

Setting up the API connection

To establish the connection between LoanBeam and Encompass, you must first establish the API (Application programming interface) connection. (Note: This is a one-time event)

Important Note!

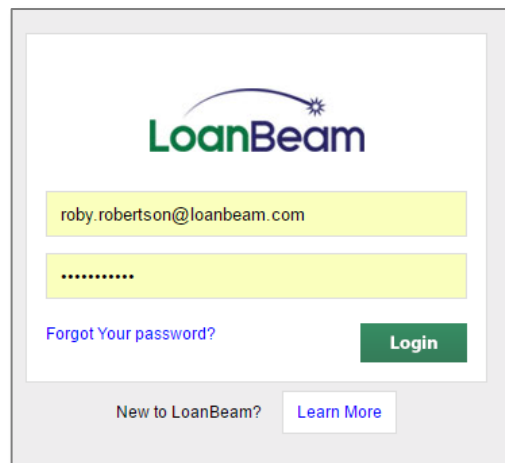
Before you begin the steps outlined below, make sure you meet the following parameters:

- You are an Administrator User to Encompass AND LoanBeam.
- You have successfully logged into LoanBeam.
- You have used the SAME email address for Encompass AND LoanBeam. Examples:

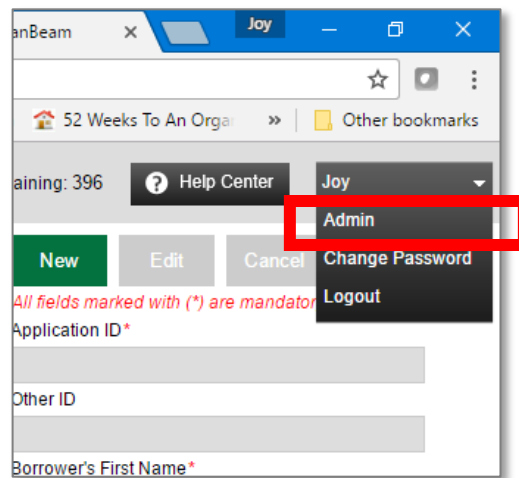
LoanBeam	Encompass	Status
Johnny.somebody@loanbeam	Johnny.somebody@loanbeam	Acceptable
Johnny.somebody@loanbeam	jsomebody@loanbeam.com	Not Acceptable
Johnny.somebody@loanbeam	Johnny.somebody@lb.com	Not Acceptable

To make the connection, follow these steps:

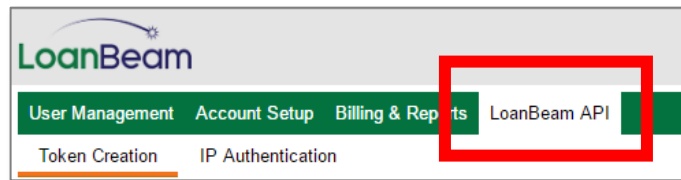
- 1) Log into your LoanBeam dashboard.
(secure.loanbeam.com)



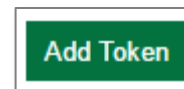
2) Using the dark-gray drop-down box containing your name at the top right of the LoanBeam dashboard, click "Admin."



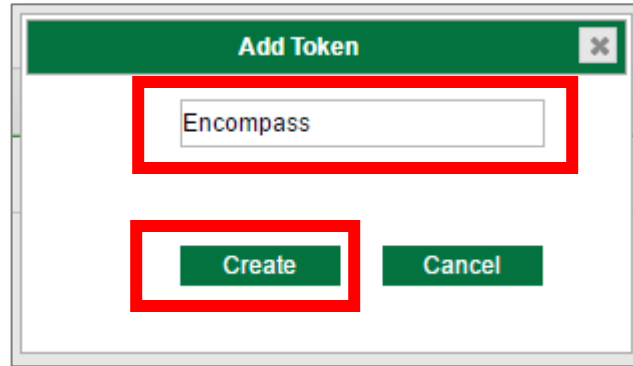
3) Click "LoanBeam API" from the top menu.



