

FUSION MORTGAGEBOTLOS

Work Flow and Collaboration — Move Loans through the Pipeline with Greater Efficiency and Ease



Streamline your lending processes, while enhancing efficiency to help you save time, money and valuable staffing resources.”

Tap the potential to help loan openers, processors, underwriters, closers and funders organize, track and streamline all processing steps.

WorkQueues, an additional feature of the Fusion MortgagebotLOS solution from Finastra, automatically performs workload balancing based on the available capacity of each user's queue. Work Queues also provides configuration options for expected turn times of individual tasks.

Because loan openers are assigned to tasks—not loans—this functionality allows them to concentrate on ordering necessary documents to expedite the loan file. Processors are able to see what tasks need to be completed, those that are on hold and those requiring follow-up. Underwriters can separate new loans (full file and appraisal only) from conditions, and when conditions are submitted back to Underwriting, the loan appears in the original Underwriter's queue.

Closers can prioritize requests for preliminary instructions and closing packages using the closing calendar. Both types of requests can be put on hold to clearly identify those loans that are ready to be worked on.

Funders can manage the amount of funds they need to reserve daily. Tasks can be put on hold in the event something comes up during closing that needs further review.

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- WorkQueues dashboard breaks down tasks systematically and can be turned on/off depending on user's rights.
- Navigate between the pipeline and WorkQueues with a single click.
- User group specific queue views help boost productivity enterprise-wide. (Customized is the wrong word to use since clients can't really customize)

About Finastra

Finastra unlocks the potential of people and businesses in finance, creating a platform for open innovation. Formed in 2017 by the combination of Misys and D+H, we provide the broadest portfolio of financial services software in the world today –spanning retail banking, transaction banking, lending, and treasury and capital markets. Our solutions enable customers to deploy mission critical technology on premises or in the cloud. Our scale and geographical reach means that we can serve customers effectively, regardless of their size or geographic location – from global financial institutions, to community banks and credit unions. Through our open, secure and reliable solutions, customers are empowered to accelerate growth, optimize cost, mitigate risk and continually evolve to meet the changing needs of their customers. 48 of the world's top 50 banks use Finastra technology. Please visit finastra.com

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