



Button Finance will use Loan Connect as a portal to communicate with business partners such as Mortgage Brokers, Title Companies, Investors, etc. Here you will find all communications such as Initial Disclosures, Prelim Closing Disclosures, and Closing Docs for review/download, and requests for any additional documentation or conditions from the Loan Approval. Each party will have the ability to upload any documentation that has been requested by Button.

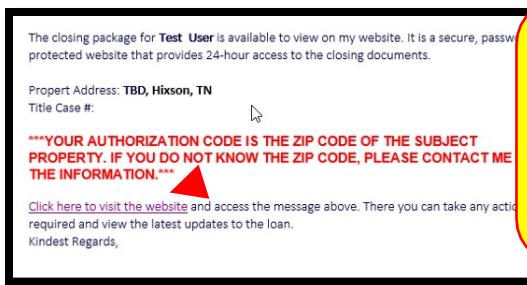
**NOTE:** This will be the only way to pass documentation back and forth between Button Finance and each interested party who is assisting in originating our borrower's loan. Direct emailed documentation to Button Finance is prohibited and will be deleted immediately upon receipt without review.

Features available in Loan Connect include:

- View To-Do lists (pending and completed)
- Upload & view uploaded documents
- View notifications

#### **How Business Partners Access Loan Connect:**

The Encompass user sends a notification email to the email address specified for the business partner. The email contains a unique link to the loan file in Loan Connect. The link directs the business partner to a singleloan file in Loan Connect. If a business partner is working with multiple loans, he or she will access each loan file from its corresponding unique link.



The closing package for **Test User** is available to view on my website. It is a secure, password-protected website that provides 24-hour access to the closing documents.

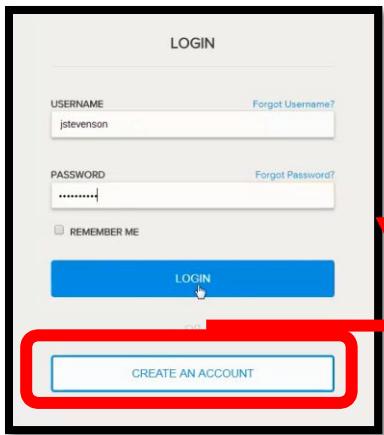
Property Address: TBD, Hixson, TN  
Title Case #:

\*\*\*YOUR AUTHORIZATION CODE IS THE ZIP CODE OF THE SUBJECT PROPERTY. IF YOU DO NOT KNOW THE ZIP CODE, PLEASE CONTACT ME FOR THE INFORMATION.\*\*\*

[Click here to visit the website](#) and access the message above. There you can take any action required and view the latest updates to the loan.  
Kindest Regards,

The business partner clicks the link and signs into Loan Connect to complete the loan tasks. Loan Connect opens to the home page displaying the To Do Lists for the business partner.

If the business partner is accessing Loan Connect for the first time, they will need to create an account before signing in.

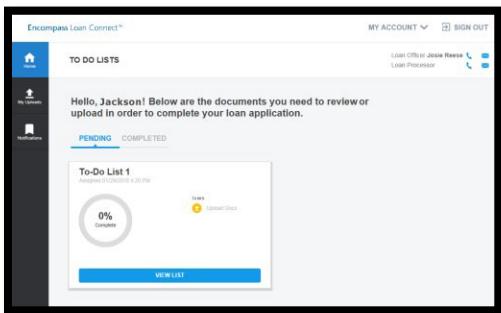


A screenshot of the Encompass Loan Connect login page. It has fields for "USERNAME" (jstevenson) and "PASSWORD" (redacted), a "REMEMBER ME" checkbox, and two "Forgot" links. Below these are "LOGIN" and "CREATE AN ACCOUNT" buttons. The "CREATE AN ACCOUNT" button is highlighted with a red box and a red arrow points to it from the text below.

\*\*\* First Time users select “Create An Account”. You will be prompted to create your username, password and receive an email with a link to validate your new account. The link is good for 1 hour only. You will only need to create your account once per Company and not per Borrower.

\*\*\* If you are having issues accessing the site, please try a different web browser. The site works best with Chrome.

Loan Connect opens to the home page displaying the *To Do Lists* for the business partner.



### Password Management - Forgot Password

Business partners can easily reset a forgotten password using the one-time passcode (OTP) authentication process available in Loan Connect. When a user clicks the **Forgot Password** link on the Account Log In page, the user provides their username and email address, then selects the mode of communication through which to receive the passcode. Modes of

communication a user can choose from include:

- A text messages
- A phone call
- An email



The diagram illustrates a three-step process for password reset:

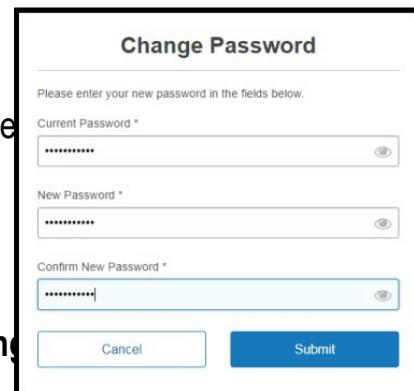
- Get Your Code:** A user chooses how to receive an authentication code (Text, Call, or Email). The "Text" option is selected.
- Enter Your Code:** The user enters the received passcode (330178) and clicks "Submit".
- Reset Your Password:** The user enters a new password and its confirmation, then clicks "Submit".

