
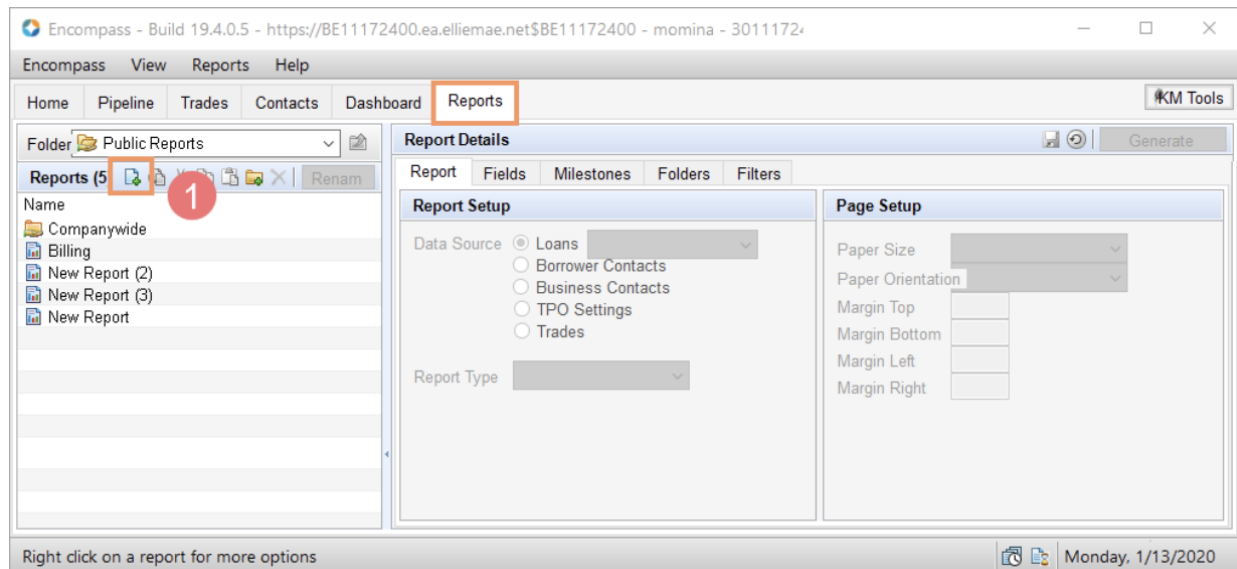




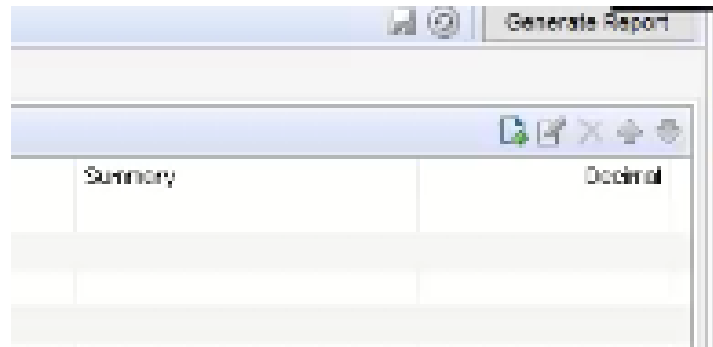
Encompass Export

1. Open Encompass
2. In Encompass, click the **Report** tab in the secondary navigation row next to "Dashboard".
3. Click on the **Public Reports** folder drop down on left side and change it to **Personal Reports**
4. Click the  icon next to the word **Reports**

