

# Encompass® Quick Reference Guide

## Configure Encompass Investor Connect

Before Encompass users can submit data and documents to a partner via Encompass Investor Connect, your Encompass administrator must set up an account with the partner to enable a system-to-system connection between Encompass and the partner. The administrator also needs to configure settings in Encompass to provide users with access to services and partners and to enable features as needed. If your company works with partners who have enabled the workflow for sending and receiving conditions electronically via Encompass Investor Connect, your administrator must also configure the workflow for these conditions.

