



Alert Counter

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Challenge

While alerts can be accessed from the Pipeline view in Encompass, companies may sometimes wish to have more visibility as to how many alerts are active on loans, and which alerts are active on them. Attempting to build a report on the alerts that are in a loan can be difficult and will often lack the level of detail that management or admins may want to see.

Solution

The Alert Counter plugin in Lender Toolkit's Toolshed is a simple, yet effective, tool that will keep count of the alerts on a loan, and copy the details of the alerts to a custom field for easy reporting.

Value

The insights that are available by having the alerts copying into a custom field can be invaluable to management and administrators in determining which common pitfalls and data entry may be holding up loans for closing, enabling them to make actionable decisions and enhancements to the Encompass system.