Mortgage365 makes mortgage digital transformation possible by innovating tools that allow lenders to empower their originators, engage their consumers, optimize their operations, and redefine mortgage product accessibility. Built on Microsoft Power Platform, our mortgage-aware data unification platform, MortgageOS, powers Mortgage365, our mobile-enabled LO WorkSurface. Together, these products put the LO at the center of their universe, with unfettered access to their borrower data, and fully developed integrations with the leading mortgage solutions across the industry.

Lead Capture
The LO WorkSurface is integrated with lead source engines, and connected to powerful Dynamics Marketing for highly detailed campaigns and with LO Landing Pages.

Opportunity Creation
LOs can pull credit, view property valuations, create side-by-side loan scenarios, and complete automated underwriting (LP and DU) all within the Mortgage365 WorkSurface.

Lead Management
The LO WorkSurface is designed to give LOs a singular location to manage tasks and activities, borrower emails, and sales work flows and borrower prioritization.

Loan Application
Supported by our integrations with leading CRMs and POSs, the LO can natively add HMDA information, view APR, Fees, and Closing Costs, and trigger RESPA within the WorkSurface.

Loan Origination
The Mortgage365 WorkSurface is natively integrated with Ellie Mae’s Encompass, with a two-way sync to power LOs.

Loan Ownership
Once the loan has been closed, the LO is empowered to maintain an annual check-in, referrals, and coming soon: new loan opportunity mining.