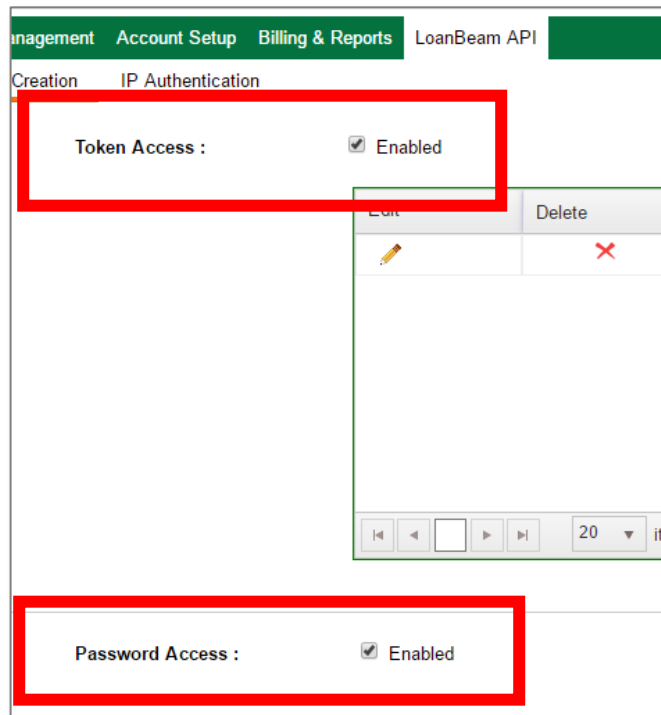
4) Click "Add token."



5) Create a name for the token, for example, "Encompass." Then, click "Create."



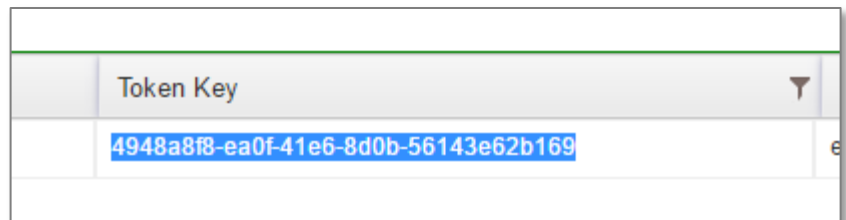
6) Check the "Enabled" box for "Token Access" and "Password Access."



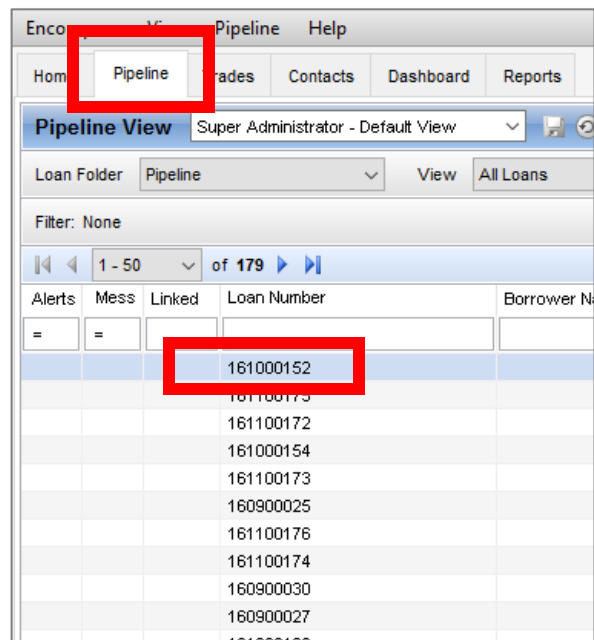
7) Click "Save."



