



DETAILS INCLUDE

Encompass 360 is the strongest and most diversified loan origination system on the market today. At Matchbox our core focus is mortgage banking operations and the use of technology to improve your workflow and overall mortgage process. Our experience has seen many Encompass clients take their flawed process (formed from their prior LOS) and just replicate that in Encompass which does not allow for any benefits of the Encompass software. Or in other words, continuing to force a square peg in a round hole.

Our implementation process looks to meet with your staff to fully understand the current business model and how it is supported today. We also look to your future goals and the firm's ability to scale. Once complete, we then begin to form the implementation plan and the development options within Encompass to support and improve your current model for today and for future growth. Throughout development, we work with your staff in reviewing the development and modifying based on best practices and your feedback. We then work with your Encompass administrator on a full knowledge transfer to ensure that you are set for future success.



Ensure you are taking advantage of all the benefits it has to offer

- Role Specific Set-up to Ease Use of Encompass Per Role
- Required Field Rule Creation for Accurate Disclosure Issuance
- Milestone Completion Rules Tied to Role Ensuring Data Capture at Proper Level
- Role/Milestone Required Field Customization to Ensure Accurate Data Capture
- Intuitive Business Rule Programming that Intuitively Reacts to Loan Detail Selection
- Custom Milestone & Loan Folder Configuration
- Loan Program & Loan Template Creation
- Closing Cost Template & Conditions & Document Set Creation
- Custom Borrower Summary
- Custom Branded Commitment Letter & Conditional Approval Letter
- Underwriting Change Comparison Custom Form
- Edisclosure Rule, Change of Circumstance Business Rule Creation
- Funding Worksheet Set-up
- Product and Pricing Engine Interface Set-up
- Efolder Customization
- Investor Stacking Order Creation
- Secondary Pricing Comparison Custom Form
- NMLS Reporting Set-up

ENCOMPASS 360 IMPLEMENTATION

Igniting ideas for the mortgage industry.

matchbox
wstfcpx



Encompass
by EllieMae®

100 Crossways Park West, Suite 216
Woodbury, NY 11797

1-866-77-MATCH | info@matchboxllc.com
www.matchboxllc.com