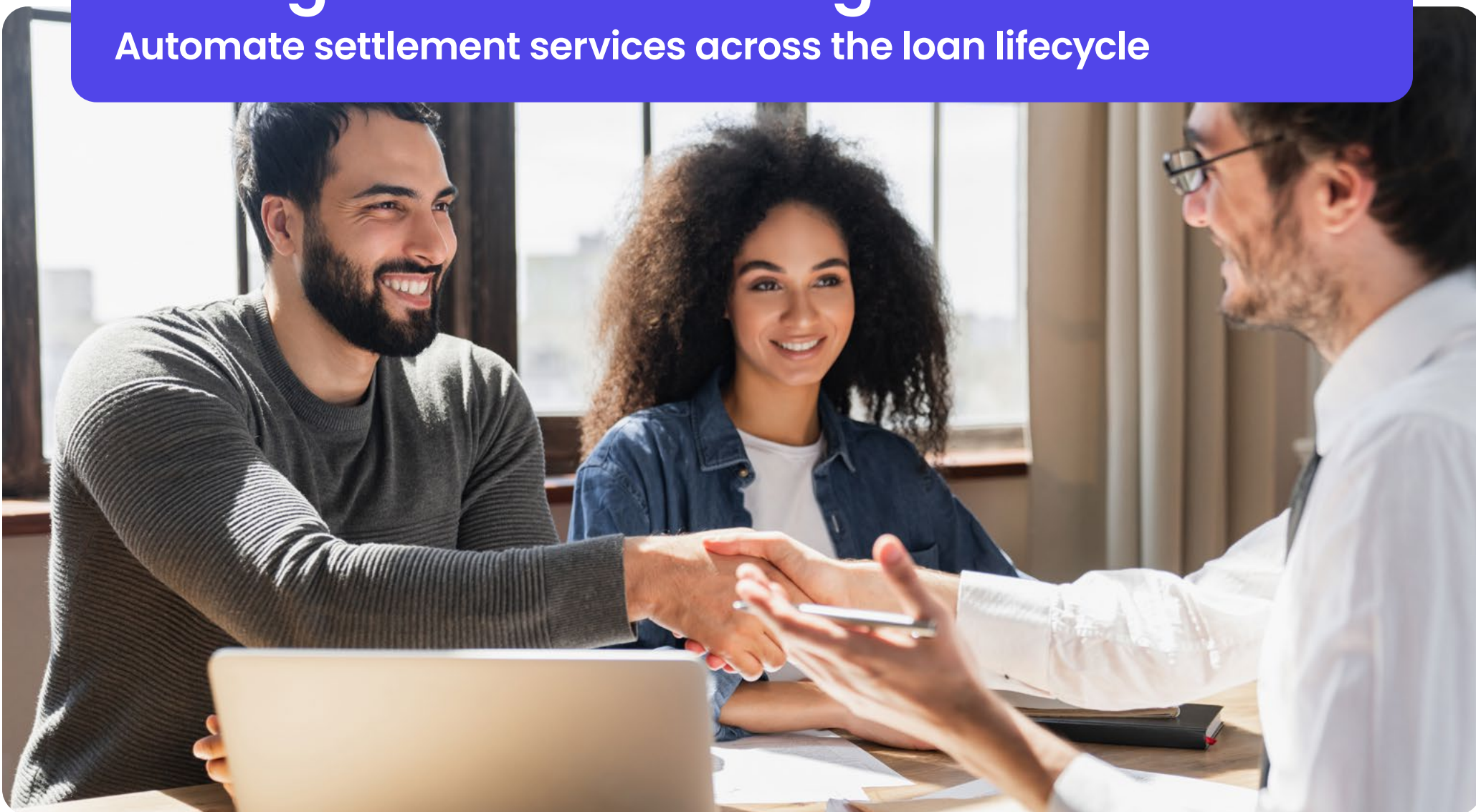




Intelligent Order Management Services

Automate settlement services across the loan lifecycle





Service delays and operational friction kill deals.

