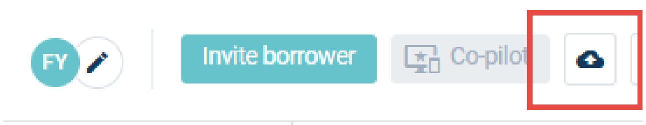
Bridge Quick Reference Guide

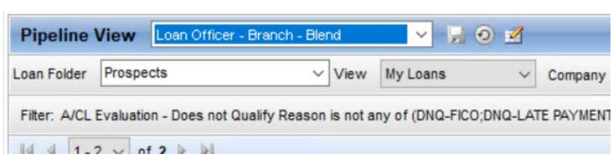
May 2020

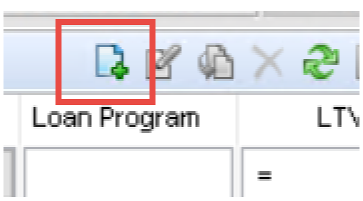
How to import a loan into Encompass-

1. **Make sure to export the loan from Bridge to be able to import loan file into Encompass.**

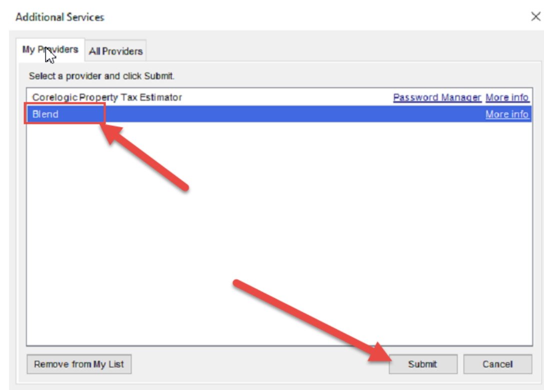


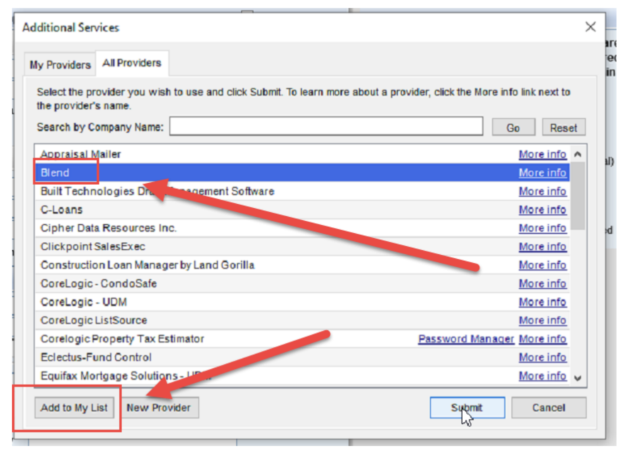
2. **Start a new loan file in your prospects folder -** Go to your Blend pipeline view in Encompass, click the paper plus icon on the top right corner of your Encompass screen. Next apply your branch Purchase or Refinance loan template set.



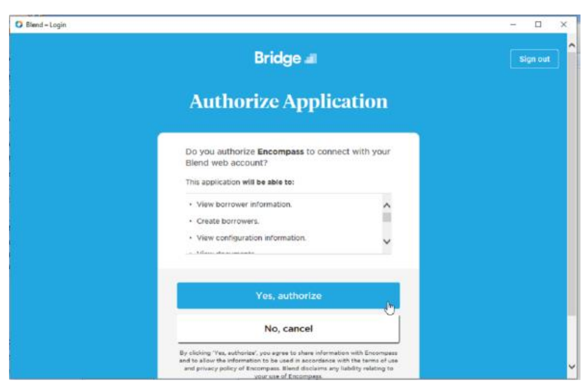


3. **Next click the Services tab -** Order Additional Services. Please note if you do not see Blend in your Providers list you will need to add them. Simply click the All Providers Tab, locate Blend and highlight it and click Add to My List. Next click Submit.





4. **The first time you log into Blend you will have to do a 2–Step Authentication-** You will need to be sent a code via text, email, or an approval from the authenticator app to move forward.



