

PIPELINE MONITORING

**Automate Pipeline Oversight.
Eliminate Manual Checks.
Reduce Risk.**

- Catch pricing and eligibility changes as they happen – never miss a critical update.
- Ensure timely, accurate communication about loan changes.
- Automate pipeline oversight and eliminate tedious manual checks.

Automated Change Detection

Monitor loan profiles for changes (FICO, loan amount, property address) that impact pricing or eligibility.

Work Queue Integration

Dynamically updates as loan details change, so teams always have the latest info.

Eligibility Rule Clarity

Notifications specify which rule triggered the alert (e.g., "FICO below 620").

Automatic Notifications

Alert loan officers via email when a change affects pricing or eligibility.

Platform Integration

Built for Encompass & Empower LOS users – no custom development required.

No Borrower Disruption

All notifications are internal, empowering loan officers to guide borrower conversations.

How It Works

MONITOR

Track loans for profile changes

ALERT

Real-time notifications sent to loan officers and work queues

ACT

Teams respond quickly to pricing and eligibility changes
– no missed updates

- Track loan changes instantly
- Automate workflow for product and pricing updates
- Mitigate risk with proactive alerts

Connect with your
Optimal Blue rep or
Sales@OptimalBlue.com
to learn more.