As borrowers demand fast and modern digital experiences, reducing time to close is critical, and lenders can't afford to slow down. But LOS platforms were built to process loans—not to guarantee the execution of every settlement service ordered against them.

The result is manual disclosure workflows, provider fragmentation and compliance exposure from avoidable delays. This is where FirstClose Order Management Services (OMS) comes in—owning everything between intent and confirmed delivery.

Seamless LOS Integration

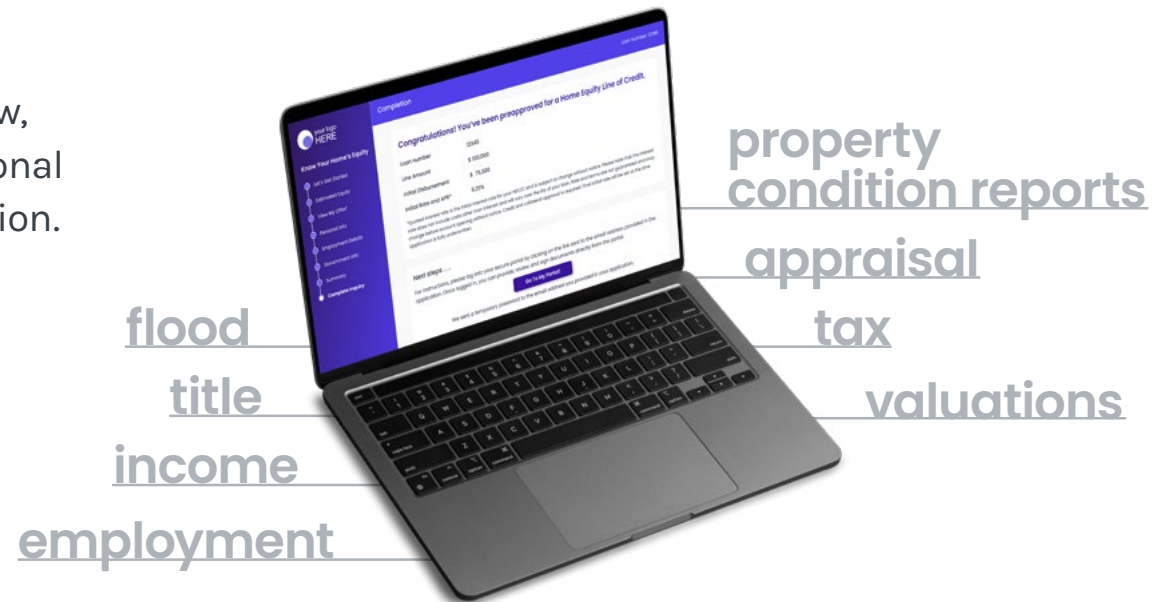
- MeridianLink
- ICE Encompass®
- And other leading LOS systems

Automate, track, and manage the ordering of critical services.

Consolidate the ordering and tracking of property, title, valuation, verification, and other settlement services onto a single platform.

