

## The Money Source (TMS) Addendum to the Encompass Investor Connect Lender User's Guide

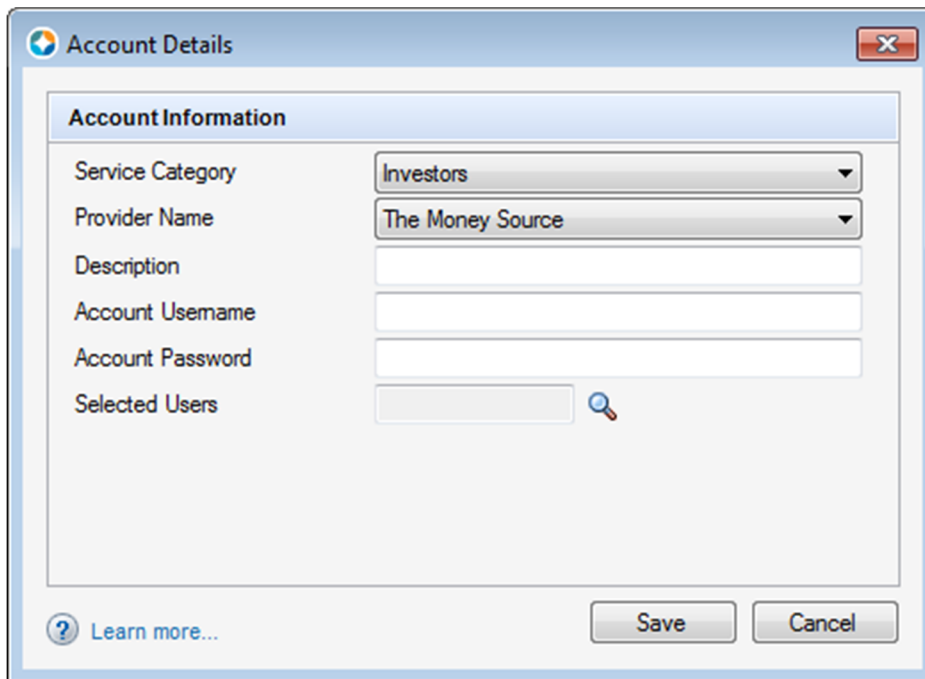
Complete the following steps to successfully deliver loan packages to The Money Source through Encompass Investor Connect.

### 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 The Money Source in the Services Password Management setting (**Encompass > Settings > Company/User Setup > Services Password Management**):



1. Your Encompass administrator must use your company's TMS Client ID for the Account Username. The administrator can choose the password.

**NOTE:** The TMS Client ID is case sensitive.

2. After completing the entry in the Services Password Management setting, send an email to your TMS Client Liaison to let them know you are ready to begin delivering loans through Encompass Investor Connect. TMS needs to enable Encompass Investor Connect on their side.

## Submitting Data and Document Packages

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

- On the Add Submission Details section of the Deliver Loans window:
  - A selection is not required from the **Submission Type** drop-down list. Leave **Default** as the selection for this field.
  - Select a **Stacking Template** from the drop-down list.

**NOTE:** The recommended best practice is to have your Encompass administrator create stacking templates for the following TMS submission packages: TMS Legal Package, TMS Credit Package, TMS Appraisal, TMS Conditions, and TMS Trailing Docs. The TMS maximum file size for individual files in the submission packages is 400 MB.

- The **KISS User ID** is a required field
- A user must select one of the following values for the **Delivery Type**:
  - Mandatory Bulk
  - Mandatory Rate Sheet
  - Best Efforts
- When **Mandatory Bulk** is selected for the **Delivery Type**, the **TMS Trade #** is a required field.