



Loan Folder Move

POWERTOOLS FREE

Challenge

Encompass comes with a very useful feature of being able to organize loans into Loan Folders, however it can be time consuming to either manually move loans from folder to folder, or to build business rules to move loans (which sometimes might not trigger correctly). While it's a great organizational feature of Encompass, the last thing an Admin or Operational Manager wants to do is micro-manage pipelines and which loans are going into which folders when they need to be moved.

Solution

The Loan Folder Move tool in Lender Toolkit's Toolshed suite is designed to automatically move loans into the correct folder based on dynamic field triggers or with the build in configurations available through its settings. It allows for any number of scenarios to move loans based on loan data and checks to see if a loan should be moved each time the loan is saved.

Value

By automating the way that loans in Encompass are moved from folder to folder, users can have more concise pipelines and can keep their eyes on loans that are relevant to them and the activities that are needed that day. It can improve end user satisfaction and prevent confusion during the loan's workflow by keeping Encompass's loans organized and separated by whatever criteria your business needs demand.