Quick Reference Guide

Encompass Partner Connect (EPC) and IncomeXpert

Using Two Instances of Encompass

BLUEPRINT

Encompass Partner Connect Workflow

- Open services tab in Encompass and choose order additional services tab
- Choose Blueprint IncomeXpert - Click submit button
- IncomeXpert & Encompass will create a new income loan calculator
- **This first instance** will be where you enter the data and sync the loan
- **Open a 2nd instance of Encompass (Web or Desktop Version)**
- Open the same loan on your 2nd instance to gain access to the E-folder
- Analyze income using the 1st instance for data entry and 2nd instance for document viewer
- When complete with IncomeXpert go to REPORT tab in the **1st instance**
- Click the “arrow” next to create PDF to sync all income back to Encompass when complete

- Close loan (and encompass if necessary) on 2nd instance

BLUEPRINT

Encompass Partner Connect Process Uploads

- Open services tab in Encompass
- Choose order additional services tab
- Choose Blueprint IncomeXpert - Click submit button
- This will create a new income loan calculator or access existing calculator for this loan
- Click the **upload cloud button** from the borrower tab
- Click the **upload more documents** button on the top of the screen
- 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 that step is 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”

BLUEPRINT

Blueprint Customer Support Contacts

- info@getblueprint.io best way to reach our team
- **Live customer support hours**
  All Times Eastern Standard Time

  Mon - Fri
  8 A.M. to 6 P.M

  Sat & Sun
  Closed

  Federal Holidays
  Closed

BLUEPRINT