



Loan Folder Move

Loan Folder Move simplifies loan organization within Encompass® by eliminating the need for manual folder updates or unreliable business rules. This powerful automation tool dynamically moves loans to the correct folder based on configurable field triggers, keeping your pipeline clean, your teams focused, and your workflows efficient.



KEY FEATURES:



Automatic Loan Assignment

Automatically move loans to the correct folder based on field triggers—no more relying on users to move loans to the correct folder.



Customized Workflow

Built-in configurations let you define exactly how and when loans should be moved based on your workflow.



Cleaner Pipelines

Automatically organize loans in Encompass based on your business logic, so users stay focused on what matters most. No more micromanaging, just a simplified, productive mortgage loan process.

AVAILABLE IN API & SDK VERSIONS

API-based (New): A modern, flexible version available as a separate product in the PowerTools™ suite

SDK-based: Still available for customers who prefer or rely on the original configuration

Schedule a Consultation
to learn more
lendertoolkit.com