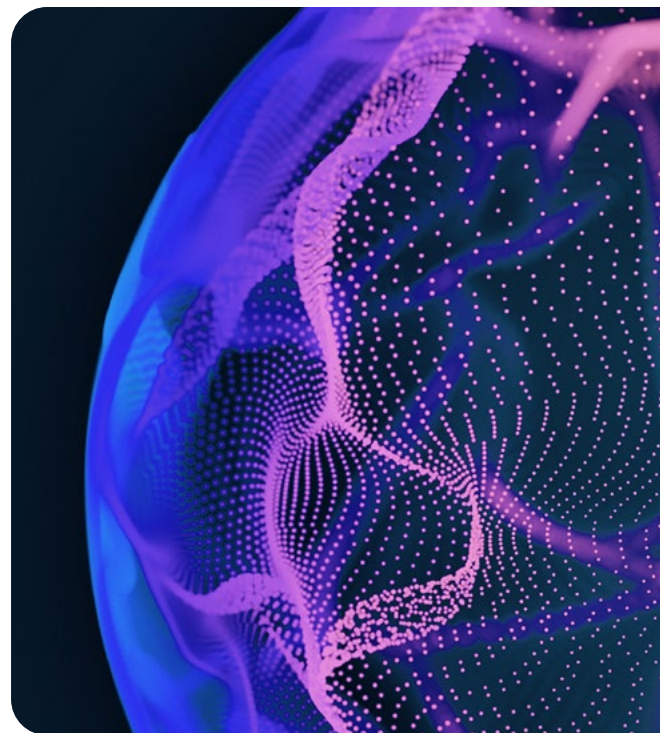
The FirstClose Intelligent OMS brings together the full spectrum of settlement services needed to support mortgage and home equity lending—all from a single intuitive interface.

Our powerful OMS platform delivers real-time provider coordination, document flow, and order visibility that improves operational efficiency and leads to borrower satisfaction.



Access every service you need from a single platform.

The FirstClose Intelligent OMS supports the ordering and delivery of a wide range of essential settlement and verification products, ensuring lenders have the data and documentation needed at every stage of the loan approval and closing process—all accessible through one platform.



Comprehensive Service Coverage

- Flood certification products
- Valuation services: automated valuation models (AVMs), home equity desktop valuations, field appraisals and hybrid solutions
- Evaluations and appraisals
- Property condition reports
- Legal & vesting products
- Title/property reports, owners & encumbrance reports
- Title & valuation insurance E&O coverage
- Title insurance, escrow, and closing products
- Document preparation and closing coordination
- Recording services
- Income/employment/account verification
- Tax status reporting

Work confidently, knowing we continually vet every provider.

Inaccurate information has a detrimental impact on closing time. That's why we continuously monitor and track performance metrics including accuracy, turn time, and pricing to help ensure you always receive exemplary service.

See how Sharonview took closings from 45 days to 7 days with FirstClose.

[Read the full story](#)



How it works.

Through automated workflows, seamless data integration, and real-time status visibility, our OMS delivers a more effective and efficient order management experience. Minimize manual touchpoints and operational costs and significantly improve cycle times from application through closing.

Intelligent Rules-Based Workflows

- Prepopulate loan data directly from your LOS to eliminate duplicate entries and reduce errors.
- Trigger settlement orders automatically or on-demand, based on business rules.
- Assign providers intelligently by product type, geography, loan type, or custom lender rules.
- Enable flexible ordering models—whether à la carte, one-click, or fully automated.

“We’ve been able to shave about a week off our timeline. That’s a significant improvement in efficiency, especially for our underwriters and borrowers.”

Lauren Schumacher

Senior Consumer Loan Underwriter
at Mascoma Bank

[Read the full story](#)

