



Ready for Shipping

POWERTOOLS OPTIMIZED

Challenge

Mortgage Lenders are held to a very high standard by regulators and ethical standards to maintain data integrity and security. When it comes to protecting documents in Encompass, there are built in configurations that can be set up to prevent users from making changes after a certain point. However, there are few ways to automatically protect documents as the loan progresses.

Solution

The Ready for Shipping Encompass plugin in Lender Toolkit's Toolshed is able to configure documents to automatically protect themselves based on various criteria. They can be locked down based on if they are disclosures, have a specific document name, or after the document has been manually moved to the Ready to Ship status.

Value

Encompass Administrators are tasked with constantly improving data integrity and security in Encompass. Sometimes this can mean hours upon hours of configuring complicated business rules and modifying persona access. But with the Ready for Shipping plugin, and with very little setup, your Encompass Documents can be more secure and company risk can be reduced effectively.