



LOS Checklist

Here's a checklist of things to look for in your next Loan Origination System:

- 1. Comprehensive, end-to-end single vendor solution
- 2. 100% web deployed; no Terminal Server and/or Citrix required
- 3. Multi-business channel system, single input designed with single database
- 4. Internal A.U. engine for creating and managing all products, pricing, guidelines for any investor
- 5. Contact management built in—with integration to Microsoft Outlook
- 6. Call center management
- 7. Marketing campaigns and tracking
- 8. Telemarketing scripting - inbound/outbound
- 9. Lending Tree lead interface and automatic importing of leads from 3rd parties
- 10. Built-in loan level document imaging; no third party fees
- 11. Lead management
- 12. View/print reports from users work queue
- 13. Secondary marketing & warehouse line management
- 14. Interim loan servicing
- 15. 75% configurable by business level system administrator (without custom programming)
- 16. Creation of any kind of custom task, screen and business rules without risk
- 17. Processing through business rule driven tasks
- 18. Support of VMP & GreatDocs and/or DocMagic & on-line documents
- 19. Check printing with check register
- 20. Field level auditing on any field, including full history
- 21. Field level security
- 22. Task, document, and condition tracking with user pop-up notifications
- 23. No additional charge for standard interfaces; interfaces with any 3rd party
- 24. Management and tracking of all 3rd party relationships
- 25. Key personnel have significant mortgage industry experience
- 26. Track record of outstanding support
- 27. Training of your staff on your site
- 28. Real-time web broker portal; no third party fees