One-Click Ordering

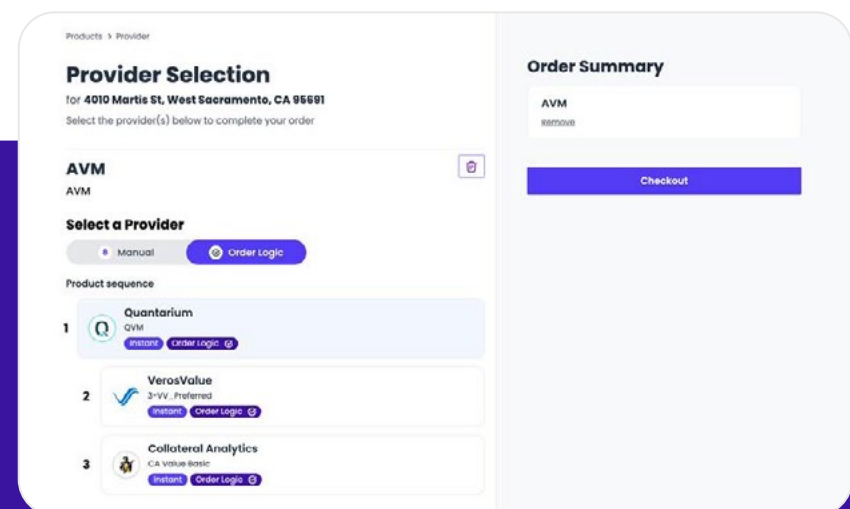
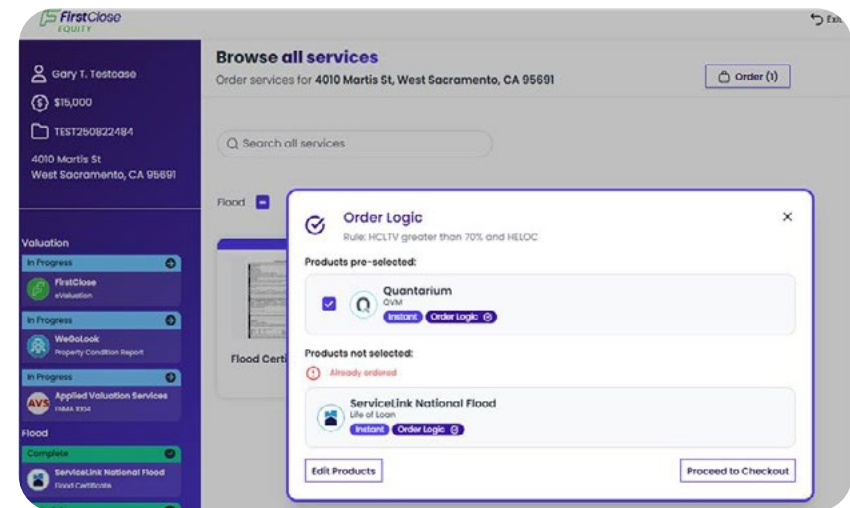
Auto-fill cart using
preset business rules.



How it works continued.

Seamless Integration & Data Flow

- **Direct LOS Integration:** Orders and results flow directly to and from your loan origination system, keeping loan data synchronized and reducing backend reconciliation.
- **Document Management:** Received reports and documents are automatically routed into the LOS, with data mapped to the appropriate fields.
- **Provider Collaboration:** Coordinate scheduling, messaging, and document exchange between your team and external service providers, all within the platform.



Automated Fallback Ordering

Automatically switch to alternate products when criteria aren't met.

How it works continued.

Operational Insights & Control

- **Real-time Dashboards:** View open, closed, or action-pending orders at a glance.
- **Standardized Reporting:** Track order status, provider performance, and trends to drive continuous improvement.
- **Custom Business Rules:** Tailor how orders are triggered and assigned to reflect your internal workflows and compliance needs.



See how Fortera CU cut manual processing time 85% with FirstClose.

[Read the full story](#)

FirstClose Order Management Automation

No more chasing providers—we manage every issue for you.

Rely on FirstClose as an extension of your operations team. Our team actively chases providers and manages follow-ups, and resolves exceptions—so your staff doesn't have to. By proactively monitoring every order in your pipeline, we ensure nothing slips past critical turn-time expectations.



FirstClose OMS providers deliver consistently.

30.9%

faster turnaround times

55.8%

fewer revisions

2 hours faster

completing revisions

Ready to streamline your order management process?

Gain a competitive edge by accelerating cycle times, lowering operating costs, and freeing staff to focus on high-value activities.

- ✓ Reduce friction, cost, and risk associated with manual processes.
- ✓ Improve productivity across operations teams.
- ✓ Enhance the borrower experience with faster response times and fewer delays.
- ✓ Support data accuracy and compliance through workflow governance and automated data handling.

Contact us today for a personalized demo.

877-677-3282 | sales@firstclose.com | firstclose.com