The passcode is sent immediately to the user and is valid for 15 minutes. After authenticating successfully, the user creates a new password for their account and logs in. **If a business partner enters their username or email address incorrectly 5 times, they will be prompted to create a new passcode.**

### **Password Management – Change Account Password**

Business partners can change their account password from the **Change Password** screen available from the **Account** menu.

1. The user logs into Encompass Loan Connect.
2. The user clicks the **Account** menu and selects **Change Password**. The screen appears
3. The user provides their current password and new password in the fields - click **Submit** - the password is updated and the user logs into their account using the new password.



**Change Password**

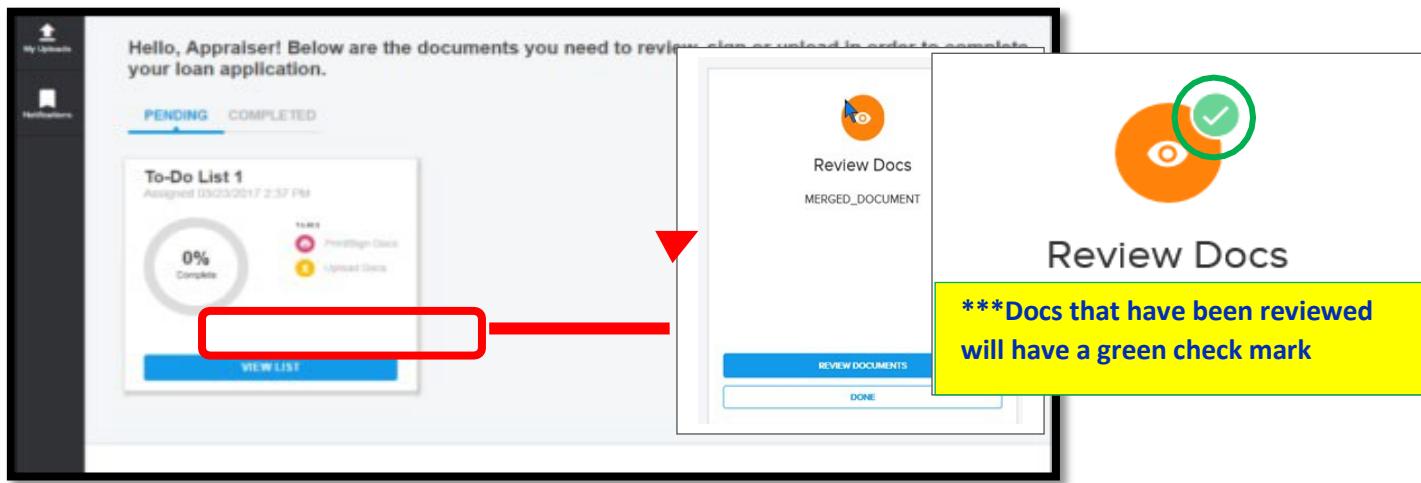
Please enter your new password in the fields below.

Current Password *	<input type="password"/>
New Password *	<input type="password"/>
Confirm New Password *	<input type="password"/>

**Cancel** **Submit**

### **View & Upload Documents with Loan Connect**

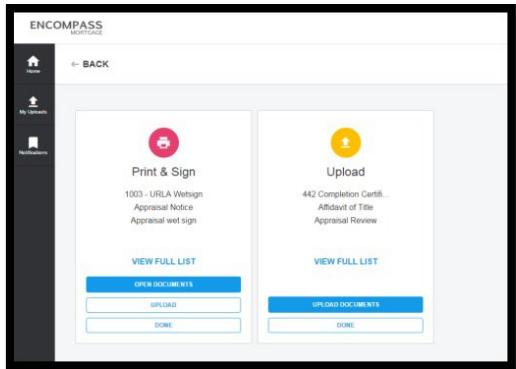
1. Business partner logs into Loan Connect.
2. If the Authorization Code has not already been entered, the business partner enters the AuthorizationCode to gain access to the loan documents.
3. The Authorization Code is created by the Encompass user who sent the electronic document request from the eFolder. The Encompass user must contact the business partner to provide the Authorization Code. **If authentication fails 5 times, the business partner will be locked out. Please contact the Sender after 3 failed attempts.**
4. Partner tasks are shown in the To Do Lists.



5. The business partner clicks **Upload** to upload wet-signed documents or **Upload Documents** to upload other required documents.



Encompass Loan Connect for  
Business Partners



6. Business partner selects the file(s) to upload and clicks **Upload**. After the files are uploaded to LoanConnect, the business partner can click **My Uploads** to view all uploaded documents for the loan file.

*\*\*\*The following file extensions are supported for Browse and Attach the following formats:  
pdf, .doc, .docx, .txt, .tif, .jpg, .jpeg, .emf and .xps formats*



*\*\*\*If you are having issues accessing the site, please try a different web browser.*

The site works best with Chrome.



*Encompass Loan Connect for  
Business Partners*

Please bookmark and whitelist [www.encompassloanconnect.com](http://www.encompassloanconnect.com) for future reference. All communication will be emailed from the lender with a secure link to the portal.

All requested information should be returned by uploading the documents into the portal and *should not be sent back via regular email.*