

Subscription Model Overview

Mortgage lenders like you are using Nexus Vision to gather and use data effectively, improving productivity and efficiency. Nexus Vision features intuitive dashboards, instant views of pipeline and performance data, loan-level drill downs, scorecards, and more. The product includes six modules to organize key insights and analytics on all aspects of your mortgage lending.

Given that each business has different requirements for reporting, insights and analytics, Nexus Vision offers a multi-level subscription model. The three subscription levels – Base, Standard, and Enterprise – provide different access to the various components of Nexus Vision’s six modules. Below is an overview of the three subscription levels:

Subscription	Overview
Base	<ul style="list-style-type: none"> Requires no implementation fee Provides default field mapping Enables access to 15 visuals and 16 reports within three modules Included for all new SimpleNexus platform customers <ul style="list-style-type: none"> For customers with Encompass LOS who have provided API user access and/or an existing CompenSafe subscription, the deployment will be within 4-6 weeks For customers with other LOSs, the deployment will involve additional scoping and implementation
Standard	<ul style="list-style-type: none"> Requires implementation fee Allows custom field mapping Provides company hierarchy and role-based user permissions Supports full KPI library with custom targets Includes 16 scorecards Enables access to 51 visuals and 41 reports within five modules
Enterprise	<ul style="list-style-type: none"> Requires both implementation and integration fees Includes all standard subscription features Enables Financials module and GL mapping Provides full access to all six modules

A more detailed comparison of what is available for each subscription level is below (✓ indicates availability of the various screens for the three offerings).

Leads & Partners Module Screen Description	Subscription		
	Base	Standard	Enterprise
At a Glance		✓	✓
Insights: Ranking by Partner		✓	✓
Reports: Lead Sources		✓	✓
Reports: Buyer Agencies		✓	✓
Reports: Leads		✓	✓
Reports: Applications from Leads		✓	✓
Reports: Funded from Leads		✓	✓

Pipeline Module Screen Description	Subscription		
	Base	Standard	Enterprise
At a Glance	√	√	√
Sales Pipeline Activity	√	√	√
Insights: Active Pipeline Lock Status	√	√	√
Insights: Upcoming Closings Insight	√	√	√
Insights: Sales Pipeline Funnel		√	√
Insights: Active Pipeline Product Distribution	√	√	√
Insights: Active Pipeline Loan Characteristics	√	√	√
Insights: Active Pipeline Borrower Characteristics	√	√	√
Insights: Operations Pipeline		√	√
Insights: Operations Assignments		√	√
Insights: Pipeline Trends		√	√
Reports: New Apps	√	√	√
Reports: New Locks	√	√	√
Reports: Expired Locks	√	√	√
Reports: Submitted to Processing	√	√	√
Reports: Pipeline Loans with Underwriting Criteria	√	√	√
Reports: Loans on LO Desk	√	√	√
Reports: Submitted to Underwriting	√	√	√
Reports: Active Pipeline	√	√	√
Reports: Expires <= 7 days	√	√	√
Reports: Processing Details for Active Pipeline		√	√
Reports: Fees		√	√

Production Module Screen Description	Subscription		
	Base	Standard	Enterprise
At A Glance	√	√	√
Insights: Funded Loan Product Distribution	√	√	√
Insights: Funded Loan Characteristics	√	√	√
Insights: Funded Borrower Characteristics	√	√	√
Insights: Milestone Utilization	√	√	√
Insights: eClose Adoption Trends	√	√	√
Insights: eClose ROI Trends	√	√	√
Insights: Production Turn Times		√	√
Reports: Funded per Processor	√	√	√
Reports: Funded per LO	√	√	√
Reports: Government	√	√	√
Reports: Lock Pull-Thru	√	√	√
Reports: Purchases	√	√	√
Reports: App to Fund	√	√	√
Reports: Sold to Investor	√	√	√
Reports: Revenue		√	√
Reports: Aging Loans in Inventory		√	√
Reports: Assignments by Position for Funded Loans		√	√
Reports: Fees		√	√

Performance Module	Subscription		
	Base	Standard	Enterprise
Insights: Monthly LO Rankings	√	√	√
At a Glance		√	√
Insights: KPI Insights		√	√
Insights: Employees Ranked Per KPI		√	√
Insights: KPIs for Each Employee		√	√
Insights: Weighted Score Leaderboard		√	√
Insights: Position Rankings by Weighted Score		√	√
Insights: Branch Leaderboard by Weighted Score		√	√
Insights: Branch Rankings by Weighted Score		√	√
Scorecard: LO Scorecard		√	√
Scorecard: Branch Scorecard		√	√
Scorecard: Processor Scorecard		√	√
Scorecard: LOA Scorecard		√	√
Scorecard: UW Scorecards		√	√
Scorecard: Closer Scorecard		√	√
Scorecard: Lender Scorecard		√	√
Scorecard: Broker Scorecard		√	√
Scorecard: Account Executive Scorecard		√	√
Scorecard: Post Closer Scorecard		√	√
Scorecard: Buyer Agent Scorecard		√	√
Scorecard: Buyer Agency Scorecard		√	√
Scorecard: Settlement Agency Scorecard		√	√
Scorecard: Investor Scorecard		√	√
Scorecard: Servicer Scorecard		√	√
Scorecard: Funder Scorecard		√	√
Projections		√	√
Reports: Total Headcount		√	√
Reports: Total Operations Support		√	√
Reports: Total Producers		√	√
Reports: Producers by YTD weighted score		√	√
Reports: Tenured producers by YTD units		√	√
Reports: Projections to YTD Actuals: Units		√	√
Reports: Projections to YTD Actuals: Volume		√	√
Reports: Projections to YTD Actuals: Purchase Loans		√	√
Reports: Projections to YTD Actuals: Government Loans		√	√
Reports: Projections to YTD Actuals: Tenured Producers		√	√

Historical Trends Module

Screen Description	Subscription		
	Base	Standard	Enterprise
At a Glance		√	√
Insights: Geographic Production		√	√
Insights: Streamgraph		√	√
Insights: Headcount Trends		√	√
Reports: Applications		√	√
Reports: Funded		√	√
Reports: Locks		√	√
Reports: Credit Reports		√	√

Financials Module

Screen Description	Subscription		
	Base	Standard	Enterprise
At a Glance			√
Insights: Loan Profitability			√
Insights: Branch Revenue Trends			√
Insights: Incentives			√
Commission Calculator			√
Reports: Comp \$ Per Loan			√
Reports: Comp BPS per Loan			√
Reports: LO Compensation Paid per Loan			√
Reports: Draw Balance			√
Reports: # Employees with Draw Balance			√
Reports: Draw Status			√
Reports: Funded vs. Compensation			√
Reports: Distribution of LO Compensation Paid			√
Reports: Unearned Guarantees			√
Reports: Loan Compensation by Type			√

Get started today!

For more information on Nexus Vision, contact your customer success manager or email us at sales@simplenexus.com.