# Wells Fargo Funding Addendum to the Encompass Investor Connect Lender User's Guide

Complete the following steps to successfully deliver closed loan packages to Wells Fargo Funding through Encompass Investor Connect. If you need help before delivery, submit a case to ICE Mortgage Technology through the [ICE mortgage Technology Resource Center](). If you need help before delivery, contact Wells Fargo Funding Web Support for assistance at 1-800-328-5074 (select option 5) or [websupport@wellsfargo.com](mailto:websupport@wellsfargo.com).

## User Permissions for Wells Fargo Funding Website (wellsfargofunding.com)

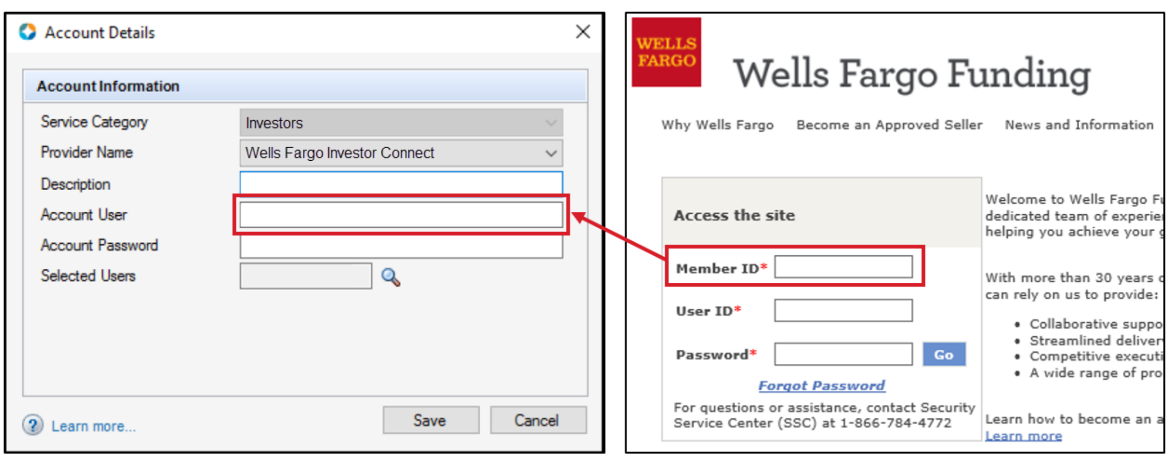
Your company's web access administrator for wellsfargofunding.com must enable the permissions below on wellsfargofunding.com so users can view the necessary data and document image delivery status pages.

- **Mandatory Loan Data Status:** Allows users to check data delivery status and obtain Wells Fargo Loan numbers for Mandatory loans.
- **View Image Status [Multi Loan]:** Allows users to check document image (Closed Loan Package) delivery status for both Mandatory and Best Effort loans.

## Services Password Management

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

1. In the Account Username field, enter your company Member ID that is used when logging on to the wellsfargofunding.com website.



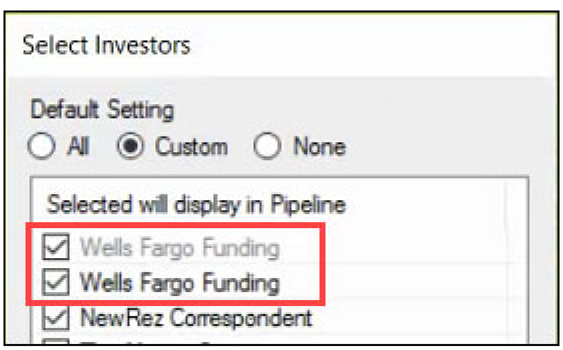

2. In the Account Password field, enter a password of your choice. The Account Password is a one-time entry. You will not need to re-enter or update this password.

## Personas Setting

When configuring persona access to the Encompass Investor Connect service for Wells Fargo Funding, your administrator must make sure the correct option is selected for Wells Fargo Funding on the Select Investors window in the Personas setting.

**To Grant Persona Access:**

1. On the menu bar, click **Encompass**, and then click **Settings**.
2. On the left panel, click **Company/User Setup**, and then click **Personas**.
3. In the left panel of the Personas tool, click to select the persona assigned to the user.
4. Click the **Pipeline** tab.
5. In the Pipeline Tasks section, select the **Investor Services** option.
6. Select one of the following options at the top of the Select Investors window:
   - **All** - Enables access to all the partners your company has added to the Investor Services category, including the option to deliver loan packages to Wells Fargo Funding via Encompass Investor Connect (Deliver to Wells Fargo Funding) if your company has made this option available.
   - **Custom** - Enables access only for selected partners in the Investor Services category. When this option is selected, two Wells Fargo Funding options display in the window:
     - To enable access to Wells Fargo Funding via the Encompass Investor Connect service, **select the second Wells Fargo Funding** option on the Select Investors window:
     - The first Wells Fargo Funding option is for the Deliver Best Effort Registration Data only to Wells Fargo service, which is an SDK-based data option not associated with Encompass Investor connect. This option is selected by default and cannot be cleared.