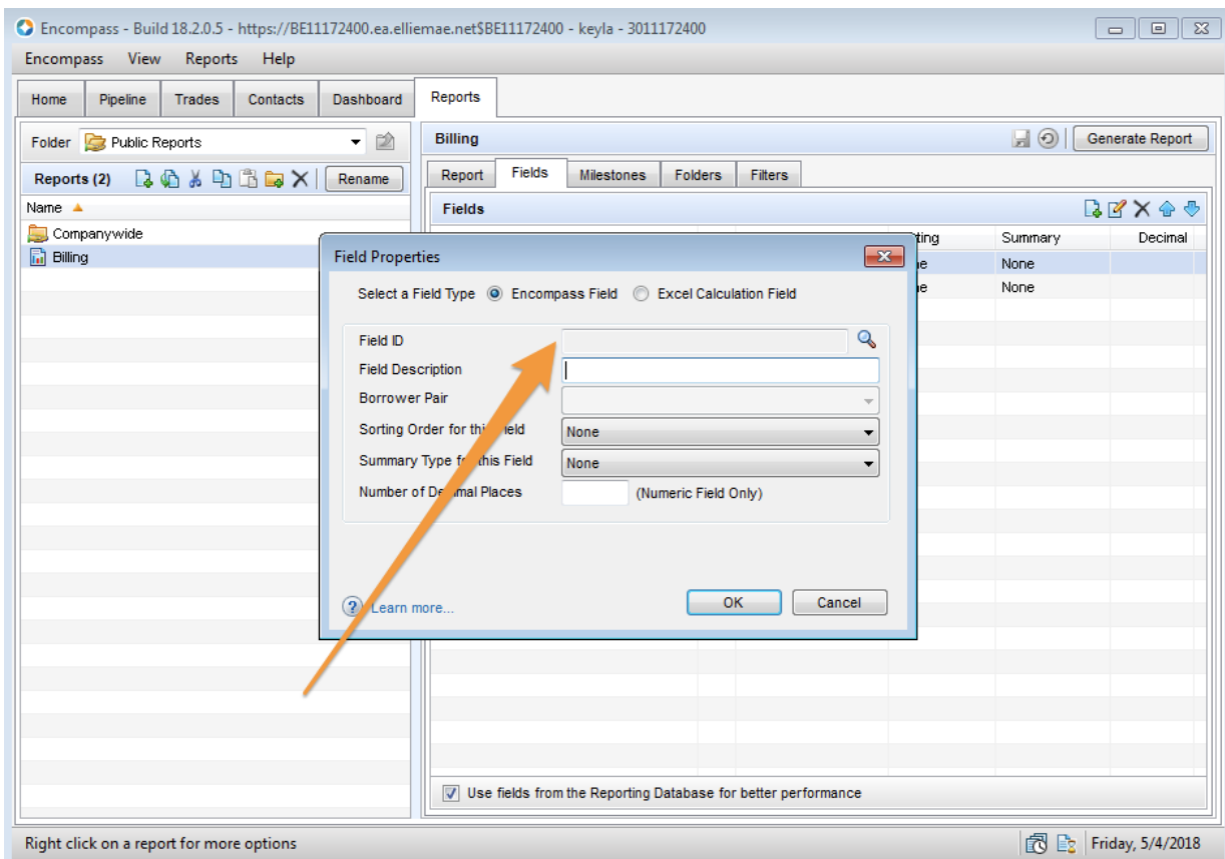


5. Select **Fields** tab in between "Report" and "Milestone" tabs under **Report Details**.

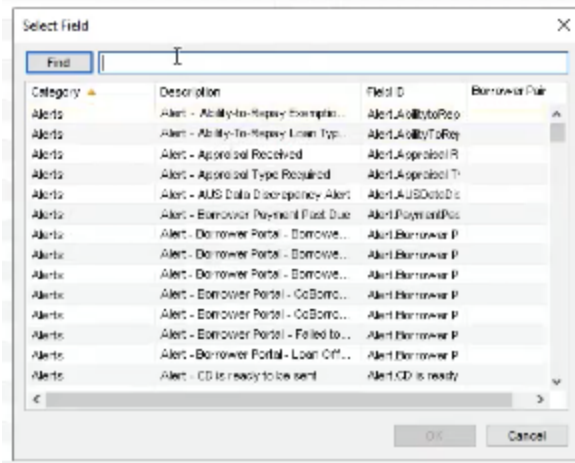
6. On the right side **below Generate Report** button click the  icon



6. Then in the new window that should automatically pop up titled "Field Properties", click the magnifying glass icon next to **Field ID**.



6. Type required Field ID # (See table in Step 7). (repeat this step until all fields have been added).



Required Fields:

Field ID	Field Names	Field Type
36	Borrower First/Middle Name	String
37	Borrower Last Name/Suffix	String
1240	Borr Email	String
68	Co-Borrower First/Middle Name	String
69	Co-Borrower Last Name/Suffix	String
1268	Co-Borr Email	String
11	Subject Property Street or Subject Property Address	String
15	Subject Property Zip	ZipCode
2 or 1109	Total Loan Amount	Integer
3	Interest Rate or Note Rate	Float (3 decimals)
4	Term (Mos) or Loan Term	Integer
5	Total Monthly Payment	Integer

19	Loan Purpose	String
232	Expenses Proposed Mtg Ins	Integer
748 or 763	Closing Date or Est Closing Date	Date (MM/YYYY)
NMLS.X1	NMLS Loan Type	String
3238	NMLS Loan Originator ID	Integer
3244	Lender NMLS ID	Integer

