

Encompass Connector

The Encompass Connector by EMS provides a mobile real-time unified platform providing complete visibility to the lead to loan pipeline. The connector allows financial institutions to build a lead to pre-qualification process, automate loan initiation workflows, view loan milestones and trigger tasks/emails for action needed, view documents/notes, and more.

Challenges the Connector Solves

The Encompass Connector allows the bank or credit union to begin and end their workday in Salesforce with a real-time bi-directional connection between the LOS and Salesforce.

- ▶ Real-time updates throughout the loan process for the most critical fields like loan milestones, loan amounts, pre-qualification fields, processing / underwriting fields, and 130 additional loan data fields.
- ▶ Loan can be initiated from Salesforce, so your organization doesn't have to worry about data inaccuracies or re-keying the same information.
- ▶ Ability to view loan updates and milestones, work critical tasks/actions, and view loan documents and notes in Salesforce, so the Sales and Loan Officer teams do not have to work in two systems.
- ▶ Automated process workflows in Salesforce streamline processes and significantly reduce manual input.
- ▶ Provides the organization insight into lead sources and conversion bringing insight into what referrals and marketing efforts are driving the most profit.
- ▶ Advanced reporting and dashboards from lead to loan pipeline to funded, and other KPIs and activities.
- ▶ Compliance is covered through extensive audit logs for any modifications and uploads occurring in Salesforce.



1 Lead/Pre-qualification Survey

2 Queue

- Qualifies → 3 → Fields Pass to Encompass
- Does Not Apply

4 Customer receives email to complete application

5

- Application Completed → 6 → Data syncs between Salesforce & Encompass in real-time
- Application needs more information → 7 → Employees can view missing Documents & automate emails

8 Customer receives email/text notification about missing documents

9 Ability to have personalized manager and employee reports and dashboards