

HECM ToolBox (One Click Integration)

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About

HECM Toolbox is a sales presentation software tool that is proven to convert more borrower prospects to closed loans. By design the sales and education process starts in HECM Toolbox to present with easy-to-understand data visualization via the HECM Tool Report, then when the borrower prospect is ready to take the next step a counseling package and proposal is created in QuantumReverse.

Integration QuantumReverse - HECM Toolbox

Currently the integration allows for creating HECM Toolbox illustrations and reports using loan programs.

The Integration is on a Company Level!

Meaning, the company you are within QuantumReverse sets up the integration. A loan officer will be identified between QuantumReverse and HECM Toolbox via:

1. The Company they work with
2. The Email Address (in case of QuantumReverse the Log-in Email Address).

One Click Process of setting up an integration

This is very simple, but before you set it up, you must have an account in HECM Toolbox with the email address of the person who sets it up!

From within QuantumReverse Admin Site:

Under Service Providers select HECM Toolbox and then click Integrate with HECM Toolbox



The screenshot displays a software interface with a sidebar menu on the left, a central list of items, and a right-hand panel titled "HECM Toolbox".

Sidebar Menu:

- Products
 - Product Configuration
 - Product Access
 - Fee Templates
 - Product Types
- Relationship
 - Child Relationships
 - Parent Relationships
 - Broker Compensation
 - PA Shared Products
 - Create Products
 - Child Product Access
 - Wholesale Config
 - Trusted Advisors
- Operation
 - Service Providers
 - Milestones
 - Fee Handling
 - Operation Details
 - eSign Configuration
 - Dashboard Config.
 - Dashboard Alloc.
 - Dynamic Fields
- Documents
 - Document Packages
 - Doc. Customization
 - Counselor List
 - Letter Templates
 - Doc. Exp. Templates
 - Doc. Mgmt. View
- Underwriting
 - Standard Conditions
 - Reason for Denial
 - Workflow Config
- Accounting
 - Invoices

Central List:

- Document Preparation (808)
- MERS Loan Registration (809)
- Courier (810)
- Processing Fee1 (812)
- (813)
- Second Appraisal (814)
- Condo or PUD Questionnaire (815)
- Administration fee (816)
- Trust Review (817)
- Training Fee (819)
- Servicing Fee (820)
- Homeowners Insurance (903)
- Title Service (1102)
- Title Insurance Commitment (1104)
- Servicer
- Sub Servicer
- Investor
- Warehouse Lender
- Document Custodian
- FraudGuard
- Collateral Desktop Analysis
- Second Collateral Desktop Analysis
- Trustee For Deed Of Trust

Right-Hand Panel:

- HECM Toolbox
- Integrate with HECM Toolbox

One Click Integrations:

- Name
- Reverse Focus
- Contract Processors
- HECM Toolbox

In the Pop-up confirm "Enable API for HECM Toolbox":

The screenshot displays the QuantumReverse user interface. On the left is a navigation sidebar with the following categories and items:

- Products**
 - Product Configuration
 - Product Access
 - Fee Templates
 - Product Types
- Relationship**
 - Child Relationships
 - Parent Relationships
 - Broker Compensation
 - PA Shared Products
 - Create Products
 - Child Product Access
 - Wholesale Config
 - Trusted Advisors
- Operation**
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- Accounting**
 - Invoices

The main content area on the right is titled "HECM Toolbox" and contains a list of services:

- Document Preparation (808)
- MERS Loan Registration (809)
- Courier (810)
- Processing Fee1 (812)
- (813)
- Second Appraisal (814)
- Condo or PUD Questionnaire (815)
- Administration fee (816)
- Trust Review (817)
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- Sub Servicer
- Investor
- Warehouse Lender
- Document Custodian
- FraudGuard
- Collateral Desktop Analysis
- Second Collateral Desktop Analysis
- Trustee For Deed Of Trust

Below this list is a section titled "One Click Integrations" with a table:

Name
Reverse Focus
Contract Processors
HECM Toolbox

At the top right of the main content area, there is a link that says "Integrate with HECM Toolbox".

What happens next

QuantumReverse will set up an API integration with HECM Toolbox and inform HECM Toolbox of the integration request.

HECM Toolbox will then set up the integration from their side.

It may take up to 1-2 business days for the setup to be complete.

Once set-up is completed all loan officers will be emailed a 14-day free trial **activation link**

(<https://hecmtoolbox.com/freetrial/>).

The activation link will expire after 72 hours.

To Terminate the Integration?

Follow the same steps, but click Revoke