Not required, but recommended fields:

1490 or 66	Borr Cell Phone or Borr Home Phone	Integer (nnn-xxx-xxxx xxxx)
1402	Borr DOB	Date (MM/DD/YYYY)
98 or 1480	Co-Borr Home Phone or Co-Borr Cell Phone	Integer (nnn-xxx-xxxx xxxx)
1403	Co-Borr DOB	Date (MM/DD/YYYY)
356	Subject Property Appraised Value	Integer
25	Subject Property Purchase Price	Integer
CX.LS.APPRAISALRECIIVED	Appraisal Received	Date (MM/DD/YYYY)
364	Loan Number	Integer

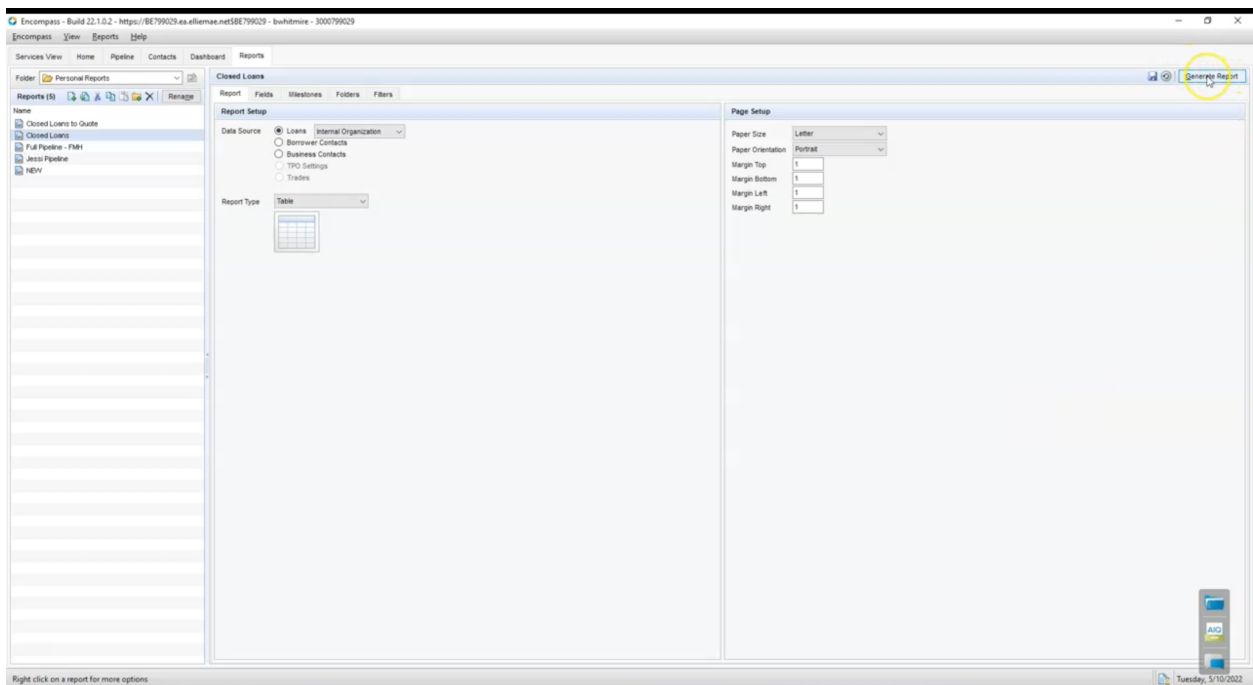
6. Once you have all of the fields in one report, click the **Milestones** tab,
 - a. Select "Define the loans to exclude in the report by milestone criteria".

- b. under the left section “Include loans that are currently at these milestones” check **Funding** and **Funding Verified**.
- c. under the right section “Include loans that have finished a specific milestone” next to **Time Frame**, drop down and select **Custom Dates**, then select either dates for all of your past loans or just a month at a time.

7. Before you generate the report, you will want to make sure to save the report so it is all set up and you can easily pull it in the future. Click the



save icon on the right next to **Generate Report**.



8. Then go ahead and **Generate Report!** It should automatically generate as an excel spreadsheet.

9. Anytime you want to pull that same report, go ahead and navigate back to the **Report tab** in the secondary navigation row. Then click on the saved report in the **Reports** box on the left hand side. You can change the dates in the **Milestone** tab and generate the report again.