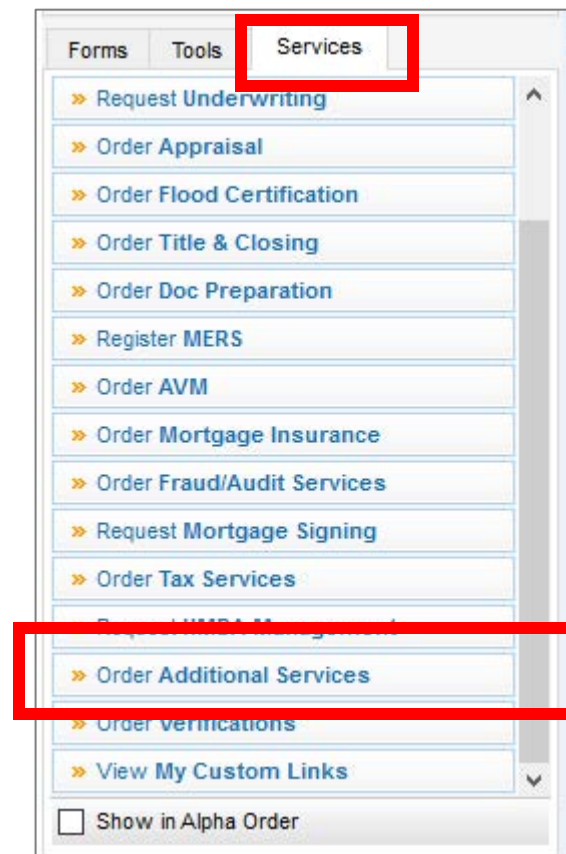
8) Copy the API key by clicking-and-dragging your mouse across the number and pressing "CTRL+C" on your keypad.



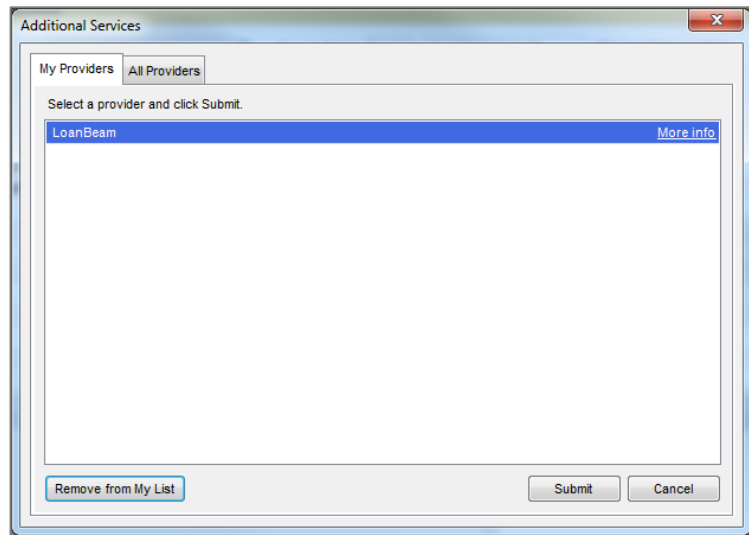
9) In Encompass, select a loan from your pipeline (any will work, you are not editing it).



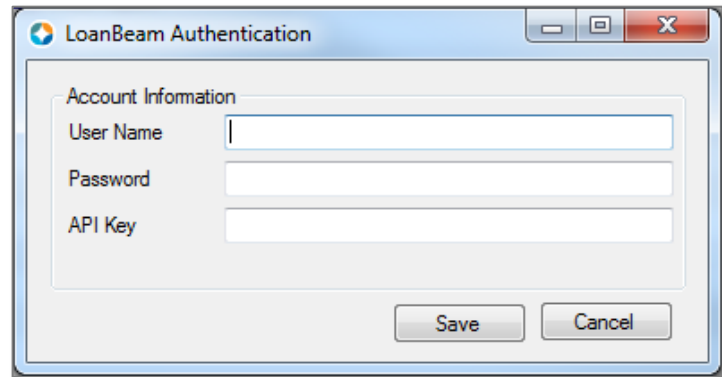
10) From the "Services" tab, select "Order Additional Services."



11) Add LoanBeam to your "My Providers" list and Double-click "LoanBeam."



12) Enter your LoanBeam User Name, Password. Then, paste the API key from your clipboard by pressing "CTRL+V" on your keypad.



If you experience any issues, visit the ["Encompass Training" Help Desk page](#) for troubleshooting; or contact Support@loanBeam.com