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REASONS LENDERS NEED ECM



Need to increase efficiencies, create audit trails and fund better quality loans?

If your employees are spending too much time comparing data during quality control or searching for critical documentation, then it's time to integrate your LOS with an enterprise content management (ECM) solution.



HOW ECM INTEGRATES WITH — AND EMPOWERS — YOUR LOS

01 ACCESS

Provides your employees with integrated document retrieval directly from within your servicing platform. Users stay in the LOS and quickly find whatever they need.



02 PRINT DIRECTLY INTO ECM

Easily prints web pages, screen shots, PDFs, etc. directly into your ECM solution.



03 EMBEDDED INTEGRATION WITH OUTLOOK®

Speeds processes with the ability to access and upload information directly from almost any email client.

04 CONFIGURABLE WORKFLOW

Enables you to easily configure electronic document workflows without relying on your IT department for help.



05 DYNAMIC ORGANIZATION

Automatically organizes documents based on users and roles.



06 DYNAMIC TRACKING

Tracks refinancing, purchase and construction documents, automatically notifying key stakeholders when documentation is incomplete or missing.



07 VERSIONING

Empowers you with rules to quickly identify issues.

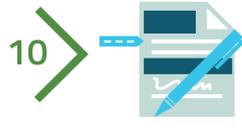
08 PRE-DEFINED SECURITY MODELS

Delivers robust security at document and/or data levels.



09 DOCUMENT-LEVEL AUDIT TRAILS

Keeps users informed by letting them know everything about the chain of custody — who did what, when and why.



10 ANNOTATIONS AND REDACTIONS

Lets you make quick explanatory notes or redact sensitive information, so users only see what they need.

11 AUTOMATIC DOCUMENT RETENTION

Empowers you to easily set up long-term retention and disposition requirements to manage your document retention for you—helping you proactively manage evolving regulations.



12 INTELLIGENT FILE SPLITTING

Goes beyond simple barcode parsing to work with BLOBs and PDFs for reporting and dashboards with real-time information.



13 SCREEN & CONTEXT-SPECIFIC RETRIEVALS

Saves time by allowing users to quickly find supplementary documents and information. For example, viewing income documents while on the income screen.



14 ROBUST APIS

Enables borrower, member and vendor access to specific documents streamed as a single PDF.



15 BUSINESS RULES

Allows you to make “on-the-fly” changes to workflow, giving you process agility, greater business control and transparency.