

Stay In-Sync with Industry-leading Connector

Improve Data Accuracy and Compliance. Track and report loan analyses and efficiency of origination.

What does it do?

Velocify is proud to partner with Ellie Mae Encompass to provide a robust integration between our systems called Encompass Connector. The Encompass Connector manages crucial handoffs between systems across the loan lifecycle, reducing errors, duplications, and time switching between solutions. Plus, added features like the ability to leverage field and loan status information with Velocify actions such as automated emails and texts.

How does it work?

Easy! Select the fields you would like connected between Velocify and Encompass and choose how you would like them mapped. Then, once you've logged into Encompass through Velocify, simply export leads to create new loan files. As loan funding proceeds, Encompass edits and status changes can be synced back to Velocify to ensure data integrity and aid in prioritizing communication with borrowers.

With Velocify Encompass Connector you can:

- ▶ Automatically create new Encompass loan files from Velocify leads
- ▶ Create a Velocify lead from an originated loan in Encompass with Encompass Sync
- ▶ Sync important fields and milestones every 15 minutes between systems for up-to-date accuracy
- ▶ Filter created leads in Velocify by milestone, loan number, or loan officer with Encompass Sync
- ▶ Analyze activities and performance statistics with custom reporting
- ▶ Easily manage version mismatch and errors in detail
- ▶ Validate Encompass credentials from within Velocify and be notified of any credential failures
- ▶ Update Encompass software from within Velocify settings

The Velocify Encompass Connector comes standard with 50 mapped fields. Have a complex lead-to-loan sales cycle? Our experts can customize your Velocify/Encompass integration to suit your unique needs.

Already have Velocify and Encompass? Contact your Account Manager to get the Encompass Connector.