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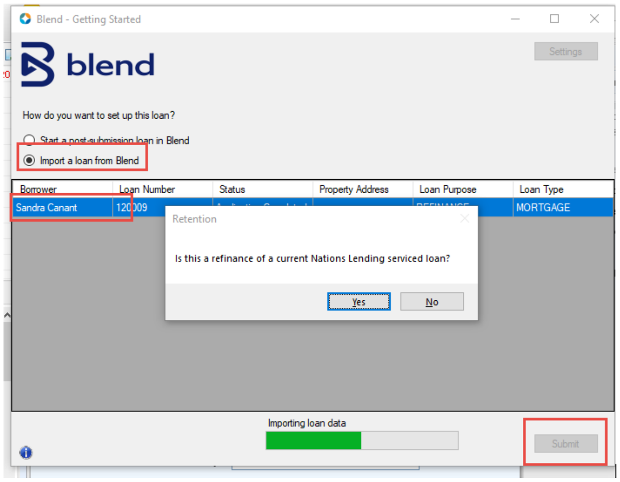
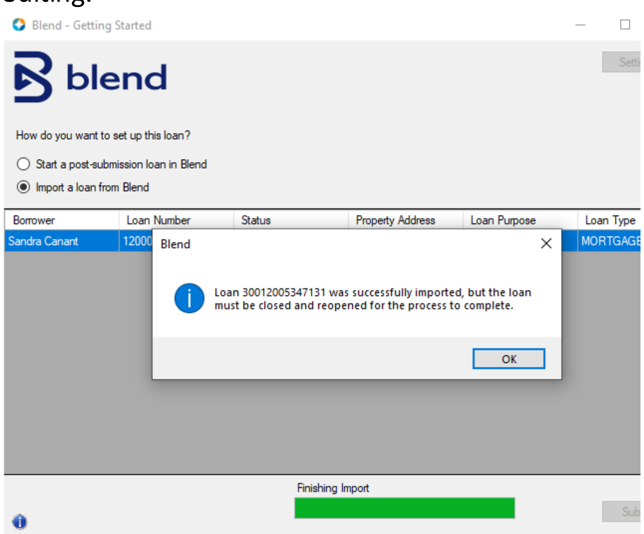
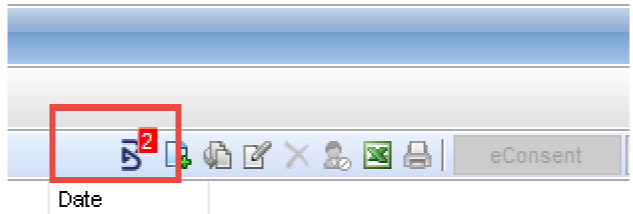
5. **Next select your borrower's loan file then click Submit-** Make sure your have Import a loan file from Blend marked with your radio button. You will get a pop up asking if you are refining a loan from Loan Care.



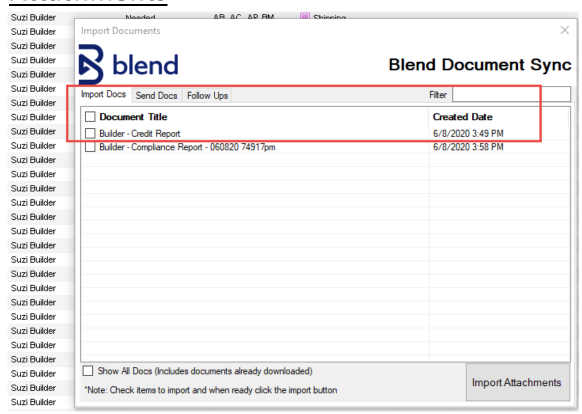
6. **Loan Successfully Exported –** Once you successfully export you will need to get out of the loan file and get back in before editing.



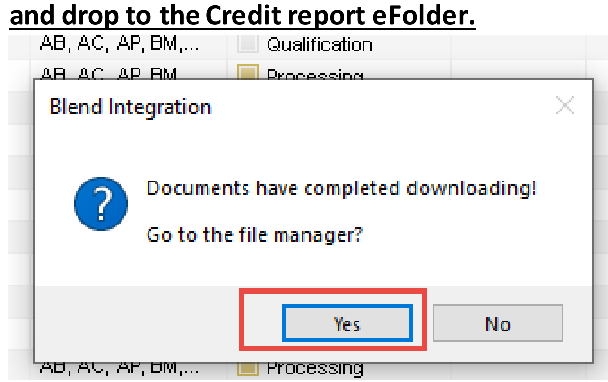
7. **After you log back into the file, go to the eFolder and import the credit report by clicking the Blend icon.**



8. **Check the Credit Report then click Import Attachments**



9. **Click Yes to go to the File Manager and drag and drop to the Credit report eFolder.**



For questions please contact the Encompass Team at encompass@nationslending.com.

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