

Teraverde® Automated Role Assignment Bot for Encompass®

Automated Role Assignment Bot

- **What it Does:** The Automated Role Assignment Bot assigns the right person to the right loans for loan type, round-robin or other business rules. The Bot performs the assignment automatically and is configurable by the Encompass Administrator.
- **Why It's Important:** The Automated Role Assignment Bot reducing manual effort and ensures the right roles are automatically assigned to each loan.
- **How Does It Increase Productivity?** The Loan Folder Automation Bot puts in place a systemic process to assign all the appropriate personnel to the loan. No need for an associate to remember to assign personnel. Speeds loan completion by ensuring the correct personnel are assigned to the right loan at the right time.

- **Does the Tool Integrate with Other Teraverde Products?** Absolutely. Automated Role Assignment Bot is fully integrated with SpeedPath®, the Lock Desk Data Comparison Bot, the Loan Estimate/Closing Disclosure Data Comparison Bot and all other Teraverde Productivity Solutions.
- **What's Included?** The Automated Role Assignment Bot application licensed code, Installation Guide and Administrator's Guide.

The screenshot shows the Encompass software interface with the Automated Role Assignment Bot configuration. The interface displays loan details for '1 Test Lane' and compares data across four stages: Current Loan Data, Data as Submitted to Processing, Data as Submitted to UW, and Data as Decided by UW. The 'Data as Submitted to UW' section has a yellow circle highlighting the 'Co-Borrower Information' field.

Pricing:

Lenders closing > 2,000 loans per year: \$3,750 single payment
 Lenders closing < 2,000 loans per year: \$2,500 single payment

Annual maintenance after first year is 10% of purchase price, billed annually and covers periodic updates of the product.

