Lender Toolkit

POWERTOOLS LenderToolkit



Disable Services

Challenge

Many Mortgage Lenders that use Encompass spend a large amount of time refining access permissions so that their environment gives access to users only when needed. There are many built-in features of Encompass to do this, however it can be difficult to restrict access to Services. Where restrictions are available, they might be more rigid than a Lender would need to make their workflows seamless.

Solution

The Disable Services plugin in Lender Toolkit's Toolshed is a powerful tool that locks down services based on advanced and specific criteria. This ensures that users of Encompass can only order services precisely when they need to, and can also prevent orders after reaching milestones or specified data entry.

Value

By being able to disable services in a precise way, lenders can mitigate the risk of unnecessary orders and money spent on loans that are not moving forward. It can also help ensure data accuracy and loan activities are being performed by qualified and trained employees at the exact moment that they should in the loan process.