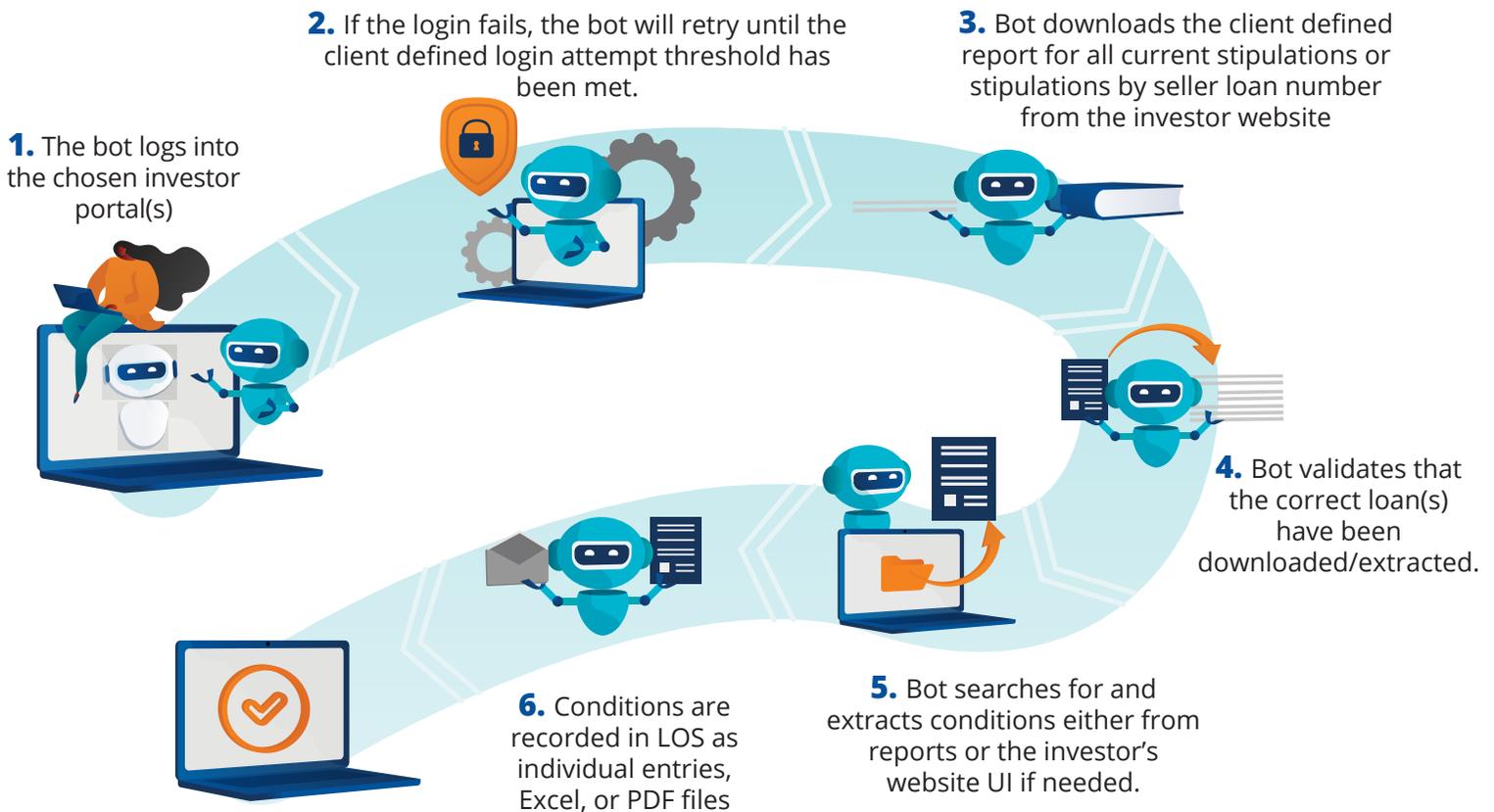# neostella

neostella prebuilt investor stipulations automation

Streamlining your mortgage business with RPA doesn't stop at the end of the application process. Neostella has developed investor stipulation integrations that enable RPA bots navigate to specific websites for open stipulations/pending conditions retrievals and input those into borrower loan files--making automation possible throughout the lifetime of a loan.

how it works

RPA bots can take over the tedious task of managing investor stipulations—monitoring either lender or investor portals for open stipulations--freeing your team to focus on higher ROI activities. The best part? Your bots never stop working.

1. The bot logs into the chosen investor portal(s)

2. If the login fails, the bot will retry until the client defined login attempt threshold has been met.

3. Bot downloads the client defined report for all current stipulations or stipulations by seller loan number from the investor website

4. Bot validates that the correct loan(s) have been downloaded/extracted.

5. Bot searches for and extracts conditions either from reports or the investor's website UI if needed.

6. Conditions are recorded in LOS as individual entries, Excel, or PDF files

current integrations

We've developed Encompass, Calyx and Byte integrations with many leading investors, including:

PennyMac Loan Services, LLC

WELLS FARGO

Freddie Mac We make home possible®

CHASE

AmeriHome mortgage

newrez

mr. cooper CHANGING THE FACE OF HOME LOANS

Flagstar Bank

THE MONEY SOURCE

and many other major lenders!

Logos are property of the respective lenders.

manage your data with data services

Keep your human workforce in the loop with "Data Service" -- the tool that keeps track of the information that has been obtained from every investor, such as loan numbers, conditions, condition date, business exceptions, time of processing, and other KPI's. This information can then be exported into an Excel sheet for easier visualization for the client. Action Center*, is another useful tool that notifies the appropriate individual when robots encounter instances that prevent them from completing an investor stipulation process, including:

Errors connecting to a portal

Password error or resets needed

Errors identifying or validating a loan

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investor stipulations specifications

Extract loan number from pipeline view

Search Investor web portal for loan

Navigates to conditions

Robot Extracts to Excel spreadsheet:
All Conditions Details --> Date of Condition, Condition Type, Condition Status, Comment

Robot returns to Encompass and opens loan file

Robot navigates to custom page on loan file

Robot updates text field with condition details and saves

Robot loops through updating loan file until all collected conditions are recorded within Encompass

Robot clicks custom button indicating loan "complete for stipulations step"

Robot returns to pipeline view and processes all loans until pipeline is emptied

*Use a different software? We can work with both Calyx & Byte as well.

pricing options

$2,500 minimum set up fee for all plans not included. Fee may vary for highly customized Encompass environments.

PLAN TYPE:	# OF FILES	PRICE
Standard	**Up to 200 Files/Month**	**$800/mo paid anually***
Premium	**Up to 650 Files/Month**	**$1,200/mo paid anually***
Elite	**650+**	**Call for Pricing**

*Plus the cost of UiPath licenses.

why neostella?

Our leadership team has extensive experience running telecom, software and SaaS companies, including a software company in the financial services sector utilized by hundreds of leading banks and lenders that was purchased by an industry leader. We have substantial experience working with highly regulated customers in demanding application environments, providing RPA solutions that yield quick ROI.

other banking experience

- Helping to handle remote deposit validations by verifying if checkbox has been marked and if funds need to be held

- Streamlining the transaction review process by enabling bot to match reference numbers in order to authorize or reject a transaction

- Automating check-clearing to increase speed and accuracy of processing

- Speeding up and refining compliance operations

- Know Your Customer (KYC) data input into appropriate systems

- Credit/debit fraud and dispute investigation & processing

- Cross-checking and outputting transaction matching reports

- Increasing speed of preparing customer statements

- Increasing the frequency and availability of internal reporting

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