in the pipeline view. For detailed information, refer to the *Add or Remove Columns* section in the *Creating Custom Views* topic in the Encompass online help.

Q: Is there a way to automate importing the funding details into the funding worksheet?
A: Yes, if your company uses enhanced conditions. For detailed information, refer to the Enable Auto Imports and Auto Import Workflow topics in the Encompass Investor Connect online help.