7. Click the **Save** icon.

## Additional Fields for the Encompass Reporting Database

Your company may want to consider adding the Investor Loan Number (field ID 352) and the Commitment Number (field ID 996) to your Encompass Reporting Database so users can add the fields as columns in a Pipeline View to quickly identify loan files with missing values. Refer to the following Encompass online help topics for details:

- Admin Tools: Reporting Database
- Creating Custom Views

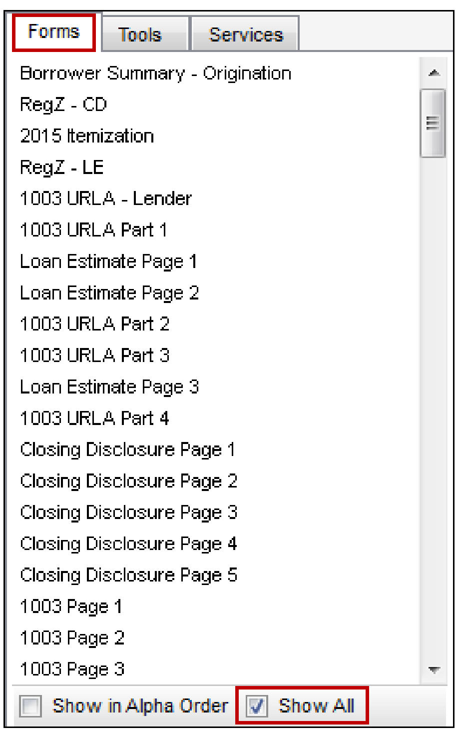
## Required Loan Fields

Well Fargo requires the following data fields:

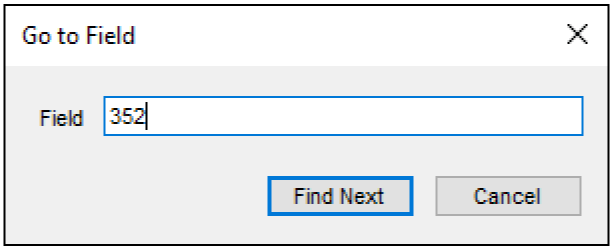
- Appraised Value (field ID 356) in all submissions. Enter the estimated value in field ID 356 if an appraisal isn't required.
- Wells Fargo Loan Number (field ID 352) for all Best Effort submissions
- Wells Fargo Commitment Number (field ID 996) for all submissions for Mandatory Commitments

### To Add the Required 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. Enter the field ID and click **Find Next**.




4. The first form on which the field is found opens with the field highlighted.
5. Enter the required information in the field.
6. Repeat steps 2-5 to complete the remaining required fields.
7. When finished, save the loan.

**NOTE:** If the investor Loan Number (field ID 352) and Commitment Number (field ID 996) have been added to your Encompass Reporting Database, you can add the fields as columns in a Pipeline View to quickly identify loan files with missing values. For detailed information, refer to the Creating Custom Views and Admin Tools: Reporting Database help topics in the Encompass online help.

### Stacking Templates

Information about setting up Stacking Templates can be found in the *Encompass Investor Connect Lender's User Guide* included with this addendum, and the Document Stacking Templates topic in the help section of the Encompass Resource Center.

Refer to Section 505 in the Wells Fargo Funding Seller Guide for specific documents to include in your Stacking Template.

**NOTE:** Taking a few minutes up front to set up stacking templates can save time in the long run. Lenders that use stacking templates often have fewer suspenses and faster funding than those that don't.

## Delivery Type

When submitting loans to Wells Fargo via Encompass Investor connect, make sure you complete the Add Submission Details section of the Deliver Loans window as follows:

1. Select the appropriate Delivery Type option (**Mandatory** or **Best Effor**t).
2. Enter your wellsfargofunding.com User ID in the **User ID** field. The User ID is case-sensitive. (An image of the User ID field on the wellsfargofunding.com log on window is shown on the next page.)
3. Select the Underwriting Type (**Delegated** or **Wells Fargo**).

The User ID field on the wellsfargofunding.com sign on window is shown below: