



Docs/File Counter

POWERTOOLS FREE

Challenge

There are many situations in which companies may want to be able to report on documents or provide a Pipeline column showing a document count in Encompass. Unfortunately, unlike most fields in Encompass, the ability to report on a count of document placeholders or actual documents in each loan does not come built into Encompass.

Solution

The Docs/File Counter plugin in Lender Toolkit's Toolshed is an easy to use tool that simply counts the number of documents, attachments, and empty placeholders there are in your eFolder each time a loan is saved. This makes it very easy to add these fields to the reporting database for reporting or pipeline views, or you can use these fields for other kinds of alerts and business logic. It also provides in a custom field the number of milliseconds that the tool took to make the count, which allows for admins to view the impact this plugin might have on loans depending on their size.

Value

The Docs/File Counter plugin can help companies that feel like they have too messy of an eFolder, or would like to simply see more information about their loans at a glance. By having access to this data, companies can find many new and innovative ways to modify their workflows and become more efficient and organized.