

PowerSeller®

Post Closing Manager



The Post Closing Manager is PowerSeller's Document Tracking/Work Queue system.

The Post Closing Manager requires that you license the PowerSeller Secondary Manager and Data Manager, and have them reside on the same server, as a prerequisite.

A few of the Post Closing Manager's functionality features include:

- Document Tracking
- Complete Document History
- Automatic Document Selection
- Time Stamps all entries
- Integrated Work Queuing
- Batch Processing
- Trade-Level Task Tracking
- Management Statistics

Document Tracking

The Post Closing Manager tells you where each document is located. It also traces where a document has been, where it was before that, how long it was there and who dealt with it. The system maintains complete history for each document, along with your commentary.

The system handles an unlimited number of documents, status codes and loan products. You can choose between the current status view or the historical view of document information.

You don't have to tell the Post Closing Manager which documents to track, it already knows. The system examines each loan and decides which documents are required, and keeps tabs on each. Even when a loan changes from a conventional to an ARM, the Post Closing Manager sees the change and updates itself accordingly. Of course, there are always exceptions, and the Post Closing Manager handles these deftly with built-in tools that give you complete control.

All Post Closing Manager entries are time and user stamped for complete accountability.

Work Queues

PowerSeller's Post Closing Manager answers the question "What has to be done today?" You can zero-in on the work that matters right now using integrated work queues. At a glance, the Post Closing Manager displays:

- Documents that are past due
- Documents that are about to be past due
- Loans shipping in two days that are also missing documents
- All documents held at one location
- All outstanding documents of a given type
- Loans with error conditions

These are examples of ways you can configure work queues. The Post Closing Manager lets you define any situation and create a work queue for it. You can even assign followup tasks to specific persons.

Batch Processing

For occasions where you send out the same document for several loans, the Post Closing Manager offers Batch Processing. Simply highlight the loans from a selection screen and make a single tracking entry. You're done. When multiple documents arrive from the same place, the procedure is identical.

Task Tracking

Trade-level work tasks are handled by a built-in Task Tracking system. This ties directly to the PowerSeller Secondary Manager's trade management screen for real-time assignment of trade tasks. Tasks can be predefined for easy data entry or added on an as-needed basis.

Management Statistics

Statistical data for management is collected automatically. Reliable numbers can be tabulated for:

- Average turn-around time for each document
- Most efficient shippers
- Below-average service providers
- And more

User-Definability

User screens in the Post Closing Manager are extremely flexible. Loan information screens show you exactly the loan-level detail you require, in the format you require. Work Queue and Event Tracking screens can be crafted to suit your needs. Reporting is completely open-ended.

Using the resources of PowerSeller's 100% open database, you can add additional data items to the system, and utilize them for document tracking, task tracking and work queues.

Reporting

You have more reporting power than any other system. Literally any sort of report that you require can be created and run on demand. Reports can also be scheduled to run on a regular basis, using PowerSeller's internal scheduling system or outboard scheduling software.

All Post Closing Manager reports can be modified by your staff as your business needs change. Even pre-defined Post Closing reports can be used as the starting points for your customized summaries. You never have to start from scratch.

System Requirements

The Post Closing Manager module requires the PowerSeller Secondary Manager and Data Manager modules as prerequisites.

InfoMaker report writer is required for report and screen design.