

INTEGRATIONS 101:

Checklist to Navigate Mortgage Technology

Mortgage efficiency means ensuring that all of your software coordinates well and ultimately makes your objectives easier. Take a moment to consider these helpful tips before purchasing new mortgage technology:

ASK ABOUT YOUR OTHER SOFTWARE



Ensure your software company plans to support your specific loan origination system over time. Will your technology solutions update when your LOS does?



Ask how their software is accessed. Is your technology infrastructure compatible with their web portal or system-to-system integration?

REMAIN TRID-COMPLIANT AND SECURE



Evaluate any latent risks when using new software or partnering with a business. The software you onboard must comply with regulations like TILA-RESPA Integrated Disclosure.



Eliminate manual loan processes by using XML files (instead of PDFs or Word docs) to reduce the potential risk of human error and also save time.

SIMPLICITY IS KEY



Consider if you'll need an additional login to accommodate your solution. Remember: the best technology will take away the need for many separate logins.



Research customization options. Create precise order groups and take away reports you don't need. It's a great way to simplify operations.