

# Quick Reference Guide

## Encompass Partner Connect (EPC) and IncomeXpert



# Encompass Partner Connect **STEP 1 (No Uploads)**

- Open services tab in Encompass
- Choose order additional services tab
- Choose Blueprint IncomeXpert - Click submit button
- IncomeXpert & Encompass will create a new income loan calculator
- Confirm what business type (if applicable) in the middle section
- **Close the services tab**

# Encompass Partner Connect **STEP 2**

- **Open IncomeXpert online and find the same loan**
- Use the open Encompass Instance to see the e-folder to review documents
- Analyze income in the “web” version IncomeXpert
- When review is complete **close the loan in Encompass**
- Click the “arrow” next to create PDF to sync all income back to Encompass
- After sync is complete, you can open the loan in Encompass and continue working

# NOTE on “First Time” Log In to IncomeXpert Online

- <https://income.getblueprint.io/Account/Login.aspx>
- **Bookmark that link for future use**
- On left of the login page choose the “Forgot your password”
- Enter your work email address
- You will get a reset email within 30 seconds
- The email will have your login ID and allow you to set your own password

This step **MUST be done** after you have used the services tab for the first time  
If you try to log in before using the Encompass integration it will not know your ID

# Encompass Partner Connect STEP 1 With Uploads

- Open services tab in Encompass
- Choose order additional services tab
- Choose Blueprint IncomeXpert - Click submit button
- IncomeXpert & Encompass will create a new income loan calculator
- Click the upload cloud button from the borrower tab
- Click the upload more documents button
- Agree to the terms and conditions on this page
- Click the select for tax returns,w2,and voe (if applicable)
- Select the documents you wish to upload and click “upload”
- When all document are selected complete click DONE in the lower right hand corner to close
- **Repeat this step** for the Paystubs & Award Letters upload (if applicable)
- Click the upload button on the IncomeXpert ORDER page to begin our review process
- Return to main borrower page by clicking “Back to Doc Manifest” then “Back to Loan”
- Close out services tab and follow “step 2” process for data review

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# Encompass Partner Connect **STEP 2 With Uploads**

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# Blueprint Customer Support Contacts

- [info@getblueprint.io](mailto:info@getblueprint.io) is our contact email and best way to reach our team

- **Customer support hours**

All Times Eastern Standard Time

**Mon - Fri**

8 A.M. to 6 P.M

**Sat & Sun**

Closed

**Federal Holidays**

Closed