System Requirements

Current System Integration

Current Systems

01 Odoo (ERP in python)
crm.c-mtg.com
- Lead Management
- Pipeline Management
- Task Management

02 WP
(c-mtg.com website)
- Incoming Traffic
- Stats / Pages / Content
- SEO

03 Secure Loan Docs
1003 application (secure)
- Loan Application
- Initial Disclosures
- Credit Pull

04 Google Drive
- Upload Files / Download Files / Share Files
- Storage of Docs

05 Point (calyx)
Proprietary LOS
- Loan Application / Disclosures
- Fannie Mae Files .fnm 3.2 export import

06 Pricing Engine
Django App - pricing.c-mtg.com
- Decision Engine
- Content
- Internal messaging

07 Property Data
stewartnow.com
- Look up property profile
- Look up property recorded documents

08 Credit report pulling
Partners credit and verification
- Credit supplements
- Verify income
- Credit decisions

09 Esign
hellosign.com
- Hellosign.com - need to upload docs and set up signing.
- Can combine with either WP or Odoo

10 Communication
Callfire.com, ATT, Zoho, Fax.com
- Email - Zoho.com (set up secure messaging)
- Fax - Fax.com (combine with phone)
- Phone - Callfire.com (toll free, local, text) + ATT for Cell phone

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                        │   Custom Pricing    │
                        │       Engine        │
                        │     c-mtg.com       │
                        └──────────┬──────────┘
                        ┌──────────┴──────────┐
                        │     Application     │
                        └──────────┬──────────┘
           ┌───────────────────────┴───────────────────────┐
┌──────────┴──────────┐                         ┌───────────┴───────────┐
│     Export to       │                         │          CRM          │
│  Fannie Mae and PDF │                         │ Django Admin or        │
│                     │                         │ equivalent Dashboard   │
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│Disclosures │ │Email/Fax/Phone │       │     Drive       │  │  Import Property     │
└───┬────────┘ └────────────────┘       │ drive.google.com│  │       Data           │
    │                                   └────────┬────────┘  └──────────┬──────────┘
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- Custom Pricing Engine — c-mtg.com
  - Application
    - Export to Fannie Mae and PDF
      - Disclosures
        - Esign Docs
          - Submit to investor
          - Clear Conditions
        - Document Manager
      - Email / Fax / Phone
    - CRM — Django Admin or equivalent Dashboard
      - Drive — drive.google.com
        - Email / Fax / Phone
          - AI / ML — Learn program conditions and requirements
          - Closing DOCS
        - Store docs
          - Closing
      - Import Property Data
        - Determine Eligibility
          - Security