

PURCHASE ADVICE AUTOMATION



INTERESTED IN A TRULY AUTOMATED PURCHASE ADVICE PROCESS?

All you have to do is download the PA from the investor site...that's all!



PURCHASE ADVICE AUTOMATION HIGHLIGHTS INCLUDE:

- Programmatically posts PA data without ever even launching encompass or uploading files
- Ingests xls, csv, and PDF purchase advices via OCR technology
- Auto-completes ALL datapoints on the Purchase advice, including 'first/next payment to' dates
- Ability to write to Funding Templates to manage pre-defined fees
- Completes Purchased or other milestones
- Triggers custom business rules and triggers within current environment
- Performs normalization of data; no need to ever open or update a purchase advice
- Ability to post document to eFolder

FOR MORE INFORMATION, OR TO SCHEDULE A DEMO CONTACT:

Frank Fiore - Vice President t: 516.802.7170 c: 516.236.6711